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PeopleSoft Enterprise Performance Management 9.1 Revision 2 Installation Guide

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PeopleSoft Enterprise Performance Management 9.1 Revision 2
Installation Guide
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Contents

Chapter 2
Installing and Configuring IBM InfoSphere DataStage..47

Chapter 3
Deploying Oracle Fusion Campus Solutions Intelligence for PeopleSoft 129

Contents

About This Documentation

This preface discusses:

• Understanding This Documentation

• Audience

• Typographical Conventions

• Products

• Related Information

• Comments and Suggestions

Understanding This Documentation

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

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

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

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

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

Audience

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

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

• SQL and SQL command syntax.

• PeopleSoft system navigation.

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

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

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

Typographical Conventions

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

Convention	Description
`Monospace`	Indicates a PeopleCode program or other code, such as scripts that you run during the install. Monospace is also used for messages that you may receive during the install process.
Italics	Indicates field values, emphasis, and book-length publication titles. Italics is also used to refer to words as words or letters as letters, as in the following example: Enter the letter *O*.
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or page.
lower case	File or directory names are represented in lower case, unless they appear otherwise on the interface.
Menu, Page	A comma (,) between menu and page references indicates that the page exists on the menu. For example, "Select Use, Process Definitions" indicates that you can select the Process Definitions page from the Use menu.
Cross-references	Cross-references that begin with *See* refer you to additional documentation that helps you implement the task at hand. Oracle highly recommends 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.

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

Products

This documentation may refer to these products and product families:

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

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

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

Related Information

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

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

- Product documentation for PeopleSoft Application Fundamentals for your PeopleSoft application and release. This documentation provides essential information about the setup, design, and implementation of your PeopleSoft application.

To access PeopleSoft Online Help (PeopleBooks), go to My Oracle Support and search for the PeopleSoft Online Help (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 Online Help (PeopleBooks), and other Oracle reference and training materials. Please send your suggestions to:

PSOFT-Infodev_US@oracle.com

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

CHAPTER 1

Installing and Configuring PeopleSoft Enterprise Performance Management Components

This chapter discusses:

• Using the Oracle Software Delivery Cloud to Obtain Installation Files

• Installing PeopleSoft PeopleTools and Creating the PeopleSoft EPM 9.1 Revision 2 Database

• Disabling Applets on the Installation Table

• Running Required Scripts for PeopleSoft Workforce Analytics Applications

• Loading PeopleSoft Workforce Scorecard Sample Data (Demo Database)

• Loading PeopleSoft Customer Scorecard Sample Data (Demo Database)

• Loading PeopleSoft Project Portfolio Management Sample Data (Demo Database)

• Loading PeopleSoft Supplier Rating Sample Data (Demo Database)

• Loading PeopleSoft CFO Portal Solution KPI Sample Data (Demo Database)

• Loading PeopleSoft Healthcare Scorecard Sample Data (Demo Database)

• Loading PeopleSoft Manufacturing Scorecard Sample Data (Demo Database)

• Installing the PeopleSoft EPM Charting Tool (AVS) and ABM Applets

• Installing and Configuring PeopleSoft Planning and Budgeting

• Installing the PeopleSoft Planning and Budgeting Spreadsheet Add-In Program

This chapter discusses how to install various components required for running Oracle's PeopleSoft Enterprise Performance Management 9.1 Revision 2 applications.

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

Before beginning the installation, you must obtain the PeopleSoft Enterprise Performance Management 9.1 Revision 2 (EPM 9.1 Revision 2) installation software by downloading the necessary zip files from the Oracle Software Delivery Cloud portal (formerly Oracle E-Delivery). Use the documentation available on the Oracle Software Delivery Cloud to ensure that you obtain all of the zip files that your environment requires.

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

Task 1-2: Installing PeopleSoft PeopleTools and Creating the PeopleSoft EPM 9.1 Revision 2 Database

This section discusses:

• Reviewing PeopleSoft EPM 9.1 Revision 2 Demo Database Sizing by Platform

• Installing Application Files to the Custom PS_APP_HOME Location

• Accessing Instructions for Multi-Language Customers

• Installing Multilingual File References and Maintenance Log Data

Reviewing PeopleSoft EPM 9.1 Revision 2 Demo Database Sizing by Platform

PeopleSoft Enterprise Performance Management 9.1 Revision 2 (EPM 9.1 Revision 2) requires the installation of PeopleSoft PeopleTools 8.53 with minimum patch 02 or higher.

The following table lists the approximate PeopleSoft EPM 9.1 Revision 2 Demo database size for each platform.

Platform	Database Type	Demo Database Size (approximate)
Oracle	ANSI	16 GB
	Unicode	16 GB
DB2/UNIX	ANSI	29 GB
	Unicode	22 GB
DB2/zOS	ANSI	15.6 GB
	Unicode	18.3 GB
Microsoft SQL Server	ANSI	4.6 GB
	Unicode	6.6 GB

See PeopleTools: Installation, for your current release of PeopleTools.

See PeopleTools: System and Server Administration, for your current release of PeopleTools.

Note. *For DB2 only:* Ensure that the *db parameter logfilsiz* is set to 20000 (instead of 12000), before you start the Database Creation Wizard (DCW) or begin creating the database manually.

The following two files under PS_HOME\scripts or PS_APP_HOME\scripts need to be edited:

createdb-95.sql for ANSI db type

createdbu.sql for Unicode db type

Note. *For Oracle 11GR2 only:* Ensure that the parameter *_complex_view_merging=FALSE* is appended to *init.ora*, before you start the Database Creation Wizard (DCW). Otherwise, the two views INCDATRDY_VW and CG_MKTDATDN_VW will fail.

Note. If you optionally ordered the CDs/DVDs to install PeopleSoft EPM 9.1 Revision 2, rather than electronically downloading from the Oracle Software Delivery Cloud portal, be aware that installing PeopleSoft EPM 9.1 Revision 2 on UNIX requires the installation of CD1 only. You are prompted to install CD2 only when installing on Microsoft Windows.

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

Beginning with PeopleSoft PeopleTools 8.53, you can elect to install your PeopleSoft application files into a custom location that is identified by the PS_APP_HOME environment variable.

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

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

See Oracle's PeopleSoft PeopleTools 8.53 Release Notes

See PeopleTools Installation, for your database platform and for your current release of PeopleTools.

See PeopleTools: System and Server Administration, for your current release of PeopleTools.

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

Task 1-2-2: Accessing Instructions for Multi-Language Customers

Additional multi-language installation instructions are available. You must load several .dat files (and the corresponding .dms scripts) after you load the equivalent English files. The .dat files are as follows:

- hc910imp_*xxx*.dms \ .dat
- mfg910imp_*xxx*.dms \ .dat
- ppm910imp_*xxx*.dms \ .dat
- scc910imp_*xxx*.dms \ .dat
- scf910imp_*xxx*.dms \ .dat
- sci910imp_*xxx*.dms \ .dat
- scw910imp_*xxx*.dms \ .dat
- srm910imp_*xxx*.dms \ .dat

Where *xxx* denotes the language code.

The available languages are:

- CFR—Canadian French

- DUT—Dutch
- ESP—Spanish
- FRA—French
- GER—German
- ITA—Italian
- JPN—Japanese
- POR—Portuguese
- ZHS—Simplified Chinese

Task 1-2-3: Installing Multilingual File References and Maintenance Log Data

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

Note. These steps should be run only if you have installed the multilingual media pack.

To import multilingual data:

1. Sign on with PeopleSoft Data Mover to the EPM 9.1 application database.

2. Open the PeopleSoft Data Mover script:

   <PS_APP_HOME>\scripts\multilingual_data_i.dms

3. Run this script against the EPM 9.1 application database.

4. Close PeopleSoft Data Mover.

Task 1-3: Disabling Applets on the Installation Table

Unless you plan to use the applets in conjunction with the PeopleSoft Scorecard and Activity-Based Management (ABM) applications, you should verify that the Applets check box is clear (disabled) on the installation table.

To verify that the Applets check box is disabled:

1. Select EPM Foundation, EPM Setup, Installation Analysis & Options, Installation Options, and then select the Web Services tab.

2. Verify that the Applets check box is clear (not selected).

   If selected, clear the Applets check box and then save your changes.

3. Log out of PeopleSoft Pure Internet Architecture, and then log in again to make the changes take effect.

Task 1-4: Running Required Scripts for PeopleSoft Workforce Analytics Applications

If you are installing any PeopleSoft Workforce Analytics applications (PeopleSoft Workforce Rewards, PeopleSoft Workforce Planning, or PeopleSoft Workforce Scorecard), you must run the following PeopleSoft Data Mover script to create and populate the compensation code tree:

    DWA88001.dms

To create and populate the compensation code tree:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VP1* .

2. Run the following PeopleSoft Data Mover script:

    DWA88001.DMS

Note. In a decoupled environment, this script is located in the *PS_APP_HOME*\scripts directory on the file server.

If you do not have a decoupled environment, this script is located in the *PS_HOME*\scripts directory on the file server.

The script loads the sample data that is located in the DWA88001.dat file.

Task 1-5: Loading PeopleSoft Workforce Scorecard Sample Data (Demo Database)

If you are installing PeopleSoft Workforce Scorecard, run the following PeopleSoft Data Mover script against the PeopleSoft EPM 9.1 Revision 2 demo database, to use the PeopleSoft Workforce Scorecard in a demo environment. This installs the delivered key performance indicators (KPIs), strategy components, and so on, and updates the final tables. This allows you to view the PeopleSoft Workforce Scorecard using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database and then export the data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata and so on) in a production environment, you must also ensure that the setID, scenario, and model are appropriate for use with your production data.

To load the PeopleSoft Workforce Scorecard sample data:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VP1* .

2. Run the following PeopleSoft Data Mover script:

    SCW910IMP.dms

Note. In a decoupled environment, this script is located in the *PS_APP_HOME*\scripts directory on the file server.

If you do not have a decoupled environment, this script is located in the *PS_HOME*\scripts directory on the file server.

This script loads the sample data that is located in the SCW910IMP.dat file.

Note. If you have licensed languages other than English, you must also run SCW910IMP_*xxx*.dms, where *xxx* denotes the language code.

Task 1-6: Loading PeopleSoft Customer Scorecard Sample Data (Demo Database)

If you are installing PeopleSoft Customer Scorecard, run the following PeopleSoft Data Mover script against the PeopleSoft EPM 9.1 Revision 2 demo database to use the PeopleSoft Customer Scorecard in a demo environment. This installs the included KPIs, strategy components, and so on, and updates the final tables to allow you to view the PeopleSoft Customer Scorecard using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database and export that data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database, and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata, and so on) in a production environment, you must ensure that the setID, scenario, and model are appropriate for use with your production data.

To load the PeopleSoft Customer Scorecard sample data:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VP1* .

2. Run the following PeopleSoft Data Mover script:

```
SCC910IMP.dms
```

Note. In a decoupled environment, this script is located in the *PS_APP_HOME*\scripts directory on the file server.

If you do not have a decoupled environment, this script is located in the *PS_HOME*\scripts directory on the file server.

This script loads the sample data that is located in the SCC910IMP.dat file.

Note. If you have licensed languages other than English, you must also run SCC910IMP_*xxx*.dms, where *xxx* denotes the language code.

Task 1-7: Loading PeopleSoft Project Portfolio Management Sample Data (Demo Database)

If you are installing PeopleSoft Project Portfolio Management, run the following PeopleSoft Data Mover script against the PeopleSoft EPM 9.1 Revision 2 demo database to use the PeopleSoft Project Portfolio Management KPIs in a demo environment. This installs the included KPIs, strategy components, and so on, and updates the final tables to allow you to view the PeopleSoft Project Portfolio Management KPIs using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database and then export that data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database, and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata, and so on) in a production environment, you must ensure that the setID, scenario, and model are appropriate for use with your production data.

To load the PeopleSoft Project Portfolio Management sample data:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VP1* .

2. Run the following PeopleSoft Data Mover script:

    ```
    PPM910IMP.dms
    ```

    Note. In a decoupled environment, this script is located in the *PS_APP_HOME*\scripts directory on the file server.

    If you do not have a decoupled environment, this script is located in the *PS_HOME*\scripts directory on the file server.

    This script loads the sample data that is located in the PPM910IMP.dat file.

    Note. If you have licensed languages other than English, you must also run PPM910IMP_*xxx*.dms, where *xxx* denotes the language code.

Task 1-8: Loading PeopleSoft Supplier Rating Sample Data (Demo Database)

If you are installing the PeopleSoft Supplier Rating System, run the following PeopleSoft Data Mover script against the PeopleSoft EPM 9.1 Revision 2 demo database to use the PeopleSoft Supplier Rating System KPIs in a demo environment. This installs the included KPIs, strategy components, and so on, and updates the final tables to allow you to view the PeopleSoft Supplier Rating System KPIs using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database and then export that data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database, and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata, and so on) in a production environment, you must ensure that the setID, scenario, and model are appropriate for use with your production data.

To load the PeopleSoft Supplier Rating System sample data:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VP1* .

2. Run the following PeopleSoft Data Mover script:

    ```
    SRM910IMP.dms
    ```

    Note. In a decoupled environment, this script is located in the *PS_APP_HOME*\scripts directory on the file server.

    If you do not have a decoupled environment, this script is located in the *PS_HOME*\scripts directory on the file server.

    This script loads the sample data that is located in the SRM910IMP.dat file.

    Note. If you have licensed languages other than English, you must also run SRM910IMP_*xxx*.dms, where *xxx* denotes the language code.

Task 1-9: Loading PeopleSoft CFO Portal Solution KPI Sample Data (Demo Database)

If you are installing PeopleSoft CFO Portal Solution, run the following PeopleSoft Data Mover script against the PeopleSoft EPM 9.1 Revision 2 demo database to use PeopleSoft CFO Portal Solution KPIs in a demo environment. This installs the included KPIs, strategy components, and so on, and updates the final tables. this allows you to view the PeopleSoft CFO Portal KPIs using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database, and then export that data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database, and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata, and so on) in a production environment, you must ensure that the setID, scenario, and model are appropriate for use with your production data.

Note. Complete this task only if you have licensed the PeopleSoft CFO Portal Solution. The PeopleSoft CFO Portal KPIs are delivered as part of the PeopleSoft EPM Portal Pack.

To load the PeopleSoft CFO Portal Solution KPIs:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VP1* .

2. Run the following PeopleSoft Data Mover script:

    ```
    SCF910IMP.dms
    ```

    Note. In a decoupled environment, this script is located in the *PS_APP_HOME*\scripts directory on the file server.

    If you do not have a decoupled environment, this script is located in the *PS_HOME*\scripts directory on the file server.

    This script loads the sample data that is located in the SCF910IMP.dat file.

    Note. If you have licensed languages other than English, you must also run SCF910IMP_*xxx*.dms, where *xxx* denotes the language code.

Task 1-10: Loading PeopleSoft Healthcare Scorecard Sample Data (Demo Database)

If you are installing PeopleSoft Healthcare Scorecard, run the following PeopleSoft Data Mover script against the PeopleSoft EPM 9.1 Revision 2 demo database to use PeopleSoft Healthcare Scorecard KPIs in a demo environment. This installs the included KPIs, strategy components, and so on, and updates the final tables. This allows you to view the PeopleSoft Healthcare Scorecard KPIs using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database, and then export that data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database, and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata, and so on) in a production environment, you must ensure that the setID, scenario, and model are appropriate for use with your production data.

To load the PeopleSoft Healthcare Scorecard sample data:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VP1* .

2. Run the following PeopleSoft Data Mover script:

   ```
   HC910IMP.dms
   ```

   Note. In a decoupled environment, this script is located in the *PS_APP_HOME*\scripts directory on the file server.

   If you do not have a decoupled environment, this script is located in the *PS_HOME*\scripts directory on the file server.

   This script loads the sample data that is located in the HC910IMP.dat file.

   Note. If you have licensed languages other than English, you must also run HC910IMP_*xxx*.dms, where *xxx* denotes the language code.

Task 1-11: Loading PeopleSoft Manufacturing Scorecard Sample Data (Demo Database)

If you are installing PeopleSoft Manufacturing Scorecard, run the following PeopleSoft Data Mover script against the PeopleSoft EPM 9.1 Revision 2 demo database to use the PeopleSoft Manufacturing Scorecard KPIs in a demo environment. This installs the included KPIs, strategy components, and so on, and updates the final tables. This allows you to view the PeopleSoft Manufacturing Scorecard KPIs using the sample data without the need to run any processes. After you become familiar with the included KPIs and other data, you can modify the data in the demo database, and then export that data to the system database as the starting point for your live data. Alternatively, you can run the PeopleSoft Data Mover script on your production database, and then make your modifications there. However, before you attempt to use the delivered scorecard objects and associated metadata (KPIs, calculation rules, KPI objects, data elements, metadata, and so on) in a production environment, you must ensure that the setID, scenario, and model are appropriate for use with your production data.

To load the PeopleSoft Manufacturing Scorecard sample data:

1. Start PeopleSoft Data Mover, logging on with a delivered user ID and password, such as *VP1* .

2. Run the following PeopleSoft Data Mover script:

```
MFG910IMP.dms
```

Note. In a decoupled environment, this script is located in the *PS_APP_HOME*\scripts directory on the file server.

If you do not have a decoupled environment, this script is located in the *PS_HOME*\scripts directory on the file server.

This script loads the sample data that is located in the MFG910IMP.dat file.

Note. If you have licensed languages other than English, you must also run MFG910IMP_*xxx*.dms, where *xxx* denotes the language code.

Task 1-12: Installing the PeopleSoft EPM Charting Tool (AVS) and ABM Applets

This section discusses:

• Prerequisites

• Installing in a Decoupled Environment

• Installing for an Oracle WebLogic Server

• Installing for an IBM WebSphere Server

• Configuring PeopleSoft Applications to Enable Charting

AVS is an additional component charting tool that is provided with PeopleSoft EPM. This charting tool installs on the web server to deliver charts over the Internet. The ABM Applets install on the web server to deliver PeopleSoft ABM Model Analyzer and PeopleSoft ABM Real Time over the Internet. This task describes the steps necessary to install AVS/ABM Applets on an Oracle WebLogic server, or an IBM WebSphere server using a Microsoft Windows/NT or UNIX platform. PeopleSoft Scorecard uses AVS to generate charts. PeopleSoft ABM Real Time and PeopleSoft ABM Model Analyzer use Java applets. Install AVS and PeopleSoft ABM Applets if you licensed any of the applications in the following list:

• PeopleSoft Activity-Based Management (ABM)

• PeopleSoft Scorecard

Note. These instructions are specific to the previously stated PeopleSoft EPM applications and should not be confused with the PeopleSoft PeopleTools charting capabilities that you can use with other applications.

Prerequisites

This installation must take place after completing your installation and set up of the following:

• PeopleSoft PeopleTools 8.53.02 or higher.

See PeopleTools 8.53 Installation guide for your database platform.

• PeopleSoft Enterprise Performance Management 9.1 Revision 2.

• PeopleSoft Pure Internet Architecture.

See PeopleTools 8.53 Installation documentation for your database platform: Installing PeopleSoft Pure Internet Architecture.

- For Microsoft Windows, the system extracts the following .jar files to <PS_HOME>\class:

com.peoplesoft.epm.ab.jar

com.peoplesoft.epm.bl.jar

com.peoplesoft.epm.pf.jar

Note. In a decoupled environment, this file is located in <PS_APP_HOME>\class.

If you do not have a decoupled environment, this file is located in <PS_HOME>\class.

In a decoupled environment, the PeopleTools and EPM applications are installed to different home directories. See the task titled "Installing Application Files to the Custom PS_APP_HOME Location," discussed earlier in this installation guide.

- For UNIX, the system extracts the following .jar files to <PS_HOME>/classes:

com.peoplesoft.epm.ab.jar

com.peoplesoft.epm.bl.jar

com.peoplesoft.epm.pf.jar

Note. In a decoupled environment, this file is located in <PS_APP_HOME>/appserv/classes.

If you do not have a decoupled environment, this file is located in <PS_HOME>/classes.

Task 1-12-1: Installing in a Decoupled Environment

Copying the EAR Files

If you have a decoupled environment where PeopleTools and EPM applications are installed to separate home directories, you need to copy the four ear files from <PS_APP_HOME>\setup\PsMpPIAInstall\archives to <PS_HOME>\setup\PsMpPIAInstall\archives.

This step is only required if you have a decoupled environment.

These are the four EAR files that you need to move:

epm_ab_wl.ear

epm_ab_ws.ear

epm_pf_wl.ear

epm_pf_ws.ear

Copying the JAR Files

If you have a decoupled environment where PeopleTools and EPM applications are installed to separate home directories, you need to copy the three jar files from <PS_APP_HOME>\class to <PS_HOME>\class.

This step is only required if you have a decoupled environment.

These are the three JAR files that you need to move:

com.peoplesoft.epm.ab.jar

com.peoplesoft.epm.bl.jar

com.peoplesoft.epm.pf.jar

Task 1-12-2: Installing for an Oracle WebLogic Server

To install the charting tool and Java applets for an Oracle WebLogic Server:

Note. These instructions use *PS_HOME* for Microsoft Windows and UNIX platforms, to refer to the location to which PeopleSoft PeopleTools is installed on your machine. For example, C:\PT8.53. Substitute your actual PeopleSoft PeopleTools path for *PS_HOME* for Microsoft Windows and UNIX platforms.

---

1. Launch the PeopleSoft Internet Architecture Install/Configure utility by launching setup.bat or setup.jar.

    For Microsoft Windows, the set up file is located at: *<PS_HOME>*\setup\PsMpPIAInstall\

    For UNIX, the set up file is located at: *<PS_HOME>*/setup/PsMpPIAInstall/.

    The Welcome to the InstallAnywhere Wizard for PeopleSoft Internet Architecture page appears, displaying the PeopleSoft PeopleTools version, as shown in the following example:
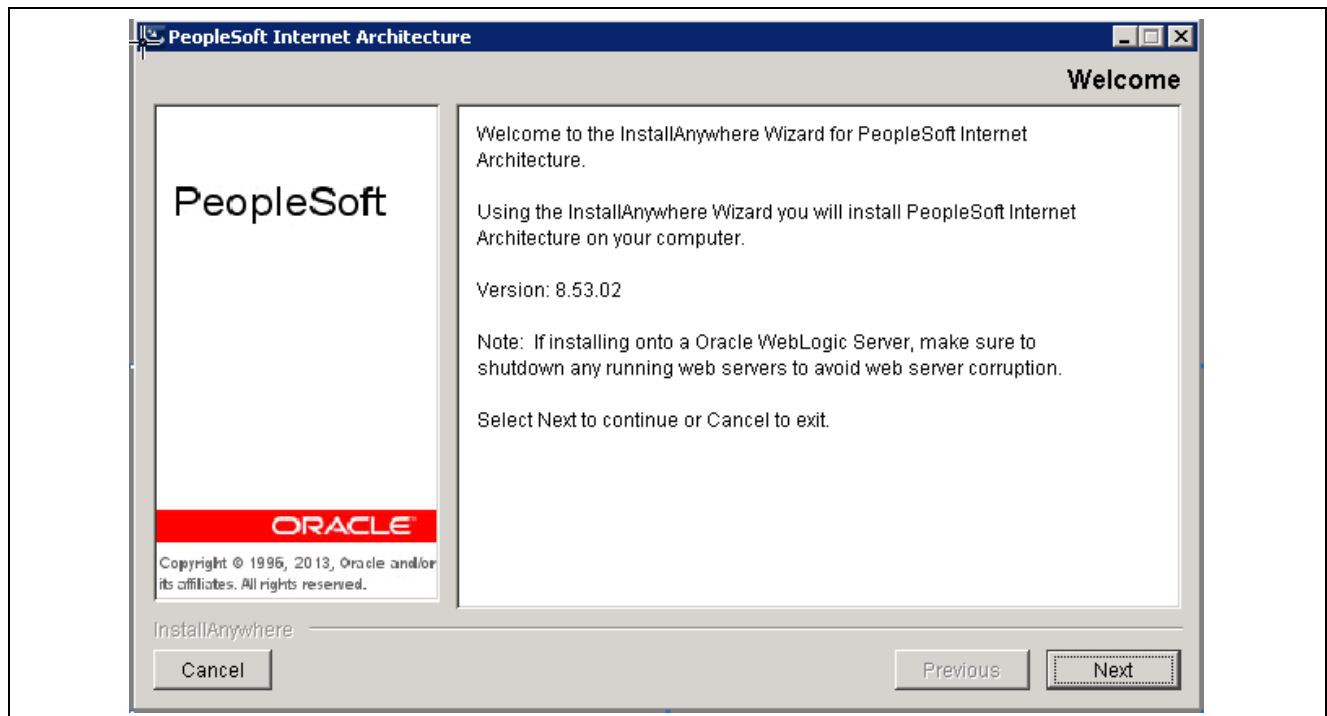
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Welcome page

    Click Next. The page with the option to *choose the directory to deploy PeopleSoft Pure Internet Architecture* appears.
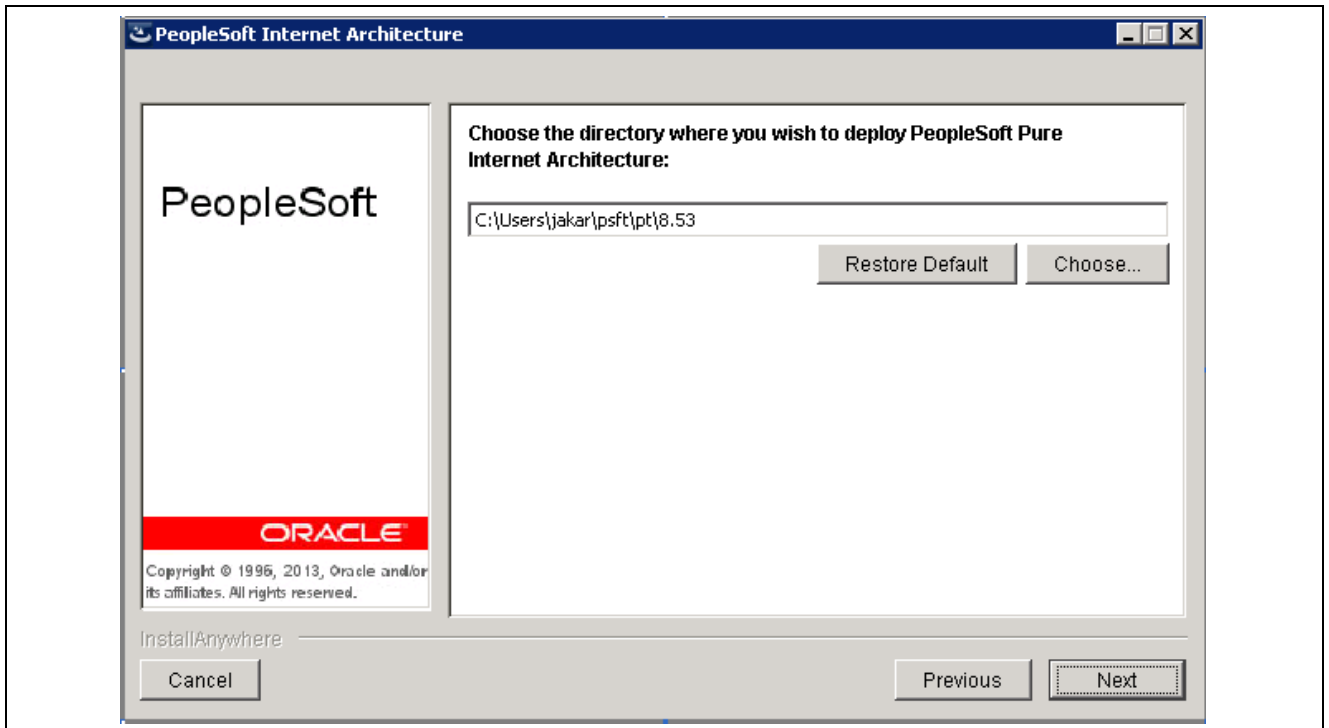
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Choose directory to deploy PeopleSoft Pure Internet Architecture

2.   Enter the directory where you originally deployed PeopleSoft Pure Internet Architecture (note that you are deploying application extensions in this task).

3.   Click Next until the page with the option to *Choose the installation type* appears, as shown in the following example:

InstallAnywhere Wizard for PeopleSoft Internet Architecture - Choose the installation type options page

4.   Select the Oracle WebLogic Server option.

5. Click Next.

6. Select the web server directory for installation, as shown in the following example:
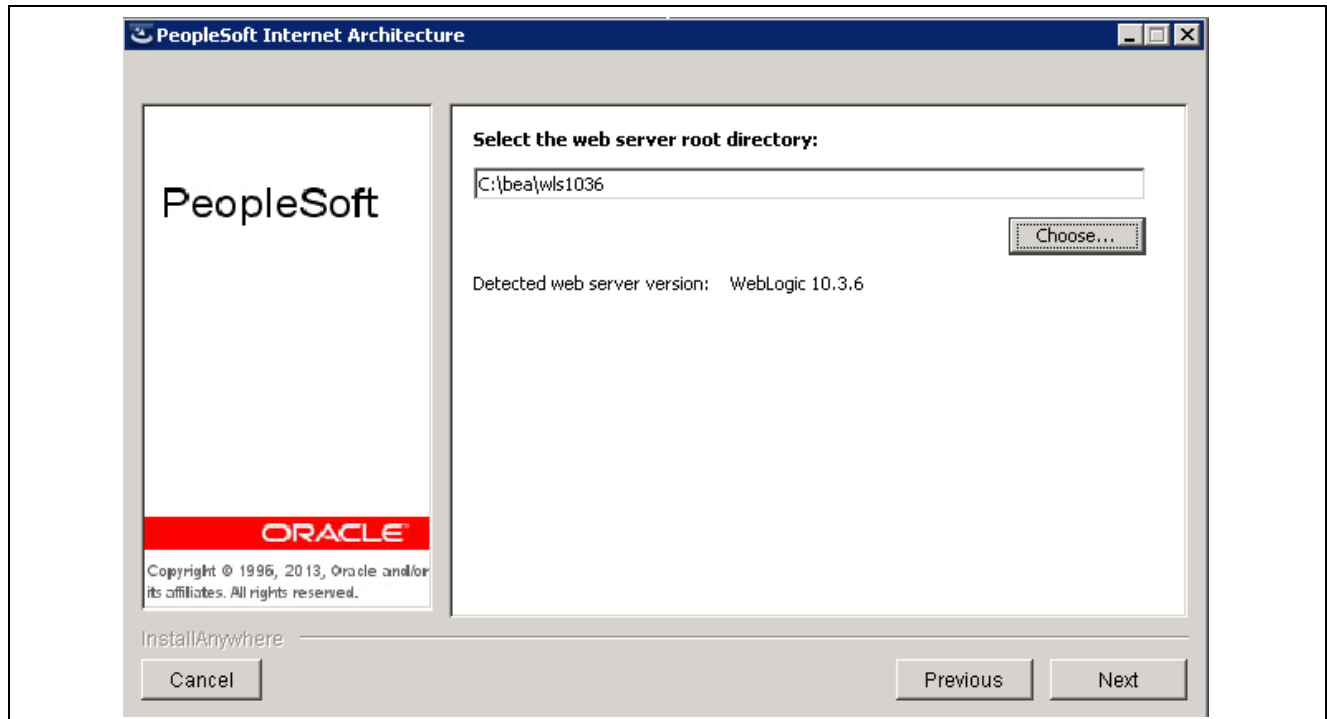
InstallAnywhere Wizard for PeopleSoft Internet Architecture- Select the web server directory

7. Enter the administrator credentials for the WebLogic domain that is provided during PIA creation, as shown in the following example:.

InstallAnywhere Wizard for PeopleSoft Internet Architecture-Enter the administrator credentials

8. Click Next until the page with the option to *Create New WebLogic or Existing WebLogic Domain* appears, as shown in the following example:

9. Select the Existing WebLogic Domain option and the Deploy additional PeopleSoft application extensions option, as shown in the following example:
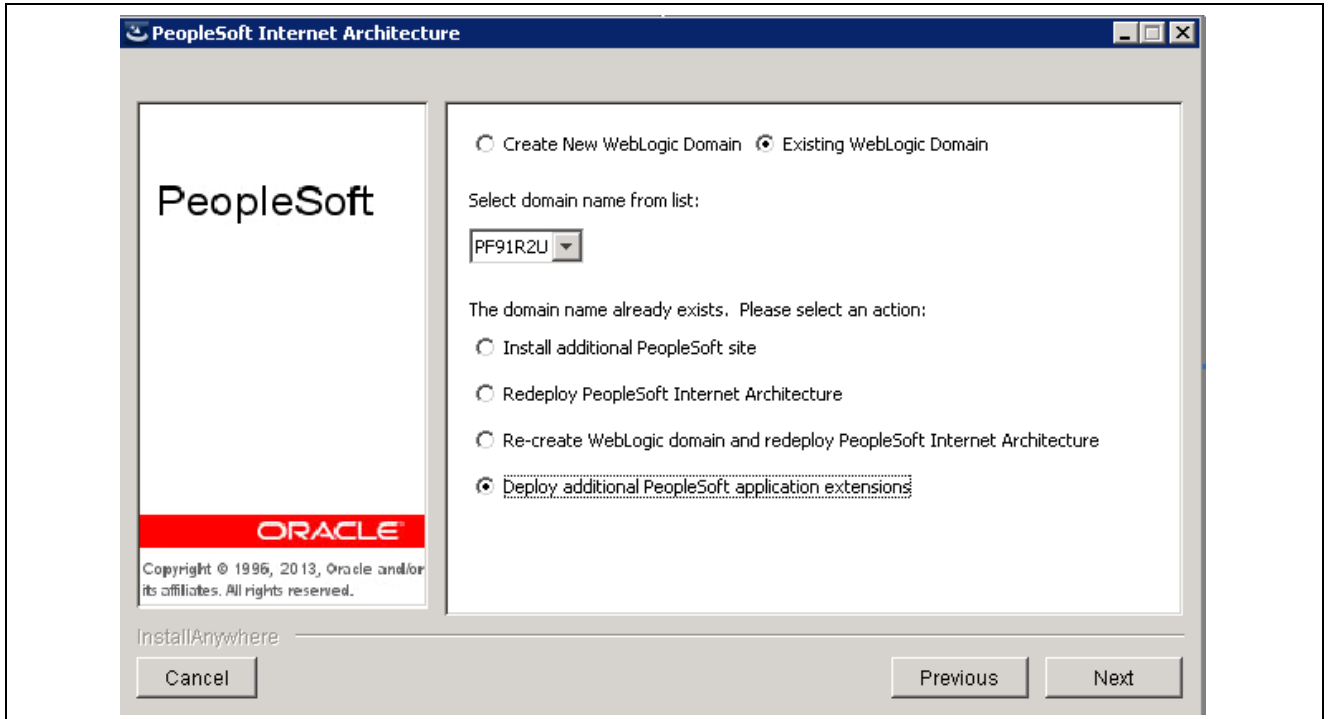
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Select an action for an existing domain options page

10. Enter the Integration Gateway credentials for the WebLogic domain that is provided during PIA creation, as shown in the following example:
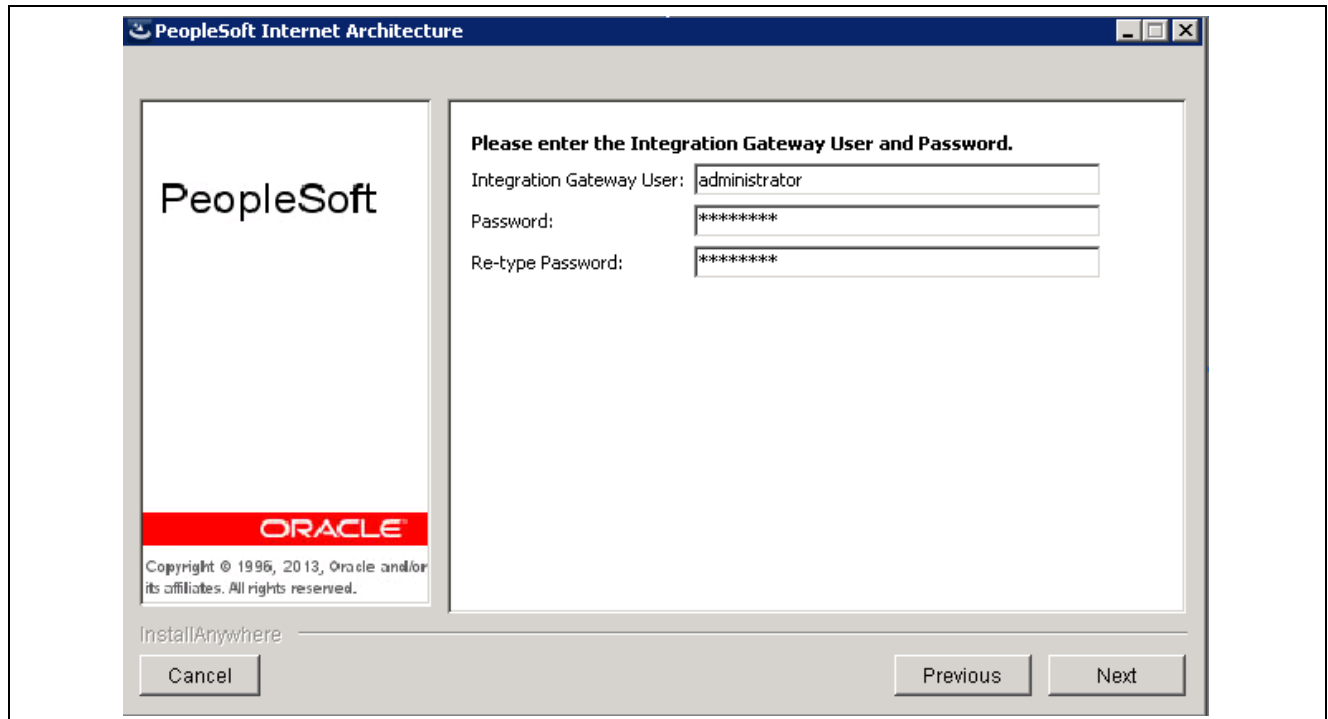
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Enter the Integration Gateway credentials

11. Enter the AppServer Domain password that was used during PIA and application server creation, as shown in the following example:
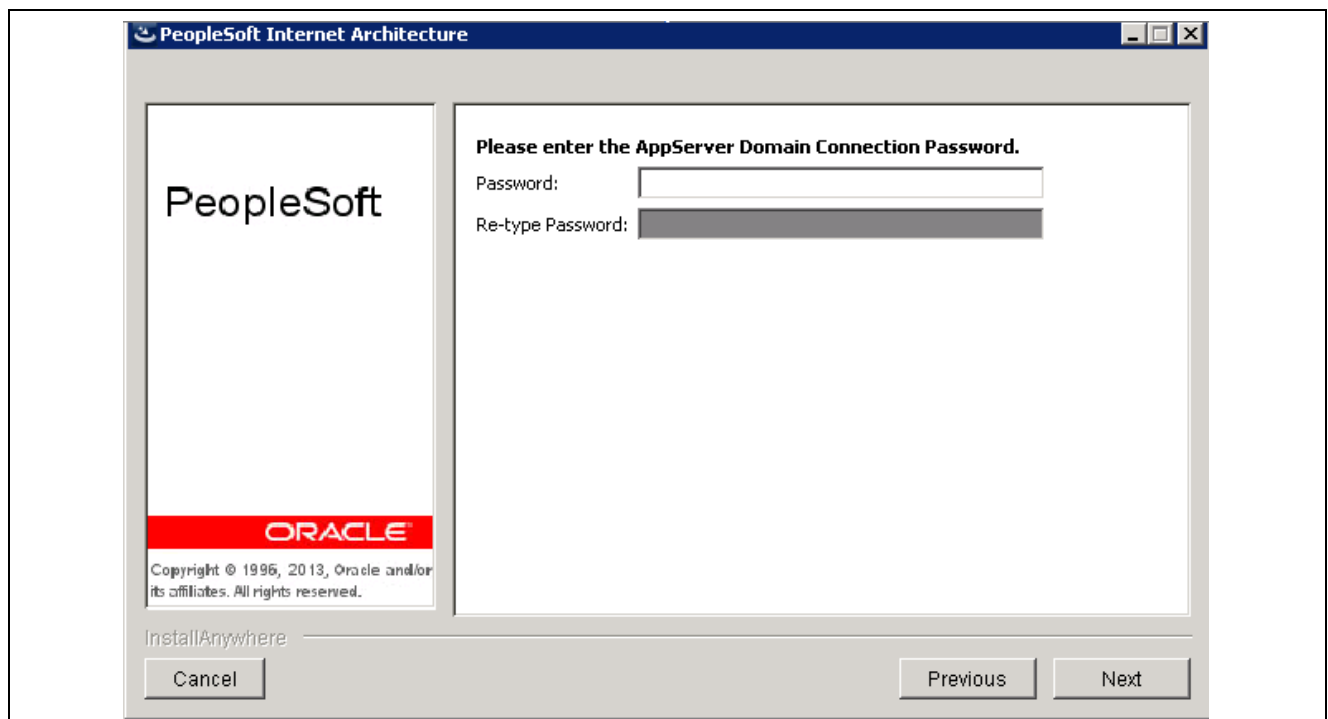
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Enter the AppServer Domain password

12. Enter the PS_APP_HOME directory where you have installed the EPM application
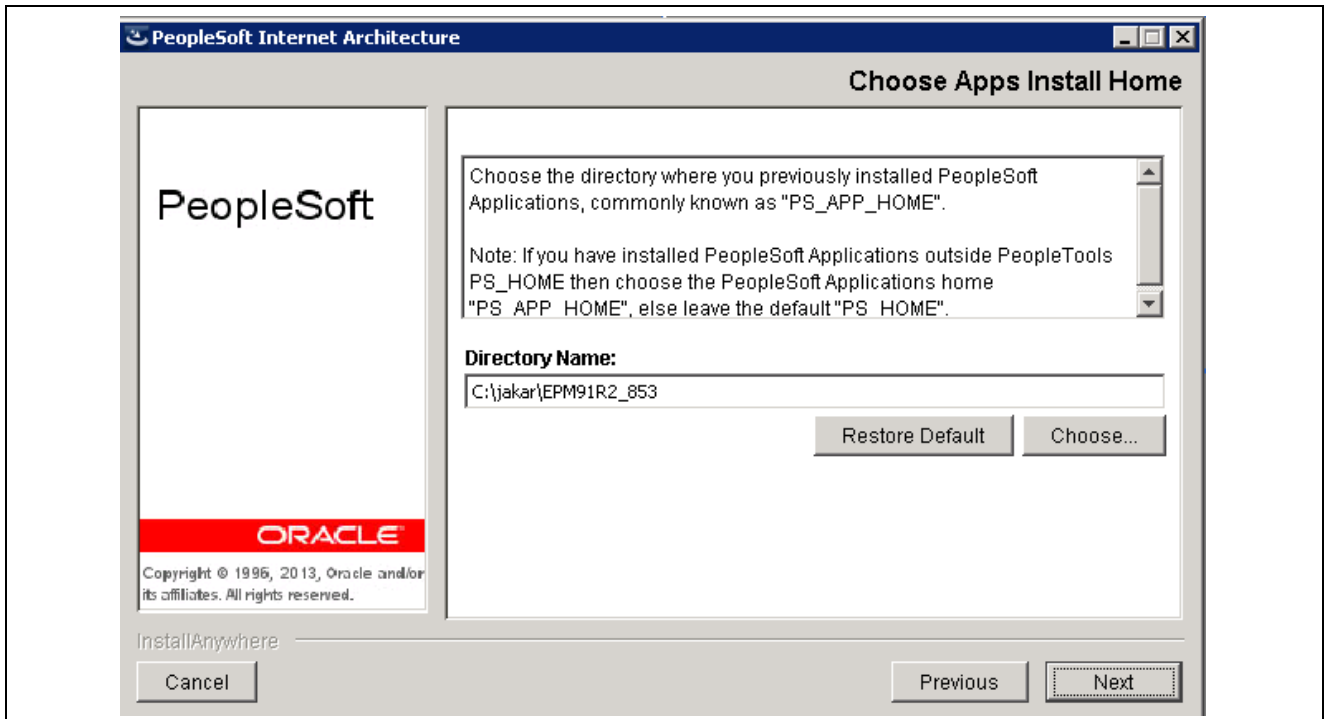
InstallAnywhere Wizard for PeopleSoft Internet Architecture -Enter the PS_APP_HOME directory

13. Click Next. The page with the option to *select the application package to deploy* appears, as shown in the following example:

14. On the page with the option *Please select the application package to deploy*, select all of the check boxes as appropriate. Click Next.

    The page with the option to *specify a name for the PeopleSoft website* appears, as shown in the following example:
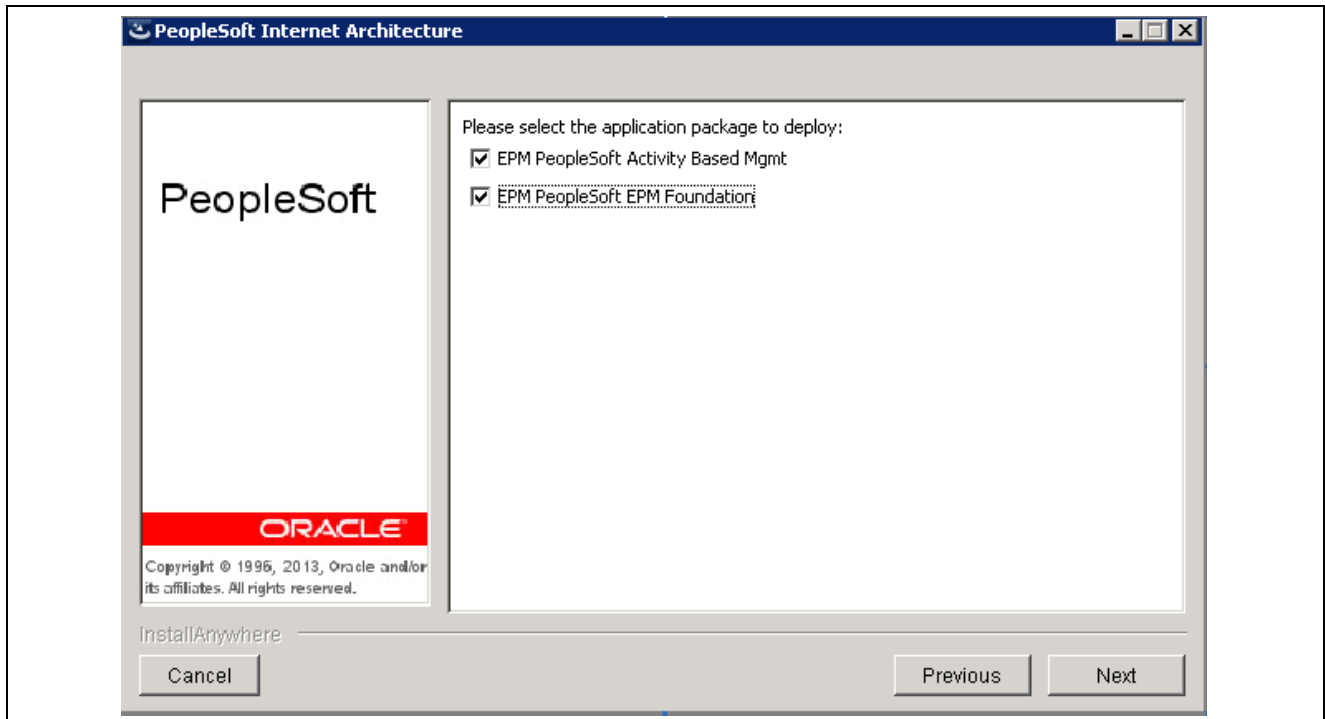
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Select the application package to deploy options page
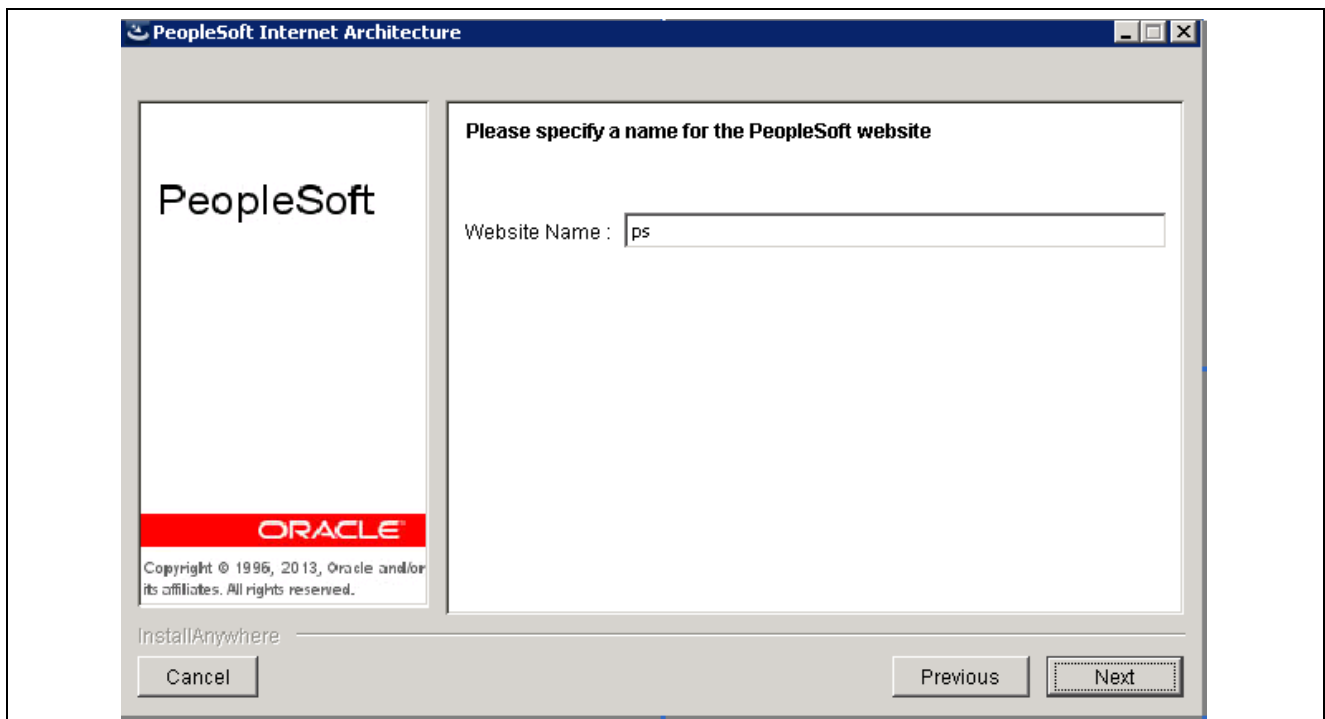
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Specify a name for the PeopleSoft website page

15. Select your PeopleSoft web site, the default is *ps*.

Click Next. The page with the option to *specify JSL and HTTP numbers* appears, as shown in the following example:

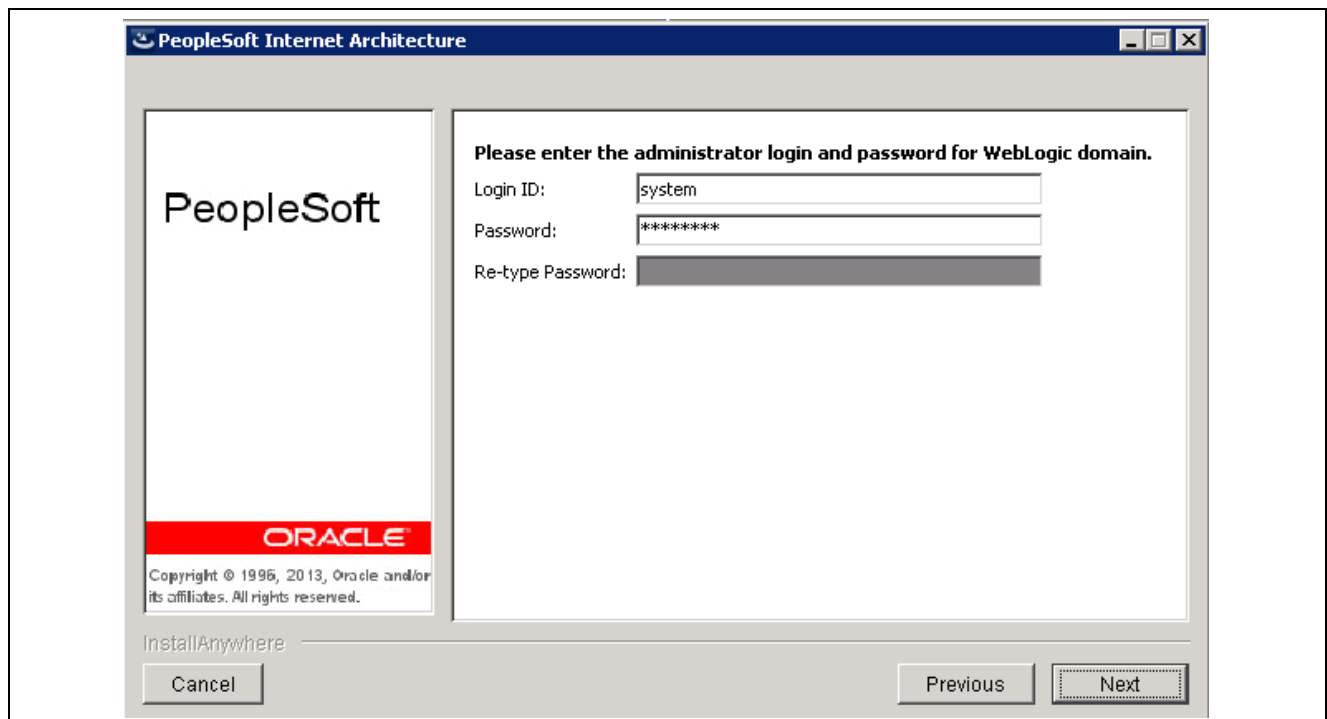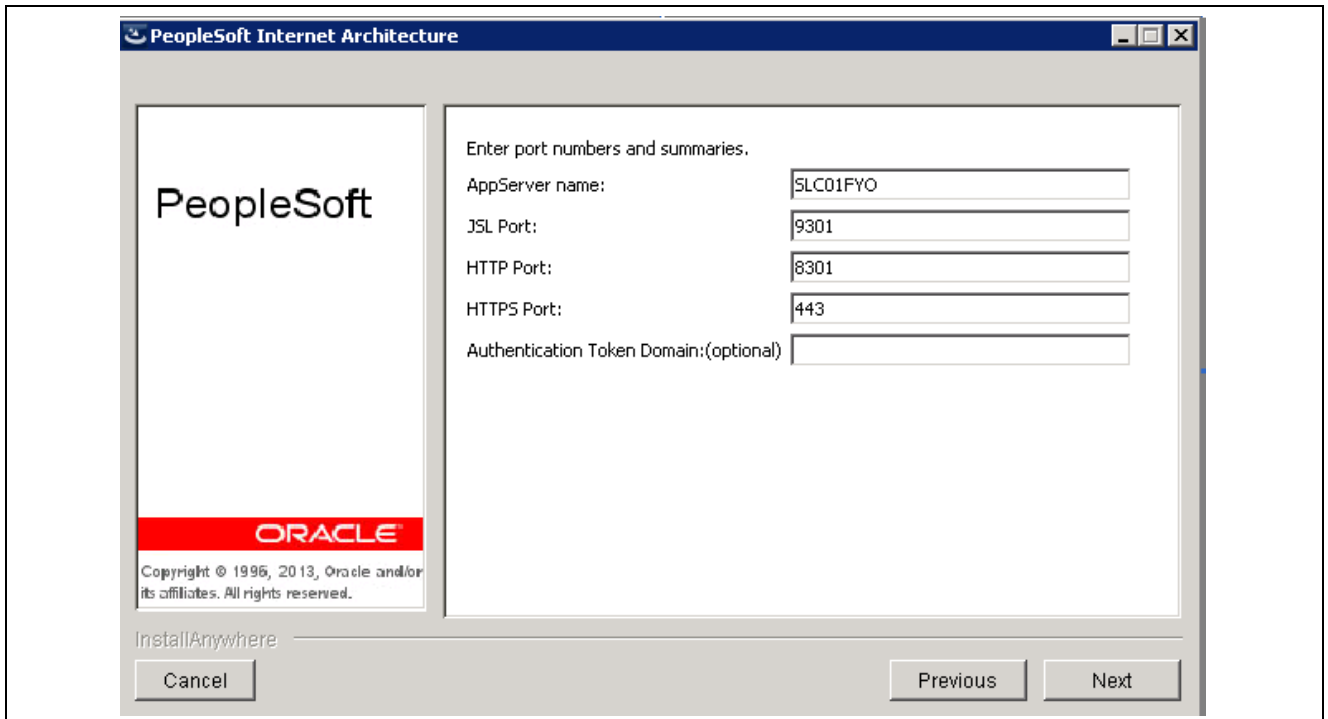InstallAnywhere Wizard for PeopleSoft Internet Architecture - Port numbers and summaries page

16. Specify the JSL and HTTP port numbers.

JSL port = your application server Jolt port number.

HTTP port = your PeopleSoft Pure Internet Architecture (PIA) Http port number.

Click Next. The page with the option to specify your *web profile name and sign in information* appears, as shown in the following example:
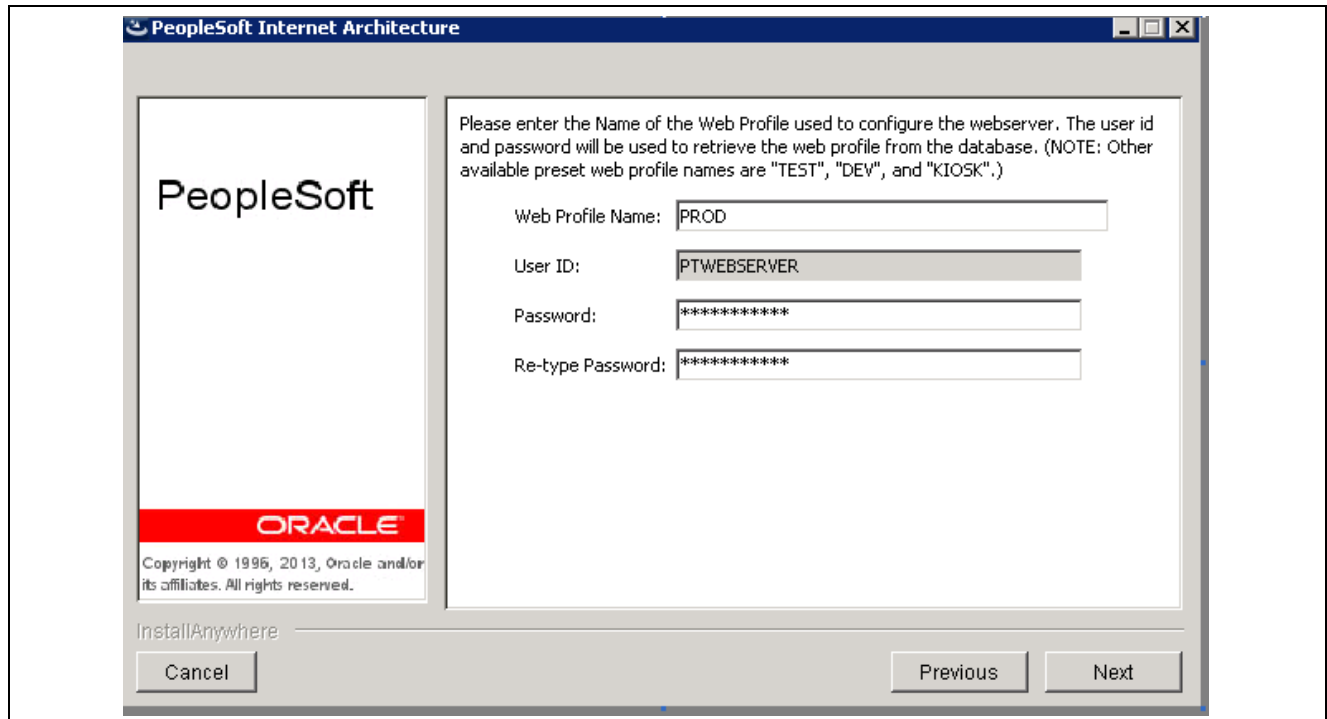
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Web profile name and sign in information page

17. In the Web Profile Name field, enter the name of the web profile that you want to use to configure the web server. Enter the user ID and password (the system uses this information to retrieve the web profile from the database).

Click Next until the installation summary and verification page appears, as shown in the following example:
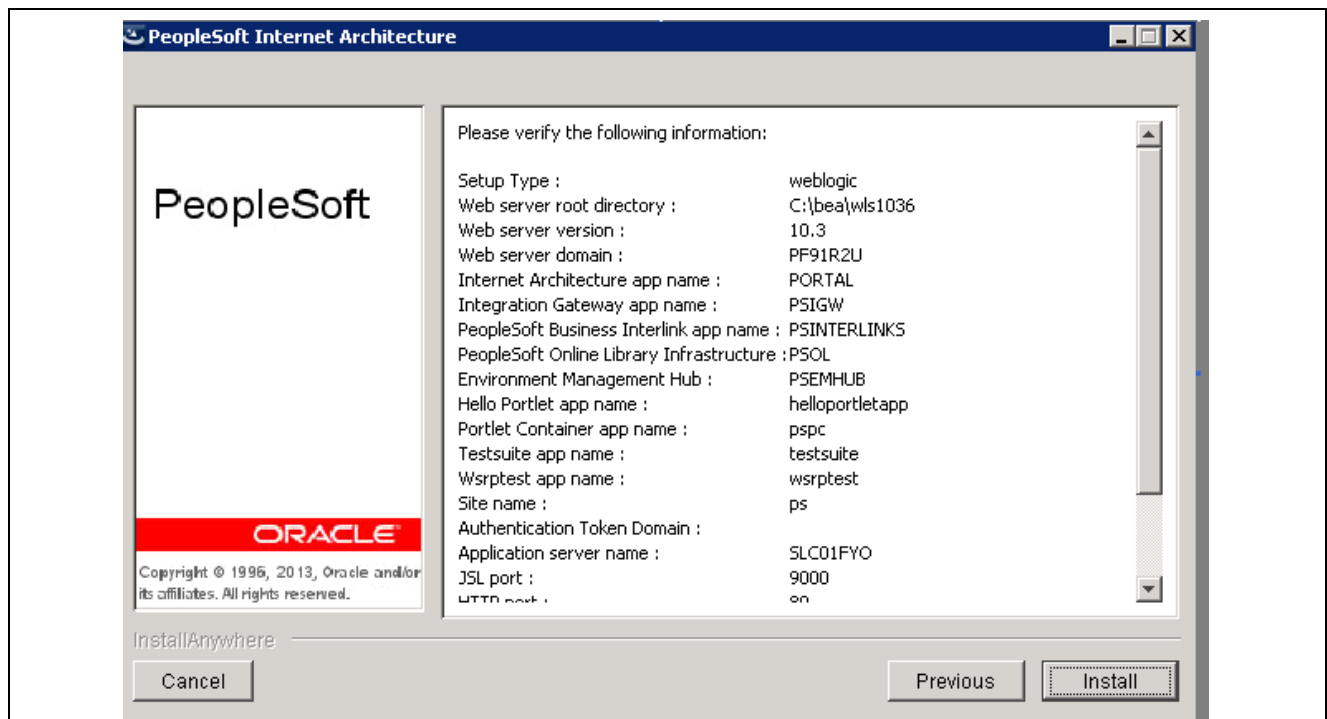
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Install summary verification page for Oracle WebLogic Server

18. Review your install criteria and then click the Install button to install the chart server and Java Applets for Real Time and Model Analyzer.

19. After you successfully install PeopleSoft application extensions, you must verify that the PeopleSoft EPM chart files are extracted to the appropriate directories by the system.

The following directory structures use *PIA_Domain* as the Application name. Substitute your actual Application name for *PIA_Domain.*

The system extracts the following files:

- charts2.jar
- com.peoplesoft.epm.pf.applet.jar
- openviz2.jar
- Left.gif
- Right.gif

    For Microsoft Windows for an Oracle WebLogic Server on *PeopleSoft PeopleTools 8.53*, the system extracts the files to:

    <PIA deploy folder>\webserv\<PIA_Domain>\applications\peoplesoft\PORTAL.war\peoplesoft8\psepm_pf

    For UNIX, the system extracts the files to:

    <PIA deploy folder>/webserv/<PIA_Domain>/applications/peoplesoft/PORTAL.war/peoplesoft8/psepm_pf

    Note. For Microsoft Windows for an Oracle WebLogic server on *PeopleSoft PeopleTools 8.53*, *PIA domain* is replaced by *peoplesoft* in the path.

    This is shown in the following example where the PIA deploy folder is C:\webserver\85203:

    C:\webserver\85203\webserv\peoplesoft\applications\peoplesoft\PORTAL.war\peoplesoft8\psepm_pf

20. After you successfully install PeopleSoft application extensions, you must verify that the PeopleSoft ABM Applet files are extracted to the appropriate directories by the system.

The following directory structures use *PIA_Domain* as the Application name. Substitute your actual Application name for *PIA_Domain.*

The system extracts the com.peoplesoft.epm.ab.applet.jar file.

For Microsoft Windows for an Oracle WebLogic server on *PeopleSoft PeopleTools 8.53*, the system extracts the com.peoplesoft.epm.ab.applet.jar file to:

<PIA deploy folder>\webserv\<PIA_Domain>\applications\peoplesoft\PORTAL.war\peoplesoft8\psepm_ab

For UNIX, the system extracts the files to:

<PIA deploy folder>/webserv/<PIA_Domain>/applications/peoplesoft/PORTAL.war/peoplesoft8/psepm_ab

---

Note. For Microsoft Windows for an Oracle WebLogic server on *PeopleSoft PeopleTools 8.53*, *PIA domain* is replaced by *peoplesoft* in the path.

This is shown in the following example where the PIA deploy folder is C:\webserver\85203:

C:\webserver\85203\webserv\peoplesoft\applications\peoplesoft\PORTAL.war\peoplesoft8\psepm_ab

---

Task 1-12-3: Installing for an IBM WebSphere Server

To install the charting tool for an IBM WebSphere Server:

Note. These instructions use *<PS_HOME>* for Microsoft Windows and UNIX platforms to refer to the location to which PeopleSoft PeopleTools is installed on your machine, for example C:\PT8.53. Substitute your actual PeopleTools path for *<PS_HOME>* for Microsoft Windows and UNIX platforms.

---

1. Launch the PeopleSoft Internet Architecture Install and Configure utility by launching setup.bat or setup.jar:

    For Microsoft Windows, the set up file is located at: *<PS_HOME>*\setup\PsMpPIAInstall\

    For UNIX, the set up file is located at: *<PS_HOME>*/setup/PsMpPIAInstall/.

    The following page or a similar one appears and displays the number that reflects the PeopleSoft PeopleTools version that you have installed, as shown in this example:
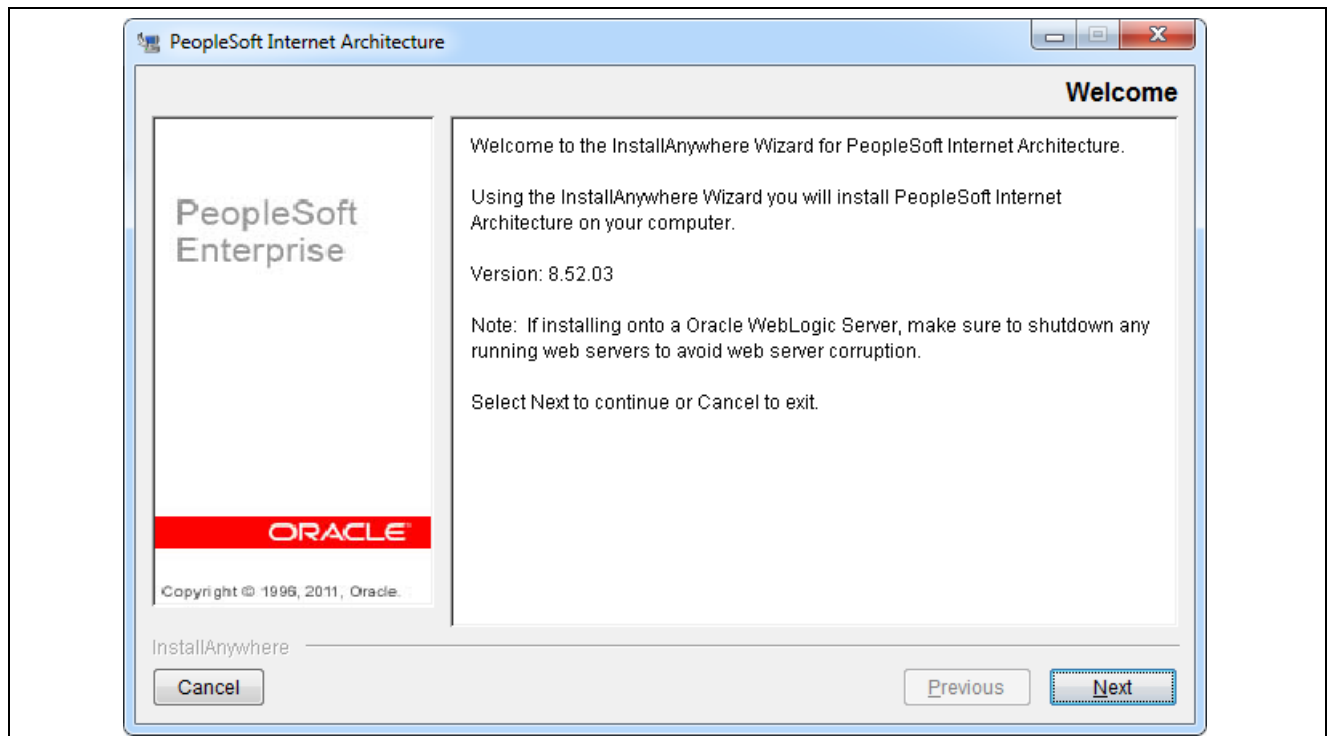
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Welcome page

    Click Next. The page with the option to *choose the directory where you wish to deploy PeopleSoft Pure Internet Architecture* appears, as shown in the following example:
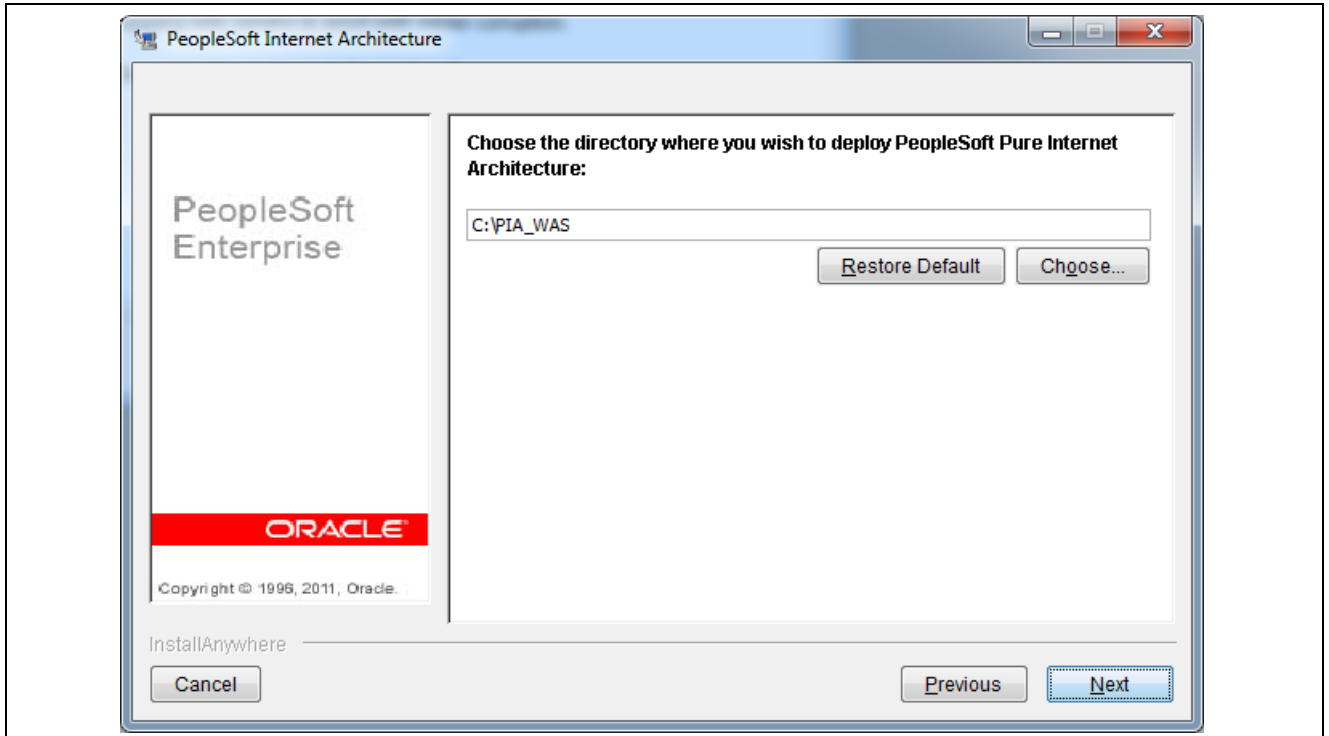
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Choose directory to deploy PeopleSoft Pure Internet Architecture

2. Enter the directory where you originally deployed PeopleSoft Pure Internet Architecture (note that you are deploying application extensions in this task).

3. Click Next until the page with the option to *choose the installation type* appears, as shown in the following example:

InstallAnywhere Wizard for PeopleSoft Internet Architecture - Choose the installation type options page

4. Select the IBM WebSphere Server option.

5. Click Next until the page with the option to *select the WebSphere Application Server directory* appears, as shown in the following example:
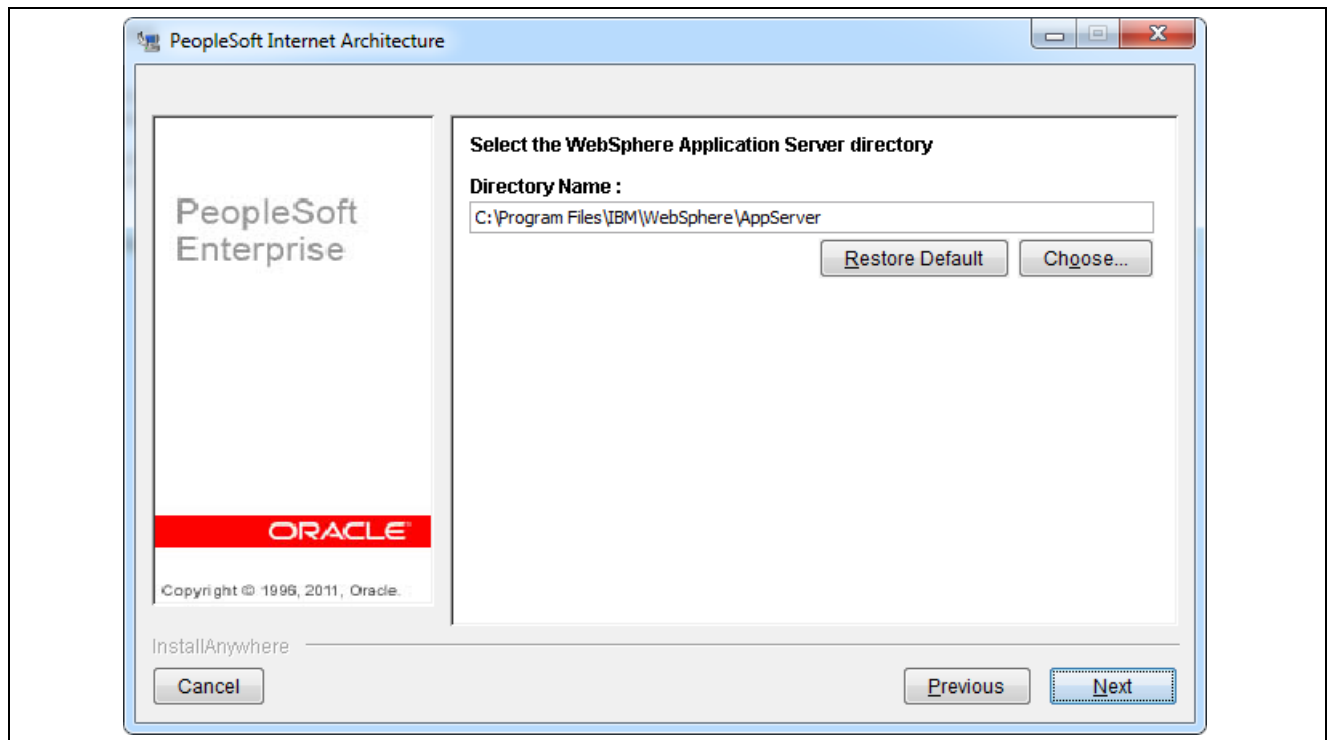
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Choose the WebSphere Application Server directory options page

6. Select the location of your IBM WebSphere Application Server Directory.

7. Click Next until the page with the options to *Create a New or Create an Existing WebSphere domain* appears, as shown in the following example:
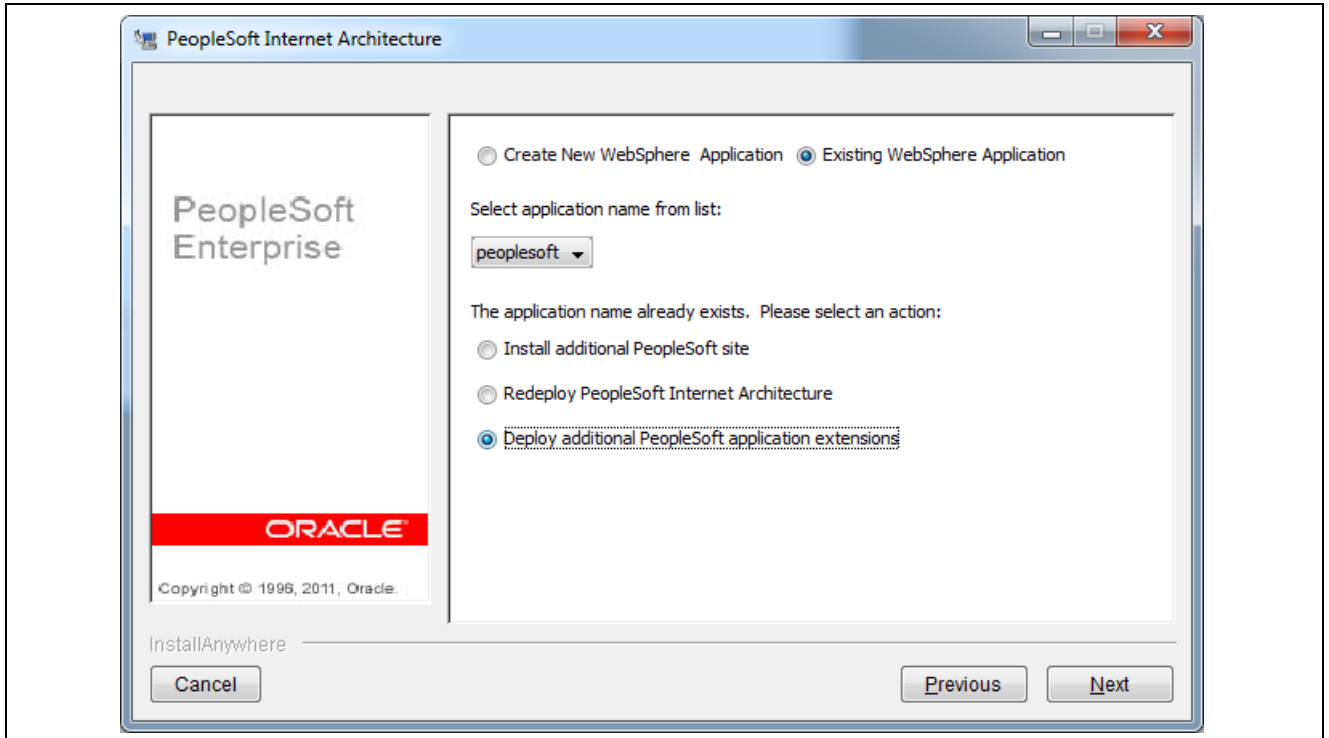
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Create New or Existing WebLogic domain options page

8. Select the Existing WebSphere and Deploy additional PeopleSoft application extensions options, and then click Next.

    Click Next. The page with the option to *select the application package to deploy* appears, as shown in the following example:
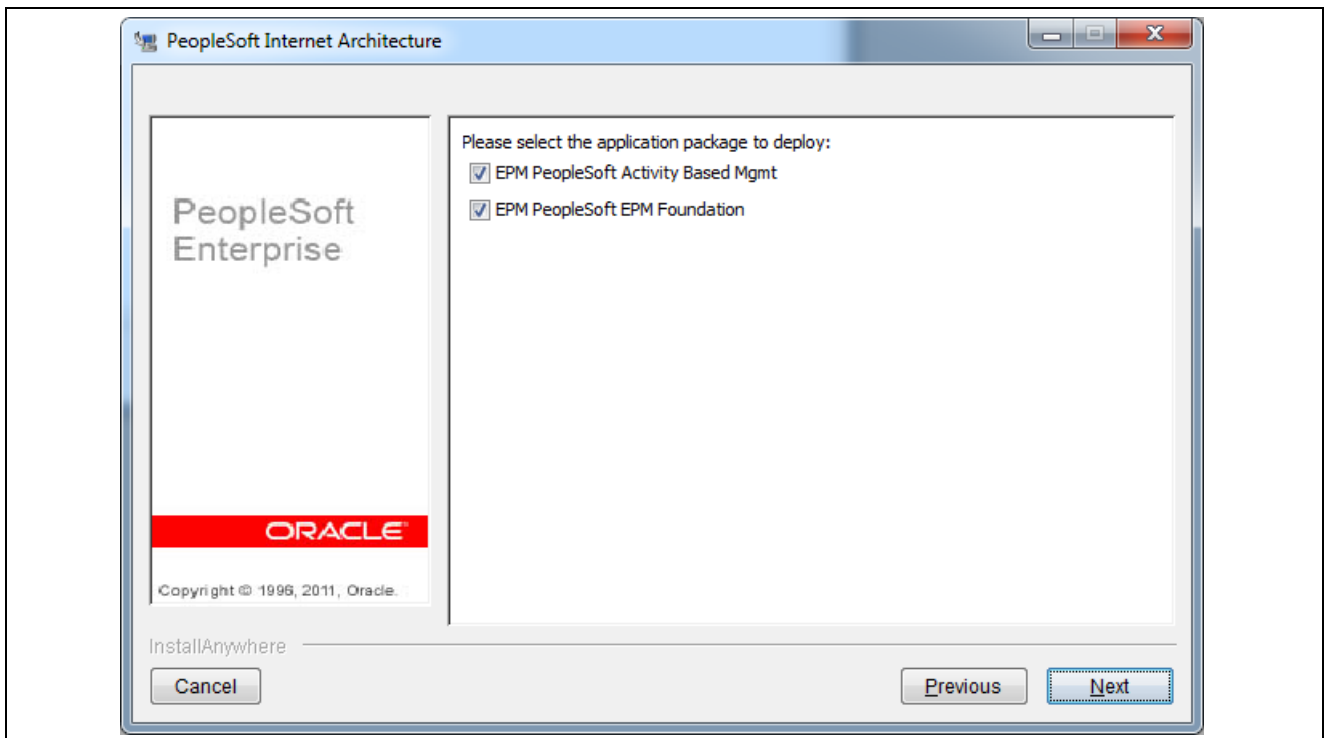
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Select the application package to deploy options page

9. Select all of the check boxes as appropriate.

    Click Next. The page with the option to *specify a name for the PeopleSoft website* appears, as shown in the following example:
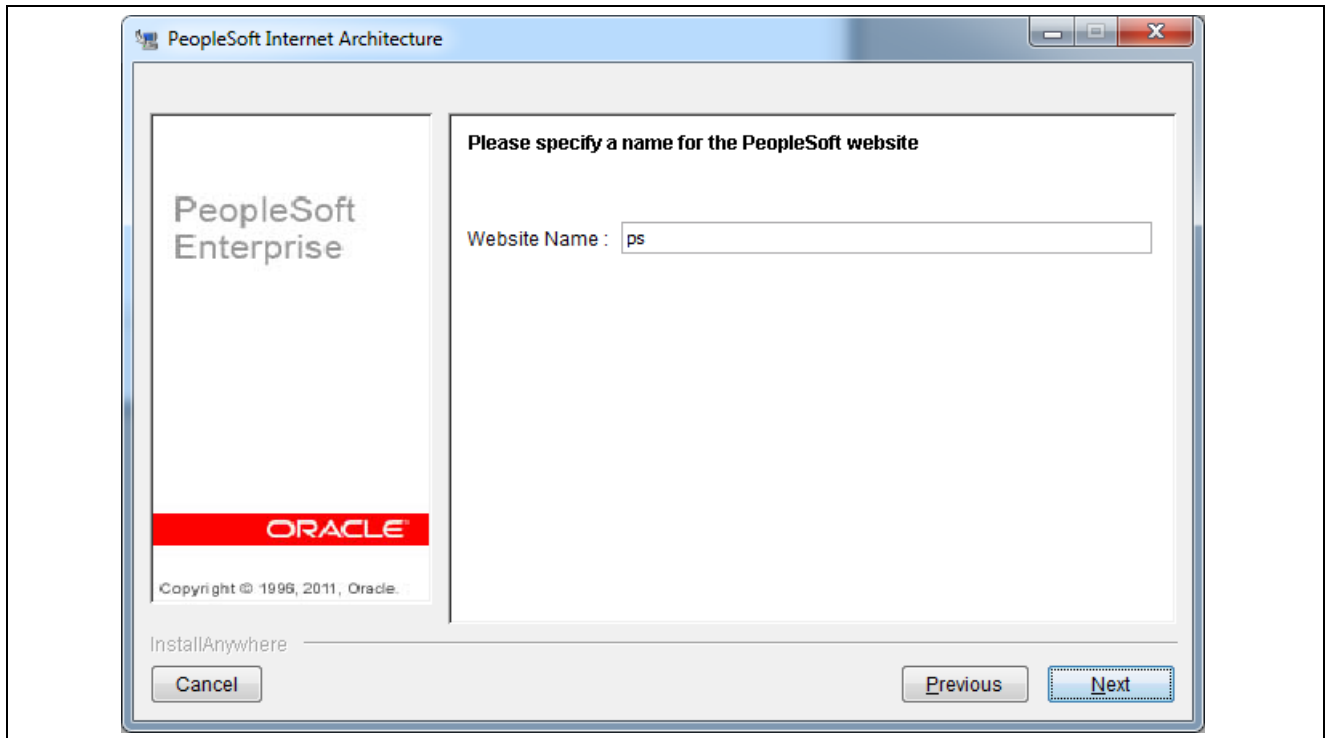
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Specify a name for the PeopleSoft website page

10. Select your PeopleSoft web site, the default is *ps*.

    Click Next. The page with the option to *specify the JSL and HTTP port numbers* appears, as shown in the following example:
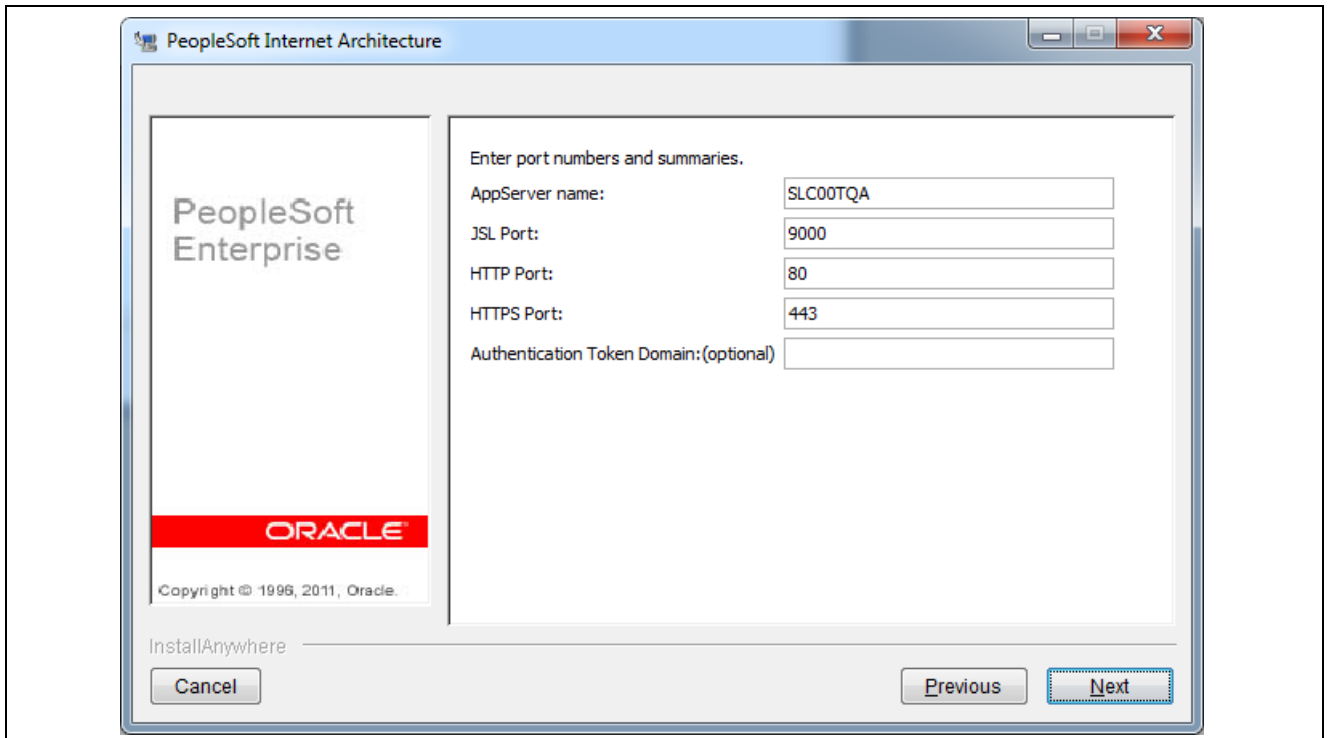
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Port numbers and summaries page

11. Specify your JSL and HTTP port numbers.

JSL port = your application server Jolt port number.

HTTP port = your PeopleSoft Pure Internet Architecture (PIA) Http port number.

Click Next. The page with the option to specify your *web profile name and sign in information* appears, as shown in the following example:
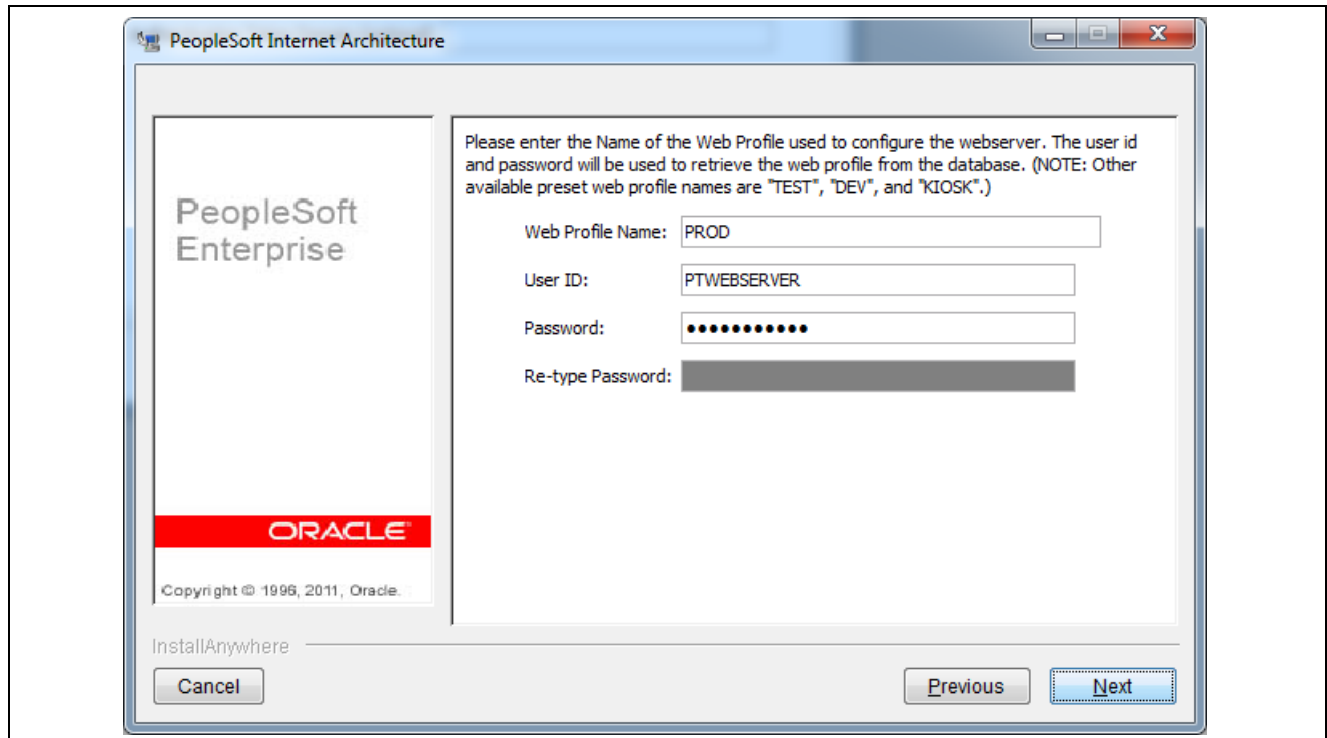
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Web profile name and sign in information page

12. In the Web Profile Name field, enter the name of the web profile that you want to use to configure the web server. Enter the user ID and password (the system uses this information to retrieve the web profile from the database).

Click Next until the Install Summary page appears, as shown in the following example:
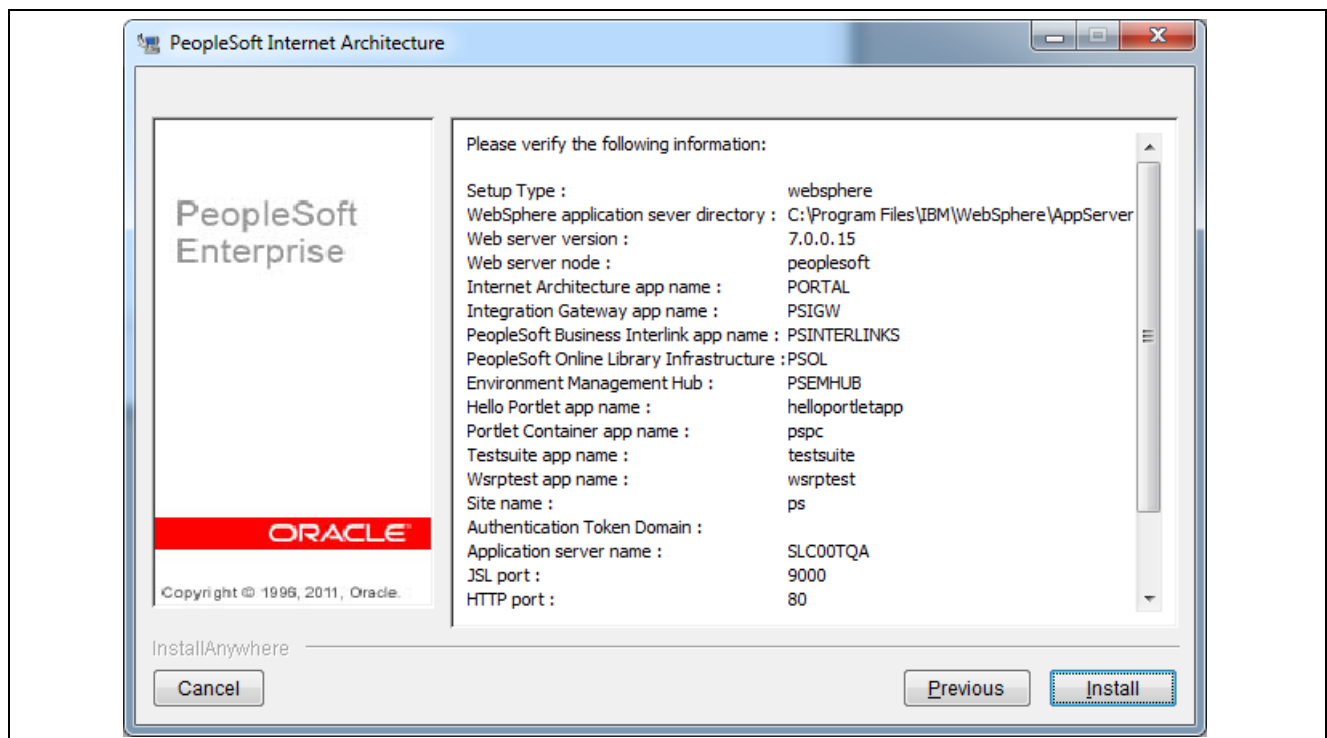
InstallAnywhere Wizard for PeopleSoft Internet Architecture - Install summary verification page for IBM WebSphere Server

13. Review your install criteria and then click the Install button to install the chart server and Java Applets for Real Time and Model Analyzer.

14. After you successfully install PeopleSoft application extensions, you must verify that the PeopleSoft EPM chart files are extracted to the appropriate directories by the system. The following directory structures use *<PIA_Application>* as the Application name. Substitute your actual Application name for *<PIA_Application>*.

    The system extracts the following files:

    • charts2.jar

    • com.peoplesoft.epm.pf.applet.jar

    • openviz2.jar

    • Left.gif

    • Right.gif

    For Microsoft Windows for an IBM WebSphere server on PeopleTools PeopleTools 8.53, the system extracts the com.peoplesoft.epm.pf.applet.jar file to:

    <PIA deploy folder>\webserv\PIA_Application\installedApps\PIA_ApplicationNodeCell\PIA_ Application.ear \PORTAL.war\peoplesoft8\psepm_pf

    For UNIX, the system extracts the files to:

    <PIA deploy folder>/webserv/PIA_Application/installedApps/PIA_ApplicationNodeCell/PIA_ Application.ear/PORTAL.war/peoplesoft8/psepm_pf

    ---

    Note. For Microsoft Windows for an IBM WebSphere server on PeopleSoft PeopleTools 8.53, *PIA_Application* is replaced by *peoplesoft* in the path, as shown in the following example where the PIA deploy folder is C:\PIA_WAS:

    C:\PIA_WAS\webserv\peoplesoft\installedApps\peoplesoftNodeCell\peoplesoft.ear\PORTAL.war \peoplesoft8\psepm_pf

    ---

15. After you successfully install PeopleSoft application extensions, you must verify that the PeopleSoft ABM Applet files are extracted to the appropriate directories by the system.

    The following directory structures use *PIA_Application* as the Application name. Substitute your actual Application name for *PIA_Application.*

    The system extracts the com.peoplesoft.epm.ab.applet.jar file.

    For Microsoft Windows for an IBM WebSphere Server on PeopleSoft PeopleTools 8.53, the system extracts the com.peoplesoft.epm.ab.applet.jar file to:

    <PIA deploy folder>\webserv\PIA_Application\installedApps\PIA_ApplicationNodeCell\PIA_ Application.ear \PORTAL.war\peoplesoft8\psepm_ab

    For UNIX, the system extracts the files to:

    <PIA deploy folder>/webserv/PIA_Application/installedApps/PIA_ApplicationNodeCell/PIA_ Application.ear/PORTAL.war/peoplesoft8/psepm_ab

> **Note.** For Microsoft Windows for an IBM WebSphere server on PeopleSoft PeopleTools 8.53, *PIA_Application* is replaced by *peoplesoft* in the path, as shown in the following example where the PIA deploy folder is C:\PIA_WAS:
>
> C:\PIA_WAS\webserv\peoplesoft\installedApps\peoplesoftNodeCell\peoplesoft.ear\PORTAL.war \peoplesoft8\psepm_ab

Task 1-12-4: Configuring PeopleSoft Applications to Enable Charting
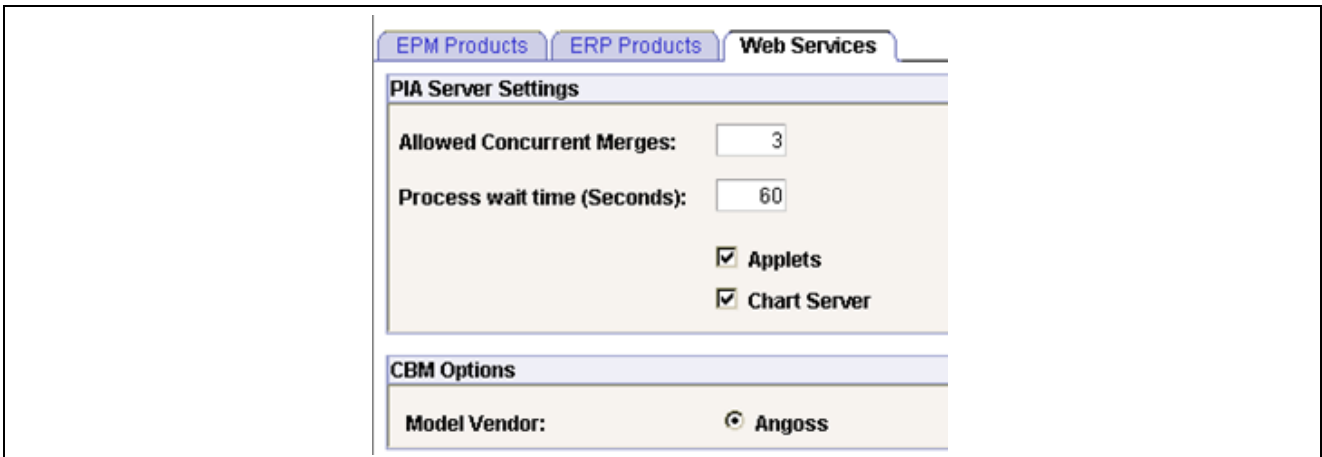
To configure the applications to use the charting tool:

1. Select EPM Foundation, EPM Setup, Installation Analysis & Options, Installation Options.

2. Select the Web Services tab.

3. Ensure that the Chart Server check box is selected to enable the basic charting features.

PeopleSoft Enterprise Scorecard and PeopleSoft Enterprise Activity-Based Management use applets to provide enhanced charting abilities.

To enable these advanced features:

1. On the Web Services tab, select the Applets check box, as shown in the following example:

Installation Options - Web Services page showing the Applets check box selected

Be aware, however, that applets download code to the client workstation.

2. Save the page.

3. Log out of the application.

Task 1-13: Installing and Configuring PeopleSoft Planning and Budgeting

PeopleSoft Planning and Budgeting uses the PeopleSoft PeopleTools Analytic Calculation Engine (ACE) as the primary calculation tool for planning models. PeopleSoft ACE is installed during the normal installation process for PeopleSoft PeopleTools. Configuration of the PeopleSoft ACE components may be necessary to optimize your environment.

For more information about the administration of the analytic servers that PeopleSoft ACE uses, see the *PeopleTools: System and Server Administration,* "Managing Analytic Servers," for your current release of PeopleTools.

Task 1-14: Installing the PeopleSoft Planning and Budgeting Spreadsheet Add-In Program

This section discusses:

• Defining Software Requirements

• Installing the PeopleSoft BP-Spreadsheet Add-In

• Verifying the Installation of the PeopleSoft BP-Spreadsheet Add-In

• Reviewing Troubleshooting Tips for Microsoft Excel to PeopleSoft BP Add-In Installation

The PeopleSoft Planning and Budgeting Spreadsheet Add-In program consists of a single Microsoft Excel file, ExcelToCI-BP.xls. This spreadsheet must be available on all machines that plan to use the Spreadsheet Add-In program to work with the PeopleSoft Planning and Budgeting application. The file ExcelToCI-BP.xls resides on the File server at:

<PS_HOME>\excel\ExcelToCI-BP.xls

Note. In a decoupled environment, this file is located in *<PS_APP_HOME>*\excel\ExcelToCI-BP.xls.

If you do not have a decoupled environment, this file is located in *<PS_HOME>*\excel\ExcelToCI-BP.xls.

Note. PeopleSoft EPM supports the same Microsoft Excel versions that PeopleSoft PeopleTools 8.53 supports. For more information, see the PeopleSoft PeopleTools installation and implementation documentation for your database platform.

Defining Software Requirements

The PeopleSoft Planning and Budgeting Spreadsheet Add-In utility is available only for Microsoft Office and specifically requires the Microsoft XML parser, *msxml4.dll*. This utility supports the same versions of Microsoft Office as PeopleSoft PeopleTools supports.

Some applications overwrite previous versions of this file with another version, occasionally causing the utility to malfunction. You should use Microsoft XML 4 (MSXML 4), Service Pack 2, because it can coexist with older versions of the parser.

The following required software must be installed for the spreadsheet add-in to work successfully:

• MSXML 4, Service Pack 2. Microsoft XML parser MSXML.

You can download and reinstall this software from the Microsoft web site, located at:

http://www.microsoft.com/downloads/details.aspx?FamilyID=3144b72b-b4f2-46da-b4b6-c5d7485f2b42&displaylang=en

• Visual Basic 6.0 SP5: Run-Time Redistribution.

You can install this software from the Microsoft web site, located at:

http://www.microsoft.com/downloads/details.aspx?FamilyID=bf9a24f9-b5c5-48f4-8edd-cdf2d29a79d5&displaylang=en

For more information on these service packs, see the Microsoft downloads web site.

Task 1-14-1: Installing the PeopleSoft BP-Spreadsheet Add-In

To install the PeopleSoft BP-Spreadsheet Add-In program:

1. Copy the file ExcelToCI-BP.xls from the File server to the directory, C:\peoplesoft-apps\bg\ on the user machine or the standard PeopleSoft directory C:*PS_HOME*\bg\ if it exists.

2. Create a shortcut on the desktop and name it "*BP-SpreadsheetAdd-In*" for launching the PeopleSoft BP-Spreadsheet Add-In program.

3. Launch the PeopleSoft BP-Spreadsheet Add-In program to open the workbook.

4. For *Microsoft Excel 2007*, do the following:

Enable the Developer menu to access the options to work with Macros. In Microsoft Excel 2007, the Developer menu is not automatically enabled and does not appear on the menu ribbon in the default view of the Microsoft Excel workspace. After you enable the Developer menu it appears to the far right on the menu ribbon.

To enable the Developer menu in Microsoft Excel 2007:

a. Launch Microsoft Excel 2007.

b. In the upper left corner of the workspace, click the circular Microsoft Office icon.

The Recent Documents menu appears.

c. Click the Excel Options button at the top of the menu.

The Excel Options page appears.

d. Under the Popular category, in the Top options for working with Excel selection, select the Show Developer tab in the Ribbon option.

To enable Macros in Microsoft Excel 2007:

e. Select the Developer tab, as in the following example that shows the Developers tab and available options, including the Macro Security icon:
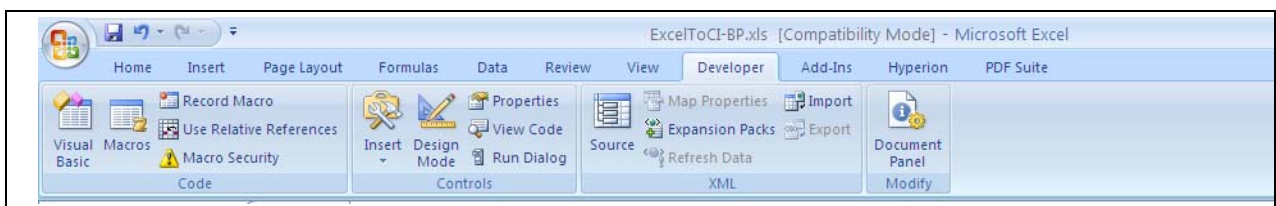
Microsoft Excel 2007: Developer tab

f. Click the Macro Security icon.

g. Select the Enable all macros option.

Alternatively, you can select the following:

In the Macro Settings section of the Trust Center, select the Disable all macros with notification option, as shown in the following example:
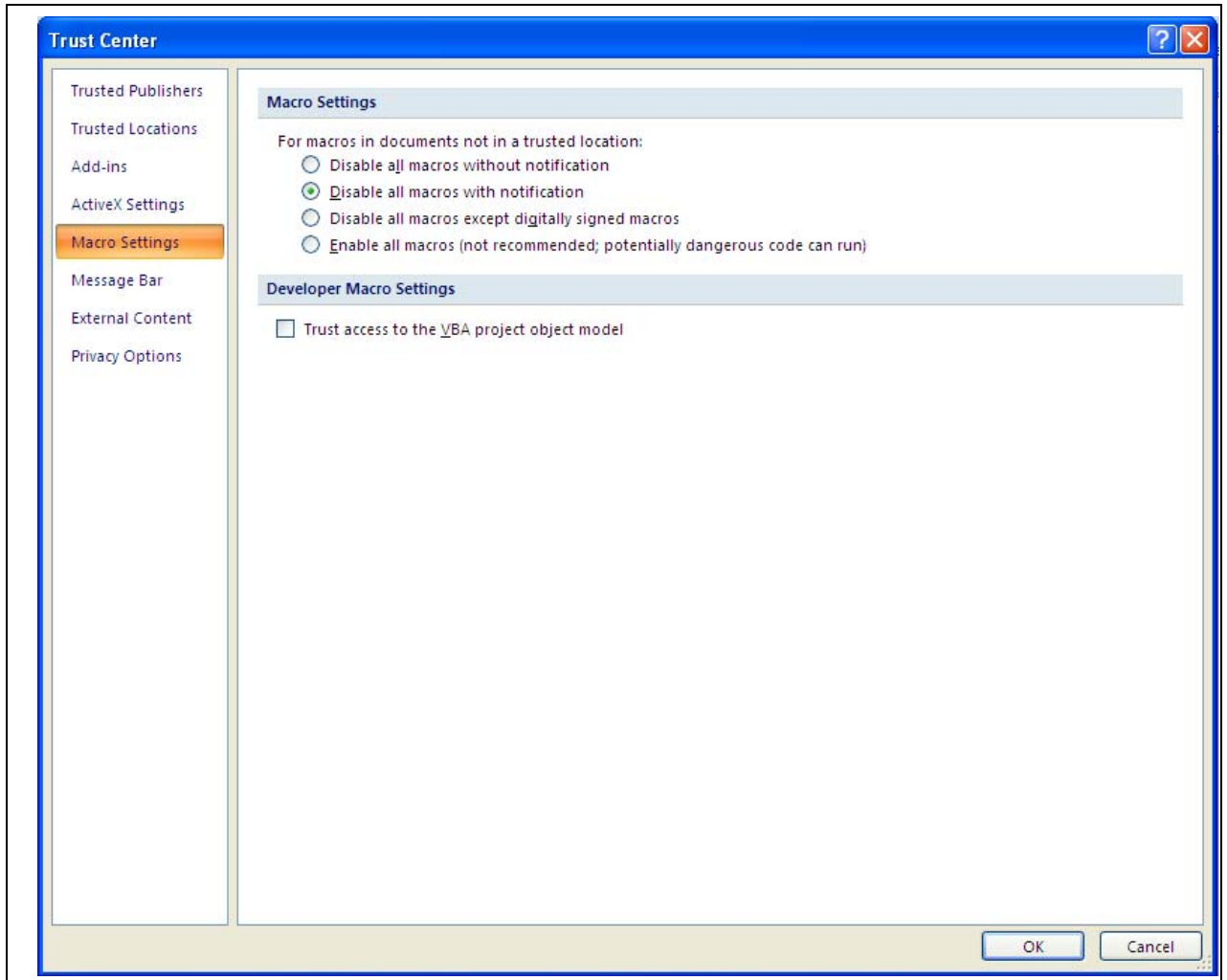
Trust Center Macro Settings

In the Message Bar section of the Trust Center, select the Show the Message Bar in all applications when content has been blocked option, as shown in the following example:

33
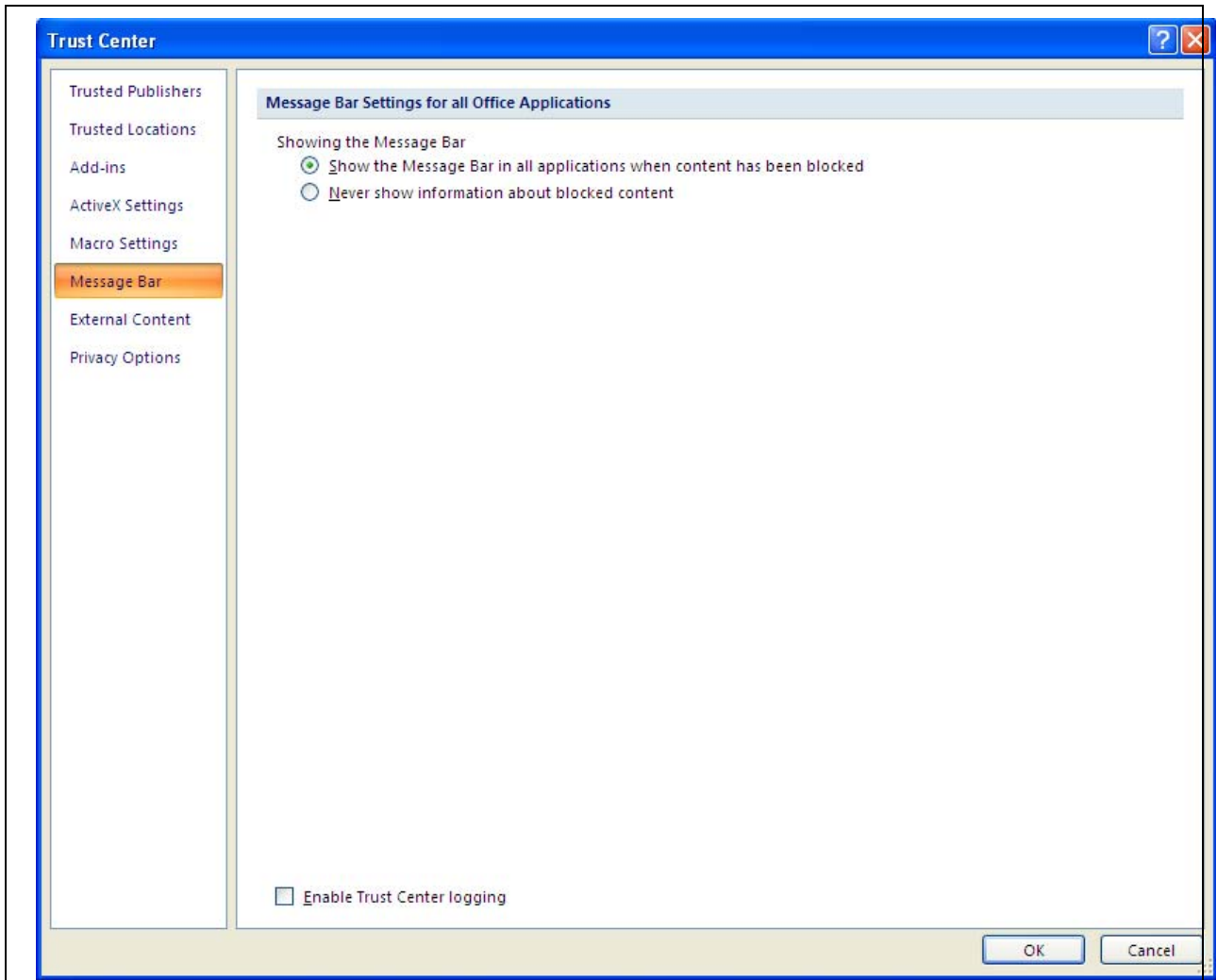
Trust Center Message Bar

5. To enable the Developer tab in Microsoft Excel 2010, do the following:

   a. Launch Microsoft Excel 2010.

   b. Click the File tab and then click the Options button.

      The Excel Options page appears, as shown in the following example:
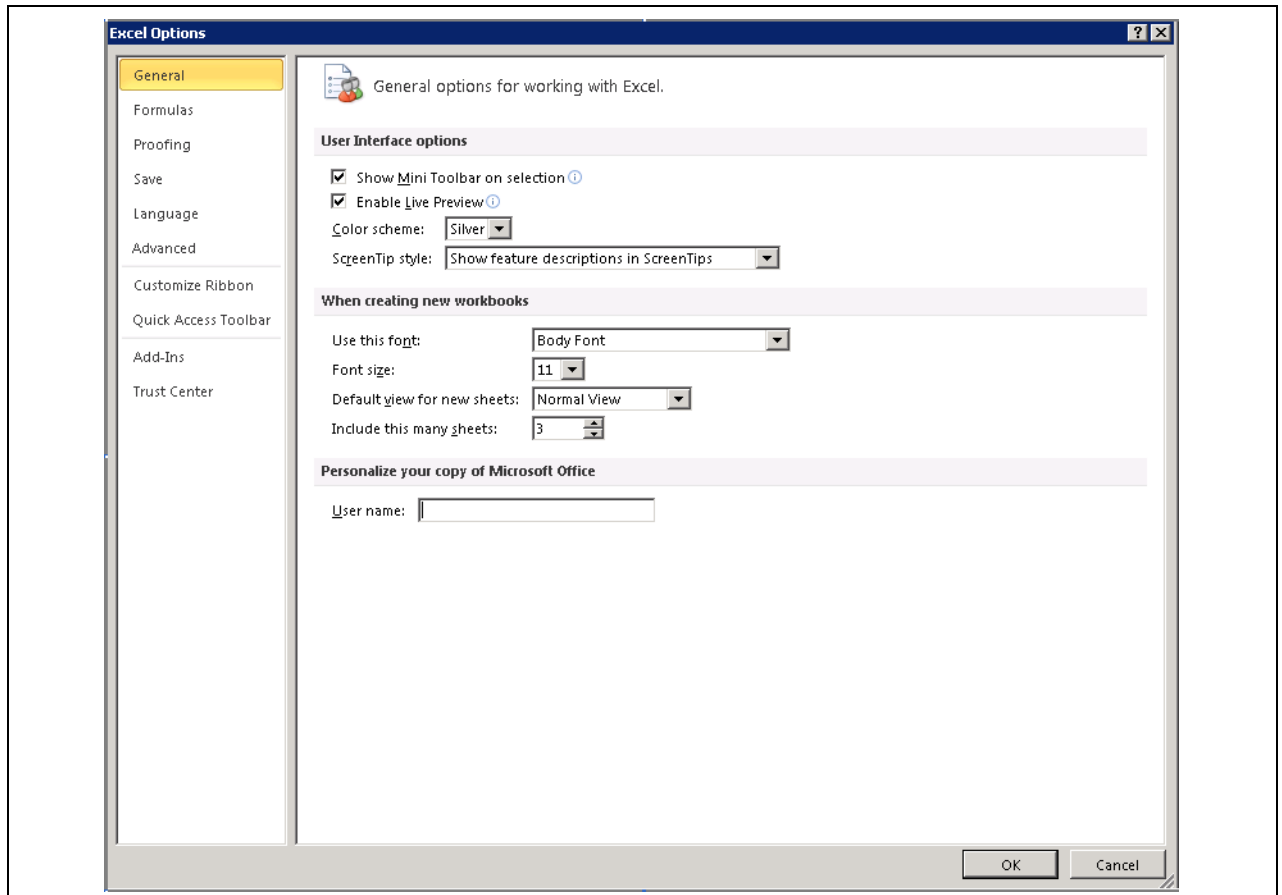
Microsoft Excel 2010: Excel Options

c. Click the Customize Ribbon category.

d. Under the Main Tabs, select the Developer check box as shown in the following example:
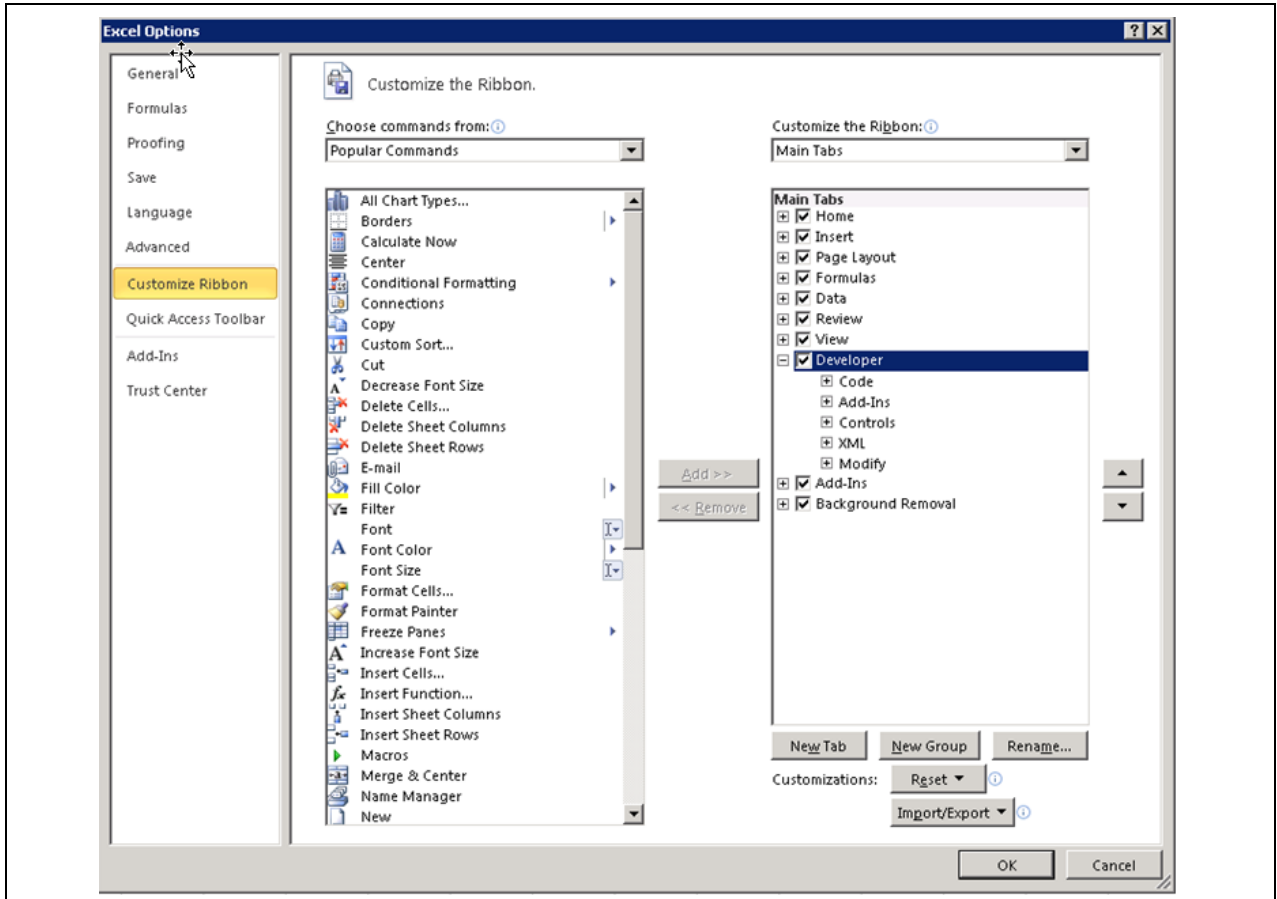
Microsoft Excel 2010: Developer check box

   e. Click OK.

6. For *Microsoft Excel 2007* and *Microsoft Excel 2010*, do the following:

   Select the Developer tab, click the Visual Basic icon as shown in the following example, to launch the Visual Basic editor:
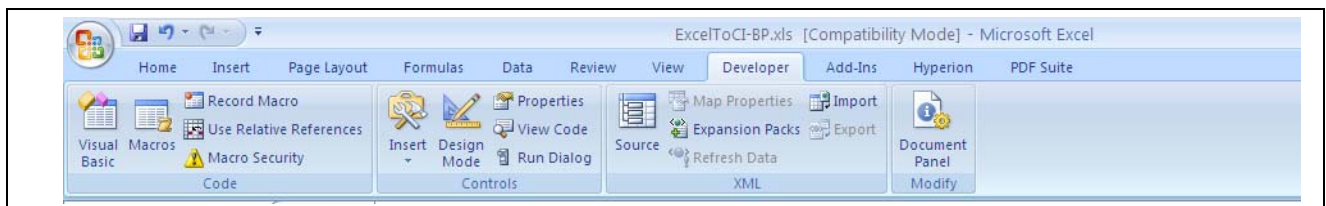
Microsoft Excel 2007: Developer tab

7. In the Visual Basic editor, open the Tools menu and then select References to display the dialog box, as shown in the example that follows.

8. The following check boxes in the Available References dialog box must be selected:

Note. These options may differ depending on the version of Microsoft Excel that you are using.

• Visual Basic For Applications

• Microsoft Excel 12.0 Object Library

• OLE Automation

- Microsoft Forms 2.0 Object Library

- Microsoft Office12.0 Object Library

- Microsoft Office 9.1 Object Library

- Microsoft XML, v4.0

- Microsoft Scripting Runtime

9. The version number on the Available References should either match or be greater than the numbers previously listed or shown in the following example:
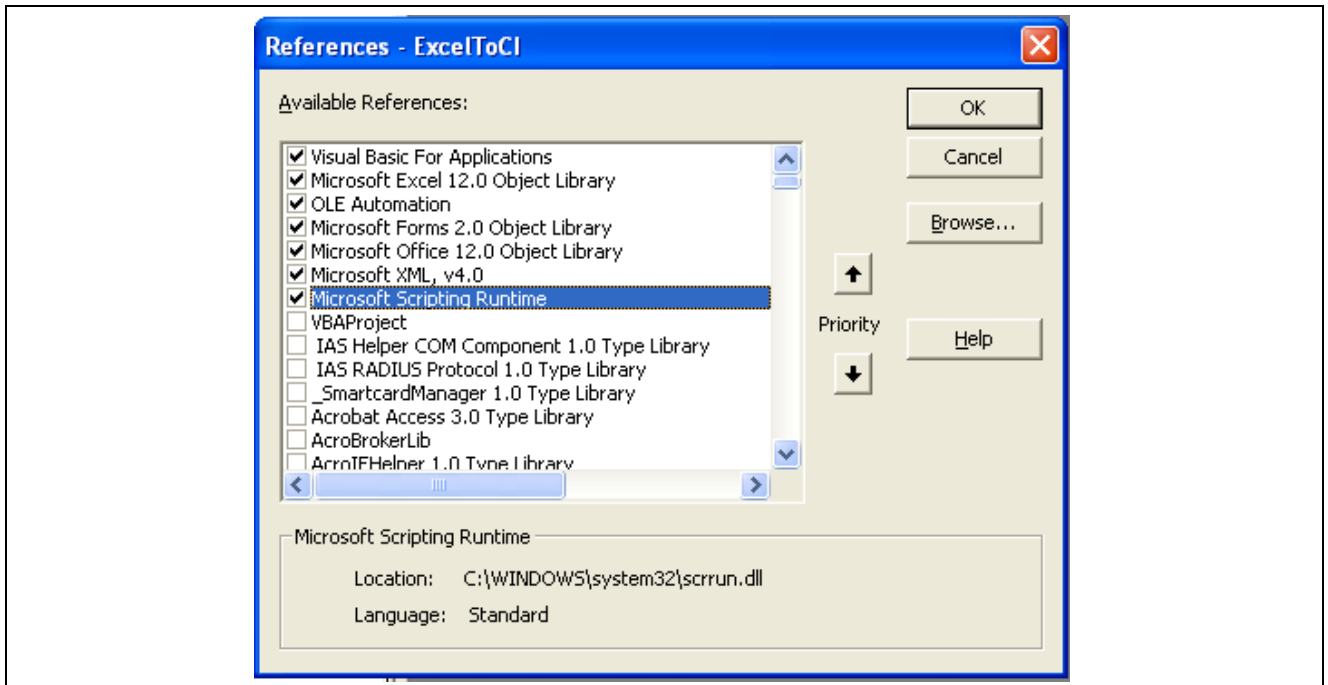
Microsoft Excel 2007: ExcelToCI - Available References dialog box
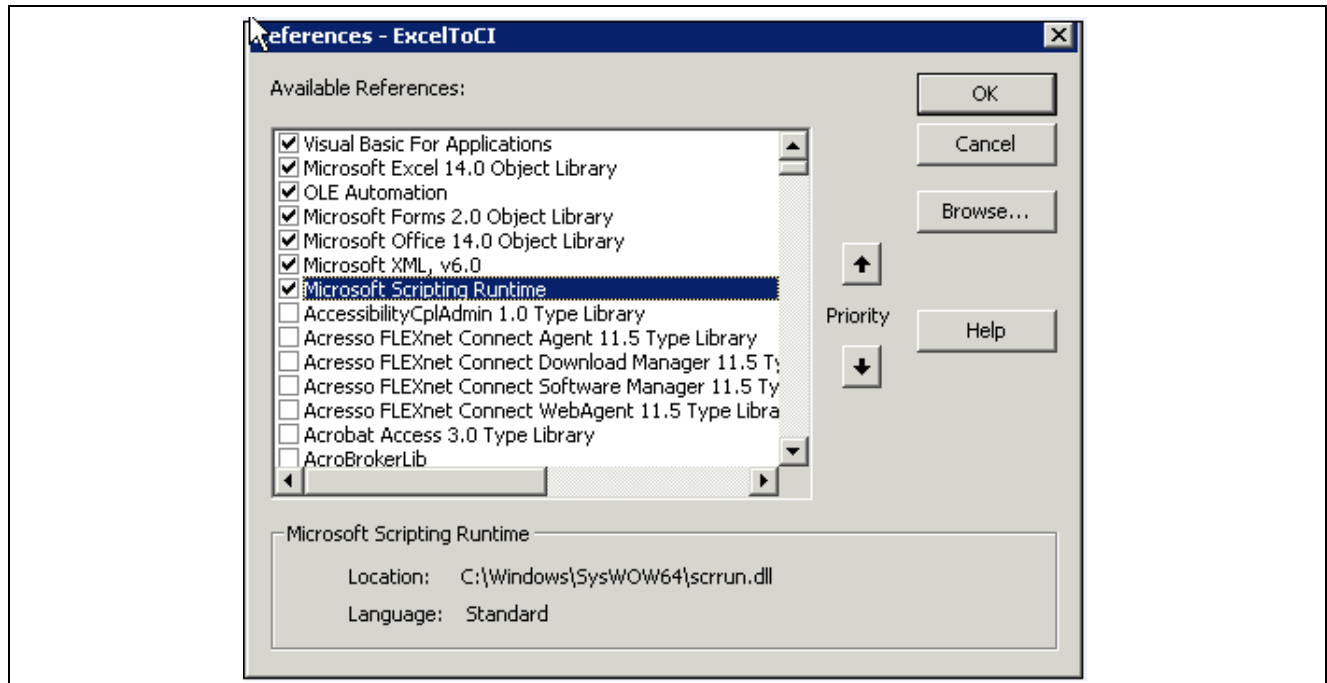
Microsoft Excel 2010: ExcelToCI - Available References dialog box

Task 1-14-2: Verifying the Installation of the PeopleSoft BP-Spreadsheet Add-In

To verify the installation of the spreadsheet add-in file:

1. Double-click the desktop *BP-SpreadsheetAdd-In* icon to open the Microsoft Excel workbook with the PeopleSoft Planning and Budgeting add-in program worksheets, and then click the Enable Macros button if it appears.

    Note. In *Microsoft Excel 2007*, this message may appear as a security warning at the top of the sheet. Click the Options button and select *Enable this content*, and then click OK, as shown in the following example:
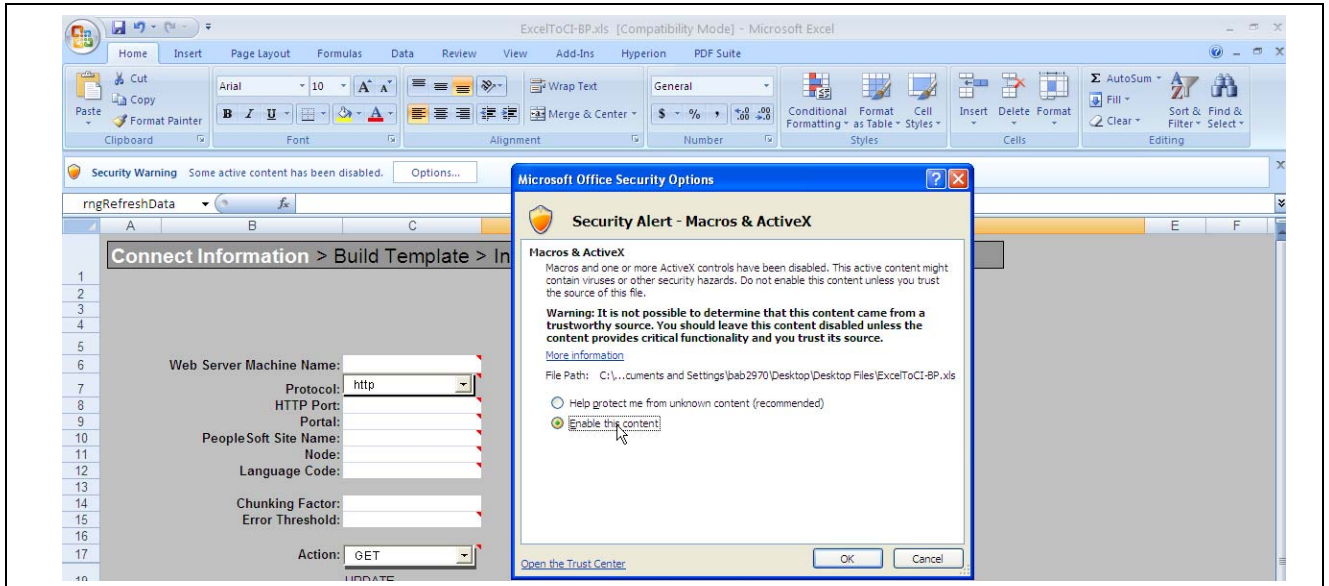
Microsoft Excel 2007 - Macros & ActiveX Security Alert

The workbook must have the worksheets as shown in this example and the list that follows:
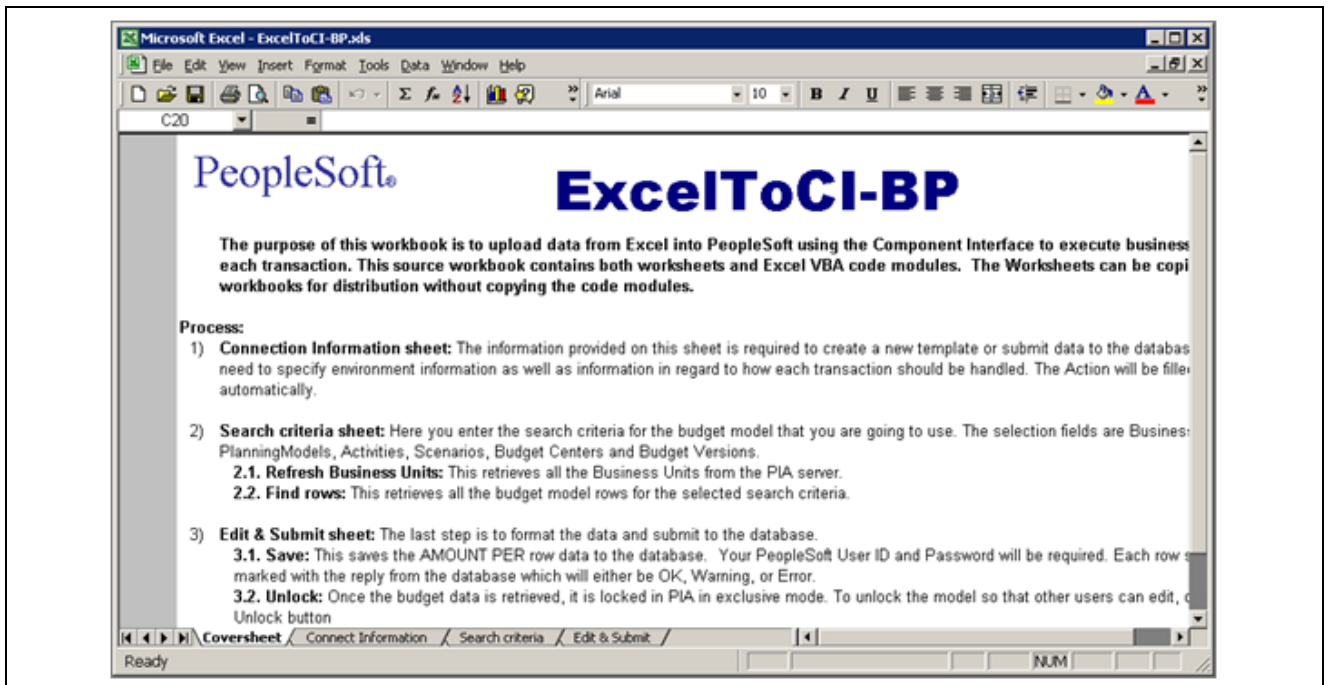
Microsoft Excel - ExcelToCI-BP.xls workbook containing the required worksheets

- Coversheet

- Connect Information

- Template

  The Template sheet is hidden. This is for internal use by the ExceltoCI program for metadata purposes. For the purpose of this document, the Template sheet displays in some of the images.

- Search Criteria

- Edit & Submit

2. Enter the following fields on the Connect Information sheet to point to a PeopleSoft Pure Internet Architecture server, as shown in the following example:
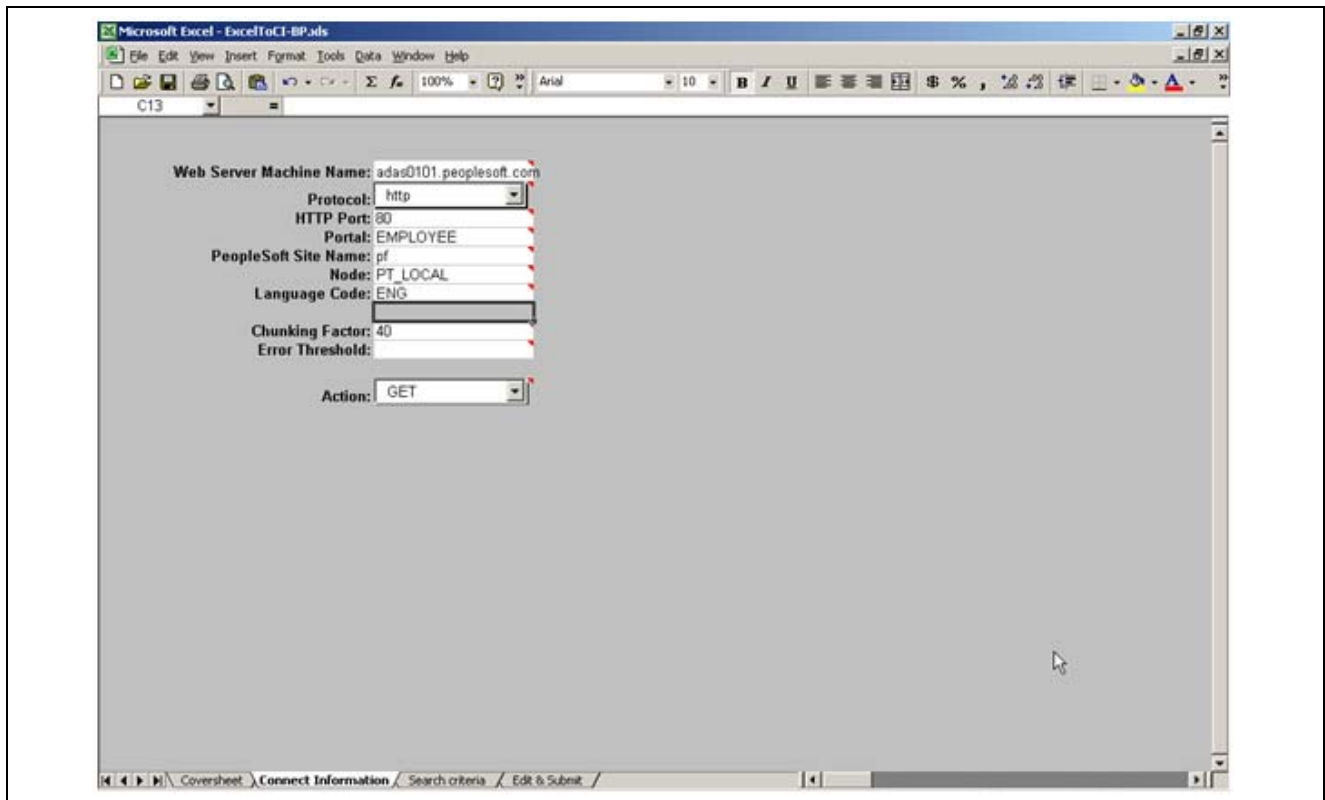
Microsoft Excel - ExcelToCI-BP.xls - Connect Information sheet displaying required fields

a. WebServer Machine Name — The name of the PeopleSoft Web server that you plan to use.

For example, in the previous connect sheet: *adas0101.peoplesoft.com*

b. Protocol — The protocol that is used to access the web server.

The default is *http*. The preferred protocol is *https*.

c. HTTP Port — The HTTP port number that the web server uses.

The default is *80*.

d. Portal — The name of the portal that you are using.

EMPLOYEE is a default portal that ships with PeopleSoft

e. PeopleSoft Site Name — The PeopleSoft site name that you defined during the installation of PeopleSoft Internet Architecture.

For example, in the previous Connect sheet: *pf*

Note. The PeopleSoft Site Name field is case sensitive.

f. Node — The PeopleSoft default local node name.

For example, in the previous Connect sheet: *PT_LOCAL*

To determine the PeopleSoft default local node, select PeopleTools, Integration Broker, Integration Setup, Nodes. Click Search to locate the node name with Default Local Node equal to Y.

g. Language Code — The language code for the language that you have installed.

h. Chunking Factor — The chunking factor that you desire.

Note. The chunking factor decides the commit frequency of the submission process. Selecting optimal value based on volume of submit data gives you better performance when compared to low value.

---

i. Error Threshold — The threshold at which you want to set for errors.

j. Action — The value for this field is supplied by the system when the component interface is retrieved from the database.

   You can change the supplied value by selecting it from the Action drop-down list box.

3. On the Search Criteria sheet, click the Login/Refresh button and enter the PeopleSoft user name and password in the Login dialog box.

Note. In *Microsoft Excel 2007*, the Spreadsheet Add-in buttons are available under the Custom Toolbars category on the Add-Ins tab.

For example, you can use *BP01/BP01* as the user name and password, as shown in the following example:
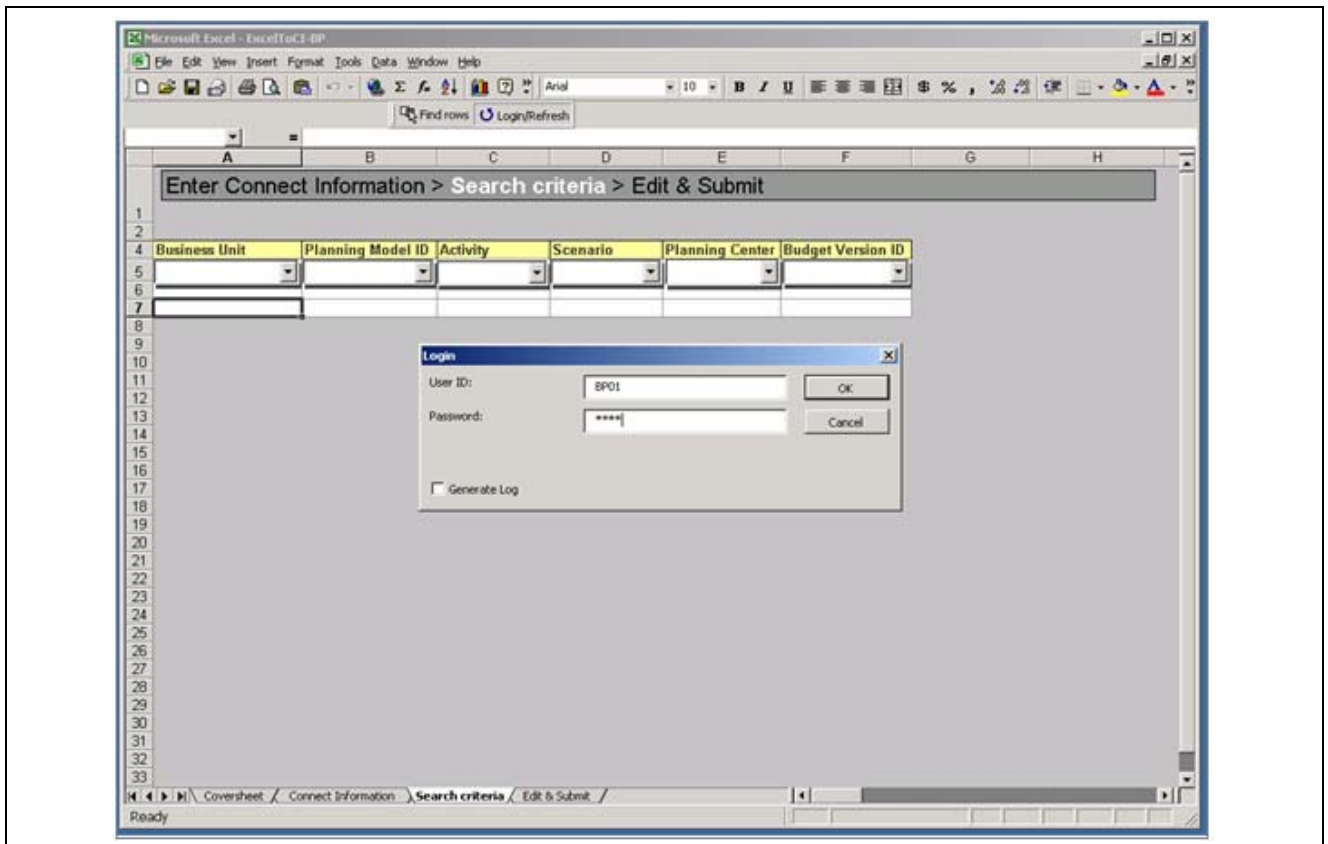
Microsoft Excel - ExcelToCI-BP.xls - Showing the Search Criteria sheet and Login dialog box

4. Click OK.

   The Business Unit list box displays a list of business units, as shown in the following example (your list of values may differ) :
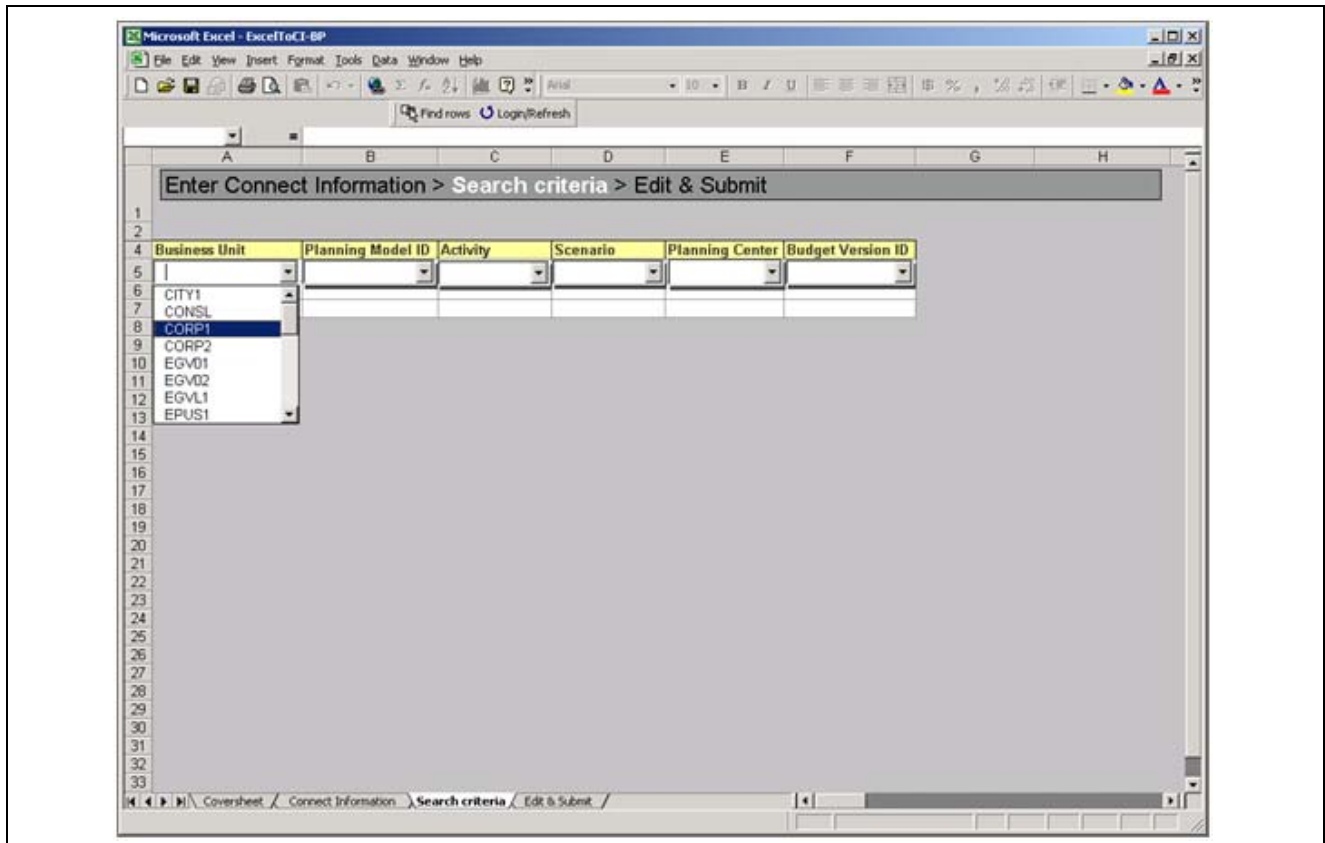
Microsoft Excel - ExcelToCI-BP.xls - Search Criteria sheet displaying the Business Unit combo box

Task 1-14-3: Reviewing Troubleshooting Tips for Microsoft Excel to PeopleSoft BP Add-In Installation

This section briefly discusses the most common errors and provides information on how to resolve them.

Problem: Message dialog box displays *Failed to communicate with server* on an action like Login/Refresh, as shown in the following example:
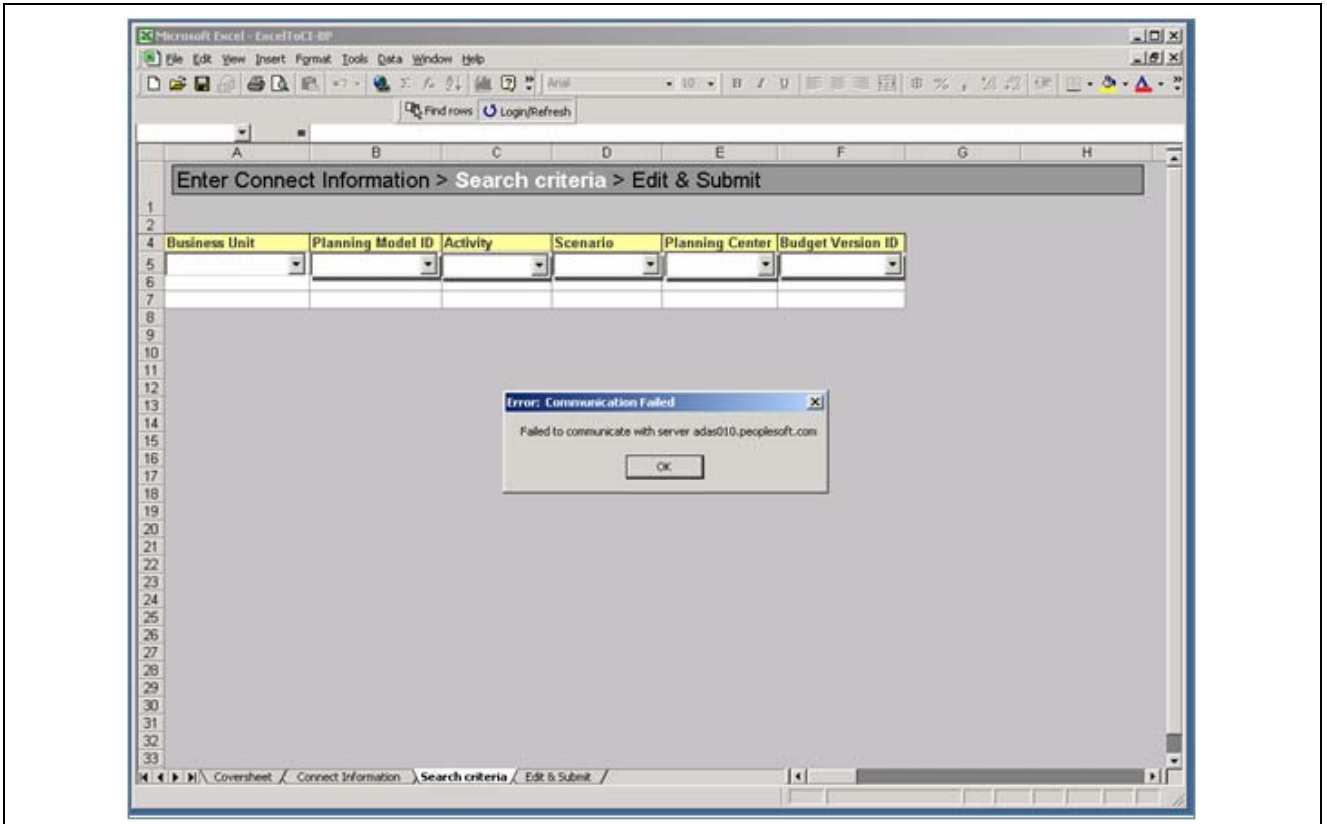
Microsoft Excel - ExcelToCI-BP - Showing error message "Failed to communicate with server"

Solution: Verify that the Web Server Machine Name field on the Connect sheet is correct, and ensure that the Web server is up and running.

Problem: Message dialog box displays *The response text is not valid XML* when the Login/Refresh button is clicked, as shown in the following example:
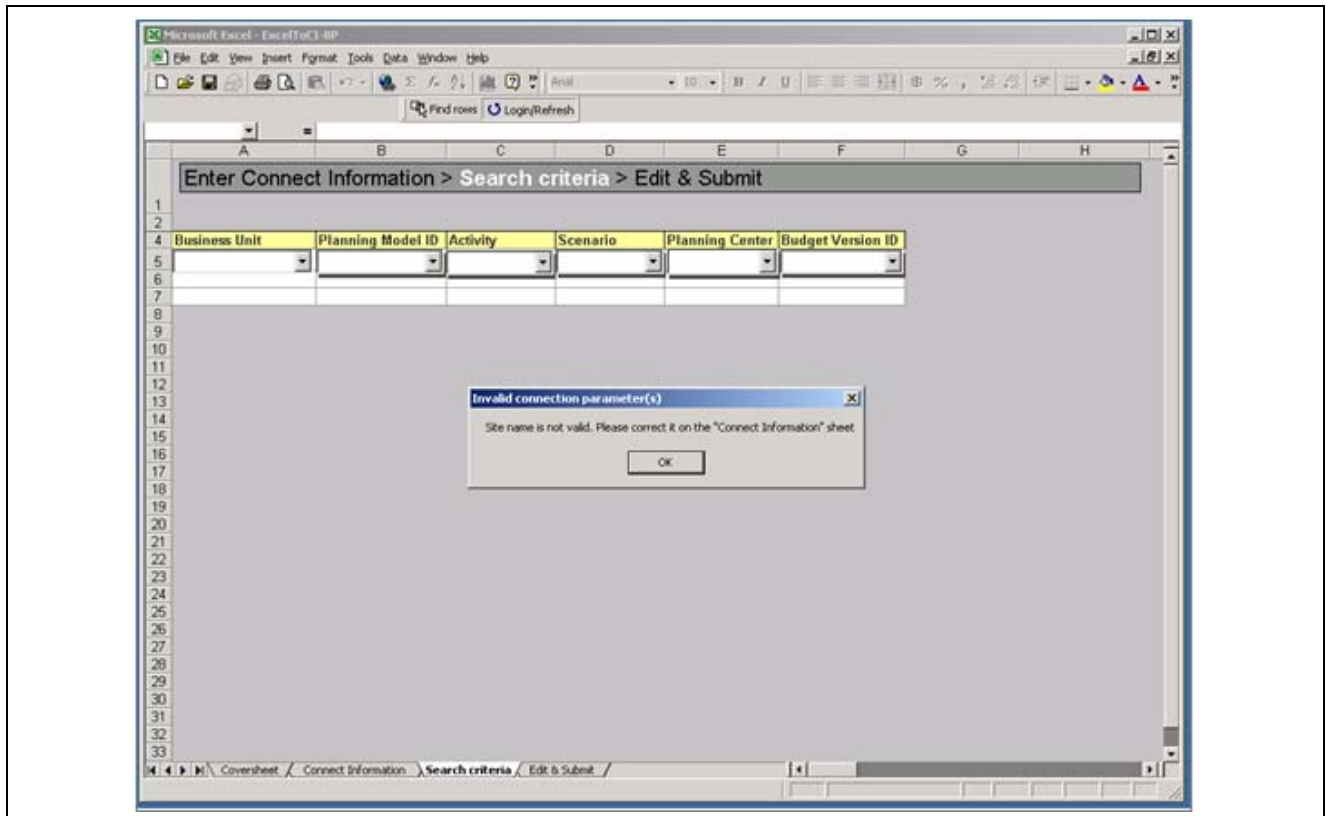
Microsoft Excel - ExcelToCI-BP - Showing error message "Site name is not valid"

Solution: Verify that the PeopleSoft Site Name field on the Connect sheet is correct.

Note. The site name is case sensitive, so make sure that the letters are in the proper case.

Problem: In the Search Criteria sheet, when the Login/Refresh button is clicked, a message dialog with the following text appears: *The macro "ExceltoCI-BP.xls'!refreshBusinessUnits' cannot be found*, as shown in the following example:
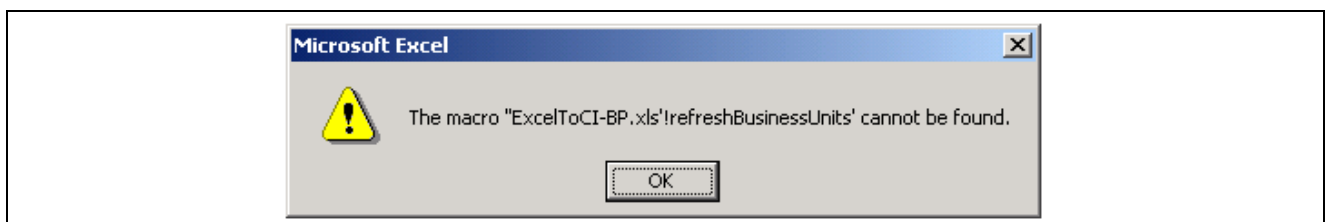
Microsoft Excel - ExcelToCI-BP - Showing error message "The macro Excel To CI-BP.xls! Refresh Business Units cannot be found"

Solution: This is due to the macro security level option set to *High* in Microsoft Excel. In Microsoft Excel, select Tools, Macro, Security to open a dialog box. In the Security Level tab, select either the Medium or Low option to correct this issue.

Problem: The workbook is in *Design Mode*. The design model toolbar displays, as shown in the following example:
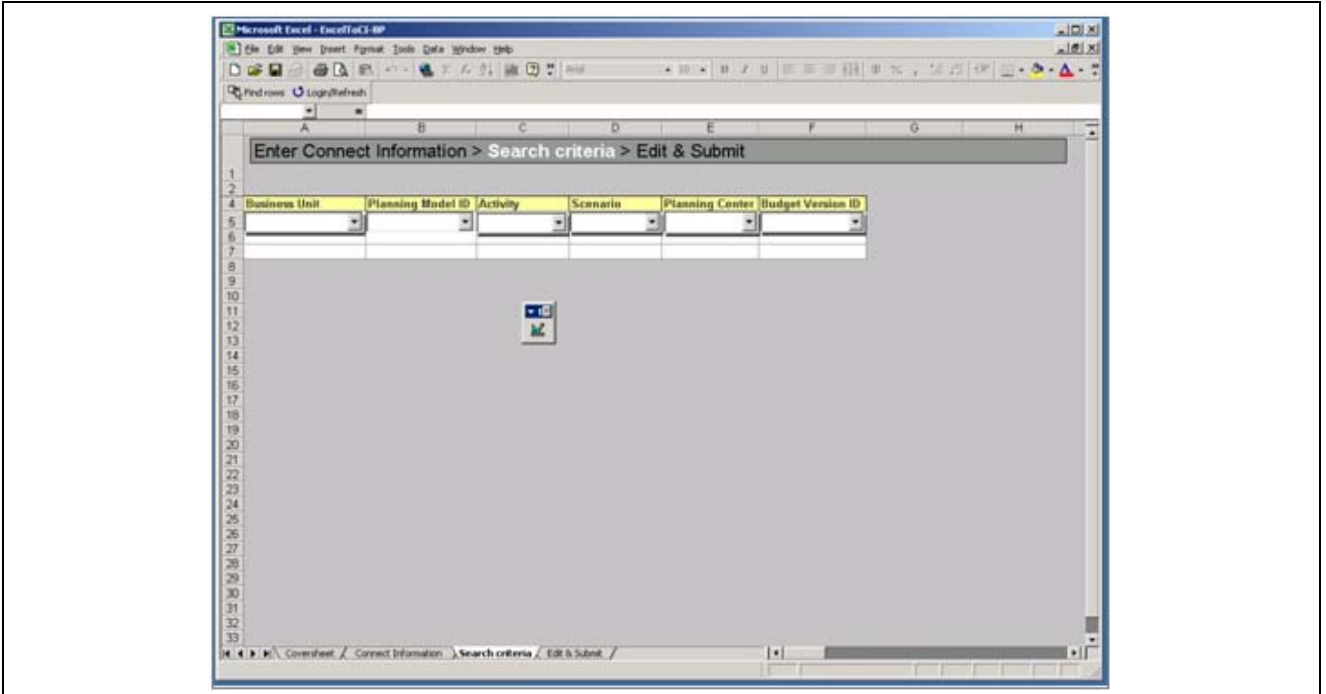
Microsoft Excel - ExcelToCI-BP - Showing the Search Criteria sheet displaying the Design Mode icon

Solution: In Microsoft Excel, select Tools, Customize and open the Customize dialog box. In the toolbars list box, clear the Exit Design Mode toolbar check box, as shown in the following example
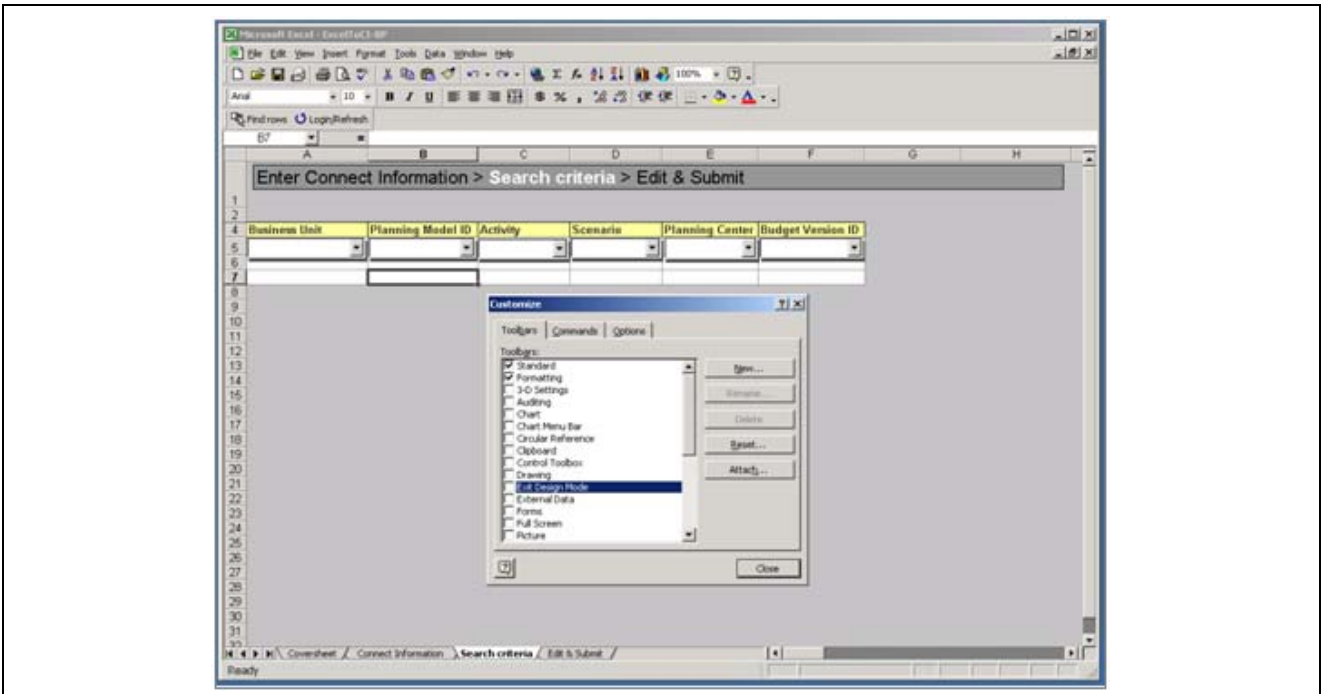
Microsoft Excel - ExcelToCI-BP - Search Criteria sheet and Toolbars dialog box

Then click Save, exit Microsoft Excel, and then re-open the workbook to verify your changes.

CHAPTER 2

Installing and Configuring IBM InfoSphere DataStage

This chapter discusses:

* Understanding Installing and Configuring IBM InfoSphere DataStage

* Prerequisites

* Outlining Tasks for Your IBM InfoSphere Information Server 8.5 Installation

* Selecting the Metadata Repository Location

* Installing the IBM InfoSphere Information Server

* Configuring the IBM InfoSphere Information Server

* Configuring Access to ODBC Data Sources

* Stopping and Starting the IBM InfoSphere DataStage Server

* Creating the IBM InfoSphere DataStage Projects

* Configuring Environmental Parameters

* Importing the .DSX Files

* Migrating Hashed Files From IBM Infosphere DataStage 8.1 to IBM Infosphere DataStage 8.5

Understanding Installing and Configuring IBM InfoSphere DataStage

Oracle's PeopleSoft Enterprise Performance Management (EPM) applications use the IBM InfoSphere DataStage tool. This chapter explains how to install and configure the 8.5 version of the IBM InfoSphere Information server and the IBM InfoSphere DataStage client. The installation for IBM InfoSphere DataStage client is common to all platforms. The IBM InfoSphere Information server installation differs according to the type of server that you are using (Microsoft Windows or UNIX).

Note. The install documentation that IBM delivers along with the IBM InfoSphere software provides a thorough discussion on how to install and configure the IBM InfoSphere Information Server. For further information, refer to the DataStage installation documentation provided with the IBM InfoSphere DataStage product. Additionally, you can refer *InstallationGuide.i46iepic.pdf* that is included in your download for details about the installation.

Prerequisites

Oracle recommends that you read the following PeopleSoft EPM and IBM InfoSphere Information server documentation before you begin installing and configuring the IBM InfoSphere DataStage environment.

- Accessing the PeopleSoft EPM Warehouse 9.1 documentation.

    You can access the PeopleSoft EPM Warehouse documentation from My Oracle Support.

    See the following PeopleSoft EPM Warehouse PeopleSoft Online Help (PeopleBooks). Each book has its own *Understanding EPM Warehouses* section that covers the Multidimensional Warehouse and other components that comprise an EPM Warehouse. You can refer to these PeopleSoft Online Help (PeopleBooks) for more information on loading data into the Multidimensional Warehouse and the ETL implementation steps:

    - *PeopleSoft EPM: Campus Solutions Warehouse*
    - *PeopleSoft EPM: Customer Relationship Management Warehouse*
    - *PeopleSoft EPM: Financial Management Solutions Warehouse*
    - *PeopleSoft EPM: Financials Warehouse for Public Sector and Higher Education*
    - *PeopleSoft EPM: Fusion Campus Solutions Intelligence for PeopleSoft*
    - *PeopleSoft EPM: Human Capital Management Warehouse*
    - *PeopleSoft EPM: Supply Chain Management Warehouse*

- Accessing the IBM InfoSphere Information Server documentation.

    You can access the IBM InfoSphere Information Server online documentation as follows:

    From your Start menu, select Programs, IBM InfoSphere Information Server, Documentation. The page that appears lists the available documents. Review these documents before you begin the configuration:

    - *IBM Information Server: Planning, Installation, and Configuration Guide*
    - *IBM Information Server: Administration Guide*
    - *IBM InfoSphere DataStage and QualityStage: Administration — Administrator Client Guide*
    - *IBM InfoSphere DataStage and QualityStage: Administration — Director Client Guide*
    - *IBM InfoSphere DataStage and QualityStage: Development — Designer Client Guide*

Task 2-1: Outlining Tasks for Your IBM InfoSphere Information Server 8.5 Installation

This section discusses:

- Reviewing System Requirements
- Reviewing and Selecting an Installation Topology
- Reviewing Project Naming Conventions
- Modifying Kernel Parameters and User Limits for Linux and UNIX
- Setting Up Users for the IBM InfoSphere Installation

- Setting Up Users and Registries for the IBM InfoSphere Installation

- Selecting the IBM WebSphere Application Server

Before you install the IBM InfoSphere Information Server, you must select an installation topology and location, review your information integration and hardware needs, and complete the preparation activities.

Task 2-1-1: Reviewing System Requirements

Before you begin, ensure that all of your computers meet the hardware and software requirements for the product modules and components that you want to install. For more details, refer to the hardware and software requirements documentation for both the PeopleSoft EPM application and the IBM InfoSphere Information Server application.

See *PeopleSoft Enterprise Performance Management 9.1 Revision 2 Hardware and Software Requirements*

See *IBM Information Server 8.5 Planning, Installation, and Configuration Guide (InstallationGuide.i46iepic.pdf)*

Task 2-1-2: Reviewing and Selecting an Installation Topology

This section discusses:

- Understanding Tiers and Components in the IBM InfoSphere Information Server Topology

- Reviewing Topology Types

- Reviewing a Topology and Tier Mapping Example

To select a topology, determine your capacity and performance needs by considering factors such as processing and data volumes, the location of data sources, network throughput, and network latency. Depending on how you plan to use IBM InfoSphere Information Server and its product modules, you can determine where you want to install the product suite.

Understanding Tiers and Components in the IBM InfoSphere Information Server Topology

The IBM InfoSphere Information Server is installed and configured in logical tiers: client, engine, metadata repository, and services.

A tier is a logical grouping of software that you map to the physical hardware. In addition to the main product modules, you install the product components in each tier as needed:

- *Client*—The product module clients that are not Web-based and that are used for development and administration in IBM InfoSphere Information Server.

- *Engine*—The runtime engine that runs jobs and other tasks for product modules that require the engine.

- *Metadata Repository*—The database that stores the shared metadata, data and configuration for the IBM InfoSphere Information Server and the product modules.

- *Services*—The common and product-specific services for the IBM InfoSphere Information Server along with the IBM WebSphere Server.

These tiers work together to provide services, job execution, metadata and other storage, as shown in the following diagram:
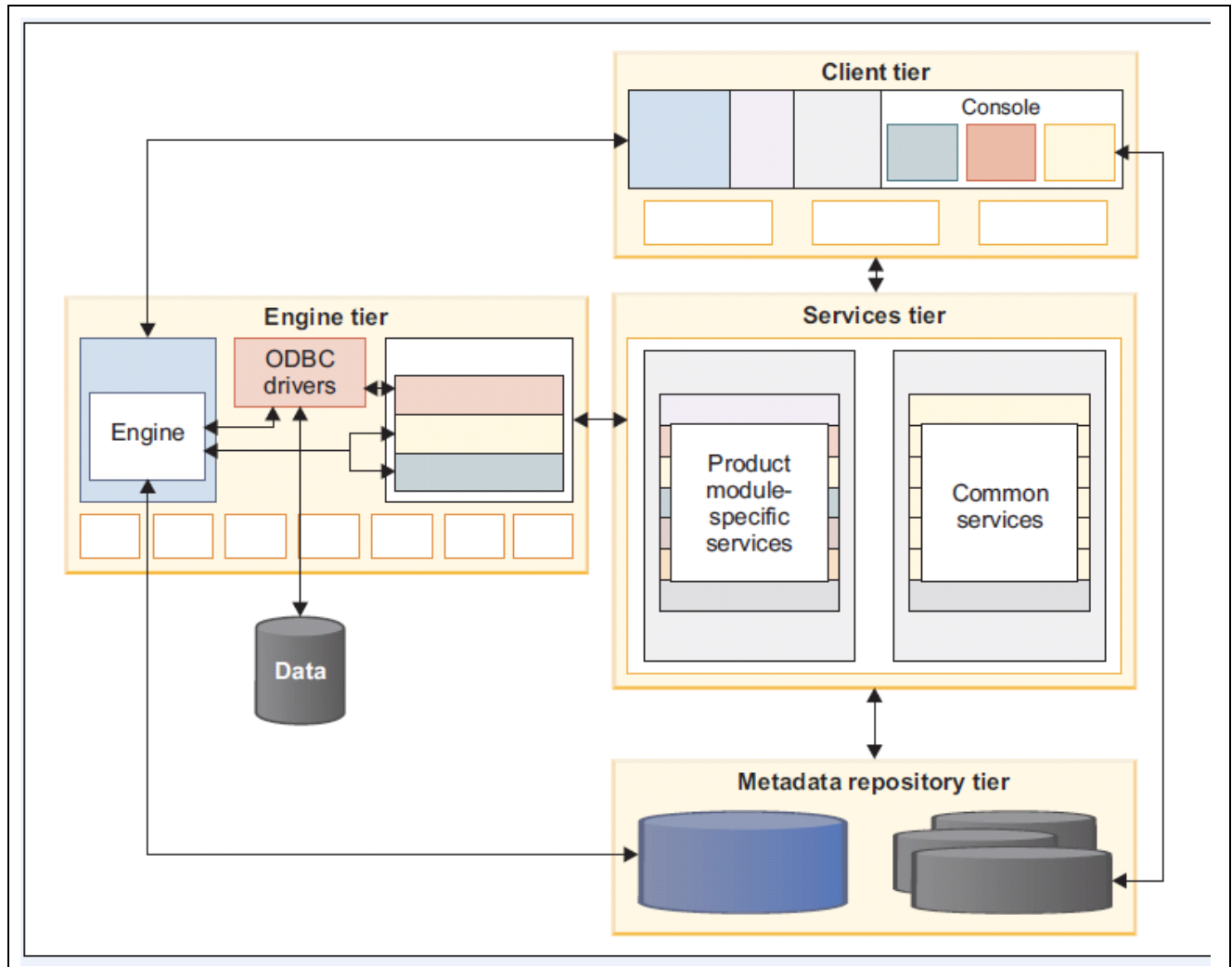
Tier Relationships diagram

For more information about tier relationships, see the *IBM Information Server 8.5 Planning, Installation, and Configuration Guide*, InstallationGuide.i46iepic.pdf, that is included in your download.

Reviewing Topology Types

You install the IBM InfoSphere Information Server and its product modules in a topology to fit your information integration and hardware needs.

Use the same topology for your test and production environments to minimize issues when a job is deployed into production. This way, you can test your application in an environment that mirrors the production environment.

This table describes the types of topologies by the number of computers for your installation, where additional clients can be on additional computers:

Hardware in the Topology	Tier Mapping to Hardware	Notes
Single computer	Engine,metadata repository, services and clients, all on single computer.	In this topology, the engine tier, metadata repository tier, services tier, and client tier are all installed on a single computer. This topology is specific to Microsoft Windows configurations.
Client/server	Computer 1: engine, metadata repository and services. Computer 2 or more: one or more computers as clients.	In this topology, the engine tier, metadata repository tier, and services tier are all installed on a single computer. The client tier is installed on separate computers.
Dedicated engine tier (Recommended)	Computer 1: engine. Computer 2: metadata repository and services. Computer 3 or more: one or more computers as clients.	In this topology, the services tier and metadata repository tier are installed on a computer. The engine tier is installed on another computer. The client tier is installed on separate computers.
Dedicated computer for each tier	Computer 1: engine. Computer 2: metadata repository. Computer 3: services. Computer 4 or more: one or more computers as clients.	You can host each tier on a separate computer.

Reviewing a Topology and Tier Mapping Example

To set up your installation, first plan how you want to map the tiers to your hardware. As an example, consider the following three-logical-tier mapping to three computers. The diagram that follows shows the installation of the tiers.

Computer 1: Client tier.

Computer 2: Metadata Repository tier, Services tier (including IBM WebSphere Application Server), and the analysis database for IBM InfoSphere Information Analyzer.

Computer 3: Engine tier and the IBM InfoSphere QualityStage match database.

The following diagram of topology architecture shows the installation of tiers for three-logical-tier mapping to three computers:
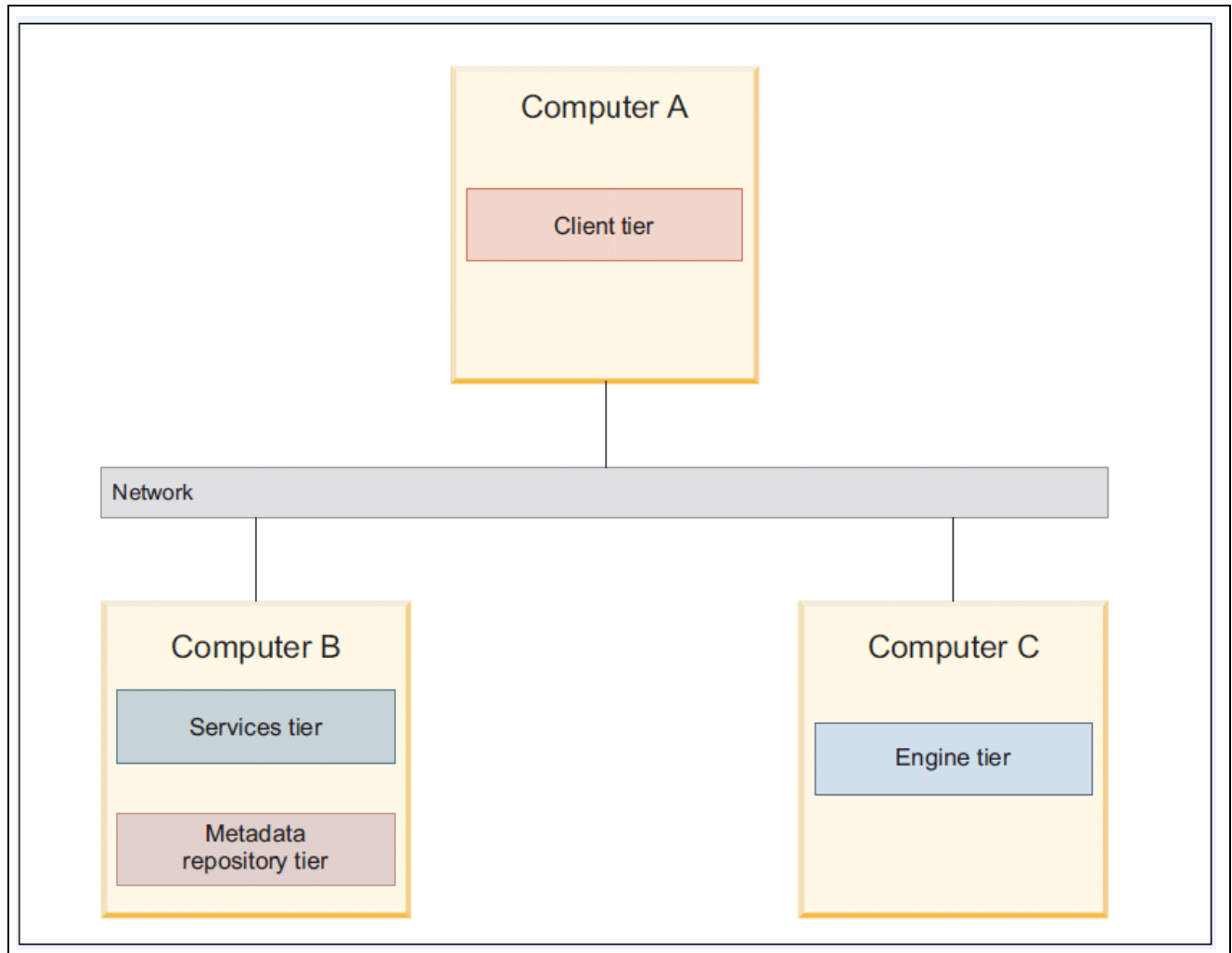
Topology Architecture - Showing installation of tiers for three-logical-tier mapping to three computers

Task 2-1-3: Reviewing Project Naming Conventions

Before installation, you must prepare your disk, volume group, and file system resources. For more information, see the *IBM Information Server 8.5 Planning, Installation, and Configuration Guide*, InstallationGuide.i46iepic.pdf, that is included in your download.

As you plan for your installation of IBM InfoSphere Information Server, document how your projects must be named. IBM InfoSphere DataStage, IBM InfoSphere QualityStage, and IBM InfoSphere Information Analyzer store jobs, analysis, and logs in these projects.

Choose the name of one IBM InfoSphere DataStage project during the initial installation. The name of a project is limited to a maximum of 40 characters. The project name can contain alphanumeric characters, including underscores (_). Project names cannot use these reserved letter combinations:

- ds
- DS
- uv
- UV

Task 2-1-4: Modifying Kernel Parameters and User Limits for Linux and UNIX

This section discusses:

- Understanding Modifying Kernel Parameters and User Limits for Linux and UNIX

- Reviewing DB2 Kernel Parameters for the Metadata Repository Tier

- Reviewing Kernel Parameters for the Application Server

- Reviewing Minimum IBM AIX Kernel Parameters and User Limits

- Reviewing Minimum HP-UX Kernel Parameters and User Limits

- Reviewing Minimum Linux Kernel Parameters and User Limits

- Reviewing Minimum Sun Solaris Kernel Parameters and User Limits

Understanding Modifying Kernel Parameters and User Limits for Linux and UNIX

Before you start the installation program, you need to modify kernel parameters and user limits, then restart the computer. The kernel parameter and user limit requirements are minimum requirements for the IBM InfoSphere Information Server.

The optimal value for each parameter may be higher, depending on the topology of your installation and the operational data load. Additional changes may be required. If you need to provide more than one value for your configuration, use the largest minimum value. Only a trained system administrator should make the changes.

Before you modify any parameters or user limits, be sure to make a backup copy. After modification, restart the computer, and then install the IBM InfoSphere Information Server.

Reviewing DB2 Kernel Parameters for the Metadata Repository Tier

The minimum metadata repository kernel parameter requirements apply only to IBM DB2 database installations. Ensure that your computer meets the kernel parameter requirements for DB2 before you install IBM DB2 as part of the IBM InfoSphere Information Server. If you use a different database system for the metadata repository, consult the product documentation for that database system to find information about kernel parameter requirements.

For more information, see the *IBM Information Server 8.5 Planning, Installation, and Configuration Guide*, InstallationGuide.i46iepic.pdf, that is included in your download.

When the DB2 kernel requirements are different from the IBM Information Server kernel parameter requirements, use the largest minimum value.

The following table contains the minimum kernel parameters and user limits for the metadata repository tier on DB2 for Linux:

Parameter	Metadata Repository Tier
MSGMAX	65535
MSGMNB	65535
MSGMNI	1024
RANDOMIZE_VA_SPACE	0
SEMMNI	1024
SEMMNS	256000
SEMMSL	250

Parameter	Metadata Repository Tier
SEMOPM	32
SHMALL	8388608 or 90% of physical memory (whichever value is greater)
SHMMAX	32-bit: 268435456 64-bit: 1073741824 Set this value to be equal to the amount of physical memory on your computer.
SHMMNI	4096

Reviewing Kernel Parameters for the Application Server

You can find system tuning information for the IBM WebSphere Application Server in the documentation for that product. See the *IBM WebSphere Application Server 6.1 information center: Preparing the operating system* for product installation.

Reviewing Minimum IBM AIX Kernel Parameters and User Limits

The following table contains the minimum kernel parameters and user limits for the installation on IBM AIX:

Parameter	Engine Tier	Services Tier
SHMMAX	536870912	536870912
SHMMNI	2000	2000
SHMSEG	200	200
MAXUPROC	200	1000 or unlimited
NOFILES	1000	10240

Reviewing Minimum HP-UX Kernel Parameters and User Limits

The following table contains the minimum kernel parameters and user limits for the installation for HP-UX:

Parameter	Engine Tier	Services Tier
MAXFILES	No requirement	8000
MSGMAP	32768	32768
MSGMAX	32768	65535
MSGMNB	32768	65535 (single profile) 131070 (more than one profile)
MSGMNI	No requirement	50
MSGSEG	7168	32676
MSGTQL	No requirement	2046
NFILE	No requirement	58145
NFLOCKS	No requirement	3000
NPROC	No requirement	4116
SEMMNI	No requirement	2048
SEMMNS	No requirement	16384
SEMMNU	No requirement	1024

Parameter	Engine Tier	Services Tier
SHMMAX	No requirement	307200000
SHMMNI	2000	2000
SHMSEG	200	1024
MAXUPRC	200	1000 or unlimited
NOFILES	1000	10240

Reviewing Minimum Linux Kernel Parameters and User Limits

The following table contains the minimum kernel parameters and user limits for the installation on Linux:

Parameter	Engine Tier	Services Tier
MSGMAX	8192	No requirement
MSGMNB	16384	No requirement
MSGMNI	No requirement	No requirement
SEMMNI	1024	No requirement
SEMMNS	128000	No requirement
SEMMSL	250	No requirement
SEMOPM	32	No requirement
SHMALL	No requirement	2511724800
SHMMAX	307200000	2511724800
SHMMNI	2000	No requirement
SHMSEG	200	No requirement
nproc	200	1000 or unlimited
nofile	1000	10240

Reviewing Minimum Sun Solaris Kernel Parameters and User Limits

If you are on Sun Solaris 10, you need to modify the */etc/project* file, not the */etc/system* file.

```
system:0::::
user.root:1::::
noproject:2::::
default:3:::::project.max-msg-ids=(priv,3584,deny);project.max-sem-ids=⇒
(priv,4096,deny);project.max-shm-ids=(priv,4096,deny);project.max-shm-memory=⇒
(priv,7682162688,deny)
group.staff:10::::
db2fenc1:100::db2fenc1::
db2inst1:101::db2inst1::
dasusr1:102::dasusr1::
dsadm:103::dsadm::
```

In the previous example, each entry must be specified on the same line. The character is used to represent the continuation of the default parameter line.

The following table contains the minimum kernel parameters and user limits for the installation:

Parameter	Engine Tier	Services Tier
MSGMAP	No requirement	1026
MSGMAX	8192	65535
MSGMNB	16384	No requirement
MSGMNI	1024	No requirement
SEMAEM	No requirement	16384
SEMMAP	No requirement	1026
SEMMNI	No requirement	1024
SEMMNS	128000	16384
SEMMNU	No requirement	2048
SEMMSL	1024	100
SEMOPM	32	100
SEMUME	No requirement	256
SEMVMX	No requirement	No requirement
SHMMAX	307200000	4294967295
SHMMIN	No requirement	No requirement
SHMMNI	2000	1024
SHMSEG	200	1024
MAXUPRC	200	1000 or unlimited
NOFILES	1000	10240
rlim_fd_cur	No requirement	Greater than 8193
rlim_fd_max	No requirement Greater than 8193	Greater than 8193

Task 2-1-5: Setting Up Users for the IBM InfoSphere Installation

This section discusses:

• Understanding Setting Up Users for the IBM InfoSphere Installation

• Reviewing User IDs and Password Requirements

• Reviewing Administrator Accounts

Understanding Setting Up Users for the IBM InfoSphere Installation

Before you install the IBM InfoSphere Information Server, you must set up the users for your installation.

Create the accounts manually before the installation. This ensures that operating system policies, such as requiring a password change at the first login, do not interfere with the installation program use of the accounts. You can activate each account by logging in. Some operating systems are set up to force a password change during the first login. Therefore, a manual login is required to activate the accounts appropriately.

Reviewing User IDs and Password Requirements

Certain characters cannot be used with user IDs or passwords. The following are not permitted:

$ (dollar sign)

! (exclamation point)

% (percent sign)

: (colon)

(blank space)

In addition to alphanumeric characters, the following characters are also permitted:

_ (underscore)

- (hyphen)

, (comma)

\ (backslash)

= (equal sign)

. (period)

$ (dollar sign)

Although the dollar sign is allowed here, it is not recommended if you want your local OS user ID and internal registry user ID to match.

Reviewing Administrator Accounts

The IBM InfoSphere Information Server install program creates an internal registry within the IBM InfoSphere Information Server. This registry stores user IDs and passwords within the IBM InfoSphere Information Server for authentication. The installation program does *not* create these users at the operating system level; it creates the accounts in the internal registry.

The following table lists the account description and corresponding default user name:

Account Description	Default User Name
Administrator for IBM WebSphere Application Server	wasadmin
Administrator for IBM InfoSphere Information Server	isadmin
Create a single account to administer the IBM InfoSphere Information Server and IBM WebSphere Application Server. Create two accounts if you want a separate administrator for each program.	Not applicable.

When you create the user accounts, record the name and password for each user. You need to specify each name and password when the installation program prompts you for that information.

Task 2-1-6: Setting Up Users and Registries for the IBM InfoSphere Installation

To set up users and registries for the installation:

1. On the operating systems where you install the IBM InfoSphere Information Server, ensure that the user who installs the IBM InfoSphere Information Server is logged in using the following accounts:

   • For UNIX and Linux, the root user account.

- For Microsoft Windows, a user account in the local Administrators group.

   This account must be one of the following:

   A local account that is directly assigned to the Microsoft Windows local Administrators group.

   A domain account that is directly assigned to the Microsoft Windows local Administrators group.

2. On the operating systems where you install the engine, the metadata repository, and the services, create these additional accounts and record the passwords, as listed in the following table:

Account Description	Default User Name	Primary Group	Secondary Group	Location of Account	Notes
DB2 administration server	Linux, UNIX: dasusr1 MS Windows: db2admin	Linux, UNIX: db2admns and administrators	None	Metadata Repository tier	DB2 database only, operating system account
DB2 instance owner	Linux, UNIX: db2inst1 MS Windows: db2admin	Linux, UNIX: db2iadm1	Linux, UNIX: dasadm1 MS Windows: None	Metadata repository tier	DB2 database only, operating system account
BB2 fenced user or Linux and UNIX	db2fenc1	db2fadm1	None	Metadata Repository tier	DB2 database only, operating system account
Owner of the metadata repository1	xmeta	xmeta	None	Metadata Repos itory tier	DB2 database only, operating system account. When you use the DB2 database for the repository, the DB2 database uses the authentication for the operating system for connection requests.

Account Description	Default User Name	Primary Group	Secondary Group	Location of Account	Notes
Administrator for the IBM InfoSphere Information Server engine.	dsadm	dstage	You customize this group to apply to your security model.	Engine tier	This user performs administrative tasks, such as adding new projects and defining their properties. Instead of running jobs under this account, create a user with the developer role.
IBM InfoSphere Information Analyzer: owner of the analysis database1	iauser	iaurser	None	Engine tier or Metadata Repository tier	DB2 database only, operating system account. DB2 database uses the authentication for the operating system.

Note. Be sure to record the passwords during your installation, as they are used later to verify each account.

On UNIX and Linux the DB2 installation program requires root access, but also must have write permissions for several file systems, such as /var and /usr/local/bin. This requirement may not be met when the directories are mounted from network file systems such as AFS.

3. Log in to each account to confirm that it functions properly.

Example UNIX commands for creating user accounts and groups:

```
groupadd db2iadm1
groupadd db2fadm1
groupadd dasadm1
groupadd dstage
useradd -gdb2fadm1 -pPa55w0rd -m -d /home/db2fenc1 db2fenc1
useradd -gdb2iadm1 -Gdasadm1 -pPa55w0rd -m -d /home/db2inst1 db2inst1
useradd -gdasadm1 -pPa55w0rd -m -d /home/dasusr1 dasusr1
useradd -gdstage -pPa55w0rd -m -d /home/dsadm dsadm
useradd -pPa55w0rd -m -d /home/iauser iauser
useradd -pPa55w0rd -m -d /home/xmeta xmeta
```

These tasks require additional configuration for users and registries:

- During the installation, use the user names and passwords from this task.

- After the installation, you may optionally change a local operating system user registry or configure an LDAP-compliant user registry.

Task 2-1-7: Selecting the IBM WebSphere Application Server

In the services tier, you can install the IBM WebSphere Application Server (the application server) as part of the IBM InfoSphere Information Server installation, or you can use an existing installation of the application server. The easier method is to install a new application server during the IBM InfoSphere Information Server installation. Depending on your usage of the IBM InfoSphere Information Server and whether your operating system supports both versions, either the 32-bit or the 64-bit version of the application server may be more appropriate as you plan for your longer term performance and number of users.

For 64-bit Linux: Install the 64-bit version of the application server before you install the IBM InfoSphere Information Server.

For other 64-bit UNIX platforms: You can choose to install the 32-bit or 64-bit IBM WebSphere Application Server. For installation instructions, see the product documentation for the application server.

After you install the 64-bit application server, verify that you have the correct versions of the application server and the Java SDK using these commands:

```
/opt/IBM/WebSphere/AppServer64/bin/versionInfo.sh
/opt/IBM/WebSphere/AppServer64/java/bin/java -fullversion
```

New Installations:

If you install the application server as part of the IBM InfoSphere Information Server installation, the installation program creates a server profile that is named *default* and an application server instance that is named *server1*. This application server is licensed for use only with the IBM InfoSphere Information Server.

Existing Installations:

To use an existing application server, you must use the stand-alone version of the IBM WebSphere Application Server (*not* the IBM WebSphere Network Deployment or IBM WebSphere Extended Deployment). The application server must be on the same computer where you install the services tier. You must create a new application server profile before you start the IBM InfoSphere Information Server installation program. That profile must contain a server that is named *server1* with the security disabled.

For information about creating a profile, see the IBM WebSphere Application Server information center at the following url: *http://publib.boulder.ibm.com/infocenter/wasinfo/v6r1/index.jsp?topic= /com.ibm.websphere.base.doc/info/welcome_base.html*

Task 2-2: Selecting the Metadata Repository Location

This section discusses:

- Understanding Selecting the Metadata Repository Location
- Prerequisites
- Using a Local DB2 for Linux, UNIX and Microsoft Windows
- Verifying on an Existing Local DB2 for Linux, UNIX and Microsoft Windows
- Creating the Repository Manually for an Oracle, Microsoft SQL, or DB2 Database
- Reviewing Install Options for DB2 on Linux, UNIX and Microsoft Windows

- Creating the DB2 Manually for the Repository (Linux, UNIX, Microsoft Windows)

- Creating a DB2 for z/OS Database for the Metadata Repository

- Creating an Oracle Tablespace for the Metadata Repository

- Creating a Microsoft SQL Server Database for the Metadata Repository

Understanding Selecting the Metadata Repository Location

Before installing the IBM InfoSphere Information Server, you must decide the locations for your metadata repository.

You create the metadata repository using one of the following methods:

- *New IBM DB2 database and new repository:* The installation program installs a new IBM DB2 database system and creates a new metadata repository.

- *Existing local DB2 database and repository created within:*The installation program refers to an existing local DB2 database system and creates the metadata repository in it.

- *Existing database manually created repository:* The installation program refers to an existing database system and uses a manually created metadata repository.

Also, the computer where you install the services tier must be able to access the metadata repository. By default, the database name of the metadata repository is *xmeta*. If you install the IBM InfoSphere Information Analyzer, the engine and client tiers must be able to access the analysis database. By default, the database name of the analysis database is *iadb*.

Prerequisites

Before you begin, ensure that you meet the following requirements:

- Before you install the IBM InfoSphere Information Server, you must create the database for the metadata repository and for any users that are needed.

- You must establish database connectivity from the services tier to the database for the metadata repository.

Using a Local DB2 for Linux, UNIX and Microsoft Windows

You must use the IBM InfoSphere Information Server installation program to install the metadata repository tier. When you install this tier, you install the DB2 database system (or reuse an existing local DB2 installation), create the database for the metadata repository, and create the required users (if needed).

Verifying on an Existing Local DB2 for Linux, UNIX and Microsoft Windows

If you choose to use an existing DB2 installation, it must not be set up as a partitioned database environment. This type of environment and the fast communications manager (FCM) are not supported for use with the IBM InfoSphere Information Server.

For Linux and UNIX: To reuse an existing DB2 installation on Linux and UNIX, you must use DB2 Fault Monitoring components that require the entry of the path to the fault monitor (db2fmcd) in the */etc/inittab* file. The `db2fmcd` command must point to the actual executable location.

For example:

```
fmc:234:respawn:/u1/IBM/db2/V9/bin/db2fmcd #DB2 Fault Monitor Coordinator
```

Creating the Repository Manually for an Oracle, Microsoft SQL, or DB2 Database

You can manually create the database for the metadata repository and the required users for these databases. During the installation process, do *not* select the metadata repository tier. Instead, the installation program prompts you for the database connection information.

For z/OS: If you are installing the IBM InfoSphere Information Server on a supported Linux operating system on System z, you can use a DB2 for z/OS database as the metadata repository.

Task 2-2-1: Reviewing Install Options for DB2 on Linux, UNIX and Microsoft Windows

If you choose to use the IBM DB2 server for Linux, UNIX and Microsoft Windows to hold your metadata repository or analysis database, you can choose to use 9.7, 9.5 or 9.1.

If you install the DB2 database system, you can install 9.1, 9.5 or 9.7. The IBM Information Server installation program can install DB2 9.7 when the operating system supports this version. On operating systems where DB2 9.7 is not supported, you must install DB2 9.5 or DB2 9.1 separately, before you install the IBM Information Server. You may also choose to install DB2 9.5 or DB2 9.1 if your organization standardized on this version.

If you already have an installation of DB2 9.7, 9.5 or 9.1, you can use this installation by specifying database connection information during the installation of the IBM Information Server. In this case, do *not* select the Metadata Repository tier. If you have DB2 9.7 installed , upgrade to *DB2 9.7 Fix Pack 3a*. If you have DB2 9.5 installed, upgrade to *DB2 9.5 FP2a* or later.

DB2 9.5 is not supported on 32-bit Linux operating systems. To use DB2 on 32-bit operating systems, you must pre-install DB2 9.1. For details on installing DB2 9.1 servers, see the DB2 information center at the following url: *http://publib.boulder.ibm.com/infocenter/db2luw/v9/topic/com.ibm.db2.udb.uprun.doc/doc/t0008875.htm*

Task 2-2-2: Creating the DB2 Manually for the Repository (Linux, UNIX, Microsoft Windows)

To use an existing installation of the IBM DB2 server, you must run a script to manually create the metadata repository database before you install the IBM InfoSphere Information Server.

Before you create the DB2 manually, ensure that you meet these requirements:

*   The existing instance of DB2 must be on a computer that is accessible by the computers where you install the services and the engine tiers.

*   If the metadata repository also includes the analysis database, the computer that hosts DB2 must also be accessible to clients.

To manually create a DB2 for Linux, UNIX and Microsoft Windows for the metadata repository, see the appropriate *Readme* file in the DatabaseSupport directory of the IBM InfoSphere Information Server installation media, for more details on how to create a DB2 database for the metadata repository.

Task 2-2-3: Creating a DB2 for z/OS Database for the Metadata Repository

On supported Linux operating systems on System z, you can use a DB2 for z/OS database as the metadata repository. The connection is made though JDBC. You must run the provided script to create the database before you install the IBM InfoSphere Information Server.

Before you begin, ensure that you meet the following requirements:

* The existing instance of DB2 must be accessible by the computers where you install the services and the engine tiers.

* If the metadata repository also includes the analysis database, the DB2 instance must also be accessible to clients.

To create a DB2 for z/OS for the metadata repository:

1. Set the DB2 DSNZPARM parameter IDTHTOIN (in the DSN6FAC macro) to 600 seconds before you install the services tier. After installation completes, you can restore this parameter to its original value. This is a system-wide parameter and requires a database administrator to set it.

   Note. The IBM InfoSphere Information Services Director deployment requires the DB2 IDTHTOIN parameter to be set to a value longer than the time that is required to deploy an application. If you do not plan to have your database administrator change this value for each application deployment, then leave the DB2 DSNZPARM set to a value that allows application deployment to succeed.

2. Bind the DB2 Universal Driver JDBC packages before you install the IBM InfoSphere Information Server. Do this bind action from the DB2 command prompt interface that is provided with the Linux operating system running on System z.

   For details on installing the z/OS Application Connectivity to DB2 for z/OS, see the *IBM DB2 Version 9.1 for z/OS Application Programming Guide and Reference for Java*.

3. If you choose to use the same DB2 for z/OS subsystem as the metadata repository for more than one IBM InfoSphere Information Server installation, you must use a different DB2 user ID for each. In DB2 for z/OS, the table namespace is defined only by the DB2 user ID, which allows for name collisions on multiple databases. The IBM InfoSphere Information Server installation program searches for a known metadata repository table and displays a warning if it is detected. If you continue the installation after you see this warning, the existing IBM InfoSphere Information Server repository tables are overwritten, and all of the data in the repository tables is destroyed.

4. See the appropriate *Readme* file in the DatabaseSupport directory of the IBM InfoSphere Information Server installation media for more details on how to create a DB2 database for the metadata repository.

Task 2-2-4: Creating an Oracle Tablespace for the Metadata Repository

To use an Oracle database for the metadata repository, you run a script that creates a tablespace and owner for the metadata repository. You must create the database before you install IBM InfoSphere Information Server.

Before you begin, ensure that you meet the following requirements:

* The Oracle database must be on a computer that is accessible by the computers where you install the services and the engine tiers.

* If the metadata repository also includes the analysis database, the computer that hosts the Oracle database must also be accessible to clients.

To create an Oracle tablespace for the metadata repository:

See the appropriate *Readme* file in the DatabaseSupport directory of the IBM InfoSphere Information Server installation media for more details on how to create an Oracle tablespace for the metadata repository.

Task 2-2-5: Creating a Microsoft SQL Server Database for the Metadata Repository

To use Microsoft SQL Server for the metadata repository, you must run a script to create the database. You must create the database before you install the IBM InfoSphere Information Server.

Before you begin, ensure that you meet the following requirements:

- The Microsoft SQL Server database must be on a computer that is accessible by the computers where you install the services and the engine tiers.

- If the metadata repository also includes the analysis database, the computer that hosts Microsoft SQL Server must also be accessible to clients.

To create a Microsoft SQL server database for the metadata repository, see the appropriate *Readme* file in the *DatabaseSupport* directory of the IBM InfoSphere Information Server installation media, for more details on how to create a Microsoft SQL Server database for the metadata repository.

Task 2-3: Installing the IBM InfoSphere Information Server

This section discusses:

- Understanding Installing the IBM InfoSphere Information Server
- Prerequisites
- Creating a New Installation of the IBM InfoSphere Information Server

Understanding Installing the IBM InfoSphere Information Server

The following checklist guides you through creating a new installation, or adding product components to an existing installation of the IBM InfoSphere Information Server 8.5.

Run the installation program on each computer that you plan to use to host the IBM InfoSphere Information Server tiers for your chosen installation topology. If you install on two or more computers, you must install the tiers in the following order:

1. Metadata Repository
2. Services
3. Engine

You can install the client tier at any time. If you install multiple tiers on the same computer, install them all at the same time within the same installation session.

Prerequisites

Before you begin, ensure that you meet the following requirements:

1. Read and complete the planning steps. For a complete list of planning steps, see the IBM documentation.

   See *IBM Information Server 8.5 Planning, Installation, and Configuration guide,* " Planning for the Installation of IBM InfoSphere Information Server."

2. Before you attempt a new installation of the IBM InfoSphere Information Server, back up all of your critical data. If you are adding an additional product module, back up your current IBM InfoSphere Information Server components and critical data. Also, back up the following items:

   Linux /UNIX:

   Back up /etc/services, /etc/inittab, /etc/passwd, and /etc/group

   Microsoft Windows:

   Back up the Microsoft Windows registry.

   Failures during installation or upgrade may result in the installation being left in a non-operational state.

3. *Microsoft Windows*: If MKS Toolkit is already installed, you must uninstall it before you run the IBM InfoSphere Information Server installation program. MKS Toolkit 9.5 is installed as part of the IBM InfoSphere Information Server.

   If an existing, earlier version of MKS Toolkit is already installed, the IBM InfoSphere Information Server installation program attempts to upgrade the installation to MKS Toolkit 9.5.

4. In a non-English environment, the installation program uses the system's local setting. Refer to Encodings supported by IBM InfoSphere Information Server to determine if your locale is supported. If it is not listed, English is installed, but with national language support (NLS) enabled.

5. If you plan to use an existing database on a different computer as your metadata repository, ensure that the computer where you install the services tier has network connectivity.

6. Access the installation media from a local file system or optical drive. The installation program requires uninterrupted connectivity to the installation media. Even a momentary interruption in connectivity may cause the installation to fail. The best practice is to copy the contents of the installation media to a local file system and run the installation program from there.

7. Disable firewall software and antivirus software during the installation session. Some antivirus software blocks the installation program and network operations from running or prompts for a confirmation. These actions interfere with the installation program and may cause a silent installation to fail.

8. *Linux*: If Security Enhanced Linux (SELinux) is enabled, you must disable it before installing the IBM InfoSphere Information Server.

   For more information about how to disable SELinux, see the Linux documentation.

Task 2-3-1: Creating a New Installation of the IBM InfoSphere Information Server

This section discusses:

• Understanding Creating a New Installation of the IBM InfoSphere Information Server

• Installing the Services Tier

• Installing the Engine Tier

• Installing the FIX Pack

Understanding Creating a New Installation of the IBM InfoSphere Information Server

The installation steps differ based on the type of typology. This task guides you through the installation of the IBM InfoSphere Information server for a *Dedicated Engine tier (Recommended)* topology, as explained in the section "Reviewing Topology Types" earlier in this chapter.

To create a new installation of the IBM InfoSphere Information Server for a *Dedicated Engine tier* topology, you must install the Services tier first on the first computer, and then install the Engine tier on the second computer.

Note. *For IBM AIX – Optional:* Set the JITC_COMPILEOPT and IBM_MIXED_MODE_THRESHOLD environment variables as shown to improve installation program performance.

```
export JITC_COMPILEOPT=NALL
export IBM_MIXED_MODE_THRESHOLD=100
```

Installing the Services Tier

To install the services tier:

1. Log on to the computer.

   • *For Linux\ UNIX:* Log on as the root user.

   • *For Microsoft Windows:* Log on as a local administrator or as a local or domain user who is directly assigned to the local Administrators group.

     Note. You must log on as a user that is directly assigned to the Administrators group. The installation program does not operate correctly for users who are indirectly assigned to the Administrators group; for example, users who are assigned to a group that is assigned to the Administrators group, or domain users who are assigned to a domain group that is assigned to the Administrators group.

2. *Linux/UNIX:* Open a command prompt or shell window and change to the directory location of the installation image.

3. *Linux/UNIX:* Set the file creation mask to 022: *umask 022*

4. *Linux/UNIX:* Ensure that you have enough system resources allocated for the installation. Set the file descriptor limit to 102400, a higher value, or unlimited.

   For example: *ulimit -n unlimited*

   Be sure to check the current setting for the NOFILES kernel parameter. This parameter must be set to a value that is at least equal to the value that you specify for ulimit.

5. *Linux/UNIX:* Ensure that the lock daemon is running.

   ```
   ps -ef | grep -i lockd
   ```

   If it is not running, see your operating system documentation for the preferred method of starting daemon services such as this.

6. Start the installation program.

   IBM InfoSphere Information Server installation program - Login page appears, as shown in the following example:

IBM Information Server installation program - Login page

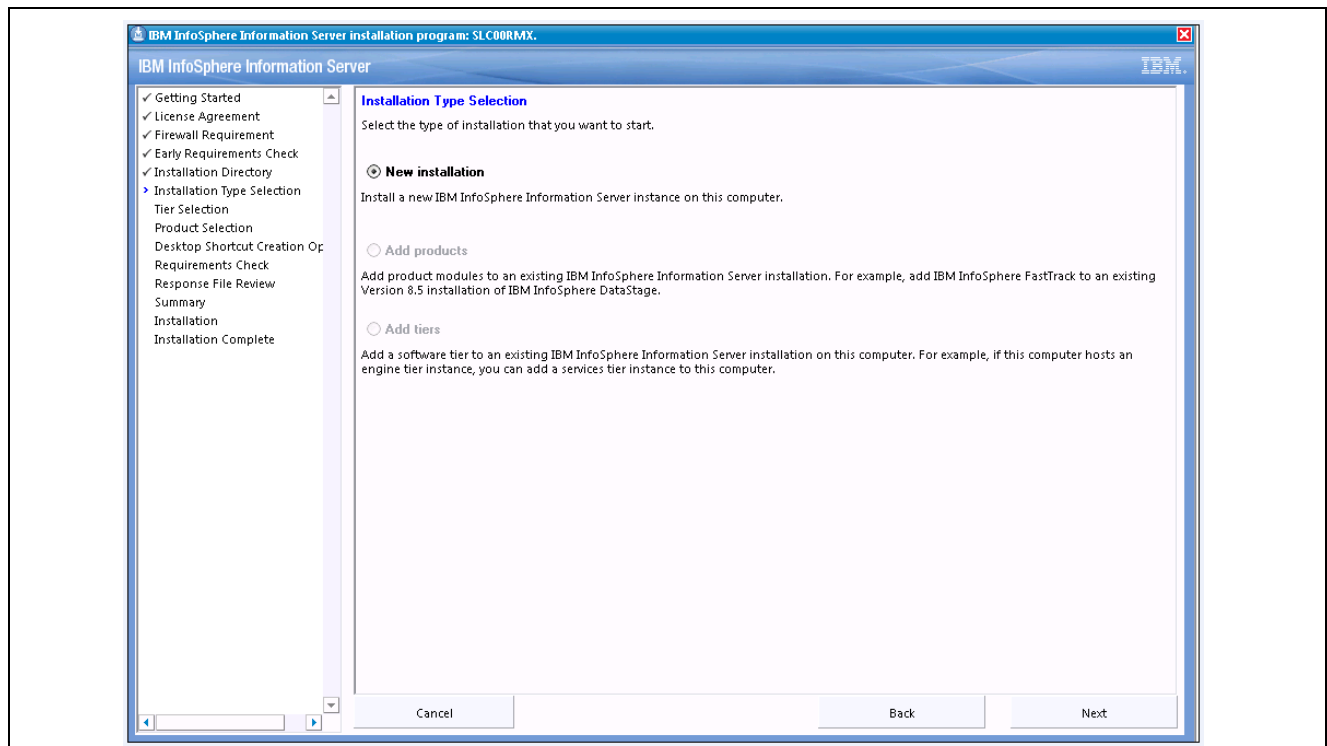After you log in, the IBM InfoSphere Information Server - Getting Started page appears, as shown in the following example:

IBM InfoSphere Information Server - Getting Started page

Note. You can run the installation program by using a Wizard. To run the installation program without a graphical interface, you can run it in console or silent mode. For more details on running the installation program in console or silent mode, see the *IBM Information Server 8.5 Planning, Installation, and Configuration Guide*, InstallationGuide.i46iepic.pdf, that is included in your download.

7. Click Next to continue.

The Software License Agreement page appears, as shown in the following example:

IBM InfoSphere Information Server - Software License Agreement page

8. Accept the license agreement terms and click Next to continue.

The Firewall Requirement page appears, as shown in the following example:

IBM InfoSphere Information Server - Firewall Requirement page

9. Ensure that the firewall is disabled, and then click Next.

The Early Requirements Check page appears, as shown in the following example:

IBM InfoSphere Information Server - Early Requirements Check page

10. Ensure that the Early Requirements Check completes and passes, and then click Next.

The IBM InfoSphere Information Server - Installation Directory page appears, as shown in the following example:

IBM InfoSphere Information Server - Installation Directory page

11. Ensure that a valid installation directory is provided, and then click Next.

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

IBM InfoSphere Installation Server - Installation Type Selection page

12. Select the New Installation option (if you are installing for the first time), and then click Next to continue.

The IBM Information Server - Tier Selection page appears, as shown in the following example:

IBM InfoSphere Information Server - Tier Selection page

13. The installation program prompts you to select the tiers to install. See the *Reviewing and Selecting an Installation Topology* section and the table of topologies discussed earlier in this chapter.

14. When the installation program prompts you to select the products to install, always select all of the products that you want to install. Many products have components that must be installed on one or more tiers; therefore, the program prompts you to select the products multiple times.

    The following table shows products or components and the tiers on which you must install them:

Product or Component	Tiers on Which to Install
IBM InfoSphere DataStage and QualityStage	Services, Engine, Client.
IBM InfoSphere Metadata Server	Metadata Repository, Services.
The client is installed separately.	Not applicable.

15. Install the metadata repository tier if you are using the DB2 database that is installed as part of the IBM InfoSphere Information Server installation program or a local pre-existing installation of the DB2 server.

    Note. If you are using a remote installation of DB2, or if you are using an Oracle database or a Microsoft SQL Server database for the metadata repository database, do *not* install the metadata repository tier.

    The following example shows the IBM Information Server Tier Selection page with the Services option selected:
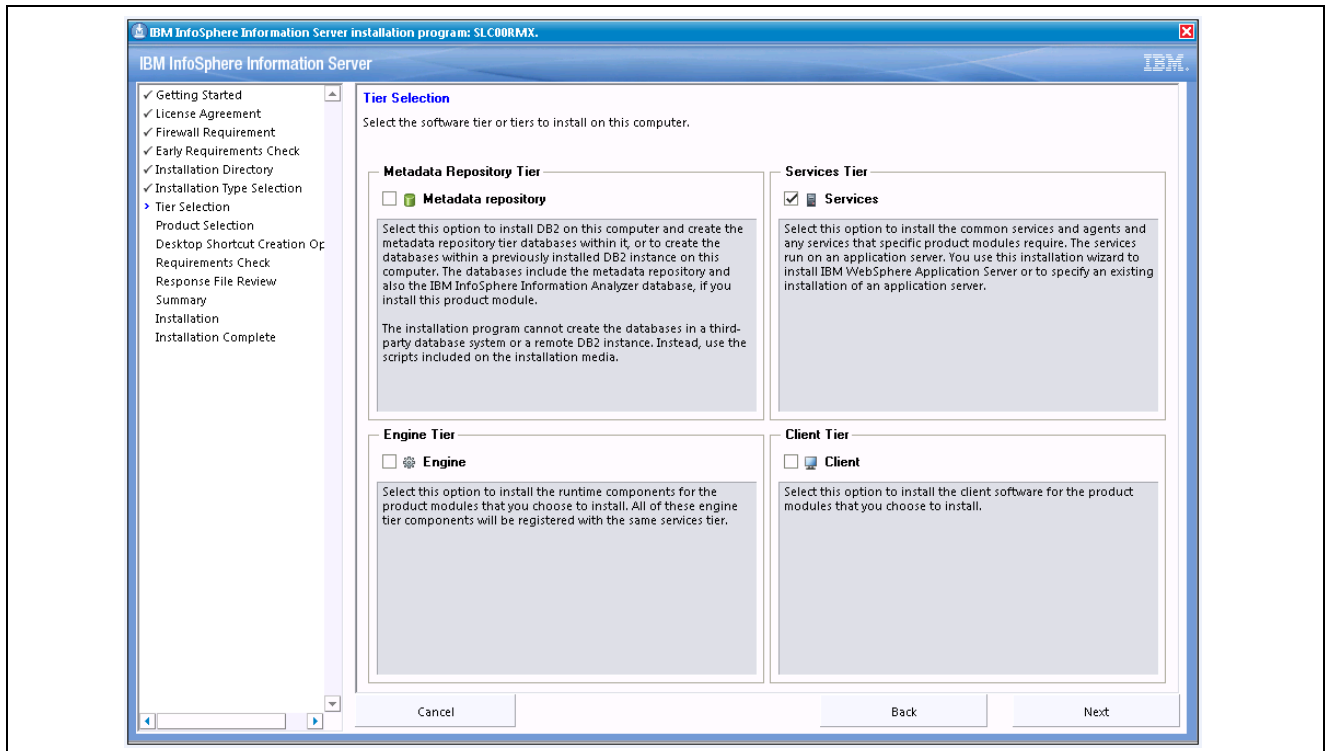
IBM InfoSphere Information Server - Tier Selection page

16. On the Tier Selection page, select the Services check box as shown in the preceding example.

Note. The installation steps differ based on the type of typology. This task guides you through the installation of the IBM InfoSphere Information server for a *Dedicated Engine tier (Recommended)* topology, as explained in the section *Reviewing Topology Types* earlier in this chapter. For the Dedicated Engine tier (Recommended) topology, you must install the Services tier first on the first computer, and then install the Engine tier on the second computer.

---

17. Click Next to continue.

The IBM Information Server - Product Selection page appears, as shown in the following example:
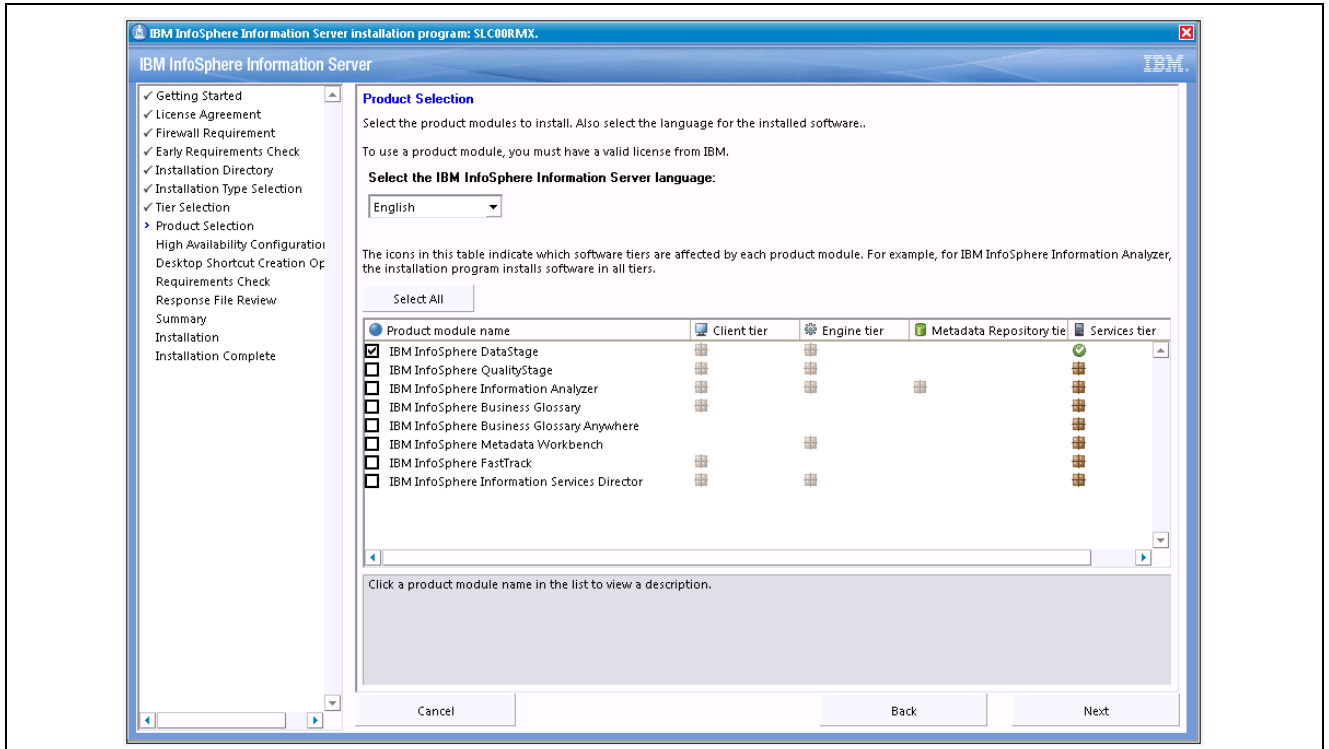
IBM InfoSphere Information Server - Product Selection page

18. Select the IBM InfoSphereDataStage check box, and then click Next.

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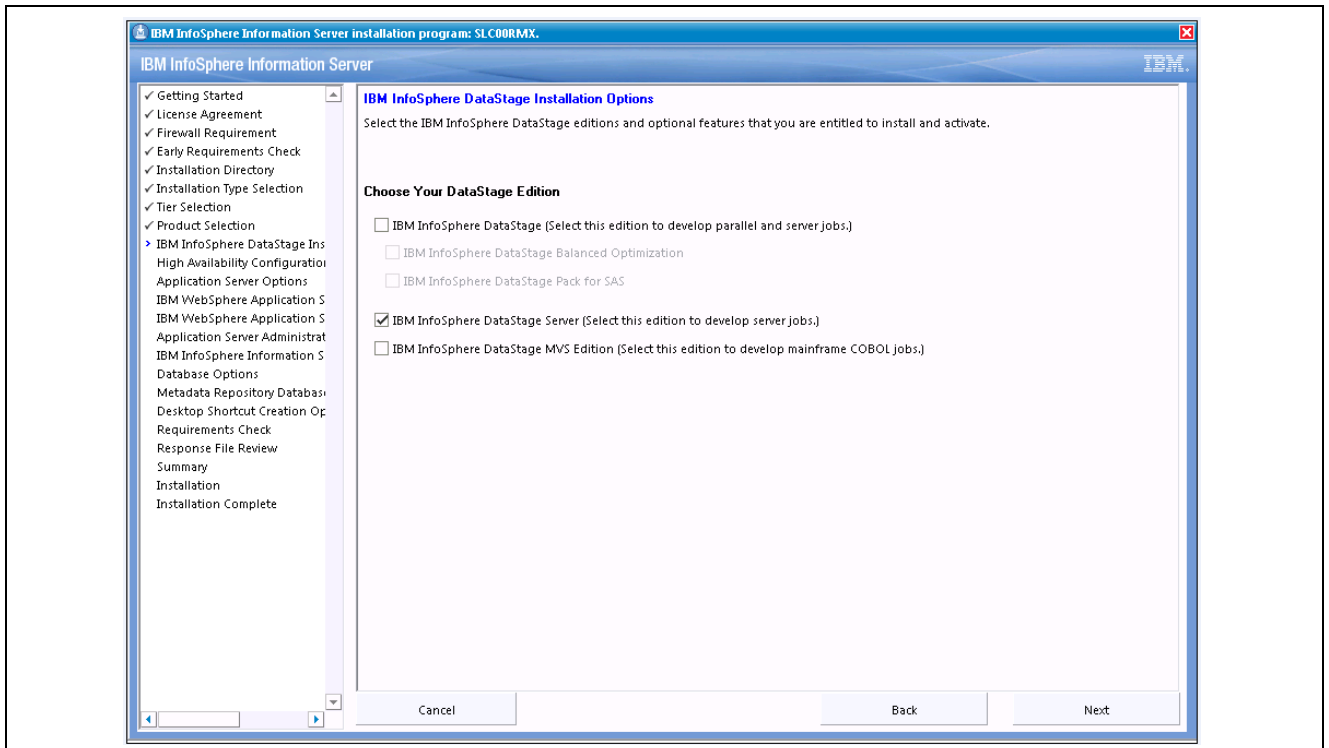
IBM InfoSphere DataStage Installation Options page

19. Select the IBM InfoSphere DataStage Server (select this edition to developserver jobs) option, and then click Next.

The High Availability Server Cluster Configuration page appears, as shown in the following example:
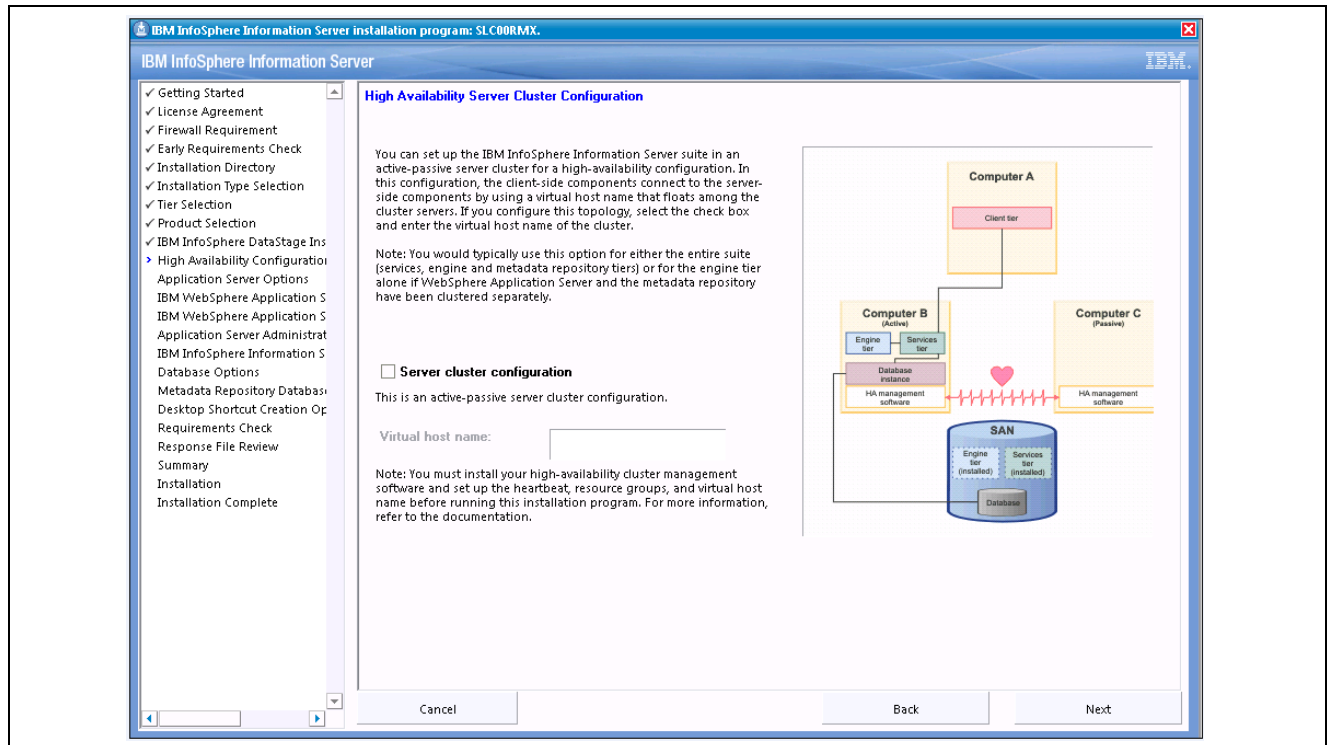
IBM InfoSphere Information Server - High Availability Server Cluster Configuration page

20. Select the Server cluster configuration check box if you want to set up the IBM InfoSphere Information Server suite in an active-passive server cluster for high availability configuration.

Then click Next.

The IBM InfoSphere Information Server - Application Server Options page appears, as shown in the following example:
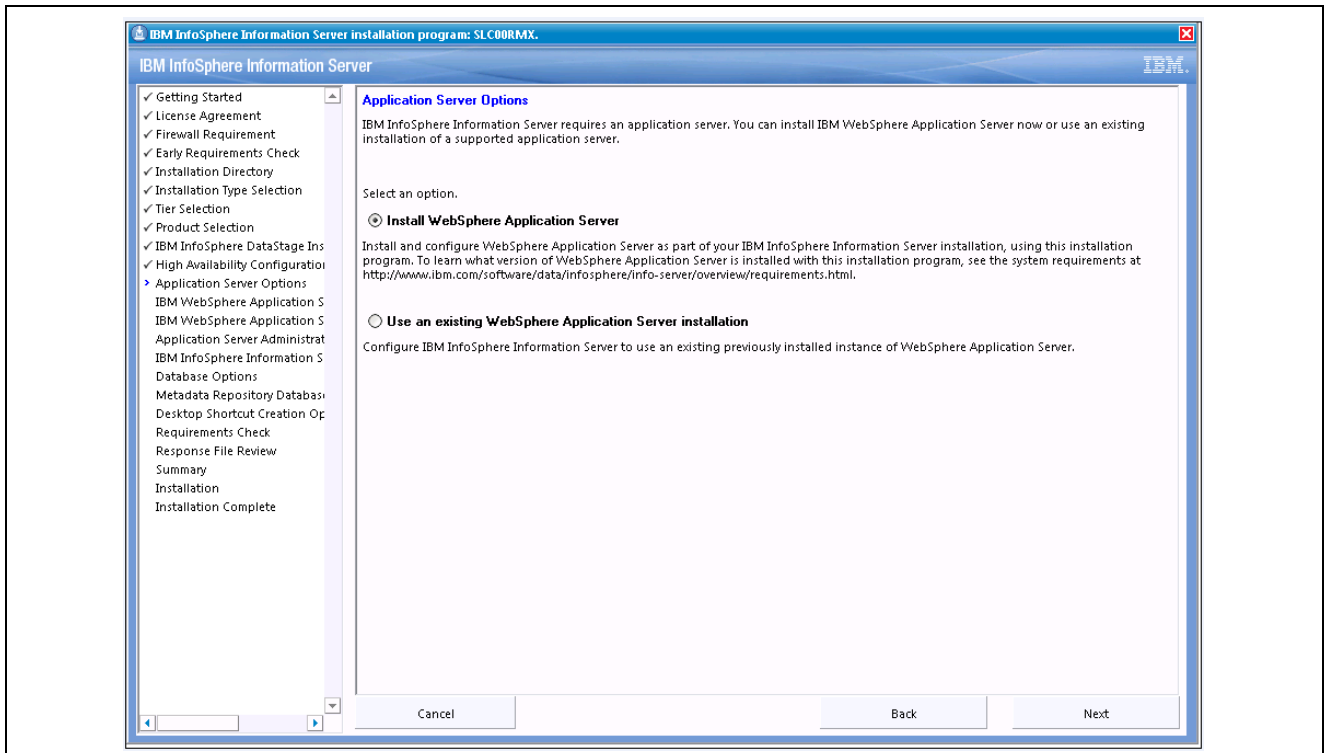
IBM InfoSphere Information Server - Application Server Options page

21. On the Application Server Options page, do one of the following:

- Select the option *Install WebSphere Application Server*, to install the WebSphere Application Server.

- Select the option *Use an existing WebSphere Application Server installation*, to use the existing supported WebSphere Application Server.

22. Click Next to continue.

The IBM WebSphere Application Server Installation Directory page appears, as shown in the following example:
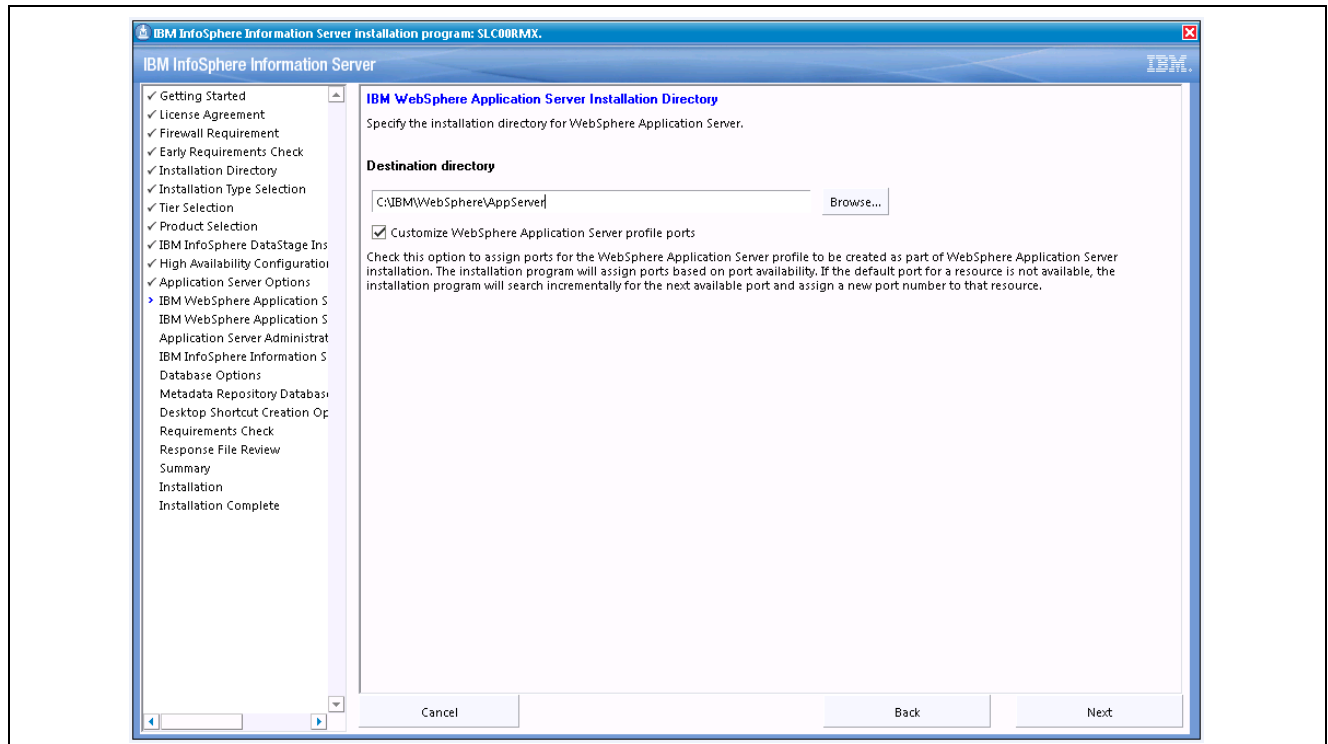
 IBM WebSphere Application Server Installation Directory page

23. On the Application Server Installation Directory page, do the following:

    a. In the Destination directory field, enter or browse to the directory where you want to install the IBM WebSphere Application Server Installation files.

    b. Select the Customize WebSphere Application Server profile ports check box, to change default port values for the IBM WebSphere Application Server.

24. Click Next.

    The IBM WebSphere Application Server Profile Ports Assignment page appears, as shown in the following example:
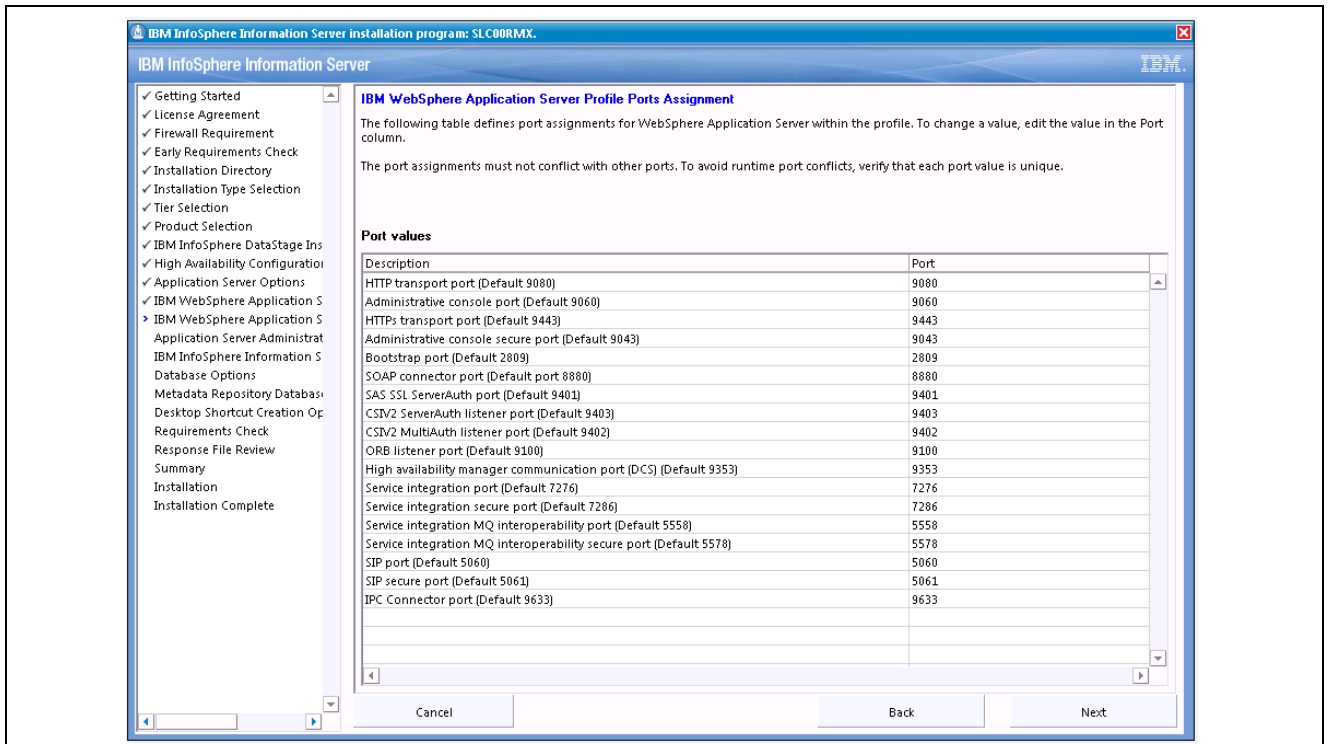
IBM WebSphere Application Server Profile Ports Assignment page

25. Change port values as needed, and then click Next.

    The Application Server Administrator page appears, as shown in the following example:
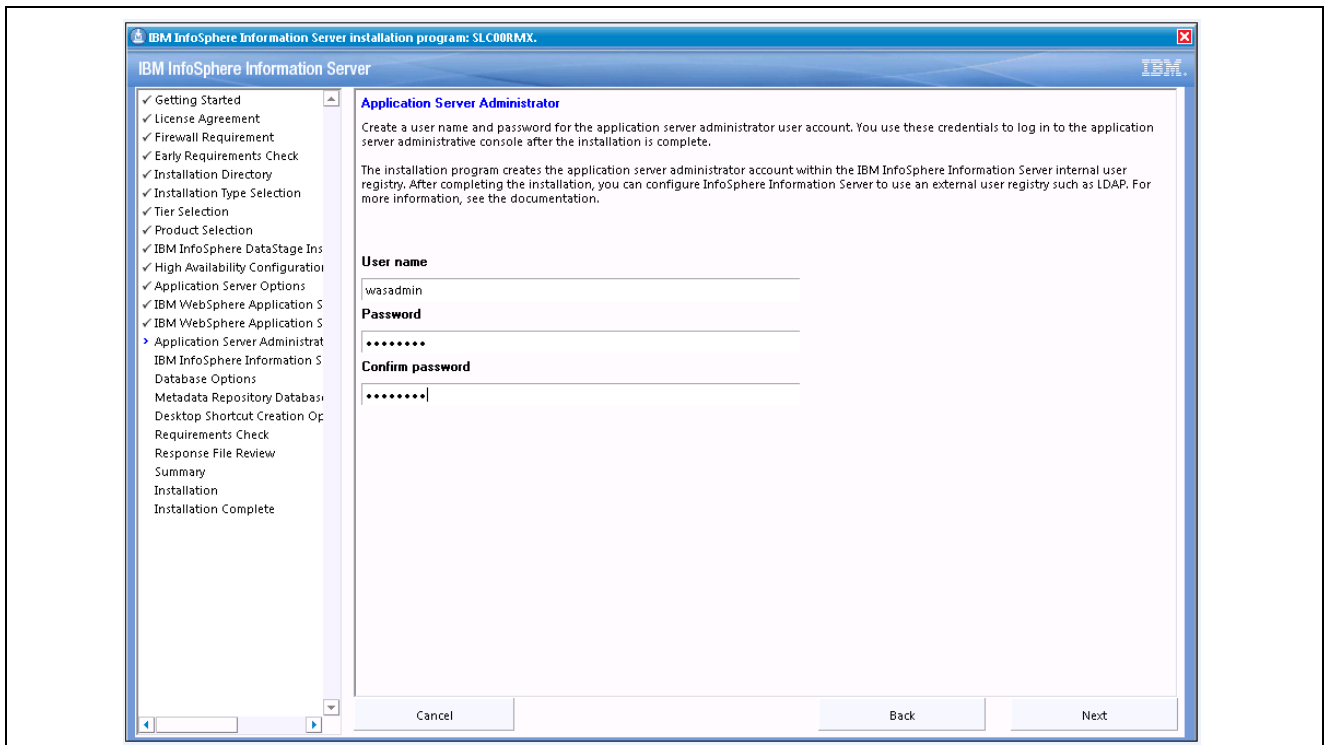
Application Server Administration page

26. On the Application Server Administrator page, do the following:

       a. In the User name field, enter your user name.

       b. In the Password field, enter your password.

       c. In the Confirm Password field, enter your password again for confirmation.

27. Click Next.

The IBM InfoSphere Information Server Administrator page appears, as shown in the following example:
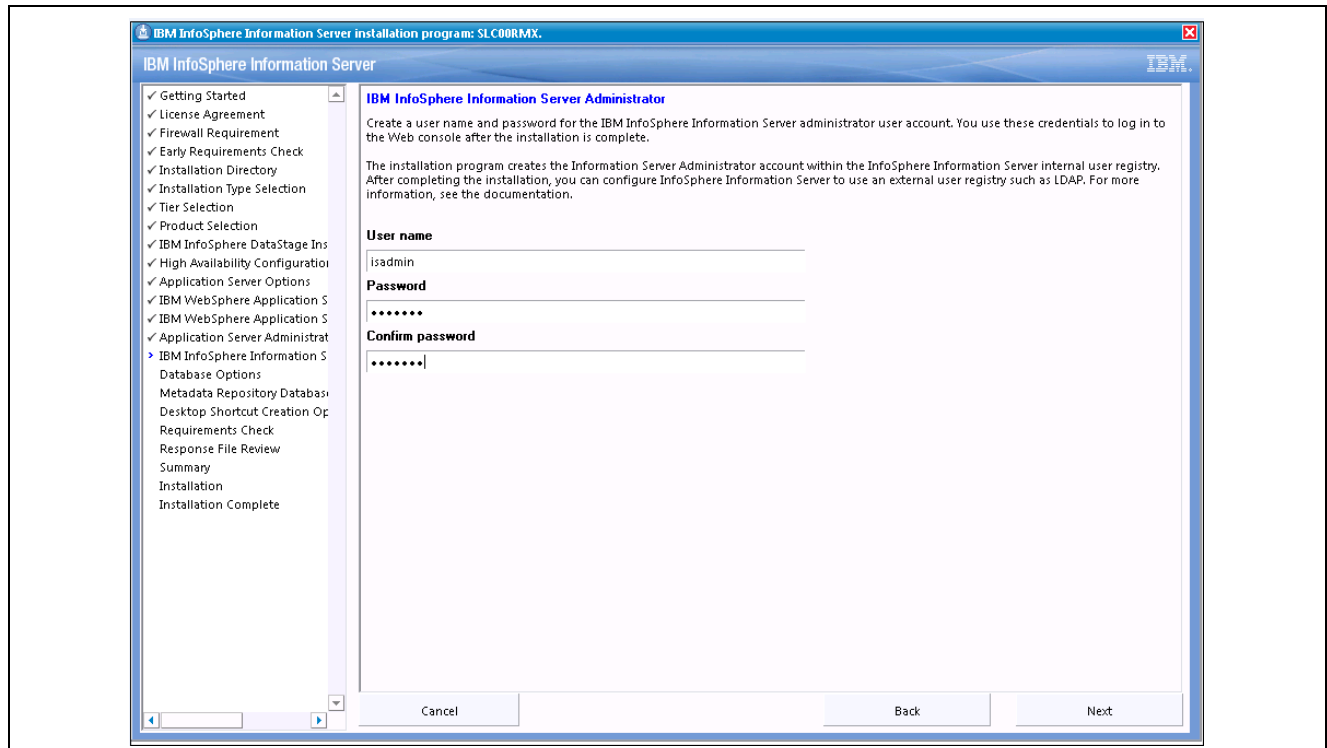
IBM InfoSphere Information Server Administrator page

28. On the IBM InfoSphere Information Server Administrator page, do the following:

       a. In the User name field, enter your user name.

       b. In the Password field, enter your password.

       c. In the Confirm Password field, enter your password again for confirmation.

29. Click Next.

The Database Management System Selection page appears, as shown in the following example:
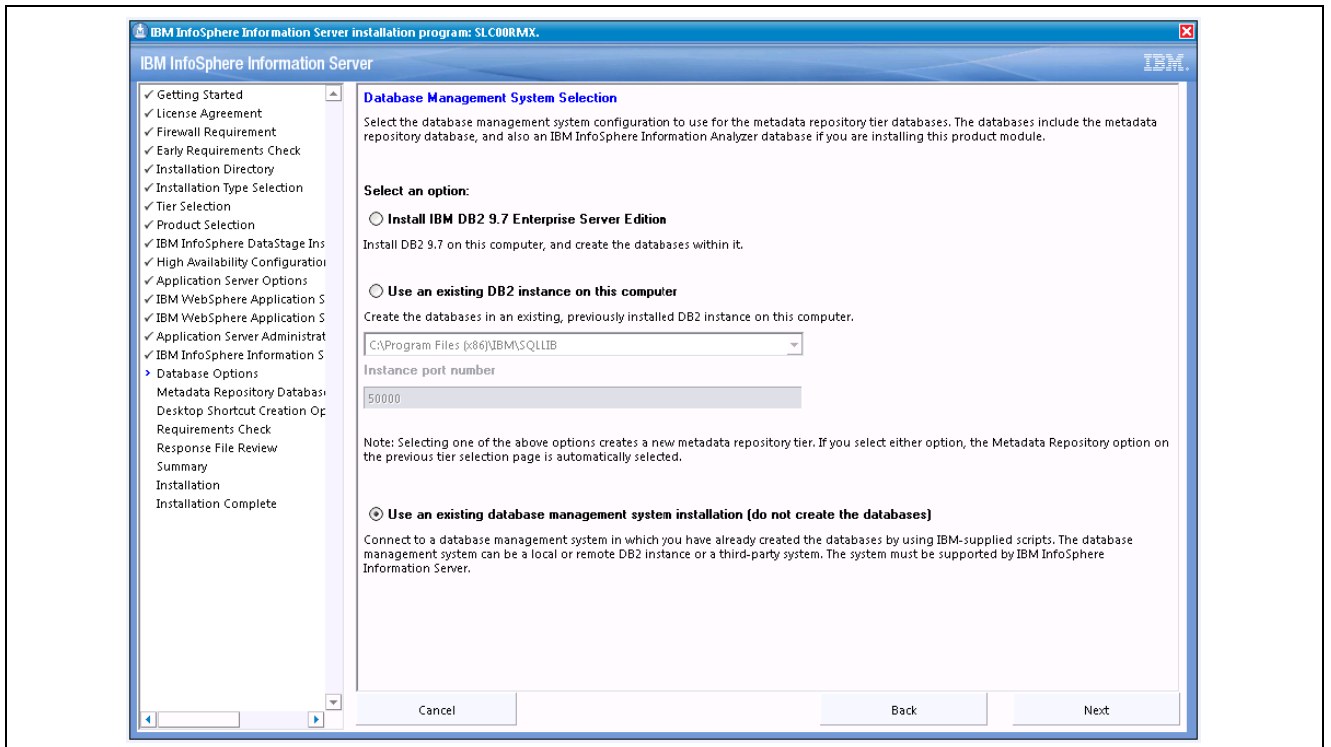
Database Management System Selection page

30. On the Database Management System Selection page, do one of the following:

- Select the option *Install IBM DB2 9.7 Enterprise Server Edition*, to install DB2 9.7 on this computer and create the database within it.

- Select the option *Use an existing DB2 instance on this computer*, to create the databases in existing, previously installed instances on this computer.

- Select the option *Use an existing database management system installation (do not create the databases)*, to connect a database management system in which you have already created databases by using scripts.

    The database management system can be a remote DB2 instance or Oracle, SQL Server.

31. Click Next.

    The Database connection page appears, as shown in the following example:
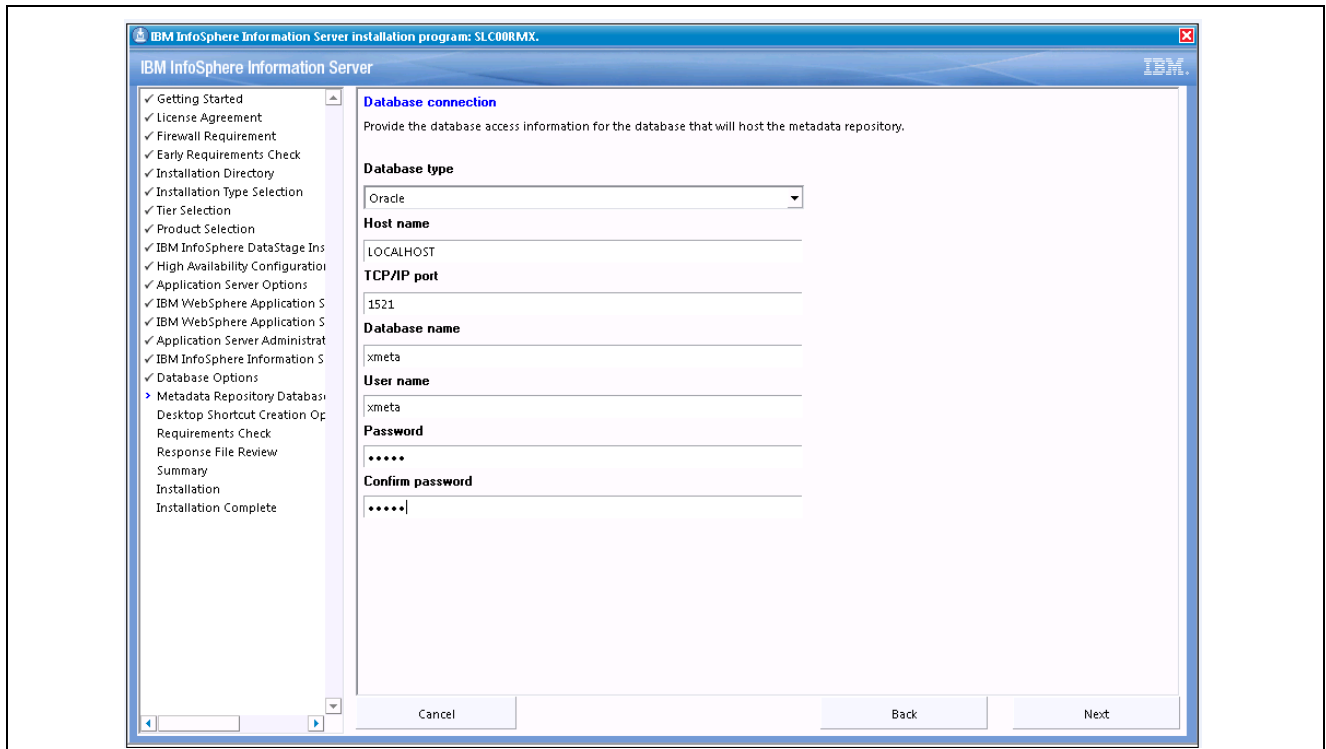
Database connection page

32. On the Database connection page, provide the database access information for the database that will host the metadata repository as follows:

   a. In the Database type field, select the database type from the drop-down list box.

      For example: Oracle

   b. In the Host name field, enter the host name.

      For example: localhost

   c. In the TCP/IP port field, enter the port number.

      For example: 1521

   d. In the Database name field, enter the database name.

      For example: XMETA

   e. In the User name field, enter your user name.

      For example: D585META

   f. In the Password field, enter your password.

      For example: yourpassword

   g. In the Confirm password field, enter your password again for confirmation.

33. Click Next.

   The Desktop Shortcut Creation Option page appears, as shown in the following example:
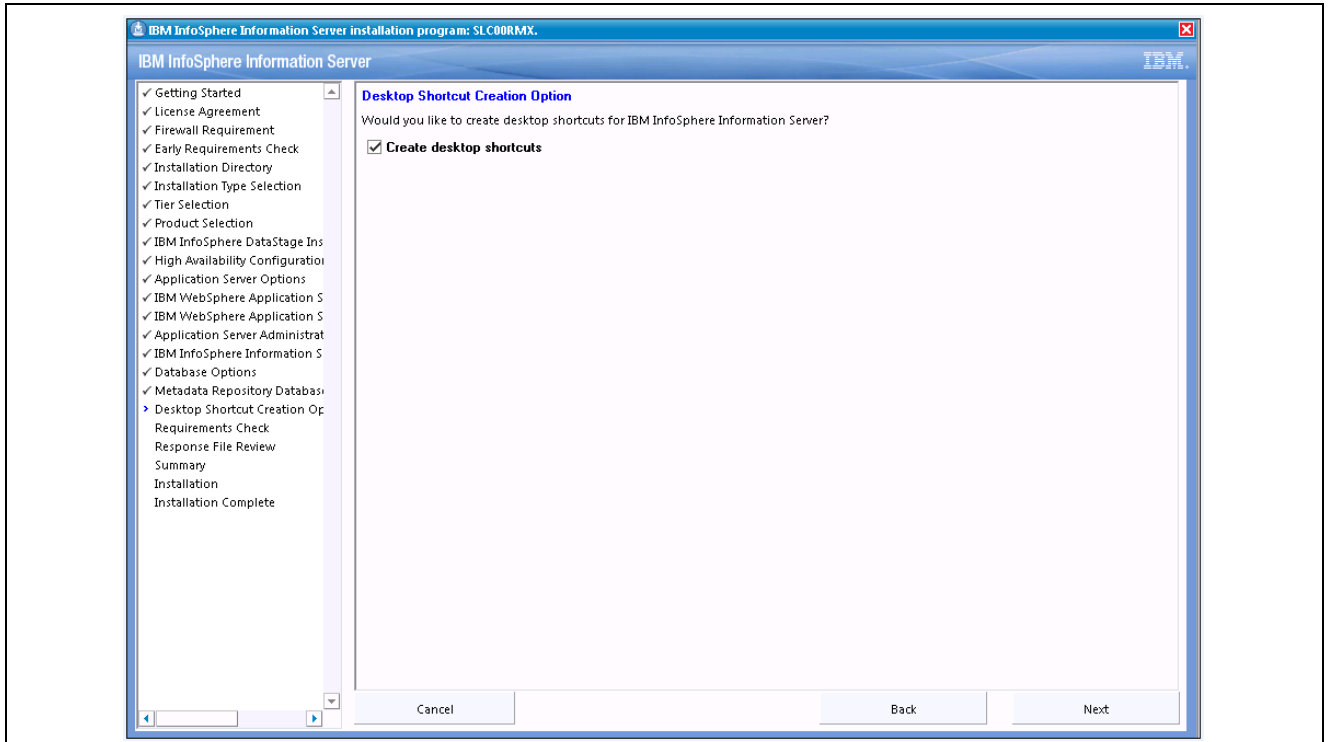
IBM InfoSphere Information Server - Desktop Shortcut Creation Option page

34. Select the Create desktop shortcuts check box, and then click Next.

The System Requirements Check page appears, as shown in the following example:
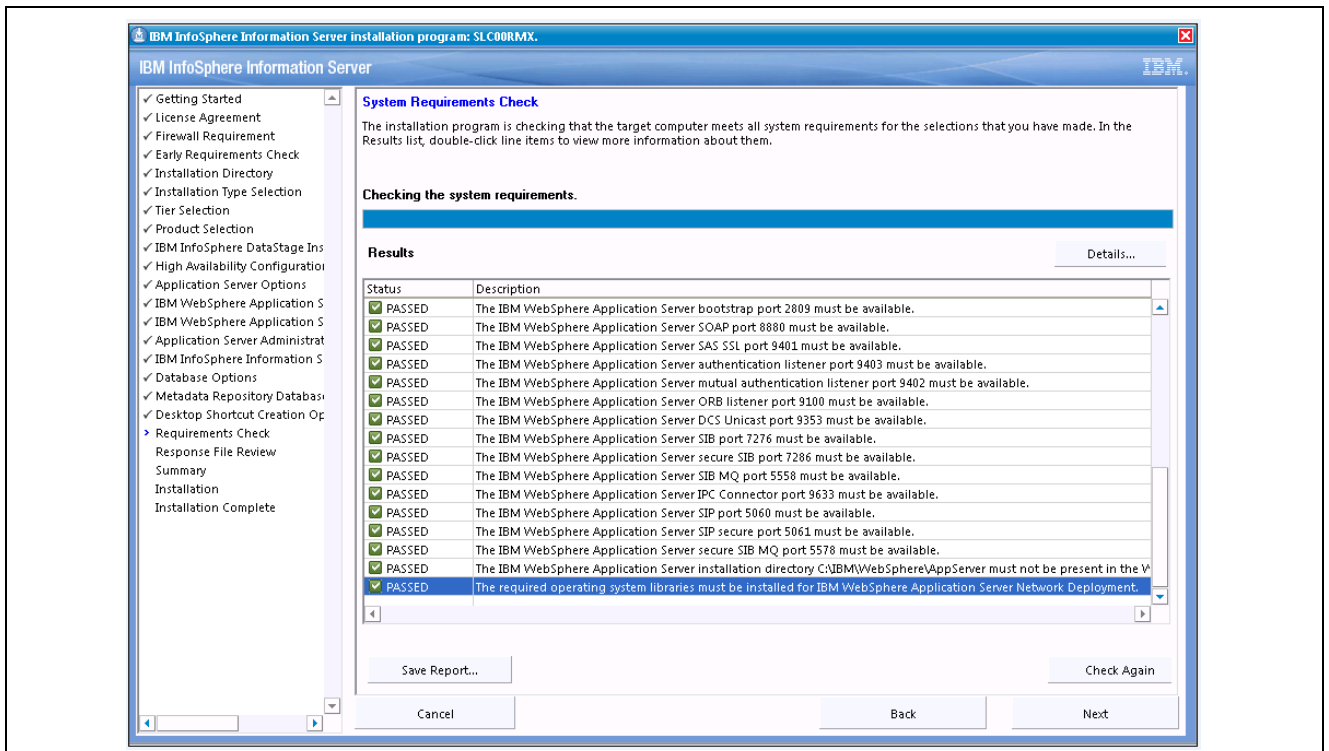
IBM InfoSphere Information Server - System Requirements Check page

35. Review the system requirements and make sure the status of each requirement shows PASSED. Then click Next.

The Response File Review page appears, as shown in the following example:
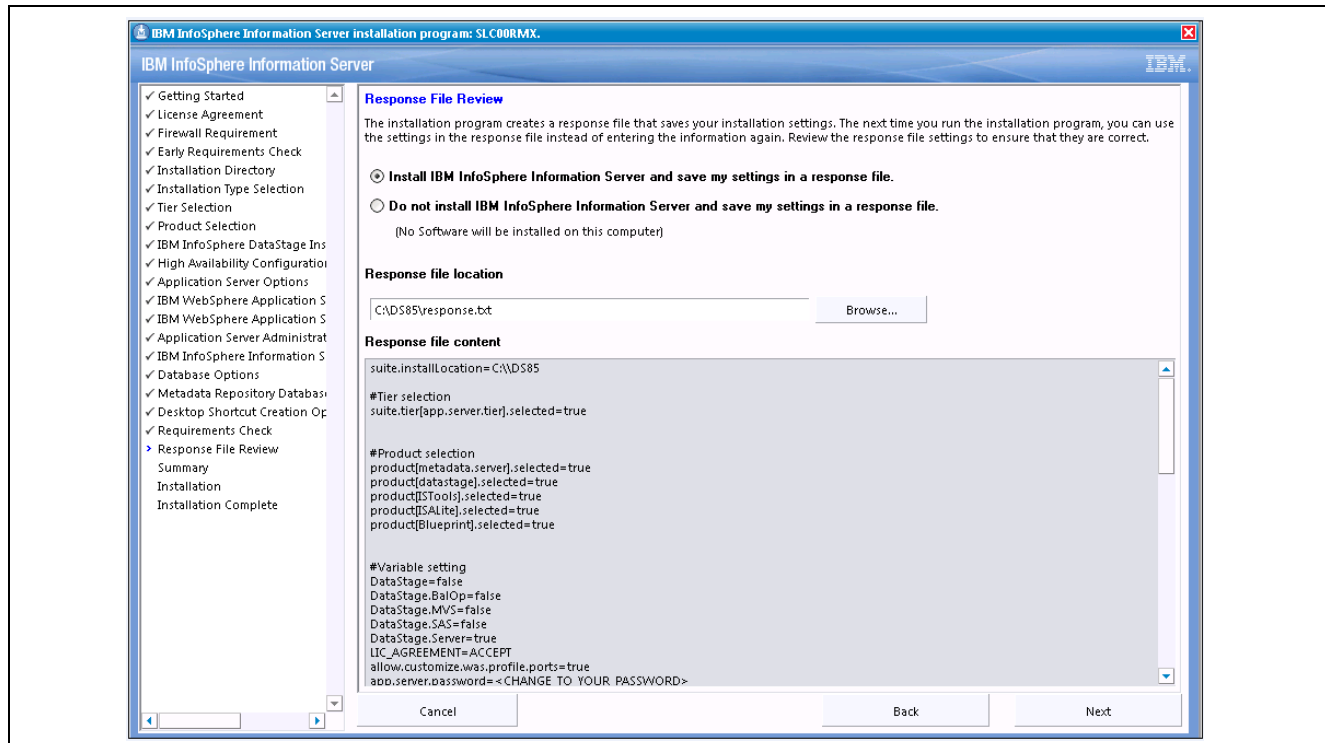
IBM InfoSphere Information Server - Response File Review page

36. On the Response File Review page, do one of the following:

- Select the option *Install IBM Information Server and save my settings in a response file*, to install software and save response file in a selected Response file location.

- Select the option *Do not install IBM Information Server and save my settings in a response file*, to save the response file in a selected Response file location (No software will be installed on this computer).

37. Click Next to continue.

The Preinstallation Summary for the Current Computer page appears, as shown in the following example:
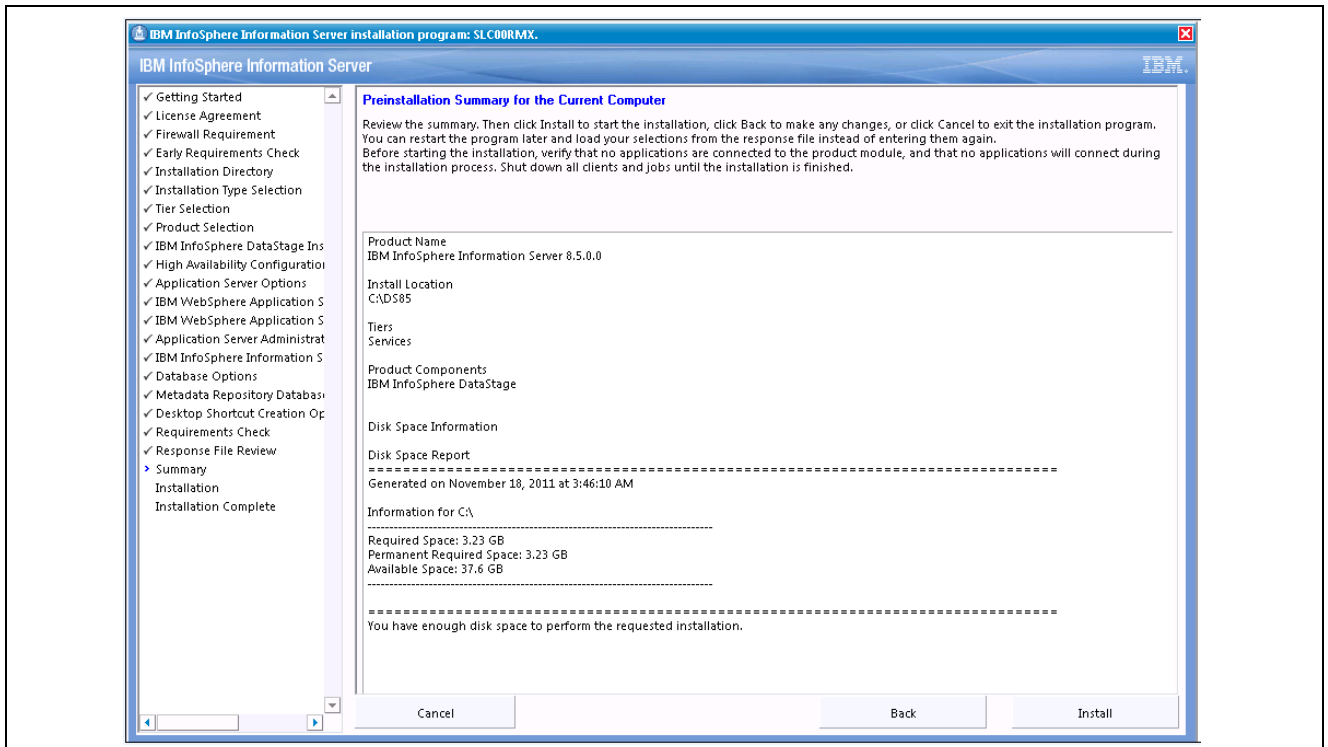
IBM InfoSphere Information Server - Preinstallation Summary for the Current Computer page

38. Review the preinstallation summary details for the current computer, and then click the Install button.

Installing the Engine Tier

To install the Engine tier:

1. Log on to the computer.

   • *For Linux\ UNIX:* Log on as the root user.

   • *For Microsoft Windows:* Log on as a local administrator or as a local or domain user who is directly assigned to the local Administrators group.

   > **Note.** You must log on as a user that is directly assigned to the Administrators group. The installation program does not operate correctly for users who are indirectly assigned to the Administrators group; for example, users who are assigned to a group that is assigned to the Administrators group, or domain users who are assigned to a domain group that is assigned to the Administrators group.

2. *Linux/UNIX:* Open a command prompt or shell window and change to the directory location of the installation image.

3. *Linux/UNIX:* Set the file creation mask to 022: *umask 022*

4. *Linux/UNIX:* Ensure that you have enough system resources allocated for the installation. Set the file descriptor limit to 102400, a higher value, or unlimited.

   For example: *ulimit -n unlimited*

   Be sure to check the current setting for the NOFILES kernel parameter. This parameter must be set to a value that is at least equal to the value that you specify for ulimit.

5. *Linux/UNIX:* Ensure that the lock daemon is running.

```
ps -ef | grep -i lockd
```

If it is not running, see your operating system documentation for the preferred method of starting daemon services such as this.

6. Start the installation program.
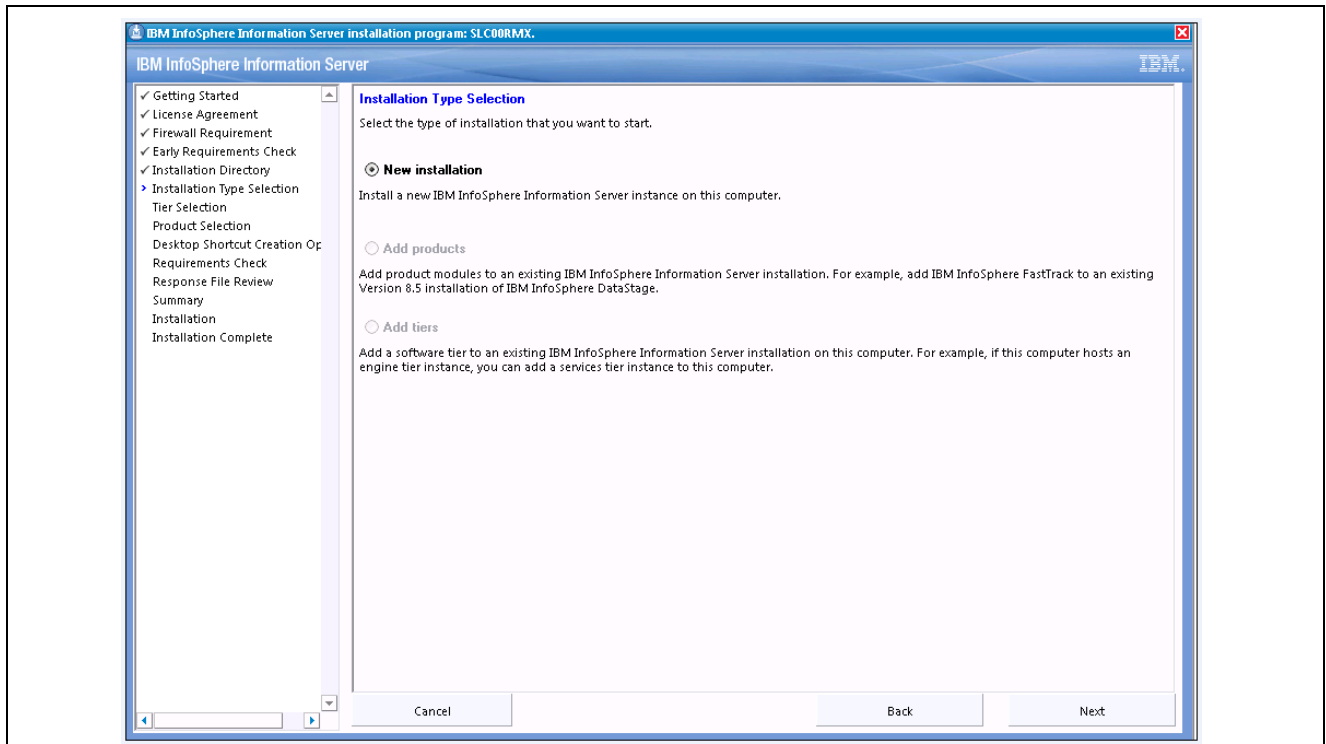
   IBM InfoSphere Information Server installation program - Login page appears, as shown in the following example:

IBM Information Server installation program - Login page

After you log in, the IBM InfoSphere Information Server - Getting Started page appears, as shown in the following example:
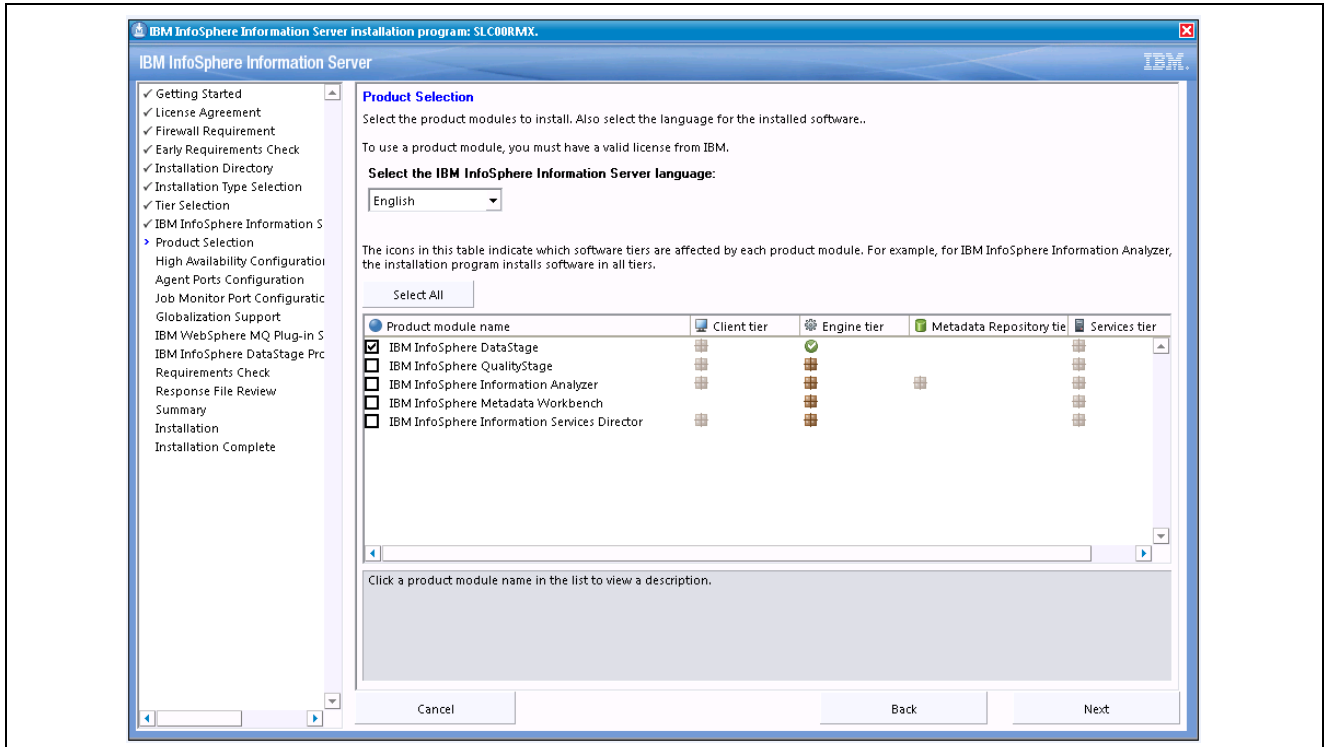
IBM InfoSphere Information Server - Getting Started page

> **Note.** You can run the installation program by using a Wizard. To run the installation program without a graphical interface, you can run it in console or silent mode. For more details on running the installation program in console or silent mode, see the *IBM Information Server 8.5 Planning, Installation, and Configuration Guide*, InstallationGuide.i46iepic.pdf, that is included in your download.

7. Click Next to continue.

    The Software License Agreement page appears, as shown in the following example:

IBM InfoSphere Information Server - Software License Agreement page

8.   Accept the license agreement terms and click Next to continue.

The Firewall Requirement page appears, as shown in the following example:

IBM InfoSphere Information Server - Firewall Requirement page

9.   Ensure that the firewall is disabled, and then click Next.

The Early Requirements Check page appears, as shown in the following example:

IBM InfoSphere Information Server - Early Requirements Check page

10. Ensure that the Early Requirements Check completes and passes, and then click Next.

The IBM InfoSphere Information Server - Installation Directory page appears, as shown in the following example:

IBM InfoSphere Information Server - Installation Directory page

11. Ensure that a valid installation directory is provided, and then click Next.

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

IBM InfoSphere Installation Server - Installation Type Selection page

12. Select the New Installation option (if you are installing for the first time), and then click Next to continue.

The IBM Information Server - Tier Selection page appears, as shown in the following example:

IBM InfoSphere Information Server - Tier Selection page

The following example shows the Tier Selection page with the Engine check box selected:
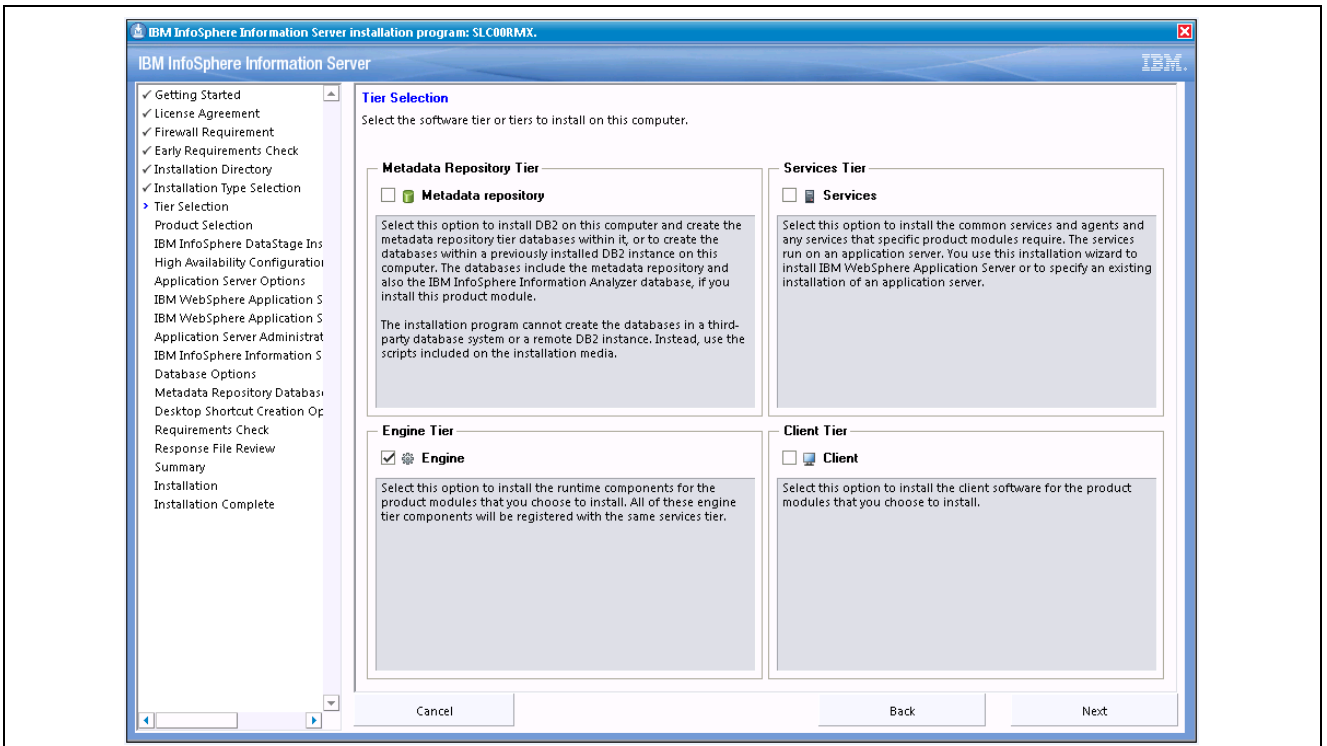
IBM InfoSphere Information Server - Tier Selection page

13. On the Tier Selection page, select the Engine check box as shown in the preceding example, and then click Next.

    The IBM InfoSphere Information Server Location page appears, as shown in the following example:
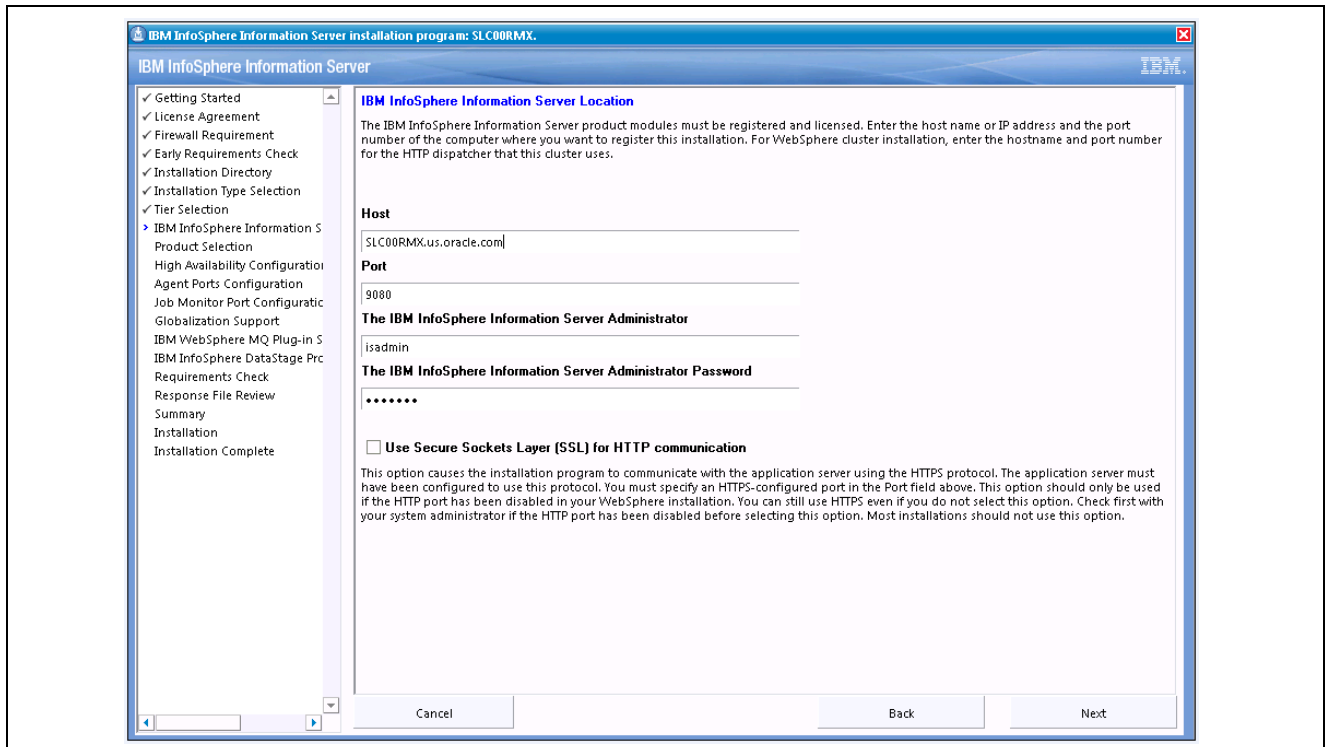
 IBM InfoSphere Information Server Location page

14. On the IBM InfoSphere Information Server Location page, provide the IBM InfoSphere Information Server details, (such as the host name, port, administrator user name, user password), and then click Next.

    The Product Selection page appears, as shown in the following example:

IBM InfoSphere Information Server - Product Selection page

15. Verify that the IBM InforSphere DataStage product is selected, and then click Next.

The High Availability Server Cluster Configuration page appears, as shown in the following example:
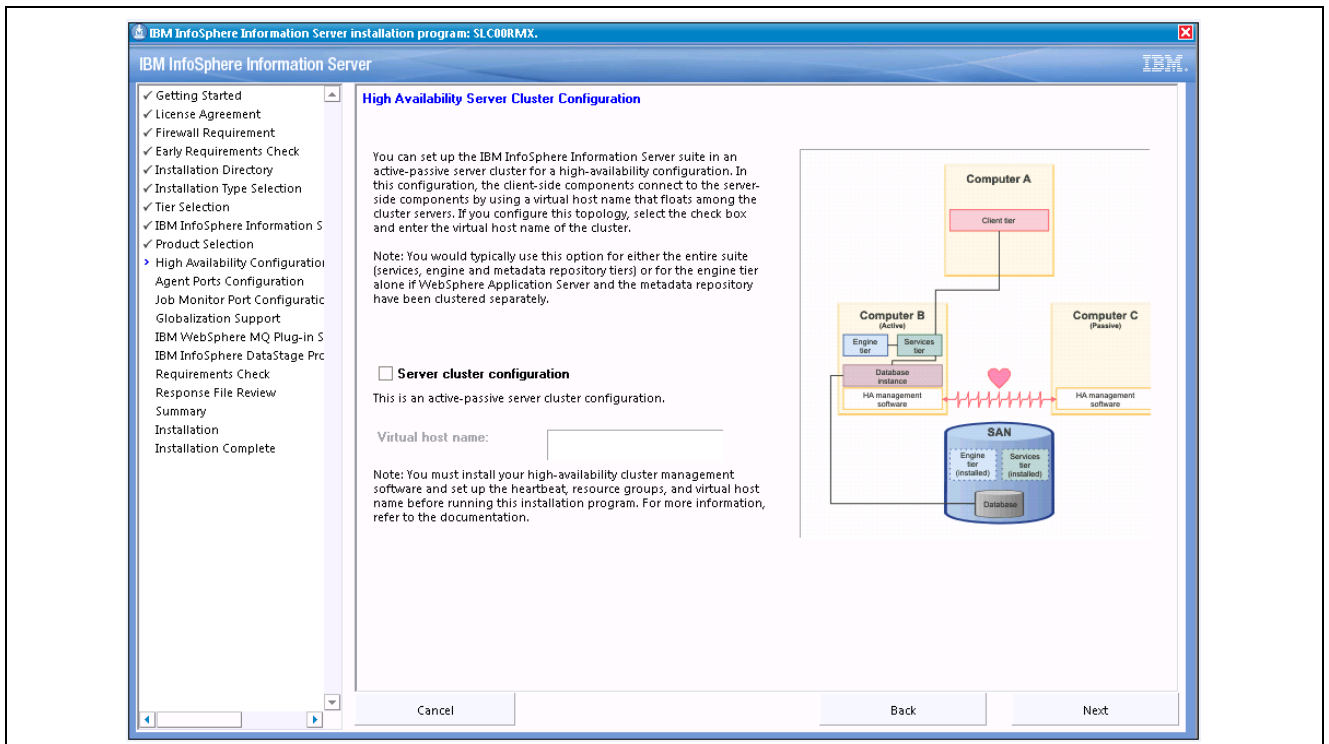
High Availability Server Cluster Configuration page

16. Select the Server cluster configuration check box if you want to set up the IBM InfoSphere Information Server suite in an active-passive cluster for a high availability configuration.

Click Next. The IBM InfoSphere Information Server Agent ports Configuration page appears, as shown in the following example:
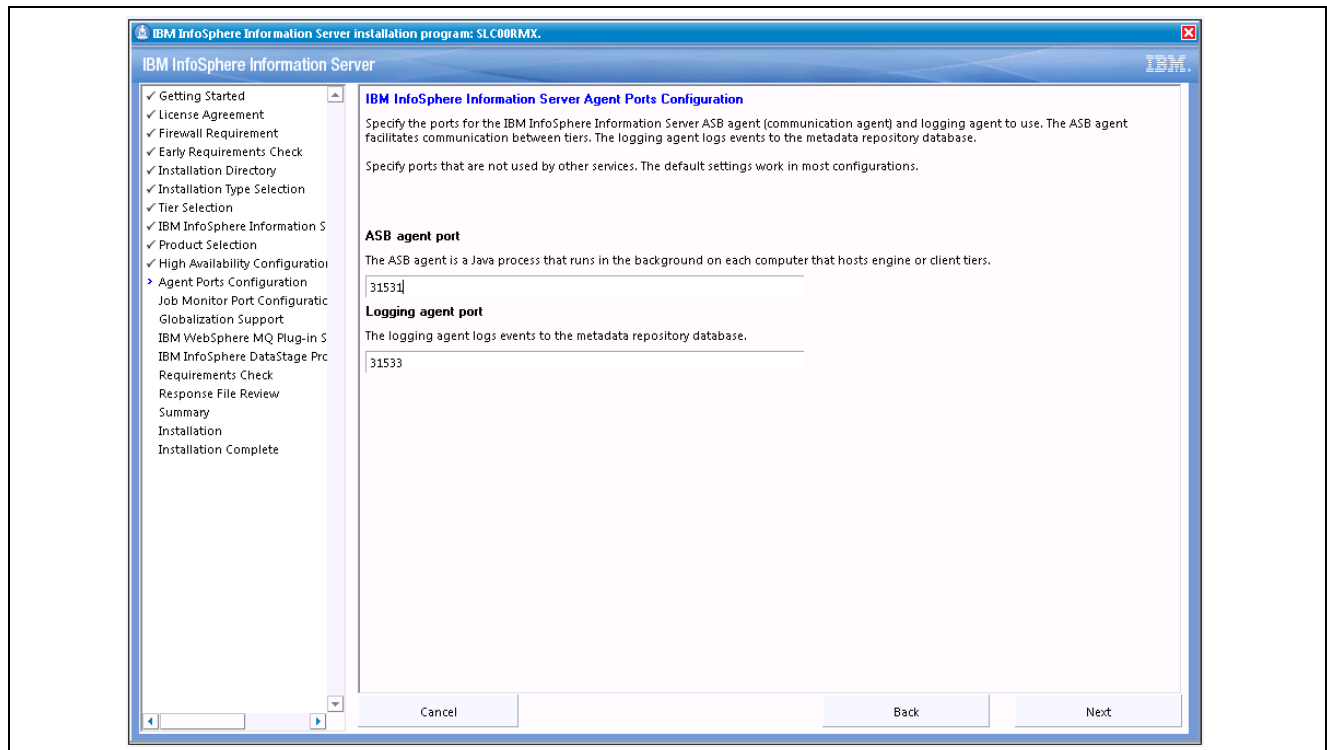
IBM InfoSphere Information Server Agent ports Configuration page

17. Specify the ABS agent port and Logging agent ports, and then click Next.

The Job Monitor Ports Configuration page appears, as shown in the following example:
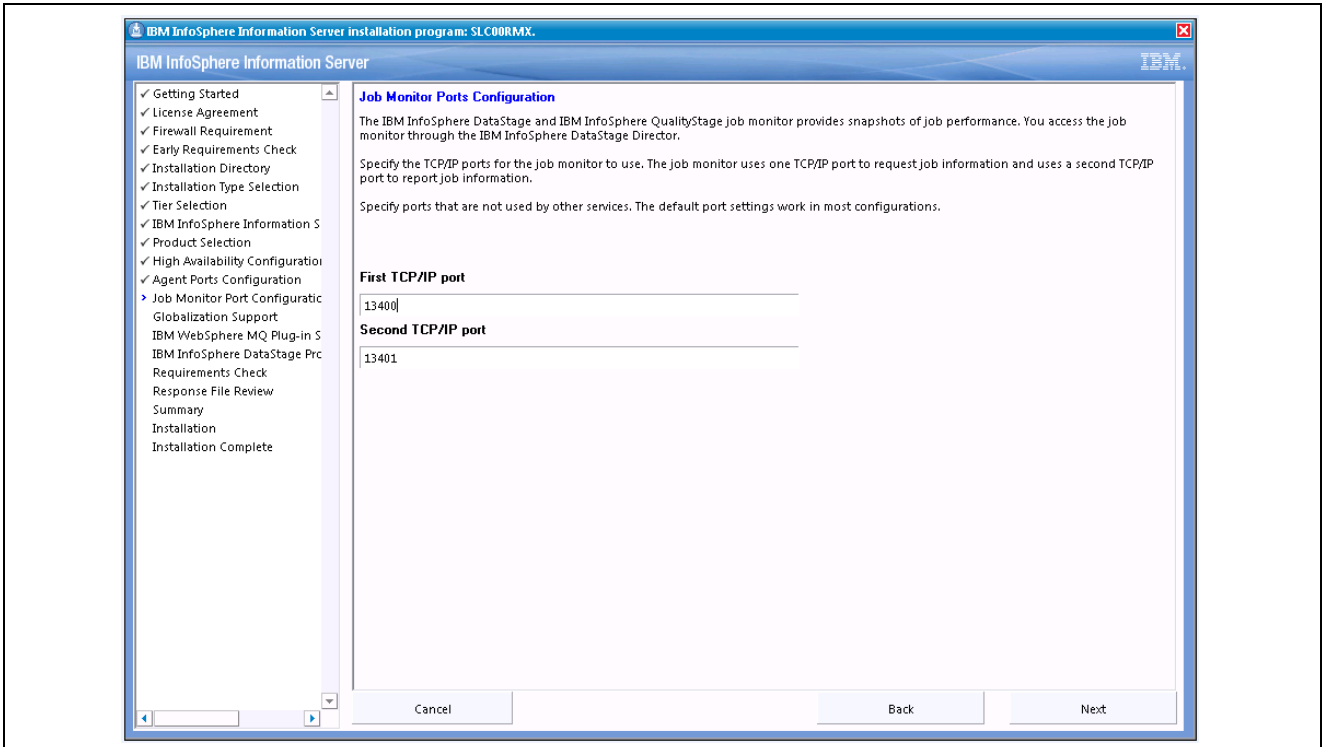
 Job Monitor Ports Configuration page

18. Specify the First TCP/IP port and the Second TCP/IP port for the Job Monitor, and then click Next.

The IBM InfoSphere DataStage and IBM InfoSphere QualityStage Globalization page appears, as shown in the following example:
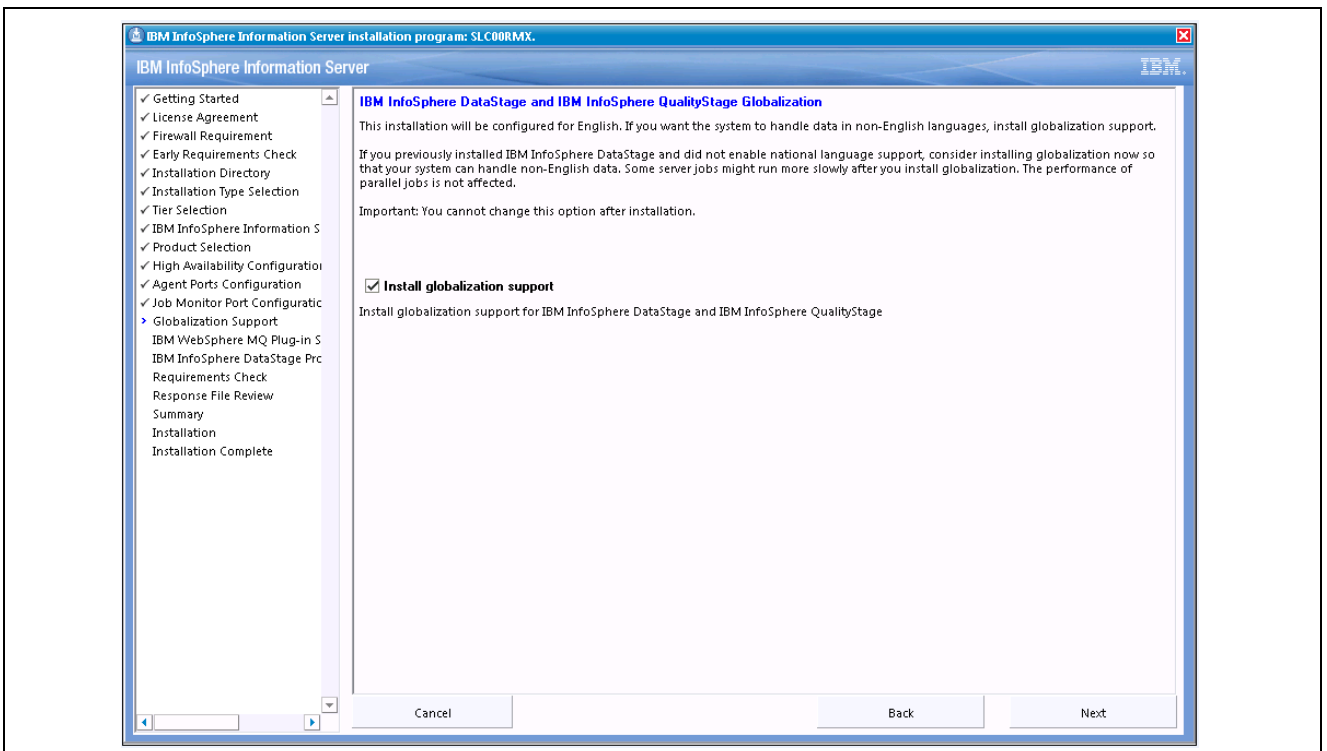
 IBM InfoSphere DataStage and IBM InfoSphere QualityStage Globalization page

19. Select the *Install globalization support* check box, to install globalization support for IBM InfoSphere DataStage and IBM InfoSphere QualityStage, and then click Next.

The IBM WebSphere MQ Plug-in Selection page appears, as shown in the following example:
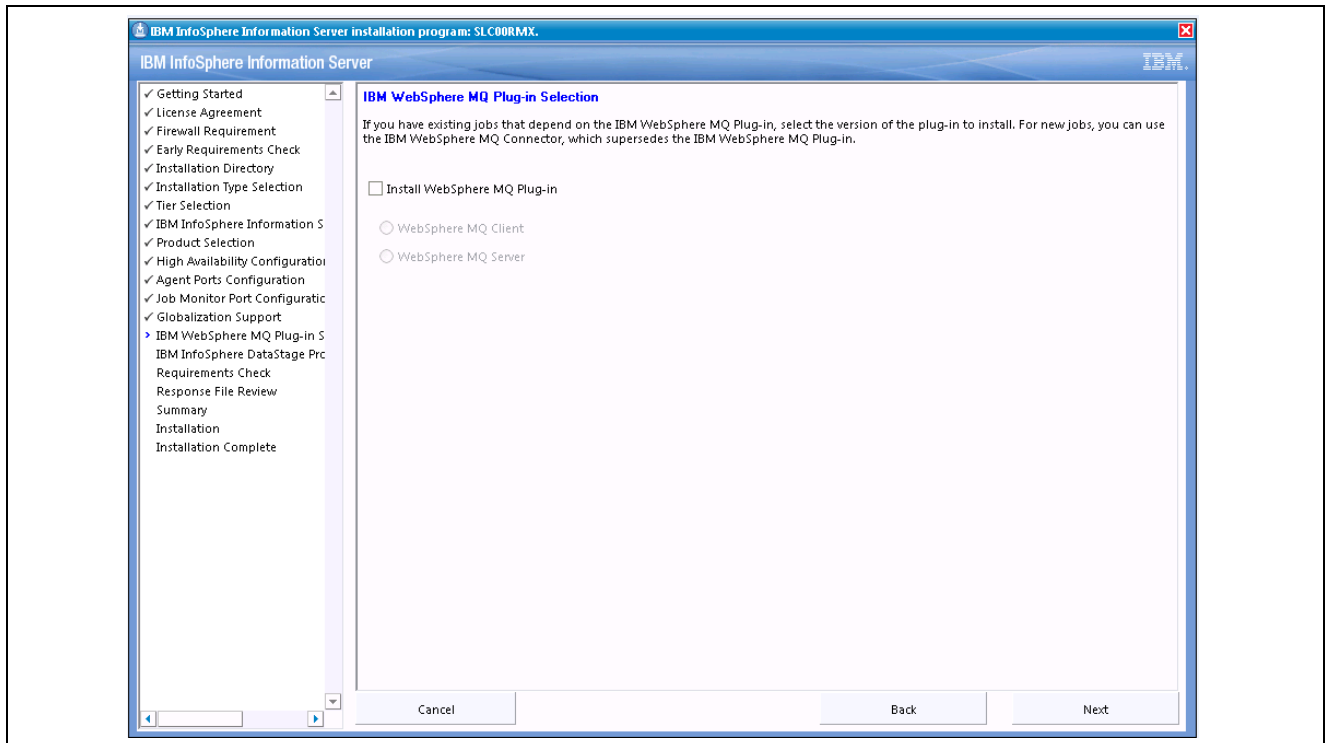
IBM WebSphere MQ Plug-in Selection page

20. Select the *Install WebSphere MQ Plug-in* check box , if you have existing jobs that depend on the IBM WebSphere MQ Plug-in, and then click Next.

The IBM InfoSphere DataStage Projects page appears, as shown in the following example:
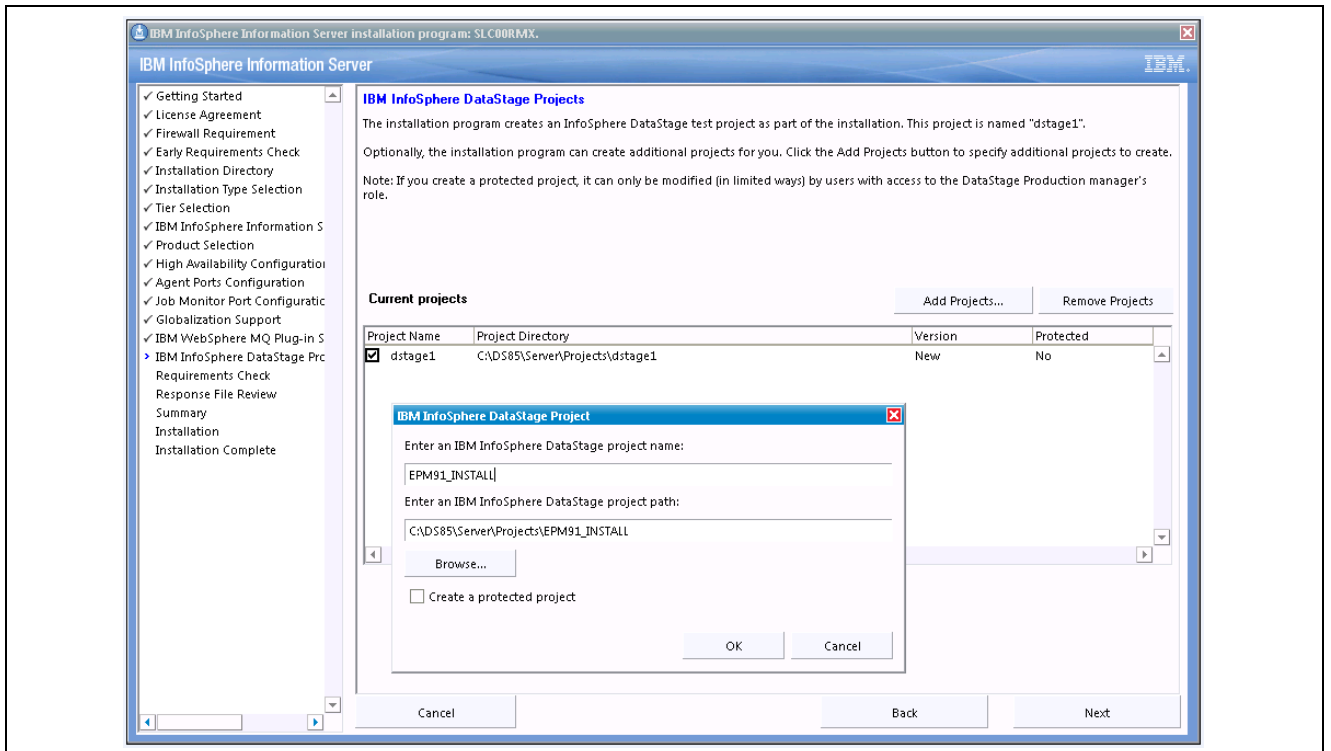
IBM InfoSphere DataStage Projects page

21. The installation program creates an InfoSphere DataStage test project as part of the installation and names the project *dstage1*.

    Optionally, the installation program can create additional projects for you. To create additional projects, click the Add Projects button and specify the additional projects to create.

22. Click Next.

    The System Requirements Check page appears, as shown in the following example:
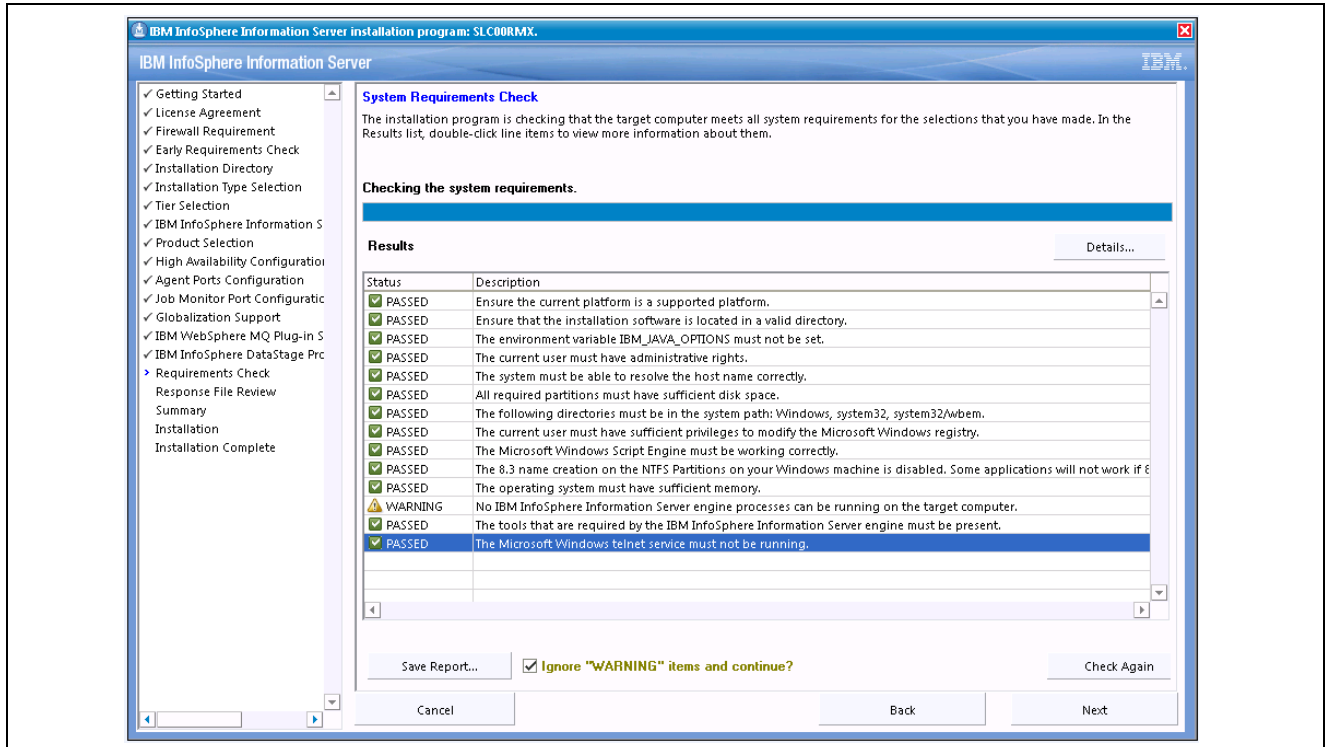
System Requirements Check page

23. Review the system requirements check and ensure that there are no errors, and then click Next.

   The Response File Review page appears, as shown in the following example:
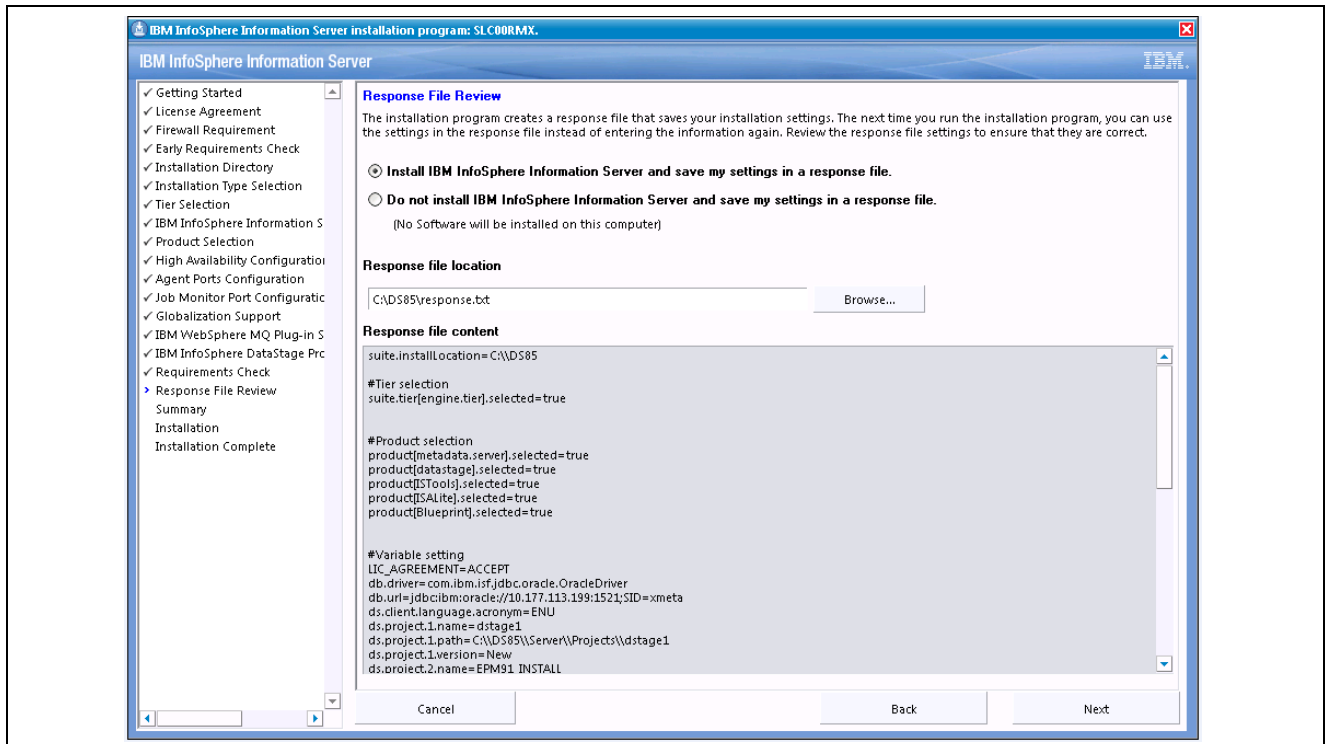
Response File Review page

24. On the Response File Review page, do one of the following:

- Select the option *Install IBM InfoSphere Information Server and save my settings in a response file*, to install the software and save the response file in a selected Response file location.

- Select the option *Do not install IBM InfoSphere Information Server and save my settings in a response file*, to save the response file in a selected Response file location (no software will be installed on this computer).

25. Click Next to continue.

The Preinstallation Summary for the Current Computer page appears, as shown in the following example:
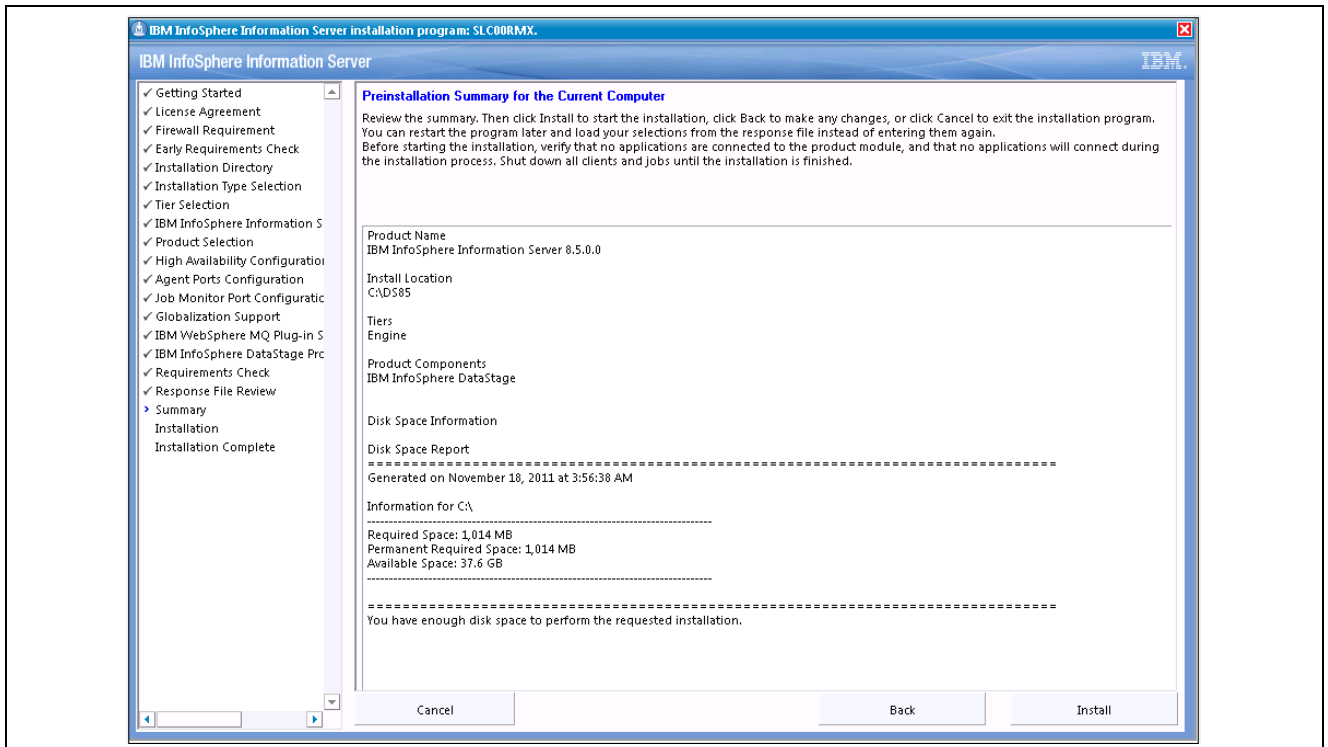
Preinstallation Summary for the Current Computer page

26. Review and verify the preinstallation summary details for the current computer, and then click the Install button to begin the installation.

After a successful installation, a zip file that contains installation log files is saved to the IBM InfoSphere Information Server installation directory. This file is named *isdump-operating_system-system_timestamp.zip*.

27. For *Microsoft Windows:* If you installed the client tier on Microsoft Windows, verify that Microsoft .NET Framework is at the correct version.

28. Repeat the process for each computer in your installation topology.

After completing the installation, start the IBM InfoSphere Information Server console and configure the required users.

29. If the installation fails, do the following:

a. View the installation logs for more information.

The ISInstall-timestamp.log file is available in the temporary directory.

b. Resolve any issues that are listed in the installation log file.

c. Remove the installation directory structure and the installation log file.

     d. For *Microsoft Windows:* Restart the computer.

     e. Run the installation program again.

Installing the FIX Pack

Install the fix pack1 update on the tiers in the following order:

1. Service Tier

2. Engine Tier

3. Client Tier

Note. You do not need to install the fix pack1 update on a computer that hosts only the metadata repository tier. If two or more tiers are on the same computer, the Update Installer installation automatically installs the update on all tiers on the computer in the appropriate order.

Preparing to install the fix pack1 update:

Download the following *fixpack1* update files from the Oracle Software Delivery Cloud portal (at https://edelivery.oracle.com):

•   i) Update Installer

•   ii) Patch package file

Installing a new version of the Update Installer before installing fix pack1:

Note. New versions of the Update Installer release periodically. You must install the latest version of the Update Installer to installation instances *before* you install fixes, fix packs, or updates.

To install a *new* version of the Update Installer on an installation instance *before* you install fix pack1:

1. Double-click the *updateImage.bat* file to run the script, after it extracts from the Update Installer zip file, as shown in the following example:
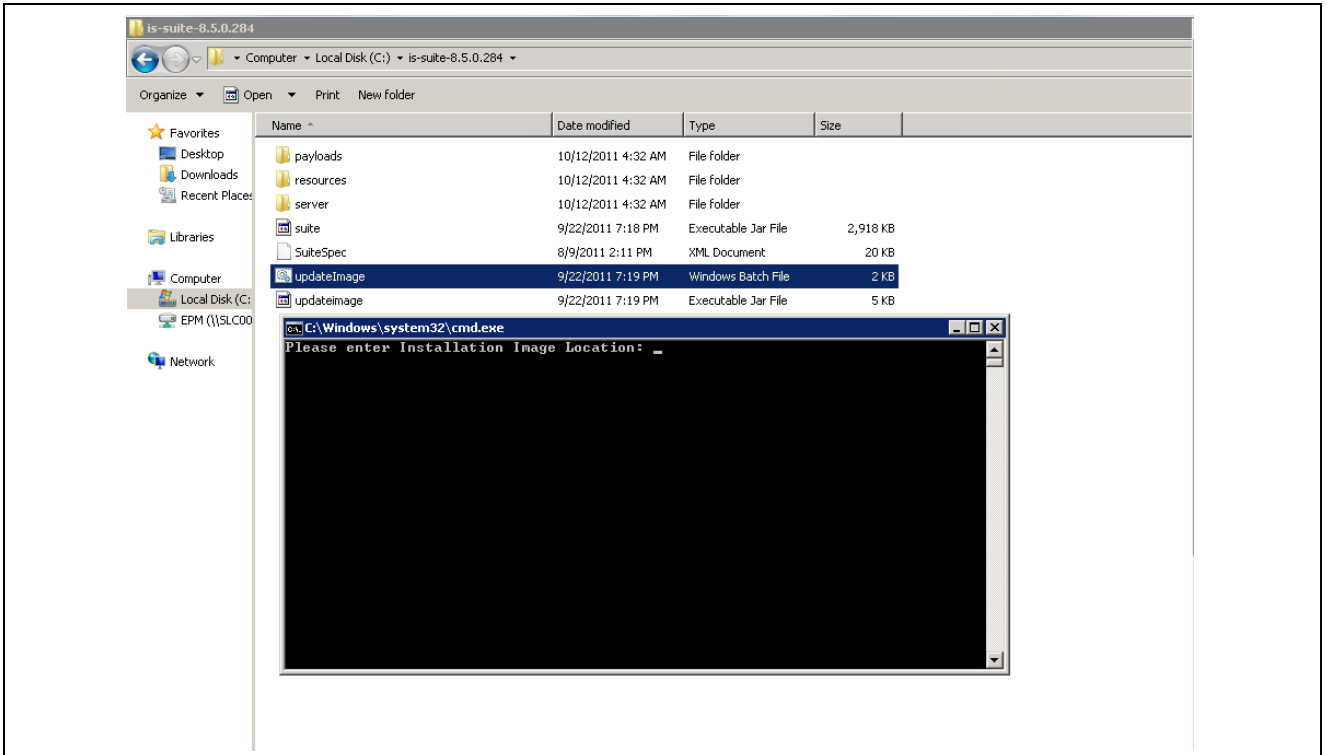
updateImage.bat file

2. When prompted for Image Location, enter the installation instance directory path as follows:

    < Installation instance directory >_uninstall
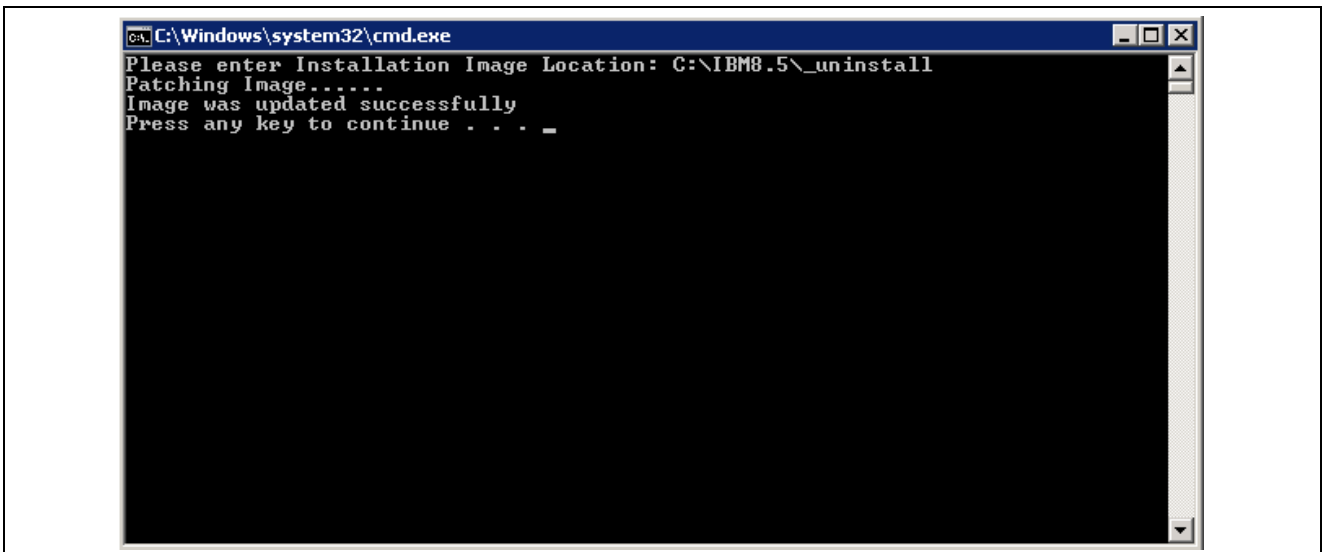
update successful

3. After the script runs successfully, the installation instance is updated with the new version of the Update Installer.

Installing the fix pack1 package file:

To install the fix pack1 package file:

1. Start the Update Installer program by double-clicking the *installUpdates.exe* file that is available under the following Installation instance directory, as shown in the following example:

   < Installation instance directory > \Updates\bin
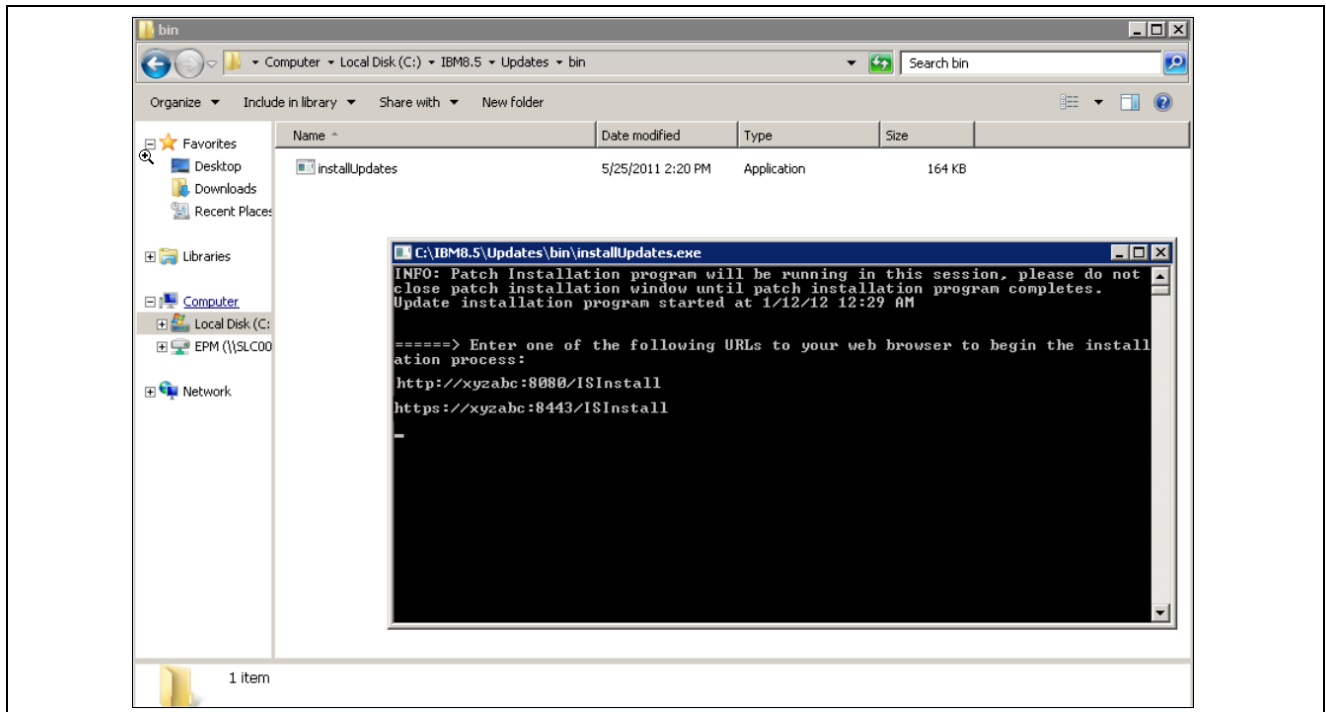
installUpdates.exe

2. The IBM InfoSphere Information Server installation program - Login page appears, as shown in the following example:
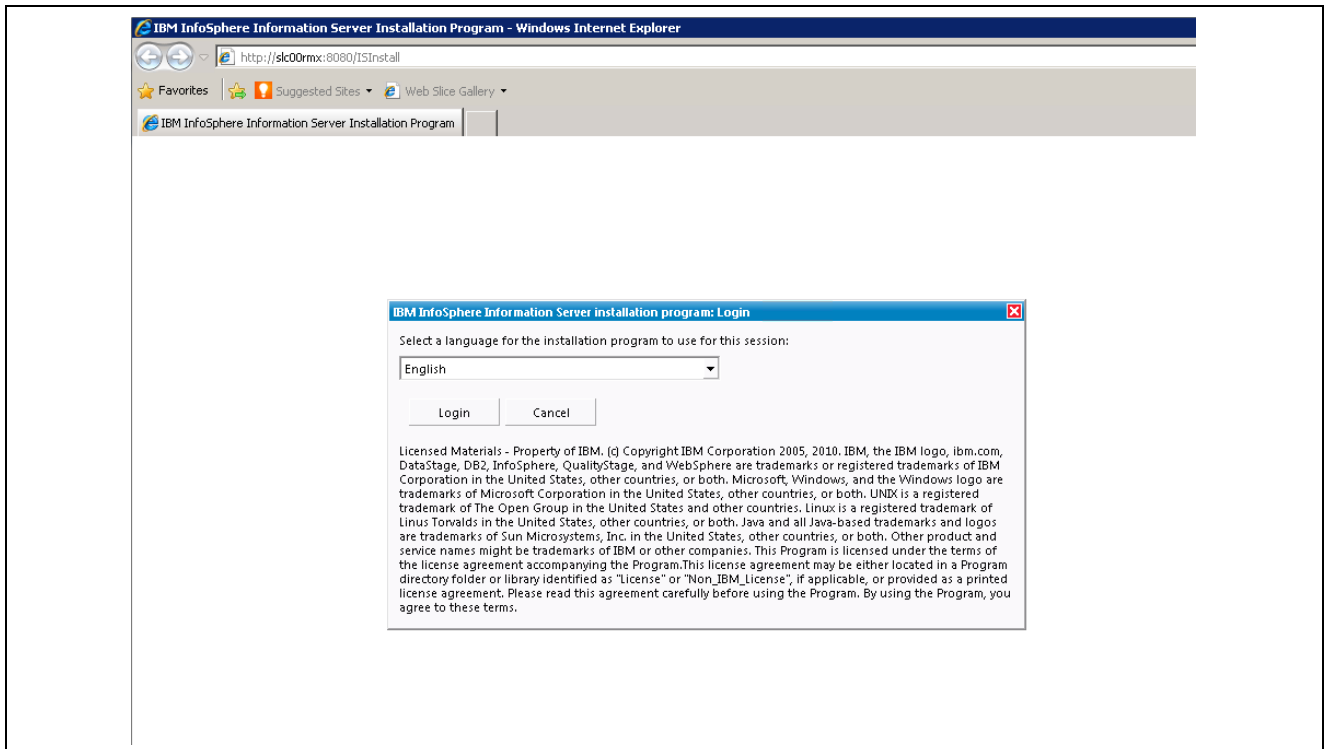
Login page

3. On the Login page, click the Login button to continue.

The IBM InfoSphere Information Server Getting Started page appears, as shown in the following example:
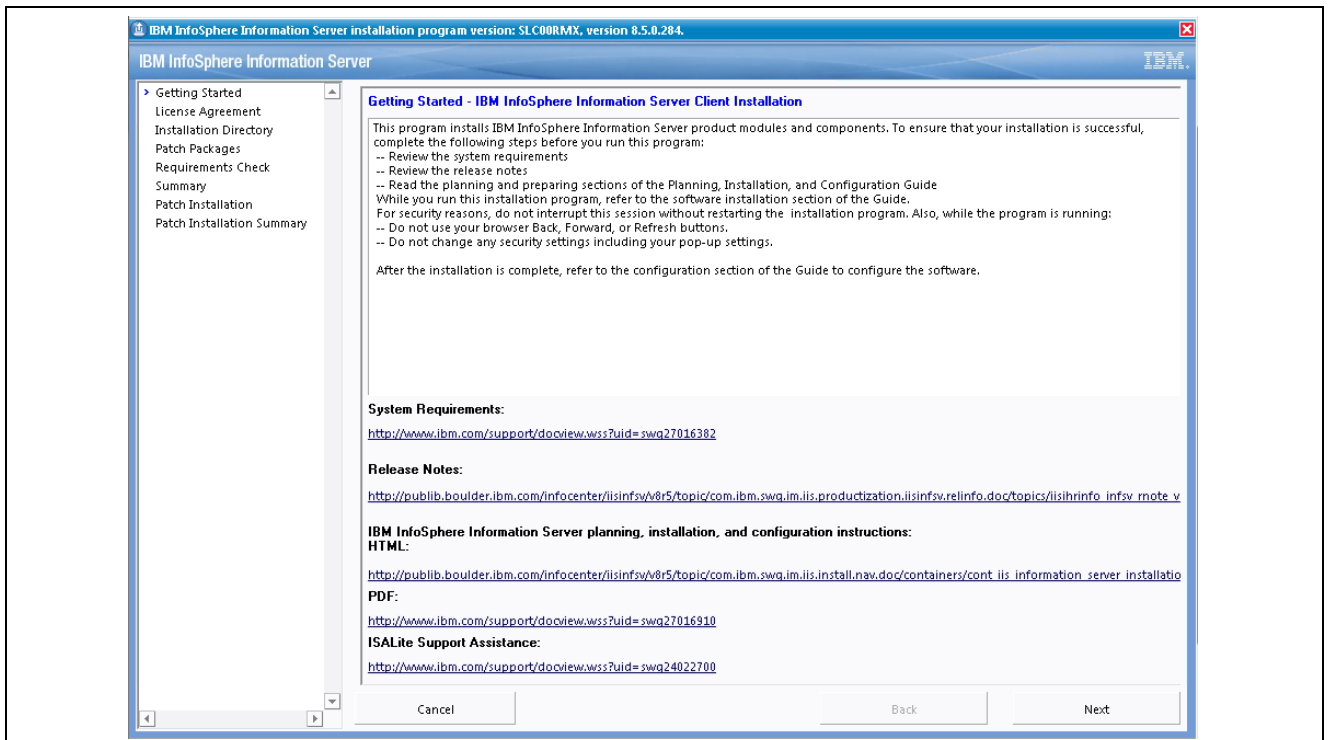
Getting Started page

4. On the Getting Started page, click Next to continue.

The License Agreement page appears, as shown in the following example:
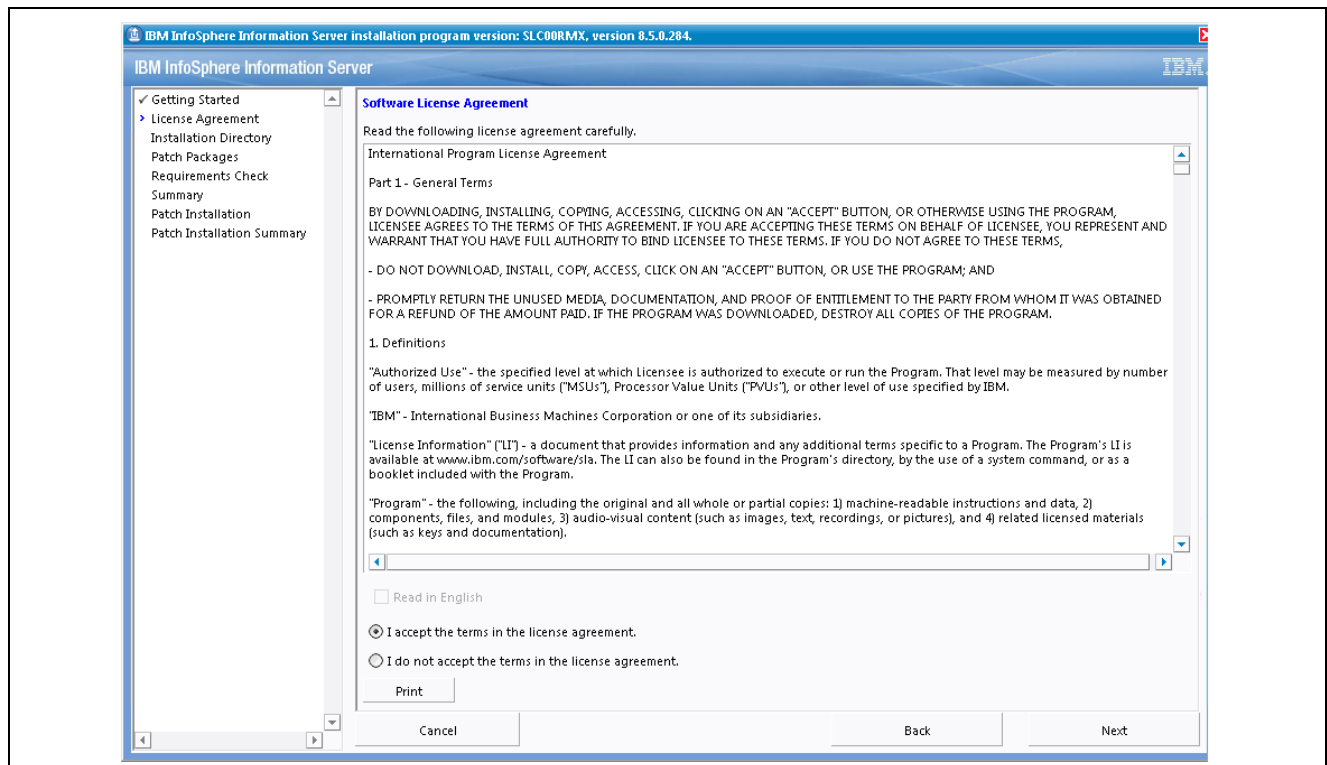
Software License Agreement page

5. On the Software License Agreement page, review and accept the terms in the license agreement, and then click Next button to continue.

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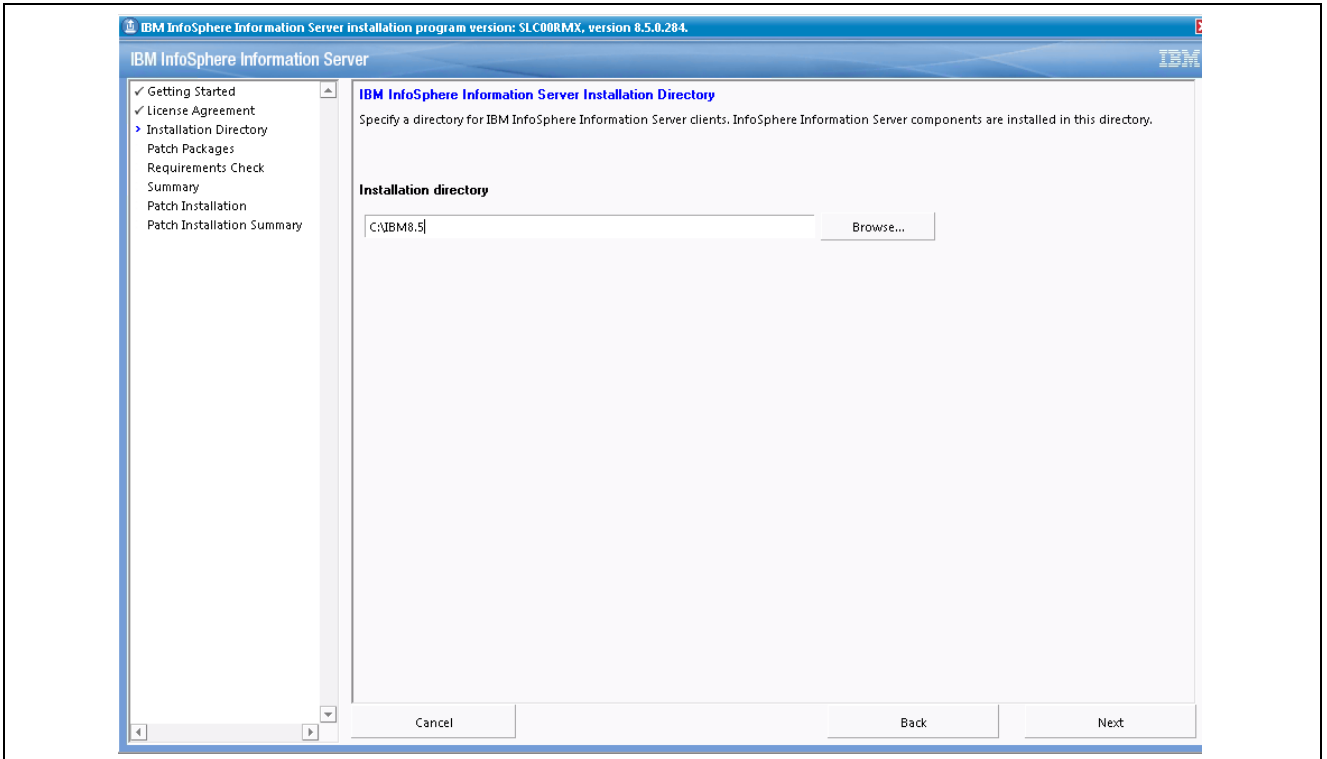
Installation Directory page

6. On the Installation Directory page, enter or browse to the IBM Data stage Installed instance directory to select, and then click Next.

    The Patch Packages page appears, as shown in the following example:
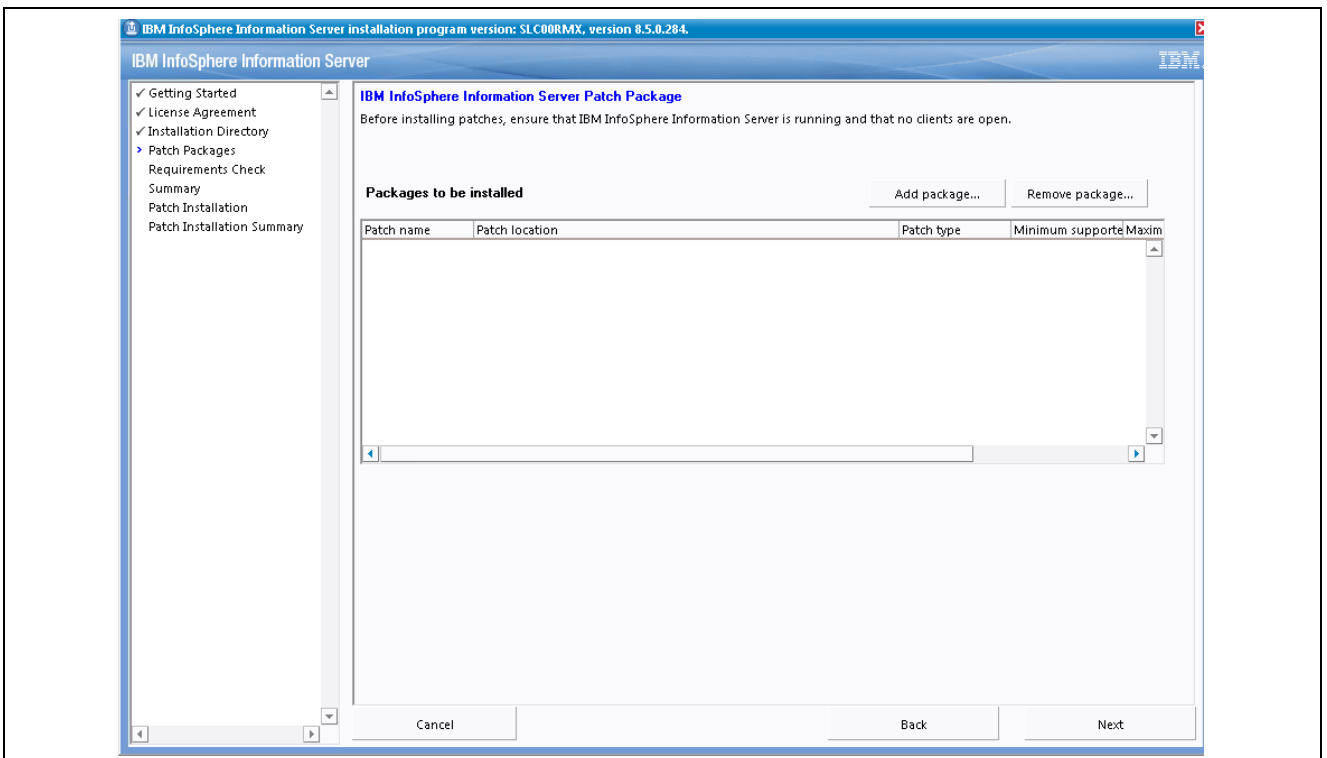
Patch Package page

7. On the Patch Packages page, click the Add Package button to add the *fix pack1Package* file to the installation program.

   The Select a Patch Package for Installation dialog box appears, as shown in the following example:
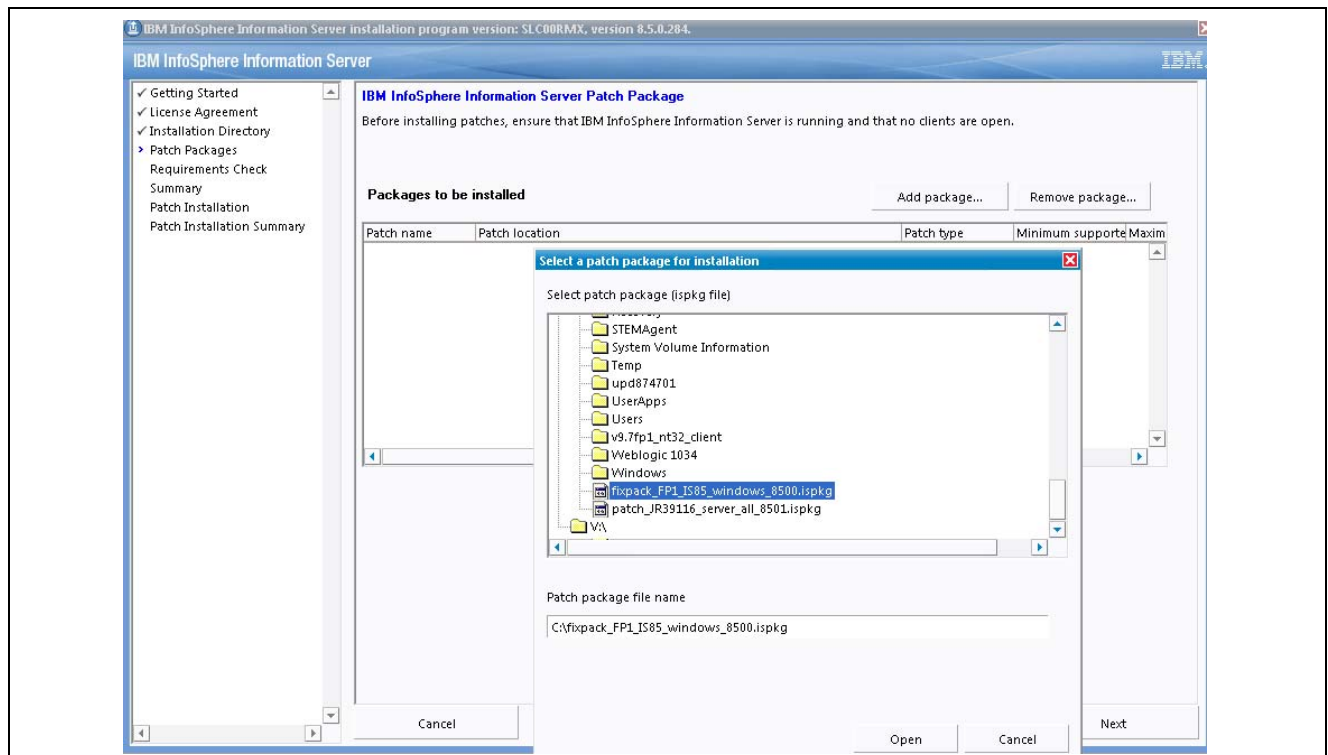
Select a patch package for installation dialog box

8. After you add the fixpack1 package, verify that it displays on the Patch Package page in the Packages to be installed section, as shown in the following example:
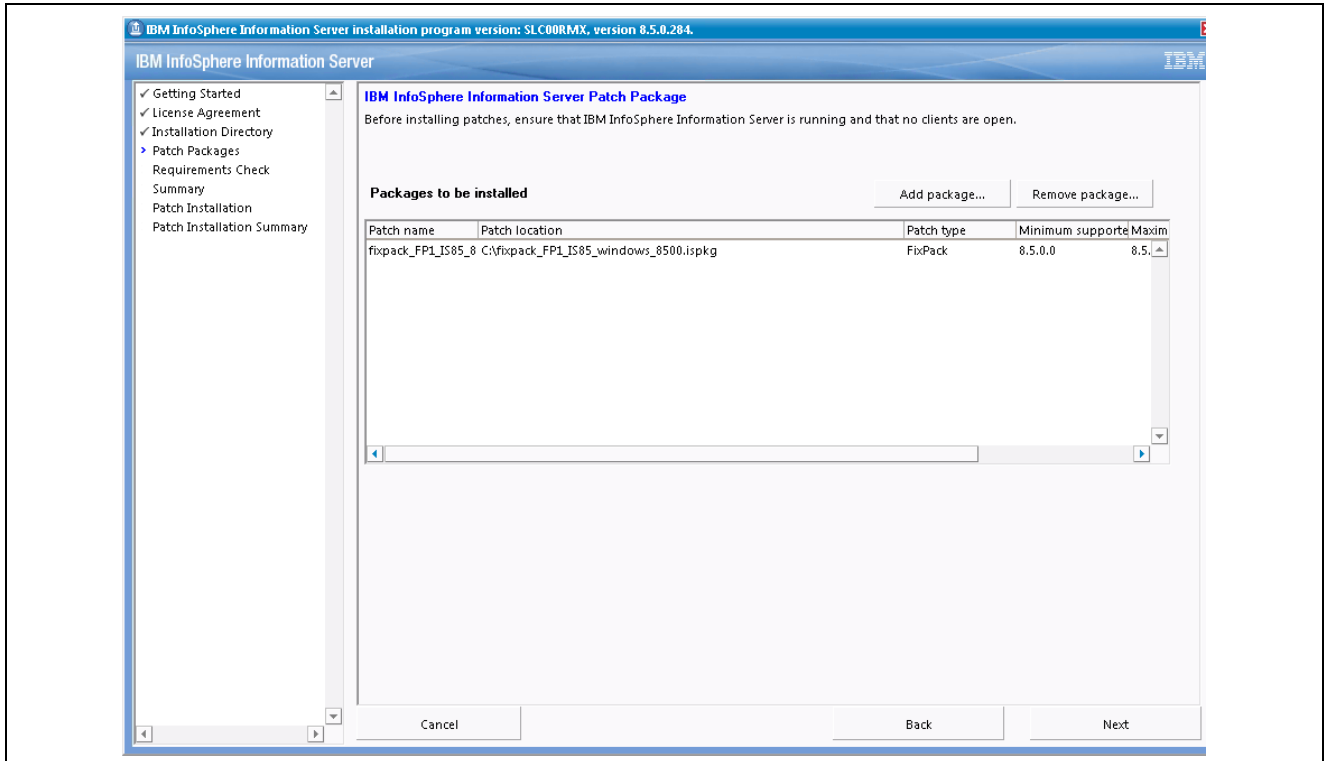
Patch Package page - showing the fixpack1 page under Packages to be installed

9. Click Next to continue. The System Requirements Check page appears, as shown in the following example:
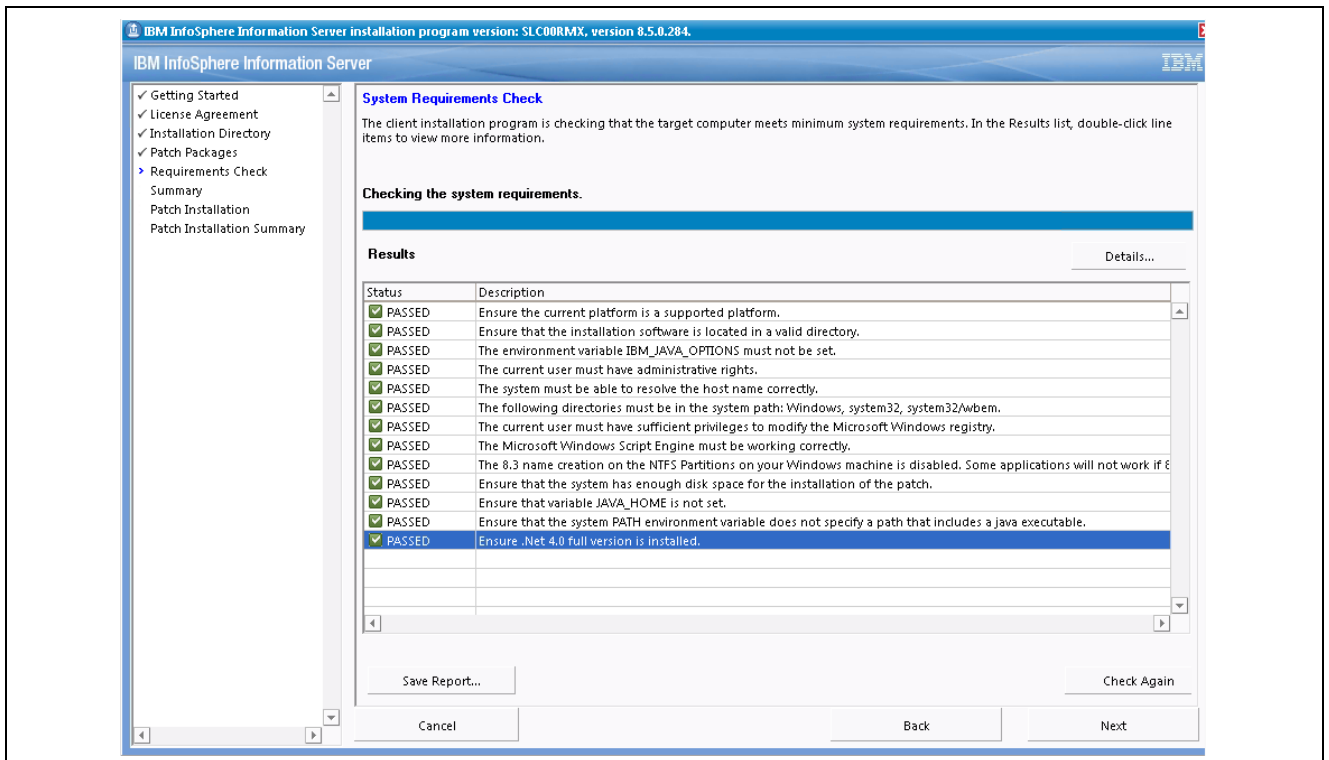
System Requirements Check page

10. On the System Requirements Check page, verify that all checks pass and then click Next.

The Preinstallation Summary for the Current Computer page appears, as shown in the following example:
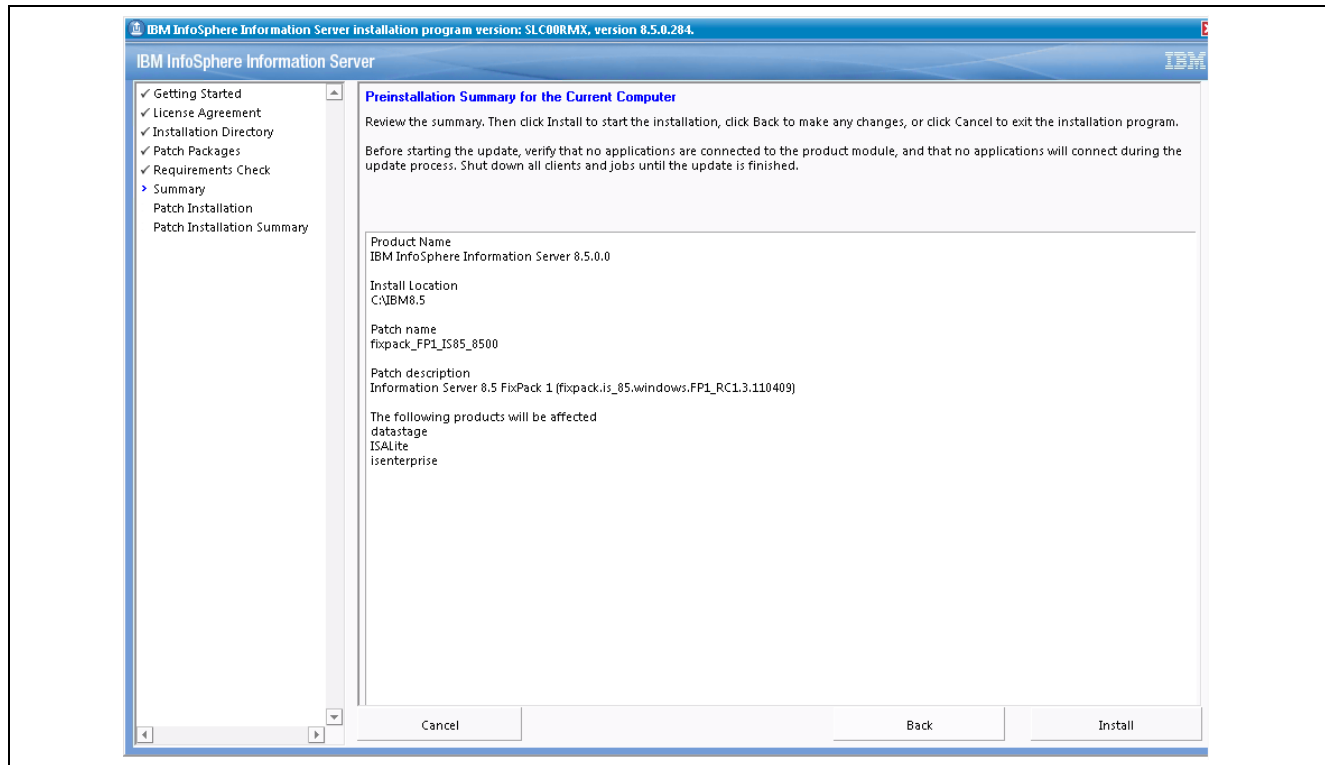
Preinstallation Summary for the Current Computer page

11. On the Preinstallation Summary for the Current Computer page, review the summary details and then click the Install button.

12. After the installation completes, review the Post update installation summary, and then click the Finish Button.

Note. In case the update installer program fails when installing fix pack1, restart the machine and try performing the installation again.

You can access the IBM InfoSphere Information Server 8.5 Fixpack1 installation instructions on the IBM web site at the following location:

http://www-01.ibm.com/support/docview.wss?uid=swg27016531&aid=1

You can use the instructions on the IBM web site to access the Update Installer to install fixes, fix packs, and updates to IBM InfoSphere™ Information Server and its product modules.

Note. The preceding access location is subject to change. In such cases, simply access the IBM web site and then search for the information you desire.

Installing Important Individual fixes on the Engine tier:

There are three important individual fixes available on the Oracle Software Delivery Cloud (at https://edelivery.oracle.com). These fixes should be applied on the Engine tier only *after* the successful installation of fix pack1.

Engine tier fixes are as follows:

JR38892-8.5.0.1

JR39116-8.5.0.1

JR39533-8.5.0.1

Refer to the Installing fix pack1 package file section to install individual patches on the Engine tier.

Note. In case the update installer program fails when installing these fixes, restart the machine and try performing the installation again.

Installing the Client tier Patch:

There is one individual fix posted on the Oracle Software Delivery Cloud (at https://edelivery.oracle.com) for the Client tier. This fix should be *only* be applied if you are experiencing the following issue.

Issue: MappingException being thrown during save of FastTrack generated job

JR39983 – 8.5.0.0

Note. In case the update installer program fails when installing these fixes, restart the machine and try performing the installation again.

Task 2-4: Configuring the IBM InfoSphere Information Server

This section discusses:

- Creating Users and Groups for the IBM InfoSphere Information Server
- Adding Library Locations to the dsenv File for Linux/UNIX
- Configuring IBM InfoSphere DataStage and QualityStage
- Testing the IBM InfoSphere QualityStage and DataStage Server Installation

To finish setting up the IBM InfoSphere Information Server, complete the tasks that correspond to the components you installed or the features that you want to enable. For additional set up steps, see the documentation for your specific product modules.

Task 2-4-1: Creating Users and Groups for the IBM InfoSphere Information Server

You must complete several tasks to set up users and groups for the suite.

The following list outlines, at a high level, the tasks that you do to set up the security for the IBM InfoSphere Information Server.

For information about users and security, see the *IBM InfoSphere Information Server Administration Guide*, Administration guide i46ieadm.pdf, that is included in your E-Delivery and also available on the IBM installation CD/DVD.

To create users and groups:

1. For the suite administrator (isadmin by default), set access levels for each product module by assigning security roles in the IBM Information Server console.

2. For the suite administrator, map credentials for your account in the IBM Information Server Web console.

3. *Optional:* Configure the user registry.

4. *Optional:* Create additional users and groups for the IBM InfoSphere Information Server.

5. *Optional:* Control access levels by assigning security roles.

6. *Optional:* Map the credentials for the users.

Note. For further details on creating user groups and security, see the *IBM InfoSphere Information Server Administration Guide*, Administrator guide i46ieadm.pdf, that is included in your E-Delivery and also available on the IBM installation CD/DVD.

Task 2-4-2: Adding Library Locations to the dsenv File for Linux/UNIX

The *dsenv* file contains a series of shell arguments that are referenced when the engine starts. Interactive users, other programs, and scripts can reference the *dsenv* file. For some ODBC connections, plug-ins, and connectors, and for interactions with external applications, such as WebSphere MQ, you must edit the *dsenv* file to include the location of the shared libraries for the software.

Important! You must be logged in as an IBM InfoSphere DataStage administrator with the operating system credentials on the server for the InfoSphere DataStage administrator.

To add library locations to the *dsenv* file:

1. Consult the documentation of the plug-in, connector, or external application for its library path location.

2. Edit the dsenv file located in the $DSHOME/DSEngine directory, and add the location to the library path variable.

    The following table lists the operating system and corresponding library path environment variable:

Operating System	Library Path Environment Variable
IBM AIX	LIBPATH
HP-UX	SHLIB_PATH
HP-UX on Intel® Itanium®	LD_LIBRARY_PATH
Linux	LD_LIBRARY_PATH
Sun Solaris	LD_LIBRARY_PATH

3. Restart the engine.

Task 2-4-3: Configuring IBM InfoSphere DataStage and QualityStage

Before you use IBM InfoSphere DataStage and InfoSphere QualityStage, you must perform several configuration tasks.

The following list outlines, at a high level, the tasks that you initially perform to configure and administer this product module. For information about users and security, see the *IBM InfoSphere Information Server Administration Guide*, Administration guide i461eadm.pdf, that is included in your E-Delivery and also available on the IBM installation CD/DVD.

To complete the configuration tasks:

1. Use the IBM InfoSphere Information Server Web console to create users and groups and assign administrator and user roles.

2. If the operating system where the engine tier is installed does not use the same user registry as IBM InfoSphere Information Server (default mode), create credential mappings.

3. Assign user roles and project roles and give project access privileges to users.

Task 2-4-4: Testing the IBM InfoSphere QualityStage and DataStage Server Installation

After you install and configure IBM InfoSphere DataStage and QualityStage, test the installation by logging in to the Administrator and Designer clients.

Before you begin, ensure that you meet the following requirements:

To run these tests, especially to connect to the IBM DataStage Designer client, you must be an IBM DataStage administrator or a lower-level user with specific project access granted by an administrator (in the Administrator client). Therefore, it is recommended that any tests be carried out by an IBM DataStage administrator. If you plan to use credential mapping, then the credential mapping must be set up.

To test the installation:

1. Start the IBM InfoSphere DataStage and QualityStage Administrator client:

    a. On the computer where you installed the Administrator client, from your Start menu, select All Programs, IBM Information Server, IBM InfoSphere DataStage and QualityStage Administrator. Or, if you selected *Create desktop icons*, when installing, click the desktop icon.

    b. Use your suite credentials to log in to the Administrator client.

    c. When you are prompted for the server where the services tier is installed, type server_name:port_number in the Domain field. For example, if you installed the services tier (domain) on the xyz server and the default port number was used, type xyz:9080 as the server.

    d. Type the engine server name in the IBM DataStage server field.

2. Start the InfoSphere DataStage and QualityStage Designer client:

    a. On the computer where you installed the Designer client, from your Start menu, select All Programs, IBM Information Server, IBM InfoSphere DataStage and QualityStage Designer.

    b. Use your suite credentials to log in to the Designer client.

    c. When you are prompted for the server where the services tier is installed, type server_name:port_number in the Domain field. For example, if you installed the services tier (domain) on the xyz server and the default port number was used, type xyz:9080 as the server.

    d. When you are prompted for the server and project, type server_name/project_name in the Project field. For example, if the engine is installed on the xyz server and the project is named my-project, type xyz/my-project.

Task 2-5: Configuring Access to ODBC Data Sources

This section discusses:

- Understanding Configuring Access to ODBC Data Sources

- Setting the Library Path in the dsenv File

- Configuring the odbc.ini File

- Specifying Data Source Names in the uvodbc.config File

- Creating and Binding a DB2 Package to a Data Source Name

- Testing ODBC Driver Connectivity

Understanding Configuring Access to ODBC Data Sources

You can configure ODBC access on Microsoft Windows, Linux, and UNIX operating systems.

On Linux and UNIX, you edit the *dsenv*, *odbc.ini*, and *uvodbc.config* files to set up access to ODBC data sources. The files are in the *$DSHOME* directory. A copy of the *uvodbc.config* file is also placed in each project directory. Non-wire protocol drivers require different set up information from wire drivers. Non-wire drivers require information about the location of the database client software. Wire protocol drivers require information about the database itself.

In the *uvodbc.config* file, comment lines begin with a number sign (#). Add your comments only to the comment block that is at the top of the file. Comments that are not in the comment block can cause processing errors.

For information about configuring the ODBC environment for a specific database, see the DataDirect Connect and Connect XE for ODBC Reference manual (a PDF file) in the *$DSHOME/Server/branded_odbc/books/odbc* directory. Also review the *odbcread.me* file in the *branded_odbc* directory and an HTML file in the *branded_odbc/odbchelp* directory.

On Microsoft Windows, if you installed ODBC drivers, you must configure the drivers to access ODBC data sources. See the documentation for your ODBC driver vendor for information about how to configure the driver.

Task 2-5-1: Setting the Library Path in the dsenv File

For Linux or UNIX: The IBM InfoSphere Information Server engine has a centralized file for storing environment variables called *dsenv* in *$DSHOME*. $DSHOME identifies the IBM InfoSphere DataStage installation directory. The default directory is */opt/IBM/InformationServer/Server/DSEngine*.

You may need to add new environment variables as you configure IBM InfoSphere DataStage to connect to different databases by using ODBC drivers and the database APIs. Any environment variables you need for interactive use of ODBC drivers to make a connection to an ODBC data source must be added to the *dsenv* file. This allows the IBM InfoSphere DataStage server to inherit the proper environment for ODBC connections.

For a connection that uses a wire protocol driver, there are no changes required to the *dsenv* file.

To set the library path for a connection that uses a non-wire protocol driver:

1. Specify the following information in the *dsenv* file:

    - Environment variables for the database client software.

    - Database home location.

• Database library directory.

The following table contains the names of the library path environment variable, by operating system:

Operating System	Library Path Environment Variable
IBM AIX	LIBPATH
HP-UX	SHLIB_PATH
HP-UX on Intel® Itanium®	LD_LIBRARY_PATH
Linux	LD_LIBRARY_PATH
Sun Solaris	LD_LIBRARY_PATH

The following examples show typical entries for commonly used databases. The entries vary slightly depending on your operating system. For more information, see the documentation that is provided with your data source product.

Oracle 9i

```
ORACLE_HOME=/space/oracle9i
LD_LIBRARY_PATH=$LD_LIBRARY_PATH:$ORACLE_HOME/lib:$ORACLE_HOME/rdbms/lib
export LD_LIBRARY_PATH
ORACLE_SID=WSMK5
export ORACLE_HOME ORACLE_SID
```

2. Stop and restart the IBM InfoSphere DataStage server whenever you edit *dsenv*.

Task 2-5-2: Configuring the odbc.ini File

For Linux or UNIX: The *odbc.ini* file must provide information about connecting to all of the databases and database client applications that you use. The */opt/IBM/InformationServer/branded_odbc/IBM_Tools* directory contains example *odbc.ini* files for each supported Linux and UNIX platform. Use the contents of these files to create the *.odbc.ini* file for the *$DSHOME* directory.

Task 2-5-3: Specifying Data Source Names in the uvodbc.config File

For Linux or UNIX: The *uvodbc.config* file must specify the ODBC data source name (DSN) for each database.

A copy of the *uvodbc.config* file is also in each project directory. For example, the default path for projects on Linux is */opt/IBM/WDIS/Server/Projects*. These copies are useful where you configure data sources that are known to some projects but not others. By default, IBM InfoSphere DataStage searches the current project directory for a *uvodbc.config* file and, if it finds one, uses this file instead of *$DSHOME*.

To specify data source names:

1. Use this syntax to add entries to the *uvodbc.config* file:

<DSN_name>

DBMSTYPE = ODBC

Where DSN_name is the ODBC DSN. This name must be the same name that is specified in the *odbc.ini* file. The space on each side of the equal sign is required.

In the *uvodbc.config* file, comment lines begin with a number sign (#). Comments that are not in the comment block at the top of the file cause processing errors. Add comments only to the comment block that is at the top of the *uvodbc.config* file.

The following example shows a typical *uvodbc.config* file:

```
[ODBC DATA SOURCES]
<localuv>
DBMSTYPE = UNIVERSE
network = TCP/IP
service = uvserver
host = 127.0.0.1

<Oracle8>
DBMSTYPE = ODBC
<DB2>
DBMSTYPE = ODBC
```

2. If you alter *uvodbc.config* after creating projects, copy the edited file to the project directories.

Task 2-5-4: Creating and Binding a DB2 Package to a Data Source Name

For Linux or UNIX: To use a DB2 package, you must bind it to each DB2 data source name (DSN).

To create and bind a package to a data source name:

1. Open a terminal window, and change to the $DSHOME/../branded_odbc/bin directory.

2. Enter this command:

   ```
   bind22 dsn
   ```

   Where dsn is the ODBC data source name.

3. Specify your user ID and password, if you are prompted to provide them.

Task 2-5-5: Testing ODBC Driver Connectivity

For Linux or UNIX: After you configure ODBC connectivity, test the configuration to verify your connection to the data source.

To test the connectivity of the ODBC connections that you defined for IBM InfoSphere DataStage:

1. Change directories to $DSHOME and set up the environment by running the following command:

   ```
   . ./dsenv
   ```

2. Enter this command to start the IBM InfoSphere DataStage server shell:

   ```
   ./bin/dssh
   ```

3. Enter this command to log in to the project:

LOGTO project_name

Where project_name is case-sensitive.

4. Enter this command to obtain a list of available data source names:

DS_CONNECT

5. Enter this command to test the connection:

DS_CONNECT dsn

Where dsn is the data source name of the connection to test.

6. Enter your user name and password to connect to the specified database.

7. Enter .Q to quit the connection.

Task 2-6: Stopping and Starting the IBM InfoSphere DataStage Server

You must stop and then restart the IBM InfoSphere Information Server engine after you complete certain tasks, such as editing the *dsenv* file on Linux or UNIX, modifying the *uvconfig* file, or completing the installation of a tier.

To stop and start the server engine on Linux or UNIX:

1. Log in as the root user or the IBM InfoSphere DataStage administrator (typically *dsadm*).

2. Change to the engine directory and set the environment.

```
cd $DSHOME
. ./dsenv
```

$DSHOME is the name of the engine directory. The default directory is */opt/IBM/InformationServer /Server/DSEngine*.

3. Stop the engine.

```
./bin/uv -admin -stop
```

The command displays a message when the engine stops.

4. Restart the engine.

```
./bin/uv -admin -start
```

To stop and start the server engine on Microsoft Windows:

1. In the Microsoft Windows control panel, open the IBM InfoSphere DataStage Control Panel.

2. Click Stop all services.

3. Wait until all of the services have stopped.

4. Click Start all services.

Task 2-7: Creating the IBM InfoSphere DataStage Projects

To create a project:

1. In the IBM InfoSphere DataStage Administrator client, select Start, Programs, IBM Information Server, IBM InfoSphere DataStage and QualityStage Administrator.

    The IBM InfoSphere DataStage and QualityStage Login/Attach to DataStage page appears, as shown in the following example:
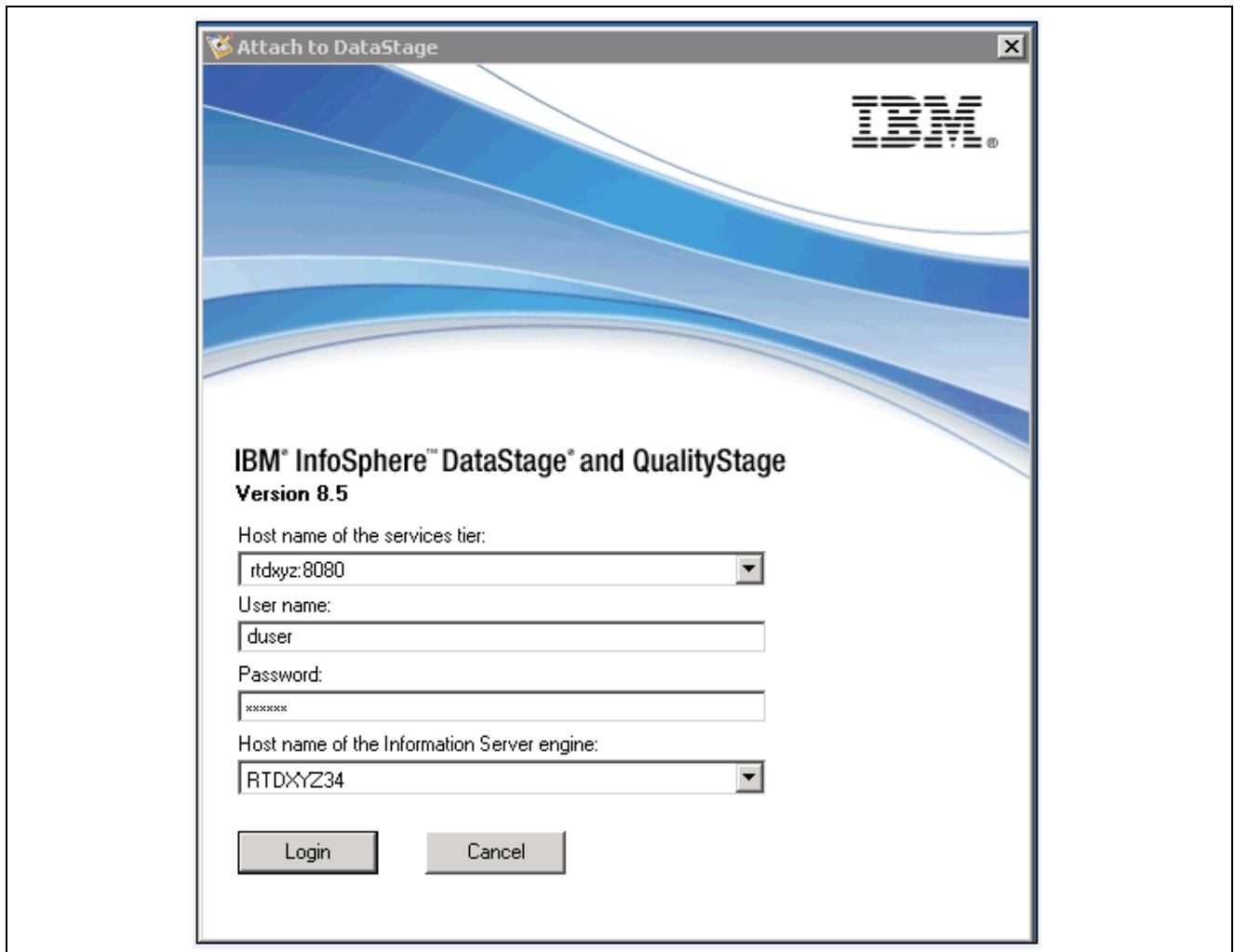
IBM InfoSphere DataStage Administrator - Login/Attach to DataStage page

2. In the Attach to DataStage dialog box, enter the following information:

    - In the Domain field, enter the name of the domain server machine.

    - In the User name field, enter the user name that is required to log on to the machine on which the domain server is installed.

      If the server is running on a Microsoft Windows platform, the user name is the Microsoft Windows login.

      If the server is running on a UNIX platform, the user name is the Administrator user that was used during the installation.

3. In the Password field, enter the password that is required to log on to the machine on which the domain server is installed.

4. In the DataStage server drop-down list box, select the name of the server machine where the DataStage engine is installed.

5. Click the OK button.

6. Click the Projects tab to view a list of projects that are available on the server, as shown in the following example:
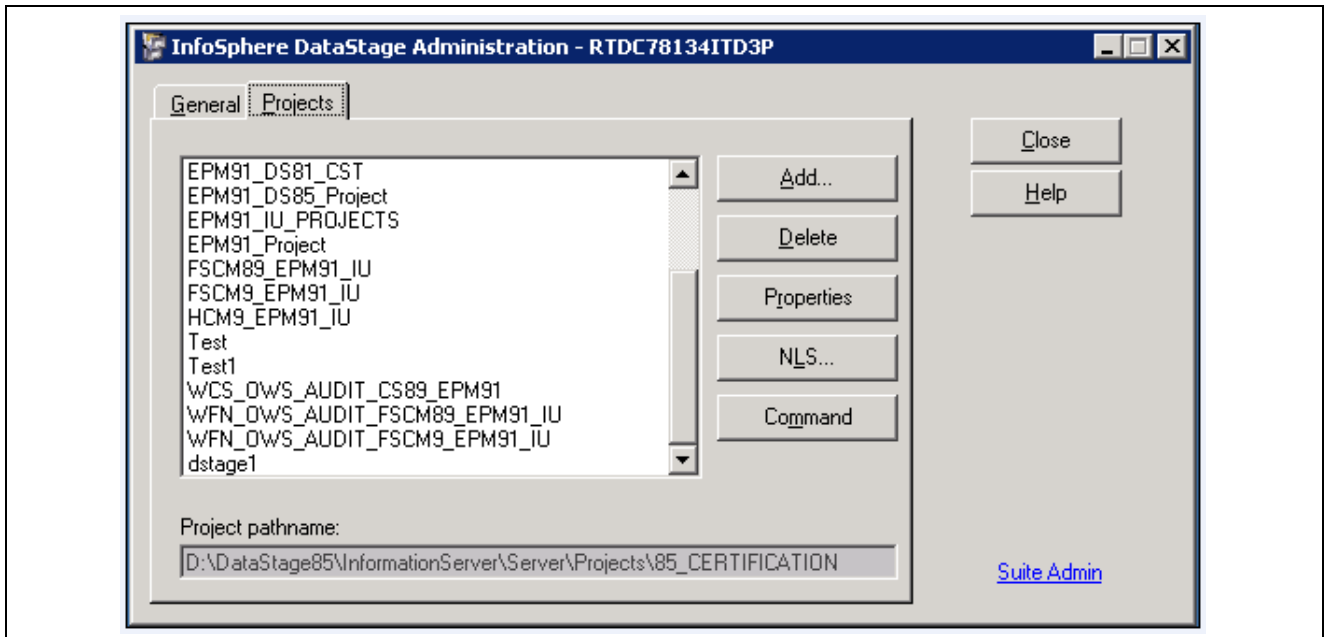
IBM InfoSphere DataStage Administrator - Projects tab

7. Click the Add button to access the Add Project dialog box, as shown in the following example:
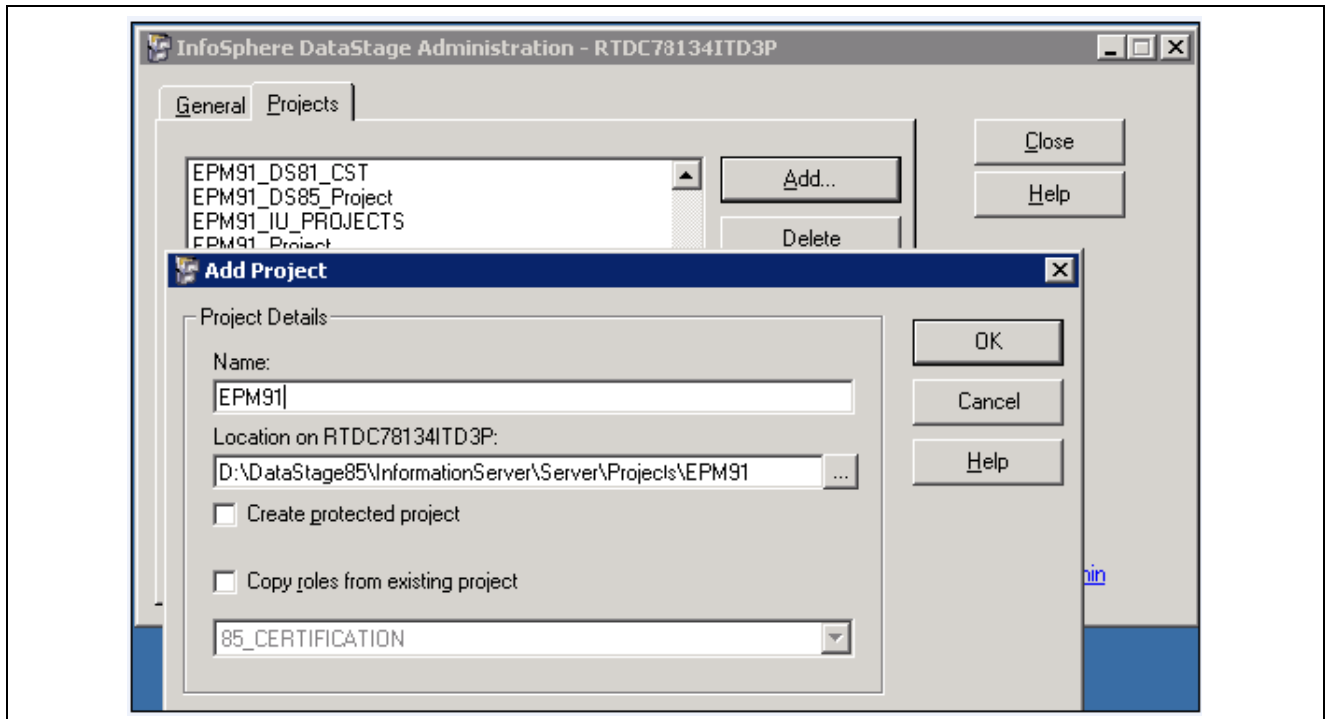
IBM InfoSphere DataStage Administrator - Add Project dialog box

8. In the Add Project dialog box, enter the following:

    • In the Name field, enter the project name. You can specify your own naming convention in this field.

    Note. The project name is case-sensitive and cannot be changed after you import the .dsx files. If you want to update or change the project, you only have the option to create a new project and import the .dsx files again. The IBM InfoSphere DataStage Administrator automatically appends the project to the default location for a new project.

    • In the Location on ... field, click the Browse button to select another location (if the default location is not desirable due to disk space constraints).

    • Do *not* select the Create protected project check box, as selecting this option creates a read-only project.

9. Click the OK button to create the project on the server.

    This creates an empty project on the IBM InfoSphere DataStage server. The updated list of projects displays after copying completes.

10. Repeat steps 5 through 7 to create any additional projects.

For more details on how to create IBM InfoSphere DataStage projects for PeopleSoft EPM:

See *PeopleSoft Enterprise Performance Management 9.1 Fundamentals,* "Setting Up DataStage for EPM: Setting Up DataStage Projects."

Task 2-8: Configuring Environmental Parameters

This section discusses:

• Understanding Configuring Environmental Parameters

• Importing the EPM91_DSPARAMS.env File

• Retaining IBM Infosphere Datastage 8.1 Project Parameters with Corresponding Values for IBM Infosphere Datastage 8.5

Understanding Configuring Environmental Parameters

This section discusses how to move the environmental parameters from IBM InfoSphere DataStage 8.1 Project to IBM InfoSphere Datastage 8.5 Project. You must configure default environmental parameters for each project you are using, as every job uses a subset of the environmental variables.

You can accomplish this process using either of the methods that follow. Review these sub tasks to determine which method is best for you.

Task 2-8-1: Importing the EPM91_DSPARAMS.env File

All environment parameters used in PeopleSoft EPM 9.1 are available with empty values in EPM91_DSPARAMS.env file. IBM InfoSphere DataStage 8.5 with fixpack1 (8.5.0.1) contains a feature to import the environment parameters from the IBM InfoSphere DataStage Administrator client.

You can use the following steps to copy environment parameters from the EPM91_DSPARAMS.env file to the IBM InfoSphere DataStage 8.5 project.

The EPM91_DSPARAMS.env file is available as *EPM91_DSPARAMS.zip* on the code tree. Extract the EPM91_DSPARAMS.zip file before you perform the import steps that follow.

To import the EPM91_DSPARAMS.env file:

1. Locate the EPM91_DSPARAMS.env file (EPM91_DSPARAMS.zip) using the following path on the code tree:

   <PSHOME>\SRC\ETL

   Note. In a decoupled environment, this file is located in <PS_APP_HOME>\SRC\ETL.

   If you do not have a decoupled environment, this file is located in <PS_HOME>\SRC\ETL.

   ---

2. Extract the EPM91_DSPARAMS.zip file before you continue.

3. Use the IBM InfoSphere DataStage Administrator Client to navigate to the project properties, as shown in the following example:
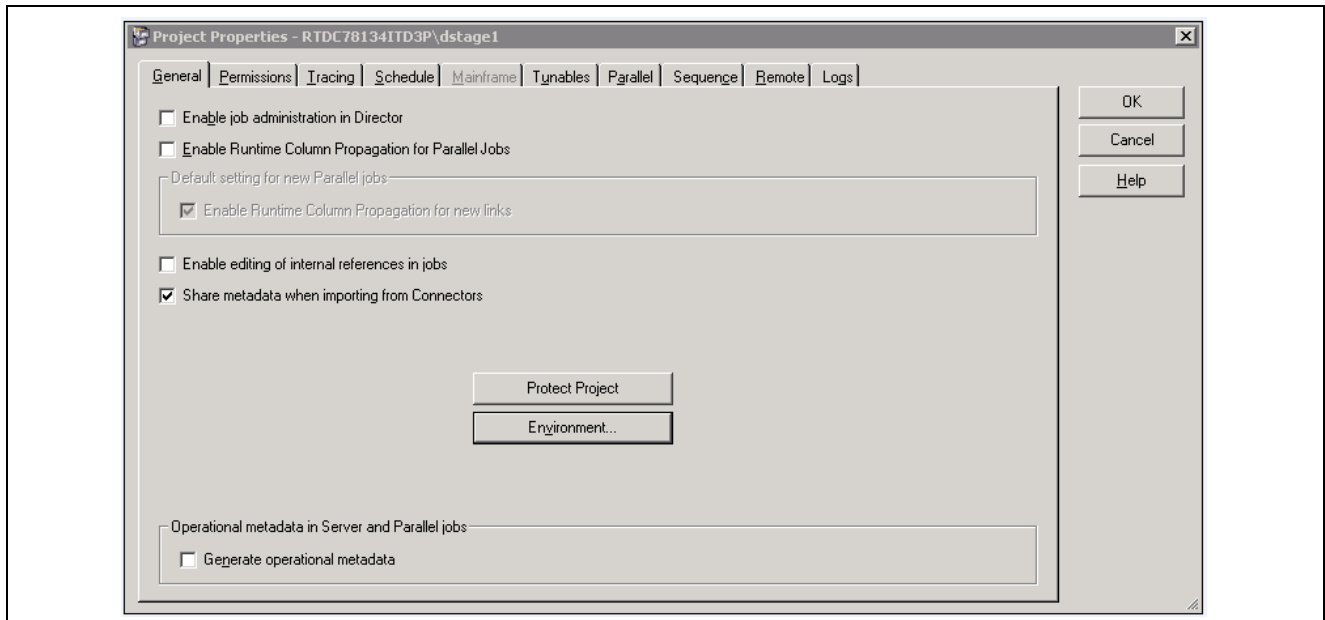
Project Properties - General page

4. On the Project Properties - General page, click the Environment button for importing environment parameters.

   The Environment Variables page appears as shown in the following example:
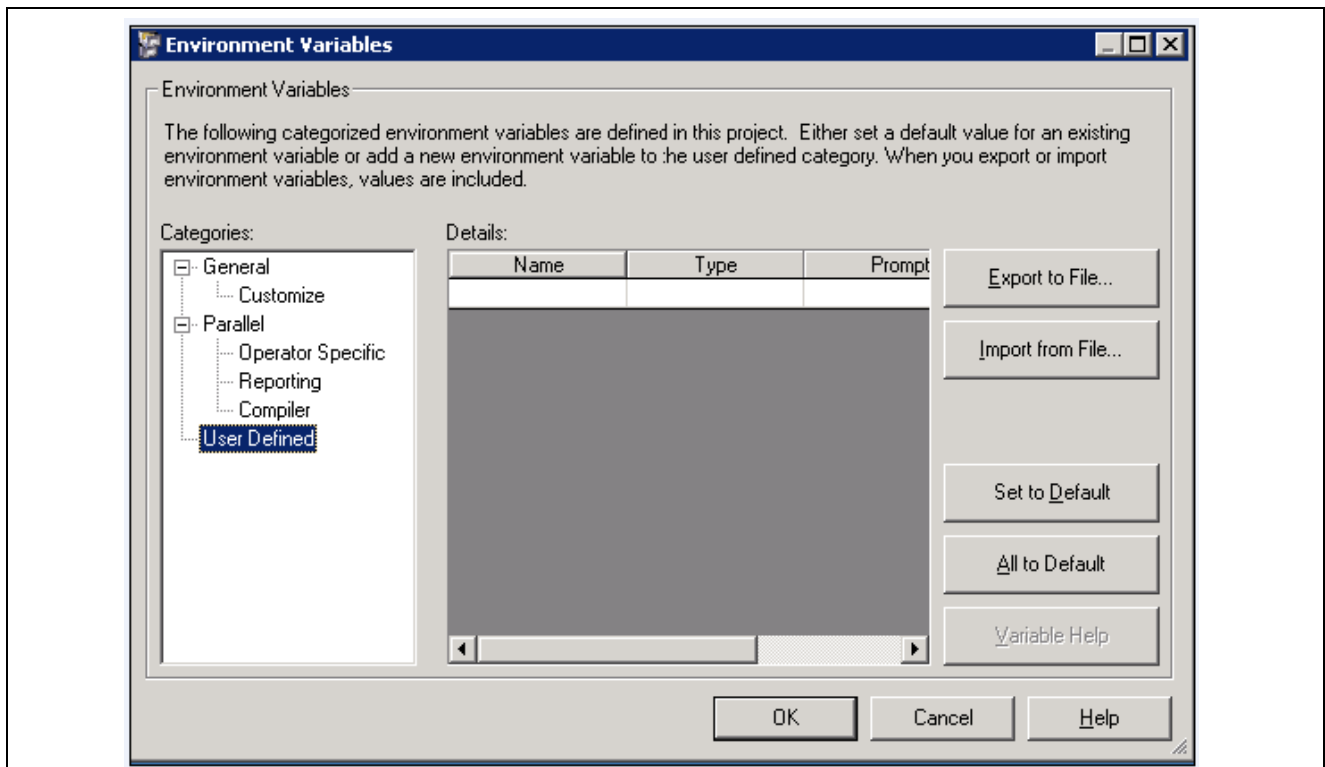
Environment Variables page

5. Click the Import from File button and select the EPM91_DSPARAMS.env file, located on the code tree <PSHOME>\SRC\ETL to import environment parameters, and then click the Open button as shown in the following example.

Note. In a decoupled environment, this file is located in <PS_APP_HOME>\SRC\ETL.

If you do not have a decoupled environment, this file is located in <PS_HOME>\SRC\ETL.
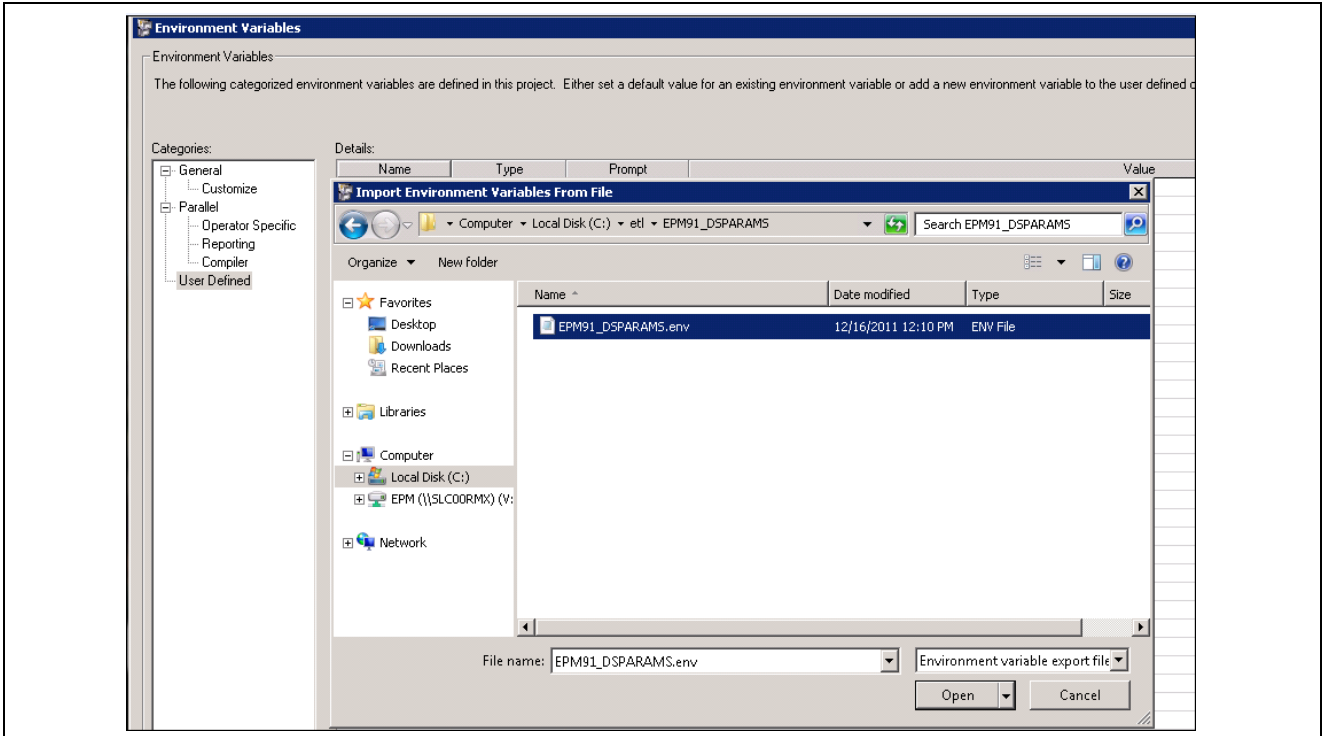
Environment Variable Import - Import Environment Variables From File

The Environment Variable Import - Choose environment variables to import page appears as shown in the following example:
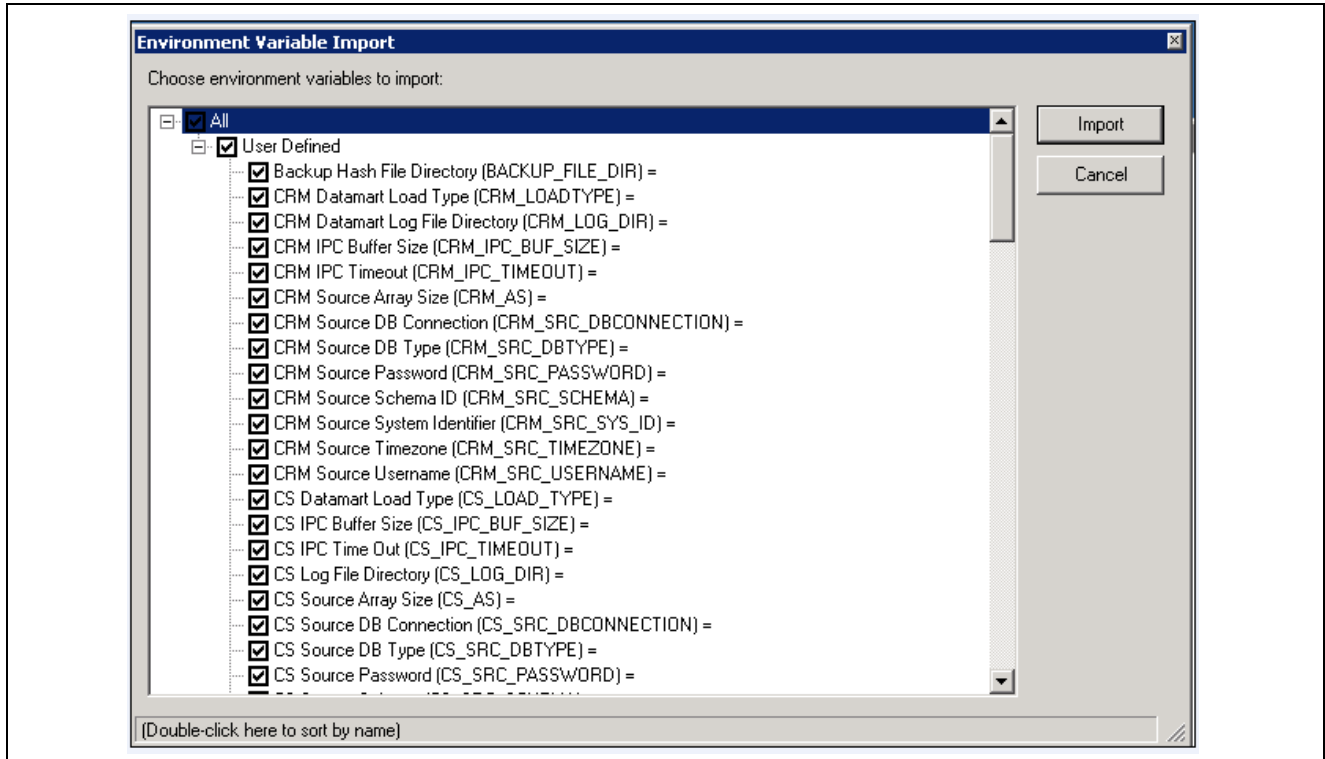
Environment Variable Import - Choose environment variables to import page

6. On the Choose environment variables to import page, select the All check box to import all parameters into the IBM InfoSphere DataStage Project.

    Alternatively, you can select the individual parameter check boxes to import selected parameters into the IBM InfoSphere DataStage Project.
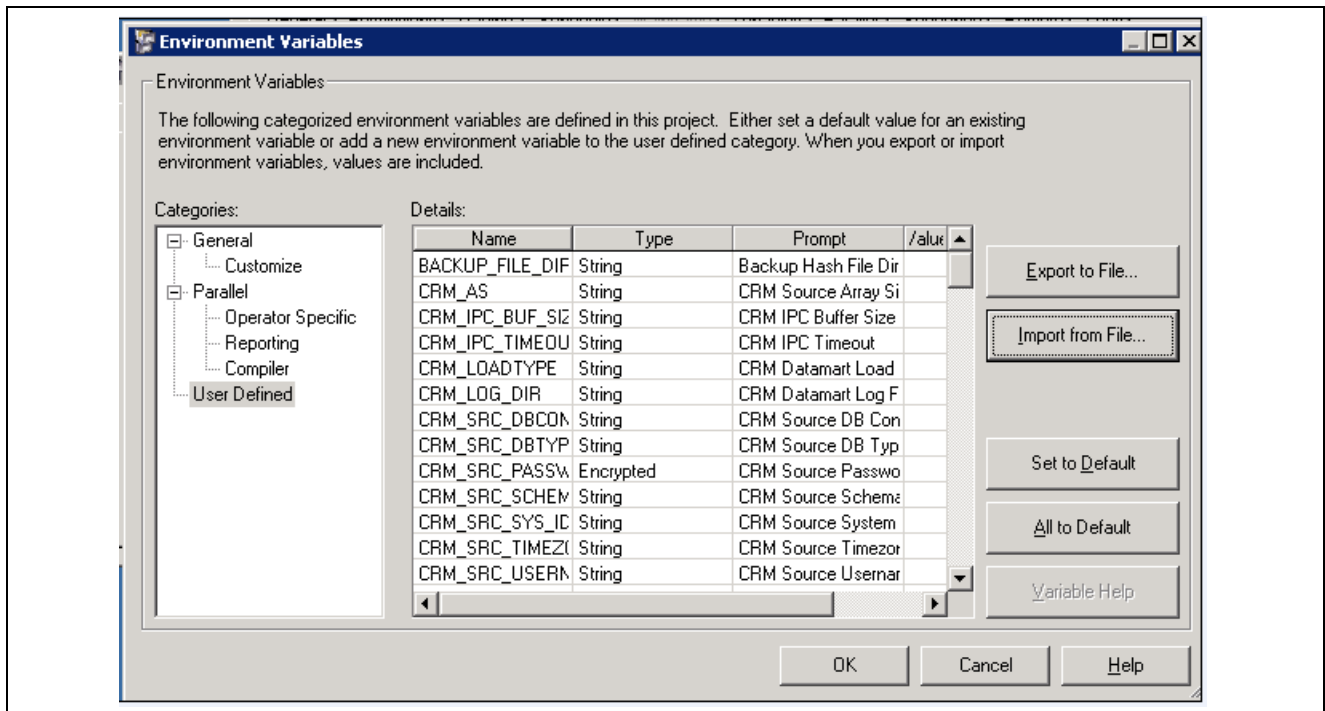
Environment Variable Import report details

7. Review the report for the environment variable import, and then click the Close button.

Note. The Importing Environment Variables option is available only in IBM InfoSphere Datastage 8.5 Fixpack1 (8.5.0.1) and not in the base version of IBM InfoSphere DataStage 8.5 (8.5.0.0) 2).

In IBM InfoSphere DataStage 8.5, when a job is imported, the environment variables are automatically written to DSParams file with "PROJDEF" as the default value, if it is not already present.

Change default value "PROJDEF" to the parameter required value before compiling the ETL jobs or running ETL jobs.

Task 2-8-2: Retaining IBM Infosphere Datastage 8.1 Project Parameters with Corresponding Values for IBM Infosphere Datastage 8.5

This Process details how to retain the IBM Infosphere Datastage 8.1 project parameters with corresponding values to use with the IBM Infosphere Datastage 8.5 project.

To retain IBM Infosphere Datastage 8.1 project parameters with corresponding values to use with the IBM Infosphere Datastage 8.5:

1. Create a new dummy project in DataStage 8.5 (EPM91_Project).

2. Copy the DSPARAMS file from the existing IBM Infosphere Datastage 8.1 project to the dummy IBM Infosphere Datastage 8.5 project (replace the DSParams file in to the dummy project).

   Usually the DSPARAMS file is located in the IBM Infosphere Datastage Projects directory in the server installation path.

   For example: <Installation Drive>\InformationServer\Server\Projects\<ProjectName>

3. Use the IBM Infosphere Datastage 8.5 Administrator client to connect to the dummy project (EPM91_Project) and export the environment parameters to <FileName>.env file.

4. Import the environment parameters backup file <FileName>.env file into the IBM Infosphere Datastage 8.5 project.

Task 2-9: Importing the .DSX Files

The SAMPLE_85.dsx file is available as *SAMPLE_85.zip* on the code tree. Extract the SAMPLE_85.zip file before you perform the import steps that follow.

To import the SAMPLE_85.dsx file:

1. Locate the SAMPLE_85.dsx file (SAMPLE_85.zip) using the following path on the code tree:

   <PSHOME>\SRC\ETL

   Note. In a decoupled environment, this file is located in <PS_APP_HOME>\SRC\ETL.

   If you do not have a decoupled environment, this file is located in <PS_HOME>\SRC\ETL.

   ---

2. Extract the SAMPLE_85.zip file before you continue.

3. From your Start menu, select All Programs, IBM Information Server, IBM InfoSphere DataStage and Quality Stage Designer.

   The Login/Attach to Project page appears, as shown in the following example:
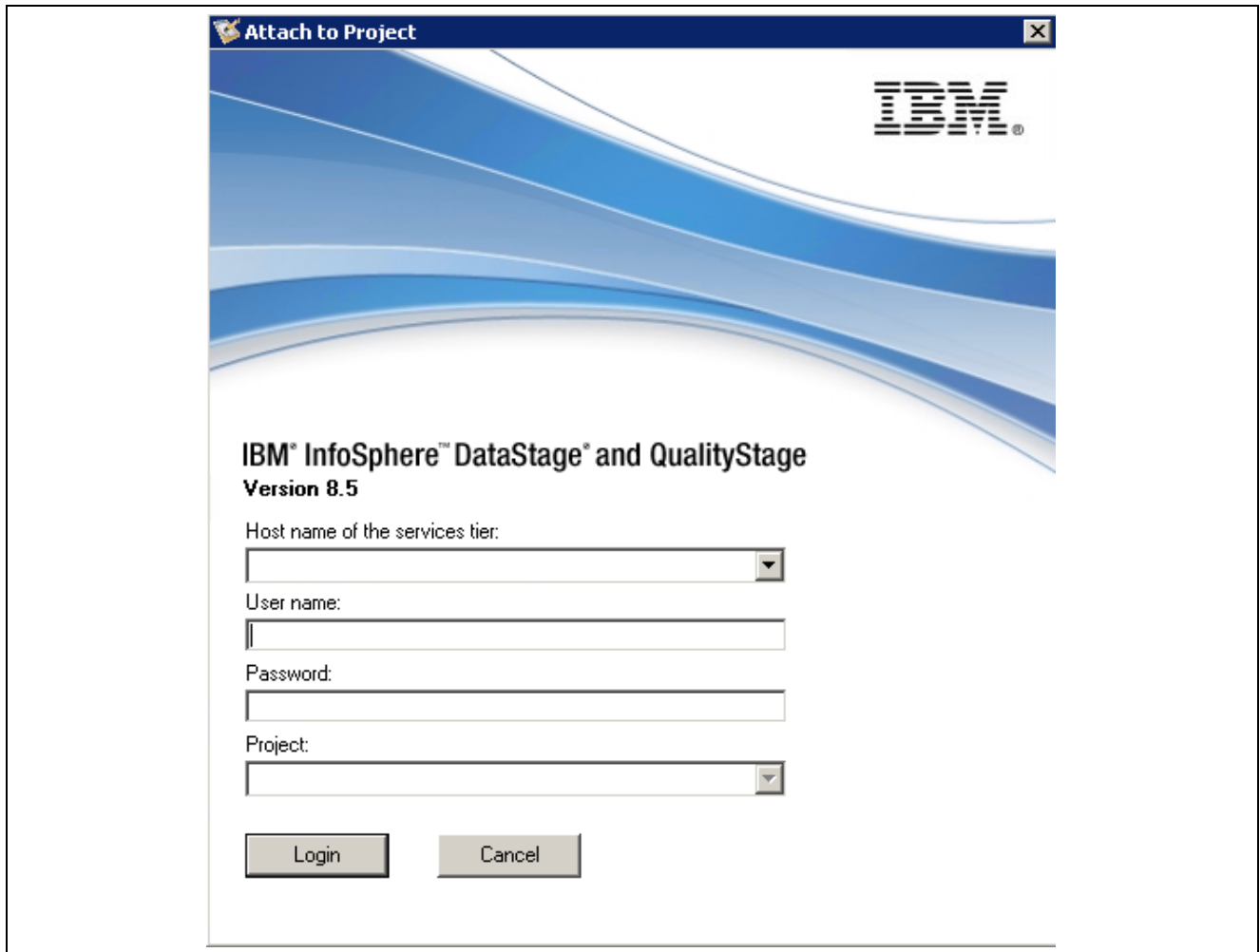
IBM InfoSphere DataStage and Quality Stage - Login/Attach to Project page

4. In the Login/Attach to Project dialog box that appears, enter the following:

   a. In the Domain field, enter the name or IP address of the machine (where the domain server is installed).

   b. Enter a user name and password.

   c. Select the project for which you are importing the SAMPLE_85.dsx file.

      The following example shows the Attach to Project page with the preceding criteria defined:
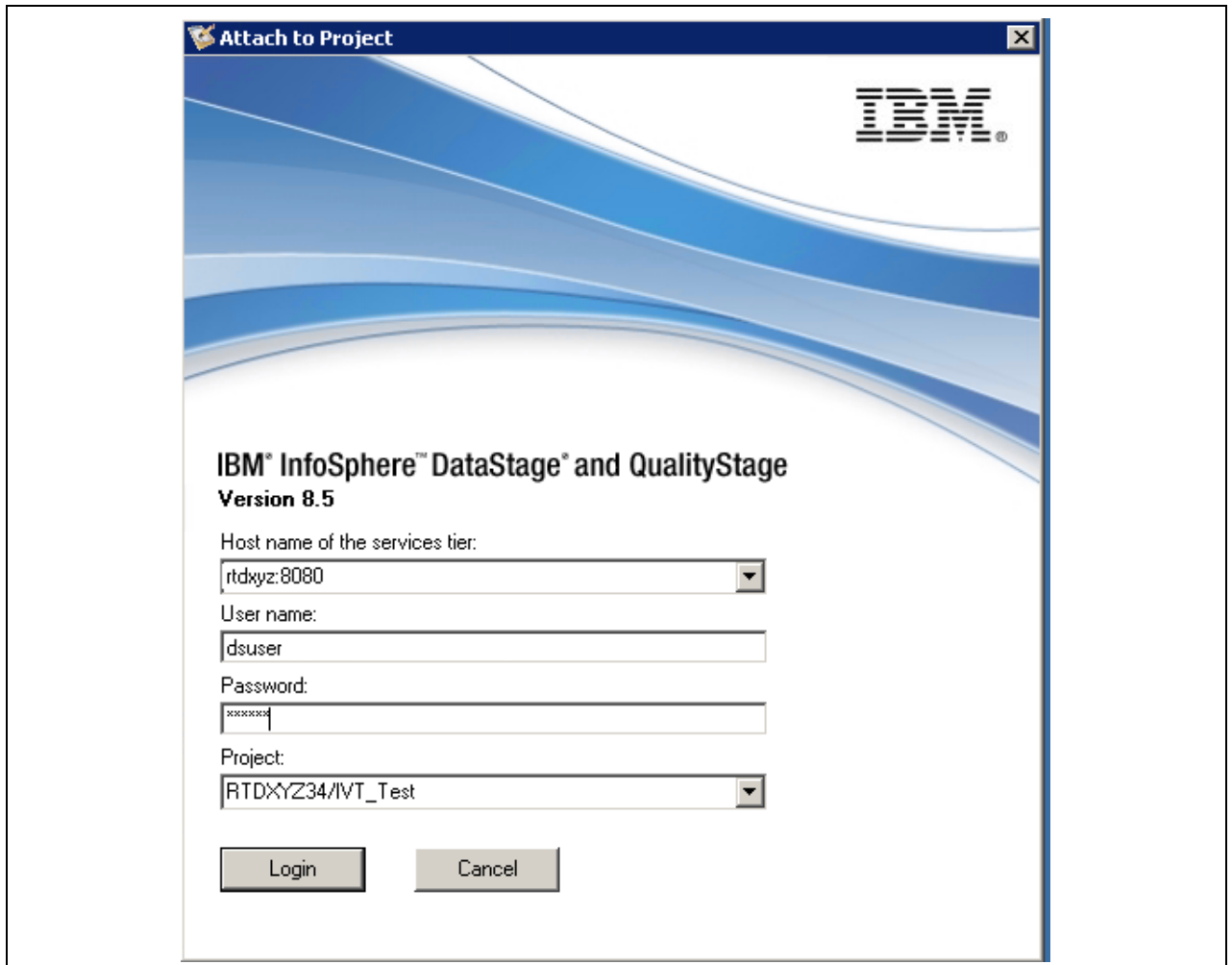
IBM InfoSphere DataStage and Quality Stage - Login/Attach to Project page

5. Click the Login button.

6. From the DataStage Designer menu, select Import, DataStage Components.

The DataStage Repository Import dialog box appears, as shown in the following example:
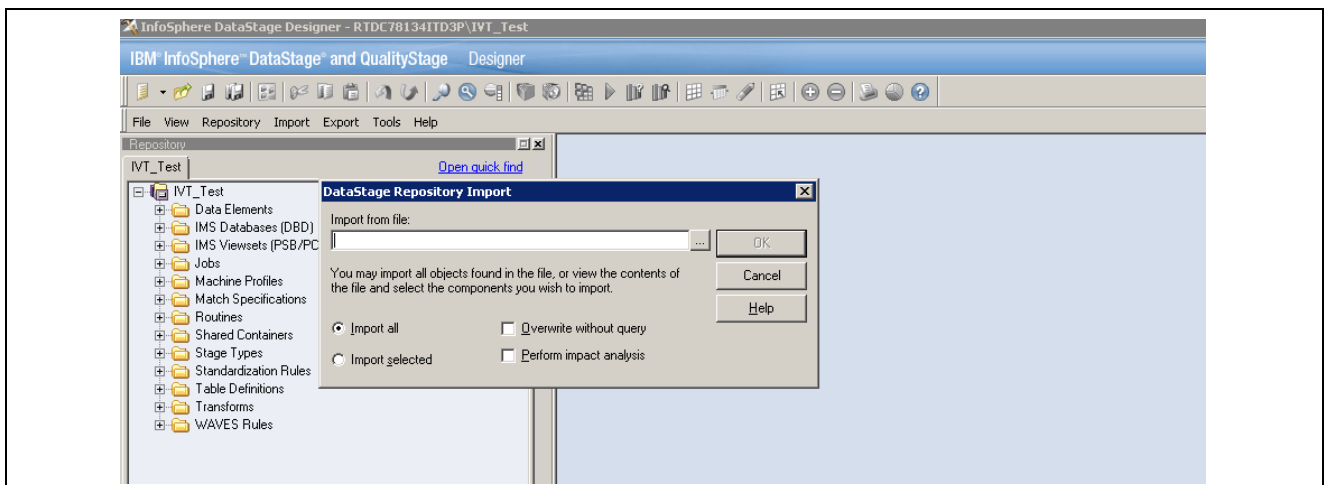
DataStage Repository Import dialog box

7. Click the browse button to locate the SAMPLE_85.dsx file to import into your project, as shown in the following example:
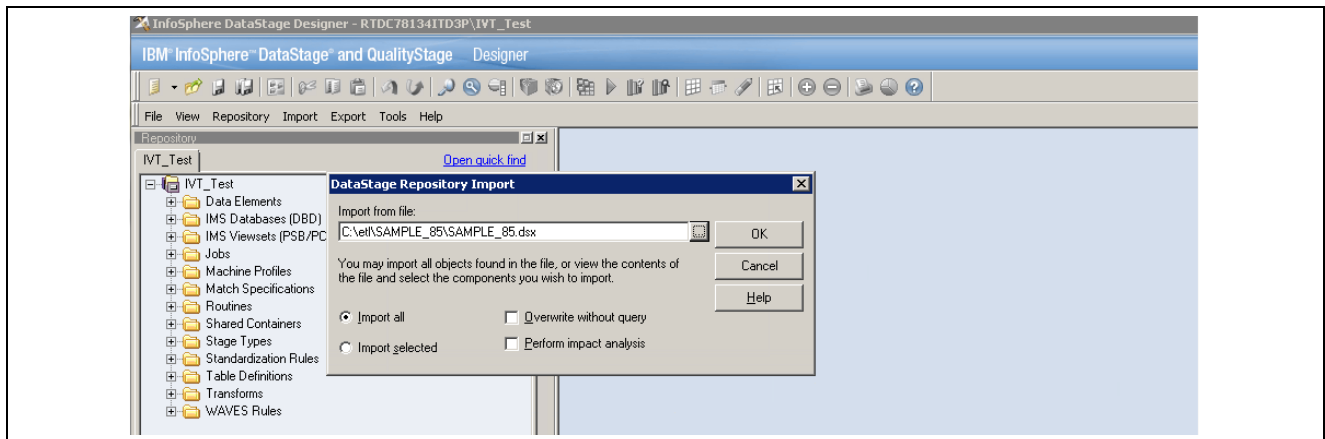
DataStage Repository Import dialog box - Import from file

The .dsx file is located at: *<PS HOME>*\SRC\ETL

Note. In a decoupled environment, this file is located in <PS_APP_HOME>\SRC\ETL.

If you do not have a decoupled environment, this file is located in <PS_HOME>\SRC\ETL.

Note. Do *not* select the Perform impact analysis check box (as shown in the previous example) unless you want to perform usage analysis. Selecting this check box increases the time it takes to import the *.dsx files into a project.

8. Ensure that the Import All option is selected, and then click OK to import the SAMPLE_85.DSX file.

After the import process completes, the Import Progress window closes.

For more details on how to import the .dsx files:

See *PeopleSoft Enterprise Performance Management 9.1 Fundamentals,* "Setting Up DataStage for EPM: Setting Up DataStage Projects."

After you complete this task, *Importing the .DSX Files,* see the following PeopleSoft EPM Warehouse PeopleSoft Online Help (PeopleBooks). Each book has its own *Understanding EPM Warehouses* section that covers the Multidimensional Warehouse and other components that comprise an EPM Warehouse. You can refer to these PeopleSoft Online Help (PeopleBooks) for more information on loading data into the Multidimensional Warehouse and the ETL implementation steps:

• *PeopleSoft EPM: Campus Solutions Warehouse*

• *PeopleSoft EPM: Customer Relationship Management Warehouse*

• *PeopleSoft EPM: Financial Management Solutions Warehouse*

• *PeopleSoft EPM: Financials Warehouse for Public Sector and Higher Education*

• *PeopleSoft EPM: Fusion Campus Solutions Intelligence for PeopleSoft*

• *PeopleSoft EPM: Human Capital Management Warehouse*

• *PeopleSoft EPM: Supply Chain Management Warehouse*

Task 2-10: Migrating Hashed Files From IBM Infosphere DataStage 8.1 to IBM Infosphere DataStage 8.5

This section discusses:

• Migrating SETUP Hashed Files

• Migrating Directory Path Hashed Files

• Migrating VOC Based Hashed Files

• Migrating Parameter Files

In EPM91, most of the hashed files are created in directory path. Therefore, it is very easy to migrate the hashed files from IBM Infosphere DataStage 8.1 project to IBM Infosphere DataStage 8.5 project.

A VOC entry is not created because only few hashed files get created in the Account path.

Task 2-10-1: Migrating SETUP Hashed Files

In EPM91, the two important SETUP Hashed Files available are SDKSequences (to store the SID values) and SDKMaxLastUpdDttm_E (to store the last updated timestamp for a particular job).

To migrate the SETUP Hashed Files SDKSequences and DKMaxLastUpdDttm_E:

1. Execute the jobs Backup_EnterpriseDateTime_HashFiles and Backup_SurrogateKey_HashFile.

    These jobs will read the current SDK files from DataStage 8.1 project and store them in a Sequential File.

    Note. Both the jobs are located at \\Jobs\\Utilities\\Hash_Utils\\Backup.

    ---

2. Next, run the jobs Recovery_EnterpriseDateTime_HashFiles and Recovery_SurrogateKey_HashFile.

    These jobs will read the Sequential File created in Step 1 and create the SDK hashed files in DataStage 8.5 project. So, ensure that the output sequence file created in Step 1 can be accessed by DataStage 8.5 server or move the sequential file to a location from where the DataStage 8.5 server can access it.

    Note. Both the jobs are located at \\Jobs\\Utilities\\Hash_Utils\\Recovery.

Task 2-10-2: Migrating Directory Path Hashed Files

Migration of directory path hashed files deals with copying files from DataStage 8.1 folders to DataStage 8.5 folders at operating system level.

Consider that in DataStage 8.1, the value of Environment variable HASHED_FILE_DIRECTORY is *C:\DS81_Hashed_Files*. Navigate to that particular directory and copy all the files from the folder and paste them in the folder which is set as HASHED_FILE_DIRECTORY in DataStage 8.5. Also, verify if the file count is same in both the directories.

Task 2-10-3: Migrating VOC Based Hashed Files

Whenever a command line execution is performed on a hashed file, then a VOC entry is required for that hashed file. All the SELECT commands are command line executions.

For example, when you use the command SELECT SOME_COLUMNS FROM HASHED_FILE on a hashed file, it displays the selected columns as Output. In such a case, a VOC entry is required for the hashed file.

To create a VOC entry:

- **VOC Entry for Delete Strategy Hashed Files**

  For creating VOC entry for Delete Strategy hashed files:

  a. Copy all the hashed files as detailed in the step "Migrating Directory Path Hashed Files"

  b. Run the jobcontrol "JC_DeleteStrat_SequentialRun" from the category \\Jobs\ReusableJobs_Parallel\ \DeleteStrategy.

     This job will internally call all the required jobs and creates the required VOC entry for the Delete Hashed Files.

- **VOC Entry for Other Hashed Files**

  Apart from Delete Strategy Hashed Files, only a few hashed files require VOC entry. The jobs that create VOC entry for these hashed files are listed in the following table:

Job Name	Warehouse Name	Job Category
J_Hash_PS_EW_OPTIONS	Common Objects	\Jobs\Shared_Lookups\System_ Lookups
J_Hash_PS_PF_BU_ROLE_CODE	Common Objects	\Jobs\Setup_E\Dimension_Mapper \Base\ Load_Hash_Files\Server
J_Hash_PSRECDEFN	Common Objects	\Jobs\EPM_Utilities\Tree_ Recursive_Hierarchy\Load_Hash_ Files
J_Hash_STG_RECNAME	Common Objects	Jobs\EPM_Utilities\Tree_ Recursive_Hierarchy \Load_Hash_Files
J_Hash_PS_D_DAY_SNAPDT	Common Objects	\Jobs\SCM_E\Local_ Dimensions\OWS_To_MDW \Base\Load_Hash_Files\Server

Run these jobs once to create VOC entries for the hashed files.

Task 2-10-4: Migrating Parameter Files

To migrate parameter files in EPM91, you need to copy the required files from their respective folders from the DataStage 8.1 server and then paste them in the respective folders in the DataStage 8.5 server. Also, verify if the file count is same in both the servers.

The parameter files are placed in the following folders:

- BACKUP_FILE_DIR

- FSCM_SRC_XML_DIR

- PARAM_FILE_DIR

- SOURCE_FILE_DIR

Some of the delivered parameter files are:

- CS_HANDLE_DELETES_SETUP.txt

- CS_HANDLE_DELETES_SETUP.txt
- CS_ARCHIVED_LIST_SETUP.txt

CHAPTER 3

Deploying Oracle Fusion Campus Solutions Intelligence for PeopleSoft

This chapter discusses:

- Understanding Deploying Oracle Fusion Campus Solutions Intelligence for PeopleSoft
- Prerequisites
- Deploying Oracle Fusion Campus Solutions Intelligence for PeopleSoft

Understanding Deploying Oracle Fusion Campus Solutions Intelligence for PeopleSoft

This chapter provides instructions for deploying Oracle Fusion Campus Solutions Intelligence for PeopleSoft.

This chapter supplements the installation and configuration instructions for these systems and applications:

- Oracle Business Intelligence Enterprise Edition (OBIEE) 11.1.1.5.0
- PeopleSoft Enterprise Performance Management 9.1 Revision 2.

Installing Oracle Fusion Campus Solutions Intelligence for PeopleSoft applications is grouped into two parts:

- Installing the prerequisite components.
- Deploying Oracle Fusion Campus Solutions Intelligence for PeopleSoft.

  The *Deploying Oracle Fusion Campus Solutions Intelligence for PeopleSoft* section and the tasks contained within provide the deploy instructions.

Note. This chapter provides deploy instructions *only*. For security set up and implementation, see the *Fusion Campus Solutions Intelligence for PeopleSoft 9.1*, available on My Oracle Support.

Note. Before proceeding with your installation, check My Oracle Support, the Oracle Software Delivery Cloud (formerly Oracle E-Delivery), and the Oracle Technology Network to ensure that you have the most current "Fixes Required at Install," bundles and documentation for the products that you are installing.

See My Oracle Support at http://support.oracle.com

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

See Oracle Technology Network at http:/www.oracle.com/technetwork/index.html

Prerequisites

The following requirements must be met before you deploy Oracle Fusion Campus Solutions Intelligence for PeopleSoft 9.1:

• You have completed your installation of Oracle Business Intelligence 11g (11.1.1.5.0).

   The Oracle Business Intelligence 11g Installer, along with the corresponding documentation, is available from the following sources:

   • Oracle Technology Network.

      You can download the Oracle Business Intelligence 11g Installer .zip files for your operating system from the Oracle Technology Network (OTN) at http://www.oracle.com/technetwork/middleware/bi-enterprise-edition/downloads/biee-111150-393613.html

   • Oracle Software Delivery Cloud portal.

      You can download Oracle Business Intelligence 11g Installer .zip file for your operating system from the Oracle Software Delivery Cloud portal at https://edelivery.oracle.com

      See "Using the Oracle Software Delivery Cloud to Access Installation Files," discussed earlier in this document.

• You have installed and configured PeopleSoft Enterprise Performance Management 9.1 Revision 2 application files.

• You have access to the host server as an administrator.

• You are familiar with the following Business Intelligence (BI) installation folders.

   • Middleware Home

   • BI Domain Home

   • Instance Home

• You are familiar with starting and stopping the Oracle Business Intelligence components.

Task 3-1: Deploying Oracle Fusion Campus Solutions Intelligence for PeopleSoft

This section discusses:

• Understanding Deploying Oracle Fusion Campus Solutions Intelligence for PeopleSoft

• Accessing the EPM OBIEE 11g Files

• Copying the Repository File to the New Environment

• Verifying Database Connectivity

• Moving the Oracle BI Presentation Catalog to the New Environment

• Extracting the User Security Data

• Importing the User Security Data to the New Environment

• Moving the Application Role Data

- Deploying the Repository File and the Oracle BI Presentation Catalog

- Stopping All BI Services

- Refreshing Global Unique Identifiers

Understanding Deploying Oracle Fusion Campus Solutions Intelligence for PeopleSoft

This section and the tasks contained within provide the necessary instructions to deploy Oracle Fusion Campus Solutions Intelligence for PeopleSoft.

This section provides deploy instructions *only*. For security set up and implementation, see the product documentation for *PeopleSoft Enterprise Performance Management 9.1 Fusion Campus Solutions Intelligence for PeopleSoft* available on My Oracle Support.

Task 3-1-1: Accessing the EPM OBIEE 11g Files

Access the files for PeopleSoft EPM OBIEE 11g that are delivered with your PeopleSoft EPM 9.1 Revision 2 media pack and download.

The following files are located in the BI folder, after you complete your PeopleSoft EPM 9.1 Revision 2 application installation.

- Repository (RPD) file (EPM91_Master_11g.zip)

- Web catalog (EPM91_Master_Webcat_11G.zip)

- User data (BIUSERS.zip)

- Application Role data (system-jazn-data.zip)

Task 3-1-2: Copying the Repository File to the New Environment

Unzip and copy the repository file to the local repository location:

Instance Home\bifoundation\OracleBIServerComponent\coreapplication_obis1\repository

Task 3-1-3: Verifying Database Connectivity

Verify database connectivity as follows:

1. Open the delivered RPD file in off-line mode using the BI Administration tool.

2. Provide the password.

   The password is *welcome1*.

3. Make the necessary changes to the following connection pools to point to your test or demo environment:

   a. MDW InitBlock Connection Pool

   b. MDW Connection Pool

4. Verify connectivity by viewing the data or by performing an update row count for a table.

   The following provides an example of how to view the data in a table:

   a. In the physical layer, right-click the table, F_CASE.

   b. Select View Data from the menu.

    c. In the window that appears, double-click the first connection pool to view data in the table.

    d. Repeat these steps for the second connection pool.

5. Resolve any database connectivity issues before you proceed.

Task 3-1-4: Moving the Oracle BI Presentation Catalog to the New Environment

Move the Oracle BI Presentation Catalog folder to the new environment as follows:

1. Unzip the file on a root directory, such as 'C'.

   Ensure that you completely unzip and extract the files and that you receive no warnings.

2. Cut and paste the web catalog folder (EPM91_Master_11g) to the server catalog location:

   Instance Home\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obips1\catalog

---

Note. There is a limit on the total full path name string size for files and folders. This means that there is a limit on nesting depth for folders, which varies depending on the name lengths in the paths. The delivered web catalog folders (tree) are very deep. Therefore, it is a good idea to unzip the catalog folders on a root directory, and then cut and paste them to the destination location.

Task 3-1-5: Extracting the User Security Data

Unzip to extract the delivered user security data to a location that is accessible to the server, as shown in the following example:
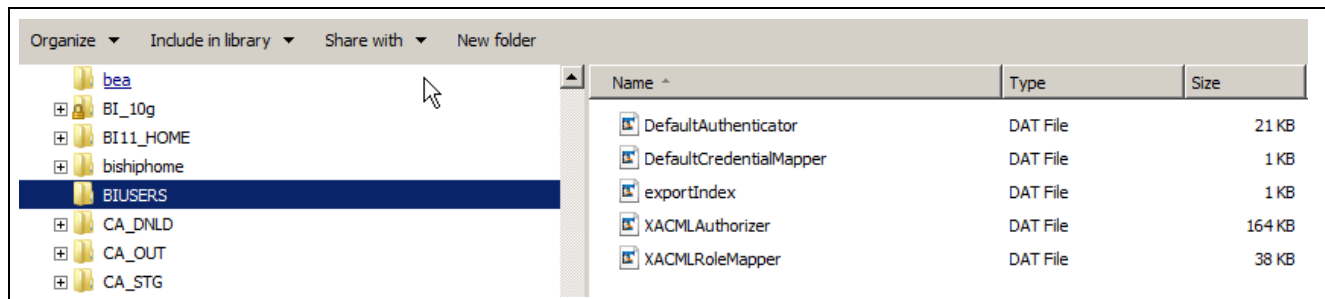
delivered user security data

Task 3-1-6: Importing the User Security Data to the New Environment

Import the user security data to the new environment as follows:

Note. This task is *only* required if you are deploying new OBIEE 11g content for PeopleSoft EPM 9.1 for the first time and the delivered EPM users and roles are not in the environment.

---

1. Log in to your Oracle WebLogic Server Administration Console, using the user ID and password provided by your system administrator.

   a. In the browser instance, enter the location of the host to start the WebLogic Administration Console.

      For example: *http://localhost:7001/console*

      The Oracle WebLogic Server 11g Administration Console - Welcome page appears.

b. On the Welcome and login page, enter the user ID and password provided by your system administrator.

The Oracle WebLogic Server 11g Administration Console - Home page appears, as shown in the following example:
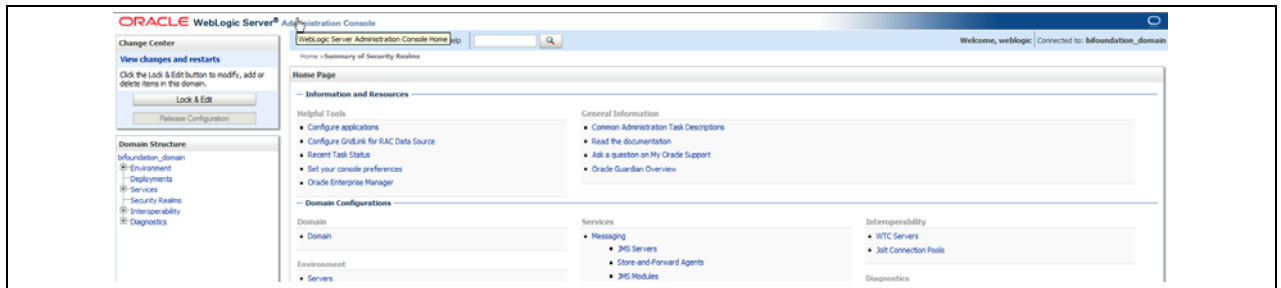
Oracle WebLogic Administration Console - Home page

2. On the Home page, click the Security Realms link.

The Oracle WebLogic Server Administration Console - Summary of Security Realms page appears, as shown in the following example:
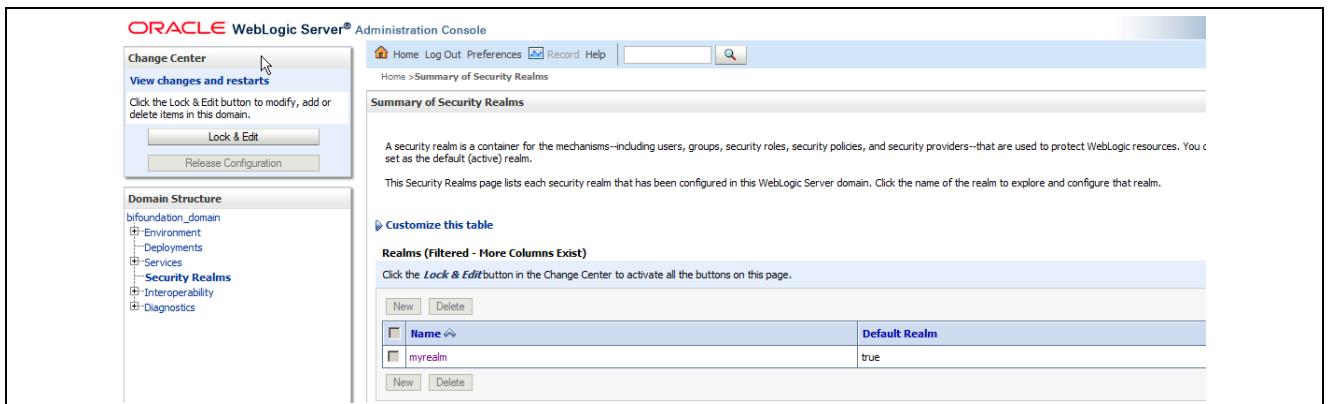
Oracle WebLogic Server Administration Console - Summary of Security Realms page

3. On the Summary of Security Realms page, click the myrealm link to open the default security realm.

Oracle WebLogic Server Administration Console - Settings for myrealm page appears, as shown in the following example:
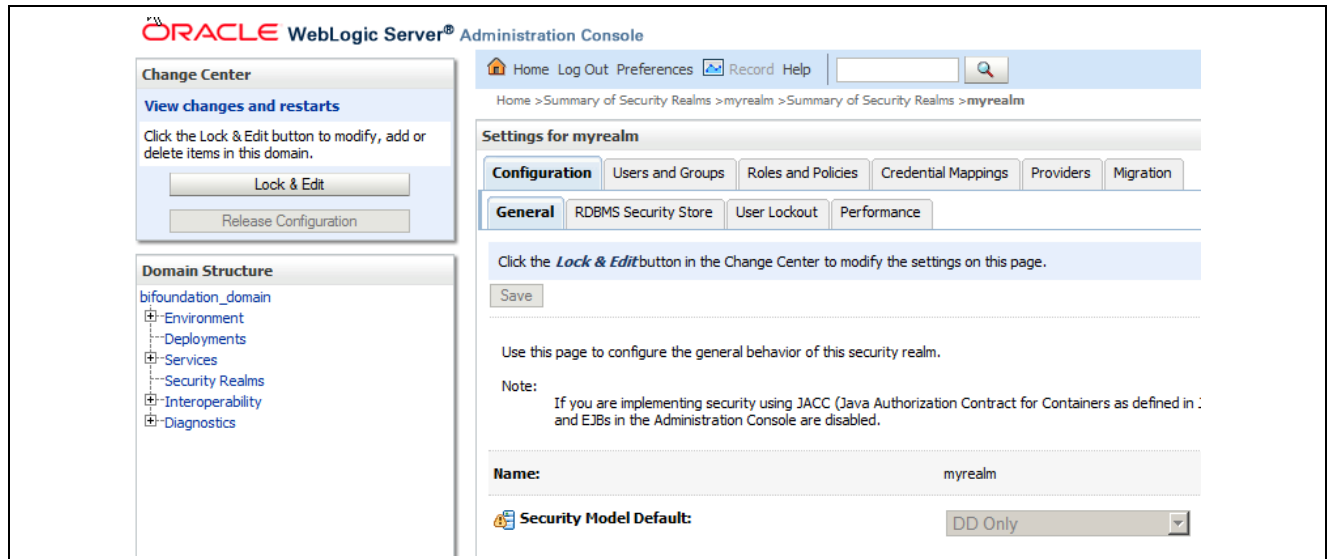
Oracle WebLogic Server Administration Console - Settings for myrealm page

4. On the Settings for myrealm page, select the Migration tab to access the Migration page and Import/Export options.

5. On the Migration page, select the Import tab to import user data.

6. On the Import page, in the Import Directory on Server field, enter the import directory name including the path, as shown in the following example:
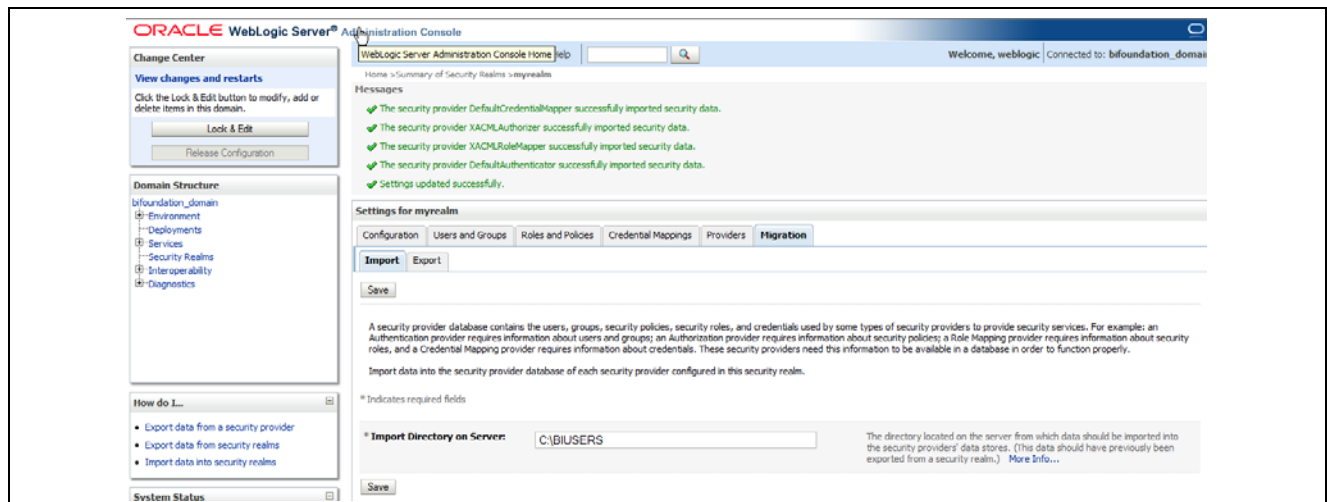
Oracle WebLogic Server Administration Console - Settings for myrealm - Migration: Import page

7. Click Save.

8. Verify that the user, *Administrator*, is imported successfully.

    a. Under Settings for myrealm, select the Users and Groups tab.

        You should see a new user, Administrator.

    b.   Click the Administrator link to see the user setup.

    c. On the Settings for Administrator page, you can select the General, Password, Attributes or Group tabs to configure further.

Task 3-1-7: Moving the Application Role Data

To move the application role data:

1. Navigate to {BI Domain Home}\config\fmwconfig directory.

2. Create a backup copy of the file system-jazn-data.xml

3. Unzip and extract system-jazn-data.zip to a local temporary drive.

4. Cut and move the unzipped file, system-jazn-data.xml, to {BI Domain Home}\config\fmwconfig directory.

Task 3-1-8: Deploying the Repository File and the Oracle BI Presentation Catalog

To deploy the repository file and the Oracle BI Presentation Catalog in the new environment:

1. Start the Oracle Enterprise Manager.

    For example: *http://localhost:7001/em*

    The Oracle Enterprise Manager 11g Fusion Middleware Control - Login page appears.

2. On the Login page, enter the administrator user name, *Administrator*, and the password, *welcome1*, and then click Login.

    The Oracle Enterprise Manager 11g Fusion Middleware Control - Farm Tree page appears.
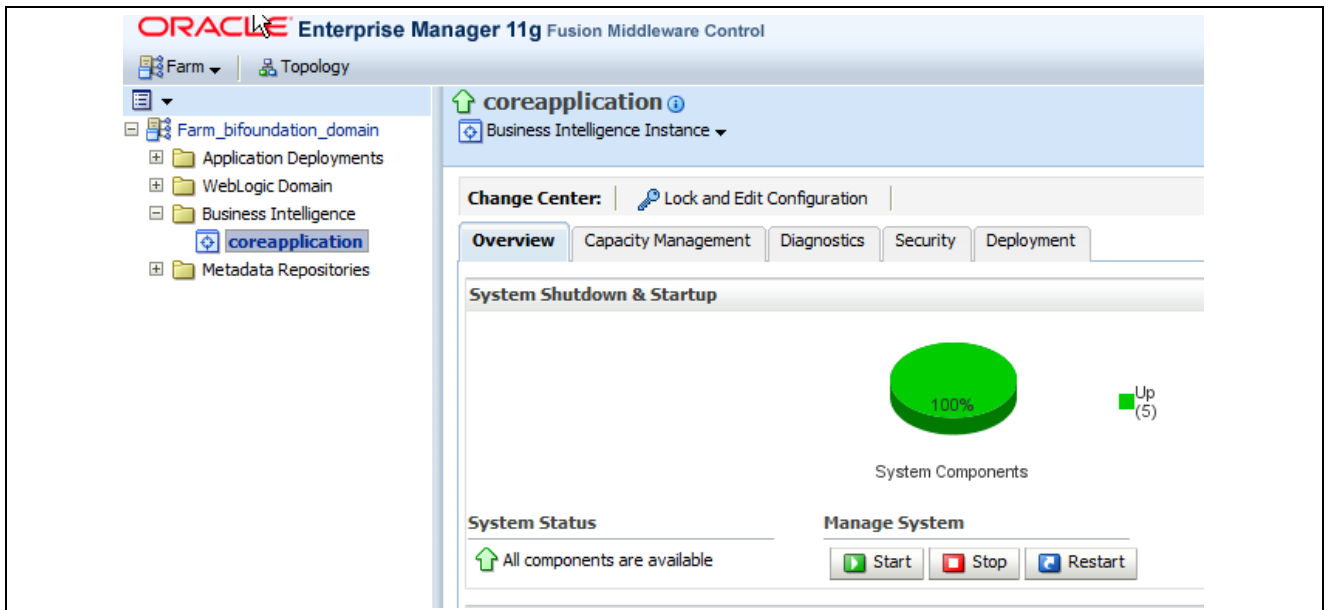
Oracle Enterprise Manager 11g Fusion Middleware Control - Farm Tree page

3. On the Farm Tree page in the left pane, select Business Intelligence, Core Application, Overview.

    The Overview page appears.

4. In the right pane, select the Deployment tab to access the Deployment page, and then select the Repository tab, as shown in the following example:
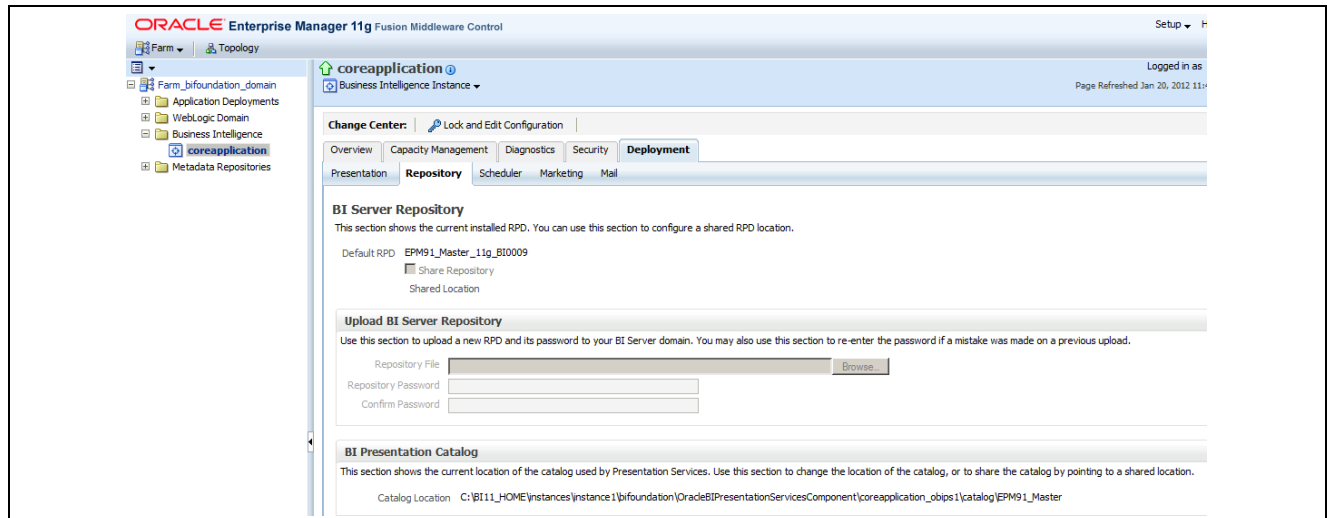
Oracle Enterprise Manager - Deployment: Repository page

5. On the Repository page, you can view the name of the current uploaded repository, Default RPD.

6. Click the Lock and Edit Configuration button to enable editing.

7. Click the Browse button to locate and select the rpd file.

8. Enter the repository password, *welcome1*.

9. Set the location for the Oracle BI Presentation Catalog.

    This is the server catalog location that you determined in the earlier task "Moving the Oracle BI Presentation Catalog to the New Environment."

    Instance Home\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obips1\catalog

10. Click the Apply button.

11. Select the Capacity Management tab to access the Capacity Management page.

12. On the Capacity Management page, select the Performance tab to access the Performance Options.

13. On the Performance page, deselect (clear) the Cache enabled check box.

14. Click the Apply button and then click the Activate Changes button.

    Wait for the activation process to complete.

Task 3-1-9: Stopping All BI Services

From a command prompt, stop all of the BI services.

You can access this command from your Start menu by selecting All Programs, Oracle Business Intelligence, Stop BI Services.

Note. Only a WebLogic Administrator can invoke this command. The administrator user ID and password are required.

For additional information about stopping Oracle BI components:

See "Starting and Stopping Oracle Business Intelligence" at http://docs.oracle.com/cd/E21764_01/bi.1111 /e10541/components.htm#g1177662

Task 3-1-10: Refreshing Global Unique Identifiers

You do not typically need to refresh Global Unique Identifiers (GUIDs) in the LDAP directory (identity store users). You only need to do so if the user IDs are out of sync with the user IDs in the repository, or for a new deployment.

You also need to refresh GUIDs if you are unable to log in to the BI Analytics with the delivered user, *Administrator*.

To refresh the user GUIDs:

1. Open the NQSConfig.INI file for editing.

    You can find this file in *Instance Home\config\OracleBIServerComponent\coreapplication_obis1*, as shown in the following example:
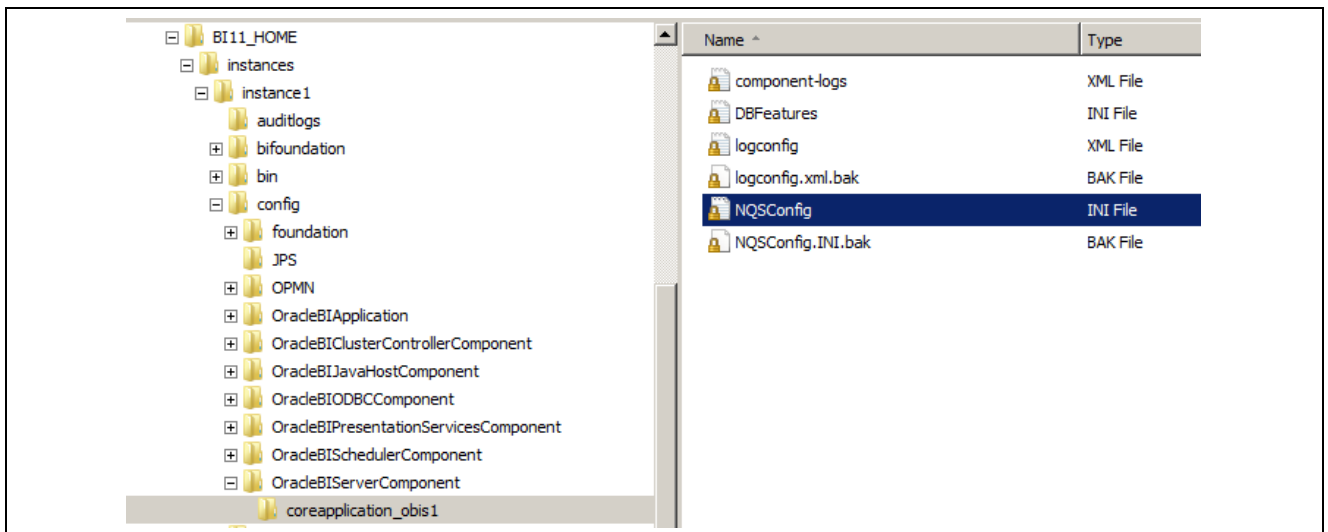
NQSConfig.INI file location

2. Locate the setting FMW_UPDATE_ROLE_AND_USER_REF_GUIDS.

    FMW_UPDATE_ROLE_AND_USER_REF_GUIDS=NO

3. Change the value to *YES*.

    FMW_UPDATE_ROLE_AND_USER_REF_GUIDS = YES

4. Open the instanceconfig.xml file for editing.

    You can find this file in *Instance Home\config\OracleBIPresentationServicesComponent\coreapplication_ obips1*, as shown in the following example:
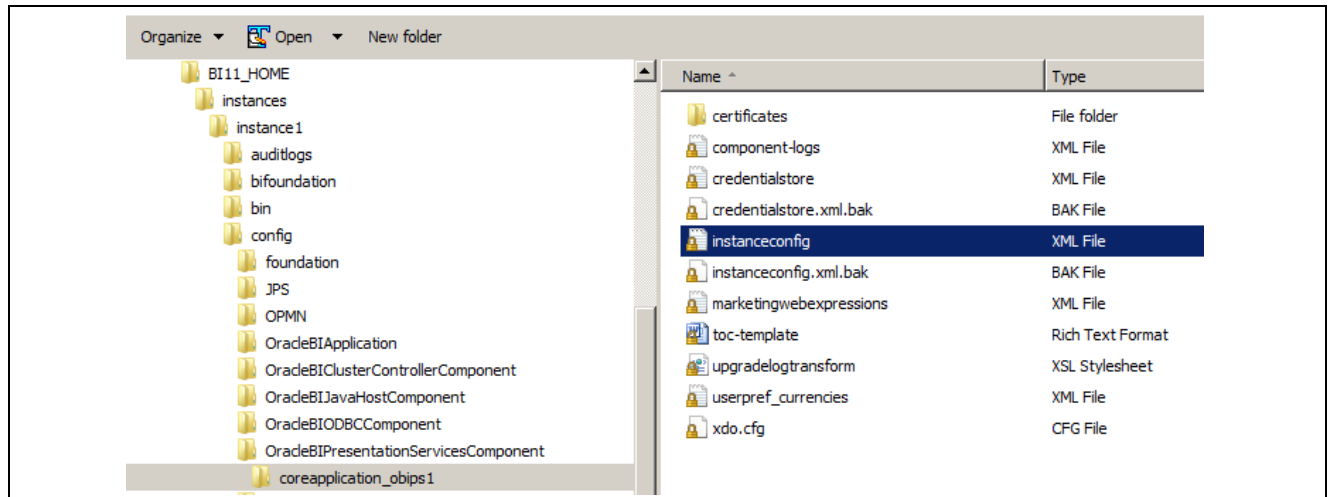
instanceconfig.xml file location

5. Modify the instanceconfig.xml file to instruct Presentation Services to refresh GUIDs on restart.

    Locate the element <UpgradeAndExit> under the element <Catalog> and add (or modify) the following line:

    <UpdateAccountGUIDs>UpdateAndExit</UpdateAccountGUIDs>

6. From a command prompt, start the BI services.

    You can access this command from your Start menu by selecting All Programs, Oracle Business Intelligence, Start BI Services.

    Note. Only an Oracle WebLogic administrator can invoke this command.

    The following components are involved:

    • Presentation Services

    • Oracle BI Server

    • Oracle BI Scheduler

    • Oracle BI Cluster Controller

    • Oracle BI JavaHost

7. Log in to the Oracle Enterprise Manager to confirm that the services restarted, as shown in the following example:
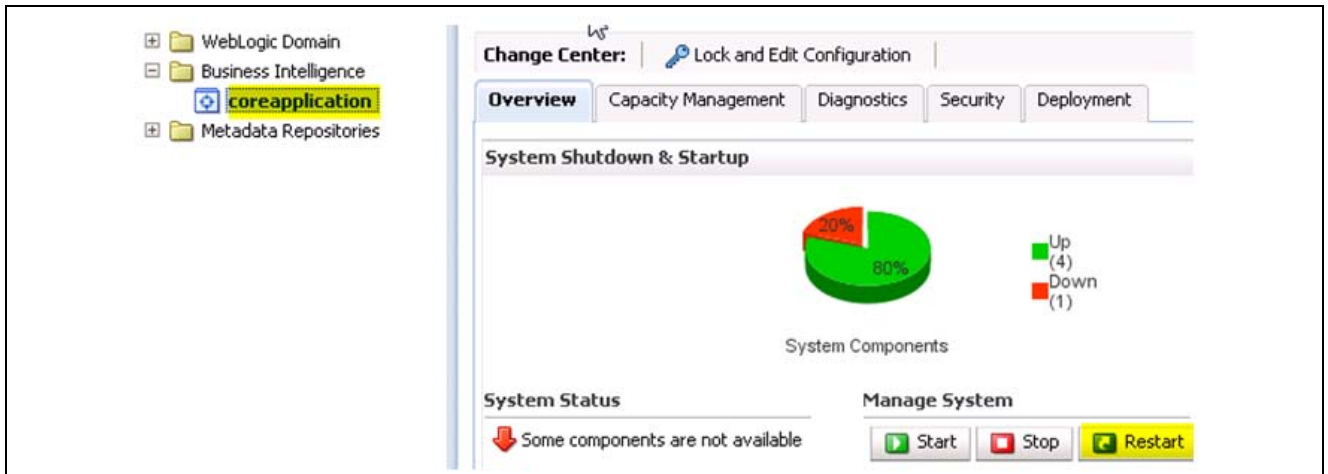
Oracle Enterprise Manager - Farm Tree: Overview page

Note that all of the components do not start at this stage.

8. Edit the NQSConfig.INI file to reset the FMW_UPDATE_ROLE_AND_USER_REF_GUIDS=YES to *NO*.

You can find this file in *Instance Home\config\OracleBIServerComponent\coreapplication_obis1*, as shown in step 1 of this task "Refreshing Global Unique Identifiers."

9. Remove element, set <UpdateAccountGUIDs> to none, or comment out the last line that you added earlier to the instanceconfig.xml file.

For example: <UpdateAccountGUIDs>none</UpdateAccountGUIDs>

10. Restart the BI services from the Oracle Enterprise Manager (EM).
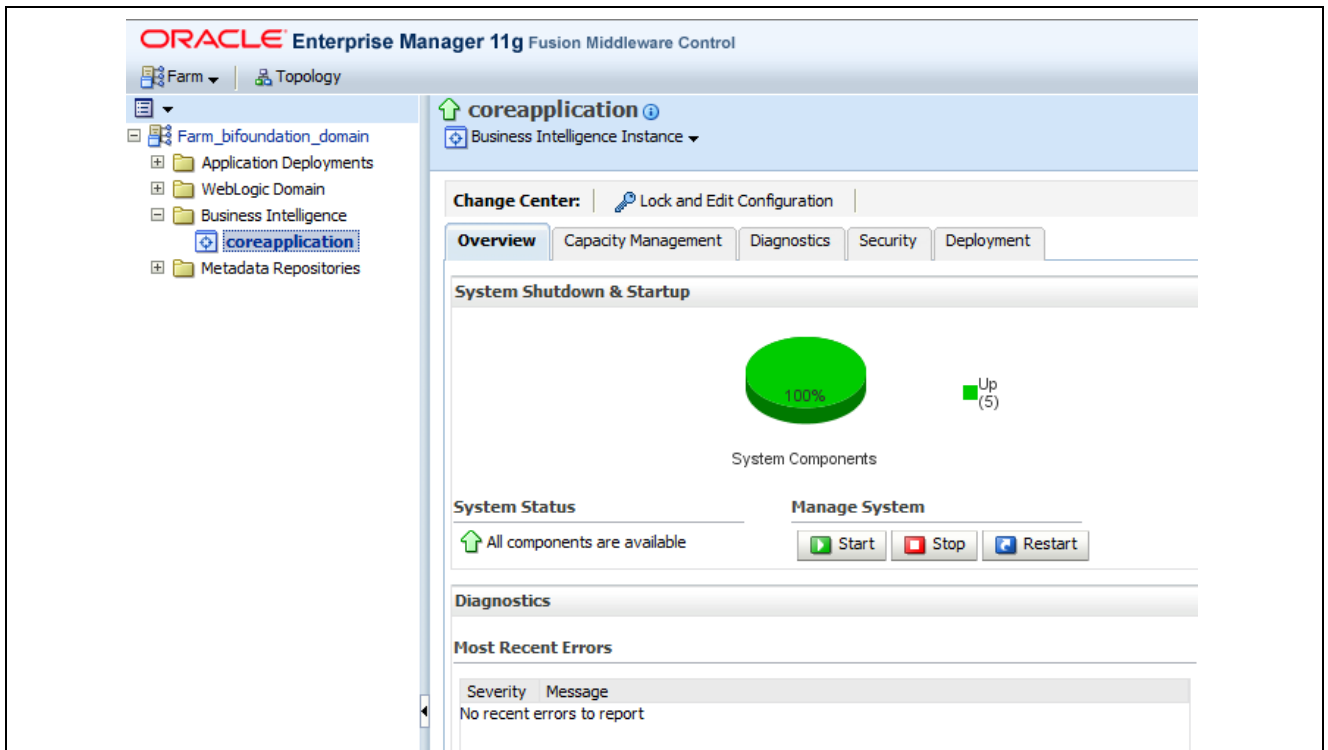
Oracle Enterprise Manager - Farm Tree: Overview page

11. Verify that all of the services restart.

12. Log in to the Analytics to verify reports and dashboards.

    For example: http://YourHostName:Port/analytics

13. Enter the user ID, *Administrator*, and password, *welcome1*.

This completes the deployment of Oracle Fusion Campus Solutions Intelligence for PeopleSoft 9.1. This chapter provides deployment instructions only. For security set up and implementation, see the product documentation for *PeopleSoft Enterprise Performance Management 9.1 Fusion Campus Solutions Intelligence for PeopleSoft,* available on My Oracle Support and the PeopleSoft Hosted Documentation web site.

Index

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