
Enterprise PeopleTools 8.49 Installation for Microsoft SQL Server

April 2007

Enterprise PeopleTools 8.49
Installation for Microsoft SQL Server
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About This Documentation

This preface discusses:

- Audience
- Products Referenced in this Book
- Related Publications

Note. This book is designed to direct you through a basic PeopleSoft installation. It is not a substitute for the database administration manuals provided by your RDBMS vendor, the network administration manuals provided by your network vendor, or the installation and configuration manuals for additional software components used with PeopleSoft.

Note. Required updates to this installation documentation are provided in the form of “Required at Install” incidents, available on PeopleSoft Customer Connection. In addition, *application-specific installation steps are provided in a separate document specific to the application.* For instance, if you are performing Oracle’s PeopleSoft CRM installation, you need both this PeopleTools installation guide and any additional instructions provided by CRM. To find the installation documentation specific to your application, go to Customer Connection, choose *Site Index*, the letter *I*, *Installation Guides and Notes*, and then look under the subcategory for your particular application.

Note. Before proceeding with your installation, check PeopleSoft Customer Connection to ensure that you have the latest version of this installation guide for the correct version of PeopleTools.

Audience

This book is written for the individuals responsible for installing and administering the PeopleSoft environment. We assume that you are familiar with your operating environment and RDBMS and that you have the necessary skills to support that environment. You should also have a working knowledge of SQL. We recommend that you have completed at least one PeopleSoft introductory training course (particularly the Server Administration and Installation course) and have a basic understanding of the PeopleSoft System. Probably the most important component in the installation and maintenance of your PeopleSoft system is your onsite expertise. Only qualified and experienced individuals should attempt to install PeopleSoft. If you have any doubts as to whether your onsite staff is capable of successfully completing an installation, contact your PeopleSoft representative.

Products Referenced in this Book

This installation guide refers to these products:

- Oracle’s PeopleSoft Enterprise PeopleTools, referred to as PeopleTools
- Oracle’s PeopleSoft Enterprise products, referred to as PeopleSoft
- Oracle’s PeopleSoft Pure Internet Architecture
- Oracle’s PeopleSoft Change Assistant

- Oracle's PeopleSoft Change Impact Analyzer
- Oracle Application Server
- Oracle BPEL Process Manager
- Applications such as Oracle's PeopleSoft Enterprise Human Capital Management and Oracle's PeopleSoft Enterprise Customer Relationship Management

See All PeopleSoft Enterprise Products on Oracle's web site, http://www.oracle.com/applications/peoplesoft/all_ent_products.html

Related Publications

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

For reference information on PeopleTools, you may wish to consult the following books:

- *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*: This includes information on configuring the PeopleSoft application server and supported web servers, data integrity tools, database level auditing, and PeopleTools utilities, including Configuration Manager and configurations for PeopleSoft search.
- *Enterprise PeopleTools 8.49 PeopleBook: Security Administration*: This includes information on setting up and modifying user access to PeopleSoft applications, and defines the various IDs and passwords used in installation.
- *Enterprise PeopleTools 8.49 PeopleBook: Data Management*: This includes information on PeopleSoft administrative utilities, such as Data Mover, Data Archive Manager, and so on.
- *Enterprise PeopleTools 8.49 PeopleBook: PeopleCode Language Reference*: This includes reference information on the PeopleCode language, such as built-in functions, classes, meta-SQL, system variables, and so on.
- *Enterprise PeopleTools 8.49 PeopleBook: PeopleCode Developer's Guide*: This includes general information about the PeopleCode editor, the Component Processor, the data buffers, and how to use specific functions and classes.
- *Reporting and Analysis Tools*: For information on PeopleSoft's reporting and analysis tools, see the Enterprise PeopleTools 8.49 PeopleBooks on Crystal Reports for PeopleSoft, PS/nVision, PeopleSoft Query, PeopleSoft Tree Manager, PeopleSoft Process Scheduler, and PeopleSoft Cube Manager.
- *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Application Designer*: This includes information about the main tool for developing PeopleTools applications.
- *Enterprise PeopleTools 8.49 PeopleBook: Global Technology*: This includes information on the role of PeopleTools in the globalization of PeopleSoft applications.
- *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Application Engine*: This includes information on the PeopleSoft proprietary batch programming tool.

For information on a tool to help you write transformation Application Engine programs see the appendix "Using XSLT Mapper with Oracle BPEL Process Manager."

For reference information on your particular application, refer to the documentation for your application.

CHAPTER 1

Preparing for Installation

This chapter discusses:

- Understanding the PeopleSoft Installation
- Assembling Related Documentation
- Verifying Hardware and Software Requirements
- Considering Project Planning
- Planning Your Initial Configuration
- Planning Database Creation
- Planning Multilingual Strategy
- Reviewing Updates and Fixes Required at Installation
- Installing Supporting Applications
- Installing Microsoft SQL Server 2000
- Increasing the Size of Tempdb
- Installing Client Connectivity
- Performing Backups
- Using PeopleSoft Change Assistant and PeopleSoft Change Impact Analyzer

Understanding the PeopleSoft Installation

This chapter will help you plan and prepare for a basic PeopleSoft installation. Before you begin the installation, please note:

- If you will be upgrading your current release after you perform this installation, you also need to install the Upgrade Assistant or Change Assistant. The upgrade page on PeopleSoft Customer Connection includes information on which tool you need.
- For critical issues related to the installation process, see the PeopleSoft Customer Connection web site. Be sure to read the “Required for Installation or Upgrade” incidents for the PeopleTools version that you are installing.
- For online, interactive technical support information, use the Oracle Metalink web site.
See Oracle Metalink, <https://metalink.oracle.com>
- To download software and documentation, use the Oracle Technology Network.

See Oracle Technology Network, <http://www.oracle.com/technology/index.html>

- This installation guide may refer you to PeopleBooks for more information or instructions. If you install PeopleBooks to your web server, you can easily refer to the documentation during the installation process.

See Also

“Installing PeopleBooks”

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Upgrade Assistant

Enterprise PeopleTools 8.49 PeopleBook: Software Updates

“Installing PeopleSoft Change Assistant”

Task 1-1: Assembling Related Documentation

Before you begin your installation, you should have the following documentation ready for reference:

- Locate the supplemental installation documentation for any PeopleSoft applications that you plan to install.
Be sure to use both the PeopleTools Installation Guide for your database platform *and* the supplemental application installation instructions. (For example, if you are installing CRM, you need to have the PeopleTools Installation Guide for the appropriate PeopleTools release and the supplemental CRM installation instructions.) The application installation instructions are available on Customer Connection.
- Locate the database administration manuals provided by your RDBMS vendor, the network administration manuals provided by your network vendor, and the installation and configuration manuals for additional software components used with PeopleSoft.
- For administration information regarding your database platform, please refer to the relevant appendix in the following PeopleBook.

See *Enterprise PeopleTools 8.49 PeopleBook: Data Management*.

Task 1-2: Verifying Hardware and Software Requirements

Before you install PeopleSoft you must verify that you have the correct hardware and software in place to support a successful installation.

Warning! If you are unable to meet any of the criteria outlined in the Enterprise PeopleTools 8.49 Hardware and Software Requirements documentation and Supported Platforms on PeopleSoft Customer Connection, contact PeopleSoft before going forward with the installation. Attempting to complete an installation on an unsupported configuration can be a *very* costly decision, and PeopleSoft will not provide support for such installations.

Use the following sources of information on currently supported hardware and software:

- The Enterprise PeopleTools 8.49 Hardware and Software Requirements book provides an overview of PeopleSoft architecture, as well as general information on the hardware and software required for a successful installation.

This book is a snapshot of supported configurations; it does not provide up-to-the-minute information on supported maintenance releases or required patches. Be sure to check Supported Platforms on PeopleSoft Customer Connection (discussed next) to verify time-sensitive information, such as supported versions of additional software components used with PeopleTools. To find the hardware and software requirements guide, sign on to PeopleSoft Customer Connection, select Site Index, select the letter H, select the entry hardware and software requirements, and then select PeopleTools.

- Supported Platforms on PeopleSoft Customer Connection provides the most current support information on hardware platforms, RDBMS versions, client connectivity versions, required compiler versions, and additional component versions.

The information in this database supplements and supersedes any information in the Enterprise PeopleTools 8.49 Hardware and Software Requirements book. To go to Supported Platforms, sign on to PeopleSoft Customer Connection, and select the link Implement, Optimize + Upgrade. Then select Implementation Guide, Supported Platforms, PeopleSoft Enterprise.

- Before you begin your installation, read the version of the document "Required Operating System, RDBMS & Additional Component Patches Required for Installation" that is appropriate for your database platform and other configuration.

See "Required Operating System, RDBMS & Additional Component Patches Required for Installation," PeopleSoft Customer Connection (Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms, PeopleSoft Enterprise.)

Task 1-3: Considering Project Planning

Identify the maintenance schedule for upcoming PeopleTools and application releases. These releases are typically on a regular schedule (for example, quarterly, biannually) and should be included in your project planning and budgeting processes. Release dates are posted on Customer Connection. It is important to plan regular maintenance in your overall project plans. For example, for a year-long enterprise upgrade, development, and conversion project, make sure to set aside time for applying the PeopleTools minor releases that ship during that time frame. Otherwise, if you fall behind, you may find that you need a fix shipped with one of the minor releases that cannot be backported as a patch.

Task 1-4: Planning Your Initial Configuration

This section discusses:

- Understanding Workstations
- Defining the File Server
- Defining the Database Server
- Defining the Application Server
- Defining the Batch Server
- Defining the Web Server
- Using Laser Printers

Note. COBOL is not needed for PeopleTools or for applications that contain no COBOL programs. Check Supported Platforms on Customer Connection for details about whether your application requires COBOL.

For more information on COBOL navigate to the COBOL Requirements page by doing the following steps:

1. Go to <http://www.peoplesoftcustomer.com>
2. Enter your User Name and Password, and click "ENTER"
3. From the respective drop boxes, choose the "Customer" or "Partner" site that you wish to enter, and click on the corresponding "Customer" or "Partner" button.
4. Under "PeopleSoft Home", click on "Implement, Optimize + Upgrade".
5. Click on Implementation Guide —> Supported Platforms —> PeopleSoft Enterprise.
6. Click on any one of the "By PeopleTools release" links.
7. In the Platforms Communications box, click on "By Topic".
8. Click on "Batch".

Understanding Workstations

This section discusses:

- Using the PeopleTools Development Environment (Windows-Based Clients)
- Using Workstations Equipped with Supported Web Browsers

Note. With the PeopleSoft Pure Internet Architecture, Windows-based clients are primarily used as a development environment. End users can use any machine equipped with a supported web browser.

Using the PeopleTools Development Environment (Windows-Based Clients)

Windows-based clients are now called the PeopleTools Development Environment. These clients—which run on Windows XP and Windows Server 2003—can connect to the PeopleSoft database directly using client connectivity software (a two-tier connection) or through a PeopleSoft application server (a three-tier connection).

Three-tier connectivity offers great performance advantages over two-tier (especially over a WAN), reduces network traffic, and generally does not require that you install database connectivity on the client. However, any Windows-based clients that will be running Data Mover scripts against the database, or running COBOL or Structured Query Report (SQR) batch processes on the client, must have database connectivity installed.

You need to have the PeopleTools Development Environment set up to create your database. For more information on setting up the PeopleTools Development Environment, refer to the following PeopleBook.

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*, "Using PeopleSoft Configuration Manager."

For installation purposes, you must set up at least one Windows-based client for sign-on using a two-tier connection to the database, so that it can create and populate the PeopleSoft database. This documentation refers to this client as the install workstation. Depending on your installation plan, you may want to set up more than one install workstation so that you can perform asynchronous installation tasks in parallel.

Note. The Windows machine that you use to perform your PeopleTools installation must be running in 256-color mode or higher when running the CD install, Internet install, and Database configuration in Windows. This is not necessary for UNIX or console mode.

Using Workstations Equipped with Supported Web Browsers

To run the PeopleSoft Pure Internet Architecture, the client workstation only needs a web browser that is HTML 4.0 compliant. You may need an additional workstation for demonstration and testing purposes if you plan to use a browser running on a platform other than Windows—such as Macintosh or UNIX.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.

Task 1-4-1: Defining the File Server

The file server is the environment (or file) repository for the PeopleTools Development Environment, which is needed for the Database Configuration Wizard. The file server is also the repository for the files necessary to perform an upgrade. This includes Upgrade Assistant or Change Assistant, and all of the executables and scripts that are necessary to perform an upgrade. In addition, the file server is a source repository for COBOL and SQR (you will apply patches and updates from Customer Connection directly to the file server and then copy the updated files to your other servers).

Important! Remember, a COBOL compiler is not needed for PeopleTools unless your application contains COBOL programs. If your application requires COBOL and you're running on Windows, we require that you maintain a central repository of your COBOL source code on the Windows file server.

See the following task later in this chapter for details on where you should install your COBOL compiler.

See Installing Supporting Applications.

If you follow the default procedures recommended in this documentation, the install workstations, Windows batch servers, and Windows report servers will access the PeopleSoft files on the file server by pointing to a directory conventionally referred to as <PS_HOME> on a shared network drive. You can install SQR and Crystal Reports on the file server, or install them locally on Windows batch servers and on Windows-based clients that will be running these processes locally.

Task 1-4-2: Defining the Database Server

The servers that host your PeopleSoft databases need sufficient processing, storage, and networking resources to process the database requests, store the data and transaction logs, and communicate freely to the clients of this data. These databases will include your own PeopleSoft database prototypes as well as any system and demonstration databases delivered directly from PeopleSoft on the PeopleSoft CDs.

See Planning Database Creation.

Database sizes vary depending on the applications that you install. The size of your prototype PeopleSoft database will also depend on the amount of data to be converted from your legacy system. A good rule of thumb for estimating the size of your prototype PeopleSoft database is to estimate the amount of disk space needed for the data to be converted from your legacy system, add to this the size required for the PeopleSoft System database, and then add an additional 50 percent of this combined figure to allow for growth.

Task 1-4-3: Defining the Application Server

The application server is the centerpiece of the PeopleSoft Pure Internet Architecture. It connects to the PeopleSoft database and handles almost all SQL-intensive interactions with the database server required during online transaction processing. Windows-based clients, in three-tier, communicate with the application server using Tuxedo messages. In the PeopleSoft Pure Internet Architecture, the application server interacts with user workstations through a web server.

The application server also provides functionality required for application messaging and for implementing the PeopleSoft Pure Internet Architecture. An application server is required in all PeopleSoft installations.

For Microsoft SQL Server the application server will run on a Windows-based server too. PeopleSoft recommends a physical three-tier configuration, which means the application server will reside on a separate server than the database server. If performance for both the database server and the application server is not an issue, you can run both on the same server—a logical three-tier configuration.

See SQL Server books online.

All application servers require database connectivity to the database server. Before beginning your installation, make sure that you can connect from the application server to the database server using a SQL client tool. This topic will be addressed later in this chapter.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Internet Technology

Task 1-4-4: Defining the Batch Server

The term *batch server* is equivalent to the term *Process Scheduler server*. PeopleSoft batch processes, such as COBOL and SQR, are scheduled and invoked by a Process Scheduler server. In almost all configurations, batch server SQR and COBOL files are located and executed on the same computer as the database server.

For Microsoft SQL Server databases, a Process Scheduler located on the batch server can point to and invoke files that are physically located on the file server.

PeopleSoft supports setting up the batch environments on a dedicated server, an application server, or even on the database server.

Any computer operating as a batch server must have database connectivity installed so that it can make a two-tier connection to the PeopleSoft database.

See Also

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler

Task 1-4-5: Defining the Web Server

A web server is required to run the PeopleSoft Pure Internet Architecture. The PeopleSoft Pure Internet Architecture is certified to work with either of the following three J2EE web application servers (also commonly referred to as web servers):

- Oracle Application Server
- BEA WebLogic Server
- IBM WebSphere Server

You can refer the PeopleTools 8.49 Hardware and Software Guide or the Supported Platforms database on Customer Connection for supported web server combinations.

In conjunction with BEA WebLogic and IBM WebSphere, PeopleSoft has also certified the use of the following HTTP servers as reverse proxy servers (RPS):

- With Oracle Application Server, Oracle/PeopleSoft supports the Oracle HTTP Server and Oracle Application Server Web Cache as reverse proxy servers.
- With BEA WebLogic, the certified HTTP servers are Microsoft IIS, iPlanet web server, Apache HTTP server, and BEA WebLogic Server.
- With IBM WebSphere, the certified HTTP servers are IBM HTTP Server (IHS), Microsoft IIS, and iPlanet web server.

WebLogic, WebSphere, and the above reverse proxy servers will provide out-of-the-box SSL support across all supported operating systems. WebLogic and WebSphere provide demo digital certificates, but for production grade SSL you must purchase digital certificates from a Certificate Authority supported by the web server that you are using (for example, Verisign, Baltimore, Entrust, and so on).

Task 1-4-6: Using Laser Printers

Along with the printer you will need a Windows printer driver to print the online reports that produce 180-character-wide reports using the HP LinePrinter font. Your printer must be configured with sufficient memory (typically 1.5 MB) to produce graphics images for page printouts.

See Also

Verifying Hardware and Software Requirements

Enterprise PeopleTools 8.49 Hardware and Software Requirements

Supported Platforms, PeopleSoft Customer Connection (Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms, PeopleSoft Enterprise)

Task 1-5: Planning Database Creation

This section discusses:

- Understanding Database Creation
- Determining Databases and Database Names
- Defining Microsoft and PeopleSoft Databases

Understanding Database Creation

When performing a PeopleSoft installation, you will create these types of PeopleSoft databases:

- System (also called SYS) databases, which contain the PeopleTools and product-specific metadata required for development of a production database.
- Demo (DMO) databases, which are populated with sample data for study, demonstration, or training purposes.

Note. To properly install a Demo database, you must select both the System Database and the Demo Database options during the installation of PeopleSoft applications.

Task 1-5-1: Determining Databases and Database Names

Before you begin the installation process, you should determine how many PeopleSoft databases (System or Demo) of which type you need and how you intend to use them. You should also determine the names of the databases at this point, using database names that:

- Are limited to eight characters, all UPPERCASE.
- Capture information about the PeopleSoft product line and the type of database.

For example, you may want to create two databases with the names PSHRDMO and PSHRSYS, using the two characters HR (for Human Resources) to indicate the product line.

Note. Microsoft SQL Server allows you to create database names that begin with a number (as in 8PTDMO). However, database names that begin with a number are not valid PeopleSoft database names and will result in errors.

Task 1-5-2: Defining Microsoft and PeopleSoft Databases

The terms Microsoft database and PeopleSoft database have essentially the same meaning. A PeopleSoft database is a set of SQL objects defined as having the same owner ID. These objects are always within a single Microsoft database. A Microsoft SQL Server may hold more than one PeopleSoft database, but only one PeopleSoft database may reside in a Microsoft database. A PeopleSoft database includes the PeopleSoft objects and application data for one or more products in a PeopleSoft product line. Each PeopleSoft database has a database owner, known as the access ID. The access ID is a login with system administration privileges. Make sure that the access ID and its password do not exceed eight characters in length. This is a PeopleSoft requirement for the access ID.

Note. When installing the PeopleSoft database do not use *sa* as your access ID. Instead use an equivalent login with system administration privileges.

The levels of security provided by Microsoft are:

- The operating system
- The Microsoft SQL Server
- The server's databases
- The database's objects

All of the objects in a PeopleSoft database will be owned by the owner ID. Only the connect ID will be granted SELECT access to the signon tables. SELECT access will be granted on three tables—PSSTATUS, PSACCESSPRFL, and PSOPRDEFN—for the PeopleSoft connect ID.

Task 1-6: Planning Multilingual Strategy

This section discusses:

- Understanding Multilingual Issues

- Choosing a Base Language
- Selecting Additional Languages
- Selecting a Database Collation

Understanding Multilingual Issues

Before beginning your installation, you should determine which languages your PeopleSoft system will need to support. If multiple languages are required, determine which language will be used most often. These decisions will affect tasks at various stages of the installation, including file server setup, database creation, and the ability to change the base language of the PeopleSoft database after it is created. Even if you do not plan on running your system in more than one language, you should decide the following information before completing this task:

- Database base language
- Additional languages (if any)
- Database character set

The current languages provided by PeopleSoft and their language codes are listed below. These are the languages for which PeopleSoft provides pretranslated products. If you plan to provide users access to your applications in these languages, PeopleSoft recommends that you install the translations during your initial installation. This approach will keep you from having to perform an upgrade if you decide to add the PeopleSoft-provided translations at a later date. After installation, you also have the option of performing your own translations, and adding additional languages.

Code	Language
ARA	Arabic
CFR	Canadian French
CZE	Czech
DAN	Danish
DUT	Dutch
ENG	US English
FIN	Finnish
ESP	Spanish
FRA	French
GER	German
HUN	Hungarian
ITA	Italian
JPN	Japanese

Code	Language
KOR	Korean
NOR	Norwegian
POL	Polish
POR	Portuguese
RUS	Russian
SVE	Swedish
THA	Thai
ZHS	Simplified Chinese
ZHT	Traditional Chinese

Note. PeopleSoft MultiChannel Framework users who want to display certain Japanese characters should install JDK 1.5.

See Also

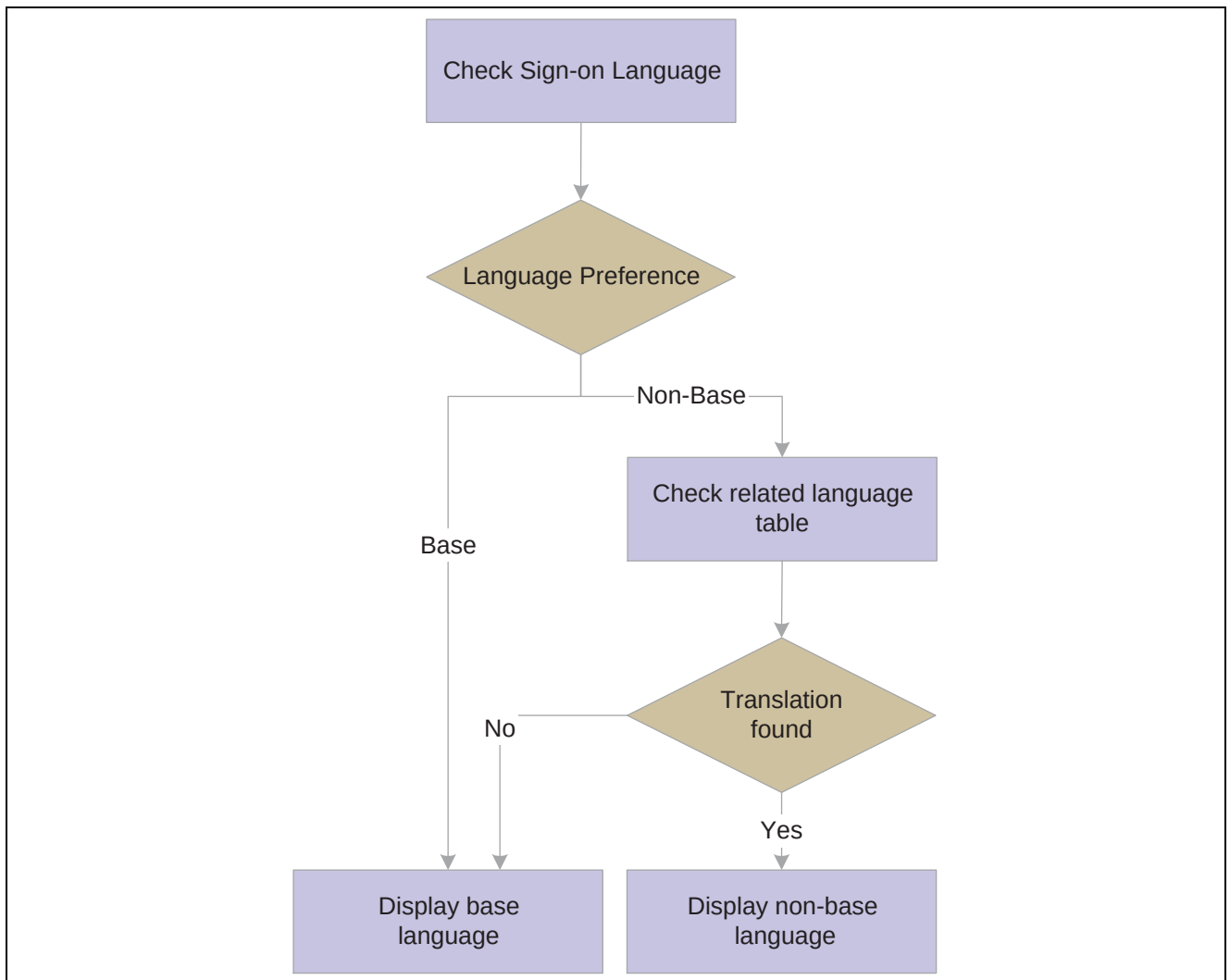
Enterprise PeopleTools 8.49 PeopleBook: Global Technology

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft MultiChannel Framework

Task 1-6-1: Choosing a Base Language

Each PeopleSoft database can have only one base language. PeopleSoft databases ship with English as the default base language. Typically, the base language of your database should match the language most commonly used by your organization, as it affects the performance of PeopleSoft applications.

When PeopleTools attempts to open language-sensitive objects (such as pages and menus), it first compares the operator's preferred language to the base language of the database. If the preferred language matches the base language, PeopleTools immediately loads the required definition from the base language PeopleTools tables. However, if the user's preferred language differs from the database's base language, PeopleTools must first query the related language tables for the object. Should a translation of the object not be found in the operator's preferred language, a query is then performed on the base language tables. The following flowchart shows this logic:



Language selection process

While these queries typically occur very quickly, they still take up valuable processing time. To optimize performance you should set the base language of your database as the language that is used most often by your users.

Task 1-6-2: Selecting Additional Languages

Because more than one language can coexist in a single PeopleSoft database, you should decide which languages to install. PeopleSoft provides translations of all end-user objects on the Global Multi-Language CD. It is much easier to install additional languages upon initial database creation than to add them later in your implementation process, so we recommend that you choose which additional languages may be required now. There is no limit to the number of languages that can coexist in a single PeopleSoft database; however, remember that each language will require additional storage space, primarily for PeopleTools objects.

Task 1-6-3: Selecting a Database Collation

This section discusses:

- Understanding Database Collation
- Using Non-Unicode Databases

- Using Unicode Databases

Understanding Database Collation

Depending on the languages that you are planning to select for your PeopleSoft installation, you need to determine which collation you will use during the Microsoft SQL Server installation. First you must determine whether you need a Unicode database.

Using Non-Unicode Databases

Use these considerations for environments that support one language: The suggested collation for most PeopleSoft databases is Latin1_General_Bin. This supports Western European languages (English, Danish, Dutch, Finnish, French, German, Italian, Norwegian, Portuguese, Spanish, and Swedish). If the language you will use is not in this list you may need to install a Unicode database, because not all the languages are supported on non-Unicode databases. Otherwise the default options will work.

Use these considerations for environments that support several languages or non-Western European languages: If all the required languages you will use share the same Windows locale id or code page you do not need to install a Unicode database. Simply decide which collation you need to use when setting up your server and database, using the table below as a reference. The table shows a list of collations and the languages they support (the list does not show all the languages supported by PeopleSoft):

Collation	Languages Supported
Latin1_General_Bin	Western European or Latin-1. (All Western Europe: English, Danish, Dutch, Finnish, French, German, Italian, Norwegian, Portuguese, Spanish, and Swedish)
Japanese_General_Bin	Japanese, English

Note. In addition to *_BIN collations, all the *_AS_CS_WS_KS collations are supported, where “*” can be any language listed above.

Using Unicode Databases

Unicode enables you to maintain data in virtually any modern language in a single database. Prior to Unicode, many languages could not coexist in one database, as they did not share a common character set. On Microsoft SQL Server, Unicode databases differ from non-Unicode databases because they use the NCHAR data type instead of CHAR for character data. Unicode databases are particularly important if the languages that you selected do not share the same character set. Typically, a single character set can encode all languages written in a single script. For example, English, French, and Spanish all share the same script (Latin), so they can coexist in a non-Unicode database. However, Japanese does not share the same script as French, so if you need to have Japanese and French coexist in a single system, you need a Unicode database.

Note. The characters required for the English language exist in all Unicode and non-Unicode character sets. For example, Japanese and unaccented English can coexist in a single Unicode or non-Unicode database.

If you plan on installing or supporting a combination of languages that do not share the same character set, you should use a Unicode database. The primary disadvantage of a Unicode database is the disk space it requires. On Microsoft SQL Server, Unicode characters require 2 bytes of storage each, so a typical PeopleSoft database will require approximately 40 percent more disk space than a non-Unicode database.

In addition to the languages mentioned above, supported languages like Arabic, Czech, Chinese, Greek, Hebrew, Hungarian, Korean, Polish (Latin2), Russian, Thai or Turkish are supported only with Unicode databases. The following is a list of collations you may want to use for each of these languages:

Collation	Languages Supported
Arabic_BIN	Arabic, English
Chinese_PRC_BIN	Chinese, English
Chinese_Taiwan_Stroke_BIN	Chinese, English
Cyrillic_General_BIN	Russian, English
Czech_BIN	Czech, English
Greek_BIN	Greek, English
Hebrew_BIN	Hebrew, English
Hungarian_BIN	Hungarian, English
Korean_Wansung_BIN	Korean, English
Polish_BIN	Polish, English
Thai_BIN	Thai, English
Turkish_BIN	Turkish, English

Remember that all characters required for English are defined in all Unicode and non-Unicode character sets.

Note. If you plan to download a grid to Excel97, and you want to use the character set defined in the user language, that is, other than the default UTF-8 character set, you must select the EXCEL97 option on the Personalizations page and set its Option Value to Y. This option is only recommended for non-English users who use Excel 97. It is not recommended for Excel in Microsoft Office 2000 and above.

See *Enterprise PeopleTools 8.49 PeopleBook: Global Technology*, “Reporting and Analyzing Global Data.”

Task 1-7: Reviewing Updates and Fixes Required at Installation

Before beginning the installation, check the Updates and Fixes database on PeopleSoft Customer Connection to identify any updates and fixes required at installation that you will need to apply, based on the products, product version, and PeopleTools version that you are installing. Specific instructions for applying the updates and fixes are included in each listed incident.

Make note of all the updates and fixes, and plan to apply them at appropriate stages during the installation procedure. For example, a replacement for a PeopleTools executable would be applied after installing the CDs to the appropriate server, and so on.

The following procedure describes how to access the Updates and Fixes database. Contact PeopleSoft if you don't have a user ID and password for PeopleSoft Customer Connection.

To review updates and fixes required at installation:

1. Go to the PeopleSoft Internet Home Page at www.peoplesoft.com.
2. Select the link Log in now under Customer Connection.
3. Enter your user name and password to log in.

Note. Be sure to log on, or you will not see all of the menu options.

4. Select Updates and Fixes.
5. Select Required for Install or Upgrade.
6. Select PeopleTools as the product line, PeopleTools as the product, and select the appropriate PeopleTools release.

Make sure that the Required for Install option is selected and click the search button (the arrow).

7. Note any PeopleTools updates and fixes that apply to your installation.
8. Return to the Updates and Fixes search page and search for any application-related incidents by selecting the appropriate product line, product, and release.

Make sure the Required for Install option is selected and click the search button (the arrow).

9. Note any application-specific updates and fixes that apply to your installation.

Note. Keep in mind that your installation may require additional software components. In this case you will also need to check for updates and patches for the additional component software. Later chapters cover this topic in detail.

After this installation, you can upgrade your Java Runtime Engine (JRE) to a newer version without upgrading PeopleTools, as long as the new JRE is certified.

See Also

“Installing Web Server Products”

“Installing Additional Components”

“Required Operating System, RDBMS, and Additional Component Patches Required for Installation,” PeopleSoft Customer Connection (Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms, PeopleSoft Enterprise. Select your database platform.)

Task 1-8: Installing Supporting Applications

PeopleSoft requires that a number of supporting applications be installed on batch servers and on any Windows-based client on which batch processes will be run locally. (Throughout the rest of this section we refer to these Windows-based clients as *two-tier clients*.) Be sure to check PeopleSoft Customer Connection to ensure that you are installing software versions that are certified by PeopleSoft.

- For PeopleSoft applications written in COBOL, install the appropriate version of the COBOL compiler on the server where you will compile:

Note. Remember, COBOL is not needed for PeopleTools or for applications that do not contain COBOL programs. See PeopleSoft Customer Connection to verify whether your application requires COBOL.

See “Task “Planning Your initial Configuration” in the Chapter “Preparing for Installation” of this Guide for information on how to navigate to the COBOL Requirements web page.”

- For Windows servers, install the appropriate version of Micro Focus NetExpress.
- If all your servers are on Windows, we recommend that you install a COBOL compiler on the file server.

You can install PeopleTools plus any patches on the file server, compile your COBOL there, and then copy the COBOL binaries to your application and batch servers.

Note. Before PeopleTools 8.4, PeopleSoft delivered both source and compiled COBOL for Windows users. From 8.4 onwards, we deliver source only. If your application requires COBOL, you will need to compile it.

If your application requires COBOL it is not necessary to install the COBOL runtime on every application and batch server. But it IS NECESSARY to install the COBOL runtime license on each application and batch server where COBOL programs will be executed.

- On Windows batch servers and Windows two-tier clients, you have the option of installing SQR locally, or mapping to a copy installed on the file server.

Because SQR does not require any local registry settings, you can execute SQR from any Windows batch server or two-tier client once SQR has been installed to a shared directory. Installing SQR locally will result in improved performance; over a slow network connection the improvement will be significant.

- Install Microsoft Office (Excel and Word) on any Windows batch server or two-tier client that will be running nVision or Microsoft Word batch processes.

Microsoft Office must be installed locally, because it requires registry settings.

See Also

Enterprise PeopleTools 8.49 Hardware and Software Requirements

Task 1-9: Installing Microsoft SQL Server 2000

This section discusses:

- Understanding Microsoft SQL Server 2000
- Installing SQL Server 2000 on the Database Server
- Installing SQL Server 2000 on Additional Servers
- Installing SQL Server 2000 (SP3a Minimum)

Understanding Microsoft SQL Server 2000

Microsoft SQL Server 2000 SP3a is the minimum requirement for PeopleTools 8.46 and above. The following information is provided to help you install SQL Server 2000 for use with PeopleSoft. It highlights those aspects of a new SQL Server 2000 installation that are needed for PeopleSoft, to reduce potential problems.

For PeopleTools 8.48, you can also install your database on Microsoft SQL Server 2005. You can find information on using PeopleTools 8.48 with Microsoft SQL Server 2005 in the appendix “Installing Microsoft SQL Server 2005,” and tips on migrating a PeopleSoft database from Microsoft SQL Server 2000 to Microsoft SQL Server 2005 in the appendix “Upgrading to Microsoft SQL Server 2005.”

See Also

Microsoft SQL Server 2000

SQL Server 2000 Books Online

Microsoft support services, <http://support.microsoft.com/>

Task 1-9-1: Installing SQL Server 2000 on the Database Server

To install SQL Server 2000 on the database server:

1. Run autorun.exe from your SQL Server 2000 CD.

You should have administration privileges on the server to run the install. Note that there are different editions of SQL Server 2000, so make sure that the edition you install is appropriate for your requirements. Please consult SQL Server books online and contact Microsoft support for more information about supported versions.

2. Choose to install components (assuming you have installed any prerequisites).
3. Create a new instance of SQL Server.
4. Install both Server and Client tools.
5. Perform a default installation (named instances are also supported but for simplicity default installation is the preferred method).
6. Choose the option Custom.
This selection enables you to specify the appropriate collation you need for PeopleSoft databases, and to choose a destination folder for the program files and data files. A root level choice such as e:\ or d:\ is convenient because the path to the SQL Server binaries then becomes a simple e:\mssql\binn, and so on.
7. Select the components you want to install (typically all of them).
8. Specify your service accounts. Select *Use the local system account* so you do not tie the software with the account you are using.
9. Select Mixed Mode for authentication, and make sure to assign a password.

Important! Be sure to assign a password. (A blank password is *not* compatible with PeopleSoft databases.)

10. Under Collation Settings, select the option Collation designator and select *Latin1_General*. Select Binary for the sort order (or use the collation chosen in the section “Selecting a Database Collation.”)
11. Do not change the Network libraries setting.
12. At the Start Copying Files dialog, click Next to begin the installation.

Note. Install your Microsoft SQL Server software with the collation setting to be used on your PeopleSoft databases.

Task 1-9-2: Installing SQL Server 2000 on Additional Servers

You only need to install the SQL Server client tools for the clients that need to communicate with the database, such as the application server and batch server. (For PeopleSoft applications you only need to install the connectivity tools, but you might as well install the rest of the client tools.) To install the client execute `autorun.exe` and choose to install Client tools only. Accept the defaults during the installation process.

Task 1-9-3: Installing SQL Server 2000 (SP3a Minimum)

PeopleSoft recommends the installation of SP3a, which include important SQL Server security updates. Please review and apply if necessary the fixes listed as required for installation at PeopleSoft Customer Connection.

See “Required Operating System, RDBMS and Additional Component Products Required for Installation,” PeopleSoft Customer Connection, (Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms, PeopleSoft Enterprise. Under Server Environments/Database Server select By PeopleTools Release, PeopleTools 8.48 or the appropriate release, MS SQL Server 2000 SP3a or MS SQL Server SP4).

A link to the list of fixes required for installation is available at every PeopleSoft certification report. In addition, you can search PeopleSoft Customer Connection for fixes required for installation.

See PeopleSoft Customer Connection (Updates + Fixes, Required for Install or Upgrade).

Make sure *Auto Update stats* and *Auto Create stats* are enabled for your PeopleSoft database.

You can use the Enterprise Manager to verify if those options are enabled on your database. Open Enterprise Manager, select the database, and right-click to select the properties. The Options tab contains a check box for each option. You can also use `sp_dboption` to display and enable these features.

Task 1-10: Increasing the Size of Tempdb

The PeopleSoft-recommended configuration includes increasing the size of tempdb. Microsoft SQL Server creates an 8.5 MB temporary database, tempdb, upon installation. Tempdb is a shared workspace used for temporary tables, sorting, and other temporary work storage needs. By default, in Microsoft SQL Server 2000, tempdb is set to grow automatically. However, PeopleSoft uses tempdb extensively and recommends increasing its size by a minimum of 15 percent to 20 percent the estimated final size of your database. Another good practice is to distribute tempdb into several data files of the same size; as a guideline you may want to have one per each processor assigned for SQL Server. If possible spread these datafiles on a high performance disk array.

Because auto-grow on tempdb may affect the database overall performance it is important to assign the right size to tempdb. Auto-grow should never occur on a properly sized production environment.

Note. Make sure your tempdb resides on a different disk device than your data and your database log.

Task 1-11: Installing Client Connectivity

Install client connectivity on any Windows-based client workstation(s), any Windows batch servers, and any Windows application servers. You can find the client connectivity files on your Microsoft SQL Server CD.

Note. Remember that connectivity is only required for Windows-based client workstations that are being used as the PeopleTools Development Environment. Normal end users will not require database connectivity; they will just need a machine with a supported browser installed.

Note. Microsoft service packs often include updates to client connectivity files—including the Microsoft SQL Server ODBC driver `SqlSrv32.DLL`. When installing service packs, you should always check for updated client connectivity files and install them on your workstations. Refer to your Microsoft SQL Server documentation for information on applying service packs.

A common error is to apply Microsoft SQL Server service packs to the server only. Service packs generally should be applied to both the Windows-based client and the server, because they typically include changes that affect connectivity files.

Task 1-12: Performing Backups

Before proceeding, you should back up all servers and workstations that are set up for installation so you can recover to this point if necessary. Do the following:

- Back up any changes you made to the database server in setting up your PeopleSoft system.
- Back up any changes you made to your file server while setting aside space for your PeopleSoft system and setting up access privileges.
- Once you set up your install workstations to access the file server and database server simultaneously, back up the workstations.

Task 1-13: Using PeopleSoft Change Assistant and PeopleSoft Change Impact Analyzer

After you have completed the tasks in this book to install PeopleTools, including installing any necessary patches and fixes, you need to install PeopleSoft Change Assistant. PeopleSoft Change Assistant is a standalone application that enables you to assemble and organize all of the steps necessary to apply patches and fixes for maintenance updates.

PeopleSoft Change Assistant gathers all the necessary information for a maintenance update from the Environment Management Hub and uploads it to PeopleSoft Customer Connection. With the environment data available, PeopleSoft Customer Connection can determine what updates are applicable to your environment. PeopleSoft Change Assistant carries out the following tasks:

- Uploads environment
- Finds required updates
- Downloads updates
- Applies all change packages

You can also install PeopleSoft Change Impact Analyzer, either as part of the PeopleTools installation, or by itself. PeopleSoft Change Impact Analyzer is a Windows-based tool that you can use to evaluate the effect of changes you make on your installation.

See Also

“Installing PeopleSoft Change Assistant”

“Installing PeopleSoft Change Impact Analyzer”

Enterprise PeopleTools 8.49 PeopleBook: Software Updates

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Change Impact Analyzer

CHAPTER 2

Installing Web Server Products

This chapter discusses:

- Installing Oracle Application Server
- Installing BEA WebLogic Server
- Installing WebSphere Application Server 6.1

See Also

“Clustering and High Availability for PeopleSoft 8.4,” PeopleSoft Customer Connection (Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Red Paper Library)

“Required Operating System, RDBMS, and Additional Component Patches Required for Installation,” PeopleSoft Customer Connection (Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms, PeopleSoft Enterprise. Select your database platform or release number.)

Task 2-1: Installing Oracle Application Server

This section discusses:

- Understanding the Oracle Application Server Installation
- Prerequisites
- Preparing for the Oracle Application Server Installation
- Installing the Oracle Application Server on Windows and UNIX
- Installing Patches
- Uninstalling Oracle Application Server 10g Release 3 (10.1.3.1)

Understanding the Oracle Application Server Installation

This section describes the installation of Oracle SOA Suite 10g Release 3 (10.1.3.1). This documentation is concerned only with the installation of OAS for use as a web server with PeopleSoft software. Further information on the configuration of OAS can be found on PeopleSoft Customer Connection and on the Oracle web site.

Before beginning the installation, be sure to obtain any required patches for the installation from <ftp://ftp.peoplesoft.com/outgoing/ptools/Oracle/OAS/10131>.

Important! PeopleSoft customers are granted a license of Oracle SOA Suite 10g Release 3 to use exclusively with PeopleSoft Enterprise at no additional cost. PeopleSoft Enterprise customers can choose Oracle Application Server SOA Suite 10g Release 3 with J2EE and Web Server option as an alternative to BEA WebLogic or IBM WebSphere for use with PeopleSoft Enterprise. This license is provided solely for use with PeopleSoft Enterprise and any other use of Oracle SOA Suite Release 3 outside of use with PeopleSoft Enterprise requires the purchase of an Oracle Application Server license.

See Also

Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration, “Working with Oracle Application Server 10g Release 3 (10.1.3.1)”

Oracle Application Server 10g Release 3(10.1.3.1) Documentation, <http://www.oracle.com/technology/documentation/appserver10131.html>

Prerequisites

The OAS can be used as a web server for Enterprise PeopleTools for the following operating systems:

- Windows
- Solaris
- HP-UX (Risc and Itanium)
- Linux
- AIX

See “Preparing for Installation,” Defining the Web Server.

For a complete list of prerequisites, see the installation documentation for the OAS on Oracle’s web site.

See <http://www.oracle.com/technology/documentation/appserver10131.html>. Select the View Library link for the appropriate operating system.

Task 2-1-1: Preparing for the Oracle Application Server Installation

This section discusses:

- Creating a Group for the Inventory Directory
- Creating oraInst.loc
- Creating the Operating System User
- Reviewing the Environment Variables
- Using Custom Port Numbers

Creating a Group for the Inventory Directory

If you plan to install Oracle Application Server on a computer that does not have Oracle products, create a group to own the inventory directory. The installer writes its files in the inventory directory to keep track of the Oracle products installed on the computer.

This guide uses the name *oinstall* for this operating system group.

By having a separate group for the inventory directory, you allow different users to install Oracle products on the computer. Users need write permission for the inventory directory. They can achieve this by belonging to the *oinstall* group.

For the first time installation of any Oracle product on a computer, the installer displays a screen where you enter a group name for the inventory directory, and a screen where you enter the location of the inventory directory. The default name of the inventory directory is *oraInventory*. If you are unsure if there is already an inventory directory on the computer, look in the */etc/oraInst.loc* file for Linux and AIX systems and the */var/opt/oracle/oraInst.loc* file for other UNIX platforms. This file lists the location of the inventory directory and the group that owns it. If the file does not exist, the computer does not have Oracle products installed on it.

Creating oraInst.loc

If the *oraInst.loc* file does not exist in the */etc* directory for Linux and AIX systems or the */var/opt/oracle* directory for other UNIX platforms, you must create it before starting the silent and non-interactive installation of Oracle Application Server. The installer uses this file.

1. Log in as the root user:

```
% su
```

2. Using a text editor such as *vi* or *emacs*, create the *oraInst.loc* file in the */etc* directory for Linux and AIX platforms, and in the */var/opt/oracle* directory for other UNIX platforms.
3. Enter the following line in the file, where *oui_inventory_directory* is the full path to the directory where you want the installer to create the inventory directory:

```
inventory_loc=oui_inventory_directory
```

Make sure that the *oinstall* operating system group has write permission to this directory.

See *Creating a Group for the Inventory Directory*.

4. Create an empty */etc/oratab* file:

```
# touch /etc/oratab
```

5. Exit from the root user.

```
# exit
```

Creating the Operating System User

Windows:

The operating system user performing the installation must belong to the Administrators group.

UNIX:

Create an operating system user to install and upgrade Oracle products. This guide refers to this user as the *oracle* user. The *oracle* user running the installer must have write permission for these directories:

- The Oracle home directory, which contains files for the product you are installing.
- The inventory directory, which is used by the installer for all Oracle products.

If the computer contains other Oracle products, you might already have a user for this purpose. Look in the */etc/oraInst.loc* file for Linux and AIX platforms, and in the */var/opt/oracle/oraInst.loc* file for other UNIX platforms. This file lists the location of the inventory directory and the group that owns it. If the file does not exist, the computer does not have Oracle products installed on it.

See Creating oraInst.loc.

If you do not already have a user for installing Oracle products, create a user with the following properties:

Login name	Select a name for the user. This guide uses <i>oracle</i> .
Group identifier	Select a name for the group. This guide uses <i>oinstall</i> . The primary group of the oracle user must have write permission for the oraInventory directory.
Home directory	The home directory path must not include any spaces. The home directory for the oracle user can be the same as the home directories of other users.
Login shell	The default login shell can be the C, Bourne, or Korn shell.

Reviewing the Environment Variables

Make sure the following conditions for environment variables are met:

- ENV must *not* be set.
- ORACLE_HOME AND ORACLE_SID must *not* be set.
- PATH, CLASSPATH, and LD_LIBRARY_PATH must not contain references to directories in any Oracle home directories.

Note. These variables must not be longer than 1023 characters on Windows.

- For UNIX only: Set DISPLAY to the monitor where you want the installer window to appear.
- TNS_ADMIN must not be set.
- TMP is optional. If TMP is not set, the value defaults to /tmp.
- For Linux platform only:
 - ORA_NLS33 must *not* be set.
 - LD_BIND_NOW must *not* be set.

Note. If you use the SU command to switch users (for example, switching from the root user to the oracle user), check the environment variables when you are the new user because the environment variables might not be passed to the new user.

Using Custom Port Numbers

By default, the installer configures Oracle HTTP Server to use port 7777, not port 80. Port 7777 is the default port because on UNIX, components that use port numbers lower than 1024 require additional steps to be done as the root user before the components can run. Because the installer does not have root access, it has to use a port greater than 1024.

If you want Oracle HTTP Server to use a different port, such as port 80, use the "static ports" feature, which enables you to specify port numbers for components. Although you can change the port number after installation, it is easier to set the port number during installation. The OAS cannot use port numbers that are less than 1024 and greater than 50000.

To instruct the installer to assign custom port numbers for components:

1. Create a file containing the component names and port numbers.

This file is typically called the `staticports.ini` file, but you can name it anything you want. A sample `staticports.ini` file is located at `<INSTALL_DIR>\Disk1\stage\Response`.

2. During the installation, on the Specify Port Configuration Options window, select Manual and enter the full path to the `staticports.ini` file.

If you do not specify the full path to the file, the installer will not be able to find the file. The installer will then assign default ports for all the components, without displaying any warning.

Task 2-1-2: Installing the Oracle Application Server on Windows and UNIX

This procedure describes the installation of the OAS middle tier software, which comprises the OAS J2EE and Web Server. The OAS software should be downloaded from the 8.49 PeopleSoft Enterprise media pack from Oracle E-Delivery.

See Oracle E-Delivery, <https://edelivery.oracle.com/>

Note. The installation process given below is in GUI mode. UNIX users, connect to the host using a GUI supported UNIX connection tool (Example: Reflection X).

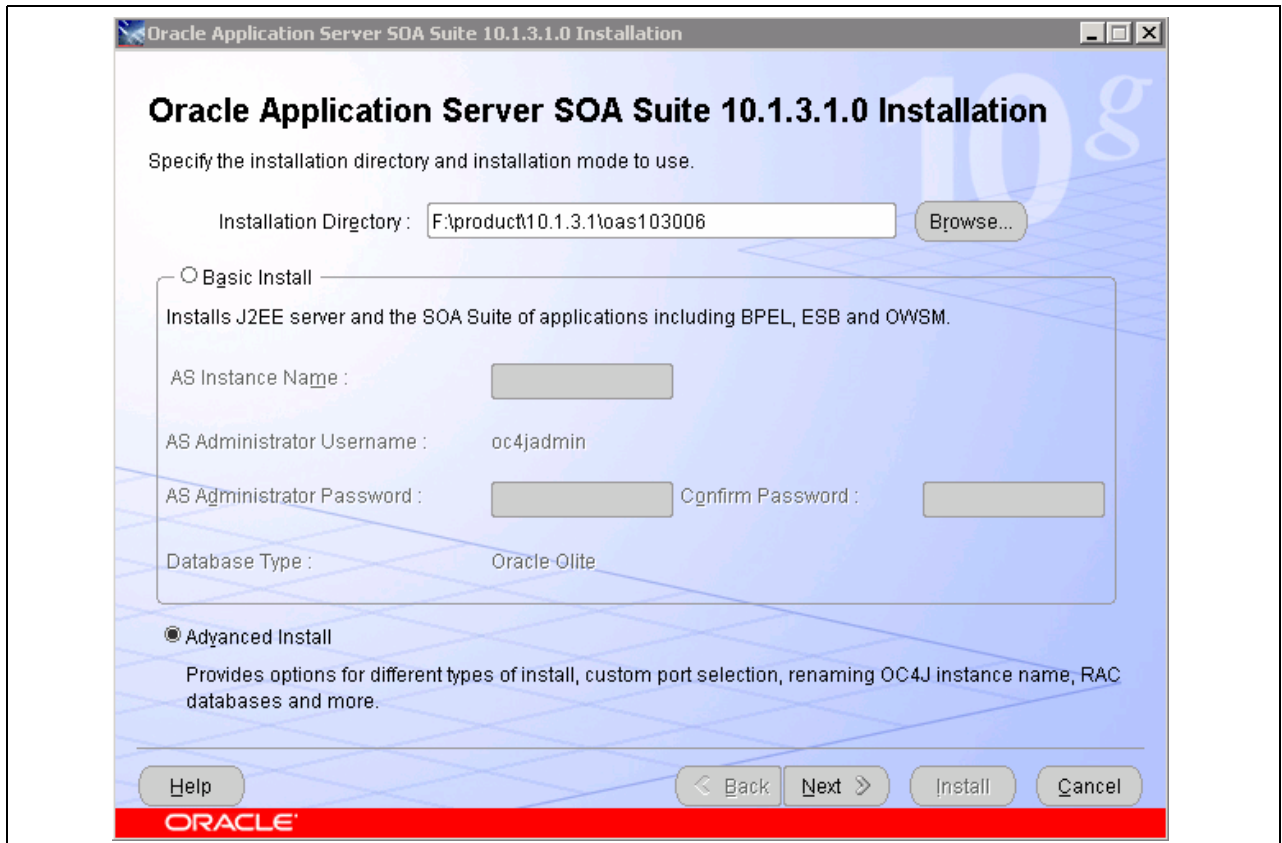
1. Download Oracle SOA Suite 10g (10.1.3.1.0) zipped files (CDs) containing the OAS from Oracle E-Delivery.
2. Create a temporary folder, `<INSTALL_DIR>`, for your operating system.
3. Extract each zipped file into a separate folder labelled `Disk<#>` under `<INSTALL_DIR>`.
4. Start the installation:

Windows: Double-click `<INSTALL_DIR>\Disk1\setup.exe`.

UNIX: Run `<INSTALL_DIR>/Disk/runInstaller`.

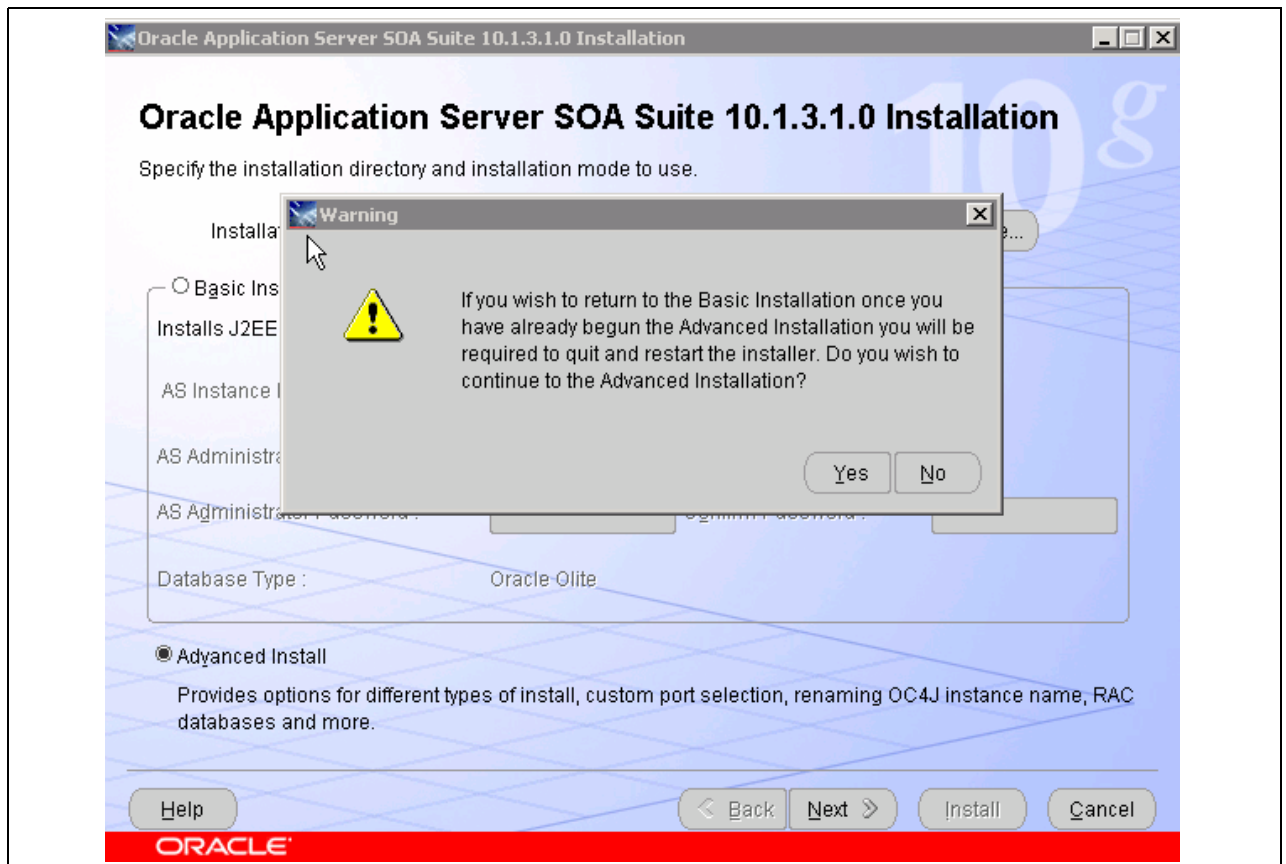
Note. For UNIX systems, installation must be run from a host using a GUI supported UNIX connection tool (such as reflection X).

5. Modify the Installation Directory to point to the location where you want to install OAS 10.1.3.1 (e.g., `C:\product\10.1.3.1\OracleAS`, unix: `/home/foo/product/10.1.3.1/OracleAS`), select Advanced Install and Click Next.



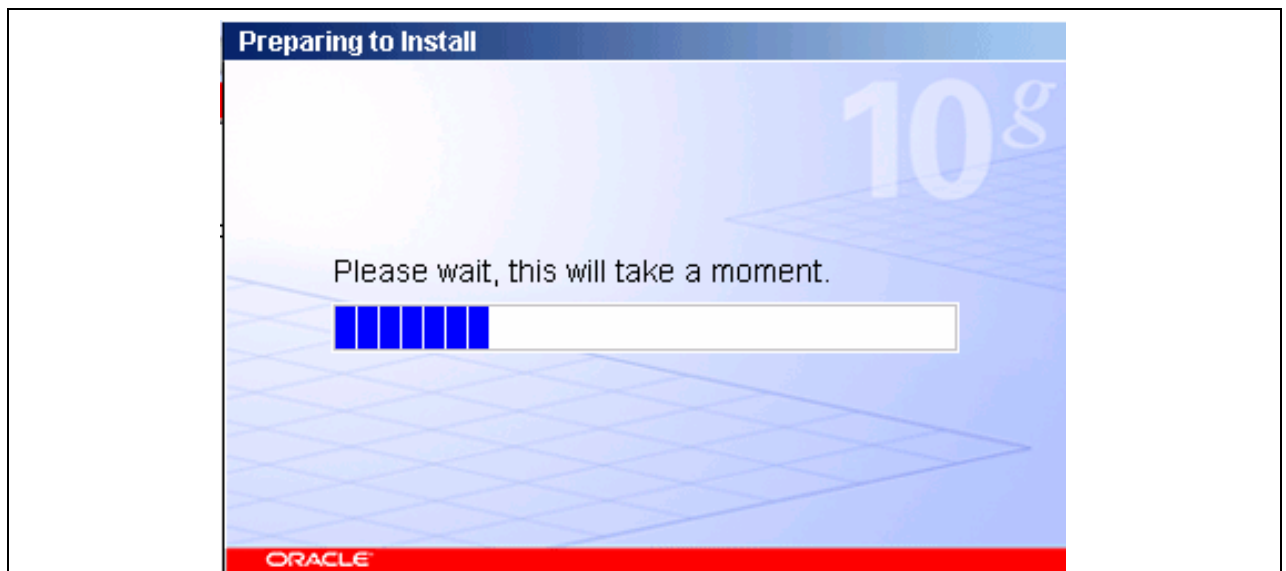
Specifying the Installation Directory — Advanced Install

6. A pop up will be displayed.



Pop up asking you to confirm if you want to continue with the Advanced Install option

7. Click Yes.



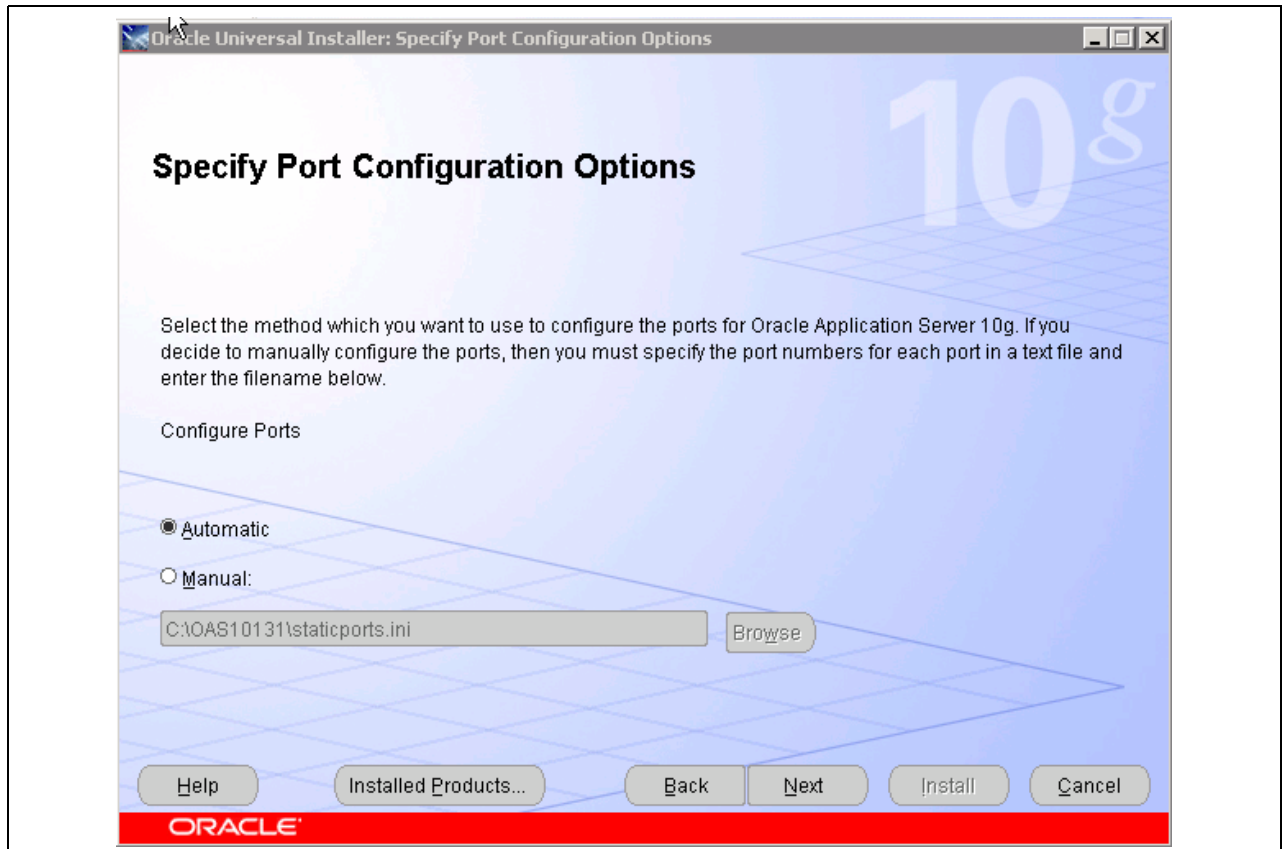
Preparing to Install

8. The Installation type selection window appears. Select Option J2EE Server and Web Server).



Select Installation Type Window

9. Click Next.



Specify Port Configuration Options Window

Select one of the following radio buttons to specify the port configuration:

- Automatic: Select this option to use the default port values.
- Manual: Select this option to instruct the installer to assign custom port numbers for components.

Specify the full path and name of the file containing the component names and port numbers.

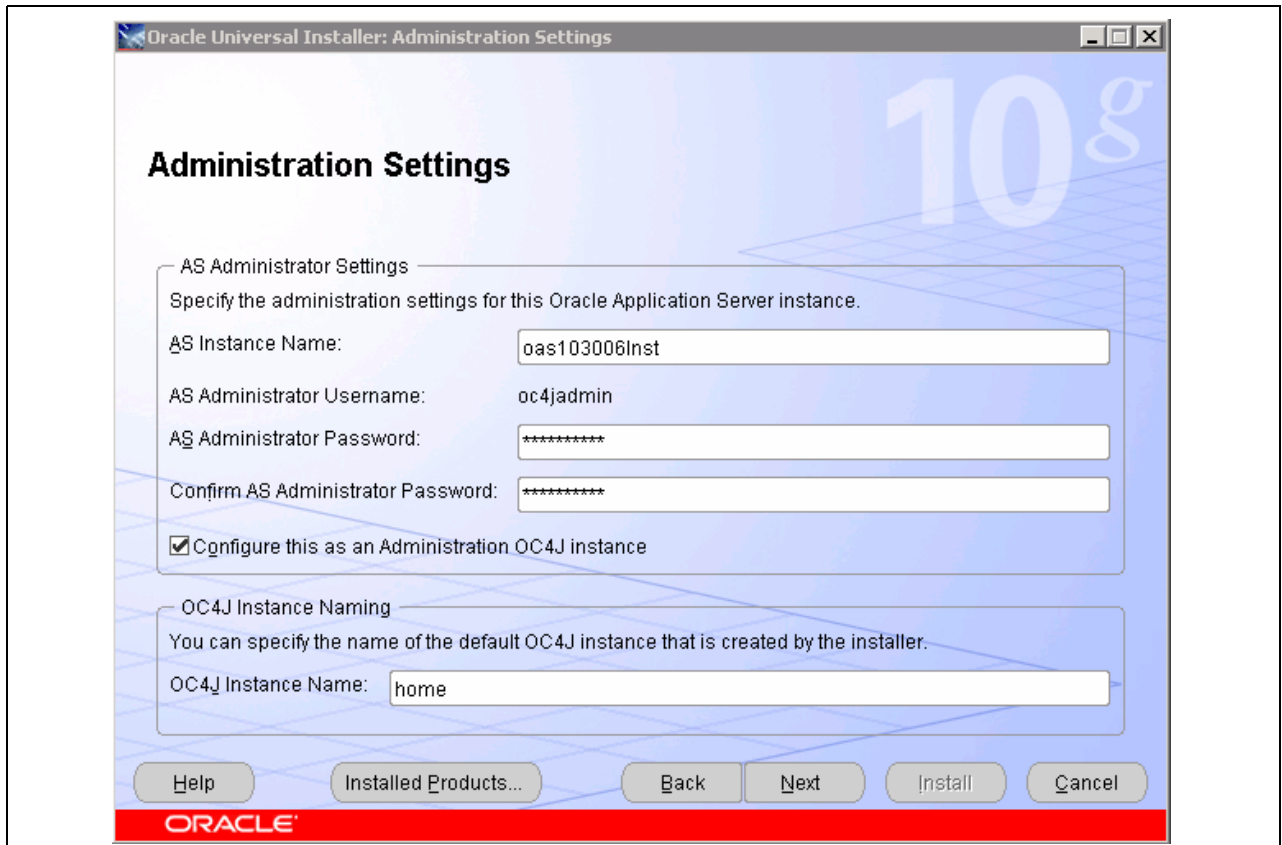
See Preparing for the Oracle Application Server Installation, Using Custom Port Numbers.

10. Click Next.

Specify AS Instance Name, AS Administrator Password. The Oracle instance name can be different from the Oracle home name.

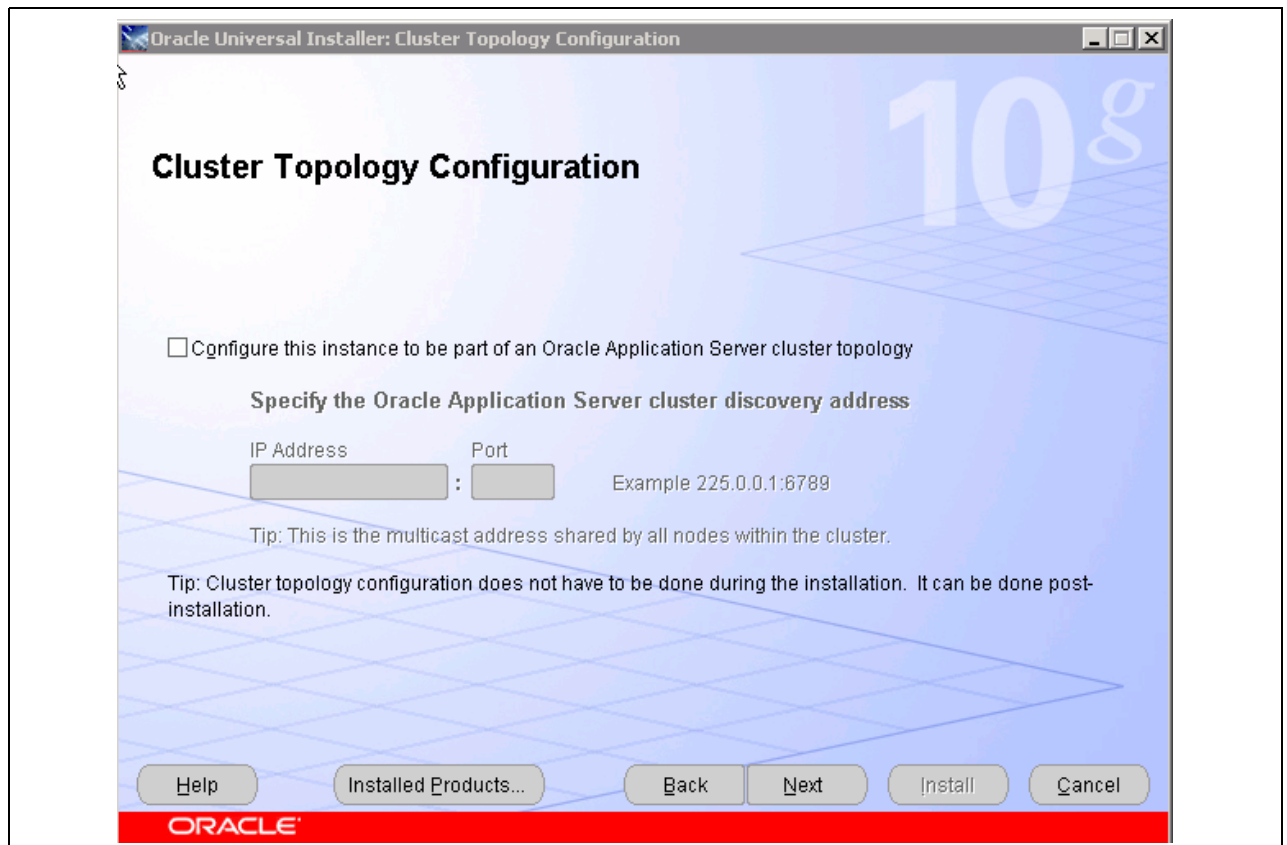
Note. Passwords must be a minimum of 8 characters in length with at least one numeric character.

Select option “Configure this as an Administration OC4J Instance”.



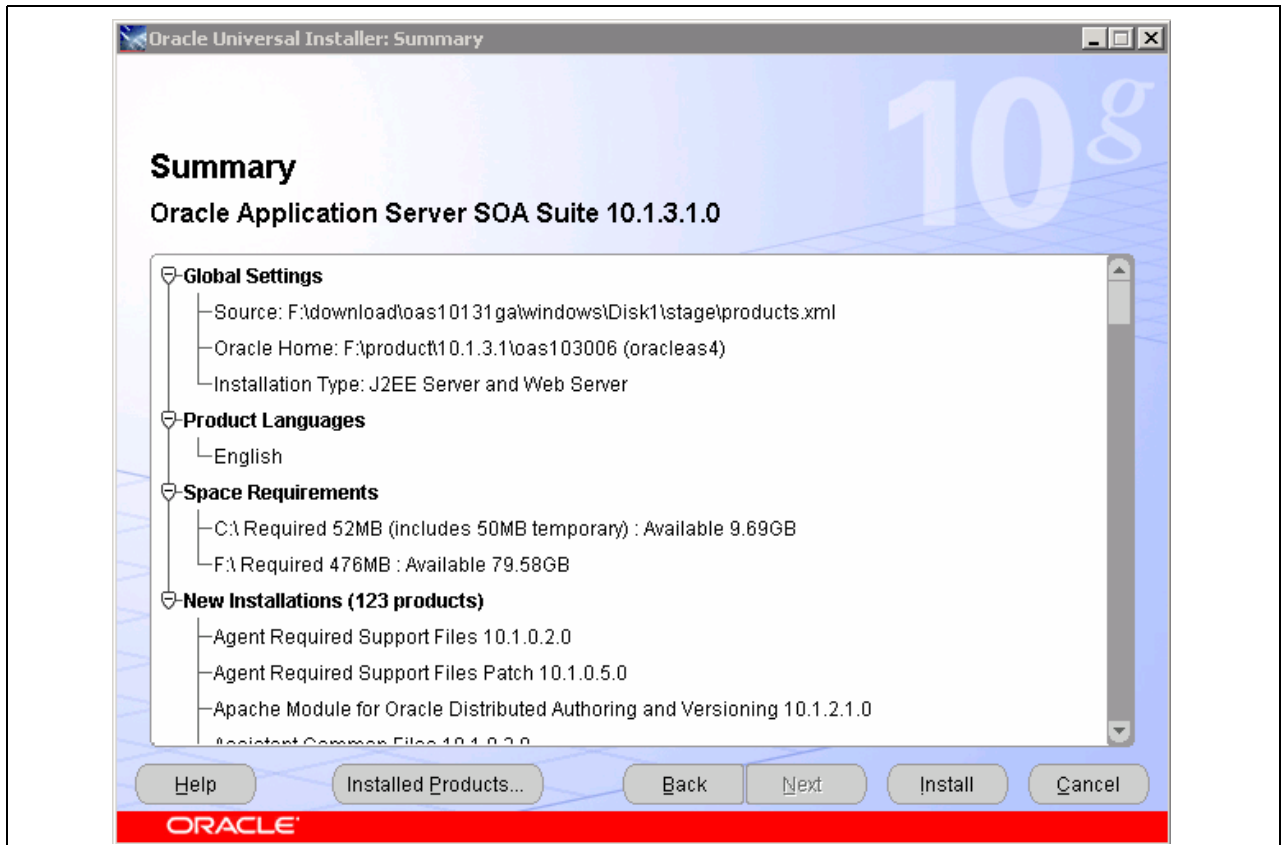
Administration Settings Window

11. Click Next.



Cluster Topology Configuration Window

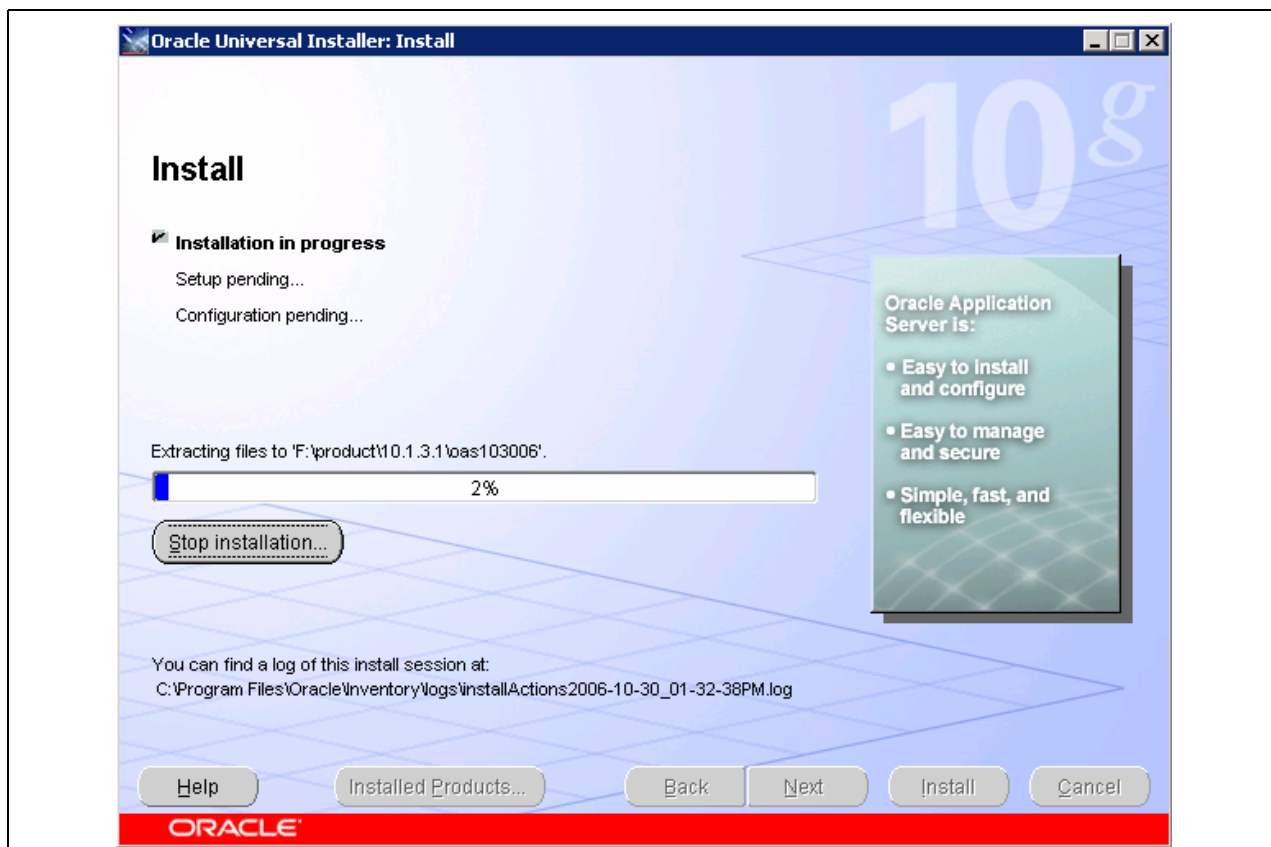
12. Click Next.



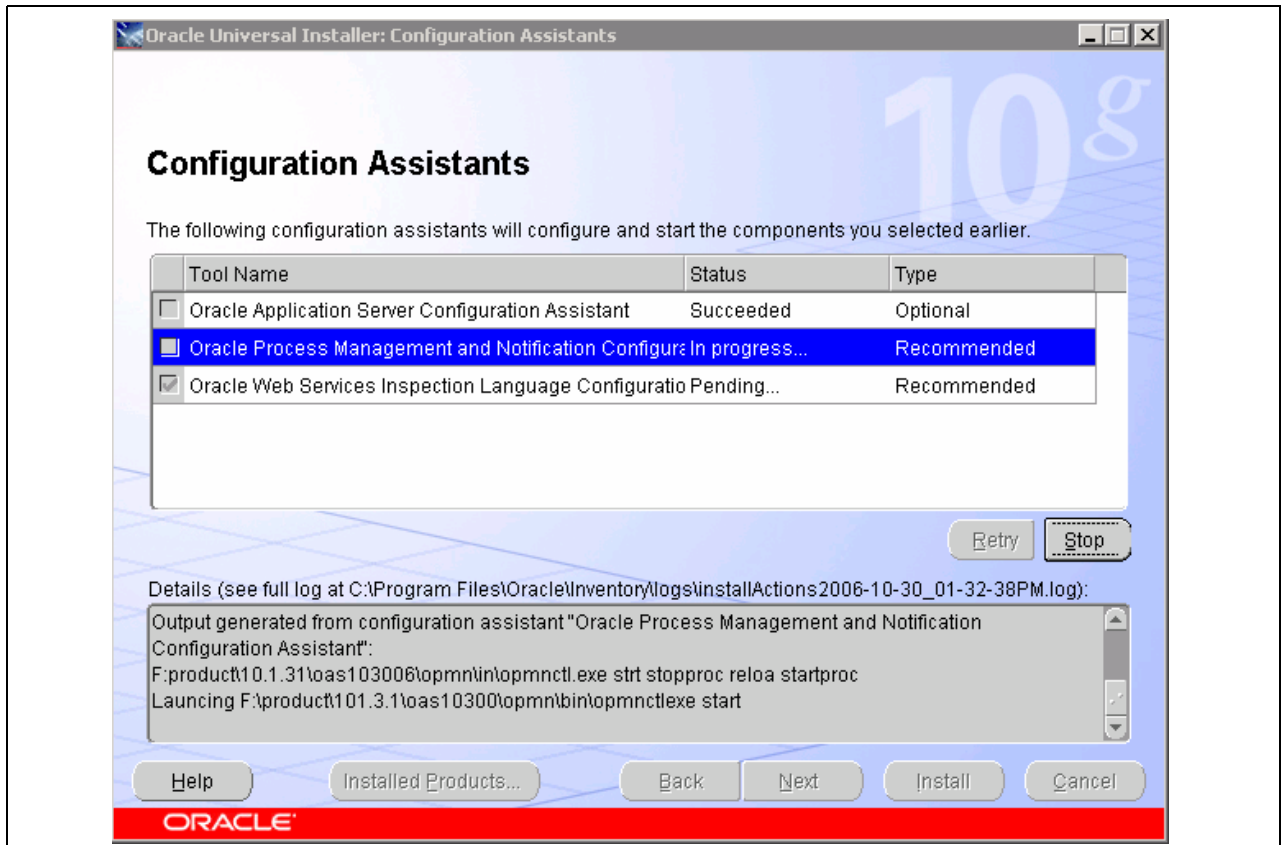
Window showing the summary of the installation options

13. Review the summary information. To make changes in the installation information, click Back. If you are ready to begin the installation, click Install.

Windows appear showing the progress of the installation and configuration.



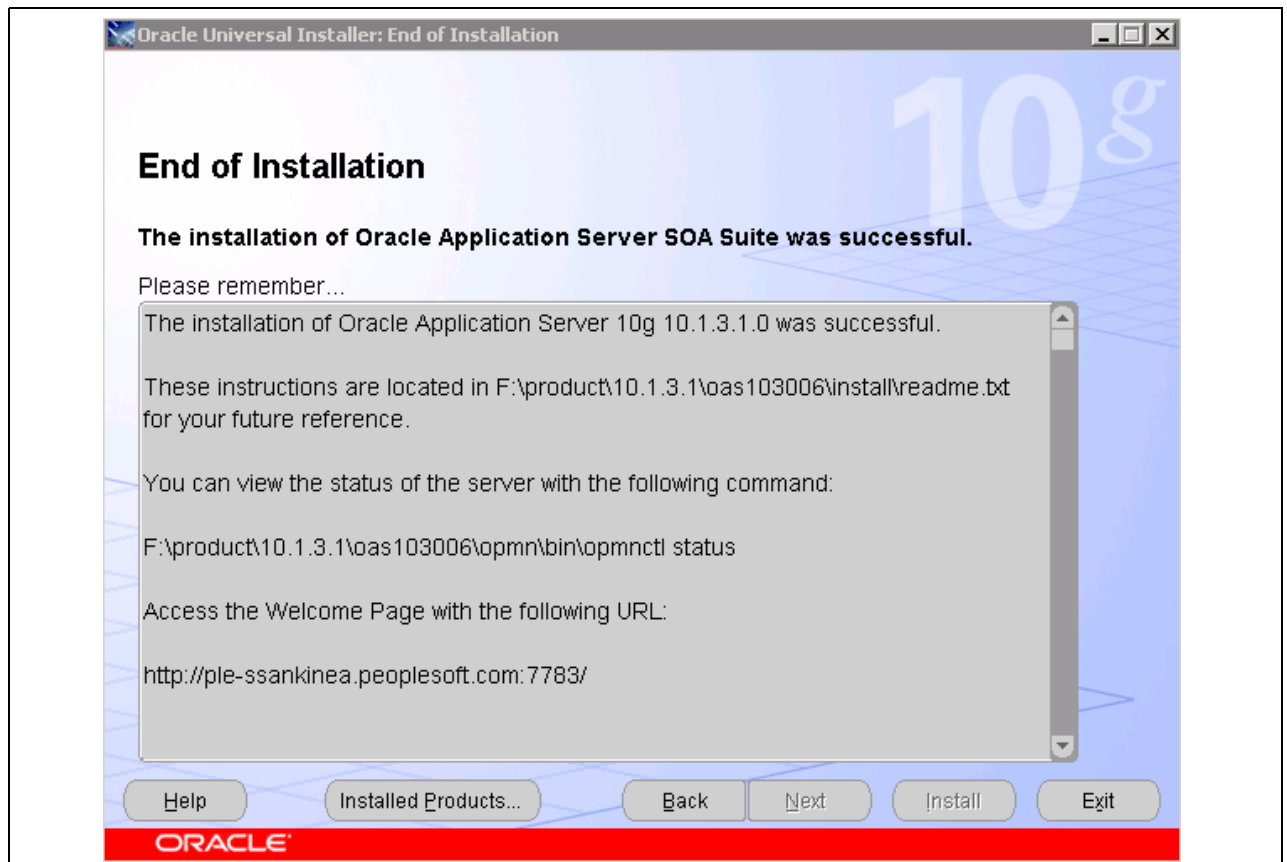
Window showing the progress of the installation



Configuration Assistants Window

14. When the installation is complete, the end of installation window appears.

Make note of the information displayed on the installation log file and login URL. Click Exit.

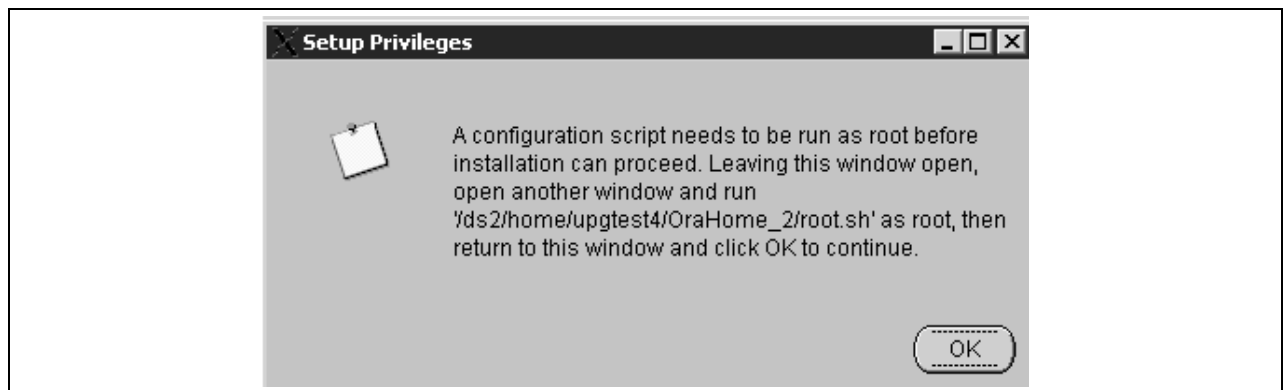


End of installation window

15. On UNIX, the following message box appears.

Open a new window and run the script `<OAS_HOME>/root.sh` as root.

In a separate window, run the script as root and click OK to complete the installation.



Setup Privileges for Oracle Application Server

Task 2-1-3: Installing Patches

Access <ftp://ftp.peoplesoft.com/outgoing/ptools/Oracle/OAS/10131> to retrieve any available patches. For each patch do the following:

Note. On some platforms (HP-Risc), the OPatch directory is missing from <OAS_HOME>. Please install the patch p2617419 before installing any other patch.

Note. There is a dependency on applying the patches. You need to apply patch p5669155 before applying any other patch. Follow the instructions in the readme.txt for applying patches.

1. Unzip the patch to a temp directory.
2. Set the environment variable ORACLE_HOME to point to the location of OAS 10.1.3.1 Installation.
3. Stop the OAS instance by running the following command:

```
# <OAS_HOME>\opmn\bin\opmnctl stopall
```

4. Set your current directory to the directory where the patch is placed.
5. Ensure that the directory (<OAS_HOME>\OPatch) containing the opatch script appears in your \$PATH.
6. Apply the patch by running the following command:

```
# opatch apply
```

7. Start the OAS instance by running the following command:

```
# <OAS_HOME>\opmn\bin\opmnctl startall
```

Note. Each patch has a README.txt that provided with detailed instructions for applying the patch.

Task 2-1-4: Uninstalling Oracle Application Server 10g Release 3 (10.1.3.1)

Before you can begin the uninstallation process do the following:

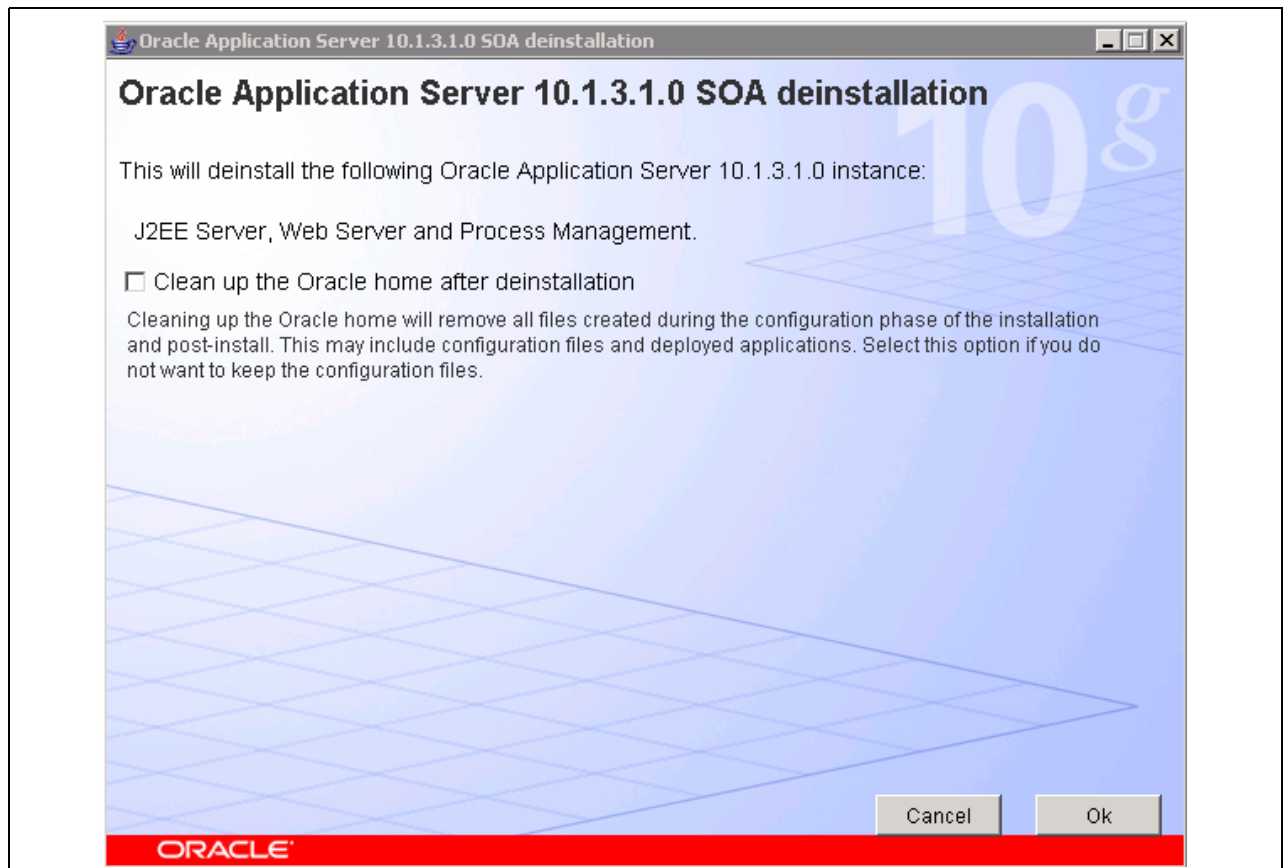
1. Stop all processes related with the instance you want to deinstall.
2. Go to <ORACLE_HOME>\opmn\bin and run the command `opmnctl stopall`.

To remove the OAS 10.1.3.1 installation:

1. Navigate to the OAS install directory.
2. Change directory to <OAS_HOME>\oui\jlib.
3. Run the command:

```
<OAS_HOME>\jdk\bin\java -jar deinstall.jar -c <OAS_HOME>\oui⇒  
\deinstall.properties
```

The following window appears.



OAS Application Server Deinstallation

4. Select "Clean up the Oracle home after deinstallation" option and click OK.



Selecting the option Clean up the Oracle home after deinstallation

5. After deinstallation is complete remove <ORACLE_HOME>.

Note. On Windows a reboot may be necessary before removing <OAS_HOME>.

Task 2-2: Installing BEA WebLogic Server

This section discusses:

- Understanding the WebLogic Installation
- Installing WebLogic
- Installing Patches
- Post Installation Steps
- Uninstalling WebLogic

Understanding the WebLogic Installation

PeopleSoft ships a licensed edition of BEA WebLogic Server 9.2. The Windows distribution of BEA WebLogic is located on the WebLogic CD-ROMs provided by PeopleSoft.

Note. The WebLogic server installation can be run from our CD or from a copy of the CD as long as the path to the CD is not a UNC and does not contain spaces.

Note. To familiarize yourself with the most current support information and information about any required WebLogic Service packs based on OS platform or PeopleTools versions, consult PeopleSoft Customer Connection or the Hardware and Software Requirements guide.

Note. The installation of WebLogic Server 9.2 requires 500 MB of free temporary space to extract the required files and run. By default, /tmp and %TEMP% are used on UNIX and Windows, respectively. In addition 500 MB of free space is required on the drive/device to which you opt to install WebLogic Server. If adequate space is not available, you will be prompted for alternate locations.

See Also

Enterprise PeopleTools 8.49 Hardware and Software Requirements

BEA's official installation instructions: <http://e-docs.bea.com/common/docs92/install/index.html>

PeopleSoft Customer Connection, Supported Platforms (Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms, PeopleSoft Enterprise)

Task 2-2-1: Installing WebLogic

Before beginning the installation, be sure to obtain any required patches for the installation from <ftp://ftp.peoplesoft.com/outgoing/ptools/weblogic/9.2/>

The following steps assume that you have the PeopleTools WebLogic CD for your platform in the D drive.

Note. BEA WebLogic Server 6.1, 8.1 and 9.2 can coexist on a single machine. If you choose to install this version of WebLogic in an existing BEA_HOME directory (for example, c:\bea), you must shut down all instances of WebLogic Server running in that BEA_HOME before performing this installation.

To install the WebLogic Server 9.2:

1. Insert the WebLogic Server 9.2 CD for your OS platform into an accessible CD-ROM drive and run the provided install command (install.cmd on Windows and ./install.sh on UNIX).

The install process will perform the base install, license install, and a JRE install if applicable. With prior releases of PeopleTools and WebLogic, each of these steps had to be run manually.

Platform	WebLogic Server CD
Windows Server 2003	CD1
AIX, HP-UX Intel Itanium	CD2
HP-UX PA-RISC 64-bit	CD3
Solaris	CD4
Red Hat and SuSE Linux Enterprise Server	CD5

Note. The installation script accepts command line arguments for silent installs. For usage, run `install -?` or `install -help`.

2. Specify the directory where you want to install WebLogic 9.2. This directory is known as BEA_HOME.

Note. When you install WebLogic Server, a JDK, and at least a partial JDK(JRE for AIX and HP-Itanium) is installed. PeopleSoft's JRE/JDK certification for WebLogic Server is based on extending BEA's JRE/JDK certification of WebLogic Server.

Task 2-2-2: Installing Patches

Beginning with WebLogic Server 9.2, BEA provides the Smart Update tool. This tool's functionality has been enhanced to allow users to install service packs and patches. Installing patches through Smart Update is recommended. Follow the steps listed below to use the Smart Update tool in the offline mode

1. In the WebLogic Server 9.2 CD, change the directory to "patches".
2. If there are any files in this directory, create a directory called "cache_dir" under BEA_HOME\utils\bsu
3. Copy all the contents of "patches" directory to "cache_dir" directory (this includes jar files and patch-catalog.xml).
4. Open a DOS window and change directory to BEA_HOME\utils\bsu\
5. Run the following command to apply the patch:

On Windows

```
bsu.cmd -prod_dir=<BEA_HOME\weblogic92> -patchlist=<patchfile1>=>
[,<patchfile2>,....] -verbose -install
```

On Unix:

```
./bsu.sh -prod_dir=<$BEA_HOME/weblogic92> -patchlist=<patchfile1>=>
[,<patchfile2>,<...>] -verbose -install
```

For example, if two patches `patch1.jar` and `patch2.jar` are available in `patches` folder, the following command should be used to install the patches on Windows assuming WLS 9.2 is installed under `c:\bea`.

```
bsu.cmd -prod_dir=c:\bea\weblogic92 -patchlist=patch1,patch2 -verbose -install
```

Note. You must access <ftp://ftp.peoplesoft.com/outgoing/ptools/weblogic/9.2/> to retrieve any latest patches.

Task 2-2-3: Post Installation Steps

As a result of the Energy Policy Act of 2005, Daylight Saving Time (DST) starts a little earlier and ends a little later, from the year 2007. In the United States and Canada, Daylight Saving Time starts on the second Sunday of March (March 11, 2007) and ends on the first Sunday of November (November 04, 2007). In order to follow the DST standards, all JDK versions that are used with WebLogic version 9.2 need to be upgraded. The following table lists the required JDK version for WebLogic Server 9.2.

Operating System	JDK version
Solaris	Sun JDK 1.5.0_06
Windows	Sun JDK 1.5.0_06
Linux BEA	BEA JRockit 1.5.0_06 R26.3
AIX IBM	IBM Java 5.0 SR1
HP-UX (PA-RISC & Itanium)	HP-UX JDK 5.0.3

While later JDK versions can also be applied, you must ensure that you at apply at least the JDK version listed in the above table.

Once a new JDK is installed, follow the steps listed below to update JAVA_HOME for WebLogic Server.

1. Edit PS_HOME\webserv\<domainname>\bin\setEnv.cmd(.sh).
2. Change the JAVA_HOME to point to the new JDK home and save the file.
3. Restart the webserver.

Task 2-2-4: Uninstalling WebLogic

To remove WebLogic 9.2 installation:

1. Change directory to BEA_HOME/weblogic92/uninstall.
2. To start the uninstaller in silent mode, run the following command:

On Windows

```
uninstall.cmd -mode=silent
```

On Unix

```
uninstall.sh -mode=silent
```

3. To start the uninstaller in GUI mode, run the following command

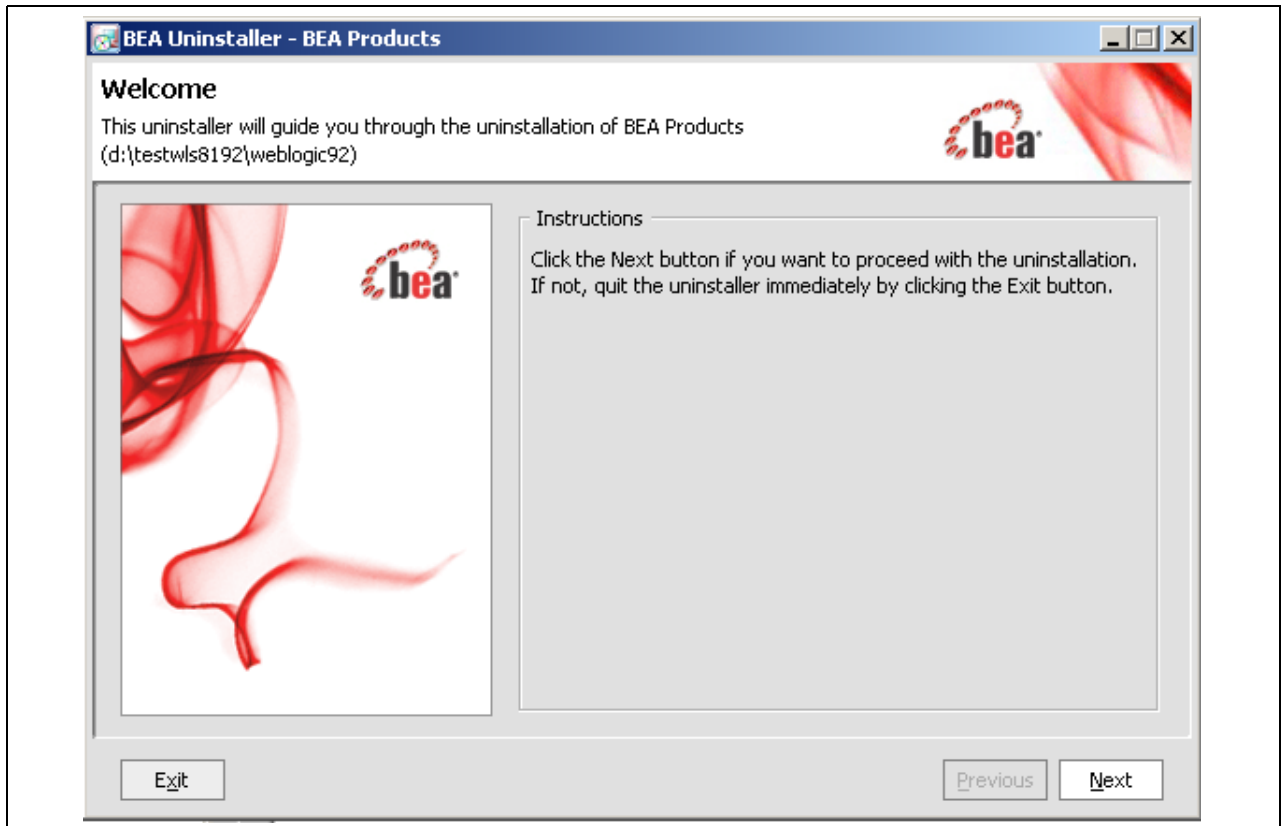
On Windows

```
uninstall.cmd
```

On Unix

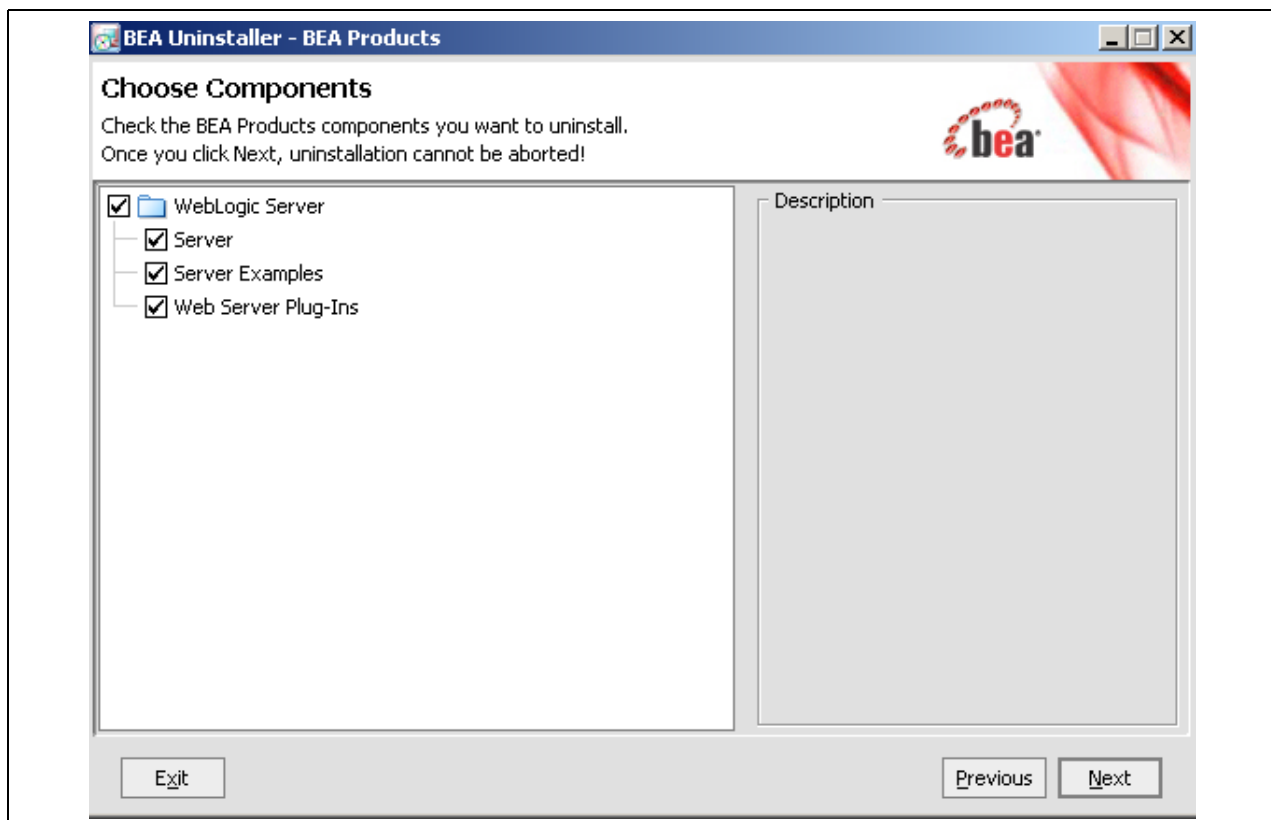
```
uninstall.sh
```

4. On the BEA uninstaller dialog box, select the BEA_HOME that you want to uninstall and click Next



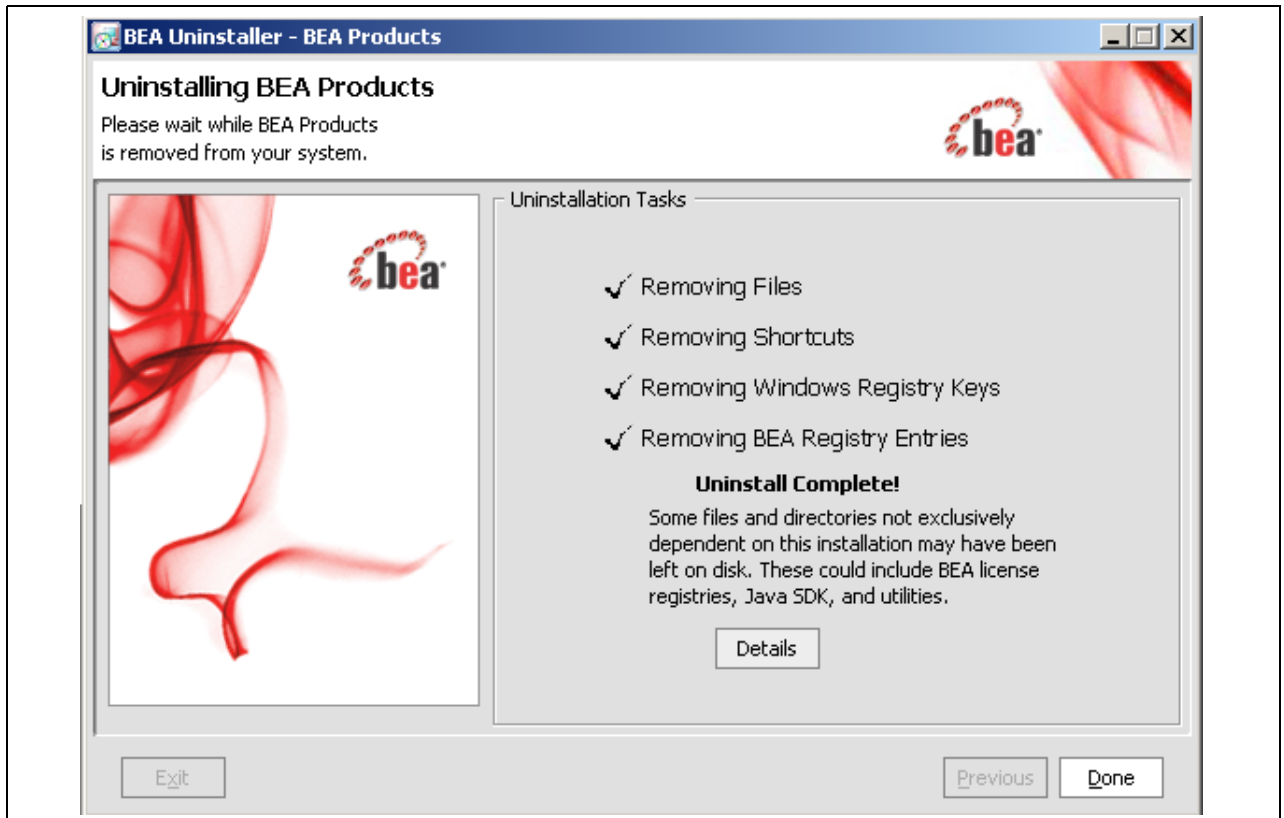
Welcome window

5. Select the components that you want to uninstall (by default all components are selected) and click Next.



Choose Components Window

6. After all the components are uninstalled, click "Done."



Uninstalling BEA Products window

7. Remove the BEA_HOME directory after the uninstallation.

Task 2-3: Installing WebSphere Application Server 6.1

This section discusses:

- WebSphere CD Distribution
- Prerequisites for WebSphere Application Server Network Deployment 6.1.0.3
- Installing WebSphere Application Server Network Deployment 6.1
- Installing WebSphere 6.1 in GUI Mode
- Installing WebSphere 6.1 in Silent Mode
- Logs and Troubleshooting
- Apply Interim Fixes
- Uninstall WebSphere ND 6.1

WebSphere CD Distribution

The WebSphere Application Server can be used as a web server for Enterprise PeopleTools for the following operating systems:

- Windows Server 2003
- Solaris
- HP-UX(PA-RISC 64-bit)
- HP-UX(Itanium)
- Red Hat and SuSE Linux Enterprise Server
- AIX

Enterprise PeopleTools 8.49 comes with 2 WebSphere CDs for each platform—WebSphere ND CD1 and CD2. The operating system is listed on each CD.

Here is an example for the AIX platform:

CD	Name	Contents
CD1	IBMWebSphere Application Server ND Version 6.1.0.3 for AIX	ND Application Server IBM Http Server 6.1 WebServer plug-ins GSKit Fixpacks
CD2	WebSphere Supplemental CD	Update Installer for WebSphere Tivoli Directory Server

We ship a gzipped tar file for HP-UX (Itanium) platform. To extract the WebSphere Application Server Network Deployment binaries, you require GZIP or unzip(zip) utilities.

1. Copy the WebSphere zipped binaries to the appropriate local directories.
Example: `cp /cdrom/HP64_WAS6103_849.tar.gz /opt/WASBinaries.`
2. Use the following commands to extract WebSphere binaries on your local drive:

```
gzip -d HP64_WAS6103_849.tar.gz
tar -xvf HP64_WAS6103_849.tar
```

Note. GNU tar utility is required to untar the file, otherwise a checksum error is thrown during the untar using the regular tar utility. The GNU tar utility can be obtained from <http://www.gnu.org/software/tar/tar.html>

Prerequisites for WebSphere Application Server Network Deployment 6.1.0.3

The full lists of prerequisites for WebSphere Application Server Network Deployment 6.1 (WebSphere ND6.1 hereafter) are available on the following website:

See <http://www-1.ibm.com/support/docview.wss?rs=180&uid=swg27007642>

If your operating system is not at the required patch level or if it has latest patches, a warning message will appear at the beginning of the installation. Review patches with an administrator. Apply the required patches (if necessary) and continue with the installation.

Note. On UNIX platform, the /var file system is used to store all the security logging information for the system; therefore it is critical that you maintain free space in /var for these operations.

Task 2-3-1: Installing WebSphere Application Server Network Deployment 6.1

People Tools 8.49 supports the Http Server embedded within WebSphere for both http and https. Use of an external proxy server is optional. Supported proxy servers are IBM Http Server, Sun Java System Web Server and Internet Information Server (Windows only).

Note. Both WebSphere Application Server Network Deployment and PeopleSoft Internet Application needs to be installed and deployed using the same user id. This restriction has been put forth in order to avoid any security and manage profile creation issues.

WebSphere ND6.1 can be installed either with root (Admin - Windows) or non-root user ids. However, non-root user is not capable of setting up SSL on WebSphere ND6.1. A root user id is required to configure SSL on WebSphere ND6.1 even though the install is done using non-root user id. It is important to remember that root user id is required only for configuration of SSL. For more information on limitations of non-root user id, click on the link given below:

See http://publib.boulder.ibm.com/infocenter/wasinfo/v6r1/index.jsp?topic=/com.ibm.websphere.nd.doc/info/ae/ae/rins_nonroot.html

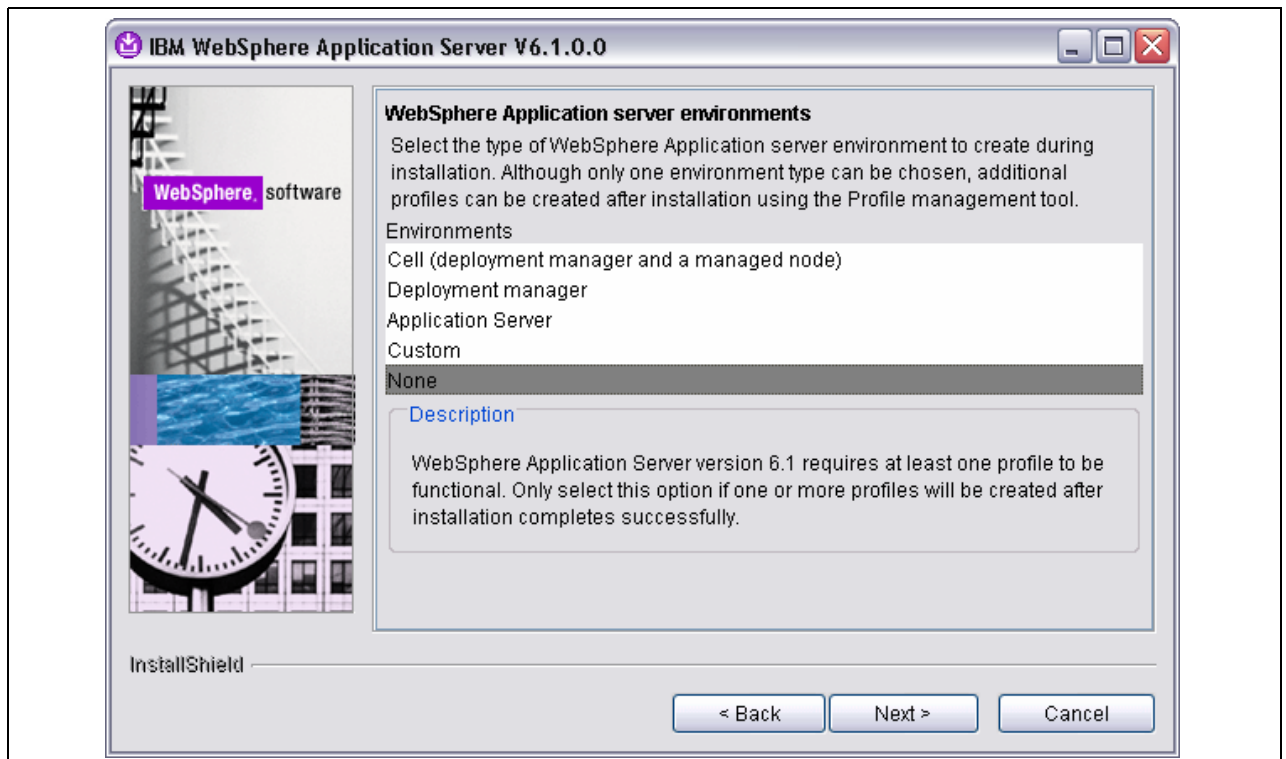
WebSphere ND6.1 install for PeopleSoft can be done either in GUI or Silent mode. The GUI mode is a more preferred way to install.

Task 2-3-2: Installing WebSphere 6.1 in GUI Mode

If installing on a UNIX system, setup the DISPLAY environment variable by executing the export DISPLAY command, for example:

```
export DISPLAY = pt-ibm07:0.0
```

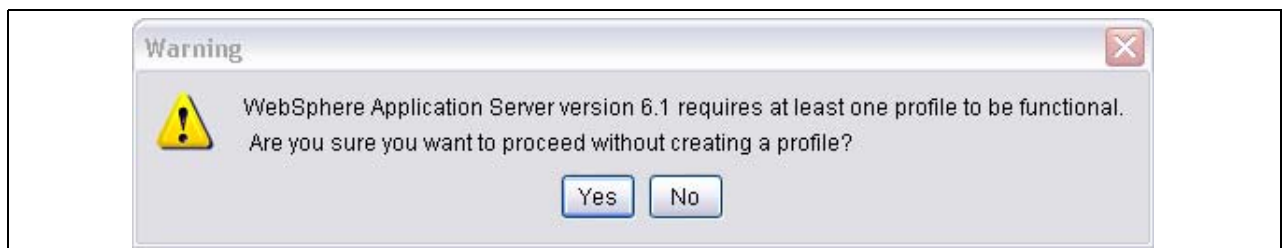
1. Open a command prompt and execute the command - "installWAS. [bat/sh]", which will start the installation of WebSphere ND6.1.
2. This will invoke the default GUI install window. If a window does not appear on a UNIX system, check that the DISPLAY environment variable is set properly. On this window, accept the Software license agreement and Click Next.
3. The next window will ask you for Install Location, followed by profile creation & server environments.
4. Select 'NONE' as the WebSphere Application server environment option. PeopleSoft Internet Application install will create a customized cell profile for you.



WebSphere Application Server environments

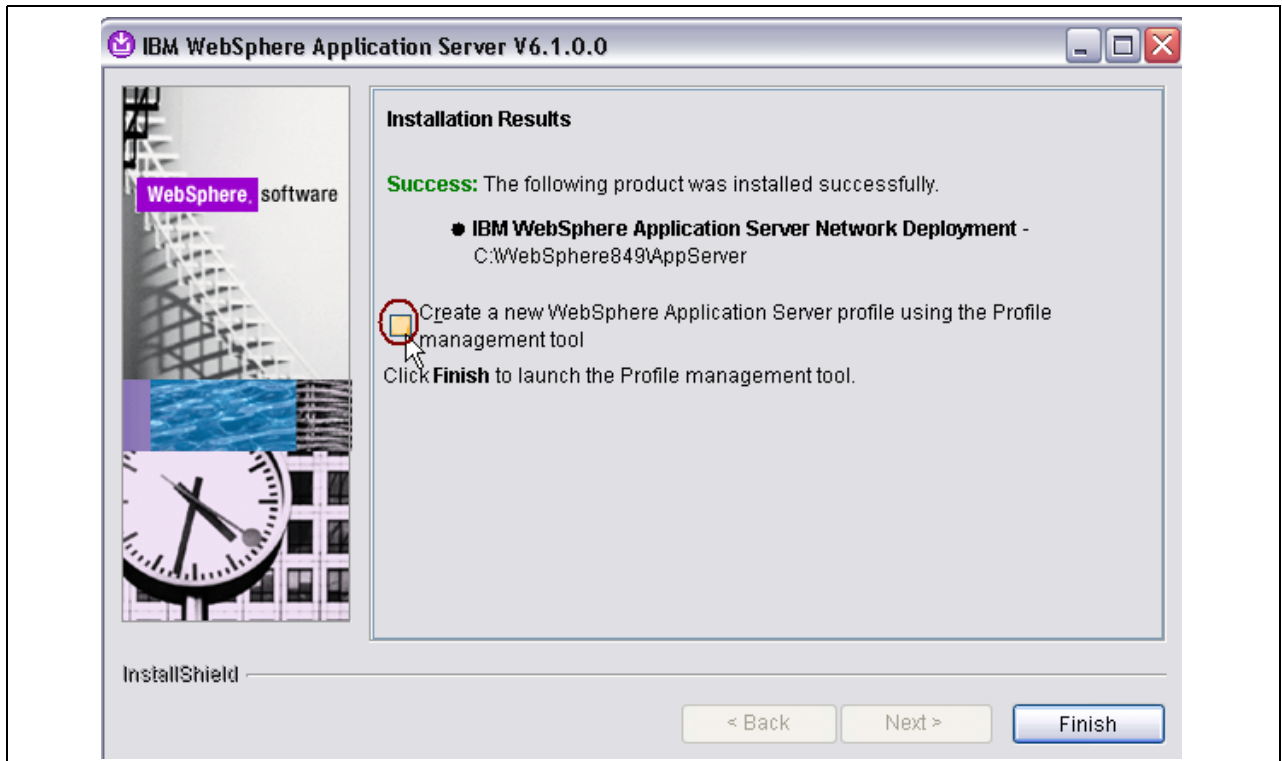
Note. On Windows platform, selecting anything other than NONE as the WebSphere Application Server environment Profile may cause the install to not complete successfully. The other selections, besides NONE, create a Windows-OS lock on the profile, restricting PeopleSoft related interim fixes to not install properly.

5. A warning message will appear to check whether you want to proceed without creating a profile, Click 'Yes' to continue.



Warning Message

6. Click Next, to proceed with the WebSphere ND 6.1 installation.
7. After the installation has been completed, an 'Installation Results' window will appear. On this window, Uncheck the Create a new WebSphere Server profile option, as shown below, and then Click Finish.



Installation Results

You have completed the installation of the WebSphere ND v6.1.0.3 using the GUI mode.

Task 2-3-3: Installing WebSphere 6.1 in Silent Mode

To perform the silent install:

1. Navigate to folder 'WAS' on the CD-ROM drive; the sample option response file, named wasSilentFile.txt is provided in this folder.
2. Edit the following parameters in wasSilentFile.txt:
 - a. WebSphere ND6.1 Install Location
Search for 'installLocation' in wasSilentFile.txt and modify the location. Example:
`-OPT installLocation="/opt/WebSphere6103/AppServer"`
 - b. Set Profile to NONE
Search for 'profileType' in wasSilentFile.txt and modify the profile type to NONE.
`-OPT profileType="NONE"`
 - c. Accept License Agreement.
Search for 'LicenseAcceptance' in wasSilentFile.txt and set the following option to "true":
`-OPT silentInstallLicenseAcceptance="true"`
 - d. Disable AdminSecurity.
Search for 'AdminSecurity' in wasSilentFile.txt and set the following option to "false":
`-OPT PROF_enableAdminSecurity="false"`

3. Issue the following command to use your custom response file and install WebSphere ND6.1.

On Windows

```
Install.exe -options wasSilentFile.txt -silent -log # ! fully_qualified_log_⇒  
file_name @ALL
```

On UNIX

```
install -options. /wasSilentFile.txt -silent -silent -log # !fully_⇒  
qualified_log_file_name @ALL
```

You have completed the installation of the WebSphere ND v6.1.0.3 using the Silent mode.

Task 2-3-4: Logs and Troubleshooting

After the installation is complete the following log file is generated.

<WebSphere_Home>/logs/install/log.txt

If the error happens early in the installation, look for the log.txt file in the system temporary area (Example:- C:\temp). The installation program copies the log from the temporary area to the logs directory at the end of the installation.

During installation, a single entry in the *<WebSphere_Home>/logs/install/log.txt* file points to the temporary log file, either *%TEMP%\log.txt* on Windows platforms, or */tmp/log.txt* on platforms such as AIX or Linux.

Task 2-3-5: Apply Interim Fixes

Refer customer connection link <ftp://ftp.peoplesoft.com/outgoing/PTools/websphere/6103> to check whether any interim fixes are needed. If they are present, you must install them using the readme file.

Task 2-3-6: Uninstall WebSphere ND 6.1

To uninstall WebSphere ND 6.1, open a command prompt and change the directory to WebSphere ND _uninstall:

```
cd <install_directory>\_uninst
```

and then execute the uninstall command. WebSphere uninstall creates the *<WebSphere_Home>/logs/uninstall/log.txt* file, at the time of execution.

CHAPTER 3

Installing Additional Components

This chapter discusses:

- Installing Tuxedo on Windows
- Installing Micro Focus Net Express for Windows

See Also

“Clustering and High Availability for PeopleSoft 8.4,” PeopleSoft Customer Connection (Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Red Paper Library)

“Required Operating System, RDBMS, and Additional Component Patches Required for Installation,” PeopleSoft Customer Connection, (Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms, PeopleSoft Enterprise. Select your database platform or release number.)

“Installing and Configuring Software for Crystal Reports”

Task 3-1: Installing Tuxedo on Windows

This section discusses:

- Understanding Tuxedo
- Prerequisites
- Uninstalling Tuxedo from Windows (Optional)
- Designating the Application Server Administrator
- Installing Tuxedo on Windows
- Checking the Service Account
- Setting Up the Tuxedo Services
- Verifying the Server Installation
- Ensuring that Tuxedo Coexists with Earlier Versions

Understanding Tuxedo

The PeopleSoft application server uses BEA's middleware product, Tuxedo, to perform transaction management, messaging, and administration. This task guides you through the installation of Tuxedo on your server. It is essential that you install PeopleSoft Edition - BEA Tuxedo version 9.1, which you receive with your PeopleSoft shipment as part of the CD-ROM Library. You need to install Tuxedo before you go any further in setting up your application server and your PeopleSoft Pure Internet Architecture. After you perform the installation described here, you will configure the application server environment to incorporate Tuxedo with the PeopleSoft components.

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*.

Note. Only one instance of Tuxedo 9.1 can be installed on a Windows machine at any given time, due to system-wide registry settings.

The installation process uses a single installation script, `pstuxinstall.exe`, to automatically install Tuxedo.

Note. It is critical that you use the PeopleSoft Edition - BEA/Tuxedo 9.1 delivered with PeopleSoft; the version of Tuxedo that you receive with your PeopleSoft shipment is the only version of Tuxedo that PeopleSoft supports with this version of PeopleTools. You cannot use any other version of Tuxedo with PeopleSoft applications. For example, if you obtain BEA/Tuxedo 9.1 directly from BEA, it may not support all functions required due to patch-level differences.

Note. All customers receive the 128-bit version of the CD-ROM, which allows users to enable 128-bit encryption.

The PeopleSoft Edition - BEA/Tuxedo CD-ROM installs serial and license information transparently to the user; there are no numbers to obtain. If you encounter a serial or licensing error on installation, you probably have an old version of Tuxedo installed.

PeopleSoft Edition - BEA/Tuxedo CD-ROM licenses users to use Tuxedo's runtime/administration environment for the purposes of installing, monitoring, and tuning their Tuxedo-based PeopleSoft application servers. Users *are not* licensed to directly use the Tuxedo development environment. Users will be able to use any higher level API or tools that PeopleTools developers build with Tuxedo and will be able to run applications that are processed with our Tuxedo enhanced tools. If you wish to extend the PeopleSoft application's functionality by directly using the Tuxedo development API, you need to acquire a full-use license for Tuxedo from BEA Systems.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Internet Technology

Prerequisites

Before you begin to install Tuxedo, make sure that you have the following resources in place:

- PeopleSoft Edition - BEA/Tuxedo System 9.1 Installation for Windows and UNIX CD-ROM
- TCP/IP connectivity (required for PeopleSoft 8.4x) between the client machine and the application server
- Approximately 235 MB of free disk space on the application server
- A CD-ROM drive or access—locally or through the network—for the machine on which you plan to install Tuxedo

Task 3-1-1: Uninstalling Tuxedo from Windows (Optional)

You may already have Tuxedo 8.1 installed on your system from an earlier version of PeopleTools. If you are completely upgrading to PeopleTools 8.49 from an earlier version of PeopleTools, then, you may uninstall the existing version and patches.

Note. It is not mandatory to uninstall the existing version of PeopleTools as Tuxedo 8.1 and Tuxedo 9.1 can coexist on the same machine.

Note. If you wish to use two versions of PeopleTools that depend on different versions of Tuxedo, you should read the section “Ensuring that Tuxedo Coexists with Earlier Versions” before continuing.

You may have to uninstall Tuxedo for these reasons:

- You are having problems starting Tuxedo and decide to reinstall.
- You no longer need Tuxedo on a machine.

To uninstall Tuxedo from Windows:

1. Using PSADMIN, shut down any application server and process scheduler domains that may be running on the machine.
2. Stop the processes for the Tuxedo Monitor and the Tuxedo Administrative Web Server (wlisten and tuxwsvr), if applicable.
 - a. Right-click on the task bar and select Task Manager.
 - b. Highlight wlisten, and click the End Task button.
 - c. Highlight tuxwsvr and click the End Task button.
 - d. Exit Task Manager.
3. Stop and set the TListen 8.1 service to manual, if applicable.
 - a. Select Start, Settings, Control Panel. Double-click Administrative Tools, and double-click the Services icon.
 - b. Select TListen 8.1 and click the Stop button.
 - c. Choose the Startup Type and set to Manual.
4. Stop and set the BEA ProcMGR V8.1 service to manual.
 - a. Select Start, Settings, Control Panel. Double-click Administrative Tools, and double-click the Services icon.
 - b. Select BEA ProcMGR V8.1 and click the Stop button.
 - c. Choose the Startup Type and set to Manual.
5. Reboot your machine.
6. Uninstall Tuxedo in one of the following ways:
 - Using the Tuxedo 8.1 installation CD provided by PeopleSoft, open a Command Window, navigate to the root of the CD, and enter `pstuxinstall rmall`. This will remove Tuxedo 8.1 plus any delivered Tuxedo patches from your system.
 - Using the Add/Remove Programs dialog, in sequence remove: Tuxedo 8.1 RP and then Tuxedo 8.1.
7. Go to the Control Panel, double-click on the System icon, and then perform the following:

- a. Make sure <TUXDIR>\bin is deleted from PATH.
 - b. Delete the environment variable TUXDIR.
 - c. Make sure you click on Apply and OK to save your changes.
8. Using Explorer, delete the Tuxedo home directory, such as c:\bea\tuxedo8.1.

If you are unable to delete any files, reboot your machine and retry.

Task 3-1-2: Designating the Application Server Administrator

First you need to designate an existing user—or create a new user such as TUXADM or some other account—to be the Application Server Administrator.

Note. The designated user must be a local Windows administrator and must have full system privileges. The PeopleSoft 8.49 Tuxedo install program creates a new service for Windows—called BEA ProcMGR V9.1—for which you need administrator privileges. This service was developed to port BEA/Tuxedo from UNIX to Windows. Administrator rights are required since system registry settings are updated. Once this new service is created, you must reboot to start it.

Note. The Application Server Administrator, not the Windows Administrator, will install Tuxedo.

To designate the Application Server Administrator:

1. To add the user, add the user ID by choosing Start, Settings, Control Panel, Administrative Tools, Computer Management, Local Users and Groups.

Keep in mind that you can also use an existing account if you don't care to create a new one. You can set this to the system account or an account that is a domain administrator (if there is a need to access files on the domain).
2. Expand Local Users and Groups.
3. If the user ID does not yet exist, highlight the Users folder, and select Action, New User.
4. On the New User dialog box, specify the information for the new account.
Make sure to deselect the User must change password at next logon check box.
5. Expand the Groups folder.
6. Right-click the Administrators group, and select All Tasks, Add to Group, Add.
7. Click Locations to select the local machine or the network domain in which you created the new user.
8. Enter the new user name you created in the object names box.
9. Click OK, and click Apply and OK again to accept the changes.

Task 3-1-3: Installing Tuxedo on Windows

Here is how to properly install the Tuxedo component of your application server.

Note. Installation from UNC path is not supported. If you are installing PeopleTools 8.49 Tuxedo from a network you need to map to a drive. Example: Z:\psuser\cd1 and then double-click pstuxinstall.exe to begin installation.

To install Tuxedo on Windows:

1. Insert the PeopleSoft Tuxedo CD-ROM labeled “Tuxedo 9.1 CD-1” into the CD-ROM drive.
Using Explorer, navigate to the root directory on the CD:

D:\

(This assumes that your CD-ROM drive is your D drive.)
2. Double-click pstuxinstall.exe to begin the installation process.
3. You are prompted for the BEA Home directory. If you have existing BEA products on the machine, you may supply an already designated BEA Home location or accept the default of c:\bea.
4. You are prompted for the Tuxedo installation directory. This can be a subdirectory of the BEA Home directory or a directory of your choice.
5. You are prompted for the TListen port. The TListen service is not used by PeopleSoft application servers so you can accept the default unless you intend to use the Tuxedo Web Monitor. Unless you use the Tuxedo Web Monitor, you should disable the TListen service following the installation.

Note. If you intend to maintain multiple versions of Tuxedo on the same physical machine, it is wise to choose a port other than the default 3050 because the default port may clash with an existing TListen entry for an earlier version of Tuxedo.

See Ensuring that Tuxedo Coexists with Earlier Versions.

6. You are prompted for the TListen password. Again, unless you plan to use the Tuxedo Web Monitor, this service will be disabled following installation so you may go ahead and accept the default.

Note. If you intend to use the Tuxedo Web monitor for domain administration, PeopleSoft recommends that the TListen password be hard to guess and securely protected, since the Web monitor can start and stop production application server domains.

7. If you are satisfied with your selections confirm this when requested. This is your final opportunity to choose your Tuxedo installation location.
8. Tuxedo 9.1 plus patch will now be installed to your system. When the installation has completed you are notified by the command line installer.
9. Reboot your machine to complete the installation.

Task 3-1-4: Checking the Service Account

Now you need to ensure that the Windows services are properly configured. PeopleSoft recommends installing the application server binaries locally on your C drive, for best performance, and using the Local System account radio button (see below) to start the BEA ProcMGR V9.1 service, with these exceptions:

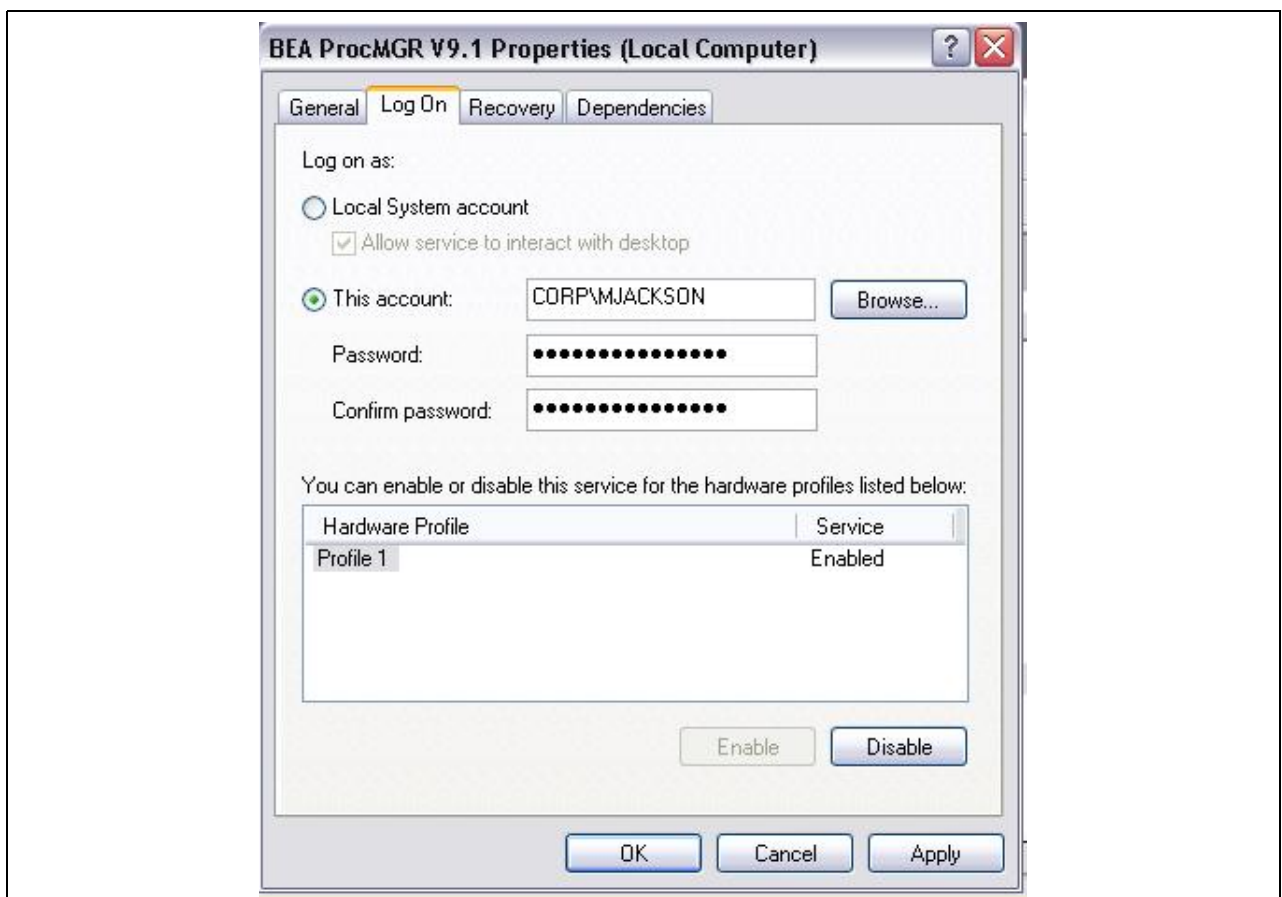
- If you plan to install the PeopleSoft application server binaries (as in, psappsrv.exe and so on) on a remote file server, you must select the This Account radio button. If you intend to use this Windows service to start Process Scheduler, you must *always* select the This Account radio button. Enter the name of your Domain/Windows username—not the machine name—and your password. Then click OK.
- If the PeopleSoft application server binaries are *local*, that is, they exist on your local hard drive, you can use either the Local System account or This Account radio button.

Note. When using Tuxedo with Process Scheduler, you must use the Windows username that starts the Process Scheduler server agent. This is necessary because the installation of the PeopleSoft ODBC driver sets up the registry settings to be accessible only by this username. If you do not use the correct Windows username, processes that require the ODBC registry information (such as Crystal Reports) will fail.

Task 3-1-5: Setting Up the Tuxedo Services

To set up the Tuxedo services:

1. Log on again as the Application Server Administrator, TUXADM, or a designated user ID.
2. Open the Control Panel and double-click Administrative Tools.
3. Select Computer Management and expand Services and Applications.
4. Select Services and locate the service labeled *BEA ProcMGR V9.1*.
Double-click BEA ProcMGR V9.1 to open the properties dialog box.
5. On the General tab, if the Stop button is enabled, click on it to stop the current BEA ProcMGR V9.1 process.
6. Select Log On.



BEA ProgMGR V9.1 Properties Dialog Box: Log on Tab

Note. The option used—Local System account or This Account—must be consistent with your ODBC catalog definition, due to registry operations. For example, if you use the Local System Account option, you must also catalog your ODBC data source using System DSN.

7. Choose either Local System account or This Account.

Note. When you configure your application server domain, the user ID designated to be the Application Server Administrator must have read and write permissions to the PeopleSoft file directory and read permission to the %TUXDIR% directory, such as c:\bea\tuxedo9.1.

See “Configuring the Application Server on Windows.”

Note. If you are running on Windows and are configuring a search index that resides on a mapped network drive, you must ensure that the User ID of the BEA ProcMGR service has access to network drives accessed by the search engine. The search engine stores the search indexes at <PS_HOME>/data/search. However, this path can be changed in the application or the Process Scheduler's configuration. If this path is changed in these configurations and it points to a network drive, please ensure that the user ID that starts the BEA ProcMGR V9.1 service has access to these network drives. The application server and the process scheduler are started by the BEA ProcMGR V9.1 service and therefore inherit the same permissions as the BEA ProcMGR V9.1 service.

8. Select General.

Make sure that Startup Type is set to *Automatic*.



BEA ProgMGR V9.1 Properties Dialog Box: General Tab

9. Select Start.

A message in the Services dialog box will indicate the Started status. Close the dialog box to return to the Control Panel.

10. As mentioned, unless you intend to use the Tuxedo Web Monitor, you should disable the TListen 9.1 service.

Task 3-1-6: Verifying the Server Installation

At this point, you should verify that the server installation was successful.

To verify the server installation:

1. Go to the udataobj directory under <TUXDIR>.
2. Ensure that the lic.txt file exists.
3. Verify that the file patchlev exists.

If neither of these files exist:

- Verify that no error messages were displayed during installation of Tuxedo 9.1.
- Verify that you have sufficient disk space on the directory or file system used for <TUXDIR>.
- Reinstall BEA/Tuxedo 9.1.

Task 3-1-7: Ensuring that Tuxedo Coexists with Earlier Versions

This section discusses:

- Understanding the Use of Multiple Tuxedo Versions
- Checking Your Environment Variables
- Changing the TListen Port

Understanding the Use of Multiple Tuxedo Versions

PeopleTools 8.44 to 8.48 use Tuxedo 8.1. Earlier versions of PeopleTools rely on earlier versions of Tuxedo—for example, PeopleTools 8.41 uses Tuxedo 6.5. If you are installing only PeopleTools 8.49, you can safely skip this section. If you need to run application servers on PeopleTools 8.49 and earlier PeopleTools versions on the same machine, read this section to learn about coexistence issues. Although Tuxedo 9.1 coexists with earlier Tuxedo versions on the same machine, you may need to take a number of manual steps to ensure that these products share the same environment gracefully.

Checking Your Environment Variables

Installing Tuxedo changes your TUXDIR and PATH environment variables. Although you do not need to change these environment variables to successfully run PeopleTools 8.49 with Tuxedo 9.1, earlier versions of PeopleTools rely on these environment variables being set.

To change your environment variables:

1. Set your <TUXDIR> environment variable to reflect the installation directory of your earlier Tuxedo release. For example, Tuxedo 8.1 may be installed to c:\tux8.1. This means that TUXDIR=C:\tux8.1 is the correct setting. Tuxedo 6.5 may be installed to c:\tux65. This means that TUXDIR=C:\tux65 is the correct setting.
2. Your <PATH> environment variable must contain <TUXDIR>\bin for the earlier Tuxedo version before any entries for Tuxedo 9.1 <TUXDIR>\bin. For example the setting PATH=c:\winnt;c:\bea\tuxedo9.1\bin;c:\tux65\bin will cause your pre-8.49 application server domains to no longer work. You would need to change this to PATH=c:\winnt;c:\bea\tuxedo8.1\bin;c:\bea\tuxedo9.1\bin;c:\tux65\bin; to work with PeopleTools

8.44 to 8.48 application servers. And change PATH= c:\winnt; c:\tux65\bin; c:\bea\tuxedo8.1\bin; c:\bea\tuxedo9.1\bin to work with pre-8.44 application server

Note. PeopleTools 8.44 and later do not use environment variables to discover the installation location of Tuxedo 8.1 and Tuxedo 9.1. The PSADMIN tool retrieves these values from the Windows registry.

Changing the TListen Port

Installing Tuxedo 9.1 and earlier creates a new service known as TListen. In most cases, you can disable this service as it is not required to run PeopleTools application server domains. However, if you intend to use the Tuxedo Web Monitor you may wish to ensure that there is no port clash with earlier versions. This port is determined at installation and should be changed to a port other than the default 3050 if you intend on using the TListen service for Tuxedo 9.1 and earlier Tuxedo version(s) concurrently.

Task 3-2: Installing Micro Focus Net Express for Windows

This section discusses:

- Understanding the Net Express Installation
- Prerequisites
- Installing Net Express

Understanding the Net Express Installation

Micro Focus® Net Express™ 4.0 is supplied on two CDs. CD-1 contains the Net Express and Net Express Studio software and documentation, and Microsoft Internet Explorer. CD-2 contains the Microsoft Win32 Software Development Kit for Microsoft Windows.

In the following sections, *d:* refers to the drive-ID of your CD-ROM drive, and the Run dialog is the dialog box you see if you select the *Run...* option on the Windows Start menu.

Prerequisites

To install and use Net Express you must have Microsoft Internet Explorer 5.0 or later installed. You can install Internet Explorer 6.0 from the Net Express 4.0 CD home page.

Task 3-2-1: Installing Net Express

To install Net Express 4.0:

1. Insert CD-1 into your CD-ROM drive. After a few moments, you should see the Net Express 4.0 CD home page in your browser.
2. If the home page does not appear, enter the following command in the Run dialog box:

d:\setup.exe
3. Select Installing on the contents list on the Net Express home page, then select the link Click here to install or upgrade Net Express 4.0. The Startup process begins.

4. Follow the instructions displayed. For information on which of the options to choose for PeopleSoft software, see the instructions for installing Server Express on UNIX.

If you encounter any problems during or after the installation, refer to the Installation Notes on the home page.

CHAPTER 4

Using the PeopleSoft Installer

This chapter discusses:

- Understanding the PeopleSoft Installer
- Prerequisites
- Using E-Delivery for the PeopleSoft Installation
- Running the PeopleSoft Installer with a Single CD-ROM Drive (Optional)
- Running the PeopleSoft Installer Without Swapping CDs (Optional)
- Running the PeopleSoft Installer
- Installing the Application CD
- Loading the Multilanguage CD

Note. You must install the necessary web server products and any additional component software as described in the previous chapters before you run the PeopleSoft Installer.

Understanding the PeopleSoft Installer

This section discusses:

- Defining the PeopleSoft Installer
- Understanding PeopleSoft Servers
- Defining Supported Server Combinations
- License Codes

Defining the PeopleSoft Installer

The PeopleSoft Installer is a Java-based tool that delivers software to your servers.

The PeopleSoft Installer enables you to transfer files directly to various PeopleSoft servers—including application servers, batch servers, web servers, and database servers—without first copying all files to a file server.

You run the PeopleSoft installer to install the necessary products on the target machines. Which files are installed depends on which products you are licensed for, the operating system on the target machine, the database platform, and the selected server option. The PeopleSoft Installer installs files directly to Windows machines. PeopleTools and PeopleSoft Applications use the same PeopleSoft Install template. This chapter discusses the installation of PeopleTools, followed by the installation of applications CDs and the Multilanguage CD.

To obtain the software from an FTP site, see “Using E-Delivery for the PeopleSoft Installation.”

Note. During the installation you select the servers you want to install. Keep in mind that you can install multiple servers at the same time, but they will all be installed on the same machine. If you want to install servers on separate machines, you need to run the PeopleSoft installer on each server machine.

Note. If you need to set up the file server on a separate Windows machine, you should install PeopleTools, any applications CDs, and the Multilanguage CD, as discussed in the next chapter.

See “Setting Up the File Server on Windows.”

All licensed components of the PeopleSoft Architecture must be installed on each server. Ideally, you should install the Windows file server component first.

You can install multiple logical servers to the same machine. For example, you can have the application server and the batch server on the same machine. But, if you want to install different servers to different machines, you have to run the PeopleSoft Installer once for each server.

Understanding PeopleSoft Servers

You can install the whole range of PeopleSoft servers (file server, application server, and so on) with the PeopleSoft Installer. You can install PeopleSoft server software separately or together. Keep in mind which PeopleTools functionality resides in each server:

- *File Server:* All Client executables (PSIDE...), Nvision, Upgrade Assistant or Change Assistant, files and directories necessary to perform upgrade, and Client SQR.
- *Application Server:* PSADMIN, COBOL for remote call, Verity.
- *Web Server:* Windows PeopleSoft Pure Internet Architecture (PIA) install, UNIX web files and shell scripts, Portal Search data files, Verity, and Enterprise Resource Planning Connectors.
- *Process Scheduler Server:* PSADMIN, COBOL, SQR, Verity.
- *Database Server:* Scripts and data directories, files necessary to run Data Mover.

Defining Supported Server Combinations

The following table lists the supported operating systems for the various PeopleSoft servers for your database platform.

See *Enterprise PeopleTools 8.49 Hardware and Software Requirements*.

Supported operating systems for database servers	Supported operating systems for application servers and batch servers	Supported operating systems for file servers	Supported operating systems for web servers
		Windows	• AIX • HP-UX PA-RISC • HP-UX IPF • SUSE Linux • Red Hat Linux • Solaris • Windows

License Codes

Refer to following URL for license codes for Oracle's PeopleSoft Enterprise line of products:
http://licensecodes.oracle.com/ent_keys_by_prod.html.

Prerequisites

The PeopleSoft Installer requires Java Virtual Machine (JVM), which is bundled for all OS platforms. The PeopleSoft Installer searches for the JVMs in the directories in which users would typically install JVM. If the search fails, the bundled JVM will be used. For the PeopleSoft Installer to run successfully, you must have JRE/JDK version 1.5.0 or higher.

Before running the PeopleSoft installer, you must verify that you have the correct patches for your JVM level.

For version 1.5.0, see <http://www-106.ibm.com/developerworks/java/jdk/aix/service.html>.

Note. If your installation is different than the vendor-defined JVM Search Path, specify where you installed the Java home directory like this:

`-is:javahome <JAVA_HOME>`

For example: `-is:javahome C:\myjdk1.5.0`.

You can always specify your Java home to minimize time searching JVM.

Make sure you have at least 4.5 GB of free space to perform your installation. If you are installing Enterprise Resource Planning Connectors, you will need an additional 400 MB of disk space.

See Running the PeopleSoft Installer.

The installation process also requires at least 1.5 GB of free temporary disk space, which is needed only for the duration of the process. The process uses the directory defined by the TEMP environment variable on your installation computer.

The user who installs PeopleTools must be root or the owner of <PS_HOME>.

You must have admin privileges to install the PeopleSoft web server.

Task 4-1: Using E-Delivery for the PeopleSoft Installation

You can obtain the software by downloading it as a zip file from a secure FTP site. E-Delivery customers receive a welcome letter that includes the URL for the PeopleSoft E-Delivery site. When you unzip the downloaded file, it creates a folder and extracts all the files into the folder. You can then copy the folder and its contents to any machines that you will use as servers.

The E-Delivery installation process asks for your license code. Obtain your license code by going to the URL included in your welcome letter.

If you obtain your software using E-Delivery, follow the instructions in this chapter for installing PeopleTools, but skip the sections concerning CD usage:

- Running the PeopleSoft Installer with a Single CD (Optional)
- Running the PeopleSoft Installer Without Swapping CDs (Optional)

If you obtain your software using E-Delivery, you must carry out an additional step after completing the installation process, creating the database, installing the Application Server, and installing the Pure Internet Architecture. Sign into the PeopleSoft system and navigate to the Installation table on the Products tab. The location of this table will vary depending upon the application you installed. In the Installation table, uncheck the products for which you have not purchased support.

Note. PeopleSoft does not support CDs that you burn at your own site from E-Delivery files.

See Also

“Setting Up the PeopleSoft Pure Internet Architecture,” Testing the PeopleSoft Pure Internet Architecture Installation

Application-specific installation instructions, PeopleSoft Customer Connection (Site Index, installation guides and notes)

Task 4-2: Running the PeopleSoft Installer with a Single CD-ROM Drive (Optional)

The following information is provided for mounting PeopleTools 8.4x CDs for a single CD-ROM drive or mounting multiple CDs for easier access.

```
** SET THE DISPLAY- for the UNIX box
$> export DISPLAY=0.0
```

To run the PeopleSoft Installer on a machine with a single CD:

1. Open two DOS command prompts (referred to here as CMD1 and CMD2).
2. In CMD1, mount the first PeopleTools CD to a directory (for example, D:\cdrom).
3. In CMD2, go to any directory *except* D:\cdrom (for example, C:\tmp).

Run the PeopleSoft Installer, pointing to the executable in D:\cdrom—for example:

```
D:\cdrom\setup.exe -is:tempdir $HOME\tmp
```


4. Go through the install prompts in CMD2.
5. When prompted in CMD2 to swap media (to change to media 2), go back to CMD1.
Eject the CD, then insert the second PeopleTools CD into D:\cdrom.
6. In CMD2, press ENTER to continue the install.
7. Repeat steps 5 and 6 for all the CDs.

Task 4-3: Running the PeopleSoft Installer Without Swapping CDs (Optional)

To avoid swapping CDs, you can copy the contents of the eight CDs to a network share. Create a directory for each CD, for example, N:\PT849install\disk1, N:\PT849install\disk2, N:\PT849install\disk3, and so on to N:\PT849install\disk8. Copy the contents of each CD to the respective directory.

Task 4-4: Running the PeopleSoft Installer

This section discusses:

- Understanding the PeopleSoft Installer
- Starting the PeopleSoft Installer
- Running the PeopleSoft Installer in GUI Mode

Understanding the PeopleSoft Installer

The PeopleSoft Installer guides you through the process of installing files to your various servers. You must run the PeopleSoft Installer on each machine that you use for one or more PeopleSoft server.

The files will be installed into a high-level PeopleSoft directory. This directory, which is referred to in this documentation as <PS_HOME>, is the location for PeopleTools, application, and multilanguage files. It is a good idea to use a directory name that indicates the application you are installing and the version number, such as HRMS881 for the 8.8 SP1 version of Human Resources.

The following error may appear during your installation:

```
.....The wizard cannot continue because of the following error: could not  
load wizard specified in /wizard.inf (104)
```

If you see this error message during the installation of PeopleTools, your application CDs, PeopleSoft Pure Internet Architecture, or when using the Database Configuration Wizard, run <PS_HOME>\setup\uninstall_endorsed.bat to uninstall the xerces.jar file that is located in the <PS_HOME>\jre\lib\endorsed directory. Run <PS_HOME>\setup\install_endorsed.bat again to install this xerces.jar back after your installation is complete. This problem happens only when the xerces.jar is installed in <PS_HOME>\jre\lib\endorsed and when this JRE is used for the installation.

Note. The machine that you use to perform your PeopleTools installation must be running in *256-color mode* or higher when running the CD install, PeopleSoft Pure Internet Architecture install, and Database configuration in Windows. This is not necessary for console mode.

The PeopleSoft Installer asks whether you want to install supporting features such as Enterprise Resource Planning Connectors, Unicode support, or Environment Management Hub. Before you run the PeopleSoft Installer, you may want to consult supporting documentation to help you in choosing these options. To confirm that Enterprise Resource Planning Connectors will run on the operating systems and database platforms you are using, consult the Hardware and Software Requirements book.

See Also

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Integration Broker

Enterprise PeopleTools 8.49 PeopleBook: Global Technology

Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration

Enterprise PeopleTools 8.49 Hardware and Software Requirements, “Server Requirements”

Task 4-4-1: Starting the PeopleSoft Installer

To start the PeopleSoft Installer in GUI mode, type:

```
[path]setup.exe [additional flags]
```

These are the additional flags:

Flag	Description
-is:tempdir <<specify the temp dir>>	Use this flag to specify the temporary directory to extract temporary files and the bundled JRE if Java is not found. This is needed if you have less than 1.5 GB of free disk space in your temp directory.
-is:log <<specify the log file>>	Use this flag to create a log file if you encountered problems with the native launcher.
-is:javahome <<specify the java home directory>> For example, -is:javahome c:\myjdk1.5.0	Use this flag to specify where you installed the Java home directory, if your installation is different than the vendor-defined JRE Search Path.

Note that the PeopleTools installation spans two or more CDs. During the installation process, if you are running the installer with a single CD-ROM drive, you will be prompted to swap to the next CD before you can proceed. To avoid swapping CDs during the installation process, you need to copy the contents of all CDs to a network share (in a very specific way) before launching the PeopleSoft Installer. For example, copy the contents of the first CD to n:\ps\tools\disk1, the contents of the second CD to n:\ps\tools\disk2, and so on. Then launch the setup.exe that is located at n:\ps\tools\disk1.

If you mounted your CDs as described in the task “Running the PeopleSoft Installer Without Swapping CDs,” you will not be prompted to swap CDs during the installation.

Task 4-4-2: Running the PeopleSoft Installer in GUI Mode

To run the PeopleSoft Installer in GUI mode:

1. Launch the installer. Click Next when you see the Welcome screen.
2. Click the radio button to accept the license agreement and click Next.
3. Enter your license code and click Next.
4. Choose a Unicode or non-Unicode database and click Next.

Note. Unicode databases are beneficial if you intend to deploy your applications globally and would otherwise have to implement multiple databases to handle different languages. However, Unicode databases require much more disk space than non-Unicode databases.

See *Enterprise PeopleTools 8.49 PeopleBook: Global Technology*.

5. Select the servers you want to install and click *Next*.

Note. If you do not have admin privileges, you will not be able to install PeopleSoft web server. You will have to either acquire admin privileges or deselect the Web Server option to continue.

Note. You can install multiple servers at the same time, but they will all be installed on the same machine. If you want to install servers on separate machines, you need to run the PeopleSoft Installer on each server machine.

Note. You *must* install the PeopleSoft software on your database server in order to run the PeopleSoft Database Configuration Wizard.

Note. You must select the web server if you want to install Enterprise Resource Planning Connectors.

See “Creating a Database.”

6. Specify the directory where you want to install PeopleTools and click *Next*.

Note. Please substitute your network drive and the directory name of your choice for the default selection. The installation directory name cannot contain a space. Note that directory names containing periods or non-US-ASCII characters may not work with some additional component software.

7. Choose whether to install Enterprise Resource Planning Connectors. If you choose Yes, specify the installation directory. Note that this directory must not be the location in which PeopleTools is installed, or a subdirectory of that directory.

Note. The Enterprise Resource Planning Connectors feature is supported on Windows. PeopleSoft provides access to an additional software product, iWay SOAPswitch, which provides ERP adapters, or connectors, that generate Web Service Description Language (WSDL) for bridging to SAP, Oracle, and Siebel development environments. You can then easily import the WSDL into PeopleSoft to create the desired integration points. For information on configuring iWay SOAPswitch consult the PeopleSoft Integration Broker PeopleBook.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Integration Broker*

Note. If you need to refer to the ERP installation log files, they will either be in your user home directory or in the directory in which ERP is installed.

8. Specify the location of your Connectivity Program Directory and click *Next*.

The location of the Connectivity Program Directory varies depending upon the version of SQL Server that you are using. In case of SQL Server 2000 C:\Program Files\Microsoft SQL Server\80\Tools\Binn should be used and for SQL Server 2005 the ONLY connectivity available by default is under C:\Program Files\Microsoft SQL Server\90\Tools\Binn.

The default location for the connectivity software for your platform (as set by the vendor) is listed in the following table. If the database connectivity software was installed to a different directory, enter that path instead.

Platform Name	Default Location of Database Connectivity Libraries
SQL Server	C:\Program Files\Microsoft SQL Server\80\Tools\Binn

9. Depending on the PeopleSoft servers you selected, choose whether to install the PeopleTools icons and click *Next*.
10. If you elected to install PeopleTools icons, choose a valid group folder in which to create them and click *Next*.
11. At this point, enter the configuration information for Environment Management.

Select the machine name of the web server running the Environment Manager Hub. (This will very likely be the machine on which you run PIA). Select the hub port number (the default is 80). This needs to match the PIA port. If you change the port number for the PIA configuration, you must also change the web server listener port number for all the agents in the configuration.properties file.

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*, “Using Environment Management Component.”

12. The next screen lists the PeopleTools components (features) for which you are licensed. Accept the defaults for the PeopleTools features and click *Next*.

- Select *PeopleTools* to install PeopleTools and the PeopleSoft Pure Internet Architecture. This component contains the core PeopleTools files and is required for the proper operation of the PeopleSoft system and the PeopleSoft Pure Internet Architecture.
- Select *PeopleTools System Database* to allow your developers to create custom PeopleTools applications outside of the delivered PeopleSoft Application.
- The *PeopleTools Language Pack* and *PeopleTools Language Development Kit* contain the translated PeopleTools DLLs and the resource files and headers needed to build them.

Select *PeopleTools Language Pack* if you plan on running the Windows components of the installation in languages other than English. This component contains the compiled PeopleSoft translations for the Windows client. If you are not using multiple languages throughout your implementation, you do not need this component.

Select *PeopleTools Language Development Kit* if you plan on modifying or creating your own new translations for the PeopleTools Windows client components. It contains the source and header files required to modify and compile new versions of these translations. Again, you do not need this component if you are not using multiple languages.

13. You will see an installation confirmation window. If the information is correct, choose Next. If you need to modify any of the information, choose the Back button and make your changes.
14. If prompted, change your CD during the installation process.
15. After the files have been installed, click *Finish* to complete the setup.

Note. If you have chosen to install ERP connectors, you see an informational message indicating that they are being installed.

Task 4-5: Installing the Application CD

After installing the PeopleTools CD, install the application CD to the same <PS_HOME> directory. The screens may look slightly different depending upon which application you install.

Note. If you are installing more than one application, it is a good idea to create an application-specific <PS_HOME> and carry out an installation of PeopleTools for each application. This helps you to maintain your applications more efficiently, since you can easily match each application version to the correct version of PeopleTools.

Note. To properly install a Demo database, you must select both the System Database and the Demo Database options during the installation of your PeopleSoft applications.

Note. The next chapter discusses the installation of the application database component to the database server.

The following information is provided for mounting PeopleTools 8.4x CDs for a single CD-ROM drive or mounting multiple CDs for easier access.

```
**SET THE DISPLAY- for the UNIX box
$> export DISPLAY=0.0
```

To install the application CD:

1. Insert the application CD into the CD-ROM drive and run the setup application from the root directory of the CD.

See Running the PeopleSoft Installer.

2. After reading the Welcome information, click Next.
3. Click Yes to agree to the Software License Agreement.
4. Enter the PeopleSoft license code and click Next.

Note. All modules for the product line you are installing exist on the PeopleSoft Application and Database CDs regardless of the modules purchased. Your unique license code will “unlock” the combination of modules you purchased. A master license key no longer exists.

5. Choose a *Unicode* or a *non-Unicode* database and click Next.
6. Select the servers you want to install and click Next.

7. Specify the directory where you want to install the application. You must specify the <PS_HOME> directory; that is the directory where you installed PeopleTools for a given server. Click Next.
8. A feature selection screen appears. (What you see depends on what product you are installing.) Select the features that you wish to install and click Next.
9. In the confirmation dialog box, click Next to begin the installation. A message box appears that indicates the progress of the installation.
10. Click Finish to exit the PeopleSoft installation program.

Task 4-6: Loading the Multilanguage CD

If you have licensed and selected to install languages other than English, you need to load the application-specific PeopleSoft Multilanguage CD. Each application CD has a corresponding Multilanguage CD that contains all the non-English translations.

Warning! The release numbers for the application CD and the Multilanguage CD must be in sync. For example, if you are installing HRMS 8.3, you can only use the Multilanguage CD HRMS 8.3 ML; you cannot use HRMS 8 SP1.

Note. Load the Multilanguage CD after you install the PeopleTools CD and the Application CD. Install the Multilanguage CD to the same <PS_HOME> as you used for the PeopleTools and Application CD.

To load the Multilanguage CD:

1. Insert the Multilanguage CD into the CD-ROM drive and run the setup application from the root directory of the CD.
2. After reading the Welcome message, click Next.
3. Click Yes to agree to the Software License Agreement.
4. Enter the PeopleSoft license code and click Next.
5. Choose to create a *Unicode* or a *non-Unicode* database and click Next.
6. You will be asked to select the components you want to install.
(What you see depends upon what product you are installing.) Select the applications you want to install and click Next.
7. From the confirmation dialog box, click Next to begin the installation.
A message box appears indicating the progress of the installation.
8. Click Finish to exit the PeopleSoft installation program.

CHAPTER 5

Setting Up the Windows File Server

This chapter discusses:

- Understanding the File Server
- Mapping a Drive on the Install Workstation
- Installing the PeopleTools CD to the File Server
- Installing the Application CD
- Loading the Multilanguage CD

Understanding the File Server

The file server is the environment (or file) repository for the PeopleTools Development Environment, which is required for the Database Configuration Wizard to run. The file server is also used for the files necessary to perform an upgrade. This includes Upgrade Assistant or Change Assistant and all of the executables and scripts necessary to perform an upgrade. You will apply patches and updates from PeopleSoft Customer Connection directly to the file server and then copy the updated files to your other servers. In addition, the file server is a source repository for COBOL and SQR.

See “Preparing for Installation,” Installing Supporting Applications.

Note. If you are working only on Windows, and you set up your file server in the previous chapter, you can skip this chapter.

Note. If you have used the PeopleSoft Server Transfer program in the past, it is no longer needed, because the PeopleSoft Installer lets you install files directly to the designated server.

In some cases you may choose to set up local copies of the PeopleSoft executables on the PeopleTools Development Environment and Windows batch servers, rather than mapping to a shared directory on the file server. You can use the instructions in this chapter to perform such local installations.

Warning! The PeopleSoft Installer installs COBOL source code from the CD to your Windows file server, but not to the rest of your Windows servers.

If you are running Windows and your application requires COBOL, we require that you maintain a central repository of your COBOL source code on the file server. If you apply a patch or make customizations, apply them to the file server first, and then disseminate them across your servers as described here. If you have Windows file, application, and batch servers, you should compile the COBOL on the file server and copy the cblbina, cblbinu, or cblbine directory (depending on whether you have an ASCII, Unicode or EBCDIC database) to all the application and batch servers. The COBOL compiler itself does not have to be on the file server—as long as the workstation on which it is installed has full access to the shared drives.

Task 5-1: Mapping a Drive on the Install Workstation

If you need to install the CDs to the file server from a networked install workstation, map a drive letter to the top-level PeopleSoft directory (<PS_HOME>) from the install workstation. The <PS_HOME> directory must be shared, and you must have write permission from the install workstation to the file server. The <PS_HOME> directory was discussed in the previous chapter.

See “Using the PeopleSoft Installer.”

Note. If you install the CDs directly from the file server's CD-ROM drive, you can skip this task. Installing directly from the file server is preferable for installation because you do not need a drive to be mapped. It also provides faster performance, as there is no need for a network connection between the workstation and the server.

From the install workstation, create a logical drive that points to the <PS_HOME> directory.

On a Windows network, use Windows Explorer to map to the drive on the file server to which you are installing; or use the NET USE command, for example:

```
NET USE N: \\SERVER1\<PS_HOME>
```

On a Novell network, use the MAP command:

```
MAP ROOT N:=SERVER1/SYS:<PS_HOME>
```

In this example, *SERVER1* is the name of the file server.

Task 5-2: Installing the PeopleTools CD to the File Server

To install the PeopleTools CD-ROM to the file server:

1. Insert the PeopleTools CD into the CD-ROM drive and run the setup application from the root directory of the CD.
A welcome screen appears.
2. Click Next.

The licensing agreement appears.

3. Click Yes and enter your 31-digit license code from the license code sheet.
4. Click Next and choose whether to use a Unicode or a non-Unicode database.

See "Preparing for Installation," Planning Multilingual Strategy.

Note. Unicode databases are beneficial to customers who intend to deploy their applications globally and would otherwise have to implement multiple databases to handle different languages. However, Unicode databases require much more disk space than non-Unicode databases.

See *Enterprise PeopleTools 8.49 PeopleBook: Global Technology*.

5. Select *PeopleSoft File Server* and click Next.
6. Click the Browse button, choose the path of the <PS_HOME> directory on the file server, and click OK. Click Next.
7. Choose whether to install the Enterprise Resource Planning connectors.

If you choose Yes, specify the installation directory. Note that this directory must not be the location in which PeopleTools is installed, or a subdirectory of that directory.

Note. The Enterprise Resource Planning Connectors feature is supported on Windows, Solaris, AIX, HP-UX, and Linux. (If you are on another platform, you will not see this screen.) PeopleSoft provides access to an additional software product, iWay SOAPswitch, which provides ERP adaptors, or connectors, that generate Web Service Description Language (WSDL) for bridging to SAP, Oracle, and Siebel development environments. You can then easily import the WSDL into PeopleSoft to create the desired integration points. For information on configuring iWay SOAPswitch consult the PeopleSoft Integration Broker PeopleBook.

See *Enterprise PeopleTools 8.49 PeopleBook: Integration Broker*.

8. Select the location of your connectivity software.

This varies depending on the version of SQL Server you are using. In case of SQL Server 2000 C:\Program Files\Microsoft SQL Server\80\Tools\Binn should be used and for SQL Server 2005 the ONLY connectivity available by default is under C:\Program Files\Microsoft SQL Server\90\Tools\Binn.

The default location for your connectivity software (as set by the vendor) is listed in the following table. If the database connectivity software was installed to a different directory, enter that path instead.

Platform Name	Location of Database Connectivity Libraries
SQL Server	C:\Program Files\Microsoft SQL Server\80\Tools\Binn

9. In the next dialog box, choose Yes to install an Installation icon group on the install workstation. Then click Next.
10. Then specify the desired program group folder (the default is PeopleTools 8.4 Installation) and click Next (a program folder name cannot contain any of the following characters: \ / : * ? " < > |). This step creates an icon group on the installing machine that supplies shortcuts to every program needed throughout the installation process.
11. Enter the configuration information for Environment Management.

Select the machine name of the web server running the Environment Manager Hub. (This will very likely be the machine on which you run PIA). Select the hub port number (the default is 80). This needs to match

the PIA port. If you change the port number for the PIA configuration, you must also change the web server listener port number for all the agents in the configuration.properties file.

See *Enterprise PeopleTools 8.49 PeopleBook: Software Updates*, “Configuring and Running Environment Management Components.”

12. A component selection window appears. This screen lists the PeopleTools components for which you are licensed. Select the products to install from the Components list.

Note. The components PeopleTools Language Pack and PeopleTools Language Development Kit contain the translated PeopleTools DLLs and the resource files and headers needed to build them. If you do not need translated files, you may choose to not install these two components.

- Select *PeopleTools* to install PeopleTools Development Environment and the Upgrade Environment. This component contains the core PeopleTools files and is required for the proper operation of your PeopleSoft Development and Upgrade environment.
- Select *PeopleTools Language Pack* if you plan on running the Windows components of your installation in languages other than English. This component contains the compiled PeopleSoft translations for the Windows client. If you are not using multiple languages throughout your implementation, you don't need this component.
- Select *PeopleTools Language Development Kit* if you plan on modifying or creating your own new translations for the PeopleTools Windows client components. It contains the source and header files required to modify and compile new versions of these translations. Again, you do not need this component if you are not using multiple languages.
- Select *PeopleTools System Database* to allow your developers to create custom PeopleTools applications outside of the delivered PeopleSoft Application.

13. Click Next. You should see the Confirm Products dialog box.
14. Click Next to verify that you want to install to the specified directory. You'll see a progress indicator so you can monitor the progress of your installation.
15. When the setup program successfully completes the installation of PeopleTools, click Finish to exit the installation program.

Task 5-3: Installing the Application CD

After installing the PeopleTools CD, install the application CD to the same <PS_HOME> directory. The screens may look slightly different depending upon which application you install.

Note. If you are installing more than one application, it is a good idea to create an application-specific <PS_HOME> and carry out an installation of PeopleTools for each application. This helps you to maintain your applications more efficiently, since you can easily match each application version to the correct version of PeopleTools.

Note. To properly install a Demo database, you must select both the System Database and the Demo Database options during the installation of your PeopleSoft applications.

Note. The next chapter discusses the installation of the application database component to the database server.

The following information is provided for mounting PeopleTools 8.4x CDs for a single CD-ROM drive or mounting multiple CDs for easier access.

```
**SET THE DISPLAY- for the UNIX box
$> export DISPLAY=0.0
```

To install the application CD:

1. Insert the application CD into the CD-ROM drive and run the setup application from the root directory of the CD.

See Running the PeopleSoft Installer.

2. After reading the Welcome information, click Next.
3. Click Yes to agree to the Software License Agreement.
4. Enter the PeopleSoft license code and click Next.

Note. All modules for the product line you are installing exist on the PeopleSoft Application and Database CDs regardless of the modules purchased. Your unique license code will “unlock” the combination of modules you purchased. A master license key no longer exists.

5. Choose a *Unicode* or a *non-Unicode* database and click Next.
6. Select the servers you want to install and click Next.
7. Specify the directory where you want to install the application. You must specify the <PS_HOME> directory; that is the directory where you installed PeopleTools for a given server. Click Next.
8. A feature selection screen appears. (What you see depends on what product you are installing.) Select the features that you wish to install and click Next.
9. In the confirmation dialog box, click Next to begin the installation. A message box appears that indicates the progress of the installation.
10. Click Finish to exit the PeopleSoft installation program.

Task 5-4: Loading the Multilanguage CD

If you have licensed and selected to install languages other than English, you need to load the application-specific PeopleSoft Multilanguage CD. Each application CD has a corresponding Multilanguage CD that contains all the non-English translations.

Warning! The release numbers for the application CD and the Multilanguage CD must be in sync. For example, if you are installing HRMS 8.3, you can only use the Multilanguage CD HRMS 8.3 ML; you cannot use HRMS 8 SP1.

Note. Load the Multilanguage CD after you install the PeopleTools CD and the Application CD. Install the Multilanguage CD to the same <PS_HOME> as you used for the PeopleTools and Application CD.

To load the Multilanguage CD:

1. Insert the Multilanguage CD into the CD-ROM drive and run the setup application from the root directory of the CD.
2. After reading the Welcome message, click Next.
3. Click Yes to agree to the Software License Agreement.
4. Enter the PeopleSoft license code and click Next.
5. Choose to create a *Unicode* or a *non-Unicode* database and click Next.
6. You will be asked to select the components you want to install.
(What you see depends upon what product you are installing.) Select the applications you want to install and click Next.
7. From the confirmation dialog box, click Next to begin the installation.
A message box appears indicating the progress of the installation.
8. Click Finish to exit the PeopleSoft installation program.

CHAPTER 6

Setting Up the Install Workstation

This chapter discusses:

- Understanding the Install Workstation
- Prerequisites
- Starting Configuration Manager
- Setting Startup Options
- Editing the Default Profile
- Running Client Setup

Understanding the Install Workstation

This chapter describes how to set up a PeopleSoft Windows-based client for connecting to the database server in two-tier mode, specifically for the purpose of performing install-related tasks from the workstation. You must configure at least one two-tier Windows-based client for running Data Mover and SQR processes required for setting up the batch server and for creating the PeopleSoft database. For some installations you may wish to set up multiple install workstations, so that you can perform asynchronous tasks at the same time; for example, you could create and populate multiple databases simultaneously. You can quickly configure multiple workstations by exporting a configuration file from one workstation and importing it to another workstation.

See Also

Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration

Prerequisites

The following tasks are prerequisites for setting up the install workstation:

- The Workstation must have database connectivity software installed.
- You must have planned your database creation strategy. You should know the precise names of the databases that you intend to create.
- Make sure that you have created your connect strategy. You must use a Connect ID. You should know both the Connect ID and Connect password.
- The workstation must have a logical drive mapped to <PS_HOME> on the file server (or, if the file server and install workstation are one and the same, <PS_HOME> can be installed on a local drive).

- The person performing the installation must have read access to the <PS_HOME> directory.

If this is the same workstation on which the CD installation was performed, it should have a PeopleTools 8.4 Installation program group, which was created when you loaded the PeopleTools CD-ROM. This isn't a requirement, but it does make it more convenient to run the PeopleTools install applications.

See Also

“Preparing for Installation”

“Setting Up the File Server”

Task 6-1: Starting Configuration Manager

Configuration Manager is a utility for configuring workstations being used as the PeopleTools Development Environment. These are its principal functions:

- Sets up and make changes to PeopleSoft configuration settings.
- Creates a program group containing Windows shortcuts to PeopleSoft applications.
- Installs local DLLs.
- Installs the PeopleSoft ODBC driver, which is used for PeopleSoft Open Query and for Crystal Reports, and sets up an ODBC user data source name (DSN).

The first time you run Configuration Manager on the client, it will populate certain fields with default values specified in a configuration file stored on the file server, specifically: <PS_HOME>\setup\pstools.cfg. This configuration file was set up when you ran the CD installation. Once you set up and run Configuration Manager, it will populate fields using values that are stored in the Windows system registry.

To start Configuration Manager, do one of the following:

- Select *Start, Programs, PeopleTools 8.4 Installation, Configuration Manager*. (This program group will be available if you installed the PeopleSoft CDs from this workstation.)
- If the *PeopleSoft 8.4* program group was not installed on this workstation, run pscfg.exe directly from the <PS_HOME>\bin\client\winx86 directory on the file server.

Task 6-2: Setting Startup Options

The Startup tab of Configuration Manager sets the default options for the PeopleSoft sign-on screen that is used for connecting to a PeopleSoft database. It also contains a setting that specifies the local directory for storing cached PeopleSoft data.

To set Startup options:

1. Make sure you are viewing the Configuration Manager Startup tab (this tab is what you see if you started Configuration Manager as described in the previous task).

Set the following options:

- *Database type* — Verify the type of RDBMS. This should already be set to Microsoft SQL Server.

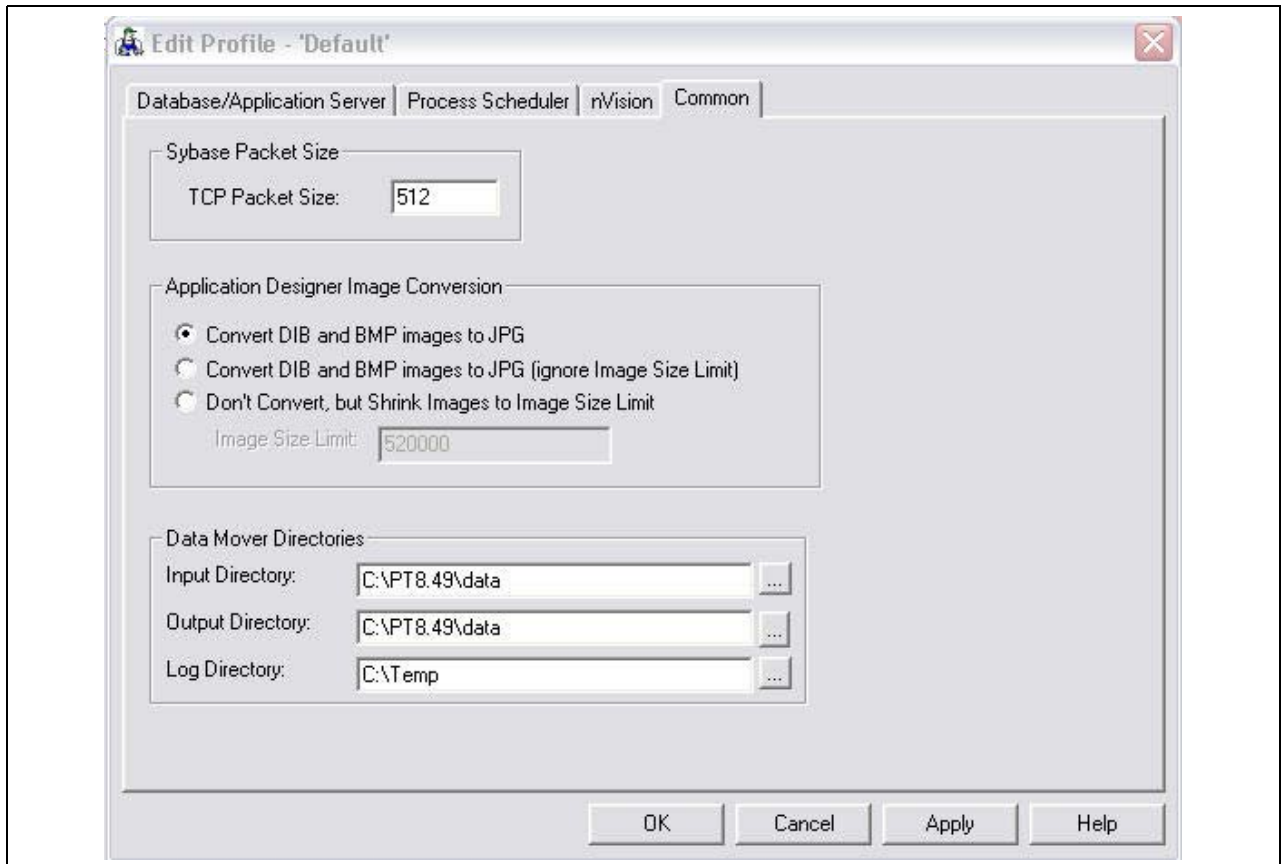
- *Application Server Name* — This option appears if you select a database type of Application Server. It is where you enter your application server name if you are setting up a three-tier connection.
 - *Server Name* — The name of the MSS database server to connect to. This is used for setting up the ODBC connection later in this chapter.
 - *Database name* — The name of the default database to connect to. Enter the name of one of the databases that you intend to create.
 - *User ID* — The name of the default user that will appear in the sign-on screen. This can be any valid user name, although for installation setup it normally matches the name of one of the built-in PeopleSoft users (typically PS or VP1) that will be installed in the database.
 - *Connect ID and Connect Password* — Type your connect ID and password into these fields. Connect ID is required for PeopleSoft 8.
2. Select the Crystal/Bus. Interlink/JDeveloper tab and set the following options:
 - *Crystal EXEs Path* — Set this to the location of your Crystal Reports executables.
 - *Default Crystal Reports* — Set this to the path on the file server where the Crystal reports reside. Note that the specified path should not contain reports run in production. This option is used when running from PSQuery to Crystal.
 - *Use trace during execution* — This option is used when running Crystal Reports from Process Scheduler on the client.
 - *Business Interlink Directory* — You can leave this option blank. If you do so, the system uses its default directory <PS_HOME>\bin\<client>|<server>\winx86\interfacedrivers.
 - *JDeveloper Directory* — See the appendix “Using the XSLT Mapper with Oracle BPEL Process Manager” for information on using this option.

Task 6-3: Editing the Default Profile

Begin by editing the default profile for the workstation. Among other things, this will verify that the paths to <PS_HOME> and its subdirectories are correctly set, which is required for subsequent tasks.

To edit the default profile:

1. Select the Profile tab in Configuration Manager. Only one profile, the Default Profile, has been defined.
2. Select Edit to display the Edit Profile dialog box, and then select the Process Scheduler tab.
3. In the Process Scheduler tab, verify the following options; these should have been set correctly by the CD installation program:
 - Verify that the PeopleSoft Home Directory (PS_HOME) field is set to the path to <PS_HOME> on the file server.
 - Set the SQR Executables (SQRBIN) field to the file server directory where SQR for Windows was installed when you ran the PeopleSoft Installer.
 - Set the SQR Flags (PSSQRFLAGS) field to `-ZIF<PS_HOME>\sqr\pssqr.ini`.
 - Set the SQR Report Search 1 (PSSQR1) field to `<PS_HOME>\sqr`. The remaining SQR Report Search fields can be left blank, because no additional SQR report directories have been created yet.
4. Select the Common tab of the Edit Profile dialog box.



Edit Profile dialog box

The following fields are used to set Data Mover default input, output, and log directories.

- Verify that the Input Directory and Output Directory fields are set to `<PS_HOME>\data`. This directory will store the Data Mover scripts required to populate the PeopleSoft database.
- Set the Log Directory to a local workstation directory to store the Data Mover log files. The default is `C:\TEMP`.

5. Select OK to close the Edit Profile dialog box.

See Also

Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration, “Using PeopleSoft Configuration Manager”

Task 6-4: Running Client Setup

The Client Setup tab does the following:

- Installs a PeopleSoft program group on the workstation.
- Installs the PeopleSoft ODBC driver required for Open Query and Crystal Reports.
- Installs system DLLs on the workstation.

These Client Setup functions are performed when you click OK or Apply from Configuration Manager only if the Install Workstation option on the Client Setup tab is selected.

Note. Any files installed by Client Setup on the workstation from the file server, including ODBC driver files, use the paths specified in the default profile.

To run Client Setup:

1. Select the Client Setup tab in Configuration Manager.
2. In the Group Title text box enter the name of the program group for the icons you want on the client workstation. (A program group name cannot contain any of the following characters: \ / : * ? " < > |)

You can call the program group anything you want, but this documentation uses the default name, *PeopleTools 8.4*.

3. If you do not have a PeopleTools 8.4 program group set up on the workstation, be sure to check the following two options for installing shortcuts to applications essential for installation:

Note. When you run Client Setup, it will uninstall any existing shortcuts in the PeopleTools 8.4 program group, and install shortcuts for the applications you have selected. If you subsequently want to install or uninstall shortcuts, you can always re-run Client Setup.

- *Data Mover*
- *Configuration Manager*

4. If applicable, select the option Install PeopleSoft ODBC Driver. This installs the ODBC driver, and sets up a user ODBC data source name required by PeopleSoft Query and by Crystal Reports.

Note. The option Install ODBC Driver Manager 3.5 installs the Microsoft ODBC drivers necessary to connect to a SQL Server database via ODBC (only applicable for Microsoft SQL Server). If you install the ODBC Driver Manager 3.5, reboot the workstation after running Client Setup. Any PeopleSoft workstation that is going to run Crystal Reports or Open Query *locally* should have the driver and the driver manager installed.

5. Select the option Install Workstation.

This check box determines whether Client Setup runs when you click Apply or OK in Configuration Manager. If this option is not selected, Client Setup will create or update settings in the registry, but it won't set up the PeopleTools 8.4 program group or install local DLLs.

6. Click OK to run Client Setup and close Configuration Manager.

See Also

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Query

Enterprise PeopleTools 8.49 PeopleBook: Crystal Reports for PeopleSoft

CHAPTER 7

Creating a Database

This chapter discusses:

- Understanding the Database Configuration Wizard
- Fulfilling PeopleSoft Database Configuration Wizard Prerequisites
- Running the Database Configuration Wizard
- Checking the Log Files and Troubleshooting
- Updating Database to Latest PeopleTools Release
- Running Additional Data Mover Scripts
- Installing a Multilingual PeopleTools System Database
- Running VERSION Application Engine Program
- Running SQR Reports
- Checking the Database
- Running Alter Audit

Understanding the Database Configuration Wizard

The Database Configuration Wizard is a tool designed to simplify your PeopleSoft database installation. When you run the Database Configuration Wizard, Data Mover is also running silently.

See *Enterprise PeopleTools 8.49 PeopleBook: Data Management*.

Important! Do not forget that application-specific installation steps are provided in a separate document specific to the application. For instance, if you are performing PeopleSoft CRM installation, you need both this PeopleTools installation guide and you also need any additional instructions provided by CRM. PeopleSoft Customer Connection provides installation guides that are specific to your application.

See PeopleSoft Customer Connection (Site Index, installation guides and notes).

You can still use the manual process for creating a PeopleSoft database instead of using the Database Configuration Wizard. The manual process is mandatory for some configurations.

See “Creating a Database Manually.”

Task 7-1: Fulfilling PeopleSoft Database Configuration Wizard Prerequisites

This section discusses:

- Installing the PeopleSoft Database Server Components on the Database Server
- Obtaining Windows Administrator Authority
- Setting Up the Collation

Task 7-1-1: Installing the PeopleSoft Database Server Components on the Database Server

To run the PeopleSoft Database Configuration Wizard, your setup *must* fulfill these requirements:

- You must have installed the PeopleTools software on your database server by running the PeopleSoft Installer.
- You must have chosen the Database Server option during the PeopleTools software installation.
- You must have installed the Database component of your application CD to your database server.
- You must have the PeopleTools Development Environment set up to create your database.
- You must run the Database Configuration Wizard at the database server.

Note. Before you can configure the database, the system administrator ID must have a corresponding password.

See Also

“Using the PeopleSoft Installer”

Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration, “Using PeopleSoft Configuration Manager”

Task 7-1-2: Obtaining Windows Administrator Authority

To run the Database Configuration Wizard, you must be a Windows administrator of the target server. This is necessary because the Database Configuration Wizard will start and stop the SQLServer service and create or modify several directories.

Task 7-1-3: Setting Up the Collation

The default collation for PeopleSoft databases is Latin1_General_Bin. If you want to use a collation other than Latin1_General_Bin, you will need to modify the createdb.sql script in the %PS_HOME%\scripts directory and replace Latin1_General_Bin with the desired collation before running the Database Configuration Wizard. PeopleSoft supports any sort that is case-, accent-, width-, and kana-sensitive.

If you modify the collation for the database you may also have to modify the sort order option in PeopleTools after you configure PIA. A modification in the collation usually impacts the sort order of the database.

See “Setting Up the PeopleSoft Pure Internet Architecture.”

Some components of PeopleTools cannot rely on the database to sort data and must do so in memory. The sort order option on the PeopleTools Options page enables you to select which sort order should be used by PeopleTools when sorting data in memory.

You should set this option soon after you have completed the installation of the database and your PIA environment; choose the option that most closely approximates the sort order that you selected when creating the database.

To set the sort order:

1. Select PeopleTools, Utilities, Administration, PeopleTools Options.
2. Select an option from the Sort Order Option drop-down list box.
3. Click Save.

Task 7-2: Running the Database Configuration Wizard

When you run the Database Configuration Wizard, Data Mover typically does the following:

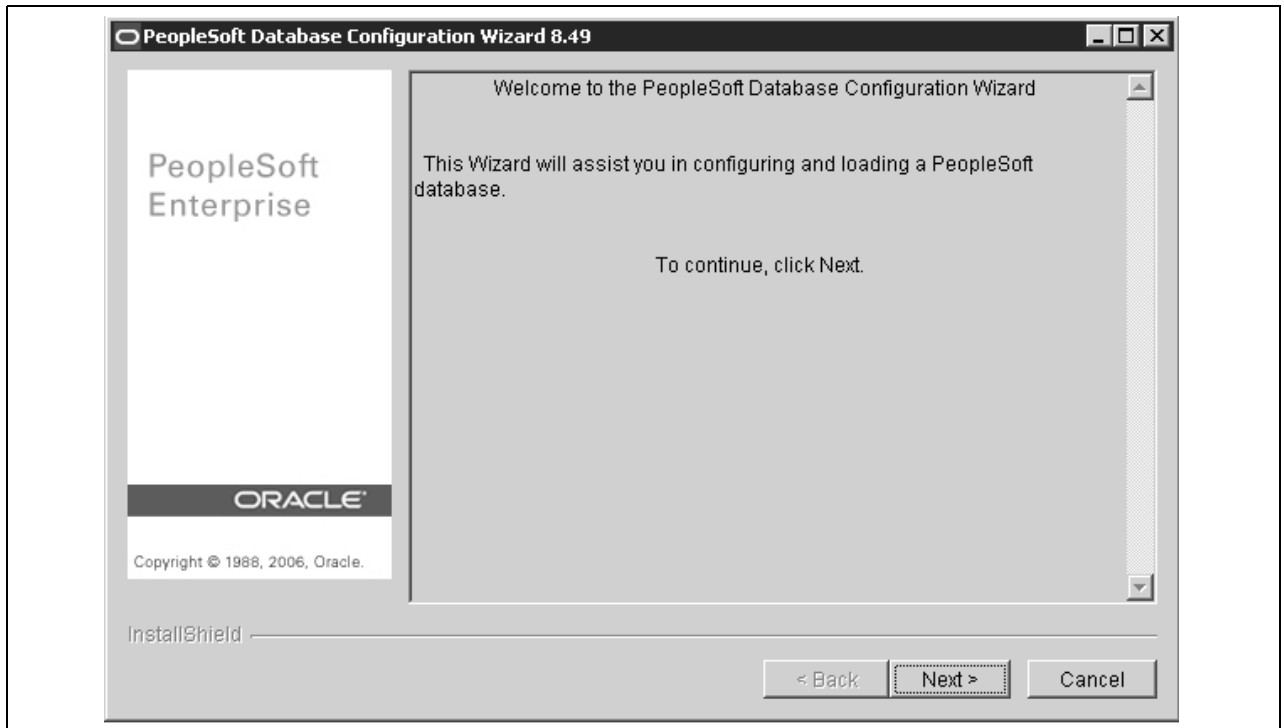
1. `IMPORT *` Create all the PeopleTools and application tables with their indexes.
2. `ENCRYPT_PASSWORD *` Encrypt security information for the database.
3. `CREATE_TRIGGER *` Create application required triggers.
4. `REPLACE_VIEW *` Create PeopleSoft views.
5. `CREATE_TEMP_TABLE *` Create PeopleSoft temporary tables.

If Data Mover fails at any of the above steps, it will complete the rest of the step, but will not start the next step—instead the Wizard aborts and tells the user what file to review for the detailed error message. There is a separate log file for each step, saved in the log directory. If Data Mover fails at step 1 or 2, it is fatal. If Data Mover fails at step 3 or 4, it is not necessarily fatal. You may continue the next steps manually.

Note. When installing an application database, the Database Configuration Wizard may fail when creating the view `PTLT_SCOMP_VW1` if the database was delivered on a PeopleTools release prior to 8.48. This error may be ignored. The view will be created correctly in a later step.

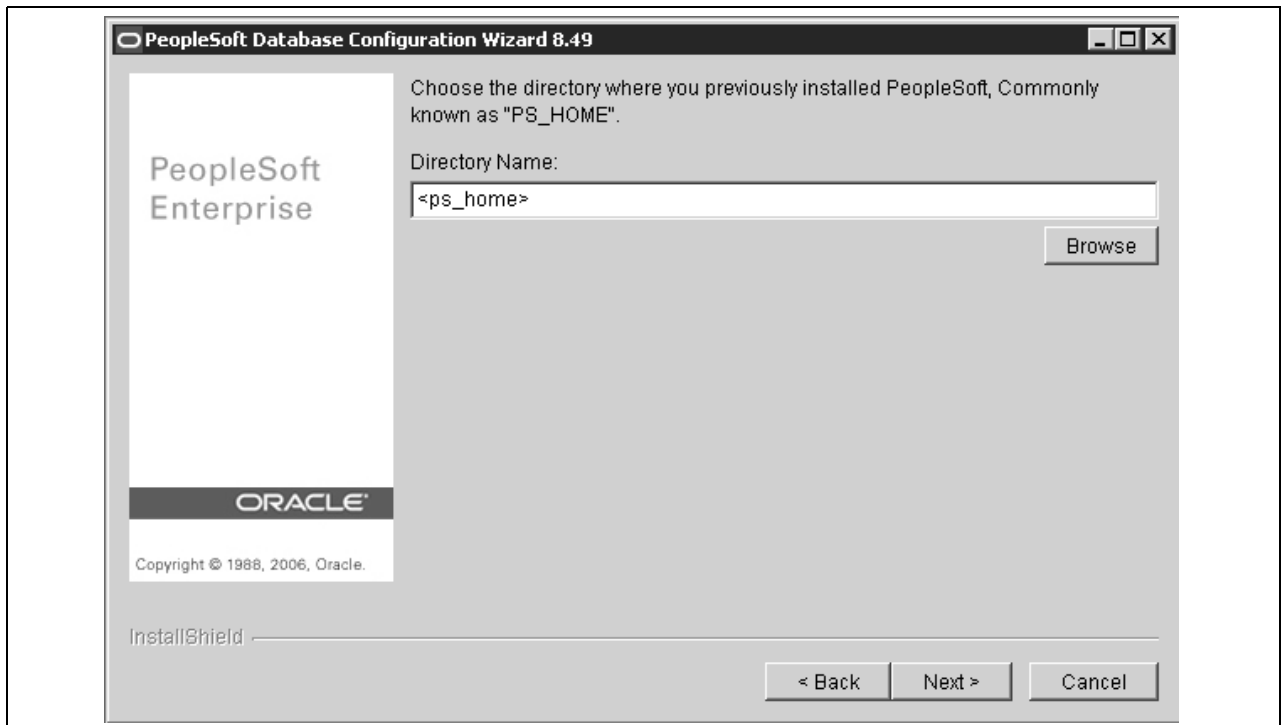
To run the Database Configuration Wizard:

1. From the directory `<PS_HOME>\setup\PsMpDbInstall`, double click `setup.exe`.
2. In the Welcome window, click Next to continue.



PeopleSoft Database Configuration Wizard Welcome window

3. When prompted for the location of PS_HOME, modify the directory name to reflect your <PS_HOME> installation (the high level directory where you installed the PeopleTools and application software) and click Next to continue.



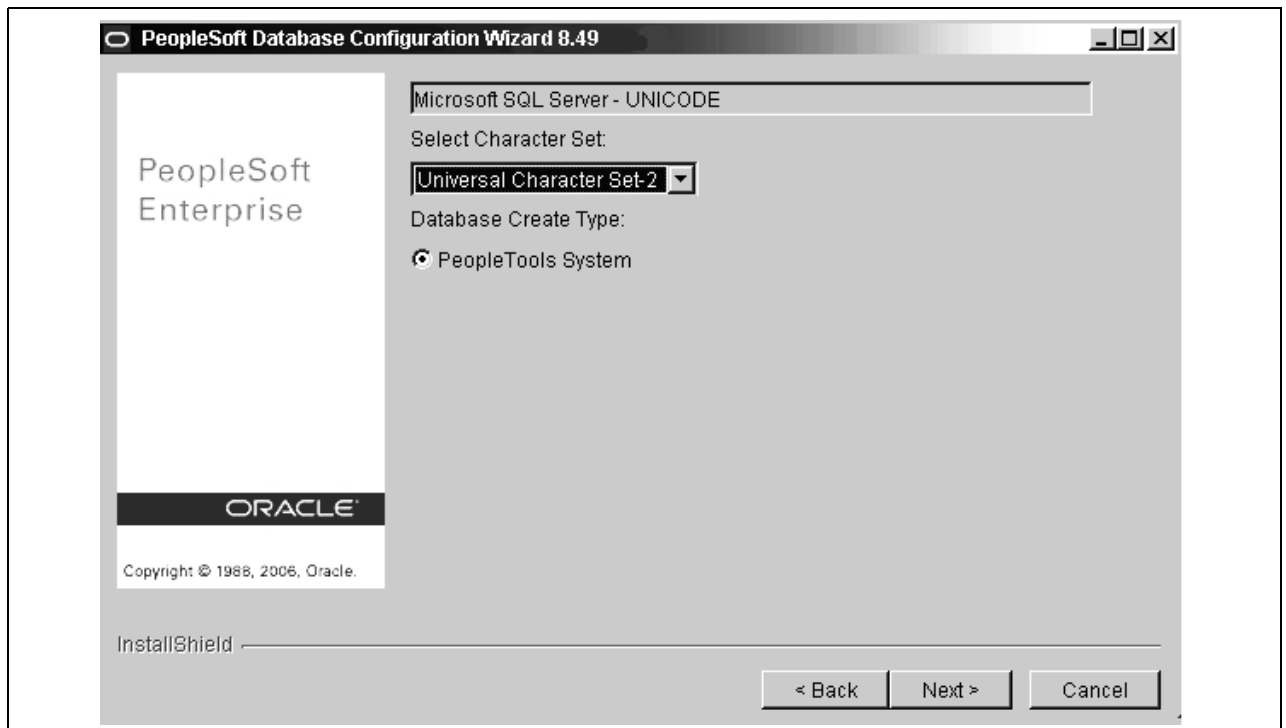
Entering the PS_HOME directory on the Database Configuration Wizard window

4. Select Unicode or Non-Unicode, based upon the language strategy you defined in chapter 1, under "Planning Multilingual Strategy."

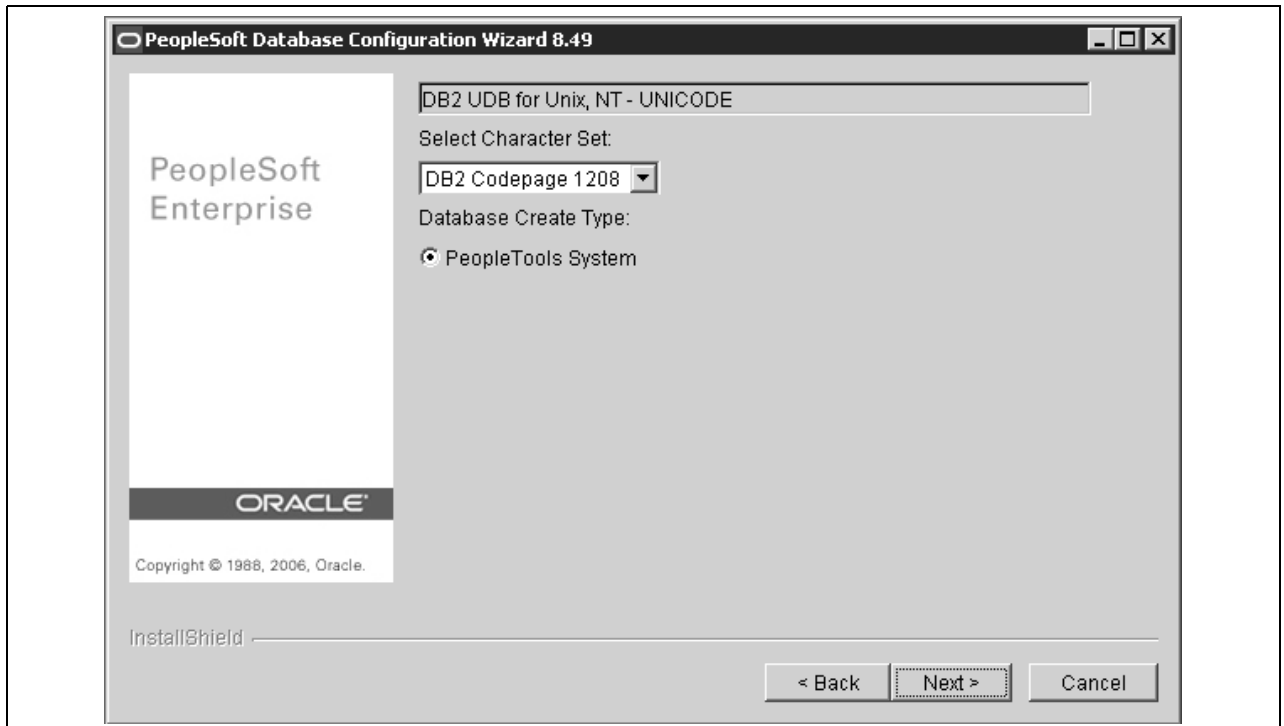
5. If you select Non-Unicode, select the appropriate character set and database type.

Select the character set that best supports your language. There is more information about code pages in the SQL Server Books Online, under “collations.”

Note. The Wizard detects which database files are available for loading based on your specific installation; you will only see the database types that are valid based on the PeopleSoft application features you have installed.



Selecting a character set on the Database Configuration Wizard window



Choosing a character set for a Unicode database

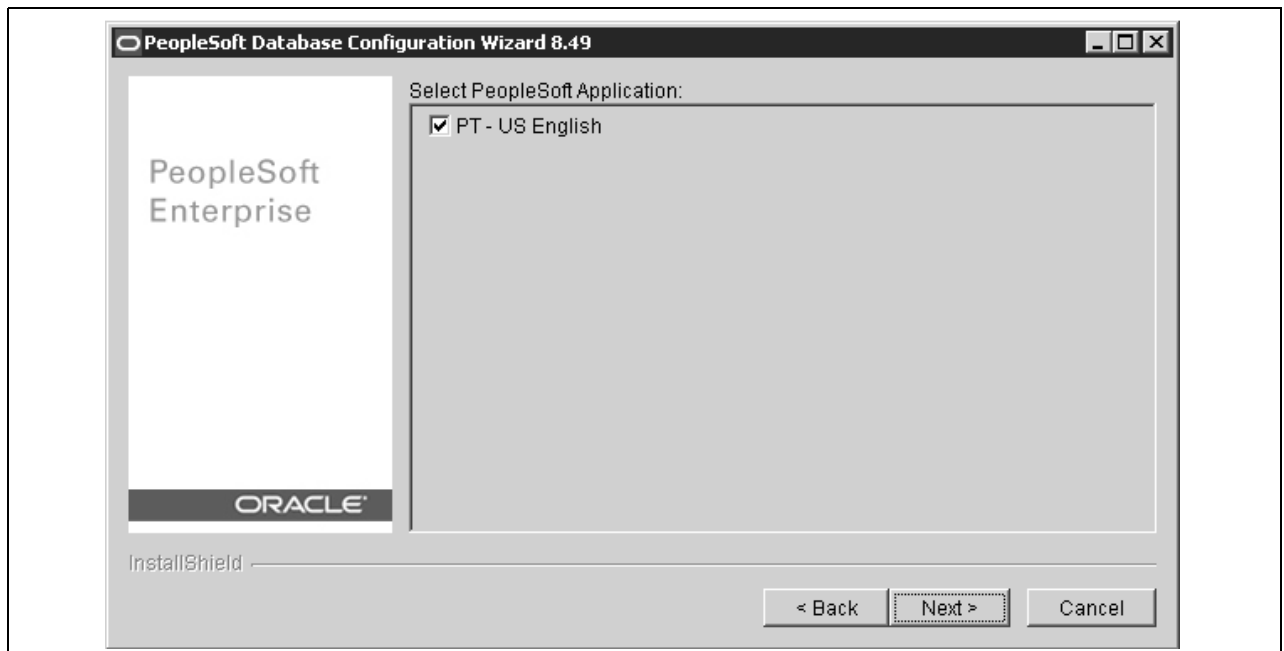
6. If you select Unicode, just select the database type.
7. Click Next.
8. Select which PeopleSoft application database to load and click Next.

(The available selections will depend upon which application CDs you have licensed and installed.)

If you installed the Multilanguage CD, each application will be listed several times, once for each language. If you are installing languages other than English, make sure to select the appropriate language data files for each application you select in English. This will load the translated database objects.

See “Preparing for Installation,” Planning Multilingual Strategy.

If you are installing an application in any language other than English, you must also select the English component of the application. For example, for HRMS if you select HR-French, you must also select HR-English. This ensures that you install the necessary base-language components.



Choosing the application database on the Database configuration wizard

9. Specify the path to your connectivity binaries, and click Next.
10. If this is your first time installing the application, select Configure a server and create a database and click Next.

Otherwise, select Create database on existing server.

11. A message will confirm your selection.

If this is the first time you are installing a PeopleSoft database on this server, the Database Configuration Wizard will shut down and restart Microsoft SQL Server to allow some configuration changes to take effect. User-defined data types will be added to your server as well. Click Next to continue.

12. Enter the appropriate server information for your database, clicking Next when you are done.

Server/Instance Name	The SQL Server name (default or named instance) of the server you are using to install the application. This is the server that will host your database. You can use the name of a default instance or a named instance. Default instances only require the name of the SQL Server server. A named instance entry requires more details. Here is an example of a named instance entry: <i>SERVER1\DEVLP</i>, where “SERVER1” is the name of the SQL Server server and “DEVLP” is the named instance name.
PeopleSoft Database Name	The name for your database. (This is the database defined in chapter 1 under “Planning Database Creation.”) The name must be uppercase and can have no more than eight characters.
Logical name of the data device	A name assigned to identify the physical device that allocates the database data.
Microsoft SQL Server Data File Size	The initial physical size in megabytes of the file that will host your database data.
Logical name of the log device	A name that identifies the physical device that allocates your database log.

Microsoft SQL Server Log File Size	This value specifies the initial amount of space in megabytes assigned to your database log.
Auto Extend “ON”	Selecting this option causes the size of the necessary devices to create the database to grow automatically. This is the preferred option. Note. This option applies only to SQL Server 2000 database servers. For SQL Server 2005 servers the database datafiles will be created with no growth restriction by default.
Auto Extend “OFF”	Selecting this option limits the amount of space that your data and log device may use to the amount of space you specify on the previous options. Note. This option applies only to SQL Server 2000 database servers. For SQL Server 2005 servers the database datafiles will be created with no growth restriction by default.

13. Specify the values for the various required IDs:

PeopleSoft symbolic ID	Accept the default value provided or use the same value as the access ID. This value will be used internally by your PeopleSoft application.
Access ID	This is the PeopleSoft access ID defined in chapter 1 under “Planning Database Creation.” This value is case sensitive. You will use it later in this chapter to sign on to Data Mover in “bootstrap mode.” Note. Do not use <i>sa</i> as an access ID for your PeopleSoft applications. Create a separate login with system administration privileges for this purpose. Note. You must limit the access ID and connect ID to eight characters or less.
Access password	This is the PeopleSoft access ID password. You will use this value later in this chapter to sign on to Data Mover in “bootstrap mode.” If you are using SQL Server 2005 make sure the password complies with the database server OS password requirements policies.
Connect ID	This is the login that will be used for the initial connection to the database. The use of connect ID is now mandatory and is defined through a script named connect.sql which resides at <PS_HOME>\scripts.
Connect password	This is the connect ID password used to authenticate the connect ID. If you are using SQL Server 2005 make sure the password complies with the database server OS password requirements policies. Note. PeopleSoft applications use the connect ID to validate the security permissions of the application user ID during the sign-on process. A connect ID is a database user; each PeopleSoft application has one connect ID and only one is necessary for all the users in one application.

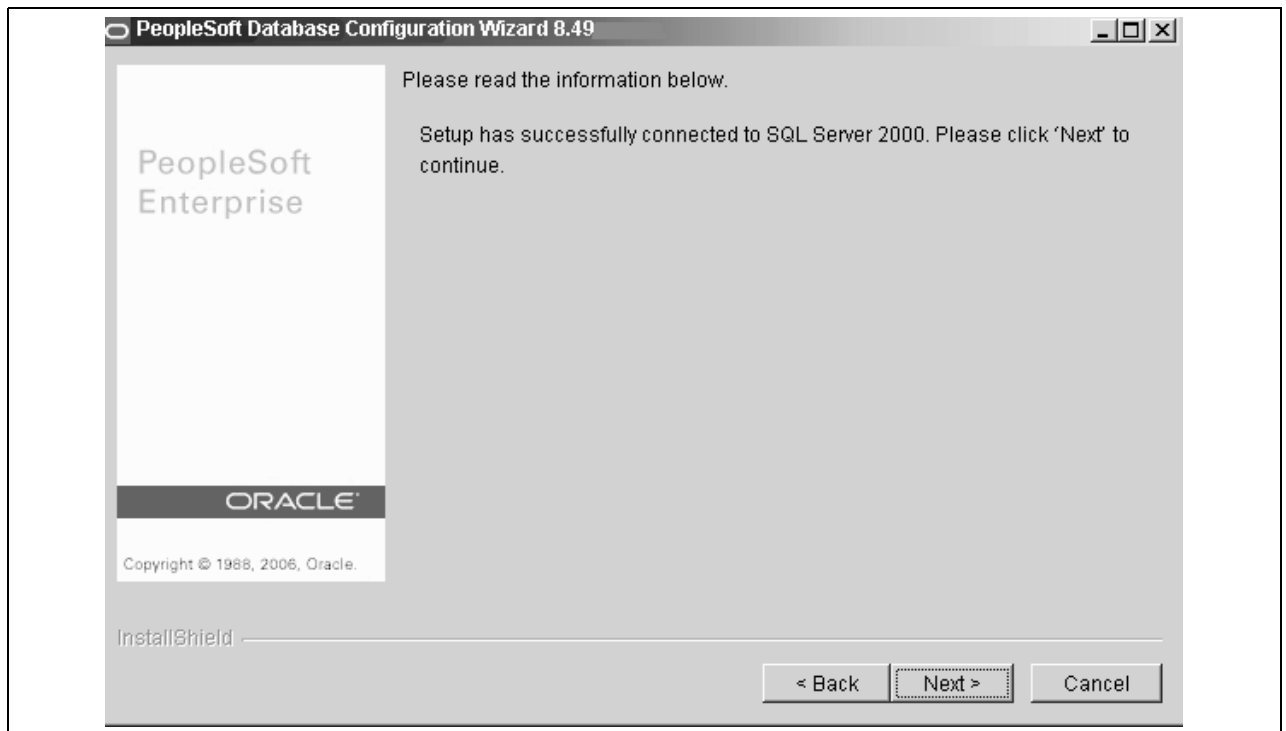
14. Specify file names and directories for these options:

- Microsoft SQL server Data file name.
- Microsoft SQL server Log file name.

15. Review the information on the next window.

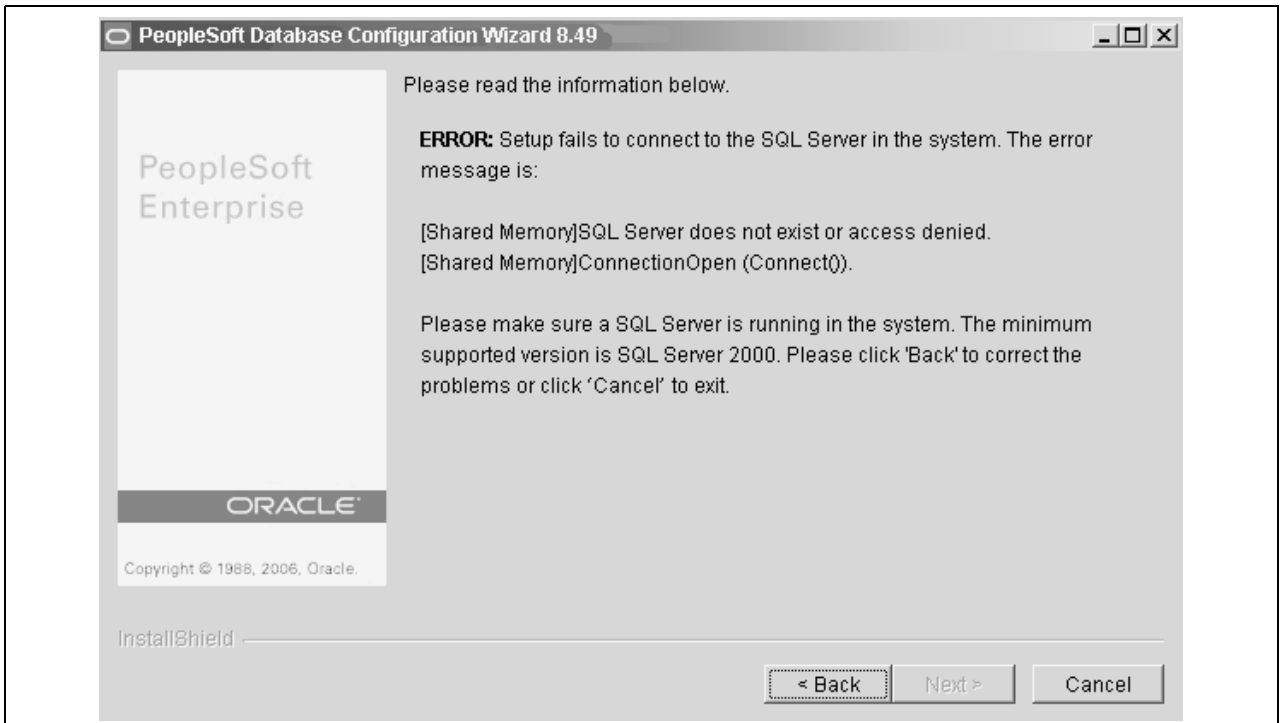
The Database Configuration Wizard tries to connect to your SQL Server database server. The Database Configuration Wizard also determines the database version you are connecting to. A screen shows if you are connecting to a SQL Server 2000 or SQL Server 2005 server.

If the connection is successful you see a screen like the following (please note the information may change depending the SQL Server version you are using):



Successful connection to server

If the wizard cannot connect to the database server you will see a screen showing the following (please note the information may change depending the SQL Server version you are using):



Unsuccessful connection to SQL Server

If you receive this error, make sure the server is up and verify the server name you provided in previous steps.

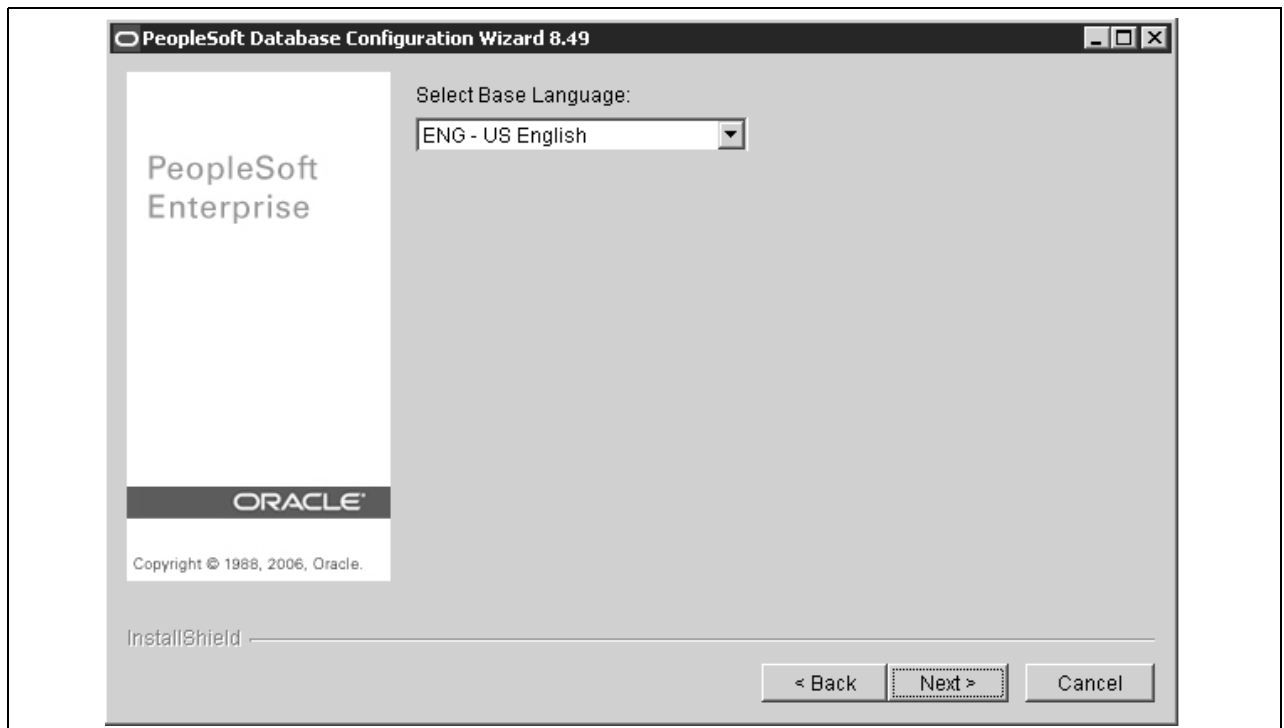
16. Select the base language (the default is US English) and click Next.

The Select base language selection is used to determine what primary base language the customer wants to run their PeopleSoft application on. If you choose a language other than English, the base language will be swapped during the database creation script.

See "Planning for Installation," Planning Multilingual Strategy.

This step applies only if your users will be operating PeopleSoft applications primarily in one particular language other than English. This step gives a performance boost to the language you designate as the base language, but would require more administrative overhead than leaving English as the base language does.

See *Enterprise PeopleTools 8.49 PeopleBook: Global Technology*.



Selecting the base language on the Database Configuration Wizard window

17. At the confirmation dialog box, check the database configuration you selected, and if it is correct, click Next.

If you need to change any settings, click Back.

18. You see various messages indicating that the Database Configuration Wizard is processing your request.

Note. The messages are displayed to indicate real time progress of the Database Configuration Wizard, and are written to log files contained in the <PS_HOME>/log directory.

19. When you see a message that the PeopleSoft Database Configuration has been successfully installed, click Finish.

Task 7-3: Checking the Log Files and Troubleshooting

This section discusses:

- Checking the Log Files
- Troubleshooting

Task 7-3-1: Checking the Log Files

After the Database Configuration Wizard finishes its execution, look for all log output in the <PS_HOME>/log directory. Open all the log files. There is a log file for each of the steps that the Database Configuration Wizard carries out—importing, encrypting passwords, creating triggers, replacing views, and creating temp tables. *None should contain error messages.*

Task 7-3-2: Troubleshooting

If the Database Configuration Wizard did not complete successfully, please read this troubleshooting information. If your script has stopped midway (this can happen for a number of reasons) you need to edit the Data Mover script generated automatically by the Database Configuration Wizard and restart Data Mover manually. The Data Mover script files have the extension .dms and are sometimes referred to as “DMS scripts.”

The generated Data Mover import script is saved in the <PS_HOME>/scripts directory. The script conforms to the following naming convention:

<dbname>mss.dms

To edit and restart the DMS script:

1. Determine the record that was being imported (that is, which IMPORT command was running) when the script stopped.

(See the note below for additional information on determining where the script stopped.)

Note. When building a DMO database or a multilingual database, adding the 'SET START' statement can be tricky because the Data Mover script used to load the database will include more than one IMPORT statement. The key is to view the LOG files and determine which IMPORT section of the script Data Mover failed on. If the failure occurred during the first IMPORT, add the 'SET START' statement before the first 'IMPORT *;' statement. If the failure occurred during a subsequent IMPORT, comment out all statements preceding the 'IMPORT *;' statement where the failure occurred and add the 'SET START' statement before the 'IMPORT *;' statement of the section in which the failure occurred. *This is very important.* If you see any 'unique index constraint' error messages in the 'building required indexes' section, your IMPORT script failed during a subsequent IMPORT but the 'SET START' statement was added to the first IMPORT. In this situation, you can run the Data Mover script in its originally generated form, with only one modification. In the first IMPORT section, change the statement 'IMPORT *;' to 'REPLACE_DATA *;'. This will delete all the data in the tables, and re-import it. This process will take some time to run, and you will need to separately create each of the indexes that failed.

2. Invoke Data Mover outside of the Database Configuration Wizard by selecting Start, Programs, PeopleTools 8.4x, Data Mover (or going to <PS_HOME>\bin\client\winx86 and running psdmt.exe).

The PeopleSoft Logon window appears.

3. Log on using the access ID you specified when you created your Data Mover scripts with the Database Setup program.

This starts Data Mover in *bootstrap mode*.

The input window should display the DMS import script for the database. The script has the format <dbname>mss.dms.

4. If necessary, select File, Open, and browse to the <PS_HOME>/scripts directory to find the appropriate DMS script.
5. Add the following line before the offending IMPORT command (the one being executed when the failure occurred):

```
SET START <RECORD NAME>;
```

where <RECORD NAME> is the name of the record that failed. Make sure to review the Data Mover log file to see where the script failed and locate the last record that imported successfully. The 'SET START' will begin the Data Mover import at the specified record name.

Note. It is a good idea to change the name of the log file in the script before each attempt at running it. This ensures that you have a separate log file for each attempt, if you run the import more than once.

Example:

If the script stops and the table is partially inserted with a message similar to this one:

```
Importing PSPNLFIELD
Rows inserted into PSPNLFIELD
3000
```

First drop the partially inserted table (for example, record) by using the DROP TABLE command, and then restart Data Mover at the record that failed using the SET START command and continue the Data Mover import. With PeopleTools 8.4, this can be done in a single pass.

Add the following lines before the offending 'IMPORT *;' command (the one being executed when the failure occurred):

```
SET START <RECORD NAME>;
DROP TABLE <RECORD NAME>;
```

where <RECORD NAME> is the name of the record that failed. Make sure to review the Data Mover log file to see where the script failed and locate the last record that imported successfully. The 'SET START' will begin the Data Mover import at the specified record name.

Example of the original script:

```
REM - PeopleTools System Database - US English
/
SET LOG ptengs.log;
SET INPUT ptengs.db;
SET COMMIT 30000;
SET NO VIEW;
SET NO SPACE;
SET NO TRACE;
SET UNICODE OFF;
IMPORT *;
```

Example of script after modification, with changes in bold font:

```
REM - PeopleTools System Database - US English
/
SET LOG ptengs2.log;
SET INPUT ptengs.db;
SET COMMIT 30000;
SET NO VIEW;
SET NO SPACE;
SET NO TRACE;
SET UNICODE OFF;
SET START PSPNLFIELD;
DROP TABLE PSPNLFIELD;
IMPORT *;
```

For the DROP Statement, for records with a non-leading PS rename, add PS_ to the beginning of the rename; otherwise the table will not be found.

6. Restart the script (File, Run Script).

Task 7-4: Updating Database to Latest PeopleTools Release

This section discusses:

- Understanding Database Updates
- Cleaning Up Data
- Updating PeopleTools System Tables
- Updating PeopleTools Database Objects
- Updating PeopleTools Multilingual Objects
- Deleting Obsolete PeopleTools Database Objects
- Altering PeopleTools Tables
- Updating PeopleTools System Data
- Running PeopleTools Conversions
- Converting Integration Broker
- Changing the User Interface

Understanding Database Updates

Your PeopleSoft application database may be on a PeopleTools release prior to the version that you are currently running. For you to be able to sign on to your database after running the Data Mover script to load your database, the PeopleTools versions for your database and your file server must match. The steps in this task ensure that your PeopleSoft database is in sync with the PeopleTools version that you are running.

Note. You will use Application Designer for several steps in this portion of the installation. Consult the Application Designer documentation if you have questions.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Application Designer*

Note. If you are installing a PeopleTools System Database or if your database is delivered on PeopleTools 8.49, the delivered database already contains the updated PeopleTools objects. Skip this task and continue with the install at the task “Running Additional Data Mover Scripts.”

Here is a list of applications for which this task must be run because the version of the database that was shipped is different than the version of PeopleTools that you are running. If your application release is earlier than the release listed in the table, you must run this task:

Application Release	Application Database Version	Requires Update to 8.49?
CRM 8.9	8.45	Yes
CRM 9.0	8.48	Yes

Application Release	Application Database Version	Requires Update to 8.49?
ELS 8.8 SP1	8.43	Yes
ELS 9.0	8.47	Yes
EPM 8.9	8.46	Yes
EPM 9.0	8.48	Yes
Fin/SCM 8.9	8.46	Yes
Fin/SCM 9.0	8.48	Yes
HRMS 8.9	8.46	Yes
HRMS 9.0	8.48	Yes
Portal 8.9	8.46	Yes
Portal 9.0	8.48	Yes
RMS 8.9	8.45	Yes
RMS 8.95	8.46	Yes
SIM 8.9	8.45	Yes

Verify your application and PeopleTools release information on Customer Connection. Navigate to Site Index, product releases (roadmaps and schedules), Release Definitions, select your product line, and then select the product you are installing. If the Tools version is not 8.49, you must run this task. Otherwise, continue to the task “Running Additional Data Mover Scripts.”

Task 7-4-1: Cleaning Up Data

If your database is delivered on PeopleTools 8.48 or higher, do *not* run this step, and instead, proceed to Updating PeopleTools System Tables. If your database is delivered on PeopleTools 8.47 or earlier, perform this step to clean out obsolete message data.

Warning! Performing this task when updating from PeopleTools 8.48 or later will wipe out current valid data that is needed for your system to function properly.

Message functionality and structure changed as of PeopleTools 8.48 and the old data is obsolete. Edit <PS_HOME>\scripts\ptupgibdel.sql to delete data from the tables that only exist in the old PeopleTools release. Open the script and make the following modifications, and then run the modified script using your SQL query tool:

1. Search for the string “--- End of PT8.<xx> ---” where <xx> represents the last two digits of the PeopleTools release you are upgrading from.
2. Delete the entire portion of the script below this string.
3. Save the script as <PS_HOME>\scripts\ptupgibdel8<xx>.sql where <xx> represents the last two digits of the PeopleTools release you are upgrading from, as determined in Step 1.

Note. Save the script using the naming convention shown above! This will preserve the original script for use in updating other databases at different PeopleTools releases.

4. Using a SQL query tool, run the ptupgibdel8<xx>.sql script against your PeopleSoft database.

Task 7-4-2: Updating PeopleTools System Tables

Run SQL scripts to update your PeopleTools system tables to the latest PeopleTools release (currently 8.49).

Use a query tool, such as the Query Analyzer, to run SQL scripts while in the PeopleSoft database.

1. Run the appropriate SQL scripts for your application version.

The following scripts are found in the <PS_HOME>\scripts directory.

Use the scripts in the following table for non-Unicode databases:

Application Database Version	Required Scripts for Non-Unicode Databases
8.40	rel841, rel842, rel843, rel844, rel845, rel846, rel847, rel848 and rel849
8.41	rel842, rel843, rel844, rel845, rel846, rel847, rel848 and rel849
8.42	rel843, rel844, rel845, rel846, rel847, rel848 and rel849
8.43	rel844, rel845, rel846, rel847, rel848 and rel849
8.44	rel845, rel846, rel847, rel848 and rel849
8.45	rel846, rel847, rel848 and rel849
8.46	rel847, rel848 and rel849
8.47	rel848 and rel849 Note. If you are installing ELM 9.0, run rel848n and rel849n instead.
8.48	rel849 Note. If you are installing a 9.0 application, run rel849n instead.
8.49	None

Use the scripts in the following table for Unicode databases:

Application Database Version	Required Scripts for Unicode Databases
8.40	rel841u, rel842u, rel843u, rel844u, rel845u, rel846u, rel847u, rel848u, and rel849u

Application Database Version	Required Scripts for Unicode Databases
8.41	rel842u, rel843u, rel844u, rel845u, rel846u, rel847u, rel848u, and rel849u
8.42	rel843u, rel844u, rel845u, rel846u, rel847u, rel848u, and rel849u
8.43	rel844u, rel845u, rel846u, rel847u, rel848u, and rel849u
8.44	rel845u, rel846u, rel847u, rel848u, and rel849u
8.45	rel846u, rel847u, rel848u, rel849u
8.46	rel847u, rel848u, and rel849u
8.47	rel848u and rel849u Note. If you are installing ELM 9.0, run rel848un and rel849un instead.
8.48	rel849u Note. If you are installing a 9.0 application, run rel849un instead.
8.49	None

2. If the application database version you are installing is either 8.42 or 8.43, run the following SQL command:

```
DROP TABLE PS_PSMCFQUEUESLANG
```

Note. PS_PSMCFQUEUESLANG may not exist in some 8.43 application databases. Do *not* drop the table PSMCFQUEUESLANG.

3. If the application database you are installing is 8.45 or lower, run the following SQL command:

```
DROP TABLE PSOPTSTATUS
```

4. Edit and run the grant.sql script in the <PS_HOME>\scripts directory. This will grant permissions to the Connect ID.
5. Invoke Data Mover by running <PS_HOME>\bin\client\winx86\psdmt.exe.
The PeopleSoft Logon window appears.
Log on using a valid PeopleSoft Operator ID, such as PS for HRMS or VP1 for FDM.
6. Run the storedl.dms Data Mover script in the <PS_HOME>\scripts directory.

Note. Comment the other platform-specific scripts according to your platform

This will update your platform-specific DDL model statements.

Log out of Data Mover for the next step.

7. Invoke Data Mover by running `<PS_HOME>\bin\client\winx86\psdmt.exe`.

The PeopleSoft Logon window appears.

Log on using the access ID you specified when you created your Data Mover scripts with the Database Setup program.

This will start Data Mover in bootstrap mode.

8. Run the `msgtlsg.dms` Data Mover script in the `<PS_HOME>\scripts` directory.

This will update the PeopleTools messages in your database.

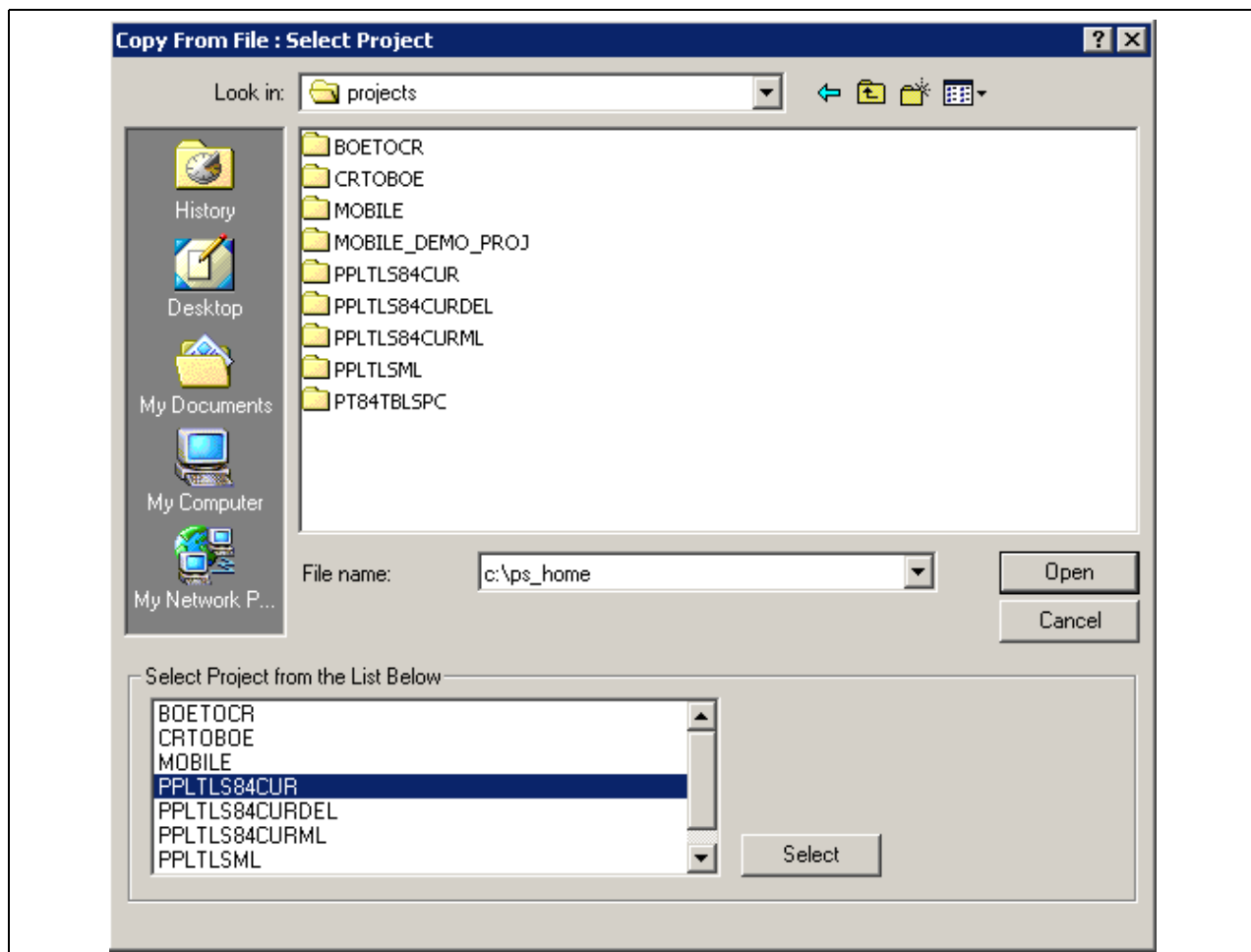
Task 7-4-3: Updating PeopleTools Database Objects

To update PeopleTools database objects to the current release you must be in Application Designer. The Copy from File functionality lets you update your PeopleTools database objects from a file. You must perform this step to bring the database objects in sync with the PeopleTools release. Failure to run this step will introduce problems to your environment.

To update PeopleTools database objects:

1. Launch Application Designer and sign on to your database with a valid PeopleSoft user ID.
2. Select Tools, Copy Project, From File.
3. In the resulting dialog box, change the import directory to `<PS_HOME>\projects`, select `PPLTLS84CUR` from the list of projects and click the Select button.

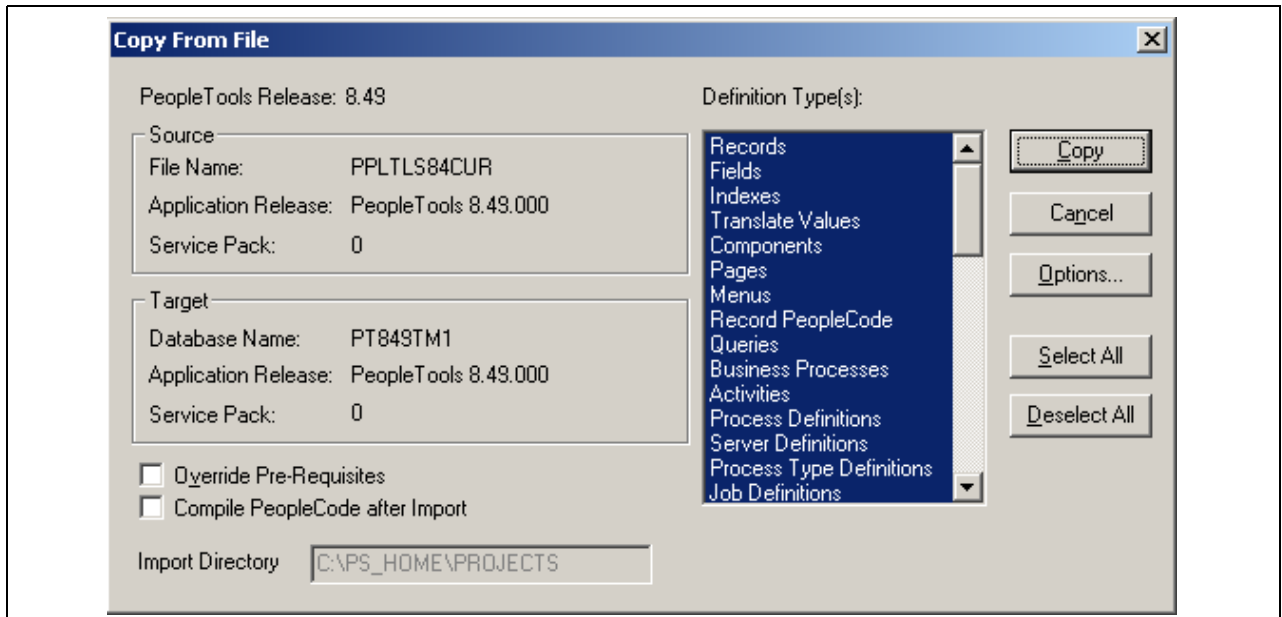
Note. If the project already exists on the database, a confirmation dialog box appears asking if you want to overwrite the existing project. Select the File radio button and click OK to overwrite the existing project.



Selecting PPLTLS84CUR in the Copy From File dialog box

4. The Copy From File dialog box appears.

Select all object types and then click the Copy button. When the progress window disappears, the project has been copied.



The Copy From File dialog box showing that PPLTLS84CUR will be copied

If you see the following types of messages in the output window do not worry; they are acceptable because the field label properties were copied with the object definition:

- Definition Name: OPERPSWD.OPERPSWD not copied, entire definition already copied (62,32).
- Definition Name: OPRID.NEW not copied, entire definition already copied (62,32).

Task 7-4-4: Updating PeopleTools Multilingual Objects

If you are currently updating a PeopleSoft Multilingual Database, you must also apply the project PPLTLS84CURML, which contains the translations of the PeopleTools Objects.

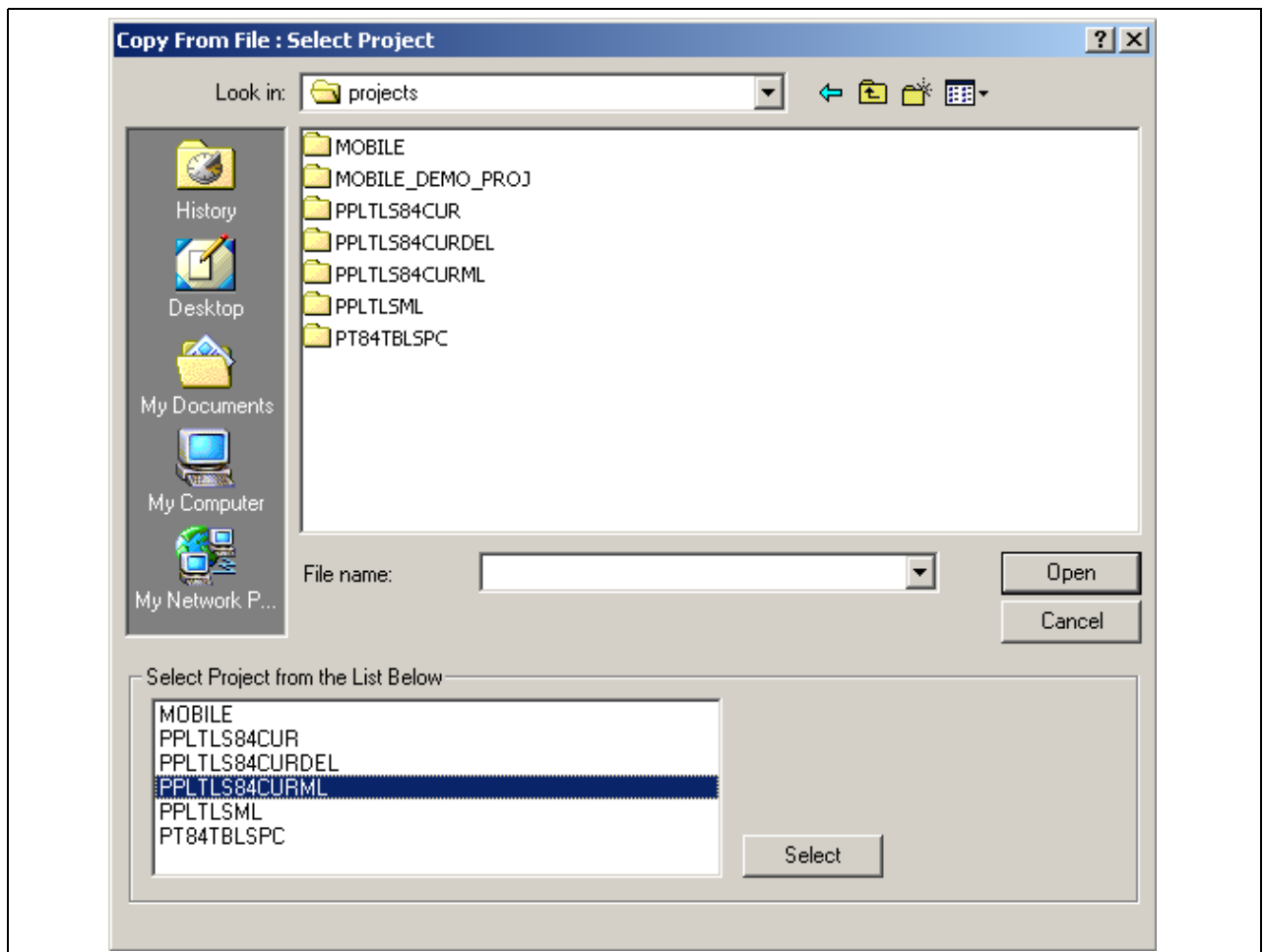
Note. If you have licensed and installed French into this database, copy the PPLTLSML project instead of the PPLTLS84CURML project for French *only*. Substitute the project name PPLTLSML instead of PPLTLS84CURML in the instructions below. Copy the PPLTLS84CURML project to update any non-French languages that are installed in the database.

To update PeopleTools database objects to the current release you must be in Application Designer. The Copy from File functionality lets you update your PeopleTools database objects from a file.

To apply the translation project for PeopleTools 8.49:

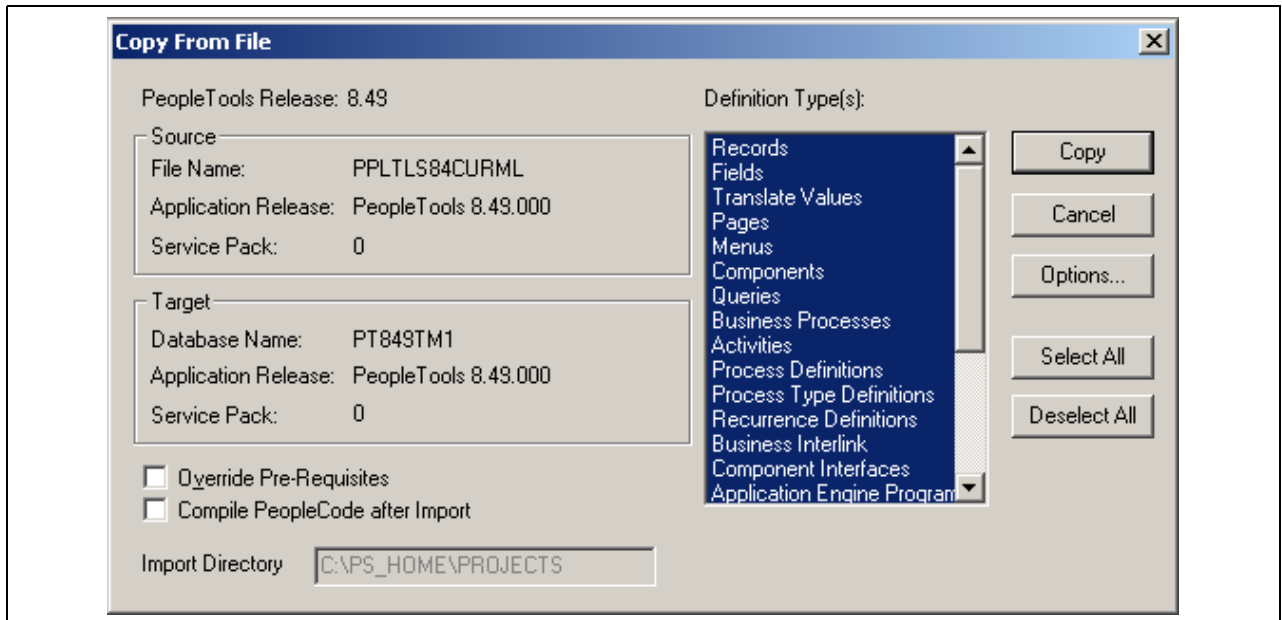
1. Bring up the Configuration Manager and select the Display tab.
Ensure that the language matches the base language of your database. Always run upgrade copy as a base language user.
2. Launch Application Designer and sign on to your database with a valid PeopleSoft user ID.
3. Select Tools, Copy Project, From File.
4. In the resulting dialog box, change the import directory to <PS_HOME>\projects.
5. Select PPLTLS84CURML from the list of projects and click the Select button.

Note. If the project already exists on the database, a confirmation dialog box appears asking if you want to overwrite the existing project. Select the File radio button and click OK to overwrite the existing project.



Selecting PPLTLS84CURML in the Copy From File dialog box

6. The Upgrade Copy dialog box appears.
Make sure that all object types are selected.
7. Click the Options button, select the Copy Options tab, and ensure that only the non-English languages you have installed are selected.
Please note that English and Common should *not* be selected.
8. Select the languages that you are currently installing from the Copy Options dialog box.
9. Click the Copy button.



The Copy From File dialog box showing that PPLTLS84CURML will be copied

When the progress dialog box disappears, the project has been copied.

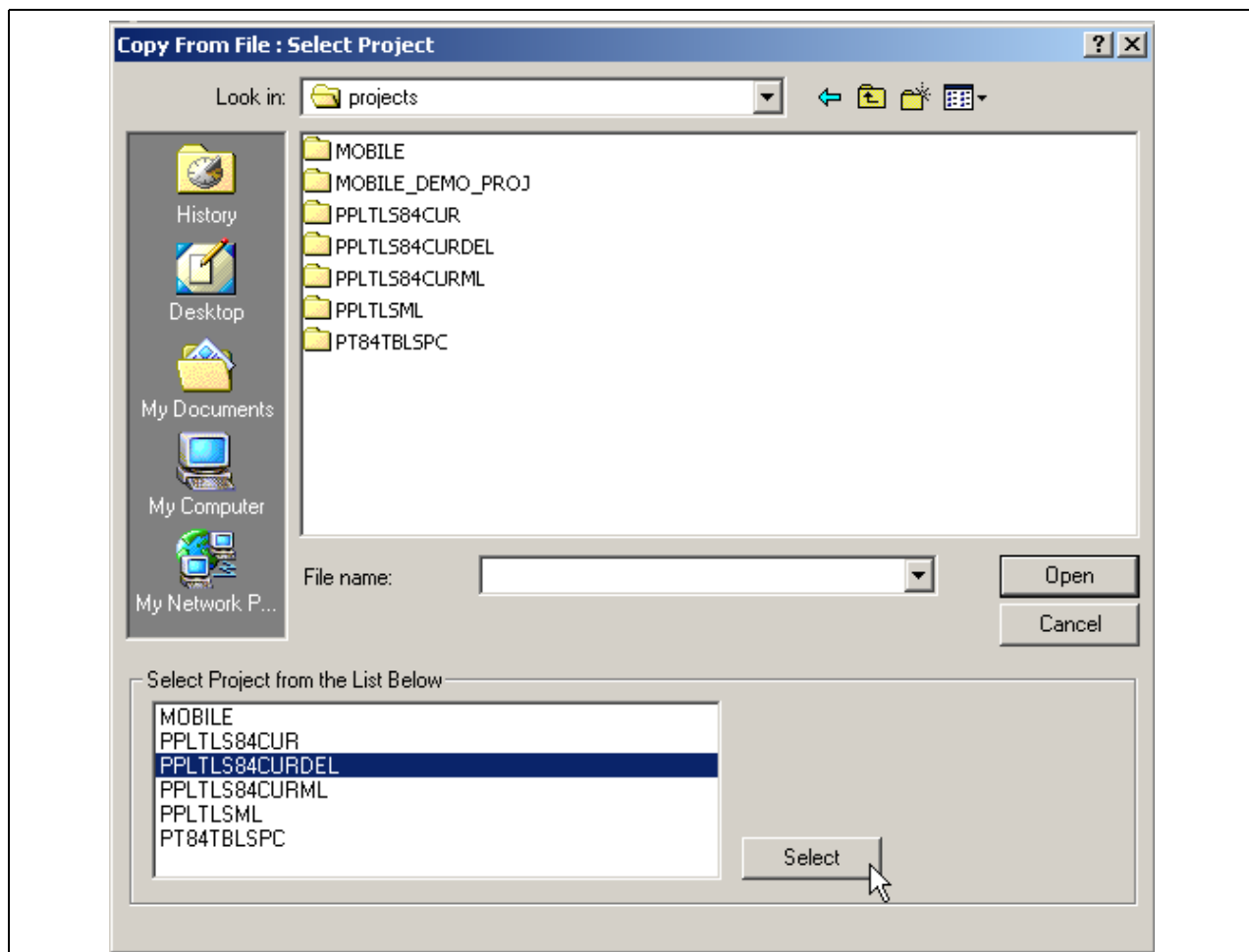
Task 7-4-5: Deleting Obsolete PeopleTools Database Objects

This process removes obsolete PeopleTools objects from your database. To update PeopleTools database objects to the current release you must be in Application Designer. You will use the Copy from File functionality to delete the obsolete objects from the database.

To delete obsolete PeopleTools database objects:

1. Launch Application Designer and sign on to your database with a valid PeopleSoft user ID.
2. Select Tools, Copy Project, From File.
3. In the resulting dialog box, change the import directory to <PS_HOME>\projects, select PPLTLS84CURDEL from the list of projects and click Select.

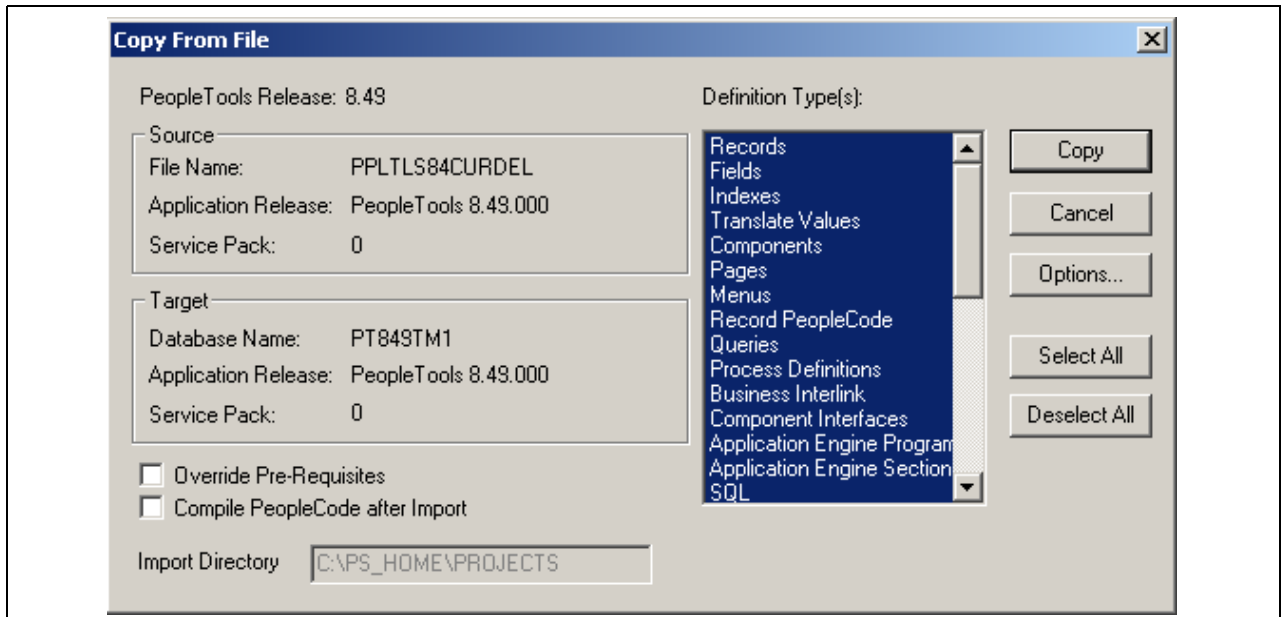
Note. If the project already exists on the database, a confirmation dialog box appears asking if you want to overwrite the existing project. Select the File radio button and click OK to overwrite the existing project.



Selecting PPLTLS84CURDEL in the Copy From File dialog box

4. The Copy From File dialog box appears.

Select all object types and click the Copy button. When the progress dialog box disappears, the project has been copied.



The Copy From File dialog box showing that PPLTLS84CURDEL will be copied

Note. If you are applying a required for install PeopleTools patch *and if a database project is included*, apply the database projects now. Make sure to read the patch release notes to find out if database changes are in the patch.

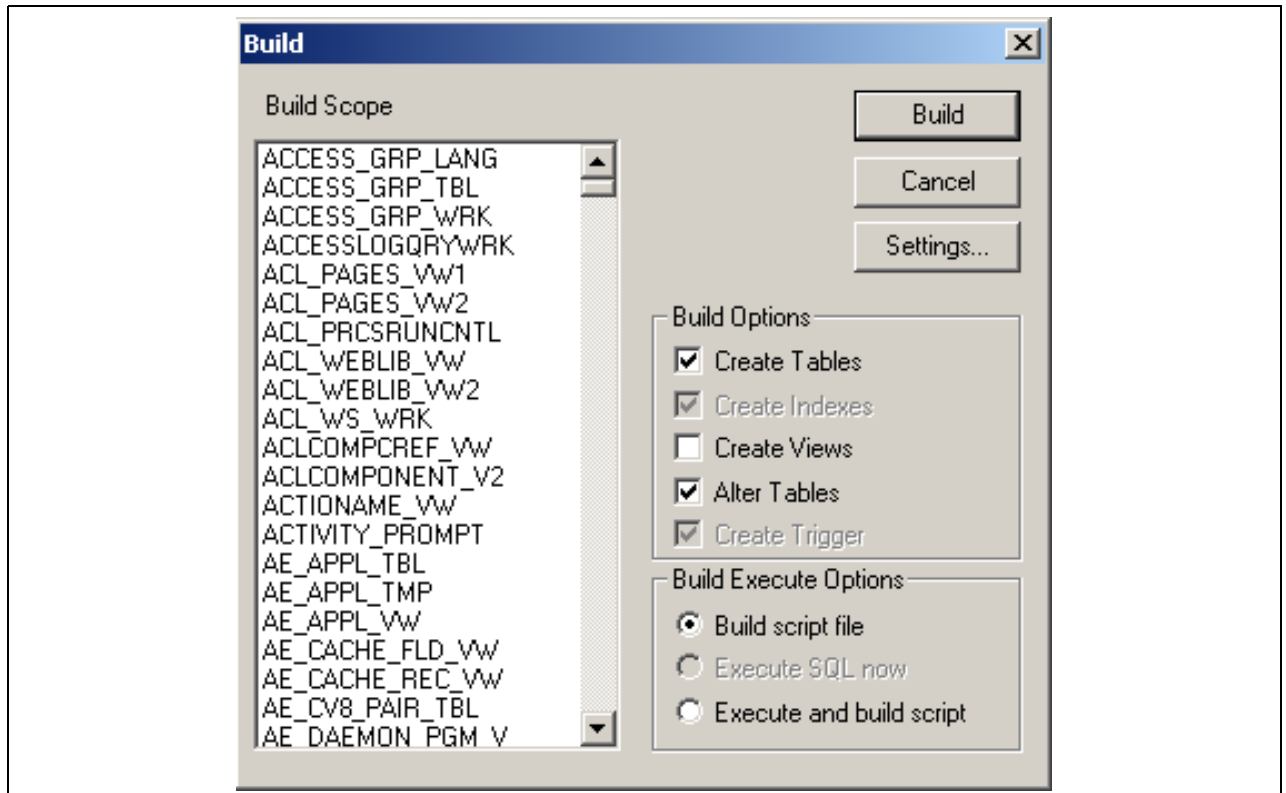
Task 7-4-6: Altering PeopleTools Tables

ALTER AUDIT is an online utility used to check whether the PeopleTools tables are synchronized with the underlying SQL data tables in your database. This process compares the data structures of your database tables with the PeopleTools tables to uncover inconsistencies. ALTER AUDIT then reports its findings. In this release, we expect to see differences between the database structure and the tools tables. You will generate and run a SQL script to synchronize the PeopleTools table definitions with the underlying tables in your database.

To alter PeopleTools tables:

1. Launch PeopleTools and sign on to the installed database.
2. From the Application Designer, select File, Open.
3. Select *Project*, enter *PPLTLS84CUR* in the name dialog box, and click OK.
4. Select Build, Project.

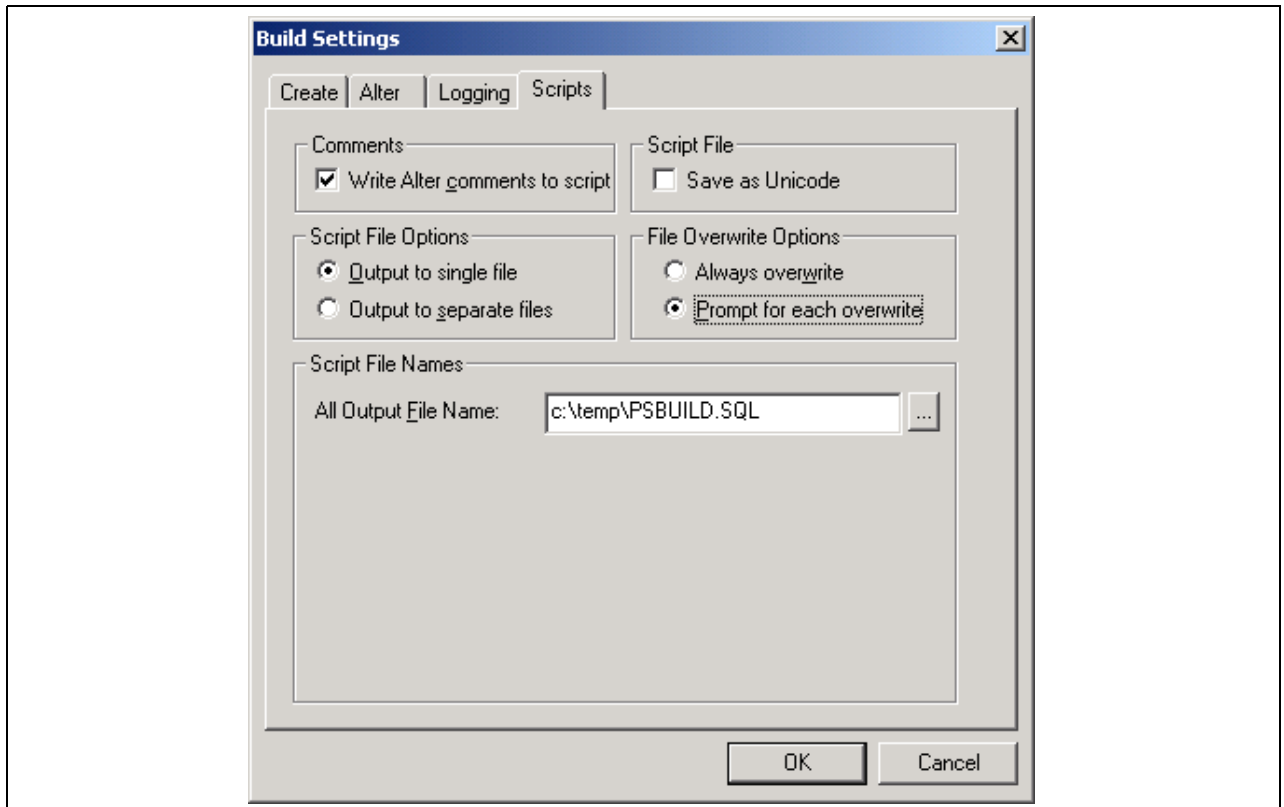
The Build dialog box appears:



The Build dialog box

5. Select Create Tables and Alter Tables in the Build Options region (Create Indexes and Create Trigger will automatically be selected).
6. Select Build script file in the Build Execute Options region.
7. Click Settings.

The Build Settings dialog box appears:

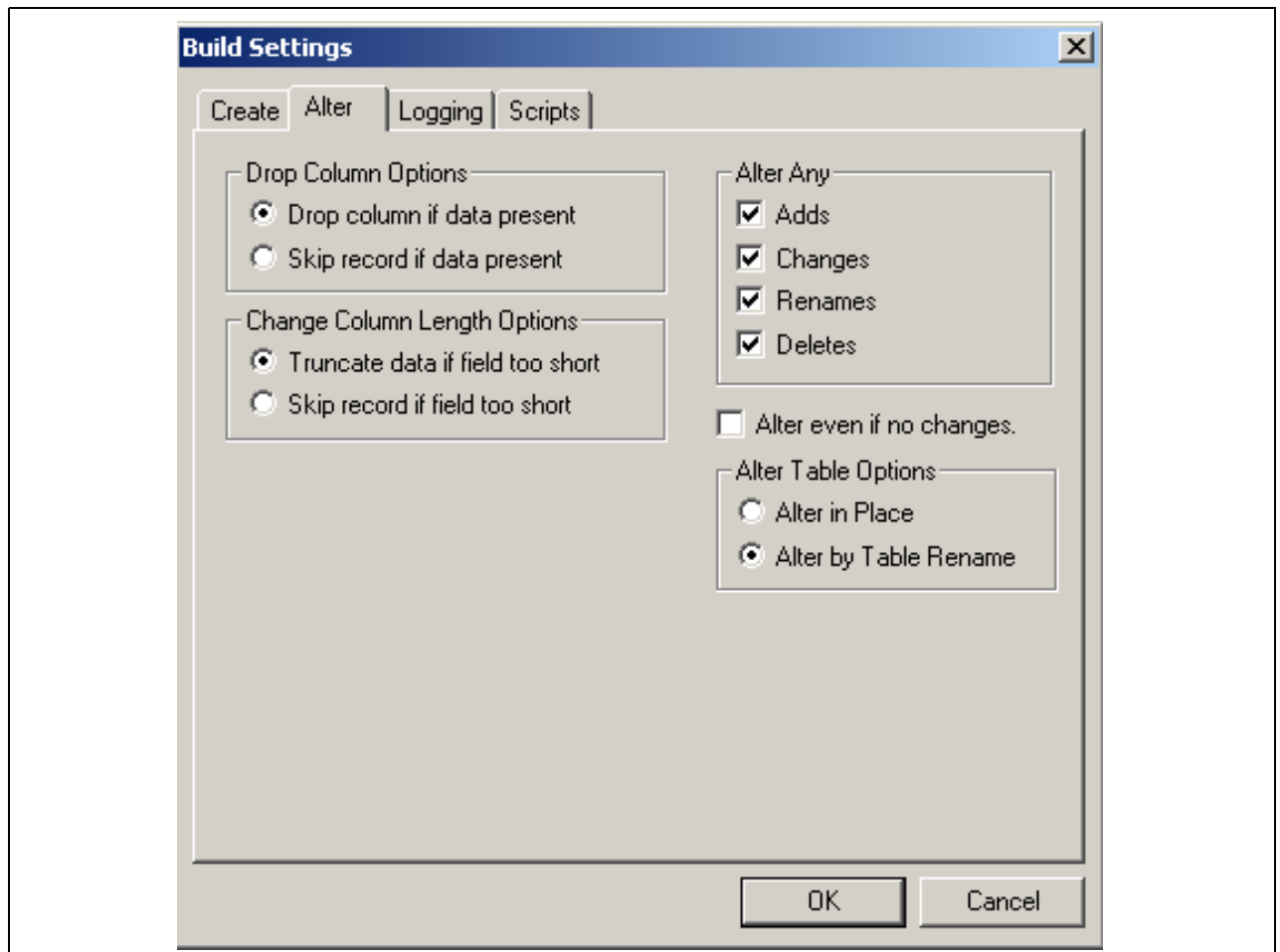


Build Settings dialog box: Scripts tab

8. Select the Scripts tab.
9. Select Write Alter comments to script.
10. Select the Alter tab and ensure that the Adds, Changes, Renames, and Deletes check boxes are selected in the Alter Any region.

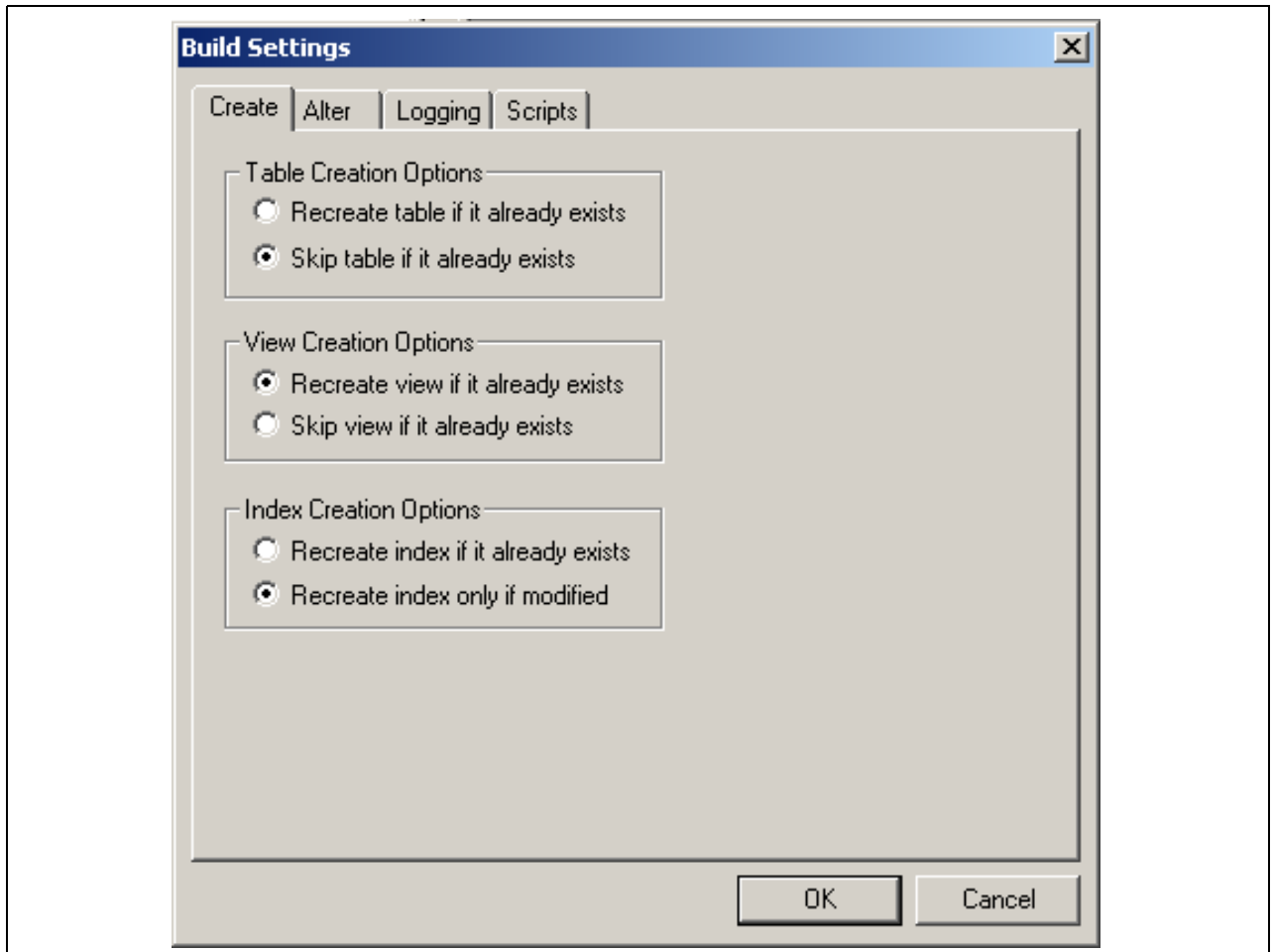
Drop column if data present should be selected in the Drop Column Options region, and Truncate data if field too short should be selected in the Change Column Length Options region.

Make sure that the option Alter by Table Rename is selected in the Alter Table Options region.



Build Settings dialog box: Alter tab

11. Select the Create tab and ensure that the Skip table if it already exists, Recreate view if it already exists, and Recreate index only if modified options are selected.



Build Settings dialog box: Create tab

12. Click OK.

The Build dialog box reappears.

13. Click Build.

14. Click Close when the process is completed.

15. Run the generated SQL script in your platform-specific query tool to bring your database structure in sync with the PeopleTools tables.

Task 7-4-7: Updating PeopleTools System Data

Data Mover scripts that update PeopleTools system data are run to enable new features and load new messages for the PeopleTools 8.49 release. Several of the scripts that you need to run are dependent upon the version of the application you are running.

See Understanding Database Updates.

To update PeopleTools system data:

1. Invoke Data Mover by running `<PS_HOME>\bin\client\winx86\psdmt.exe`.

The PeopleSoft Logon window appears.

2. Log on using the access ID you specified when you created your Data Mover scripts with the Database Setup program.

This will start Data Mover in bootstrap mode.

3. Run the appropriate Data Mover scripts for your application database version.

The application database version refers to the version before you started this step. Be sure to run the scripts in the order listed. The scripts are found in the <PS_HOME>\scripts directory:

Application Database Version	Scripts to Run
8.40	pt841tls, pt842tls, pt843tls, pt844tls, pt845tls, pt846tls, pt847tls, pt848tls and pt849tls
8.41	pt842tls, pt843tls, pt844tls, pt845tls, pt846tls, pt847tls, pt848tls and pt849tls
8.42	pt843tls, pt844tls, pt845tls, pt846tls, pt847tls, pt848tls and pt849tls
8.43	pt844tls, pt845tls, pt846tls, pt847tls, pt848tls and pt849tls
8.44	pt845tls, pt846tls, pt847tls, pt848tls and pt849tls
8.45	pt846tls, pt847tls, pt848tls and pt849tls
8.46	pt847tls, pt848tls and pt849tls
8.47	pt848tls and pt849tls
8.48	pt849tls
8.49	None

4. Run the pslanguages.dms Data Mover script in the <PS_HOME>\scripts directory.

This script loads language-specific seed data.

5. Run the tlsupgnoncomp.dms Data Mover script in the <PS_HOME>\scripts directory.

This will import the updated PeopleTools Trees, Roles, and Access Groups into your database.

6. If you are a Multilingual customer, from the Data Mover script that was created for your PeopleSoft database installation, find the UPDATE to PSLANGUAGES.

The statement should look similar to the following:

```
UPDATE PSLANGUAGES SET INSTALLED=1 WHERE LANGUAGE_CD = 'xxx';
```

where xxx is one of the PeopleSoft three-letter language code identifiers, as described earlier.

See “Preparing for Installation,” Planning Multilingual Strategy.

Run the SQL command identified above using your SQL tool.

7. Open Data Mover using a valid PeopleSoft Operator ID, such as PS for HRMS or VP1 for FDM.
8. If you are a Multilingual customer and have licensed non-English languages, run the pt849tlsxxx.dms scripts in the <PS_HOME>\scripts directory.

This will update the language-specific PeopleTools system data in your database.

Note. The portion of the script name *xxx* is equivalent to the language code (that is, FRA, CFR, GER, JPN, and so on) of the non-English languages you have installed. There will be a Data Mover script for each non-English language.

9. Run the msgtleng.dms Data Mover Script in the <PS_HOME>\scripts directory.
Non-English message data was loaded in the pt849tlsx.dms scripts. This will update the messages in your database.
10. Run the ptstreng.dms Data Mover script in the <PS_HOME>\scripts directory.
Non-English system data was loaded in the pt849tlsx.dms scripts. This will update the SQR strings in your database.
11. Run the storept.dms Data Mover script in the <PS_HOME>\src\cbl\base directory.
This will update your PeopleTools COBOL stored statements.
12. Run the ptdefnsec.dms Data Mover script in the <PS_HOME>\scripts directory.
This will update the PeopleTools Definition Security group.
13. Run the createvw.dms Data Mover script in the <PS_HOME>\scripts directory.
This will recreate all the views in your database.

Task 7-4-8: Running PeopleTools Conversions

This section discusses:

- Convert Portal Objects
- Convert Query Headings
- Convert Setup Manager
- Convert Navigation Collection and Pagelet Wizard Data
- Convert Additional Pagelet Wizard Data

Convert Portal Objects

The Application Engine program UPG844PORTAL splits PSPRSMDEFN.PORTAL_URLTEXT into segments. This is performed for PeopleSoft Components URLs to extract Menu, Component, and Market information. Record, Field, Event, and Function Names are extracted from Iscript URLs. This program must be run by a PeopleSoft user with the Portal Administrator or PeopleSoft Administrator role. The following SQL will identify which users have the PeopleSoft Administrator or Portal Administrator roles:

```
select ROLEUSER, ROLENAME from PSROLEUSER where ROLENAME in ('PeopleSoft⇒
Administrator','Portal Administrator')
```

Run the UPG844PORTAL Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <oprid> -CP <pswd> -⇒
⇒
⇒
⇒
```



```
⇒
⇒
R INSTALL -AI UPG844PORTAL
```

Use the values for the database name and user ID that you entered on the startup tab of the Configuration Manager for <dbname> and <oprid>, respectively. However, be aware that <pswd> is not the same as the connect password that you entered on the Configuration Manager startup tab. Enter a value for <pswd> that is the password you want to be associated with the <oprid>.

See “Setting Up the Install Workstation.”

See Running the Database Configuration Wizard.

You may see some of the following errors when running this Application Engine program:

- **Not authorized CRef: <Portal Object Name> (95,5032).**

This means that you do not have proper privileges to run this conversion. The user ID that you are using to run this conversion needs to have Portal Administrator permissions.

- **Security synchronization failed for Portal Object: <Portal Object Name> (96,61).**

This is not a fatal error. It may be caused by a content reference that contains invalid URL text and indicates that there was an internal error writing to the security table. The invalid URL text may be pointing to a component or script that does not exist in the database. If you receive this error, please check PeopleSoft Customer Connection for Required at Install patches for your application and apply the patches after installing your database.

- **Cref <Portal Object Name> points to Menu: <Menu Name>, Component <Component Name> which doesn't exist. (96,80).**

The content reference is pointing to an invalid Menu/Component combination. If you receive this error, please check PeopleSoft Customer Connection for Required at Install patches for your application and apply the patches after installing your database.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.

Convert Query Headings

Crystal 9 when run through Process Scheduler will not handle queries with two or more prompts that have the same heading. These duplicates are also not legal in Query. Any old queries that have this condition need to be altered to work with Crystal. This Application Engine program searches for duplicate prompt headings in the table PSQRYBIND and appends numbers onto the text. For example "Item ID" would become "Item ID 2".

Run the UPGQRYDUPHED Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <oprid> -CP <pswd> -⇒
⇒
⇒
⇒
⇒
⇒
R INSTALL -AI UPGQRYDUPHED
```

Note. If a duplicate heading is found that will exceed the length of the field HEADING, the heading will need to be manually changed. The following error will be written to the log file in these cases :

The prompt heading <HEADING> for Query <QUERY> is duplicated.
Please manually correct. (108, 1108)

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Query*.

Convert Setup Manager

The application engine program UPGPTSMDAT upgrades Setup Manager Version 1 (shipped with Fin SCM 8.8, CRM 8.9, and with HCM 8.9) to Setup Manager Version 2 (shipped with PeopleTools 8.46 and above). The program moves all data from Setup Manager Version 1 tables to Version 2 tables.

The application engine program was designed so that it can be run in any database, and can be rerun in the same database. In either case, it will determine if there is data to convert and run as appropriate. For detailed information, see comments attached to the Steps and Actions in this Application Engine Program within Application Designer. This program must be run by a PeopleSoft User with PeopleSoft Administrator role.

Run the UPGPTSMDAT Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <oprid> -CP <pswd> -=>
=>
=>
=>
=>
=>
=>
R INSTALL -AI UPGPTSMDAT
```

Convert Navigation Collection and Pagelet Wizard Data

The application engine program UPGPT846PP adds Navigation Collection and Pagelet Wizard data from the Common Components and Enterprise Portal storage tables into PeopleTools tables.

The application engine program performs the following conversions:

1. Moves data from Common Components tables to PeopleTools tables.
2. Moves data from Enterprise Portal tables to PeopleTools tables.
3. Updates the registry definitions to enable displaying Navigation pages.
4. Adds, updates, and deletes the Navigation Collections folders and content references in the portal registry to the new structures.
5. Converts Pagelet Wizard definitions to the PeopleTools Pagelet Wizard version.
6. Renames Navigation Collection and Pagelet Wizard portal registry attributes to the PeopleTools attribute names.

This program must be run by a PeopleSoft user with the Portal Administrator or PeopleSoft Administrator role.

Run the UPGPT846PP Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <oprid> -CP <pswd>=>
```

```
-R INSTALL -AI UPGPT846PP
```

You may see the following error when running this Application Engine program:

```
You are not authorized for the <objecttype>...
```

This means that you do not have proper privileges to run this conversion. The user ID that you are using to run this conversion needs to have Portal Administrator permissions.

You can ignore any other errors encountered on PeopleSoft delivered objects at this time. Check PeopleSoft Customer Connection for Required at Install patches for your application and apply the patches after installing your database. You can safely rerun UPGPT846PP to check for any remaining errors after applying patches.

Convert Additional Pagelet Wizard Data

The application engine program UPGPT848PP adds the following Pagelet Wizard data sources from Enterprise Portal to PeopleTools: IB Connector, Integration Broker, SOAP, and URL. In addition, the application program transforms the WSRP Portlets created in PeopleTools 8.46 or 8.47 versions of Pagelet Wizard. The process includes the following:

- Move data from Enterprise Portal tables to PeopleTools tables.
- Convert WSRP Portlets created by Pagelet Wizard to the new version.

This program must be run by a PeopleSoft user with the Portal Administrator or PeopleSoft Administrator role.

Run the UPGPT848PP Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <oprid> -CP <pswd> -=>
=>
=>
=>
=>
=>
R INSTALL -AI UPGPT848PP
```

You may see the following error when running this Application Engine program:

```
You are not authorized for the <objecttype>...
```

This means that you do not have proper privileges to run this conversion. The user ID that you are using to run this conversion needs to have Portal Administrator permissions.

You can ignore any other errors encountered on PeopleSoft delivered objects at this time. Check PeopleSoft Customer Connection for Required at Install patches for your application and apply the patches after installing your database. You can safely rerun UPGPT848PP to check for any remaining errors after applying patches.

Task 7-4-9: Converting Integration Broker

This section discusses:

- Updating Integration Broker Defaults
- Creating Integration Broker Objects
- Saving Application Messaging Objects
- Exporting Node Transactions

- Deleting Application Messaging Objects
- Deleting Node Transactions

If your database is delivered with PeopleTools 8.48 or higher, do *not* run this task since the database is already delivered with the new Integration Broker objects as of PeopleTools 8.48. Instead, proceed to Changing the User Interface.

Updating Integration Broker Defaults

User-level node security and transactional security have been added as of PeopleTools 8.48. Service namespace information, a low-level user on the node, and a low-level permission list for service operations, need to be specified. Edit <PS_HOME>\scripts\ptibupgrade.dms and make the necessary modifications as documented in the script. Consult with your Integration Broker specialist for assistance.

Open Data Mover using a valid PeopleSoft Operator ID and run this script.

Creating Integration Broker Objects

The application engine program UPGPT848IBUG converts Application Package metadata into Integration Broker metadata. It also creates the projects PTUPGIBCLONE and PTUPGIBDELETE, and the script ptupg_trx.dms.

Note. Conversion errors in the Application Engine log file will be resolved by applying application-specific Required for Install patches.

Run the UPGPT848IBUG Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <oprid> -CP <pswd> -=>
=>
=>
=>
=>
=>
=>
R INSTALL -AI UPGPT848IBUG
```

Saving Application Messaging Objects

The PTUPGIBCLONE project was created by the UPGPT848IBUG Application Engine program and contains objects that were successfully converted. Copy this project to a directory of your choice where it will not be overwritten. The objects are copied to file as a precautionary measure since you will delete them from the database in a subsequent step.

To save Application Messaging Objects:

1. Launch Application Designer and sign on to your database with a valid PeopleSoft user ID.
2. From the Application Designer, select File, Open.
3. Select Project, enter *PTUPGIBCLONE* in the name dialog box, and click OK.
4. Select Tools, Copy Project, To File.
5. In the resulting dialog box, change the export directory to one of your choice, and click Copy.

When the progress dialog box disappears, the project has been copied to the specified location.

Exporting Node Transactions

Open Data Mover using a valid PeopleSoft Operator ID and run the script <PS_HOME>\scripts\ptupg_trx_export.dms to save the old pre-conversion node transaction data.

Deleting Application Messaging Objects

Delete the obsolete pre-conversion object definitions from the database by first copying the PTUPGIBDELETE project to file, and then copying the same project from file. This project was created by the UPGPT848IBUG Application Engine program and contains the same objects as PTUPGIBCLONE.

To delete Application Messaging Objects:

1. Launch Application Designer and sign on to your database with a valid PeopleSoft user ID.
2. From the Application Designer, select File, Open.
3. Select Project, enter *PTUPGIBDELETE* in the name dialog box, and click OK.
4. Select Tools, Copy Project, To File.
5. In the resulting dialog box, change the export directory to the same one you used for PTUPGIBCLONE, and click Copy.

When the progress dialog box disappears, the project has been copied to the specified location.

6. Select Tools, Copy Project, From File.
7. In the resulting dialog box, change the import directory to the previously specified directory, select PTUPGIBDELETE from the list of projects, and click Select.

Note. Because the project already exists on the database, a confirmation dialog box appears asking if you want to overwrite the existing project. Select the File radio button and click OK to overwrite the existing project.

8. Select all object types and click the Copy button.

When the progress dialog box disappears, the project has been copied. The actions in the project are set to Delete, so this will delete the obsolete pre-conversion object definitions from the database.

Deleting Node Transactions

The script ptupg_trx.dms is generated by the UPGPT848IBUG Application Engine program. This script can be found in the location specified in the OUTPUT variable set in Configuration Manager.

To view the OUTPUT variable:

1. Open Configuration Manager.
2. Select the Profile tab.
3. Click Edit to open the Default profile.
4. Select the Process Scheduler tab.
5. Examine the Output Directory value.

Open Data Mover using a valid PeopleSoft Operator ID and run this script to remove obsolete node transaction data associated with the obsolete objects in the PTUPGIBDELETE project.

Task 7-4-10: Changing the User Interface

PeopleTools has updated the styles that define the user interface. This PeopleTools release delivers the classic (old) style as well as two new styles: a dark blue style and a light blue style. PeopleTools System Databases and PeopleSoft 8.4 applications use the classic style, but all other applications use the new dark blue style. The classic style is set as the default. To use one of the new user interfaces, you have to delete the substyle sheets associated with the classic style and replace them with either the light or dark blue substyle sheet.

Note. The new user interface is supported by Internet Explorer release 5 and above and Netscape Navigator release 6 and above. If you are using a browser and release other than these, the system defaults to the classic style.

To enable a new user interface:

1. In Application Designer, select File, Open.
2. On the Open Definition dialog box, select *Style Sheet* from the Definition drop-down list.
3. Enter the name *PSSTYLEDEF* in the Selection Criteria Name field, and select Open.
4. Highlight *PSSTYLEDEF* in the list, and select Open.
5. Click the *PSALTERNATE* Sub Style Sheet and press DELETE.
6. Select Insert, Insert Sub Style Sheet.
7. Select *PSALTERNATE_LIGHTBLUE* or *PSALTERNATE_DARKBLUE*.
8. Repeat steps 5 through 7 for the *PTSTYLEDEF* Sub Style Sheet, making sure to use the same extension (*_LIGHTBLUE* or *_DARKBLUE*) you used for *PSALTERNATE*.
9. Select File, Save.
10. Open the style sheet *PSQUERYSTYLEDEF* as in steps 1 through 4.
11. Click the *PTQUERYSTYLESUB* Sub Style Sheet and press DELETE.
12. Select Insert, Insert Sub Style Sheet.
13. Select *PTQUERYSTYLESUB_LIGHTBLUE* or *PTQUERYSTYLESUB_DARKBLUE*.
Use the same extension that you used in step 8.
14. Select File, Save.

Task 7-5: Running Additional Data Mover Scripts

To import additional data for your specific PeopleSoft database, or to make other required changes, you may need to run additional Data Mover scripts. These script files have the extension *.dms* and are sometimes referred to as “DMS scripts.” They are located in the *<PS_HOME>\scripts* directory of your file server, and need to be run from the file server by means of Data Mover.

For the details on which additional application-specific Data Mover scripts to run, consult your application-specific installation instructions.

If you have installed a language other than English, you may need additional instructions on language-specific Data Mover scripts.

See Installing a Multilingual PeopleTools System Database.

Task 7-6: Installing a Multilingual PeopleTools System Database

This section discusses:

- Understanding the Multilingual Database Project
- Applying the Multilingual Database Project
- Populating the Translated System Data

Understanding the Multilingual Database Project

The information in this section applies if you are installing a multilingual PeopleTools System database. If not, skip this task and go on to the task “Running VERSION Application Engine Program.” If you are installing an application database (for example, HRMS, FSCM, EPM, and so on), you do not need to run this task.

If you are adding a new (PeopleSoft-delivered) language to the PTSYS database, you must execute this step for that language. For example, if you want to add Polish to your current multilingual database, you should install Polish from PPLTLSML so you will get all objects. If you only “upgrade” your database to have Polish using PPLTLS84CURML, you will only get the objects that changed between 8.40 and the current release.

If you are installing a PeopleTools System database and you want it to be multilingual, you need to perform the steps in the following section after the database has been loaded with Data Mover.

See Applying the Multilingual Database Project.

Note. When you log onto the multilingual database, be sure to select the base language of the database.

Task 7-6-1: Applying the Multilingual Database Project

This procedure describes how to apply the multilingual database project that contains translations of the PeopleTools objects.

To apply the multilingual database project:

1. Launch Application Designer.
2. Select Tools, Copy Project, From File.
3. In the resulting dialog box, change the import directory to <PS_HOME>\projects.
4. Select *PPLTLSML* from the list of projects and click the Open button.
5. In the Upgrade Copy dialog box, make sure that all object types are selected.
6. Click the Options button, select the Copy Options tab, and ensure that only the non-English languages you have installed are selected.

Please note that English and Common should *not be selected*.

7. Select the languages that you are currently installing from the Copy Options dialog box.
8. Click the Copy button.

(The Reset Done Flags check box will be selected; accept this default.)

Task 7-6-2: Populating the Translated System Data

To populate the translated system data:

Note. You need to run the following script in User mode.

1. Launch Data Mover.
2. Open the pt849tlsx.dms script using File, Open.
3. Select File, Run

Note. The portion of the script name xxx is equivalent to the language code (that is, FRA, CFR, GER, JPN, and so on) of the languages you have installed. There will be a Data Mover script for each language.

Task 7-7: Running VERSION Application Engine Program

Run the VERSION Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <userid> -CP=>  
<userpswd> -R INSTALL -AI VERSION
```

Use the values for the database name and user ID that you entered on the startup tab of the Configuration Manager for <dbname> and <userid> respectively. However, be aware that <userpswd> is not the same as the connect password you entered on the Configuration Manager startup tab. Enter a value for <userpswd> that is the password you want to be associated with the <userid>.

See “Setting Up the Install Workstation.”

See Running the Database Configuration Wizard.

Task 7-8: Running SQR Reports

This section discusses:

- Running SQRs on the Client Workstation
- Creating a Shortcut to Run SQRs

Note. The following instructions describe how to run SQR reports from the client workstation. On the Windows client, you may prefer to create a shortcut to allow you to run the reports repeatedly. You can use these instructions to run SQRs required in the upcoming task “Checking the Database.” You can also choose to run SQR reports from the command line in console mode.

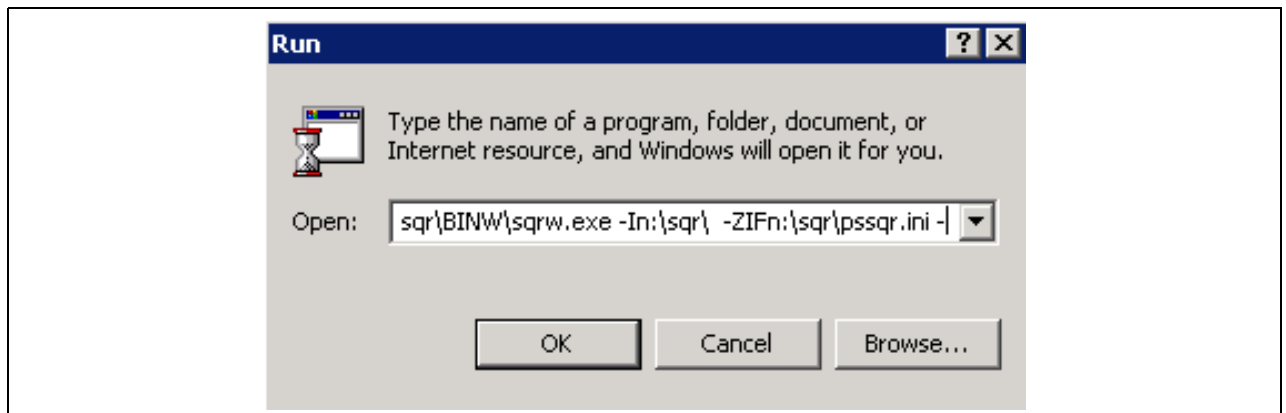
Task 7-8-1: Running SQRs on the Client Workstation

To run an SQR on the client workstation:

1. Select Start, Run, click Browse, and navigate to <PS_HOME>\bin\sqr\MSS\binw.
Select sqrw.exe and click Open.

2. Add any needed flags at the end of the command line.

Refer to the table that follows. For those flags that require attributes, append the attributes to the flags with no intervening spaces (for example, `-fd:\psbase\psenv\cr881dmo\`).



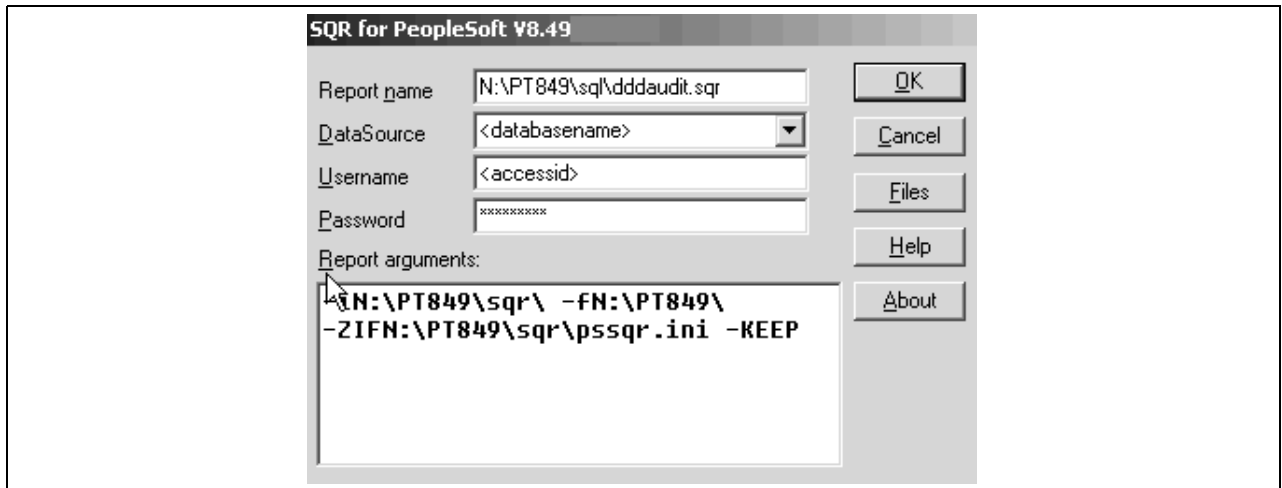
Running an SQR report on the client

The following table summarizes the SQR report arguments used by PeopleSoft. (For a full listing of report arguments, press the Help button to view the SQR help topic for this dialog box.)

Flag	Description
-I	Specifies the directories that SQR will search for the #INCLUDE files. (A trailing slash is required.)
-f	Specifies the directory where the report output will be sent. If you use the <code>-keep</code> flag, specify a directory with an ending slash. If you use the <code>-printer</code> flag, specify a full pathname with a filename for the HTML file.
-ZIF	Sets the full path and name of the SQR initialization file. The <code>-ZIF</code> flag should point to your <code><PS_HOME>\sqr\pssqr.ini</code> file.
-keep	Keeps the .SPF file after the program runs. This enables you to view the report with the SQR viewer.
-printer:ht	Generates the output file in HTML format. Specify the filename, with path location, with the <code>-f</code> flag.

3. Click OK.

The resulting dialog box should look something like this:



SQR for PeopleSoft Dialog Box

4. Enter the following values:
 - Enter the report name.
You must specify the full path.
 - Enter the database name in the DataSource field.
 - Enter the access ID in the Username field.
 - Enter the access password in the Password field.
5. Click OK to run the SQR report.

Task 7-8-2: Creating a Shortcut to Run SQRs

If you think you may need to run the SQR reports more than once, you may want to create a shortcut on the Windows client workstation. To save the report arguments:

1. Open Windows Explorer on the machine on which you want to run SQR.
2. Navigate to <PS_HOME>\bin\sqr\MSS\binw.
3. Right-click sqrw.exe and click Create Shortcut.
4. Right-click the shortcut that you just created and select Properties.
5. On the Shortcut tab, add the same sqr flags that you used in the previous task after sqrw.exe in the Target entry box.
6. Click OK.
7. To run the report, double-click the shortcut and specify the following information in the dialog box:
 - Report Name: Enter the full path and the name.
 - Data Source
 - Username: Enter the access ID.
 - Password: Enter the access password.
 - Report arguments: Make any necessary modifications to the saved arguments.
8. Click OK.

Task 7-9: Checking the Database

Run and examine two SQR reports to verify that your database is complete.

See *Preparing to Run SQR*.

To verify that the database is complete, run the following SQR reports from the <PS_HOME>\sqr directory:

- dddaudit.sqr
- sysaudit.sqr.

For further information about the dddaudit and sysaudit reports, consult PeopleBooks. This documentation includes specific information on how to interpret the reports and how to fix any errors found there.

See *Enterprise PeopleTools 8.49 PeopleBook: Data Management*, “Ensuring Data Integrity.”

Note. If any records show up in the VIEWS-2 or TABLE-3 section of dddaudit and are contained within the PPLTLS84CURDEL project, you may safely drop these records using the SQL query tool for your platform.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Data Management

Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration

Task 7-10: Running Alter Audit

ALTER AUDIT is an online utility used to check whether the PeopleTools tables are synchronized with the underlying SQL data tables in your database. This process compares the data structures of your database tables with the PeopleTools tables to uncover inconsistencies. ALTER AUDIT then reports its findings. At this point of time in the install, we do not expect to see differences between the database structure and the tools tables.

Note. If your application database was delivered on the PeopleTools release you are installing (see chart at the beginning of the task “Updating PeopleTools System Tables”), this task is optional.

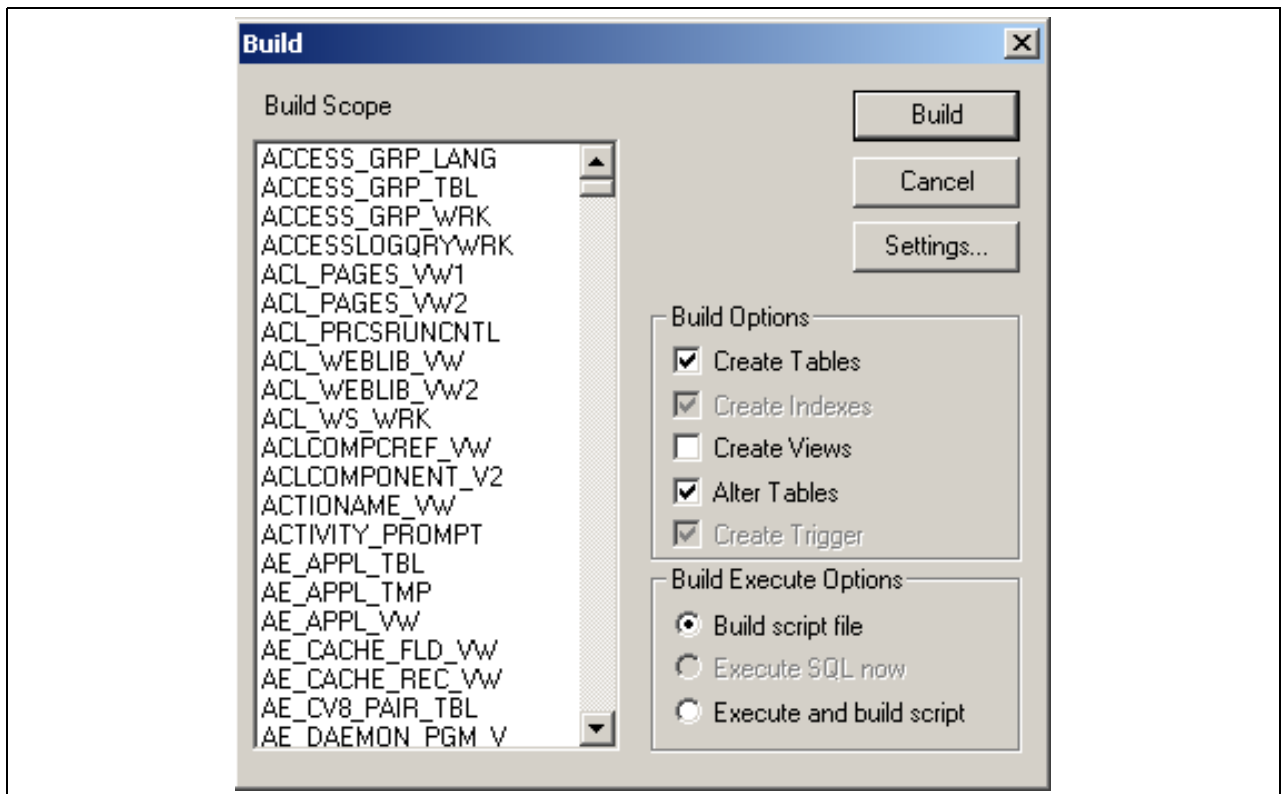
Note. Triggers are always dropped and re-created during the alter process and will always show up in the generated Alter Audit script. You can ignore the generated script for triggers.

To alter PeopleTools tables:

1. Launch PeopleTools and sign on to the installed database.
2. From the Application Designer select File, New.
3. Select Project and click OK.
4. Select Insert, Definitions into Project.
5. Select *Records* from the Definition Type drop-down list box.
6. Select *Table* from the Type drop-down list box.
7. Click Insert, and then click Select All.

8. Click Insert, and then click Close.
9. Select Build, Project.

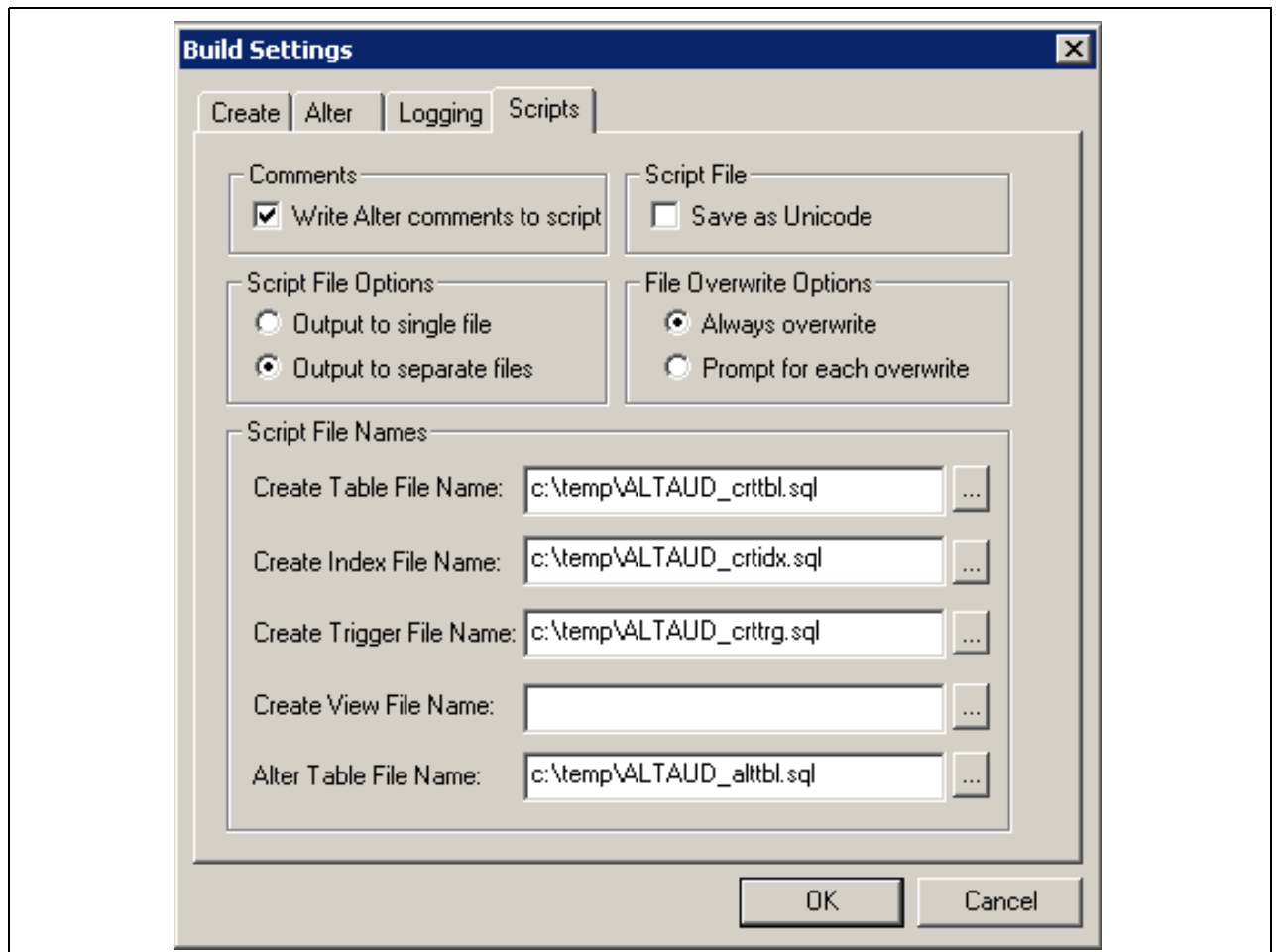
The Build dialog box appears:



The Build dialog box

10. Select Create Tables and Alter Tables in the Build Options region (Create Indexes and Create Trigger will automatically be selected).
11. Select Build script file in the Build Execute Options region.
12. Click Settings.

The Build Settings dialog box appears:

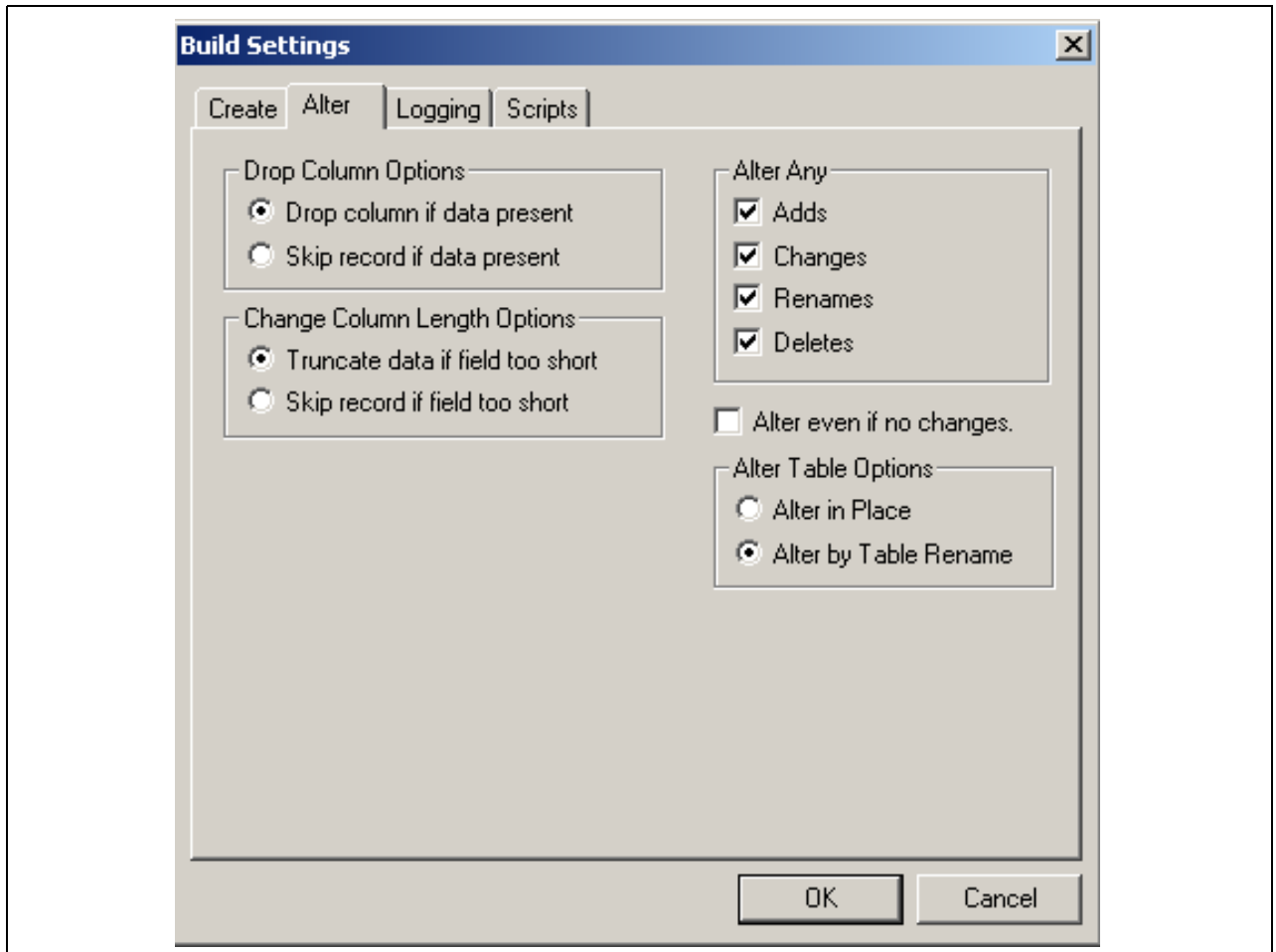


Build Settings dialog box: Scripts tab

13. Select the Scripts tab.
14. Select Write Alter comments to script.
15. Enter a unique output file name for each type.
16. Select the Alter tab and ensure that the Adds, Changes, Renames, and Deletes check boxes are selected in the Alter Any region.

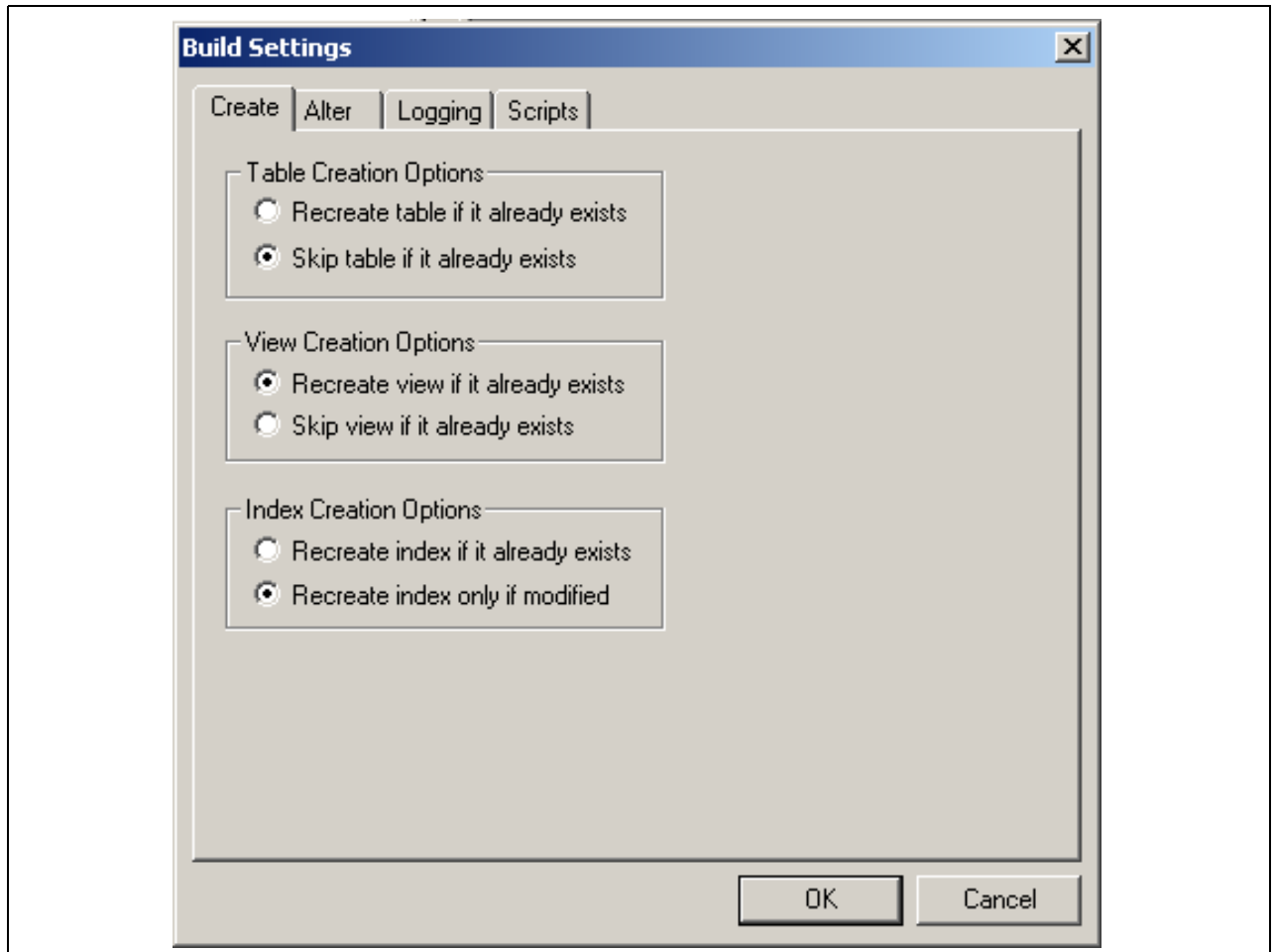
Drop column if data present should be selected in the Drop Column Options region, and Truncate data if field too short should be selected in the Change Column Length Options region.

Make sure that Alter by Table Rename is selected in the Alter Table Options region.



Build Settings dialog box: Alter tab

17. Select the Create tab, and ensure that the options Skip table if it already exists, Recreate view if it already exists, and Recreate index only if modified are selected.



Build Setting dialog box: Create tab

18. Click OK.

The Build dialog box reappears.

19. Click Build.

20. Click Close when the process is completed.

21. Run the generated SQL scripts in your platform-specific query tool to bring your database structure in sync with the PeopleTools tables.

CHAPTER 8

Configuring the Application Server on Windows

This chapter discusses:

- Understanding the Application Server
- Prerequisites
- Setting Up COBOL for Remote Call
- Verifying Database Connectivity
- Creating, Configuring, and Starting an Initial Application Server Domain
- Configuring Fonts for Languages

Understanding the Application Server

The information in this chapter is provided to help you configure your PeopleSoft application server.

Note. COBOL is not needed for PeopleTools or for applications that contain no COBOL programs. Check the information on PeopleSoft Customer Connection, and your application-specific documentation for the details on whether your application requires COBOL.

PeopleSoft supports a Windows application server to use with any of our supported databases.

You can install the application server using either a “logical” or “physical” three-tier configuration.

- Installing the application server on the same machine as the database server is known as a logical three-tier configuration. For your initial installation, PeopleSoft suggests that you install a logical configuration to simplify setup.
- Installing the application server on a machine separate from the database server machine is known as a physical three-tier configuration.

Note. You can start application servers as a Windows service, which means that administrators no longer need to manually start each application server that runs on a Windows machine.

Note. To test a three-tier connection from the PeopleTools Development Environment (the Windows-based client), sign on to PeopleSoft using Application Server as the Connection Type, and enter <Machine name or IP Address>:<WSL port number> for the application server name—for example, 224.160.192.128:7000. (As another alternative, you can use the Configuration Manager Startup tab to insert signon defaults and use the Profiles, Database/Application Server tab to specify connect information regarding your application server.)

See Also

“Using the PeopleSoft Installer,” Understanding PeopleSoft Servers

“Setting Up Process Scheduler on Windows,” Starting Process Scheduler as a Windows Service

Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration, “Using PSADMIN Menus”

Enterprise PeopleTools 8.49 PeopleBook: Data Management

PeopleSoft Customer Connection (Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms, PeopleSoft Enterprise)

“Compiling COBOL on Windows”

Prerequisites

Before beginning this procedure, you should have completed the following tasks:

- Installed your application server.

See “Using the PeopleSoft Installer,” Understanding PeopleSoft Servers.

- Installed Tuxedo 9.1.

See “Installing Additional Components.”

- Granted authorization to a PeopleSoft user ID to start the application server. User ID: VP1 for Enterprise Performance Management and Financials/Supply Chain Management, and PS for HRMS, should be delivered with authorization to start the application server.
- Run the following SQL statements on your database server to review and if needed, update the PSCLASSDEFN table:

```
SELECT CLASSID, STARTAPPSERVER FROM PSCLASSDEFN
WHERE CLASSID IN (SELECT OPRCLASS FROM PSOPRCLS WHERE OPRID='<OPRID>')
UPDATE PSCLASSDEFN SET STARTAPPSERVER=1 WHERE CLASSID='<CLASSID>'
```

Note. Installers typically use VP1 or PS to test the application server, and the password for these users is stored in a fairly accessible text file. If these users are deleted or their passwords are changed, the application server will no longer be available. To avoid this problem, you can set up a new operator (called PSADMIN or PSASID, for instance) with privileges to start the application server. If you do this, you can use the new operator for your application servers and you won't need to change the password each time VP1 or PS is changed.

Task 8-1: Setting Up COBOL for Remote Call

Remote Call is a PeopleCode feature that launches a COBOL program from an application server, PeopleCode program or a batch Application Engine PeopleCode program and waits for it to complete execution before continuing. The execution of a COBOL program via Remote Call is completely independent of the Process Scheduler. You need to set up a COBOL runtime environment and COBOL executables on the application server to support Remote Call.

See “Compiling COBOL on Windows.”

If your application does not contain COBOL programs, you do not need to purchase or compile COBOL.

See *Enterprise PeopleTools 8.49 Hardware and Software Requirements*.

Task 8-2: Verifying Database Connectivity

Before continuing, it is critical to verify connectivity to the database that the application server domain will use. To verify connectivity, connect to the database server from the application server using the native SQL tool on the application server.

For Microsoft SQL Server use isqlw.exe.

Task 8-3: Creating, Configuring, and Starting an Initial Application Server Domain

This section discusses:

- Creating, Configuring, and Starting the Application Server Domain
- Testing the Three-Tier Connection
- Importing an Existing Application Server Domain Configuration
- Setting Up a Custom Application Server Domain Configuration
- Troubleshooting Common Errors

Task 8-3-1: Creating, Configuring, and Starting the Application Server Domain

To create, configure, and start the application server domain:

1. To run PSADMIN, enter the following command:

```
cd <PS_HOME>\appserv  
psadmin
```

Note. Make sure you change the directory from the <PS_HOME> on the file server to the <PS_HOME>, or high-level directory, on the application server.

2. When the menu appears, specify *1* for Application Server and press ENTER.
3. Specify *2* to Create a domain and press ENTER.
4. Specify the domain name. For example:

```
Please enter name of domain to create :HR84
```

Domain names are case sensitive and must be eight US-ASCII characters or less. The domain name is used to create a directory name under the <PS_HOME>\appserv directory.

5. Specify 4 for small if this is your initial domain installation, press ENTER.

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*.

6. After the system creates the domain, this prompt appears:

Would you like to configure this domain now? (y/n) [y] :

Enter y. The PeopleSoft Application Server Administration menu appears with a Quick-configure menu similar to this:

Quick-configure menu -- domain: HR84

Features =====	Settings =====
1) Pub/Sub Servers : No	15) DBNAME : [HR84]
2) Quick Server : No	16) DBTYPE : [MICROSFT]
3) Query Servers : No	17) UserId : [QEDM0]
4) Jolt : Yes	18) UserPswd : [QEDM0]
5) Jolt Relay : No	19) DomainID : [TESTSERV]
6) WSL : No	20) AddToPATH : [c:\Program Files⇒
\Microsoft SQL Server\80\Tools\Binn]	
7) PC Debugger : No	21) ConnectID : [people]
8) Event Notification : Yes	22) ConnectPswd : [people]
9) MCF Servers : No	23) ServerName : []
10) Perf Collator : No	24) WSL Port : [7000]
11) Analytic Servers : Yes	25) JSL Port : [9000]
12) Domains Gateway : No	26) JRAD Port : [9100]
 Actions =====	
13) Load config as shown	
14) Custom configuration	
h) Help for this menu	
q) Return to previous menu	

HINT: Enter 15 to edit DBNAME, then 13 to load

Enter selection (1-26, h, or q):

Note. If you intend to use the PeopleSoft Report Distribution system, you must select *Yes* for feature 8, Event Notification. This enables the REN server, which is used by the “run to window” functionality of the Report Distribution system. *The Report Distribution system, MultiChannel Framework, and Optimization Framework use REN servers.* You must also remember to enter an Authentication Token Domain when installing the PeopleSoft Pure Internet Architecture (PIA).

Note. If your installation includes more than one application server domain on a given machine, read the troubleshooting section for more information.

See Troubleshooting Common Errors.

Note. If you are configuring an application server domain to support applications based on the PeopleSoft MultiChannel Framework (such as PeopleSoft CRM ERMS), select feature 9, MCF Servers.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft MultiChannel Framework*, “Configuring REN Servers.”

7. If you need to modify any of the values for these settings, enter the number next to the parameter name, type the new value, and press ENTER.
8. If you are using Microsoft SQL Server 2005, enter 20. Enter the Binn path. The default path is C:\Program Files\Microsoft SQL Server\90\Tools\Binn.
9. Configure the WSL to boot by changing option 6 to Yes.
Enter 6, and press ENTER.
10. If you are not installing a REN server, after you update the settings you can load the configuration by entering 13, for Load config as shown, from the Quick-configure menu.
11. If you are installing a REN server:
 - a. Enter 14 for Custom configuration.
 - b. Reply *y*, and press ENTER, at this prompt:
Do you want to change any config values <y/n> [n]?
 - c. Reply *n*, and press ENTER, at this prompt:
Do you want to change any values <y/n> [n]?

Continue to enter *n*, for No, for all sections until you see the PSRENSRV section, and then answer *y*. (Be aware that there are several sections.)
 - d. Leave the defaults for all settings except for default_auth_token, which you should set to the domain name for your web server.

Note. The default_auth_token setting should be identical to the Authentication Token Domain that you set during PIA installation.

See “Setting Up the PeopleSoft Pure Internet Architecture in GUI Mode.”

- e. Accept the defaults for the next series of questions until asked if you want Event Notification configured. In this case, answer *y*.
 - f. Accept the default for the remaining questions; the configuration will load automatically.
12. To start the application server (whether you installed a REN server or not), select 1, Boot this domain, from the PeopleSoft Domain administration menu.
13. Select 1, Boot (Serial Boot) or 2, Parallel Boot, from the PeopleSoft Domain Boot Menu.

Note. The messages you see and the number of processes started will depend on the options you chose during configuration.

14. If you plan to continue with PIA installation and testing, do not shut down the application server at this time.
15. If you want to shut down your PeopleSoft application server domain later, follow these simple steps:
 - a. From the PeopleSoft Domain Administration menu, enter 2 for Domain shutdown menu.
 - b. From the PeopleTools Domain Shutdown Menu, enter 1 for Normal shutdown.

You see messages about the application server processes being shut down. The number of processes stopped will vary depending on the number of processes that started when you booted the domain.
 - c. Enter *q* to quit the PeopleSoft Domain Administration Menu.

Task 8-3-2: Testing the Three-Tier Connection

If you get an error message when you try to start the application server, it may be due to an incorrect server name or port number, or because the server was not booted. To test a three-tier connection from the PeopleTools Development Environment (the Windows-based client):

1. Select Start, Programs, PeopleTools 8.4, Configuration Manager to start Configuration Manager.
2. Select the Profile Tab. Highlight Default and select Edit.
3. On the Edit Profile dialog box, select *Application Server* as the Connection Type.
4. Enter values for these parameters:
 - Application Server Name
 - Machine Name or IP Address
 - Port Number (WSL)
5. Select Set to add the definition to the list and select OK to close the dialog box.
6. On the Configuration Manager dialog box, select the Startup tab.
7. Select *Application Server* from the Database Type list. Your application server name should be displayed.
8. Enter the values for User ID, Connect ID, and password.
9. Click OK.

Note. Confirm that the application server is running by booting it. Select 1, Boot this domain, from the PeopleSoft Domain administration menu. Select option 1, Boot (Serial Boot) or 2, Parallel Boot, from the PeopleSoft Domain Boot menu.

10. Select Start, Programs, PeopleTools 8.4, Application Designer.
11. In the PeopleSoft Signon dialog box, select *Application Server* as the Connection Type, and confirm that the Application Server Name is correct. Enter values for User ID and password.
12. Select OK to open Application Designer.

Task 8-3-3: Importing an Existing Application Server Domain Configuration

If you have an existing application server configuration for a previous PeopleTools release, you can import it to create a new domain. You can import an existing domain configuration by specifying a file or by specifying the path to an existing domain. To import from a file, you must use the `psappsrv.cfg` file found inside an existing application server domain folder (you must specify the full path to `psappsrv.cfg`). This file can be located anywhere in the file system, but must be named `psappsrv.cfg`. To import from an existing domain configuration, you must specify `<PS_HOME>` and the name of an existing application server domain.

To import an existing application server domain configuration:

1. Run PSADMIN:

```
cd <PS_HOME>\appserv
psadmin
```

Note. Make sure you change the directory from the `<PS_HOME>` on the file server to the `<PS_HOME>` on the application server.

2. Specify *1* for Application Server:

```
-----
PeopleSoft Server Administration
-----
```

- 1) Application Server
- 2) Process Scheduler
- 3) Search Server
- 4) Service Setup
- q) Quit

Command to execute (1-4, q): 1

3. Specify *4* for *Import domain configuration*.

```
-----
PeopleSoft Application Server Administration
-----
```

- 1) Administer a domain
- 2) Create a domain
- 3) Delete a domain
- 4) Import domain configuration
- q) Quit

Command to execute (1-4, q): 4

4. Specify whether to import the domain configuration from a file (1) or from an existing application domain configuration (2).

```
-----
PeopleSoft Import Application Server Configuration
-----
```

- 1) Import from file

- 2) Import from application domain
- q) Quit

Command to execute (1-2, q) :

5. If you selected 1, provide the full path to the file psappsrv.cfg, and then specify the name of the domain you want to create. If you selected 2, go to the next step.

Enter full path to configuration file
:C:\temp\oldconfig\psappsrv.cfg

Enter domain name to create
:HR84

6. If you selected 2, provide the full path to the <PS_HOME> of the existing domain.

Enter PS_HOME of domain you wish to import
:C:\HR84

If applicable, choose among the existing application server domains in the specified <PS_HOME>:
Tuxedo domain list:

- 1) HR84A
- 2) HR84B

Select domain number to import: 1

Enter a name for new domain: HR84

Note. Once you create the domain, continue to the next task to verify that the imported configuration parameters are appropriate for the newly created domain. You may need to change the following values: DBName, DBType, UserId, UserPswd, Workstation Listener Port, Jolt Listener Port, Jolt Relay Adapter Listener Port. DBName can be the same or different, depending on which database the application server needs to point to. DBType depends on the database type of DBName. UserId and UserPswd are the user's choice. Workstation Listener Port will need to be modified if the old domain will be up and running in the same machine. Jolt Listener Port will also need a different number if the old domain will be up and running in the same machine. Jolt Relay Adapter Listener Port will need a different number if the old domain will be up and running in the same machine, and will be using Jolt Relay Adapter.

Task 8-3-4: Setting Up a Custom Application Server Domain Configuration

The Quick-configure menu is initially displayed when you choose to configure your domain. This menu is intended for the commonly adjusted parameters—those most likely to change from domain to domain. However, there are additional configuration parameters that are not available through the Quick-configure menu. For such configuration parameters, you must use the Custom Configuration option, which you can access from the Quick-configure menu. Feel free to skip this procedure if you have already created and configured your Application Server using the Quick-configure menu and want to move forward.

The following steps assume you will be using PSADMIN to specify parameter settings.

To reconfigure an application server domain:

1. Start PSADMIN by entering:

```
cd <PS_HOME>\appserv
psadmin
```

2. Specify *1* for Application Server and press ENTER.
3. Specify *1* for Administer a domain and press ENTER.
4. Select the domain to administer and press ENTER.
5. Specify *4* for Configure this domain and press ENTER.

The option Configure this domain performs the following tasks:

- Shuts down the application server, if it is running. (Shutdown is required since the binary file PSTUXCFG must be deleted and re-created to enable new configuration values. If there are no processes running when shutdown is attempted, an error will be displayed but the script continues on. This is normal.)
- Initiates an interactive dialog, prompting for configuration parameters.
- Updates psappsrv.cfg, generates psappsrv.ubb, and internally invokes Tuxedo's tmlodcf executable to create binary file PSTUXCFG used during the domain boot process.

6. Specify *14* for Custom Configuration and press ENTER.
7. Respond to this prompt:

Do you want to change any config values (y/n):

- Specify *y* to start an interactive dialog to change or examine parameter values, as described in the next step.

PeopleSoft recommends this option for more experienced users.

- Specify *n* if you have already edited psappsrv.cfg, skip the next step, and continue with step 9.

8. Complete the interactive dialog to specify configuration parameters.

Configuration parameters are grouped into sections. For each section, you are asked whether you want to change any parameters in that section, as in the following example:

Values for config section - Startup

```
DBName=
DBType=
UserId=
UserPswd=
ConnectId=
ConnectPswd=
ServerName=
```

Do you want to change any values (y/n)? [n]: y

Note. Enter the user ID and user password that has security to start the application server. All application databases are delivered with one or more application server security users, usually PS or VP1.

- Specify *y* to change any parameter values for the current configuration section displayed.
You are prompted for each parameter value. Either specify a new value, or press ENTER to accept the default if applicable. After pressing ENTER, you are positioned at the next parameter in that section. When you are done with that section, you are again asked whether you want to re-edit any of the values you changed.
- If you do not wish to change any values, specify *n* and you will be prompted for the next configuration section.

Note. The WSL, JSL, and JRAD port numbers have default values of 7000, 9000, and 9100, respectively. These values must be unique for each application server domain. You may alter the port values if necessary to ensure that they are unique.

Note. When setting up your application server, make a note of the values you use for Database Name, Application Server Name (the machine name), and JSL Port. You will need to use these same values when installing the PeopleSoft Pure Internet Architecture.

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*.

9. Select server process options.

At this point, you will be prompted to select server process options. If this is your initial installation, we suggest you accept the defaults. A message similar to this appears:

```
Setting Log Directory to the default... [PS_SERVDIR\LOGS]
Configuration file successfully created.
Loading new configuration...
```

“Loading new configuration” indicates that PSADMIN is generating a binary file named PSTUXCFG, which is used to boot the application server. At this point, your application server should be properly configured.

Task 8-3-5: Troubleshooting Common Errors

For troubleshooting help, you can access a log file through the PeopleSoft Domain Administration menu. The following information is a list of possible errors you may encounter.

- Use PSADMIN menu option 6 for Edit configuration/log files menu to check for errors in <PS_HOME>\appserv\<domain>\LOGS\APPSRV_mmdd.log and <PS_HOME>\appserv\<domain>\LOGS\TUXLOG.mmddyy.
- If a PeopleSoft server such as PSAPPSRV fails, examine your configuration parameters. The failure of the PSAPPSRV process is often signalled by the message “Assume failed”—which means the process has often failed to start. Check the SIGNON section for misspelled or invalid database name, an invalid or unauthorized OprId, or ConnectId or ServerName is missing or invalid. Finally, make sure the database connectivity is set correctly.
- If a WSL (or JSL) fails to start, try specifying another port number (it may be in use already by another application server domain process).
- If you are unable to start the BBL, check that your Tuxedo is installed fully and that the directory really exists.
- If the installation includes more than one application server domain on a single machine, before booting the second domain, adjust the REN server configuration to avoid conflict in one of these ways:

- Use PSADMIN to disable Event Notification (option 8 on the Quick-configure menu) for the second and subsequent app server domains.
- Change default_http_port to a value other than 7180.

See Also

Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft MultiChannel Framework

Task 8-4: Configuring Fonts for Languages

This section discusses:

- Configuring Asian Language Fonts

Task 8-4-1: Configuring Asian Language Fonts

For text that is rendered by the Java Virtual Machine on the application server (for example, charting) the appropriate fonts must be available on the system. If characters are missing or fail to display after installation, additional configuration may be needed. Fonts are defined with a logical name (such as 'psjvm.1') in the database, and a system font name (such as HGGothic) on the application server. Mappings between the logical name and the system font name are defined on the application server in <PSHOME>\class\PSOFTFonts.properties. These mappings generally do not need to be specified for non-Asian languages.

Note. psjvm.1 is used by default.

The information that follows is an example of the Japanese entries on Windows:

```
ps.lang.1=JPN
JPN.psjvm.1=MS Mincho
JPN.psjvm.2=MS Gothic
```

In the example above, 'psjvm.1' and 'psjvm.2' can be used in charting style classes.

See Also

Enterprise PeopleTools 8.49 PeopleBook: PeopleCode Language Reference, “Chart Class”

CHAPTER 9A

Setting Up the PeopleSoft Pure Internet Architecture in GUI Mode

This chapter discusses:

- Understanding PeopleSoft Pure Internet Architecture
- Using Authentication Domains in the PeopleSoft Pure Internet Architecture Installation
- Installing the PeopleSoft Pure Internet Architecture on Oracle Application Server in GUI Mode
- Installing the PeopleSoft Pure Internet Architecture on WebLogic in GUI Mode
- Installing the PeopleSoft Pure Internet Architecture on WebSphere in GUI Mode
- Testing the PeopleSoft Pure Internet Architecture Installation

Understanding PeopleSoft Pure Internet Architecture

This chapter explains how to install and configure the components of the PeopleSoft Pure Internet Architecture (PIA) in GUI mode. It includes instructions for installing the PeopleSoft files on Oracle Application Server (OAS), WebLogic, and WebSphere. Only complete the instructions for the web server product that you installed.

See “Installing Web Server Products.”

The setup program for the PeopleSoft Pure Internet Architecture is installed to the web server machine when you run the PeopleSoft Installer and select the PeopleSoft Web Server option.

See “Using the PeopleSoft Installer.”

PeopleSoft only supports customer installations that use the version of the web servers packaged with PeopleTools. *You must install the web server before you install the PeopleSoft Pure Internet Architecture.* Before you install the PeopleSoft Pure Internet Architecture, you must also have configured an application server, as described in the previous chapter.

If your web server is on a different machine than your application server, you need to make sure you have JRE installed on your web server to run the PIA installation.

The initial PIA setup automatically creates the default PeopleSoft site named *ps*. In subsequent PIA setups, change the site name from *ps* to a unique value. We recommend using the database name. This is handy for easy identification and ensures that the database web server files are installed in a unique web site.

The URL that you use to invoke PIA must conform to ASN.1 specifications. That is, it may contain only alphanumeric characters, dots ("."), or dashes ("-"). The URL must not begin or end with a dot or dash, or contain consecutive dots (".."). If the URL includes more than one portion, separated by dots, do not use a number to begin a segment if the other segments contain letters. For example, "mycompany.second.country.com" is correct, but "mycompany.2nd.country.com" is wrong.

Note. If you want to connect between multiple application databases, you need to implement single signon.

Note. If the PeopleSoft Pure Internet Architecture installation encounters an error, it will indicate which log files to refer to.

See “Installing Web Server Products.”

Note. The machine on which you run the PeopleSoft Pure Internet Architecture install must be running in *256 color mode*. This is not necessary for console mode.

The PeopleSoft Pure Internet Architecture installation includes the following products:

- *PeopleSoft Pure Internet Architecture*. This product is the centerpiece of the PeopleSoft architecture that enables users to work on a machine with only a supported browser installed. This option installs the servlets required for deploying PeopleSoft Applications and for the PeopleSoft Portal. The portal packs and Enterprise Portal have their own installation instructions, which are available on Customer Connection. For an overview of the various types of portals, consult the following.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.

- *PeopleSoft Report Repository*. This product works in conjunction with Process Scheduler to allow report distribution over the web.
- *PeopleSoft Integration Gateway*. This product is the entry and exit point for all messages to and from the Integration Broker. Its Java-based Connector architecture allows asynchronous and synchronous messages to be sent over a variety of standard protocols, many that are delivered at install, or through custom connectors.
- *PeopleSoft CTI Console*. This product works in conjunction with CTI vendor software to enable call center agents to take advantage of browser based teleset management and automatic population of application pages with relevant data associated with incoming calls, such as customer or case details.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft MultiChannel Framework*.

- *PeopleSoft Sync Server Gateway*. The Sync Server is a specialized application server optimized for concurrent multi-user synchronization processing in support of PeopleTools Mobile Agent. The web server-based Sync Gateway routes synchronization requests and messages to and from the appropriate Sync Server.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Mobile Agent*.

- *Environment Management Hub*. The Environment Management hub is a web application that is installed with the PeopleSoft Pure Internet Architecture and portal. It is started along with the rest of the web applications when the user boots the web server. You cannot start the Environment Management Hub on a server that is configured to run HTTPS; in other words, if you plan to run Environment Management, your PIA server needs to be configured in HTTP mode.

See *Enterprise PeopleTools 8.49 PeopleBook: Software Updates*.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Security Administration

Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration

“Installing PeopleSoft Plug-in for Oracle Enterprise Manager”

Using Authentication Domains in the PeopleSoft Pure Internet Architecture Installation

You have the option to specify an authentication domain when you install the PeopleSoft Pure Internet Architecture on OAS, WebLogic, or WebSphere.

Note. The authentication domain was referred to as the Authentication Token Domain in previous releases, and that term is still seen in the software.

When an authentication domain is specified during the PeopleSoft Pure Internet Architecture install, that value gets used as the Cookie domain in the web server configuration. The main requirements when setting a cookie domain are:

- The host must have a fully qualified domain name (FQDN). The requirement that you must have a domain name does not imply that you must have a DNS, but you do need some type of naming service such as DNS or some managed `..etc\hosts` file that contains a list of the servers with their domain name.
- The cookie domain value being set must begin with a dot (`.ps.com` is valid, `ps.com` is NOT valid).
- The cookie domain value being set must contain at least 1 embedded dot (`.ps.com` is valid, `.corp.ps.com` is valid, `.com` is NOT valid).
- The cookie domain value can only be a single domain name. It cannot be a delimiter-separated list of domains.

By default, the browser only sends cookies back to the machine that set the cookie. So if web server `crm.yourdomain.com` sets a cookie, the browser will only send it back there. You can make the browser send the single signon cookie to all servers at `yourdomain.com` by typing your domain name in the Authentication Token Domain list box of web server `crm`.

Specifying the authentication domain may be necessary in certain cases. For example, if you plan to use the PeopleSoft portal technology, be sure to read the supporting documentation to determine whether setting the authentication domain is required for correct operation.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*, “Configuring the Portal Environment.”

Specify an authentication domain if you plan to run a REN Server. REN Servers are required for PeopleSoft MultiChannel Framework, Reporting, and some PeopleSoft CRM applications supported by PeopleSoft MultiChannel Framework.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft MultiChannel Framework*.

Specify an authentication domain if you plan to use Business Objects Enterprise.

See “Installing and Configuring Software for Crystal Reports,” Installing BusinessObjects Enterprise XI.

Task 9A-1: Installing the PeopleSoft Pure Internet Architecture on Oracle Application Server in GUI Mode

This section discusses:

- Installing the PeopleSoft Pure Internet Architecture on Oracle Application Server
- Uninstalling the PeopleSoft Pure Internet Architecture from Oracle Application Server

Note. The installation of the PeopleSoft Pure Internet Architecture on Oracle Application Server includes the PeopleSoft Provider. Use this to configure PeopleSoft portlets on Oracle Portal pages.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*, “Deploying PeopleSoft Portlets on Oracle Portal Pages.”

Task 9A-1-1: Installing the PeopleSoft Pure Internet Architecture on Oracle Application Server

Before installing the PeopleSoft Pure Internet Architecture (PIA) on Oracle Application Server (OAS), you must have installed the OAS software.

See “Installing Web Server Products,” Installing Oracle Application Server.

When installing PIA on OAS, you must work with a local copy of the PIA installation software; you cannot install remotely. If you are doing the installation on a machine other than the one on which you installed PeopleTools, copy the <PS_HOME>\setup\PsmPPIAInstall directory to the local machine.

Note. Install PIA with the same user who installed OAS.

1. Start opmn process if necessary.

To check the status of the opmn process run this command:

```
<OAS_HOME>\opmn\bin\opmnctl status
```

If you get the response, “Unable to connect to opmn”, start it by running this command:

```
<OAS_HOME>\opmn\bin\opmnctl start
```

See “Installing Web Server Products,” Installing Oracle Application Server.

2. Check whether the following processes are running by opmnctl status
HTTP_Server and “home” OC4J.

If they are not running please start the processes by issuing the following command:

```
<OAS_HOME>\opmn\bin\opmnctl startproc process-type=HTTP_Server
```

```
<OAS_HOME>\opmn\bin\opmnctl startproc process-type=home
```

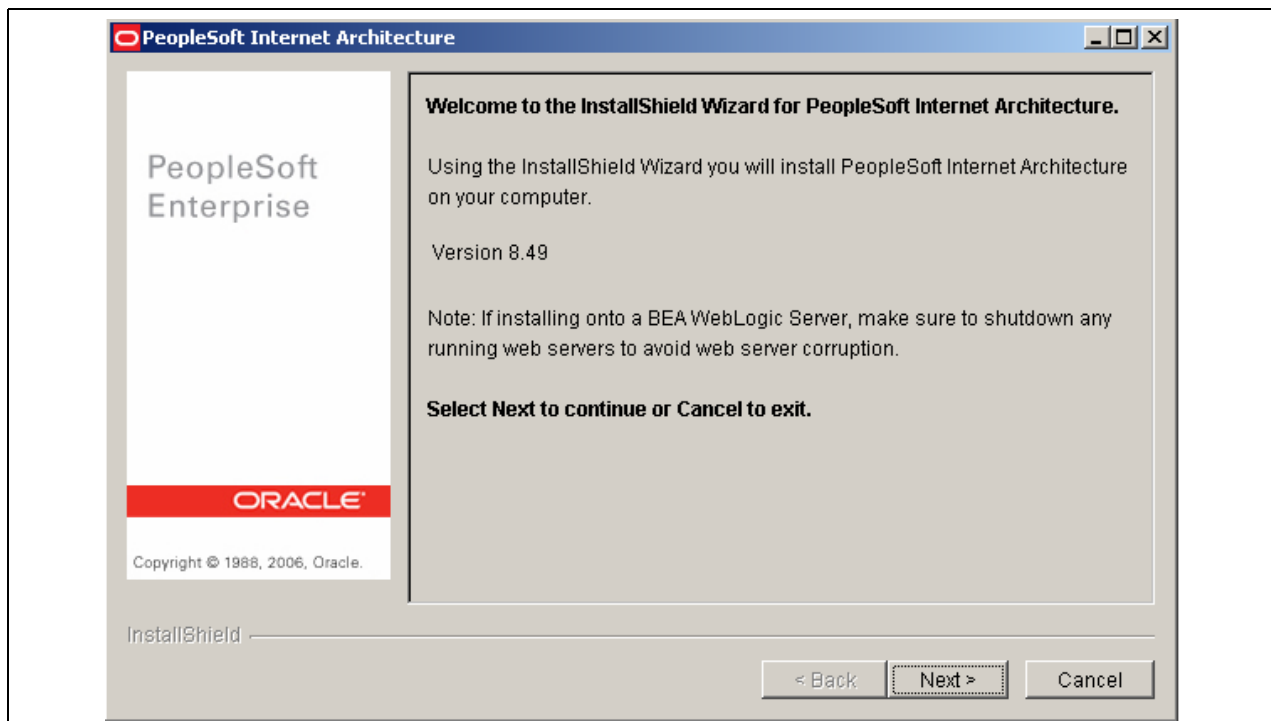
3. Navigate to <PS_HOME>\setup\PsmPPIAInstall.
4. Run setup.exe for Windows.

Run setup <platform> for UNIX platforms.

Alternatively, at the command prompt, type `<JAVA_HOME>\bin\java -cp setup.jar run`, where `<JAVA_HOME>` is the directory where the JRE software is installed. The default is `<PS_HOME>\jre`.

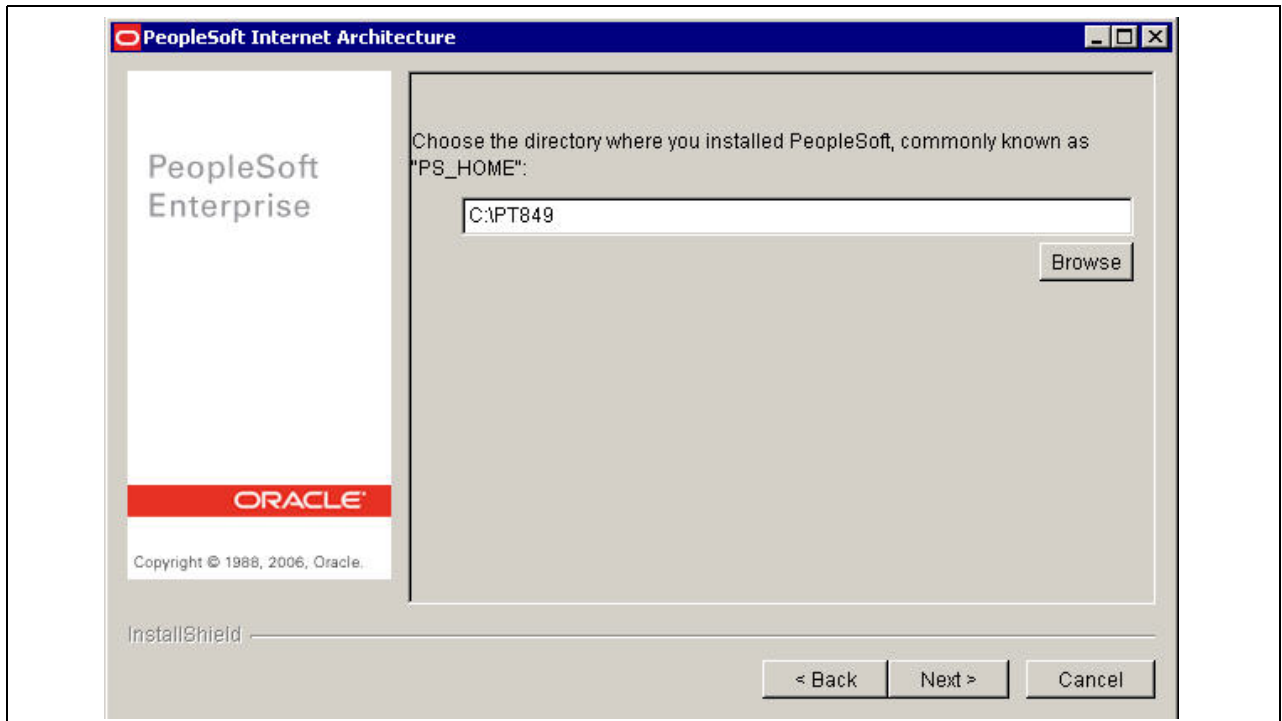
See “Using the PeopleSoft Installer,” Prerequisites.

5. Click Next on the welcome screen.



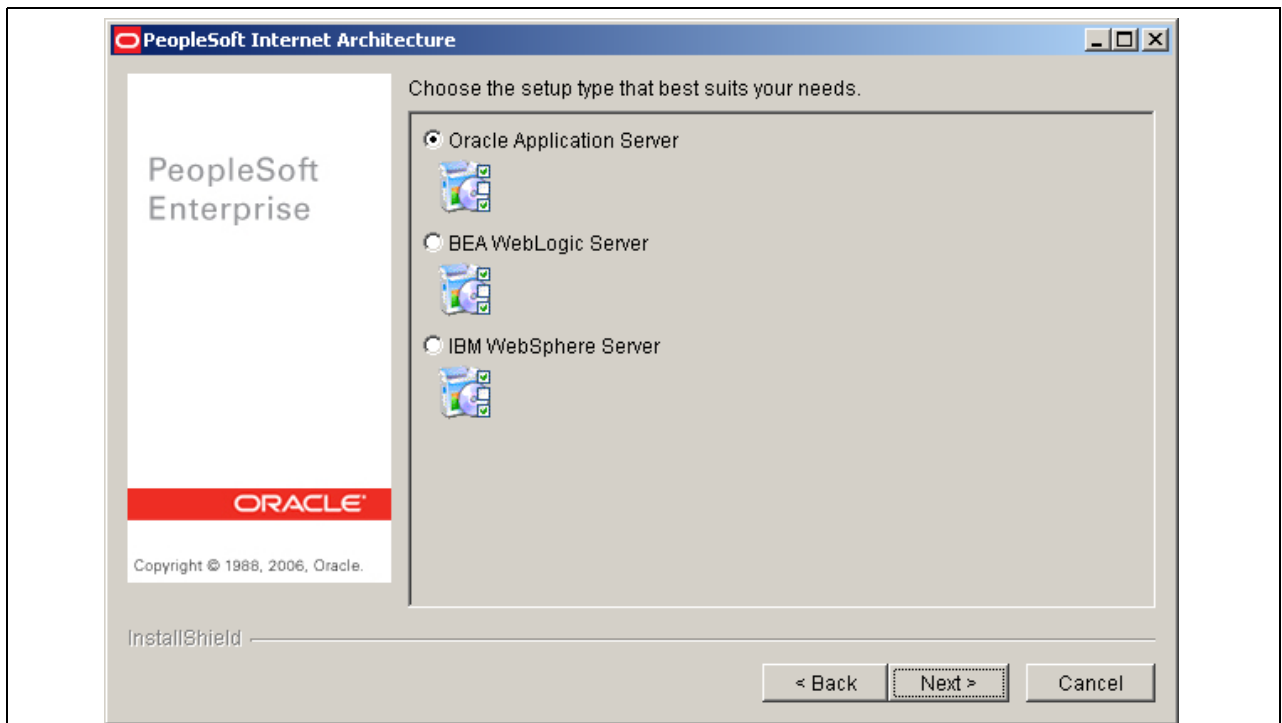
PeopleSoft Internet Architecture Welcome window

6. Enter the location of `<PS_HOME>`, the home directory where you installed PeopleTools.



Specifying the PeopleSoft home directory

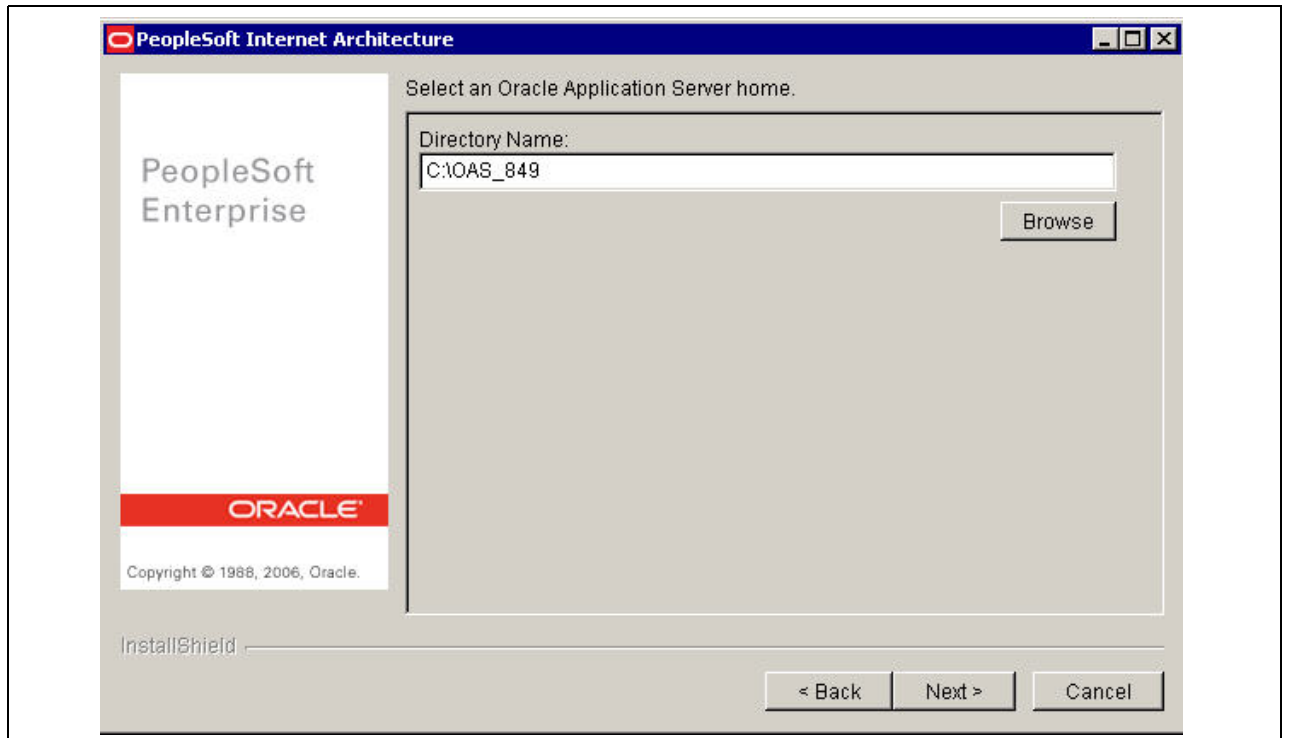
7. Accept Oracle Application Server as the setup type.



Choosing Oracle Application Server

Click Next.

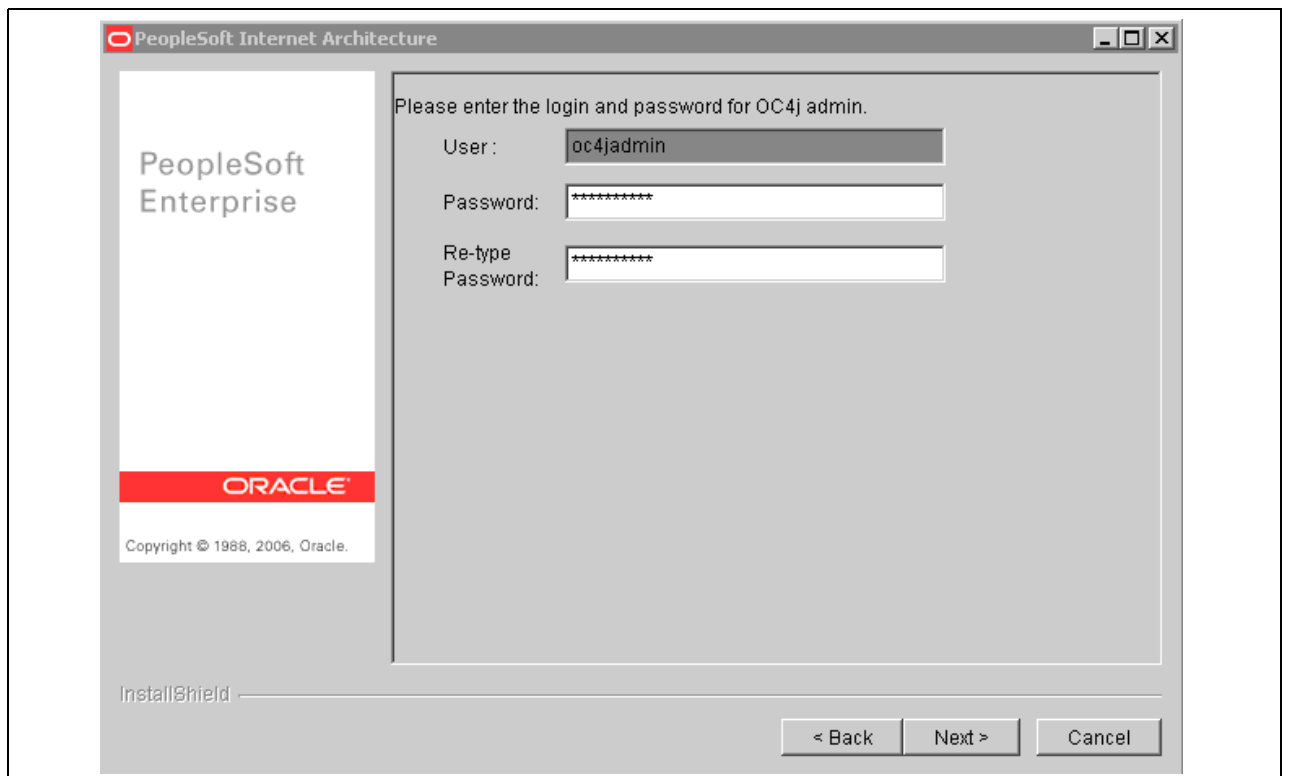
8. Specify the OAS home directory; that is, the directory where you installed the OAS software.
Click Next.



Specifying the OAS home directory

9. Enter OAS admin password.

Note. This should be the same password that was given during OAS installation



Entering the login and password for OC4J

10. Enter an application name for this web server (for example, PeopleSoft) and select the type of server you want to install.

The *Single Component Server* option creates one OC4J component to hold all the PeopleSoft web applications. The installer uses the Application Name you enter for the new component's name.

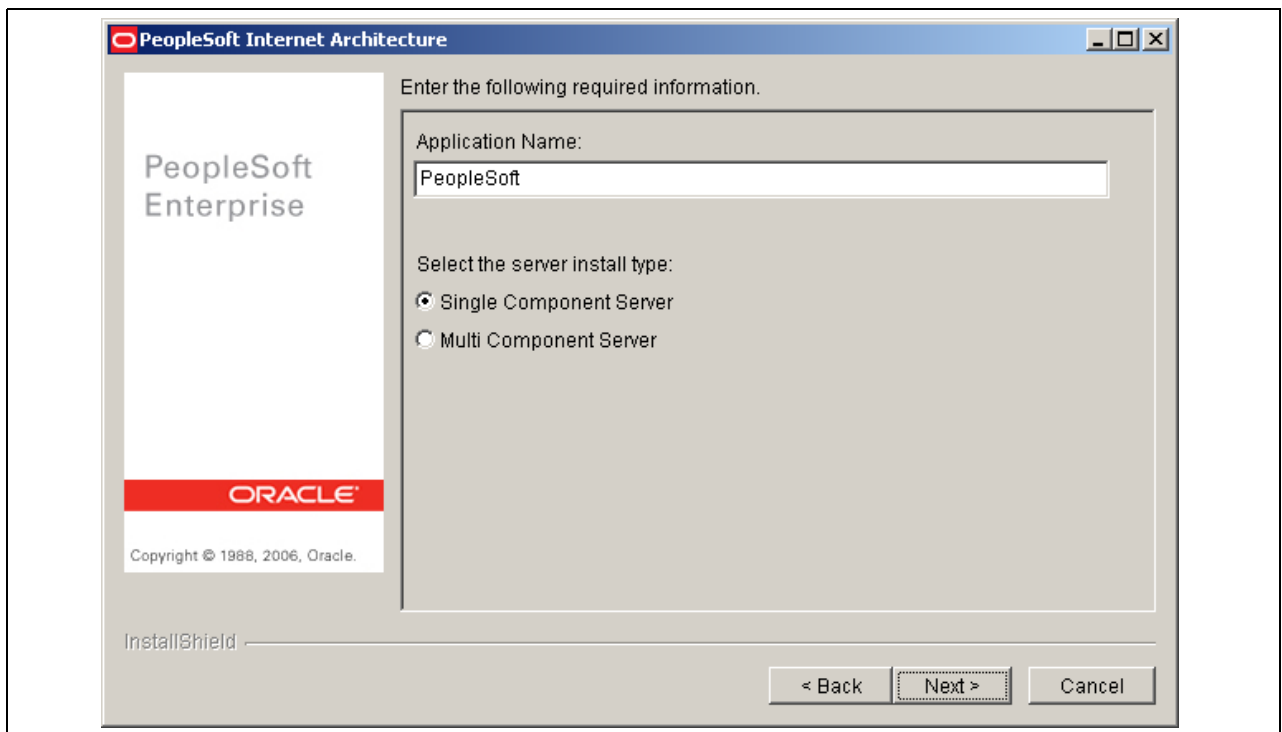
The *Multi Component Server* option splits the PeopleSoft web application into three OC4J components—PIA_<application_name>, PSOL_<application_name> (for the PeopleSoft Online Library), and PSEMHUB_<application_name> (for the PeopleSoft Environment Management Framework). Each OC4J component has its own JVM, so the multicomponent option will be better suited for installations needing higher performance or reliability. If you are not sure which to pick choose Single.

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*, “Working with Oracle Application Server 10g.”

See “Installing PeopleBooks.”

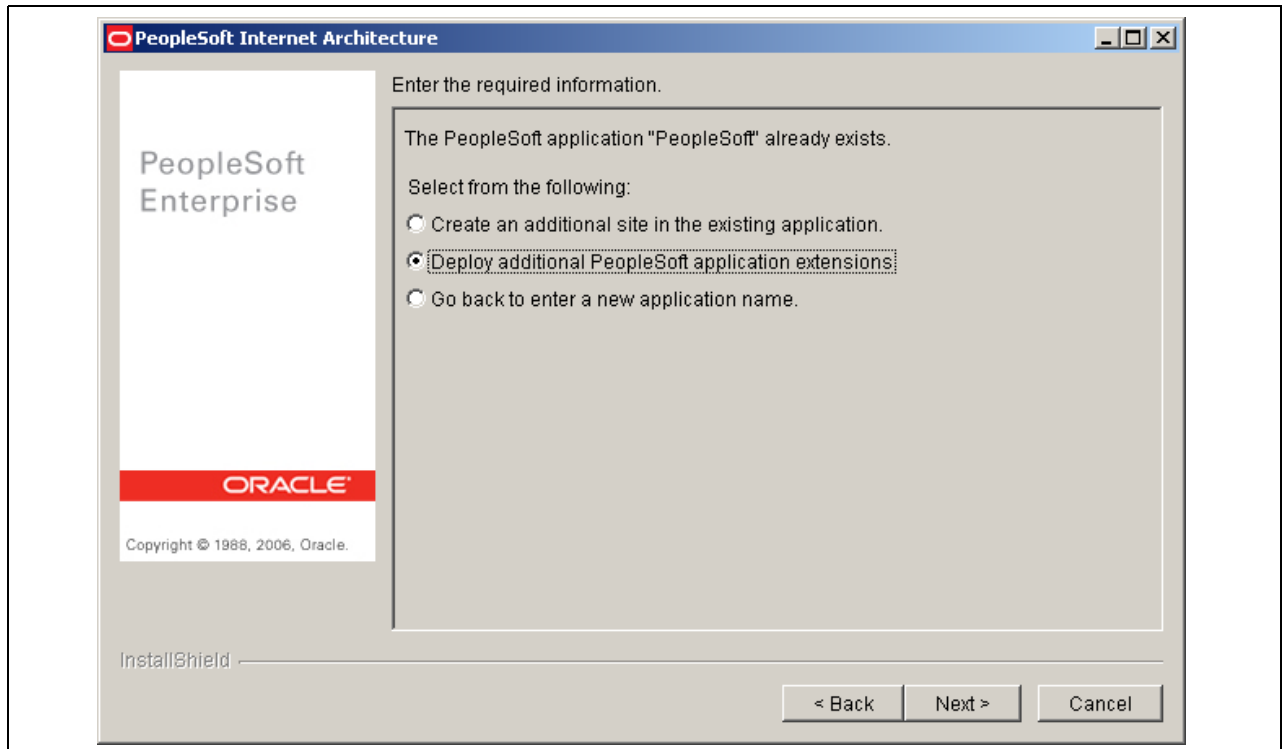
See *Enterprise PeopleTools 8.49 PeopleBook: Software Updates*, “Configuring and Running Environment Management Components.”

11. Enter an Application Name and go to step 12.



Specifying the application name and server type

12. Select Single Component Server or Multi Component Server and click Next. If the Application Name that you entered is unused, skip the next two steps. Continue with step 15.
13. If the name you enter belongs to an OAS web server application that already exists, then select one of the options:

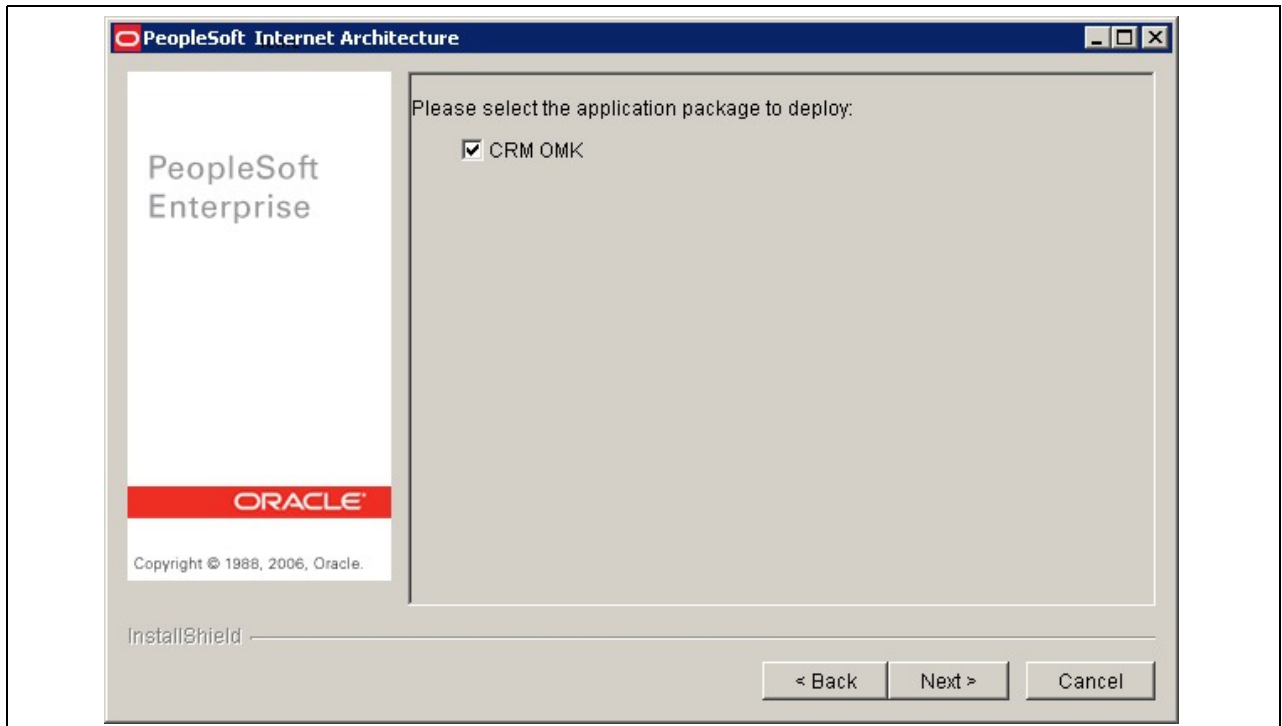


Selecting the installation options for an existing OAS application

- *Create an additional site in the existing application:* Select this option to install only the necessary files for defining an additional PeopleSoft site onto the existing OAS web server configuration.
- *Deploy additional PeopleSoft application extensions:* This option is solely for use with PeopleSoft product applications. PeopleSoft application extensions are provided with certain PeopleSoft applications, and this option allows you to deploy those extensions. Consult the installation documentation for your PeopleSoft application to see whether this option is appropriate. PeopleTools does not use application extensions.
- *Go back to enter a new application name:* Select this option to return to the previous window.

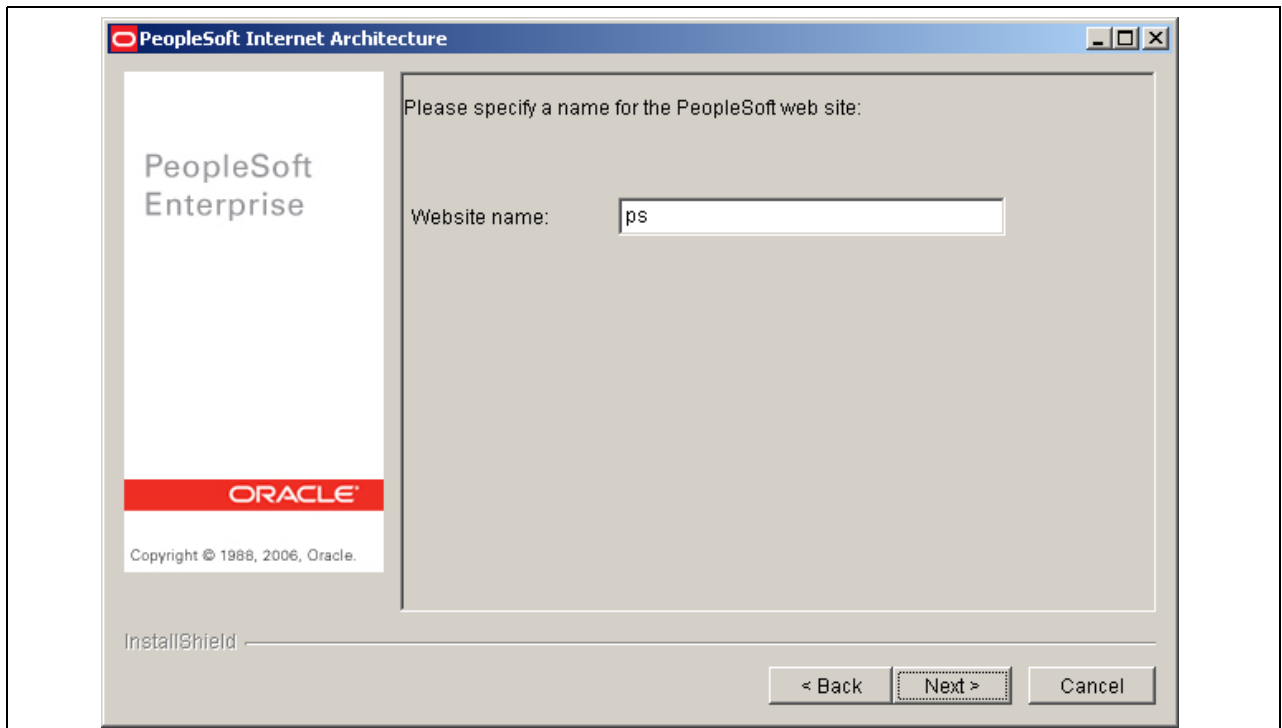
Note. To redeploy PIA on OAS, you must remove the OC4J component(s) and perform a fresh PIA installation. Use Application Server Control or use the `removeinstance` command to remove the OC4J component(s). Any customizations performed after the PIA install must be done again.

14. If you select the option Deploy additional PeopleSoft application extensions, a window appears listing the available application packages. Select the check boxes for those applications you want to deploy:



Selecting application packages to deploy

15. Enter a web site name; the default is ps.



Entering the web site name

16. Specify the application server name, its JSL (Jolt Station Listener) port number, its HTTP and HTTPS port numbers, the Authentication Token Domain (optional), and click Next.

Specifying the app server name, port numbers, and authentication token domain for the OAS installation.

AppServer name	Enter the name of your application server machine.
JSL Port	Enter the JSL port number you specified when setting up the application server (the default is 9000).
HTTP/HTTPS	The default HTTP/HTTPS ports of the Oracle HTTP Server (OHS) are 80/443 for Windows and 7777/4443 for UNIX/Linux. However, you should enter different HTTP/HTTPS port values at this point for the PIA installation. Please use any unused port other than 80/443 for Windows and 7777/4443 for UNIX/Linux. The PIA installation may fail or may not work properly if you enter the same HTTP/HTTPS ports for the PIA installation as the default OHS ports. To access PIA, specify a URL with either the default OHS port values, or the port values you enter here for PIA. For example, <code>http://<machine_name>:<port_number>/<site_name>/signon.html</code>. For Multi Component Server, the HTTP/HTTPS ports that you enter here correspond to the OC4J component <code>PIA_<application_name></code>. For the other two OC4J components, PIA installer will assign the ports. PIA installer adds +1 to the entered HTTP & HTTPS ports and assigns them to <code>PSEMHUB_<application_name></code> OC4J component and adds +2 to the entered HTTP & HTTPS ports and assigns them to <code>PSOL_<application_name></code> OC4J component respectively.
Authentication Token Domain	The value you enter for Authentication Token Domain must match the value you specify for the authentication domain when configuring your application server. In addition, certain installation configurations require that you specify an authentication domain.

See Using Authentication Domains in the PeopleSoft Pure Internet Architecture Installation.

17. Enter the name of the web profile in the database that will be used to configure this PeopleSoft web site.

This can be either a predelivered name as shown on the page, or one you intend to create yourself using PeopleTools, Web Profile Configuration, after logging in. Each site is configured according to the profile you specify here when it is first accessed after the web server is booted. The user ID and password will be used by the PIA servlets themselves at runtime to log in to the application server to retrieve the profile. For applications on PeopleTools 8.44 and above, PeopleSoft predelivers the PTWEBSEVER user ID for the purpose of configuring PIA servlets at runtime and running the Performance Monitor Agents. You may have to unlock that user profile in certain application databases. If you have any problems logging in after starting the web server, refer to the application server domain logs.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.

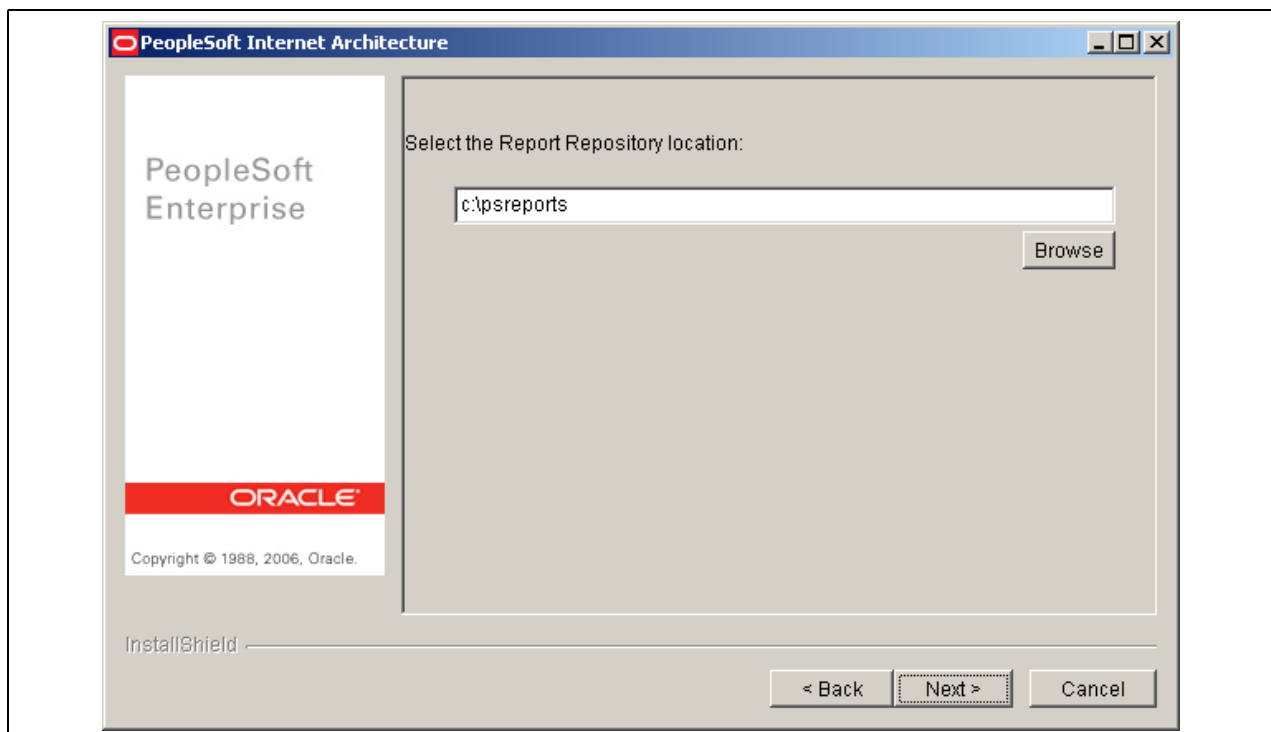
Note. If you are upgrading your application database to PeopleTools 8.44 and above, you must set up the PTWEBSEVER user ID. Go to PeopleTools, Security, User Profiles, User Profiles. Click Add a New Value, enter PTWEBSEVER for User ID, and click Add. Enter and confirm a password, and enter a description. Enter the role *PeopleTools Web Server* and then click Save.

Specifying the web profile, user ID, and password

18. Specify the root directory for the Report Repository (c:\psreports by default), and click Next. You can install to any location.

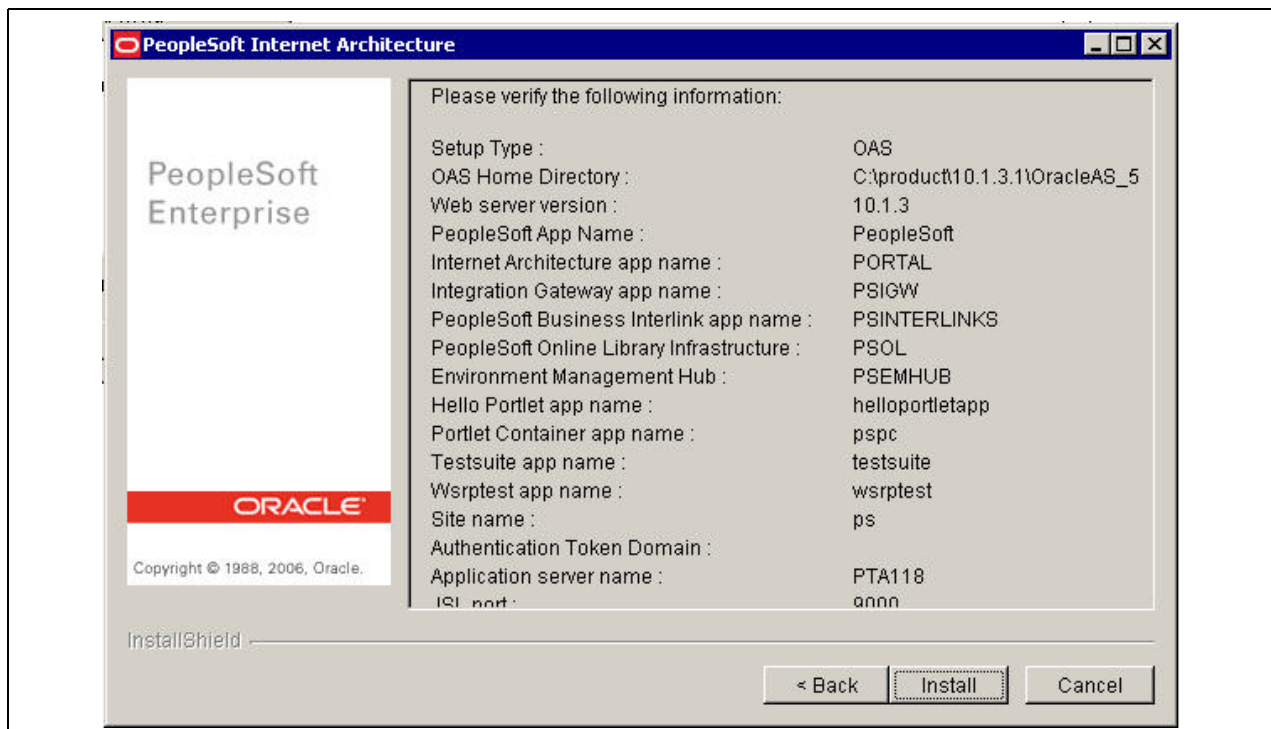
Note. For the Report Repository directory, specify the same directory that you specify as the Home Directory. Make sure that this directory is shared.

See “Setting Up Process Scheduler on Windows,” Setting Up the Process Scheduler to Transfer Reports and Logs to Report Repository.



Specifying the Report Repository location

19. Verify your selections on the summary window (click Back if you need to make any changes).
Click Install to start the installation. An indicator appears showing the progress of the installation.



Verifying the installation information

20. Click Install.

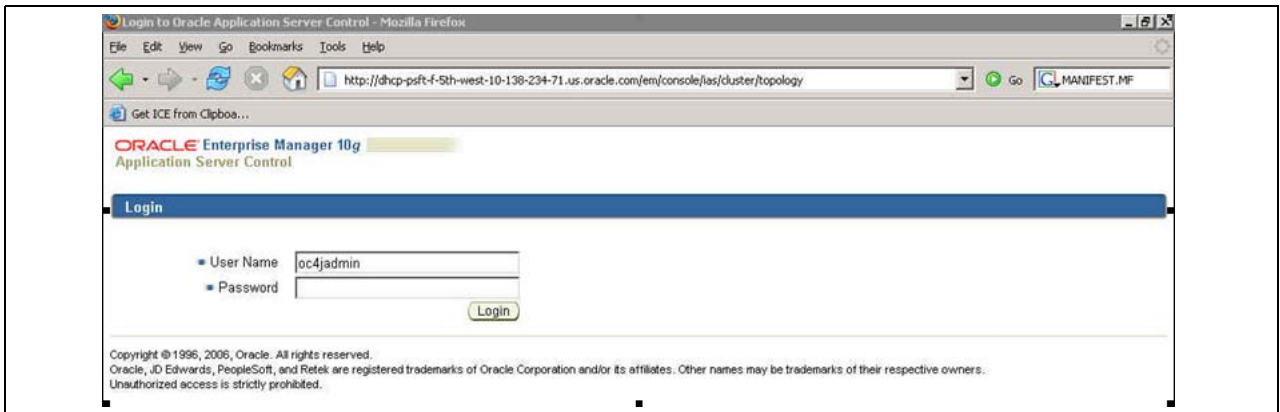
The default installation directory is <OAS_HOME>\j2ee\<component>\applications\<application>.

Task 9A-1-2: Uninstalling the PeopleSoft Pure Internet Architecture from Oracle Application Server

PIA is installed on OAS as an OC4J component. To uninstall PIA, stop the OC4J component(s) and then remove the OC4J component(s).

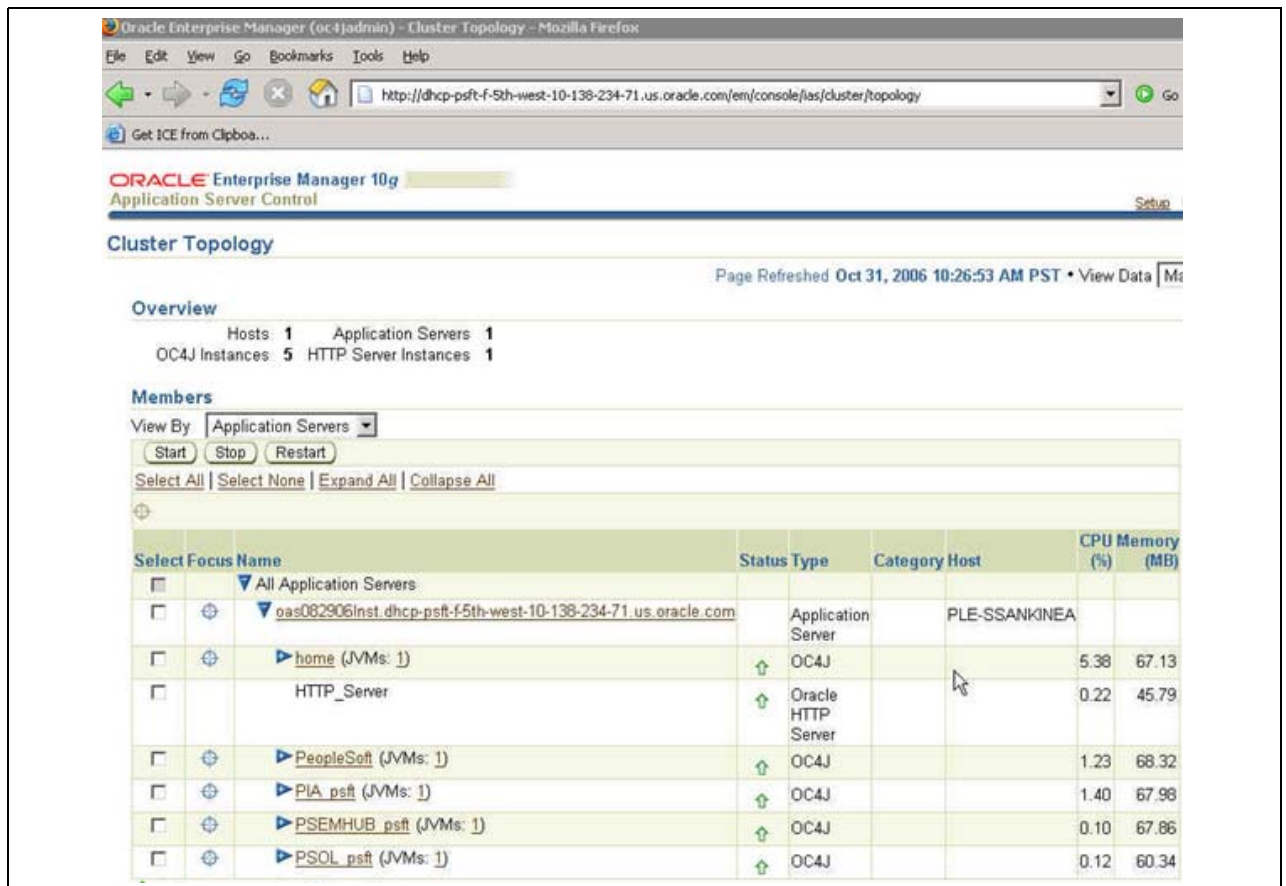
Using Application Server Control

1. Access the Application Server Control console page in a browser by entering the URL `http://<machine-name>:<ohs-port>/em`
2. Enter `oc4jadmin` for user name and use the admin password (the password chosen during OAS Install) as the password here.



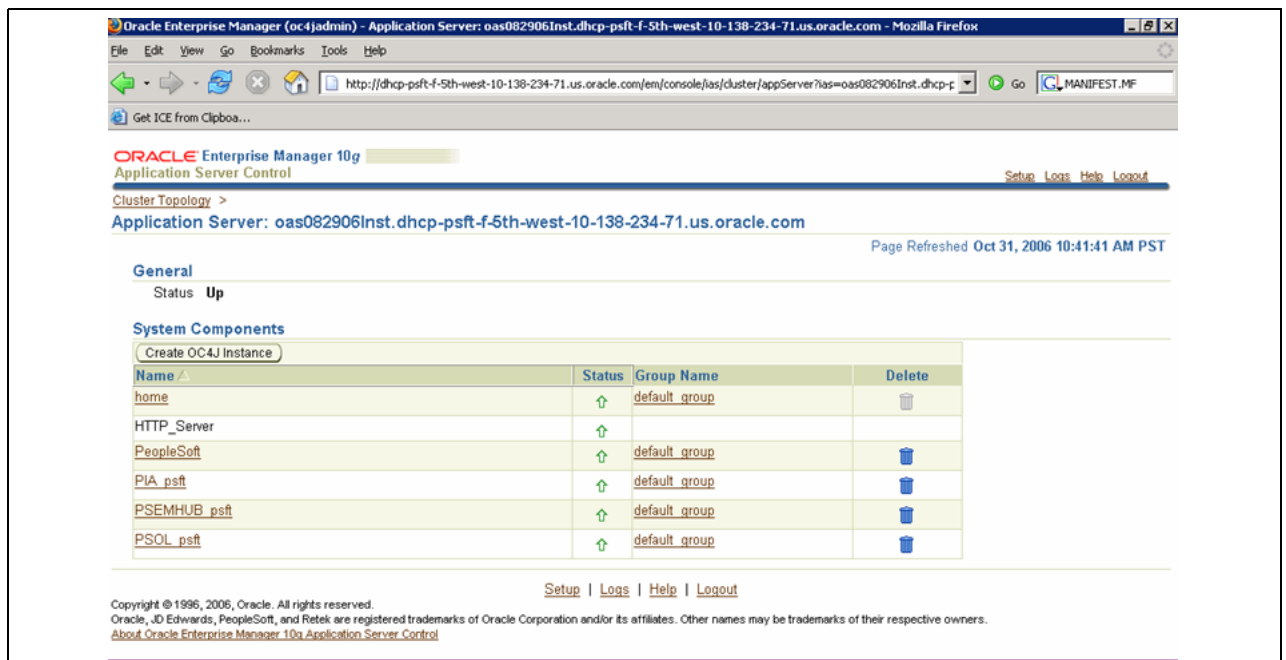
The Application Server Console Page

3. Click on the Application Server instance link.



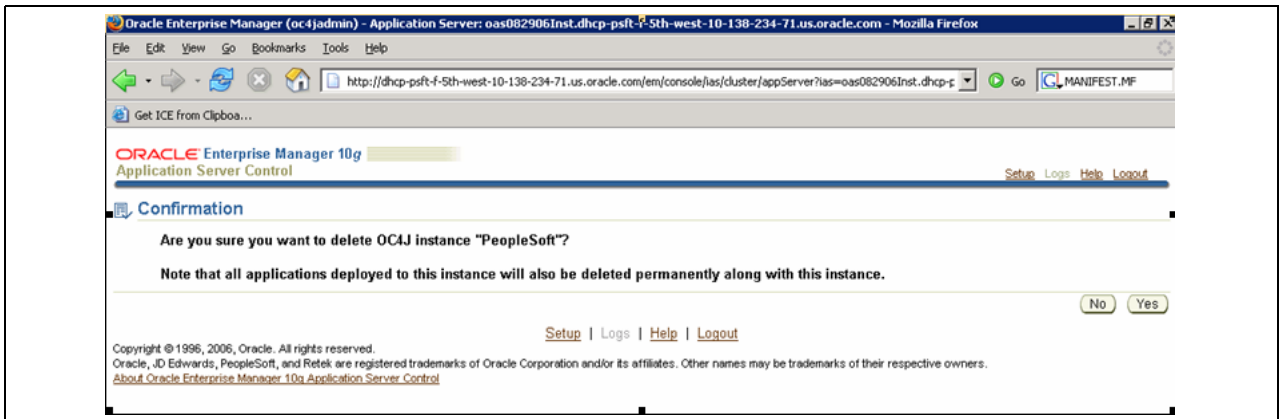
Selecting the Application Server Instance

- Click the Delete icon corresponding to the OC4J component.

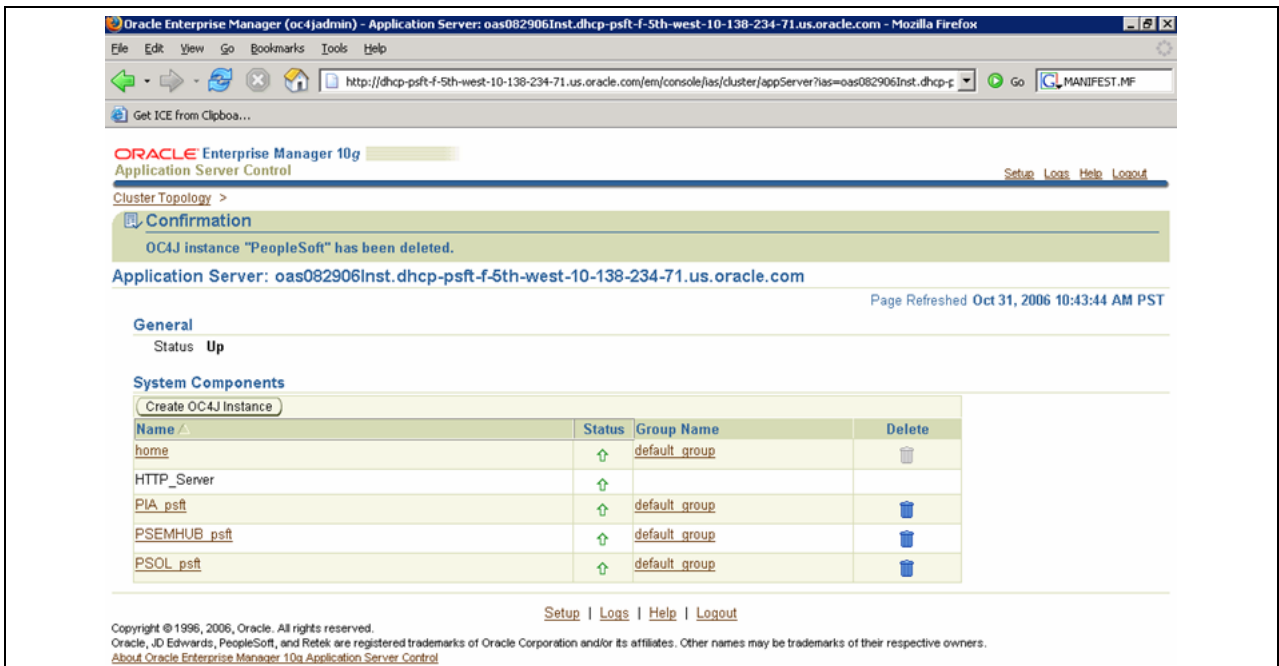


Selecting the Delete Icon for the OC4J component

- Click Yes.



The Delete Confirmation window



Deletion Confirmation window

- In the case of a Multiple Component install, repeat steps 4 and 5 for the other two OC4J components.

Note. VirtualHost entries corresponding to the deleted OC4J Components are not removed from the <OAS_HOME>\Apache\Apache\conf\mod_oc4j.conf file. These VirtualHost entries will be stale entries and will be removed in the ensuing PIA install

Using Command Line

Single Component

Stop the OC4J component and remove it. For example:

```
<OAS_HOME>\opmn\bin\opmnctl stopproc process-type=PeopleSoft
<OAS_HOME>\bin\removeinstance -instanceName PeopleSoft
```

Multiple Component

Example:

```
<OAS_HOME>\opmn\bin\opmnctl stopproc process-type=PIA_PeopleSoft  
<OAS_HOME>\opmn\bin\opmnctl stopproc process-type=PSOL_PeopleSoft  
<OAS_HOME>\opmn\bin\opmnctl stopproc process-type=PSEMHUB_PeopleSoft  
<OAS_HOME>\bin\removeinstance -instanceName PIA_PeopleSoft  
<OAS_HOME>\bin\removeinstance -instanceName PSOL_PeopleSoft  
<OAS_HOME>\bin\removeinstance -instanceName PSEMHUB_PeopleSoft
```

Task 9A-2: Installing the PeopleSoft Pure Internet Architecture on WebLogic in GUI Mode

This section describes how to install the PeopleSoft Pure Internet Architecture on WebLogic.

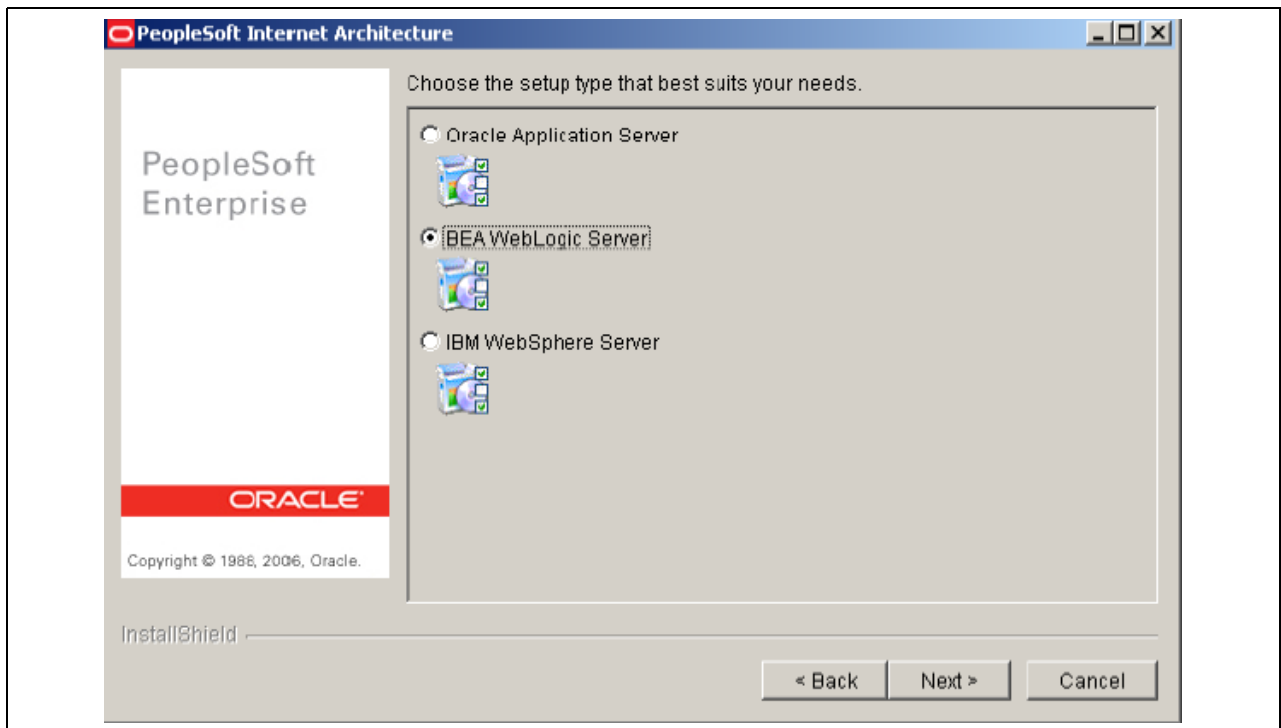
See “Installing Web Server Products,” Installing WebLogic.

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*, “Working with BEA WebLogic.”

Note. WebLogic 9.2 does not have any Service Packs released yet. An install of WebLogic 9.2 without any Service Pack works fine with PIA installation.

To install the PeopleSoft Pure Internet Architecture on WebLogic:

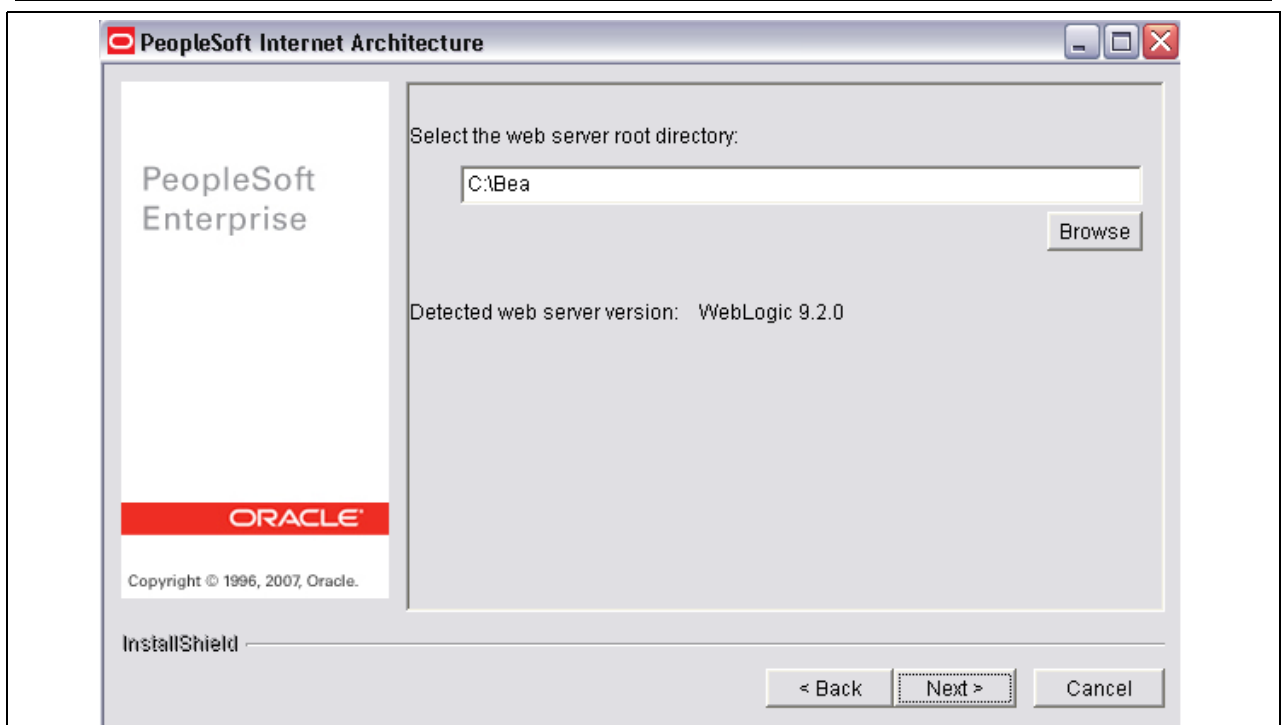
1. Go to <PS_HOME>\setup\PsmPiaInstall.
2. Run setup.exe.
3. Click Next in the Welcome screen.
4. Enter the same <PS_HOME> directory that you specified when running the PeopleTools Installer.
5. Choose BEA WebLogic Server and click Next.



Choosing the BEA WebLogic Server in the PeopleSoft Internet Architecture window

6. Specify the root directory where WebLogic is installed, and click Next.

Note. If you enter an incorrect path for WebLogic, you receive an error message “Detected web server version: no choices available.” Check that you have WebLogic installed, and in the designated directory.



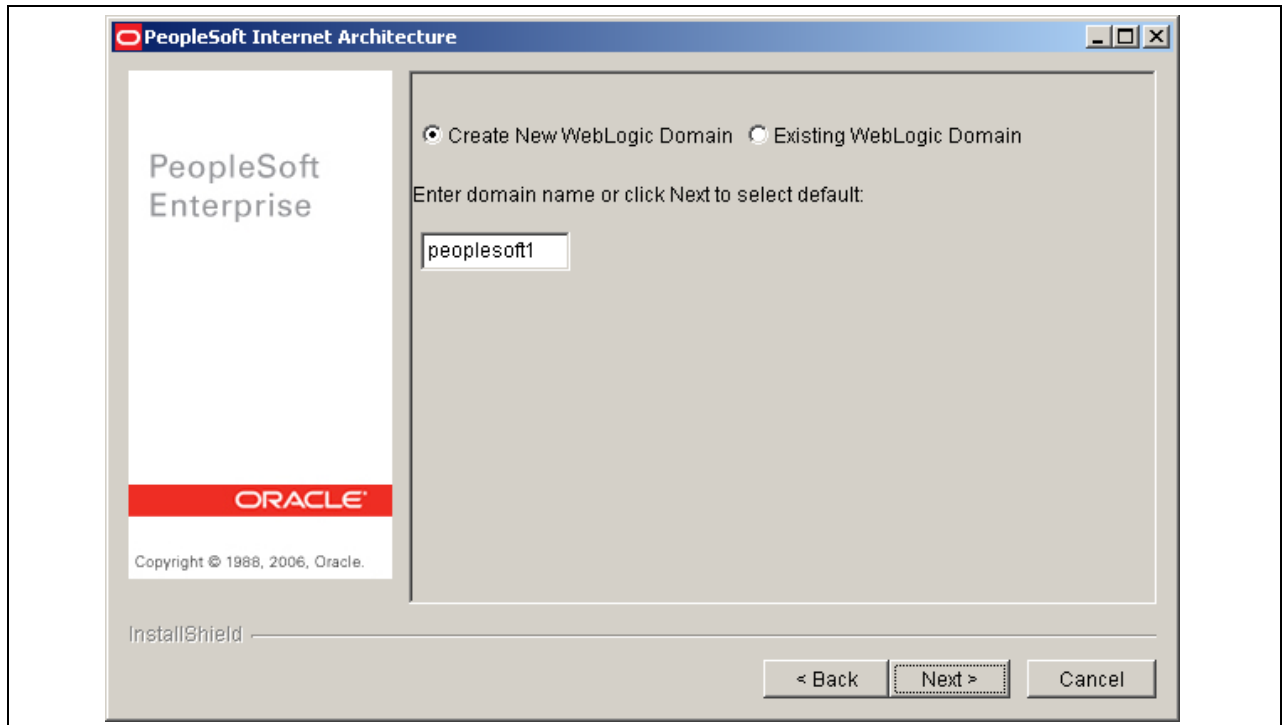
Specifying the root directory in the PeopleSoft Internet Architecture window

7. Enter the login ID and password for the new domain to be created.

Click Next to continue. The next window asks you to choose whether to create a new WebLogic domain or to use an existing domain

8. If you select Create New WebLogic Domain, the installation process automatically generates a valid domain name in the domain name field.

If you attempt to enter an invalid domain name, you see a prompt asking you to enter a new domain name or choose an existing domain.



Specifying a new WebLogic domain

9. If you select Existing WebLogic Domain, specify the domain name and select one of these options:

Note. You see the option Existing WebLogic Domain only if there is already a domain in <PS_HOME>.

Install additional PeopleSoft site

This option is relevant only to the PeopleSoft PORTAL web application, and does not modify or revert any other configuration settings. Select this option to install only the necessary files for defining an additional PeopleSoft site onto an existing WebLogic configuration. The new site will be accessed using its name in the URL. A site named “CRM” would be accessed using a URL similar to `http://mywebserver_machine/CRM`. To reset or re-create an existing PeopleSoft site, simply enter that site's name as the site to create. On your web server, a PeopleSoft site is comprised of the following directories within the PORTAL web application:

```
<WEBLOGIC_DOMAIN>\applications\peoplesoft\PORTAL\<site>\*
<WEBLOGIC_DOMAIN>\applications\peoplesoft\PORTAL\WEB-INF
\psftdocs\<site>\*
```

Redeploy PeopleSoft Internet Architecture

This selection affects all of the PeopleSoft Pure Internet Architecture web applications installed to the local WebLogic domain. Select this option to redeploy all of the class files and jar files that comprise web components of PeopleSoft Pure Internet Architecture. WebLogic Server

configuration files, scripts and any existing PeopleSoft (PORTAL) sites are not overwritten, unless you specify an existing PeopleSoft site during this setup.

Re-create WebLogic domain and redeploy PeopleSoft Internet Architecture

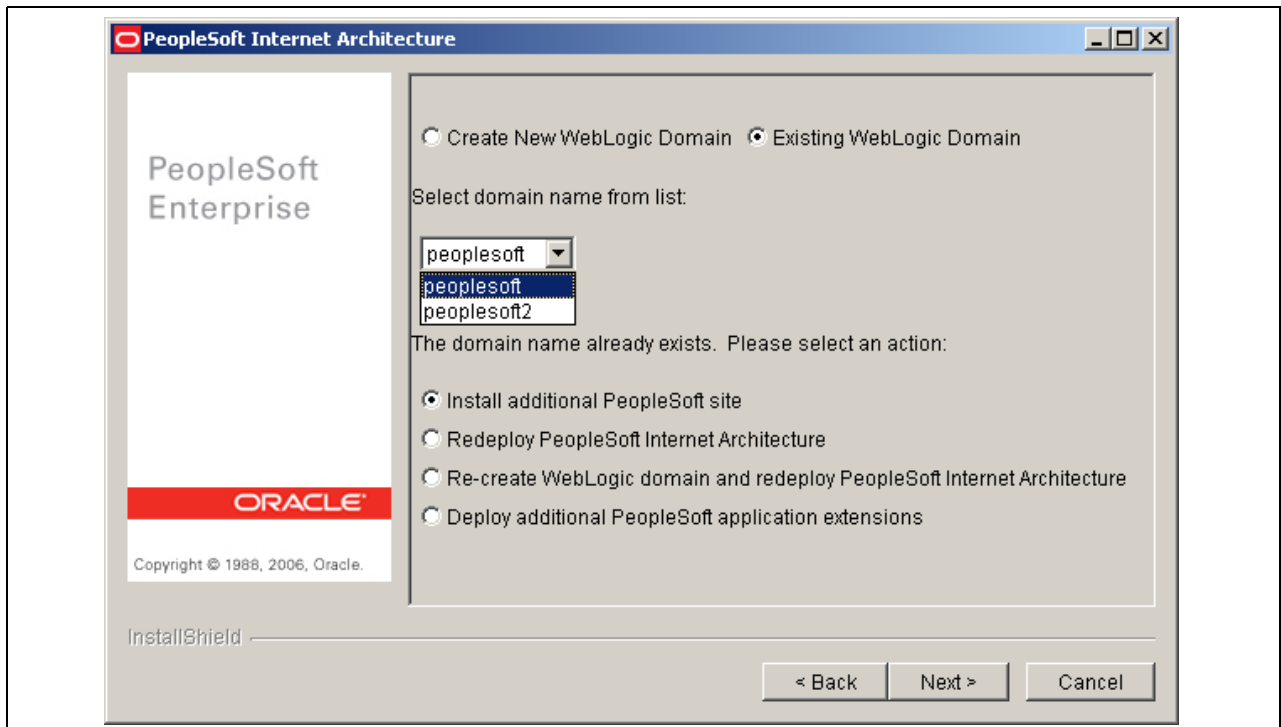
This option affects WebLogic Server configuration and all of the PeopleSoft Pure Internet Architecture web applications installed to the local WebLogic domain. Select this option to completely remove an existing WebLogic domain and create the newly specified PeopleSoft site.

Deploy additional PeopleSoft application extensions

This option is solely for use with PeopleSoft applications. PeopleSoft application extensions are provided with certain PeopleSoft applications, and this option allows you to deploy those extensions. Consult the installation documentation for your PeopleSoft application to see if this option is appropriate. PeopleTools does not use application extensions.

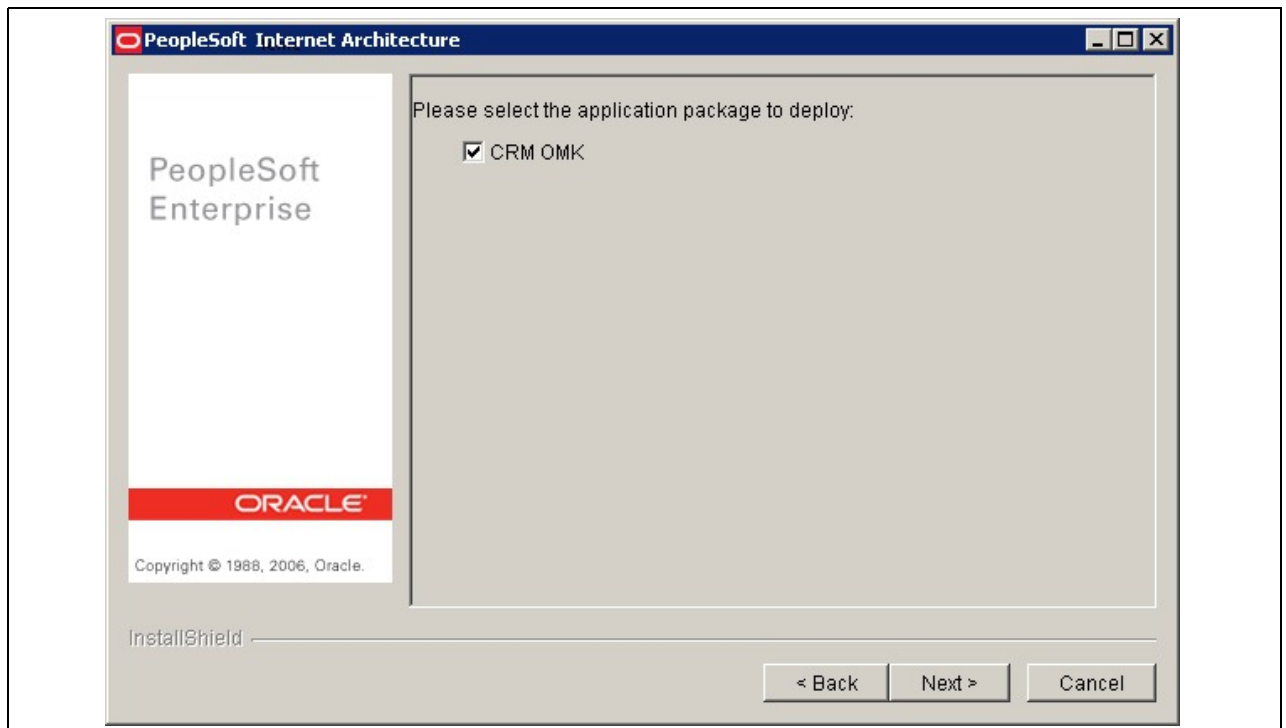
Warning! Re-creating an existing domain will delete everything previously installed into that domain, including PeopleBooks. If you choose to re-create—instead of redeploying—a domain, you may first want to back up your PeopleBooks <docroot> directory (typically, htmldoc) at the top level of the PeopleSoft Online Library (PSOL) web site. You can then restore it after the PeopleSoft Pure Internet Architecture installation.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.



Selecting an existing WebLogic domain

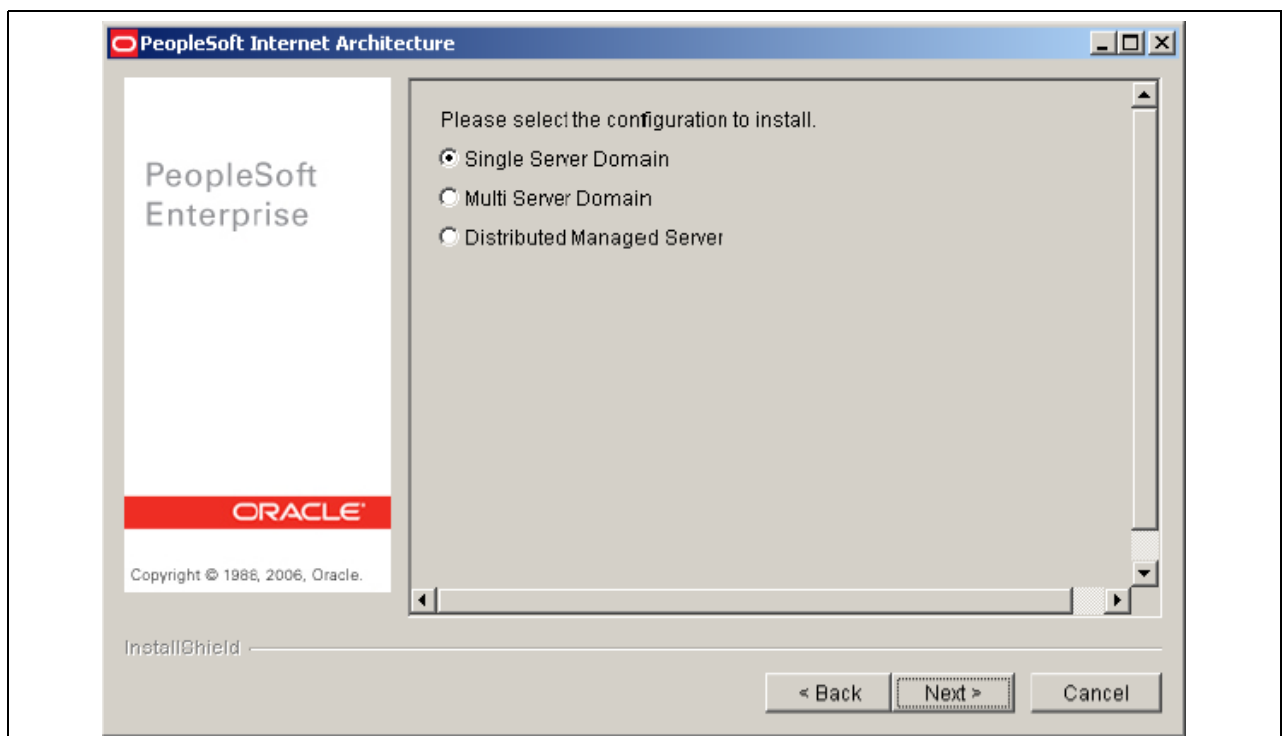
10. If there are application packages in the archives directory, you'll be asked whether you want to deploy them. (If you are using an existing domain, you'll only be prompted if you selected Deploy additional PeopleSoft extensions.)



Sample application package selection screen

11. Select the type of domain to create—single server, multi server, or distributed managed server.

Note. You must select "Multi Server Domain" if you plan to host PeopleBooks on the web server on which you are installing the PeopleSoft Pure Internet Architecture.



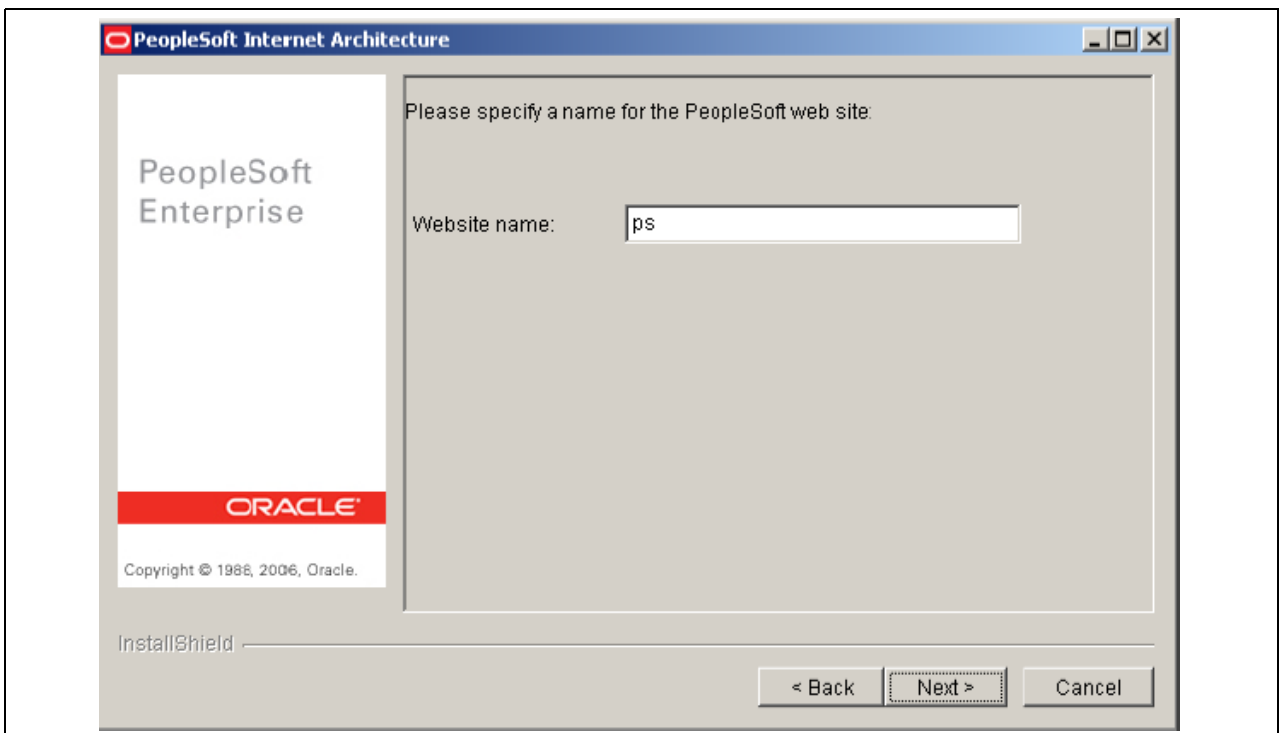
Choosing your domain type

There are three domain configuration options:

- *Single Server Domain*: This domain configuration contains one server named PIA, and the entire PeopleSoft enterprise application is deployed to it. This configuration is intended for single user or very small scale, nonproduction environments. This configuration is very similar to the WebLogic domain provided in PeopleTools 8.40 through 8.49.
- *Multi Server Domain*: This domain configuration contains seven unique server definitions, a WebLogic cluster, and the PeopleSoft Enterprise Application split across multiple servers. This configuration is intended for a production environment.
- *Distributed Managed Server*: This option is an extension of the *Multi Server Domain* selection and installs the necessary files to boot a managed server. This option requires a Multi Server installation to be performed to some other location, which will contain the configuration for this managed server.

12. Enter a PeopleSoft web site name; the default is ps.

Warning! The site name can include underscores (_), but an underscore cannot be followed by a numeric character or the string “newwin” (for example, my_site_3 or my_newwin_site).



Entering the PeopleSoft web site name

13. Specify your application server name, its JSL (Jolt Station Listener) port number, its HTTP and HTTPS port numbers, the Authentication Token Domain (optional), and click Next.

Note. For the AppServer name setting, enter the name of your application server. For the JSL port setting, enter the JSL port number you specified when setting up your application server. (The default value is 9000.)

See “Configuring the Application Server on <Windows or UNIX>.”

Specifying your application server name, your port numbers, and the authentication token domain

Note. The value you enter for Authentication Token Domain must match the value you specify when configuring your application server, as described earlier in this book. In addition, certain installation configurations require that you specify an authentication domain.

See Using Authentication Domains in the PeopleSoft Pure Internet Architecture Installation.

Note. If you enter a value for Authentication Token Domain, the URL to invoke PeopleSoft Pure Internet Architecture must include the network domain name in the URL. For example, if you do not enter an authentication domain, the URL to invoke PeopleSoft Pure Internet Architecture is `http://MachineName/ps/signon.html`. If you do enter a value for the authentication domain (for example, `.myCompany.com`), the URL to invoke PeopleSoft Pure Internet Architecture is `http://MachineName.myCompany.com/ps/signon.html`. In addition, if the web server for the database is using an http port other than the default port of 80, the URL must include the port number, for example `http://MachineName:8080/ps/signon.html` if there is no authentication domain, or `http://MachineName.myCompany.com:8080/ps/signon.html` if there is an authentication domain. The URL must also comply with the naming rules given earlier in this chapter.

See Understanding the PeopleSoft Pure Internet Architecture.

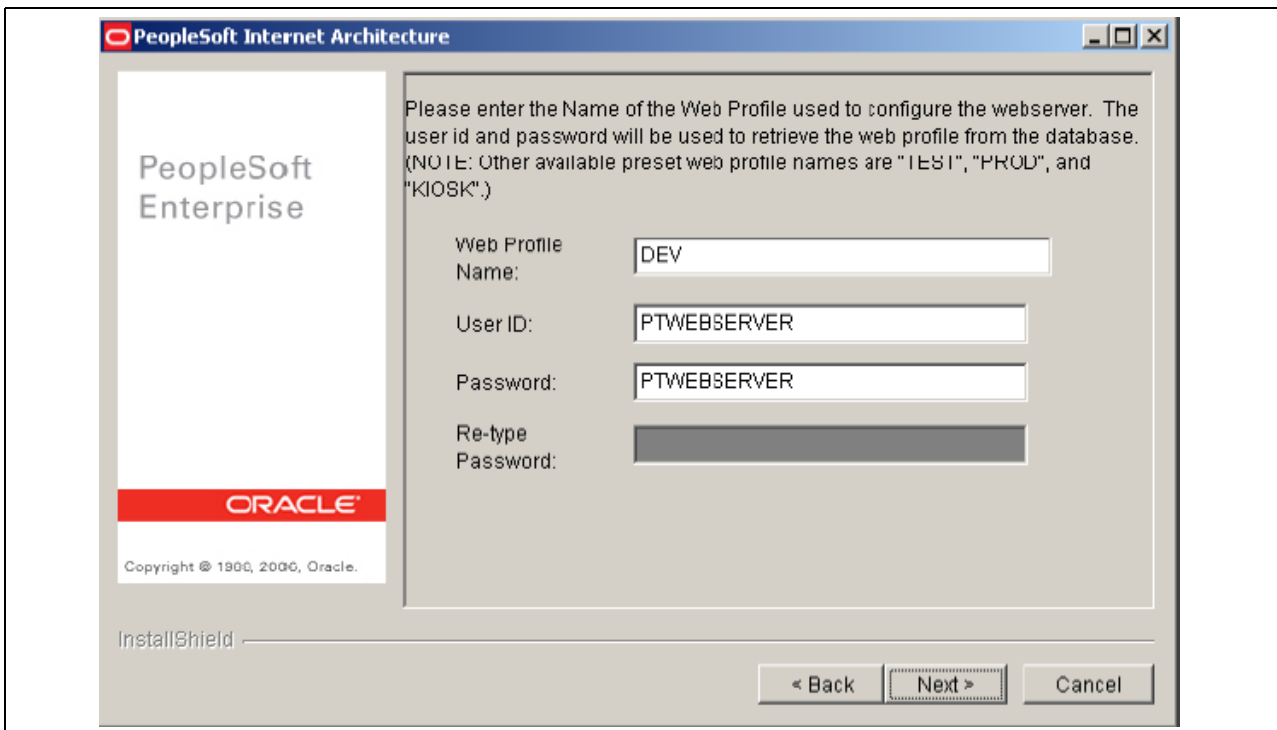
14. Enter the name of the web profile name in the database that will be used to configure this PeopleSoft web site.

This can be the name of either a predelivered one shown on the page, or one you intend to create yourself using PeopleTools, Web Profile Configuration, after logging in. Each site is configured according to the profile you specify here when it is first accessed after the web server is booted. The user ID and password will be used by the PIA servlets themselves at runtime to log in to the application server to retrieve the profile. For applications on PeopleTools 8.44 and above, PeopleSoft predelivers the PTWEBSERVER user ID for the purpose of configuring PIA servlets at runtime and running the Performance Monitor Agents.

You may have to unlock that user profile in certain application databases. If you have any problems logging in after starting the web server, refer to the application server domain logs.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.

Note. If you are upgrading your application database to PeopleTools 8.44 and above, you must set up the PTWEBSEVER user ID. Go to PeopleTools, Security, User Profiles, User Profiles. Click Add a New Value, enter PTWEBSEVER for User ID, and click Add. Enter and confirm a password, and enter a description. Enter the role *PeopleTools Web Server* and then click Save.



Entering a web profile name

15. Specify the root directory for the Report Repository (c:\psreports by default), and click Next. You can install to any location.

Note. For the Report Repository directory, specify the same directory that you specify as the Home Directory. Make sure that this directory is shared.

See "Setting Up Process Scheduler on Windows," Setting Up the Process Scheduler to Transfer Reports and Logs to Report Repository.

16. Verify all of your selections (click Back if you need to make any changes), and click Install to begin the installation.

An indicator appears showing the progress of your installation.

17. Click Finish to complete the installation.

The default installation directory is <PS_HOME>\webserv\<domain>\.

Note. If you are installing into an existing domain, you need to restart that domain.

Task 9A-3: Installing the PeopleSoft Pure Internet Architecture on WebSphere in GUI Mode

This section discusses:

- Prerequisites
- Installing the PeopleSoft Pure Internet Architecture on WebSphere
- Uninstalling the PeopleSoft Pure Internet Architecture from WebSphere

Prerequisites

The information in this section applies to the installation of PeopleSoft Pure Internet Architecture on a WebSphere Application Server.

Important! For more detailed WebSphere installation topics and Frequently Asked Questions (FAQs) refer to the PeopleSoft Customer Connection link <ftp://ftp.peoplesoft.com/outgoing/PTools/websphere/6103/>

Each WebSphere Application Server runs one PeopleSoft Pure Internet Architecture application. If you need to install more than one PeopleSoft Pure Internet Architecture application on your WebSphere Application Server, you must run PIA install again.

See Also

Installing Web Server Products, Installing WebSphere

Task 9A-3-1: Installing the PeopleSoft Pure Internet Architecture on WebSphere

Before installing the PeopleSoft Pure Internet Architecture (PIA) on WebSphere Application Server(WAS) , you must have installed the WAS software.

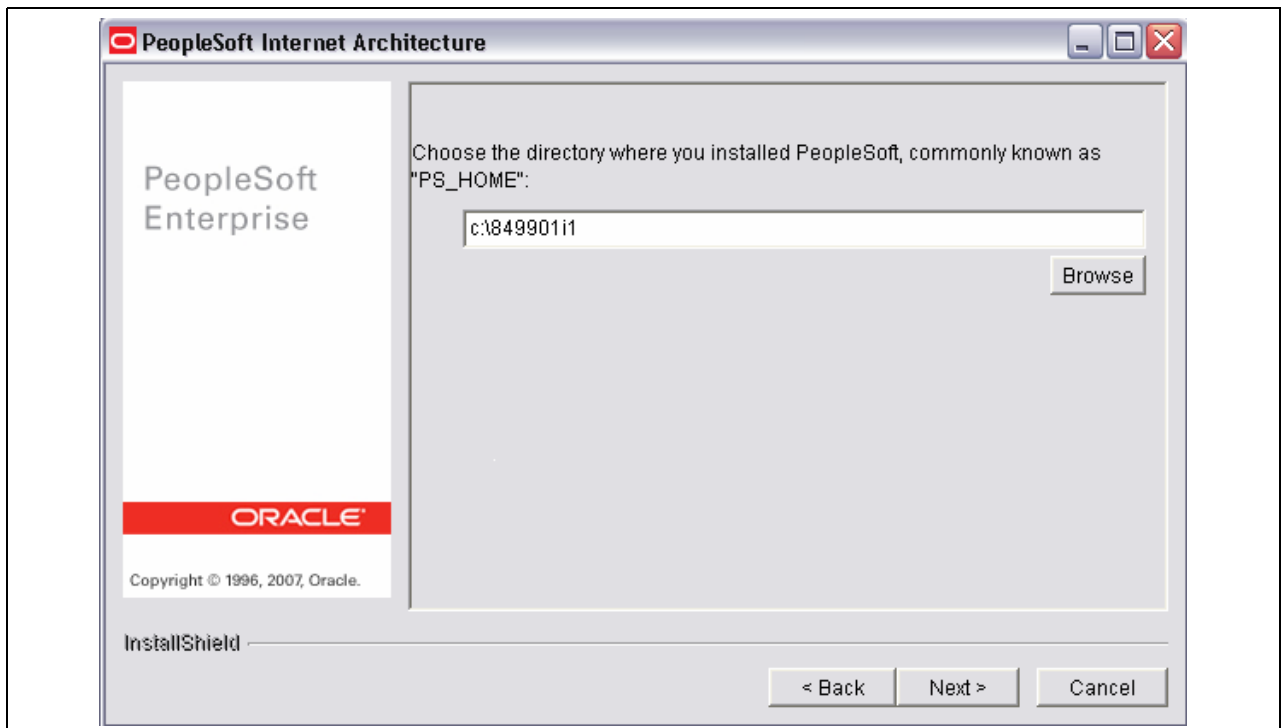
See Installing Web Server Products, Installing WebSphere Application Server.

When installing PIA on WAS, you must work with a local copy of the PIA installation software; you cannot install remotely. If you are doing the installation on a machine other than the one on which you installed PeopleTools, copy the <PS_HOME>\setup\PsmPPIAInstall directory to the local machine and keep the same directory structure.

Note. Both WebSphere Application Server Network Deployment and PeopleSoft Internet Application needs to be installed and deployed using the same user id. This restriction has been put forth in order to avoid any security and manage profile creation issues.

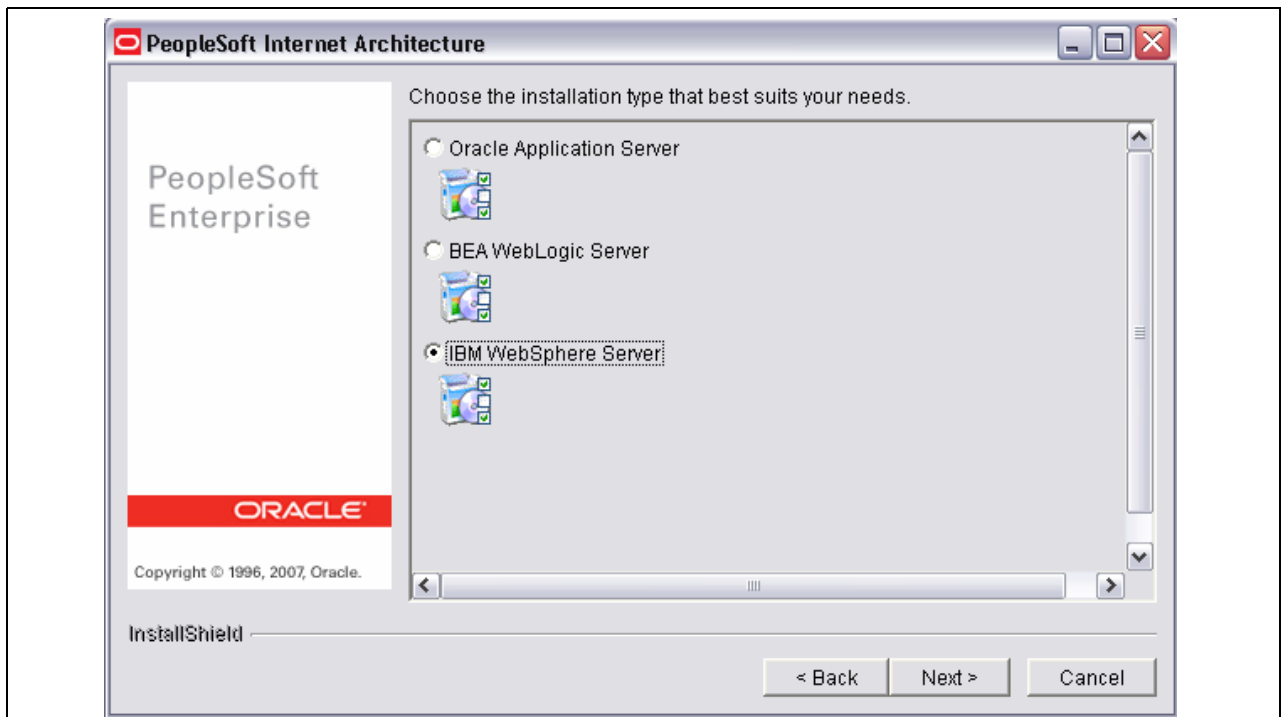
To install the PeopleSoft Pure Internet Architecture on WebSphere:

1. Go to <PS_HOME>\setup\PsmPPIAInstall.
2. Double-click on `setup.<OS>`.
The Welcome Screen appears.
3. Click Next in the Welcome screen, and choose the <PS_HOME> directory.



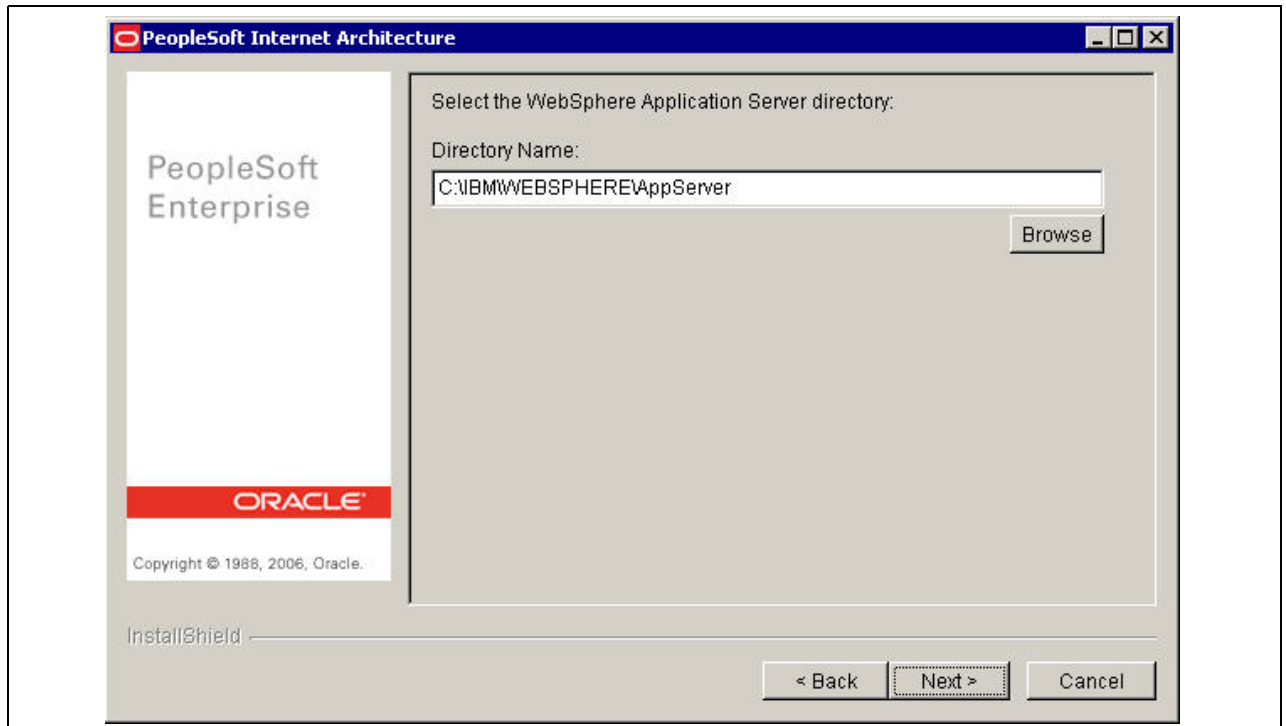
Choosing the PS_HOME directory

4. Choose IBM WebSphere Application Server and click Next.



choosing the IBM WebSphere Application Server

5. Specify the WebSphere 6.1 application server directory. Click Next.



Specifying the WebSphere application server directory

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*.

6. Choose whether to create a new WebSphere application (domain) or to use an existing application, and specify the name of the application. Enter an application name for this web server (for example, PeopleSoft) and select the type of server you want to install

Note. The name you specify for each PeopleSoft Enterprise Application must be unique for each WebSphere Node.

Note. You only see the option Existing WebSphere Application if there is already an application in <PS_HOME>.

If you select Create New WebSphere Application, the install automatically generates a valid application name in the application name field. If you attempt to enter an invalid application name, you'll be prompted to enter a new application name or choose an existing application.

If you select Existing WebSphere Application, you can choose from a drop-down list of existing applications, and can select whether to install an additional PeopleSoft site, redeploy PeopleSoft Pure Internet Architecture, or deploy additional PeopleSoft application extensions.

Note. Make sure the server is up and running before installing an additional PeopleSoft site, redeploying the PeopleSoft Pure Internet Architecture, or deploying additional PeopleSoft application extensions.

Install additional PeopleSoft site: Select this option to install only the necessary files for defining an additional PeopleSoft site onto the existing WAS web server configuration.

Redeploy PeopleSoft Internet Architecture: This selection affects all of the PeopleSoft Pure Internet Architecture web applications installed to the local WebSphere Application Server profile. Select this

option to redeploy PeopleSoft Enterprise Application that comprise web components of PeopleSoft Pure Internet Architecture.

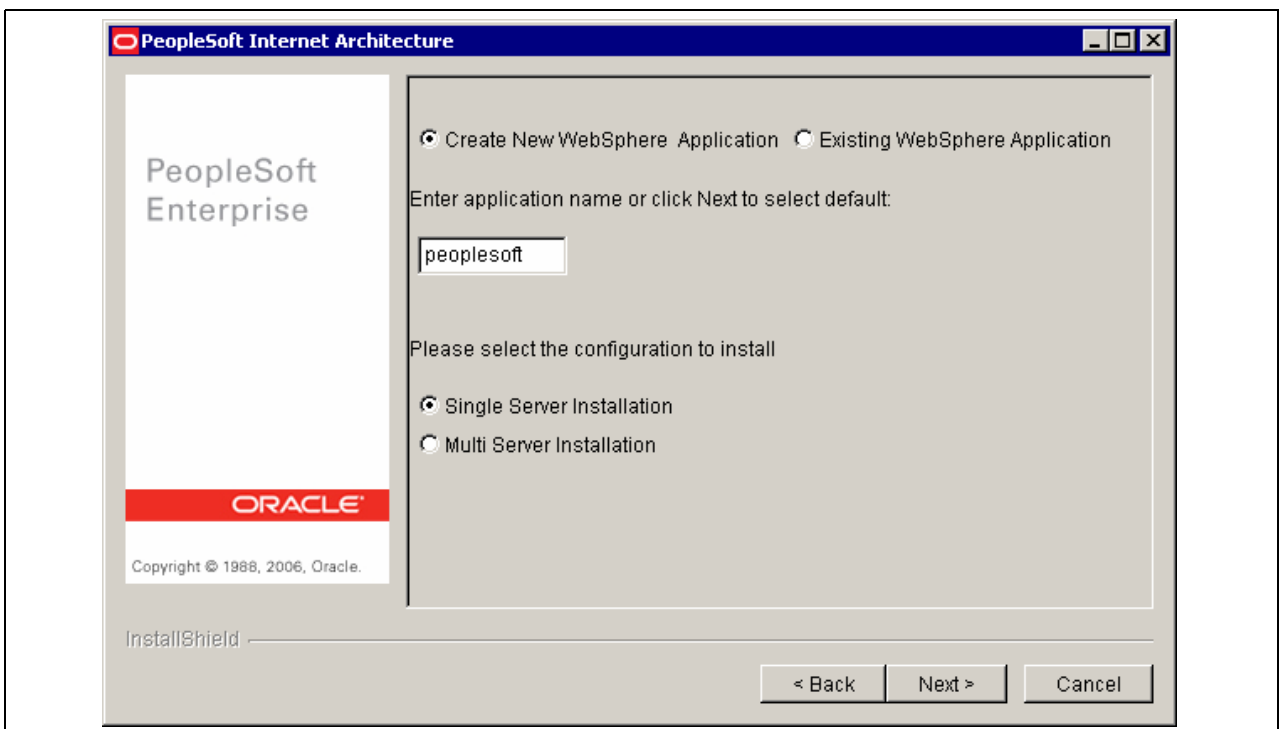
Deploy additional PeopleSoft application extensions: This option is solely for use with PeopleSoft product applications. PeopleSoft application extensions are provided with certain PeopleSoft applications, and this option allows you to deploy those extensions. Consult the installation documentation for your PeopleSoft application to see whether this option is appropriate. PeopleTools does not use application extensions.

This also gives you an option of whether you want to install single-server or multi-server installations.

Single-server installation: The Single Server Installation option creates one WebSphere Application Server profile to hold all the PeopleSoft web applications. The installer uses the Application Name you enter for the new profile's name.

Multi-server installation: The Multi Server Installation option splits the PeopleSoft web application into three WebSphere Application Server Profiles —PIA_<application_name>, PSOL_<application_name> (for the PeopleSoft Online Library) and PSEMHUB_<application_name> (for the PeopleSoft Environment Management Framework). Each profile has its own JVM, so the multiserver option will be better suited for installations needing higher performance or reliability. If you are not sure which to pick, choose Single.

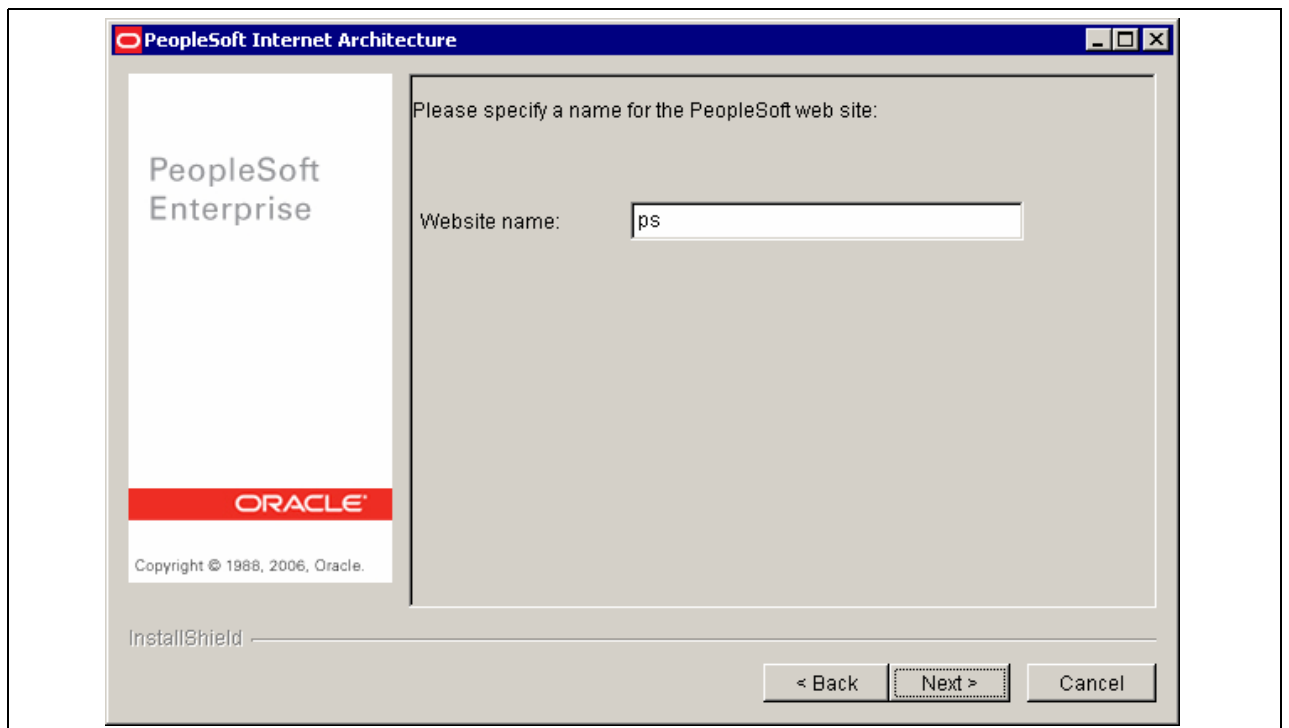
Note. You must select "Multi Server Installation" if you plan to host PeopleBooks on the web server on which you are installing the PeopleSoft Pure Internet Architecture.



Specifying a new WebSphere domain in a single server installation

7. . If there are application packages in the archives directory, you'll be asked whether you want to deploy them. (If you're using an existing domain, you'll only be prompted if you selected Deploy additional PeopleSoft extensions.)
8. EEnter a PeopleSoft web site name; the default is ps.

Warning! The site name can include underscores (_), but an underscore cannot be followed by a numeric character or the string “newwin” (for example, my_site_3 or my_newwin_site).



Entering the PeopleSoft web site name

9. Specify your application server name, its JSL (Jolt Station Listener) port number, its HTTP and HTTPS port numbers, the authentication token domain, and click Next.

Note. For the AppServer name setting, enter the name of your application server. For the JSL port setting, enter the JSL port number you specified when setting up your application server. (The default value is 9000.)

See “Configuring the Application Server on Windows.”

Note. The HTTP/HTTPS port numbers are reset to those that you just specified when you restart your WebSphere server.

Specifying your application server name, your port numbers, and the authentication token domain

Note. The value you enter for Authentication Token Domain must match the value you specify for the authentication domain when configuring your application server, as described earlier in this book. In addition, certain installation configurations require that you specify an authentication domain.

See Using Authentication Domains in the PeopleSoft Pure Internet Architecture Installation.

Note. If you enter a value for the Authentication Token Domain, the URL to invoke PeopleSoft Pure Internet Architecture must include the network domain name in the URL. For example, if you do not enter an authentication domain, the URL to invoke PeopleSoft Pure Internet Architecture is `http://MachineName:port/ps/signon.html`. If you do enter a value for the authentication domain (for example, `.myCompany.com`), the URL to invoke PeopleSoft Pure Internet Architecture is `http://MachineName.myCompany.com:port/ps/signon.html`. The URL must also comply with the naming rules given earlier in this chapter.

See “Understanding the PeopleSoft Pure Internet Architecture.”

In the case of Multi Server Installation type, http port and https ports can not be consequent numbers. The range for port number will be `<Port#>-<Port#>+2` for all the three application server profiles that the install creates. For example, if you select HTTP Port as 5555 and HTTPS port as 5560 then the ports are assigned as given below.

ProfileName	HTTP port Number	HTTPS port Number
PIA_<application_name>	5555	5560
PSEMHUB_<application_name>	5556	5561
PSOL_<application_name>	5557	5562

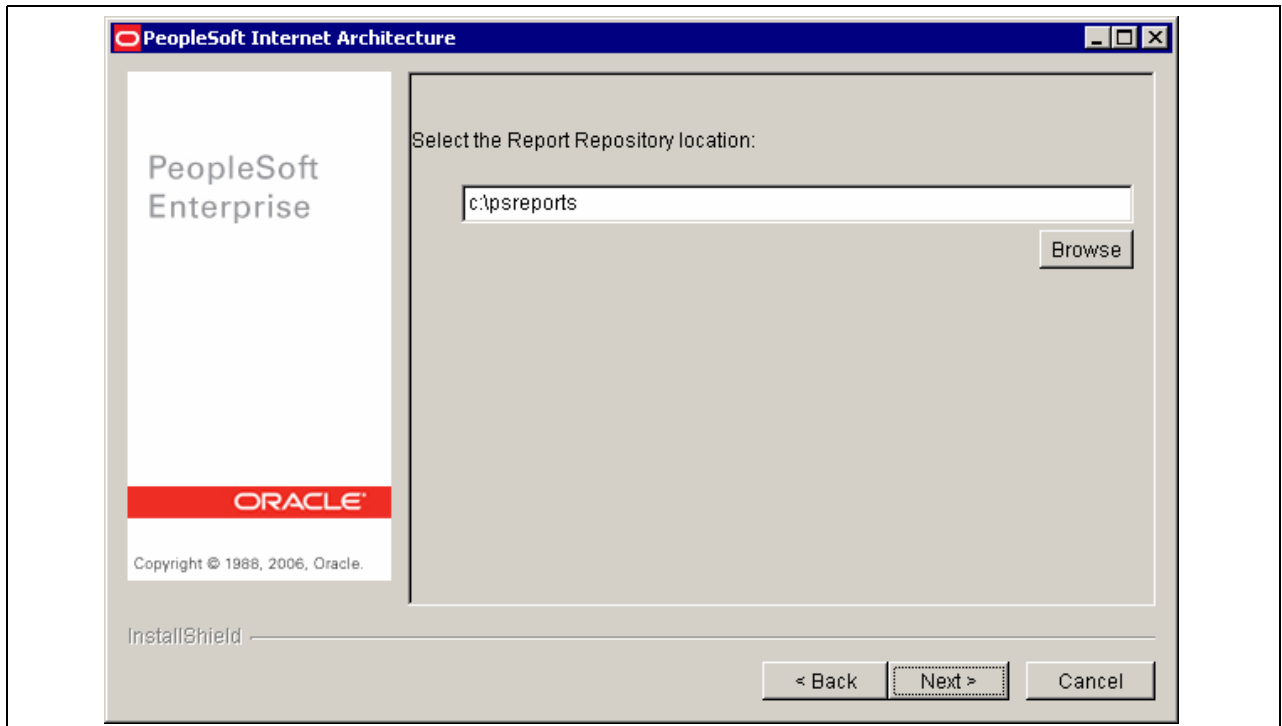
10. Enter the name of the web profile name in the database that will be used to configure this PeopleSoft web site. This can be the name of either a pre delivered one shown on the page, or one you intend to create yourself using PeopleTools, Web Profile Configuration, after logging in. Each site is configured according to the profile you specify here when it is first accessed after the web server is booted. The user ID and password will be used by the PIA servlets themselves at runtime to log in to the application server to retrieve the profile. For applications on PeopleTools 8.44 and above, PeopleSoft predelivers the PTWEBSEVER user ID for the purpose of configuring PIA servlets at runtime and running the Performance Monitor Agents. You may have to unlock that user profile in certain application databases. If you have any problems logging in after starting the web server, refer to the application server domain logs.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*

Entering a web profile

If you are upgrading your application database to PeopleTools 8.47 or later, you will need to set up the PTWEBSEVER user ID by doing the following:

- a. Go to PeopleTools->Security->User Profiles->User Profiles, click Add a New Value.
 - b. Enter PTWEBSEVER for User ID, and click Add.
 - c. Enter and confirm a password.
 - d. Enter a description, the role *PeopleTools Web Server* and then click Save.
11. Specify the root directory for the Report Repository (c:\psreports by default), and click Next. You can install to any location.

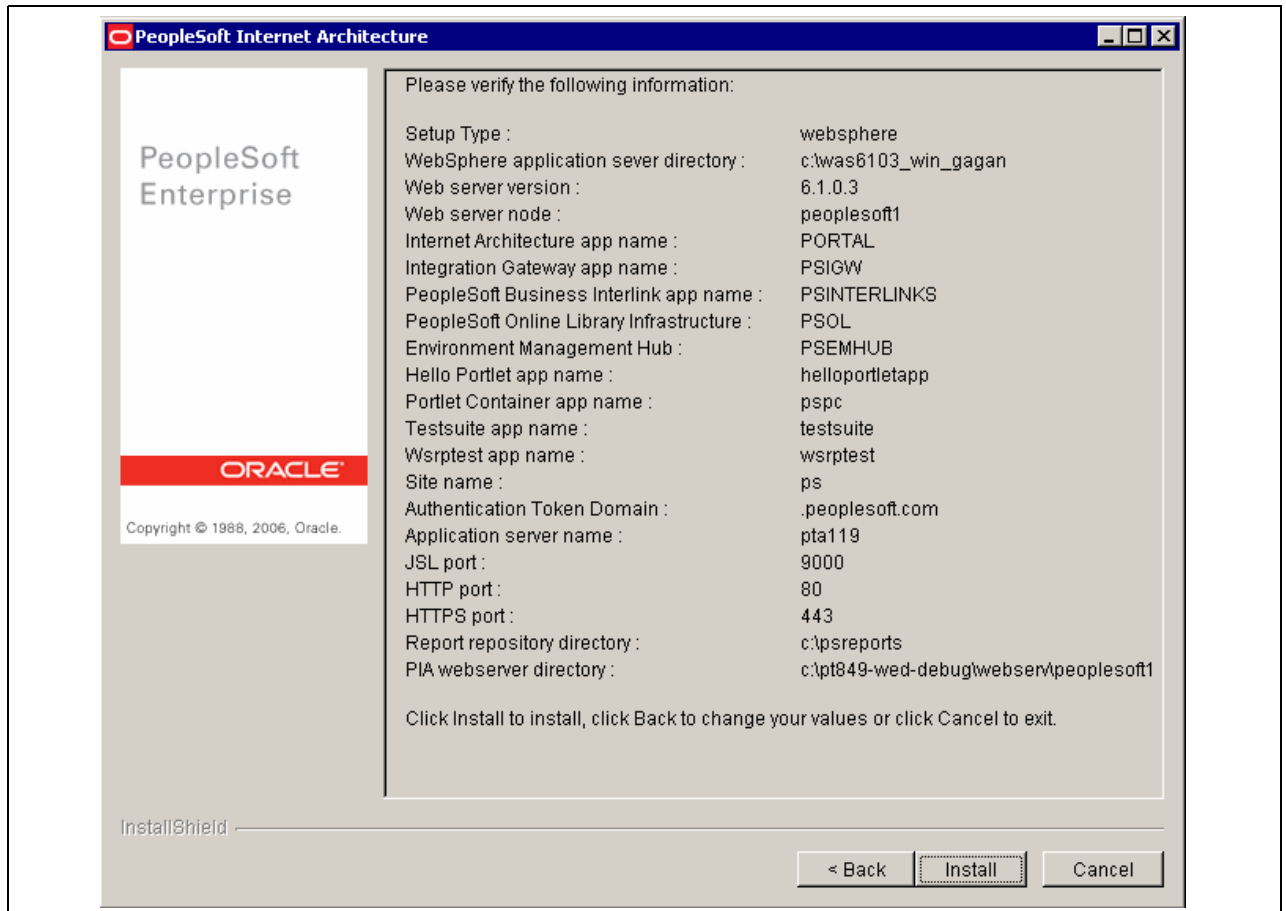


Specifying the report repository

Note. For the Report Repository directory, specify the same directory that you specify as the Home Directory. Make sure that this directory is shared.

See *Setting Up Process Scheduler on Windows Setting Up the Process Scheduler to Transfer Reports and Logs to Report Repository*.

12. Verify all your selections. Click Back if you need to make any changes and click Next to begin the installation. An indicator shows the progress of your installation.



Verifying Installation options window

- Click Finish to complete the installation. The default installation directory is <PS_HOME>\websevr \<profile-name>

Task 9A-3-2: Uninstalling the PeopleSoft Pure Internet Architecture from WebSphere

You cannot uninstall PeopleSoft Pure Internet Architecture simply by deleting <PS_HOME>\websevr \<profile-name>, without uninstalling it from WebSphere Administration Console. If you do so, the WebSphere registry becomes corrupt, and subsequent attempts to install PeopleSoft Pure Internet Architecture will fail. Instead, if necessary, you must uninstall PeopleSoft Pure Internet Architecture on WebSphere as described here:

To uninstall PeopleSoft Pure Internet Architecture on WebSphere:

- Open WebSphere Administration Console at <http://<machine-name>:9060/ibm/console>
- Log in as any user.
- Choose Applications, Enterprise Applications.
- Select the check boxes for the PeopleSoft Pure Internet Architecture applications you want to uninstall, and click Stop.
- Select the check boxes for the PeopleSoft Pure Internet Architecture applications you want to uninstall, and click Uninstall.
- Save your configuration.

7. Stop WebSphere server using the following commands:

On Windows:

```
<PS_HOME>\websrv\<profilename>\bin\stopServer.bat server1
```

On UNIX

```
<PS_HOME>\websrv\<profilename>\bin\stopServer.sh server1
```

8. In addition to uninstalling the application, you need to remove the WebSphere Application Server profile (that got created during PIA install) to complete the PIA uninstallation.

To uninstall profile run the following steps:

- a. Go to <PS_HOME>\websrv\<profilename>\bin

- b. Run the following command

On Windows:

```
manageprofiles.sh -delete -profileName <profilename>
```

On UNIX

```
manageprofiles.bat -delete -profileName <profilename>
```

where <profilename> indicates the application name that you have selected during the PIA install.

- c. Delete the directory <PS_HOME>\WebServ\<profile_name>

Task 9A-4: Testing the PeopleSoft Pure Internet Architecture Installation

This section discusses:

- Starting and Stopping Oracle Application Server
- Starting and Stopping WebLogic
- Starting and Stopping WebSphere Application Servers
- Accessing the PeopleSoft Signon
- Updating Database Information
- Updating PeopleTools Options

Note. After installing the PeopleSoft Pure Internet Architecture, you should make sure that your configuration is functional. You can test this by signing on to PeopleSoft, navigating within the menu structure, and accessing pages. (Make sure the application server is configured and booted.)

Task 9A-4-1: Starting and Stopping Oracle Application Server

There are several commands you can use to start and stop OAS and PIA, either separately or together.

Action	Command (full path)
Start PIA and other related processes	<OAS_HOME>\opmn\bin\opmnctl startall
Stop PIA and other related processes	<OAS_HOME>\opmn\bin\opmnctl stopall
View the status of the PIA installation on OAS	<OAS_HOME>\opmn\bin\opmnctl status
Start only PIA. In a single-component installation, <i>PIA_component</i> is the same as the application name entered during the installation of PIA on OAS. In a multi-component installation, <i>PIA_component</i> is a combination of the application name entered during the installation and the specific OC4J component type. The default name for the PIA component in a multi-component installation is <i>PIA_PeopleSoft</i>.	<pre><OAS_HOME>\opmn\bin\opmnctl.exe⇒ startproc ias-component=OC4J process⇒ type=PIA_component</pre>
Stop only PIA.	<pre><OAS_HOME>\opmn\bin\opmnctl.exe⇒ stopproc ias-component=OC4J process⇒ type=PIA_component</pre>

Task 9A-4-2: Starting and Stopping WebLogic

If you are using the WebLogic web server, you need to sign on to WebLogic. If you are using WebSphere instead, go on to the next procedure.

Note. Starting from WebLogic 9.2, all the Life cycle management scripts of server PIA and other batch scripts are located in <PS_HOME>\webserv\<domain_name>\bin folder.

To start WebLogic:

1. To start BEA WebLogic Server as a Windows service, install the server as a windows service using the following command in your WebLogic domain directory):

Single Server:

```
installNTservicePIA.cmd
```

Multi Server or Distributed Server:

```
installNTservice.cmd <ServerName>
```

The Windows service name will be *WebLogicDomain-WebLogicServer*. For example, to install server PIA as an NT service in a domain named peoplesoft, run `installNTservice.cmd PIA` and you will see "peoplesoft-PIA" as a service.

2. To start BEA WebLogic Server as a foreground process, execute the following command in your WebLogic domain directory (the default directory is <PS_HOME>\webserv\<domain_name>\bin):

Single Server:

```
startPIA.cmd (on Windows)
```

```
startPIA.sh (on UNIX)
```

Multi Server or Distributed Server:

```
startWebLogicAdmin.cmd (on Windows)
```

```
startWebLogicAdmin.sh (on UNIX)
```

and then

```
startManagedWebLogic.cmd <ManagedServerName> (on Windows)
```

```
startManagedWebLogic.sh <ManagedServerName> (on UNIX)
```

3. To stop the server, execute the following command in your WebLogic domain directory:

Single Server:

```
stopPIA.cmd (on Windows)
```

```
stopPIA.sh (on UNIX)
```

Multi Server or Distributed Server:

```
stopWebLogic.cmd [-url t3://ServerHostName:port | <ManagedServerName>] (on⇒  
Windows)
```

```
stopWebLogic.sh [-url t3://ServerHostName:port | <ManagedServerName>] (on UNIX)
```

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.

Task 9A-4-3: Starting and Stopping WebSphere Application Servers

By default, all of the servers of WAS instance are stopped when you install PIA. You need to start the server in order to access the PeopleSoft Enterprise Application.

To start WebSphere Application Server:

1. Change directories to the folder in which WebSphere Application Server profile is installed, which is the bin directory under the WebSphere home directory

```
<ps_home>\websrv\<profilename>\bin.
```

2. Enter the command

On Windows:

```
startServer.bat <server_name> -profileName <profilename>
```

where <profilename> indicates the application name that you have selected during the PIA install and <server_name> will be the server that gets created when the application server profile is created.

3. To stop the server, enter the command:

On Windows:

```
stopServer.bat <server_name> -profileName <profilename>
```

Task 9A-4-4: Accessing the PeopleSoft Signon

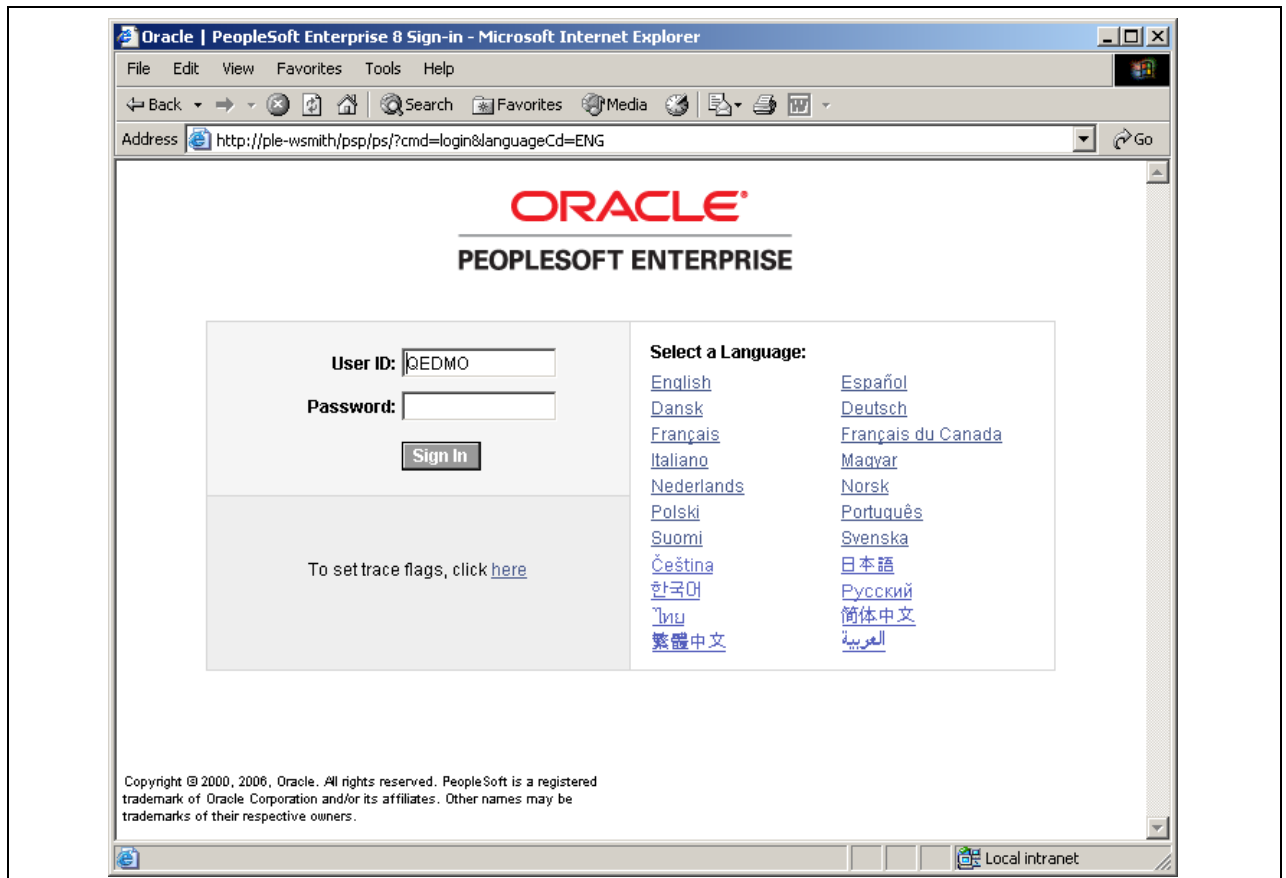
To access the PeopleSoft signon:

1. Open your web browser.
2. Enter the name of the site you want to access—for example (the default value for <site_name> is ps):

```
http://<machine_name>:<http_port>/<site_name>/signon.html
```


Note. PeopleSoft Pure Internet Architecture installed on WebSphere server listens at the HTTP/HTTPS ports specified during the PeopleSoft Pure Internet Architecture install. Invoke PeopleSoft Pure Internet Architecture through a browser by using the specified HTTP or HTTPS ports—that is, `http://<WebSphere_machine_name>:<server_port>/<site_name>/signon.html` (if AuthTokenDomain is not specified) or `http://<WebSphere_machine_name.mycompany.com>:<server_port>/<site_name>/signon.html` (if you specified .mycompany.com as the AuthTokenDomain).

This will take you to the signon screen corresponding to your browser's language preference.



Oracle PeopleSoft Enterprise Sign in window

Note. If you do not see the signon screen, check that you supplied all the correct variables and that your application server and the database server are running.

3. Sign in to the PeopleSoft system by entering a valid user ID and password.

Different applications use different default user IDs and passwords. For instance, for HRMS applications you enter PS for the user ID and the password. For Financials applications, you enter VP1 for the user ID and the password. Your application-specific install instructions contain any custom/delivered user IDs that you should use for the demonstration environment.

Note. The user ID and password are case sensitive. You need to enter the user ID and password using UPPERCASE.

Task 9A-4-5: Updating Database Information

The database information updated in this procedure is used by the PeopleSoft software update tools to identify your PeopleSoft database when searching for updates. These steps should be followed for all additional databases that you create to enable the accurate identification of your databases.

1. Sign on to your PeopleSoft database.
2. Navigate to PeopleTools, Utilities, Administration, PeopleTools Options.
3. Specify long and short names for your environment. For example:
 - Environment Long Name — Customer HR Demo Database
 - Environment Short Name — HR Demo DB
4. Select a system type from the drop-down list. For example, Demo Database.
5. Save your changes.

Task 9A-4-6: Updating PeopleTools Options

You can set the following options on the PeopleTools Options page:

- Multi-Currency — Check this box if you plan to use currency conversion.
See Enterprise PeopleTools 8.49 PeopleBook: Global Technology, “Controlling Currency Display Format.”
- Base Time Zone — Check this box to set the base time zone for your PeopleTools database.
See Enterprise PeopleTools 8.49 PeopleBook: Global Technology “Setting and Maintaining Time Zones.”
- Data Field Length Checking Flag — Check this box if you are using a Japanese EBCDIC (DB2 MBCS) or Japanese Shift-JIS (MBCS) database.
See Enterprise PeopleTools 8.49 PeopleBook: Global Technology, “Selecting and Configuring Character Sets and Language Input and Output.”
- Sort Order Option — If you specified a non-binary sort order for your database, choose the Sort Order Option that most closely approximates your database sort order.
See Enterprise PeopleTools 8.49 PeopleBook: Global Technology, “Sorting in PeopleTools.”

CHAPTER 9B

Setting Up the PeopleSoft Pure Internet Architecture in Console Mode

This chapter discusses:

- Understanding PeopleSoft Pure Internet Architecture
- Using Authentication Domains in the PeopleSoft Pure Internet Architecture Installation
- Installing the PeopleSoft Pure Internet Architecture on Oracle Application Server in Console Mode
- Installing the PeopleSoft Pure Internet Architecture on WebLogic in Console Mode
- Installing the PeopleSoft Pure Internet Architecture on WebSphere in Console Mode
- Testing the PeopleSoft Pure Internet Architecture Installation

Understanding PeopleSoft Pure Internet Architecture

This chapter explains how to install and configure the components of the PeopleSoft Pure Internet Architecture in console mode. It includes instructions for installing the PeopleSoft files on Oracle Application Server (OAS), WebLogic, and WebSphere. Only complete the instructions for the web server product that you installed.

Note. The console mode installation is typically used on UNIX platforms.

See “Installing Web Server Products.”

The setup program for the PeopleSoft Pure Internet Architecture is installed to the web server machine when you run the PeopleSoft Installer and select the PeopleSoft Web Server option.

See “Using the PeopleSoft Installer.”

PeopleSoft only supports customer installations that use the version of the web servers packaged with PeopleTools. *You must install the web server before you install the PeopleSoft Pure Internet Architecture.* Before you install the PeopleSoft Pure Internet Architecture, you must also have configured an application server, as described in the previous chapter.

Before performing the steps in this chapter, verify that Sun’s international version of JRE version 1.5.0 or higher is properly installed on the system and its path is in the system’s environment variable PATH.

If your web server is on a different machine than your application server, you need to make sure you have JRE installed on your web server to run the PIA installation.

The initial PIA setup automatically creates the default PeopleSoft site named *ps*. In subsequent PIA setups, change the site name from *ps* to a unique value. We recommend using the database name. This is handy for easy identification and ensures that the database web server files are installed in a unique web site.

The URL that you use to invoke PIA must conform to ASN.1 specifications. That is, it may contain only alphanumeric characters, dots ("."), or dashes ("-"). The URL must not begin or end with a dot or dash, or contain consecutive dots (".."). If the URL includes more than one portion, separated by dots, do not use a number to begin a segment if the other segments contain letters. For example, "mycompany.second.country.com" is correct, but "mycompany.2nd.country.com" is wrong.

Note. If you want to connect between multiple application databases, you need to implement single signon.

Note. If the PeopleSoft Pure Internet Architecture installation encounters an error, it will indicate which log files to refer to.

See “Installing Web Server Products.”

Note. The machine on which you run the PeopleSoft Pure Internet Architecture install must be running in *256 color mode*. This is not necessary for console mode.

Note. If you encounter the error message “No Matching JVM,” you need to specify the location of the Java Runtime Environment (JRE) to the installer using the `-is:javahome` command line parameter; for example: `/PA84206/setup.<OS> -is:javaconsole -console -is:tempdir<tempdir> -is:javahome <jredir>`.

The PeopleSoft Pure Internet Architecture installation includes the following products:

- *PeopleSoft Pure Internet Architecture.* This product is the centerpiece of the PeopleSoft architecture that enables users to work on a machine with only a supported browser installed. This option installs the servlets required for deploying PeopleSoft Applications and for the PeopleSoft Portal. The portal packs and Enterprise Portal have their own installation instructions, which are available on Customer Connection. For an overview of the various types of portals, consult the following.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.

- *PeopleSoft Report Repository.* This product works in conjunction with Process Scheduler to allow report distribution over the web.
- *PeopleSoft Integration Gateway.* This product is the entry and exit point for all messages to and from the Integration Broker. Its Java-based Connector architecture allows asynchronous and synchronous messages to be sent over a variety of standard protocols, many that are delivered at install, or through custom connectors.
- *PeopleSoft CTI Console.* This product works in conjunction with CTI vendor software to enable call center agents to take advantage of browser based teleset management and automatic population of application pages with relevant data associated with incoming calls, such as customer or case details.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft MultiChannel Framework*.

- *PeopleSoft Sync Server Gateway.* The Sync Server is a specialized application server optimized for concurrent multi-user synchronization processing in support of PeopleTools Mobile Agent. The web server-based Sync Gateway routes synchronization requests and messages to and from the appropriate Sync Server.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Mobile Agent*.

- *Environment Management Hub.* The Environment Management hub is a web application that is installed with the PeopleSoft Pure Internet Architecture and portal. It is started along with the rest of the web

applications when the user boots the web server. You cannot start the Environment Management Hub on a server that is configured to run HTTPS; in other words, if you plan to run Environment Management, your PIA server needs to be configured in HTTP mode.

See *Enterprise PeopleTools 8.49 PeopleBook: Software Updates*.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Security Administration

Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration

“Installing PeopleSoft Plug-in for Oracle Enterprise Manager”

Using Authentication Domains in the PeopleSoft Pure Internet Architecture Installation

You have the option to specify an authentication domain when you install the PeopleSoft Pure Internet Architecture on OAS, WebLogic, or WebSphere.

Note. The authentication domain was referred to as the Authentication Token Domain in previous releases, and that term is still seen in the software.

When an authentication domain is specified during the PeopleSoft Pure Internet Architecture install, that value gets used as the Cookie domain in the web server configuration. The main requirements when setting a cookie domain are:

- The host must have a fully qualified domain name (FQDN). The requirement that you must have a domain name does not imply that you must have a DNS, but you do need some type of naming service such as DNS or some managed `../etc/hosts` file that contains a list of the servers with their domain name.
- The cookie domain value being set must begin with a dot (`.ps.com` is valid, `ps.com` is NOT valid).
- The cookie domain value being set must contain at least 1 embedded dot (`.ps.com` is valid, `.corp.ps.com` is valid, `.com` is NOT valid).
- The cookie domain value can only be a single domain name. It cannot be a delimiter-separated list of domains.

By default, the browser only sends cookies back to the machine that set the cookie. So if web server `crm.yourdomain.com` sets a cookie, the browser will only send it back there. You can make the browser send the single signon cookie to all servers at `yourdomain.com` by typing your domain name in the Authentication Token Domain list box of web server `crm`.

Specifying the authentication domain may be necessary in certain cases. For example, if you plan to use the PeopleSoft portal technology, be sure to read the supporting documentation to determine whether setting the authentication domain is required for correct operation.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*, “Configuring the Portal Environment.”

Specify an authentication domain if you plan to run a REN Server. REN Servers are required for PeopleSoft MultiChannel Framework, Reporting, and some PeopleSoft CRM applications supported by PeopleSoft MultiChannel Framework.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft MultiChannel Framework*.

Specify an authentication domain if you plan to use Business Objects Enterprise.

See “Installing and Configuring Software for Crystal Reports,” Installing BusinessObjects Enterprise XI.

Task 9B-1: Installing the PeopleSoft Pure Internet Architecture on Oracle Application Server in Console Mode

This section discusses:

- Installing the PeopleSoft Pure Internet Architecture on Oracle Application Server
- Uninstalling the PeopleSoft Pure Internet Architecture from Oracle Application Server

Note. The installation of the PeopleSoft Pure Internet Architecture on Oracle Application Server includes the PeopleSoft Provider. Use this to configure PeopleSoft portlets on Oracle Portal pages.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*, “Deploying PeopleSoft Portlets on Oracle Portal Pages.”

Task 9B-1-1: Installing the PeopleSoft Pure Internet Architecture on Oracle Application Server

Before you begin the installation of the PeopleSoft Pure Internet Architecture (PIA) on Oracle Application Server (OAS), you must have installed the OAS software as described previously.

See “Installing Web Server Products,” Installing Oracle Application Server.

When installing PIA on OAS, you must work with a local copy of the PIA installation software; you cannot install remotely. If you are doing the installation on a machine other than the one on which you installed PeopleTools, copy the <PS_HOME>/setup/PsMpPIAInstall directory to the local machine.

To install the PeopleSoft Pure Internet Architecture on Oracle Application Server do the following steps

Note. You must install PIA with the same user who installed OAS.

1. Start opmn process if necessary.

To check the status of the opmn process run this command:

```
<OAS_HOME>/opmn/bin/opmnctl status
```

If you get the response, “Unable to connect to opmn”, start it by running this command:

```
<OAS_HOME>/opmn/bin/opmnctl start
```

See “Installing Web Server Products,” Installing Oracle Application Server.

2. Check whether the following processes are running by opmnctl status

HTTP_Server and OC4J_Home

If the above processes are not running start the processes by issuing

```
<OAS_HOME>\opmn\bin\opmnctl startproc process-type=HTTP_Server
<OAS_HOME>\opmn\bin\opmnctl startproc process-type=home
```

3. Change directory to `<PS_HOME>/setup/PsMpPIAInstall` and run one of these commands:

```
setup.exe -console
```

or

```
<JAVA_HOME>/bin/java -cp setup.jar run -console
```

where `<JAVA_HOME>` is the directory where the JRE software is installed. The default is `<PS_HOME>/jre`.

See “Using the PeopleSoft Installer,” Prerequisites.

A welcome message appears.

4. Select Enter to continue.
5. Enter the `<PS_HOME>` directory, where you installed the PeopleSoft software.
6. At the prompt:

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

Press ENTER to select the default selection *1*, for the Oracle Application Server.

7. At the prompt:

Enter the directory where you installed OAS, or press ENTER to accept the default

At the prompt:

Please enter the login and password for OC4j admin.

Note. Password should be a minimum of 8 characters and at least one character should be numeric. This should be the same user name and password as given while installing OAS.

User:

[oc4jadmin]

Password:

:

Re-type Password:

:

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

8. Enter an application name for this web server.
9. Select the type of server you want to install, and press ENTER to continue:

Select the server install type:

```
[X] 1 - Single Component Server
[ ] 2 - Multi Component Server
```

The *Single Component Server* option creates one OC4J component to hold all the PeopleSoft web applications. The Application Name you enter in the next step is used for the new component's name.

The *Multi Component Server* option splits the PeopleSoft web application into three OC4J components—`PIA_<application_name>`, `PSOL_<application_name>`, and `PSEMFHUB_<application_name>`. Each OC4J component has its own JVM so the multi component

option is better suited for installations needing higher performance or reliability. If you are not sure which to pick, choose Single.

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*, “Working with Oracle Application Server 10g.”

10. If you enter a new name, for example, peoplesoft, press ENTER.

Skip the next two steps, and continue with step 13.

11. If the name you enter belongs to an OAS web application that already exists, for example, *jwong_single*, select one of the options below and press ENTER to continue:

The PeopleSoft application "jwong_single" already exists.

Select from the following:

- [X] 1 - Create an additional site in the existing application
- [] 2 - Deploy additional PeopleSoft application extensions
- [] 3 - Go back to enter a new application name

Note. To redeploy PIA on OAS, you must remove the OC4J component(s) and perform a fresh installation of PIA. Use Application Server Control or `demctl` commands to remove the OC4J component(s). Note that any customizations done after the PIA install needs to be done again.

- *Create an additional site in the existing application:* Select this option to install only the necessary files for defining an additional PeopleSoft site on the existing OAS web server configuration.
- *Deploy additional PeopleSoft application extensions:* This option is solely for use with PeopleSoft product applications. PeopleSoft application extensions are provided with certain PeopleSoft applications, and this option allow you to deploy those extensions. Consult the installation documentation for your PeopleSoft application to see whether this option is appropriate. PeopleTools does not use application extensions.
- *Go back to enter a new application name:* Select this option to return to the previous screen.

12. If you select the option Deploy additional PeopleSoft application extension, select the application packages you want to deploy:

[X] 1 -EMP PeopleSoft Activity Based Mgmt

13. Enter a web site name; the default is ps.

14. Specify the application server name, its JSL (Jolt Station Listener) port number, its HTTP and HTTPS port numbers, and the authentication token domain (optional):

Enter port numbers and summaries.

AppServer name: [<App Server Machine Name>]

JSL Port: [9000]

HTTP Port: [8000]

HTTPS Port: [4430]

Authentication Token Domain: (optional) []

AppServer name Enter the name of your application server machine.

JSL Port Enter the JSL port number you specified when setting up the application server (the default is 9000).

HTTP/HTTPS

The default HTTP/HTTPS ports of the Oracle HTTP Server (OHS) are 80/443 for Windows and 7777/4443 for UNIX/Linux. However, you should enter different HTTP/HTTPS port values at this point for the PIA installation. Please use any unused port other than 80/443 for Windows and 7777/4443 for UNIX/Linux. The PIA installation may fail or may not work properly if you enter the same HTTP/HTTPS ports for the PIA installation as the default OHS ports.

To access PIA, specify a URL with either the default OHS port values, or the port values you enter here for PIA. For example, `http://<machine_name>:<port_number>/<site_name>/signon.html`.

For Multi Component Server, the HTTP/HTTPS ports that you enter here correspond to the OC4J component `PIA_<application_name>`.

Authentication Token Domain

The value you enter for Authentication Token Domain must match the value you specify for the authentication domain when configuring your application server. In addition, certain installation configurations require that you specify an authentication domain.

See Using Authentication Domains in the PeopleSoft Pure Internet Architecture Installation.

Note. If you enter a value for the Authentication Token Domain, the URL to invoke PeopleSoft Pure Internet Architecture must include the network domain name in the URL. For example, if you do not enter an authentication domain, the URL to invoke PeopleSoft Pure Internet Architecture is `http://MachineName/ps/signon.html`. If you do enter a value for authentication domain (for example, `.myCompany.com`), the URL to invoke PeopleSoft Pure Internet Architecture is `http://MachineName.myCompany.com/ps/signon.html`. In addition, if the web server for the database is using an http port other than the default port of 80, the URL must include the port number, for example `http://MachineName:8080/ps/signon.html` if there is no authentication domain, or `http://MachineName.myCompany.com:8080/ps/signon.html` if there is an authentication domain. The URL must also comply with the naming rules given earlier in this chapter.

See Understanding the PeopleSoft Pure Internet Architecture

15. Enter the name of the web profile in the database that will be used to configure this PeopleSoft web site. This can either be the predelivered name as shown on the page, or one that you intend to create yourself using PeopleTools, Web Profile Configuration after logging in. Each site is configured according to the profile you specify here when it is first accessed after the web server is booted. The user ID and password will be used by the PIA servlets themselves at runtime to log in to the application server to retrieve the profile. For applications on PeopleTools 8.44 and above, PeopleSoft predelivers the PTWEBSEVER user ID for the purpose of configuring PIA servlets at runtime and running the Performance Monitor Agents. You may have to unlock that user profile in certain application databases. If you have any problems logging in after starting the web server, refer to the application server domain logs.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.

Note. If you are upgrading your application database to PeopleTools 8.44 and above, you must set up the PTWEBSEVER user ID. Go to PeopleTools, Security, User Profiles, User Profiles. Click Add a New Value, enter PTWEBSEVER for User ID, and click Add. Enter and confirm a password, and enter a description. Enter the role PeopleTools Web Server and then click Save.

16. Specify the root directory for the Report Repository (`c:\psreports` by default). You can install to any location.

Note. For the Report Repository directory, specify the same directory that you specify as the Home Directory. Make sure that this directory is shared. See "Setting Up Process Scheduler," Setting Up the Process Scheduler to Transfer Reports and Logs to Report Repository.

17. Verify your selection and press ENTER to start the installation.

You see an indicator showing the progress of the installation.

18. When the installation is complete, exit from the console window.

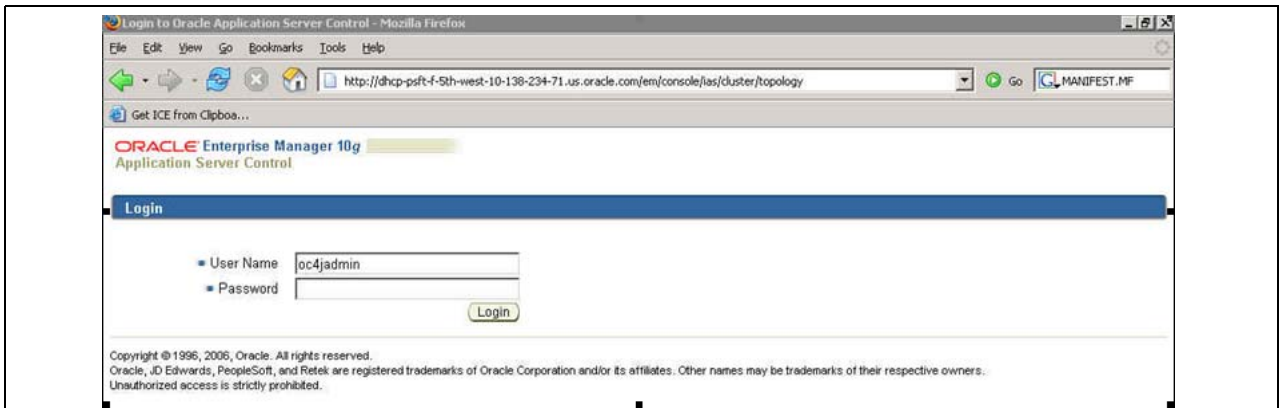
The default installation directory is <OAS_HOME>/j2ee/<component>/applications/<application>.

Task 9B-1-2: Uninstalling the PeopleSoft Pure Internet Architecture from Oracle Application Server

PIA is installed on OAS as an OC4J component. To uninstall PIA, stop the OC4J component(s) and then remove the OC4J component(s).

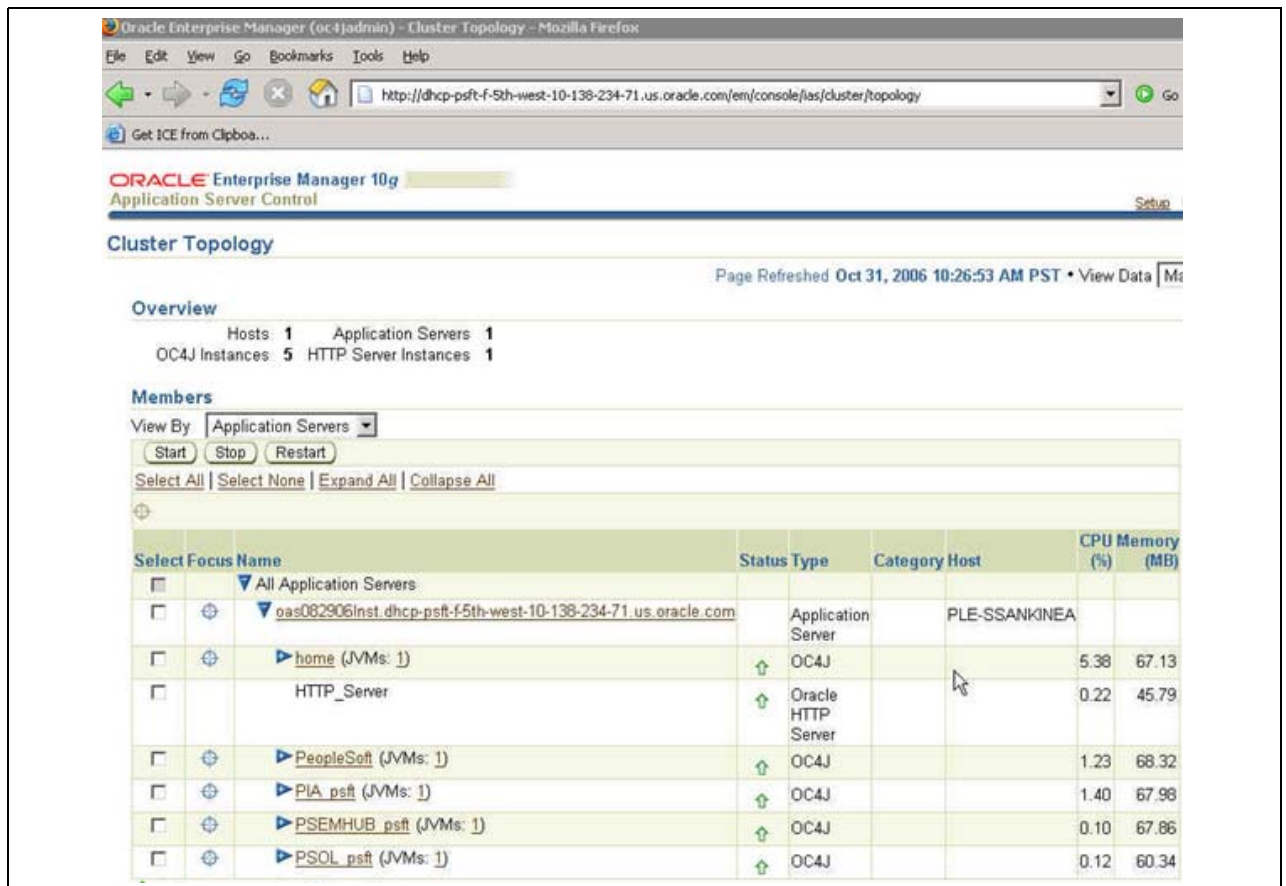
Using Application Server Control

1. Access the Application Server Control console page in a browser by entering the URL
http://<machine-name>:<ohs-port>/em
2. Enter *oc4jadmin* for user name and use the admin password (the password chosen during OAS Install) as the password here.



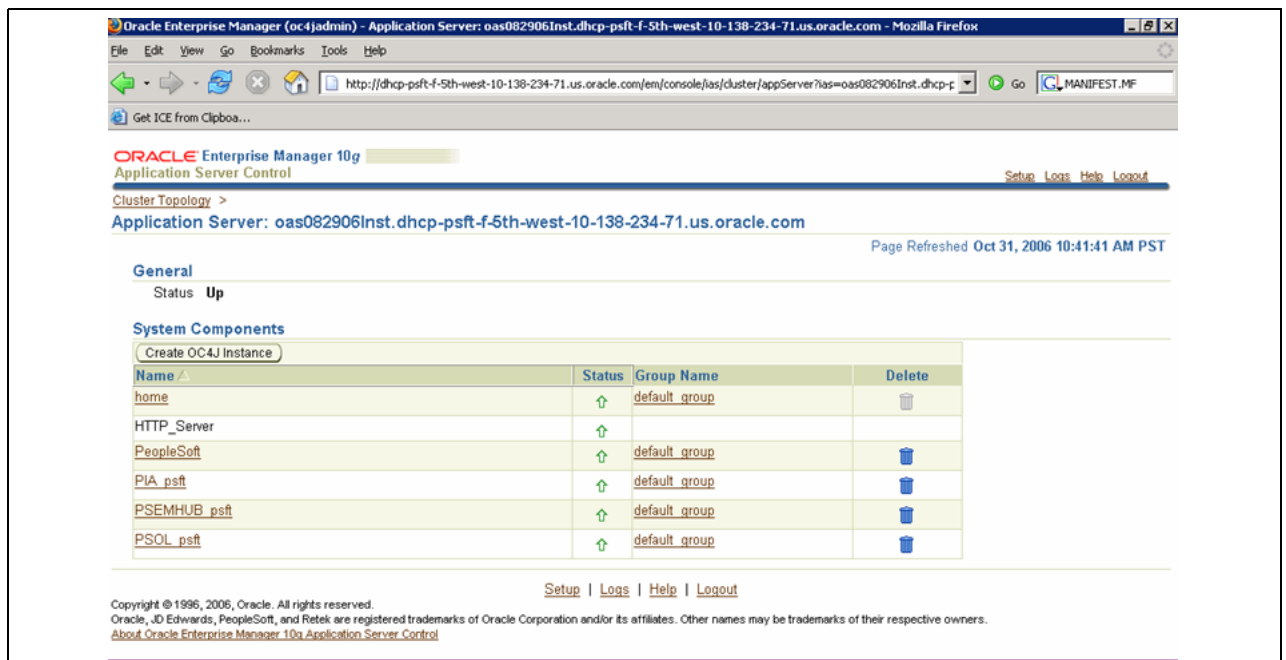
The Application Server Console Page

3. Click on the Application Server instance link.



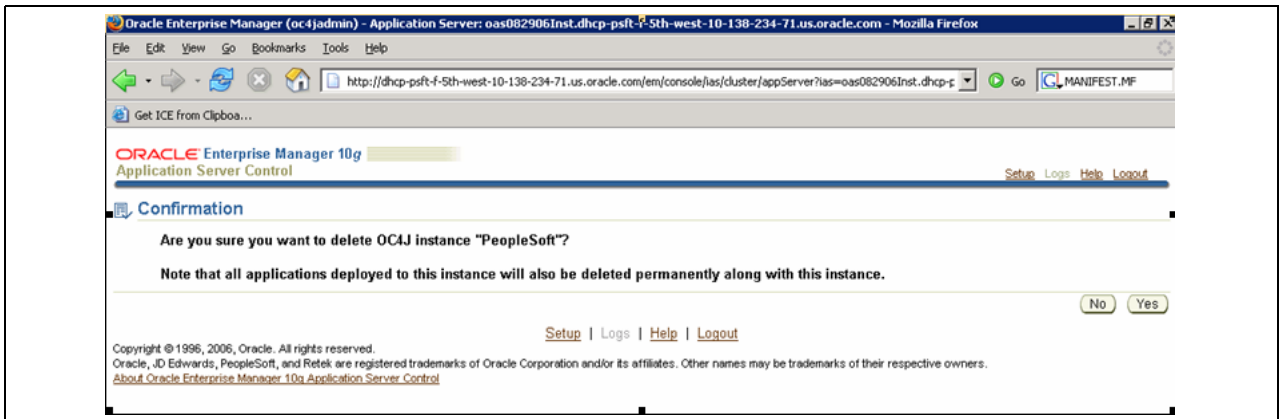
Selecting the Application Server Instance

- Click the Delete icon corresponding to the OC4J component.

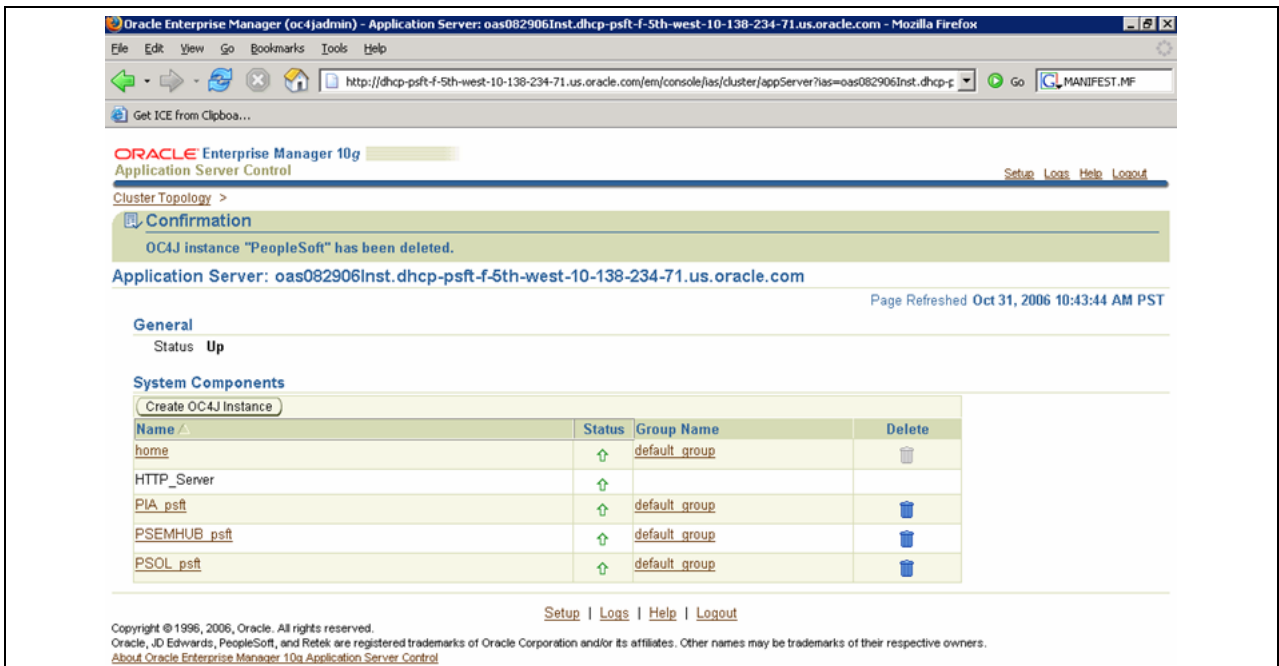


Selecting the Delete Icon for the OC4J component

- Click Yes.



The Delete Confirmation window



Deletion Confirmation window

- In the case of a Multiple Component install, repeat steps 4 and 5 for the other two OC4J components.

Note. VirtualHost entries corresponding to the deleted OC4J Components are not removed from the `<OAS_HOME>\Apache\Apache\conf\mod_oc4j.conf` file. These VirtualHost entries will be stale entries and will be removed in the ensuing PIA install

Using Command Line

Single Component

Stop the OC4J component and remove it. For example:

```
<OAS_HOME>\opmn\bin\opmnctl stopproc process-type=PeopleSoft
<OAS_HOME>\bin\removeinstance -instanceName PeopleSoft
```

Multiple Component

Example:

```

<OAS_HOME>\opmn\bin\opmnctl stopproc process-type=PIA_PeopleSoft
<OAS_HOME>\opmn\bin\opmnctl stopproc process-type=PSOL_PeopleSoft
<OAS_HOME>\opmn\bin\opmnctl stopproc process-type=PSEMHUB_PeopleSoft
<OAS_HOME>\bin\removeinstance -instanceName PIA_PeopleSoft
<OAS_HOME>\bin\removeinstance -instanceName PSOL_PeopleSoft
<OAS_HOME>\bin\removeinstance -instanceName PSEMHUB_PeopleSoft

```

Task 9B-2: Installing the PeopleSoft Pure Internet Architecture on WebLogic in Console Mode

This section describes how to install the PeopleSoft Pure Internet Architecture on WebLogic.

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*, “Working with BEA WebLogic.”

Note. No Service Packs are released yet for WebLogic 9.2. An install of WebLogic 9.2 without any Service Packs works fine with the PIA installation.

To install the PeopleSoft Pure Internet Architecture on WebLogic:

1. Change directory to <PS_HOME>/setup/PsMpPIAInstall and run one of these commands:

```
setup.exe -console
```

or

```
<JAVA_HOME>/bin/java -cp setup.jar run -console
```

where <JAVA_HOME> is the directory where the JRE software is installed. The default is <PS_HOME>/jre.

See “Using the PeopleSoft Installer,” Prerequisites.

A welcome message appears.

Welcome to the InstallShield Wizard for PeopleSoft Internet Architecture.

Using the InstallShield Wizard you will install PeopleSoft Internet⇒

Architecture on your computer.

Version: 8.49

If installing onto a BEA WebLogic Server, make sure to shutdown any running⇒
web servers to avoid web server configuration.

2. Select Enter to continue.
3. Choose the directory where you installed PeopleSoft, or <PS_HOME>.
4. At the prompt

```

[X] 1 - Oracle Application Server
[ ] 2 - BEA WebLogic Server
[ ] 3 - IBM WebSphere Application Server

```

Enter 2 to select the BEA WebLogic Server.

5. At the prompt

Select the web server root directory:

Please specify a directory name or press Enter [c:\Bea] c:\Bea

Enter the top-level directory where WebLogic is installed. Press ENTER to continue.

Note. You will get an error message if you specify a directory that does not contain WebLogic, or that contains an incorrect WebLogic version.

6. Enter the administrator login and password for your WebLogic domain. Press ENTER to continue.

Please enter the administrator login and password for WebLogic domain.

Login ID:

[system]

Password:

[password]

Re-type Password:

[password]

At the next prompt you must choose whether to create a new WebLogic domain or to use an existing domain.

7. If you select Create New WebLogic domain, the installation process automatically generates a valid domain name in the domain name field.

If you attempt to enter an invalid domain name, you see a prompt asking you to enter a new domain name or choose an existing domain.

8. If you select Existing WebLogic Domain, specify the domain name and select one of these options:

Note. You only see the option Existing WebLogic Domain if there is already a domain in <PS_HOME>.

Install additional PeopleSoft site

This option is relevant only to the PeopleSoft PORTAL web application, and does not modify or revert any other configuration settings. Select this option to install only the necessary files for defining an additional PeopleSoft site onto an existing WebLogic configuration. The new site will be accessed using its name in the URL. A site named “CRM” would be accessed using a URL similar to `http://<mywebserver_machine>/CRM`. To reset or re-create an existing PeopleSoft site, simply enter that site's name as the site to create. On your web server, a PeopleSoft site is comprised of the following directories within the PORTAL web application:

<WEBLOGIC_DOMAIN>/applications/peoplesoft/PORTAL/site/*

<WEBLOGIC_DOMAIN>/applications/peoplesoft/PORTAL/WEB-INF/psftdocs/site/*

Redeploy PeopleSoft Internet Architecture

This selection affects all of the PeopleSoft Pure Internet Architecture web applications installed to the local WebLogic domain. Select this

option to redeploy all of the class files and jar files that comprise web components of PeopleSoft Pure Internet Architecture. WebLogic Server configuration files, scripts and any existing PeopleSoft (PORTAL) sites are not overwritten, unless you specify an existing PeopleSoft site during this setup.

Re-create WebLogic domain and redeploy PeopleSoft Internet Architecture

This option affects WebLogic Server configuration and all of the PeopleSoft Pure Internet Architecture web applications installed to the local WebLogic domain. Select this option to completely remove an existing WebLogic domain and create the newly specified PeopleSoft site.

Deploy additional PeopleSoft application extensions

This option is solely for use with PeopleSoft applications. PeopleSoft application extensions are provided with certain PeopleSoft applications, and this option allows you to deploy those extensions. Consult the installation documentation for your PeopleSoft application to see if this option is appropriate. PeopleTools does not use application extensions.

Warning! Re-creating an existing domain will delete everything previously installed into that domain, including PeopleBooks. If you choose to re-create—instead of redeploying—a domain, you may first want to back up your PeopleBooks *docroot* directory (typically, *htmldoc*) below the PSOL directory. You can then restore it after the PeopleSoft Pure Internet Architecture installation.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.

9. Specify the name of the domain.
10. If there are application packages in the archives directory, select whether you want to deploy them. (If you are using an existing domain, you see a prompt for this only if you elected to Deploy Additional PeopleSoft Extensions.)
11. Select the type of domain to create—single server, multi server, or distributed managed server.

Note. You must select "Multi Server Domain" if you plan to host PeopleBooks on the web server on which you are installing the PeopleSoft Pure Internet Architecture.

Please select the configuration to install.

```
[X] 1 - Single Server Domain
[ ] 2 - Multi Server Domain
[ ] 3 - Distributed Managed Server
```

There are three domain configuration options:

- *Single Server Domain:* This domain configuration contains one server, named PeopleSoft Pure Internet Architecture and the entire PeopleSoft enterprise application is deployed to it. This configuration is intended for single user or very small scale, nonproduction environments. This configuration is very similar to the WebLogic domain provided in PeopleTools 8.40 through 8.43.
- *Multi Server Domain:* This domain configuration is contains seven unique server definitions, a WebLogic cluster, and the PeopleSoft Enterprise Application split across multiple servers. This configuration is the intended for a production environment.
- *Distributed Managed Server:* This option is an extension of the *Multi Server Domain* selection and installs the necessary files to boot a managed server. This option requires a Multi Server installation to be performed to some other location, which will contain the configuration for this managed server.

12. Enter a PeopleSoft web site name; the default is ps.

Warning! The site name can include underscores (_), but an underscore cannot be followed by a numeric character or the string “newwin” (for example, my_site_3 or my_newwin_site).

13. Specify your application server name, its JSL (Jolt Station Listener) port number, its HTTP and HTTPS port numbers, the Authentication Token Domain (optional).

Enter port numbers and summaries.

AppServer name:

[APPSRVNAME]

JSL Port:

[9000]

HTTP Port:

[80]

HTTPS Port:

[443]

Authentication Token Domain:(optional)

Note. For the AppServer name setting, enter the name of your application server. For the JSL port setting, enter the JSL port number you specified when setting up your application server. (The default value is 9000.)

See “Configuring the Application Server on Windows.”

Note. The value you enter for the Authentication Token Domain must match the value you specify when configuring your application server, as described earlier in this book. In addition, certain installation configurations require that you specify an authentication domain.

See Using Authentication Domains in the PeopleSoft Pure Internet Architecture Installation.

Note. If you enter a value for the Authentication Token Domain, the URL to invoke PeopleSoft Pure Internet Architecture must include the network domain name in the URL. For example, if you do not enter an authentication domain, the URL to invoke PeopleSoft Pure Internet Architecture is `http://MachineName/ps/signon.html`. If you do enter a value for authentication domain (for example, `.myCompany.com`), the URL to invoke PeopleSoft Pure Internet Architecture is `http://MachineName.myCompany.com/ps/signon.html`. In addition, if the web server for the database is using an http port other than the default port of 80, the URL must include the port number, for example `http://MachineName:8080/ps/signon.html` if there is no authentication domain, or `http://MachineName.myCompany.com:8080/ps/signon.html` if there is an authentication domain. The URL must also comply with the naming rules given earlier in this chapter.

See “Understanding the PeopleSoft Pure Internet Architecture.”

14. Enter the name of the web profile name in the database that will be used to configure this PeopleSoft web site.

This can be the name of either a predelivered one shown on the page, or one you intend to create yourself using PeopleTools, Web Profile Configuration after logging in. Each site is configured according to the profile you specify here when it is first accessed after the web server is booted. The user ID and password will be used by the PIA servlets themselves at runtime to log in to the application server to retrieve the profile. For applications on PeopleTools 8.44 and above, PeopleSoft predelivers the PTWEBSEVER user ID for the purpose of configuring PIA servlets at runtime and running the Performance Monitor Agents. You may have to unlock that user profile in certain application databases. If you have any problems logging in after starting the web server, refer to the application server domain logs.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.

Note. If you are upgrading your application database to PeopleTools 8.44 and above, you must set up the PTWEBSEVER user ID. Go to PeopleTools, Security, User Profiles, User Profiles. Click Add a New Value, enter PTWEBSEVER for User ID, and click Add. Enter and confirm a password, and enter a description. Enter the role *PeopleTools Web Server* and then click Save.

15. Specify the root directory for the Report Repository (c:\psreports by default). You can install to any location.

Note. For the Report Repository directory, specify the same directory that you specify as the Home Directory. Make sure that this directory is shared.

See "Setting Up Process Scheduler," Setting Up the Process Scheduler to Transfer Reports and Logs to Report Repository.

16. Verify all of your selections and press Enter to begin the installation.

You see a progress indicator showing the progress of your installation.

17. When the installation is complete, exit from the console window.

The default installation directory is <PS_HOME>/webserv/<domain>/, where <domain> is the web server domain (peoplesoft by default).

Task 9B-3: Installing the PeopleSoft Pure Internet Architecture on WebSphere in Console Mode

This section discusses:

- Prerequisites
- Installing the PeopleSoft Pure Internet Architecture on WebSphere Application Server ND
- Uninstalling the PeopleSoft Pure Internet Architecture from WebSphere

Prerequisites

The information in this section applies to the installation of PeopleSoft Pure Internet Architecture on a WebSphere Application Server.

Important! For more detailed WebSphere installation topics and Frequently Asked Questions (FAQs) refer to the PeopleSoft Customer Connection link <ftp://ftp.peoplesoft.com/outgoing/PTools/websphere/6103/>

Each WebSphere Application Server runs one PeopleSoft Pure Internet Architecture application. If you need to install more than one PeopleSoft Pure Internet Architecture application on your WebSphere Application Server, you must run PIA install again.

See Also

Installing Web Server Products, Installing WebSphere

Task 9B-3-1: Installing the PeopleSoft Pure Internet Architecture on WebSphere Application Server ND

Before installing the PeopleSoft Pure Internet Architecture (PIA) on WebSphere Application Server(WAS) , you must have installed the WAS software.

See Installing Web Server Products, Installing WebSphere Application Server..

When installing PIA on WAS, you must work with a local copy of the PIA installation software; you cannot install remotely. If you are doing the installation on a machine other than the one on which you installed PeopleTools, copy the <PS_HOME>\setup\PsmPPIAInstall directory to the local machine.

Note. Both WebSphere Application Server Network Deployment and PeopleSoft Internet Application needs to be installed and deployed using the same user id. This restriction has been put forth in order to avoid any security and manage profile creation issues.

To install the PeopleSoft Pure Internet Architecture on WebSphere:

1. Change directory to <PS_HOME>/setup/PsmPPIAInstall and run one of these commands:

```
setup.<OS> -console
```

or

```
<JAVA_HOME>/bin/java -cp setup.jar run -console
```

where <JAVA_HOME> is the directory where the JRE software is installed. The default is <PS_HOME>/jre.

See Using the PeopleSoft Installer, Prerequisites

A welcome message appears

2. Select Enter to continue.
3. Choose the directory where you installed PeopleSoft, or <PS_HOME>.
4. At the prompt

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

Enter 3, to select the IBM WebSphere Application Server.

5. At the following prompt

Select the WebSphere Application Server home:

Directory Name:

[/opt/IBM/WebSphere/AppServer]

Enter the directory where you installed WAS, or press ENTER to accept the default.

6. Enter an application name for this web server.
7. Select the type of server you want to install, and press ENTER to continue.

Select the server install type:

[X] 1 - Single Server Installation

[] 2 - Multi Server Installation

The Single Server Installation option creates one WebSphere Application Server profile to hold all the PeopleSoft web applications. The installer uses the Application Name you enter for the new profile's name.

The Multi Server Installation option splits the PeopleSoft web application into three WebSphere Application Server Profiles —PIA_<application_name>, PSOL_<application_name> (for the PeopleSoft Online Library) and PSEMHUB_<application_name> (for the PeopleSoft Environment Management Framework). Each profile has its own JVM, so the multiserver option will be better suited for installations needing higher performance or reliability. If you are not sure which to pick, choose Single.

See *PeopleTools 8.49 PeopleBook: System and Server Administration*, "Working with IBM WebSphere"

8. If you enter a new name, for example, peoplesoft, press ENTER, skip the next two steps, and continue with step 11.
9. If the name you enter belongs to an WAS web application that already exists, for example, jwong_single, select one of the options below and press ENTER to continue.

The PeopleSoft application "jwong_single" already exists.

Select from the following:

[X] 1 - Install additional PeopleSoft site

[] 2 - Redeploy PeopleSoft Internet Architecture

[] 3 - Deploy additional PeopleSoft application extensions

Note. Make sure the server is up and running before choosing any of the above options.

Install additional PeopleSoft site: Select this option to install only the necessary files for defining an additional PeopleSoft site onto the existing WAS web server configuration.

Redeploy PeopleSoft Internet Architecture: This selection affects all of the PeopleSoft Pure Internet Architecture web applications installed to the local WebSphere Application Server profile. Select this option to redeploy PeopleSoft Enterprise Application that comprise web components of PeopleSoft Pure Internet Architecture.

Deploy additional PeopleSoft application extensions: This option is solely for use with PeopleSoft product applications. PeopleSoft application extensions are provided with certain PeopleSoft applications, and this option allows you to deploy those extensions. Consult the installation documentation for your PeopleSoft application to see whether this option is appropriate. PeopleTools does not use application extensions.

10. If you select the option Deploy additional PeopleSoft application extension, select the application packages you want to deploy:

[X] 1 -EMP PeopleSoft Activity Based Mgmt

11. Enter a web site name; the default is ps.

Warning! The site name can include underscores (_), but an underscore cannot be followed by a numeric character or the string “newwin” (for example, my_site_3 or my_newwin_site).

12. Specify your application server name, its JSL (Jolt Station Listener) port number, its HTTP and HTTPS port numbers, the authentication token domain (optional).

Enter port numbers and summaries.

AppServer name:

[<App Server Machine Name>]

JSL Port:

[9000]

HTTP Port:

[8000]

HTTPS Port:

[4430]

Authentication Token Domain:(optional) []

Note. For the AppServer name setting, enter the name of your application server. For the JSL port setting, enter the JSL port number you specified when setting up your application server. (The default value is 9000.)

See “Configuring the Application Server on UNIX.”

Note. The HTTP/HTTPS port numbers are reset to those that you just specified when you restart your WebSphere server.

In the case of Multi Server Installation type, http port and https ports can not be consequent numbers. The range for port number will be <Port#>-<Port#>+2 for all the three application server profiles that the install creates. For example, if you select HTTP Port as 5555 and HTTPS port as 5560 then the ports are assigned as given below.

ProfileName	HTTP port Number	HTTPS port Number
PIA_<application_name>	5555	5560
PSEMHUB_<application_name>	5556	5561
PSOL_<application_name>	5557	5562

Note. The value you enter for the Authentication Token Domain must match the value you specify when configuring your application server, as described earlier in this book. In addition, certain installation configurations require that you specify an authentication domain. See *Using Authentication Domains in the PeopleSoft Pure Internet Architecture Installation*.

Note. If you enter a value for the Authentication Token Domain, the URL to invoke PeopleSoft Pure Internet Architecture must include the network domain name in the URL. For example, if you do not enter an authentication domain, the URL to invoke PeopleSoft Pure Internet Architecture is `http://MachineName/ps/signon.html`. If you do enter a value for the authentication domain (for example, `.myCompany.com`), the URL to invoke PeopleSoft Pure Internet Architecture is `http://MachineName.myCompany.com/ps/signon.html`. In addition, if the web server for the database is using an HTTP port other than the default port of 9080, the URL must include the port number, for example `http://MachineName:8080/ps/signon.html` if there is no authentication domain, or `http://MachineName.myCompany.com:8080/ps/signon.html` if there is an authentication domain. The URL must also comply with the naming rules given earlier in this chapter.

See "Understanding the PeopleSoft Pure Internet Architecture."

13. Enter the name of the web profile in the database that will be used to configure this PeopleSoft web site.

This can either be the predelivered name as shown on the page, or one that you intend to create yourself using PeopleTools, Web Profile Configuration after logging in. Each site is configured according to the profile you specify here when it is first accessed after the web server is booted. The user ID and password will be used by the PIA servlets themselves at runtime to log in to the application server to retrieve the profile. For applications on PeopleTools 8.44 and above, PeopleSoft predelivers the PTWEBSEVER user ID for the purpose of configuring PIA servlets at runtime and running the Performance Monitor Agents. You may have to unlock that user profile in certain application databases. If you have any problems logging in after starting the web server, refer to the application server domain logs.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.

Note. If you are upgrading your application database to PeopleTools 8.44 and above, you must set up the PTWEBSEVER user ID. Go to PeopleTools, Security, User Profiles, User Profiles. Click Add a New Value, enter PTWEBSEVER for User ID, and click Add. Enter and confirm a password, and enter a description. Enter the role PeopleTools Web Server and then click Save.

14. Specify the root directory for the Report Repository (`c:\psreports` by default). You can install to any location.

Note. For the Report Repository directory, specify the same directory that you specify as the Home Directory. Make sure that this directory is shared.

See "Setting Up Process Scheduler," Setting Up the Process Scheduler to Transfer Reports and Logs to Report Repository.

15. Verify your selections and press Enter to start the installation. You see an indicator showing the progress of your installation.
16. When the installation is complete, exit from the console window.

The default installation directory is `<PS_HOME>\webserv\<profilename>`.

Task 9B-3-2: Uninstalling the PeopleSoft Pure Internet Architecture from WebSphere

You cannot uninstall PeopleSoft Pure Internet Architecture simply by deleting <PS_HOME>\webserv\<profilename>, without uninstalling it from WebSphere Administration Console. If you do so, the WebSphere registry becomes corrupt, and subsequent attempts to install PeopleSoft Pure Internet Architecture will fail. Instead, if necessary, you must uninstall PeopleSoft Pure Internet Architecture on WebSphere as described here:

To uninstall PeopleSoft Pure Internet Architecture on WebSphere:

1. Open WebSphere Administration Console at <http://<machine-name>:9060/ibm/console>
2. Log in as any user.
3. Choose Applications, Enterprise Applications.
4. Select the check boxes for the PeopleSoft Pure Internet Architecture applications you want to uninstall, and click Stop.
5. Select the check boxes for the PeopleSoft Pure Internet Architecture applications you want to uninstall, and click Uninstall.
6. Save your configuration.
7. Stop WebSphere server using the following commands:

On Windows:

```
<PS_HOME>\webserv\<profilename>\bin\stopServer.bat server1
```

On UNIX

```
<PS_HOME>\webserv\<profilename>\bin\stopServer.sh server1
```

8. In addition to uninstalling the application, you need to remove the WebSphere Application Server profile (that got created during PIA install) to complete the PIA uninstallation.

To uninstall profile run the following steps:

- a. Go to <PS_HOME>\webserv\<profilename>\bin
- b. Run the following command

On Windows:

```
manageprofiles.sh -delete -profileName <profilename>
```

On UNIX

```
manageprofiles.bat -delete -profileName <profilename>
```

where <profilename> indicates the application name that you have selected during the PIA install.

- c. Delete the directory <PS_HOME>\WebServ\<profile_name>

Task 9B-4: Testing the PeopleSoft Pure Internet Architecture Installation

This section discusses:

- Starting and Stopping Oracle Application Server

- Starting and Stopping WebLogic
- Starting and Stopping WebSphere Application Servers
- Accessing the PeopleSoft Signon
- Updating Database Information
- Updating PeopleTools Options

Note. After installing the PeopleSoft Pure Internet Architecture, you should make sure that your configuration is functional. You can test this by signing on to PeopleSoft, navigating within the menu structure, and accessing pages. (Make sure the application server is configured and booted.)

Task 9B-4-1: Starting and Stopping Oracle Application Server

There are several commands you can use to start and stop OAS and PIA, either separately or together.

Action	Command (full path)
Start PIA and other related processes	<OAS_HOME>/opmn/bin/opmnctl startall
Stop PIA and other related processes	<OAS_HOME>/opmn/bin/opmnctl stopall
View the status of the PIA installation on OAS	<OAS_HOME>/opmn/bin/opmnctl status
Start only PIA. In a single-component installation, <i>PIA_component</i> is the same as the application name entered during the installation of PIA on OAS. In a multi-component installation, <i>PIA_component</i> is a combination of the application name entered during the installation and the specific OC4J component type. The default name for the PIA component in a multi-component installation is <i>PIA_PeopleSoft</i> .	<OAS_HOME>/opmn/bin/opmnctl.exe⇒ startproc ias-component=OC4J process⇒ type=PIA_component
Stop only PIA.	<OAS_HOME>/opmn/bin/opmnctl.exe⇒ stopproc ias-component=OC4J process⇒ type=PIA_component

Task 9B-4-2: Starting and Stopping WebLogic

If you are using the WebLogic web server, you need to sign on to WebLogic. If you are using WebSphere instead, go on to the next procedure.

Note. Starting from WebLogic 9.2, all the Life cycle management scripts of server PIA and other batch scripts are located in <PS_HOME>\webserv\<domain_name>\bin folder.

To start WebLogic:

1. To start BEA WebLogic Server as a foreground process, execute the following command in your WebLogic domain directory (the default directory is <PS_HOME>\webserv\<domain_name>\bin):

Single Server:

startPIA.cmd (on Windows)
startPIA.sh (on UNIX)

Multi Server or Distributed Server:

startWebLogicAdmin.cmd (on Windows)
startWebLogicAdmin.sh (on UNIX)

and then

startManagedWebLogic.cmd <ManagedServerName> (on Windows)
startManagedWebLogic.sh <ManagedServerName> (on UNIX)

2. To stop the server, execute the following command in your WebLogic domain directory:

Single Server:

stopPIA.cmd (on Windows)
stopPIA.sh (on UNIX)

Multi Server or Distributed Server:

stopWebLogic.cmd [-url t3://ServerHostName:port | <ManagedServerName>] (on Windows)
stopWebLogic.sh [-url t3://ServerHostName:port | <ManagedServerName>] (on UNIX)

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.

Task 9B-4-3: Starting and Stopping WebSphere Application Servers

By default, all of the servers of WAS instance are stopped when you install PIA. You need to start the server in order to access the PeopleSoft Enterprise Application.

To start WebSphere Application Server:

1. Change directories to the folder in which WebSphere Application Server profile is installed, which is the bin directory under the WebSphere home directory

<ps_home>\webserv\<profilename>\bin.

2. Enter the command

On UNIX:

startServer.sh <server_name> -profileName <profilename>

where <profilename> indicates the application name that you have selected during the PIA install and <server_name> will be the server that gets created when the application server profile is created.

3. To stop the server, enter the command:

On UNIX:

stopServer.sh <server_name> -profileName <profilename>

Task 9B-4-4: Accessing the PeopleSoft Signon

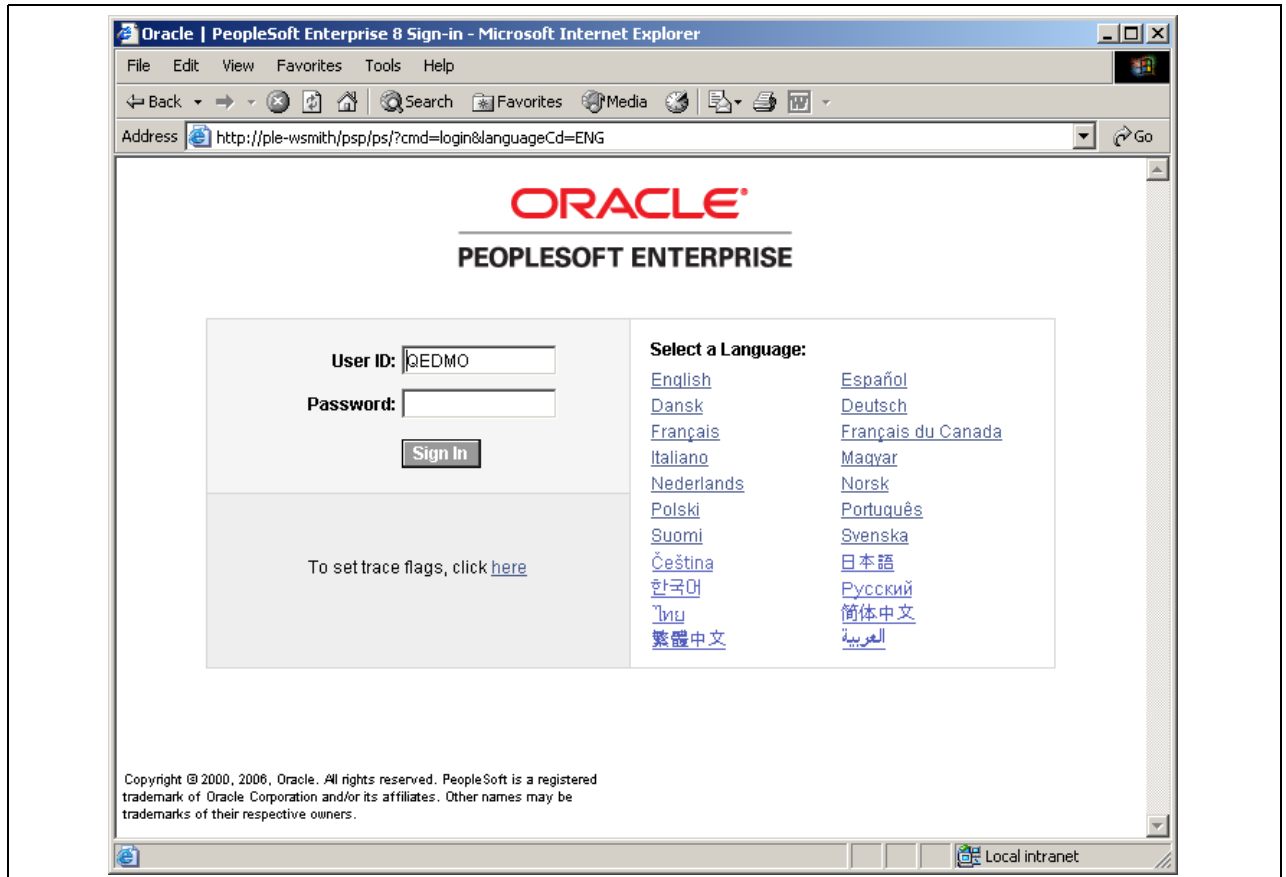
To access the PeopleSoft signon:

1. Open your web browser.
2. Enter the name of the site you want to access—for example (the default value for <site_name> is ps):

`http://<machine_name>:<http_port>/<site_name>/signon.html`

Note. PeopleSoft Pure Internet Architecture installed on WebSphere server listens at the HTTP/HTTPS ports specified during the PeopleSoft Pure Internet Architecture install. Invoke PeopleSoft Pure Internet Architecture through a browser by using the specified HTTP or HTTPS ports—that is, `http://<WebSphere_machine_name>:<server_port>/<site_name>/signon.html` (if AuthTokenDomain is not specified) or `http://<WebSphere_machine_name.mycompany.com>:<server_port>/<site_name>/signon.html` (if you specified .mycompany.com as the AuthTokenDomain).

This will take you to the signon screen corresponding to your browser's language preference.



Oracle PeopleSoft Enterprise Sign in window

Note. If you do not see the signon screen, check that you supplied all the correct variables and that your application server and the database server are running.

3. Sign in to the PeopleSoft system by entering a valid user ID and password.

Different applications use different default user IDs and passwords. For instance, for HRMS applications you enter PS for the user ID and the password. For Financials applications, you enter VP1 for the user ID and the password. Your application-specific install instructions contain any custom/delivered user IDs that you should use for the demonstration environment.

Note. The user ID and password are case sensitive. You need to enter the user ID and password using UPPERCASE.

Task 9B-4-5: Updating Database Information

The database information updated in this procedure is used by the PeopleSoft software update tools to identify your PeopleSoft database when searching for updates. These steps should be followed for all additional databases that you create to enable the accurate identification of your databases.

1. Sign on to your PeopleSoft database.
2. Navigate to PeopleTools, Utilities, Administration, PeopleTools Options.
3. Specify long and short names for your environment. For example:
 - Environment Long Name — Customer HR Demo Database
 - Environment Short Name — HR Demo DB
4. Select a system type from the drop-down list. For example, Demo Database.
5. Save your changes.

Task 9B-4-6: Updating PeopleTools Options

You can set the following options on the PeopleTools Options page:

- Multi-Currency — Check this box if you plan to use currency conversion.
See Enterprise PeopleTools 8.49 PeopleBook: Global Technology, “Controlling Currency Display Format.”
- Base Time Zone — Check this box to set the base time zone for your PeopleTools database.
See Enterprise PeopleTools 8.49 PeopleBook: Global Technology “Setting and Maintaining Time Zones.”
- Data Field Length Checking Flag — Check this box if you are using a Japanese EBCDIC (DB2 MBCS) or Japanese Shift-JIS (MBCS) database.
See Enterprise PeopleTools 8.49 PeopleBook: Global Technology, “Selecting and Configuring Character Sets and Language Input and Output.”
- Sort Order Option — If you specified a non-binary sort order for your database, choose the Sort Order Option that most closely approximates your database sort order.
See Enterprise PeopleTools 8.49 PeopleBook: Global Technology, “Sorting in PeopleTools.”

CHAPTER 10

Setting Up Process Scheduler on Windows

This chapter discusses:

- Prerequisites
- Setting Up Process Scheduler Security
- Setting Up Process Scheduler to Transfer Reports and Logs to the Report Repository
- Setting Environment Variables
- Setting Up Process Scheduler Server Agent
- Starting Process Scheduler as a Windows Service (Optional)
- Configuring the Process Scheduler for Word for Windows (Optional)
- Configuring Setup Manager

See Also

Enterprise PeopleTools 8.49 Hardware and Software Requirements

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler

PeopleSoft Customer Connection, Supported Platforms (Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms, PeopleSoft Enterprise)

Prerequisites

Before setting up your Process Scheduler, you must:

- Install Tuxedo (except for z/Linux).
See “Installing Additional Components.”
- Install database connectivity to be able to communicate with your database server (Process Scheduler requires a direct connection to the database).
See “Preparing for Installation.”
- Set up the web server with the PeopleSoft Pure Internet Architecture, as described in the previous chapter. This is required to set up the Process Scheduler to transfer reports or log files to the Report Repository.
- Set up your COBOL batch environment if you need to run COBOL processes through Process Scheduler. COBOL is no longer required to start a Process Scheduler Server Agent because the program for Process Scheduler has been rewritten in C++. If the PeopleSoft modules purchased do not contain any COBOL modules, the COBOL run time libraries are not required. Also, COBOL is not required for applications

that contain no COBOL programs. Consult Customer Connection for the details on whether your application requires COBOL.

See “Chapter “Preparing for Installation” section “Planning Your Initial Configuration” for information on how to access the COBOL Requirements page.”

- Install the Microsoft Office products Microsoft Word and Microsoft Excel.
- Have both your application server and the PeopleSoft Pure Internet Architecture started. In this chapter, you must modify security options of the designated PeopleSoft user ID that will be used to boot up Process Scheduler. This requires that the user ID's profile be modified through the User Security component. Please refer to earlier chapters for the details on starting the application server and the PeopleSoft Pure Internet Architecture.

Task 10-1: Setting Up Process Scheduler Security

This section discusses:

- Understanding Process Scheduler Security
- Changing User Account to Start BEA ProcMGR V9.1
- Granting Process Scheduler Administrative Rights

Understanding Process Scheduler Security

This task—in which you set up the PeopleSoft User ID that will be used to boot Process Scheduler server so it has administrative rights to both Process Scheduler and Report Manager—guarantees that security is set up properly both in Windows and within your PeopleSoft database.

You must carry out this task to start Process Scheduler successfully.

Set up BEA ProcMGR V9.1 with a network user ID.

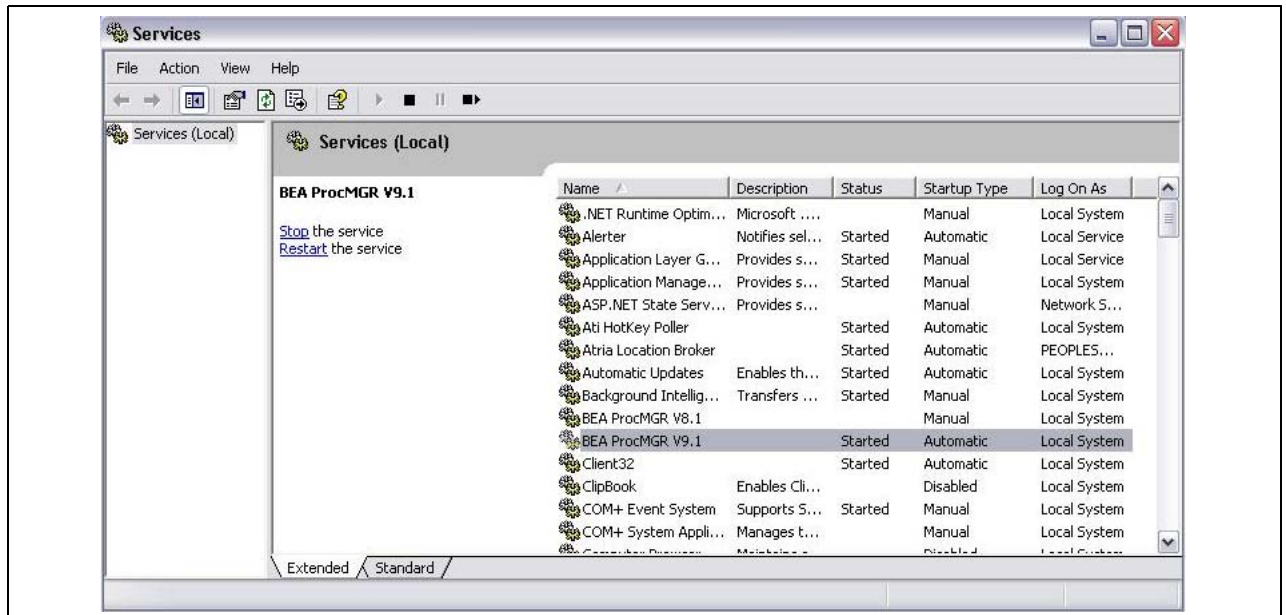
When you install BEA Tuxedo, the BEA ProcMGR V9.1 service is set up by default to be started by local system account—a user account that does not have access to the Windows network. If the Process Scheduler server or processes initiated through Process Scheduler will be using a network printer, accessing files from a network drive, or using Windows utilities such as XCOPY that may access UNC paths, you need to change the user account used to start BEA ProcMGR with a network user account.

Task 10-1-1: Changing User Account to Start BEA ProcMGR V9.1

To change User Account to start BEA ProcMGR V9.1:

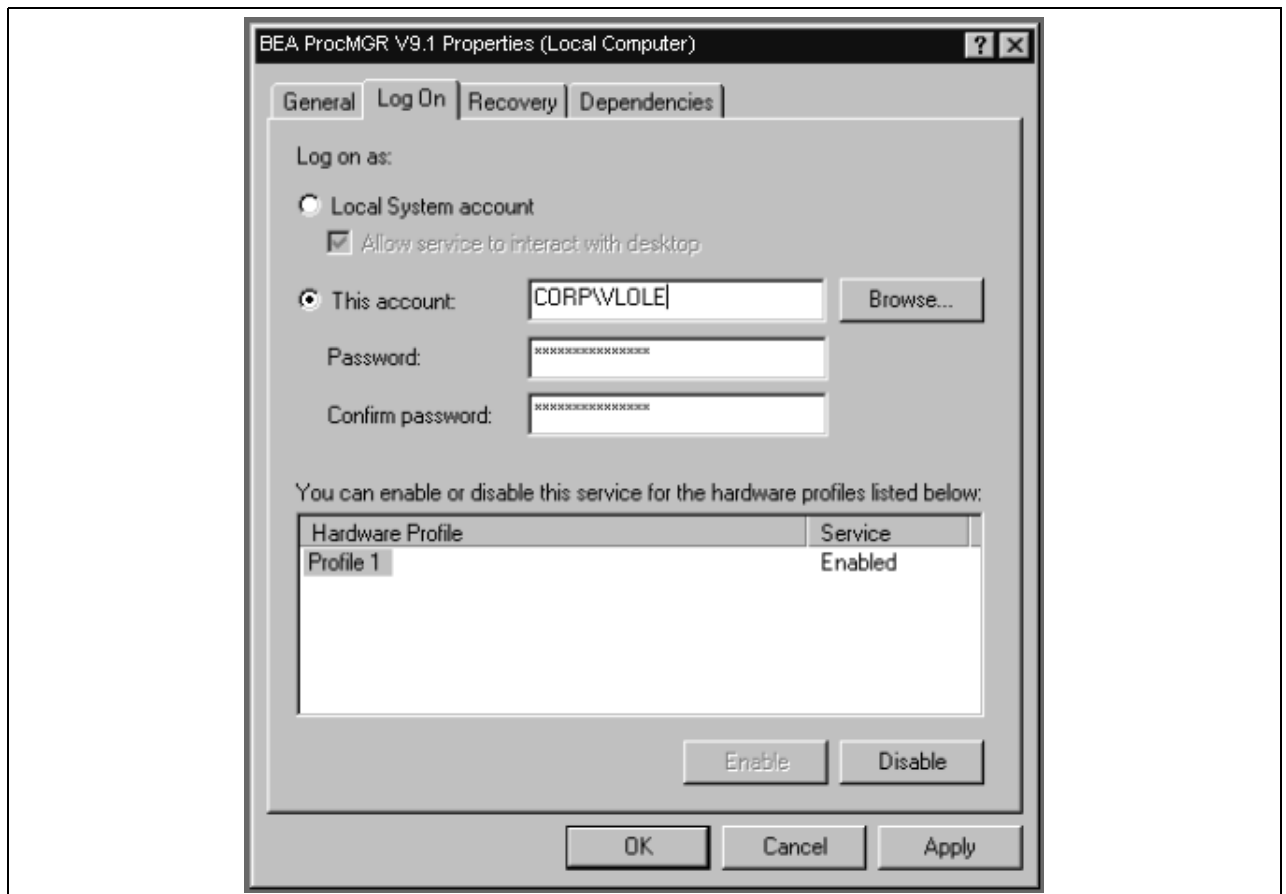
1. Select Start, Settings, Control Panel. Double-click Administrative Tools, and double-click the Services icon.

In the Services dialog box, find the service labeled *BEA ProcMGR V9.1*. This service is installed automatically when you install Tuxedo.



Services Dialog Box

2. If the Stop button is enabled, click on it to stop the current BEA ProcMGR V9.1 process. Click Yes when a message informs you of the status change. Then, click BEA ProcMGR V9.1 and click Startup to modify its settings. You see this Service dialog box.



BEA ProcMGR V9.1 Properties Dialog

3. Choose This Account.

Note. When you configure your Tuxedo server as outlined in the chapter, "Configuring the Application Server," the user ID designated to be the Application Server Administrator must have read/write permissions to the PeopleSoft file directory and read permission to the %TUXDIR% directory, such as c:\tuxedo.

4. Make sure that Startup Type is set to Automatic, and click OK.
5. Click Start. A message in the Services dialog box will indicate the "Started" status. Click Close to return to Control Panel.

Task 10-1-2: Granting Process Scheduler Administrative Rights

To grant Process Scheduler administrative rights:

1. Log onto your PeopleSoft database through the PeopleSoft Pure Internet Architecture.
2. Select PeopleTools, Security, User Profiles.
3. Select the User Profiles component. Use the Search dialog to select the PeopleSoft User ID you plan to use to boot the Process Scheduler server.
4. Click the Roles tab, click the plus icon to insert a new row, and there enter the *ProcessSchedulerAdmin* role to grant the user ID with administrative rights in the Process Scheduler components.

The screenshot shows the 'Roles' tab in the PeopleSoft User Profiles component. The 'User ID' is 'VP1' and the 'Description' is 'VP of Corporate Planning'. Below this is a table of roles with columns for Role Name, Description, Dynamic, and View Definition. The roles listed are Coordinator, PAPP_USER, Packaging, PeopleSoft Administrator, PeopleSoft User, PeopleTools, ProcessSchedulerAdmin, ReportDistAdmin, UPG_ALLPANLS, and UPG_APPSRVR. Each role has a 'Route Control' and 'View Definition' link, and a '+' and '-' icon in the final column.

Role Name	Description	Dynamic	View Definition		
Coordinator	Coordinator	☐	Route Control View Definition	+	-
PAPP_USER	Enterprise Portal User	☐	Route Control View Definition	+	-
Packaging	Env. Mgmt. Packaging	☐	Route Control View Definition	+	-
PeopleSoft Administrator	PeopleSoft Admin Privileges	☐	Route Control View Definition	+	-
PeopleSoft User	PeopleSoft User	☐	Route Control View Definition	+	-
PeopleTools	PeopleTools	☐	Route Control View Definition	+	-
ProcessSchedulerAdmin	Process Scheduler Admin	☐	Route Control View Definition	+	-
ReportDistAdmin	Report Distribution Admin	☐	Route Control View Definition	+	-
UPG_ALLPANLS	ALLPANLS	☐	Route Control View Definition	+	-
UPG_APPSRVR	Can start application server	☐	Route Control View Definition	+	-

Process Scheduler window: Roles tab

5. Repeat the instructions in step 4 to add the role *ReportDistAdmin*. This will grant the user ID administrative rights to the Report Manager component.
6. Click Save to save your changes.
7. Select the General tab and jot down the Permission List name assigned to the Process Profile field.

8. From the Portal menu, choose PeopleTools, Security, Permissions & Roles, Permission Lists.
9. In the Search dialog, enter the Permission List you noted in step 7.
10. Select the Can Start Application Server check box.
11. Click Save to save your changes.

Task 10-2: Setting Up Process Scheduler to Transfer Reports and Logs to the Report Repository

This section discusses:

- Understanding Report Distribution
- Setting Up Single Signon to Navigate from PIA to Report Repository
- Determining the Transfer Protocol
- Starting the Distribution Agent
- Setting Up the Report Repository
- Setting Up the Distribution for Your Process Scheduler Server
- Setting Up Sending and Receiving of Report Folders in the Report Manager

Understanding Report Distribution

The PeopleTools Report Distribution lets you access reports and log files generated from process requests run by a Process Scheduler Server Agent. Using the PeopleSoft Pure Internet Architecture, you can view reports and log files from the web browser through the Report Manager or Process Monitor Detail page. Report Distribution enables you to restrict access to these reports to authorized users based either on user ID or role ID.

This product also includes the Distribution Agent component, which runs on the same server as the Process Scheduler Server Agent. The Distribution Agent, a process that runs concurrently with the Process Scheduler Server Agent, transfers to the Report Repository files generated by process requests initiated by the Process Scheduler Server Agent.

The Distribution Agent transfers files to the Report Repository when one of these criteria is true:

- The Process Scheduler Server Agent is set up in the *Server Definition* to transfer all log files to the Report Repository.
- The process request output destination type is *Web/Window*.

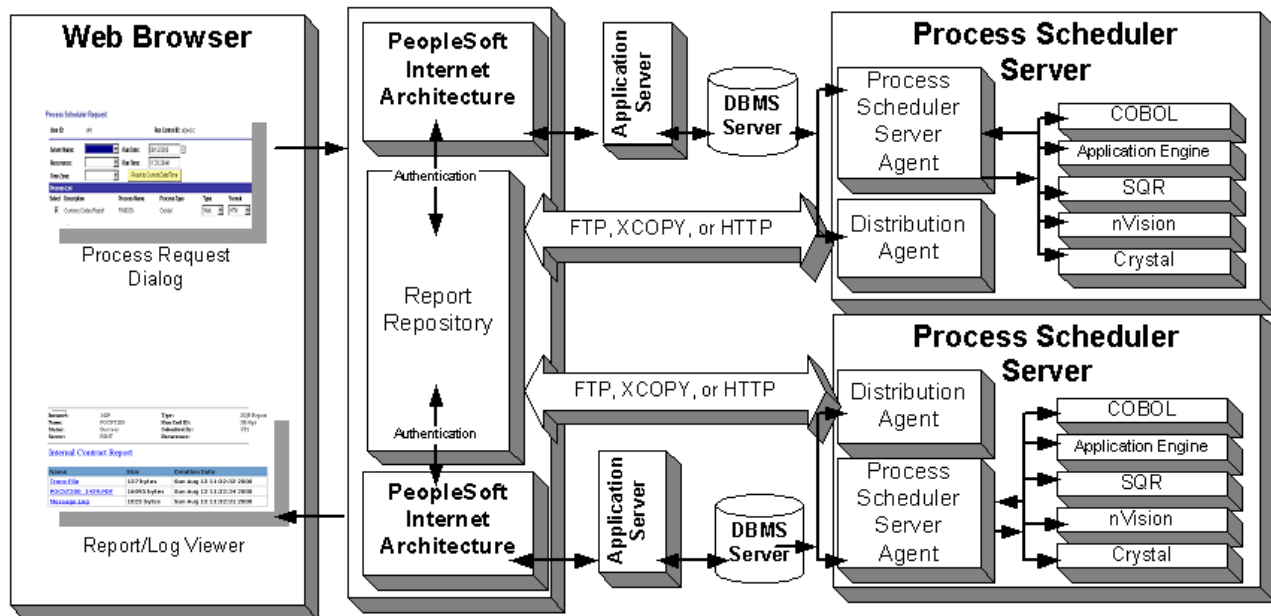
In either case, the Process Scheduler Server Agent inserts a row in the Report List table (PS_CDM_LIST). The server agent then updates the distribution status for a process request to *Posting* upon completion of the program associated with the process request. The distribution status of Posting signals the Distribution Status that the files for the process request are ready for transfer to the Report Repository. The Distribution Agent is notified by Process Scheduler for any process requests that are ready for transferring. As part of the process to transfer files to the Report Repository, the Distribution Agent performs the following steps:

- *Transfer files to the Report Repository.* All the report and log files are transferred to the Report Repository. For each process request transferred, a directory is created in the Report Repository using the following

format: \<database name>\<date yyyyymmdd>\<report id>. All the files for a process request are stored in this directory.

- *Delete the directory from the Process Scheduler Agent's Log/Output directory.* When the output destination type specified for a process request is Web/Window, all the files and directory associated with the process request are deleted from the Process Scheduler Log/Output directory after the files are transferred to the Report Repository.

The following diagram illustrates the Process Scheduler and Report Repository architecture.



Process Scheduler and Report Repository Architecture

Note. The PeopleSoft Pure Internet Architecture must be installed for Process Scheduler to be able to transfer reports to the Repository.

Note. Before users can view a report, they are authenticated against the PeopleSoft database.

Note. You should set up single signon if you do not want users to have to log on an additional time to view reports in the Report Repository. For the details on setting up single signon, consult the security PeopleBook.

See *Enterprise PeopleTools 8.49 PeopleBook: Security Administration*.

Task 10-2-1: Setting Up Single Signon to Navigate from PIA to Report Repository

To view reports (log files or system files) from Report Repository, you need to pass the authentication. Report Repository should be treated as a separate PeopleSoft application. To navigate from PeopleSoft Pure Internet Architecture (PIA) to Report Repository, you need to set up single signon to avoid getting a prompt for a second signon. Here are some considerations for setting up single signon to navigate from PIA to Report Repository:

If Report Repository resides on the same web server as the PeopleSoft Pure Internet Architecture, make sure your Local Message Node is set up to be a "trusted" node for single signon for your system.

If Report Repository resides on a different web server than PeopleSoft Pure Internet Architecture, do the following:

- Make sure your Local Message Node is set up to be a "trusted" node for single signon for your system.
- Use a fully qualified domain name when addressing the web server for both PIA and Report Repository. For example, enter `http://<machineName>.peoplesoft.com/<site_name>/signon.html` instead of `http://<machineName>/<site_name>/signon.html`.
- Specify the Authentication Domain for your application during installation. If you have multiple applications, and you want them to employ single signon, it is important to specify the same Authentication Domain for all applications.

See *Enterprise PeopleTools 8.49 PeopleBook: Security Administration*, "Implementing Single Signon."

- Set up single signon with a password, like this:
 - Choose PeopleTools, Integration Broker, Integration Setup, Nodes.
 - Click Search and then select the node marked as Default Local Node.
 - Select *Password* for the Authentication Option.
 - Enter a password of your choice.
 - Enter the password again in the Confirm Password field.
 - Enter the user ID for which you are setting up single signon in the Default User ID field.
 - Save the Node Definition.
 - Sign off of PIA.
 - Reboot your application server.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Security Administration

Task 10-2-2: Determining the Transfer Protocol

We recommend using HTTP as your transfer protocol.

Before transferring the files to the Report Repository, you need to determine which transfer protocol to use. You can use either an XCOPY, FTP, or HTTP/HTTPS. (If FTP information is not specified, Process Scheduler will perform an XCOPY.)

Note. If you are using FTP, the FTP service must be set up in your web server.

Note. JRE is installed automatically on your Process Scheduler server.

Task 10-2-3: Starting the Distribution Agent

The Distribution Agent is automatically started as another Tuxedo server when a Process Scheduler Server is booted. If a Process Scheduler Server was set up without specifying a Distribution Node in the *Server Definition* page, the Process Scheduler server will have a status in Process Monitor of "Running with No Report Node." Once a node is defined for the Process Scheduler server and in the next cycle the Process Scheduler server checks the state of the system, the Distribution Agent dynamically sets up its environment.

Task 10-2-4: Setting Up the Report Repository

This section discusses:

- Defining ReportRepositoryPath
- Defining the Report Node to Use HTTP/HTTPS
- Defining the Report Node to Use XCOPY
- Defining the Report Node to Use FTP

Defining ReportRepositoryPath

The ReportRepositoryPath specifies the location of a directory for the Report Repository. You can specify the location for the Report Repository Path on the General page of the Web Profile during installation. If you do not set the location in the Web Profile, the location given by ReportRepositoryPath in the configuration.properties file is used for the default location. Note that the value entered for Report Repository Path in the Web Profile overrides any entry in the configuration.properties file.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*, “Configuring the Portal Environment.”

Use the following formats to enter the name for the directory that you want to use for the ReportRepositoryPath. The examples below give the default values. Note that you must use a forward slash (/) in both cases:

- *Windows*: ReportRepositoryPath=c:/psreports
- *UNIX*: ReportRepositoryPath=/opt/psreports

Defining the Report Node to Use HTTP/HTTPS

To define the report node to use HTTP/HTTPS:

1. Select PeopleTools, Process Scheduler, Report Nodes.
2. Select the Add a New Value link and enter the Report node name.

The Report Node Definition page appears. You are on the Http Distribution Node page.

3. Verify that the Http Information option is selected.

Report Node Definition page for HTTP

4. Enter the *URL* of the web server using the following format:

`http://<machine name>:<port number>/psreports/<site name>`

Replace <machine name> with the name of your machine. Use the fully qualified host name for your web server. If you are using an http port other than 80, you need to specify the port number.

Note. If you specify the Authentication Token Domain name during the PeopleSoft Pure Internet Architecture installation, you must include a fully qualified domain name for the URL instead of the IP address.

- *Description:* Enter a description of the server (optional).
 - *Operating System:* Select the web server operating system.
5. Enter the following Connection Information:
 - *http/https:* Select the http option if you are *not* using SSL (default). Select the https option if you are using SSL. Note that if you are using SSL you need to have Client Certificates installed on your web server.
 - *URI Host:* Enter the machine name for the report repository.

Note. In a basic setup, the machine name for the report repository will match the machine name of the web server URL. However, under certain circumstances—for example, if you are using a reverse proxy server—the URL and URI Host may have different machine names.

- *URI Port:* Enter the port number, which must match the port number of your web server (defaults are http = 80, https = 443). If you change a port number you will lose the default values for both protocols.

- *URI Resource:* Enter SchedulerTransfer/<site name>.

Note. The setup of basic authentication is optional, but is recommended for security of the Report Repository when using the HTTP to transfer files. For detailed instructions on setting up basic authentication on the web server where the Report Repository resides, refer to the appendix “Securing the Report Repository for HTTP.”

- *Login ID:* Enter the Login ID. This is not required, unless basic authentication has been set up on the web server by the Web Administrator.
 - *Password:* Enter the password for the user ID specified in the Login ID field. This is not required, unless basic authentication has been set up on the web server by the Web Administrator.
 - *Confirm Password:* Enter the password a second time as a confirmation. This is not required, unless basic authentication has been set up on the web server by the Web Administrator.
6. Click Save to save your entries.
 7. To add additional report nodes, select Add to return to the Search page.

The following fields are shared between the FTP/XCOPY Distribution Node page and the Http Distribution page:

- URL
- Description
- Operating System
- Login ID
- Password
- Confirm Password.

When you enter the information on one page, the information is also displayed on the shared fields of the other page but the fields are grayed out.

Note. If you complete the information for one protocol and then change your selection to another protocol, the shared fields will become active on the other page and grayed out on the original page. When you save, the system automatically clears the fields that are not shared.

Defining the Report Node to Use XCOPY

To define the report node to use XCOPY:

Note. If you use XCOPY the following parameters must be configured: URL, Operating System (must be Windows Server), Network Path (must be DOS or UNC paths and should be a shared directory with write permissions for the account running the Process Scheduler).

1. Select PeopleTools, Process Scheduler, Report Nodes.
2. Select Add a New Value, enter the Report node name, and click Add.
3. Select the FTP/XCopy option.

The FTP/XCopy Distribution page appears.

Report Node Definition page for XCOPY

- Enter the URL of the web server using this format:

http://<machine name>:<port number>/psreports/<site name>

Replace <machine name> with the name of your web server.

If you are using an http port other than 80, you need to specify the port number. <site name> refers to the directory where you installed the PIA files.

Note. If you installed the web server software with the default TCP port of 80, you do not need to specify the port number in the URL path. However, if you installed the web server to some other port, you must specify the port number in the URL path.

- Under Network Path replace <machine name> with the name of your machine.
Make sure that this directory is shared with the login or logins used to start Process Scheduler. Enter the UNC path that points to your Report Repository share.
- Select NT/Win2000 as the operating system.
- Select Save to save your entries.
- To add additional report nodes, select Add to return to the Search page.

Defining the Report Node to Use FTP

If you use FTP the following parameters must be configured: URL, Home Directory, Operating System, FTP Address, FTP ID, Password, Confirm Password. In addition, if your FTP server is a Windows server, you may have to set up the FTP service.

Note. The Distribution Agent will perform a validation after FTP has transferred files into the Report Repository by sending a query request to the web server. For this task to be accomplished, it is critical that the following setup is done:

JRE must be properly installed from the Process Scheduler server.

The value entered in the URL must be accurate. Verify that the machine name, port number, and site number are correct.

If either of these tasks are not done, the process request will get a status of NOT POSTED in the Process Monitor Detail page and will log the message "Unable to verify files posted."

To define the report node to use FTP:

1. Select PeopleTools, Process Scheduler, Report Nodes.
2. Select Add a New Value, enter the Report node name, and click Add.
3. Select the FTP/XCopy option.

The FTP/XCopy Distribution node page appears.

The screenshot displays the 'Report Node Definition' web page for an 'FTP/XCopy Distribution Node'. At the top, there are two tabs: 'Http Distribution Node' and 'FTP/XCopy Distribution Node', with the latter being selected. The main heading is 'Report Node Definition'. Below this, the 'Node Name' is set to 'FTP'. There are two radio buttons: 'Ftp/XCopy' (which is selected) and 'Http Information'. The 'Distribution Node Details' section includes a 'URL' field with the placeholder 'http://<machine name>/psreports/<site name>', a 'Home Directory' field with '\\<machine name>\psreports', a 'Description' field with 'FTP Sample', and an 'Operating System' dropdown menu set to 'NT/Win2000'. The 'Connection Information' section contains 'FTP Address' (placeholder '<machine name>'), 'Password' (placeholder '*'), 'FTP ID' (placeholder '<user id>'), 'Confirm Password' (placeholder '*'), and a 'Network Path' field. At the bottom, there are four buttons: 'Save', 'Notify', 'Add', and 'Update/Display'. A breadcrumb link at the bottom reads 'Http Distribution Node | FTP/XCopy Distribution Node'.

Report Node Definition page for FTP

4. Enter the URL of the web server using this format:

http://<machine name>:<port number>/psreports/<site name>

Replace *<machine name>* with the name of your web server. If you are using an http port other than 80, you need to specify the port number. The variable *<site name>* refers to the directory where you installed the PIA files; this will default to ps for the first installation.

Note. If you specify the Authentication Token Domain name during the PeopleSoft Pure Internet Architecture installation, you must include a fully qualified domain name for the URL instead of the IP address.

Note. If you installed the web server software with the default TCP port of 80, you do not need to specify the port number in the URL path. However, if you installed the web server to some other port, you must specify the port number in the URL path.

5. Enter the following additional parameters:
 - *Home Directory:* Specify the directory specified during the installation of PeopleSoft Pure Internet Architecture as the Report Repository. The FTP user ID must have write access to this directory. Note that this is not a required field for HTTP transfer, as the system uses the Report Repository directory specified at install time or the current directory assigned to ReportRepositoryPath in configuration.properties. Note that the value you enter for the Report Repository Path in the Web Profile at install time overrides any entry for ReportRepositoryPath in configuration.properties.

For Windows, the directory needs to match the Report Repository path. Make sure that you do not include any drive information—as in c:\psreports\—because you are using the FTP protocol to interpret this parameter.
 - *Description:* Enter a description of the server (optional).
 - *Operating System:* Select the operating system of the Report Repository.
 - *FTP Address:* Enter the machine name or the IP address of the Report Repository. If the name of the machine is used, it must be included on a DNS server.
 - *FTP ID:* FTP user ID.
 - *Password:* Enter the password for the user ID specified in the FTP ID field.
 - *Confirm Password:* Enter the password a second time as a confirmation.
6. Select Save to save your entries.
7. To add additional report nodes, select Add to return to the Search page.

Task 10-2-5: Setting Up the Distribution for Your Process Scheduler Server

To set up the Distribution Settings for your Process Scheduler Server:

1. Choose PeopleTools, Process Scheduler, Servers.
2. Enter the Server Name (such as PSNT). The Server Definition page appears.
3. Select the Distribution tab.

Server Definition **Distribution** Operation Notification Daemon

Server Name: PSNT

Server Distribution Details

Distribution Node Name:

Maximum Transfer Retries:

Interval for Transfer Attempt: seconds

Transfer System Files to Report Repository ☐

Save Return to Search Notify Add Update/Display

[Server Definition](#) | [Distribution](#) | [Operation](#) | [Notification](#) | [Daemon](#)

Server Definition page: Distribution tab

4. Click the lookup button to display the report node names and select the name of the required report node.
5. Enter a number for the Maximum Transfer Retries. This is the maximum number of times the server can try to send a report before it errors out.
6. Enter the number of seconds for the Interval for Transfer Attempt field. This is the interval between attempts to send the report.
7. Select the check box Transfer Log Files to Report Repository if you want to transfer all log and trace files from processes that do not generate reports.
8. Click Save to save your entries.
9. If Process Scheduler is running, you must reboot for any new settings to take effect.

To view reports (log files or system files) from Report Repository, you need to pass the authentication. Report Repository should be treated as a separate PeopleSoft Application. To navigate from PIA to Report Repository, you need to setup single signon in order to avoid getting prompt for second signon.

Task 10-2-6: Setting Up Sending and Receiving of Report Folders in the Report Manager

To be able to view reports in the Report Manager Explorer and List pages, you need to set up the sending and receiving of report folders in the Report Manager by activating the domain on which a sending and receiving server resides. Consult the documentation covering the PeopleSoft Integration Broker to learn how to activate the sending and receiving server domain.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Integration Broker*, “Using the Service Operations Monitor.”

Task 10-3: Setting Environment Variables

To set the appropriate Tuxedo environment variables, carry out these steps. (If you have already set these variables on the machine you are using as your Process Scheduler Server, you can skip this task.)

See “Installing Additional Components,” Installing Tuxedo on Windows.

To set the variables:

1. Choose Start, Settings, Control Panel.
2. Double-click the System icon.
3. Make sure that the NLSPATH environment variable is set.

NLSPATH does not need to be explicitly set since BEA/Tuxedo sets NLSPATH in its own registry tree. This value can be displayed using Control Panel, BEA/Tuxedo, on the Environment tab. However, the installation of certain products, such as IBM DB2 connectivity (DB2 UDB for z/OS and DB2 for Linux, UNIX, and Windows) sets NLSPATH to a value that causes Tuxedo to fail. The solution is to either set NLSPATH=c:\tuxedo\locale\c, or to delete it entirely and let Tuxedo pick up the value from its registry tree. If you are running DB2 for Linux, UNIX, and Windows, the solution instead is to append the c:\tuxedo\locale\c directory in the NLSPATH directory.

Task 10-4: Setting Up Process Scheduler Server Agent

This section discusses:

- Understanding Process Scheduler Server Agent
- Creating and Configuring a Process Scheduler Server
- Reconfiguring a Process Scheduler Server
- Verifying the Process Scheduler Server Status

Understanding Process Scheduler Server Agent

For installation purposes, you can use predefined server names and other definitions. The predefined name that you might use is as follows:

Server Name	Operating System
PSNT	Windows

To test this, use processes already defined in your PeopleSoft database. To set up a new server definition in your PeopleSoft database, refer to the Process Scheduler PeopleBook.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*

Note. When creating multiple Process Scheduler Servers for the same database, each server must have a unique server name. For example, two Process Scheduler Servers, both named PSNT, cannot run against the same database.

Task 10-4-1: Creating and Configuring a Process Scheduler Server

This section describes how to create and configure a Process Scheduler server.

Note. You can set Process Scheduler configuration parameters either by using PSADMIN, which provides an interactive dialog, or by editing the configuration file `psprcs.cfg` located in the `<PS_HOME>\appserv\prcs\database name` directory. The following steps assume you are using PSADMIN to specify parameter settings.

To create and configure a Process Scheduler Server:

1. From `<PS_HOME>\appserv` on the batch server, type `psadmin` and press ENTER to access the PeopleSoft Server Administration menu.
2. Select 2 to access the Process Scheduler submenus.

```
-----
PeopleSoft Server Administration
-----
1) Application Server
2) Process Scheduler
3) Search Server
4) Service Setup
q) Quit
```

Command to execute (1-4 q): 2

3. Select 4 from the PeopleSoft Process Scheduler Administration menu.

```
-----
PeopleSoft Process Scheduler Administration
-----
1) Start a Process Scheduler Server
2) Stop a Process Scheduler Server
3) Configure a Process Scheduler Server
4) Create a Process Scheduler Server Configuration
5) Delete a Process Scheduler Server Configuration
6) Edit a Process Scheduler Configuration File
7) Import an existing Process Scheduler Configuration
8) Show Status of a Process Scheduler Server
9) Kill a Process Scheduler Server
10) Clean IPC resources of a Process Scheduler Domain
q) Quit
```

Command to execute (1-9, q) : 4

4. When prompted for the name of the database that your server will access

Please enter name of Database that server will access :

enter the name of the database and press ENTER.

5. After the system creates the domain, you see the prompt

Would you like to configure this Process Scheduler Server now? (y/n) [y] :

Choose y; you'll see a Quick-configure menu something like this:

Quick-configure menu -- Scheduler for Database: HRDMO

Features =====	Settings =====
1) Master Schdlr : Yes	5) DBNAME : [HRDMO]
2) App Eng Server : Yes	6) DBTYPE : [MICROSFT]
	7) PrcsServer : [PSNT]
	8) UserId : [PS]
	9) UserPswd : [PS]
	10) ConnectID : [people]
	11) ConnectPswd: [peop1e]
	12) ServerName : []
	13) Log/Output Dir: [%PS_SERVDIR%\log_output]
	14) SQRBIN : [%PS_HOME%\bin\sqr\MSS\binw]
	15) AddToPATH : [%WINDIR%;%WINDIR%\SYSTEM32]
	16) DBBIN : [C:\<connectivity directory>]

Actions =====	
3) Load config as shown	
4) Custom configuration	
h) Help for this menu	
q) Return to previous menu	

HINT: Enter 5 to edit DBNAME, then 3 to load

Enter selection (1-16, h, or q):

Note. Cognos/Cube Manager Installs: Make sure to specify the proper path for Cognos in the *Add to Path* parameter. By default, that path is C:\Program Files\Cognos\cer2\bin;C:\ODI\OStore\bin. The Cognos and ODI are the important top level directories, and could change depending on the install.

6. If you need to modify any of these settings, enter the number next to the parameter name, type the new value, and press ENTER.

Parameter	Description
Master Schdlr	Flag to enable the Master Scheduler Server (PSMSTPRC). Default is to enable the server. See Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler.
App Eng Server	Flag to initiate Application Engine programs through the AE Tuxedo Server (PSAESRV). Default is set to run AE using PSAESRV. See Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler.

Parameter	Description
Load config as shown	Load the selections you made in the Quick Configure menu.
Custom configuration	Make custom selections in PSADMIN, using options that are not available in the Quick Configure menu.
DBNAME	Specify the database name that is associated with a PeopleSoft Process Scheduler Server Agent, such as HRDMO, FSDMO, SADMO, and so on.
DBTYPE	Specify the database type: MICROSOFT.
PrsServer	Specify the process server name. This must match the name defined in the Server Definition table, such as <i>PSNT</i> or <i>PSUNIX</i> .
UserId	Enter the user ID. For Enterprise Resource Planning (ERP), this is typically <i>VPI</i> , and for Human Resources (HR) it's <i>PS</i> .
UserPswd	Enter the user password. For Enterprise Resource Planning, this is typically <i>VPI</i> , and for Human Resources it's <i>PS</i> .
ConnectID	Enter the connect ID. This value is required.
ConnectPswd	Enter the connect password. This value is required.
ServerName	This value is required for Sybase users. This value is not required for Microsoft SQL Server users.
Log/Output Dir	Specify the directory in which files that are generated by the program are written. When PeopleSoft Process Scheduler initiates a process request, it creates a subdirectory in the format <Process Type ID> <Program Name> <Process Instance> that contains the generated files. For instance, the SQR program XRFWIN that ran with process instance 20 has all reports, trace, and log files in the subdirectory SQR_XRFWIN_20. It is also the optional directory used with the Output Destination field when scheduling a request. This variable (%%OutputDirectory%%) can be used in the File/Printer field of the Process Scheduler Request dialog box.
SQRBIN	Enter the path to the SQR executables.
AddToPATH	(Optional for Tuxedo) Specify an additional directory that is appended to the PATH environment variable.
DBBIN	Enter the path to the database drivers; that is, your connectivity software.

For descriptions of the PSADMIN options that do not appear in the Quick-configure menu, consult the following. For a basic install, in most cases you can accept the defaults.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*.

7. When you have updated the settings as needed, choose *3, Load config as shown*, from the Quick-Configure menu to save your settings to the Process Scheduler configuration file, `pstuxcfg`.
8. To start Process Scheduler, choose *1* and select the item number corresponding to your database to start.

Note. The correct Crystal and nVision libraries and components are automatically configured when Process Scheduler is booted.

Note. To stop Process Scheduler Server, choose *2, Stop a Process Scheduler Server*, from the PeopleSoft Process Scheduler Administration menu, and then enter the number corresponding to the name of the appropriate database.

Note. If you see the following message, then the server is already down:

```
Command to execute (1-2, q) [q]: 1
Loading command line administration utility ...
tmadmin - Copyright (c) 1996 BEA Systems, Inc.
Portions * Copyright 1986-1997 RSA Data Security, Inc.
All Rights Reserved.
Distributed under license by BEA Systems, Inc.
Tuxedo is a registered trademark.
No bulletin board exists. Entering boot mode.
> TMADMIN_CAT:111: ERROR: No such command.
```

Task 10-4-2: Reconfiguring a Process Scheduler Server

If you create and then immediately configure a Process Scheduler server, you can use the Quick-configure menu. However, if you want to update the configuration of an existing domain, or carry out a number of other administrative tasks, this handy shortcut is not available. Instead you can use PSADMIN as follows. Feel free to skip this procedure if you have already created and configured your Process Scheduler Server using the Quick-configure menu and want to move forward with your installation.

Note. If you want to configure the Process Scheduler Server while it is running, you need to stop and restart the server to load the new settings.

To reconfigure a Process Scheduler Server:

1. Start PSADMIN by entering:

```
cd <PS_HOME>\appserv
psadmin
```

2. Select 2 for Process Scheduler in the PeopleSoft Server Administration menu.
3. In the PeopleSoft Process Scheduler Administration menu, select 3 for Configure a Process Scheduler.
4. Select the database for which the Process Scheduler needs to be configured.
5. At the prompt

Do you want to change any config values (y/n)? [n]:

Specify *y* to start an interactive dialog that lets you examine or change parameter values.

6. Now you specify configuration parameters one by one. Configuration parameters are grouped into sections. At each section, you are asked whether to change any parameters—for example:

Values for config section - Startup

```
DBName=
DBType=
UserId=
UserPswd=
ConnectId=
ConnectPswd=
ServerName=
```

Do you want to change any values (y/n)? [n]:

- Specify *y* to change any parameter values for the current section. You are prompted for each parameter value. Either specify a new value or press ENTER to accept the default. After you press ENTER, you are positioned at the next parameter in that section. When you are done with that section, you are again asked whether you want to re-edit any of the values you changed.
 - If you do not want to change any values, specify *n* and you are prompted for the next configuration section.
7. Once you have selected all your parameters, you see this message

You will need to shut down and start up the server to read the new settings.

For descriptions of the Process Scheduler options in the PSADMIN, consult the following. In most cases you can accept the defaults.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*.

Task 10-4-3: Verifying the Process Scheduler Server Status

At this stage it is a good idea to verify the Process Scheduler Server status.

To verify the Process Scheduler Server status:

1. From the PeopleSoft Process Scheduler Administration menu, select option 8.

```
-----
PeopleSoft Process Scheduler Administration
-----
```

- ```
1) Start a Process Scheduler Server
2) Stop a Process Scheduler Server
3) Configure a Process Scheduler Server
```

- 4) Create a Process Scheduler Server Configuration
- 5) Delete a Process Scheduler Server Configuration
- 6) Edit a Process Scheduler Configuration File
- 7) Import an existing Process Scheduler Configuration
- 8) Show Status of a Process Scheduler Server
- 9) Kill a Process Scheduler Server
- 10) Clean IPC resources of a Process Scheduler Domain

q) Quit

Command to execute (1-10, q) : 8

2. To verify the status of the Process Scheduler Server for a specific database, type the number corresponding to the appropriate database.

For example:

Database list:

- 1) HRDMO

Select item number to start: 1

will verify the status of the Process Scheduler Server for the database HRDMO.

```

Loading command line administration utility ...
tmadmin - Copyright (c) 1996-1999 BEA Systems, Inc.
Portions * Copyright 1986-1997 RSA Data Security, Inc.
All Rights Reserved.
Distributed under license by BEA Systems, Inc.
Tuxedo is a registered trademark.

> Prog Name Queue Name Grp Name ID RqDone Load Done Current Service

BBL.exe 33728 PSSERVER+ 0 2 100 (IDLE)
PSMONITORSRV.e MONITOR MONITOR 1 0 0 (IDLE)
PSAESRV.exe 00101.00001 AESRV 1 0 0 (IDLE)
PSAESRV.exe 00101.00002 AESRV 2 0 0 (IDLE)
PSAESRV.exe 00101.00003 AESRV 3 0 0 (IDLE)
PSPRCRV.exe SCHEDQ BASE 101 0 0 (IDLE)
PSMSTPRC.exe MSTRSCHQ BASE 102 0 0 (IDLE)
PSDSTSRV.exe DSTQ BASE 103 0 0 (IDLE)

> Prog Name Queue Name # Serve Wk Queued # Queued Ave. Len Machine

PSDSTSRV.exe DSTQ 1 - 0 - PSSERVER1+

>

```

#### Verifying Status

You can also verify the status of the Process Scheduler Server from Process Monitor in PIA. To verify the Process Scheduler Server status from the Process Monitor page, go to PeopleTools, Process Scheduler, Process Monitor, and select *Server List*.

If the user has the process security rights to update the server status, the *Refresh* button can be used to refresh the screen, too.





```

PeopleSoft Server Administration

1) Application Server
2) Process Scheduler
3) Search Server
4) Service Setup
q) Quit

```

Command to execute (1-4, q): 4

5. Select 1 from the PeopleSoft Services Administration menu.

```

PeopleSoft Services Administration

1) Configure a Service
2) Install a Service
3) Delete a Service
4) Edit a Service Configuration File
q) Quit

```

Command to execute (1-4, q) : 1

When asked if you want to change configuration values, enter y.

6. Enter the name of the Process Scheduler databases that you intend to include as part of the Windows service.

```

Values for config section - NT Services
Service Start Delay=60
Application Server Domains=HR840
Process Scheduler Databases=HR840

```

Do you want to change any values (y/n)? [n]:

If you specify more than one Process Scheduler database, separate each entry with a comma.

---

**Note.** You can take advantage of a new setting when using PSADMIN to set up Process Scheduler Servers or application servers as a Windows service. The Windows Service psntrsv.exe automatically starts application servers and Process Scheduler Servers that reside on the same Windows machine. Occasionally, psntrsv.exe would attempt to initiate a connection between an application server or Process Scheduler Server and a database on the same machine that was not ready to receive requests. As a result the connection would fail. Now when you set up Process Scheduler or an application server as a Windows Service, the Service Start Delay setting lets you specify a delay, in seconds, that elapses before a service attempts to start any application server domains or Process Scheduler Servers. This allows the RDBMS to boot and become available to accept requests. The default setting for the Service Start Delay parameter is 60 seconds.

---

---

**Note.** The NT Services section of the PSADMIN modifies the psntrsv.cfg file located in the <PS\_HOME>\appserv directory. You can edit this file manually by selecting *4, Edit a Service Configuration File* from the PeopleSoft Services Administration menu. If you edit it, you need to delete and then install the service again.

---

7. Select option 2 from the PeopleSoft Services Administration menu.

```

PeopleSoft Services Administration

1) Configure a Service
2) Install a Service
3) Delete a Service
4) Edit a Service Configuration File
q) Quit

```

Command to execute (1-4, q) : 2

8. Return to the Control Panel, choose *Administrative Tools*, and launch the *Services* utility.
9. On the Services dialog, scroll to find the entry that adheres to the following naming convention, and select it:

PeopleSoft <PS\_HOME>

---

**Note.** The default Startup mode is Manual.

---

10. Click *Startup*.
11. On the Service dialog in the Startup Type group, select *Automatic*, and in the Log On As group, select *System Account*. Then click OK.

---

**Note.** The *Log On As* setting needs to reflect that which you set for your BEA ProcMGR V9.1 and Tlisten processes. PeopleSoft recommends that you set these services to *System Account* when you install Tuxedo. The *Log On As* value only affects the application server because Process Scheduler runs independently from Tuxedo. See the chapter “Installing Additional Components” for more information on installing Tuxedo, and refer to the chapter “Configuring the Application Server” for the details on configuring the application server.

---

12. On the Services dialog, make sure the PeopleSoft service is selected, and click Start.
13. Use the Process Monitor to verify that the Process Scheduler Server is running. You can also use Task Manager to verify that the executables involved with the service are running.

For the Process Scheduler, make sure that the psprcsrv.exe is running. If you have customized the name of psprcsrv.exe, make sure the appropriate executable is running.

---

## Task 10-6: Configuring the Process Scheduler for Word for Windows (Optional)

Some applications process documents using Word for Windows. Here is how to configure Word to work with the Process Scheduler.

---

**Note.** Microsoft Word must already be installed on the server; it is not included with the PeopleTools install.

---

---

**Note.** If spaces exist in the WINWORD path in the Process Scheduler configuration file (psprcs.cfg), WinWord reports will fail. You will need to modify the Process Type Definition and add quotes around the entry in the Command Line field, for example "%%WINWORD%%\winword.exe".

---

To configure Process Scheduler for Word for Windows:

1. Edit the Process Scheduler configuration file. In the [Process Scheduler] section, edit the WINWORD entry so that it points to the directory where winword.exe is installed—for example, WINWORD=C:\Apps\Office2000\Office.

---

**Note.** The Process Scheduler configuration file psprcs.cfg is located in <PS\_HOME>\appserv\prcs\database name directory.

---

2. Change the Microsoft Word macro security to allow macros to be run. Start Microsoft Word and select *Tools, Macro, Security*. Select the *Low* security setting and click *OK*.

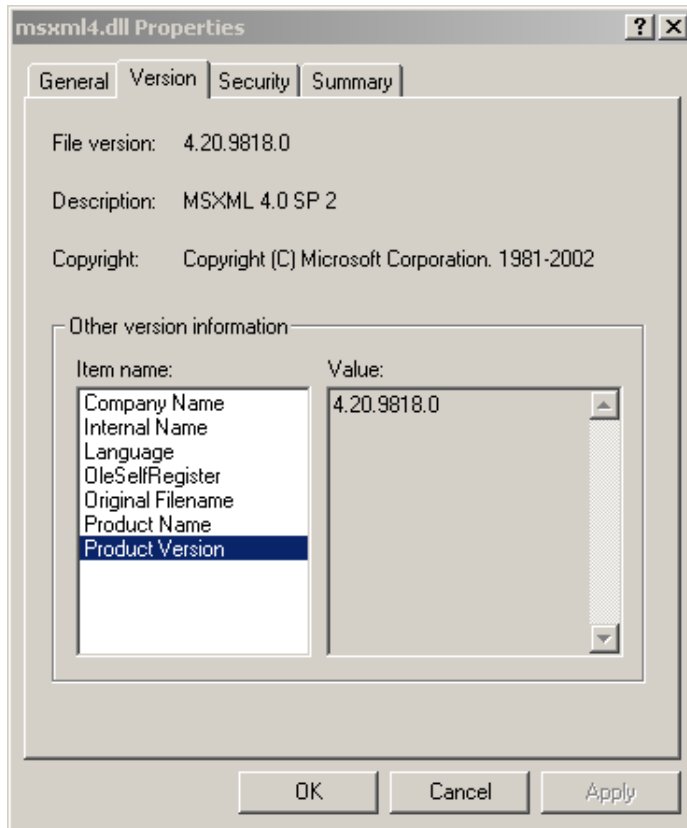
---

## Task 10-7: Configuring Setup Manager

Before you can use PeopleTools Setup Manager, you must fulfill these requirements:

- To use the Excel to CI template-generation feature of Setup manager, the Process Scheduler must be PSNT. That is, Process Scheduler must be installed on a Windows machine.
- Process Scheduler must be running.
- Any Process Scheduler environment variables (especially %PS\_FILEDIR%) must be specified.
- Microsoft Office 2000 must be present on the process scheduler server, and Microsoft Excel must be installed.
- The MSXML COM object for Excel, msxml4.dll, must be present on the system.

For confirmation, navigate to %SystemRoot%\system32\msxml4.dll. Right-click and select Properties, Versions, Product Version. The version number must be 4.20 or above.



msxml4.dll Properties dialog box

**See Also**

*Enterprise PeopleTools 8.49 PeopleBook: Setup Manager*

Microsoft support, [support.microsoft.com](http://support.microsoft.com)

## CHAPTER 11

# Installing and Configuring Software for Crystal Reports

This chapter discusses:

- Understanding Crystal Reports Software Installation and Configuration
- Determining the Crystal Reports Runtime Environment
- Installing Crystal Reports 9
- Installing BusinessObjects Enterprise XI
- Migrating your BusinessObjects Enterprise XI Installation to a New Version of PeopleTools
- Installing Crystal Reports XI
- Removing Crystal Reports XI
- Administering and Using BusinessObjects Enterprise XI
- Converting Crystal Reports

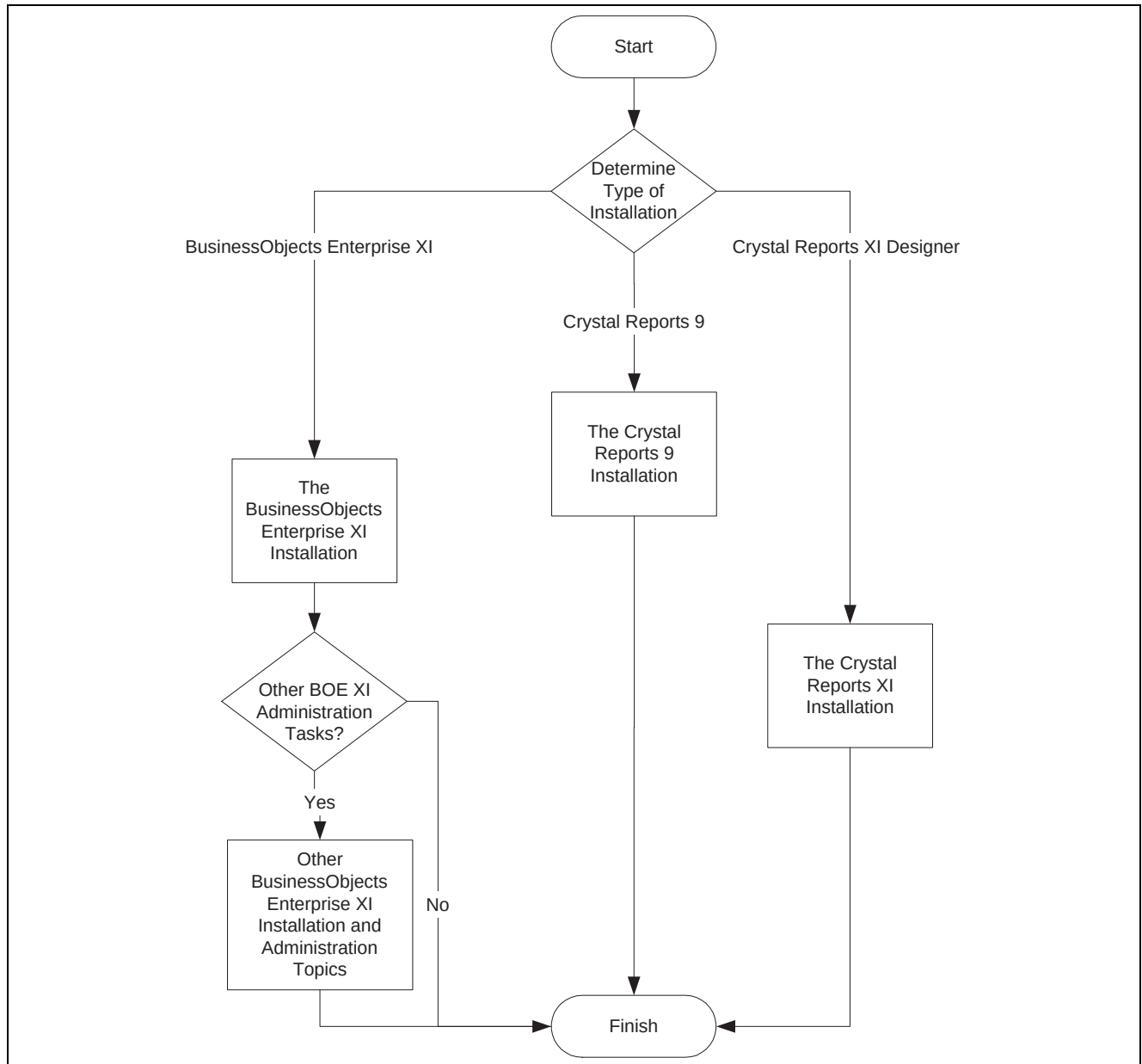
---

## Understanding Crystal Reports Software Installation and Configuration

This chapter addresses the installation and administration of your Crystal Reports environment. Depending on the type of installation that you have, some parts of this chapter may not be relevant to you.

The chapter is divided into sections. Within each section are parts that provide informative background information or describe installation and administration tasks.

The following flowchart describes how to use the information in this chapter to install and configure the software that you need to run Crystal Reports on your PeopleSoft system:



Chapter navigation

## See Also

*Enterprise PeopleTools 8.49 PeopleBook: Crystal Reports for PeopleSoft*

PeopleSoft Customer Connection (Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms, PeopleSoft Enterprise)

---

## Task 11-1: Determining the Crystal Reports Runtime Environment

PeopleSoft applications are delivered to work with the Crystal Reports 9 runtime environment. Process scheduler report definitions are configured to use the Crystal Reports 9 print engine, and the Crystal report definition files delivered by PeopleSoft are in the Crystal 9 format. You use the Crystal Reports 9 product to create and edit report definitions.

If you are using PeopleTools 8.49 *and* are using PeopleSoft applications at Release 9 or higher, you can optionally use the BusinessObjects Enterprise XI runtime environment to run and view your reports. You use the Crystal Reports XI product to create and edit report definitions.

For any particular PeopleSoft application you must use either Crystal 9 or BusinessObjects Enterprise XI—you cannot run a “mixed” environment where some reports are run using Crystal 9 and some reports are run using BusinessObjects Enterprise XI.

If you decide to use BusinessObjects Enterprise XI, you can run a PeopleSoft supplied conversion program to convert report definitions from Crystal 9 format to Crystal XI format. There is no conversion program to convert from Crystal XI format to Crystal 9 format.

The advantages of BusinessObjects Enterprise XI (compared to Crystal Reports 9) are:

- Runs on other operating systems (Solaris, AIX, Linux) besides Windows
- Runs on a scalable server platform; that is, you can scale across machines
- Users can view interaction reports over the web (such as search, filter, or table of contents).

The restrictions of the PeopleSoft Integration with BusinessObjects Enterprise XI are:

- The PeopleSoft Process Scheduler that you use to run reports on the BusinessObjects Enterprise XI server can run only on one of the operating systems that BusinessObjects Enterprise XI runs on.
- You need to convert all your reports from Crystal 9 format to Crystal XI format to run them using BusinessObjects Enterprise XI.
- The PeopleSoft Integration does not support some platforms that a standalone BusinessObjects Enterprise XI installation supports.

That is, not all platforms that BusinessObjects Enterprise XI runs on were tested in the integrated BusinessObjects Enterprise XI/PeopleSoft solution. For example, while standalone BusinessObjects Enterprise XI support Tomcat as a web server, the integrated BusinessObjects Enterprise XI/PeopleSoft solution does not.

The advantages of using Crystal Reports 9 are:

- Works the same as previous releases of PeopleTools
- Requires little configuration and administration
- Run to Crystal Reports 9 from Windows Query Designer is available
- Does not require a database management system for report management
- Report output is smaller in size compared to BusinessObjects Enterprise XI, as the latter contains more internal information about the report.

The observed difference in tests indicates that report output generated from BusinessObjects Enterprise XI will be 30 to 40% larger. This may vary by report and by the amount of business data in the report.

One restriction on Crystal Reports 9 is that it runs only on Windows.

---

## Task 11-2: Installing Crystal Reports 9

This section discusses:

- Understanding the Crystal Reports 9 Installation
- Installing Crystal Reports 9

### Understanding the Crystal Reports 9 Installation

Crystal Reports 9 is packaged with PeopleSoft. The Crystal Reports installation is required for Windows-based workstations (also referred to as the PeopleTools Development Environment) where reports will be designed. Workstations that will only run existing reports via Process Scheduler do not need Crystal Reports. The functionality for running these reports on the client is provided in DLLs that are installed when you run Client Setup in Configuration Manager.

---

**Note.** Depending upon the languages you licensed from PeopleSoft, you may receive more than one Crystal Reports CD-ROM. You should repeat the following installation instructions for each language of Crystal Reports that you plan to use in the PeopleTools Development Environment.

---

---

**Note.** Although some versions of Crystal Reports include web server applications such as Web Component Server, they are not tested, certified, or supported by PeopleSoft.

---

You can install Crystal Reports 9 locally on a workstation where reports will be designed, or on a Windows batch server where Crystal Reports will be executed by Process Scheduler. You can also install Crystal Reports to a network file server; typically it would be installed to a subdirectory of the <PS\_HOME> directory. If you install Crystal Reports to a network file server, you need to run a Crystal Reports setup on each Windows-based workstation or batch server where Crystal Reports will be run. To do so, make sure to select the Complete installation when running the CD setup program.

---

**Note.** When installing Crystal Reports to a Netware file server, the ideal solution is to use Windows as the installation workstation environment. If, however, you are installing Crystal under Windows 95 to a Novell file server, install Crystal on a local drive and then copy the Crystal directory to the Novell server from an MS-DOS command prompt.

---

### See Also

*Enterprise PeopleTools 8.49 PeopleBook: Crystal Reports for PeopleSoft*, “Using Crystal Reports 9”

## Task 11-2-1: Installing Crystal Reports 9

To install Crystal Reports 9:

1. Insert the Crystal CD into your CD-ROM drive and run the setup program from the root of the drive.

---

**Note.** If you are installing to a network, you must run `setup.exe` from the command prompt with the `/a` option, as in `<path>setup.exe /a`.

---



The install program will search for any previous version of Crystal and then present a Welcome message.

2. Click Next.

A license dialog box appears.

3. Select the I accept the License Agreement radio button and click Next.

A window appears with the possible installation types.

4. Select the Typical radio button. If necessary, use the Browse button to set your destination folder.

5. Click Next.

A screen appears displaying the features you have selected. Review and modify your selections if necessary.

6. Click Next.

You are prompted to start the installation or go back to modify any of the information added.

7. Select Next to begin the installation.

A progress screen appears.

8. Select Finish to complete the installation.

---

**Note.** For additional instructions on installing the Crystal Reports CD-ROM, see the Crystal installation documentation, which is delivered in the \DOCS directory of the Crystal Reports CD as install.rtf.

---

---

**Note.** To install Crystal on a local machine but run it from the network, consult the Crystal documentation.

---

---

**Note.** If you are upgrading your system to PeopleTools 8.49 from a version of PeopleTools earlier than an 8.x version, you may have to convert your custom Crystal report definitions to Crystal 9. Please see the section Converting Crystal Reports for additional information and tasks.

---

If this is not the case, at this point if you are using Crystal 9 you are finished. Ignore the rest of the chapter as it addresses BusinessObjects Enterprise XI exclusively.

---

## Task 11-3: Installing BusinessObjects Enterprise XI

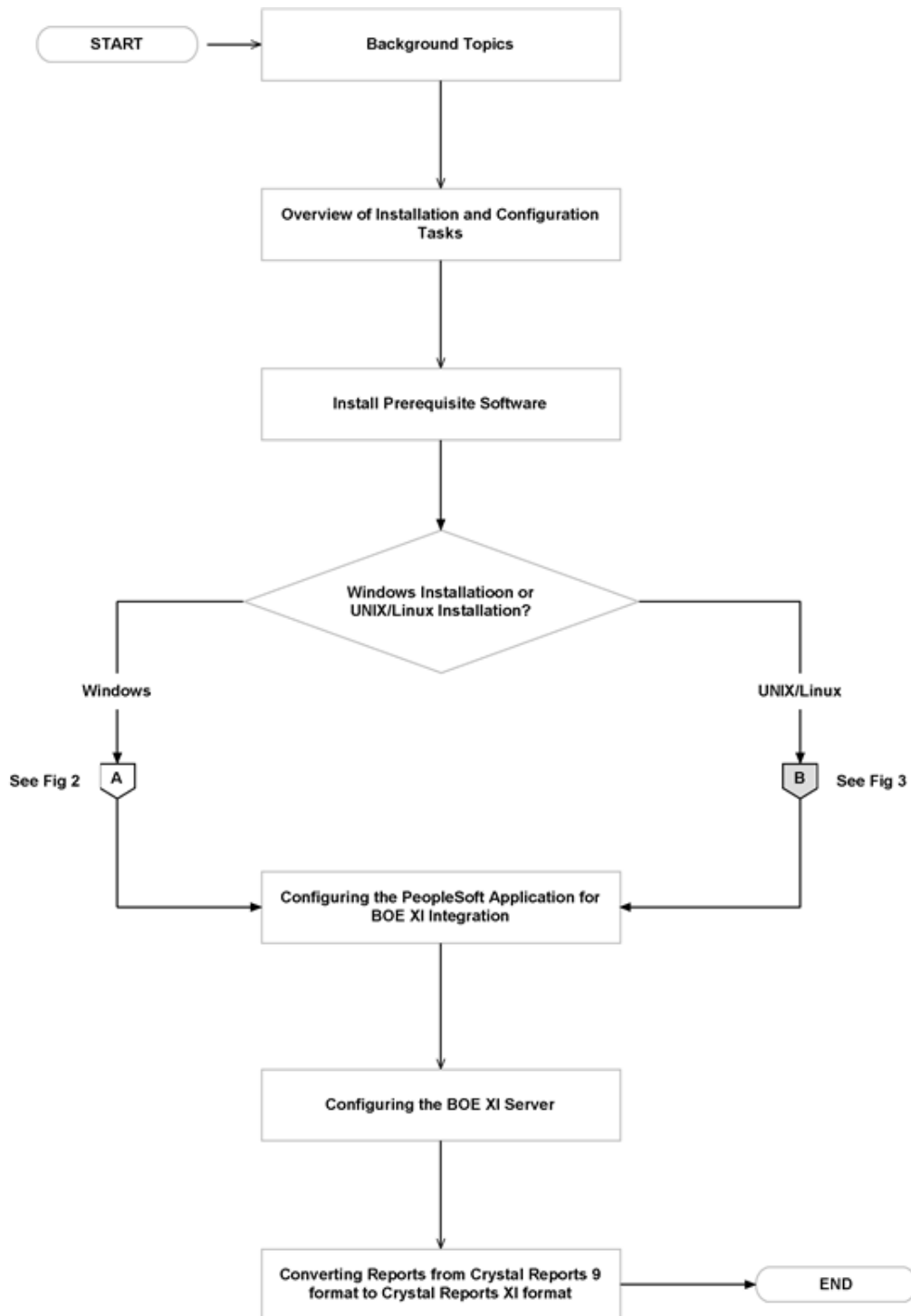
This section discusses:

- Understanding the BusinessObjects Enterprise XI Installation
- Understanding Integration Between BusinessObjects Enterprise XI and PeopleSoft Enterprise
- Understanding Query Access Services
- Reviewing Key BusinessObjects Enterprise XI Components
- Planning your BusinessObjects Enterprise XI Integration
- Installing the PeopleSoft Application Environment
- Installing BusinessObjects Enterprise XI on Windows
- Installing BusinessObjects Integration Kit for PeopleSoft on Windows
- Installing BusinessObjects Enterprise XI Integration on Windows

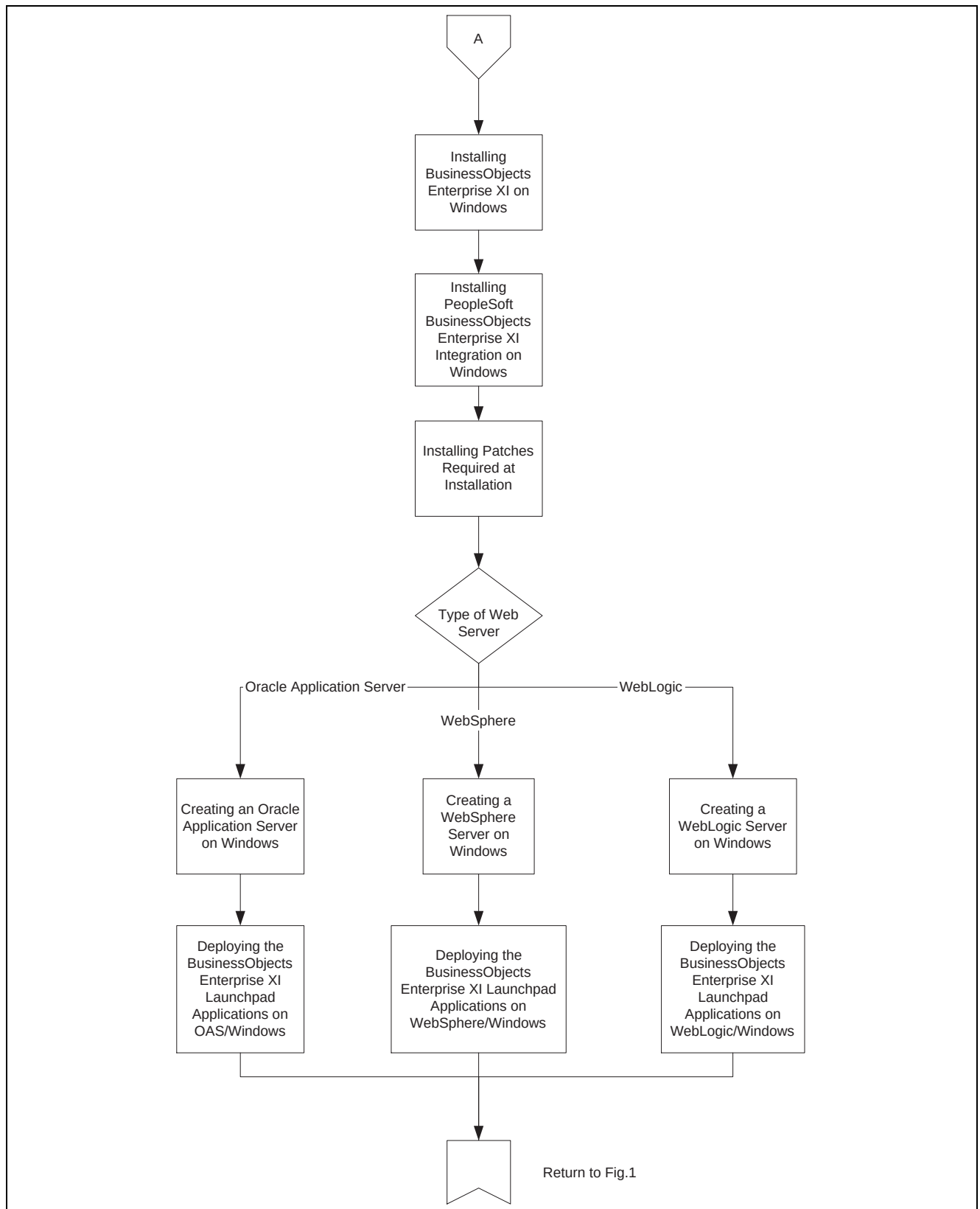
- Installing TrueType Fonts on Windows
- Installing Special Fonts on Windows
- Installing Patches Required at Installation Time
- Creating a Web Server for BusinessObjects Enterprise XI on Windows
- Installing BusinessObjects Enterprise XI on UNIX or Linux
- Installing BusinessObjects Integration Kit for PeopleSoft on Unix
- Installing PeopleSoft BusinessObjects Enterprise XI Integration on UNIX or Linux
- Installing TrueType Fonts in UNIX or Linux
- Installing Special Fonts in UNIX or Linux
- Installing Patches Required at Installation
- Creating a Web Server for BusinessObjects Enterprise on UNIX or Linux
- Confirming Access to the BusinessObjects Enterprise XI Administration and User Launchpad Applications
- Configuring the PeopleSoft Application for BusinessObjects Enterprise XI Integration
- Configuring the BusinessObjects Enterprise XI Server
- Verifying the PeopleSoft to BusinessObjects Enterprise XI Integration

## **Understanding the BusinessObjects Enterprise XI Installation**

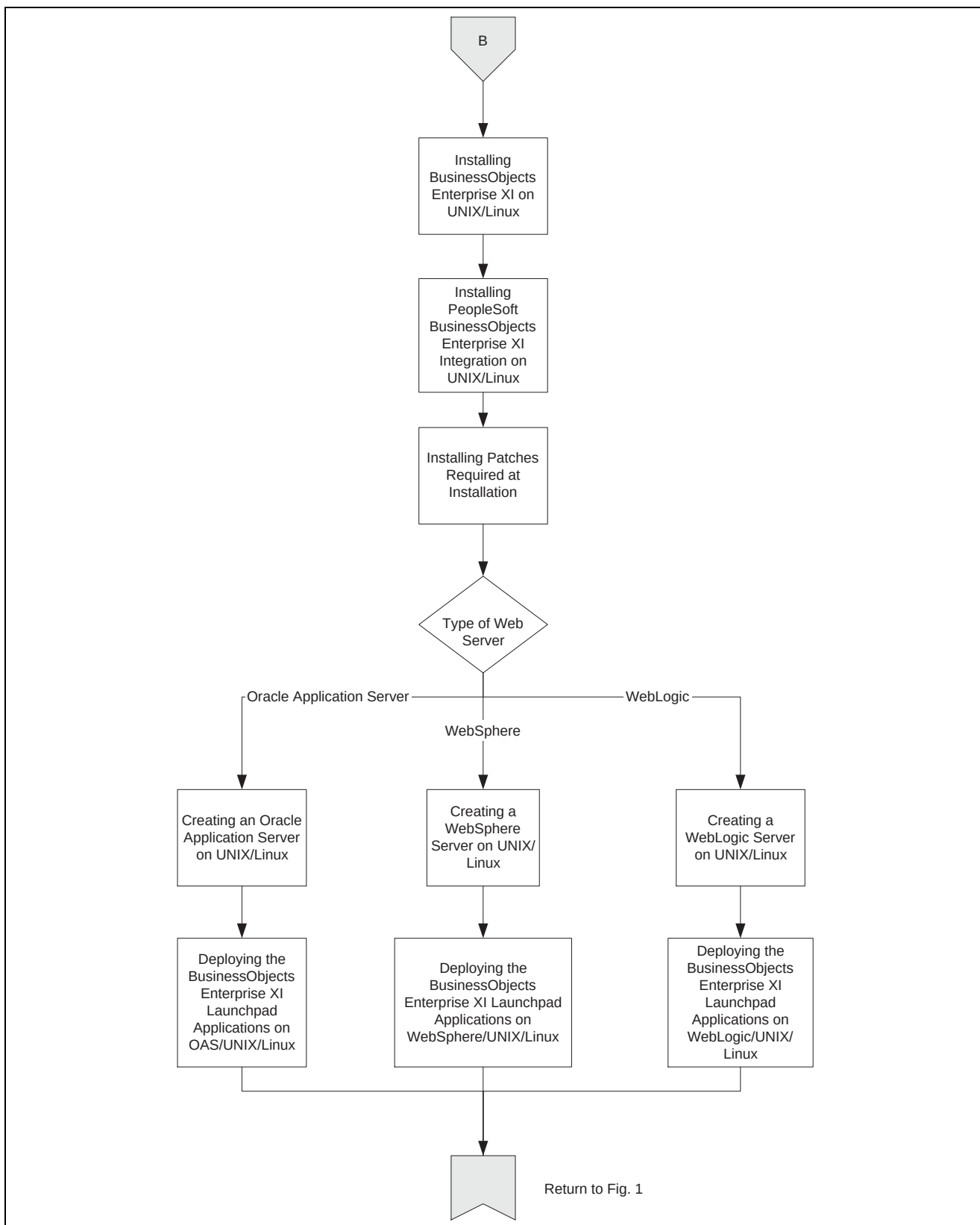
Use the following flowcharts to understand which parts of this section are relevant to your particular circumstances.



Navigating the BOE XI installation and configuration - Figure 1



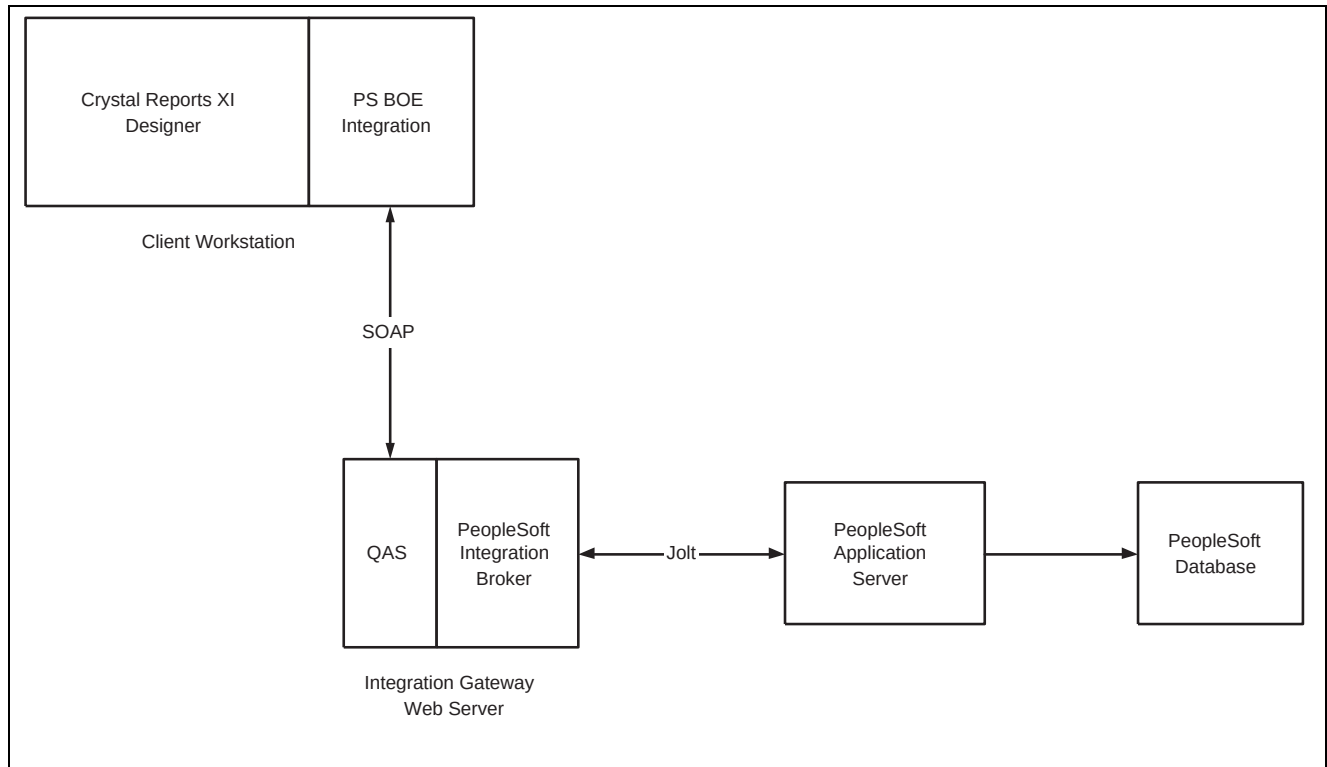
Navigating the BOE XI installation and configuration - Figure 2



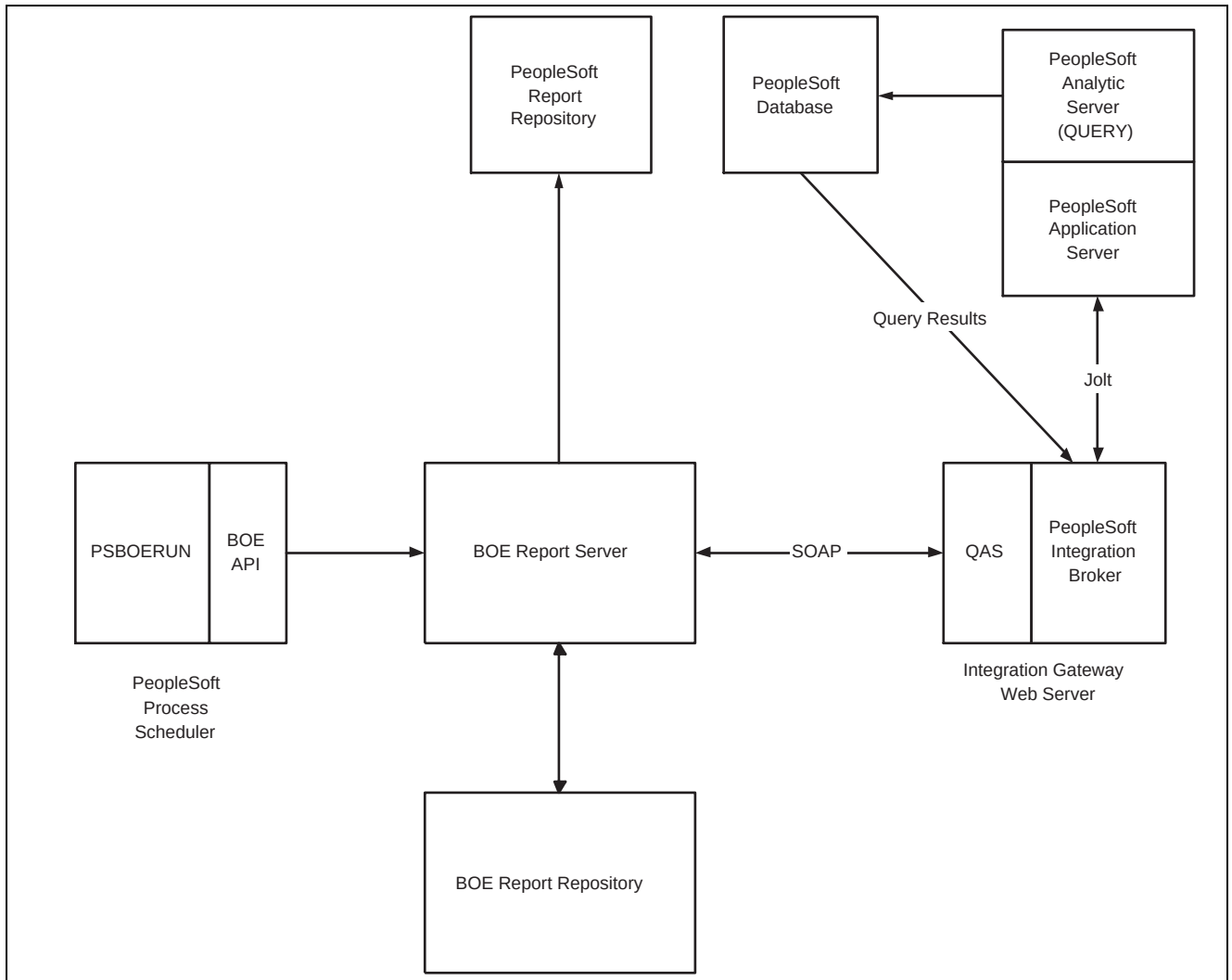
Navigating the BOE XI installation and configuration - Figure 3

## Understanding Integration Between BusinessObjects Enterprise XI and PeopleSoft Enterprise

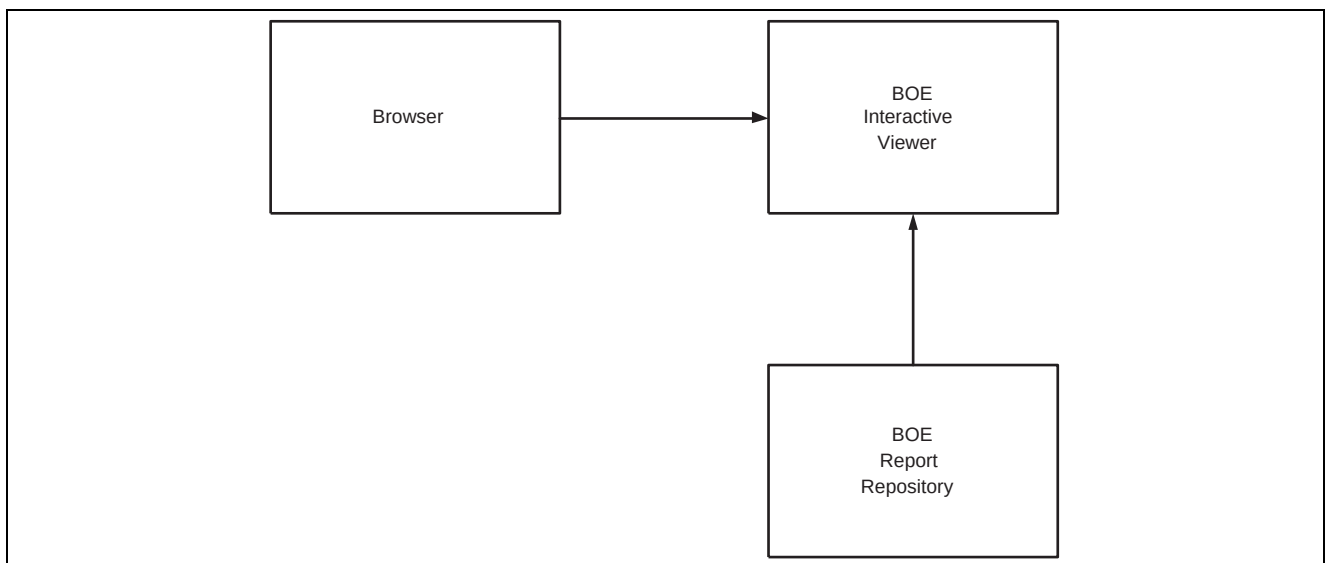
PeopleSoft Enterprise, together with Business Objects, provides a robust suite of reporting tools to be used with PeopleSoft products. The diagrams below illustrates how BusinessObjects Enterprise XI integrates with PeopleSoft Enterprise.



Design a report



Run a report



View a report stored in the BusinessObjects Enterprise XI Repository

Implementation of this integration requires:

- installation of BusinessObjects Enterprise XI server
- installation of PeopleSoft-specific components on the BusinessObjects Enterprise server
- configuration tasks in your PeopleSoft database
- configuration tasks in your BusinessObjects Enterprise XI server
- conversion of Crystal report definitions from Crystal 9 format to Crystal XI format.

BusinessObjects Enterprise XI for PeopleSoft Enterprise interacts with PeopleSoft Enterprise security server using a plug-in. This integration provides single signon and ensures the synchronization of users and roles between PeopleSoft Enterprise and BusinessObjects Enterprise XI. Using a data driver that calls the Query Access Services, BusinessObjects Enterprise receives data from PS Query and builds a report using Report Application Server (RAS) API.

## Understanding Query Access Services

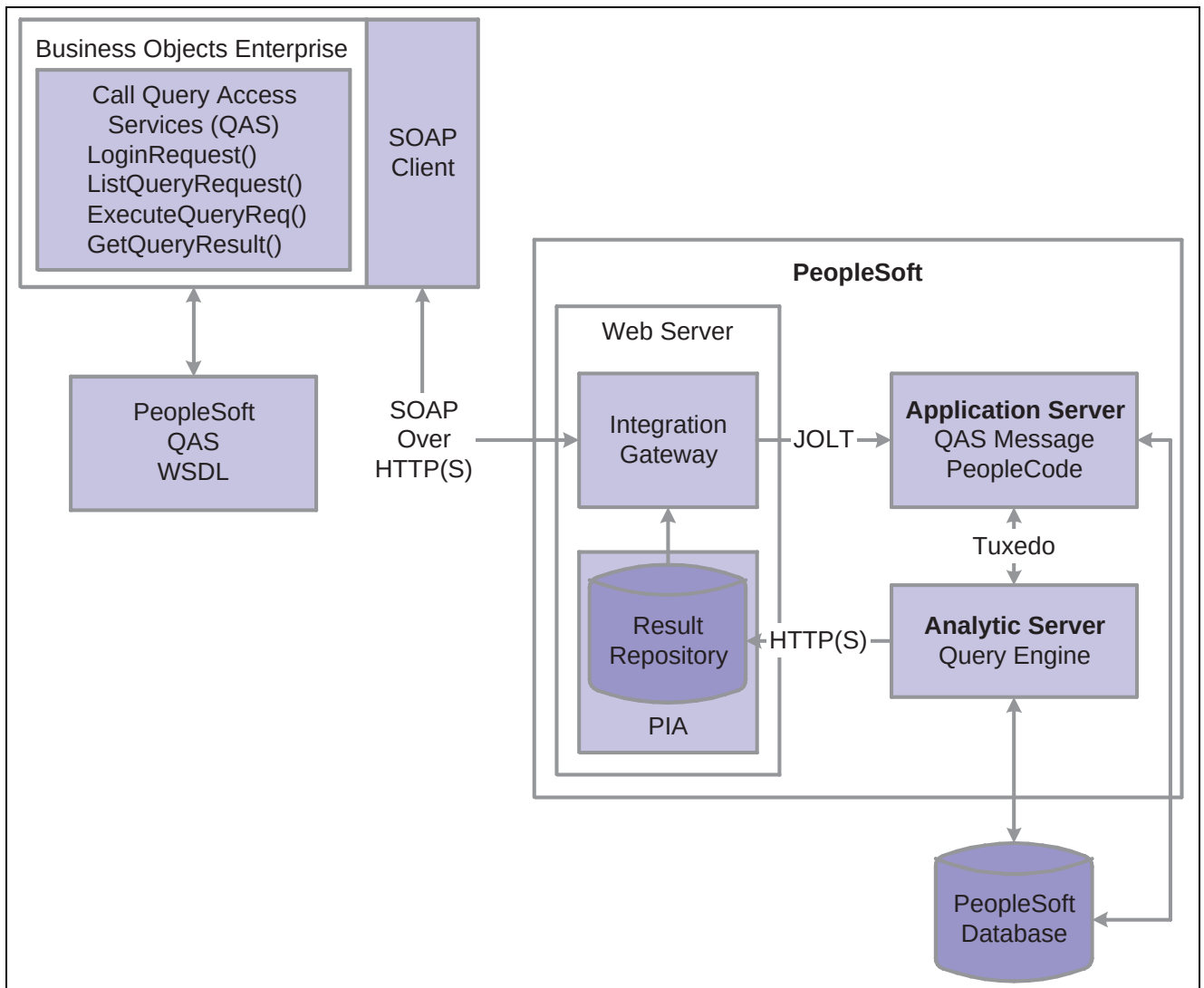
The primary goal of Query Access Services (QAS) is to provide streaming PeopleSoft query results to BusinessObjects Enterprise over the web to create Crystal reports.

QAS plays the following roles in BusinessObjects Enterprise XI for PeopleSoft Enterprise:

- Provides a mechanism for the BusinessObjects Enterprise XI to access Query metadata so that users can design Crystal Reports based on the queries.
- Provides a mechanism for the BusinessObjects Enterprise XI to obtain results for a query to be used in report definitions.

The following diagram illustrates the QAS architecture:





Query Access Services architecture

The following sections describe the components in the Query Access Services architecture:

- **Integration Gateway**

The Integration Gateway receives every Simple Object Access Protocol (SOAP) request coming from BusinessObjects Enterprise XI. The Gateway forwards the request to the integration engine running on the web server.

- **Web Server**

The Integration Gateway resides on a PeopleSoft web server that generates the URL to navigate inside BusinessObjects Enterprise. The Integration Gateway receives every SOAP request coming from BusinessObjects Enterprise over HTTP/HTTPS. Using the QueryListening Connector class, results are received directly from the report repository.

- **Application Server**

PeopleCode running on the application server implements most of the QAS services and generates the required response. The integration engine is installed on an application server as part of the PeopleSoft application.

- **Analytic Server**

The Analytic server provides asynchronous query execution. The query engine is embedded in the analytic server. When a query execution request arrives, the PeopleCode delegates the request to one of the available analytic servers running within the same application server domain. The query engine starts executing the query based on the input parameters.

- Result Repository

Once the query engine fetches the first block of results, it encapsulates the results in a well-defined XML format and posts the XML data in the Result Repository.

- BusinessObjects Enterprise XI

When BusinessObjects Enterprise XI makes a request to obtain the XML data from the Report Repository, the request is authenticated and the data is sent directly from the report repository.

## Reviewing Key BusinessObjects Enterprise XI Components

BusinessObjects Enterprise involves the interaction of the following components:

- Central Management Console (CMC)

The Central Management Console (CMC) enables you to perform administrative tasks. Administrative tasks include authenticating users, granting rights to groups, adding domains, mapping PeopleSoft roles with BusinessObjects Enterprise roles, and adding users.

- Security Plugin

The Central Management Server uses the BusinessObjects Enterprise XI security plug-in to verify the user name and password against the system database. In the context of BusinessObjects Enterprise for PeopleSoft Enterprise, the security plug-in enables you to map user accounts and groups from PeopleSoft into BusinessObjects Enterprise XI. The user names and passwords are authenticated against the BusinessObjects Enterprise XI user list that is synchronized with the users and roles in the PeopleSoft database.

## Task 11-3-1: Planning your BusinessObjects Enterprise XI Integration

This section discusses:

- Installing Prerequisite Software
- Configuring UNIX Environment Variables

---

**Note.** These are steps that should be done prior to starting the installation and configuration of PeopleTools and BusinessObjects Enterprise XI. Completing these tasks will make the installation and configuration process proceed smoothly.

---

### Installing Prerequisite Software

Several different alternative software packages are supported for BusinessObjects Enterprise XI. These alternatives are listed in the PeopleTools 8.49 Hardware and Software guide. Additional detailed information on specific release levels supported is available online on Customer Connection.

See *Enterprise PeopleTools 8.49 Hardware and Software Requirements*.

- Operating System

Before you begin to install BusinessObjects Enterprise XI on UNIX or Linux operating systems using terminal emulation, make sure that you are using an X-Windows terminal emulation program.

---

**Note.** You can install BusinessObjects Enterprise XI from the server console or with X-Windows terminal emulation software such as Cygwin. Telnet and ssh clients, such as Putty, will not allow you to install the software properly.

---

- Database Software

BusinessObjects Enterprise XI requires a relational database, which stores report definitions as well as report output. Oracle, DB2 LUW, Microsoft SQL Server, and Sybase are all supported database platforms.

The database server software can run on a different machine in the same network as your installation of BusinessObjects Enterprise XI

Before you begin to install BusinessObjects Enterprise XI, you should identify the database server that you want to use. Make note of the database or schema name, user account name, and password for the database, as you will need this information to complete the BusinessObjects Enterprise XI installation. A database must exist, which will become the Central Management Server database.

If the database platform is Microsoft SQL Server, and BusinessObjects Enterprise XI is installed on the same machine as SQL Server, then the BusinessObjects Enterprise XI installation wizard will create the database automatically. If you are using any other database management system, you must create the database manually prior to installing BusinessObjects Enterprise XI.

---

**Note.** Microsoft SQL Server can only be used if BusinessObjects Enterprise XI is installed on Windows.

---



---

**Note.** MySQL is not a supported database platform for the integration between PeopleTools and BusinessObjects Enterprise XI.

---

1. Echo the following environment variables and ensure that their values correspond to your database client software installation.

This example checks the required variables, and shows sample output values:

```
$ echo $SYBASE
/opt/sybase/15.0.1
$ echo $SYBASE_OCS
OCS-15_0
$ echo $LD_LIBRARY_PATH
/export/home/sybase/15.0.1/OCS-15_0/lib
$ echo $SYBASE_ASE
ASE-15_0
$ echo $PATH
/usr/bin:/usr/ucb:/etc:/usr/local/bin:/usr/X11R6/bin:/export/home/sybase/15.0/OCS-15_0/bin
```

2. Issue the following command to run the Sybase SQL tool and connect to the database server:

```
isql -U user -P password -S servername
```

Replace user, password, and servername with the appropriate values. If the shell environment has been configured correctly, you are connected to Sybase.

3. Issue the following command to ensure that the account has permission to create tables:

```
use aps
```

```

go
create table sampletable (def_field char(10))
go
sp_help sampletable
go

```

4. Issue the following command to ensure that the account has permission to delete tables:

```

drop table sampletable
go
sp_help sampletable
go

```

5. Type quit.

- Database Connectivity Software

BusinessObjects Enterprise XI runs under a web server and requires a database, which stores report definitions as well as report output. In order for BusinessObjects Enterprise XI to communicate with the database software, the appropriate database client connectivity software must be installed on the server running BusinessObjects Enterprise XI.

Before you begin to install BusinessObjects Enterprise XI, install the appropriate database connectivity software on the server where BusinessObjects Enterprise XI will reside.

- Java SDK

If your web application server software does not automatically install the Java SDK as part of its installation process, you must install the J2SE SDK first. Ensure that your machine's PATH environment variable includes the Java SDK bin directory.

- Web Application Server Software

BusinessObjects Enterprise XI runs under a web application server, either Oracle Application Server (OAS), BEA WebLogic, or IBM WebSphere. Before you begin to install BusinessObjects Enterprise XI, install the appropriate web server software on the server where BusinessObjects Enterprise XI will reside.

---

**Note.** You must install BusinessObjects Enterprise XI with the same user account as that used to install the web server software.

---

See “Installing Web Server Products.”

The instructions in this section assume BusinessObjects Enterprise XI is installed on one server machine that is separate from the machine on which you have installed (or will install) the PeopleSoft software.

## Configuring UNIX Environment Variables

To configure environment variables for UNIX platforms:

1. Set the JAVA\_HOME environment variable:

```
JAVA_HOME= java_installDirectory; export JAVA_HOME
```

2. Set LC\_ALL and LANG environment variable to your preferred locale in your login environment. For example:

```
LANG=en_US.UTF-8
```

```
LC_ALL=en_US.UTF-8
```

3. Run the `locale` command to verify that all of the related locale environment variables were properly set by `LC_ALL`. For example:

```
st-sun17:$ locale
LANG=en_US.UTF-8
LC_CTYPE="en_US.UTF-8"
LC_NUMERIC="en_US.UTF-8"
LC_TIME="en_US.UTF-8"
LC_COLLATE="en_US.UTF-8"
LC_MONETARY="en_US.UTF-8"
LC_MESSAGES="en_US.UTF-8"
LC_ALL=en_US.UTF-8
```

---

**Note.** If the `locale` command does not return values exactly like this, contact your system administrator to set the values properly.

---

## Task 11-3-2: Installing the PeopleSoft Application Environment

Install your PeopleSoft application environment as you normally would. There are special configuration steps that you will have to perform later in order to complete the integration of PeopleSoft with BusinessObjects Enterprise XI.

---

**Note.** In order for the integration between PeopleSoft and BusinessObjects Enterprise XI to work, the PeopleSoft Process Scheduler must be installed on an operating system that BusinessObjects Enterprise XI supports. This is because PSBOERUN.EXE, the PeopleSoft process that calls BusinessObjects Enterprise XI, uses Business Objects-supplied APIs.

---

## Task 11-3-3: Installing BusinessObjects Enterprise XI on Windows

You must log on to the Windows machine as a user included in the Administrator group.

To install BusinessObjects Enterprise XI from the CD:

1. Insert the BusinessObjects Enterprise XI CD into the server machine's CD-ROM drive.
2. Navigate to the CD-ROM's root directory and run `setup.exe`.

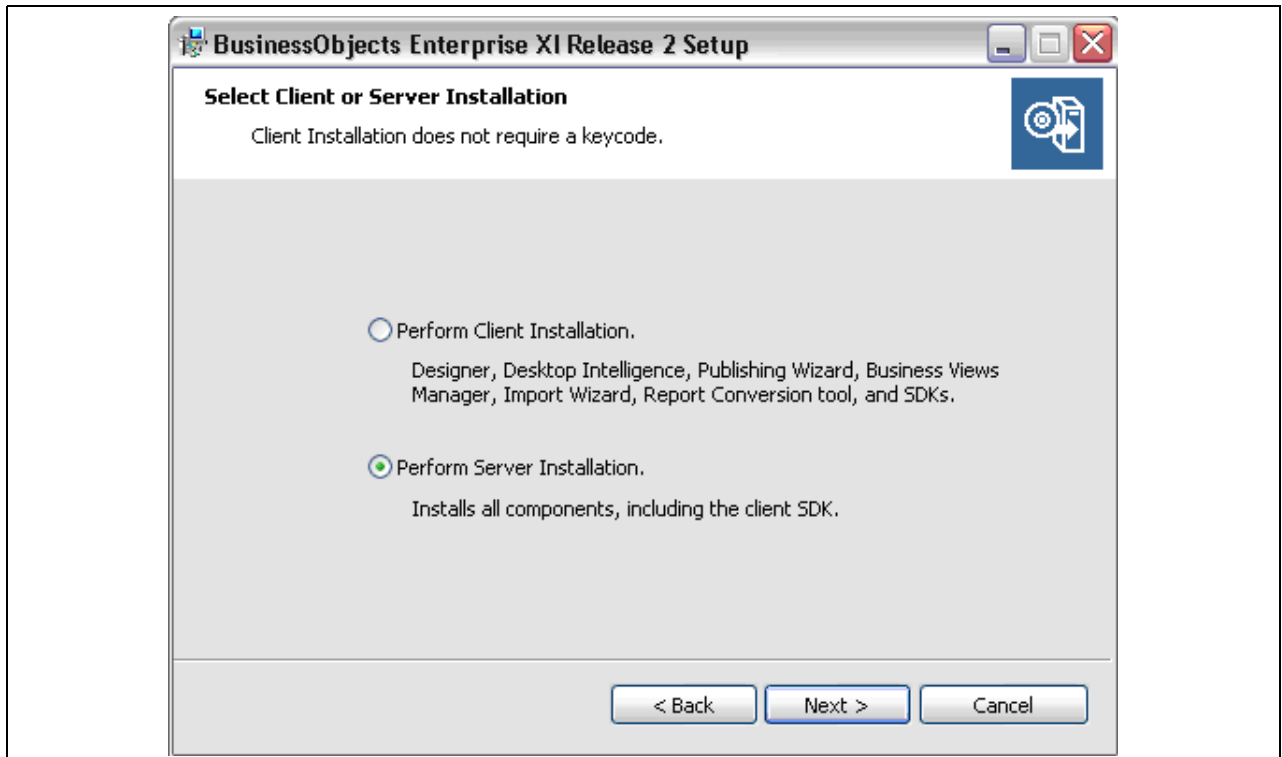
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**Note.** If you are installing from a network, you must run `setup.exe` from the network location.

---

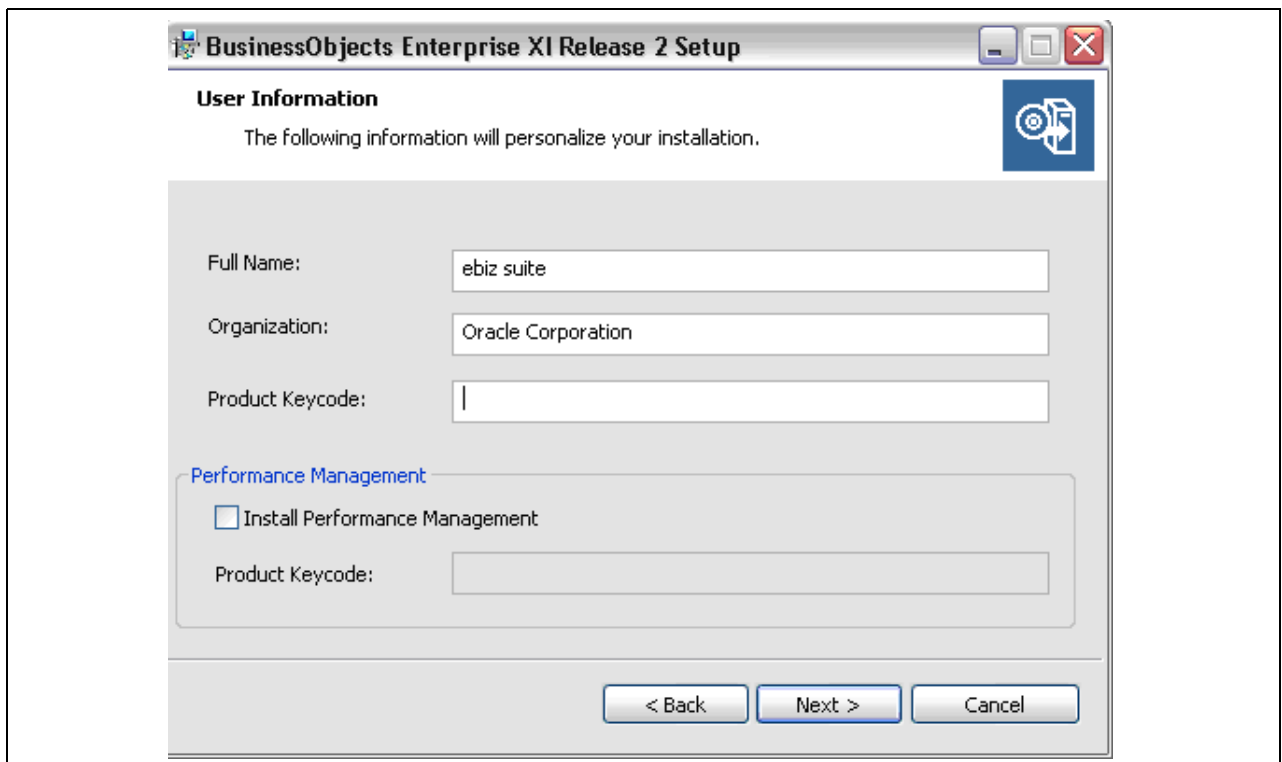
The install program will search for any previous version of BusinessObjects Enterprise XI and then present a Welcome message.

3. Click Next.  
A license dialog box appears.
4. Accept the license agreement.
5. Select Perform Server Installation.



Select Client or Server Installation window

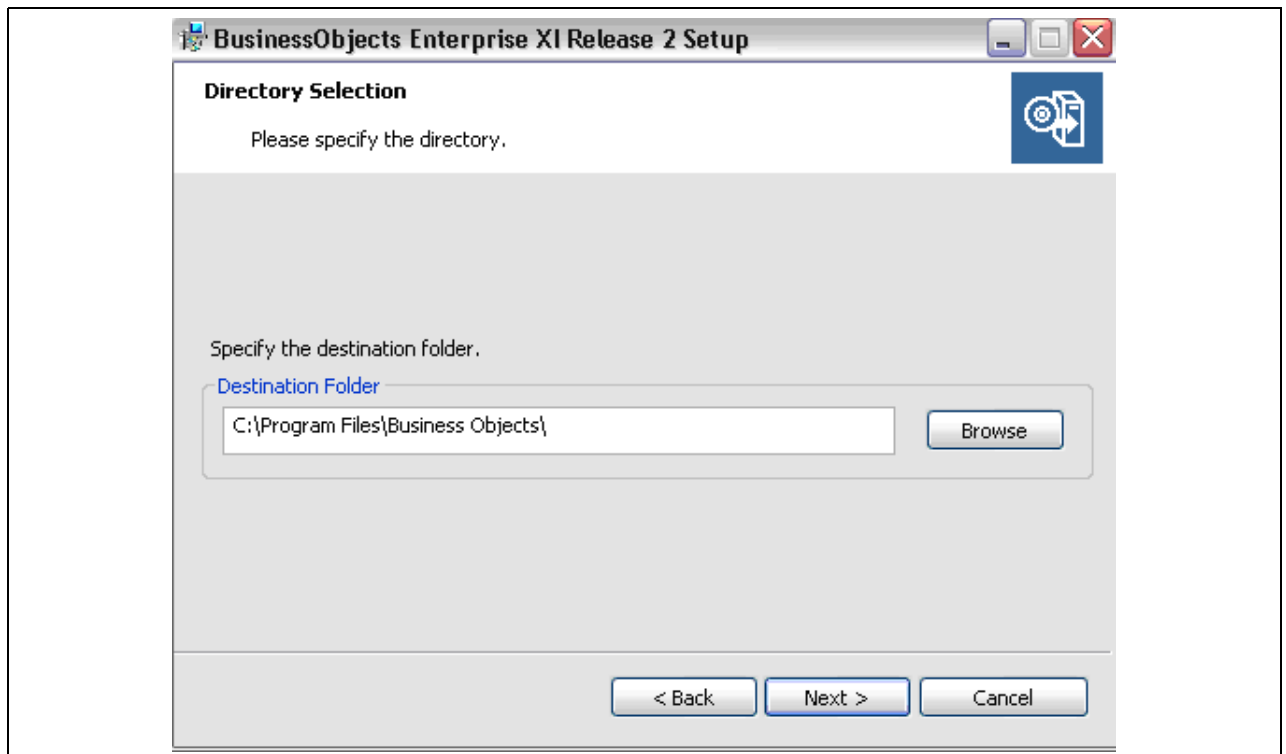
6. Enter the product key code.



User Information Window

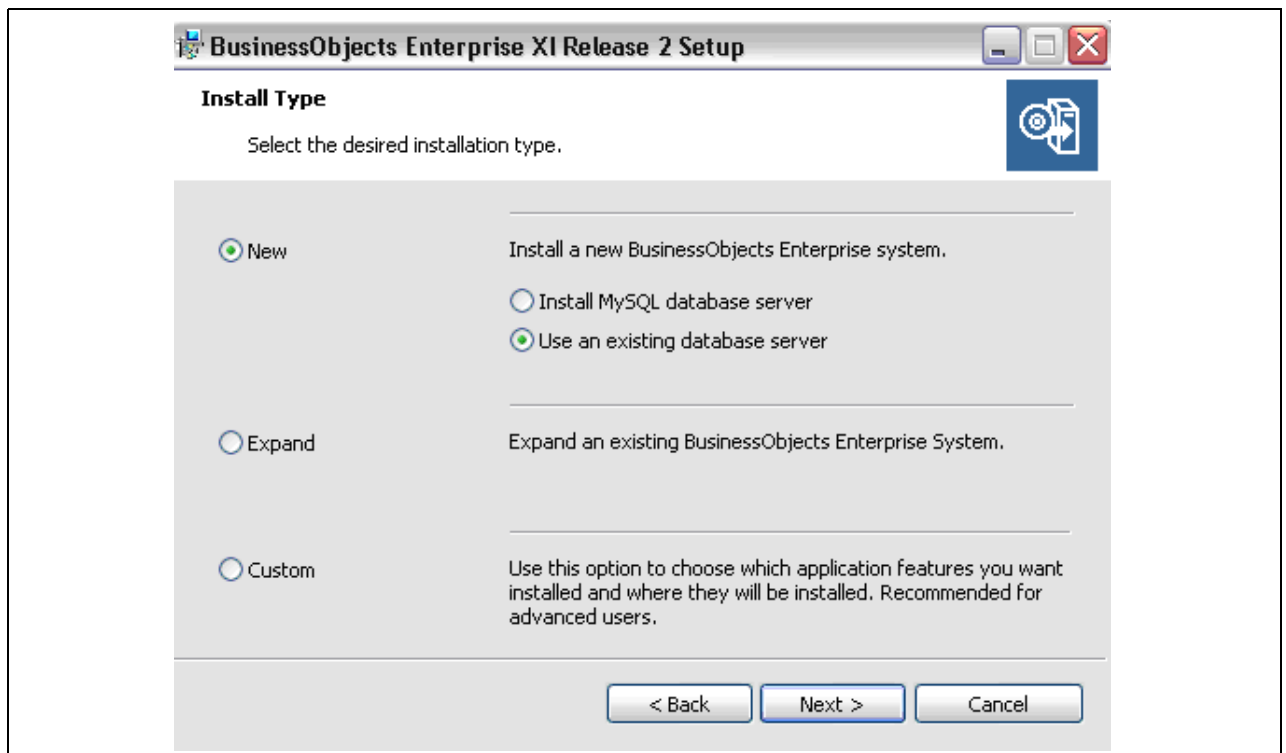
7. Accept the default location for the installation directory or use the Browse button to select another location.

**Note.** The folder that you enter here is referred to as the <BOE\_DIR> later in this document.



Directory Selection window

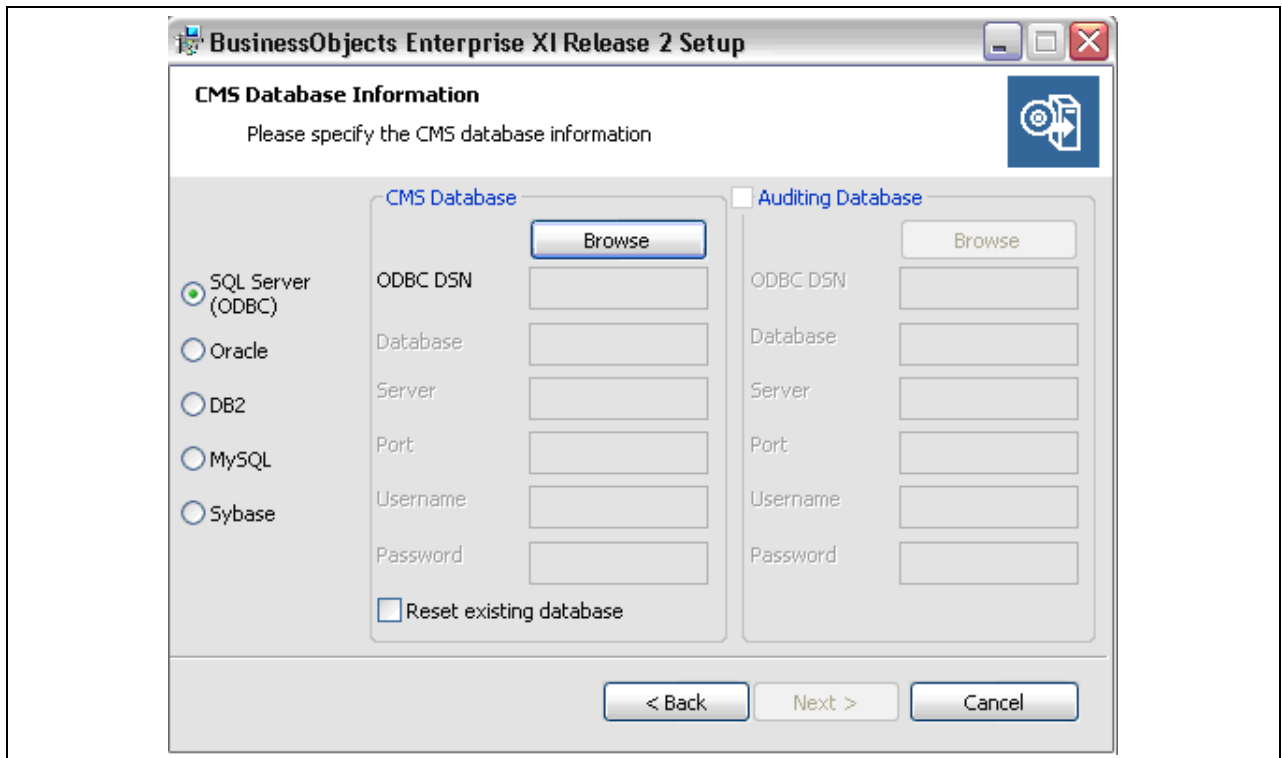
8. On the Install Type dialog, select *New* as the installation type and Select “Use an Existing Database server”.



Selecting the Install type window

9. If you choose a local SQL server database, as your database, you will be prompted for SQL Server Authentication information. Enter the SQL Server Login ID and password.

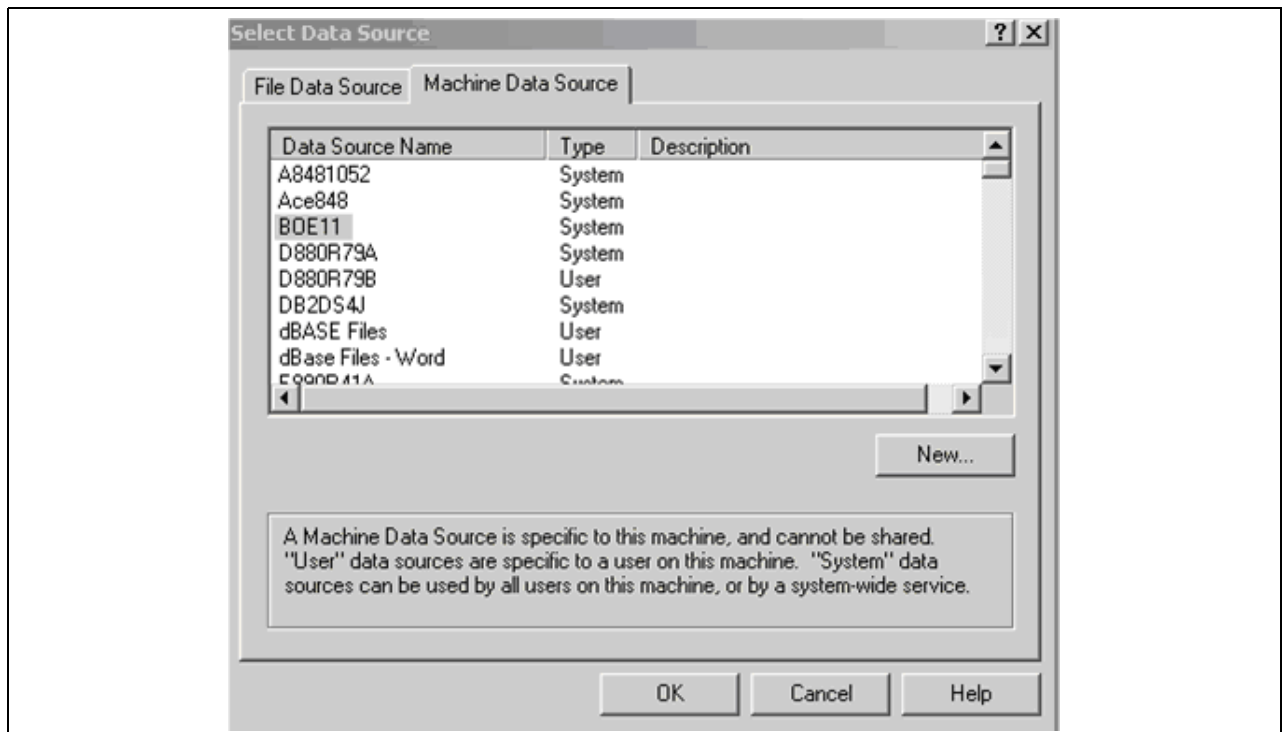
If you choose an RDBMS other than MS SQL Server, select the appropriate database type on the CMS Database Information dialog; enter the login details and Click Next.



The CMS Database Information window

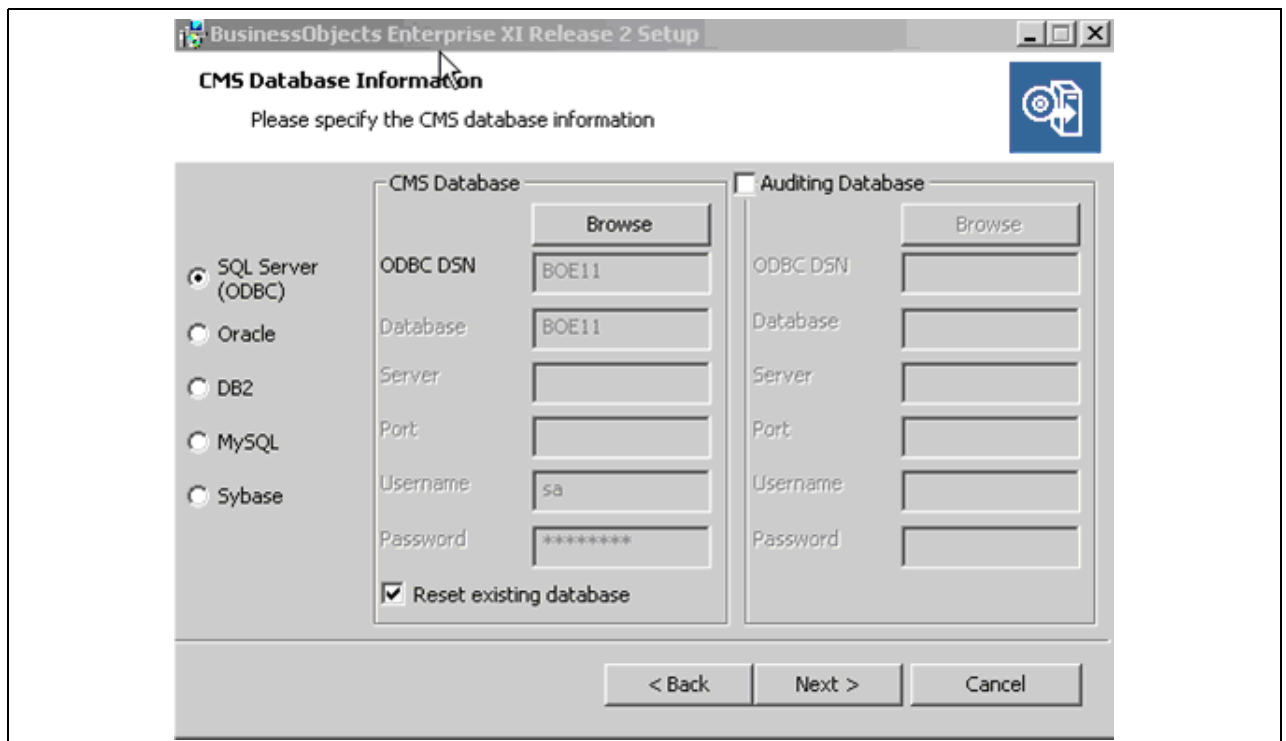
10. For MS SQL Server, click on Browse. On the Select Data Source dialog, go to Machine Data Source tab and select an existing data source, for example BOE11, or create new data source by clicking the New button. Press OK and fill the database login and password.





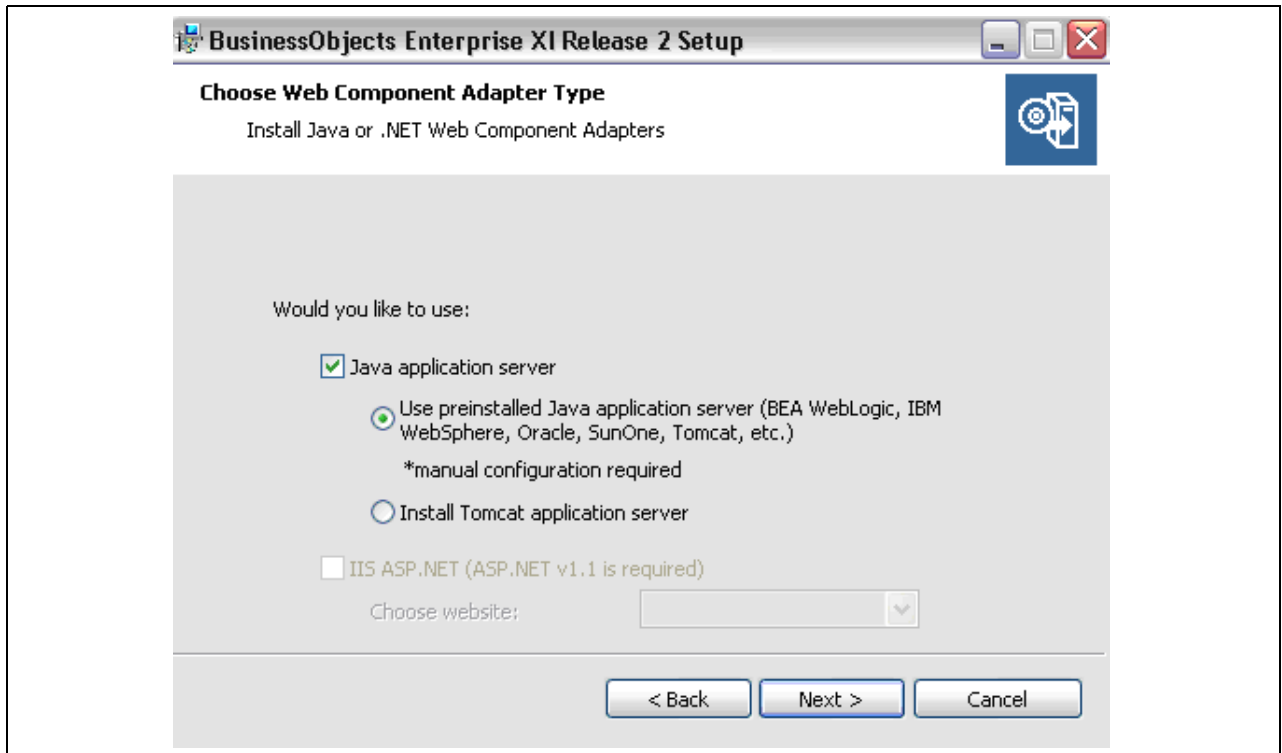
Selecting a Data Source window

11. Back on the CMS Database Information window, select “Reset existing database” and unselect “Auditing Database”.



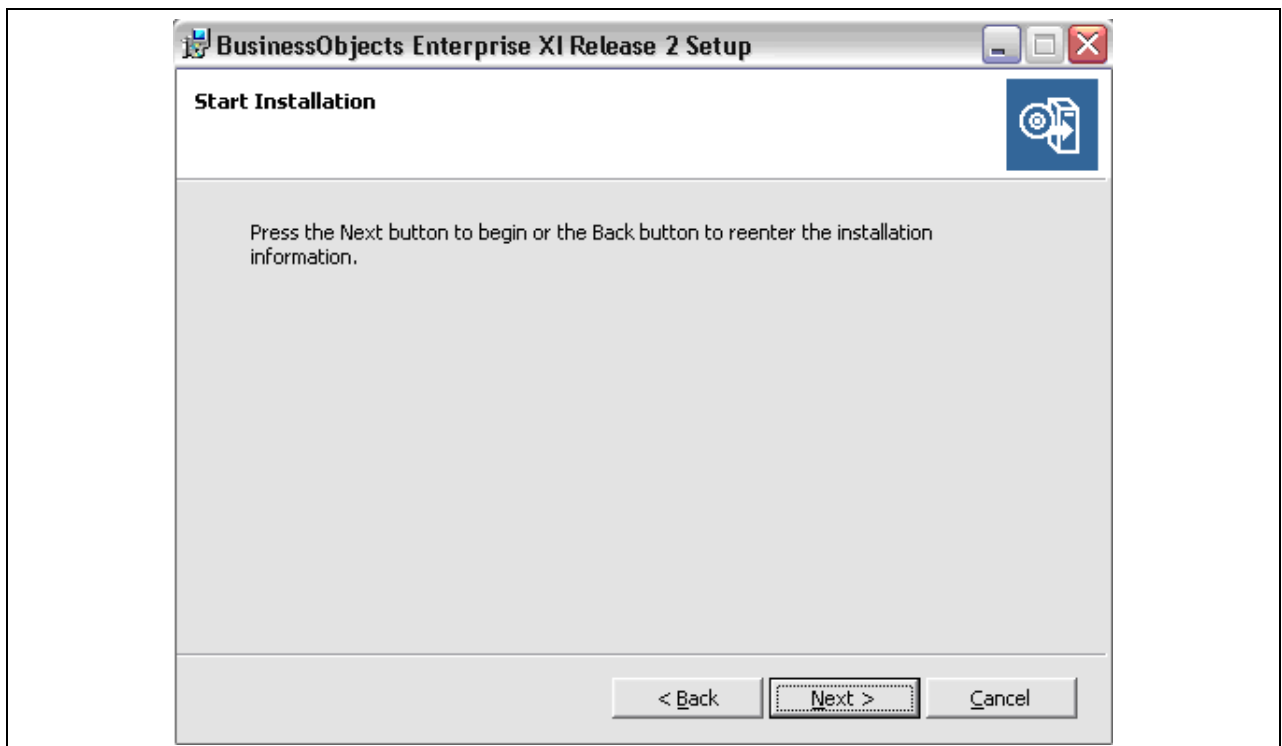
The CMS Database Information window

12. Select “Use preinstalled Java application server.”
13. Click Next on the Start Installation dialog box.



The Choose Web Component Adapter Type window

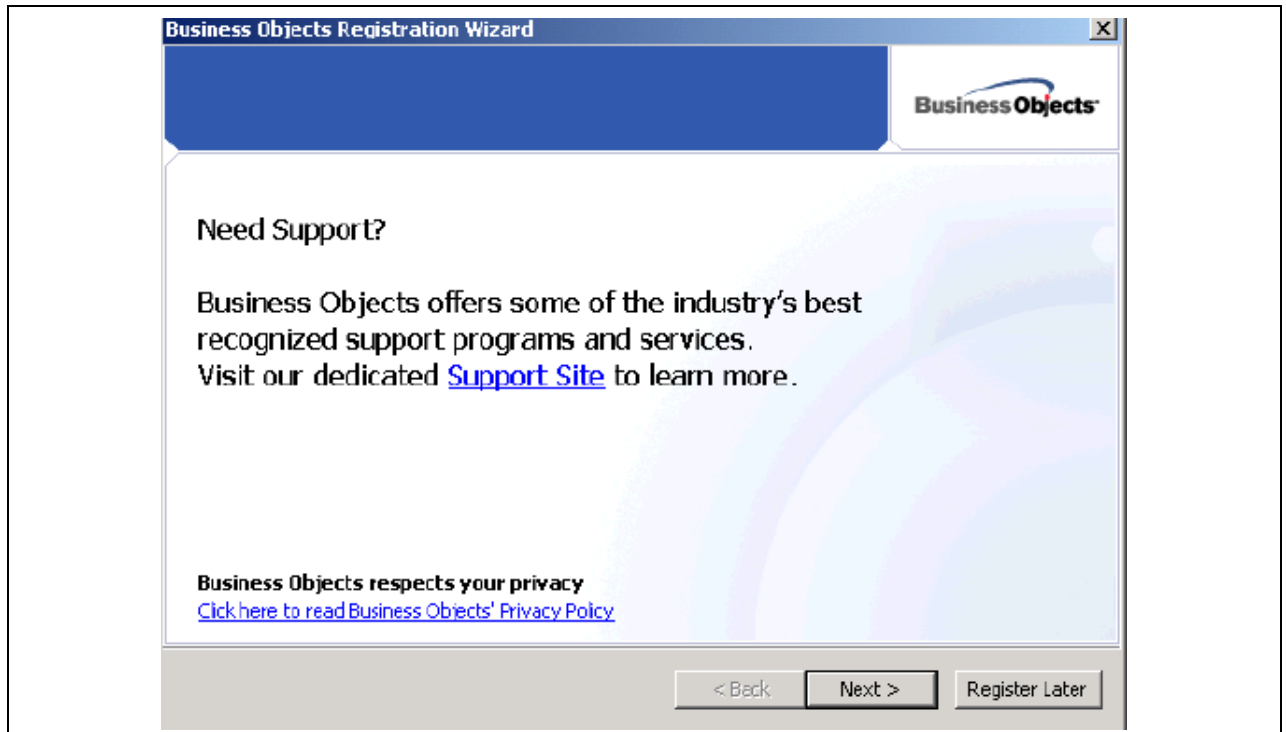
14. Click Next on the Start Installation dialog box.



The Start Installation window

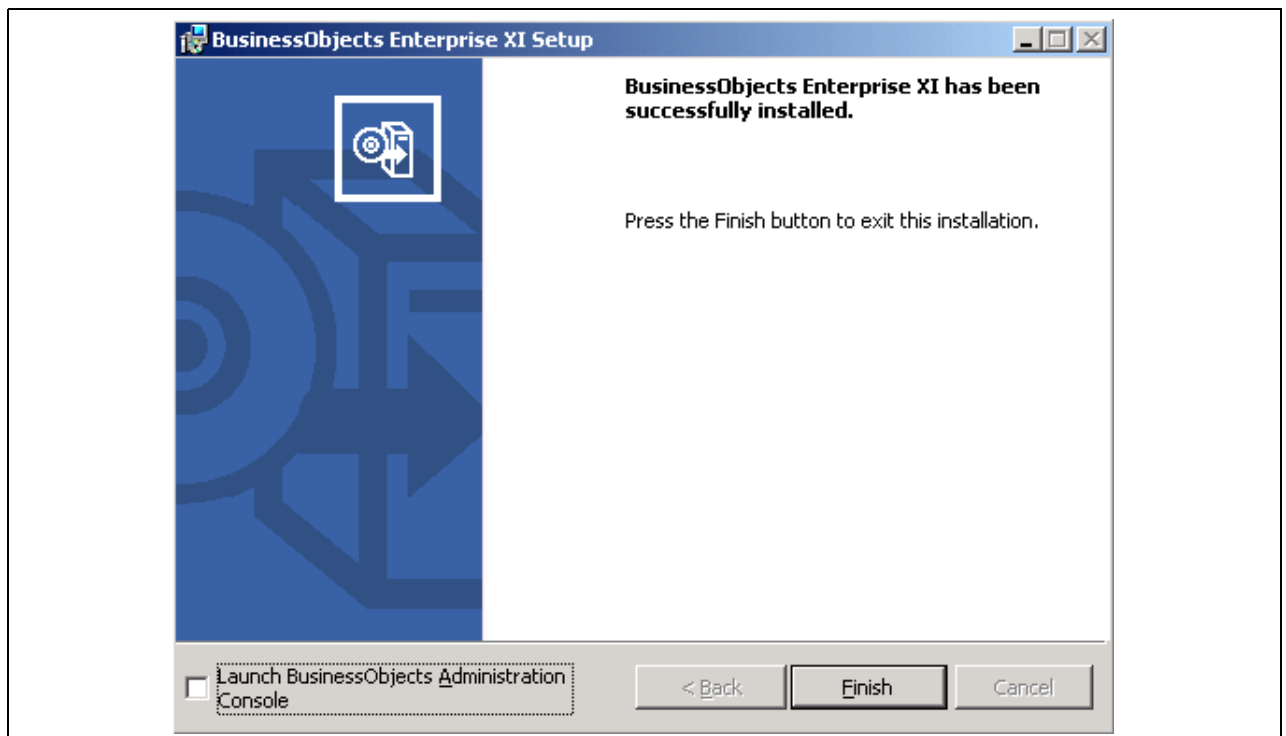
15. If you are installing BusinessObjects Enterprise XI from CDs, you will be prompted to insert additional CDs to proceed.

If you are installing from a network location, you will not receive these prompts.  
The installation proceeds for several minutes.



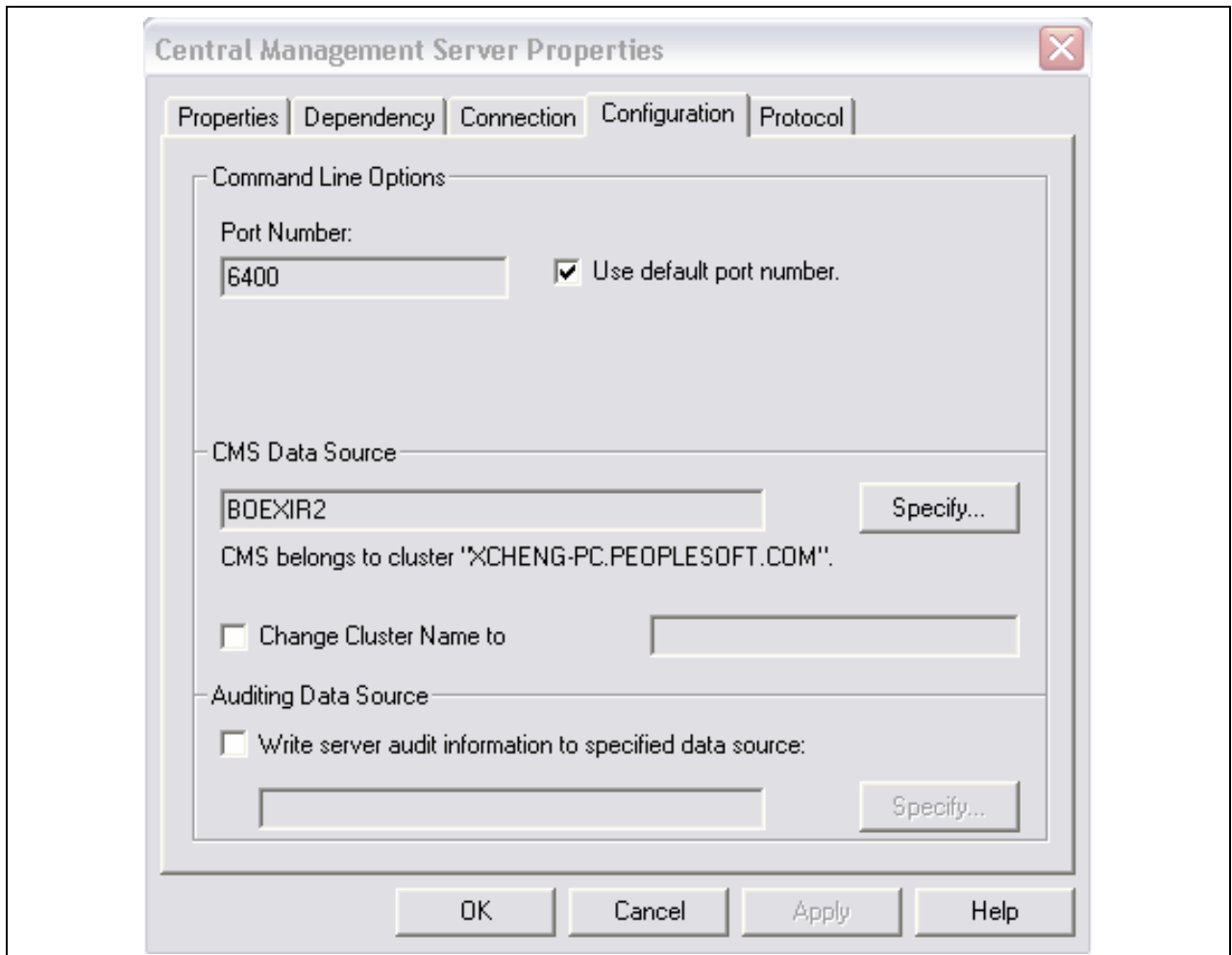
Installation window

16. When the dialog box appears saying the installation is complete, deselect the check box Launch BusinessObjects Administration Console and click Finish.



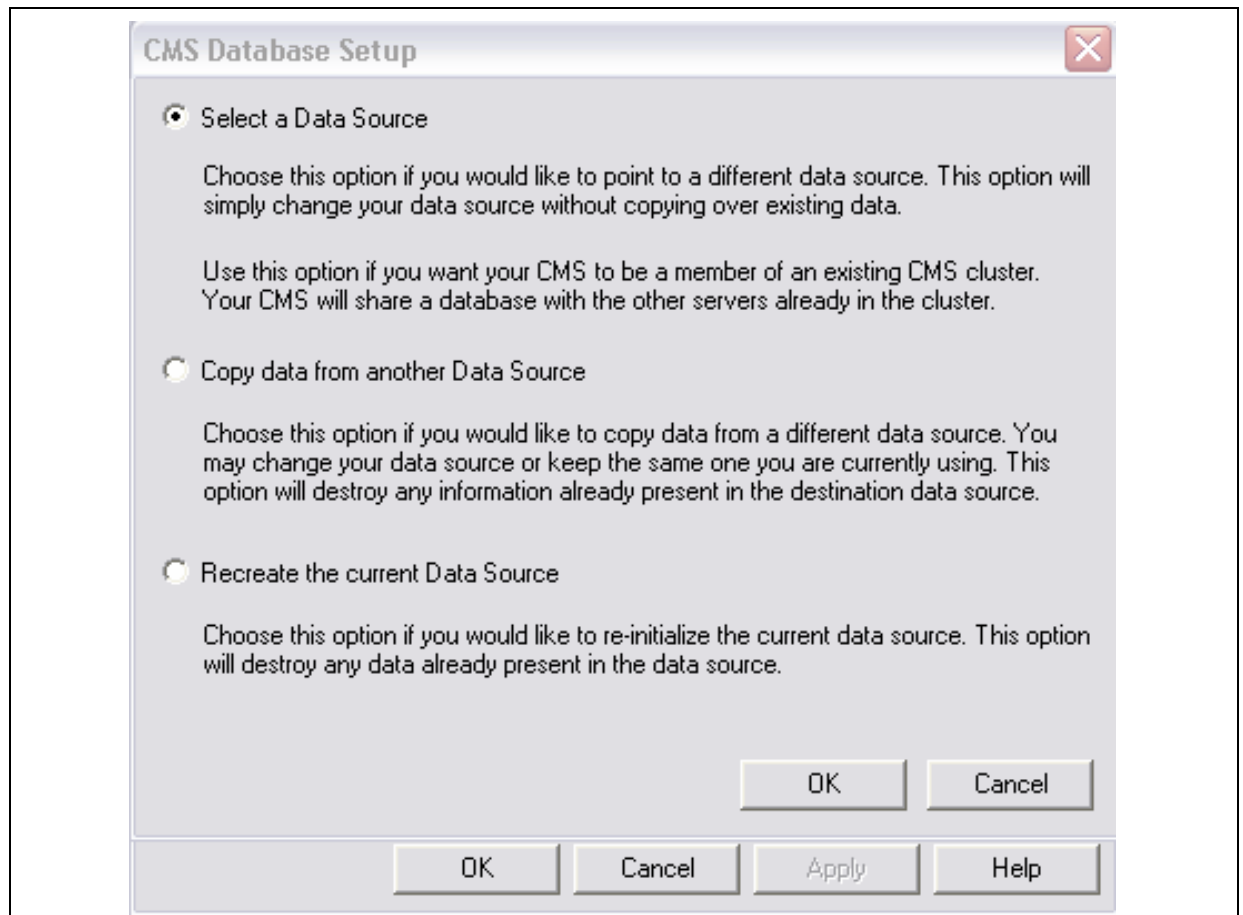
Installation complete window

17. Select Start, Programs, Business Objects XI, Business Objects Enterprise, Central Configuration Manager.
18. If a database other than MS SQL Server is used perform the next three steps . (If another db than MS SQL Server is used only) Stop the Central management Server and right click to choose properties. Select the Configuration tab, You should get a dialog like below.



Central Management Server Properties Window

- a. Click the “Specify...” button, select a Data Source, then click OK



CMS Database Setup Window

- b. Choose the database connection type and click OK button



Select Database Driver

- c. Retype Database installation information like you did during the original install. You only have to define this once after install



DB2 Database

19. When you are done, highlight Central Management Server and ensure that it is started.

If it is not started, start the server by clicking the start arrow.

After each machine reboot, you may have to start the Central Management Server in the Central Configuration Manager manually.

20. Set the following environment system variables after the BusinessObjects Enterprise XI installation is complete:

---

**Important!** If these system variables are not set, the deployment of the BusinessObjects Enterprise web applications will fail as they are dependent on these environment settings.

---



---

**Note.** <BOE\_DIR> refers to the folder in which you installed BusinessObjects Enterprise XI (for example, C:\Program Files\BusinessObjects\). Substitute your path in the following.

---

- The PATH environment system variable should include:  
     <BOE\_DIR>\BusinessObjects Enterprise 11.5\win32\_x86
- The CLASSPATH environment system variable should include:  
     <BOE\_DIR>\BusinessObjects Enterprise 11.5\java\applications\cewcanative.jar

21. Reboot your machine.

## Task 11-3-4: Installing BusinessObjects Integration Kit for PeopleSoft on Windows

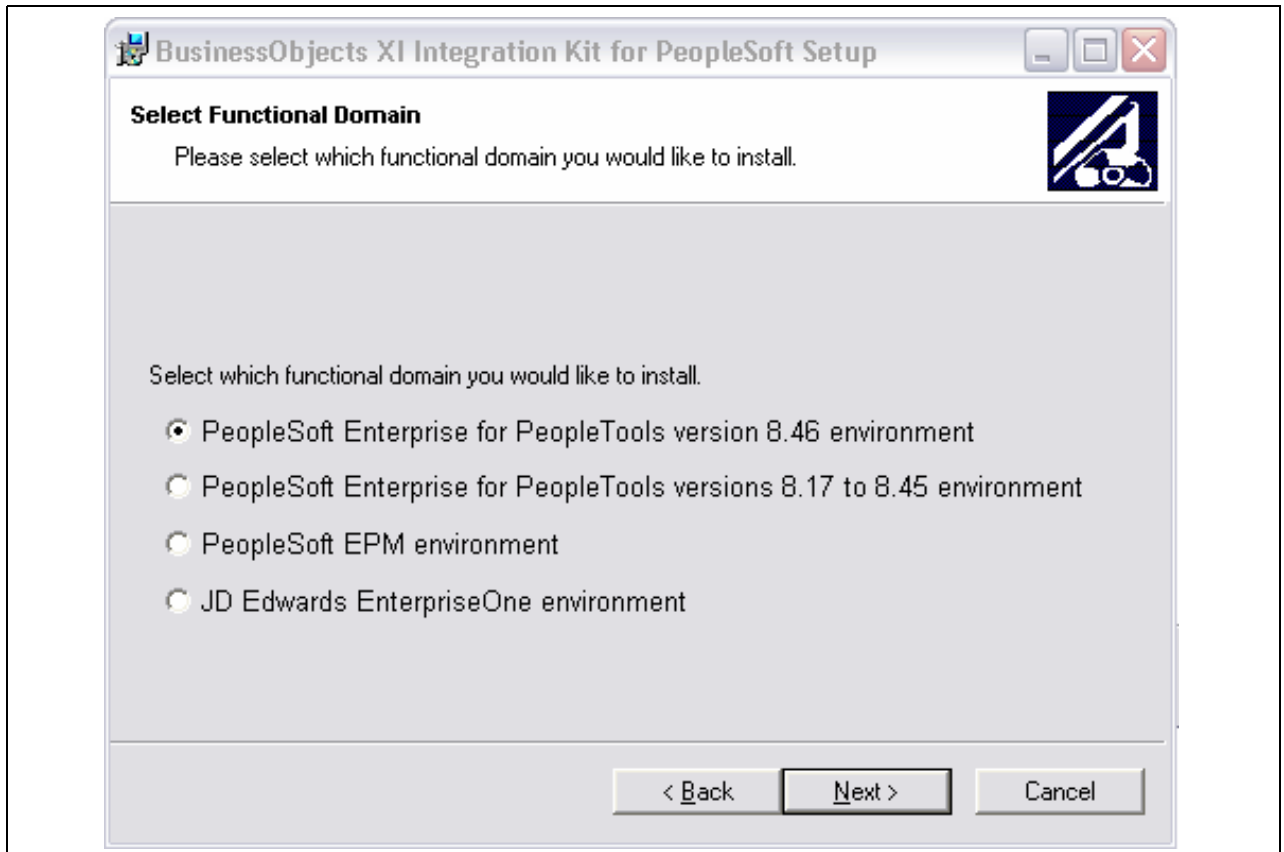
On the machine where Business Objects Enterprise installed,

1. Insert the CD and run setup.exe.
2. Choose the setup language.
3. Read the recommendation message and click next



BusinessObjects XI Integration Kit for PeopleSoft Setup Welcome Window

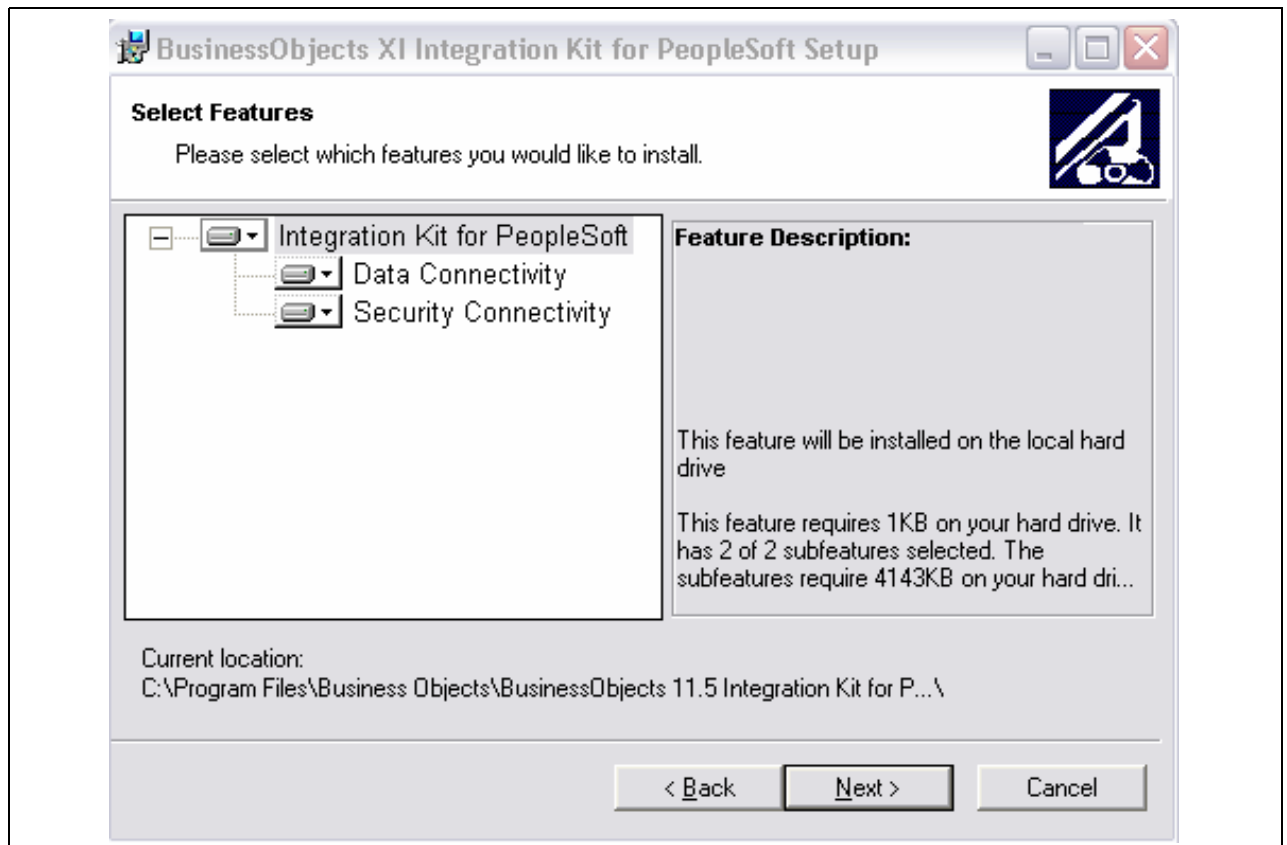
4. Select the first option "PeopleSoft Enterprise for PeopleTools version 8.46 environment" and click Next



Select Functional Domain Window

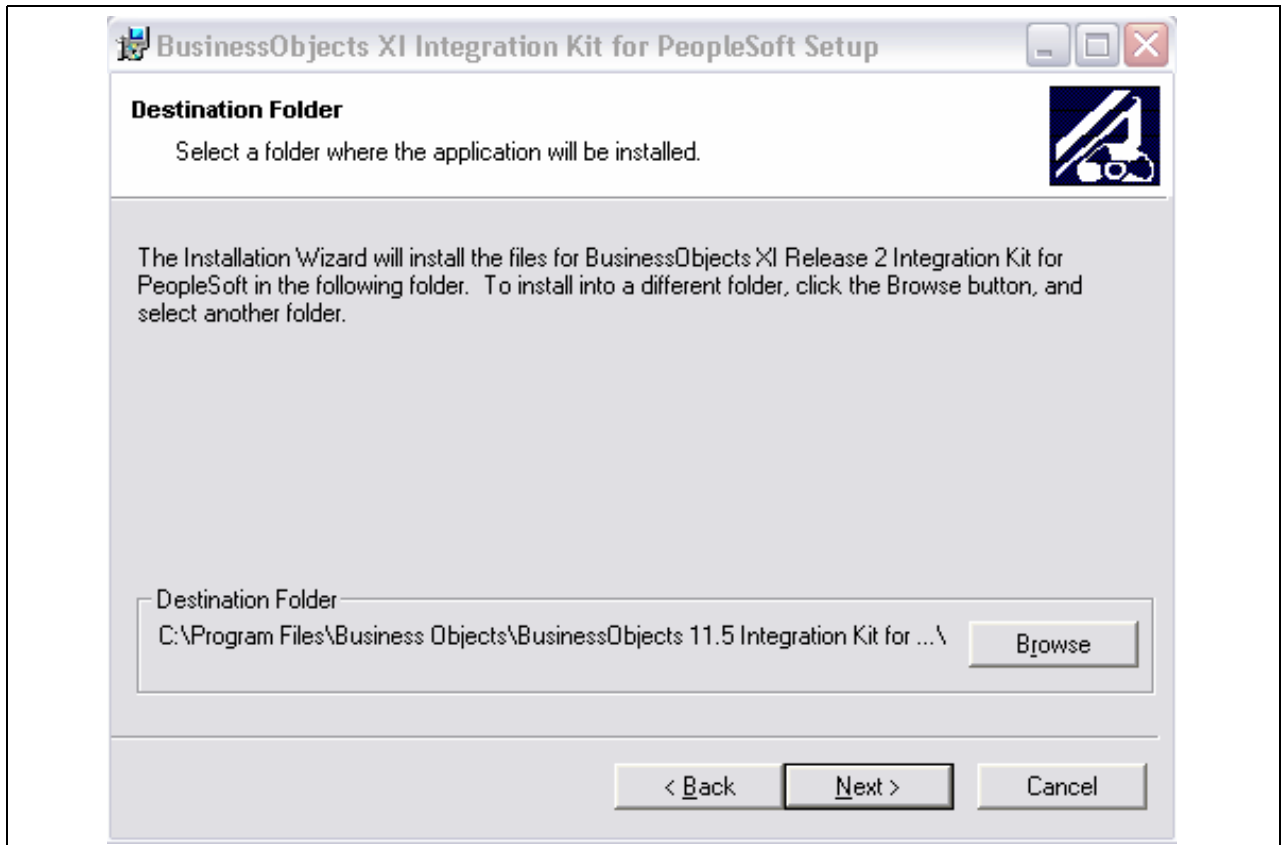
5. Accept license agreement and click next
6. Click Next to install Integration Kit that includes Data Connectivity and Security Connectivity.





Select Features Window

7. Browse the location you prefer to install. Click Next twice until you see the finish screen.



Destination Folder

8. Click Finish button.

## Task 11-3-5: Installing BusinessObjects Enterprise XI Integration on Windows

This task installs the four web application files:

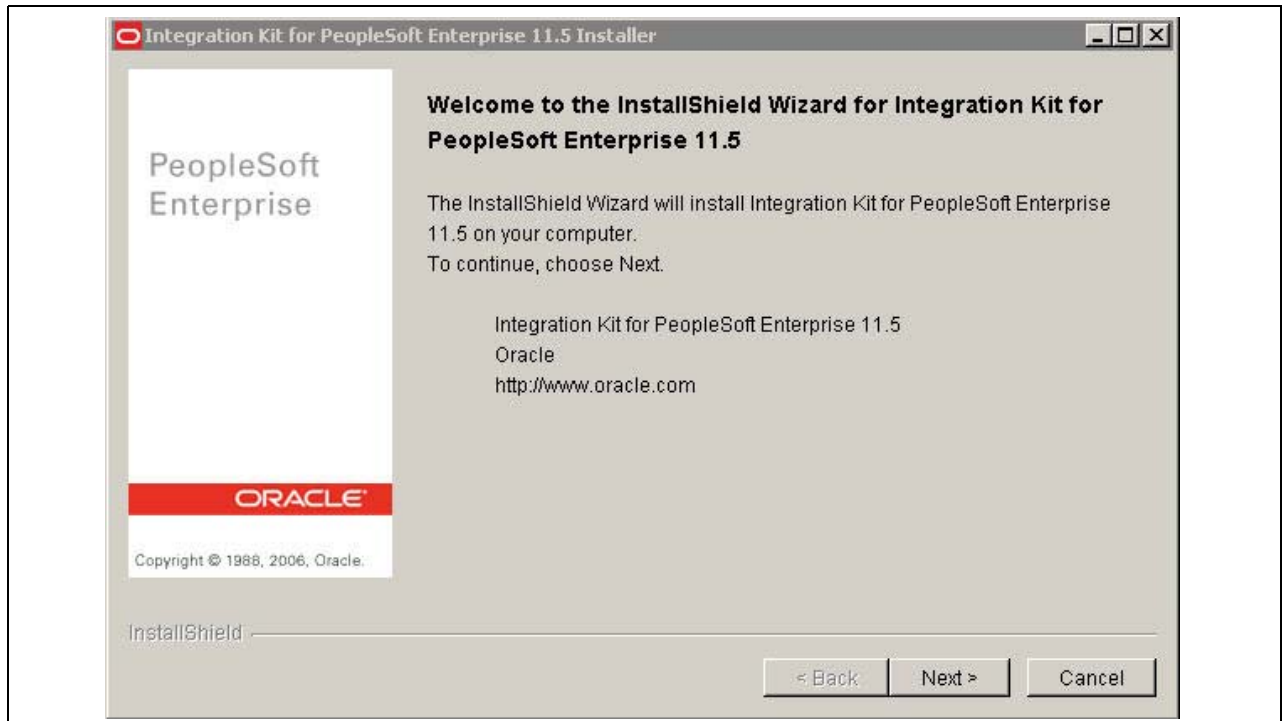
- psadmin.war
- psdesktop.war
- psadhoc.war
- pswebcompadapter.war

This installation takes place on the machine on which you have installed BusinessObjects Enterprise XI.

To install PeopleSoft BusinessObjects Enterprise XI Integration:

1. Log on to your machine as an administrator.
2. Navigate to <PS\_HOME>\setup\PsmPcrystalInstall and double-click setup.exe.

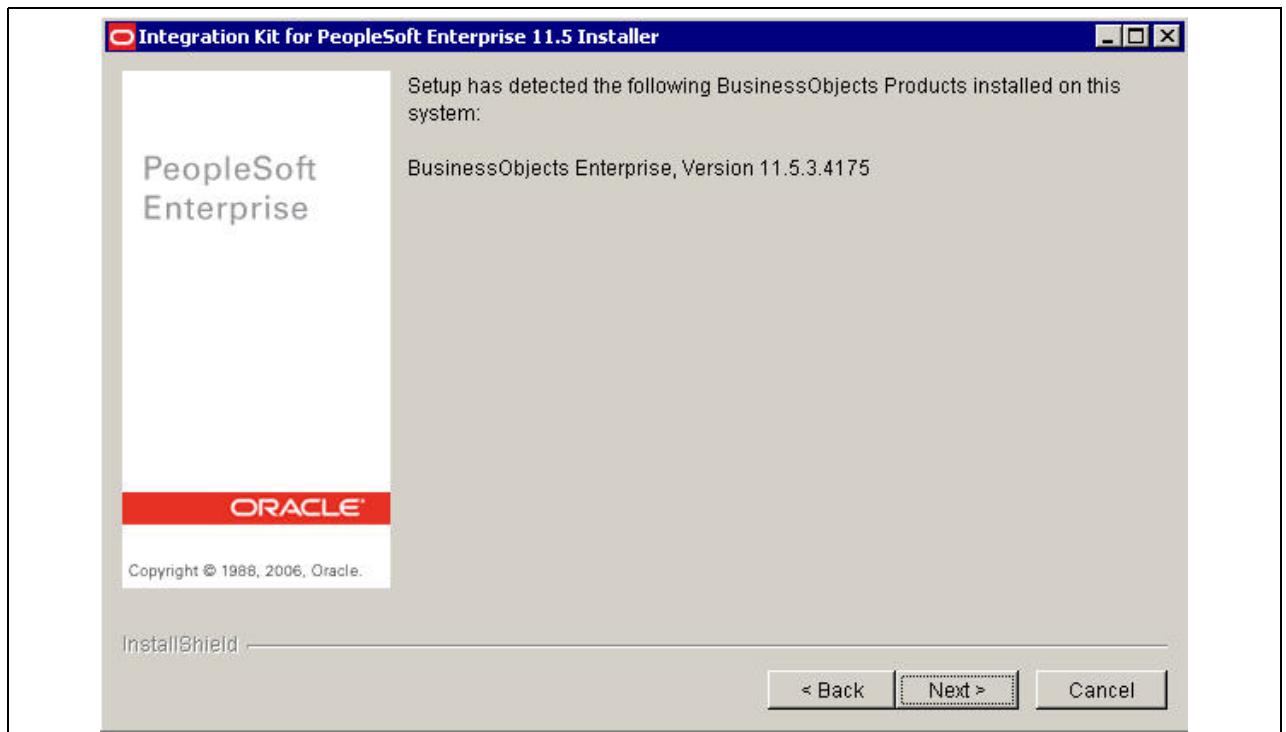
A welcome window appears:



BusinessObjects Enterprise XI for PeopleSoft Enterprise Integration Installer window

3. Click Next.

If the installer finds Crystal Report or BusinessObjects Enterprise XI installed on your system, it displays the name and version number:



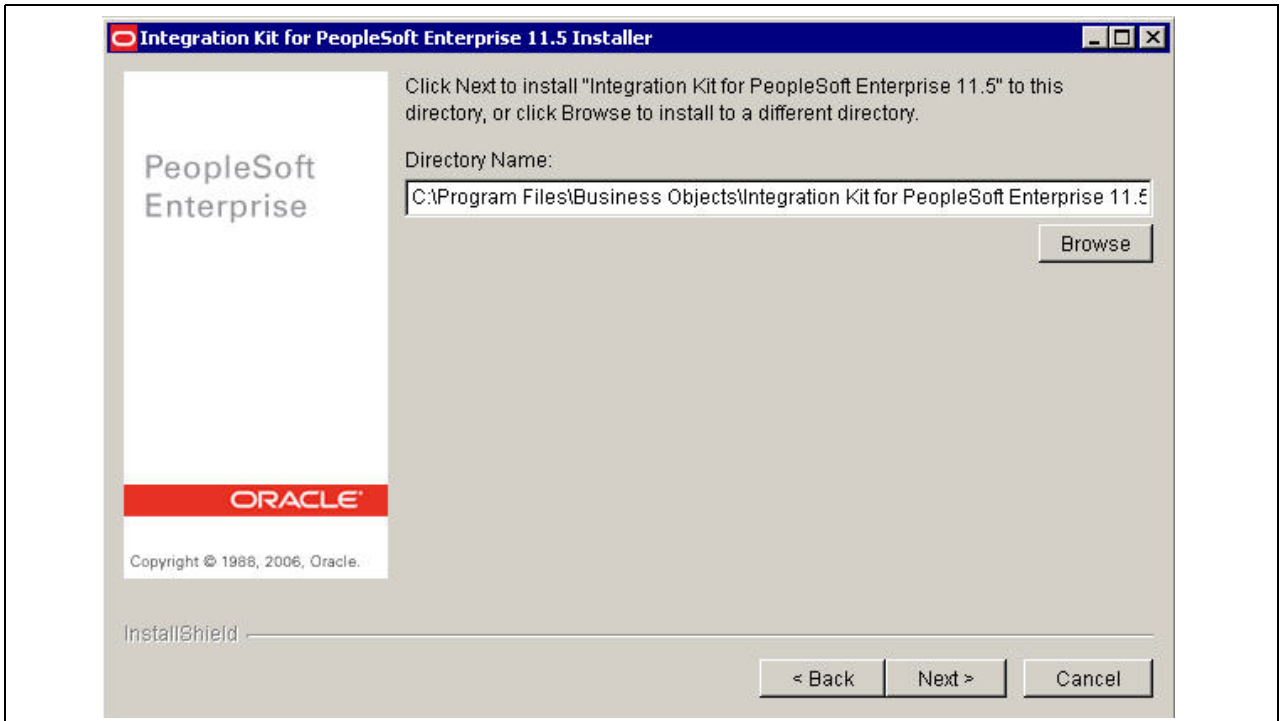
Confirming BusinessObjects Products

---

**Note.** If the installer cannot find Crystal Reports or BusinessObjects Enterprise XI on your system, it displays an error message. You must exit and install one of these products to continue.

---

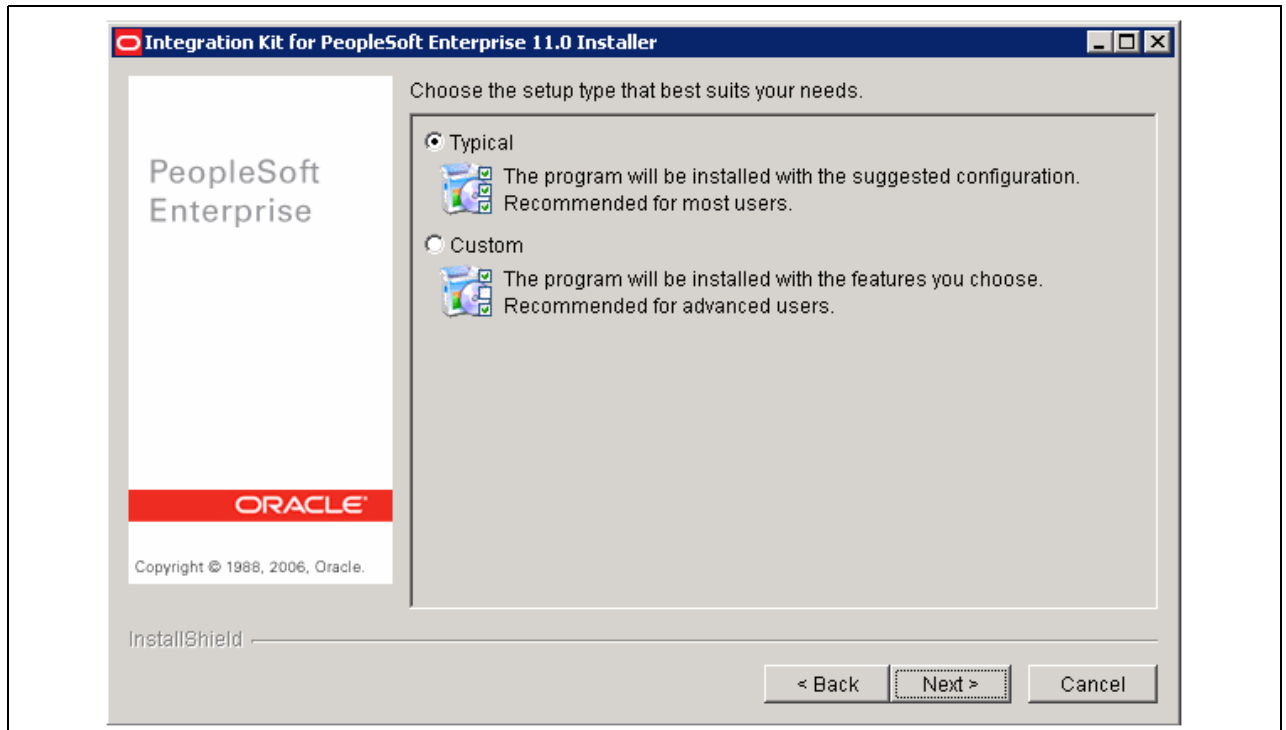
4. Accept the default installation directory on the next window, or click Browse to find another installation directory:



Selecting installation directory for BusinessObjects Enterprise XI Integration

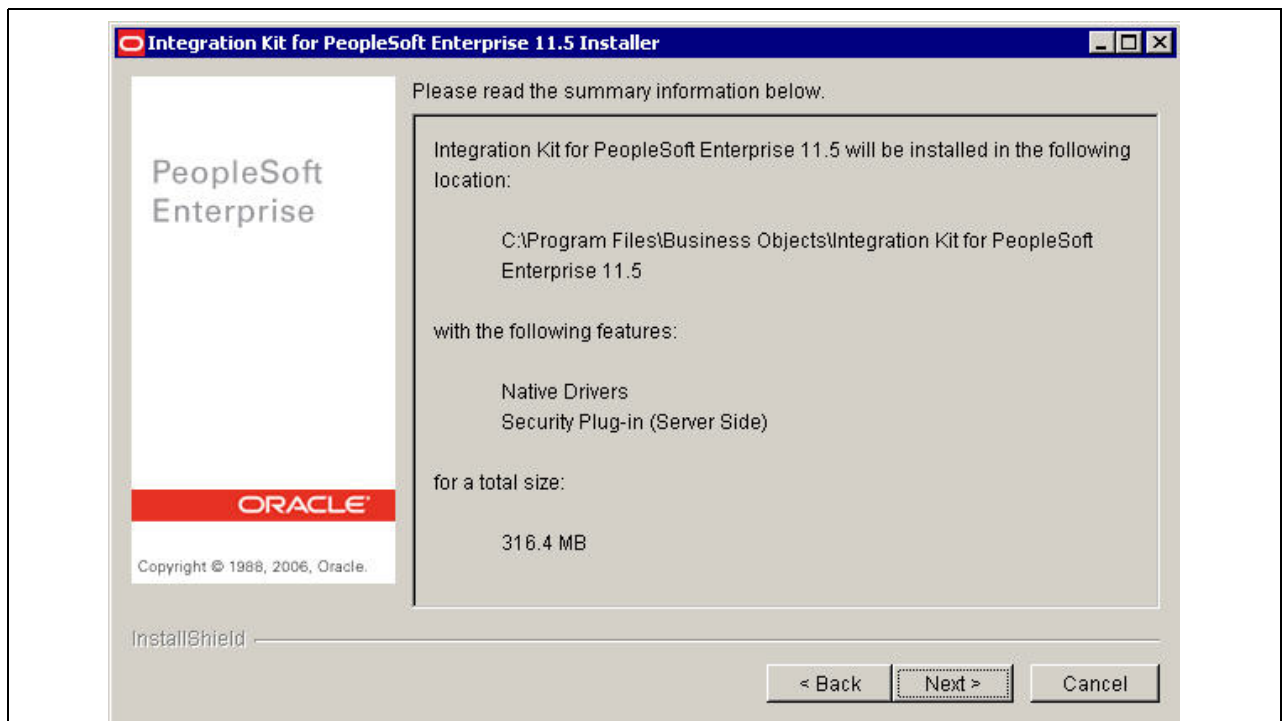
Click Next to continue.

5. Select Typical for the setup type, and click Next to continue:



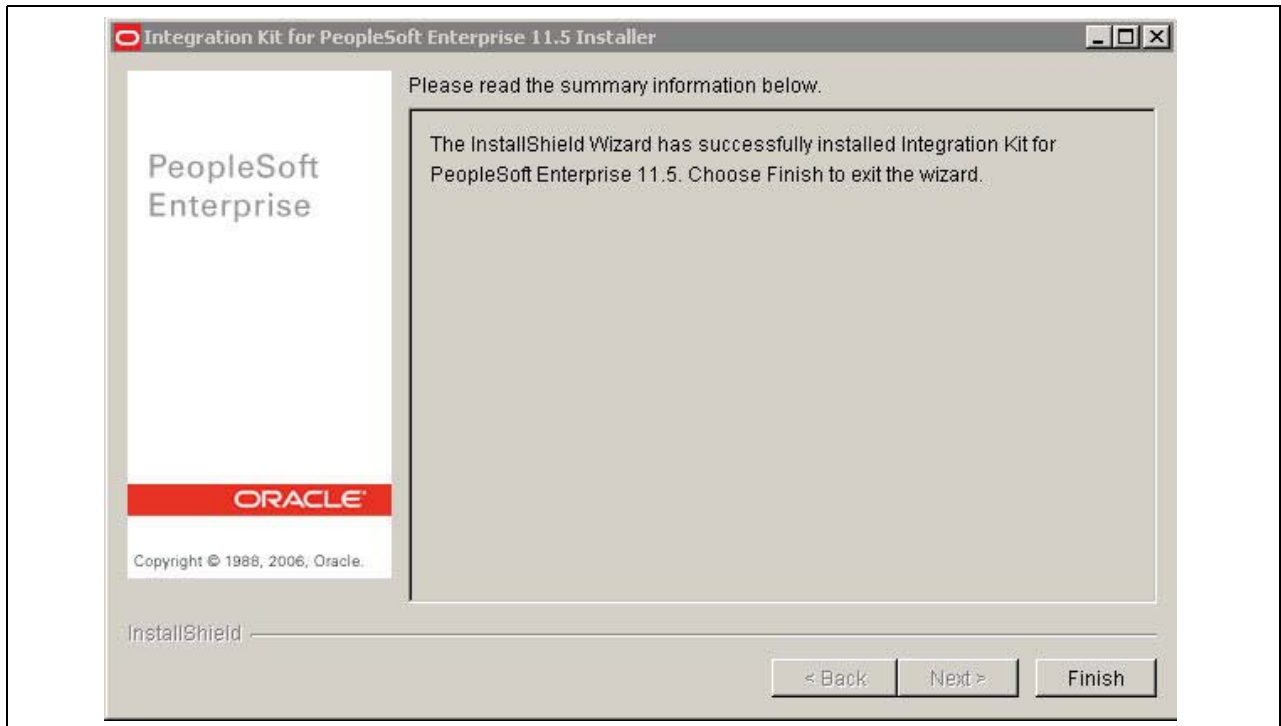
Selecting setup type on the BusinessObjects Enterprise XI for PeopleSoft Enterprise Integration Installer

6. Confirm that the installation summary is correct, and click Next to continue:



Summary information on the BusinessObjects Enterprise XI for PeopleSoft Enterprise Integration Installer

7. Click Next.  
An indicator shows the progress of your installation.
8. Click Finish to complete the installation:



Completion message on the BusinessObjects Enterprise XI for PeopleSoft Enterprise Integration Installer window

## Task 11-3-6: Installing TrueType Fonts on Windows

To run certain reports you may need special fonts that do not normally come with BusinessObjects Enterprise XI. PeopleSoft packages and installs two such TrueType fonts in its directory structure: • MICR font for check printing - MICR\_\_.ttf • 3of9 barcode font - B39R00.ttf You can copy and install them on your machine where BusinessObjects Enterprise XI is installed to make them available to that application. To install TrueType fonts on Windows:

1. Choose Start —> Settings —> Control Panel.
2. Double-click the Fonts folder.
3. Choose File —> Install New Font.
4. Locate the fonts you want to install:
  - In the Drives list, select the drive that contains the fonts you want to install.
  - In the Folders list, select the folder that contains the fonts you want to install. The fonts in the folder appear under List of Fonts.
5. Select the fonts to install. To select more than one font, hold down the CTRL key and click each font.
6. To copy the fonts to the Fonts folder, make sure the Copy fonts to Fonts folder check box is selected
7. Click OK to install the fonts.

## Task 11-3-7: Installing Special Fonts on Windows

To install special fonts on Windows:

1. Copy the <PS\_HOME>\FONTS\Truetype folder to your BOE machine (the \winnt\fonts folder is a good place to copy it to).

2. Choose Start —> Settings —> Control Panel.
3. Double-click the Fonts folder.
4. Choose File —> Install New Font.
5. Locate the fonts you want to install.
  - In the Drives list, select the drive that contains the fonts you want to install.
  - In the Folders list, select the folder that contains the fonts you want to install. The fonts in the folder appear under List of Fonts.
6. Select the fonts to install. To select more than one font, hold down the CTRL key and click each font.
7. To copy the fonts to the Fonts folder, make sure the Copy fonts to Fonts folder check box is selected.
8. Click OK to install the fonts.

### Task 11-3-8: Installing Patches Required at Installation Time

There may be patches for BusinessObjects Enterprise XI as well as the PeopleSoft Integration for BusinessObjects Enterprise XI that must be installed at installation.

Log onto Customer Connection to check using the Required for Install or Upgrade search page. You can search using the following criteria:

|                     |                                               |
|---------------------|-----------------------------------------------|
| <b>Product Line</b> | PeopleTools                                   |
| <b>Product</b>      | PeopleTools                                   |
| <b>Release</b>      | the release of PeopleTools that you are using |

### Task 11-3-9: Creating a Web Server for BusinessObjects Enterprise XI on Windows

This section discusses:

- Creating an Oracle Application Server (OAS) Server on Windows
- Deploying the BusinessObjects Enterprise XI Launchpad Applications for OAS on Windows
- Creating a WebLogic Server on Windows
- Deploying the BusinessObjects Enterprise XI Release 2 Launchpad Applications for WebLogic on Windows
- Creating a WebSphere Server on Windows
- Deploying the BusinessObjects Enterprise XI Launchpad Applications for WebSphere on Windows

#### Creating an Oracle Application Server (OAS) Server on Windows

Before beginning this procedure you must have installed OAS on the server where BusinessObjects Enterprise XI is installed.

1. Change the deployment values for the Java WCA, if you are using Oracle 10g server.
  - a. Stop java application server.

---

**Note.** To stop OAS, use the command `<OAS_HOME>\opmn\bin\opmnctl stopall`.

---

- b. Extract web.xml from pswebcompadapter.war using a tool such as WinZip.

The default location for pswebcompadapter.war is C:\Program Files\Business Objects\BusinessObjects Enterprise 11.5\java\applications.

- c. Open web.xml with a text editor.
- d. Change “false” to “true” in the following entry:

```
<!-- if you are using oracle10g, turn this flag to true -->
<context-param>
 <param-name>was.oracle</param-name>
 <param-value>false</param-value>
 <description>Reserved.</description>
</context-param>
```

- e. Save web.xml and reinsert into WEB-INF in pswebcompadapter.war.

---

**Note.** Tip: To insert web.xml to WEB-INF using WinZip. Open WinZip. From the Option menu, select Configuration. In the View tab of the Configuration dialog box, ensure that the “Allow all upper case file names” check box is selected. Return to your file directory, right-click the WEB-INF directory that contains your edited web.xml file and select Add to Zip File. Adding the file in this way ensures that it is placed in the correct directory inside the archive.

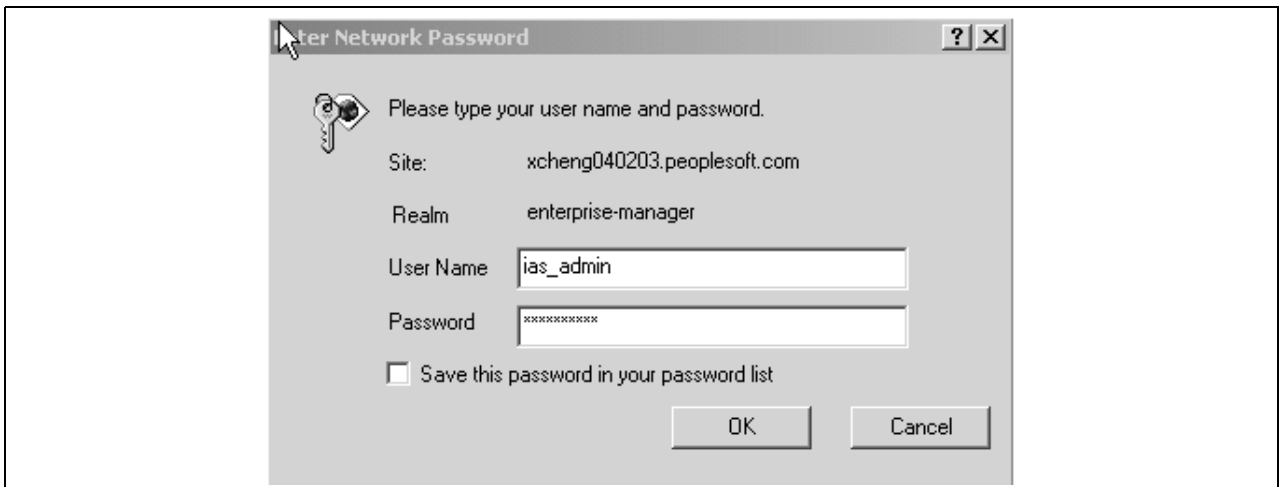
---

2. Open a browser window and enter the following URL to verify that the OAS server is running correctly:

http://<machine\_name>:<port>

where <machine name> is the name of the machine on which OAS is installed and <port> is the OAS port number (1810 is the default).

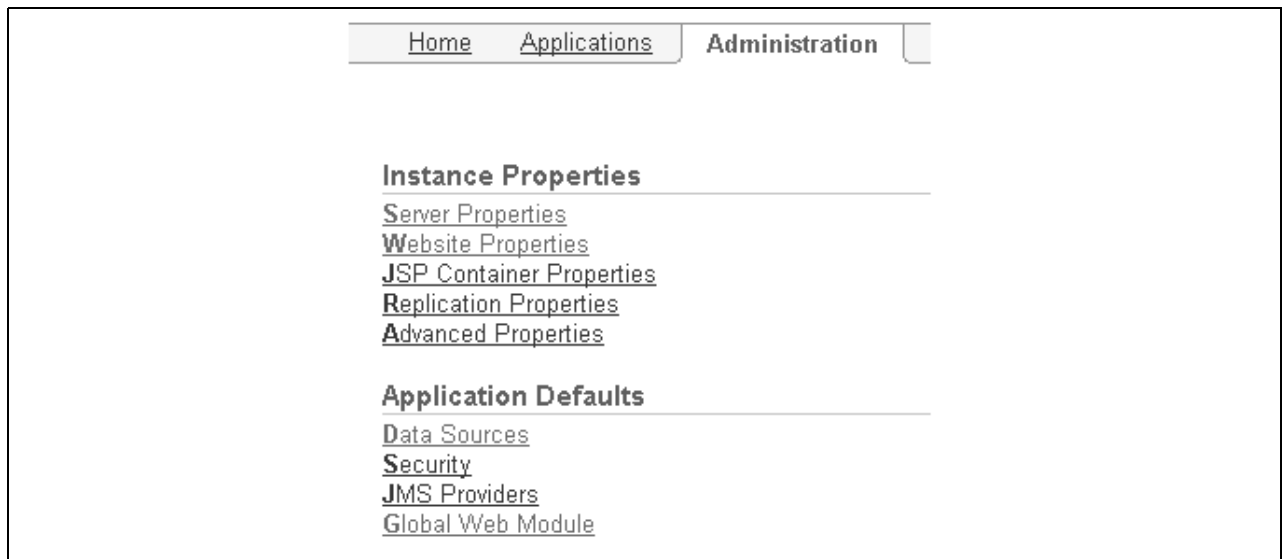
Enter the administrator user name (ias\_admin is the default) and the password that was set during the install.



OAS login dialog box

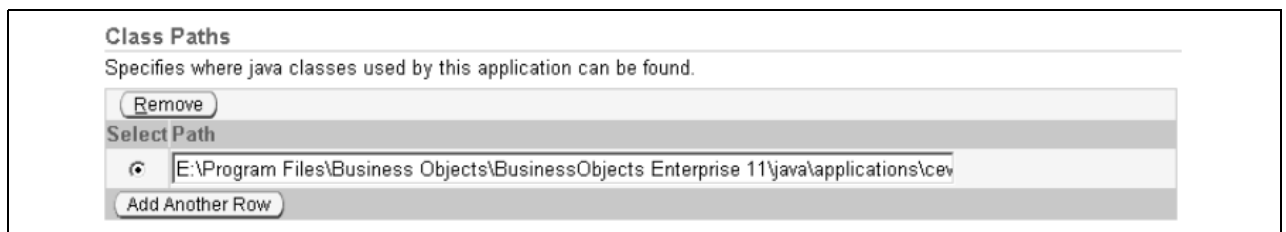
3. Click on the Start button to launch the server “home”.
4. Click OK after you receive a message that server has been started.
5. Select the Administration tab.





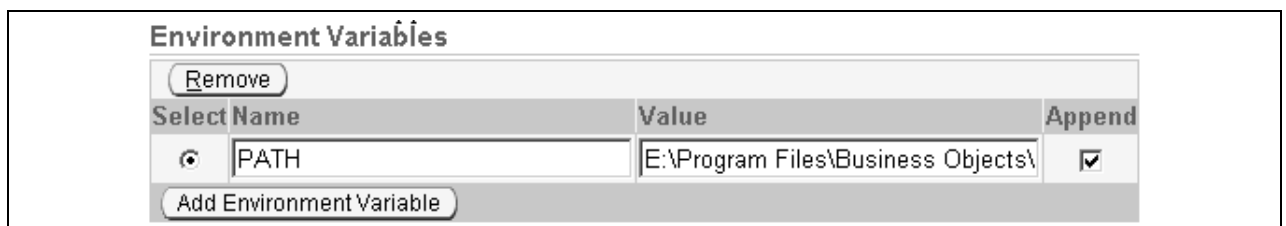
Administration tab

## 6. Configure the class path:



Class Paths page

- a. Click Global Web Module.
  - b. Click the General link under Properties.
  - c. Click Add Another Row in the Class Paths section.
  - d. Enter the full path, including the filename, for the `cewcanative.jar` file in the path field.  
For example, `<BOE_DIR>\BusinessObjects Enterprise 11.5\java\applications\cewcanative.jar`, where is the location where you installed BusinessObjects Enterprise XI.
7. Click the Apply button at the bottom of the page, and click OK.
  8. On the Administration tab, click the Server Properties link.
  9. In the Environment Variables section, click the Add Environment Variable button.
  10. To configure the PATH:



Environment Variables page

- a. Enter *PATH* in the Name field.

- b. Enter the absolute path to the BusinessObjects Enterprise XI win32\_86 directory in the Value field.

If you have not changed the default directory for Business Objects, the setting for this field would be “C:\Program Files\Business Objects\BusinessObjects Enterprise 11.5\win32\_x86”. If the default path was changed for your installation of BusinessObjects Enterprise XI, modify the path accordingly.

- c. Select the Append check box.
- d. Click Apply.
- e. Click No when you receive the message that the application server must be restarted before the changes take affect. You can restart the server later.

11. On the Administration tab, click the Server Properties link.

12. To change the memory allocation:

| Command Line Options |                                                                 |
|----------------------|-----------------------------------------------------------------|
| Java Executable      |                                                                 |
| OC4J Options         |                                                                 |
| Java Options         | /config/java2.policy -Djava.awt.headless=true -Xms128m -Xmx512m |

Command Line Options page

- a. In the Java Options box, add a space, then append *-Xms128m -Xmx512m* to the existing entry.
- b. Click Apply.
- c. Click Yes when you receive the message that the application server must be restarted before the changes take affect.

## Deploying the BusinessObjects Enterprise XI Launchpad Applications for OAS on Windows

To deploy the Launchpad applications for OAS on Windows:

1. Click the Applications tab from the server home.

OC4J: Home

Home Applications Administration

Page Refreshed Mar 3, 2006 2:54:58 PM

Default Application Name [default](#)  
 Default Application Path [application.xml](#)

Deployed Applications Deploy EAR file Deploy WAR file

Edit Undeploy Redeploy

| Select                           | Name              | Path                                  | Parent Application | Active Requests | Request Processing Time (seconds) | Active EJB Methods |
|----------------------------------|-------------------|---------------------------------------|--------------------|-----------------|-----------------------------------|--------------------|
| <input checked="" type="radio"/> | ADFBCManager      | ../applications/ADFBCManager.ear      | default            | 0               | 0.00                              | 0                  |
| <input type="radio"/>            | BC4J              | ../applications/BC4J.ear              | default            | 0               | 0.00                              | 0                  |
| <input type="radio"/>            | IsWebCacheWorking | ../applications/IsWebCacheWorking.ear | default            | 0               | 0.00                              | 0                  |

Deployed Applications page

2. Click the Deploy WAR file button.
3. Click the Browse button and locate the file <BOE\_DIR>\Enterprise 11.5\java\applications\pswebcompadapter.war, where <BOE\_DIR> is the location where you installed BusinessObjects Enterprise XI.

### Deploy Web Application

Select the Web Application (.war file) you wish to deploy. This web application will be wrapped into a J2EE

Web Application

Specify the name you would like this application to be called and the URL to map this web application to.

Application Name

Map to URL

Deploy Web Application page

4. Enter *pswebcompadapter* in the Application Name field.
5. Enter */businessobjects* as context root in the Map to URL field.
6. Click Deploy.
7. Repeat steps 1 through 6, but use the following values:
 

|                                  |                                                          |
|----------------------------------|----------------------------------------------------------|
| <b>File</b>                      | <BOE_DIR>\Enterprise 11.5\java\applications\jsfadmin.war |
| <b>Application name</b>          | jsfadmin                                                 |
| <b>Context root (Map to URL)</b> | /jsfadmin                                                |
8. Repeat steps 1 through 6, but use the following values:
 

|                                  |                                                         |
|----------------------------------|---------------------------------------------------------|
| <b>File</b>                      | <BOE_DIR>\Enterprise 11.5\java\applications\psadmin.war |
| <b>Application name</b>          | psadmin                                                 |
| <b>Context root (Map to URL)</b> | /businessobjects/enterprise115/adminlaunch              |
9. Repeat steps 1 through 6, but use the following values:
 

|                                  |                                                           |
|----------------------------------|-----------------------------------------------------------|
| <b>File</b>                      | <BOE_DIR>\Enterprise 11.5\java\applications\psdesktop.war |
| <b>Application name</b>          | psdesktop                                                 |
| <b>Context root (Map to URL)</b> | /businessobjects/enterprise115/desktoplaunch              |
10. Repeat steps 1 through 6, but use the following values:
 

|                                  |                                                          |
|----------------------------------|----------------------------------------------------------|
| <b>File</b>                      | <BOE_DIR>\Enterprise 11.5\java\applications\ psadhoc.war |
| <b>Application name</b>          | psadhoc                                                  |
| <b>Context root (Map to URL)</b> | /businessobjects/enterprise115/adhoc                     |

---

**Note.** The file *pswebcompadapter.war* has to be deployed first, followed by *jsfadmin.war* and then *psadmin.war*. The files *psdesktop.war* and *psadhoc.war* don't depend on other war files, so they can be deployed at any time.

---

11. To verify the OAS configuration:
  - a. Open a new browser window.
  - b. Enter the following URL:  
 http://<machine\_name>:<port>/businessobjects/enterprise115/adminlaunch  
 For <machine\_name> and <port> substitute the name of your machine and port.



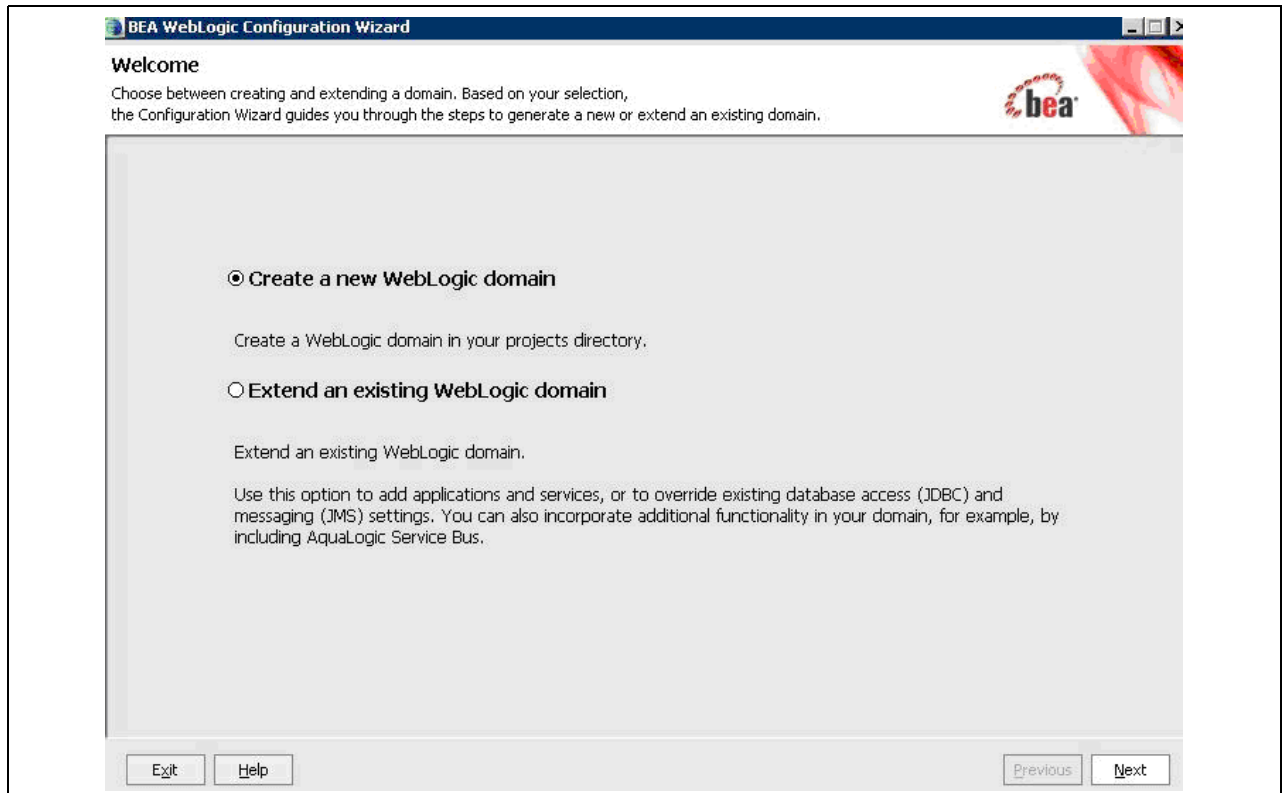
BusinessObjects Enterprise Administration Launchpad window

- c. Select Central Management Console and log on as administrator (no password) to confirm that you can log in.

## Creating a WebLogic Server on Windows

Before beginning this procedure, you must have installed BEA WebLogic 9.2 on the server where BusinessObjects Enterprise XI is installed.

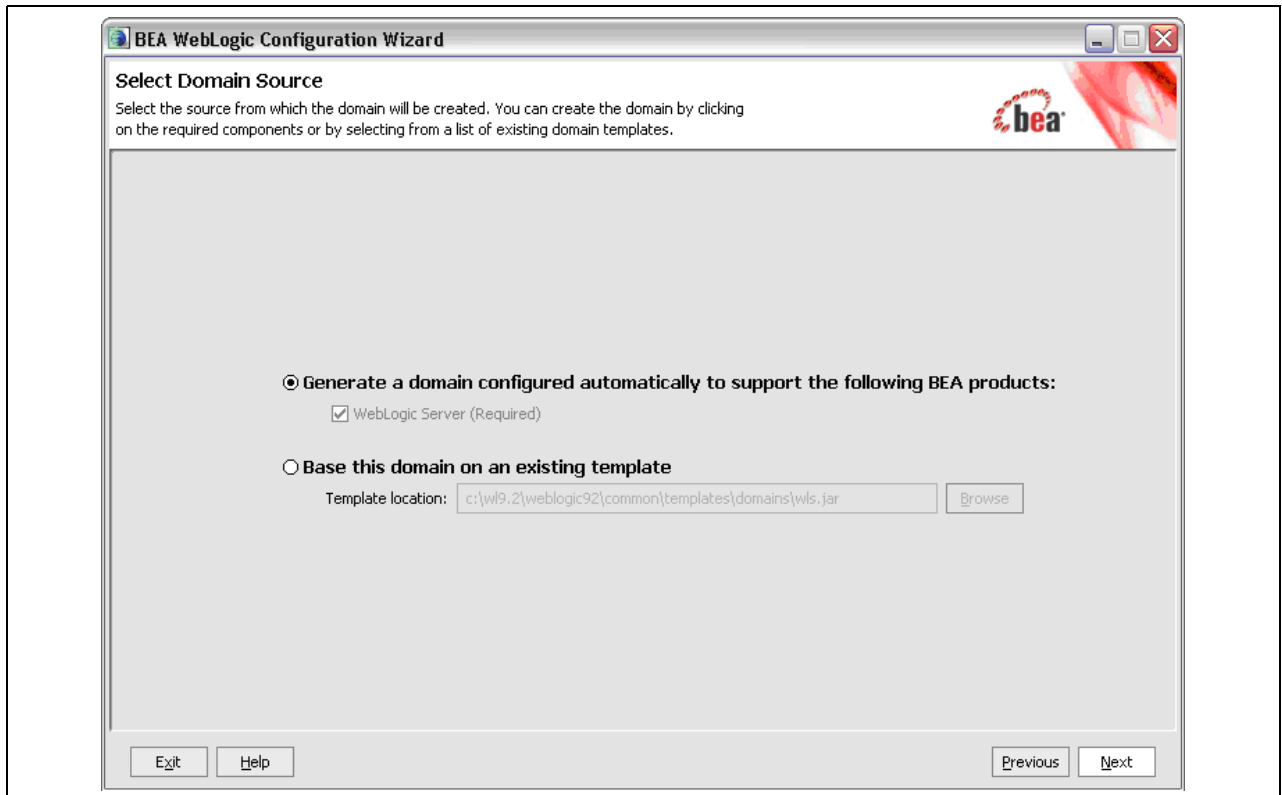
1. Start the Configuration Wizard. Navigate to Start —> Programs —> BEA Products —> Tools —> Configuration Wizard.
2. Verify that “Create a New Weblogic Configuration” is selected and click Next.



BEA WebLogic Configuration Wizard Welcome Window

The Select a Domain Source window appears.

3. Select "Generate a domain configured automatically to support the following BEA products:"  
"WebLogic Server (Required)"



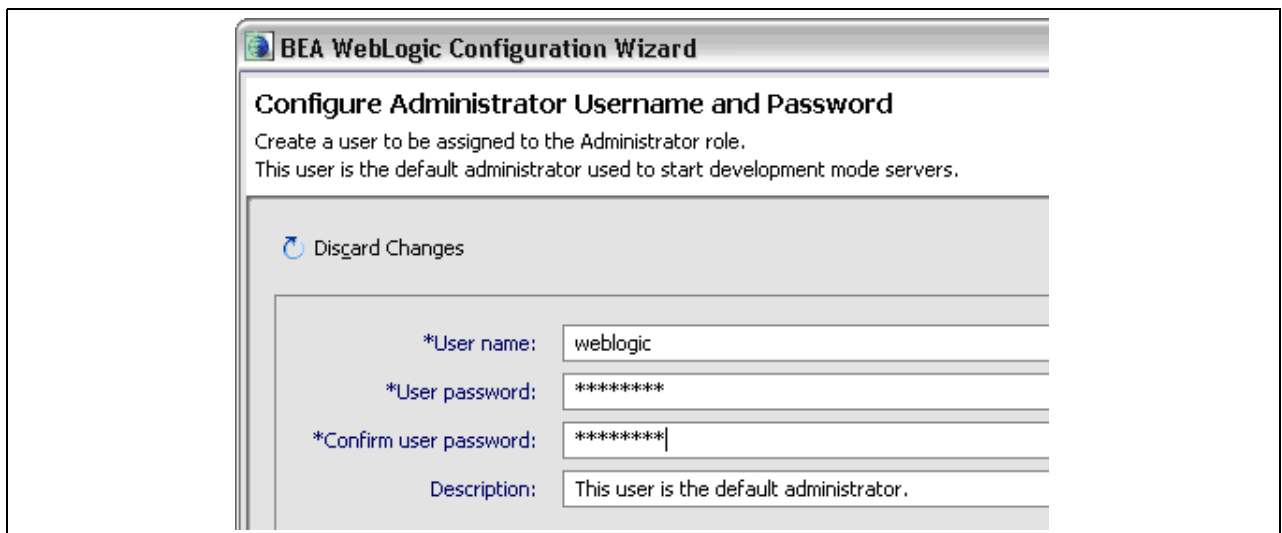
Select a Domain Source Window

4. Enter a password, confirm the password, and click Next.

---

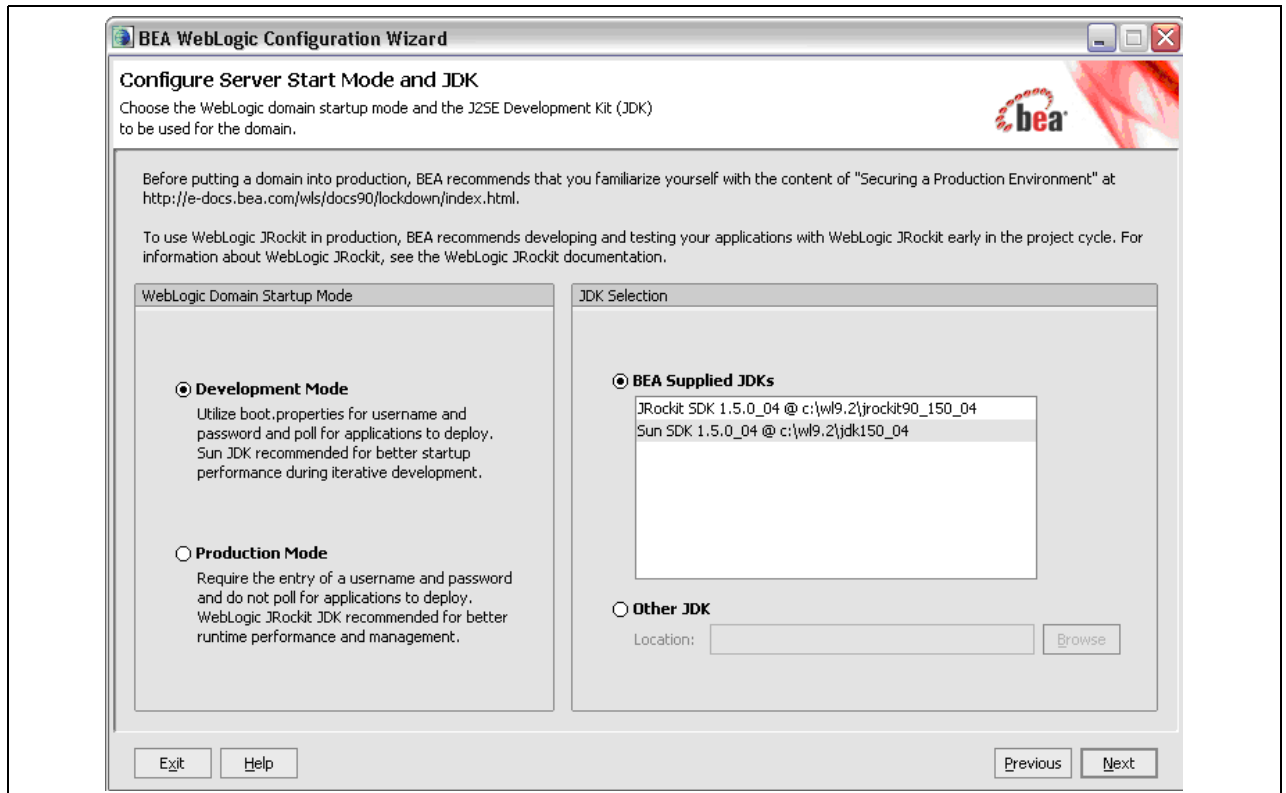
**Note.** *password* is often used as the password when testing.

---



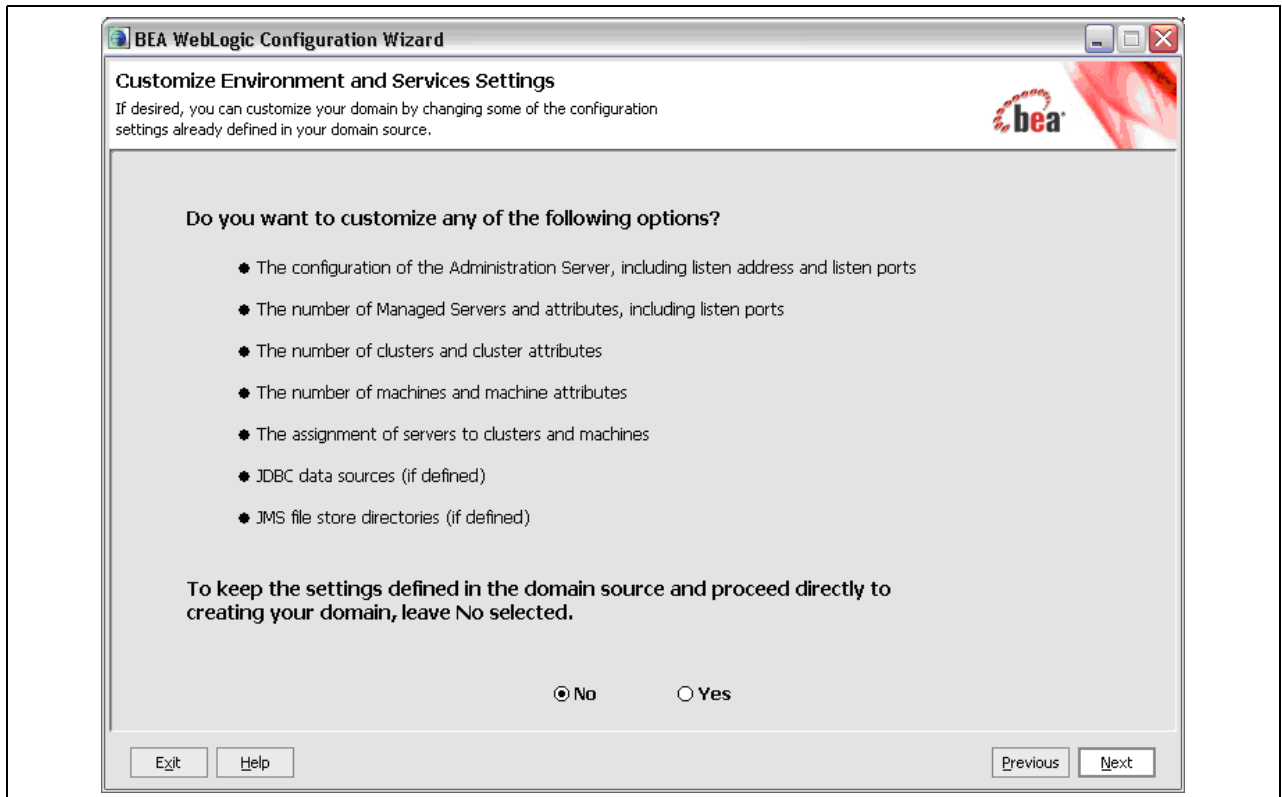
Configure Administrator User name and Password Window

5. On the “Configure Server Start Mode and Java SDK” window, select the “Development Mode” radio button and any supported Java SDK you installed, and click Next.



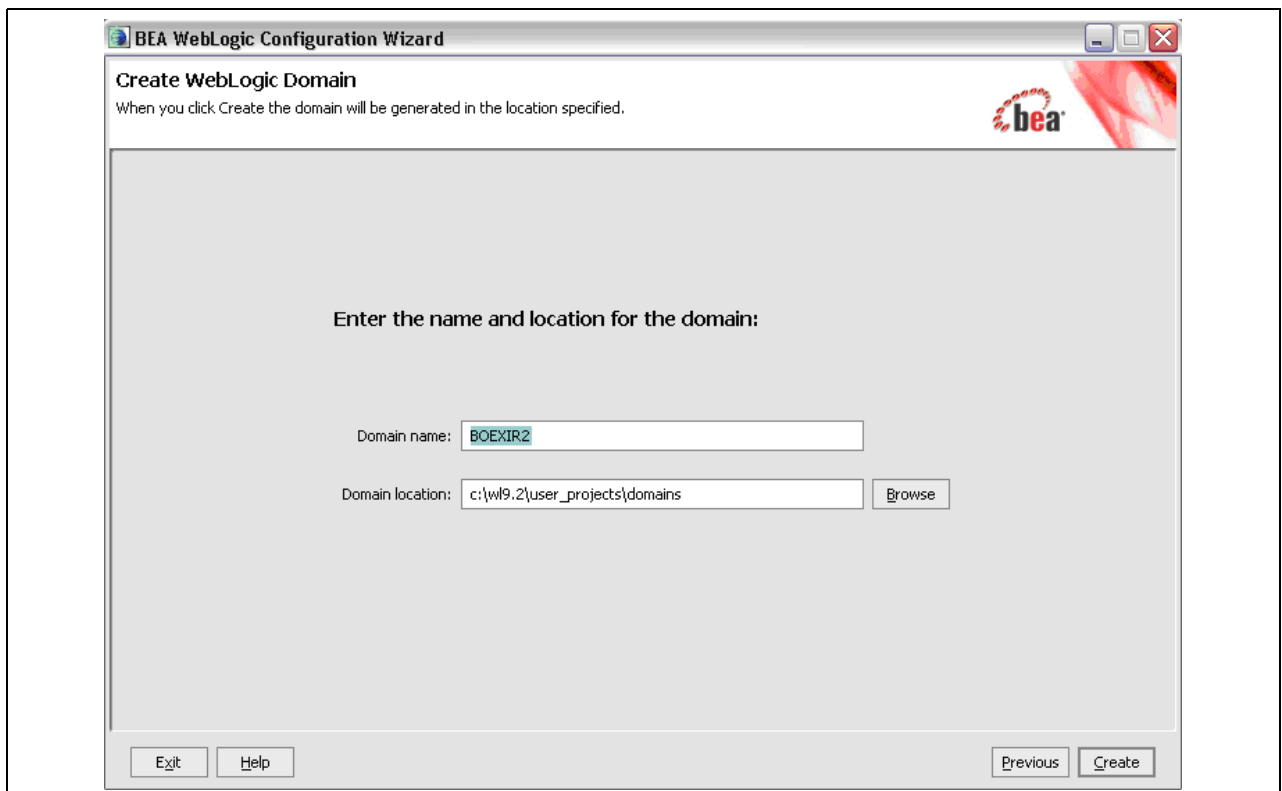
Configuring the Server Start Mode and JDK window

- On the "Customize Environment and Services Settings" window, select the "No" radio button as default and click Next.



Customize Environment and Service Settings Window

7. Enter a meaningful domain name, like *BOEXIR2*, select the location of the domain and click Create.



Create WebLogic Domain Window



8. Select Done to complete the wizard. You have now created a web server at the default port 7001
9. Start the Web Server. Navigate to Select Start —> Programs —> BEA Products —> User Projects —> <mydomain> —> Start Admin Server for WebLogic Server Domain.

An MS-DOS window opens. Wait until a message containing the phrase “Server started in RUNNING mode” appears, indicating that the web server is active.

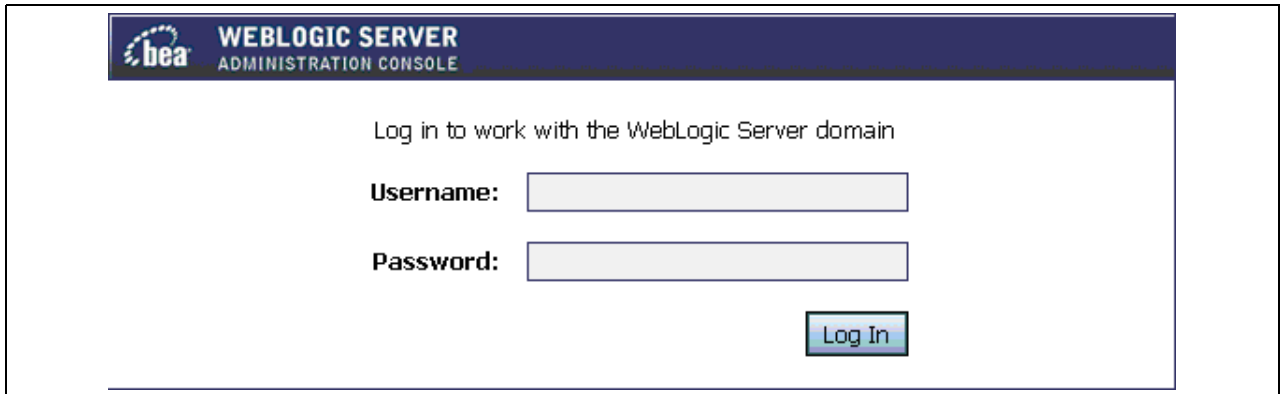
---

**Note.** You perform this step to start the web server. You will need to perform this step after you reboot the machine or close down the WebLogic web server.

---

10. To confirm that you can log in to the web server, enter the URL *http://<machinename>:7001/console* in a browser.
11. In the login window, enter the user name and password for the WebLogic Admin that you entered during your installation of WebLogic.

Click the Sign In button.



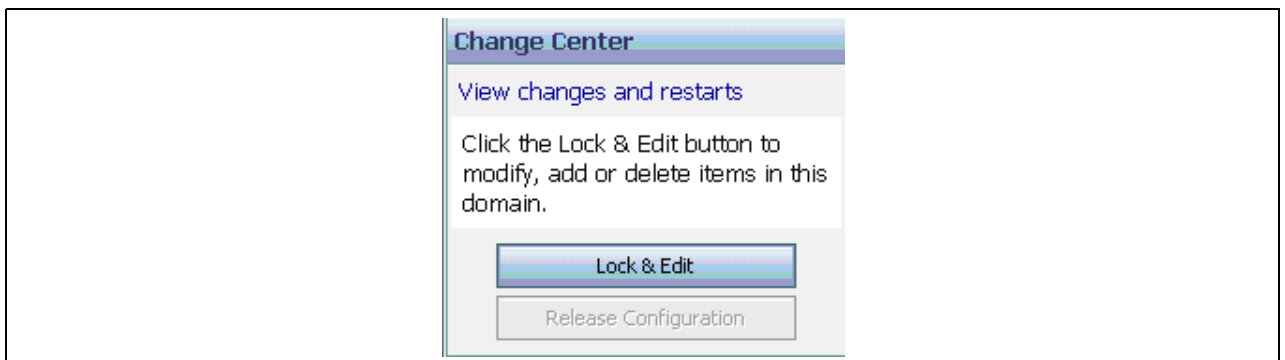
The image shows the WebLogic Administration Console login window. At the top is a dark blue header with the BEA logo and the text "WEBLOGIC SERVER ADMINISTRATION CONSOLE". Below the header, the text "Log in to work with the WebLogic Server domain" is displayed. There are two input fields: "Username:" and "Password:". Below the password field is a "Log In" button.

WebLogic Administration Console Login Window

## Deploying the BusinessObjects Enterprise XI Release 2 Launchpad Applications for WebLogic on Windows

This procedure assumes that you have logged into the WebLogic web server in a browser.

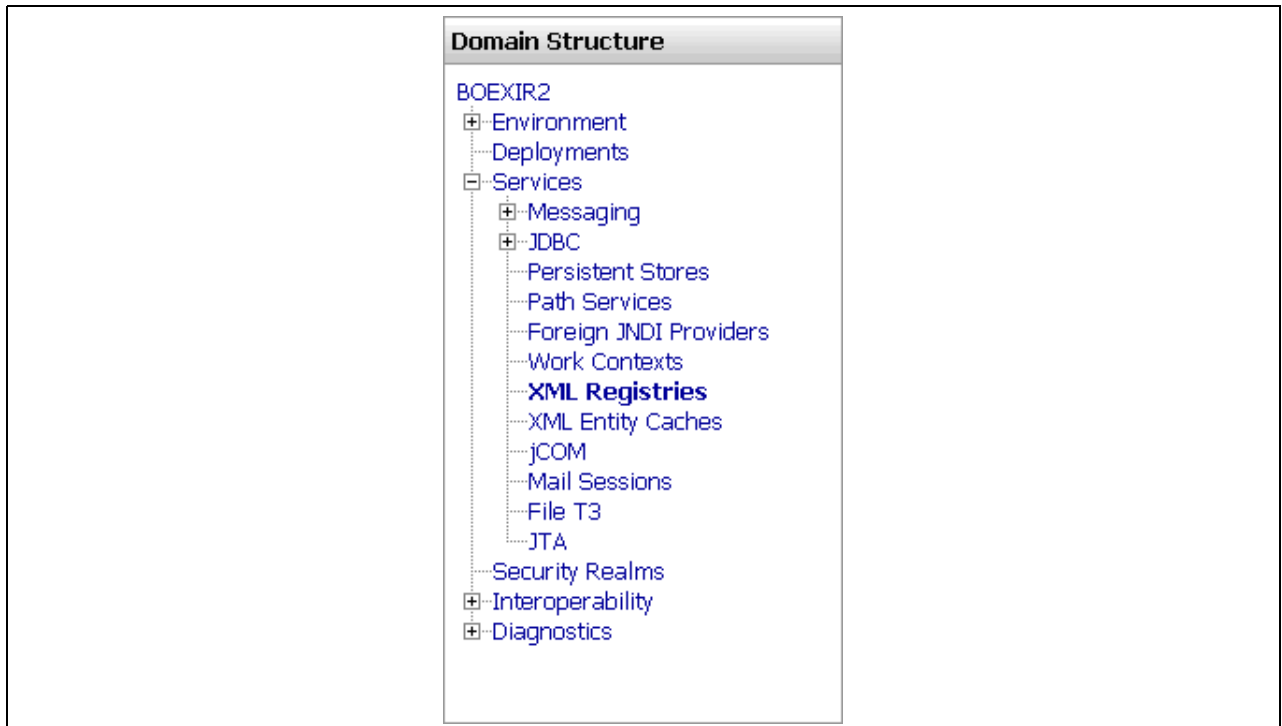
1. In the Change Center of the Administration Console, click Lock & Edit .



The image shows the Change Center window in the WebLogic Administration Console. It has a title bar that says "Change Center". Below the title bar, the text "View changes and restarts" is displayed. Below that, a message says "Click the Lock & Edit button to modify, add or delete items in this domain." At the bottom, there are two buttons: "Lock & Edit" and "Release Configuration".

Change Center of the Administration Console Window

2. On the Console's left pane, click the XML Registries entry.



Selecting the XML Registries Option

- On the Console's right pane, click the New button.



Clicking the New button in the XML Registries Window

- Enter the following details:

Name: BusinessObjects Enterprise Infoview

Document Builder Factory: weblogic.apache.xerces.jaxp.DocumentBuilderFactoryImpl

SAX Parser Factory: weblogic.apache.xerces.jaxp.SAXParserFactoryImpl

Transformer Factory: weblogic.apache.xalan.processor.TransformerFactoryImpl

Creating a New XML Registry

5. Click Next and select the server to apply the change to (that is, either the Administration Server by default or the appropriate managed server).
6. Click Finish, and then click Activate the Changes for the changes to take effect.

Clicking Activate Changes

**Note.** You must restart the web server for certain configuration changes such as new XML Registry entries, to take effect. You can check the "Messages" pane of the Administration Console to know of you need to restart the WebLogic server.

Summary of XML Registries

## 7. Configure CLASSPATH, PATH and JAVA\_OPTIONS and restart the WebLogic server.

---

**Important!** You must add the above to start `WebLogic.cmd/.sh` even these are already configured as system environment variables.

---

Open the `startWebLogic.cmd` for Windows, or `startWebLogic.sh` for UNIX, in the `<bea_home>/user_projects/domains/<domain folder>/bin` folder.

```
SET CLASSPATH=C:\Program Files\Business Objects\BusinessObjects Enterprise 11.5⇒
\java\applications\cewcanative.Jar;%CLASSPATH%
```

```
SET CLASSPATH=C:\Program Files\Business Objects\BusinessObjects Enterprise 11.5⇒
\java\xalan.jar;%CLASSPATH%
```

```
SET PATH=C:\Program Files\Business Objects\BusinessObjects Enterprise 11.5⇒
\win32_x86;%PATH%
```

```
SET JAVA_OPTIONS=%JAVA_OPTIONS% -XX:PermSize=48m -XX:MaxPermSize=128m
```

A sample `startWebLogic.cmd` is given below. Refer to this sample `startWebLogic.cmd` script for guidance on where to insert the classpath, path, and java option entries noted in the instructions above. Look for the `@@@` signs.

*Sample startWebLogic.cmd Script*

```
@ECHO OFF
```

```
@REM WARNING: This file is created by the Configuration Wizard.
```

```
@REM Any changes to this script may be lost when adding extensions to this⇒
configuration.
```

```
SETLOCAL
```

```
@REM --- Start Functions ---
```

```
GOTO :ENDFUNCTIONS
```

```
:stopAll
```

```
@REM We separate the stop commands into a function so we are able to use the⇒
trap command in Unix (calling a function) to stop these services
if NOT "X%ALREADY_STOPPED%"=="X" (
 GOTO :EOF
)
```

```
@REM STOP POINTBASE (only if we started it)
```

```
if "%POINTBASE_FLAG%"=="true" (
 echo Stopping PointBase server...
 call "%WL_HOME%\common\bin\stopPointBase.cmd" -port=%POINTBASE_PORT% -name=⇒
%POINTBASE_DBNAME% >"%DOMAIN_HOME%\pointbaseShutdown.log" 2>&1
```

```
 echo PointBase server stopped.
)
```

```
set ALREADY_STOPPED=true
```

```

@REM Restore IP configuration the node manager starts IP Migration
if NOT "%SERVER_IP%"==" (
 call "%WL_HOME%\common\bin\wlsifconfig.cmd" -removeif "%IFNAME%" "%SERVER_IP%"
)
GOTO :EOF

:ENDFUNCTIONS

@REM --- End Functions ---

@REM *****
@REM This script is used to start WebLogic Server for this domain.
@REM
@REM To create your own start script for your domain, you can initialize the
@REM environment by calling @USERDOMAINHOME\setDomainEnv.
@REM
@REM setDomainEnv initializes or calls commEnv to initialize the following⇒
variables:
@REM
@REM BEA_HOME - The BEA home directory of your WebLogic installation.
@REM JAVA_HOME - Location of the version of Java used to start WebLogic
@REM Server.
@REM JAVA_VENDOR - Vendor of the JVM (i.e. BEA, HP, IBM, Sun, etc.)
@REM PATH - JDK and WebLogic directories are added to system path.
@REM WEBLOGIC_CLASSPATH
@REM - Classpath needed to start WebLogic Server.
@REM PATCH_CLASSPATH - Classpath used for patches
@REM PATCH_LIBPATH - Library path used for patches
@REM PATCH_PATH - Path used for patches
@REM WEBLOGIC_EXTENSION_DIRS - Extension dirs for WebLogic classpath patch
@REM JAVA_VM - The java arg specifying the VM to run. (i.e.
@REM - server, -hotspot, etc.)
@REM USER_MEM_ARGS - The variable to override the standard memory arguments
@REM passed to java.
@REM PRODUCTION_MODE - The variable that determines whether Weblogic Server is⇒
started in production mode.
@REM POINTBASE_HOME - Point Base home directory.
@REM POINTBASE_CLASSPATH
@REM - Classpath needed to start PointBase.
@REM
@REM Other variables used in this script include:
@REM SERVER_NAME - Name of the weblogic server.
@REM JAVA_OPTIONS - Java command-line options for running the server. (These
@REM will be tagged on to the end of the JAVA_VM and
@REM MEM_ARGS)
@REM
@REM For additional information, refer to the WebLogic Server Administration
@REM Console Online Help(http://e-docs.bea.com/wls/docs92/ConsoleHelp⇒/startstop.html).

```

```

@REM *****

@REM Call setDomainEnv here.

set DOMAIN_HOME=c:\wl9.2\user_projects\domains\BOEXIR2
for %%i in ("%DOMAIN_HOME%") do set DOMAIN_HOME=%%~fsi

call "%DOMAIN_HOME%\bin\setDomainEnv.cmd" %*

set SAVE_JAVA_OPTIONS=%JAVA_OPTIONS%

set SAVE_CLASSPATH=%CLASSPATH%

@REM Start PointBase

set PB_DEBUG_LEVEL=0

if "%POINTBASE_FLAG%"=="true" (
 call "%WL_HOME%\common\bin\startPointBase.cmd" -port=%POINTBASE_PORT% -debug=>
 %PB_DEBUG_LEVEL% -console=false -background=true -ini=%DOMAIN_HOME%\
 \pointbase.ini >"%DOMAIN_HOME%\pointbase.log" 2>&1
)

set JAVA_OPTIONS=%SAVE_JAVA_OPTIONS%

set SAVE_JAVA_OPTIONS=

set CLASSPATH=%SAVE_CLASSPATH%

set SAVE_CLASSPATH=

if "%PRODUCTION_MODE%"=="true" (
 set WLS_DISPLAY_MODE=Production
) else (
 set WLS_DISPLAY_MODE=Development
)

if NOT "%WLS_USER%"==" " (
 set JAVA_OPTIONS=%JAVA_OPTIONS% -Dweblogic.management.username=%WLS_USER%
)

if NOT "%WLS_PW%"==" " (
 set JAVA_OPTIONS=%JAVA_OPTIONS% -Dweblogic.management.password=%WLS_PW%
)

set CLASSPATH=%CLASSPATH%;%MEDREC_WEBLOGIC_CLASSPATH%

echo .

```

[illegible]

[illegible]



```

@REM Set interface name.

if NOT "%Interface%"==" " (
 set IFNAME=%Interface%
) else (
 set IFNAME=
)

@REM Set IP Mask.

if NOT "%NetMask%"==" " (
 set IPMASK=%NetMask%
) else (
 set IPMASK=
)

@REM Perform IP Migration if SERVER_IP is set by node manager.

if NOT "%SERVER_IP%"==" " (
 call "%WL_HOME%\common\bin\wlsifconfig.cmd" -addif "%IFNAME%" "%SERVER_IP%"⇒
 "%IPMASK%"
)

@REM START WEBLOGIC

echo starting weblogic with Java version:

%JAVA_HOME%\bin\java %JAVA_VM% -version

if "%WLS_REDIRECT_LOG%"==" " (
 echo Starting WLS with line:
 echo %JAVA_HOME%\bin\java %JAVA_VM% %MEM_ARGS% %JAVA_OPTIONS% -Dweblogic.Name⇒
 %SERVER_NAME% -Djava.security.policy=%WL_HOME%\server\lib\weblogic.policy ⇒
 %PROXY_SETTINGS% %SERVER_CLASS%
 %JAVA_HOME%\bin\java %JAVA_VM% %MEM_ARGS% %JAVA_OPTIONS% -Dweblogic.Name⇒
 %SERVER_NAME% -Djava.security.policy=%WL_HOME%\server\lib\weblogic.policy⇒
 %PROXY_SETTINGS% %SERVER_CLASS%
) else (
 echo Redirecting output from WLS window to %WLS_REDIRECT_LOG%
 %JAVA_HOME%\bin\java %JAVA_VM% %MEM_ARGS% %JAVA_OPTIONS% -Dweblogic.Name⇒
 %SERVER_NAME% -Djava.security.policy=%WL_HOME%\server\lib\weblogic.policy⇒
 %PROXY_SETTINGS% %SERVER_CLASS% >"%WLS_REDIRECT_LOG%" 2>&1
)

CALL :stopAll

popd

@REM Exit this script only if we have been told to exit.

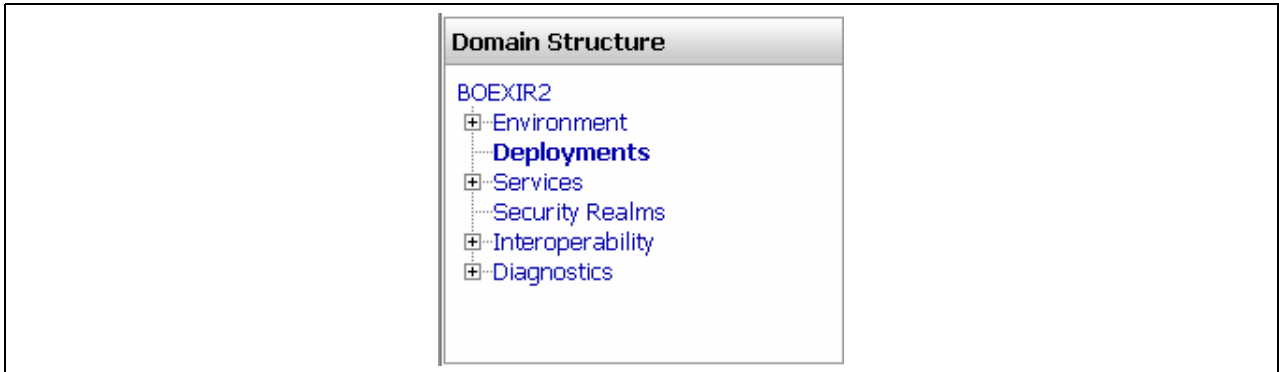
```

```
if "%doExitFlag%"=="true" (
 exit
)
```

ENDLOCAL

*End of the startWebLogic.cmd Script*

8. On the Domain Structure pane, click Deployments.



Selecting Deployments in the Domain Structure Pane

9. Click the install button and navigate to:

#### **Windows**

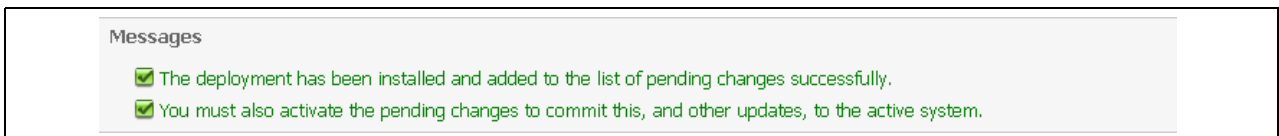
Program Files\Business Objects\BusinessObjects Enterprise 11.5\java\applications.

#### **UNIX**

\$bobje\_home/bobje/enterprise115/java/applications.

Choose the pswebcompadapter.war radio button and click the Next button.

10. Select “Install this deployment as an application” as the target style and click Next.
11. Accept all default values and click Finish.
12. Wait until the status shows Success.



Messages Window

13. On the Change Center of the Administration console, click Activate Changes, to activate the changes.

---

**Note.** This operation might take a while as BEA stages the web application, does validations during the staging and so on, which take longer than in WebLogic 8.1.x. However at runtime the performance is better.

---

14. Repeat steps 8 through 13 to deploy the jsfadmin.war application. But in Step 9 choose jsfadmin.war instead of the pswebcompadapter.war radio button.
15. Repeat steps 8 through 13 to deploy the psadmin.war application. But in Step 9 choose psadmin.war. This deploys the User launchpad application.

16. Repeat steps 8 through 13 to deploy the psdesktop.war application. In Step 9 choose psdesktop.war.
17. Repeat steps 8 through 13 to deploy the psadhoc.war application. In Step 9, choose psadhoc.war. This deploys the Crystal Reports Explorer application
18. Update the Deployment Order for CMC related applications as follows, and click Save:

pswebcompadaptor.war – 10

jsfadmin.war – 20

psadmin.war – 30

This will make sure that the web applications start in the right order.

Home > Summary of Deployments > pswebcompadaptor

### Settings for pswebcompadaptor

Overview **Deployment Plan** Configuration Security Targets Control Testing Monitoring Notes

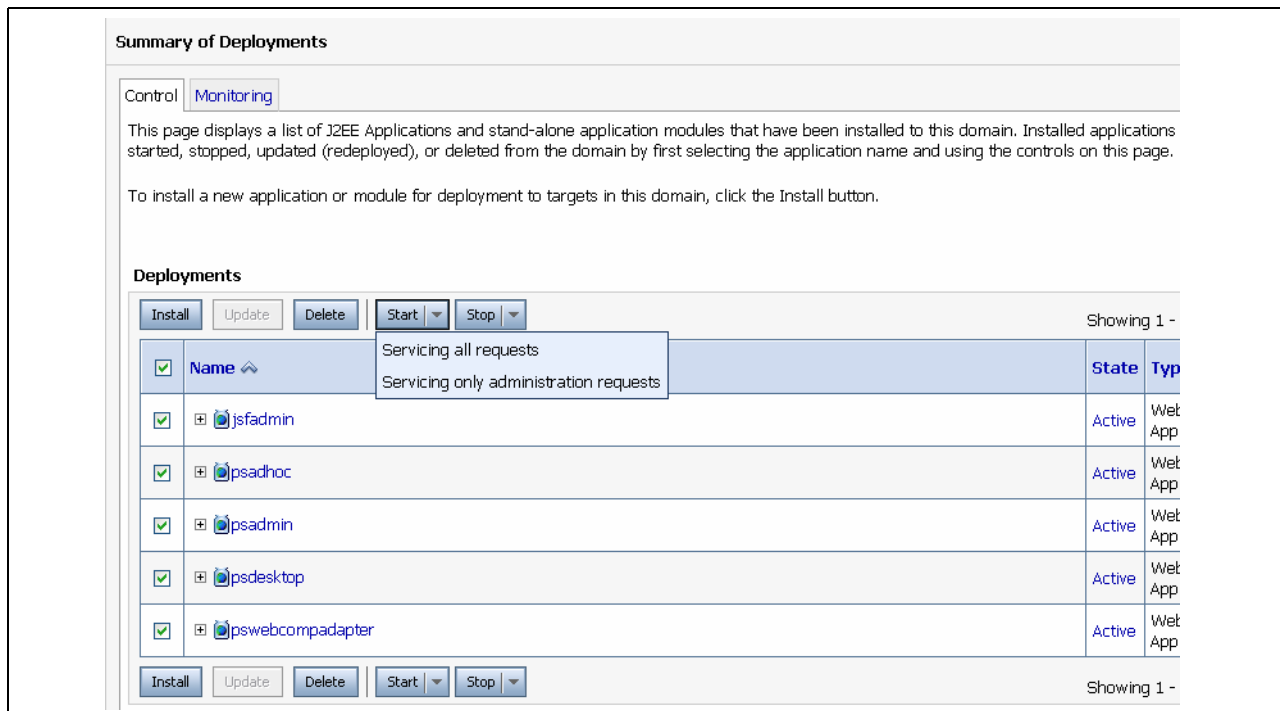
Use this page to view the installed configuration of a Web Application.

|                                                                                                              |                                                                                                          |                                                                                                                                                                   |
|--------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name:</b>                                                                                                 | pswebcompadaptor                                                                                         | The name of this application deployment. <a href="#">More Info...</a>                                                                                             |
| <b>Context Root:</b>                                                                                         | (No value specified)                                                                                     | The specific path at which this web application is deployed. <a href="#">More Info...</a>                                                                         |
| <b>Path:</b>                                                                                                 | C:\Program Files\Business Objects\BusinessObjects Enterprise 11.5\java\applications\pswebcompadaptor.war | The path to the source of the deployable unit. <a href="#">More Info...</a>                                                                                       |
| <b>Deployment Plan:</b>                                                                                      | (no plan specified)                                                                                      | The path to the deployment plan document. <a href="#">More Info...</a>                                                                                            |
| <b>Staging Mode:</b>                                                                                         | (not specified)                                                                                          | The mode that specifies whether an application is staged on the Administration Server to the IV area during application preparation. <a href="#">More Info...</a> |
| <b>Security Model:</b>                                                                                       | DDOnly                                                                                                   | The security model specifies how this deployment is secured. <a href="#">More Info...</a>                                                                         |
|  <b>Deployment Order:</b> | <input type="text" value="10"/>                                                                          | A numerical value that indicates when this unit is deployed relative to other units. <a href="#">More Info...</a>                                                 |

The Deployments Summary window

**Note.** psdesktop.war does not depend on any of the other war files so it can be deployed at any time. The remaining files have dependencies on each other, so must be deployed in a specific order. First deploy the pswebcompadaptor.war, followed by jsfadmin.war and finally psadmin.war.

19. Select all war files and click Start —> Servicing all requests.

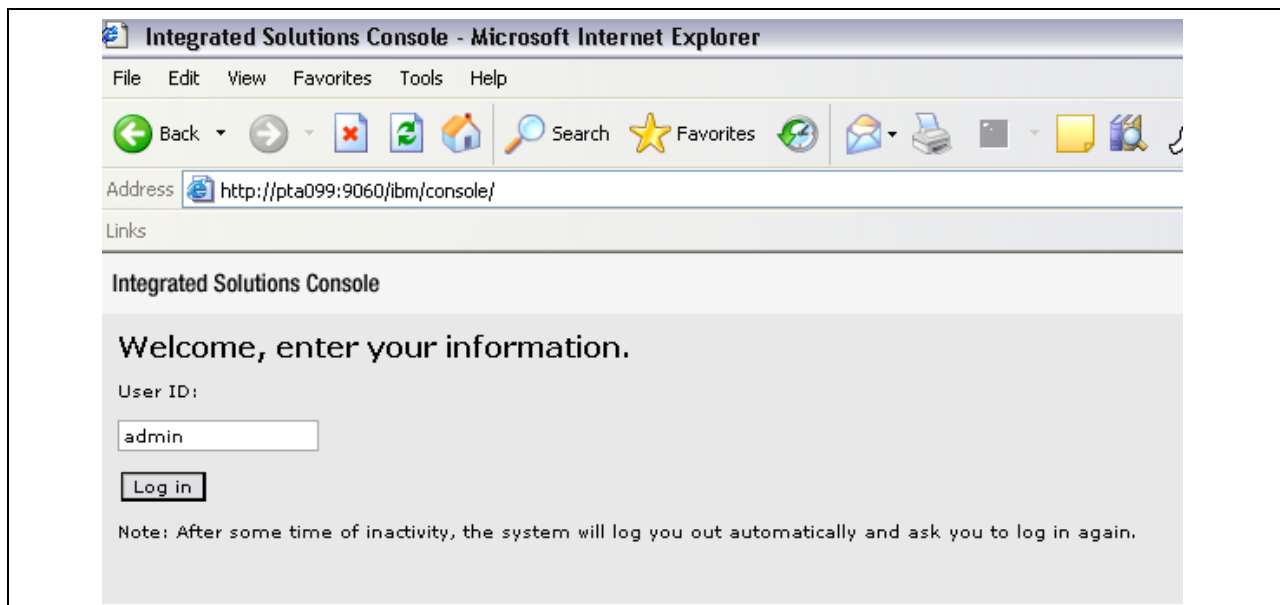


Servicing All Requests in the Deployment Summary window

## Creating a WebSphere Server on Windows

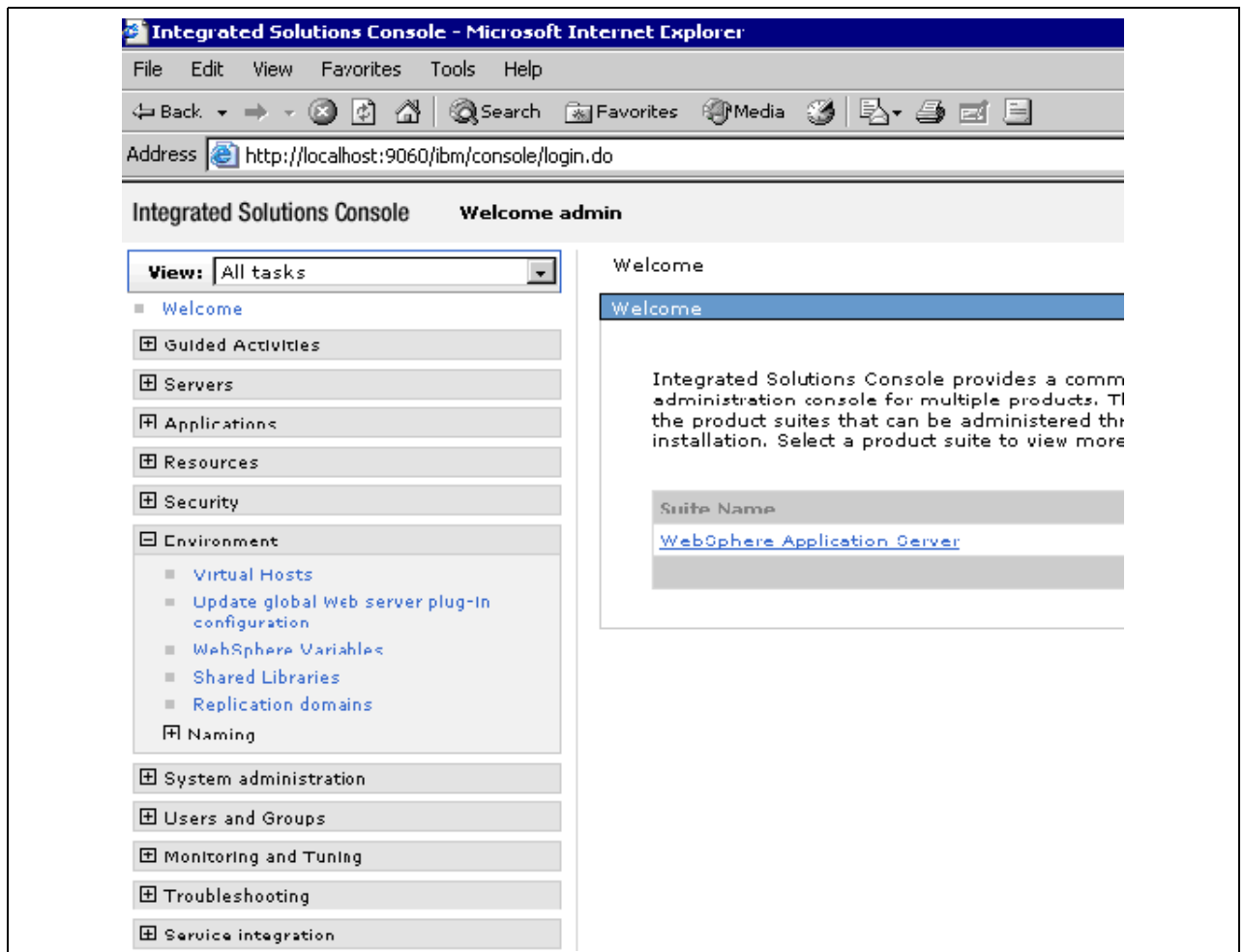
Before beginning this procedure, you must have installed IBM WebSphere on the server where BusinessObjects Enterprise XI is installed.

1. Select Start → Programs → IBM WebSphere → Application Server 6.1 → Start the Server. Wait until the server finishes starting.
2. Select Start → Programs → IBM WebSphere → Application Server 6.1 → Administrative Console.
3. Enter *admin* as the User ID and select OK.



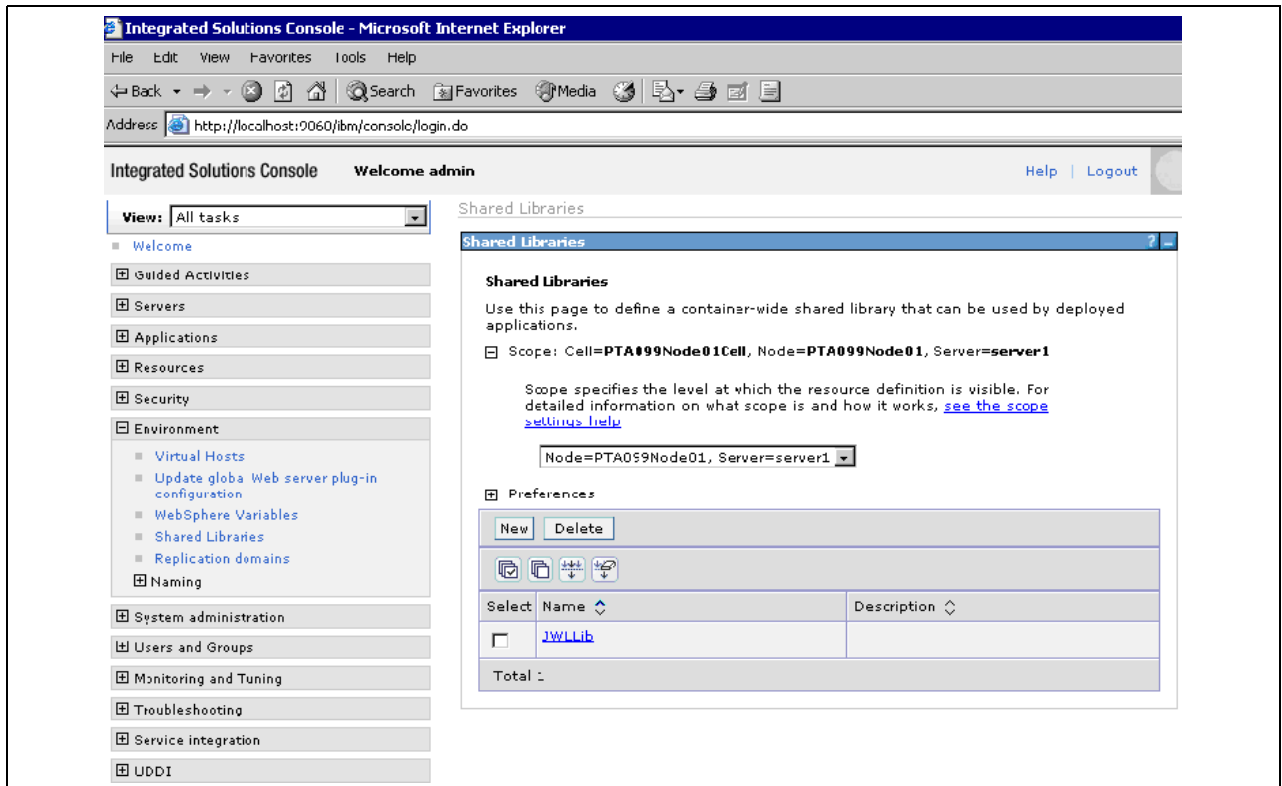
Integrated Solutions Console

- Expand the Environment node and select the Shared Libraries link.



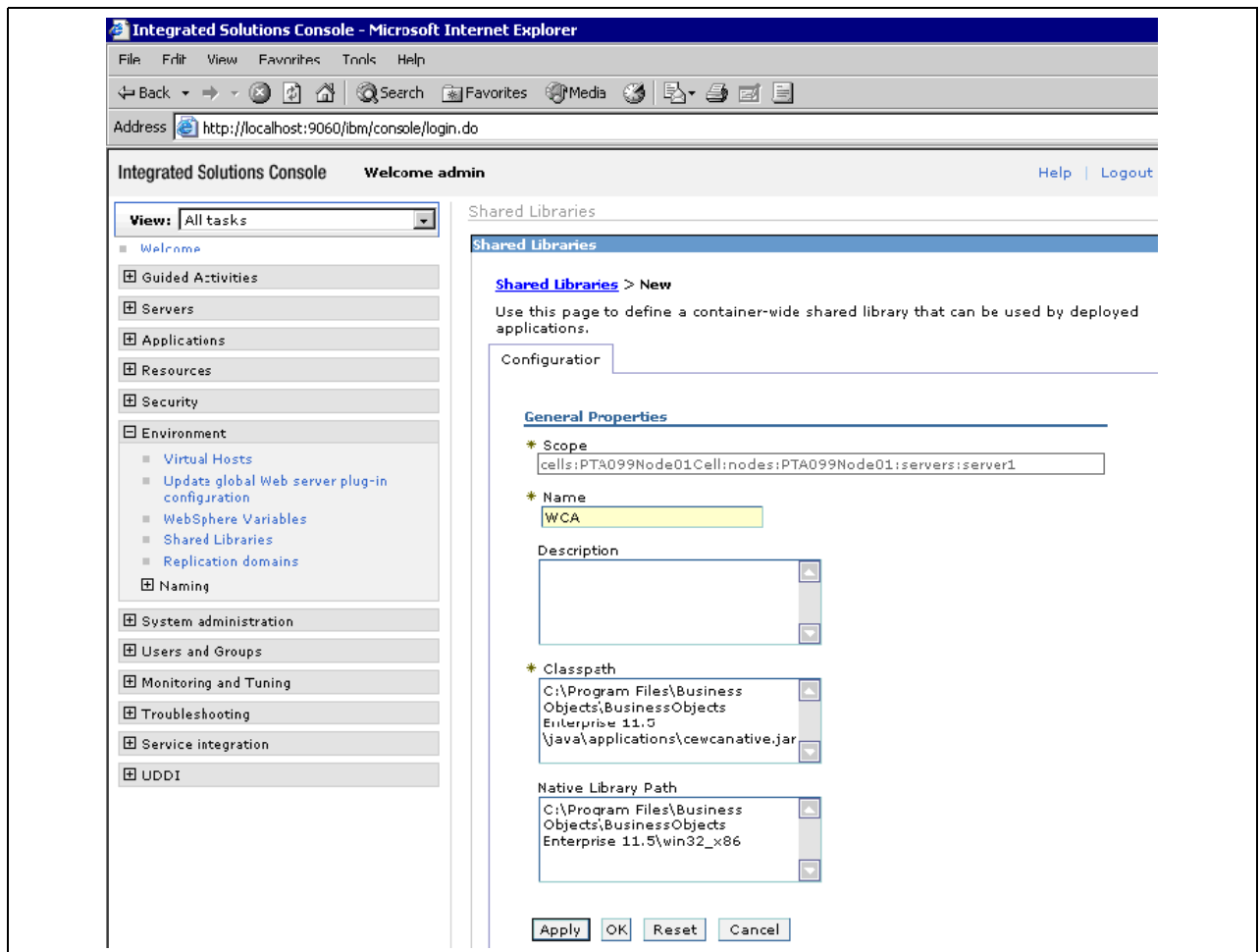
Expanding the Environment Node

- Select your Server and Node from the Scope drop down list and click New to add a new library.



Selecting Server and Node from the Scope drop down list

- Enter values for the Name, Classpath and Native Library Path as shown. Then click OK.



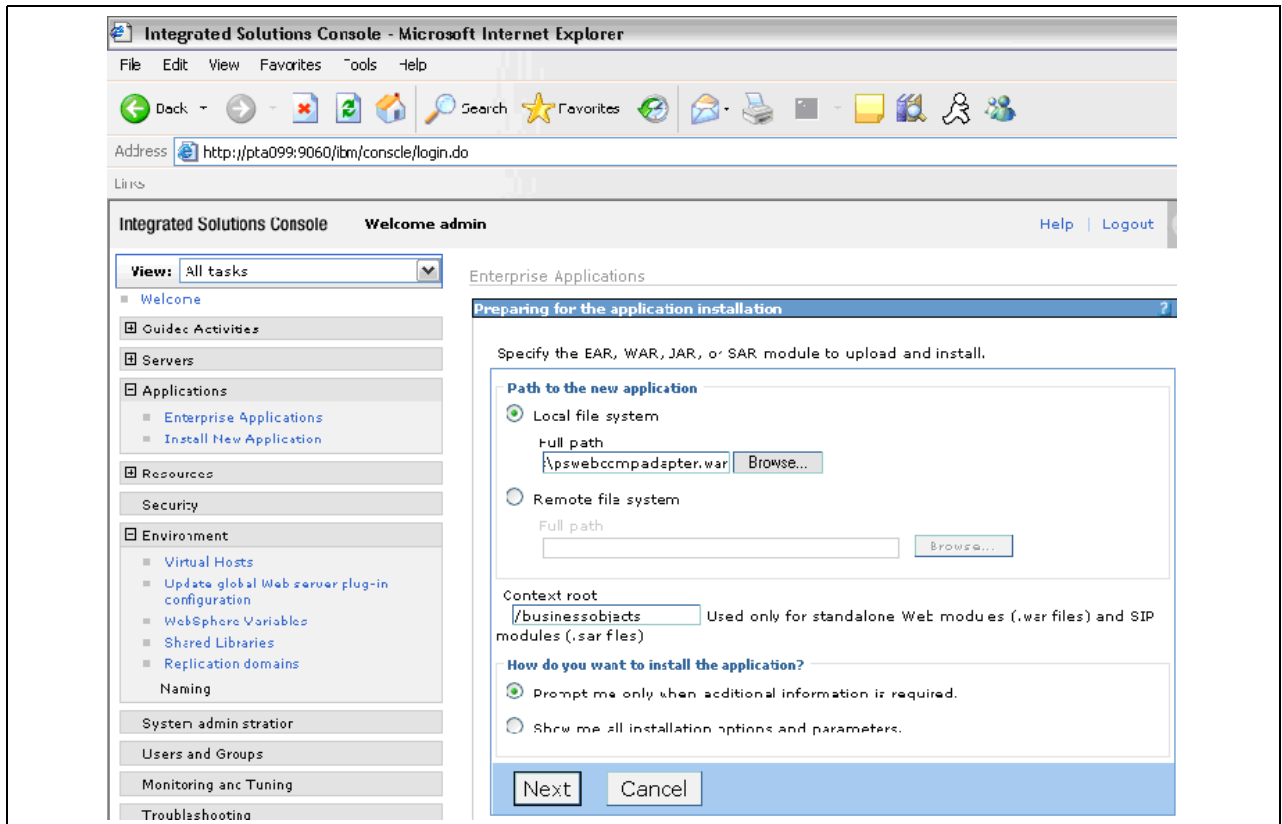
Entering values for Name, Classpath and Native Library Path

**Note.** Before you can use BusinessObjects Enterprise XI, you must complete additional installation and configuration procedures.

## Deploying the BusinessObjects Enterprise XI Launchpad Applications for WebSphere on Windows

This procedure assumes that you have logged into the WebSphere Administrative Console.

1. From the menu on the left, select Applications, Install New Application.
2. Browse to find the file `<BOE_DIR>\Enterprise11.5\java\applications\pswebcompadapter.war`, where `<BOE_DIR>` is the location where you installed BusinessObjects Enterprise XI.
3. Enter `/businessobjects` in the Context Root area.



The Context Root Area

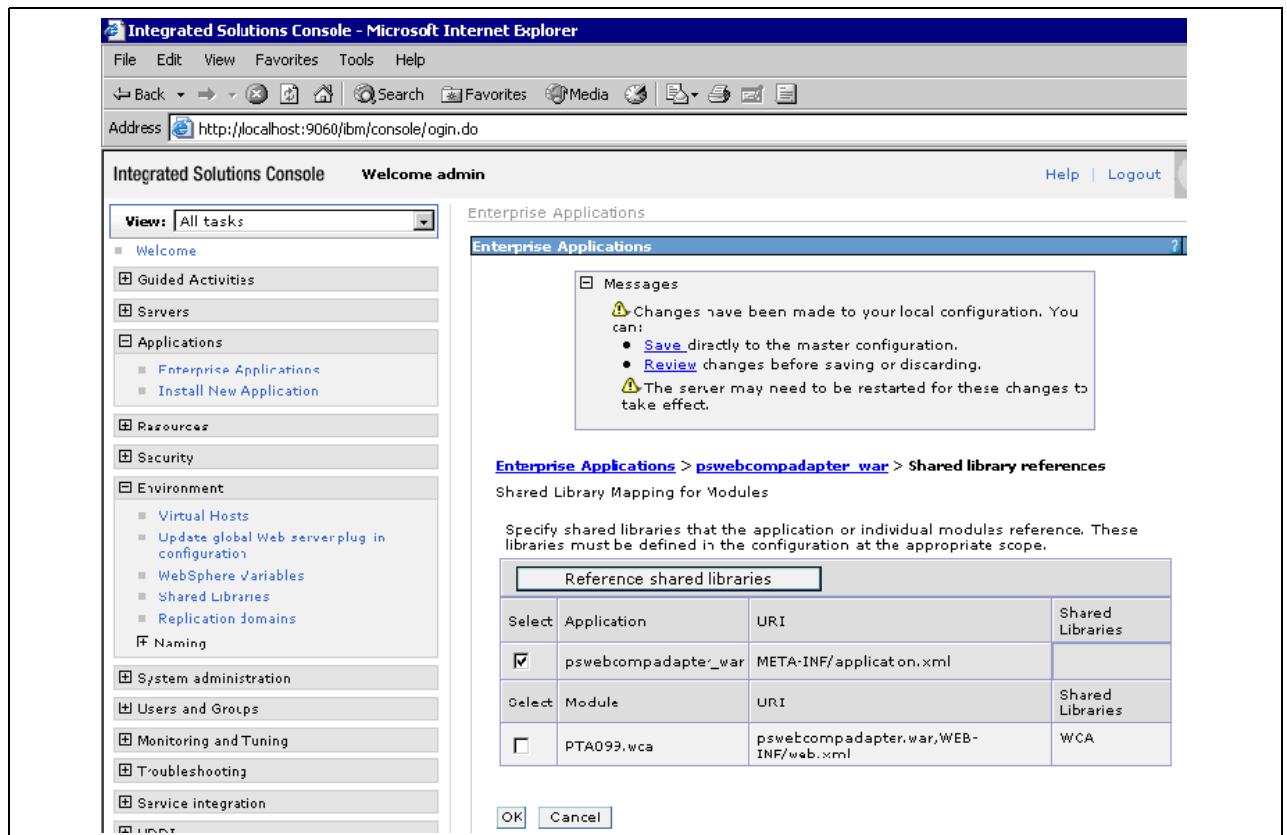
Click Next.

4. Accept all defaults on the next several windows and continue until you see a window with a Finish button.
5. Click the Finish button.

A confirmation window appears with a message similar to the following: “Application pswebcompadapter\_war installed successfully.”

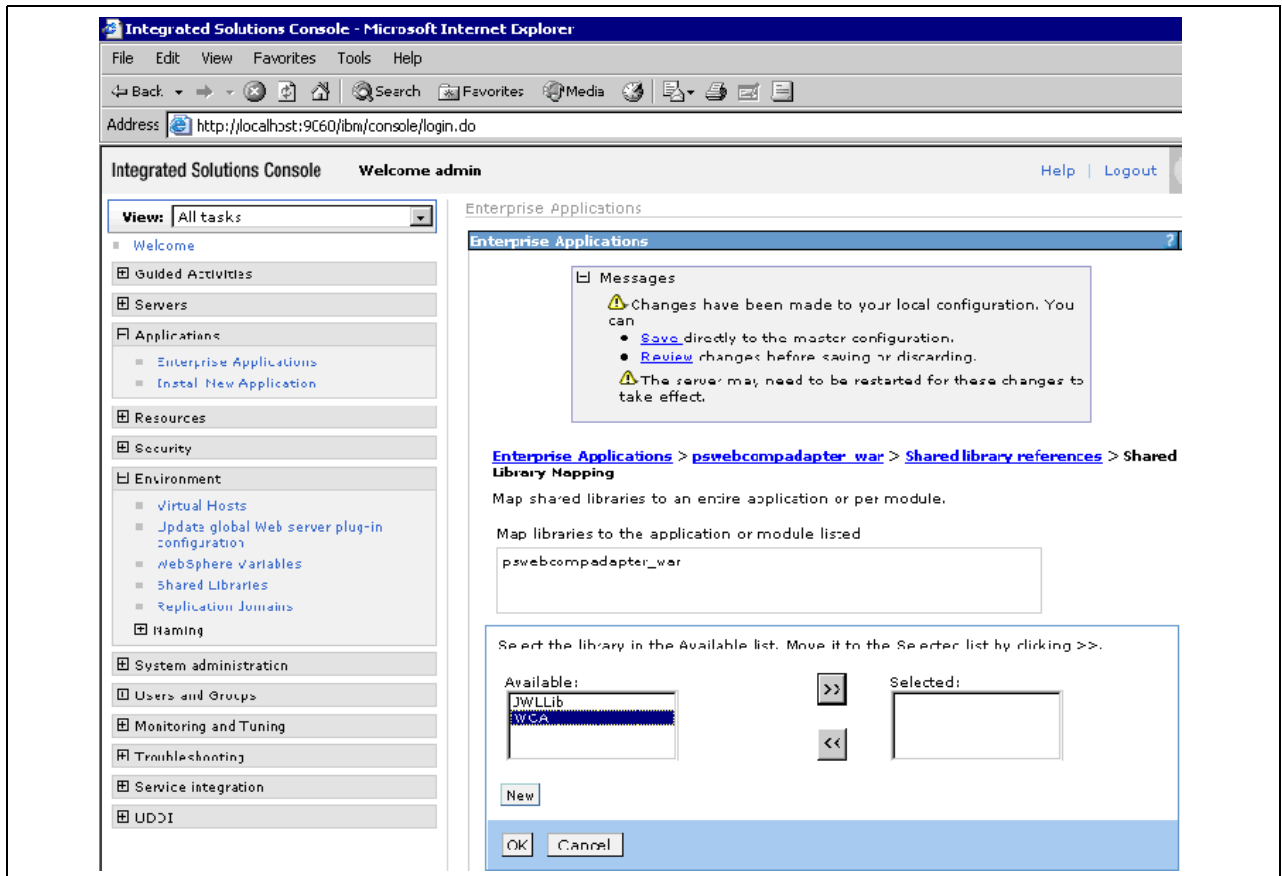
6. Select Manage Applications to see the list of applications.
7. Select the link pswebcompadapter\_war to open its configuration page.
8. Near the bottom, click on Shared Library References. Select pswebcompadapter\_war.



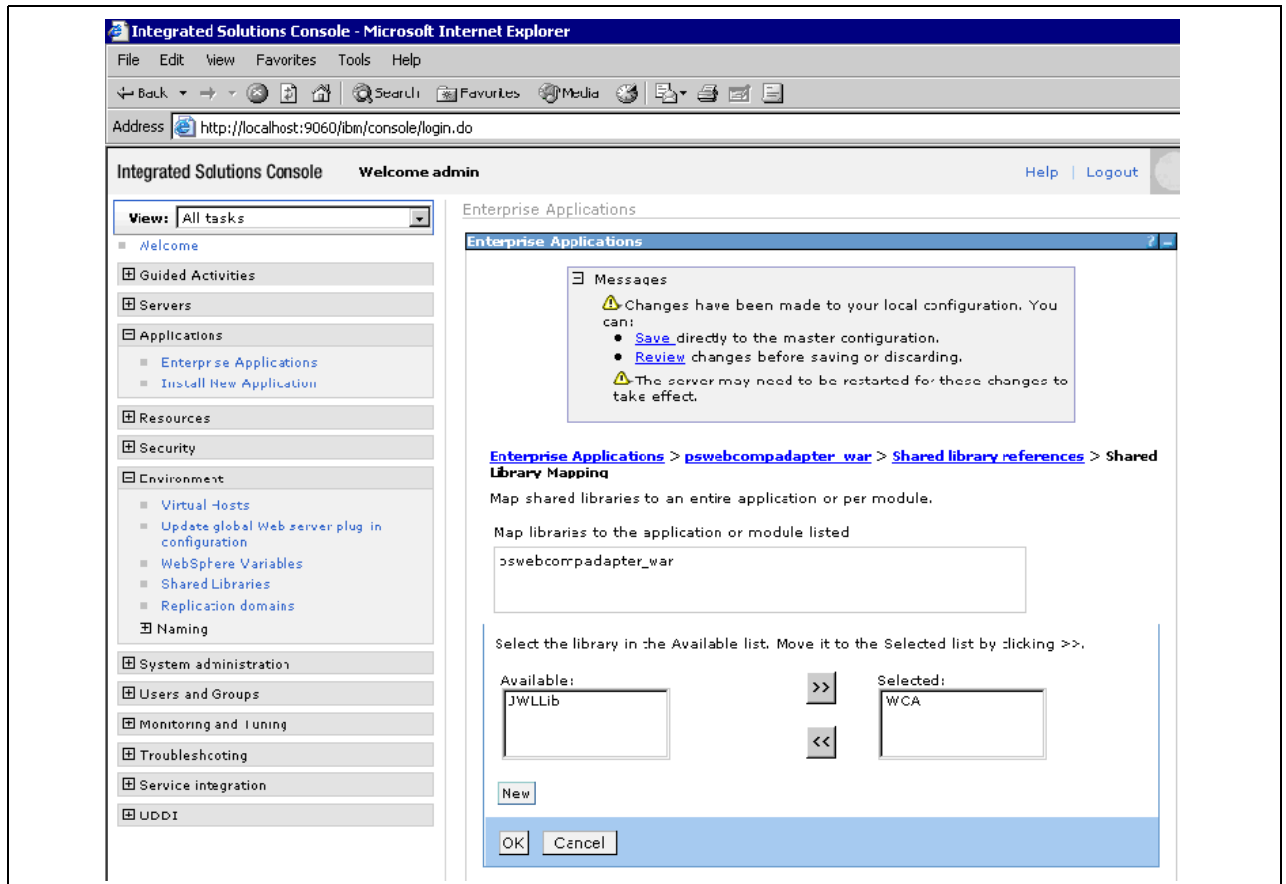


The Shared Library References area

- Click on Reference Shared libraries. Select WCA and click on the Right Arrow.



Selecting a library



Selecting a library

Click OK to save it.

10. Repeat steps 2 through 9, but use these parameters:

**File** <BOE\_DIR>\Enterprise\java\applications\psadmin.war

**Context Root** /businessobjects/enterprise115/adminlaunch

11. Repeat steps 2 through 9 with these parameters:

**File** <BOE\_DIR>\Enterprise\java\applications\psdesktop.war

**Context Root** /businessobjects/enterprise115/desktoplaunch

12. Repeat steps 2 through 9 with these parameters:

**File** <BOE\_DIR>\Enterprise\java\applications\psadhoc.war

**Context Root** /adhoc

13. Repeat steps 2 through 9 with these parameters:

**File** <BOE\_DIR>\Enterprise\java\applications\jsfadmin.war

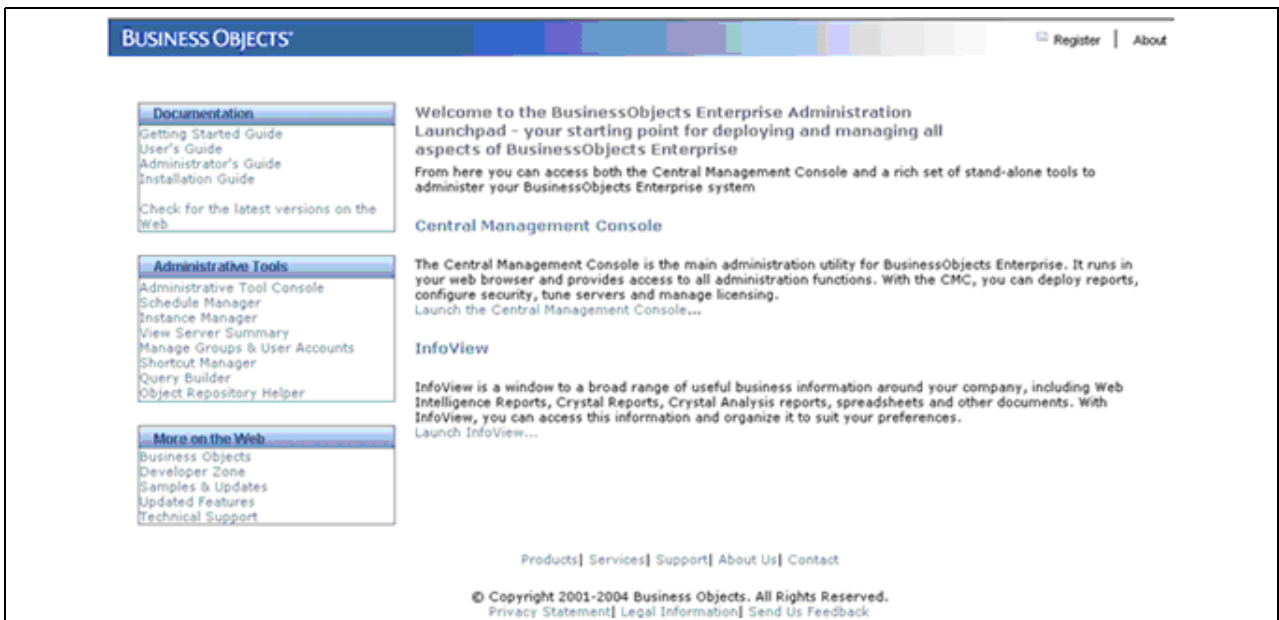
**Context Root** /jsfadmin

14. Select the link Save to permanently save all changes.

15. To restart the server, select Start —> Programs —> IBM WebSphere —> Application Server 6.1 —> Start the Server.

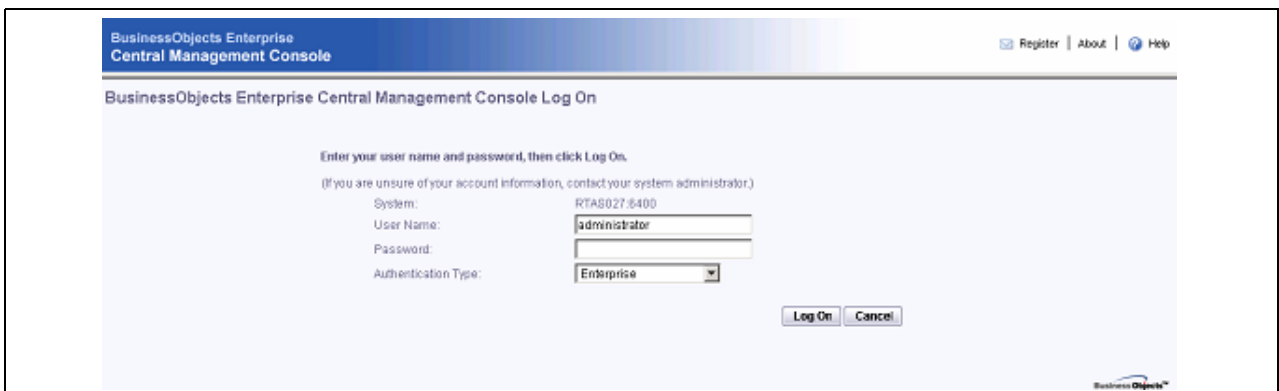
16. In a new browser window, enter the following URL for the admin launchpad (where <machine\_name> is the computer name):

`http://<machine_name>:9080/businessobjects/enterprise115/adminlaunch/`



The Business Objects window

17. Select the Central Management Console link and enter administrator (no password) to confirm that you can log in.



The Central Management Console

18. Enter the following URL for the user launchpad (where <machine\_name> is the computer name):

`http://<machine_name>:9080/businessobjects/enterprise115/desktoplaunch/`

The Business Objects Enterprise console

19. Select the link BusinessObjects Enterprise XI and enter Administrator (no password) to confirm that you can log in.

## Task 11-3-10: Installing BusinessObjects Enterprise XI on UNIX or Linux

To install BusinessObjects Enterprise XI on UNIX or Linux do the following:

---

**Note.** You can perform this installation from the server console or with X Windows terminal emulation software such as Cygwin. Telnet and ssh clients, such as putty, will not allow you to install the software properly.

---



---

**Note.** Since BusinessObjects Enterprise XI is a 32-bit application, either your database client should be a 32-bit client, or all environment variables for your database client should point to 32-bit libraries (such as LIBPATH, LD\_LIBRARY\_PATH, PATH, CLASSPATH).

---

1. Insert the BusinessObjects Enterprise XI CD into the server machine's CD-ROM drive and run the setup program, install, from the root of the drive.
2. The install program checks for all required components and displays the missing ones.

```

```

```
SunOS: Your system is missing required components:
```

```

```

```
Missing package: SUNWeu8os (American English/UTF-8 L10N For OS Environment User⇒
Files)
```

```
Missing package: SUNWeuluf (UTF-8 L10N For Language Environment User Files)
```

```
If you continue your installation may not work correctly.
Please press Enter to continue...
```

Ensure all missing components are installed before proceeding.

---

**Note.** If you encounter an error like this: "Error: "Your shmmax size is 4294967295 ... shmmax size must be at least 512k", ensure that bash (bourne again shell) is installed, and run the install script under bash like this: <full path to bash> ./install.sh

---

3. Select the language that you want to install.

```
BusinessObjects Enterprise XI Setup
Please select the current language for the installation
1 - Dutch
2 - English
3 - French
4 - German
5 - Italian
6 - Japanese
7 - Korean
8 - Simplified Chinese
9 - Spanish
10 - Traditional Chinese
```

4. Select New Installation.
5. Read and accept the license agreement.
6. At the Installation Directory prompt, enter your own path for the installation directory, or press Enter to accept the default one, which is your current directory.
7. Choose User Install at the Install Option prompt.
8. Select New for the Installation Type.
9. The next page prompts you to choose between using an existing database as CMS repository, or installing MySQL as the default repository. Select Use an existing database and press Enter.

---

**Note.** MySQL is not supported in the PeopleSoft integration with BusinessObjects Enterprise XI.

---

10. Choose the type of database (Oracle, DB2 or Sybase) from the list and press Enter.  
If prompted, provide the location and connection information for the database, and press Enter.  
If prompted "Overwrite existing configuration?", reply Y.  
If prompted "Re-initialize database?", reply Y.
11. Select Use an existing Java application server and press Enter.  
You will need to configure your web application server after the installation is complete.
12. The final page of the setup program displays the installation directory. Press Enter to complete the installation.

```
BusinessObjects Enterprise XI Setup
```

```
Operation CompletePress [Enter] to go to the⇒
next screen
```

```
Business Objects products have been successfully installed :
```

```
/ds2/home/bobje/install
```

Please read installation guide for information on how to manually configure⇒  
your java application server

13. You must manually set the following environment variables after BusinessObjects Enterprise XI is installed. Then run `env.sh`, so that the updated environment variables take effect

```
export CLASSPATH=$CLASSPATH:/$bobje_home/bobje/enterprise115/java/applications⇒
/cewcanative.jar
```

```
export PATH= /$bobje_home /bobje/enterprise115/solaris_sparc:$PATH
```

```
cd /$bobje_home /bobje/setup
. ./env.sh
```

---

**Important!** If these system variables are not set, the deployment of BusinessObjects Enterprise XI web applications will fail as they are dependent on these environment settings.

---

The `ccm.sh` script provides you with a command-line interface to the various BusinessObjects Enterprise XI server components. The installation setup program starts and enables servers automatically. The following information is included for reference.

| Action                                                               | Command                                                                                               |
|----------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| Go to bobje directory that was created by the installation           | <code>cd &lt;BOE_DIR&gt;/bobje</code><br><b>Note.</b> The commands below are run from this directory. |
| Start all BusinessObjects Enterprise XI servers as daemons           | <code>./ccm.sh --start all</code>                                                                     |
| Enable all BusinessObjects Enterprise XI servers using default ports | <code>./ccm.sh --enable all</code>                                                                    |
| Stop all BusinessObjects Enterprise XI servers                       | <code>./ccm.sh --stop all</code>                                                                      |
| View the help on <code>ccm.sh</code>                                 | <code>./ccm.sh --help   more</code>                                                                   |

This completes the installation of BusinessObjects Enterprise XI on UNIX or Linux.

## Task 11-3-11: Installing BusinessObjects Integration Kit for PeopleSoft on Unix

On the machine where Business Objects Enterprise installed,

1. Mount the Business Objects Integration Kit for PeopleSoft CD:
2. Run `./install.sh` from: `/cd/<platform>/DISK_1`
3. Select the language in which you want to performance the installation
4. Select 1 - PeopleSoft Enterprise for PeopleTools version 8.46 environment; BusinessObjects XI Release 2 Integration Kit for PeopleSoft - New installation. Please select a functional domain:

- PeopleSoft Enterprise for PeopleTools version 8.46 environment
  - PeopleSoft Enterprise for PeopleTools versions 8.17 to 8.45 environment
  - PeopleSoft EPM environment
  - JD Edwards EnterpriseOne
5. Accept the license agreement
  6. Specify the directory where BusinessObjects Enterprise is installed. (For example: `/ds2/home/bobjer2/bobjer2`) and press Enter.

---

**Note.** For AIX, the JVM directory is `$JREDIR/jre/bin/j9vm` and the libjava directory is `$JREDIR/jre/bin`. The example given below is for Linux. For Solaris, the JVM directory is `bobje_home/bobje/jdk/jre/lib/sparc/server` and the libjava directory is `bobje_home/bobje/jdk/jre/lib/sparc`. For HP UNIX, the JVM directory is `bobje_home/bobje/jdk/jre/lib/PA_RISC/server` and the libjava directory is `bobje_home/bobje/jdk/jre/lib/PA_RISC`.

---

7. Entering JVM directory: `bobje_home/bobje/jdk/jre/lib/i386/server`
8. Entering libjava directory: `bobje_home/bobje/jdk/jre/lib/i386`
9. Press Enter to start new installation
10. The final screen displays the installation directory. Press Enter to finish the install.

---

**Note.** The default install location is: `<bobje_home>/bobje/enterprise115/<platform>/peoplesoft/11.5`

---

## Task 11-3-12: Installing PeopleSoft BusinessObjects Enterprise XI Integration on UNIX or Linux

This task installs four web application files:

- psadmin.war
- psdesktop.war
- psadhoc.war
- pswebcompadapter.war

To install BusinessObjects Enterprise XI Integration in console mode:

---

**Note.** The console mode installation is typically used on UNIX platforms.

---

1. Enter the following commands, where `<PS_HOME>` is the main PeopleSoft directory, and `<OS>` is the UNIX operating system:

---

**Note.** The notation at the beginning of the second line is “dot-space-dot,” not “dot-dot.”

---

```
cd <PS_HOME>
. ./psconfig.sh
cd setup/PsMpCrystalInstall
setup.<OS> -console
```

See “Using the PeopleSoft Installer,” Starting the PeopleSoft Installer.

You see the following message:



```
Welcome to the InstallShield Wizard for Integration Kit for PeopleSoft⇒
Enterprise 11.5
```

```
The InstallShield Wizard will install Integration Kit for PeopleSoft Enterprise⇒
11.5 on your computer.
To continue, choose Next.
```

```
Integration Kit for PeopleSoft Enterprise 11.5
Oracle
http://www.oracle.com
Press 1 for Next, 3 to Cancel or 5 to Redisplay [1]
```

2. Enter */* for Next to continue.
3. At the prompt:

```
Please enter the Crystal Enterprise installation directory [/opt/bobje/dsl/ps⇒
/dssgrp/boe/boe]
Press 1 for Next, 2 for Previous, 3 to Cancel or 5 to Redisplay [1]
```

Enter the directory where BusinessObjects Enterprise is installed and then enter */*.

4. At the prompt:

```
Integration Kit for PeopleSoft Enterprise 11.5 Install Location
```

Please specify a directory or press Enter to accept the default directory.

```
Directory Name: [/dsl/ps/dssgrp/boe/boe/peoplesoft]
```

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

Accept the default location for the BusinessObjects Enterprise Integration installation by pressing ENTER, or enter a new location, then enter */* to continue.

5. At the prompt, choose the Typical setup type:

Choose the setup type that best suits your needs.

```
[X] 1 - Typical
 The program will be installed with the suggested configuration.
 Recommended for most users.
[] 2 - Custom
 The program will be installed with the features you choose.
 Recommended for advanced users.
```

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

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

Press ENTER twice to accept the default, Typical installation, and continue.

6. Confirm that the installation summary is correct:

```
Integration Kit for PeopleSoft Enterprise 11.5 will be installed in
```

the following location:

```
/dsl/ps/dssgrp/boe/boe/peoplesoft
```

with the following features:

```
Native Drivers
Security Plug-in (Server Side)
```

for a total size:

```
331.8 MB
```

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

Enter 1 to continue and begin the installation.

7. You see a message showing the progress of the installation.
8. When the installation is complete, you see the following message:

```
The InstallShield Wizard has successfully installed Integration Kit for People⇒
Soft Enterprise 11.5. Choose Finish to exit the wizard.
```

```
Press 3 to Finish or 5 to Redisplay [3]
```

Enter 3 to finish and exit the installation.

## Task 11-3-13: Installing TrueType Fonts in UNIX or Linux

To install a custom TrueType supported font in Enterprise XI on supported UNIX and Linux platforms, copy the font to the following directory

```
install_dir/bobje/enterprise115/<platform>/crpe/fonts
```

Depending on the operating system, substitute *<platform>* with the appropriate value from the following list:

- solaris\_sparc (Solaris)
- aix\_rs6000 (AIX)
- hpux\_pa-risc (HP-UNIX)
- linux\_x86 (Linux)

Please keep the following points in mind while working with special fonts in UNIX or Linux:

- The Japanese version of Enterprise XI Release 2 for UNIX does not support True Type Collection (TTC) fonts. However, you can split your TTC fonts into two or three TTF fonts using a font conversion tool (such as FontLab). Alternatively, your font vendor may be able to provide TTF versions of your required fonts.
- To refer to a font name in its native language, the 'mainwin' locale must be set to that language. For example, to refer to a Japanese font by its Japanese name, the locale must be set to Japanese.
- Too many installed fonts may cause slow performance. To improve performance, delete unused fonts from your /crpe/fonts directory.

- If a font or font size contained in a report cannot be found on the system where the report processing is occurring (that is, the server with Crpe32.dll installed), the processing engine will attempt to approximate the font in the generated output.

For more information on the use of supported fonts in Crystal Reports and Enterprise search for knowledge base article c2011820 on our support site:

See <http://support.businessobjects.com/search> (<http://support.businessobjects.com/search>)

## Task 11-3-14: Installing Special Fonts in UNIX or Linux

To install special fonts, copy the font from the <PS\_HOME>/FONTS/Truetype folder to the install\_dir/bobje/enterprise115/<platform>/crpe/fonts folder in your BOE machine. Depending on the operating system, substitute <platform> with the appropriate value from the following list.

- solaris\_sparc (Solaris)
- aix\_rs6000 (AIX)
- hpux\_pa-risc (HP-UNIX)
- linux\_x86 (Linux)

## Task 11-3-15: Installing Patches Required at Installation

There may be patches for BusinessObjects Enterprise XI as well as the PeopleSoft Integration for BusinessObjects Enterprise XI that must be installed at installation.

Log onto Customer Connection to check using the Required for Install or Upgrade search page. You can search using the following criteria:

|                     |                                               |
|---------------------|-----------------------------------------------|
| <b>Product Line</b> | PeopleTools                                   |
| <b>Product</b>      | PeopleTools                                   |
| <b>Release</b>      | the release of PeopleTools that you are using |

## Task 11-3-16: Creating a Web Server for BusinessObjects Enterprise on UNIX or Linux

This section discusses:

- Creating an Oracle Application Server on UNIX or Linux
- Deploying the BusinessObjects Enterprise XI Launchpad Applications for OAS on UNIX or Linux
- Creating a WebLogic Server on UNIX
- Deploying the BusinessObjects Enterprise XI Launchpad Applications for WebLogic on UNIX or Linux
- Creating a WebSphere Server on UNIX or Linux
- Deploying the BusinessObjects Enterprise XI Launchpad Applications on WebSphere

### Creating an Oracle Application Server on UNIX or Linux

Before beginning this procedure you must have installed OAS on the server where BusinessObjects Enterprise XI is installed. You must use the same user account to install OAS and BusinessObjects Enterprise XI.

To create an Oracle Application Server on UNIX or Linux:

1. Change the deployment values for the Java WCA, if you are using Oracle 10g server.
  - a. Stop the java application server if it is running.

---

**Note.** To stop OAS, use the command `<OAS_HOME>/opmn/bin/opmnctl stopall`.

---

- b. Extract web.xml from pswebcomadapter.war with the following command:

```
jar -xf pswebcomadapter.war WEB-INF/web.xml
```

The default location for pswebcomadapter.war is `$bobje_home/bobje/enterprise115/java/applications`.

- c. Open web.xml with a text editor.
  - d. Change “false” to “true” in the following entry:

```
<!-- if you are using oracle10g, turn this flag to true -->
<context-param>
 <param-name>was.oracle</param-name>
 <param-value>false</param-value>
 <description>Reserved.</description>
</context-param>
```

- e. Save web.xml and reinsert it into WEB-INF in pswebcomadapter.war.

To reinsert the updated web.xml, use the following command:

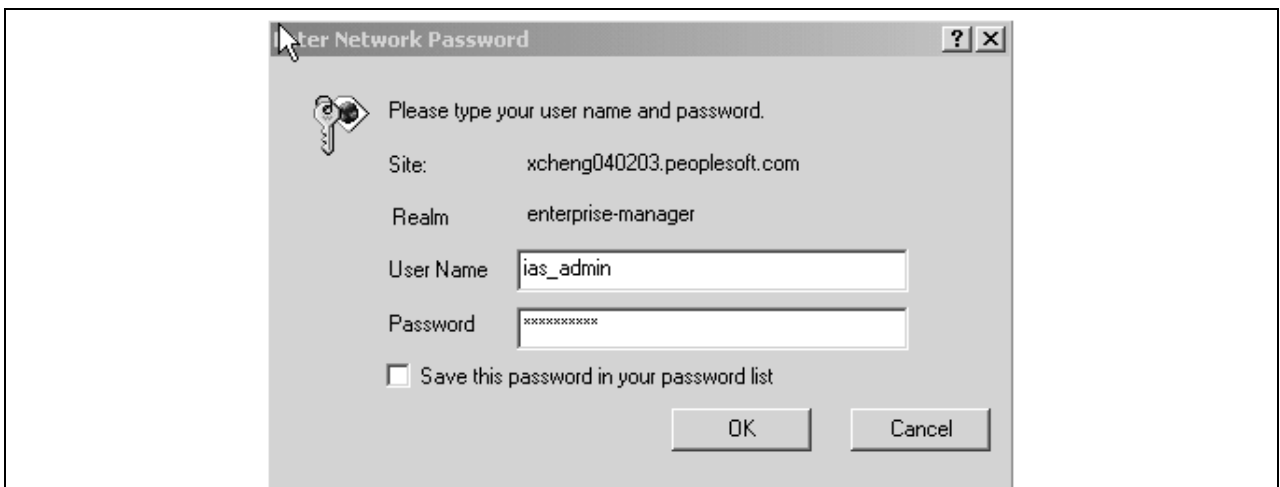
```
jar -uf pswebcomadapter.war WEB-INF/web.xml
```

2. Open a browser window and enter the following URL to verify that the OAS server is running correctly:

`http://<machine_name>:<port>`

where `<machine_name>` is the name of the machine on which OAS is installed and `<port>` is the OAS port number (1810 is the default).

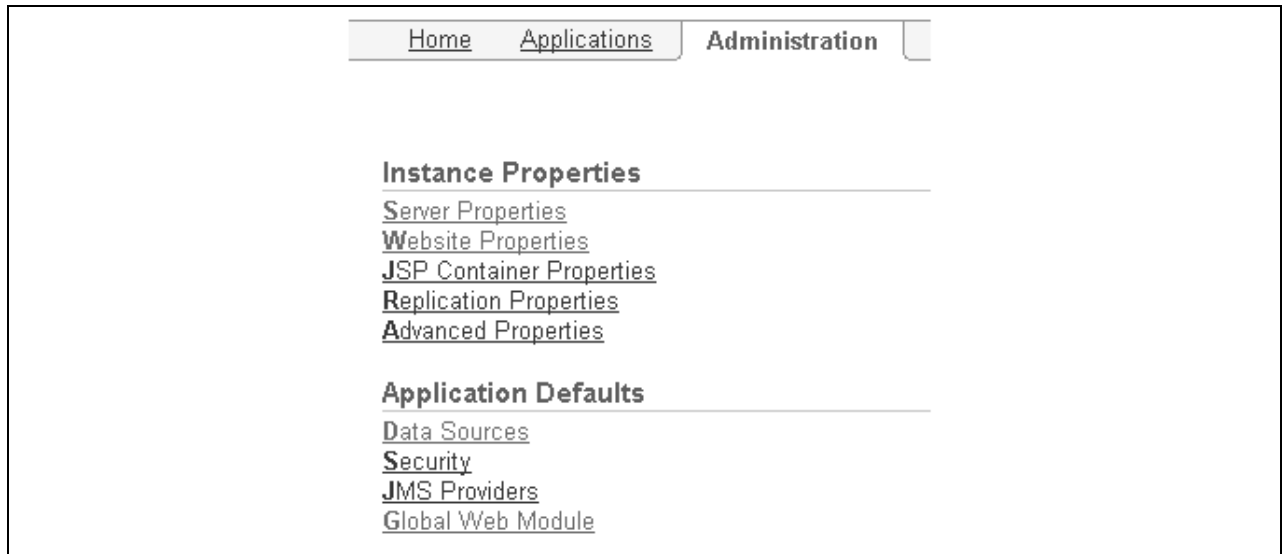
Enter the administrator user name (ias\_admin is the default) and the password that was set during the installation.



OAS login dialog box

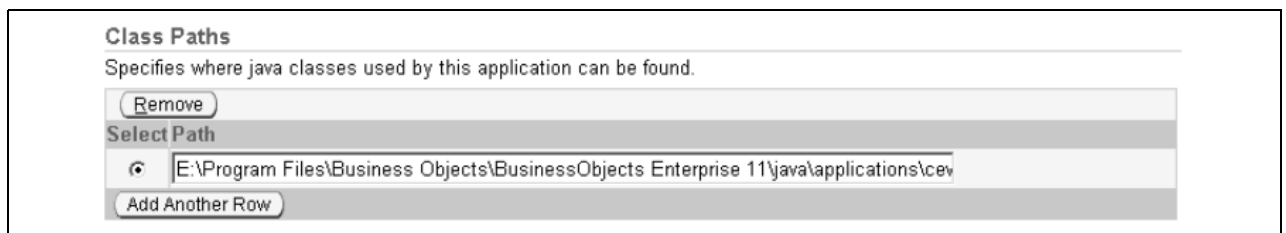
3. Click on the Start button to launch the server “home”:

4. Click OK after you receive a message that the server has been started.
5. Select the Administration tab.



Administration tab

6. Configure the class path:



Class Paths page

- a. Click Global Web Module.
- b. Click the General link under Properties.
- c. Click Add Another Row in the Class Paths section.
- d. Enter the full path, including the filename, for the `cewcanative.jar` file in the path field.  
For example, `$bobje_home/bobje/enterprise115/java/applications/cewcanative.jar`, where `$bobje_home` is the directory where you installed BusinessObjects Enterprise XI.
7. Click the Apply button at the bottom of the page, and click OK.
8. On the Administration tab, click the Server Properties link.
9. In the Environment Variables section, click the Add Environment Variable button.
10. To configure the PATH:

| Environment Variables                 |                                    |                                     |
|---------------------------------------|------------------------------------|-------------------------------------|
| <div>Remove</div>                     |                                    |                                     |
| Select Name                           | Value                              | Append                              |
| <input checked="" type="radio"/> PATH | E:\Program Files\Business Objects\ | <input checked="" type="checkbox"/> |
| <div>Add Environment Variable</div>   |                                    |                                     |

Environment Variables page

- a. Enter *PATH* in the Name field.
- b. Enter the absolute path to the BusinessObjects Enterprise XI win32\_86 directory in the Value field.  
If you have not changed the default directory for Business Objects, the setting for this field would be "\$bobje\_home/bobje/enterprise115/<OS>". If the default path was changed for your installation of BusinessObjects Enterprise XI, modify the path accordingly.
- c. Select the Append check box.
- d. Click Apply.
- e. Click No when you receive the message that the application server must be restarted before the changes take affect. You can restart the server later.

11. On the Administration tab, click the Server Properties link.

12. To change the memory allocation:

| Command Line Options |                                                                 |
|----------------------|-----------------------------------------------------------------|
| Java Executable      |                                                                 |
| QC4J Options         |                                                                 |
| Java Options         | /config/java2.policy -Djava.awt.headless=true -Xms128m -Xmx512m |

Command Line Options page

- a. In the Java Options box, add a space, then append *-Xms128m -Xmx512m* to the existing entry.
- b. Click Apply.
- c. Click Yes when you receive the message that the application server must be restarted before the changes take affect.

## Deploying the BusinessObjects Enterprise XI Launchpad Applications for OAS on UNIX or Linux

To deploy the Launchpad applications for OAS on UNIX or Linux:

1. Run the following commands from the UNIX console. <BOE\_DIR> is the directory where you installed BusinessObjects Enterprise XI

```
Dcmtl deployapplication -a psdesktop -f
"<BOE_DIR>/bobje/installation/bobje/enterprise115/java/applications=>
/psdesktop.war" -rc
/businessobjects/enterprise11/desktoplaunch
Dcmtl deployapplication -a pswebcomadapter -f
"<BOE_DIR>/bobje/installation/bobje/enterprise115/java/applications=>
/pswebcomadapter.war" -
rc /businessobjects
Dcmtl deployapplication -a jsfadmin -f
```

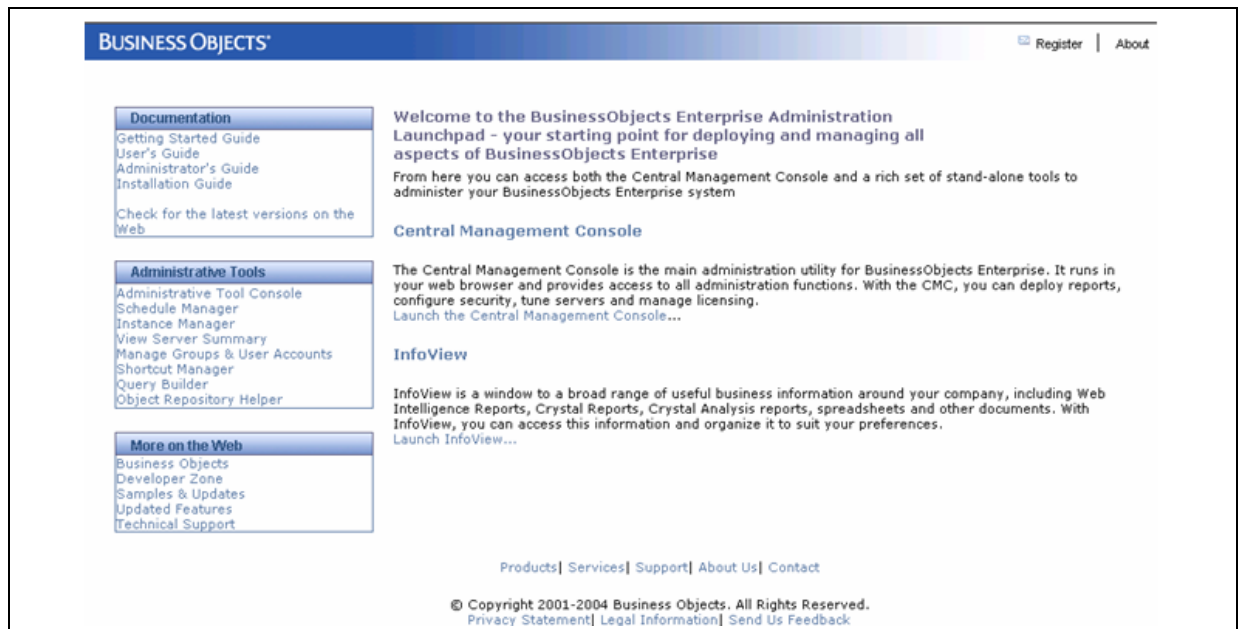
```
"<BOE_DIR>/bobje/installation/bobje/enterprise115/java/applications⇒
/jsfadmin.war" -rc
/jsfadmin
Dcmtl deployapplication -a psadmin -f
"<BOE_DIR>/bobje/installation/bobje/enterprise115/java/applications⇒
/psadmin.war" -rc
/businessobjects/enterprise11/adminlaunch
Dcmtl deployapplication -a psadhoc -f
"<BOE_DIR>/bobje/installation/bobje/enterprise115/java/applications⇒
/psadhoc.war" -rc /psadhoc
```

2. To verify the OAS configuration:

- a. Open a new browser window.
- b. Enter the following URL:

`http://<machine_name>:<port>/businessobjects/enterprise115/adminlaunch`

For <machine\_name> and <port> substitute the name of your machine and port.



BusinessObjects Enterprise XI Admin Launchpad window

- c. Click Central Management Console and log on as administrator (no password) to confirm that you can log in.

## Creating a WebLogic Server on UNIX

To create a WebLogic Server on UNIX:

1. Start the Configuration Wizard by running `config.sh` from `$Weblogic_home/weblogic92/common/bin` directory.
2. Choose "Create a new Weblogic domain" and press Enter.
3. Select "Choose Weblogic Platform components" and press Enter.
4. In the "Application Template Selection" window press Enter.

5. In the “Configure Administrator User name and Password” window, type the password and confirm it.
6. In the “Domain Mode Configuration” window, choose “Development Mode” and press Enter.
7. Select the SDK and press Enter.

---

**Note.** BOE XI only supports JDK1.5\_x with WebLogic 9.2.

---

8. Accept all the default settings until you reach the “Edit Domain Information” window.
9. In the “Edit Domain Window” replace “base\_domain” with a meaningful domain name, like “BOEXI” and press Enter.
10. A domain is created at the default port 7001 if you see the following message

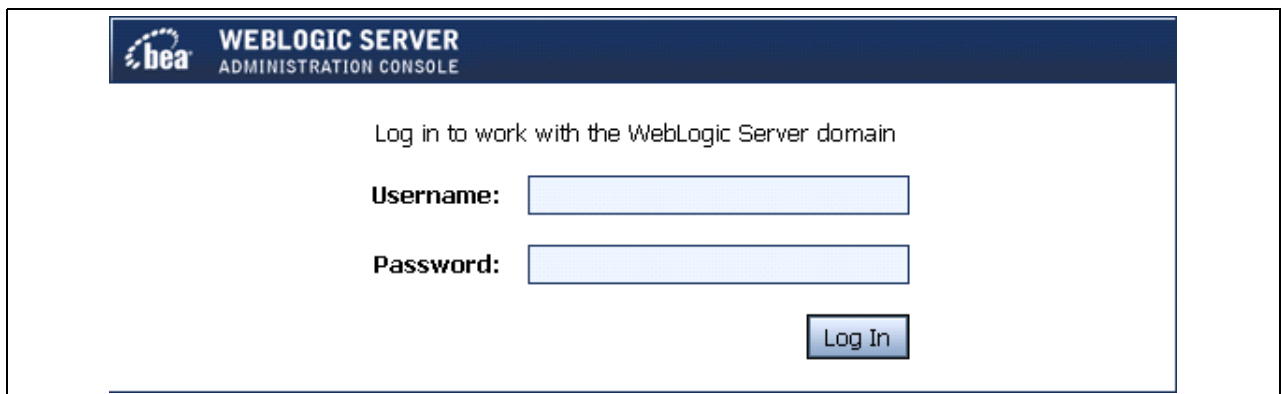
```

<----- BEA WebLogic Configuration Wizard----->
Creating Domain...
0% 25% 50% 75% 100%
[-----|-----|-----|-----]
[*****]
**** Domain Created Successfully! ****

```

Creating a Domain

11. Start the web server by running `startWebLogic.sh` from `/$Weblogic_home$/user_projects/domains/<mydomain>`.  
Wait until a message containing “Server started in RUNNING mode” appears.
12. Enter the URL: `http://<machinename>:7001/console`. Confirm in a browser to confirm that you are able to log in to the web server.
13. At the login page, enter the username and password. Example: `weblogic / password`. Then click the Log In button. If you are able to log in then it verifies that your WebLogic Server is setup.



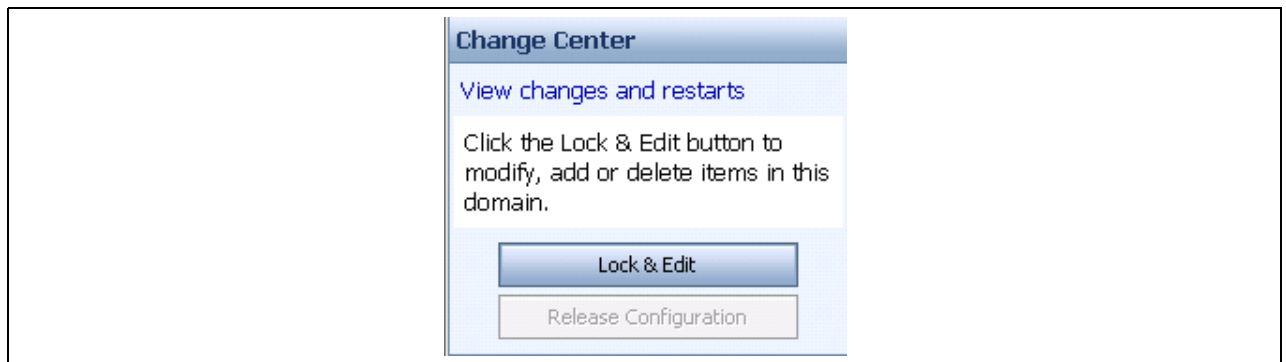
The WebLogic Server Administration Console

## Deploying the BusinessObjects Enterprise XI Launchpad Applications for WebLogic on UNIX or Linux

To deploy the BusinessObjects Enterprise XI Launchpad applications:



1. In the Change Center of the Administration Console, click Lock & Edit.



Change Center of the Administration Console

2. In the left pane of the Console, click the XML Registries entry.



Selecting the XML Registries option

3. In the right pane, click on New button.



Creating a New XML Registry

4. Enter the following:

**Name:**

BusinessObjects Enterprise Infoview

**Document Builder Factory:**

weblogic.apache.xerces.jaxp.DocumentBuilderFactoryImpl

**SAX Parser Factory:**

weblogic.apache.xerces.jaxp.SAXParserFactoryImpl

**Transformer Factory:**

weblogic.apache.xalan.processor.TransformerFactoryImpl

**Create a New XML Registry**

Back Next Finish Cancel

**XML Registry Properties**  
The following properties will be used to identify your new XML Registry.

What would you like to name your new new XML Registry?

**Name:** BusinessObjects Enterprise Infoview

What is the fully qualified name of the class that implements the javax.xml.parsers.DocumentBuilderFactory interface for this XML Registry?

**Document Builder Factory:** weblogic.apache.xerces.jaxp.DocumentBuilderFactoryImpl

What is the fully qualified name of the class that implements the javax.xml.parsers.SaxParserFactory interface for this XML Registry?

**SAX Parser Factory:** weblogic.apache.xerces.jaxp.SAXParserFactoryImpl

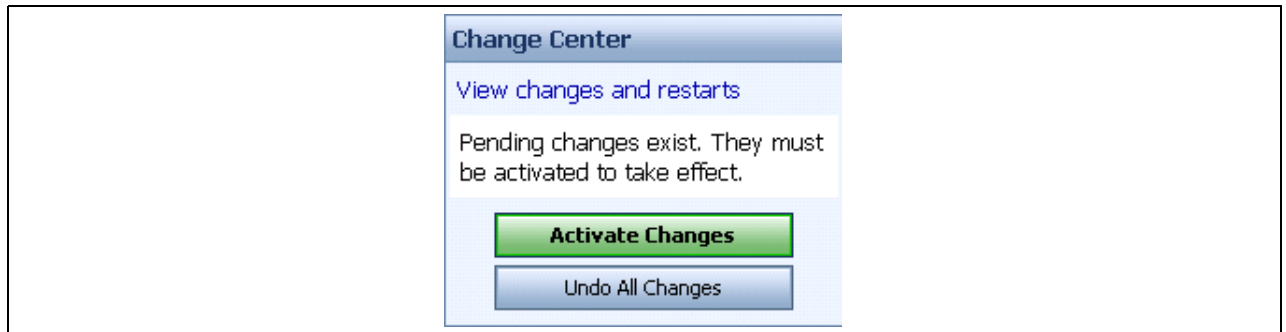
What is the fully qualified name of the class that implements the javax.xml.transform.TransformerFactory interface for this XML Registry?

**Transformer Factory:** weblogic.apache.xerces.xalan.processor.TransformerFactoryImpl

Back Next Finish Cancel

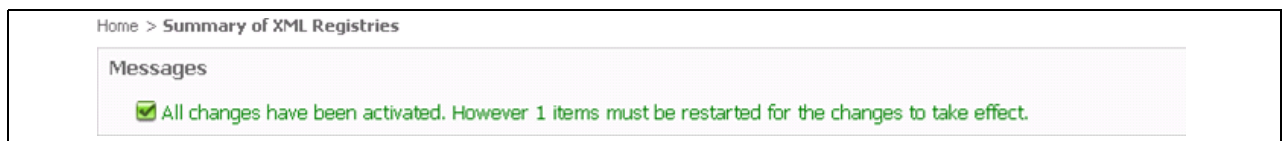
Creating a New XML Registry

5. Click Next and select the server to apply the change to (that is, either the Admin Server by default or the appropriate managed server).
6. Click Finish, and then click “Activate Changes” for the changes to take effect.



The Activate Changes option

You must restart the web server as well to effect certain configuration changes such as new XML Registry entries. The Administration console lets you know in the “Messages” pane if you need to restart the WebLogic server.



The Messages Pane

7. Configure CLASSPATH, PATH and JAVA\_OPTIONS and restart WebLogic server.

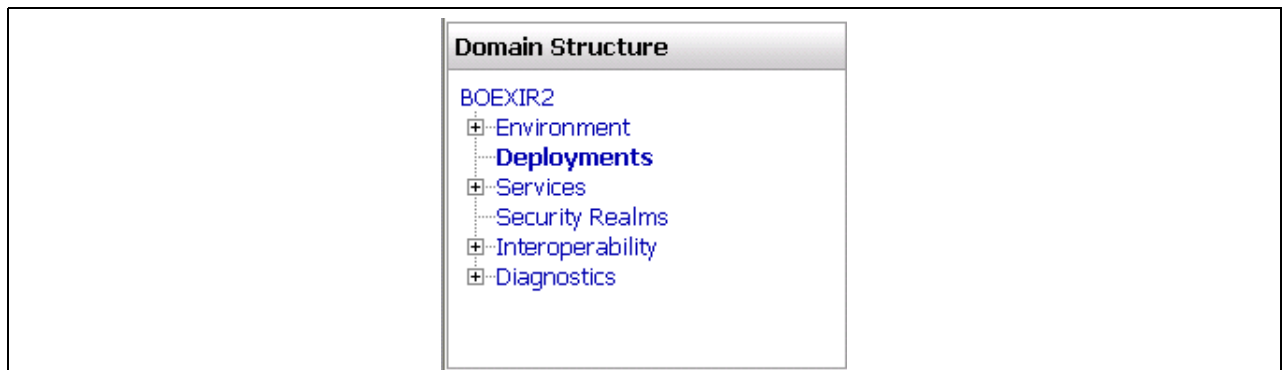
**Note.** You must add these to startWebLogic.sh even if these are already configured as system environment variables.

Open startWebLogic.sh in the <bea\_home>/user\_projects/domains/ <domain folder>/bin folder.

```
export CLASSPATH=$bobje_home/bobje/enterprise115/java/applications⇒
/cevcanative.jar:$CLASSPATH
export CLASSPATH==$bobje_home/bobje/enterprise115/java/xalan.jar:$CLASSPATH
export PATH==$bobje_home/bobje/enterprise115/<OS_SPECIFICPATH>:$PATH
export JAVE_OPTIONS=$JAVA_OPTIONS -XX:PermSize=48m -XX:MaxPermSize=128m
```

**Note.** xalan.jar path is different in some UNIX flavors. Please do a search from BOE home directory in order to find the correct path.

8. Click Deployments on the Domain Structure panel.



Selecting Deployments in the Domain Structure Panel

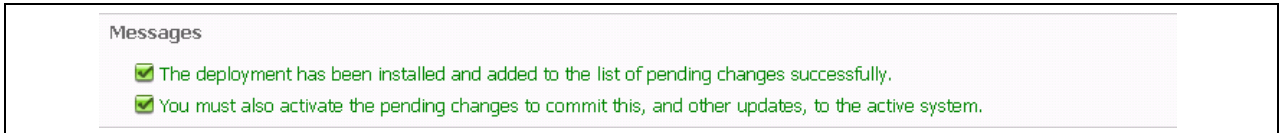
9. Click the install button and navigate to

bobje\_home/bobje/enterprise115/java/applications

Choose the `pswebcompadapter.war` radio button and click Next.

10. Select “Install This Deployment as an Application” as the target style and click Next.

11. Accept all the default values and click Finish. Wait until the status shows Success.



#### Success Messages

12. In the Change Center of the Administration console, click Activate Changes, to activate these changes.

---

**Note.** This operation might take a while as BEA stages the web application, validates and so on, which take longer than in WebLogic 8.1.x. However at runtime the performance is a lot better.

---

13. Repeat steps 8 through 12 to deploy the `jsfadmin.war` application. However in Step 9, select `jsfadmin.war` instead of `pswebcompadapter.war`

14. Repeat steps 8 through 12 to deploy the `psadmin.war` application. However in Step 9, select `psadmin.war` instead of `pswebcompadapter.war`. This deploys the User launchpad application.

15. Repeat steps 8 through 12 to deploy the `psdesktop.war` application. However in Step 9, select `psdesktop.war` instead of `pswebcompadapter.war`

16. Repeat steps 8 through 12 to deploy the `psadhoc.war` application. However in Step 9, select `psadhoc.war` instead of `pswebcompadapter.war`. This deploys the Crystal Reports Explorer application.

17. Update the “Deployment Order” for CMC related applications as follows and click Save:

Home > Summary of Deployments > **pswebcompadapter**

### Settings for pswebcompadapter

Overview **Deployment Plan** Configuration Security Targets Control Testing Monitoring Notes

[Save](#)

Use this page to view the installed configuration of a Web Application.

|                                                                                                            |                                                                                  |                                                                                                                                                                     |
|------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name:</b>                                                                                               | pswebcompadapter                                                                 | The name of this application deployment. <a href="#">More Info...</a>                                                                                               |
| <b>Context Root:</b>                                                                                       | (No value specified)                                                             | The specific path at which this web application is deployed. <a href="#">More Info...</a>                                                                           |
| <b>Path:</b>                                                                                               | /ds1/home/bobjer2/bobje/enterprise115<br>/java/applications/pswebcompadapter.war | The path to the source of the deployable unit on the Administration Server. <a href="#">More Info...</a>                                                            |
| <b>Deployment Plan:</b>                                                                                    | (no plan specified)                                                              | The path to the deployment plan document on the Administration Server. <a href="#">More Info...</a>                                                                 |
| <b>Staging Mode:</b>                                                                                       | (not specified)                                                                  | The mode that specifies whether an application is staged on the Administration Server to the Main area during application preparation. <a href="#">More Info...</a> |
| <b>Security Model:</b>                                                                                     | DDOnly                                                                           | The security model specifies how this deployment is secured. <a href="#">More Info...</a>                                                                           |
|  <b>Deployment Order:</b> | <input type="text" value="10"/>                                                  | A numerical value that indicates when this unit is deployed on a server, during start-up.                                                                           |

[Save](#)

Settings for pswebcompadapter

- pswebcompadaptor.war — 10
- jsfadmin.war — 20
- psadmin.war — 30

This will make sure that the web applications start in the right order.

**Note.** psdesktop.war does not depend on any of the other war files so it can be deployed at any time. The remaining files have dependencies on each other so must be deployed in a specific order. First deploy the pswebcompadapter.war followed by jsfadmin.war and finally psadmin.war.

18. Select all war files and click Start -> Servicing all requests.

**Summary of Deployments**

Control **Monitoring**

This page displays a list of J2EE Applications and stand-alone application modules that have been installed to this domain. Installed applications and modules can be started, stopped, updated (redeployed), or deleted from the domain by first selecting the application name and using the controls on this page.

To install a new application or module for deployment to targets in this domain, click the Install button.

**Deployments**

Install Update Delete Start Stop Showing 1 - 5 of 5

| <input checked="" type="checkbox"/> | Name             | State  | Type            |
|-------------------------------------|------------------|--------|-----------------|
| <input checked="" type="checkbox"/> | jsfadmin         | Active | Web Application |
| <input checked="" type="checkbox"/> | psadhoc          | Active | Web Application |
| <input checked="" type="checkbox"/> | psadmin          | Active | Web Application |
| <input checked="" type="checkbox"/> | psdesktop        | Active | Web Application |
| <input checked="" type="checkbox"/> | pswebcompadapter | Active | Web Application |

Install Update Delete Start Stop Showing 1 - 5 of 5

Summary of Deployments

## Creating a WebSphere Server on UNIX or Linux

Before beginning this procedure, you must have installed IBM WebSphere on the server where BusinessObjects Enterprise XI is installed. You must use the same user account to install WebSphere and BusinessObjects Enterprise XI.

1. Start the WebSphere server by running the command `./startServer.sh server_name`
2. Enter this URL in a browser to invoke the WebSphere Administrative Console:  
`http://<machine_name>:9090/admin/`
3. In the WebSphere Administrative Console window, enter *admin* (or another User ID) and press OK.

**Integrated Solutions Console**

**Welcome, enter your information.**

User ID:

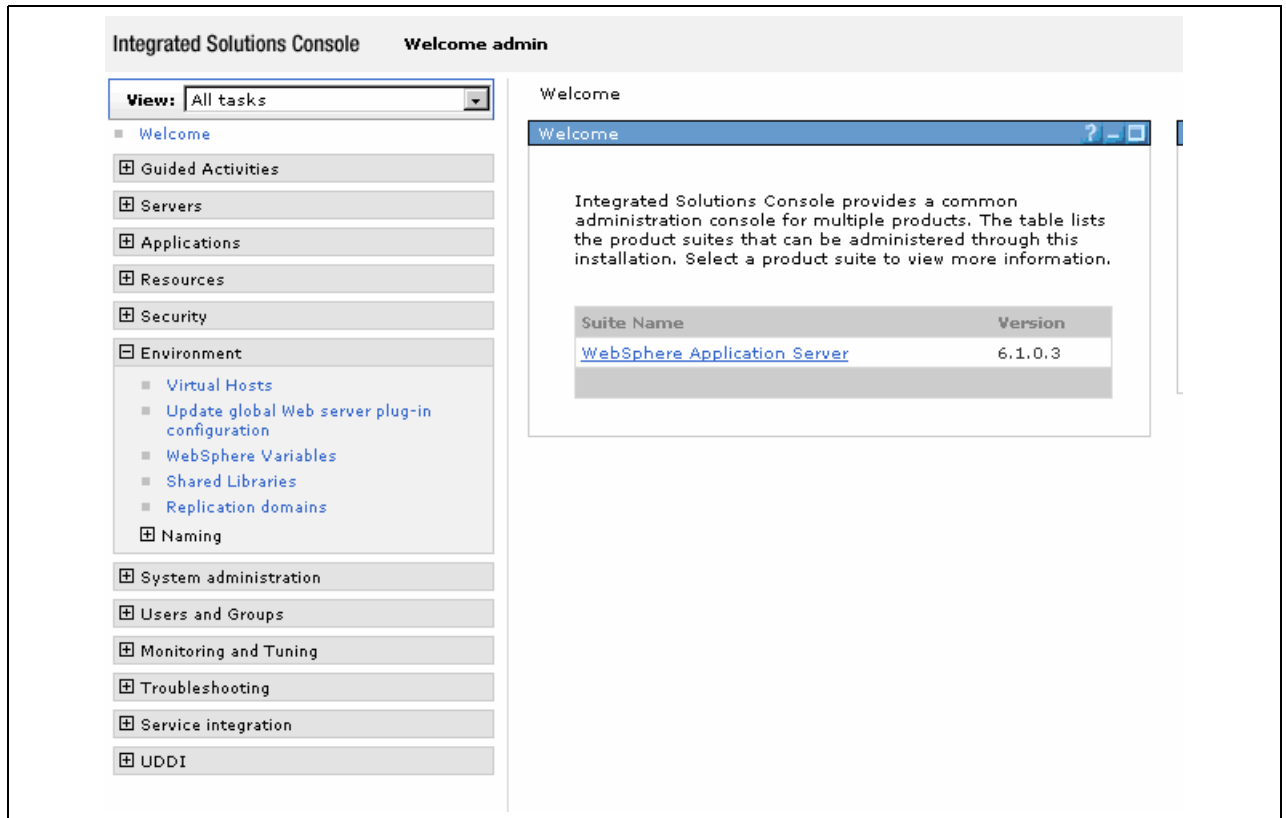
admin

Log in

Note: After some time of inactivity, the system will log you out automatically and ask you to log in again.

WebSphere Application Server login window for UNIX

4. Expand the Environment node and select the Shared Libraries link:



Selecting shared libraries for UNIX

5. Select your Server and Node from the Scope drop-down list and click New to add a new library.
6. Enter values for Name, Classpath, and Native Library Path, and click OK. The values for Classpath and Native Library Path will vary depending upon your platform.

|                            |                                                                            |
|----------------------------|----------------------------------------------------------------------------|
| <b>Name</b>                | WCA                                                                        |
| <b>Classpath</b>           | <i>\$bobje_home</i> /bobje/enterprise115/java/applications/cewcanative.jar |
| <b>Native Library Path</b> | <i>\$bobje_home</i> /bobje/enterprise115/solaris_sparc                     |

Shared Libraries

Close page

Shared Libraries > New

Use this page to define a container-wide shared library that can be used by deployed applications.

Configuration

**General Properties**

\* Scope

\* Name  
WCA

Description

\* Classpath

Native Library Path

Apply OK Reset Cancel

**Field help**  
Specifies an optional path to any native libraries (DLL or SO files) required by this shared library.

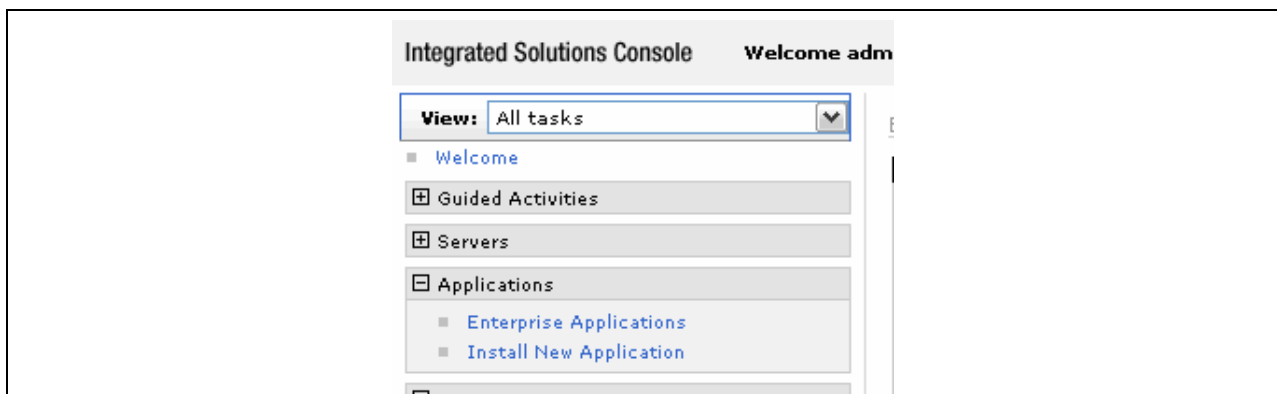
**Page help**  
[More information about this page](#)

Creating a New Shared Library

## Deploying the BusinessObjects Enterprise XI Launchpad Applications on WebSphere

This task assumes that you have logged into the WebSphere Administrative Console as described in the previous section.

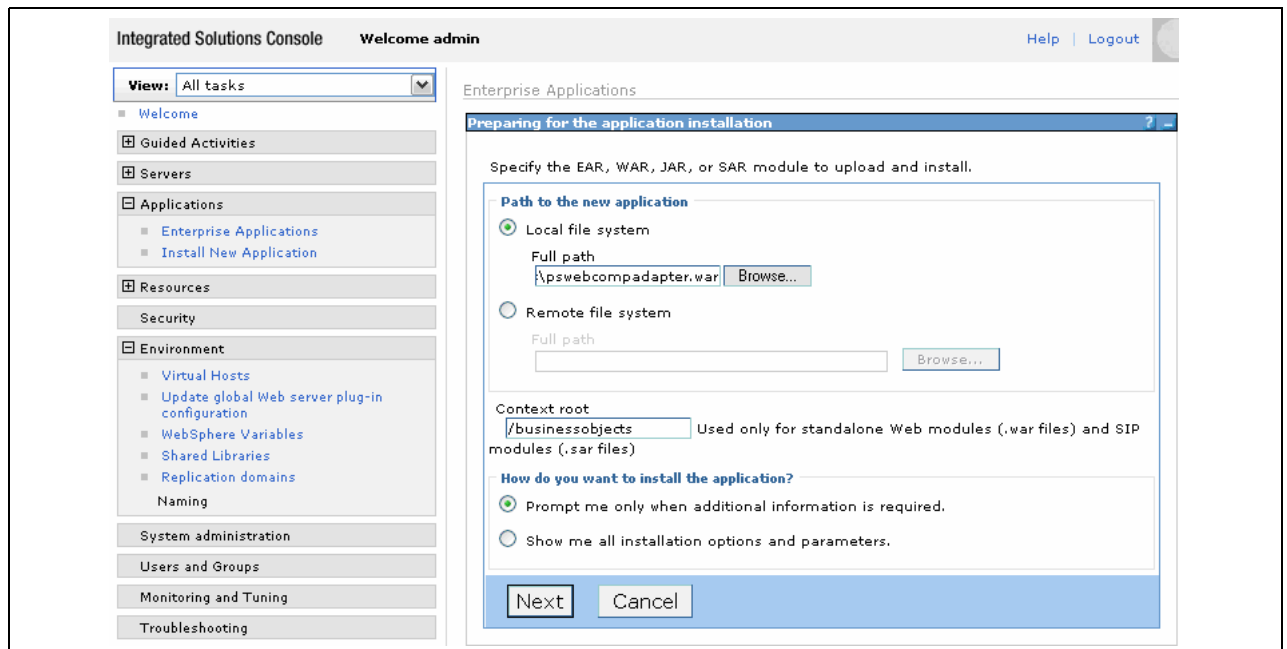
1. From the menu on the left, select Applications, Install New Applications.



WebSphere Administrative Console

2. Specify the war file to install:  
\$bobje\_home/bobje/enterprise115/java/applications/pswebcompadapter.war
3. Enter */businessobjects* in the Context Toot area, and click Next.



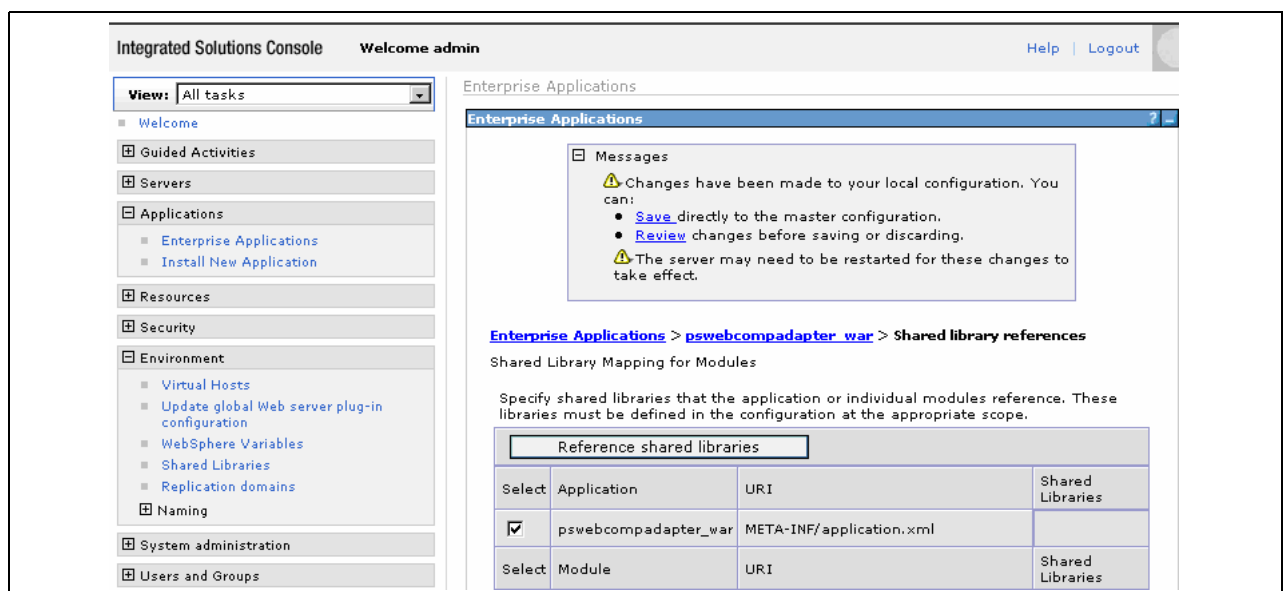


Preparing for the application installation for pswebcompadapter.war

4. Accept all defaults on the next several windows and continue until you see a window with a Finish button.
5. Click the Finish button.

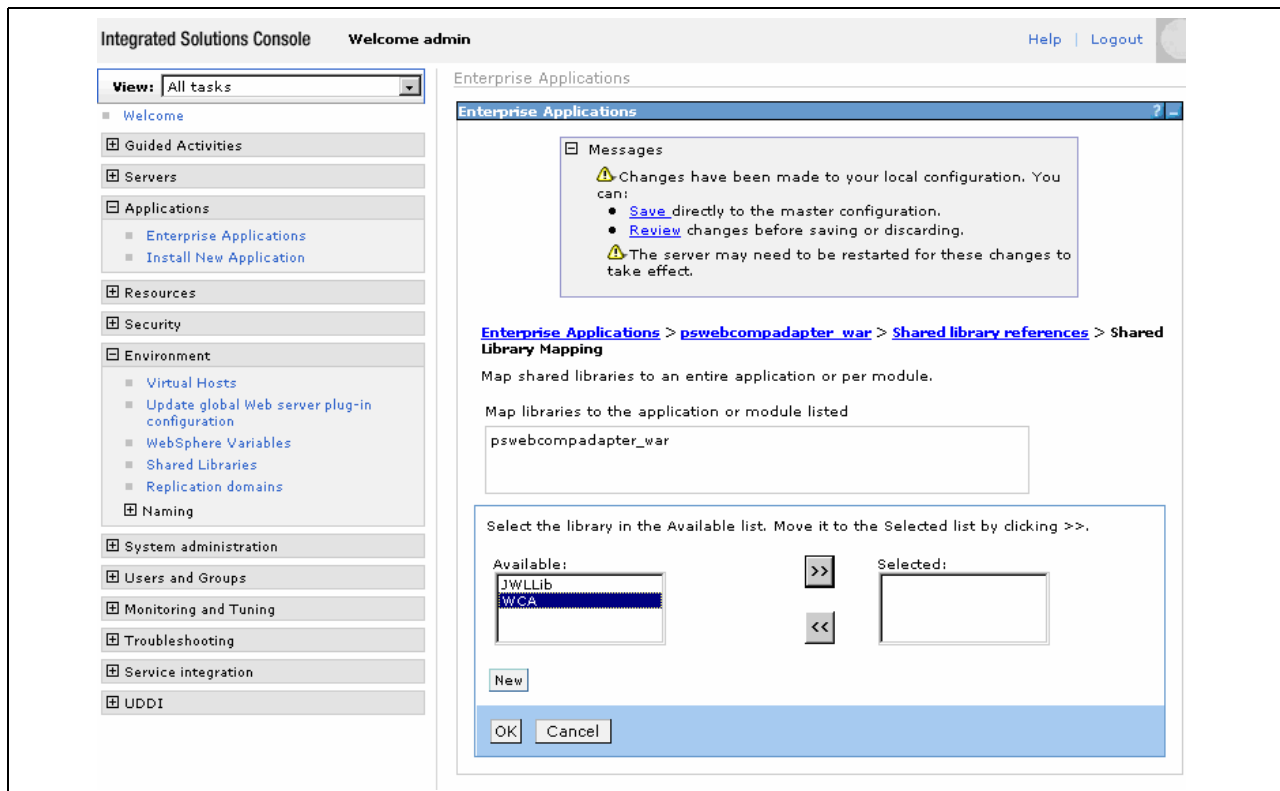
A confirmation window appears with a message similar to the following: “Application pswebcompadapter\_war installed successfully.”

6. Select Manage Applications to see the list of applications.
7. Select the link pswebcompadapter\_war to open its configuration page.
8. Near the bottom of the window, click the shared library references link and select pswebcompadapter\_war.

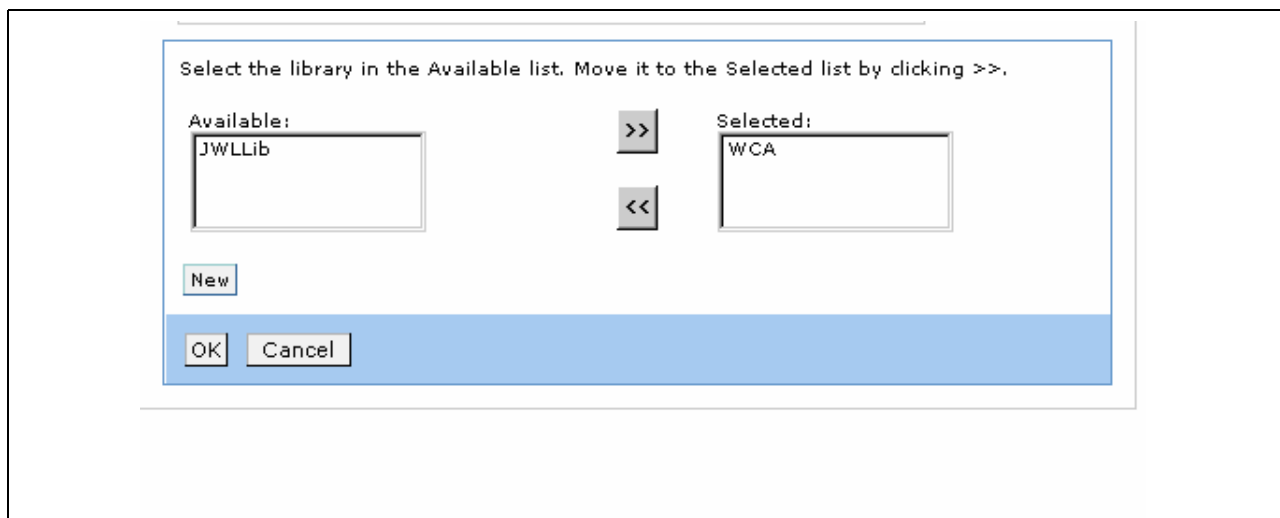


Shared Library References

9. Click on the button Reference shared libraries. Select WCA and click on the Right Arrow.



Selecting WCA from the Available List of libraries



Moving WCA to the Selected List of libraries

10. Click OK to save it.

11. Repeat steps 2 through 9, but use these parameters:

**File** `$bobje_home/bobje/enterprise115/java/applications/psadmin.war`

**Context Root** `/businessobjects/enterprise115/adminlaunch`

12. Repeat steps 2 through 9 with these parameters:

**File** `$bobje_home/bobje/enterprise115/java/applications/psdesktop.war`

- Context Root**                                `/businessobjects/enterprise115/desktoplaunch`
13. Repeat steps 2 through 9 with these parameters:
- File**                                        `$bobje_home/bobje/enterprise115/java/applications/psadhoc.war`
- Context Root**                                `/adhoc`
14. Repeat steps 2 through 9 with these parameters:
- File**                                        `$bobje_home/bobje/enterprise115/java/applications/jsfadmin.war`
- Context Root**                                `/jsfadmin`
15. Select the Save link to permanently save all changes.
16. Stop and start the WebSphere server.

## Task 11-3-17: Confirming Access to the BusinessObjects Enterprise XI Administration and User Launchpad Applications

After you have completed the installations, you should confirm that you can access the administration console and User Launchpad. Use this procedure for both the Windows and UNIX/Linux installations.

Before beginning this task, start the web server software under which you installed BusinessObjects Enterprise XI.

1. In a new browser window, enter the following URL for the admin launchpad (where *<machine\_name>* is the computer name and *<port>* is the web server port):

`http://<machine_name>:<port>/businessobjects/enterprise115/adminlaunch/`



BusinessObjects Enterprise XI Admin Launchpad window

2. Select the Central Management Console link and enter *administrator* (no password) to confirm that you can log in.
3. To confirm that you can access the user launch, enter the following URL in the browser address line for the user launchpad (where *<machine\_name>* is the computer name and *<port>* is the web server port):

`http://<machine_name>:<port>/businessobjects/enterprise115/desktoplaunch`

4. Select the link BusinessObjects Enterprise XI and enter the following to confirm that you can log in:

|                       |                     |
|-----------------------|---------------------|
| <b>System</b>         | <machine_name>:6400 |
| <b>Username</b>       | administrator       |
| <b>Password</b>       | (none)              |
| <b>Authentication</b> | Enterprise          |

BusinessObjects Enterprise XI logon window

---

**Note.** Remember that before you can use BusinessObjects Enterprise XI, you must complete additional installation and configuration procedures

---

## Task 11-3-18: Configuring the PeopleSoft Application for BusinessObjects Enterprise XI Integration

This section discusses:

- Preparing the PeopleSoft Application to Integrate with BusinessObjects Enterprise XI
- Running the Data Mover Script and Database Project
- Configuring the PeopleSoft Application Server
- Configuring the PeopleSoft Pure Internet Architecture
- Adding PeopleSoft Users for Integration
- Identifying the Local Default Node in your System
- Adding the Local Default Node as a Message Node to your Gateway
- Configuring Query Access Services
- Configuring Query Access Services Node Security

## Preparing the PeopleSoft Application to Integrate with BusinessObjects Enterprise XI

In the PeopleSoft application that you wish to integrate with BusinessObjects Enterprise XI, you will have to configure settings in the following areas:

- PeopleSoft Application Server
- PeopleSoft Web Server
- PeopleSoft Integration Broker
- Query Access Services (QAS)

## Running the Data Mover Script and Database Project

The PeopleSoft database as delivered is configured to run reports using Crystal 9. In order to use BusinessObjects Enterprise XI you need to run a data mover script and a project.

This will add pertinent roles and change the Crystal process types to use the BusinessObjects Enterprise XI executable.

1. Run Data Mover script CRTBOE.
2. Run Project CRTBOE.

## Configuring the PeopleSoft Application Server

To configure the application server:

1. Make sure that your PeopleSoft application server is down.
2. Access the PSADMIN Quick-Configure menu by launching `psadmin.exe` from the `<PS_HOME>\appserv` directory.

Select the domain to configure.

See “Configuring the Application Server on Windows.”

3. Set Analytic Servers (Feature 11) to Yes.

```

Quick-configure menu -- domain: HR84

```

| Features<br>=====           | Settings<br>=====                            |
|-----------------------------|----------------------------------------------|
| 1) Pub/Sub Servers : No     | 15) DBNAME : [HR84]                          |
| 2) Quick Server : No        | 16) DBTYPE : [MICROSFT]                      |
| 3) Query Servers : No       | 17) UserId : [QEDM0]                         |
| 4) Jolt : Yes               | 18) UserPswd : [QEDM0]                       |
| 5) Jolt Relay : No          | 19) DomainId : [TESTSERV]                    |
| 6) WSL : No                 | 20) AddToPATH : [c:\Program Files\Microsoft⇒ |
| SQL Server\80\Tools\Binn]   |                                              |
| 7) PC Debugger : No         | 21) ConnectID : [people]                     |
| 8) Event Notification : Yes | 22) ConnectPswd : [peop1e]                   |
| 9) MCF Servers : No         | 23) ServerName : []                          |
| 10) Perf Collator : No      | 24) WSL Port : [7000]                        |
| 11) Analytic Servers : Yes  | 25) JSL Port : [9000]                        |
| 12) Domains Gateway : No    | 26) JRAD Port : [9100]                       |

### Actions

=====

- 13) Load config as shown
- 14) Custom configuration
  - h) Help for this menu
  - q) Return to previous menu

Enter selection (1-26, h, or q):

4. Open psappsrv.cfg, the PeopleSoft Application Server configuration file, from the <PS\_HOME>\appserv\<DOMAIN> directory.
5. Change the MIN Instances and MAX Instances for the Application Server and Analytic Server to be greater than 1. (Of course, the MAX setting should be no less than the MIN setting.)

```
[PSAPPSRV]
;=====
; Settings for PSAPPSRV
;=====

;-----
; UBBGEN settings
Min Instances=2
Max Instances=4
```

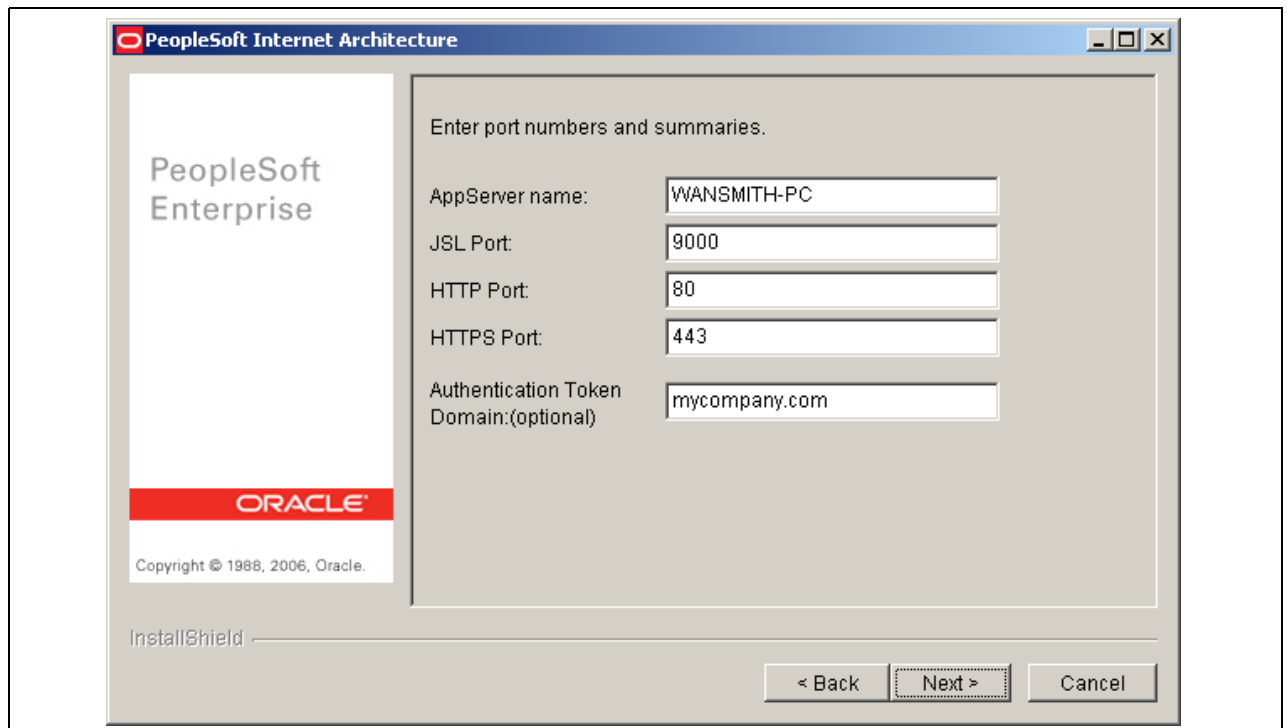
6. Re-start the application server.

## Configuring the PeopleSoft Pure Internet Architecture

To ensure that single sign-on works properly in the integration between PeopleSoft and BusinessObjects Enterprise XI the Authentication Token Domain in the PIA architecture must be configured and the PeopleSoft Integration Gateway properties must be set.

1. Run <PS\_HOME>\setup\PsmPPIAInstall\setup.exe.
2. Enter a value for the Authentication Token Domain.

See “Setting Up the PeopleSoft Pure Internet Architecture in GUI Mode,” Using Authentication Domains in the PeopleSoft Pure Internet Architecture Installation.



Specifying the Authentication Token Domain

## Adding PeopleSoft Users for Integration

To add User QAS\_Admin:

1. Navigate to PeopleTools, Security, User Profiles, User Profiles.
2. Select the Add a New Value tab.
3. Enter QAS\_Admin, and click the Add button.
4. Choose a symbolic id from the drop-down list.
5. Enter QAS\_Admin for password.
6. Select the ID tab.
7. Select *none* for the ID Type.

Enter “QAS administrative user” for description.

8. Select the Roles tab.
9. Enter QAS Admin, and click the Save button.

To add User BOE\_Admin:

1. Return to the Add a New User page.
2. Select the Add a New Value tab.
3. Enter BOE\_Admin, and click the Add button.
4. Choose a symbolic id from the drop-down list.
5. Enter BOE\_Admin for password.
6. Select the ID tab.

7. Select *none* for ID Type.

Enter “BOE administrative user” for description.

8. Select the Roles tab.
9. Enter BOE Admin, and QAS Admin, and click the Save button.

To add User BOE\_Viewing:

1. Return to the Add a New User page.
2. Select the Add a New Value tab.
3. Enter BOE\_Viewing, and click the Add button.
4. Choose a symbolic id from the drop-down list.
5. Enter BOE\_Viewing for password.
6. Select the ID tab.
7. Select *none* for ID Type.

Enter “BOE viewing user” for description.

8. Select the Roles tab.
9. Enter BOE Viewing, and click the Save button.

## Identifying the Local Default Node in your System

After you identify the Local default node, use it in the next procedure.

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Click the Search button to display a list of all nodes defined in the system.

There should be one (and only one) node designated as the Default Local Node. You can sort on the Default Local Node column header to quickly find the proper node. Look for the node that has a “Y” in the Default Local Node column in the search results.

Search Results

| Node Name | Description              | Local Node | Default Local Node | Node Type |
|-----------|--------------------------|------------|--------------------|-----------|
| H900R23B  | PS HRMS - Local Node     | 1          | Y                  | PIA       |
| HC801EI2  | HC801EI2 EIP remote node | 0          | N                  | PIA       |
| HC801EIP  | HC801EIP EIP remote node | 0          | N                  | PIA       |
| HC801SRC  | HC801SRC EIP remote node | 0          | N                  | PIA       |
| HC831EI2  | HC831EI2 EIP remote node | 0          | N                  | PIA       |
| HC831EIP  | HC831EIP EIP remote node | 0          | N                  | PIA       |
| HC831SRC  | HC831SRC EIP remote node | 0          | N                  | PIA       |
| HC881EI2  | HC881EI2 EIP remote node | 0          | N                  | PIA       |
| HC881EIP  | HC881EIP EIP remote node | 0          | N                  | PIA       |
| HC881SRC  | HC881SRC EIP remote node | 0          | N                  | PIA       |
| HC890EI2  | HC890EI2 EIP remote node | 0          | N                  | PIA       |
| HC890EIP  | HC890EIP EIP remote node | 0          | N                  | PIA       |
| HRMS      | Portal Node - HRMS       | 1          | N                  | PIA       |

Finding the Default Local Node



- Copy the node name to a text editor, as you will use it in a later step.

See Adding the Local Default Node as a Message Node to your Gateway.

### Adding the Local Default Node as a Message Node to your Gateway

You must update the PeopleSoft Integration Broker Gateway to recognize your PeopleSoft application server.

To add the Local default node:

- Log onto your PeopleSoft system with a user ID that has rights to access PeopleTools.
- Select PeopleTools, Integration Broker, Configuration, Gateways.
- Search and select the Gateway that is designated as the Local Gateway (that is, the Local Gateway check box is selected).
- In the URL field, enter the following value, where <machine\_name> is the machine where the Integration Broker is installed, and <port> is the port number where the PeopleSoft web server is listening:  
http://<machine\_name>:<port>/PSIGW/PeopleSoftListeningConnector
- Click Save.

You should get a “Loading Process was successful” message.

**Note.** If you are configuring the Gateway for the first time, you get a message prompting you to load connectors. Click OK. You get a confirmation message. click OK again.

**Gateways**

**Gateway ID:** LOCAL

☒ **Local Gateway** ☐ **Load Balancer**

**URL:**

[Gateway Setup Properties](#)

| Connectors      |             |                  |
|-----------------|-------------|------------------|
| *Connector ID   | Description | *Connector Class |
| 1 AS2TARGET     |             | AS2TargetConne   |
| 2 FILEOUTPUT    |             | SimpleFileTarget |
| 3 FTPTARGET     |             | FTPTargetConne   |
| 4 GETMAILTARGET |             | GetMailTargetCor |
| 5 HTTPTARGET    |             | HttpTargetConne  |
| 6 JMSTARGET     |             | JMSTargetConne   |
| 7 LDAPTARGET    |             | LDAPTTargetConn  |

Gateways page

- Select the Gateway Setup Properties link on this page.

This will take you to a page where you must enter the administrator userid and password.

**Gateways**  
**Gateway Properties**

Sign on to access integrationGateway.properties file.

The default user ID is 'administrator' and the default password is 'password'.

User ID

Password

☐ Change Password

OK Cancel

Gateway Properties sign on window

7. Add a new node in the PeopleSoft Node Configuration page and save.

**PeopleSoft Node Configuration**

URL: http://asp0215.peoplesoft.com:80/FSIGW/PeopleSoftListeningConnector

| Gateway Default App. Server |         |          |               |
|-----------------------------|---------|----------|---------------|
| App Server URL              | User ID | Password | Tools Release |
| //ASP0215:9000              | VP1     | ***      | 8.49          |

| PeopleSoft Nodes  |                  |           |          |               |
|-------------------|------------------|-----------|----------|---------------|
| Message Node Name | Web Server URL   | User ID   | Password | Tools Release |
| BOE_FMS           | http://FMSURL:80 | BOE_Admin | *****    | 8.49          |

Advanced Properties Page

OK Cancel Save

PeopleSoft Node Configuration page

**Note.** If the proper message node name already exists, you do not have to add it.

Enter the following values:

|                          |                                                                                                                   |
|--------------------------|-------------------------------------------------------------------------------------------------------------------|
| <b>Message Node Name</b> | The name of the Default Local Node that you had copied to your text editor earlier.                               |
| <b>Web Server URL</b>    | Enter the URL of the web server that is connected (through Jolt) to your PeopleSoft database's application server |
| <b>User ID</b>           | Enter user BOE_Admin and its password                                                                             |
| <b>Password</b>          | Enter the password for user BOE_Admin                                                                             |
| <b>Tools Release</b>     | Provide the precise PeopleTools release that your application server is using.                                    |

8. Click Save.  
Click the Ping Node button beside the message node name that you added to confirm success.
9. Click OK.
10. Restart the PeopleSoft web server in order for the configuration file changes to take effect.

## Configuring Query Access Services

To configure Query Access Services (QAS):

1. Select PeopleTools, Query Access Services, Configure.
2. All of the information on the screen is automatically pre-populated.
3. Click the Save button to save the information.

**Query Access Services** | **BusinessObjects Enterprise**

**Query Access Services Integration Gateway URL**

External Applications use this URL to interface with PeopleSoft Query Access Services (QAS). The URL is derived from the local Integration Gateway URL.

http://<machine name>:<port>/PSIGW/QueryListeningConnector

**QAS URL** http://rh-sun07.peoplesoft.com:7001/PSIGW/QueryListeningConnector/H900F **Ping**

[Edit Integration Gateway URL](#)

**Query Access Services Result Repository URL**

This is where the results of a PeopleSoft Query are placed. The machine name is the same as in the Integration Gateway URL above.

http://<machine name>:<port>/PSIGW/QASRepository/Writer

**URL** http://rh-sun07.peoplesoft.com:7001/PSIGW/QASRepository/Writer/H900R70A **Ping**

**Max Query Size (megabytes)** 500

**Save**

[Query Access Services](#) | [BusinessObjects Enterprise](#)

Query Access Services page

4. Copy the QAS URL entry into a text editor.  
Later when you configure the BusinessObjects Enterprise XI server, you will need to paste this text.
5. Select the BusinessObjects Enterprise tab.
6. Enter the user BOE\_Admin as the Administrative User, and enter its password.

**Query Access Services** BusinessObjects Enterprise

**BusinessObjects Enterprise**

Administrative User

Password

Viewing User

Password

**BusinessObjects Web Server**

This is the location of the BusinessObjects Enterprise (BOE) web server. Enter http:// followed by the machine name and port.

BOE Web Server URL

<http://qt-lnx05:7777/businessobjects/enterprise115/admin/en/admin.cwr>

**BusinessObjects Database**

This is the location of the BusinessObjects Enterprise (BOE) - Central Management Server (CMS) database. Enter the machine name and port. The BOE Domain Name is optional.

CMS Machine Name

BOE Domain Name

Specifying Administrative and Viewing users

7. Enter the user BOE\_Viewing as the Viewing User, and enter its password.

**Note.** The Administrative User is used by BusinessObjects Enterprise XI to schedule reports. The Viewing User is used to view reports.

8. Enter the URL for the BOE web server.
9. Enter the <machine\_name>:<port> for the CMS machine name.
10. Enter a meaningful name for the BOE Domain Name. Use UPPERCASE and do not use spaces.

Copy this to a text editor as you will use this value in the BOE server setup.

11. Click Save to save your settings.

## Configuring Query Access Services Node Security

To configure QAS node security:

1. Navigate to PeopleTools, Integration Setup, Node Definition. Search for node QAS\_REMOTE.
2. Enter user QAS\_Admin and save.
3. Navigate to PeopleTools, Integration Setup, Node Definition. Search for the default local node.

4. Enter user QAS\_Admin and save.

## Task 11-3-19: Configuring the BusinessObjects Enterprise XI Server

To enter PeopleSoft authentication information in BusinessObjects Enterprise XI:

1. In a browser, enter the following URL, substituting the name of your BusinessObjects Enterprise XI server for <machine\_name>, and the BusinessObjects Enterprise XI port number for <BOE\_port>:

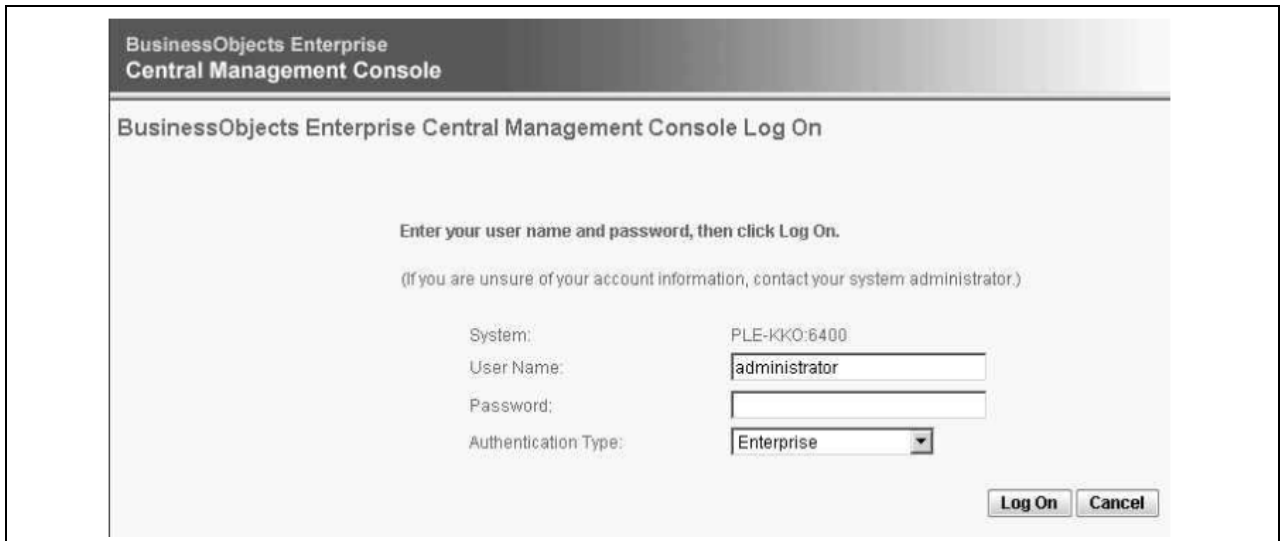
http://<machine\_name>:<BOE\_port>/businessobjects/enterprise115/adminlaunch/

---

**Note.** You can also click the Webserver Ping button on the QAS admin page to open the Central Manager Console.

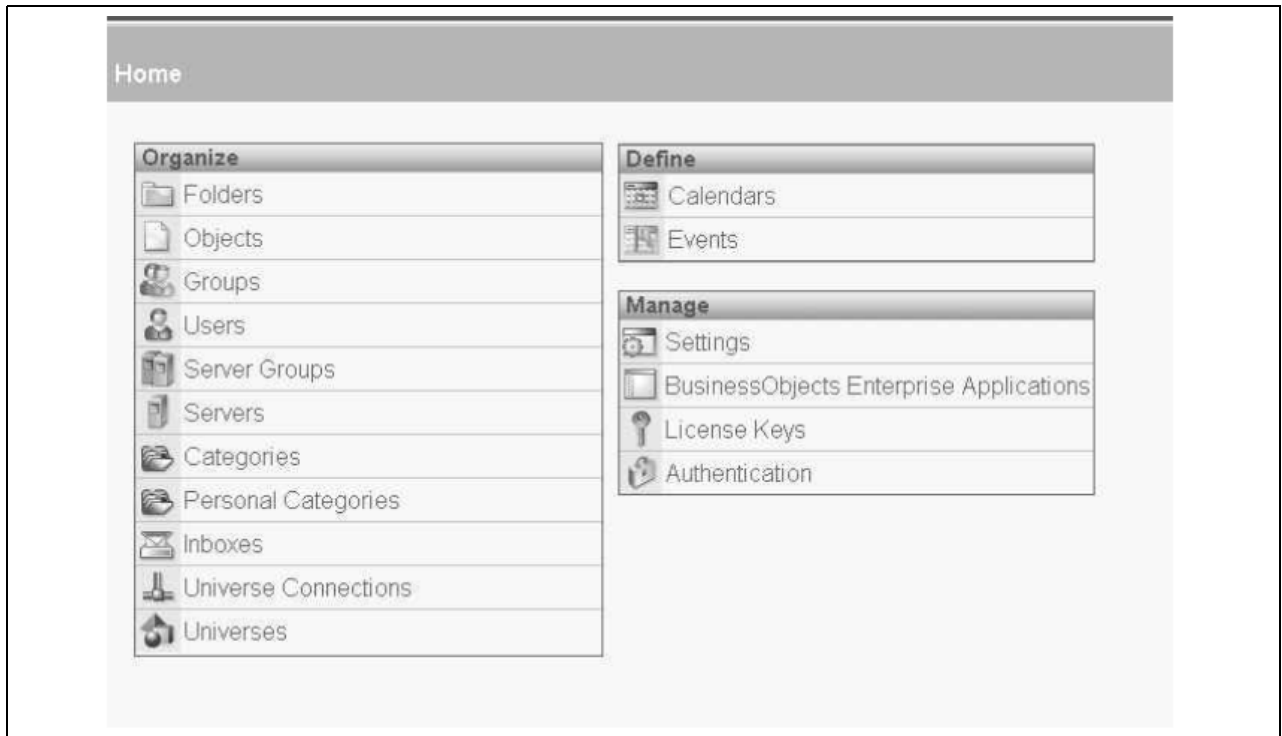
---

2. Log on with *administrator* and no password.

The screenshot shows the 'BusinessObjects Enterprise Central Management Console Log On' page. At the top, there is a header bar with the text 'BusinessObjects Enterprise Central Management Console'. Below this, the page title is 'BusinessObjects Enterprise Central Management Console Log On'. The main content area contains the instruction 'Enter your user name and password, then click Log On.' followed by a smaller note '(If you are unsure of your account information, contact your system administrator.)'. There are four input fields: 'System:' with the value 'PLE-KKO:6400', 'User Name:' with the value 'administrator', 'Password:' which is empty, and 'Authentication Type:' with a dropdown menu set to 'Enterprise'. At the bottom right, there are two buttons: 'Log On' and 'Cancel'.

Central Management Console log on

3. On the CMC Home page, click Authentication.



CMC Home page

4. Click the PeopleSoft Enterprise tab.

---

**Note.** If this tab is not present, it means the PeopleSoft Data Driver and Security Plugin have not been installed.

---

See Installing BusinessObjects Enterprise XI Integration on Windows.

See Installing BusinessObjects Enterprise XI Integration on UNIX or Linux.



Authentication page

5. Enter information on this page, then press the Update button at the bottom.

PeopleSoft Enterprise page

Query Access Services Integration Gateway URL page

- Select the check box Enable PeopleSoft Enterprise Authentication.
- In the PeopleSoft Enterprise System User field, enter BOE\_Admin as the user, and enter its password.
- Enter PeopleSoft Enterprise Domain information.

You can have up to one PeopleSoft Enterprise domain listed in the Current PeopleSoft Enterprise Domain box. To add a domain to this box enter the information into the New PeopleSoft Enterprise Domain box and click the Add button.

The value you enter here has two components separated by an equal (“=”) sign. The left-hand side is the name of the domain. This must be the same as the BOE Domain Name that you entered on the QAS configuration page, and that you copied to a text editor.

See Configuring the PeopleSoft Application for BusinessObjects Enterprise XI Integration, Configuring Query Access Services.

The right-hand side is the Query Access Services Integration Gateway URL that you copied into a text editor earlier when you configured the PeopleSoft application (see the second screen immediately above).

- Enter a value in the Default PeopleSoft Enterprise Domain Name field.

This value should match the Domain name specified in the Current PeopleSoft Enterprise Domain (that is, the characters that appear before the equal sign).

---

**Note.** The following three values must be exactly the same for proper configuration:

The BOE Domain Name on the PeopleSoft QAS Configuration page.

The domain portion of the Current PeopleSoft Enterprise Domain in the BOE XI CMC PeopleSoft Enterprise Authentication page.

The Default PeopleSoft Enterprise Domain Name in the BOE XI CMC PeopleSoft Enterprise Authentication page.

---

6. Use the information in the table to fill out these screens:

Mapped PeopleSoft Enterprise Roles page

Options for PeopleSoft Users



| PeopleSoft Role | New Alias Options                                                                         | Update Options                                                     | New User Options                                            |
|-----------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------------|-------------------------------------------------------------|
| BOE Admin       | (Choice 1) Assign each added PeopleSoft Enterprise alias to an account with the same name | (Choice 1) New aliases will be added and new users will be created | (Choice 1) New users are created as named users             |
| BOE Viewing     | (Choice 1) Assign each added PeopleSoft Enterprise alias to an account with the same name | (Choice 1) New aliases will be added and new users will be created | (Choice 2) New users are created as <i>concurrent</i> users |

For each PeopleSoft role in the table:

- a. Enter the role name.

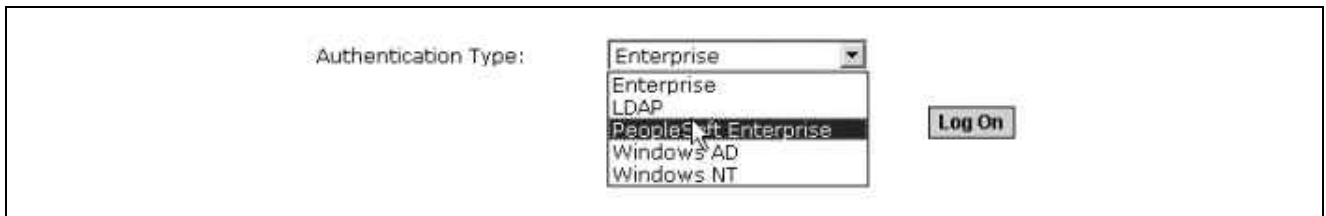
---

**Note.** Enter the role name only. The remaining information (for example, secpenterprise:R=PSIGW\ ) will be pre-pended after you click the Update button at the bottom of the page.

---

- b. Click the Add button.
- c. Select the options indicated in the table.
- d. Click the Update button.

After you add the PeopleSoft roles and update, you will see PeopleSoft Enterprise as a new Authentication Type when you log into the BusinessObjects Enterprise XI Central Management Console:



Authentication Type list

Also, User IDs from the PeopleSoft database with the given roles have been automatically added into BusinessObjects Enterprise XI.

You have completed the installation and configuration. Proceed to run the verification tests in the next section.

## Task 11-3-20: Verifying the PeopleSoft to BusinessObjects Enterprise XI Integration

Use these tests to ensure that the various features of BusinessObjects Enterprise XI are functional:

---

**Note.** Prior to running your verification tests, you need to convert your Crystal Reports from Crystal 9 format to Crystal 11 format. See Converting Crystal Reports for details.

---

1. Schedule and run a Crystal Report
  - a. Login to PeopleSoft as a user who has the authority to run report XRFWIN.
  - b. Select PeopleTools, Process Scheduler, System Process Request.

- c. Select the Add New Value tab.
  - d. Enter a new run control ID of BOETEST, and click the Add button.  
Click the Run button in the Process Request dialog box.
  - e. Select an active process scheduler server.
  - f. Select the check box next to the crystal report XRFWIN.
  - g. Select *Web* for the type and *CE RPT* for the format.
  - h. Click OK to run the report. It should generate a process instance id.
2. View Report output in InfoViewer
    - a. Using the Process Instance ID, ensure the process runs to completion in process monitor.
    - b. Select Reporting Tools, Report Manager, and select the Administration Tab.
    - c. Search for the report using the process instance id generated from step 2.
    - d. Click the Details link next to the report, then the .RPT link to view the report in the BusinessObjects Enterprise XI report viewer.

---

## Task 11-4: Migrating your BusinessObjects Enterprise XI Installation to a New Version of PeopleTools

You must complete several steps in order to ensure that your new version of PeopleTools integrates properly with your BusinessObjects Enterprise XI installation.

---

**Important!** If you fail to perform these steps in the correct order, you could compromise the installation.

---

1. Delete all PeopleSoft Users from the BusinessObjects Enterprise XI server as follows:
  - a. Login to the Central Management Console.
  - b. Select USERS from the navigation drop-down list and click the GO button.
  - c. Click the check box next to all PeopleSoft Users (not administrator or guest) and delete them.
2. Delete Roles in the BusinessObjects Enterprise XI server:
  - a. Login to the Central Management Console.
  - b. Click on the PeopleSoft Authentication tab.
  - c. Delete All the roles. Click Update.
3. Delete the Domains:
  - a. Delete All the Domains. Click Update.
  - b. Click LOGOFF.
  - c. Log back in to the Central Management Console and verify all that the roles and domains are gone.
4. Stop the BusinessObjects Enterprise XI Web Server and all the BusinessObjects Enterprise XI services.
5. Uninstall the PeopleSoft Integration for BusinessObjects Enterprise XI from the server.  
This is the integration that was installed for the old version of PeopleTools.

6. Install the PeopleSoft Integration for BusinessObjects Enterprise XI for the new version of PeopleTools.
7. Run the PeopleSoft Integration installer from the PeopleTools build you installed.
8. Run the verification steps in the task Installing BusinessObjects Enterprise XI, Verifying the PeopleSoft to BusinessObjects Enterprise XI Integration

---

## Task 11-5: Installing Crystal Reports XI

Install Crystal Reports XI only on workstations of those people who:

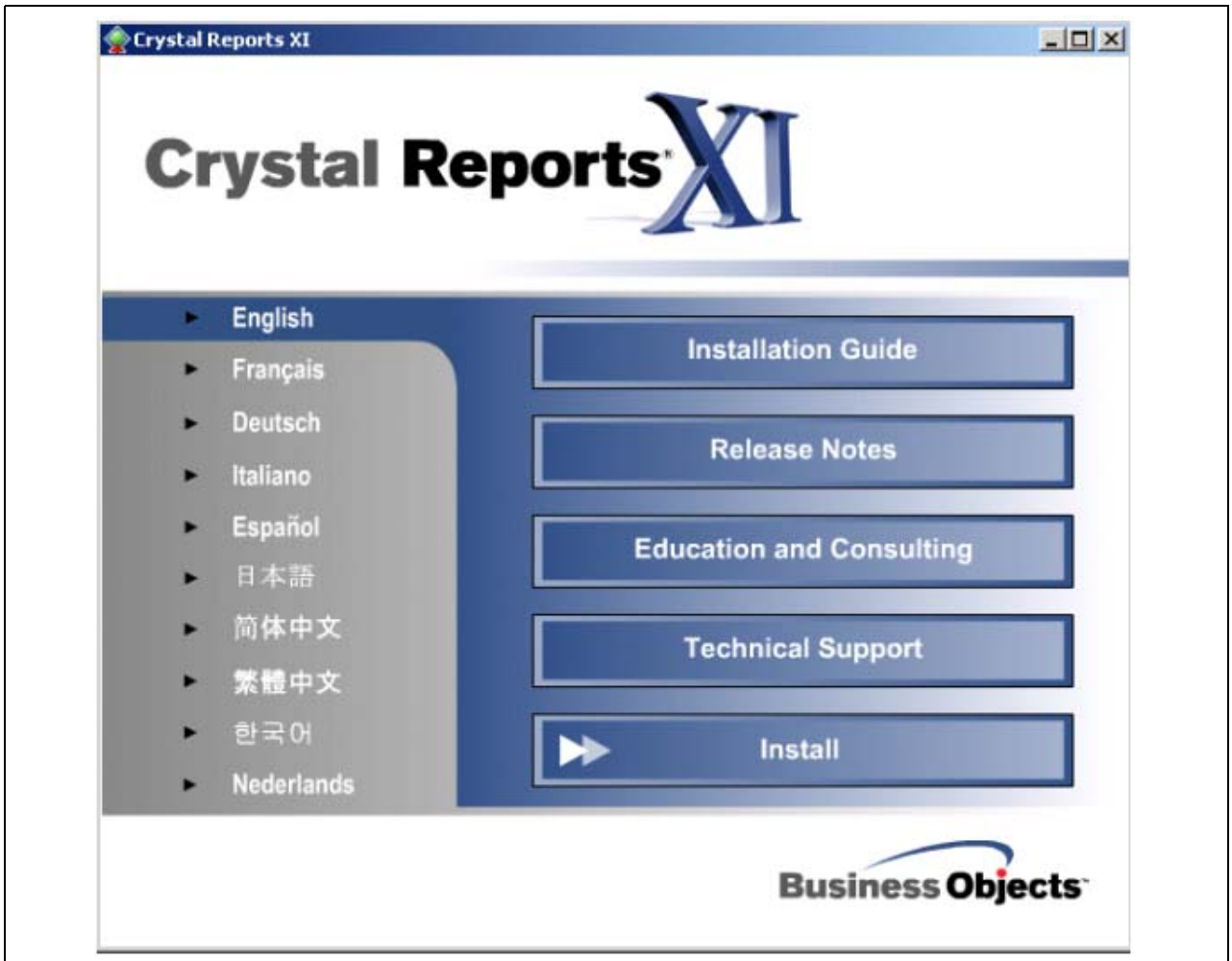
- will be creating or modifying report definitions
- will be running the conversion program to convert reports from Crystal 9 format to Crystal XI format

Simply running reports does not require installation of Crystal Reports XI.

Before beginning this task, verify that the target workstation meets the minimum system requirements as detailed in the Enterprise PeopleTools 8.49 Hardware and Software Requirements guide.

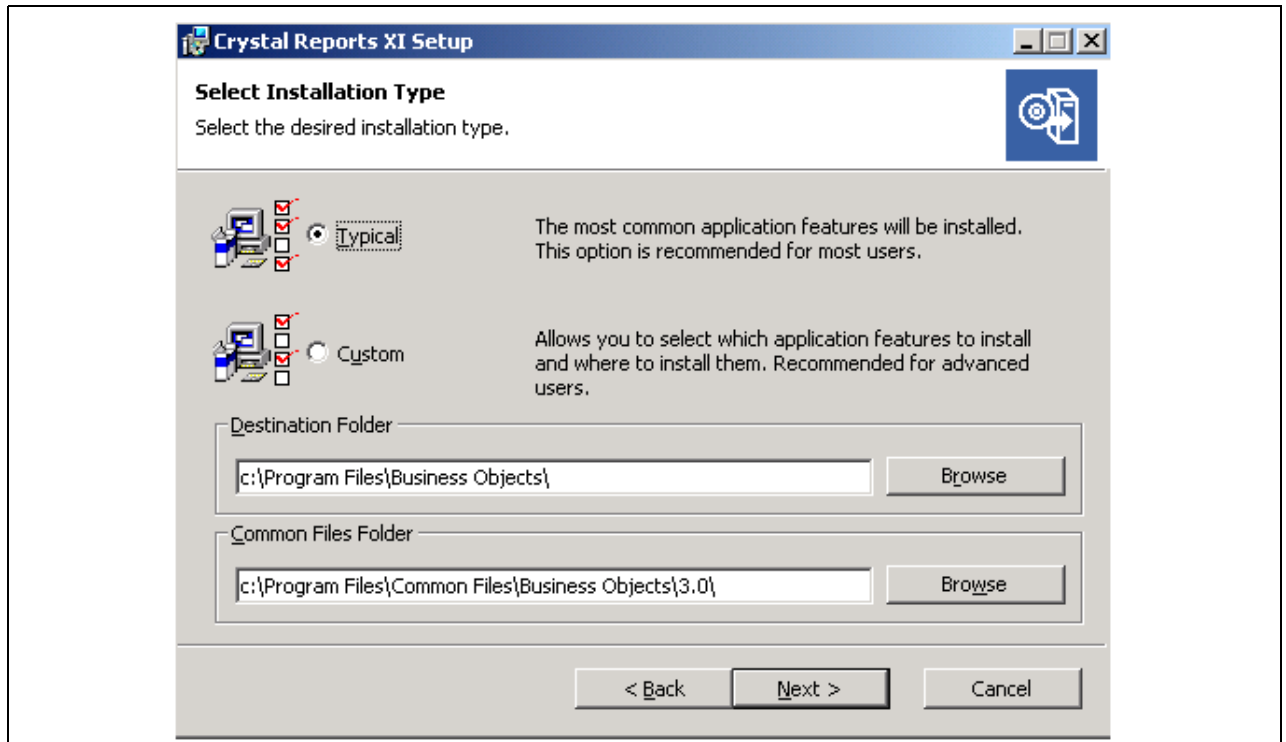
To install Crystal Reports XI:

1. Insert Crystal Reports XI for PeopleSoft Disk 1.  
It should start automatically. If it does not, run `CRXI_Autorun.exe` from the CD directory.
2. Select your language and click Install.



Crystal Reports XI dialog box

3. Accept the defaults on the following windows.
4. Select Typical installation and, if necessary change the destination folder and common files folder (it is recommended that you accept the defaults).

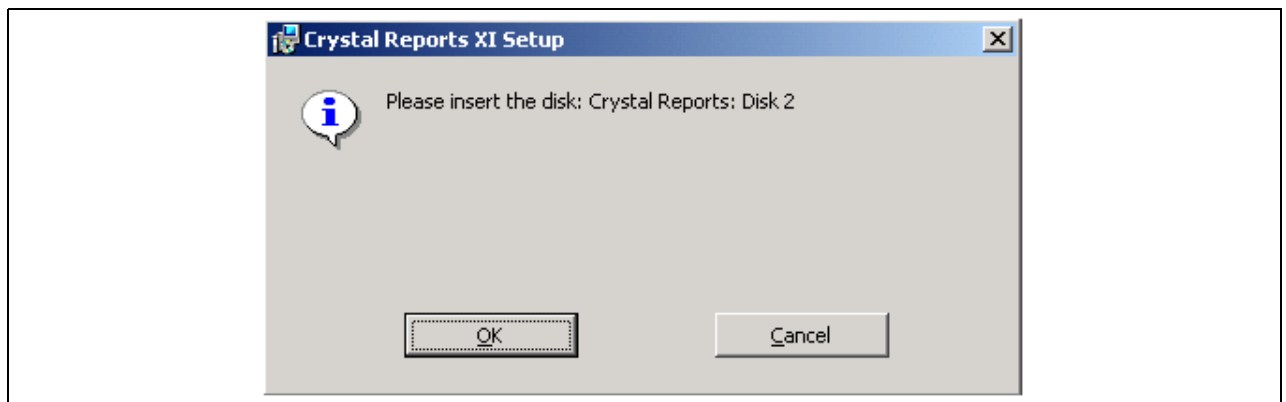


Select Installation Type dialog box

5. Click Next.

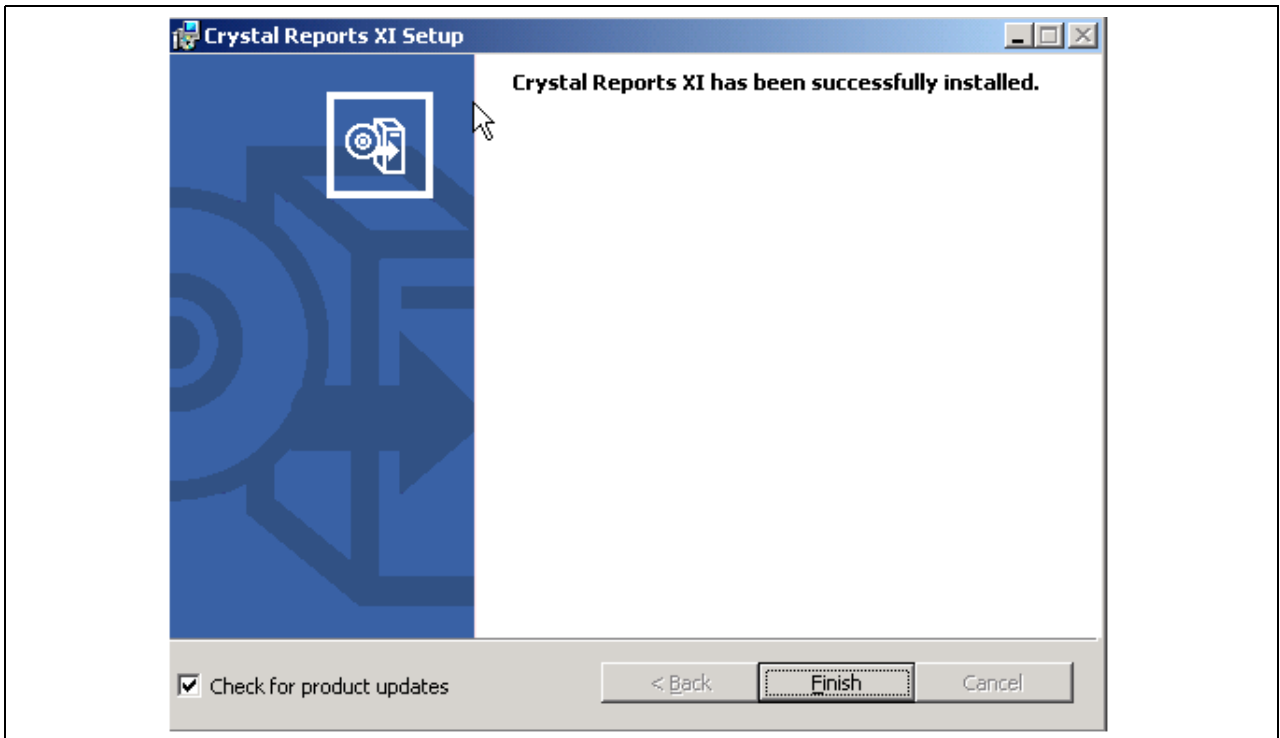
The installation begins. This takes several minutes.

6. Insert Disk 2 and click Next when this message box appears:



Crystal Reports XI Setup dialog box - insert disk

7. The installation proceeds. The installation is complete when this window appears:



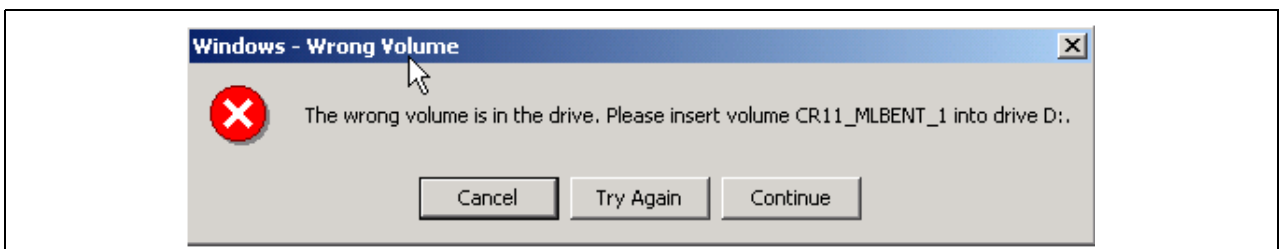
Crystal Reports XI Setup dialog box - successful installation

---

**Note.** If there are any product updates, you should install them.

---

8. Click the Finish button. If the following dialog box appears, click Continue.



Wrong volume dialog box

9. Set the PATH environment system variable after the Crystal Reports installation is complete to include:  
<CR\_DIR>\BusinessObjects Enterprise 11.5\win32\_x86

---

**Note.** <CR\_DIR> refers to the folder in which you installed Crystal Reports XI (for example, C:\Program Files\Business Objects\). Substitute your path.

---

## Task 11-6: Removing Crystal Reports XI

To remove Crystal Reports XI:

1. On the workstation where you installed Crystal Reports XI, select Start, Settings, Add/Remove Programs.
2. Highlight Crystal Reports XI.
3. Select Remove.

It will take several minutes for the removal to finish.

---

## Task 11-7: Administering and Using BusinessObjects Enterprise XI

This section discusses:

- Understanding PeopleSoft Permission Lists, Roles, and Users Involved in PeopleSoft Integration with BusinessObjects Enterprise XI
- Installing Patches
- Changing the Data Source of the BusinessObjects Enterprise XI Report Repository
- Uninstalling BusinessObjects Enterprise XI Integration
- Switching to Crystal 9 from BusinessObjects Enterprise XI
- Using Logging in BusinessObjects Enterprise XI
- Understanding BusinessObjects Enterprise XI License Codes

### Understanding PeopleSoft Permission Lists, Roles, and Users Involved in PeopleSoft Integration with BusinessObjects Enterprise XI

Certain PeopleSoft permission lists, roles, and users are necessary in order to have your PeopleSoft application integrate with BusinessObjects Enterprise XI. To run BusinessObjects Enterprise XI the following need to be present in the PeopleSoft database and then referenced in the appropriate places (described in the installation instructions) in both the PeopleSoft application and BusinessObjects Enterprise XI:

- PeopleSoft Permission Lists
- PeopleSoft Roles
- PeopleSoft Users IDs

The Permission Lists and Roles are added to the PeopleSoft database when you run the CRTOBOE project and CRTOBOE Data Mover script. The PeopleSoft users must be created manually.

---

**Note.** You should use the objects (that is, permission list and roles) as delivered. Do not rename them, delete them or otherwise alter them. This will only complicate and possibly compromise your installation.

---

#### *PeopleSoft Permission Lists:*

The following Permission Lists are inserted into the PeopleSoft database when you run the project CRTOBOE:

- PTPT2200

This is the “QAS Access” permission list. It provides permission to a number of web services related to Query Access Services (QAS).

This permission list is used only by the “QAS Admin” role. When the role is created, this association is already defined.

- PTPT2300

This is the “BOE Viewing” permission list.

### *PeopleSoft Roles*

The three roles listed here work hand-in-hand with the three PeopleSoft users that you need to create. The following Roles are inserted into the PeopleSoft database when you run the project CRTOBOE:

- “QAS Admin”

This role is associated with the QAS\_Admin and BOE\_Admin user IDs. This role (through the permission list associated with it) allows users associated with the role to make QAS web-service calls. Note that the name of this role CANNOT be changed, as it is hardcoded into the QAS web service implementation.

- “BOE Admin”

This role is associated with the BOE\_Admin user ID (which is configured in the PeopleSoft BusinessObjects Enterprise PIA page).

- “BOE Viewing”

This role is associated with the BOE\_Viewing user ID (which is configured in the PeopleSoft BusinessObjects Enterprise PIA page).

### *PeopleSoft Users*

You will have to create 3 PeopleSoft users in the PeopleSoft database. They work hand-in-hand with the three PeopleSoft roles described above. For ease of supportability we strongly suggest that you create the users with exactly the names specified. The users are:

- QAS\_Admin

This user makes QAS web service calls to PeopleSoft from BusinessObjects Enterprise. It is known only within the PeopleSoft application. BusinessObjects Enterprise XI is not aware of this user.

When user BOE\_Admin calls the PeopleSoft application from BusinessObjects Enterprise XI with a request to run a query through QAS, the user is switched programmatically from BOE\_Admin to QAS\_Admin to run the query.

- BOE\_Admin

This user is used:

- to run the Crystal 9 to Crystal XI report convert/publish utility
- by Process Scheduler to run reports in BusinessObjects Enterprise XI

This user is specified in the PeopleSoft BusinessObjects Enterprise PIA configuration page. The user will be created in BusinessObjects Enterprise XI automatically by specifying its corresponding role (that is, “BOE Admin”) in that application. This user is considered a named user in BusinessObjects Enterprise. Additionally, this user must also be in the BusinessObjects Enterprise XI administrators group.

- BOE\_Viewing

PeopleSoft Report Manager logs in to BusinessObjects Enterprise XI Interactive Viewer as this user in order to permit viewing dynamic report output. This user is specified in the PeopleSoft BusinessObjects Enterprise XI PIA configuration page.

The user will be created automatically in BusinessObjects Enterprise XI by specifying its corresponding role (that is, “BOE Viewing”) in that application.

This user id is a concurrent user in BusinessObjects Enterprise XI, which means that each time it logs into BusinessObjects Enterprise XI it will use a BOE concurrent access license.



Please note that multiple end-users (that is, real people) accessing reports concurrently in the BusinessObjects Enterprise XI Interactive Viewer via the PeopleSoft Report Manager will appear from the perspective of the BusinessObjects XI Interactive Viewer to be concurrent logins from the same user – BOE\_Viewing.

## **Task 11-7-1: Installing Patches**

While you may have installed patches for both BusinessObject Enterprise XI and the PeopleSoft Integration for BusinessObject Enterprise XI that were required at installation time, there may be other patches that you need to install after installation.

Check PeopleSoft Customer Connection to see whether there are patches you must install.

Installation instruction for each patch will be included with the patch.

## **Task 11-7-2: Changing the Data Source of the BusinessObjects Enterprise XI Report Repository**

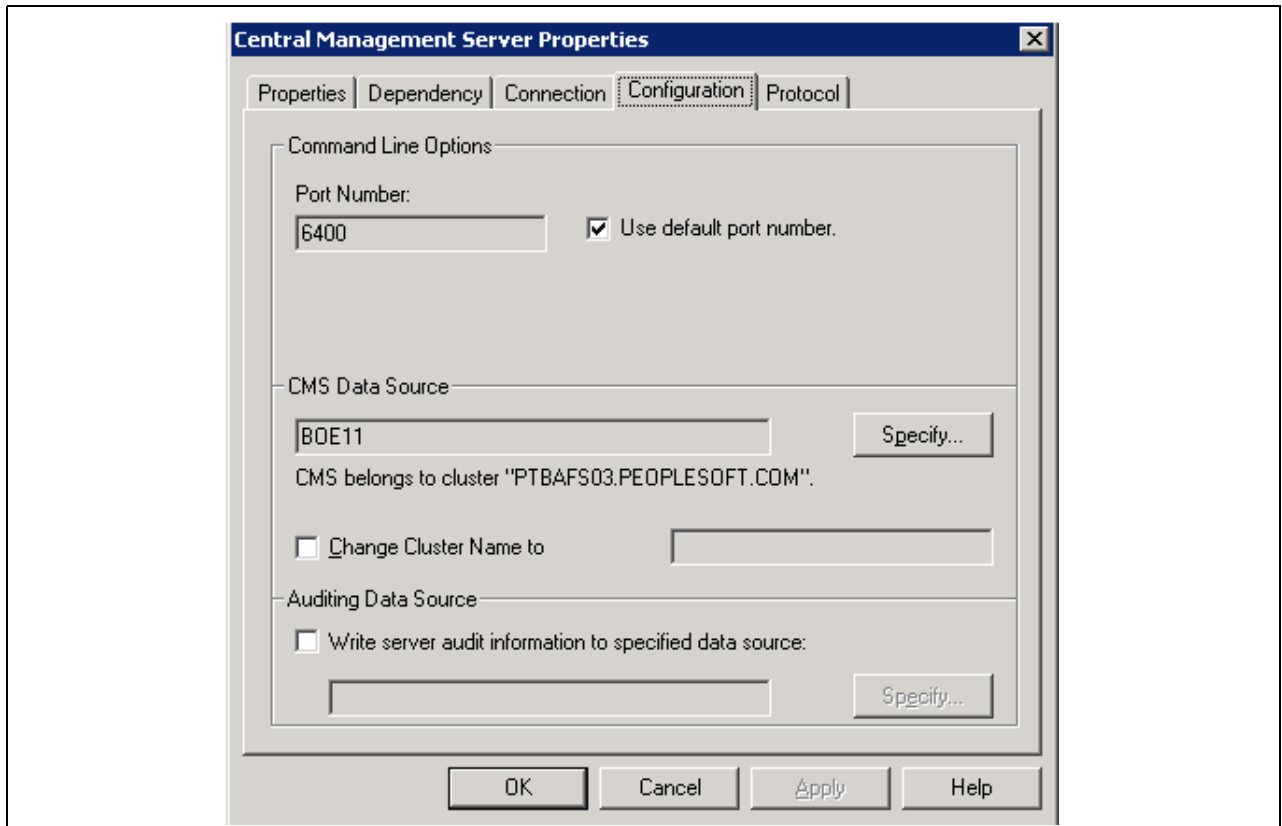
This section discusses:

- Changing the Data Source on Windows
- Changing the Data Source on UNIX or Linux

### **Changing the Data Source on Windows**

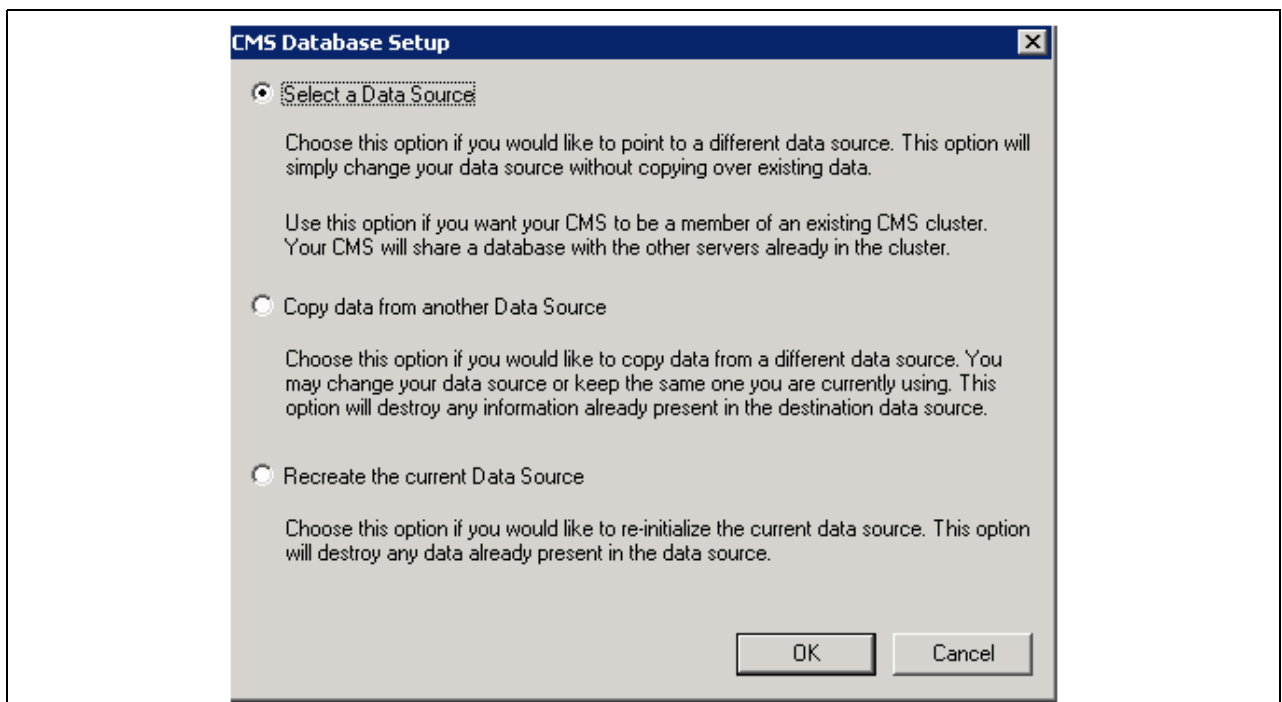
Use the steps in this section if you want to change the data source after you have completed the installation and integration.

1. Select Start, Programs, Business Objects XI, Business Objects Enterprise, Central Configuration Manager.
2. Right-click the Central Management Server and choose the Stop option.
3. Right-click the Central Management Server and select Properties.
4. Select the Configuration tab.
5. Click the Specify button in the CMS Data Source area.



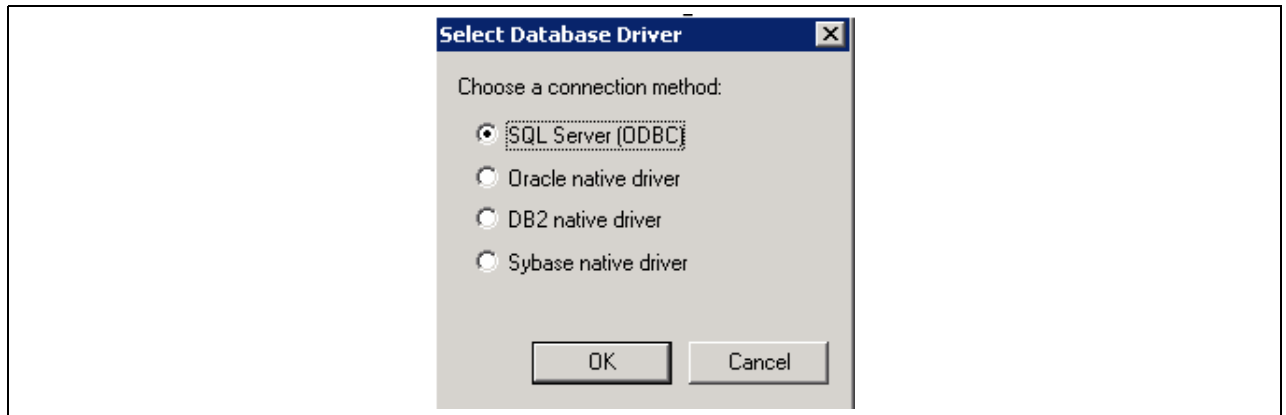
Central Management Server Properties dialog box: Configuration tab

6. Select the radio button Select a Data Source and click OK.



CMC Database Setup window

7. Specify whether you want to connect to the production CMS database through ODBC or through one of the native drivers, and then click OK.



Select Database Driver dialog box

- If you select ODBC, the Windows “Select Data Source” dialog box appears.  
Select the ODBC data source that corresponds to your CMS database; then click OK. If prompted, provide your database credentials and click OK.
  - If you select a native driver, you are prompted for your database server name, user id and password.
8. Click OK.  
The SvcMgr dialog box notifies you when the CMS database setup is complete.
  9. Start the Central Management Server.

### Changing the Data Source on UNIX or Linux

Use the steps in this section if you want to change the data source after you have completed the installation and integration.

1. Use the script `ccm.sh` to stop the Central Management Server.
2. Run `cmsdbsetup.sh`.  
When prompted, enter the CMS name or press Enter to select the default one.
3. Type 6 in order to specify source CMS.
4. Select the type of database connection.
5. Enter the database server name, user ID and password.
6. The script notifies you when the setup is complete.

## Task 11-7-3: Uninstalling BusinessObjects Enterprise XI Integration

This section discusses:

- Uninstalling PeopleSoft for BusinessObjects Enterprise XI on Windows
- Uninstalling the BusinessObjects XI Integration Kit for PeopleSoft on Windows
- Uninstalling BusinessObjects Enterprise XI on Windows
- Uninstalling PeopleSoft for BusinessObjects Enterprise XI on UNIX or Linux
- Uninstalling the BusinessObjects Enterprise XI Integration Kit for PeopleSoft on Unix or Linux
- Uninstalling BusinessObjects Enterprise XI on UNIX or Linux

Uninstalling BusinessObjects Enterprise XI integration is a three step process no matter what OS platform you are using. These steps should be followed in order

1. Uninstall the PeopleSoft for BusinessObjects Enterprise XI integration
2. Uninstall the BusinessObjects Enterprise XI Integration Kit for PeopleSoft
3. Uninstall BusinessObjects Enterprise XI

This section discusses

- Uninstalling PeopleSoft for BusinessObjects Enterprise XI on Windows
- Uninstalling the BusinessObjects XI Integration Kit for PeopleSoft on Windows
- Uninstalling BusinessObjects Enterprise XI on Windows
- Uninstalling PeopleSoft for BusinessObjects Enterprise XI on UNIX or Linux
- Uninstalling the BusinessObjects XI Integration Kit for PeopleSoft on Unix or Linux
- Uninstalling BusinessObjects Enterprise XI on UNIX or Linux

## Uninstalling PeopleSoft for BusinessObjects Enterprise XI on Windows

To uninstall PeopleSoft for BusinessObjects Enterprise XI on windows: .

1. Select Start, Settings, Control Panel.
2. Select Add/Remove Programs.
3. Select BusinessObjects Enterprise XI for PeopleSoft Integration.
4. Click Remove.

## Uninstalling the BusinessObjects XI Integration Kit for PeopleSoft on Windows

To uninstall BusinessObjects XI Integration Kit for PeopleSoft on Windows:

1. Select Start, Settings, Control Panel.
2. Select Add/Remove Programs.
3. Select BusinessObjects Enterprise XI Kit for PeopleSoft Integration.
4. Click Remove.

## Uninstalling BusinessObjects Enterprise XI on Windows

After removing the BusinessObjects Enterprise XI integration to PeopleSoft, use these steps to uninstall BusinessObjects Enterprise XI:

---

**Note.** These instructions assume that Crystal Reports XI is not installed on the same machine as BusinessObjects Enterprise XI.

---

1. Select Start, Settings, Control Panel, Add or Remove Programs.
2. Remove Business Objects XI.
3. Remove the following directories:
  - <BOE\_DIR>\Business Objects, where <BOE\_DIR> is the directory where you installed BusinessObjects Enterprise XI. If you accepted the defaults during installation, this is C:\Program Files\Business Objects.
  - <BOE\_DIR>\Common Files\Business Objects

- Find and delete the following registry keys.

---

**Warning!** Using the Registry Editor incorrectly can cause serious problems that may require you to reinstall the Windows operating system. Use Registry Editor at your own risk. It is strongly advised that you make a backup copy of the registry files (System.dat and User.dat on Win9x computers) before you edit the registry.

---

- HKEY\_LOCAL\_MACHINE\SOFTWARE\Business Objects
- HKEY\_LOCAL\_MACHINE\Software\Business Objects
- HKEY\_USERS\S-#-#-###...-####\Software\Business Objects

The number signs (#) represent a series of numbers that are different on each computer.

- HKEY\_USERS\DEFAULT\Software\Business Objects

- If you have both Business Objects and Crystal Reports installed on your system, you must also delete the Crystal Reports folders, and delete the Crystal Reports registry key, as described above.
- Reboot your system.

### Uninstalling PeopleSoft for BusinessObjects Enterprise XI on UNIX or Linux

To uninstall the BusinessObjects Enterprise XI integration to PeopleSoft on UNIX or Linux, you must first uninstall the PeopleSoft for BusinessObjects Enterprise XI integration, then uninstall BusinessObjects Enterprise XI.

- Enter the following command, where <BOE\_INTEG\_HOME> is the directory where you installed BusinessObjects Enterprise XI Integration, and <OS> is your database platform:

```
<BOE_INTEG_HOME>/_uninst/uninstallaer.<OS> -console
```

- At the following prompt, enter *I* for Next to continue:

```
InstallShield Wizard
```

```
Initializing InstallShield Wizard...
```

```

Welcome to the InstallShield Wizard for Integration Kit for PeopleSoft
Enterprise 11.0
```

```
The InstallShield Wizard will uninstall Integration Kit for PeopleSoft
Enterprise 11.0 from your computer.
To continue, choose Next.
```

```
Integration Kit for PeopleSoft Enterprise 11.0
Oracle
http://www.oracle.com
```

```
Press 1 for Next, 3 to Cancel or 5 to Redisplay [1] 1
InstallShield Wizard
```

```
Initializing InstallShield Wizard...
```

-----  
Welcome to the InstallShield Wizard for Integration Kit for PeopleSoft  
Enterprise 11.0

The InstallShield Wizard will uninstall Integration Kit for PeopleSoft  
Enterprise 11.0 from your computer.  
To continue, choose Next.

Integration Kit for PeopleSoft Enterprise 11.0  
Oracle  
<http://www.oracle.com>

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

3. At the following prompt, enter 1 for Next to continue:

Select the features for "Integration Kit for PeopleSoft Enterprise 11.0" you  
would like to uninstall:

[x] Integration Kit for PeopleSoft Enterprise 11.0

To select/deselect a feature or to view its children, type its number:

1. [x] Native Drivers
2. [x] Security Plug-in (Server Side)
3. [x] Security Plug-in (Web Content)
4. [x] Security Plug-in (Client Side Java Version)

Other options:

- 1. Deselect 'Integration Kit for PeopleSoft Enterprise 11.0'
0. Continue uninstalling

Enter command [0]

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

4. At the following prompt, confirm the directory where BusinessObjects Enterprise is installed and then  
enter 1 for Next to continue:

Integration Kit for PeopleSoft Enterprise 11.0 will be uninstalled from the  
following location:

/ds1/home/bobje/installation/peoplesoft

with the following features:

Native Drivers

```
Security Plug-in (Server Side)
Security Plug-in (Web Content)
Security Plug-in (Client Side Java Version)
```

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

5. Confirm the uninstallation is correct and enter 3 to finish:

```
Uninstalling Integration Kit for PeopleSoft Enterprise 11.0...
```

```

The InstallShield Wizard has successfully uninstalled Integration Kit for
PeopleSoft Enterprise 11.0. Choose Finish to exit the wizard.
Press 3 to Finish or 5 to Redisplay [3]
```

## Uninstalling the BusinessObjects Enterprise XI Integration Kit for PeopleSoft on Unix or Linux

To uninstall BusinessObjects Enterprise XI Integration Kit for PeopleSoft on UNIX or Linux, you must manually delete the necessary files and registry entries.

### *Files:*

The files to be deleted are listed in the table below. Please bear the following points in mind while using the table to delete the files:

- The values for <destination folder> and <JAR root folder> are specific to your installation.
- File extensions differ by operating system:
  - Solaris/Linux — so
  - AIX — a
  - HP-UX — sl

The table below shows files with the “so” extension.

- Different languages use different folder names. Locations in the table are for English using the “en” folder. For example, German uses “de”.

| File                        | Location                   |
|-----------------------------|----------------------------|
| <b>Native Driver Module</b> |                            |
| crdb_psqry.so               | <\$CRPEPATH>               |
| crpsqrybridge.so            | <destination folder>       |
| crpsqryserver               | <destination folder>       |
| crpsserverloader.so         | <destination folder>       |
| crpsstatus_res_en.so        | <destination folder>       |
| psqry.jar                   | <JAR root folder>/default/ |

| File                                   | Location                                                                                                                                                                                                   |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| eBus405.jar                            | <JAR root folder>/default/businessobjects                                                                                                                                                                  |
| <b>Security plug-in module</b>         |                                                                                                                                                                                                            |
| secPS8_pin.xml                         | \$BOBJEDIR/enterprise/packages/                                                                                                                                                                            |
| secPS8.msi                             | \$BOBJEDIR/enterprise/packages/                                                                                                                                                                            |
| secPS8.so                              | \$BOBJEDIR/enterprise/\$SOFTWAREPATH/plugins/auth/secPS8 /                                                                                                                                                 |
| crpsstatus_res_en.so                   | <destination folder>                                                                                                                                                                                       |
| crpssoserver                           | <destination folder>                                                                                                                                                                                       |
| crpsssoconnector.so                    | <destination folder>                                                                                                                                                                                       |
| crpsserverloader.so                    | <destination folder>                                                                                                                                                                                       |
| pssso.jar                              | <JAR root folder>/default                                                                                                                                                                                  |
| eBus405.jar                            | <JAR root folder>/default/businessobjects/                                                                                                                                                                 |
| admin.csp                              | \$BOBJEDIR/webcontent/enterprise11/admin/en/secPS8/                                                                                                                                                        |
| admin_commit.csp                       | \$BOBJEDIR/webcontent/enterprise11/admin/en/secPS8/                                                                                                                                                        |
| secPS8_common.csp                      | \$BOBJEDIR/webcontent/enterprise11/admin/en/secPS8/                                                                                                                                                        |
| On-line help files (htm, js, gif, ...) | \$BOBJEDIR/webcontent/enterprise11/PS8/                                                                                                                                                                    |
| <b>Documentation</b>                   |                                                                                                                                                                                                            |
| user.pdf                               | <destination folder>                                                                                                                                                                                       |
| <b>Security Plug-in Java Client</b>    |                                                                                                                                                                                                            |
| secPS8.jar                             | You integrate this manually in a Java Application Server (such as WebSphere and WebLogic) as a part of the Java version of BusinessObjects View according to the integration kit documentation (user.pdf). |

**Note.** \$CREPATH is an environment variable, that itself may have an env. variable that needs to be resolved. \$CREPATH is defined in the env.sh file that is installed and configured during the BusinessObjects enterprise installation.

Example: CREPATH=\$BOBJEDIR/enterprise/\$SOFTWAREPATH/crpe/

### Registry Entries



BusinessObjects registry keys are created as a hierarchy of files and folders under a folder that is identified by the \$BOE\_REGISTRYHOME environment variable. The \$BOE\_REGISTRYHOME environment variable itself is defined in the env.sh file. The Integration Kit specific registry keys are represented with the following sub folders (including all other subfolders and files within them):

- integration kit for peoplesoft
- secps8

## Uninstalling BusinessObjects Enterprise XI on UNIX or Linux

To uninstall BusinessObjects Enterprise XI on UNIX or Linux:

1. Disable and stop all of the BusinessObjects Enterprise XI servers.
2. Run the script `$bobje/uninstallBOBJE.sh`.

This script deletes all of the files installed during your original installation of BusinessObjects Enterprise XI.

---

**Note.** You may also notice scripts in the `%bobje/uninstall` directory. Do not run the scripts in the `%bobje/uninstall` directory manually. Each of these scripts removes only the files associated with a single BusinessObjects Enterprise XI component, which may leave your BusinessObjects Enterprise XI system in an indeterminate state.

---

3. Remove all of the files in the `$bobje` directory by running the command `rm -rf`.  
This removes files that are created during the installation process, or files created by the system or by users after installation, that are not removed by the `uninstallBOBJE.sh` script.
4. If you performed the “system” installation type, you will also need to delete the run control scripts from the appropriate `/etc/rc#` directories.

## Task 11-7-4: Switching to Crystal 9 from BusinessObjects Enterprise XI

Use the instructions in this section if you need to switch your environment back to run Crystal Reports using the Crystal Reports 9 runtime instead of the BusinessObjects Enterprise XI server.

To switch from using BusinessObjects Enterprise XI to Crystal Reports:

1. Run the DMS script `boetocr.dms`
2. Run the project `BOEtoCR`.

Running this script and project will change your delivered Crystal process type back to use Crystal 9.

---

**Note.** This will not change any process types that you created.

---

You cannot run any reports converted to BusinessObjects Enterprise XI format using Crystal Reports. You have to run your original Crystal reports.

## Task 11-7-5: Using Logging in BusinessObjects Enterprise XI

This section discusses:

- Enabling Web Component Adapter Logging
- Enabling BusinessObjects Enterprise XI Server Logging

- Enabling Security Plug-in Logging
- Enabling BusinessObjects Enterprise XI Services Tracing

## Enabling Web Component Adapter Logging

The integration between PeopleSoft and BusinessObjects Enterprise XI requires a special version of the Web Component Adapter. It is delivered as a war file called `pswebcompadapter.war`.

To enable logging:

1. Stop the application server running BusinessObjects Enterprise XI.
2. Extract the `web.xml` file from the `pswebcompadapter.war` archive.
3. Edit the file using a text editor. The relevant entries to edit are:

| Context Parameter | Description                                                                                                                              |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| Log.file          | Filename of the log file including full real path to file, including extension. The default is WCA, with no path.                        |
| Log.ext           | File extension of log file; the default is .log                                                                                          |
| Log.isRolling     | Determines whether or not the logs will be rotated; the default value is true.                                                           |
| Log.size          | If log rolling is turned on, this will govern the maximum size allowed before the log file is rotated. Accepted suffixes: MB, KB, and GB |
| Log.level         | The default log level is "ERROR"<br><br>Possible values are: ALL, DEBUG, INFO, WARN, FATAL, ERROR, OFF                                   |

| Context Parameter | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Log.entryPattern  | <p>This is the log4j Pattern Layout. Log4j is a standard for logging in XML files for Java application servers. It formats logging events according to the pattern specified.</p> <p>If no value is specified, the entry in the log will display the date, thread, level or priority of the logging event, and the message.</p> <p>Conversion patterns are composed of literal text and conversion specifiers. Literal text is output as is. Conversion specifiers consist of the % character followed by an optional format modifier and a mandatory conversion character.</p> <p>For example: %-5p [%t]: %m%n</p> <p>Please refer to log4j documentation for accepted log patterns.</p> |
| Log.Flags         | <p>Possible values are:</p> <ul style="list-style-type: none"> <li>-trace</li> <li>-reqtrace</li> <li>-noassert</li> <li>-stackdump</li> <li>-nativeassert</li> <li>-nonativeassert</li> <li>-notraceoutput</li> <li>-filelogFilter</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                            |

4. Reinsert the file into the WEB-INF directory in pswebcompadapter.war.

---

**Note.** To reinsert web.xml into WEB-INF using WinZip, right-click on the WEB-INF directory that contains your edited web.xml file and select “Add to Zip File...”. Adding the file in this way ensures that it is placed in the correct directory inside the archive.

---

5. Restart your application server.

When you install more than one WCA, each pswebcompadapter.war file contains its own web.xml file containing configuration parameters for that WCA.

For more information on configuring the Web Component Adapter please refer to the section in the BusinessObjects Administration Guide, “Configuring the Web Component Adapter.”

### Enabling BusinessObjects Enterprise XI Server Logging

Each of the BusinessObjects Enterprise XI servers is designed to log messages to your operating system’s standard system log.

On Windows, BusinessObjects Enterprise XI logs to the Event Log service. You can view the results with the Event Viewer (in the Application Log).

On UNIX, BusinessObjects Enterprise XI logs to the syslog daemon as a User application. Each server prepends its name and PID to any messages that it logs.

Each server also logs assert messages to the logging directory of your product installation. The programmatic information logged to these files is typically useful only to Business Objects support staff for advanced debugging purposes. The location of these log files depends upon your operating system:

- On Windows, the default logging directory is C:\Program Files\Business Objects\BusinessObjects Enterprise 11.5\Logging.
- On UNIX, the default logging directory is the <INSTALL\_ROOT>/bobje/logging directory of your installation.

It is important to note that these log files are cleaned up automatically, so there will never be more than approximately 1 MB of logged data per server.

For more information on Logging BusinessObjects Enterprise XI server activity please refer to the BusinessObjects Enterprise Admin Guide Section “Logging Server Activity.”

## Enabling Security Plug-in Logging

The procedure to turn on security plug-in logging varies by operating system.

---

**Note.** Return the log mode to a value of 0 when you do not need logging. Performance will be impacted otherwise.

---

- Windows:

To turn on logging, edit the Windows registry.

```
HKLM\SOFTWARE\Business Objects\Suite 11.0\Integration Kit for PeopleSoft⇒
Enterprise
Log Mode
```

1. Change the Log Mode value from 0 to 1.
2. Restart the services CMS.

This will then generate log files in the directory specified in Path Log. You may want to clean up that directory first, if logging had been turned on before.

- UNIX and Linux:

To turn on logging you need to update the Log Mode setting in the registry file.

The registry file is located at: <BOE\_DIR>/bobje/data/.bobj/registry

1. Open the file in a text editor and set the value of "Log Mode" to "1".
2. Restart the services (CMS, Job Server, Page Server, Report Application Server). This will turn on the driver/security plug-in tracing.

## Enabling BusinessObjects Enterprise XI Services Tracing

It is also possible to turn on tracing for the BusinessObjects Enterprise XI services. This involves updating the command line for each of the services and adding *-trace* at the end. Depending on the Operating System on which you are running BusinessObjects Enterprise XI the procedure to do this varies.

Remove the *-trace* from the command line after your testing is complete as it can cause performance issues with the servers because of the large number of log files created.

*Windows:*

1. Log on to the Crystal Configuration Manager with an account with administrative privileges.

2. Highlight the server you would like to enable tracing on and click the Stop button.
3. Double-click the server, add *-trace* to the command line, and click the Start button.

Completing the steps will enable advanced logging on a Crystal Enterprise, Crystal Reports Server, or BusinessObjects Enterprise XI server for Windows.

To review the logs open Windows Explorer and navigate to the logging directory:

*X:\Program Files\Business Objects\BusinessObjects Enterprise 11.5\Logging*

where X is the drive letter where software was installed.

*UNIX or Linux:*

1. Go to the \$bobje\$\bobje folder.
2. Edit ccm.config file. Add "-trace" at the end of services that you want to logging.
3. Restart all servers.

The log files write to the \$bobje\$\bobje\logging folder.

## Task 11-7-6: Understanding BusinessObjects Enterprise XI License Codes

Access to BusinessObjects Enterprise XI is based on license codes. There are two types of license codes relevant to BusinessObjects Enterprise XI:

- Named Users licences
- Concurrent Access licences

Named users licenses allow a specific user access to BusinessObjects Enterprise XI. If you are a named user, you have access to BusinessObjects Enterprise XI regardless of how many other users are connected to the system.

Concurrent access licenses allow a certain number of unspecified users access to BusinessObjects Enterprise XI from a pool of users. If you are a concurrent user, you have access to BusinessObjects Enterprise XI only if there are Concurrent Access Licenses that are not being used by other concurrent users.

The OEM license codes delivered by Oracle for the integration between PeopleSoft and BusinessObjects Enterprise allow for:

- 1 Named User license
- 5 Concurrent Access licences

In the context of PeopleSoft applications integrated with BusinessObjects Enterprise XI, the one Named User License is reserved for use by Process Scheduler to schedule reports to be run by BusinessObjects Enterprise XI.

In the context of PeopleSoft applications integrated with BusinessObjects Enterprise XI, Concurrent Access Licenses are used in these ways:

- when a user views a report using the BusinessObjects Enterprise XI Interactive Viewer
- when a user logs into the BusinessObjects Enterprise XI Central Management Console (CMC) directly using a user id set up as a concurrent user

After a user is done viewing the report in either scenario, the Concurrent Access license is then free to be used by another user.

---

**Note.** Viewing a report in Acrobat (pdf) format or in viewers other than the BusinessObjects Enterprise XI Interactive Viewer does not use a Concurrent Access License.

---

A relatively small number of concurrent access licenses can support a large number of users. The number of users that it will support depends on how many reports users view and how long they view them.

It is likely that you will want to purchase additional Concurrent Access licenses to provide greater access for more users. You can do so by contacting your Oracle sales representative.

When you purchase more Concurrent Access Licenses, you will be provided a License Code. You will need to add this License Code to your BusinessObjects Enterprise XI installation.

To enter license codes:

1. In a browser, enter the following URL, substituting the name of your BusinessObjects Enterprise XI server for <machine\_name>, and the BusinessObjects Enterprise XI port number for <BOE\_port>:

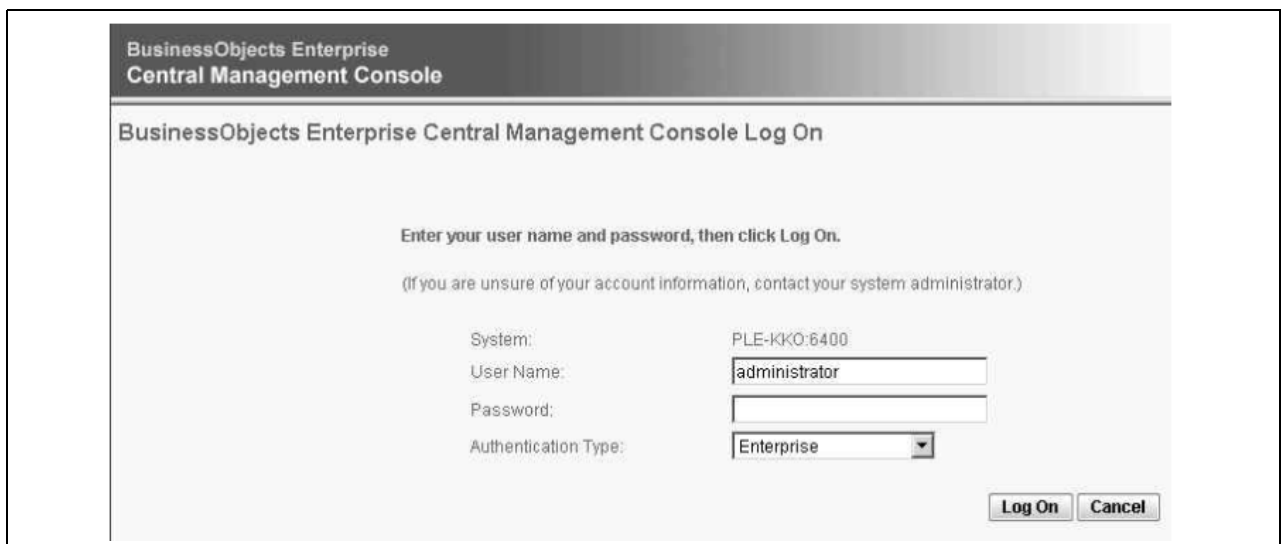
`http://<machine_name>:<BOE_port>/businessobjects/enterprise115/adminlaunch/`

---

**Note.** You can also click the Webserver Ping button on the QAS admin page to open the Central Manager Console.

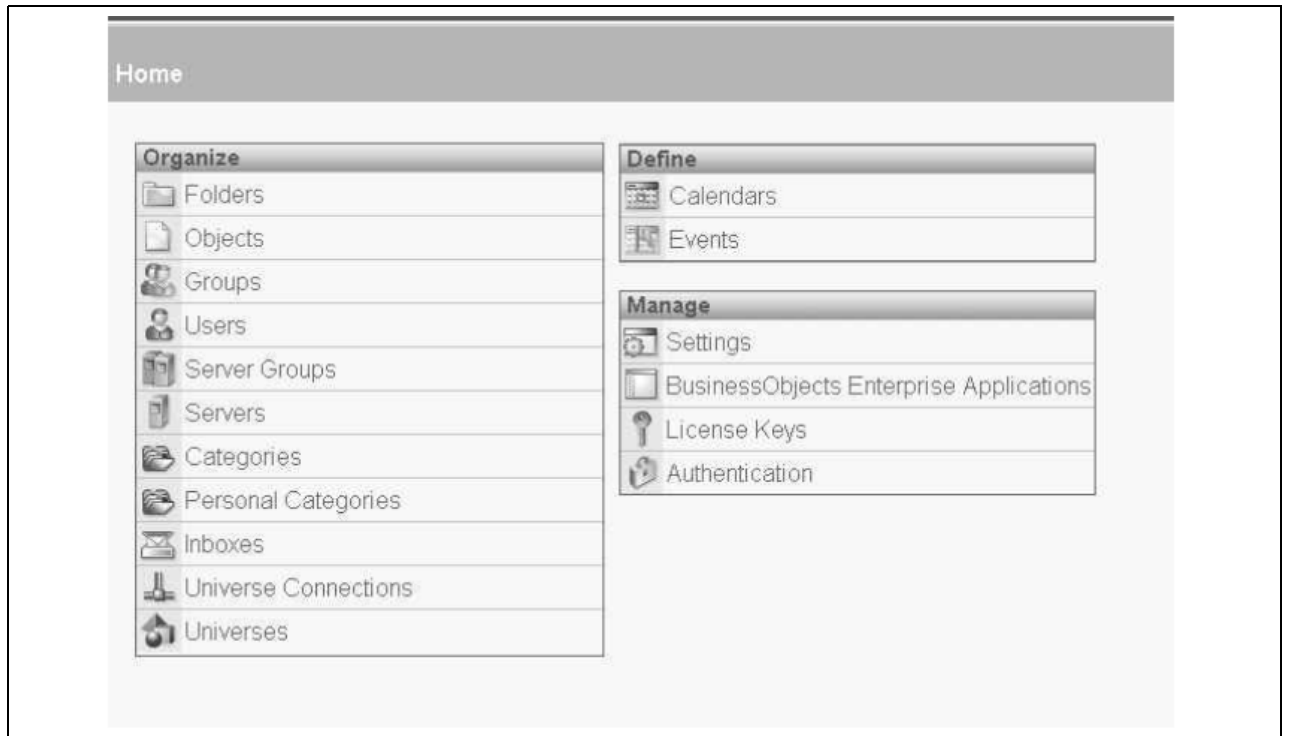
---

2. Log on with *administrator* and no password.



Central Management Console log on

3. Click License Keys.



CMC Home page

4. Enter the following license keys:

B1W60 080084G 3SM5U40 0J51 (1 Named User)

B1W60 G81084G 3S4PD20 0YD1 (5 User Concurrent Access)

---

**Note.** As concurrent users access the system to view reports, you may find that the five user concurrent access license is insufficient. If you need more concurrent access licenses, please contact the Oracle Global Support Center for assistance in securing additional licenses.

---

**BusinessObjects Enterprise Professional Version**

Currently held license keys (Select a key to see its licensing information)

Add Key

**B1W60-G81084G-3S4PD20-0YD1 (Product code)**

(Changes take effect immediately - on click of Add or Delete)

**'BusinessObjects Enterprise Professional Version' License Key Information**

|                   | Selected Key                   | Total Licenses                 |
|-------------------|--------------------------------|--------------------------------|
| Named Users:      | <input type="text" value="-"/> | <input type="text" value="0"/> |
| Concurrent Users: | <input type="text" value="5"/> | <input type="text" value="5"/> |
| Processors:       | <input type="text" value="-"/> | <input type="text" value="0"/> |
| Expires:          | <input type="text" value="-"/> |                                |

Entering license keys

- Click Go to return to the home page.

## Task 11-8: Converting Crystal Reports

This section discusses:

- Selecting the Crystal Reports Conversion Method
- Converting pre-PeopleTools 8 Crystal Reports to PeopleTools 8 Crystal Reports
- Converting Reports from Crystal Reports 9 Format to Crystal Reports XI Format

### Selecting the Crystal Reports Conversion Method

This section includes information on converting from Crystal Reports to various formats. You will fall into one of the following scenarios:

- *Scenario 1:*

You are upgrading your PeopleSoft installation to run on PeopleTools 8 and you do not plan to use BusinessObjects Enterprise XI. You will use the Windows-based Crystal Report Print Engine packaged with PeopleTools instead.



You will have to run a conversion program to convert your Crystal reports so that they can run on PeopleTools 8.

See Converting pre-PeopleTools 8 Crystal Reports to PeopleTools 8 Crystal Reports.

- *Scenario 2:*

Your PeopleSoft installation is already running on PeopleTools 8 and you want to run your Crystal reports using BusinessObjects Enterprise XI.

You will have to convert your reports from Crystal 9 format to Crystal XI format.

See Converting Reports from Crystal Reports 9 Format to Crystal Reports XI Format.

- *Scenario 3:*

You are upgrading your PeopleSoft installation to run on PeopleTools 8.49 from a pre-PeopleTools 8 environment and plan to use BusinessObjects Enterprise XI.

You will have to:

- first run a conversion program to convert your Crystal reports so that they can run on PeopleTools 8;
- then run the conversion program that will convert them from Crystal 9 format to Crystal 11 format.

See the section Converting pre-PeopleTools 8 Crystal Reports to PeopleTools 8 Crystal Reports.

Then see the section Converting Reports from Crystal Reports 9 format to Crystal Reports XI format.

- *Scenario 4:*

You are upgrading your PeopleSoft installation and are already running your reports on BusinessObjects Enterprise XI.

No report conversion is necessary.

## **Task 11-8-1: Converting pre-PeopleTools 8 Crystal Reports to PeopleTools 8 Crystal Reports**

This section discusses:

- Understanding the PeopleTools RPT Conversion Utility
- Converting RPT Files
- Repairing RPT Files

### **Understanding the PeopleTools RPT Conversion Utility**

The PeopleTools RPT Conversion utility is a standalone program that converts your .rpt files from the format PeopleSoft used in previous releases to the PeopleTools 8 format. You only need to run this program if you are upgrading from previous versions of PeopleTools. This section discusses how to:

- Convert .rpt files
- Repair .rpt files

See the PeopleSoft upgrade guide for your platform.

### **Converting RPT Files**

Before you run the PeopleSoft RPT Conversion utility, you should move your report files to a specific directory. You can then point the conversion utility to that directory.

---

**Note.** You should also back up your report files. If any problem occurs while you run this program, your report files may become corrupted.

---

To run the conversion:

1. Select Start, Programs, PeopleSoft 8, PeopleTools RPT Converter.  
Alternatively, run `pscvtrpt.exe` from `<PS_HOME>\bin\client\winx86`.
2. Accept the default directory or browse to select a new directory.  
The Selected Report directory default is the location of your Crystal Reports as specified in the Configuration Manager. If you wish to convert files in a different location, select the new directory.
3. Select the check box Convert RPT files in subdirectories.  
The database information is automatically removed from older reports that are converted. After the conversion, reports that were successfully converted appear in the Files Converted list box.
4. Select Convert.  
If you have not signed into the PeopleSoft database, you are prompted to do so. After you successfully sign into a database, you can see a progress window.
5. At the prompt “Successful conversion of *x* files. Skipped *x* files,” click OK.  
When the conversion is complete, a Close button is enabled.
6. Select Close.  
Before closing, take note of any .rpt files that failed to convert. This is usually due to read only access.

## Repairing RPT Files

You can use the RPT Conversion utility when you are experiencing problems with a report that has already been converted as part of the upgrade procedure.

---

**Note.** Select the Run Verify Database option first. If the problem is still not resolved, select the Remove database info from current Crystal reports option.

---

To repair RPT files:

1. Select Start, Programs, PeopleSoft 8, PeopleTools RPT Converter.
2. Accept the default directory or browse to select a different directory.  
The Selected Report directory default is the location of your Crystal Reports as specified in the Configuration Manager. If you wish to repair files in a different location, select the new directory.
3. Select either the Run Verify Database or the Remove database info from current Crystal reports check box.  
The Run Verify Database option verifies whether the query information saved in the report is in sync with the query definition.  
When it is complete, reports that were current and had the database information removed appear in the Files Converted list box, with a \* to the left of the report name.
4. Select Convert.  
A progress window appears.
5. At the prompt “Successful conversion of *x* files. Skipped *x* files,” click OK.

When the conversion is complete, a Close button is enabled.

6. Select Close.

Before closing, take note of any .rpt files that failed. This is usually due to read-only access.

## **Task 11-8-2: Converting Reports from Crystal Reports 9 Format to Crystal Reports XI Format**

This section discusses:

- Understanding the Conversion from Crystal Reports 9 to Crystal Reports XI
- Preparing for Conversion of Crystal 9 Reports
- Running the Conversion
- Verifying the Conversion and Publish
- Reviewing Common Conversion Errors and Warning Messages

### **Understanding the Conversion from Crystal Reports 9 to Crystal Reports XI**

The PeopleTools RPT Conversion utility pscrconv.exe is a program that converts your Crystal Reports .rpt files from the format that PeopleSoft used in previous PeopleTools 8.x releases to the PeopleTools 8.49 format for use with Crystal Reports XI. This utility also publishes the converted Crystal Reports files by moving them into the BusinessObjects Enterprise Repository so that they can run in the PeopleSoft database.

---

**Note.** The PeopleTools RPT Conversion Utility is not intended to be run on reports with non-PeopleSoft data sources.

---

#### *Overview of the Conversion and Publish Processes*

There are two key processes:

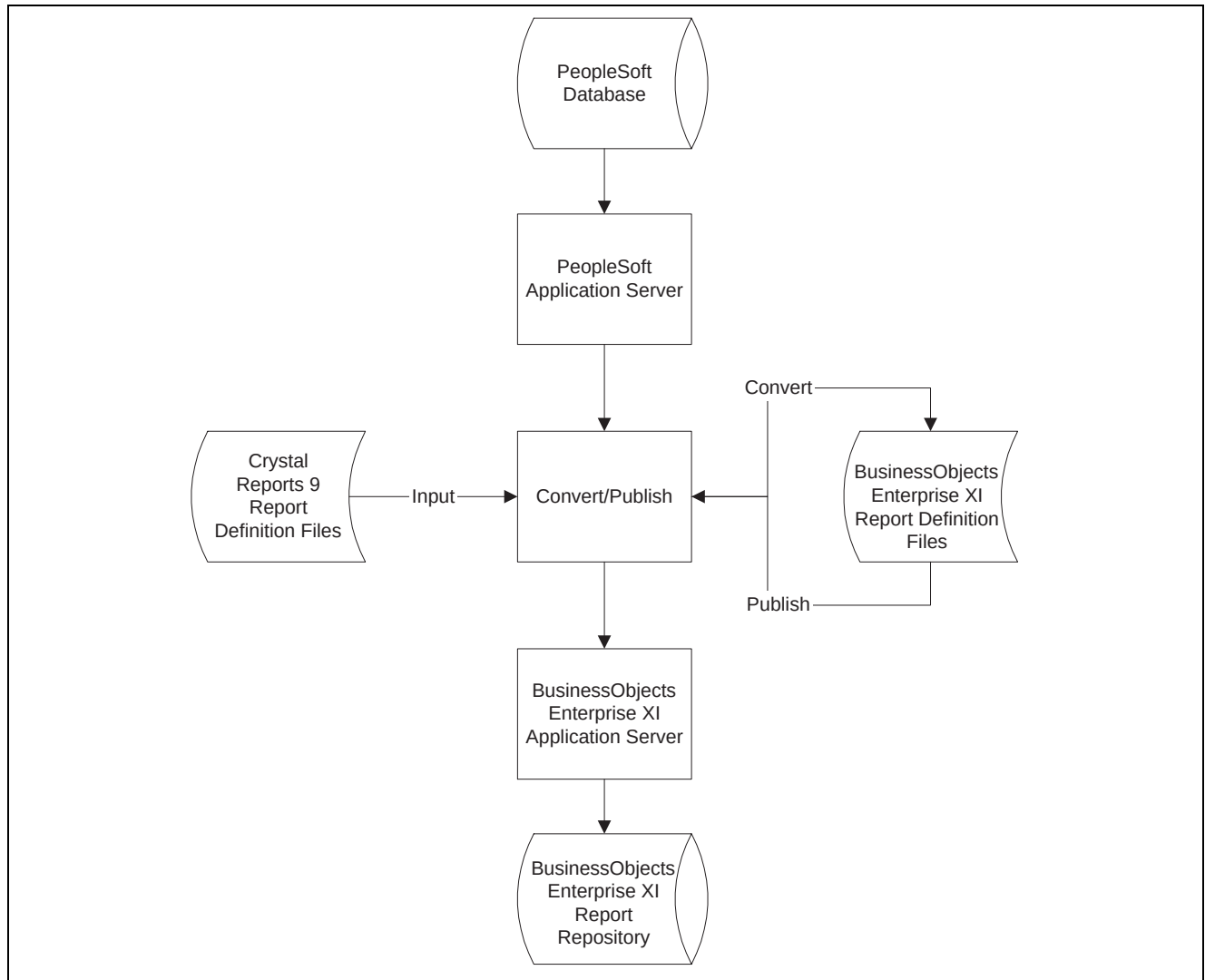
- Converting report definition files from Crystal 9 format to Crystal XI format
- Publishing Crystal XI report definition files into the BusinessObjects Enterprise XI Report Repository

In order to run reports using BusinessObjects Enterprise XI through PeopleSoft, the Crystal Reports XI report definitions must reside in the BusinessObjects Enterprise XI Report Repository.

You can perform each process individually or both together. Here are some examples that might make this clear:

- In a development environment you might run convert and publish together to populate your development environment.
- In a test environment you may want to run the conversion by itself, and then run the publish process multiple times in order to publish the same reports to different test environments.

Here is a diagram that illustrates conversion and publishing:



PeopleTools conversion or publish process

*Understanding Report Conversion*

The conversion process performs the following:

- Prompts the user for inputs:
  - PeopleSoft sign-on information
  - The action that they would like to take
  - Source folder with Crystal Reports 9 report definition files
  - Destination folder for Crystal Reports XI report definition files
- For each report to be converted in the source folder the program:
  - Reads a Crystal 9 report from a folder
  - Runs a Verify Database on that report
  - Removes database information from the report definition and verifies whether the query information saved in the reports is in sync with their query definitions.

- For every field on the report the program determines the name by which QAS recognizes it.

The program identifies all the possible field names that could be used in a report (as either a selected field, parameter field, expression field) and then provides the name QAS will use for those same fields.

- Calls a Business Objects-supplied conversion routine to convert report definition contents from Crystal 9 format to Crystal XI format
- Runs a Verify Database on the converted report definition

### *Understanding Report Publishing*

Report publishing can be accomplished by:

- Publishing reports automatically after converting them
- Publishing reports in a separate execution of the program

If you are publishing Crystal XI report files for the first time to the BusinessObjects Enterprise XI Report Repository for a PeopleSoft database, folders are created in the BusinessObjects Enterprise XI Repository under the database name. Report definitions must be published for each PeopleSoft database for which you plan to run reports. Published report definitions cannot be shared across databases. BusinessObjects Enterprise XI security on these folders is set with full access granted to the BusinessObject Enterprise Administrative User (BOE\_Admin) identified on the PeopleTools, Query Access Services, Configure, BusinessObject Enterprise page. Read access is granted to individual users.

The publish process:

- Requires login information for the administrative PeopleSoft user (user BOE\_Admin)
- Requires as input the user for the source folder with Crystal XI reports
- Stores (publishes) the converted report in the BusinessObjects Enterprise XI Report Repository
- Updates information in the PeopleSoft Report Manager so that the Report Manager is aware of the report definitions in the BusinessObjects Enterprise XI Report Repository

---

**Note.** If you publish a report that has been previously published to the BusinessObjects Enterprise XI Repository for a PeopleSoft database, the earlier version will be overwritten.

---

In order to successfully convert and publish you must have the following environment in place:

- A properly installed BusinessObjects Enterprise XI server
- A properly installed PeopleSoft application (database and application server)
- Integration between the PeopleSoft application and the BusinessObjects Enterprise XI server properly installed and configured
- A designated machine on which you will run the conversion program

See the PeopleSoft upgrade guide for your platform.

## **Preparing for Conversion of Crystal 9 Reports**

Before running the conversion, there are several steps you must complete.

To prepare the conversion workstation:

1. Confirm the Operating System of the workstation.

The conversion program must be run on a machine that is running Windows 2000, Windows Server 2003, or Windows XP.

2. Confirm access to the PeopleSoft application.

The workstation must have connectivity to the PeopleSoft application (that is, you can log on to the application through the PeopleSoft logon page).

3. Confirm access to the BusinessObjects Enterprise XI application.

The workstation must have connectivity to the BusinessObjects Enterprise XI application. Users can verify connectivity by bringing up the BusinessObjects Enterprise XI server CMC (management console) on the workstation.

4. Confirm that the win32\_x86 path is included in the PATH env variable of the workstation.

5. Install PeopleTools on the workstation.

The way to install the conversion program on the conversion workstation is to simply install PeopleTools on the workstation. PSCRCONV.EXE is one of the files installed on the machine.

6. Install Crystal Reports XI on the workstation.

Install the latest version of Crystal Reports XI and any hotfixes. Crystal Reports XI will install certain dynamic link libraries that are required for the installation program.

7. Perform a PeopleTools Workstation Installation on the workstation.

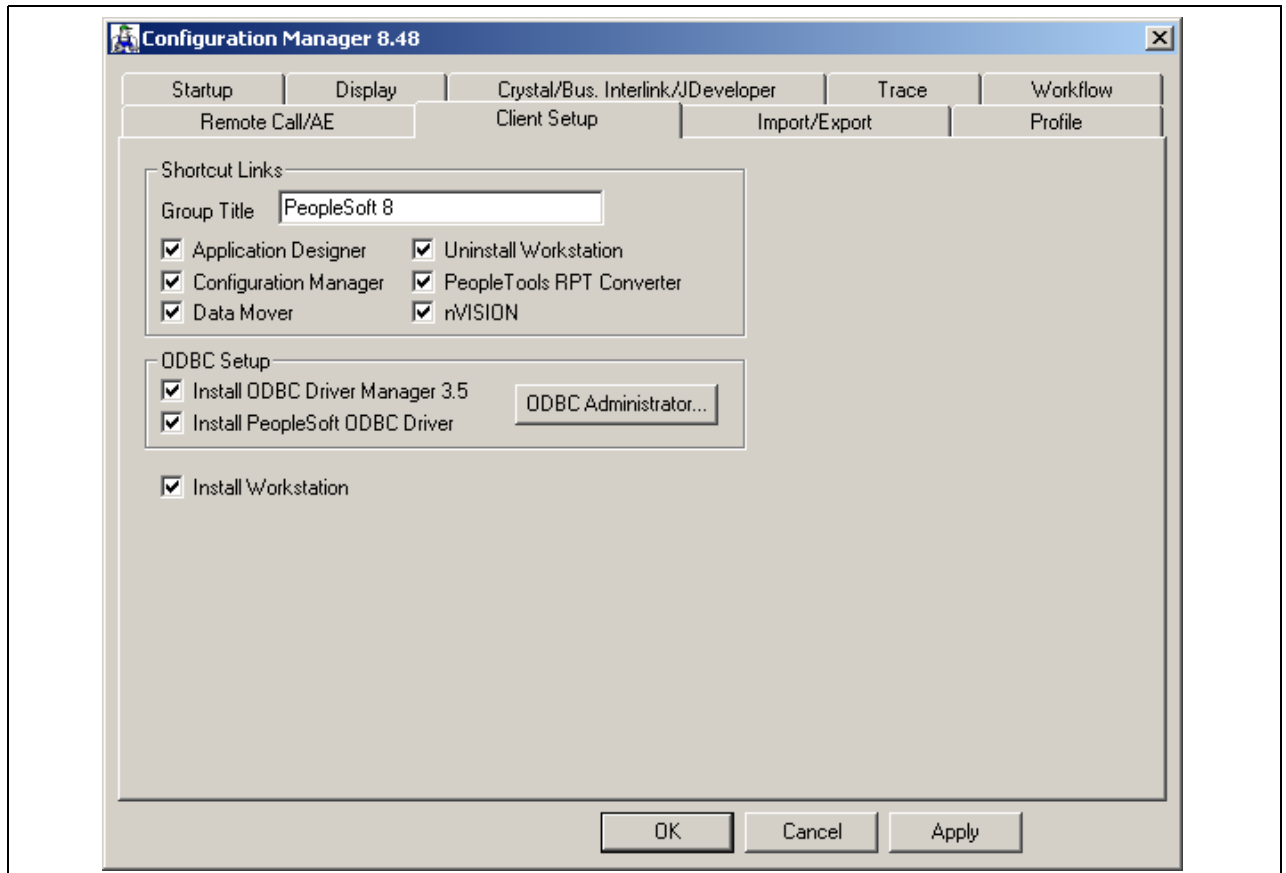
The conversion program (specifically, the portion of the conversion program supplied by Business Objects), performs a “Verify Database” on each Crystal 9 report definition to be converted. “Verify Database” requires the PeopleSoft ODBC driver. PeopleSoft ODBC driver requires the PeopleTools workstation installation in order to remove the pipe character ‘|’ which would otherwise cause the Crystal Report XI report resulting from conversion to fail creation within BusinessObjects Enterprise XI environment.

Do this by navigating to Start, Programs, PeopleSoft 8, Configuration Manager and selecting the Client Setup tab. Alternatively, run `pscfg.exe` from `<PS_HOME>\bin\client\winx86`.

8. Install PSODBC on the Workstation.

PSODBC provides connectivity between Crystal 9 reports and the PeopleSoft application database.

The PSODBC ODBC driver can be installed by navigating to Start, Programs, PeopleSoft 8, Configuration Manager and selecting the Client Setup tab. Alternatively, run `pscfg.exe` from `<PS_HOME>\bin\client\winx86`.



PeopleSoft Configuration Manager Client Setup tab

To confirm the PeopleSoft Application environment:

1. Confirm the application version of the database and application version of the Crystal 9 Reports.

The PeopleSoft database that you have must be associated with the Crystal 9 reports that you want to convert. That is, the database must have the queries that the Crystal 9 reports access. And the application version of the database must match the application version of the reports that you plan to convert.

2. Verify that the user that will convert the reports has Query access for all the reports that you are planning to convert.

The simplest way to do this is to assign user BOE\_Admin the “PeopleSoft Administrator” role. That role allows the user access to run all queries. To assign this role to BOE\_Admin:

- a. Log onto PIA and navigate to PeopleTools, Security, User Profiles.
- b. Open the User Profile for BOE\_Admin and go to the “Roles” tab.
- c. If not already present in the list of Roles, add Role “PeopleSoft Administrator” to the roles assigned to BOE\_Admin and save the page.

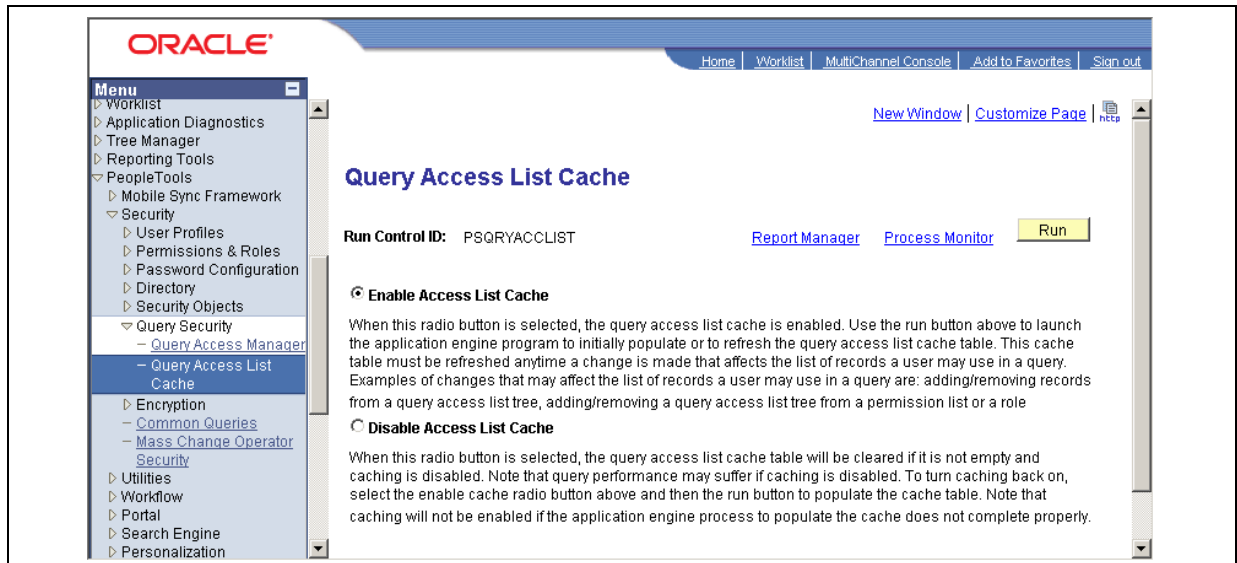
---

**Note.** The PeopleSoft Administrator Role should be removed from BOE\_Admin as soon as you are done converting reports to minimize security concerns.

---

- d. Run the process to update the Query Access List Cache.

Select PeopleTools, Security, Query Security, Query Access List Cache. On the Query Access List Cache page, verify that the radio button Enable Access List Cache is selected, and click the Run button to run the process.



Query Access List Cache page

- e. If you do not want to assign the PeopleSoft Administrator Role to user BOE\_Admin, there are two options:

Run the conversion by running the conversion program logged on as a PeopleSoft user who does have the “PeopleSoft Administrator” role assigned to it.

or

Manually assign query security to user BOE\_Admin such that BOE\_Admin has security access to all queries used in Crystal reports. This can be time consuming and error prone, however.

3. Confirm the integrity of the PeopleSoft application database.

Verify the integrity of the PeopleSoft application database by running SYSAUDIT.SQR on the database. In particular, there should be no anomalies in the database as regards Query definitions (SysQuery-01 through SysQuery-26). For more information on SYSAUDIT.SQR refer to *Enterprise PeopleTools 8.49 PeopleBook: Data Management*.

4. Turn logging levels to low.

Excessive logging will slow the conversion process. Make sure that you have logging for the application server, PeopleCode, SQL, and Integration Broker set to Low levels. If you experience problems while executing the conversion process, you can selectively increase logging to get better diagnostic information.

5. Confirm your BusinessObjects Enterprise XI environment and integration with PeopleSoft.

The conversion program relies on having a properly installed and configured BusinessObjects Enterprise XI so that the converted report definitions can be inserted in the BusinessObjects Enterprise XI repository. There are no special steps in this section that are not part of the basic installation steps covered elsewhere in this installation guide.

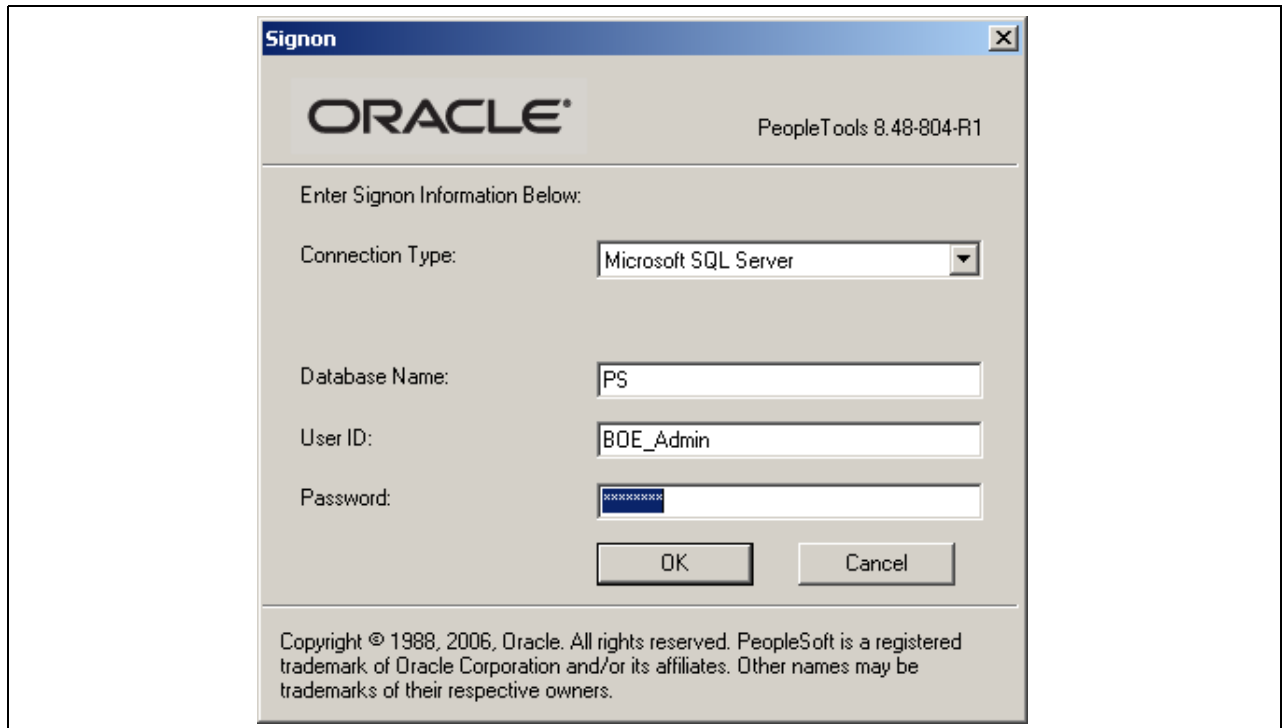
## Running the Conversion

To run the conversion:

1. Run `pscrconv.exe` from `<PS_HOME>\bin\client\winx86` directory.
2. Sign into the PeopleSoft database, if you have not already done so. Log in as user BOE\_Admin.

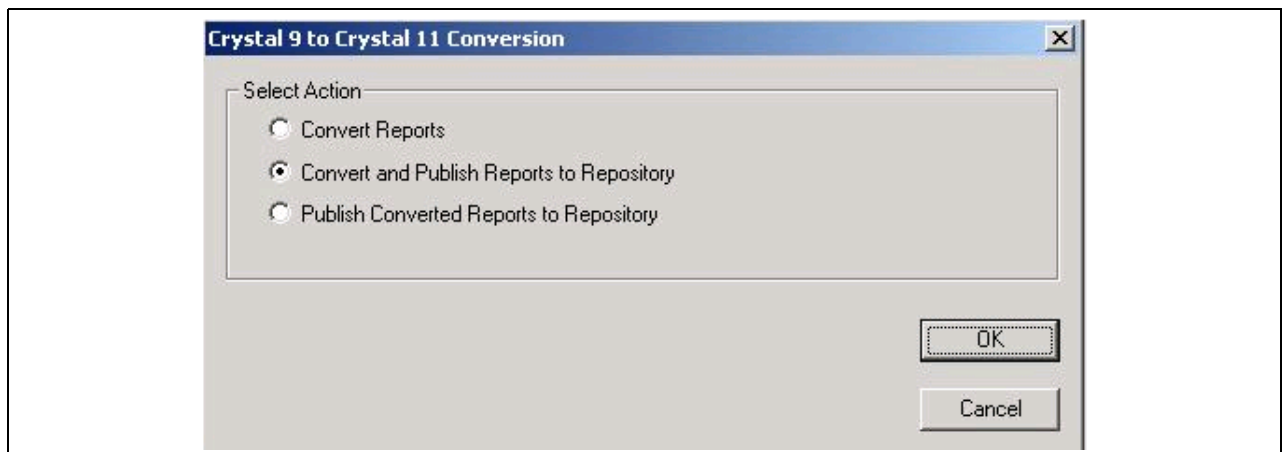
Ensure that log into the correct database for the reports that you are converting. For example, do not sign into a Human Resources database if the reports were created against a Financials database.





PeopleSoft database signon dialog box

3. Choose the action that you wish to perform.



Crystal 9 to Crystal 11 Conversion window

- Converting reports without publishing them to the BusinessObjects Enterprise XI report repository allows you to go from running Crystal Reports 9 report definitions to running Crystal Reports XI report definitions using Crystal Reports XI on a client machine. The converted reports will be stored in a directory that you specify a little later. Converting without publishing is useful in a demonstration environment where you wish to publish reports to a production or development environment at a later time.
- Converting reports and publishing them to the BusinessObjects Enterprise XI report repository allows you to go from running Crystal Reports 9 report definitions to running Crystal Reports XI report definitions using BusinessObjects Enterprise XI via the PeopleSoft Process Scheduler.
- If you choose to Publish Reports to the repository, you are publishing to the Report Repository report definitions that have already been converted to Crystal Reports XI format.

4. Select a report input directory and click OK.

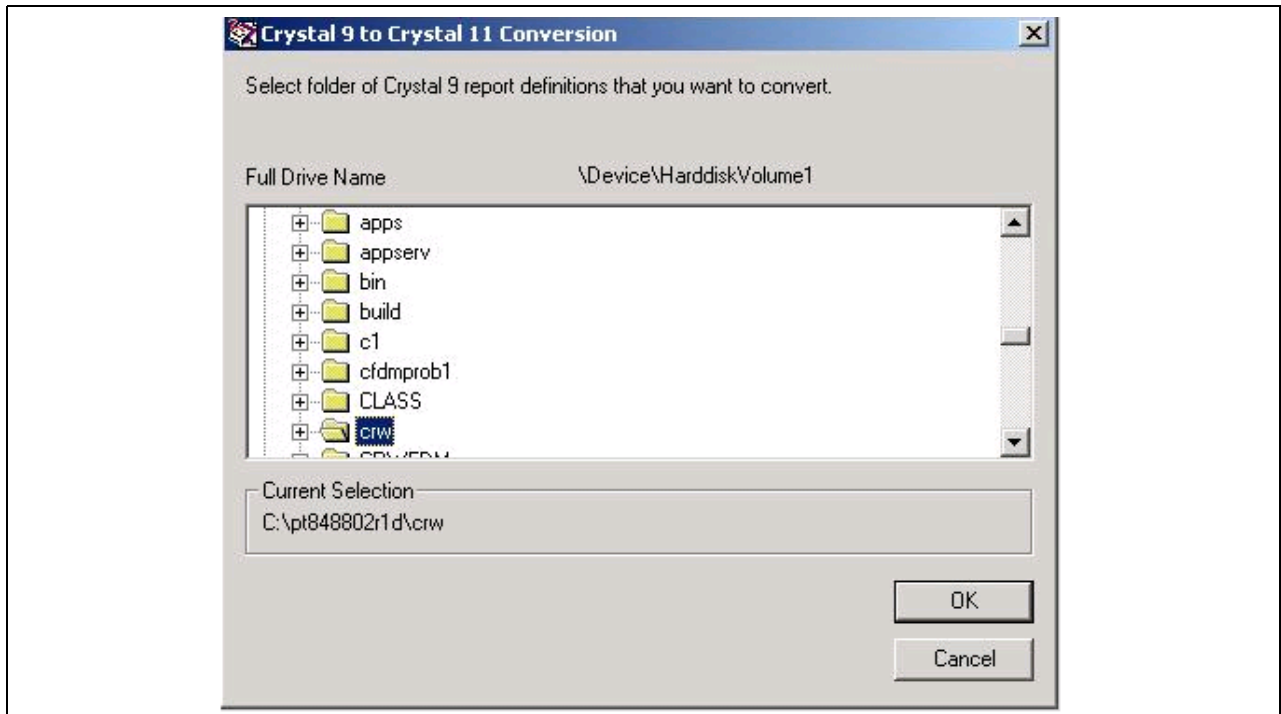
The report input directory must contain a subdirectory that is identified by a language code; the reports to be converted reside in this subdirectory.

---

**Note.** If you chose the Publish Converted Reports to Repository process option in the previous step, you do not see this dialog box.

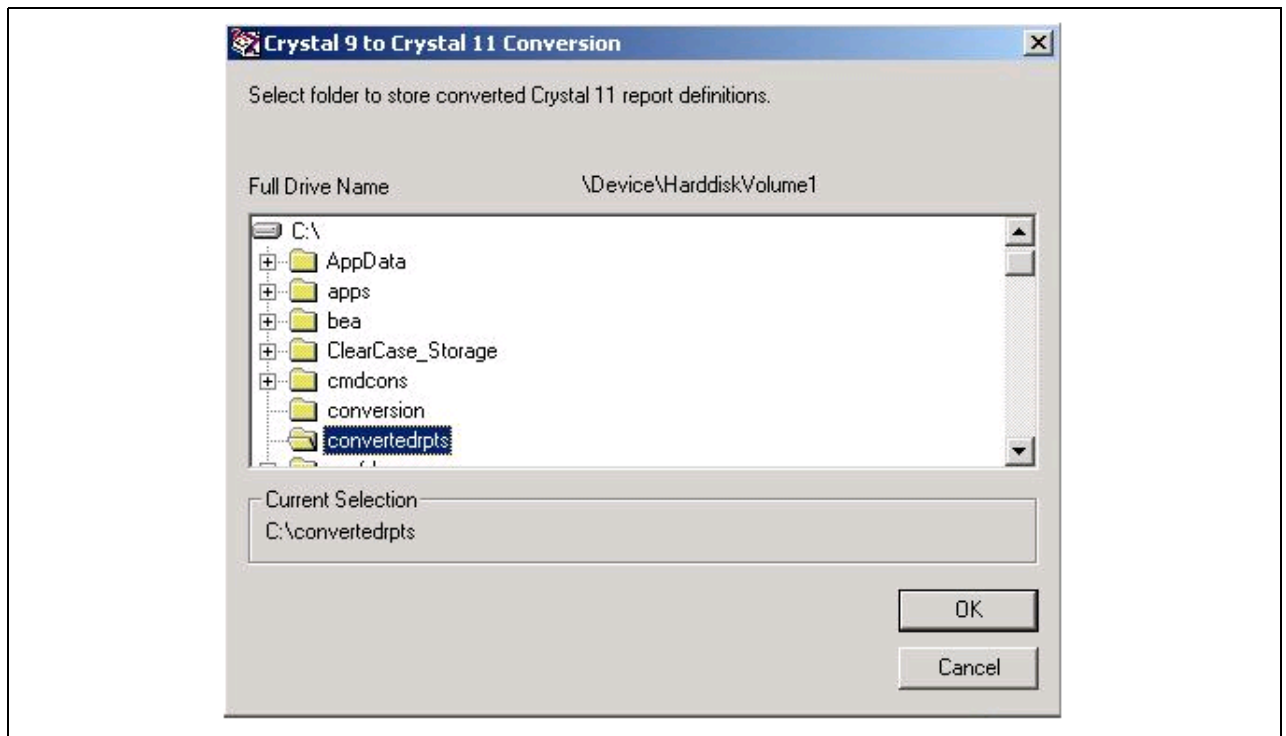
---

For example, select C:\PT849\CRW if the reports to be converted are located in C:\PT849\CRW\ENG.



Directory selection for the Crystal 9 to Crystal 11 Conversion

5. Select a report output directory for the converted reports and click OK.



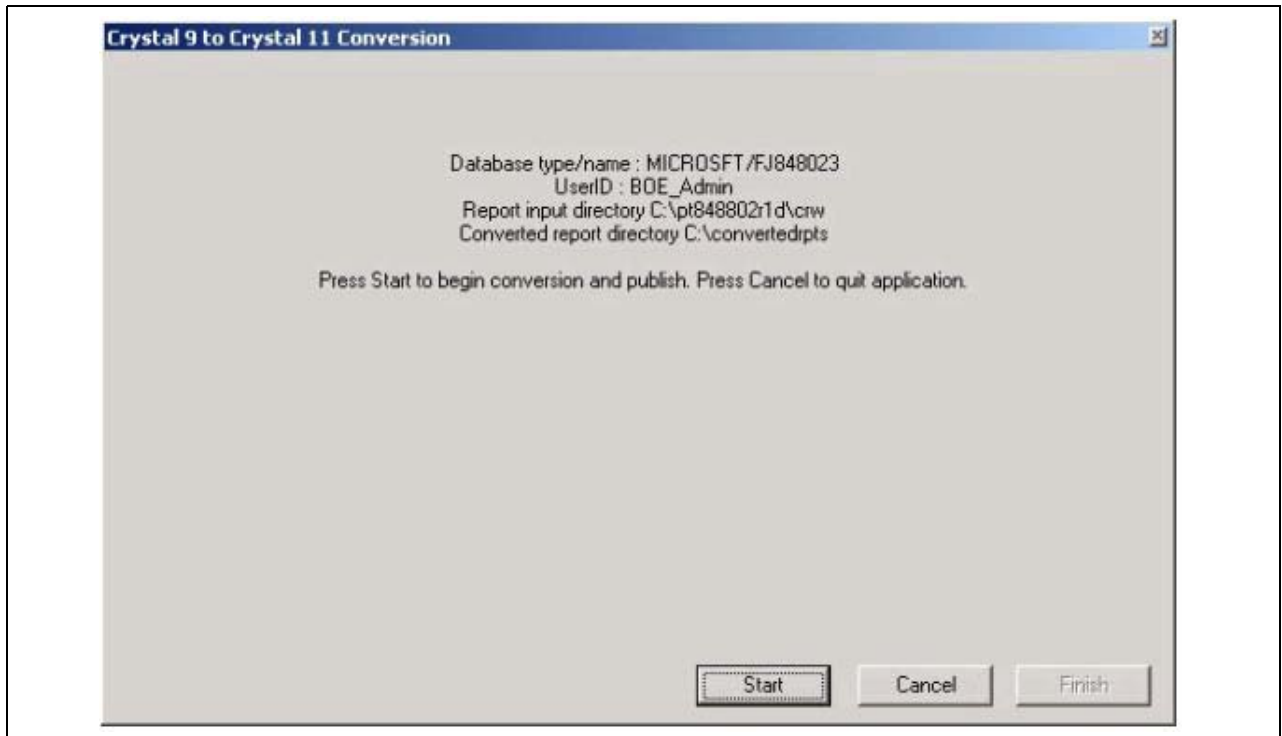
Output directory for Crystal 9 to Crystal 11 Conversion

This can be any writable folder, however it cannot be a subfolder of the report input directory. For example, if the reports to be converted are located in C:\PT849\CRW\ENG, the report output directory cannot be C:\PT849\CRW\NEW.

The conversion program will create an appropriate language subdirectory in which the converted reports will be placed. Therefore, if you want your converted reports to be placed in C:\PT849\Converted\ENG, enter C:\PT849\Converted as the report output directory.

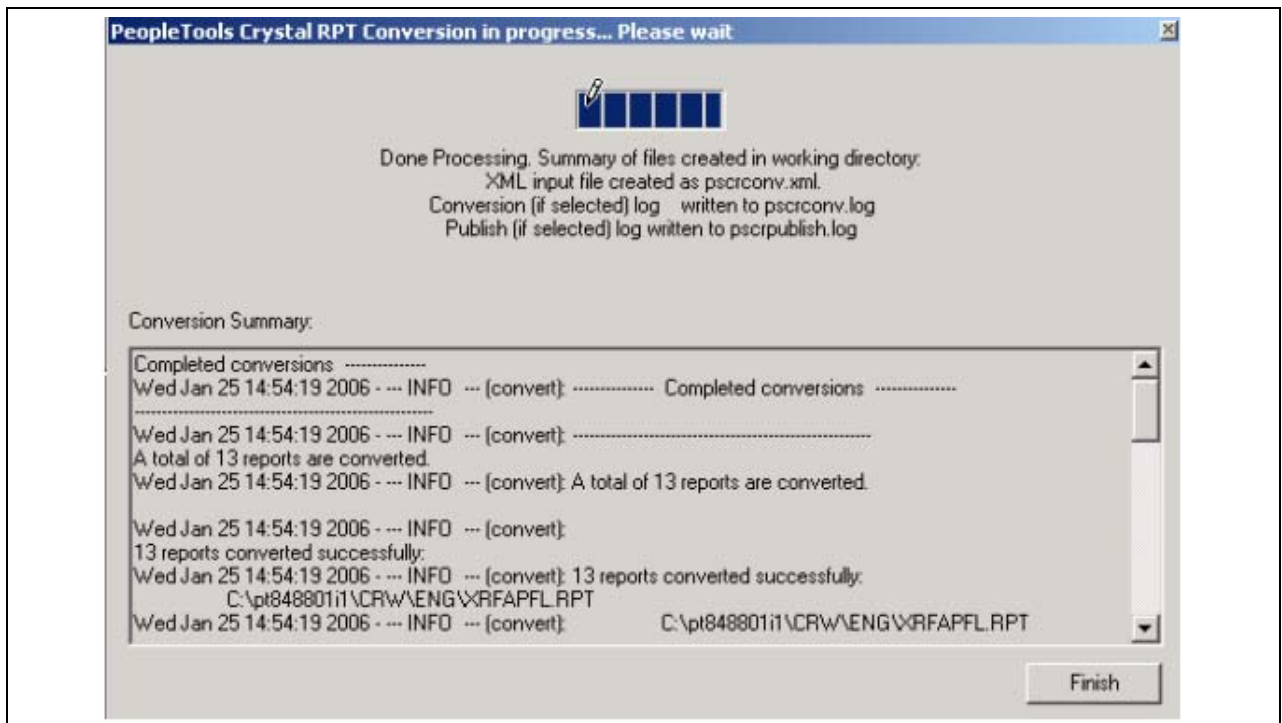
6. Review the information on the summary screen.

If all looks good, click the Start button to begin the process. Clicking Cancel will cause you to exit from the program.



Summary information for Crystal 9 to Crystal 11 Conversion

A window appears indicating that the conversion is processing. Once the process is complete, a summary details information about the execution. This information is also written to the <PS\_HOME>\bin\client\winx86\pscrconvsum.log file.



Progress indicator for Crystal 9 to Crystal 11 Conversion

7. Click the Finish button.

## Verifying the Conversion and Publish

Use these steps to verify that your reports converted properly are:

1. Review the conversion logs.

Two log files are generated every time the conversion is run.

**PSCRCONVSUM.LOG**      the summary log

**PSCRCONV.LOG**          the detailed log

These files will be found in the working folder (generally this will be your \client\bin folder).

---

**Note.** These files will be overwritten each time you run the conversion program. If you want to save the logs from a previous run, rename them before you run the process.

---

The log files will contain information about the conversion for all reports that you submitted for conversion in that execution of the conversion program.

- a. Review the Summary conversion log, PSCRCONVSUM.LOG.

The fastest way is to search the summary log for “Error” and “Warn”. If no reports had error or warnings then the conversion was successful. If an error or warning condition is indicated on the summary log, proceed to the next step to check the detailed log.

Here is a sample summary conversion log:

```
Completed conversions -----
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): ----- =>
Completed conversions -----

Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): -----=>
=>
=>
=>
=>
=>
=>

A total of 13 reports are converted.
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): A total of 13 reports=>
are converted.

Fri Jan 20 13:24:31 2006 - --- INFO --- (convert):
13 reports converted successfully:
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): 13 reports converted=>
successfully:
C:\pt849801i1\CRW\ENG\XRFAPFL.RPT
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): C:\pt849801i1\CRW\ENG=>
\XRFAPFL.RPT
C:\pt849801i1\CRW\ENG\XRFFLPC.RPT
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): C:\pt849801i1\CRW\ENG=>
\XRFFLPC.RPT
C:\pt849801i1\CRW\ENG\XRFFLPN.RPT
```

```

Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): C:\pt849801i1\CRW\ENG⇒
\XRFFLPN.RPT
C:\pt849801i1\CRW\ENG\XRFFLRC.RPT
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): C:\pt849801i1\CRW\ENG⇒
\XRFFLRC.RPT
C:\pt849801i1\CRW\ENG\XRFIELDSD.RPT
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): C:\pt849801i1\CRW\ENG⇒
\XRFIELDSD.RPT
C:\pt849801i1\CRW\ENG\XRFMENU.RPT
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): C:\pt849801i1\CRW\ENG⇒
\XRFMENU.RPT
C:\pt849801i1\CRW\ENG\XRFPANEL.RPT
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): C:\pt849801i1\CRW\ENG⇒
\XRFPANEL.RPT
C:\pt849801i1\CRW\ENG\XRFPFCFL.RPT
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): C:\pt849801i1\CRW\ENG⇒
\XRFPFCFL.RPT
C:\pt849801i1\CRW\ENG\XRFPNPC.RPT
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): C:\pt849801i1\CRW\ENG⇒
\XRFPNPC.RPT
C:\pt849801i1\CRW\ENG\XRFRFCFL.RPT
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): C:\pt849801i1\CRW\ENG⇒
\XRFRFCFL.RPT
C:\pt849801i1\CRW\ENG\XRFRFCPN.RPT
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): C:\pt849801i1\CRW\ENG⇒
\XRFRFCPN.RPT
C:\pt849801i1\CRW\ENG\XRFWIN.RPT
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): C:\pt849801i1\CRW\ENG⇒
\XRFWIN.RPT
C:\pt849801i1\CRW\ENG\XRFWNFL.RPT
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): C:\pt849801i1\CRW\ENG⇒
\XRFWNFL.RPT
0 reports converted with warnings:
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): 0 reports converted with⇒
warnings:
0 reports failed to convert:
Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): 0 reports failed to⇒
convert:

Fri Jan 20 13:24:31 2006 - --- INFO --- (convert):

Fri Jan 20 13:24:31 2006 - --- INFO --- (convert): -----⇒
⇒
⇒
⇒
⇒
⇒
⇒

```

b. If necessary review the detailed conversion log, PSCRCONV.LOG

It is not necessary to perform this step if the summary conversion log indicates that all reports converted successfully.

The detailed log contains three types of messages:

INFO  
WARN  
ERROR

You need to eliminate all ERROR messages. The best policy is to understand why all WARN messages are generated and eliminate them if you can.

Here's a portion of the detailed log that illustrates a successfully converted report:

```
...
...
Converting the report "C:\pt849801i1\CRW\ENG\XRFAPFL.RPT".
Fri Jan 20 13:29:46 2006 - --- INFO --- (convert): Converting the report "C:⇒
⇒
⇒
⇒
⇒
⇒
\pt849801i1\CRW\ENG\XRFAPFL.RPT".
Fri Jan 20 13:29:46 2006 - --- INFO --- (verify): Verifying the report⇒
before conversion.
Fri Jan 20 13:29:46 2006 - --- INFO --- (verify): Successfully verified⇒
the report.
Fri Jan 20 13:29:50 2006 - --- INFO --- (convert): Successfully converted⇒
report "C:\pt849801i1\CRW\ENG\XRFAPFL.RPT" to target "c:\cnew\ENG⇒
\XRFAPFL.RPT".
...
...
```

If a report has one or more ERROR messages associated with it, it failed conversion. If a report has only WARN and INFO messages associated with it, it passed conversion and will run. The WARN messages may indicate some changes you may want to make to the report definition.

See *Reviewing Common Conversion Errors and Warning Messages*.

2. Re-run the conversion on the altered reports

After you have made changes to address the ERRORS and WARNs, re-run the conversion program. You should exclude from this execution of the conversion program any reports that were successfully converted in prior executions.

3. Verify report publishing.

To verify that the reports published properly, launch the BusinessObjects Enterprise XI Admin Console (on Infoview) and locate the shared folder with the database name you used to publish. Ensure that the number of reports with the datetime of the Publish process matches the number of Crystal Reports XI report definition files that you wanted to publish.

4. Run the converted reports.

For final verification that the reports you converted are correct, you should run the converted reports and compare their output to their unconverted (that is, Crystal 9) counterparts. You should compare them for equivalent layouts and equivalent data.

To run the report in BusinessObjects Enterprise XI InfoView:

- a. Log onto BusinessObjects Enterprise XI Infoview with user BOE\_Admin.
- b. Use search edit box at top to find the report that you want to run.
- c. In the search results choose the report.
- d. Enter report parameters, if any, and the report displays.

## Reviewing Common Conversion Errors and Warning Messages

Here are some conversion errors that you may encounter as you convert your reports. For each we suggest possible ways to address the problem.

- **ERROR** — Failed to update the data source of table *[datasource(table name)]* to QUERY.*[query name]*

For example:

```
Converting the report "C:\M\CRWFD\ENG\FORA003-.RPT".
Fri Jan 13 18:10:00 2006 - --- INFO --- (convert): Converting the report "C:\M\
\CRWFD\ENG\FORA003-.RPT".
Fri Jan 13 18:10:00 2006 - --- INFO --- (verify): Verifying the report before⇒
conversion.
Fri Jan 13 18:10:00 2006 - --- INFO --- (verify): Successfully verified the⇒
report.
Fri Jan 13 18:10:01 2006 - --- ERROR --- (convert): Failed to update the data⇒
source of table EB_EAB(EB_EAB_GEN0) to QUERY.EB_EAB.
```

Things to check:

- Does the offending query exist in the database?
- Does the PeopleSoft user doing the conversion (that is, the PeopleSoft user that you provided to the conversion program) have security in the PeopleSoft database to access the query?
- **WARN** — Encountered a duplicate table *[table name]*. Skipping element.

WARN — Encountered an element "field" within an invalid "table" element. Skipping element.

For example:

```
Thu Jan 19 11:07:29 2006 - --- INFO --- (parse): -----⇒
⇒
⇒
⇒
⇒
⇒

Thu Jan 19 11:07:29 2006 - --- INFO --- (parse): ----- Reading⇒
command file -----
Thu Jan 19 11:07:29 2006 - --- INFO --- (parse): -----⇒
⇒
```



```

=>
=>
=>
=>
=>

Thu Jan 19 11:07:29 2006 - --- INFO --- (parse): Parse commands from file=>
pscrconv.xml
Thu Jan 19 11:07:29 2006 - --- WARN --- (parse): Encountered a duplicate=>
table WFA0001_AVERAGES_BY_BP_WL. Skipping element.
Thu Jan 19 11:07:29 2006 - --- WARN --- (parse): Encountered an element=>
"field" within an invalid "table" element. Skipping element.
Thu Jan 19 11:07:29 2006 - --- WARN --- (parse): Encountered an element=>
"field" within an invalid "table" element. Skipping element.
Thu Jan 19 11:07:29 2006 - --- WARN --- (parse): Encountered an element=>
"field" within an invalid "table" element. Skipping element

```

These two warnings are often seen together. They can be generated when two reports being converted in the same execution of the conversion program use the same query.

There is no need to take action on these warnings.



## CHAPTER 12

# Compiling COBOL on Windows

This chapter discusses:

- Understanding COBOL
- Prerequisites
- Compiling COBOL Source Files
- Distributing COBOL Binaries

---

## Understanding COBOL

This chapter describes how to compile and link PeopleSoft COBOL batch programs, if necessary.

COBOL is not needed for PeopleTools because the Process Scheduler has been re-written in C++. In addition, COBOL is not required for applications that contain no COBOL programs. See Supported Platforms on Customer Connection for the details on whether your application requires COBOL.

For information on how to navigate to the COBOL Requirements page, refer the following in this guide:

See “Preparing for Installation” Planning Your Initial Configuration

For more details about running COBOL in Unicode, consult the following.

See *Enterprise PeopleTools 8.49 PeopleBook: Global Technology*, “Running COBOL in a Unicode Environment.”

---

## Prerequisites

Before you attempt to run COBOL from the command line you should do the following:

- Make sure the variable PS\_SERVER\_CFG points to a valid psprcs.cfg file.
- For Windows systems, make sure %PS\_HOME%\bin\server\winx86 is in your path. It should appear before %PS\_HOME%\bin\client\winx86 if that also appears in the path.

---

## Task 12-1: Compiling COBOL Source Files

This section discusses:

- Understanding COBOL Compilation
- Compiling COBOL with CBLBLD.BAT
- Compiling COBOL with CBLMAKE.BAT
- Defining the GNT and INT Files

## Understanding COBOL Compilation

With PeopleTools 8.4, your COBOL always needs to be compiled on Windows. (This is a change from previous versions of PeopleTools, which delivered compiled COBOL for Windows.) This chapter assumes that you are carrying out the compile from your file server. (The COBOL compiler itself doesn't need to be on the file server, as long as the user can write to the file server and can link to the src and bin directories.) PeopleSoft's recommended approach is to use CBLBLD.BAT to compile all your COBOL at once. Another alternative is CBLMAKE.BAT, which you can use to compile selected COBOL files.

Make certain to check whether you need to apply any late-breaking patches.

See PeopleSoft Customer Connection, Updates and Fixes.

### Task 12-1-1: Compiling COBOL with CBLBLD.BAT

To compile COBOL with CBLBLD.BAT:

1. Set up two environment variables, PS\_HOME and COBROOT, on the machine from which you'll compile COBOL. (This should be either your file server or a machine that has access to your file server.) You can do this from a DOS command prompt window.

| Environment Variable | Purpose                                                                                                                                      |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| PS_HOME              | PeopleSoft home directory—that is, the drive letter and high-level PeopleSoft directory where you installed PeopleTools and the application. |
| COBROOT              | Drive letter and root directory of the COBOL compiler.                                                                                       |

For example, you could enter the following at the DOS command prompt:

```
set PS_HOME=C:\hr840
set COBROOT=c:\netexpress\base
```

2. Open a DOS command prompt window if you do not have one open already, and change directories to <PS\_HOME>\setup.
3. Execute CBLBLD.BAT as follows

```
cblbld <compile drive> <compile directory>
```

where <compile drive> is the drive where the compile takes place, <compile directory> is the temp directory where the compile takes place

The CBLBLD.BAT file will create the compile directory for you if it does not already exist.

---

**Note.** Make sure to include a space between the <compile drive> and <compile directory> parameters; they are treated as two different parameters within the CBLBLD.BAT batch program. Also ensure that you have write permission to <compile drive> and <compile directory> as the compile process will take place there.

---

For example, the following command will take the COBOL source from <PS\_HOME>\src\cbl and do the compile process under c:\temp\compile:

```
cblbld c: \temp\compile
```

Make note of the information that is displayed on the screen while the process is running; it provides the locations of important files that you will need to examine.

4. After you have successfully compiled your source code, all of the executables should have been placed in your <PS\_HOME>\CBLBINX directory (this directory will be named CBLBINA, CBLBINU, or CBLBINE, depending on whether you are using ANSI, Unicode or EBCDIC). Make sure that all of the files were copied correctly to this directory.
5. If the files were copied correctly, you can delete the entire temporary compile directory to free space on your disk drive.

---

**Note.** You may want to keep the files in the compile directory for testing purposes. Make sure that you have enough space on the drive where <compile directory> is located. Estimate about three times the amount in the <PS\_HOME>\CBLBINX directory.

---



---

**Note.** If you chose the Unicode option while running the PeopleSoft Installer, the file UNICODE.CFG was created in the setup directory. UNICODE.CFG automatically triggers the batch file CBL2UNI.BAT when you run CBLBLD.BAT. Another batch file, CBLRTCPY.BAT, copies four DLLs (CBLINTS.DLL, CBLRTSS.DLL, CBLVIOS.DLL, COB32API.DLL) from the Microfocus compiler directory (identified by %COBROOT% setting) into the appropriate CBLBIN directory (CBLBINA, CBLBINU, or CBLBINE) when you run CBLBLD. These files are needed for COBOL to run; they can reside anywhere as long as they are in the path. You can run either of these BAT files independently from the DOS command line (they reside in <PS\_HOME>\setup). For CBLRTCPY.BAT you need to specify a target directory.

---

## Task 12-1-2: Compiling COBOL with CBLMAKE.BAT

CBLBLD.BAT compiles all your COBOL at once, which can take a lot of time. CBLMAKE.BAT, in contrast, lets you employ one or more parameters to compile a specific COBOL file or a selected group of COBOL files. Unlike CBLBLD.BAT, however, CBLMAKE.BAT does not automatically trigger the batch file CBL2UNI.BAT or CBLRTCPY.BAT.

Here is the basic syntax for CBLMAKE.BAT:

```
CBLMAKE.BAT [] [ALL] [wildcard filename[ALL]] [wildcard filename | wildcard⇒
filename without extension[INT | GNT | EXE]] [EBCDIC] [LIST]
```

---

**Note.** The switches are well documented in the CBLMAKE.BAT file in the form of comments.

---



---

**Note.** If the change in the COBOL source is a copy member, you must compile all of the COBOL programs using CBLBLD.BAT. You know it is a copy member when the third letter in the file name is a C, as in PTCSQLRT.CBL.

---

The following table describes the various options for CBLMAKE.BAT.

| Option                    | Purpose                                                     |
|---------------------------|-------------------------------------------------------------|
| Cblmake                   | Compiles all source                                         |
| Cblmake all               | Compiles all source                                         |
| Cblmake EBCDIC            | Compiles all source files for DB2 UDB for z/OS              |
| Cblmake PT*               | Compiles all source files that start with PT                |
| Cblmake PT* ALL           | Compiles all source files that start with PT                |
| Cblmake PT* INT           | Generates INT files for all source files that start with PT |
| Cblmake PT* GNT           | Generates GNT files for all source files that start with PT |
| Cblmake PT* EXE           | Generates EXE files for all source files that start with PT |
| Cblmake PTPDBTST INT      | Generates PTPDBTST.INT file                                 |
| Cblmake PTPDBTST INT LIST | Generates PTPDBTST.INT and source listing file              |
| Cblmake PTPDBTST GNT      | Generates PTPDBTST.GNT file                                 |
| Cblmake PTPDBTST EXE      | Generates PTPDBTST.EXE file                                 |

The LIST option creates a source listing file under <compile directory>\<filename>.lis. The LIST option is useful when the compile fails during the debugging phase. The source listing files show exactly where an error occurred. This option is not recommended when the program compiles successfully because the .LIS files can grow to be quite large.

---

**Note.** By default, when the program fails to compile, the system will generate a .LIS file.

---

To compile with CBLMAKE.BAT:

1. Verify that the PS\_HOME and COBROOT environment variables are set up correctly.
2. Open a DOS command prompt window.
3. Make sure the compile directory exists; it may already if you've run CBLBLD.BAT. If it does exist, remove any files residing there—just as a safeguard. If it does not exist, you need to create it.

---

**Note.** Make sure you have write permission to <compile directory> as the compile process will take place there.

---

4. Change to the <PS\_HOME>\setup directory.
5. If the installation is Unicode, run CBL2UNI (with no parameters).
6. Execute the following command to copy all the COBOL source files from the <PS\_HOME> directory to the compile directory:

```
cblsrc <source directory> <compile directory>
```

where <source directory> is the drive and directory where the source resides (it should be the same as <PS\_HOME>), and <compile directory> is the drive and directory to which the source files will be copied.

For example, the following command will take the COBOL source from <PS\_HOME> and copy all the necessary files to the location where the compile process will take place.

```
cblsrc <PS_HOME> c:\temp\compile
```

If the COBOL source that will be compiled is different from the one under <PS\_HOME>, copy that COBOL source to <compile directory>.

---

**Note.** The compile in the next step will generate a GNT file unless the exception file, CBLINT.XX already exists (the XX represents the Product ID). CBLINT.XX contains the list of files that need to be compiled to the INT file. Make sure the intended CBLINT.XX is located under <compile directory> before executing CBLMAKE.

---

7. After CBLSRC completes, change directories to the compile directory, and run CBLMAKE.BAT, using the basic syntax as well as the CBLMAKE table shown earlier as your guide.
8. After CBLMAKE.BAT completes, copy the EXE, GNT, or INT files to the appropriate <PS\_HOME>\CBLBINX directory (CBLBINA, CBLBINU, or CBLBINE).

```
copy *.exe <PS_HOME>\cblbina
copy *.gnt <PS_HOME>\cblbina
copy *.int <PS_HOME>\cblbina
```

---

**Note.** You have to copy these files to the appropriate cblbin directory manually when you use CBLMAKE; they are not copied automatically, as when you use CBLBLD.

---

## Task 12-1-3: Defining the GNT and INT Files

By default, the compile generates a GNT file unless the exception file, CBLINT.XX already exists. CBLINT.XX contains the list of files that need to be compiled to the INT file.

---

**Note.** The INT exception file is sometimes needed to overcome MicroFocus execution error with GNT files.

---

For example, the exception file, CBLINT.PT, where *PT* represents PeopleTools, would contain the following information:

```
Call cblcrnt <file name without file extension>
```

or:

```
Call cblcprint PTPDBTST
```

---

## Task 12-2: Distributing COBOL Binaries

Once you've compiled your COBOL, you must transfer it to the needed locations. Copy the contents of <PS\_HOME>\CBLBINX (CBLBINA, CBLBINU, or CBLBINE) directory into <PS\_HOME>\CBLBINX (CBLBINA, CBLBINU, or CBLBINE) on your batch and application server machines.





## CHAPTER 13

# Installing PeopleSoft Change Assistant

This chapter discusses:

- Understanding PeopleSoft Change Assistant
- Installing and Configuring PeopleSoft Change Assistant
- Specifying Options
- Exporting Jobs to XML, HTML, or Microsoft Excel Format
- Validating Change Assistant Settings

---

## Understanding PeopleSoft Change Assistant

Oracle's PeopleSoft Change Assistant is a standalone application that enables you to assemble and organize the steps necessary to apply patches and fixes for maintenance updates. You also use PeopleSoft Change Assistant for software upgrades, that is, the process of moving from one PeopleTools release to another PeopleTools release.

In order to perform reliable and accurate updates, PeopleSoft Change Assistant gathers all the necessary information including the change log from the Environment Management hub and uploads it to PeopleSoft Customer Connection. With the environment data available, PeopleSoft Customer Connection can determine what updates apply to your environment.

When you access PeopleSoft Customer Connection, you can obtain a list of all unapplied updates for a given application environment including all prerequisites. You can then download a set of change packages associated with the update IDs and install the patches and fixes with minimal effort.

---

## Task 13-1: Installing and Configuring PeopleSoft Change Assistant

This section discusses:

- Installing PeopleSoft Change Assistant
- Setting Up Security for Change Assistant
- Scanning the Workstation

## Task 13-1-1: Installing PeopleSoft Change Assistant

At the end of the installation, you have the option of installing PeopleSoft Change Impact Analyzer. For more information on that installation, see the following chapter.

See “Installing PeopleSoft Change Impact Analyzer.”

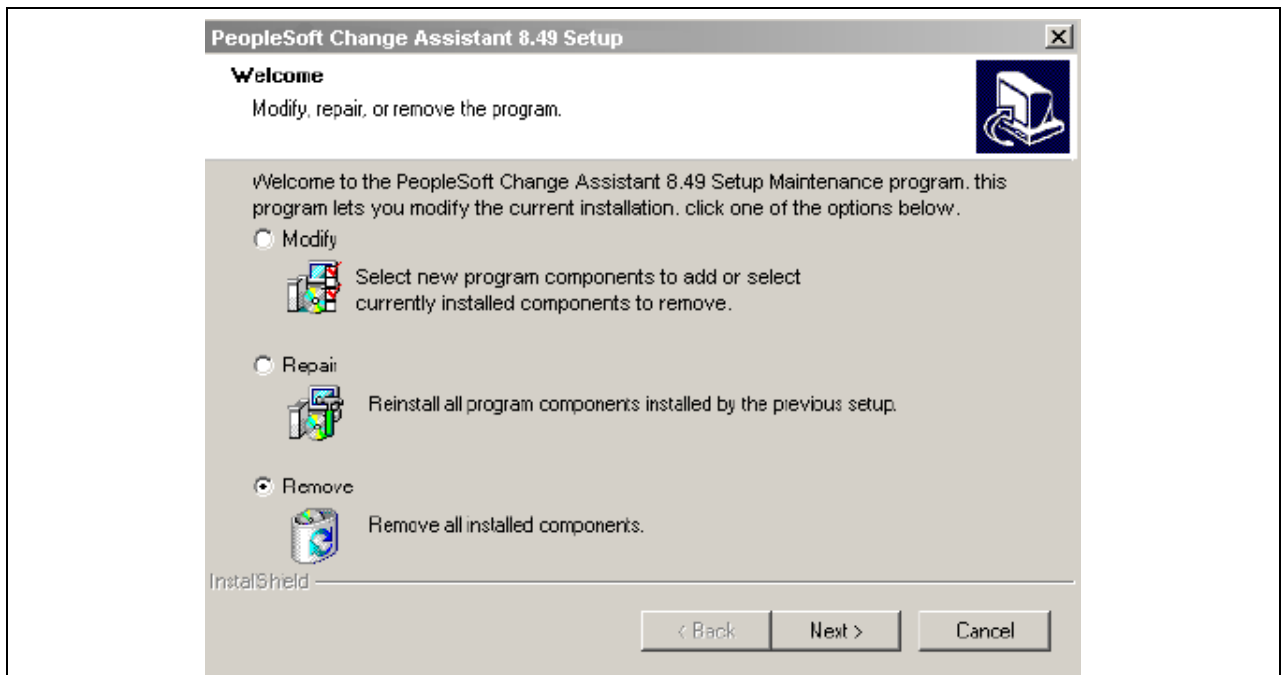
To install PeopleSoft Change Assistant:

---

**Note.** A Windows-based operating system is required to use Change Assistant.

---

1. From the <PS\_HOME>/setup/PsCA directory, run `Setup.exe`.
2. If there is an existing installation of PeopleSoft Change Assistant the following screen appears:

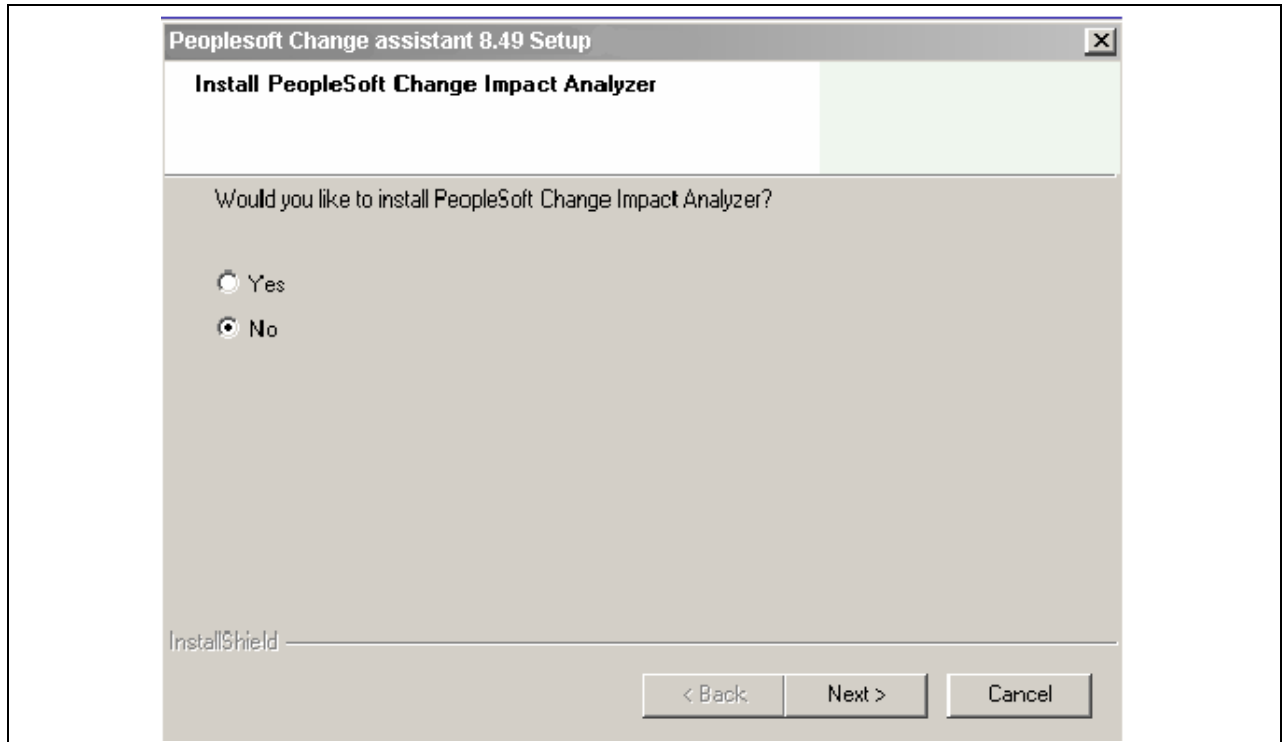


Change Assistant Setup Maintenance

Select the Remove radio button, then click Next to remove the previous installation and close the screen. Run <PS\_HOME>/setup/PsCA/setup.exe again.

3. On the Welcome screen, select Next.  
The Change Assistant screen appears.
4. Accept the default Destination Folder or specify another Destination Folder.
5. Select Next.  
The Start Copying Files screen appears.
6. Click Back to review or change any settings.  
If you are satisfied with your settings, click Next to begin copying files. Change Assistant copies files to the designated directory.
7. On the screen asking whether you want to install Change Impact Analyzer, select No, and click Next.

If you select Yes, the PeopleSoft Change Impact Analyzer installation begins. You will do this installation in the next chapter. Instead, continue with the tasks in this chapter to finish setting up PeopleSoft Change Assistant.



Choosing not to install Change Impact Analyzer

8. Click Finish to complete the installation process.
9. Reboot your machine after the installation process is complete.

## Task 13-1-2: Setting Up Security for Change Assistant

To use PeopleSoft Enterprise Change Assistant, you must configure your firewall settings so that the firewall does not filter PeopleSoft domain and IP names.

---

**Note.** When setting trust rules or bypass rules on your proxy server, or in browser security, it is easier to maintain rules by domain or IP subnet.

---

The following features must be set to allow access for PeopleSoft Enterprise Change Assistant:

- *Domains:* Allow access for the domains `www.peoplesoft.com` and `update.peoplesoft.com`.  
We recommend that you set domain rules to allow access to `*.peoplesoft.com`.
- *IP addresses:* Allow access for the IP addresses `192.206.43.114` and `192.206.43.105`.  
We recommend that you set IP rules at the subnet `192.206.43.0`.
- *FTP sites:* Configure your firewall to allow inbound ftp when the request is not initiated on the same port.  
Software update requests go to PeopleSoft Customer Connection on one port number, and the actual download comes back on a different ftp port number.

Change Assistant uses SSL to connect at all times, but when you log in to PeopleSoft Customer Connection or Update Gateway through a browser only the login page is SSL.

## Task 13-1-3: Scanning the Workstation

The first time you use Change Assistant, it automatically scans your workstation for applications that it will use in order to automate the steps. For example, it automatically finds the SQL Query tool and uses it to run SQL commands or scripts.

If you add a new application or update an existing application, Change Assistant must perform a scan of the system in order to discover the changes. To perform this scan, select Tools, Scan Configuration.

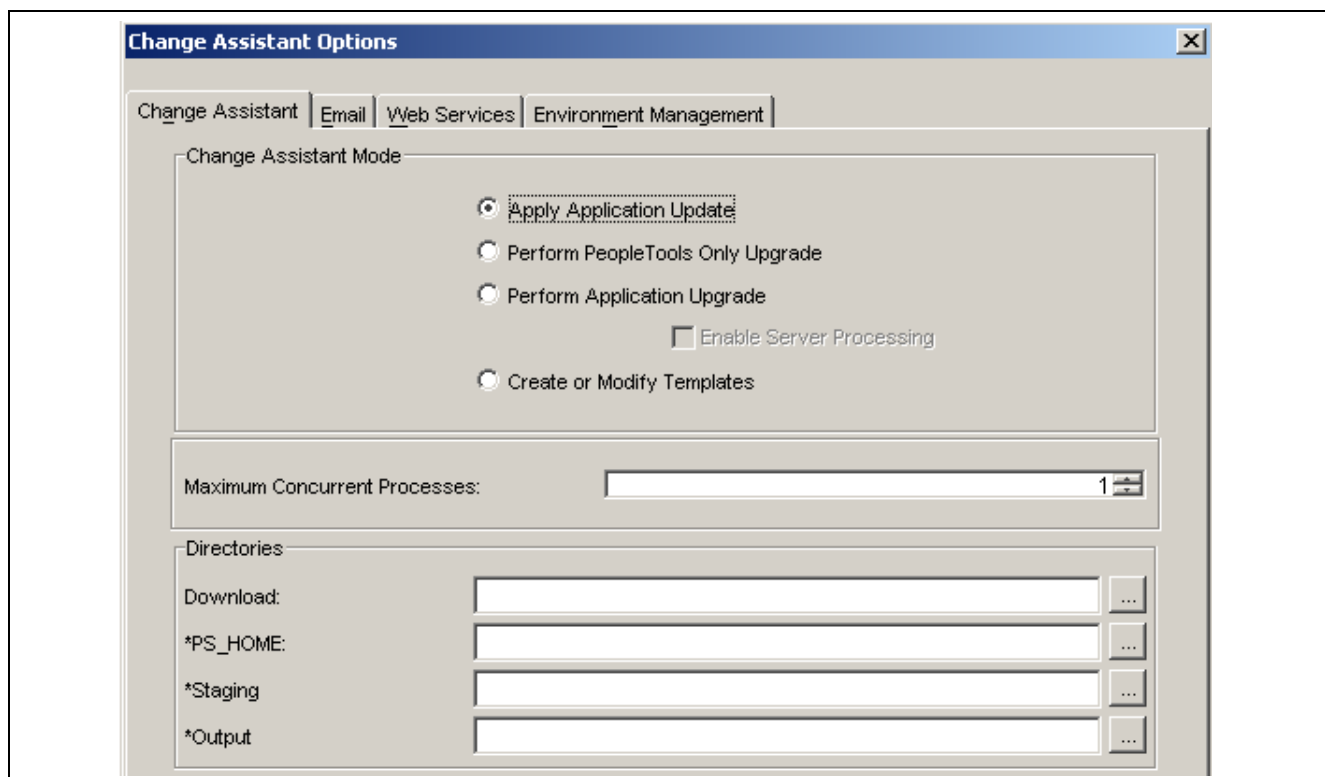
## Task 13-2: Specifying Options

This section discusses:

- Specifying Change Assistant Options
- Setting Email Options
- Setting Up Web Services Options
- Setting Environment Management Options

### Task 13-2-1: Specifying Change Assistant Options

This section describes options to set in Change Assistant. Select Tools, Options, Change Assistant.



Change Assistant Options window

#### Change Assistant Mode

Select one of the following radio buttons; the window changes depending upon the mode you choose:

- Apply Application Update
- Perform PeopleTools Only Upgrade
- Perform Application Upgrade
- Enable Server Processing

Select this check box to enable Change Assistant to run Application Engine, Data Mover User, Data Mover Bootstrap, and SQL Scripts on Remote Agents as configured through Environment Management Framework as part of the Application upgrade.

- Create or Modify Templates

**Maximum Concurrent Processes**

Specify the maximum number of processes that can be executed concurrently on the local machine. The default at installation time is one.

**Download Directory**

Enter the full path of the location to which you want to download your change packages.

**\*PS\_HOME**

Enter the full path of the directory in which you installed PeopleTools.

**\*Staging Directory**

Enter the directory in which you would like to stage all the Change Assistant update files. This is the location that Change Assistant will store files to be used during the apply update process.

**\*Output Directory**

Enter the directory in which you want the log files generated by the update process to reside.

## Task 13-2-2: Setting Email Options

Select Tools, Options, Email.

**Send email notifications**

Select this check box to receive email notifications if there are errors in the update process. Change Assistant also sends you a completion message when it encounters a *Stop* in the update process.

**SMTP Server**

Enter the SMTP mail server from which you receive the error or completion messages.

**Port**

Enter the port from which you want to access the email.

**Send To**

Enter the address to which you want the email sent.

**Return Address**

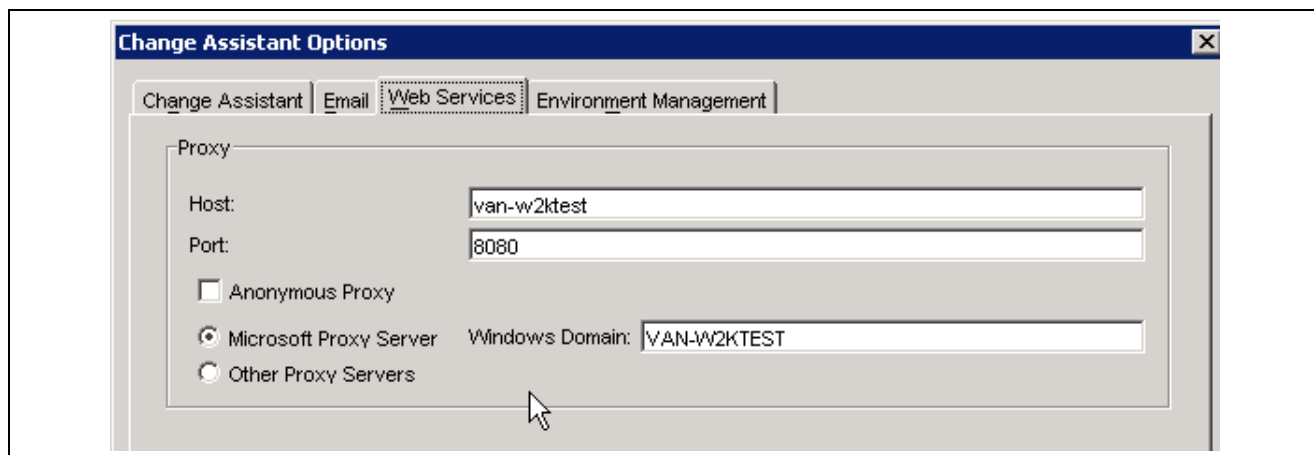
Enter the email address of the sender. Use this to identify who sent the notification.

**Test**

Use to validate that email is sent to the designated recipients and is working correctly

## Task 13-2-3: Setting Up Web Services Options

Select Tools, Options, Web Services.



Change Assistant Options: Web Services tab

|                               |                                                                                                                             |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| <b>Host</b>                   | (Optional) Enter the name of the proxy server if you want to run Change Assistant behind the firewall using a proxy server. |
| <b>Port</b>                   | (Optional) Enter the port number for the proxy server.                                                                      |
| <b>Anonymous Proxy</b>        | Indicates that you are using a proxy server that does not require authenticated connections.                                |
| <b>Microsoft Proxy Server</b> | Indicates that you are using a proxy server with Windows NT authentication.                                                 |
| <b>Windows Domain</b>         | The domain to which you belong.                                                                                             |
| <b>Other Proxy Servers</b>    | Indicates you are using non-Microsoft proxy servers.                                                                        |

## Task 13-2-4: Setting Environment Management Options

Select Tools, Options, Environment Management.

|                        |                                                                                                                                                                                                                                                                                                                                    |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Server Hostname</b> | The hostname of the server in which the Environment Management components reside.                                                                                                                                                                                                                                                  |
| <b>Server Port</b>     | Indicates the port in which to connect to the Environment Management hub.                                                                                                                                                                                                                                                          |
| <b>Ping (button)</b>   | Click to verify a valid server URL. If you see "Service is off" to the right of this button, then you must correct the server URL and ping again until you see "Service is on."                                                                                                                                                    |
| <b>Chunk Size</b>      | Used for deploying files during a software update. Default is 1024 * 1024 bytes. Typically this does not need to be changed unless there are a significant number of files greater than 1024 KB in a software update.                                                                                                              |
| <b>Ping Interval</b>   | Ping interval is in milliseconds for Change Assistant to contact the hub for new messages.                                                                                                                                                                                                                                         |
| <b>Drives to Crawl</b> | Setting of drives to crawl to identify the configuration of the Change Assistant machine. Windows directories need to use the forward slash (/) character. Include your local drive in this setting so that Change Assistant can locate the SQL Query tool used for automating steps. Also include the path of the SQL Query tool. |

---

## Task 13-3: Exporting Jobs to XML, HTML, or Microsoft Excel Format

Change Assistant allows users to export jobs to XML, HTML, or Microsoft Excel file formats. Do this by selecting File, Export Job in Change Assistant. Then, enter the desired exported filename and select the desired file type format.

---

## Task 13-4: Validating Change Assistant Settings

After you have set up and configured Change Assistant and the Environment Management components, you should validate your Change Assistant and environment settings.

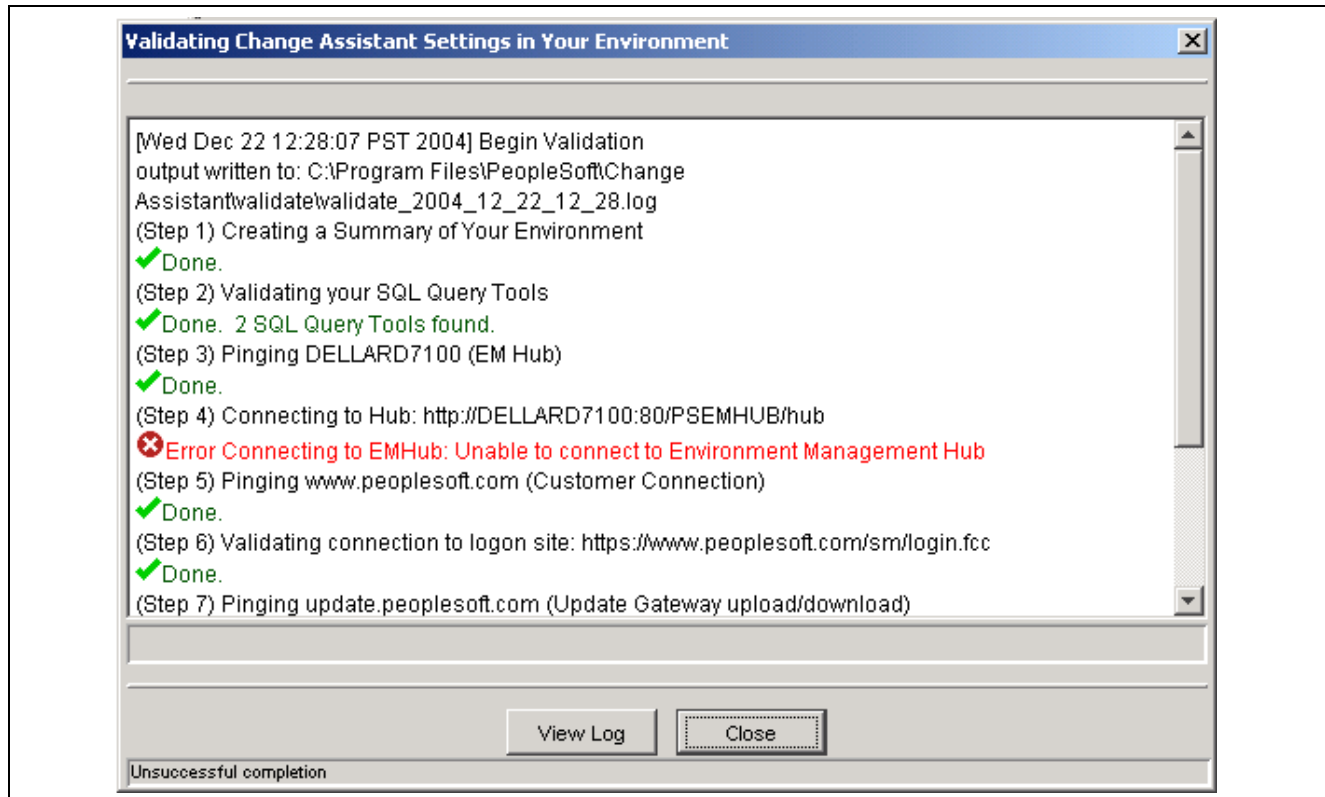
Change Assistant validates settings by:

- Locating valid SQL query tools required to run SQL scripts.
- Testing the Environment Management hub and ensuring that Change Assistant can communicate with it.
- Testing Customer Connection and ensuring that Change Assistant can communicate with it.

You can also print a summary of your environment, which can facilitate the diagnosis of problems by PeopleSoft Global Support.

To validate your environment, select Tools, Options, Validate. Click Start Validation.

If any of the steps were unable to complete successfully, open the log file to determine the cause.

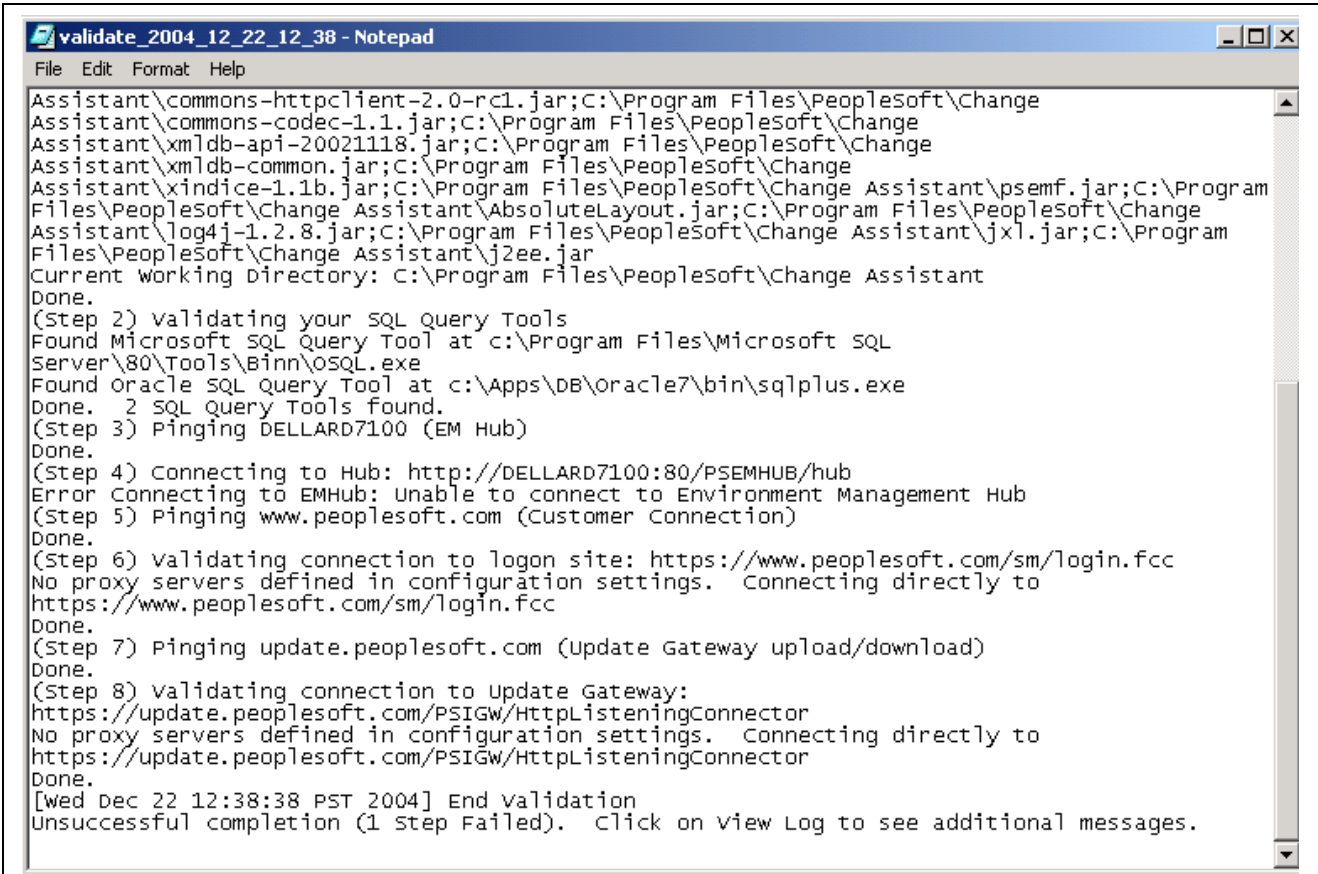


Validating Change Assistant Settings in Your Environment

**Note.** If you use proxy servers, the system will ping those and prompt for proxy server user ID and password. In this case, the validation step numbers would be different from the example.

To review the log file, click the View Log button at the bottom of the screen:





```

validate_2004_12_22_12_38 - Notepad
File Edit Format Help
Assistant\commons-httpclient-2.0-rc1.jar;C:\Program Files\PeopleSoft\Change
Assistant\commons-codec-1.1.jar;C:\Program Files\PeopleSoft\Change
Assistant\xml-db-api-20021118.jar;C:\Program Files\PeopleSoft\Change
Assistant\xml-db-common.jar;C:\Program Files\PeopleSoft\Change
Assistant\xindice-1.1b.jar;C:\Program Files\PeopleSoft\Change Assistant\psemf.jar;C:\Program
Files\PeopleSoft\Change Assistant\AbsoluteLayout.jar;C:\Program Files\PeopleSoft\Change
Assistant\log4j-1.2.8.jar;C:\Program Files\PeopleSoft\Change Assistant\jxl.jar;C:\Program
Files\PeopleSoft\Change Assistant\j2ee.jar
Current working Directory: C:\Program Files\PeopleSoft\Change Assistant
Done.
(Step 2) Validating your SQL Query Tools
Found Microsoft SQL Query Tool at c:\Program Files\Microsoft SQL
Server\80\Tools\Binn\OSQL.exe
Found Oracle SQL Query Tool at c:\Apps\DB\Oracle7\bin\sqlplus.exe
Done. 2 SQL Query Tools found.
(Step 3) Pinging DELLARD7100 (EM Hub)
Done.
(Step 4) Connecting to Hub: http://DELLARD7100:80/PSEMHUB/hub
Error Connecting to EMHub: Unable to connect to Environment Management Hub
(Step 5) Pinging www.peoplesoft.com (Customer Connection)
Done.
(Step 6) Validating connection to logon site: https://www.peoplesoft.com/sm/login.fcc
No proxy servers defined in configuration settings. Connecting directly to
https://www.peoplesoft.com/sm/login.fcc
Done.
(Step 7) Pinging update.peoplesoft.com (Update Gateway upload/download)
Done.
(Step 8) Validating connection to update Gateway:
https://update.peoplesoft.com/PSIGW/HttpListeningConnector
No proxy servers defined in configuration settings. Connecting directly to
https://update.peoplesoft.com/PSIGW/HttpListeningConnector
Done.
[Wed Dec 22 12:38:38 PST 2004] End Validation
Unsuccessful completion (1 Step Failed). Click on view Log to see additional messages.

```

Validation log



## CHAPTER 14

# Installing PeopleSoft Change Impact Analyzer

This chapter discusses:

- Prerequisites
- Installing Change Impact Analyzer

---

## Prerequisites

Oracle's PeopleSoft Change Impact Analyzer (PsCIA) is a tool you can use to evaluate the effect of changes you make on your installation. CIA can help you monitor the impact a Change Package has on your system, as well as monitor the impact from other changes such as customizations.

Ensure that your system meets the following requirements before you begin this installation:

- The PsCIA runs on Windows. For database platforms that do not run on Windows, install PsCIA on the Windows client.
- You can install PsCIA from downloaded files as a standalone application, or as a part of your PeopleTools installation. You can also install PsCIA as a part of the PeopleSoft Change Assistant installation, as mentioned in the previous chapter. These instructions assume you have installed PeopleTools on the machine on which you want to run PsCIA, and have completed the PeopleSoft Change Assistant installation.
- You must install JDBC drivers for connectivity to your database platform. PsCIA uses Type 4 JDBC drivers by default.

You can normally obtain JDBC drivers from your RDBMS vendor. Search the vendor's web site or contact the vendor for information.

### See Also

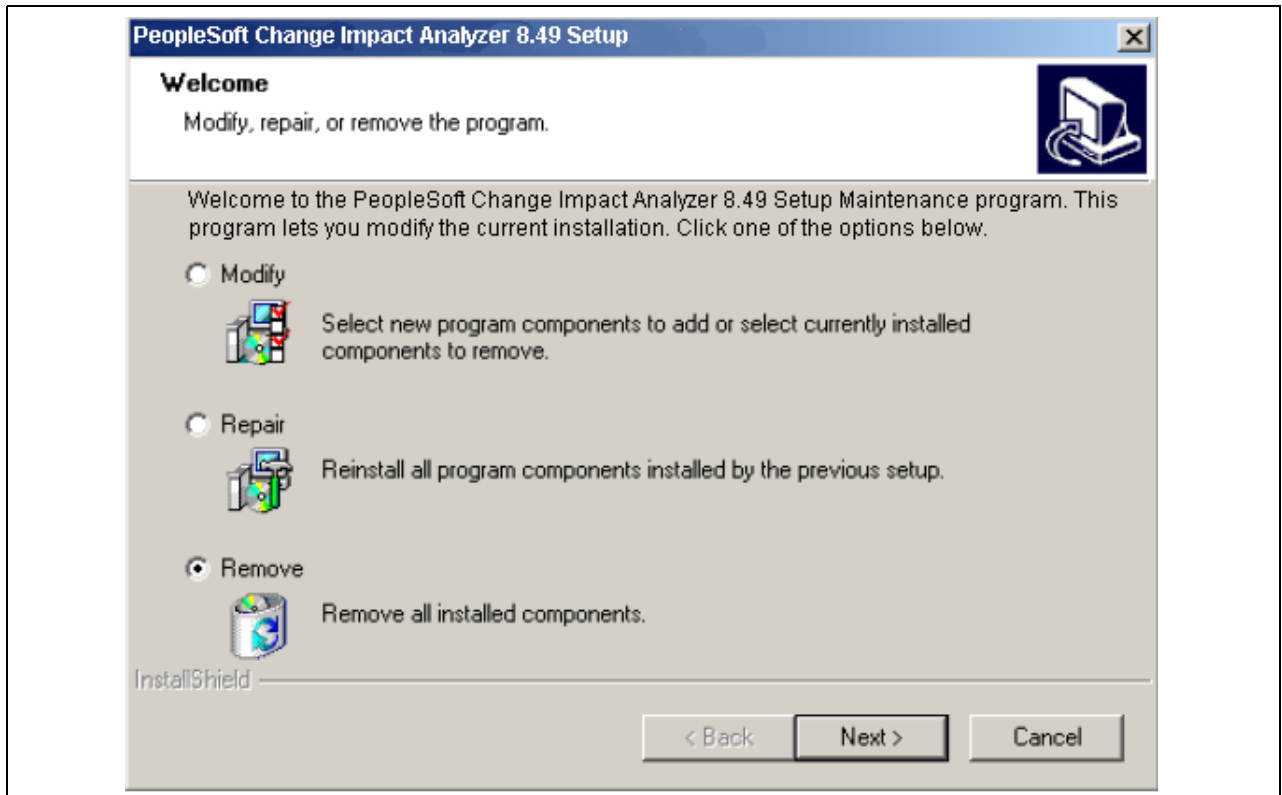
*Enterprise PeopleTools 8.49 PeopleBook: Software Updates*

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## Task 14-1: Installing Change Impact Analyzer

To install Change Impact Analyzer and Rules Editor:

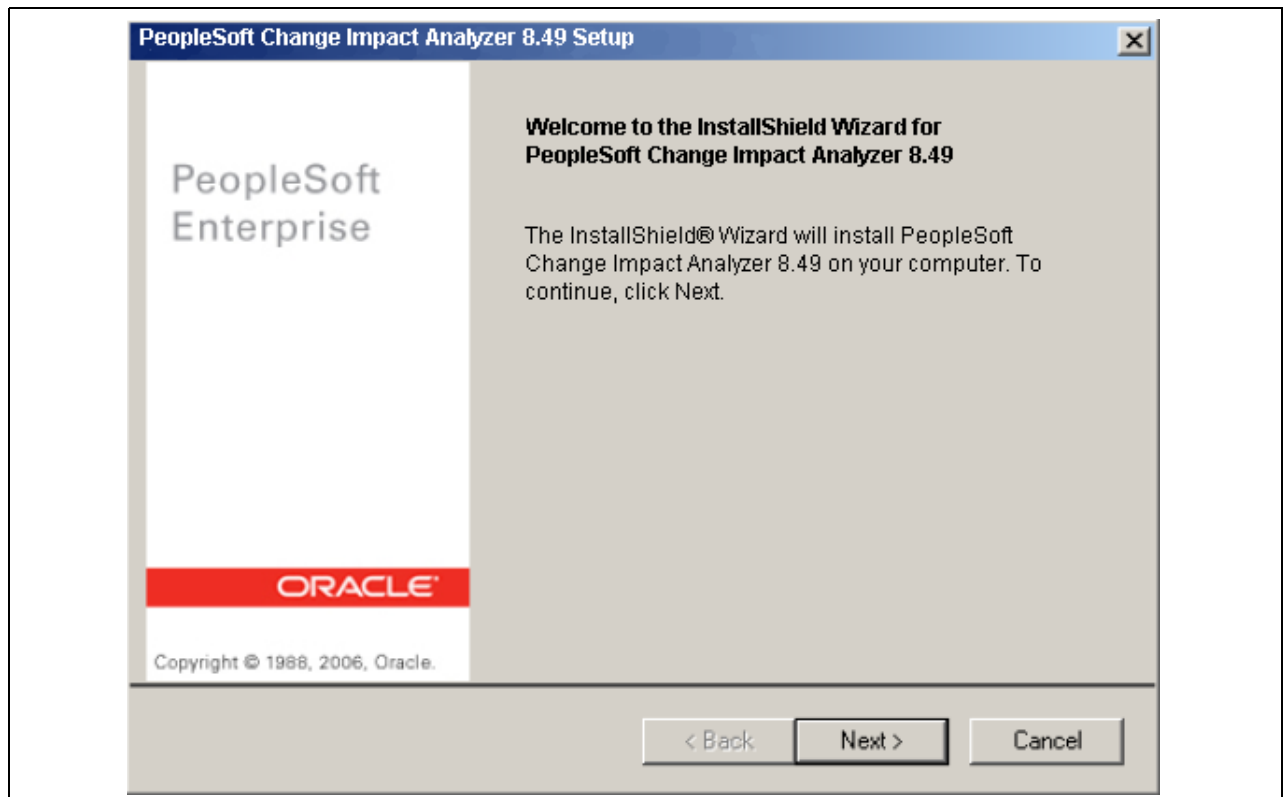
1. From the <PS\_HOME>\setup\PsCIA directory, run `setup.exe`.  
A Welcome screen appears.
2. If there is an existing installation of PsCIA on your machine, a screen appears asking whether you want to Modify, Update, or Remove the existing installation.



PeopleSoft Change Impact Analyzer Setup Maintenance window

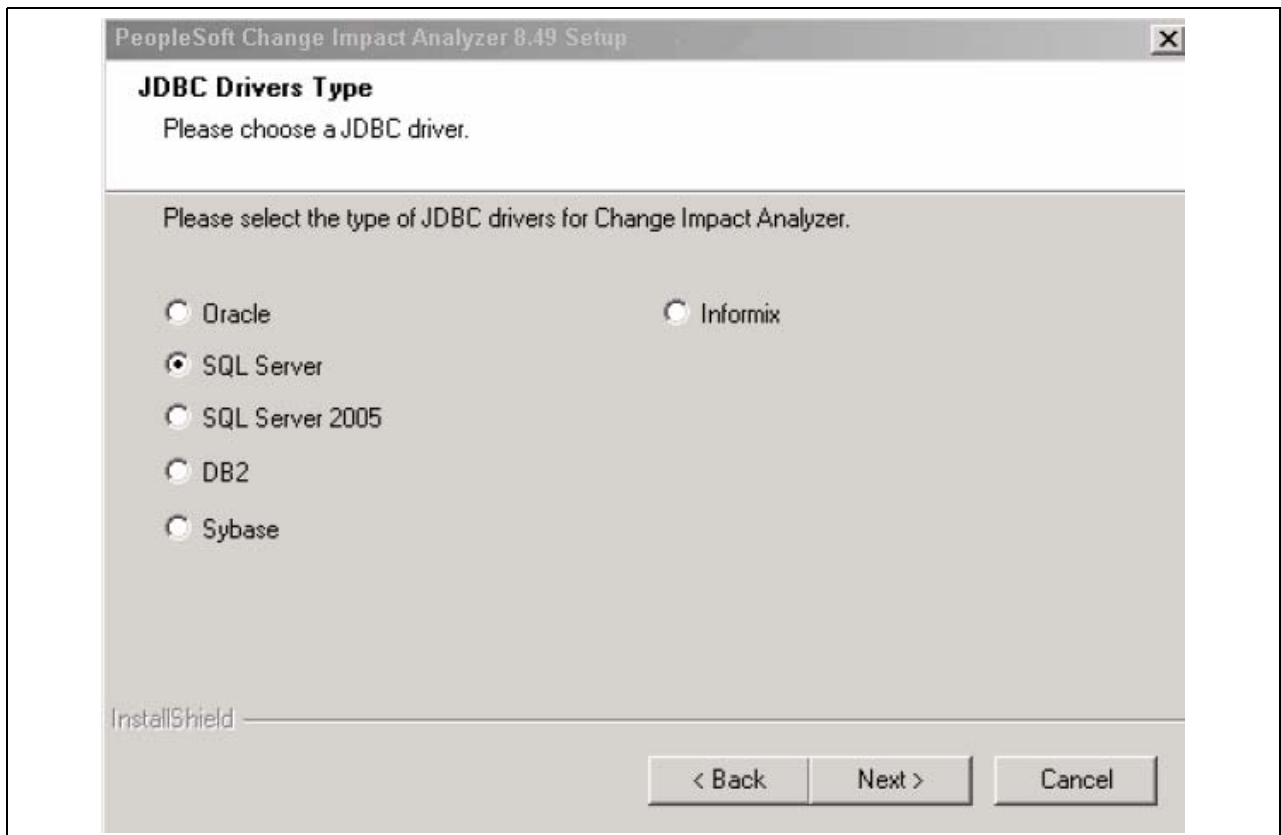
Select the Remove radio button, then click Next to remove the previous installation and close the screen. Run `<PS_HOME>/setup/PsCIA/setup.exe` again.

3. Click Next.

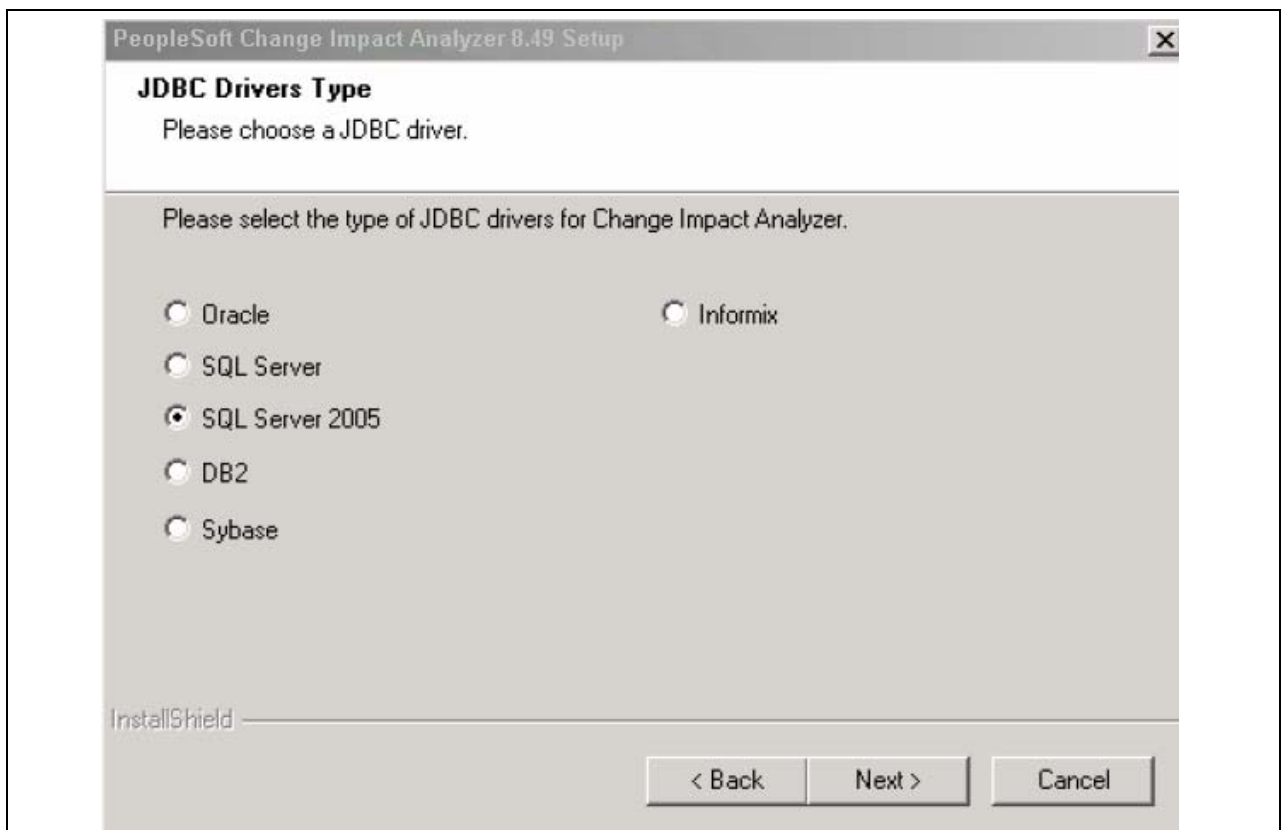


PeopleSoft Change Impact Analyzer welcome window

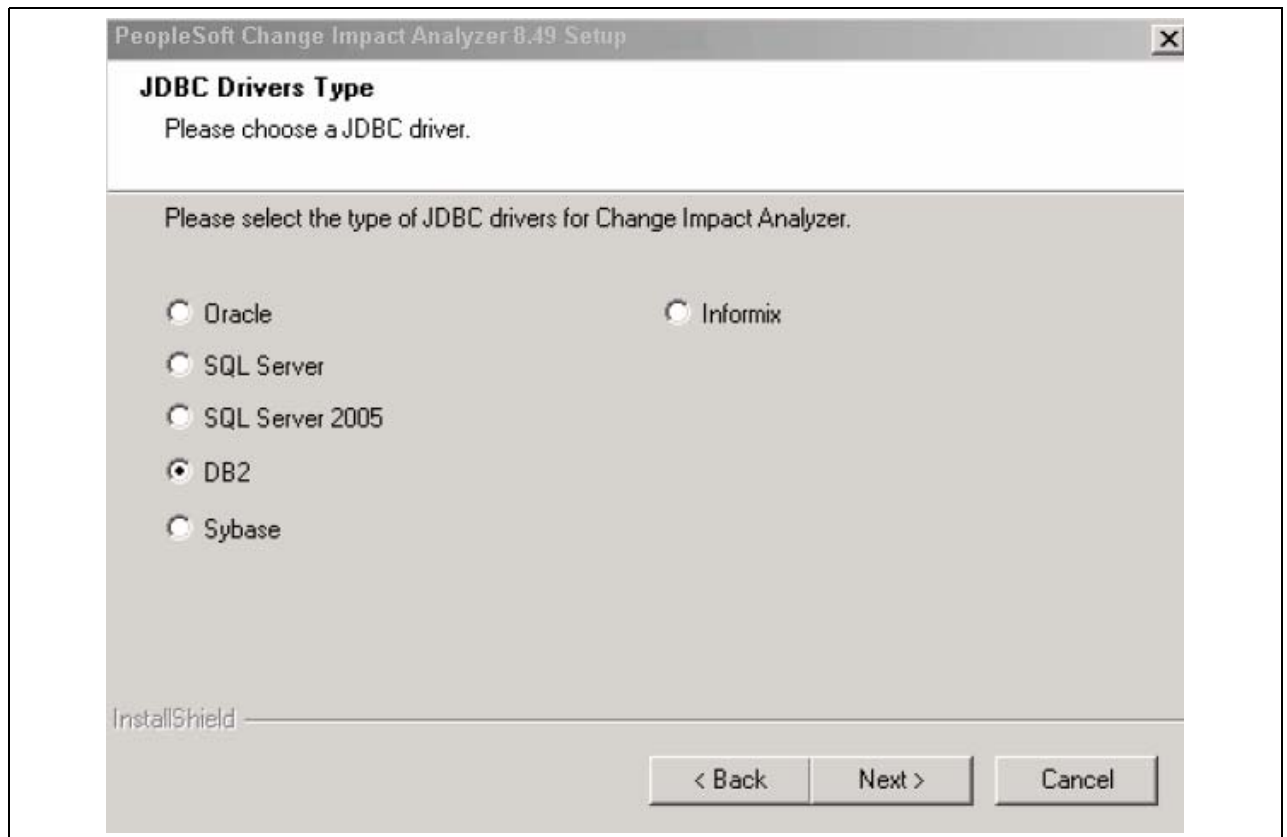
4. Select the JDBC drivers for your database platform.



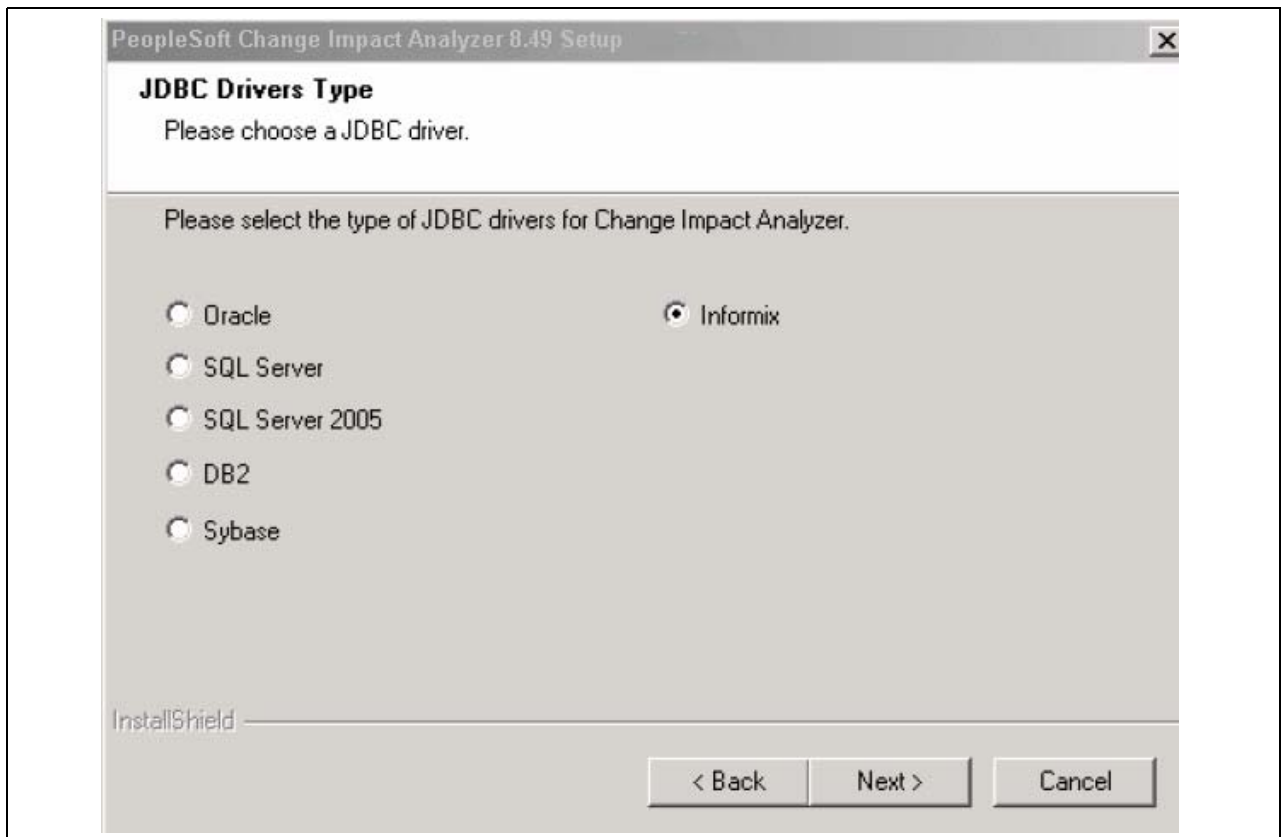
Selecting JDBC drivers type



Selecting JDBC drivers type

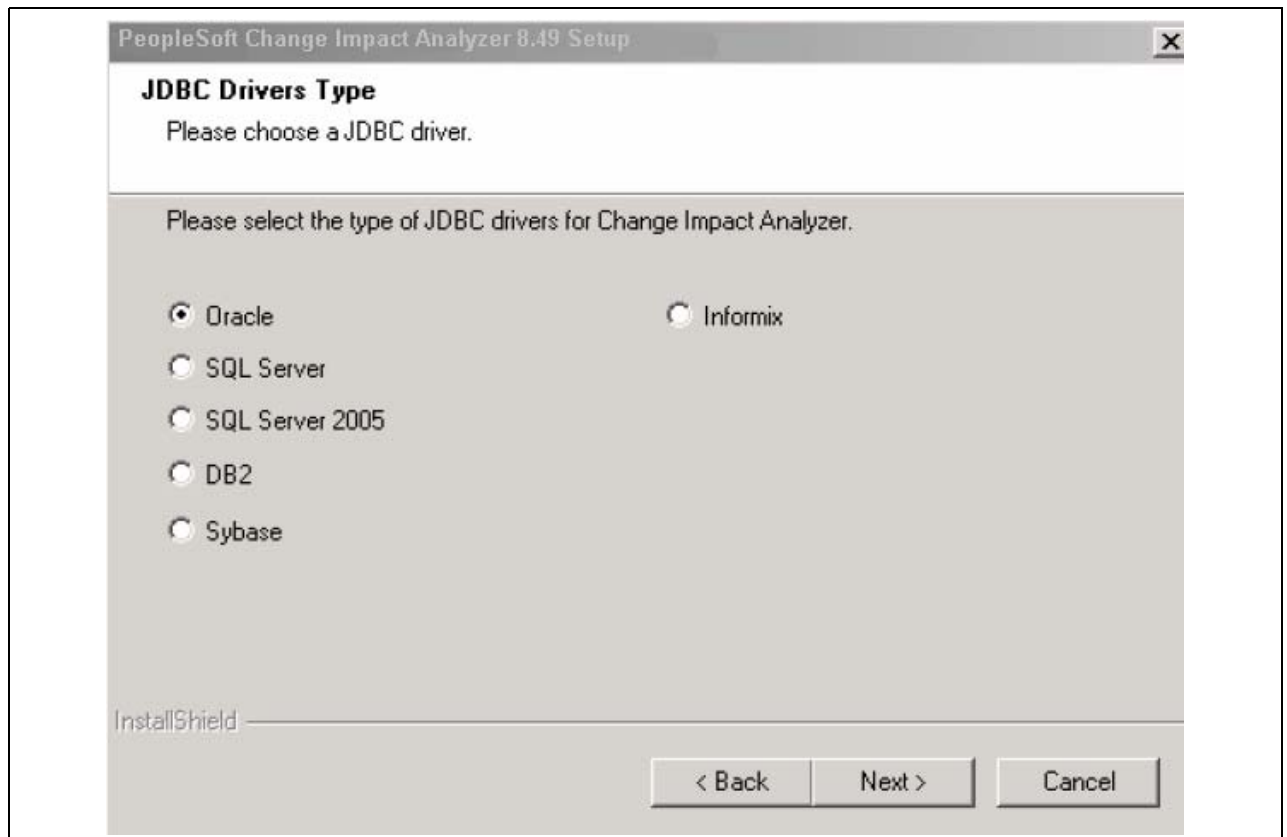


Selecting JDBC drivers type

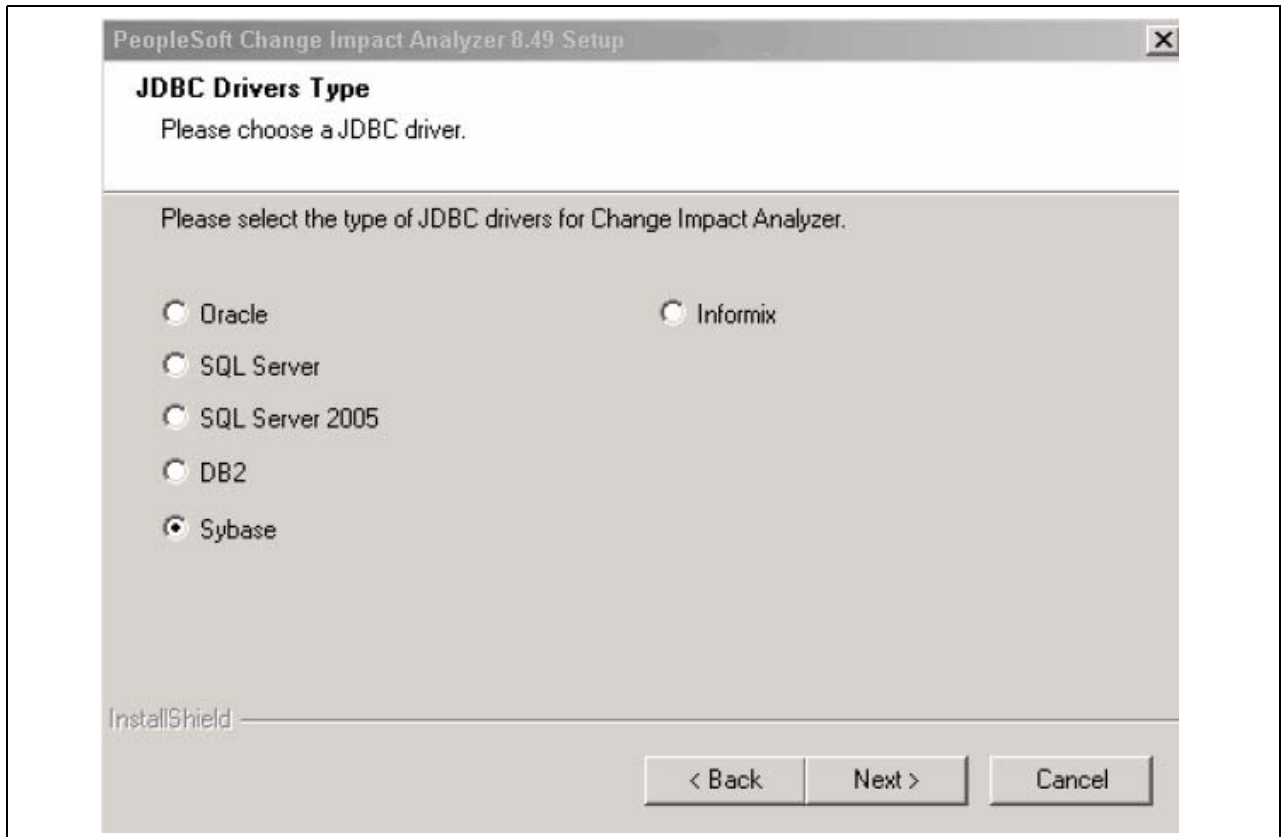


Selecting JDBC drivers type



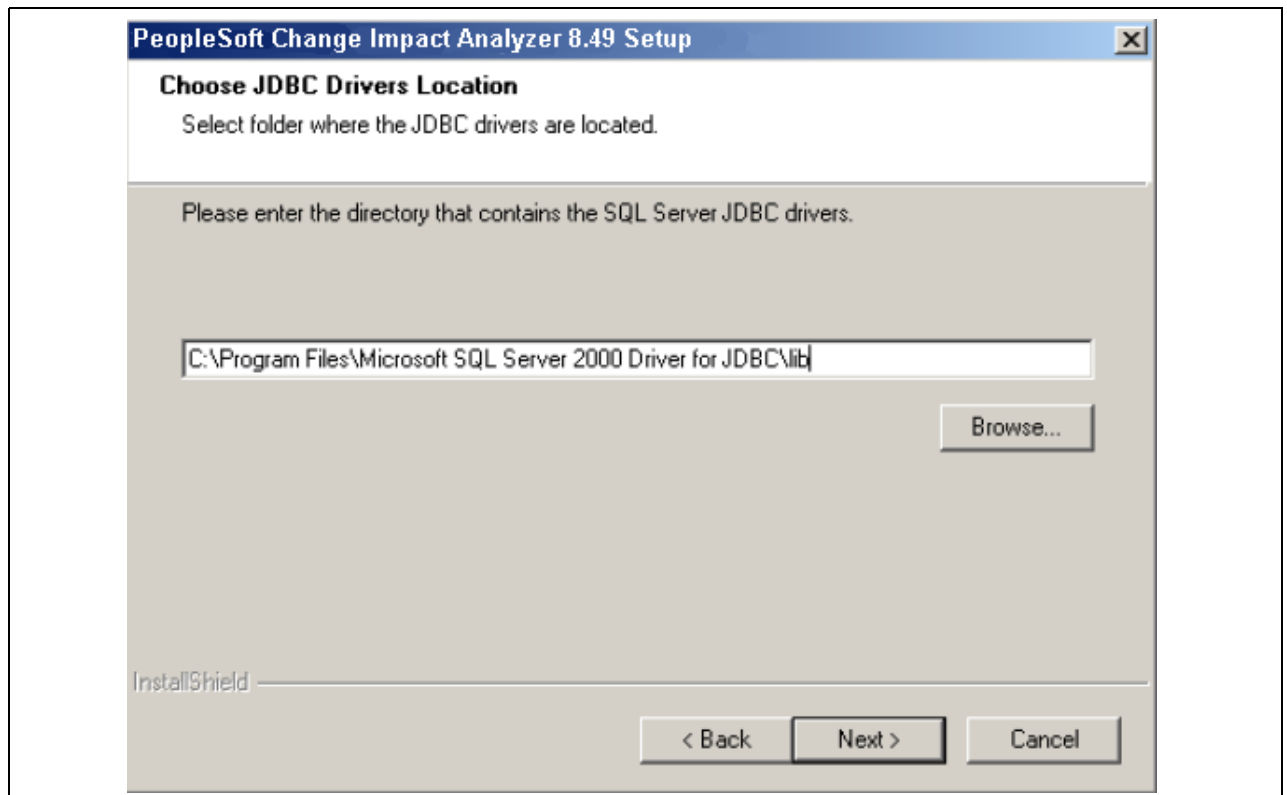


Selecting JDBC drivers type



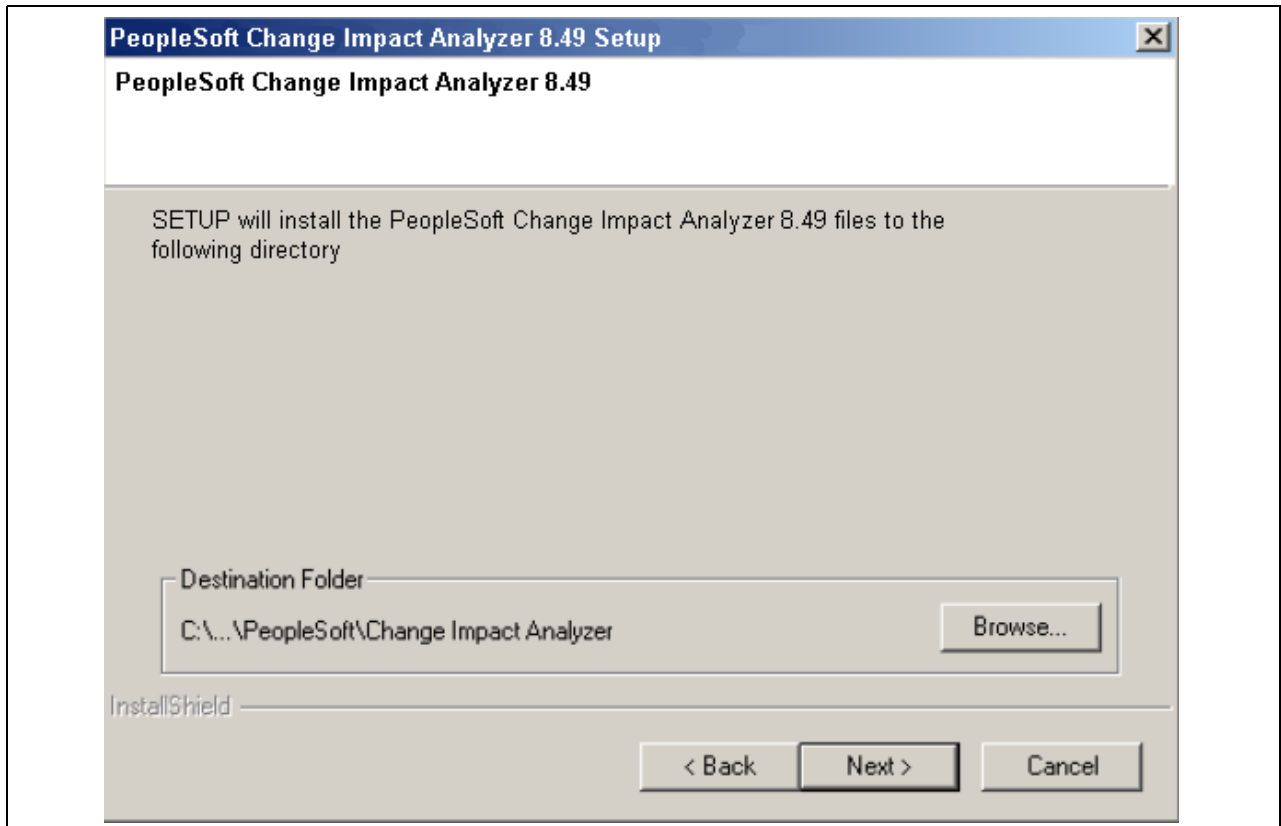
Selecting JDBC drivers type

5. Browse to select the directory where the JDBC drivers are installed, or accept the default location.



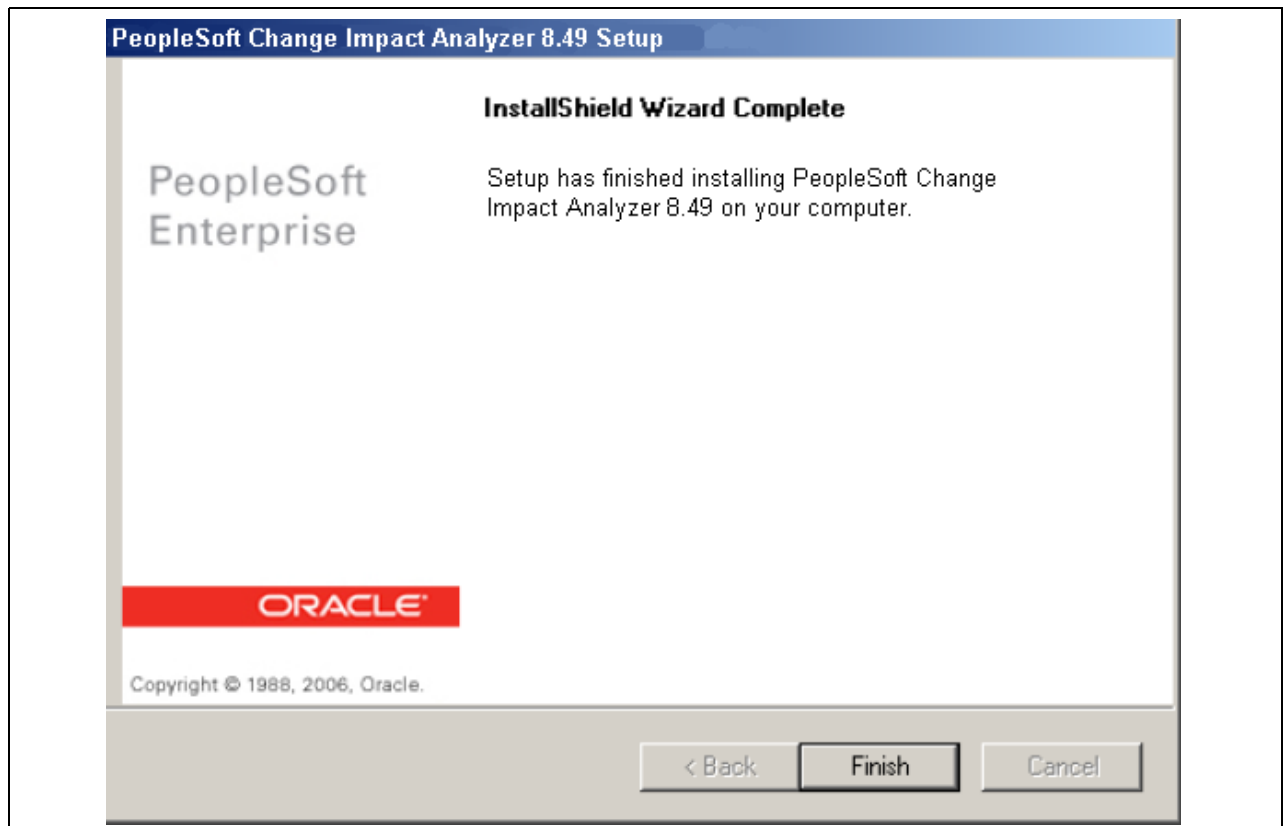
Choosing JDBC drivers location

6. Browse to select the directory where PsCIA will be installed, or accept the default directory.



Selecting the destination folder

7. Click Back to review or change any settings.  
If you are satisfied with your settings, click Next to begin copying files to the designated directory.
8. Click Finish to exit when the installation is complete:



Installation complete

9. To start PsCIA, select Start, Programs, PeopleTools 8, Change Impact Analyzer.



## APPENDIX A

# Adding New Product Modules

This appendix discusses:

- Adding New Module(s) to PeopleSoft 8.4 Installations

---

### Task A-1: Adding New Module(s) to PeopleSoft 8.4 Installations

This task explains how to add new application modules to an existing PeopleSoft installation. Follow this procedure if, for example, you already installed HRMS and now you need to install Time and Labor.

When you add new application modules to an existing installation, you may overwrite files that were included as part of a patch or fixes, or customizations that you applied. For example, suppose you customize a report that PeopleSoft then redelivers. If you install the update into your current working directory, your customized report will be overwritten with the newly installed, updated report.

PeopleSoft does not currently provide an automated way to notify you before overwriting customized modules or patch files. You can make preparations to protect important files from being overwritten. For your customized modules, you need to maintain a backup of any customizations. It is also a good idea to make a copy of your <PS\_HOME> directory before beginning this process, so that you can find and restore necessary patch files. Check PeopleSoft Customer Connection to identify any patches or fixes required for your installation.

See PeopleSoft Customer Connection, Updates and Fixes.

To add new module(s) to PeopleSoft 8.4 installations:

1. Back up the database, file server, application server, Process Scheduler Server, and web server components of your current system.
2. Make sure you have the new license code that includes the new module(s). The new license code allows you to load the batch components for the new module(s).
3. Install the Application CD on the file server.
4. When prompted, enter the new license code for your applications.

Initially, all installation options will be selected. You must deselect those programs you do not wish to install.

5. Launch Data Mover in bootstrap mode (sign in as the accessid and password).

Data Mover is located in <PS\_HOME>\bin\client\winx86\psdmt.exe.

6. Select File, Database Setup and choose your database type in the resulting dialog.
7. Select Next and select add new product.
8. Select Finish and a Data Mover script that updates the license code will be generated in Data Mover.

9. Select File, Run script and your database updates are complete.
10. Install software to your batch server.

See “Setting Up Process Scheduler.”

11. Reapply all code customizations if needed.

---

**Note.** Remember to maintain back-up copies of your customizations.

---

12. Compile and link COBOL.

See Compiling COBOL.

13. Verify that the appropriate Installation Records are selected.

If they are not checked, check them and save the page. To open the page, select Setup <apptype>, Install, Installation Options, where <apptype> is HRMS, CRM, Financials/Supply, and so on. (For HRMS the navigation is Setup <apptype>, Install, Installation Table.)

14. Run the DDDAUDIT and SYSAUDIT SQRs.

See “Creating a Database.”

15. Shut down all application servers.

16. Install software to your application server.

See “Configuring the Application Server.”

17. Restart all required application servers.

18. Shut down all web servers.

19. Install software to your web server.

See “Setting Up the PeopleSoft Pure Internet Architecture.”



## APPENDIX B

# Creating a Database Manually

This appendix discusses:

- Understanding Database Creation
- Running Server Configuration Scripts
- Creating a Database
- Configuring ODBC Data Source
- Running ADDOBJ.SQL
- Setting Up Connect ID
- Creating Data Mover Import Scripts
- Running Data Mover Import Scripts
- Updating Database to Latest PeopleTools Release
- Running Additional Data Mover Scripts
- Installing a Multilingual PeopleTools System Database
- Running VERSION Application Engine Program
- Changing the Base Language
- Running SQR Reports
- Checking the Database
- Cleaning and Backing Up the Database

---

## Understanding Database Creation

This section describes the tasks required to create a PeopleSoft product database. During a standard PeopleSoft installation you will execute these tasks to create two distinct types of databases.

- *System*: The System database has no company specific data, and can be used to load your data and begin development of your production database.
- *Demo*: The Demo database contains data for a sample company, and can be used immediately for demonstration, for testing, and as a development reference.

The requirements for these databases vary, so not all of this section's tasks apply to each database. The instructions will note any distinctions between creating a Demo and a System database.

Remember, you need to have the PeopleTools Development Environment set up to create your database.

---

**Important!** Do not forget that application-specific installation steps are provided in a separate document specific to the application. For instance, if you are performing PeopleSoft CRM installation, you need both this PeopleTools installation guide and any additional instructions provided by CRM. To find the installation documentation specific to your application, go to PeopleSoft Customer Connection. Under the Site Index, find the category “Installation Guides and Notes,” and then look under the subcategory for your particular application.

---

---

**Important!** Starting with PeopleTools 8.48 an additional set of installation scripts were delivered to support SQL Server 2005 installations. These scripts should only be used when installing with SQL Server 2005. The naming convention for these scripts is as follows: <script name>\_2005.sql where <script\_name> is the name of the script used for SQL Server 2000. Use these scripts when installing with SQL Server 2005. For example in this guide, we refer to the script createdb.sql to create a database. The counterpart of the script createdb.sql for SQL Server 2005 is createdb\_2005.sql

---

---

## Task B-1: Running Server Configuration Scripts

---

**Note.** The spconfig12.50.sql script should be run for both Sybase 12.5 and 15.0 servers.

---

As a part of the installation files, PeopleSoft previously provided a generic SQL script (spconfig.sql) to serve as a guideline for database server configuration parameters. For PeopleTools 8.46 and above we have modified the configuration file and reset all the parameters to default. We still deliver the file, and it can be used by the database administrator to keep the server configuration. The script will also be used by the database configuration wizard, so it is important to make sure it has the correct parameters for your database server. Feel free to modify accordingly.

To run the server configuration scripts:

1. Start Query Analyzer (or another Microsoft SQL Server query tool).
2. Connect to your Microsoft SQL Server, and select the Master database.
3. Open the SPCONFIG.SQL script, which is located on the file server in <PS\_HOME>\scripts\  
Be sure to read any comments in the script.
4. Run the script.

---

**Note.** The script will shut down the database server; you need to restart the server for the next task.

---

---

## Task B-2: Creating a Database

---

You can use Microsoft’s SQL Enterprise Manager or the delivered SQL script (<PS\_HOME>\scripts\createdb.sql for Microsoft SQL Server 2000) to create your database. If you decide to use Enterprise Manager to create your database you still need to review the script provided by PeopleSoft to create the database to make sure all the necessary options are selected. Regardless of the method you use, keep the following in mind:

- The name of the database must be in UPPERCASE, must not exceed eight characters, and must not start with a number.

- For performance reasons, we recommend placing the database data files and log files on separate physical drives (spindles) and using separate disk controllers.
- If you are creating the database remotely, confirm that you have installed client connectivity on the workstation.
- It is not a good practice to use the default login "sa" to create your databases. Use another system administrator you designate for this purpose. This will be your access ID.
- Your Access ID and its password must be eight characters or less.

Please carefully review the createdb.sql script before running it. The script includes instructions, as well as several default statements that you can customize for your environment.

### *Collation and sort order*

This script will create your database with the following collation:

```
COLLATE Latin1_General_BIN
```

The default collation for PeopleSoft databases is Latin1\_General\_BIN. If you want to use a collation other than Latin1\_General\_BIN, you will need to modify createdb.sql in the %PS\_HOME%\scripts directory and replace Latin1\_General\_BIN with the desired collation before running the script. For further information on selecting a collation refer to the first chapter in this guide.

See “Preparing for Installation.”

If you modify the collation for the database you may also have to modify the option in PeopleTools that controls the sort order after you set up PIA. A modification in the collation usually impacts the sort order of the database.

See “Setting Up the PeopleSoft Pure Internet Architecture.”

To set the appropriate sort order:

Some components of PeopleTools cannot rely on the database to sort data and must do so in memory. The sort order option on the PeopleTools Options page enables you to select which sort order should be used by PeopleTools when sorting data in memory.

See *Enterprise PeopleTools 8.49 PeopleBook: Global Technology*, “Sorting in PeopleTools.”

You should set this option soon after you have completed the installation of the database and your PIA environment (in the chapter “Setting Up the PeopleSoft Pure Internet Architecture”). Choose the option that most closely approximates the sort order that you selected when creating the database.

1. Select PeopleTools, Utilities, Administration, PeopleTools Options.
2. Select an option from the Sort Order Option drop-down list box.
3. Click Save.

### *Database options*

The script will turn on several database options with the following commands:

```
ALTER DATABASE <DBNAME>
SET ARITHABORT ON
go
ALTER DATABASE <DBNAME>
SET QUOTED_IDENTIFIER ON
go
```

where *<DBNAME>* is your database name. The option `QUOTED_IDENTIFIER` can be changed at the connection properties section on ODBC and Query Analyzer. Make sure this option is enabled for any client connecting to your PeopleSoft database that will execute SQL.

---

**Note.** If you create your database through the Enterprise Manager be sure to turn ON both options in this section manually. You may run the previous commands through Query Analyzer after creating the database.

---

See “Preparing for Installation,” Installing Client Connectivity.

#### *Maximum file size*

Set the maximum file size for data files and transaction log to unrestricted file growth. Once your data is imported, file growth can be restricted as needed.

If you are using the `createdb.sql` script you can change the growth option for your database device files by modifying the portion of the script similar to that below. Remove the comment characters (“-”) and edit the statements to fit your environment:

```
-- ALTER DATABASE <DBNAME> MODIFY FILE (NAME = <DATANAME>, MAXSIZE = UNLIMITED)
-- go

-- ALTER DATABASE <DBNAME> MODIFY FILE (NAME = <LOGDATANAME>, MAXSIZE = UNLIMITED)
-- go
```

If you are using Enterprise Manager to create a PeopleSoft database, specify unrestricted file growth, but do not turn on any special options—unless you are using *Truncate Log on Checkpoint* for data import. You will set some database options by running the script `ADDOBJ.SQL` in a subsequent task.

---

## Task B-3: Configuring ODBC Data Source

Now that you have established your database name and location, you can set up an ODBC data source on the client workstation.

---

**Note.** With SQL Server 2005 a new connectivity driver, named “Sql Native Client” or SNAC, has been introduced. ensure that you use this driver when installing with SQL Server 2005.

---



---

**Note.** You will need to configure a separate ODBC data source for each additional database that you create.

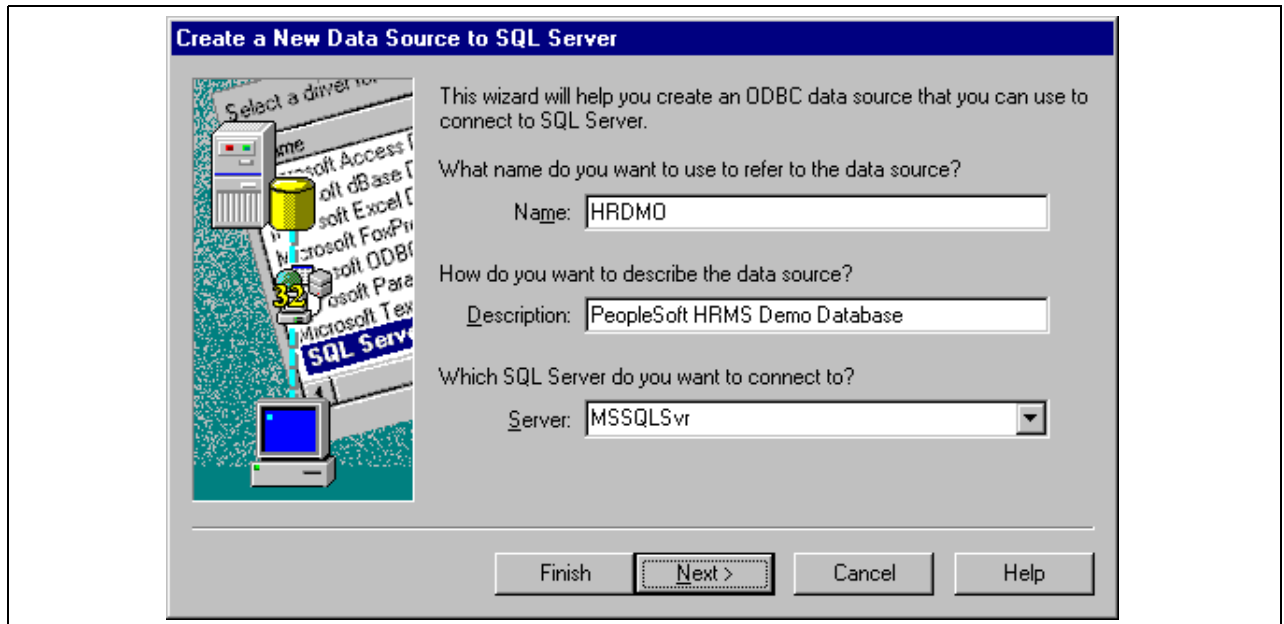
---

The following procedure shows the current ODBC SQL Server Setup. If a later version of `SQLSRV32.DLL` is released, these dialog boxes may look different, and some of these options may change.

To configure an ODBC data source using ODBC Administrator:

1. In the Create a New Data Source to SQL Server dialog box, enter the database name in the Name text box and the server name in the Server text box.

You must enter the data source name in uppercase. Filling in the Description text box is optional. Click Next.

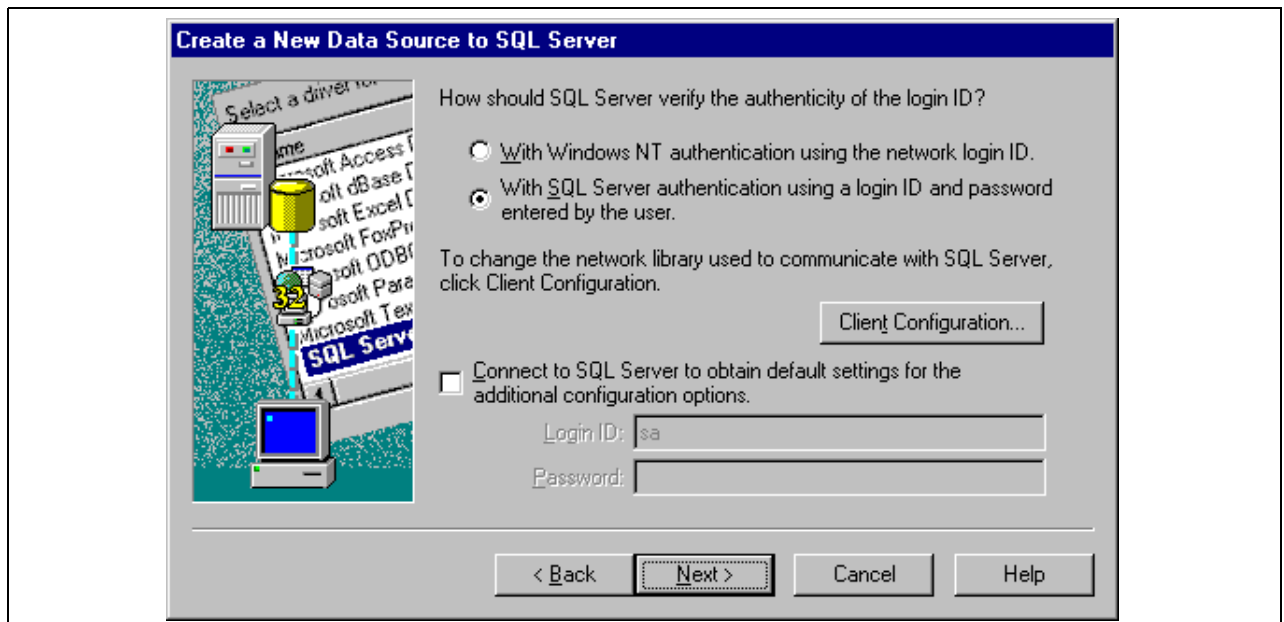


Entering the Name, Description, and Server in the Create a New Data Source to SQL Server dialog box

2. Use SQL Server Authentication to verify the authenticity of the login ID and select the option Connect to SQL Server to obtain default settings for the additional configuration options.

Click Next. For information on using different Client Configuration options consult the PeopleBook.

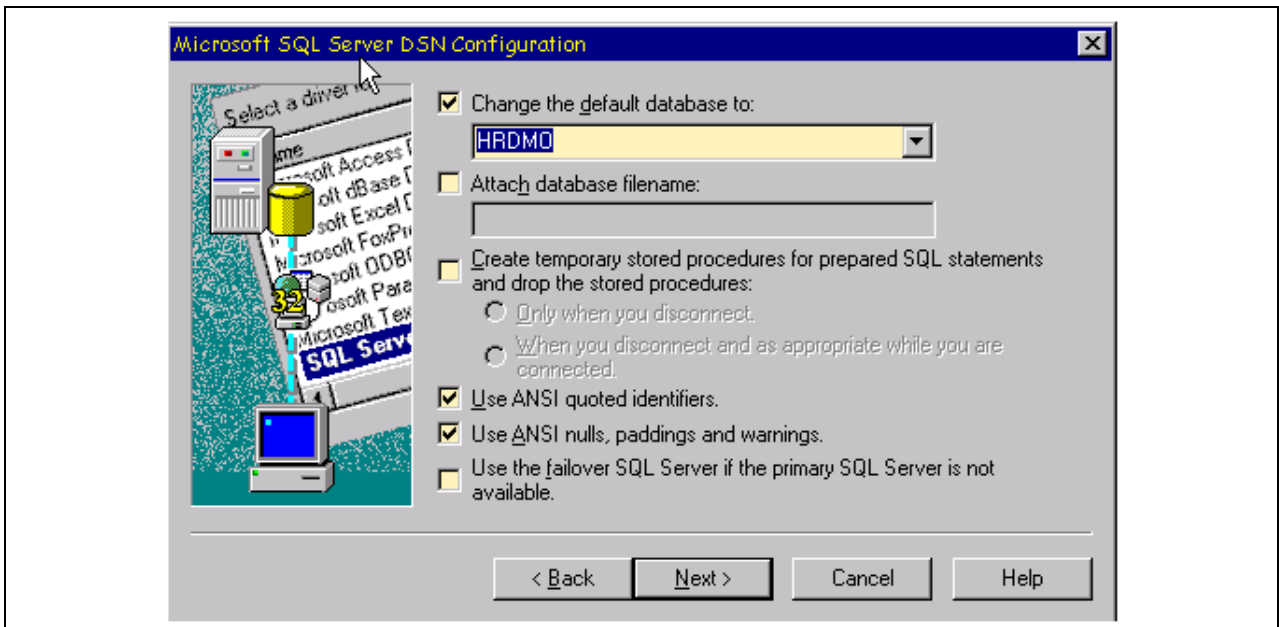
See *Enterprise PeopleTools 8.49 PeopleBook: Data Management*.



Selecting the authentication type and configuration options in the Create a New Data Source to SQL Server dialog box

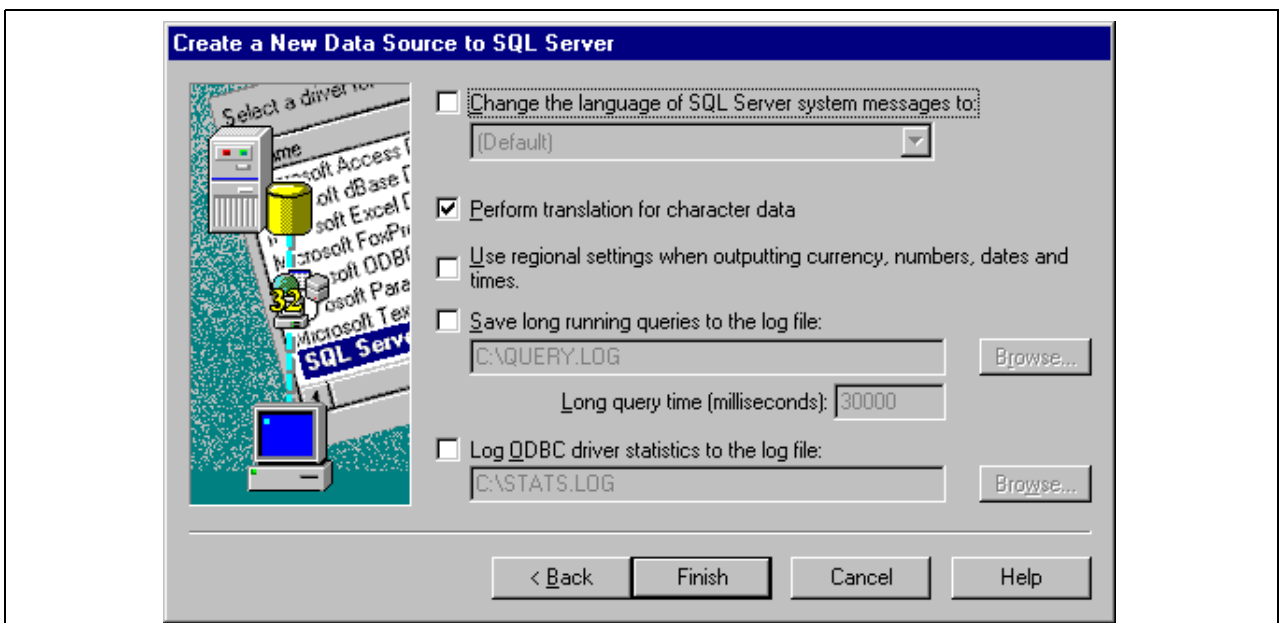
3. Change the default database to your database name—be sure to enter your database name in uppercase. For PeopleSoft, the data source name and the database name must be the same. Leave the options Use ANSI quoted identifiers and Use ANSI nulls, padding and warnings selected. Make sure to deselect (unless it is grayed out) the option Create temporary stored procedure for Prepared SQL Statements and

drop the stored procedures. We do not use temporary stored procedures with SQL Server to prepare execution plans. Click Next.



Entering the database name and select your ANSI options in the Create a New Data Source to SQL Server dialog box

4. Click Finish at the next dialog box.



Finalizing the ODBC setup in the Create a New Data Source to SQL Server dialog box

---

## Task B-4: Running ADDOBJ.SQL

Before running Data Mover, use a query tool, such as the Query Analyzer, to run the following SQL script while in the PeopleSoft database:

```
<PS_HOME>\SCRIPTS\ADDOBJ.SQL
```

Please read the instructions in the SQL script carefully and review it with your DBA before running it. You will need to edit certain parameters like the database name "<DBNAME>".

This script creates user-defined data types and system catalog views that both Data Mover and PeopleTools use. It also enables the *ANSI Null Default* option.

---

**Note.** Make sure that you set the context of your session in your PeopleSoft database before you run the script. If this script is accidentally run in the master database, it will yield an error. See the script for more details. Running ADDOBJ.SQL is a prerequisite to running Data Mover against your database. To check that the *ANSI Null Default* option has been set, run the following T-SQL command via the Query Analyzer or osql: `sp_dboption <databasename>`

---

---

## Task B-5: Setting Up Connect ID

This section discusses:

- Understanding Connect ID
- Defining the Connect ID
- Creating the Connect ID

### Understanding Connect ID

With PeopleTools 8.4, you establish connections to a database simply by using the connect ID, which allows you to associate multiple PeopleSoft operators to the same connect ID. The connect ID has the minimum privileges required to connect to the database—that is, it has only SELECT privileges on specific PeopleTools tables. After connection, PeopleSoft Security uses the operator ID to control access to objects in the database. The PeopleSoft sign-on process validates the connect ID on the server, rather than the operator ID. Connect ID simplifies database security maintenance. You don't have to maintain access for all PeopleSoft users, just for the connect ID.

The connect ID is granted access using the following script:

*Connect.sql:* Allows access to the server via the connect ID by executing the `sp_login` stored procedure. Access to the PeopleSoft database is then granted to the connect ID by executing the `sp_grantdbaccess` stored procedure.

In order to work, the connect ID and connect password must be specified at the client configuration manager or the configuration file of any two-tier client accessing the application.

### Task B-5-1: Defining the Connect ID

When logging into a PeopleSoft database in two-tier mode, the user enters a Database Name, User ID, and Password in the PeopleSoft Signon dialog box.

| Log-in Processing Steps                                                                                  | Related Database SQL Operations                                                               |
|----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| The access to SQL Server and the PeopleSoft Database is established with the Connect ID not the User ID. | Connect=PT84/people/people                                                                    |
| Check PSSTATUS                                                                                           | SELECT OWNERID, TOOLSREL,<br>LASTREFRESHDTM, LASTCHANGEDTTM<br>FROM PSSTATUS                  |
| Validate the User ID and Password                                                                        | SELECT VERSION, OPERPSWD, ENCRYPTED,<br>SYMBOLICID, ACCTLOCK FROM PSOPRDEFN<br>WHERE OPRID =1 |
| Get the Access ID and Password                                                                           | SELECT ACCESSID, ACCESSPSWD, ENCRYPTED<br>FROM PSACCESSPRFL WHERE SYMBOLICID =1               |
| Disconnect Connect ID                                                                                    | Disconnect                                                                                    |
| Login using the Access ID                                                                                | Connect=PT84/ACCESSID/ACCESSPWD                                                               |

At this point, access is governed by PeopleSoft security, which determines what applications a specific user ID has access to.

## Task B-5-2: Creating the Connect ID

To create connect ID:

1. Start Query Analyzer and connect to the PeopleSoft database using a System Administrator login.
2. Open the script <PS\_HOME>\scripts\connect.sql.
3. Edit the script to use the desired Connect ID and Connect Password—for example, people/people.

---

**Note.** Your Connect ID and its password must each be eight characters or less.

---

4. Run the script. (Make sure you are executing the script against the PeopleSoft database, not the master database.)

---

## Task B-6: Creating Data Mover Import Scripts

This task explains how to create the Data Mover Import script, which is used to populate the PeopleSoft database with data. The following procedure describes how to run Database Setup Wizard from Data Mover to generate the import scripts.

---

**Note.** This task and the next one ("Running Data Mover Import Scripts") should be executed from a Windows client machine. Before you can load PeopleSoft data from a Windows client machine, you need to install the PeopleTools CD and PeopleSoft Application CD to the Windows client machine and be sure to select File Server and Database Server.

---



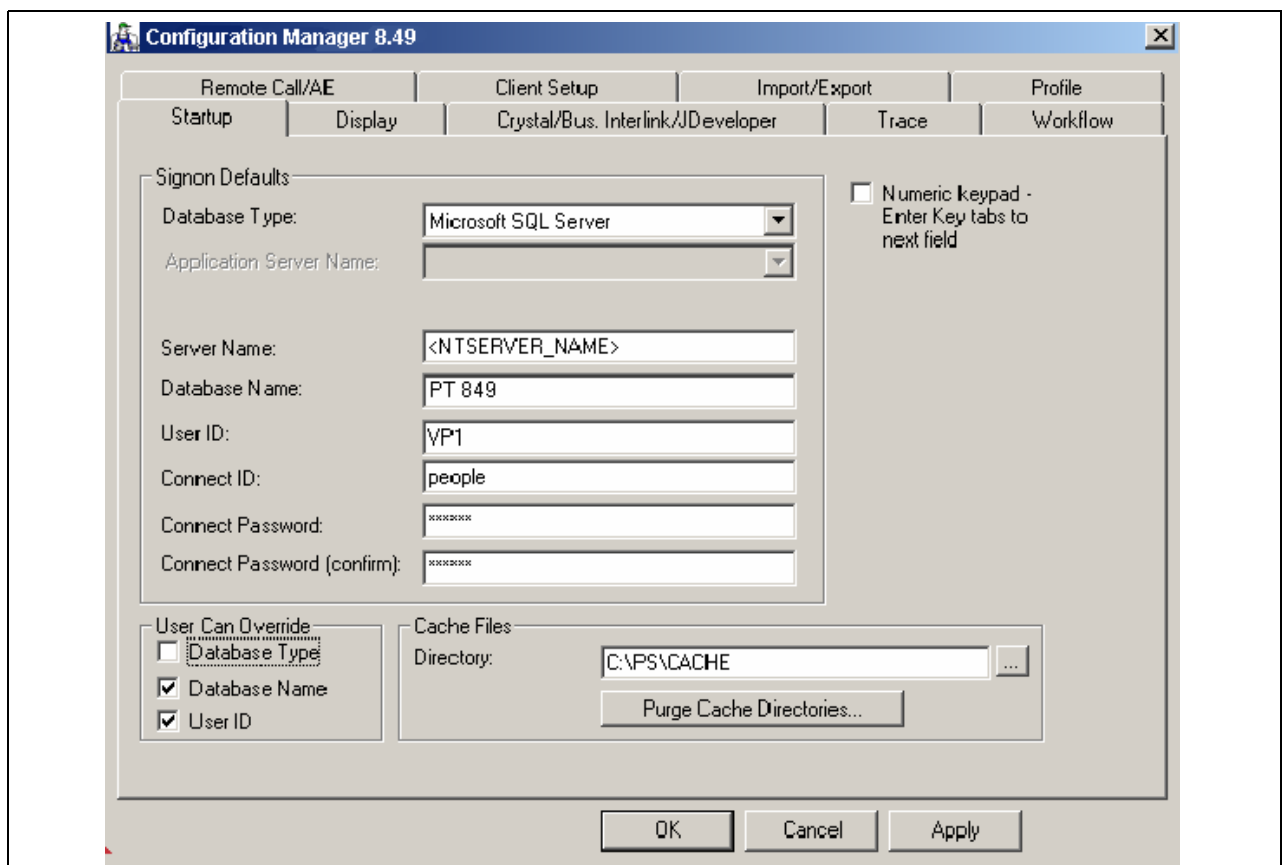
**Note.** If you want to run Data Mover on the same machine as the application server or Process Scheduler, you need to start a new telnet session without running PSADMIN and make sure the PS\_SERVER\_CFG environment variable is not set. PS\_SERVER\_CFG is only set when you run PSADMIN, so if you have not run it before this should not be a concern. When running Data Mover, you do not need to run PSADMIN. Consult PeopleBooks documentation for the details on using PS\_SERVER\_CFG to set up tracing in Data Mover.

See *Enterprise PeopleTools 8.49 PeopleBook: Data Management*

To create the Data Mover import script using Data Mover:

1. Verify that the same connect ID was used in the Database Setup and Configuration Manager panel displayed below.

If you accepted all defaults, the connect ID/password is: people/people (password contains the number “1”).



Configuration Manager dialog box

2. Run Data Mover in bootstrap mode, using the access ID “sa” as the user id; this should be the user that creates the database.

When connecting to Data Mover using your access ID, you automatically sign on in bootstrap mode.

3. To invoke the Database Setup wizard, choose File, Database Setup.
4. Select your database platform.

---

**Note.** Choose the Database Type—Unicode or Non-Unicode—that you selected in the section on multilingual strategy. If you choose Non-Unicode, select the character set you decided upon in that section.

---

See “Preparing for Installation,” Planning Multilingual Strategy.

5. Select your character set and click Next.

---

**Note.** DB Setup does not actually modify the character set of your database. That is done by your DBA during database creation. DB Setup will create customized scripts based on your selections.

---

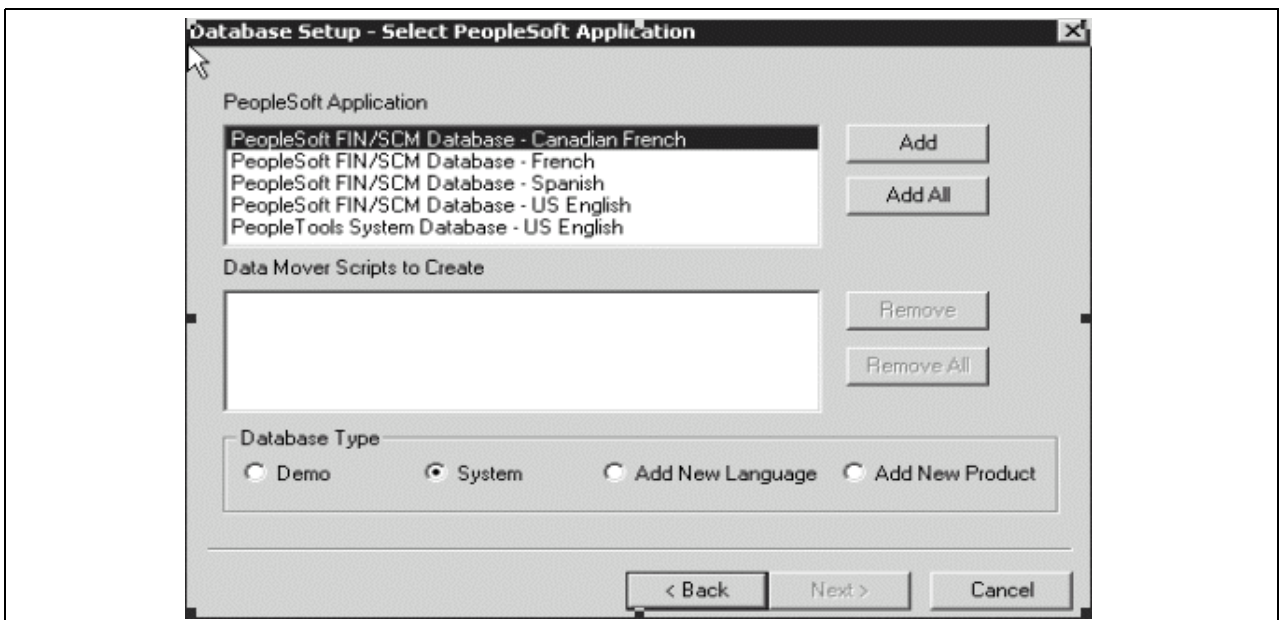


---

**Note.** When you select a non-Unicode character set, only the characters within that character set can be stored in your database. If you require characters from multiple character sets or scripts to be stored in a single database, PeopleSoft recommends that you create your database using Unicode.

---

6. Select your PeopleSoft Application and click Next.



Selecting a PeopleSoft application in the Database Setup dialog box

7. Select the Demo or System radio button, depending on which type of PeopleSoft database you are installing.
8. Select the Products for which you want to create a Data Mover script from the PeopleSoft Application list box, and move the items you have selected into the Data Mover Scripts to Create list box by clicking on the Add or Add All button.

Only the products and languages that you have licensed will be available.

If you installed the Multilanguage CD, each application will be listed several times, once for each language. If you are installing languages other than English, make sure to select the appropriate language data files for each application you select in English. This will load the translated database objects.

See “Preparing for Installation,” Planning Multilingual Strategy.

If you are installing an application in any language other than English, you must also select the English component of the application. For example, if you select PeopleSoft Fin/SCM - French, you must

also select PeopleSoft Fin/SCM Database - US English. This ensures that you install the necessary base-language components.

9. Set the database parameters and click Next.

Selecting the database parameters in the Database Setup dialog box

- *Database Name*: The database name that users will enter on the PeopleSoft signon screen. This corresponds to the owner ID. It can be up to eight characters long and must be entered in uppercase. This name must be the same as that of the ODBC data source.
- *Symbolic ID*: This is used as the key to retrieve ACCESSID and ACCESSPSWD from PSACCESSPRFL. For initial installation set it equal to the Database Name. The symbolic ID cannot be longer than eight characters.
- *Access ID*: This is the user you used to create the database. This value is case sensitive. You will use the access ID every time you want to sign on to Data Mover in bootstrap mode.

---

**Note.** You must limit access ID and connect ID to eight characters or less.

---

- *Access ID Password*: This is the PeopleSoft access ID password defined in chapter 1.
- *Connect ID*: This is the connect ID that is used for the initial connection to SQL Server. The standard PeopleSoft configuration delivers people as the connect ID.

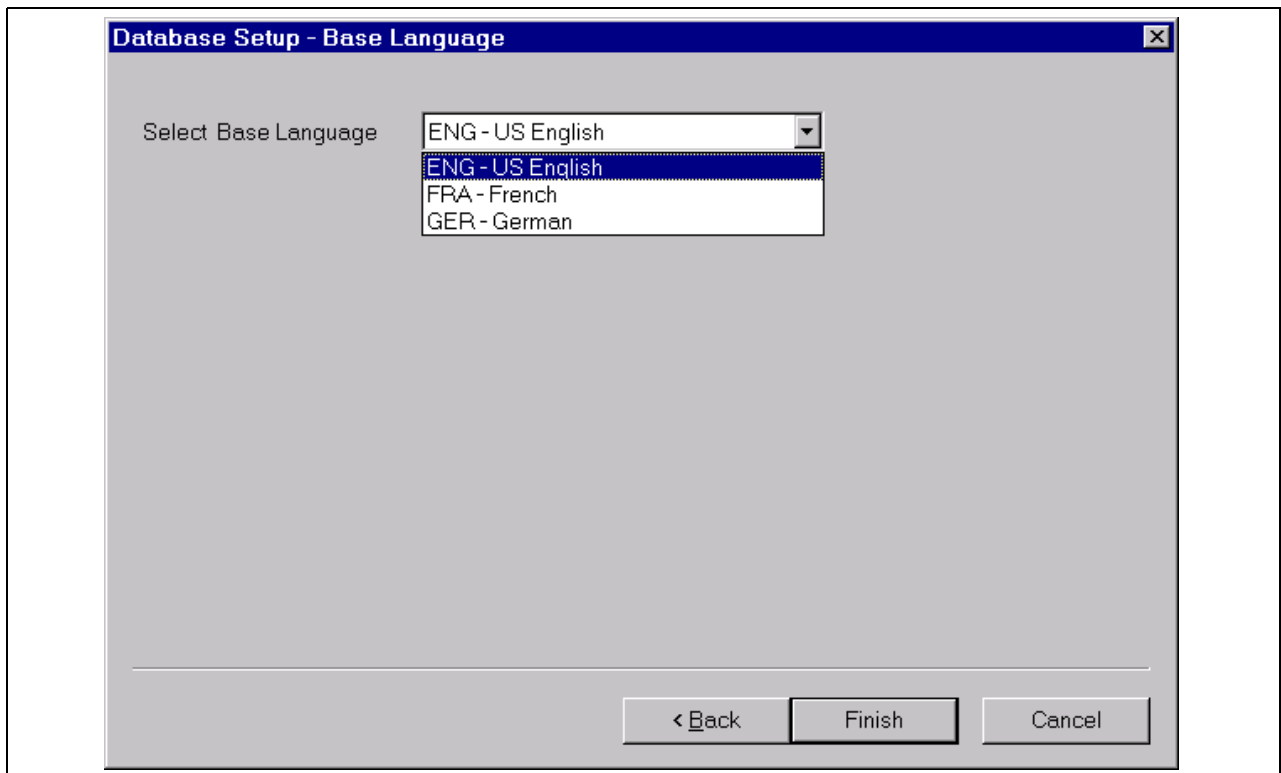
10. Select your database's base language and click *Finish*.

---

**Note.** This screen appears only if you selected a database for a language other than English. If you see this screen it is critical to select the correct base language. When you select a base language other than ENG, DBSETUP generates the Data Mover import script with the SWAP\_BASE\_LANGUAGE command to swap the base language.

---

At this point you are in Data Mover, with the DMS script you just created ready to run.



Selecting a base language in the Database Setup dialog box

---

**Note.** If you have not already done so, read the first chapter before determining whether to install multiple languages and whether to change your base language.

---

---

**Note.** If you are creating a database and want to load PeopleSoft-provided translations for non-English languages, you must load English (ENG) in addition to the foreign language components.

---

---

**Note.** If you are creating a non-Unicode database, you must ensure that the languages you select are all supported by the character set you used to create your database.

---

See “Preparing for Installation,” Planning Multilingual Strategy

---

**Note.** All PeopleSoft releases are shipped with English as the database's base language. Therefore when selecting components for the Data Mover Import script, you must select the English components in addition to any other languages you have licensed. During the Database Setup wizard, you need to select the database's base language that you plan to use most frequently. If your database's base language is different than the Database Setup wizard generate the `SWAP_BASE_LANGUAGE` command in the Data Mover Import script to swap the language.

---

## Task B-7: Running Data Mover Import Scripts

This section discusses:

- Understanding Data Mover Import Scripts
- Populating Tables in the PeopleSoft Database
- Validating Files
- Troubleshooting
- Improving Performance

## Understanding Data Mover Import Scripts

Now you will run the Data Mover scripts (DMS) that you created in the preceding task to import the data for your PeopleSoft database. The Data Mover script creates either a system (SYS) or a demo (DMO) database.

When you initially logged onto Data Mover to create the DMS scripts, you logged in using bootstrap mode. *Bootstrap mode* means starting Data Mover with the database Access ID and password, rather than with a PeopleSoft user ID. You need to use bootstrap mode to run the Data Mover import script, because there are not yet any PeopleSoft security tables in the database.

---

**Note.** If you want to run Data Mover on the same machine as the application server or Process Scheduler, you need to start a new telnet session without running PSADMIN and make sure the PS\_SERVER\_CFG environment variable is not set. PS\_SERVER\_CFG is only set when you run PSADMIN, so if you have not run it before this should not be a concern. When running Data Mover, you do not need to run PSADMIN.

---

When you start Data Mover in bootstrap mode, the word “BootStrap” appears in the Data Mover status bar.

See *Enterprise PeopleTools 8.49 PeopleBook: Data Management*.

## Task B-7-1: Populating Tables in the PeopleSoft Database

To populate tables in the PeopleSoft database:

1. The DMS import script for your application will contain hard-coded file names for log files and data files.  
Modify the DMS script if you have moved any files from the delivered directories or want to write log files to another location than that specified in the script.
2. Select File, Run to execute the script.

When you run the script, Data Mover typically does the following:

- **IMPORT \***  
Create all the PeopleTools and application tables with their indexes.
- **ENCRYPT\_PASSWORD \***  
Encrypt security information for the database.
- **CREATE\_TRIGGER \***  
Create application required triggers.
- **REPLACE\_VIEW \***  
Create PeopleSoft views.
- **CREATE\_TEMP\_TABLE \***  
Create PeopleSoft temporary tables.

---

**Note.** When installing an application database, Data Mover may fail when creating the view PTLT\_SCOMP\_VW1 if the database was delivered on a PeopleTools release prior to 8.48. This error may be ignored. The view will be created correctly in a later step.

---

## Task B-7-2: Validating Files

Each script will produce .LOG files. The log files are located in the directory you specified in the Data Mover Script.

Examine these files after each run to make sure that all the commands were executed successfully.

## Task B-7-3: Troubleshooting

If your script has stopped midway (this can happen for a number of reasons) you need to edit the script and start again.

To edit and restart the DMS script:

1. Determine the record that was being imported (that is, which IMPORT command was running) when the script stopped. (See the note below for additional information on determining where the script stopped.)

---

**Note.** When building a DMO database or a multilingual database, adding the SET START statement can be tricky because the Data Mover script used to load the database will include more than one IMPORT statement. The key is to view the LOG files and determine which IMPORT section of the script Data Mover failed on. If the failure occurred during the first IMPORT, add the SET START statement before the first IMPORT \*; statement (no problem with this one). If the failure occurred during a subsequent IMPORT, comment out all preceding IMPORT \*; statements and add the SET START statement before the IMPORT \*; statement of the section in which the failure occurred. This is very important. If you see any 'unique index constraint' error messages in the 'Create Indexes' step (found later in the chapter), your IMPORT script failed during a subsequent IMPORT but the SET START statement was added to the first IMPORT. In this situation, you can run the Data Mover script in its originally generated form, with only one modification. In the first IMPORT section, change the statement IMPORT \*; to REPLACE\_DATA \*;. This will delete all the data in the tables, and re-import it. This process will take some time to run, and you will need to separately create each of the indexes that failed.

---

2. Invoke Data Mover outside of the Database Configuration Wizard by selecting Start, Programs, PeopleTools 8.4 Installation, Data Mover (or going to <PS\_HOME>\bin\client\winx86 and running psdmt.exe).

The PeopleSoft Logon window appears.

3. Log on using the Access ID you specified when you created your Data Mover scripts with the Database Setup program.

This will start Data Mover in *bootstrap mode*. The input window should display the DMS for the database, named <dbname>MSS.dms.

4. If necessary, browse to the directory where you created the script (the default is <PS\_HOME>\scripts). The \scripts directory will contain one or more DMS scripts that need to be run.
5. Select File, Open and choose the appropriate DMS script from Data Mover.
6. Add the following line before the offending IMPORT command (the one being executed when the failure occurred):

```
Set start <RECORD NAME>;
```

where <RECORD NAME> is the name of the record that failed. Make sure to review the Data Mover log file to see where the script failed and locate the last record that imported successfully. The 'SET START' will begin the Data Mover import at the <RECORD NAME> specified.

---

**Note.** It is a good idea to change the name of the log file in the script before each attempt at running it. This ensures that you have a separate log file for each attempt, if you run the import more than once.

---

*Example:*

If the script stops and the table is partially inserted with a message similar to this one:

```
Importing PSPNLFIELD
Rows inserted into PSPNLFIELD
```

```
3000
```

First drop the partially inserted table (for example, record) by using the DROP TABLE command, and then restart Data Mover at the record that failed using the SET START command and continue the Data Mover import. With PeopleTools 8.4, this can be done in a single pass.

Add the following lines before the offending IMPORT command (the one being executed when the failure occurred):

```
SET START <RECORD NAME>;
```

```
DROP TABLE <RECORD NAME>;
```

where <RECORD NAME> is the name of the record that failed. Make sure to review the Data Mover log file to see where the script failed and locate the last record that imported successfully. The 'SET START' will begin the Data Mover import at the <RECORD NAME> specified.

*Example:*

**Before:**

```
REM - PeopleTools System Database - US English
/
SET LOG ptengs.log;
SET INPUT ptengs.db;

SET COMMIT 30000;

SET NO VIEW;
SET NO SPACE;
SET NO TRACE;
SET UNICODE OFF;
IMPORT *;
```

**After:**

```
REM - PeopleTools System Database - US English
/
SET LOG ptengs.log;
SET INPUT ptengs.db;

SET COMMIT 30000;
```

```
SET NO VIEW;
SET NO SPACE;
SET NO TRACE;
SET UNICODE OFF;
SET START PSPNLFIELD;

DROP TABLE PSPNLFIELD;

IMPORT *;
```

For the DROP Statement, for records with a recname without a leading PS, add PS\_ to the beginning of the recname; otherwise the table will not be found.

*Example:*

PS\_<RECNAME>

7. Re-start the script (File, Run Script).

## Task B-7-4: Improving Performance

The following tips can help you save time when running the Data Mover scripts:

- Run Data Mover on the database server.
- Run only a single instance of Data Mover, and do not have any other applications running during the import.
- In the PeopleSoft Configuration Manager, turn off all Trace options. Tracing during a DMS load will add considerable time to the process.
- Run Data Mover on the database server with the .db or .dat file located locally.

---

## Task B-8: Updating Database to Latest PeopleTools Release

This section discusses:

- Understanding Database Updates
- Cleaning Up Data
- Updating PeopleTools System Tables
- Updating PeopleTools Database Objects
- Updating PeopleTools Multilingual Objects
- Deleting Obsolete PeopleTools Database Objects
- Altering PeopleTools Tables
- Updating PeopleTools System Data
- Running PeopleTools Conversions
- Converting Integration Broker



- Changing the User Interface

## Understanding Database Updates

Your PeopleSoft application database may be on a PeopleTools release prior to the version that you are currently running. For you to be able to sign on to your database after running the Data Mover script to load your database, the PeopleTools versions for your database and your file server must match. The steps in this task ensure that your PeopleSoft database is in sync with the PeopleTools version that you are running.

---

**Note.** You will use Application Designer for several steps in this portion of the installation. Consult the Application Designer documentation if you have questions.

---

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Application Designer*

---

**Note.** If you are installing a PeopleTools System Database or if your database is delivered on PeopleTools 8.49, the delivered database already contains the updated PeopleTools objects. Skip this task and continue with the install at the task “Running Additional Data Mover Scripts.”

---

Here is a list of applications for which this task must be run because the version of the database that was shipped is different than the version of PeopleTools that you are running. If your application release is earlier than the release listed in the table, you must run this task:

| Application Release | Application Database Version | Requires Update to 8.49? |
|---------------------|------------------------------|--------------------------|
| CRM 8.9             | 8.45                         | Yes                      |
| CRM 9.0             | 8.48                         | Yes                      |
| ELS 8.8 SP1         | 8.43                         | Yes                      |
| ELS 9.0             | 8.47                         | Yes                      |
| EPM 8.9             | 8.46                         | Yes                      |
| EPM 9.0             | 8.48                         | Yes                      |
| Fin/SCM 8.9         | 8.46                         | Yes                      |
| Fin/SCM 9.0         | 8.48                         | Yes                      |
| HRMS 8.9            | 8.46                         | Yes                      |
| HRMS 9.0            | 8.48                         | Yes                      |
| Portal 8.9          | 8.46                         | Yes                      |
| Portal 9.0          | 8.48                         | Yes                      |
| RMS 8.9             | 8.45                         | Yes                      |
| RMS 8.95            | 8.46                         | Yes                      |
| SIM 8.9             | 8.45                         | Yes                      |

Verify your application and PeopleTools release information on Customer Connection. Navigate to Site Index, product releases (roadmaps and schedules), Release Definitions, select your product line, and then select the product you are installing. If the Tools version is not 8.49, you must run this task. Otherwise, continue to the task “Running Additional Data Mover Scripts.”

## Task B-8-1: Cleaning Up Data

If your database is delivered on PeopleTools 8.48 or higher, do *not* run this step, and instead, proceed to Updating PeopleTools System Tables. If your database is delivered on PeopleTools 8.47 or earlier, perform this step to clean out obsolete message data.

---

**Warning!** Performing this task when updating from PeopleTools 8.48 or later will wipe out current valid data that is needed for your system to function properly.

---

Message functionality and structure changed as of PeopleTools 8.48 and the old data is obsolete. Edit <PS\_HOME>\scripts\ptupgibdel.sql to delete data from the tables that only exist in the old PeopleTools release. Open the script and make the following modifications, and then run the modified script using your SQL query tool:

1. Search for the string “--- End of PT8.<xx> ---” where <xx> represents the last two digits of the PeopleTools release you are upgrading from.
2. Delete the entire portion of the script below this string.
3. Save the script as <PS\_HOME>\scripts\ptupgibdel8<xx>.sql where <xx> represents the last two digits of the PeopleTools release you are upgrading from, as determined in Step 1.

---

**Note.** Save the script using the naming convention shown above! This will preserve the original script for use in updating other databases at different PeopleTools releases.

---

4. Using a SQL query tool, run the ptupgibdel8<xx>.sql script against your PeopleSoft database.

## Task B-8-2: Updating PeopleTools System Tables

Run SQL scripts to update your PeopleTools system tables to the latest PeopleTools release (currently 8.49).

Use a query tool, such as the Query Analyzer, to run SQL scripts while in the PeopleSoft database.

1. Run the appropriate SQL scripts for your application version.

The following scripts are found in the <PS\_HOME>\scripts directory.

Use the scripts in the following table for non-Unicode databases:

| Application Database Version | Required Scripts for Non-Unicode Databases                                |
|------------------------------|---------------------------------------------------------------------------|
| 8.40                         | rel841, rel842, rel843, rel844, rel845, rel846, rel847, rel848 and rel849 |
| 8.41                         | rel842, rel843, rel844, rel845, rel846, rel847, rel848 and rel849         |
| 8.42                         | rel843, rel844, rel845, rel846, rel847, rel848 and rel849                 |
| 8.43                         | rel844, rel845, rel846, rel847, rel848 and rel849                         |
| 8.44                         | rel845, rel846, rel847, rel848 and rel849                                 |

| Application Database Version | Required Scripts for Non-Unicode Databases                                                        |
|------------------------------|---------------------------------------------------------------------------------------------------|
| 8.45                         | rel846, rel847, arel848 and rel849                                                                |
| 8.46                         | rel847, rel848 and rel849                                                                         |
| 8.47                         | rel848 and rel849<br><b>Note.</b> If you are installing ELM 9.0, run rel848n and rel849n instead. |
| 8.48                         | rel849<br><b>Note.</b> If you are installing a 9.0 application, run rel849n instead.              |
| 8.49                         | None                                                                                              |

Use the scripts in the following table for Unicode databases:

| Application Database Version | Required Scripts for Unicode Databases                                                                |
|------------------------------|-------------------------------------------------------------------------------------------------------|
| 8.40                         | rel841u, rel842u, rel843u, rel844u, rel845u, rel846u, rel847u, rel848u, and rel849u                   |
| 8.41                         | rel842u, rel843u, rel844u, rel845u, rel846u, rel847u, rel848u, and rel849u                            |
| 8.42                         | rel843u, rel844u, rel845u, rel846u, rel847u, rel848u, and rel849u                                     |
| 8.43                         | rel844u, rel845u, rel846u, rel847u, rel848u, and rel849u                                              |
| 8.44                         | rel845u, rel846u, rel847u, rel848u, and rel849u                                                       |
| 8.45                         | rel846u, rel847u, rel848u, rel849u                                                                    |
| 8.46                         | rel847u, rel848u, and rel849u                                                                         |
| 8.47                         | rel848u and rel849u<br><b>Note.</b> If you are installing ELM 9.0, run rel848un and rel849un instead. |
| 8.48                         | rel849u<br><b>Note.</b> If you are installing a 9.0 application, run rel849un instead.                |
| 8.49                         | None                                                                                                  |

- If the application database version you are installing is either 8.42 or 8.43, run the following SQL command:

```
DROP TABLE PS_PSMCFQUEUESLANG
```

---

**Note.** PS\_PSMCFQUEUESLANG may not exist in some 8.43 application databases. Do *not* drop the table PSMCFQUEUESLANG.

---

3. If the application database you are installing is 8.45 or lower, run the following SQL command:

```
DROP TABLE PSOPTSTATUS
```

4. Edit and run the grant.sql script in the <PS\_HOME>\scripts directory. This will grant permissions to the Connect ID.
5. Invoke Data Mover by running <PS\_HOME>\bin\client\winx86\psdmt.exe.  
The PeopleSoft Logon window appears.  
Log on using a valid PeopleSoft Operator ID, such as PS for HRMS or VP1 for FDM.
6. Run the storedddl.dms Data Mover script in the <PS\_HOME>\scripts directory.

---

**Note.** Comment the other platform-specific scripts according to your platform

---

This will update your platform-specific DDL model statements.

Log out of Data Mover for the next step.

7. Invoke Data Mover by running <PS\_HOME>\bin\client\winx86\psdmt.exe.  
The PeopleSoft Logon window appears.  
Log on using the access ID you specified when you created your Data Mover scripts with the Database Setup program.  
This will start Data Mover in bootstrap mode.
8. Run the msgtlsupg.dms Data Mover script in the <PS\_HOME>\scripts directory.  
This will update the PeopleTools messages in your database.

## Task B-8-3: Updating PeopleTools Database Objects

To update PeopleTools database objects to the current release you must be in Application Designer. The Copy from File functionality lets you update your PeopleTools database objects from a file. You must perform this step to bring the database objects in sync with the PeopleTools release. Failure to run this step will introduce problems to your environment.

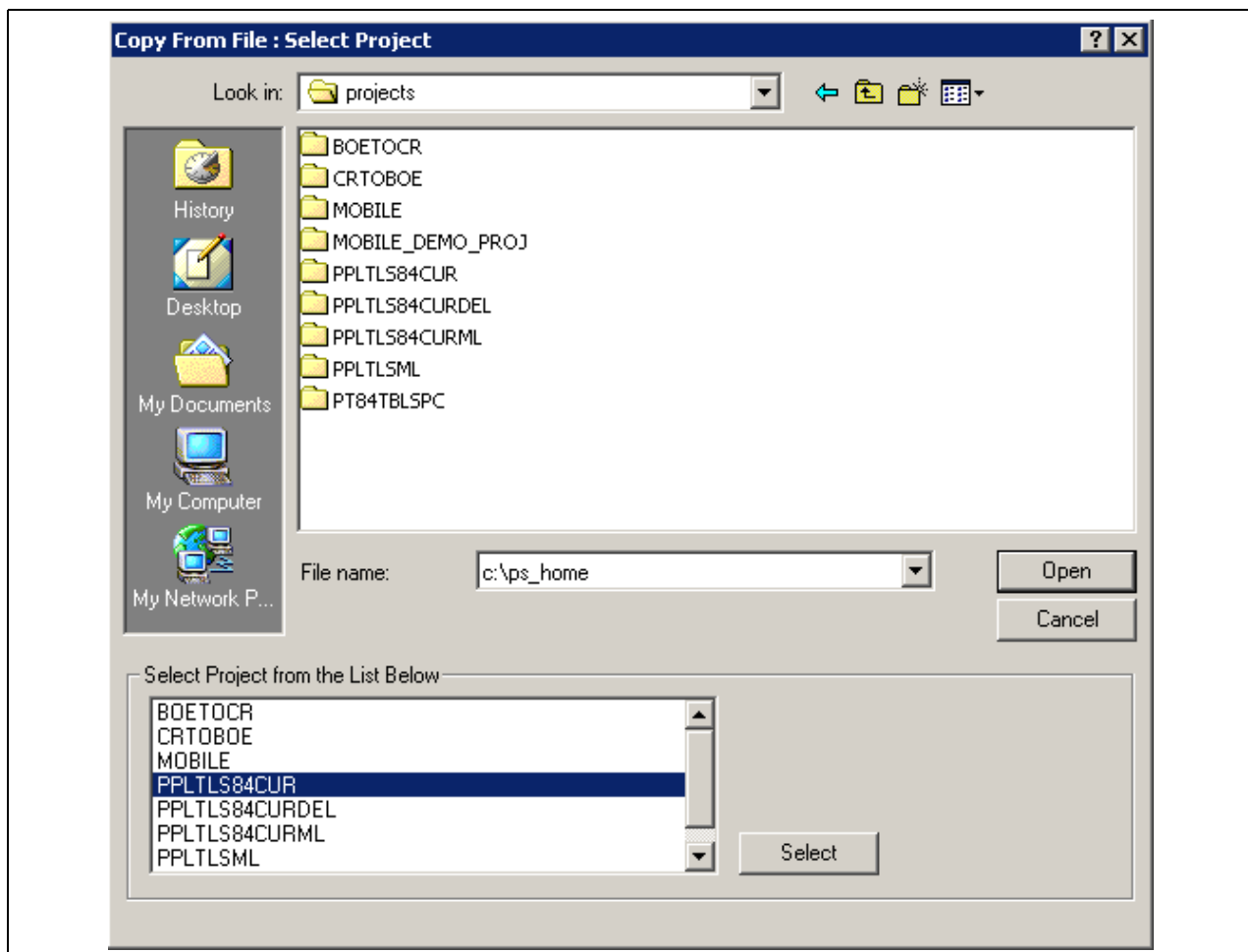
To update PeopleTools database objects:

1. Launch Application Designer and sign on to your database with a valid PeopleSoft user ID.
2. Select Tools, Copy Project, From File.
3. In the resulting dialog box, change the import directory to <PS\_HOME>\projects, select PPLTLS84CUR from the list of projects and click the Select button.

---

**Note.** If the project already exists on the database, a confirmation dialog box appears asking if you want to overwrite the existing project. Select the File radio button and click OK to overwrite the existing project.

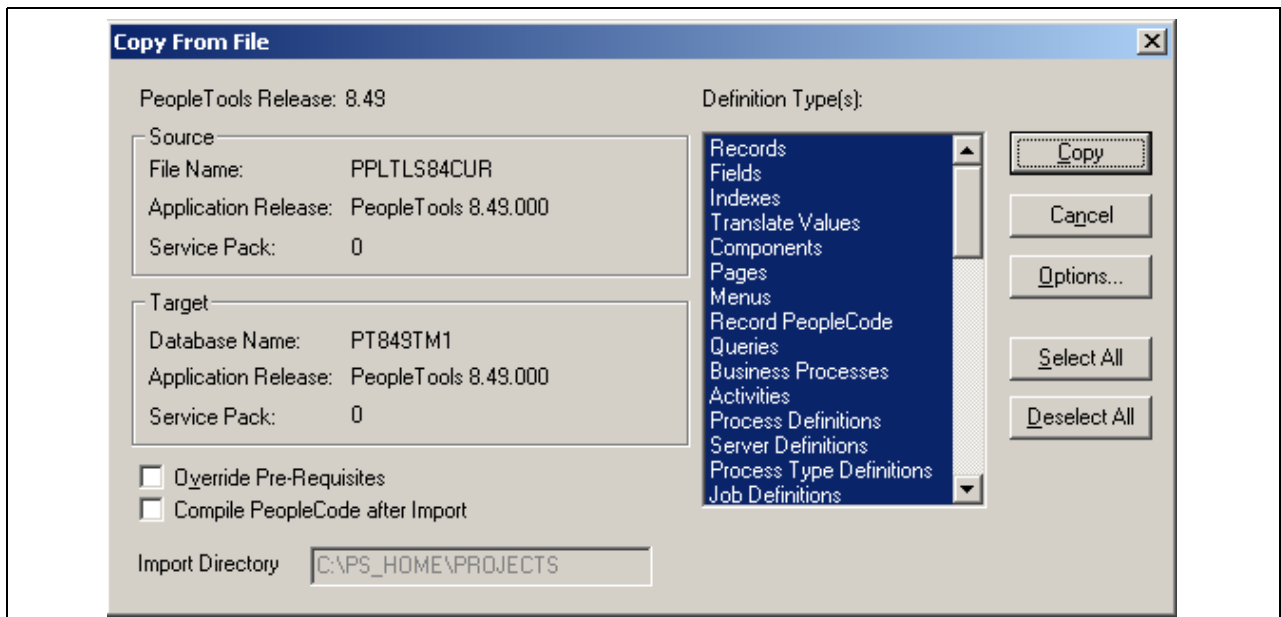
---



Selecting PPLTLS84CUR in the Copy From File dialog box

4. The Copy From File dialog box appears.

Select all object types and then click the Copy button. When the progress window disappears, the project has been copied.



The Copy From File dialog box showing that PPLTLS84CUR will be copied

If you see the following types of messages in the output window do not worry; they are acceptable because the field label properties were copied with the object definition:

- Definition Name: OPERPSWD.OPERPSWD not copied, entire definition already copied (62,32).
- Definition Name: OPRID.NEW not copied, entire definition already copied (62,32).

## Task B-8-4: Updating PeopleTools Multilingual Objects

If you are currently updating a PeopleSoft Multilingual Database, you must also apply the project PPLTLS84CURML, which contains the translations of the PeopleTools Objects.

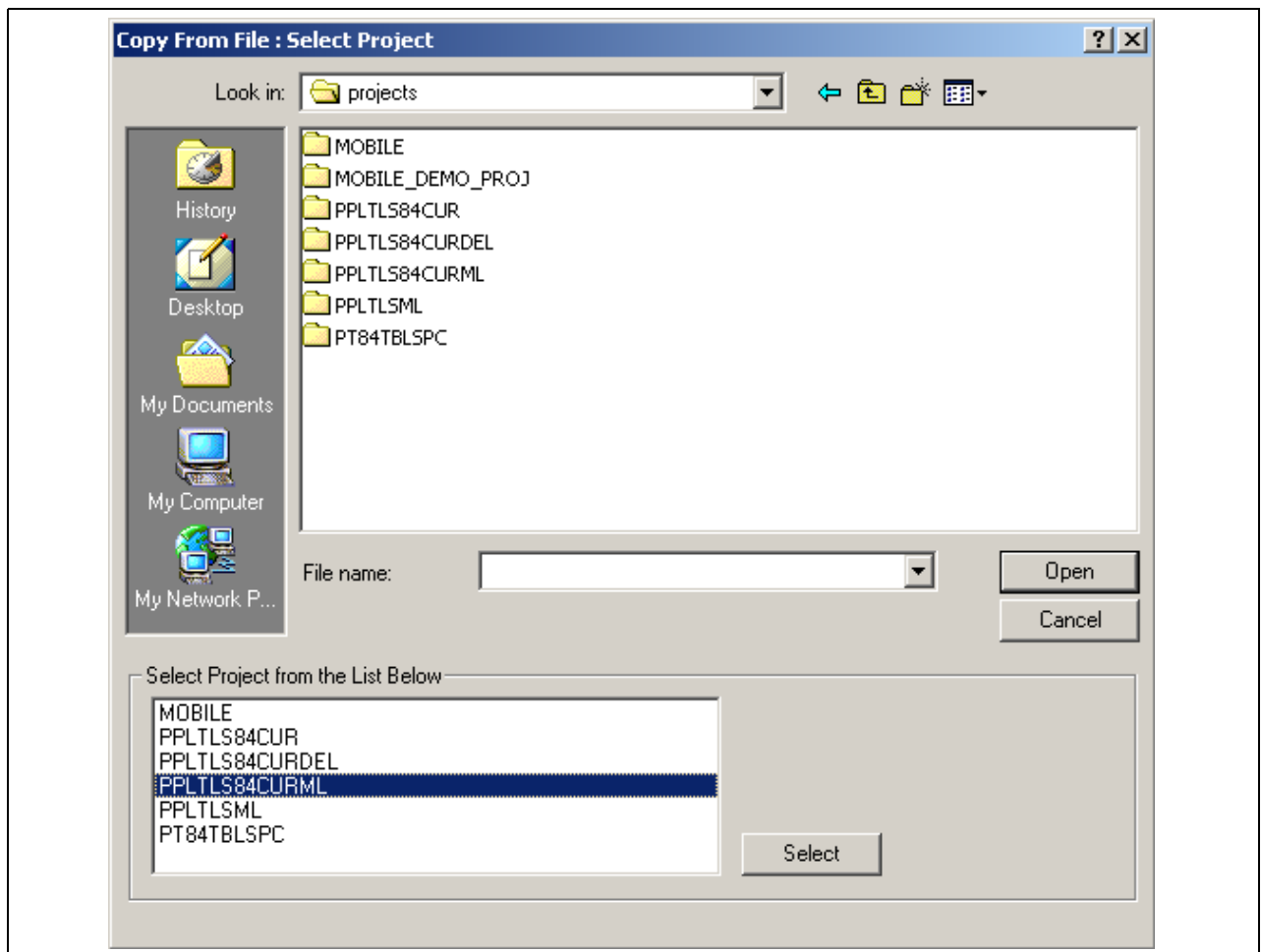
**Note.** If you have licensed and installed French into this database, copy the PPLTLSML project instead of the PPLTLS84CURML project for French *only*. Substitute the project name PPLTLSML instead of PPLTLS84CURML in the instructions below. Copy the PPLTLS84CURML project to update any non-French languages that are installed in the database.

To update PeopleTools database objects to the current release you must be in Application Designer. The Copy from File functionality lets you update your PeopleTools database objects from a file.

To apply the translation project for PeopleTools 8.49:

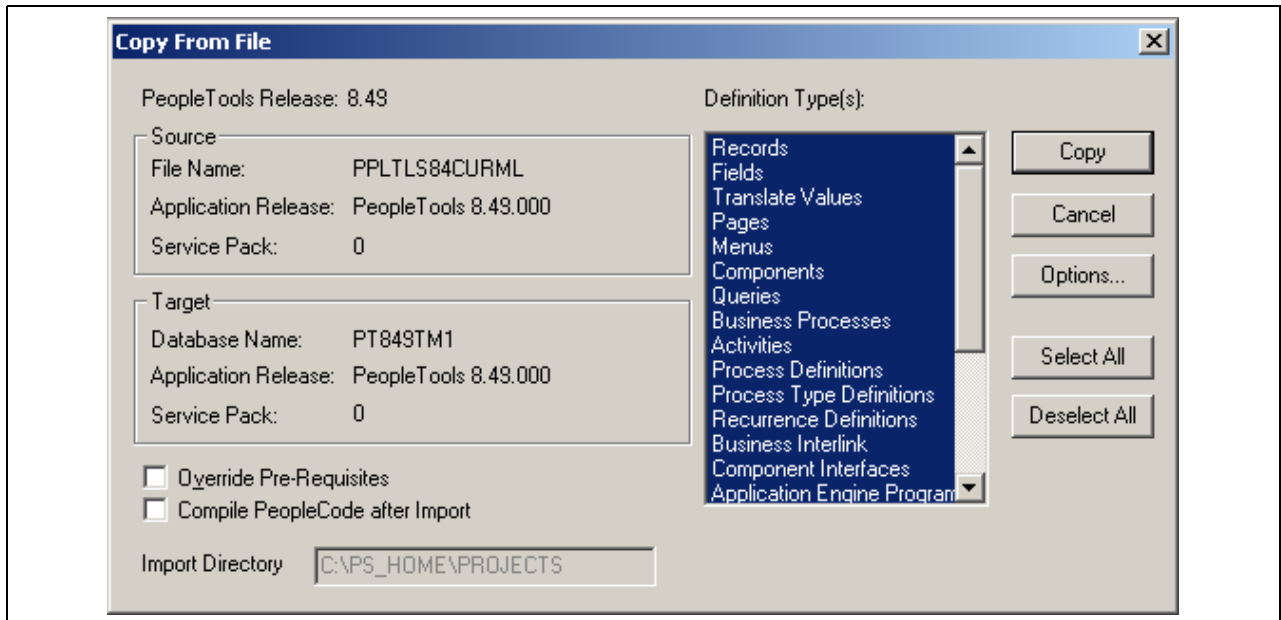
1. Bring up the Configuration Manager and select the Display tab.  
Ensure that the language matches the base language of your database. Always run upgrade copy as a base language user.
2. Launch Application Designer and sign on to your database with a valid PeopleSoft user ID.
3. Select Tools, Copy Project, From File.
4. In the resulting dialog box, change the import directory to <PS\_HOME>\projects.
5. Select PPLTLS84CURML from the list of projects and click the Select button.

**Note.** If the project already exists on the database, a confirmation dialog box appears asking if you want to overwrite the existing project. Select the File radio button and click OK to overwrite the existing project.



Selecting PPLTLS84CURML in the Copy From File dialog box

6. The Upgrade Copy dialog box appears.  
Make sure that all object types are selected.
7. Click the Options button, select the Copy Options tab, and ensure that only the non-English languages you have installed are selected.  
Please note that English and Common should *not* be selected.
8. Select the languages that you are currently installing from the Copy Options dialog box.
9. Click the Copy button.



The Copy From File dialog box showing that PPLTLS84CURML will be copied

When the progress dialog box disappears, the project has been copied.

## Task B-8-5: Deleting Obsolete PeopleTools Database Objects

This process removes obsolete PeopleTools objects from your database. To update PeopleTools database objects to the current release you must be in Application Designer. You will use the Copy from File functionality to delete the obsolete objects from the database.

To delete obsolete PeopleTools database objects:

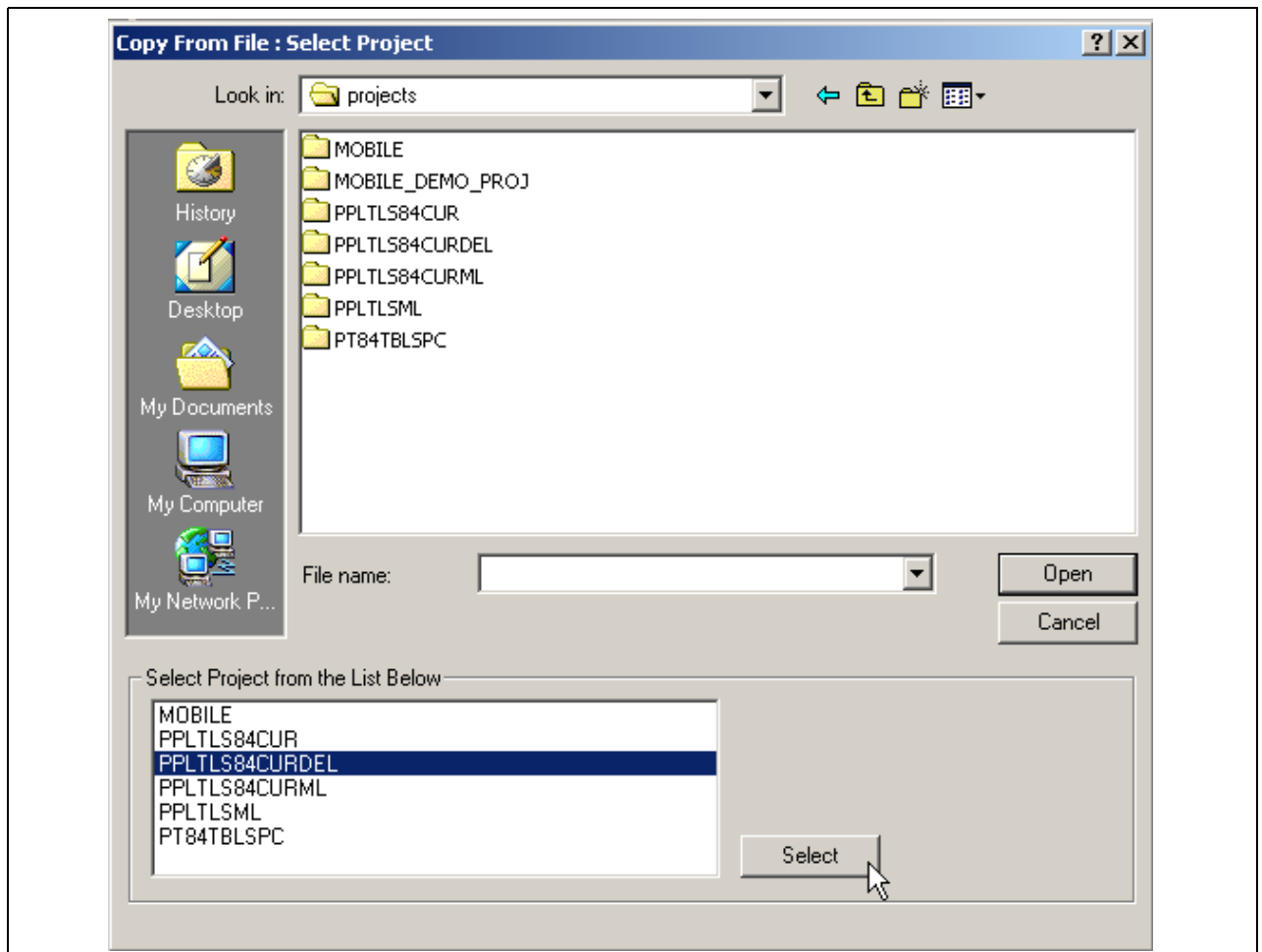
1. Launch Application Designer and sign on to your database with a valid PeopleSoft user ID.
2. Select Tools, Copy Project, From File.
3. In the resulting dialog box, change the import directory to <PS\_HOME>\projects, select PPLTLS84CURDEL from the list of projects and click Select.

---

**Note.** If the project already exists on the database, a confirmation dialog box appears asking if you want to overwrite the existing project. Select the File radio button and click OK to overwrite the existing project.

---

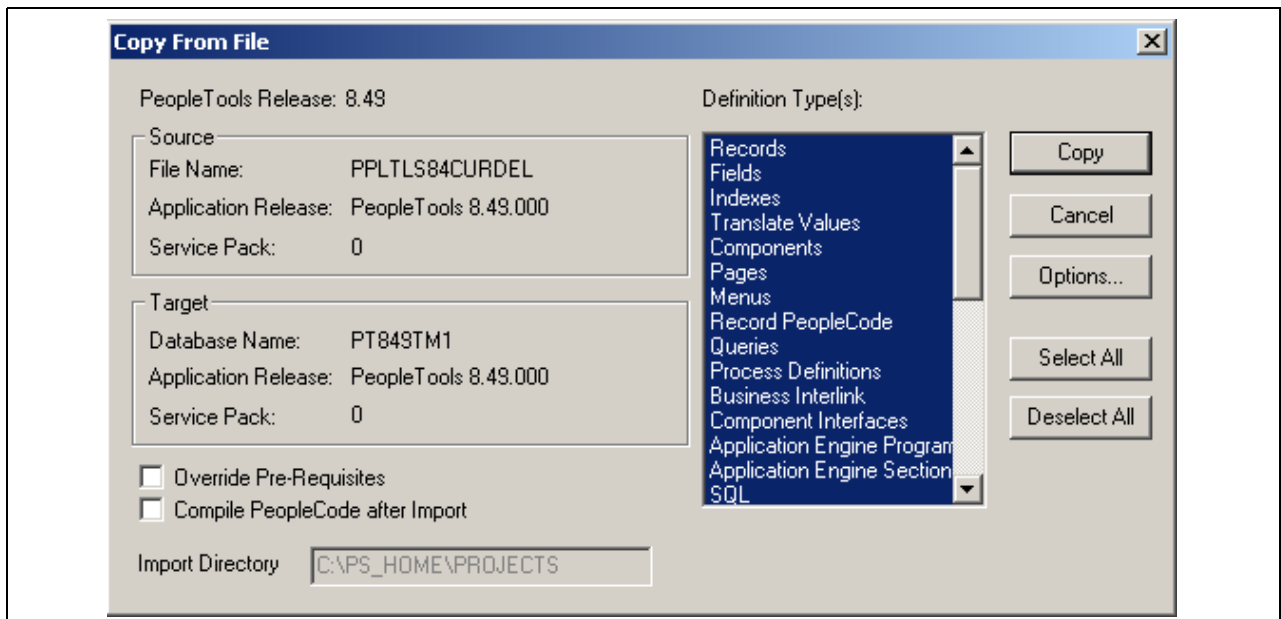




Selecting PPLTLS84CURDEL in the Copy From File dialog box

4. The Copy From File dialog box appears.

Select all object types and click the Copy button. When the progress dialog box disappears, the project has been copied.



The Copy From File dialog box showing that PPLTLS84CURDEL will be copied

**Note.** If you are applying a required for install PeopleTools patch *and if a database project is included*, apply the database projects now. Make sure to read the patch release notes to find out if database changes are in the patch.

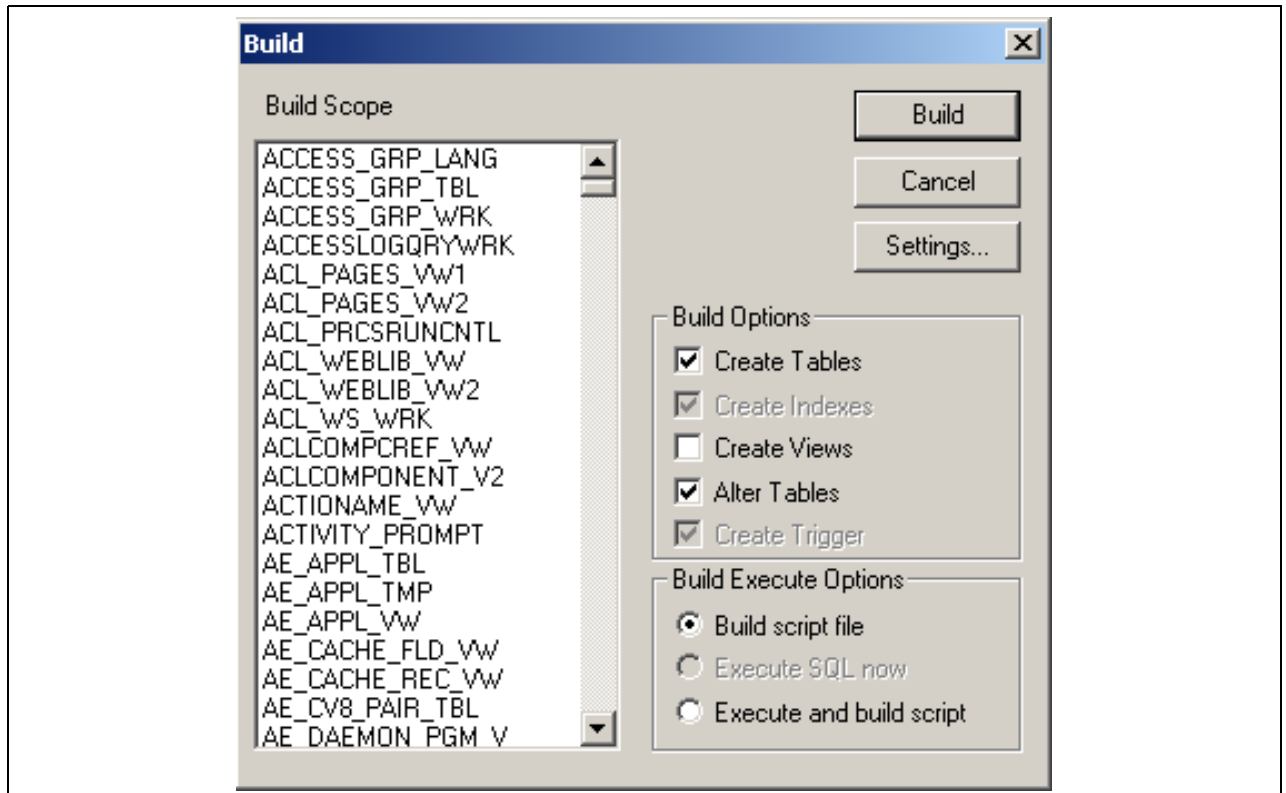
## Task B-8-6: Altering PeopleTools Tables

ALTER AUDIT is an online utility used to check whether the PeopleTools tables are synchronized with the underlying SQL data tables in your database. This process compares the data structures of your database tables with the PeopleTools tables to uncover inconsistencies. ALTER AUDIT then reports its findings. In this release, we expect to see differences between the database structure and the tools tables. You will generate and run a SQL script to synchronize the PeopleTools table definitions with the underlying tables in your database.

To alter PeopleTools tables:

1. Launch PeopleTools and sign on to the installed database.
2. From the Application Designer, select File, Open.
3. Select *Project*, enter *PPLTLS84CUR* in the name dialog box, and click OK.
4. Select Build, Project.

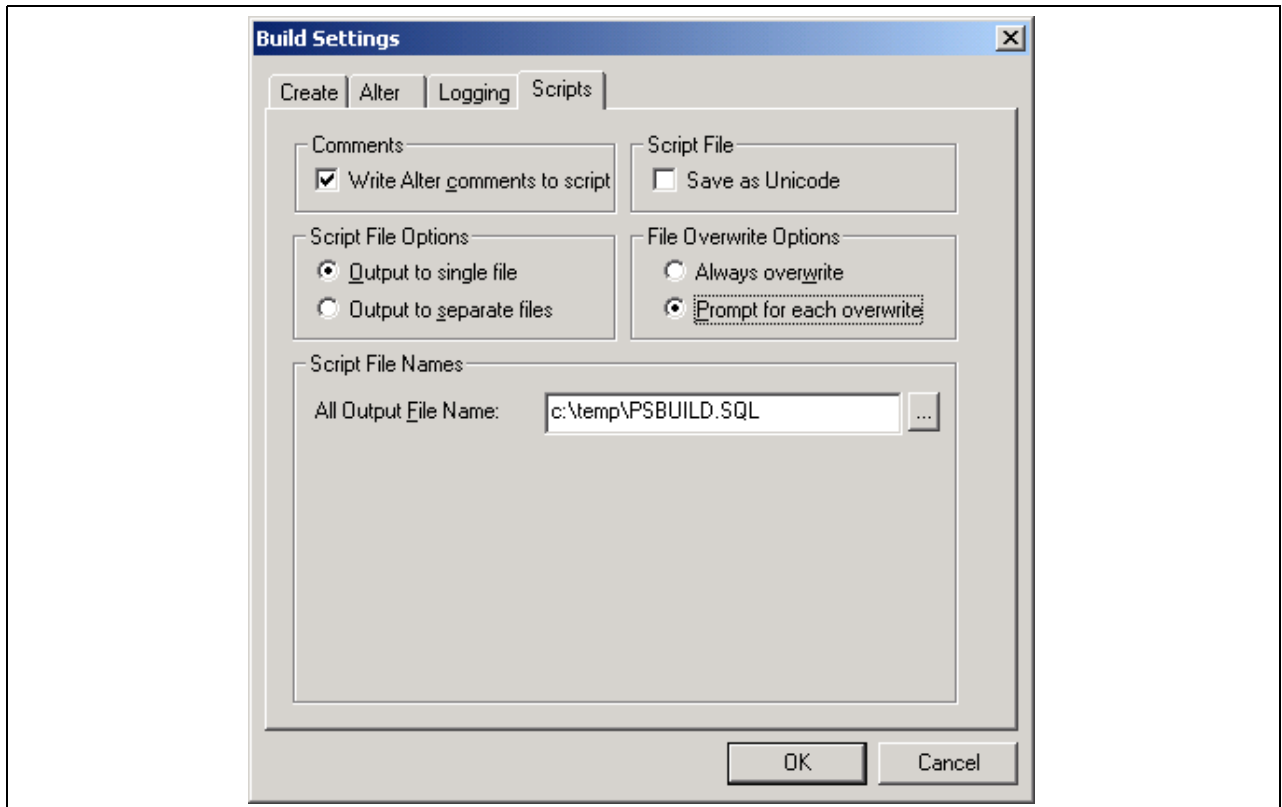
The Build dialog box appears:



The Build dialog box

5. Select Create Tables and Alter Tables in the Build Options region (Create Indexes and Create Trigger will automatically be selected).
6. Select Build script file in the Build Execute Options region.
7. Click Settings.

The Build Settings dialog box appears:

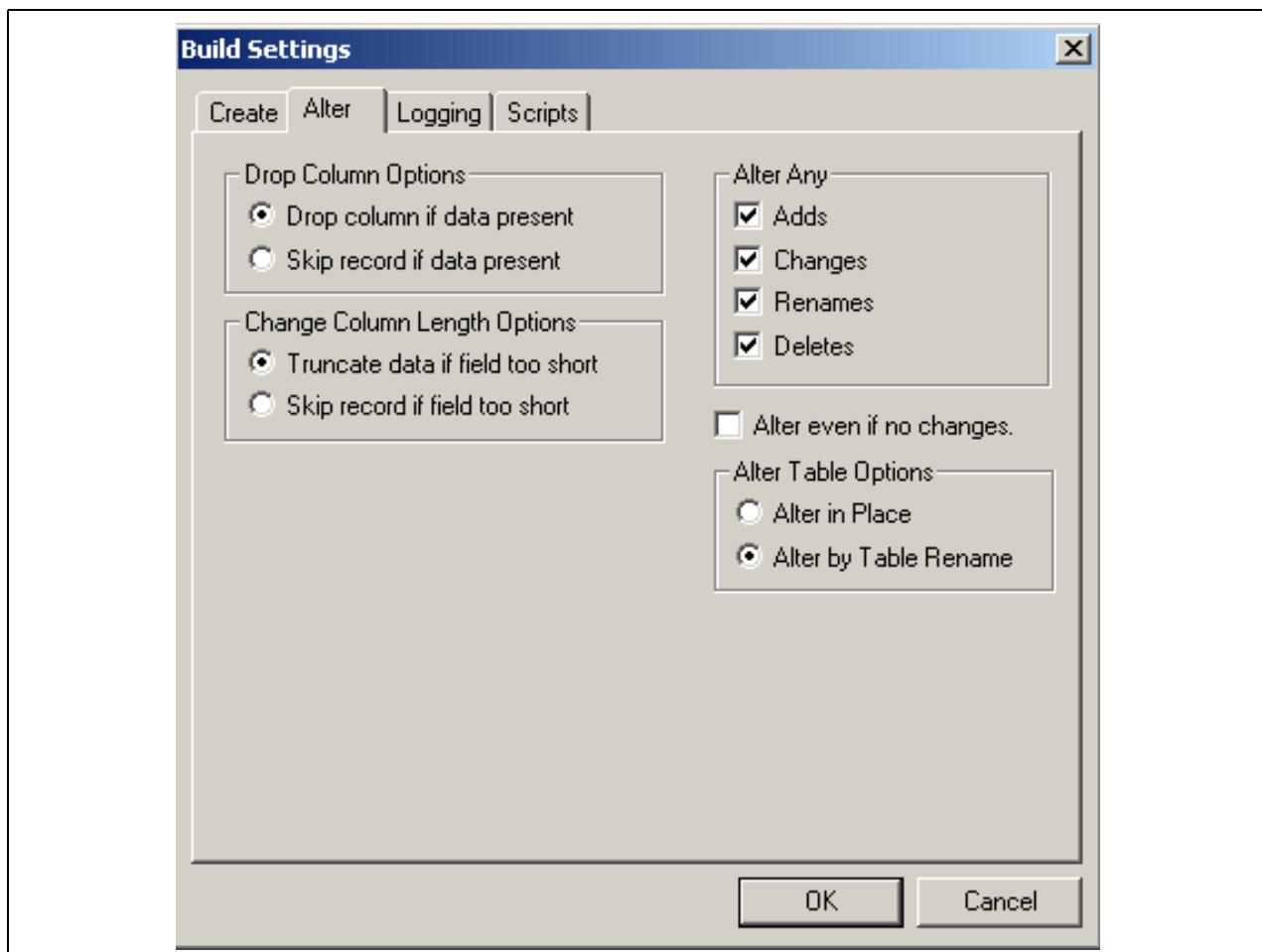


Build Settings dialog box: Scripts tab

8. Select the Scripts tab.
9. Select Write Alter comments to script.
10. Select the Alter tab and ensure that the Adds, Changes, Renames, and Deletes check boxes are selected in the Alter Any region.

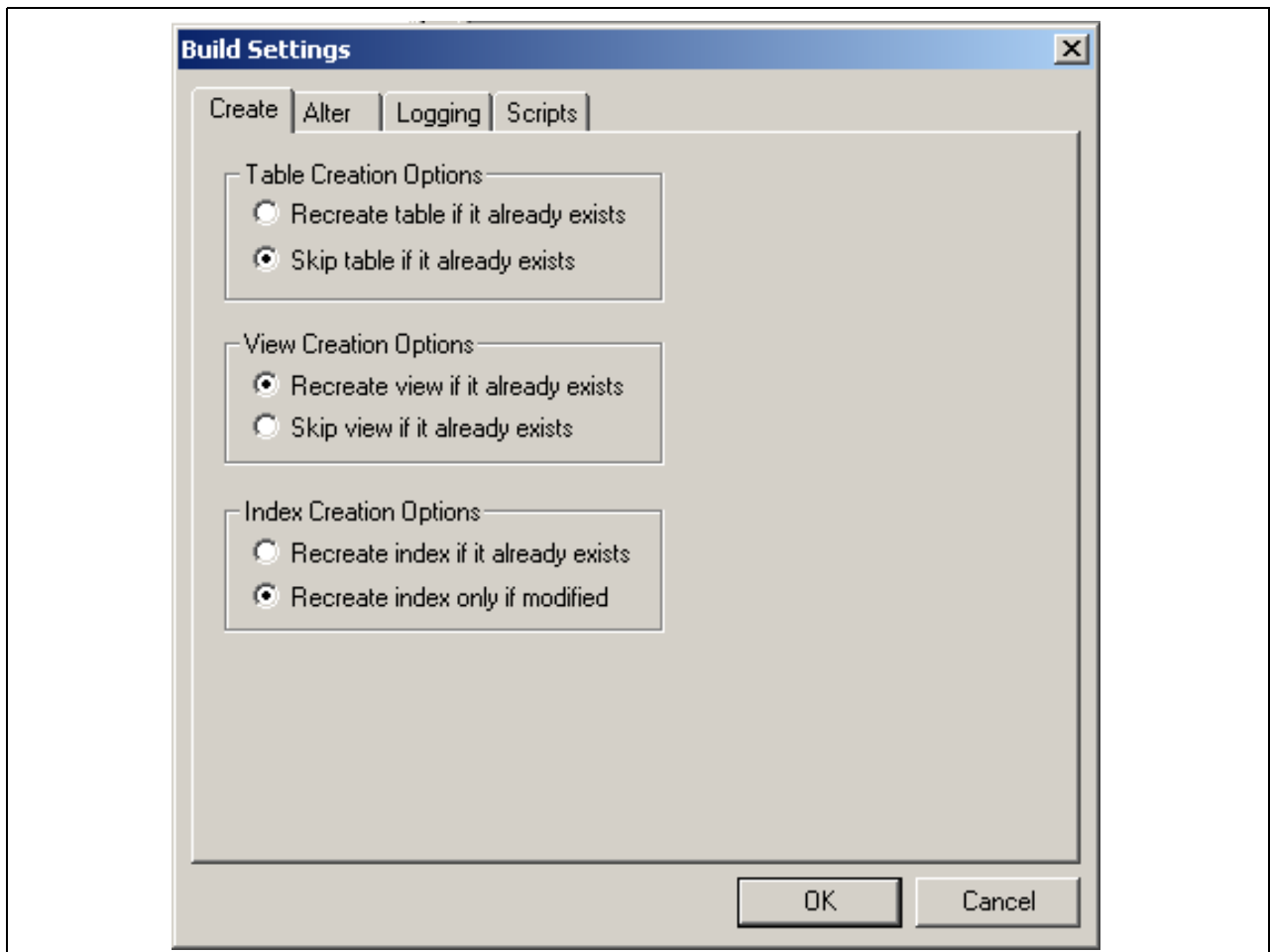
Drop column if data present should be selected in the Drop Column Options region, and Truncate data if field too short should be selected in the Change Column Length Options region.

Make sure that the option Alter by Table Rename is selected in the Alter Table Options region.



Build Settings dialog box: Alter tab

11. Select the Create tab and ensure that the Skip table if it already exists, Recreate view if it already exists, and Recreate index only if modified options are selected.



Build Settings dialog box: Create tab

12. Click OK.

The Build dialog box reappears.

13. Click Build.

14. Click Close when the process is completed.

15. Run the generated SQL script in your platform-specific query tool to bring your database structure in sync with the PeopleTools tables.

## Task B-8-7: Updating PeopleTools System Data

Data Mover scripts that update PeopleTools system data are run to enable new features and load new messages for the PeopleTools 8.49 release. Several of the scripts that you need to run are dependent upon the version of the application you are running.

See Understanding Database Updates.

To update PeopleTools system data:

1. Invoke Data Mover by running `<PS_HOME>\bin\client\winx86\psdmt.exe`.

The PeopleSoft Logon window appears.

2. Log on using the access ID you specified when you created your Data Mover scripts with the Database Setup program.

This will start Data Mover in bootstrap mode.

3. Run the appropriate Data Mover scripts for your application database version.

The application database version refers to the version before you started this step. Be sure to run the scripts in the order listed. The scripts are found in the <PS\_HOME>\scripts directory:

| Application Database Version | Scripts to Run                                                                              |
|------------------------------|---------------------------------------------------------------------------------------------|
| 8.40                         | pt841tls, pt842tls, pt843tls, pt844tls, pt845tls, pt846tls, pt847tls, pt848tls and pt849tls |
| 8.41                         | pt842tls, pt843tls, pt844tls, pt845tls, pt846tls, pt847tls, pt848tls and pt849tls           |
| 8.42                         | pt843tls, pt844tls, pt845tls, pt846tls, pt847tls, pt848tls and pt849tls                     |
| 8.43                         | pt844tls, pt845tls, pt846tls, pt847tls, pt848tls and pt849tls                               |
| 8.44                         | pt845tls, pt846tls, pt847tls, pt848tls and pt849tls                                         |
| 8.45                         | pt846tls, pt847tls, pt848tls and pt849tls                                                   |
| 8.46                         | pt847tls, pt848tls and pt849tls                                                             |
| 8.47                         | pt848tls and pt849tls                                                                       |
| 8.48                         | pt849tls                                                                                    |
| 8.49                         | None                                                                                        |

4. Run the pslanguages.dms Data Mover script in the <PS\_HOME>\scripts directory.

This script loads language-specific seed data.

5. Run the tlsupgnoncomp.dms Data Mover script in the <PS\_HOME>\scripts directory.

This will import the updated PeopleTools Trees, Roles, and Access Groups into your database.

6. If you are a Multilingual customer, from the Data Mover script that was created for your PeopleSoft database installation, find the UPDATE to PSLANGUAGES.

The statement should look similar to the following:

```
UPDATE PSLANGUAGES SET INSTALLED=1 WHERE LANGUAGE_CD = 'xxx';
```

where xxx is one of the PeopleSoft three-letter language code identifiers, as described earlier.

See “Preparing for Installation,” Planning Multilingual Strategy.

Run the SQL command identified above using your SQL tool.

7. Open Data Mover using a valid PeopleSoft Operator ID, such as PS for HRMS or VP1 for FDM.
8. If you are a Multilingual customer and have licensed non-English languages, run the pt849tlsxxx.dms scripts in the <PS\_HOME>\scripts directory.

This will update the language-specific PeopleTools system data in your database.

---

**Note.** The portion of the script name *xxx* is equivalent to the language code (that is, FRA, CFR, GER, JPN, and so on) of the non-English languages you have installed. There will be a Data Mover script for each non-English language.

---

9. Run the msgtleng.dms Data Mover Script in the <PS\_HOME>\scripts directory.  
Non-English message data was loaded in the pt849tlsx.dms scripts. This will update the messages in your database.
10. Run the ptstreng.dms Data Mover script in the <PS\_HOME>\scripts directory.  
Non-English system data was loaded in the pt849tlsx.dms scripts. This will update the SQR strings in your database.
11. Run the storept.dms Data Mover script in the <PS\_HOME>\src\cbl\base directory.  
This will update your PeopleTools COBOL stored statements.
12. Run the ptdefnsec.dms Data Mover script in the <PS\_HOME>\scripts directory.  
This will update the PeopleTools Definition Security group.
13. Run the createvw.dms Data Mover script in the <PS\_HOME>\scripts directory.  
This will recreate all the views in your database.

## Task B-8-8: Running PeopleTools Conversions

This section discusses:

- Convert Portal Objects
- Convert Query Headings
- Convert Setup Manager
- Convert Navigation Collection and Pagelet Wizard Data
- Convert Additional Pagelet Wizard Data

### Convert Portal Objects

The Application Engine program UPG844PORTAL splits PSPRSMDEFN.PORTAL\_URLTEXT into segments. This is performed for PeopleSoft Components URLs to extract Menu, Component, and Market information. Record, Field, Event, and Function Names are extracted from Iscript URLs. This program must be run by a PeopleSoft user with the Portal Administrator or PeopleSoft Administrator role. The following SQL will identify which users have the PeopleSoft Administrator or Portal Administrator roles:

```
select ROLEUSER, ROLENAME from PSROLEUSER where ROLENAME in ('PeopleSoft⇒
Administrator','Portal Administrator')
```

Run the UPG844PORTAL Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <oprid> -CP <pswd> -⇒
⇒
⇒
⇒
```



```
⇒
⇒
R INSTALL -AI UPG844PORTAL
```

Use the values for the database name and user ID that you entered on the startup tab of the Configuration Manager for <dbname> and <oprid>, respectively. However, be aware that <pswd> is not the same as the connect password that you entered on the Configuration Manager startup tab. Enter a value for <pswd> that is the password you want to be associated with the <oprid>.

See “Setting Up the Install Workstation.”

See Running the Database Configuration Wizard.

You may see some of the following errors when running this Application Engine program:

- **Not authorized CRef: <Portal Object Name> (95,5032).**

This means that you do not have proper privileges to run this conversion. The user ID that you are using to run this conversion needs to have Portal Administrator permissions.

- **Security synchronization failed for Portal Object: <Portal Object Name> (96,61).**

This is not a fatal error. It may be caused by a content reference that contains invalid URL text and indicates that there was an internal error writing to the security table. The invalid URL text may be pointing to a component or script that does not exist in the database. If you receive this error, please check PeopleSoft Customer Connection for Required at Install patches for your application and apply the patches after installing your database.

- **Cref <Portal Object Name> points to Menu: <Menu Name>, Component <Component Name> which doesn't exist. (96,80).**

The content reference is pointing to an invalid Menu/Component combination. If you receive this error, please check PeopleSoft Customer Connection for Required at Install patches for your application and apply the patches after installing your database.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*.

## Convert Query Headings

Crystal 9 when run through Process Scheduler will not handle queries with two or more prompts that have the same heading. These duplicates are also not legal in Query. Any old queries that have this condition need to be altered to work with Crystal. This Application Engine program searches for duplicate prompt headings in the table PSQRYBIND and appends numbers onto the text. For example "Item ID" would become "Item ID 2".

Run the UPGQRYDUPHED Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <oprid> -CP <pswd> -⇒
⇒
⇒
⇒
⇒
⇒
R INSTALL -AI UPGQRYDUPHED
```

---

**Note.** If a duplicate heading is found that will exceed the length of the field HEADING, the heading will need to be manually changed. The following error will be written to the log file in these cases :

The prompt heading <HEADING> for Query <QUERY> is duplicated.  
Please manually correct. (108, 1108)

---

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Query*.

## Convert Setup Manager

The application engine program UPGTSMDAT upgrades Setup Manager Version 1 (shipped with Fin SCM 8.8, CRM 8.9, and with HCM 8.9) to Setup Manager Version 2 (shipped with PeopleTools 8.46 and above). The program moves all data from Setup Manager Version 1 tables to Version 2 tables.

The application engine program was designed so that it can be run in any database, and can be rerun in the same database. In either case, it will determine if there is data to convert and run as appropriate. For detailed information, see comments attached to the Steps and Actions in this Application Engine Program within Application Designer. This program must be run by a PeopleSoft User with PeopleSoft Administrator role.

Run the UPGTSMDAT Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <oprid> -CP <pswd> -=>
=>
=>
=>
=>
=>
=>
R INSTALL -AI UPGTSMDAT
```

## Convert Navigation Collection and Pagelet Wizard Data

The application engine program UPGT846PP adds Navigation Collection and Pagelet Wizard data from the Common Components and Enterprise Portal storage tables into PeopleTools tables.

The application engine program performs the following conversions:

1. Moves data from Common Components tables to PeopleTools tables.
2. Moves data from Enterprise Portal tables to PeopleTools tables.
3. Updates the registry definitions to enable displaying Navigation pages.
4. Adds, updates, and deletes the Navigation Collections folders and content references in the portal registry to the new structures.
5. Converts Pagelet Wizard definitions to the PeopleTools Pagelet Wizard version.
6. Renames Navigation Collection and Pagelet Wizard portal registry attributes to the PeopleTools attribute names.

This program must be run by a PeopleSoft user with the Portal Administrator or PeopleSoft Administrator role.

Run the UPGT846PP Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <oprid> -CP <pswd>=>
```

```
-R INSTALL -AI UPGPT846PP
```

You may see the following error when running this Application Engine program:

```
You are not authorized for the <objecttype>...
```

This means that you do not have proper privileges to run this conversion. The user ID that you are using to run this conversion needs to have Portal Administrator permissions.

You can ignore any other errors encountered on PeopleSoft delivered objects at this time. Check PeopleSoft Customer Connection for Required at Install patches for your application and apply the patches after installing your database. You can safely rerun UPGPT846PP to check for any remaining errors after applying patches.

## Convert Additional Pagelet Wizard Data

The application engine program UPGPT848PP adds the following Pagelet Wizard data sources from Enterprise Portal to PeopleTools: IB Connector, Integration Broker, SOAP, and URL. In addition, the application program transforms the WSRP Portlets created in PeopleTools 8.46 or 8.47 versions of Pagelet Wizard. The process includes the following:

- Move data from Enterprise Portal tables to PeopleTools tables.
- Convert WSRP Portlets created by Pagelet Wizard to the new version.

This program must be run by a PeopleSoft user with the Portal Administrator or PeopleSoft Administrator role.

Run the UPGPT848PP Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <oprid> -CP <pswd> -=>
=>
=>
=>
=>
=>
R INSTALL -AI UPGPT848PP
```

You may see the following error when running this Application Engine program:

```
You are not authorized for the <objecttype>...
```

This means that you do not have proper privileges to run this conversion. The user ID that you are using to run this conversion needs to have Portal Administrator permissions.

You can ignore any other errors encountered on PeopleSoft delivered objects at this time. Check PeopleSoft Customer Connection for Required at Install patches for your application and apply the patches after installing your database. You can safely rerun UPGPT848PP to check for any remaining errors after applying patches.

## Task B-8-9: Converting Integration Broker

This section discusses:

- Updating Integration Broker Defaults
- Creating Integration Broker Objects
- Saving Application Messaging Objects
- Exporting Node Transactions

- Deleting Application Messaging Objects
- Deleting Node Transactions

If your database is delivered with PeopleTools 8.48 or higher, do *not* run this task since the database is already delivered with the new Integration Broker objects as of PeopleTools 8.48. Instead, proceed to Changing the User Interface.

## Updating Integration Broker Defaults

User-level node security and transactional security have been added as of PeopleTools 8.48. Service namespace information, a low-level user on the node, and a low-level permission list for service operations, need to be specified. Edit <PS\_HOME>\scripts\ptibupgrade.dms and make the necessary modifications as documented in the script. Consult with your Integration Broker specialist for assistance.

Open Data Mover using a valid PeopleSoft Operator ID and run this script.

## Creating Integration Broker Objects

The application engine program UPGPT848IBUG converts Application Package metadata into Integration Broker metadata. It also creates the projects PTUPGIBCLONE and PTUPGIBDELETE, and the script ptupg\_trx.dms.

---

**Note.** Conversion errors in the Application Engine log file will be resolved by applying application-specific Required for Install patches.

---

Run the UPGPT848IBUG Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <oprid> -CP <pswd> -=>
=>
=>
=>
=>
=>
=>
R INSTALL -AI UPGPT848IBUG
```

## Saving Application Messaging Objects

The PTUPGIBCLONE project was created by the UPGPT848IBUG Application Engine program and contains objects that were successfully converted. Copy this project to a directory of your choice where it will not be overwritten. The objects are copied to file as a precautionary measure since you will delete them from the database in a subsequent step.

To save Application Messaging Objects:

1. Launch Application Designer and sign on to your database with a valid PeopleSoft user ID.
2. From the Application Designer, select File, Open.
3. Select Project, enter *PTUPGIBCLONE* in the name dialog box, and click OK.
4. Select Tools, Copy Project, To File.
5. In the resulting dialog box, change the export directory to one of your choice, and click Copy.

When the progress dialog box disappears, the project has been copied to the specified location.

## Exporting Node Transactions

Open Data Mover using a valid PeopleSoft Operator ID and run the script <PS\_HOME>\scripts\ptupg\_trx\_export.dms to save the old pre-conversion node transaction data.

## Deleting Application Messaging Objects

Delete the obsolete pre-conversion object definitions from the database by first copying the PTUPGIBDELETE project to file, and then copying the same project from file. This project was created by the UPGPT848IBUG Application Engine program and contains the same objects as PTUPGIBCLONE.

To delete Application Messaging Objects:

1. Launch Application Designer and sign on to your database with a valid PeopleSoft user ID.
2. From the Application Designer, select File, Open.
3. Select Project, enter *PTUPGIBDELETE* in the name dialog box, and click OK.
4. Select Tools, Copy Project, To File.
5. In the resulting dialog box, change the export directory to the same one you used for PTUPGIBCLONE, and click Copy.

When the progress dialog box disappears, the project has been copied to the specified location.

6. Select Tools, Copy Project, From File.
7. In the resulting dialog box, change the import directory to the previously specified directory, select PTUPGIBDELETE from the list of projects, and click Select.

---

**Note.** Because the project already exists on the database, a confirmation dialog box appears asking if you want to overwrite the existing project. Select the File radio button and click OK to overwrite the existing project.

---

8. Select all object types and click the Copy button.

When the progress dialog box disappears, the project has been copied. The actions in the project are set to Delete, so this will delete the obsolete pre-conversion object definitions from the database.

## Deleting Node Transactions

The script ptupg\_trx.dms is generated by the UPGPT848IBUG Application Engine program. This script can be found in the location specified in the OUTPUT variable set in Configuration Manager.

To view the OUTPUT variable:

1. Open Configuration Manager.
2. Select the Profile tab.
3. Click Edit to open the Default profile.
4. Select the Process Scheduler tab.
5. Examine the Output Directory value.

Open Data Mover using a valid PeopleSoft Operator ID and run this script to remove obsolete node transaction data associated with the obsolete objects in the PTUPGIBDELETE project.

## Task B-8-10: Changing the User Interface

PeopleTools has updated the styles that define the user interface. This PeopleTools release delivers the classic (old) style as well as two new styles: a dark blue style and a light blue style. PeopleTools System Databases and PeopleSoft 8.4 applications use the classic style, but all other applications use the new dark blue style. The classic style is set as the default. To use one of the new user interfaces, you have to delete the substyle sheets associated with the classic style and replace them with either the light or dark blue substyle sheet.

---

**Note.** The new user interface is supported by Internet Explorer release 5 and above and Netscape Navigator release 6 and above. If you are using a browser and release other than these, the system defaults to the classic style.

---

To enable a new user interface:

1. In Application Designer, select File, Open.
2. On the Open Definition dialog box, select *Style Sheet* from the Definition drop-down list.
3. Enter the name *PSSTYLEDEF* in the Selection Criteria Name field, and select Open.
4. Highlight *PSSTYLEDEF* in the list, and select Open.
5. Click the *PSALTERNATE* Sub Style Sheet and press DELETE.
6. Select Insert, Insert Sub Style Sheet.
7. Select *PSALTERNATE\_LIGHTBLUE* or *PSALTERNATE\_DARKBLUE*.
8. Repeat steps 5 through 7 for the *PTSTYLEDEF* Sub Style Sheet, making sure to use the same extension (*\_LIGHTBLUE* or *\_DARKBLUE*) you used for *PSALTERNATE*.
9. Select File, Save.
10. Open the style sheet *PSQUERYSTYLEDEF* as in steps 1 through 4.
11. Click the *PTQUERYSTYLESUB* Sub Style Sheet and press DELETE.
12. Select Insert, Insert Sub Style Sheet.
13. Select *PTQUERYSTYLESUB\_LIGHTBLUE* or *PTQUERYSTYLESUB\_DARKBLUE*.  
Use the same extension that you used in step 8.
14. Select File, Save.

---

## Task B-9: Running Additional Data Mover Scripts

To import additional data for your specific PeopleSoft database, or to make other required changes, you may need to run additional Data Mover scripts. These script files have the extension *.dms* and are sometimes referred to as “DMS scripts.” They are located in the *<PS\_HOME>\scripts* directory of your file server, and need to be run from the file server by means of Data Mover.

For the details on which additional application-specific Data Mover scripts to run, consult your application-specific installation instructions.

If you have installed a language other than English, you may need additional instructions on language-specific Data Mover scripts.

See Installing a Multilingual PeopleTools System Database.

---

## Task B-10: Installing a Multilingual PeopleTools System Database

This section discusses:

- Understanding the Multilingual Database Project
- Applying the Multilingual Database Project
- Populating the Translated System Data

### Understanding the Multilingual Database Project

The information in this section applies if you are installing a multilingual PeopleTools System database. If not, skip this task and go on to the task “Running VERSION Application Engine Program.” If you are installing an application database (for example, HRMS, FSCM, EPM, and so on), you do not need to run this task.

If you are adding a new (PeopleSoft-delivered) language to the PTSYS database, you must execute this step for that language. For example, if you want to add Polish to your current multilingual database, you should install Polish from PPLTLSML so you will get all objects. If you only "upgrade" your database to have Polish using PPLTLS84CURML, you will only get the objects that changed between 8.40 and the current release.

If you are installing a PeopleTools System database and you want it to be multilingual, you need to perform the steps in the following section after the database has been loaded with Data Mover.

See Applying the Multilingual Database Project.

---

**Note.** When you log onto the multilingual database, be sure to select the base language of the database.

---

### Task B-10-1: Applying the Multilingual Database Project

This procedure describes how to apply the multilingual database project that contains translations of the PeopleTools objects.

To apply the multilingual database project:

1. Launch Application Designer.
2. Select Tools, Copy Project, From File.
3. In the resulting dialog box, change the import directory to <PS\_HOME>\projects.
4. Select *PPLTLSML* from the list of projects and click the Open button.
5. In the Upgrade Copy dialog box, make sure that all object types are selected.
6. Click the Options button, select the Copy Options tab, and ensure that only the non-English languages you have installed are selected.

Please note that English and Common should *not be selected*.

7. Select the languages that you are currently installing from the Copy Options dialog box.
8. Click the Copy button.

(The Reset Done Flags check box will be selected; accept this default.)

## Task B-10-2: Populating the Translated System Data

To populate the translated system data:

---

**Note.** You need to run the following script in User mode.

---

1. Launch Data Mover.
2. Open the pt849tlsx.dms script using File, Open.
3. Select File, Run

---

**Note.** The portion of the script name xxx is equivalent to the language code (that is, FRA, CFR, GER, JPN, and so on) of the languages you have installed. There will be a Data Mover script for each language.

---

---

## Task B-11: Running VERSION Application Engine Program

Run the VERSION Application Engine program on your database. From the DOS command line, the syntax is:

```
<PS_HOME>\bin\client\winx86\psae -CD <dbname> -CT MICROSOFT -CO <userid> -CP=>
<userpswd> -R INSTALL -AI VERSION
```

Use the values for the database name and user ID that you entered on the startup tab of the Configuration Manager for <dbname> and <userid> respectively. However, be aware that <userpswd> is not the same as the connect password you entered on the Configuration Manager startup tab. Enter a value for <userpswd> that is the password you want to be associated with the <userid>.

See “Setting Up the Install Workstation.”

See Running the Database Configuration Wizard.

---

## Task B-12: Changing the Base Language

Chapter 1 will help you determine whether you should change your base language, and lists the currently supported languages.

See “Preparing for Installation,” Planning Multilingual Strategy.

This task applies only if your users will be operating PeopleSoft applications *primarily* in one particular language other than English. It gives a performance boost to the language you designate as the base language, but requires more administrative overhead than leaving English as the base language. The details are spelled out in the following PeopleBook:

See *Enterprise PeopleTools 8.49 PeopleBook: Global Technology*.

---

## Task B-13: Running SQR Reports

This section discusses:



- Running SQRs on the Client Workstation
- Creating a Shortcut to Run SQRs

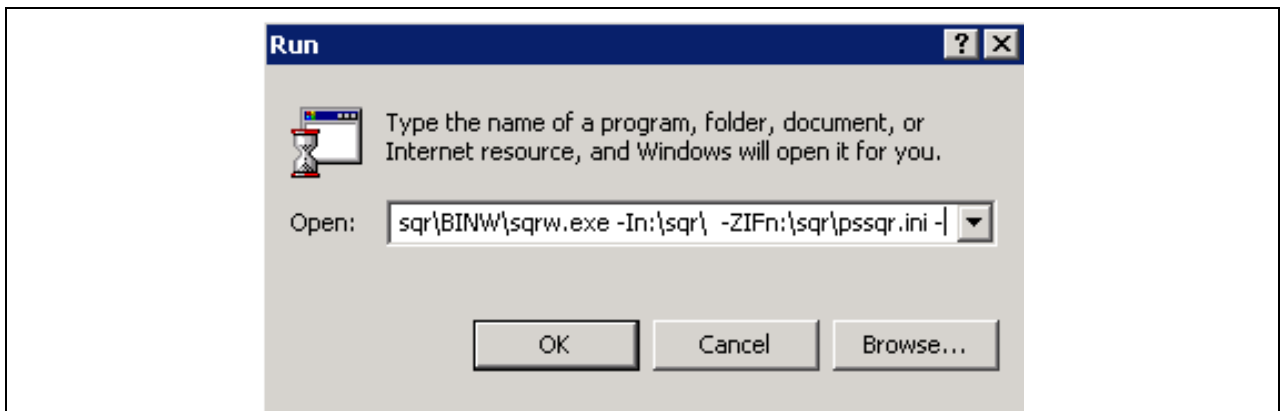
**Note.** The following instructions describe how to run SQR reports from the client workstation. On the Windows client, you may prefer to create a shortcut to allow you to run the reports repeatedly. You can use these instructions to run SQRs required in the upcoming task “Checking the Database.” You can also choose to run SQR reports from the command line in console mode.

## Task B-13-1: Running SQRs on the Client Workstation

To run an SQR on the client workstation:

1. Select Start, Run, click Browse, and navigate to <PS\_HOME>\bin\sqr\MSS\binw.  
Select sqrw.exe and click Open.
2. Add any needed flags at the end of the command line.

Refer to the table that follows. For those flags that require attributes, append the attributes to the flags with no intervening spaces (for example, `-fd:\psbase\psenv\cr881dmo\`).



Running an SQR report on the client

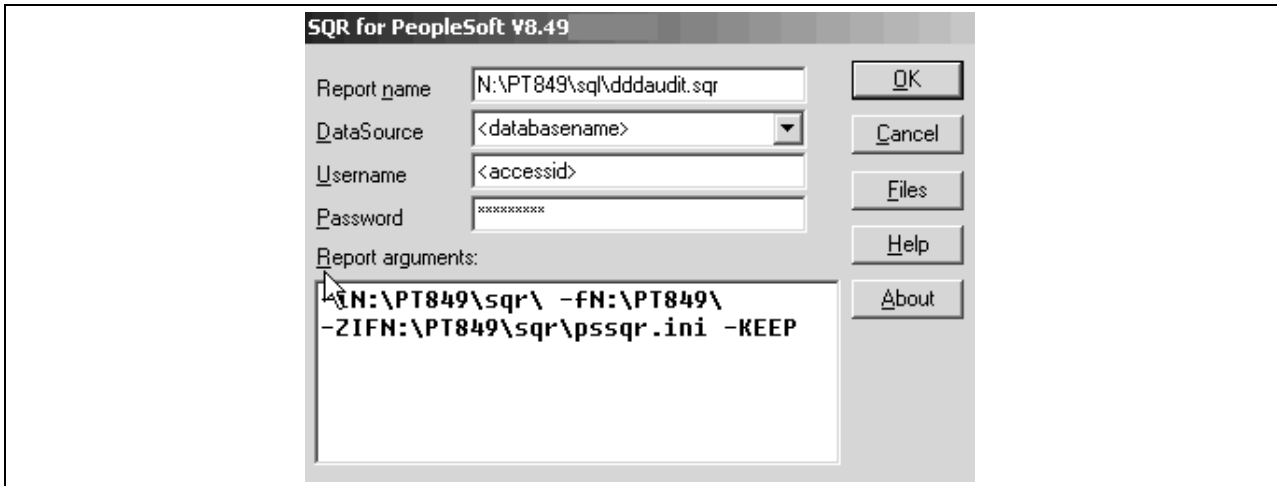
The following table summarizes the SQR report arguments used by PeopleSoft. (For a full listing of report arguments, press the Help button to view the SQR help topic for this dialog box.)

| Flag | Description                                                                                                                                                                                                                                                 |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -I   | Specifies the directories that SQR will search for the #INCLUDE files. (A trailing slash is required.)                                                                                                                                                      |
| -f   | Specifies the directory where the report output will be sent.<br>If you use the <code>-keep</code> flag, specify a directory with an ending slash.<br>If you use the <code>-printer</code> flag, specify a full pathname with a filename for the HTML file. |
| -ZIF | Sets the full path and name of the SQR initialization file. The <code>-ZIF</code> flag should point to your <PS_HOME>\sqr\pssqr.ini file.                                                                                                                   |

| Flag        | Description                                                                                           |
|-------------|-------------------------------------------------------------------------------------------------------|
| -keep       | Keeps the .SPF file after the program runs. This enables you to view the report with the SQR viewer.  |
| -printer:ht | Generates the output file in HTML format. Specify the filename, with path location, with the -f flag. |

- Click OK.

The resulting dialog box should look something like this:



SQR for PeopleSoft Dialog Box

- Enter the following values:
  - Enter the report name.  
You must specify the full path.
  - Enter the database name in the DataSource field.
  - Enter the access ID in the Username field.
  - Enter the access password in the Password field.
- Click OK to run the SQR report.

## Task B-13-2: Creating a Shortcut to Run SQRs

If you think you may need to run the SQR reports more than once, you may want to create a shortcut on the Windows client workstation. To save the report arguments:

- Open Windows Explorer on the machine on which you want to run SQR.
- Navigate to <PS\_HOME>\bin\sqr\MSS\binw.
- Right-click sqrw.exe and click Create Shortcut.
- Right-click the shortcut that you just created and select Properties.
- On the Shortcut tab, add the same sqrw flags that you used in the previous task after sqrw.exe in the Target entry box.
- Click OK.

7. To run the report, double-click the shortcut and specify the following information in the dialog box:
  - Report Name: Enter the full path and the name.
  - Data Source
  - Username: Enter the access ID.
  - Password: Enter the access password.
  - Report arguments: Make any necessary modifications to the saved arguments.
8. Click OK.

---

## Task B-14: Checking the Database

Run and examine two SQR reports to verify that your database is complete.

See *Preparing to Run SQR*.

To verify that the database is complete, run the following SQR reports from the <PS\_HOME>\sqr directory:

- dddaudit.sqr
- sysaudit.sqr.

For further information about the dddaudit and sysaudit reports, consult PeopleBooks. This documentation includes specific information on how to interpret the reports and how to fix any errors found there.

See *Enterprise PeopleTools 8.49 PeopleBook: Data Management*, “Ensuring Data Integrity.”

---

**Note.** If any records show up in the VIEWS-2 or TABLE-3 section of dddaudit and are contained within the PPLTLS84CURDEL project, you may safely drop these records using the SQL query tool for your platform.

---

### See Also

*Enterprise PeopleTools 8.49 PeopleBook: Data Management*

*Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*

---

## Task B-15: Cleaning and Backing Up the Database

This step involves running sp\_updatestats, running some DBCC commands, and dumping your transaction log and database.

To clean and back up your database:

1. To check the integrity of the database, also run the following DBCC command through the Query Analyzer or osql:

DBCC CheckDB

PeopleSoft recommends that you run this command before you do a dump of your database to confirm that everything is set up properly.

2. Backup the transaction log.

This step is not necessary if you previously enabled *Truncate Log On Checkpoint*. If you *did* enable *Truncate Log On Checkpoint*, you should turn it off at this point. You can use the *No\_Log* or *Truncate\_Only* option because you will not be saving your log at this time.

3. Back up the database.

Make sure you have a good backup schedule in place so you can recover your work in case of an emergency. This usually includes scheduling nightly backups of the transaction log and weekly backups of the database.

## See Also

*The SQL Server Books Online*

## APPENDIX C

# Installing Microsoft SQL Server 2005

This appendix discusses:

- Understanding Microsoft SQL Server 2005 Installation
- Installing SQL Server 2005 on the Database Server
- Starting and Stopping Microsoft SQL Server 2005
- Configuring the Connection to Use SNAC

---

## Understanding Microsoft SQL Server 2005 Installation

This appendix describes how to install Microsoft SQL Server 2005 for use with PeopleSoft. For complete step-by-step instructions on installing Microsoft SQL Server 2005, please refer to the SQL Server 2005 Books Online (support.Microsoft.com or Microsoft support services).

---

**Note.** If you are upgrading from an existing installation on Microsoft SQL Server 2000 please see the appendix “Upgrading to Microsoft SQL Server 2005.”

---

---

## Task C-1: Installing SQL Server 2005 on the Database Server

This task describes how to install Microsoft SQL Server 2005 on the database server. You may need to reboot your server after the installation.

---

**Note.** There are different editions of Microsoft SQL Server 2005. Make sure that the edition you install is appropriate for your requirements. Some editions are not compatible with certain operating systems. You can check the version and edition of your existing SQL Server installation by issuing ‘SELECT @@VERSION’ from Query Analyzer. Please look at the SQL Server Books Online and Microsoft support for more information about editions.

---

To install Microsoft SQL Server 2005 on the database server:

1. If you want to uninstall your previous Microsoft SQL Server software before installing Microsoft SQL Server 2005, you can use Control Panel, Add/Remove Programs.

---

**Note.** We recommend that you install only one SQL Server version per server. This should simplify the administration. However, in some instances you may need to install multiple versions, and it is possible to have side-by-side installations of Microsoft SQL Server 2000 and Microsoft SQL Server 2005.

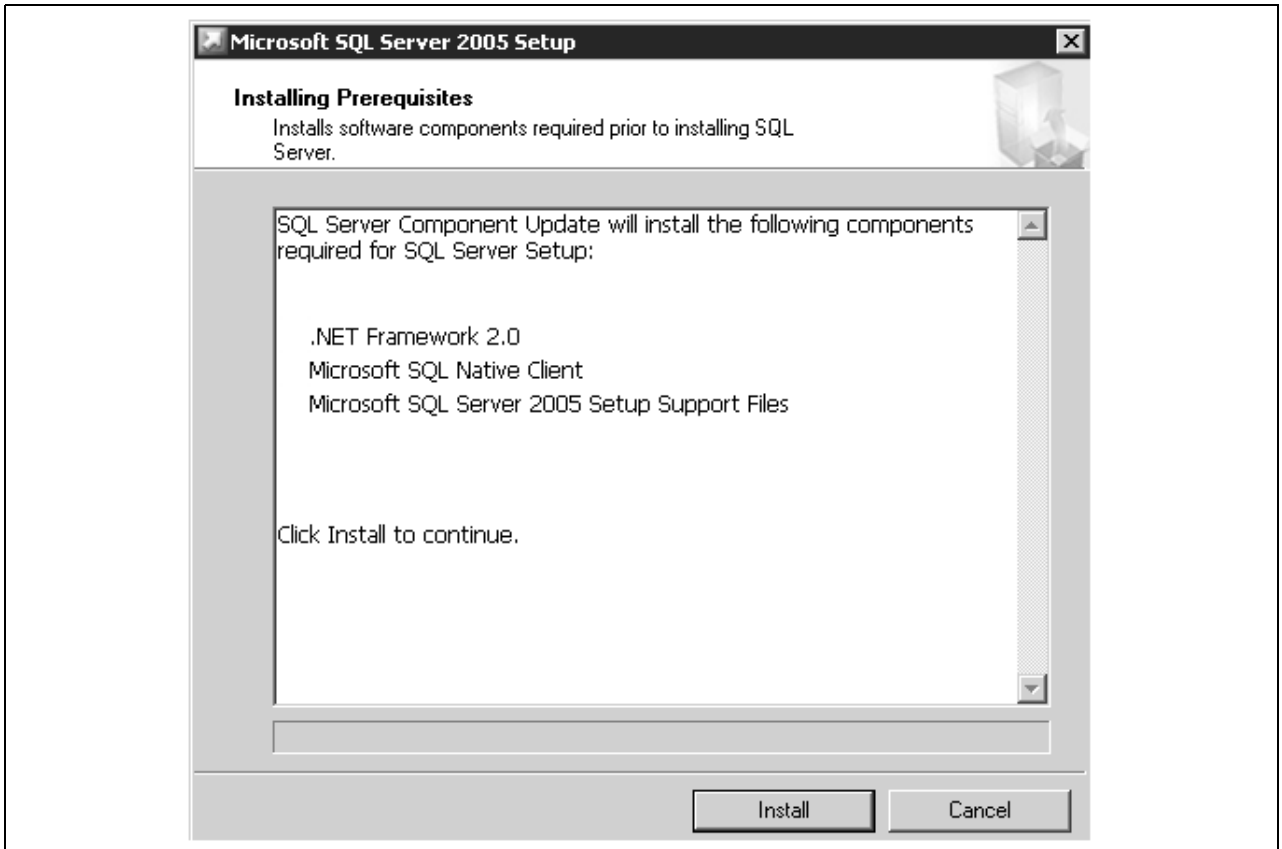
---

2. Insert the Microsoft SQL Server 2005 CD into the CD-ROM drive.

The installation should start automatically, but if it does not, run `setup.exe` from the cdrom directory.

The first part of the installation delivers the software components, which are a prerequisite to use SQL Server. The installer shows a list of components.

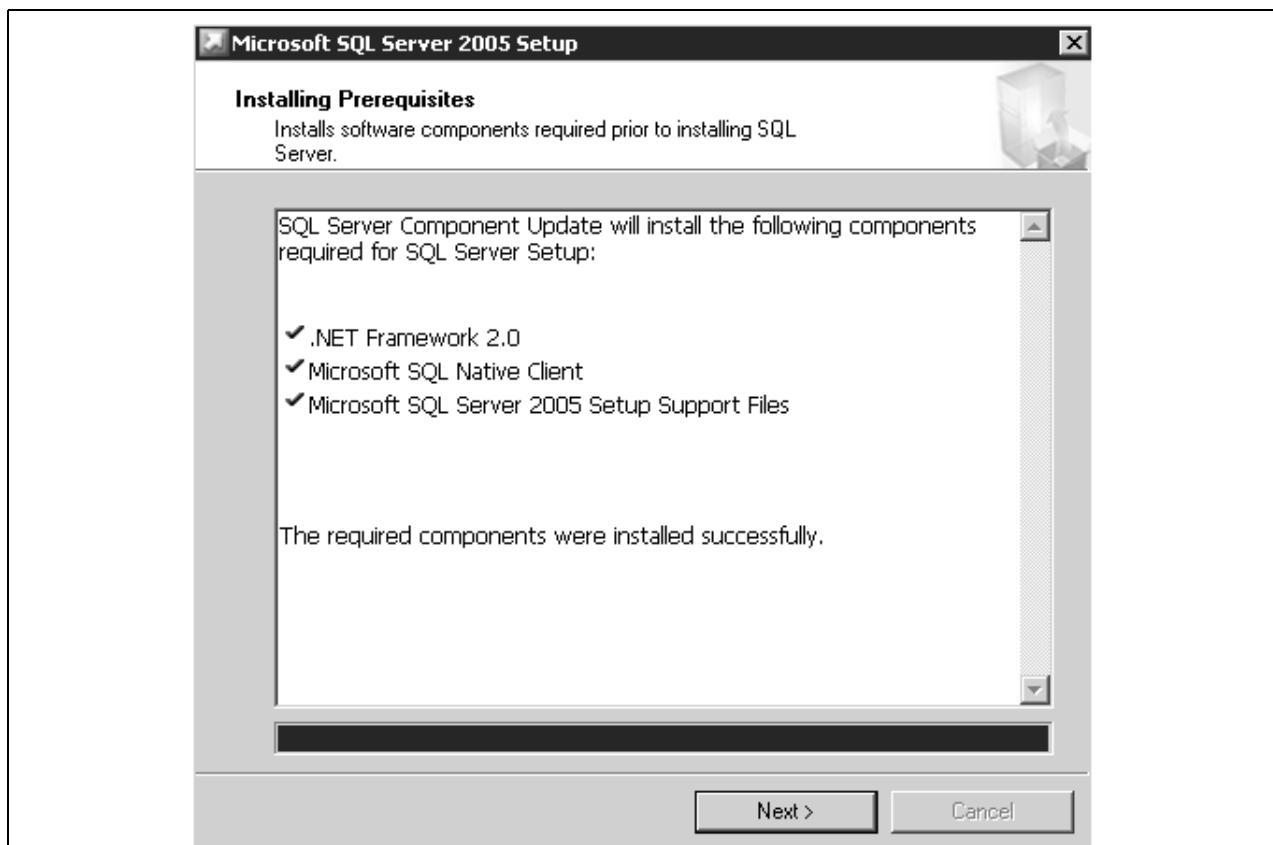
3. Click Install to proceed.



Microsoft SQL Server 2005 Setup window

After the listed components are installed, another window appears.

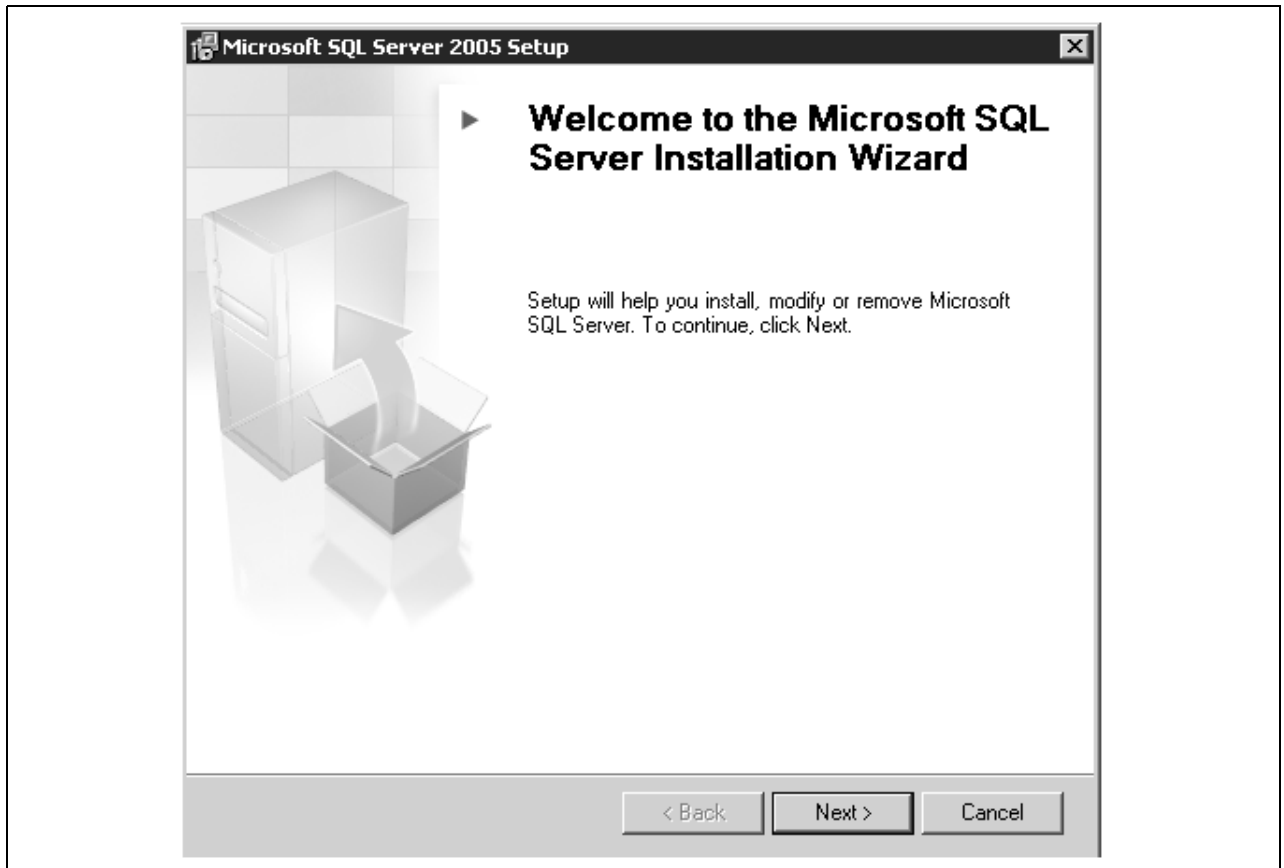
4. Click Next to continue.



Microsoft SQL Server 2005 Setup window - Successful installation

A Welcome window appears.

5. Click Next to continue.

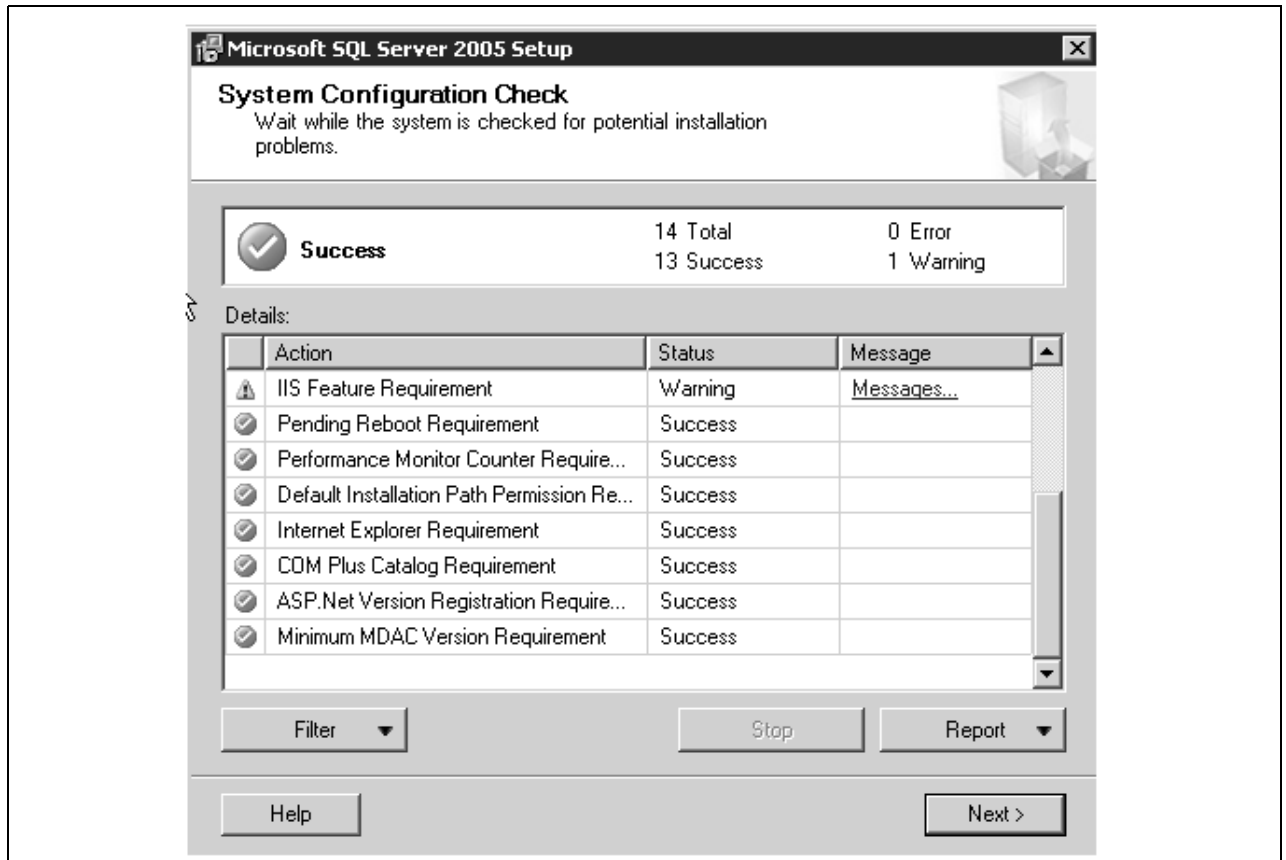


Microsoft SQL Server 2005 Setup - Welcome window

The installer runs a system configuration check. A window displaying the results appears.

6. Click Next.





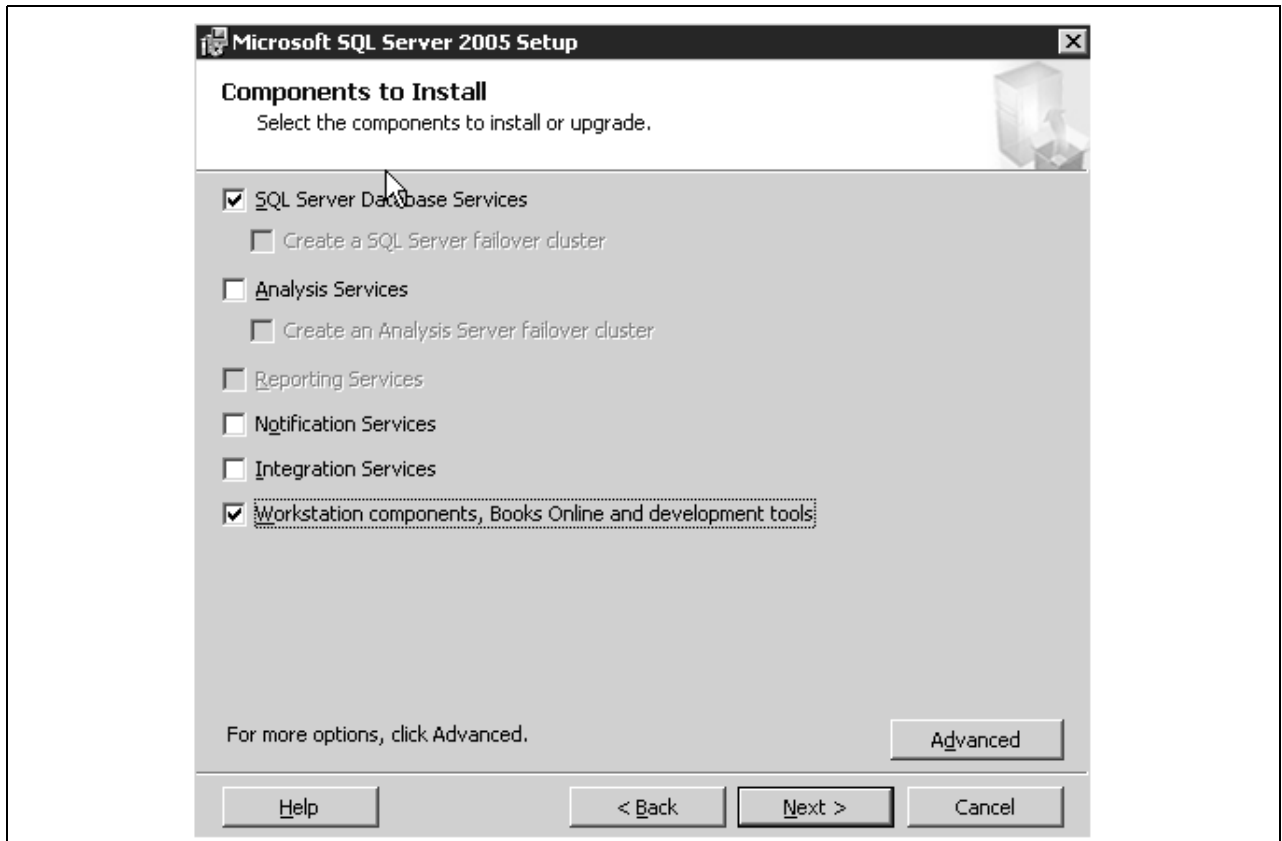
System Configuration Check window

Some components are not required to proceed with the installation, but will cause a warning if not present because their absence means that some of the SQL Server features may not be available. Please refer to Microsoft documentation for additional details.

Although for PeopleSoft applications IIS does not need to be installed in the database server, its absence may raise a warning as shown in the previous figure.

7. Click Next and enter the registration information.
8. Select the components and services you want to install.

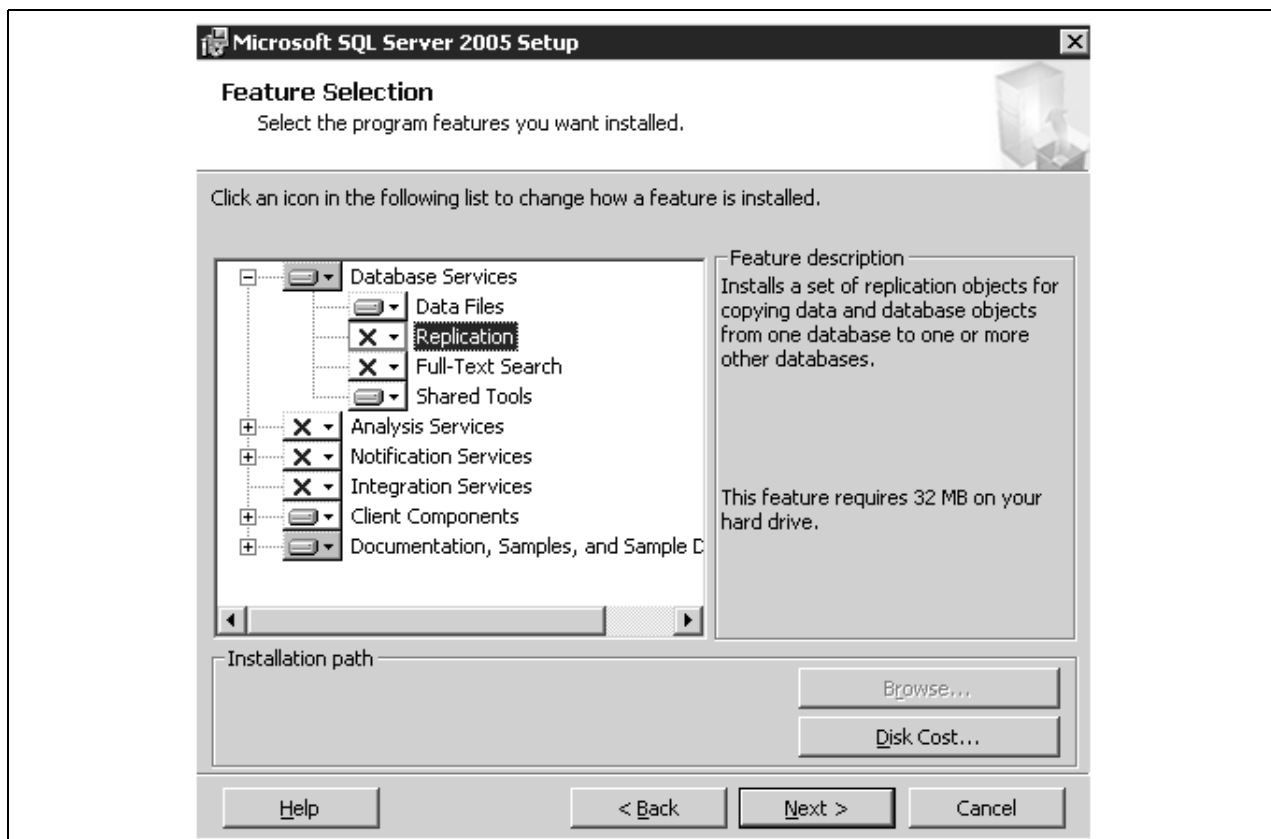
At a minimum you must install the SQL Server Database Services and the Workstation Components, Books Online and Development tools as shown:



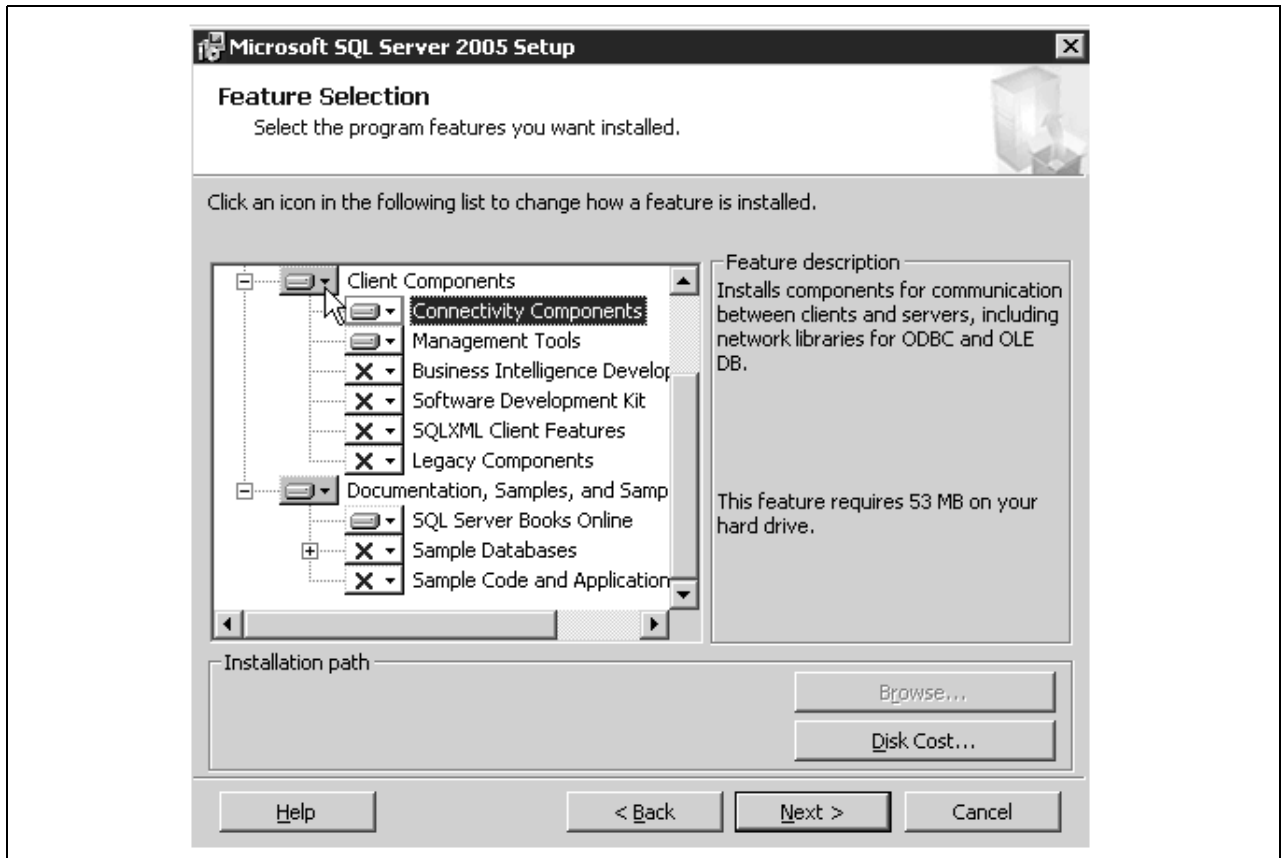
Components to Install window

9. Click Advanced to display more options.

The following figures show the minimum services that need to be installed for PeopleSoft applications:



Feature Selection window (1 of 2)



Feature Selection window (2 of 2)

10. Select the Default instance or Named instance radio button on the following window.

If you select Named instance, enter a name, for example *SQL2005*, in the text-entry box below the radio button.

Select Next.

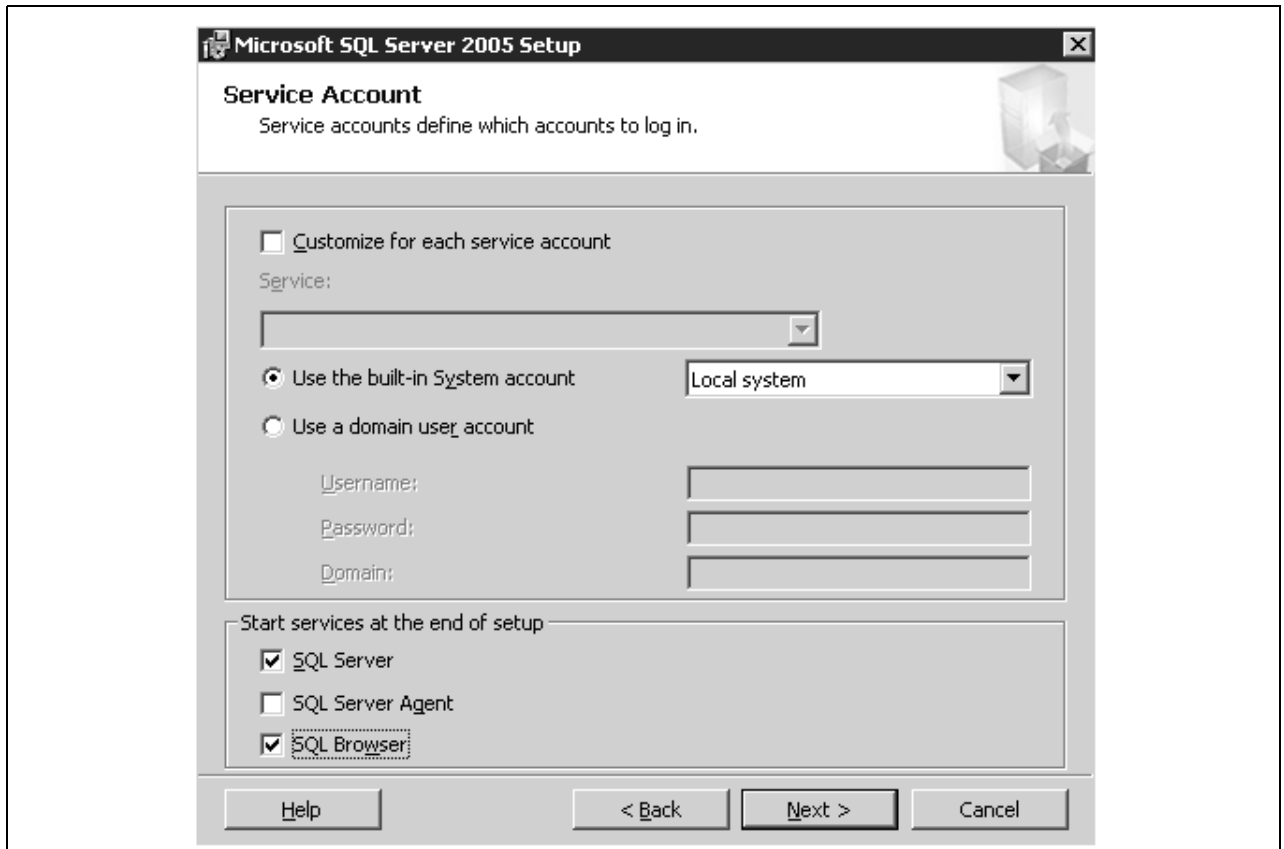


Instance Name window

11. Select the appropriate options to customize the Service Account.

Select the radio button Use the built-in System account, and select Local system from the drop-down list.

We recommend the use of a local system account to start and stop SQL Server.

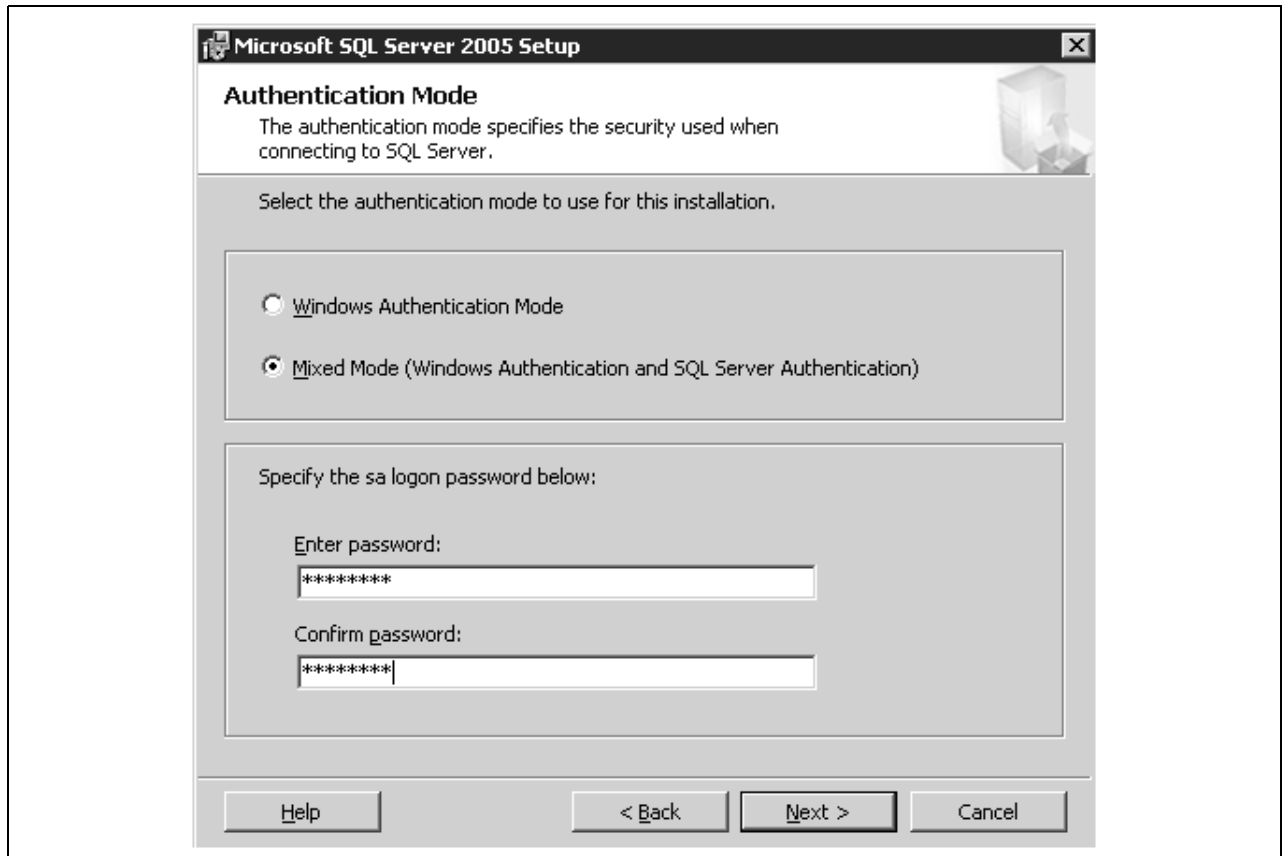


Service Account window

Select Next.

12. Select the Authentication Mode and click Next.

We recommend a “Mixed” authentication mode.



Authentication Mode

13. On the Collation settings window, select the Collation designator and sort order radio button.

Select Latin1\_General from the drop-down list, and select the Binary check box.

Your collation designation may vary if you are not using English.

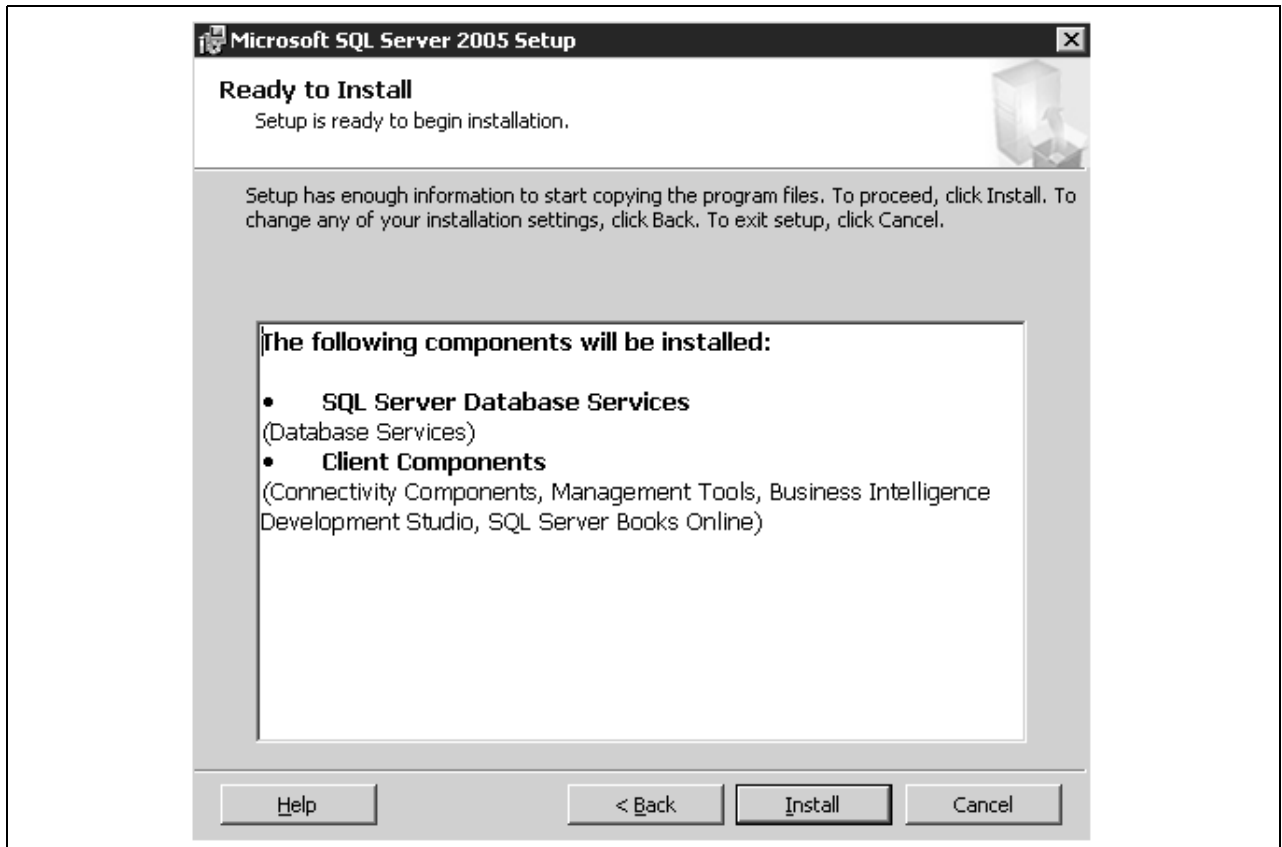
---

**Note.** Make sure the collation chosen for the server is the same that is to be used on the PeopleSoft databases. Using a different collation for your database(s) and the server, may require the use of casting to specify the collation of the result set; this is not supported by PeopleTools.

---

14. Select one of these check boxes on the Error and Usage Report Settings dialog box, and click Next to continue with the installation:
- Automatically send Error reports for SQL Server 2005 to Microsoft or your corporate error reporting server.
  - Automatically send Feature Usage data for SQL Server 2005 to Microsoft.
15. A window appears displaying the components to be installed.

Review the list and make sure they match the previously selected options. The following is an example; other components may appear for your particular installation:



Ready to Install window

16. Click Install to continue with the installation.

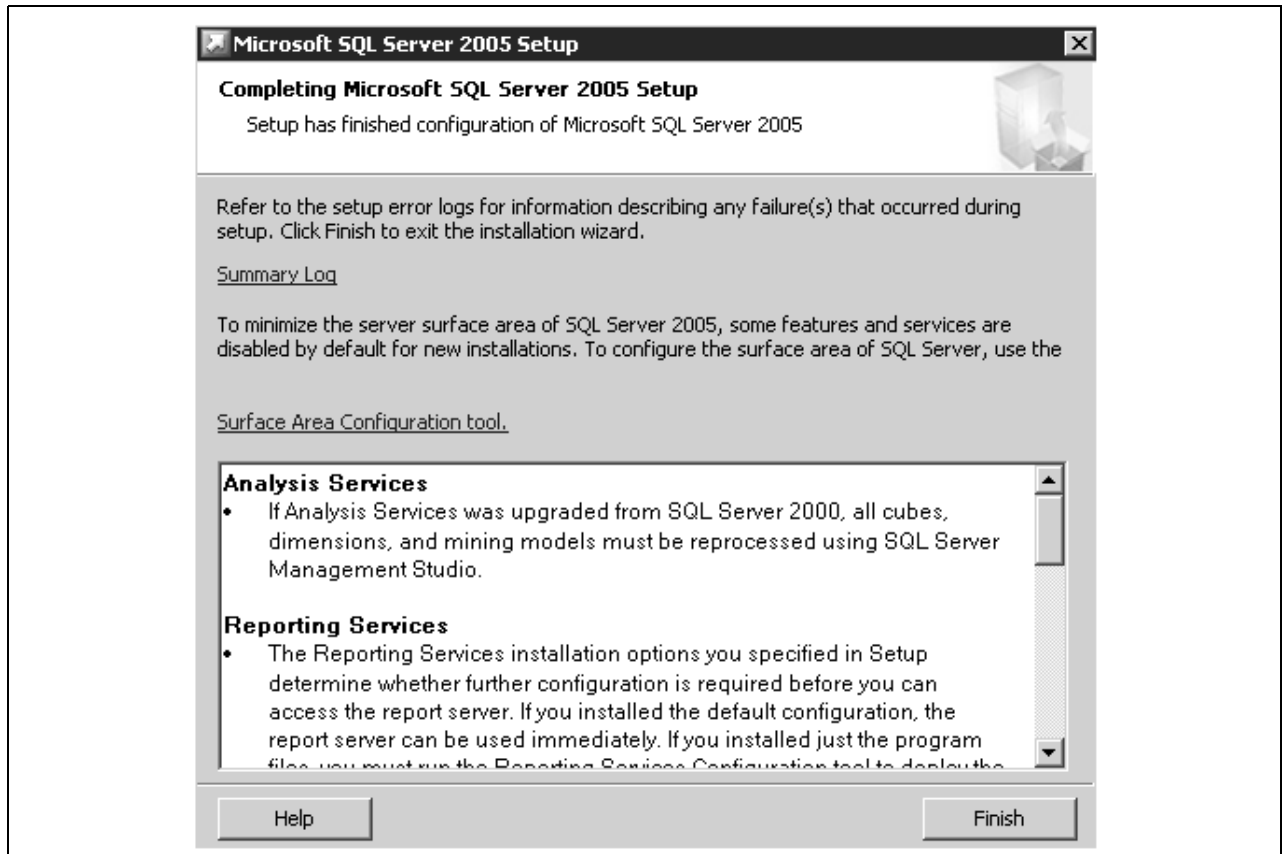
A progress indicator appears.

When the installation is complete, a window appears listing the installed components and displaying the status Setup Finished. Click Next.

17. After the server is installed the following window appears (do not click Next yet).

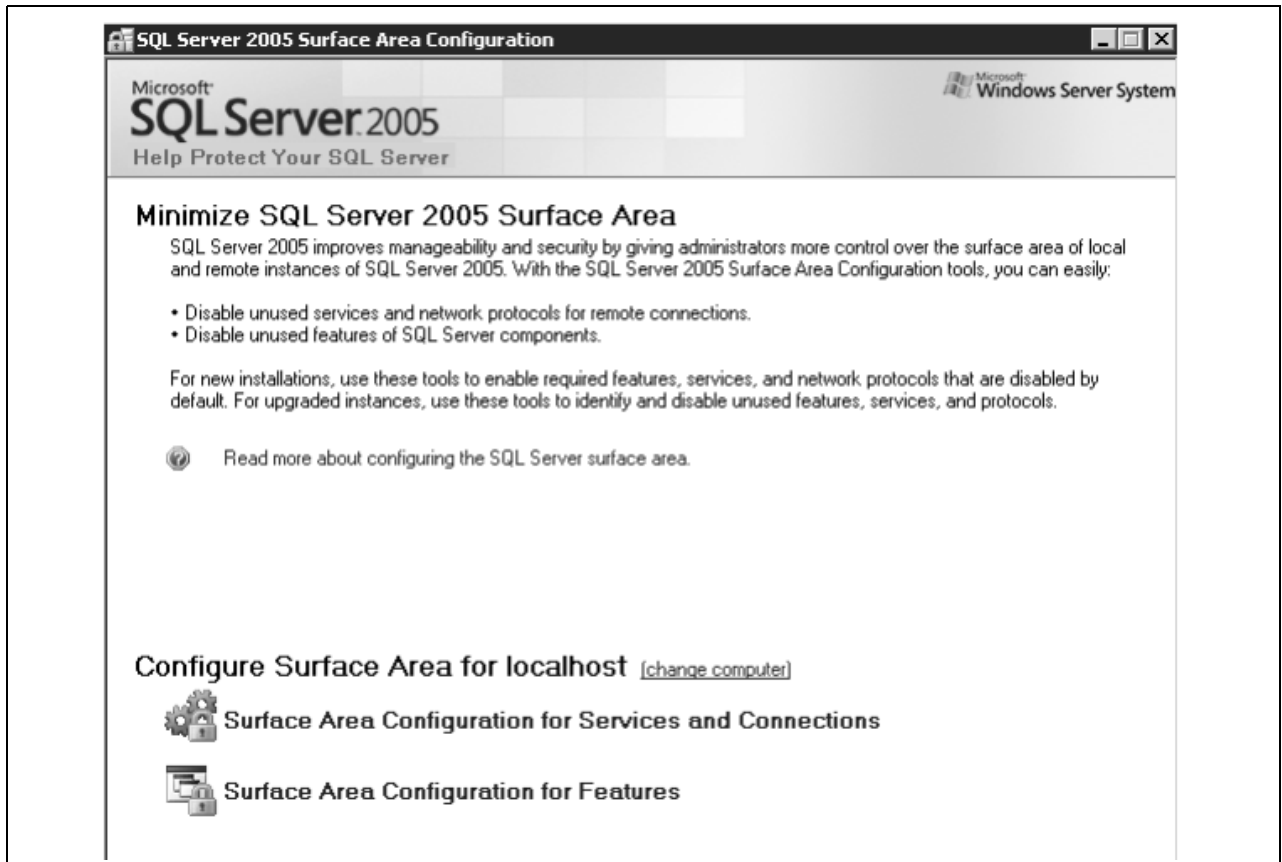
Select the Surface Area Configuration tool link.





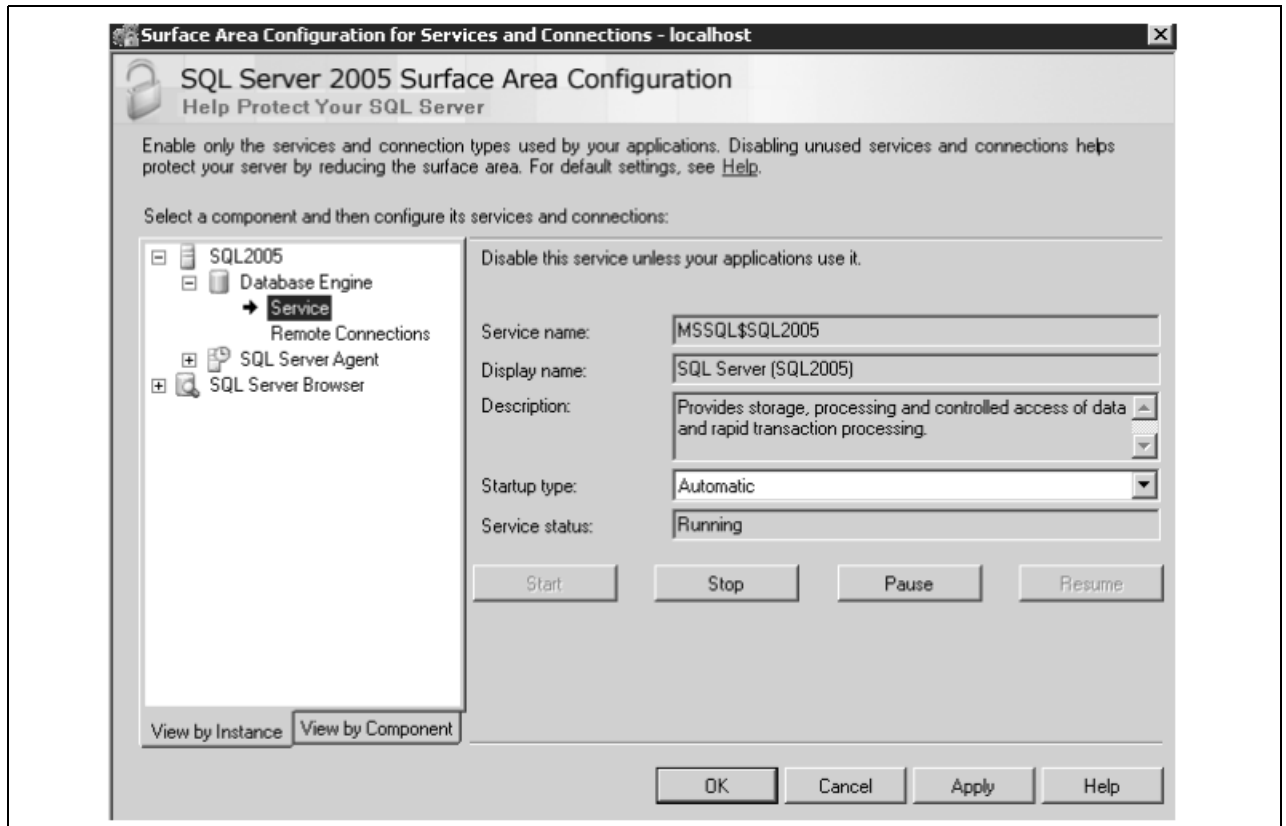
Completing Microsoft SQL Server 2005 Setup window

18. Select Surface Area Configuration for Services and Connections.



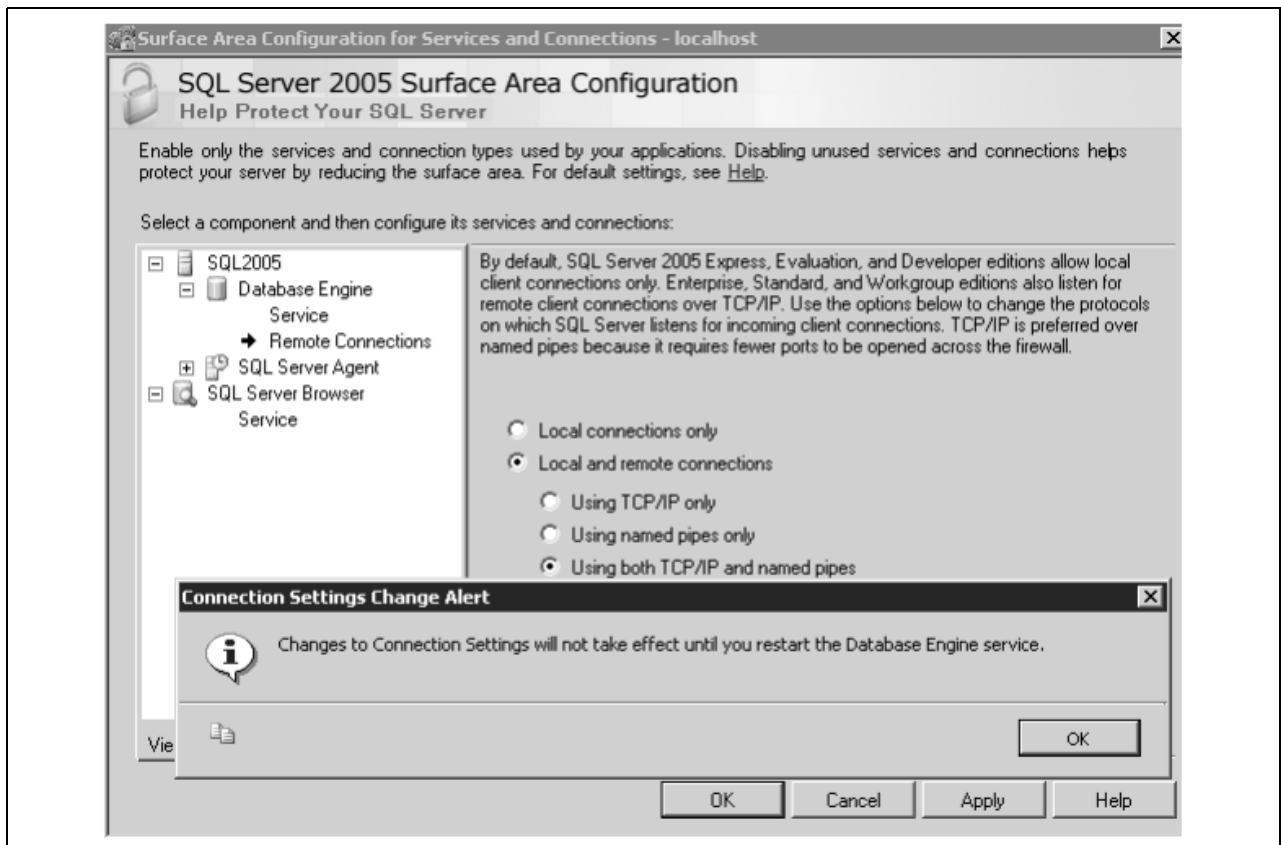
SQL Server 2005 Surface Area Configuration window

19. Under Database Engine, highlight Remote Connections.



SQL Server 2005 Surface Area Configuration window

20. On the right side of the window, select the Using both TCP/IP and named pipes radio button and click OK on both the message dialog box and the SQL Server 2005 Surface Area Configuration window.



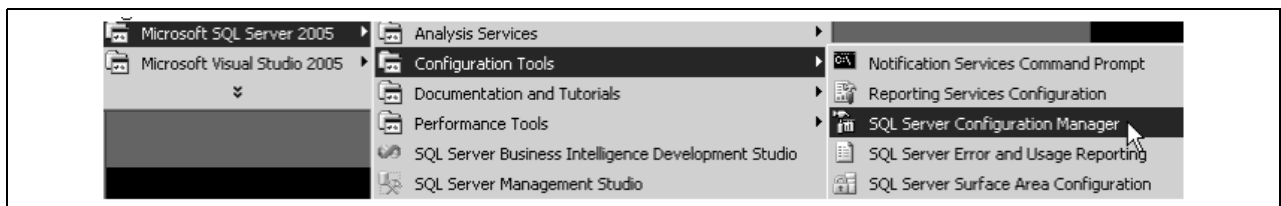
Specifying Remote Connections

21. Accept the changes and click Finish.

## Task C-2: Starting and Stopping Microsoft SQL Server 2005

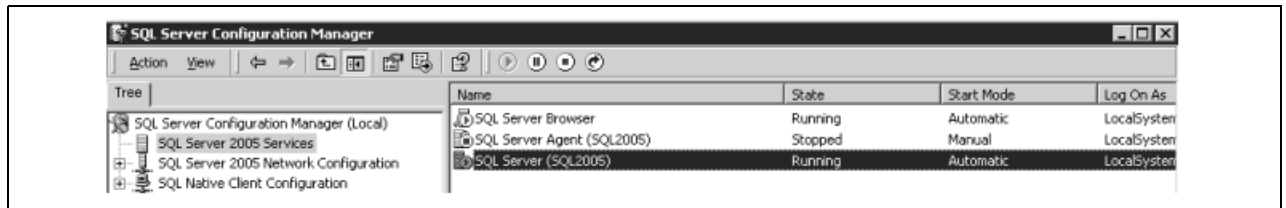
To start or stop the server:

1. Select Start, Programs, Microsoft SQL Server 2005, Configuration Tools, SQL Server Configuration Manager.



Starting SQL Server Configuration Manager

2. On the left side of the window select SQL Server 2005 Services, and on the right side select the server or instance name you want to start or stop.

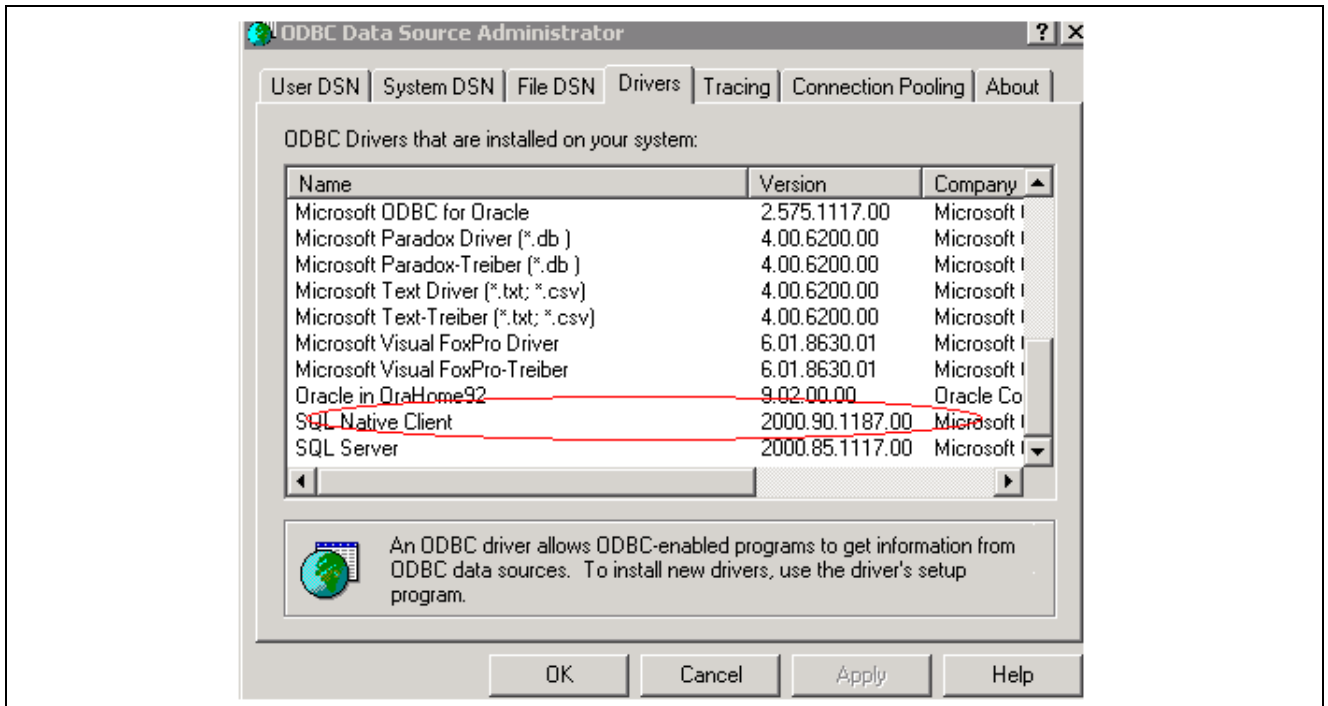


SQL Server Configuration Manager

- If the service is running (for example, SQLServer (SQL2005)), click the stop button (■).  
If the service is stopped, click the start button (▶).

## Task C-3: Configuring the Connection to Use SNAC

SQL Server 2005 provides a new connectivity product named SQL Native Access Client (SNAC). When configuring ODBC to connect to your SQL Server 2005 databases make sure you use this new client. The only certified configuration uses this client to connect to SQL Server 2005.



ODBC Data Source Administration dialog box



## APPENDIX D

# Installing PeopleBooks

This appendix discusses:

- Understanding PeopleBooks
- Installing PeopleBooks
- Implementing the PSOL Server for PeopleBooks
- Setting up a Reverse Proxy Server
- Configuring Context-Sensitive Help
- Administering PeopleBooks

---

## Understanding PeopleBooks

PeopleBooks are the documentation delivered with PeopleTools and every PeopleSoft application. This appendix describes how to install and configure PeopleBooks so that you can deploy the PeopleSoft documentation at your site.

There are three options for configuring PeopleBooks. Most sites will want to take advantage of all three.

- *Browse*: Browse the PeopleBooks from a file server or web server.
- *Full-text Search*: Requires installation of the PeopleSoft Pure Internet Architecture and hosting PeopleBooks on a web server.
- *Context-sensitive help*: Configure PeopleTools to call PeopleBooks as context-sensitive help from both internet applications and Windows-based programs. For instance, when a user clicks the Help link in a browser or presses F1 in Windows, the appropriate documentation appears.

---

**Note.** The F1 button calls PeopleBooks Help only for the PeopleTools Development Environment (the Windows-based client). If you press F1 while using the portal, you invoke the help for your current browser. For context-sensitive help in the portal, end users need to click the Help link to call PeopleBooks Help.

---

---

## Task D-1: Installing PeopleBooks

This section discusses:

- Prerequisites
- Installing the PeopleBooks CD

## Prerequisites

You can install PeopleBooks to your PeopleTools 8.49 dedicated web server machine or to a separate web server machine. Either way, the web server software must be installed before you install PeopleBooks. You can also install PeopleBooks on a file server, but you will not be able to search or to use PeopleBooks as context-sensitive help for your PeopleSoft applications.

Before you begin the installation, make sure you are installing to a supported web server and operating system platform. PeopleBooks 8.49 is supported on the same web server platforms as the PeopleSoft Pure Internet Architecture (PIA) for PeopleTools 8.49, and on the same operating systems as the PeopleTools 8.49 application server.

---

**Note.** PeopleBooks must be installed on a system other than HP-UX Itanium if full-text search is required. Full-text search is currently not available on HP systems.

---

### See Also

*Enterprise PeopleTools 8.49 Hardware and Software Requirements*

PeopleSoft Customer Connection (Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms, PeopleSoft Enterprise)

## Task D-1-1: Installing the PeopleBooks CD

PeopleBooks can be installed directly to a Windows, Linux or UNIX machine. In addition, PeopleBooks can be installed over an existing PeopleBooks site, effectively upgrading the site and merging in new content. (Duplicate book titles will be overwritten.)

---

**Note.** The PeopleSoft Pure Internet Architecture file structure has changed for PeopleTools 8.44 and above, so you cannot install PeopleBooks 8.49 into a pre-8.44 PIA site. However, after installing PIA 8.49, you can move your old PeopleBooks structure into the PSOL web module directory created during the PIA installation, and then install PeopleTools PeopleBooks 8.49 on top of it.

---

---

**Note.** The following instructions are based on using the GUI InstallShield program. If you run the installation in console mode, follow the instructions on your command line to make selections and progress through the installation prompts.

---

To install the PeopleBooks CD:

1. If your server does not have a built-in CD-ROM drive, share a CD-ROM drive elsewhere on the network and mount that drive on your server. You also have the option of copying the CDs to the network.
2. On UNIX, if you have not run `psconfig.sh` in the current shell, run it now at the command line:  

```
. ./psconfig.sh
```
3. Insert the PeopleBooks CD into the CD-ROM drive.
4. If your Windows CD-ROM drive is set to `autorun`, the PeopleBook Installer welcome screen appears. Otherwise, at the command line launch the setup program for your operating system platform:



| Platform | Launch Program |
|----------|----------------|
| AIX      | setup.aix      |
| Linux    | setup.linux    |
| Solaris  | setup.solaris  |
| Windows  | setup.exe      |

---

**Note.** If you are installing to a UNIX machine and do not have a GUI interface tool, use the command `setup.<OS> -is:javaconsole -console`.

---

5. Enter your application license code and click Next.
6. Accept the license terms and click Next.
7. Select one of the following options, and click Next:
  - Option 1: Generate search collection on this product only.
  - Option 2: Generate search collection on entire site.

---

**Note.** The collection generation can take up to 20 minutes to complete per PeopleBooks CD. If you are installing multiple PeopleBooks CDs, you might want to install all but the last without building the collections, and then generate them for the entire site (option 2) when installing the last CD. You should also choose option 2 if you are installing over an older version of PeopleBooks.

You can generate or regenerate the search collections at any time after installation using the PSOL Manager utility.

---

See *About These PeopleBooks*, “Managing PeopleBooks and the PeopleSoft Online Library.”

- Option 3: Do not generate search collection

---

**Note.** If you do not plan to use the Full-Text Search functionality, select this option.

---

8. Select the PeopleTools web server that you are installing to and specify whether PIA is installed on the machine or not. Click Next.

---

**Note.** This information is used to build the default install path for PeopleBooks. If you are not using one of these web servers, it does not matter which you choose.

---

9. Enter paths for PeopleTools home, web server software and PSOL location:
  - Enter path to the PeopleTools home directory (<PS\_HOME>).  
Example: c:\pt8.49.
  - Enter the directory where you installed the Oracle Application Server (OAS), WebLogic, or WebSphere.  
For example:  
OAS: c:\Ora\_Home  
WebLogic: C:\bea\weblogic92  
WebSphere: c:\IBM\WebSphere

- Enter the path to the PSOL folder. For example:

OAS: c:\Oracle\j2ee\PeopleSoft\applications\PeopleSoft\PSOL

WebLogic: c:\pt8.49\webserv\peoplesoft\applications\peoplesoft\PSOL

WebSphere: c:\pt8.49\webserv\PSOL\_peoplesoft\installedApps\PSOL\_peoplesoftNodeCell\PSOL.ear\PSOL.war

- Click Next to proceed.

---

**Note.** This information is used to build the default install path for PeopleBooks. If you are installing to a non-PeopleTools machine, enter any valid directory. If you are installing to a web server other than OAS, WebLogic, or WebSphere, enter any valid directory.

---



---

**Warning!** If a message displays indicating no path was found to PSOL, this is either because PIA does not use a default domain/node name, or because PIA is not installed and you selected the “PIA” option on the previous panel. If you have a custom domain/node name, continue to the next step and be sure to edit the default path to reflect your PIA installation.

---

10. Enter the install location and click Next.

If you plan to use the Full-Text Search feature, you *must* specify a subdirectory *immediately* below the PSOL module directory in your PIA installation. *Edit the default path as necessary to reflect your PIA installation.*

---

**Note.** You can opt to use an install directory other than the default, 'html doc'. It will be created automatically.

---



---

**Note.** If you do not plan to use PeopleBooks Full-Text Search, you can enter any valid path you like—for instance, to the docroot of your alternate web server.

---

For OAS the path should be:

<OAS\_HOME>\j2ee\<domain\_name>\applications\<domain\_name>\PSOL\html doc

For WebLogic, the path should be:

<PS\_HOME>\webserv\<PIA\_domain\_name>\applications\peoplesoft\PSOL\html doc

For WebSphere, the path should be:

<PS\_HOME>\webserv\<PSOL\_domainName>\installedApps\<PSOL\_domainNameNodeCell>=>\PSOL.ear\PSOL.war\html doc

11. The screen now lists the PeopleBooks that you are entitled to install. If you do not want to install a particular book, deselect the check box next to that book title. Click Next.

---

**Note.** If you are running the installation to apply a maintenance patch, just click Next.

---

12. Specify whether you want to install the selected titles (default) or install just the PeopleBooks infrastructure (for applying maintenance patches only) and click Next.
13. Confirm your selections and click Next to install PeopleBooks.
14. After the CD content has been installed (and collections generated, if applicable), click Finish to end the setup program.

---

## Task D-2: Implementing the PSOL Server for PeopleBooks

This section discusses:

- Understanding PeopleBooks in the PeopleSoft Pure Internet Architecture
- Starting Oracle Application Server Components
- Managing the PSOL Server on WebLogic
- Starting WebSphere PSOL Components
- Updating the Registry PATH Parameter

### Understanding PeopleBooks in the PeopleSoft Pure Internet Architecture

If you are hosting PeopleBooks in a PIA installation that also hosts your PeopleSoft applications, you must run PeopleBooks, the PeopleSoft Online Library (PSOL) web module, as a separate server instance. The setup of the separate server differs slightly depending on the web server you are using:

- For Oracle Application Server (OAS), the PSOL server was created during the PIA installation. The commands to start all PeopleSoft services on OAS are given in the next section.

See Starting Oracle Application Server Components.

- For WebLogic, you were instructed to install PIA as a “Multiple Server Domain” if installing PeopleBooks on the same machine as PeopleTools. This means that PSOL is now configured to be run as a separate server (default port 6001).
- For WebSphere, you were instructed to install PIA as a “Multiple Server Domain” if installing PeopleBooks on the same machine as PeopleTools. This means that PSOL is already configured to run as a separate server. The port for the PSOL server is two numbers greater than the port number for PIA. For example, if port 80 was chosen as the port for PIA, the PSOL port will be 82.

See “Setting Up the PeopleSoft Pure Internet Architecture in GUI Mode,” Installing the PeopleSoft Pure Internet Architecture in GUI Mode.

If you are hosting PeopleBooks in a PIA installation that is independent of the PeopleSoft applications, there is no need to create or configure a new server instance, and you can skip this task.

You also do not need to carry out the steps in this task if you installed PeopleBooks on another web server that is independent of a PeopleSoft Pure Internet Architecture installation (Full-Text Searching disabled).

### Task D-2-1: Starting Oracle Application Server Components

On a Windows-based server, NT services are automatically created for the Oracle Application Server-based components. The services default to startup type Automatic. If the services have never been started or are set to type Manual, you may start up the web server by following the instructions below.

To manually start the Oracle Application Server, change to the `opmn\bin` directory under the OAS home directory and execute the appropriate `opmnctl` command as follows. The default port for the PeopleBooks (PSOL) server is 7777, unless the installer changed the port number at PIA creation time.

| Action            | Windows command                                 | UNIX command                            |
|-------------------|-------------------------------------------------|-----------------------------------------|
| To start services | C:\<OAS_HOME>\opmn\bin⇒<br>\opmctl.exe startall | \$OAS_HOME/opmn/bin/opmctl⇒<br>startall |
| To stop services  | C:\<OAS_HOME>\opmn\bin⇒<br>\opmctl.exe stopall  | \$OAS_HOME/opmn/bin/opmctl⇒<br>stopall  |

The resulting default Oracle Application Server URL for access to the PeopleBooks website is:

http://<machine\_name>:7777/PSOL/htmldoc/index.htm

## Task D-2-2: Managing the PSOL Server on WebLogic

This section discusses:

- Modifying the PSOL Admin Scripts
- Using the PSOL Admin Scripts

During the PeopleBooks installation, two script files were generated in the admin directory below your installation directory. You can use these scripts to manage your PSOL server.

---

**Note.** The PSOL script files will have a .bat extension on Windows machines and a .sh extension on UNIX machines. The following discussion omits the file extensions.

---

The two PSOL script files are:

- psolAdmin. The command script used to start the PSOL server, stop the PSOL server, etc.
- set\_psol\_env. A configuration script used to store information about your PSOL environment.

### Modifying the PSOL Admin Scripts

For convenience, you may want to copy the scripts from the admin directory to the location where your other web server scripts and commands are located. This is not required, however. The scripts will run properly no matter where they are located or where they are run from.

If you want to copy the scripts to the same directory where your other web server scripts are located, copy the scripts to <PS\_HOME>\webserv\<domain>

---

**Note.** The two script files *must* reside in the same directory.

---

Before you use the psolAdmin script, you should check the configuration in the set\_psol\_env script and compare it against the variable descriptions below. Make any necessary changes according to your system environment, depending upon whether your domain is Single Server or Multi Server. This script was created during the PeopleBooks installation and contains directory paths and other information required for launching the PSOL server properly. There are eight PSOL environment variables that you can verify and set accordingly:

| Variable        | Description                                                                                                                                                                             |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PSOL_SERVERNAME | This is the name of the server instance that runs PSOL. For WebLogic Multi Server Domain, this value is set to <i>PSOL</i> . For WebLogic Single Server Domain, it is set to <i>PIA</i> |

| Variable                | Description                                                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PSOL_SERVERURL          | This stores the URL of your WebLogic administration server domain and port. In some Multi Server Domain environments, it may be necessary to pass this value as an argument when starting the PSOL server. It is also necessary if the IP address of the PSOL server machine resolves to multiple values. In that case the URL should specify the proper IP address—for example: <code>http://55.234.667.91:9999</code> . |
| PSOL_SVC_NAME           | This is the name that will be used when creating a Windows service for PSOL.<br><br><b>Note.</b> On WebLogic, this name will be prepended with “peoplesoft - ”..                                                                                                                                                                                                                                                          |
| PSOL_PSHOME             | The location of your PeopleTools home directory.                                                                                                                                                                                                                                                                                                                                                                          |
| PSOL_WEBSERVER_HOME     | The location of your WebLogic or WebSphere installation.                                                                                                                                                                                                                                                                                                                                                                  |
| PSOL_WEBSERVER_CMD_PATH | The directory where your web server command scripts are stored. On WebLogic, this is <code>&lt;PS_HOME&gt;\webserver\&lt;domain&gt;\.bin</code> .                                                                                                                                                                                                                                                                         |
| PSOL_ENV_SCRIPT         | The path to the <code>set_psol_env</code> script (the file you are currently editing). If you moved your scripts in the previous step, be sure to update this path accordingly.                                                                                                                                                                                                                                           |
| PSOL_WEBSERVER_TYPE     | The web server you are running on.                                                                                                                                                                                                                                                                                                                                                                                        |

**Important!** If you make any changes to `set_env_psol`, save your changes and then also save a backup copy of the `set_psol_env` script under another name, as the script will be recreated with any subsequent PeopleBooks installation.

## Using the PSOL Admin Scripts

Once your scripts are edited and in the desired location, you can use `psolAdmin` to start and stop the PSOL server, as well as to install or uninstall a Windows service for PSOL.

**Note.** The following instructions assume that the script files are in the current working directory.

Enter each command at the command line. The command arguments must be in UPPERCASE. If you launch the script without an argument, explanatory text will be displayed.

| Action                | Command                      | Comment                                                                                                                                                            |
|-----------------------|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Start the PSOL server | <code>psolAdmin START</code> | On WebLogic in a multi server domain, you must launch the administration server before starting PSOL. To do this, use the <code>startWebLogicAdmin</code> command. |
| Stop the PSOL server  | <code>psolAdmin STOP</code>  | none                                                                                                                                                               |

| Action                            | Command                         | Comment                                                                                          |
|-----------------------------------|---------------------------------|--------------------------------------------------------------------------------------------------|
| Create a Windows service for PSOL | <code>psolAdmin INST_SVC</code> | Follow instructions below to modify the Windows Registry: "Updating the Registry PATH Parameter" |
| Remove the PSOL Windows service   | <code>psolAdmin RMV_SVC</code>  | Stop the PSOL service before attempting to remove it.                                            |

## Task D-2-3: Starting WebSphere PSOL Components

The PIA multiple server setup for WebSphere automatically generates the web components for PSOL. In addition, it creates a service for Windows 2003 Server. The PSOL server can be started manually from a command line, or from the Services interface in Windows.

- To start the WebSphere server manually on Windows or UNIX, the system environment variables must be updated with paths to psjniverity and Verity. Add values for the following environment variables on your system before proceeding:

| Operating System    | Environment Variable                                  | psjniverity                                                                                                                                | Verity                                                                  |
|---------------------|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|
| Windows 2003 Server | PATH                                                  | Add path to psjniverity.dll Example:<br>c:\pt849\webserv<br>\peoplesoft\applications<br>\peoplesoft\PSOL\WEB-INF\lib\winx86                | Add path to mkvdk.exe<br>Example: c:\pt849\verity<br>\winx86\_nti40\bin |
| Solaris             | PATH, LD_LIBRARY_PATH                                 | Add path to libpsjniverity.so.<br>Example: /apps/pt849<br>/webserv/peoplesoft<br>/applications/peoplesoft<br>/PSOL/WEB-INF/lib<br>\solaris | Add path to mkvdk<br>Example: /apps/pt849<br>/bin                       |
| AIX                 | PATH, LIBPATH                                         | Add path to libpsjniverity.a<br>Example: /apps/pt849<br>/webserv/peoplesoft<br>/applications/peoplesoft<br>/PSOL/WEB-INF/lib/aix           | Add path to mkvdk<br>Example: /apps/pt849<br>/bin                       |
| HP                  | Full text search is not supported on HP-UX or Itanium | Full text search is not supported on HP-UX or Itanium                                                                                      | Full text search is not supported on HP-UX or Itanium                   |

After the environment variables are set as specified above, change directory to the *bin* folder for PSOL. Execute the WebSphere script to start your server. For example:

```
CD /PT849/WEBSERV/PSOL_PEOPLESOFT/BIN
```

```
STARTSERVER SERVER1
```

- To run the WebSphere service on Windows 2003, follow instructions below, “Updating the Registry PATH Parameter”.

After the server starts successfully, PeopleBooks are available at the PSOL port.

---

**Note.** PSOL port number is two port numbers above PIA. For example, if PIA was built at port 80 then PSOL uses port 82.

---

The resulting default WebSphere URL for access to the PeopleBooks website is:

`http://<machine_name>:<PSOL_port>/PSOL/htmldoc/index.htm`

## Task D-2-4: Updating the Registry PATH Parameter

When running PSOL as a service, the search fails on Windows 2003 and affects the Windows Registry. The workaround is:

1. Stop the existing PSOL service.
2. Go to START, RUN, REGEDIT.
3. Drill down into the following key in the registry:  
[HKEY\_LOCAL\_MACHINE\SYSTEM\CurrentControlSet\Services\%SVCNAME%\Parameters]
4. Double-click, first the *Parameters* sub-key and then the *Path* sub-key.
5. Insert a semicolon (;) at the end of the line (no spaces in between) followed by the path to the verity folder. For example, append:  
;C:\PT8.49\verity\winx86\\_nti40\bin
6. Next, append another semicolon, and the path to the psjnaverity.dll:  
;C:\PT8.49\webserve\peoplesoft\applications\peoplesoft\PSOL\WEB-INF\lib\winx86
7. Close REGEDIT.
8. Restart PSOL web server.

Search should now work properly when using the PSOL server port number in a browser.

---

## Task D-3: Setting up a Reverse Proxy Server

A reverse proxy server (RPS) is a web server that acts as a front-end gateway to user requests, usually forwarding transaction requests to a back-end server and hosting the static HTML pages itself. WebLogic and WebSphere both support various popular web servers (Apache, Microsoft IIS, Sun ONE) as RPS platforms. If you would like to use WebLogic or WebSphere as a back-end server to an RPS, you can configure the RPS to host static PeopleBooks requests and forward PeopleBooks Full-Text Search (servlet) requests to the back-end server. More information on setting up an RPS can be found in the PeopleTools documentation. And instructions on configuring PeopleBooks on an RPS can be found in *About These PeopleBooks*.

## See Also

*Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration, “Working with BEA WebLogic”*

*Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration, “Working with IBM WebSphere”*

*About These PeopleBooks*, “Managing PeopleBooks and the PeopleSoft Online Library”

## Task D-4: Configuring Context-Sensitive Help

This section discusses:

- Enabling the Help Link from the Application Pages
- Enabling F1 Help

## Task D-4-1: Enabling the Help Link from the Application Pages

Each page in your PeopleSoft applications includes a Help icon that, when clicked, opens a new browser window displaying help topics that discuss that page.

To enable the Help link from application pages:

1. In your PeopleSoft application, navigate to the PeopleTools, Web Profile, Web Profile Configuration page.
2. Click Search and select the Profile Name you specified during your PeopleSoft Pure Internet Architecture installation.
3. Change the value for the Help URL field by replacing the "helpweb server" string with the domain name and port number of your web server. Also, if you installed to a directory other than "htmldoc" (the default), replace "htmldoc" accordingly.

*Example:*

If your PSOL server is named “mywebserver” and listens to port 5080, you would modify the default Help URL from:

http://helpweb server/htmldoc/f1search.htm?ContextID=%CONTEXT\_ID%&LangCD=%LANG\_CD%&

to:

http://mywebserver:5080/PSOL/htmldoc/f1search.htm?ContextID=%CONTEXT\_ID%&LangCD=>



%LANG\_CD%

**Note.** The system resolves %CONTEXT\_ID% to the page name from which you called help. The system resolves %LANG CD% to the signon language of the user.



---

**Note.** If you do not want the Help icon to display in your applications, clear the Help URL field value.

---

---

**Note.** The default port for PSOL in a WebLogic multi-server domain installation is 6001.

---

4. Save and exit the Web Profile Configuration page.
5. Before testing help functionality, purge the browser cache on the client and close all web browsers.  
Restart the application server and web server for PIA.
6. Test the help functionality by clicking the *Help* icon on a PeopleSoft application page.

## Task D-4-2: Enabling F1 Help

This procedure describes how to enable F1 help for Application Designer, PeopleCode Editor, and other Windows-based PeopleSoft programs.

To enable F1 help:

1. Sign on to your PeopleSoft application using your browser.
2. Navigate to the PeopleTools, Utilities, Administration, PeopleTools Options page.
3. Enter the same URL as in the previous procedure (where `<web_server>/<directory>/` reflects your installation) into the F1 Help URL field:

```
http://<web_server>/<directory>/f1search.htm?ContextID=%CONTEXT_ID%&LangCD=>=>
%LANG_CD%
```

4. Save the page.

---

## Task D-5: Administering PeopleBooks

A special browser-based tool, `psolmanager.htm`, may assist you in administering your PeopleBooks web site.

For security purposes, this tool is disabled by default on installation. When enabled, you may use it to recreate collections upon demand, and view system parameters.

See *About These PeopleBooks*, “Managing PeopleBooks and the PeopleSoft Online Library”



## APPENDIX E

# Installing PeopleTools Mobile Agent

This appendix discusses:

- Understanding PeopleTools Mobile Agent
- Finding the Installation Program
- Installing PeopleTools Mobile Agent on a Laptop
- Installing PeopleTools Mobile Agent on a PDA
- Modifying, Repairing, or Removing PeopleTools Mobile Agent
- Expediting the Initialization of a PDA
- Troubleshooting Installation Issues

---

## Understanding PeopleTools Mobile Agent

This chapter describes how to install the PeopleTools Mobile Agent software to a laptop computer or personal digital assistant (PDA).

The PeopleTools Mobile Agent is a product that is licensed separately from the PeopleTools product, and only those customers who have a license for PeopleTools Mobile Agent may install and use this product. Use of the Mobile Agent functionality described herein is subject to the licensing conditions for the PeopleTools Mobile Agent product. Please refer to the applicable contract to determine restrictions regarding this product.

---

## Task E-1: Finding the Installation Program

The installation program for PeopleTools Mobile Agent can be delivered in several ways:

- From a web site established by your administrator.
- From an FTP site established by your administrator.
- As an attachment to an email.
- As a link to a web or FTP site in an email.
- In the mobile portal web site directory of your web server:

---

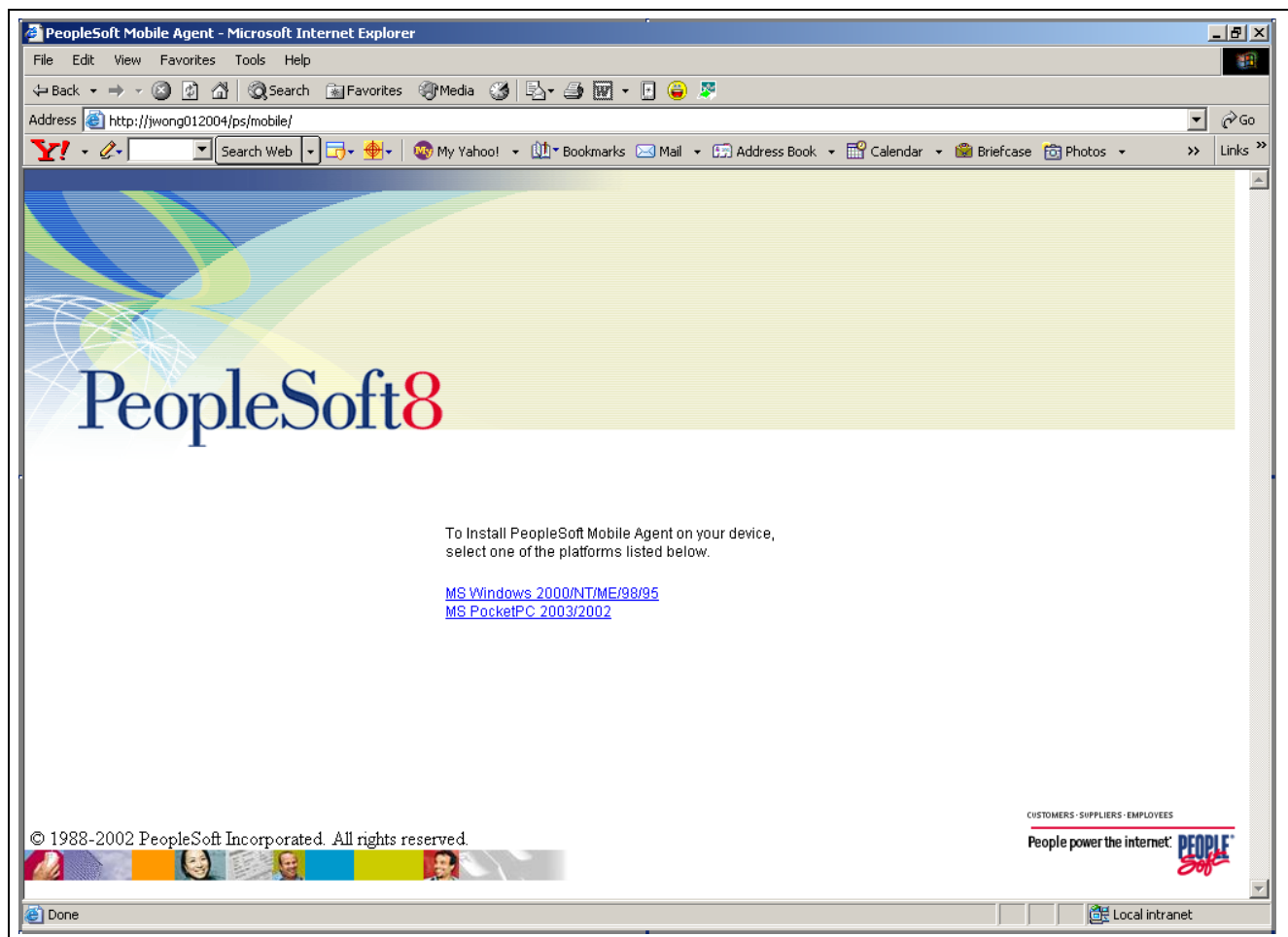
**Note.** PeopleSoft delivers a sample index.html file to be used to deploy the PeopleSoft Mobile Agent from a web site. This is only a sample and needs to be modified if it is to support web server configurations other than the delivered defaults and provide option of customer branding.

---

- On an Oracle Application Server web server the location of index.html is  
c:\<OAS\_HOME>\j2ee\PeopleSoft\applications\PeopleSoft\PORTAL\ps\mobile
- On a BEA WebLogic web server the location of index.html is  
c:\<PS\_HOME>\websrv\peoplesoft\applications\peoplesoft\PORTAL\ps\mobile\
- On an IBM WebSphere web server the location of index.html is  
c:\<PS\_HOME>\websrv\<cellname\_nodename\_servername>\peoplesoft.ear\PORTAL\ps\mobile\

## Task E-2: Installing PeopleTools Mobile Agent on a Laptop

Use a web page like the following to distribute PeopleTools Mobile Agent installation files.



PeopleSoft 8 window

To install PeopleTools Mobile Agent on a laptop:

1. Locate and run setup.exe:  
The PeopleTools Mobile Agent Setup window appears.
2. Click Next.

3. Specify the directory in which PeopleTools Mobile Agent will be installed, or accept the default.
4. Click Next.
5. Select whether to automatically start PeopleTools Mobile Agent on login.
6. Click Next.
7. Select the preferred language.  
After installation, you cannot change this selection except by reinstalling PeopleTools Mobile Agent.
8. Click Next.
9. Enter the address of your Sync Server in the URL text box.  
This address will usually be the same as that of your PIA web server. For example, if you access PeopleSoft applications at <http://mywebserver/ps/signon.html>, your Sync Server address is <http://mywebserver:80/SyncServer>. Contact your system administrator to confirm this information.
10. Click Next.  
A summary page appears, listing your installation selections.
11. Click Back to change a selection, or click Next to proceed with installation.
12. Click Finish when the installation completion window appears.

---

## Task E-3: Installing PeopleTools Mobile Agent on a PDA

Installing PeopleTools Mobile Agent to a PDA requires:

- Installing the appropriate version of PeopleTools Mobile Agent to the computer that connects to your PDA.
- Installing PeopleTools Mobile Agent to your PDA.

---

**Note.** The following procedure assumes that you have already established connectivity between the computer and PDA, including applicable synchronization software.

---

To install PeopleTools Mobile Agent on a PDA:

1. Locate and run `setup_<processor_type>.exe`:  
The <processor\_type> is the type of processor present in the PDA to which PeopleTools Mobile Agent is being installed.  
The PeopleTools Mobile Agent Welcome window appears.
2. Click Next.
3. Specify the directory in which PeopleTools Mobile Agent will be installed on the computer, or accept the default.
4. Click Next.
5. Select the preferred language.  
The only way you can change the preferred language on the PDA is by reinstalling PeopleTools Mobile Agent.
6. Click Next.

7. Enter the address of your Sync Server in the URL text box and click Next.  
This address will usually be the same as that of your PIA web server. For example, if you access PeopleSoft applications at <http://mywebserver/ps/signon.html>, your Sync Server address is <http://mywebserver:80/SyncServer>. Contact your system administrator to confirm this information.
8. Click Next.  
A summary page appears, listing your installation selections.
9. Click Back to change a selection, or click Next to proceed with installation.  
The ActiveSync Add/Remove Programs dialog box appears.
10. Confirm the installation.  
The installation proceeds. A completion message appears when installation to the PDA has finished.
11. Click Finish when the installation completion window appears.

---

## Task E-4: Modifying, Repairing, or Removing PeopleTools Mobile Agent

To modify, repair, or remove PeopleTools Mobile Agent:

1. Locate and run the appropriate program:

| Installation | Program                    |
|--------------|----------------------------|
| Laptop       | Setup.exe                  |
| PDA          | Setup_<processor_type>.exe |

The PeopleTools Mobile Agent Welcome window appears.

2. Select:
  - *Modify* to specify another preferred language
  - *Repair* to reinstall all program components
  - *Remove* to remove all installed components

You are asked to confirm any changes to the current installation.

---

## Task E-5: Expediting the Initialization of a PDA

If PeopleTools Mobile Agent is installed to a PDA, you have the option of using the processing power of the connected computer to expedite initialization (bootstrap synchronization) or update applications synchronization.

To expedite the initialization of a PDA:

1. From the Start menu of the computer connected to your PDA, select *Programs, PeopleTools Mobile Agent, PS Sync PDA*.

- The PeopleTools Mobile Device Bootstrap page appears.
2. Enter your User ID and Password.  
Your User ID and its associated roles determine the application metadata and business data that will be installed to your mobile device.
  3. Click *Synchronize*.  
The PeopleTools Mobile Synchronization Results page appears, showing the progress of your bootstrap synchronization.
  4. After Update PDA Applications completes successfully, open the PeopleSoft program folder on the PDA.
  5. Start PS Mobile Agent.
  6. Start PS Mobile Application.
  7. Select *Synchronization, Last Results* to view the synchronization results.

---

## Task E-6: Troubleshooting Installation Issues

This section discusses:

- Resolving Port Conflicts
- Configuring the Web Server

### Task E-6-1: Resolving Port Conflicts

The default HTTP listening port for PeopleTools Mobile Agent is port 8080, which is specified in the `psmobile.ini` file. If possible, ensure that port 8080 is not used by another application. If PeopleTools Mobile Agent encounters a port conflict because another process is already using port 8080, it reports an error in the log file (`\temp\psmobile.log`), and stops processing.

You can resolve the conflict by editing the `psmobile.ini` file. For example, change `Port=8080` to `Port=80` or `Port=8888`.

- For a laptop installation, edit the Port setting in the `psmobile.ini` file.  
Find the file in `C:\Windows` or `C:\WinNT`.
- For a PDA installation, copy the `psmobile.ini` file to the laptop or desktop computer using ActiveSync, edit it there, and then copy it back.

After changing the port assignment in `psmobile.ini`, start PeopleTools Mobile Agent to determine whether the new setting is acceptable.

---

**Note.** If you change the port assignment in `psmobile.ini`, update any shortcuts, bookmarks, or favorites that reference the changed setting. For example, if you changed `Port=8080` to `Port=8888`, change a browser favorite or bookmark from `http://localhost:8080` to `http://localhost:8888`. If you use PS Sync PDA to expedite PDA synchronization, change the port number in any shortcuts to the port number specified in `psmobile.ini` + 1. For example, if you change `psmobile.ini` to `Port=8888`, change the PS Sync PDA shortcut to `http://localhost:8889`.

---

### Task E-6-2: Configuring the Web Server

Configure the web server to identify the application server (Sync Server gateway) used for synchronization.

To configure the web server, edit the file SyncServerGatewayConfig.xml. The location of this file depends on the web server.

| Web Server                | Directory Path                                                                               |
|---------------------------|----------------------------------------------------------------------------------------------|
| Oracle Application Server | c:\<OAS_HOME>\j2ee\PeopleSoft\applications\PeopleSoft\PORTAL\WEB-INF\psftdocs\ps             |
| BEA WebLogic              | c:\<PS_HOME>\weberv\peoplesoft\applications\peoplesoft\PORTAL\WEB-INF\psftdocs\ps            |
| IBM WebSphere             | c:\<PS_HOME>\weberv\<cellname_nodename_servername>\peoplesoft.ear\PORTAL\WEB-INF\psftdocs\ps |

Edit the file to reflect your environment, where:

- *Domain #1 Name Here* is an optional name for the gateway.
- *Domain #1 Description Here* is an optional description for the gateway.
- *Domain #1 Application Server Connect String Here* is the machine name and JSL port number for the gateway.
- *APP\_SRVRS* is the number of application servers configured for this gateway.

```
<?xml version='1.0'?>
<sync-gateway-config>
 <primary-domain>1</primary-domain>
 <trace-level>0</trace-level>
 <max-timeslice>10</max-timeslice>
 <domain-list>
 <domain id='1' version='1'>
 <name>Domain #1 Name Here</name>
 <description>Domain #1 Description Here</description>
 <connect>Domain #1 Application Server Connect String Here</connect>
 <thread-pool-size>APP_SRVRS</thread-pool-size>
 </domain>
 </domain-list>
</sync-gateway-config>
```



## APPENDIX F

# Installing Web Application Deployment Tools

This appendix discusses:

- Prerequisites
- Installing the Web Application Deployment Tools on Oracle Application Server in GUI Mode
- Installing the Web Application Deployment Tools on WebLogic in GUI Mode
- Installing the Web Application Deployment Tools on WebSphere in GUI Mode
- Installing the Web Application Deployment Tools on Oracle Application Server in Console Mode
- Installing the Web Application Deployment Tools on WebLogic in Console Mode
- Installing the Web Application Deployment Tools on WebSphere in Console Mode
- Testing and Troubleshooting the Web Application Deployment

---

## Prerequisites

This appendix includes instructions for installing the Web Application Deployment tools on Oracle Application Server (OAS), WebLogic, and WebSphere. Complete the instructions for the web server you selected when you carried out the PeopleTools installation. Typically, you would choose GUI mode for Windows platforms and console mode for UNIX or Linux platforms.

Before you install the Web Application Deployment tools, confirm that you have completed the following requirements.

If you use OAS as your web server, you must fulfill these requirements:

- You must install the PeopleSoft web server during the PeopleTools installation.
- The OAS 10g software must be installed.

If you use WebLogic as your web server, you must fulfill these requirements:

- JDK 1.5 must be installed and working properly. Your PATH environment variable must include an entry for JDK 1.5 (for example, <jdk 1.5.0>/bin). If you do not install JDK 1.5 the deployment will fail due to the absence of a java compiler.
- You must install the PeopleSoft web server during the PeopleTools installation.
- WebLogic 9.2 must be installed.

If you use WebSphere as your web server, you must fulfill these requirements:

- JRE 1.5.0 or above must be installed and working properly. You can use the JRE software that is supplied with the PeopleTools installation CD.

- You must install the PeopleSoft web server during the PeopleTools installation.
- The WebSphere 6.1 software must be installed and the web server must be up and running when you carry out the Web Application Deployment tools installation.
- If you are running on UNIX or Linux, run the Web Application Deployment install with a user who owns WebSphere, and who owns <PS\_HOME>. Here are two examples: If WebSphere is owned by "root" and group "system", the Web Application Deployment install must be run with "root" and group "system." If WebSphere is owned by user "wsadmin" and group "wsadmin", then the Web Application Deployment install must be run with wsadmin/wsadmin as the user and group.

### See Also

“Installing Web Server Products”

“Using the PeopleSoft Installer”

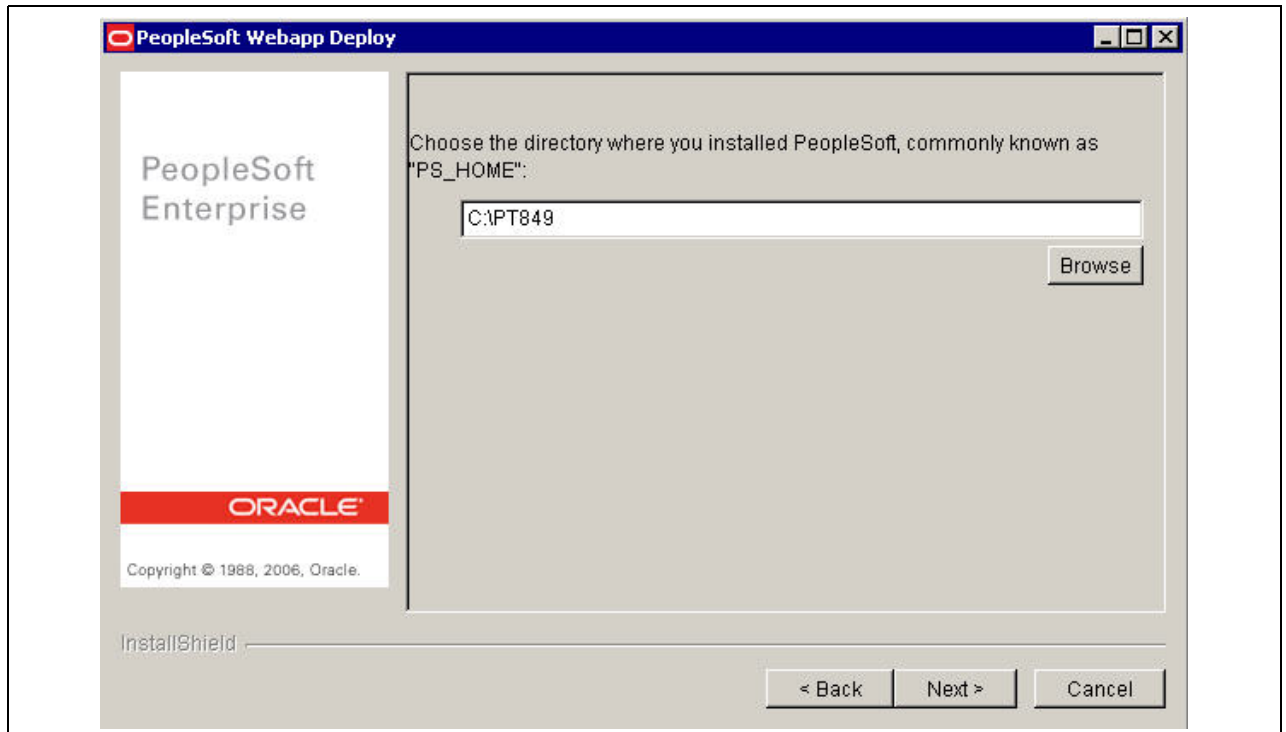
*Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration.*

---

## Task F-1: Installing the Web Application Deployment Tools on Oracle Application Server in GUI Mode

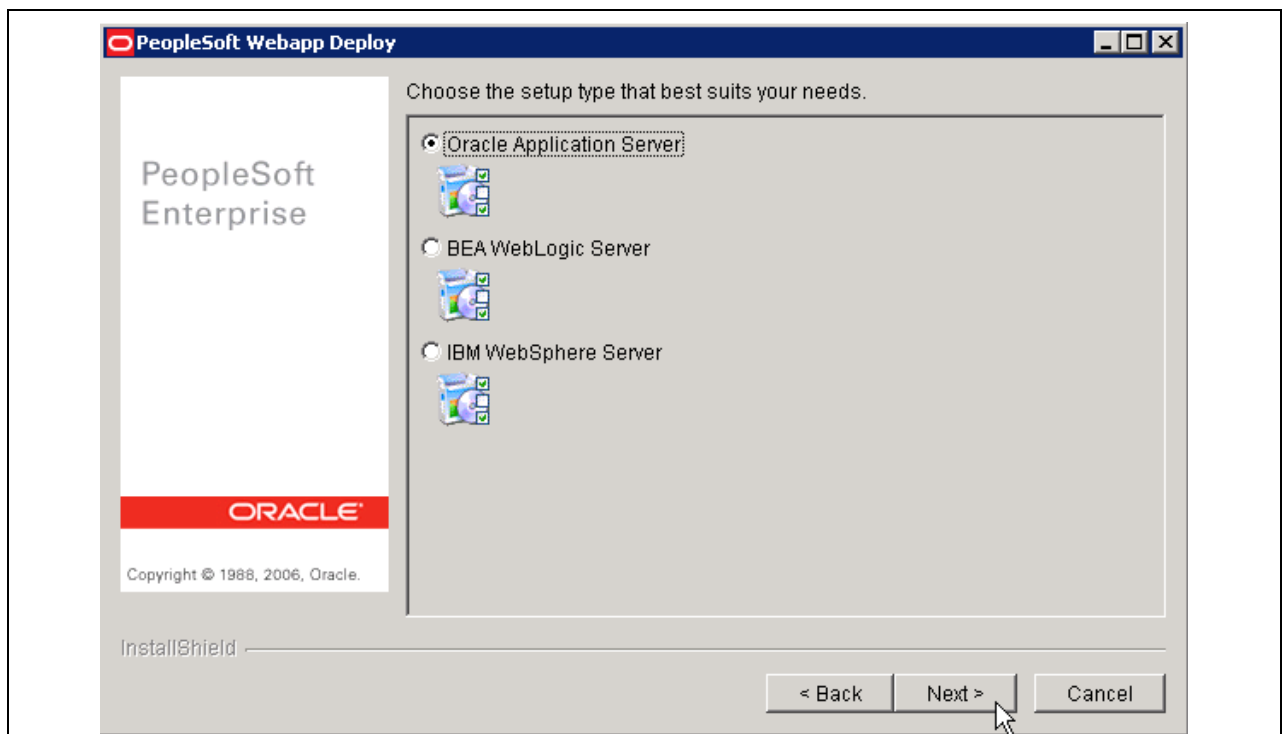
To install the Web Application Deployment tools on Oracle Application Server (OAS):

1. Copy the required Web application (EAR) files to <PS\_HOME>/setup/PsMpWebAppDeployInstall/archive.
2. Navigate to <PS\_HOME>/setup/PsMpWebAppDeployInstall.
3. Double-click on setup.<OS>.
4. Click Next on the Welcome page.
5. Enter the same <PS\_HOME> that you specified when you ran the PeopleTools installer, and click Next.



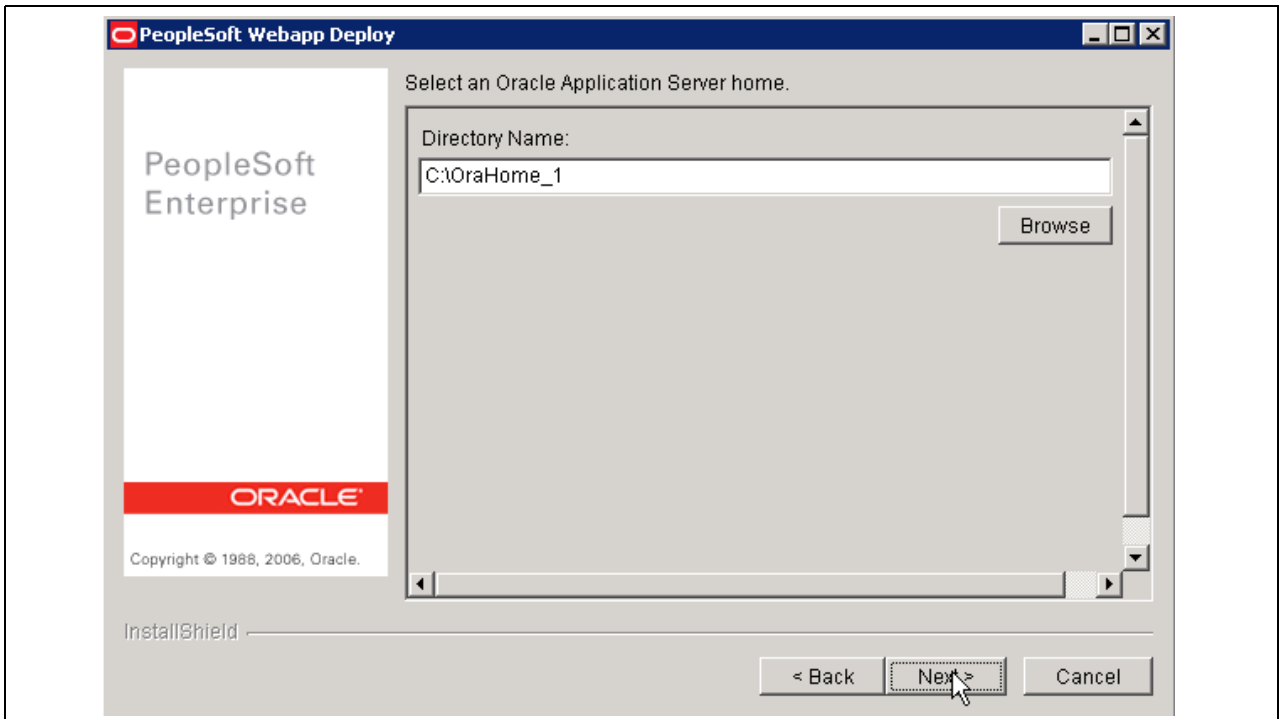
Specifying directory on PeopleSoft Webapp Deploy window

6. Accept Oracle Application Server as the setup type, and click Next.



Selecting Oracle Application Server

7. Specify the OAS home directory, or accept the default, and click Next.  
This is the directory where you installed the OAS software.



Specifying OAS home on the PeopleSoft Webapp Deploy window

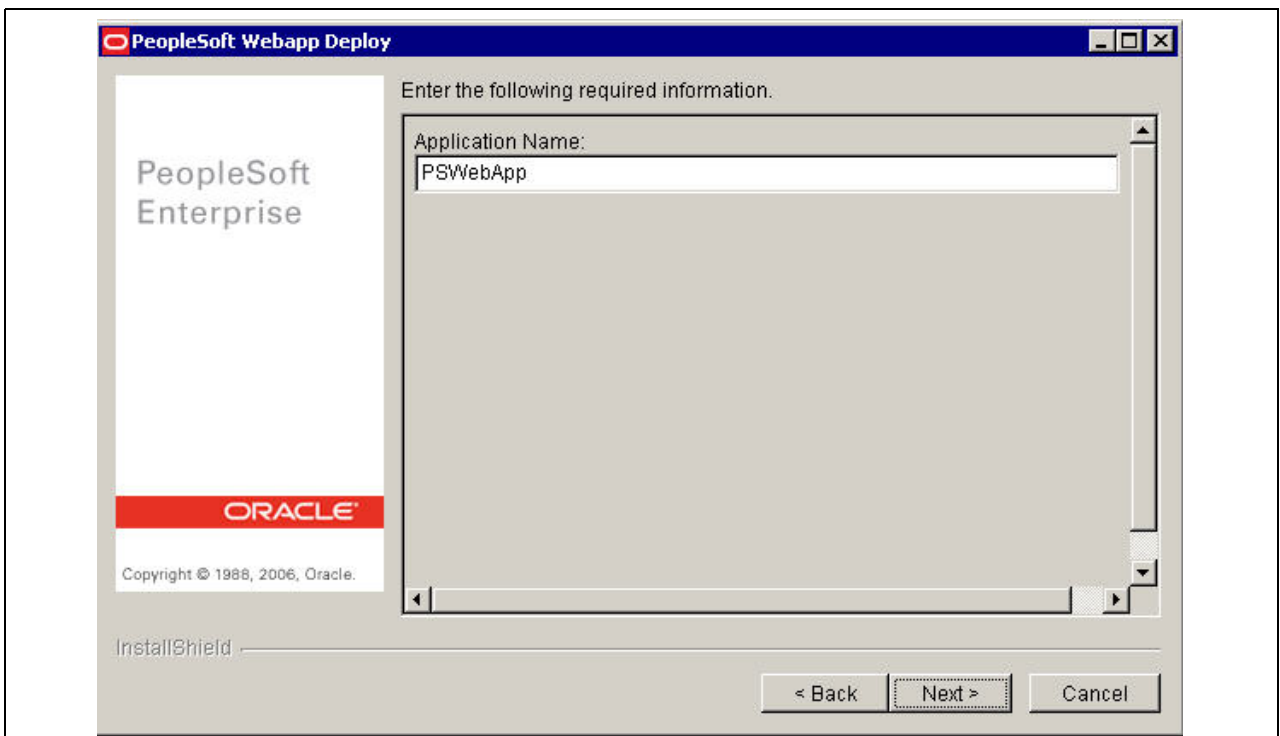
8. Enter an application name, and click Next.

---

**Note.** This is not a PeopleSoft Application package name.

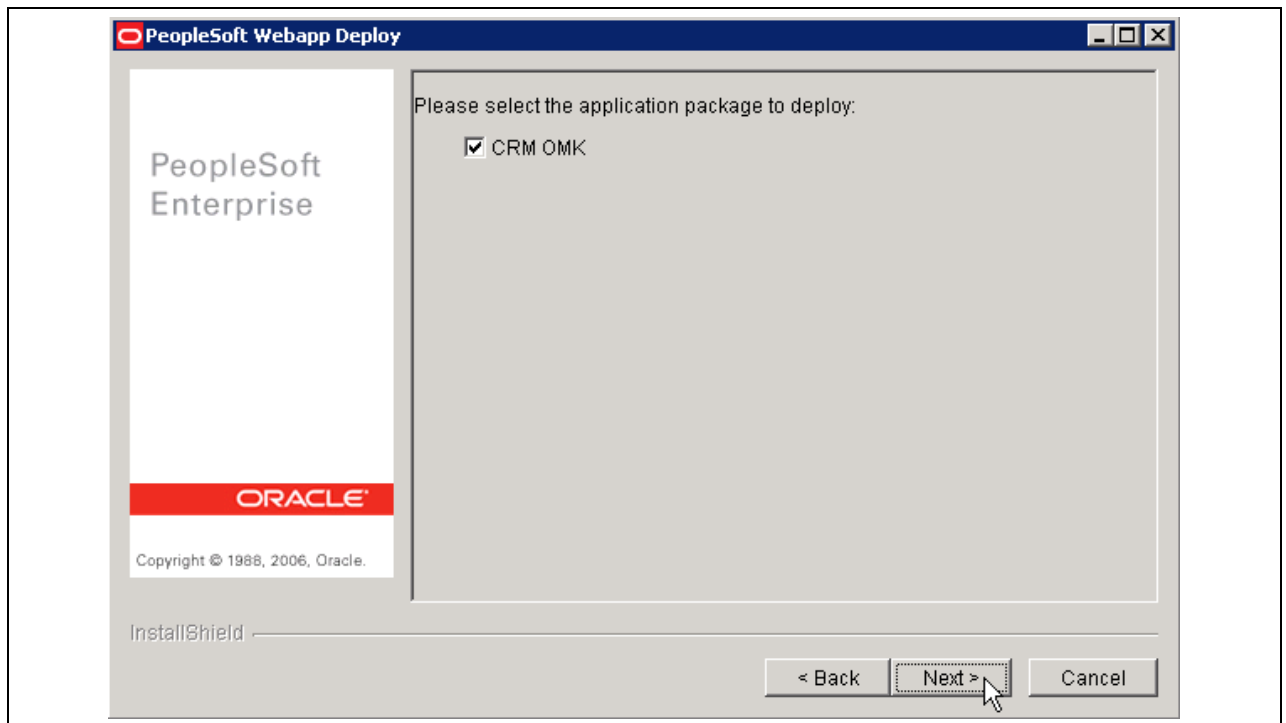
---

A new OC4J component will be created using the user-specified application name.



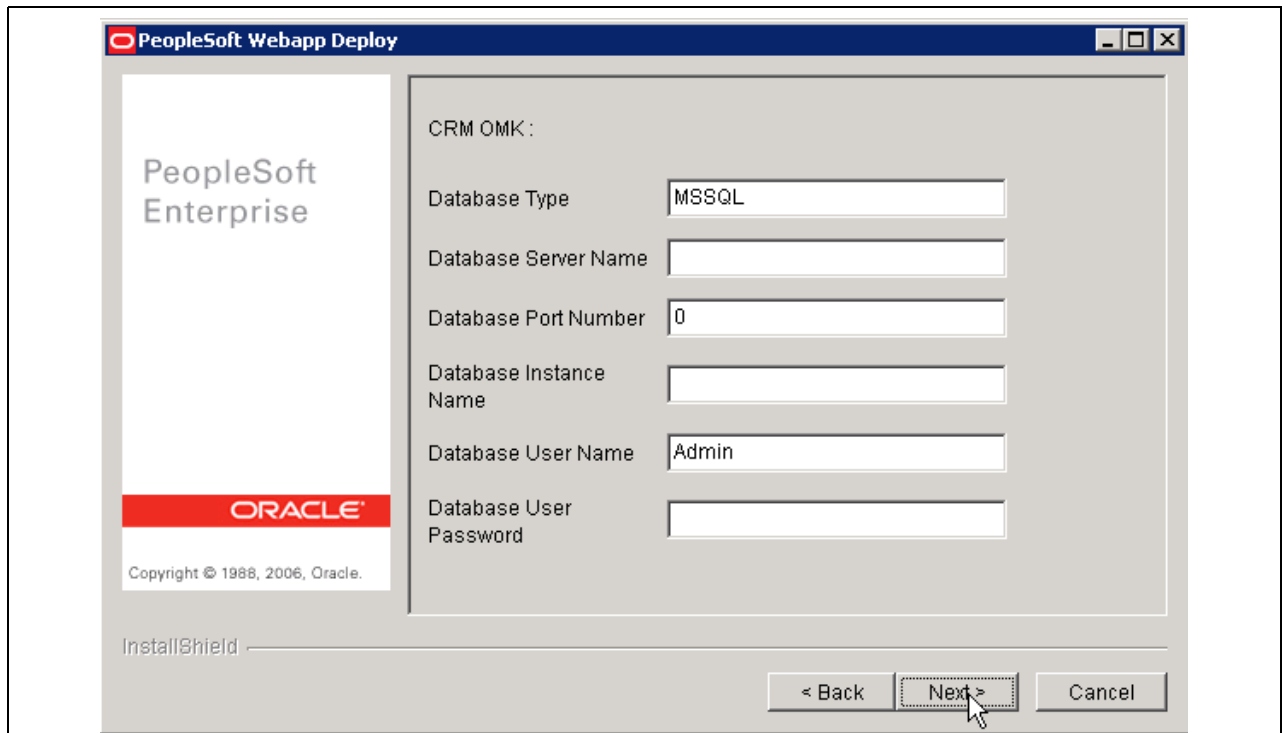
Entering the Application Name for the PeopleSoft Webapp Deploy window

9. Select the application package to deploy, and click Next.



Selecting the application package on the PeopleSoft Webapp Deploy window

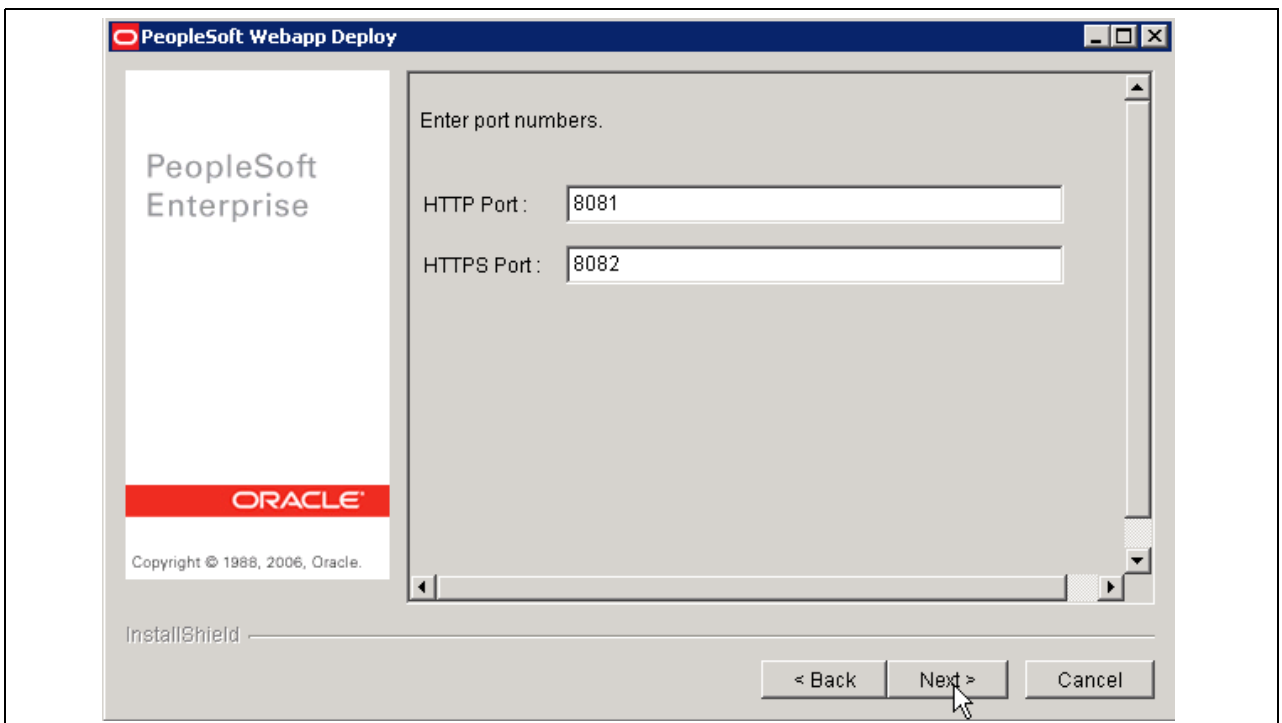
10. Specify Application Information:



Entering application information on PeopleSoft Webapp Deploy window

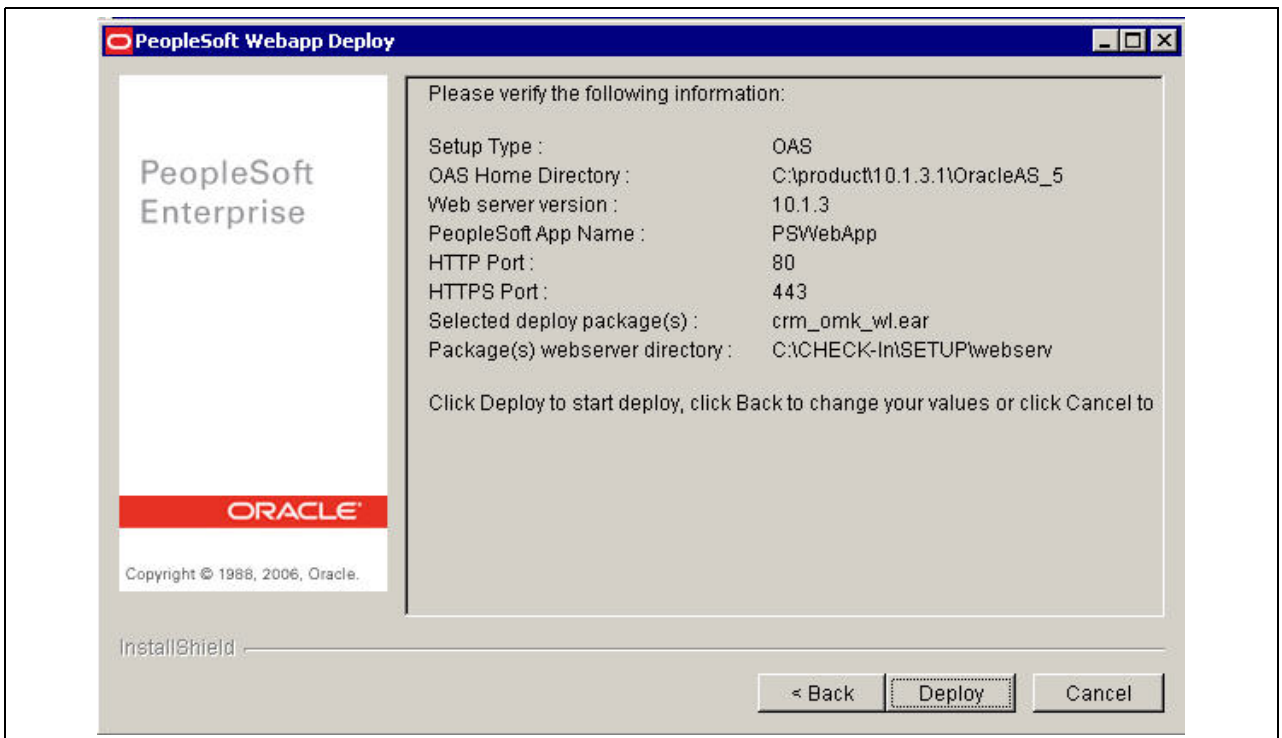
11. Enter port numbers, and click Next.

**Note.** Review the reserved port numbers for OAS in the file <OAS\_HOME>/install/portlist.ini and enter a different port number here.



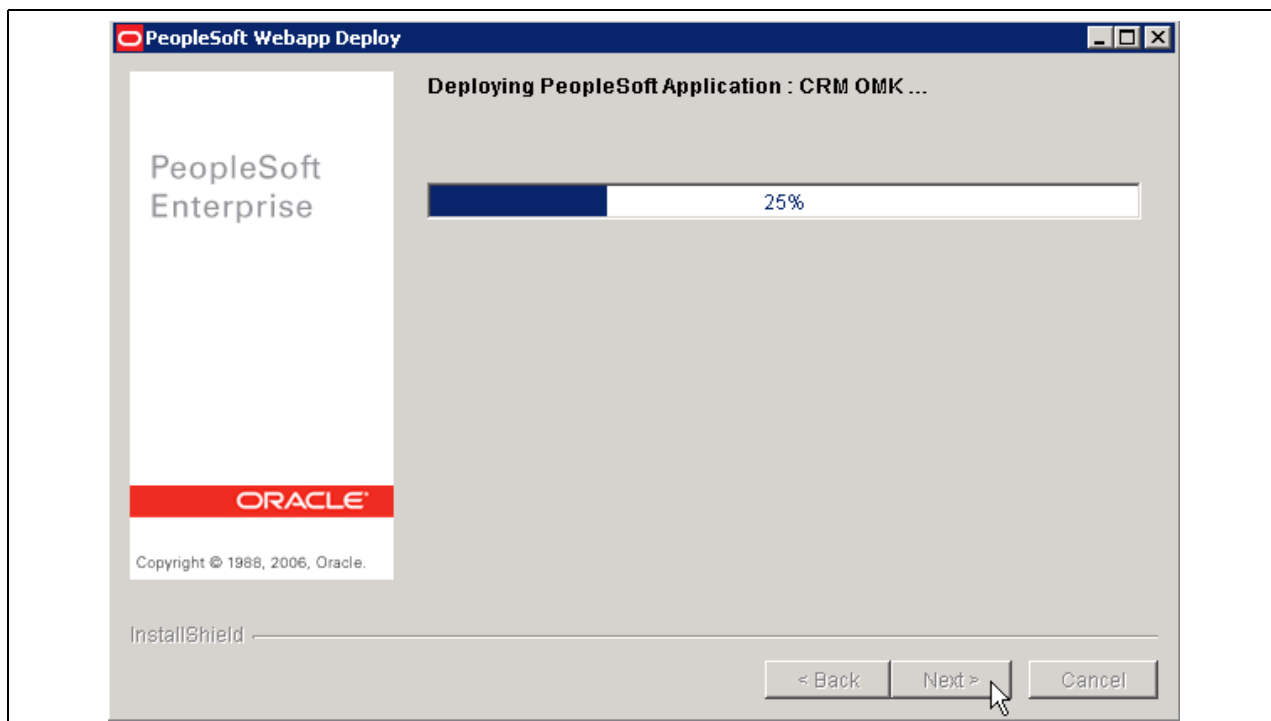
Entering port numbers on PeopleSoft Webapp Deploy window

12. Verify that the information on the confirmation window is correct, and click Next.



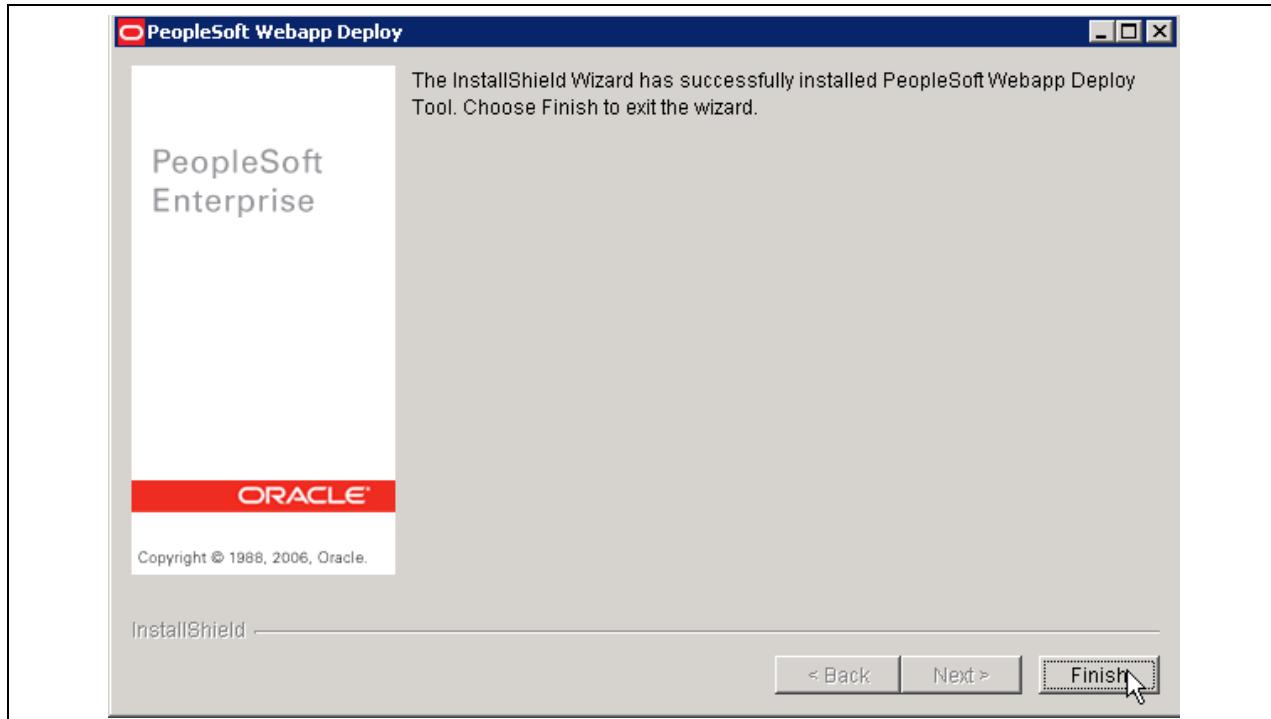
Verifying information on PeopleSoft Webapp Deploy window

A progress window appears.



Progress window for PeopleSoft Webapp Deploy

13. A confirmation window appears when the installation is complete. Click Finish to exit.



Successful installation on the PeopleSoft Webapp Deploy window

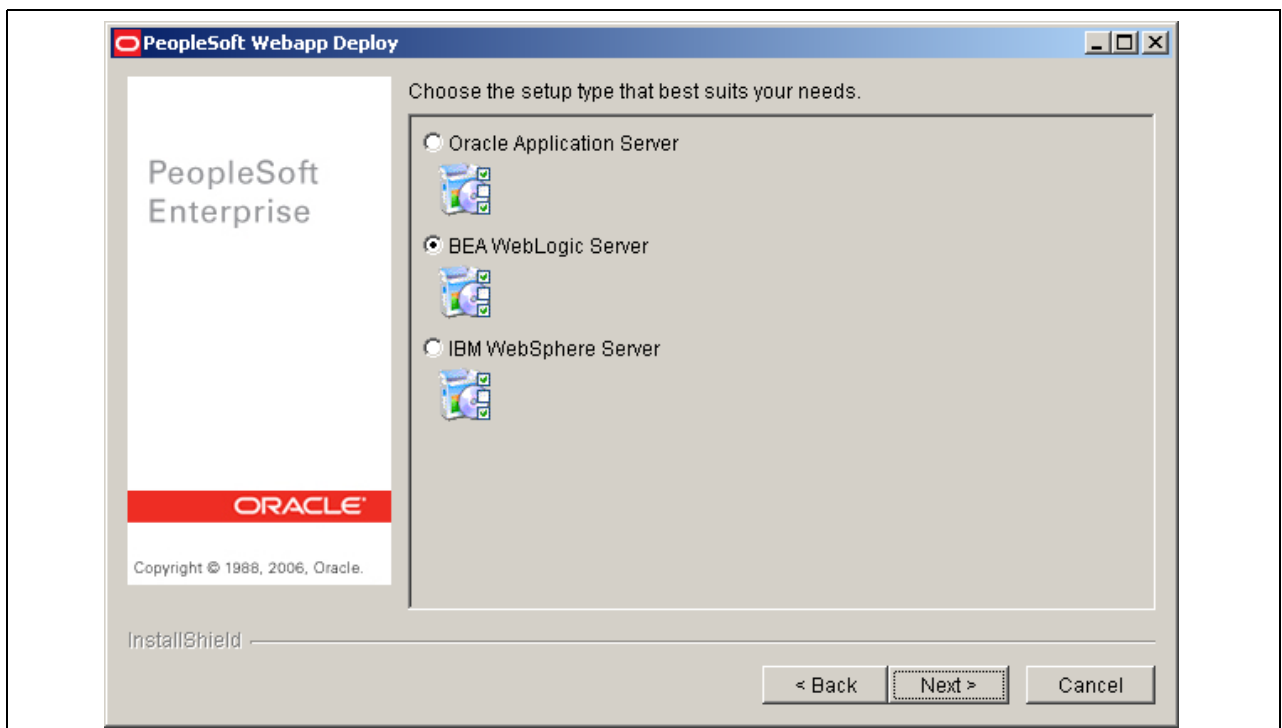
## Task F-2: Installing the Web Application Deployment Tools on WebLogic in GUI Mode

Use these instructions to install the Web Application Deployment Tools on WebLogic in GUI mode.

1. Copy the required Web Applications (EAR) files to <PS\_HOME>/setup/PsMpWebAppDeployInstall/archive.
2. Navigate to <PS\_HOME>/setup/PsMpWebAppDeployInstall.
3. Double-click on setup.exe.

**Note.** If the setup executable fails, and an error message appears saying the JVM directory cannot be found, open a command prompt. Navigate to <PS\_HOME>/setup/PsMpWebAppDeployInstall, and use the command `setup.exe -is:javahome <jre_dir>`, where <jre\_dir> is the location of the JRE files.

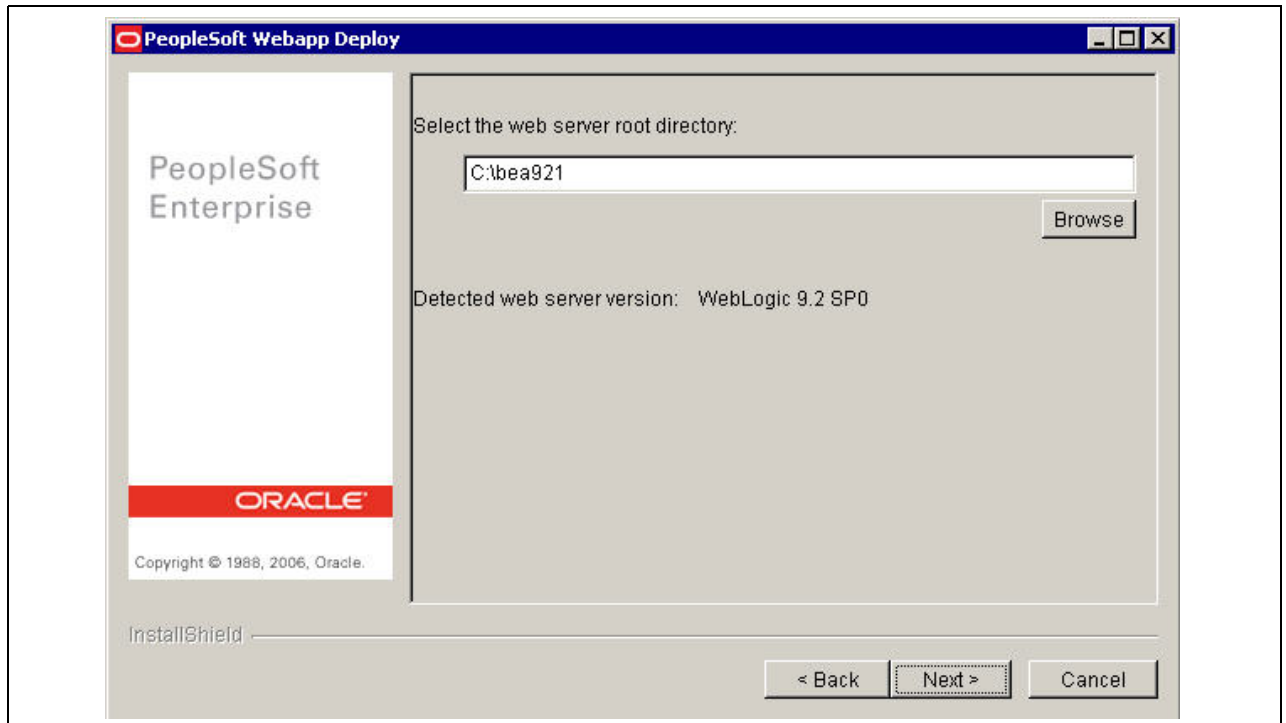
4. Click Next on the Welcome page.
5. Enter the same <PS\_HOME> directory that you specified when you ran the PeopleTools Installer.
6. Select BEA WebLogic Server and click Next.



Selecting BEA WebLogic on the PeopleSoft Webapp Deploy window

7. Specify the root directory where you installed WebLogic, and click Next.





Specifying the WebLogic root directory on the PeopleSoft Webapp Deploy window

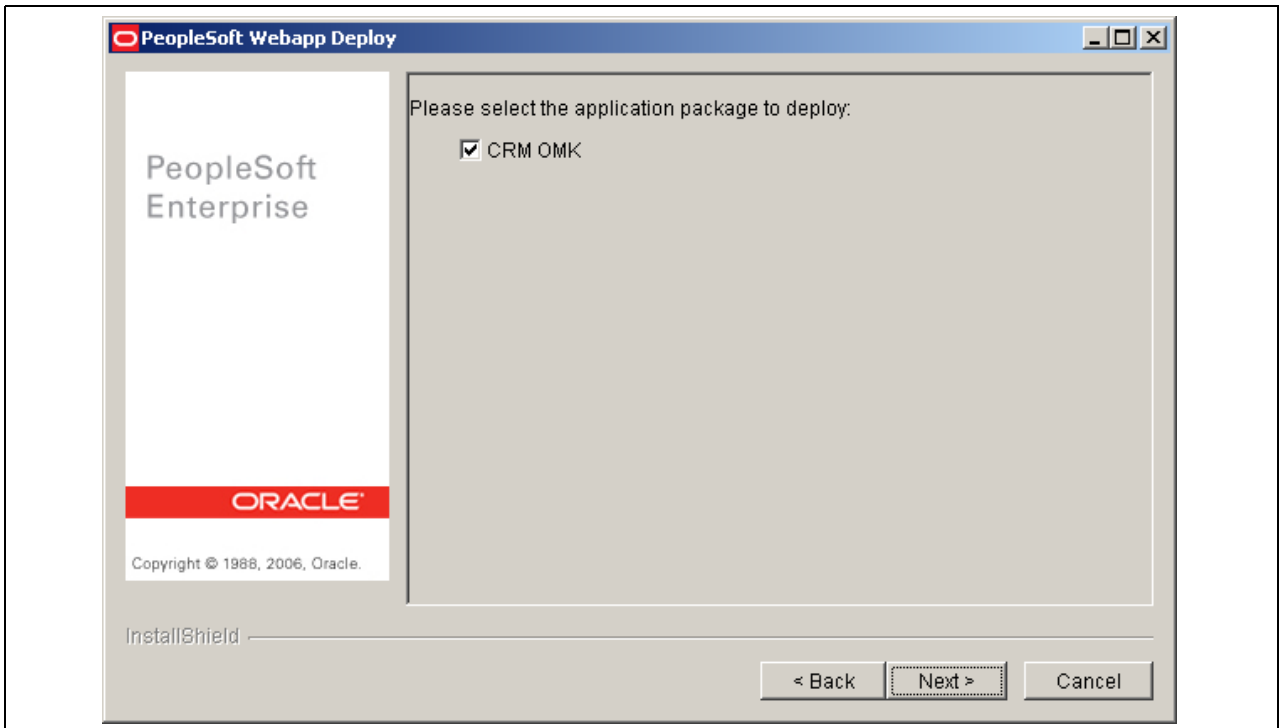
8. Enter the login ID and password for the new domain that you are creating. Click Next to continue.
9. Enter a name for the Web Application Deploy domain, or accept the default name. Use a fully qualified domain name, and do not use an IP address. Click Next to continue.

---

**Important!** The domain that you create for the Web Application Deploy cannot be the same as any existing PeopleSoft Pure Internet Architecture domains. Be sure you do not enter a name that you used for a PeopleSoft Pure Internet Architecture domain.

---

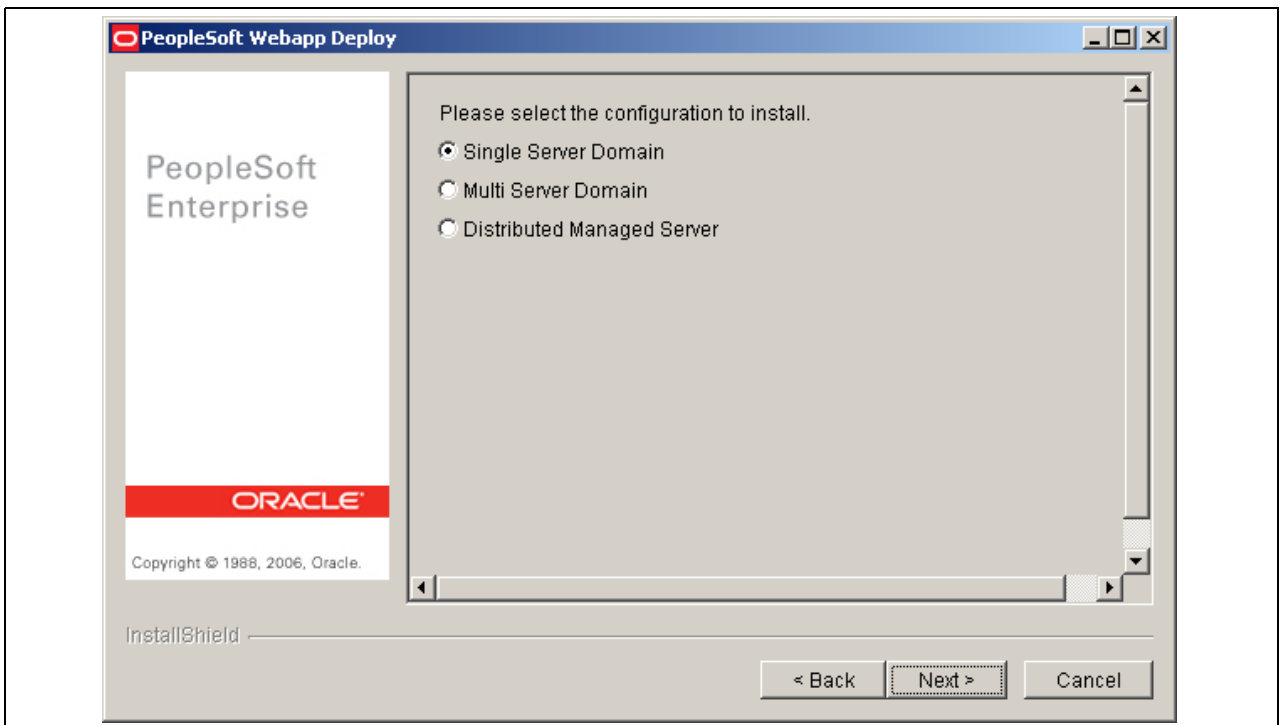
10. The next window lists all of the available application packages (EAR files). Select the packages you want to install. *You must select at least one application package from this list.*



Selecting application packages from the PeopleSoft Webapp Deploy window

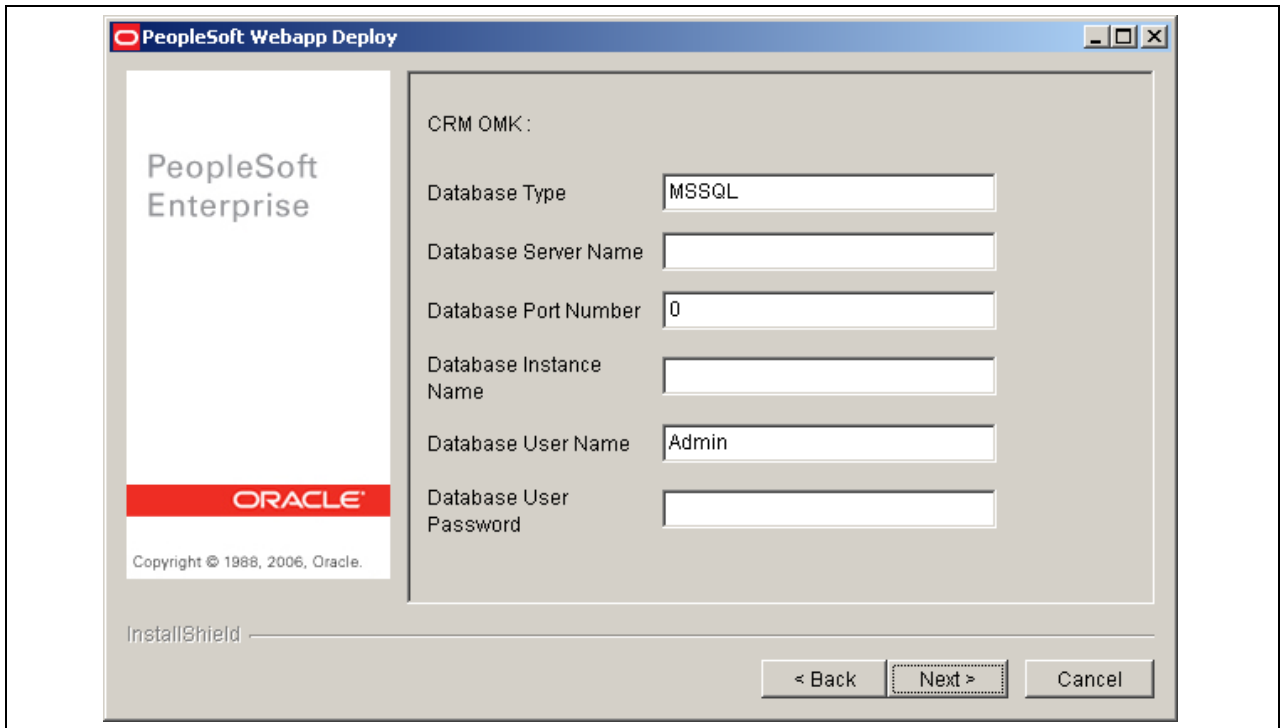
11. Select the type of domain to create from these options:

See “Setting Up the PeopleSoft Pure Internet Architecture in GUI Mode,” Installing the PeopleSoft Pure Internet Architecture in GUI Mode.



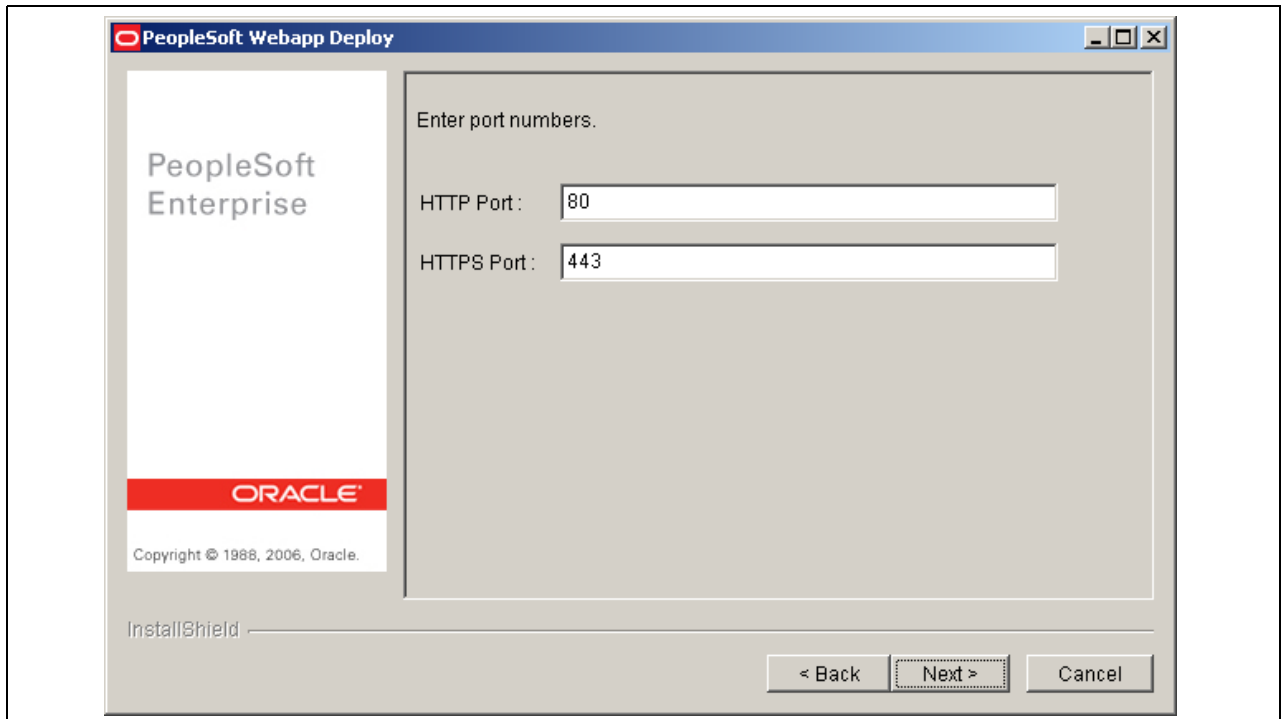
Selecting the domain type from the PeopleSoft Webapp Deploy window

- **Single Server Domain:** This configuration is intended for single users or very small scale, non-production environments.
  - **Multi-Server Domain:** This configuration is intended for a production environment.
  - **Distributed Managed Server:** This option is an extension of the Multi-Server Domain selection and installs the necessary files to boot a managed server. This option requires a Multi-Server installation to be performed to some other location, which will contain the configuration for this managed server.
12. If the application(s) you selected in step 10 requires additional information, a window appears with entry fields for the required information. For example:

The screenshot shows a window titled "PeopleSoft Webapp Deploy". On the left side, there is a vertical panel with the "PeopleSoft Enterprise" logo and the "ORACLE" logo below it, with the text "Copyright © 1988, 2006, Oracle." at the bottom. The main area of the window is titled "CRM OMK:" and contains several labeled text input fields: "Database Type" (containing "MSSQL"), "Database Server Name", "Database Port Number" (containing "0"), "Database Instance Name", "Database User Name" (containing "Admin"), and "Database User Password". At the bottom of the window, there is a progress bar labeled "InstallShield" and three buttons: "< Back", "Next >" (which is highlighted with a dashed border), and "Cancel".

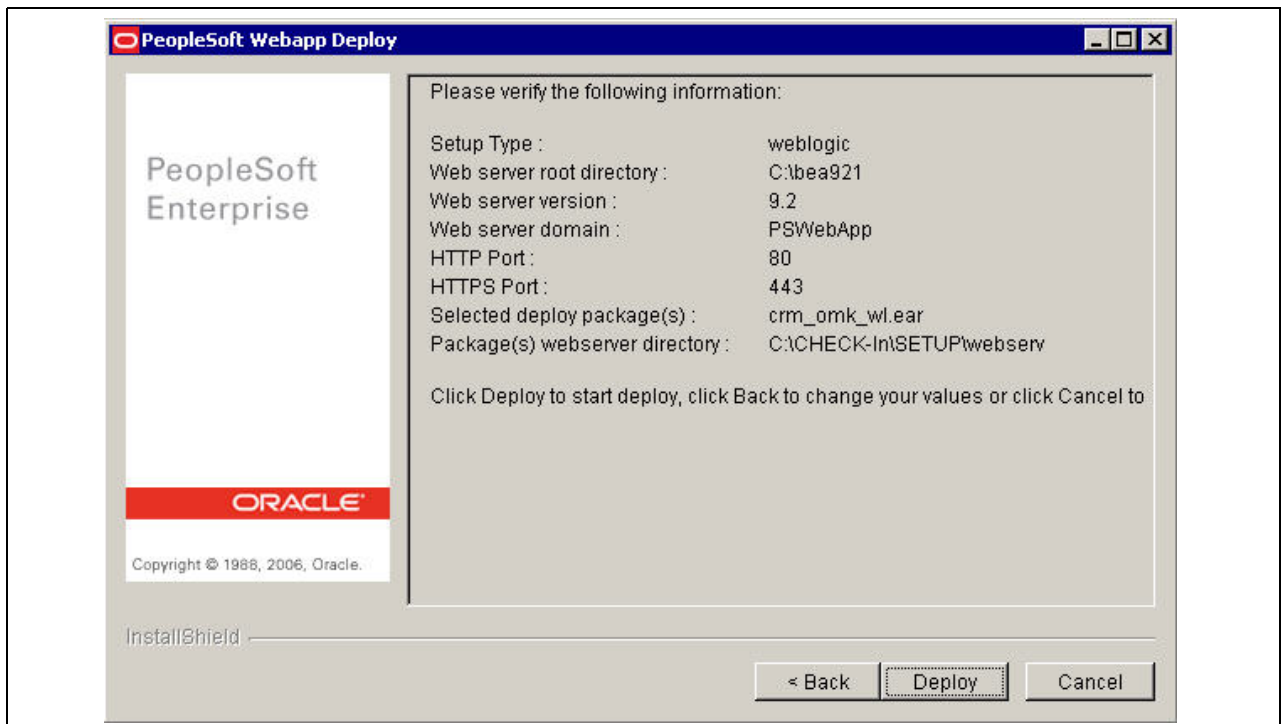
Specifying application information on the PeopleSoft Webapp Deploy window

13. Enter HTTP and HTTPS port numbers. Click Next to continue.



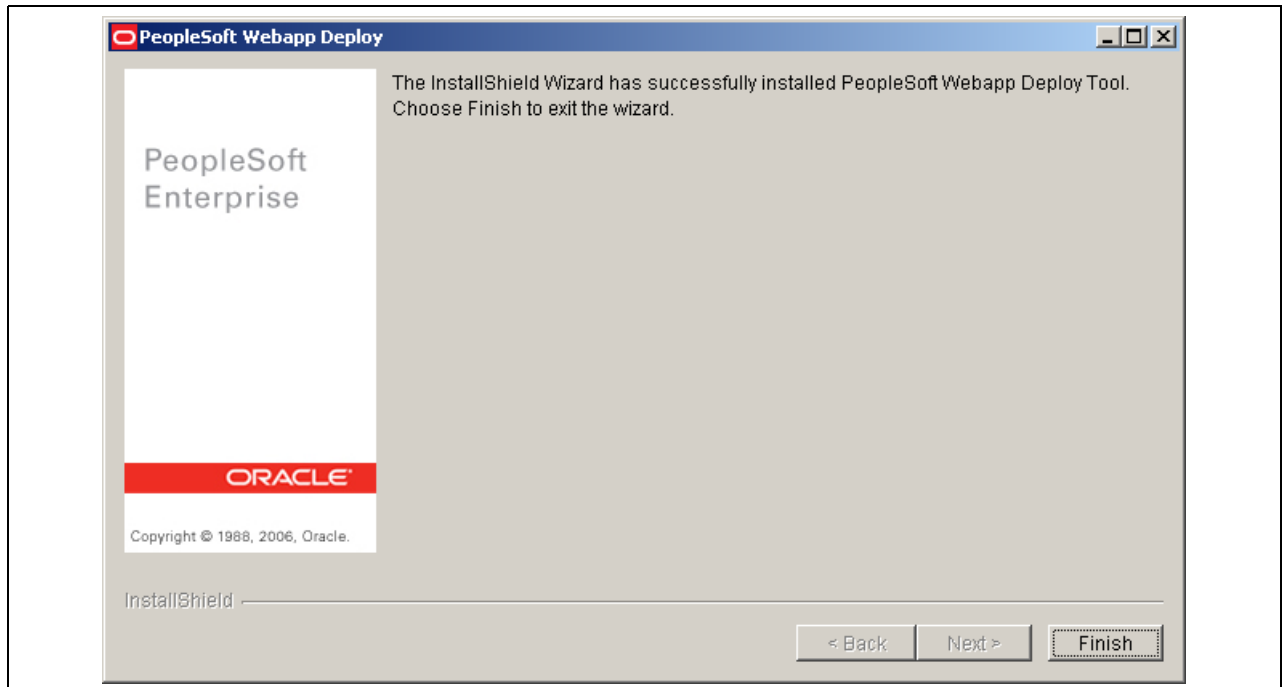
Entering port numbers on the PeopleSoft Webapp Deploy window

14. Verify your installation information on the summary screen that appears. Click Deploy to begin the installation, Back to go back to make changes on an earlier window, or Cancel to exit the installation.



Verifying installation information on the PeopleSoft Webapp Deploy window

15. A confirmation screen appears when the installation completes. Click Finish to exit the install shield wizard.



Final confirmation on PeopleSoft Webapp Deploy window

## Task F-3: Installing the Web Application Deployment Tools on WebSphere in GUI Mode

Use these instructions to install the Web Application Deployment Tools on WebSphere in GUI mode.

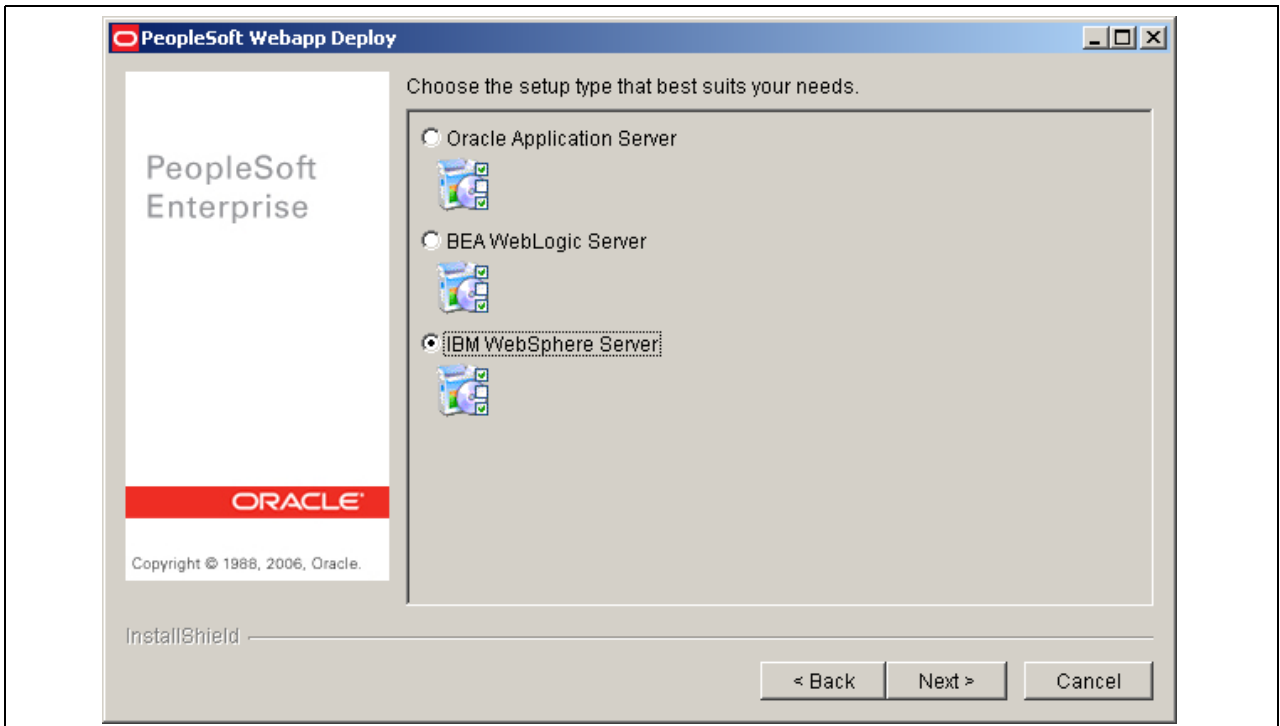
1. Copy the required Web Applications (EAR) files to <PS\_HOME>\setup\PsmPWebAppDeployInstall\archive.
2. Start WebSphere on the server on which you plan to deploy the Web Application Deployment tools. Open a command prompt, navigate to the \bin directory under the root directory where you installed WebSphere (<WAS\_HOME>\bin), and enter:

```
startServer.bat <server_name>
```

3. Navigate to <PS\_HOME>\setup\PsmPWebAppDeployInstall.
4. Double-click on setup.exe.

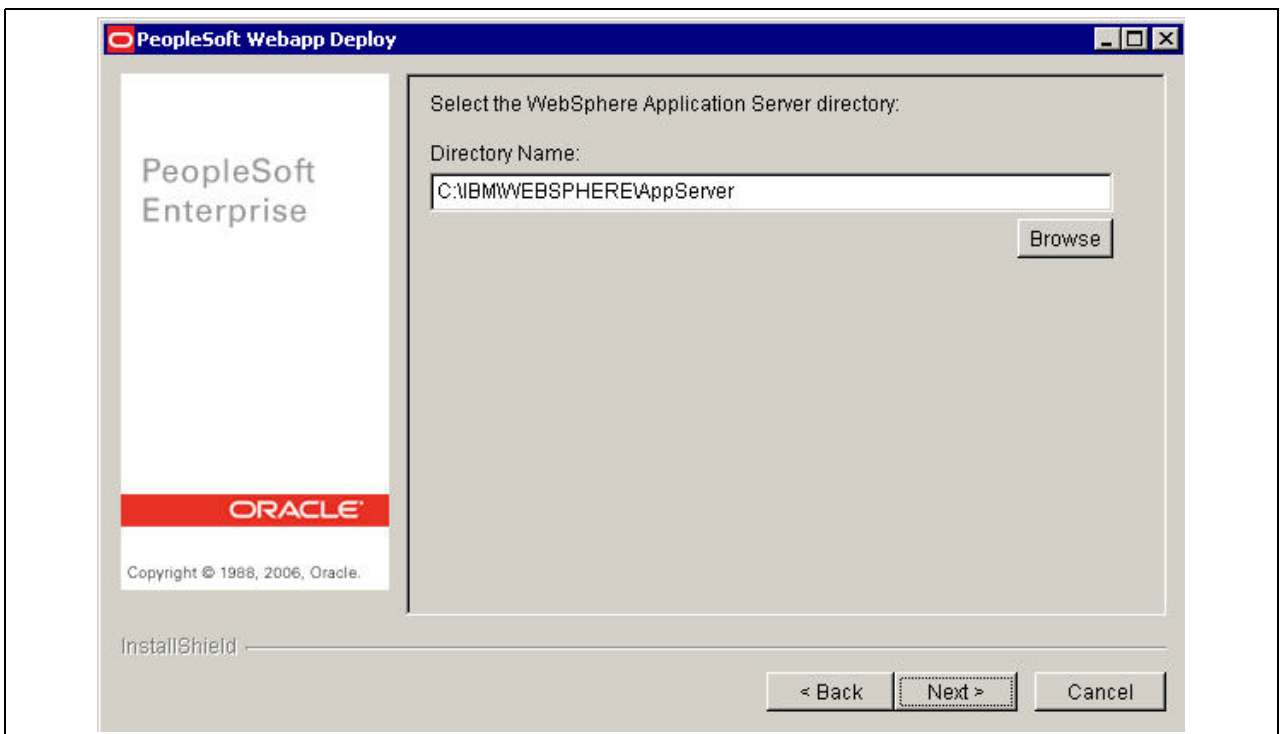
**Note.** If the setup executable fails, and an error message appears saying the JVM directory cannot be found, open a command prompt. Navigate to <PS\_HOME>\setup\PsmPWebAppDeployInstall, and use the command `setup.exe -is:javahome <jre_dir>`, where <jre\_dir> is the location of the JRE files.

5. Click Next on the Welcome page.
6. Enter the same <PS\_HOME> directory that you specified when you ran the PeopleTools Installer.
7. Select IBM WebSphere and click Next.



Selecting IBM WebSphere on the PeopleSoft Webapp Deploy window

8. Specify the root directory where you installed WebSphere, and the cell name, node name and server name of the WebSphere server.



Specifying the WebSphere directory on the PeopleSoft Webapp Deploy window

**Note.** If the web server on which you are installing the Web Application Deployment tools is not up and running, you receive an error message at this point instructing you to start your web server.

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*

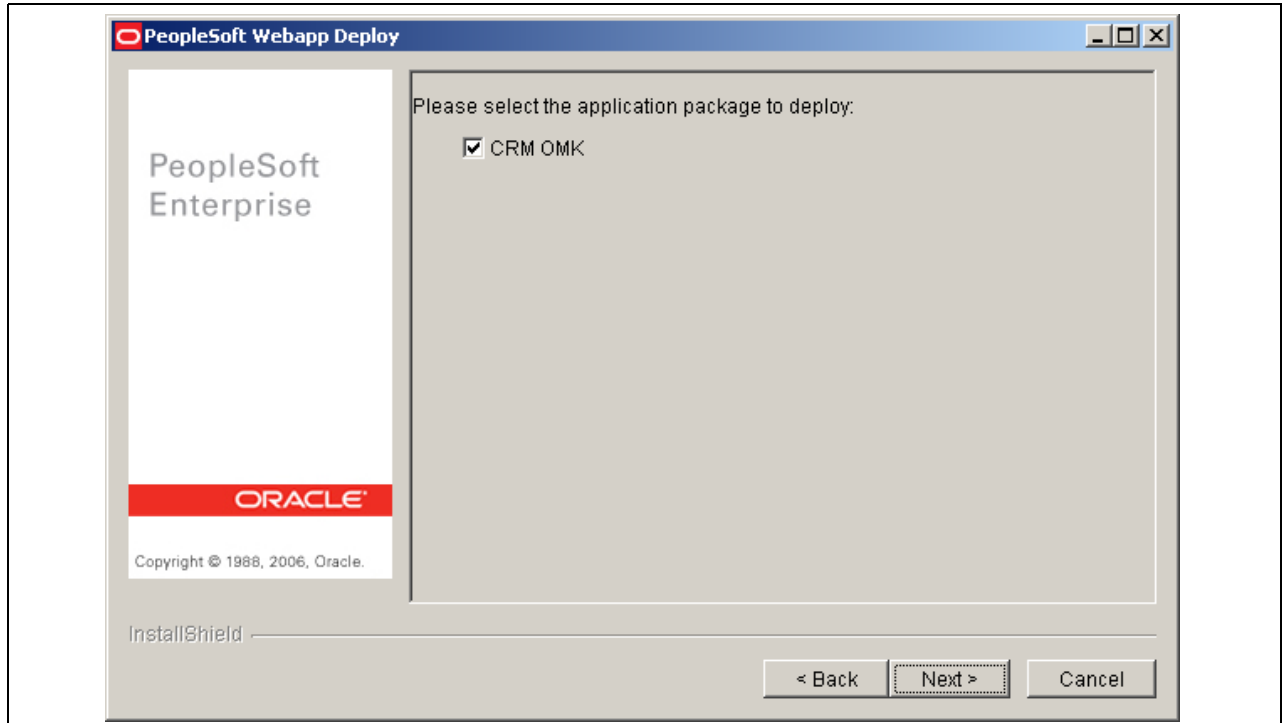
9. Enter a name for the Web Application Deploy domain, or accept the default name. Use a fully qualified domain name, and do not use an IP address. Click Next to continue.

---

**Important!** The domain that you create for the Web Application Deploy cannot be the same as any existing PeopleSoft Pure Internet Architecture domains. Be sure you do not enter a name that you used for a PeopleSoft Pure Internet Architecture domain.

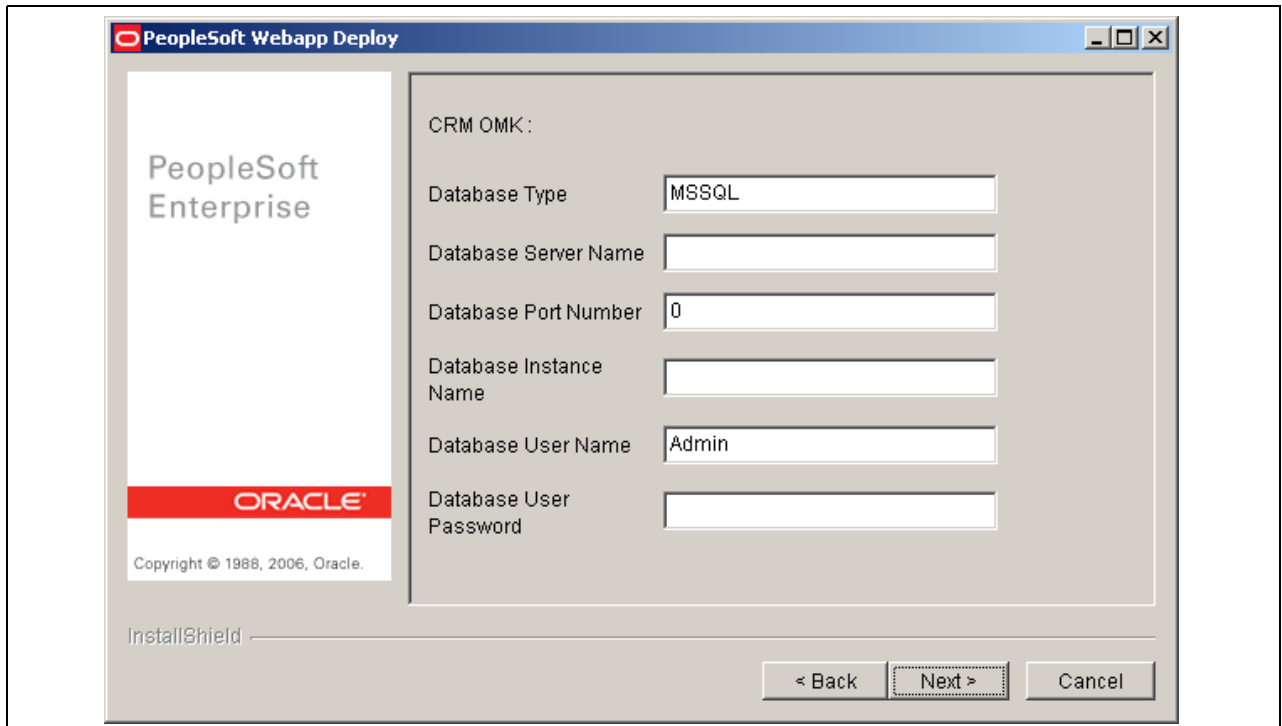
---

10. The next window lists all of the available application packages (EAR files). Select the packages you want to install. *You must select at least one application package from this list.*



Selecting application packages on the PeopleSoft Webapp Deploy window

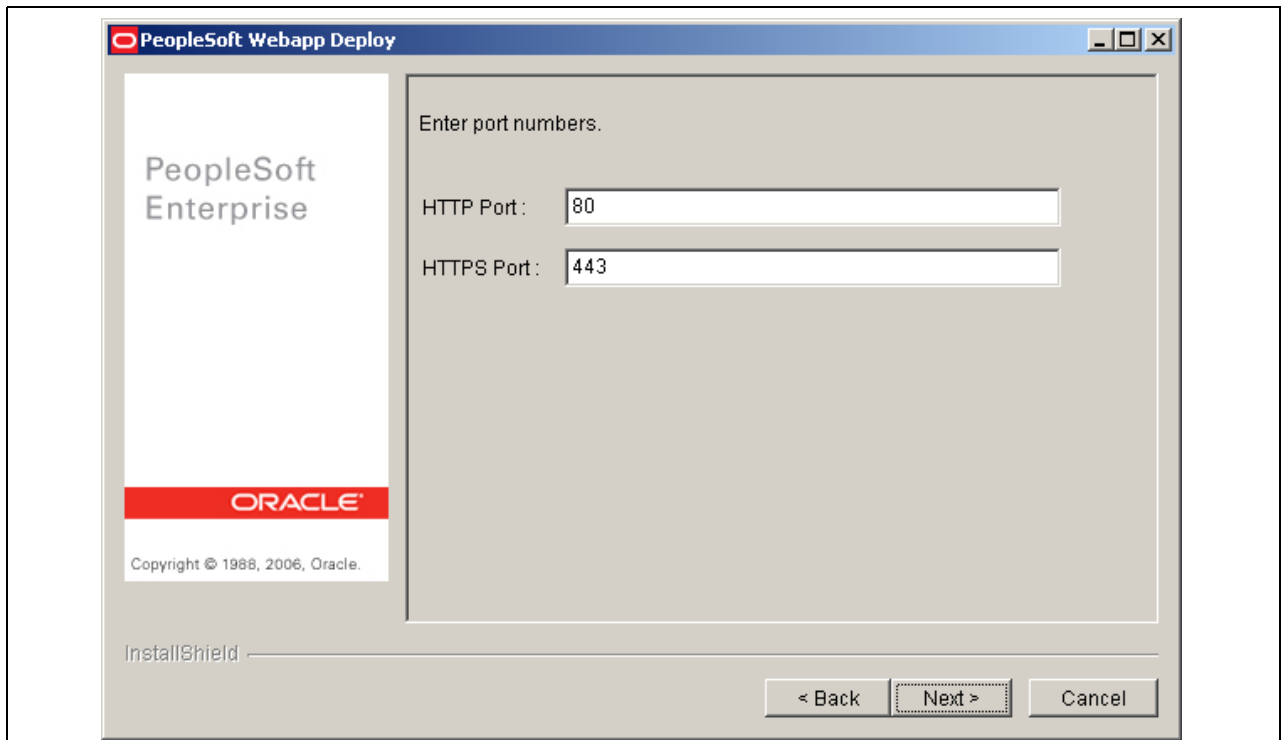
11. If the application(s) you selected in step 10 requires additional information, a window appears with entry fields for the required information. For example:



The screenshot shows the 'PeopleSoft Webapp Deploy' window. On the left is a sidebar with the 'PeopleSoft Enterprise' logo and the 'ORACLE' logo. The main area is titled 'CRM OMK:' and contains several input fields: 'Database Type' (MSSQL), 'Database Server Name' (empty), 'Database Port Number' (0), 'Database Instance Name' (empty), 'Database User Name' (Admin), and 'Database User Password' (empty). At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'. The 'InstallShield' logo is visible in the bottom left corner of the main area.

Specifying application information on the PeopleSoft Webapp Deploy window

12. Enter HTTP and HTTPS port numbers. Click Next to continue.

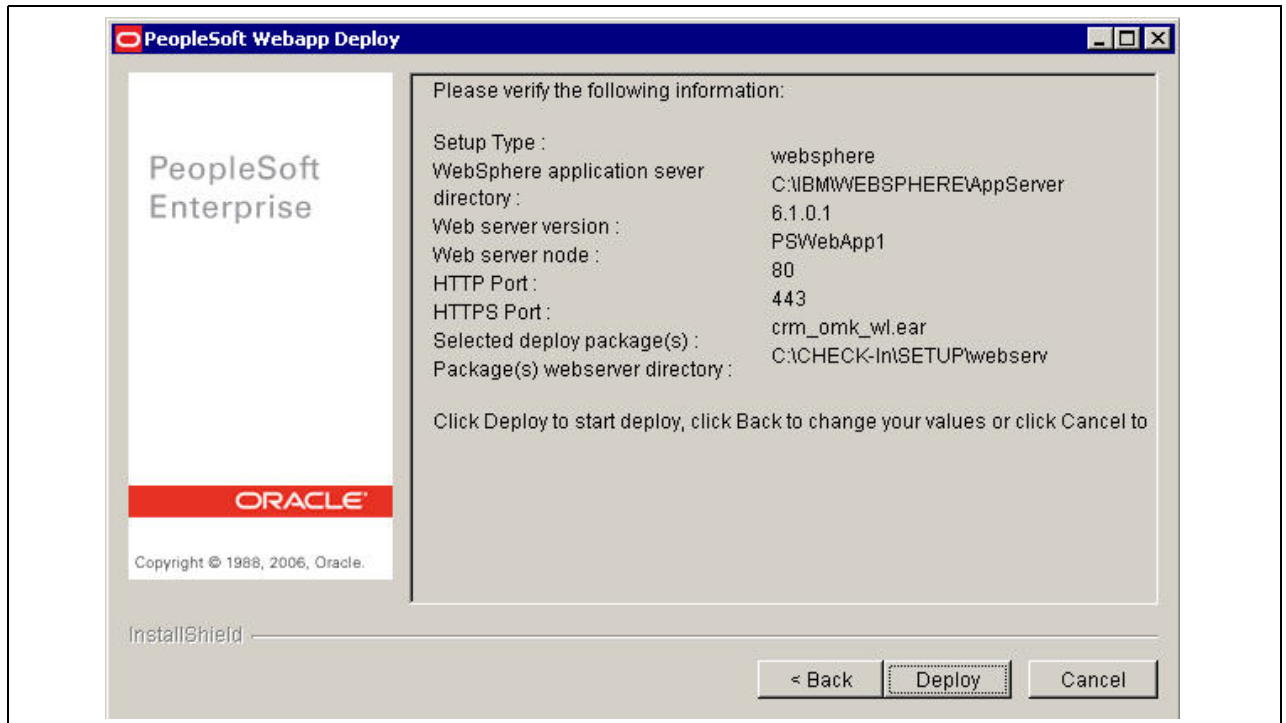


The screenshot shows the 'PeopleSoft Webapp Deploy' window at the 'Enter port numbers.' step. The sidebar is the same as in the previous window. The main area has the title 'Enter port numbers.' and two input fields: 'HTTP Port:' (80) and 'HTTPS Port:' (443). At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'. The 'InstallShield' logo is visible in the bottom left corner of the main area.

Entering port numbers on the PeopleSoft Webapp Deploy window for WebSphere

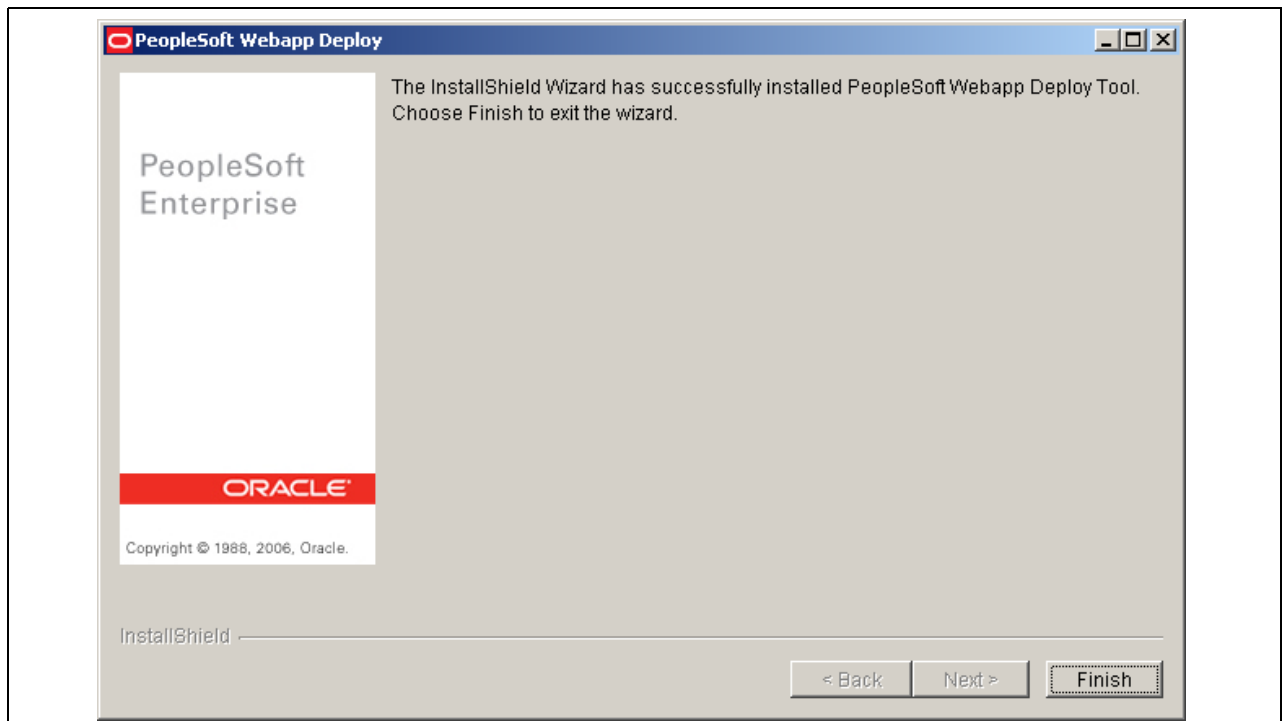
13. Verify your installation information on the summary screen that appears. Click Deploy to begin the installation, Back to go back to make changes on an earlier window, or Cancel to exit the installation.





Verifying installation information on the PeopleSoft Webapp Deploy

14. A window appears with a progress indicator. A confirmation screen appears when the installation completes. Click Finish to exit the install shield wizard.



Confirming installation on the PeopleSoft Webapp Deploy window

## Task F-4: Installing the Web Application Deployment Tools on Oracle Application Server in Console Mode

To install the Web Application Deployment Tools on OAS in console mode:

---

**Note.** The console mode installation is typically used on UNIX platforms.

---

1. Copy the required Web Applications (EAR) files to <PS\_HOME>/setup/PsMpWebAppDeployInstall/archive.
2. Set up the PeopleSoft environment as follows:

```
cd <PS_HOME>
../psconfig.sh
```

3. To run the installer:

```
cd <PS_HOME>/setup/PsMpWebAppDeployInstall
setup.<OS> -is:javaconsole -console [-is:javahome <jre 1.5.0>]
```

- Use the same platform-specific extension for the setup executable as you used for the PeopleSoft Installer.

See “Using the PeopleSoft Installer,” Running the PeopleSoft Installer.

- Use the optional flag `-is:javahome<jre 1.5.0>` if you installed the JRE/JDK files in a directory that is different than the vendor-defined JRE search path. For example, to run on a HP-UX platform and use the JRE that PeopleSoft supplies with PeopleTools, use the command `setup.hp -console -is:javahome <PS_HOME>/jre`.

4. You see a welcome message. Enter *I* to continue.

```
Welcome to the InstallShield Wizard for PeopleSoft Webapp Deploy Tool.
```

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

```
Note: If installing onto a BEA WebLogic Server, make sure to shutdown any⇒
running web servers to avoid web server corruption.
```

```
Select Next to continue or Cancel to exit.
```

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

5. Choose the <PS\_HOME> directory that you specified when you installed PeopleTools. Enter *I* to continue.

```
Choose the directory where you installed PeopleSoft, commonly known as "PS_⇒
HOME":
```

```
Please specify a directory name or press Enter [/opt/PS_HOME]
```

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

6. Press ENTER to select the default, Oracle Application Server, at the following prompt, and then enter *I* to continue.

```
Choose the setup type that best suits your needs.
```

- [X] 1 - Oracle Application Server  
[ ] 2 - BEA WebLogic Server  
[ ] 3 - IBM WebSphere Server  
To select an item enter its number, or 0 when you are finished: [0]  
Press 1 for Next, 2 for Previous, 3 to Cancel or 5 to Redisplay [1]
7. Enter the directory where you installed the OAS software, and press ENTER to continue at the following prompt.
- Select the web server root directory:  
Please specify a directory name or press ENTER [/home/OraHome\_1]
8. Enter a name for the web application, or accept the default name.
- Enter application name or click Next to select default:
- [CRMOLM]
- A New OC4J component will be created using the user-specified application name.
9. The next prompt lists all of the available application packages (EAR files). Enter the numbers beside the packages you want to install. *You must select at least one application package from this list.*
- Please select the application package to deploy:
- [X] 1 - CRM Package  
[ ] 2 - Financial Package
- To select an item enter its number, or 0 when you are finished [0]:
10. If the application(s) you selected in step 9 requires additional information, supply the necessary information at the next prompt. For example:
- CRM OMK :
- Database Type  
[MSSQL]
- Database Server Name  
[]
- Database Port Number  
[0]
- Database Instance Name  
[]
- Database User Name  
[Admin]
- Database User Password  
[]

11. Enter HTTP and HTTPS port numbers.

---

**Note.** Review the reserved port numbers for OAS in the file <OAS\_HOME>/install/portlist.ini and enter a different port number here.

---

Enter port numbers.

HTTP Port : [80] 8091

HTTPS Port : [443] 4431

12. Verify your installation information on the next prompt and press ENTER to begin the installation. An indicator shows your installation progress.

Please verify the following information:

Setup Type : OAS

Web server root directory : /home/OraHome\_1

Web server version : 10.1.2

PeopleSoft App Name : CRMOLM

HTTP Port : 8091

HTTPS Port : 4431

Selected deploy package(s) : crm\_omk\_wl.ear

13. A confirmation screen appears when the installation completes. Click Finish to exit the install shield wizard.

---

## Task F-5: Installing the Web Application Deployment Tools on WebLogic in Console Mode

Use these instructions to install the Web Application Deployment Tools on WebLogic in console mode.

---

**Note.** The console mode installation is typically used on UNIX platforms.

---

1. Copy the required Web Applications (EAR) files to <PS\_HOME>/setup/PsMpWebAppDeployInstall/archive.
2. Set up the PeopleSoft environment as follows:  

```
cd <PS_HOME>
../psconfig.sh
```
3. To run the installer:

```
cd <PS_HOME>/setup/PsMpWebAppDeployInstall
setup.<OS> -is:javaconsole -console [-is:javahome <jre 1.5.0>]
```

- Use the same platform-specific extension for the setup executable as you used for the PeopleSoft Installer.

See “Using the PeopleSoft Installer,” Running the PeopleSoft Installer.

- Use the optional flag `-is:javahome<jre 1.5.0>` if you installed the JRE/JDK files in a directory that is different than the vendor-defined JRE search path. For example, to run on a HP-UX platform and use the JRE that PeopleSoft supplies with PeopleTools, use the command `setup.hp -console -is:javahome <PS_HOME>/jre`.

4. You see a welcome message. Enter */* to continue.

Welcome to the InstallShield Wizard for PeopleSoft Webapp Deploy Tool.

Using the InstallShield Wizard you will deploy PeopleSoft Application(s) on⇒  
your computer.

Note: If installing onto a BEA WebLogic Server, make sure to shutdown any⇒  
running web servers to avoid web server corruption.

Select Next to continue or Cancel to exit.

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

5. Choose the `<PS_HOME>` directory that you specified when you installed PeopleTools. Enter */* to continue.

Choose the directory where you installed PeopleSoft, commonly known as "PS\_⇒  
HOME":

Please specify a directory name or press Enter [/opt/PS\_HOME]

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

6. Enter 2 to select BEA WebLogic Server, at the following prompt, and then enter */* to continue.

Choose the setup type that best suits your needs.

[X] 1 - Oracle Application Server

[ ] 2 - BEA WebLogic Server

[ ] 3 - IBM WebSphere Server

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

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

7. Enter the directory where you installed WebLogic, and press ENTER to continue at the following prompt.

Select the web server root directory:

Please specify a directory name or press ENTER [/opt/bea\_ps]

---

**Note.** You receive an error message if the correct WebLogic version is not found in the directory you enter.

---

8. Enter a name for the Web Application Deploy domain, or accept the default name. Use a fully qualified domain name, and do not use an IP address.

Enter domain name or click Next to select default:

[PSWebApp]

---

**Important!** The domain that you create for the Web Application Deploy cannot be the same as any existing PeopleSoft Pure Internet Architecture domains. Be sure you do not enter a name that you used for a PeopleSoft Pure Internet Architecture domain.

---

9. Enter the administrator login and password for your WebLogic domain, and press ENTER to continue.

Please enter the administrator login and password for WebLogic domain.

Login ID:

[system]

Password:

[password]

Re-type Password:

[password]

10. The next prompt lists all of the available application packages (EAR files). Enter the numbers beside the packages you want to install. *You must select at least one application package from this list.*

Please select the application package to deploy:

```
[X] 1 - CRM Package
[] 2 - Financial Package
```

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

11. Select the type of domain to create—single server, multi server, or distributed managed server.

See “Setting Up the PeopleSoft Pure Internet Architecture in Console Mode,” Installing the PeopleSoft Pure Internet Architecture in Console Mode.

Please select the configuration to install.

```
[X] 1 - Single Server Domain
[] 2 - Multi Server Domain
[] 3 - Distributed Managed Server
```

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

- Single Server Domain: This configuration is intended for single user or very small scale, non-production environments.
- Multi-Server Domain: This configuration is intended for a production environment.

- Distributed Managed Server: This option is an extension of the Multi-Server Domain selection and installs the necessary files to boot a managed server. This option requires a Multi Server installation to be performed to some other location, which will contain the configuration for this managed server.
12. If the application(s) you selected in step 10 requires additional information, supply the necessary information at the next prompt. For example:

CRM OMK :

Database Type  
[MSSQL]

Database Server Name  
[]

Database Port Number  
[0]

Database Instance Name  
[]

Database User Name  
[Admin]

Database User Password  
[]

13. Enter HTTP and HTTPS port numbers.

Enter port numbers.

HTTP Port : [80] 8091

HTTPS Port : [443] 4431

14. Verify your installation information on the next prompt and press ENTER to begin the installation. An indicator shows your installation progress.

Please verify the following information:

Setup Type : weblogic

Web server root directory : /opt/bea\_ps

Web server version : 8.1

Web server domain : PSWebApp

HTTP Port : 8091

HTTPS Port : 4431

Selected deploy package(s) : CRM Package.ear

Package(s) webserver directory : /opt/PS\_HOME/webserv

15. After the installation is complete, you must deploy the Web Application Deploy tools. Use the following commands:

```
cd <PS_HOME>/webserv/<domain_name>
startPSWEBAPPS.sh
```

For <domain\_name>, use the name you entered in step 8.

---

**Note.** You can choose to deploy at a later time using the same commands.

---

## Task F-6: Installing the Web Application Deployment Tools on WebSphere in Console Mode

Use these instructions to install the Web Application Deployment Tools on WebSphere in console mode.

---

**Note.** The console mode installation is typically used on UNIX platforms.

---

1. Copy the required Web Applications (EAR) files to <PS\_HOME>/setup/PsMpWebAppDeployInstall/archive.
2. Set up the PeopleSoft environment using the following commands:

```
cd <PS_HOME>
../psconfig.sh
```

3. Start WebSphere on the server on which you plan to deploy the Web Application Deployment tools. Navigate to the bin directory under the directory where you installed WebSphere, <WAS\_HOME>. Use the following commands:

```
cd <WAS_HOME>/bin
startServer.sh <server_name>
```

4. To run the installer:

```
cd <PS_HOME>/setup/PsMpWebAppDeployInstall
setup.<platform> -console [-is:javahome<jre 1.5.0>]
```

- Use the same platform-specific extension for the setup executable as you used for the PeopleSoft Installer.

See “Using the PeopleSoft Installer,” Running the PeopleSoft Installer.

- Use the optional flag `-is:javahome<jre 1.5.0>` if you installed the JRE/JDK files in a directory that is different than the vendor-defined JRE search path. For example, to run on a HP-UX platform and use the JRE that PeopleSoft supplies with PeopleTools, use the command `setup.hp -console -is:javahome <PS_HOME>/jre`.

5. You see a Welcome message. Enter *I* to continue.

```
Welcome to the InstallShield Wizard for PeopleSoft Webapp Deploy Tool.
Using the InstallShield Wizard you will deploy PeopleSoft Application(s) onyour=>
```



computer.

Note: If installing onto a BEA WebLogic Server, make sure to shutdown any⇒  
running web servers to avoid web server corruption.

Select Next to continue or Cancel to exit.

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

6. Choose the same <PS\_HOME> directory that you specified when you ran the PeopleTools Installer.

Choose the directory where you installed PeopleSoft, commonly known as "PS\_⇒  
HOME":

Please specify a directory name or press Enter [/opt/PS\_HOME]

7. Enter 3, to select the IBM WebSphere Server, at the following prompt:

Choose the setup type that best suits your needs.

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

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

8. Enter the root directory where you installed WebSphere at the following prompt, and press ENTER to continue:

Select the WebSphere Server directory:

Directory Name:

Please specify a directory name or press Enter [/opt/webserv]

---

**Note.** If the web server on which you are installing the Web Application Deployment tools is not up and running, you receive an error message at this point instructing you to start your web server.

---

See *Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration*.

9. At the next prompts, enter a cell name, node name, and server name.
10. Enter a name for the Web Application Deploy domain, or accept the default name. Use a fully qualified domain name, and do not use an IP address. Press / to continue.

Enter domain name or click Next to select default:

[PSWebApp]

---

**Important!** The domain that you create for the Web Application Deploy cannot be the same as any existing PeopleSoft Pure Internet Architecture domains. Be sure you do not enter a name that you used for a PeopleSoft Pure Internet Architecture domain.

---

11. The next prompt lists all of the available application packages (EAR files). Enter the number corresponding to the packages you want to install. *You must select at least one application package from this list.*

Please select the application package to deploy:

```
[X] 1 - CRM Package
[] 2 - Financial Package
```

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

12. If the application(s) you selected in the previous step requires additional information, supply the necessary information at the next prompt. For example:

CRM OMK :

Database Type  
[MSSQL]

Database Server Name  
[]

Database Port Number  
[0]

Database Instance Name  
[]

Database User Name  
[Admin]

Database User Password  
[]

13. Enter HTTP and HTTPS port numbers at the following prompt. Press */* to continue.

Enter port numbers.

HTTP Port: [80] 8091

HTTPS Port: [443] 4431

14. Verify your installation information at the next prompt and press ENTER to begin the installation. An indicator shows your installation progress.
15. A confirmation screen appears when the installation completes. Click Finish to exit the install shield wizard.
16. After the installation is complete, you must stop and start the WebSphere server. Use the following commands:

```
cd <WAS_HOME>/bin
../stopServer.sh <server_name>
../startServer.sh <server_name>
```

For <server\_name>, use the name of the WebSphere server you used in step 3.

---

## Task F-7: Testing and Troubleshooting the Web Application Deployment

Check the log file for any problems encountered during installation. The log file is saved in the following locations:

- If you installed on OAS, the log files are found in <OAS\_HOME>/j2ee/home/webappdeploy\_install.log.
- If you installed on WebLogic, the log file is found in <PS\_HOME>/webserve/<domain\_name>logs/\*.log
- If you installed on WebSphere, look in <WAS\_HOME>/appserver/log/<server\_name>\*.log

If you need to start or stop OAS, WebLogic, or WebSphere, use the commands given in the chapter on installing the PeopleSoft Pure Internet Architecture.

See “Setting Up the PeopleSoft Pure Internet Architecture (in GUI Mode or Console Mode),” Testing the PeopleSoft Pure Internet Architecture Installation.



## APPENDIX G

# Upgrading to Microsoft SQL Server 2005

This appendix discusses:

- Understanding the Upgrade to Microsoft SQL Server 2005
- Preparing to Migrate
- Upgrading a PeopleSoft Database from Microsoft SQL Server 2000 to Microsoft SQL Server 2005
- Setting Up the Migrated Database

---

## Understanding the Upgrade to Microsoft SQL Server 2005

This document will provide pointers when migrating a PeopleSoft application database from SQL Server 2000 to SQL Server 2005. The following instructions are not intended as a replacement to the Microsoft SQL Server Books Online documentation. Make sure you read and understand the migration instructions and process provided in the SQL Server Books Online (Upgrading to SQL Server 2005) before attempting any database migration from SQL Server 2000 to SQL Server 2005. Another tool that may help on your migration efforts is the “Upgrade Advisor Wizard” provided by Microsoft.

In addition, please read the appendix “Installing Microsoft SQL Server 2005” which provides information on installing Microsoft SQL Server 2005 for PeopleSoft applications. Also refer to SQL Server 2005 Books Online, [support.microsoft.com](http://support.microsoft.com) or Microsoft support services for further details about Microsoft SQL Server 2005.

---

**Note.** PeopleTools 8.48 is the minimum PeopleTools release to support SQL Server 2005. Use these instructions if you installed your PeopleSoft application on PeopleTools 8.48 using Microsoft SQL Server 2000, and want to migrate the PeopleSoft database to Microsoft SQL Server 2005.

---

---

## Task G-1: Preparing to Migrate

Before beginning the migration to Microsoft SQL Server 2005, you must:

- Back up your database files.

Please back up your existing Microsoft SQL Server database. After doing so, ensure that your backup was successful by restoring or loading the database into a “dummy” database. You may also want to back up the instance database files to have them ready for restore if necessary.

- Verify database integrity.

You need to verify the integrity of your database and repair any problems before attempting a migration. Commands like DBCC CHECKDB are available to perform this task.

---

## Task G-2: Upgrading a PeopleSoft Database from Microsoft SQL Server 2000 to Microsoft SQL Server 2005

If you are currently using Microsoft SQL Server 2000 and would like to upgrade your PeopleSoft database to Microsoft SQL Server 2005 you have several alternatives. Select the one which best suits your environment necessities. The following are only suggestions of possible alternatives to accomplish this task.

- Restore a backup.

To upgrade a Microsoft SQL Server 2000 database it is possible to back it up and restore it in Microsoft SQL Server 2005. This will automatically upgrade the database to Microsoft SQL Server 2005.

---

**Note.** The SQL Server 2000 environment must be running at least with the service pack SP3a.

---

- Detach and attach a database.

Another way to upgrade your PeopleSoft database and probably the fastest is detaching the database from SQL Server 2000 and attaching it to SQL Server 2005. To accomplish this, run `sp_detach_db` in Microsoft SQL Server 2000, and then `sp_attach_db` in Microsoft SQL Server 2005. This procedure will automatically upgrade your database to Microsoft SQL Server 2005.

---

**Note.** The SQL Server 2000 environment must be running at least with the service pack SP3a.

---

- Copy Database Wizard.

You can also upgrade to Microsoft SQL Server 2005 using Microsoft SQL Server 2005 Copy Database Wizard. Please consult the Microsoft Books Online for details on how to use the tool.

- Use PeopleSoft Data Mover.

Another alternative to migrate your database could be using PeopleTools. You can use Data Mover to migrate data of the entire database. This could be accomplished by exporting all the tables in the database to a Data Mover file. Please keep in mind that this could be the slowest procedure of all those mentioned in this section; however there are specific scenarios where using Data Mover could be the best choice.

See “Creating a Database Manually.”

See *Enterprise PeopleTools 8.49 PeopleBook: Data Management*.

---

## Task G-3: Setting Up the Migrated Database

No matter which approach you decide to use, please read and observe the follow recommendations in your migrated PeopleTools environment.

- Set up the appropriate Compatibility Level.

According to the Microsoft SQL Server Book Online: “When a database is upgraded to SQL Server 2005 from any earlier version of SQL Server, the database retains its existing compatibility level.” For this reason it is very important to remember to modify the compatibility level of your PeopleSoft database to 90 right after verifying the database integrity after upgrade. PeopleTools will not recognize the compatibility level used in your database and it will assume the appropriate compatibility mode was selected. Utilizing a different compatibility mode may cause unexpected behavior in the product.

- Verify database integrity.

We recommend that you verify the integrity of your database and repair any problems that may occur after migrating your database. Make sure to run DBCC CHECKDB at the upgraded database.

Right after migrating the database the compatibility mode will be 80. If you change the value to 90 before verifying the database integrity you may get warnings like the following at the DBCC CHECKDB output:

*“Warning: Index "<INDEXNAME>" on table "dbo"."<TABLENAME>" might be corrupted because it references computed column "MSSCONCATCOL" containing a non-deterministic conversion from string to date. Run DBCC CHECKTABLE to verify index. Consider using explicit CONVERT with deterministic date style such as 121. Computed column indexes referencing non-deterministic expressions can't be created in 90 compatibility mode. See Books Online topic "Creating Indexes on Computed Columns" for more information.”*

The message above is expected because the index for the computed column MSSCONCATCOL uses a conversion that is not supported anymore on SQL 2005. This problem will be fixed once you recreate the index with the PeopleTools 8.49 code, which includes a new implementation of the index. If you are upgrading an Application or your PeopleTools version you may need to do this anyway; if not, take note of the indexes reported and rebuild them using Application Designer.

- Update database statistics.

The Microsoft SQL Server Books Online recommends updating your database statistics to help optimize query performance. Use the sp\_updatestats stored procedure to update statistics in user-defined tables in SQL Server 2005 databases. Make sure the compatibility mode is set to 90 before running this command.

For a more elaborate procedure you can try the following. Use a script to run the following commands for all tables in your PeopleSoft database:

```
UPDATE STATISTICS <PS_TABLENAME> WITH FULLSCAN
sp_createstats 'indexonly'
```

For example, the script should be similar to this:

```
exec sp_createstats 'indexonly'
UPDATE STATISTICS PS_BU_TYPE_INV WITH FULLSCAN;
UPDATE STATISTICS PSAPMSGARCHPD WITH FULLSCAN;
```

- Enable RCSI.

If you upgraded your PeopleSoft database as a result of an application upgrade you must activate now the READ COMMITTED SNAPSHOT ISOLATION level for the upgraded database since all the PeopleSoft 9 applications will use that isolation level by default.

To enable RCSI you can use the script labeled ENABLE\_RCSI.SQL available under <PS\_HOME>\scripts for all the PeopleTools 8.48 and above. Please edit and review the script before running it. Make sure there is no database activity and no other connections to the database, otherwise RCSI will not be activated (see books online for further details).

The script executes the following command:

```
ALTER DATABASE <DBNAME> SET READ_COMMITTED_SNAPSHOT ON
```

To verify if the database is using RCSI you may run the following SQL command:

```
select is_read_committed_snapshot_on from sys.databases where database_id = db_⇒
id ('DATABASENAME')
```

The output must be the number 1 (one), which means, RCSI is enabled.

- Check the login.

By default login accounts created on SQL Server 2005 will inherit the password policies from their OS. If the password for the migrated logins does not comply with the OS, you may experience problems signing on with those login names and passwords.

There are several ways to solve the problem. One simple solution is to disable the feature for each login or to change its password. However, remember that if you change the password for the logins used as CONNECTID or ACCESSID, you must update and encrypt through Data Mover the appropriate security tables (PSSTATUS, PSOPRDEFN, PSACCESSPRFL) with the new values to be able to log in again to your PeopleSoft database.

See *Enterprise PeopleTools 8.49 PeopleBook: Security Administration*.



## APPENDIX H

# Using the XSLT Mapper with Oracle BPEL Process Manager

---

## Understanding the XSLT Mapper

The Extensible Stylesheet Language Transformation (XSLT) mapper is intended for application developers and consultants who write PeopleSoft Application Engine programs of type “transform.” The XSLT mapper allows you to write transformation programs without hard-coding each XSLT step. The XSLT mapper is integrated with JDeveloper BPEL Designer, a component of Oracle BPEL Process Manager. To use the XSLT mapper, you must first install Oracle BPEL Process Manager, and then specify the location of the JDeveloper files in your PeopleSoft installation.

This section assumes that you have installed the PeopleSoft workstation.

### See Also

“Setting Up the Install Workstation”

*Enterprise PeopleTools 8.49 PeopleBook: Integration Broker*, “Applying Filtering, Transformation and Translation”

---

## Task H-1: Installing BPEL Process Manager

Download the Oracle BPEL Process Manager software and installation instructions from the Oracle Technology Network (OTN). Install the BPEL Process Manager on a Windows-based machine.

See Oracle Technology Network, <http://www.oracle.com/technology/index.html>

Search the OTN documentation web site for information on installing BPEL Process Manager.

See Oracle Documentation, <http://www.oracle.com/technology/documentation/index.html>

Be sure to obtain any patches that are required for the installation from the following location:

<ftp://ftp.peoplesoft.com/outgoing/ptools/Oracle/BPEL>

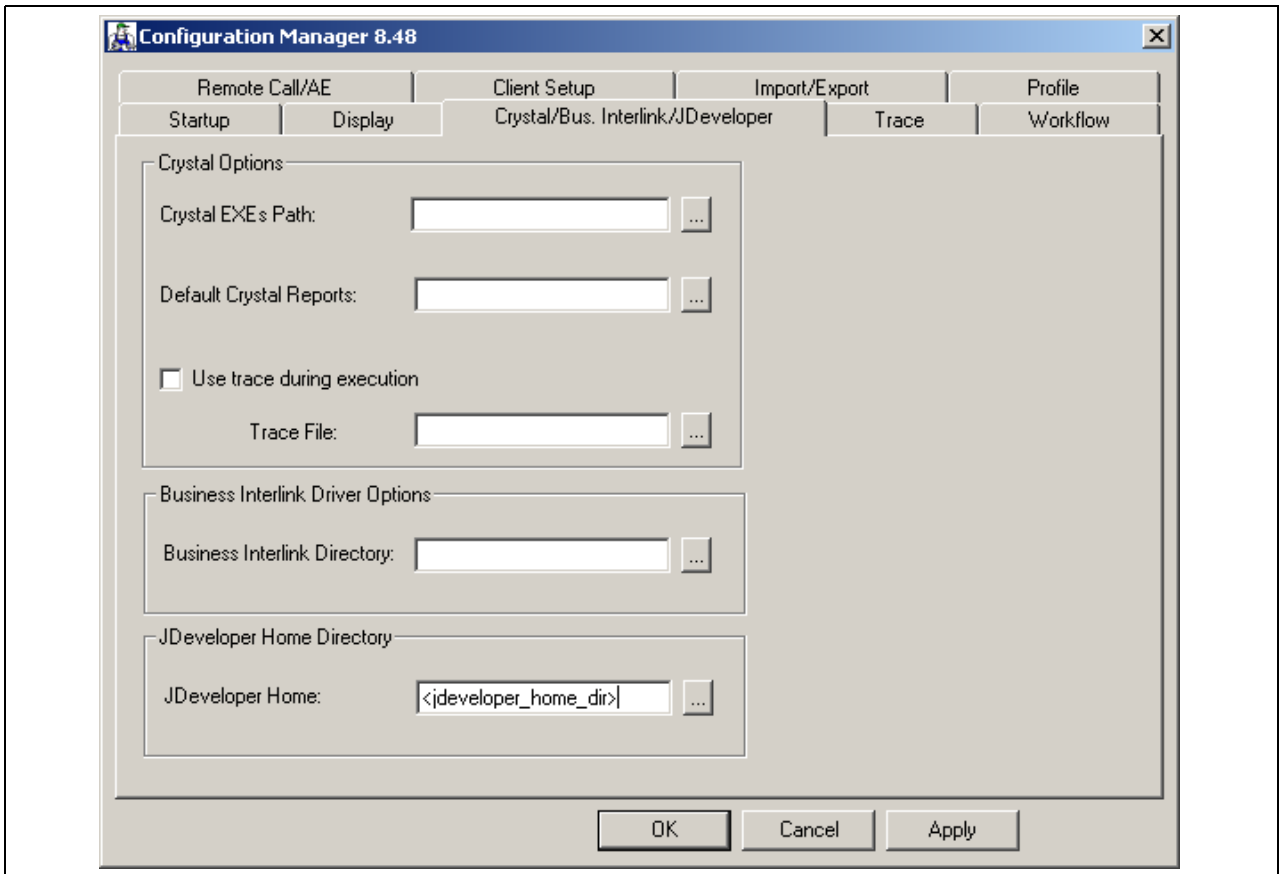
---

## Task H-2: Setting Up the XSLT Mapper

To use the XSLT mapper, use Configuration Manager to specify the directory for JDeveloper:

1. Launch Configuration Manager by doing one of the following:

- Select Start, Program, PeopleTools 8.49, Configuration Manager.
  - Double-click <PS\_HOME>/bin/client/winx86/pscfg.exe.
2. Select the Crystal/Bus. Interlink/JDeveloper tab.



Configuration Manager: Crystal/Bus. Interlink/JDeveloper tab

3. Click the JDeveloper Path browse button (...) and select the JDeveloper directory.

In a default installation of the BPEL Process Manager, the JDeveloper path is <OraBPELPM\_HOME>/integration/jdev.

Configuration Manager will verify that the version of JDeveloper is valid. If not, when you click OK to save the changes and exit Configuration Manager, an error message appears.

4. Click OK.

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