PeopleSoft Enterprise Portal Solutions 9.1
Installation Guide

December 2009
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About This Documentation

This preface discusses:

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

Understanding This Documentation

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

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

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

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

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

Audience

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

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

- SQL and SQL command syntax.
- PeopleSoft system navigation.
Preface

- PeopleSoft windows, menus, and pages, and how to modify them.
- Microsoft Windows.

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

See Oracle University http://education.oracle.com

### Typographical Conventions and Visual Cues

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

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

This documentation may refer to these products and product families:

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

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

Related Information

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

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

To access PeopleSoft PeopleBooks, go to My Oracle Support, select the Knowledge tab, and search for the PeopleSoft PeopleBooks for your application and release.

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

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleSoft PeopleBooks, and other Oracle reference and training materials. Please send your suggestions to:

PSOFT-Infodev_US@oracle.com

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.
CHAPTER 1

Understanding PeopleSoft Enterprise Portal Solutions

This chapter discusses:

• Understanding PeopleSoft Portal Solutions vs. the Enterprise Portal Product
• Understanding Portal Host and Content Provider Databases
• Understanding PeopleSoft Enterprise Portal Solutions Products

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

Note. References in this documentation to PeopleSoft PeopleTools 8.4x refer to the current PeopleSoft PeopleTools release level; for example, PeopleSoft PeopleTools 8.50 is part of the PeopleSoft PeopleTools 8.4x codeline.

Understanding PeopleSoft Portal Solutions vs. the Enterprise Portal Product

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

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

Understanding Portal Host and Content Provider Databases

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

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

<table>
<thead>
<tr>
<th>PeopleSoft Enterprise Portal Solutions Products</th>
<th>PeopleSoft Application Databases</th>
<th>EMPLOYEE</th>
<th>CUSTOMER</th>
<th>SUPPLIER</th>
<th>PARTNER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise Portal</td>
<td>Enterprise Portal</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>CRM Portal Pack</td>
<td>Customer Relationship Management</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EPM Portal Pack</td>
<td>Enterprise Performance Management</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ESA Portal Pack</td>
<td>Financials Supply Chain Management (8.8 or higher)</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financials Portal Pack</td>
<td>Financials Supply Chain Management</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supply Chain Portal Pack</td>
<td>Financials Supply Chain Management</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Investor Portal</td>
<td>Enterprise Performance Management</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internal Controls Enforcer</td>
<td>Enterprise Performance Management</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CHAPTER 2

Installing PeopleSoft Enterprise Portal

This chapter discusses:

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

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

This section discusses:

• Understanding PeopleSoft Portal Registry Definitions
• Understanding Multilingual Portal Installation

Understanding PeopleSoft Portal Registry Definitions

Oracle’s PeopleSoft applications that release on PeopleSoft PeopleTools 8.50 are delivered with several portal registry definitions. PeopleSoft Enterprise Portal 9.1 supports the active use of multiple portal registries in a single PeopleSoft Enterprise Portal database. Use the default portal registry when you sign on to the database from the browser.

Understanding Multilingual Portal Installation

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

Prerequisites for Internet Connectivity

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

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

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

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

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

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

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

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

The following requirements must be met before you install the PeopleSoft Enterprise Portal.

- The installation of the appropriate version of PeopleSoft PeopleTools.
  The PeopleSoft Enterprise Portal database requires the installation of PeopleSoft PeopleTools 8.50.01 or higher.
- The availability of the appropriate resources for your PeopleSoft Enterprise Portal demo database.
  The following table lists the minimum PeopleSoft Enterprise Portal demo database size for each platform:

<table>
<thead>
<tr>
<th>Platform</th>
<th>Minimum Database Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>DB2/UNIX - ANSI</td>
<td>3.4 GB</td>
</tr>
<tr>
<td>DB2/UNIX - Unicode</td>
<td>4.5 GB</td>
</tr>
<tr>
<td>DB2/zOS Non-Unicode</td>
<td>2.6 GB</td>
</tr>
<tr>
<td>DB2/zOS Unicode</td>
<td>2.7 GB</td>
</tr>
<tr>
<td>Microsoft SQL Server Non-Unicode</td>
<td>1.0 GB</td>
</tr>
<tr>
<td>Microsoft SQL Server - Unicode</td>
<td>2.0 GB</td>
</tr>
<tr>
<td>Oracle - ANSI/Unicode</td>
<td>4.5 GB</td>
</tr>
</tbody>
</table>

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

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

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

See Oracle E-Delivery, http://edelivery.oracle.com

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

Task 2-2: Installing PeopleSoft PeopleTools

This chapter does not provide information on the installation of the PeopleSoft PeopleTools product.
Warning! You must maintain a separate PS_HOME directory for your PeopleSoft Enterprise Portal database. Due to varying license codes, the installed PeopleSoft PeopleTools PS_HOME used by the PeopleSoft Enterprise Portal database and the installed PeopleSoft PeopleTools PS_HOME used by any additional PeopleSoft application databases cannot be the same.

See PeopleSoft Enterprise PeopleTools 8.50 Installation Guide (for your database platform), "Preparing for Installation, Defining Installation Locations."

Task 2-3: Installing PeopleSoft PeopleBooks

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

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

See PeopleSoft Enterprise PeopleTools 8.50 Installation Guide (for your database platform), "Installing PeopleBooks."

Task 2-4: Installing PeopleSoft Enterprise Portal 9.1

To install PeopleSoft Enterprise Portal 9.1:

1. Download the eDelivery zip file to a convenient directory on the machine that you are using for your PeopleSoft installation.
2. Unzip the files.
3. Locate the installation executable in the extracted root directory or the disk1 directory.
4. Run the setup (setup.exe) application from the root directory of the unzipped files.
   The PeopleSoft InstallShield Wizard Welcome page appears.
5. Review the PeopleSoft Installer Welcome page, and then click Next.
   The PeopleSoft License Agreement Terms page appears.
6. Review the license agreement. If you accept the license agreement terms, select the I accept the terms of the license agreement check box, and then click Next.
   The PeopleSoft License Code Details page appears.
7. Enter your PeopleSoft license code, and click Next.
   The PeopleSoft Select Database Platform option page appears.
8. Select the database platform that you want to use, and then click Next.
   The PeopleSoft Select Database Type option page appears.
9. Select the database type: \textit{Non-Unicode Database} or \textit{Unicode Database}, and then click Next. The PeopleSoft Select Server Types to Install option page appears.

10. Select the types of servers that you want to install, and then click Next. The PeopleSoft Select the Installation Directory option page appears.

11. Select the directory to which you want to install PeopleSoft Enterprise Portal 9.1. Click Browse to specify the server installation directory name, and then click Next.

\textbf{Note}. The database server directory must be the $PS\_HOME$ directory of the installed PeopleSoft PeopleTools product for the PeopleSoft Enterprise Portal database.

12. Select the PeopleSoft Enterprise Portal features that you want to install, and click Next. The PeopleSoft Confirmation page appears.

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

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

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

\textbf{Task 2-5: Installing Multilingual PeopleSoft Enterprise Portal 9.1}

\textbf{Note}. Perform this task only if you are installing a multilingual PeopleSoft Enterprise Portal database.

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

2. Unzip the files.

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

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

The PeopleSoft Installer Welcome page appears.

5. Review the PeopleSoft Installer Welcome page, and then click Next. The PeopleSoft License Agreement page appears.

6. Review the license agreement. If you accept the license agreement terms, select the \textit{I accept the terms of the license agreement} check box, and then click Next. The PeopleSoft License Code Details page appears.

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

The PeopleSoft Select Database Type option page appears.

8. Select the database platform that you want to use, and then click Next. The PeopleSoft Select Database Type option page appears.

9. Select the database type: \textit{Non-Unicode Database} or \textit{Unicode Database}, and then click Next.
The PeopleSoft Select Server Types for Install option page appears.
10. Select the types of servers that you want to install, and click Next.

The PeopleSoft Select the Installation Directory option page appears.
11. Select the directory to which you want to install PeopleSoft Enterprise Portal 9.1.
Click Browse to specify the server install directory name, and then click Next.

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

The PeopleSoft Language Features option page appears.
12. Select the PeopleSoft Enterprise Portal language features that you want to install, where <language> matches the languages that you are installing, and then click Next.

The PeopleSoft Confirmation page appears.
13. The Confirmation page displays the installation options that you selected. Click Next to begin the installation.
A progress bar displays to indicate the progress of the installation.
14. When the installation completes, click Finish to exit the PeopleSoft Installer.

Task 2-6: Installing the PeopleSoft Enterprise Portal Database

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

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

See PeopleSoft Enterprise PeopleTools 8.50 Installation Guide (for your database platform), "Creating a Database."

Task 2-7: Setting Up the Application Server

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

1. Run the psadmin utility from your <PS_HOME>/appserv directory.
2. Enter the user ID and user password values that contain the appropriate security to start the application server.
   The PeopleSoft Enterprise Portal database delivers with application server security that is granted to the user ID and user password values VP1 and VP1.
3. When configuring the application server, the WSL, JSL, and JRAD port numbers populate by default.
   These values must be unique for the PeopleSoft Enterprise Portal database application server. You can alter the port values as necessary.
4. To access the PeopleSoft Enterprise Portal database application server from the PeopleSoft Enterprise Portal database web server, you must know some of the values that you used to set up the application server. For your reference, complete the following table:

<table>
<thead>
<tr>
<th>Necessary Information</th>
<th>PA Demo Database</th>
<th>PA System Database</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database Name</td>
<td>PA910DMO, for example.</td>
<td>PA910SYS, for example.</td>
</tr>
<tr>
<td>Application Server Name</td>
<td>appservermachine1, for example.</td>
<td>appservermachine1, for example.</td>
</tr>
<tr>
<td>JSL Port</td>
<td>9000, for example</td>
<td>9010, for example.</td>
</tr>
</tbody>
</table>

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

See *PeopleSoft Enterprise PeopleTools 8.50 Installation Guide (for your database platform)*, "Configuring the Application Server."

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

See *Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration.*

---

### Task 2-8: Setting Up the Process Scheduler

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

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

See *PeopleSoft Enterprise PeopleTools 8.50 Installation Guide (for your database platform)*, "Setting Up Process Scheduler."

---

### Task 2-9: Setting Up the Web Server

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

- **Localhost**—The web server machine name where the PeopleSoft Pure Internet Architecture for the PeopleSoft Enterprise Portal database is installed.
- **Site Name**—The web server directory folder where the files for the PeopleSoft Enterprise Portal database are installed.

  The default value is `ps`. 

---

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

See PeopleSoft Enterprise PeopleTools 8.50 Installation Guide (for your database platform), "Setting Up the PeopleSoft Pure Internet Architecture."

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

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

2. The initial default site name for the PeopleSoft Pure Internet Architecture set up is `ps`.
   
   In subsequent PeopleSoft Pure Internet Architecture set ups, change the Default Site Name of `ps` to a unique value.

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

3. Use the values from the table in the previous task, “Setting Up the Application Server,” to complete the following steps:
   
   a. In the AppServer Name field, enter the machine name of the PeopleSoft Enterprise Portal database application server.
   b. In the JSL Port field, enter the JOLT port number of the PeopleSoft Enterprise Portal database application server, for example, `appservermachine1`.
      
      The default value is `9000`.

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

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

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

<table>
<thead>
<tr>
<th>Necessary Information</th>
<th>PA Demo Database</th>
<th>PA System Database</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database Name</td>
<td>PA910DMO, for example.</td>
<td>PA910SYS, for example.</td>
</tr>
<tr>
<td>Site Name</td>
<td>pa910dmo, for example.</td>
<td>pa910sys, for example.</td>
</tr>
<tr>
<td>Localhost</td>
<td>myserver, for example.</td>
<td>myserver.mydomain.com:8080, for example.</td>
</tr>
</tbody>
</table>

Task 2-10: Testing the PeopleSoft Portal Database Sign-On

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

To sign on to the PeopleSoft Enterprise Portal from the browser:
   a. Replace localhost with the hostname of the web server machine where you installed the PeopleSoft Enterprise Portal database web server files.
   b. Replace pshome with the site name of the PeopleSoft Enterprise Portal database web server files. This should be the name of your PeopleSoft Enterprise Portal database, or the default value of ps.

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

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

   For example:

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

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

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

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

   • My Page (default)
   • Guest
   • Administration

---

**Task 2-11: Setting the Default Portal Registry Definition**

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

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

To set the default portal name:

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

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

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

   • /EMPLOYEE/EMPL/
   • /CUSTOMER/CUST/
   • /SUPPLIER/SUPP/
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- /PARTNER/PART/
  Replace with the following:
  
  /PS_SITETEMPLATE/ENTP/

3. On your keyboard, click the ENTER key to activate the adjusted address.
   A list of available portal names appears.
5. Select the portal that you want as the default portal from the following values: CUSTOMER, EMPLOYEE, SUPPLIER, and PARTNER.

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

6. Click Save.
7. Close your browser.
8. Stop the PeopleSoft Enterprise Portal database web server.

Task 2-12: Extending Directory Paths and Copying Folders

This section discusses:
- Extending the Web Folder Directory
- Copying Demo Folders and Files to the Web Server

PeopleSoft Pure Internet Architecture installation allows you to create multiple websites under the same domain. In addition to your custom website names, PeopleSoft Enterprise Portal requires that you have one website named ps to have a common location to store files for multiple sites.

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

Task 2-12-1: Extending the Web Folder Directory

To extend the web folder directory:

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

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

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

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

2. The resulting directory paths are:

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

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

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

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

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

Task 2-12-2: Copying Demo Folders and Files to the Web Server

To copy demo folders and files to the web server:

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

1. Copy the contents of the portal_pa directory from <PS_HOME>/ps/images/portal_pa/ into the appropriate web server machine directory:

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

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

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

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

2. The resulting directory paths are:

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

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

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

IBM WebSphere - UNIX: <PIA_HOME>/webserv/<peoplesoft>/installedApps/<peoplesoft>NodeCell
<peoplesoft>.ear/PORTAL.war/<ps>/images/portal_pa/<website folder + image files + other files>
Task 2-13: Setting Up and Updating Menu Items and Tasks

This section discusses:

• Setting Up Menu Items and Integrated Task List FTP
• Updating the Menu Item FTP URL Definition
• Updating the Tasks FTP URL Definition

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


Task 2-13-1: Setting Up Menu Items and Integrated Task List FTP

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

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

1. Establish additional FTP services on an FTP file server.
2. Create multiple FTP IDs on the same server.
   These different IDs can then point to different directories on the same server machine as required by the various FTP URLs.

Task 2-13-2: Updating the Menu Item FTP URL Definition

To update the Menu Item FTP URL definition:

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

1. Sign on to PeopleSoft Enterprise Portal from the browser.
2. Select PeopleTools, Utilities, Administration, URLs.
3. In the URL Identifier field, enter MENU_ITEMS, and then click Search.
4. Using the format ftp://FTPuser:FTPPassword@FTPServername/FTPfolder, change the URL to the FTP server URL that you defined.

Task 2-13-3: Updating the Tasks FTP URL Definition

To update the Tasks FTP URL definition:

Note. Perform this task only if you want to store the file attachments for the Task pagelet on an FTP server, instead of within the database.
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1. Sign on to PeopleSoft Enterprise Portal from the browser.
2. Select PeopleTools, Utilities, Administration, URLs.
3. In the URL ID field, enter T{ARRAY}ASKS, and then click Search.
4. Using the format ftp://FTPuser:FTPpassword@FTPservername/FTPfolder, change the URL to the FTP server that you defined.

Task 2-14: Setting the Content Management Storage Locations

This section discusses:

- Understanding Content Management Image Setup
- Establishing FTP Service for Image Attachments
- Updating the EPPCM_IMAGE URL Identifier Definition
- Updating the CMDOCFS URL Identifier

Task 2-14-1: Understanding Content Management Image Setup

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

- Extend the web server directory to include the folder path ps/images/portal_pa/.
  
  See “Extending the Web Folder Directory.”

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

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

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

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

Task 2-14-2: Establishing FTP Service for Image Attachments

To establish FTP service for Content Management FTP image attachments:

1. Establish an FTP service on the machine that hosts the PeopleSoft Enterprise Portal web server.
2. Set the FTP home directory to be the same as that of the web server extended path.
   
   For example:

   If the web server extended directory is as follows:
Task 2-14-3: Updating the EPPCM_IMAGE URL Identifier Definition

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

1. Sign on to the PeopleSoft Enterprise Portal from the browser.
2. Select PeopleTools, Utilities, Administration, URLs.
3. In the URL ID field, enter EPPCM_IMAGE, and then click Search.
4. Update the URL field value to point to the FTP server that is created on the web server machine.

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

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

Task 2-14-4: Updating the CMDOCFS URL Identifier

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

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

1. Sign on to the PeopleSoft Enterprise Portal from the browser.
2. Select PeopleTools, Utilities, Administration, URLs.
3. In the URL ID field, enter CMDOCFS, and then click Search.
4. Change the URL to your defined FTP server URL, using the format ftp://FTPuser:FTPpassword@FTPservername/FTPfolder.

Task 2-15: Configuring the Resource Finder Profile Page

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

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

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

In the EPX_CALENDARPAGE.htm file:

Oracle WebLogic Server - NT: $PIA_HOME$\webserv\peoplesoft\applications\peoplesoft\PORTAL.war\ps\images\portal_pa\EPX_CALENDARPAGE.htm
Oracle WebLogic Server - UNIX: $PIA_HOME$/webserv/$peoplesoft$/applications/$peoplesoft$/PORTAL.war/$ps$/images/$portal_pa$/EPX_CALENDARPAGE.htm

IBM WebSphere - NT: $PIA_HOME$/webserv/$peoplesoft$/installedApps/$peoplesoft$/NodeCell/$peoplesoft$.ear/PORTAL.war/$ps$/images/$portal_pa$/EPX_CALENDARPAGE.htm

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

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

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

For example, if the web server domain was peoplesoft.com, the change would be as follows:

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

**See Also**

*PeopleSoft Enterprise Portal 9.1 PeopleBook: PeopleSoft Enterprise Portal Resource Finder*

---

**Task 2-16: Updating PeopleSoft Enterprise Portal Options**

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

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

To update PeopleSoft Enterprise Portal options:

1. Use PeopleSoft Data Mover to sign on to your PeopleSoft Enterprise Portal system database.
2. Open the $<PS_HOME>$/scripts\ PORTAL_SYSOPTIONS.DMS script.
3. Follow the directions that are outlined in the script text carefully.
4. Run this script against the PeopleSoft Enterprise Portal system database.
5. Close PeopleSoft Data Mover.

---

**Task 2-17: Removing Demo Portal Registry Data**

This section discusses:
• Removing Demo Portal Registry Data

• Cleaning the System Data

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

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

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

For more information about creating a news publication pagelet, refer to the PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System "Working With News Publications."

For more information about creating sites, refer to the PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration "Using Site Management."

**Task 2-17-1: Removing Demo Portal Registry Data**

To remove demo portal registry data:

1. Sign on to the demo database in PeopleSoft Application Designer.
2. Select File, Open.
3. In the Definition field, select Project, and then click Open.
4. In the Name column, select the PORTAL_PASYSDEL project, and then click Open.
5. Select Tools, Copy Project, To Database.
6. Enter the name of your PeopleSoft Enterprise Portal system database, user ID, and password, and then click OK.
7. Click Select All.
8. Click Copy; this may take a few minutes.
   When you click Copy, a dialog box appears informing you that the project already exists.
9. In the dialog box, click Yes to continue to copy the project to your system database.
   Although the project already exists, copying the PORTAL_PASYSDEL project into your system database deletes the intended objects.

**Task 2-17-2: Cleaning the System Data**

To clean the system data:

Note. Run this script after copying the PORTAL_PASYSDEL project.

1. Sign on to your PeopleSoft Enterprise Portal system database using PeopleSoft Data Mover.
2. Open the PeopleSoft Data Mover script <PS_HOME>\scripts\ PORTAL_PASYS_CLEAN.DMS.
3. Run this script against the PeopleSoft Enterprise Portal system database.

---

**Task 2-18: Cleaning Homepage Tab Definitions**

This section discusses:

- Cleaning the Homepage Tab Definitions
- Refreshing and Deleting Server Caches

**Task 2-18-1: Cleaning the Homepage Tab Definitions**

To clean the homepage tab definitions:

1. Sign on to your PeopleSoft Enterprise Portal database using PeopleSoft Data Mover.
2. Open the `<PS_HOME>/scripts/PORTAL_HP_TAB_CLEAN.DMS` script.
3. Run this script against the PeopleSoft Enterprise Portal database.

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

**Task 2-18-2: Refreshing and Deleting Server Caches**

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

1. Stop the PeopleSoft Enterprise Portal database web server.
2. Stop the PeopleSoft Enterprise Portal database application server.
3. Purge the PeopleSoft Enterprise Portal database application server cache.
4. Start the PeopleSoft Enterprise Portal database application server.
5. Start the PeopleSoft Enterprise Portal database web server.

---

**Task 2-19: Configuring Integration Broker for Feed Publishing**

This section discusses:

- Understanding Integration Broker Configuration for Feed Publishing
- Configuring the Integration Broker Gateway and Node Application Server
- Configuring the Service Target Location
- Configuring the WebLogic Web Server
- Configuring the Default User of the ANONYMOUS Node
• Configuring the Content URI and Portal URI Node Properties

**Understanding Integration Broker Configuration for Feed Publishing**

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

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

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

**Task 2-19-1: Configuring the Integration Broker Gateway and Node Application Server**

To configure the Integration Broker gateway and node application server:

1. Select PeopleTools, Integration Broker, Configuration, Quick Configuration.
   
   Ensure that the gateway URL is configured.

   ![Integration Broker Quick Configuration page](image)

2. Click Ping Gateway.
   
   The PeopleSoft Integration Gateway page appears.

   ![PeopleSoft Integration Gateway page](image)

3. Click the Advanced Gateway Setup link on the Integration Broker Quick Configuration page to access the Gateways page.
4. Click the Gateway Setup Properties link and login.

The PeopleSoft Node Configuration page appears.
5. Configure the default application server as well as the application server of the default local node for the Enterprise Portal database.

6. Click Save.

7. Click Ping Node.

   The Ping Node Results page appears. The Message Text column should read Success.

8. Click Return to go back to the PeopleSoft Node Configuration page.

9. Click the Advanced Properties Page link.

   The Gateway Properties page appears.
10. Enter the proxy information if the Web Server needs to go through a proxy server to connect to the Internet.

11. Ensure that the `secureFileKeystorePasswd` is correct and encrypted.

   Use the Password Encryption Utility to encrypt the password if required.
12. Click OK.

The PeopleSoft Node Configuration page appears.

13. Click Save.

See Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker Administration, Chapters: “Using the Integration Broker Quick Configuration Page,” “Managing Integration Gateways,” and “Using Listening Connectors and Target Connectors.”

**Task 2-19-2: Configuring the Service Target Location**

To configure the service target location:

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

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

Task 2-19-3: Configuring the WebLogic Web Server

When the WebLogic web server is used, the WebLogic server configure file may need to be changed to disable the HTTP Basic Authentication validation on the web server.

To configure the WebLogic web server:

1. Open the `<PIA_HOME>\webserv\<WEB_SERVER_DOMAIN>\config\config.xml` file.
2. Add

   `<enforce-valid-basic-auth-credentials>false</enforce-valid-basic-auth-credentials>`

   before the “<security-configuration>” closing tag.

   For example, change the following:
   `<node-manager-password-encrypted>{3DES}+1vwjK32GUgkWwutgxuUww==</node-manager-password-encrypted>
   </security-configuration>`

   to this:
   `<node-manager-password-encrypted>{3DES}+1vwjK32GUgkWwutgxuUww==</node-manager-password-encrypted>
encrypted>
  <enforce-valid-basic-auth-credentials>false</enforce-valid-
  basic-auth-credentials>
</security-configuration>

Note. This task is not required for the IBM WebSphere web server.

**Task 2-19-4: Configuring the Default User of the ANONYMOUS Node**

To configure the default user of the ANONYMOUS node:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Search and open the ANONYMOUS node.
3. Select the Node Definitions tab and ensure that the Default User ID is a valid user ID with limited privileges, such as the PAPP_USER user, or any other user based on the requirement.

![Node Definitions page]

See Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker Administration, Chapter: “Adding and Configuring Nodes.”

**Task 2-19-5: Configuring the Content URI and Portal URI Node Properties**

To configure the content URI and portal URI node properties:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Search and open the default local node (PSFT_PA).
3. Ensure that the Authentication Option is *Password* or *Certificate*. 
4. Select the Portal tab and ensure that the Content URI Text and the Portal URI Text are pointing to the Enterprise Portal database.

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

6. Repeat Step 4 for each node.
CHAPTER 3

Installing PeopleSoft Single Sign-On

This chapter discusses:

• Prerequisites
• Utilizing the Network Domain Name
• Adding the Content Provider URI Path
• Renaming and Configuring Password Authentication
• Configuring a Default Local Node in a Content Provider
• Configuring PS Portal URI in Content Provider
• Setting Up Common User IDs
• Testing PeopleSoft Single Sign-On
• Troubleshooting PeopleSoft Single Sign-On

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

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

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

See PeopleSoft Enterprise PeopleTools 8.50 Installation Guide (for your database platform), "Configuring the Application Server."

See PeopleSoft Enterprise PeopleTools 8.50 Installation Guide (for your database platform), "Setting Up the PeopleSoft Pure Internet Architecture in GUI Mode."

See PeopleSoft Enterprise PeopleTools 8.50 Installation Guide (for your database platform), "Setting Up the PeopleSoft Pure Internet Architecture in ConsoleMode."

Prerequisites

Complete the tasks in this chapter after you successfully install the content provider and PeopleSoft Enterprise Portal databases, as well as the application and web servers.
PeopleSoft Enterprise Portal database access to additional PeopleSoft databases is accomplished through content providers and PeopleSoft Single Sign-On. PeopleSoft Single Sign-On allows you to access the multiple content provider databases from the PeopleSoft Enterprise Portal database without signing on to each database.

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

- The PeopleSoft Enterprise Portal and content provider database web server configuration.properties files include the full network domain name.
- The PeopleSoft Enterprise Portal database contains the content provider database mapped URI that includes the full network domain name.
- The PeopleSoft Enterprise Portal database default local node is configured with password authentication in the PeopleSoft Enterprise Portal and content provider databases.
- The PeopleSoft Enterprise Portal database and the content provider database contain common user IDs.
- The content provider database lists the PeopleSoft Enterprise Portal database default local node as trusted.
- In addition to the requirements that are listed here, the PeopleSoft Enterprise Portal and content provider databases on PeopleSoft PeopleTools 8.48 or higher must also have the following in place: The content provider database must contain the PeopleSoft Enterprise Portal database mapped URI that includes the full network domain name.

**Note.** Remember that PeopleSoft Enterprise Portal 9.1 runs on PeopleSoft PeopleTools 8.50.

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

- The PeopleSoft Enterprise Portal database must contain the content provider database mapped URI.
- The PeopleSoft Enterprise Portal database default local node is configured with password authentication in the PeopleSoft Enterprise Portal and content provider databases.
- The PeopleSoft Enterprise Portal database and the content provider database contain common user IDs.
- The content provider database lists the PeopleSoft Enterprise Portal database default local node as trusted.
- In addition to the requirements that are listed here, the PeopleSoft Enterprise Portal and content provider databases on PeopleSoft PeopleTools 8.48 or higher must also have the following in place: The content provider database must contain the PeopleSoft Enterprise Portal database mapped URI that includes the full network domain name.

**Note.** Remember that PeopleSoft Enterprise Portal 9.1 runs on PeopleSoft PeopleTools 8.50.

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**Task 3-1: Utilizing the Network Domain Name**

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

**Note.** Perform this task only if the web servers for your PeopleSoft Enterprise Portal database and any single content provider database reside on different machines.
For databases whose web servers reside on different machines, you must utilize the network domain name in the web server configuration. Extend the localhost name to include the full domain name. You can do this by appending the domain name to the hostname of the web server machine name. For example, assume the following:

- The PeopleSoft Enterprise Portal web server machine localhost name is myserver1.
- The content provider web server machine localhost name is myserver2.
- The network full domain name is mydomain.com.

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

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

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

See Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology.

See Enterprise PeopleTools 8.50 PeopleBook: Security Administration.

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


See PeopleSoft Enterprise PeopleTools 8.50 Installation Guide, "Setting Up the PeopleSoft Pure Internet Architecture on UNIX."

See Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology.

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

**Note.** When setting the Authentication Token Domain in the PeopleSoft Enterprise Portal database web server configuration, the browser URL address must include the network domain name as part of the localhost value. Refer to the "Testing PeopleSoft Single Sign-On" task in this chapter.
Task 3-2: Adding the Content Provider URI Path

This section discusses:

- Understanding Adding the Content Provider URI Path
- Updating the Content Provider URI Paths

Understanding Adding the Content Provider URI Path

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

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

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

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

To update content provider URI paths:

1. From your browser, sign on to the PeopleSoft Enterprise Portal database.
   The Nodes search page appears.
3. Select the content provider node.
   The Node Definitions page appears.
4. On the Node Definitions tab, verify that the Node Type field value is set to PIA for the content provider node.
5. On the Portal tab, enter the content URI text using the following example:
   \( http://localhost/psc/pshome \)
   Example for Port 80: \( http://myserver/... \)
   Example for Port other than 80: \( http://myserver:8080/... \)
   Example for Port 80 with a network domain name: \( http://myserver.mydomain.com/... \)
   Example for Port other than 80 with a network domain name: \( http://myserver.mydomain.com:8080/... \)
6. Perform the same steps to enter the portal URI text using the following example:
   \( http://localhost/psp/pshome/ \), where pshome is the home folder that was installed during the PeopleSoft Pure Internet Architecture installation.

Task 3-3: Renaming and Configuring Password Authentication

This section discusses:
Chapter 3 Installing PeopleSoft Single Sign-On

- Renaming the PeopleSoft Enterprise Portal Default Local Node
- Configuring the Password in the PeopleSoft Enterprise Portal Database

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

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

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

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

To rename the PeopleSoft Enterprise Portal database default local node:

<table>
<thead>
<tr>
<th>Note. You can only rename database message nodes. You cannot rename content provider message nodes.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. From your browser, sign on to the PeopleSoft Enterprise Portal database.</td>
</tr>
<tr>
<td>3. Click Search.</td>
</tr>
<tr>
<td>4. Select the node name that you want to rename.</td>
</tr>
<tr>
<td>5. On the Node Definitions tab, click Rename.</td>
</tr>
<tr>
<td>6. Enter the new name for the PeopleSoft Enterprise Portal database default local node.</td>
</tr>
<tr>
<td>7. Click Save.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Note. You cannot rename message nodes that contain queued messages or are referenced in runtime tables.</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you get the following error message, you cannot rename the node until you clear all queued messages on that message node: &lt;Node name&gt; is in use by the Publish/Subscribe system. It may not be renamed.</td>
</tr>
<tr>
<td>If you get the following error message, you need to remove the routing and messages defined for this node: Node &lt;Node Name&gt; cannot be renamed. Node referenced in runtime tables.</td>
</tr>
</tbody>
</table>
Task 3-3-2: Configuring the Password in the PeopleSoft Enterprise Portal Database

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

1. From your browser, sign on to your PeopleSoft Enterprise Portal database.
   
   The Node Definition Search page appears.
3. Click Search.
4. Select the PeopleSoft Enterprise Portal default local node.
   
   The default local node contains the default local node value of \( Y \). The PeopleSoft Enterprise Portal database delivered default local node is \( PSFT\_PA \). Be sure to use the node name that you used when renaming the PeopleSoft Enterprise Portal database default local node. The new node name is likely to be the same as your PeopleSoft Enterprise Portal database name.
5. In the Authentication Option field on the Node Definition tab, select the \( Password \) value.
6. In the Password field, enter \(<\text{Node Password}>\). Then on your keyboard, press the \( \text{Tab} \) key.
7. In the Confirm Password field, enter \(<\text{Node Password}>\).
8. Click Save.
10. Start the PeopleSoft Enterprise Portal database web server.

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

This section discusses:

• Signing On to Your Content Provider Database
• Renaming the Default Local Node in a Content Provider
• Trusting Default Local Node for PeopleSoft PeopleTools 8.4x
• Configuring 8.4x Content Provider Password

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

To sign on to your content provider database:

1. Open your browser.
2. Enter the URL for the content provider database. The URL uses the format \( http://localhost/pshome/signon.html \).
   
   Replace \( localhost \) with the \( \text{hostname} \) of the web server machine where the content provider database web server files are installed.
   
   Replace \( pshome \) with the \( \text{site name} \) of the PeopleSoft content provider database web server files. The default value is \( ps \) for PeopleSoft PeopleTools 8.4x databases.
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Note. If the web server for the content provider database is using an Authentication Token Domain, then the localhost value must include the network domain name in the URL. If the web server for the content provider database is using an HTTP port other than the default port of 80, then the localhost value must contain the port number in the URL.

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

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

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


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

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

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

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

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

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

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

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

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

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

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

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

   The Node Definitions Search page appears.
3. Click Search.
4. Select the node name that you want to rename.
   
   This is the original node name of the default local node that you renamed in the PeopleSoft Enterprise Portal database. The delivered default local node for the PeopleSoft Enterprise Portal database is PSFT_PA.
5. On the Node Definition tab, click Rename.
6. Enter the new name that you want to use for the PeopleSoft Enterprise Portal database default local node in the content provider database.

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

7. Click Save.

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

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

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

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

1. From your browser, sign on to your PeopleSoft PeopleTools 8.4x content provider database.
   The Single Signon page appears.
3. Click Add to insert a new row.
4. Select the PeopleSoft Enterprise Portal database default local node.
   If you renamed the PeopleSoft Enterprise Portal database default local node, use the new node name. This new node name is likely to be the same as your PeopleSoft Enterprise Portal database name.
5. Click Save.
6. Restart the content provider database web server.

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

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

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

1. From your browser, sign on to your PeopleSoft PeopleTools 8.4x content provider database.
   The Node Definitions Search page appears.
3. Click Search.
4. Select the PeopleSoft Enterprise Portal databases default local node.
   If you renamed the PeopleSoft Enterprise Portal database default local node, use the new node name. This new node name is likely to be the same as your PeopleSoft Enterprise Portal database name.
5. On the Node Definition tab, select Password in the Authentication Option field.
6. Enter `<Node Password>` in the Password field.
   Use the same password that you created in the step “Configuring the Password in the PeopleSoft Portal Database.” On your keyboard, press the TAB key.

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

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

9. Enter both the content URI text and portal URI text values that correspond to the PeopleSoft Enterprise Portal database web server.
   a. The content URI uses the .../psc/... format.
      For example, Content URI Text = http://<someserver>/psc/<site name>/
   b. The portal URI uses the .../psp/... format.
      For example, Portal URI Text = http://<someserver>/psp/<site name>/
      Replace the `<someserver>` value with the hostname of your PeopleSoft Enterprise Portal database web server. Include the port number and network domain name as necessary.
      Replace the `<site name>` value with the directory in which you installed the PeopleSoft web server files for your PeopleSoft Enterprise Portal database. Do not forget to use the trailing "/" character.

10. Click Save.

11. Restart the content provider database web server.

---

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

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

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

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

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

   The Node Definitions Search page appears.

3. Click Search.

4. Select the appropriate portal registry node for the portal definition that you are using.
   The following table lists the portal names and corresponding node names.
5. Select the Portal tab.

6. Enter both the content URI text and portal URI text values that correspond to the PeopleSoft Enterprise Portal database web server.
   a. The content URI uses the …/psc/… format.
      For example, Content URI Text = http://<someserver>/psc/<site name>/
   b. The Portal URI uses the …/psp/… format.
      For example, Portal URI Text = http://<someserver>/psp/<site name>/

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

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

7. Click Save.

8. Restart the content provider database web server.

---

### Task 3-6: Setting Up Common User IDs

To add or update the common user ID VP1:

1. From your browser, sign on to each applicable content provider database to which you want to connect from your PeopleSoft Enterprise Portal database.
   The User Profiles page appears.

2. In the content provider database, Select the PeopleSoft PeopleTools User Profiles page.
   For PeopleSoft 8.4x databases, select PeopleTools, Security, User Profiles, User Profiles.

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

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

5. On the General tab, update the following settings:
   a. If the Symbolic ID field is blank, select the symbolic ID for your database.
   b. In the Password field, enter VP1.
   c. In the Confirm Password field, enter VP1.

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

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

Task 3-7: Testing PeopleSoft Single Sign-On

To test PeopleSoft Single Sign-On:

1. From your browser, sign on to the PeopleSoft Enterprise Portal database.
   The URL uses the following format: http://localhost/pshome/signon.html
2. For each applicable PeopleSoft content provider, select Portal Administration, Test, Single Sign On, <Content Provider> User Profiles.
3. Confirm that the Search dialog box for the User Profile page for that content provider database appears.

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

Task 3-8: Troubleshooting PeopleSoft Single Sign-On

To troubleshoot PeopleSoft Single Sign-On:

1. Check the license code.
   Ensure that the license code is not blank. The WEBLIB functions that are used to access the PeopleSoft Portal Home page require a valid license code.
   Query the database using an SQL query tool by running the following SQL against the database: SELECT LICENSE_CODE FROM PSOPTIONS

2. Check the Message Nodes.
   a. Ensure that the message nodes that exist on multiple PeopleSoft databases are the same.
      This means that the node name, the password, the PeopleSoft PeopleTools release, and the Application Release properties are an exact match in both the PeopleSoft Enterprise Portal and the content provider database.
      Access the 8.4x Message Node definition online by selecting PeopleTools, Portal, Node Definitions.
      Query the database using an SQL query tool by running the following SQL against the database: SELECT * FROM PSMMSGNODEDEFN
   b. Ensure that the PeopleSoft Enterprise Portal database local default message nodes are inserted as trusted into all of the content provider databases that you are accessing by way of PeopleSoft Single Sign-On.
      Verify which Message Nodes are trusted in an 8.4x PeopleSoft PeopleTools database online by selecting PeopleTools, Security, Security Objects, Single Signon.
      Query the database using an SQL query tool by running the following SQL against the database: SELECT * FROM PSTRUSTNODES
   c. Ensure that the content provider message node on the PeopleSoft Enterprise Portal database has the correct Node Type.
      Ensure that the node is active.
      Content provider nodes for databases running on PeopleSoft 8.4x must have a Node Type of PIA.
Verify the node information online by selecting PeopleTools, Portal, Node Definitions.
Select the Node Definition tab to view the Node Type and active status settings.

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

```
SELECT * FROM PSMSGNODEDEFN
```

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

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

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

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

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

3. Verify the content reference URL.

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

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

      Run the following using your SQL query tool:

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

      The URL text for content references running on PeopleSoft 8.4x uses the following format:
`c/Maintain_Security.USERMAINT.GBL?ParamName=ParamValue`

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

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

      Query the database using an SQL query tool by running the following SQL against the database:
```
SELECT * FROM PSNODEURITEXT
```

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

      Verify that the web server name used in the configuration.properties file and the content provider
URI paths use the same capitalization format. This problem manifests itself as a web server error:
"Unable to open page."
4. Verify the local node properties and uses.
   a. Verify the local default node.
      The PORTAL_NAME for the local node must match the default portal in the PeopleSoft Enterprise Portal database. The NODE_TYPE must be PIA.

      Query the database using an SQL query tool by running the following SQL against the database:
      
      ```sql
      SELECT MSGNODENAME, LOCALNODE, LOCALDEFAULTFLG, NODE_TYPE, PORTAL_NAME FROM PSMSGNODEDEFN
      ```

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

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

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

      Query the database using an SQL query tool by running the following SQL against the database:
      
      ```sql
      SELECT * FROM PSPRDMDEFN
      ```

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

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

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

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

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

   To resolve this issue, do one of the following:
   
   a. Move one of the web servers to a different machine.

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

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

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

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

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

   If you are able to access the content provider using the User Profile test links, but your pagelets are not displaying correctly, you must configure the Content and Portal URI text in the content provider database for the Registry Node.
CHAPTER 4

Accessing PeopleSoft Content Providers

This chapter discusses:

- Understanding PeopleSoft Content Provider Access
- Enabling PeopleSoft 8.4x Homepage Personalization (Required)
- Accessing PeopleSoft by Single Link (Recommended)
- Determining PeopleSoft Enterprise Portal Database Default (Required)
- Installing PeopleSoft 8.4x Portal Pack Project (Reference)
- Maintaining Roles and User IDs (Reference)

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

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

Understanding PeopleSoft Content Provider Access

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

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

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

- Required—Perform during the *installation* phase.
  This is required for subsequent tasks, “Enabling PeopleSoft 8.4x Homepage Personalization (Required)” and “Determining PeopleSoft Enterprise Portal Database Default (Required).”
- Recommended—Perform during the *installation* and *implementation* phases.
This indicates the recommended approach and applies to the task, “Accessing PeopleSoft by Single Link (Recommended).”

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

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

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

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

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

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

This section discusses:

- Updating PeopleSoft PeopleTools 8.4x Homepage Security
- Updating the PeopleSoft 8.4x Content Provider GUEST User

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

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

---

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

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

1. Use PeopleSoft Data Mover to sign on to the PeopleSoft PeopleTools 8.4x content provider database.
2. Open the `<PS_HOME>`\scripts\PORTAL_HP_PERS.DMS script that was delivered on the PeopleSoft Enterprise Portal 9.1 CD.
3. Run this script against the PeopleSoft PeopleTools 8.4x content provider database.
4. Open the `<PS_HOME>`\scripts\PORTAL_ADD_ROLE.DMS script that was delivered on the PeopleSoft Enterprise Portal 9.1 CD.
5. Run this script against the PeopleSoft PeopleTools 8.4x content provider database.
6. Close PeopleSoft Data Mover.
Task 4-1-2: Updating the PeopleSoft 8.4x Content Provider GUEST User

To update the PeopleSoft 8.4x content provider GUEST user:

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

1. From your browser, sign on to each applicable PeopleSoft 8.4x content provider database.
3. In the User ID field, enter GUEST or the equivalent guest user ID for the database.
4. Click Search.

   The General page appears.

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

5. Click the Roles tab.
6. Delete the row that contains the PAPP_USER role.
7. Click Save.

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

This section discusses:

- Testing the Single Link to PeopleSoft Content Provider
- Hiding a PeopleSoft Content Provider Single Link

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

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

To test the single link to the PeopleSoft content provider:

1. From your browser, sign on to the PeopleSoft Enterprise Portal database.
2. For each applicable PeopleSoft content provider, select PeopleSoft, <Content Provider>.
3. The single PeopleSoft <Content Provider> link directs you to the PeopleSoft content provider database in the following way:
For PeopleSoft content provider databases on PeopleSoft PeopleTools 8.4x, the <Content Provider> 8.4x link opens a new window that displays the homepage of the PeopleSoft 8.4x Content Provider corresponding portal registry definition.

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

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

To hide a PeopleSoft content provider single link:

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

1. From your browser, sign on to the PeopleSoft Enterprise Portal database.
2. Select PeopleTools, Portal, Structure and Content.
3. Select the PeopleSoft link in the Folder scroll area.
4. Select the Edit link for the Content Reference link that you want to hide.
5. On the Content Ref Administration page, select the Hide from portal navigation option.
6. Click Save.

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

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

To determine the default portal:

1. From your browser, sign on to the PeopleSoft Enterprise Portal database.
3. The Default option is selected for the default portal.
4. Make a note of the PeopleSoft Enterprise Portal database default portal, for use in subsequent tasks in this chapter and the appendixes.
Task 4-4: Installing PeopleSoft 8.4x Portal Pack Project (Reference)

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

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

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

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

See Appendix: Installing PeopleSoft CRM Navigation.

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

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

See Enterprise PeopleTools 8.50 PeopleBook: Security Administration.
Removing PeopleSoft Content Provider Portal Data

This appendix discusses:

• Understanding Content Provider Portal Data Removal
• Creating PeopleSoft Enterprise Portal Registry Delete Project Files
• Deleting Prior PeopleSoft Content Provider Portal Data
• Cleaning the PeopleSoft Enterprise Portal Database
• Accessing Current Release PeopleSoft Content Providers

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

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

Understanding Content Provider Portal Data Removal

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

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

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

• Your PeopleSoft Enterprise Portal database is on Portal Solutions 9.1.
• You have upgraded your content provider database after installing the PeopleSoft Enterprise Portal.
• You have loaded a previous release of the content provider application portal registry data into the PeopleSoft Enterprise Portal database.
Task A-1: Creating PeopleSoft Enterprise Portal Registry Delete Project Files

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

*Note.* There are no corresponding portal permission Delete projects.

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

2. Select File, Open.
3. Open the content provider portal pack and navigation *Copy* projects.

The following table lists copy project naming conventions.

<table>
<thead>
<tr>
<th>Copy Project Naming Conventions</th>
</tr>
</thead>
<tbody>
<tr>
<td>PeopleSoft 8.4x, includes Navigation and Portal Pack in a single project.</td>
</tr>
</tbody>
</table>

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

4. Select File, Save Project As.
5. Rename the Copy project file by adding _DEL to the end of the Copy project name.
   For example, PORTAL_CR84X_EMPL_DEL.
6. Click OK.
7. Remove the permission list and folder registry objects from the project definition.
   You only want to keep content reference objects in the project definition.
8. Select Edit, Upgrade, Set Action for Project, Delete, to change the Action to Delete for all of the content references.
9. Click Save Project.
10. Use the Copy Project to File utility to copy the delete project to file.

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

You must copy the files and folders that you retrieve from My Oracle Support into the respective <PS_HOME>\projects and <PS_HOME>\scripts file directories of your PeopleSoft Enterprise Portal application database. These are the same directories in which you installed the PeopleSoft Enterprise Portal 9.1 CD.
Task A-2: Deleting Prior PeopleSoft Content Provider Portal Data

To copy the portal registry Delete projects:

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

2. Copy only the portal Delete project that corresponds to a previous release of a content provider that you have since upgraded and for which the Portal Registry Delete project name matches the name of a previously copied Portal Registry project.
3. Repeat the following steps for each applicable Delete Portal Project definition.

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

   a. Select Tools, Copy Project, From File.
   b. Select the location where you copied the Delete project.
   c. Click OK.
   d. Select the applicable Portal Registry Delete Project name.
   e. Click Open.
   f. Click Select All.
   g. Click Copy.

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

Task A-3: Cleaning the PeopleSoft Enterprise Portal Database

This section discusses:

- Deleting Obsolete Folders
- Updating Version Numbers

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

Task A-3-1: Deleting Obsolete Folders

To delete obsolete folders:
1. In your target PeopleSoft Enterprise Portal database, select Portal Administration, Navigation, Delete Empty Folders.
2. Add a run control ID of `FOLDER_CLEAN_XXXX`, where `XXXX` represents the portal registry name, such as EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.

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

4. Click Save.

5. Click Run.

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

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

8. Stop the PeopleSoft Enterprise Portal database web server.


**Task A-3-2: Updating Version Numbers**

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

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

**Task A-4: Accessing Current Release PeopleSoft Content Providers**

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

See "Accessing PeopleSoft Content Providers."
Installing PeopleSoft 8.4x Content Provider Data

This appendix discusses:

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

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

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

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

This section discusses:

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

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

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

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

To update the PeopleSoft portal registry permission lists:

1. From your browser, sign on to your PeopleSoft 8.4x content provider database.
3. Add a run control ID of \textit{SECURITY\_SYNC\_XXXXXXXX}, where \textit{XXXXXXXX} represents the portal registry definition name.
   For example, EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.
4. Enter the portal definition name that matches the \textit{XXXXXXXX} of the run control portal registry name.
   For example, EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.
5. Click Save.
6. Click Run.
7. Set up the Process Scheduler information and click OK.
8. Click the Process Monitor link to view the progress of the process.

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

To delete the PeopleSoft 8.4x content provider database cache:
1. Stop the PeopleSoft content provider database web server.
2. Stop the PeopleSoft content provider database application server.
3. Purge the PeopleSoft content provider database application server cache.
4. Start the PeopleSoft content provider database application server.
5. Start the PeopleSoft content provider database web server.

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

This section discusses:

\begin{itemize}
  \item Creating PeopleSoft 8.4x Content Provider Portal Project
  \item Cleaning PeopleSoft 8.4x Content Provider Portal Project
  \item Cleaning PeopleSoft 8.4x in All Other Application Databases
  \item Deleting PeopleSoft 8.4x Content Provider Two-Tier Cache
\end{itemize}

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

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

To create the PeopleSoft 8.4x content provider portal project:
1. Sign on to your PeopleSoft 8.4x content provider database in two-tier mode using PeopleSoft Application Designer.
2. Select File, New.
Appendix B Installing PeopleSoft 8.4x Content Provider Data

3. Select a New Definition value of Project, and then click OK.
4. Select Insert, Definitions into Project.
5. Select a Definition Type value of Permission List, and then click Insert.
6. Click Select All, and then click Insert again.
7. Select the Definition Type value of Portal Registry Definitions, and then click Insert.
8. Select the portal name that matches the PeopleSoft Enterprise Portal database default portal name.
   For example, EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.
9. Highlight the Related Definitions value of Portal Registry Structures, and then click Insert.
10. Click Close.
11. Select File, Save Project As.
12. Enter the applicable project name from the following table of PeopleSoft 8.4x content provider Portal Project names.

<table>
<thead>
<tr>
<th>Content Provider on PeopleSoft PeopleTools 8.4x</th>
<th>PeopleSoft Portal Name</th>
<th>PeopleSoft Project Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM</td>
<td>EMPLOYEE</td>
<td>PORTAL_CR84X_EMPL</td>
</tr>
<tr>
<td>CRM</td>
<td>CUSTOMER</td>
<td>PORTAL_CR84X_CUST</td>
</tr>
<tr>
<td>CRM</td>
<td>PARTNER</td>
<td>PORTAL_CR84X_PART</td>
</tr>
<tr>
<td>ELM</td>
<td>EMPLOYEE</td>
<td>PORTAL_LM84X_EMPL</td>
</tr>
<tr>
<td>EPM</td>
<td>EMPLOYEE</td>
<td>PORTAL_PF84X_EMPL</td>
</tr>
<tr>
<td>FSCM</td>
<td>EMPLOYEE</td>
<td>PORTAL_EP84X_EMPL</td>
</tr>
<tr>
<td>FSCM</td>
<td>CUSTOMER</td>
<td>PORTAL_EP84X_CUST</td>
</tr>
<tr>
<td>FSCM</td>
<td>SUPPLIER</td>
<td>PORTAL_EP84X_SUPP</td>
</tr>
<tr>
<td>HRMS</td>
<td>EMPLOYEE</td>
<td>PORTAL_HC84X_EMPL</td>
</tr>
<tr>
<td>SFO</td>
<td>EMPLOYEE</td>
<td>PORTAL_FO84X_EMPL</td>
</tr>
<tr>
<td>SFO</td>
<td>CUSTOMER</td>
<td>PORTAL_FO84X_CUST</td>
</tr>
</tbody>
</table>

13. Click OK.

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

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

---

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

1. In your PeopleSoft content provider database, select PeopleTools, Portal, Portal Utilities, Clean Portal Project.
2. Add a run control ID of **CLEAN_PORTAL_XXXXXXXX**, where **XXXXXXXX** represents the portal definition name.
   For example, EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.
3. Enter the Project Name that you just created.
   For example: **PORTAL_EP84X_EMPL**.
4. Enter a Portal Name.
   For example: **EMPLOYEE**.
5. Enter a content provider Name.
   For example: **ERP**.
7. Click Save.
8. Click Run.
9. Set up the Process Scheduler information and click OK.
10. Click the Process Monitor link to view the progress of the process.

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

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

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

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

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

<table>
<thead>
<tr>
<th>PeopleSoft Content Provider on PeopleSoft PeopleTools 8.4x</th>
<th>PeopleSoft Portal Name</th>
<th>PeopleSoft Script Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM</td>
<td>EMPLOYEE</td>
<td>PORTAL_CR84X_EMPL_CLEAN.DMS</td>
</tr>
<tr>
<td>CRM</td>
<td>CUSTOMER</td>
<td>PORTAL_CR84X_CUST_CLEAN.DMS</td>
</tr>
<tr>
<td>CRM</td>
<td>PARTNER</td>
<td>PORTAL_CR84X_PART_CLEAN.DMS</td>
</tr>
<tr>
<td>ELM</td>
<td>EMPLOYEE</td>
<td>PORTAL_LM84X_EMPL_CLEAN.DMS</td>
</tr>
<tr>
<td>EPM</td>
<td>EMPLOYEE</td>
<td>PORTAL_PF84X_EMPL_CLEAN.DMS</td>
</tr>
</tbody>
</table>
### PeopleSoft Content Provider on PeopleSoft PeopleTools 8.4x

<table>
<thead>
<tr>
<th>PeopleSoft Portal Name</th>
<th>PeopleSoft Script Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>FSCM</td>
<td>EMPLOYEE PORTAL_EP84X_EMPL_CLEAN.DMS</td>
</tr>
<tr>
<td>FSCM</td>
<td>CUSTOMER PORTAL_EP84X_CUST_CLEAN.DMS</td>
</tr>
<tr>
<td>FSCM</td>
<td>SUPPLIER PORTAL_EP84X_SUPP_CLEAN.DMS</td>
</tr>
<tr>
<td>HRMS</td>
<td>EMPLOYEE PORTAL_HC84X_EMPL_CLEAN.DMS</td>
</tr>
<tr>
<td>SFO</td>
<td>EMPLOYEE PORTAL_FO84X_EMPL_CLEAN.DMS</td>
</tr>
<tr>
<td>SFO</td>
<td>CUSTOMER PORTAL_FO84X_CUST_CLEAN.DMS</td>
</tr>
</tbody>
</table>

2. Use PeopleSoft Data Mover to sign on to the PeopleSoft 8.4x content provider database.
3. From the `<PS_HOME>`\scripts\ directory, open the PeopleSoft Data Mover script that corresponds to the created PeopleSoft 8.4x content provider portal project name in the previous list.
4. Run this script against the PeopleSoft 8.4x content provider database.
5. Close PeopleSoft Data Mover.

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

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

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

1. Start the PeopleSoft 8.4x content provider database Configuration Manager.
2. On the Startup tab, click Purge Cache Directories.
3. Select the PeopleSoft 8.4x content provider database name.
4. Click Delete, click OK, and then click Close.
5. Close Configuration Manager by clicking OK.

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

This section discusses:
- Copying PeopleSoft 8.4x Portal Project to File
- Copying PeopleSoft 8.4x Portal Project from File
- Deleting PeopleSoft Portal Database Cache
Note. If you have copied a previous release content provider portal registry project into your PeopleSoft Enterprise Portal database, you must remove that registry data. See the "Removing PeopleSoft Content Provider Portal Data" appendix in this installation guide for instructions on how to remove the prior release PeopleSoft content provider portal registry data.

See Appendix: Removing PeopleSoft Content Provider Portal Data.

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

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

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

1. Sign on to your PeopleSoft 8.4x content provider database in two-tier mode using PeopleSoft Application Designer.
2. Select File, Open.
3. In the Definition field, select Project.
4. Click Open, highlight the newly created PeopleSoft 8.4x content provider portal project name, and then click Open.
5. Select Tools, Copy Project, To File.
6. Click Browse for the Export Directory. Navigate to a temporary directory, and then click OK.
7. Click Select All.
8. Click Copy.
   This may take a few minutes.

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

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

2. Select Tools, Copy Project, From File.
3. Browse to the PeopleSoft 8.4x content provider database server temporary directory.
   This should be the temporary directory to which you copied the PeopleSoft 8.4x content provider portal project to file in, “Copying Peoplesoft 8.4x Portal Project to File.”
Note. If you cannot access the PeopleSoft 8.4x content provider database server temporary directory, you can copy the PeopleSoft portal project folder and files from the temporary directory to the PeopleSoft Enterprise Portal database server `<PS_HOME>`\Projects directory.

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

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

4. Select the PeopleSoft 8.4x content provider portal project name that you just copied to file.
5. Click Open.
6. Click Select All.
7. Click Options.
   a. On the Copy Options tab, select English and COMMON.
      If your PeopleSoft Enterprise Portal database is a multilingual database, then ensure that you also select the languages that you installed on your PeopleSoft Enterprise Portal database.
   b. Click OK.
8. Click Copy.
9. Review the Output window on the Upgrade tab.
   All objects should copy successfully.

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

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

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

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

1. Stop the PeopleSoft Enterprise Portal database web server.
2. Stop the PeopleSoft Enterprise Portal database application server.
3. Purge the PeopleSoft Enterprise Portal database application server cache.
4. Start the PeopleSoft Enterprise Portal database application server.
5. Start the PeopleSoft Enterprise Portal database web server.
Task B-4: Updating PeopleSoft Portal Registry Permissions

This section discusses:

• Updating PeopleSoft Portal Registry Lists
• Deleting PeopleSoft Portal Database Cache

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

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

To update the PeopleSoft portal registry permission lists:

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

2. Add a run control ID of SECURITY_SYNC_XXXXXXXX, where XXXXXXXX represents the portal registry name.
   For example, EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.
3. Enter the portal name that matches the XXXXXXXX of the run control portal registry name.
   For example, EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER.
4. Click Save.
5. Click Run.
6. Set up the Process Scheduler information and click OK.
7. Select the Process Monitor link to view the progress of the process.

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

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

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

1. Stop the PeopleSoft Enterprise Portal database web server.
2. Stop the PeopleSoft Enterprise Portal database application server.
3. Purge the PeopleSoft Enterprise Portal database application server cache.
4. Start the PeopleSoft Enterprise Portal database application server.
5. Start the PeopleSoft Enterprise Portal database web server.
Task B-5: Updating PeopleSoft Portal Default Homepage

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

To update the PeopleSoft default homepage tab:

1. From your browser, sign on to the PeopleSoft Enterprise Portal database.
2. Select PeopleTools, Portal, Structure and Content.
3. Select Portal Objects, Homepage, Tabs.
4. Click the Edit link for the My Page tab content reference.
5. On the Tab Content tab, select the Include All check box for all pagelet categories, except for the PeopleSoft Applications pagelet category.
6. In the PeopleSoft Applications pagelet category group box, define the following settings:
   a. Clear the Menu pagelet check box.
   b. Select the Enterprise Menu pagelet check box and set the value to Req-Fix.
   c. Select all remaining pagelets check boxes and set their values to Optional.
7. Click Save.
APPENDIX C

Installing PeopleSoft CRM Navigation

This appendix discusses:
• Copying the PeopleSoft CRM_NAVFILTER Project
• Updating PeopleSoft Portal Registry Security
• Updating PeopleSoft Portal Registry Navigation
• Deleting PeopleSoft Portal Database Cache

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

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

See “Accessing PeopleSoft Content Providers” in this installation guide.
See Appendix: Installing PeopleSoft 8.4x Portal Pack and Navigation Projects.

Task C-1: Copying the PeopleSoft CRM_NAVFILTER Project

This section discusses:
• Copying the Project to File
• Copying the Project from File

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

To copy the project to file:
1. Sign on to your currently supported PeopleSoft CRM release on the PeopleSoft PeopleTools 8.4x database in two-tier mode using PeopleSoft Application Designer.
2. Select File, Open.
3. In the Definition field, select Project.
4. Click Open, highlight the project CRM_NAVFILTER, and then click Open.
5. Select Tools, Copy Project, To File.
6. Click Browse for the Export Directory, and then navigate to a temporary directory and click OK.
7. Click Select All.
8. Click Copy.

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

To copy the project from file:

2. Select Tools, Copy Project, From File.
3. Browse to the PeopleSoft 8.4 content provider database server temporary directory.

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

4. Select the PeopleSoft CRM_NAVFILTER project name that you just copied to file.
5. Click Open.
6. Click Select All.
7. Click Options.
   a. On the Copy Options tab, select English and COMMON.
      If your PeopleSoft Enterprise Portal database is a multilingual database, then you must also select the languages that you have installed on your PeopleSoft Enterprise Portal database.
   b. Click OK.
8. Click Copy.
9. View the Output window on the Upgrade tab.
   All objects should copy successfully. Some warning messages such as changed Action from CopyProp to Copy, defn doesn’t exist on target or not copied, entire definition already copied are expected and can be ignored.
10. Change the tablespace name for record RBF_NAV_SRTY.
   a. Open PeopleSoft Application Designer.
   b. Select File, Open.
   c. In the Definition field, select Record, and enter the string RBF_NAV_SRTY in the Name field, and then click Open.
   d. Select Tools, Data Administration, Set Tablespace.
   e. In the Available Space Name-DB Name field, select the item that begins with EOLARGE and click OK.
   f. Select File, Save.
11. Select Build, Project.
12. Select Build Options as Create tables.
13. Select Build Execute Options as Execute SQL now.
14. View the Build Output window to ensure that one record was processed with no errors.
15. Close PeopleSoft Application Designer.

---

## Task C-2: Updating PeopleSoft Portal Registry Security

To update PeopleSoft portal registry security:

1. Copy the PORTAL_CR840/navsrtys.DMS file from the currently supported PeopleSoft CRM release on the PeopleSoft PeopleTools 8.4x database $PS_HOME$/scripts directory to the PeopleSoft Enterprise Portal database $PS_HOME$/scripts directory.
2. Copy the PORTAL_CR840/navsrtys.DAT file from the currently supported PeopleSoft CRM release on the PeopleSoft PeopleTools 8.4x database $PS_HOME$/data directory to the PeopleSoft Enterprise Portal database $PS_HOME$/data directory.
3. Use PeopleSoft Data Mover to sign on to the PeopleSoft Enterprise Portal database in bootstrap mode.
4. Open the $PS_HOME$/scripts\PORTAL_CR840/navsrtys.dms script.
5. Carefully follow the directions as outlined in the PeopleSoft Data Mover script text.
6. If running DB2/OS390, add the following statement after set input and set log and before import *:
   ```
   SET EXECUTE_SQL SET CURRENT SQLID = 'OBJ#OWNER';
   ```
7. Run this script against the PeopleSoft Enterprise Portal database by selecting File, Run Script.
8. View the Output window to ensure that rows have been inserted.
   For customers using PeopleSoft CRM 8.8 or 8.9, 24 rows will be inserted.

---

## Task C-3: Updating PeopleSoft Portal Registry Navigation

To update the PeopleSoft portal registry navigation filter:

1. Copy the PORTAL_CR840/NavFilter.DMS file from the currently supported PeopleSoft CRM release on the PeopleSoft PeopleTools 8.4x database $PS_HOME$/scripts directory to the PeopleSoft Enterprise Portal database $PS_HOME$/scripts directory.
2. Use PeopleSoft Data Mover to sign on to the PeopleSoft Enterprise Portal database.
3. Open the $PS_HOME$/scripts\ PORTAL_CR840/NavFilter.DMS script.
4. Carefully follow the directions as outlined in the PeopleSoft Data Mover script text.
5. Run this script against the PeopleSoft Enterprise Portal database by selecting File, Run Script.
6. Close PeopleSoft Data Mover.
Task C-4: Deleting PeopleSoft Portal Database Cache

To delete the PeopleSoft Enterprise Portal database cache:

1. Stop the PeopleSoft Enterprise Portal database web server.
2. Stop the PeopleSoft Enterprise Portal database application server.
3. Purge the PeopleSoft Enterprise Portal database application server cache.
4. Start the PeopleSoft Enterprise Portal database application server.
5. Start the PeopleSoft Enterprise Portal database web server.
APPENDIX D

Installing Services Procurement Navigation

This appendix discusses:

• Prerequisites
• Understanding Installation Results
• Updating PeopleSoft Portal Registry Security
• Resetting Node for Define Services Procurement
• Deleting PeopleSoft Portal Database Cache

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

Prerequisites

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

Before you begin, you must determine if:

1. Your installation has PeopleSoft Enterprise Project Costing installed.
2. Your installation uses PeopleSoft HCM Terminology in Services Procurement.
3. Your installation uses PeopleSoft Purchase Order integration with Services Procurement.
4. Your installation uses PeopleSoft Supplier Contracts integration with Services Procurement.
5. Your installation is defined to use the Region Tree Structure for defining the Service Region Hierarchy.

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

Run the scripts in the following order:

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

Understanding Installation Results

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

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

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

Task D-1: Updating PeopleSoft Portal Registry Security

To update PeopleSoft portal registry security:

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

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

3. If you have PeopleSoft Project Costing installed, open the <PS_HOME>\scripts\spusepc.dms script.
   
4. Follow the directions outlined in the PeopleSoft Data Mover Script text very carefully.

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

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

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

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

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

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

11. Close PeopleSoft Data Mover.
Task D-2: Resetting Node for Define Services Procurement

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

To reset the node for Define Services Procurement navigation collection:
1. Log on as the system administrator to your PeopleSoft Enterprise Portal database, and then select PeopleTools, Portal, Structure and Content, Services Procurement.
   a. Locate the Define Services Procurement content reference that will have sequence number 0.
   b. Click the Edit link.
2. The Content Reference Administration page displays.
   a. Locate the URL Information group box.
   b. In the Node Name field, enter LOCAL_NODE.
   c. Click Save.
   d. Exit out of the PeopleSoft Enterprise Portal.

Task D-3: Deleting PeopleSoft Portal Database Cache

To delete the PeopleSoft Enterprise Portal database cache:
1. Stop the PeopleSoft Enterprise Portal database web server.
2. Stop the PeopleSoft Enterprise Portal database application server.
3. Purge the PeopleSoft Enterprise Portal database application server cache.
4. Start the PeopleSoft Enterprise Portal database application server.
5. Start the PeopleSoft Enterprise Portal database web server.
APPENDIX E

Creating Content Provider Navigation Collections (Recommended)

This appendix discusses:
• Understanding the Navigation Collections Creation Process
• Determining the Navigation Collection Names
• Determining the Navigation Collection Images
• Creating a Navigation Collection Project
• Copying Navigation Collections to Registries
• Copying Pagelet Wizard Definitions
• Updating Navigation Collection Links to Render Out
• Updating the Collection Page and Pagelet Node
• Updating Pagelet Wizard Definition and Portal Name

Understanding the Navigation Collections Creation Process

Loading the PeopleSoft Enterprise Portal with the content provider registry structures, using the full navigation load, does not include Navigation Collection definitions. This appendix gives a step-by-step guide to import the content provider navigation collections into the PeopleSoft Enterprise Portal, copy them to the created site, and update the navigation collection objects to enable rendering them from the PeopleSoft Enterprise Portal in the created site. The net result is that the Navigation Collection definition and the navigation page from your content provider are maintained in the PeopleSoft Enterprise Portal database, as well as updated in and rendered out of the PeopleSoft Enterprise Portal. The content reference links in the navigation collections are still rendered out of the content provider database.

Note. This appendix assumes that a full navigation load for the portal registry structures has been made from the content provider database into the PeopleSoft Enterprise Portal. This appendix also assumes the full navigation folders have been copied to the created site in the PeopleSoft Enterprise Portal.

The following is an overview of the tasks that are necessary. More explicit directions for each step are given later in the appendix:

1. Determine the name of the Navigation Collection definitions that you want to copy.
2. Create a PeopleSoft Application Designer project in the content provider database that contains the delivered Navigation Collection definition objects and images.
3. Export the project from the content provider database using Copy Project to File.
4. Import the project into the PeopleSoft Enterprise Portal database using Copy Project from File.

5. Copy the delivered Navigation Collection definitions using Structure and Content from the delivered site (for example, EMPLOYEE, CUSTOMER, SUPPLIER) into the created site in the PeopleSoft Enterprise Portal database.

6. Export Pagelet Wizard definitions for Navigation Collection pagelets from the content provider and import them into the PeopleSoft Enterprise Portal using Data Mover.

7. Update the content provider delivered Navigation Collection links (in the PeopleSoft Enterprise Portal) to reference the PeopleSoft Enterprise Portal created site name.

8. Update the content provider delivered Navigation Pages (in the PeopleSoft Enterprise Portal) to render from the PeopleSoft Enterprise Portal, not the content provider.

9. Update the content provider delivered Navigation Pagelets (in the PeopleSoft Enterprise Portal) to render from the PeopleSoft Enterprise Portal, not the content provider.

If you have a development content provider database that has the same navigation collections as your production database, you can perform tasks 1 and 2 from the development database.

If you have a development PeopleSoft Enterprise Portal database that has the same portal names and registry structures as your production database, you can perform tasks 3 through 6 on the development database.

To move the updated navigation collection definitions and navigation pages into your production database, you can create a project that contains these objects in your PeopleSoft Enterprise Portal development database, and then copy that project into your PeopleSoft Enterprise Portal production database.

**Note.** After you copy a project that contains portal registry structures into a database, you must delete the application server cache, and then stop and restart both your web server and the application server.

---

**Task E-1: Determining the Navigation Collection Names**

Before you can determine the Navigation Collection names, you should understand the naming conventions for Navigation Collections objects.

Any collections (along with all related attributes—for example, labels, descriptions, icons, sequencing) can be copied/upgraded using PeopleSoft Application Designer.

The Navigation Collections objects are portal registry structures that are automatically generated by the Navigation Collection utility. These registry structures follow the required naming conventions. It is difficult to distinguish individual collection registry objects by the object name alone, due to the nature of the automatic generation.

The following lists the collection objects and how you can distinguish between them:

- **<pppp>** — This is a two character database prefix, with a maximum of four allowed. For example, PA, HC, EP, CR, and PF. This value is stored on the Portal Utilities System Option page, but is updated to ADMN on shipped databases.

- **<collection name>** — The entered name for the collection upon creation. The label can be changed. The first entry saved is used for the object name and cannot be changed.

- **<unique suffix>** — If the object name already exists in the current portal registry definition, a numeric suffix is appended to make it unique.

- **<datetimestamp>** — The creation system date-time at time to the second, as a string: yyyymmddhhmmss.

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• <random number> — A ten digit random number, suffixed for additional uniqueness.

The following table lists the registry structure, naming convention, reference type, and an example:

<table>
<thead>
<tr>
<th>Registry Structure</th>
<th>Naming Convention</th>
<th>Reference Type</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collection</td>
<td>&lt;pppp&gt;<em>&lt;collection name&gt;</em>&lt;unique suffix&gt;</td>
<td>F</td>
<td>EO_TEST_COLLECTION</td>
</tr>
<tr>
<td>Folder</td>
<td>&lt;pppp&gt;_F&lt;datetimestamp&gt;&lt;random number&gt;</td>
<td>F</td>
<td>EO_F200304251641564103213599</td>
</tr>
<tr>
<td>Content</td>
<td>&lt;pppp&gt;_S&lt;datetimestamp&gt;&lt;random number&gt;</td>
<td>C</td>
<td>EO_S200305061202344545121616</td>
</tr>
<tr>
<td>Published Navigation Page</td>
<td>&lt;pppp&gt;<em>SC_SP</em>&lt;collection name&gt;</td>
<td>C</td>
<td>EO_SC_SP_TEST_COLLECTION</td>
</tr>
<tr>
<td>Published Pagelet Wizard Pagelet</td>
<td>&lt;pppp&gt;_&lt;collection name&gt;_HMPG</td>
<td></td>
<td>EO_TEST_COLLECTION_HMPG</td>
</tr>
<tr>
<td>Published Navigation Collection Pagelet</td>
<td>&lt;pppp&gt;<em>SC_PGT</em>&lt;collection name&gt;</td>
<td></td>
<td>EO_SC_PGT_TEST_COLLECTION</td>
</tr>
</tbody>
</table>

In addition, Navigation Collections can be defined with images that overwrite the default images. These images use the naming convention PS_FN_<image identifier>.

Navigation Collections are stored in the common parent folder CO_NAVIGATION_COLLECTIONS in the portal registry.

To determine the Navigation Collection names:

1. Use a SQL query tool to access the content provider database.
2. Run the following SQL query to retrieve the Navigation Collection names.

   The listed values under the column PORTAL_OBJNAME are the Navigation Collection names. The PORTAL_NAME is where the Navigation Collection resides.

   Replace the string <PREFIX> with the prefix used on delivered content provider’s portal registry structures, for example, HC, EP, CR, PF.

   ```sql
   SELECT PORTAL_NAME, PORTAL_OBJNAME FROM PSPRSMDEFN
   WHERE PORTAL_PRNTOBJNAME = 'CO_NAVIGATION_COLLECTIONS'
   AND PORTAL_REFTYPE = 'F'
   AND PORTAL_OBJNAME LIKE '<PREFIX>%'```

---

**Task E-2: Determining the Navigation Collection Images**

Navigation Collection images are listed as an attribute on the portal registry structure. The attributes are part of the registry structure managed object, however, the image itself is a separate object that must be included in the project definition to be copied.
Note. Navigation images can be listed on the Navigation Collection definition objects as well as on normal portal registry folders. To ensure the same end-user experience, include all images listed on any content reference attribute. Do not include the common PeopleSoft PeopleTools or PeopleSoft Enterprise Components images, since these already exist in the PeopleSoft Enterprise Portal and should not be overwritten.

To determine the Navigation Collection images:

1. Use a SQL query tool to access the content provider database.
2. Run the following SQL query to retrieve the Navigation Collection image names.

   The listed values under the column PORTAL_ATTR_VAL are the image names used on a Navigation Collection object.

   The attribute value is stored as a long char in the database.

   Not all database platforms allow a distinct clause on the fetched column value, so you may get duplicate results from the query.

   Replace the string <PREFIX> with the prefix used on delivered content provider portal registry structures, for example, HC, EP, CR, PF.

```
SELECT PORTAL_ATTR_VAL FROM PSPRSMSYSATTRVL
WHERE PORTAL_ATTR_NAM = 'PTPP_IMAGE'
AND PORTAL_OBJNAME LIKE '<PREFIX>%'
```

Task E-3: Creating a Navigation Collection Project

To create a navigation collection project:

1. Log on to your PeopleSoft content provider database in two-tier.
2. Open PeopleSoft Application Designer and select File, New.
3. Select Project as the new definition. Click OK.
4. Select Insert, Definitions into Project.
5. Select the Definition Type of Portal Registry Structures.
6. Enter the Portal Name where the Navigation Collection resides.
   Enter the content provider portal registry prefix to limit the results. Click Enter.
7. Scan the results for the folder that matches your collection name, and then click the collection object name.
8. Click Include Children in the Related Definitions.
9. Click Insert.
10. Click Close.
11. Review your results by clicking on the Application Designer Upgrade tab and double-clicking the Portal Registry Structures object type.
12. Select Insert, Definitions into Project.
13. Select the Definition Type of Images.
14. Enter the Navigation Collection prefix PS_FN to limit the results, and then click Enter.
15. Scan the results for the image names that match your Navigation Collection image names. These are the names that were returned in the PORTAL_ATTR_VAL column in the previous task.
16. Click the image name and then click Insert. Repeat for each image name that you want to include in the project, and then click Close.
17. Select File, Save Project As, and specify a project name.
18. Select Tools, Copy Project, To File…

   **Note.** If your content provider and PeopleSoft Enterprise Portal database is on the same PeopleSoft PeopleTools release, you can do a direct Copy Project, To Database…

20. Select File, New. For the Definition Type, select *Project*. Click OK.
21. Select Tools, Copy Project, From File…
22. Select the Navigation Collection project that you just copied to file.
23. Click Open.
24. Click Select All.
25. Click Options.
   a. On the Copy Options tab, select English and COMMON.

      If your PeopleSoft Enterprise Portal database is a multilingual database, then you must also select the languages that you have installed on your PeopleSoft Enterprise Portal database.
   b. Click OK.
26. Click Copy.
27. Review the Output window on the Upgrade tab.

   All objects should copy successfully.

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

**Note.** After you copy a project that contains portal registry structures into a database, you must delete the application server cache and stop and restart both your application server and web server for the target database.

---

### Task E-4: Copying Navigation Collections to Registries

To access Navigation Collections in a delivered PeopleSoft portal registry from the PeopleSoft Enterprise Portal created site, you must copy the Navigation Collection definitions to the new site.

To copy Navigation Collections to a different portal registry:

1. From your browser, sign on to the PeopleSoft Enterprise Portal database.
Note. To access portal registries other than the default EMPLOYEE Portal, adjust the browser address to the desired registry name.

For example, replace /EMPLOYEE/ with /CUSTOMER/ or /SUPPLIER/.

2. Select PeopleTools, Portal, Structure and Content.
3. In the Structure and Content page, click the Portal Objects link.
4. In the Portal Objects Structure and Content page, click the Navigation Collections link.
5. Repeat the following for each Navigation Collection that you want to access as a Navigation page from the PeopleSoft Enterprise Portal.
   a. In the Navigation Collections Structure and Content page, click the Edit link next to the Navigation Collection folder label.
   b. In the Folder Administration page on the navigation collection, click Copy Object.
   c. In the Copy Object to a Different Portal Registry page, select the Recurse subfolders check box.
   d. Click the tree folder icons to <My New Site> (for example, HRSITE.), and then select Portal Objects, Navigation Collections. Click the Navigation Collections folder link in the tree list.

   Copy Object To a Different Portal Registry

   Object to Copy: Time and Labor Setup Center

   Click the registry name you wish to copy this object to and pick a parent folder to copy it under.

   Click “Cancel” to exit and not copy the current object.

   Copy Object page

   e. In the Copy Confirmation page, click Yes – Copy.
   f. In the Save Confirmation page, click OK.
   g. In the Copy Object to a Different Portal Registry page, click the Navigation Collections link to return to the Structure and Content page. Click the Cancel button to continue on the popup message.

6. Repeat step 5 for any additional Navigation Collections definitions.
Task E-5: Copying Pagelet Wizard Definitions

To access Navigation Collection Pagelets in a delivered portal registry from the Enterprise Portal created site, you must move the Navigation Collection Pagelet definitions to the new site. Use the following steps to copy pagelet wizard definitions if the PeopleSoft content provider database and the PeopleSoft Enterprise Portal database are running on the same version of PeopleSoft PeopleTools.

If the PeopleSoft content provider database and the PeopleSoft Enterprise Portal database are not running the same version of PeopleSoft PeopleTools, you must manually create these pagelets in the PeopleSoft Enterprise Portal created site.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology* "Working with Navigation Pages" and “Using Pagelet Wizard."

To copy pagelet wizard definitions:

1. From your browser, sign on to the content provider database.
3. For the data type, select Navigation Collection.
4. Click *Search*.
5. Select the content provider Pagelet Wizard pagelet definitions that you want to copy.
   The Pagelet ID should begin with the content provider prefix, but is not required to do so.
6. Click Generate Scripts.
7. Log on to PeopleSoft Data Mover for the content provider database.
8. Copy and paste the entire generated export script text into PeopleSoft Data Mover and run the script.
9. Copy the resulting .dat file to the PeopleSoft Data Mover Input Directory for the PeopleSoft Enterprise Portal database, as defined in the PeopleSoft Configuration Manager.
10. Log on to PeopleSoft Data Mover for the PeopleSoft Enterprise Portal database.
11. Copy and paste the entire generated import script text into PeopleSoft Data Mover and run the script.

Task E-6: Updating Navigation Collection Links to Render Out

To update the Navigation Collection Link Portal:

*Note.* The copied content provider Navigation Collection links are *likely* defined to render from the portal where they were created. The link portal name must be set to render out of the current portal, instead of the original portal name.

1. Use a SQL query/update tool to access the PeopleSoft Enterprise Portal database.
2. Run the following SQL query statement to check the rows that you will be updating.

   Replace the string `<MY_NEW_SITE>` with the portal name of the site created.

   Replace the string `<PREFIX>` with the prefix used on delivered content provider portal registry structures, for example, HC, EP, CR, PF.
Task E-7: Updating the Collection Page and Pagelet Node

To update the Navigation Collection page and PeopleSoft pagelet content provider node:

Note. The content provider Navigation pages and pagelets are delivered to render out of the content provider database. This is determined by the content reference node name. Since the full navigation exists in the new site, you must set the published navigation pages and pagelets to render out of the PeopleSoft Enterprise Portal database, not the PeopleSoft content provider.

1. Use a SQL query and update tool to access the PeopleSoft Enterprise Portal database.
2. Run the following SQL query statement to check the rows that you will be updating.
   Replace the string `<MY_NEW_SITE>` with the portal name of the site created.
   Replace the string `<PREFIX>` with the prefix used on delivered PeopleSoft Portal registry objects.
   For example, HC, EP, CR, PF.

   ```sql
   SELECT * FROM PSPRSMDEFN
   WHERE PORTAL_NAME = '<MY_NEW_SITE>'
   AND PORTAL_OBJNAME LIKE '<PREFIX>%'
   AND PORTAL_PRODUCT = 'CFAN'
   AND PORTAL_CREF_USGT = 'LINK'
   ```

3. Run the following SQL update statement to update the published Navigation page.
   Replace the string `<MY_NEW_SITE>` with the portal name of the site created.
   Replace the string `<PREFIX>` with the prefix used on delivered PeopleSoft Portal registry objects.

   ```sql
   UPDATE PSPRSMDEFN SET PORTAL_LINK_PORTAL = PORTAL_NAME
   WHERE PORTAL_NAME = '<MY_NEW_SITE>'
   AND PORTAL_OBJNAME LIKE '<PREFIX>%'
   AND PORTAL_PRODUCT = 'CFAN'
   AND PORTAL_CREF_USGT = 'LINK'
   ```
For example, HC, EP, CR.

```sql
UPDATE PSPRSMDEFN SET PORTAL_CNTPRV_NAM = 'LOCAL_NODE'
WHERE PORTAL_NAME = '<MY_NEW_SITE>'
AND PORTAL_OBJNAME LIKE '<PREFIX>%'
AND PORTAL_PRODUCT = 'CFAN'
AND PORTAL_CREF_USGT <> 'LINK'
AND PORTAL_REFTYPE = 'C'
```

**Note.** After you update the PeopleSoft portal registry structures, you must delete the application server cache, and then stop and restart both your web server and your application server.

---

**Task E-8: Updating Pagelet Wizard Definition and Portal Name**

To update the Pagelet Wizard definition Navigation Collection portal name:

**Note.** The Pagelet Wizard definition stores the Navigation Collection name and portal name to determine which Navigation Collection to render. This information is stored in Pagelet Wizard data settings and parameters. The copied PeopleSoft content provider Pagelet Wizard definitions are likely defined to render from the portal where they were created. The portal name must be set to render out of the current portal, instead of the original portal name.

1. Use a SQL query and update tool to access the PeopleSoft Enterprise Portal database.
2. Run the following SQL query statements to check the rows that you will be updating.
   - Review the results to see that they match the PageletIDs in the generated export script.
   - Replace the string `<PREFIX>` with the prefix used on delivered PeopleSoft Portal registry objects.
   - For example, HC, EP, CR, PF.

   ```sql
   SELECT * FROM PS_PTPPB_DS_SETTGS
   WHERE PTPPB_FIELDNAME = 'PortalName'
   AND EXISTS
   (SELECT 'X' FROM PS_PTPPB_DS_SETTGS A
   WHERE A.PTPPB_PAGELET_ID = PS_PTPPB_DS_SETTGS.PTPPB_PAGELET_ID
   AND A.PTPPB_FIELDNAME = 'scname'
   AND A.PTPPB_VALUE LIKE '<PREFIX>%')

   SELECT * FROM PS_PTPPB_PGLT_PRMS
   WHERE PTPPB_FIELDNAME = 'PortalName'
   AND EXISTS
   (SELECT 'X' FROM PS_PTPPB_PGLT_PRMS A
   WHERE A.PTPPB_PAGELET_ID = PS_PTPPB_PGLT_PRMS.PTPPB_PAGELET_ID
   AND A.PTPPB_FIELDNAME = 'scname'
   AND A.PTPPB_VALUE LIKE '<PREFIX>%')
   ```

3. Run the following SQL update statements to update the Pagelet Wizard data setting and parameter for the PortalName value.
Replace the string `<PREFIX>` with the prefix that was used on the delivered PeopleSoft Portal registry objects.

For example, HC, EP, CR, PF.

```
UPDATE PS_PTPPB_DS_SETTGS
SET PTPPB_VALUE='LOCAL_PORTAL'
WHERE PTPPB_FIELDNAME = 'PortalName'
AND EXISTS
(SELECT 'X' FROM PS_PTPPB_DS_SETTGS A
WHERE A.PTPPB_PAGELET_ID = PS_PTPPB_DS_SETTGS.PTPPB_PAGELET_ID
AND A.PTPPB_FIELDNAME = 'scname'
AND A.PTPPB_VALUE LIKE 'HC_%')
```

```
UPDATE PS_PTPPB_PGLT_PRMS
SET PTPPB_VALUE='LOCAL_PORTAL'
WHERE PTPPB_FIELDNAME = 'PortalName'
AND EXISTS
(SELECT 'X' FROM PS_PTPPB_PGLT_PRMS A
WHERE A.PTPPB_PAGELET_ID = PS_PTPPB_PGLT_PRMS.PTPPB_PAGELET_ID
AND A.PTPPB_FIELDNAME = 'scname'
AND A.PTPPB_VALUE LIKE 'HC_%')
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<tr>
<td>updating</td>
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<tr>
<td>8.4x portal pack projects</td>
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<tr>
<td>portal default homepage</td>
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<td>portal registry navigation</td>
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<td>portal registry security</td>
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<td>services procurement portal registry security</td>
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<tr>
<td>user IDs and roles, maintaining</td>
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<tr>
<td>using E-Delivery</td>
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<tbody>
<tr>
<td>web folder directory, extending</td>
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<tr>
<td>web server</td>
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<tr>
<td>copying demo folders</td>
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<tr>
<td>copying files</td>
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<tr>
<td>web server, setting up</td>
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