

ORACLE®

PEOPLESOFT

PeopleSoft Financials/Supply Chain Management 9.2 (through Update Image 11) Installation

November 2015

ORACLE®

PeopleSoft Financials/Supply Chain Management 9.2 (through Update Image 11)
Installation
SKU ifscm92_PI11_Nov_2015

Copyright © 2015, Oracle and/or its affiliates. All rights reserved.

Trademark Notice

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

License Restrictions Warranty/Consequential Damages Disclaimer

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

Warranty Disclaimer

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Restricted Rights Notice

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS:

Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

Hazardous Applications Notice

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Third Party Content, Products, and Services Disclaimer

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Contents

Preface

- About This Documentation 13**
- Understanding This Documentation 13
- Audience 13
- Typographical Conventions 14
- Products 15
- Related Information 16
- Comments and Suggestions 16

Chapter 1

- Preparing for Installation 17**
- Understanding the Installation 17
- Using the Oracle Software Delivery Cloud to Obtain Installation Files 17
- Reviewing Licensing Notes 17
- Installing PeopleSoft PeopleTools 18
- Installing Application Files to the Custom PS_APP_HOME Location 18
- Reviewing the Demo Database Size 18

Chapter 2

- Setting Up the PeopleSoft Financials/Supply Chain Management Database 21**
- Setting Up Installation Defaults for the System Database 21
- Deleting Summary Trees for the System Database 21
- Reviewing DB2 z/OS Requirements 21
 - Reviewing the EDM Pool Size 22
 - Reviewing the Server Transfer Program Log 22
- Setting Up the Database for the Chartfield Configuration Process 22
 - Understanding Database Requirements for the ChartField Configuration Process 22
 - Defining Settings for the ChartField Configuration Process 23
- Accessing FSCM Applications from PeopleSoft Portal Solutions 23

Chapter 3

- Configuring Application SQRs and COBOL for the DB2 z/OS Server 25**
- Understanding SQR and COBOL Processing on the DB2 z/OS Server 25
- Allocating Data Sets on the z/OS File System 25

Modifying the JCL Shells 27

Chapter 4

Setting Up Mobile Approvals 29
Prerequisites 29
Granting Security to Users 29
Configuring Mobile Approvals 29
 Understanding Configuring Mobile Approvals 30
 Prerequisites 30
 Adding the Approvals Fluid Role 31
 Setting Mobile Approval Options 31
 Deploying the Mobile Approval IB Service 32
 Validating FSCM REST Services 33
 Verifying Inactive Service Operations 33
 Verifying Active Service Operations 34
 Performing Local Node Introspection and Deployment 36
 Performing MAP File Synchronization 37
 Activating Push Notification 38

Chapter 5

Configuring Global Search Using Oracle Secure Enterprise Search (SES) 41
Understanding Configuring Global Search Using Oracle Secure Enterprise Search 41
Prerequisites 42
Defining New Roles for Global Search 42
Defining Search Group Display 43
 Understanding Search Group Display 43
 Adding the Search Group to the Home Page Search Context 44
 Enabling the Global Search Box in the Page Header 44
Verifying the Setup of Portal Node in PeopleSoft FSCM 44
Identifying FSCM Search Definitions for Attachments 45
Deploying and Indexing Delivered Search Definitions 47
 Deploying Indexes 47
 Building an Index 48
Upgrading File Attachments 48

Chapter 6

Installing PeopleSoft 9.2 General Ledger 53
Prerequisites 53
Changing a URL Definition for General Ledger File Import (Optional) 53

Defining an Environmental Variable on a Process Scheduler Server	54
Running File Import Processes Using the z/OS Database	54

Chapter 7

Installing and Setting Up Forms Processing for PeopleSoft 9.2 Grants	55
Understanding Forms Processing	55
Downloading the Forms from the Sponsor Web Sites	55
Setting Up the Forms URL Maintenance Area in PeopleSoft	56
Entering the Names of the PDF Templates (Optional)	57
Printing the Forms (Optional)	58
Viewing Reports	59

Chapter 8

Installing PeopleSoft 9.2 Expenses	63
Configuring PeopleSoft Integration Broker	63
Understanding the PeopleSoft Integration Broker Configuration	63
Setting Up Gateways	63
Activating the Local Domain	66
Activating Queue Definitions	66
Setting up Service and Handlers	67
Verifying the Message Channel Status	70
Configuring the Employee Portal Servlet URL	71

Chapter 9

Installing PeopleSoft 9.2 Pay/Bill Management	73
Understanding PeopleSoft 9.2 Pay/Bill Management	73
Prerequisites	73
Verifying Integration Points	73
Understanding Integration Points Verification	74
Setting Up Node Definitions for Single Signon	74
Setting Up Portal Nodes	79
Setting Up Single Signon	83
Setting Up Integration Gateways	84
Activating Local Domains	92
Activating Queue Definitions	93
Setting Up the PeopleSoft System-Delivered Service Operations	96
Verifying the Installation Tables for PeopleSoft HCM and PeopleSoft FSCM	96
Verifying the Installation Table for PeopleSoft HCM	96
Verifying the Installation Table for PeopleSoft FSCM	97

Chapter 10

Installing Notifications Framework for PeopleSoft 9.2 Purchasing 99

Understanding Notifications Framework for PeopleSoft 9.2 Purchasing 99

Activating the Local Domain 99

Verifying the Message Channel Status 100

Configuring the Employee Portal Servlet URL 101

Chapter 11

Installing PeopleSoft 9.2 ESA and FSCM Portal Packs 103

Granting Access to Navigation Pages 103

Granting Access to Personalize the Portal Homepage 103

Enabling Pagelet Creation and Access with Portal Utilities 103

Chapter 12

Integrating PeopleSoft 9.2 Project Costing and Program Management with Microsoft Project 2007, 2010, or 2013 105

Understanding the PeopleSoft-Microsoft Project Integration 105

Installing the PeopleSoft-Microsoft Project Integrator 105

Configuring the PeopleSoft-Microsoft Project Integrator 106

Chapter 13

Defining an FTP Server for File Attachments in PeopleSoft 9.2 Project Costing 109

Understanding File Attachment Storage 109

Setting Up File Attachment Storage on the Database 109

Setting Up File Attachment Storage on a File Server 109

Chapter 14

Setting Up PeopleSoft 9.2 Staffing Front Office 111

Setting Up Document Attachments 111

 Understanding Document Attachments 111

 Setting Up the File Attachment Server 111

Setting Up the Secured Enterprise Search Engine 113

Integrating Resume Parsing for PeopleSoft Staffing Front Office 113

 Understanding Resume Parsing for PeopleSoft Staffing Front Office 113

 Setting Up Staffing Installation Options for Resume Parsing 113

 Configuring the PeopleSoft Integration Broker 116

Setting Up Mapping 124
 Assigning Mapping Setups 132
 Defining Mapping Values 133

Chapter 15

Integrating PeopleSoft Transaction Billing Processor with PeopleSoft Customer Relationship Management 135

Understanding PeopleSoft Transaction Billing Processor and PeopleSoft Customer Relationship Management Integration 135
 Activating the Integration Queues 135
 Activating the Integration Services and Routings 136
 Understanding Integration Service and Routing Activation 136
 Understanding New Routing Definition Creation 137
 Activating the Integration Services and Configuring the Routing Definition 138
 Transforming the Contract Transaction Service 144

Chapter 16

Installing PeopleSoft 9.2 Maintenance Management with Microsoft Project 2007/2010 149

Understanding the Integration with Microsoft Project 149
 Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine 149
 Installing Microsoft Project 2007/2010 150
 Configuring the Microsoft Project Integration Process 150

Chapter 17

Installing PeopleSoft Maintenance Management 9.2 Work Order Attachment Print 153

Understanding PeopleSoft Work Order Attachment Print 153
 Prerequisites 153
 Verifying the URLs and the Installation Location 154
 Modifying the Attachment Print Command URL 154
 Modifying the Attachment Print Directory URL for an Alternate Download Holding Directory 155
 Enabling the PeopleSoft Work Order Attachment Print Features 155

Chapter 18

Integrating PeopleSoft 9.2 Asset Management and Physical Inventory Solutions 157

Understanding the Integration of PeopleSoft 9.2 Asset Management with Physical Inventory 157
 Configuring the Local Gateway 157
 Configuring the Inbound Nodes 158
 Activating Service Operations 160
 Running Message Channel 165

Activating the Domain for Asynchronous Messaging 166

Chapter 19

Integrating PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems 169
 Understanding the Integration of PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems 169
 Reviewing Configuration Values for IT Asset Management 169
 Configuring the Local Gateway 170
 Configuring the Inbound Nodes 171
 Activating Service Operations 173
 Managing Queue Status 176
 Activating the Domain for Asynchronous Messaging 178

Chapter 20

Installing PeopleSoft 9.2 Mobile Inventory Management 181
 Understanding the PeopleSoft 9.2 Mobile Inventory Management Product 181
 Prerequisites 182
 Accessing Installation Files 183
 Installing the Oracle WebLogic Server for Mobile 184
 Understanding the Oracle WebLogic Server Installation for Mobile 184
 Installing the Oracle WebLogic Server for PeopleSoft Mobile Inventory Management 184
 Starting the Configuration Wizard to Define a New Domain 190
 Installing the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management .
 199
 Understanding the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory
 Management 200
 Installing the Oracle Application Development Runtime Installer 200
 Configuring Components Using the Configuration Wizard 209
 Starting the Administration Server 216
 Applying the PeopleSoft Mobile Inventory Management Authentication Provider 217
 Understanding the PeopleSoft Authentication Provider 217
 Prerequisites 217
 Copying the wlPSFTSecurityProviders.jar File 218
 Copying the PeopleSoft psjoa.jar File 218
 Adding the PeopleSoft Authentication Provider to the Active Security Realm 219
 Setting Up the PeopleSoft Database for PeopleSoft Mobile Inventory Management 235
 Understanding the PeopleSoft Database Setup for PeopleSoft Mobile Inventory Management 236
 Setting Up Integration with the PeopleSoft System 236
 Reviewing the Setup of PeopleSoft Mobile Inventory Management in PeopleSoft Integration Broker 245
 Granting Security to PeopleSoft Mobile Inventory Management Objects 250
 Rebooting the PeopleSoft Application Server 250

Verifying PeopleSoft Integration Broker is Web Service Enabled	251
Setting Installation Options	251
Deploying the Mobile Application to Oracle Application Developer for an Oracle WebLogic Server	252
Undeploying the Mobile Application	263

Chapter 21

Configuring WS-Security for PeopleSoft Mobile Inventory Management	269
Understanding WS-Security	269
Prerequisites	269
Understanding the Configuration Process	270
Configuring WS-Security for PeopleSoft Mobile Inventory Management	271
Running the Oracle Repository Creation Utility	271
Installing the Oracle Web Services Manager	282
Configuring the Certificates	291
Creating and Configuring the Keystore and Credential Store	297
Adding the SAML Definition Information to the PeopleSoft System	302
Updating the connections.xml to Enforce Security Policies	310

Chapter 22

Creating and Deploying a Customization Environment for PeopleSoft Mobile Inventory Management .	313
Understanding the Customization Environment for PeopleSoft Mobile Inventory Management	313
Prerequisites	313
Creating a Customization Environment for PeopleSoft Mobile Inventory Management	313
Creating the Customization Environment	314
Creating the Customization EAR File	316

Chapter 23

Configuring eMail URLs in PeopleSoft SCM Applications	321
Configuring eMail URLs	321
Understanding eMail Configuration	321
Configuring eMail URLs for Item Loader Exceptions	321
Configuring eMail URLs for Supplier Facing Applications	322
Configuring eMail URLs for PeopleSoft eBill Payment	325
Setting Up Pagelets	326
Accessing Pagelets	326
Enabling Pagelet Creation and Access with Portal Utilities	327
Granting Access to Navigation Pages	327

Chapter 24

Setting Up PeopleSoft Supplier Relationship Management Applications 329
Reviewing the PeopleSoft 9.2 Supplier Contract Management Setup 329
Installing PeopleSoft 9.2 eProcurement 329
 Understanding PeopleSoft 9.2 eProcurement Installation 330
 Installing PeopleSoft eProcurement CUP Item Export 330
Granting Security in PeopleSoft Mobile eProcurement 334
 Understanding PeopleSoft Mobile eProcurement 334
 Granting Access to Component Interfaces 334
 Granting Access to Web Libraries (IScript Functions) 336
 Granting Access to Users 339
Setting Up the Secure Enterprise Search Engine in Mobile eProcurement 340
 Understanding Oracle Secure Enterprise Search (SES) 340
 Indexing and Deploying Search Definitions 340
 Application Searching (Global Search) Security 344

Chapter 25

Installing PeopleSoft 9.2 In-Memory Products 347
Installing In-Memory Project Discovery 347
Installing In-Memory Real-Time Bottom Line 347

About This Documentation

This preface discusses:

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

Understanding This Documentation

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

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

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

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

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

Audience

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

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

- SQL and SQL command syntax.
- PeopleSoft system navigation.
- PeopleSoft windows, menus, and pages, and how to modify them.
- Microsoft Windows.

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

See Oracle University, <http://education.oracle.com>.

Typographical Conventions

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

Convention	Description
Monospace	Indicates a PeopleCode program or other code, such as scripts that you run during the install. Monospace is also used for messages that you may receive during the install process.
<i>Italics</i>	Indicates field values, emphasis, and book-length publication titles. Italics is also used to refer to words as words or letters as letters, as in the following example: Enter the letter <i>O</i> .
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or page.
lower case	File or directory names are represented in lower case, unless they appear otherwise on the interface.
Menu, Page	A comma (,) between menu and page references indicates that the page exists on the menu. For example, "Select Use, Process Definitions" indicates that you can select the Process Definitions page from the Use menu.
Cross-references	Cross-references that begin with <i>See</i> refer you to additional documentation that will help you implement the task at hand. We highly recommend that you reference this documentation. Cross-references under the heading <i>See Also</i> refer you to additional documentation that has more information regarding the subject.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meaning.
⇒ (line-continuation arrow)	A line-continuation arrow inserted at the end of a line of code indicates that the line of code has been wrapped at the page margin. The code should be viewed or entered as a continuous line of code, without the line-continuation arrow.
Note. Note text.	Text that begins with <i>Note</i> . indicates information that you should pay particular attention to as you work with your PeopleSoft system.

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

Products

This documentation may refer to these products and product families:

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

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

See <http://www.oracle.com/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 and on the Oracle PeopleSoft Online Help site:

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

To access documentation on My Oracle Support, go to <https://support.oracle.com>.

To access PeopleSoft Online Help (PeopleBooks), go to the Oracle PeopleSoft Online Help site:

http://docs.oracle.com/cd/E17566_01/epm91pbr0/eng/psbooks/psft_homepage.htm.

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 Online Help (PeopleBooks), and other Oracle reference and training materials. Please send your suggestions to:

PSOFT-Infodev_US@oracle.com

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

Chapter 1

Preparing for Installation

This chapter discusses:

- Understanding the Installation
- Using the Oracle Software Delivery Cloud to Obtain Installation Files
- Reviewing Licensing Notes
- Installing PeopleSoft PeopleTools
- Installing Application Files to the Custom PS_APP_HOME Location
- Reviewing the Demo Database Size

Understanding the Installation

This documentation includes pre-installation requirements, installation notes, and installation and configuration instructions specific to PeopleSoft Financials/Supply Chain Management (FSCM) 9.2 applications. This documentation is organized into sections by PeopleSoft application products. This chapter includes prerequisite information for the PeopleSoft FSCM 9.2 installation.

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

Before beginning the installation, you must obtain the PeopleSoft Financial/Supply Chain Management (FSCM) 9.2 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 portal at <http://edelivery.oracle.com>.

Task 1-2: Reviewing Licensing Notes

Review the licensing notes for PeopleSoft FSCM 9.2. These licensing notes contain supplemental licensing information related to the licensing of PeopleSoft products and products from other suppliers that PeopleSoft uses as part of our infrastructure.

See My Oracle Support (Doc Id 1539492.1), for Licensing Notes for Oracle's PeopleSoft Financials and Supply Chain Management 9.2.

Task 1-3: Installing PeopleSoft PeopleTools

Before installing PeopleSoft FSCM, you must install PeopleSoft PeopleTools and create your PeopleSoft FSCM database.

See the chapters on creating a database in the PeopleSoft PeopleTools Installation documentation for your database platform.

Unless otherwise noted, PeopleSoft FSCM 9.2 requires the installation of PeopleSoft PeopleTools 8.54.08 or higher.

Note. This document is not a standalone installation guide and does not contain PeopleSoft PeopleTools installation instructions. When installing PeopleSoft FSCM, ensure that you use both the PeopleSoft PeopleTools Installation guide for your database platform and these PeopleSoft FSCM installation instructions. The PeopleSoft PeopleTools Installation guide is available on My Oracle Support.

Task 1-4: 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 *v* 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 PeopleSoft: PeopleTools installation guide for your database platform for more information on database creation.

See *PeopleTools: System and Server Administration*.

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 custom *PS_APP_HOME* location, then this variable will be equal to *PS_HOME*.

Task 1-5: Reviewing the Demo Database Size

The following table lists the approximate PeopleSoft FSCM 9.2 Demo database size for each RDBMS platform.

Platform	Approximate Database Size
Oracle — Non-Unicode/Unicode	21 GB

Platform	Approximate Database Size
DB2 LUW — Non-Unicode	52 GB
DB2 LUW — Unicode	82 GB
DB2 z/OS — Non-Unicode	32.3 GB
DB2 z/OS — Unicode	39 GB
Microsoft SQL Server — Non-Unicode	6.5 GB
Microsoft SQL Server — Unicode	9 GB

Oracle recommends that you increase the Database Size Heap for the DB2 LUW platform only to a minimum of 20,000 to avoid any temporary table failure during Demo database creation.

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

Chapter 2

Setting Up the PeopleSoft Financials/Supply Chain Management Database

This chapter discusses:

- Setting Up Installation Defaults for the System Database
- Deleting Summary Trees for the System Database
- Reviewing DB2 z/OS Requirements
- Setting Up the Database for the Chartfield Configuration Process
- Accessing FSCM Applications from PeopleSoft Portal Solutions

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

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

```
EPINSSYS.DMS -- Installation Defaults
```

This script establishes the installation defaults for the database. This only runs against the System (SYS) database.

Task 2-2: Deleting Summary Trees for the System Database

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

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

This script deletes all of the summary trees from the database. This only runs against the System (SYS) database.

Task 2-3: Reviewing DB2 z/OS Requirements

This section discusses:

- Reviewing the EDM Pool Size
- Reviewing the Server Transfer Program Log

Task 2-3-1: Reviewing the EDM Pool Size

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

Task 2-3-2: Reviewing the Server Transfer Program Log

As a DB2 z/OS customer, you may see the following error message in the log file PSXFR.LOG that is generated when you run the PeopleSoft Server Transfer program:

```
501 Invalid data set name <name>. Use MVS Dsname conventions
```

Note. For details on PeopleSoft Server Transfer program, review the chapter "Setting Up the Batch Environment on z/OS" in PeopleTools Installation for DB2 for zOS for the current PeopleTools release found in My Oracle Support.

Ignore this error for the following files because they are not used in a DB2 z/OS environment:

- 853AUDRT.SQR
- 854AUDRT.SQR
- 853INDRT.SQC
- 853TBLRT.SQC
- 853TRGRT.SQC
- 854INDRT.SQC
- 854TBLRT.SQC
- 854TRGRT.SQC

Task 2-4: Setting Up the Database for the Chartfield Configuration Process

This section discusses:

- Understanding Database Requirements for the ChartField Configuration Process
- Defining Settings for the ChartField Configuration Process

Understanding Database Requirements for the ChartField Configuration Process

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

Task 2-4-1: Defining Settings for the ChartField Configuration Process

DB2 LUW

- Update the locking mode to share:

```
db2set DB2_RR_TO_RS=yes
```

Note. This parameter is depreciated from DB2 LUW version 10.1 onwards.

- Include the following command in the DBMCFG.SQL configuration file:

```
UPDATE DBM CFG USING QUERY_HEAP_SZ 64000
```

- Log file size (4KB): (LOGFILSIZ) = 24000
- Number of primary log files: (LOGPRIMARY) = 20
- Use the following minimum Tablespace sizes (you may need to increase these sizes):
 - BDAPP — 9720
 - BDAPPIDX — 2680
 - BDLARGE — 1191
 - FAAPP — 11312
 - FSLARGEIDX — 13568
 - LCAPP — 28572
 - LCAPPIDX — 2600
- Recycle the instance after changing the settings.

DB2 z/OS

Oracle recommends no changes.

Microsoft SQL Server

Oracle recommends no changes.

Oracle

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

Changing the dml_locks setting requires that you recycle the instance.

Task 2-5: Accessing FSCM Applications from PeopleSoft Portal Solutions

Only perform this task if you use the PeopleSoft Portal Solutions product and want to access your PeopleSoft Financials, ESA, or SCM application from within the PeopleSoft Portal Solutions database.

The installation phase of your PeopleSoft application should only entail setting up a single link to the PeopleSoft application content provider. To set up the single link and the single sign on, see the following sections of the PeopleSoft Portal Solutions installation documentation:

- "Installing PeopleSoft Single Sign-On"
 - "Accessing PeopleSoft Content Providers"
 - "Installing Services Procurement Navigation"
 - "Creating Content Provider Navigation Collections (Recommended)" discusses additional product-specific steps you may need to perform for fully functional navigation within the PeopleSoft Portal Solutions database.
- See PeopleSoft Portal Solutions Installation for the current PeopleTools release in My Oracle Support.

Chapter 3

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

This chapter discusses:

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

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

This section applies if you are running PeopleSoft FSCM 9.2 on the DB2 z/OS database platform and want to run SQR and COBOL processes on the z/OS server that require reading and writing of external files.

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

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

Task 3-1: Allocating Data Sets on the z/OS File System

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

All like processes share the same JCL Shells. An invalid file disposition in the process can prevent that process and all the processes from executing successfully. For this reason Oracle recommends using DISP=SHR in the JCL Shells, as discussed later in this document. DISP=SHR presumes that the data set exists at the time a job execution is initiated. If the data set does not exist, a JCL error occurs. The PDS requires only the root data set, for it the individual member does not need to exist. If the member does not exist, it is automatically created by the z/OS file management system.

You should allocate partitioned data sets that include the following attributes:

- The record format should be variable block (RECFM=VB).
- The record length should be slightly wider than the record length of the file, which is defined within the SQR itself.

Refer to the table below for SQR LRECL definitions.

- The data set name type should be PDS (DSORG=PO).

The following is an example of a JCL statement to allocate a PDS:

```

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

The following table details the information that you can use to both pre-allocate the data set and modify the JCL Shells for PeopleSoft FMS in the next section, Modifying the JCL Shells.

PeopleSoft Product	SQR or COBOL Program Name	DD Card Name ¹	Data Set Type / Record Format / Record Length	Member Name or Random Name ²
General Ledger	GLS7500	Defined and entered by the customer	PDS/VB/850	Specific Member name (OUTPUT FILE)
Treasury	ECIN0001	Defined and entered by the customer.	PDS/VB/500	Specific Member name (OUTPUT FILE)

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

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

The following tables detail the information that you can use to both pre-allocate the data set and modify the JCL Shells for PeopleSoft SCM products in the next section, Modifying the JCL Shells.

PeopleSoft Inventory:

SQR or COBOL Program Name	DD Card Name ¹	Data Set Type / Record Format / Record Length	Member Name or Random Name ²
INS9050	INCOUNT	PDS/VB/250	Specific Member name (INPUT FILE)
INS9051	INCOUNT	PDS/VB/250	Specific or Random Member name (OUTPUT FILE)
INS9080	INFCST	PDS/VB/250	Specific or Random Member name (OUTPUT FILE)
INS9081	INFCST	PDS/VB/250	Specific Member name (INPUT FILE)

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

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

PeopleSoft Manufacturing:

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

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

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

Task 3-2: Modifying the JCL Shells

The PeopleSoft release delivers three shells. One for COBOL, SHELCBL.JCT, and two for SQRs, SHELSQRF.JCT and SHELSQRP.JCT. The shells are located in the <PS_HOME>/appserv/prcs/shelljcl directory in UNIX System Services.

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

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

```
//*CTTRANS DD DSN=&SQRHLQ..LINKLIB,DISP=SHR
//SQDIR DD DSN=&SQRHLQ..ERRDAT,DISP=SHR
//SI DD DSN=&PSHLQ..SQRINC,DISP=SHR
//SYSTEM DD SYSOUT=*
//SYSOUT DD SYSOUT=*
//DBGLOG DD SYSOUT=*
//SYSTMPDB DD UNIT=WORK,SPACE=(TRK,25) VS1 ONLY
//SP DD DSN=&PSHLQ..SQRSRC(&SQRID),DISP=SHR
//* ADD DD STATEMENTS HERE FOR LIBRARY CONCATENATION
//*
//SYSTEM DD SYSOUT=*
//*
%SQROUT%
//*
//SQRPOST DD DSN=&SQRHLQ..DAT(POSTSCRI),DISP=SHR
//SYSERR DD SYSOUT=*
//SYSTSIN DD DSN=&PSHLQ..PARMLIB(NOPARMS),DISP=SHR
//SYSIN DD DSN=&PSHLQ..PARMLIB(&PRMID),DISP=SHR
//SQRINI DD DSN=&PSHLQ..SQRSRC(PSSQRINI),DISP=SHR
//INSQR1 DD DSN=&PSHLQ..INSQRPDS(A%INSTANCE%),DISP=SHR
//INSQR2 DD DSN=&PSHLQ..INSQRPDS(INFILE),DISP=SHR
//
PEND
//*
```

```
//%PRCSNAME% EXEC SQRPROC,SQRID=%PRCSNAME%  
//SYSTSIN DD *  
DSN SYSTEM(%DB2SUB%)  
RUN PROG(SQR) -  
PLAN(SQRPLAN) -  
LIB('SYS5.SQR614B1.SQR.UNICODE.LOAD') -  
%SQRFLAGS%  
END  
/*  
//SYSIN DD *  
%SQRPARMS%  
/*
```

If you have already configured a process scheduler, the shells that your configuration uses can be found in:
<PS_CFG_HOME>/appserv/prcs/<process scheduler name>/shelljcl.

Note. You must stop and restart the process scheduler for the edits in the JCL shells to take effect.

Chapter 4

Setting Up Mobile Approvals

This chapter discusses:

- Prerequisites
- Granting Security to Users
- Configuring Mobile Approvals

Prerequisites

You can use Mobile Approvals to access the pending approvals. However before accessing the pending approvals, complete the approval setup for each of these transactions.

Task 4-1: Granting Security to Users

The administrator is granted access to the HMAP_MBL_SETUP component in the menu HMAP_MOBILE_APPROVALS_FL to set up the Mobile Approval Options.

There are two Permission Lists delivered:

Mobile Approval Type	Description
EOAW2000 – Mobile Approvals Administrator	This permission list allows user to access the setup page.
EOAW2200 – Mobile Application Platform	This permission list allows user to access the approval application.

Task 4-2: Configuring Mobile Approvals

This section discusses:

- Understanding Configuring Mobile Approvals
- Prerequisites
- Adding the Approvals Fluid Role
- Setting Mobile Approval Options
- Deploying the Mobile Approval IB Service
- Validating FSCM REST Services

- Verifying Inactive Service Operations
- Verifying Active Service Operations
- Performing Local Node Introspection and Deployment
- Performing MAP File Synchronization
- Activating Push Notification

Understanding Configuring Mobile Approvals

Perform all of the procedures in this section, in the order given, to configure the Mobile Approvals.

Prerequisites

Before you begin, ensure that you follow these instructions in the order given:

1. Select PeopleTools, Integration Broker, Configuration, Gateways, and follow these steps to validate the local gateway setup:
 - a. Verify that the correct local gateway URL is displayed in the URL field, and the Local Gateway check box is selected.
 - b. Verify that all local gateway connectors are displayed in the Connectors group box.
 - c. Verify that you are able to ping the gateway successfully (status displayed as *Active*) when you click the Ping Gateway button.
 - d. Click the Gateway Setup Properties link to open the PeopleSoft Node Configuration page where you can verify that the App Server URL field and the Node Name field (PeopleSoft Nodes group box) display the default value.
 - e. On the PeopleSoft Node Configuration page, click the Advanced Properties Page link to verify if the keystore location and password are set up.
2. Select PeopleTools, Integration Broker, Configuration, Service Configuration, and click the Setup Target Locations link to verify that the correct REST target location URL is displayed.
3. Select PeopleTools, Integration Broker, Integration Setup, Nodes, and:
 - a. On the Node Definitions page, verify that the node password is set for the default local node.
 - b. On the Connectors page, verify that the ping is successful when you click the Ping Node button.
 - c. On the Portal page, verify that the Local Node check box is selected, and content URI text and portal URI text contain the default local node value.
 - d. Search for the node ANONYMOUS, and verify that the default User ID is set up.
4. The browsers with minimum version to be used for Fluid User Interface access are Internet Explorer 11, Mozilla Firefox 24, and Google Chrome 35.
5. Perform MAP file synchronization to synchronize PeopleTools layouts to Integration Gateway. To synchronize:
 - a. Select PeopleTools, Integration Broker, Integration Network WorkCenter, and click the MAP File Synchronization link under the Configuration folder.
 - b. On the MAP File Synchronization page, click the Synch button to initiate webserver to make a REST call to retrieve files.
 - c. Click the View Gateway Files link to view the status of files residing on the gateway. Verify that the required layouts, templates, and images are listed here.
6. Validate the layout PT_MAPFLUID. To validate:

- a. Select PeopleTools, Mobile Application Platform, Layout Designer, and search for the layout PT_MAPFLUID.
- b. On the Layout page, click the View Initialization URL link to view and copy the URL.
- c. Paste the copied URL in a browser and verify that it works.

Task 4-2-1: Adding the Approvals Fluid Role

Before configuring Mobile Approvals, you need to add the role Approvals Fluid. This role is assigned to every user who needs to access the Mobile Approvals application.

To add the Approvals Fluid role:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. Enter the user ID, for example, *MGR1*.
3. On the User Profiles page, select the Roles tab.
4. In the User Roles area, add a new row and enter *Approvals Fluid* in the Role Name field.

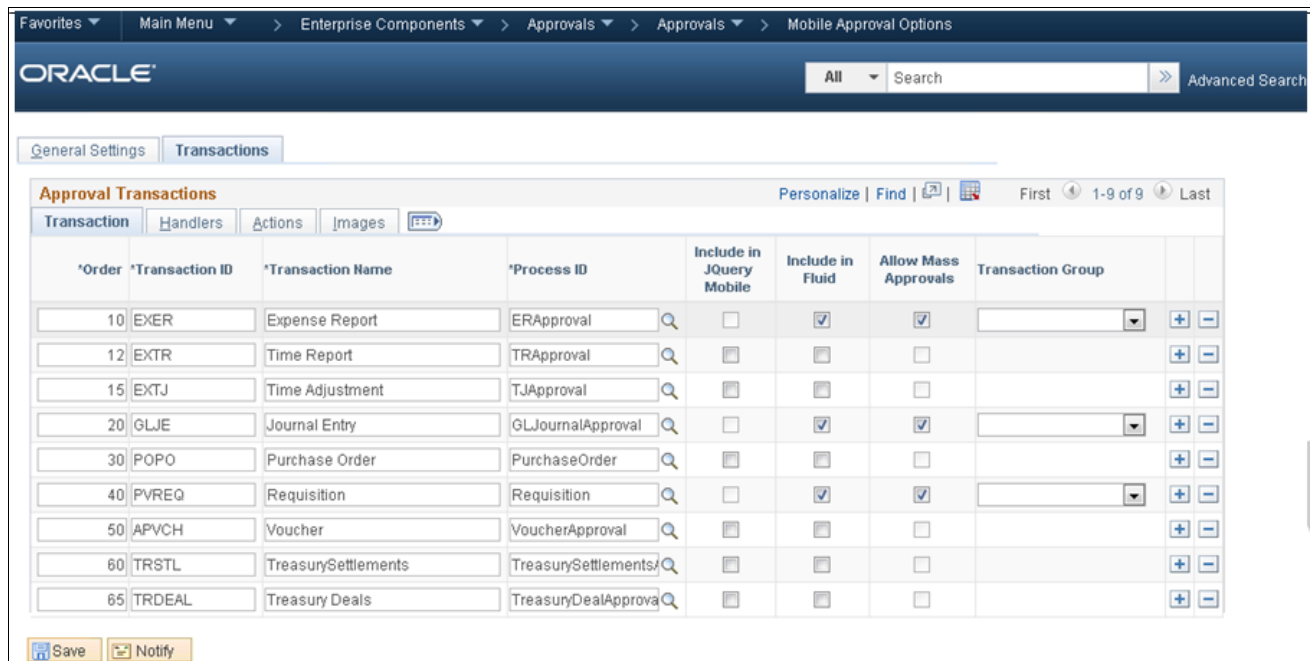
Continue with the remaining procedures in this task, in the order given.

Task 4-2-2: Setting Mobile Approval Options

To set up mobile approval options:

1. Select Main Menu, Enterprise Components, Approvals, Approvals, Mobile Approval Options.

The Mobile Approval Options page appears as shown in the following example:



Mobile Approval Options page

2. On the Transactions tab, select the Include in Fluid check box for each transaction that is to be included in Mobile Approvals.

When Include in Fluid check box is selected, the corresponding Transaction Group drop-down list gets enabled.

3. (Optional) Select a group, for example *Full/Part Time Status*, from the Transaction Group drop-down list, if you want a transaction to appear as part of a group.

New transaction groups can be created on the General Settings tab. To create:

- a. Select General Settings tab. In the Transactions Group area, add a new row.
 - b. Enter group ID, description and image in the respective fields.
 - c. Click Save.
4. Select the Allow Mass Approvals check box, if you want to approve more than one type of transaction at a time.
 5. Click Save.

Task 4-2-3: Deploying the Mobile Approval IB Service

To deploy mobile approval IB service:

1. Open the Application Designer.
2. Open the Application Engine program HMAP_MAPUPD.
3. Select Edit, Run Program, and click OK.

Task 4-2-4: Validating FSCM REST Services

To validate FSCM REST services:

1. Select PeopleTools, Integration Broker, Integration Setup, Services.
The Services- Search page opens.
2. Select the REST Service check box, and search.
3. In the search result, verify that the services HMAP_APPRO_MAIN_FIN1_MAP and HMAP_APPRO_DTL_FIN1_MAP exist.

Task 4-2-5: Verifying Inactive Service Operations

To verify:

1. Select PeopleTools, Integration Broker, Integration Setup, Services.
2. In the Services page, verify that all service operations of the service HMAP_APPROVAL are inactive, as shown in the following example:

The screenshot displays the Oracle PeopleTools interface for the HMAP_APPROVAL service. The breadcrumb navigation shows: PeopleTools > Integration Broker > Integration Setup > Services. The service name is HMAP_APPROVAL, with a description of 'Approval Service'. The 'REST Service Type' checkbox is checked, and 'Is Provider' is unchecked. The 'Owner ID' is set to 'Enterprise Components' and the 'Namespace' is 'http://xmlns.oracle.com/enterprise/tools/service'. Below the service details is a section for 'Link Existing Operations' with a table of 'Existing Operations'. The table has columns for 'Operation', 'Message Links', 'Alias', 'Active', and 'Operation Type'. All operations listed are inactive (checkboxes are unchecked) and have a 'Synch' operation type.

Operation	Message Links	Alias	Active	Operation Type
HMAP_APPROVAL_DETAIL_ELM_GET.v1		HMAP_APPROVAL_DETAIL_ELM	<input type="checkbox"/>	Synch
HMAP_APPROVAL_DETAIL_FIN_GET.v1		HMAP_APPROVAL_DETAIL_FIN	<input type="checkbox"/>	Synch
HMAP_APPROVAL_DETAIL_HCM_GET.v1		HMAP_APPROVAL_DETAIL_HCM	<input type="checkbox"/>	Synch
HMAP_APPROVAL_MAIN_ELM_GET.v1		HMAP_APPROVAL_MAIN_ELM	<input type="checkbox"/>	Synch
HMAP_APPROVAL_MAIN_FIN_GET.v1		HMAP_APPROVAL_MAIN_FIN	<input type="checkbox"/>	Synch
HMAP_APPROVAL_MAIN_HCM_GET.v1		HMAP_APPROVAL_MAIN_HCM	<input type="checkbox"/>	Synch

HMAP_APPROVAL Service Page

Task 4-2-6: Verifying Active Service Operations

To verify that all the approvals related service operations are active:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operation.
2. On the Service Operations search page, search for and select the approval related service operation *EOAW_STATUS_MONITOR1_MAP_GET*.

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

General | Handlers | Routings

Status PeopleSoft Restricted Service. Read-only mode.

Service Operation EOAW_STATUS_MONITOR1_MAP_GET

REST Method GET

***Operation Description** EOAW_STATUS_MONITOR1_MAP

Operation Comments Generated Service Operation for Layout EOAW_STATUS_MONITOR1_MAP

Owner ID Enterprise Components

Operation Alias EOAW_STATUS_MONITOR1_MAP

User/Password Required

***Req Verification** None

[Service Operation Security](#)

Used with Think Time Methods

REST Resource Definition

REST Base URL http://slc08bqy.us.oracle.com:8000/PSIGW/RESTListeningConnector/E92R0209/EOAW_STATUS_MONITOR

URI Template Format Example: weather/{state}/{city}?forecast={day}

Index	Template	Validate	Build
1	{PAGE_ID}/{LAYOUT_ID}	Validate	Build
2	{PAGE_ID}/{LAYOUT_ID}/{ProcessID}/{ThreadID}/{ThemeStyle}/{MonitorMode}	Validate	Build

Document Template: EOAW_STATUS_MONITOR1_MAP.map | [View Message](#)

Default Service Operation Version

***Version** v1 Default Active

Version Description EOAW_STATUS_MONITOR1_MAP

Version Comments Generated Service Operation Version for Layout EOAW_STATUS_MONITOR1_MA

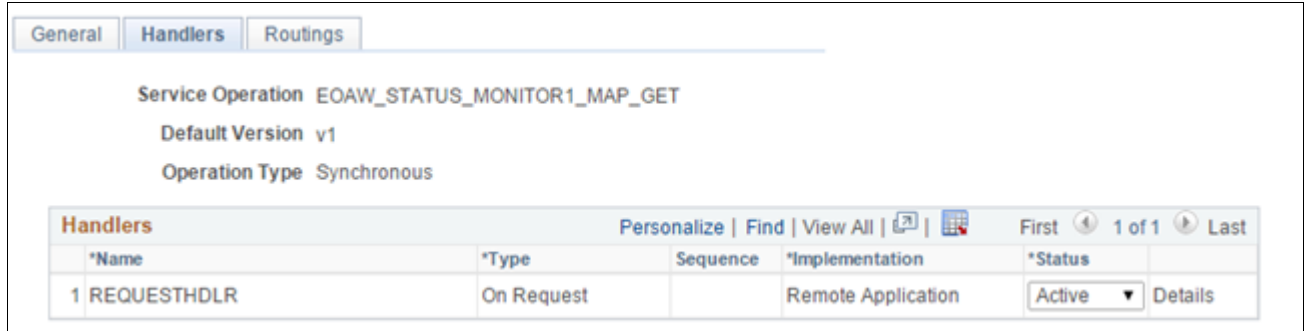
Routing Status

Any-to-Local	Exists
Local-to-Local	Does not exist

EOAW_STATUS_MONITOR1_MAP_GET- General Page

3. In the Default Service Operation Version group box, verify that the Active check box is selected.

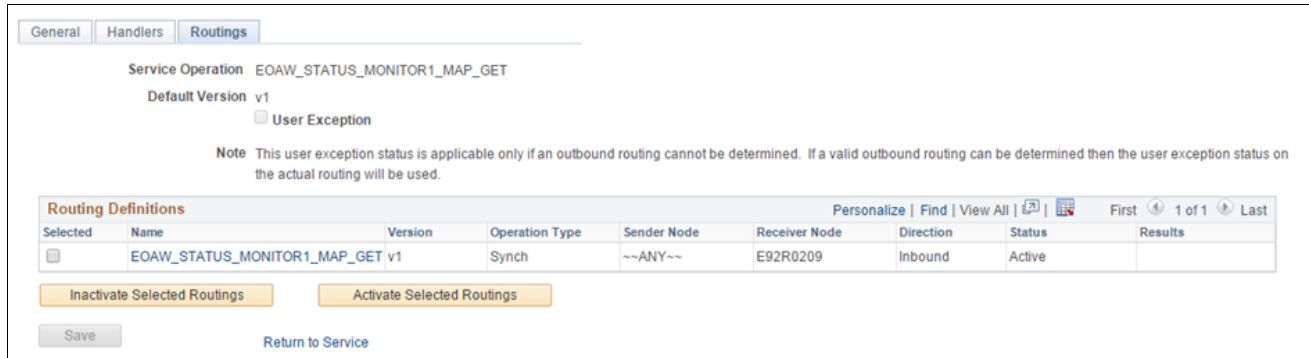
4. Select the Handlers tab to access the Handlers page, and verify that the handlers are active as shown in the following example:



EOAW_STATUS_MONITOR1_MAP_GET- Handlers Page

5. On the Routings page, in the Routing Definitions group box, click on each routing to open the IB Routing Definitions page where you can verify the status.

The following example shows the Routings page:



EOAW_STATUS_MONITOR1_MAP_GET- Routings Page

6. Repeat steps 2-5 for the following approval service operations:

- EOAW_STATUS_MONITOR1_MAP_POST
- EOAW_MOBILE_APPROVAL
- HMAP_APPRO_DTL_FIN1_MAP_GET
- HMAP_APPRO_DTL_FIN1_MAP_POST
- HMAP_APPRO_MAIN_FIN1_MAP_GET
- HMAP_APPRO_MAIN_FIN1_MAP_POST
- HMAP_APPRO_CONT_INFO1_MAP_GET
- HMAP_APPRO_CONT_INFO1_MAP_POST
- HMAP_COMMON_DTL_SBP1_MAP_GET
- HMAP_COMMON_DTL_SBP1_MAP_POST
- PT_MAPFLUID1_MAP_GET
- PT_MAPFLUID1_MAP_POST
- PTIMAGE_GET
- SIGNON1_MAP_GET

- SIGNON1_MAP_POST
-

Note. For restricted and generated service operations, the Service Operations page (main component) cannot be saved. The IB Routing Definitions page, where you verify the routing status, can be saved though.

Task 4-2-7: Performing Local Node Introspection and Deployment

To perform local node introspection and deployment:

1. Select PeopleTools, Integration Broker, Integration Network WorkCenter.
2. Under the Administration folder, click the link Introspection and Deployment.
3. In the Search for Items- Introspection/Deployment page, select the Service option to enable the Service field.
4. Enter *HMAP_APPROVAL* in the Service field, and search.

The service *HMAP_APPROVAL* gets displayed in the Select Items to Process group box.

5. Select the check box for the service *HMAP_APPROVAL*, and click Continue.
6. On the Target page, select the option Local Node, and click Continue.
7. On the Introspection/Deployment page, click the Introspect button.

- On the Introspection Results page, select all the service operations that have the check boxes enabled, as shown in the following example:

Introspection Results

Node List Find First 1 of 1 Last

Node EP920TS1

Operation List Personalize | Find | [Print] [Grid] First 1-8 of 8 Last				
Select	Operation	Version	Information	Deployment Action
<input type="checkbox"/>	HMAP_APPROVAL_DETAIL_ELM_GET	v1	Integration on Operation HMAP_APPROVAL_DETAIL_ELM_GET Version v1 contains no errors.	No deployment action necessary.
<input checked="" type="checkbox"/>	HMAP_APPROVAL_DETAIL_FIN_GET	v1	Local operation REST URL does not match remote provider target URL http://slc08btf.us.oracle.com:8000/PSIGW/RESTListeningConnector/EP920TS1/HMAP_APPRO_DTL_FIN1_MAP.v1/.	Fix local operation URL to match REST provider target location.
<input checked="" type="checkbox"/>	HMAP_APPROVAL_DETAIL_FIN_GET	v1	Operation/Version is not active.	Activate local Operation/Version.
<input type="checkbox"/>	HMAP_APPROVAL_DETAIL_HCM_GET	v1	Integration on Operation HMAP_APPROVAL_DETAIL_HCM_GET Version v1 contains no errors.	No deployment action necessary.
<input type="checkbox"/>	HMAP_APPROVAL_MAIN_ELM_GET	v1	Integration on Operation HMAP_APPROVAL_MAIN_ELM_GET Version v1 contains no errors.	No deployment action necessary.
<input checked="" type="checkbox"/>	HMAP_APPROVAL_MAIN_FIN_GET	v1	Local operation REST URL does not match remote provider target URL http://slc08btf.us.oracle.com:8000/PSIGW/RESTListeningConnector/EP920TS1/HMAP_APPRO_MAIN_FIN1_MAP.v1/.	Fix local operation URL to match REST provider target location.
<input checked="" type="checkbox"/>	HMAP_APPROVAL_MAIN_FIN_GET	v1	Operation/Version is not active.	Activate local Operation/Version.
<input type="checkbox"/>	HMAP_APPROVAL_MAIN_HCM_GET	v1	Integration on Operation HMAP_APPROVAL_MAIN_HCM_GET Version v1 contains no errors.	No deployment action necessary.

Deploy

Introspection Results Page

- Click Deploy.

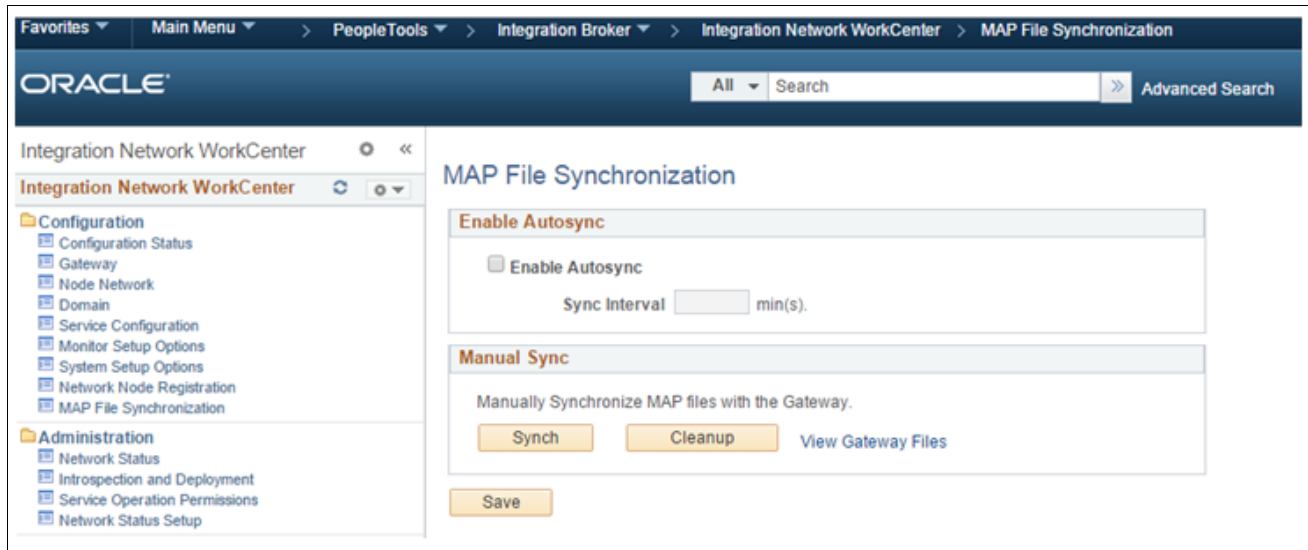
Task 4-2-8: Performing MAP File Synchronization

Perform MAP file synchronization to synchronize Mobile Approval layouts to Integration Gateway.

To synchronize:

- Select PeopleTools, Integration Broker, Integration Network WorkCenter.
- Under the Configuration folder, click the MAP File Synchronization link.

3. On the MAP File Synchronization page, click the Synch button as shown in the following example:



MAP File Synchronization Page

Task 4-2-9: Activating Push Notification

You can activate Push Notification for each transaction.

To activate:

1. Select Main Menu, Enterprise Components, Approvals, Approvals, Transaction Registry, and search for the process ID *Requisition*.

- Expand the Notification Options area, and select the Push check box as shown in the following example:

The screenshot shows the Oracle PeopleTools interface for configuring 'Register Transactions'. The breadcrumb trail is: Favorites > Main Menu > Enterprise Components > Approvals > Approvals > Transaction Registry. The page title is 'Register Transactions'. The configuration fields are as follows:

- Process ID: Requisition
- *Description: Requisition
- Owner ID: eProcurement
- *Cross Reference Table: PV_REQ_AW
- Worklist Prefix: (empty)

The **Notification Options** section is expanded and contains:

- Enable Notifications: Email, Worklist, Push
- *Notification Strategy: Online Processing
- Use Email Approvals:
- Form Generator Package Root: SCM_PV EMC
- Form Generator Class Path: OUTBOUND:formGenerator

Below this section are two collapsed areas: **Internal URL Definition** and **External URL Definitions**.

Activate Push Notification

- Click Save to save the changes.

See the product documentation for PeopleTools: System and Server Administration for your new release for information about Push Notification.

Chapter 5

Configuring Global Search Using Oracle Secure Enterprise Search (SES)

This chapter discusses:

- Understanding Configuring Global Search Using Oracle Secure Enterprise Search
- Prerequisites
- Defining New Roles for Global Search
- Defining Search Group Display
- Verifying the Setup of Portal Node in PeopleSoft FSCM
- Identifying FSCM Search Definitions for Attachments
- Deploying and Indexing Delivered Search Definitions
- Upgrading File Attachments

Understanding Configuring Global Search Using Oracle Secure Enterprise Search

PeopleSoft Search Framework is a PeopleSoft PeopleTools owned indexed search technology that relies on the Oracle Secure Enterprise Search (SES) engine by way of PeopleSoft Integration Broker. PeopleSoft Integration Broker provides the interface between PeopleSoft Search Framework and the Oracle SES engine to deploy the search definitions, build the indexes, and return the search results. In addition to the replacement of product specific Verity functionality with SES, PeopleSoft Financial/Supply Chain Management 9.2 supports new search capability within selected components like the Search Pages, as well as Global Search in the home page. Using Global Search functionality users can do unstructured keyword search for the selected components included in the 'Procure to Pay' business process.

Important! Before installing Oracle's Secure Enterprise Search (SES) we highly recommend that you review our deployment and sizing recommendations provided in "Oracle Secure Enterprise Search Deployment Considerations for PeopleSoft 9.2" (Document ID: 1684035.1) found on My Oracle Support. This article provides information regarding the essential hardware for SES and information to help ensure capacity for peak concurrent usage of your PeopleSoft 9.2 environment. Failing to follow these recommendations can impact the performance and stability of your PeopleSoft 9.2 environment.

See *PeopleSoft FSCM: Applications Fundamentals*.

Prerequisites

This section describes the required setup for SES to enable the Global Search functionality within the Financial/Supply Chain Management product line.

Important! You should *only* perform these steps if you have completed the tasks discussed in the PeopleTools installation chapter, "Configuring Integration Between PeopleSoft PeopleTools and Oracle SES," for your new release.

See the PeopleTools Installation guide for your database platform and current PeopleTools release, "Configuring Integration Between PeopleSoft PeopleTools and Oracle SES."

See Also

PeopleTools: PeopleSoft Search Technology

Task 5-1: Defining New Roles for Global Search

Sample roles are provided for the Global Search and the Search Pages. You will need to determine which users will need access to these roles for searching. Your PeopleSoft administrator needs to complete the steps below to add roles.

To add the roles for search:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. On the User Profiles page, select the Roles tab.

3. In the grid, add the roles shown in the following table, appropriate to the user who can access the Global Search:

Global Search Category	ROLE	Permission List
Accounts Payable	Search Accounts Payable	EPSR1040
Asset Management	Search Asset Management	EPSR1030
Catalog Items	Search Catalog	EPSR1080
Expenses	Search Expenses	EPSR1050
General Ledger	Search General Ledger	EPSR1060
Procure to Pay	Search PtoP	EPSR1000
Purchasing/Procurement	Search Procurement	EPSR1020
Strategic Sourcing	Search Strategic Sourcing	EPSR1010
Supplier Information	Search Supplier Information	EPSR1080
Supplier Contracts Document	Search Authored Documents	EPSR1090

In addition there are several PeopleTools roles created for users who access the Search Definitions and are allowed to run and schedule the search indexes. These roles are:

- Search Server — required only for the user setup as the Callback user for the Search Instance
- Search Query Administrator — required to access Queries associated with all Search Definitions, this is required for the Callback user as well as for any user who will need to modify these queries.
- Search Administrator — required for any user who will be allowed to submit jobs for indexing.
- Search Developer — required for any user who will be granted access to the design of Search Definitions

See *PeopleTools: PeopleSoft Search Technology*.

Task 5-2: Defining Search Group Display

This section discusses:

- Understanding Search Group Display
- Adding the Search Group to the Home Page Search Context
- Enabling the Global Search Box in the Page Header

Task 5-2-1: Understanding Search Group Display

In order for the Search Group to display in the Global Search Header and drop-down list, you must add the Search Group to the Home Page Search Context and enable the global search box in the header.

Task 5-2-2: Adding the Search Group to the Home Page Search Context

To add the Search Group to the Home Page Search Context:

1. Select PeopleTools, Search Framework, Administration, Define Search Context.
2. On the Define Search Context search page, select *Home Page* from the Context Type drop-down list, and then click Search.
3. Add the Search Groups, as appropriate for your installation, and other values in the grid as needed.

This table lists names, sequence order, and descriptions for the fields and values in the Define Search Context page, for example for the Home Page:

Default	Sequence	Search Category Name	Description
Y	1	EP_PROCURE_TO_PAY	Procure to Pay
N	2	EP_SOURCING	Strategic Sourcing
N	3	EP_PROCUREMENT	Purchasing/Procurement
N	4	EP_ASSETS	Asset Management
N	5	EP_PAYABLES	Accounts Payable
N	6	EP_EXPENSES	Expenses
N	7	EP_GENERAL_LEDGER	General Ledger
N	8	EP_VENDORS	Supplier Information
N	9	EP_CATALOG_ITEMS	Catalog Items
N	10	EP_CS_AUTHORED_DOC	Supplier Contract Documents
N	11	PTPORTALREGISTRY	Menu

4. Click Save.

Task 5-2-3: Enabling the Global Search Box in the Page Header

To enable the Global Search box in the page header, perform the following steps:

1. Select PeopleTools, Portal, General Settings.
2. Select the Display Global Search in Header check box.
3. Click Save.

Task 5-3: Verifying the Setup of Portal Node in PeopleSoft FSCM

To verify the Portal Node in the PeopleSoft FSCM environment:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the Portal node *PSFT_EP*.
The Node Definitions page appears.
3. On the Node Definitions page, select the Portal tab.
4. On the Portal page, in the Content URI field, verify that you have entered an address that corresponds to your PeopleSoft FSCM environment.
For example: *http://<server>:<port>/psc/pshome/*
5. In the Portal URI field, verify that you have entered an address that corresponds to your PeopleSoft FSCM environment.
For example: *http://<server>:<port>/psp/pshome/*
6. Click Save.
7. Repeat steps 1 through 6 for the ERP Node.

See the product documentation for PeopleTools: PeopleSoft Integration Broker Administration for more information about Integration Broker setup.

Task 5-4: Identifying FSCM Search Definitions for Attachments

This step contains details on FSCM search definitions that can search for attachments.

Search Attachments are documents that can be included in a Search Index. Depending on the application and setup, attachments can be stored on the FTP server, the SFTP server, or in the database. When attachments are to be included in a search index, they must be defined on the Attachment Properties tab of the Search Definition page. You can also find pre-defined attachments on the Search Definition page.

See the product documentation for PeopleTools: PeopleSoft Search Technology for more information on search definitions and attachments.

This table illustrates the Financials and Supply Chain search definitions that can search for attachments, along with the locations where they are used:

Search Definition	Description	Used In
EP_AM_ASSET	Assets	Global / Search Pages
EP_AP_VENDOR	Suppliers	Global / Search Pages
EP_AP_VOUCHERS	Vouchers	Global / Search Pages
EP_CS_DOC_ADHOC	Adhoc Documents	Search Content in Supplier Contract Mgmt
EP_CS_DOC_CONTRACTS	Contract Documents	Search Content in Supplier Contract Mgmt
EP_CS_DOC_PURCHORDRS	Purchase Order Documents	Search Content in Supplier Contract Mgmt

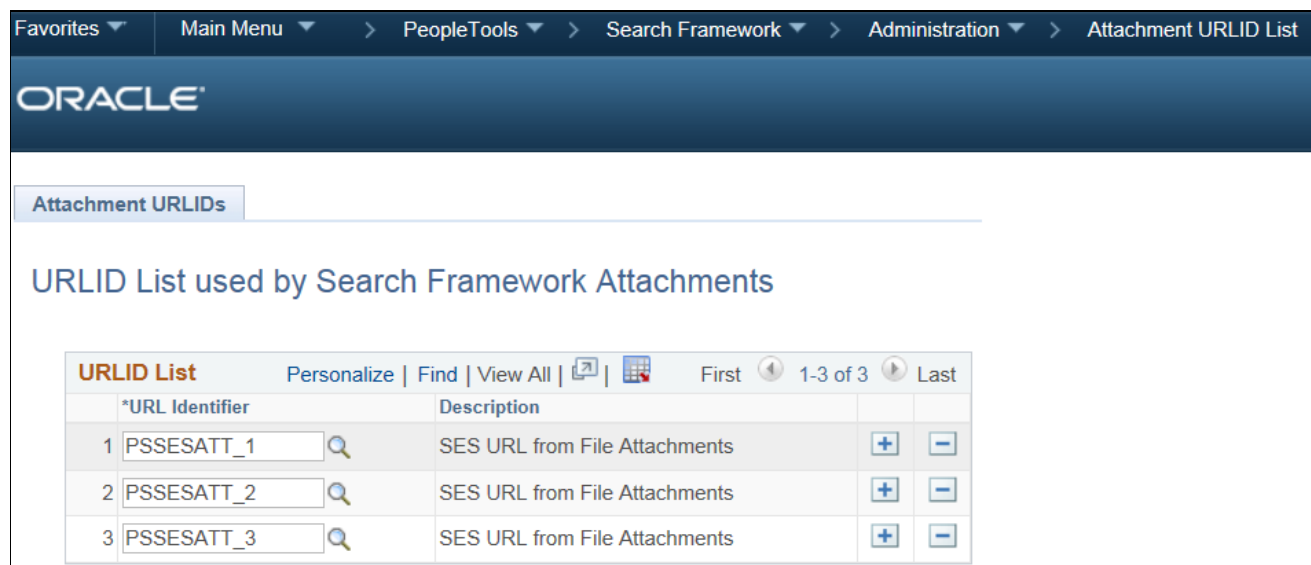
Search Definition	Description	Used In
EP_CS_DOC_SOURCING	Sourcing Event Documents	Search Content in Supplier Contract Mgmt
EP_PO_CONTRACTS	PO Contracts	Global / Search Pages
EP_PO_PURCHASE_ORDERS	Purchase Orders	Global / Search Pages
EP_PO_REQUISITIONS	Requisitions	Global / Search Pages
EP_SS_EVENTS	Sourcing Events	Global / Search Pages

Before indexing, verify that the URLID list is not blank. Attachments will *not* be indexed if the URLID list is blank.

To verify:

1. Select PeopleTools, Search Framework, Administration, Attachment URLID List.

The Attachments URLIDs List page appears as shown in the following example:



Attachments URLIDs List page

- Verify that the attachment URL IDs defined in the File Attachment Architecture (SES URL Equivalent column), as shown in the following example, appear on this list:

The screenshot shows the Oracle Administer File Attachments interface. At the top, there are navigation tabs: Favorites, Main Menu, Set Up Financials/Supply Chain, Common Definitions, File Attachments, and Administer File Attachments. Below the Oracle logo is a search bar with 'All' and 'Search' options. The main heading is 'Administer File Attachments'. There are three buttons: 'Add URL Server', 'Add FTP Server', and 'Add Database Server'. A dropdown menu shows '*Pick Active Server' with '3' selected. Below this is a table titled 'File Attachment Servers' with the following data:

ID	Type	*Login	*Password	Confirm Password	*Server/Record Name/URL Id	Path	SES URL Equivalent
1	FTP	ftpuser	*****	*****	10.244.0.253	FSCM91	PSSESATT_1
2	FTP	ftpuser	*****	*****	pf-sun07	fscm90	PSSESATT_2
3	DB				PV_ATT_DB_SRV		PSSESATT_3
4	URL				COMMON_ATT_S_RI		

Verify Attachment URL IDs

If URL IDs are missing, add those.

See [Upgrading File Attachments](#) for instructions to add URL IDs and for information on File Attachment Architecture.

Note. The Attachments URLIDs list is used by the Search Framework to know which attachments will be available to SES.

Task 5-5: Deploying and Indexing Delivered Search Definitions

This section discusses:

- Deploying Indexes
- Building an Index

Task 5-5-1: Deploying Indexes

After the indexes are defined, you need to deploy the search definition. You must also deploy the search categories that contain more than one index. Search categories with only one index, which have the same name as the search definitions, are automatically deployed.

Warning! The Deploy Search Definitions page also allows you to delete search definitions. Deleted search definitions are not reversible.

The process of deploying and building search definitions defined for Global Search also automatically enables the Keyword Search within Search Pages for the components associated on the Search Definition.

Note. If your environment does not contain licenses for all products within the Procure to Pay search category you will need to deploy the underlying indexes for the product. However, you do not need to build the indexes. As an alternative, you can customize the Procure to Pay Search Category to remove Search Definitions related to products that are not licensed.

To deploy a search definition:

1. Select PeopleTools, Search Framework, Administration, Deploy\Delete Object to display the Deploy Search Definitions page.
2. Select the check box in the left column.
3. Scroll to the bottom of the Deploy Search Definitions page, and click the Deploy button.
4. Select the Search Categories tab.

Confirm that the category with the same name as the search definition is automatically deployed.

5. Global Search Categories generally contain more than one search definition. As such, they must be deployed independently by following the same steps for a search definition except using the Search Categories tab to deploy. Deploying these search categories can occur before or after individual search definitions are indexed. For example, *EP_PROCURE_TO_PAY* is a Search Category that contains multiple search definitions. It must be deployed from the Search Categories tab before it is available in the Global Search bar.

See *PeopleTools: PeopleSoft Search Technology*, "Administering Search Definitions and Search Categories."

Task 5-5-2: Building an Index

In this section you use the Schedule Search Index page to build an index.

To build an index:

1. Select PeopleTools, Search Framework, Administration, Schedule Search Index to display the Schedule Search Index page.
2. Enter the Search Definition name in the Search Definition field.
3. Select Incremental or Full, type of Index Build.
4. Select Language depending on the database.
5. Click Run and enter a Process Scheduler.

See the product documentation for PeopleSoft FSCM: Applications Fundamentals for more information about the Build Search Index page.

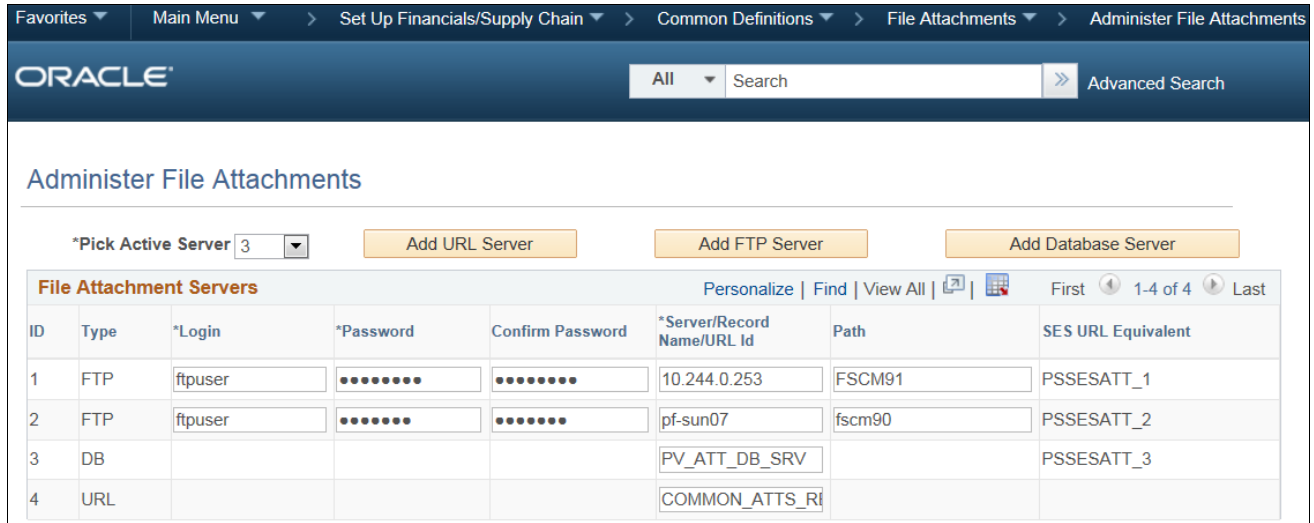
Task 5-6: Upgrading File Attachments

The file attachment architecture is enhanced to provide interfaces for existing legacy attachments for use in definition for PeopleTools Search Framework indexes. In order for attachments to work properly in Search Framework, the definitions for database and FTP or SFTP based file attachments are linked to a Tools URL definition. You can add links in the architecture to define what is required. You can follow the steps listed, to make the system ready for attachment processing in Search Indexes.

If your attachments are all stored within the database this procedure is not required. For any existing non-URL (FTP) based file attachment setup which is crawled, there is a URL definition created in the SES URL Equivalent column on the Administer File Attachment page. The corresponding URLs are automatically set up in PeopleSoft PeopleTools. You need to verify that the file attachments for FSCM are set up.

To set up special URLs for File Attachment Architecture:

1. Select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments. The Administer File Attachments page appears as shown in the following example:



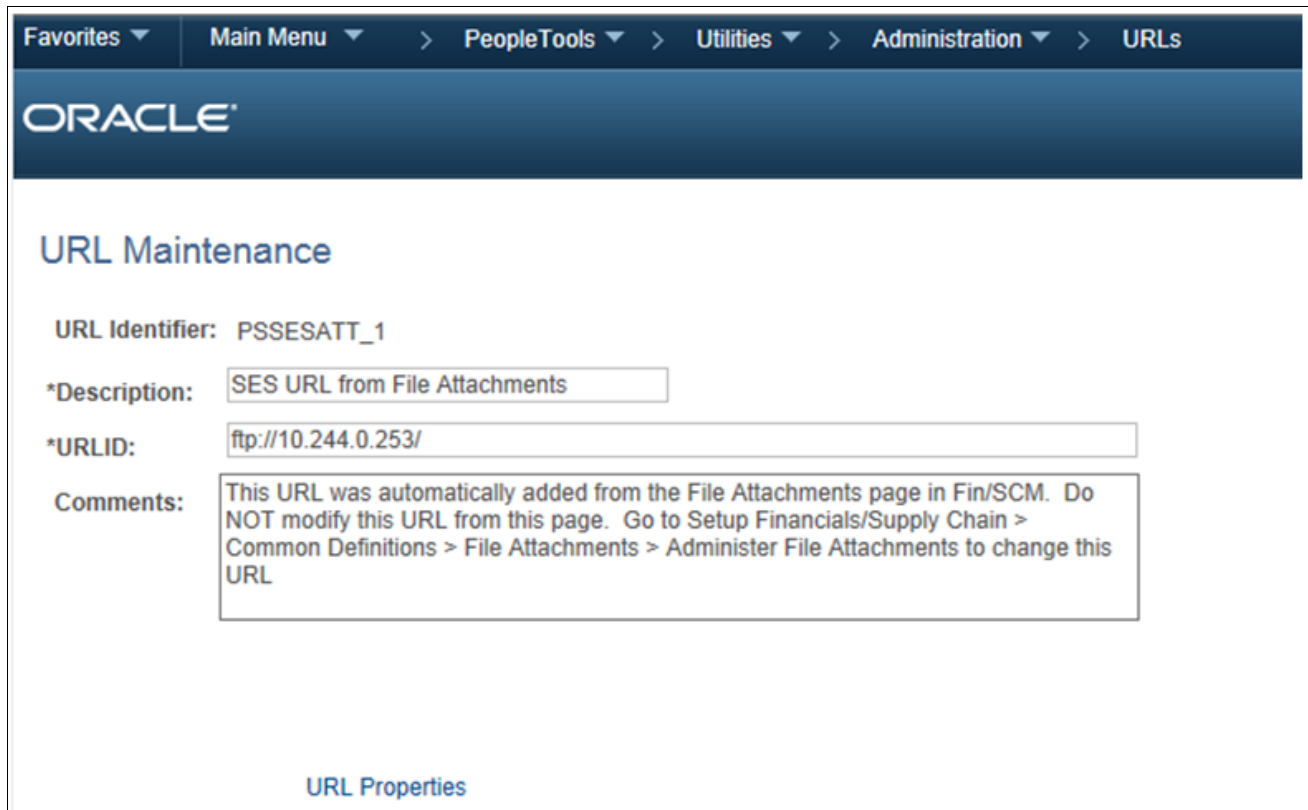
Administer File Attachments page

The page displays the definitions that you have created. Make some small change on the page, for example; change the active server or add a space to the end of the login name, and save it. If required, you can revert the change later.

Note. The SES URL Equivalent column is populated with default URL values.

2. Select PeopleTools, Utilities, Administration, URLs, to create PeopleSoft URL definitions.

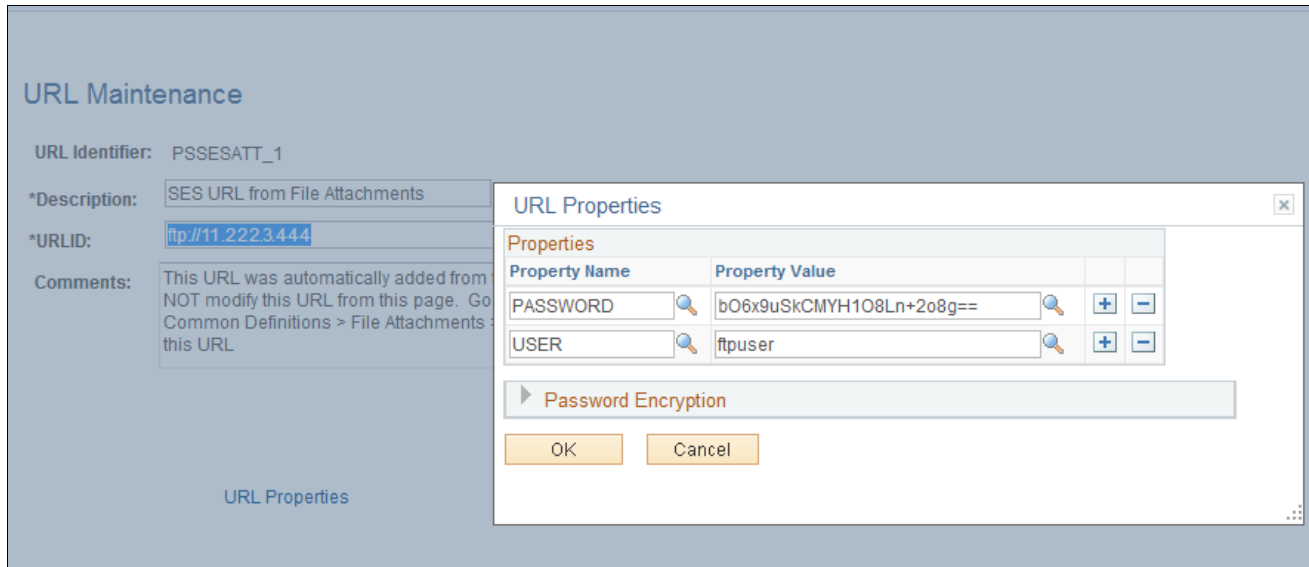
Verify that in the PeopleSoft URL definitions page, the URLs are created automatically. The following example shows a URL definition page:



URL Maintenance page

These URLs should be created with *PSSESATT_<number>* prefix. The *<number>* depends on the number of URLs listed in Administer File Attachments page.

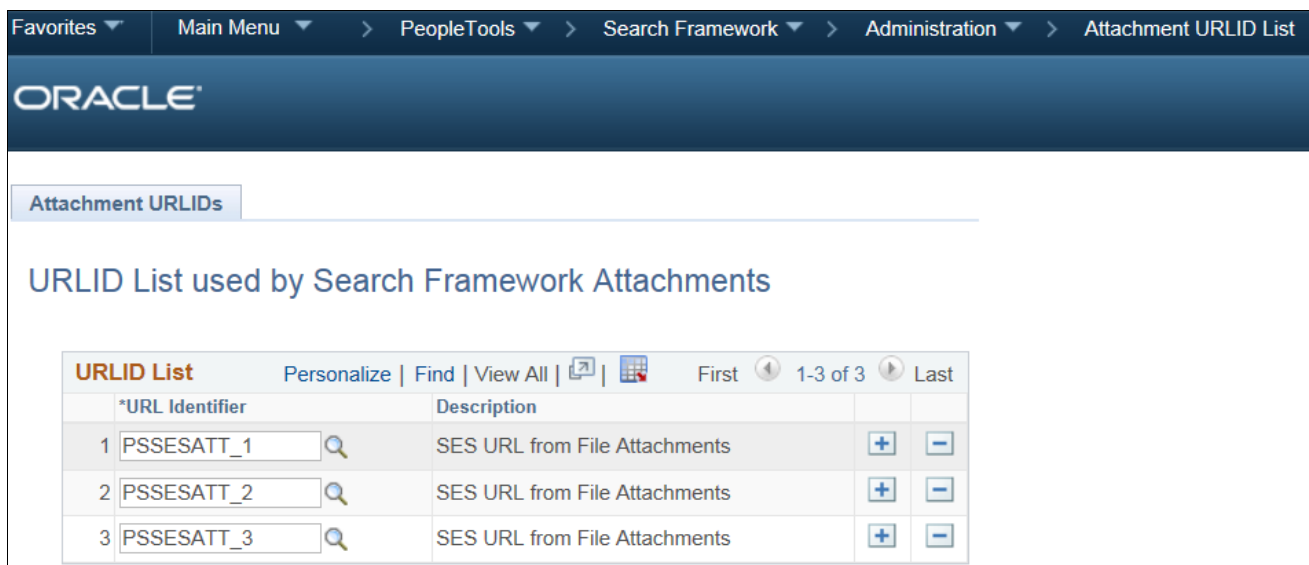
Verify the username and password are created under the URL Properties hyperlink and the URL path is correct. The following example shows URL Properties window:



URL Properties window

3. Select PeopleTools, Search Framework, Administration, Attachment URLID List.

The Attachments URLIDs List page appears as shown in the following example:



URLID List Used by Search Framework Attachments page

Add the URLs created in step 2 to this list.

4. Click Save.

Note. You cannot delete a server after you save the row and quit the component. After you quit, the system assumes that attachments are stored on this server location.

See the product documentation for PeopleTools: Search Technology for more information about the Attachment URL ID list

Note. URLs for SES are only created for servers that are *not* already defined as a URL type.

Chapter 6

Installing PeopleSoft 9.2 General Ledger

This chapter discusses:

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

Prerequisites

This section describes the steps necessary to establish the file attachment storage location for documents that you import to PeopleSoft General Ledger and the database specifics for various file import processes.

The following table lists the setup dependencies for the file import processes in this chapter:

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

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

The URL definition `GL_FILE_IMPORT` defines the storage location of the file attachment. By default, this points to a database record. You may want to change the storage location of the file attachment to another location, such as an FTP server. This is optional.

To change the URL definition:

1. Select PeopleTools, Utilities, Administrations, URLs.
2. Open GL_FILE_IMPORT.
3. Change the URL definition to an FTP server location of your choice.

See Also

PeopleTools: PeopleCode Developer's Guide

Task 6-2: Defining an Environmental Variable on a Process Scheduler Server

The system requires that you define an environmental variable, PS_FILEDIR. This variable defines the temporary flat file location on the process scheduler that runs the file import process.

- If you are using a UNIX or DB2 z/OS process scheduler, edit the psconfig.sh file and specify the flat file location in the environment variable PS_FILEDIR. For example:

```
PS_FILEDIR="/data1";export PS_FILEDIR
```
- If you are using a Microsoft Windows process scheduler, from your Start menu select Programs, Control Panel, System. Select the Advanced Tab and click Environment Variables. Add or modify the system variable PS_FILEDIR and specify its value. For example:

```
C:\TEMP
```

Note. For more technical information on this topic, see the information on `GetFile()` in the *PeopleTools: PeopleCode Language Reference* product documentation, or consult your system administrator.

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

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

For those who are running the following specific import processes:

```
GL_F2_MAF  
GLFACTSI_MAF  
GL_GOALS_IMP
```

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

Chapter 7

Installing and Setting Up Forms Processing for PeopleSoft 9.2 Grants

This chapter discusses:

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

Understanding Forms Processing

The PeopleSoft Enterprise Grants forms printing solution uses file layouts to generate XML. This is accomplished by using existing PeopleSoft PeopleTools functionality. Through the use of XML/XFDF, the PeopleSoft Grants forms solution maps all of the required data elements to the actual sponsor forms. As a result, you can edit and print forms online using Adobe Acrobat Reader 5.0 (or higher). There is no longer a need to engage an additional third party component application for any form printing requirements because the solution uses standard PeopleSoft PeopleTools technology.

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

- Grant Application (PHS 398)
This is the set of proposal application forms that the National Institutes of Health requires for funding requests. This form set is in the process of being superseded by SF-424 R&R submissions through Grants.gov.
- Non-Competing Grant Progress Report (PHS 2590)
This is an interim progress report that the National Institutes of Health requires recipients to submit for funding. You typically submit this form on an annual basis.

Task 7-1: Downloading the Forms from the Sponsor Web Sites

To set up the forms solution for your database, you must download the following PDF files from the sponsor web sites:

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

Inclusion Enrollment Report, Trainee Diversity Report.

- http://grants.nih.gov/grants/funding/phs398/398_forms.pdf
Grant Application.
- <http://grants.nih.gov/grants/funding/phs398/biosketch.pdf>
Biographical Sketch.
- <http://grants.nih.gov/grants/funding/phs398/continuation.pdf>
Continuation Format Page.
- <http://grants.nih.gov/grants/funding/phs398/fp4.pdf>
Detailed Budget for Initial Budget Period Direct Costs Only.
- <http://grants.nih.gov/grants/funding/2590/enrollment.pdf>
Targeted/Planned Enrollment Form.

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

See Setting Up the Forms URL Maintenance Area in PeopleSoft.

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

In this section you will set up the Forms URL Maintenance Area.

To set up the Forms URL Maintenance Area:

1. Select PeopleTools, Utilities, Administration, URLs.

2. On the URL search page, search for and select *GM_FORMS_LOCATION*.

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

The screenshot shows the Oracle URL Maintenance page. The breadcrumb navigation at the top reads: Favorites > Main Menu > PeopleTools > Utilities > Administration > URLs. The page title is "URL Maintenance". The "URL Identifier" is "GM_FORMS_LOCATION". The "*Description" field contains "Grants PDF templates". The "*URLID" field contains "C:\FORMS\". There is a large empty "Comments" text area. At the bottom, there are buttons for "Save", "Return to Search", "Previous in List", "Next in List", "Notify", "Add", and "Update/Display".

URL Maintenance page

3. In the URL field, enter the location where you placed the forms.

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

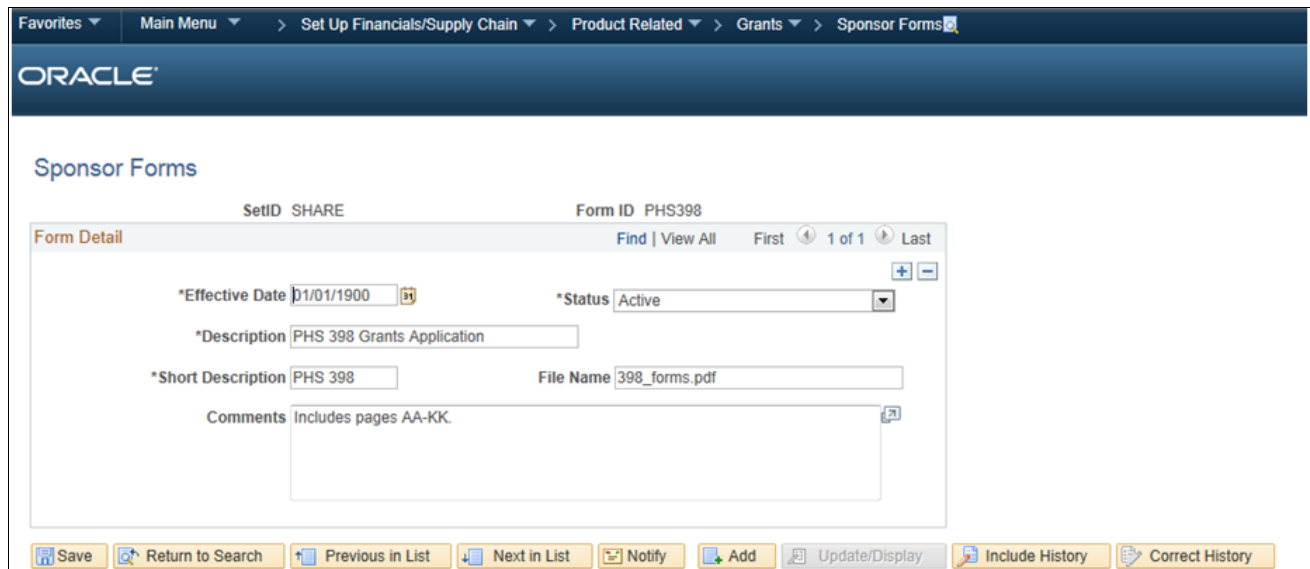
Task 7-3: Entering the Names of the PDF Templates (Optional)

In this step you enter the names of the PDF templates. This step is optional.

To enter the PDF template names:

1. Select Set Up Financials/Supply Chain, Product Related, Grants, Sponsor Forms.

The Sponsor Forms page appears, as shown in the following example:



Sponsor Forms page

2. Search for and access the pages for the forms in the following table using an appropriate SETID value. Then ensure that the file names listed in the following table are reflected in the File Name field.

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

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

Task 7-4: Printing the Forms (Optional)

In this step you print the forms. This step is optional.

To print the forms:

1. Select Grants, Proposal, Print Proposal.

The Print Proposal page appears, as shown in the following example:

Print Proposal page

2. Create your own Run Control ID.
3. Click the look up button (magnifying glass) to select a value for the following fields:
 - Business Unit
 - Proposal ID
 - Version ID
 - Form ID
4. Click the Run button.

The system displays the Process Scheduler Request page.
5. In the Server Name drop-down list box, select the server that you want to use, and then click OK.

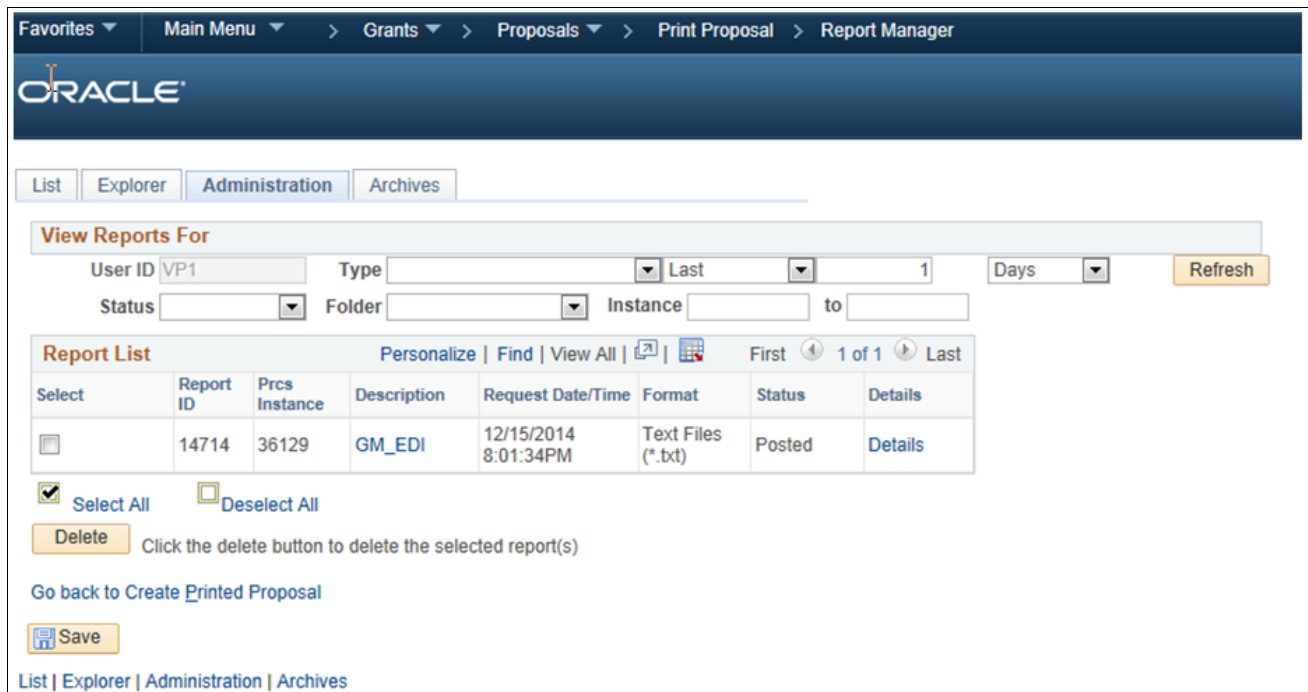
Task 7-5: Viewing Reports

You need Acrobat Reader 5.0 or higher to view reports.

To view reports:

1. Select Reporting Tools, Report Manager, Administration.

The Report Manager page-Administration tab appears as shown in the following example:



Report Manager page- Administration tab

2. On the Report Manager page- Administration tab, locate your process instance (the report description is GM_EDI).

- Click the Details link in the GM_EDI row to view a list of the files that relate to the proposal. The Report Detail page appears, as shown in the following example:

Report Detail ✕

Report

Report ID	14714	Process Instance	36129	Message Log
Name	GM_EDI	Process Type	Application Engine	
Run Status	Success			

GM_EDI

Distribution Details

Distribution Node	HTTP	Expiration Date	12/22/2014
-------------------	------	-----------------	------------

File List

Name	File Size (bytes)	Datetime Created
AE_GM_EDI_36129.stdout	30,268	12/15/2014 8:02:09.015751PM PST
AE_GM_EDI_36129.trc	188	12/15/2014 8:02:09.015751PM PST
AE_GM_EDI_36129_1215200153.AET	60,664	12/15/2014 8:02:09.015751PM PST
PI-PRP001_V101_BioSketch_Schumacher_Kenneth_1.XML	431	12/15/2014 8:02:09.015751PM PST
PI-PRP001_V101_BioSketch_Schumacher_Kenneth_1.xfdf	660	12/15/2014 8:02:09.015751PM PST
PI-PRP001_V101_MAIN.XML	7,357	12/15/2014 8:02:09.015751PM PST
PI-PRP001_V101_MAIN.xfdf	10,614	12/15/2014 8:02:09.015751PM PST

Distribute To

Distribution ID Type	*Distribution ID		
User ▼	VP1	+	-

Report Detail page

- On the Report Detail page, view or print a file by clicking the file link and downloading the file to a local location.
- After you download the file, double-click the local file to open and print.

Chapter 8

Installing PeopleSoft 9.2 Expenses

This chapter discusses:

- Configuring PeopleSoft Integration Broker
- Configuring the Employee Portal Servlet URL

Task 8-1: Configuring PeopleSoft Integration Broker

This section discusses:

- Understanding the PeopleSoft Integration Broker Configuration
- Setting Up Gateways
- Activating the Local Domain
- Activating Queue Definitions
- Setting up Service and Handlers
- Verifying the Message Channel Status

Understanding the PeopleSoft Integration Broker Configuration

This task details the configuration of the PeopleSoft Integration Broker for Approvals.

Task 8-1-1: Setting Up Gateways

To set up the local gateway and load balancer:

1. Navigate to PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and examine the Nodes name
3. Look at the Default Local Node column and search for the "Y" listed row.

Important! Be sure to make note of your Node name. This information is required while configuring the Gateway Properties.

4. Set up a Gateway to begin configuring PeopleSoft Integration Broker.

To set up the local gateway and load balancer:

Select PeopleTools, Integration Broker, Configuration, Gateways.

5. Click Search.

The Gateways page for the local gateway automatically appears by default, as shown in the following example:

Gateways

Gateway ID LOCAL

Local Gateway Load Balancer

URL

Gateway Setup Properties

*Connector ID	Description	*Connector Class Name	Properties	
1 AS2TARGET		AS2TargetConnector	Properties	+ -
2 EXAMPLETARGETCONN		ExampleTargetConnector	Properties	+ -
3 FILEOUTPUT		SimpleFileTargetConnector	Properties	+ -
4 FTPTARGET		FTPTargetConnector	Properties	+ -
5 GETMAILTARGET		GetMailTargetConnector	Properties	+ -
6 HTTPTARGET		HttpTargetConnector	Properties	+ -
7 JMSTARGET		JMSTargetConnector	Properties	+ -
8 PSFT81TARGET		ApplicationMessagingTargetConnector	Properties	+ -
9 PSFTTARGET		PeopleSoftTargetConnector	Properties	+ -
10 RIDCTARGET		RIDCTargetConnector	Properties	+ -
11 SFTPTARGET		SFTPTargetConnector	Properties	+ -
12 SMTPTARGET		SMTPTargetConnector	Properties	+ -

Gateways page

6. On the Gateways page, select the Local Gateway check box.
7. In the URL field, enter the URL for the Local Gateway and the Physical Gateway as follows:
http://<IB Hostname>:<port>/PSIGW/PeopleSoftListeningConnector
8. Click the Load Gateway Connectors button.
9. Click Save.
10. Click the Ping Gateway button to ensure connectivity and proper configuration.

11. Click the Gateway Setup Properties link.

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

Gateway Properties

Sign on to access integrationGateway.properties file.

The default user ID is 'administrator'.

User ID

Password

Change Password

Gateway Properties Sign on page

12. On the Gateway Properties sign on page, enter the following information and then click OK.

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

13. On the Gateway Properties page, in the Gateway Default App. Server group box, enter values for the following fields:

- App server URL
- User ID
- Password
- Tools release (PeopleTools)

14. Add the node name which was noted in step 3.

Use the PeopleSoft PeopleTools release number that you obtained when you pinged the gateway as it must match exactly.

15. Click Save.

16. Ping the node to verify that it is responding.

If a ping is successful, the Ping Node Results page shows a value of Success in the Message Text column.

Task 8-1-2: Activating the Local Domain

Activate the local domain.

Note. Verify that the PUB server is up and running before you perform the following procedure.

To activate the local domain:

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

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

Domain Status page

2. On the Domain Status page, click the Purge Domain Status button.
3. In the Domains group box, in the Domain Status field, select Active from the drop-down list box.
4. Click the Update button.

Note. After you click Update, if your machine name does not appear in the Dispatcher Status list, click the Purge Domain Status button and then click the Refresh button.

Task 8-1-3: Activating Queue Definitions

You activate the queue definitions.

To activate:

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

- On the Queue search page, search for and select the queue name *EXPENSES*.

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

The screenshot shows the Oracle Queue Definitions page for the queue named *EXPENSES*. The page includes the following elements:

- Queue Name:** EXPENSES
- Description:** Expenses Message Channel
- Comments:** This message is used for Approval and Workflow processes to submit and approve transactions.
- Archive:**
- Unordered:**
- Queue Status:** Run
- Owner ID:** Expenses
- Operations Assigned to Queue:**

Service	Version
EX_APPROVAL	VERSION_1
INITIATE	V1
- Define Partitioning Fields:**

Include	Field	Alias Name
<input type="checkbox"/>	OPERATIONNAME	
<input type="checkbox"/>	PUBLISHER	
<input type="checkbox"/>	PUBPROC	

Queue Definitions page

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

Task 8-1-4: Setting up Service and Handlers

You set up the service and handlers.

To set up service and handler:

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

- On the Service Operations search page, search for and select the service operation *EX_APPROVAL*. The Service Operations - General page appears, as shown in the following example:

The screenshot displays the Oracle Service Operations - General page for the service operation *EX_APPROVAL*. The page is organized into several sections:

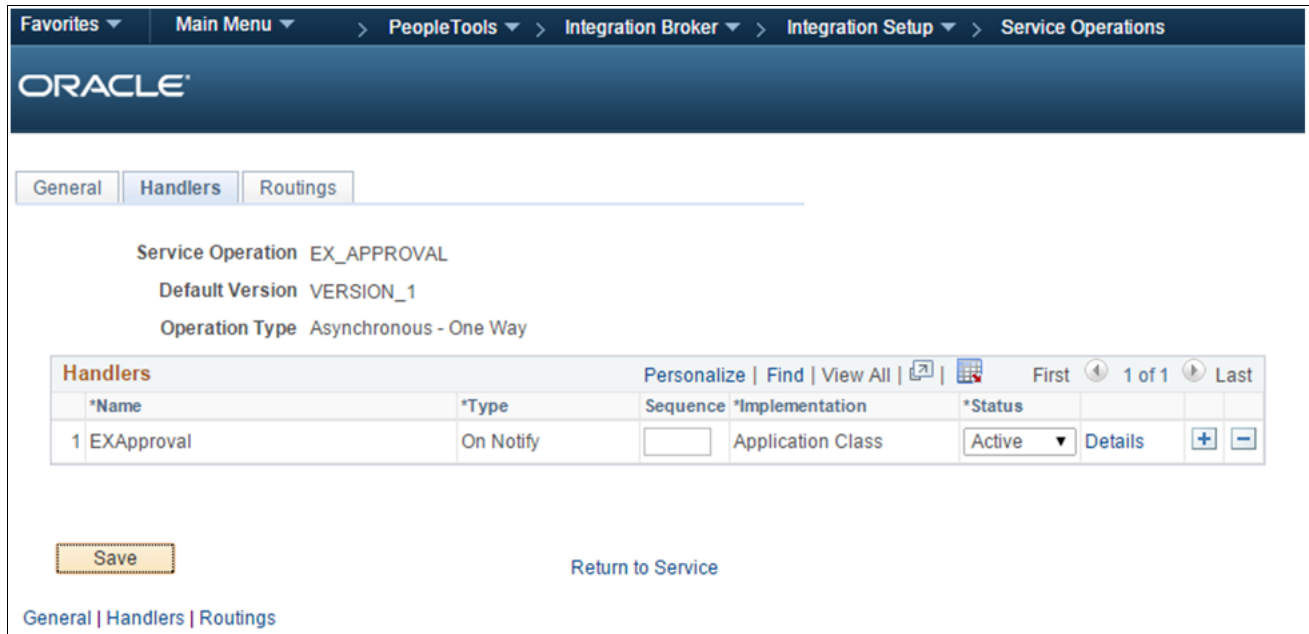
- Service Operation Details:**
 - Service Operation: EX_APPROVAL
 - Operation Type: Asynchronous - One Way
 - *Operation Description: Approval Process
 - Operation Comments: (Empty text area)
 - Owner ID: Expenses
 - Operation Alias: (Empty text field)
- Security and Verification:**
 - User/Password Required
 - *Req Verification: None
- Default Service Operation Version:**
 - *Version: VERSION_1
 - Version Description: Approval Process
 - Version Comments: (Empty text area)
 - Default
 - Active
- Runtime Schema Validation:**
 - Request Message
 - Non-Repudiation
- Routing Status:**

Any-to-Local	Exists
Local-to-Local	Exists
Local-to-Atom	Does not exist
- Routing Actions Upon Save:**
 - Regenerate Any-to-Local
 - Regenerate Local-to-Local
 - Warning: Regenerating sets all routing field values to their initial state.

Service Operations-General page

- On the General page, in the Default Service Operation Version group box, select the Active check box.
- Click Save.

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



Service Operations - Handlers page

- 6. On the Handlers page, in the Status field, select *Active* from the drop-down list box.
- 7. Click Save.

8. Select the Routings tab to access the Routings page, as shown in the following example:

Service Operation EX_APPROVAL
 Default Version VERSION_1
 Routing Name

Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results
<input checked="" type="checkbox"/>	EX_APPROVAL	VERSION_1	Asynch	~~ANY~~	CA920DVL	Inbound	Active	
<input type="checkbox"/>	EX_APPROVAL_LCL	VERSION_1	Asynch	CA920DVL	CA920DVL	Local	Active	

[Return to Service](#)

General | Handlers | Routings

Service Operation-Routings page

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

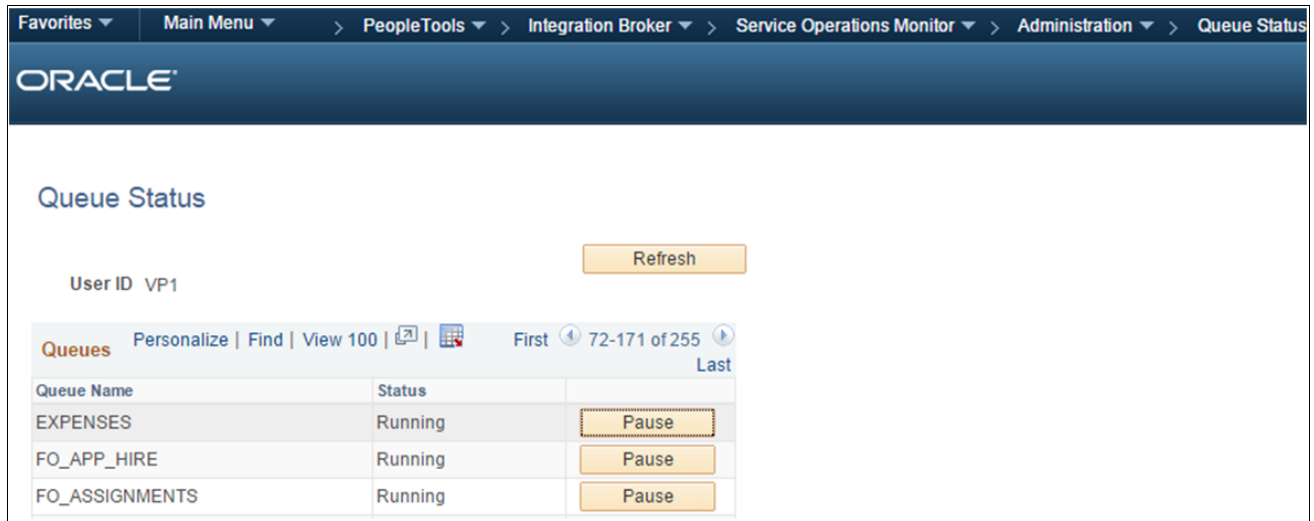
Task 8-1-5: Verifying the Message Channel Status

Then, verify the message channel status.

To run the message channel:

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

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



Queue Status page

2. On the Queue Status page, in the Status column, verify that the status for queue name EXPENSES is *Running*. If the status is *Paused*, click the Run button next Status column in the EXPENSES row.

Task 8-2: Configuring the Employee Portal Servlet URL

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

1. Select PeopleTools, Utilities, Administration, URLs.

2. On the URL search page, search for and select the URL identifier EMP_SERVLET.

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

The screenshot shows the Oracle URL Maintenance page. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'PeopleTools', 'Utilities', 'Administration', and 'URLs'. Below this is the Oracle logo and the page title 'URL Maintenance'. The main content area contains the following fields:

- URL Identifier:** EMP_SERVLET
- *Description:** Employee portal servlet
- *URLID:** http://
- Comments:** Example: http://servername/psp/employeeportaldomain/

Below the form is a section titled 'URL Properties' with the following buttons:

- Save
- Return to Search
- Previous in List
- Next in List
- Notify
- Add
- Update/Display

URL Maintenance page

3. On the URL Maintenance page, in the URLID field, enter the URL to your machine's server name and append */psp/<employeeportaldomain>/*

For *<employeeportaldomain>* use the site name of your employee portal domain. For example, if the web server machine name is serverx, and the employee portal domain is empdb910, the URLID is *http://serverx/psp/empdb910*.

4. Click Save.

Chapter 9

Installing PeopleSoft 9.2 Pay/Bill Management

This chapter discusses:

- Understanding PeopleSoft 9.2 Pay/Bill Management
- Prerequisites
- Verifying Integration Points
- Verifying the Installation Tables for PeopleSoft HCM and PeopleSoft FSCM

Understanding PeopleSoft 9.2 Pay/Bill Management

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

See *PeopleSoft FSCM: Pay/Bill Management*

See *PeopleTools: Integration Broker Administration*, for your release.

Prerequisites

You must install PeopleSoft Pay/Bill Management 9.2 for PeopleSoft HRMS before you can fully utilize the PeopleSoft Pay/Bill Management application. The complete installation instructions for PeopleSoft Pay/Bill Management for PeopleSoft HRMS are available on My Oracle Support.

See *PeopleSoft Human Capital Management Installation*

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

Task 9-1: Verifying Integration Points

This section discusses:

- Understanding Integration Points Verification
- Setting Up Node Definitions for Single Signon
- Setting Up Portal Nodes

- Setting Up Single Signon
- Setting Up Integration Gateways
- Activating Local Domains
- Activating Queue Definitions
- Setting Up the PeopleSoft System-Delivered Service Operations

Understanding Integration Points Verification

In this task, you verify integration points for the PeopleSoft Financials/Supply Chain Management (FSCM) 9.2 and PeopleSoft Human Capital Management (HCM) 9.2 environments. Each environment contains both PSFT_EP and PSFT_HR message nodes. You must set both message nodes in both the PeopleSoft FSCM 9.2 and PeopleSoft HCM 9.2 environments.

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

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

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

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

Understanding Node Definition Set Up for Single Signon

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

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

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

Setting Up Message Node Definitions in PeopleSoft FSCM

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

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Nodes.

- On the Nodes search page, search for and select the node name *PSFT_EP*.

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

The screenshot displays the Oracle Node Definitions page for the *PSFT_EP* node. The page includes the following fields and options:

- Node Name:** PSFT_EP
- *Description:** PSFT_EP
- *Node Type:** PIA
- *Authentication Option:** Password
- Node Password:** [Masked]
- Confirm Password:** [Masked]
- *Default User ID:** PS
- Hub Node:** [Empty]
- Master Node:** [Empty]
- Company ID:** [Empty]
- IB Throttle Threshold:** [Empty]
- Image Name:** [Empty]
- Codeset Group Name:** [Empty]

Checkboxes on the right side of the page:

- Default Local Node
- Local Node
- Active Node
- Non-Repudiation
- Segment Aware

Action buttons on the right side:

- Copy Node
- Rename Node
- Delete Node

Buttons at the bottom:

- Save
- Return to Search

Navigation links at the bottom:

- Node Definitions | Connectors | Portal | WS Security | Routings

Node Definitions page for FSCM - PSFT_ EP Node

- On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
- In the Node Password field, enter a password.
- In the Confirm Password field, re-enter the password.
- Click Save, and then click the Return to Search button.

7. On the Nodes search page, search for and select the node name *PSFT_HR*.

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

The screenshot displays the Oracle Node Definitions page for the node *PSFT_HR*. The page includes a navigation breadcrumb: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Nodes. The Oracle logo is visible in the top left. A search bar contains 'All' and 'Search', with an 'Advanced Search' link. Below the navigation, there are tabs for Node Definitions, Connectors, Portal, WS Security, and Routings. The main form contains the following fields and options:

- Node Name:** PSFT_HR
- *Description:** PS HCM - Human Capital Mgt
- *Node Type:** PIA (dropdown)
- *Authentication Option:** Password (dropdown)
- Node Password:** [Masked]
- Confirm Password:** [Masked]
- *Default User ID:** VP1
- Hub Node:** [Searchable]
- Master Node:** [Searchable]
- Company ID:** [Text]
- IB Throttle Threshold:** [Text]
- Image Name:** [Searchable]
- Codeset Group Name:** [Searchable]

On the right side, there are three buttons: Copy Node, Rename Node, and Delete Node. Below the main form, there are links for Contact/Notes and Properties, and a Save button at the bottom left.

Node Definitions page for FSCM - PSFT_HR node

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

Setting Up Message Node Definitions in PeopleSoft HCM

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

1. In your PeopleSoft HCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Nodes.

- On the Nodes search page, search for and select the node name *PSFT_HR*.

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

The screenshot shows the Oracle Node Definitions page for the *PSFT_HR* node. The page is titled "ORACLE" and has a search bar at the top right. The breadcrumb navigation is: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Nodes. The main content area contains the following fields and options:

- Node Name:** PSFT_HR
- *Description:** PS HCM - Human Capital Mgt
- *Node Type:** PIA (dropdown menu)
- *Authentication Option:** Password (dropdown menu)
- Node Password:** [Masked with 7 dots]
- Confirm Password:** [Masked with 6 dots]
- *Default User ID:** PS (with search icon)
- Hub Node:** [Empty field with search icon]
- Master Node:** [Empty field with search icon]
- Company ID:** [Empty field]
- IB Throttle Threshold:** [Empty field]
- Image Name:** [Empty field with search icon]
- Codeset Group Name:** [Empty field with search icon]

On the right side, there are three action buttons: Copy Node, Rename Node, and Delete Node. Below the fields, there are two tabs: Contact/Notes and Properties. At the bottom left, there is a Save button and a Return to Search button. At the bottom of the page, there are links: Node Definitions | Connectors | Portal | WS Security | Routings.

Node Definitions for HCM - PSFT_HR node

- On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
- In the Node Password field, enter a password.
- In the Confirm Password field, re-enter your password.
- Click Save, and then click the Return to Search button.

7. On the Nodes search page, search for and select the node name PSFT_EP.

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

The screenshot shows the Oracle Node Definitions page for the PSFT_EP node. The page is titled "ORACLE" and has a navigation bar with "Favorites", "Main Menu", "PeopleTools", "Integration Broker", "Integration Setup", and "Nodes". The main content area contains the following fields and options:

- Node Name:** PSFT_EP
- *Description:** PS FDM - Local Node
- *Node Type:** PIA (dropdown menu)
- *Authentication Option:** Password (dropdown menu)
- Node Password:** [Redacted]
- Confirm Password:** [Redacted]
- *Default User ID:** PS
- Hub Node:** [Redacted]
- Master Node:** [Redacted]
- Company ID:** [Redacted]
- IB Throttle Threshold:** [Redacted]
- Image Name:** [Redacted]
- Codeset Group Name:** [Redacted]

On the right side, there are three buttons: "Copy Node", "Rename Node", and "Delete Node". Below the fields, there are two tabs: "Contact/Notes" and "Properties". At the bottom, there is a "Save" button and a "Return to Search" button. The footer of the page contains the text: "Node Definitions | Connectors | Portal | WS Security | Routings".

Node Definitions page for HCM - PSFT_EP node

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

Task 9-1-2: Setting Up Portal Nodes

Understanding Portal Node Set Up

The PeopleSoft FSCM and PeopleSoft HCM environments contain both ERP and HRMS portal nodes. You must set both portal nodes in both environments.

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

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

Setting Up Portal Nodes in PeopleSoft FSCM

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

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *ERP*.

- On the Node Definitions page, select the Portal tab to access the Portal page for the ERP node, as shown in the following example:

The screenshot shows the Oracle PeopleTools interface for configuring a Portal Node. The breadcrumb trail is: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Nodes. The Oracle logo is at the top left. Below the breadcrumb trail, there are tabs for Node Definitions, Connectors, Portal (selected), WS Security, and Routings. The main content area is titled 'Node Name ERP'. Under a 'Details' section, the following fields are visible:

- Description:** Portal Node - ERP. A checkbox for **Local Node** is checked.
- Default Portal:** EMPLOYEE (dropdown menu).
- Tools Release:** 8.54 (text field).
- Application Release:** Financials/SCM 9.20. (text field).
- Content URI Text:** http://localhost/psc/fin (text field). Example: http://someserver/psc/pshome/
- Portal URI Text:** http://localhost/psp/fin (text field). Example: http://someserver/psp/pshome/
- Portal Host Node:** (checkbox, currently unchecked).
- Network Node Name:** (empty text field).

At the bottom left, there is a 'Save' button and a 'Return to Search' button. At the bottom, there is a breadcrumb trail: Node Definitions | Connectors | Portal | WS Security | Routings.

Portal Node page for FSCM - ERP node

- On the Portal page, in the Content URI Text field, enter *http://<server>:<port>/psc/pshome/* to correspond to your PeopleSoft FSCM environment.
- In the Portal URI Text field, enter *http://<server>:<port>/psp/pshome/* to correspond to your PeopleSoft FSCM environment.
- Click Save.
- Click the Return to Search button.
- On the Nodes search page, search for and select the node name *HRMS*.

9. On the Node Definitions page, select the Portal tab to access the Portal page for the HRMS node, as shown in the following example:

The screenshot shows the Oracle PeopleTools interface for configuring a Portal Node. The breadcrumb trail is: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Nodes. The page title is "Node Name HRMS". The "Portal" tab is selected in the navigation bar. The "Details" section shows the following fields and options:

- Description:** Portal Node - HRMS
- Local Node**
- Tools Release:** [Text Input Field]
- Application Release:** [Text Input Field]
- Content URI Text:** [Text Input Field] with example: `http://someserver/psc/pshome/` and current value: `http://localhost/psc/hrms/`
- Portal URI Text:** [Text Input Field] with example: `http://someserver/psp/pshome/` and current value: `http://localhost/psc/hrms/`
- Portal Host Node**
- Network Node Name:** [Text Input Field]

A "Save" button is located at the bottom left of the form.

Portal Node page for FSCM - HRMS node

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

Setting Up Portal Nodes in PeopleSoft HCM

To setup portal node definitions in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *HRMS*.

- On the Node Definitions page, select the Portal tab to access the Portal page for the HRMS node, as shown in the following example:

Node Name HRMS

Details

Description Portal Node - HRMS Local Node

Default Portal EMPLOYEE

Tools Release 8.54

Application Release HRMS 9.20.00.396

Content URI Text Example: <http://someserver/psc/pshome/>
http://localhost/psc/hrms

Portal URI Text Example: <http://someserver/psp/pshome/>
http://localhost/psp/hrms

Portal Host Node

Network Node Name

Save

Return to Search

[Node Definitions](#) | [Connectors](#) | [Portal](#) | [WS Security](#) | [Routings](#)

Portal Nodes page for HCM - HRMS

- On the Portal page, in the Content URI Text field, enter *http://<server>:<port>/psc/pshome/* to correspond to your PeopleSoft HCM environment.
- In the Portal URI Text field, enter *http://<server>:<port>/psp/pshome/* to correspond to your PeopleSoft HCM environment.
- Click the Return to Search button.
- On the Nodes search page, search for and select the node name *ERP*.

8. On the Node Definitions page, select the Portal tab to access the Portal page for the ERP node, as shown in the following example:

The screenshot shows the Oracle PeopleTools interface for configuring a Portal Node. The breadcrumb navigation is: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Nodes. The Oracle logo is in the top left, and a search bar is in the top right. Below the navigation, there are tabs for Node Definitions, Connectors, Portal (selected), WS Security, and Routings. The main content area shows the configuration for a Node named 'ERP'. The 'Details' section includes a 'Description' field with the value 'Portal Node - ERP' and a 'Local Node' checkbox. Below this are input fields for 'Tools Release' and 'Application Release'. The 'Content URI Text' field has an example 'http://someserver/psc/pshome/' and a value 'http://localhost/psc/fin/'. The 'Portal URI Text' field has the same example and value. There is a 'Portal Host Node' checkbox and a 'Network Node Name' input field. A 'Save' button is located at the bottom left of the form.

Portal Nodes page for HCM - ERP node

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

Task 9-1-3: Setting Up Single Signon

Setting Up Single Signon in PeopleSoft FSCM

To verify Single Signon in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Security, Security Objects, Single Signon. The Single Signon page appears, as shown in the following example:

Single Signon page

Single Signon page

2. On the Single Signon page, in the *Trust Authentication Tokens issued by these Nodes* group box, specify the message nodes PSFT_EP and PSFT_HR, as shown in the preceding example.
3. Click Save.

Setting Up Single Signon in PeopleSoft HCM

To verify Single Signon in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.2 environment, select PeopleTools, Security, Security Objects, Single Signon.
2. On the Single Signon page, in the *Trust Authentication Tokens issued by these Nodes* group box, specify the message nodes PSFT_EP and PSFT_HR, as shown in the preceding example.
3. Click Save.

Task 9-1-4: Setting Up Integration Gateways

Setting Up Integration Gateways in PeopleSoft FSCM

To set up Integration Gateways in PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Configuration, Gateways.

2. Click Search.

The Gateways search page for the Local Gateway appears by default, as shown in the following example:

Gateways

Gateway ID LOCAL

Local Gateway Load Balancer

URL

[Inbound Gateways](#)
[JMS Administration](#)

Gateway Setup Properties

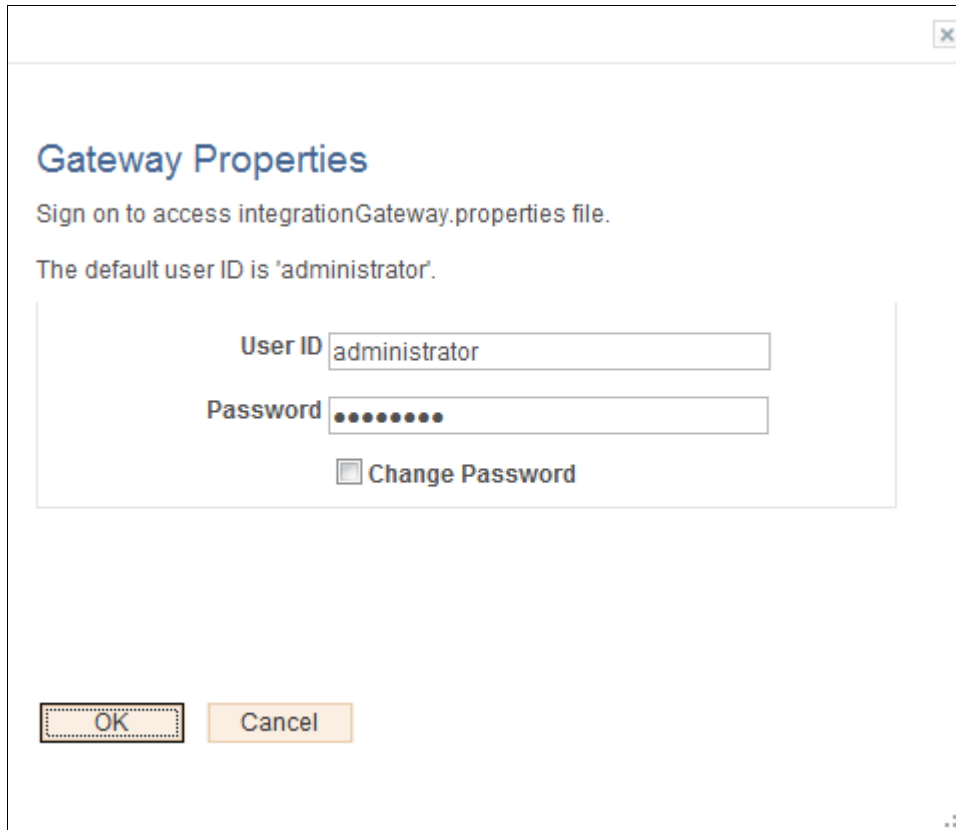
Connectors			Personalize | Find |		First	1-12 of 12	Last
*Connector ID	Description	*Connector Class Name	Properties	+	-		
1	AS2TARGET	AS2TargetConnector	Properties	+	-		
2	EXAMPLETARGETCONN	ExampleTargetConnector	Properties	+	-		
3	FILEOUTPUT	SimpleFileTargetConnector	Properties	+	-		
4	FTPTARGET	FTPTargetConnector	Properties	+	-		
5	GETMAILTARGET	GetMailTargetConnector	Properties	+	-		
6	HTTPTARGET	HttpTargetConnector	Properties	+	-		
7	JMSTARGET	JMSTargetConnector	Properties	+	-		
8	PSFT81TARGET	ApplicationMessagingTargetConnector	Properties	+	-		
9	PSFTTARGET	PeopleSoftTargetConnector	Properties	+	-		
10	RIDCTARGET	RIDCTargetConnector	Properties	+	-		
11	SFTPTARGET	SFTPTargetConnector	Properties	+	-		
12	SMTPTARGET	SMTPTargetConnector	Properties	+	-		

Gateways page for Local Gateway

- On the Gateways page, in the URL field, enter *http://<IBHostname>:<port>/PSIGW/PeopleSoftListeningConnector* for the local gateway URL.
- Click the Load Gateway Connectors button.
- Click Save.
- Click the Ping Gateway button to ensure connectivity and proper configuration.

7. Click the Gateway Setup Properties link.

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



Gateway Properties

Sign on to access integrationGateway.properties file.

The default user ID is 'administrator'.

User ID

Password

Change Password

Gateway Properties sign on page

8. On the Gateway Properties sign on page, enter the User ID and Password for the Integration Gateway.
If you do not know the User ID and Password of the Integration Gateway, contact your system administrator.

9. Click OK.

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

PeopleSoft Node Configuration page

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

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

11. You must add both the PSFT_EP node and PSFT_HR node in the PeopleSoft FSCM application (PSFT_EP with FSCM data and PSFT_HR with HRMS data). Add the required nodes by doing the following:

- a. Click the Add (+) button to add the node *PSFT_EP* (the PeopleSoft FSCM application server node).
- b. Click the Add (+) button to add the node *PSFT_HR* (the PeopleSoft HCM application server node).

12. Enter the PeopleTools release number in the Tools Release field.

Enter the exact release number that you obtained from pinging the gateway.

13. Click Save.

14. Click the Ping Node button to ping the PSFT_EP node and verify that it is responding.

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

Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

Ping Node Results

16. Click Return.

Setting Up Integration Gateways in PeopleSoft HCM

To set up integration gateways in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.2 environment, select PeopleTools, Integration Broker, Configuration, Gateways.

2. Click Search

The Gateways page for the Local Gateway appears by default, as shown in the following example:

Gateways

Gateway ID LOCAL

Local Gateway Load Balancer

URL

Gateway Setup Properties

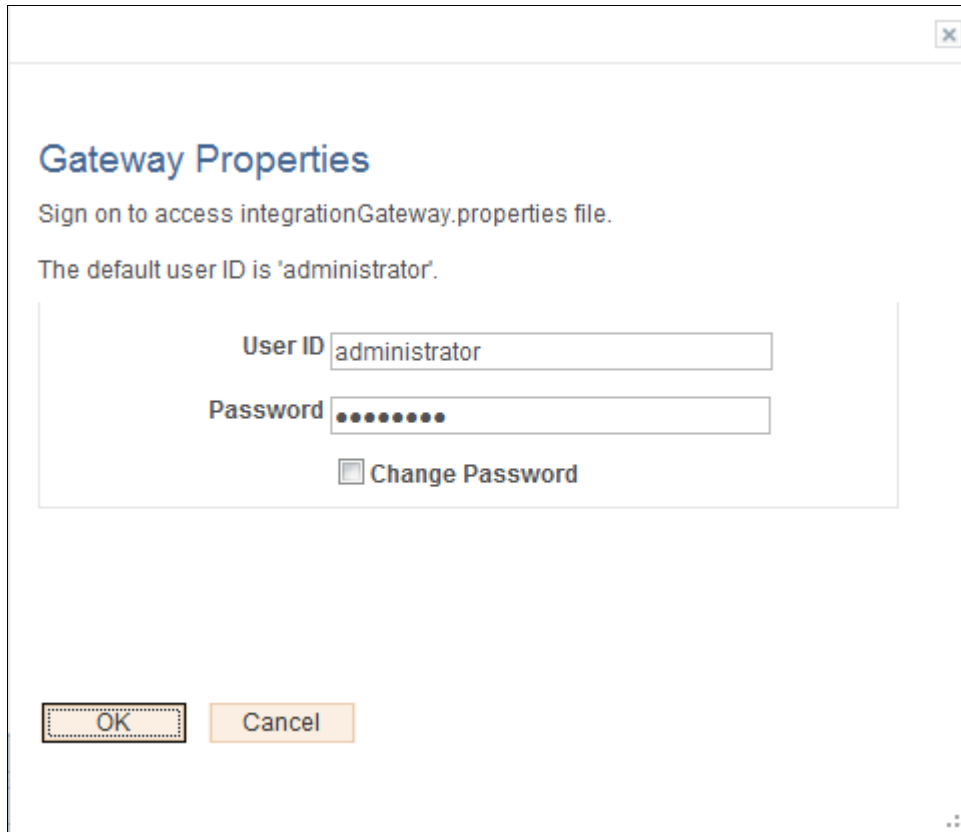
*Connector ID	Description	*Connector Class Name	Properties	
1 AS2TARGET		AS2TargetConnector	Properties	+ -
2 EXAMPLETARGETCONN		ExampleTargetConnector	Properties	+ -
3 FILEOUTPUT		SimpleFileTargetConnector	Properties	+ -
4 FTPTARGET		FTPTargetConnector	Properties	+ -
5 GETMAILTARGET		GetMailTargetConnector	Properties	+ -
6 HTTPTARGET		HttpTargetConnector	Properties	+ -
7 JMSTARGET		JMSTargetConnector	Properties	+ -
8 PSFT81TARGET		ApplicationMessagingTargetConnector	Properties	+ -
9 PSFTTARGET		PeopleSoftTargetConnector	Properties	+ -
10 RIDCTARGET		RIDCTargetConnector	Properties	+ -
11 SFTPTARGET		SFTPTargetConnector	Properties	+ -
12 SMTPTARGET		SMTPTargetConnector	Properties	+ -

Gateways page for the Local Gateway

- On the Gateways page, in the URL field, enter *http://<IBHostname>:<port>/PSIGW/PeopleSoftListeningConnector* for the Local Gateway.
- Click the Load Gateway Connectors button.
- Click Save.
- Click the Ping Gateway button to ensure connectivity and proper configuration.

7. Click the Gateway Setup Properties link.

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



Gateway Properties

Sign on to access integrationGateway.properties file.

The default user ID is 'administrator'.

User ID administrator

Password ●●●●●●●●

Change Password

OK Cancel

Gateway Properties sign on page

8. On the Gateway Properties sign on page, enter the User ID and Password for the Integration Gateway.
If you do not know the User ID and Password of the Integration Gateway, contact your system administrator.

9. Click OK.

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

PeopleSoft Node Configuration page

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

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

11. You must add both the PSFT_EP node and PSFT_HR node in the PeopleSoft HRMS application (PSFT_EP with FSCM data and PSFT_HR with HRMS data). Add the required nodes by doing the following:

- a. Click the Add (+) button to add the node *PSFT_EP* (the PeopleSoft FSCM application server node).
- b. Click the Add (+) button to add the node *PSFT_HR* (the PeopleSoft HCM application server node).

12. Enter the PeopleTools release number in the Tools Release field.

Enter the exact release URL number that you obtained from pinging the gateway.

13. Click Save.

14. Click the Ping Node button to ping the PSFT_HR node and verify that it is responding.

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

Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

Ping Node Results page

16. Click Return.

Task 9-1-5: Activating Local Domains

Activating the Local Domain in PeopleSoft FSCM

To activate the local domain in the PeopleSoft FSCM environment:

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

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

The screenshot shows the Oracle PeopleSoft FSCM Domain Status page. The breadcrumb trail is: Favorites > Main Menu > PeopleTools > Integration Broker > Service Operations Monitor > Administration > Domain Status. The page title is 'Domain Status'. Under 'Domain Criteria', there is a 'Grace Period for all Domains (Minutes)' input field, a 'Purge Domain Status' button, and 'Refresh' and 'Update' buttons. There are checkboxes for 'All Domains Active' and 'All Domains Inactive', and a 'Failover Disabled' status. Links for 'Set Up Failover', 'Master/Slave Load Balance', and 'Slave Templates' are present. The 'Domains' table has columns: Failover Group, Failover Priority, Machine Name, Application Server Path, Domain Status (set to 'Active'), Grace Period, and Slave Indicator. The 'Dispatcher Status' table has columns: Machine Name, Dispatcher Name (PSBRKDSP_dflt), Application Server Path, Status String (ACT), and Date/Time Stamp.

Domain Status page

2. On the Domain Status page, in the Domains Status field, select *Active* for the drop-down list box (for the application server).
3. Click Update.

Note. After you click Update, if your machine name does not appear in the Dispatcher Status list, click the Purge Domain Status button, and then click the Refresh button.

Activating the Local Domain in PeopleSoft HCM

To activate the local domain in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.2 environment, select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.
2. On the Domain Status page, in the Domains Status field, select *Active* from the drop-down list box (for the application server).
3. Click Update.

Note. After you click Update, if your machine name does not appear in the Dispatcher Status list, click the Purge Domain Status button, and then click the Refresh button.

Task 9-1-6: Activating Queue Definitions

Understanding Queue Definition Activation

The following queue definitions must be active for PeopleSoft Pay/Bill Management:

ACTION_REASON
ACTUAL_TIME
COMPETENCY
CUSTOMER
ELAPSED_TIME
ENTERPRISE_SETUP
ESTIMATED_TIME
FO_APP_HIRE
FO_ASSIGNMENTS
FO_MASS_CHANGES
FO_SETUP
FO_SYNC
GL_SETUP
HR_SETUP
MARKET_RATES
MARKET_RATE_LOAD
PAYGROUP_SETUP
PERSON_DATA
PERSON_SETUP
PROJECTS_SETUP
RATING_MODEL
TIME_AND_LABOR_SETUP

Activating Queue Definitions in PeopleSoft FSCM

To activate queue definitions in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Queues.

The Queues search page appears, as shown in the following example:

Queues

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

Find an Existing Value Add a New Value

Search Criteria

Search by: Queue Name begins with

Search Advanced Search

Search Results

View All First 1-100 of 255 Last

Queue Name
ACTION_REASON
ACTUAL_TIME
ADVANCED_SHIPPING_NOTICE
AIRLINE_TICKET_LOAD
AM_SETUP

Queue Search Page

- On the Queues search page, search for and select the queue name *ACTION_REASON*.

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

The screenshot shows the Oracle Queue Definitions page for the queue named *ACTION_REASON*. The page includes a navigation breadcrumb: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Queues. The Oracle logo is at the top left. The main heading is "Queue Definitions".

Form fields include:

- Queue Name:** ACTION_REASON
- Description:** Action Reason Setup
- Comments:** Action Reason Setup
- Archive:**
- Unordered:**
- Queue Status:** Run (dropdown)
- Owner ID:** HR Core Objects (dropdown)

There are two tables below the form:

Operations Assigned to Queue:

Service Operation	Version
ACTION_REASON_FULLSYNC	VERSION_1
ACTION_REASON_SYNC	VERSION_1

Define Partitioning Fields:

Include	Field	Alias Name
<input type="checkbox"/>	ACTION	
<input type="checkbox"/>	ACTION_REASON	
<input type="checkbox"/>	EFFDT	
<input type="checkbox"/>	EFF_STATUS	
<input type="checkbox"/>	DESCR	
<input type="checkbox"/>	DESCRSHORT	
<input type="checkbox"/>	BEN_STATUS	
<input type="checkbox"/>	BAS_ACTION	
<input type="checkbox"/>	COBRA_ACTION	
<input type="checkbox"/>	ROE_REASON	

Buttons at the bottom: Save, Add Field.

Queue Definitions page

- On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
- Click Save.
- Repeat the steps above for the remaining Queues listed in the beginning of this task.

Activating Queue Definitions in PeopleSoft HCM

To activate queue definitions in the PeopleSoft HCM environment:

- In your PeopleSoft HCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Queues.
- On the Queues search page, search for and select the queue name *ACTION_REASON*.
- On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
- Click Save.

5. Repeat the steps above for the remaining Queues listed in the beginning of this task.

Task 9-1-7: Setting Up the PeopleSoft System-Delivered Service Operations

The PeopleSoft system-delivered service operations are meant to keep tables in sync between PeopleSoft FSCM 9.2 and PeopleSoft HCM 9.2. You must make decisions about how to implement the integration. These decisions determine your tasks in activating handlers and routings.

See *PeopleSoft FSCM: PeopleSoft Pay/Bill Management*, "Using Enterprise Integration Points."

Task 9-2: Verifying the Installation Tables for PeopleSoft HCM and PeopleSoft FSCM

This section discusses:

- Verifying the Installation Table for PeopleSoft HCM
- Verifying the Installation Table for PeopleSoft FSCM

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

In this step, you verify the selection of the Pay/Bill Management and Project Costing installation options in the Installation table.

1. In PeopleSoft HCM, select Set Up HCM, Install, Installation Table.

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

The screenshot displays the PeopleSoft HCM Installation Table - Products page. The breadcrumb trail is: Favorites > Main Menu > Set Up HCM > Install > Installation Table. The Oracle logo is visible in the top left. A search bar contains 'All' and 'Search'. Below the search bar are tabs for 'Products', 'HCM Options', 'Product Specific', 'Country Specific', 'Last ID Assigned', 'Third Party/System', and 'Alternate Character'. The 'Products' tab is active, showing a list of installed products under the heading 'Installed Products'. The products are organized into three columns. The first column includes: Human Resources, Benefits Administration, Succession Planning, Pension Administration, Stock Administration, Time and Labor, Labor Rules and Monitoring, Absence Management, Payroll for North America, Payroll Interface, and Global Payroll Core. The second column includes: Education and Government, Federal, Military, French Public Sector, German Public Sector, Currency Conversion Utility, Pay/Bill Management, Directory Interface, HRMS Portal Pack, General Ledger, Project Costing, Receivables, and Student Administration. The third column includes: Enterprise Learning Management, Candidate Gateway, Talent Acquisition Management, eBenefits, eDevelopment, eCompensation, eCompensation Manager, ePay, ePerformance, eProfile, and eProfile Manager. The 'Pay/Bill Management' and 'Project Costing' checkboxes are checked. At the bottom, there are 'Save' and 'Notify' buttons, and a breadcrumb for the current page: Products | HCM Options | Product Specific | Country Specific | Last ID Assigned | Third Party/System | Alternate Character.

PeopleSoft HCM Installation Table - Products: Installed Products page

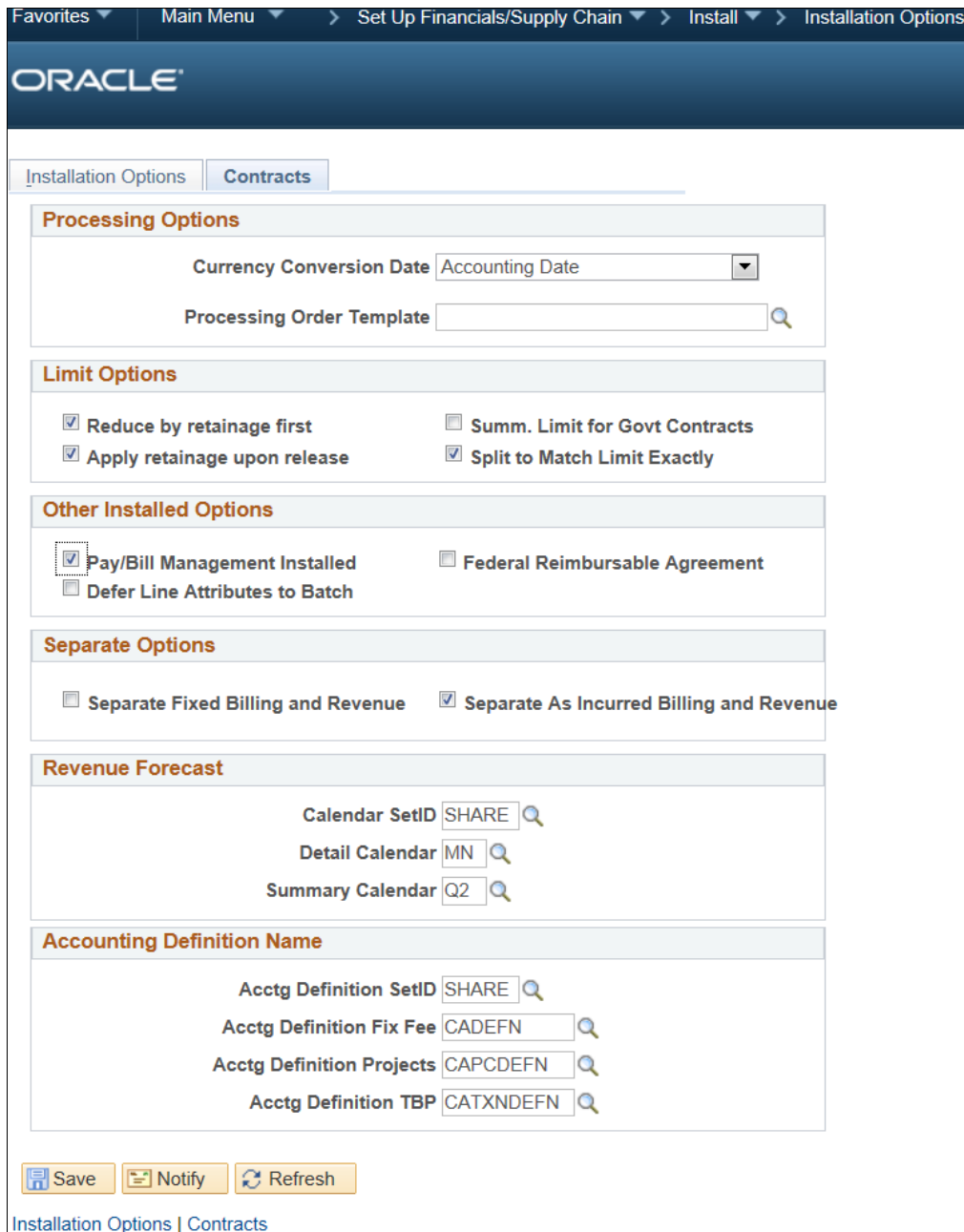
2. On the Products page, in the Installed Products group box, verify that Pay/Bill Management and Project Costing are selected.
If they are not selected then select them.
3. Click Save.

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

In this step, you verify the selection of the Pay/Bill Management for Contracts installation option in the Installation table.

1. In PeopleSoft FSCM, select Set Up Financials/Supply Chain, Install, Installation Options.

2. On the Installation Options page, click the Contracts link to access the Contracts page, as shown in the following example:



PeopleSoft FSCM Installation Options - Contracts page

3. On the Contracts page, verify that Pay/Bill Management Installed is selected. If it is not selected then select it.
4. Click Save.

Chapter 10

Installing Notifications Framework for PeopleSoft 9.2 Purchasing

This chapter discusses:

- Understanding Notifications Framework for PeopleSoft 9.2 Purchasing
- Activating the Local Domain
- Verifying the Message Channel Status
- Configuring the Employee Portal Servlet URL

Understanding Notifications Framework for PeopleSoft 9.2 Purchasing

This chapter details how to set up the Notifications Framework, which is used by PeopleSoft 9.2 Purchasing. You configure the local domain and notification messages in Integration Broker. You also specify the URL for the Employee Portal Servlet.

Task 10-1: Activating the Local Domain

You need to activate the local domain to set up the framework for purchasing notification.

Note. Verify that the PUB server is up and running before you perform the following procedure.

To activate the local domain:

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

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

Domain Status page

2. On the Domain Status page, click the Purge Domain Status button.
3. In the Domains group box, in the Domain Status field, select Active from the drop-down list box.
4. Click the Update button.

Note. After you click Update, if your machine name does not appear in the Dispatcher Status list, click the Purge Domain Status button and then click the Refresh button.

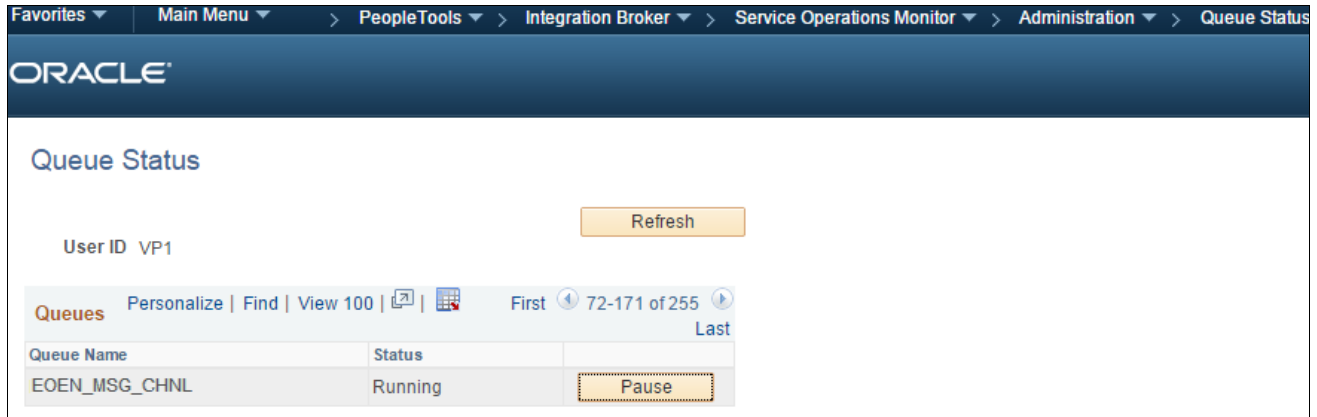
Task 10-2: Verifying the Message Channel Status

The Queue status for Errors and Notifications Message Channel must be set to "Running".

To run the message channel:

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

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



Queue Status page

2. On the Queue Status page, in the Status column, verify that the status for queue name EOEN_MSG_CHNL is Running.

If the status is Paused, click the Run button next to the Status column in the EOEN_MSG_CHNL row.

Task 10-3: Configuring the Employee Portal Servlet URL

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

1. Select PeopleTools, Utilities, Administration, URLs.

- On the URL search page, search for and select the URL identifier *EMP_SERVLET*.

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

URL Maintenance

URL Identifier: EMP_SERVLET

*Description: Employee portal servlet

*URLID: http://webserver/psp/emportal

Comments: Example: http://servername/psp/employeeportaldomain/

URL Properties

Save Return to Search Notify Add Update/Display

URL Maintenance page

- On the URL Maintenance page, in the URLID field, enter the URL to your machine's server name and append */psp/<employeeportaldomain>/*
For *<employeeportaldomain>* use the site name of your employee portal domain. In the preceding example, the machine server name is webserver, the employee portal domain is empdb910, and the URLID is *http://webserver/psp/empdb910*.
- Click Save.

Chapter 11

Installing PeopleSoft 9.2 ESA and FSCM Portal Packs

This chapter discusses:

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

Task 11-1: Granting Access to Navigation Pages

To access the navigation pages, you must grant all users security to the Navigation Page IScripts. Using PeopleSoft Data Mover, run the EOPP_ADD_ROLE.DMS script that is in *PS_APP_HOME*\scripts.

Note. When you create a new user ID, you should add the EOPP_USER role to the new user ID.

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

To add, remove or change the layout of the homepage, you must grant the homepage personalization security access to all non-guest users.

To update the homepage personalization permission list, use PeopleSoft Data Mover to run the PORTAL_HP_PERS.DMS script.

To add the Portal User role to the user IDs, use PeopleSoft Data Mover to run the PORTAL_ADD_ROLE.DMS script. You can find both scripts in <PS_APP_HOME>\scripts.

Note. You should grant the PAPP_USER role to all new user IDs for access to the homepage personalization. After running this script, you should manually remove the role PAPP_USER from any GUEST User ID because the GUEST user should not be personalizing the common homepage.

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

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

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

Chapter 12

Integrating PeopleSoft 9.2 Project Costing and Program Management with Microsoft Project 2007, 2010, or 2013

This chapter discusses:

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

Understanding the PeopleSoft-Microsoft Project Integration

The PeopleSoft-Microsoft Project Integrator is required if you are integrating PeopleSoft Project Costing or PeopleSoft Program Management with Microsoft Project 2007 (Microsoft Windows XP), Microsoft Project 2010, or Microsoft Project 2013. PeopleSoft-Microsoft Project Integrator must be installed and running on each file server that you plan to use as a point of integration.

Note. PeopleSoft-Microsoft Project Integrators must be installed on the machine that is configured with Microsoft Project 2007, Microsoft Project 2010, or Microsoft Project 2013. It is important that this machine is not used for any other purpose. The Integrator supports Windows Terminal Server which means that one machine can be used to run multiple Integrators.

Note. The supported browser for integrating PeopleSoft Project Costing with Microsoft Project is Internet Explorer (IE).

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

To install the project integrator:

1. Create a directory, referred to here as *<MSP_HOME>*, for the PeopleSoft-Microsoft Project Integrator on the Microsoft Windows machine that you dedicate as the Microsoft Project Integrator.
For example: C:\MSP\.
2. From your file server, copy the files in *<PS_APP_HOME>/src/vb/msp* to the *<MSP_HOME>* directory.
3. To register any missing ActiveX controls in the Microsoft Windows machine that you dedicate as the Microsoft Project Integrator, check the Windows system installation directory (referred to here as *<WINDOWS_INST>*), for example C:\WINNT\SYSTEM32 or C:\WINDOWS\SYSTEM32, for the following OCX files:
 - Richtx32.ocx

- TABCTL32.OCX
 - MSINET.OCX
4. If any of these files are missing, do the following:
- a. Copy the three files from <PS_APP_HOME>/src/vb/msp to <WINDOWS_INST>.
 - b. Copy the file regmsp.bat from <PS_APP_HOME>/src/vb/msp to <WINDOWS_INST>.
 - c. Run <WINDOWS_INST>\regmsp.bat to register the OCXs.

For example:

C:\WINNT\system32\regmsp.bat.

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

After the PeopleSoft-Microsoft Project Integrator begins running, you must configure it for your environment, as follows:

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

PeopleSoft-Microsoft Project Integrator - Configuration tab

3. Enter the following values:
 - In the Web Server Name field, enter the name of your web server.
 - In the HTTP Document Root/App Server field, enter the name of your application server.

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

For example:

http://abc12345.us.oracle.com:4321/psp/e910p21x/?cmd=login

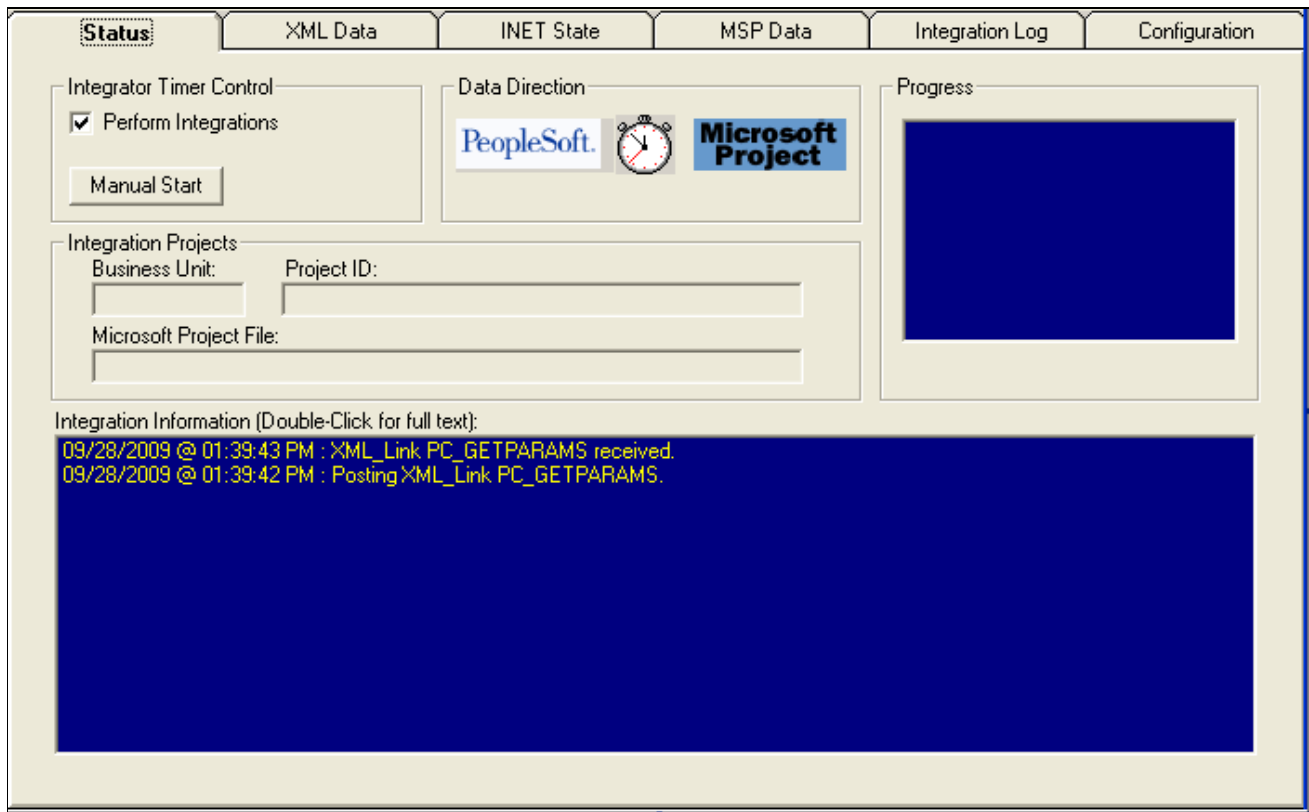
In the preceding example, *abc12345.us.oracle.com:4321* is entered as the Web Server Name and *e910p21x* is entered as the HTTP Document Root/App Server.

- In the FTP Server field, enter the FTP server that this integrator uses to direct the application server to send the .mpp files for integration.
 - In the FTP Root field, enter the Windows file path to the root location of the FTP server. This is the file path that Microsoft Project uses to find the .mpp files to integrate.
4. You can verify that the Microsoft Project Integrator is running successfully when you see a message such as this:

Example of Integration Information message when working properly:

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

This example shows the message in the Integration Information section of the Status page:



Microsoft Project Integrator page: Status tab showing Integration Information message

If you receive the following error in the XML Data tab the first time that you run the integrator: *10.5.1 500 Internal Server Error. The server encountered an unexpected condition which prevented it from fulfilling the request.*

Do the following:

- Open a browser and run the following URL:

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

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

- Then run the integrator again.

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

Chapter 13

Defining an FTP Server for File Attachments in PeopleSoft 9.2 Project Costing

This chapter discusses:

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

Understanding File Attachment Storage

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

Task 13-1: Setting Up File Attachment Storage on the Database

To store file attachments on the database:

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

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

Task 13-2: Setting Up File Attachment Storage on a File Server

To store file attachments on a file server:

1. Verify that your FTP server has adequate disk storage to store the project and activity documents.
2. Select PeopleTools, Utilities, Administration, URLs.
3. On the URLs search page, search for and select the URL `PC_PROJECTS_DOC_ATTACHMENT`.

Note. PeopleSoft Project Costing delivers this URL.

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

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

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

- In the User ID field, enter the user ID of the user account under which all users connect to the FTP server to add, update, view and delete documents.
- In the Password field, enter the password that is associated with the user account under which all users connect to the FTP server.
- In the Machine Name field, enter the machine name by which you physically identify the FTP server on the network.

If you create an optional directory for document storage on the server, include the directory name when you cite the path. You can also store attachments in the root directory of the FTP server.

5. Click Save.
6. On the Installation Options - Project Costing page, in the File Attachment Options section, select the *File Server* option and enter the home directory where you store the attachment files.
7. Click Save.

See the product documentation for PeopleTools: System and Server Administration, "Using PeopleTools Utilities," for more information on the PeopleSoft URL Maintenance page.

See the product documentation for PeopleSoft FSCM: Application Fundamentals, "Setting Installation Options for PeopleSoft Applications," for more information on the PeopleSoft Installation Options - Project Costing page.

Chapter 14

Setting Up PeopleSoft 9.2 Staffing Front Office

This chapter discusses:

- Setting Up Document Attachments
- Setting Up the Secured Enterprise Search Engine
- Integrating Resume Parsing for PeopleSoft Staffing Front Office

Task 14-1: Setting Up Document Attachments

This section discusses:

- Understanding Document Attachments
- Setting Up the File Attachment Server

Understanding Document Attachments

PeopleSoft Staffing Front Office 9.2 uses the standard file attachments functionality. Many PeopleSoft products and components use this functionality.

Note. Oracle supports PeopleSoft Staffing Front Office only on Microsoft SQL Server, Oracle, and DB2 LUW.

If you are planning to use file attachments for Applicants, Employees, Orders, Assignments, Customers, or Contacts, then you need to set up a File Attachments server. PeopleSoft Staffing Front Office supports any of the following file attachment server types:

- FTP (file transfer protocol server)
- DB (database server)
- URL (universal resource locator server)

Task 14-1-1: Setting Up the File Attachment Server

The system stores and retrieves Attachments to PeopleSoft Staffing Front Office Orders and Assignments from the server locations that you define on the Administer File Attachments page. System administrators can configure one or more servers to store attachments, set up new servers, and identify the active server. Administrators can add or modify the FTP root folder for FTP servers. These servers can be FTP, URLs, or Database servers. This section describes how to configure a Database server.

Note. If you want to configure an FTP or URL server, you can find more information for setting up File Attachments in FSCM architecture in *PeopleSoft FSCM: Application Fundamentals*.

To set up a file attachment server for PeopleSoft Staffing Front Office:

1. Select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments.

The Administer File Attachments page appears, as shown in this example:

ID	Type	*Login	*Password	Confirm Password	*Server/Record Name/URL Id	Path	SES URL Equivalent
1	FTP	ftpuser	••••••••	••••••••	10.244.0.253	FSCM91	PSSESATT_1
2	FTP	ftpuser	••••••••	••••••••	pf-sun07	fscm90	PSSESATT_2
3	DB				PV_ATT_DB_SRV		PSSESATT_3
4	URL				COMMON_ATT_S_RI		

Administer File Attachments page

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

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

3. Click the Add Database Server button to insert a new row into the grid to define a new Database server for attachments.

The new row includes the following:

- The ID field displays the ID number that the system assigns for each server on this page.
When an attachment is stored to the server, the server ID is inserted into the attachment record. When you request to download (view) this attachment, the system retrieves the attachment from the original server based on the server ID.
- The Type field identifies the type of server based on whether you click the Add URL Server button, the Add FTP Server button, or the Add Database Server button.

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

4. In the Server/Record Name/URL Id field, accept the default record name, PV_ATT_DB_SRV.
5. Click Save.

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

Note. The Component Subdirectories group box and fields are *not* applicable for PeopleSoft Staffing Front Office attachments.

Task 14-2: Setting Up the Secured Enterprise Search Engine

PeopleSoft Staffing Front Office 9.2 uses the Secured Enterprise Search (SES) engine to address its search needs. The SES engine is a common functionality between PeopleSoft Staffing and Resource Management.

You can deploy the Search Definitions in PeopleTools, Search Framework, Administration, Deploy/Delete Object.

See the product documentation for PeopleTools: PeopleSoft Search Technology, "Understanding PeopleSoft Search Framework," for more information about installing SES.

Task 14-3: Integrating Resume Parsing for PeopleSoft Staffing Front Office

This section discusses:

- Understanding Resume Parsing for PeopleSoft Staffing Front Office
- Setting Up Staffing Installation Options for Resume Parsing
- Configuring the PeopleSoft Integration Broker
- Setting Up Mapping
- Assigning Mapping Setups
- Defining Mapping Values

Understanding Resume Parsing for PeopleSoft Staffing Front Office

Resume parsing strips resumes of their formatting, leaving behind the work history, skill set, education, and other data in a basic and consistent format. You can then load this extracted data into a database and the appropriate fields for searching and processing.

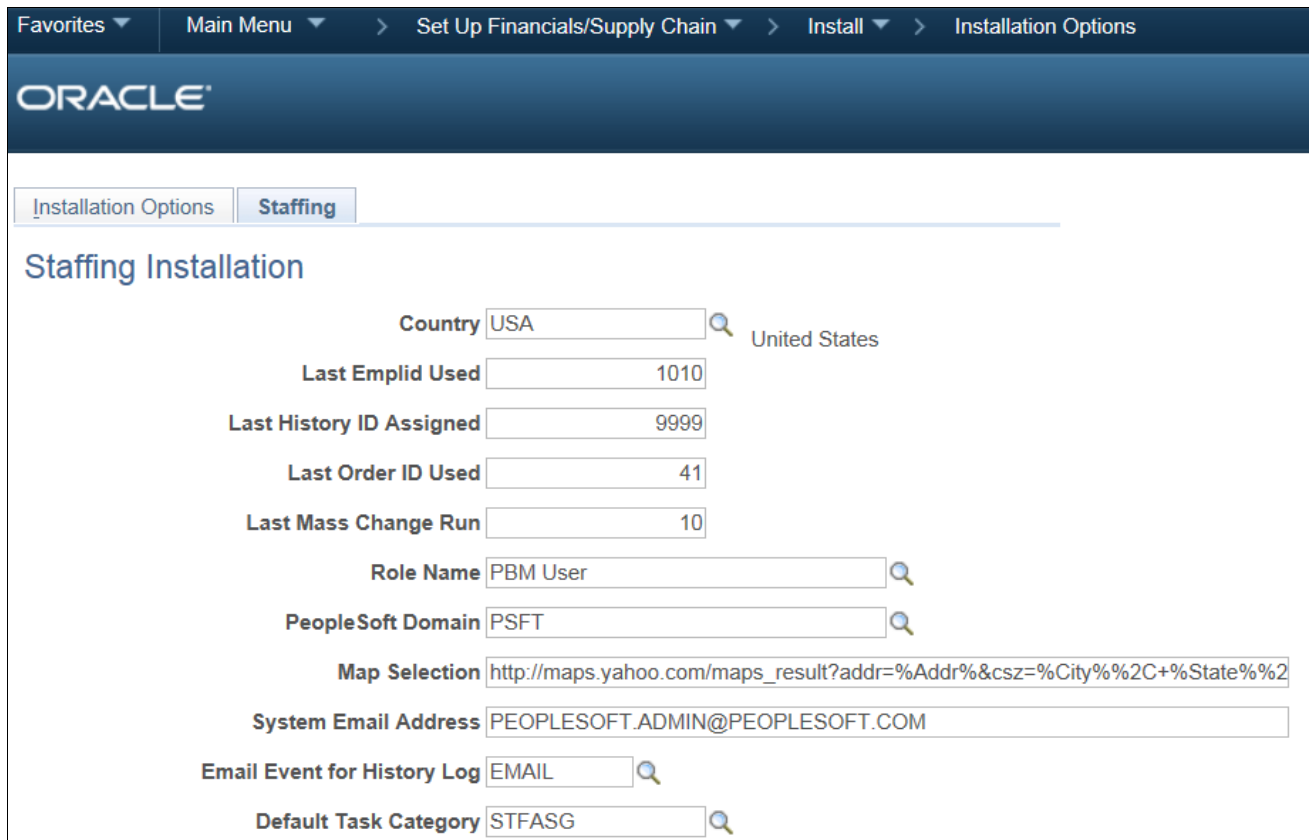
You can use PeopleSoft Staffing Front Office (SFO) to integrate with additional component (third-party) resume parsing software (which must be compliant with HR-XML Candidate standard) to retrieve the extracted data.

Task 14-3-1: Setting Up Staffing Installation Options for Resume Parsing

To set up PeopleSoft SFO installation options to use resume parsing:


1. Select Set Up Financials/Supply Chain, Install, Installation Options.

2. Select the Staffing tab to access the Staffing Installation page, as shown in the following example:



Installation Options > Staffing

Staffing Installation


Country  United States


Last Emplid Used

Last History ID Assigned

Last Order ID Used


Last Mass Change Run


Role Name 

PeopleSoft Domain 

Map Selection

System Email Address

Email Event for History Log 

Default Task Category 

Installation Options - Staffing Installation page showing the PeopleSoft Domain

- On the Staffing Installation page, in the PeopleSoft Domain field, enter or browse to select the PeopleSoft domain.

For example: *PSFT*.

Installation Options - Staffing Installation page showing the Resume Parsing Provider

- In the 3rd Party Integrations group box, select the Resume Parsing Provider check box.

The remaining fields in this section vary, depending on the resume parsing provider that you select.

Note. After you complete your basic PeopleSoft FSCM 9.2 and PeopleSoft SFO installation, you can complete the remaining Staffing Installation options and fields on this page using the implementation instructions in the PeopleSoft 9.2 Staffing Front Office documentation.

Task 14-3-2: Configuring the PeopleSoft Integration Broker

This section discusses:

- Activating the Domain
- Setting Up Integration Gateways
- (Optional) Adding the Proxy Settings
- Encrypting the Password for the secureKeystore

Activating the Domain

To activate the local domain in PeopleSoft FSCM:

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.

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

The screenshot shows the Oracle PeopleSoft Domain Status page. The breadcrumb trail is: Favorites > Main Menu > PeopleTools > Integration Broker > Service Operations Monitor > Administration > Domain Status. The page title is 'Domain Status'. Under 'Domain Criteria', there is a 'Grace Period for all Domains (Minutes)' input field. Below this are buttons for 'Purge Domain Status', 'Refresh', and 'Update'. There are checkboxes for 'All Domains Active' and 'All Domains Inactive', and a 'Failover Disabled' status. Below this are links for 'Set Up Failover', 'Master/Slave Load Balance', and 'Slave Templates'. The 'Domains' table has columns: Failover Group, Failover Priority, Machine Name, Application Server Path, Domain Status, Grace Period, and Slave Indicator. The 'Domain Status' dropdown is set to 'Active'. The 'Dispatcher Status' table has columns: Machine Name, Dispatcher Name, Application Server Path, Status String, and Date/Time Stamp. The 'Status String' is 'ACT'.

Domain Status page

2. On the Domain Status page, in the Domain Status field, select *Active* from the drop-down list box.
3. Click the Update button.

Note. After you click Update, if your machine name does not appear in the list, click the Purge Domain Status button and then click the Refresh button.

Setting Up Integration Gateways

To set up integration gateways in PeopleSoft FSCM:

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Configuration, Gateways and click Search.

The Gateways page for the Local Gateway appears by default, as shown in the following example:

Gateways

Gateway ID LOCAL

Local Gateway Load Balancer

URL

Inbound Gateways
JMS Administration

Gateway Setup Properties

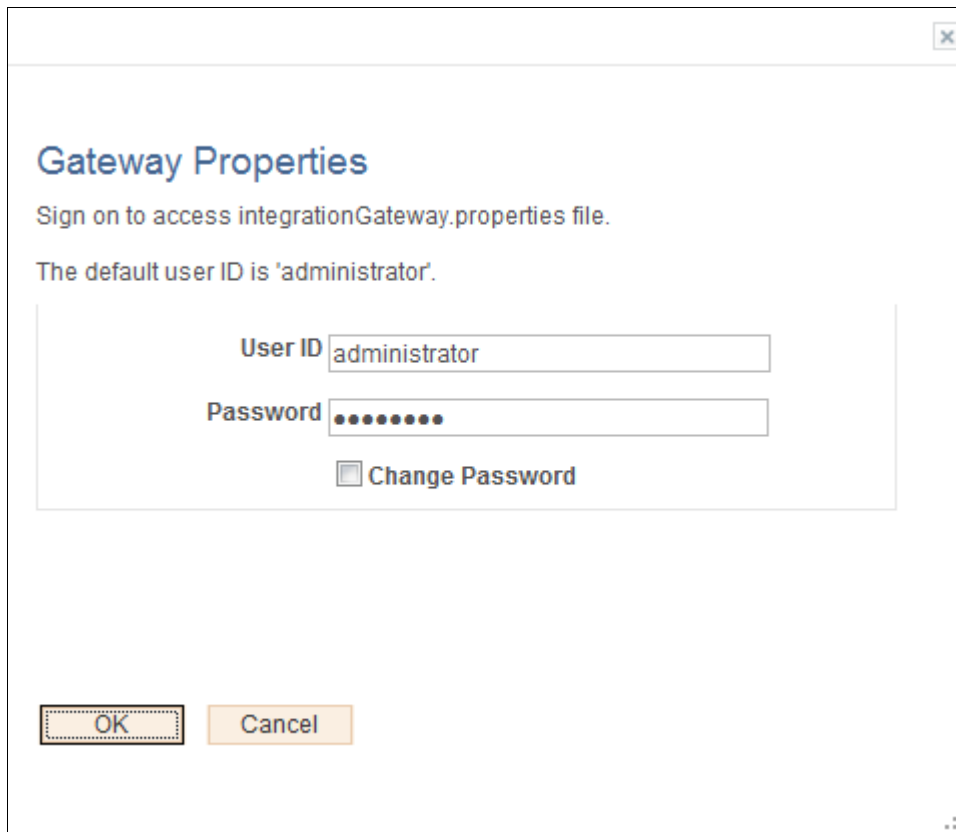
Connectors			Personalize | Find | First 1-12 of 12 Last	
*Connector ID	Description	*Connector Class Name	Properties	+ -
1 AS2TARGET		AS2TargetConnector	Properties	+ -
2 EXAMPLETARGETCONNECTOR		ExampleTargetConnector	Properties	+ -
3 FILEOUTPUT		SimpleFileTargetConnector	Properties	+ -
4 FTPTARGET		FTPTargetConnector	Properties	+ -
5 GETMAILTARGET		GetMailTargetConnector	Properties	+ -
6 HTTPTARGET		HttpTargetConnector	Properties	+ -
7 JMSTARGET		JMSTargetConnector	Properties	+ -
8 PSFT81TARGET		ApplicationMessagingTargetConnector	Properties	+ -
9 PSFTTARGET		PeopleSoftTargetConnector	Properties	+ -
10 RIDCTARGET		RIDCTargetConnector	Properties	+ -
11 SFTPTARGET		SFTPTargetConnector	Properties	+ -
12 SMTPTARGET		SMTPTargetConnector	Properties	+ -

Gateways page for the Local Gateway

2. On the Gateways page for the local gateway, in the URL field, enter *http://<IBHostname>:<port>/PSIGW/PeopleSoftListeningConnector* for the local gateway URL.
3. Click the Load Gateway Connectors button.
4. Click Save.
5. Click the Ping Gateway button to verify connectivity and proper configuration.

6. Click the Gateway Setup Properties link to access the Gateway Properties.

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



Gateway Properties

Sign on to access integrationGateway.properties file.

The default user ID is 'administrator'.

User ID

Password

Change Password

Gateway Properties signon page

7. On the Gateway Properties signon page, enter the User ID, administrator in the preceding example, and Password for the Integration Gateway.
If you do not know the User ID and Password of the Integration Gateway, contact your system administrator.

8. Click OK.

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

PeopleSoft Node Configuration

URL: http://localhost:PSIGW/PeopleSoftListeningConnector

Gateway Default App. Server

App Server URL	User ID	Password	Tools Release	Domain Password	Virtual Server Node
//localhost:9000	VP1	.....	8.54		

PeopleSoft Nodes Personalize | Find | View All | First 1 of 1 Last

Node Name	App Server URL	User ID	Password	Tools Release	Domain Password	
PSFT_EP	//localhost:9000	VP1	.....	8.54		Ping Node + -

Advanced Properties Page

OK Cancel Save

PeopleSoft Node Configuration page

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

- App Server URL, //localhost:9000 in this example
- User ID, VP1 in this example
- Password
- Tools Release (PeopleTools Release), 8.54 in this example

10. In the PeopleSoft Nodes group box, in the Node Name field, enter *PSFT_EP* for the PeopleSoft local node.

As necessary, click the Add (+) button to add the default local node PSFT_EP (Oracle delivers this node as demo data).

11. In the Tools Release field, enter the PeopleSoft PeopleTools release number that you obtained when you pinged the gateway, such as 8.4; it must match exactly.

12. Click Save.

13. Click the Ping Node button to ping the PSFT_EP node (the default local node) and verify that it is responding.

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

Ping Node Results

Node Information

Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

Return

Ping Node Results page

14. Click the Return button to return to the PeopleSoft Node Configuration page.

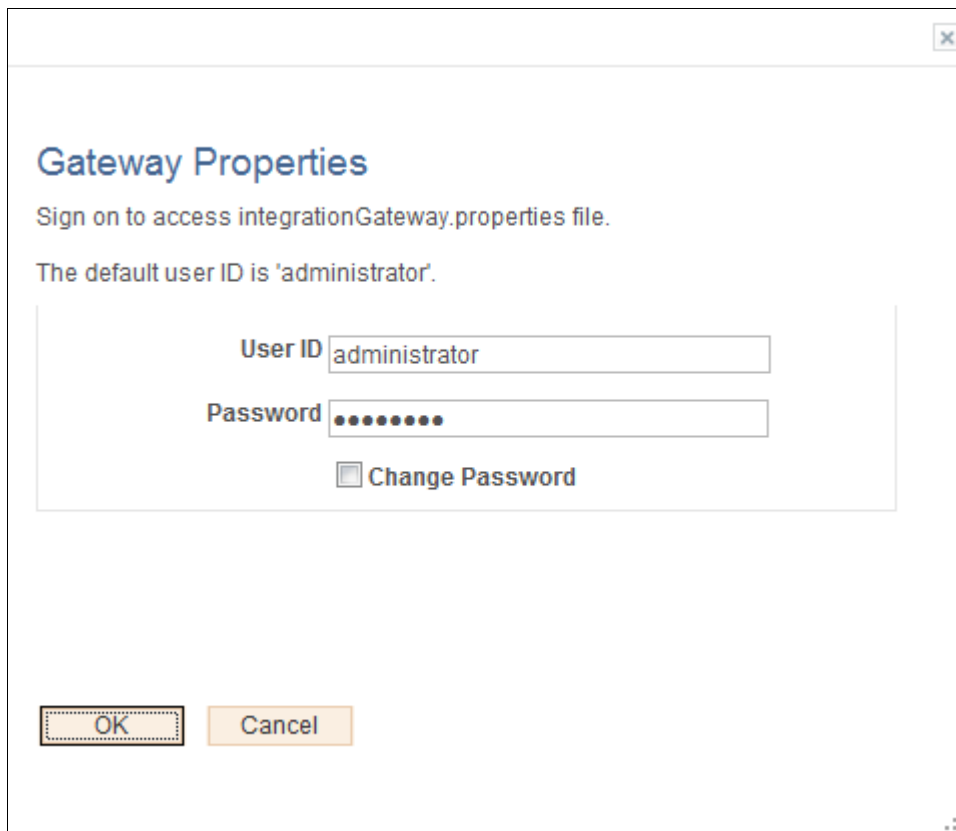
(Optional) Adding the Proxy Settings

If your environment is behind a proxy server, perform these steps to add the proxy settings to the gateway. Adding proxy settings is optional, based on your server configuration. If you have no proxy settings to add, you can skip these steps and proceed to the next task.

To add proxy settings to the gateway:

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click the Gateway Setup Properties link to access the Gateway Properties.

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



The screenshot shows a signon dialog box titled "Gateway Properties". The text inside reads: "Sign on to access integrationGateway.properties file." and "The default user ID is 'administrator'." Below this, there are two input fields: "User ID" containing the text "administrator" and "Password" containing masked characters. A checkbox labeled "Change Password" is located below the password field. At the bottom of the dialog, there are "OK" and "Cancel" buttons.

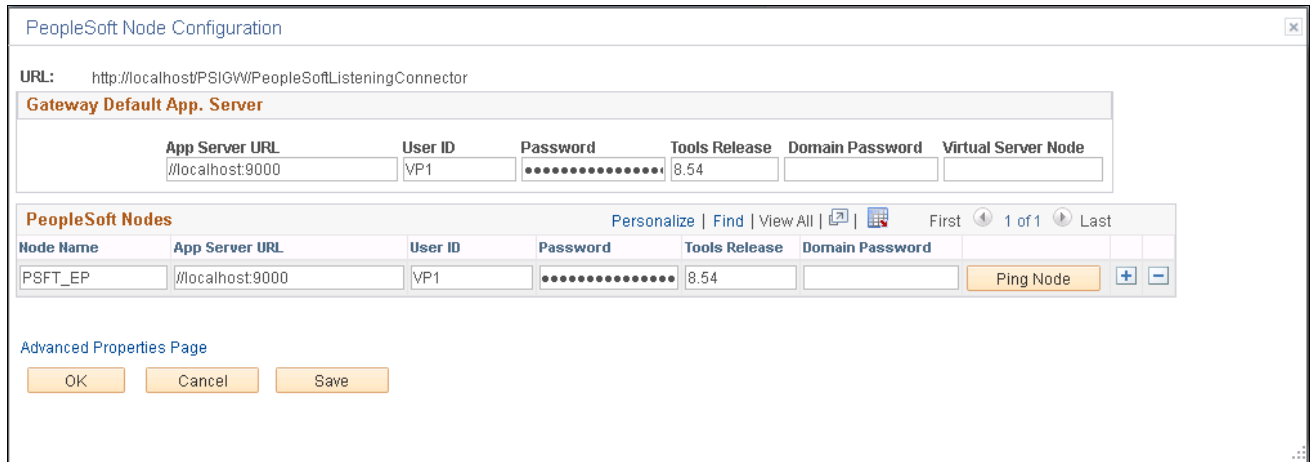
Gateway Properties signon page

3. On the Gateway Properties signon page, enter the User ID, administrator in the preceding example, and Password for the Integration Gateway.

If you do not know the User ID and Password of the Integration Gateway, contact your system administrator.

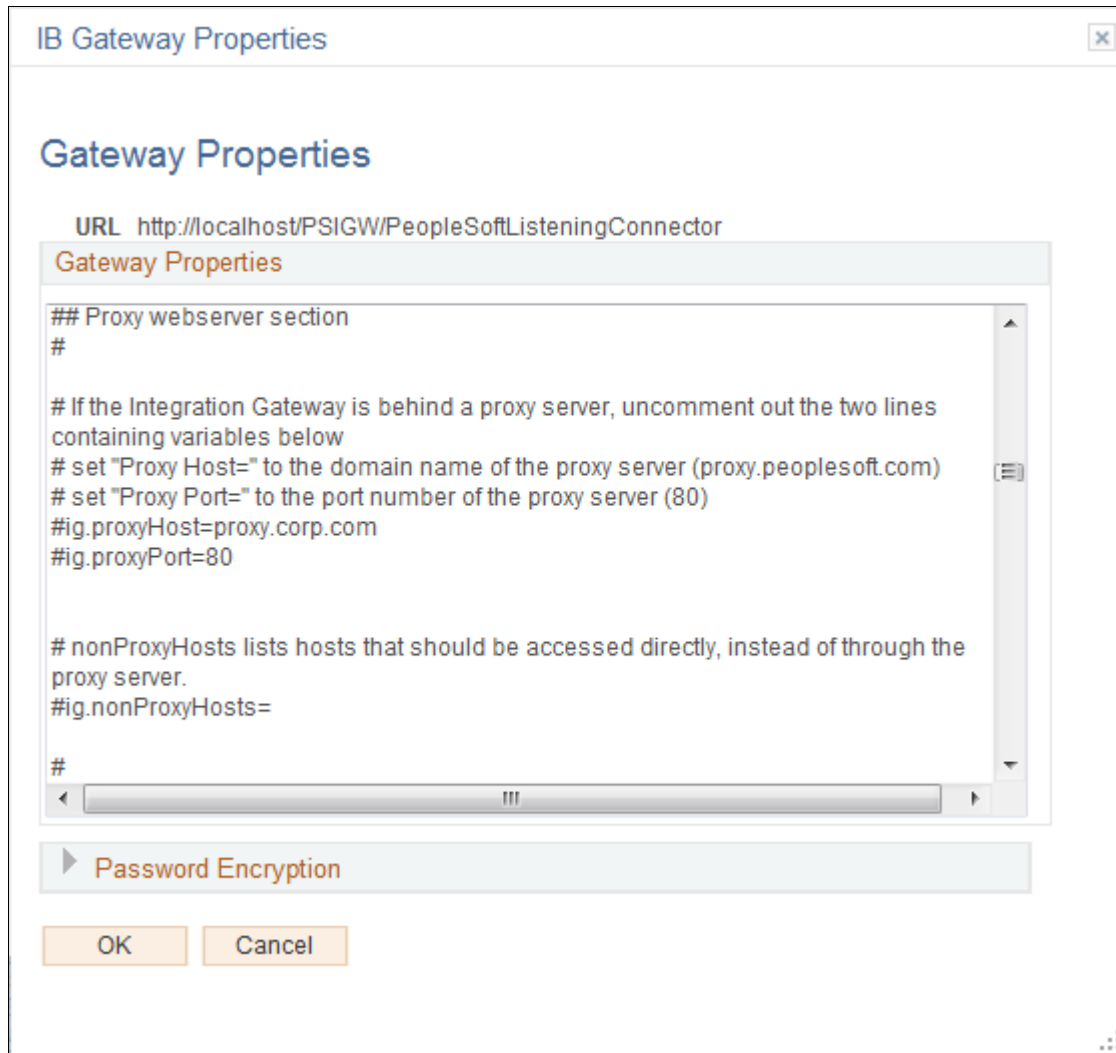
4. Click OK.

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



PeopleSoft Node Configuration page

- On the PeopleSoft Node Configuration page, click the Advanced Properties Page link to access the Gateway Properties page, as shown in the following example:

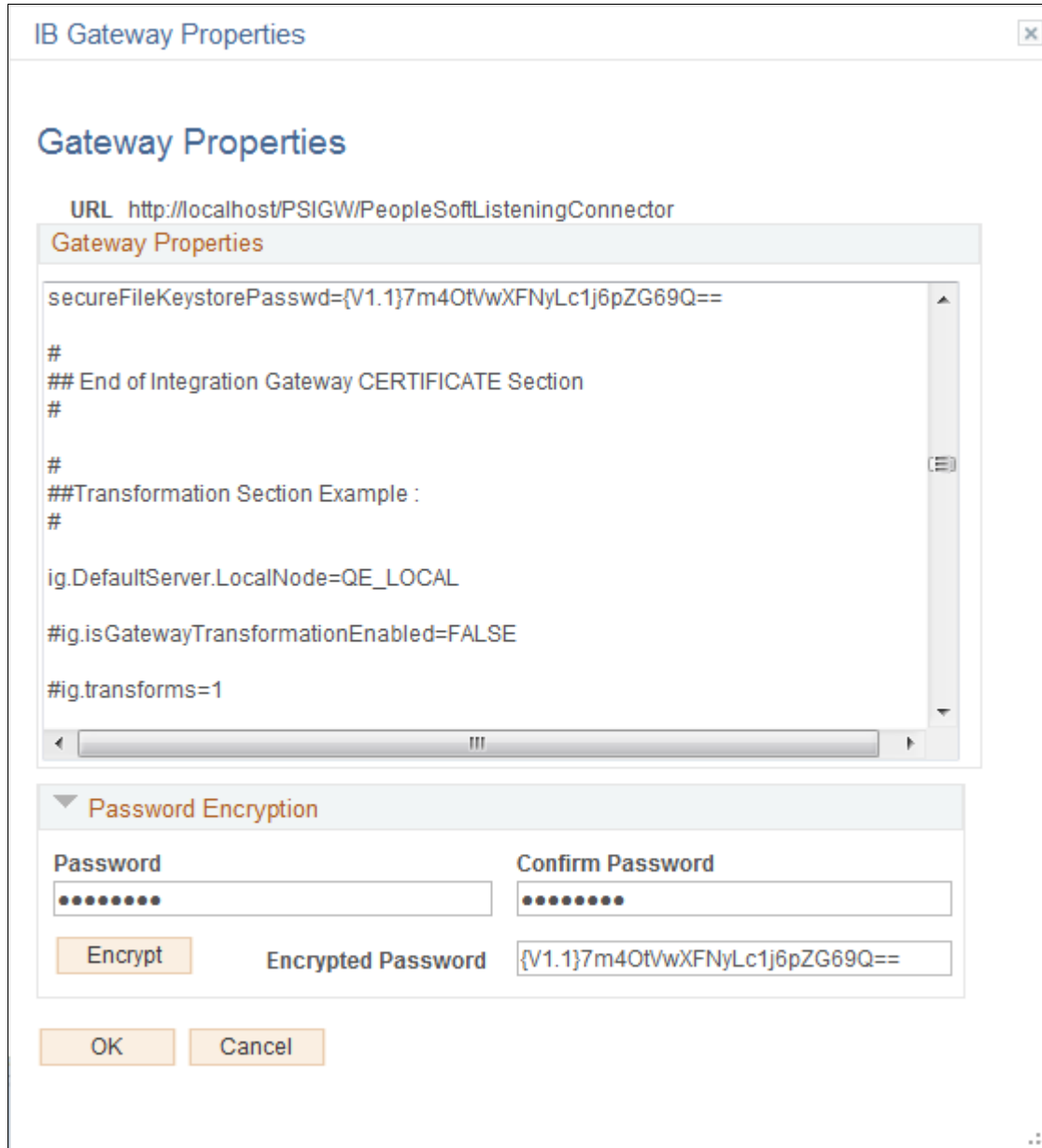


Gateways Properties page

Encrypting the Password for the secureKeystore

Use the Password Encryption Utility section to encrypt the password for the secureKeystore and then add that password to your Gateway properties.

1. On the Gateway Properties page, click the arrow to expand the Password Encryption section, as shown in the following example:



Gateway Properties page showing the Password Encryption utility

2. In the Password Encryption section, add the secure file keystore as follows:
 - In the Password field, enter *password*.
 - In the Confirm Password field, enter *password*.
 - Click the Encrypt button to encrypt the password.
3. After you encrypt the password, copy and paste it from the Encrypted Password field to the Gateway Properties (paste it after secureFileKeystorePasswd=).
For example: secureFileKeystorePasswd={V1.1}7m40tVwXFNyLc1j6pZG69Q==
4. Click OK.

Task 14-3-3: Setting Up Mapping

This section discusses:

- Understanding the Mapping Setup
- Configuring Static or Dynamic Mapping

Understanding the Mapping Setup

You must define the Mapping setup to map the PSFT record and field structure to the Partner field structure.

The two types of mapping are described as follows:

- **Dynamic:** Use for XREF tables that change occasionally (add/update/delete).
Use to map fields to values that will change occasionally and will need more maintenance in the future (such as degree codes, major codes, and so on).
- **Static:** Use for system codes (such as gender) that change rarely but that contain a different set of values for use by candidates.

Use to map fields (such as status fields, email type, and so on) whose values will change little in the future.

The following table lists several maps along with their type, elements, PSFT domain, and HRXML domain. You should create mappings for the items in the table according to the examples in the table for both mapping types:

Map Name	Type	Elements (Type and Length)	PSFT Domain (Uniqueness)*	HRXML Domain (Uniqueness)
PhoneTypeDVM	Static	PHONE_TYPE (String, 4) PHONE_TP (String, 20)	PHONE_TYPE (Unique)	PHONE_TP (Unique)
CountryCodeXREF	Dynamic	COUNTRY (String, 3) COUNTRCODE (String, 3)	COUNTRY (Unique)	COUNTRYCODE (Unique)
EmailTypeDVM	Static	E_ADDR_TYPE (String, 4) EMAIL_TP (String, 20)	E_ADDR_TYPE (Unique)	EMAIL_TP (Unique)
CompetencyXREF	Dynamic	COMPETENCY (String, 8) COMPETENCY_CO DE (String, 50)	COMPETENCY (Unique)	COMPETENCY_CO DE (Unique)
DegreeXREF	Dynamic	ACCOMPLISHMENT (String, 8) DEGREE (String, 50)	ACCOMPLISHMENT (Unique)	DEGREE (Unique)

Map Name	Type	Elements (Type and Length)	PSFT Domain (Uniqueness)*	HRXML Domain (Uniqueness)
LanguageXREF	Dynamic	ACCOMPLISHMENT (String, 8) LANGUAGE (String, 3)	ACCOMPLISHMENT (Unique)	LANGUAGE (Unique)
LicenseXREF	Dynamic	ACCOMPLISHMENT (String, 8) LICENSE (String, 50)	ACCOMPLISHMENT (Unique)	LICENSE (Unique)
MajorXREF	Dynamic	MAJOR_CODE (String, 10) MAJOR (String, 50)	MAJOR_CODE (Unique)	MAJOR (Unique)
MembershipXREF	Dynamic	ACCOMPLISHMENT (String, 8) MEMBERSHIP (String, 50)	ACCOMPLISHMENT (Unique)	MEMBERSHIP (Unique)
SchoolXREF	Dynamic	COUNTRY (String, 3) SCHOOL_CODE (String, 10) COUNTRY_CODE (String, 3) SCHOOL (String, 50)	COUNTRY SCHOOL_CODE (Unique)	COUNTRY_CODE SCHOOL (Unique)
StateCodeXREF	Dynamic	COUNTRY (String, 3) STATE (String, 6) COUNTRYCODE (String, 3) STATECODE (String, 6)	COUNTRY STATE (Unique)	COUNTRYCODE STATECODE (Unique)

Note. * PSFT Domain Uniqueness is a suggested parameter. Depending on the Resume Parsing Provider, it should be *Non Unique*.

Configuring Static or Dynamic Mapping

You can use the preceding table and content, along with these general configuration steps and the static and dynamic mapping examples that follow, to assist you in defining your mapping setup.

To configure either static or dynamic mapping:

1. Select Enterprise Components, Integration Definitions, Transformation Framework, Define Value Maps.
2. Search and select a map.
3. On the Elements page, specify the field names, types, and lengths for all of the domains.

The field name, Data Type, and length must match the system specifications for each domain.

For example, under the PSFT domain, the field name, type, and length must exactly match the record that you used as the information source.

In the preceding table, the field name, type, and length under PSFT Domain came from the actual system. However, the field name, type, and length under HRXML Domain is sample data that can vary from supplier to supplier.

Note. The mappings in the preceding table are available to use but are *optional*. If you map just a few, the Resume Parsing process works without errors, but only for the fields that you mapped.

4. On the Domains page, select the corresponding field under each domain.

Note. You must name at least two parties as domains: one for the PeopleSoft system and the others for the additional component (third-party) systems.

5. Repeat these steps for each map.

The following example shows a Static Map of the Elements page:

Oracle
 Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Integration Definitions ▾ > Transformation Framework ▾ > Define Value Maps

Elements Domains

Map Name PhoneTypeDVM Type Static

*Description Phone Type DVM Options

Comments Phone Type DVM

Assign Elements to Maps						Personalize	Find	First	1-3 of 3	Last
Order	*Element Name	*Data Type	Length	Required						
1	UniqueGUID	String	36	<input checked="" type="checkbox"/>	+ -					
2	PHONE_TYPE	String	4	<input checked="" type="checkbox"/>	+ -					
3	PHONE_TP	String	20	<input checked="" type="checkbox"/>	+ -					

Export

Delete

Save Return to Search Previous in List Next in List Notify Add Update/Display

Elements | Domains

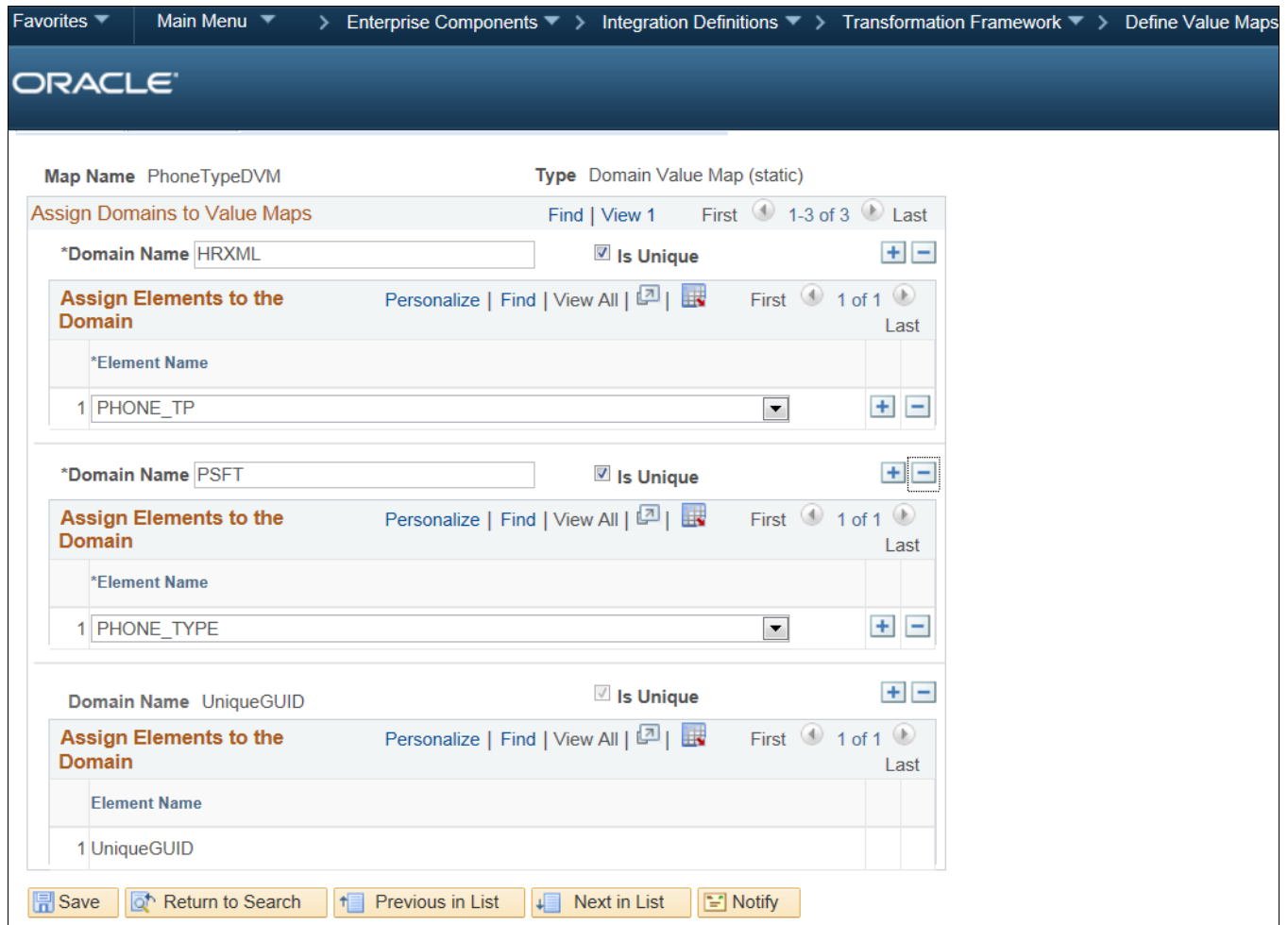
Example of a Static Map - Elements page

The preceding Static Map example of the Elements page contains the following fields and example values:

- Map Name: *PhoneTypeDVM*
- Description: Enter a description for this map name.
For example: *Phone Type DVM*.
- Comments: For example, *Phone Type DVM*.
The Assign Elements to Maps group box contains the following fields and example values:
- Order: Enter the sequence order.
For example: *1*.
- Element Name: Enter the name of the element.
For example: *UniqueGUID*.
- Data Type: Select a data type from the drop-down list box.
For example: *String*.
- Length: Enter the character length.
For example: *36*.
- Required: Select or deselect the check box.
This example shows the Required check box selected.
- Add (+)/Delete (-) buttons to add to or remove from the preceding line of values in the Assign Elements to

Maps group box.

The following example shows a Static Map of the Domains page:



Example of a Static Map - Domains page

The preceding Static Map example of the Domains page contains the following fields and example values:

- Map Name: *PhoneTypeDVM*
- Type: *Domain Value Map (static)*
- The Assign Domains to Value Maps group box contains the following fields and example values:
 - Domain Name: Enter the name of the domain.
For example: *HRXML*.
 - Is Unique: Select or deselect this check box.
This example shows the Is Unique check box selected.
 - Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Domains to Value Maps group box.
 - The Assign Elements to the Domain group box contains the following fields and example values:
 - Element Name: Select an element name from the drop-down list box.
For example: *PHONE_TP*.

- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.
- Domain Name: Enter the name of the domain.
For example: *PSFT*.
- Is Unique: Select or deselect this check box.
This example shows the Is Unique check box selected.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.
The Assign Elements to the Domain group box contains the following fields and example values:
- Element Name: Select an element name from the drop-down list box.
For example: *PHONE_TYPE*.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.

The following example shows a Dynamic Map of the Elements page:

The screenshot shows the Oracle PeopleSoft interface for defining a value map. The breadcrumb trail is: Favorites > Main Menu > Enterprise Components > Integration Definitions > Transformation Framework > Define Value Maps. The page title is 'ORACLE'. There are two tabs: 'Elements' (selected) and 'Domains'. The 'Map Name' is 'CountryCodeXREF' and the 'Type' is 'Dynamic'. The '*Description' field contains 'Country Code XREF' and the 'Comments' field contains 'Country Code XREF'. Below this is the 'Assign Elements to Maps' section, which includes a table with columns: Order, *Element Name, *Data Type, Length, and Required. The table contains three rows: 1. UniqueGUID (String, 36, Required), 2. COUNTRY (String, 3, Required), and 3. COUNTRYCODE (String, 3, Required). There are also buttons for 'Export', 'Delete', 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', and 'Update/Display'.

Order	*Element Name	*Data Type	Length	Required
1	UniqueGUID	String	36	<input checked="" type="checkbox"/>
2	COUNTRY	String	3	<input checked="" type="checkbox"/>
3	COUNTRYCODE	String	3	<input checked="" type="checkbox"/>

Example of a Dynamic Map - Elements page

The preceding Dynamic Map example of the Elements page contains the following fields and example values:

- Map Name: *CountryCodeXREF*
- Type: *Dynamic*
- Description: Enter a description for this map name.
For example: *COUNTRYXREF*.

- Comments: *COUNTRYXREF*

The Assign Elements to Maps group box contains the following fields and example values:

- Order Enter the sequence order.
For example: *1*.
- Element Name: Enter the name of the element.
For example: *UniqueGUID*.
- Data Type: Select from the drop-down list box.
For example: *String*.
- Length: Enter the character length.
For example: *36*.
- Required—select/clear the check box.
This example shows the Required check box selected.

- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to Maps group box.

The following example shows a Dynamic Map of the Domains page:

The screenshot displays the Oracle PeopleSoft interface for defining value maps. The breadcrumb trail at the top reads: Favorites > Main Menu > Enterprise Components > Integration Definitions > Transformation Framework > Define Value Maps. The page title is "ORACLE".

At the top left, there are tabs for "Elements" and "Domains". The main content area shows a configuration for a dynamic map:

- Map Name:** CountryCodeXREF
- Type:** Cross-reference (dynamic)

Below this, there are three sections for "Assign Domains to Value Maps":

- *Domain Name:** HRXML
 - Is Unique:**
 - Assign Elements to the Domain:**
 - *Element Name:** COUNTRYCODE
- *Domain Name:** PSFT
 - Is Unique:**
 - Assign Elements to the Domain:**
 - *Element Name:** COUNTRY
- Domain Name:** UniqueGUID
 - Is Unique:**
 - Assign Elements to the Domain:**
 - Element Name:** UniqueGUID

At the bottom of the configuration area, there are buttons for "Save", "Return to Search", "Previous in List", "Next in List", and "Notify".

Example of a Dynamic Map - Domains page

The preceding Dynamic Map example of the Domains page contains the following fields and example values:

- Map Name: *CountryCodeXREF*
- Type: *Cross-reference (dynamic)*

The Assign Domains to Value Maps group box contains the following fields and example values:

- Domain Name: Enter the name of the domain.
For example: *HRXML*.
- Is Unique: Select or deselect this check box.
This example shows the Is Unique check box selected.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Domains to Value Maps group box.

The Assign Elements to the Domain group box contains the following fields and example values:

- Element Name: Select an element name from the drop-down list box.
For example: *COUNTRYCODE*.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.
- Domain Name: Enter the name of the domain.
For example: *PSFT*.
- Is Unique: Select/clear check box.
This example shows the Is Unique check box selected.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.
The Assign Elements to the Domain group box contains the following fields and example values:
- Element Name: Select an element name from the drop-down list box.
For example: *COUNTRY*.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.

Task 14-3-4: Assigning Mapping Setups

To assign mapping setups for all of the maps that you want PeopleSoft Staffing to use:

1. Select Set Up Financials/Supply Chain, Product Related, Staffing, Integration Suppliers, Mapping Setup. The Mapping Setup page appears.

Search and select the values required in the Mapping Setup page, as shown in the following example:

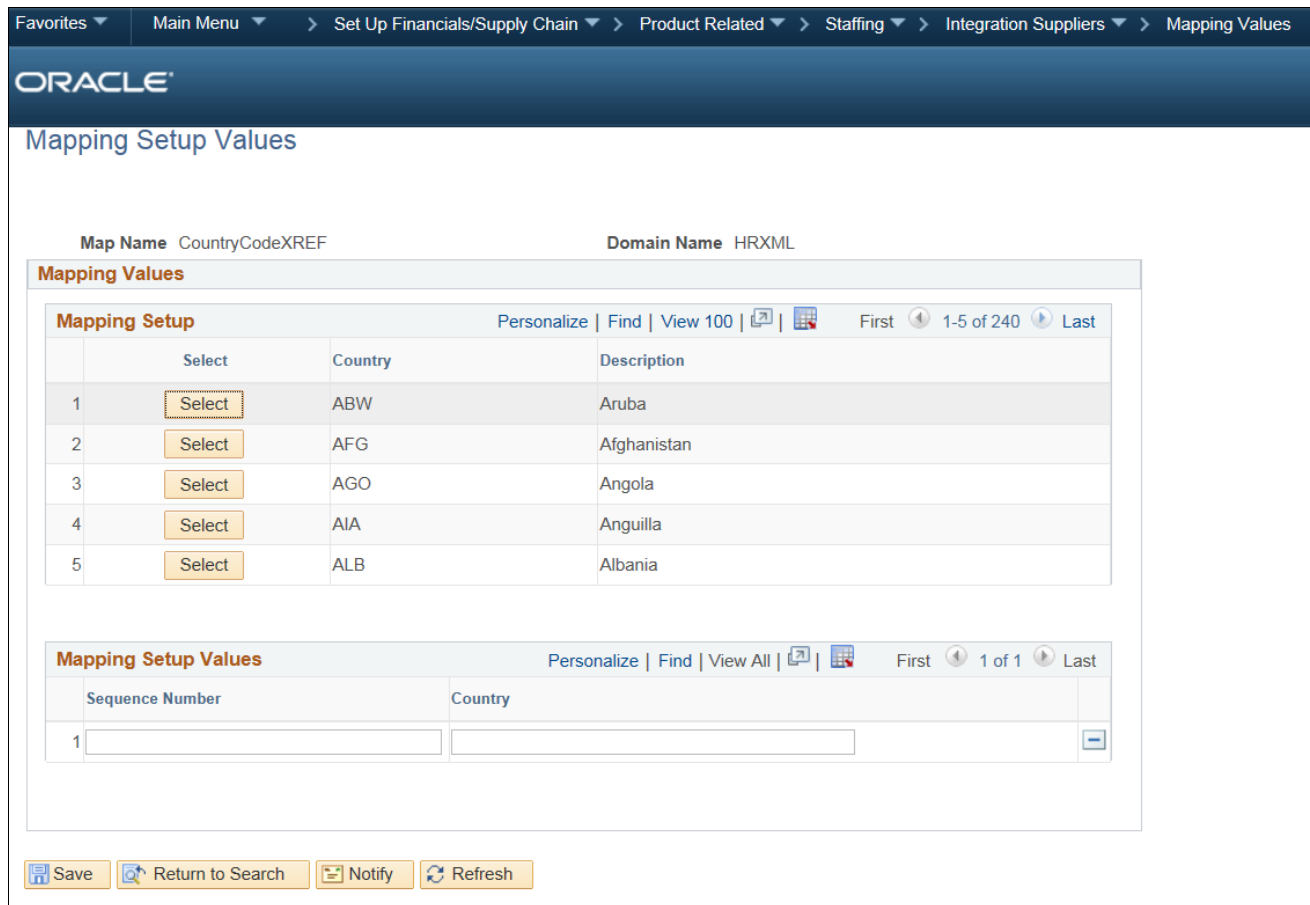
Mapping Setup page

2. On the Mapping Setup page, in the Staffing Element field, select a staffing element from the drop-down list box.
For example: *Country Code*.
The staffing element is system data.
3. In the Map Name field, click the lookup button to search for and select the map name that you want to use.
For example: *CountryCodeXREF*.
In previous setup steps, you created the available map names.
4. In the Domain Name field, click the lookup button to search for and select the domain that you want to use.
For example: *HRXML*.
In previous setup steps, you created the available domain names.
5. Click Save.
6. Repeat the preceding steps to assign mapping setups for all of the maps that you want PeopleSoft Staffing to use.

Task 14-3-5: Defining Mapping Values

To define the corresponding values for all of the maps that you want PeopleSoft Staffing to use.

1. Select Set Up Financials/Supply Chain, Product Related, Staffing, Integration Suppliers, Mapping Values. The Mapping Setup Values page appears, as shown in the following example:



Mapping Setup Values page

2. On the Mapping Setup Values page, in the Mapping Setup group box, click the Select button next to each mapping setup to define the mapping values.
The Mapping Setup Values group box allows editing of the sequence number and country for the mapping setups that you select.
3. Edit the sequence and country.
4. Click Save.
5. Repeat the preceding steps to define mapping values for all of the maps that you want PeopleSoft Staffing to use.

Note. Before you can use the Resume Parsing feature, you must define the supplier at Set Up Financials/Supply Chain, Product Related, Staffing, Integration Suppliers, Supplier Integration Setup.

See the product documentation for PeopleSoft FSCM: Staffing Front Office for additional information on installation options, supplier setup, and mapping configuration.

Chapter 15

Integrating PeopleSoft Transaction Billing Processor with PeopleSoft Customer Relationship Management

This chapter discusses:

- Understanding PeopleSoft Transaction Billing Processor and PeopleSoft Customer Relationship Management Integration
- Activating the Integration Queues
- Activating the Integration Services and Routings
- Transforming the Contract Transaction Service

Understanding PeopleSoft Transaction Billing Processor and PeopleSoft Customer Relationship Management Integration

The following instructions detail the process to integrate PeopleSoft 9.2 Transaction Billing Processor (TBP) with the PeopleSoft 9.2 Customer Relationship Management (CRM) database. PeopleSoft Real Estate Management (REM) also uses PeopleSoft TBP functionality; however, because it is in the same database, REM does not require any additional setup.

Only perform the following tasks if you want to integrate your PeopleSoft FSCM and PeopleSoft CRM databases.

Task 15-1: Activating the Integration Queues

To turn on the integration queues (channels):

1. Sign in to PeopleSoft Pure Internet Architecture (PIA).
2. Select PeopleTools, Integration Broker, Integration Setup, Queues.

- On the Queues search page, search for and select the queue name *CONTRACT*.

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

The screenshot shows the Oracle Queue Definitions page for the 'CONTRACT' queue. The page includes the following elements:

- Queue Name:** CONTRACT
- Description:** Contracts
- Comments:** (Empty text area)
- Archive:** Archive
- Unordered:** Unordered
- Queue Status:** Run (dropdown menu)
- Owner ID:** Contracts (dropdown menu)
- Operations Assigned to Queue:**

Service Operation	Version
CONTRACT_REQUEST	VERSION_1
CONTRACT_RESPONSE	VERSION_1
CONTRACT_TXN	VERSION_1
CONTRACT_TXN	VERSION_2
PENDING_ACTIVITY	VERSION_1
- Define Partitioning Fields:**

Include	Field	Alias Name
<input type="checkbox"/>	OPERATIONNAME	
<input type="checkbox"/>	PUBLISHER	
<input type="checkbox"/>	PUBPROC	

Buttons at the bottom include 'Save', 'Add Field', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

Queue Definitions page

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

Task 15-2: Activating the Integration Services and Routings

This section discusses:

- Understanding Integration Service and Routing Activation
- Understanding New Routing Definition Creation
- Activating the Integration Services and Configuring the Routing Definition

Understanding Integration Service and Routing Activation

You must activate the following four services:

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

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

However, sender and receiver nodes are *only* editable when you are creating the new routing. After you create and save the routing, you cannot modify the sender and receiver nodes.

Therefore, you may need to create new routings to edit your sender and receiver nodes. You can create multiple routing instances with different names for the same service operation. In the example case in the steps that follow, CONTRACT_REQUEST is one instance and CONTRACT_REQUEST1 is another instance.

Because the routings that the PeopleSoft system delivers are already created and the nodes are no longer editable, you must configure your nodes. Use one of the following three methods described here:

- Configure the nodes PSFT_CR and PSFT_EP with the valid databases so that the Sender node PSFT_CR and Receiver node PSFT_EP are valid and functional.
- Delete the routing (CONTRACT_REQUEST) that the PeopleSoft system supplies and then create a new instance of the service operation.
- Create a *new* routing instance of the service operation with a different name (CONTRACT_REQUEST1 as shown in the steps that follow) and then supply the proper sender and receiver nodes (a prerequisite).

Note. Creating a new routing instance of the service operation with a different name is the method that is detailed in the steps that follow. If you use one of the other methods, verify that the correct routings are active by selecting PeopleTools, Integration Broker, Integration Setup, Services. Open each service operation and select the Routings tab to verify its status.

Understanding New Routing Definition Creation

Use the information in this section to help you determine how to configure the new routing definition in the following section. Activating the Integration Services and Configuring the Routing Definition.

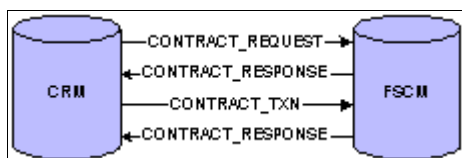
As a prerequisite, you must know which databases you are integrating. In the example of CONTRACT_REQUEST, the sender node will be the PeopleSoft CRM database and the receiver node will be the PeopleSoft FSCM database. The receiver node is always the target database. In the case of CONTRACT_RESPONSE,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

The service operations (messages) flow is as follows:

1. PeopleSoft CRM sends CONTRACT_REQUEST to PeopleSoft FSCM.
2. PeopleSoft FSCM sends CONTRACT_RESPONSE to PeopleSoft CRM.

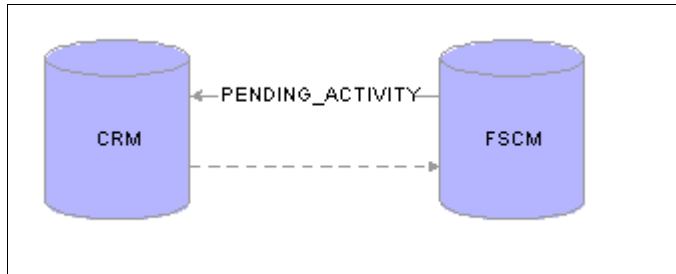
For Recurring and One-Time transactions, this message is sent only once. For On-Demand Transactions, the system sends this message for a second time, after the Contracts Billing Interface (CA_BI_INTFC) process completes, to provide the status of the transactions to PeopleSoft CRM.

3. PeopleSoft CRM sends CONTRACT_TXN to PeopleSoft FSCM, as shown in the following database integration diagram:



Database Integration diagram

4. The PENDING_ACTIVITY service operation is sent from PeopleSoft FSCM to PeopleSoft CRM, where the system is configured for synchronous messages, as shown in the following pending activity diagram:



Pending Activity diagram

5. The message identifies whether any pending activities exist for a contract Revenue Plan or Billing Plan. When the status of a Billing Plan or Revenue Plan changes to Complete, the system triggers the message.

Note. If the node fields are grayed out and unavailable for edit, you can create a new routing and configure that routing with the nodes that you are configuring.

Task 15-2-1: Activating the Integration Services and Configuring the Routing Definition

To activate the integration services (messages):

1. Sign in to PeopleSoft Pure Internet Architecture.
2. Select PeopleTools, Integration Broker, Integration Setup, Services.
3. On the Services search page, search for and select the service name *CONTRACT_REQUEST*.
4. Open and activate the service operation by doing one of the following:

- a. Directly open a service operation.

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

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

Service	Service Alias	Object Owner ID	Description
CONTRACT_REQUEST		Contracts	Contract Request
CONTRACT_RESPONSE		Contracts	Contract Response
CONTRACT_TXN		Contracts	Contract Transactions

Services – Search page

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

Each service has a corresponding service operation that the PeopleSoft system delivers. For each of the service operations in the preceding list, you can open the service that has the same name.

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

The screenshot shows the Oracle PeopleTools interface for the 'Services' page. The breadcrumb trail is: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Services. The page title is 'Services'. The service name is 'CONTRACT_REQUEST' with a checkbox for 'REST Service Type'. The description is 'Contract Request'. There are fields for 'Comments', 'Service Alias', 'Owner ID' (set to 'Contracts'), and '*Namespace' (set to 'http://'). Below these are three buttons: 'Link Existing Operations', 'View WSDL', and 'Provide Web Service'. The 'Service Operations' section has a 'Service Operation' field and an 'Operation Type' dropdown with an 'Add' button. The 'Existing Operations' section has a table with columns: Operation, Message Links, Operation.Default Version, Description, Active, and Operation Type. The table contains one row: 'CONTRACT_REQUEST.VERSION_1', 'Contract Request', an unchecked checkbox, and 'Asynch'. At the bottom are 'Save', 'Return to Search', and 'Add' buttons.

Services – Service Operation Request page

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

After you open a service operation using either of these options, you can activate and configure it.

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

The screenshot displays the Oracle Service Operation configuration page for the 'CONTRACT_REQUEST' service operation. The 'General' tab is active, showing various configuration options. The 'Default Service Operation Version' section is highlighted, showing 'VERSION_1' as the default version, which is also marked as 'Active'. The 'Routing Status' table indicates the status of different routing types: 'Any-to-Local' exists, while 'Local-to-Local' and 'Local-to-Atom' do not. The 'Message Information' section shows the message type as 'Request' and the queue name as 'CONTRACT'. At the bottom, there are buttons for 'Save', 'Return to Service', and 'Add Version'.

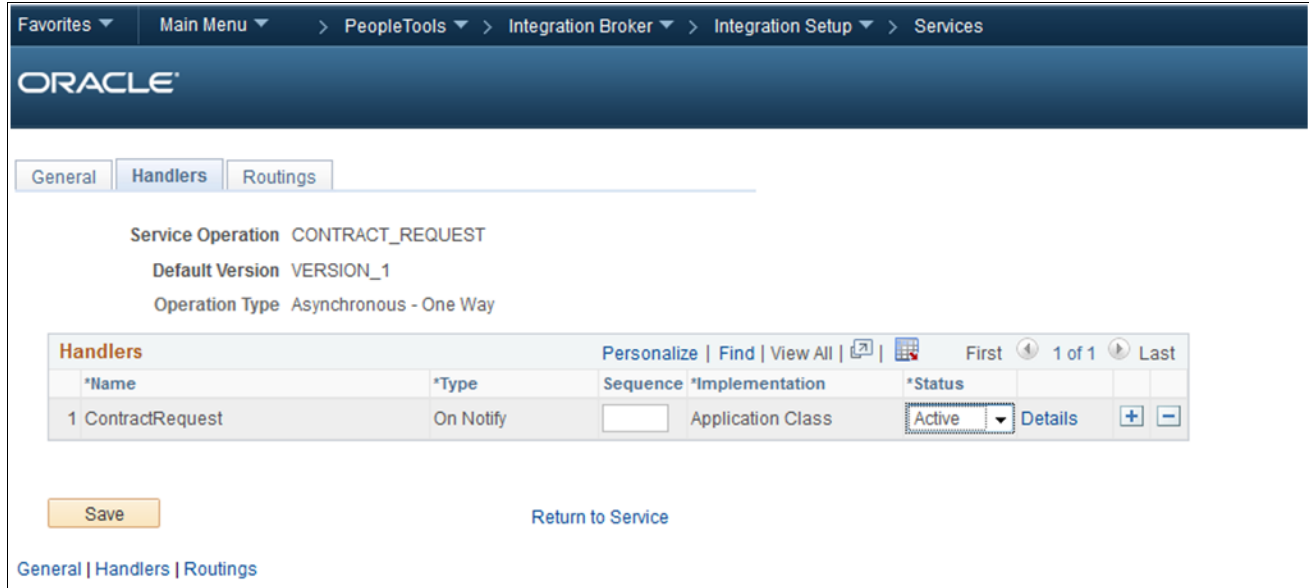
Service Operation page: General tab

- 6. Click Save.
- 7. Select the Handlers tab to access the Handlers page.

8. On the Handlers page, if any handlers are listed, select *Active* from the Status drop-down list box.

In the example that follows, the status is set to *Active* for the handler name *ContractRequest*.

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



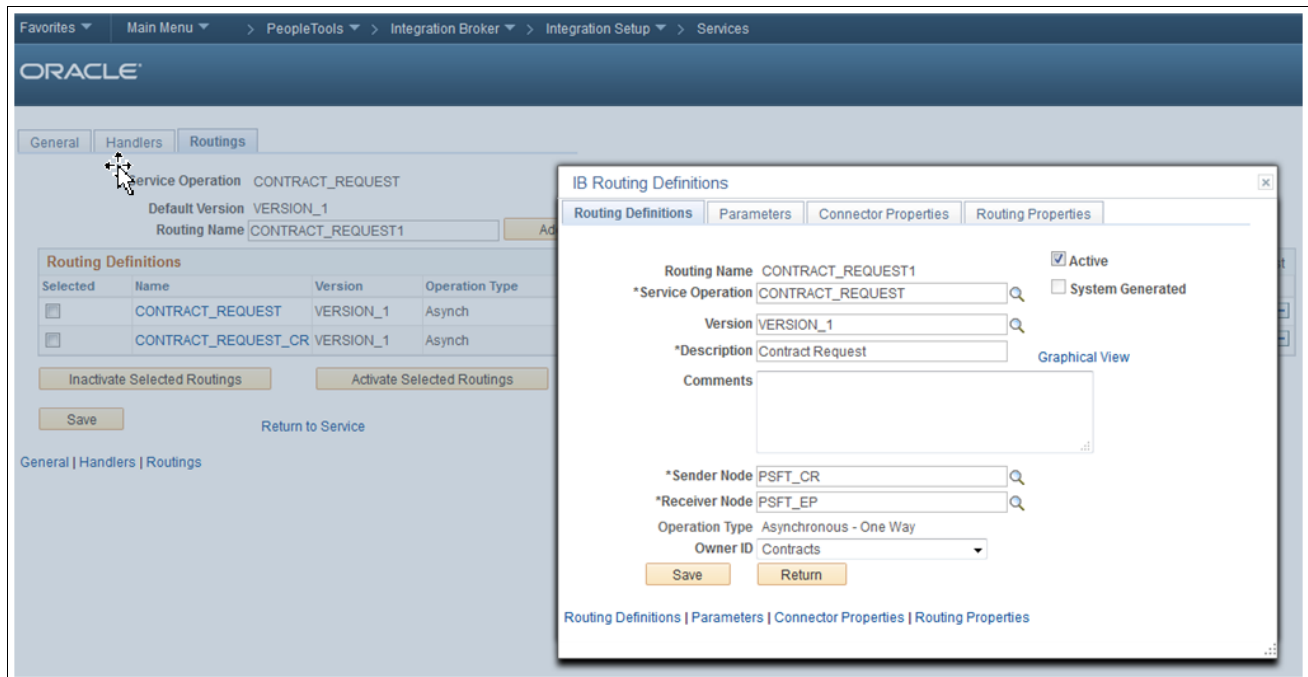
Service Operation page: Handlers tab

9. Select the Routings tab to access the Routings page.

10. On the Routings page, in the Routing Name field, enter a value such as *CONTRACT_REQUEST1*.

11. Click the Add (+) button to add the new routing.

The Routing Definitions page for the routing CONTRACT_REQUEST1 appears, as shown in the following example:



Routing Definitions page

12. Review the discussion and prerequisite details in the previous section, Understanding New Routing Definition Creation, *before* you configure the new routing definition in the next step.

13. Configure the new routing definition as follows:

- Select the Active check box.
- In the Sender Node field, enter the correct sender node.
- In the Receiver Node field, enter the correct receiver node.
- In the Owner ID field, enter the correct object owner ID, if applicable.

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

e. Click Save.

14. Repeat the preceding steps for the following service operations (messages):

- CONTRACT_RESPONSE
- CONTRACT_TXN (VERSION_2)
- PENDING_ACTIVITY

Task 15-3: Transforming the Contract Transaction Service

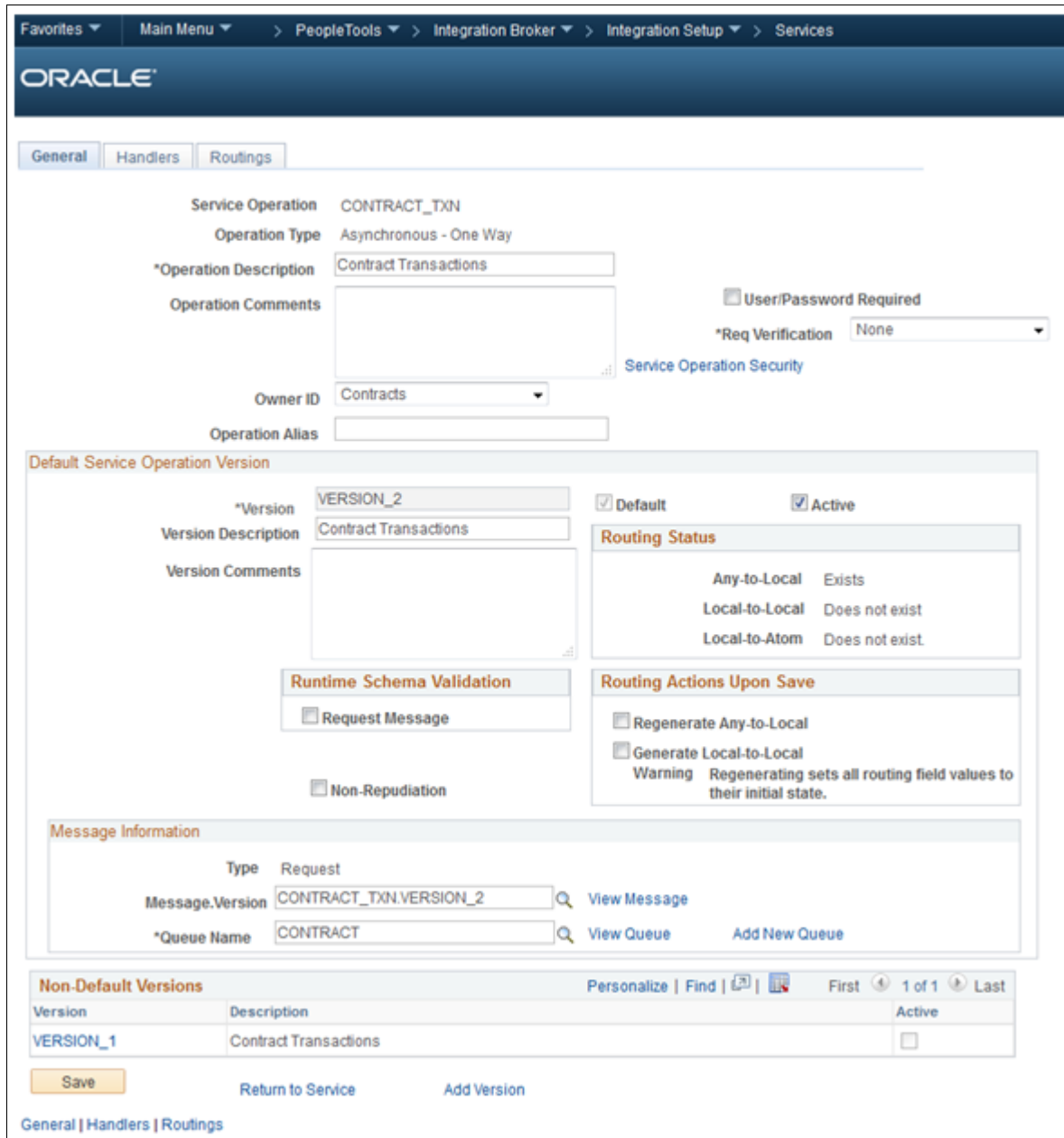
PeopleSoft Contracts in PeopleSoft FSCM uses `CONTRACT_TXN` version 2 for all of the processing that relates to the PeopleSoft Transaction Billing Processor. PeopleSoft CRM uses `CONTRACT_TXN` version 1. The default version is version 1 in PeopleSoft CRM, whereas it is version 2 in PeopleSoft FSCM. Because of the difference in the versions of the same message, you must set up the transformation of incoming message version 1 from PeopleSoft CRM to version 2 in PeopleSoft FSCM.

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

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

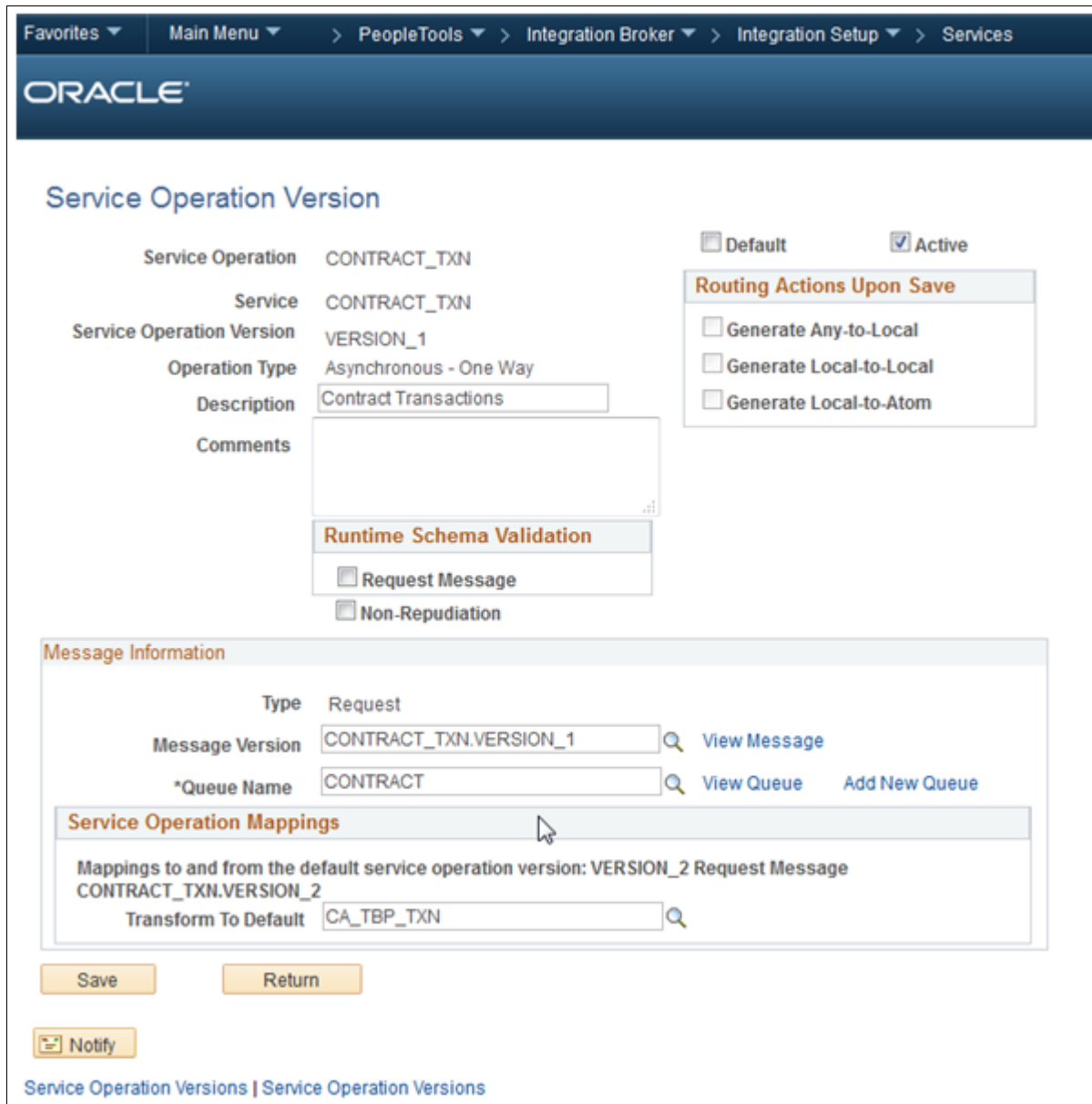
Alternatively, select PeopleTools, Integration Broker, Integration Setup, Services and search for service name `CONTRACT_TXN`.

- 2. Click the CONTRACT_TXN.VERSION_2 link in the Operation tab of the Existing Operations section. The Service Operation page for CONTRACT_TXN appears, as shown in the following example:



Service Operation page: General tab

- On the Service Operation - General page, in the Non-Default Versions group box, click the VERSION_1 link to open the Non-Default Version - VERSION_1 page for CONTRACT_TXN, as shown in the following example:

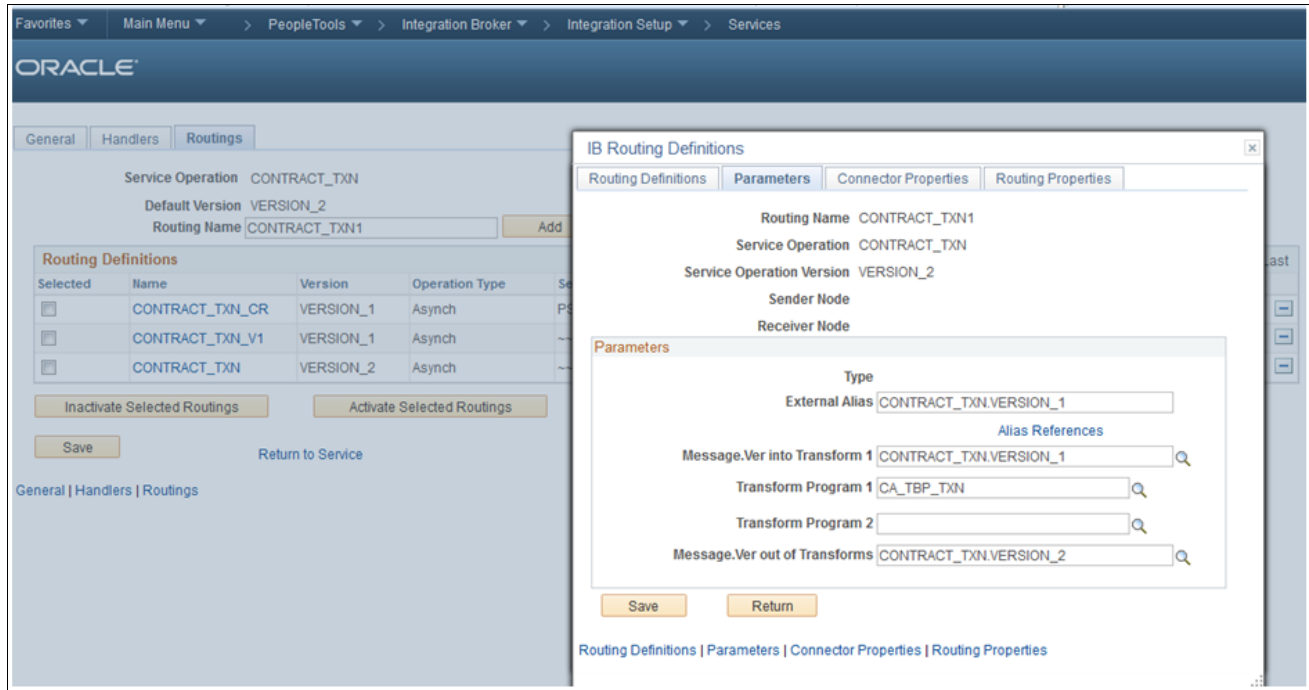


Service Operation Version page

- Enter the values shown in the preceding example.
- Select the Active check box to activate the service operation.
- Select Save and then click Return.
- Select the Routings tab to access the Routings page.
- On the Routings page, click the routing link that you added or activated in the previous task.
- Select the Parameters tab to access the Parameters page.
- On the Parameters page, in the Application Engine name field, enter *CA_TBP_TXN* for Transform Program 1.
- In the External Alias field, enter *CONTRACT_TXN.VERSION_1*.

12. In the Message.Ver into Transform 1 field, enter *CONTRACT_TXN.VERSION_1*.

13. In the Message.Ver out of Transforms field, enter *CONTRACT_TXN.VERSION_2*, as shown in the following example:



IB Routings Definitions page: Parameters tab

14. Click Save.

15. Clear the Application Server and Web Server cache before you use the system.

Note. The installation of PeopleSoft Transaction Billing Processor 9.2 for PeopleSoft FMS is now complete.

See Also

PeopleSoft CRM: Services Foundation, "Setting Up an Integration to the Transaction Billing Processor"

Chapter 16

Installing PeopleSoft 9.2 Maintenance Management with Microsoft Project 2007/2010

This chapter discusses:

- Understanding the Integration with Microsoft Project
- Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine
- Installing Microsoft Project 2007/2010
- Configuring the Microsoft Project Integration Process

Understanding the Integration with Microsoft Project

This chapter describes the integration of PeopleSoft Maintenance Management with Microsoft Project 2007 or Microsoft Project 2010. The integration procedure includes the following tasks:

Important! It is important that you carry out these tasks in the order given in this chapter.

1. Set up a PeopleSoft Process Scheduler server on a Microsoft Windows machine to run against the PeopleSoft 9.2 Maintenance Management database.
The integration with Microsoft Project 2007 or Microsoft Project 2010 uses a PeopleSoft Process Scheduler server to communicate with the Microsoft Project.
2. Install the Microsoft Project 2007 or Microsoft Project 2010 software on the PeopleSoft Process Scheduler server.
3. Configure the Integration process.

See the product documentation for PeopleSoft FSCM: Maintenance Management for more information about PeopleSoft Maintenance Management integration with Microsoft Project.

Task 16-1: Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine

Follow the standard installation instruction to install PeopleSoft PeopleTools on a Microsoft Windows machine, and then configure that machine as a process scheduler to connect to the PeopleSoft 9.2 FSCM database where the PeopleSoft Maintenance Management product resides.

See the PeopleTools installation guide for your database platform, "Setting up Process Scheduler on Windows."

Task 16-2: Installing Microsoft Project 2007/2010

Install Microsoft Project 2007 or Microsoft Project 2010 on the same Microsoft Windows machine where the PeopleSoft Process Scheduler server resides.

Important! You should not install the PeopleSoft-Microsoft Project Integrator on the PeopleSoft Process Scheduler that runs the PeopleSoft Maintenance Management's Microsoft Project integration.

Task 16-3: Configuring the Microsoft Project Integration Process

To configure the integration process:

1. Sign in to PeopleSoft Pure Internet Architecture.
2. Select PeopleTools, Process Scheduler, Processes.
3. On the Process search page, search for and select process name *WM_MSP*.
The Process Definition page appears.
4. On the Process Definition page, select the Process Definition Options tab to access the Process Definition Options page.

- On the Process Definition Options page, in the Server Name field, enter the name of the process scheduler server that you configured in the earlier task titled "Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine," as shown in the following example:

The screenshot displays the Oracle Process Definition Options page for process name WM_MSP. The page is organized into several sections:

- Process Definition Options:**
 - Process Type: Application Engine
 - Name: WM_MSP
 - Server Name: [Text Field]
 - Recurrence Name: [Text Field]
- On File Creation:**
 - File Dependency:
 - Wait For File: [Text Field]
 - Time Out Max Minutes: [Text Field] (value: 5)
- System Recovery Process:**
 - Process Type: [Text Field]
 - Process Name: [Text Field]
- Process Security:**
 - Component:** WM_MSP [Text Field]
 - Process Groups:** WMALL [Text Field]

At the bottom of the page, there are navigation buttons: Save, Return to Search, Notify, Add, and Update/Display. A breadcrumb trail at the very bottom reads: Process Definition | Process Definition Options | Override Options | Destination | Page Transfer | Notification | Message | Runtime Parameters.

Process Definition Options page for process name WM_MSP

- Click Save.
- Select PeopleTools, Process Scheduler, Processes.
The Process search page appears.
- On the Process search page, search for and select process name *WM_MSP_IMP*.
The Process Definition page appears.
- On the Process Definition page, select the Process Definition Options tab to access the Process Definition Options page.

10. On the Process Definition Options page, in the Server Name field, enter the name of the process scheduler server that you configured in the earlier task titled "Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine," as shown in the following example:

The screenshot shows the Oracle Process Definition Options page for process name WM_MSP_IMPORT. The page is titled "ORACLE" and has a navigation bar with "Process Definition Options" selected. The page contains several sections: "Process Type" (Application Engine), "Name" (WM_MSP_IMPORT), "Server Name" (empty), "Recurrence Name" (empty), "On File Creation" (File Dependency: , Wait For File: , Time Out Max Minutes:) and "System Recovery Process" (Process Type: , Process Name:) and "Process Security" (Component: WM_MSP_IMPORT, Process Groups: WMALL). At the bottom, there are buttons for "Save", "Return to Search", "Notify", "Add", and "Update/Display".

Process Definition Options page for process name WM_MSP_IMPORT

11. Click Save.

Chapter 17

Installing PeopleSoft Maintenance Management 9.2 Work Order Attachment Print

This chapter discusses:

- Understanding PeopleSoft Work Order Attachment Print
- Prerequisites
- Verifying the URLs and the Installation Location
- Enabling the PeopleSoft Work Order Attachment Print Features

Understanding PeopleSoft Work Order Attachment Print

PeopleSoft Maintenance Management Work Order Attachment Print utilizes the printing capabilities of many additional component (third-party) applications that support printing files from a command-line interface. A variety of documents that are created using Microsoft Office, such as Microsoft Word, Microsoft PowerPoint, Microsoft Excel, as well as other types of documents such as PDF, TXT, JPEG, GIF and BMP can be printed depending on the chosen additional component application.

Prerequisites

Ensure that you meet the following requirements:

- You have installed an additional component application that allows you to print a list of files of various types to a network printer from a single command-line interface.
- You have installed the additional component application on the PeopleSoft Process Scheduler server that you use to print Work Order Attachments.
This should be the same process scheduler server that you currently use to print the Work Order Task Details report.
- You are running PeopleSoft PeopleTools 8.54.08 or higher.

Note. An instance of the additional component application cannot be running in memory on the server, except as managed by the PeopleSoft Work Order Attachment Print process.

If the additional component application is provided with a quick-start utility, that utility will typically need to be disabled on the server.

Task 17-1: Verifying the URLs and the Installation Location

This section discusses:

- Modifying the Attachment Print Command URL
- Modifying the Attachment Print Directory URL for an Alternate Download Holding Directory

Task 17-1-1: Modifying the Attachment Print Command URL

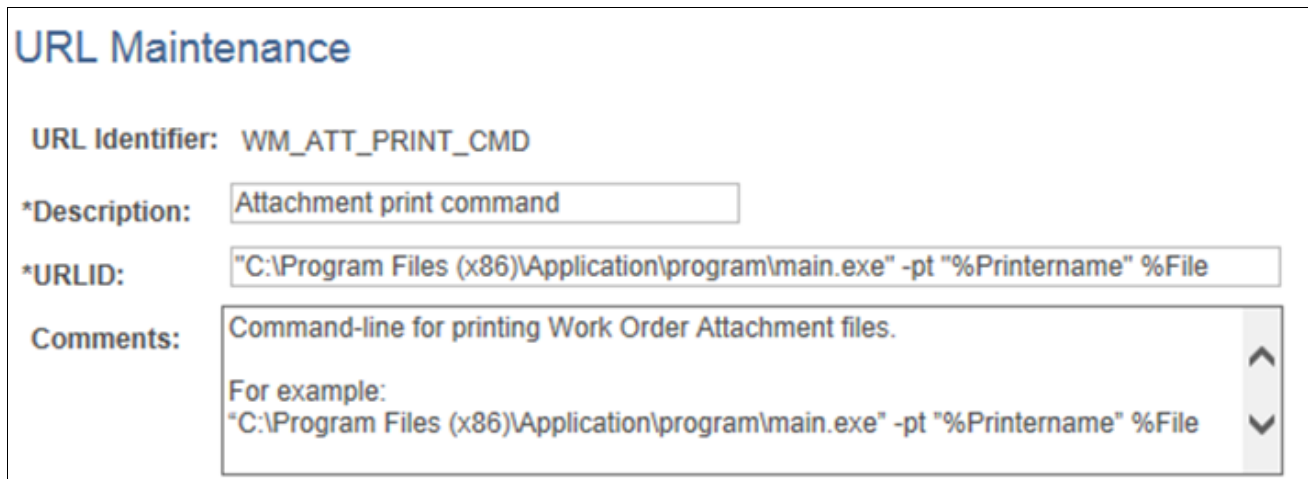
After you install the additional component application, you must update the URL that is used by the PeopleSoft Work Order Attachment Print feature to call the additional component application to print attachments.

The URL WM_ATT_PRINT_CMD must point to the appropriate installation location of the primary additional component application's executable file. This file is typically in the subdirectory that contains the majority of the additional component application's binary executables.

To modify the URL for the additional component application's primary executable installation location:

1. Select PeopleTools, Utilities, Administration, URLs.

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



The screenshot shows the 'URL Maintenance' page with the following fields:

- URL Identifier:** WM_ATT_PRINT_CMD
- *Description:** Attachment print command
- *URLID:** "C:\Program Files (x86)\Application\program\main.exe" -pt "%Printrname" %File
- Comments:** Command-line for printing Work Order Attachment files.
For example:
"C:\Program Files (x86)\Application\program\main.exe" -pt "%Printrname" %File

URL Maintenance page - Attachment print command

2. On the URL Maintenance page, in the URL field, modify the example URL to point to your installation location of the additional component application's primary startup executable and appropriate command-line arguments.

For example: *C:\Program Files (x86)\Application\program\main.exe" -pt "%Printrname" %File*

In the preceding example, *-pt* is the command-line switch that commands the additional component application to print the list of files to a specified network printer.

3. At runtime the place holder %Printrname will be replaced with the network printer name specified in the Output Destination field on the Work Order Task - Details Report Options page. The place holder %File will be replaced with a list of the attachment file(s) to be printed.

For reference, the original example URL is provided in the Comments field of the URL Maintenance page.

Task 17-1-2: Modifying the Attachment Print Directory URL for an Alternate Download Holding Directory

While printing Work Order Attachments, the PeopleSoft Work Order Attachment Print process temporarily downloads the attachments to the server in a holding directory, where they can then be passed on to the additional component application for printing. The URL `WM_ATT_PRINT_DIR` determines the directory to which the Work Order Attachments download. After the attachments print, they are removed from this temporary directory. The PeopleSoft Work Order Attachment Print process automatically creates this directory on the server if it does not already exist.

By default, the URL is set to: `C:\WMONLATT\`

To use a different temporary download holding directory on your server:

1. Select PeopleTools, Utilities, Administration, URLs.

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

URL Maintenance

URL Identifier: `WM_ATT_PRINT_DIR`

*Description:

*URLID:

Comments:

This URL ***MUST*** end with a path delimiter, such as "\".
For example: `C:\WMONLATT\`

URL Maintenance page - Attachment print directory

2. On the URL Maintenance page, modify the default URL `C:\WMONLATT\` to the directory that you want to use.

Note. The slash ("`\`") path delimiter at the end of the Attachment print directory URL is required and must be entered.

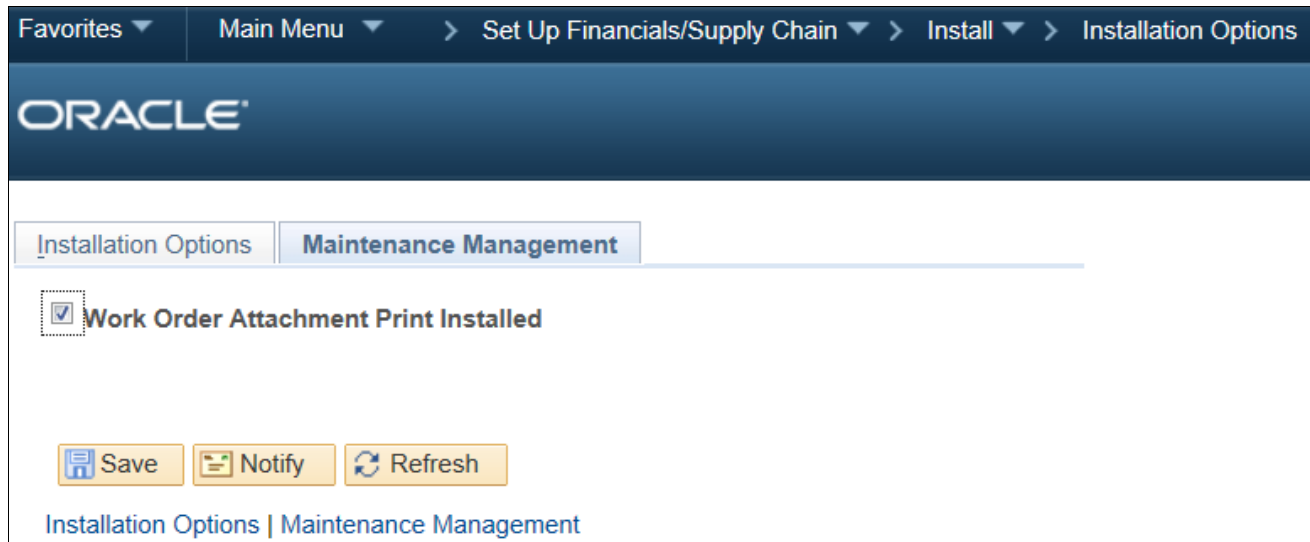
Task 17-2: Enabling the PeopleSoft Work Order Attachment Print Features

After you successfully install the additional component application for printing attachments, you must enable the Print Attachments option that is available for your users on the Work Order Task Detail Report Options page.

To enable the Print Attachments feature:

1. Select Set Up Financials/Supply Chain, Install, Installation Options, and then select the Maintenance Management link.

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



Installation Options - Maintenance Management page

2. On the Maintenance Management page, select Work Order Attachment Print Installed.

See the product documentation for PeopleSoft FSCM: Maintenance Management for user set up and implementation information.

Chapter 18

Integrating PeopleSoft 9.2 Asset Management and Physical Inventory Solutions

This chapter discusses:

- Understanding the Integration of PeopleSoft 9.2 Asset Management with Physical Inventory
- Configuring the Local Gateway
- Configuring the Inbound Nodes
- Activating Service Operations
- Running Message Channel
- Activating the Domain for Asynchronous Messaging

Understanding the Integration of PeopleSoft 9.2 Asset Management with Physical Inventory

PeopleSoft 9.2 Asset Management integrates with additional component (third-party) Physical Inventory Solutions to provide the following functionality:

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

Note. In prior PeopleSoft releases, this feature was only available using flat files. If you do not implement the Physical Inventory feature, or you implement using flat files, the tasks in this chapter are optional.

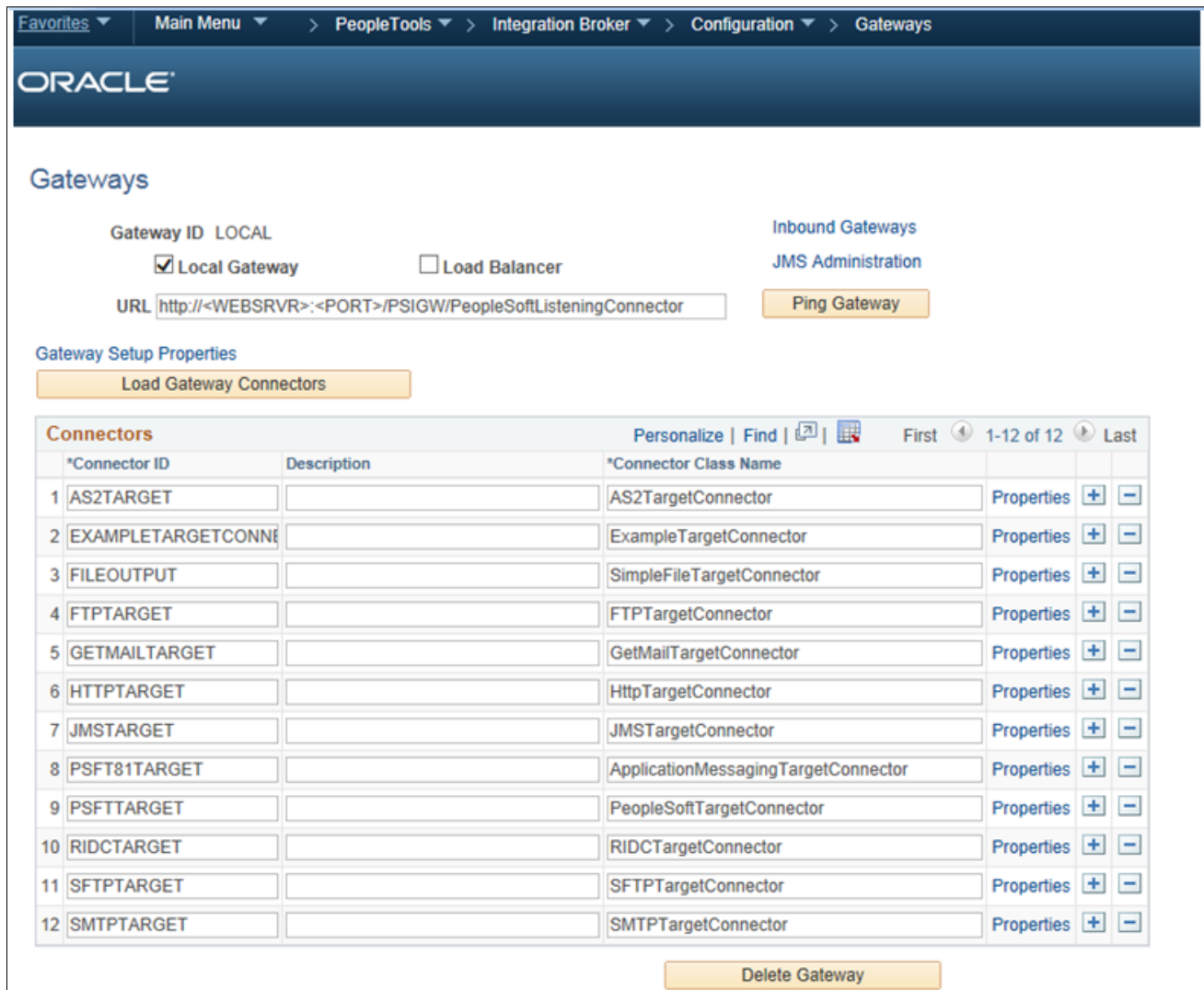
Task 18-1: Configuring the Local Gateway

To configure the Integration Broker local gateway:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
The Gateways search page appears.

- On the Gateways search page, click Search.

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



Gateways page

- On the Gateways page for the Local Gateway, in the URL field, enter the URL as follows:
`http://<WEBSRV>:<PORT>/PSIGW/PeopleSoftListeningConnector`
- Click Save.
- Click the Load Gateway Connectors button.
 This ensures that all of the existing connectors install on the gateway.
- Click Save.
 This completes the installation of the Connectors.

Task 18-2: Configuring the Inbound Nodes

To configure the inbound nodes:

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

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

The screenshot displays the Oracle Node Definitions page for the node *PSFT_XINBND*. The breadcrumb navigation at the top reads: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Nodes. The page title is ORACLE. Below the title, there are tabs for Node Definitions (selected), Connectors, Portal, WS Security, and Routings. The main content area contains the following fields and options:

- Node Name:** PSFT_XINBND
- *Description:** External Inbound node
- *Node Type:** External (dropdown menu)
- *Authentication Option:** None (dropdown menu)
- *Default User ID:** VP1 (text field with search icon)
- WSIL URL:** (text field)
- Hub Node:** (text field with search icon)
- Master Node:** (text field with search icon)
- Company ID:** (text field)
- IB Throttle Threshold:** (text field)
- Image Name:** (text field with search icon)
- Codeset Group Name:** (text field with search icon)
- External User ID:** (text field)
- External Password:** (text field)
- External Version:** (text field)

On the right side, there are three action buttons: Copy Node, Rename Node, and Delete Node. Below the main fields, there are links for Contact/Notes and Properties. At the bottom left, there is a Save button and a Return to Search button. The footer of the page shows the breadcrumb navigation: Node Definitions | Connectors | Portal | WS Security | Routings.

Node Definitions - PSFT_XINBND page

3. On the Node Definitions page, enter the ID of the Asset Management Inventory user in the Default User ID field.
4. Click Save.
5. Click Return to Search.
6. On the Nodes search page, search for and select the node name *ANONYMOUS*.

- On the Node Definitions page, in the Default User ID field, enter the value for Asset Management Inventory user. A Node Definition page is shown in the following example:

The screenshot displays the Oracle Node Definitions page for an anonymous node. The breadcrumb trail at the top reads: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Nodes. The page title is ORACLE. Below the title, there are tabs for Node Definitions, Connectors, Portal, WS Security, and Routings. The main content area contains the following fields and options:

- Node Name:** ANONYMOUS
- *Description:** Used internally by IB system.
- *Node Type:** External (dropdown menu)
- *Authentication Option:** None (dropdown menu)
- *Default User ID:** VP1
- WSIL URL:** (empty text field)
- Hub Node:** (empty text field with search icon)
- Master Node:** (empty text field with search icon)
- Company ID:** (empty text field)
- IB Throttle Threshold:** (empty text field)
- Image Name:** (empty text field with search icon)
- Codeset Group Name:** (empty text field with search icon)
- External User ID:** (empty text field)
- External Password:** (empty text field)
- External Version:** (empty text field)

On the right side, there are three buttons: Copy Node, Rename Node, and Delete Node. Below the main fields, there are checkboxes for: Default Local Node, Local Node, Active Node (checked), Non-Repudiation, and Segment Aware (checked). At the bottom left, there is a Save button and a Return to Search button. At the bottom right, there are links for Contact/Notes and Properties. The footer of the page shows the breadcrumb trail: Node Definitions | Connectors | Portal | WS Security | Routings.

Node Definitions - Anonymous page

- Click Save.

Task 18-3: Activating Service Operations

To activate service operations:

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

2. On the Service Operations search page, search for and select the service operation *GET_PIDATA*. The Service Operations - General page appears, as shown in the following example:

The screenshot displays the Oracle Service Operations - General page for the service operation *GET_PIDATA*. The breadcrumb trail at the top reads: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Service Operations. The Oracle logo is visible in the top left corner. The page has three tabs: General (selected), Handlers, and Routings. The main content area includes the following fields and sections:

- Service Operation:** GET_PIDATA
- Operation Type:** Asynchronous - One Way
- *Operation Description:** AM Physical Inventory Request
- Operation Comments:** AM Physical Inventory Request Details
- User/Password Required:**
- *Req Verification:** None (dropdown)
- Service Operation Security:** (label)
- Owner ID:** Asset Management (dropdown)
- Operation Alias:** (empty text field)

The **Default Service Operation Version** section contains:

- *Version:** v1
- Version Description:** AM Physical Inventory Request
- Version Comments:** (empty text area)
- Default:**
- Active:**

The **Routing Status** section shows:

- Any-to-Local:** Does not exist
- Local-to-Local:** Does not exist
- Local-to-Atom:** Does not exist.

The **Runtime Schema Validation** section includes:

- Request Message:**
- Non-Repudiation:**

The **Routing Actions Upon Save** section includes:

- Generate Any-to-Local:**
- Generate Local-to-Local:**

The **Message Information** section shows:

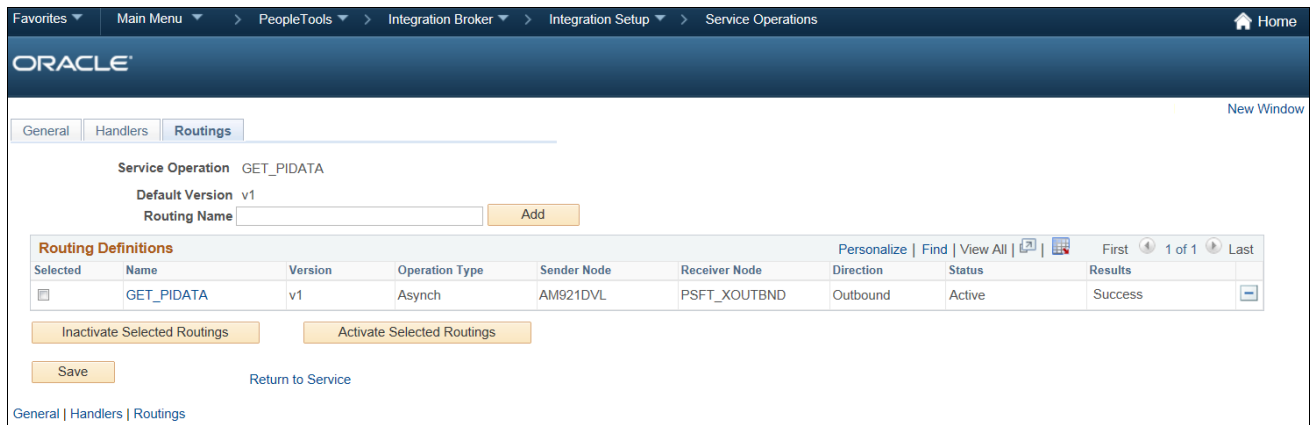
- Type:** Request
- Message.Version:** GET_PIDATA.VERSION_1 (with a search icon and a [View Message](#) link)
- *Queue Name:** ASSET_MANAGEMENT (with a search icon and [View Queue](#) and [Add New Queue](#) links)

At the bottom of the form, there are three buttons: **Save** (orange), **Return to Service** (blue), and **Add Version** (blue). The breadcrumb trail at the very bottom reads: General | Handlers | Routings.

Service Operations - General page

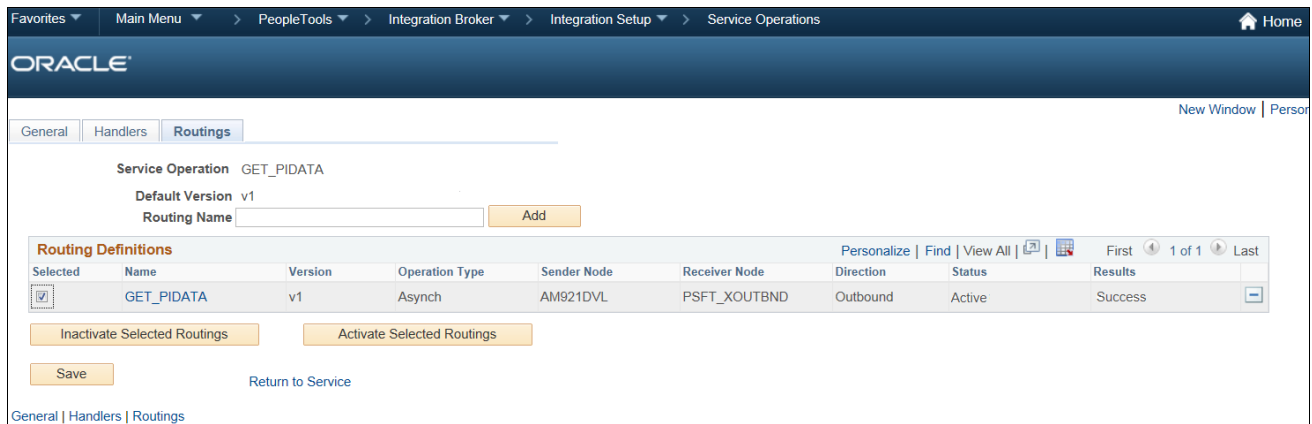
3. On the General page, select the Active check box, and then click Save.
4. On the Save Message dialog box, click OK.

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



Service Operations - Routings page

6. On the Routings page, select the check box for the routing GET_PIDATA, as shown in the following example:



Service Operations - Routings page with Selected check box

7. Click the Activate Selected Routings button.
8. Select the General tab to access the General page.
9. Click Return to Search.

10. On the Service Operations search page, search for and select the service operation *GET_PIDATA_ACK*.

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

The screenshot displays the Oracle Service Operations - General page for the service operation *GET_PIDATA_ACK*. The breadcrumb trail at the top indicates the navigation path: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Service Operations. The Oracle logo is visible in the top left corner.

The page is divided into several sections:

- General:** Contains fields for Service Operation (*GET_PIDATA_ACK*), Operation Type (Asynchronous - One Way), *Operation Description (Get Physical Inv Data Response), Operation Comments (Get Physical Inventory Data Response from third party vendor), Owner ID (Asset Management), and Operation Alias.
- Service Operation Security:** Includes checkboxes for User/Password Required and *Req Verification (None).
- Default Service Operation Version:** Shows *Version (v1), Version Description (Get Physical Inv Data Response), and Version Comments (Get Physical Inventory Data Response from third party vendor). It also has checkboxes for Default and Active.
- Runtime Schema Validation:** Includes checkboxes for Request Message and Non-Repudiation.
- Routing Status:** A table showing routing status for Any-to-Local, Local-to-Local, and Local-to-Atom, all of which are "Does not exist".

Routing Status	Status
Any-to-Local	Does not exist
Local-to-Local	Does not exist
Local-to-Atom	Does not exist
- Routing Actions Upon Save:** Includes checkboxes for Generate Any-to-Local and Generate Local-to-Local.
- Message Information:** Shows Type (Request), Message.Version (GET_PIDATA_ACK.v1), and *Queue Name (ASSET_MANAGEMENT). It includes links for View Message, View Queue, and Add New Queue.

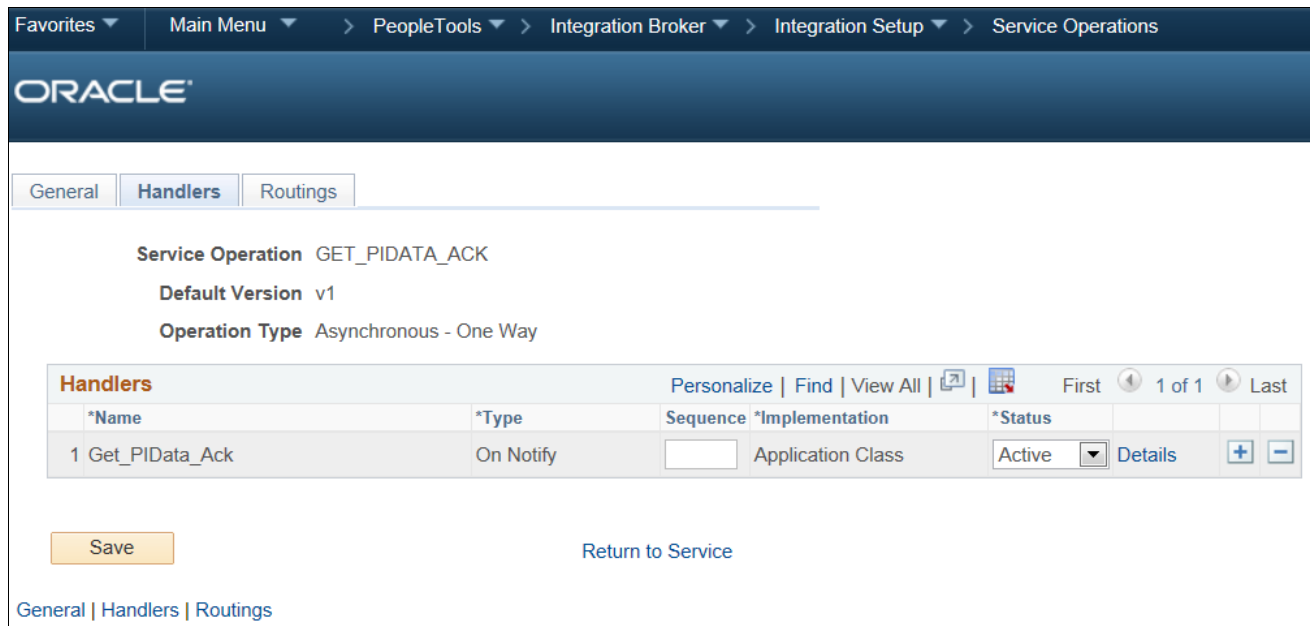
At the bottom of the page, there are buttons for Save, Return to Service, and Add Version. The breadcrumb trail at the bottom left reads: General | Handlers | Routings.

Service Operations - General page

11. On the General page, select the Active check box and then click Save.

12. On the Save Message dialog box, click OK.

13. Select the Handlers tab to access the Handlers page, as shown in the following example:

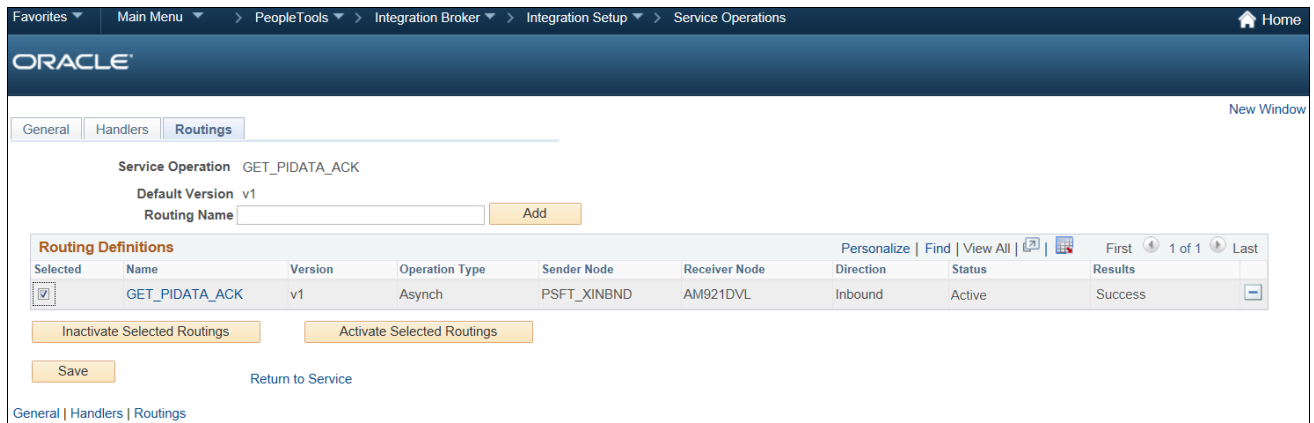


Service Operations - Handlers page

14. On the Handlers page, in the Status field, select Active from the drop-down list box.

15. Click Save.

16. Select the Routings tab to access the Routings page, as shown in the following example:



Service Operations - Routings page

17. On the Routings page, select the check box for the routing GET_PIDATA_ACK.
18. Click the Activate Selected Routings button.
19. Click Save.

Task 18-4: Running Message Channel

To run the message channel:

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

- On the Queues search page, search for and select the queue name ASSET_MANAGEMENT. The Queue Definitions page appears, as shown in the following example:

Queue Definitions

Queue Name: ASSET_MANAGEMENT

Description: Channel for Asset/IT Assets

Comments: [Text Area]

Archive Unordered

Queue Status: Run

Owner ID: Asset Management

Operations Assigned to Queue

Service Operations	Version
ADD_ASSET_PUB	VERSION_1
ADD_EMP_PUB	VERSION_1
ADD_PROP_PUB	VERSION_1
GET_DISCOVERYDATA	VERSION_1
GET_DISCOVERYDATA_ACK	VERSION_1
GET_DISCOVERYDATA_STATUS_ACK	VERSION_1
GET_PIDATA	v1
GET_PIDATA_ACK	v1
IT_SYNC_ASSET_UPDATE	v1
LST_DELETEDPROPS_REQ	VERSION_1

Define Partitioning Fields

Include	Field	Alias Name
<input type="checkbox"/>	OPERATIONNAME	[Text Box]
<input type="checkbox"/>	PUBLISHER	[Text Box]
<input type="checkbox"/>	PUBPROC	[Text Box]

Buttons: Save, Add Field, Return to Search, Notify, Add, Update/Display

Queue Definitions page

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

Task 18-5: Activating the Domain for Asynchronous Messaging

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

To enable message handler and dispatcher:

- Execute the *psadmin* command.
- Ensure that your domain has publish/subscribe servers configured in psadmin.

3. Set Pub/Sub servers to *Yes* as shown in the following example of the PSADMIN Quick Configure menu:

```

-----
Quick-configure menu -- domain: TEST
-----
          Features                      Settings
          =====                      =====
1> Pub/Sub Servers   : Yes   17> DBNAME       : [TEST ]
2> Quick Server     : No    18> DBTYPE       : [ORACLE]
3> Query Servers    : No    19> UserId      : [QEDMO ]
4> Jolt              : Yes   20> UserPswd    : [ ]
5> Jolt Relay       : No    21> DomainID    : [TESTSERU ]
6> WSL              : No    22> AddToPATH   : [C:\oracle\product\11.2.0\client_
1\bin]
7> PC Debugger      : Yes   23> ConnectID   : [people ]
8> Event Notification: Yes  24> ConnectPswd: [ ]
9> MCF Servers      : No    25> DomainConnectPswd: [ ]
10> Perf Collator   : No    26> WSL Port    : [7000 ]
11> Analytic Servers : Yes  27> JSL Port    : [9000 ]
12> Domains Gateway : No    28> JRAD Port   : [9100 ]
13> Push Notifications: No

          Actions
          =====
14> Load config as shown
15> Custom configuration
16> Edit environment settings
h> Help for this menu
q> Return to previous menu

```

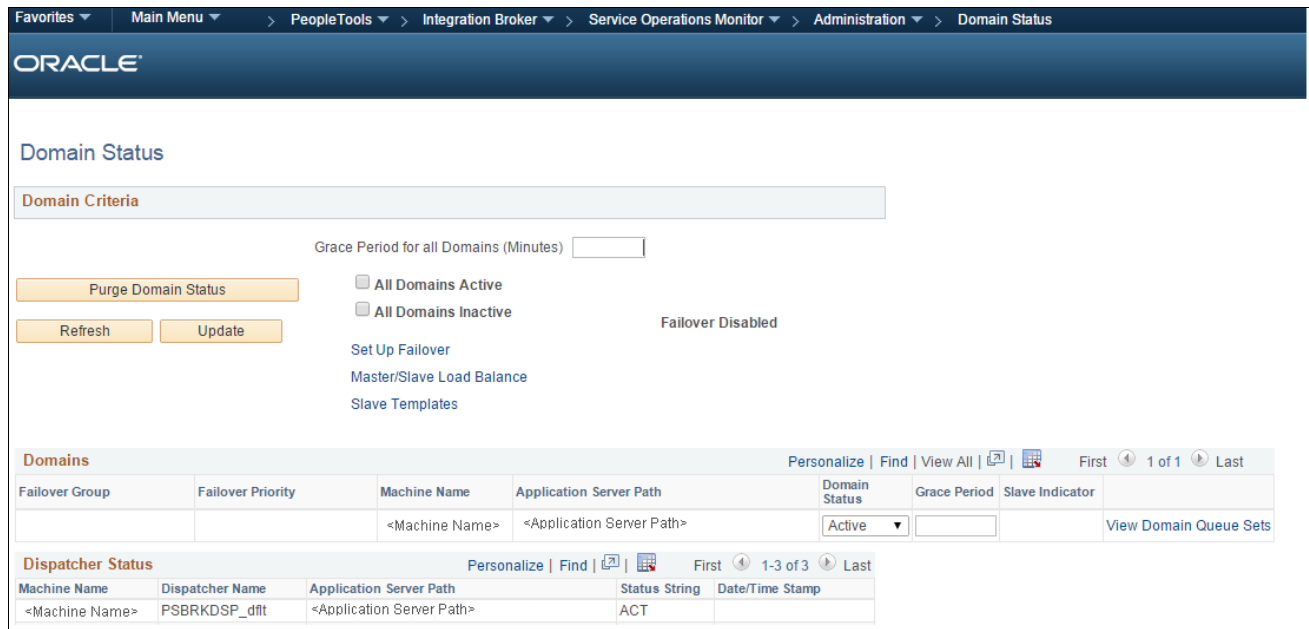
PSADMIN Quick-configure menu

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

To activate the domain:

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

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



Domain Status page

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

This completes the set up for PeopleSoft Asset Management Physical Inventory Web Services.

See the product documentation for PeopleSoft FSCM: Asset Management, "Performing Asset Physical Inventory," for more information about the PeopleSoft Asset Management Physical Inventory cycle where you can utilize service operations.

Chapter 19

Integrating PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems

This chapter discusses:

- Understanding the Integration of PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems
- Reviewing Configuration Values for IT Asset Management
- Configuring the Local Gateway
- Configuring the Inbound Nodes
- Activating Service Operations
- Managing Queue Status
- Activating the Domain for Asynchronous Messaging

Understanding the Integration of PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems

PeopleSoft 9.2 IT Asset Management integrates with additional component (third-party) Network Inventory Discovery Systems to provide the following functionality:

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

Reviewing Configuration Values for IT Asset Management

Use these values when integrating PeopleSoft 9.2 IT Asset Management with additional component (third-party) Network Discovery Systems.

The following table lists the HTTPTARGET Connector Properties:

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

The following table lists the routing definitions for the PSFT_EP node that Oracle delivers:

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

Task 19-1: Configuring the Local Gateway

To configure the local gateway:

1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click Search. The Gateways page for the Local Gateway appears by default.
3. On the Local Gateways page, in the URL field, enter the following URL:
http://<WEBSRV:PORT>/PSIGW/PeopleSoftListeningConnector
4. Click the Load Gateway Connectors button.

5. Click Save.

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

Gateways

Gateway ID LOCAL

Local Gateway Load Balancer

URL

Gateway Setup Properties

*Connector ID	Description	*Connector Class Name	Properties	+	-
1	AS2TARGET	AS2TargetConnector	Properties	+	-
2	EXAMPLETARGETCONN	ExampleTargetConnector	Properties	+	-
3	FILEOUTPUT	SimpleFileTargetConnector	Properties	+	-
4	FTPTARGET	FTPTargetConnector	Properties	+	-
5	GETMAILTARGET	GetMailTargetConnector	Properties	+	-
6	HTTPTARGET	HttpTargetConnector	Properties	+	-
7	JMSTARGET	JMSTargetConnector	Properties	+	-
8	PSFT81TARGET	ApplicationMessagingTargetConnector	Properties	+	-
9	PSFTTARGET	PeopleSoftTargetConnector	Properties	+	-
10	RIDCTARGET	RIDCTargetConnector	Properties	+	-
11	SFTPTARGET	SFTPTargetConnector	Properties	+	-
12	SMTPTARGET	SMTPTargetConnector	Properties	+	-

Gateways page

Task 19-2: Configuring the Inbound Nodes

To configure the inbound nodes:

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

- On the Node Definitions page, in the Default User ID field, enter the value for the user that submits the PROCESS_DISCOVERYDATA Service Operation into ITAM for the PSFT_XINBND node, as shown in the following example:

The screenshot shows the Oracle Node Definitions page for the node PSFT_XINBND. The page is titled 'Node Definitions' and includes a search bar at the top right. The main content area contains the following fields and options:

- Node Name:** PSFT_XINBND
- *Description:** External Inbound node
- *Node Type:** External (dropdown menu)
- *Authentication Option:** None (dropdown menu)
- *Default User ID:** VP1
- WSIL URL:** (empty text field)
- Hub Node:** (empty text field with search icon)
- Master Node:** (empty text field with search icon)
- Company ID:** (empty text field)
- IB Throttle Threshold:** (empty text field)
- Image Name:** (empty text field with search icon)
- Codeset Group Name:** (empty text field with search icon)
- External User ID:** (empty text field)
- External Password:** (empty text field)
- External Version:** (empty text field)

On the right side, there are three buttons: 'Copy Node', 'Rename Node', and 'Delete Node'. Below the fields, there are two tabs: 'Contact/Notes' and 'Properties'. At the bottom left, there is a 'Save' button and a 'Return to Search' button. The Oracle logo is visible in the top left corner of the page.

Node Definitions page for PSFT_XINBND

- Click Save.
- Click Return to Search.
- On the Nodes search page, search for and select the node name *ANONYMOUS*.

7. On the Node Definitions page, in the Default User ID field, enter the value for the user that submits the PROCESS_DISCOVERYDATA Service Operation into ITAM for the ANONYMOUS node, as shown in the following example:

The screenshot shows the Oracle Node Definitions page for the ANONYMOUS node. The page is titled "Node Definitions" and includes a search bar and navigation tabs. The configuration fields are as follows:

- Node Name:** ANONYMOUS
- *Description:** Used internally by IB system.
- *Node Type:** External
- *Authentication Option:** None
- *Default User ID:** VP1
- WSIL URL:** (empty)
- Hub Node:** (empty)
- Master Node:** (empty)
- Company ID:** (empty)
- IB Throttle Threshold:** (empty)
- Image Name:** (empty)
- Codeset Group Name:** (empty)
- External User ID:** (empty)
- External Password:** (empty)
- External Version:** (empty)

Checkboxes on the right side of the form:

- Default Local Node
- Local Node
- Active Node
- Non-Repudiation
- Segment Aware

Buttons on the right side of the form:

- Copy Node
- Rename Node
- Delete Node

Buttons at the bottom of the form:

- Save
- Return to Search

Navigation tabs at the bottom of the page:

- Node Definitions
- Connectors
- Portal
- WS Security
- Routings

Node Definitions page for ANONYMOUS

8. Click Save.

Task 19-3: Activating Service Operations

To activate service operations:

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

PROCESS_DISCOVERYDATA.

- On the Service Operations - General page, verify that the Active check box is selected, as shown in the following example:

The screenshot displays the Oracle Service Operations configuration page for the service operation **PROCESS_DISCOVERYDATA**. The page is divided into several sections:

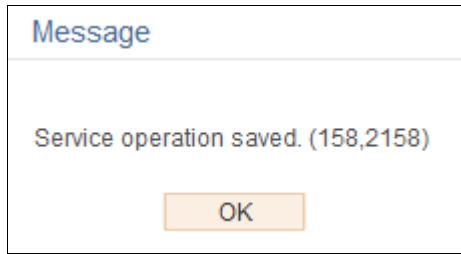
- General Information:**
 - Service Operation:** PROCESS_DISCOVERYDATA
 - Operation Type:** Asynchronous - One Way
 - *Operation Description:** ITAM Process Discovery Data
 - Operation Comments:** ITAM integration of Discovery Data.
 - Owner ID:** Asset Management
 - Operation Alias:** (Empty field)
- Default Service Operation Version:** (Highlighted section)
 - *Version:** v1
 - Version Description:** Version 1
 - Version Comments:** Version 1 of PROCESS_DISCOVERYDATA.
 - Default:** (Selected)
 - Active:** (Selected)
- Service Operation Security:**
 - User/Password Required
 - *Req Verification:** None
- Runtime Schema Validation:**
 - Request Message
 - Non-Repudiation
- Routing Status:**
 - Any-to-Local:** Does not exist
 - Local-to-Local:** Does not exist
 - Local-to-Atom:** Does not exist.
- Routing Actions Upon Save:**
 - Generate Any-to-Local
 - Generate Local-to-Local
- Message Information:**
 - Type:** Request
 - Message.Version:** PROCESS_DISCOVERYDATA.v1 (with [View Message](#) link)
 - *Queue Name:** ASSET_MANAGEMENT (with [View Queue](#) link and [Add New Queue](#) button)

At the bottom of the page, there are buttons for **Save**, **Return to Service**, and **Add Version**. The breadcrumb navigation at the top shows: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Service Operations.

Service Operations: General page

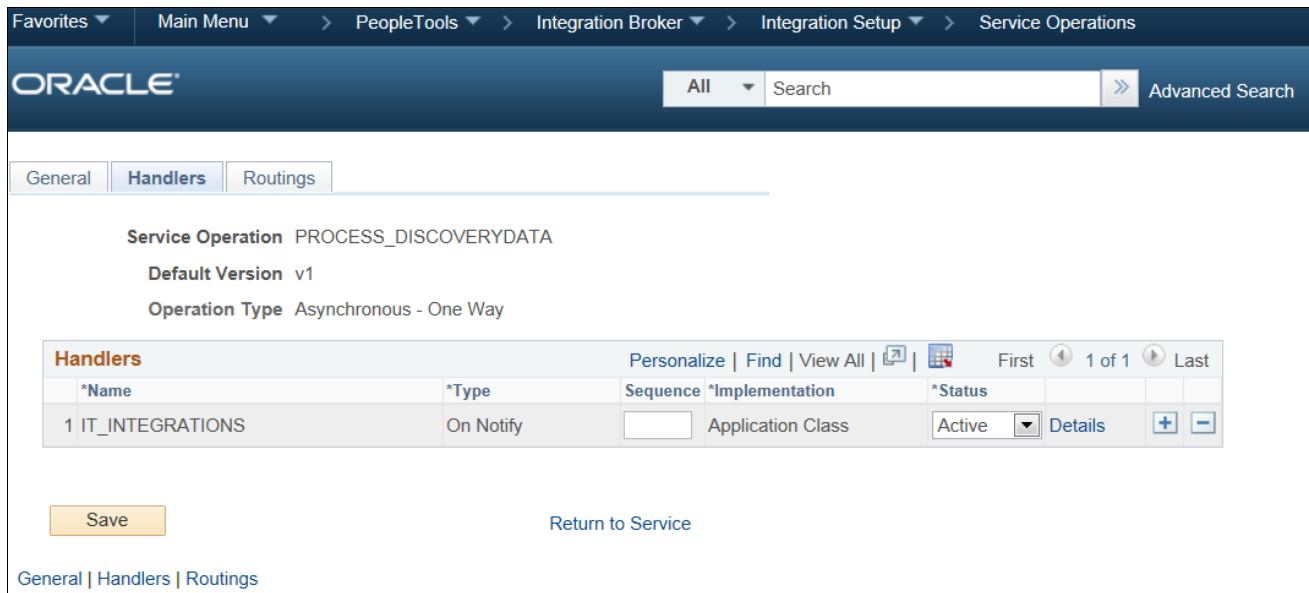
- Click Save.

- 5. The message "Service operation saved" displays, as shown in the following example:



Service Operation: Saved Message page

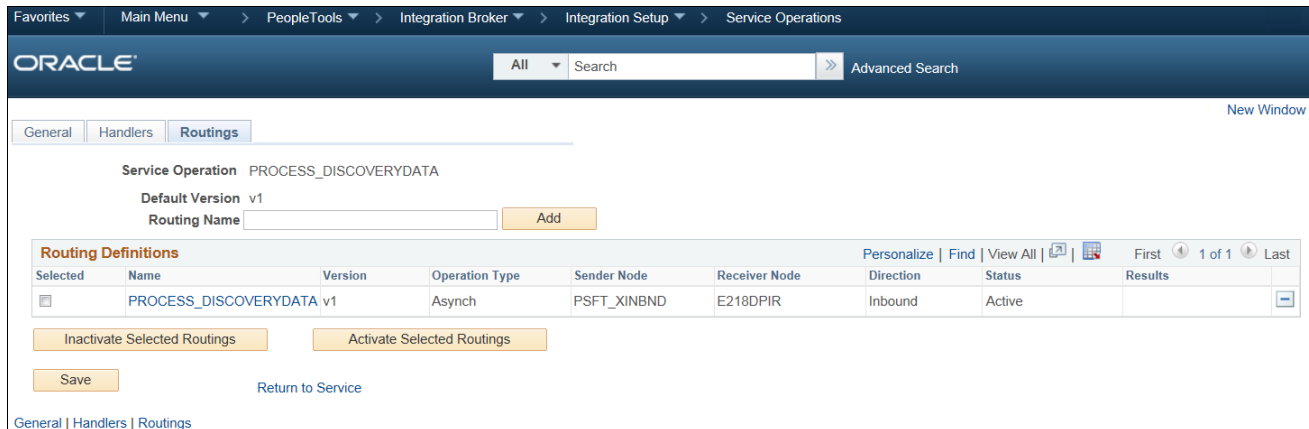
- 6. Click OK.
- 7. On the General page, select the Handlers tab to access the Handlers page, as shown in the following example:



Service Operations: Handlers page

- 8. On the Handlers page, in the Handlers group box, select *Active* from the Status drop-down list box.
- 9. Click Save.

10. On the Handlers page, select the Routings tab and access the Routings page, as shown in the following example:



Service Operations: Routings page

11. On the Routings page, select the check box for the routing.
12. Click the Activate Selected Routings button.
13. Click Save.

Task 19-4: Managing Queue Status

To run the message channel:

1. Select PeopleTools, Integration Broker, Integration Setup, Queues.
2. On the Queues search page, search for and select the queue name *ASSET_MANAGEMENT*.
3. On the Queue Definitions page, in the Queue Status field, verify that Run is selected.

- If the Queue Status is paused, select *Run* from the Queue Status drop-down list box, as shown in the following example:

Queue Definitions

Queue Name: ASSET_MANAGEMENT
 Description: Channel for Asset/IT Assets
 Comments:

Archive Unordered
 Queue Status: Run
 Owner ID: Asset Management

Operations Assigned to Queue

Service Operations	Version
ADD_ASSET_PUB	VERSION_1
ADD_EMP_PUB	VERSION_1
ADD_PROP_PUB	VERSION_1
GET_DISCOVERYDATA	VERSION_1
GET_DISCOVERYDATA_ACK	VERSION_1
GET_DISCOVERYDATA_STATUS_ACK	VERSION_1
GET_PIDATA	v1
GET_PIDATA_ACK	v1
IT_SYNC_ASSET_UPDATE	v1
LST_DELETEDPROPS_REQ	VERSION_1

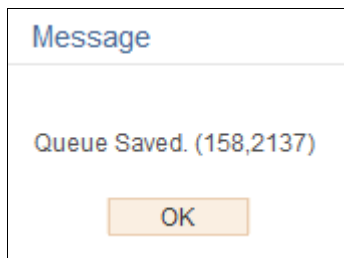
Define Partitioning Fields

Include	Field	Alias Name
<input type="checkbox"/>	OPERATIONNAME	<input type="text"/>
<input type="checkbox"/>	PUBLISHER	<input type="text"/>
<input type="checkbox"/>	PUBPROC	<input type="text"/>

Buttons: Save, Add Field, Return to Search, Notify, Add, Update/Display

Queue Definition

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



Queue Saved Message

- Click OK.

Task 19-5: Activating the Domain for Asynchronous Messaging

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

Set Pub/Sub servers to *Yes* as shown in the following example:

```

-----
Quick-configure menu -- domain: TEST
-----
          Features                               Settings
          =====                               =====
1) Pub/Sub Servers      : Yes   17) DBNAME       : [TEST ]
2) Quick Server        : No    18) DBTYPE       : [ORACLE]
3) Query Servers       : No    19) UserId       : [QEDMO ]
4) Jolt                : Yes   20) UserPswd    : [ ]
5) Jolt Relay          : No    21) DomainID    : [TESTSERV ]
6) WSL                 : No    22) AddToPATH   : [C:\oracle\product\11.2.0\client
1\bin]
7) PC Debugger         : Yes   23) ConnectID   : [people ]
8) Event Notification  : Yes   24) ConnectPswd : [ ]
9) MCF Servers         : No    25) DomainConnectPswd : [ ]
10) Perf Collator     : No    26) WSL Port    : [7000 ]
11) Analytic Servers   : Yes   27) JSL Port    : [9000 ]
12) Domains Gateway    : No    28) JRAD Port   : [9100 ]
13) Push Notifications : No

          Actions
          =====
14) Load config as shown
15) Custom configuration
16) Edit environment settings
h) Help for this menu
q) Return to previous menu
    
```

PSADMIN page

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

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

To activate the domain:

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

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

Domain Status

Domain Criteria

Grace Period for all Domains (Minutes)

All Domains Active
 All Domains Inactive Failover Disabled

[Set Up Failover](#)
[Master/Slave Load Balance](#)
[Slave Templates](#)

Domains Personalize | Find | View All | First 1 of 1 Last

Failover Group	Failover Priority	Machine Name	Application Server Path	Domain Status	Grace Period	Slave Indicator
		<Machine Name>	<Application Server Path>	Active	<input type="text"/>	<input type="text"/>

[View Domain Queue Sets](#)

Dispatcher Status Personalize | Find | First 1-3 of 3 Last

Machine Name	Dispatcher Name	Application Server Path	Status String	Date/Time Stamp
<Machine Name>	PSBRKDSP_dflt	<Application Server Path>	ACT	

Domain Status page

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

This completes the setup for PeopleSoft Asset Management with Network Inventory Discovery Systems.

See the product documentation for PeopleSoft FSCM: Asset Management, "Working with the IT Asset Inventory Tool," for more information about this integration.

Chapter 20

Installing PeopleSoft 9.2 Mobile Inventory Management

This chapter discusses:

- Understanding the PeopleSoft 9.2 Mobile Inventory Management Product
- Prerequisites
- Accessing Installation Files
- Installing the Oracle WebLogic Server for Mobile
- Installing the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management
- Applying the PeopleSoft Mobile Inventory Management Authentication Provider
- Setting Up the PeopleSoft Database for PeopleSoft Mobile Inventory Management
- Deploying the Mobile Application to Oracle Application Developer for an Oracle WebLogic Server
- Undeploying the Mobile Application

Understanding the PeopleSoft 9.2 Mobile Inventory Management Product

The PeopleSoft Mobile Inventory Management product provides tools that integrate handheld bar code data collection devices with the PeopleSoft Supply Chain Management system, improving efficiency and cost savings. Oracle Application Developer Framework uses the PeopleSoft Integration Broker and PeopleSoft Component Interfaces (CIs) to enable this process. The Oracle Application Developer Framework software is part of Oracle Fusion Middleware.

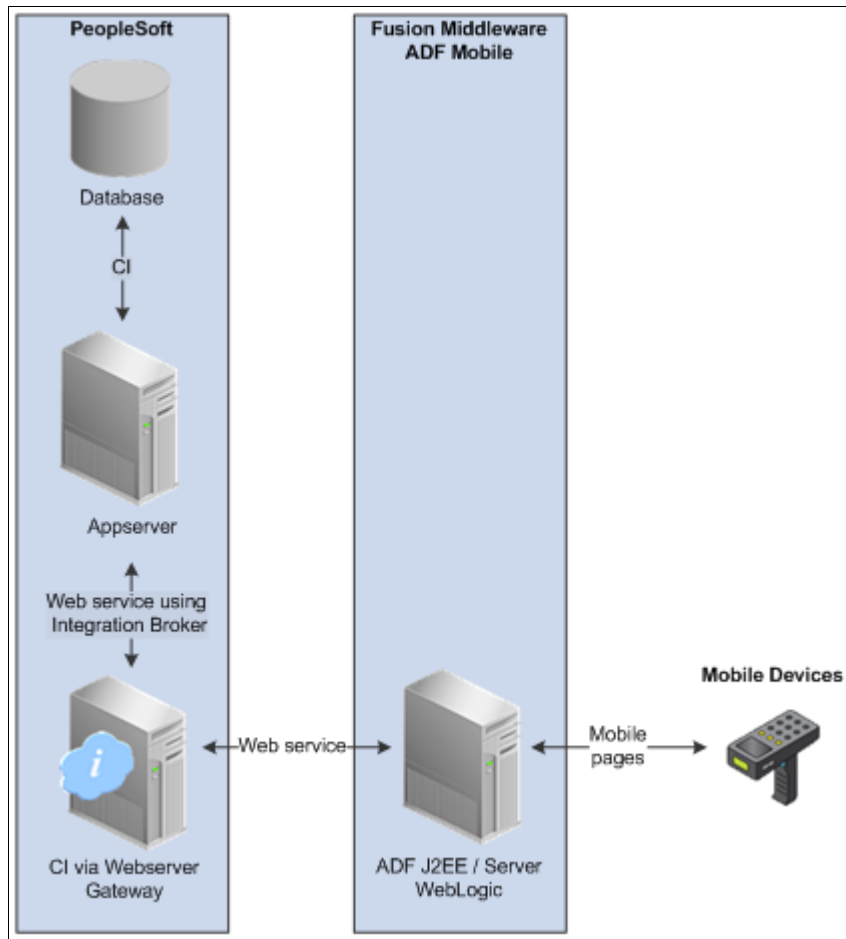
PeopleSoft CIs are PeopleTools components that enable exposure of a PeopleSoft component for synchronous access from another application, and they act as a web service in the PeopleTools Integration Broker. The system then publishes web services through the PeopleSoft Integration Broker to pass transaction data between PeopleSoft applications and additional component (third-party) applications.

For more information about setting up PeopleSoft application servers and web services, refer to the topic "Setting Up the PeopleSoft Database for PeopleSoft Mobile Inventory Management" later in this chapter as well as the following product documentation:

See *PeopleTools: System and Server Administration*.

See *PeopleSoft FSCM: Mobile Inventory Management*.

The following diagram illustrates the interface between PeopleSoft and mobile devices:



Overview of the interface between PeopleSoft and mobile devices

Prerequisites

The following requirements must be met before you install and run the PeopleSoft 9.2 Mobile Inventory Management product:

- PeopleSoft PeopleTools release
PeopleSoft PeopleTools 8.54.08 or higher is the minimum requirement to run PeopleSoft Mobile Inventory Management 9.2 with PeopleSoft Financials/Supply Chain Management 9.2.
See *PeopleSoft PeopleTools 8.54 Installation* for your database platform.
- Required at Install updates
Before proceeding with your installation, check My Oracle Support, Oracle Software Delivery Cloud (formerly Oracle E-Delivery), and Oracle Technology Network to ensure that you have the most current Required at Install updates and documentation for the products that you are installing.
See <http://support.oracle.com>.
See <http://edelivery.oracle.com>.
See <http://www.oracle.com/technetwork/index.html>.

- PeopleSoft PeopleTools patches and updates
Oracle recommends that you check the Oracle Software Delivery Cloud (formerly Oracle E-Delivery) and My Oracle Support for the latest PeopleSoft PeopleTools patches.
See <http://edelivery.oracle.com>.
See <http://support.oracle.com>.
- PeopleSoft Financials/Supply Chain Management 9.2 Application
To run PeopleSoft 9.2 Mobile Inventory Management, you must be using PeopleSoft Financials/SupplyChain Management 9.2.
- Java
Verify that you have the current 64-bit Java 7 if you are installing on a 64-bit server.
Go to www.java.com to download the current 64-bit Java 7 to use with the PeopleSoft Mobile Inventory Management installation.
- Oracle Application Developer 11gR1 (11.1.1.6 or 11.1.1.7)

Note. Oracle Application Developer 11gR2 is not yet supported.

Before you install PeopleSoft Mobile Inventory Management 9.2, you must complete the installation of Oracle Application Development Runtime 11.1.1.6 (or 11.1.1.7) on an Oracle WebLogic 10.3.6 Server instance. You can access the complete Oracle Application Developer 11.1.1.6 (or 11.1.1.7) Installation guide and the complete Oracle WebLogic 10.3.6 Installation guide from the Oracle Fusion Middleware Documentation Library at: http://download.oracle.com/docs/cd/E12839_01/index.htm.

See *Oracle Application Developer 11.1.1.6 Installation*.

See *Oracle WebLogic 10.3.6 Installation*.

- PeopleSoft Inventory 9.2
Before you install PeopleSoft Mobile Inventory Management 9.2, you must complete the installation and setup of PeopleSoft Inventory 9.2.
- PeopleSoft Purchasing 9.2
Before you install PeopleSoft Mobile Inventory Management 9.2, you must complete the installation and setup of PeopleSoft Purchasing 9.2 *only* if you plan to use receiving and delivery.
- Audit reports to clean your target databases
Oracle recommends that you run audit reports to ensure that your target databases are clean before you begin the installation process.

See Also

My Oracle Support, Certifications for PeopleSoft PeopleTools hardware and software requirements

PeopleSoft Financials/Supply Chain Management Hardware and Software Requirements, "Defining PeopleSoft Mobile Inventory Management Hardware and Software Requirements."

Oracle Application Development Framework 11.1.1.6 Hardware and Software Requirements.

Task 20-1: Accessing Installation Files

Use the Oracle Technology Network to access and download prerequisite application software and installation documentation as follows:

- To access the current Oracle WebLogic installation files, access the Oracle Technology Network at <http://www.oracle.com/technetwork/index.html>, select Downloads, Fusion Middleware 11g, and then, in the "For Development" section, select the current version.
- To access the Oracle Application Development Runtime Installer, access the Oracle Technology Network at <http://www.oracle.com/technetwork/index.html>, select Downloads, JDeveloper and ADF, and then, in the Oracle Application Development Runtime Installer section (on that page), click the Download link.

Check the Oracle Technology Network, Oracle Software Delivery Cloud (formerly Oracle E-Delivery), and My Oracle Support to ensure that you obtain the most current fixes required at install, bundles and documentation for the products that you are installing.

See <http://www.oracle.com/technetwork/index.html>.

See <http://edelivery.oracle.com>.

See <http://support.oracle.com>.

Task 20-2: Installing the Oracle WebLogic Server for Mobile

This section discusses:

- Understanding the Oracle WebLogic Server Installation for Mobile
- Installing the Oracle WebLogic Server for PeopleSoft Mobile Inventory Management
- Starting the Configuration Wizard to Define a New Domain

Understanding the Oracle WebLogic Server Installation for Mobile

Oracle Application Developer for Mobile installs on top of the Oracle WebLogic Server. Therefore, you must first install the Oracle WebLogic Server.

The Oracle WebLogic Server supports the Oracle Application Developer and the Application Developer Mobile browser that extends Oracle Application Developer to browsers running on mobile devices. The following task details a *general* installation of the Oracle WebLogic Server for PeopleSoft Mobile Inventory Management.

Task 20-2-1: Installing the Oracle WebLogic Server for PeopleSoft Mobile Inventory Management

To install the Oracle WebLogic Server for PeopleSoft Mobile Inventory Management:

Note. You can access the complete installation guide for the Oracle WebLogic Server 10.3.6 from the Oracle Fusion Middleware Documentation Library at:

<http://www.oracle.com/technetwork/middleware/ias/downloads/wls-main-097127.html>.

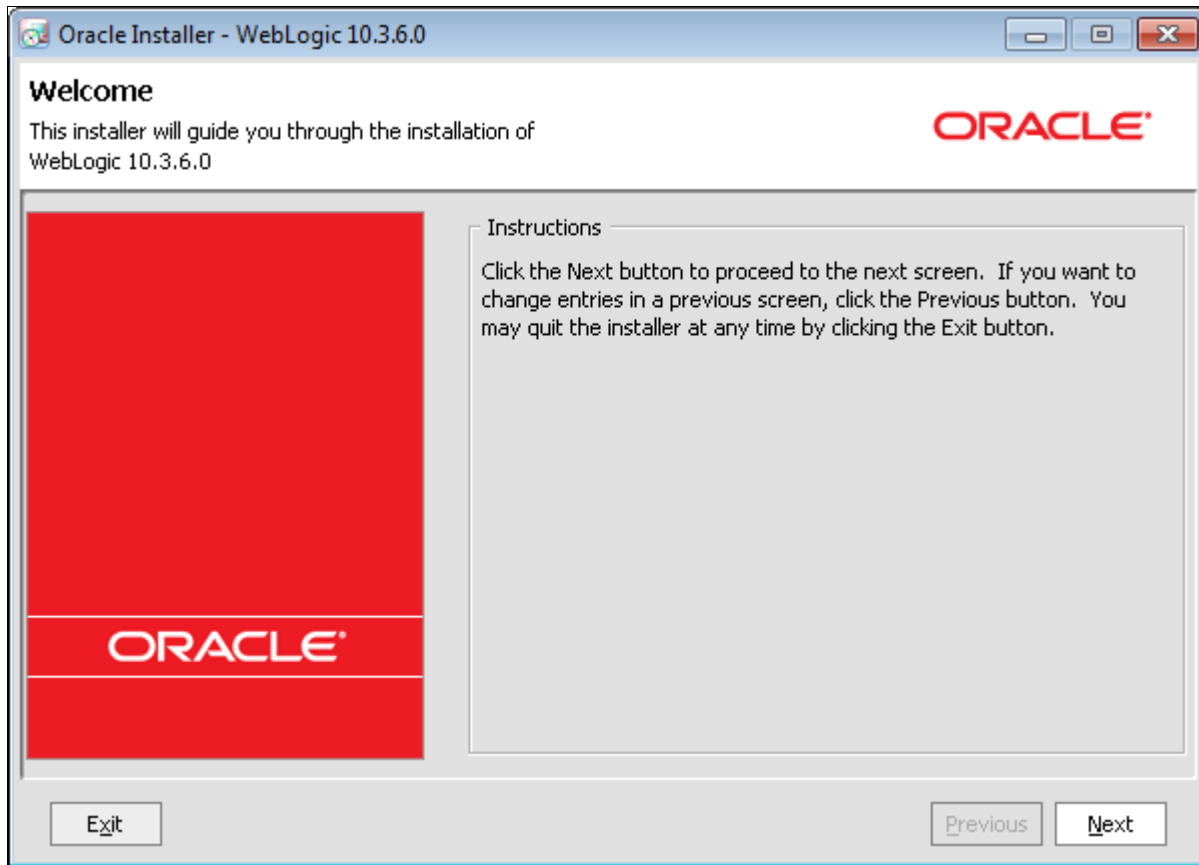
1. Download the Oracle WebLogic Server installation files from the Oracle Technology Network.

See the section Accessing Installation Files earlier in this chapter.

Note. The following installation instructions are based on the Microsoft Windows operating system. For UNIX installation instructions, refer the *Oracle® Fusion Middleware Installation* guide for the Oracle WebLogic Server. Graphical and console mode are supported for the Oracle WebLogic installation.

- 2. Double-click the executable file to start the Oracle Installer Wizard that launches the Oracle WebLogic Server 11g R1.

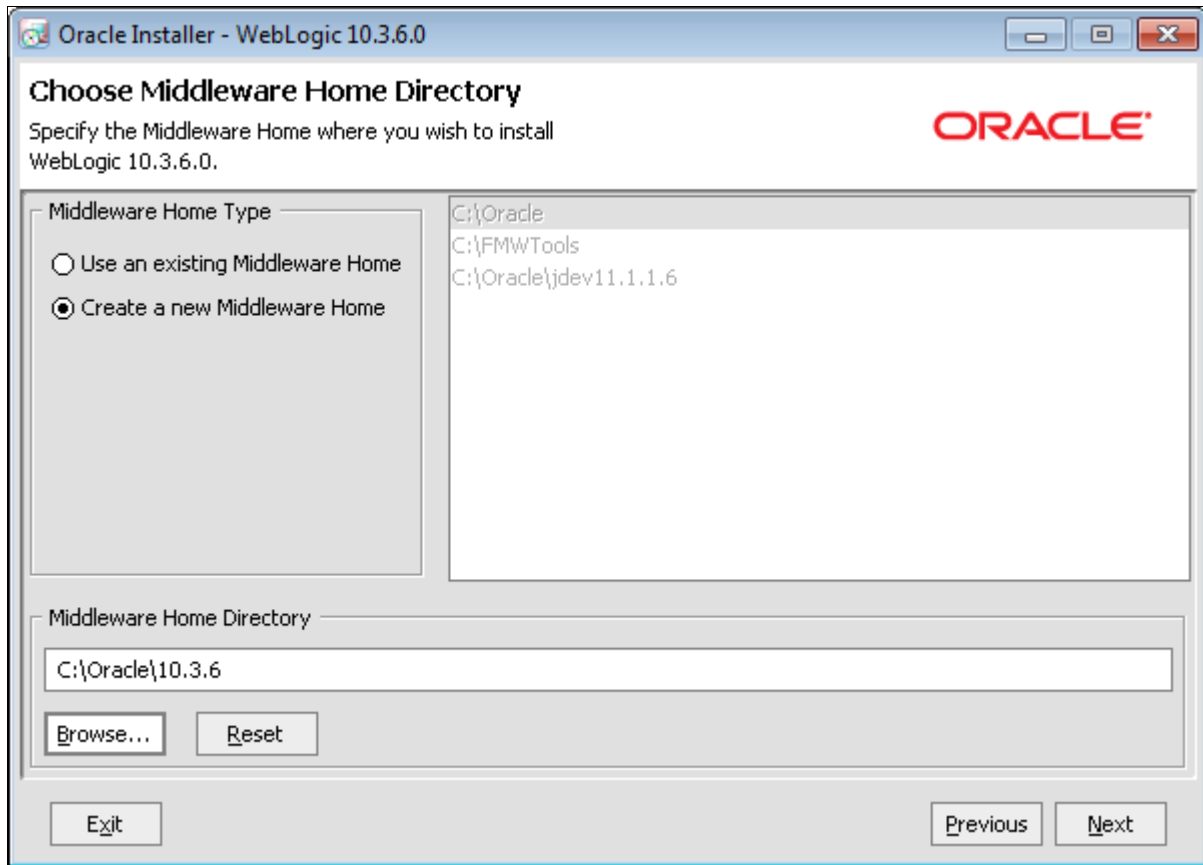
The Oracle Installer - WebLogic 10.3.6 - Welcome page appears, as shown in the following example:



Oracle Installer - WebLogic 10.3.6.0 - Welcome page

3. On the Welcome page, click Next.

The Oracle Installer - WebLogic 10.3.6.0 - Choose Middleware Home Directory page appears, as shown in the following example:

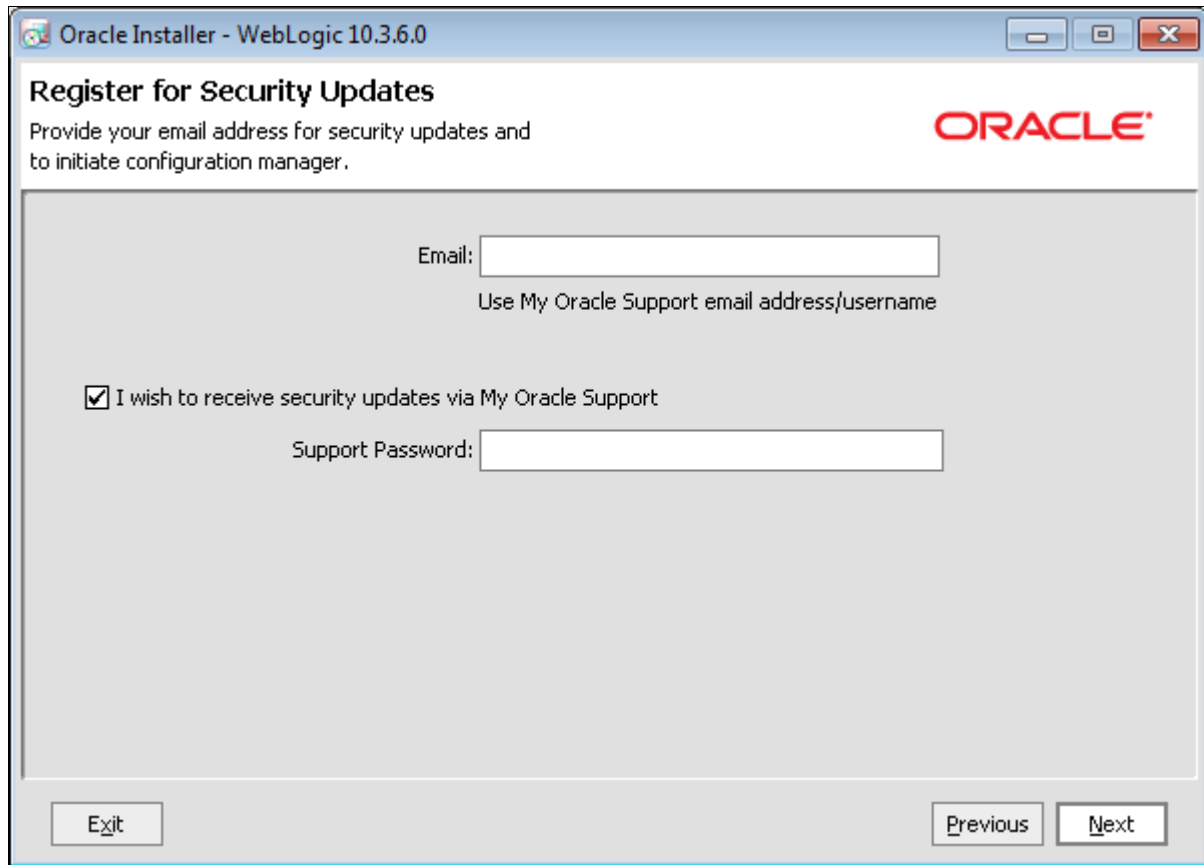


Oracle Installer - WebLogic 10.3.6.0 - Choose Middleware Home Directory page

4. On the Choose Middleware Home Directory page, do the following:
 - Select the option Create a new Middleware Home.
 - In the Middleware Home Directory field, enter a value.
For example: *C:\Oracle\10.3.6*.

5. Click Next.

The Oracle Installer - WebLogic 10.3.6.0 - Register for Security Updates page appears, as shown in the following example:

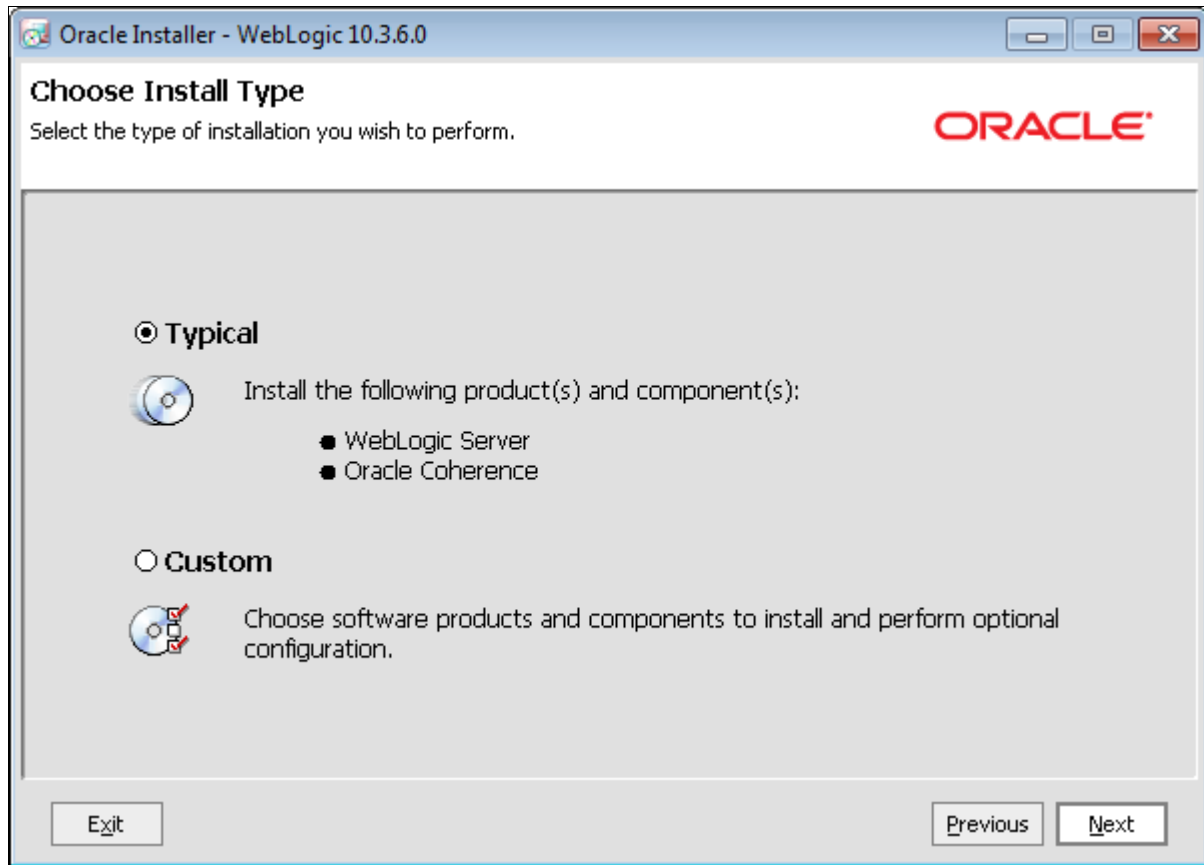


The screenshot shows a window titled "Oracle Installer - WebLogic 10.3.6.0". The main heading is "Register for Security Updates". Below the heading, it says "Provide your email address for security updates and to initiate configuration manager." The Oracle logo is in the top right corner. There is an "Email:" label followed by a text input field. Below the field is the text "Use My Oracle Support email address/username". There is a checked checkbox with the text "I wish to receive security updates via My Oracle Support". Below this is a "Support Password:" label followed by a text input field. At the bottom left is an "Exit" button. At the bottom right are "Previous" and "Next" buttons.

Oracle Installer - WebLogic 10.3.6.0 - Register for Security Updates page

6. The Register for Security Updates page requires no action. Click Next.

The Oracle Installer - WebLogic 10.3.6.0 - Choose Install Type page appears, as shown in the following example:



Oracle Installer - WebLogic 10.3.6.0 - Choose Install Type page

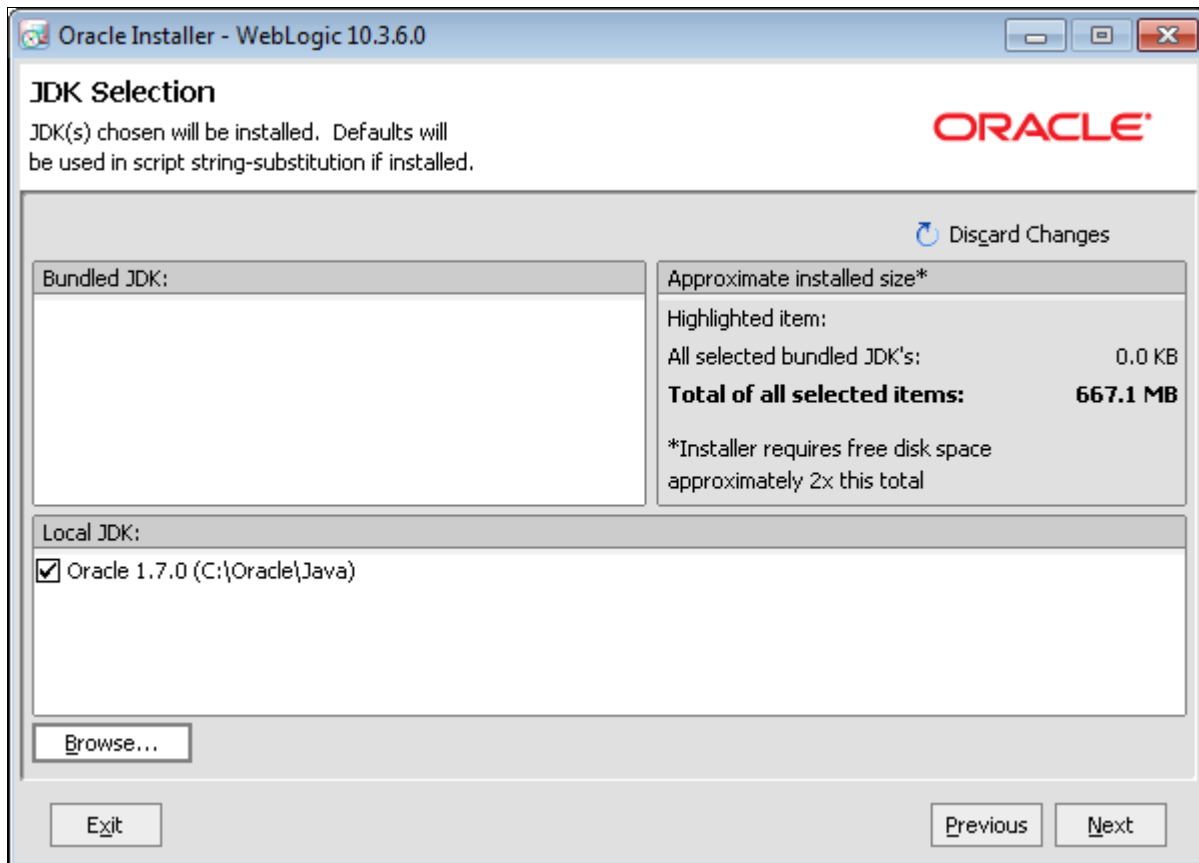
- 7. On the Choose Install Type page, select the Typical option and then click Next.

The JDK Selection page appears.

The mobile server for PeopleSoft FSCM 9.2 requires JDK7 to support the required Java version for PeopleSoft PeopleTools. Select JDK7 from the JDK Selection window.

JDK7 can be downloaded from the following URL:

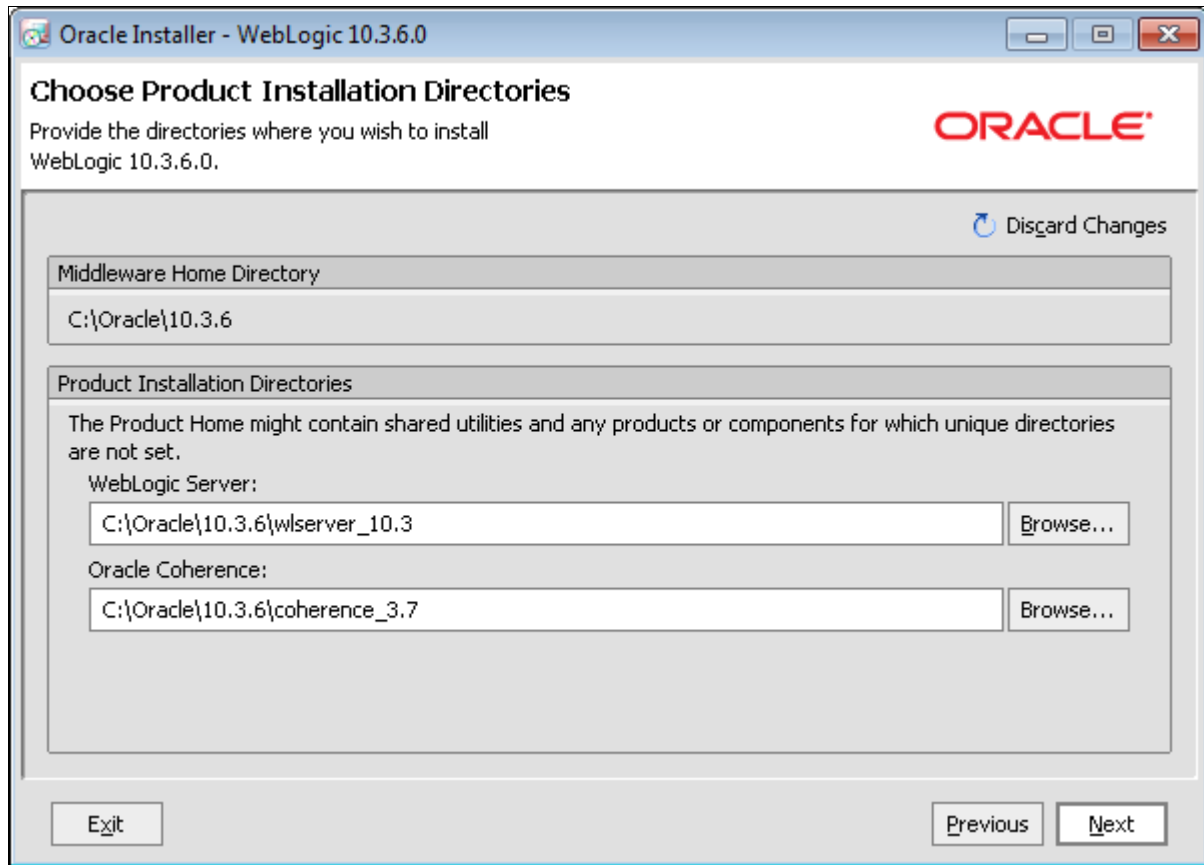
<http://www.oracle.com/technetwork/java/javase/downloads/java-se-jdk-7-download-432154.html>.



Oracle Installer - WebLogic 10.3.6.0 - JDK Selection page

8. After selecting JDK7 in the JDK Selection window, click Next.

The Oracle Installer - WebLogic 10.3.6.0 - Choose Product Installation Directories page appears, as shown in the following example:



Oracle Installer - WebLogic 10.3.6.0 - Choose Product Installation Directories page

9. On the Choose Product Installation Directories page, in the WebLogic Server field, browse to the directories where you want to install Oracle WebLogic and then click Next.

For a *general* installation, you can accept the default value for the Oracle Coherence field.

Note. For more information and details about Oracle Coherence and the Oracle WebLogic Server installation, access the complete *Oracle WebLogic Server 10.3.6 Installation* guide from the Oracle Fusion Middleware Documentation Library at: http://download.oracle.com/docs/cd/E12839_01/index.htm.

Task 20-2-2: Starting the Configuration Wizard to Define a New Domain

To start the Configuration Wizard to define a new domain:

1. After installation, you can launch QuickStart (Graphical Interface Only) as follows:
 - On Microsoft Windows systems, select Start, Programs, Oracle WebLogic, QuickStart.
 - On UNIX systems, do the following:
 - a. Log in to the target UNIX system.
 - b. Go to the /common/bin subdirectory of your installation.
For example: `cd /MW_HOME/wlserver_10.3/common/quickstart.`

- c. Enter the command `sh quickstart.sh`.
- d. For console mode on UNIX, use the Oracle WebLogic Scripting Tool (WLST) to create a Domain.
See *Oracle WebLogic Server Installation* guide from the Oracle Fusion Middleware Documentation Library at: http://download.oracle.com/docs/cd/E12839_01/index.htm.

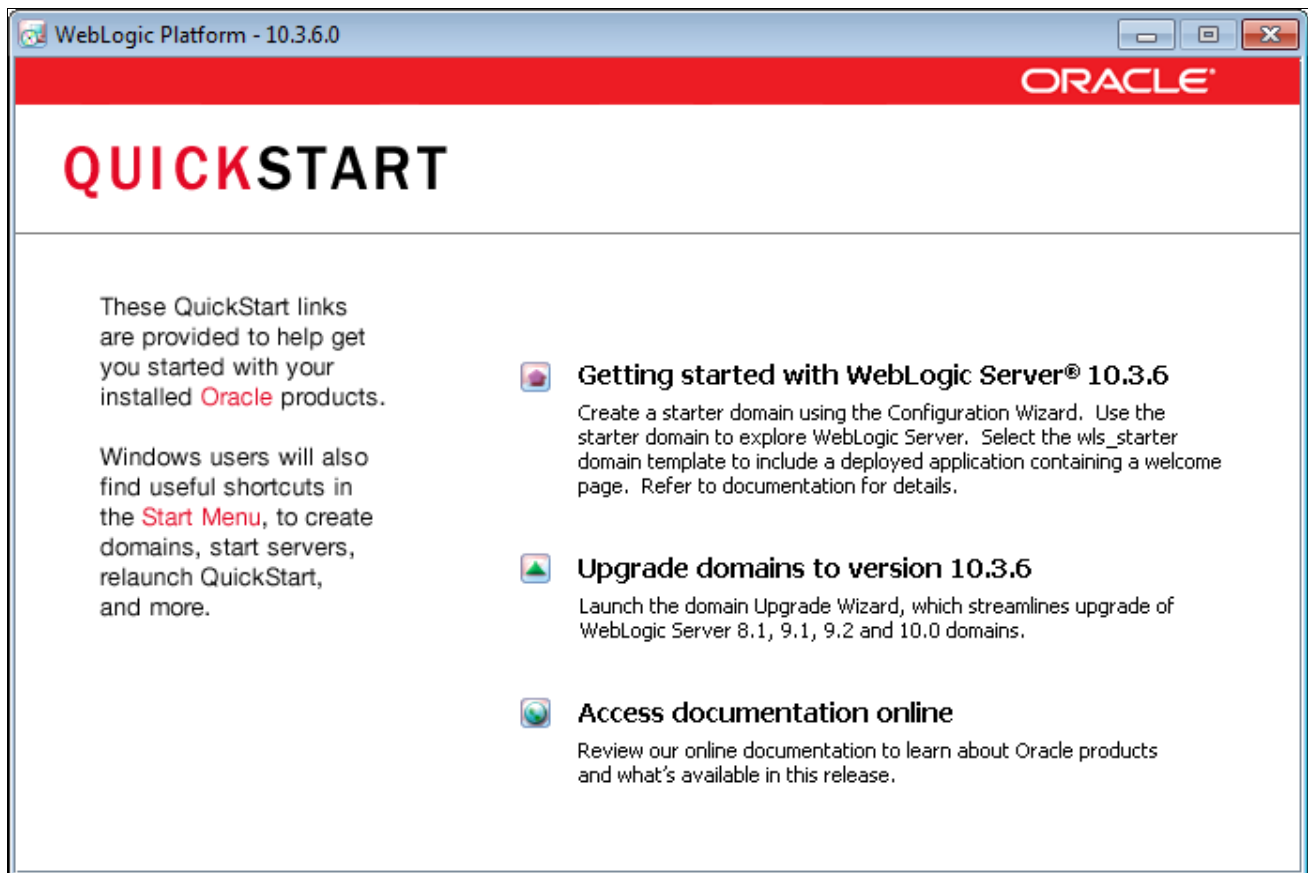
Note. This PeopleSoft Mobile Inventory Management installation chapter only covers the graphical interface.

2. Use the menu options from the Program Group to select Oracle WebLogic, QuickStart, as shown in the following example:



Accessing Quick Start from Start Menu under Oracle WebLogic

The WebLogic Platform - 10.3.6.0 - QuickStart page appears, as shown in the following example:

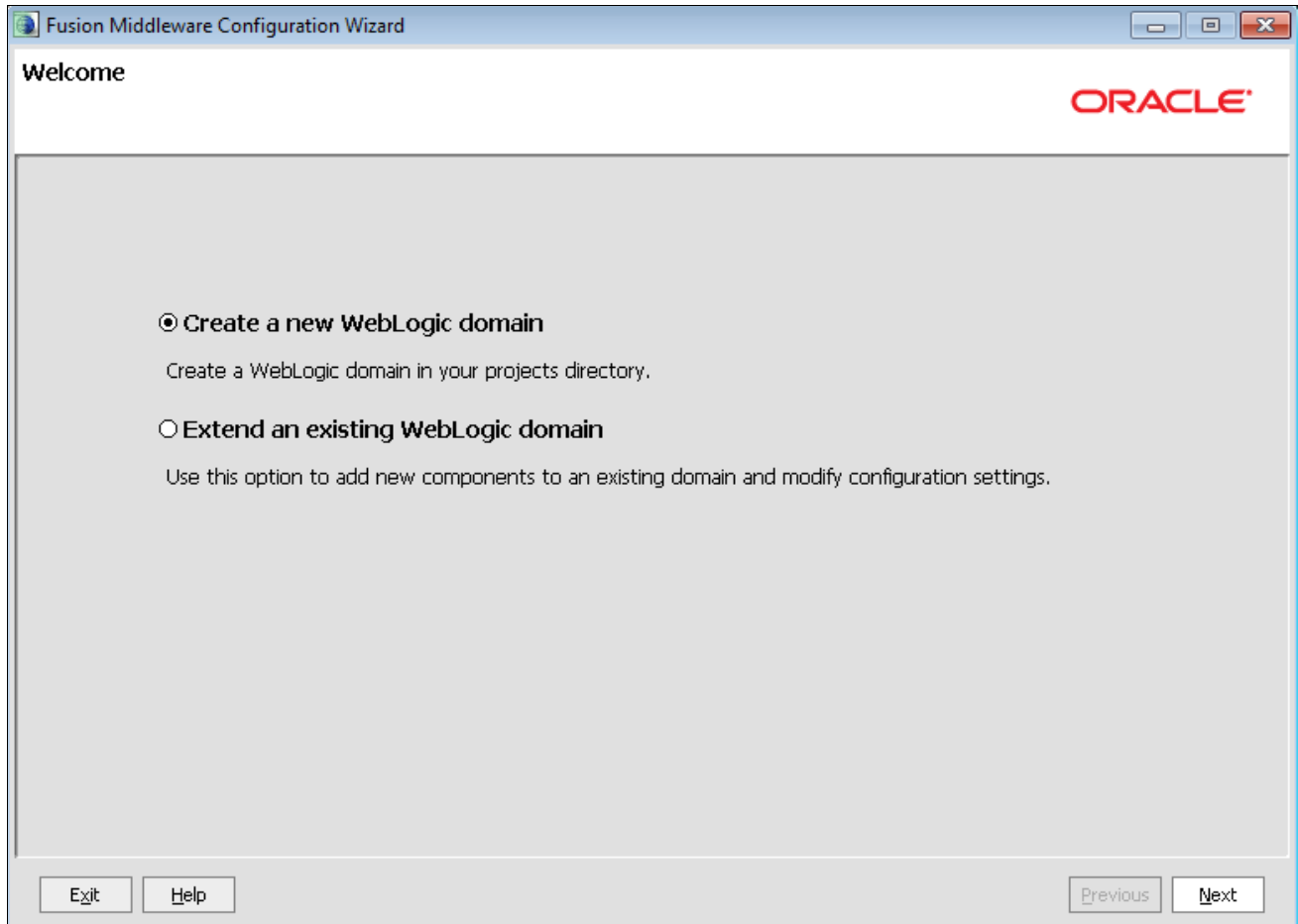


WebLogic Platform - 10.3.6.0 - Quick Start page

3. On the WebLogic QuickStart page, click the option Getting Started with WebLogic Server 10.3.6 to run the QuickStart Configuration Wizard to define a New Domain, *database_domain*.

Note. If you plan to run multiple domains, you can use *database* as part of the name when you define your domain name.

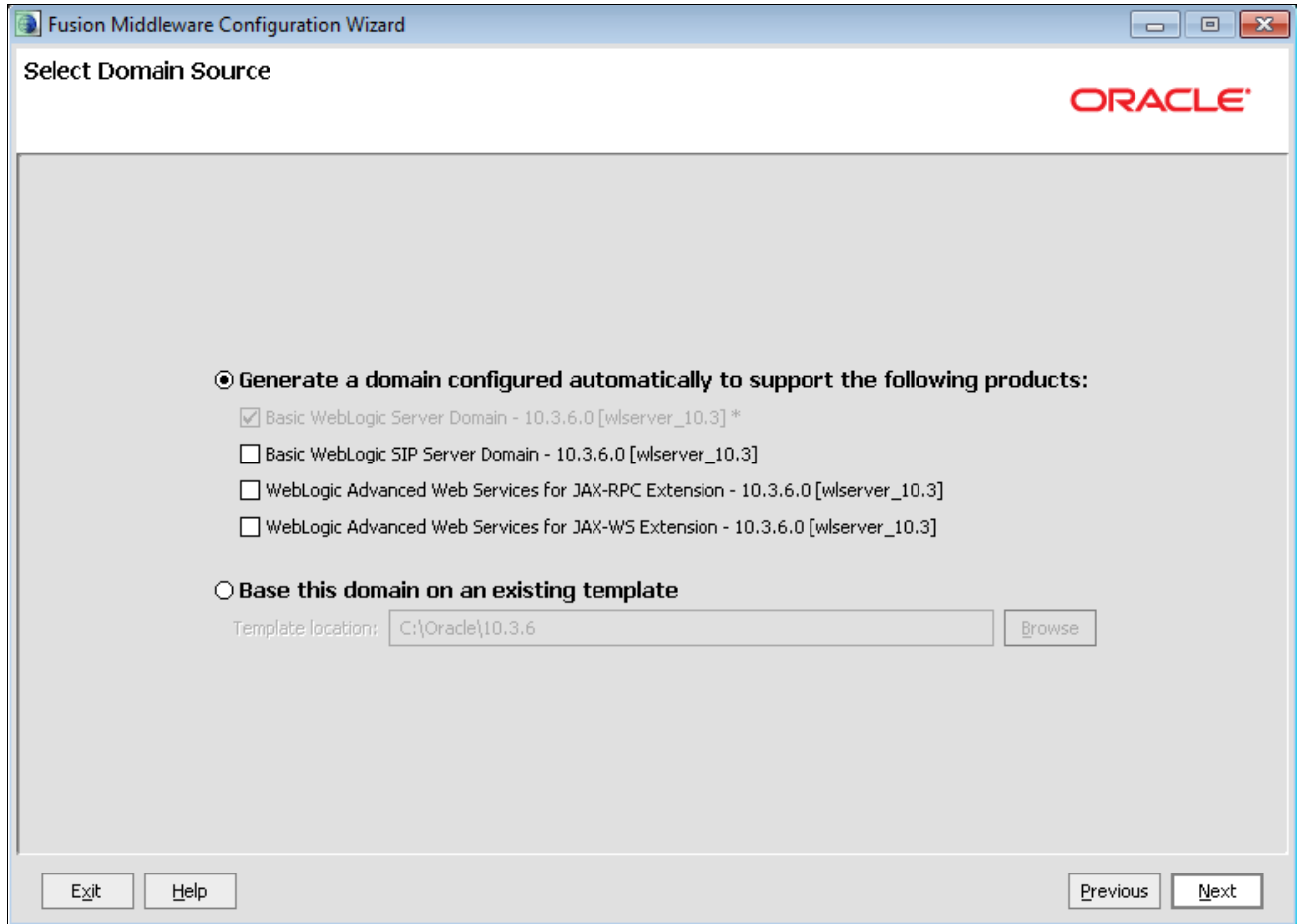
The Fusion Middleware Configuration Wizard - Welcome page appears, as shown in the following example:



Fusion Middleware Configuration Wizard: Welcome page

4. On the Welcome page, select the option Create a new WebLogic domain. Click Next.

The Fusion Middleware Configuration Wizard - Select Domain Source page appears, as shown in the following example:

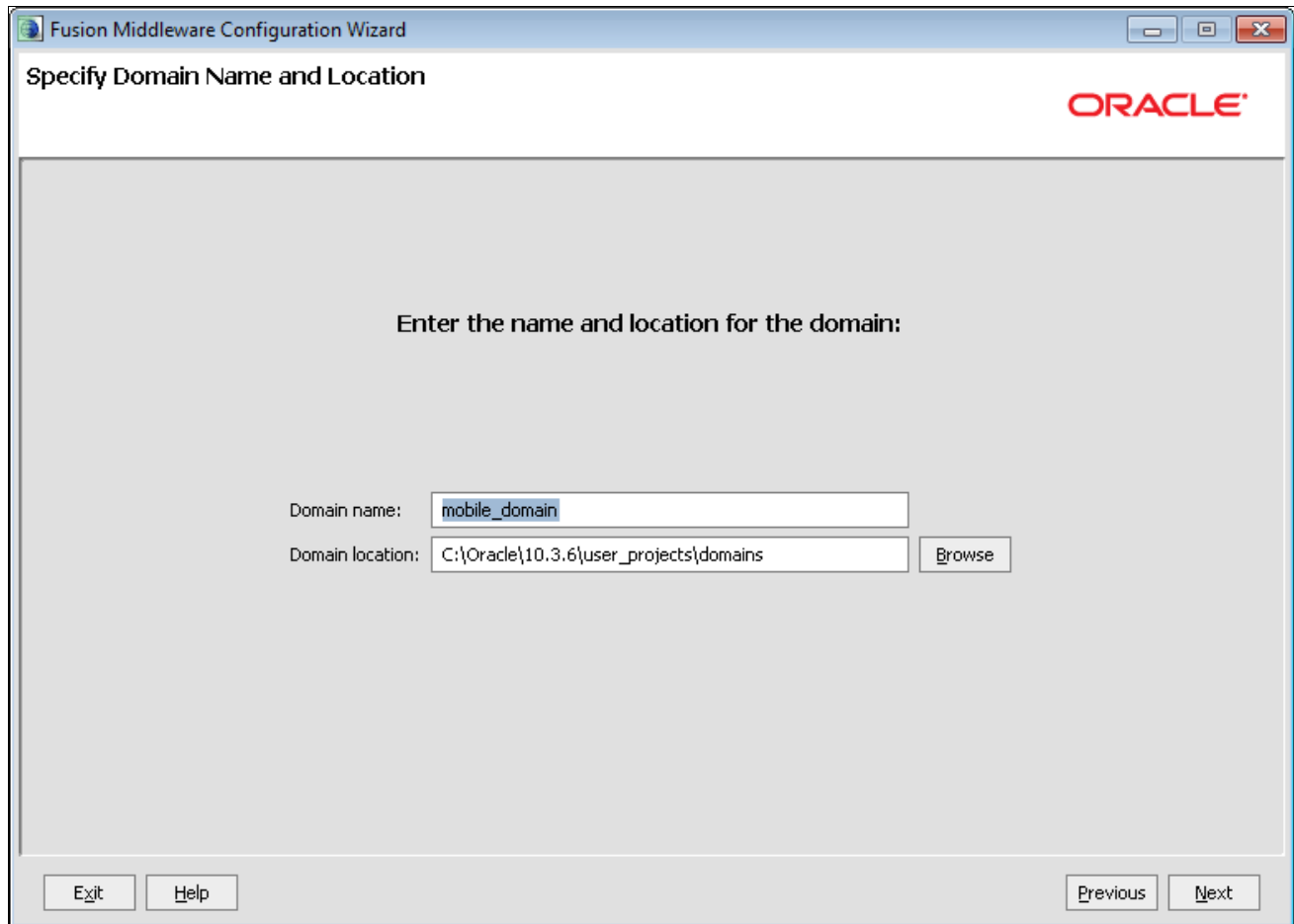


Fusion Middleware Configuration Wizard - Select Domain Source page

5. On the Select Domain Source page, do the following:
- Select the option Generate a domain configured automatically to support the following products.
 - Select the option Basic WebLogic SIP Server Domain - 10.3.6 [wlserver_10.3].

6. Click Next.

The Fusion Middleware Configuration Wizard - Specify Domain Name and Location page appears, as shown in the following example:



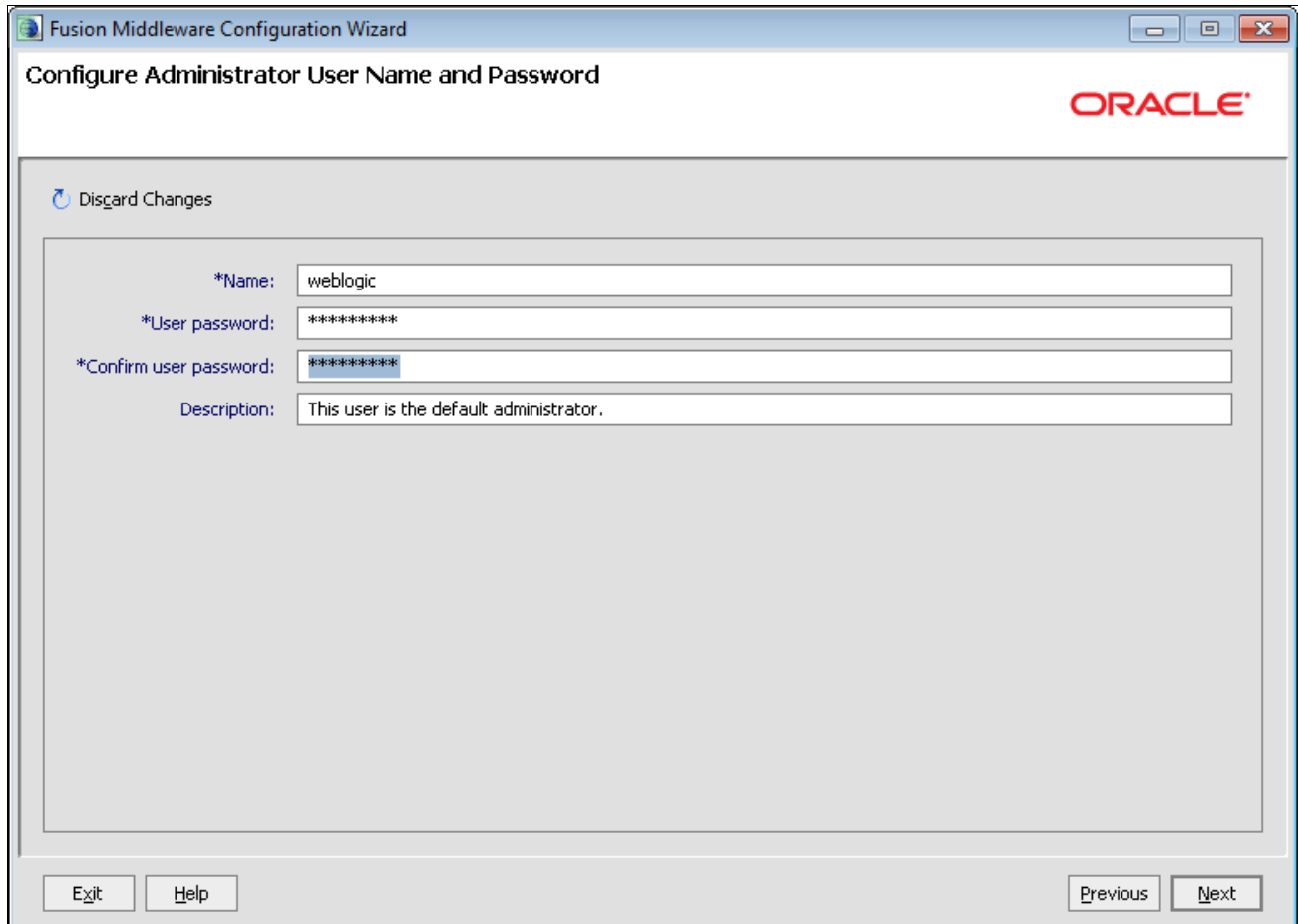
The screenshot shows a window titled "Fusion Middleware Configuration Wizard" with the subtitle "Specify Domain Name and Location". The Oracle logo is in the top right corner. The main area contains the instruction "Enter the name and location for the domain:". Below this, there are two input fields: "Domain name:" with the text "mobile_domain" and "Domain location:" with the text "C:\Oracle\10.3.6\user_projects\domains". A "Browse" button is next to the domain location field. At the bottom, there are buttons for "Exit", "Help", "Previous", and "Next".

Fusion Middleware Configuration Wizard - Specify Domain Name and Location page

7. On the Specify Domain Name and Location page, change the default domain name and location to specify *your* domain name and location. Click Next.

Important! Be sure to make note of your domain name and location. This information is required in later steps.

The Fusion Middleware Configuration Wizard - Configure Administrator User Name and Password page appears, as shown in the following example:

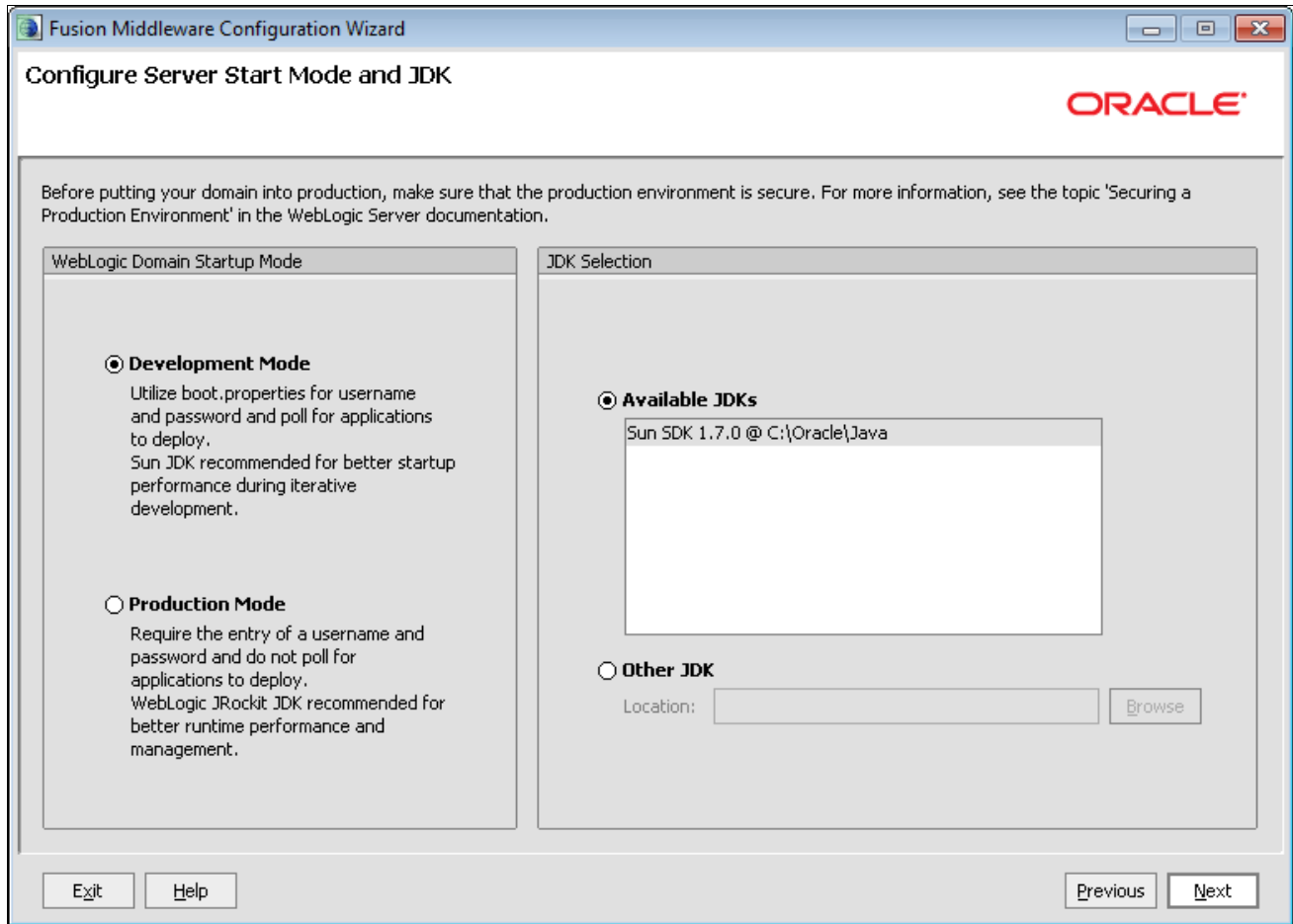


The screenshot shows a window titled "Fusion Middleware Configuration Wizard" with the subtitle "Configure Administrator User Name and Password". The Oracle logo is in the top right corner. A "Discard Changes" button is in the top left. The main area contains four input fields: "*Name:" with the value "weblogic", "*User password:" with "*****", "*Confirm user password:" with "*****", and "Description:" with the text "This user is the default administrator.". At the bottom are buttons for "Exit", "Help", "Previous", and "Next".

Fusion Middleware Configuration Wizard - Configure Administrator User Name and Password page

8. On the Configure Administrator User Name and Password page, enter your user name and password. Click Next.

The Fusion Middleware Configuration Wizard - Configure Server Start Mode and JDK page appears, as shown in the following example:

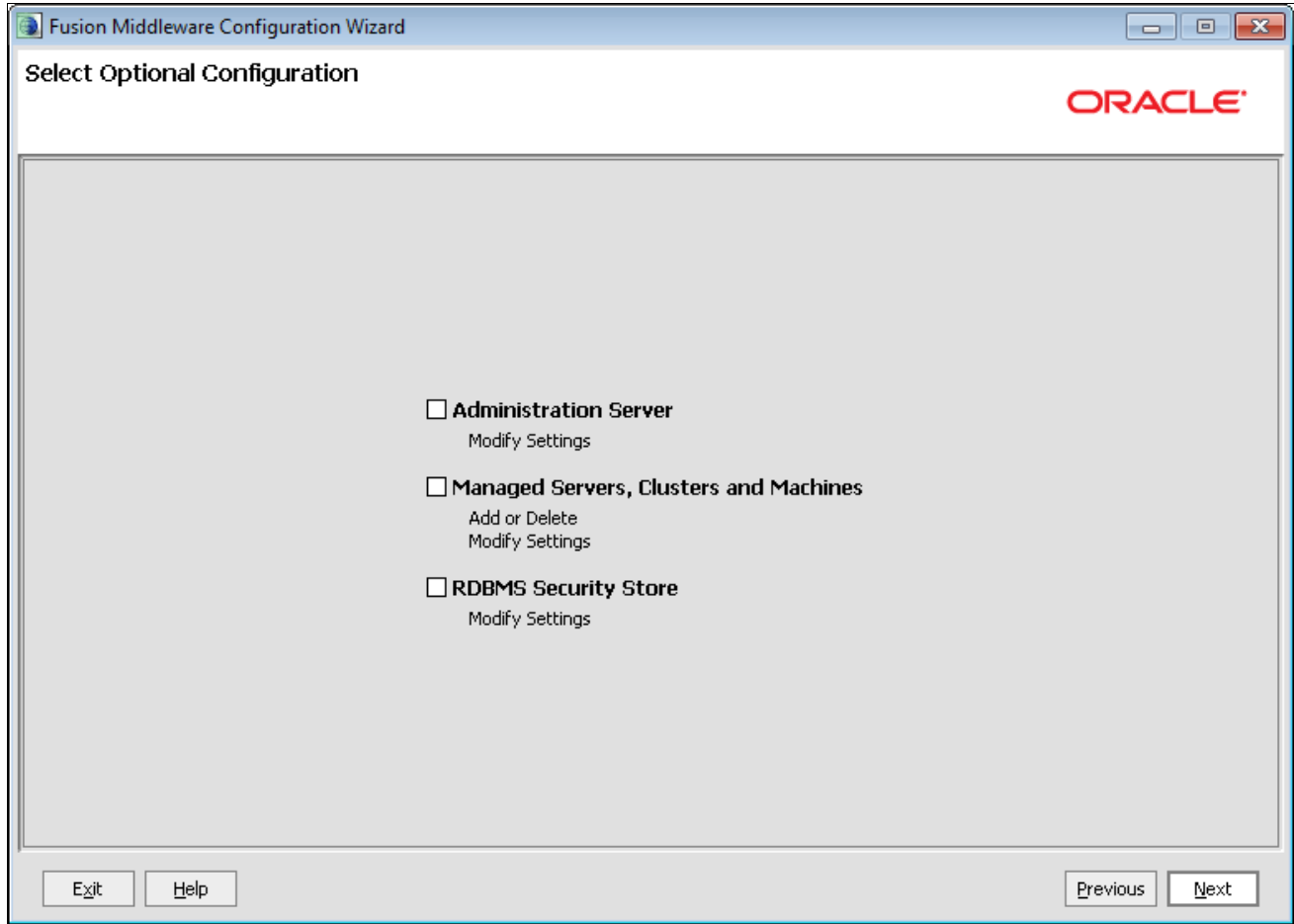


Fusion Middleware Configuration Wizard - Configure Server Start Mode and JDK page

Note. Make sure you select JDK7 during the mobile server domain creation. PeopleTools requires JDK7 for mobile authentication security. If JDK7 is not selected, then users cannot log in to mobile application after the deployment. The tools will fail to authenticate the user at the time of login.

- 9. On the Configure Server Start Mode and JDK page, accept the default options Development Mode and Available JDKs, and click Next.

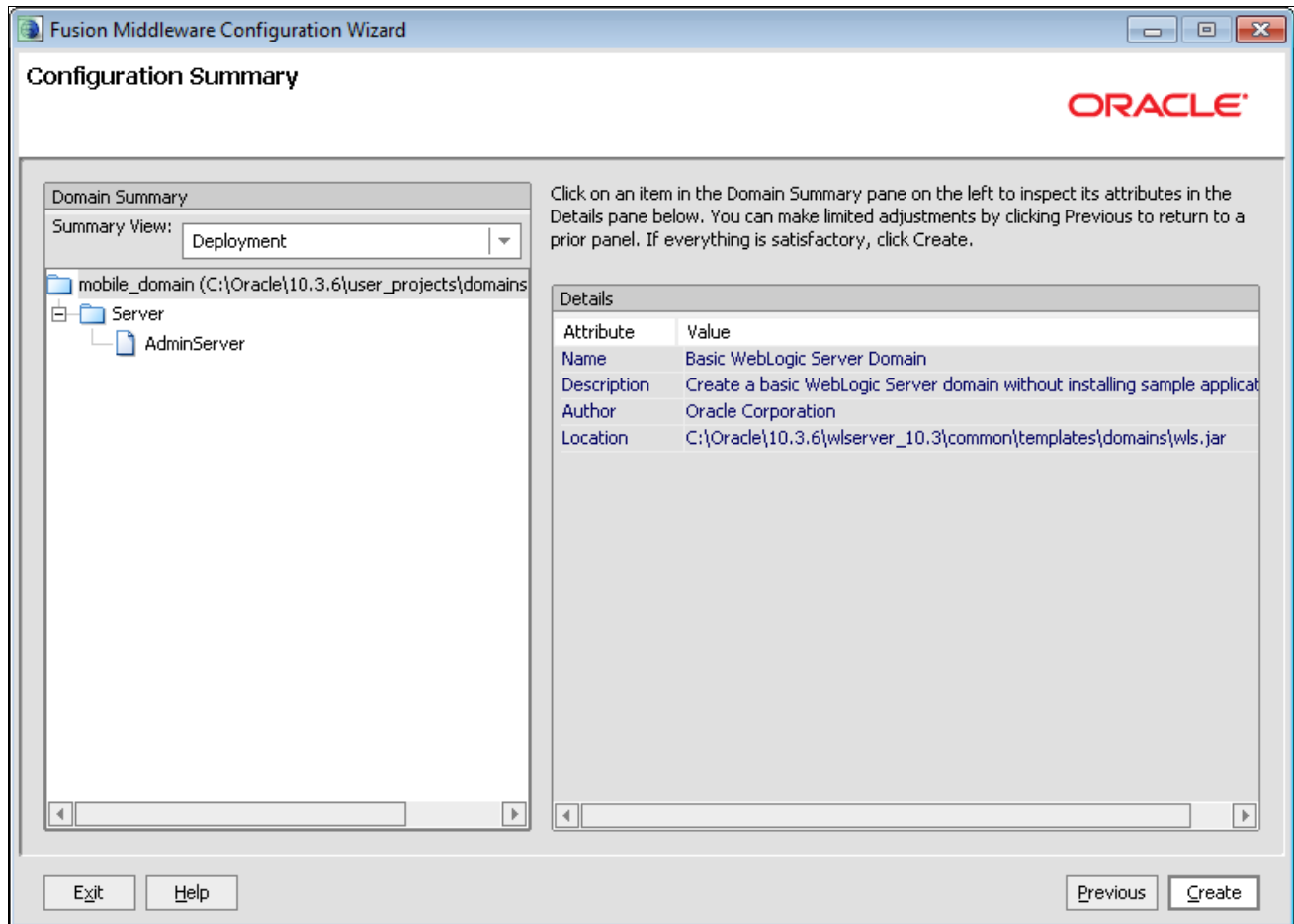
The Fusion Middleware Configuration Wizard - Select Optional Configuration page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Optional Configuration page

10. The Select Optional Configuration page requires no action. Click Next.

Click Next until you reach the Fusion Middleware Configuration Wizard - Configuration Summary page, as shown in the following example:



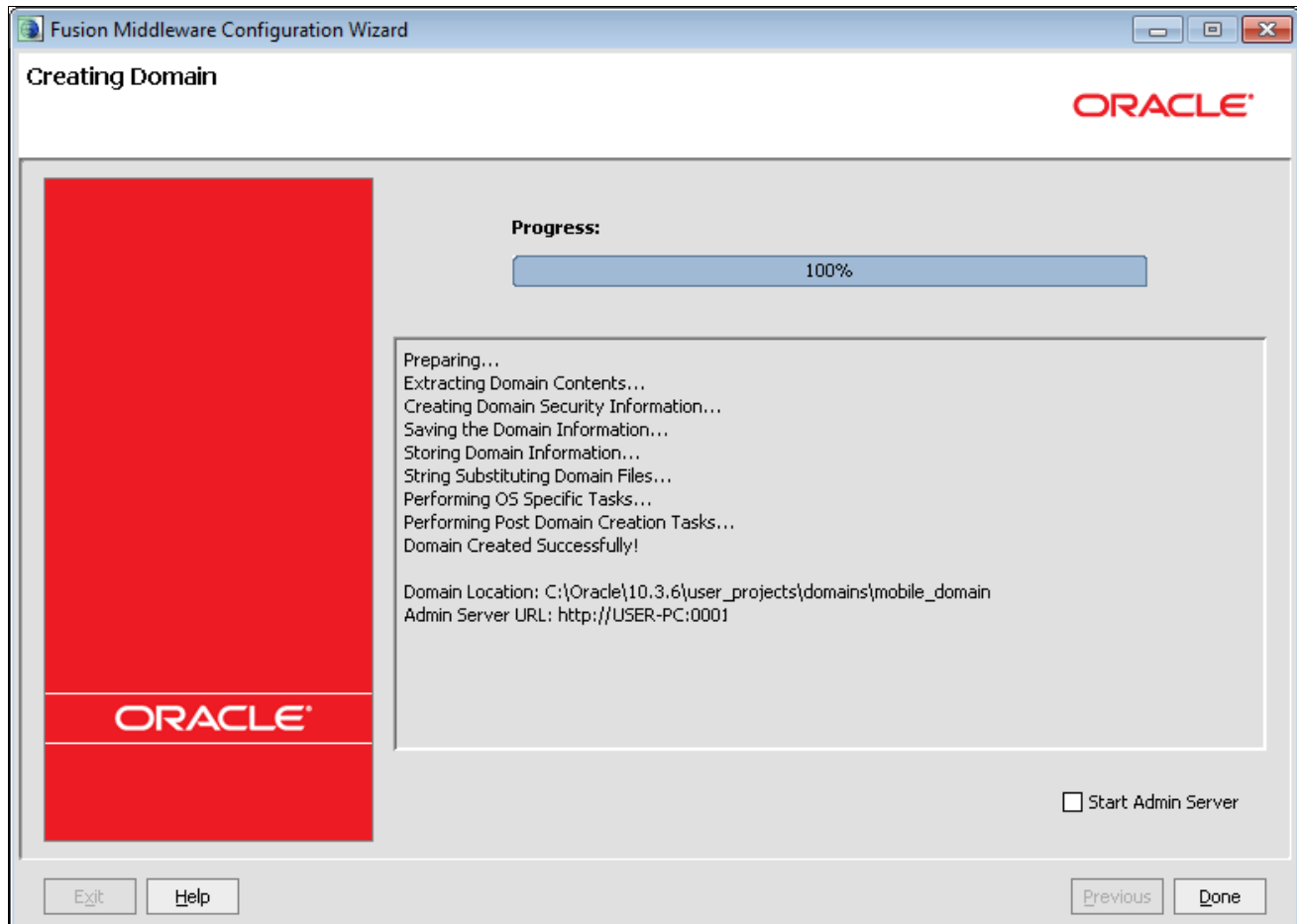
Fusion Middleware Configuration Wizard - Configuration Summary page

11. On the Configuration Summary page, click an item in the Domain Summary pane on the left to review your configuration details.

If you need to make corrections, click the Previous button and modify your details.

12. After you confirm and adjust the configuration details, click the Create button.

The Fusion Middleware Configuration Wizard - Creating Domain page appears showing the domain creation progress, as shown in the following example:



Fusion Middleware Configuration Wizard - Creating Domain progress page

13. On the Creating Domain progress page, when the domain creation progress reaches 100%, click the Done button.

Task 20-3: Installing the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management

This section discusses:

- Understanding the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management
- Installing the Oracle Application Development Runtime Installer
- Configuring Components Using the Configuration Wizard
- Starting the Administration Server

Understanding the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management

This task discusses the Oracle Application Development Runtime Installer for use with PeopleSoft Mobile Inventory Management. You must configure and activate the Oracle WebLogic Server to pass data between PeopleSoft and mobile devices.

See Installing the Oracle WebLogic Server for Mobile.

Note. Oracle Application Development Runtime Installer requires a graphical environment. To run the installation program in graphical mode, the console attached to the machine on which you are installing the software must support a Java-based GUI. All consoles for Microsoft Windows systems support Java-based GUIs, but not all consoles for UNIX systems do.

The system requires a Java-enabled web server to extend the PeopleSoft architecture to the internet and intranet. When you install the PeopleSoft Pure Internet Architecture on the web server, you install a collection of PeopleSoft Java servlets that handle a wide range of PeopleSoft transactions originating from the internet or intranet. PeopleSoft PeopleTools provides and supports the Oracle WebLogic Server for use within your PeopleSoft implementation.

Oracle WebLogic is a server software application that runs on a middle-tier between back-end databases (in this case, the PeopleSoft database) and related applications and browser-based thin clients (in this case, mobile devices). The Oracle WebLogic Server supports the Oracle Application Development Runtime and the Application Developer Mobile browser that extends Oracle Application Development Runtime to browsers running on mobile devices. The following steps detail a *general* installation of the Oracle Application Development Runtime for PeopleSoft Mobile Inventory Management.

Note. You only install the Oracle Application Development Runtime one time per Oracle WebLogic Server installation.

Task 20-3-1: Installing the Oracle Application Development Runtime Installer

To install the Oracle Application Development Runtime Installer for PeopleSoft Mobile Inventory Management:

Note. You can access the complete installation guide for the Oracle Application Developer 11.1.1.6 or 11.1.1.7 from the Oracle Fusion Middleware Documentation Library at:

http://download.oracle.com/docs/cd/E12839_01/index.htm

1. Download the Oracle Application Development Runtime Installer from the Oracle Technology Network as described previously.

See the section Accessing Installation Files earlier in this chapter.

2. Start the installer by going to the directory where you unpacked the archive file and switch to the Disk1 directory.

- On UNIX operating systems:

```
cd unpacked_archive_directory/Disk1 ./runInstaller -jreLoc JRE_LOCATION
```

- On Microsoft Windows operating systems:

```
cd unpacked_archive_directory\Disk1 setup.exe -jreLoc JRE_LOCATION
```

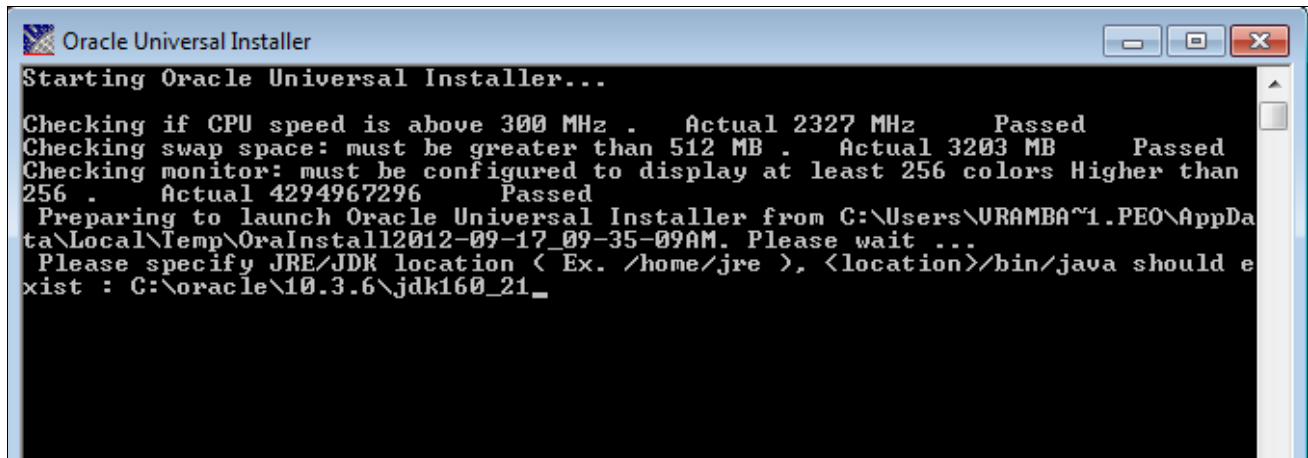
This starts the Installation Wizard, and the Oracle Universal Installer command window appears.

3. In the command window, enter your JDK directory (if you did not use the `-jreLoc` parameter when launching the installer).

For example: `C:\Oracle\10.3.6\jdk170_13`.

Note. If you are installing on a 64-bit server, you must download and install the appropriate 64-bit Java from www.java.com before you proceed with this installation. Refer the section titled Prerequisites at the beginning of this chapter.

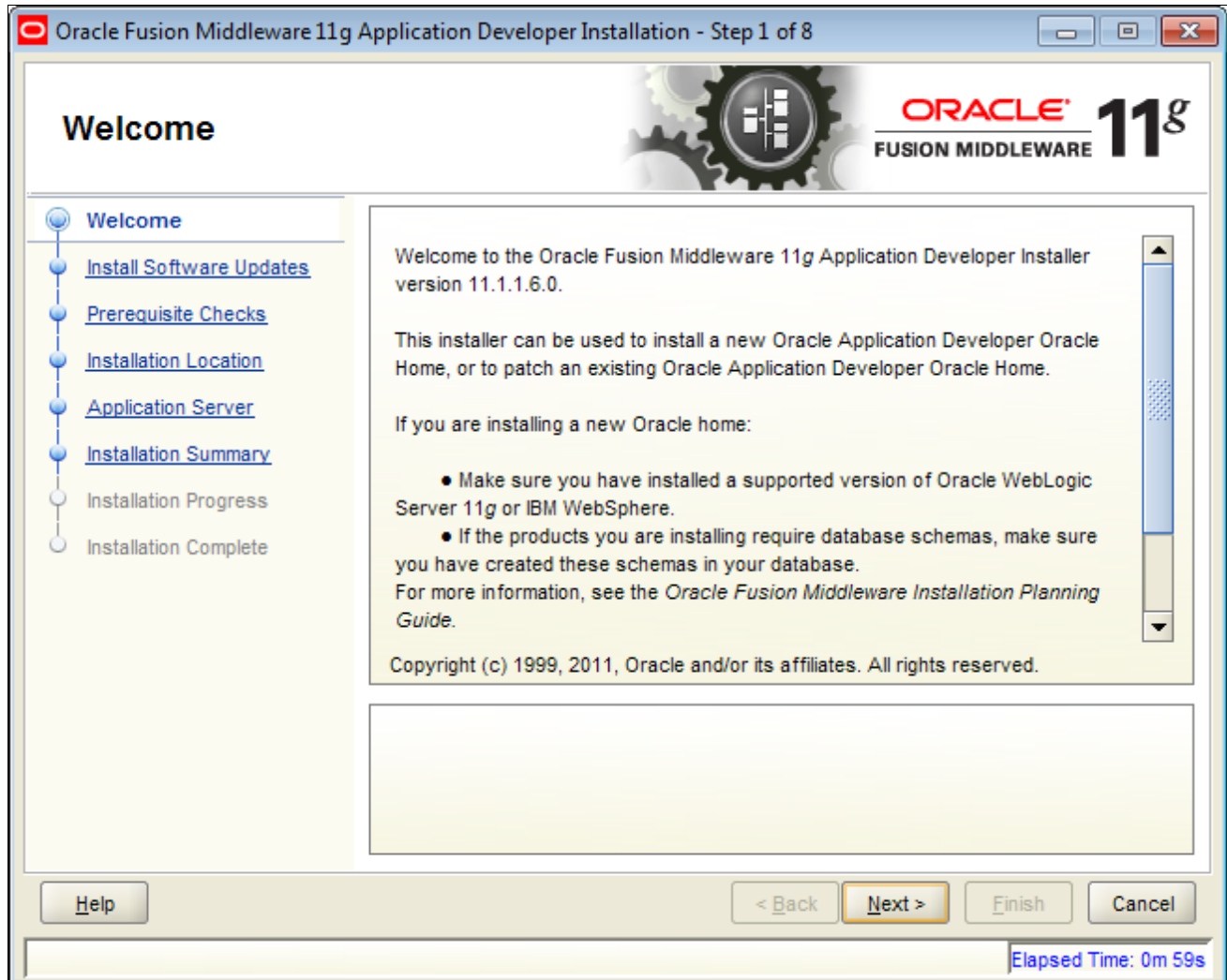
The following example shows the Oracle Universal Installer command window with the JDK directory:



```
Oracle Universal Installer
Starting Oracle Universal Installer...
Checking if CPU speed is above 300 MHz . Actual 2327 MHz Passed
Checking swap space: must be greater than 512 MB . Actual 3203 MB Passed
Checking monitor: must be configured to display at least 256 colors Higher than
256 . Actual 4294967296 Passed
Preparing to launch Oracle Universal Installer from C:\Users\URAMBA~1\PEO\AppData
ta\Local\Temp\OraInstall2012-09-17_09-35-09AM. Please wait ...
Please specify JRE/JDK location < Ex. /home/jre >, <location>/bin/java should e
xist : C:\oracle\10.3.6\jdk160_21_
```

Oracle Universal Installer command window with JDK directory

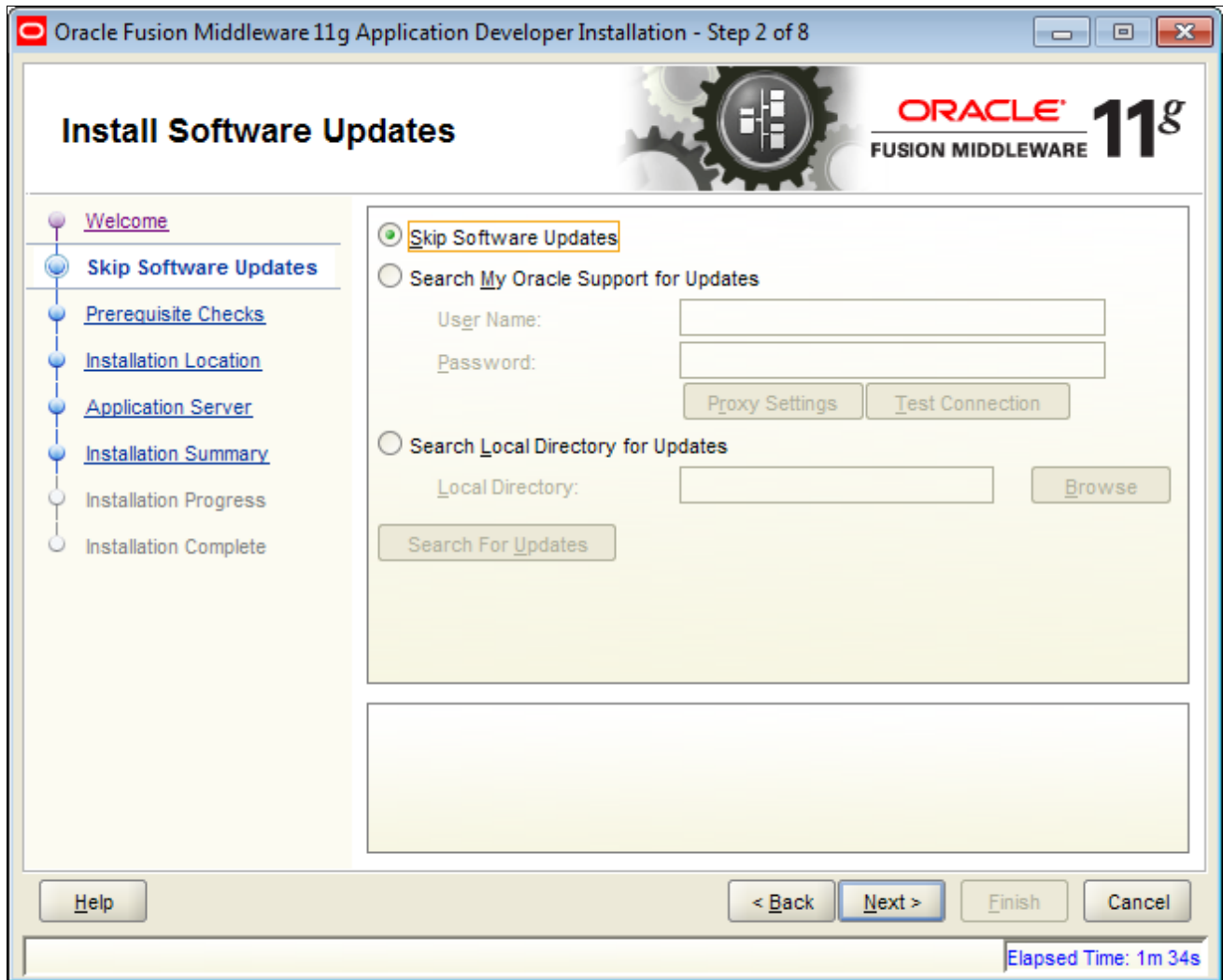
The Oracle Fusion Middleware 11g Application Developer Installation - Welcome page appears (Step 1 of 8), as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation: Welcome page

- 4. On the Welcome page, click Next.

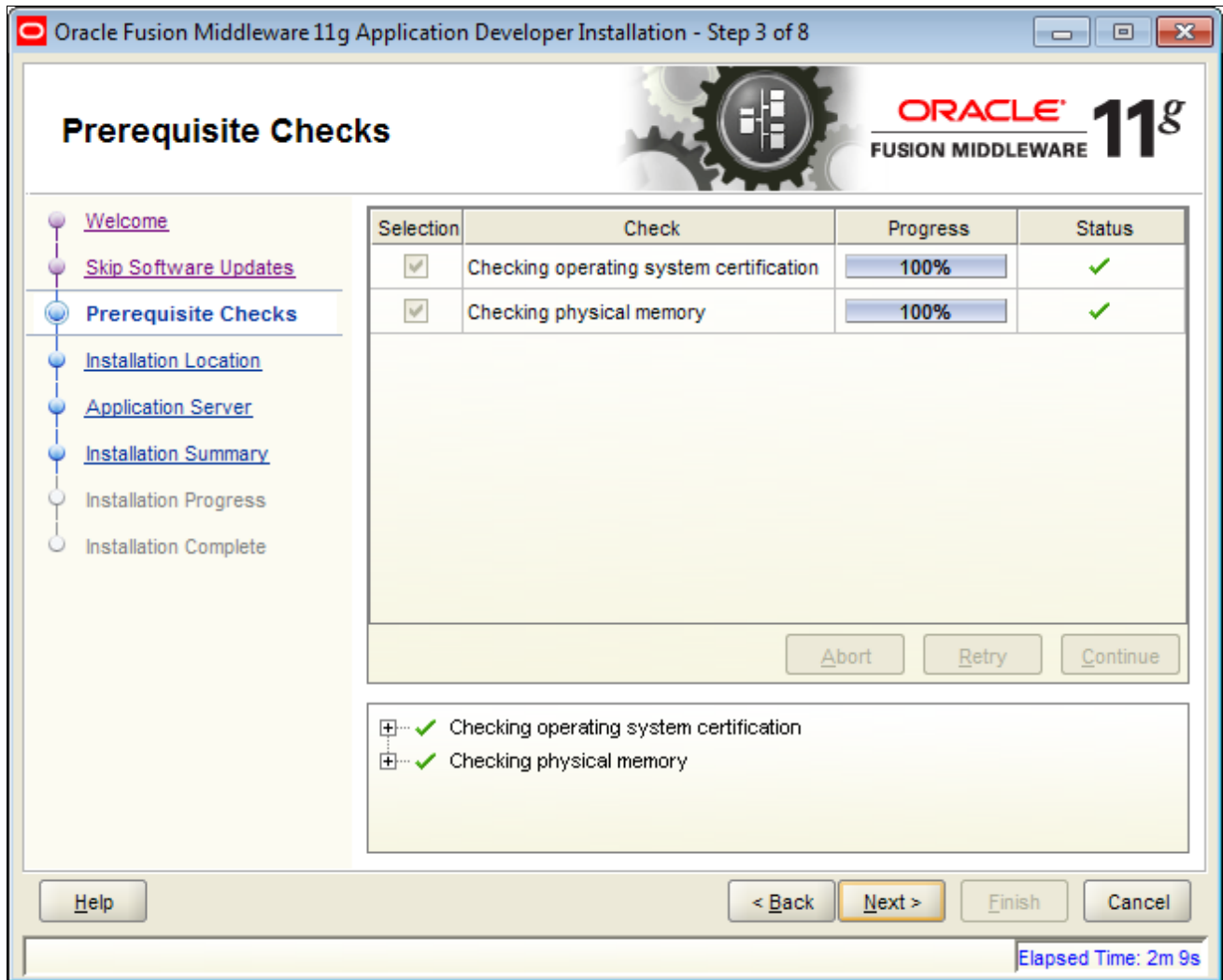
The Oracle Fusion Middleware Application Developer Installation - Install Software Updates page (Step 2 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation: Install Software Updates page

- On the Install Software Updates page, select the option Skip Software Updates. Click Next.

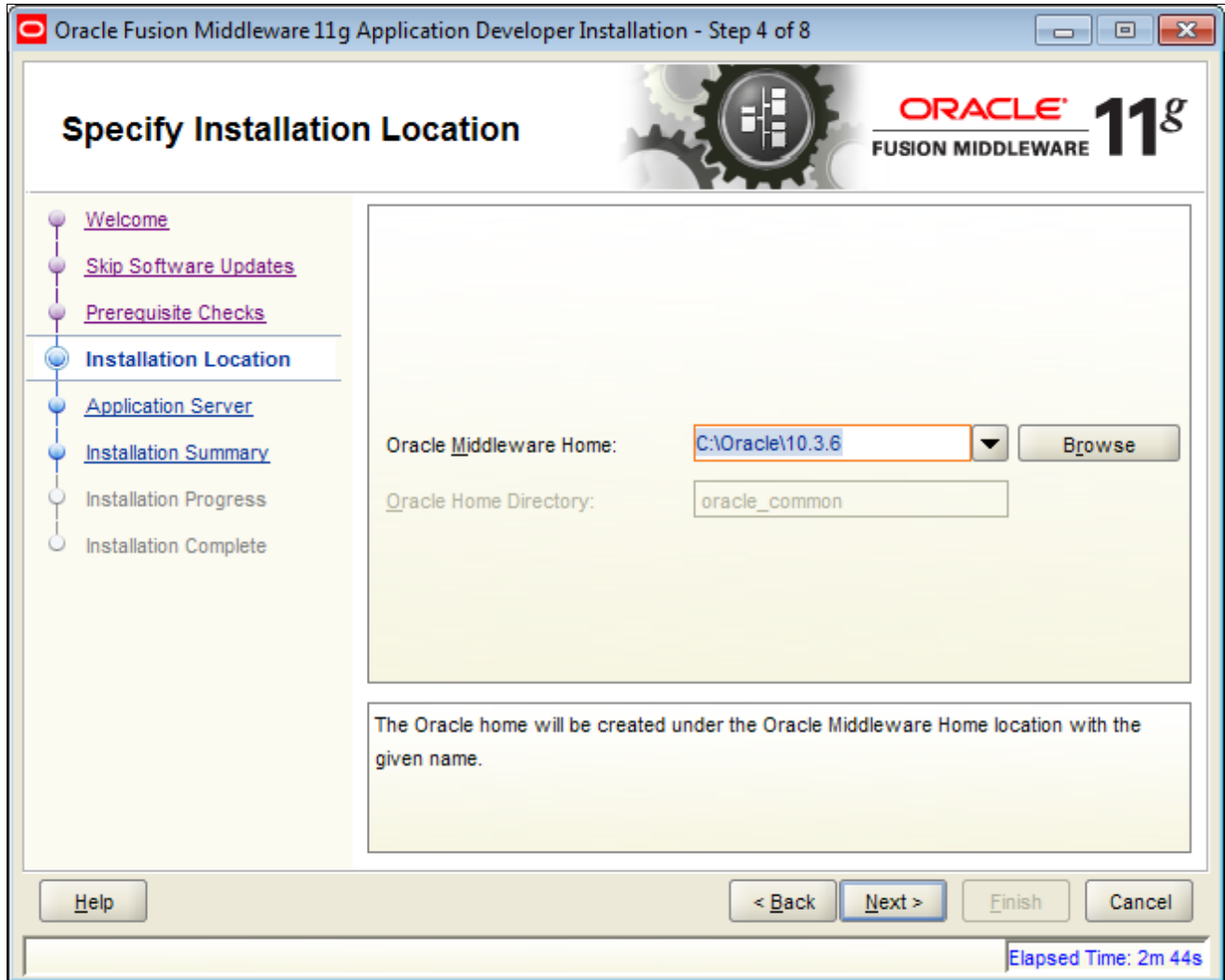
The Oracle Fusion Middleware Application Developer Installation - Prerequisite Checks page (Step 3 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation: Prerequisite Checks page

- 6. On the Prerequisite Checks page, click Next.

The Oracle Fusion Middleware Application Developer Installation - Specify Installation Location page (Step 4 of 8) appears, as shown in the following example:



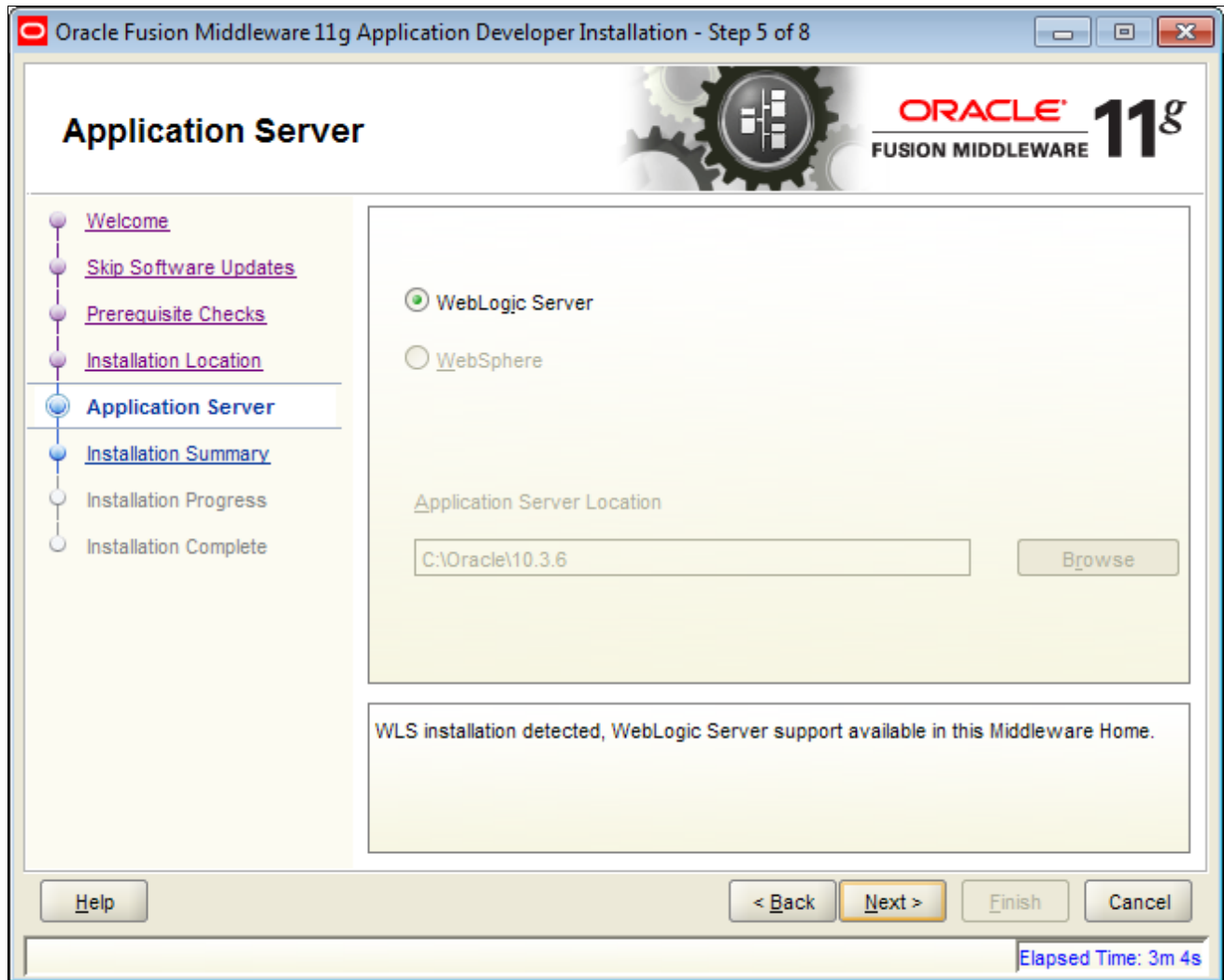
Oracle Fusion Middleware 11g Application Developer Installation: Specify Installation Location page

- 7. On the Specify Installation Location page, in the Oracle Middleware Home field, enter your Middleware Home location where the Oracle WebLogic Server is installed.

For example: *C:\Oracle\10.3.6*

8. Click Next.

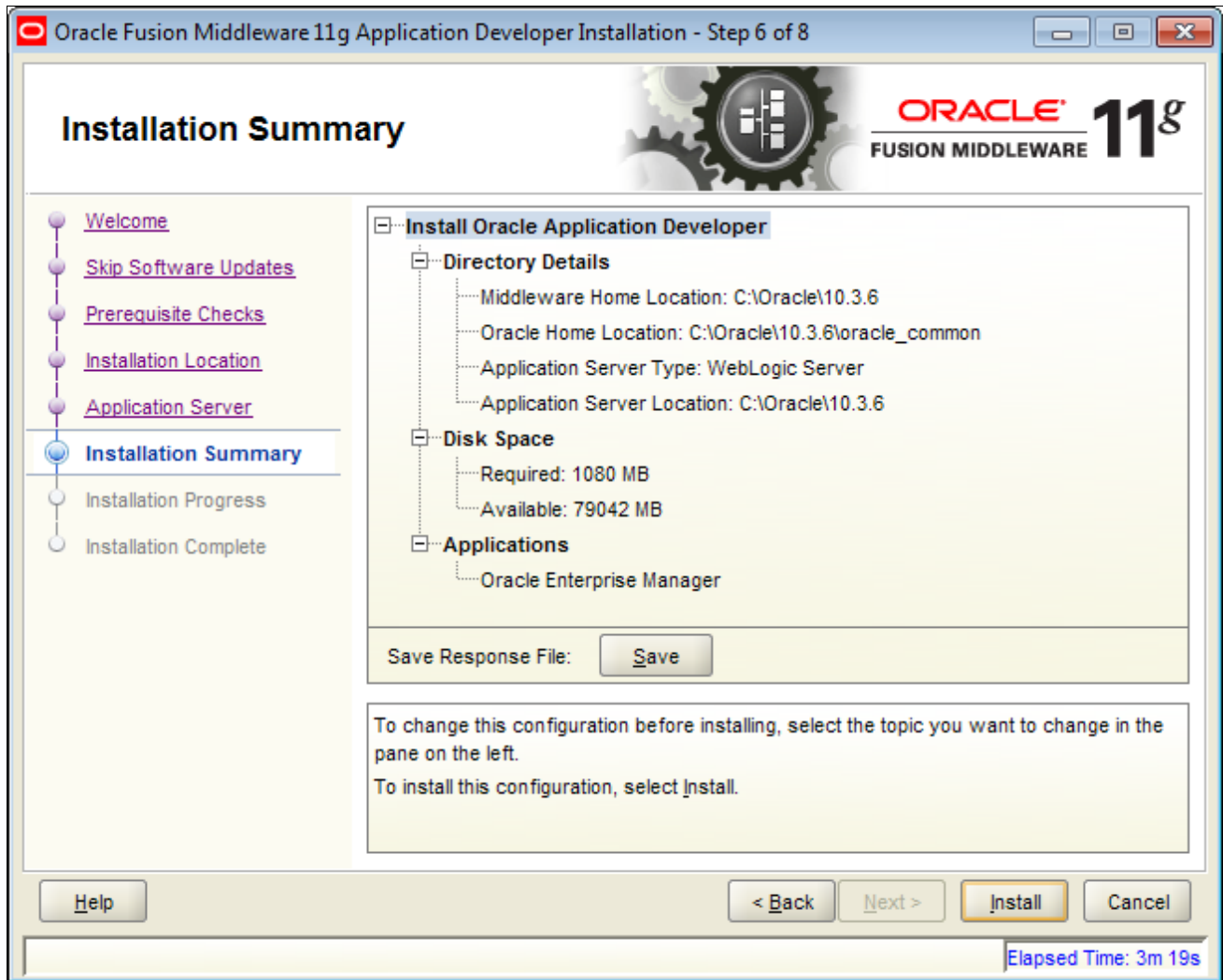
The Oracle Fusion Middleware Application Developer Installation - Application Server page (Step 5 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation: Application Server page

9. On the Application Server page, click Next.

The Oracle Fusion Middleware Application Developer Installation - Installation Summary page (Step 6 of 8) appears, as shown in the following example:

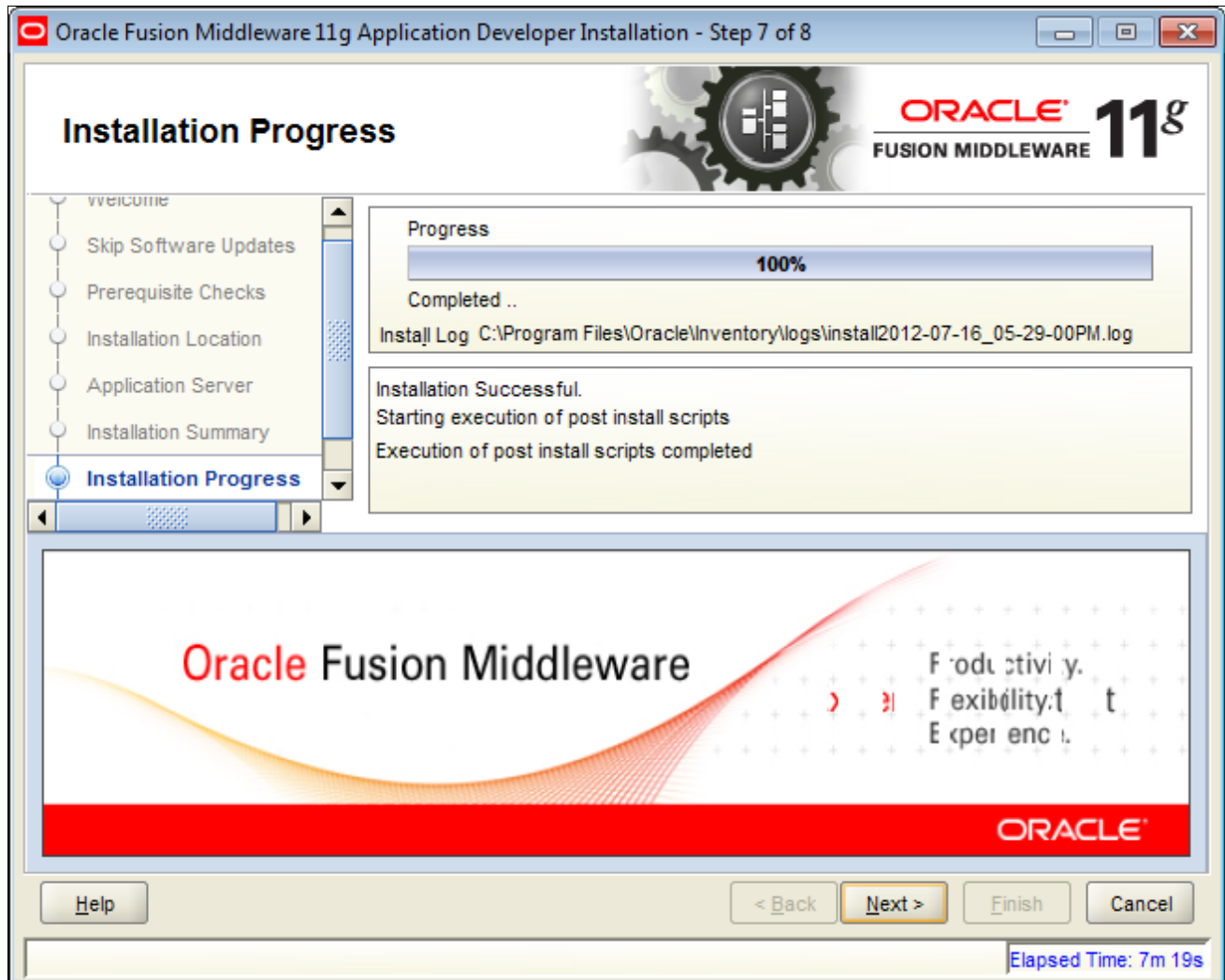


Oracle Fusion Middleware 11g Application Developer Installation: Installation Summary page

10. On the Installation Summary page, review your installation details and then click the Install button.

If you need to make a correction, click the Back button and modify your details.

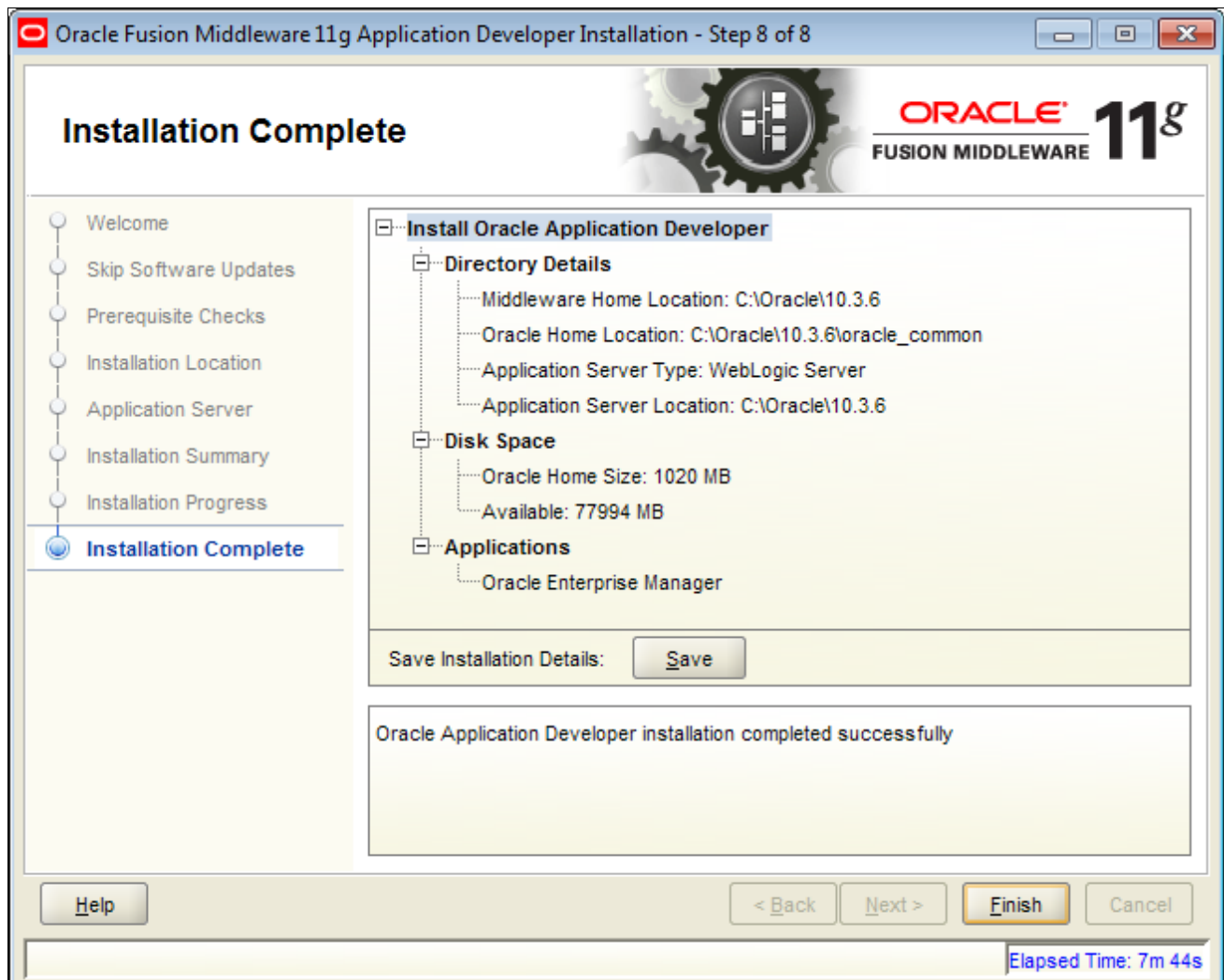
The Oracle Fusion Middleware Application Developer Installation - Installation Progress page (Step 7 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation: Installation Progress page

11. When the installation progress reaches 100%, click the Next button.

12. Click Next until the Oracle Fusion Middleware Application Developer Installation - Installation Complete page (Step 8 of 8) appears, as shown in the following example:



Oracle Fusion Middleware 11g Application Developer Installation: Installation Complete page

13. On the Installation Complete page, click Finish.

Task 20-3-2: Configuring Components Using the Configuration Wizard

After the installation is complete, you can configure the components using the Fusion Middleware Configuration Wizard. The Configuration Wizard is located in the common/bin directory inside the product Oracle home.

To configure components using the Fusion Middleware Configuration Wizard:

1. Start the Configuration Wizard by navigating to the directory as follows:

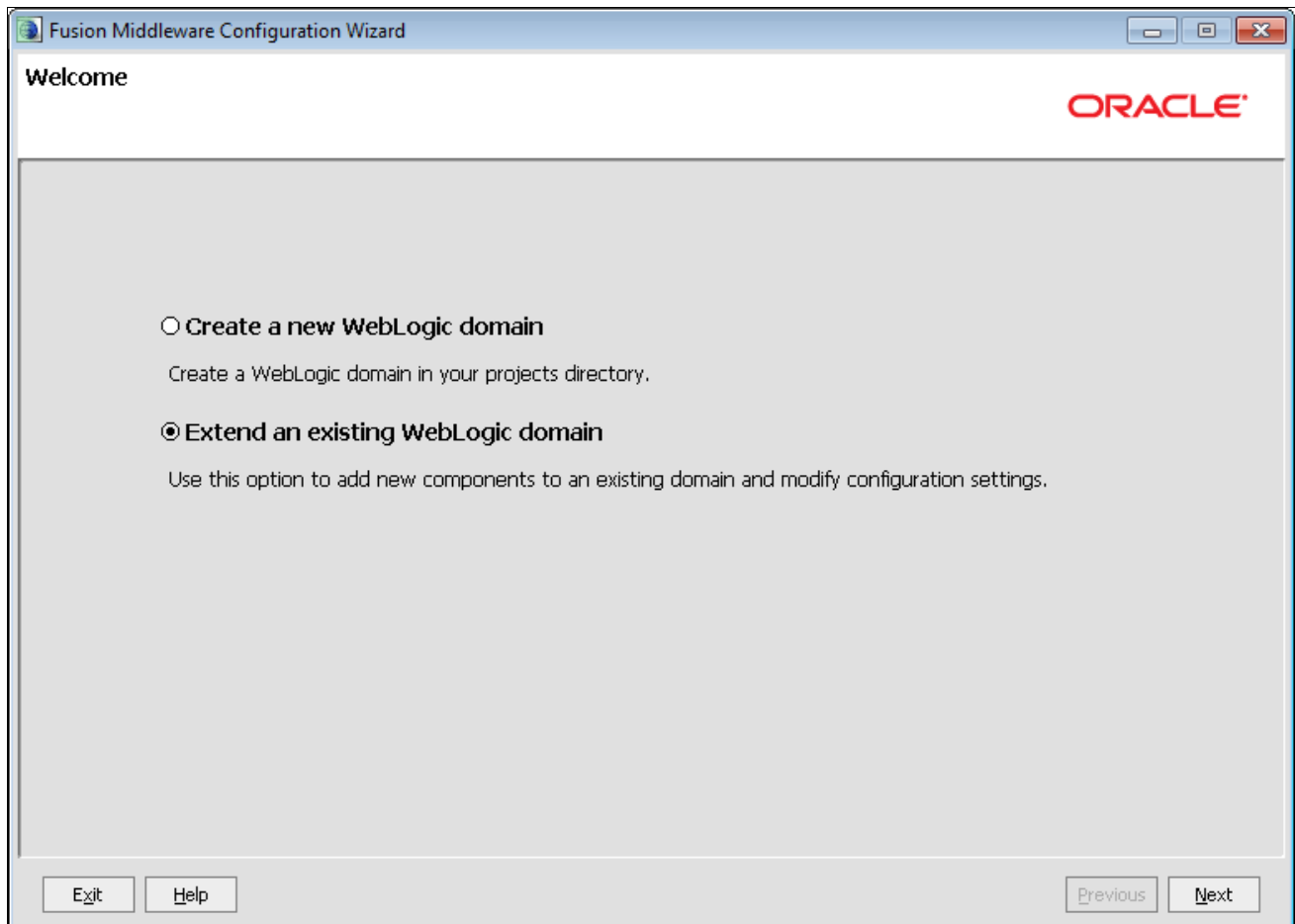
On UNIX operating systems:

```
cd MW_HOME/oracle_common/common/bin  
  
. config.sh
```

On Microsoft Windows operating systems:

```
cd MW_HOME\oracle_common\common\bin  
  
config.cmd
```

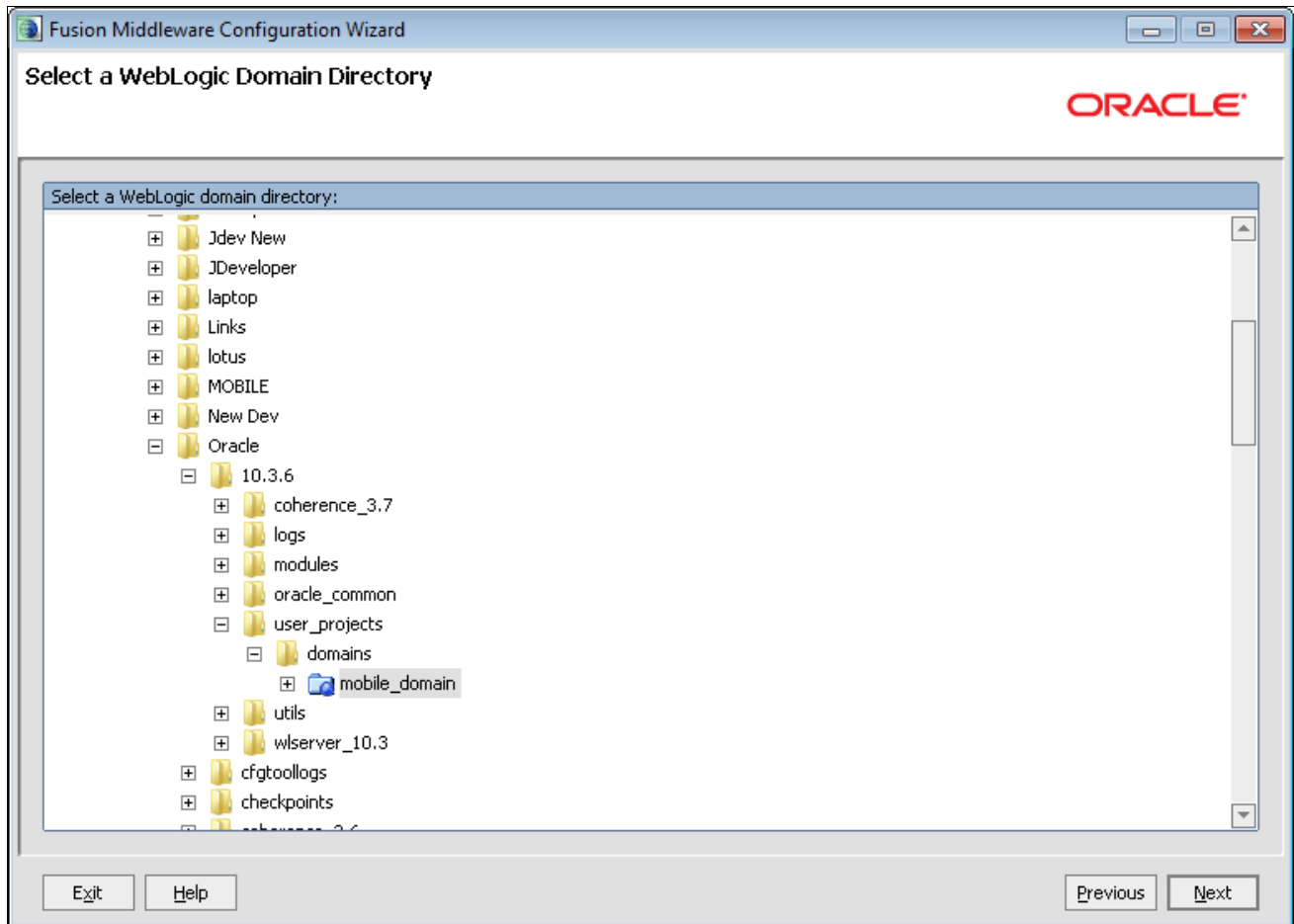
The Fusion Middleware Configuration Wizard - Welcome page appears, as shown in the following example:



Fusion Middleware Configuration Wizard: Welcome page

2. On the Welcome page, select the option Extend an existing WebLogic domain and click Next.

The Fusion Middleware Configuration Wizard - Select a WebLogic Domain Directory page appears, as shown in the following example:

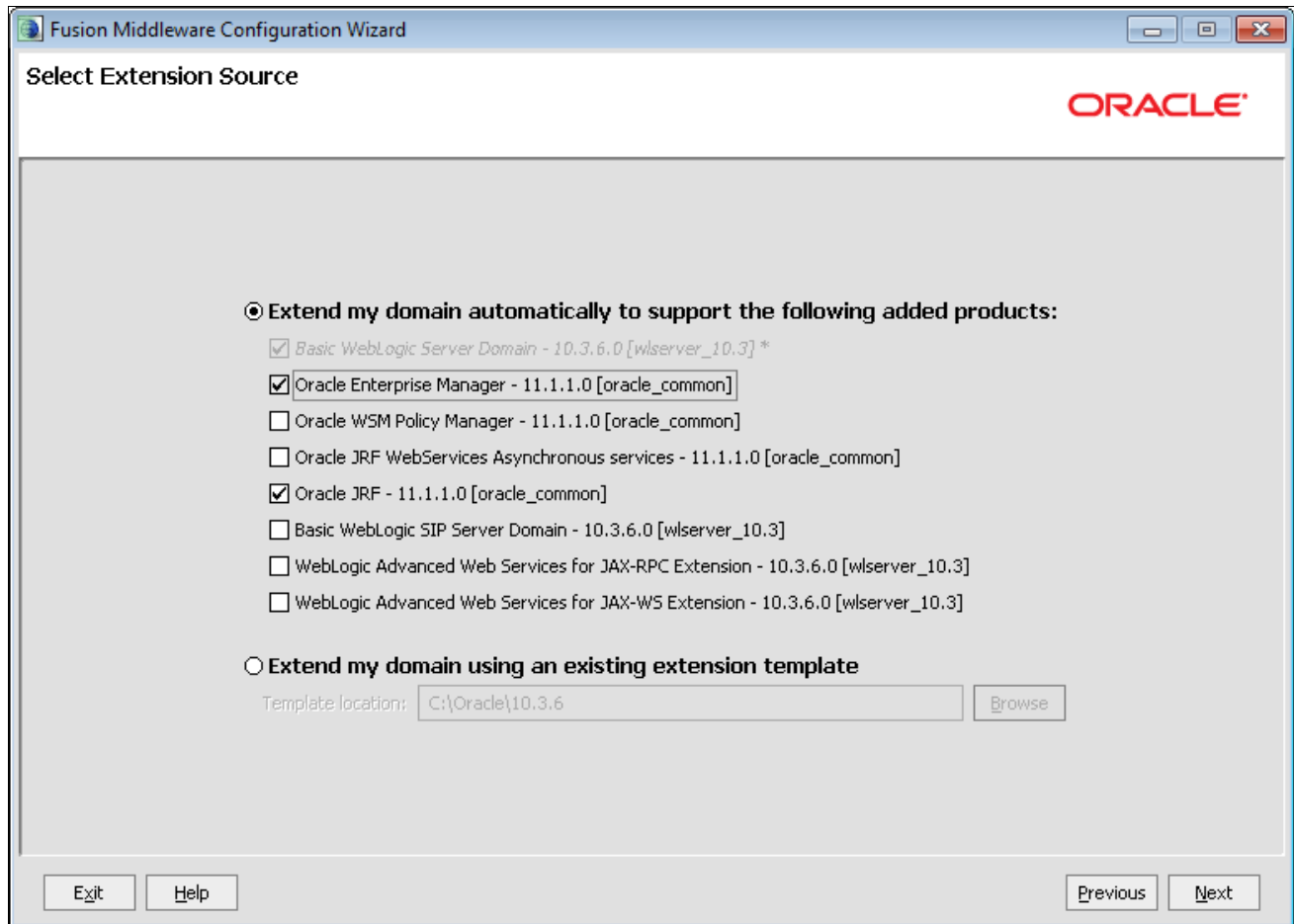


Fusion Middleware Configuration Wizard: Select a Weblogic Domain Directory page

3. On the Select a WebLogic Domain Directory page, select your Target Domain.
For example: Mobile_Domain.

4. Click Next.

The Fusion Middleware Configuration Wizard - Select Extension Source page appears, as shown in the following example:



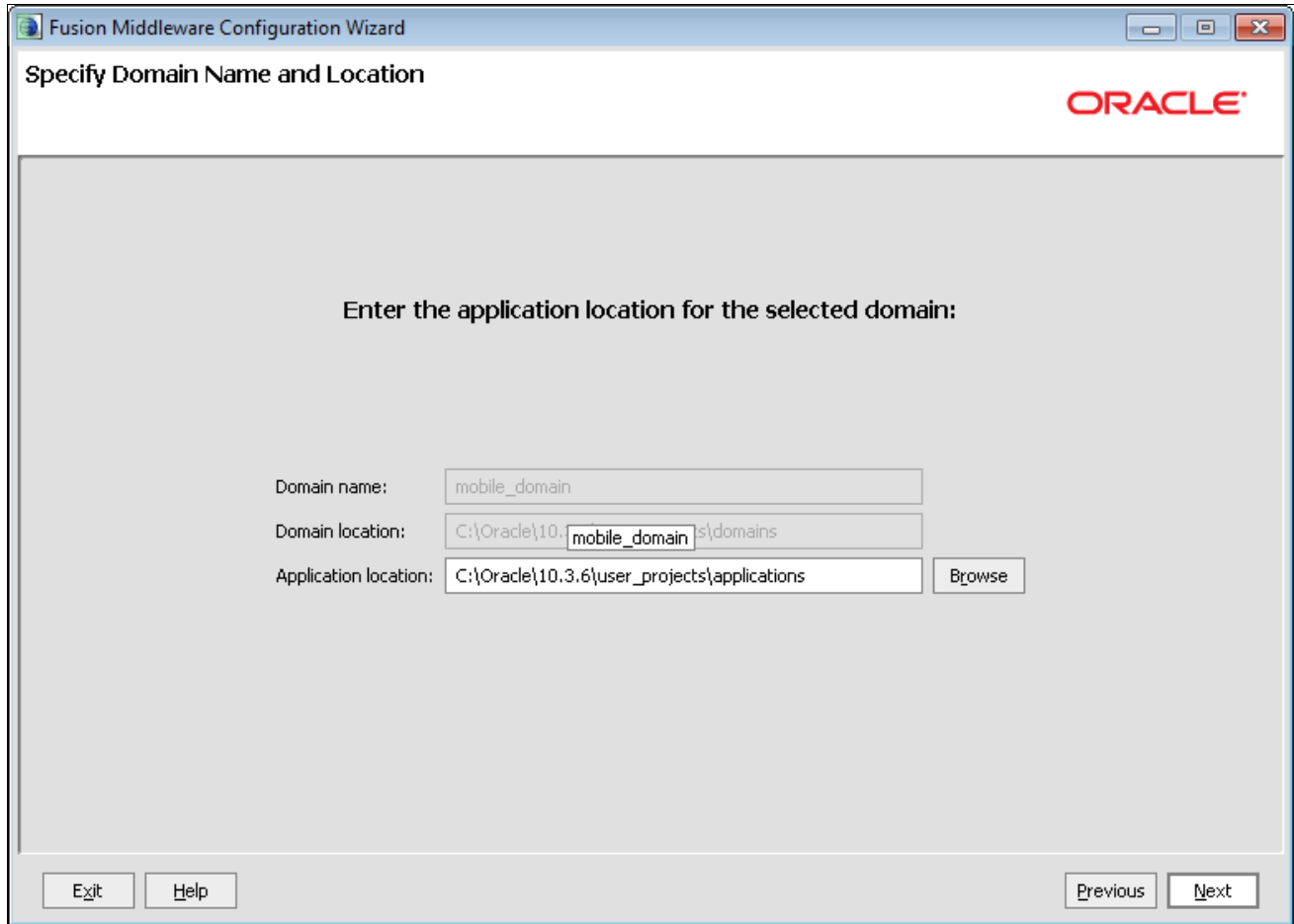
Fusion Middleware Configuration Wizard: Select Extension Source page

5. On the Select Extension Source page, do the following:

- Select the option Extend my domain automatically to support the following added products.
- Select the Oracle Enterprise Manager - 11.1.1.0 [oracle_common] check box.
- Select the Oracle JRF - 11.1.1.0 [oracle_common] check box.

6. Click Next.

The Fusion Middleware Configuration Wizard - Specify Domain Name and Location page appears, as shown in the following example:

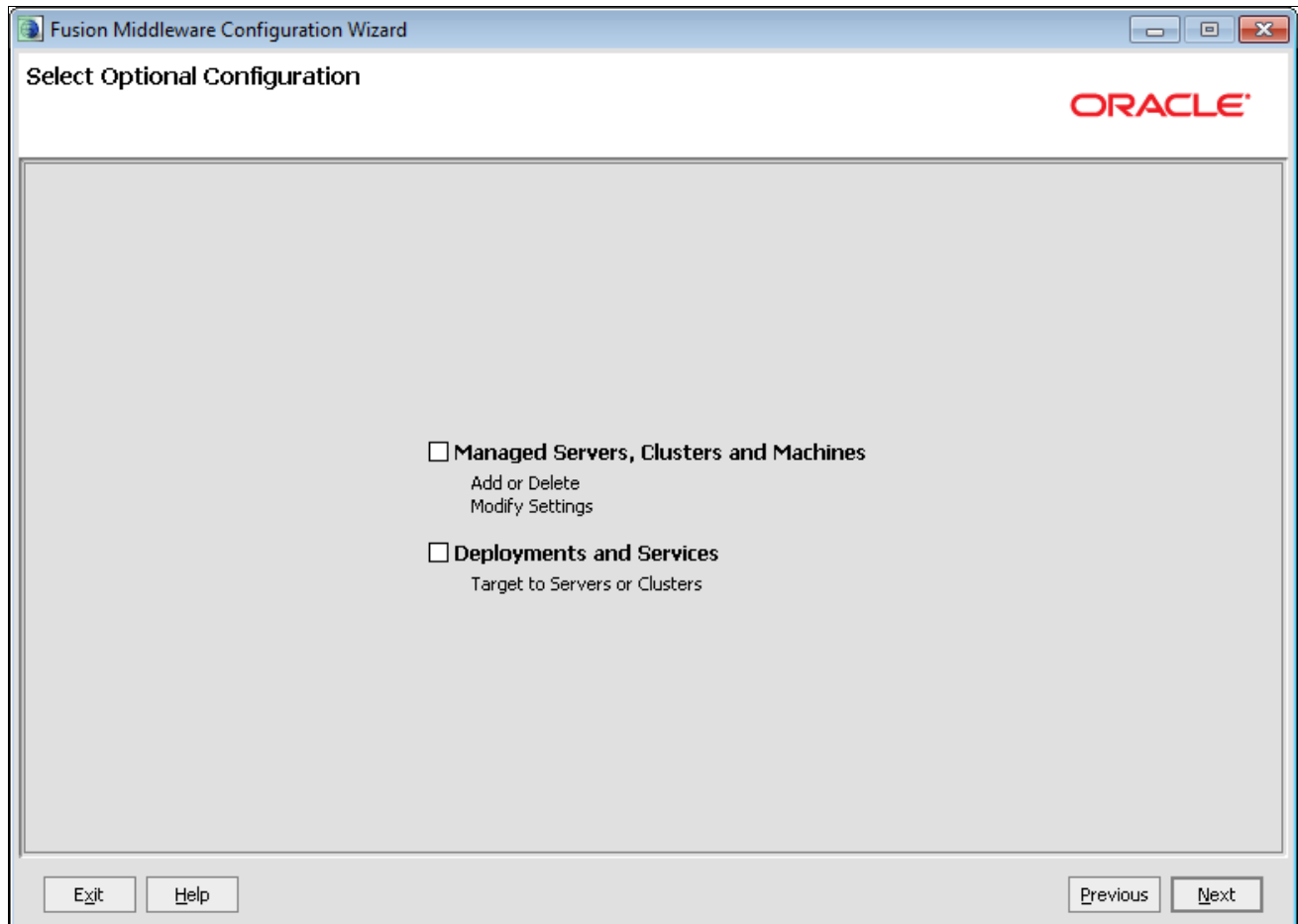


Fusion Middleware Configuration Wizard: Specify Domain Name and Location page

7. On the Specify Domain Name and Location page, click Next.

In an earlier step, you specified the domain name and the location that now populate these fields.

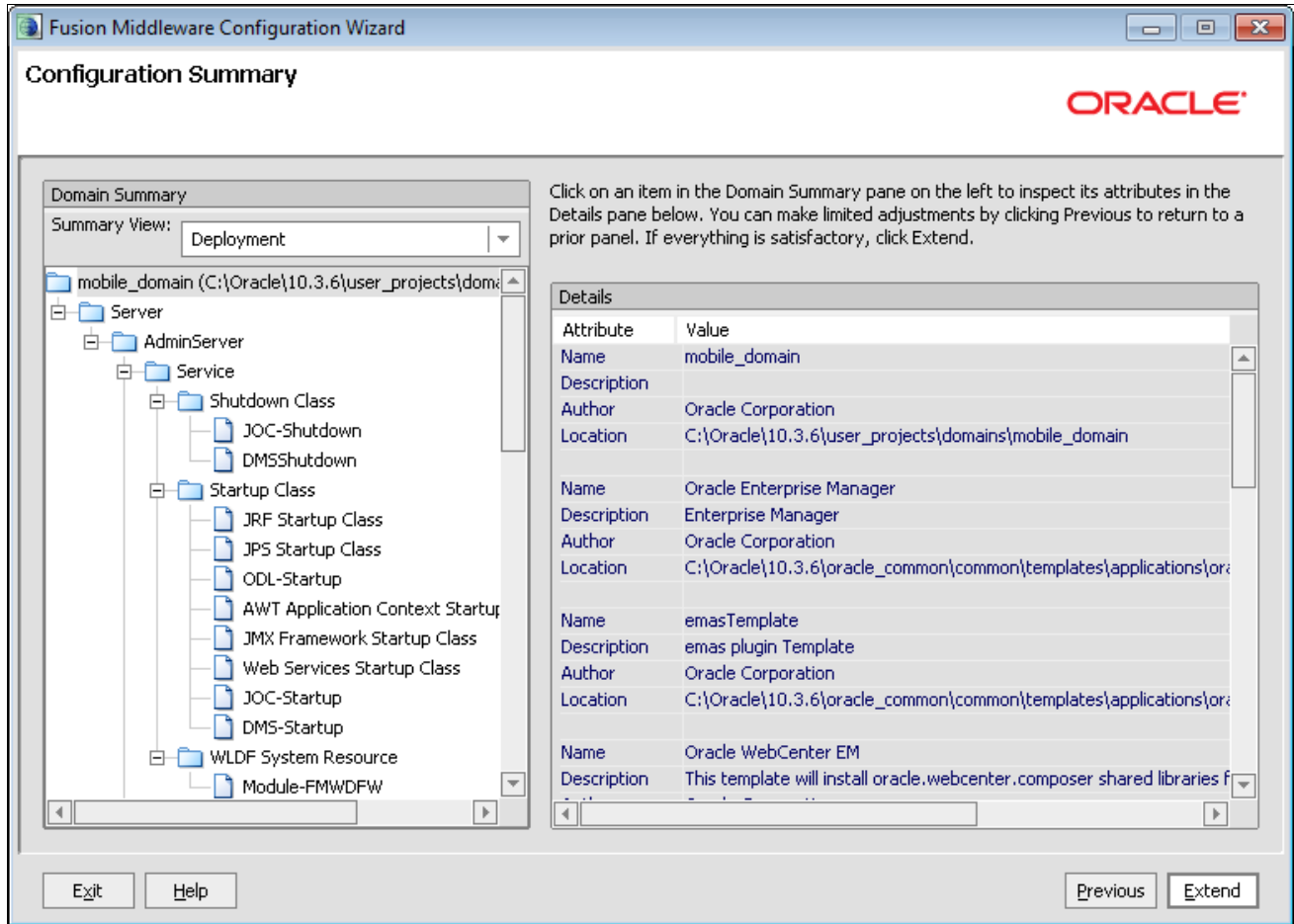
The Fusion Middleware Configuration Wizard - Select Optional Configuration page appears, as shown in the following example:



Fusion Middleware Configuration Wizard: Select Optional Configuration page

- 8. The Select Optional Configuration page requires no action. Click Next.

The Fusion Middleware Configuration Wizard - Configuration Summary page appears, as shown in the following example:

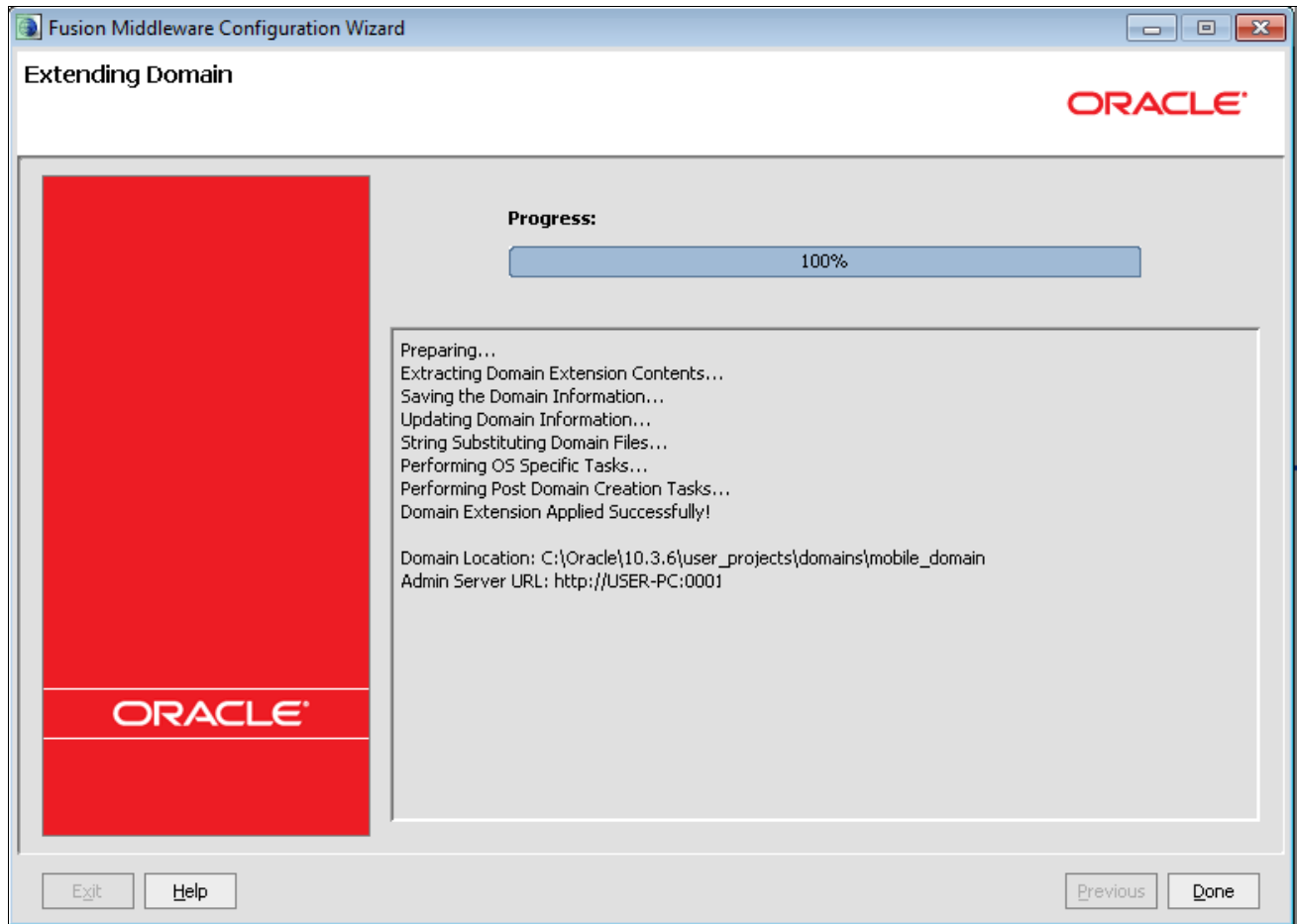


Fusion Middleware Configuration Wizard: Configuration Summary page

9. On the Configuration Summary page, review your configuration details and then click the Extend button.

If you need to make corrections, click the Previous button to go back and modify your details.

The Fusion Middleware Configuration Wizard - Extending Domain page appears, as shown in the following example:



Fusion Middleware Configuration Wizard: Extending Domain page

10. On the Extending Domain page, click the Done button.

To create additional domains:

1. Refer to the task Installing the Oracle Application Development Runtime Installer earlier in this chapter.
2. On the Welcome page, select the option Create a new WebLogic domain instead of Extend a WebLogic domain.
3. For the remainder of the options, use the same selections as previously described.
4. Repeat steps 2 and 3 for each additional domain.

Task 20-3-3: Starting the Administration Server

To get your deployments up and running, you must start the Administration Server. You can do this by running the startWebLogic.sh script (on UNIX operating systems) or the startWebLogic.cmd script (on Microsoft Windows operating systems) in the directory where you created your new domain.

To start the Administration Server, navigate to and run the appropriate script, as follows:

- On UNIX systems:
DOMAIN_HOME/startWebLogic.sh
- On Microsoft Windows systems:
DOMAIN_HOME\startWebLogic.cmd

You entered the domain name and location on the Specify Domain Name and Location screen in the Configuration Wizard.

Task 20-4: Applying the PeopleSoft Mobile Inventory Management Authentication Provider

This section discusses:

- Understanding the PeopleSoft Authentication Provider
- Prerequisites
- Copying the wPSFTSecurityProviders.jar File
- Copying the PeopleSoft psjoa.jar File
- Adding the PeopleSoft Authentication Provider to the Active Security Realm

Understanding the PeopleSoft Authentication Provider

The PeopleSoft Authentication Provider authenticates a user name and password by connecting to a PeopleSoft Application Server. With successful authentication, the system creates a Principal and Subject, identifying the authorized use of a secure web server session. The system can use this subject to run a secure web session and provide WS-Security parameters for subsequent calls to the PeopleSoft system.

To apply the PeopleSoft Mobile Inventory Management Authentication Provider, you must perform the procedures in this section, for either Microsoft Windows or UNIX, to copy the necessary .jar files and then add the authentication provider to the security realm.

Prerequisites

Before you begin, verify that you meet the following requirements:

- Access to the wPSFTSecurityProviders.jar file.

The file location is in *PS_APP_HOME*\setup\oracle\adf\MobileInventory.

The wPSFTSecurityProviders.jar file can be found in the preceding directory location *after* you complete the Bundle 16 installation instructions that include the task titled Installing PeopleSoft Mobile Inventory Management.

- Access to the psjoa.jar file.

Oracle delivers the psjoa.jar file as part of PeopleSoft PeopleTools. This file must come from the version of PeopleTools that is running your application server.

For Microsoft Windows installations, this file is in the *PS_HOME*\web\psjoa\ subdirectory.

For UNIX installations, this file is in the *PS_HOME*\appserv\classes\ subdirectory.

Task 20-4-1: Copying the wPSFTSecurityProviders.jar File

The PSFTSecurityProviders.jar file is a Managed Bean (Mbean). The Mbeans contain meta information that the Oracle WebLogic Server understands. All Mbeans that Oracle WebLogic uses are in the %WL_HOME%\server\lib\mbeantypes directory.

Note. The %WL_HOME% referred to here is <installation directory>+wlserver_10.3 directory, *not* the parent installation directory <installation directory>.

For example, c:\bea1036\wlserver_10.3.

For Microsoft Windows:

Copy wPSFTSecurityProviders.jar to %WL_HOME%\server\lib\mbeantypes.

For UNIX:

Copy wPSFTSecurityProviders.jar to \${WL_HOME}/server/lib/mbeantypes.

Task 20-4-2: Copying the PeopleSoft psjoa.jar File

The PeopleSoft PeopleTools library file psjoa.jar must be accessible to the mobile application that is running on the Oracle WebLogic Server. The file psjoa is release dependent and *must* be the same PeopleSoft PeopleTools release as the version that you are running on the application server.

You must copy this jar file from your *PS_HOME* to the Mobile Inventory Oracle WebLogic Server and place it in the *WL_HOME*\server\lib\PeopleSoft\ directory.

Important! Each time you apply maintenance, you must also replace the psjoa.jar file. For example, if the PeopleSoft PeopleTools release changes from 8.54.08 to 8.54.xx, you must copy a new version of the psjoa.jar file to the Oracle WebLogic Server.

To copy the PeopleSoft the psjoa.jar file to the %WL_HOME%\server\lib\PeopleSoft\ directory, perform the following steps specific to Microsoft Windows or UNIX:

1. If you are running on Microsoft Windows, complete the following steps to copy the psjoa.jar file to the *WL_HOME*\server\lib\PeopleSoft\ directory:
 - a. Access your Mobile Inventory Oracle WebLogic Server.
 - b. Create a PeopleSoft directory under %WL_HOME%\server\lib\.
 - c. Copy the psjoa.jar file from your *PS_HOME*\web\psjoa to %WL_HOME%\server\lib\PeopleSoft\.
2. If you are running on UNIX, complete the following steps to copy the psjoa.jar file to the *WL_HOME*/server/lib/PeopleSoft/ directory:

(*PS_HOME* should be from a UNIX PeopleTools install.)

 - a. Access your Oracle WebLogic Server for Mobile Inventory.
 - b. Create a PeopleSoft directory under %WL_HOME%/server/lib.
 - c. Copy the psjoa.jar file from your *PS_HOME*/appserv/classes to \${WL_HOME}/server/lib/PeopleSoft/.
3. Update the Weblogic classpath.

Do this for the *entire* Oracle WebLogic install or for the *specific* domain where PeopleSoft Mobile Inventory is installed. For Microsoft Windows, you update the file ending in .cmd; for UNIX, you update the file ending in .sh.

For Microsoft Windows, update the file ending in .cmd:

- Entire Oracle WebLogic installation: Update the file %WL_HOME%\common\bin\commEnv.cmd and prepend the following to the WEBLOGIC_CLASSPATH environment variable:

```
%WL_HOME%\server\lib\PeopleSoft\psjoe.jar;
```

- Specific Domain: Update the file domain_path\bin\setDomainEnv.cmd and prepend the preceding to the PRE_CLASSPATH environment variable:

The psjoe.jar file must be a fully qualified path.

Note. If there is no PRE_CLASSPATH variable, add it to the file.

For example, set PRE_CLASSPATH=%WL_HOME%\server\lib\PeopleSoft\psjoe.jar.

For UNIX, update the file ending in .sh:

- Entire Oracle WebLogic installation: Update the file %WL_HOME%/common/bin/commEnv.sh and prepend the following to the WEBLOGIC_CLASSPATH environment variable.

```
${WL_HOME}/server/lib/PeopleSoft/psjoe.jar${CLASSPATHSEP}
```

Important! For UNIX installations, be sure to update the file that ends in .sh and ensure that you prepend the WEBLOGIC CLASSPATH environment variable, {CLASSPATHSEP}, as shown in the preceding example. Failure to do so will result in login failure when accessing the PeopleSoft system.

- Specific Domain: Update the file domain_path/bin/setDomainEnv.sh and prepend the preceding to the PRE_CLASSPATH environment variable.

4. Restart the Oracle WebLogic Server and your domain for the changes to take effect.

Task 20-4-3: Adding the PeopleSoft Authentication Provider to the Active Security Realm

To add the PeopleSoft Authentication Provider to the active Security Realm:

1. Log in to the Oracle WebLogic Server Administration Console.

- a. In the browser instance, enter the location of the local host to start the Administration Console.

For example: `http://localhost:7001/console`.

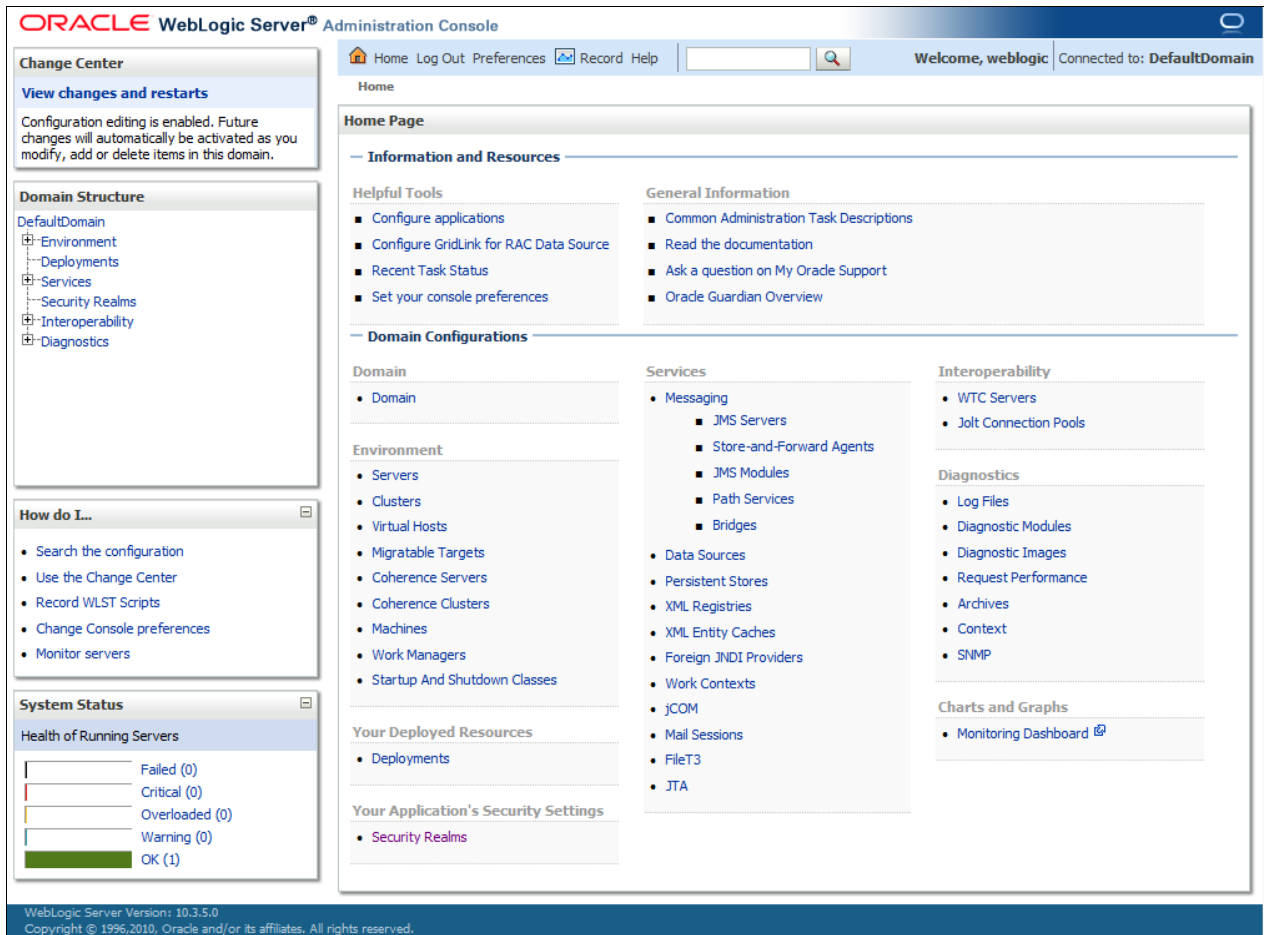
The Oracle WebLogic Server 11g Administration Console - Welcome and login page appears, as shown in the following example:



Oracle WebLogic Server Administration Console: Welcome and login page

- b. On the Welcome and login page, enter your user name and password and click login.

The Oracle WebLogic Server Administration Console - Home page appears, as shown in the following example:



Oracle WebLogic Server Administration Console: Home page

- On the Home page, click the Security Realms link under the section Your Application's Security Settings.

The Oracle WebLogic Server Administration Console - Summary of Security Realms page appears, as shown in the following example:

Home > Summary of Security Realms

Summary of Security Realms

A security realm is a container for the mechanisms--including users, groups, security roles, security policies, and security providers--that are used to protect WebLogic resources. You can have multiple security realms in a WebLogic Server domain, but only one can be set as the default (active) realm.

This Security Realms page lists each security realm that has been configured in this WebLogic Server domain. Click the name of the realm to explore and configure that realm.

[Customize this table](#)

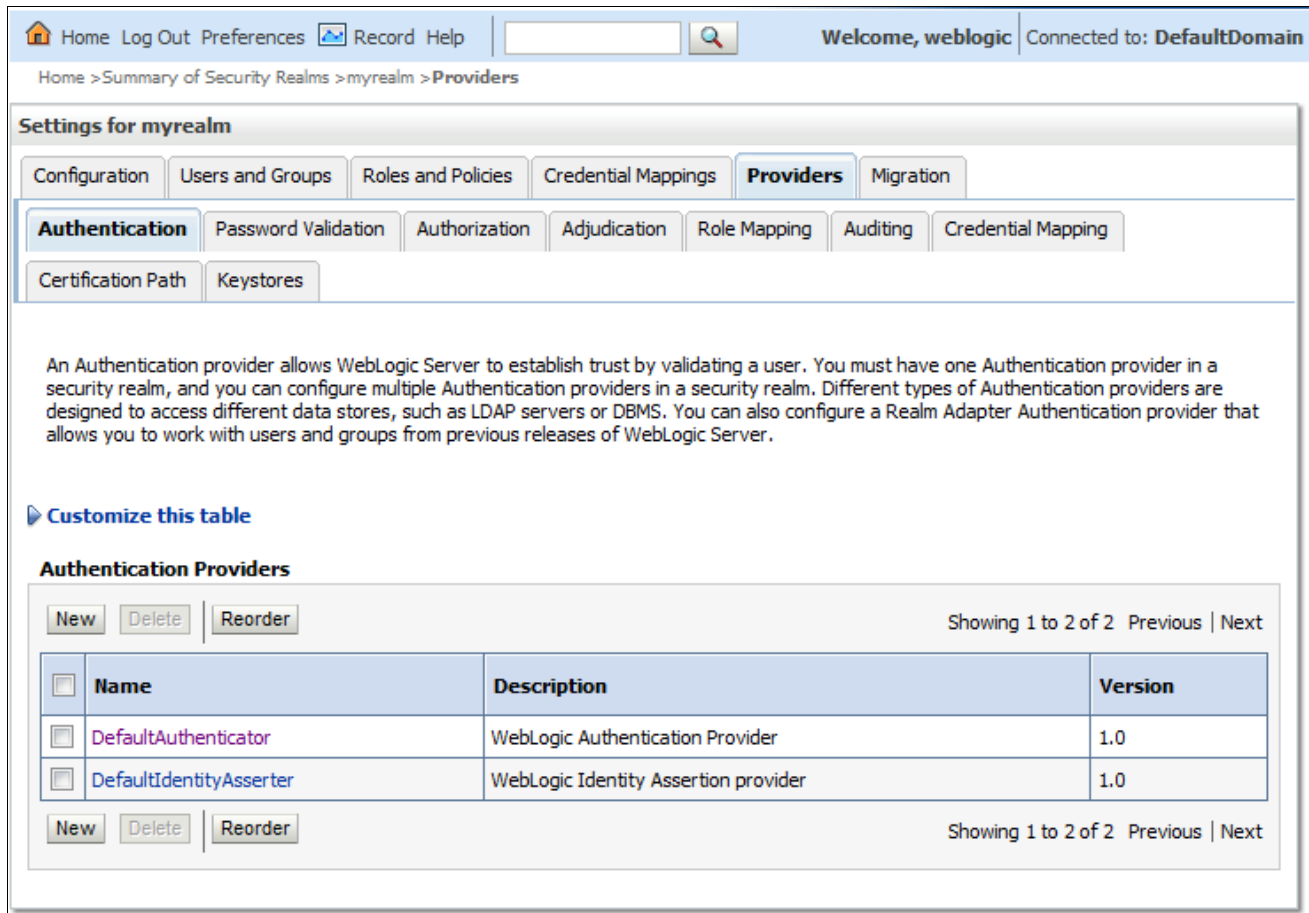
Realms (Filtered - More Columns Exist)

Name	Default Realm
myrealm	true

Oracle WebLogic Server Administration Console: Summary of Security Realms page

- On the Summary of Security Realms page, click the myrealm link to open the default security realm.

The Oracle WebLogic Server Administration Console - Authentication Providers page appears, as shown in the following example:



Oracle WebLogic Server Administration Console: Settings for myrealm page

- On the Authentication Providers page, select the Providers tab to access the Providers page and options.

5. On the Providers page, select the Authentication tab and then click the New button in the Authentication Providers table.

The Oracle WebLogic Server Administration Console - Create a New Authentication Provider page appears, as shown in the following example:

Oracle WebLogic Server Administration Console: Create a New Authentication Provider page

6. On the Create a New Authentication Provider page, do the following:
 - a. In the Name field, enter a name for the PeopleSoft Provider.
For example: *PSFT Provider*.
This name is for identification purposes only and does not need to match any specific value.
 - b. In the Type field, select *SimplePSFTAuthenticator* from the drop-down list box.
If *SimplePSFTAuthenticator* is not available for selection, return to the first step and verify that the file *wIPSFTSecurityProviders.jar* is in the correct subdirectory.

- c. Click OK.

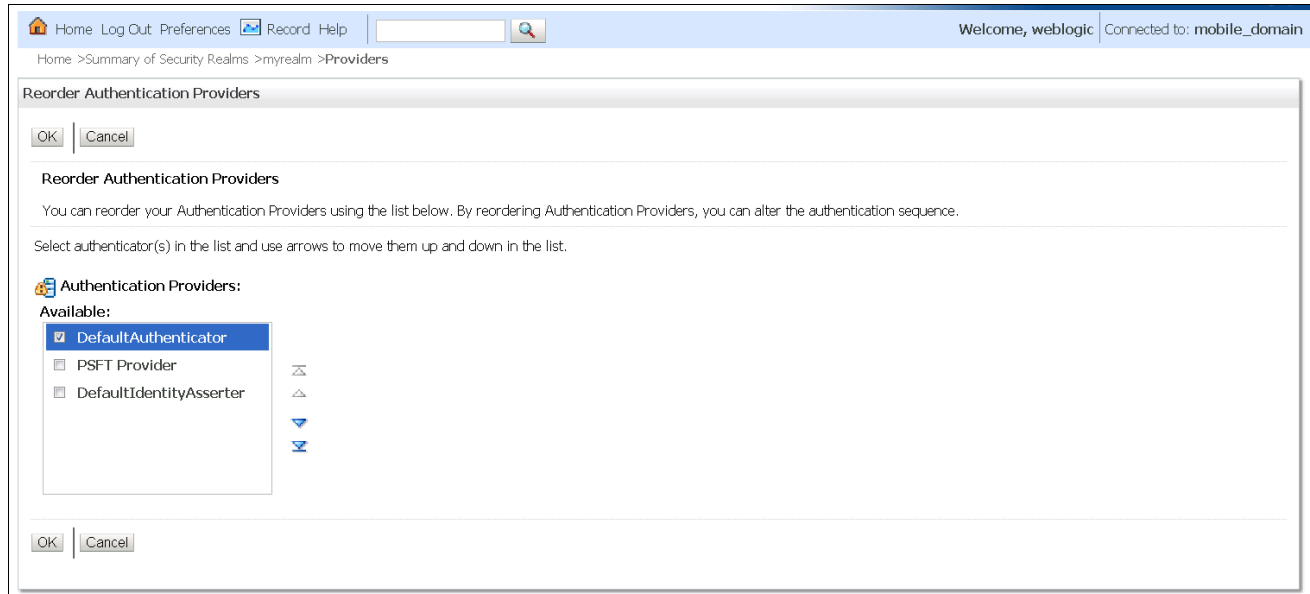
The system returns you to the Authentication Providers page.

Alternatively, you can click the Providers link in the navigation at the top of the screen.

<input type="checkbox"/>	Name	Description	Version
<input type="checkbox"/>	DefaultAuthenticator	WebLogic Authentication Provider	1.0
<input type="checkbox"/>	DefaultIdentityAsserter	WebLogic Identity Assertion provider	1.0
<input type="checkbox"/>	PSFT Provider	WebLogic Simple PSFT Authentication Provider	1.0

Oracle WebLogic Server Administration Console: Authentication Providers page displaying the newly created PSFT Provider

7. On the Authentication Providers page, click the Reorder button to access the Reorder Authentication Providers page, as shown in the following example:

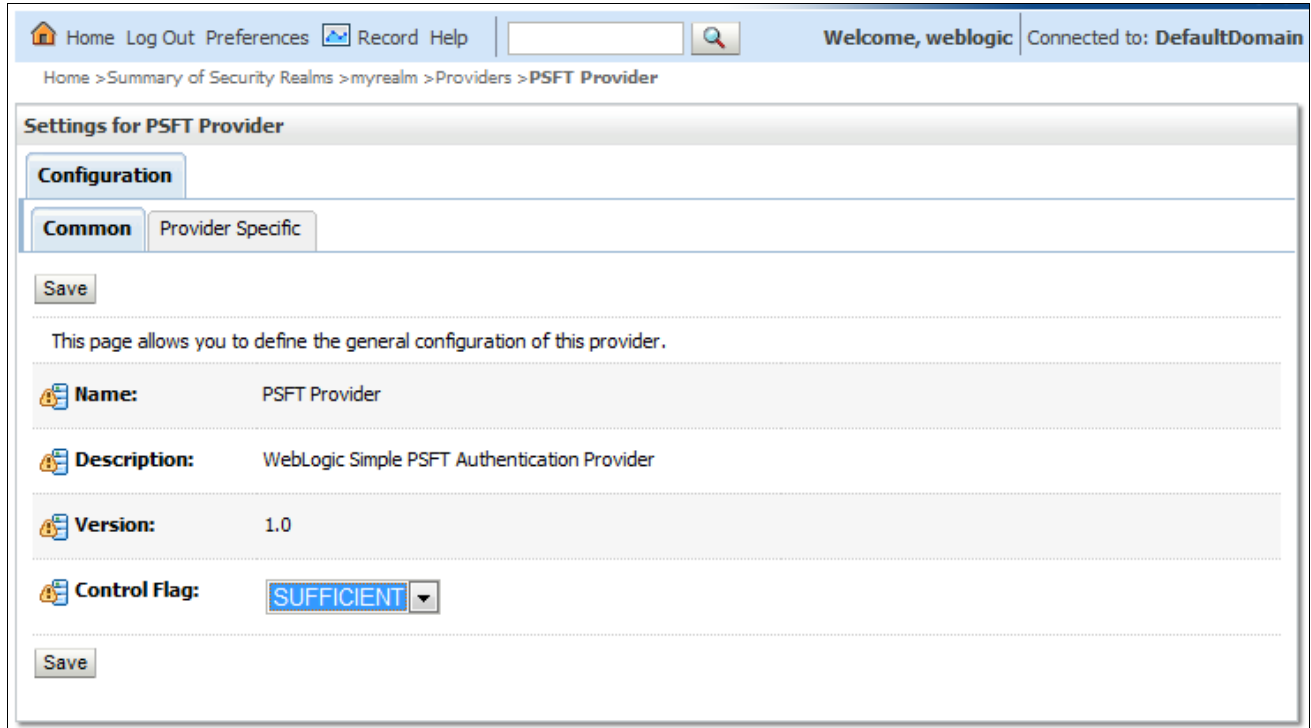


Oracle WebLogic Server Administration Console: Reorder Authentication Providers page

8. On the Reorder Authentication Providers page, do the following:
 - a. Select the DefaultAuthenticator check box and use the arrows to move the DefaultAuthenticator to the top of the list.
 - b. After the DefaultAuthenticator reaches the top of the list, click OK to save the order.

- On the Authentication Providers page, click the link for the PSFT provider that you just added (for example PSFT Provider) to access the properties for that provider.

The Oracle WebLogic Server Administration Console - Settings for PSFT Provider page appears, as shown in the following example:



Oracle WebLogic Server Administration Console: Settings for PSFT Provider page

- On the Settings for PSFT Provider - Configuration: Common page, select *SUFFICIENT* from the Control Flag drop-down list box for the PeopleSoft Provider, and then click Save.

This action specifies that a logon of true from the PSFT Provider is enough authentication to allow an application to run on the server.

11. Select the Provider Specific tab to access and configure the Provider Specific settings for the PSFT Authentication Provider.

The Oracle WebLogic Server Administration Console - Settings for PSFT Provider: Provider Specific page appears, as shown in the following example:

Oracle WebLogic Server Administration Console - Settings for PSFT Provider: Provider Specific page

12. On the Settings for PSFT Provider - Provider Specific page, do the following:

- Select the Show Login Messages In Log check box to help debug the login issues. It will print the connection type and the PeopleSoft Application Server information in the log file.
- In the People Soft Domain Password field, enter the App server domain password that was specified in PeopleSoft gateway properties.
- In the People Soft App Server field, enter the machine name and port number (the jolt port number) for your PeopleSoft Application Server.
- If your application servers are set up for *failover*, you can enter more than one application server and port number delimited by a semicolon.

Important! Your application server *must* be the same PeopleSoft PeopleTools version as the psjoa.jar file that you previously copied to your web server.

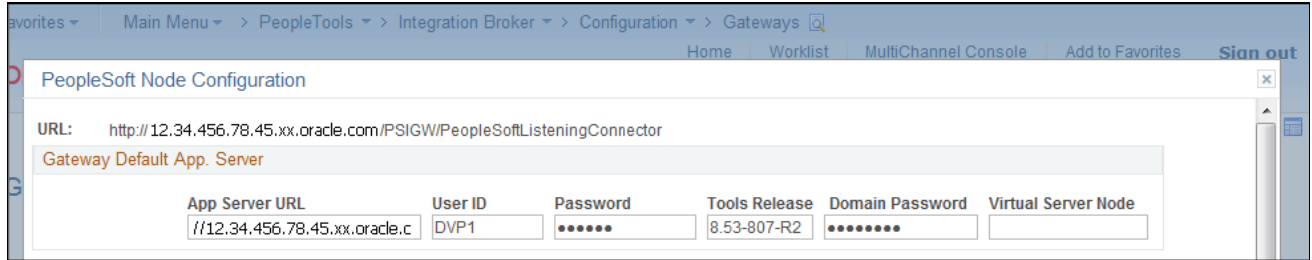
See the section Copying the PeopleSoft psjoa.jar File earlier in this chapter.

- In PeopleTools Base Version, enter the major PeopleSoft PeopleTools release version number, for example, 8.53 or 8.54.
- If you are unsure of your application server and port number, you can find that information in the

integration.properties file under the Jolt Connect section or online on the Advanced Gateway Settings page for the Gateway Default App. Server.

13. Click Save.

The following example shows where you can locate your application server and port number on the Advanced Gateway Settings page for the Gateway Default App. Server:



PeopleSoft Node Configuration page

14. Click the Providers link in the navigation at the top of the screen to return to the Authentication Providers page.

15. On the Authentication Providers page, click the Default Authenticator link to access and configure the settings for the Default Authenticator.

The Oracle WebLogic Server Administration Console - Settings for DefaultAuthenticator page appears, as shown in the following example:

Home Log Out Preferences Record Help Welcome, weblogic Connected to: DefaultDomain

Home > Summary of Security Realms > myrealm > Providers > PSFT Provider > Providers > DefaultAuthenticator

Messages

- ✔ Settings updated successfully.
- ✔ All changes have been activated. However 1 items must be restarted for the changes to take effect.

Settings for DefaultAuthenticator

Configuration Performance Migration

Common Provider Specific

Save

This page displays basic information about this WebLogic Authentication provider. You can also use this page to set the JAAS Control Flag to control how this provider is used in the login sequence.

Name:	DefaultAuthenticator	The name of this WebLogic Authentication provider. More Info...
Description:	WebLogic Authentication Provider	A short description of the Authentication provider. More Info...
Version:	1.0	The version number of the Authentication provider. More Info...
Control Flag:	SUFFICIENT	Returns how the login sequence uses the Authentication provider. More Info...

Save

Oracle WebLogic Server Administration Console: Settings for DefaultAuthenticator page

16. On the Settings for DefaultAuthenticator - Configuration: Common page, select *SUFFICIENT* from the Control Flag drop-down list box for the Default Provider, and then click Save.

This selection specifies that a logon of true from the Default Provider is enough authentication to allow an application to run on the server. The Default Authenticator is set to *REQUIRED*. If you do not change this default setting, applications will not run unless the Default Authenticator validates the session.

17. Click the myrealm link in the navigation at the top of the screen to return to the myRealm page.

- On the Settings for the myRealm page, select the Providers tab and then select the Password Validation tab, as shown in the following example:

The screenshot shows the Oracle WebLogic Server Administration Console interface. At the top, there is a navigation bar with links for Home, Log Out, Preferences, Record, and Help. The user is logged in as 'weblogic' and is connected to 'DefaultDomain'. The breadcrumb trail indicates the current location: Home > Summary of Security Realms > myrealm > Providers > PSFT Provider > Providers > DefaultAuthenticator > Providers.

The main content area is titled 'Settings for myrealm' and contains several tabs: Configuration, Users and Groups, Roles and Policies, Credential Mappings, Providers (selected), and Migration. Under the 'Providers' tab, there are sub-tabs: Authentication, Password Validation (selected), Authorization, Adjudication, Role Mapping, Auditing, and Credential Mapping. Below these are 'Certification Path' and 'Keystores' tabs.

A descriptive paragraph explains the Password Validation provider: 'The Password Validation provider manages and enforces a set of configurable password composition rules. When configured in a security realm, the Password Validation provider is automatically invoked by a supported authentication provider whenever a password is created or updated for a user in the realm. The Password Validation provider then performs a check to determine whether the password meets the criteria established by the composition rules, and the password is accepted or rejected as appropriate.'

Below the text is a 'Customize this table' link. The main section is titled 'Password Validation Providers' and includes a table with the following data:

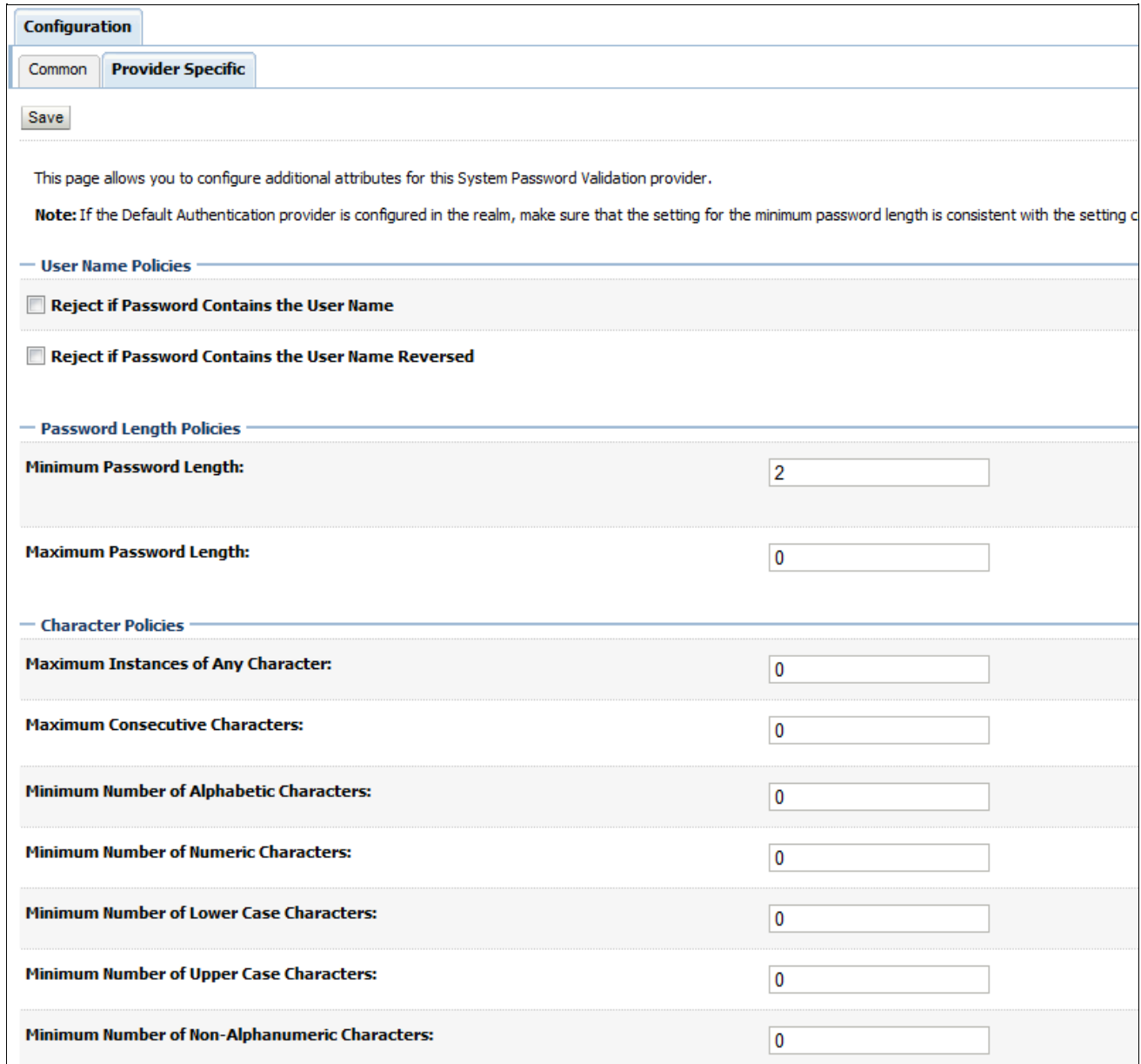
Name	Description	Version
SystemPasswordValidator	Password composition checks	1.0

The table is controlled by 'New', 'Delete', and 'Reorder' buttons. The status 'Showing 1 to 1 of 1' and 'Previous | Next' navigation links are present above and below the table.

Oracle WebLogic Server Administration Console: Settings for myrealm page

19. On the Settings for myrealm - Password Validation page, click the SystemPasswordValidator link to access the properties for that validator.

The Oracle WebLogic Server Administration Console - Settings for SystemPasswordValidator page appears, as shown in the following example:



Configuration

Common **Provider Specific**

Save

This page allows you to configure additional attributes for this System Password Validation provider.

Note: If the Default Authentication provider is configured in the realm, make sure that the setting for the minimum password length is consistent with the setting c

User Name Policies

Reject if Password Contains the User Name

Reject if Password Contains the User Name Reversed

Password Length Policies

Minimum Password Length:

Maximum Password Length:

Character Policies

Maximum Instances of Any Character:

Maximum Consecutive Characters:

Minimum Number of Alphabetic Characters:

Minimum Number of Numeric Characters:

Minimum Number of Lower Case Characters:

Minimum Number of Upper Case Characters:

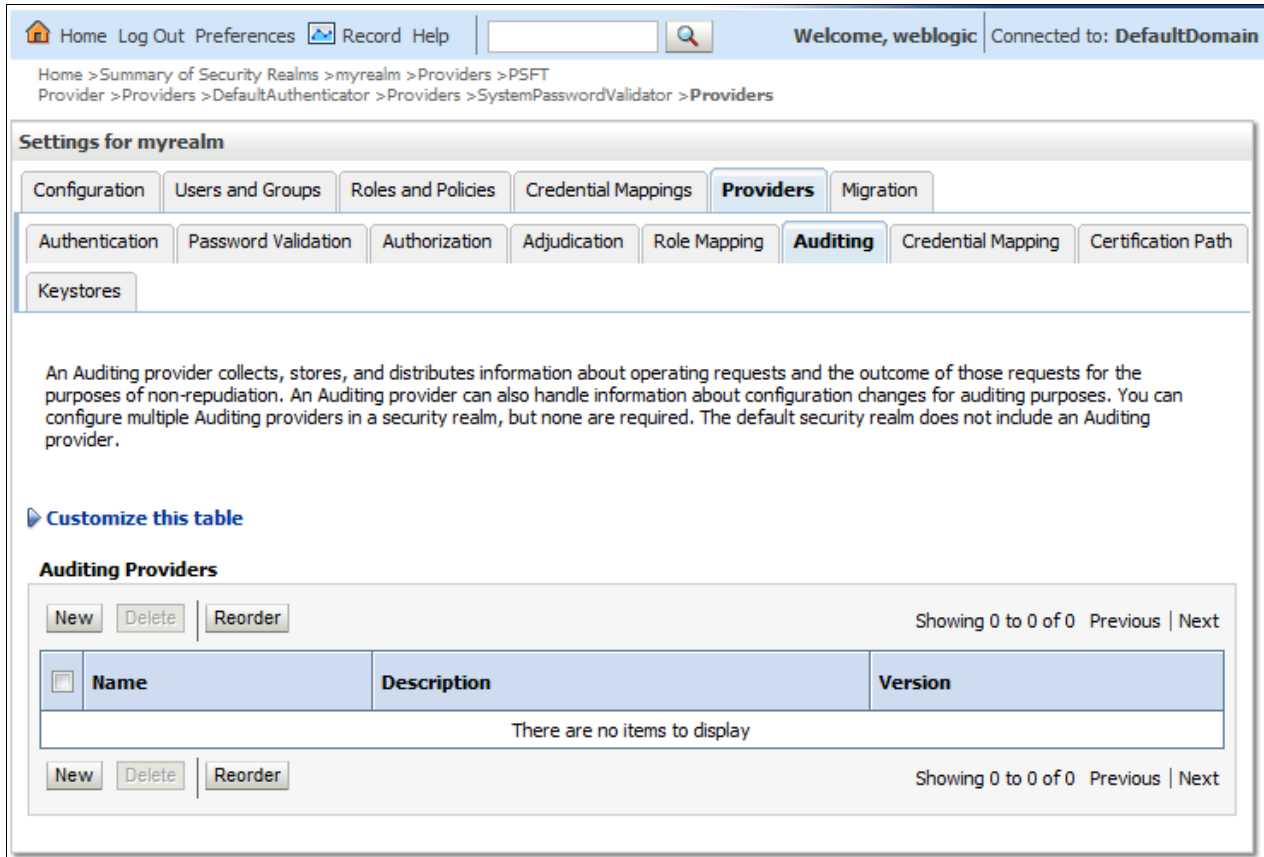
Minimum Number of Non-Alphanumeric Characters:

Oracle WebLogic Server Administration Console: Settings for SystemPasswordValidator page

20. On the Settings for SystemPasswordValidator page, select the Provider Specific tab and modify the properties as follows:
- In the Minimum Password Length field, enter a value of 2.
 - In the Minimum Number of Non-Alphabetic Characters field, enter a value of 0.
 - Click Save.
21. (Optional) To verify that the Jolt Connection is set up and working properly, add a Security Audit Log by performing the following steps.

Note. Setting up a Security Audit Log is *optional* and not required to run PeopleSoft Mobile Inventory Management; however, it could be useful in tracking down connection errors, particularly after PeopleSoft PeopleTools upgrades.

- a. From the Provider's page, select the Auditing tab to access the Auditing Providers page, as shown in the following example:



Oracle WebLogic Server Administration Console: Auditing Providers page

- b. On the Auditing Providers page, click the New button to access the Create a New Auditing Provider setup page, as shown in the following example:

Home Log Out Preferences Record Help Welcome, weblogic Connected to: DefaultDomain

Home > Summary of Security Realms > myrealm > Providers > PSFT Provider > Providers > DefaultAuthenticator > Providers > SystemPasswordValidator > Providers

Create a New Auditing Provider

OK Cancel

Create a new Auditing Provider

The following properties will be used to identify your new Auditing Provider.
* Indicates required fields

The name of the Auditing Provider.

* **Name:**

This is the type of auditing provider you wish to create.

Type:

OK Cancel

Create a New Auditing Provider page

- c. On the Create a New Auditing Provider page, in the Name field enter *Default Auditor*, and in the Type field select *Default Auditor* from the drop-down list box.
- d. Click OK.

- e. On the Provider Specific page for the Default Auditor that you just created, in the Severity field select *Failure* from the drop-down list box, as shown in the following example:

The screenshot shows the 'Settings for DefaultAuditor' page in the Oracle WebLogic console. The page is titled 'Settings for DefaultAuditor' and has a 'Configuration' tab selected. Under 'Configuration', the 'Provider Specific' sub-tab is active. A 'Save' button is visible at the top left of the configuration area. Below the button, a message states: 'This page allows you to configure provider specific attributes for this WebLogic Auditing provider.' The main configuration area is divided into three sections:

- Active Context Handler Entries:** This section contains two lists: 'Available' and 'Chosen'. The 'Available' list contains six entries, all of which are 'com.bea.contexteleme...'. The 'Chosen' list is currently empty. There are arrow buttons between the lists to move items from available to chosen and vice versa.
- Rotation Minutes:** This field is set to '1440'. A description to the right states: 'Specifies how many minutes to wait before creating a new DefaultAuditRecorder.log file. At the specified time, the audit file is closed and a new one is created. More Info...'
- Severity:** This dropdown menu is set to 'FAILURE'. A description to the right states: 'The severity level at which auditing is initiated. More Info...'

Settings for DefaultAuditor page

Selecting a severity level of *Failure* logs any failure to connect from the Authentication Provider to the PeopleSoft Application Server using the Jolt Connection.

- f. Click Save.
22. Log out and cycle the Oracle WebLogic Server instance.
This enables the PSFT Authentication Provider to install properly.
23. Restart the Oracle WebLogic Server instance.

Task 20-5: Setting Up the PeopleSoft Database for PeopleSoft Mobile Inventory Management

This section discusses:

- Understanding the PeopleSoft Database Setup for PeopleSoft Mobile Inventory Management
- Setting Up Integration with the PeopleSoft System
- Reviewing the Setup of PeopleSoft Mobile Inventory Management in PeopleSoft Integration Broker

- Granting Security to PeopleSoft Mobile Inventory Management Objects
- Rebooting the PeopleSoft Application Server
- Verifying PeopleSoft Integration Broker is Web Service Enabled
- Setting Installation Options

Understanding the PeopleSoft Database Setup for PeopleSoft Mobile Inventory Management

To use PeopleSoft Mobile Inventory Management, you must complete the setup steps within your PeopleSoft environment. These steps customize PeopleSoft Mobile Inventory Management to your specific needs by setting up servers; identifying users, default values, and mobile screen settings; and activating the integration points.

For more information on setting up PeopleSoft application servers and web services, refer to the following product documentation:

See *PeopleTools: System and Server Administration*.

See the PeopleTools installation guide for your database platform and current PeopleTools release.

See *PeopleSoft FSCM: Mobile Inventory Management*.

Task 20-5-1: Setting Up Integration with the PeopleSoft System

This section discusses:

- Configuring the PeopleSoft Integration Broker for the Gateway
- Configuring the PeopleSoft Integration Broker for Web Services
- Configuring the PeopleSoft Integration Broker Domain
- Activating GETWSDL Service Operation Routing
- Configuring the ANONYMOUS Node With a Valid User

Configuring the PeopleSoft Integration Broker for the Gateway

You must update the PeopleSoft Integration Broker Gateway to recognize your PeopleSoft application server.

To configure the PeopleSoft Integration Broker for the Gateway:

1. Log in to your PeopleSoft application.

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

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

Gateways

Gateway ID LOCAL

Local Gateway Load Balancer

URL

Gateway Setup Properties

*Connector ID	Description	*Connector Class Name	Properties	+	-
1 AS2TARGET		AS2TargetConnector	Properties	+	-
2 EXAMPLETARGETCONN		ExampleTargetConnector	Properties	+	-
3 FILEOUTPUT		SimpleFileTargetConnector	Properties	+	-
4 FTPTARGET		FTPTargetConnector	Properties	+	-
5 GETMAILTARGET		GetMailTargetConnector	Properties	+	-
6 HTTPTARGET		HttpTargetConnector	Properties	+	-
7 JMSTARGET		JMSTargetConnector	Properties	+	-
8 PSFT81TARGET		ApplicationMessagingTargetConnector	Properties	+	-
9 PSFTTARGET		PeopleSoftTargetConnector	Properties	+	-
10 RIDCTARGET		RIDCTargetConnector	Properties	+	-
11 SFTPTARGET		SFTPTargetConnector	Properties	+	-
12 SMTPTARGET		SMTPTargetConnector	Properties	+	-

Gateways page

3. Complete the URL by entering a valid gateway and webserver name and port.
For example: `http://machineNamePort/PSIGW/PeopleSoftListeningConnector`.
4. Click Save.
5. Click OK when the following message appears:
"The Gateway URL has changed. Connector information will be refreshed."
6. Click the Ping Gateway button.
The PeopleSoft Integration Gateway page should appear in a new browser window. Close the window.
7. Click the Advanced Gateway Setup link to open the Gateways page.
The Gateways page appears.
8. On the Gateways page, click the Gateway Setup Properties link.
The system prompts you to enter a user ID and password.

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

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

PeopleSoft Node Configuration

URL: http://rtdc78288qaemt.us.oracle.com:6400/PSIGW/PeopleSoftListeningConnector

Gateway Default App. Server

App Server URL	User ID	Password	Tools Release	Domain Password	Virtual Server Node
//<machinename>:<port>	VP1	.....	8.54	.....

PeopleSoft Nodes

Personalize | Find | View All | First 1-10 of 81 Last

Node Name	App Server URL	User ID	Password	Tools Release	Domain Password	
PSFT_EP	//<machinename>:<port>	VP1	.....	8.54	.....	Ping Node + -

PeopleSoft Node Configuration page

10. On the PeopleSoft Node Configuration page, in the Gateway Default App. Server section, do the following:
- In the App Server URL field, enter your application server name and port.
 - In the User ID and Password fields, enter the user ID and password of a Super User in your system (typically *VPI/VPI*).
 - In the Tools Release field, enter the complete PeopleSoft PeopleTools version that you are running.
For example: 8.53.
11. In the PeopleSoft Nodes section, in the Node Name field, enter the local node name.
For example: *PSFT_EP*
12. Configure the remaining fields for the local node as follows:
- In the App Server URL field, enter your application server name and port.
 - In the User ID and Password fields, enter the user ID and password of a Super User in your system (typically *VPI/VPI*).
 - In the Tools Release field, enter the complete PeopleSoft PeopleTools version that you are running.
For example: 8.53
13. Click Save.
14. Click the Ping Node button on the Local Node and verify that it returns a response of Success.

The Ping Node Results page appears as follows, showing Success in the Message Text column:

Ping Node Results

Node Information

Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

Return

Ping Node Results page

Configuring the PeopleSoft Integration Broker for Web Services

To configure the PeopleSoft Integration Broker for web services:

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

The Integration Broker Service Configuration page appears:

The screenshot displays the Oracle PeopleSoft Integration Broker Service Configuration page. The breadcrumb trail at the top reads: Favorites > Main Menu > PeopleTools > Integration Broker > Configuration > Service Configuration. The Oracle logo is visible in the top left. A search bar with 'All' and 'Search' is on the top right. Below the breadcrumb, there are four tabs: Service Configuration (selected), UDDI Configuration, Restricted Services, and Exclude PSFT Auth Token. The configuration fields are as follows:

- *Service Namespace:
- *Schema Namespace:
- *Service System Status:
- Enable Multi-queue
- *WSDL Generation Alias Check:

Below the fields, there is a link: *Target Location(s) Required for Web Services [Setup Target Locations](#). At the bottom of the configuration area, it shows: Last Updated VP1 and Last Update Date/Time 12/28/2014 5:11:16PM. A Save button is located at the bottom left of the configuration area. At the very bottom, there is a breadcrumb trail: Service Configuration | UDDI Configuration | Restricted Services | Exclude PSFT Auth Token.

Service Configuration page

- On the Service Configuration page, click the Setup Target Locations link to access the Target Locations page. The Target Location page appears:

Target Locations

Web Services Target Locations

*Target Location

Example http://<machine>:<port>/PSIGW/PeopleSoftServiceListeningConnector

Alternate Example http://<machine>:<port>/PSIGW/PeopleSoftServiceListeningConnector/<defaultlocalnode>

Secure Target Location

Example https://<machine>:<port>/PSIGW/PeopleSoftServiceListeningConnector

Alternate Example https://<machine>:<port>/PSIGW/PeopleSoftServiceListeningConnector/<defaultlocalnode>

REST Target Locations

Target Location

Example http://<machine>:<port>/PSIGW/RETLISTENINGCONNECTOR

Alternate Example http://<machine>:<port>/PSIGW/RETLISTENINGCONNECTOR/<defaultlocalnode>

Secure Target Location

Example https://<machine>:<port>/PSIGW/RETLISTENINGCONNECTOR

Alternate Example https://<machine>:<port>/PSIGW/RETLISTENINGCONNECTOR/<defaultlocalnode>

OK Cancel

Target Locations page

- On the Target Locations page, complete the Target Location URL by replacing the *<machine>:<port>* tokens with your Gateway name and port. In addition, replace the *<defaultlocalnode>* with the default local node.

Then edit the following:

- Enter the machine name where your PeopleSoft PeopleTools installation resides.
- Enter the HTTP port number for the web server.
- Append the default local node to the end (PSFT_EP is the default value).

The following example uses ui-sun10, 8000 and PSFT_EP:

```
http://ui-sun10:8000/PSIGW/PeopleSoftServiceListeningConnector/PSFT_EP
```

You will use this URL and port during the deployment step of PeopleSoft Mobile Inventory Management.

- If the system prompts you to update UDDI servers, click Yes.

Configuring the PeopleSoft Integration Broker Domain

To process synchronous messages, one application server domain must be active. When you configure the application server, ensure that the Pub/Sub feature is set to *On*.

Before you can use the Pub/Sub system, you must activate the domain on which a Pub/Sub server resides.

To activate a domain:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status.
The Domain Status page appears.
2. In the Domains group box, do the following:
 - a. Locate the row that lists the machine where the domain that you want to activate resides.
 - b. In the Domain Status field, select *Active* from the drop-down list box.
3. Click the Update button.

Domain Status page

Activating GETWSDL Service Operation Routing

To activate the GETWSDL service operation routing:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
The Service Operations - Search page appears.
2. On the Service Operations - Search page, in the Service Operation field, enter *GETWSDL*.

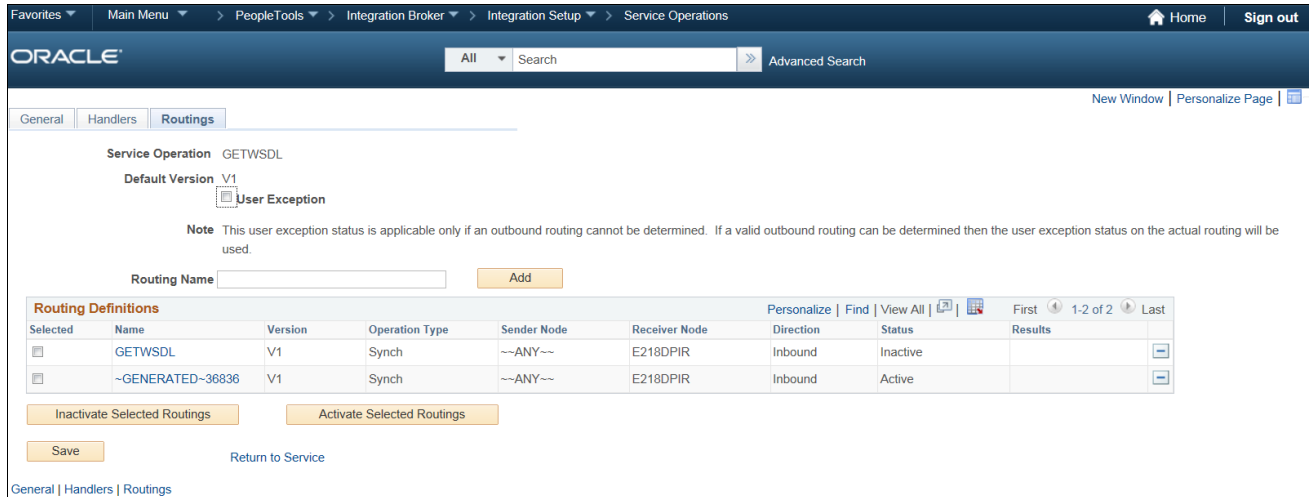
- In the search results grid, click the GETWSDL link to access the GETWSDL service operation of the IB_UTILITY service, as shown in the following example:

The screenshot displays the Oracle Service Operations - Search interface. At the top, there is a navigation breadcrumb: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Service Operations. Below this is the Oracle logo and a search bar with 'All' selected and a search input field. The main content area is titled 'Service Operations - Search' and contains a 'Search Criteria' section with the following fields: Service (empty), Service Operation (GETWSDL), Operation Type (dropdown menu), and Operation Alias (empty). A 'Search' button is located below these fields. Below the search criteria is a table with the following data:

Service	Service Operation	Operation Type	Operation Alias
IB_UTILITY	GETWSDL	Synchronous	

Service Operations - Search page

- On the Service Operations General page for GETWSDL, select the Routings tab to access the Routings page for GETWSDL, as shown in the following example:



Service Operations page: Routings tab for GETWSDL

- On the Routings page, in the Routing Definitions group box, select the check box next to the required Sender Node to activate the Inbound routing (if it does not already show a status of Active).

Important! Only one routing should be active, if more than one is present. In the preceding example of the Service Operations - Routings page, you can see GENERATED 36836 and GENERATED 74415417 in the Routing Definitions Name column. This view makes GENERATED 36836 and GENERATED 74415417 look different, when in fact they are duplicates and the same routing as service operation. Therefore, be careful when you select one to activate and make sure that you do not mistakenly activate both. Otherwise, your Integration Broker test will fail because only one routing can be active.

- Click the Activate Selected Routing button.
- Click Save.

Configuring the ANONYMOUS Node With a Valid User

You must provide a valid PeopleSoft user for the ANONYMOUS node.

To configure the ANONYMOUS node with a valid user:

- Log in to your PeopleSoft application.

2. Select PeopleTools, Integration Broker, Integration Setup, Nodes and then search for and select ANONYMOUS.

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

The screenshot shows the Oracle Node Definitions page for the ANONYMOUS node. The breadcrumb trail is: Favorites > Main Menu > PeopleTools > Integration Broker > Integration Setup > Nodes. The page has a search bar with 'All' and a search input field. Below the breadcrumb is a navigation bar with tabs: Node Definitions (selected), Connectors, Portal, WS Security, and Routings. The main content area contains the following fields and options:

- Node Name:** ANONYMOUS (with a Copy Node button)
- *Description:** Used internally by IB system. (with a Rename Node button)
- *Node Type:** External (dropdown menu) with checkboxes for:
 - Default Local Node
 - Local Node
 - Active Node
 - Non-Repudiation
 - Segment Aware
 (with a Delete Node button)
- *Authentication Option:** None (dropdown menu)
- *Default User ID:** VP1 (with a lookup icon)
- WSIL URL:** (text input)
- Hub Node:** (text input with a lookup icon)
- Master Node:** (text input with a lookup icon)
- Company ID:** (text input)
- IB Throttle Threshold:** (text input)
- Image Name:** (text input with a lookup icon)
- Codeset Group Name:** (text input with a lookup icon)
- External User ID:** (text input)
- External Password:** (text input)
- External Version:** (text input)

At the bottom of the form area, there are links for [Contact/Notes](#) and [Properties](#), a Save button, and a Return to Search button. A breadcrumb trail at the very bottom reads: [Node Definitions](#) | [Connectors](#) | [Portal](#) | [WS Security](#) | [Routings](#).

Node Definitions page

3. On the Node Definitions page, in the Default User ID field, click the lookup icon to select a valid PeopleSoft user.

Note. This does not need to be a Super User ID.

4. Click Save.

Task 20-5-2: Reviewing the Setup of PeopleSoft Mobile Inventory Management in PeopleSoft Integration Broker

The integration between PeopleSoft and the mobile device involves the use of service operations within the PeopleSoft Integration Broker. The following table lists the services that PeopleSoft Mobile Inventory Management uses, along with their corresponding description, task flow, and component interface:

Service	Description	Used by Task Flows	Component Interface
MIN_ADJUSTMENT	Adjustments for Mobile	Adjustments	ADJUSTMENT_INV
MIN_ALT_TYPES_GET	Alternate Item Type for Mobile	All	N/A
MIN_BIN_TRANSFER	Bin to Bin Transfer for Mobile	Bin to Bin Transfer	N/A
MIN_CART_COUNT_GET	Get Par Locations for Mobile	Par Count	CART_COUNT_INV
MIN_CART_COUNT_GET	Get Par Locations for Mobile	Par Count Ad Hoc	CART_COUNT_INV
MIN_CART_COUNT_SAVE	Save Par Locations for Mobile	Par Count	CART_COUNT_INV
MIN_CART_COUNT_SAVE	Save Par Locations for Mobile	Par Count Ad Hoc	CART_COUNT_INV
MIN_COUNTING_EVENT_VALIDATE	Inventory Counting Event Validation	Guided Count	N/A
MIN_COUNTING_EVENT_VALIDATE	Inventory Counting Event Validation	Count By Item	N/A
MIN_COUNTING_EVENT_VALIDATE	Inventory Counting Event Validation	Count By Location	N/A
MIN_COUNTING_EVENT_VALIDATE	Inventory Counting Event Validation	Manual Count	N/A
MIN_COUNTING_EVENT_GET	Inventory Counting Event Get	Guided Count	N/A
MIN_COUNTING_EVENT_GET	Inventory Counting Event Get	Count By Item	N/A
MIN_COUNTING_EVENT_GET	Inventory Counting Event Get	Count By Location	N/A
MIN_COUNTING_EVENT_GET	Inventory Counting Event Get	Manual Count	N/A

Service	Description	Used by Task Flows	Component Interface
MIN_COUNTING_EVENT_SET	Inventory Counting Event Set	Guided Count	COUNT_INV_CI
MIN_COUNTING_EVENT_SET	Inventory Counting Event Set	Count By Item	COUNT_INV_CI
MIN_COUNTING_EVENT_SET	Inventory Counting Event Set	Count By Location	COUNT_INV_CI
MIN_COUNTING_EVENT_SET	Inventory Counting Event Set	Manual Count	COUNT_INV_INF
MIN_EXPRESS_ISSUE	Express Issue for Mobile	Express Issue	EXPRESS_ISSUE_INV_CI
MIN_EXPRESS_ISSUE_VALIDATE	Express Issue for Mobile Validation	Express Issue	N/A
MIN_FUL_INQ_INV_DTL	Fulfillment Inquiry for detail information	Fulfillment Inquiry	MIN_FUL_INQ_INV_CI
MIN_FUL_INQ_INV_HDR	Fulfillment Inquiry for header information	Fulfillment Inquiry	MIN_FUL_INQ_INV_CI
MIN_ITEM_STK_INQ	Item Stock Inquiry for Mobile	Item Stock Inquiry	PUTAWAY_INQ_INV
MIN_LOOKUP_GENERIC_GET	Generic Lookup for Mobile	All	N/A
MIN_MENU	Mobile Menu Service	All	N/A
MIN_NPRCPT_SAVE	Mobile Non-PO Receipt Service	Receiving	MIN_NPO_RECV_CI
MIN_NPRCPT_SAVE	Mobile Non-PO Receipt Service	Receiving Ad Hoc	MIN_NPO_RECV_CI
MIN_OPTIONS	Mobile Inventory Options	All	N/A
MIN_PICK_FDB_SRCH_HDR	Picking Feedback Search	Picking Feedback	MIN_DMD_PICK_INV
MIN_PICK_FDB_SRC2_HDR	Picking Feedback Search	Picking Feedback	MIN_DMD_PICK_INV
MIN_PICK_SAVE	Picking Feedback Save	Picking Feedback	MIN_DMD_PICK_INV
MIN_PROMPT_EDIT	Prompt table Edit Service	Adjustments	N/A

Service	Description	Used by Task Flows	Component Interface
MIN_PROMPT_EDIT	Prompt table Edit Service	Bin to Bin Transfer	N/A
MIN_PROMPT_EDIT	Prompt table Edit Service	Receiving PO	N/A
MIN_PROMPT_EDIT	Prompt table Edit Service	Receiving Ad Hoc	N/A
MIN_RCPT_CNTR_GET	Mobile Receiving Get	Receiving PO	PO_RECEIPT_CI
MIN_RCPT_CNTR_SAVE	Mobile Receiving Save	Receiving PO	MIN_PO_RECV_CI
MIN_RECV_DELIVERY	Mobile Delivery Get	Delivery	RECV_DELIVERY_CI
MIN_RECV_DELIVERY_SAVE	Mobile Delivery Save	Delivery	RECV_DELIVERY_CI
MIN_STCK_FEEDBK_FIND	Stockroom Feedback Find	Stockroom Feedback	PUTAWAY_FEEDBK_MBL
MIN_STCK_FEEDBK_GET	Stockroom Feedback Get	Stockroom Feedback	PUTAWAY_FEEDBK_MBL
MIN_STCK_FEEDBK_SAVE	Stockroom Feedback Save	Stockroom Feedback	PUTAWAY_FEEDBK_MBL

Note. Oracle delivers fully configured service operations for PeopleSoft Mobile Inventory Management. Therefore, the following steps are required only if any service operations are not active.

To activate the synchronous service operations for PeopleSoft Mobile Inventory Management, complete the following steps in the PeopleSoft Integration Broker for each service in the preceding table:

1. Activate the service operation:

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

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

Service Operations page - General tab

- b. On the Service Operations - General page, in the Default Service Operation Version group box, select the Active check box for the applicable service operation version.

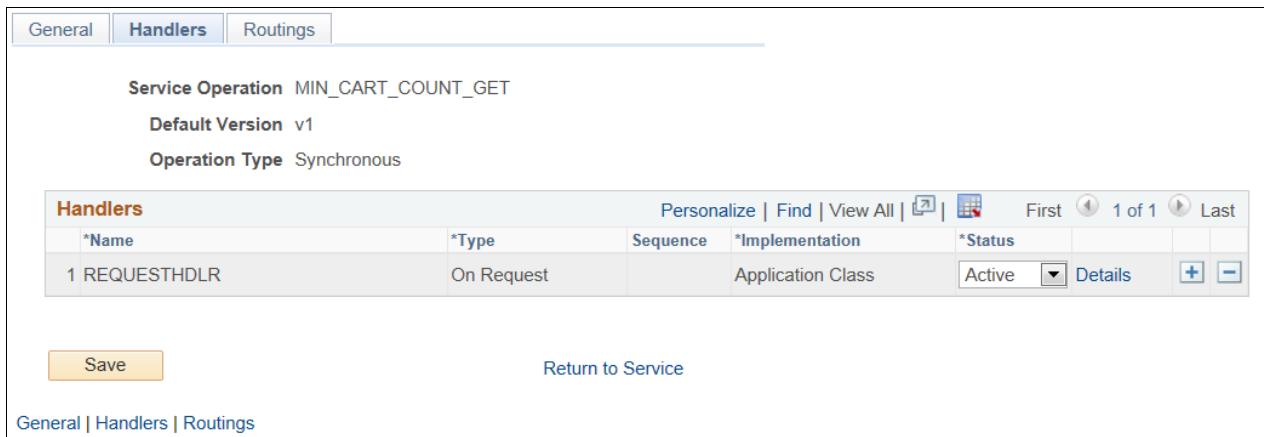
For example: *v1*.

- c. If the version that you want is not the default version for the service operation, you must also activate the default version.

- 2. Activate the service operation handlers:

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

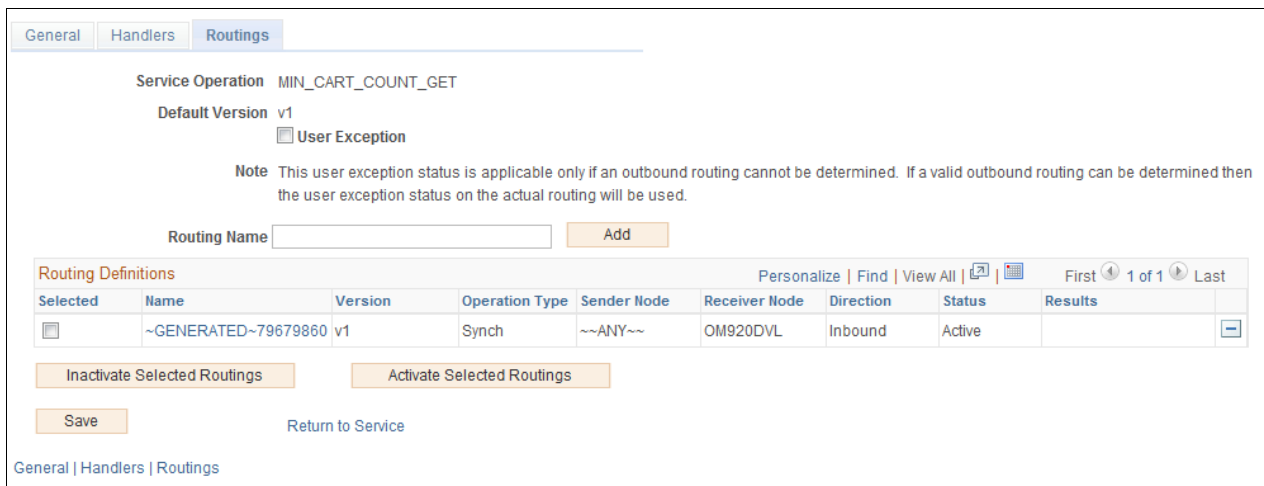
The Service Operations - Handlers page appears, as shown in the following example:



Service Operations page - Handlers tab

- b. On the Service Operations - Handlers page, in the Handlers group box, select *Active* from the Status drop-down list box for all handlers that the system requires.
 - c. For inbound synchronous service operations, activate the OnRequest handler.
3. Activate the service operation routings:
- a. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.

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



Service Operations page - Routings tab

- b. On the Service Operations - Routings page, activate a routing definition for each node that sends or receives data.
To activate a routing, select the check box next to the routing definition and click the Activate Selected Routings button. You must activate at least one routing if the data is being sent in an XML format.
- c. Activate an inbound routing to receive data into PeopleSoft.

See *PeopleTools: PeopleSoft Integration Broker*.

Task 20-5-3: Granting Security to PeopleSoft Mobile Inventory Management Objects

This section discusses:

- Understanding How to Grant Security to PeopleSoft Mobile Inventory Management Objects
- Granting Security to PeopleSoft Mobile Inventory Management Objects

Understanding How to Grant Security to PeopleSoft Mobile Inventory Management Objects

Use the Portal Security Sync from PeopleSoft Pure Internet Architecture to grant security to PeopleSoft Mobile Inventory Management 9.2 objects to any custom Roles or Permission Lists that you maintain. Oracle delivers the Roles and Permission Lists that are set up to run all transactions.

Oracle delivers the following Roles and Permission Lists:

- Roles
 - MIN Administrator - Gives Administrators full access to all Mobile pages.
 - MIN User - Gives User access to Mobile pages but no Mobile setup pages.
- Permission Lists
 - EPMIN1000 - For use by MIN Administrator Role.
 - EPMIN1100 - For use by MIN User Role.

Granting Security to PeopleSoft Mobile Inventory Management Objects

To grant security to PeopleSoft Mobile Inventory Management objects:

1. Select PeopleTools, Portal, Portal Security Sync.
2. Select Run Control ID PORTAL_CSS.
If this run control ID is not already present, select the Add a new value tab and add this run control value.
3. Select the Delete invalid security check box.
4. Click Run.
5. Click OK.

Task 20-5-4: Rebooting the PeopleSoft Application Server

After you complete the PeopleSoft Mobile Inventory Management 9.2 installation, you must shut down the PeopleSoft Application Server, clear the cache, and then restart the server.

Task 20-5-5: Verifying PeopleSoft Integration Broker is Web Service Enabled

After you complete the PeopleSoft Mobile Inventory Management 9.2 installation, verify that PeopleSoft Integration Broker is configured for Web Services. Web Services Description Language (WSDL) requires Web Services to communicate between PeopleSoft and the Mobile Inventory Web Server. Details on how to configure PeopleSoft Integration Broker and Web Services are in the PeopleTools installation guide for your database platform product documentation, available on My Oracle Support.

The following example shows a quick test for the PeopleSoft Integration Broker.

If the PeopleSoft Integration Broker is configured properly, the following URL should produce output similar to the example that follows:

http://machineNamePort/PSIGW/PeopleSoftServiceListeningConnector/PSFT_EP/MIN_OPTIONS.1.wsdl

```
<?xml version="1.0" ?>
- <wsdl:definitions name="MIN_OPTIONS.1" targetNamespace="http://xmlns.oracle.com/Enterprise/FSCM/service/MIN_OPTIONS.1" xmlns:MIN_OPTIONS_REQ.V1="http://xmlns.oracle.co
xmlns:MIN_OPTIONS_RSP.V1="http://xmlns.oracle.com/Enterprise/FSCM/schema/MIN_OPTIONS_RSP.V1" xmlns:plink="http://schemas.xmlsoap.org/ws/2003/05/partner-link/" x
xmlns:tns="http://xmlns.oracle.com/Enterprise/FSCM/service/MIN_OPTIONS.1" xmlns:wsdl="http://schemas.xmlsoap.org/wsdl/" xmlns:wsp="http://schemas.xmlsoap.org/ws/2
<wsp:UsagePolicy wsdl:Required="true" />
- <plink:partnerLinkType name="MIN_OPTIONS_PartnerLinkType">
- <plink:role name="MIN_OPTIONS_Provider">
- <plink:portType name="tns:MIN_OPTIONS_PortType" />
- <plink:role />
- <plink:partnerLinkType />
- <wsdl:types>
- <xsd:schema elementFormDefault="qualified" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
- <xsd:import namespace="http://xmlns.oracle.com/Enterprise/FSCM/schema/MIN_OPTIONS_REQ.V1" schemaLocation="MIN_OPTIONS_REQ.V1.xsd" />
- <xsd:import namespace="http://xmlns.oracle.com/Enterprise/FSCM/schema/MIN_OPTIONS_RSP.V1" schemaLocation="MIN_OPTIONS_RSP.V1.xsd" />
- <xsd:schema />
- </wsdl:types>
- <wsdl:message name="MIN_OPTIONS_REQ.V1">
- <wsdl:documentation>Mobile Inventory Option Req</wsdl:documentation>
- <wsdl:part element="MIN_OPTIONS_REQ.V1:MIN_OPTIONS_REQ" name="parameter" />
- </wsdl:message>
- <wsdl:message name="MIN_OPTIONS_RSP.V1">
- <wsdl:documentation>Mobile Inventory Option Rsp</wsdl:documentation>
- <wsdl:part element="MIN_OPTIONS_RSP.V1:MIN_OPTIONS_RSP" name="parameter" />
- </wsdl:message>
- <wsdl:portType name="MIN_OPTIONS_PortType">
- <wsdl:operation name="MIN_OPTIONS">
- <wsdl:documentation>Mobile Inventory Options</wsdl:documentation>
- <wsdl:input message="tns:MIN_OPTIONS_REQ.V1" name="MIN_OPTIONS_REQ.V1" />
- <wsdl:output message="tns:MIN_OPTIONS_RSP.V1" name="MIN_OPTIONS_RSP.V1" />
- </wsdl:operation>
- </wsdl:portType>
- <wsdl:binding name="MIN_OPTIONS_Binding" type="tns:MIN_OPTIONS_PortType">
- <soap:binding style="document" transport="http://schemas.xmlsoap.org/soap/http" />
- <wsdl:operation name="MIN_OPTIONS">
- <soap:operation soapAction="MIN_OPTIONS.v1" style="document" />
- <wsp:Policy wsu:Id="UsernameTokenSecurityPolicyPasswordOptional" xmlns:wsu="http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-utility-1.0.xsd">
- <wsp:ExactlyOne>
- <wsp:All>
- <wsse:SecurityToken wsp:Usage="wsp:Required" xmlns:wsse="http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-secext-1.0.xsd">
- <wsse:TokenType>wsse:UserNameToken</wsse:TokenType>
- <Claims>
- <SubjectName MatchType="wsse:Exact" />
- <UsePassword wsp:Usage="wsp:Optional" />
- </Claims>
- </wsse:SecurityToken>
- </wsp:All>
- </wsp:ExactlyOne>
- </wsp:Policy>
- <wsdl:input name="MIN_OPTIONS_REQ.V1">
- <soap:body encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" use="literal" />
- </wsdl:input>
- <wsdl:output name="MIN_OPTIONS_RSP.V1">
- <soap:body encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" use="literal" />
- </wsdl:output>
- </wsdl:operation>
```

Example of URL output produced from properly configured PeopleSoft Integration Broker

See *PeopleTools: PeopleSoft Integration Broker*.

Task 20-5-6: Setting Installation Options

Oracle recommends that you update the PeopleSoft Mobile Inventory Management indicator on the Installation page.

To set installation options:

1. From the Main menu, select Set Up Financials/Supply Chain, Install, Installation Options.
2. On the Products page, click the Mobile Inventory link to indicate that Mobile Inventory Management is installed.
3. Click Save.

If changes to the Installation table are needed, an informational message appears stating that you must log off and log back on to all clients and application servers for the changes to take effect. To comply, log off all clients, shut down, and restart all application servers, and then log back on to PeopleSoft FSCM for your changes to take effect.

See the product documentation for PeopleSoft FSCM: Mobile Inventory Management for more information and to set user preferences.

Task 20-6: Deploying the Mobile Application to Oracle Application Developer for an Oracle WebLogic Server

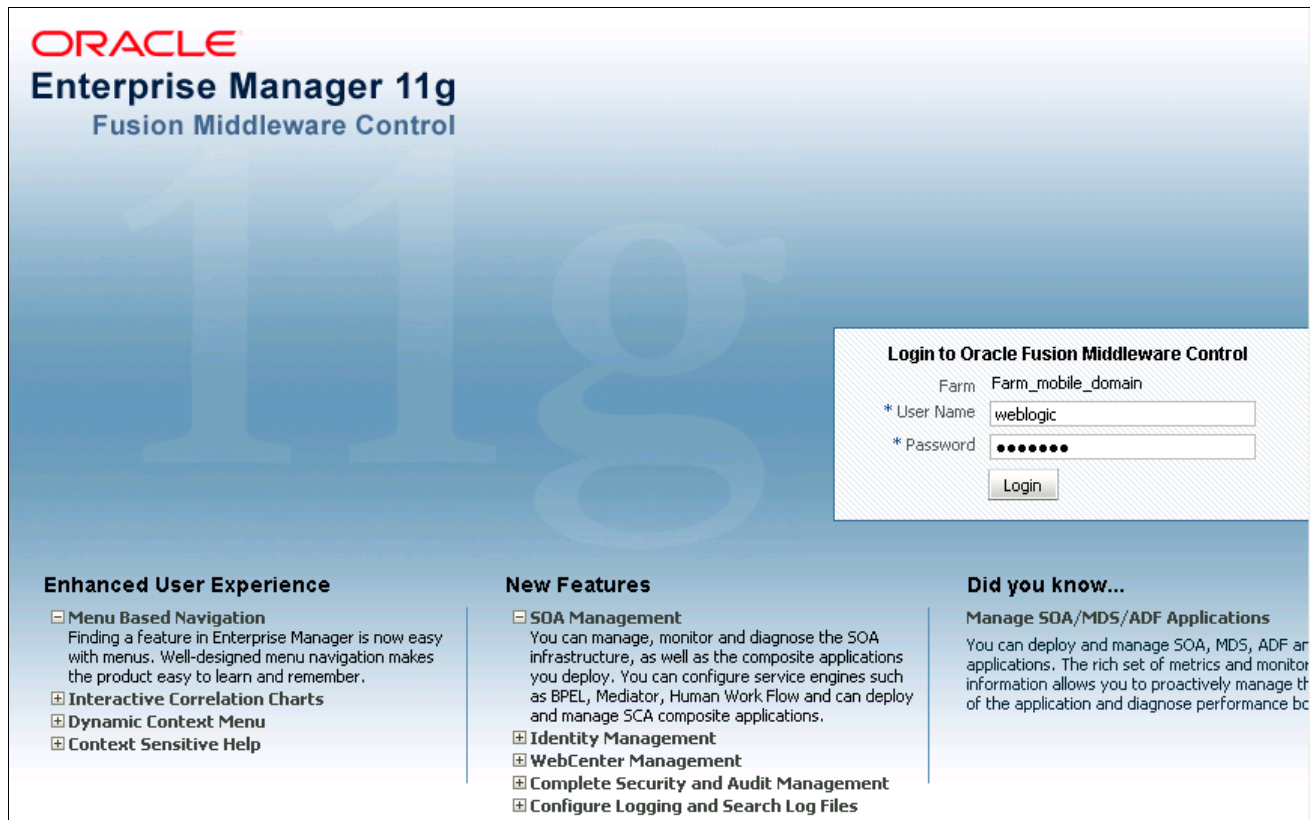
To deploy the mobile application to Oracle Application Developer for an Oracle WebLogic Server:

1. Start the Oracle Enterprise Manager.

For example, enter the following URL in a browser:

http://localhost:7001/em

The Oracle Enterprise Manager 11g Fusion Middleware Control - Login page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Login page

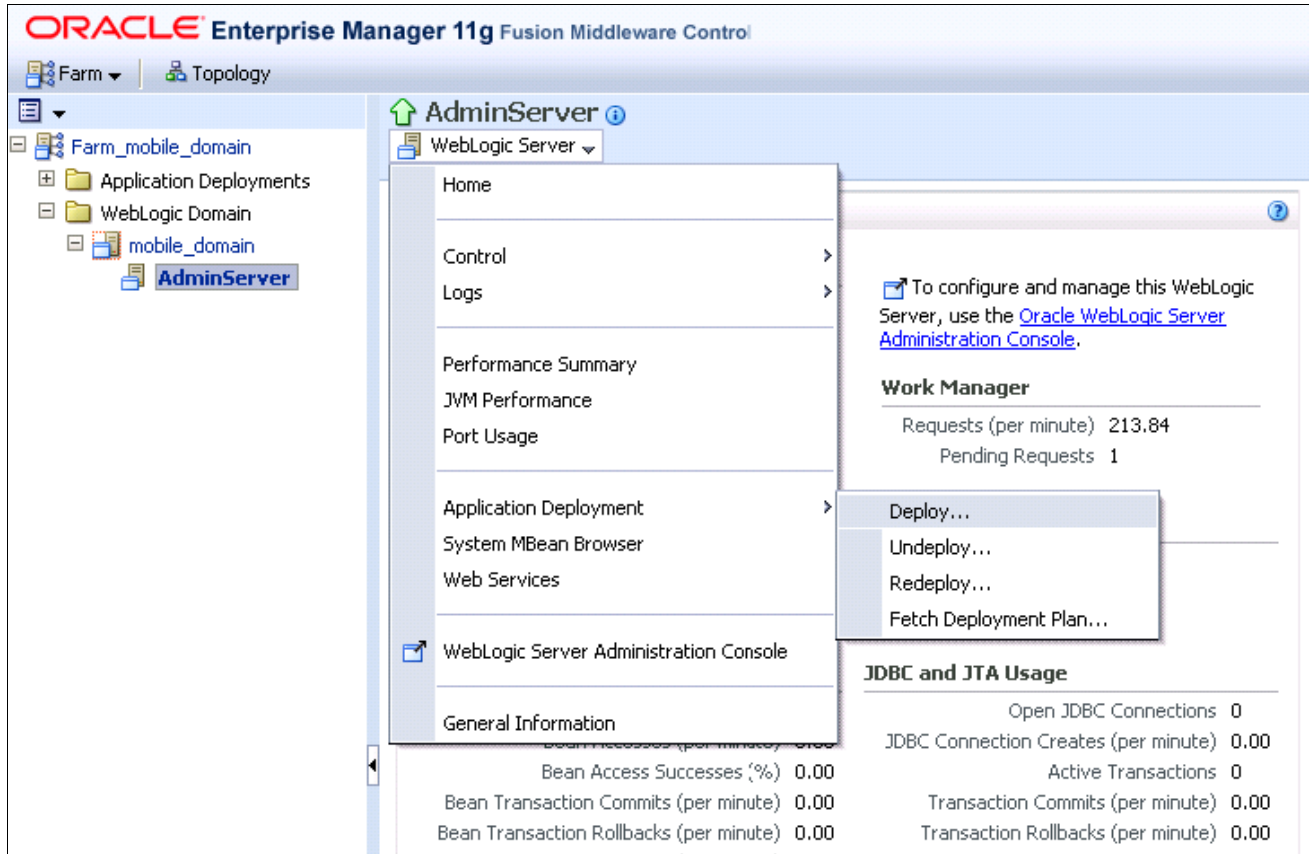
2. On the Login page, enter your user name and password and then click Login.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Farm Tree page appears.

- In the Farm tree under WebLogic Domain, select *mobile_domain* and then select the server where you want the application to deploy.

For example: AdminServer.

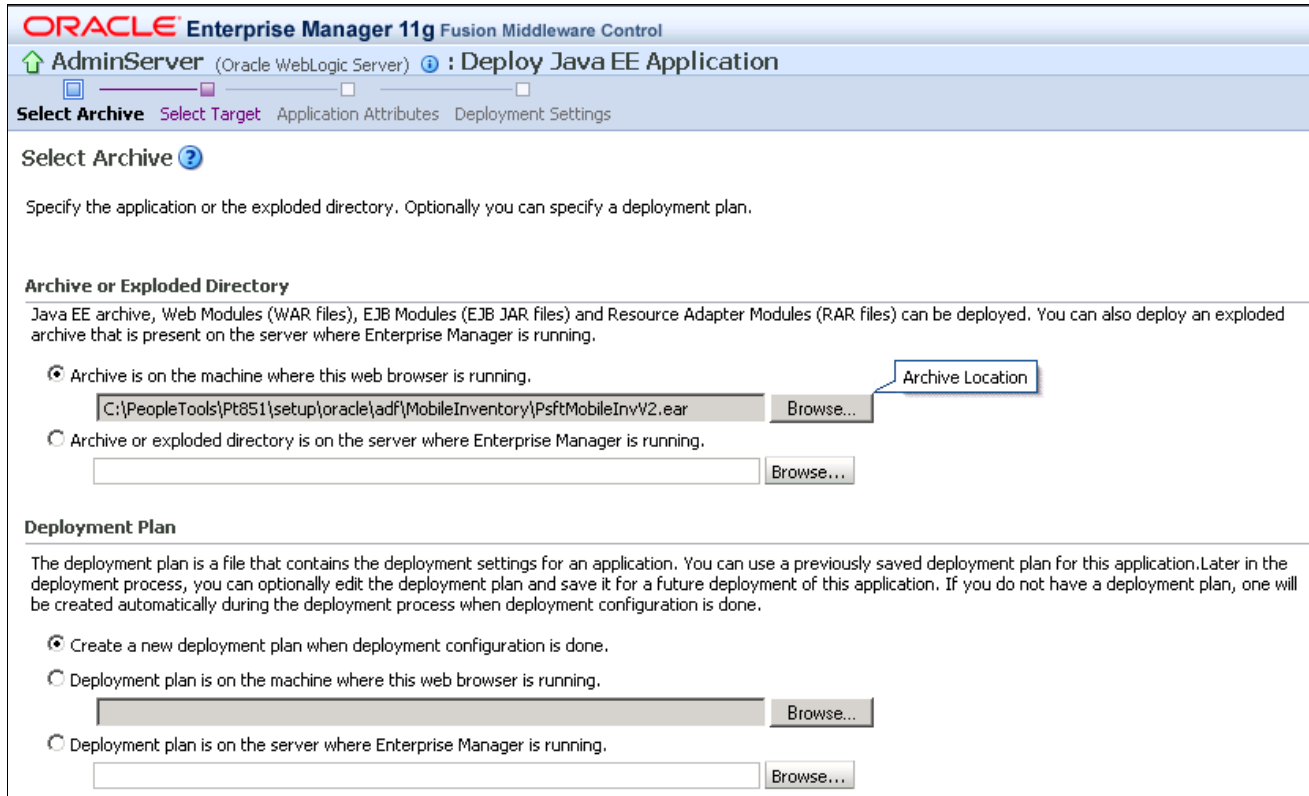
The Oracle Enterprise Manager 11g Fusion Middleware Control - Farm Tree page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Farm Tree page

- Select the WebLogic Domain drop-down list menu, and then select Application Deployment, Deploy.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Select Archive page appears, as shown in the following example:



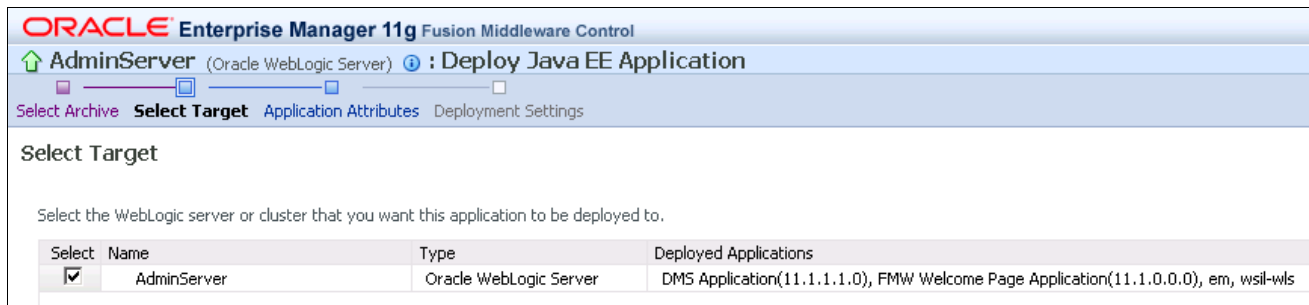
Oracle Enterprise Manager 11g Fusion Middleware Control - Select Archive page

- On the Select Archive page, click Browse to select the EAR file (either method works), and then click Next.

The EAR file is in `<PS_APP_HOME>\setup\oracle\adf\MobileInventory` directory.

For example: `c:\pt852\setup\oracle\adf\MobileInventory\PsfMMobileInv.ear`

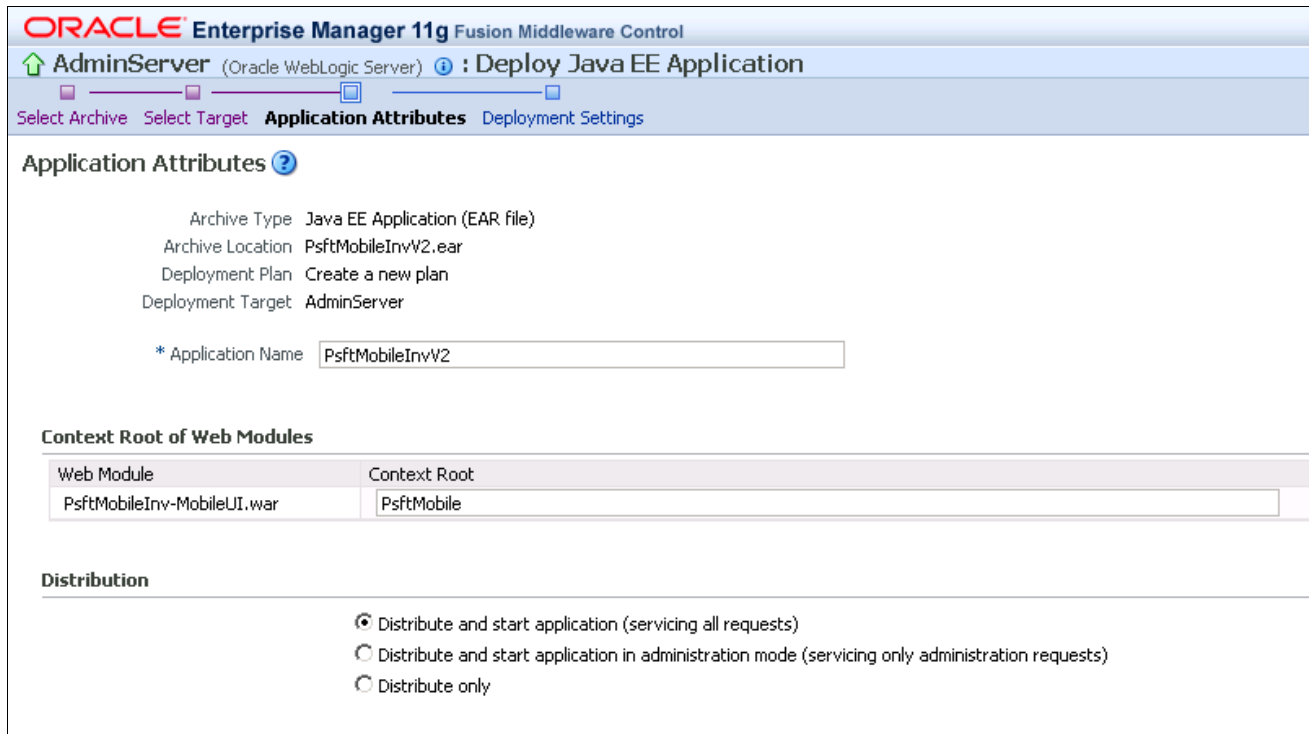
The Oracle Enterprise Manager 11g Fusion Middleware Control - Select Target page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Select Target page

- On the Select Target page, select your Target Server and click Next.

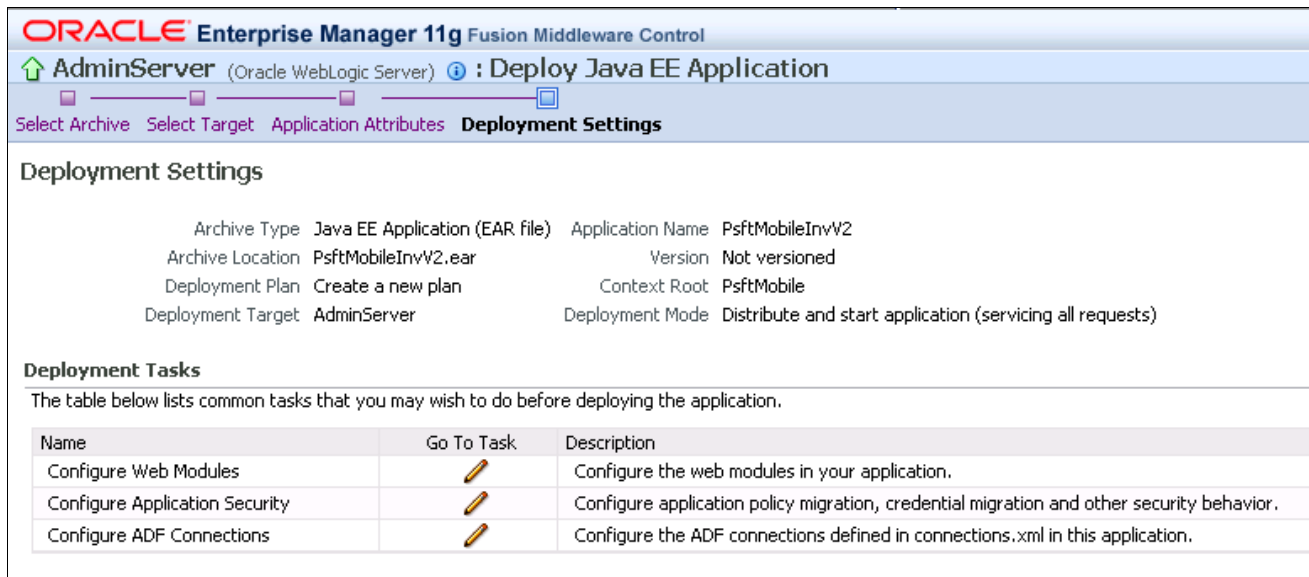
The Oracle Enterprise Manager 11g Fusion Middleware Control - Application Attributes page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Application Attributes page

- On the Application Attributes page, click Next.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Deployment Settings page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Deployment Settings page

- On the Deployment Settings page, click Go to Task (the pencil/edit icon) to select the *Configure ADF (Application Developer Framework) Connections* option to change the WSDL Endpoint URLs.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Configure ADF Connections page appears, as shown in the following example:

Configure ADF Connections Cancel Step 1 of 1 Apply

ADF Connections
Configure the ADF connections defined in connections.xml in this application.

Connection Type	Name	Description	Edit
Web Service	MIN_ADJUSTMENT	Web service connection	
Web Service	MIN_ALT_TYPES_GET	Web service connection	
Web Service	MIN_BIN_TRANSFER	Web service connection	
Web Service	MIN_CART_COUNT_GET	Web service connection	
Web Service	MIN_CART_COUNT_SAVE	Web service connection	
Web Service	MIN_COUNTING_EVENT_GET	Web service connection	
Web Service	MIN_COUNTING_EVENT_SET	Web service connection	
Web Service	MIN_COUNTING_EVENT_VALIDATE	Web service connection	
Web Service	MIN_EXPRESS_ISSUE	Web service connection	
Web Service	MIN_EXPRESS_ISSUE_VALIDATE	Web service connection	
Web Service	MIN_FUL_INQ_INV_HDR	Web service connection	
Web Service	MIN_ITEM_STK_INQ	Web service connection	
Web Service	MIN_LOOKUP_GENERIC_GET	Web service connection	
Web Service	MIN_MENU	Web service connection	
Web Service	MIN_NPRCPT_SAVE	Web service connection	
Web Service	MIN_OPTIONS	Web service connection	
Web Service	MIN_PROMPT_EDIT	Web service connection	
Web Service	MIN_RCPT_CNTR_GET	Web service connection	
Web Service	MIN_RCPT_CNTR_SAVE	Web service connection	
Web Service	MIN_RECV_DELIVERY	Web service connection	
Web Service	MIN_RECV_DELIVERY_SAVE	Web service connection	
Web Service	MIN_STCK_FEEDBK_GET	Web service connection	
Web Service	MIN_STCK_FEEDBK_SAVE	Web service connection	

Oracle Enterprise Manager 11g Fusion Middleware Control - Configure ADF Connections page

- On the Configure ADF Connections page, edit *each* Web Service and change to the appropriate PeopleSoft server.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Configure Web Service Connection page appears, as shown in the following example:

Configure Web Service Connection

Connection Type: Web Service
 Name: MIN_MENU
 Description: Web service connection

Connection Details

WSDL URL:

Ports

Port Name	URL	Proxy Host	Proxy Port
Service: MIN_MENU			
MIN_MENU_Port	http://machineNamePort/PSIGW/PeopleSoftServiceListeningConi		

OK Cancel

Oracle Enterprise Manager 11g Fusion Middleware Control - Configure Web Service Connection page

10. On the Configure Web Service Connection page, change both the WSDL URL and the URL in the Ports section.

Important! For both URLs, you must replace machineNamePort with your Gateway URL. In addition, if you changed the name of your LocalNode, you must change or add PSFT_EP to the new local node name. PSFT_EP is the default name for the local node.

For example: `http://machineNamePort/PSIGW/PeopleSoftServiceListeningConnector/PSFT_EP`.

A green dot appears next to any Web Service that has been modified, as shown in the following example. After you perform this step, all of the Web Services should display green dots (repeat for all connections).

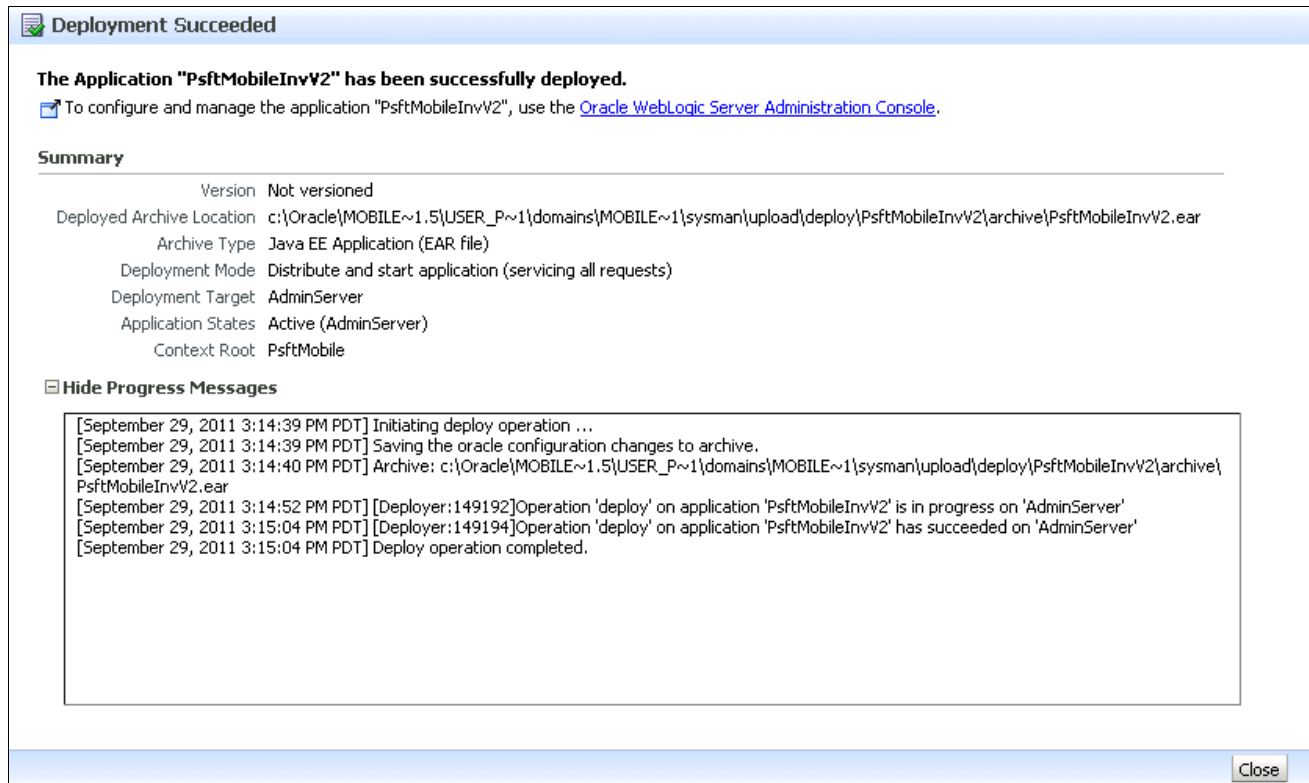
The screenshot shows the 'Configure ADF Connections' page in Oracle Enterprise Manager 11g. The page title is 'AdminServer (Oracle WebLogic Server) : Deploy Java EE Application'. The main heading is 'Configure ADF Connections' with 'Step 1 of 1' and 'Apply' buttons. Below the heading, it says 'Configure the ADF connections defined in connections.xml in this application.' A table lists 25 Web Service connections. The 'MIN_MENU' connection has a green dot next to its edit icon, indicating it has been modified.

Connection Type	Name	Description	Edit
Web Service	MIN_ADJUSTMENT	Web service connection	
Web Service	MIN_ALT_TYPES_GET	Web service connection	
Web Service	MIN_BIN_TRANSFER	Web service connection	
Web Service	MIN_CART_COUNT_GET	Web service connection	
Web Service	MIN_CART_COUNT_SAVE	Web service connection	
Web Service	MIN_COUNTING_EVENT_GET	Web service connection	
Web Service	MIN_COUNTING_EVENT_SET	Web service connection	
Web Service	MIN_COUNTING_EVENT_VALIDATE	Web service connection	
Web Service	MIN_EXPRESS_ISSUE	Web service connection	
Web Service	MIN_EXPRESS_ISSUE_VALIDATE	Web service connection	
Web Service	MIN_FUL_INQ_INV_HDR	Web service connection	
Web Service	MIN_ITEM_STK_INQ	Web service connection	
Web Service	MIN_LOOKUP_GENERIC_GET	Web service connection	
Web Service	MIN_MENU	Web service connection	
Web Service	MIN_NPRCPT_SAVE	Web service connection	
Web Service	MIN_OPTIONS	Web service connection	
Web Service	MIN_PROMPT_EDIT	Web service connection	
Web Service	MIN_RCPT_CNTR_GET	Web service connection	
Web Service	MIN_RCPT_CNTR_SAVE	Web service connection	
Web Service	MIN_RECV_DELIVERY	Web service connection	
Web Service	MIN_RECV_DELIVERY_SAVE	Web service connection	
Web Service	MIN_STCK_FEEDBK_GET	Web service connection	
Web Service	MIN_STCK_FEEDBK_SAVE	Web service connection	

Oracle Enterprise Manager 11g Fusion Middleware Control - Configure ADF Connections page

11. When you are done, click the Apply button, and then click the Deploy button.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Deployment Succeeded page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Deployment Succeeded page

When you complete the deployment correctly, the message "The application PSFTMobile has been successfully Deployed" appears on the screen.

12. Click the Close button.

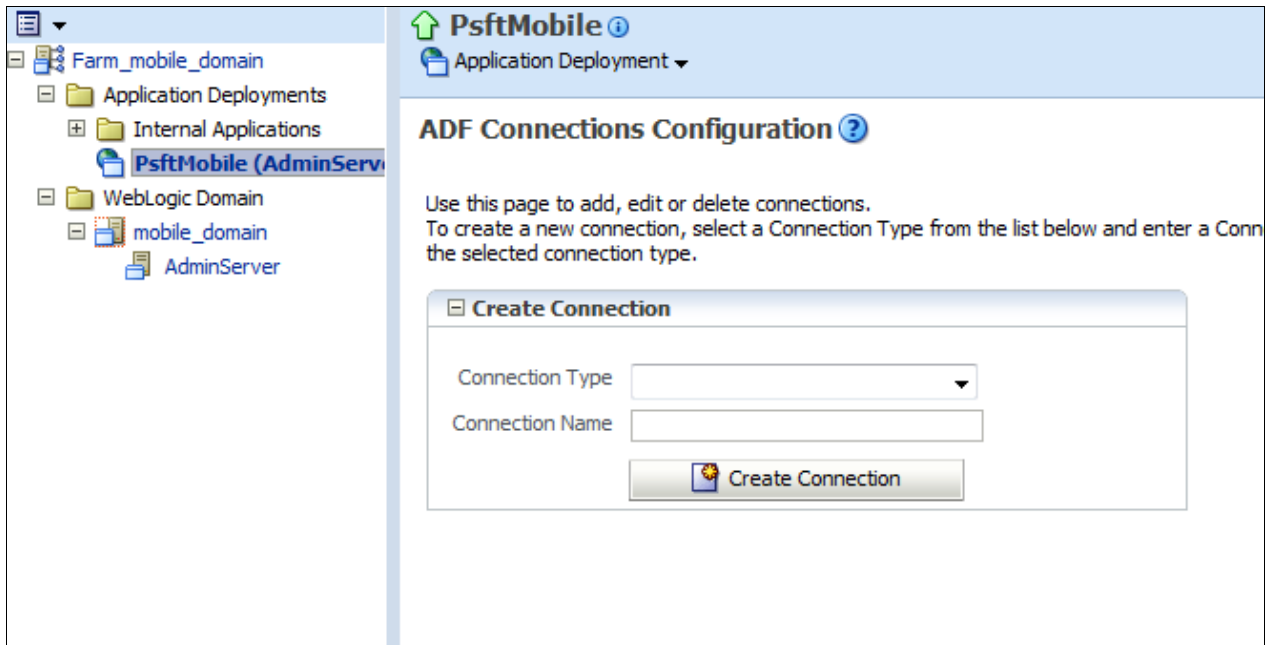
13. Stop and restart the WebServer.

14. (Optional) Verify the ADF connections .

You can use the Oracle Enterprise Manager to access and view the ADF connections that you used during deployment as follows:

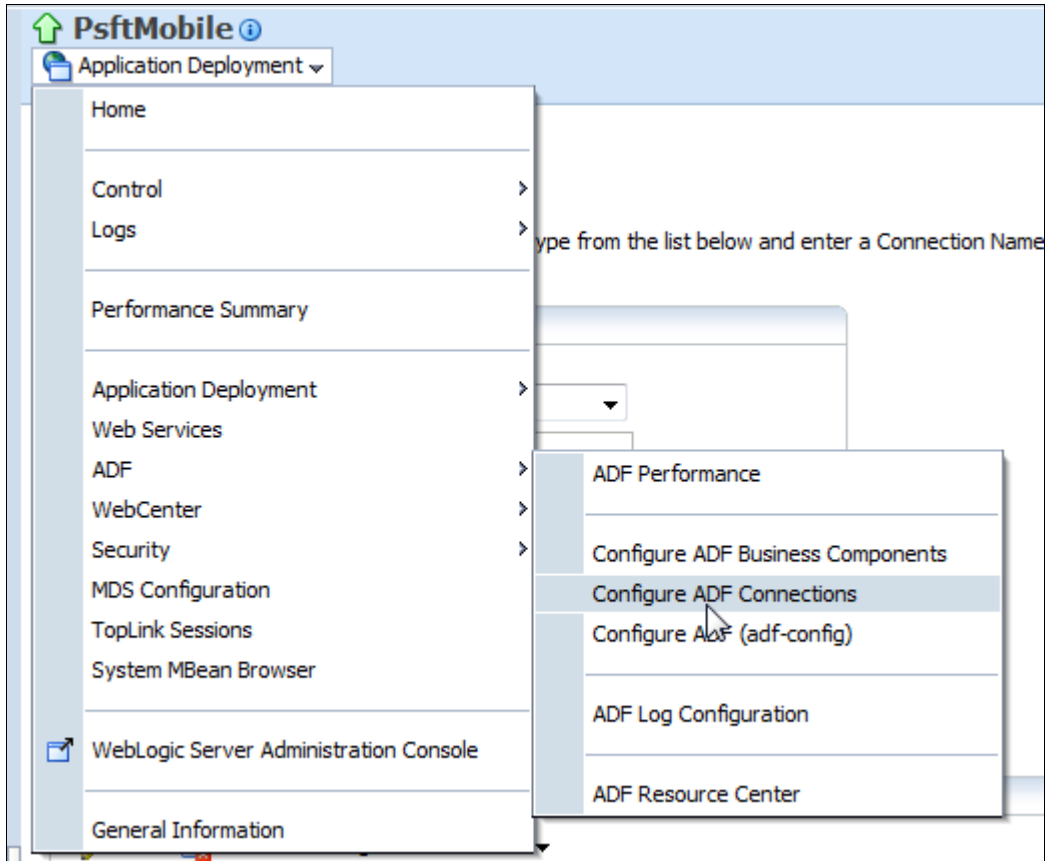
a. From the Application Deployment tree in the left pane, select PsftMobile.

- b. When you select PsftMobile, the Application Development drop-down list menu becomes available in the right pane.



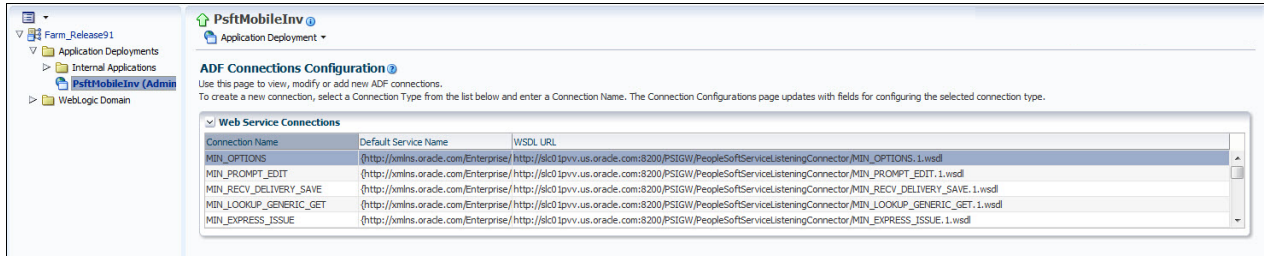
Oracle Enterprise Manager - PsftMobile: Application Deployment tree page

- c. From the Application Development drop-down list menu, select *ADF, Configure ADF Connections*, as shown in the following example:



Oracle Enterprise Manager menu navigation

The Oracle Enterprise Manager - Application Deployment: ADF Connections Configuration page appears, as shown in the following example:



Oracle Enterprise Manager - Application Deployment: ADF Connections Configuration page

15. To test deployment, log in to the mobile application from a desktop browser.

For example:

<http://localhost:7001/PsftMobileInv/faces/Login>

See the product documentation for PeopleSoft FSCM: Mobile Inventory Management for more details and instructions on how to configure mobile devices for PeopleSoft Mobile Inventory Management and other implementation instructions.

Task 20-7: Undeploying the Mobile Application

To undeploy the mobile application:

1. Start the Oracle Enterprise Manager.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Login page appears, as shown in the following example.

2. On the Login page, enter your user name and password and then click Login.

ORACLE
Enterprise Manager 11g
 Fusion Middleware Control

Login to Oracle Fusion Middleware Control

Farm Farm_mobile_domain

* User Name

* Password

Enhanced User Experience

- ☐ Menu Based Navigation
Finding a feature in Enterprise Manager is now easy with menus. Well-designed menu navigation makes the product easy to learn and remember.
- ☒ Interactive Correlation Charts
- ☒ Dynamic Context Menu
- ☒ Context Sensitive Help

New Features

- ☐ SOA Management
You can manage, monitor and diagnose the SOA infrastructure, as well as the composite applications you deploy. You can configure service engines such as BPEL, Mediator, Human Work Flow and can deploy and manage SCA composite applications.
- ☒ Identity Management
- ☒ WebCenter Management
- ☒ Complete Security and Audit Management
- ☒ Configure Logging and Search Log Files

Did you know...

Manage SOA/MDS/ADF Applications

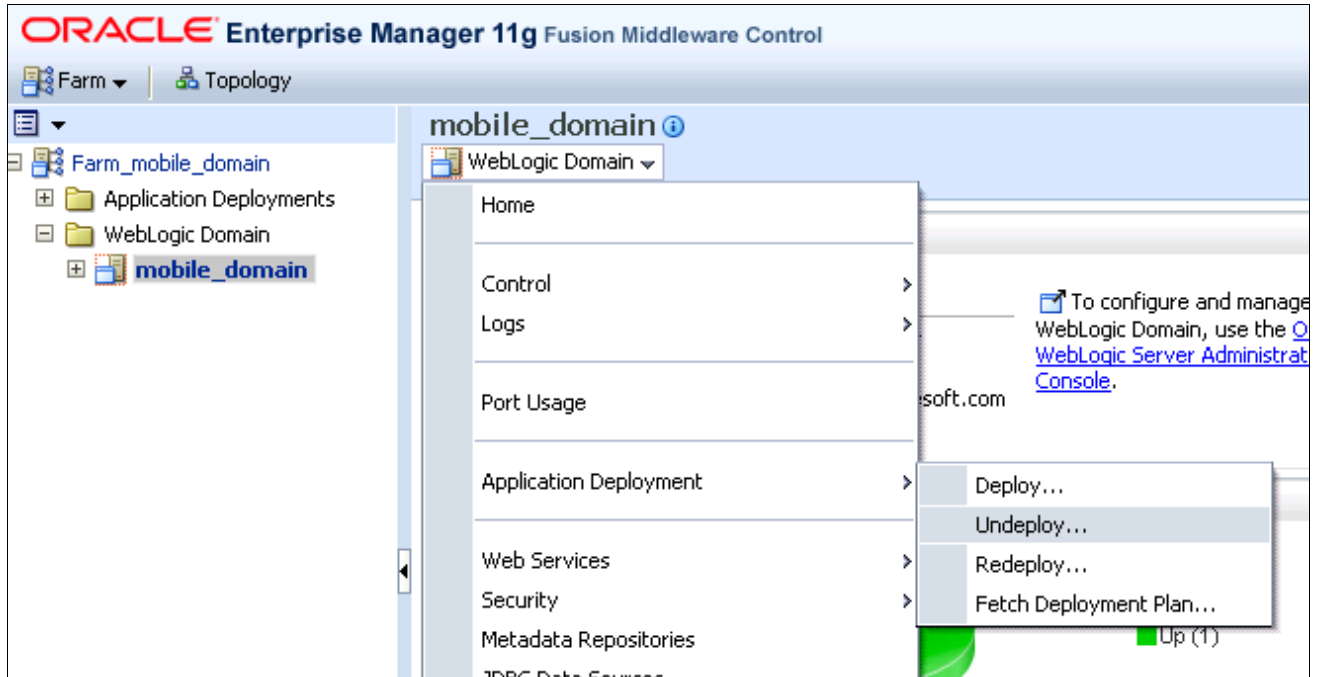
You can deploy and manage SOA, MDS, ADF applications. The rich set of metrics and monitoring information allows you to proactively manage the application and diagnose performance bottlenecks.

Oracle Enterprise Manager 11g Fusion Middleware Control - Login page

3. In the Farm tree under WebLogic Domain, select *mobile_domain* and then select the server where you want the application to deploy.

For example: *AdminServer*.

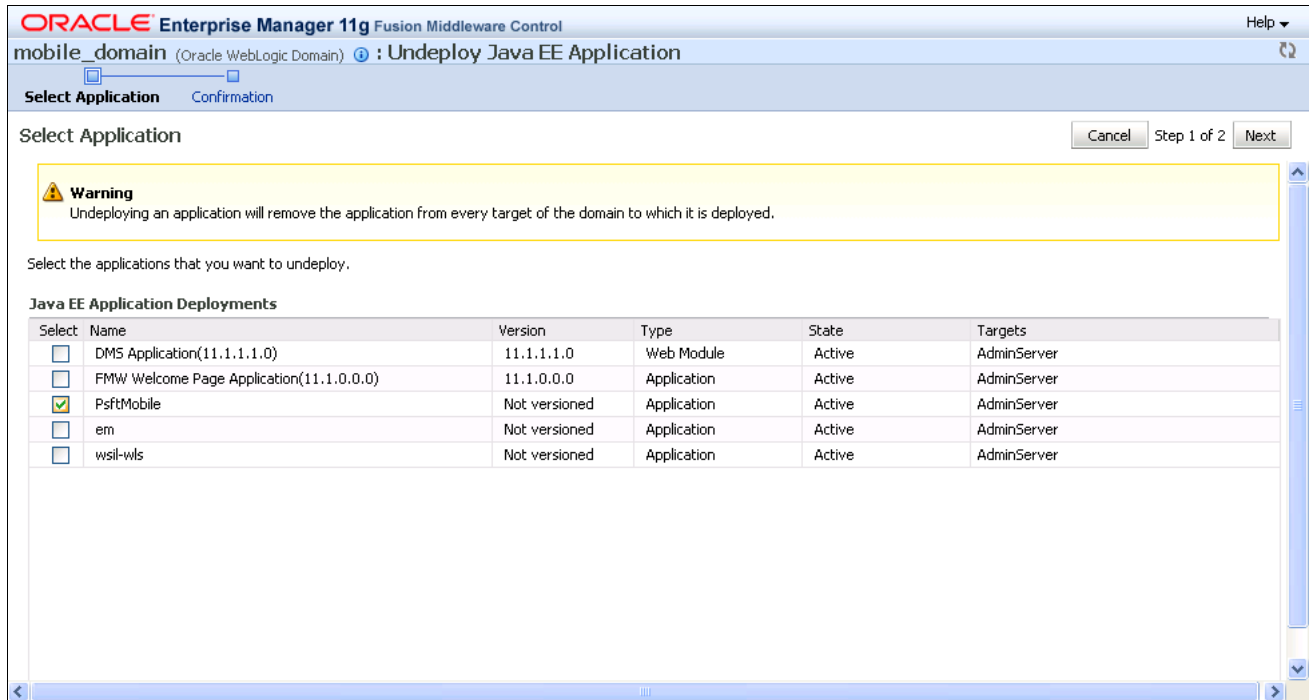
The Oracle Enterprise Manager 11g Fusion Middleware Control - Farm tree page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Farm tree

- On the Farm Tree page, under the Server Name, select the WebLogic Server drop-down list menu, and then select *Application Deployment, Undeploy*.

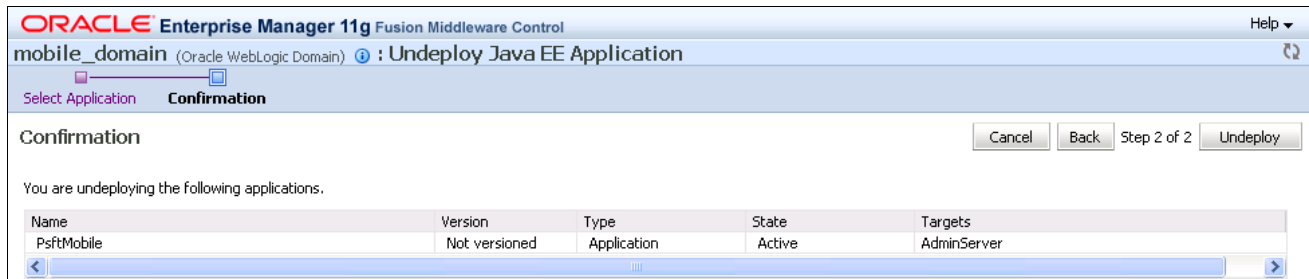
The Oracle Enterprise Manager 11g Fusion Middleware Control - Select Application page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Select Application page

- On the Select Application page, select Application PsftMobile and click Next.

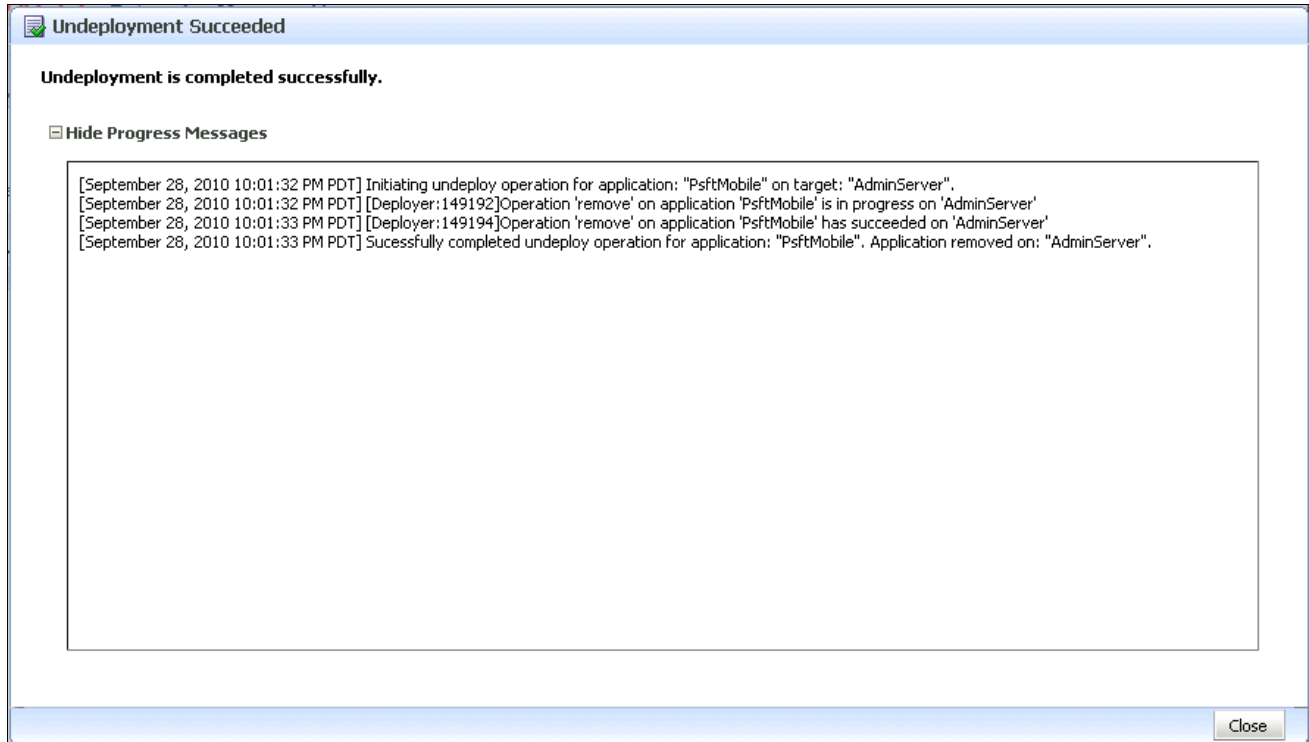
The Oracle Enterprise Manager 11g Fusion Middleware Control - Confirmation page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Confirmation page

6. On the Confirmation page, click the Undeploy button.

The Oracle Enterprise Manager 11g Fusion Middleware Control - Undeployment Succeeded page appears, as shown in the following example:



Oracle Enterprise Manager 11g Fusion Middleware Control - Undeployment Succeeded page

7. Deploy the new EAR file by following the instructions in the task titled Deploying the Mobile Application to Oracle Application Developer for an Oracle WebLogic Server.
8. Restart the Oracle WebLogic Server.

Chapter 21

Configuring WS-Security for PeopleSoft Mobile Inventory Management

This chapter discusses:

- Understanding WS-Security
- Prerequisites
- Understanding the Configuration Process
- Configuring WS-Security for PeopleSoft Mobile Inventory Management

Understanding WS-Security

The PeopleSoft Mobile Inventory Management server communicates to the PeopleSoft Gateway using exposed Web Services from the PeopleSoft system. Generic installations do not secure these web services. It is acceptable for development and testing environments to use a generic installation. However, for a production system, this could pose a security risk. It is up to each installation team to determine if and how they plan to secure the web services that the PeopleSoft Mobile Inventory Management application uses. The application can run with or without applying WS-Security to the web service calls.

This chapter provides a *sample* installation of WS-Security using Security Assertion Markup Language (SAML). SAML is an XML-based open standard for communicating authentication and authorization data between secure domains and is certified with PeopleSoft PeopleTools 8.54.

This installation chapter does not cover the many options and alternatives available to implement WS-Security. Token encryption, SSL and non-SAML based WS-Security are options that you can add or substitute at your installation site as alternatives. To learn more about these alternatives, see the Integration Broker documentation.

See *PeopleTools: PeopleSoft Integration Broker*.

Note. Oracle does not support a username token with clear text name and password when using the PeopleSoft Mobile Inventory Management application. Implementing WS-Security requires an x509 certificate to establish identity.

Prerequisites

Before you begin, ensure that you meet the following requirements:

- Installation and testing of the PeopleSoft 9.2 Mobile Inventory Management application is complete.
You should not apply WS-Security to an unvalidated system.
- Administrative access to the PeopleSoft Mobile Inventory Management server.

- Administrative access to the PeopleSoft Web server.
- A PeopleSoft User ID that has permission to update security configuration information.
- An x.509 and root certificate from a trusted certificate authority.

Note. The steps in this installation chapter generate a self-validating certificate, instead of a trusted certificate. Oracle does not recommend that you secure your production system with generated self-signed certificates. You should obtain an x.509 and root certificate from a trusted certificate authority.

- Download of the Oracle Repository Creation Utility (RCU) is complete.

To perform the WS-Security tasks in this chapter, you must use RCU. RCU must be run prior to installing the Oracle Web Services Manager (OWSM).

To access RCU:

1. Access the Oracle Technology Network at this URL:
<http://www.oracle.com/technetwork/index.html>
2. Select Downloads, SOA Suite
3. In the Oracle SOA Suite 11g Installations section (on that page) expand the "Prerequisites & Recommended Install Process" section.
4. Download RCU.

Understanding the Configuration Process

Several tasks are necessary to configure WS-Security for the PeopleSoft Mobile Inventory Management application. There may be dependencies between the steps. Therefore, Oracle recommends that you run the tasks in this chapter in the following order.

Note. These steps are described in detail and in the correct order in the following section, Configuring WS-Security for PeopleSoft Mobile Inventory Management.

1. Run RCU to create a metadata repository.
OWSM uses this repository to secure policies.
2. Install OWSM, a prerequisite application that is part of Oracle Fusion Middleware.
Using WS-Security client policies requires that you install OWSM on the PeopleSoft Mobile Inventory Management web server. The installation instructions for OWSM are available in this chapter.
3. Configure the certificates between the Mobile server and the PeopleSoft server.
4. Create the keystore and credential store on the Mobile server.
5. Add the SAML definition information to the PeopleSoft system so that the system can validate and enable the identity of the Mobile server through WS-Security settings.
Optionally, you can set policies on web services so that they cannot be called without the appropriate WS-Security.
6. Update the connections.xml file to enforce security policies.
Oracle delivers the connections.xml file with the PeopleSoft Mobile Inventory Management application.

Task 21-1: Configuring WS-Security for PeopleSoft Mobile Inventory Management

This section discusses:

- Running the Oracle Repository Creation Utility
 - Installing the Oracle Web Services Manager
 - Configuring the Certificates
 - Creating and Configuring the Keystore and Credential Store
 - Adding the SAML Definition Information to the PeopleSoft System
 - Updating the connections.xml to Enforce Security Policies
-

Important! There may be dependencies between the tasks necessary to configure WS-Security for the PeopleSoft Mobile Inventory Management application. Oracle recommends that you run the following tasks in the order provided.

Task 21-1-1: Running the Oracle Repository Creation Utility

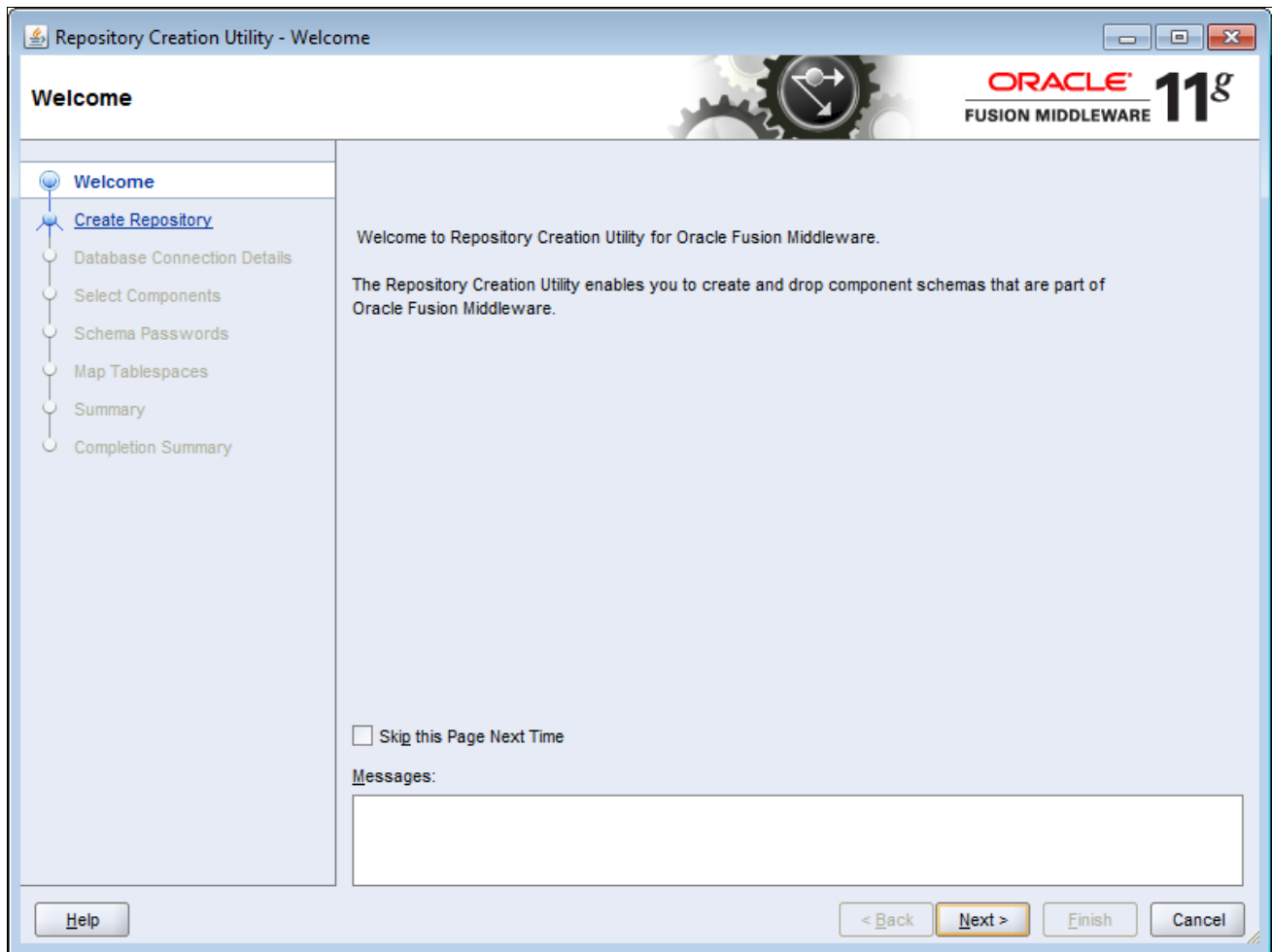
You must run RCU prior to installing the OWSM.

To download and run RCU:

1. Download RCU from the Oracle Technology Network as previously described.
See Prerequisites.
2. Unzip the rcuHome.zip file into an accessible rcuHome drive.

3. Launch the RCU executable file /rcuHome/bin/rcu.bat.

The startup dialog box on the Welcome page appears, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility - Welcome page

- 4. On the Repository Creation Utility Welcome page, click Next.

The Repository Creation Utility - Create Repository page (Step 1 of 7) appears, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility - Create Repository page (Step 1 of 7)

5. On the Create Repository page (Step 1 of 7), select Create and then click Next.

The Repository Creation Utility - Create Repository page (Step 2 of 7) appears, as shown in the following example:

Oracle Fusion Middleware: Repository Creation Utility - Create Repository page (Step 2 of 7): Database Connection Details

6. On the Create Repository (Step 2 of 7) - Database Connection Details page, do the following:
- In the Database Type field, select the database type to store the metadata services repository from the drop-down list box.

For example: *Oracle Database*

This changes the database connection information that the utility requires (only Oracle connection information is shown).

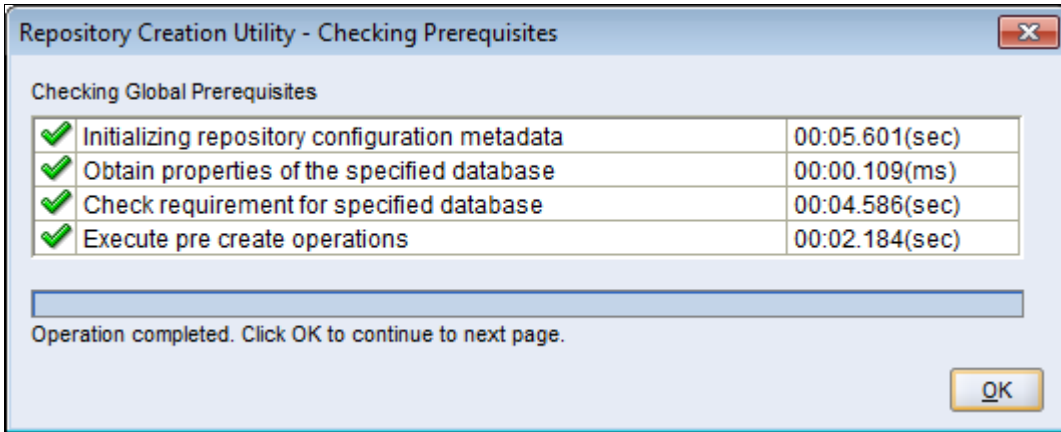
For most installations, you select the PeopleSoft database. However, you can choose a database other than the PeopleSoft database if you prefer. This database stores metadata for the OWSM system.

- Complete the database location and user information, based on the type of database that you select.

Note. The utility must create tables and table spaces. Therefore, the user ID and password that you enter must have DBA or SYSDBA privileges.

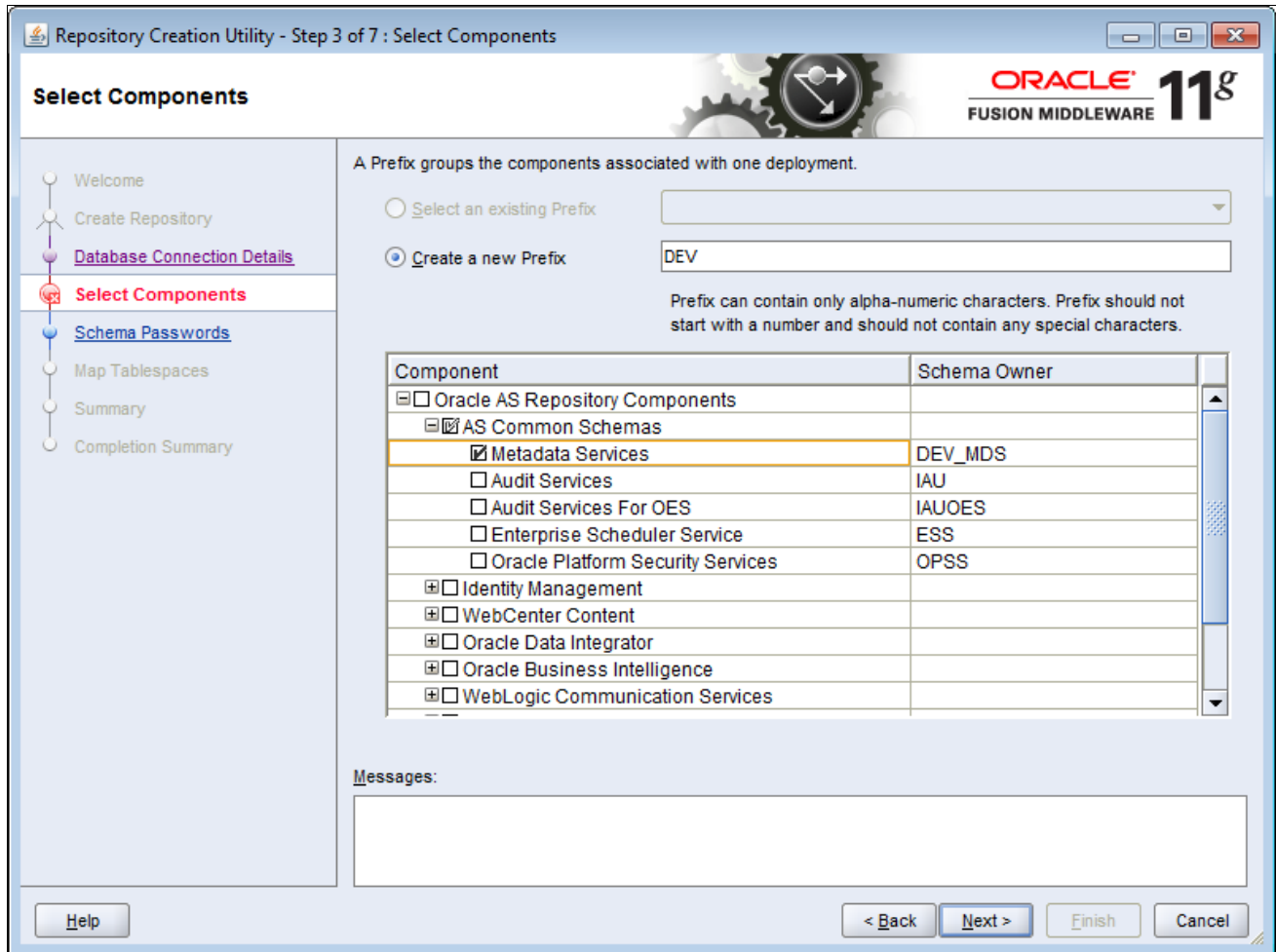
- c. Click Next.

The Repository Creation Utility - Checking Prerequisites page appears, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility - Checking Prerequisites page

7. On the Repository Creation Utility - Checking Prerequisites page, RCU determines if the database meets the minimum requirements to create the repository and connection. After this process completes, click OK.
The Repository Creation Utility - Create Repository (Step 3 of 7) - Select Components page appears, as shown in the following example:

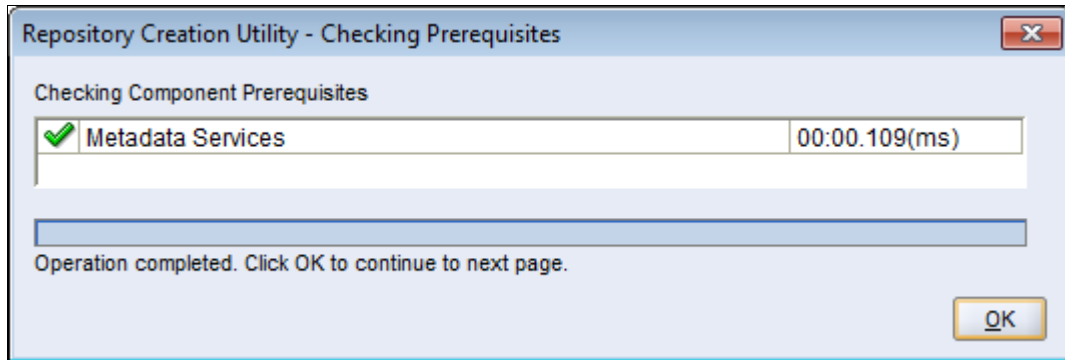


Oracle Fusion Middleware: Repository Creation Utility (Step 3 of 7) - Select Components page

8. On the Repository Creation Utility (Step 3 of 7) - Select Components page, select the option *Create a new Prefix*, and then enter *DEV* in the adjacent field.
9. In the Component section, expand the AS Common Schemas and select the Metadata Services check box.
The Schema Owner column automatically populates. This is the only component that you need to create.

10. Click Next.

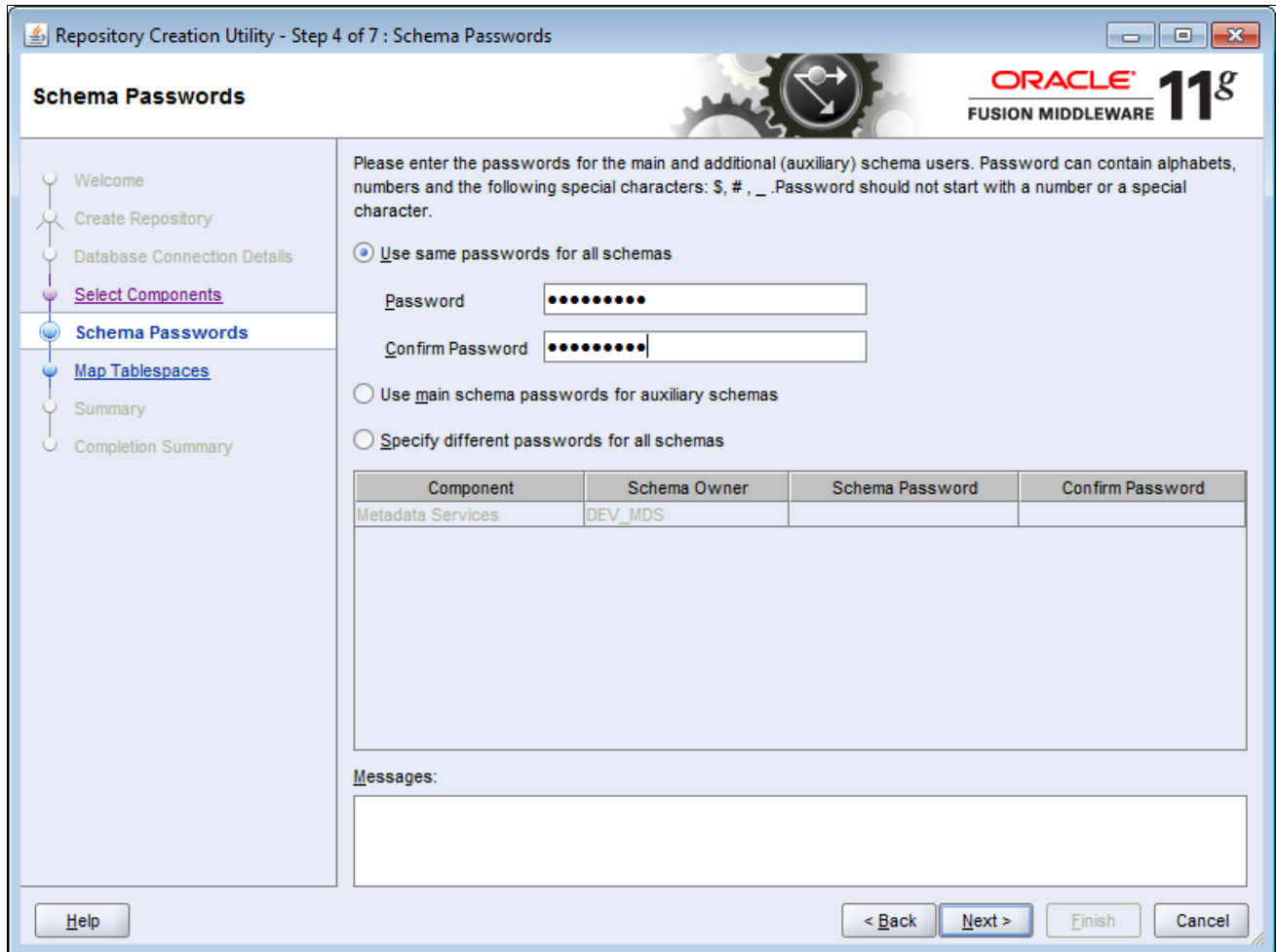
The Repository Creation Utility - Checking Prerequisites page appears, as shown in the following example:



Repository Creation Utility - Checking Prerequisites page

- On the Repository Creation Utility - Check Prerequisites page, RCU validates that the database is capable of creating the components that you select. After this process completes, click OK.

The Repository Creation Utility (Step 4 of 7) - Schema Passwords page appears, as shown in the following example:



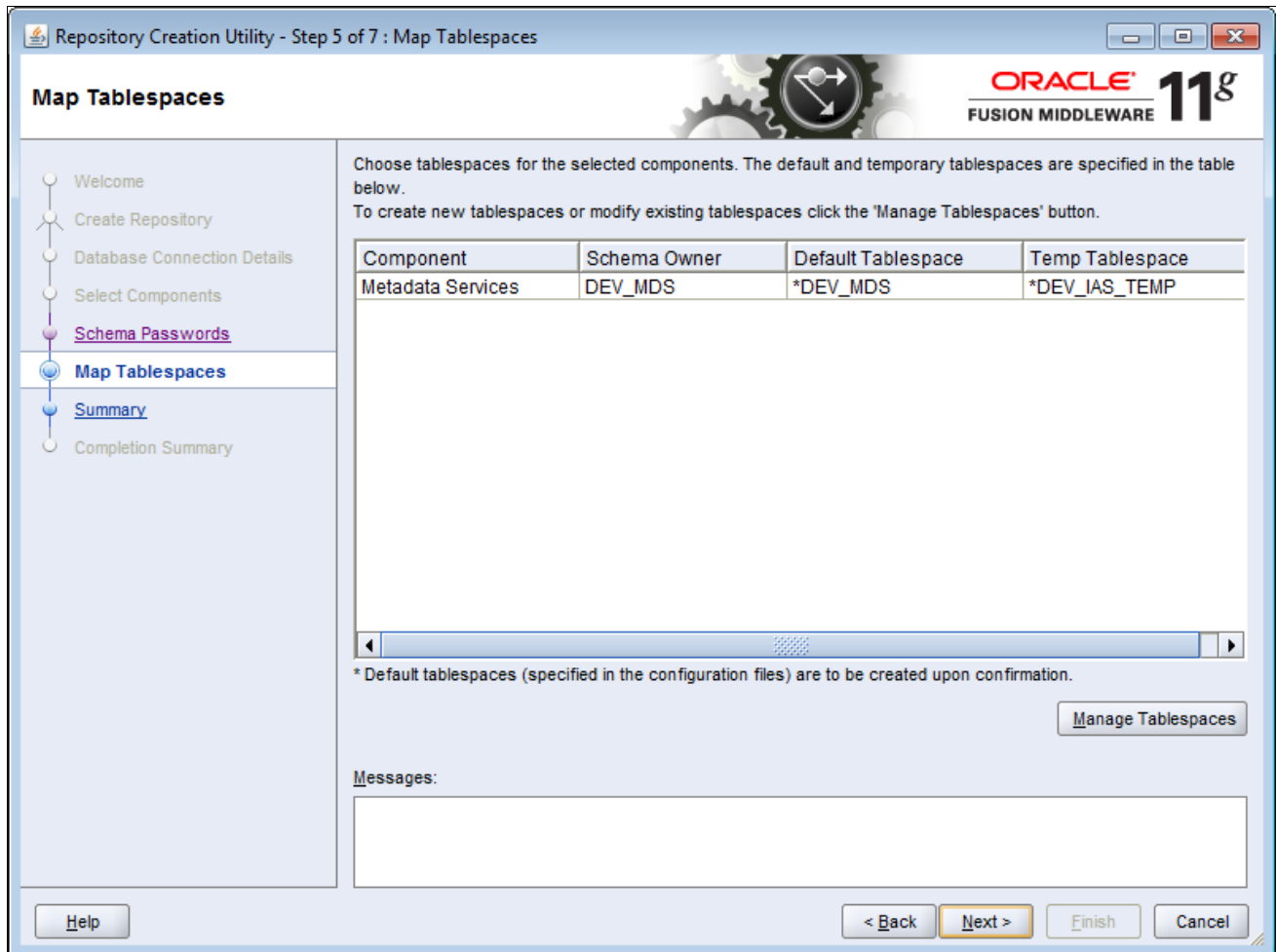
Oracle Fusion Middleware: Repository Creation Utility (Step 4 of 7) - Schema Passwords page

- On the Repository Creation Utility (Step 4 of 7) - Schema Passwords page, accept the default option *Use same passwords for all schemas*, and then enter and confirm your password. The system uses this password in the next task when you install OWSM.

Alternatively, you can select the options *Use main schema passwords for auxiliary schemas* or *Specify different passwords for all schemas*, and then enter and confirm your passwords accordingly.

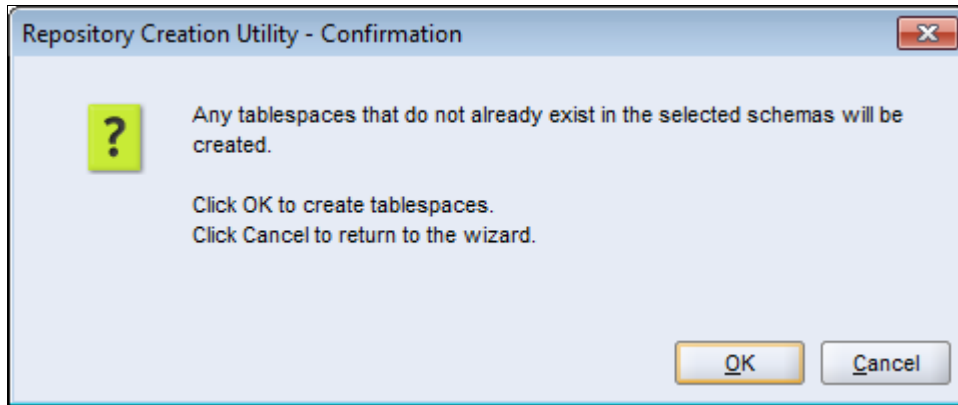
13. Click Next.

The Repository Creation Utility (Step 5 of 7) - Map Tablespaces page appears, as shown in the following example:



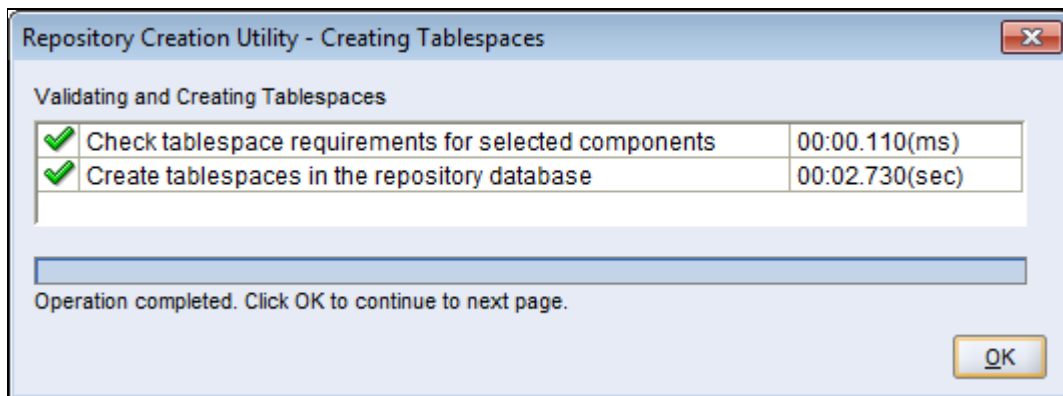
Oracle Fusion Middleware: Repository Creation Utility (Step 5 of 7) - Map Tablespaces page

14. The Repository Creation Utility (Step 5 of 7) - Map Tablespaces page displays the default and temporary tablespaces that the system uses for the component that you are installing. Accept the defaults and click Next. A message box appears that states "Any tablespaces that do not already exist in the selected schemas will be created," as shown in the following example:



Repository Creation Utility - Message box

15. On the Repository Creation Utility message box, click OK to create the tablespaces. The Repository Creation Utility - Creating Tablespaces page appears, as shown in the following example:

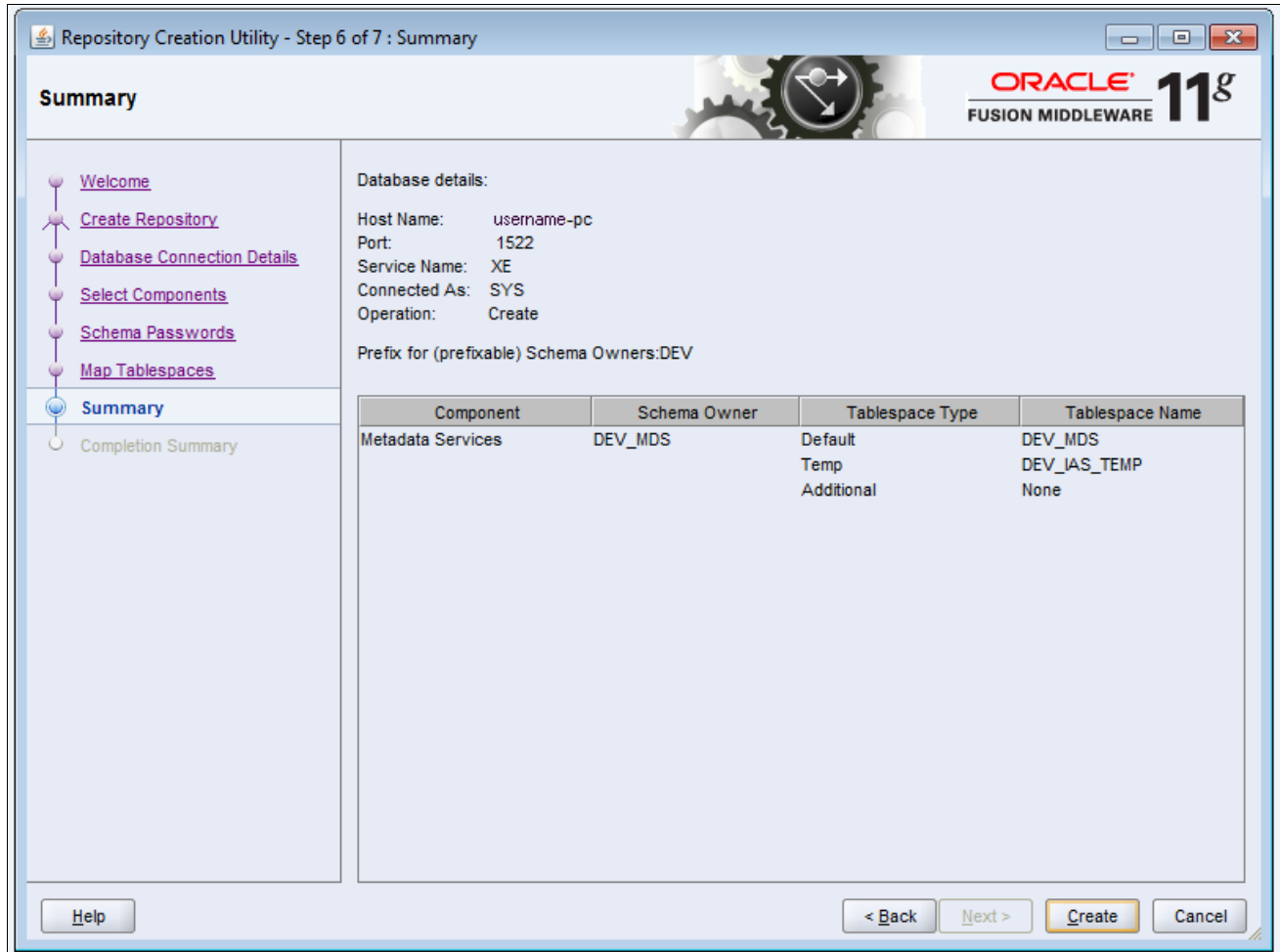


Repository Creation Utility - Creating Tablespaces page

16. On the Repository Creation Utility - Creating Tablespaces page, the Oracle RCU validates and executes the tablespace creation.

After this process completes, click OK.

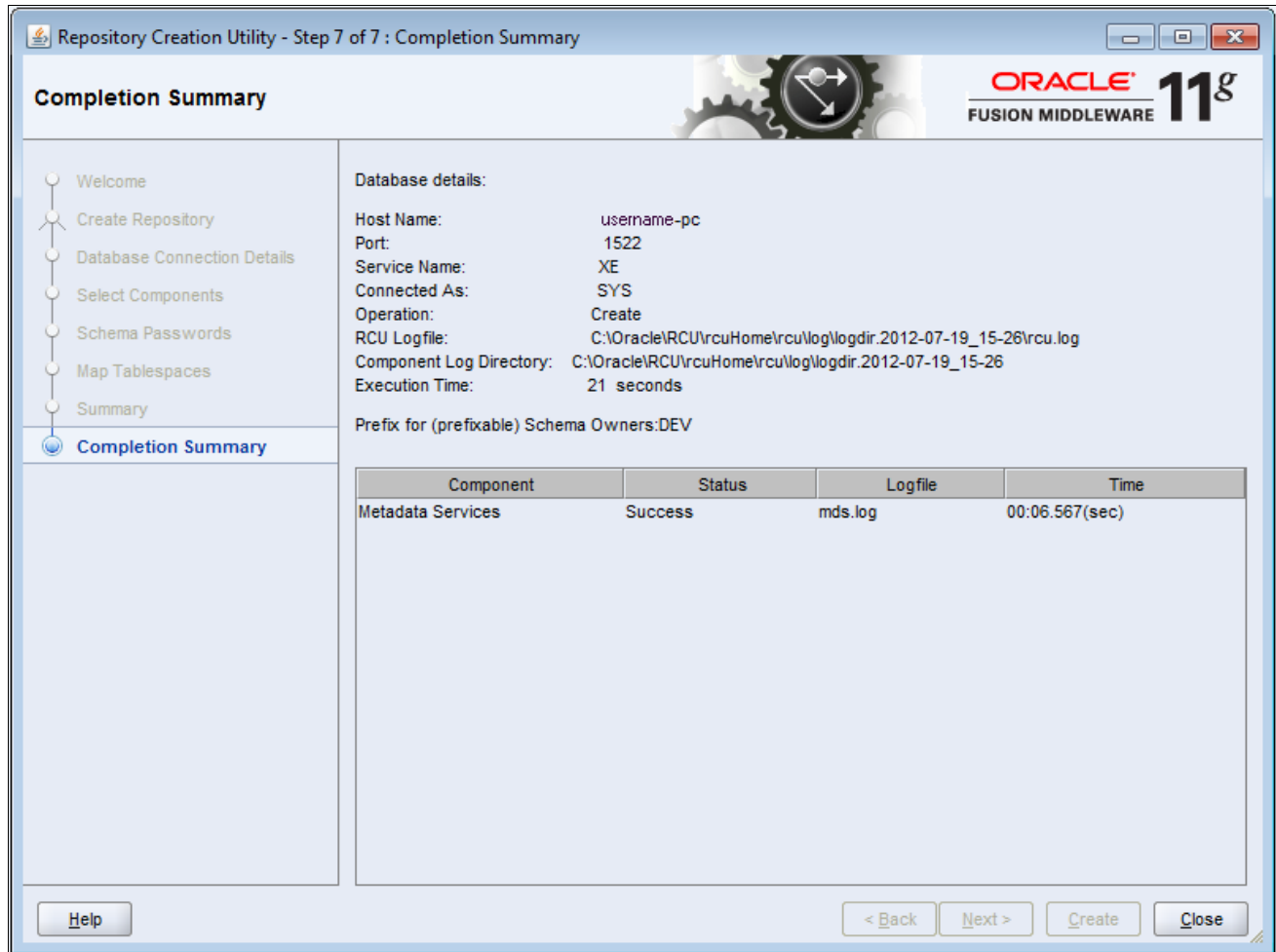
The Repository Creation Utility (Step 6 of 7) - Summary page appears and displays the complete settings for the database and component that you are installing, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility (Step 6 of 7) - Summary page

17. On the Repository Creation Utility (Step 6 of 7) - Summary page, click Create to begin the repository creation process.

The Repository Creation Utility (Step 7 of 7) - Completion Summary page appears and displays the metadata component's successful installation, as shown in the following example:



Oracle Fusion Middleware: Repository Creation Utility (Step 7 of 7) - Completion Summary page

18. On the Repository Creation Utility (Step 7 of 7) - Completion Summary page, click the Close button to complete and exit the installation.

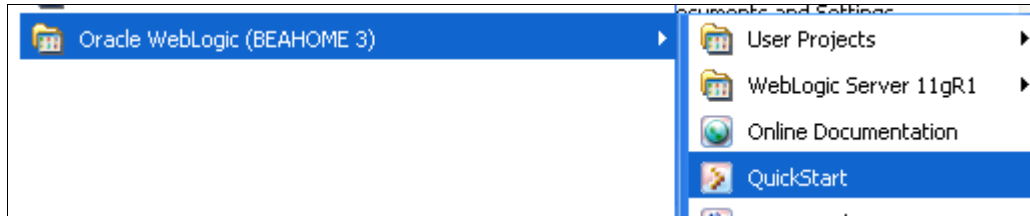
Task 21-1-2: Installing the Oracle Web Services Manager

The Oracle Web Services Manager (OWSM) applies client policies on the PeopleSoft Mobile Inventory Management application. OWSM requires access to a database and supports Oracle, Microsoft SQL Server, DB2 z/OS or DB2 LUW. You can use any compatible database. Using the PeopleSoft database for OWSM is not a requirement, but is acceptable and does not impact the production system.

You can install OWSM from the Quick Start installation program that installs the Oracle Enterprise Manager.

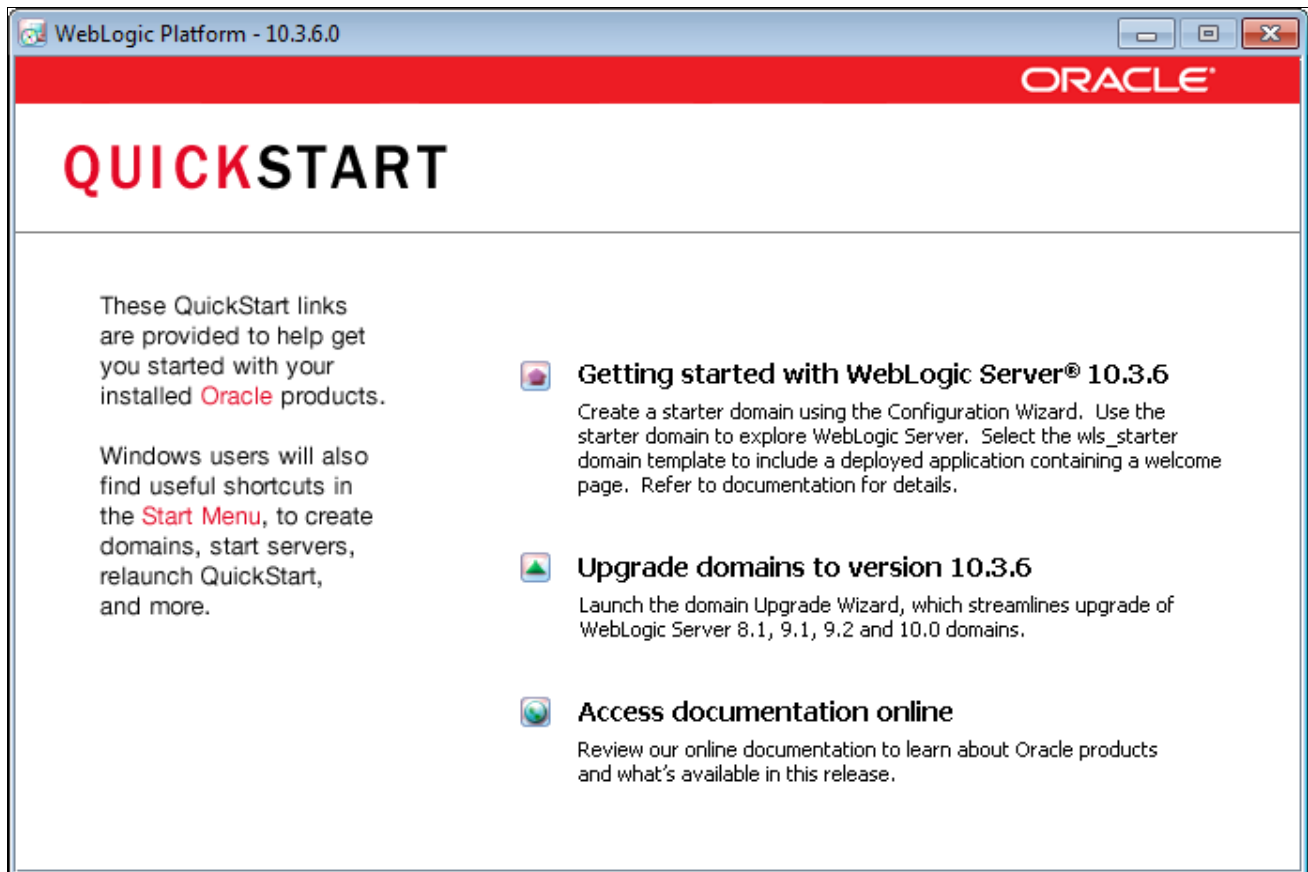
To install OWSM:

1. Use the menu options from the Program Group to select Oracle WebLogic, QuickStart, as shown in the following example:



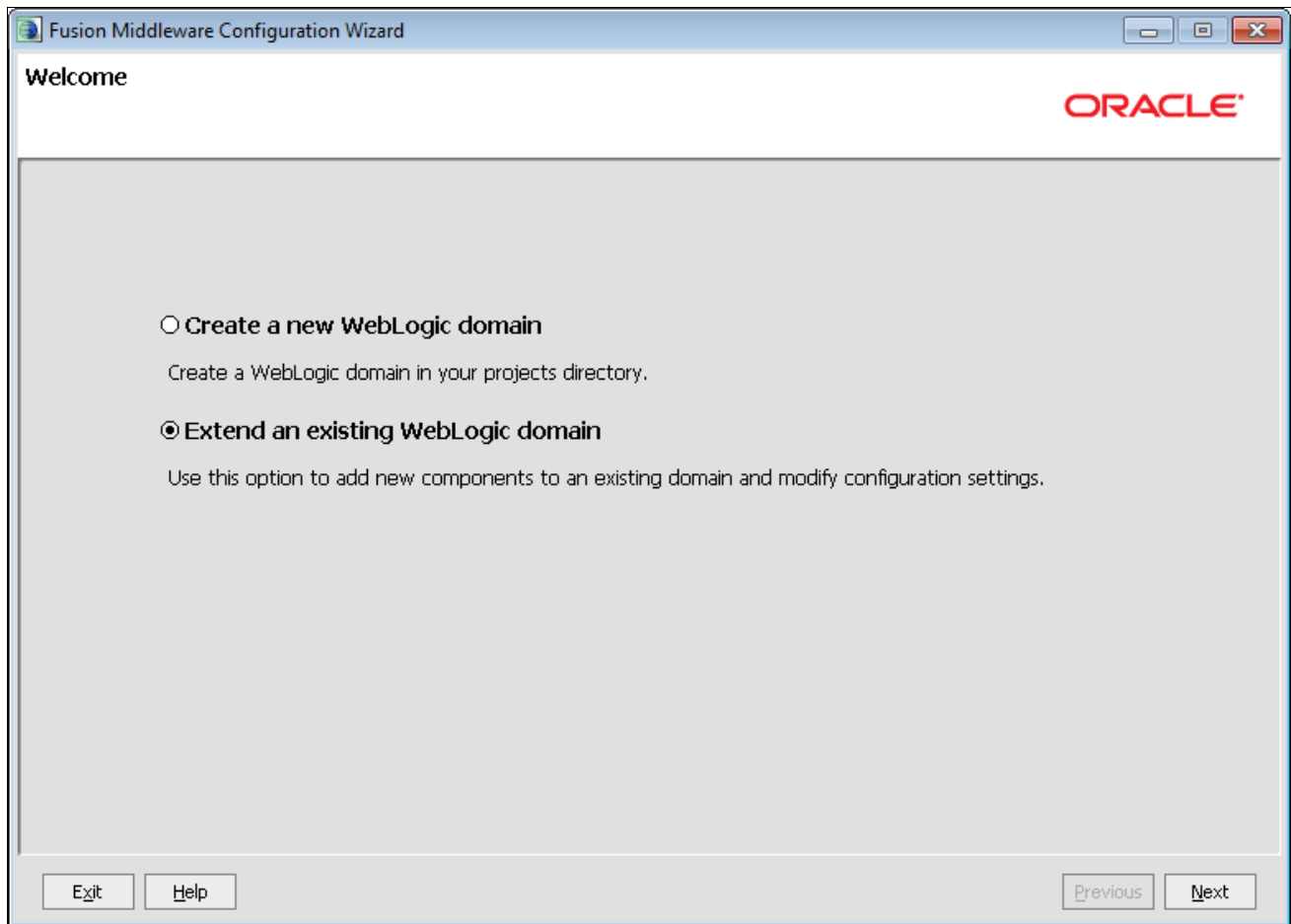
Oracle WebLogic - Menu navigation from the Program Group to access QuickStart

The WebLogic Platform - QuickStart page appears, as shown in the following example:



WebLogic Platform - QuickStart page

- From the QuickStart Main Menu page, click the option *Getting started with WebLogic Server 10.3.6*. The Fusion Middleware Configuration Wizard - Welcome page appears, as shown in the following example:

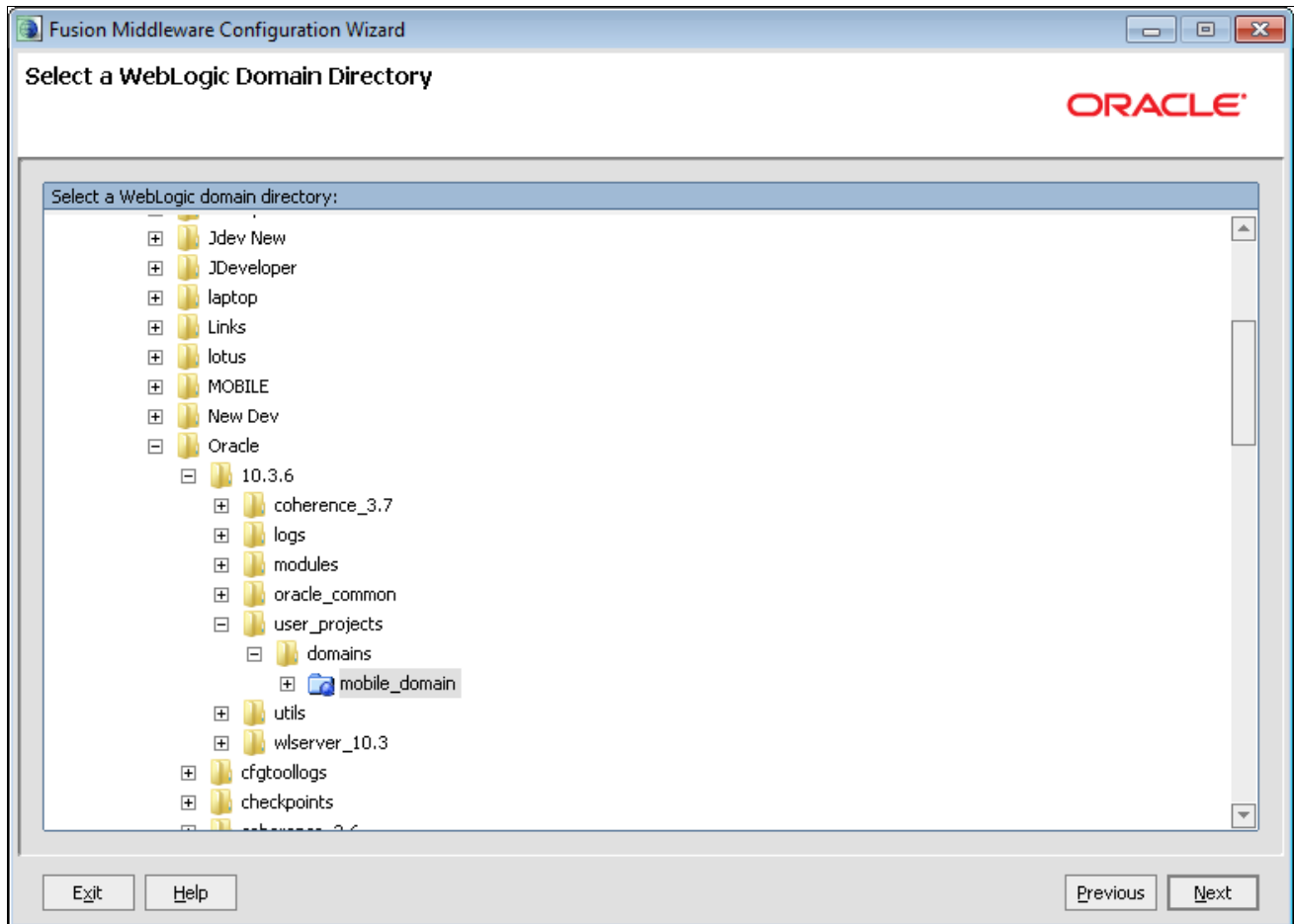


Fusion Middleware Configuration Wizard - Welcome page

- On the Welcome page, select the option *Extend an existing WebLogic domain*.

4. Click Next.

The Fusion Middleware Configuration Wizard - Select a WebLogic Domain Directory page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select a WebLogic Domain Directory page

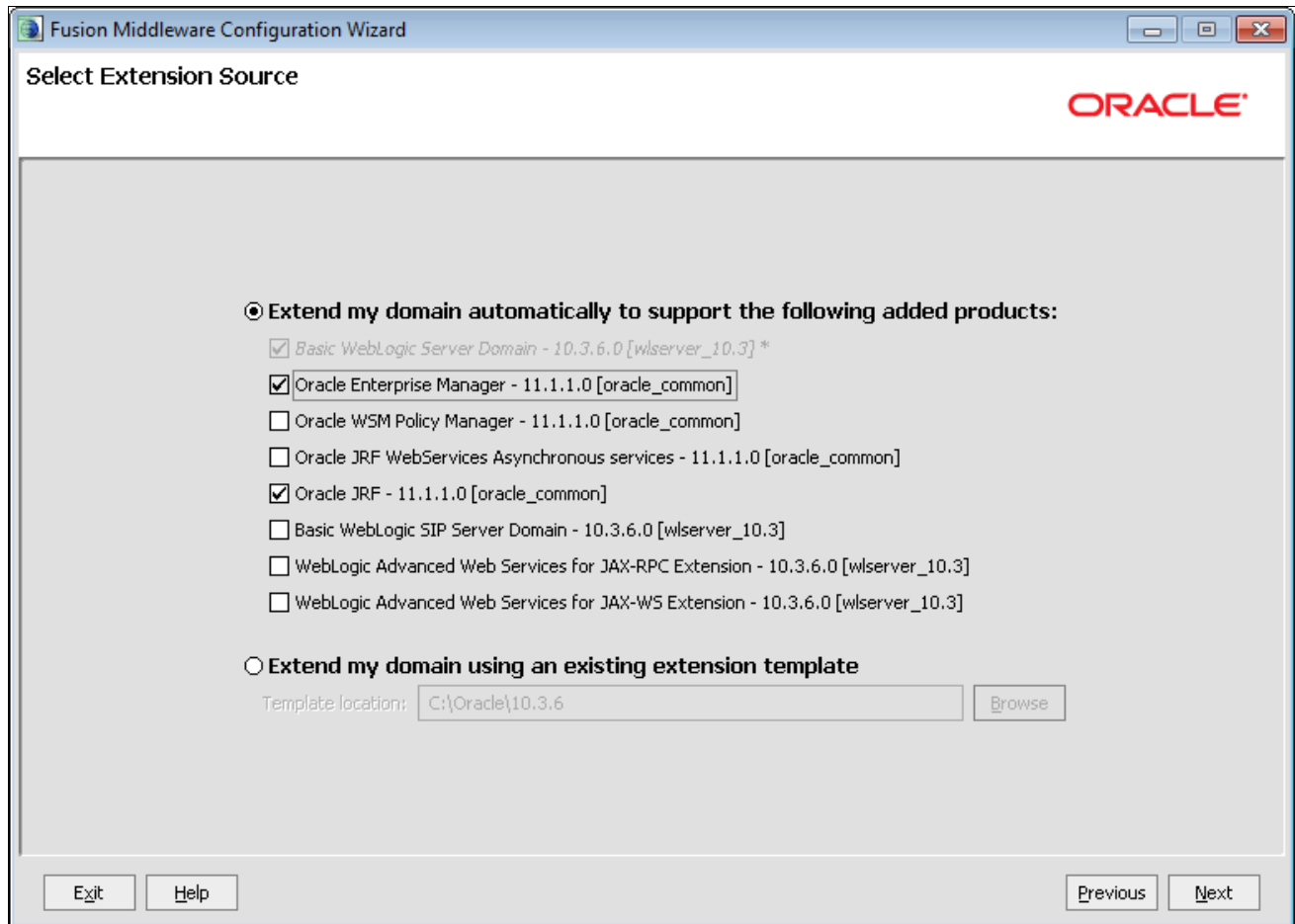
5. On the Select a WebLogic Domain Directory page, select the domain for your PeopleSoft Mobile Inventory Management application.

The domain is under the directory that you created when performing step 4 of the task titled "Installing the Oracle WebLogic Server for PeopleSoft Mobile Inventory Management," discussed earlier in the chapter titled "Installing PeopleSoft 9.2 Mobile Inventory Management".

The domain name was entered in step 7 of the task titled "Starting the Configuration Wizard to Define a New Domain," discussed earlier in the chapter titled "Installing PeopleSoft 9.2 Mobile Inventory Management."

6. Click Next.

The Fusion Middleware Configuration Wizard - Select Extension Source page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Extension Source page

7. On the Select Extension Source page, select the option *Extend my domain automatically to support the following added products*, and then select the check box for the *Oracle WSM Policy Manager – 11.1.1.0 (oracle_common)* product.

8. Click Next.

The Fusion Middleware Configuration Wizard - Configure JDBC Component Schema page appears, as shown in the following example:

Note: Change only the input fields below that you wish to modify and values will be applied to all selected rows.

Vendor: Oracle DBMS/Service: XEXDB

Driver: *Oracle's Driver (Thin) for Service connections; Versions:9.0.1 and later Host Name: USERNAME-PC.peoplesoft.com

Schema Owner: DEV_MDS Port: 1522

Schema Password: *****

RAC configuration for component schemas:

Convert to GridLink Convert to RAC multi data source Don't convert

	Component Schema	DBMS/Service	Host Name	Port	Schema Owner	Schema Password
<input checked="" type="checkbox"/>	OWSM MDS Schema	XEXDB	USERNAME-PC.people	1522	DEV_MDS	*****

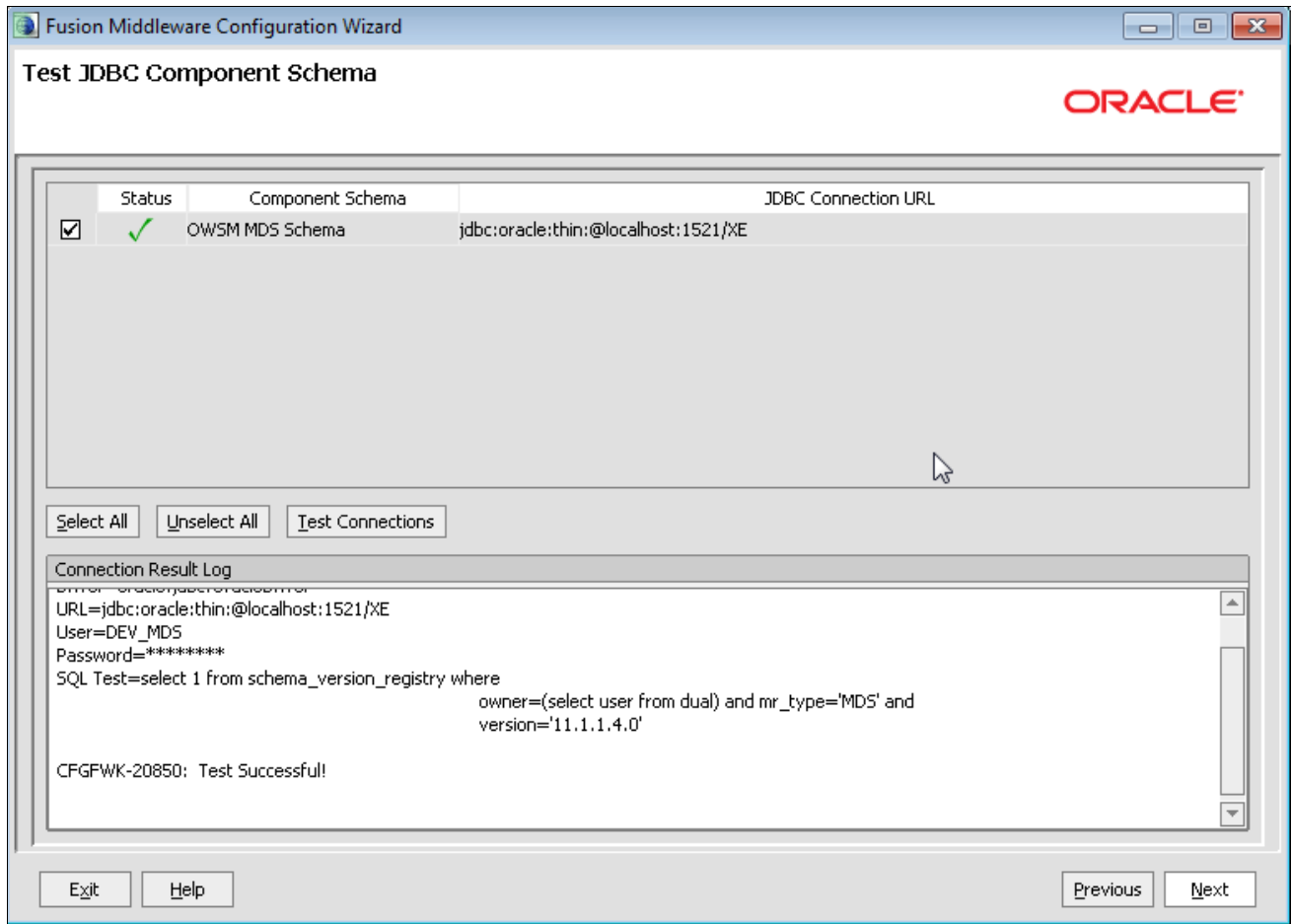
Exit Help Previous Next

Fusion Middleware Configuration Wizard - Configure JDBC Component Schema page

9. On the Configure JDBC Component Schema page, the information that you enter must match the information in the preceding task titled "Running the Oracle Repository Creation Utility."

10. Click Next.

The Fusion Middleware Configuration Wizard - Test JDBC Component Schema page appears, as shown in the following example:

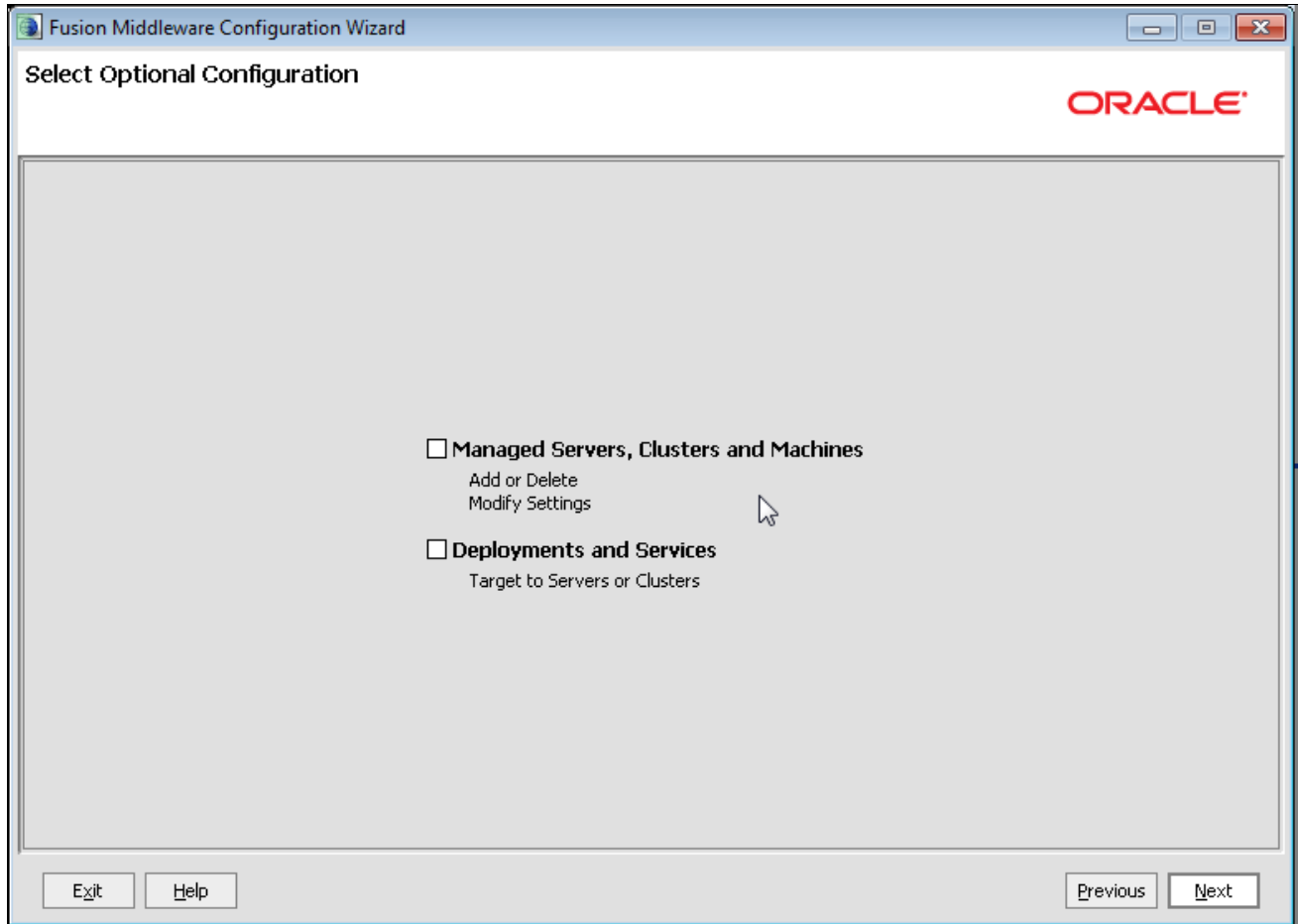


Fusion Middleware Configuration Wizard - Test JDBC Component Schema page

11. The Test JDBC Component Schema page requires no action. Click Next.

The Test JCBC Component Schema page confirms that the information on the Configure JDBC Component Schema page is correct to use when installing the OWSM Policy Manager.

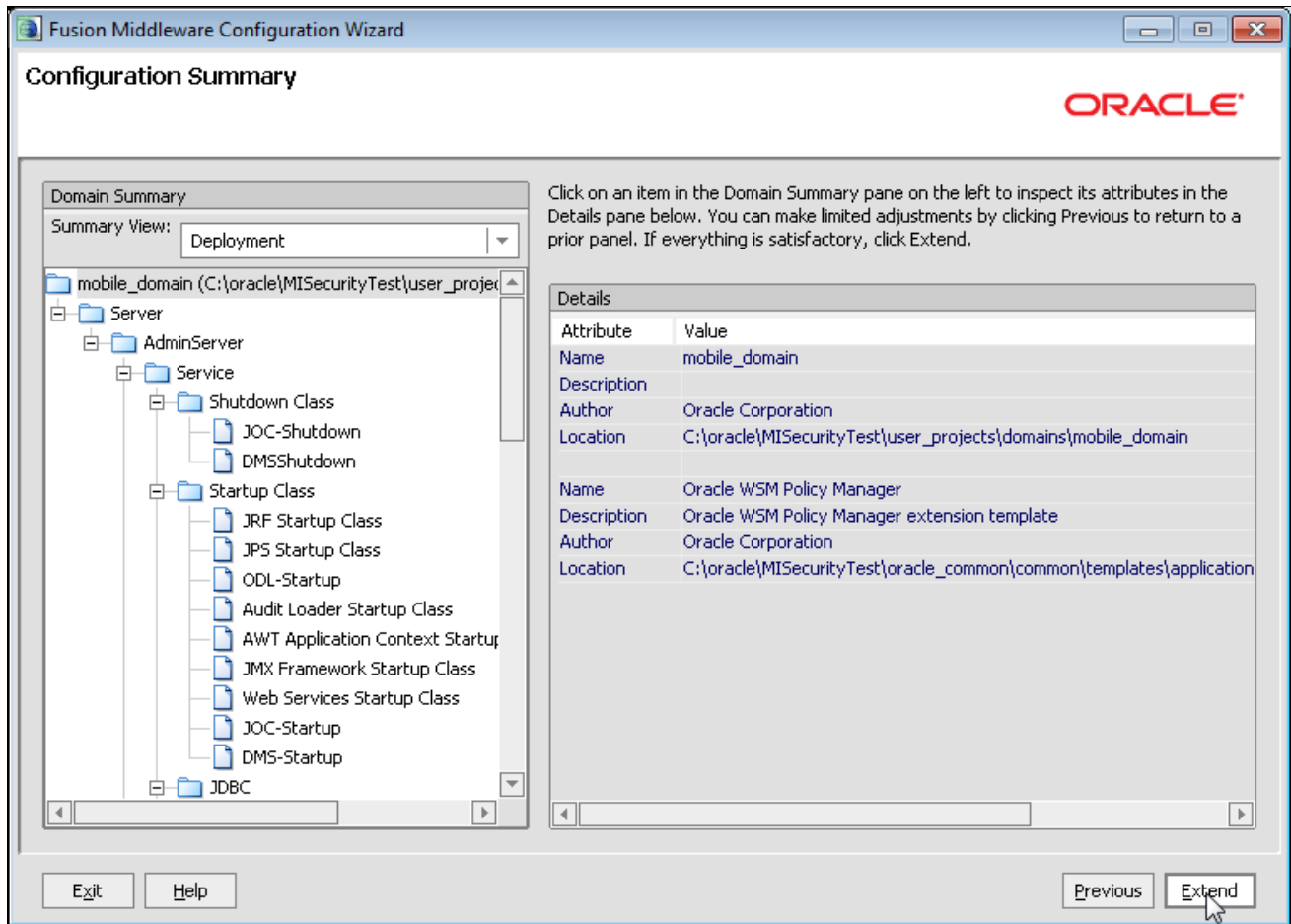
The Fusion Middleware Configuration Wizard - Select Optional Configuration page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Select Optional Configuration page

12. Leave the configuration check boxes clear (do not select) and click Next.

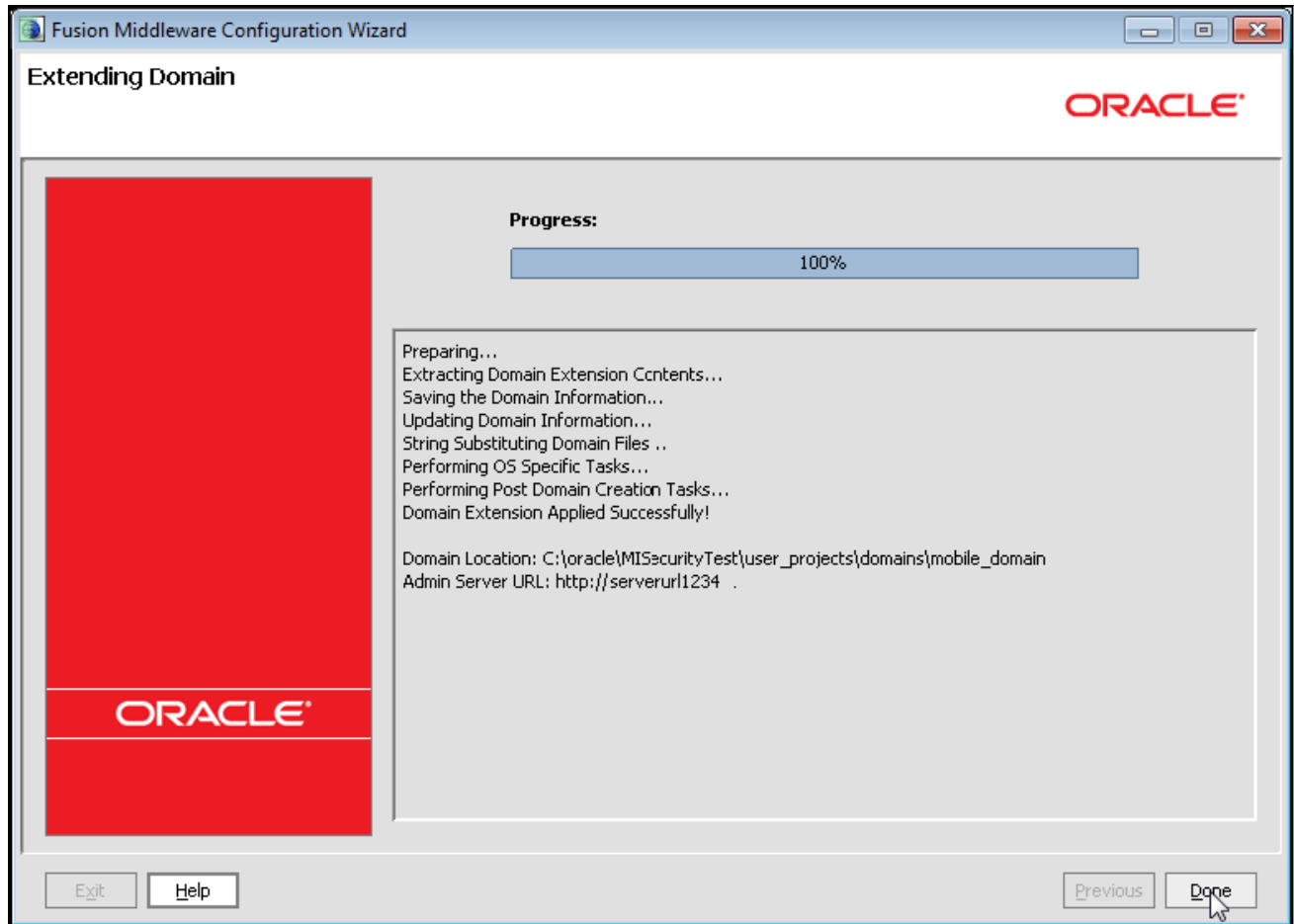
The Fusion Middleware Configuration Wizard - Configuration Summary page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Configuration Summary page

13. On the Configuration Summary page, verify the details of the domain and components that you selected for installation, and then click the Extend button to continue the installation.

The Fusion Middleware Configuration Wizard - Extending Domain Progress page appears, as shown in the following example:



Fusion Middleware Configuration Wizard - Extending Domain Progress page

The Extend Domain page shows the progress and details of the installation.

14. When the progress reaches 100%, click the Done button to complete the installation and exit the Configuration Wizard.

Task 21-1-3: Configuring the Certificates

This section discusses:

- Understanding Configuring the Certificates
- Creating the default-keystore.jks File on the Mobile Server
- Generating or Importing the Certificate into the Default-Keystore
- Exporting the mobileserv Public Key Certificate
- Importing the mobileserv Certificate into the Interop Keystore
- Generating the Encryption Keypair in the Interop Keystore

- Exporting the Encryption and Root Node Certificates
- Copying the Encryption and Root Certificate Files to the Mobile Server

Understanding Configuring the Certificates

Configuring the certificates between the PeopleSoft Mobile Inventory Management server and the PeopleSoft Integration Gateway involves populating keystores and generating public certificates that you copy between the servers.

Keytool is a utility that Oracle delivers with Java. The system uses this utility to manage the import and export of certificates from the keystores. You must have access to the Keytool utility from the Mobile Server Install and the PeopleSoft Install to continue with the installation.

Creating the default-keystore.jks File on the Mobile Server

The mobile system looks for credentials in the default-keystore.jks file that is in the subdirectory mobile-domain\config\fmwconfig. The system creates this file when importing the keypair.

If you do not have an x.509 certificate, you can generate one using the Keytool utility.

Note. Oracle does not recommend that you secure your production system with generated self-signed certificates.

In the instructions that follow, Oracle provides an alias name of *mobileserv* to the certificate. The system uses this alias when importing the certificate to the keystore on the PeopleSoft Gateway and when configuring SAML in the PeopleSoft security system. You can change this alias, just be aware that these installation instructions refer to the alias as *mobileserv*.

Generating or Importing the Certificate into the Default-Keystore

To generate or import the certificate into the default-keystore:

1. Run this step on the PeopleSoft Mobile Inventory Management server on the command line in the subdirectory:

```
mobile_domain\config\fmwcong
```

2. Do one of the following:

- If you have a keypair certificate from a certificate authority, you do not need to create a certificate in this step. Simply import your keypair certificate into the default-keystore.jks file.
- If you want to generate a self-signing certificate, run the following from the command line:

```
Keytool -genkey -alias mobileserv -keyalg RSA -dname "CN=[machine name],
OU=[Org Unit], O=[Org], L=[Location], ST=[2 letter abbreviation for
state], C=[2 letter abbrevication for country]" -keypass [password] -
keystore default-keystore.jks -storepass [password]
```

3. If you have a certificate, import your certificate into the default keystore using the *-import* option:

```
Keytool -importcert -alias mobileserv -file [certificate file] -keypass
[password] default-keystore.jks -storepass [password]
```

At this point in the installation, the system creates the default-keystore.jks file that contains the keypair certificate for the PeopleSoft Mobile Inventory Management server.

- Verify that the keystore is set up correctly by running the list command to see the contents of the keystore.

The following example shows the list command and the output identifying 1 entry, *mobileserv*:

```

C:\windows\system32\cmd.exe
C:\Oracle\10.3.6\user_projects\domains\mobile_domain\config\fmwconfig>C:\Oracle\
Java\bin\keytool -list -keystore default-keystore.jks -storepass welcome1

Keystore type: JKS
Keystore provider: SUN

Your keystore contains 3 entries
rootca, Sep 25, 2012, trustedCertEntry,
Certificate fingerprint (SHA1): 05:58:F8:FF:43:EA:74:48:9A:44:24:4A:9E:5C:72:19:
93:51:91:9C
mobileserv, Sep 25, 2012, PrivateKeyEntry,
Certificate fingerprint (SHA1): 3C:88:C4:64:6F:CE:42:70:91:DA:3F:A0:43:BA:CB:DA:
9A:69:49:4B
om920dv1, Sep 25, 2012, trustedCertEntry,
Certificate fingerprint (SHA1): DF:DA:7F:50:65:75:24:74:E6:AD:80:5F:BB:9E:77:3B:
64:9D:36:71

C:\Oracle\10.3.6\user_projects\domains\mobile_domain\config\fmwconfig>_

```

Command Window - Default-keystore.jks list

Exporting the mobileserv Public Key Certificate

To export the *mobileserv* public key certificate:

- Run this step on the PeopleSoft Mobile Inventory Management server on the command line in the following subdirectory:

```
mobile_domain\config\fmwcong
```

- To create the *mobileserv.cer* file, enter the following command:

```
Keytool -exportcert -v -alias mobileserv -keystore default-keystore.jks -
storepass [password] -rfc -file mobileserv.cer
```

- Copy the *mobileserv.cer* file to the following subdirectory:

```
PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes
```

This is the directory that contains the PeopleSoft keystore file *interop.jks* that Oracle delivers.

Importing the mobileserv Certificate into the Interop Keystore

To import the *mobileserv* certificate into the interop keystore:

- Run this step from the command line in the following subdirectory:

```
PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes
```

- Run the command to import the *mobileserv* certificate into the PeopleSoft keystore, *interop.jks*. The certificate should be in the file *mobileserv.cer* that you copied in step 3 of the preceding subtask ("Exporting the *mobileserv* Public Key Certificate").

```
Keytool -importcert -alias mobileserv -file mobileserv.cer -keystore [password]-keystore interop.jks -storepass interop
```

3. Click *Yes* to trust the certificate.

Generating the Encryption Keypair in the Interop Keystore

The encryption node keypair encrypts the public key information in the soap header. The alias name for the encryption key should be the same as the default local node for the PeopleSoft system.

To generate the encryption keypair in the interop keystore:

1. Run this step from the command line in the following subdirectory:

```
PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes
```

2. Run the following command:

```
keytool -genkeypair -alias [default local node name] -keyalg RSA -dname "CN=[machine name], OU=[Org Unit], O=[Org], L=[Location], ST=[2 letter abbreviation for state], C=[2 letter abbreviation for country]" -keystore interop.jks -storepass interop
```

At this point, the mobileserv and default local encryption certificates are in the interop.jks keystore.

- Verify that the import was successful by running the keystore `-list` command, as shown in the following example:

```

C:\windows\system32\cmd.exe
>C:\Oracle\Java\bin\keytool -list -keystore interop.jks -storepass interop

Keystore type: JKS
Keystore provider: SUN

Your keystore contains 11 entries

psft_cr, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): 14:06:B2:BD:CB:55:56:44:1C:55:79:DA:B7:BA:14:93:
F4:10:4B:99
wsdl_node, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): 32:E7:CE:7B:66:B8:15:24:47:5A:52:2D:77:B0:43:39:
93:81:97:CD
qe_ibtgt, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): 13:CC:3F:C2:56:77:F7:68:6C:CF:3C:22:A0:D0:F5:BB:
9D:83:BB:92
qe_local, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): 86:8E:4A:26:13:0A:AD:17:17:B9:E0:1C:DC:AD:71:8B:
08:E8:20:4F
psft_pa, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): 3F:E8:44:EB:2F:E2:92:C5:A9:D2:50:A1:28:D8:A3:E6:
61:67:A3:36
psft_hr, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): AB:82:84:68:D8:85:C2:4C:00:87:07:4F:40:9B:44:C3:
2D:12:0D:46
qe_securitynode, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): D6:87:FF:F3:2D:23:AD:89:25:39:0F:A3:CA:86:52:C8:
41:2D:42:E2
om920dvl, Sep 25, 2012, PrivateKeyEntry,
Certificate fingerprint (SHA1): DF:DA:7F:50:65:75:24:74:E6:AD:80:5F:BB:9E:77:3B:
64:9D:36:71
pt_local, May 9, 2011, PrivateKeyEntry,
Certificate fingerprint (SHA1): 5D:EC:1B:74:23:CC:28:A3:8C:64:DA:FB:F9:D7:14:06:
4F:89:A2:D5
mobileserv, Sep 25, 2012, trustedCertEntry,
Certificate fingerprint (SHA1): 3C:88:C4:64:6F:CE:42:70:91:DA:3F:A0:43:BA:CB:DA:
9A:69:49:4B
rootca, May 9, 2011, trustedCertEntry,
Certificate fingerprint (SHA1): 05:58:F8:FF:43:EA:74:48:9A:44:24:4A:9E:5C:72:19:
93:51:91:9C

```

Command Window - Keystore list command displaying the contents of interop.jks

Exporting the Encryption and Root Node Certificates

To export the encryption and root node certificates:

- Run this step from the command line in the following subdirectory:

```
PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes
```

- Export the public key and root certificate for encryption from the interop.jks keystore using the keytool `-exportcert` command, as follows:

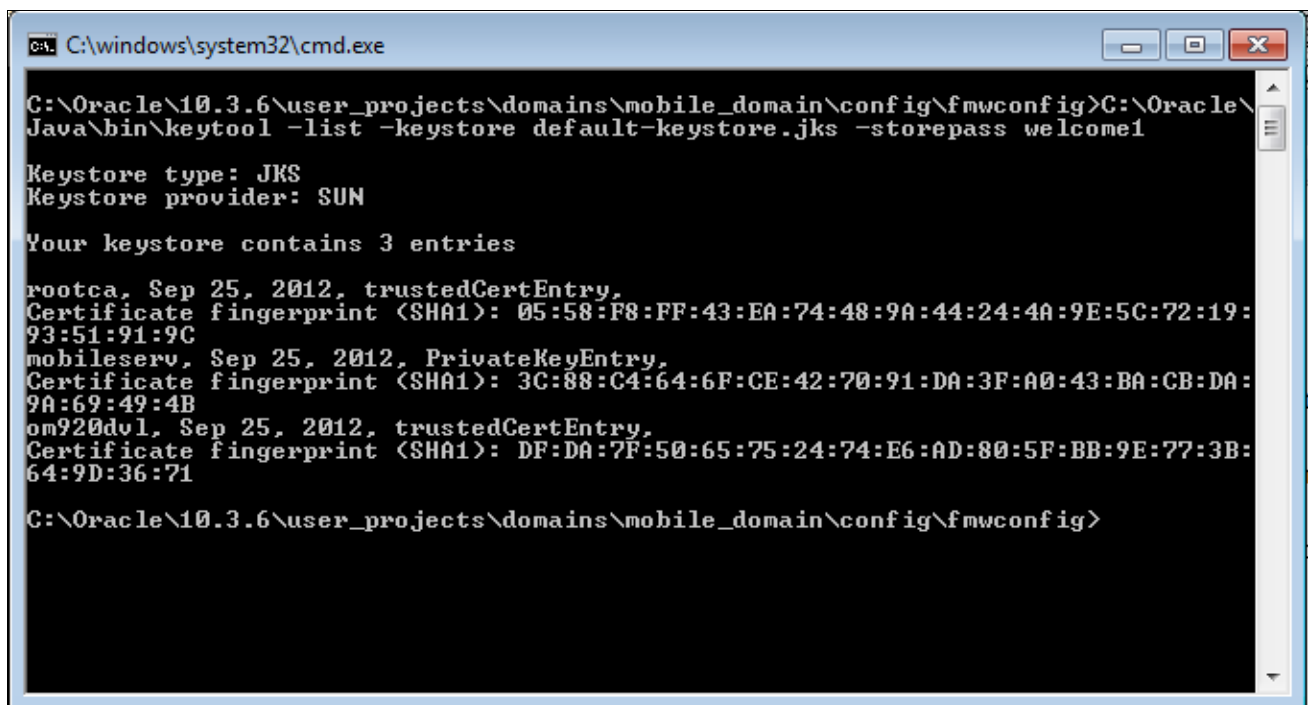
```
keytool -exportcert -v -alias rootca -keystore interop.jks -storepass
interop -rfc -file rootca.cer
```

```
keytool -exportcert -v -alias [default local node name] -keystore
interop.jks -storepass interop -rfc -file [default local node name].cer
```

Copying the Encryption and Root Certificate Files to the Mobile Server

To copy the encryption and root certificate files to the PeopleSoft Mobile Inventory Management server:

1. Run this step from the command line in the following subdirectory:
PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes
2. Copy the two certificate files to the following subdirectory:
mobile-domain\config\fmwconfig
3. Run the steps that follow on the PeopleSoft Mobile Inventory Management server on the command line in the following subdirectory:
mobile_domain\config\fmwcong
4. Run the following commands:
keytool -importcert -alias rootca -file rootca.cer-keystore default-keystore.jks -storepass [password]
Click *Yes* to trust this certificate.
keytool -importcert -alias [default local node name] -file [default local node name].cer -keystore default-keystore.jks -storepass [password]
Click *Yes* to trust this certificate.
5. Verify that the import was successful by running the keytool `-list` command, as shown in the following example:



```

C:\windows\system32\cmd.exe
C:\Oracle\10.3.6\user_projects\domains\mobile_domain\config\fmwconfig>C:\Oracle\Java\bin\keytool -list -keystore default-keystore.jks -storepass welcome1

Keystore type: JKS
Keystore provider: SUN

Your keystore contains 3 entries

rootca, Sep 25, 2012, trustedCertEntry,
Certificate fingerprint (SHA1): 05:58:F8:FF:43:EA:74:48:9A:44:24:4A:9E:5C:72:19:
93:51:91:9C
mobileserv, Sep 25, 2012, PrivateKeyEntry,
Certificate fingerprint (SHA1): 3C:88:C4:64:6F:CE:42:70:91:DA:3F:A0:43:BA:CB:DA:
9A:69:49:4B
om920dvl, Sep 25, 2012, trustedCertEntry,
Certificate fingerprint (SHA1): DF:DA:7F:50:65:75:24:74:E6:AD:80:5F:BB:9E:77:3B:
64:9D:36:71

C:\Oracle\10.3.6\user_projects\domains\mobile_domain\config\fmwconfig>

```

Command Window - List view of the default-keystore.jks

At this point, both keystores, the default-keystore.jks and interop.jks should contain the following three certificates:

- rootca

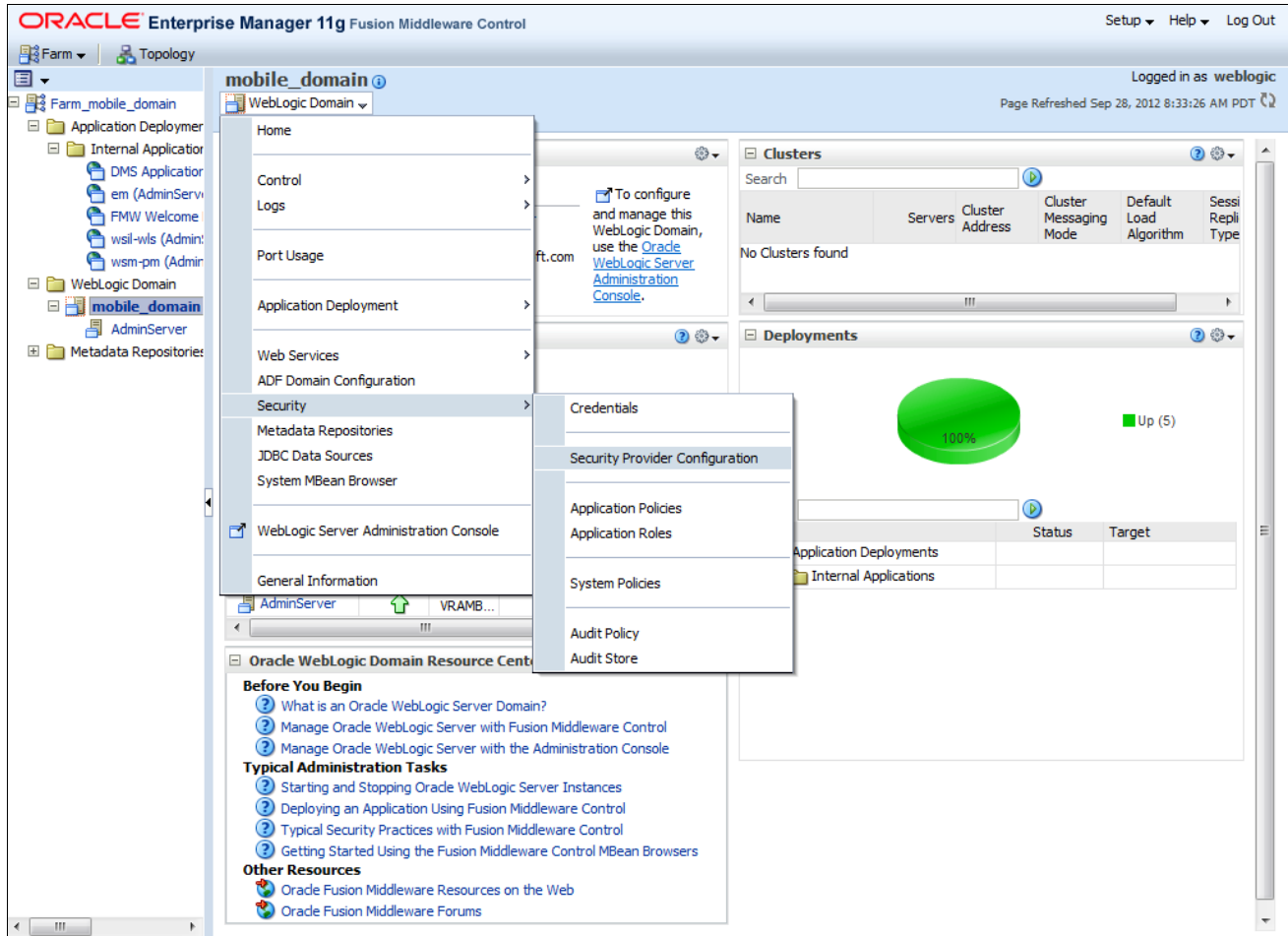
- mobileserv
- [default local node name]

Task 21-1-4: Creating and Configuring the Keystore and Credential Store

To create and configure the credential store on the PeopleSoft Mobile Inventory Management server:

1. Start the Oracle Enterprise Manager for the PeopleSoft Mobile Inventory Management server domain.

- From the Oracle Enterprise Manager menu, select WebLogic Domain, Security, Security Provider to access the Security Provider Configuration page, as the navigation shows in the following example:



Oracle Enterprise Manager - Farm Tree menu navigation to access the Security Provider Configuration page

The Oracle Enterprise Manager - Security Provider Configuration page appears, as shown in the following example:

ORACLE Enterprise Manager 11g Fusion Middleware Control Setup Help Log Out

Farm mobile_domain Topology

mobile_domain WebLogic Domain

Logged in as weblogic
Page Refreshed Sep 28, 2012 8:37:06 AM PDT

Security Provider Configuration

Use this page to configure global management domain policy and credential store providers, keystore and login modules used by Web Services Manager.

Security Stores

Current policy and credential store providers are shown below. To migrate the current policy and credential providers use the Change Store Type button.

Change Store Type Edit

Name	Store Type	Location
Policy Store		system-jazn-data.xml
Credential Store	File	cwallet.sso
Keystore		keystores.xml

Identity Store Provider

Web Services Manager Authentication Providers

You can configure the login modules and keystore for Web Services Manager authentication.

Login Modules

The following table lists all configured login modules for Web Services Manager. Use this list to create, configure or delete a login module.

Create... Edit... Delete...

Name	Class	Control Flag	Description
saml.loginmodule	oracle.security.jps.internal.jaas.module.saml.JpsSAMLLoginMod...	Required	SAML Login Module
saml2.loginmodule	oracle.security.jps.internal.jaas.module.saml.JpsSAML2LoginMo...	Required	SAML2 Login Module
krb5.loginmodule	com.sun.security.auth.module.Krb5LoginModule	Required	Kerberos Login Module
digest.authenticator.I...	oracle.security.jps.internal.jaas.module.digest.DigestLoginMod...	Required	Digest Authenticator Lo...
certificate.authenticat...	oracle.security.jps.internal.jaas.module.x509.X509LoginModule	Required	X509 Certificate Login M...
wss.digest.loginmodule	oracle.security.jps.internal.jaas.module.digest.WSSDigestLogin...	Required	WSS Digest Login Module
user.authentication.lo...	oracle.security.jps.internal.jaas.module.authentication.JpsUser...	Required	User Authentication Logi...
user.assertion.loginm...	oracle.security.jps.internal.jaas.module.assertion.JpsUserAsse...	Required	User Assertion Login Mo...

Keystore

Use this section to specify the keystore used to store public and private keys for all secure connections within the WebLogic Domain. Configure...

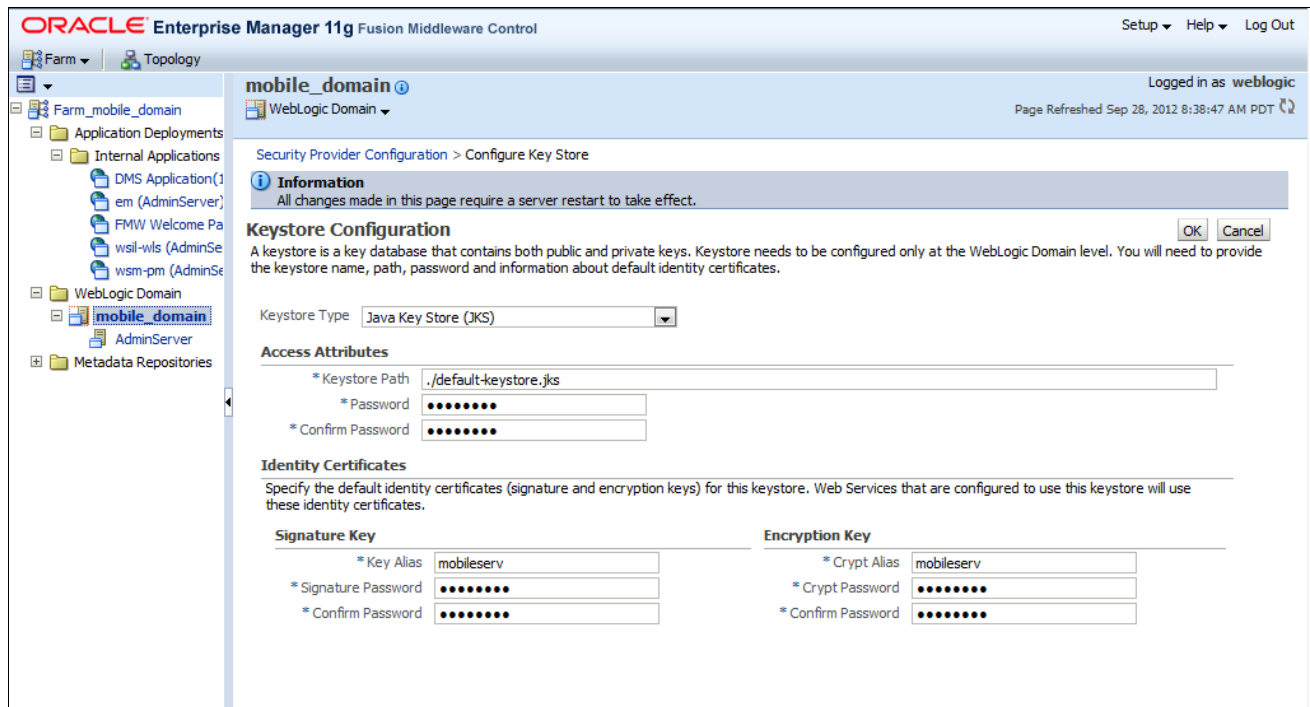
Type JKS
Path ./default-keystore.jks

Single Sign-On Provider

Advanced Properties

Oracle Enterprise Manager - Security Provider Configuration page

3. On the Security Provider Configuration page, expand the Keystore section and click the Configure button. The Oracle Enterprise Manager - Keystore Configuration page appears, as shown in the following example:

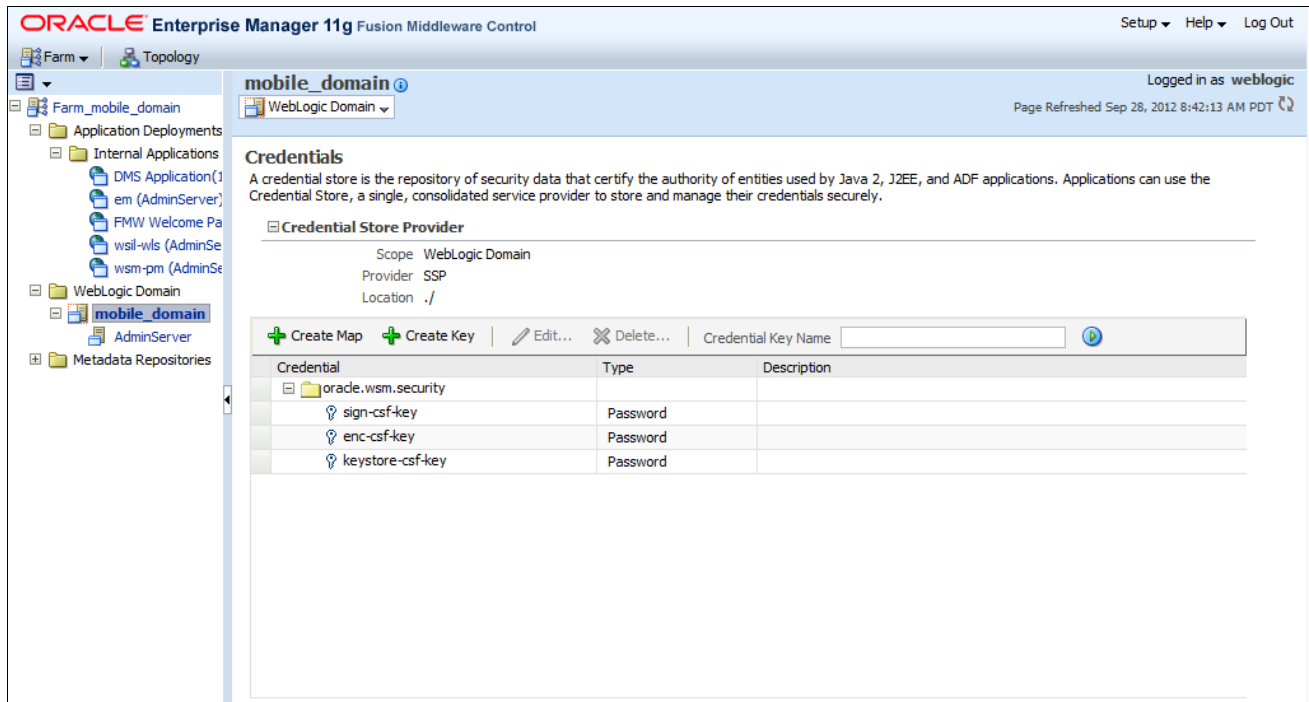


Oracle Enterprise Manager - Keystore Configuration page

4. On the Keystore Configuration page, do the following:
- In the Keystore Type field, select *Java Key Store (JKS)* from the drop-down list box.
 - In the Keystore Path, enter *./default-keystore.jks*.
The signature and encryption key should be *mobileserv*.
 - In the Password field, enter the password to create the keystore in previous steps.
The appropriate passwords used to import the certificates should be provided.

5. Access the Credentials page by selecting the domain, then from the menu select Security, Credential.

The Oracle Enterprise Manager - Credentials page appears displaying the Credential Store information, as shown in the following example:

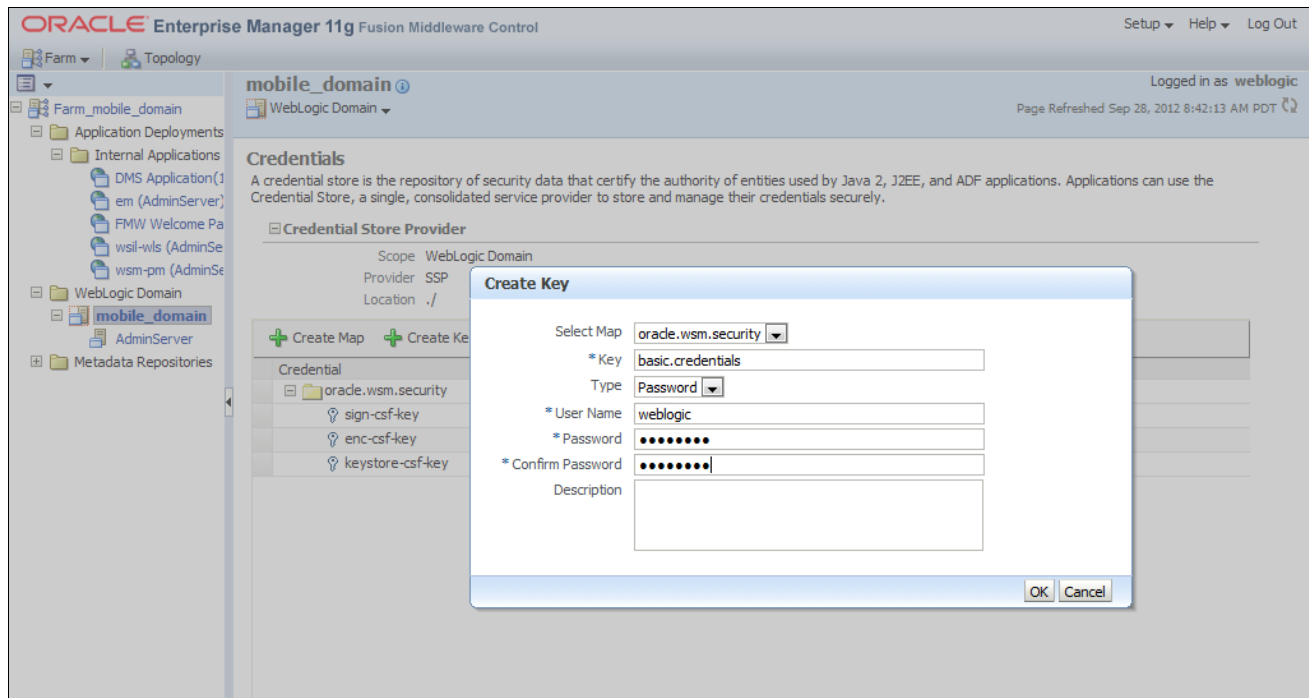


Oracle Enterprise Manager - Credentials page

6. On the Credentials Store page, notice that the oracle.wsm.security credential was created as part of the keystore configuration in the previous step.

- Click the +Create Key button to create a new key.

The Create Key dialog box appears, as shown in the following example:



Oracle Enterprise Manager - Credentials page: Create Key dialog box

- In the Create Key dialog box, do the following:
 - In the Key field, enter *basic.credentials*.
 - In the User Name field, enter *weblogic*.
 - In the Password field, enter a password.
 - In the Confirm Password field, enter the password again for confirmation.
 - Click OK.
- Restart the PeopleSoft Mobile Inventory Management server for your changes to take effect.

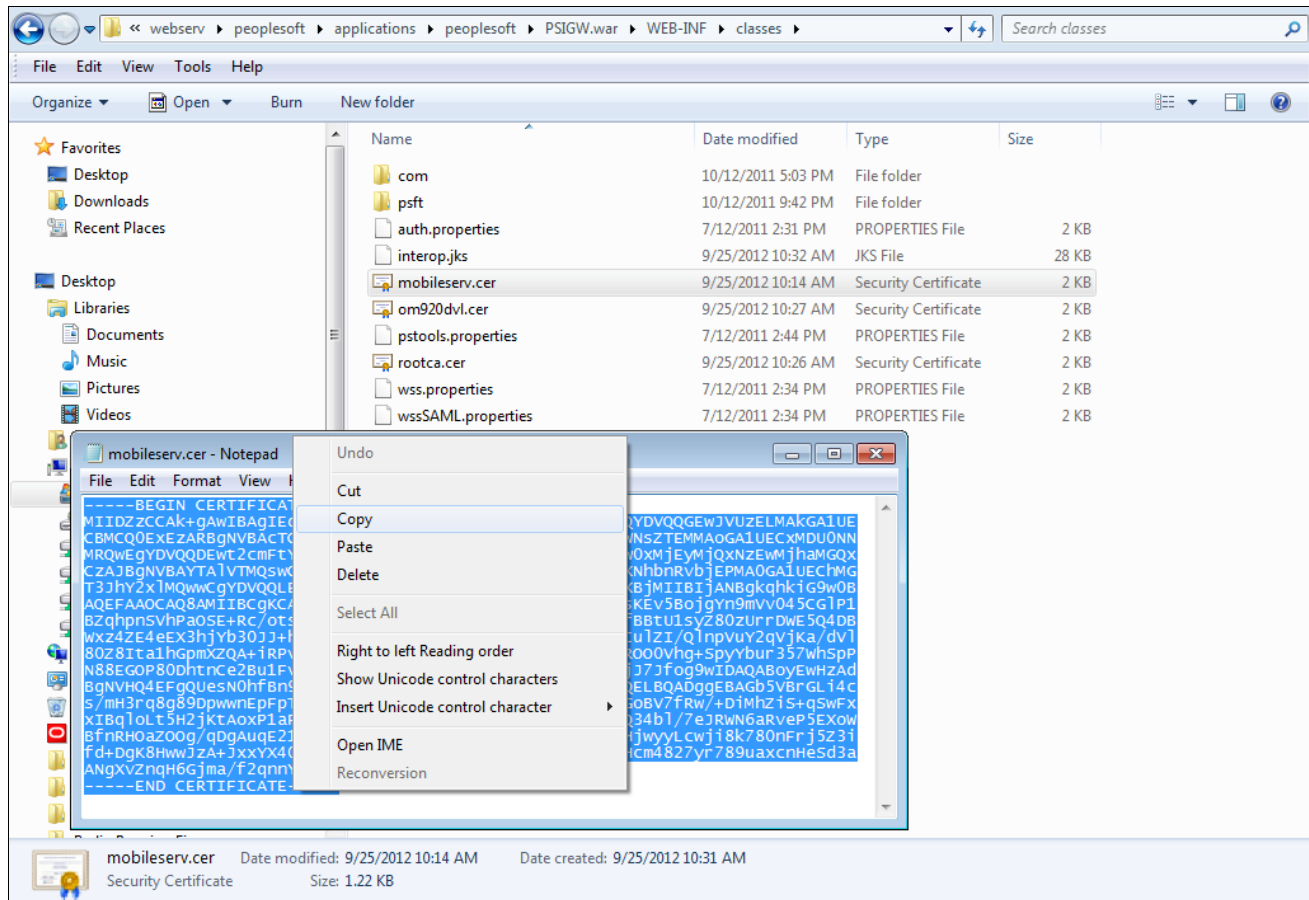
Task 21-1-5: Adding the SAML Definition Information to the PeopleSoft System

To add the SAML definition information to the PeopleSoft system:

1. Locate the mobileserv.cer file in the following subdirectory:

PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes

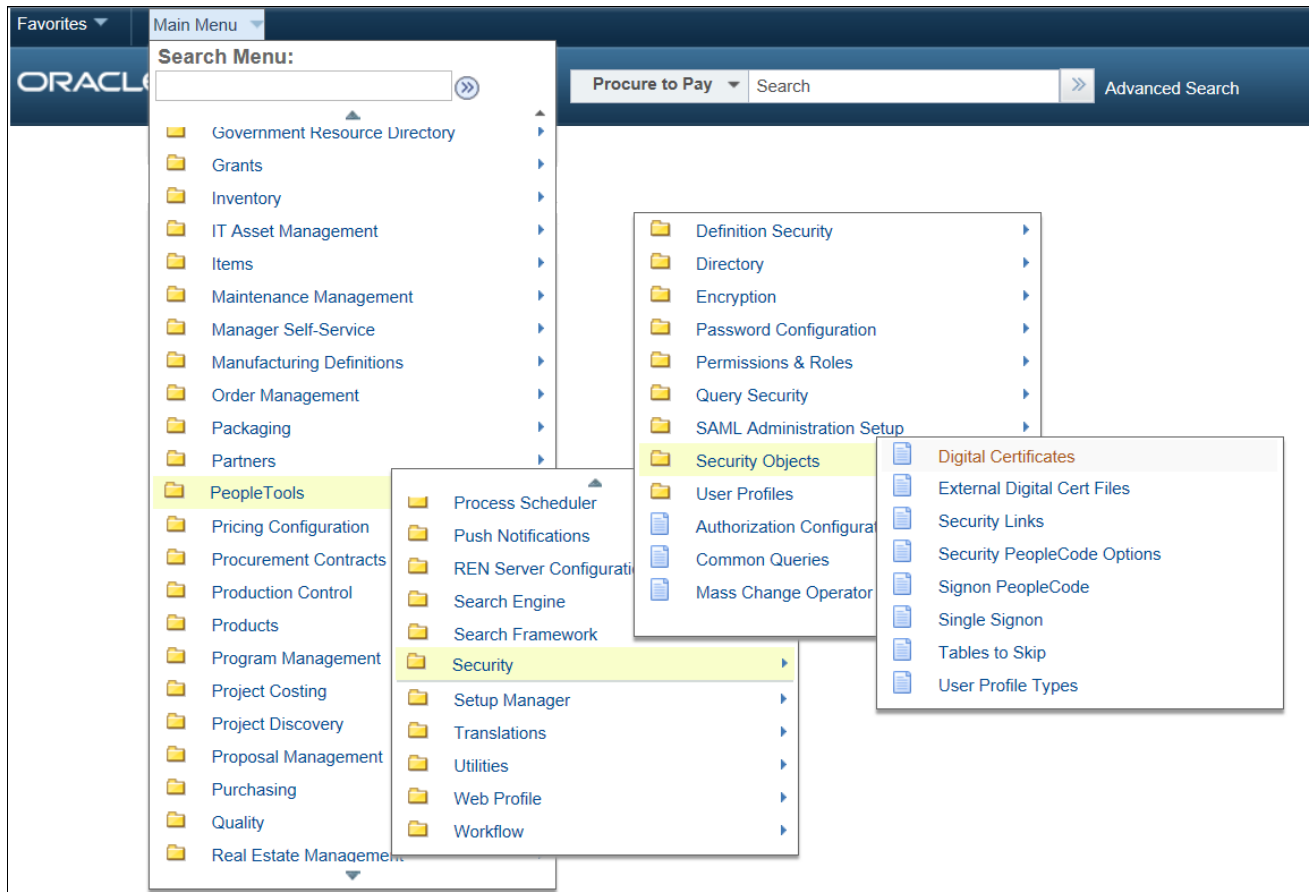
For the next few steps, refer to the following example that shows the navigation to the mobileserv.cer file and the digital certificate in a text editor:



PeopleSoft - Navigation to mobileserv.cer file and digital certificate open and highlighted in text editor

2. Using a text editor, open the mobileserv.cer file.
3. In the text editor, highlight the certificate and copy it to the clipboard.

- Log on to the PeopleSoft system and access the digital certificate page by selecting PeopleTools, Security, Security Objects, Digital Certificates, as shown in the following navigation example:



PeopleSoft system - Navigation to digital certificate

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

[Favorites](#) > [Main Menu](#) > [PeopleTools](#) > [Security](#) > [Security Objects](#) > [Digital Certificates](#)


[Add To](#) ▾

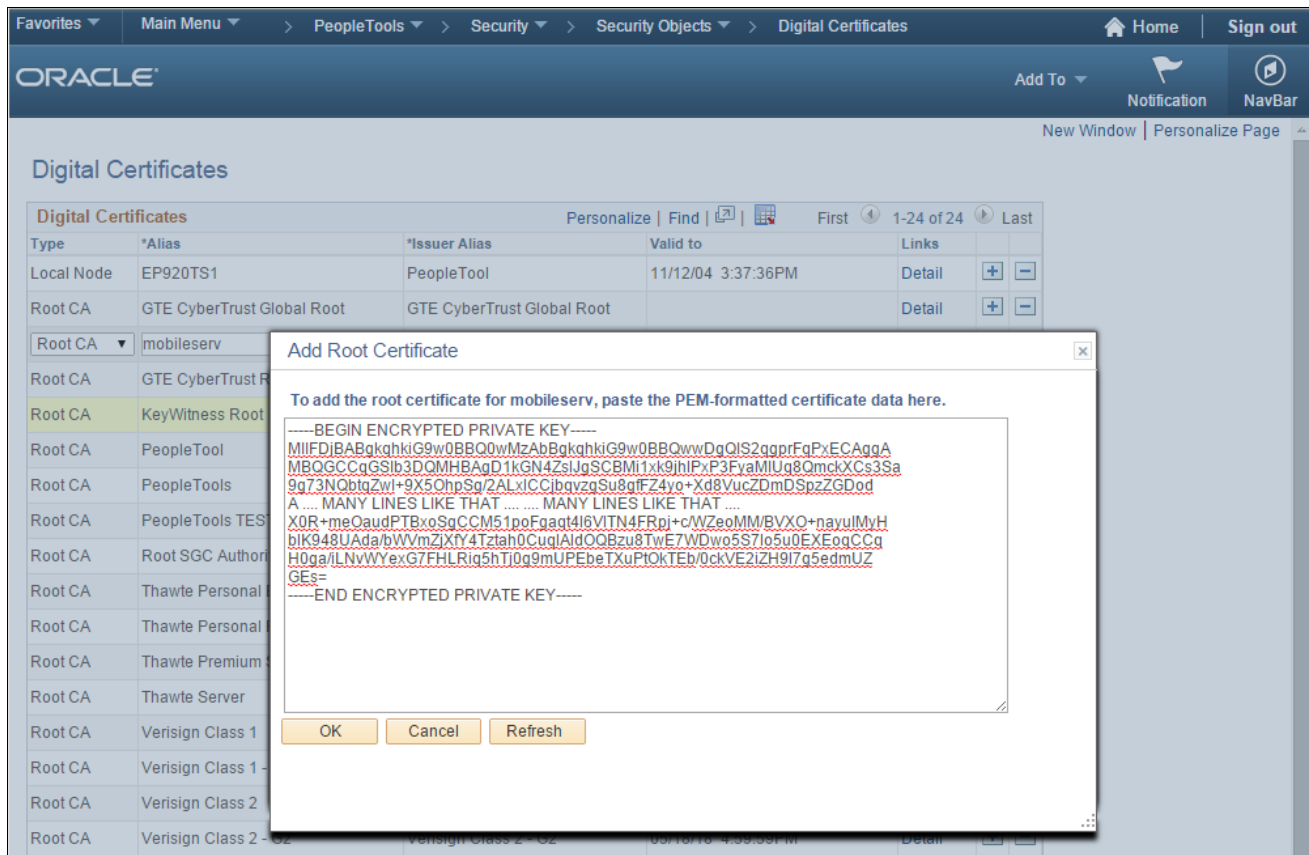
Digital Certificates

Digital Certificates				Personalize	Find	First	1-24 of 24	Last
Type	*Alias	*Issuer Alias	Valid to	Links				
Local Node	EP920TS1	PeopleTool	11/12/04 3:37:36PM	Detail + -				
Root CA	GTE CyberTrust Global Root	GTE CyberTrust Global Root		Detail + -				
Root CA ▾	<input type="text" value="mobileserv"/>	mobileserv		Add Root + -				
Root CA	GTE CyberTrust Root	GTE CyberTrust Root		Detail + -				
Root CA	KeyWitness Root	KeyWitness Root		Detail + -				
Root CA	PeopleTool	PeopleTool	03/10/05 1:12:35PM	Detail + -				
Root CA	PeopleTools	PeopleTools		Detail + -				

PeopleSoft Digital Certificates page

5. On the Digital Certificates page, click the Add (+) button to add a new certificate.
6. Add the mobileserv digital certificate RootCA.

7. Click the Add Root link to access the Add Root Certificate page, as shown in the following example:



PeopleSoft Digital Certificates - Add Root Certificate page

8. Paste the contents of the clipboard into the dialog area and click OK.

- Click the Refresh button to save the entry.

The system returns you to the Digital Certificates page, as shown in the following example:

Digital Certificates					Personalize	Find	First	1-25 of 25	Last
Type	*Alias	*Issuer Alias	Valid to	Links					
Local Node	EP920TS1	PeopleTool	11/12/04 3:37:36PM	Detail	+	-			
Root CA	GTE CyberTrust Global Root	GTE CyberTrust Global Root		Detail	+	-			
Root CA	GTE CyberTrust Root	GTE CyberTrust Root		Detail	+	-			
Root CA	KeyWitness Root	KeyWitness Root		Detail	+	-			
Remote	mobileserv	mobileserv		Import	+	-			
Root CA	PeopleTool	PeopleTool	03/10/05 1:12:35PM	Detail	+	-			
Root CA	PeopleTools	PeopleTools		Detail	+	-			
Root CA	PeopleTools TEST root CA	PeopleTools TEST root CA	11/20/23 9:36:28AM	Detail	+	-			
Root CA	Root SGC Authority	Root SGC Authority	12/31/09 11:00:00PM	Detail	+	-			
Root CA	Thawte Personal Basic	Thawte Personal Basic	12/31/20 3:59:59PM	Detail	+	-			
Root CA	Thawte Personal Premium	Thawte Personal Premium	12/31/20 3:59:59PM	Detail	+	-			
Root CA	Thawte Premium Server	Thawte Premium Server	12/31/20 3:59:59PM	Detail	+	-			

PeopleSoft Digital Certificates page

- On the Digital Certificates page, click the Add (+) button to add a new certificate.

This certificate will be remote.

- Click the Detail link next to the remote certificate and copy the contents of the clipboard into the text area for the remote certificate.

At this point, the PeopleSoft system identifies the remote certificate mobileserv and defines the RootCA as well.

The example here assumes a self-signed certificate. If the certificate that you are using was issued by a certificate authority, then the RootCA should point to the appropriate root.

12. Select PeopleTools, Security, SAML Administration Setup, SAML Inbound Setup to access the Security Assertion Markup Language (SAML) Inbound Setup page, as shown in the following example:

The screenshot shows the Oracle PeopleSoft SAML Inbound Setup page. The breadcrumb trail is: Favorites > Main Menu > PeopleTools > Security > SAML Administration Setup > SAML Inbound Setup. The page title is "Security Assertion Markup Language [SAML] Inbound Setup." The form contains the following fields:

- *Certificate Alias: mobileserv
- *Active Flag: A
- *Issuer: WWW.ORACLE.COM
- *SubjectName: VP1
- *QualifierName: WWW.ORACLE.COM
- *Mapping Peoplesoft UserID: DVP1
- Long Description: WS Security Setup

At the bottom of the form, there are buttons for Save, Notify, Add, and Update/Display.

PeopleSoft Security Assertion Markup Language (SAML) Inbound Setup page

13. On the Security Assertion Markup Language (SAML) Inbound Setup page, add a new entry for the PeopleSoft Mobile Inventory Management server certificate.

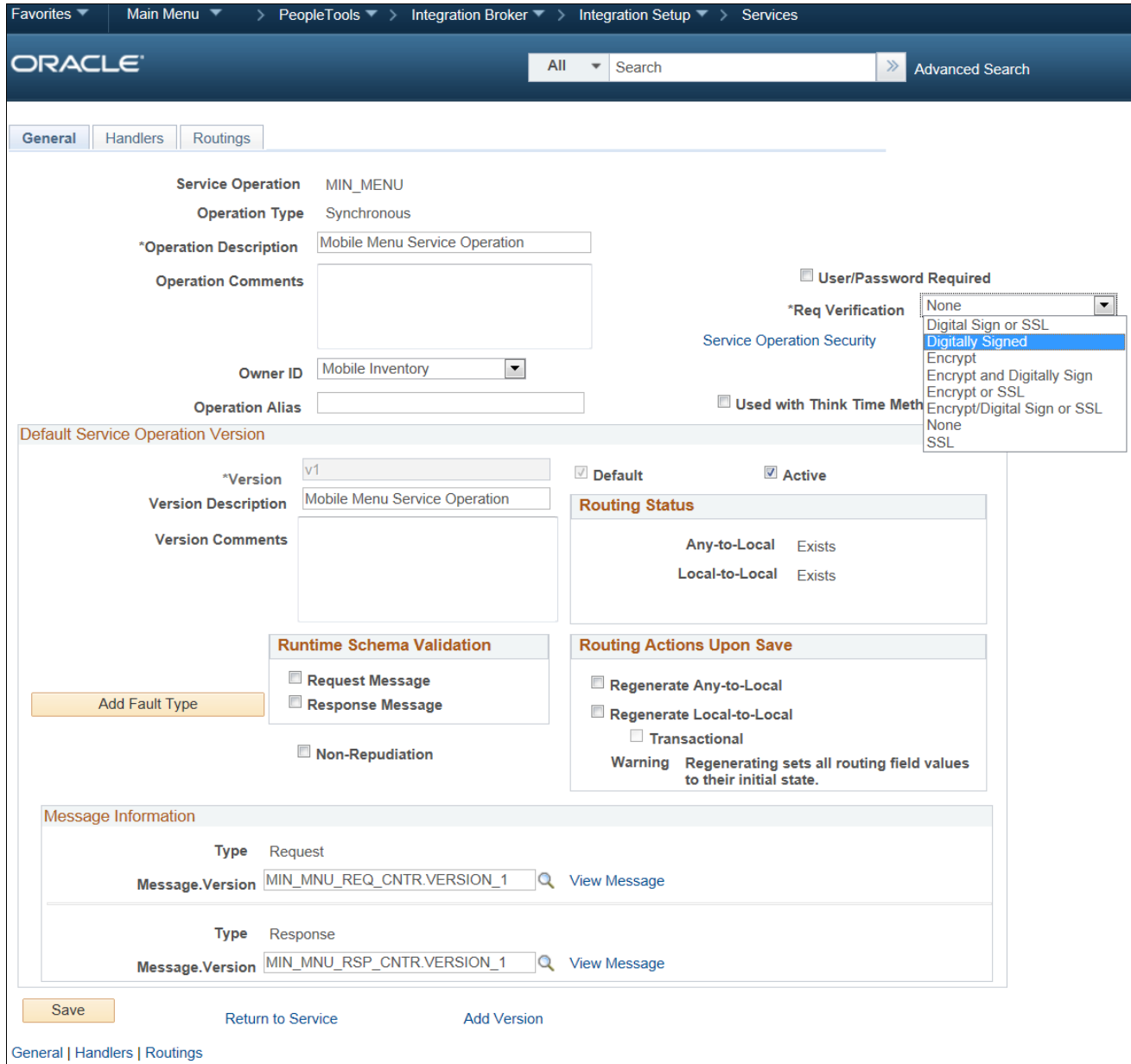
The issuer defaults on the PeopleSoft Mobile Inventory Management web server as `www.oracle.com` and did not change.

14. In the SubjectName field, enter a user of the Mobile system.

You must add a new entry for each mobile user.

15. In the Mapping PeopleSoft UserID field, enter the same user of the Mobile system that you entered in the preceding step.

16. To enforce policies (optional), select PeopleTools, Integration Broker, Integration Setup, Services to access the Service Operations - General page, as shown in the following example:



PeopleSoft Service Operations - General page

Enforcing policies on the PeopleSoft side is done at the service operation. This is an optional step that you can perform to better secure your environment.

17. Open the service operation and in the Req Verification field, select the appropriate policy enforcement from the drop-down list box.

For example: *Digitally Signed*

18. Select PeopleTools, Integration Broker, Integration Setup, Nodes to access the WS Security page, as shown in the following example:

PeopleSoft Nodes - WS Security page

19. On the Nodes - WS Security page, select SAML Token from the Authentication Token Type drop-down list box.

This changes the Anonymous Node to identify the SAML Token Authentication Type. This is applied to all web services. Alternatively, you can do this at the routing level for each web service with SAML Authentication Type.

20. Modify the wssSAML.properties file that is in the following subdirectory:
PSHome\webserv\peoplesoft\applications\peoplesoft\PSIGW.war\WEB-INF\classes

Change the Issuer and subjectNameID.qualifier to www.oracle.com, as shown in the following example:

```
org.apache.ws.security.saml.issuerClass=com.peoplesoft.pt.security.wss.action.PSSAMLIssuerImpl
org.apache.ws.security.saml.issuer=www.oracle.com
org.apache.ws.security.saml.subjectNameID.qualifier=www.oracle.com
org.apache.ws.security.saml.authenticationMethod=password
org.apache.ws.security.saml.confirmationMethod=senderVouches
```

wssSAML.properties file

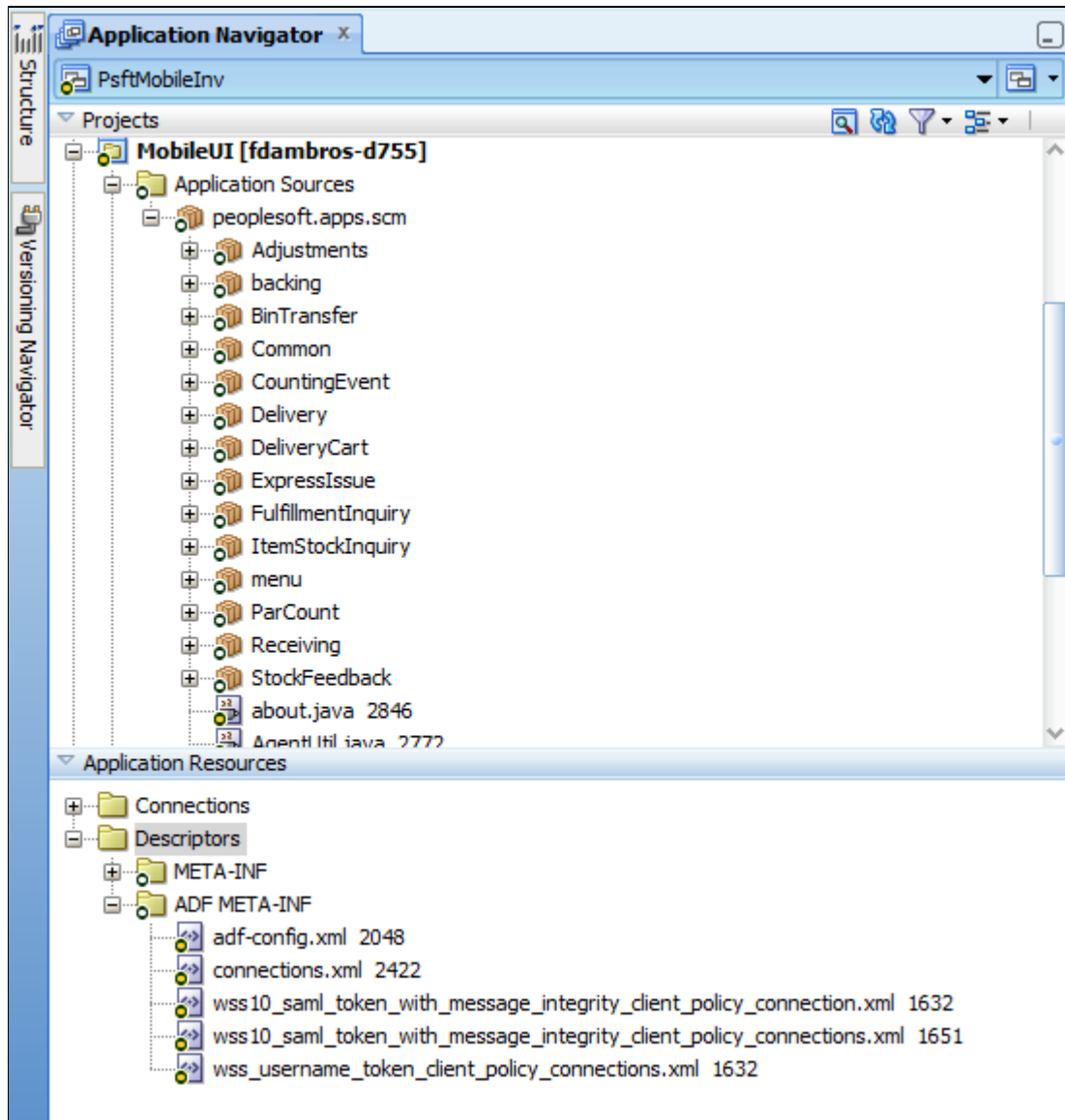
Task 21-1-6: Updating the connections.xml to Enforce Security Policies

You can only perform this step *after* you create a customization environment that you base on the source files that Oracle delivers. If you have not already done so, follow the instructions in the chapter titled "Creating and Deploying a Customization Environment for PeopleSoft Mobile Inventory Management" to create this environment, then return here and proceed with this step.

Oracle delivers the connections.xml file without any security policies. You can update the connections.xml file in the PeopleSoft Mobile Inventory Management application to include client security policies.

To update the connections.xml to enforce security policies:

1. Open the PeopleSoft Mobile Inventory Management application in JDeveloper, and then open the Application Resources section and expand the Descriptors and ADF META-INF sections, as shown in the following example:



PeopleSoft Mobile Inventory Management - Navigation to locate the connections.xml file

To add WS-Security to the PeopleSoft Mobile Inventory Management application, you must attach a security policy to each service.

- Determine which policy you want to use, then double-click the connections file to open.

The file should open as shown in the following example:

```

<?xml version = '1.0' encoding = 'UTF-8' ?>
<References xmlns="http://xmlns.oracle.com/adf/jndi">
  <Reference name="MIN_COUNTING_EVENT_SET"
    className="oracle.adf.model.connection.webservice.impl.WebServiceConnectionImpl"
    xmlns="">
    <Factory className="oracle.adf.model.connection.webservice.api.WebServiceConnectionFactory"/>
  </Reference>
</References>
<RefAddresses>
  <XmlRefAddr addrType="WebServiceConnection">
    <Contents>
      <wsconnection description="http://machineNamePort/PSIGW/PeopleSoftServiceListeningConnector/PSFT_EP/MIN_COUNTING_EVENT_SET"
        service="{http://xmlns.oracle.com/Enterprise/FSCM/service/MIN_COUNTING_EVENT_SET.1}MIN_COUNTING_EVENT_SET"
        <model name="{http://xmlns.oracle.com/Enterprise/FSCM/service/MIN_COUNTING_EVENT_SET.1}MIN_COUNTING_EVENT_SET"
          xmlns="http://xmlns.oracle.com/ws/model">
          <service name="{http://xmlns.oracle.com/Enterprise/FSCM/service/MIN_COUNTING_EVENT_SET.1}MIN_COUNTING_EVENT_SET"
            <port name="MIN_COUNTING_EVENT_SET_Port"
              binding="{http://xmlns.oracle.com/Enterprise/FSCM/service/MIN_COUNTING_EVENT_SET.1}MIN_COUNTING_EVENT_SET"
              <policy-references xmlns="http://xmlns.oracle.com/adf">
                <policy-reference category="security"
                  uri="oracle/wss10_saml_token_with_message_integrity_client_policy"
                  enabled="true"
                  id="oracle/wss10_saml_token_with_message_integrity_client_policy"
                  xmlns="" />
              </policy-references>
            <soap addressUri="http://machineNamePort/PSIGW/PeopleSoftServiceListeningConnector/PSFT_EP"
              xmlns="http://schemas.xmlsoap.org/wsdl/soap/" />
            <operation name="MIN_COUNTING_EVENT_SET">
              <soap soapAction="MIN_COUNTING_EVENT_SET.v1"
                xmlns="http://schemas.xmlsoap.org/wsdl/soap/" />
              <input name="MIN_COUNTING_EVENT_SET_REQ.V1"/>
              <output name="MIN_COUNTING_EVENT_SET_RSP.V1"/>
            </operation>
          </model>
        </wsconnection>
      </Contents>
    </XmlRefAddr>
  </RefAddresses>
</RefAddresses>

```

Example of connections.xml file

- Select the entire content of the file using Ctrl-A or Select All from the Edit menu. Then copy the content into the clipboard (Ctrl-C or Copy from the Edit menu).
- Double-click the connections.xml file to open. Then select the entire content of the file (Ctrl-A or Select All from the Edit menu). Paste the content of the clipboard into this file, entirely replacing the content (Ctrl-V or Paste from the Edit menu).
- Save the file.
- After you make these changes, you must redeploy the PeopleSoft Mobile Inventory Management system to the web server that you previously configured in the installation.

Note. In the future, when you receive new source file updates, the connections.xml file may be overwritten. Repeat these steps to reinstate the correct security policy.

Chapter 22

Creating and Deploying a Customization Environment for PeopleSoft Mobile Inventory Management

This chapter discusses:

- Understanding the Customization Environment for PeopleSoft Mobile Inventory Management
- Prerequisites
- Creating a Customization Environment for PeopleSoft Mobile Inventory Management

Understanding the Customization Environment for PeopleSoft Mobile Inventory Management

The PeopleSoft Mobile Inventory Management application is built using Oracle Application Development Framework (ADF). Oracle ADF uses a customization methodology that you should follow when making customizations to the PeopleSoft Mobile Inventory Management application. Oracle's methodology implements customizations in a way that does not change the source files. Therefore, Oracle can deliver future updates to the original source files without requiring you to reapply the customizations.

Prerequisites

Before you begin, ensure that you meet the following requirements:

- You have access to the source files that Oracle delivers. These source files are in the file PsftMobileInvCustom.zip.
This file is in the directory *PS_APP_HOME*\setup\oracle\adf\MobileInventory.
- You have access to the latest version of Oracle JDeveloper 11gR1 (11.1.1.6 or 11.1.1.7)

Note. Oracle JDeveloper 11gR2 is not yet supported.

Task 22-1: Creating a Customization Environment for PeopleSoft Mobile Inventory Management

This section discusses:

- Creating the Customization Environment

- Creating the Customization EAR File

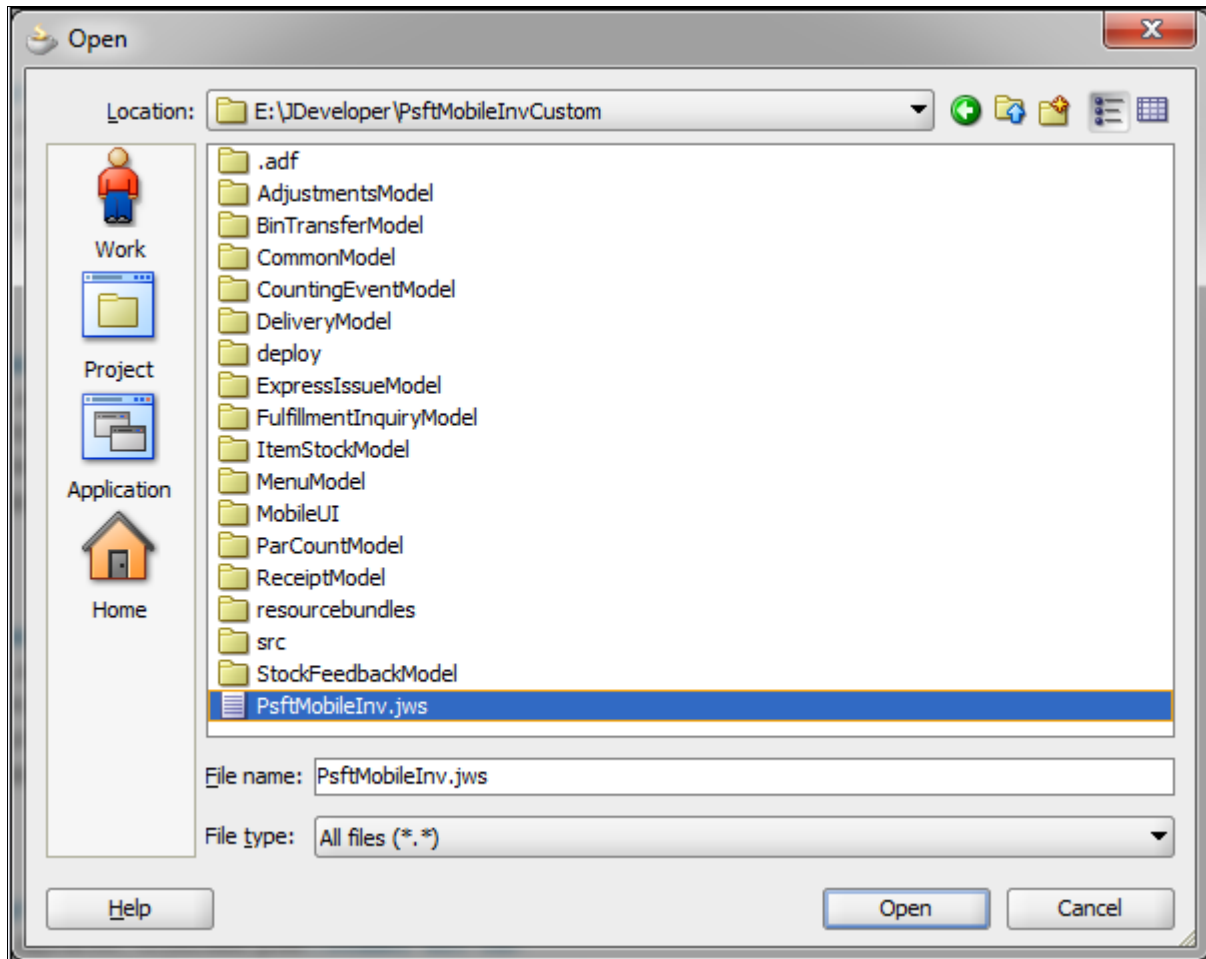
Task 22-1-1: Creating the Customization Environment

To create an environment to customize, you must unzip the source files into a directory of your choice. After you unzip the source files, you can open the application in Oracle JDeveloper using the steps that follow.

To create the customization environment:

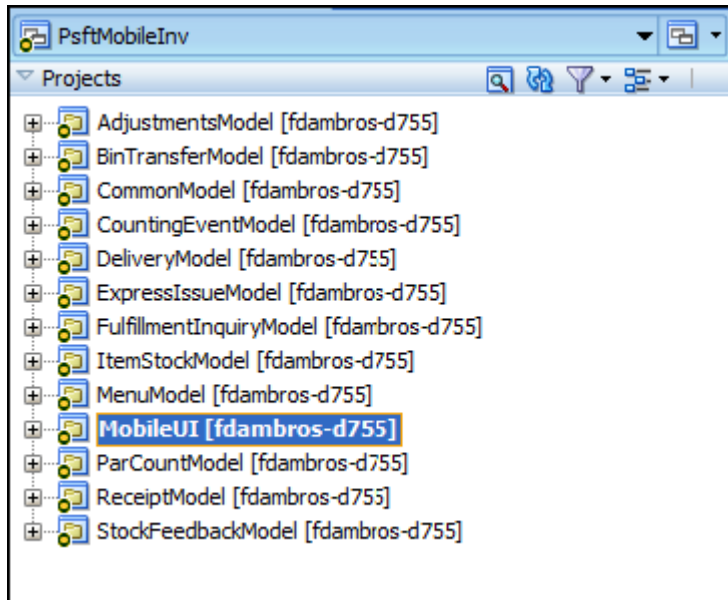
1. In Oracle JDeveloper, select File, Open.

2. In the Open Applications dialog box, look for your source directory, open the PsftMobileInvCustom directory and select the PsftMobileInv.jws file, as shown in the following example:



Open Applications dialog box

The PeopleSoft Mobile Inventory Management application now appears in the Application Navigator, as shown in the following example:



Application Navigator

You can now use the connections.xml file to make customizations.

3. After you create the customization environment, the process changes slightly for subsequent source files that Oracle delivers. You still unzip the application files to the same directory; however, one of the files requires special treatment.

Oracle delivers the connections.xml file without any security association. In an earlier step in the chapter titled "Installing PeopleSoft 9.2 Mobile Inventory Management" of this installation guide, you are instructed to replace the generic connections file with one that is specific to your security setup. When you unzip the source files after the initial setup, the specific connections file that you specified in that step is overwritten by the generic file. Therefore, you need to replace the generic file with the specific security file that you are using.

The detailed instructions for this procedure are in the chapter titled "Configuring WS-Security for PeopleSoft Mobile Inventory Management" of this installation guide.

See the section Updating the connections.xml to Enforce Security Policies in the chapter "Configuring WS-Security for PeopleSoft Mobile Inventory Management."

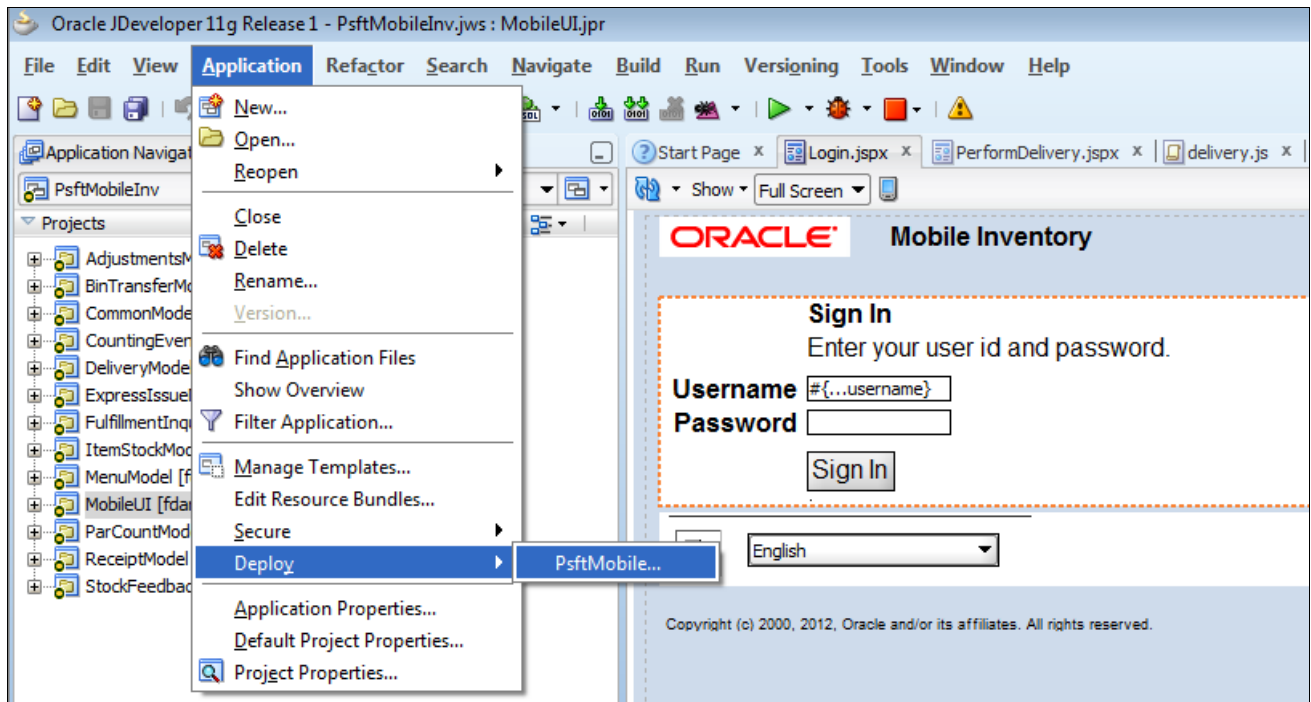
Task 22-1-2: Creating the Customization EAR File

After you make the changes in the previous step, you must redeploy the customizations for the changes to take effect. To deploy the customized version, you must create an EAR file of the custom application.

To create an EAR file of the custom application for deploying to the application server:

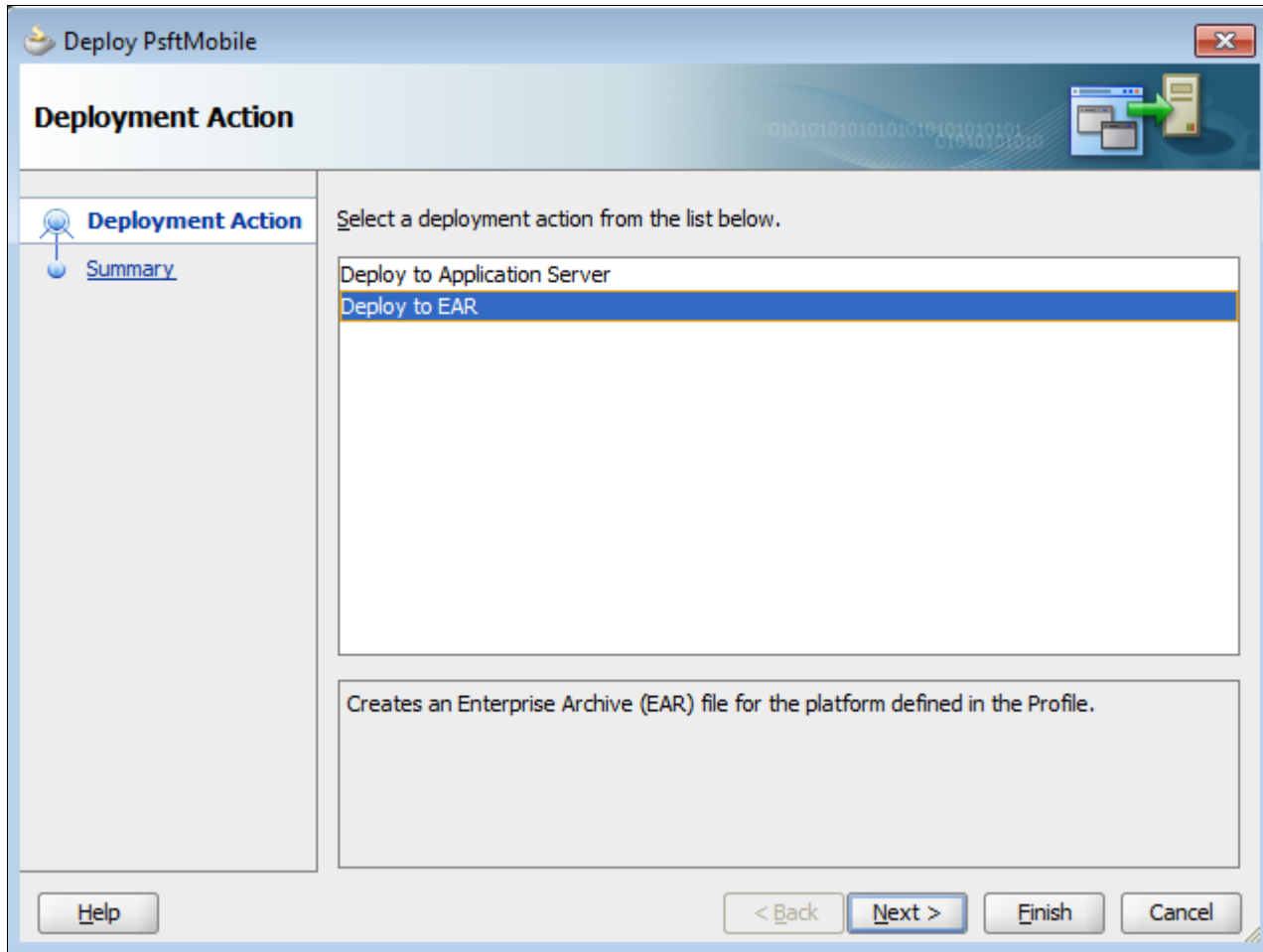
1. Start with the customized application open in Oracle JDeveloper.

- From the Oracle JDeveloper menu, select Application, Deploy, as shown in the following example:



Oracle JDeveloper menu

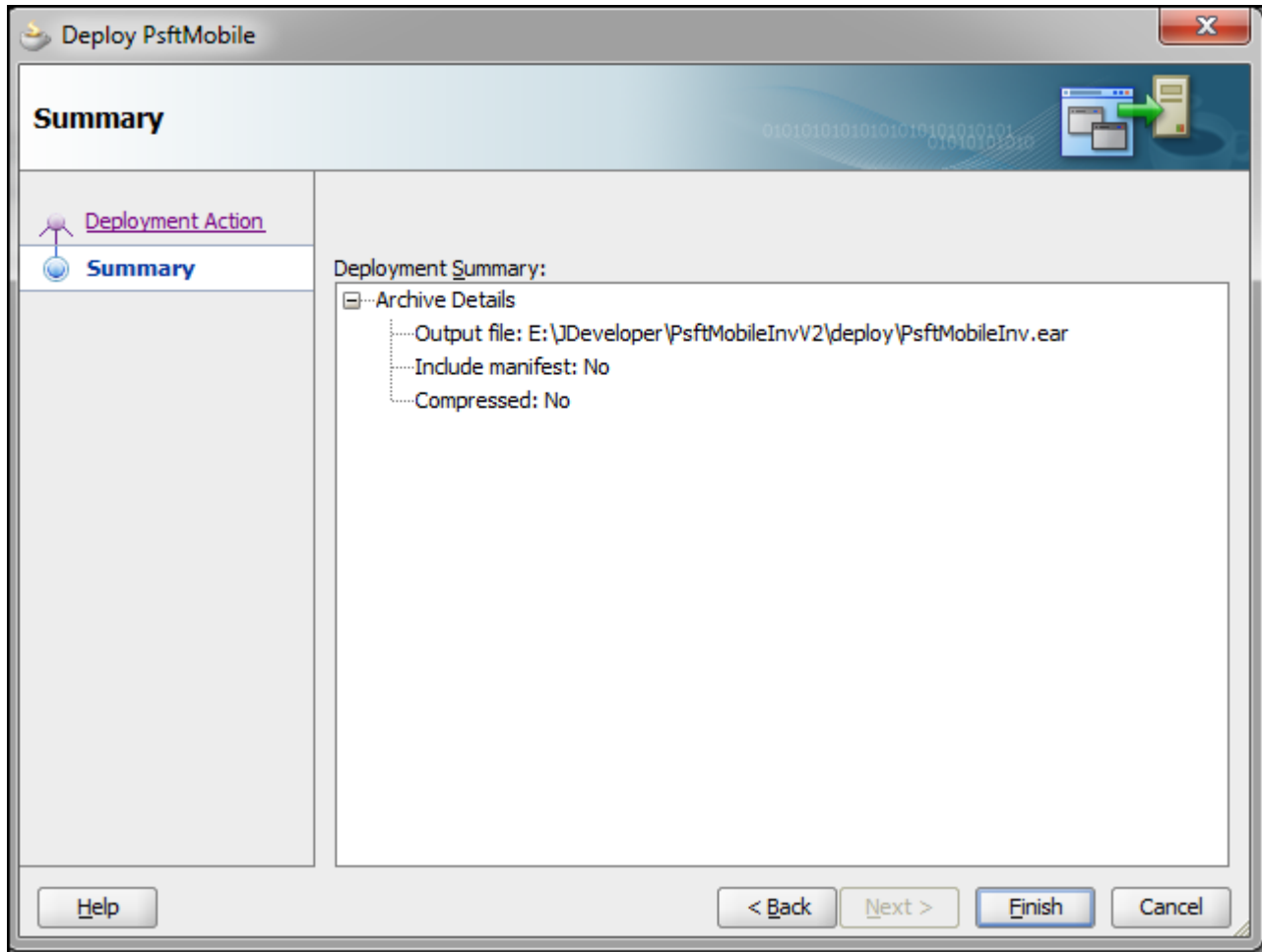
The Deployment Action page opens, as shown in the following example:



Oracle JDeveloper - Deployment Action page

3. On the Deployment Action page, select Deploy to EAR and then click Next.

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



Oracle JDeveloper - Summary page

On the Summary page, the final details of the deployment file are given and include the path and file name where the system creates the EAR file.

4. Click Finish to create the EAR file.

You can now deploy and configure the file on the application server.

Chapter 23

Configuring eMail URLs in PeopleSoft SCM Applications

This chapter discusses:

- Configuring eMail URLs
- Setting Up Pagelets
- Granting Access to Navigation Pages

Task 23-1: Configuring eMail URLs

This section discusses:

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

Understanding eMail Configuration

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

Task 23-1-1: Configuring eMail URLs for Item Loader Exceptions

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

To set up the URL:

1. Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
2. On the URL search page, search for the URL identifier `SCM_SERVLET_INT`.

- On the URL Maintenance page, in the URL field, edit the URL to point to an internal server to access the PeopleSoft Supply Chain Management database, as shown in the following example:

The screenshot shows the Oracle URL Maintenance page for the identifier `SCM_SERVLET_INT`. The page includes the following fields and content:

- URL Identifier:** `SCM_SERVLET_INT`
- *Description:**
- *URLID:**
- Comments:**
 - Internal link to Supply Chain database
 - Example: `http://<machine name>/psp/<website name>/EMPLOYEE/ERP`
 - EMPLOYEE is the portal registry

At the bottom of the form, there is a section titled "URL Properties" and a row of action buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, and Update/Display.

URL Maintenance page for `SCM_SERVLET_INT`

- Click Save.

Task 23-1-2: Configuring eMail URLs for Supplier Facing Applications

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

You must modify `EMP_SERVLET`, `SUP_SERVLET`, and `SUP_OB_INVITE` to point to the correct servers that you plan to use to access the PeopleSoft SCM database. These URLs are a requirement when you are not using an Enterprise Portal, as there is no other way to identify the different web servers used for the Employee or Supplier side.

To set up these URLs:

- Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
- On the URL search page, search for the URL identifier `SUP_SERVLET`.

- On the URL Maintenance page, in the URL field, edit the URL to point to an EXTERNAL server to access the PeopleSoft Supply Chain Management database.

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

The screenshot displays the Oracle URL Maintenance interface. At the top, there is a navigation breadcrumb: Favorites > Main Menu > PeopleTools > Utilities > Administration > URLs. Below this is the Oracle logo and a search bar with 'All' and 'Advanced Search' options. The main content area is titled 'URL Maintenance' and shows the following details for the URL identifier 'SUP_SERVLET':

- *Description:** Supplier portal servlet
- *URLID:** http://webserver/psp/supportal
- Comments:** Link to Supplier Portal
Example: http://localhost/psp/supplierportaldomain/

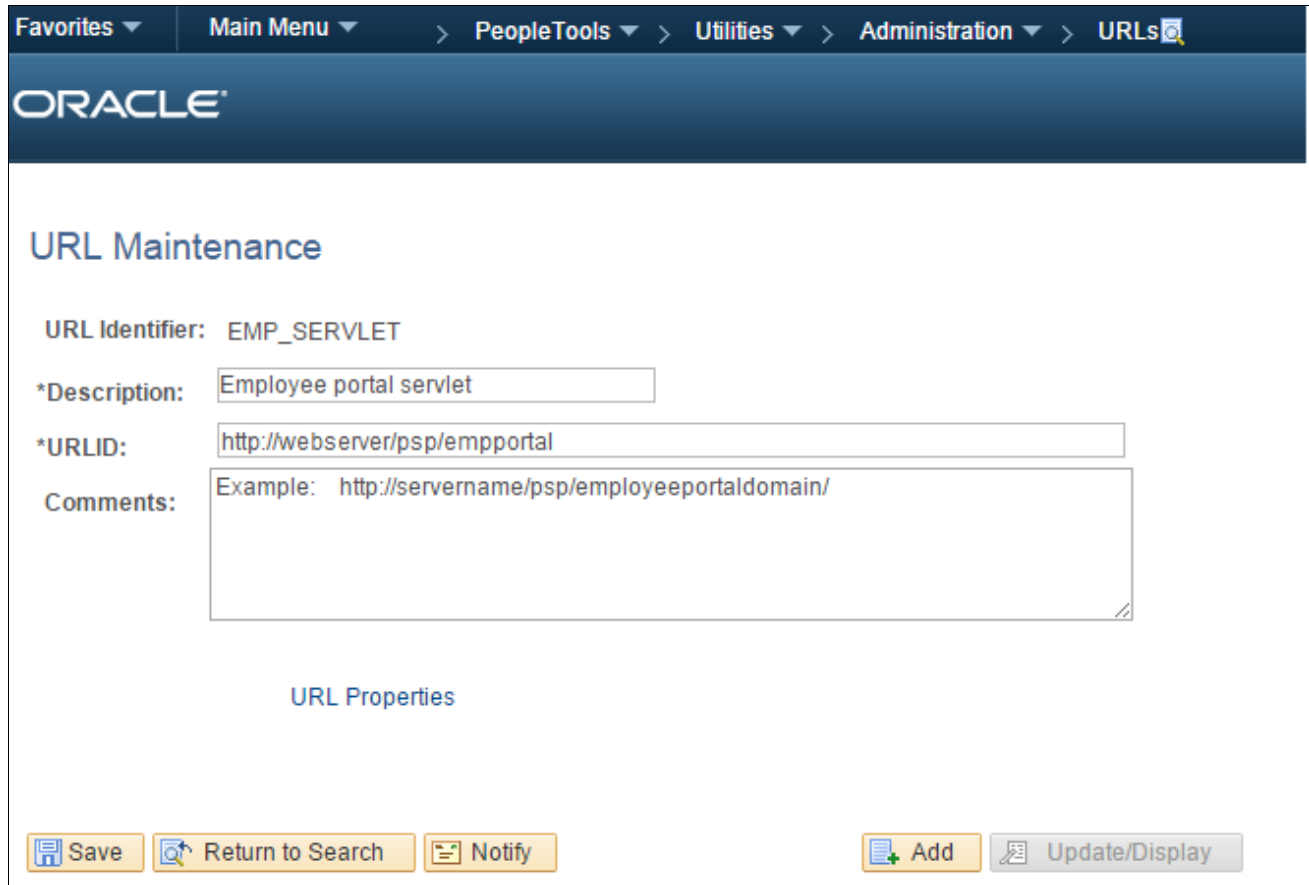
Below the details is a 'URL Properties' link. At the bottom of the page, there is a row of action buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, and Update/Display.

URL Maintenance page for SUP_SERVLET

- Click Save.
- Click Return to Search.
- On the URL search page, search for the URL identifier *EMP_SERVLET*.

7. On the URL Maintenance page, in the URL field, edit the URL to point to an INTERNAL server to access the PeopleSoft Supply Chain Management database.

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



The screenshot shows the Oracle URL Maintenance page for the URL identifier EMP_SERVLET. The page is part of the PeopleTools Administration menu. The main content area displays the following fields:

- URL Identifier:** EMP_SERVLET
- *Description:** Employee portal servlet
- *URLID:** http://webserver/psp/empportal
- Comments:** Example: http://servername/psp/employeeportaldomain/

Below the form is a section titled "URL Properties". At the bottom of the page, there are several buttons: "Save", "Return to Search", "Notify", "Add", and "Update/Display".

URL Maintenance page for EMP_SERVLET

8. Click Save.
9. Click Return to Search.
10. On the URL search page, search for the URL identifier *SUP_OB_INVITE*.

- On the URL Maintenance page, in the URL field, edit the URL to point to an EXTERNAL server to access the PeopleSoft Supply Chain Management database.

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

The screenshot shows the Oracle PeopleTools interface for the URL Maintenance page. The breadcrumb navigation at the top reads: Favorites > Main Menu > PeopleTools > Utilities > Administration > URLs. The Oracle logo is on the left, and a search bar with 'All' and 'Advanced Search' options is on the right. The main content area is titled 'URL Maintenance' and displays the following information:

- URL Identifier:** SUP_OB_INVITE
- *Description:** Onboarding Invitations
- *URLID:** http://
- Comments:** Link to Supplier Portal for Supplier/Bidder registration invitation
Example http://localhost/psp/supplierportaldomain/

Below the form is a section labeled 'URL Properties' and a row of action buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, and Update/Display.

URL Maintenance page for SUP_OB_INVITE

- Click Save.

Task 23-1-3: Configuring eMail URLs for PeopleSoft eBill Payment

You must modify the EB_SERVLET to point to the correct server that you plan to use to access the PeopleSoft SCM database for the CUSTOMER registry. This is necessary to enable PeopleSoft Billing to generate the correct link to the PeopleSoft eBill Payment components.

To set up the URL:

- Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
- On the URL search page, search for the URL identifier *EB_SERVLET*.

- On the URL Maintenance page, edit the URL to point to an EXTERNAL server to access the PeopleSoft Supply Chain Management database.

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

The screenshot shows the Oracle URL Maintenance page for the identifier EB_SERVLET. The page has a breadcrumb trail: Favorites > Main Menu > PeopleTools > Utilities > Administration > URLs. The Oracle logo is in the top left, and a search bar with 'All' and 'Advanced Search' is in the top right. The main content area is titled 'URL Maintenance' and contains the following fields:

- URL Identifier:** EB_SERVLET
- *Description:** Email Notification
- *URLID:** http://<machine-name>/psp/<web-server-domain-name>/CUSTOMER/ERP/c/ROLE_C
- Comments:** Link to eBill Payment bill search used by the Billing Email Notification process.

Below the fields is a 'URL Properties' section. At the bottom of the page are several buttons: Save, Return to Search, Notify, Add, and Update/Display.

URL Maintenance page for EB_SERVLET

- Click Save.

Task 23-2: Setting Up Pagelets

This section discusses:

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

Task 23-2-1: Accessing Pagelets

You can access pagelets within the PeopleSoft 9.2 Supply Chain Management application databases. Use these instructions to apply scripts to your database to allow access to the pagelet configuration homepage.

Note. You must complete the following steps for both the System (SYS) and Demo (DMO) databases, unless otherwise indicated.

To add, remove, or change the layout of the homepage, you must grant the homepage personalization security access to all non-guest users. To update the homepage personalization permission list, use PeopleSoft Data Mover to run the PORTAL_HP_PERS.DMS script.

To add the Portal User role to the user IDs, use PeopleSoft Data Mover to run the PORTAL_ADD_ROLE.DMS script. You can find both scripts in *PS_APP_HOME*\scripts.

Note. You should grant the PAPP_USER role to all new user IDs for access to the homepage personalization. After you run this script, you should manually remove the role PAPP_USER from any GUEST User ID, since the GUEST user should not be personalizing the common homepage.

Task 23-2-2: Enabling Pagelet Creation and Access with Portal Utilities

Perform this task only if you are licensed for PeopleSoft Supply Chain Portal Pack or PeopleSoft Portal Solutions. Use PeopleSoft Data Mover to run the EOPP_PORTAL_PACK.DMS script in *PS_APP_HOME*\scripts. This script enables the creation and viewing of pagelets using the Enterprise Components Portal Utilities.

Task 23-3: Granting Access to Navigation Pages

To access the navigation pages, you must grant security to the Navigation Page IScripts to all users. To add the EOPP_USER role to all users, use PeopleSoft Data Mover to run the EOPP_ADD_ROLE.DMS script in *PS_APP_HOME*\scripts.

Note. When you create a new user ID, you should add the EOPP_USER role to the new user ID.

Chapter 24

Setting Up PeopleSoft Supplier Relationship Management Applications

This chapter discusses:

- Reviewing the PeopleSoft 9.2 Supplier Contract Management Setup
- Installing PeopleSoft 9.2 eProcurement
- Granting Security in PeopleSoft Mobile eProcurement
- Setting Up the Secure Enterprise Search Engine in Mobile eProcurement

Reviewing the PeopleSoft 9.2 Supplier Contract Management Setup

This section applies to PeopleSoft Supplier Contract Management. To use PeopleSoft Supplier Contract Management, you must set up a database or FTP file attachment server, and have Microsoft Word 2007 or higher installed.

Review the following setup tasks:

- Setup of a Microsoft Word template.
- Optional setup for individual clients to allow certain users to look up clauses and bind variables in the PeopleSoft database from within Microsoft Word using Microsoft Research task pane functionality.
- Optional setup to allow users to perform server side compares of Microsoft Word documents, and optional dispatch of contracts to suppliers in a .doc or .pdf format (versus the default .xml format).
- Optional installation setup for Oracle Secure Enterprise Search.
- Optional installation setup for workflow.
- Optional installation setup for contract syndication
- Optional setup that enables documents to use digital signatures like Adobe or Microsoft Word 2007 or higher versions.

See the product documentation for PeopleSoft FSCM: Supplier Contract Management for more information about the setup tasks.

Task 24-1: Installing PeopleSoft 9.2 eProcurement

This section discusses:

- Understanding PeopleSoft 9.2 eProcurement Installation

- Installing PeopleSoft eProcurement CUP Item Export

Understanding PeopleSoft 9.2 eProcurement Installation

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

Note. To install PeopleSoft eProcurement, you must have administrator access rights to the local machine that you are using for the installation.

Task 24-1-1: Installing PeopleSoft eProcurement CUP Item Export

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

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

```
PS_APP_HOME\setup\eProcurement\eng\Setup.exe
```

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

To install PeopleSoft eProcurement CUP Item Export:

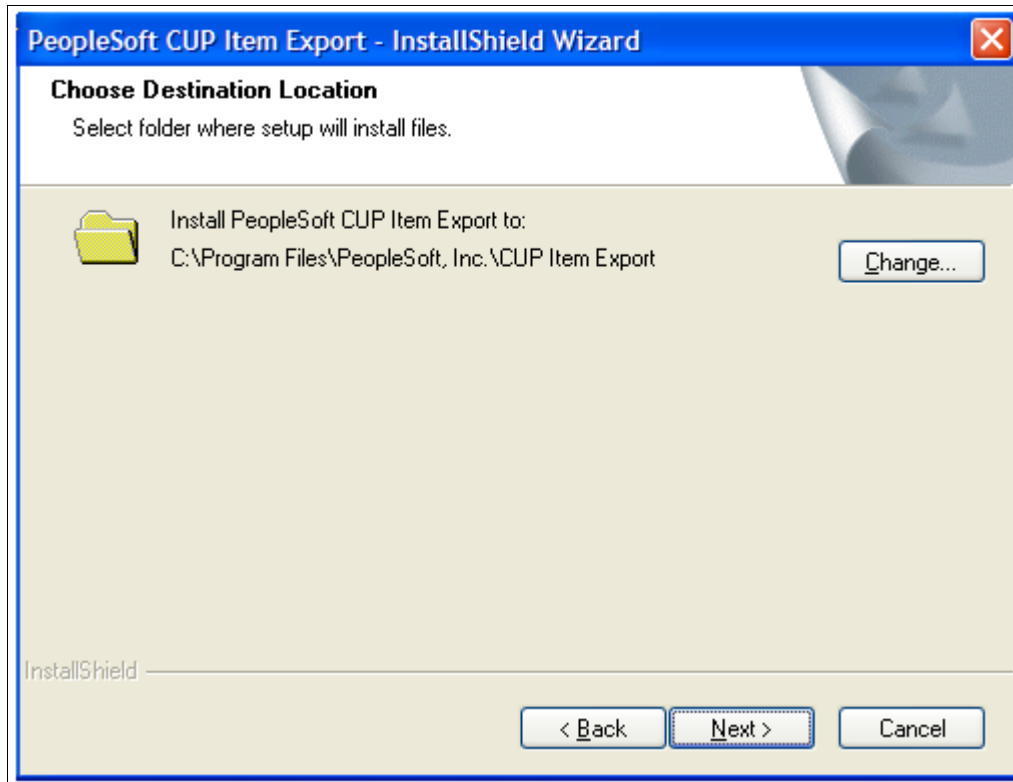
1. Double click Setup.exe.

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



CUP Item Export Welcome page

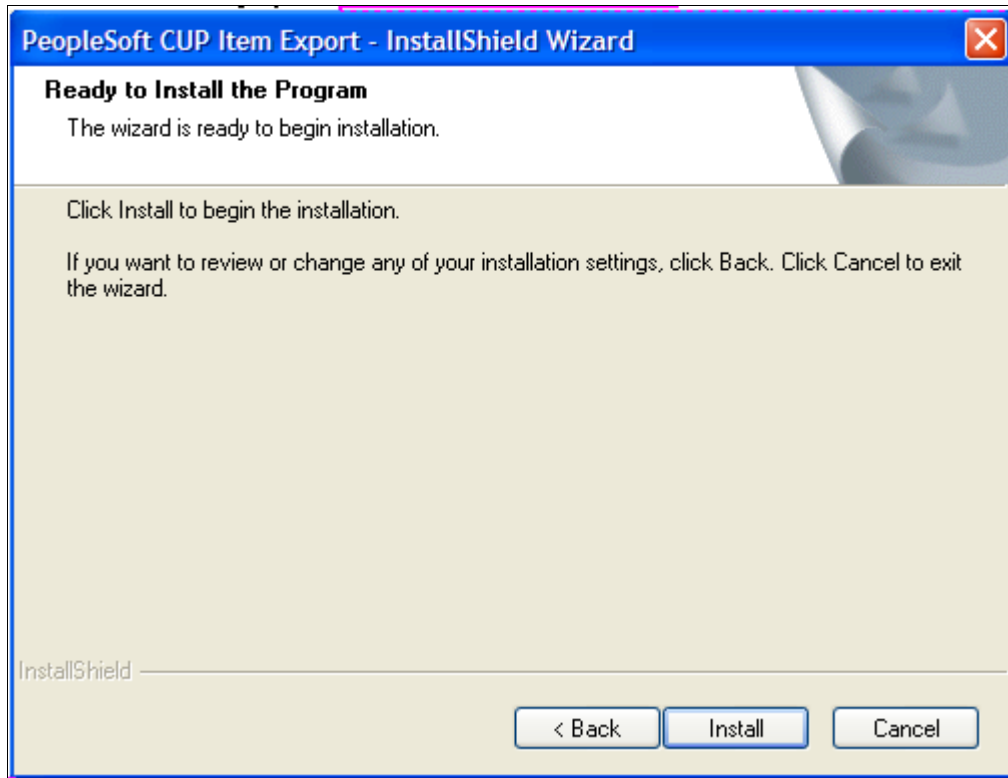
2. Click Next to access the Choose Destination Location page, as shown in the following example:



Choose Destination Location page

The Choose Destination Location page displays the default destination, C:\Program Files\PeopleSoft, Inc\CUP Item Export, where the installer loads the CUP Item Export Setup program. To use another installation destination, click Change to enter the new destination path, or navigate to another folder or network drive.

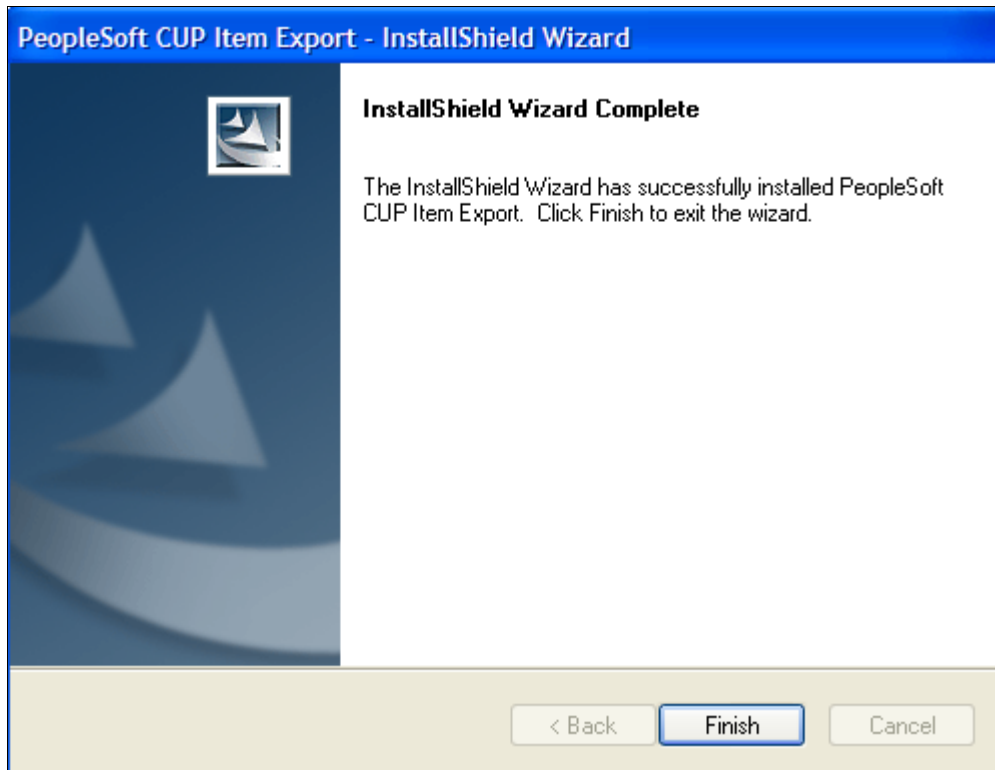
3. Click Next to display the Ready to Install the Program page, as shown in the following example:



Ready to Install the Program page

4. Click Install to start copying files.

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



PeopleSoft CUP Item Export - InstallShield Wizard Complete page

5. Click Finish.

This completes the local installation of the PeopleSoft eProcurement CUP Item Export on your machine.

Task 24-2: Granting Security in PeopleSoft Mobile eProcurement

Understanding PeopleSoft Mobile eProcurement

The PeopleSoft Mobile eProcurement application is based on PeopleSoft's IScript architecture combined with a Component Interface. IScripts build the front end display and the Component Interface handles the bulk of the business logic at the back end.

Use the Permission List EPPV1000 from PeopleSoft Pure Internet Architecture to grant security to PeopleSoft Mobile eProcurement 9.2 objects.

Permission lists are tied to roles. Users are then tied to those roles so by granting permission to an object in a permission list, any user assigned to a role that is tied to that permission list is granted permission.

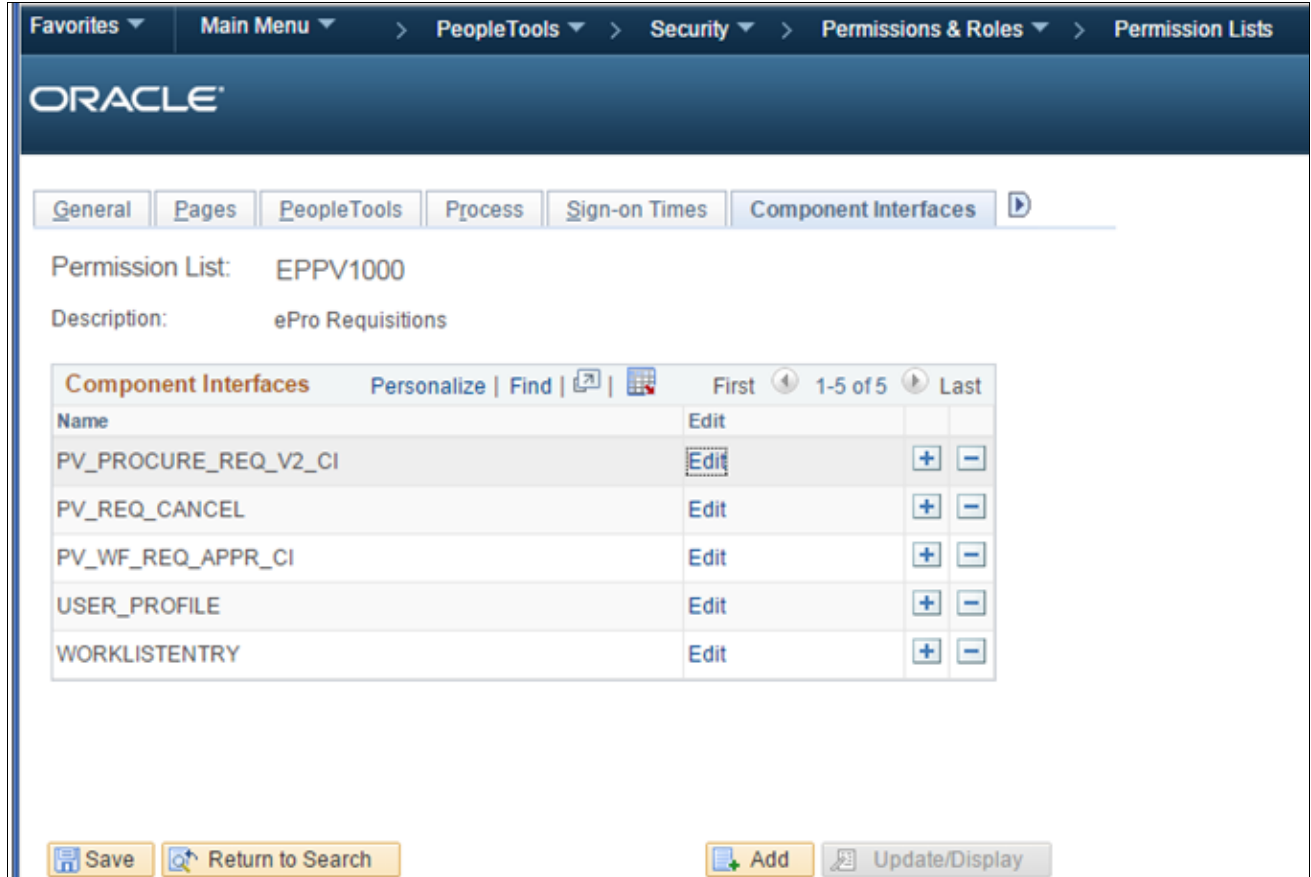
Task 24-2-1: Granting Access to Component Interfaces

To grant permission to permission lists, navigate to the PeopleTools Permission Lists component:

1. Select PeopleTools, Security, Permissions & Roles, Permission Lists.
2. Search for and select the Permission List EPPV1000.
3. Select the Component Interfaces tab.

Mobile eProcurement requires the use of Component Interface PV_PROCURE_REQ_V2_CI.

4. Select Edit for Component Interface PV_PROCURE_REQ_V2_CI in the Component Interfaces tab as shown in the following example:



Permission Lists page: Component Interfaces tab for PV_PROCURE_REQ_V2_CI

5. Grant Full access for all the methods in the list as shown in the following example:

The screenshot shows a window titled "Component Interface Permissions" for the component "PV_PROCURE_REQ_V2_CI". The window contains a table with two columns: "Method" and "*Method Access". The "AddItem" method is highlighted, and its access is set to "Full Access". All other methods in the list also have "Full Access" selected. To the right of the table are two buttons: "Full Access (All)" and "No Access (All)". At the bottom of the window are "OK" and "Cancel" buttons.

Method	*Method Access
AddItem	Full Access
Cancel	Full Access
ChangeShipTo	Full Access
Create	Full Access
Find	Full Access
Get	Full Access
GetAuthorizedCatalogs	Full Access
GetDirectConnectList	Full Access
GetSubstituteItemRoleView	Full Access
GetViewAllVendorsRoleView	Full Access
Save	Full Access
SaveRequisition	Full Access
SaveRequisitionforLater	Full Access

Component Interface Permissions page for PV_PROCURE_REQ_V2_CI

6. Click OK.

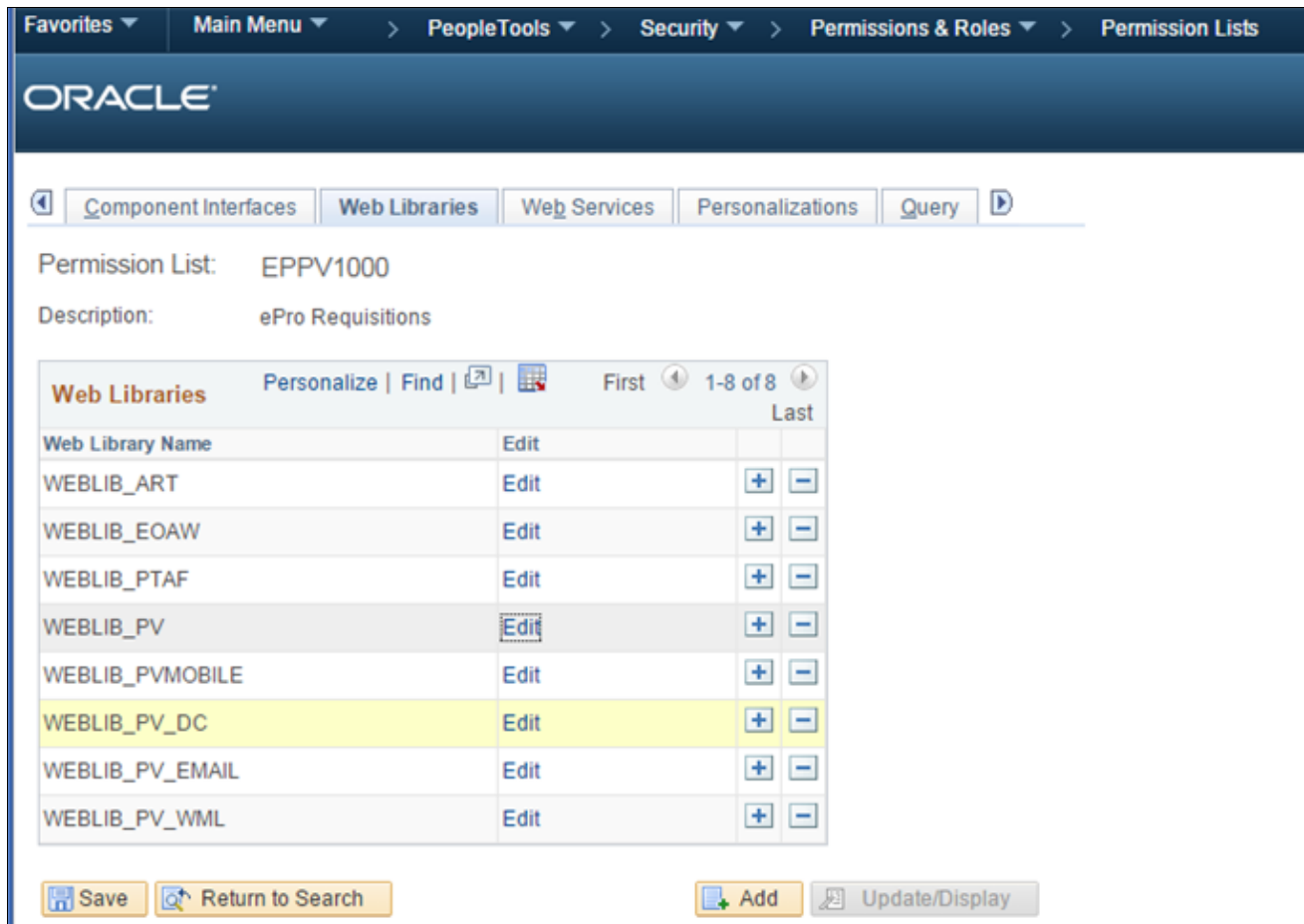
Task 24-2-2: Granting Access to Web Libraries (IScript Functions)

Mobile eProcurement also requires the use of various IScript functions which are present inside Web Libraries. IScript functions are PeopleSoft records that start with prefix IScript_.

To grant permission to Web Libraries:

1. Navigate to PeopleTools, Security, Permissions & Roles, Permission Lists.
2. Search for and select the Permission List EPPV1000.
3. On the Permission Lists page, select the Web Libraries tab.

4. Select the Edit link for the WEBLIB_PV record as shown in the following example:



Permission Lists page: Web Libraries tab for WEBLIB_PV

Note. Once one of these records is added to the Web Libraries tab of the Permission List component, all functions that contain the prefix in any field is automatically displayed in the Web Library permissions secondary page.

5. Grant full access to all the IScript functions as shown in the following example:

WebLib Permissions

WEBLIB_PV

Web Library Permission Personalize | Find | First 1-40 of 40 Last

Full Access (All)
No Access (All)

Function	*Access Permissions	View Content References for this Script
ISCRIP11.FieldFormula.IScript_PVShopCart_Template	Full Access	View
ISCRIP11.FieldFormula.IScript_WFDesignerDeleteRow	Full Access	View
ISCRIP11.FieldFormula.IScript_WFHomePageRedirect	Full Access	View
PV_CATALOG_SELECT.FieldFormula.IScript_SelectCatalogs	Full Access	View
PV_CONTEXT_LINKS.FieldFormula.IScript_TransactionLinks	Full Access	View
PV_FRAMEBREAKER.FieldFormula.IScript_Frame_Breaker	Full Access	View
PV_INFO_POPUP.FieldFormula.IScript_ChunkChangeConfirm	Full Access	View
PV_INFO_POPUP.FieldFormula.IScript_ChunkChangeFinish	Full Access	View
PV_INFO_POPUP.FieldFormula.IScript_CloseWindow	Full Access	View
PV_INFO_POPUP.FieldFormula.IScript_PurchasePriceBreaks	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_DirectConnect	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_Fullsite	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_GetCart	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_GetCartJ	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_GetCartJson	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_Order	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_PVMsrch	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_Submit	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_cartrefresh	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_cartuodate	Full Access	View

WebLib Permissions page for WEBLIB_PV

6. Repeat steps 1–5 for Web Library WEBLIB_PVMOBILE.

Grant Full Access to the following:

- PV_ISCRIP11_LIB.FieldFormula.IScript_AjaxText
- PV_ISCRIP11_LIB.FieldFormula.IScript_ChangeRequestInfo

7. Repeat steps 1–5 for Web Library WEBLIB_PV_DC.

Grant Full Access to the following:

- PV_ISCRIP11_LIB.FieldFormula.IScript_DCCatcher
- PV_ISCRIP11_LIB.FieldFormula.IScript_DirectConnect

Task 24-2-3: Granting Access to Users

The Mobile eProcurement Requisition component and its Permission List EPPV1000 has already been assigned to roles ePro Requester and ePro Novice Requester in order to access the Mobile eProcurement application.

You can also assign the Permission List EPPV1000 to any roles that would grant Mobile eProcurement permissions to any user belonging to the assigned roles. The following example shows that the Permission List EPPV1000 is assigned to the role ePro Requester:

The screenshot shows the Oracle PeopleSoft interface for the 'Roles' page. The breadcrumb trail is: Favorites > Main Menu > PeopleTools > Security > Permissions & Roles > Roles. The Oracle logo is at the top left. Below the logo is a navigation bar with tabs: General, Permission Lists (selected), Members, Dynamic Members, Workflow, Role Grant, Links, Role Queries, and Audit. The main content area shows: Role Name: ePro Requester, Description: eProcurement Requester. Below this is a 'Permission Lists' section with a search bar containing 'EPPV1000' and a magnifying glass icon. The search results table has columns: *Permission List, Description, and View Definition. The table contains one row: EPPV1000, ePro Requisitions, and View Definition. There are navigation controls: Personalize, Find, View All, First, 1 of 1, Last. At the bottom of the page are buttons: Save, Return to Search, Add, and Update/Display. A footer navigation bar contains: General | Permission Lists | Members | Dynamic Members | Workflow | Role Grant | Links | Role Queries | Audit.

Roles page: Permission Lists tab for Role ePro Requester

You can navigate to the User Profiles page to see the various roles to which the user belongs, as shown in the following example:

The screenshot displays the Oracle PeopleSoft interface for the 'User Profiles' page, specifically the 'Roles' tab. The breadcrumb navigation shows: Favorites > Main Menu > PeopleTools > Security > User Profiles > User Profiles. The Oracle logo is at the top left. Below the navigation, there are tabs for 'General', 'ID', 'Roles', 'Workflow', 'Audit', 'Links', and 'User ID Queries'. The 'Roles' tab is active, showing 'User ID VP1' and 'Description Kenneth Schumacher'. On the left, there is a 'Dynamic Role Rule' section with a search box and buttons for 'Test Rule(s)', 'Refresh', 'Execute Rule(s)', 'Process Monitor', and 'Service Monitor'. The main area contains a table titled 'User Roles' with columns: Role Name, Description, Dynamic, and View Definition. The table lists ten roles, each with a 'Dynamic' checkbox and a 'View Definition' link. At the bottom, there are 'Save' and 'Return to Search' buttons on the left, and 'Add' and 'Update/Display' buttons on the right. A footer navigation bar includes: General | ID | Roles | Workflow | Audit | Links | User ID Queries.

Role Name	Description	Dynamic	View Definition
Treasurer	Sample - Treasurer	<input type="checkbox"/>	Route Control View Definition
UPG_ALLPNLS		<input type="checkbox"/>	Route Control View Definition
UPG_APPSRVR	Can start application server	<input type="checkbox"/>	Route Control View Definition
VICE PRESIDENT	Vice President	<input type="checkbox"/>	Route Control View Definition
VMI Manager	VMI Manager	<input type="checkbox"/>	Route Control View Definition
XMLP Power User	BIP Power User	<input type="checkbox"/>	Route Control View Definition
XMLP Report Developer	BIP Report Developer	<input type="checkbox"/>	Route Control View Definition
ePro Admin	ePro Administrator	<input type="checkbox"/>	Route Control View Definition
ePro Buyer	ePro Buyer	<input type="checkbox"/>	Route Control View Definition
ePro Requester	eProcurement Requester	<input type="checkbox"/>	Route Control View Definition

User Profiles page: Roles tab

Task 24-3: Setting Up the Secure Enterprise Search Engine in Mobile eProcurement

This section discusses:

- Understanding Oracle Secure Enterprise Search (SES)
- Indexing and Deploying Search Definitions
- Application Searching (Global Search) Security

Understanding Oracle Secure Enterprise Search (SES)

Oracle Secure Enterprise Search (SES) needs to be completely installed and operational prior to Mobile eProcurement object deployment and indexing.

See *PeopleTools: Search Technology*, "Understanding PeopleSoft Search Framework."

Task 24-3-1: Indexing and Deploying Search Definitions

Mobile eProcurement uses the following three Search Definitions:

- EP_PV_MASTERITEMS_SD
- EP_PV_MASTERITEMVENDOR_SD
- EP_PV_EXPRESSITEMS_SD

All search definitions for eProcurement must be deployed. In addition to the preceding search definitions, search category EP_PV_MASTERITEMVENDOR_CAT must be deployed.

To deploy the search definitions and the search category:

1. Select PeopleTools, Search Framework, Administration, Deploy/Delete Object to display the Deploy Search Definitions page.
2. Select the three search definitions for eProcurement EP_PV_EXPRESSITEMS_SD, EP_PV_MASTERITEMVENDOR_SD, and EP_PV_MASTERITEM_SD, and click the Deploy button.
Search definitions must be deployed prior to indexing.
3. Select the Deploy Search Category tab to display the Display Search Category page.
4. Select the search category EP_PV_MASTERITEMVENDOR_CAT, and click the Deploy button.

Note. For global search, search category EP_CATALOG_ITEMS should also be deployed.

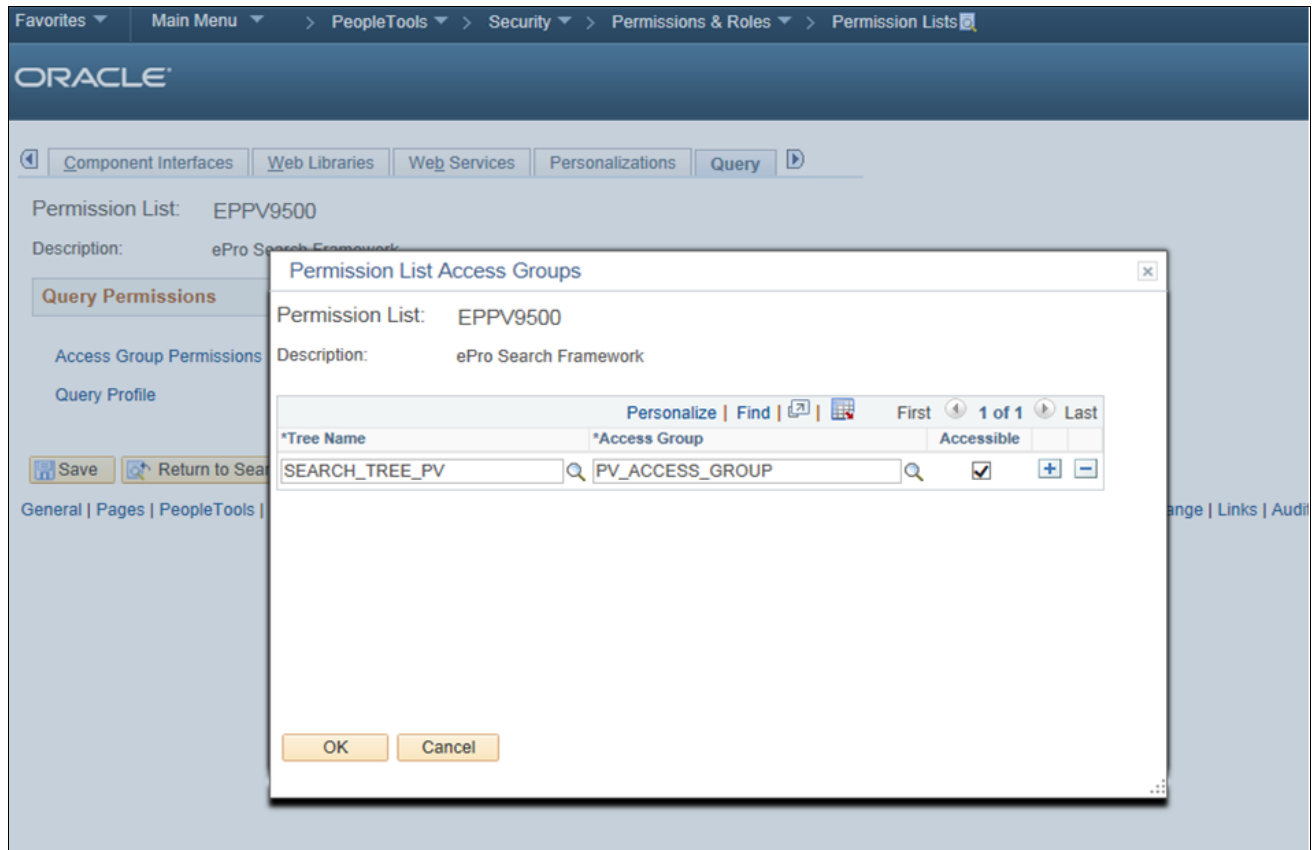
Before indexing the search definitions, verify that the user has been assigned to the Permission List EPPV9500.

This permission list is delivered with the role Search Query Administrator.

To verify:

1. Select PeopleTools, Security, Permissions & Roles, Permission Lists.
2. Search for and select the Permission List EPPV9500.
3. Select the Query tab.
4. Select the Access Group Permissions link.

5. The Permission List is connected to the access group PV_ACCESS_GROUP, which is a part of Query Access Tree SEARCH_TREE_PV, as shown in the following example:



Permission List Access Groups page for EPPV9500

Note. PV_ACCESS_GROUP contains all the views that are used by PeopleSoft Query in order to extract data in Oracle SES indexing.

To index the eProcurement search definitions:

1. Select PeopleTools, Search Framework, Administration, Schedule Search Index.
2. Create a new run control ID.
3. Select Search Definition *EP_PV_MASTERITEMVENDOR_SD*.
4. Select Full Index as the type of index, for the initial run.
5. Select Base Language as the language option. If multi-language for database is enabled, then select All Languages to index multiple languages.
6. Click Run to start the process.
7. On the Process Scheduler Request page, click OK.
8. On the Process Monitor page, verify that the process runs to success.

Repeat steps 1 through 8 for the search definitions *EP_PV_EXPRESSITEMS_SD* and *EP_PV_MASTERITEM_SD*.

To enable SES for Mobile eProcurement, select eProcurement, Administer Procurement, Maintain Overall System Options, eProcurement Installation Options, and select Catalog Search Type as *Secure Enterprise Search*, as shown in the following example:

The screenshot shows the Oracle eProcurement Installation Options page. The breadcrumb trail is: Favorites > Main Menu > eProcurement > Administer Procurement. The page title is "eProcurement Installation Options".

At the top, there is a navigation bar with "Favorites", "Main Menu", "eProcurement", and "Administer Procurement". Below this is the Oracle logo.

The main content area is titled "eProcurement Installation Options". It contains several sections:

- *sProcurement Installation Option:** A dropdown menu set to "eProcurement with sProcurement". A link for "Mobile Installation Settings" is visible to the right.
- Item Catalog Options:**
 - *Item Source Option: A dropdown menu set to "Master Items Only".
 - Catalog Management as eProcurement Item Source
- Requisition Catalog Search:**
 - *Catalog Search Type: A dropdown menu with "Secure Enterprise Search" selected and highlighted by a mouse cursor. "Structured Query Language" is also visible.
 - BU Catalog Control: A text input field containing "N".
 - Options:
 - Non Dynamic Range
 - Override Existing Categories with Item Ranges
 - Allow Transparent Punchout Items
 - Consolidate Marketplace Items in Search Results and Facets
 - [Customize Search Results](#)
- Requisition Display Options:**
 - Suppress trailing zeros for Quantity field
 - Suppress trailing zeros up to the currency decimal position for Price field
- Allow Saving Items in Favorites, Templates and Recently Ordered From:**
 - Direct Connect
 - Transparent Punchout
- Max Rows To Retrieve For:**
 - Search Results:
 - Approval Monitor:
 - Transparent Punchout:
 - Requisition:
- Display Approval Chunking

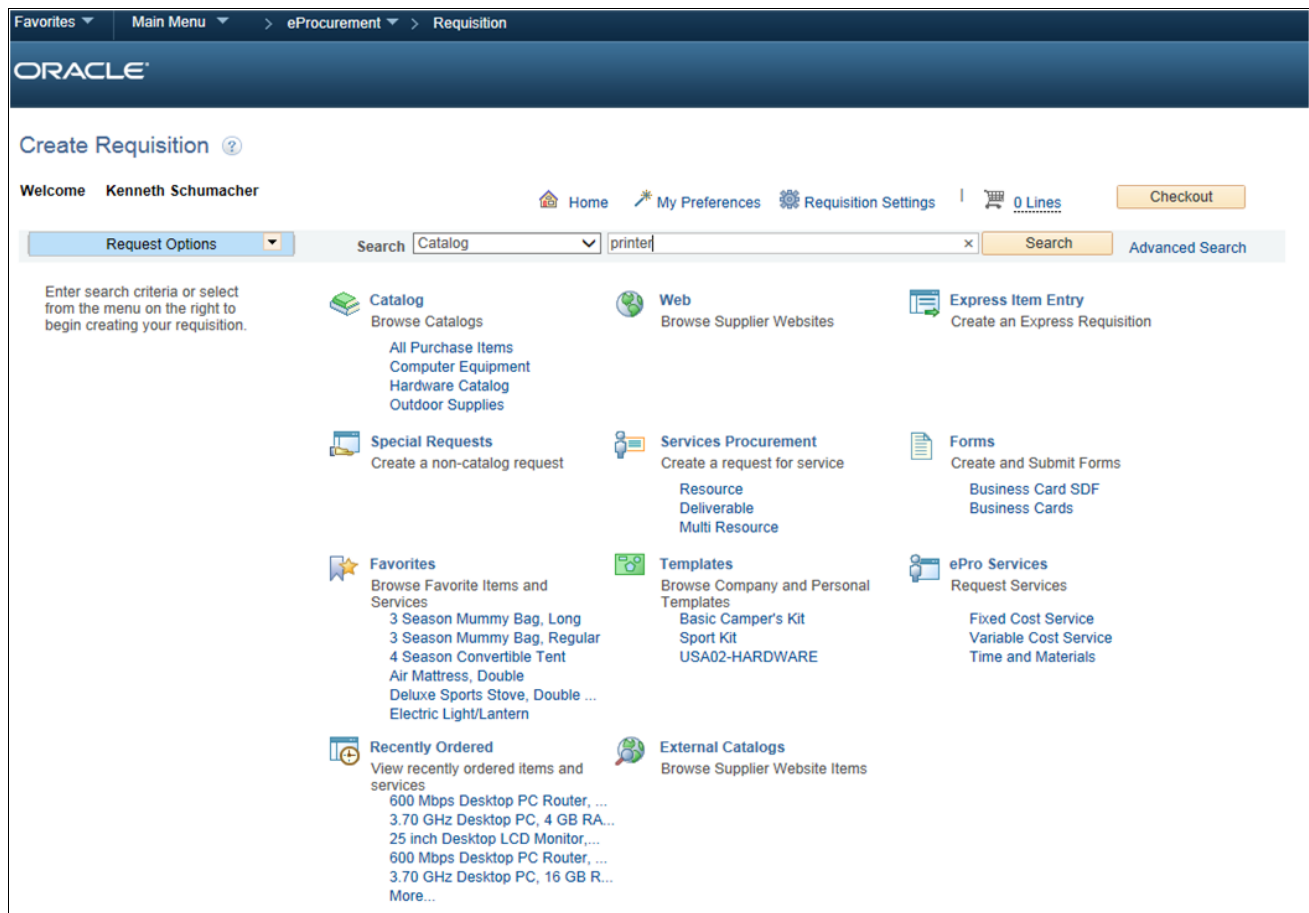
At the bottom of the page, there are two links: "Return to Maintain Overall System Options" and "Return to Administer Procurement". At the very bottom, there are "Save" and "Notify" buttons.

eProcurement Installation Options page: Enable SES

To verify that the SES is working:

1. Select eProcurement, Requisition.

- In the search bar, select the search type as Catalog, and enter a suitable text to search, for example, *Printer*, as shown in the following example:



Requisition Page: Verify SES

- Click Search. The Catalog Search Results page opens with the search results. In this page, the search results are displayed on the right panel, and the details pertaining to each search result are displayed on the left panel.

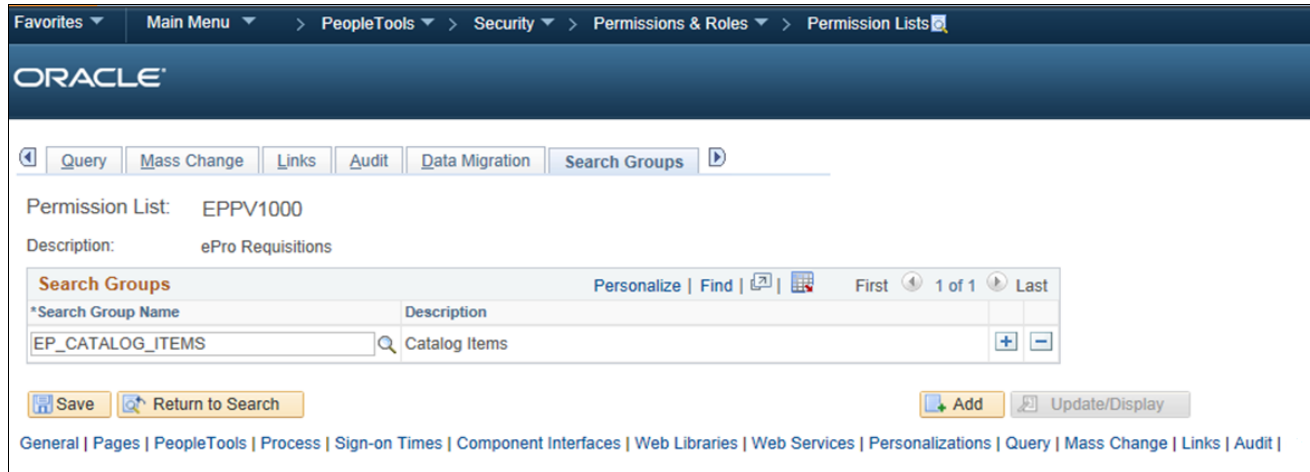
Task 24-3-2: Application Searching (Global Search) Security

To activate Application Searching for catalog items, in addition to deploying and indexing all the regular eProcurement Search Definitions and Categories, an additional category EP_CATALOG_ITEMS must be deployed and specified as a Search Group. This category, like the category EP_PV_MASTERITEMVENDOR_CAT, has all the required three search definitions mentioned in the previous section.

To perform Global Search, EP_CATALOG_ITEMS has to be assigned to a Permission List :

- Select PeopleTools , Security, Permissions & Roles, Permission Lists.
- Search for and select the Permission List EPPV1000.
- Select the Search Groups tab.

- Select the catalog item EP_CATALOG_ITEMS from the lookup prompt, which is the Search Category specified as Search Group, as shown in the in the following example:



Permission Lists page: Search Groups tab for EPPV1000

Note. Search categories flagged as search groups will only appear in the lookup prompt.

- Click Save. Global Search bar appears after adding the search group.

Note. The user may need to log out and log in back to see the global search bar. Additionally, this type of searching must be activated as part of the Portal configuration.

The user associated with a role connected with the permission list and any search groups assigned as searchable targets should be able to see the global search bar.

Chapter 25

Installing PeopleSoft 9.2 In-Memory Products

This chapter discusses:

- Installing In-Memory Project Discovery
- Installing In-Memory Real-Time Bottom Line

Task 25-1: Installing In-Memory Project Discovery

If you license In-Memory Project Discovery, after installing PeopleSoft FSCM 9.2, you will need to complete the additional installation instructions found in the PeopleSoft FSCM 9.2 In-Memory Project Discovery installation documentation. This documentation is available on My Oracle Support:

See the PeopleSoft Financials/Supply Chain Management 9.2 In-Memory Project Discovery installation home page in My Oracle Support (Document ID: 1607093.1).

Task 25-2: Installing In-Memory Real-Time Bottom Line

If you license In-Memory Financial Allocations Analyzer or Financial Position Analyzer, after installing PeopleSoft FSCM 9.2, you will need to complete the additional installation instructions found in the PeopleSoft FSCM 9.2 In-Memory Real-Time Bottom Line installation documentation. This documentation is available on My Oracle Support:

See the PeopleSoft Financials/Supply Chain Management 9.2 In-Memory Real-Time Bottom Line installation home page in My Oracle Support (Document ID: 1607095.1).

