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# PeopleSoft Deployment Packages for Elasticsearch Installation (PeopleSoft PeopleTools 8.55)

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**October 2019**

PeopleSoft Deployment Packages for Elasticsearch Installation (PeopleSoft PeopleTools 8.55)  
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# About This Documentation

## Understanding This Documentation

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This documentation is designed to guide you through the deployment of the Oracle's PeopleSoft Deployment Packages. It is not a substitute for the documentation provided for PeopleSoft PeopleTools or PeopleSoft applications.

## Typographical Conventions

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

Convention	Description
Monospace	Indicates a PeopleCode program or other code, such as scripts that you run during the install. Monospace is also used for messages that you may receive during the install process.
<i>Italics</i>	Indicates field values, emphasis, and book-length publication titles. Italics is also used to refer to words as words or letters as letters, as in the following example:  Enter the letter <i>O</i> .  Italics are also used to indicate user-supplied information. For example, the term <i>domain</i> is used as a placeholder for the actual domain name in the user's environment. When two such placeholders are used together, they may be set apart with angle brackets. For example, the path <code>&lt;PS_CFG_HOME&gt;/appserv/&lt;domain&gt;</code> includes two placeholders that require user-supplied information.
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or page.
lower case	File or directory names are represented in lower case, unless they appear otherwise on the interface.
Menu, Page	A comma (,) between menu and page references indicates that the page exists on the menu. For example, "Select Use, Process Definitions" indicates that you can select the Process Definitions page from the Use menu.

Convention	Description
Cross-references	<p>Cross-references that begin with <i>See</i> refer you to additional documentation that will help you implement the task at hand. We highly recommend that you reference this documentation.</p> <p>Cross-references under the heading <i>See Also</i> refer you to additional documentation that has more information regarding the subject.</p>
⇒ (line-continuation arrow)	A line-continuation arrow inserted at the end of a line of code indicates that the line of code has been wrapped at the page margin. The code should be viewed or entered as a continuous line of code, without the line-continuation arrow.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meaning.
<b>Note.</b> Note text.	Text that begins with <i>Note.</i> indicates information that you should pay particular attention to as you work with your PeopleSoft system.
<b>Important!</b> Important note text.	A note that begins with <i>Important!</i> is crucial and includes information about what you need to do for the system to function properly.
<b>Warning!</b> Warning text.	A note that begins with <i>Warning!</i> contains critical configuration information or implementation considerations; for example, if there is a chance of losing or corrupting data. Pay close attention to warning messages.

## Products

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This documentation may refer to these products and product families:

- Oracle® BPEL Process Manager
- Oracle® Enterprise Manager
- Oracle® Tuxedo
- Oracle® WebLogic Server
- Oracle's PeopleSoft Application Designer
- Oracle's PeopleSoft Change Assistant
- Oracle's PeopleSoft Change Impact Analyzer
- Oracle's PeopleSoft Data Mover
- Oracle's PeopleSoft Process Scheduler
- Oracle's PeopleSoft Pure Internet Architecture
- Oracle's PeopleSoft Customer Relationship Management
- Oracle's PeopleSoft Enterprise Learning Management

- Oracle's PeopleSoft Enterprise Performance Management
- Oracle's PeopleSoft Financial Management
- Oracle's PeopleSoft Human Capital Management
- Oracle's PeopleSoft Interaction Hub
- Oracle's PeopleSoft Pay/Bill Management
- Oracle's PeopleSoft PeopleTools
- Oracle's PeopleSoft Staffing Front Office
- Oracle's PeopleSoft Supply Chain Management

See the Products area on the Oracle web site, <http://www.oracle.com/us/products/product-list/products-a-z/index.html>.

## Related Information

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Oracle provides reference information about PeopleSoft PeopleTools and your particular PeopleSoft Application. You can access documentation for recent releases of PeopleSoft PeopleTools and PeopleSoft Applications at the PeopleSoft Hosted Documentation site. You can also find documentation by searching for the product name on My Oracle Support.

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

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

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

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

See Oracle PeopleSoft Online Help, <http://www.peoplesoftonlinehelp.com>.

- 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 install additional component software products for use with PeopleSoft products, including those products that are packaged with your PeopleSoft products as well as products from other vendors, you should refer to the documentation provided with those products, as well as this documentation. For those additional components that are offered by Oracle, such as Oracle Middleware products, see the documentation on the Oracle Help Center.

## See Also

Oracle Help Center, <https://docs.oracle.com/en/>

## Comments and Suggestions

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

PSOFT-Infodev\_US@oracle.com

## Preface

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

## Chapter 1

# Preparing to Deploy

This chapter discusses:

- Understanding Elasticsearch for PeopleSoft Search Framework
- Prerequisites
- Reviewing Elasticsearch Installation Use Cases

## Understanding Elasticsearch for PeopleSoft Search Framework

This section discusses:

- Understanding Elasticsearch Support
- Understanding the Elasticsearch 2.3.2 Deployment Package
- Understanding the Elasticsearch 6.1.2 Deployment Package
- Reviewing the Elasticsearch Deployment

### Understanding Elasticsearch Support

Elasticsearch is an open-source search engine used for the PeopleSoft Search Framework for PeopleSoft 9.2 applications on PeopleTools 8.55.11 and higher releases. Elasticsearch is open-source software based on Apache Lucene™, a Java-based information retrieval library. Oracle provides Elasticsearch as deployment packages (DPK) for Linux and Microsoft Windows that deliver the required Elasticsearch software version, Java-based plug-ins needed for integration with PeopleSoft environments, and customized code where required. Be sure to obtain and use the Elasticsearch DPKs as described in this documentation.

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**Note.** Oracle recommends that Elasticsearch be installed on supported Linux and Microsoft Windows servers that are separate from those used for PeopleSoft installations.

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As of PeopleSoft PeopleTools 8.55.26, Elasticsearch DPKs are available incorporating either Elasticsearch 2.3.2 or 6.1.2. This documentation includes information for installing both types of Elasticsearch DPKs. Before beginning the installation, review the support information on the Elasticsearch Home Page to learn which Elasticsearch DPK is supported for your environment.

See PeopleTools Elasticsearch Home Page, My Oracle Support, Doc ID 2205540.2, <https://support.oracle.com/epmos/faces/DocumentDisplay?id=2205540.2>.

Oracle recommends a high priority be placed in moving to Elasticsearch. For more information, see these resources:

- For information on support, see "Elasticsearch the Only Search Engine Supported for PeopleSoft as of May 1st."

See PeopleSoft Technology Blog, <https://blogs.oracle.com/peopletools/elasticsearch-the-only-search-engine->

[supported-for-peoplesoft-as-of-may-1st](#).

- For information on Oracle SES support, see "Time to Move to Elasticsearch with PeopleSoft."  
See PeopleSoft Technology Blog, <https://blogs.oracle.com/peopletools/time-to-move-to-elasticsearch-with-peoplesoft>.
- For information on moving from an environment using Oracle SES to one using Elasticsearch, see *PeopleSoft Applications: Moving from SES to Elasticsearch*.  
Go to the PeopleTools Elasticsearch Home Page, select the Elasticsearch on PeopleTools 8.55 tab, and expand the section Moving from SES to Elasticsearch on PeopleTools 8.55.  
See PeopleTools Elasticsearch Home Page, My Oracle Support, Doc ID 2205540.2, <https://support.oracle.com/epmos/faces/DocumentDisplay?id=2205540.2>.
- For a summary of use cases for using Elasticsearch, see the first chapter of this documentation.  
See "Preparing to Deploy," Reviewing Elasticsearch Installation Use Cases.

## Understanding the Elasticsearch 2.3.2 Deployment Package

To install Elasticsearch for the PeopleSoft Search Framework, you download and deploy the Elasticsearch DPK from Oracle Software Delivery Cloud or My Oracle Support. The Elasticsearch DPK includes:

- Open-source Elasticsearch software
- PeopleSoft-developed plug-ins for Elasticsearch
- PeopleSoft-delivered customized code for Elasticsearch
- Oracle Java JRE 1.8
- Open-source Python software
- PeopleSoft-developed Python scripts for Elasticsearch deployment automation

The Elasticsearch DPK installation enables automatic setup of Elasticsearch clusters, nodes, administrator user, and proxy user. The setup script also gives you the option to upgrade a previous Elasticsearch installation.

See [Upgrading Elasticsearch on Microsoft Windows or Linux](#).

The following considerations were made when these DPKs were designed:

- System administration experience with PeopleTools is required. If you are new to the PeopleSoft system, it may be necessary to familiarize yourself with the PeopleSoft architecture before proceeding.
- System administration experience with Elasticsearch is required. If you are new to the Elasticsearch system, it may be necessary to familiarize yourself with the Elasticsearch architecture before proceeding.

## Understanding the Elasticsearch 6.1.2 Deployment Package

To install Elasticsearch for the PeopleSoft Search Framework, you download and deploy the Elasticsearch DPK from Oracle Software Delivery Cloud or My Oracle Support. The Elasticsearch DPK includes:

- Open-source Elasticsearch software
- PeopleSoft-developed plug-ins for Elasticsearch
- PeopleSoft-delivered customized code for Elasticsearch
- Oracle Java JRE 1.8
- Open-source Python software
- PeopleSoft-developed Python scripts for Elasticsearch deployment automation

The Elasticsearch DPK installation enables automatic setup of Elasticsearch clusters, nodes, administrator user, and proxy user.

The following considerations were made when these DPKs were designed:

- System administration experience with PeopleTools is required. If you are new to the PeopleSoft system, it may be necessary to familiarize yourself with the PeopleSoft architecture before proceeding.
- System administration experience with Elasticsearch is required. If you are new to the Elasticsearch system, it may be necessary to familiarize yourself with the Elasticsearch architecture before proceeding.

## Reviewing the Elasticsearch Deployment

The deployment of Elasticsearch for PeopleSoft environments includes the following high-level steps:

1. Download the Elasticsearch DPK from My Oracle Support.  
See "Deploying the Elasticsearch Deployment Package."
2. Extract the DPK zip file and run the script to deploy and set up Elasticsearch.  
See "Deploying the Elasticsearch Deployment Package."
3. Identify and apply any necessary bugs delivered with the latest PeopleSoft Update Image (PI) for your PeopleSoft application.  
See "Integrating Elasticsearch with the PeopleSoft Environment."
4. Set up the Elasticsearch instance in the PeopleSoft application.  
See "Integrating Elasticsearch with the PeopleSoft Environment."

For more information on the Elasticsearch DPKs and the PeopleSoft Search Framework, see these resources:

- For details on using Elasticsearch with the PeopleSoft Search Framework, see *PeopleTools 8.55: Search Technology*.  
See PeopleTools Elasticsearch Home Page (select Elasticsearch on PeopleTools 8.55), My Oracle Support, Doc ID 2205540.2, <https://support.oracle.com/epmos/faces/DocumentDisplay?id=2205540.2>.
- You can find the most current version of this installation documentation, *PeopleSoft Deployment Packages for Elasticsearch Installation (PeopleSoft PeopleTools 8.55)*, on the Elasticsearch home page.  
See PeopleTools Elasticsearch Home Page (select Elasticsearch on PeopleTools 8.55), My Oracle Support, Doc ID 2205540.2, <https://support.oracle.com/epmos/faces/DocumentDisplay?id=2205540.2>.
- You can find links to the most current Elasticsearch DPK, which is available in the My Oracle Support Patches & Updates area, on the Elasticsearch Home Page.  
See PeopleTools Elasticsearch Home Page (select Elasticsearch on PeopleTools 8.55), My Oracle Support, Doc ID 2205540.2, <https://support.oracle.com/epmos/faces/DocumentDisplay?id=2205540.2>.
- For additional information about using the PeopleSoft PeopleTools DPKs, see *PeopleSoft PeopleTools 8.55 Deployment Packages Installation*.  
See PeopleSoft PeopleTools Patches Home Page, My Oracle Support, Doc ID 2062712.2, <https://support.oracle.com/epmos/faces/DocumentDisplay?id=2062712.2>.

## Prerequisites

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This section discusses:

- Reviewing Hardware Prerequisites

- Reviewing Software Prerequisites
- Reviewing Elasticsearch 2.3.2 Recommendations
- Reviewing Elasticsearch 6.1.2 Recommendations

## Reviewing Hardware Prerequisites

You can install the Elasticsearch DPK directly on a system running a Linux or Microsoft Windows operating system (sometimes called "bare-metal" installation). The Elasticsearch DPK is certified to run on those Linux and Microsoft Windows operating systems that are certified for Elasticsearch for a PeopleSoft environment. The host can be a physical computer or a virtual machine.

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**Note.** Because Elasticsearch and Oracle SES have similar hardware requirements, if you previously allocated hardware for Oracle SES, you may be able to use that hardware for Elasticsearch. This is possible only if you plan to move from Oracle SES using the traditional method with production downtime. If you choose to use the new live cut-over feature to move to Elasticsearch without taking down your production environment, you cannot use the existing Oracle SES hardware for the Elasticsearch installation.

See the references in Understanding Elasticsearch for PeopleSoft Search Framework for more information.

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- Host computer

The Elasticsearch deployment packages can be installed on a Linux or Microsoft Windows host (bare metal or virtual). The recommendation is to install Elasticsearch on a server that is separate from those used for PeopleSoft installation.

- Host operating system

The host operating system must be 64-bit Oracle certified platform.

For PeopleTools 8.55.11 and higher, the Elasticsearch integration with PeopleSoft systems is supported for Microsoft Windows and Linux operating systems. For current support information for Elasticsearch, see My Oracle Support.

See My Oracle Support, Certifications.

See PeopleSoft PeopleTools Certifications, My Oracle Support, Doc ID 747587.1, for help searching PeopleSoft Certifications.

- RAM (Memory)

Oracle recommends a minimum of 32 GB available RAM for running an Elasticsearch environment, and preferably 64 GB.

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**Note.** See the information on heap size in the section Reviewing Elasticsearch Recommendations.

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- Disk space

A minimum of 100 GB free disk space is required for the Elasticsearch deployed environment.

- CPU

A minimum of 4 CPUs is recommended.

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**Note.** Choose a modern processor with multiple cores. If you need to choose between faster CPUs or more cores, choose more cores. The extra concurrency that multiple cores offers will far outweigh a slightly faster clock speed.

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## Reviewing Software Prerequisites

Here are the software requirements for using the Elasticsearch DPK:

- PeopleSoft environment with Elasticsearch 2.3.2
  - The Elasticsearch 2.3.2 integration is supported for PeopleSoft 9.2 applications on PeopleSoft PeopleTools 8.55.11 or higher patch level.  
If you are on a lower patch level, you must upgrade to PeopleTools 8.55.11 or higher patch level.
  - The Elasticsearch DPKs are updated regularly to incorporate the latest JRE.  
Elasticsearch DPKs are released concurrently with PeopleTools patches, but are not dependent on the PeopleTools patch release. For the most part, you can use the Elasticsearch DPKs with earlier PeopleTools patches, as long as the PeopleTools patch level is greater than the minimum patch level listed on My Oracle Support Certifications. See the notes for Elasticsearch in the certifications for PeopleTools 8.55. There is one exception to this statement. On PeopleSoft PeopleTools 8.55.19 or later, the minimum supported/required Elasticsearch DPK version is DPK04 (Elasticsearch 2.3.2\_04 DPK).
  - Oracle recommends that you use the Elasticsearch 2.3.2 DPK corresponding to the latest PeopleTools patch release to take advantage of the latest fixes and features.  
See the Elasticsearch home page for up-to-date information on features and fixes that require specific PeopleTools patch releases.  
See PeopleTools Elasticsearch Home Page, My Oracle Support, Doc ID 2205540.2.
  - To upgrade an Elasticsearch 2.3.2 installation to the latest DPK, follow the instructions for upgrading Elasticsearch on Linux or Windows in this documentation.  
Existing Elasticsearch indexes will not be impacted if you upgrade using these instructions. These upgrade instructions apply only to upgrading one Elasticsearch 2.3.2 DPK installation to a later version. You cannot upgrade from the Elasticsearch 2.3.2 DPK to the Elasticsearch 6.1.2 DPK using these instructions.
- PeopleSoft environment with Elasticsearch 6.1.2
  - The Elasticsearch 6.1.2 integration is supported for PeopleSoft 9.2 applications on PeopleSoft PeopleTools 8.55.26 or higher patch level.  
If you are on a lower patch level, you must upgrade to PeopleTools 8.55.26 or higher patch level to use the Elasticsearch 6.1.2 DPK.
  - The Elasticsearch DPKs are updated regularly to incorporate the latest JRE. Elasticsearch DPKs are released concurrently with PeopleTools patches, but are not dependent on the PeopleTools patch release. You can use the Elasticsearch DPKs with previous PeopleTools patch, as long as the PeopleTools patch level is greater than the minimum patch level listed on My Oracle Support Certifications.
  - Oracle recommends that you use the Elasticsearch 6.1.2 DPK for the latest PeopleTools patch release to take advantage of the latest fixes and features.  
See the Elasticsearch home page for up-to-date information on features and fixes that require specific PeopleTools patch releases.  
See PeopleTools Elasticsearch Home Page, My Oracle Support, Doc ID 2205540.2.
- Secure Shell (ssh) client  
You need an SSH client to connect to the host for any PeopleSoft administrative tasks post-environment setup.
- Puppet Open Source software  
In the current release, Puppet software is delivered with the Elasticsearch DPK, but is not installed automatically. In earlier revisions of the Elasticsearch DPK, the Puppet software was usually installed by the Elasticsearch DPK. Puppet software is not required to run Elasticsearch, but if necessary, you can install it for

Microsoft Windows and Linux operating systems using the `psft-dpk-puppet-setup` scripts.

See "Using the Supplemental Elasticsearch DPK Setup Scripts."

For those cases where you need to install Puppet directly, you can download the open-source software from the Puppet Labs Web site at [www.puppetlabs.com](http://www.puppetlabs.com).

- Zip utility

You need a utility that can extract (`unzip`) the DPK zip file on your operating system.

- Microsoft Windows PowerShell

The DPK setup script for the Elasticsearch DPK is a batch file, and Microsoft Windows PowerShell is not required.

See "Deploying the Elasticsearch Deployment Package."

The installation using the supplemental Elasticsearch DPK setup script on Microsoft Windows does require Windows PowerShell.

See "Using the Supplemental Elasticsearch DPK Setup Scripts."

## Reviewing Elasticsearch 2.3.2 Recommendations

These specifications apply to the computer where you install the Elasticsearch 2.3.2 DPK.

- Heap size

To adjust memory usage, you can specify the heap size in Elasticsearch by setting an environment variable called `ES_HEAP_SIZE`. When the server process starts, it will read this environment variable and set the heap accordingly. For example, to set the heap size to 10 GB use the following command.

On Linux:

```
export ES_HEAP_SIZE=10G
```

On Microsoft Windows:

```
SET ES_HEAP_SIZE=10G
```

The standard recommendation is to give 50% of the available memory to the Elasticsearch heap, while leaving the other 50% free. The memory is used by Lucene for caching in-memory data structures. As a standard practice never set the heap size greater than 30 GB, as setting a higher value would not use JAVA compressed pointers, wastes memory, reduces CPU performance, and makes the garbage collection (GC) struggle with large heaps.

- Swapping

Disable swapping. Swapping is expensive in terms of memory required, and thus affects performance.

You can disable swapping on Linux temporarily by running: `sudo swapoff -a`. To disable it permanently, you will need to edit the `/etc/fstab` file and comment out any lines that contain the word "swap."

You can disable swapping on Microsoft Window by disabling the paging file entirely. For example, select System Properties, Advanced. Click the Settings button in the Performance area. Select Advanced, Virtual memory, and change the value for the paging file. Alternatively, you can set the `sysctl` value `vm.swappiness` to 1.

If disabling swapping completely is not an option, you can decrease the "swappiness" value. This value controls how aggressively the operating system (OS) tries to swap memory. This prevents swapping under normal circumstances, but still allows the OS to swap under emergency memory situations. A swappiness of 1 is better than 0, since on some kernel versions a swappiness of 0 can invoke the out-of-memory (OOM) killer. If neither approach is possible, you should enable `mlockall` file. This allows the JVM to lock its memory and prevent it from being swapped by the OS. The recommendation is to set this parameter to true.

To enable this parameter, set this value in the `elasticsearch.yml` configuration file:

```
bootstrap.mlockall: true
```

See "Performing Additional Tasks," Modifying the Elasticsearch Configuration File (Optional).

- Type of disk drive

Solid-state drives (SSDs) are by far superior to any spinning media. SSD-backed nodes see boosts in both query and indexing performance. If you choose to use SSDs, the I/O scheduling should be set to `Deadline/noop` for optimal utilization of SSDs and increased performance.

If you use spinning media, try to obtain the fastest disks possible (high-performance server disks, 15k RPM drives). Using RAID 0 is an effective way to increase disk speed, for both spinning disks and SSDs. There is no need to use mirroring or parity variants of RAID, since high availability is built into Elasticsearch via replicas. Avoid network-attached storage (NAS). NAS is often slower, displays larger latencies with a wider deviation in average latency, and is a single point of failure.

- File Descriptors and MMAP

Lucene uses a very large number of files. You should increase your file descriptor count to something very large, such as 64,000. Elasticsearch uses a mix of new IO File system (NioFS) and memory-mapped file system (MMapFS) for the various files. Ensure that you configure the maximum map count so that there is ample virtual memory available for mmapped files. This can be set by modifying `vm.max_map_count` in `/etc/sysctl.conf`; for example, `vm.max_map_count =262144`.

## Reviewing Elasticsearch 6.1.2 Recommendations

These specifications apply to the computer where you install the Elasticsearch 6.1.2 DPK.

- Elasticsearch prerequisites

Before installing the Elasticsearch DPK, review the prerequisites on the Elasticsearch web site. Elasticsearch has strict bootstrap validations. If you do not fulfill the prerequisites, the Elasticsearch instance may not start.

See [Bootstrap Checks](https://www.elastic.co/guide/en/elasticsearch/reference/6.1/bootstrap-checks.html), Elastic Docs web site,

<https://www.elastic.co/guide/en/elasticsearch/reference/6.1/bootstrap-checks.html>.

- Heap size

To adjust memory usage after installation, you can adjust the memory settings in the `jvm.options` properties file. Locate the `jvm.options` file in the config directory under the installation directory, and modify the values for `Xms` and `Xmx`.

`Xms` represents the initial size of the total heap space.

`Xmx` represents the maximum size of the total heap space.

The standard recommendations are to set `Xms` and `Xmx` to the same value, and to give 50% of the available memory to the Elasticsearch heap, while leaving the other 50% free. The memory is used by Lucene for caching in-memory data structures. As a standard practice never set the heap size greater than 30 GB, as setting a higher value would not use JAVA compressed pointers, wastes memory, reduces CPU performance, and makes the garbage collection (GC) struggle with large heaps.

For example, if the available memory is 20 GB, set both `Xms` and `Xmx` to 10 GB:

```
-Xms10g
-Xmx10g
```

After you modify the `jvm.options` file, start and stop Elasticsearch.

See "Performing Additional Tasks," Starting and Stopping an Elasticsearch 6.1.2 Service.

- Swapping

Disable swapping. Swapping is expensive in terms of memory required, and thus affects performance.

You can disable swapping on Linux temporarily by running: `sudo swapoff -a`. To disable it permanently, you will need to edit the `/etc/fstab` file and comment out any lines that contain the word "swap."

You can disable swapping on Microsoft Windows by disabling the paging file entirely. For example, select System Properties, Advanced. Click the Settings button in the Performance area. Select Advanced, Virtual memory, and change the value for the paging file. Alternatively, you can set the `sysctl` value `vm.swappiness` to 1.

If disabling swapping completely is not an option, you can decrease the "swappiness" value. This value controls how aggressively the operating system (OS) tries to swap memory. This prevents swapping under normal circumstances, but still allows the OS to swap under emergency memory situations. A swappiness of 1 is better than 0, since on some kernel versions a swappiness of 0 can invoke the out-of-memory (OOM) killer. If neither approach is possible, you should enable `mlockall` file. This allows the JVM to lock its memory and prevent it from being swapped by the OS. The recommendation is to set this parameter to true. To enable this parameter, set this value in the `elasticsearch.yml` configuration file:

```
bootstrap.mlockall: true
```

See "Performing Additional Tasks," Modifying the Elasticsearch Configuration File (Optional).

- Type of disk drive

Solid-state drives (SSDs) are by far superior to any spinning media. SSD-backed nodes see boosts in both query and indexing performance. If you choose to use SSDs, the I/O scheduling should be set to Deadline/noop for optimal utilization of SSDs and increased performance.

If you use spinning media, try to obtain the fastest disks possible (high-performance server disks, 15k RPM drives). Using RAID 0 is an effective way to increase disk speed, for both spinning disks and SSDs. There is no need to use mirroring or parity variants of RAID, since high availability is built into Elasticsearch via replicas. Avoid network-attached storage (NAS). NAS is often slower, displays larger latencies with a wider deviation in average latency, and is a single point of failure.

- File Descriptors and MMAP

Lucene uses a very large number of files. You should increase your file descriptor count to something very large, such as 64,000. Elasticsearch uses a mix of new IO File system (NioFS) and memory-mapped file system (MMapFS) for the various files. Ensure that you configure the maximum map count so that there is ample virtual memory available for mmapped files. This can be set by modifying `vm.max_map_count` in `/etc/sysctl.conf`; for example, `vm.max_map_count = 262144`.

## **Task 1-1: Reviewing Elasticsearch Installation Use Cases**

This section discusses:

- Use Case 1 - Install the PeopleSoft Application and Elasticsearch
- Use Case 2 - Transition from Existing Oracle SES to Elasticsearch
- Use Case 3 - Transition from Oracle SES to Elasticsearch without Extensive Downtime

### **Task 1-1-1: Use Case 1 - Install the PeopleSoft Application and Elasticsearch**

The first use case assumes the following:

- You are installing a PeopleSoft 9.2 application.

For a new installation you can start using Elasticsearch directly. The PeopleSoft application must include the appropriate fixes for Elasticsearch, as delivered with the latest PeopleSoft Update Image.

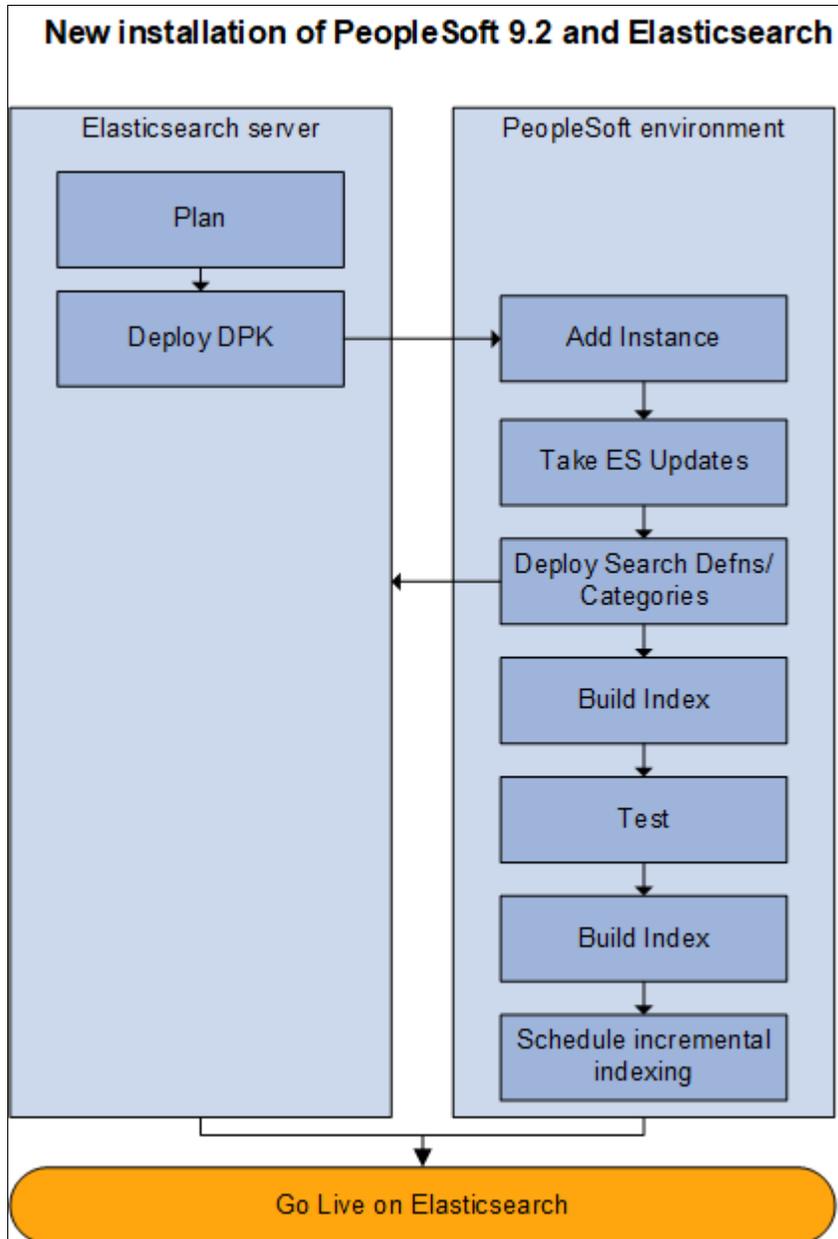
See PeopleSoft Applications: Elasticsearch Updates and Fixes, My Oracle Support, Doc ID 2181988.1.

- The PeopleSoft application is on PeopleSoft PeopleTools 8.55.11 or higher patch level.

**Note.** Oracle recommends that you use the latest PeopleTools patch release to take advantage of the latest fixes and features.

- You want to use Elasticsearch 2.3.2 for the PeopleSoft Search Framework.

This diagram illustrates the first use case, to install Elasticsearch directly for a new installation:



Use Case 1 - New installation of PeopleSoft 9.2 and Elasticsearch

This table describes the steps in the diagram for the first use case, to install Elasticsearch directly for a new installation:

Task	Description
Plan	<p>Estimate resource requirements and review settings needed for the host on which you install Elasticsearch.</p> <p>See "Prerequisites."</p>
Deploy DPK	<p>Deploy the Elasticsearch DPK and run the configuration script on a Microsoft Windows or Linux host.</p> <p>See "Deploying the Elasticsearch Deployment Package."</p>
Add Instance	<p>Sign into PIA in the PeopleSoft application to create and verify a search instance for Elasticsearch.</p> <p>See "Integrating Elasticsearch with the PeopleSoft Environment," Adding and Configuring an Elasticsearch Instance.</p>
Take ES Updates.	<p>Download and deploy the current PeopleSoft Update Image (PI) for the PeopleSoft application. The latest PI will include features and fixes required to use Elasticsearch for the PeopleSoft Search Framework. Apply the fixes to any PeopleSoft environment that will integrate with Elasticsearch.</p> <p>See "Integrating Elasticsearch with the PeopleSoft Environment," Applying PeopleSoft Application Support Bugs for Elasticsearch.</p>
Deploy Search Defns/Categories	<p>For the Elasticsearch instance deploy the Search Definitions and Search Categories.</p> <p>See <i>PeopleTools 8.55: Search Technology</i>, "Administering Search Definitions and Search Categories."</p>
Build index	<p>Build PeopleSoft search indexes on Elasticsearch. Perform a full crawl; that is, a build of type Full index.</p> <p>See <i>PeopleTools 8.55: Search Technology</i>, "Administering PeopleSoft Search Framework," Working with Search Indexes, Building Search Indexes.</p>
Test	<p>Perform acceptance testing.</p> <p>See <i>PeopleTools 8.55: Search Technology</i>, "Working with PeopleSoft Search Framework Utilities," Using the Search Test Page.</p>

Task	Description
Build index	Repeat the full index build.  This step is required if you are using a different Elasticsearch server in production than the one that you used for testing, for example.  See <i>PeopleTools 8.55: Search Technology</i> , "Administering PeopleSoft Search Framework," Working with Search Indexes, Building Search Indexes.
Schedule incremental indexing	To keep the search indexes current, schedule regular search index builds of type Incremental index.  See <i>PeopleTools 8.55: Search Technology</i> , "Administering PeopleSoft Search Framework," Working with Search Indexes, Building Search Indexes.
Go Live on Elasticsearch	Notify users.

## Task 1-1-2: Use Case 2 - Transition from Existing Oracle SES to Elasticsearch

The second use case assumes the following:

- You have a PeopleSoft 9.2 application.

The PeopleSoft application must include the appropriate fixes for Elasticsearch, as delivered with the latest PeopleSoft Update Image.

See PeopleSoft Applications: Elasticsearch Updates and Fixes, My Oracle Support, Doc ID 2181988.1.

If you are upgrading to a PeopleSoft 9.2 application from an environment with Oracle SES already set up, you have the alternative to continue running Oracle SES on a production environment, and set up Elasticsearch on a non-production environment. You may choose this route, for example, in order to work on the PeopleSoft Search Framework on the non-production environment before moving to Elasticsearch on the production environment.

- The PeopleSoft application is on PeopleSoft PeopleTools 8.55.11 or higher patch level.

---

**Note.** Oracle recommends that you use the latest PeopleTools patch release to take advantage of the latest fixes and features.

---

- The production environment is using Oracle SES for the PeopleSoft Search Framework.
- You will create a non-production environment with Elasticsearch to carry out acceptance testing.

---

**Note.** The diagram below assumes that the non-production PeopleSoft environment uses a non-production Elasticsearch server.

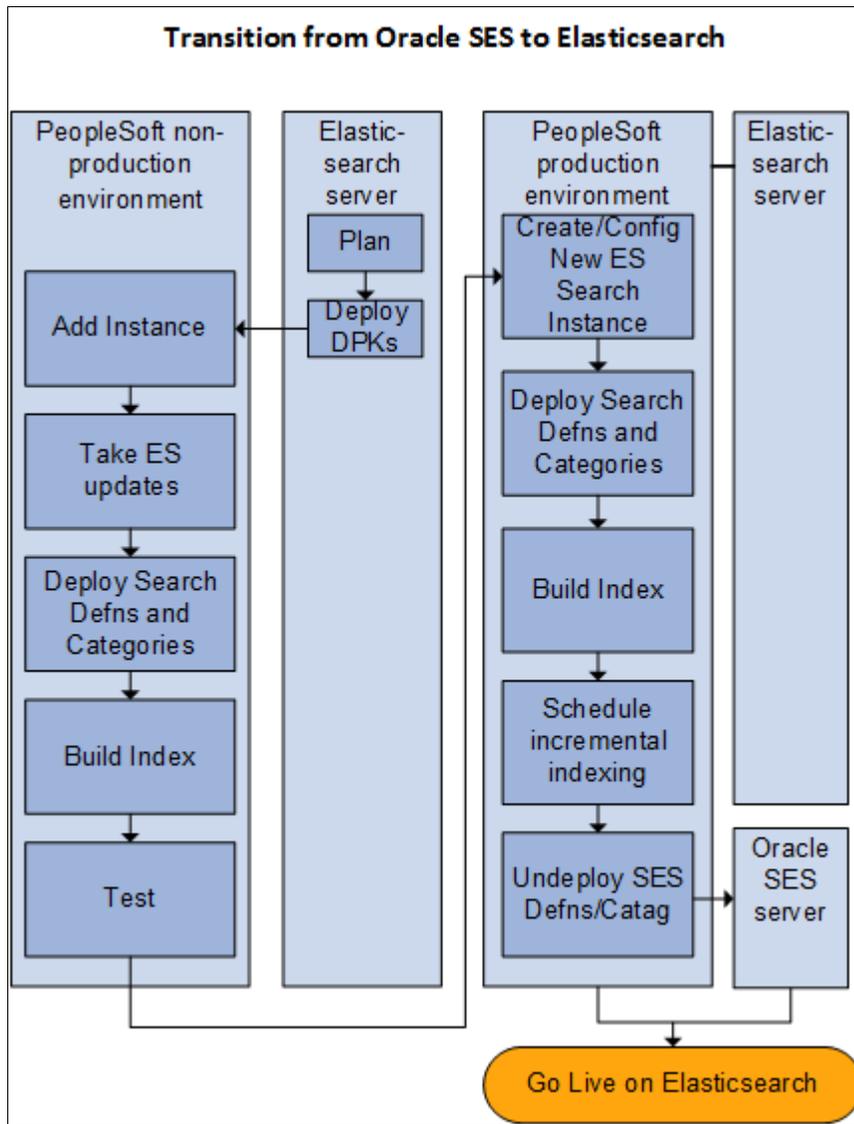
---

- You will schedule downtime to decommission the production environment, using Oracle SES, and begin using Elasticsearch.

For complete instructions for this use case, see *Moving from SES to Elasticsearch*. On the Elasticsearch Home Page, select the tab Elasticsearch on PeopleTools 8.55. The document is found in the section *Moving from SES to Elasticsearch on PeopleTools 8.55*.

See Moving from SES to Elasticsearch, Elasticsearch Home Page, My Oracle Support, Doc ID 2205540.2.

This diagram illustrates the second use case, to transition from an existing Oracle SES installation to Elasticsearch:



Use Case 2 - Transition from Oracle SES to Elasticsearch

This table describes the steps in the diagram for the second use case, to transition from an existing Oracle SES installation to Elasticsearch.

Task	Description
Plan	Estimate resource requirements and review settings needed for the host on which you install Elasticsearch.  See "Prerequisites."

Task	Description
Deploy DPK	<p>Deploy the Elasticsearch DPK and run the configuration script on a Microsoft Windows or Linux host.</p> <p>See "Deploying the Elasticsearch Deployment Package."</p>
Add Instance	<p>Sign into PIA in the PeopleSoft application to create and verify a search instance for Elasticsearch.</p> <p>See "Integrating Elasticsearch with the PeopleSoft Environment," Adding and Configuring an Elasticsearch Instance.</p>
Take ES Updates	<p>On the non-production environment, download and deploy the current PeopleSoft Update Image (PI) for the PeopleSoft application. The latest PI will include features and fixes required to use Elasticsearch for the PeopleSoft Search Framework. Apply the fixes to any PeopleSoft environment that will integrate with Elasticsearch.</p> <p>See "Integrating Elasticsearch with the PeopleSoft Environment," Applying PeopleSoft Application Support Bugs for Elasticsearch in this documentation.</p>
Deploy Search Defns and Categories	<p>For the Elasticsearch instance on the non-production environment, deploy the Search Definitions and Search Categories.</p> <p>See <i>PeopleTools 8.55: Search Technology</i>, "Administering Search Definitions and Search Categories."</p>
Build	<p>On the non-production environment, build PeopleSoft search indexes on Elasticsearch. Perform a full crawl; that is, a build of type Full index.</p> <p>See <i>PeopleTools 8.55: Search Technology</i>, "Administering PeopleSoft Search Framework," Working with Search Indexes, Building Search Indexes.</p>
Test	<p>On the non-production environment, perform acceptance testing of the Elasticsearch instance.</p> <p>See <i>PeopleTools 8.55: Search Technology</i>, "Working with PeopleSoft Search Framework Utilities," Using the Search Test Page.</p>
Create/Config New ES Search Instance	<p>Create and configure a new Elasticsearch instance on the production environment.</p> <p>Perform a round-trip test for the Elasticsearch instance to verify that the properties defined on the Search Instance page are working correctly with Integration Broker for Elasticsearch.</p> <p>See <i>PeopleTools 8.55: Search Technology</i>, "Administering PeopleSoft Search Framework," Administering Search Instances.</p>

Task	Description
Deploy Search Defns and Categories	For the Elasticsearch instance on the production environment, deploy the Search Definitions and Search Categories.  See <i>PeopleTools 8.55: Search Technology</i> , "Administering Search Definitions and Search Categories."
Build index	Repeat the full build of indexes on the production environment.  See <i>PeopleTools 8.55: Search Technology</i> , "Administering PeopleSoft Search Framework," Working with Search Indexes, Building Search Indexes.
Schedule incremental indexing	To keep the search indexes current, schedule regular search index builds of type Incremental index.  See <i>PeopleTools 8.55: Search Technology</i> , "Administering PeopleSoft Search Framework," Working with Search Indexes, Building Search Indexes.
Go Live on Elasticsearch	Notify users.
Undeploy SES Defns/Categ	For the Oracle SES instance on the production environment, undeploy the Search Definitions and Search Categories.  See <i>PeopleTools 8.55: Search Technology</i> , "Administering Search Definitions and Search Categories."

### Task 1-1-3: Use Case 3 - Transition from Oracle SES to Elasticsearch without Extensive Downtime

The third use case assumes the following:

- You have a PeopleSoft 9.2 application.  
 The PeopleSoft application must include the appropriate fixes for Elasticsearch, as delivered with the latest PeopleSoft Update Image.  
 See PeopleSoft Applications: Elasticsearch Updates and Fixes, My Oracle Support, Doc ID 2181988.1.
- The PeopleSoft application is on PeopleSoft PeopleTools 8.55.11 or higher patch level.

---

**Note.** Oracle recommends that you use the latest PeopleTools patch release to take advantage of the latest fixes and features.

---

- The environment is using Oracle SES for the PeopleSoft Search Framework.
- You deploy, configure, and test Elasticsearch with the same environment and at the same time that you continue using Oracle SES.

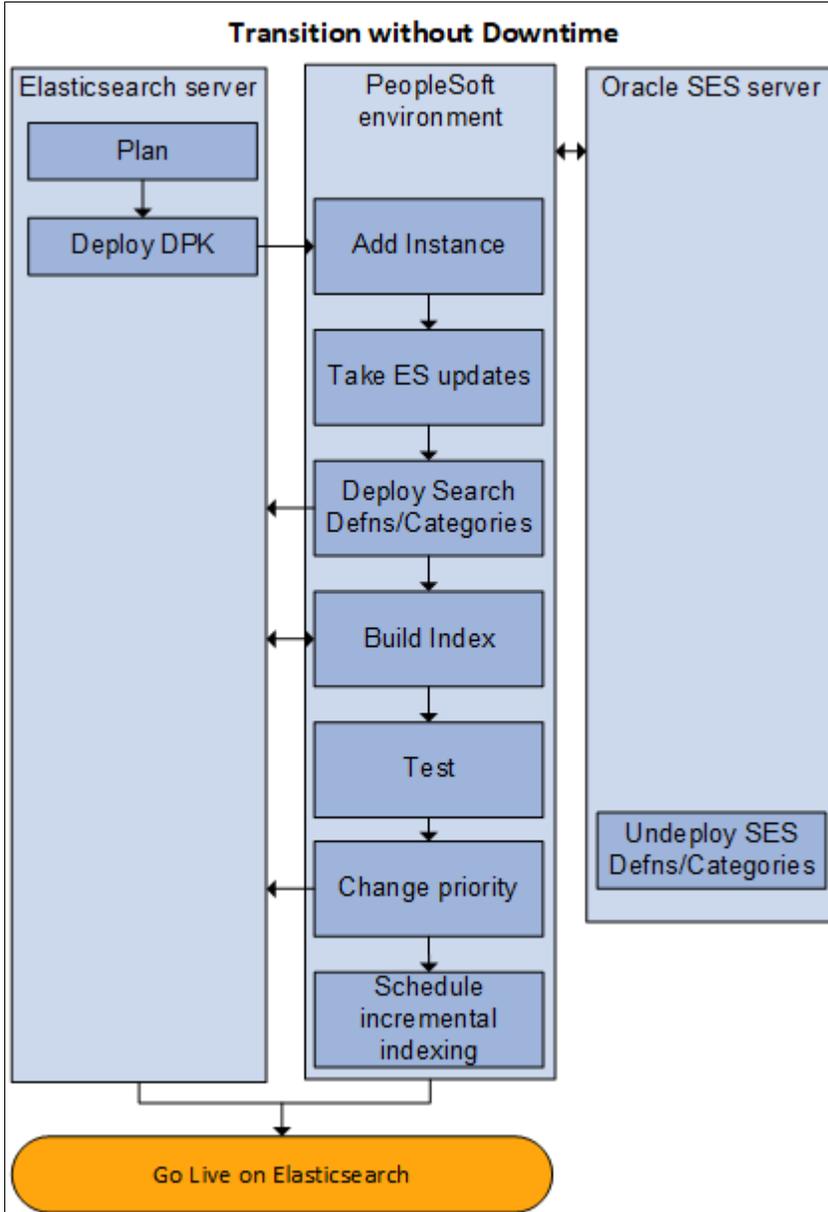
When you begin using Elasticsearch, you must perform a full crawl type of build for all indexes with type full crawl. Depending upon the data volume for your system, this could result in a long downtime. To help with this problem, the PeopleSoft Search Framework now provides a new feature called "live cutover." After your system is configured with the Elasticsearch cluster, you can go live with Oracle SES, while at the same time building the Elasticsearch indexes. Once the indexes are built, you can switch to Elasticsearch without bringing the PeopleSoft environment down.

Elasticsearch and Oracle SES search instances can co-exist for the purposes of moving from Oracle SES to Elasticsearch. This enables you to build the Elasticsearch indexes and test independently of Oracle SES.

For complete instructions for this use case, see [Moving from SES to Elasticsearch](#). On the Elasticsearch Home Page, select the tab Elasticsearch on PeopleTools 8.55. The document is found in the section Moving from SES to Elasticsearch on PeopleTools 8.55.

See [Moving from SES to Elasticsearch, Elasticsearch Home Page, My Oracle Support, Doc ID 2205540.2](#).

This diagram illustrates the third use case, to transition from an existing Oracle SES installation to Elasticsearch without extensive downtime:



Use Case 3 - Transition without Downtime

This table describes the steps in the diagram for the third use case, to transition from an existing Oracle SES installation to Elasticsearch without extensive downtime:

Task	Description
Plan	Estimate resource requirements and review settings needed for the host on which you install Elasticsearch.  See "Prerequisites."

Task	Description
Deploy DPK	<p>Deploy the Elasticsearch DPK and run the configuration script on a Microsoft Windows or Linux host.</p> <p>See "Deploying the Elasticsearch Deployment Package."</p>
Add Instance	<p>Sign into PIA in the PeopleSoft application to create and verify a search instance for Elasticsearch.</p> <p>See "Integrating Elasticsearch with the PeopleSoft Environment," Adding and Configuring an Elasticsearch Instance.</p>
Take ES Updates	<p>Download and deploy the current PeopleSoft Update Image (PI) for the PeopleSoft application. The latest PI will include features and fixes required to use Elasticsearch for the PeopleSoft Search Framework. Apply the fixes to any PeopleSoft environment that will integrate with Elasticsearch.</p> <p>See "Integrating Elasticsearch with the PeopleSoft Environment," Applying PeopleSoft Application Support Bugs for Elasticsearch.</p>
Deploy Search Defn/Categories	<p>For the Elasticsearch instance, deploy the Search Definitions and Search Categories.</p> <p>See <i>PeopleTools 8.55: Search Technology</i>, "Administering Search Definitions and Search Categories."</p>
Build Index	<p>Build PeopleSoft search indexes on Elasticsearch. Perform a full crawl; that is, a build of type Full index.</p> <p>See <i>PeopleTools 8.55: Search Technology</i>, "Administering PeopleSoft Search Framework," Working with Search Indexes, Building Search Indexes.</p>
Test	<p>Perform acceptance testing</p> <p>See <i>PeopleTools 8.55: Search Technology</i>, "Working with PeopleSoft Search Framework Utilities," Using the Search Test Page.</p>
Change priority	<p>Move all users to the Elasticsearch instance by making it the highest priority, and perform a round-trip test to ensure connectivity to Elasticsearch.</p> <p>See Moving from SES to Elasticsearch, Elasticsearch Home Page, My Oracle Support, Doc ID 2205540.2.</p>
Undeploy SES Defns/Categories	<p>For the Oracle SES instance, undeploy the Search Definitions and Search Categories.</p> <p>See <i>PeopleTools 8.55: Search Technology</i>, "Administering Search Definitions and Search Categories."</p>

<b>Task</b>	<b>Description</b>
Schedule incremental indexing	Schedule incremental indexing for the Elasticsearch instance. To keep the search indexes current, schedule regular search index builds of type Incremental index.  See <i>PeopleTools 8.55: Search Technology</i> , "Administering PeopleSoft Search Framework," Working with Search Indexes.
Go Live on Elasticsearch	Go live on Elasticsearch and notify users.

## Chapter 2

# Deploying the Elasticsearch 2.3.2 Deployment Package

This chapter discusses:

- Obtaining the Elasticsearch 2.3.2 DPK
- Installing Elasticsearch 2.3.2 on Linux
- Installing Elasticsearch 2.3.2 on Microsoft Windows
- Upgrading Elasticsearch 2.3.2 on Linux
- Upgrading Elasticsearch 2.3.2 on Microsoft Windows

## **Task 2-1: Obtaining the Elasticsearch 2.3.2 DPK**

---

This section discusses:

- Obtaining the Elasticsearch 2.3.2 DPK from Oracle Software Delivery Cloud
- Obtaining the Elasticsearch 2.3.2 DPK from My Oracle Support

### **Task 2-1-1: Obtaining the Elasticsearch 2.3.2 DPK from Oracle Software Delivery Cloud**

To obtain the Elasticsearch DPK from Oracle Software Delivery Cloud:

1. Sign in to Oracle Software Delivery Cloud.  
See Oracle Software Delivery Cloud, <https://edelivery.oracle.com>.
2. Search for the current PeopleSoft PeopleTools release, and select Microsoft Windows or Linux as the Platform.
3. Locate Elasticsearch in the search results.
4. Download the Elasticsearch file, for example V123456-01.zip.

Be sure that the directory where you download the zip file, referred to as *ES\_INSTALL* in this documentation, has adequate available space. The directory should be a newly created directory with no other files present.

### **Task 2-1-2: Obtaining the Elasticsearch 2.3.2 DPK from My Oracle Support**

To obtain the Elasticsearch DPK from My Oracle Support:

1. Sign in to My Oracle Support.  
See My Oracle Support, <https://support.oracle.com>.

2. Select the Patches & Updates tab.
3. Select Product or Family (Advanced), and search for PeopleSoft PeopleTools.  
Specify the current release.
4. In the list of results, locate the Elasticsearch file for your operating system, ELASTICSEARCH-DPK-*<Operating\_System>*-*<Release.Patch>*-*<DPK\_revision>*.zip, where the file name includes the following:
  - *<Operating\_System>* is LNX for Oracle Linux, or WIN for Microsoft Windows.
  - *<Release.Patch>* is the release and patch number for the product, such as 2.3.2.
  - *<DPK\_revision>* is a number specific to the DPK revision. The examples in this documentation use *xx* to represent the DPK revision number.

For example, ELASTICSEARCH-DPK-WIN-2.3.2\_XX.zip or ELASTICSEARCH-DPK-LNX-2.3.2\_XX.zip.

5. Download the file.

Be sure that the directory where you download the zip file, referred to as *ES\_INSTALL* in this documentation, has adequate available space. The directory should be a newly created directory with no other files present.

## Task 2-2: Installing Elasticsearch 2.3.2 on Linux

---

This section discusses:

- Deploying the Elasticsearch 2.3.2 DPK on a Linux Host
- Verifying the Elasticsearch 2.3.2 Installation on Linux
- Performing Post-Installation Steps on Linux
- Removing the Elasticsearch 2.3.2 Installation from Linux

### Task 2-2-1: Deploying the Elasticsearch 2.3.2 DPK on a Linux Host

The Elasticsearch DPK deployment creates an Elasticsearch cluster with one or more Elasticsearch nodes. Briefly, an Elasticsearch node refers to the server where Elasticsearch is installed, and the cluster is comprised of nodes which all have the same cluster name. The DPK setup script asks for the cluster name and the names of existing nodes. If you provide an existing cluster name and list of existing nodes, the existing nodes will join the cluster. For information on adding additional nodes after installation, see the section Adding Additional Elasticsearch Nodes.

See "Performing Additional Tasks," Adding Additional Elasticsearch Nodes.

For information on Elasticsearch concepts mentioned in this task, such as clusters and nodes, see the PeopleTools product documentation and the Elasticsearch online help.

See *PeopleTools: Search Technology*.

See Elasticsearch online help, <https://www.elastic.co/guide/en/elasticsearch/guide/current/index.html>.

When using the `psft-dpk-setup.sh` script to deploy the Elasticsearch DPK:

- Root access is not a requirement.
- The installation and configuration do not require Puppet software, and the script does not install it.

---

**Note.** If you need to install the Puppet software for your environment, see the appendix "Using the Supplemental DPK Setup Scripts."

---

- The Elasticsearch DPK setup script does not create the user "esuser," which was associated with the Puppet-

based installation.

The user who installs the Elasticsearch DPK owns all the Elasticsearch files, and only that user will be able to start the process.

Use this procedure on physical or virtual Linux hosts. This procedure assumes:

- You have downloaded the required Elasticsearch DPK for Linux, and saved it in a newly created directory accessible to the Linux host, referred to as *ES\_INSTALL*.
- There is enough space on the Linux host for the Elasticsearch installation and your estimated indexing requirements.

Make a note of the values you supply for ports, passwords, and so on. When you configure the Elasticsearch instance for PeopleSoft, the values must match those specified here.

1. Open a terminal window.
2. Change directory to *ES\_INSTALL*.

```
cd ES_INSTALL
```

3. Extract the entire contents of the zip file (for example, ELASTICSEARCH-DPK-LNX-2.3.2\_XX.zip or V123456-01.zip) in the same directory, *ES\_INSTALL*.

```
unzip ELASTICSEARCH-DPK-LNX-2.3.2_XX.zip
```

---

**Note.** It is a good idea to extract into the same directory where you downloaded the zip files, and to extract into an empty directory for each new installation.

---

The extraction creates the following directories in *ES\_INSTALL*:

- setup directory — includes the setup scripts
  - puppet directory — includes the open-source Puppet software for optional installation
  - archives directory — includes archives for deployment
  - readme.txt file
  - elasticsearch-manifest file — includes the version information about Elasticsearch and JRE provided in the DPK.
4. Change directory to *ES\_INSTALL/setup*.
  5. Run the DPK setup script as follows:
 

```
./psft-dpk-setup.sh --install --install_base_dir BASE_DIR
```

    - For the *install\_base\_dir* option, specify the full path where you want Elasticsearch installed. The installation directory is referred to in this documentation as *BASE\_DIR*. For example:
 

```
./psft-dpk-setup.sh --install --install_base_dir /home/es232
```
    - Use double-dashes when specifying the script options; for example, `--install`.
  6. Answer *y* (yes) to continue the installation, or *n* (no) to exit.

```
You've chosen to do a fresh installation of Elasticsearch. Do you want to
to
continue with your choice? (y/n): y
```

7. Enter the password two times for the Elasticsearch administrative user *esadmin*, at the following prompt. The *esadmin* user is used to authenticate requests on Elasticsearch.

---

**Note.** The esadmin user is not the same as the user who installs the Elasticsearch DPK and owns the files.

---

```
Enter the password for esadmin.
Re-enter the password for esadmin:
```

8. Enter the password for the Elasticsearch proxy user, people.

Note that this is not the same user as the PeopleSoft connect ID, which also has people as the default value.

```
Enter the password for people.
Re-enter the password for people:
```

9. Enter the name for the Elasticsearch cluster, or accept the default name, ESCLUSTER.

```
Enter the ES cluster name [ ESCLUSTER ] :
```

10. Enter the Elasticsearch HTTP port.

This is the port on which Elasticsearch listens for requests. The default is 9200.

```
Enter the HTTP port for Elasticsearch [ 9200 ] :
```

11. Enter the host name for any nodes that are already members of a cluster.

```
Enter the list of discovery hosts [ ["127.0.0.1", "[::1]"] ] :
```

Be sure to use the following syntax:

- Enclose one or more host names in square brackets.
- Enclose the host name or IP address in *double quotes* (" ").
- Use commas to list two or more hosts.
- Use this as an example for one host: [ "host1.example.com" ]
- Use this as an example for more than one host: [ "host1.example.com", "127.0.0.1" ]

12. Enter the minimum number of nodes.

```
Enter the minimum number of master nodes :
```

13. Enter the location for the Elasticsearch data.

Oracle recommends that you do not use the default location, *BASE\_DIR*/pt/es2.3.2/data, with PeopleSoft environments. Instead, specify a data directory that is outside of *BASE\_DIR*/pt/es2.3.2.

```
Enter the path where you want the Elasticsearch data to reside [/home⇒
/es232/pt/es2.3.2/data ] :
```

14. Enter the location for the Elasticsearch logs.

The default location is *BASE\_DIR*/pt/es2.3.2/logs.

```
Enter the path where you want the Elasticsearch Logs to be written to [⇒
/home/es232/pt/es2.3.2/logs ] :
```

15. Enter the heap size as a number with the letter "G" as shown in this example:

See Prerequisites

```
Enter the Java Heap size for Elasticsearch [ 1G ] : 7G
```

16. Review the status messages as the script sets up the PeopleSoft environment.

```
Extracting the new ES Binary ..... [OK]
```

```

Extracting the new JRE ..... . [OK]
Setting users/roles in ES ..... [OK]
Configuring Elasticsearch ..... [OK]
Starting Elasticsearch server ... . [OK]

```

Elasticsearch Installation Completed.

A successful deployment includes the following:

- The Elasticsearch home directory is found in *BASE\_DIR/pt/es2.3.2*.
- The *ES\_HOME* environment variable is set to *BASE\_DIR/pt/es2.3.2* for the current terminal session.
- Java is installed to *BASE\_DIR/pt/es\_jre1.8.0\_yy*, where *yy* is the JRE version.
- The *JAVA\_HOME* environment variable is set to *BASE\_DIR/pt/es\_jre1.8.0\_yy* for the current terminal session.

See Performing Post-Installation Steps on Linux.

## Task 2-2-2: Verifying the Elasticsearch 2.3.2 Installation on Linux

To verify the installation, in a terminal window, ensure that the following command gives an output:

```
ps -ef | grep elas
```

After verifying the process, use one of the following methods to verify the Elasticsearch installation.

- Run a REST call.

This example uses the CURL utility for the REST call:

```
curl --user <username>:<password> -XGET http://<host>:<port>
```

For details about the correct usage for the CURL utility, see your operating system documentation.

- Open a browser and enter the following URL:

```
http://<username>:<password>@<host>:<port>/
```

For both the REST command and the browser URL, use these definitions:

- *username* — the Elasticsearch user administrator, *esadmin*
- *password* — the password you entered during the DPK setup script installation
- *host* — the Elasticsearch host name
- *port* — Elasticsearch (REST) port that you entered during the DPK setup script installation

In both cases, you should see a message similar to the following:

```

{
  "name" : "abc.abc.com",
  "cluster_name" : "ESCLUSTER",
  "version" : {
    "number" : "2.3.2",
    "build_hash" : "b9e4a6acad4008027e4038f6abed7f7dba346f94",
    "build_timestamp" : "2016-04-21T16:03:47Z",
    "build_snapshot" : false,
    "lucene_version" : "5.5.0"
  },
  "tagline" : "You Know, for Search"
}

```

```
}
```

After you complete the Elasticsearch installation, you must configure the integration with the PeopleSoft environment.

See "Integrating Elasticsearch with the PeopleSoft Environment."

### Task 2-2-3: Performing Post-Installation Steps on Linux

After you complete the Elasticsearch DPK installation, if you want to perform operations described later in this chapter, such as starting and stopping Elasticsearch, or running the `elasticsearchuser` script, perform the manual steps described in this section.

In a terminal for the current session, set the following environment variables:

- Set the value for `ES_HEAP_SIZE` to a value equal to or less than 50% of available memory, and not exceeding 30G.

Enter a number followed by the letter "G"; for example:

```
export ES_HEAP_SIZE= 7G
```

- Set `JAVA_HOME` to the location installed by the DPK setup script. In this example `yy` is the JRE version:

```
export JAVA_HOME= BASE_DIR/pt/es_jre1.8.0_yy
```

### Task 2-2-4: Removing the Elasticsearch 2.3.2 Installation from Linux

Use these steps to remove the Elasticsearch DPK installation from a Linux host:

---

**Note.** You must use the manual steps. There is no cleanup option for the `psft-dpk-setup.sh` script.

---

1. Use the following command to determine the Elasticsearch process ID (pid):

```
ps -ef | grep elastic
```

2. Stop the process, substituting the Elasticsearch process ID for `<pid>`:

```
kill <pid>
```

3. Remove the Elasticsearch installation directories.

### Task 2-3: Installing Elasticsearch 2.3.2 on Microsoft Windows

---

This section discusses:

- Deploying the Elasticsearch 2.3.2 DPK on a Microsoft Windows Host
- Verifying the Elasticsearch 2.3.2 Installation on Microsoft Windows
- Performing Post-Installation Steps on Microsoft Windows
- Removing the Elasticsearch 2.3.2 Installation from Microsoft Windows

## Task 2-3-1: Deploying the Elasticsearch 2.3.2 DPK on a Microsoft Windows Host

The Elasticsearch DPK deployment creates an Elasticsearch cluster with one or more Elasticsearch nodes. Briefly, an Elasticsearch node refers to the server where Elasticsearch is installed, and the cluster is comprised of nodes which all have the same cluster name. The DPK setup script asks for the cluster name and the names of existing nodes. If you provide an existing cluster name and list of existing nodes, the existing nodes will join the cluster. For information on adding additional nodes after installation, see the section Adding Additional Elasticsearch Nodes.

See "Performing Additional Tasks," Adding Additional Elasticsearch Nodes.

For information on Elasticsearch concepts mentioned in this task, such as clusters and nodes, see the PeopleTools product documentation and the Elasticsearch online help.

See *PeopleTools: Search Technology*.

See Elasticsearch online help, <https://www.elastic.co/guide/en/elasticsearch/guide/current/index.html>.

When using the psft-dpk-setup.bat script to deploy the Elasticsearch DPK:

- You do not have to run the Elasticsearch DPK setup script as an administrator.
- The installation and configuration do not require Puppet software, and the script does not install it.

---

**Note.** If you need to install the Puppet software for your environment, see the appendix "Using the Supplemental DPK Setup Scripts."

---

- The Elasticsearch DPK setup script does not create the user "esuser," which was associated with the Puppet-based installation.

The user who installs the Elasticsearch DPK owns all the Elasticsearch files, and only that user will be able to start the process.

Use this procedure on physical or virtual Microsoft Windows hosts. This procedure assumes that:

- You have downloaded the required Elasticsearch DPK for Microsoft Windows, and saved it in a newly created directory accessible to the Microsoft Windows host, referred to as *ES\_INSTALL*.
- There is enough space on the host for the Elasticsearch installation and your estimated indexing requirements.

Make a note of the values you supply for ports, passwords, and so on. When you configure the Elasticsearch instance for PeopleSoft, the values must match those specified here.

1. Go to *ES\_INSTALL*.
2. Extract the entire contents of the zip file (for example, ELASTICSEARCH-DPK-WIN-2.3.2\_XX.zip or V123456-01.zip) in the same directory, *ES\_INSTALL*.

---

**Note.** It is a good idea to extract into the same directory where you downloaded the zip files, and to extract into an empty directory for each new installation.

---

The extraction creates the following directories in *ES\_INSTALL*:

- setup directory — includes the setup scripts
- puppet directory — includes the open-source Puppet software for optional installation
- archives directory — includes archives for deployment
- readme.txt file

- `elasticsearch-manifest` file — includes the version information about Elasticsearch and JRE provided in the DPK.
3. Open a command prompt.
  4. Change directory to `ES_INSTALL/setup`.
  5. Run the DPK setup script with these options:

```
psft-dpk-setup.bat --install --install_base_dir BASE_DIR
```

- For the `install_base_dir` option, specify the full path where you want Elasticsearch installed. The installation directory is referred to in this documentation as `BASE_DIR`; for example:

```
psft-dpk-setup.bat --install --install_base_dir C:\es232
```

- Use double-dashes when specifying the script options; for example, `--install`.

6. Answer `y` (yes) to continue the installation, or `n` (no) to exit.

```
You've chosen to do a fresh installation of Elasticsearch. Do you want→
to
continue with your choice? (y/n): y
```

7. Enter the password two times for the Elasticsearch administrative user `esadmin`, at the following prompt. The `esadmin` user is used to authenticate requests on Elasticsearch.

---

**Note.** The script does not display the password or any masking characters as you type.

---



---

**Note.** The `esadmin` user is not the same as the user who installs the Elasticsearch DPK and owns the files.

---

```
Enter the password for esadmin.
Re-enter the password for esadmin:
```

8. Enter the password for the Elasticsearch proxy user, `people`.

Note that this is not the same user as the PeopleSoft connect ID, which also has `people` as the default value.

```
Enter the password for people.
Re-enter the password for people:
```

9. Enter the name for the Elasticsearch cluster, or accept the default name, `ESCLUSTER`.

```
Enter the ES cluster name [ ESCLUSTER ] :
```

10. Enter the Elasticsearch HTTP port.

This is the port on which Elasticsearch listens for requests. The default is 9200.

```
Enter the HTTP port for Elasticsearch [ 9200 ] :
```

11. Enter the host name for any nodes that are already members of a cluster.

```
Enter the list of discovery hosts [ ["127.0.0.1", "[::1]"] ] :
```

Be sure to use the following syntax:

- Enclose one or more host names in square brackets.
- Enclose the host name or IP address in *double quotes* (" ").
- Use commas to list two or more hosts.
- Use this as an example for one host: `[ "host1.example.com" ]`

- Use this as an example for more than one host: [ "host1.example.com", "127.0.0.1" ]

12. Enter the minimum number of nodes.

Enter the minimum number of master nodes :

13. Enter the location for the Elasticsearch data.

Oracle recommends that you do not use the default location, *BASE\_DIR*/pt/es2.3.2/data, with PeopleSoft environments. Instead, specify a data directory that is outside of *BASE\_DIR*/pt/es2.3.2.

Enter the path where you want the Elasticsearch data to reside [ C:⇒  
 \es23rev3\pt\es2.3.2\data ] :

14. Enter the location for the Elasticsearch logs.

The default location is *BASE\_DIR*/pt/es2.3.2/logs.

Enter the path where you want the Elasticsearch Logs to be written to [⇒  
 C:\es23rev3\pt\es2.3.2\logs ] :

15. Enter the heap size as a number with the letter "G" as shown in this example:.

See Prerequisites

Enter the Java Heap size for Elasticsearch [ 1G ] : **7G**

16. Review the status messages as the script sets up the PeopleSoft environment.

```
Extracting the new ES Binary .... . [OK]
Extracting the new JRE ..... . [OK]
Setting users/roles in ES ..... [OK]
Configuring Elasticsearch ..... [OK]
Starting Elasticsearch server ... . [OK]
```

Elasticsearch Installation Completed.

A successful deployment includes the following:

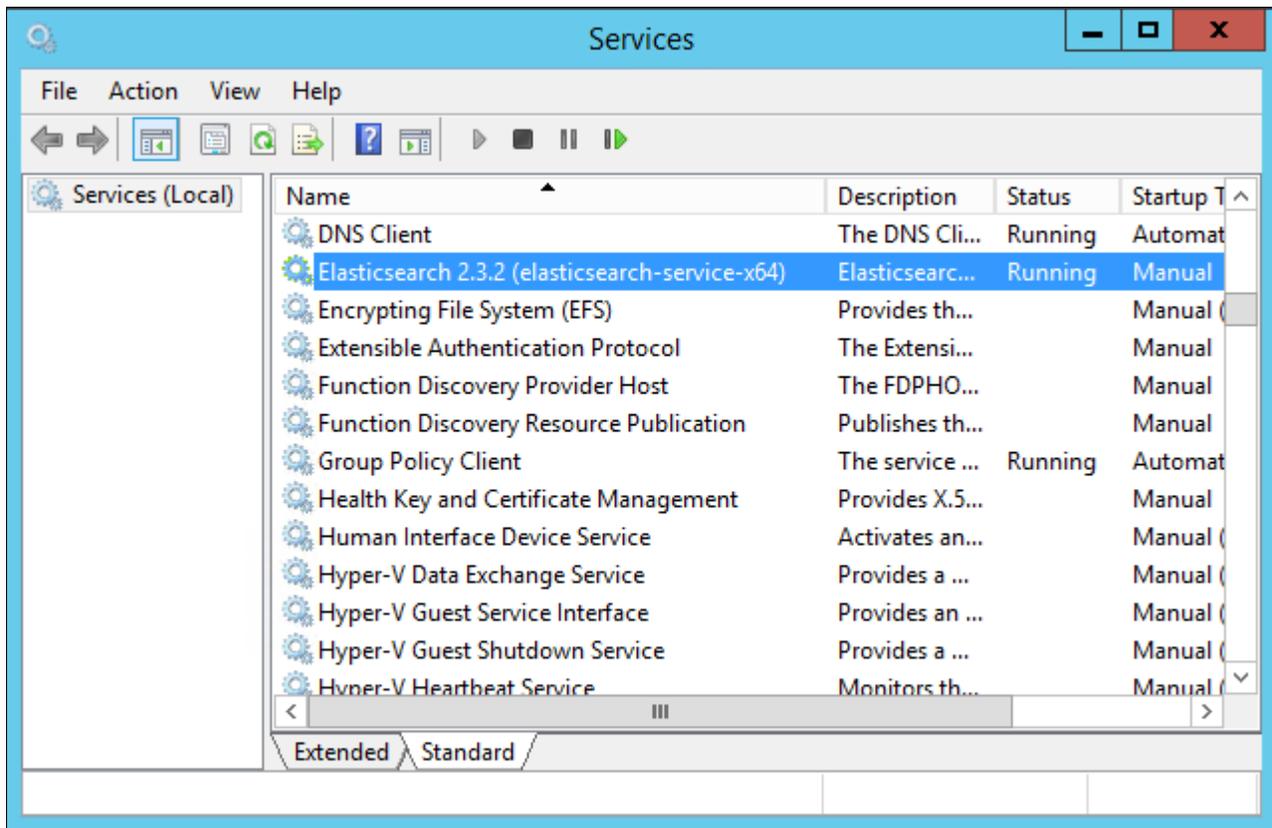
- The Elasticsearch home directory is found in *BASE\_DIR*/pt/es2.3.2.
- The Elasticsearch data and logs directories are installed to the locations you specified.
- The Elasticsearch service is installed and running.
- The ES\_HOME environment variable is set to *BASE\_DIR*/pt/es2.3.2.  
 The environment variable persists until you close the command prompt window.
- Java is installed to *BASE\_DIR*/pt/es\_jre1.8.0\_yy, where yy is the JRE version.
- The JAVA\_HOME environment variable is set to *BASE\_DIR*/pt/es\_jre1.8.0\_yy.  
 This environment variable is set at the system level.
- The ES\_HEAP\_SIZE environment variable is set to the value you enter when running the setup script.  
 This environment variable is set at the system level.

## Task 2-3-2: Verifying the Elasticsearch 2.3.2 Installation on Microsoft Windows

The Elasticsearch deployment sets up a Windows service. To verify the installation:

1. Launch the Services dialog box, for example by opening Task Manager and selecting the Services tab.

2. Verify that the "elasticsearch-service-x64" service is present and has status "Running," as in this example:



Services dialog box with the Elasticsearch service

3. If the Elasticsearch service is not listed, you can start it manually:
  - a. Open a command prompt.
  - b. Go to `ES_HOME\bin` and enter the following command:
 

```
service.bat install
```
  - c. Start the service with the following command:
 

```
service.bat start
```

After verifying the service, use one of the following methods to verify the Elasticsearch installation.

- Run a REST call.

This example uses the CURL utility to run the REST call:

```
curl --user <username>:<password> -XGET http://<host>:<port>
```

For details about the correct usage of the CURL utility, see your operating system documentation.

- Open a browser and enter the following URL:

```
http://<username>:<password>@<host>:<port>/
```

For both the REST command and the browser URL, use these definitions:

- username — the Elasticsearch user administrator, `esadmin`
- password — the password you entered during the DPK setup script installation

- host — the Elasticsearch host name.
- port — Elasticsearch (REST) port that you entered during the DPK setup script installation

In both cases, you should see a message similar to the following:

```
{
  "name" : "abc.abc.com",
  "cluster_name" : "ESCLUSTER",
  "version" : {
    "number" : "2.3.2",
    "build_hash" : "b9e4a6acad4008027e4038f6abed7f7dba346f94",
    "build_timestamp" : "2016-04-21T16:03:47Z",
    "build_snapshot" : false,
    "lucene_version" : "5.5.0"
  },
  "tagline" : "You Know, for Search"
}
```

### Task 2-3-3: Performing Post-Installation Steps on Microsoft Windows

After you complete the Elasticsearch DPK installation, if you want to perform operations described later in this chapter, such as starting and stopping Elasticsearch, or running the `elasticsearchuser` script, perform the manual steps described in this section.

Verify whether the environment variables `ES_HEAP_SIZE` and `JAVA_HOME` were set by the installation process. If not, set them as follows:

- Set `ES_HEAP_SIZE` to a value equal to or less than 50% of available memory, and not exceeding 30G. Enter a number followed by the letter "G"; for example:
 

```
set ES_HEAP_SIZE=7G
```
- Set `JAVA_HOME` to the location installed by the DPK setup script; for example:
 

```
set JAVA_HOME=BASE_DIR\pt\es_jre1.8.0_yy
```

### Task 2-3-4: Removing the Elasticsearch 2.3.2 Installation from Microsoft Windows

Use these steps to remove the Elasticsearch DPK installation from Microsoft Windows.

---

**Note.** You must use the manual steps. There is no cleanup option for the `psft-dpk-setup.bat` script.

---

1. Open a command prompt.
2. Enter the following commands, substituting the Elasticsearch installation directory, such as `BASE_DIR\pt\es2.3.2`, for `ES_HOME`:

```
ES_HOME\bin\service.bat stop
ES_HOME\bin\service.bat remove
```

3. Remove the Elasticsearch installation directories.

## Task 2-4: Upgrading Elasticsearch 2.3.2 on Linux

---

This section discusses:

- Prerequisites
- Upgrading on Linux
- Verifying the Upgrade

### Prerequisites

Use these instructions to upgrade an existing Elasticsearch installation using the DPK setup script. This procedure assumes that:

- You have downloaded the current Elasticsearch 2.3.2 DPK for Linux, and saved it in a newly created directory referred to in this documentation as *ES\_INSTALL*.

---

**Note.** You cannot upgrade from the Elasticsearch 2.3.2 DPK to the Elasticsearch 6.1.2 DPK using this procedure. For information on moving to Elasticsearch 6.1.2, see the Elasticsearch home page.

See Elasticsearch Home Page, My Oracle Support, Doc ID 2205540.2.

---

- The user who runs the script to upgrade Elasticsearch is the same user who is running the existing Elasticsearch process.

---

**Note.** In earlier revisions of the Elasticsearch DPK, for which the installations used Puppet, the script set up a system user "esuser" for use with the DPK scripts on Linux.

---

If you used the manual method to install the Elasticsearch DPK, be sure to log in as the user who is the owner of the existing Elasticsearch installation before beginning the upgrade. The manual installation method is documented in *Installing or Upgrading the Elasticsearch DPK Manually*, found on the Troubleshooting and Known Issues tab on the Elasticsearch Home page.

See Elasticsearch Home Page, My Oracle Support, Doc ID 2205540.2.

- Bring down Elasticsearch on all of the nodes in the cluster.

It is not necessary to upgrade all of the nodes at the same time. However, you must bring down *all* Elasticsearch nodes in a cluster before upgrading any one of the nodes.

See "Performing Additional Tasks," Starting and Stopping an Elasticsearch Service.

- For all Elasticsearch nodes in the cluster, edit the `elasticsearch.yml` file and verify that all of the hosts with nodes are specified in `discovery.zen.ping.unicast.hosts`.

See "Performing Additional Tasks," Modifying the Elasticsearch Configuration File.

- Sign in to the PeopleSoft application and verify that there are no index operations running.

See *PeopleTools: Search Technology*, "Working with Search Indexes."

- In the PeopleSoft application, ensure that the replica value is greater than 1 for the indexes.

To specify the replica value, select PeopleTools, Search Framework, Search Admin Activity Guide, Administration, Search Options. On the Search Options page, enter a value greater than 1 (one) for Number of Replicas.

See *PeopleTools: Search Technology*, "Managing General Search Options."

## Task 2-4-1: Upgrading on Linux

To upgrade Elasticsearch on Linux:

1. In a terminal window, go to the directory where you downloaded the current Elasticsearch DPK, *ES\_INSTALL*.
2. Extract the entire contents of the zip file (for example, `ELASTICSEARCH-DPK-LNX-2.3.2_XX.zip` or `V123456-01.zip`) in the same directory, *ES\_INSTALL*.

---

**Note.** It is a good idea to extract into the same directory where you downloaded the zip files, and to extract into an empty directory for each new installation.

---

The extraction creates the following directories in *ES\_INSTALL*:

- setup directory — includes the setup scripts
- puppet directory — includes the open-source Puppet software for optional installation
- archives directory — includes archives for deployment
- readme.txt file
- elasticsearch-manifest file — includes the version information about Elasticsearch and JRE provided in the DPK.

3. Change directory to *ES\_INSTALL/setup*.
4. Run the DPK setup script.

```
./psft-dpk-setup.sh --upgrade --install_base_dir BASE_DIR
```

- For the `install_base_dir` option, specify the full path of the existing Elasticsearch installation. The installation directory is referred to in this documentation as *BASE\_DIR*.
- Use double-dashes when specifying the script options; for example, `--upgrade`.

5. Answer *y* (yes) to continue the upgrade, or *n* (no) to exit.

```
You've chosen to do an upgrade, it'll bring down the elasticsearch for⇒
a while, do you still want to continue with the upgrade?"): y
```

The script stops the Elasticsearch process.

```
Stopping Elasticsearch server [OK]
```

6. Enter the heap size.

See Prerequisites

```
Enter the Java Heap size for Elasticsearch [ 1G ] :
```

7. Review the status messages as the script upgrades the Elasticsearch installation:

```
Extracting the new ES Binary [OK]
Upgrade in process [OK]
Cleaning up [OK]
Starting Elasticsearch server [OK]
```

You see a message indicating the upgrade was successful

```
Elasticsearch Upgrade Completed.
```

## Task 2-4-2: Verifying the Upgrade

Before you can use Elasticsearch after upgrading, you must check the health of the cluster. Use one of the following methods to verify that the upgrade was successful:

- Use the PeopleSoft Health Center to check the Elasticsearch status.  
The status must be green, indicating that the cluster is fully operational, before you can proceed to use the upgraded Elasticsearch.

See *PeopleTools: Search Technology*, "Viewing the Elasticsearch Cluster Dashboard."

- Use CURL and run the following, substituting the Elasticsearch server name and HTTP port.:

```
curl -XGET '<ES_SERVER>:<HTTP_PORT>/_cat/health?pretty'
```

For details about the correct usage for the CURL utility, see your operating system documentation.

- Open a browser and enter the following URL:

```
http://<ES_SERVER>:<HTTP_PORT>/_cluster/health?pretty
```

## Task 2-5: Upgrading Elasticsearch 2.3.2 on Microsoft Windows

---

This section discusses:

- Prerequisites
- Upgrading on Microsoft Windows
- Verifying the Upgrade on Microsoft Windows

### Prerequisites

Use these instructions to upgrade an existing Elasticsearch installation using the DPK setup script. This procedure assumes that:

- You have downloaded the current Elasticsearch 2.3.2 DPK for Microsoft Windows, and saved it in a newly created directory referred to in this documentation as *ES\_INSTALL*.

---

**Note.** You cannot upgrade from the Elasticsearch 2.3.2 DPK to the Elasticsearch 6.1.2 DPK using this procedure. For information on moving to Elasticsearch 6.1.2, see the Elasticsearch home page.

See Elasticsearch Home Page, My Oracle Support, Doc ID 2205540.2.

---

- The user who runs the script to upgrade Elasticsearch is the same user who is running the existing Elasticsearch process.

If you used the manual method to install the Elasticsearch DPK, be sure to log in as the user who is the owner of the existing Elasticsearch installation before beginning the upgrade. The manual installation method is documented in *Installing or Upgrading the Elasticsearch DPK Manually*, found on the Troubleshooting and Known Issues tab on the Elasticsearch Home page.

See Elasticsearch Home Page, My Oracle Support, Doc ID 2205540.2.

- Bring down all of the Elasticsearch nodes in the cluster.

It is not necessary to upgrade all of the nodes at the same time. However, you must bring down *all* Elasticsearch nodes in a cluster before upgrading any one of the nodes.

See "Performing Additional Tasks," Starting and Stopping an Elasticsearch Service.

- For all Elasticsearch nodes in the cluster, edit the `elasticsearch.yml` file and verify that all of the hosts with nodes are specified in `discovery.zen.ping.unicast.hosts`.

See "Performing Additional Tasks," Modifying the Elasticsearch Configuration File.

- Sign in to the PeopleSoft application and verify that there are no index operations running.

See *PeopleTools: Search Technology*, "Working with Search Indexes."

- In the PeopleSoft application, ensure that the replica value is greater than 1 for the indexes.

To specify the replica value, select PeopleTools, Search Framework, Search Admin Activity Guide, Administration, Search Options. On the Search Options page, enter a value greater than 1 (one) for Number of Replicas.

See *PeopleTools: Search Technology*, "Managing General Search Options."

## Task 2-5-1: Upgrading on Microsoft Windows

To upgrade Elasticsearch on Microsoft Windows:

1. Open a command prompt.
2. Go to the directory where you downloaded the current Elasticsearch DPK, `ES_INSTALL`.
3. Extract the entire contents of the zip file (for example, `ELASTICSEARCH-DPK-WIN-2.3.2_xx.zip` or `V123456-01.zip`) in the same directory, `ES_INSTALL`.

---

**Note.** It is a good idea to extract into the same directory where you downloaded the zip files, and to extract into an empty directory for each new installation.

---

The extraction creates the following directories in `ES_INSTALL`:

- `setup` directory — includes the setup scripts
  - `puppet` directory — includes the open-source Puppet software for optional installation
  - `archives` directory — includes archives for deployment
  - `readme.txt` file
  - `elasticsearch-manifest` file — includes the version information about Elasticsearch and JRE provided in the DPK.
4. Change directory to `ES_INSTALL/setup`.
  5. Run the DPK setup script with these options:
 

```
psft-dpk-setup.bat --upgrade --install_base_dir BASE_DIR
```

    - For the `install_base_dir` option, specify the full path of the existing Elasticsearch installation. The installation directory is referred to in this documentation as `BASE_DIR`.
    - Use double-dashes when specifying the script options; for example, `--upgrade`.
  6. Answer `y` (yes) to continue the upgrade, or `n` (no) to exit.

```
You've chosen to do an upgrade, it'll bring down the elasticsearch for⇒
a while, do you still want to continue with the upgrade?"): y
```

The script stops the Elasticsearch process.

```
Stopping Elasticsearch server [OK]
```

7. Enter the heap size.

See Prerequisites.

Enter the Java Heap size for Elasticsearch [ 1G ] :

8. Review the status messages as the script runs Puppet profiles to set up the PeopleSoft environment.

```
Extracting the new ES Binary           [OK]
Upgrade in process                     [OK]
Cleaning up                            [OK]
Starting Elasticsearch server          [OK]
```

You see a message indicating the upgrade was successful.

Elasticsearch Upgrade Completed.

## Task 2-5-2: Verifying the Upgrade on Microsoft Windows

Before you can use Elasticsearch after upgrading, you must check the health of the cluster. Use one of the following methods to verify that the upgrade was successful:

- Use the PeopleSoft Health Center to check the Elasticsearch status.  
The status must be green, indicating that the cluster is fully operational, before you can proceed to use the upgraded Elasticsearch.

See *PeopleTools: Search Technology*, "Viewing the Elasticsearch Cluster Dashboard."

- Use CURL and run the following, substituting the Elasticsearch server name and HTTP port.:

```
curl -XGET '<ES_SERVER>:<HTTP_PORT>/_cat/health?pretty'
```

For details about the correct usage for the CURL utility, see your operating system documentation.

- Open a browser and enter the following URL:

```
http://<ES_SERVER>:<HTTP_PORT>/_cluster/health?pretty
```

## Chapter 3

# Deploying the Elasticsearch 6.1.2 Deployment Package

This chapter discusses:

- Obtaining the Elasticsearch 6.1.2 DPK
- Installing Elasticsearch 6.1.2 on Linux
- Installing Elasticsearch 6.1.2 on Microsoft Windows

## **Task 3-1: Obtaining the Elasticsearch 6.1.2 DPK**

---

This section discusses:

- Obtaining the Elasticsearch 6.1.2 DPK from Oracle Software Delivery Cloud
- Obtaining the Elasticsearch 6.1.2 DPK from My Oracle Support

### **Task 3-1-1: Obtaining the Elasticsearch 6.1.2 DPK from Oracle Software Delivery Cloud**

To obtain the Elasticsearch DPK from Oracle Software Delivery Cloud:

1. Sign in to Oracle Software Delivery Cloud.  
See Oracle Software Delivery Cloud, <https://edelivery.oracle.com>.
2. Search for the current PeopleSoft PeopleTools release, and select Microsoft Windows or Linux as the Platform.
3. Locate Elasticsearch in the search results.
4. Download the Elasticsearch file, for example V123456-01.zip.

Be sure that the directory where you download the zip file, referred to as *ES\_INSTALL* in this documentation, has adequate available space. The directory should be a newly created directory with no other files present.

### **Task 3-1-2: Obtaining the Elasticsearch 6.1.2 DPK from My Oracle Support**

To obtain the Elasticsearch 6.1.2 DPK from My Oracle Support:

1. Sign in to My Oracle Support.  
See My Oracle Support, <https://support.oracle.com>.
2. Select the Patches & Updates tab.
3. Select Product or Family (Advanced), and search for PeopleSoft PeopleTools.

Specify the current release.

4. To narrow the search results, select Description, and enter Elasticsearch.
5. In the list of results, locate the Elasticsearch file for your operating system, ES-DPK-*<Operating\_System>-<Release.Patch>\_<DPK\_revision>.zip*, where the file name includes the following:
  - *<Operating\_System>* is LNX for Oracle Linux, or WIN for Microsoft Windows.
  - *<Release.Patch>* is the release and patch number for the product, such as 6.1.2.
  - *<DPK\_revision>* is a number specific to the DPK revision. The examples in this documentation use *xx* to represent the DPK revision number.

For example, ES-DPK-WIN-6.1.2\_XX.zip or ES-DPK-LNX-6.1.2\_XX.zip.

6. Download the file.

Be sure that the directory where you download the zip file, referred to as *ES\_INSTALL* in this documentation, has adequate available space. The directory should be a newly created directory with no other files present.

## **Task 3-2: Installing Elasticsearch 6.1.2 on Linux**

This section discusses:

- Installing Elasticsearch 6.1.2 on Linux Interactively
- Installing Elasticsearch 6.1.2 on Linux in Silent Mode
- Verifying the Elasticsearch 6.1.2 Installation on Linux
- Removing the Elasticsearch 6.1.2 Installation from Linux
- Performing Post-Installation Steps on Linux

### **Task 3-2-1: Installing Elasticsearch 6.1.2 on Linux Interactively**

Use this procedure on physical or virtual Linux hosts. This procedure assumes:

- You have downloaded the required Elasticsearch DPK for Linux, referred to as *ES\_FILENAME.zip*, and saved it in a newly created directory accessible to the Linux host, referred to as *ES\_INSTALL*.
- There is enough space on the Linux host for the Elasticsearch installation and your estimated indexing requirements.

Make a note of the values you supply for ports, passwords, and so on. When you configure the Elasticsearch instance for PeopleSoft, the values must match those specified here.

1. Open a terminal window.
2. Change directory to *ES\_INSTALL*.

```
cd ES_INSTALL
```

3. Extract the entire contents of *ES\_FILENAME.zip* in the same directory, *ES\_INSTALL*.

```
unzip ES_FILENAME.zip
```

---

**Note.** It is a good idea to extract into the same directory where you downloaded the zip files, and to extract into an empty directory for each new installation.

---

The extraction creates the following directories and files in *ES\_INSTALL*:

- setup directory — includes the setup scripts and a silent installation sample
  - archives directory — includes archives for deployment
  - readme.txt file
  - elasticsearch-manifest — versions of Elasticsearch and JRE
4. Run the DPK setup script from `ES_INSTALL/setup` as follows:

```
./psft-dpk-setup.sh --install --install_base_dir BASE_DIR
```

- For the `install_base_dir` option, specify the full path where you want Elasticsearch installed. The installation directory is referred to in this documentation as `BASE_DIR`. For example:  

```
./psft-dpk-setup.sh --install --install_base_dir /home/es612
```
  - Use double-dashes when specifying the script options; for example, `--install`.
5. Answer `y` (yes) to install Elasticsearch, or `n` (no) to exit.

```
You've chosen to do a fresh installation of Elasticsearch.
Do you want to install Elasticsearch? (y/n): y
```

6. Enter the password two times for the Elasticsearch administrative user `esadmin`, at the following prompt. The `esadmin` user is used to authenticate requests on Elasticsearch.

---

**Note.** The script does not display the password or any masking characters as you type.

---



---

**Note.** The `esadmin` user is not the same as the user who installs the Elasticsearch DPK and owns the files.

---

```
Enter the password for esadmin.
Re-enter the password for esadmin:
```

7. Enter the password for the Elasticsearch proxy user, `people`.  
 Note that this is not the same user as the PeopleSoft connect ID, which also has `people` as the default value.

```
Enter the password for people.
Re-enter the password for people:
```

8. Enter the name for the Elasticsearch cluster, or accept the default name, `ESCLUSTER`.

```
Enter the ES cluster name [ ESCLUSTER ] :
```

9. Enter the Elasticsearch HTTP port.

This is the port on which Elasticsearch listens for requests. The default is 9200.

```
Enter the HTTP port for Elasticsearch [ 9200 ] :
```

10. Enter the host name for any nodes that are already members of a cluster.

```
Enter the list of discovery hosts [ ["127.0.0.1", "[::1]"] ] :
```

Be sure to use the following syntax:

- Enclose one or more host names in square brackets.
- Enclose the host name or IP address in *double quotes* (" ").
- Use commas to list two or more hosts.
- Use this as an example for one host: `[ "host1.example.com" ]`

- Use this as an example for more than one host: [ "host1.example.com", "127.0.0.1" ]

11. Enter the minimum number of nodes.

```
Enter the minimum number of master nodes :
```

12. Enter the location for the Elasticsearch data.

Oracle recommends that you do not use the default location, *BASE\_DIR*/pt/elasticsearch6.1.2/data, with PeopleSoft environments. Instead, specify the full path for a data directory that is outside of *BASE\_DIR*/pt/elasticsearch6.1.2.

```
Enter the path where you want the Elasticsearch data to reside [ <BASE_=>
DIR>/pt/elasticsearch6.1.2/data ] :
```

13. Enter the location for the Elasticsearch logs.

The default location is *BASE\_DIR*/pt/elasticsearch6.1.2/logs.

```
Enter the path where you want the Elasticsearch Logs to be written to [=>
<BASE_DIR>/pt/elasticsearch6.1.2/logs ] :
```

14. Enter the heap size as a number without the letter "G" as shown in this example:

See Prerequisites

```
Enter the Java Heap size for Elasticsearch in GB [ 2 ] : 7
```

15. Review the status messages as the script sets up the PeopleSoft environment.

```
Extracting the new ES Binary.....[OK]
Extracting the new JRE.....[OK]
Setting users/roles in ES.....[OK]
Configuring Elasticsearch.....[OK]
Starting Elasticsearch server..... [OK]
```

16. Wait until the installation is complete.

```
Elasticsearch Installation Completed.
```

A successful deployment includes the following:

- The Elasticsearch home directory is found in *BASE\_DIR*/pt/elasticsearch6.1.2.
- The ES\_HOME environment variable is set to *BASE\_DIR*/pt/elasticsearch6.1.2 for the current terminal session.
- Java is installed to *BASE\_DIR*/pt/es\_jre1.8.0\_yy, where yy is the JRE version.
- The JAVA\_HOME environment variable is set to *BASE\_DIR*/pt/es\_jre1.8.0\_yy for the current terminal session.

See Performing Post-Installation Steps on Linux.

## Task 3-2-2: Installing Elasticsearch 6.1.2 on Linux in Silent Mode

This section discusses:

- Extracting the DPK and Encrypting the Passwords on Linux
- Creating a Configuration File and Running the Silent Mode Installation on Linux

## Extracting the DPK and Encrypting the Passwords on Linux

You can use the setup script to install Elasticsearch in silent mode by preparing a text file that includes installation details.

The passwords that you include in the silent mode text file must be encrypted using the PSCipher utility. You must use the pscipher.jar and psvault files that are part of the Elasticsearch DPK. The psvault that is delivered with PeopleSoft PeopleTools will not work for Elasticsearch.

1. Open a terminal window.
2. Change directory to *ES\_INSTALL*.

```
cd ES_INSTALL
```

3. Extract the entire contents of *ES\_FILENAME.zip* in the same directory, *ES\_INSTALL*.

```
unzip ES_FILENAME.zip
```

---

**Note.** It is a good idea to extract into the same directory where you downloaded the zip files, and to extract into an empty directory for each new installation.

---

The extraction creates the following directories in *ES\_INSTALL*:

- setup directory — includes the setup script and a sample configuration file.
  - archives directory — includes archives for deployment
  - readme.txt file
  - elasticsearch-manifest — lists the version information for Elasticsearch and JRE included in the DPK
4. Go to *ES\_INSTALL\archives* and extract pt-elasticsearch-6.1.2.tgz into a folder with the same name.
  5. Copy pscipher.jar from pt-elasticsearch-6.1.2/plugins/orcl-security-plugin to a convenient location, such as /var/estemp.
  6. Copy psvault from pt-elasticsearch-6.1.2/plugins/orcl-security-plugin/config/properties to /var/estemp.
  7. In a command prompt, change directory to a temporary directory, such as /var/estemp.
  8. Run the following command, specifying the passwords for esadmin and people.

Copy the encrypted text without adding line feeds or spaces and paste them into the silentinstall.config file in the next section. The encrypted passwords are saved in es\_output.txt.

```
java -Dpscipher.path=<path_to_which_files_are_extracted> -cp <path_to_which_files_are_extracted>/pscipher.jar com.peoplesoft.pt.elasticsearch.pscipher.PSESEncrypt esadmin <password> people <password> <output_path>/es_output.txt
```

## Creating a Configuration File and Running the Silent Mode Installation on Linux

To install in silent mode:

1. Create a configuration file.

The *ES\_INSTALL/setup* directory include a sample configuration file, silentinstall.config. If you want to use this file, it is a good idea to make a backup copy of the original file before you continue.

Edit the configuration file with the required environment parameters. Here is a sample:

```

#Silent Install Configuration Values for installing Elasticsearch

#Install Elasticsearch Y/N is mandatory field
Install elasticsearch?[Y/N]= n

#Elasticsearch cluster name (mandatory)
cluster.name= ESCLUSTER

#Elasticsearch host name (mandatory)
network.host=

#Elasticsearch port number (optional-default 9200)
http.port= 9200

#Elasticsearch data directory (optional-default ES_HOME/data)
path.data=

#Elasticsearch log directory (optional-default ES_HOME/logs)
path.logs=

#Elasticsearch discovery hosts (optional)
discovery.hosts= ["127.0.0.1", "[:,:1]"]

#Elasticsearch minimum master nodes (optional)
minimum_master_nodes= 1

#Elasticsearch heap size (optional-default 2)
ES_HEAP_SIZE=

#Elasticsearch encrypted password for esadmin (mandatory)
esadmin.password=

#Elasticsearch encrypted password for people (mandatory)
people.password=

```

2. Enter the encrypted passwords that you prepared for `esadmin.password` and `people.password`.
3. Run the DPK setup script from `ES_INSTALL/setup` as follows:

```
./psft-dpk-setup.sh --install_silent --install_base_dir BASE_DIR -->
config_path full_path_configuration_file
```

- Use double-dashes when specifying the script options; for example, `--install_silent..`
- For the `install_base_dir` option, specify the full path where you want Elasticsearch installed. The installation directory is referred to in this documentation as *BASE\_DIR*.
- For the `config_path` option, specify the full path to the prepared configuration file. For example:

```
./psft-dpk-setup.sh --install_silent --install_base_dir /home/es612 -->
config_path /home/temp_install/silentinstall.config
```

4. When the script completes, you see a message such as:  
Elasticsearch Installation Completed.

### Task 3-2-3: Verifying the Elasticsearch 6.1.2 Installation on Linux

To verify the Elasticsearch installation, in a terminal window, ensure that the following command gives an output:

```
ps -ef | grep elas
```

After verifying the process, use one of the following methods to verify the Elasticsearch installation.

- Run a REST call.

This example uses the CURL utility for the REST call:

```
curl --user <username>:<password> -XGET http://<host>:<port>
```

For details about the correct usage for the CURL utility, see your operating system documentation.

- Open a browser and enter the following URL:

```
http://<username>:<password>@<host>:<port>/
```

For both the REST command and the browser URL, use these definitions:

- username — the Elasticsearch user administrator, esadmin
- password — the password you entered during the DPK setup script installation
- host — the Elasticsearch host name
- port — Elasticsearch (REST) port that you entered during the DPK setup script installation

In both cases, you should see a message similar to the following:

```
{
  "name" : "abc.abc.com",
  "cluster_name" : "ESCLUSTER",
  "cluster_uuid" : "2Lnh...",
  "version" : {
    "number" : "6.1.2",
    "build_hash" : "b9e4a",
    "build_timestamp" : "2018-04-21T16:03:47Z",
    "build_snapshot" : false,
    "lucene_version" : "7.1.0"
    "minimum_wire_compatibility_version" : "5.6.0"
    "minimum_index_compatibility_version" : "5.0.0"
  },
  "tagline" : "You Know, for Search"
}
```

After you complete the Elasticsearch installation, you must configure the integration with the PeopleSoft environment.

See "Integrating Elasticsearch with the PeopleSoft Environment."

### Task 3-2-4: Removing the Elasticsearch 6.1.2 Installation from Linux

Use these steps to remove the Elasticsearch DPK installation from a Linux host:

---

**Note.** You must use the manual steps. There is no cleanup option for the psft-dpk-setup.sh script.

---

1. Use the following command to determine the Elasticsearch process ID (pid):

```
ps -ef |grep elastic
```

2. Stop the process, substituting the Elasticsearch process ID for <pid>:

```
stop <pid>
```

3. Remove the Elasticsearch installation directories.

### Task 3-2-5: Performing Post-Installation Steps on Linux

After you complete the Elasticsearch DPK installation, if you want to perform operations described later in this chapter, such as starting and stopping Elasticsearch, or running the `elasticsearchuser` script, perform the manual steps described in this section.

- Ensure that the heap size is set to a value equal to or less than 50% of available memory, and not exceeding 30G.

See "Preparing to Deploy," Reviewing Elasticsearch Recommendations.

- In a terminal for the current session, set the `JAVA_HOME` environment variable to the location installed by the DPK setup script; for example:

```
export JAVA_HOME= BASE_DIR/pt/es_jre1.8.0_yy
```

## Task 3-3: Installing Elasticsearch 6.1.2 on Microsoft Windows

---

This section discusses:

- Installing Elasticsearch 6.1.2 on Microsoft Windows Interactively
- Installing Elasticsearch 6.1.2 on Microsoft Windows in Silent Mode
- Verifying the Elasticsearch 6.1.2 Installation on Microsoft Windows
- Removing the Elasticsearch Installation from Microsoft Windows
- Performing Post-Installation Steps on Microsoft Windows

### Task 3-3-1: Installing Elasticsearch 6.1.2 on Microsoft Windows Interactively

Use this procedure on physical or virtual Microsoft Windows hosts. This procedure assumes that:

- You have downloaded the required Elasticsearch DPK for Microsoft Windows, *ES\_FILENAME.zip*, and saved it in a newly created directory accessible to the Microsoft Windows host, referred to as *ES\_INSTALL*.
- There is enough space on the host for the Elasticsearch installation and your estimated indexing requirements.

Make a note of the values you supply for ports, passwords, and so on. When you configure the Elasticsearch instance for PeopleSoft, the values must match those specified here.

1. Go to *ES\_INSTALL*.
2. Extract the entire contents of *ES\_FILENAME.zip* in the same directory, *ES\_INSTALL*.

---

**Note.** It is a good idea to extract into the same directory where you downloaded the zip files, and to extract into an empty directory for each new installation.

---

The extraction creates the following directories and files in *ES\_INSTALL*:

- setup directory — includes the setup script and a silent installation sample
  - archives directory — includes archives for deployment
  - readme.txt file
  - elasticsearch-manifest — versions of Elasticsearch and JRE
3. Open a command prompt.
  4. Change directory to *ES\_INSTALL/setup*.
  5. Run the DPK setup script with these options:

```
psft-dpk-setup.bat --install --install_base_dir BASE_DIR
```

- For the *install\_base\_dir* option, specify the full path where you want Elasticsearch installed. The installation directory is referred to in this documentation as *BASE\_DIR*; for example:
 

```
psft-dpk-setup.bat --install --install_base_dir C:\es612
```
  - Use double-dashes when specifying the script options; for example, `--install`.
6. Answer *y* (yes) to install Elasticsearch, or *n* (no) to exit.
 

```
You've chosen to do a fresh installation of Elasticsearch.
Do you want to install Elasticsearch? (y/n): y
```
  7. Enter the password two times for the Elasticsearch administrative user *esadmin*, at the following prompt.
 

```
The esadmin user is used to authenticate requests on Elasticsearch.
```

---

**Note.** The script does not display the password or any masking characters as you type.

---



---

**Note.** The *esadmin* user is not the same as the user who installs the Elasticsearch DPK and owns the files.

---

```
Enter the password for esadmin.
Re-enter the password for esadmin:
```

8. Enter the password for the Elasticsearch proxy user, *people*.

---

**Note.** This is not the same user as the PeopleSoft connect ID, which also has *people* as the default value.

---

```
Enter the password for people.
Re-enter the password for people:
```

9. Enter the name for the Elasticsearch cluster, or accept the default name, *ESCLUSTER*.

```
Enter the ES cluster name [ ESCLUSTER ] :
```

10. Enter the Elasticsearch HTTP port.

This is the port on which Elasticsearch listens for requests. The default is 9200.

```
Enter the HTTP port for Elasticsearch [ 9200 ] :
```

11. Enter the host name for any nodes that are already members of a cluster.

```
Enter the list of discovery hosts [ ["127.0.0.1", "[::1]"] ] :
```

Be sure to use the following syntax:

- Enclose one or more host names in square brackets.

- Enclose the host name or IP address in *double quotes* (" ").
- Use commas to list two or more hosts.
- Use this as an example for one host: [ "host1.example.com" ]
- Use this as an example for more than one host: [ "host1.example.com", "127.0.0.1" ]

12. Enter the minimum number of nodes.

Enter the minimum number of master nodes :

13. Enter the location for the Elasticsearch data.

Oracle recommends that you do not use the default location, *BASE\_DIR*/pt/elasticsearch6.1.2/data, with PeopleSoft environments. Instead, specify the full path for a data directory that is outside of *BASE\_DIR*/pt/elasticsearch6.1.2.

Enter the path where you want the Elasticsearch data to reside [ C:⇒  
 \es612\pt\elasticsearch6.1.2\data ] :

14. Enter the location for the Elasticsearch logs.

The default location is *BASE\_DIR*/pt/elasticsearch6.1.2/logs.

Enter the path where you want the Elasticsearch Logs to be written to [⇒  
 C:\es612\pt\elasticsearch6.1.2\logs ] :

15. Enter the heap size as a number with the letter "G" as shown in this example:.

See Prerequisites

Enter the Java Heap size for Elasticsearch in GB [ 2 ] : **7**

16. Review the status messages as the script sets up the PeopleSoft environment.

```
Extracting the new ES Binary.....[OK]
Extracting the new JRE .....[OK]
Setting users/roles in ES.....[OK]
Configuring Elasticsearch.....[OK]
Starting Elasticsearch server.....[OK]
```

17. Wait until the installation is complete.

Elasticsearch Installation Completed.

A successful deployment includes the following:

- The Elasticsearch home directory is found in *BASE\_DIR*/pt/elasticsearch6.1.2.
- The Elasticsearch data and logs directories are installed to the locations you specified.
- The Elasticsearch service is installed and running.
- The ES\_HOME environment variable is set to *BASE\_DIR*/pt/elasticsearch6.1.2.  
 The environment variable persists until you close the command prompt window.
- Java is installed to *BASE\_DIR*/pt/es\_jre1.8.0\_yy, where yy is the JRE version.
- The JAVA\_HOME environment variable is set to *BASE\_DIR*/pt/es\_jre1.8.0\_yy.  
 This environment variable is set at the system level.

## Task 3-3-2: Installing Elasticsearch 6.1.2 on Microsoft Windows in Silent Mode

This section discusses:

- Extracting the DPK and Encrypting the Passwords on Microsoft Windows
- Creating a Configuration File and Running the Silent Mode Installation on Microsoft Windows

### Extracting the DPK and Encrypting the Passwords on Microsoft Windows

You can use the setup script to install Elasticsearch in silent mode by preparing a text file that includes installation details.

The passwords that you include in the silent mode text file must be encrypted using the PSCipher utility. You must use the `pscipher.jar` and `psvault` files that are part of the Elasticsearch DPK. The `psvault` that is delivered with PeopleSoft PeopleTools will not work for Elasticsearch.

1. Go to `ES_INSTALL`.
2. Extract the entire contents of `ES_FILENAME.zip` in the same directory, `ES_INSTALL`.

```
unzip ES_FILENAME.zip
```

---

**Note.** It is a good idea to extract into the same directory where you downloaded the zip files, and to extract into an empty directory for each new installation.

---

The extraction creates the following directories in `ES_INSTALL`:

- `setup` directory — includes the setup script and sample configuration file
- `archives` directory — includes archives for deployment
- `readme.txt` file and other files
- `elasticsearch-manifest` — lists the version information for Elasticsearch and JRE included in the DPK

3. Go to `ES_INSTALL\archives` and extract `pt-elasticsearch-6.1.2.tgz` into a folder with the same name.

It may be necessary to extract the file twice.

4. Copy `pscipher.jar` from `pt-elasticsearch-6.1.2/plugins/orcl-security-plugin` to a convenient location, such as `C:\estemp`.
5. Copy `psvault` from `pt-elasticsearch-6.1.2/plugins/orcl-security-plugin/config/properties` to `C:\estemp`.
6. In a command prompt, change directory to `C:\estemp`.
7. Run the following command, specifying the passwords for `esadmin` and `people`.

Copy the encrypted text without adding line feeds or spaces and paste them into the `silentinstall.config` file in the next section. The encrypted passwords are saved in `es_output.txt`.

```
java -Dpscipher.path=<path_to_which_files_are_extracted> -cp <path_to_which_files_are_extracted>/pscipher.jar com.peoplesoft.pt.elasticsearch.pscipher.PSESEncrypt esadmin <password> people <password> <output_path>/es_output.txt
```

## Creating a Configuration File and Running the Silent Mode Installation on Microsoft Windows

To install in silent mode:

1. Create a configuration file.

The `ES_INSTALL/setup` directory includes a sample configuration file, `silentinstall.config`. If you want to use this file, it is a good idea to make a backup copy of the original file before you continue.

Edit the configuration file with the required environment parameters. Here is a sample:

```
#Silent Install Configuration Values for installing Elasticsearch

#Install Elasticsearch Y/N is mandatory field
Install elasticsearch?[Y/N]= n

#Elasticsearch cluster name (mandatory)
cluster.name= ESCLUSTER

#Elasticsearch host name (mandatory)
network.host=

#Elasticsearch port number (optional-default 9200)
http.port= 9200

#Elasticsearch data directory (optional-default ES_HOME/data)
path.data=

#Elasticsearch log directory (optional-default ES_HOME/logs)
path.logs=

#Elasticsearch discovery hosts (optional)
discovery.hosts= ["127.0.0.1", "[:,:1]"]

#Elasticsearch minimum master nodes (optional)
minimum_master_nodes= 1

#Elasticsearch heap size (optional-default 2)
ES_HEAP_SIZE= 2

#Elasticsearch encrypted password for esadmin (mandatory)
esadmin.password=

#Elasticsearch encrypted password for people (mandatory)
people.password=
```

2. Enter the encrypted passwords that you prepared for `esadmin.password` and `people.password`.
3. In a command prompt window, run the DPK setup script from `ES_INSTALL/setup` as follows:

```
psft-dpk-setup.bat --install_silent --install_base_dir BASE_DIR -->
config_path full_path_configuration_file
```

- Use double-dashes when specifying the script options; for example, `--install_silent`.

- For the `install_base_dir` option, specify the full path where you want Elasticsearch installed. The installation directory is referred to in this documentation as *BASE\_DIR*.
- For the `config_path` option, specify the full path to the prepared configuration file. For example:

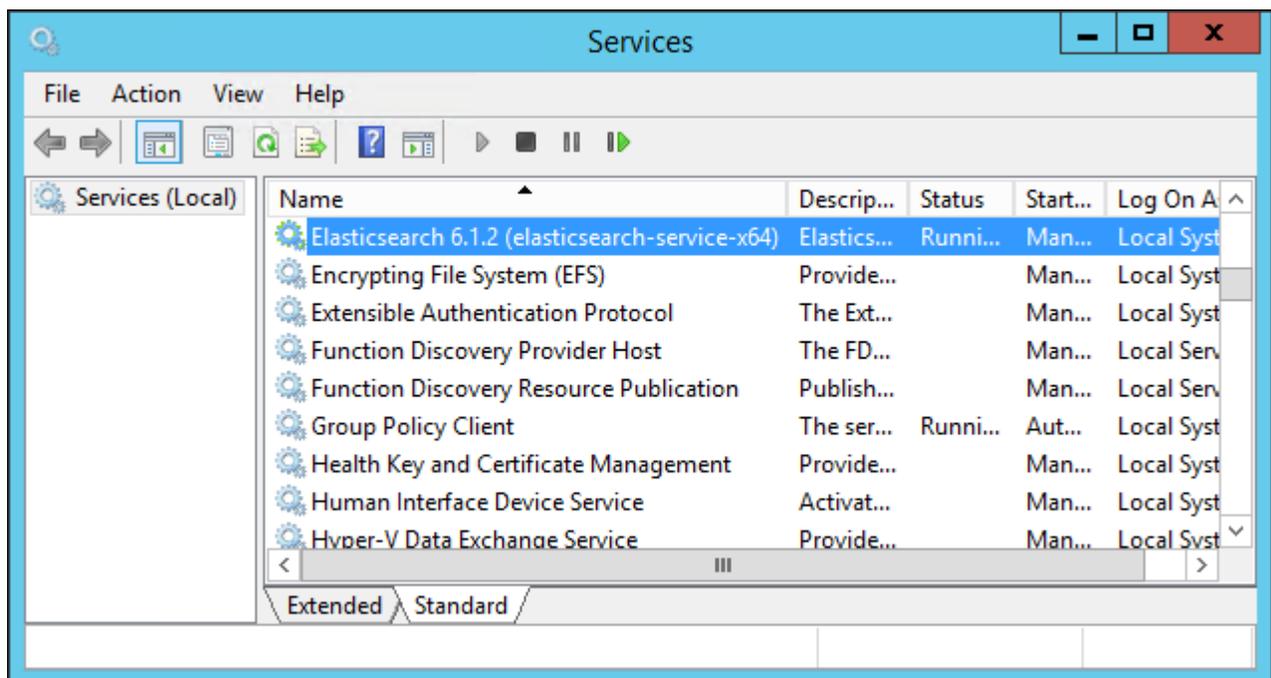
```
psft-dpk-setup.bat --install_silent --install_base_dir C:/es612 -->
config_path C:/tmp_install/silentinstall.config
```

4. When the script completes, you see a message such as:  
Elasticsearch Installation Completed.

### Task 3-3-3: Verifying the Elasticsearch 6.1.2 Installation on Microsoft Windows

The Elasticsearch deployment sets up a Windows service. To verify the installation:

1. Launch the Services dialog box, for example by opening Task Manager and selecting the Services tab.
2. Verify that the "elasticsearch-service-x64" service is present and has status "Running," as in this example:



Services dialog box with the Elasticsearch service

3. If the Elasticsearch service is not listed, you can start it manually:
  - a. Open a command prompt.
  - b. Go to `ES_HOME\bin` and enter the following command:  
`elasticsearch-service.bat install`
  - c. Start the service with the following command:  
`elasticsearch-service.bat start`

After verifying the service, use one of the following methods to verify the Elasticsearch installation.

- Run a REST call.

This example uses the CURL utility to run the REST call:

```
curl --user <username>:<password> -XGET http://<host>:<port>
```

For details about the correct usage of the CURL utility, see your operating system documentation.

- Open a browser and enter the following URL:

```
http://<username>:<password>@<host>:<port>/
```

For both the REST command and the browser URL, use these definitions:

- username — the Elasticsearch user administrator, esadmin
- password — the password you entered during the DPK setup script installation
- host — the Elasticsearch host name.
- port — Elasticsearch (REST) port that you entered during the DPK setup script installation

In both cases, you should see a message similar to the following:

```
{
  "name" : "abc.abc.com",
  "cluster_name" : "ESCLUSTER",
  "cluster_uuid" : "2Lnh...",
  "version" : {
    "number" : "6.1.2",
    "build_hash" : "b9e4a",
    "build_timestamp" : "2018-04-21T16:03:47Z",
    "build_snapshot" : false,
    "lucene_version" : "7.1.0"
    "minimum_wire_compatibility_version" : "5.6.0"
    "minimum_index_compatibility_version" : "5.0.0"
  },
  "tagline" : "You Know, for Search"
}
```

After you complete the Elasticsearch installation, you must configure the integration with the PeopleSoft environment.

See "Integrating Elasticsearch with the PeopleSoft Environment."

## Task 3-3-4: Removing the Elasticsearch Installation from Microsoft Windows

Use these steps to remove the Elasticsearch DPK installation from Microsoft Windows.

---

**Note.** You must use the manual steps. There is no cleanup option for the psft-dpk-setup.bat script.

---

1. Open a command prompt.
2. Enter the following commands, substituting the Elasticsearch installation directory, such as *BASE\_DIR*\pt\elasticsearch6.1.2, for *ES\_HOME*.

```
ES_HOME\bin\elasticsearch-service.bat stop
ES_HOME\bin\elasticsearch-service.bat remove
```

3. Remove the Elasticsearch installation directories.

## Task 3-3-5: Performing Post-Installation Steps on Microsoft Windows

After you complete the Elasticsearch DPK installation, if you want to perform operations described later in this chapter, such as starting and stopping Elasticsearch, or running the `elasticsearchuser` script, perform the manual steps described in this section.

- Ensure that the heap size is set to a value equal to or less than 50% of available memory, and not exceeding 30G.

See "Preparing to Deploy," Reviewing Elasticsearch Recommendations.

- Verify that the `JAVA_HOME` environment variable was set to the location installed by the DPK setup script. If not, set it, for example:

```
set JAVA_HOME=BASE_DIR\pt\es_jre1.8.0_yy
```



## Chapter 4

# Integrating Elasticsearch with the PeopleSoft Environment

This chapter discusses:

- Applying PeopleSoft Application Support Bugs for Elasticsearch
- Setting Up the PeopleSoft Application for Elasticsearch
- Adding and Configuring an Elasticsearch Instance

## **Task 4-1: Applying PeopleSoft Application Support Bugs for Elasticsearch**

---

In order to integrate your PeopleSoft environment with Elasticsearch, you must identify and apply any necessary bugs delivered with the latest PeopleSoft Update Image (PI) for your PeopleSoft application.

1. Go to PeopleSoft Update Manager (PUM) Home Page, My Oracle Support, Doc ID 1641843.2.
2. Locate and download the current Update Image (PI) for your PeopleSoft application.

The features and fixes required for Elasticsearch are delivered beginning with the following images:

- PeopleSoft Human Capital Management (HCM) 9.2.016
  - PeopleSoft Enterprise Learning Management (ELM) 9.2.013
  - PeopleSoft Financials and Supply Chain Management (FSCM) 9.2.015
  - PeopleSoft Customer Relationship Management (CRM) 9.2.011
  - PeopleSoft Interaction Hub (IH) 9.1.03
3. Include the relevant PeopleSoft application support bugs for Elasticsearch in your change package.

Review the following article to find the minimum PeopleSoft Update Image and necessary bugs for your PeopleSoft application that are required to implement Elasticsearch.

See PeopleSoft Applications Updates and Fixes for Elasticsearch, My Oracle Support, Doc ID 2181988.1.

## **Task 4-2: Setting Up the PeopleSoft Application for Elasticsearch**

---

This section discusses:

- Understanding the PeopleSoft Application Setup
- Setting Up Integration Broker for Non-DPK Installations
- Verifying PeopleSoft Roles for All Installations

## Understanding the PeopleSoft Application Setup

Make sure your PeopleSoft environment meets these requirements:

- The Integration Broker and the integration gateway are up and running.
  - If you installed your PeopleSoft application using DPKs, the Integration Broker configuration was performed as part of the installation.
  - If you did not use DPKs for installation, see *Setting Up Integration Broker for Non-DPK Installations*.
- The PeopleSoft roles required for Elasticsearch are set for both types of installation.

See *Verifying PeopleSoft Roles for All Installations*.

After you satisfy these requirements, and complete the subsequent tasks to configure and deploy Elasticsearch, test the connection on the Search Instance Properties page.

See *PeopleTools: Search Technology*, "Working with Search Instances."

### Task 4-2-1: Setting Up Integration Broker for Non-DPK Installations

If you installed your PeopleSoft application using the traditional installation media (VCDs), rather than DPKs, verify that Integration Broker is set up.

---

**Note.** If you installed using DPKs, Integration Broker was set up as part of the deployment.

---

The Integration Broker configuration includes the following setup tasks:

- Define the integration gateway.  
See *PeopleTools: Integration Broker Administration*, "Administering Integration Gateways."
- Define the integration gateway properties, including the keystore password setup.  
See *PeopleTools: Integration Broker Administration*, "Configuring Security and General Properties"
- Define service operations, including web services target and REST target locations.  
See *PeopleTools: Integration Broker Administration*, "Using the Target Locations Page to Set Target Locations for Services."
- Define nodes, including portal and content URIs.  
See *PeopleTools: Portal Technology*, "Defining Portal Nodes."

You can use the Integration Broker Activity Guide to carry out the necessary configuration. The activity guide provides centralized access to the PeopleSoft Pure Internet Architecture (PIA) pages used to configure PeopleSoft Integration Broker and the Integration Network.

See *PeopleTools: Integration Broker Administration*, "Understanding the Integration Broker Configuration Activity Guide."

You also have the option of configuring Integration Broker using the Automated Configuration Manager (ACM). See the product documentation for information on how to use the delivered plug-ins for Integration Broker configuration.

See *PeopleTools: Automated Configuration Manager*.

## Task 4-2-2: Verifying PeopleSoft Roles for All Installations

The user who will set up the Elasticsearch integration must have the Search Administration, Search Developer, Search Server and ACM Administration roles.

If not, the Security Administrator should add the roles as follows:

1. Sign in to the PeopleSoft application in a browser.
2. Select PeopleTools, Security, User Profiles, User Profiles.
3. Select a User ID.
4. On the User Profiles page, select the Roles tab.
5. Verify that the roles are present, or add them if necessary.

This example shows the Roles list with Search Administrator, Search Developer, and Search Server. The fourth required role, ACM Administration, is not shown here.

The screenshot shows the Oracle PeopleSoft User Profiles page for user ID VP1. The 'Roles' tab is selected, displaying a list of roles assigned to the user. The roles listed are:

Role Name	Description	Dynamic	Route Control	View Definition
Search Administrator	Search Administrator	<input type="checkbox"/>	Route Control	View Definition
Search Developer	Search Developer	<input type="checkbox"/>	Route Control	View Definition
Search Query Administrator	Sample - PTSF Query Access	<input type="checkbox"/>	Route Control	View Definition
Search Server	Search Server	<input type="checkbox"/>	Route Control	View Definition
Security Administrator	Security Administrator	<input type="checkbox"/>	Route Control	View Definition
Supplier Contract Interest	Sample - Supply Cntrct Intrest	<input type="checkbox"/>	Route Control	View Definition
Supplier Contract Administrator	Sample - Supply Contract Admin	<input type="checkbox"/>	Route Control	View Definition
Supplier-Application Administrator	Sample - Application Admin	<input type="checkbox"/>	Route Control	View Definition
System Administrator	System Administrator	<input type="checkbox"/>	Route Control	View Definition
Translation Utilities	Translation Utilities	<input type="checkbox"/>	Route Control	View Definition

The Search Administrator, Search Developer, and Search Server roles are highlighted in orange. The page also includes a 'Dynamic Role Rule' section on the left and a 'User Roles' table on the right. The 'User Roles' table has columns for Role Name, Description, Dynamic, Route Control, and View Definition. The 'Dynamic' column contains checkboxes, and the 'Route Control' column contains the text 'Route Control'. The 'View Definition' column contains the text 'View Definition'. The table also includes a 'Personalize' button and a 'Find' button. The 'Dynamic' column has a 'Dynamic' header. The 'Route Control' column has a 'Route Control' header. The 'View Definition' column has a 'View Definition' header. The table also includes a 'First' button, a 'Last' button, and a 'Page' indicator showing '81-90 of 99'.

User Profiles page: Roles

## Task 4-3: Adding and Configuring an Elasticsearch Instance

This section discusses:

- Using the Automated Configuration Management SEARCH\_TEMPLATE
- Using the Automated Configuration Management SES\_TEMPLATE
- Configuring the Search Instance on the Search Instance Properties Page

## Task 4-3-1: Using the Automated Configuration Management SEARCH\_TEMPLATE

The ACM framework enables you to store environment configuration settings in a template stored in the database or an external template file, which you can reapply when needed. You can use Automated Configuration Management (ACM) to configure the Elasticsearch instance. Using ACM allows you to automate the deployment and indexing.

See *PeopleTools: Automated Configuration Management*.

Beginning with PeopleTools 8.55.12 and later, use the ACM template SEARCH\_TEMPLATE to add and configure the Elasticsearch instance.

1. Verify that you have the ACM Administrator role, as mentioned in the previous section.  
See *Setting Up the PeopleSoft Application for Elasticsearch*.
2. Select PeopleTools, Automated Config Manager, ACM Templates, Template Definition.
3. Search for and open SEARCH\_TEMPLATE.
4. On the Configuration Template Definition page, verify that Configure Search Instance is selected, as in this example, and then click the Properties icon.

**Note.** Do not select Deploy Search Definition at this point.

**Configuration Template Definition**  
Define template to configure environment

Template Name: SEARCH\_TEMPLATE

\*Description: Search Configuration Template

Long Description: Search Configuration Template

**Configuration Plugins** Find First 1 of 1 Last

Group: SEARCH\_GROUP

Description: Configure, Deploy and Index Search

Plugin	Dependency Check	Properties	Pre/Post Condition		
<input checked="" type="checkbox"/> Configure Search Instance					
<input type="checkbox"/> Deploy Search Definition					

Edit Template Variables    Configuration Monitor    Process Monitor

Save    Execute    Functional Validation    Resolve Dependency

Configuration Template Definition page for SEARCH\_TEMPLATE

5. Specify the properties for the plug-in on the Configure Search Instance page.

The values that begin and end with an AT sign ("@") are ACM template variables that can be used across multiple plug-ins in the template. As mentioned, PeopleSoft Integration Broker configuration is required for these tasks. These variables will be taken from Integration Broker and shared. You do not have to manually fill them in at this point.

See *PeopleTools: Automated Configuration Management*.

This table describes the properties for the Configure Search Instance plug-in (PTSFConfigureSrchInstance). Use the properties to configure the PeopleSoft system to talk to Elasticsearch and assign roles.

Property	Default Value	Description
env.ptsf_search_instance	PTSF_SEARCH	Search instance name
env.search_provider	ES	Elasticsearch
env.search_nodes	1	The number of nodes that have been set up for the Elasticsearch cluster.  Elasticsearch provides High Availability by forming a cluster of multiple nodes. If you have set up a cluster with multiple nodes, specify the number here. The page expands with additional property fields for the multiple nodes.  <i>See PeopleTools 8.55: Search Technology</i> for information on High Availability.  See Adding Additional Elasticsearch Nodes for information on adding additional nodes.
env.node1_search_host	@searchhost@	The host name for the node. Enter the server name, including the domain, such as myhost.example.com, or an IP address.
env.node1_search_port	@searchport@	The port on which Elasticsearch listens for requests. Enter the value supplied when installing the Elasticsearch DPK. The default is 9200.

Property	Default Value	Description
env.node1_search_use_ssl	False	<p>Flag to determine whether the configuration is secure or non-secure. Valid values are:</p> <ul style="list-style-type: none"> <li>False — indicates non-secure (HTTP) configuration</li> <li>True — indicates secure (HTTPS) configuration.</li> </ul> <p>Set this property to true only when the PeopleSoft environment is configured for SSL and that URL has been used for the Elasticsearch callback.</p> <p>See <i>PeopleTools: Search Technology</i>, "Configuring SSL Between PeopleSoft and Elasticsearch."</p>
env.node1_search_admin_user	NA	<p>The administrative user for Elasticsearch, esadmin.</p> <p>You cannot change this user during the installation. After the installation is complete, you can use the <code>elasticsearchuser</code> script to add users and assign them administrative roles.</p> <p>See <i>PeopleTools: Search Technology</i>, "Creating User and Assigning Roles in Elasticsearch."</p>
env.node1_search_admin_password	NA	<p>The password supplied for the esadmin user when installing the Elasticsearch DPK.</p>
env.node1_search_read_user	NA	<p>The Elasticsearch proxy user, people.</p> <p>The proxy user cannot be changed during the installation.</p>
env.node1_search_read_password	NA	<p>The password supplied for the proxy user when installing the Elasticsearch DPK.</p>
env.search_call_back_user	@userid@	<p>The user ID for Elasticsearch to access the PeopleSoft system for access control list (ACL) values. This must be a valid PeopleSoft user ID with Search Server role assigned.</p> <p><b>Note.</b> It should not be necessary to change this value.</p>
env.search_call_back_password	NA	<p>Password for the call-back user ID.</p>

Property	Default Value	Description
env.ps_search_administrator_user	@userid@	Search administrator user name See Setting Up the PeopleSoft Application for Elasticsearch.
env.ps_search_developer_user	@userid@	Search developer user name See Setting Up the PeopleSoft Application for Elasticsearch.
env.gateway_host	@host@.@domain@	Host where the Integration Broker gateway is installed.
env.gateway_port	@httpport@	Port number for the Integration Broker gateway.
env.gateway_ssl_port	@sslport@	Gateway SSL port.
env.use_ssl_gateway	False	Flag to determine whether the gateway is secure or non-secure for callback. Valid values are: <ul style="list-style-type: none"> <li>• False — indicates non-secure (HTTP) configuration</li> <li>• True — indicates secure (HTTPS) configuration.</li> </ul> See <i>PeopleTools: Search Technology</i> , "Configuring SSL Between PeopleSoft and Elasticsearch."
env.default_local_node	@nodename@	Default local node
env.enable_global_menu_search	All	Enable global search and menu search for All, Local, or a comma-separated list or portals.

This example shows the left side of the page.

**Configure Search Instance**

Configuration Properties Find | View 15 First 1-20 of 20 Last

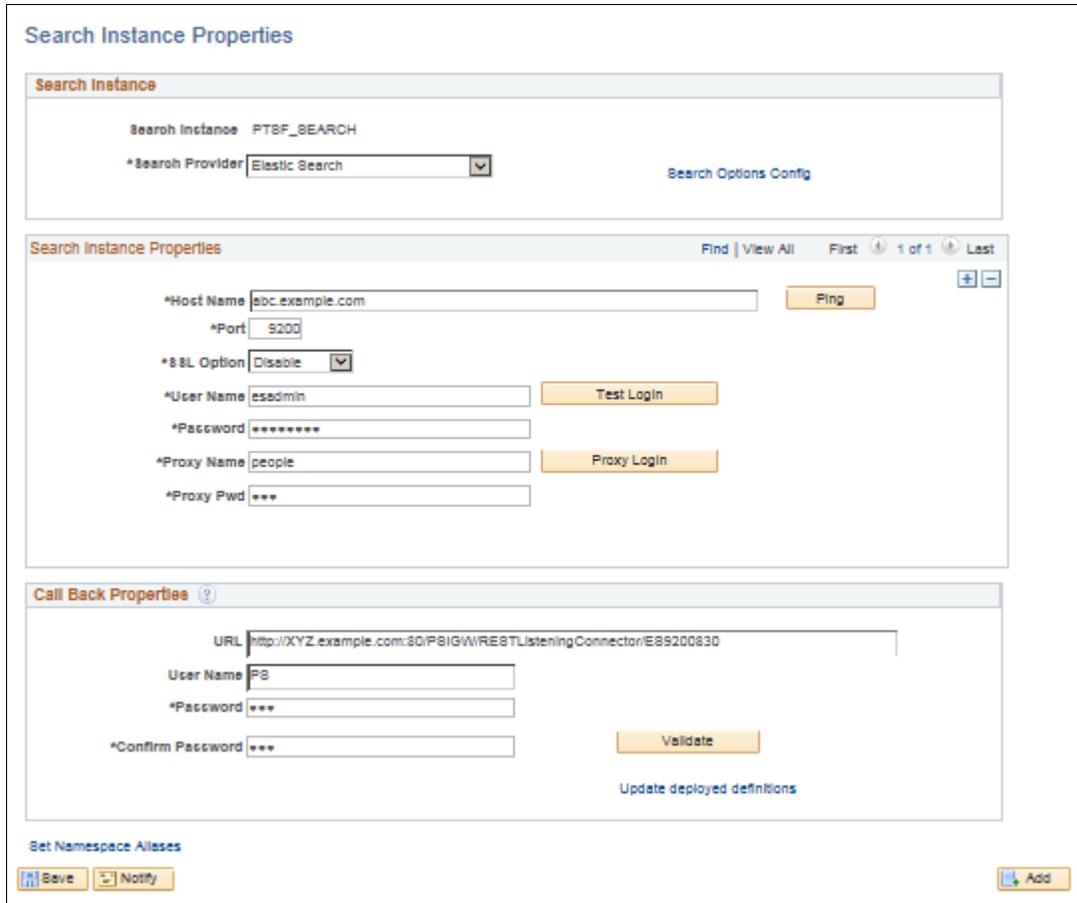
Property	Value	Prompt User?	
★ env.ptsf_search_instance	PTSF_SEARCH	<input type="checkbox"/>	?
★ env.search_provider	ES	<input type="checkbox"/>	?
★ env.search_nodes	1	<input type="checkbox"/>	?
env.node1_search_host	@searchhost@	<input type="checkbox"/>	?
env.node1_search_port	9200	<input type="checkbox"/>	?
env.node1_search_use_ssl	false	<input type="checkbox"/>	?
env.node1_search_admin_user	esadmin	<input type="checkbox"/>	?
env.node1_search_admin_password	<password>	<input type="checkbox"/>	?
env.node1_search_read_user	people	<input type="checkbox"/>	?
env.node1_search_read_password	<password>	<input type="checkbox"/>	?
★ env.search_call_back_user	@userid@	<input type="checkbox"/>	?
★ env.search_call_back_password	*****	<input type="checkbox"/>	?
env.ps_search_administrator_user	@userid@	<input type="checkbox"/>	?
env.ps_search_developer_user	@userid@	<input type="checkbox"/>	?
★ env.gateway_host	@host@@domain@	<input type="checkbox"/>	?
★ env.gateway_port	8000	<input type="checkbox"/>	?
env.gateway_ssl_port	8001	<input type="checkbox"/>	?
env.use_ssl_gateway	false	<input type="checkbox"/>	?
★ env.default_local_node	@nodename@	<input type="checkbox"/>	?
env.enable_global_menu_search	ALL	<input type="checkbox"/>	?

Configure Search Instance page

6. Save the template and click Execute to begin the program run.

- 7. To verify that the search instance page has been configured for Elasticsearch, select PeopleTools, Search Framework, Administration, Search Instance.

On the Search Instance Properties page, make sure the Search Provider is Elastic Search, and that the Callback URL includes RESTListeningConnector, as in this example:



Search Instance Properties page

- 8. Select PeopleTools, Automated Config Manager, ACM Templates, Template Definition.
- 9. Search for and open SEARCH\_TEMPLATE.
- 10. On the Configuration Template Definition page, verify that Deploy Search Definition is selected and click the Properties icon.

---

**Note.** Do not select Configure Search Instance.

---

## 11. Specify the properties for the plug-in on the Deploy Search Definition page and click OK.

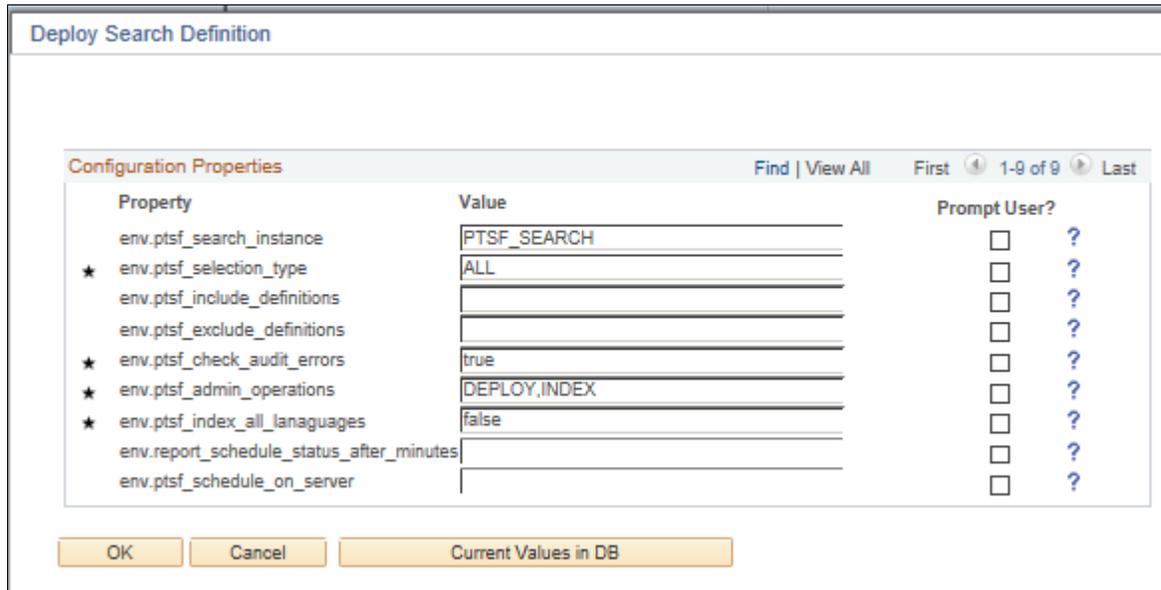
This table describes the properties for the Deploy Search Definition plug-in (PTSFAdministerSearch) in the SEARCH\_TEMPLATE. Use the plug-in to deploy, undeploy, and schedule index generation.

Property	Default Value	Description
env_ptsf_search_instance	PTSF_SEARCH	Elasticsearch instance name
env_ptsf_selection_type	GLOBAL	Valid values: <ul style="list-style-type: none"> <li>• ALL Deploys all search definitions and categories excluding the ones listed in env_ptsf_exclude_definitions.</li> <li>• GLOBAL Deploys search definitions and categories used for Global search.</li> <li>• LIST Deploys the search definitions and their categories mentioned in env_ptsf_include_definitions.</li> </ul>
env_ptsf_include_definitions	NA	Comma separated list of search category names to be included. You can use % as an operator in any part of the name. For example, EP_CS%, %CS_DOC%, %CS%DOC% and so on.
env_ptsf_exclude_definitions	NA	Comma separated list of search category names to be excluded. You can use % as an operator in any part of the name. For example, EP_CS%, %CS_DOC%, %CS%DOC% and so on.
env_ptsf_check_audit_errors	True	If true check for access to query/connected query, or invalid objects.  For a search definition if audit errors are found, it will not proceed further with the action specified in the ptsf_admin_operations property for this particular search definition. It will continue with the next one.

Property	Default Value	Description
env.ptsf_admin_operations	DEPLOY,INDEX	<p>Valid values:</p> <ul style="list-style-type: none"> <li>• DEPLOY — the search definitions will be deployed</li> <li>• INDEX — the search index will be scheduled.</li> </ul> <p>The INDEX option will create run control ids for both full indexing and incremental indexing, but schedules only full indexing for the first execution of the SEARCH_TEMPLATE. The full indexing run control ids will have the naming convention &lt;SearchDefinition&gt;_FULL and incremental indexing will have the naming convention &lt;SearchDefinition&gt;_INCR. When the SEARCH_TEMPLATE is executed the second and subsequent times, it will run incremental indexing only if the previously done FULL indexing is successful; otherwise it will again schedule full indexing.</p> <p><b>Note.</b> To schedule recurring incremental indexing, you must set the recurrence manually using the incremental run control ids created by ACM framework from the Schedule Index page. ACM will not do this automatically.</p> <ul style="list-style-type: none"> <li>• UNDEPLOY — the search definition will be removed.</li> <li>• DEPLOY,INDEX</li> </ul>
env.ptsf_index_all_languages	False	If true the schedules are created to index all languages.
env.report_schedule_status_after_minutes	NA	<p>Maximum minutes to wait before reporting scheduling status.</p> <ul style="list-style-type: none"> <li>• Enter 0 to wait till finish.</li> <li>• Leave blank to skip report.</li> <li>• Enter the time to wait to show status. For example, enter 5 to show the status once after 5 minutes.</li> </ul>

Property	Default Value	Description
env.ptsf_schedule_on_server	NA	Specify the Process Scheduler to run the indexing on. Leave this blank to use master scheduler.

This example shows the left-hand side of the page.



Deploy Search Definition page

12. Save the template and click Execute to begin the deployment.

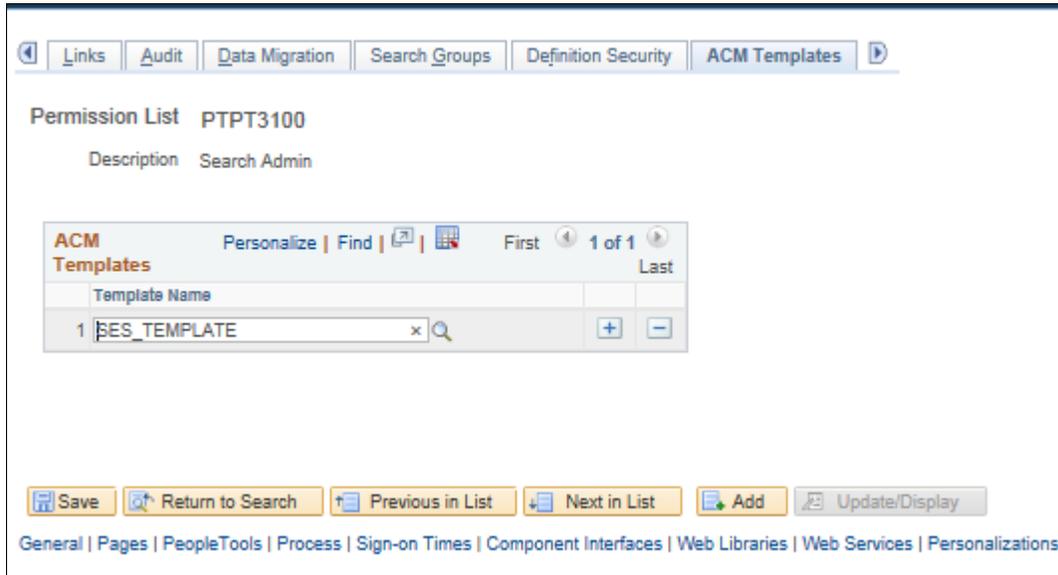
### Task 4-3-2: Using the Automated Configuration Management SES\_TEMPLATE

You can use Automated Configuration Management (ACM) to configure the search instance. For Elasticsearch installations with PeopleTools 8.55.11, use the instructions in this section to configure the ACM template SES\_TEMPLATE.

1. Verify that you have the ACM Administrator role, as mentioned in the previous section.  
See Setting Up the PeopleSoft Application for Elasticsearch.
2. Sign in to the PeopleSoft application in a browser and select PeopleTools, Security, Permission and Roles, Permission Lists.
3. Select the Search Admin permission list.

- 4. Select ACM Templates, and add the SES\_TEMPLATE if necessary.

This example shows the ACM Templates page for the Search Admin Permission List PTPT3100, with SES\_TEMPLATE added.



ACM Templates page for Permission List PTPT3100

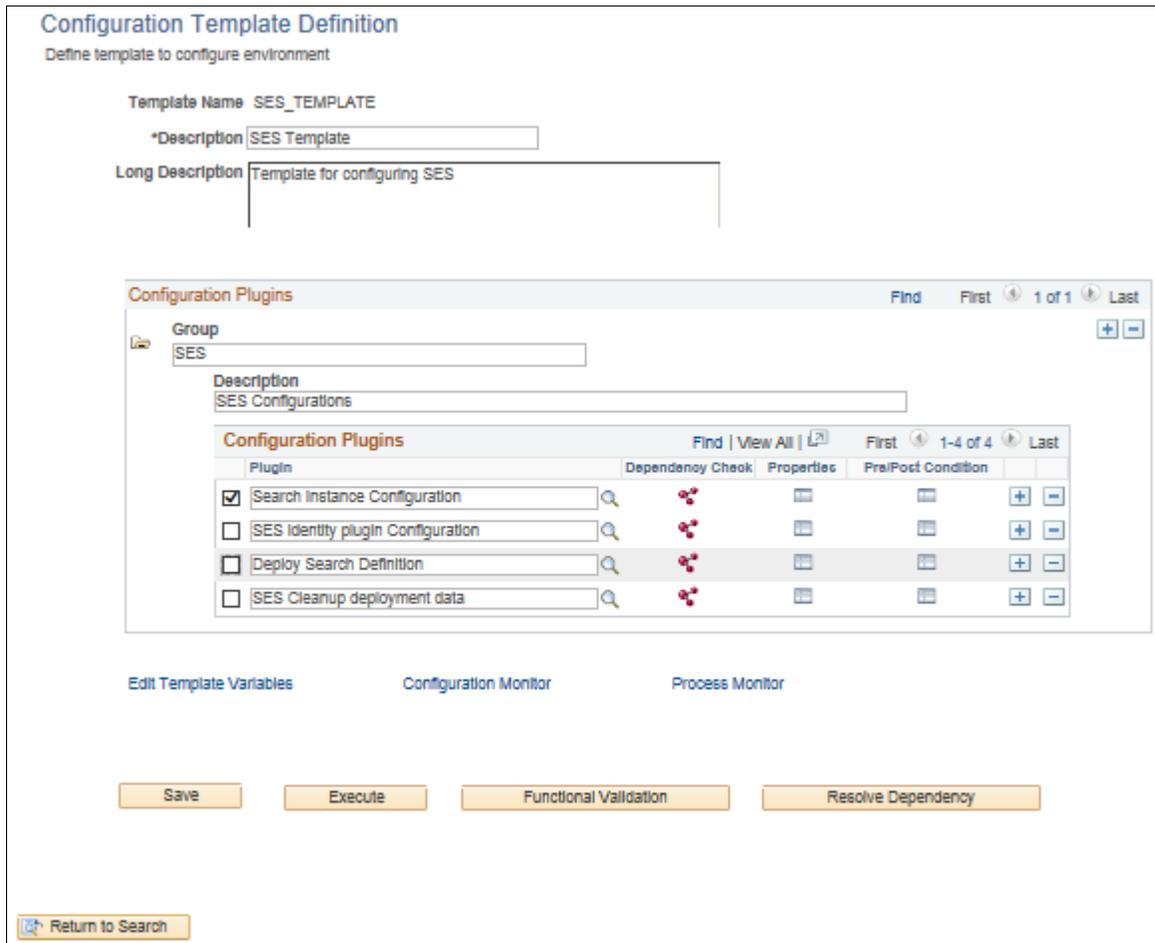
- 5. Select PeopleTools, Automated Config Manager, ACM Templates, Template Definition.
- 6. Search for and open SES\_TEMPLATE.

---

**Note.** If Integration Broker is not enabled on this system, use IB\_TEMPLATE instead.

---

- On the Configuration Template Definition page, under Configuration Plugins, verify that only Search Instance Configuration is selected, as in this example, and then click the Properties icon.



Configuration Template Definition page for SES\_TEMPLATE

8. Specify the information for the Search Instance Configuration (PTSFConfigureSearch) plug-in on the Search Instance Configuration page.

When the page first appears, enter the information in the required fields (indicated with an asterisk "\*"), and then click OK. This enables additional required fields.

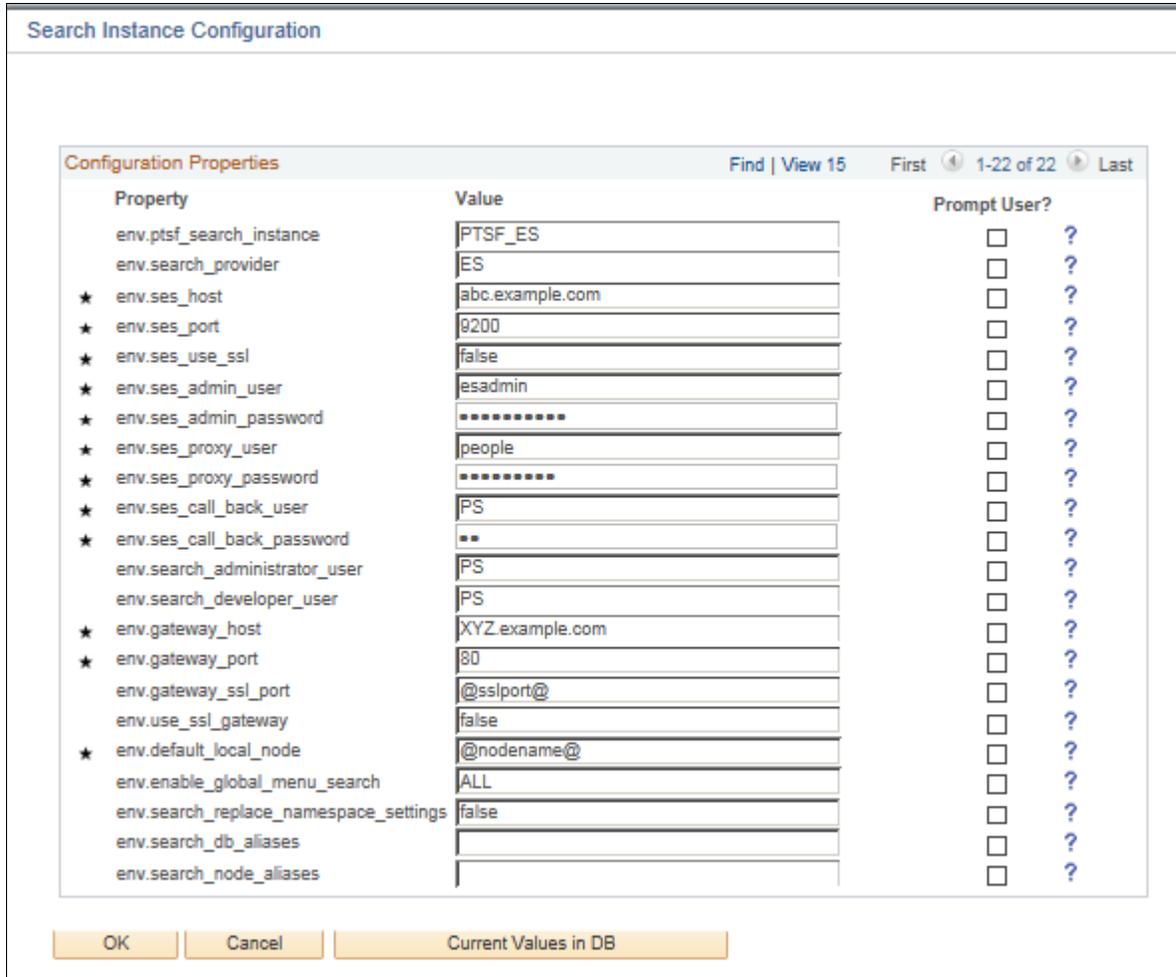
After entering all required information, click OK again.

This table describes the properties for the Configure Search Instance plug-in. Use the properties to configure the PeopleSoft system to talk to Elasticsearch and assign roles.

Property	Default Value	Description
env.ptsf_search_instance	PTSF_DEFAULT	Search instance name Be sure to change the env.ptsf_search_instance from the default value, such as PTSF_DEFAULT, to PTSF_ES, as shown in the example. Otherwise the Oracle SES instance will be updated rather than the Elasticsearch instance.
env.search_provider	SES	Change the default value to ES as shown in the example.
env.ses_host	@seshost@	The host where Elasticsearch is installed.
env.ses_port	@sesport@	The port for Elasticsearch.
env.ses_use_ssl	False	Flag to determine whether the configuration is secure or non-secure. Valid values are: <ul style="list-style-type: none"> <li>False — indicates non-secure (HTTP) configuration</li> <li>True — indicates secure (HTTPS) configuration.</li> </ul>
env.ses_admin_user	NA	The Elasticsearch administrative user, esadmin.
env.ses_admin_password	NA	The password supplied for the esadmin user when installing the Elasticsearch DPK.
env.ses_proxy_user	NA	The Elasticsearch proxy user. The default is people.
env.ses_proxy_password	NA	The password supplied for the proxy user when installing the Elasticsearch DPK.

Property	Default Value	Description
env.ses_call_back_user	@userid@	The user ID for Elasticsearch to call back to the PeopleSoft system to access services such as authentication.
env.ses_call_back_password	NA	Password for the call-back user ID.
env.search_administrator_user	@userid@	Search administrator user name See Setting Up the PeopleSoft Application for Elasticsearch.
env.search_developer_user	@userid@	Search developer user name See Setting Up the PeopleSoft Application for Elasticsearch.
env.gateway_host	@host@.@domain@	Host where the Integration Broker gateway is installed.
env.gateway_port	@httpport@	Port number for the Integration Broker gateway.
env.gateway_ssl_port	@sslport@	Gateway SSL port.
env.use_ssl_gateway	False	Flag to determine whether the Gateway is secure or non-secure for callback. Valid values are: <ul style="list-style-type: none"> <li>False — indicates non-secure (HTTP) configuration</li> <li>True — indicates secure (HTTPS) configuration.</li> </ul>
env.default_local_node	@nodename@	Default local node
env.enable_global_menu_search	All	Enable global search and menu search for All, Local, or a comma-separated list or portals.

This example shows the left side of the page.



Search Instance Configuration page

9. Save the template and click Execute to begin the configuration program run.
10. To deploy and index search definitions using ACM, the Elasticsearch search instance should be the default search instance for the user executing the ACM template.  
 Use these steps to set the user:
  - a. Select PeopleTools, Search Framework, Administration, Search Instance/User.
  - b. On the Search User Instance page, select a User ID with the ACM administrator role.
  - c. In the Search Instance field, select the Elasticsearch search instance and click Save.
  - d. If the user you added in step b is not the current user, sign out of the PeopleSoft application and sign back in as that user.
11. Select PeopleTools, Automated Config Manager, ACM Templates, Template Definition and select the SES\_TEMPLATE again.
12. On the Configuration Template Definition page, select Deploy Search Definition, and then click the Properties icon.

## 13. Specify the properties on the Deploy Search Definition page, and then click OK.

This table describes the properties for the Deploy Search Definition plug-in (PTSFAdministerSearch) in the SES\_TEMPLATE. Use the plug-in to deploy, undeploy, and schedule index generation.

Property	Default Value	Description
env.ptsf_selection_type	All	Valid values: <ul style="list-style-type: none"> <li>• ALL Deploys all search definitions and categories excluding the ones listed in env.ptsf_exclude_definitions.</li> <li>• GLOBAL Deploys search definitions and categories used for Global search.</li> <li>• LIST Deploys the search definitions and their categories mentioned in env.ptsf_include_definitions.</li> </ul>
env.ptsf_include_definitions	NA	Comma separated list of search category names to be included. You can use % as an operator.
env.ptsf_exclude_definitions	NA	Comma separated list of search category names to be excluded. You can use % as an operator.
env.ptsf_check_audit_errors	True	If true check for access to query/connected query, or invalid objects and stop if errors found.

Property	Default Value	Description
env.ptsf_admin_operations	DEPLOY,INDEX	<p>Valid values:</p> <ul style="list-style-type: none"> <li>• DEPLOY — the search definitions will be deployed</li> <li>• INDEX — the search index will be scheduled.</li> </ul> <p>The INDEX option will create run control ids for both full indexing and incremental indexing, but schedules only full indexing for the first execution of the SEARCH_TEMPLATE. The full indexing run control ids will have the naming convention &lt;SearchDefinition&gt;_FULL and incremental indexing will have the naming convention &lt;SearchDefinition&gt;_INCR. When the SEARCH_TEMPLATE is executed the second and subsequent times, it will run incremental indexing only if the previously done FULL indexing is successful; otherwise it will again schedule full indexing.</p> <p><b>Note.</b> To schedule recurring incremental indexing, you must set the recurrence manually using the incremental run control ids created by ACM framework from the Schedule Index page. ACM will not do this automatically</p> <ul style="list-style-type: none"> <li>• UNDEPLOY — the search definition will be removed.</li> <li>• DEPLOY,INDEX</li> </ul>
env.ptsf_index_all_languages	False	If true the schedules are created to index all languages.
env.report_schedule_status_after_minutes	NA	Maximum minutes to wait before reporting scheduling status. Enter 0 to wait till finish; leave blank to skip report.
env.ptsf_schedule_on_server	NA	Specify the Process Scheduler to run the indexing on. Leave this blank to use master scheduler.

This example shows the left-hand side of the page.

### Deploy Search Definition

Configuration Properties
Find | View All
First ◀ 1-8 of 8 ▶ Last

Property	Value	Prompt User?	
★ env.ptsf_selection_type	ALL	<input type="checkbox"/>	?
env.ptsf_include_definitions		<input type="checkbox"/>	?
env.ptsf_exclude_definitions		<input type="checkbox"/>	?
★ env.ptsf_check_audit_errors	true	<input type="checkbox"/>	?
★ env.ptsf_admin_operations	DEPLOY,INDEX	<input type="checkbox"/>	?
★ env.ptsf_index_all_languages	false	<input type="checkbox"/>	?
env.report_schedule_status_after_minutes		<input type="checkbox"/>	?
env.ptsf_schedule_on_server		<input type="checkbox"/>	?

OK
Cancel
Current Values in DB

Deploy Search Definition page

14. Save the template and click Execute to begin the configuration program run.

15. To verify that the search instance page has been configured for Elasticsearch, select PeopleTools, Search Framework, Administration, Search Instance.

On the Search Instance Properties page, make sure the Search Provider is Elastic Search, and that the Callback URL includes RESTListeningConnector, as in this example:

**Search Instance Properties**

**Search Instance**

Search Instance: PTSF\_ES

\*Search Provider: Elastic Search Search Options Config

---

**Search Instance Properties** Find | View All | First 1 of 1 Last

\*Host Name: abc.example.com Ping

\*Port: 9200

\*SSL Option: Disable

\*User Name: esadmin Test Login

\*Password: \*\*\*

\*Proxy Name: people Proxy Login

\*Proxy Pwd: \*\*\*

---

**Call Back Properties** ?

URL: http://XYZ.example.com:80/PSIGWRESTListeningConnector/ES9200830

User Name: PS

\*Password: \*\*\*

\*Confirm Password: \*\*\* Validate

Update deployed definitions

Set Namespace Aliases

Save Notify Add

Search Instance Properties page

### Task 4-3-3: Configuring the Search Instance on the Search Instance Properties Page

If you need to add other search instances, you also have the option of adding the search instance using the Search Instance Properties page mentioned in the previous section. See the section on working with search instances in the product documentation.

**Note.** This initial configuration can be done instead of the ACM configuration described above, but one benefit of using the ACM Deploy option is that it will build run controls for the user running the ACM.

See *PeopleTools 8.55: Search Technology*, "Administering PeopleSoft Search Framework."



## Chapter 5

# Performing Additional Tasks

This chapter discusses:

- Modifying the Elasticsearch Configuration File (Optional)
- Starting and Stopping an Elasticsearch Service
- Adding Additional Elasticsearch Nodes
- Bringing Up an Elasticsearch Node
- Using the Elasticsearchuser Script
- Adding Elasticsearch as a Service in Linux

## Task 5-1: Modifying the Elasticsearch Configuration File (Optional)

---

If you need to override the default values provided by the Elasticsearch software, you can use the `elasticsearch.yml` file. Go to the `ES_HOME/config` directory to locate the `elasticsearch.yml` file, and modify it in a text editor for your environment. It is probably a good idea to make a backup copy before modifying the file.

**Note.** Because the Elasticsearch DPK setup script automates the configuration, modifying `elasticsearch.yml` should not normally be necessary.

---

- `cluster.name` — a unique name for the cluster.  
This parameter identifies the cluster for auto-discovery. Make sure the name is unique. Do not reuse the same cluster names in different environments, because you might end up with nodes joining the wrong cluster.
- `node.name` — any meaningful name, such as `hostname`, which would make it easy to identify where the node is running.
- `path.data` — the path to the location where you want to store the Elasticsearch data.  
To include multiple paths, use commas to separate the paths.
- `path.logs` — the path to the location where you want to store the Elasticsearch logs.
- `bootstrap.mlockall` — if set to `True`, this parameter locks the memory when the Elasticsearch instance is started.  
The recommendation is to set this to `True`.
- `network.host` — the IP address or hostname of the machine.
- `http.port` — the port where Elasticsearch should listen for incoming requests.  
Set this property whether or not SSL is configured. Elasticsearch can work either in `https` or `http` mode, but not in both modes at the same time.

- `discovery.zen.ping.unicast.hosts` — the list of hosts that the node has to ping to discover other nodes to join the cluster.  
Elasticsearch nodes will find each other via unicast. Provide the address in the format: ["host1", "host2"].
- `discovery.zen.minimum_master_nodes` — configure the majority of nodes ((total number of master nodes / 2) + 1) in order to avoid an issue referred to as "split brain."  
For information on setting up nodes and the definition of "split brain" see the Elasticsearch product documentation.
- `gateway.expected_nodes` — the number of data or master nodes that are expected to be in the cluster.  
Recovery of local shards will start as soon as the expected number of nodes have joined the cluster.

---

**Note.** This parameter may be specified in the `elasticsearch.yml` file as needed.

---

- `gateway.recover_after_nodes` — the number of data or master nodes required for recovery.  
Recovery will take place as long as this many data or master nodes have joined the cluster. Once the `recover_after_time` duration has passed, (the default is 5 minutes), recovery will start as long as the `gateway.recover_after_nodes` condition is met. Whenever you add a new user or role to Elasticsearch, make sure that it is added to each of the nodes.
- `node.max_local_storage_nodes` — the number of nodes on a single system  
Enter "1" to disable multiple nodes on a single system.
- `action.destructive_requires_name` — When set to *True*, this will require explicit names when deleting indexes.
- `orclssl.http.ssl` — enable or disable https  
Accepts values true or false.
- `orclssl.transport.ssl` — enable or disable transport layer encryption  
Accepts values true or false.
- `orclssl.keystore` — path to the keystore  
The keystore file must be placed under *ES\_HOME/config*.
- `orclssl.keystore_password` — keystore password.  
Provide an encrypted password, which is obtained using the encryption mechanism in `elasticsearchuser` script.  
See *Using the Elasticsearchuser Script*.
- `orclssl.truststore` — path to the truststore  
The truststore file must be placed under *ES\_HOME/config*.
- `orclssl.truststore_password` — truststore password  
Provide an encrypted password which is obtained using the encryption mechanism in `elasticsearchuser` script.  
See *Using the Elasticsearchuser Script*.
- `acl.cache.delete.interval` — Interval to run the delete process to clear the ACL security values cache. By default it is 24h.
- `acl.cache.delete.bulk_size` — Number of deletions to run in one bulk delete request.  
By default it is 10000.

## **Task 5-2: Starting and Stopping an Elasticsearch Service**

---

This section discusses:

- Starting and Stopping an Elasticsearch 2.3.2 Service on Windows
- Starting and Stopping an Elasticsearch 6.1.2 Service on Windows
- Starting and Stopping an Elasticsearch Process on Linux

### **Task 5-2-1: Starting and Stopping an Elasticsearch 2.3.2 Service on Windows**

If you modify the `elasticsearch.yml` file, use these instructions to stop and restart the Elasticsearch services.

On Microsoft Windows, the Elasticsearch service is installed by the DPK setup script.

1. Open a command prompt, and change directory to `ES_HOME/bin`.
2. To see the usage for the service command:

```
service
service.bat install|remove|start|stop
```

3. To stop and remove the Elasticsearch service:

```
service.bat remove
```

4. To start the service, run these commands from `ES_HOME/bin`:

```
service.bat install
service.bat start
```

### **Task 5-2-2: Starting and Stopping an Elasticsearch 6.1.2 Service on Windows**

If you modify the `elasticsearch.yml` or `jvm.options` file, use these instructions to stop and restart the Elasticsearch services.

On Microsoft Windows, the Elasticsearch service is installed by the DPK setup script.

1. Open a command prompt, and change directory to `ES_HOME/bin`.
2. To see the usage for the service command:

```
elasticsearch-service
elasticsearch-service.bat install|remove|start|stop|manager [SERVICE_ID]
```

3. To stop and remove the Elasticsearch service:

```
elasticsearch-service.bat remove
```

4. To start the service, run these commands from `ES_HOME/bin`:

```
elasticsearch-service.bat install
elasticsearch-service.bat start
```

### Task 5-2-3: Starting and Stopping an Elasticsearch Process on Linux

On Linux to start and stop the process, for either Elasticsearch 2.3.2 or Elasticsearch 6.1.2:

1. In a terminal window, change directory to *ES\_HOME/bin*.
2. To start the Elasticsearch process:
 

```
nohup ./elasticsearch &
```
3. To stop the process:
  - a. Use this command to find the Elasticsearch process ID:
 

```
ps -ef | grep elas
```
  - b. Use this command to stop the process, substituting the process ID for pid:
 

```
kill <pid>
```

### Task 5-3: Adding Additional Elasticsearch Nodes

---

Use these steps to add an additional Elasticsearch node after you have completed the Elasticsearch DPK installation. The additional node will be added to the same cluster.

1. Install Elasticsearch on a second server and provide the following information during the DPK setup script:
  - For the cluster name, specify the same name as that of the first Elasticsearch node.
  - At the prompt "Enter the host name of nodes which are already member of a cluster", specify the IP address for the first Elasticsearch node.
2. On the second Elasticsearch node (the second server), open *ES\_HOME/config/elasticsearch.yml* for editing.
3. In *elasticsearch.yml*, set the value for *discovery.zen.minimum\_master\_nodes* to  $(N/2) + 1$  where *N* is the number of nodes in the Elasticsearch cluster, including the new one being added.
 

To avoid "split brain" problem, it is always recommended to have an odd number of nodes (*N*) in the cluster if *N* is less than 4. For more information, search for details about configuring minimum master nodes in the Elasticsearch online help.

See Elastic Web site, <https://www.elastic.co/>.
4. Stop and restart the second Elasticsearch node.
 

See Starting and Stopping an Elasticsearch Service.

### Task 5-4: Bringing Up an Elasticsearch Node

---

This section discusses:

- Bringing Up a Node for Elasticsearch 2.3.2
- Bringing Up a Node for Elasticsearch 6.1.2

#### Task 5-4-1: Bringing Up a Node for Elasticsearch 2.3.2

If one of the nodes in an existing cluster is down, use these steps to bring it up:

1. Open `ES_HOME/config/elasticsearch.yml` for editing.  
See [Modifying the Elasticsearch Configuration File](#).
2. Set the value for `discovery.zen.minimum_master_nodes` to  $(N/2) + 1$  where N is the number of nodes in the Elasticsearch cluster including the one that is being brought up.
3. If you are running on Linux, set these environment variables:

- `export ES_HEAP_SIZE= 6G`

---

**Note.** Set the value for `ES_HEAP_SIZE` to a value equal to or less than 50% of available memory, and not exceeding 30G.

---

- `export JAVA_HOME= BASE_DIR/pt/es_jre1.8.0_yy`

4. Start the Elasticsearch node.

See [Starting and Stopping an Elasticsearch Service](#).

## Task 5-4-2: Bringing Up a Node for Elasticsearch 6.1.2

If one of the nodes in an existing cluster is down, use these steps to bring it up:

1. Open `ES_HOME/config/elasticsearch.yml` for editing.  
See [Modifying the Elasticsearch Configuration File](#).
2. Set the value for `discovery.zen.minimum_master_nodes` to  $(N/2) + 1$  where N is the number of nodes in the Elasticsearch cluster including the one that is being brought up.
3. If you are running on Linux, verify these settings:

- Verify that the heap size is set to a value equal to or less than 50% of available memory, and not exceeding 30G.

See "Preparing to Deploy," [Reviewing Elasticsearch Recommendations](#).

- `export JAVA_HOME= BASE_DIR/pt/es_jre1.8.0_yy`

4. Start the Elasticsearch node.

See [Starting and Stopping an Elasticsearch Service](#).

## Task 5-5: Using the Elasticsearchuser Script

---

To add users or roles after installation, use the `elasticsearchuser` script, found in `ES_HOME/bin`. The `elasticsearchuser` script has the following uses:

- To add a new user or change password for a user:

```
elasticsearchuser adduser [user]
```

- To add roles for an existing user:

```
elasticsearchuser addrole [user]
```

- To view existing users:

```
elasticsearchuser listusers
```

- To view roles of a user:

```
elasticsearchuser listrole [user]
```

- To remove a user:

```
elasticsearchuser removeuser [user]
```

- To encrypt the given text:

```
elasticsearchuser encrypt [text]
```

This is used for encrypting the keystore password while configuring SSL. The password needs to be encrypted in the `elasticsearch.yml` file.

## Task 5-6: Adding Elasticsearch as a Service in Linux

---

This section discusses:

- Prerequisites
- Adding an Elasticsearch Service
- Verifying Automatic Startup
- Removing the Elasticsearch Service

### Prerequisites

Use the instructions in this section to run Elasticsearch as a service on a Linux host, and to start automatically upon rebooting. Ensure that you fulfill these requirements:

- The Elasticsearch process should not be running.  
If Elasticsearch is running, ensure that it is not being used, and then kill the process.  
See [Starting and Stopping an Elasticsearch Service](#).
- The script to install the service must be run by the root user.
- Elasticsearch is installed on the Linux server where you run this procedure.
- The Elasticsearch and JRE installation folders are located under the DPK base folder; that is:
  - The DPK base folder is referred to in this documentation as *BASE\_DIR*, such as `/home/es232`.
  - The Elasticsearch installation directory, *ES\_HOME*, is found in `BASE_DIR/pt/es2.3.2`.
  - The Java installation directory, *JAVA\_HOME*, is found in `BASE_DIR/pt/es_jre1.8.0_yy`, where *yy* is the JRE version.
- Elasticsearch must be run by the user who owns *ES\_HOME*.  
This is due to the fact that the script does not input the user name.
- You have downloaded and extracted the required Elasticsearch DPK for Linux, in a directory referred to as *ES\_INSTALL*.

### Task 5-6-1: Adding an Elasticsearch Service

The script to add or delete the service uses the following arguments:

- `-h` or `--help`  
Show the help message and exit

- `--add`  
An Elasticsearch service will be added.
- `--delete`  
The Elasticsearch service will be removed.
- `--install_base_dir INSTALL_BASE_DIR`  
Enter the base directory where Elasticsearch is installed.

To add Elasticsearch as a service:

1. Open a terminal window, running as root.
2. Change directory to `ES_INSTALL/setup`:  
`cd ES_INSTALL/setup`
3. Run this command to add the service:  
`# ./psft-es-service.sh --add --install_base_dir BASE_DIR`
4. Use one of these methods to verify that the service was added:
  - The output of the following `ps` command must show a running Elasticsearch process:  
`# ps -ef | grep elastic`
  - Use this `chkconfig` command:  
`# chkconfig --list | grep elastic`  
  
This should give an output such as:  
`elasticsearch 0:off 1:off 2:on 3:on 4:on 5:on 6:off`
  - Use this service command:  
`# service elasticsearch status`  
  
This should give an output such as:  
`elasticsearch (pid 21292) is running...`

## Task 5-6-2: Verifying Automatic Startup

After you install the Elasticsearch service and verify the installation, test to make sure the service starts automatically after you reboot the Linux server.

1. Reboot the Linux server.
2. Use this command to verify that the service has come up automatically:  
`# service elasticsearch status`  
  
This should give an output such as:  
`elasticsearch (pid 5028) is running...`

## Task 5-6-3: Removing the Elasticsearch Service

To remove the Elasticsearch service:

1. Open a terminal window, running as root.
2. Change directory to *ES\_INSTALL/setup*:  

```
cd ES_INSTALL/setup
```
3. Run this command to remove the service:  

```
# ./psft-es-service.sh --delete
```
4. Use one of these methods to verify that the service was deleted:
  - The output of the following `ps` command should not include any Elasticsearch process:  

```
# ps -ef | grep elastic
```
  - This `chkconfig` command should give an empty output:  

```
# chkconfig --list | grep elastic
```
  - Use this service command:  

```
# service elasticsearch status
```

This should give an output such as:

```
elasticsearch: unrecognized service
```

## Appendix A

# Using the Supplemental Elasticsearch DPK Setup Scripts

This appendix discusses:

- Understanding the Elasticsearch DPK Setup Scripts
- Using the Supplemental Elasticsearch DPK Script on a Linux Host
- Using the Supplemental Elasticsearch DPK Script on a Microsoft Windows Host
- Using Customizations with the Elasticsearch Installation

## Understanding the Elasticsearch DPK Setup Scripts

---

The current revision of the Elasticsearch DPK includes two types of setup scripts.

- The `psft-dpk-setup.bat` and `psft-dpk-setup.sh` scripts can be used to install or upgrade Elasticsearch. These scripts are described in the chapter "Deploying the Elasticsearch Deployment Package." Note that these scripts do not install the Puppet software automatically.
- The scripts that were delivered with the earlier revisions of the Elasticsearch DPK have been renamed `psft-dpk-puppet-setup.ps1` and `psft-dpk-puppet-setup.sh`. Use these scripts if you need to install Puppet on your environment. The usage is described in this appendix.
- The `psft-dpk-puppet-setup.ps1` and `psft-dpk-puppet-setup.sh` scripts described in this appendix are supported for both the Elasticsearch 2.3.2 and 6.1.2 DPKs.

## Task A-1: Using the Supplemental Elasticsearch DPK Script on a Linux Host

---

This section discusses:

- Using the `psft-dpk-puppet-setup.sh` Script
- Verifying the Elasticsearch Installation on Linux
- Performing Post-Installation Steps on Linux
- Removing the Elasticsearch Installation from Linux
- Troubleshooting the Elasticsearch Removal from Linux

## Task A-1-1: Using the `psft-dpk-puppet-setup.sh` Script

The Elasticsearch DPK deployment creates an Elasticsearch cluster with a single Elasticsearch node. Briefly, an Elasticsearch node refers to the server where Elasticsearch is installed, and the cluster is comprised of nodes which all have the same cluster name. The DPK setup script asks for the cluster name and the names of existing nodes. If you provide an existing cluster name and list of existing nodes, the existing nodes will join the cluster. For information on adding additional nodes after installation, see the section [Adding Additional Elasticsearch Nodes](#).

See "Performing Additional Tasks," [Adding Additional Elasticsearch Nodes](#).

For information on Elasticsearch concepts mentioned in this task, such as clusters and nodes, see the PeopleTools product documentation and the Elasticsearch online help.

See *PeopleTools 8.55: Search Technology*, PeopleTools Elasticsearch Home Page (select the tab Elasticsearch on PeopleTools 8.55), My Oracle Support, Doc ID 2205540.2.

See Elasticsearch online help, <https://www.elastic.co/guide/en/elasticsearch/guide/current/index.html>.

Use this procedure on physical or virtual Linux hosts. This procedure assumes:

- You have downloaded the required Elasticsearch DPK for Linux, and saved it in a newly created directory accessible to the Linux host, referred to as `ES_INSTALL`.
- There is enough space on the Linux host for the Elasticsearch installation.
- There is a writable directory available as the Elasticsearch user's home. The default is `/home`.
- The user running the script *must have root access*.

Make a note of the values you supply for ports, passwords, and so on. When you configure the Elasticsearch instance for PeopleSoft, the values must match those specified here.

1. Open a terminal window as a root user.
2. Change directory to `ES_INSTALL`.

```
cd ES_INSTALL
```

3. Extract the first zip file (for example, `ELASTICSEARCH-DPK-LNX-2.3.2_xx.zip` or `V123456-01.zip`) in the same directory, `ES_INSTALL`.

---

**Note.** It is a good idea to extract into the same directory where you downloaded the zip file, and to extract into an empty directory for each new installation.

---

```
unzip ELASTICSEARCH-DPK-LNX-2.3.2_xx.zip
```

---

**Note.** Be sure to extract into the same directory where you downloaded the zip file.

---

The extraction creates the following directories in `ES_INSTALL`:

- `setup` directory — includes the setup scripts
  - `puppet` directory — includes the open-source Puppet software required for the deployment
  - `archives` directory — includes archives for deployment
  - `readme.txt` file
  - `es-manifest` file — includes the version information about Elasticsearch and JRE provided in the DPK.
4. Change directory to `ES_INSTALL/setup`.

5. As root user, run the DPK setup script as follows:

---

**Note.** There must be a double dash in front of the script options; for example, `--env_type`.

---

```
./psft-dpk-puppet-setup.sh --env_type es
```

The script assumes that the downloaded DPK is in the parent directory of the setup script. If the DPK is located in a different directory, you can use this command, where the `--dpk_src_dir` option specifies the full path of the downloaded DPK:

```
./psft-dpk-puppet-setup.sh --dpk_src_dir <full_path_dpk_src> --env_type=>
es
```

6. Specify whether to install the Puppet software if necessary at the next prompt.

The script verifies if Puppet software is installed on the host. If not, answer *y* (yes) to install the Puppet software and *n* to abort the setup process. The default action (if nothing is entered at the prompt) is to install the software.

If there is any error during the Puppet software installation, the script aborts the setup process. Review the log file in *ES\_INSTALL/setup*.

```
Starting the PeopleSoft Environment Setup Process:
Verifying if Puppet Software is Installed on the Host:
```

```
Puppet Software is not installed on the Host. If this Host is
used to setup a PeopleSoft environment, Puppet Software should
be Installed.
```

```
Do you want to Install Puppet Software on this Host? [Y|n]: y
```

```
Installing Puppet Software on the Host: [ OK ]
```

The script verifies if the DPK is available in *ES\_INSTALL*, and aborts with the message [FAILED] if it is not.

```
Preparing the OracleLinux VM for ES Environment:
```

```
Checking if ES DPKs are Present in the Filesystem: [ OK ]
```

7. At the following prompt, enter a location that is accessible to the host to be used as the base directory.

The base directory, referred to as *BASE\_DIR* in this documentation, is used to extract the DPK as well as for deploying Elasticsearch components. The directory */opt/psft* is used in this example:

```
The base directory is used to extract the ES DPKs.
This directory should be accessible
on the host, has write permission, and has enough free space.
```

```
Please Enter the ES Base Folder [/opt/oracle/psft]: /opt/psft
Are you happy with your answer? [y|n|q]: y
```

The script validates if there is enough free space available under the specified base directory for the Elasticsearch environment. The Elasticsearch setup is aborted if there is not enough free space.

See Prerequisites.

```
Checking if directory /opt/psft has Enough Space: [ OK ]
```

8. If the default home directory is not writable, enter a new location at the following prompt.

```
Checking if Default User Home Directory /home is Writable: [FAILED]
```

The ES environment setup creates local users on the VM.  
The default Home directory for these users is /home. Please ensure this directory is writable or provide a new directory on the VM that is writable.

```
Please Enter a directory on the VM that is writable [/home]: /ds1
Are you happy with your answer? [y|n|q]:
```

If the /home directory is writable, no response is required.

```
Checking if Default User Home Directory /home is Writable: [ OK ]
```

9. Review the status messages as the script validates the files found in the shared folder.

10. Enter the password two times for the Elasticsearch administrative user esadmin, at the following prompt.

The esadmin user is used to authenticate requests on Elasticsearch. The prompt includes the requirements for the password. Note that you do not see any characters as you enter the password.

```
Enter a password for Elasticsearch admin user [esadmin]. Please ensure
that the password has at least 9 characters with at least
one upper case and one number:
Re-Enter a Elasticsearch admin user password:
```

11. Enter the password for the Elasticsearch proxy user, people.

Note that this is not the same user as the PeopleSoft connect ID, which also has people as the default value. The prompt includes the requirements. The password is not visible as you type, and the window does not display masking characters. There is no default password.

```
Enter a password for Elasticsearch proxy user [people]. Please ensure
that the password has at least 9 characters with at least
one upper case and one number:
Re-Enter a Elasticsearch proxy user password:
```

12. Enter the name for the Elasticsearch cluster.

```
Enter cluster name:
```

13. Enter the Elasticsearch HTTP port.

This is the port on which Elasticsearch listens for requests. The default is 9200.

```
Enter http port [9200]:
```

14. Enter the host name for any nodes that are already members of a cluster.

Enclose one or more host names in square brackets, with the host name or IP address in double quotes. For example, for one host, enter [ "host1.example.com" ]. Use commas to list two or more hosts; for example, [ "host1.example.com", "127.0.0.1" ].

```
Enter host name of nodes which are already member of a cluster =>
[["127.0.0.1", "[::1]"]]:
```

15. Enter the heap size.

See Prerequisites

```
Enter heap size in GB which is less than 30(Enter only numeric values): =>
6
```

## 16. Review the status messages as the script runs Puppet profiles to set up the Elasticsearch environment.

```

Setting up Puppet on the Host:
Copying PeopleSoft Puppet Modules:           [ OK ]
Updating the Puppet Hiera YAML Files:        [ OK ]
Updating the Role in Puppet Site File for the Host: [ OK ]

Setting up System Settings:                  [ OK ]
Deploying Elasticsearch Application Components: [ OK ]
Setting up Elasticsearch Server:             [ OK ]

```

Upon successful completion, the DPK setup script displays the following message:

```
The initialization of PeopleSoft ES es es environment is successful.
```

A successful deployment includes the following:

- The complete setup log is written to the file `psft-dpk-puppet-setup.log` in the `ES_INSTALL/setup` directory.
- The Elasticsearch home directory is found in `BASE_DIR/pt/es2.3.2`.
- The `ES_HOME` environment variable is set to `BASE_DIR/pt/es2.3.2`.
- Java is installed to `BASE_DIR/pt/es_jre1.8.0_yy`, where `yy` is the JRE version.
- The `JAVA_HOME` environment variable is set to `BASE_DIR/pt/es_jre1.8.0_yy`.
- On Linux, the script sets up a system user, "esuser" for use by the DPK scripts.

## Task A-1-2: Verifying the Elasticsearch Installation on Linux

To verify the installation, in a terminal window, ensure that the following command gives an output:

```
ps -ef | grep elas
```

After verifying the process, use one of the following methods to verify the Elasticsearch installation.

- Run a REST call.

This example uses the CURL utility for the REST call:

```
curl --user <username>:<password> -XGET http://<host>:<port>
```

- Open a browser and enter the following URL:

```
http://<username>:<password>@<host>:<port>/
```

For both the REST command and the browser URL, use these definitions:

- `username` — the Elasticsearch user administrator, `esadmin`
- `password` — the password you entered during the DPK setup script installation
- `host` — the Elasticsearch host name
- `port` — Elasticsearch (REST) port that you entered during the DPK setup script installation

In both cases, you should see a message similar to the following:

```
{
  "name" : "abc.abc.com",
  "cluster_name" : "ESCLUSTER",
  "version" : {
    "number" : "2.3.2",
```

```

    "build_hash" : "b9e4a6acad4008027e4038f6abed7f7dba346f94",
    "build_timestamp" : "2016-04-21T16:03:47Z",
    "build_snapshot" : false,
    "lucene_version" : "5.5.0"
  },
  "tagline" : "You Know, for Search"
}

```

After you complete the Elasticsearch installation, you must configure the integration with the PeopleSoft environment.

See "Integrating Elasticsearch with the PeopleSoft Environment."

### Task A-1-3: Performing Post-Installation Steps on Linux

After you complete the Elasticsearch DPK installation, if you want to perform operations described later in this chapter, such as starting and stopping Elasticsearch, or running the `elasticsearchuser` script, perform the manual steps described in this section.

In a terminal for the current session, set the following environment variables:

- Set the value for `ES_HEAP_SIZE` to a value equal to or less than 50% of available memory, and not exceeding 30G; for example:

```
export ES_HEAP_SIZE= 6G
```

- Set `JAVA_HOME` to the location installed by the DPK setup script; for example:

```
export JAVA_HOME= BASE_DIR/pt/es_jre1.8.0_yy
```

### Task A-1-4: Removing the Elasticsearch Installation from Linux

To remove the Elasticsearch installation from Linux:

1. Open a terminal window as a root user.
2. Go to `ES_INSTALL/setup` and run the following command:

```
./psft-dpk-puppet-setup.sh --env_type es --cleanup
```

To specify the full path of the downloaded DPK, you can use the `--dpk_src_dir` option:

```
./psft-dpk-puppet-setup.sh --dpk_src_dir <full_path_dpk_src> --env_type=>
es --cleanup
```

3. Review the cleanup log file in `ES_INSTALL/setup`.

### Task A-1-5: Troubleshooting the Elasticsearch Removal from Linux

This section includes advanced steps to be used only if the previous procedures in this section failed. If the cleanup process on Linux was not totally successful, the `BASE_DIR` directories may not be entirely cleared, or you may have trouble when carrying out another deployment. To remove the installation manually:

1. Run the cleanup command as described in the previous section.
2. If the script displays a FAILED message, run it again.
3. If it succeeds, check the `BASE_DIR` folders to be sure everything has been deleted.

4. If the *BASE\_DIR* folders are not clear, or if a subsequent deployment is not successful, carry out the next steps.
5. Determine the Elasticsearch process ID with this command:
 

```
ps -ef |grep elas
```
6. Stop the process, substituting the Elasticsearch process ID for <pid>:
 

```
kill <pid>
```
7. Remove the deployed directories, *BASE\_DIR/pt/es2.3.2* and *BASE\_DIR/pt/es\_jre1.8.0\_yy* directories.

## Task A-2: Using the Supplemental Elasticsearch DPK Script on a Microsoft Windows Host

---

This section discusses:

- Using the *psft-dpk-puppet-setup.ps1* Script on Microsoft Windows
- Verifying the Elasticsearch Installation on Microsoft Windows
- Performing Post-Installation Steps on Microsoft Windows
- Removing the Elasticsearch Installation from Microsoft Windows
- Troubleshooting the Elasticsearch Removal from Microsoft Windows

### Task A-2-1: Using the *psft-dpk-puppet-setup.ps1* Script on Microsoft Windows

The Elasticsearch DPK deployment creates an Elasticsearch cluster with a single Elasticsearch node. Briefly, an Elasticsearch node refers to the server where Elasticsearch is installed, and the cluster is comprised of nodes which all have the same cluster name. The DPK setup script asks for the cluster name and the names of existing nodes. If you provide an existing cluster name and list of existing nodes, the existing nodes will join the cluster. For information on adding additional nodes after installation, see the section *Adding Additional Elasticsearch Nodes*.

See "Performing Additional Tasks," *Adding Additional Elasticsearch Nodes*.

For information on Elasticsearch concepts mentioned in this task, such as clusters and nodes, see the PeopleTools product documentation and the Elasticsearch online help.

See *PeopleTools 8.55: Search Technology*, PeopleTools Elasticsearch Home Page (select the tab Elasticsearch on PeopleTools 8.55), My Oracle Support, Doc ID 2205540.2.

See Elasticsearch online help, <https://www.elastic.co/guide/en/elasticsearch/guide/current/index.html>.

Use this procedure on physical or virtual Microsoft Windows hosts. This procedure assumes that:

- You have downloaded the required Elasticsearch DPK for Microsoft Windows, and saved it in a newly created directory accessible to the Microsoft Windows host, referred to as *ES\_INSTALL*.
- There is enough space on the host for the Elasticsearch installation.
- The user running the script *must have administrative permission*.

Make a note of the values you supply for ports, passwords, and so on. When you configure the Elasticsearch instance for PeopleSoft, the values must match those specified here.

1. Go to *ES\_INSTALL*.

2. Extract the first zip file (for example, `ELASTICSEARCH-DPK-WIN-2.3.2_xx.zip` or `V123456-01.zip`) in the same directory, `ES_INSTALL`.

---

**Note.** It is a good idea to extract into the same directory where you downloaded the zip file, and to extract into an empty directory for each new installation.

---

The extraction creates the following directories in `ES_INSTALL`:

- `setup` directory — includes the setup scripts
  - `puppet` directory — includes the open-source Puppet software required for the deployment
  - `archives` directory — includes archives for deployment
  - `readme.txt` file
  - `elasticsearch-manifest` file — includes the version information about Elasticsearch and JRE provided in the DPK.
3. Open a Windows PowerShell window; for example:
    - a. Select Start, and navigate to Windows PowerShell.
    - b. Right-click and select Run as Administrator.
  4. Change directory to `ES_INSTALL/setup`.
  5. Run the DPK setup script as follows:

---

**Note.** Use a single dash when specifying the script options; for example, `-env_type`.

---

```
./psft-dpk-puppet-setup.ps1 -env_type es
```

The script assumes that the downloaded DPK is in the parent directory of the setup script. If the DPK is located in a different directory, you can use this command, where the `-dpk_src_dir` option specifies the full path of the downloaded DPK:

```
./psft-dpk-puppet-setup.ps1 -dpk_src_dir <full_path_dpk_src> -env_type=>
es
```

6. Specify whether to install the Puppet software if necessary at the next prompt.

The script verifies if Puppet software is installed on the host. If not, answer `y` (yes) to install the Puppet software and `n` to abort the setup process. The default action (if nothing is entered at the prompt) is to install the software.

If there is any error during the Puppet software installation, the script aborts the setup process. Review the log file in `ES_INSTALL/setup`.

```
Starting the PeopleSoft Environment Setup Process:
Verifying if Puppet Software is Installed on the Host:
```

```
Puppet Software is not installed on the Host. If this Host is
used to setup a PeopleSoft environment, Puppet Software should
be Installed.
```

```
Do you want to Install Puppet Software on this Host? [Y|n]: y
```

```
Installing Puppet Software on the Host: [ OK ]
```

The script verifies if the DPK is available in `ES_INSTALL`, and aborts with the message `[FAILED]` if it is not.

Preparing the Windows Host for ES Environment:

Checking if ES DPKs are Present in the Folder: [ OK ]

- At the following prompt, enter a location that is accessible to the host to be used as the PeopleSoft base directory.

The base directory, referred to as *BASE\_DIR* in this documentation, is used to extract the DPK as well as for deploying Elasticsearch components. The directory C:\esdpk is used in this example:

The base folder is used to extract the ES DPKs.

This folder should be accessible

on the host, has write permission, and has enough free space.

Please Enter the ES Base Folder [C:\psft]: **C:\esdpk**

Are you happy with your answer? [Y|n|q]: **y**

The script validates if there is enough free space available under the specified base directory for the Elasticsearch environment. The Elasticsearch setup is aborted if there is not enough free space.

See Prerequisites.

Checking if Folder C:\esdpk has Enough Space: [ OK ]

- Review the status messages as the script validates the files found in the base folder.

Validating the ES DPKs in the Folder:

Validating the ES Server [ OK ]

Extracting the DPK Archives in the Host:

Extracting the ES DPK Archives: [ OK ]

- Enter the password two times for the Elasticsearch administrative user esadmin, at the following prompt.

The esadmin user is used to authenticate requests on Elasticsearch. The prompt includes the requirements for the password.

Enter a password for Elasticsearch admin user [esadmin]. Please ensure that the password has at least 9 characters with at least one upper case and one number: **\*\*\*\*\***

Re-Enter a Elasticsearch admin user password: **\*\*\*\*\***

- Enter the password for the Elasticsearch proxy user, people.

Note that this is not the same user as the PeopleSoft connect ID, which also has people as the default value. The prompt includes the requirements.

Enter a password for Elasticsearch proxy user [people]. Please ensure that the password has at least 9 characters with at least one upper case and one number: **\*\*\*\*\***

Re-Enter a Elasticsearch proxy user password: **\*\*\*\*\***

- Enter the name for the Elasticsearch cluster.

Enter cluster name:

- Enter the Elasticsearch HTTP port.

This is the port on which Elasticsearch listens for requests. The default is 9200.

Enter http port [9200]:

### 13. Enter the host name for any nodes that are already members of a cluster.

Enclose one or more host names in square brackets, with the host name or IP address in double quotes. For example, for one host, ["host1.example.com"]. Use commas to list two or more hosts; for example, ["host1.example.com", "127.0.0.1"].

Enter host name of nodes which are already member of a cluster ⇒  
[["127.0.0.1", "[::1]"]]:

### 14. Enter the heap size.

See Prerequisites

Enter heap size in GB which is less than 30 (Enter only numeric values):

### 15. Review the status messages as the script runs Puppet profiles to set up the Elasticsearch environment.

```
Setting up Puppet on the Host:
Copying PeopleSoft Puppet Modules:           [ OK ]
Updating the Puppet Hiera YAML Files:         [ OK ]
Updating the Role in Puppet Site File for the Host: [ OK ]

Setting up System Settings:                   [ OK ]
Deploying Elasticsearch Application Components: [ OK ]
Setting up Elasticsearch Server:              [ OK ]
```

A successful deployment includes the following:

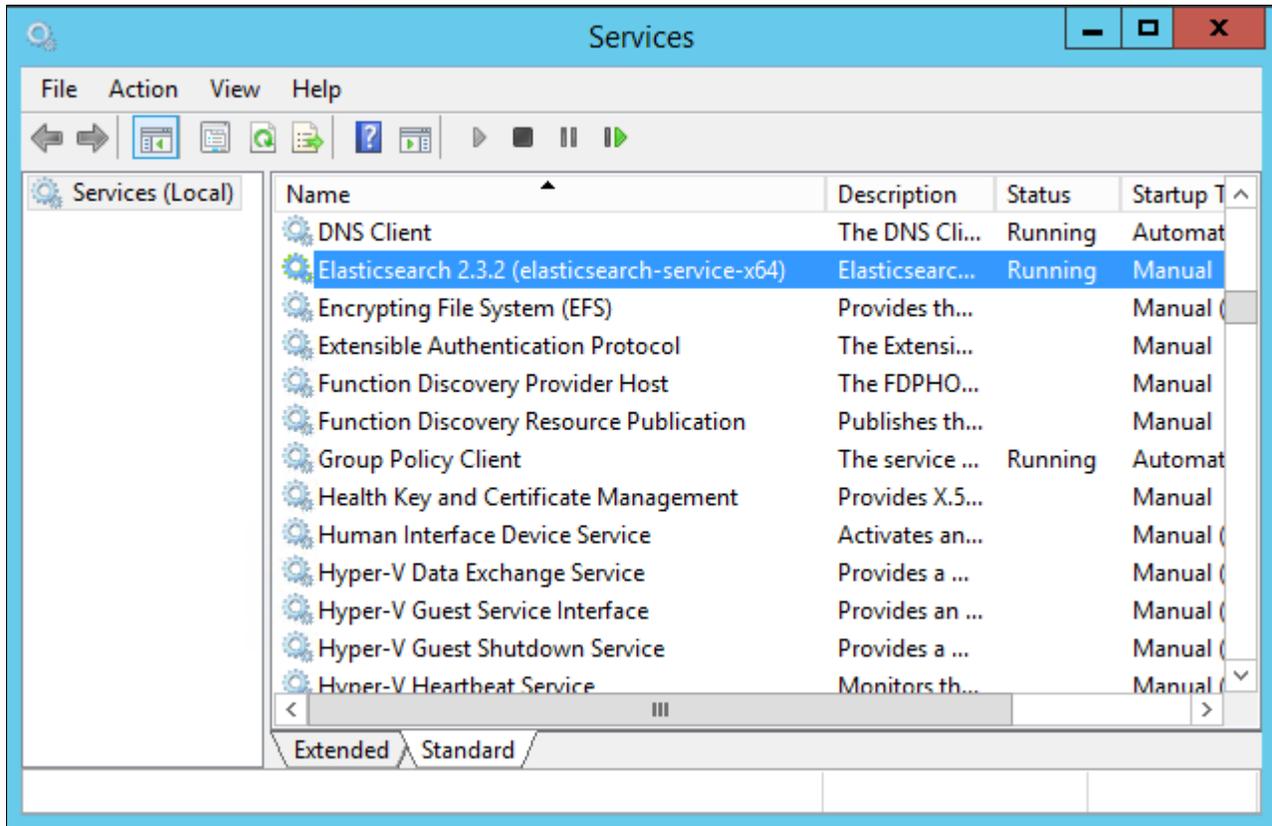
- The complete setup log is written to the file `psft-dpk-puppet-setup.log` in the `ES_INSTALL/setup` directory.
- The Elasticsearch home directory is found in `BASE_DIR/pt/es2.3.2`.
- The `ES_HOME` environment variable is set to `BASE_DIR/pt/es2.3.2`.
- Java is installed to `BASE_DIR/pt/es_jre1.8.0_yy`, where `yy` is the JRE version.
- The `JAVA_HOME` environment variable is set to `BASE_DIR/pt/es_jre1.8.0_yy`.
- The `ES_HEAP_SIZE` environment variable is set to the value you enter when running the setup script.

## Task A-2-2: Verifying the Elasticsearch Installation on Microsoft Windows

The Elasticsearch deployment sets up a Windows service. To verify the installation:

1. Launch the Services dialog box, for example by opening Task Manager and selecting the Services tab.

2. Verify that the "elasticsearch-service-x64" service is present and has status "Running," as in this example:



Services dialog box with Elasticsearch 2.3.2 service

3. If the Elasticsearch service is not listed, you can start it manually:
  - a. Open a command prompt with Run as Administrator.
  - b. Go to `ES_HOME\bin` and enter the following command:
 

```
service.bat install
```
  - c. Start the service with the following command:
 

```
service.bat start
```

After verifying the service, use one of the following methods to verify the Elasticsearch installation.

- Run a REST call.

This example uses the CURL utility to run the REST call:

```
curl --user <username>:<password> -XGET http://<host>:<port>
```

- Open a browser and enter the following URL:

```
http://<username>:<password>@<host>:<port>/
```

For both the REST command and the browser URL, use these definitions:

- username — the Elasticsearch user administrator, `esadmin`
- password — the password you entered during the DPK setup script installation
- host — the Elasticsearch host name.

- `port` — Elasticsearch (REST) port that you entered during the DPK setup script installation

In both cases, you should see a message similar to the following:

```
{
  "name" : "abc.abc.com",
  "cluster_name" : "ESCLUSTER",
  "version" : {
    "number" : "2.3.2",
    "build_hash" : "b9e4a6acad4008027e4038f6abed7f7dba346f94",
    "build_timestamp" : "2016-04-21T16:03:47Z",
    "build_snapshot" : false,
    "lucene_version" : "5.5.0"
  },
  "tagline" : "You Know, for Search"
}
```

### Task A-2-3: Performing Post-Installation Steps on Microsoft Windows

After you complete the Elasticsearch DPK installation, if you want to perform operations described later in this chapter, such as starting and stopping Elasticsearch, or running the `elasticsearchuser` script, perform the manual steps described in this section.

Verify whether the environment variables `ES_HEAP_SIZE` and `JAVA_HOME` were set by the installation process. If not, set them as follows:

- Set `ES_HEAP_SIZE` to a value equal to or less than 50% of available memory, and not exceeding 30G. For example:

```
set ES_HEAP_SIZE=6G
```

- Set `JAVA_HOME` to the location installed by the DPK setup script; for example:

```
set JAVA_HOME=BASE_DIR\pt\es_jre1.8.0_yy
```

### Task A-2-4: Removing the Elasticsearch Installation from Microsoft Windows

To remove the Elasticsearch installation from Microsoft Windows:

1. Open a Windows PowerShell window; for example:
  - a. Select Start, and navigate to Windows PowerShell.
  - b. Right-click and select Run as Administrator.
2. Go to `ES_INSTALL\setup` and run the following command:

```
.\psft-dpk-puppet-setup.ps1 -env_type es -cleanup
```

To specify the full path of the downloaded DPK, you can use the `-dpk_src_dir` option:

```
.\psft-dpk-puppet-setup.ps1 -dpk_src_dir <full_path_dpk_src> -env_type=>
es -cleanup
```

3. Review the cleanup log file in `ES_INSTALL\setup`.
4. Open the Services dialog box, for example by opening Task Manager and selecting the Services tab.

5. Verify that the Elasticsearch service, `elasticsearch-service-x64`, is not present.

## Task A-2-5: Troubleshooting the Elasticsearch Removal from Microsoft Windows

This section includes advanced steps to be used only if the previous procedures in this section failed. If the cleanup process on Microsoft Windows was not totally successful, the `BASE_DIR` folders may not be entirely cleared, or you may have trouble when carrying out another deployment. To remove the installation manually:

1. Run the cleanup command as described in the previous section.
2. If the script displays a `FAILED` message, run it again.
3. If it succeeds, check the `BASE_DIR` folders to be sure everything has been deleted.
4. If the `BASE_DIR` folders are not clear, or if a subsequent deployment is not successful, carry out the next steps.
5. Stop and remove the Elasticsearch service by entering the following commands in a command prompt, where `ES_HOME` is the Elasticsearch installation directory, such as `BASE_DIR\pt\es2.3.2`:

```
ES_HOME\bin\service.bat stop
ES_HOME\bin\service.bat remove
```

6. Remove everything under the `BASE_DIR` folder.

After you complete the Elasticsearch installation, you must configure the integration with the PeopleSoft environment.

## Task A-3: Using Customizations with the Elasticsearch Installation

---

The default initialization is intended to get an initial environment up and running before you start making customizations to your environment. The default setup is comprised of JRE installation, JRE configuration, Elasticsearch installation and Elasticsearch configuration. However, it is assumed that you will need to bypass the default initialization to customize to reflect your organizational standards.

These customizations might include:

- Changing default file system locations for logs, configuration, and so on
- Configuring the automounter
- Changing the runtime characteristic of the Elasticsearch server
- Specifying the Java heap size when deploying on Linux.

In order to do any customizations, answer `n` to the default initialization question when running the DPK setup script. After that, create or edit a `psft_customizations.yaml` file with the modified values and run the `Puppet apply` command to set up the environment. It is a good idea to copy the entire section that you want to modify from a delivered YAML file into the `psft_customizations.yaml` file and edit it. After installation, many of the parameters associated with the Elasticsearch DPK installation can be found in `psft_es.yaml`, which is installed in these locations:

- On Microsoft Windows in `C:\ProgramData\PuppetLabs\puppet\etc\data`
- On Linux in `/etc/Puppet/data`

Review the requirements for creating and using the `psft_customizations.yaml` file.

See *PeopleSoft PeopleTools Deployment Packages Installation*, PeopleSoft PeopleTools Patches Home Page, My Oracle Support, Doc ID 2062712.2.