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Using Oracle VM Templates for PeopleSoft Enterprise Financials and Supply Chain Management 9.1

April 2011

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Using Oracle VM Templates for
PeopleSoft Enterprise Financials and Supply Chain Management 9.1
SKU iovm_fscm91_fscm91ovm_042211

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About this Documentation

This preface discusses:

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

Understanding this Documentation

This documentation is designed to guide you through the deployment of the Oracle® VM templates for Oracle's PeopleSoft Enterprise Financial Management and Supply Chain Management. It is not a substitute for the documentation provided for Oracle® VM Server or Oracle® VM Manager.

Audience

This documentation is intended for individuals responsible for deploying templates for Oracle's PeopleSoft Enterprise Financial Management and Supply Chain Management with Oracle VM Manager and Oracle VM Server. You should have a basic understanding of virtual machines. You should have a basic understanding of the PeopleSoft system.

Typographical Conventions

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

Convention	Description
`Monospace`	Indicates a PeopleCode program or other code, such as scripts that you run during the install. Monospace is also used for messages that you may receive during the install process.

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Convention	Description
Italics	Indicates field values, emphasis, and book-length publication titles. Italics is also used to refer to words as words or letters as letters, as in the following example: Enter the letter *O*. Italics are also used to indicate user-supplied information. For example, the term *domain* is used as a placeholder for the actual domain name in the user's environment. When two such placeholders are used together, they may be set apart with angle brackets. For example, the path <*PS_CFG_HOME*>/appserv/<*domain*> includes two placeholders that require user-supplied information.
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or page.
lower case	File or directory names are represented in lower case, unless they appear otherwise on the interface.
Menu, Page	A comma (,) between menu and page references indicates that the page exists on the menu. For example, "Select Use, Process Definitions" indicates that you can select the Process Definitions page from the Use menu.
Cross-references	Cross-references that begin with *See* refer you to additional documentation that will help you implement the task at hand. We highly recommend that you reference this documentation. Cross-references under the heading *See Also* refer you to additional documentation that has more information regarding the subject.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meaning.
Note. Note text.	Text that begins with *Note.* indicates information that you should pay particular attention to as you work with your PeopleSoft system.
Important! Important note text.	A note that begins with *Important!* is crucial and includes information about what you need to do for the system to function properly.
Warning! Warning text.	A note that begins with *Warning!* contains critical configuration information or implementation considerations; for example, if there is a chance of losing or corrupting data. Pay close attention to warning messages.

Products

This documentation may refer to these products and product families:

- Oracle® Database
- Oracle® Tuxedo

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- Oracle® VM Manager
- Oracle® VM Server
- Oracle® WebLogic Server
- Oracle's PeopleSoft Application Designer
- Oracle's PeopleSoft Enterprise Financial Management
- Oracle's PeopleSoft Enterprise PeopleTools
- Oracle's PeopleSoft Enterprise Supply Chain Management
- Oracle's PeopleSoft Process Scheduler
- Micro Focus® Server Express™
- Verity, Incorporated's Verity®

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

Related Information

You can find several sources of reference information about PeopleSoft PeopleTools and your particular PeopleSoft application. You can access PeopleBooks for the current release of PeopleSoft PeopleTools and PeopleSoft applications at the Hosted PeopleBooks site. You can also find installation guides and other information by searching for the product name and release number on My Oracle Support.

- Oracle PeopleSoft Enterprise Hosted PeopleBooks. This page includes links to the most recent documentation for PeopleSoft PeopleTools and PeopleSoft applications.

  See Oracle PeopleSoft Enterprise Hosted PeopleBooks, http://www.oracle.com/pls/psfthomepage./homepage

- Enterprise PeopleTools 8.51 PeopleBook: Getting Started with PeopleTools for your release. This documentation provides a high-level introduction to PeopleTools technology and usage.

  See Oracle PeopleSoft Enterprise Hosted PeopleBooks, PeopleTools Release 8.51 (PT), http://www.oracle.com/pls/psfthomepage./homepage

- My Oracle Support. This support platform requires a user account to log in. Contact your PeopleSoft representative for information.

  To locate documentation on My Oracle Support, search for the title and select PeopleSoft Enterprise to filter the results.

  See My Oracle Support, https://support.oracle.com

- Enterprise PeopleTools 8.51 Installation for Oracle. This documentation provides instructions for installing PeopleSoft PeopleTools 8.51 on an Oracle RDBMS (using the traditional method).

  See My Oracle Support, (search for title).

- 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.

  See My Oracle Support, (search for title).

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- PeopleSoft Enterprise Financials/Supply Chain Management 9.1 Installation guide. This documentation provides application-specific installation instructions for FSCM.

  See My Oracle Support, (search for title).

For information on Oracle VM Manager and Oracle VM Server, see the following documentation:

See http://download.oracle.com/docs/cd/E11081_01/welcome.html

- Oracle VM Server Quick-Start Guide
- Oracle VM Manager Installation Guide
- Oracle VM Manager Release Notes
- Oracle VM Manager User's Guide
- Oracle VM Server Installation Guide
- Oracle VM Server Release Notes
- Oracle VM Server User's Guide

Comments and Suggestions

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CHAPTER 1

Preparing to Deploy

This chapter discusses:

- Understanding Oracle VM and the PeopleSoft Deployment
- Obtaining Oracle VM for PeopleSoft Enterprise Templates from Oracle E-Delivery
- Planning the PeopleSoft Template Deployment
- Reviewing the Oracle VM Setup

Understanding Oracle VM and the PeopleSoft Deployment

This documentation explains how to deploy the Oracle VM templates for PeopleSoft Financial Management and Supply Chain Management (FSCM) 9.1. PeopleSoft FSCM 9.1 deployment requires two Oracle VM templates. The Oracle VM templates for FSCM include the following features:

- Database template
  - PeopleSoft FSCM 9.1 application software, including the demo database, built on Oracle 11g RDBMS database software
  - Oracle Enterprise Linux (OEL) 5.2x operating system
- PIA-AppBatch template
  - PeopleSoft Pure Internet Architecture built with Oracle WebLogic 10.3.1 web server
  - Application Server configured using a PeopleSoft small domain configuration.
  - Process Scheduler with a default UNIX configuration
  - Oracle Tuxedo 10gR3 and Verity included
  - Micro Focus Server Express COBOL install binaries

See Obtaining Oracle VM for PeopleSoft Enterprise Templates from Oracle E-Delivery.

Before deploying the PeopleSoft templates, you must install Oracle VM Server and Oracle VM Manager. The hardware and software requirements for this deployment are the same as those for Oracle VM Server and Oracle VM Manager.

See Reviewing the Oracle VM Setup.

The deployment requires users with the following roles:

- Oracle VM Administrator

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The Oracle VM Administrator is responsible for management of the Oracle VM server pool and user accounts, including the user accounts for the PeopleSoft domain and installation administrators. The Oracle VM Administrator is authorized to create virtual machines and assign hardware resources to a virtual machine. The Oracle VM administrator should have root access on the Oracle VM Server machine.

- PeopleSoft Domain and Installation Administrators

  The users managing the PeopleSoft PeopleTools environment should be familiar with PeopleSoft software administration. The user can be local to the virtual machine or a domain user. This user only has access to the resources assigned by the Oracle VM Administrator.

While these are listed as separate roles, both sets of skills are needed to complete the deployment process in very close coordination.

Task 1-1: Obtaining Oracle VM for PeopleSoft Enterprise Templates from Oracle E-Delivery

You should have already downloaded the necessary files from Oracle E-Delivery before beginning this procedure. This section includes additional information on finding and using Oracle VM templates for PeopleSoft Enterprise if necessary.

To obtain the Oracle VM templates for FSCM:

1. Log in to the Oracle E-Delivery web site for Enterprise Linux and Oracle VM.

   See http://edelivery.oracle.com/EPD/GetUserInfo/get_form?caller=LinuxWelcome

2. On the Media Pack Search page, select Oracle VM templates from the Select a Product Pack drop-down list.

   Select the operating system you are running on from the Platform drop-down list, and click Go.

3. Select the radio button for PeopleSoft VM Templates for FSCM 9.1 Release Media Pack for x86 (64 bit), and click Continue.

4. Download the following templates, and save the zip files to a temporary directory:

   - PeopleSoft FSCM 9.1 database with Oracle Enterprise Linux 5.2x.

     This template is referred to as the “Database template” in this documentation.

   - PeopleSoft PIA, Application and Batch server with PeopleSoft Pure Internet Architecture, WebLogic 10.3.1, Tuxedo 10gR3, and Verity.

     This template is referred to as the “PIA-AppBatch template” in this documentation.

5. Click Readme for information on how to extract the zip files and prepare for use.

6. Create a directory for the templates on the Oracle VM Server, and FTP the templates into the directory:

   /OVS/seed_pool/*TEMPLATE_NAME*.

   Follow the instructions given in the Readme file concerning the directory name. The Readme file is posted with the templates, and as such is more current than this documentation. It is convenient to use the template name for the directory; this documentation uses *TEMPLATE_NAME*.

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Note. If /OVS is a mounted filesystem, after unzipping and before extracting the files you may see messages similar to the following. You can ignore these messages and continue.

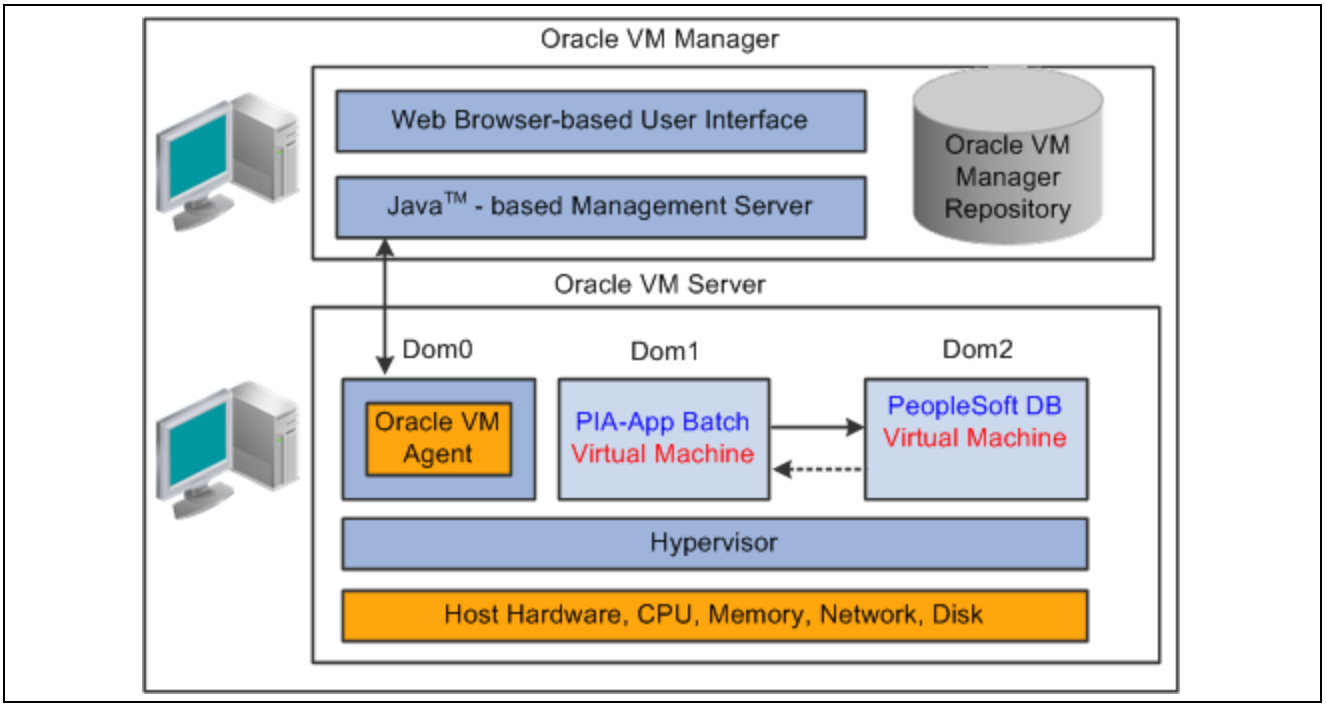
```
-bash-3.1# tar -xvf OVM_EL5U2_X86_64_FSCMDB_9_1_FP1_PVM.tgz
oracle11g_x86_64_asm.img
tar: oracle11g_x86_64_asm.img: Cannot change ownership to uid 0, gid 0:
 Operation not permitted FSCMDB.img
tar: FSCMDB.img: Cannot change ownership to uid 0, gid 0:
 Operation not permitted README
tar: README: Cannot change ownership to uid 0, gid 0:
 Operation not permitted System.img
tar: System.img: Cannot change ownership to uid 0, gid 0:
 Operation not permitted vm.cfg
tar: vm.cfg: Cannot change ownership to uid 0, gid 0:
 Operation not permitted
tar: Error exit delayed from previous errors
```

Task 1-2: Planning the PeopleSoft Template Deployment

The following diagram shows a sample Oracle VM architecture with the Oracle VM templates for PeopleSoft deployed. In this case, both PeopleSoft templates are deployed in a single server pool on a single Oracle VM server, but other server pool configurations are possible. A server pool is an autonomous region that contains one or more Oracle VM Servers.

See *Oracle VM Manager User's Guide,* "Overview of Oracle VM Manager"

The following diagram shows the Oracle VM architecture with the two deployed PeopleSoft templates. The components represented in the following diagram are defined below the diagram:



Sample Oracle VM architecture with deployed PeopleSoft templates

- Oracle VM Manager

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The Oracle VM Manager is a web application that provides the user interface to manage Oracle VM Server, virtual machines, and resources.

- Oracle VM Server

  The Oracle VM Server is a self-contained virtualization environment designed to provide a lightweight, secure, server-based platform to run virtual machines. Oracle VM Server is based upon an updated version of the underlying Xen hypervisor technology, and includes Oracle VM Agent.

- Oracle VM Agent

  Oracle VM Agent is installed with Oracle VM Server. It communicates with Oracle VM Manager to manage virtual machines.

- dom0

  This is an abbreviation for domain zero, which is the management domain with privileged access.

- dom*U*

  Each dom*U* (dom1, dom2, dom3) is an unprivileged Oracle VM domain with no direct access to the hardware or device drivers. Each domU is started by Oracle VM Server in dom0. In this example, each domain holds a single PeopleSoft virtual machine.

In planning the deployment, consider the following:

- In addition to the Oracle VM components discussed above, you need a utility to access and control the virtual machines in a console. You can consult the Oracle VM documentation for information on downloading a plug-in, or use a VNC client of your own choosing.

  See *Oracle VM Manager User's Guide,* "Connecting to a Virtual Machine's Console."

- After setting up the virtual machines you will need to use a secure shell (SSH) client to log in to the virtual machines.

- The delivered Oracle VM for FSCM templates include a PeopleSoft FSCM 9.1 demo database. Features that require third-party licenses, such as SAP® BusinessObjects Crystal Reports® or SAP® BusinessObjects™ Enterprise, are not supported. Other information is given in a later task.

  See "Deploying the PeopleSoft Templates," Configuring FSCM Products.

  See "Licensing Notes for Oracle's PeopleTools 8.51," My Oracle Support (search for the article name).

- If you plan to use any products that require COBOL, such as Oracle's PeopleSoft General Ledger, Inventory, Cost Management, or Manufacturing, be aware that you must have a properly licensed and installed Micro Focus COBOL compiler.

  See "Deploying the PeopleSoft Templates," Starting the PIA-AppBatch Virtual Machine.

  See "PeopleSoft Enterprise Frequently Asked Questions About PeopleSoft and the Micro Focus COBOL Compiler," My Oracle Support, (search for the article name).

  See *PeopleSoft Enterprise FSCM 9.1 Installation,* My Oracle support (search for the application and release).

- Decide how to distribute the templates. The example in the previous section shows both templates in a single server pool, but your environment may favor the database template in one server pool, and the PIA-AppBatch template in another.

- It is possible to combine a deployed PeopleSoft template with a conventional installation.

  For example, if you deploy the PIA-AppBatch template, you can connect to a traditional, non-virtual database instance.

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- The environment installed by the deployment of the Oracle VM for FSCM templates can be used as a starting point that can subsequently be enhanced and tuned to fit the requirements of the target system.

  See "Deploying the PeopleSoft Templates," Managing the Virtual Environment Lifecycle.

- To avoid potential conflicts, the Oracle VM Administrator should keep careful record of the host names and IP addresses associated with the virtual machines.

Task 1-3: Reviewing the Oracle VM Setup

Before you begin the Oracle VM for FSCM template deployment, the Oracle VM Administrator should have completed the following tasks:

- Downloaded the Oracle VM Server and Oracle VM Manager installation software from Oracle E-Delivery.
- Installed Oracle VM Server and Oracle VM Manager software.

  See *Oracle VM Server Installation Guide.*

  See *Oracle VM Manager Installation Guide.*
- Set up a server pool.

  See *Oracle VM Manager User's Guide.*
- Set up a server.

  See *Oracle VM Manager User's Guide.*
- Recorded, and if necessary, communicated information such as hostnames, IP addresses, and other access information, to the user who will deploy the templates.

You should give due consideration to the best server pool configuration for your system. For example, you can create different virtual machines for the PIA-AppBatch and Database templates, on different physical servers, and put them into the same server pool. The Oracle VM documentation includes guidance on designing your system.

See *Oracle VM Manager User's Guide,* "Managing Server Pools."

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CHAPTER 2

Deploying the PeopleSoft Templates

This chapter discusses:

- Importing Oracle VM for PeopleSoft Enterprise Templates
- Creating the Virtual Machines
- Starting the Oracle VM for PeopleSoft Enterprise Virtual Machines
- Using the PeopleSoft Installation
- Configuring FSCM
- Troubleshooting
- Managing the Virtual Environment Lifecycle

Task 2-1: Importing Oracle VM for PeopleSoft Enterprise Templates

There are several methods of importing virtual machines templates. This section assumes that you downloaded the Oracle VM for PeopleSoft Enterprise templates from Oracle E-Delivery, extracted the two templates, and saved them in /OVS/seed_pool/*TEMPLATE_NAME* on the computer where you set up your Oracle VM server pool. Carry out the procedure described here for each of the templates you downloaded.

Use the examples shown here for information, but keep in mind that there may be slight differences in appearance due to different browsers and so on.

See "Preparing to Deploy," Obtaining the Oracle VM for PeopleSoft Enterprise Templates from Oracle E-Delivery.

For other methods of importing templates, see the *Oracle VM Manager User's Guide*.

To import the virtual machine template that you downloaded previously, and register it in Oracle VM Manager:

1. Launch the Oracle VM Manager in a browser and log in.

   Log in with a user account that has the permissions to import templates and create virtual machines.

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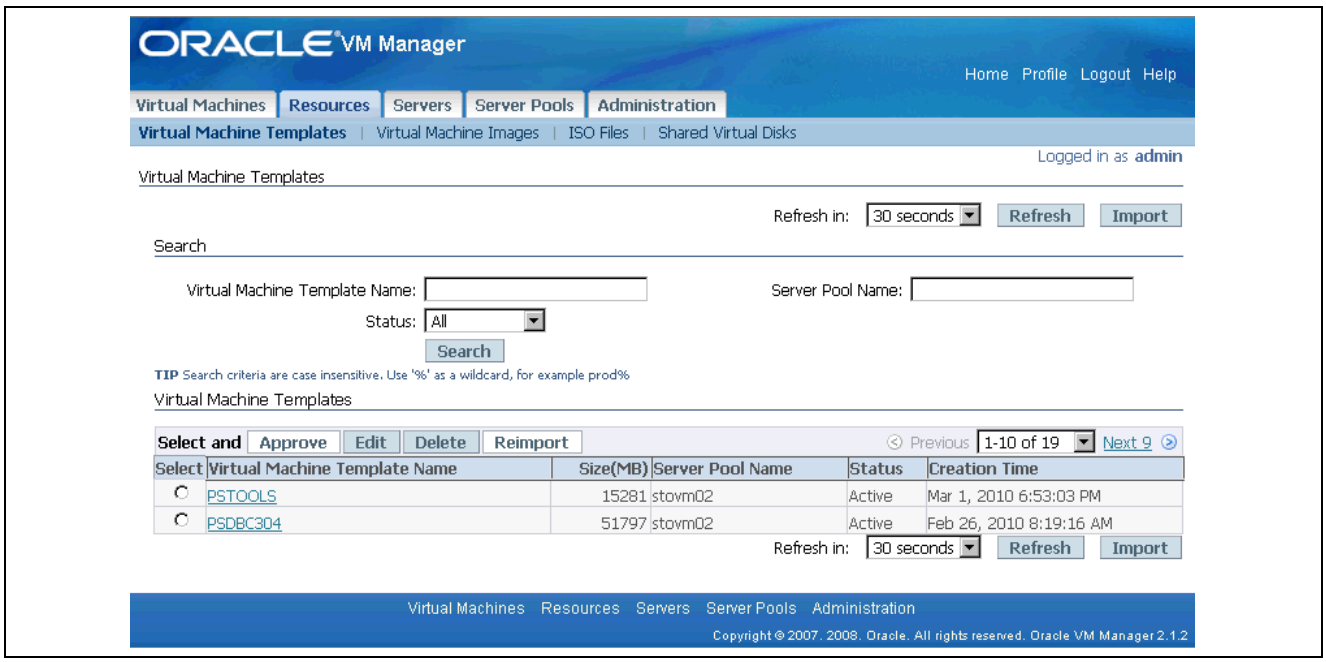
Oracle VM Manager Login

2. Select the Resources tab.
3. Click Virtual Machines Templates, and then click the Import button.



Oracle VM Manager Resources page

4. On the Source page, select the option Select from Server Pool (Discover and register), and then click Next.

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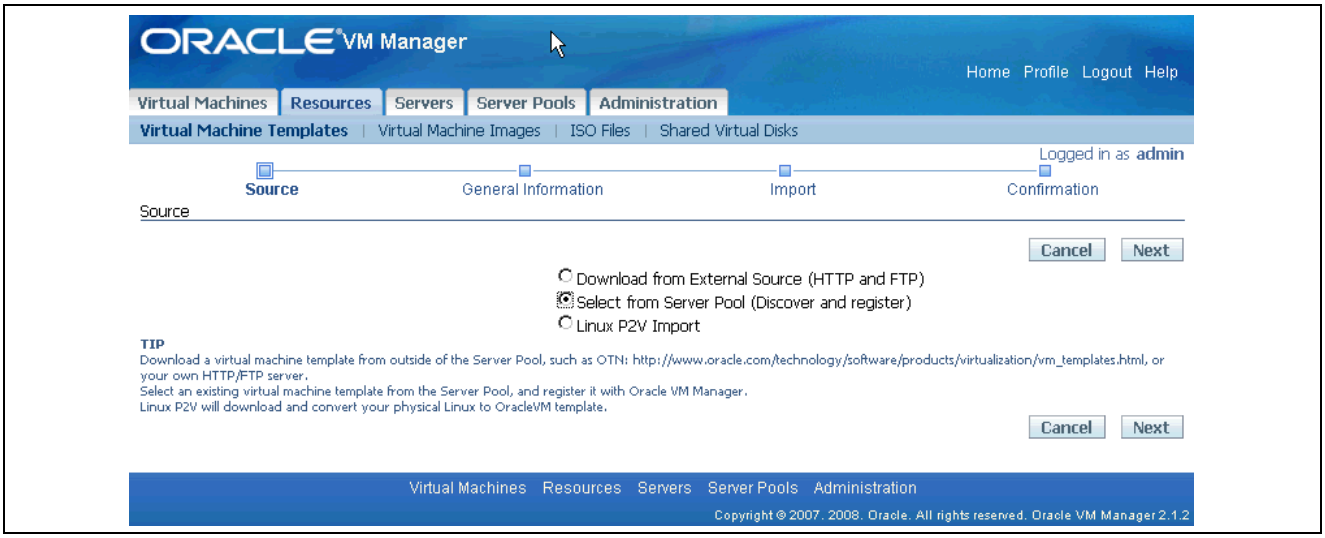
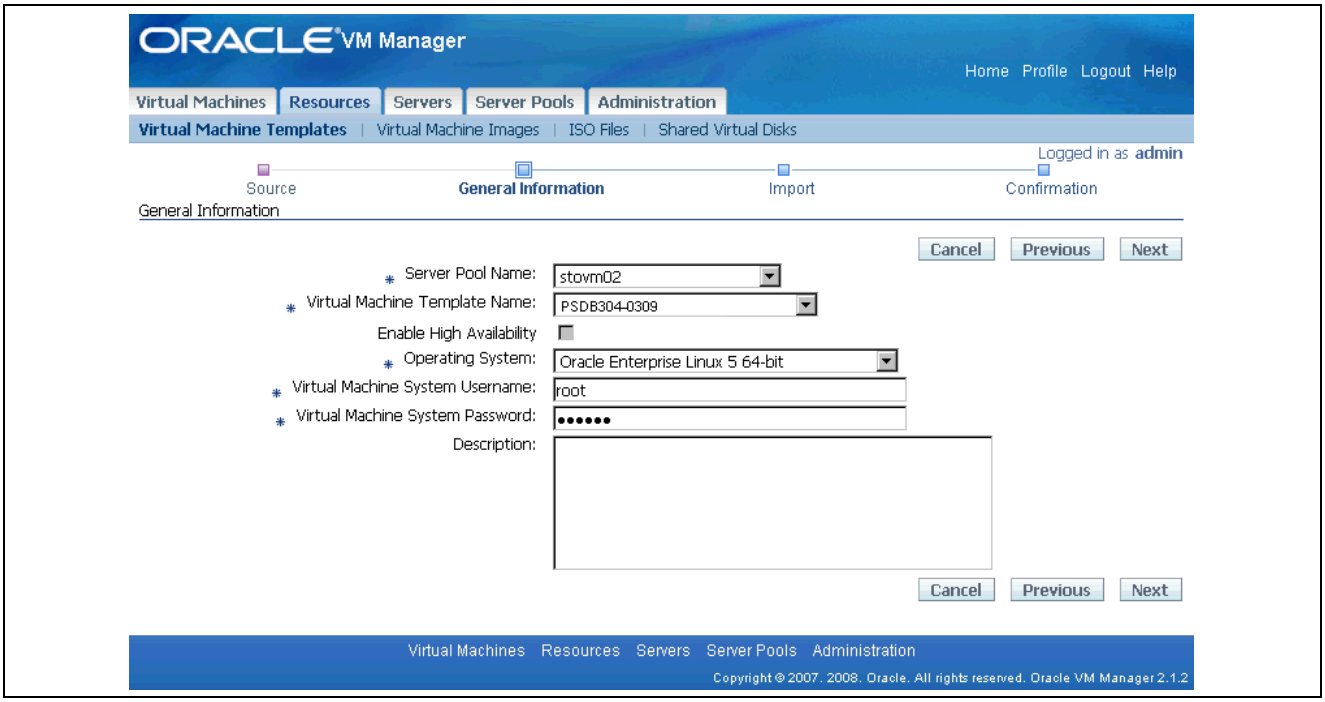


Specifying the virtual machine templates source

5. On the General Information page, enter or select the following general information:



General information page

- Server Pool Name

  Select the server pool on which the imported virtual machine template will be located.

- Virtual Machine Template Name

  Select the virtual machine template to be imported.

- Enable High Availability (Optional)

  You can enable high availability for the imported virtual machine template.

  See *Oracle VM Manager User's Guide,* "Managing Server Pools."

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- Operating System

  Enter *Oracle Enterprise Linux 5.2x 64-bit* as the guest operating system of the virtual machine template.

- Virtual Machine System Username

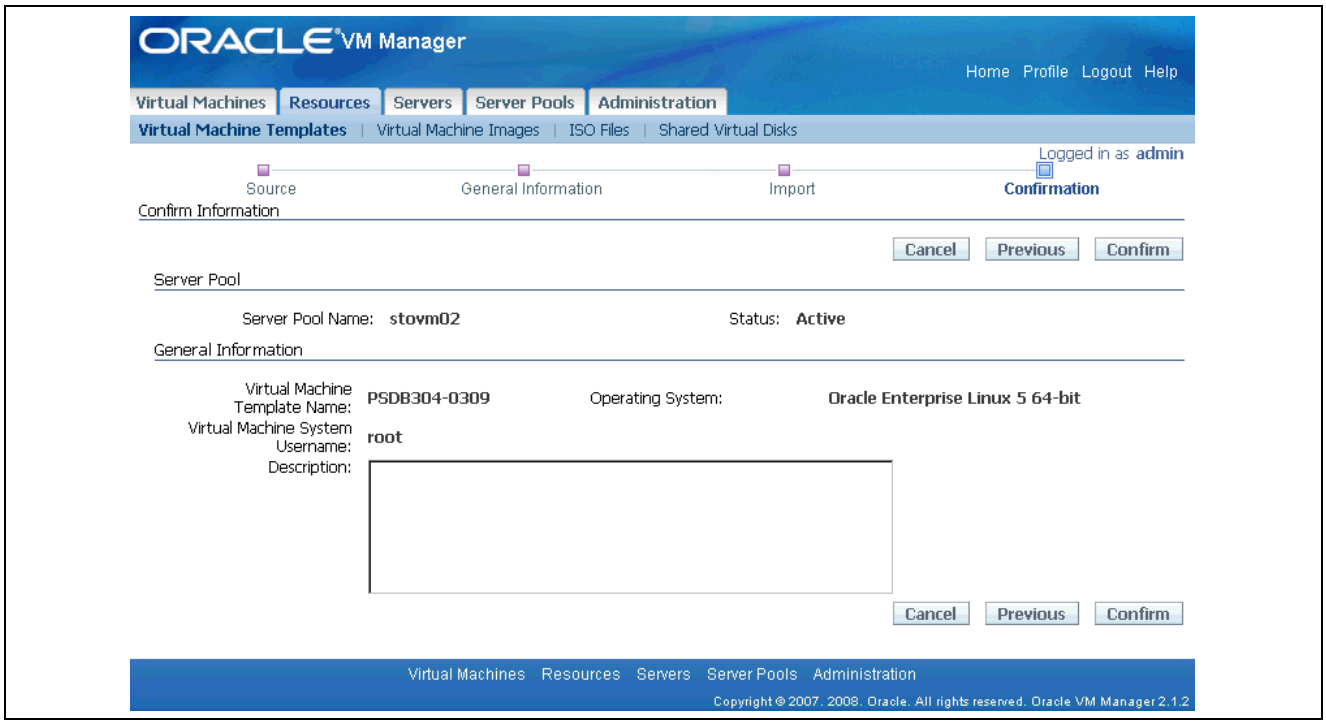
  Enter the user name used to log in to the virtual machine after it is booted. In the example shown *root* is supplied as the user name.

- Virtual Machine System Password

  Enter the Oracle VM template root account password, *ovsroot*.

Note. This is not the same as the console password that you choose in the next step to create the virtual machine. The Console Password is used to log in to the console using a VNC client while the password chosen here is used to log in to the system using SSH client sessions.

6. Click Next, and confirm that the information you entered, such as Server Pool Name, Virtual Template Name, Operating System, and so on, are correct.



Confirm Information page

7. Click Confirm.

   After importing, the status of the virtual machine template is Pending. You need to approve it to make it available for creating virtual machines.

8. Select the template you want to approve, and click Approve.

   A page appears with information about the template. Click Approve again. The status changes to Active.

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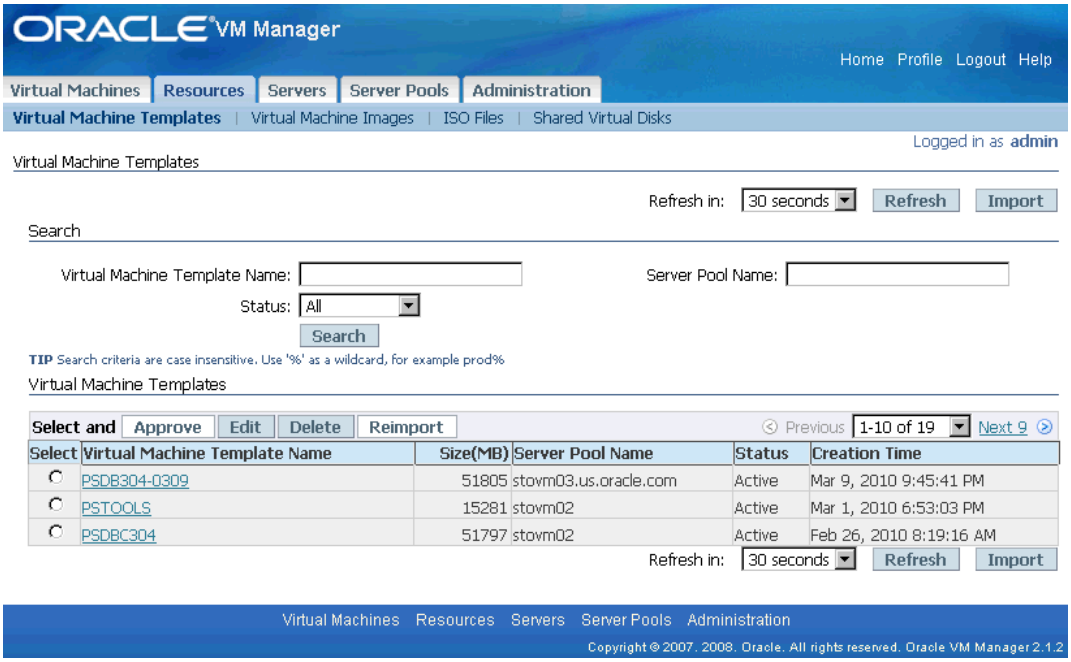

Virtual Machine Templates page

Task 2-2: Creating the Virtual Machines

This section assumes that you have imported the templates as described in the previous section, and are logged in to Oracle VM Manager. Carry out the procedure described here for each of the Oracle VM for PeopleSoft Enterprise templates.

To create a virtual machine based on an Oracle VM for FSCM template:

1. Select the Virtual Machines tab.

   The Virtual Machines page lists existing virtual machines.

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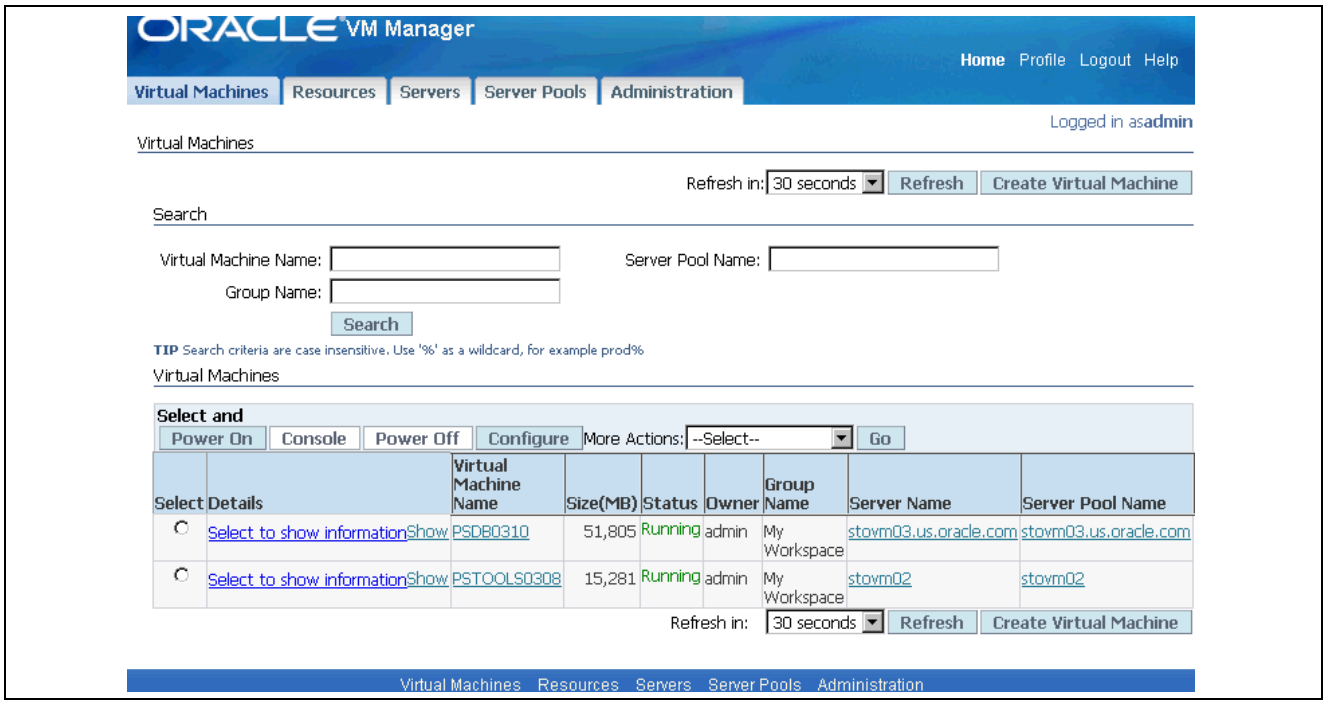
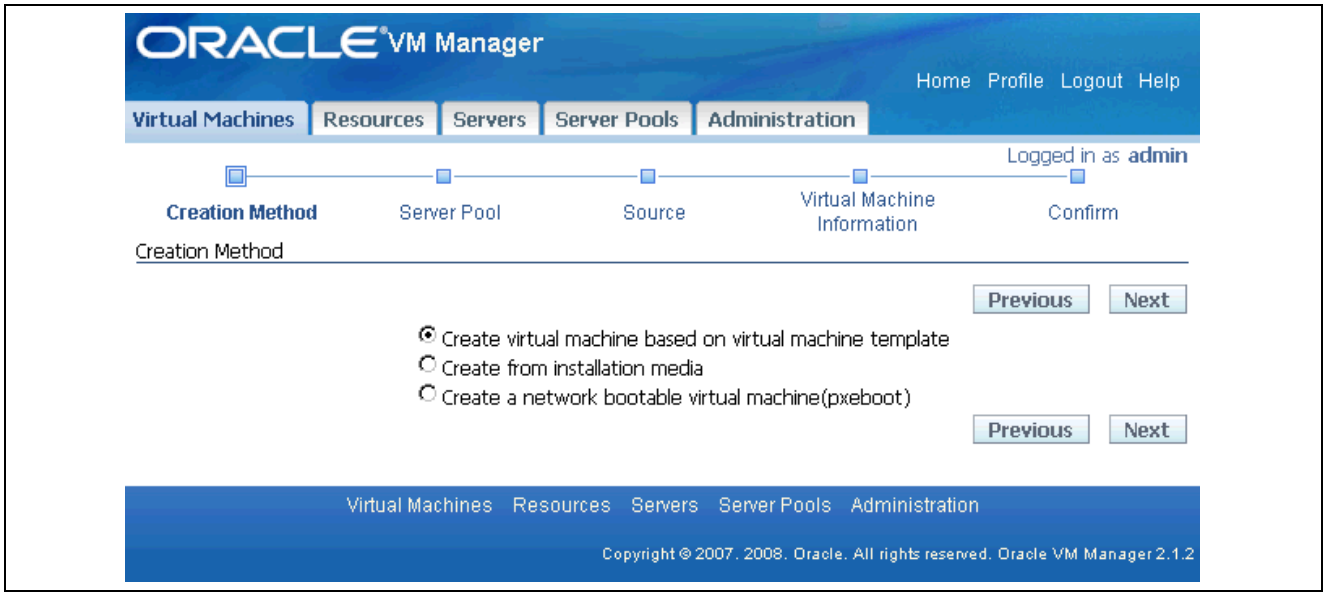


Oracle VM Manager Virtual Machines page

2. Click the Create Virtual Machine button.
3. Select the option Create virtual machine based on virtual machine template, and click Next.



Creation Method page

4. Select the server pool where the virtual machine is to be located.

   Accept the default Preferred Server option, Auto, and click Next.

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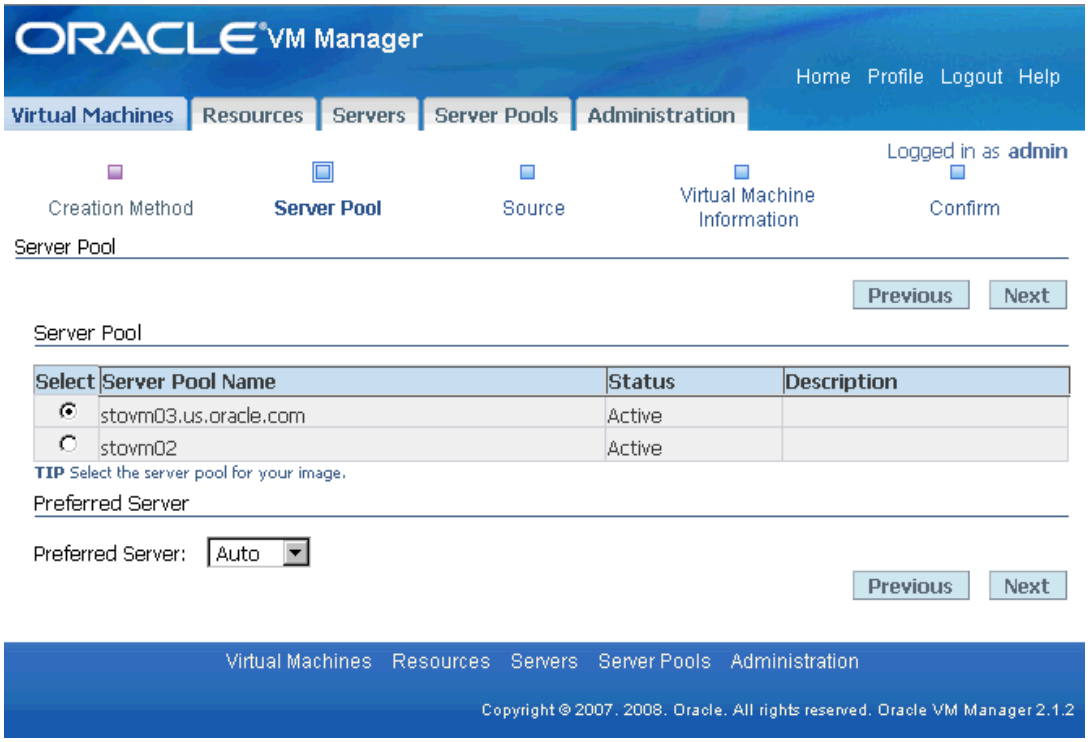

Server pool page with selected server pool

A preferred server is a Virtual Machine Server that provides resources such as memory, CPUs, virtual network interfaces (VIFs), and disk for the virtual machine. If you select only one Virtual Machine Server as the preferred server, the virtual machine then always starts from and runs on this server. If you select multiple preferred servers, each time the virtual machine starts, it will choose to run on the one with the maximum resources available (including memory and CPU).

When creating a virtual machine, there are two ways to select a Virtual Machine Server for the virtual machine:

- Auto: In the Auto mode, when the virtual machine starts, Oracle VM automatically assigns a Virtual Machine Server with the maximum resources available to run the virtual machine. The virtual machine then runs on this Virtual Machine Server temporarily, until it is shut down.
- Manual: In the Manual mode, you select one or more Virtual Machine Servers as the preferred servers. The virtual machine then starts from and runs on the preferred server with the maximum resources available.

Note. If none of the preferred servers can provide sufficient resources, the virtual machine may fail to start.

---

5. Select the template that you imported to use for this virtual machine, and then click Next.

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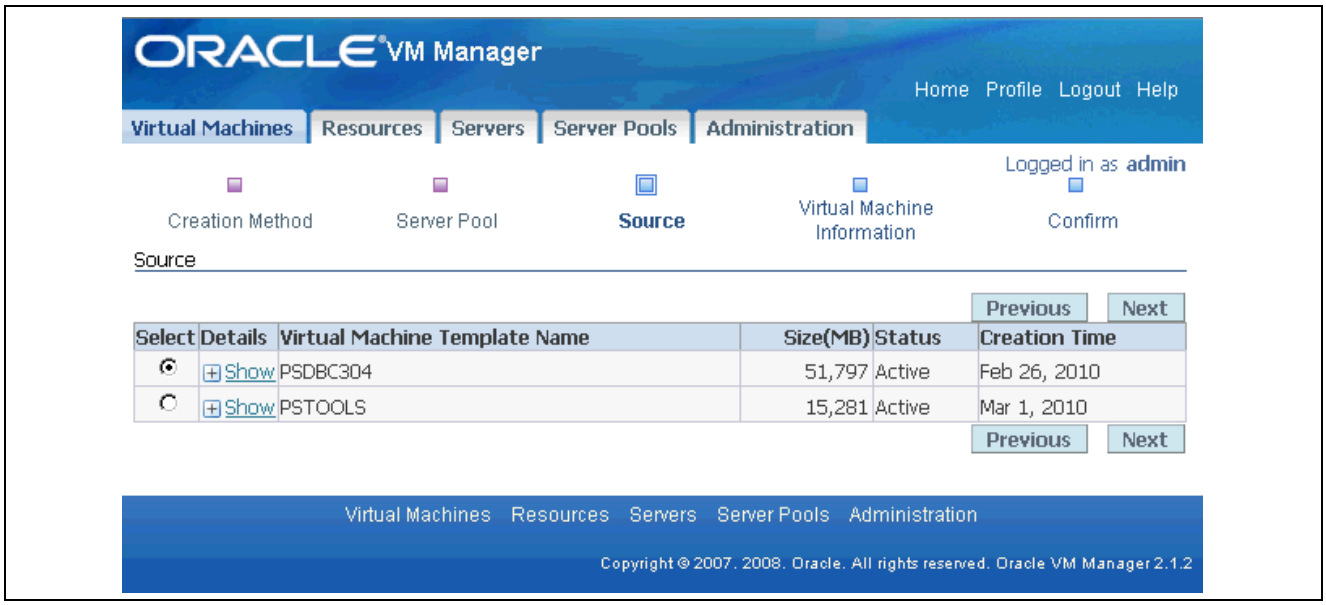
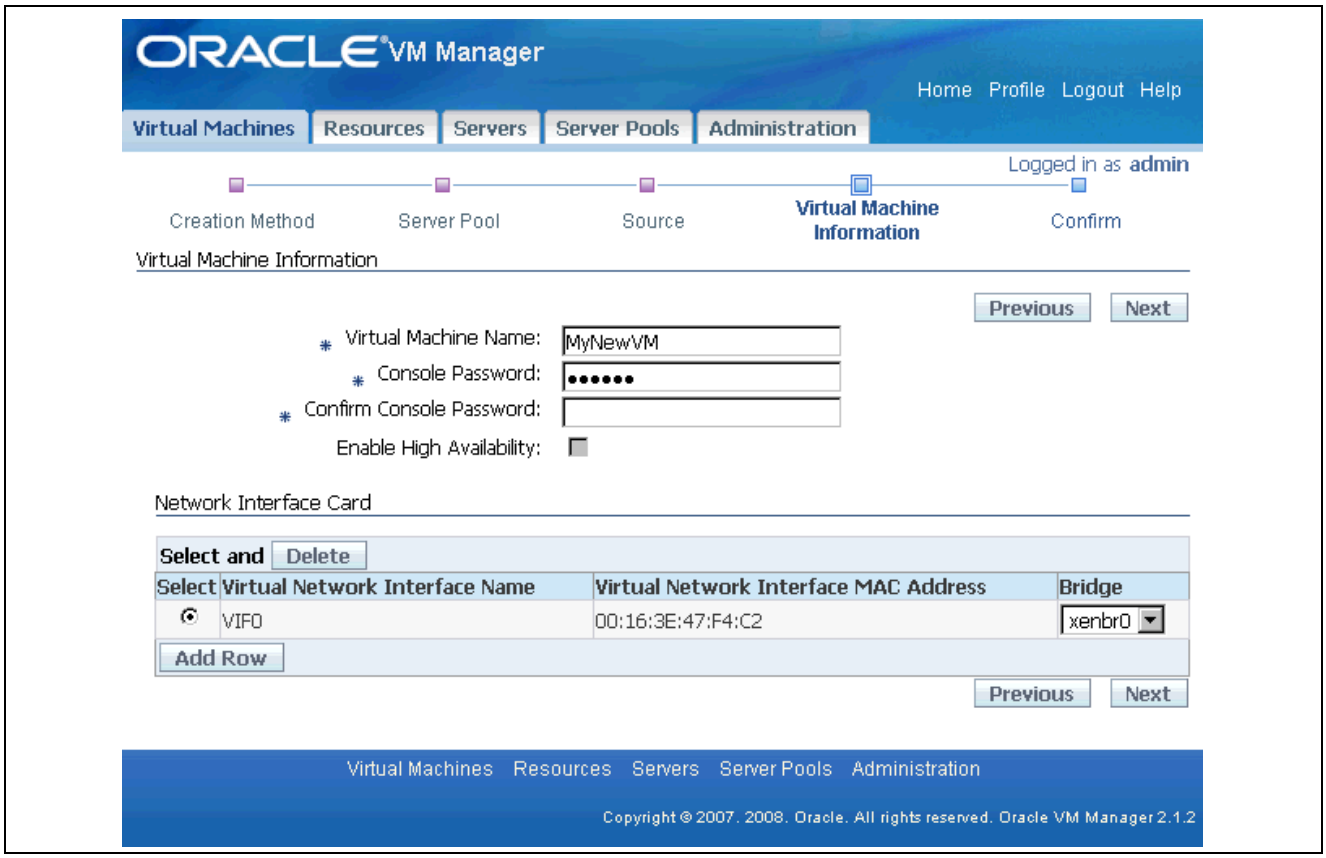


Source page with selected template

6. Enter the following information, and then click Next:



Virtual Machine Information page

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- Virtual Machine Name

  This name will be used as the name of the directory under /OVS/running_pool, where the files associated with this virtual machine are stored.

  Note. The virtual machine name does not have to be the same as the name of the virtual machine host.

- Console Password

  Enter the password to log in to the console, and enter it again to confirm the password. You use the connection through the console to access and start the virtual machine. This may be the console plug-in documented in the Oracle VM Manager User's guide, or another VNC client.

  See *Oracle VM Manager User's Guide* "Connecting to a Virtual Machine's Console."

- Enable High Availability

  This is optional. See the section on enabling high availability in the Oracle VM documentation.

  See *Oracle VM User's Guide,* "Managing Server Pools."

- Add Row

  This is optional. Select this option to add more virtual network interfaces. By default, virtual network interfaces are named VIF0, VIF1, VIF2, and so on. You can rename them after creating the virtual machine. See the information on changing virtual machine configuration in the Oracle VM documentation.

  See *Oracle VM Manager User's Guide,* "Managing Virtual Machines."

7. Confirm that the information for user, virtual machine, virtual machine template, and server pool are correct, and then click Confirm.

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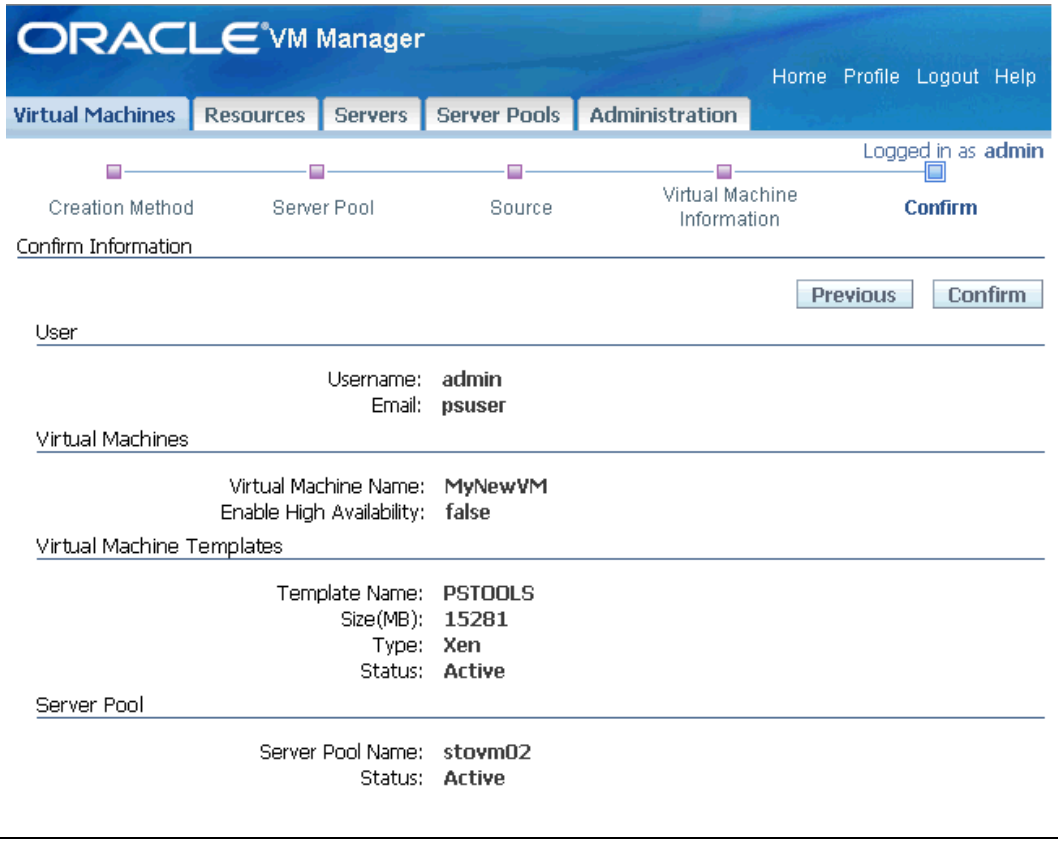

Confirm Information for the virtual machine

8. Click Refresh periodically until the status of the virtual machine changes from Creating, as shown in the first example, to Powered Off, as shown in the second example.

   The process of creating a virtual machine takes time. You can choose to refresh manually, or to refresh every 30 seconds.

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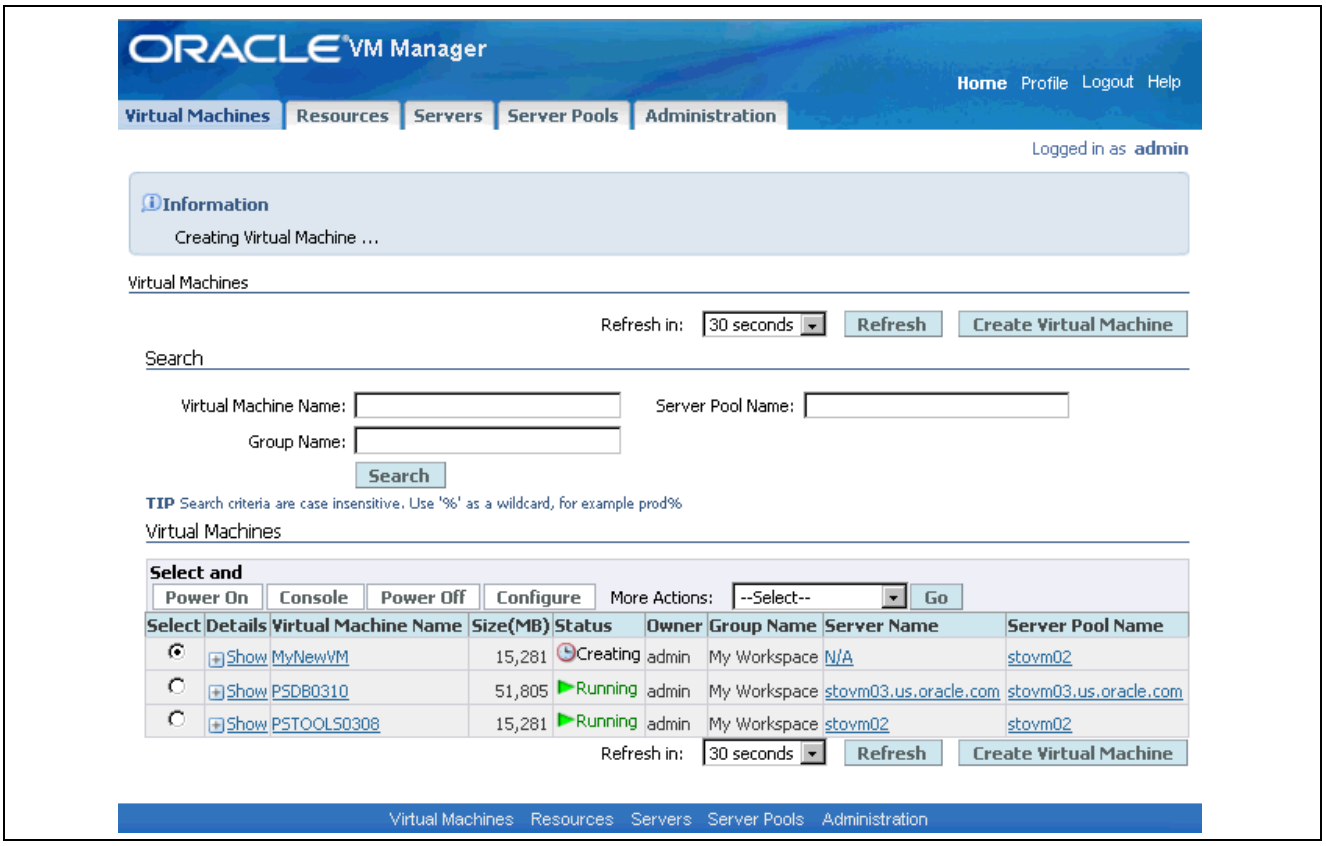
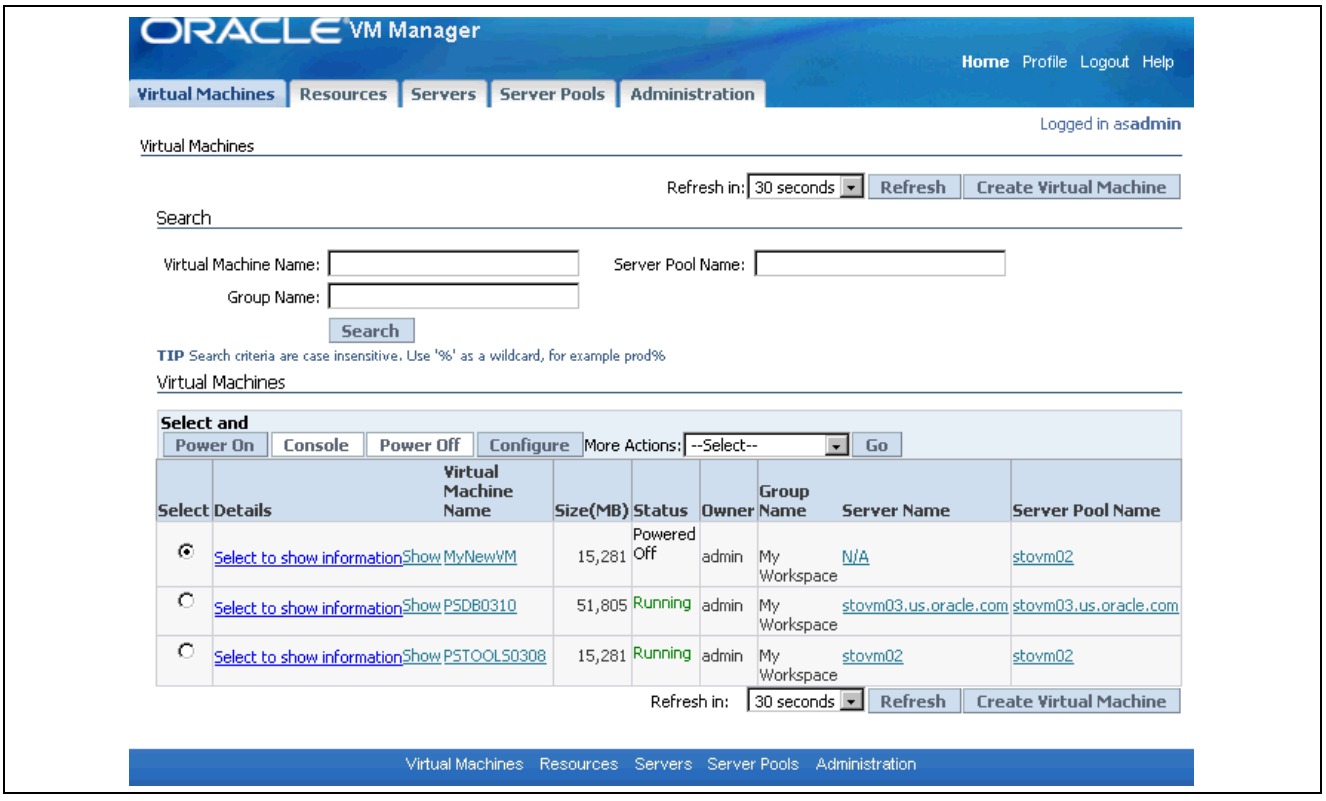


Creating Virtual Machine page with virtual machine in Creating status



Creating Virtual Machine page with virtual machine in Powered Off status

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9. If the status goes to Error, refer to the virtual machine error section in the Oracle VM Manager User's Guide.

   See *Oracle VM Manager User's Guide,* "Managing Virtual Machines"

Task 2-3: Starting the Oracle VM for PeopleSoft Enterprise Virtual Machines

This section discusses:

- Understanding the Virtual Machine Initialization
- Starting the Database Virtual Machine
- Starting the PIA-AppBatch Virtual Machine
- Installing Micro Focus Server Express 5.1 after Starting the Virtual Machines

Understanding the Virtual Machine Initialization

Start the virtual machines for each of the Oracle VM for FSCM templates. It is important that you start the virtual machines in the following order:

1. Database
2. PIA-AppBatch

After starting the virtual machines in Oracle VM Manager, log in to each virtual machine in a console to verify that the virtual machine creation was successful, and that it is accessible. You will be prompted with a few configuration questions for the PeopleSoft installation. You must supply both network information, such as IP addresses, and information specific to the PeopleSoft installation, such as the database SID.

Be aware that if you supply incorrect network information in response to these prompts (such as IP address, hostname, DNS server IP, gateway and so on) the new virtual machine will not function, and you should create a fresh virtual machine.

Task 2-3-1: Starting the Database Virtual Machine

Starting a virtual machine is analogous to starting a computer by pressing the Power On button. Ensure that the virtual machine is powered off before you start it.

To start and initialize the Database virtual machine:

1. Select the Virtual Machines tab.
2. On the Virtual Machines page, select the virtual machine that you created for the Database template.
3. Click the Power On button.
4. Periodically, click the Refresh button until the virtual machine status changes from Initializing to Running.

   You can choose to refresh manually, or to refresh every 30 seconds.
5. Open your console application (for example, VNC client) and log into the virtual machine.

   Log in using the console password you specified when importing the template.

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There are several prompts asking for network-related information. You see the same network-related prompts when starting each of the virtual machines. The text in bold font indicate places that require user input:

Important! Be sure to respond quickly to the prompt "Use DHCP". If you do not enter *n* within a few seconds, the system assumes a value of *y* and proceeds.

```
Configuring network.
Use DHCP? y/n [n] n
Static IP: 12.345.678.900
Netmask: 555.555.555.5
Default gateway IP: 12.345.678.9
DNS server IP: 123.45.678.90
Hostname: host_name
Stopping network...
Shutting down interface eth0:        [OK]
Shutting down loopback interface:    [OK]
Configuring static IP.
IP address: 12.345.678.900
Net mask: 555.555.555.5
Gate way: 12.345.678.9
Host name: host_name
Starting network...
Bringing up loopback interface:      [OK]
Bringing up interface eth0:          [OK]
```

6. Respond to the following prompts requesting database information.

   Enter values for your environment or accept the defaults.

Note. If necessary, check with your Oracle database administrator for information about these values.

Note. You may see error messages about the Oracle database after responding to this prompt. In addition, the last line that asks for the local bin directory may not appear. You can ignore the error messages, or the missing query, and continue.

```
Do you want to relink the binaries? (y/n) [n]
Specify the HTTP port that will be used for Oracle Application Express [8080]:

Specify a port that will be used for the database listener [1521]:

Specify a password to be used for database accounts.  Note that the same⇒
 password will be used for SYS, SYSTEM and ADMIN for APEX.  Oracle recommends⇒
 the use of different passwords for each database account.  This can be done⇒
 after initial configuration:
Confirm the password:

Do you want Oracle Database to be started on boot (y/n) [y]:

Enter the full pathname of the local bin directory: [/usr/local/bin]:
```

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7. Specify a database name at the following prompt, for example *FSCM91*:

```
Enter the name of the database SID [SID]: FSCM91
```

8. Log in to the virtual machine using Secure Shell (SSH), with root and ovsroot as the user and password:

```
Enterprise Linux Enterprise Linux Server release 5.2 (Carthage)
Xernel 2.6.18-92.0.0.0.1.e15xen on an x86_64
host_name login:
```

After you answer the configuration questions, the database server starts, and the demo database is available for the PIA-AppBatch server.

Task 2-3-2: Starting the PIA-AppBatch Virtual Machine

Ensure that the database server is running before beginning this procedure.

The PIA-AppBatch virtual machine is used to run PeopleSoft Pure Internet Architecture, the PeopleSoft Application Server, and the PeopleSoft Process Scheduler within the same virtual machine.

You can choose to run PeopleSoft Pure Internet Architecture on one virtual machine, and the PeopleSoft Application Server and Process Scheduler on a separate virtual machine by your response to the prompts in the following procedure.

Furthermore you can decide to deploy neither the PIA nor AppBatch on a virtual machine. In this case the virtual machine on which you deployed the database template would be analogous to a traditional system with PeopleSoft PeopleTools and PeopleSoft application files installed in *PS_HOME*, but with no Application Server domain, Process Scheduler domain, or PeopleSoft Pure Internet Architecture site set up.

The procedure to start the PIA-AppBatch virtual machine includes prompts for the Micro Focus Server Express COBOL compiler and license management facility (LMF). You can choose to install at this time or do it after you finish starting the virtual machines. If you answer yes to the prompts:

- Micro Focus Cobol Compiler and Runtime along with LMF are installed.
- A 30-day evaluation license is installed.

  For information on installing a full license, see the Enterprise PeopleTools 8.51 installation guide and the COBOL information on My Oracle Support.

  See *Enterprise PeopleTools 8.51 Installation for Oracle.*

  See "PeopleSoft Enterprise Frequently Asked Questions about PeopleSoft and the Micro Focus COBOL Compiler," My Oracle Support, (search for article name).
- FSCM COBOL sources are automatically compiled and linked.

To start and initialize the PIA-AppBatch virtual machine:

1. Select the Virtual Machines tab.
2. On the Virtual Machines page, select the virtual machine that you created for the PIA-AppBatch template.
3. Click the Power On button.
4. Periodically, click the Refresh button until the virtual machine status changes from Initializing to Running.

   You can choose to refresh manually, or to refresh every 30 seconds.
5. Open your console application and log into the virtual machine using the console password you specified when importing the template.

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The same network-related prompts appeared as in the previous section.

6. Respond *y* to this prompt if you want to set up the PeopleSoft Application Server and Process Scheduler:

```
Do you wish to setup PeopleSoft Application Server on this VM [y|n]:
```

7. Provide the name of the database and the host on which the database is running.

   The database host will be the virtual machine that you set up in the previous task. The default port is 1521. Enter *y* when you have finished.

```
Enter the name of the database [FSCM91]:
Enter the hostname for the database server [localhost]:
Enter the port number for the database host [1521]:
Are you happy with your answers [y|n] :
```

8. Enter *y* if you want to have the installer complete additional setup steps, as described in the prompt:

```
If this VM is connecting to a PeopleSoft database created from an Oracle VM
template some additional setup may be required.  We can automate these steps
for you.  If you are connecting to a Database that has been used before
you may wish to skip this step.
Do you want this additional setup to be performed? [y|n]:
```

   You see a progress indicator as the PeopleSoft Application Server and Process Scheduler domains are started.

Note. If you experience problems in starting the PeopleSoft Application Server and Process Scheduler domains, see "Resetting PeopleSoft Virtual Machines."

---

9. Read the information concerning the installation of Micro Focus Server Express 5.1 WP4 and license management facility (LMF):

```
Installing Micro Focus Server Express 5.1 WP4 and LMF ...
-------------------------------------------------------------------------------
Before installing and using this software product you must
agree to be bound by the terms and conditions of the end user
license agreement ("License Agreement") which accompanies this product.
Please take this time to read the License Agreement. If you are not in
agreement with the terms and conditions of the License Agreement, please
return the product to your Account Representative and your money will
be refunded.  If you require a replacement copy of the License
Agreement, please contact your Account Representative before proceeding
with the install process.
Do you agree to the terms of the License Agreement? (y/n):
```

10. If you want to accept the installation of Micro Focus Server Express with a 30-day license, enter *y*.

    You see the following message:

```
-------------------------------------------------------------------------------
This product is protected using the Micro Focus License Management
Facility (LMF).
Please refer to the Development System Licensing Guide for information relating
to the installation of the licensing system and licenses.
```

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```
Empty database created ok
LMF installation complete

------------------------------------------------------------------------------
Installation completed successfully.

The COBOL system is ready to use.

A 30 day evaluation license has been installed for the Micro Focus Server
Express 5.1 COBOL Compiler and Runtime. Please contact Micro Focus or
Oracle Sales for a full license if you intend to use this product beyond
the 30 day evaluation period.

MF-LMF: Thu Sep 2 13:59:50 2010: LMF Starting

Compiling & Linking COBOL sources ...
```

11. If you do not want to install Micro Focus Server Express at this time, enter *n*.

    Note. Follow the procedure in the task Installing Micro Focus Server Express 5.1 after Starting the Virtual Machines to install Cobol Compiler and Runtime after the PIA-AppBatch virtual machine is booted up completely.

12. After the PeopleSoft Application Server and Process Scheduler domain initialization has completed, respond *y* to the prompt to set up PeopleSoft Pure Internet Architecture:

    Note. If you wish to use a separate virtual machine for the PeopleSoft Pure Internet Architecture, answer *n* to this prompt.

    ```
    Do you wish to setup PeopleSoft Pure Internet Architecture on this VM [y|n]:
    ```

    The setup process will run for a few minutes.

13. At the prompt asking for the PeopleSoft Application Server host and Jolt port, accept the default or provide a DNS-recognized name or IP address for the host. The default port number is 8000.

    If you want to connect to an Application Server domain that was set up and is running independently of the current virtual machine, provide the appropriate information for that domain.

    ```
    Enter the connect string for the AppServer domain.  This is the host:port
    on which the Application Server domain will listen for incoming connections.
    You may provide failover and load balancing rules using the format described
    in the PeopleBooks.  Hit Enter to use the default [localhost:8000]:
    ```

14. Answer *y* to the following prompt if you want the installer to complete additional setup steps:

    ```
    You are running both AppBatch and PeopleSoft Internet Architecture in the
    same VM.  This means that some additional automated setup can be done.
    Report Nodes, integrations etc. can be created due to the presence of
    multiple tiers in the same host.
    Note:  you may not wish to do this if connecting to an existing database.
    This is a step typically taken in demo environment with a clean database.
    Do you wish for this additional setup to be performed [y|n]:
    ```

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15. Log in to the virtual machine using Secure Shell (SSH), with root and ovsroot as the user and password:

    Note. You can also log in to the console using one of the default accounts described in the task Using the PeopleSoft Installation.

```
Enterprise Linux Enterprise Linux Server release 5.2 (Carthage)
Xernel 2.6.18-92.0.0.0.1.e15xen on an x86_64
host_name login:
```

The Application Server and Process Scheduler domains will successfully start provided the database server is running. The Application Server domain is based on the small domain configuration. The PeopleSoft Pure Internet Architecture domain is configured to connect to the Application Server domain.

After a few minutes, you can log in to the PeopleSoft application in a browser using the following URL, with PS/PS as the user name and password:

```
http://MACHINE_NAME:8000/ps/signon.html
```

Task 2-3-3: Installing Micro Focus Server Express 5.1 after Starting the Virtual Machines

If you chose not to install the Micro Focus COBOL compiler during the procedure to start the virtual machines, use these instructions to install the compiler. After you start the PIA-AppBatch virtual machine, you can find the installation binaries for Micro Focus Server Express 5.1 on the virtual machine.

1. On the PIA-AppBatch virtual machine, go to the directory /opt/oracle/psft/pt/cobol/svrexp-51_wp4-64bit.

```
cd /opt/oracle/psft/pt/cobol/svrexp-51_wp4-64bit
```

2. Run the install script to install Micro Focus Compiler and License Management Facility (LMF).

   For example:

```
sh install
```

   The welcome prompt appears:

```
This script will install Micro Focus Server Express 5.1 on this computer.

The readme.txt file included in this delivery contains details of
new features, enhancements and any restrictions of which you should
be aware. This file is located in :

/opt/oracle/psft/pt/cobol/svrexp-51_wp4-64bit/docs

We strongly recommend you read this file once the installation is complete.

Do you wish to continue (y/n):
```

3. Type *y* to continue after the welcome prompt.
4. Read and type *y* to accept the license agreement:

```
Before installing and using this software product you must agree to be
bound by the terms and conditions of the end user license agreement
("License Agreement") which accompanies this product.
```

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```
Please take this time to read the License Agreement. If you are not
in agreement with the terms and conditions of the License Agreement,
please return the product to your Account Representative and your
money will be refunded. If you require a replacement copy of the
License Agreement, please contact your Account Representative before
proceeding with the install process.
Do you agree to the terms of the License Agreement? (y/n): y
```

5. After reading the information below type *y* to continue:

Note. Only a portion of the prompt is given here.

```
This product is certified on the following reference environment
....
....
Please confirm that you want to continue
with this installation (y/n): y
```

6. After reading the information below press RETURN to continue:

```
When you press return you will be shown details of the reference
environment (and any compatibility environments).

Please press return when you are ready:
```

7. After reading the information below type *y* to continue:

Note. Only a portion of the prompt is given here.

```
This product is certified on the following reference environment:
The command(s) used to gather the information is given following each entry.

...
...
...
Please confirm your understanding of the above reference environment
details (y/n): y
```

8. Answer *n* to the following prompt:

Note. PeopleSoft COBOL implementations do not require COBOL and Java to work together.

```
Do you want to make use of COBOL and Java working together? (y/n): n
Skipping Java setup
Should you want to use Java with COBOL later on as super user, run the command
/opt/oracle/psft/pt/cobol//svrexp-51_wp4-64bit/bin/java_setup
to select the version of Java you want to use.
```

9. Answer *y* to the following prompt concerning the License Management Facility:

```
This product is protected using the Micro Focus License Management
```

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```
Facility (LMF). Please refer to the Development System Licensing Guide
for information relating to the installation of the licensing system
and licenses.
If you do not have LMF installed or want to upgrade to the latest version,
we recommend that you install it now.
Would you like to install LMF now? (y/n): y
```

10. Enter /opt/oracle/psft/pt/cobol/microfocus as the directory to install the LMF:

```
Enter the directory name where you wish to install License Manager.
(Press Enter for default directory /opt/microfocus/mflmf)
/opt/oracle/psft/pt/cobol/microfocus
/opt/oracle/psft/pt/cobol/microfocus does not exist
do you wish to create it ? (y/n) y
```

11. Enter *y* to restrict access to the License Admin System to the superuser account:

```
Empty database created ok. Do you want only superuser to be able to access the
License Admin System? (y/n) y
```

12. Enter *y* to start license manager automatically at boot time:

```
It is recommended that you let license manager autostart at boot time.
Do you want license manager to be automatically started at boot time? (y/n) y
LMF installation complete.
```

13. If you want to consult the documentation on how to install licenses, follow the instructions in this prompt:

```
Please consult the Development Licensing Guide for detailed information
on how to install licenses.
This may be done by running the mflicense tool. License tool can be run
by changing directory to where the LMF was installed
(/opt/oracle/psft/pt/cobol/microfocus) and typing ./mflmcmd

--------------------------------------------------------------------------------
To run your applications you need a deployment license installed using Apptrack.
See your Deployment Licensing Guide for details.
Installing Apptrack...

Access permissions on directory /var/mfaslmf have changed on this release
Write access permission has been removed except for superuser use
Apptrack installation complete
```

14. Enter *64* for the system default mode:

```
This product can be used in either 32-bit or 64-bit modes.
Please enter either 32 or 64 to set the system default mode: 64
System default COBMODE has been set to 64.
```

15. Enter *n* at the following prompt:

```
Installing documentation. Please wait...
Enterprise Server provides a scalable, managed, and high-performance
transactional environment for the deployment of COBOL applications and
services, COBOL/J2EE applications and direct COBOL Web Services.
```

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```
Your Enterprise Server requires configuration. You can either do it
now or later. To do it now, you need to know the alphanumeric user ID of the
Enterprise Server System Administrator.
To do it later, enter the following commands whilst logged in as root:
/opt/oracle/psft/pt/cobol/microfocus/svrexp-51_wp4-64bit/bin/eslminstall
/opt/oracle/psft/pt/cobol/microfocus/svrexp-51_wp4-64bit/bin/casperm
Do you wish to configure Enterprise Server now? (y/n): n
```

16. Enter *n* at the following prompt:

```
XDB is a fully-functional ANSI-compliant relational database management system,
providing support for SQL data access for development purposes.
Do you want to install XDB? (y/n): n
Skipping XDB install. Should you want to install XDB later on,
run the following command as the root user:
sh /opt/oracle/psft/pt/cobol/microfocus/svrexp-51_wp4-64bit/xdb/xdb_install
```

17. Review the information concerning setting the COBDIR, LD_LIBRARY_PATH, and PATH environment variables in the concluding prompt:

```
(Remember to set COBDIR to /opt/oracle/psft/pt/cobol/svrexp-51_wp4-64bit,
include /opt/oracle/psft/pt/cobol/svrexp-51_wp4-64bit/lib in LD_LIBRARY_PATH
and include /opt/oracle/psft/pt/cobol/svrexp-51_wp4-64bit/bin on your PATH)

WARNING: Any executables (whether a Run-Time System or an application)
must be relinked using this new release. Otherwise, the results
of running the older executables with this new release are undefined.
Installation completed successfully.
The COBOL system is ready to use.
```

18. Use the instructions in step 13 to install the Micro Focus license and start the LMF:

```
cd /opt/oracle/psft/pt/cobol/microfocus
./mflmman
```

Note. You can find the 30-day evaluation license in the license.txt file in the directory /opt/oracle/psft/pt/cobol/svrexp-51_wp4-64bit

---

19. Log in to the PIA-AppBatch virtual machine using the user ID psadm1.

    See Using the PeopleSoft Installation.

20. Compile and link the COBOL sources.

    For example, use these commands:

```
cd $PS_HOME/setup
./pscbl.mak
./psrun.mak
```

    See *Enterprise PeopleTools 8.51 Installation for Oracle,* "Compiling COBOL on UNIX."

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Task 2-4: Using the PeopleSoft Installation

This section discusses:

- Reviewing the File System
- Using Application Designer

Task 2-4-1: Reviewing the File System

The PeopleSoft installation deployed by the Oracle VM for FSCM templates sets up an environment comprised of the following directories on the PIA-AppBatch virtual machine:

- PS_HOME

  The binary installation files are placed into a secure PS_HOME directory at /opt/oracle/psft/pt/tools. This directory can only be written to by the PeopleSoft administrator, psadm1.

- PS_CFG_HOME

  The application server and Process Scheduler server configuration files are placed into PS_CFG_HOME. This directory is owned by psadm2. The PS_CFG_HOME path is /home/psadm2/psft/pt/<*peopletools_version*>.

- Other directories

  The rest of the environment, outside PS_HOME and PS_CFG_HOME, is owned by root. The file system ownership and permissions are similar to typical OEL installations.

Note. The psadm1 and psadm2 users with the passwords below, are also available for the PIA-AppBatch virtual machine.

The deployed configuration includes two default users:

- The PeopleSoft installation administrator who owns PS_HOME is psadm1. The password for this user is 0radmin (the first character is the number zero). This user cannot write into PS_CFG_HOME.
- The domain user who creates and configures the application server domain, Process Scheduler (batch server) domain, and the PIA, is psadm2. The password for this user is 0radmin (the first character is the number zero). This user cannot write to PS_HOME, but has read-execute access.
- The users psadm1 and psadm2 can only access the PIA-AppBatch virtual machine.

The deployed configuration on the Database virtual machine includes the ORACLE_HOME directory, /uo1/app/oracle/product/11.1.0/db_1. You can find the sqlplus utility in the ORACLE_HOME/bin directory.

See Also

"About this Documentation," Related Information.

Enterprise PeopleTools 8.51 PeopleBook: System and Server Administration, "Securing PS_HOME and PS_CFG_HOME"

Enterprise PeopleTools 8.51 PeopleBook: System and Server Administration, "Working with Server Domain Configurations"

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Task 2-4-2: Using Application Designer

The Microsoft Windows-based program Application Designer is an important tool that is used to perform a variety of administrative tasks in a PeopleSoft environment.

The PeopleSoft installation deployed by the Oracle VM for HCM templates includes the binaries required to run Application Designer. The binaries are provided as a zip archive on the PIA-AppBatch virtual machine in the following directory:

/opt/oracle/psft/pt/tools/toolsclient.zip

Application Designer runs only on Microsoft Windows and therefore cannot be run in the OVMs that are provided with this distribution.

In order to work with the Application Designer client it is necessary to enable the Workstation Listener (WSL) process in the Application Server domain. The WSL process listens by default on port 7000 for incoming connections from Application Designer.

Enable the WSL process by reconfiguring the AppServer domain through PSADMIN and turning on the WSL option in the domain configuration dialog. Once domain reconfiguration is completed and the domain is restarted, you can use the following procedure to run and sign in on Application Designer.

See *PeopleTools 8.51 PeopleBook: System and Server Administration* for information on using PSADMIN and WSL.

See *Enterprise PeopleTools 8.51 Installation for Oracle*, "Configuring the Application Server on UNIX," Creating, Configuring, and Starting an Initial Application Server Domain.

To run Application Designer:

1. Copy the Application Designer zip archive from /opt/oracle/psft/pt/tools/toolsclient.zip on the PIA-AppBatch instance to a convenient directory, referred to here as *INSTALL_DIR*, on a Microsoft Windows machine, and extract.
2. Run *INSTALL_DIR*\bin\client\winx86\pside.exe to start Application Designer.

   The PeopleSoft Signon dialog box opens.

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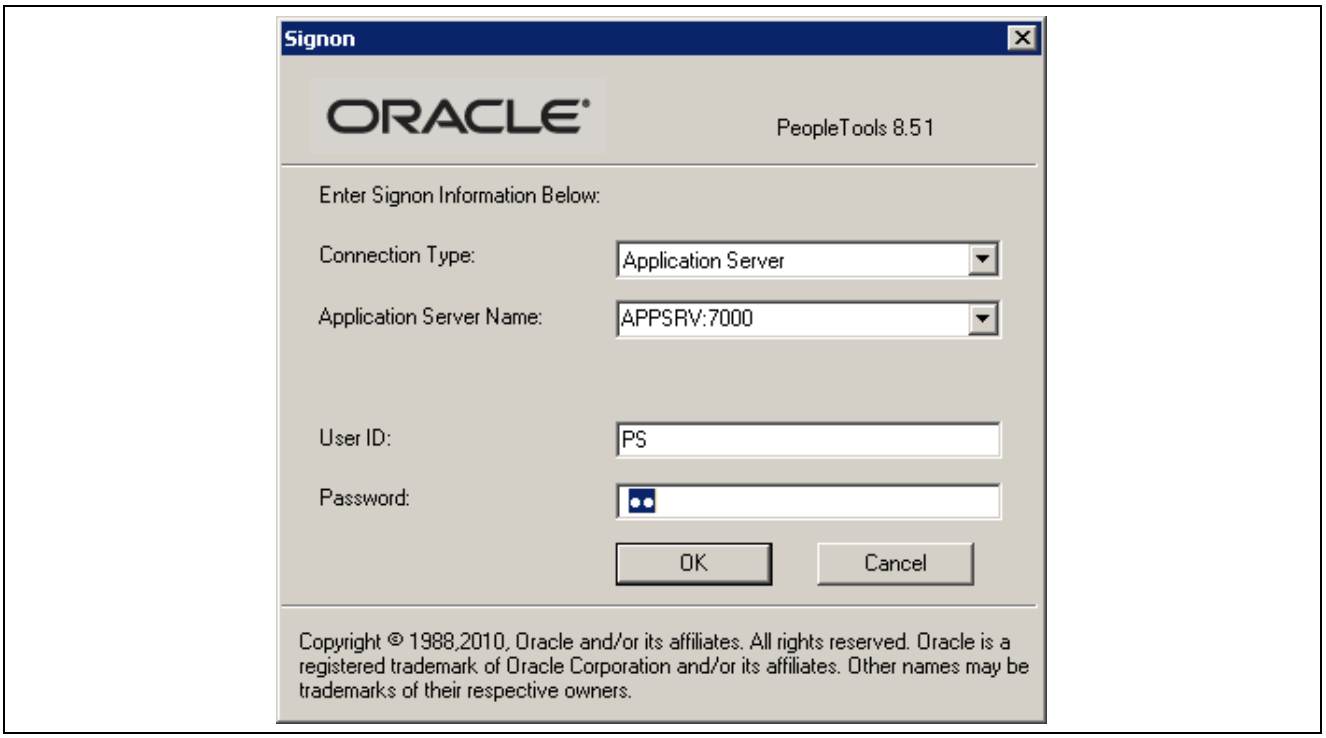

PeopleSoft Signon dialog box with Application Server connection type

3. Select Application Server from the Connection Type drop-down list as shown above.
4. For Application Server Name, enter the hostname and WSL port for the PeopleSoft Application Server that you want to connect to.

   The example shows the default WSL port 7000.
5. Enter PS/PS for User ID and Password.

Task 2-5: Configuring FSCM

This section discusses:

- Reviewing FSCM Products
- Reviewing FSCM Demo Data
- Adding User Profiles for eProcurement

Task 2-5-1: Reviewing FSCM Products

The products included in the OVM Templates for FSCM include the following, in alphabetical order:

- Asset Lifecycle Management (ALM) Asset Management
- ALM IT Asset Management
- ALM Maintenance Management
- ALM Real Estate

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- Catalog Management for Financials, ESA and SCM
- Enterprise Service Automation (ESA) Contracts
- ESA Contracts for Government Contracting
- ESA Grants
- ESA Program Management
- ESA Project Costing
- ESA Proposal Management
- ESA Resource Management
- Financials, ESA, ALM, and SCM Portal Packs
- Financial Management Solution (FMS) Banks
- FMS Cash Management
- FMS Commitment Control
- FMS Deal Management
- FMS eSettlements
- FMS Expenses
- FMS Financial Gateway
- FMS Global Options and Reports
- FMS Payables
- FMS Receivables
- FMS Risk Management
- Supply Chain Management (SCM) Billing
- SCM Cost Management
- SCM eBill Payment
- SCM Engineering
- SCM Flow Production
- SCM Inventory
- SCM Inventory Policy Planning
- SCM Managing Items
- SCM Manufacturing
- SCM Order Management
- SCM Pricer
- SCM Product Configurator
- SCM Promotions Management
- SCM Quality
- SCM Supply Planning
- Supplier Relationship Management (SRM) eProcurement

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- SRM eSupplier Connection
- SRM Purchasing
- SRM Service Procurement
- SRM Strategic Sourcing

Note. A few of the products that are available with a traditional FSCM installation are not included with the OVM Templates for FSCM.

The following exceptions apply to the OVM Templates for FSCM:

- Pay/Bill Management

  Pay/Bill Management is not supported due to a limitation with integration setups.

- SRM Supplier Contract Management

  Certain parts of Supplier Contract Management will not work, as they rely on third-party software. This includes:

  - Digital Signature
  - Compare functionality
  - Convert to .pdf and .doc functionality

- SRM Service Procurement

  Certain parts of Service Procurement will not work, as they rely on third-party software. This includes:

  - Ineligible Service Providers—Service Procurement uses Verity to search for potential matches to Ineligible Service Providers on Bids and Work Orders, therefore it will not be possible to perform this validation in the OVM environment.
  - Invoice Print—Service Procurement uses SAP BusinessObjects Crystal Reports for printed invoices, therefore it will not be possible to print invoices in the OVM environment.

Task 2-5-2: Reviewing FSCM Demo Data

The deployment of the PeopleSoft templates provides a PeopleSoft Enterprise FSCM demo database. For additional information on post-installation steps, see the PeopleSoft PeopleTools and PeopleSoft Enterprise FSCM documentation referenced in the preface.

See "About this Documentation," Related Information.

As with any installation, it is a good idea to verify that the installation completed successfully, using your normal testing procedure. For information on installation verification, contact Oracle Global Customer Support.

Task 2-5-3: Adding User Profiles for eProcurement

In order to sign into the FSCM demo database to create requisitions, use the impeprousers.dms script to import the eProcurement demo user profiles. Download the zip file eProUsers.zip, containing the script and the EPROUSERS.DAT file, from the same My Oracle Support page where you obtained this installation guide.

To install the scripts:

1. Download and extract (unzip) the files.
2. Save the extracted EPROUSER.DAT file in the import directory for Data Mover.

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Save the impeprousers.dms script in *PS_HOME*/scripts.

3. Launch PeopleSoft Data Mover and sign into the downloaded OVM database.
4. Run the impeprousers.dms script against the downloaded OVM database.
5. Sign into the FSCM application as an administrator and set the passwords for the following users:
   - Kelly Jones
   - Chris Baker
   - Wendy Cho
   - Patrick Sanchez

See Also

PeopleSoft Enterprise eProcurement 9.1 PeopleBook

PeopleSoft PeopleTools 8.51 PeopleBook: Security Administration

Task 2-6: Troubleshooting

Here are some resources to use if you encounter a problem during the deployment of the Oracle VM for FSCM templates:

- For problems with Oracle VM Manager and Oracle VM Server, read the troubleshooting sections in the user's guides.

  See *Oracle VM Manager User's Guide.*

  See *Oracle VM Server User's Guide.*

- For logging information, read the /var/log/oraclevm-template.log file.

  The oraclevm-template.log is a centralized log file that includes information about the Oracle VM initialization and the PeopleSoft deployment.

- See the PeopleSoft PeopleTools installation guide and PeopleBooks for information on the application server, Process Scheduler, and PeopleSoft Pure Internet Architecture.

Here are a few suggestions for typical troubleshooting avenues:

- Verify that you have enough resources—disc space, memory—on the machine that is running the Oracle VM Server.
- If an error status was reported in Oracle VM Manager immediately after starting the virtual machine this may be due to insufficient resources on the host computer.

  You can verify this by consulting the log file linked from the Virtual Machine tab in Oracle VM Manager. This error is commonly reported as "not enough space under /OVS" with a report of how much disk space is required and how much is available.

- If you deployed the templates using more than one computer, make sure the network communication between the computers is functioning.
- Use the Oracle VM Manager for information on template status, as shown previously.

  See Importing Oracle VM for PeopleSoft Enterprise Templates.

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- If you are sure the templates are up and running, but the PeopleSoft log in window does not appear, try the same steps that you use for traditional PeopleSoft installations, such as rebooting the application server and restarting PeopleSoft Pure Internet Architecture.

  To access the PeopleSoft PeopleTools utilities such as psadmin, go to /opt/oracle/psft/pt/tools.

  See *Enterprise PeopleTools 8.51 Installation for Oracle.*

Task 2-7: Managing the Virtual Environment Lifecycle

This section discusses:

- Understanding Virtual Machine Management
- Saving Virtual Machines as Templates
- Using the PeopleSoft Configuration Script
- Resetting PeopleSoft Virtual Machines

Understanding Virtual Machine Management

After you create and initialize your PeopleSoft virtual machine environment, you may want to customize it and save the customized environment as a template to share within your company. In general, the steps to follow in creating a template from a customized environment are:

1. Set up the virtual machines using the original templates.
2. Customize the environment.

   See Saving Virtual Machines as Templates.
3. Edit the configuration plug-in script.

   See Using the PeopleSoft Configuration Script.
4. Issue commands to clean up and restart the virtual machines using the modified configuration script.

   See Resetting PeopleSoft Virtual Machines.
5. Save the virtual machine as a new template.

See Also

"Oracle Virtualization," Oracle Technology Network web site, http://www.oracle.com/us/technologies/virtualization/index.html

Task 2-7-1: Saving Virtual Machines as Templates

The virtual machines that you create from the PeopleSoft templates can actually be saved as customized templates. For example, you may create a virtual machine from the PeopleSoft PIA-AppBatch template, change some of the domain configuration settings, and then save the virtual machine as a new template. This new template can then be replicated throughout the organization. This means that you don't need to repeat the same customization steps each time you create a virtual machine. Instead it is possible to install software into a virtual machine or add specific configuration preferences and then save the virtual machine as a new template. This new template can be used to create any number of virtual machines.

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There are a few things to keep in mind when saving a virtual machine as a template. When saving a virtual machine as a template you may want to install software into the virtual machine from which you will create the template. If you do so, you must make sure that the software that you have installed is virtualization safe. This means that the installation is not bound to the IP address or hostname through any configuration files, database entries, and so on. When you save a virtual machine as a template the installed components must be host neutral, so that they will be able to run without any problems in new virtual machines that have different hostnames or IP addresses.

If the software that you have installed requires licensing on a per host or per processor basis, you should ensure that you have the adequate number of licenses for your site. The terms surrounding licensing will vary from application to application.

When saving a PeopleSoft virtual machine as a template you may wish to add customized first boot configuration steps. This means that you should edit the first boot configuration script, as described in the following section.

See Using the PeopleSoft Configuration Script.

Task 2-7-2: Using the PeopleSoft Configuration Script

To add configuration steps to the PeopleSoft templates, use the delivered configuration script, `/opt/oracle/psft/vm/oraclevm-template-ext.sh`. You can find this script in any PeopleSoft template. If you wish to extend the template, you can overwrite or add to this script.

The `oraclevm-template-ext.sh` script includes the four functions described in this table:

Function Name	Description
ovm_configure_pre	This function is run before the PeopleSoft PeopleTools configuration scripts. This function can perform any custom setup steps prior to the running of the PeopleSoft PeopleTools setup.
ovm_configure_post	This function is run after the PeopleSoft PeopleTools configuration scripts. This function can perform any custom steps required after the PeopleSoft PeopleTools setup has completed.
ovm_cleanup_pre	This function is run when a virtual machine is being cleaned up. This function is called before the PeopleSoft PeopleTools cleanup.
ovm_cleanup_post	This function is run when a virtual machine is being cleaned up. This function is called after the PeopleSoft PeopleTools cleanup.

When the template is being initialized, the first boot configuration calls the four functions in the order presented in the table. The first boot configuration calls the function ovm_configure_pre() before any of the PeopleSoft PeopleTools setup functions begin, and ovm_configure_post() after the PeopleSoft PeopleTools setup functions have completed.

This script does not just play a role when initializing. When the virtual machine is being cleaned, the PeopleSoft PeopleTools cleanup script calls the ovm_cleanup_pre() function before any of the PeopleSoft PeopleTools setup functions begin, and ovm_cleanup_post() function after the PeopleSoft PeopleTools setup functions have completed. As described in the above table these functions are located in `/opt/oracle/psft/vm/oraclevm-template-ext.sh`.

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Any of these functions may be empty. These functions may call any of the functions in the PeopleSoft PeopleTools scripts. This allows them to manipulate and override the functions delivered in the PeopleSoft PeopleTools scripts.

After you have modified the `/opt/oracle/psft/vm/oraclevm-template-ext.sh` configuration script to include your preferred code, it is necessary to reset the template to get it ready to be saved, as described in the following section.

See Resetting PeopleSoft Virtual Machines

For more detailed information about the functions discussed in this section, review the README file included in the /opt/oracle/psft/vm directory.

Task 2-7-3: Resetting PeopleSoft Virtual Machines

It is possible to reset your virtual machine such that the next time it is started it will appear as a clean, newly started template. This is achieved by using the following commands, in the order given:

```
/usr/sbin/oraclevm-template --cleanup
/usr/sbin/oraclevm-template --enable
```

Use these commands when you have customized a virtual machine and want to save it as a template. Once you have decided that you want to save a particular virtual machine as a template, connect to the virtual machine using the VNC client, issue the two commands above, shut it down using Oracle VM Manager, and then finish by saving it as a template.

Note. Because the `/usr/sbin/oraclevm-template --cleanup` option resets the network stack on the virtual machine it may appear to hang. If this happens, exit your login session and reconnect to the virtual machine, using the VNC client to invoke the `/usr/sbin/oraclevm-template --enable` option.

See Also

Oracle VM Manager User's Guide, "Managing Virtual Machines"

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