ORACLE
PeopleSoft

PeopleSoft Financials/Supply Chain Management 9.2 (through Update Image 29) Installation

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PeopleSoft Financials/Supply Chain Management 9.2 (through Update Image 29)
Installation

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About This Documentation

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Understanding This Documentation

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

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

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

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

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

Audience

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

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

- SQL and SQL command syntax.
- PeopleSoft system navigation.
- PeopleSoft windows, menus, and pages, and how to modify them.
- Microsoft Windows.

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

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

Typographical Conventions

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

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

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

Products

This documentation may refer to these products and product families:

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

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

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

Related Information

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

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

To access documentation on My Oracle Support, go to https://support.oracle.com.

To access PeopleSoft Online Help (PeopleBooks),go to the Oracle PeopleSoft Online Help site:

http://docs.oracle.com/cd/E17566_01/epm91pbr0/eng/psbooks/psft_homepage.htm.

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

Comments and Suggestions

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

PSOFT-Infodev_US@oracle.com

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

Chapter 1

Preparing for Installation

This chapter discusses:

- Understanding the Installation
- Installing PeopleSoft PeopleTools and PeopleSoft Application Software
- Reviewing the Demo Database Size
- Using the Fluid User Interface

Understanding the Installation

This documentation includes pre-installation requirements, installation notes, and installation and configuration instructions specific to PeopleSoft Financials/Supply Chain Management (FSCM) 9.2 applications. This documentation is organized into sections by PeopleSoft application products. This chapter includes prerequisite information for the PeopleSoft FSCM 9.2 installation.

Task 1-1: Installing PeopleSoft PeopleTools and PeopleSoft Application Software

PeopleSoft applications built on PeopleTools 8.56 are delivered as deployment packages (DPKs), which include the installation files for both the PeopleSoft 9.2 application and PeopleSoft PeopleTools 8.56.

For information on obtaining and installing PeopleSoft applications,

See PeopleSoft 9.2 Application Installation for your database platform and for the current PeopleSoft PeopleTools release.

Install PeopleSoft PeopleTools as described in the "PeopleSoft PeopleTools 8.56 Installation Guide" for your database platform.

See PeopleSoft PeopleTools Installation Guide, for your database platform, on My Oracle Support.

Note that the DPK setup supports only installations in which the PS_APP_HOME location, which contains the PeopleSoft application software, is not the same as the PS_HOME location, which contains the PeopleTools software.

See PeopleSoft Update Manager (PUM) Home Page, My Oracle Support, Doc ID 1641843.2.

See Oracle's PeopleSoft PeopleTools 8.56 Home Page, My Oracle Support, Doc ID 2259140.2.

Note. Use of authentication domain in web profile is needed for Single Sign-On implementation.

Task 1-2: Reviewing the Demo Database Size

The following table lists the approximate PeopleSoft FSCM 9.2 Demo database size for each RDBMS platform.

Platform	Approximate Database Size
Oracle — Unicode/ANSI	19 GB
DB2 LUW — ANSI	58 GB
DB2 LUW — Unicode	88 GB
DB2 z/OS — ANSI	41 GB
DB2 z/OS — Unicode	47 GB
Microsoft SQL Server — ANSI	8.55 GB
Microsoft SQL Server — Unicode	11.5 GB

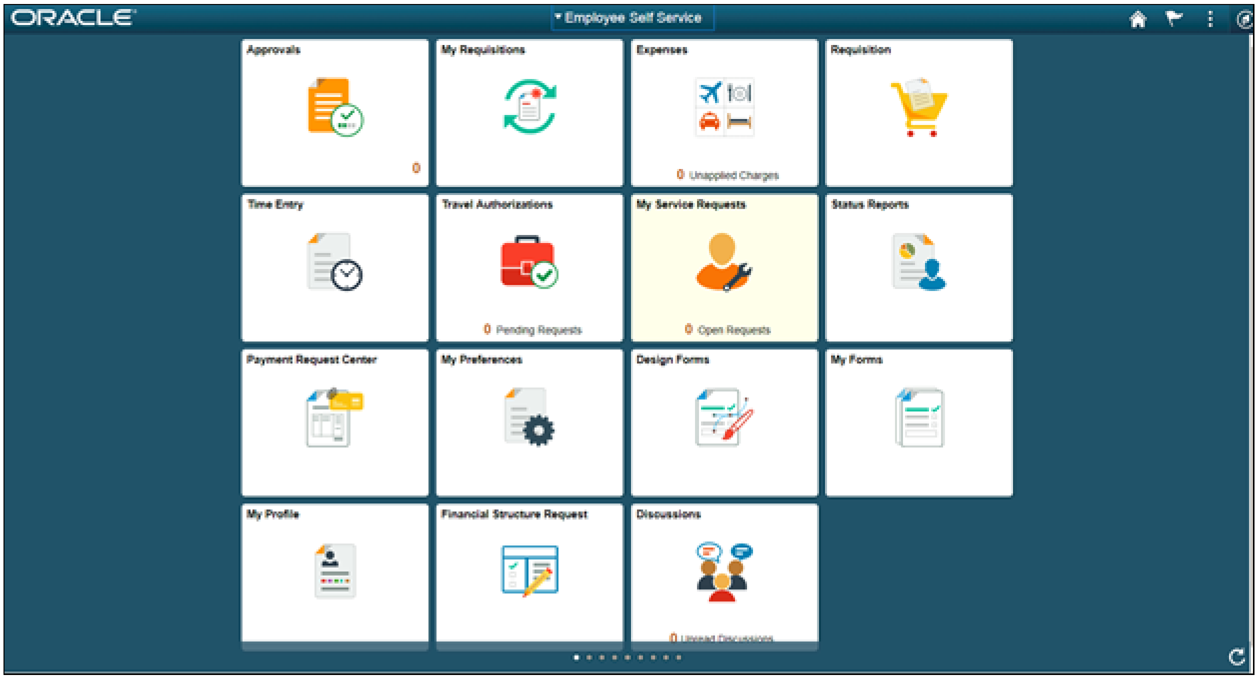
Oracle recommends that you increase the Database Size Heap for the DB2 LUW platform only to a minimum of 20,000 to avoid any temporary table failure during Demo database creation.

Note. For the sake of brevity, this documentation sometimes refers to DB2 for z/OS as DB2 z/OS, and it sometimes refers to DB2 for Linux, UNIX, and Microsoft Windows as DB2 LUW.

Task 1-3: Using the Fluid User Interface

When you sign in to your PeopleSoft application, you may see the PeopleSoft Fluid User Interface by default. To access the menu items, as seen in the classic user interface, from the PeopleSoft Fluid User Interface:

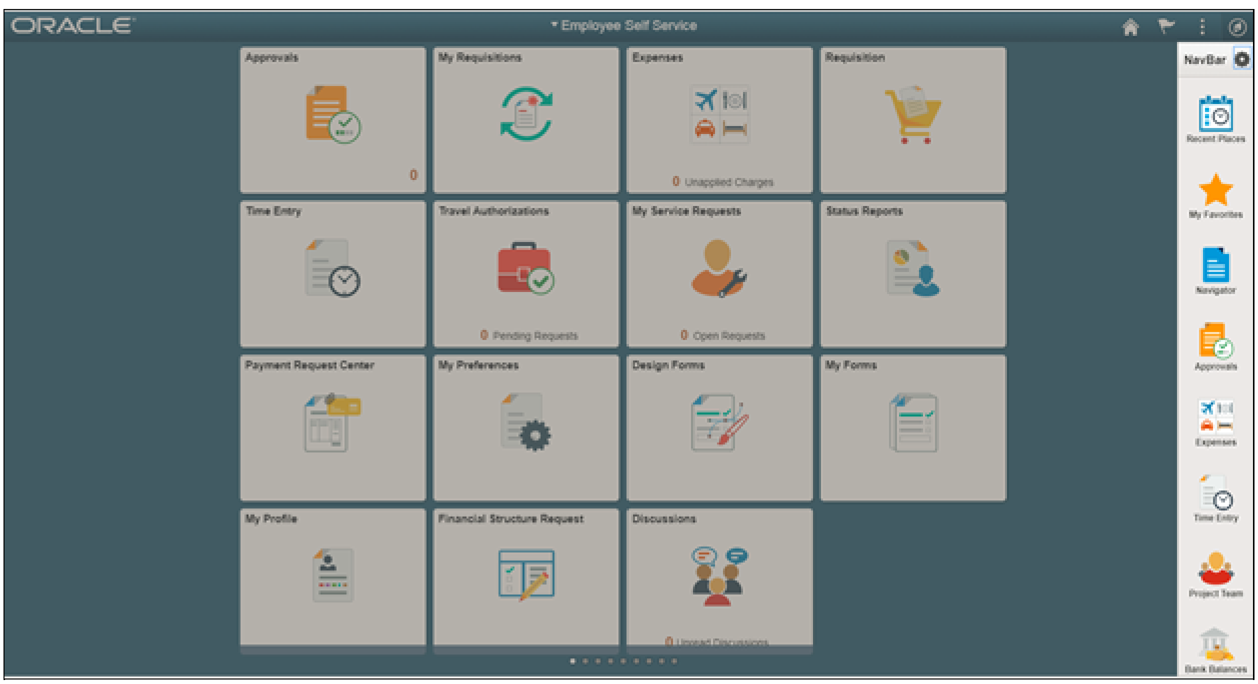
1. On the PeopleSoft Fluid User Interface, shown in this example, select (press) the NavBar button at the top right, which looks like a compass.



PeopleSoft Fluid User Interface home page

The Navigation bar (NavBar) side page appears.

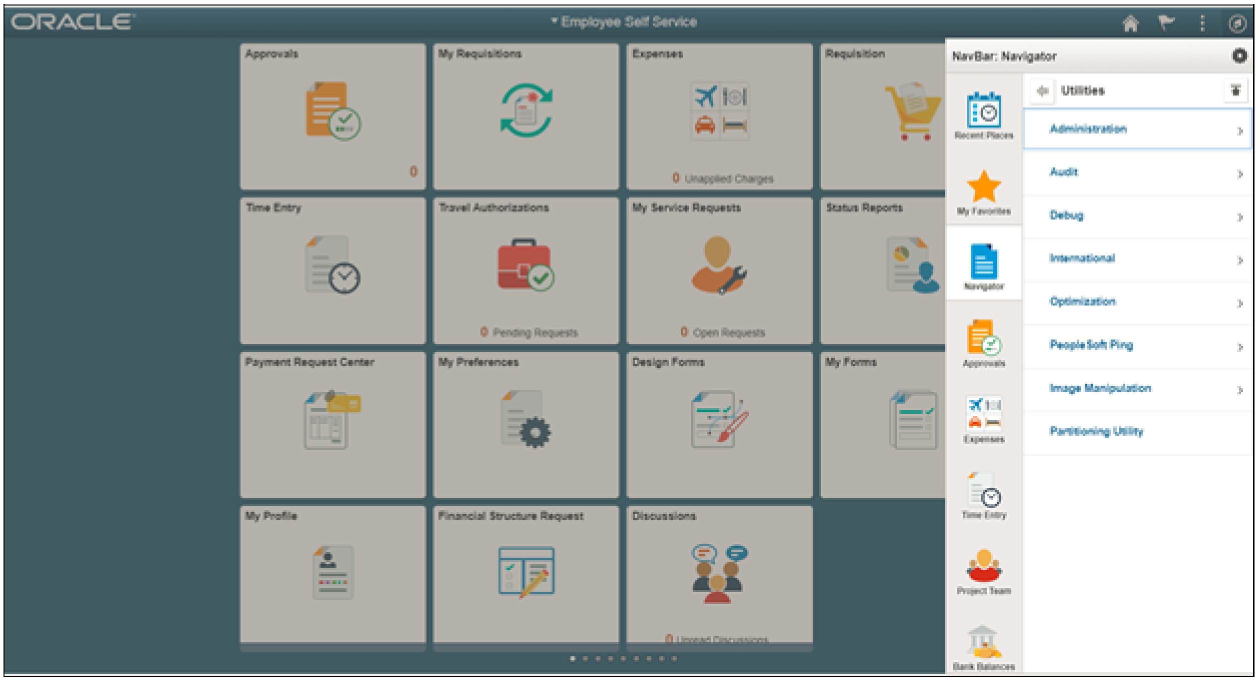
2. Select (press) Navigator.



Navigator side page with PeopleSoft menu items

The menu structure appears.

3. Navigate to the desired item, such as Set Up FSCM or PeopleTools.



Navigator side page with PeopleSoft menu items

See Also

PeopleTools: Applications User's Guide, "Working With Fluid Homepages"

PeopleTools: Fluid User Interface Developer's Guide

Chapter 2

Setting Up the PeopleSoft Financials/Supply Chain Management Database

This chapter discusses:

- Setting Up Installation Defaults for the System Database
- Deleting Summary Trees for the System Database
- Reviewing DB2 z/OS Requirements
- Setting Up the Database for the Chartfield Configuration Process
- Accessing FSCM Applications from PeopleSoft Portal Solutions

Task 2-1: Setting Up Installation Defaults for the System Database

Run the following script against the System (SYS) database only for PeopleSoft FSCM:

```
EPINSSYS.DMS -- Installation Defaults
```

This script establishes the installation defaults for the database. This only runs against the System (SYS) database.

Task 2-2: Deleting Summary Trees for the System Database

Run the following script only against the System (SYS) database for PeopleSoft FSCM:

```
EPCLNTRE.DMS -- Tree Definitions
```

This script deletes all of the summary trees from the database. This only runs against the System (SYS) database.

Task 2-3: Reviewing DB2 z/OS Requirements

This section discusses:

- Reviewing the EDM Pool Size
- Reviewing the Server Transfer Program Log

Task 2-3-1: Reviewing the EDM Pool Size

The PeopleSoft installation procedure places all tables for the product that you are installing into multiple, physical DB2 z/OS databases using a shared table space methodology. Depending on the applications that you are installing, the DB2 subsystem could have a minimum EDM Pool Size of 10–30 MB.

Task 2-3-2: Reviewing the Server Transfer Program Log

As a DB2 z/OS customer, you may see the following error message in the log file PSXFR.LOG that is generated when you run the PeopleSoft Server Transfer program:

```
501 Invalid data set name <name>. Use MVS Dsname conventions
```

Note. For details on PeopleSoft Server Transfer program, review the chapter "Setting Up the Batch Environment on z/OS" in PeopleTools Installation for DB2 for zOS for the current PeopleTools release found in My Oracle Support.

Ignore this error for the following files because they are not used in a DB2 z/OS environment:

- 853AUDRT.SQR
- 854AUDRT.SQR
- 853INDRT.SQC
- 853TBLRT.SQC
- 853TRGRT.SQC
- 854INDRT.SQC
- 854TBLRT.SQC
- 854TRGRT.SQC

Task 2-4: Setting Up the Database for the Chartfield Configuration Process

This section discusses:

- Understanding Database Requirements for the ChartField Configuration Process
- Defining Settings for the ChartField Configuration Process

Understanding Database Requirements for the ChartField Configuration Process

Due to the large number of updates performed by the ChartField Configuration Application Engine program (FS_CFCONFIG), you may encounter certain database errors when running the program. This is particularly true if you are adding or deleting ChartFields in your configuration. To address this, Oracle recommends that you use the database settings given in the following section as a starting point; however, you may need to adjust these upward if you encounter errors while running the utility.

Task 2-4-1: Defining Settings for the ChartField Configuration Process

DB2 LUW

- Update the locking mode to share:

  ```
  db2set DB2_RR_TO_RS=yes
  ```

  Note. This parameter is depreciated from DB2 LUW version 10.1 onwards.

- Include the following command in the DBMCFG.SQL configuration file:

  ```
  UPDATE DBM CFG USING QUERY_HEAP_SZ  64000
  ```

- Log file size (4KB): (LOGFILSIZ) = 24000
- Number of primary log files: (LOGPRIMARY) = 20
- Use the following minimum Tablespace sizes (you may need to increase these sizes):
  - BDAPP — 9720
  - BDAPPIDX — 2680
  - BDLARGE — 1191
  - FAAPP — 11312
  - FSLARGEIDX — 13568
  - LCAPP — 28572
  - LCAPPIDX — 2600
- Recycle the instance after changing the settings.

DB2 z/OS

Oracle recommends no changes.

Microsoft SQL Server

Oracle recommends no changes.

Oracle

- Rollback or UNDO Tablespace = 1536MB
- Rollback Segment sizing: Initial Extent + (Next Extent * Maxextents) = 1024 MB (approximate)
- dml_locks = 1024 (set in init.ora)

  Changing the dml_locks setting requires that you recycle the instance.

Task 2-5: Accessing FSCM Applications from PeopleSoft Portal Solutions

Only perform this task if you use the PeopleSoft Portal Solutions product and want to access your PeopleSoft Financials, ESA, or SCM application from within the PeopleSoft Portal Solutions database.

The installation phase of your PeopleSoft application should only entail setting up a single link to the PeopleSoft application content provider. To set up the single link and the single sign on, see the following sections of the PeopleSoft Portal Solutions installation documentation:

- "Installing PeopleSoft Single Sign-On"
- "Accessing PeopleSoft Content Providers"
- "Installing Services Procurement Navigation"
- "Creating Content Provider Navigation Collections (Recommended)" discusses additional product-specific steps you may need to perform for fully functional navigation within the PeopleSoft Portal Solutions database.

See PeopleSoft Portal Solutions Installation for the current PeopleTools release in My Oracle Support.

Chapter 3

Configuring Application SQRs and COBOL for the DB2 z/OS Server

This chapter discusses:

- Understanding SQR and COBOL Processing on the DB2 z/OS Server
- Allocating Data Sets on the z/OS File System
- Modifying the JCL Shells

Understanding SQR and COBOL Processing on the DB2 z/OS Server

This section applies if you are running PeopleSoft FSCM 9.2 on the DB2 z/OS database platform and want to run SQR and COBOL processes on the z/OS server that require reading and writing of external files.

For both SQR and COBOL processing on the DB2 z/OS server, the process scheduler provides standard JCL templates to submit jobs in the z/OS server. These shells accommodate basic input and output files that are determined by the program engines themselves. However; for those SQR and COBOL processes that require special input or output files, additional modifications must be made to the JCL templates to accommodate these files.

PeopleSoft General Ledger and PeopleSoft Cash Management both contain several of these special files in certain SQR processes. To accommodate these files, data sets must be pre-allocated on the z/OS file system, as well as modifications made to the JCL shells.

Task 3-1: Allocating Data Sets on the z/OS File System

Sequential or partitioned data sets can be used in COBOL and SQR processing. The DISP parameter in the JCL is critical to the successful execution of a JCL job submission and very sensitive to the data set disposition at the initiation of the job. For this reason, Oracle strongly recommends the use of a partitioned data set, rather than sequential data sets—particularly for output files—and for input files, when the existence of the actual file drives the processing path that the program takes.

All like processes share the same JCL Shells. An invalid file disposition in the process can prevent that process and all the processes from executing successfully. For this reason Oracle recommends using DISP=SHR in the JCL Shells, as discussed later in this document. DISP=SHR presumes that the data set exists at the time a job execution is initiated. If the data set does not exist, a JCL error occurs. The PDS requires only the root data set, for it the individual member does not need to exist. If the member does not exist, it is automatically created by the z/OS file management system.

You should allocate partitioned data sets that include the following attributes:

- The `record` format should be variable block (RECFM=VB).
- The record length should be slightly wider than the record length of the file, which is defined within the SQR itself.

  Refer to the table below for SQR LRECL definitions.
- The data set name type should be PDS (DSORG=PO).

The following is an example of a JCL statement to allocate a PDS:

```
//*
//PDSALL   DD DSN=PSHLQ.PPVVV.SQRFILES,
//            DISP=(,CATLG,DELETE),
//            DCB=(DSORG=PO,RECFM=VB,LRECL=500),
//            VOL=SER=,
//            SPACE=(TRK,(200,95,75),RLSE),
//            UNIT=SYSDA
// *
```

The following table details the information that you can use to both pre-allocate the data set and modify the JCL Shells for PeopleSoft FMS in the next section, Modifying the JCL Shells.

PeopleSoft Product	SQR or COBOL Program Name	DD Card Name[1]	Data Set Type / Record Format / Record Length	Member Name or Random Name[2]
General Ledger	GLS7500	Defined and entered by the customer	PDS/VB/850	Specific Member name (OUTPUT FILE)
Treasury	ECIN0001	Defined and entered by the customer.	PDS/VB/500	Specific Member name (OUTPUT FILE)

[1] DD Card Name — File name passed from within the program; limited to 8 characters with no special characters.

[2] Random name uses a member name of A%INSTANCE%

The following tables detail the information that you can use to both pre-allocate the data set and modify the JCL Shells for PeopleSoft SCM products in the next section, Modifying the JCL Shells.

PeopleSoft Inventory:

SQR or COBOL Program Name	DD Card Name[1]	Data Set Type / Record Format / Record Length	Member Name or Random Name[2]
INS9050	INCOUNT	PDS/VB/250	Specific Member name (INPUT FILE)
INS9051	INCOUNT	PDS/VB/250	Specific or Random Member name (OUTPUT FILE)
INS9080	INFCST	PDS/VB/250	Specific or Random Member name (OUTPUT FILE)
INS9081	INFCST	PDS/VB/250	Specific Member name (INPUT FILE)

[1] DD Card Name — File name passed from within the program; limited to 8 characters with no special characters.

[2] Random name uses a member name of A%INSTANCE%

PeopleSoft Manufacturing:

SQR or COBOL Program Name	DD Card Name [1]	Data Set Type / Record Format / Record Length	Member Name or Random Name [2]
SFS1100	SELPID	PDS/FB/183	Specific Member name (OUTPUT FILE)
SFS1600	SELPID	PDS/FB/183	Specific Member name (OUTPUT FILE)

[1] DD Card Name — File name passed from within the program; limited to 8 characters with no special characters.

[2] Random name uses a member name of A%INSTANCE%

Task 3-2: Modifying the JCL Shells

The PeopleSoft release delivers three shells. One for COBOL, SHELCBL.JCT, and two for SQRs, SHELSQRF.JCT and SHELSQRP.JCT. The shells are located in the *<PS_HOME>*/appserv/prcs/shelljcl directory in UNIX System Services.

For each file and each program to be run with that JCL shell, the shell itself must be modified with the appropriate DD statement name and corresponding data set name. For example, if there are six SQRs that reference a total of 10 special input or output files, and these SQRs use the SHELSQRF.JCT JCLshell, then 10 DD statement cards must be added to the appropriate section of the SHELSQRF.JCT file.

The following is an example of the editing that is required in JCL shell SHELSQRF.JCL to accommodate special files that are referred to as INSQR1 and INSQR2 in the SQR programs (change shown in bold font):

```
//*CTRANS   DD DSN=&SQRHLQ..LINKLIB,DISP=SHR
//SQRDIR    DD DSN=&SQRHLQ..ERRDAT,DISP=SHR
//SI        DD DSN=&PSHLQ..SQRINC,DISP=SHR
//SYSTERM   DD SYSOUT=*
//SYSOUT    DD SYSOUT=*
//DBGLOG    DD SYSOUT=*
//SYSTMPDB DD UNIT=WORK,SPACE=(TRK,25)  VS1 ONLY
//SP        DD DSN=&PSHLQ..SQRSRC(&SQRID),DISP=SHR
//*  ADD DD STATEMENTS HERE FOR LIBRARY CONCATENATION
//*
//SYSTERM   DD SYSOUT=*
//*
%SQROUT%
//*
//SQRPOST   DD DSN=&SQRHLQ..DAT(POSTSCRI),DISP=SHR
//SYSERR    DD SYSOUT=*
//SYSTSIN   DD DSN=&PSHLQ..PARMLIB(NOPARMS),DISP=SHR
//SYSIN     DD DSN=&PSHLQ..PARMLIB(&PRMID),DISP=SHR
//SQRINI    DD DSN=&PSHLQ..SQRSRC(PSSQRINI),DISP=SHR
//INSQR1    DD DSN=&PSHLQ..INSQRPDS(A%INSTANCE%),DISP=SHR
//INSQR2    DD DSN=&PSHLQ..INSQRPDS(INFILE),DISP=SHR
//         PEND
//*
```

```
//%PRCSNAME% EXEC SQRPROC,SQRID=%PRCSNAME%
//SYSTSIN  DD *
DSN SYSTEM(%DB2SUB%)
RUN PROG(SQR)  -
PLAN(SQRPLAN) -
LIB('SYS5.SQR614B1.SQR.UNICODE.LOAD') -
%SQRFLAGS%
END
//*
//SYSIN  DD *
%SQRPARMS%
/*
```

If you have already configured a process scheduler, the shells that your configuration uses can be found in: <*PS_CFG_HOME*>/appserv/prcs/<*process scheduler name*>/shelljcl.

Note. You must stop and restart the process scheduler for the edits in the JCL shells to take effect.

Chapter 4

Configuring Global Search Using PeopleSoft Search Framework

This chapter discusses:

- Understanding Configuring Global Search Using PeopleSoft Search Framework
- Prerequisites
- Defining New Roles for Global Search
- Defining Search Group Display
- Verifying the Setup of Portal Node in PeopleSoft FSCM
- Identifying FSCM Search Definitions for Attachments
- Deploying and Indexing Delivered Search Definitions
- Upgrading File Attachments

Understanding Configuring Global Search Using PeopleSoft Search Framework

PeopleSoft Search Framework is a PeopleTools indexed search technology that relies on the use of a predefined search engine by way of PeopleSoft Integration Broker. It supports Elasticsearch as the Search Engine. PeopleSoft Integration Broker provides the interface between PeopleSoft Search Framework and Elasticsearch to deploy PeopleSoft Search, build the indexes, and return the search results.

Important! There are deployment and sizing considerations which should be determined prior to implementation of search. Review the document *Elasticsearch Homepage* (Document ID: 2205540.2) on My Oracle Support for more information. This page provides information concerning configuration of the Elasticsearch environment. See the PeopleSoft Search Framework information in the product documentation for PeopleTools: PeopleSoft Search Technology for your new release for details about configuring PeopleSoft Search.

See *PeopleSoft FSCM: Applications Fundamentals.*

Prerequisites

This section describes the required setup for Search Framework to enable the Global Search functionality within the Financial/Supply Chain Management product line.

Important! Elasticsearch configuration requires the installation of PeopleSoft PeopleTools 8.55.11 or higher. Ensure to use Elasticsearch DPK4 or higher.

Important! You should *only* perform these steps if you have completed the tasks discussed in the PeopleTools installation chapter, "Configuring Integration Between PeopleSoft PeopleTools and Search Framework," for your new release.

See the PeopleTools Installation guide for your database platform and current PeopleTools release, "Configuring Integration Between PeopleSoft PeopleTools and Search Framework."

See Also

PeopleTools: PeopleSoft Search Technology

Task 4-1: Defining New Roles for Global Search

Sample roles are provided for the Global Search and the Search Pages. You will need to determine which users will need access to these roles for searching. Your PeopleSoft administrator needs to complete the steps below to add roles.

To add the roles for search:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. On the User Profiles page, select the Roles tab.
3. In the grid, add the roles shown in the following table, appropriate to the user who can access the Global Search:

Global Search Category	ROLE	Permission List
Accounts Payable	Search Accounts Payable	EPSR1040
Asset Management	Search Asset Management	EPSR1030
Catalog Items	Search Catalog	EPSR1080
Expenses	Search Expenses	EPSR1050
General Ledger	Search General Ledger	EPSR1060
Procure to Pay	Search PtoP	EPSR1000
Purchasing/Procurement	Search Procurement	EPSR1020
Strategic Sourcing	Search Strategic Sourcing	EPSR1010
Supplier Information	Search Supplier Information	EPSR1080
Supplier Contracts Document	Search Authored Documents	EPSR1090

In addition there are several PeopleTools roles created for users who access the Search Definitions and are allowed to run and schedule the search indexes. These roles are:

- Search Server — required only for the user setup as the Callback user for the Search Instance

- Search Query Administrator — required to access Queries associated with all Search Definitions, this is required for the Callback user as well as for any user who will need to modify these queries.
- Search Administrator — required for any user who will be allowed to submit jobs for indexing.
- Search Developer — required for any user who will be granted access to the design of Search Definitions

See *PeopleTools: PeopleSoft Search Technology.*

Task 4-2: Defining Search Group Display

This section discusses:

- Understanding Search Group Display
- Adding the Search Group to the Home Page Search Context
- Enabling the Global Search Box in the Page Header

Task 4-2-1: Understanding Search Group Display

In order for the Search Group to display in the Global Search Header and drop-down list, you must add the Search Group to the Home Page Search Context and enable the global search box in the header.

Task 4-2-2: Adding the Search Group to the Home Page Search Context

To add the Search Group to the Home Page Search Context:

1. Select PeopleTools, Search Framework, Search Admin Activity Guide.

   In the Search Administration Activity guide, expand Administration section and select Define search context page.
2. On the Define Search Context search page, select *Home Page* from the Context Type drop-down list, and then click Search.

3. Add the Search Groups, as appropriate for your installation, and other values in the grid as needed.

   This table lists names, sequence order, and descriptions for the fields and values in the Define Search Context page, for example for the Home Page:

Default	Sequence	Search Category Name	Description
Y	1	EP_PROCURE_TO_PAY	Procure to Pay
N	2	EP_SOURCING	Strategic Sourcing
N	3	EP_PROCUREMENT	Purchasing/Procurement
N	4	EP_ASSETS	Asset Management
N	5	EP_PAYABLES	Accounts Payable
N	6	EP_EXPENSES	Expenses
N	7	EP_GENERAL_LEDGER	General Ledger
N	8	EP_VENDORS	Supplier Information
N	9	EP_CATALOG_ITEMS	Catalog Items
N	10	EP_CS_AUTHORED_DOC	Supplier Contract Documents
N	11	PTPORTALREGISTRY	Navigator
N	12	EOFD_FLUID_DISCUSSIONS	FSCM Discussions

4. Click Save.

Task 4-2-3: Enabling the Global Search Box in the Page Header

To enable the Global Search box in the page header, perform the following steps:

1. Select PeopleTools, Portal, General Settings.
2. Select the Display Global Search in Header check box.
3. Click Save.

Task 4-3: Verifying the Setup of Portal Node in PeopleSoft FSCM

To verify the Portal Node in the PeopleSoft FSCM environment:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the Portal node *PSFT_EP*.

   The Node Definitions page appears.
3. On the Node Definitions page, select the Portal tab.

4. On the Portal page, in the Content URI field, verify that you have entered an address that corresponds to your PeopleSoft FSCM environment.

   For example: *http://<server>:<port>/psc/pshome/*
5. In the Portal URI field, verify that you have entered an address that corresponds to your PeopleSoft FSCM environment.

   For example: *http://<server>:<port>/psp/pshome/*
6. Click Save.
7. Repeat steps 1 through 6 for the ERP Node.

See the product documentation for PeopleTools: PeopleSoft Integration Broker Administration for more information about Integration Broker setup.

Task 4-4: Identifying FSCM Search Definitions for Attachments

This step contains details on FSCM search definitions that can search for attachments.

Search Attachments are documents that can be included in a Search Index. Depending on the application and setup, attachments can be stored on the FTP server, the SFTP server, or in the database. When attachments are to be included in a search index, they must be defined on the Attachment Properties tab of the Search Definition page. You can also find pre-defined attachments on the Search Definition page.

See the product documentation for PeopleTools: PeopleSoft Search Technology for more information on search definitions and attachments.

This table illustrates the Financials and Supply Chain search definitions that can search for attachments, along with the locations where they are used:

Search Definition	**Description**	**Used In**
EP_AM_ASSET	Assets	Global / Search Pages
EP_AP_VENDOR	Suppliers	Global / Search Pages
EP_AP_VOUCHERS	Vouchers	Global / Search Pages
EP_CS_DOC_ADHOC	Adhoc Documents	Search Content in Supplier Contract Mgmt
EP_CS_DOC_CONTRACTS	Contract Documents	Search Content in Supplier Contract Mgmt
EP_CS_DOC_PURCHORDRS	Purchase Order Documents	Search Content in Supplier Contract Mgmt
EP_CS_DOC_SOURCING	Sourcing Event Documents	Search Content in Supplier Contract Mgmt
EP_PO_CONTRACTS	PO Contracts	Global / Search Pages
EP_PO_PURCHASE_ORDERS	Purchase Orders	Global / Search Pages

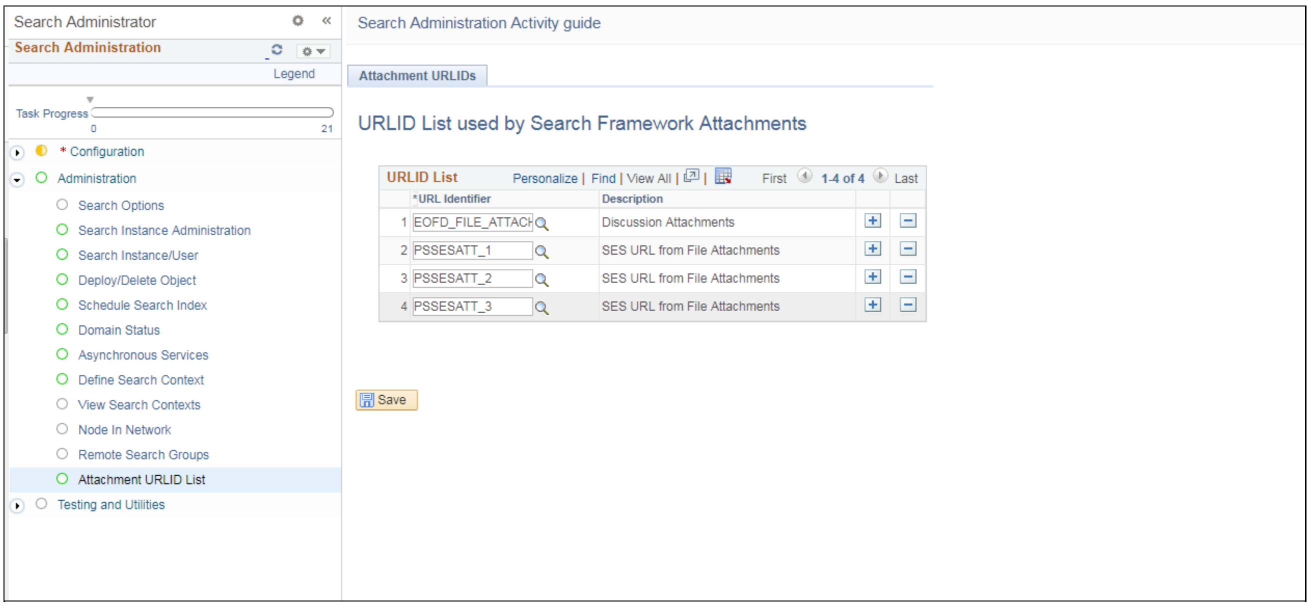
Search Definition	Description	Used In
EP_PO_REQUISITIONS	Requisitions	Global / Search Pages
EP_SS_EVENTS	Sourcing Events	Global / Search Pages

Before indexing, verify that the URLID list is not blank. Attachments will *not* be indexed if the URLID list is blank.

To verify:

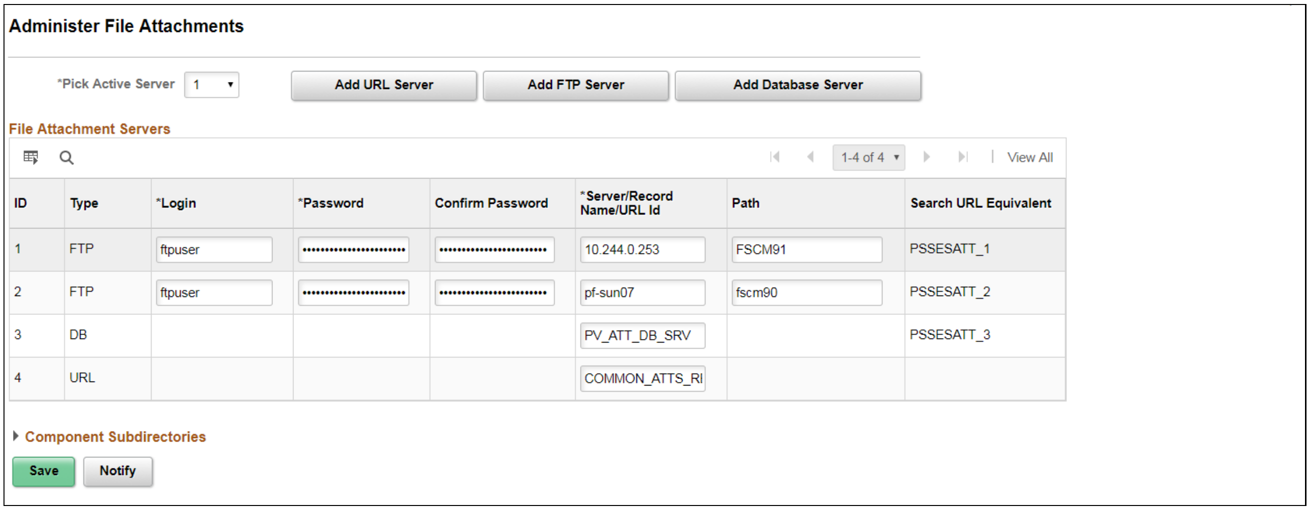
1. Select PeopleTools, Search Framework, Search Admin Activity Guide.

   On the Search Administration section, click Administration, and select the Attachment URLID List option to view the Attachments URLIDs page, as shown in the following example:

   Attachments URLIDs List page

2. Verify that the attachment URL IDs defined in the File Attachment Architecture (Search URL Equivalent column), as shown in the following example, appear on this list:



Verify Attachment URL IDs

If URL IDs are missing, add those.

See the task "Upgrading File Attachments" for instructions to add URL IDs and for information on File Attachment Architecture.

Note. The Attachments URLIDs list is used by the Search Framework to know which attachments will be available to Search Framework.

Task 4-5: Deploying and Indexing Delivered Search Definitions

This section discusses:

- Deploying Indexes
- Building an Index

Task 4-5-1: Deploying Indexes

After the indexes are defined, you need to deploy the search definition. You must also deploy the search categories that contain more than one index. Search categories with only one index, which have the same name as the search definitions, are automatically deployed.

Warning! The Deploy Search Definitions page also allows you to delete search definitions. Deleted search definitions are not reversible.

The process of deploying and building search definitions defined for Global Search also automatically enables the Keyword Search within Search Pages for the components associated on the Search Definition.

Note. If your environment does not contain licenses for all products within the Procure to Pay search category you will need to deploy the underlying indexes for the product. However, you do not need to build the indexes. As an alternative, you can customize the Procure to Pay Search Category to remove Search Definitions related to products that are not licensed.

To deploy a search definition:

1. Select PeopleTools, Search Framework, Search Admin Activity Guide.

   In the Search Administration Activity guide, expand the Deploy\Delete Object section to display the Deploy Search Definitions page.
2. Select the check box in the left column.
3. Scroll to the bottom of the Deploy Search Definitions page, and click the Deploy button.
4. Select the Search Categories tab.

   Confirm that the category with the same name as the search definition is automatically deployed.
5. Global Search Categories generally contain more than one search definition. As such, they must be deployed independently by following the same steps for a search definition except using the Search Categories tab to deploy. Deploying these search categories can occur before or after individual search definitions are indexed. For example, *EP_PROCURE_TO_PAY* is a Search Category that contains multiple search definitions.

   Important! It must be deployed from the Search Categories tab before it is available in the Global Search bar.

PeopleSoft delivers a sample user defined as a *callback user* called PSAPPS for use with Search Framework. A callback user is defined on the Search Framework Search Instance page. Before deploying Search Definitions, verify that the callback user assigned to the Search Instance has been assigned a minimum of the following three roles: Search Query Administrator, Search Server and Peoplesoft User.

Note. Different roles with equivalent permissions can also be used.

Failure to assign proper roles to the callback user will result in errors during search definition deploy and index build.

See *PeopleTools: PeopleSoft Search Technology,* "Administering Search Definitions and Search Categories."

Task 4-5-2: Building an Index

In this section you use the Schedule Search Index page to build an index.

To build an index:

1. Select PeopleTools, Search Framework, Search Admin Activity Guide.

   In the Search Administration Activity guide, expand the Schedule Search Index section to display the Schedule Search Index page.
2. Enter the Search Definition name in the Search Definition field.
3. Select Incremental or Full, type of Index Build.
4. Select Language depending on the database.
5. Click Run and enter a Process Scheduler.

See the product documentation for PeopleSoft FSCM: Applications Fundamentals for more information about the Build Search Index page.

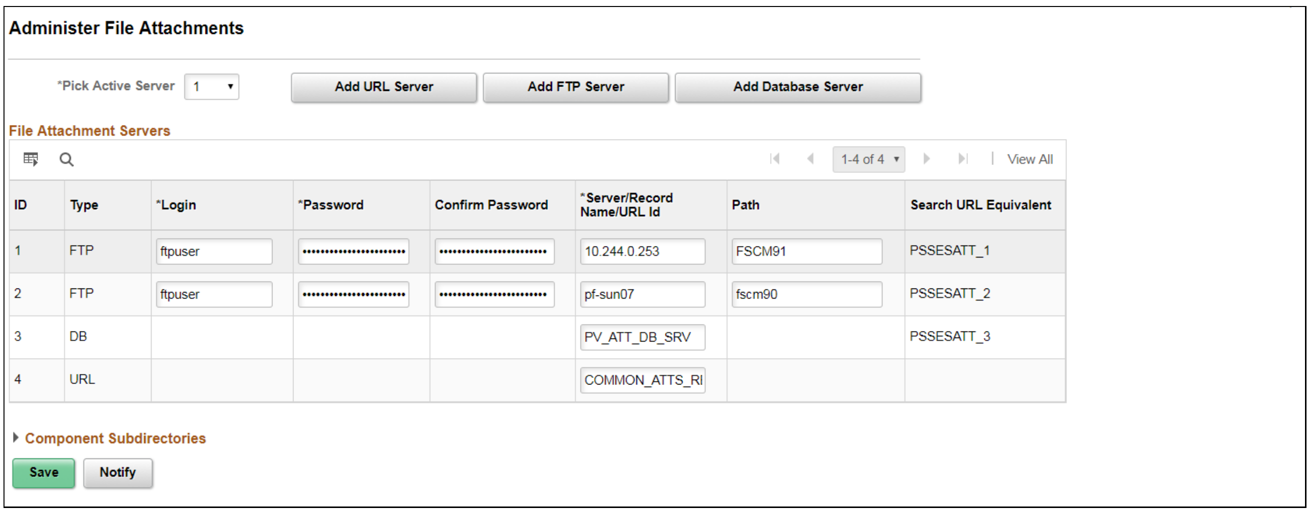
Task 4-6: Upgrading File Attachments

The file attachment architecture is enhanced to provide interfaces for existing legacy attachments for use in definition for PeopleTools Search Framework indexes. In order for attachments to work properly in Search Framework, the definitions for database and FTP or SFTP based file attachments are linked to a Tools URL definition. You can add links in the architecture to define what is required. You can follow the steps listed, to make the system ready for attachment processing in Search Indexes.

If your attachments are all stored within the database this procedure is not required. For any existing non-URL (FTP) based file attachment setup which is crawled, there is a URL definition created in the Search URL Equivalent column on the Administer File Attachment page. The corresponding URLs are automatically set up in PeopleSoft PeopleTools. You need to verify that the file attachments for FSCM are set up.

To set up special URLs for File Attachment Architecture:

1. Select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments. The Administer File Attachments page appears as shown in the following example:



Administer File Attachments page

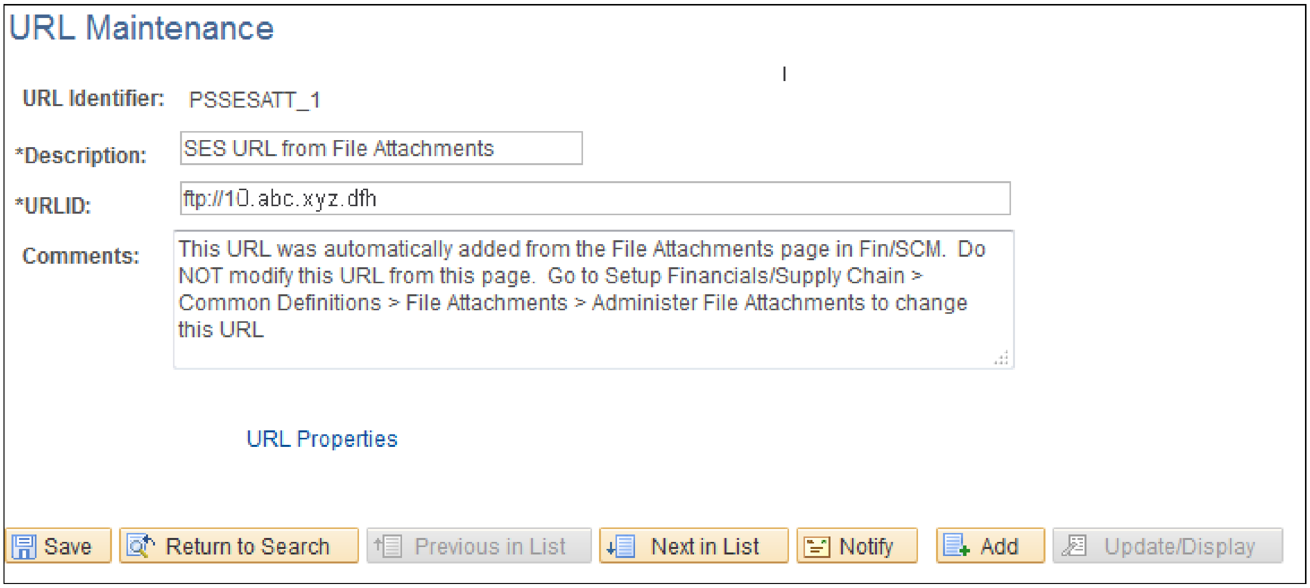
The page displays the definitions that you have created. Make some small change on the page, for example; change the active server or add a space to the end of the login name, and save it. If required, you can revert the change later.

Note. The Search URL Equivalent column is populated with the required URL values.

---

2. Select PeopleTools, Utilities, Administration, URLs, to create PeopleSoft URL definitions.

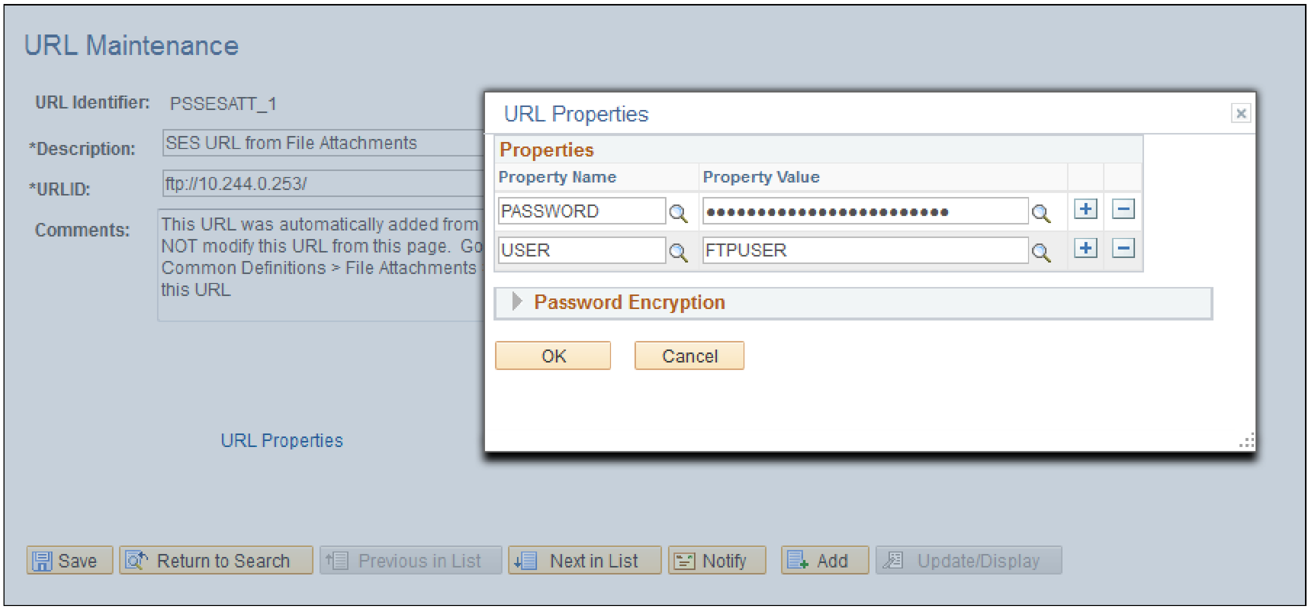
   Verify that in the PeopleSoft URL definitions page, the URLs are created automatically. The following example shows a URL definition page:



URL Maintenance page

These URLs are created with *PSSESATT_<number>* prefix. The *<number>* corresponds to the ROW number on the URLs listed in Administer File Attachments page.

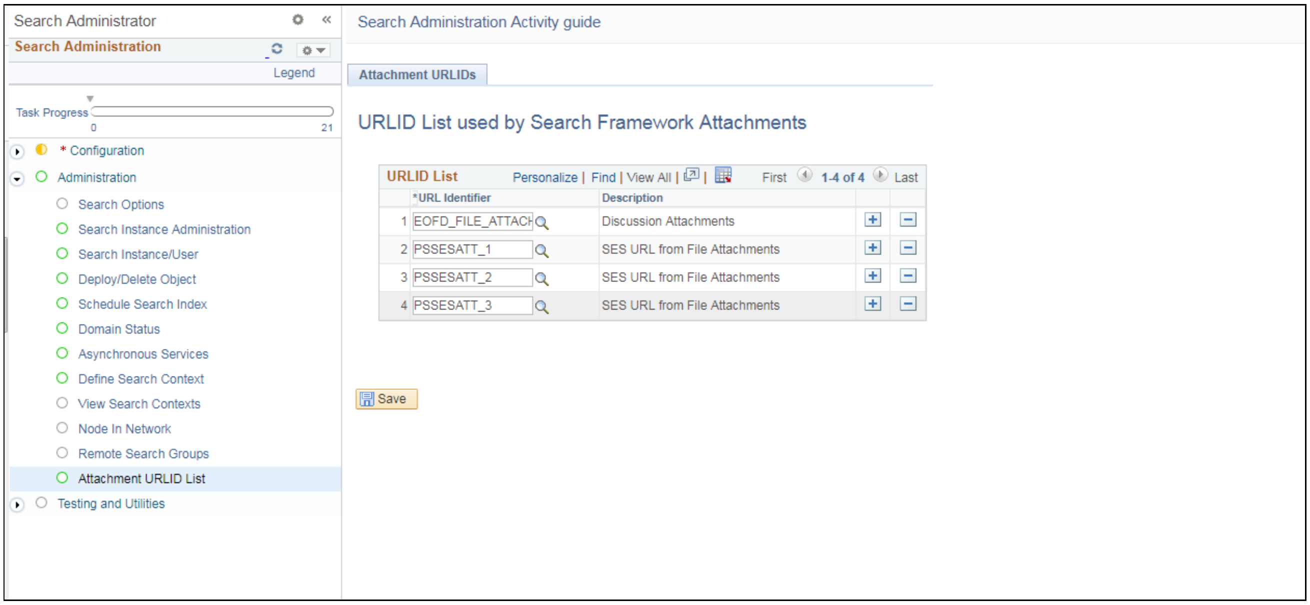
Verify the username and password are created under the URL Properties hyperlink and the URL path is correct. The following example shows URL Properties window:



URL Properties window

3. Select PeopleTools, Search Framework, Search Admin Activity Guide.

   On the Search Administration section, click Administration, and select the Attachment URLID List option to view the Attachments URLIDs page, as shown in the following example:



URLID List Used by Search Framework Attachments page

   Add the URLs created in step 2 to this list.

4. Click Save.

Note. You cannot delete a server after you save the row and quit the component. After you quit, the system assumes that attachments are stored on this server location.

See the product documentation for PeopleTools: Search Technology for more information about the Attachment URL ID list

---

Note. URLs for Search Framework are only created for servers that are *not* already defined as a URL type.

Chapter 5

Configuring Materialized Views for Operational Metrics

This chapter discusses:

- Understanding Materialized Views
- Enabling Materialized View
- Maintaining Materialized Views
- Analyzing the Tiles Used in Operation Metrics

Understanding Materialized Views

When building SQL views or query views on an Oracle database, you have the option of implementing a materialized view. In contrast to a standard view, which has only a logical existence, a materialized view has a physical existence, and therefore it can be indexed, analyzed, and managed like other database tables. A materialized view takes the results of complex SELECT statements and saves the datasets to disk. The results are then readily available without the need to run the SQL each time.

Using materialized views can provide significant improvements in performance. The SELECT statements that typically define materialized views often contain sizable tables, complex joins, and summary functions that may take significant time and computing resources to complete. By running the SQL once and saving the results to a table that can be used and reused, a significant savings of CPU and memory consumption can be achieved. Like other PeopleSoft record definitions, materialized views are defined using Application Designer. The data is refreshed on a time period defined in the materialized view record definition.

Conceptually similar indexed views and summary tables are present in Microsoft SQL platform and materialized query tables are available in DB2/zOS platform.

The table below lists the products using materialized views for the Operation Metrics feature:

Product	PI Image	Documentation
Accounts Payable	24	See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," PeopleSoft Source to Settle Common Information, Using Operation Metrics in Payables.

Product	PI Image	Documentation
Accounts Receivable	24	See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," PeopleSoft Source to Settle Common Information, Using Operation Metrics in Receivables.
Billing	24	See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," PeopleSoft Source to Settle Common Information, Using Operation Metrics in Billing.

Task 5-1: Enabling Materialized View

This section discusses:

- Change Properties
- Creating Materialized View in App Designer

Note. The materialized views are disabled by default.

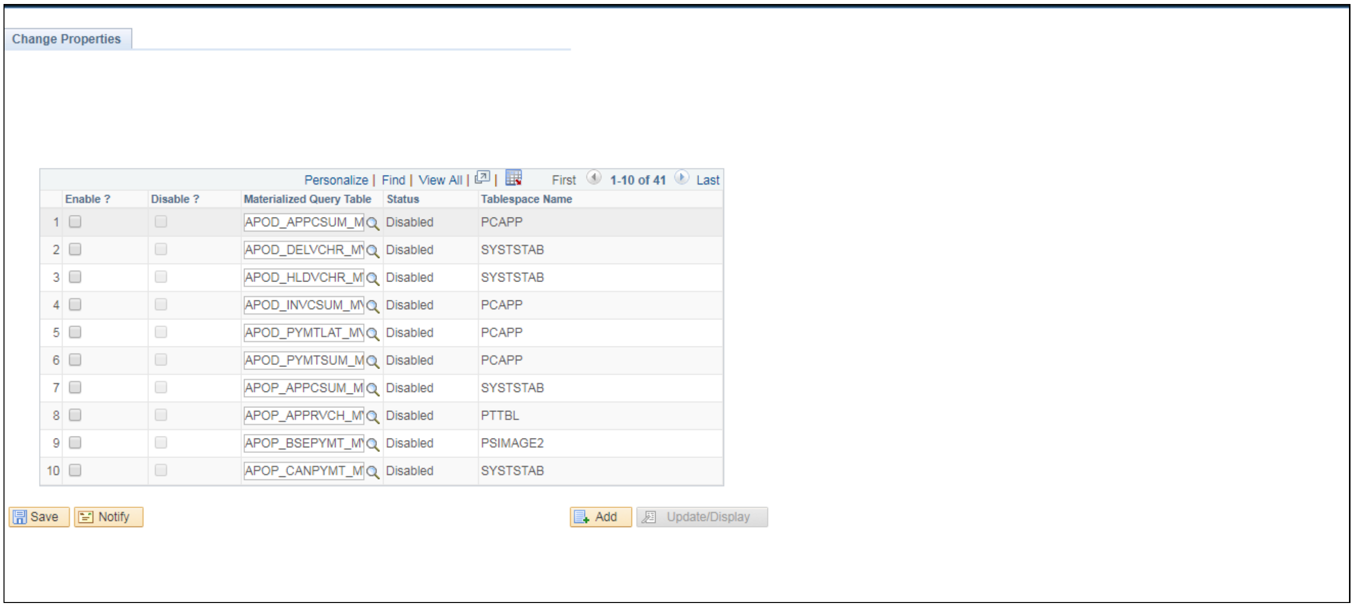
This section discussed the tasks to enable materialized views.

Task 5-1-1: Change Properties

To change properties:

Navigate to PeopleTools, Utilities, Administration, Materialized Views, Change Properties.

Note. The Change Properties page allows you to select views to enable or disable materialized views.



	Enable ?	Disable ?	Materialized Query Table	Status	Tablespace Name
1			APOD_APPCSUM_M	Disabled	PCAPP
2			APOD_DELVCHR_M	Disabled	SYSTSTAB
3			APOD_HLDVCHR_M	Disabled	SYSTSTAB
4			APOD_INVCSUM_M	Disabled	PCAPP
5			APOD_PYMTLAT_M	Disabled	PCAPP
6			APOD_PYMTSUM_M	Disabled	PCAPP
7			APOP_APPCSUM_M	Disabled	SYSTSTAB
8			APOP_APPRVCH_M	Disabled	PTTBL
9			APOP_BSEPYMT_M	Disabled	PSIMAGE2
10			APOP_CANPYMT_M	Disabled	SYSTSTAB

Change Properties: Materialized View

For more properties on this page,

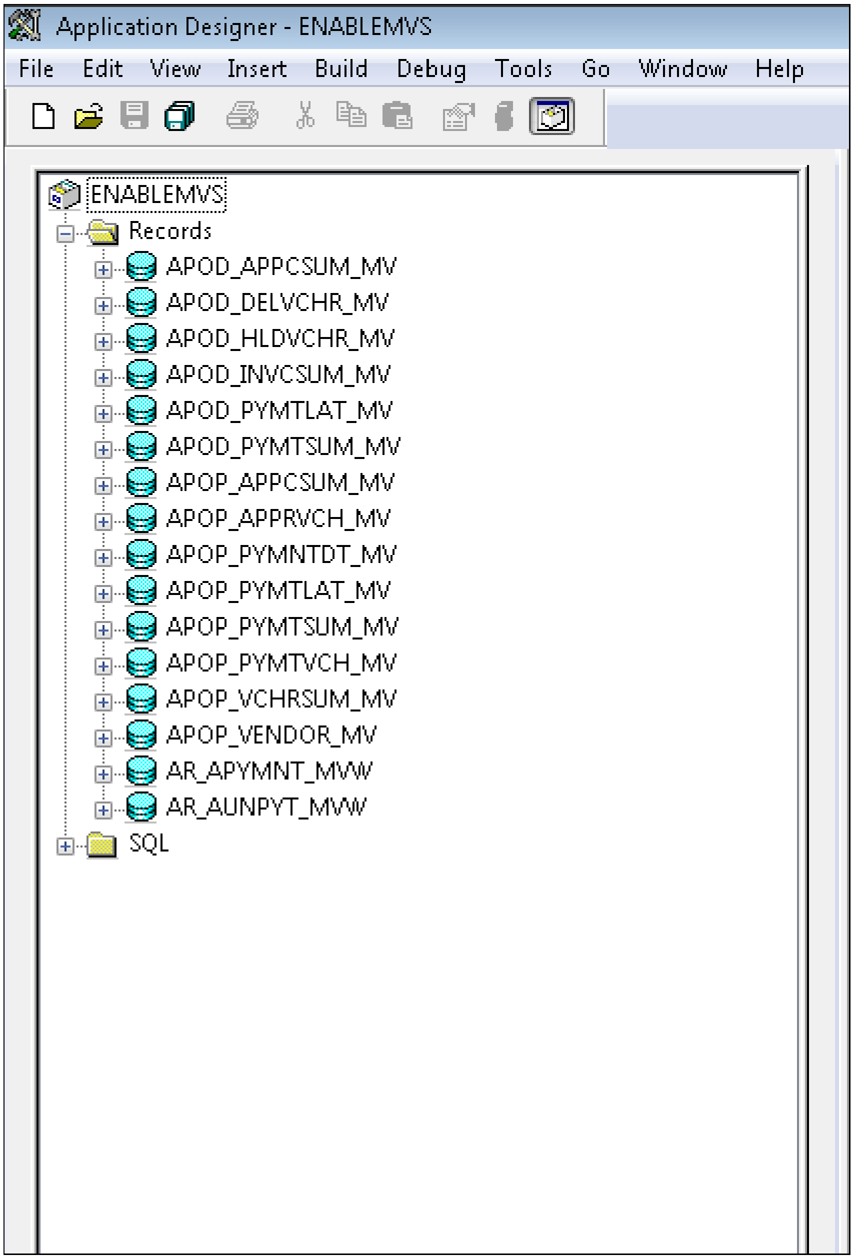
See PeopleSoft PeopleTools: Data Management, "Administering PeopleSoft Databases on Oracle", Using Materialized Views.

For specific information about views that can be converted into Materialized views, by product Receivables, Payables and Billing,

See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," Using Operation Metrics.

Task 5-1-2: Creating Materialized View in App Designer

Once the materialized views are enabled in the above task and saved, access Application Designer and open project ENABLEMVS consisting of all views enabled. Build this project so as to create materialized views.

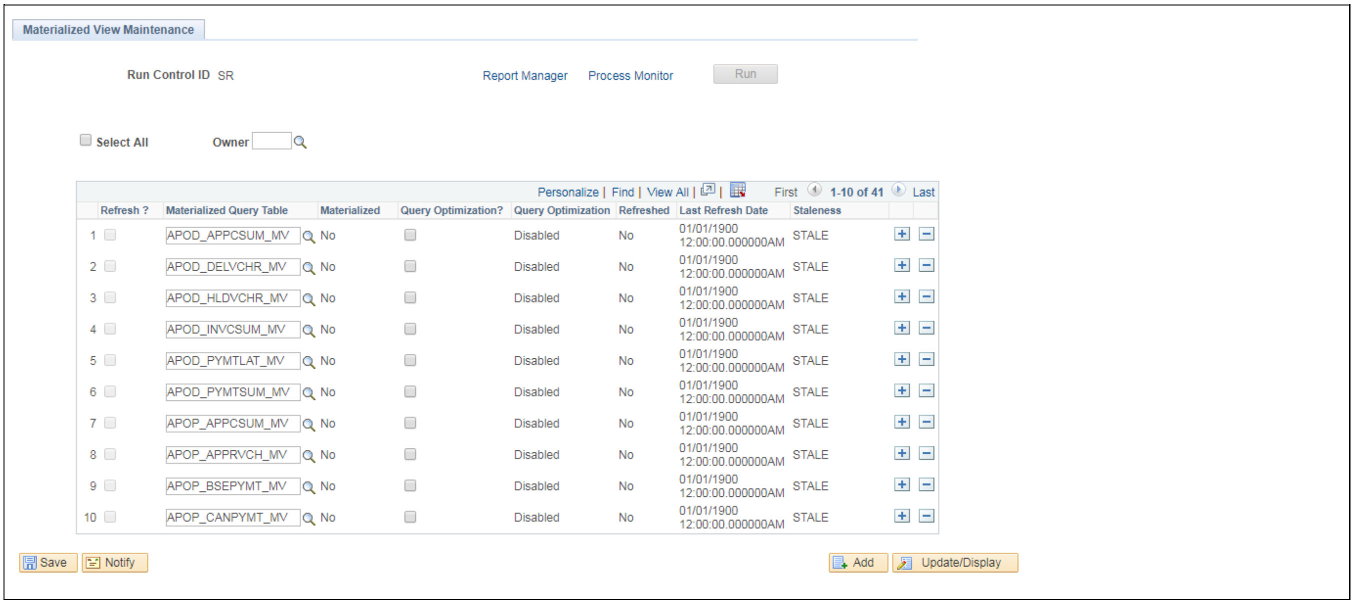


Application Designer: All Views

Task 5-2: Maintaining Materialized Views

For ongoing maintenance of materialized views, administrators can use the Materialized View Maintenance page **(PTMAT_MAINT).** Administrators must have the Materialized View Administrator role and permission list to access this page. Access the Materialized View Maintenance run control page.

Navigate to PeopleTools, Utilities, Administration, Materialized Views, Materialized View Maintenance.

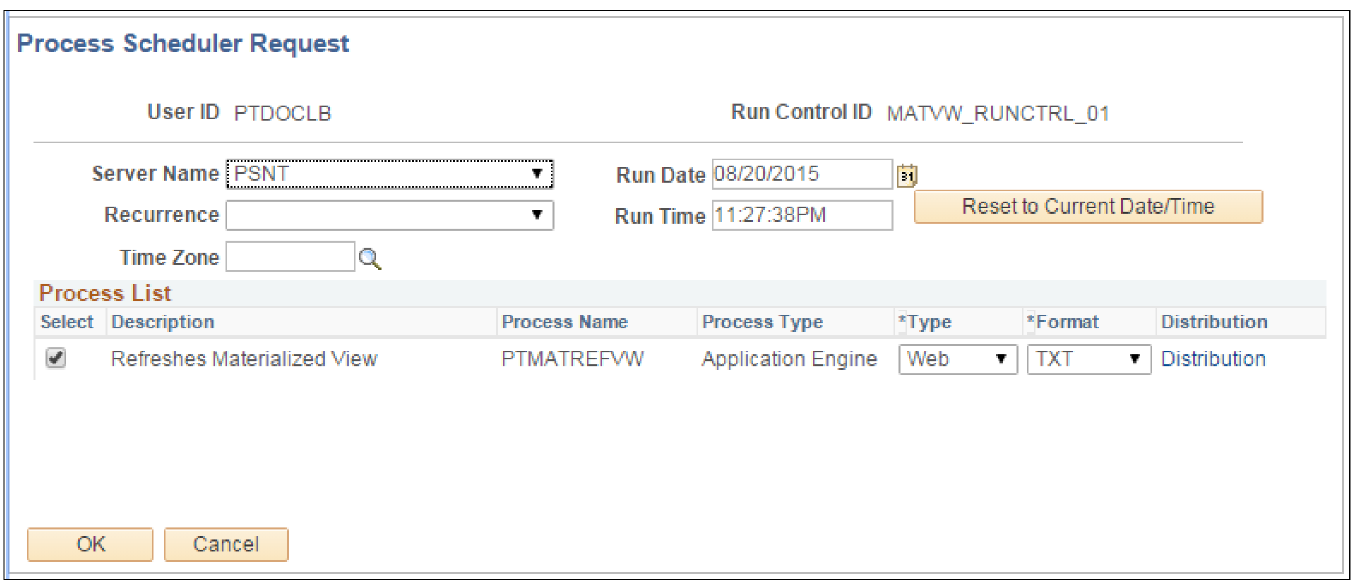


Materialized View Maintenance

This page contains a grid that is populated with a list of the records in the materialized views table, *PSPTMATVWDEFN* .

See PeopleSoft PeopleTools: Data Management, "Administering PeopleSoft Databases on Oracle", Using Materialized Views.

When you click the Run button, the *PTMATREFVW* Application Engine program executes. It brings up the Process Scheduler Request page. Enter the appropriate server on the page and click the OK button to initiate the process.



Process Scheduler Request page

Task 5-3: Analyzing the Tiles Used in Operation Metrics

This section discusses:

- Operation Metrics in Payables, Receivables and Billing
- Using Operation Metrics in Payables
- Using Operation Metrics in Receivables
- Using Operation Metrics in Billing

Operation Metrics in Payables, Receivables and Billing

PeopleSoft enables its users with a method to evaluate and manage operational efficiency within Receivables, Payables, and Billing. Using these performance indicators, users can determine the productivity of the operations as a whole as well as individual performance. Performance can be measured in quantity/amount of vouchers currently pending or processed over a given period of time.

Before accessing data on tiles, user preferences have to be set for all products.

Task 5-3-1: Using Operation Metrics in Payables

PeopleSoft Payables enables its users with a method to evaluate and manage operational efficiency within the Payables product. Using these indicators, you can determine the productivity of the Payables operations as a whole as well as individual performance.

See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," PeopleSoft Source to Settle Common Information, Using Operation Metrics in Payables.

To use operation metrics in payables:

1. Navigate to Fluid Home, Employee Self Service, Payables Operations Homepage.

   Note. Users must be granted the appropriate permissions to access tiles and pages by assigning a permission list ID.

2. On the Payables Operations page, click Voucher Approval Cycle Time tile to view grid data retrieved from materialized views enabled in previous tasks.

   Note. For all Payables tiles, click on the tile to view grid data retrieved from materialized views.

Task 5-3-2: Using Operation Metrics in Receivables

PeopleSoft Receivables enables its users with a method to evaluate and manage operational efficiency within the PeopleSoft Receivables product. Using these indicators, you can determine the productivity of the Receivables operations as a whole as well as individual performance.

See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," PeopleSoft Source to Settle Common Information, Using Operation Metrics in Receivables.

To use operation metrics in receivables:

1. Navigate to Fluid Home, Employee Self Service, Credit to Cash Operations.

Note. Users must be granted the appropriate permissions to access tiles and pages by assigning a permission list ID.

2. On the Credit to Cash Operations page, click Unapplied Payments tile to view grid data retrieved from materialized views enabled in above tasks.

Note. For all Receivables tiles, click on tile to view grid data retrieved from materialized views.

Task 5-3-3: Using Operation Metrics in Billing

Users need a method to evaluate and manage operational efficiency within the PeopleSoft Billing product. Using these indicators, you can determine the productivity of the billing operations as a whole as well as individual performance. The performance can be measured in quantity/amount of invoices currently pending or processed over a given period of time.

See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," PeopleSoft Source to Settle Common Information, Using Operation Metrics in Billing.

To use operation metrics in billing:

1. Navigate to Fluid Home, Employee Self Service, Credit to Cash Operations.

Note. Users must be granted the appropriate permissions to access tiles and pages by assigning a permission list ID.

2. On the Credit to Cash Operations page, click Invoices by Specialist tile to view grid data retrieved from materialized views enabled in above tasks.

Chapter 6

Installing PeopleSoft 9.2 General Ledger

This chapter discusses:

- Prerequisites
- Changing a URL Definition for General Ledger File Import (Optional)
- Defining an Environmental Variable on a Process Scheduler Server
- Running File Import Processes Using the z/OS Database

Prerequisites

This section describes the steps necessary to establish the file attachment storage location for documents that you import to PeopleSoft General Ledger and the database specifics for various file import processes.

The following table lists the setup dependencies for the file import processes in this chapter:

Process	Description
GL_JRNL_IMP	Flat file journal import
GL_LED_IMP	Flat file ledger import
GL_EXCL_JRNL	Spreadsheet journal batch import
GL_EXCL_BATC	Spreadsheet Journal Batch Import with Edit
GL_F2_MAF	FACTS II Load MAF Data
GLFACTSI_MAF	FACTS I Load Data (FACTSI MAF, SGL Accounts, Trading Partners)
GL_GOALS_IMP	GOALS Disbursement/Receipt Files (Ledger Activity and Trial Balance)

Task 6-1: Changing a URL Definition for General Ledger File Import (Optional)

The URL definition GL_FILE_IMPORT defines the storage location of the file attachment. By default, this points to a database record. You may want to change the storage location of the file attachment to another location, such as an FTP server. This is optional.

To change the URL definition:

1. Select PeopleTools, Utilities, Administrations, URLs.
2. Open GL_FILE_IMPORT.
3. Change the URL definition to an FTP server location of your choice.

See Also

PeopleTools: PeopleCode Developer's Guide

Task 6-2: Defining an Environmental Variable on a Process Scheduler Server

The system requires that you define an environmental variable, PS_FILEDIR. This variable defines the temporary flat file location on the process scheduler that runs the file import process.

- If you are using a UNIX or DB2 z/OS process scheduler, edit the psconfig.sh file and specify the flat file location in the environment variable PS_FILEDIR. For example:

  ```
  PS_FILEDIR="/data1";export PS_FILEDIR
  ```

- If you are using a Microsoft Windows process scheduler, from your Start menu select Programs, Control Panel, System. Select the Advanced Tab and click Environment Variables. Add or modify the system variable PS_FILEDIR and specify its value. For example:

  ```
  C:\TEMP
  ```

Note. For more technical information on this topic, see the information on `GetFile()` in the *PeopleTools: PeopleCode Language Reference* product documentation, or consult your system administrator.

Task 6-3: Running File Import Processes Using the z/OS Database

This is a general reminder for those who run import processes. If the import process enables you to specify Character Set, select the Character Set appropriate to the flat file that you are importing. For example, you may select ISO_8859-6 for Arabic, and JIS_X_0208 or Shift_JIS for Japanese.

For those who are running the following specific import processes:

```
GL_F2_MAF
GLFACTSI_MAF
GL_GOALS_IMP
```


If you have a DB2 for z/OS database and you prepare the flat file in ASCII format, you can only run the process on a Microsoft Windows or a UNIX process schedule server. If you prepare the flat file in EBCDIC format, you can only run the import process on a DB2 z/OS process schedule server. For all other databases, there is no limitation on the type of process schedule servers. The appropriate process scheduler should be set up for these processes.

Chapter 7

Installing and Setting Up Forms Processing for PeopleSoft 9.2 Grants

This chapter discusses:

- Understanding Forms Processing
- Downloading the Forms from the Sponsor Web Sites
- Setting Up the Forms URL Maintenance Area in PeopleSoft
- Entering the Names of the PDF Templates (Optional)
- Printing the Forms (Optional)
- Viewing Reports

Understanding Forms Processing

The PeopleSoft Enterprise Grants forms printing solution uses file layouts to generate XML. This is accomplished by using existing PeopleSoft PeopleTools functionality. Through the use of XML/XFDF, the PeopleSoft Grants forms solution maps all of the required data elements to the actual sponsor forms. As a result, you can edit and print forms online using Adobe Acrobat Reader 5.0 (or higher). There is no longer a need to engage an additional third party component application for any form printing requirements because the solution uses standard PeopleSoft PeopleTools technology.

You can use the new forms printing solution with the following forms:

- Grant Application (PHS 398)

  This is the set of proposal application forms that the National Institutes of Health requires for funding requests. This form set is in the process of being superceded by SF-424 R&R submissions through Grants.gov.
- Non-Competing Grant Progress Report (PHS 2590)

  This is an interim progress report that the National Institutes of Health requires recipients to submit for funding. You typically submit this form on an annual basis.

Task 7-1: Downloading the Forms from the Sponsor Web Sites

To set up the forms solution for your database, you must download the following PDF files from the sponsor web sites:

- http://grants.nih.gov/grants/funding/2590/2590_forms.pdf

  Full Package of 2590 Reports that includes: Grant Progress Report, Form Page 1 - Continued, Detailed Budget for Next Budget Period – Direct Costs Only, Budget Justification/Current Budget Period, Progress Report Summary, Checklist, All Personnel Report, Next Budget Period, Targeted/Planned Enrollment Table, Inclusion Enrollment Report, Trainee Diversity Report.

- http://grants.nih.gov/grants/funding/phs398/398_forms.pdf

  Grant Application.
- http://grants.nih.gov/grants/funding/phs398/biosketch.pdf

  Biographical Sketch.
- http://grants.nih.gov/grants/funding/phs398/continuation.pdf

  Continuation Format Page.
- http://grants.nih.gov/grants/funding/phs398/fp4.pdf

  Detailed Budget for Initial Budget Period Direct Costs Only.
- http://grants.nih.gov/grants/funding/2590/enrollment.pdf

  Targeted/Planned Enrollment Form.

Place these files in the location that is defined for the URL maintenance area, as described in the following section.

See Setting Up the Forms URL Maintenance Area in PeopleSoft.

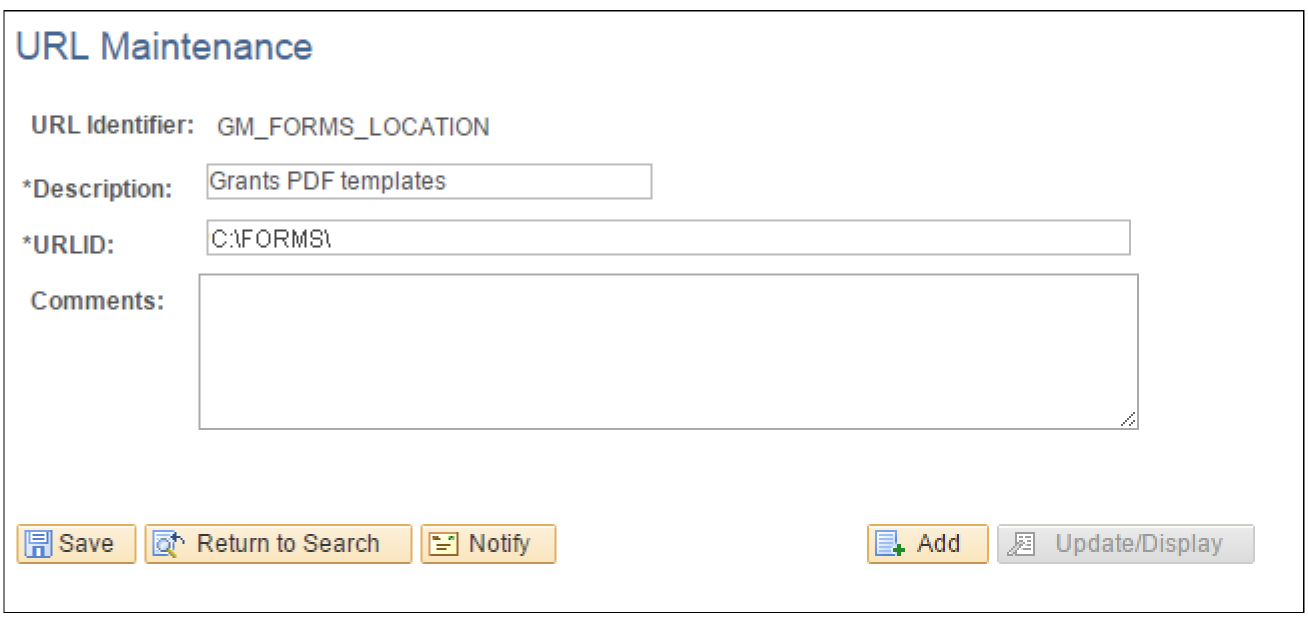
Task 7-2: Setting Up the Forms URL Maintenance Area in PeopleSoft

In this section you will set up the Forms URL Maintenance Area.

To set up the Forms URL Maintenance Area:

1. Select PeopleTools, Utilities, Administration, URLs.
2. On the URL search page, search for and select *GM_FORMS_LOCATION*.

   The URL Maintenance page appears, as shown in the following example:



URL Maintenance page

3. In the URL field, enter the location where you placed the forms.

   This location can be a file system location such as C:\FORMS\. In this case, users must have access to this location when viewing the printed forms. This location can also be a web address such as http://www.university.edu/Administration/Grants/Forms/.

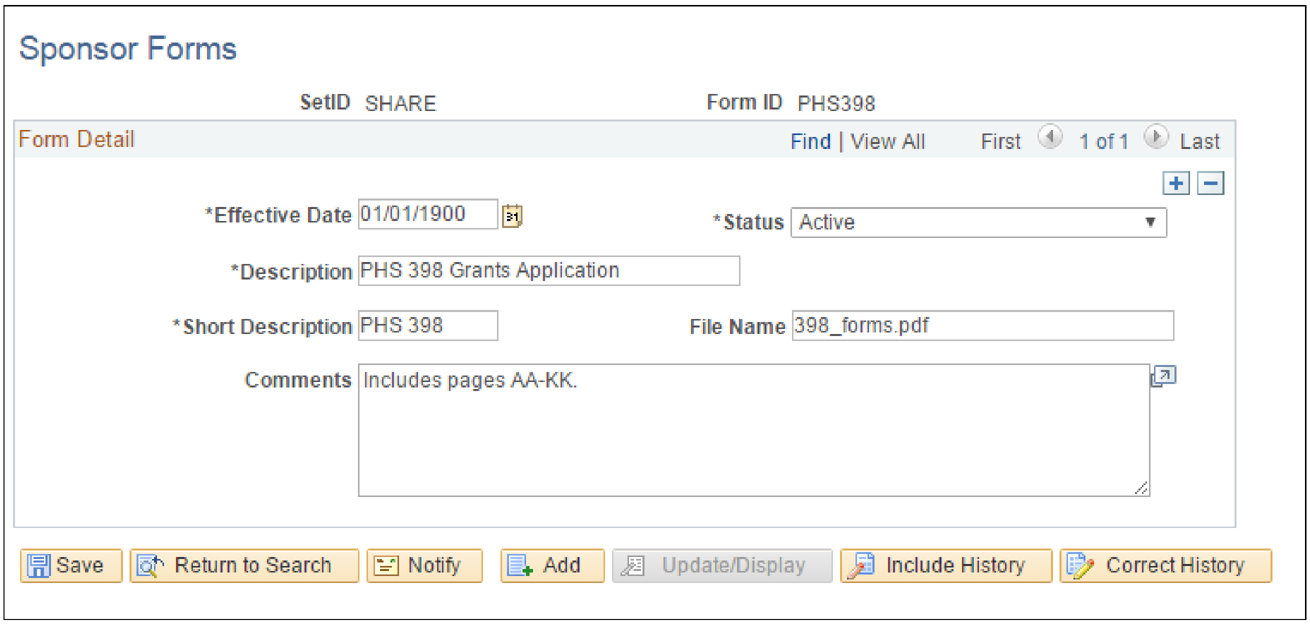
Task 7-3: Entering the Names of the PDF Templates (Optional)

In this step you enter the names of the PDF templates. This step is optional.

To enter the PDF template names:

1. Select Set Up Financials/Supply Chain, Product Related, Grants, Sponsor Forms.

   The Sponsor Forms page appears, as shown in the following example:



Sponsor Forms page

2. Search for and access the pages for the forms in the following table using an appropriate SETID value.

   Then ensure that the file names listed in the following table are reflected in the File Name field.

Note. If you are making changes to currently effective dated values, you must do so by first clicking the Correct History button to enter the correction mode.

Form ID	File Name (example)
PHS398	398_Forms.PDF
2590	2590_Forms.PDF
NIHMOD	398_Modular.PDF

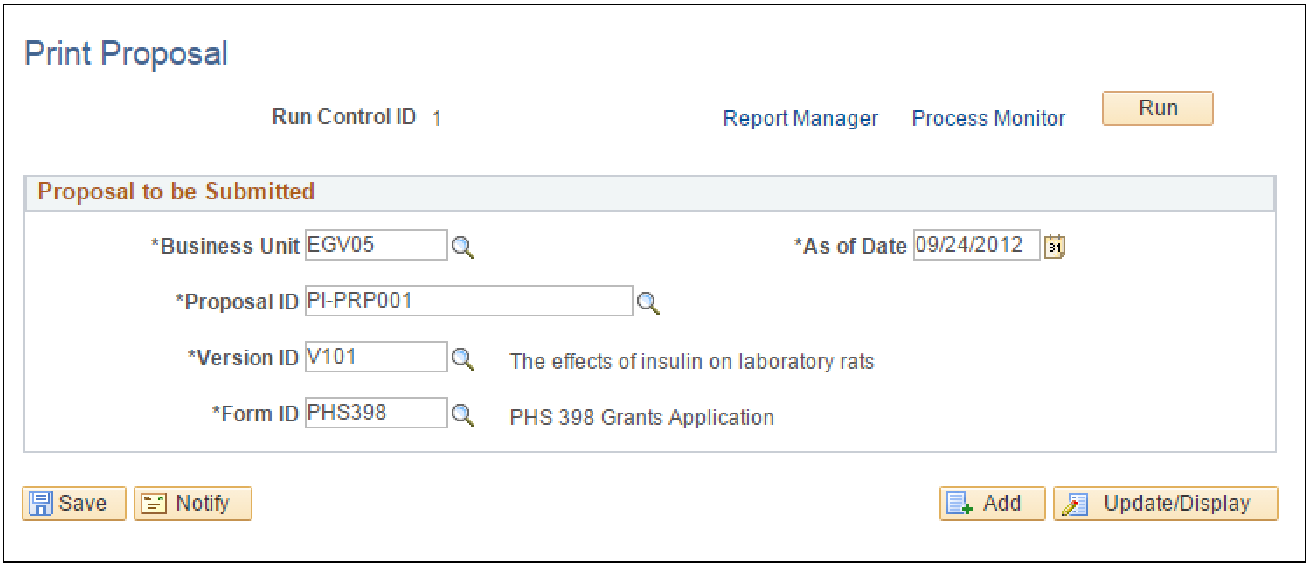
Task 7-4: Printing the Forms (Optional)

In this step you print the forms. This step is optional.

To print the forms:

1. Select Grants, Proposal, Print Proposal.

   The Print Proposal page appears, as shown in the following example:



Print Proposal page

2. Create your own Run Control ID.
3. Click the look up button (magnifying glass) to select a value for the following fields:
   - Business Unit
   - Proposal ID
   - Version ID
   - Form ID
4. Click the Run button.

   The system displays the Process Scheduler Request page.
5. In the Server Name drop-down list box, select the server that you want to use, and then click OK.

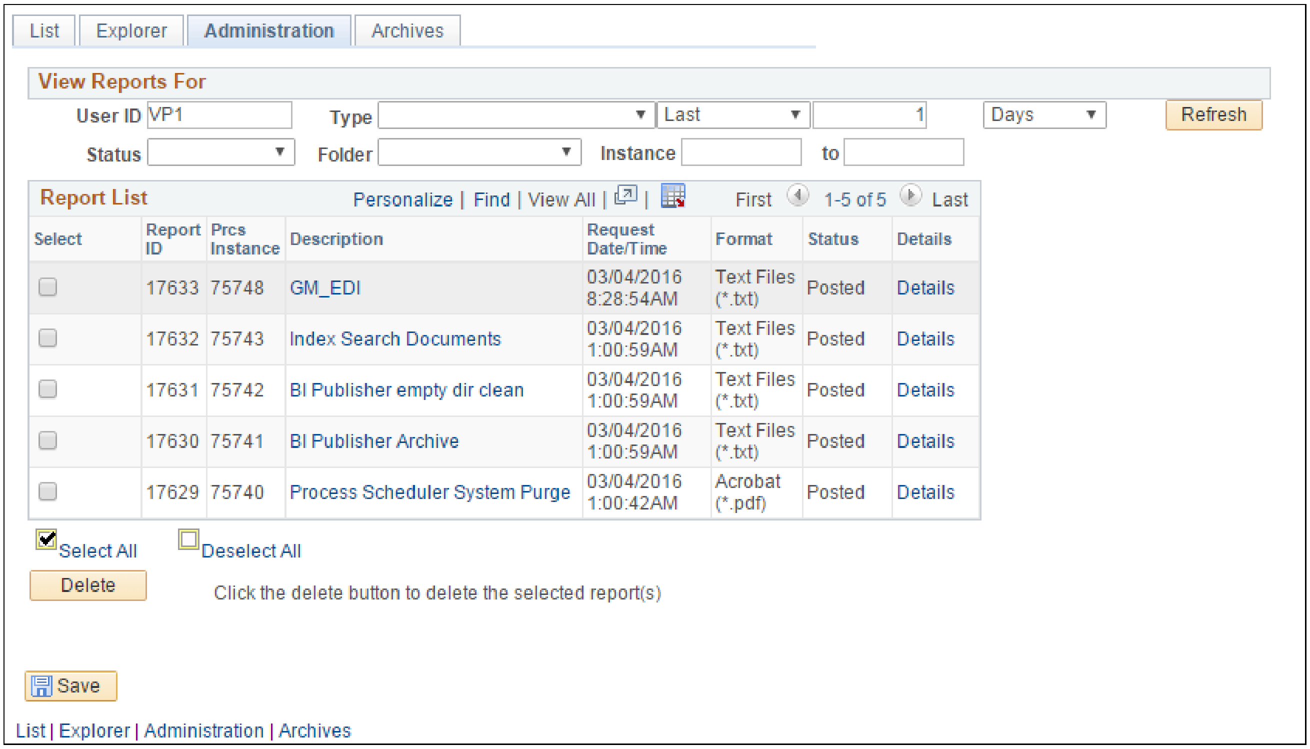
Task 7-5: Viewing Reports

You need Acrobat Reader 5.0 or higher to view reports.

To view reports:

1. Select Reporting Tools, Report Manager, Administration.

   The Report Manager page-Administration tab appears as shown in the following example:

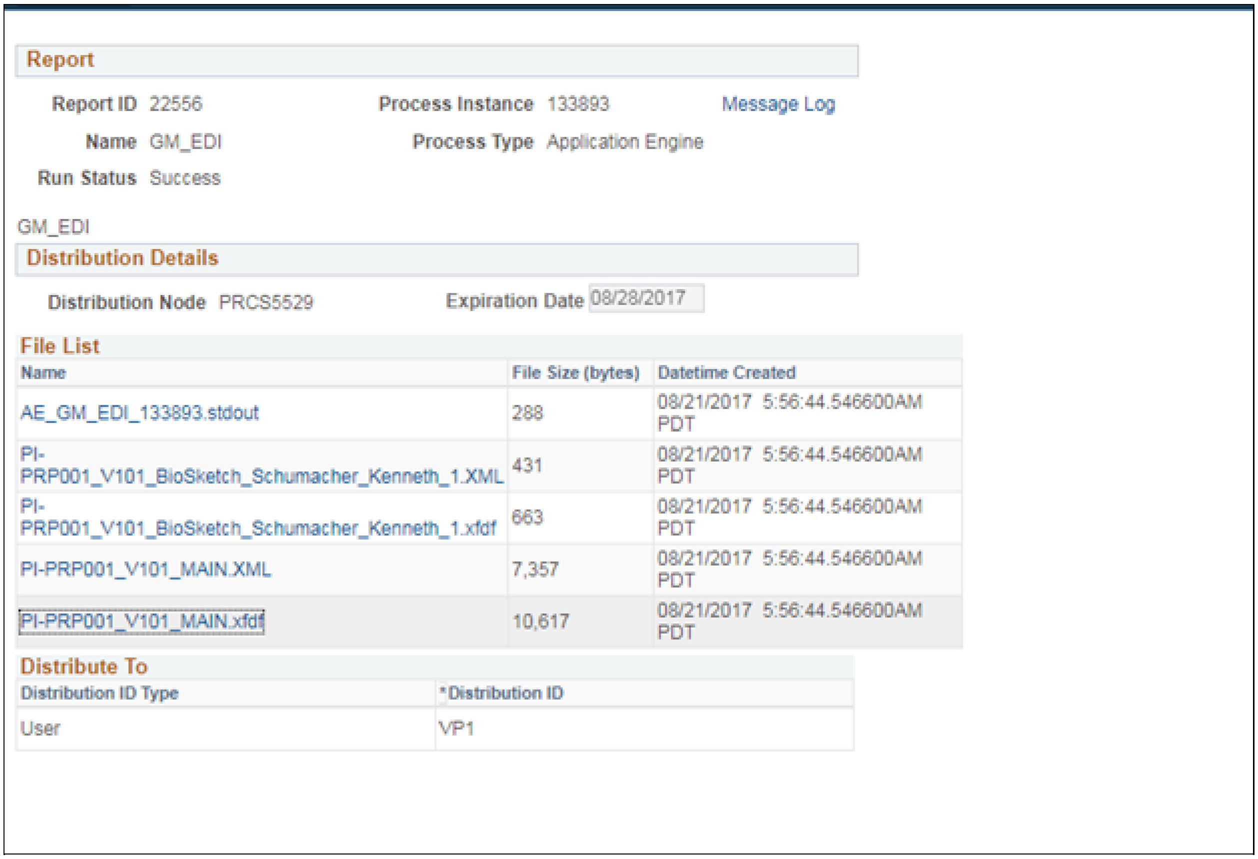


Report Manager page- Administration tab

2. On the Report Manager page- Administration tab, locate your process instance (the report description is GM_EDI).

3. Click the Details link in the GM_EDI row to view a list of the files that relate to the proposal.

   The Report Detail page appears, as shown in the following example:



Report Detail page

4. On the Report Detail page, view or print a file by clicking the file link and downloading the file to a local location.
5. After you download the file, double-click the local file to open and print.

Chapter 8

Installing PeopleSoft 9.2 Expenses

This chapter discusses:

- Configuring PeopleSoft Integration Broker
- Configuring the Employee Portal Servlet URL

Task 8-1: Configuring PeopleSoft Integration Broker

This section discusses:

- Understanding the PeopleSoft Integration Broker Configuration
- Setting Up Gateways
- Activating Queue Definitions
- Setting up Service and Handlers
- Verifying the Message Channel Status

Understanding the PeopleSoft Integration Broker Configuration

This task details the configuration of the PeopleSoft Integration Broker for Approvals.

Task 8-1-1: Setting Up Gateways

To set up the local gateway and load balancer:

1. Navigate to PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and examine the Nodes name
3. Look at the Default Local Node column and search for the "Y" listed row.

   Important! Be sure to make note of your Node name. This information is required while configuring the Gateway Properties.

   ---

4. Set up a Gateway to begin configuring PeopleSoft Integration Broker.

   See the "Appendix: Applying Common Installation Instructions," Setting Up Integration Gateway for instructions to set up a gateway.
5. Next, activate the local domain.

   See the "Appendix: Applying Common Installation Instructions," Activating the Domain for instructions to activate the local domain.

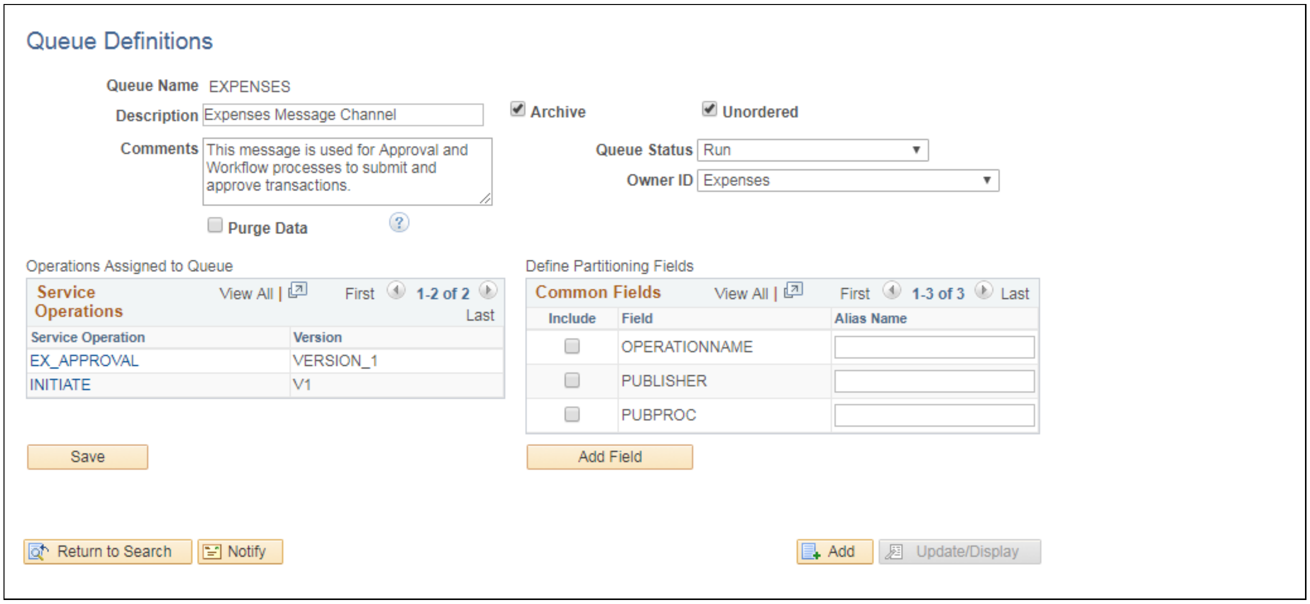
Task 8-1-2: Activating Queue Definitions

You activate the queue definitions.

To activate:

1. Select PeopleTools, Integration Broker, Integration Setup, Queues.
2. On the Queue search page, search for and select the queue name *EXPENSES.*

   The Queue Definitions page appears, as shown in the following example:



Queue Definitions page

3. On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
4. Click Save.

Task 8-1-3: Setting up Service and Handlers

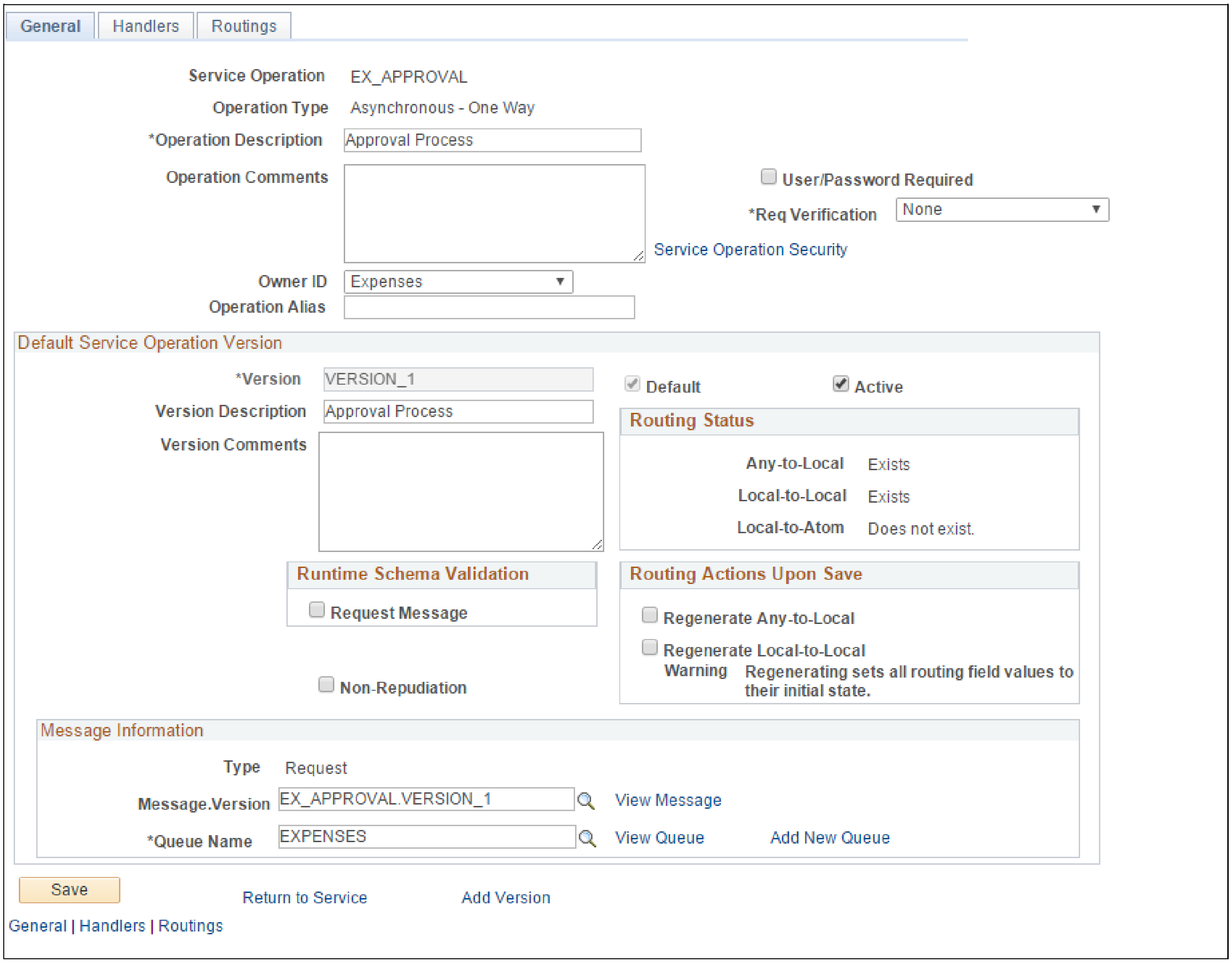
You set up the service and handlers.

To set up service and handler:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.

2. On the Service Operations search page, search for and select the service operation *EX_APPROVAL*.

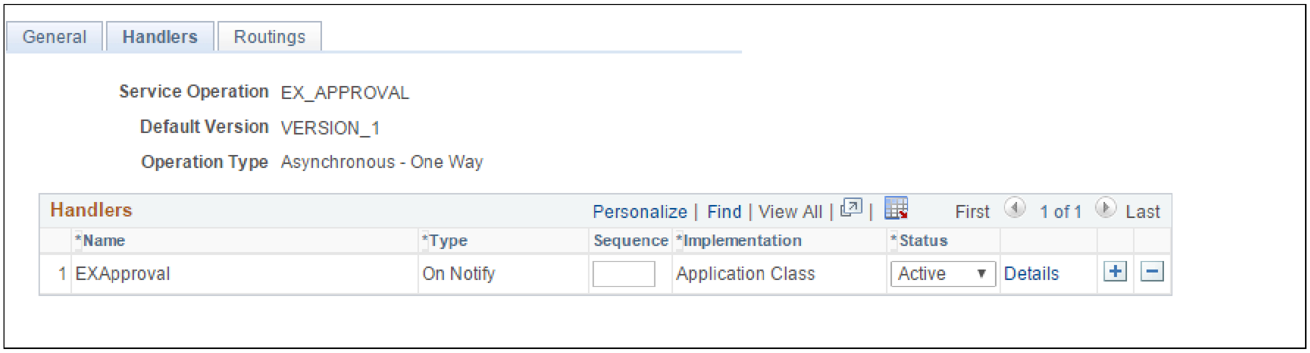
   The Service Operations - General page appears, as shown in the following example:



Service Operations-General page

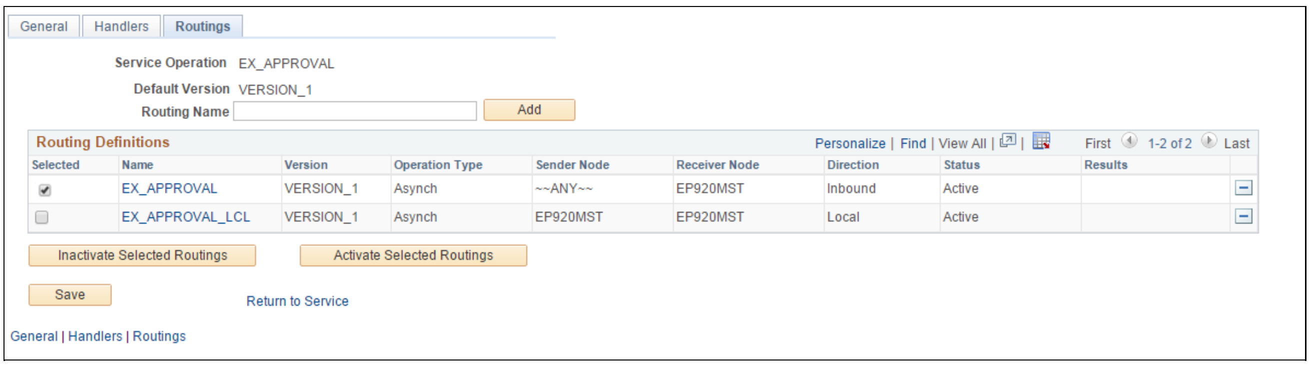
3. On the General page, in the Default Service Operation Version group box, select the Active check box.
4. Click Save.

5. Select the Handlers tab to access the Handlers page, as shown in the following example:



Service Operations - Handlers page

6. On the Handlers page, in the Status field, select *Active* from the drop-down list box.
7. Click Save.
8. Select the Routings tab to access the Routings page, as shown in the following example:



Service Operation-Routings page

9. On the Routings page, in the Routing Definitions group box, select the check boxes for the routings that you want to activate.
10. Click the Activate Selected Routings button.
11. Click Save.

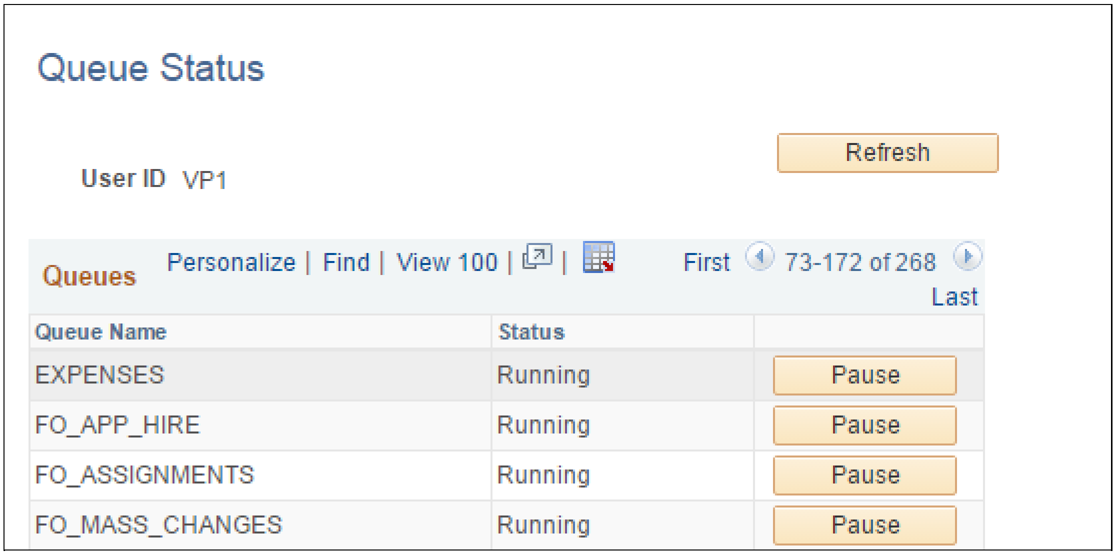
Task 8-1-4: Verifying the Message Channel Status

Then, verify the message channel status.

To run the message channel:

1. Select PeopleTools, Integration Broker, Service Operations Monitor, Administration, Queue Status.

   The Queue Status page appears, as shown in the following example:



Queue Status page

2. On the Queue Status page, in the Status column, verify that the status for queue name EXPENSES is *Running*.

   If the status is *Paused*, click the Run button next Status column in the EXPENSES row.

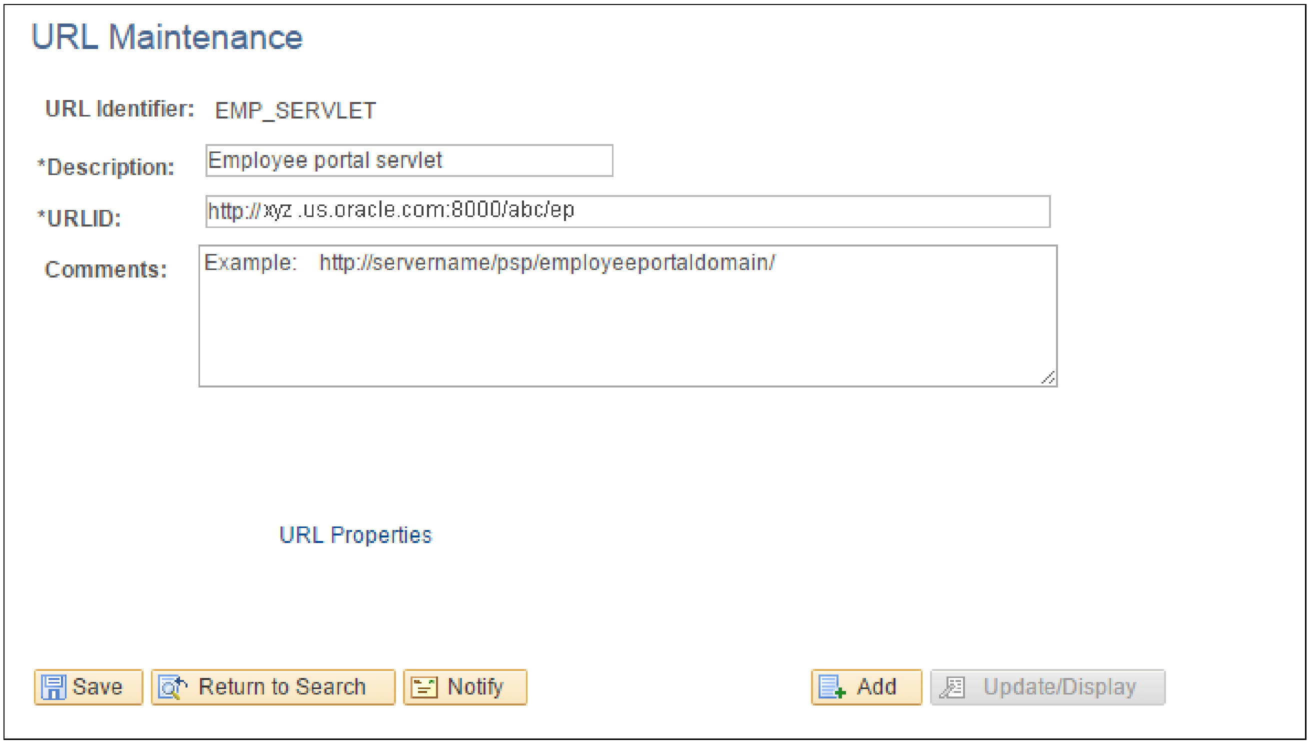
Task 8-2: Configuring the Employee Portal Servlet URL

To configure the URL for the Employee Portal Servlet (EMP_SERVLET):

1. Select PeopleTools, Utilities, Administration, URLs.

2. On the URL search page, search for and select the URL identifier EMP_SERVLET.

   The URL Maintenance page appears, as shown in the following example:



URL Maintenance page

3. On the URL Maintenance page, in the URLID field, enter the URL to your machine's server name and append */psp/<employeeportaldomain>/*

   For *<employeeportaldomain>* use the site name of your employee portal domain. For example, if the web server machine name is serverx, and the employee portal domain is empdb910, the URLID is http://serverx/psp/empdb910.

4. Click Save.

Chapter 9

Installing PeopleSoft 9.2 Pay/Bill Management

This chapter discusses:

- Understanding PeopleSoft 9.2 Pay/Bill Management
- Prerequisites
- Verifying Integration Points
- Verifying the Installation Tables for PeopleSoft HCM and PeopleSoft FSCM

Understanding PeopleSoft 9.2 Pay/Bill Management

Oracle delivers all PeopleSoft Pay/Bill Management Enterprise Integration Points (EIP) with settings enabled for full functionality, with the exception of PeopleSoft Integration Broker web services. When you integrate PeopleSoft Pay/Bill Management with PeopleSoft HRMS, you must activate PeopleSoft Integration Broker web services. For more information, refer to the following documentation:

See *PeopleSoft FSCM: Pay/Bill Management*

See *PeopleTools: Integration Broker Administration,* for your release.

Prerequisites

You must install PeopleSoft Pay/Bill Management 9.2 for PeopleSoft HRMS before you can fully utilize the PeopleSoft Pay/Bill Management application. The complete installation instructions for PeopleSoft Pay/Bill Management for PeopleSoft HRMS are available on My Oracle Support.

See *PeopleSoft Human Capital Management Installation*

Note. Oracle only supports PeopleSoft Pay/Bill Management on Microsoft SQL Server, Oracle and DB2 for Linux, UNIX, and Microsoft Windows.

Task 9-1: Verifying Integration Points

This section discusses:

- Understanding Integration Points Verification
- Setting Up Node Definitions for Single Signon
- Setting Up Portal Nodes

- Setting Up Single Signon
- Activating Queue Definitions
- Setting Up the PeopleSoft System-Delivered Service Operations

Understanding Integration Points Verification

In this task, you verify integration points for the PeopleSoft Financials/Supply Chain Management (FSCM) 9.2 and PeopleSoft Human Capital Management (HCM) 9.2 environments. Each environment contains both PSFT_EP and PSFT_HR message nodes. You must set both message nodes in both the PeopleSoft FSCM 9.2 and PeopleSoft HCM 9.2 environments.

PSFT_EP is the default local node in PeopleSoft FSCM, but PSFT_HR also exists in PeopleSoft FSCM. This section details how to set both nodes in the PeopleSoft FSCM environment.

PSFT_HR is the default local node for PeopleSoft HCM, but PSFT_EP also exists in PeopleSoft HCM. This section details how to set both nodes in the PeopleSoft HCM environment.

Note. Verify that your application servers, for both the PeopleSoft HCM and PeopleSoft FSCM installations, are set to manage Pub/Sub server.

Task 9-1-1: Setting Up Node Definitions for Single Signon

The PeopleSoft FSCM and PeopleSoft HCM environments contain both message nodes PSFT_EP and PSFT_HR. You must set both message nodes in both environments.

PSFT_EP is the default local node in PeopleSoft FSCM. PSFT_HR also exists in PeopleSoft FSCM and must be set.

PSFT_HR is the default local node in PeopleSoft HCM. PSFT_EP also exists in PeopleSoft HCM and must be set.

See the "Appendix: Applying Common Installation Instructions," Setting Up Message Node Definitions for instructions to set up node definitions.

Task 9-1-2: Setting Up Portal Nodes

The PeopleSoft FSCM and PeopleSoft HCM environments contain both ERP and HRMS portal nodes. You must set both portal nodes in both environments.

See the "Appendix: Applying Common Installation Instructions," Setting Up Portal Nodes for instructions to set up portal nodes.

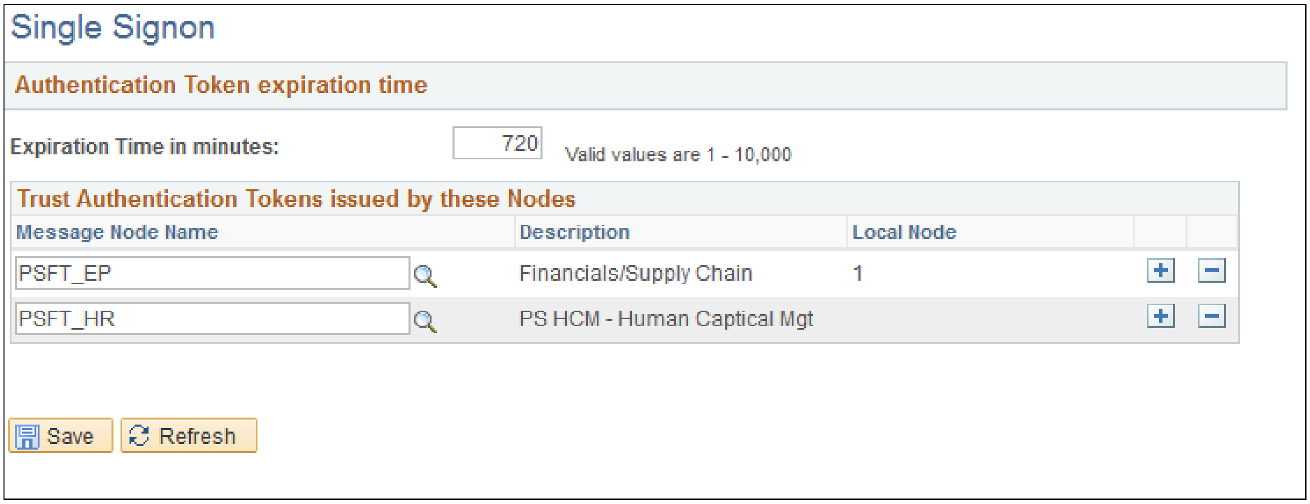
Task 9-1-3: Setting Up Single Signon

Setting Up Single Signon in PeopleSoft FSCM

To verify Single Signon in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Security, Security Objects, Single Signon.

   The Single Signon page appears, as shown in the following example:



Single Signon page

2. On the Single Signon page, in the *Trust Authentication Tokens issued by these Nodes* group box, specify the message nodes PSFT_EP and PSFT_HR, as shown in the preceding example.
3. Click Save.

Setting Up Single Signon in PeopleSoft HCM

To verify Single Signon in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.2 environment, select PeopleTools, Security, Security Objects, Single Signon.
2. On the Single Signon page, in the *Trust Authentication Tokens issued by these Nodes* group box, specify the message nodes PSFT_EP and PSFT_HR, as shown in the preceding example.
3. Click Save.

Next, set up the Integration Gateways.

See the "Appendix: Applying Common Installation Instructions," Setting Up Integration Gateways for instructions.

Next, activate the local domain.

See the "Appendix: Applying Common Installation Instructions," Activating the Domain for instructions.

Task 9-1-4: Activating Queue Definitions

Understanding Queue Definition Activation

The following queue definitions must be active for PeopleSoft Pay/Bill Management:

```
ACTION_REASON
ACTUAL_TIME
COMPETENCY
CUSTOMER
```



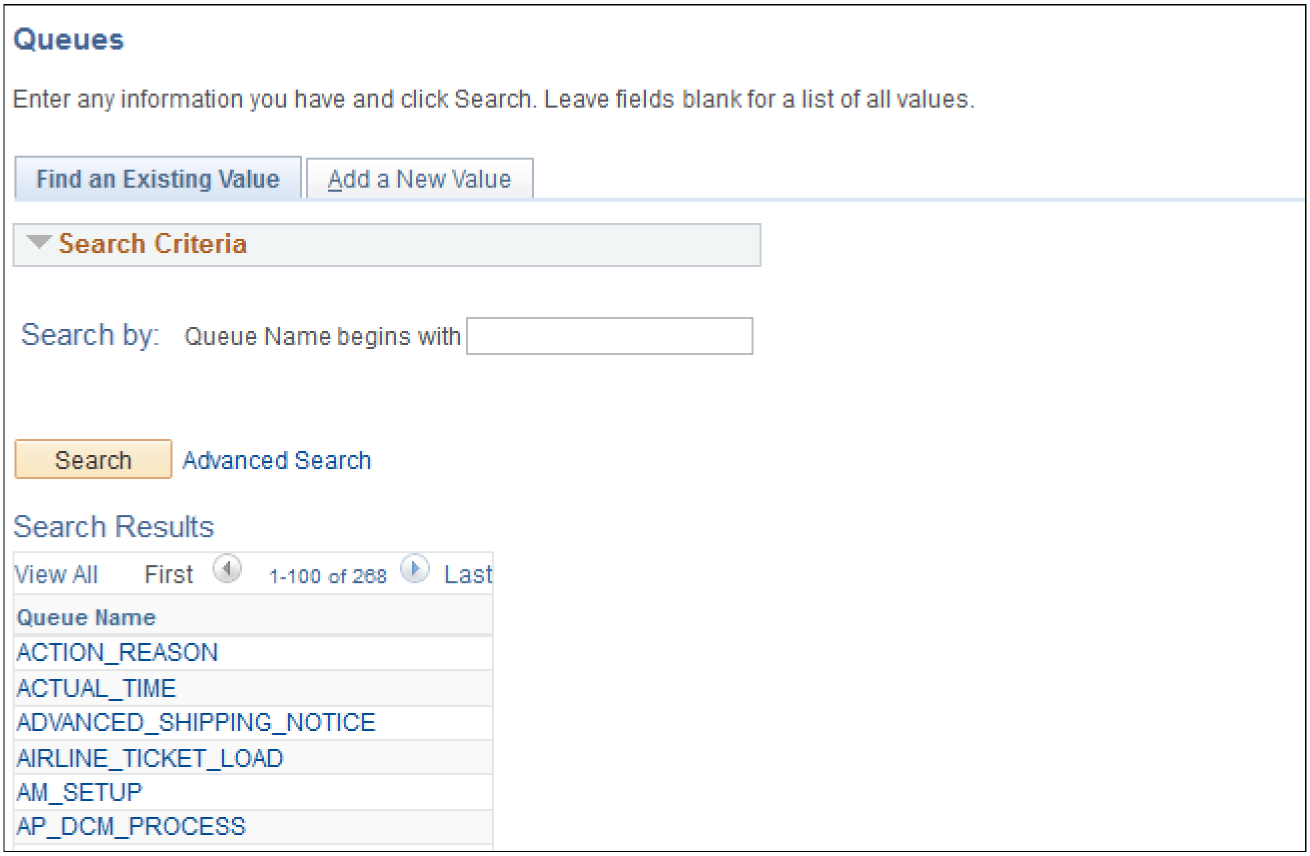
```
ELAPSED_TIME
ENTERPRISE_SETUP
ESTIMATED_TIME
FO_APP_HIRE
FO_ASSIGNMENTS
FO_MASS_CHANGES
FO_SETUP
FO_SYNC
GL_SETUP
HR_SETUP
MARKET_RATES
MARKET_RATE_LOAD
PAYGROUP_SETUP
PERSON_DATA
PERSON_SETUP
PROJECTS_SETUP
RATING_MODEL
TIME_AND_LABOR_SETUP
```

Activating Queue Definitions in PeopleSoft FSCM

To activate queue definitions in the PeopleSoft FSCM environment:

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Queues.

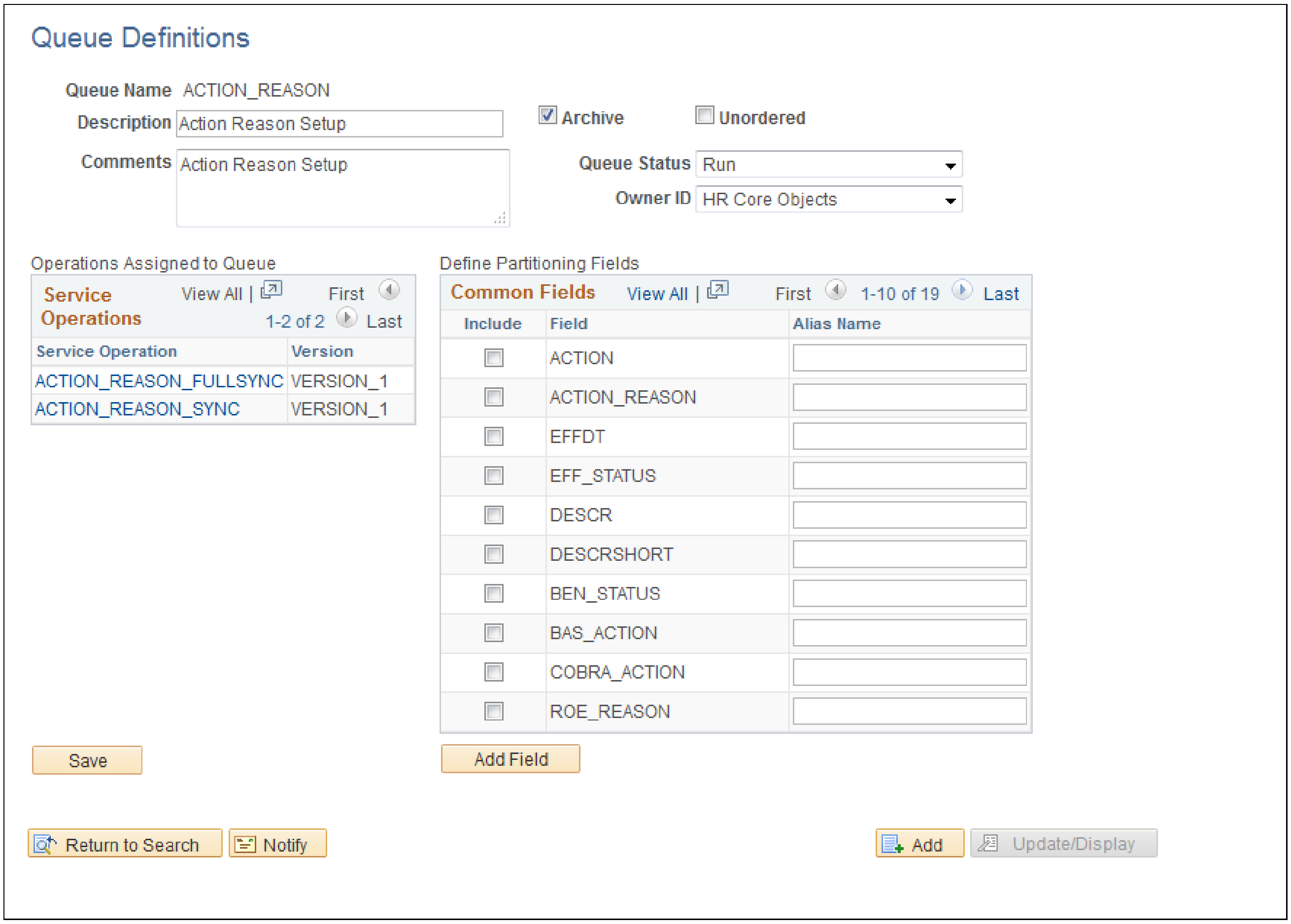
   The Queues search page appears, as shown in the following example:



Queue Search Page

2. On the Queues search page, search for and select the queue name *ACTION_REASON*.

   The Queue Definitions page appears, as shown in the following example:



Queue Definitions page

3. On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
4. Click Save.
5. Repeat the steps above for the remaining Queues listed in the beginning of this task.

Activating Queue Definitions in PeopleSoft HCM

To activate queue definitions in the PeopleSoft HCM environment:

1. In your PeopleSoft HCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Queues.
2. On the Queues search page, search for and select the queue name *ACTION_REASON*.
3. On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
4. Click Save.
5. Repeat the steps above for the remaining Queues listed in the beginning of this task.

Task 9-1-5: Setting Up the PeopleSoft System-Delivered Service Operations

The PeopleSoft system-delivered service operations are meant to keep tables in sync between PeopleSoft FSCM 9.2 and PeopleSoft HCM 9.2. You must make decisions about how to implement the integration. These decisions determine your tasks in activating handlers and routings.

See *PeopleSoft FSCM: PeopleSoft Pay/Bill Management,* "Using Enterprise Integration Points."

Task 9-2: Verifying the Installation Tables for PeopleSoft HCM and PeopleSoft FSCM

This section discusses:

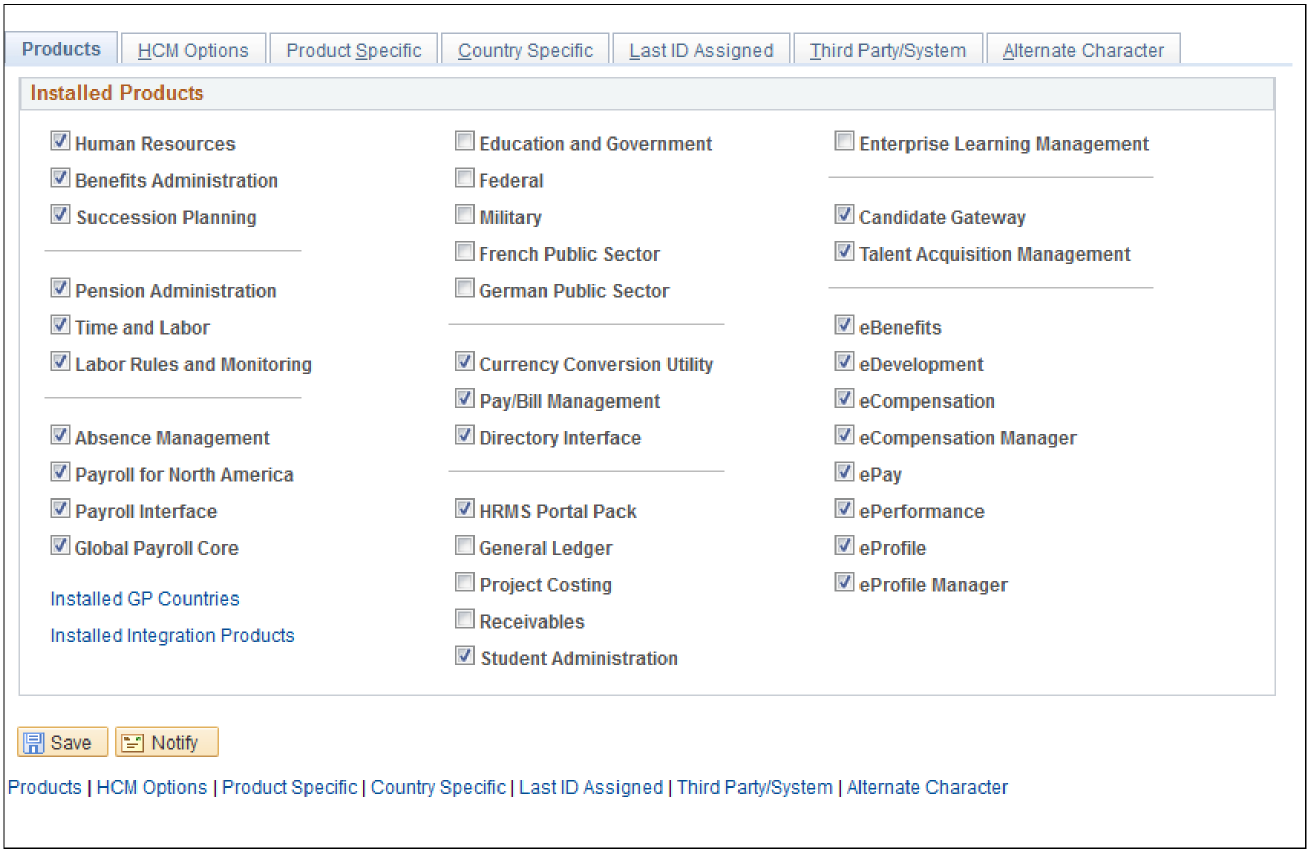
- Verifying the Installation Table for PeopleSoft HCM
- Verifying the Installation Table for PeopleSoft FSCM

Task 9-2-1: Verifying the Installation Table for PeopleSoft HCM

In this step, you verify the selection of the Pay/Bill Management and Project Costing installation options in the Installation table.

1. In PeopleSoft HCM, select Set Up HCM, Install, Installation Table.

   The PeopleSoft HCM Installation Table - Products page appears, as shown in the following example:



PeopleSoft HCM Installation Table - Products: Installed Products page

2. On the Products page, in the Installed Products group box, verify that Pay/Bill Management and Project Costing are selected.

   If they are not selected then select them.

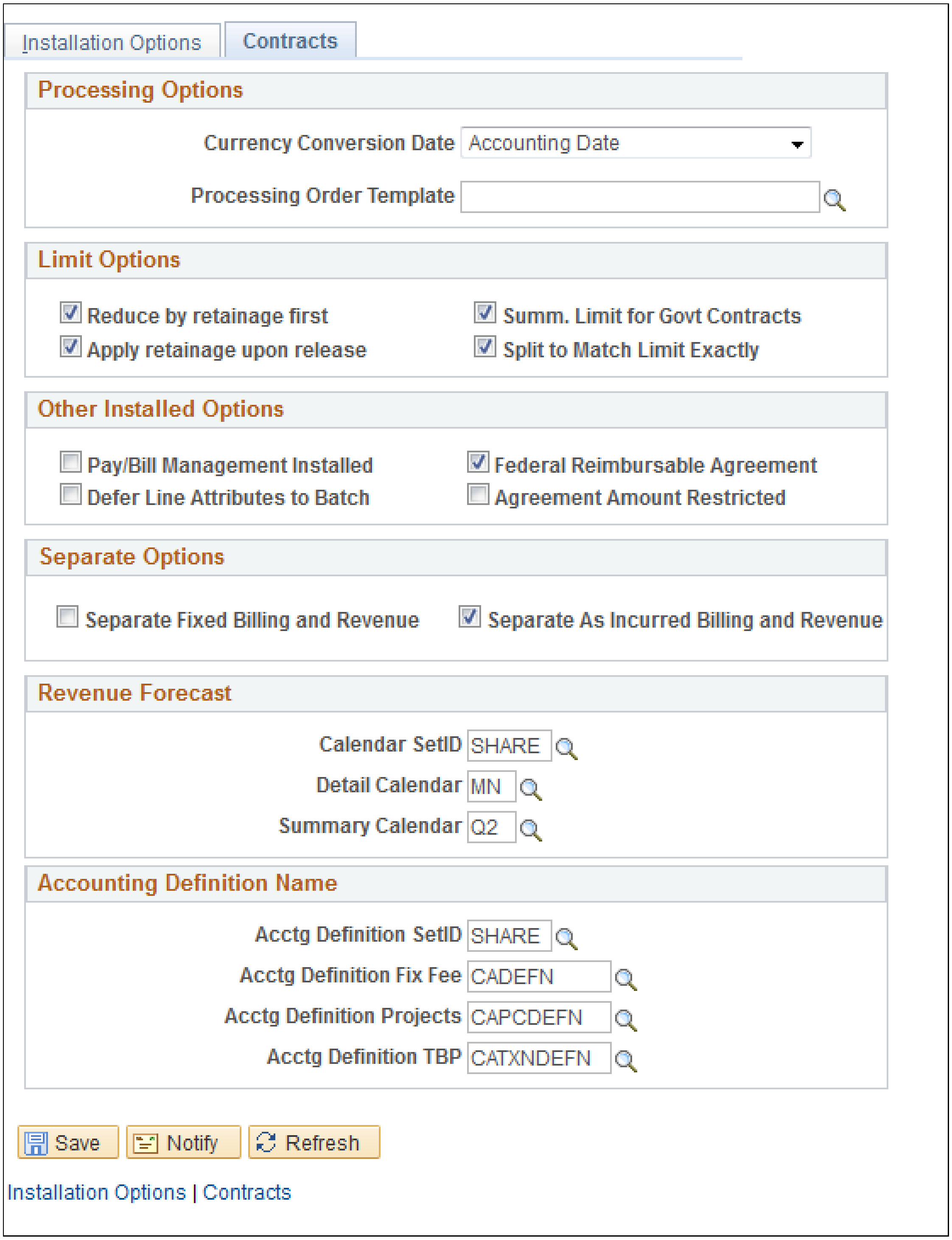
3. Click Save.

Task 9-2-2: Verifying the Installation Table for PeopleSoft FSCM

In this step, you verify the selection of the Pay/Bill Management for Contracts installation option in the Installation table.

1. In PeopleSoft FSCM, select Set Up Financials/Supply Chain, Install, Installation Options.

2. On the Installation Options page, click the Contracts link to access the Contracts page, as shown in the following example:



PeopleSoft FSCM Installation Options - Contracts page

3. On the Contracts page, verify that Pay/Bill Management Installed is selected.

   If it is not selected then select it.

4. Click Save.

Chapter 10

Installing PeopleSoft 9.2 ESA and FSCM Portal Packs

This chapter discusses:

- Granting Access to Navigation Pages
- Granting Access to Personalize the Portal Homepage
- Enabling Pagelet Creation and Access with Portal Utilities

Task 10-1: Granting Access to Navigation Pages

To access the navigation pages, you must grant all users security to the Navigation Page IScripts. Using PeopleSoft Data Mover, run the EOPP_ ADD_ROLE.DMS script that is in *PS_APP_HOME*\scripts.

Note. When you create a new user ID, you should add the EOPP_USER role to the new user ID.

Task 10-2: Granting Access to Personalize the Portal Homepage

To add, remove or change the layout of the homepage, you must grant the homepage personalization security access to all non-guest users.

To update the homepage personalization permission list, use PeopleSoft Data Mover to run the PORTAL_HP_PERS.DMS script.

To add the Portal User role to the user IDs, use PeopleSoft Data Mover to run the PORTAL_ADD_ROLE.DMS script. You can find both scripts in <PS_APP_HOME>\scripts.

Note. You should grant the PAPP_USER role to all new user IDs for access to the homepage personalization. After running this script, you should manually remove the role PAPP_USER from any GUEST User ID because the GUEST user should not be personalizing the common homepage.

Task 10-3: Enabling Pagelet Creation and Access with Portal Utilities

To enable pagelet creation and viewing using the Enterprise Components Portal Utilities, you can use PeopleSoft Data Mover to run the EOPP_PORTAL_PACK.DMS script in <PS_APP_HOME>\scripts.

Note. Only perform this task if you are licensed for PeopleSoft Financials Portal Pack or Enterprise Portal.

Chapter 11

Integrating PeopleSoft 9.2 Project Costing and Program Management with Microsoft Project 2007, 2010, or 2013

This chapter discusses:

- Understanding the PeopleSoft-Microsoft Project Integration
- Installing the PeopleSoft-Microsoft Project Integrator
- Configuring the PeopleSoft-Microsoft Project Integrator

Understanding the PeopleSoft-Microsoft Project Integration

The PeopleSoft-Microsoft Project Integrator is required if you are integrating PeopleSoft Project Costing or PeopleSoft Program Management with Microsoft Project 2007 (Microsoft Windows XP), Microsoft Project 2010, or Microsoft Project 2013. PeopleSoft-Microsoft Project Integrator must be installed and running on each file server that you plan to use as a point of integration.

Note. PeopleSoft-Microsoft Project Integrators must be installed on the machine that is configured with Microsoft Project 2007, Microsoft Project 2010, or Microsoft Project 2013. It is important that this machine is not used for any other purpose. The Integrator supports Windows Terminal Server which means that one machine can be used to run multiple Integrators.

Note. The supported browser for integrating PeopleSoft Project Costing with Microsoft Project is Internet Explorer (IE).

Task 11-1: Installing the PeopleSoft-Microsoft Project Integrator

To install the project integrator:

1. Create a directory, referred to here as *<MSP_HOME>*, for the PeopleSoft-Microsoft Project Integrator on the Microsoft Windows machine that you dedicate as the Microsoft Project Integrator.

   For example: C:\MSP\.

2. From your file server, copy the files in *<PS_APP_HOME>*/src/vb/msp to the *<MSP_HOME>* directory.

3. To register any missing ActiveX controls in the Microsoft Windows machine that you dedicate as the Microsoft Project Integrator, check the Windows system installation directory (referred to here as *<WINDOWS_INST>*), for example C:\WINNT\SYSTEM32 or C:\WINDOWS\SYSTEM32, for the following OCX files:

   - Richtx32.ocx

- TABCTL32.OCX
- MSINET.OCX

4. If any of these files are missing, do the following:
   a. Copy the three files from <*PS_APP_HOME*>/src/vb/msp to <*WINDOWS_INST*>.
   b. Copy the file regmsp.bat from <*PS_APP_HOME*>/src/vb/msp to <*WINDOWS_INST*>.
   c. Run <*WINDOWS_INST*>\regmsp.bat to register the OCXs.

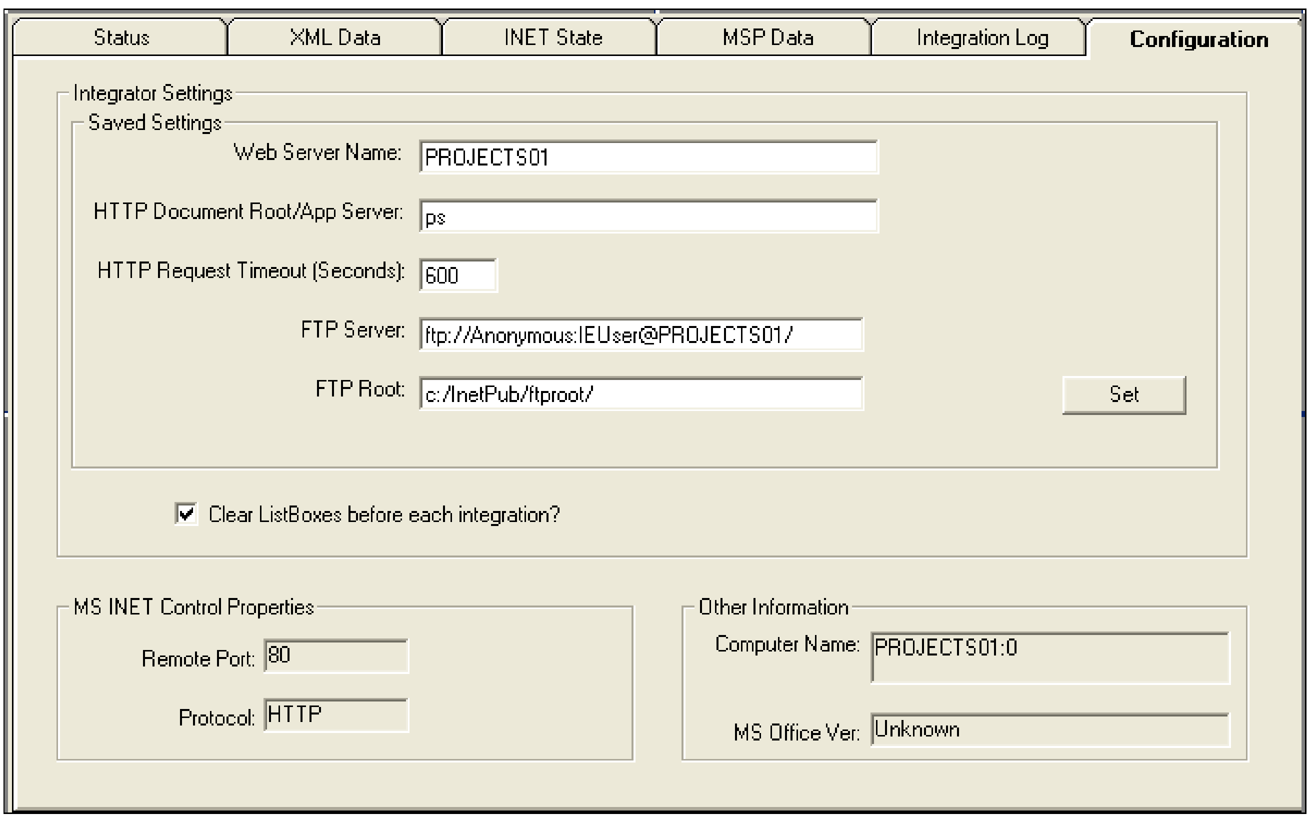
      For example:

      `C:\WINNT\system32\regmsp.bat.`

Task 11-2: Configuring the PeopleSoft-Microsoft Project Integrator

After the PeopleSoft-Microsoft Project Integrator begins running, you must configure it for your environment, as follows:

1. Launch <*MSP_HOME*>\PC_MSP2.EXE to start the Microsoft Project Integrator application.
2. Select the Configuration tab, as shown in the following example:



PeopleSoft-Microsoft Project Integrator - Configuration tab

3. Enter the following values:
   - In the Web Server Name field, enter the name of your web server.
   - In the HTTP Document Root/App Server field, enter the name of your application server.

To verify the Application Server name, launch your browser and log into PeopleSoft. View the URL address.

For example:

http://abc12345.us.oracle.com:4321/psp/e910p21x/?cmd=login

In the preceding example, *abc12345.us.oracle.com:4321* is entered as the Web Server Name and *e910p21x* is entered as the HTTP Document Root/App Server.

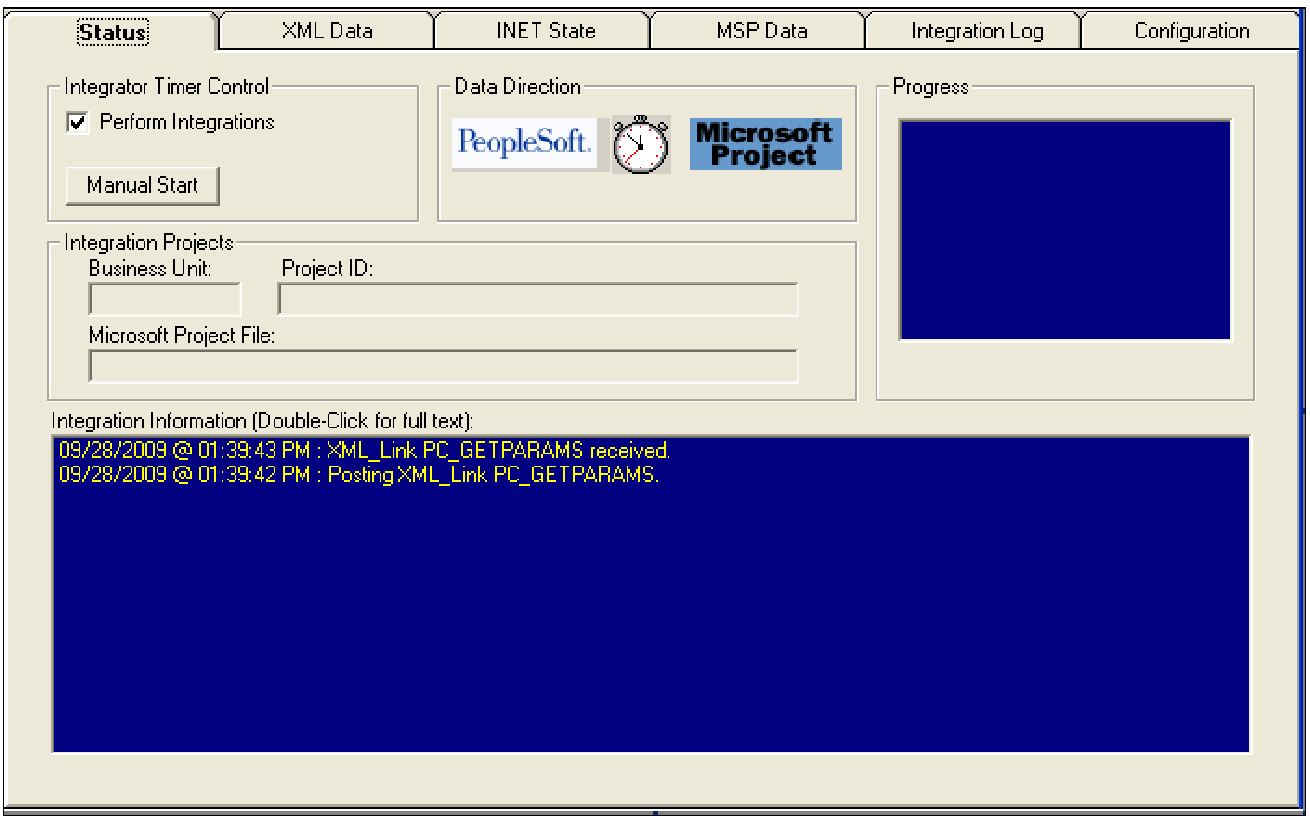
- In the FTP Server field, enter the FTP server that this integrator uses to direct the application server to send the .mpp files for integration.
- In the FTP Root field, enter the Windows file path to the root location of the FTP server. This is the file path that Microsoft Project uses to find the .mpp files to integrate.

4. You can verify that the Microsoft Project Integrator is running successfully when you see a message such as this:

   Example of Integration Information message when working properly:

```
01/07/2011@02:43:12PM:XML_Link PC_GETPARAMS received.
01/07/2011@02:43:12PM:PostingXML_Link PC_GETPARAMS.
```

   This example shows the message in the Integration Information section of the Status page:



Microsoft Project Integrator page: Status tab showing Integration Information message

If you receive the following error in the XML Data tab the first time that you run the integrator: *10.5.1 500 Internal Server Error. The server encountered an unexpected condition which prevented it from fulfilling the request.*

Do the following:

- Open a browser and run the following URL:

http://<WebServerName>/xmllink/<ApplicationServerName>/

For example: http://projects01.peoplesoft.com/xmllink/ps/

- Then run the integrator again.

To launch the project integrator upon start up, create a shortcut to PC_MSP2.EXE in the server's Startup folder to ensure it initiates upon start up.

Chapter 12

Defining an FTP Server for File Attachments in PeopleSoft 9.2 Project Costing

This chapter discusses:

- Understanding File Attachment Storage
- Setting Up File Attachment Storage on the Database
- Setting Up File Attachment Storage on a File Server

Understanding File Attachment Storage

This chapter details how to specify an FTP server for project and activity file attachments. You can store file attachments on the database or on a file server. You can then upload and download files by using the Attachments page that is available at both the project and activity levels in PeopleSoft Project Costing.

Task 12-1: Setting Up File Attachment Storage on the Database

To store file attachments on the database:

1. Select Set Up Financials/Supply Chain, Install, Installation Options, Project Costing.
2. On the Project Costing page, in the File Attachment Option section, select the Database option.
3. Click Save.

Note. PeopleSoft Project Costing delivers the PC_PROJECTS_DB_ATTACHMENT URL. No additional step is necessary to set up this method for file attachments.

Task 12-2: Setting Up File Attachment Storage on a File Server

To store file attachments on a file server:

1. Verify that your FTP server has adequate disk storage to store the project and activity documents.
2. Select PeopleTools, Utilities, Administration, URLs.
3. On the URLs search page, search for and select the URL *PC_PROJECTS_DOC_ATTACHMENT.*

   Note. PeopleSoft Project Costing delivers this URL.

   ---

4. On the URL Maintenance page, enter the URL path to the designated FTP server in the following format:

ftp://<userID>:<password>@<machinename>

Note. The user name and password that you specify here are critical. The system uses these to connect all users to the FTP attachment server.

- In the User ID field, enter the user ID of the user account under which all users connect to the FTP server to add, update, view and delete documents.
- In the Password field, enter the password that is associated with the user account under which all users connect to the FTP server.
- In the Machine Name field, enter the machine name by which you physically identify the FTP server on the network.

  If you create an optional directory for document storage on the server, include the directory name when you cite the path. You can also store attachments in the root directory of the FTP server.

5. Click Save.
6. On the Installation Options - Project Costing page, in the File Attachment Options section, select the *File Server* option and enter the home directory where you store the attachment files.
7. Click Save.

See the product documentation for PeopleTools: System and Server Administration, "Using PeopleTools Utilities," for more information on the PeopleSoft URL Maintenance page.

See the product documentation for PeopleSoft FSCM: Application Fundamentals, "Setting Installation Options for PeopleSoft Applications," for more information on the PeopleSoft Installation Options - Project Costing page.

Chapter 13

Setting Up PeopleSoft 9.2 Staffing Front Office

This chapter discusses:

- Setting Up Document Attachments
- Setting Up the PeopleSoft Search Framework
- Integrating Resume Parsing for PeopleSoft Staffing Front Office

Task 13-1: Setting Up Document Attachments

This section discusses:

- Understanding Document Attachments
- Setting Up the File Attachment Server

Understanding Document Attachments

PeopleSoft Staffing Front Office 9.2 uses the standard file attachments functionality. Many PeopleSoft products and components use this functionality.

Note. Oracle supports PeopleSoft Staffing Front Office only on Microsoft SQL Server, Oracle, and DB2 LUW.

If you are planning to use file attachments for Applicants, Employees, Orders, Assignments, Customers, or Contacts, then you need to set up a File Attachments server. PeopleSoft Staffing Front Office supports any of the following file attachment server types:

- FTP (file transfer protocol server)
- DB (database server)
- URL (universal resource locator server)

Task 13-1-1: Setting Up the File Attachment Server

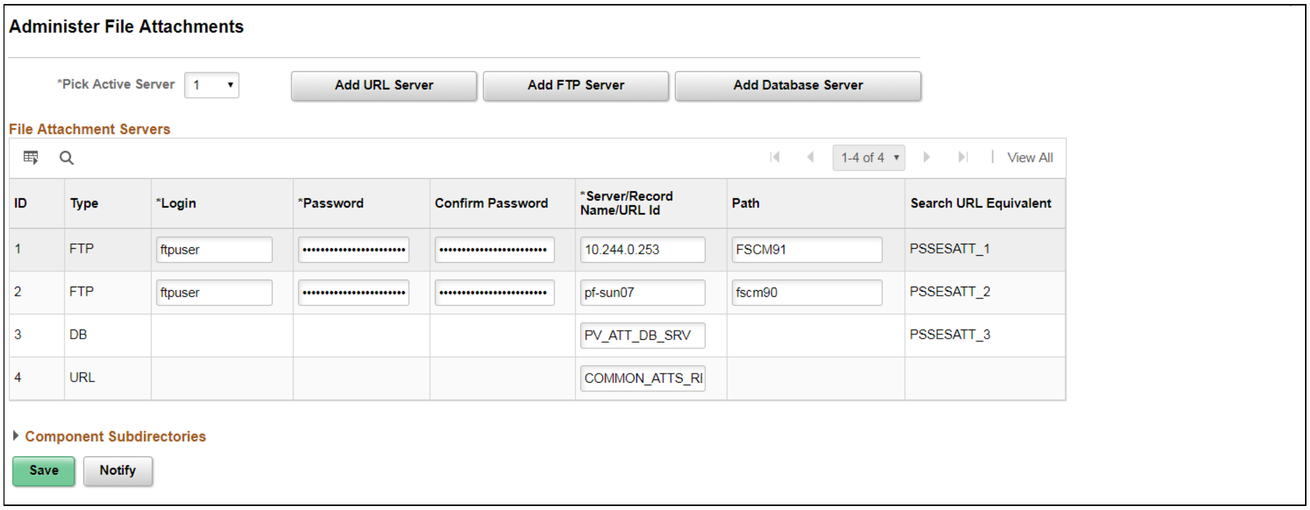
The system stores and retrieves Attachments to PeopleSoft Staffing Front Office Orders and Assignments from the server locations that you define on the Administer File Attachments page. System administrators can configure one or more servers to store attachments, set up new servers, and identify the active server. Administrators can add or modify the FTP root folder for FTP servers. These servers can be FTP, URLs, or Database servers. This section describes how to configure a Database server.

Note. If you want to configure an FTP or URL server, you can find more information for setting up File Attachments in FSCM architecture in *PeopleSoft FSCM: Application Fundamentals.*

To set up a file attachment server for PeopleSoft Staffing Front Office:

1. Select Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments.

   The Administer File Attachments page appears, as shown in this example:

   Administer File Attachments page

2. In the Pick Active Server drop-down list box, select the server ID of the active (or default) server where all newly created attachments are stored. This field is required.

   You can switch the active server at any time. All previously created attachments are still retrieved from the server where they were originally stored. The attachments keep a reference to the original server.

3. Click the Add Database Server button to insert a new row into the grid to define a new Database server for attachments.

   The new row includes the following:

   - The ID field displays the ID number that the system assigns for each server on this page.

     When an attachment is stored to the server, the server ID is inserted into the attachment record. When you request to download (view) this attachment, the system retrieves the attachment from the original server based on the server ID.

   - The Type field identifies the type of server based on whether you click the Add URL Server button, the Add FTP Server button, or the Add Database Server button.

     After you save the row and exit the component, you cannot change the server type.

4. In the Server/Record Name/URL Id field, accept the default record name, PV_ATT_DB_SRV.
5. Click Save.

   Note. You cannot delete a server after you save the page. After you exit the component, the system assumes that attachments could already be stored on this server location.

   Note. The Component Subdirectories group box and fields are *not* applicable for PeopleSoft Staffing Front Office attachments.

Task 13-2: Setting Up the PeopleSoft Search Framework

PeopleSoft Staffing Front Office 9.2 uses the PeopleSoft Search Framework to address its search needs. The search functionality is common between PeopleSoft Staffing and Resource Management.

You can deploy the Search Definitions in PeopleTools, Search Framework, Administration, Deploy/Delete Object.

See the product documentation for PeopleTools: PeopleSoft Search Technology, "Understanding PeopleSoft Search Framework," for more information about setting up PeopleSoft Search Framework.

Task 13-3: Integrating Resume Parsing for PeopleSoft Staffing Front Office

This section discusses:

- Understanding Resume Parsing for PeopleSoft Staffing Front Office
- Setting Up Staffing Installation Options for Resume Parsing
- Configuring the PeopleSoft Integration Broker
- Setting Up Mapping
- Assigning Mapping Setups
- Defining Mapping Values

Understanding Resume Parsing for PeopleSoft Staffing Front Office

Resume parsing strips resumes of their formatting, leaving behind the work history, skill set, education, and other data in a basic and consistent format. You can then load this extracted data into a database and the appropriate fields for searching and processing.

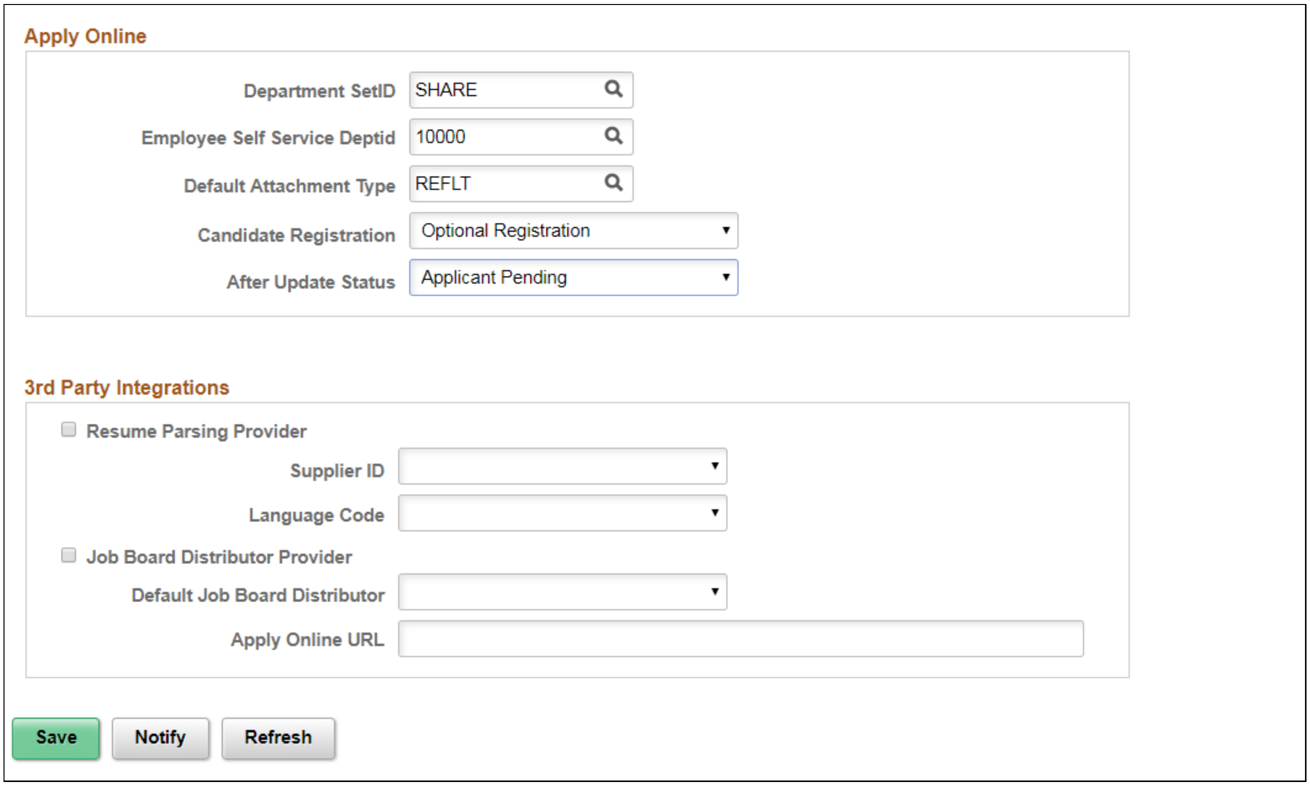
You can use PeopleSoft Staffing Front Office (SFO) to integrate with additional component (third-party) resume parsing software (which must be compliant with HR-XML Candidate standard) to retrieve the extracted data.

Task 13-3-1: Setting Up Staffing Installation Options for Resume Parsing

To set up PeopleSoft SFO installation options to use resume parsing:

1. Select Set Up Financials/Supply Chain, Install, Installation Options.

2. Select the Staffing tab to access the Staffing Installation page, as shown in the following example:

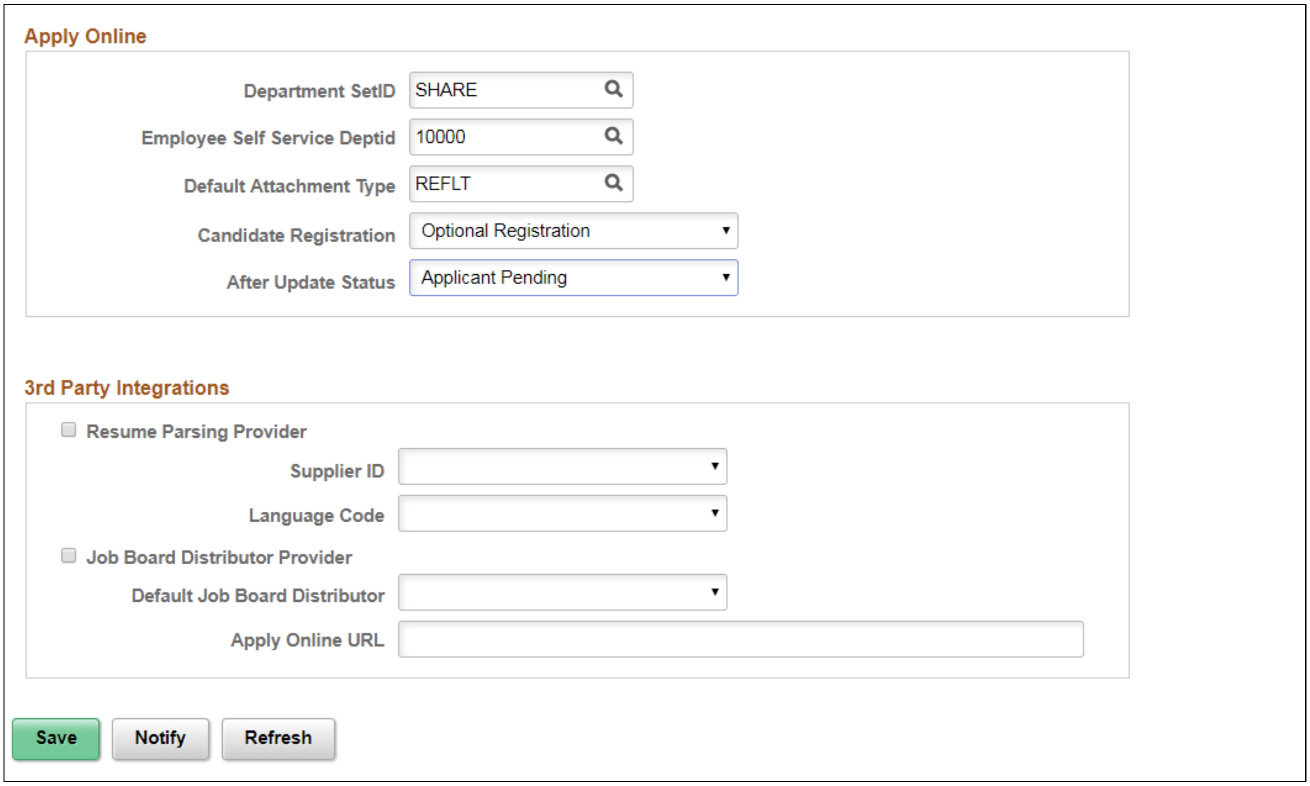


Installation Options - Staffing Installation page showing the PeopleSoft Domain

3. On the Staffing Installation page, in the PeopleSoft Domain field, enter or browse to select the PeopleSoft domain.

   For example: *PSFT*.

4. On the Staffing Installation page, in the 3rd Party Integrations group box, select the Resume Parsing Provider check box, as shown in the following example:



Installation Options - Staffing Installation page showing the Resume Parsing Provider

The remaining fields in this section vary, depending on the resume parsing provider that you select.

Note. After you complete your basic PeopleSoft FSCM 9.2 and PeopleSoft SFO installation, you can complete the remaining Staffing Installation options and fields on this page using the implementation instructions in the PeopleSoft 9.2 Staffing Front Office documentation.

Task 13-3-2: Configuring the PeopleSoft Integration Broker

This section discusses:

- (Optional) Adding the Proxy Settings
- Encrypting the Password for the secureKeystore

(Optional) Adding the Proxy Settings

Before adding the proxy settings, you must activate the local domain and set up integration gateways.

See the "Appendix: Applying Common Installation Instructions," Activating the Domain for instructions to activate the local domain.

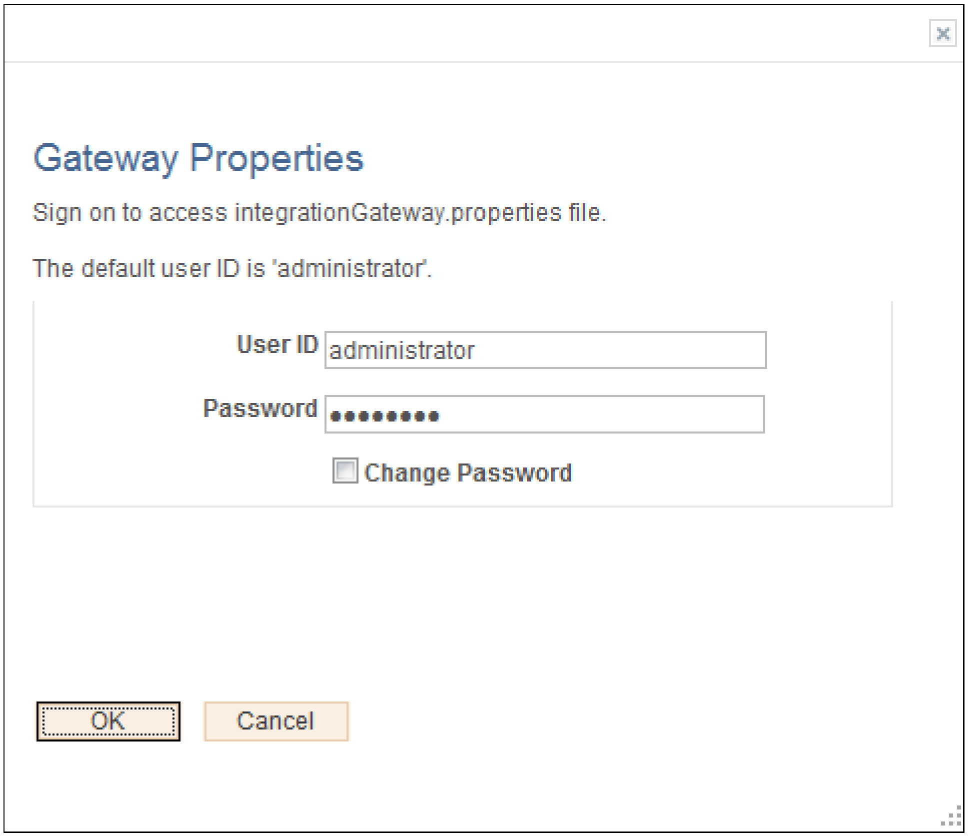
See the "Appendix: Applying Common Installation Instructions," Setting Up Integration Gateways for instructions to set up integration gateway.

If your environment is behind a proxy server, perform these steps to add the proxy settings to the gateway. Adding proxy settings is optional, based on your server configuration. If you have no proxy settings to add, you can skip these steps and proceed to the next task.

To add proxy settings to the gateway:

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Configuration, Gateways.
2. Click the Gateway Setup Properties link to access the Gateway Properties.

   The Gateway Properties signon page appears, as shown in the following example:

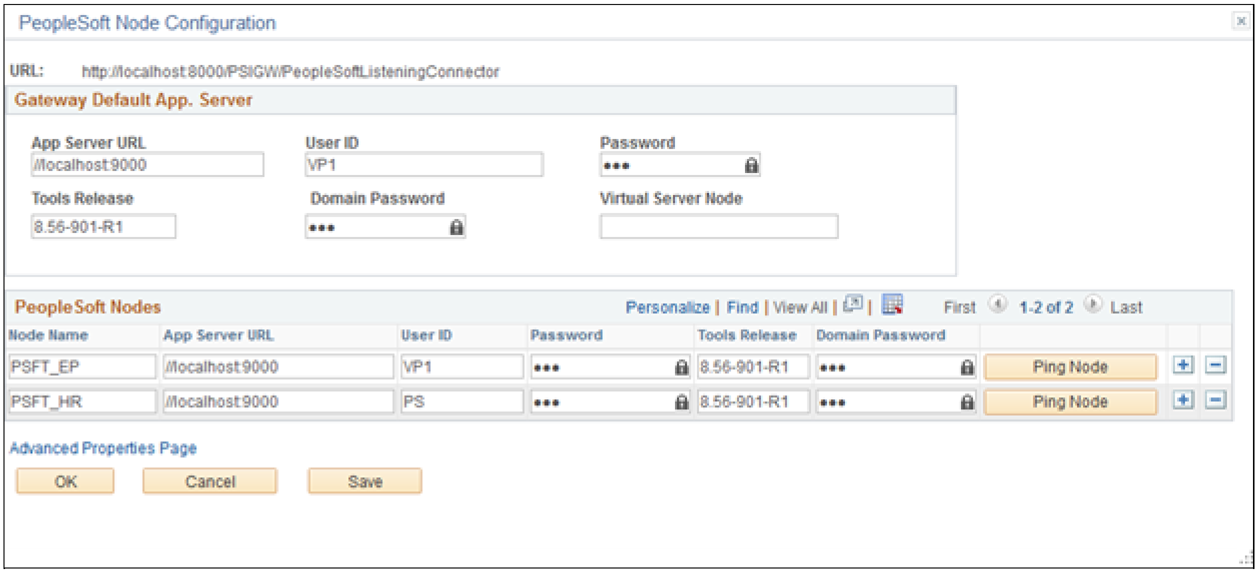
   Gateway Properties signon page

3. On the Gateway Properties signon page, enter the User ID, administrator in the preceding example, and Password for the Integration Gateway.

   If you do not know the User ID and Password of the Integration Gateway, contact your system administrator.

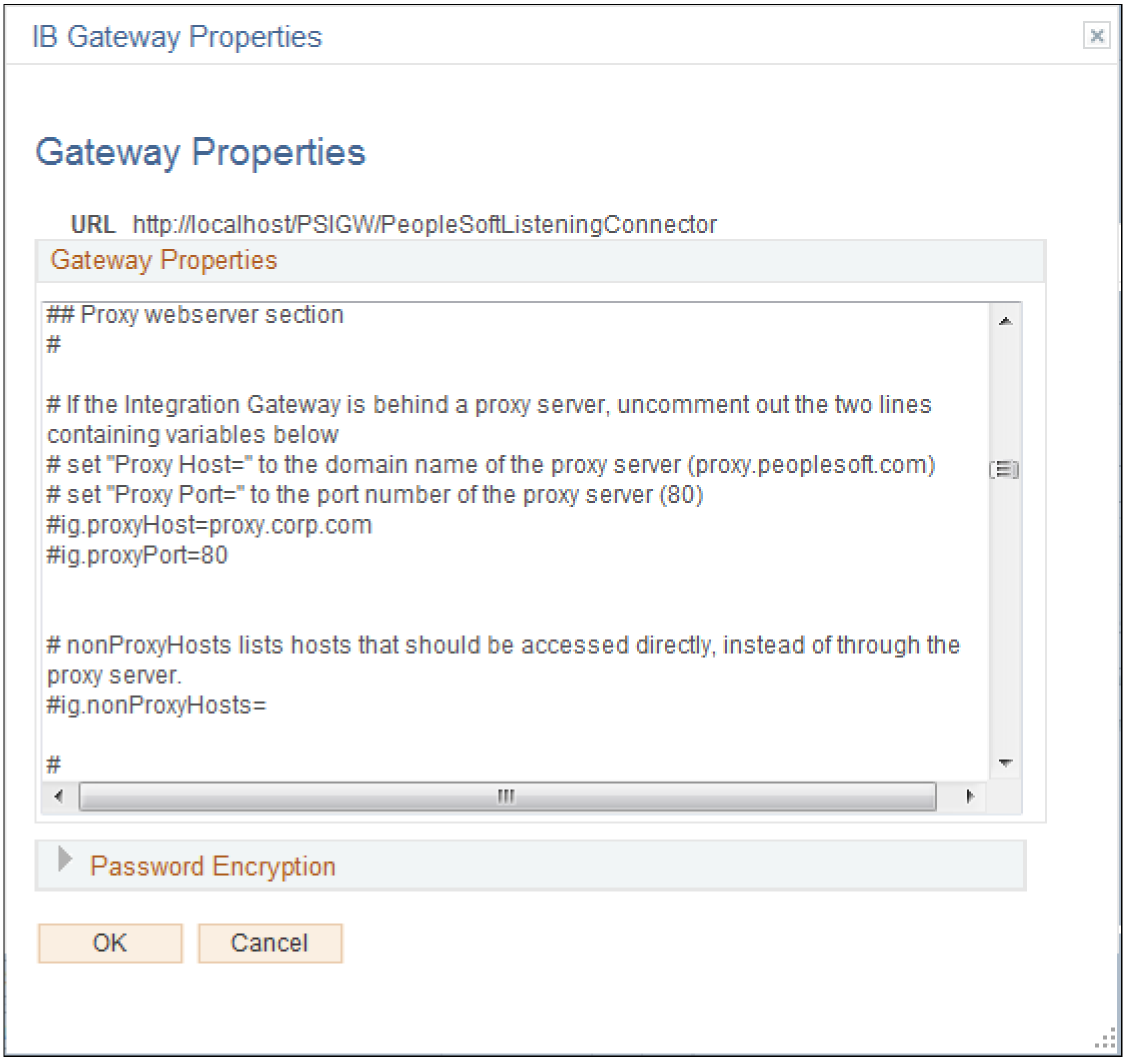
4. Click OK.

   The PeopleSoft Node Configuration page appears, as shown in the following example:



PeopleSoft Node Configuration page

5. On the PeopleSoft Node Configuration page, click the Advanced Properties Page link to access the Gateway Properties page, as shown in the following example:

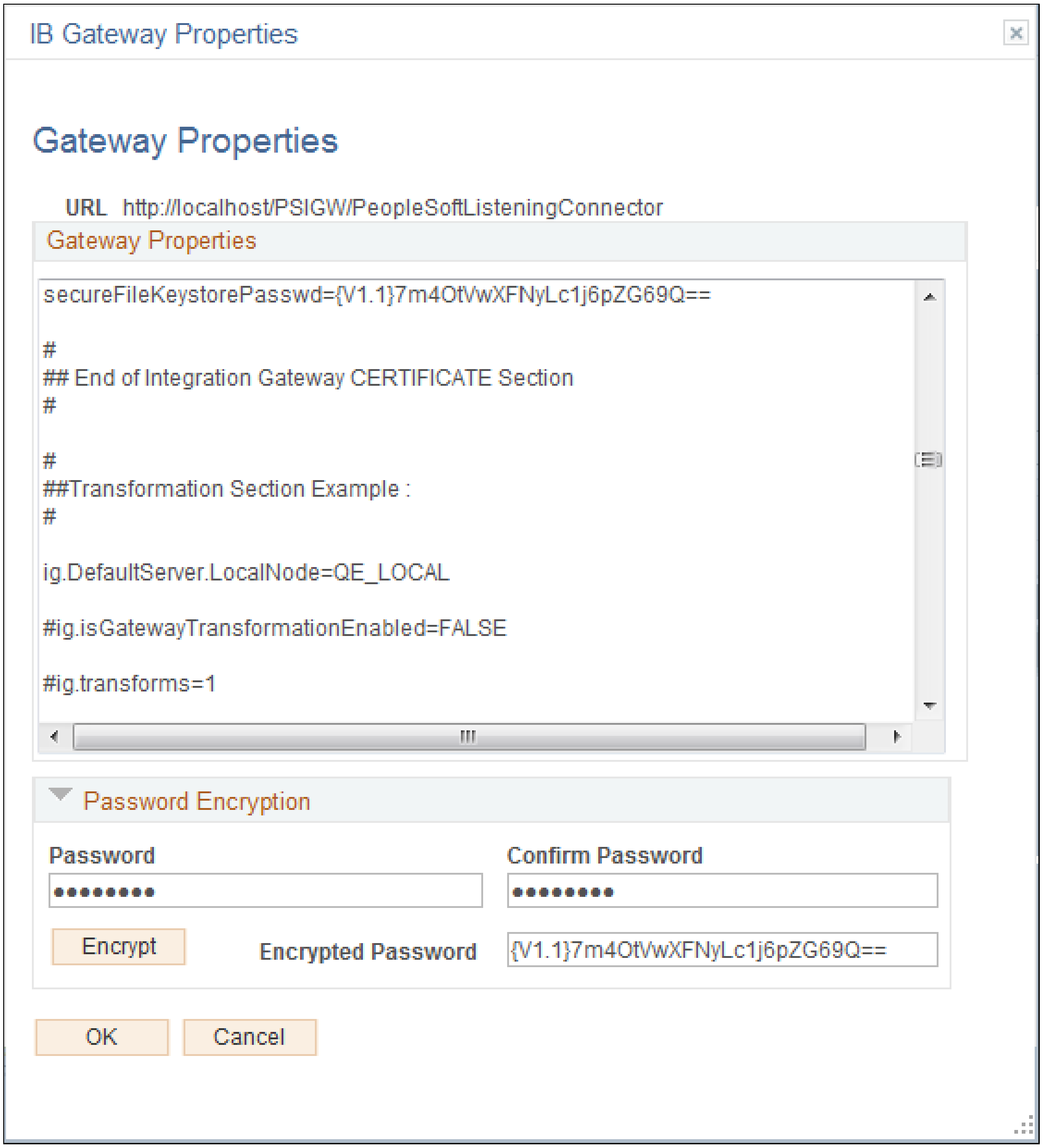


Gateways Properties page

Encrypting the Password for the secureKeystore

Use the Password Encryption Utility section to encrypt the password for the secureKeystore and then add that password to your Gateway properties.

1. On the Gateway Properties page, click the arrow to expand the Password Encryption section, as shown in the following example:



Gateway Properties page showing the Password Encryption utility

2. In the Password Encryption section, add the secure file keystore as follows:
   - In the Password field, enter *password*.
   - In the Confirm Password field, enter *password*.
   - Click the Encrypt button to encrypt the password.
3. After you encrypt the password, copy and paste it from the Encrypted Password field to the Gateway Properties (paste it after secureFileKeystorePasswd=).

   For example: `secureFileKeystorePasswd={V1.1}7m4OtVwXFNyLc1j6pZG69Q==`
4. Click OK.

Task 13-3-3: Setting Up Mapping

This section discusses:

- Understanding the Mapping Setup
- Configuring Static or Dynamic Mapping

Understanding the Mapping Setup

You must define the Mapping setup to map the PSFT record and field structure to the Partner field structure.

The two types of mapping are described as follows:

- Dynamic: Use for XREF tables that change occasionally (add/update/delete).

  Use to map fields to values that will change occasionally and will need more maintenance in the future (such as degree codes, major codes, and so on).

- Static: Use for system codes (such as gender) that change rarely but that contain a different set of values for use by candidates.

  Use to map fields (such as status fields, email type, and so on) whose values will change little in the future.

The following table lists several maps along with their type, elements, PSFT domain, and HRXML domain. You should create mappings for the items in the table according to the examples in the table for both mapping types:

Map Name	Type	Elements (Type and Length)	PSFT Domain (Uniqueness)*	HRXML Domain (Uniqueness)
PhoneTypeDVM	Static	PHONE_TYPE (String, 4) PHONE_TP (String, 20)	PHONE_TYPE (Unique)	PHONE_TP (Unique)
CountryCodeXREF	Dynamic	COUNTRY (String, 3) COUNTRCODE (String, 3)	COUNTRY (Unique)	COUNTRYCODE (Unique)
EmailTypeDVM	Static	E_ADDR_TYPE (String, 4) EMAIL_TP (String, 20)	E_ADDR_TYPE (Unique)	EMAIL_TP (Unique)
CompetencyXREF	Dynamic	COMPETENCY (String, 8) COMPETENCY_CODE (String, 50)	COMPETENCY (Unique)	COMPETENCY_CODE (Unique)
DegreeXREF	Dynamic	ACCOMPLISHMENT (String, 8) DEGREE (String, 50)	ACCOMPLISHMENT (Unique)	DEGREE (Unique)

Map Name	Type	Elements (Type and Length)	PSFT Domain (Uniqueness)*	HRXML Domain (Uniqueness)
LanguageXREF	Dynamic	ACCOMPLISHMENT (String, 8) LANGUAGE (String, 3)	ACCOMPLISHMENT (Unique)	LANGUAGE (Unique)
LicenseXREF	Dynamic	ACCOMPLISHMENT (String, 8) LICENSE (String, 50)	ACCOMPLISHMENT (Unique)	LICENSE (Unique)
MajorXREF	Dynamic	MAJOR_CODE (String, 10) MAJOR (String, 50)	MAJOR_CODE (Unique)	MAJOR (Unique)
MembershipXREF	Dynamic	ACCOMPLISHMENT (String, 8) MEMBERSHIP (String, 50)	ACCOMPLISHMENT (Unique)	MEMBERSHIP (Unique)
SchoolXREF	Dynamic	COUNTRY (String, 3) SCHOOL_CODE (String, 10) COUNTRY_CODE (String, 3) SCHOOL (String, 50)	COUNTRY SCHOOL_CODE (Unique)	COUNTRY_CODE SCHOOL (Unique)
StateCodeXREF	Dynamic	COUNTRY (String, 3) STATE (String, 6) COUNTRYCODE (String, 3) STATECODE (String, 6)	COUNTRY STATE (Unique)	COUNTRYCODE STATECODE (Unique)

Note. * PSFT Domain Uniqueness is a suggested parameter. Depending on the Resume Parsing Provider, it should be *Non Unique.*

Configuring Static or Dynamic Mapping

You can use the preceding table and content, along with these general configuration steps and the static and dynamic mapping examples that follow, to assist you in defining your mapping setup.

To configure either static or dynamic mapping:

1. Select Enterprise Components, Integration Definitions, Transformation Framework, Define Value Maps.
2. Search and select a map.
3. On the Elements page, specify the field names, types, and lengths for all of the domains.

The field name, Data Type, and length must match the system specifications for each domain.

For example, under the PSFT domain, the field name, type, and length must exactly match the record that you used as the information source.

In the preceding table, the field name, type, and length under PSFT Domain came from the actual system. However, the field name, type, and length under HRXML Domain is sample data that can vary from supplier to supplier.

Note. The mappings in the preceding table are available to use but are *optional.* If you map just a few, the Resume Parsing process works without errors, but only for the fields that you mapped.

---

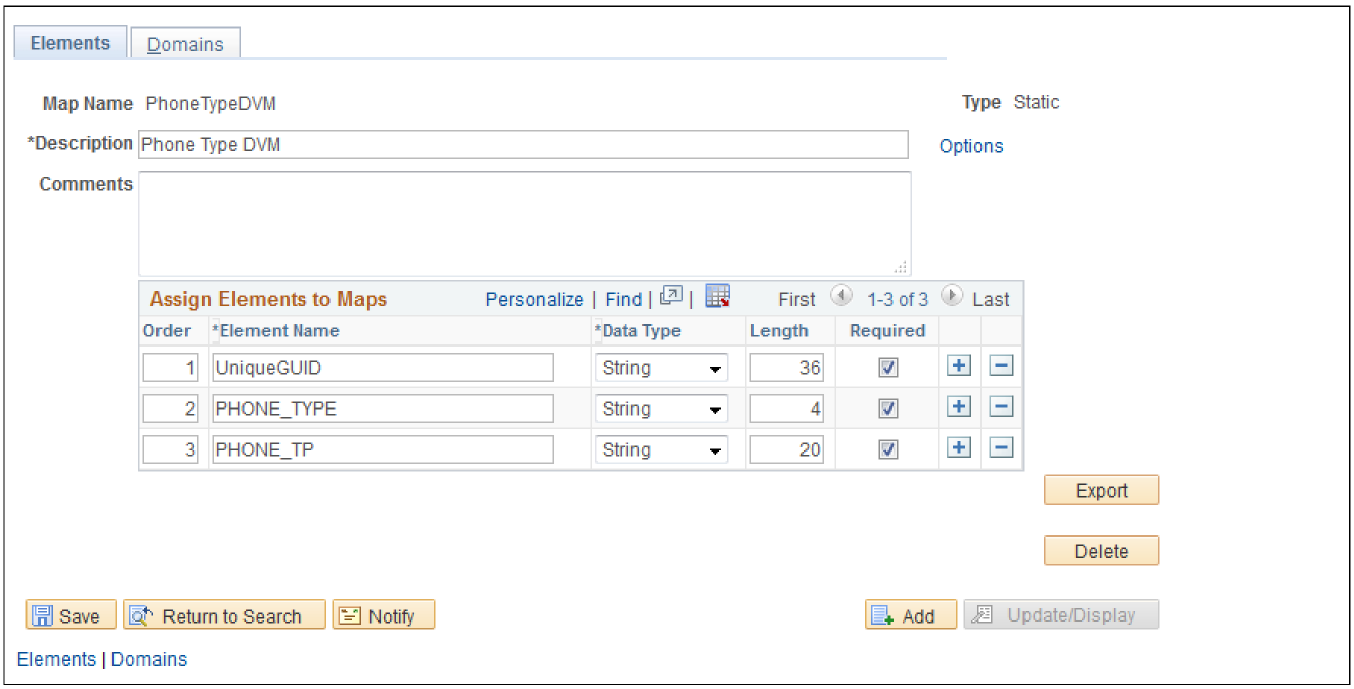
4. On the Domains page, select the corresponding field under each domain.

Note. You must name at least two parties as domains: one for the PeopleSoft system and the others for the additional component (third-party) systems.

---

5. Repeat these steps for each map.

The following example shows a Static Map of the Elements page:



Example of a Static Map - Elements page

The preceding Static Map example of the Elements page contains the following fields and example values:

- Map Name: *PhoneTypeDVM*
- Description: Enter a description for this map name.

  For example: *Phone Type DVM.*
- Comments: For example, *Phone Type DVM.*

  The Assign Elements to Maps group box contains the following fields and example values:
- Order: Enter the sequence order.

  For example: *1.*

- Element Name: Enter the name of the element.

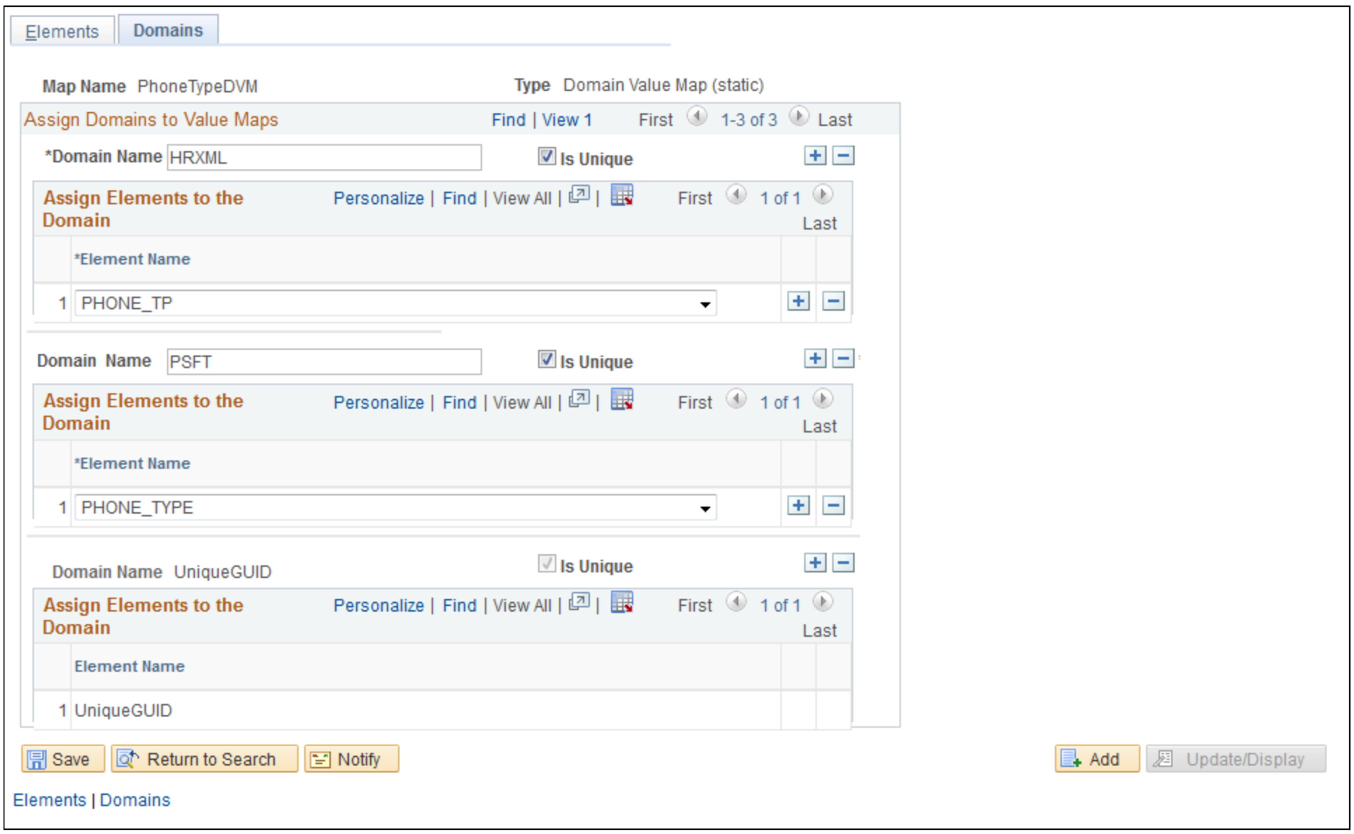
  For example: *UniqueGUID.*
- Data Type: Select a data type from the drop-down list box.

  For example: *String.*
- Length: Enter the character length.

  For example: *36.*
- Required: Select or deselect the check box.

  This example shows the Required check box selected.
- Add (+)/Delete (–) buttons to add to or remove from the preceding line of values in the Assign Elements to Maps group box.

The following example shows a Static Map of the Domains page:



Example of a Static Map - Domains page

The preceding Static Map example of the Domains page contains the following fields and example values:

- Map Name: *PhoneTypeDVM*
- Type: *Domain Value Map (static)*

  The Assign Domains to Value Maps group box contains the following fields and example values:
- Domain Name: Enter the name of the domain.

  For example: *HRXML.*
- Is Unique: Select or deselect this check box.

  This example shows the Is Unique check box selected.

- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Domains to Value Maps group box.

  The Assign Elements to the Domain group box contains the following fields and example values:
- Element Name: Select an element name from the drop-down list box.

  For example: *PHONE_TP*.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.
- Domain Name: Enter the name of the domain.

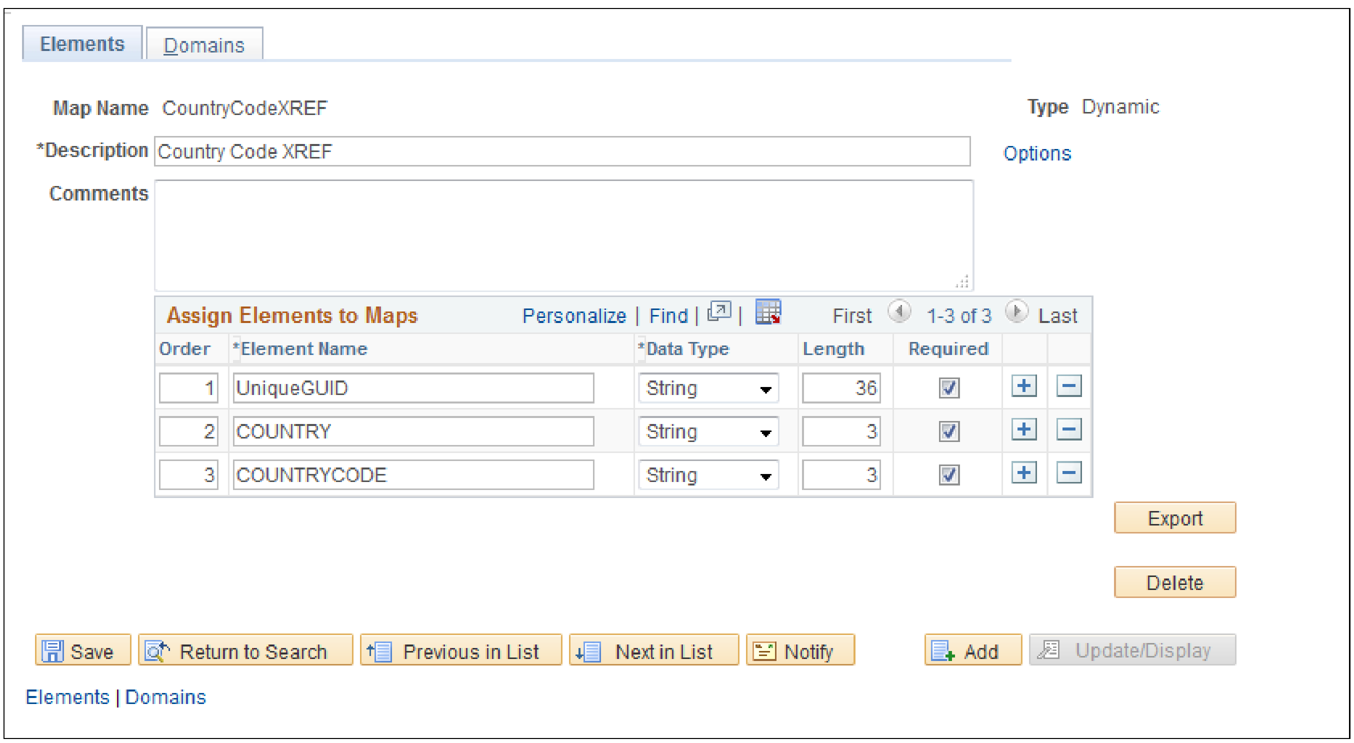
  For example: *PSFT*.
- Is Unique: Select or deselect this check box.

  This example shows the Is Unique check box selected.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.

  The Assign Elements to the Domain group box contains the following fields and example values:
- Element Name: Select an element name from the drop-down list box.

  For example: *PHONE_TYPE*.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.

The following example shows a Dynamic Map of the Elements page:



Example of a Dynamic Map - Elements page

The preceding Dynamic Map example of the Elements page contains the following fields and example values:

- Map Name: *CountryCodeXREF*

- Type: *Dynamic*
- Description: Enter a description for this map name.

  For example: *COUNTRYXREF.*
- Comments: *COUNTRYXREF*

  The Assign Elements to Maps group box contains the following fields and example values:
- Order Enter the sequence order.

  For example: *1.*
- Element Name: Enter the name of the element.

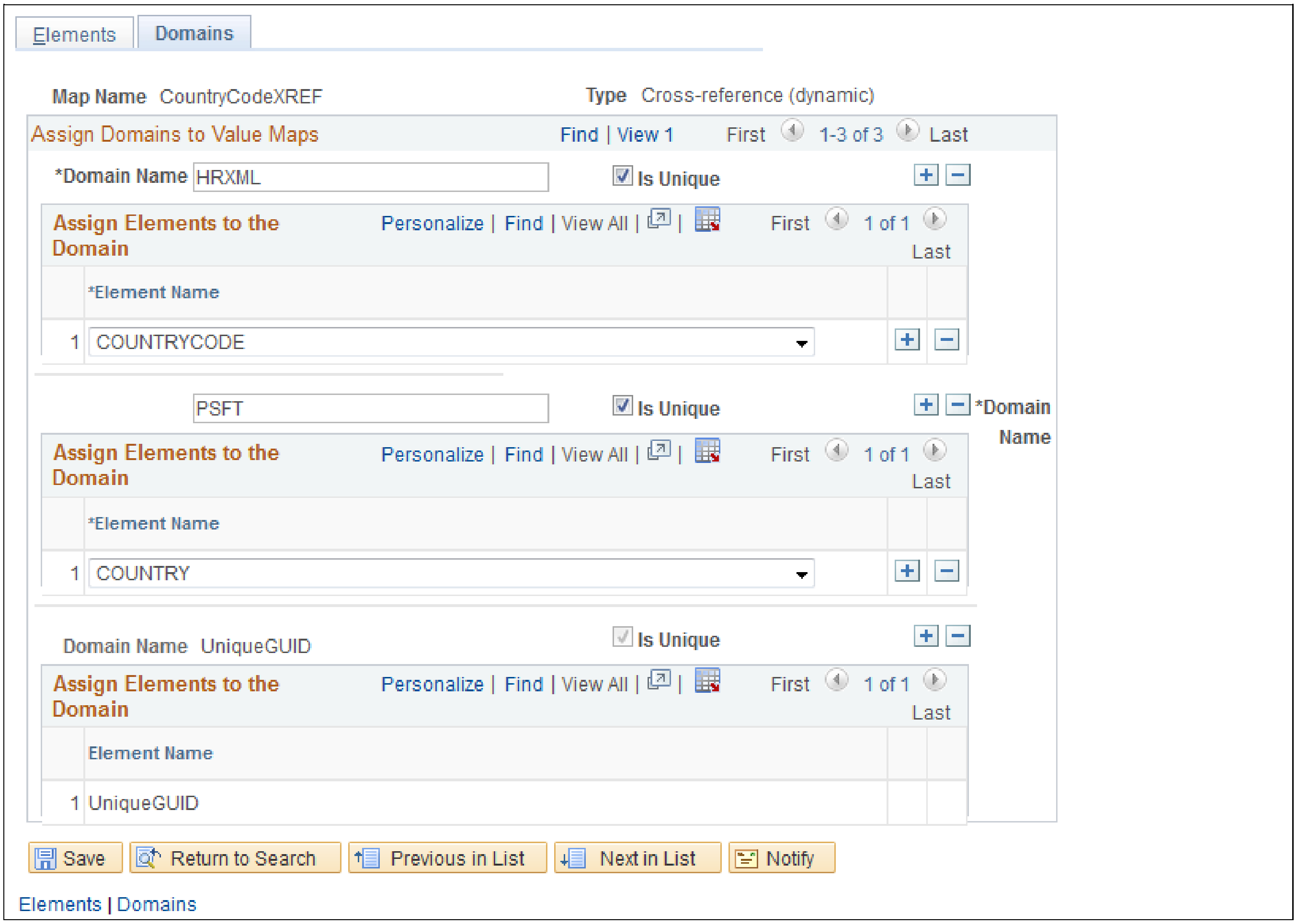
  For example: *UniqueGUID.*
- Data Type: Select from the drop-down list box.

  For example: *String.*
- Length: Enter the character length.

  For example: *36.*
- Required—select/clear the check box.

  This example shows the Required check box selected.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to Maps group box.

The following example shows a Dynamic Map of the Domains page:



Example of a Dynamic Map - Domains page

The preceding Dynamic Map example of the Domains page contains the following fields and example values:

- Map Name: *CountryCodeXREF*
- Type: *Cross-reference (dynamic)*

  The Assign Domains to Value Maps group box contains the following fields and example values:
- Domain Name: Enter the name of the domain.

  For example: *HRXML.*
- Is Unique: Select or deselect this check box.

  This example shows the Is Unique check box selected.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Domains to Value Maps group box.

  The Assign Elements to the Domain group box contains the following fields and example values:
- Element Name: Select an element name from the drop-down list box.

  For example: *COUNTRYCODE.*
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.

- Domain Name: Enter the name of the domain.

  For example: *PSFT*.
- Is Unique: Select/clear check box.

  This example shows the Is Unique check box selected.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.

  The Assign Elements to the Domain group box contains the following fields and example values:
- Element Name: Select an element name from the drop-down list box.

  For example: *COUNTRY*.
- Add (+)/Delete (–) buttons to add to or remove from the values in the preceding Assign Elements to the Domain group box.

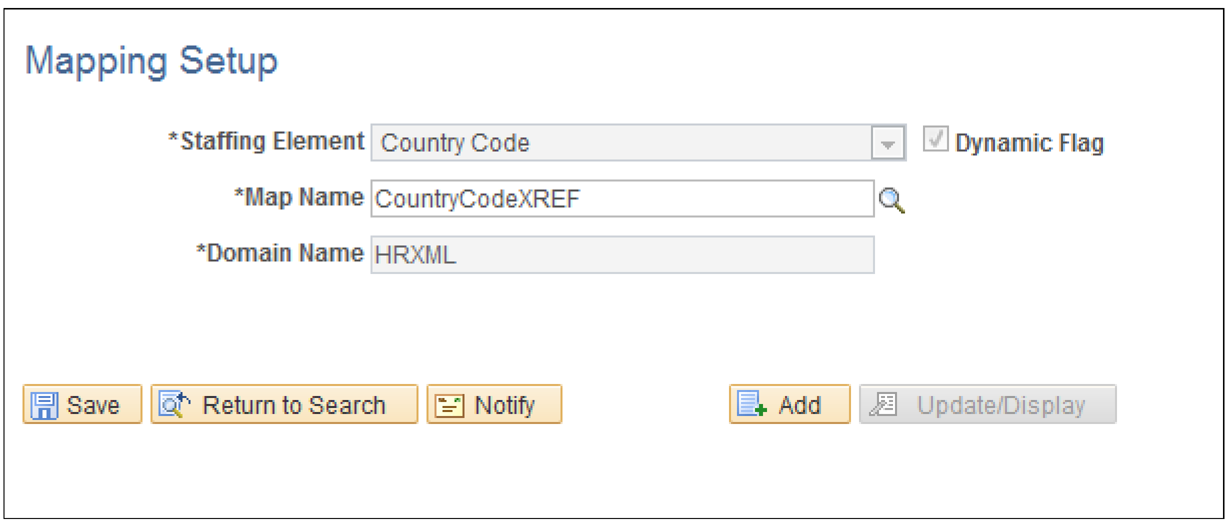
Task 13-3-4: Assigning Mapping Setups

To assign mapping setups for all of the maps that you want PeopleSoft Staffing to use:

1. Select Set Up Financials/Supply Chain, Product Related, Staffing, Integration Suppliers, Mapping Setup.

   The Mapping Setup page appears.

   Search and select the values required in the Mapping Setup page, as shown in the following example:

   Mapping Setup page

2. On the Mapping Setup page, in the Staffing Element field, select a staffing element from the drop-down list box.

   For example: *Country Code*.

   The staffing element is system data.
3. In the Map Name field, click the lookup button to search for and select the map name that you want to use.

   For example: *CountryCodeXREF*.

   In previous setup steps, you created the available map names.
4. In the Domain Name field, click the lookup button to search for and select the domain that you want to use.

   For example: *HRXML*.

In previous setup steps, you created the available domain names.

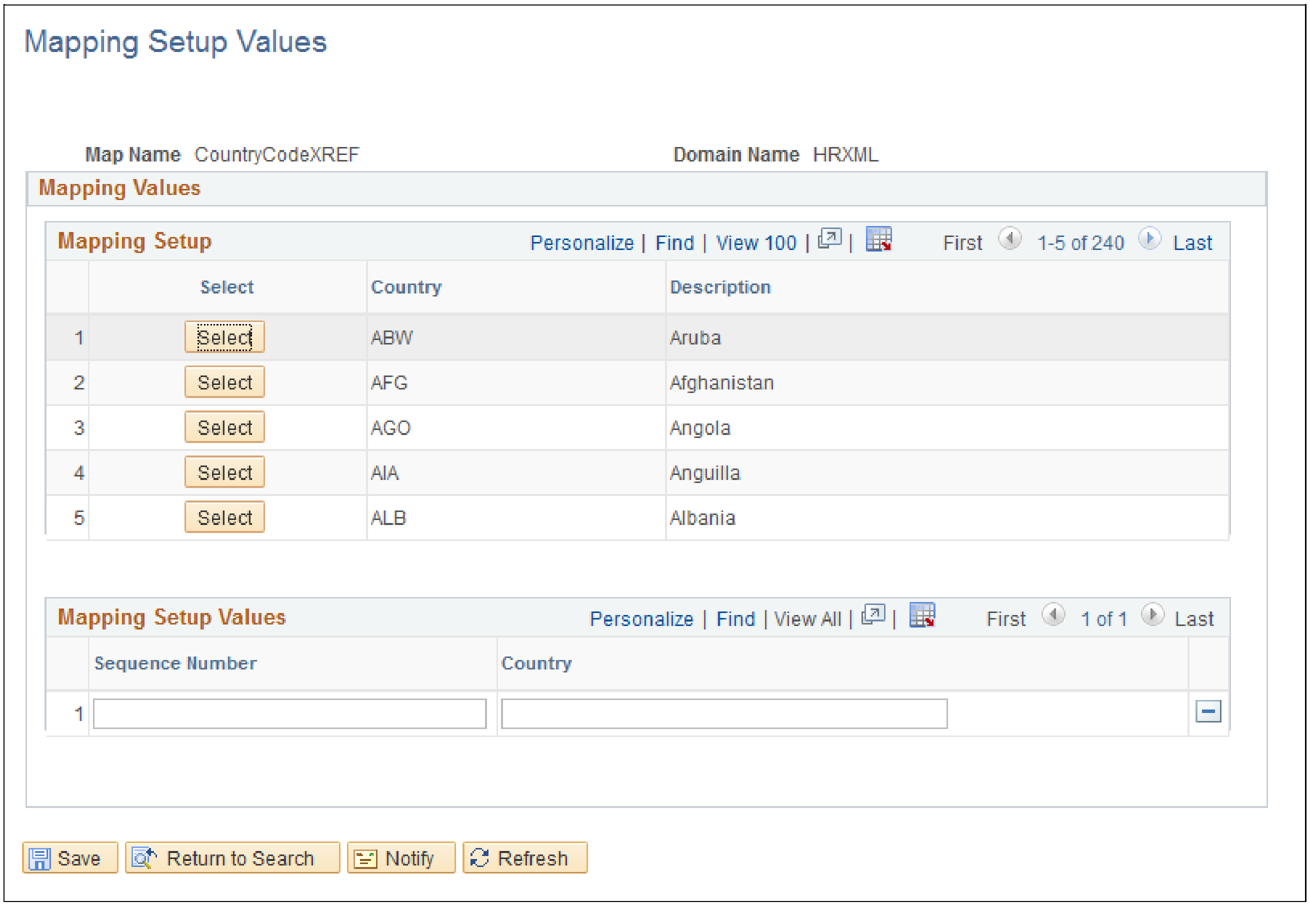
5. Click Save.
6. Repeat the preceding steps to assign mapping setups for all of the maps that you want PeopleSoft Staffing to use.

Task 13-3-5: Defining Mapping Values

To define the corresponding values for all of the maps that you want PeopleSoft Staffing to use.

1. Select Set Up Financials/Supply Chain, Product Related, Staffing, Integration Suppliers, Mapping Values.

   The Mapping Setup Values page appears, as shown in the following example:



Mapping Setup Values page

2. On the Mapping Setup Values page, in the Mapping Setup group box, click the Select button next to each mapping setup to define the mapping values.

   The Mapping Setup Values group box allows editing of the sequence number and country for the mapping setups that you select.
3. Edit the sequence and country.
4. Click Save.
5. Repeat the preceding steps to define mapping values for all of the maps that you want PeopleSoft Staffing to use.

Note. Before you can use the Resume Parsing feature, you must define the supplier at Set Up Financials/Supply Chain, Product Related, Staffing, Integration Suppliers, Supplier Integration Setup.

See the product documentation for PeopleSoft FSCM: Staffing Front Office for additional information on installation options, supplier setup, and mapping configuration.

Chapter 14

Integrating PeopleSoft Transaction Billing Processor with PeopleSoft Customer Relationship Management

This chapter discusses:

- Understanding PeopleSoft Transaction Billing Processor and PeopleSoft Customer Relationship Management Integration
- Activating the Integration Queues
- Activating the Integration Services and Routings
- Transforming the Contract Transaction Service

Understanding PeopleSoft Transaction Billing Processor and PeopleSoft Customer Relationship Management Integration

The following instructions detail the process to integrate PeopleSoft 9.2 Transaction Billing Processor (TBP) with the PeopleSoft 9.2 Customer Relationship Management (CRM) database. PeopleSoft Lease Administration (LA) also uses PeopleSoft TBP functionality; however, because it is in the same database, LA does not require any additional setup.

Only perform the following tasks if you want to integrate your PeopleSoft FSCM and PeopleSoft CRM databases.

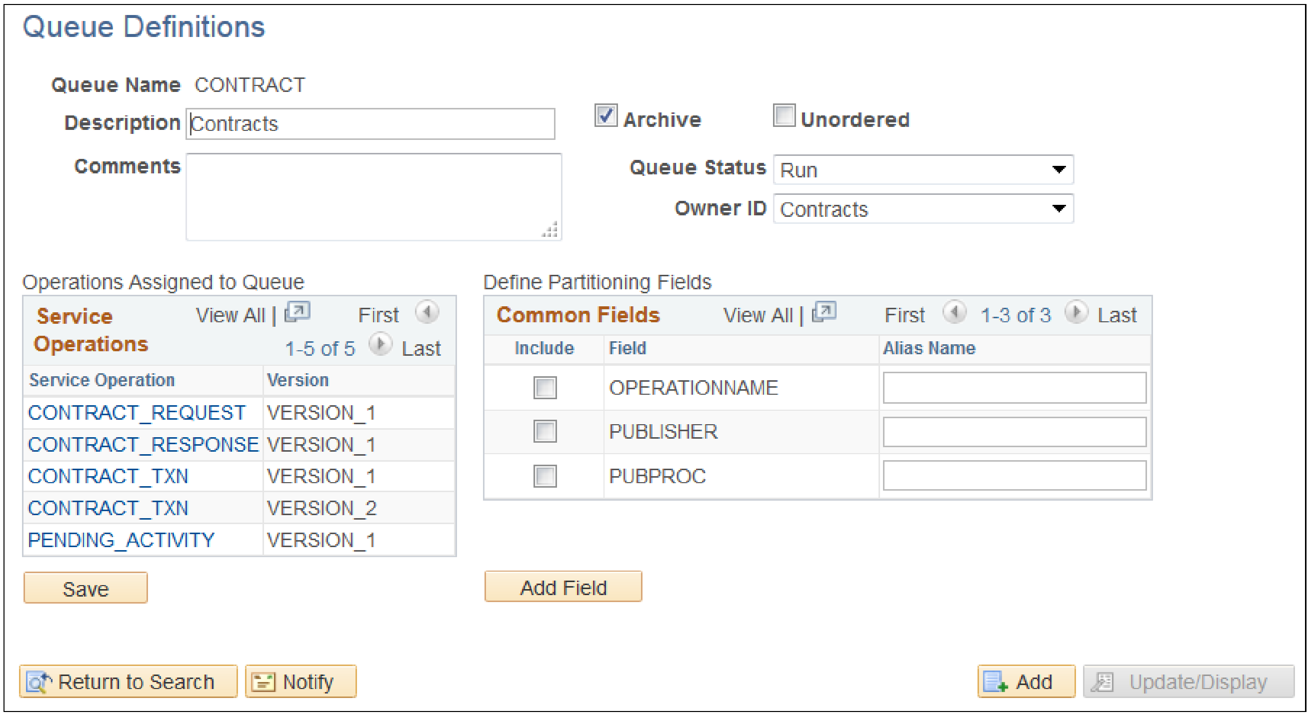
Task 14-1: Activating the Integration Queues

To turn on the integration queues (channels):

1. Sign in to PeopleSoft Pure Internet Architecture (PIA).
2. Select PeopleTools, Integration Broker, Integration Setup, Queues.

3. On the Queues search page, search for and select the queue name *CONTRACT*.

   The Queue Definitions page appears, as shown in the following example:



Queue Definitions page

4. On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
5. Click Save.

Task 14-2: Activating the Integration Services and Routings

This section discusses:

- Understanding Integration Service and Routing Activation
- Understanding New Routing Definition Creation
- Activating the Integration Services and Configuring the Routing Definition

Understanding Integration Service and Routing Activation

You must activate the following four services:

- CONTRACT_REQUEST (Asynchronous)
- CONTRACT_RESPONSE (Asynchronous)
- CONTRACT_TXN (VERSION_2) (Asynchronous)
- PENDING_ACTIVITY (Synchronous)

The PeopleSoft system delivers routings for each of these service operations. For example, the PeopleSoft system delivers a routing named CONTRACT_REQUEST for the service operation CONTRACT_REQUEST, with the default Sender node as PSFT_CR and the default Receiver node as PSFT_EP.

However, sender and receiver nodes are *only* editable when you are creating the new routing. After you create and save the routing, you cannot modify the sender and receiver nodes.

Therefore, you may need to create new routings to edit your sender and receiver nodes. You can create multiple routing instances with different names for the same service operation. In the example case in the steps that follow, CONTRACT_REQUEST is one instance and CONTRACT_REQUEST1 is another instance.

Because the routings that the PeopleSoft system delivers are already created and the nodes are no longer editable, you must configure your nodes. Use one of the following three methods described here:

- Configure the nodes PSFT_CR and PSFT_EP with the valid databases so that the Sender node PSFT_CR and Receiver node PSFT_EP are valid and functional.
- Delete the routing (CONTRACT_REQUEST) that the PeopleSoft system supplies and then create a new instance of the service operation.
- Create a *new* routing instance of the service operation with a different name (CONTRACT_REQUEST1 as shown in the steps that follow) and then supply the proper sender and receiver nodes (a prerequisite).

Note. Creating a new routing instance of the service operation with a different name is the method that is detailed in the steps that follow. If you use one of the other methods, verify that the correct routings are active by selecting PeopleTools, Integration Broker, Integration Setup, Services. Open each service operation and select the Routings tab to verify its status.

Understanding New Routing Definition Creation

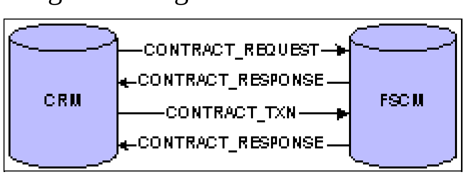
Use the information in this section to help you determine how to configure the new routing definition in the following section. Activating the Integration Services and Configuring the Routing Definition.

As a prerequisite, you must know which databases you are integrating. In the example of CONTRACT_REQUEST, the sender node will be the PeopleSoft CRM database and the receiver node will be the PeopleSoft FSCM database. The receiver node is always the target database. In the case of CONTRACT_RESPONSE, the receiver node is the PeopleSoft CRM database.

The service operations (messages) flow is as follows:

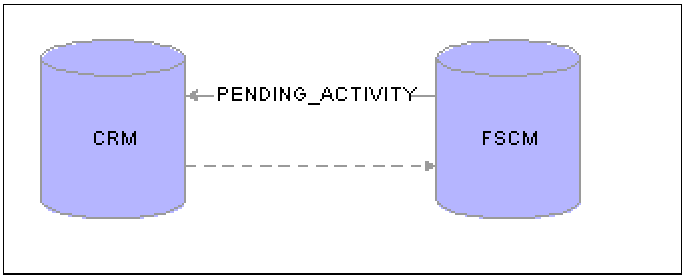
1. PeopleSoft CRM sends CONTRACT_REQUEST to PeopleSoft FSCM.
2. PeopleSoft FSCM sends CONTRACT_RESPONSE to PeopleSoft CRM.

   For Recurring and One-Time transactions, this message is sent only once. For On-Demand Transactions, the system sends this message for a second time, after the Contracts Billing Interface (CA_BI_INTFC) process completes, to provide the status of the transactions to PeopleSoft CRM.
3. PeopleSoft CRM sends CONTRACT_TXN to PeopleSoft FSCM, as shown in the following database integration diagram:



Database Integration diagram

4. The PENDING_ACTIVITY service operation is sent from PeopleSoft FSCM to PeopleSoft CRM, where the system is configured for synchronous messages, as shown in the following pending activity diagram:



Pending Activity diagram

5. The message identifies whether any pending activities exist for a contract Revenue Plan or Billing Plan. When the status of a Billing Plan or Revenue Plan changes to Complete, the system triggers the message.

Note. If the node fields are grayed out and unavailable for edit, you can create a new routing and configure that routing with the nodes that you are configuring.

Task 14-2-1: Activating the Integration Services and Configuring the Routing Definition

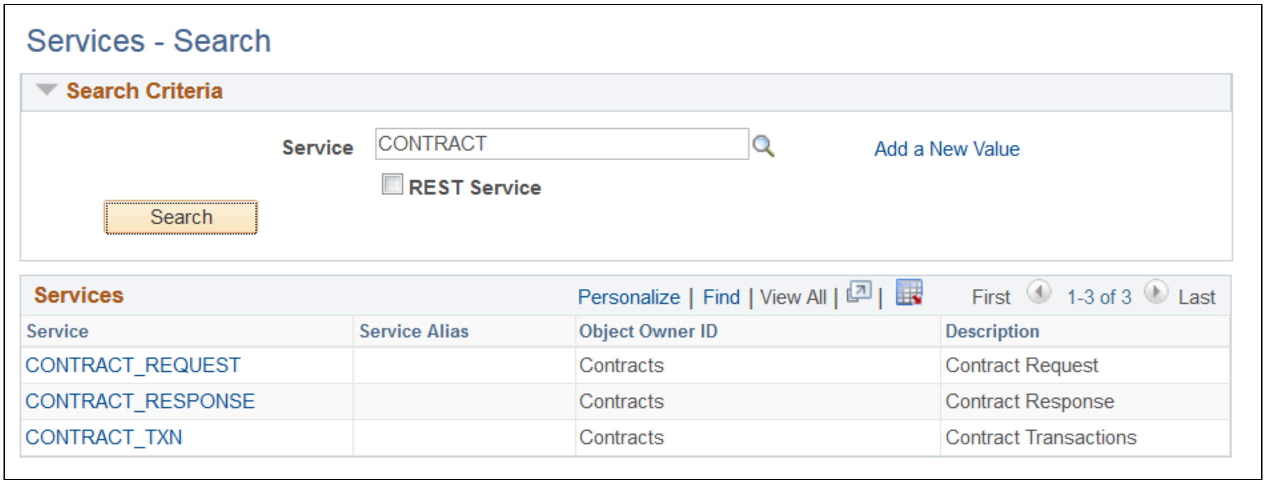
To activate the integration services (messages):

1. Sign in to PeopleSoft Pure Internet Architecture.
2. Select PeopleTools, Integration Broker, Integration Setup, Services.
3. On the Services search page, search for and select the service name *CONTRACT_REQUEST.*
4. Open and activate the service operation by doing one of the following:

a. Directly open a service operation.

Select PeopleTools, Integration Broker, Integration Setup, Service Operations. Search for *CONTRACT_REQUEST*.

You can choose to filter through the Service Name or Service Operation, as shown in the following example:

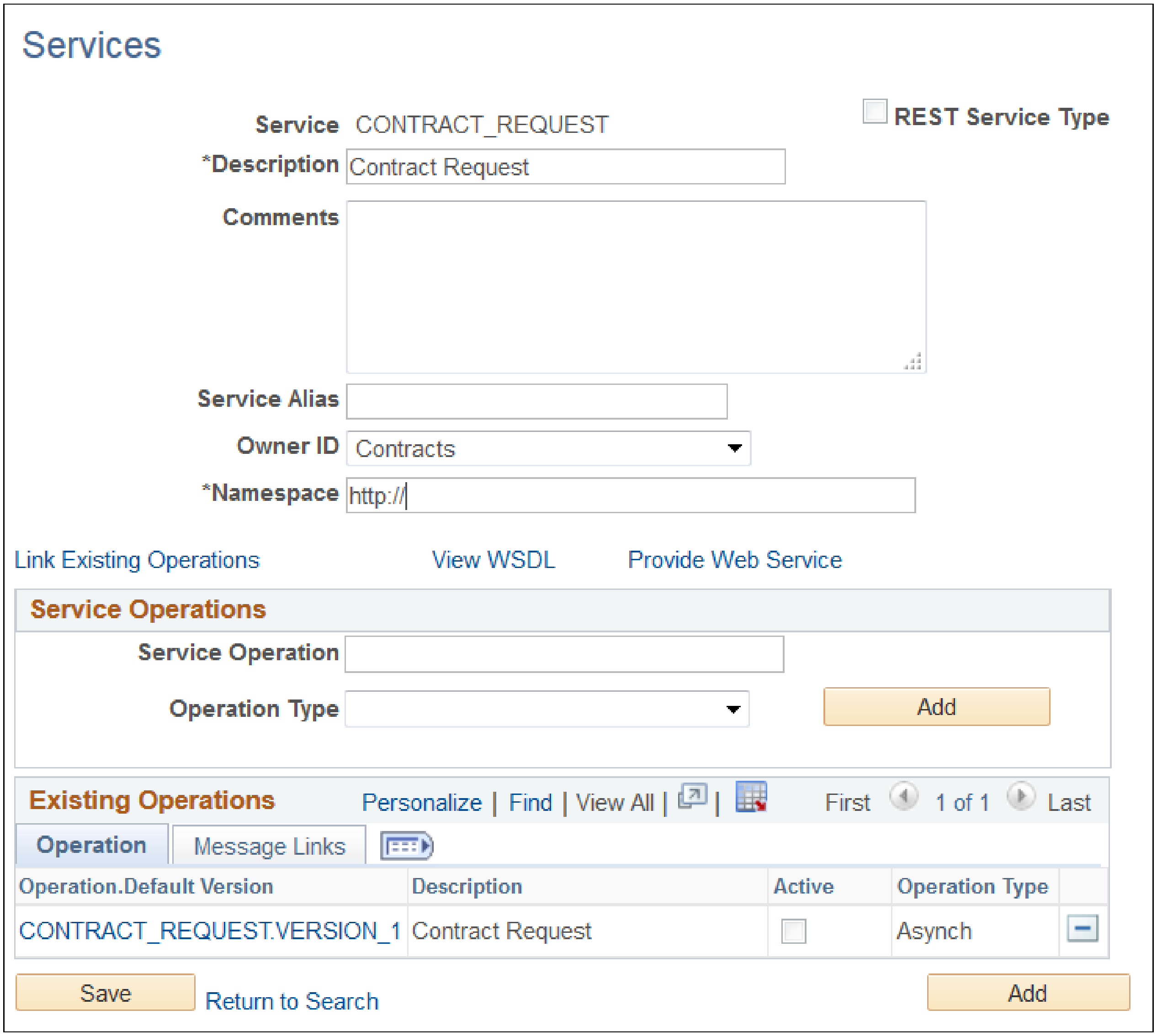


Services – Search page

b. Open a service and then its corresponding service operation.

Each service has a corresponding service operation that the PeopleSoft system delivers. For each of the service operations in the preceding list, you can open the service that has the same name.

Select PeopleTools, Integration Broker, Integration Setup, Services and search for the service name *CONTRACT_REQUEST*, as shown in the following example:

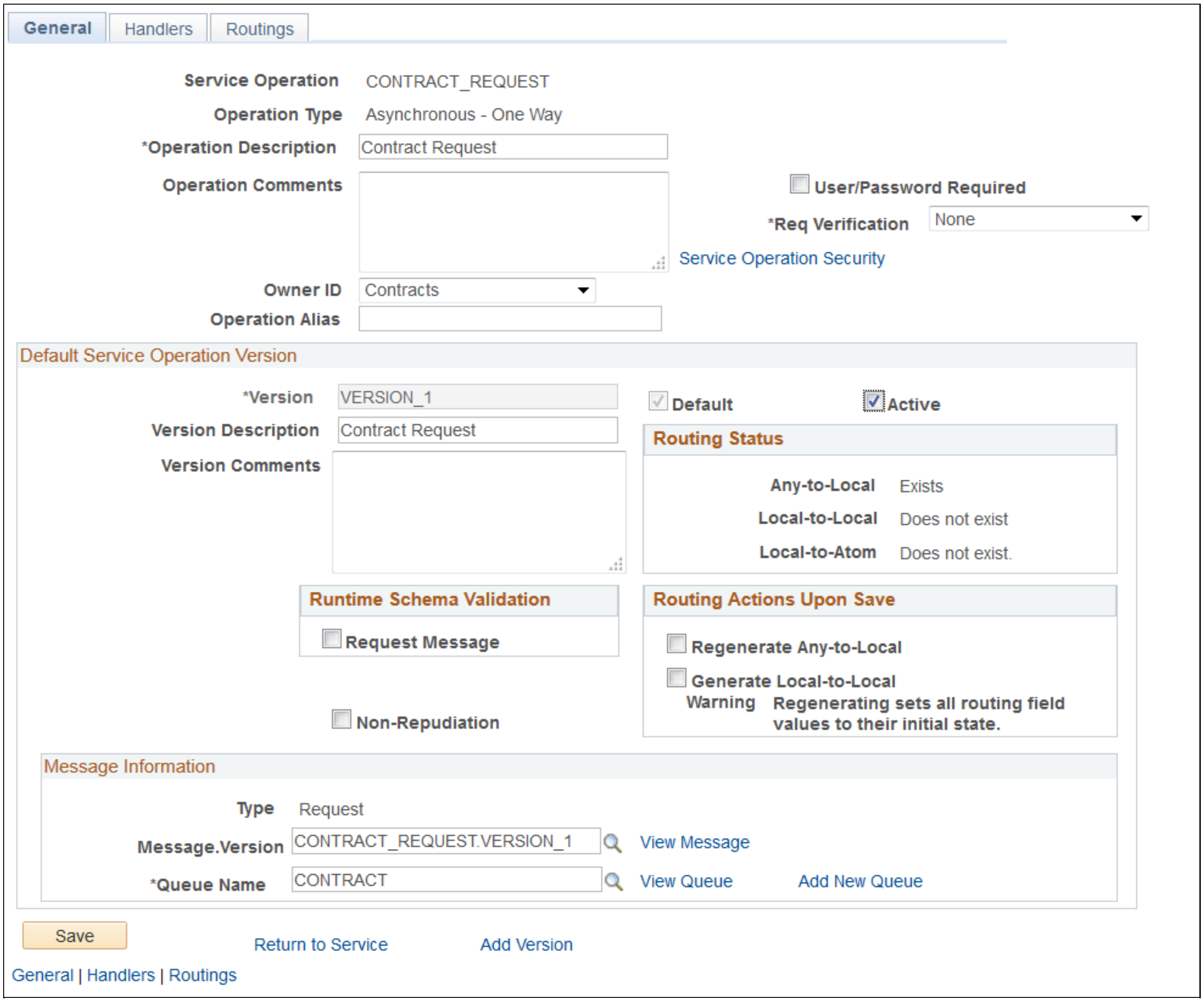


Services – Service Operation Request page

Click the CONTRACT_REQUEST.VERSION_1 link in the Operation tab of the Existing Operations grid that lists the Default Version. This link opens the service operation.

After you open a service operation using either of these options, you can activate and configure it.

5. On the General tab, select the Active check box, as shown in the following example:



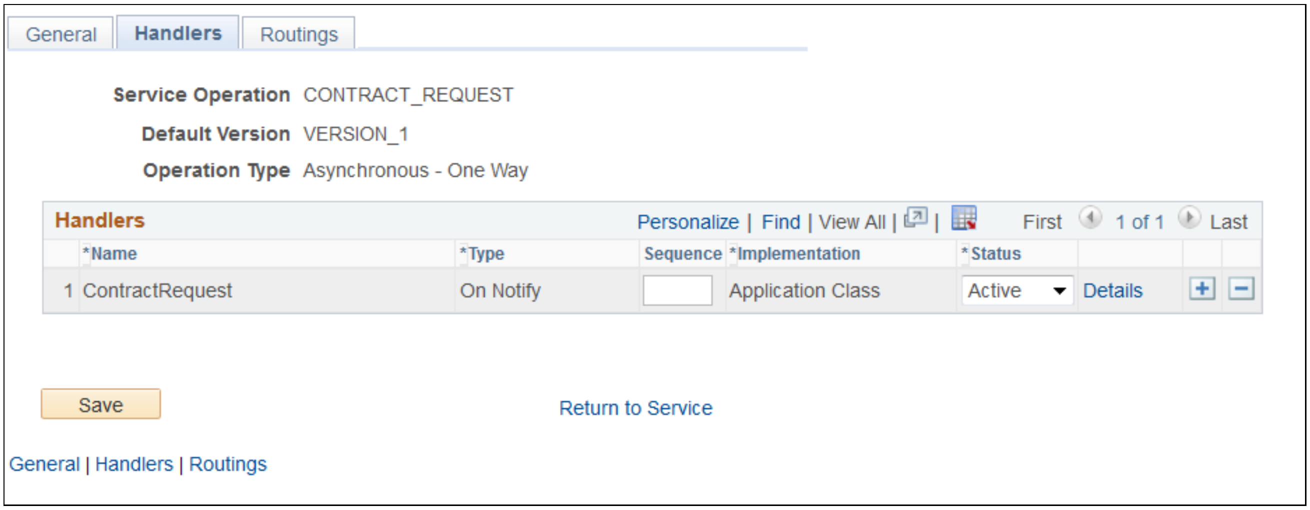
Service Operation page: General tab

6. Click Save.
7. Select the Handlers tab to access the Handlers page.

8. On the Handlers page, if any handlers are listed, select *Active* from the Status drop-down list box.

   In the example that follows, the status is set to *Active* for the handler name *ContractRequest.*

Note. CONTRACT_REQUEST and CONTRACT_TXN have handlers defined in PeopleSoft FSCM for Contracts.

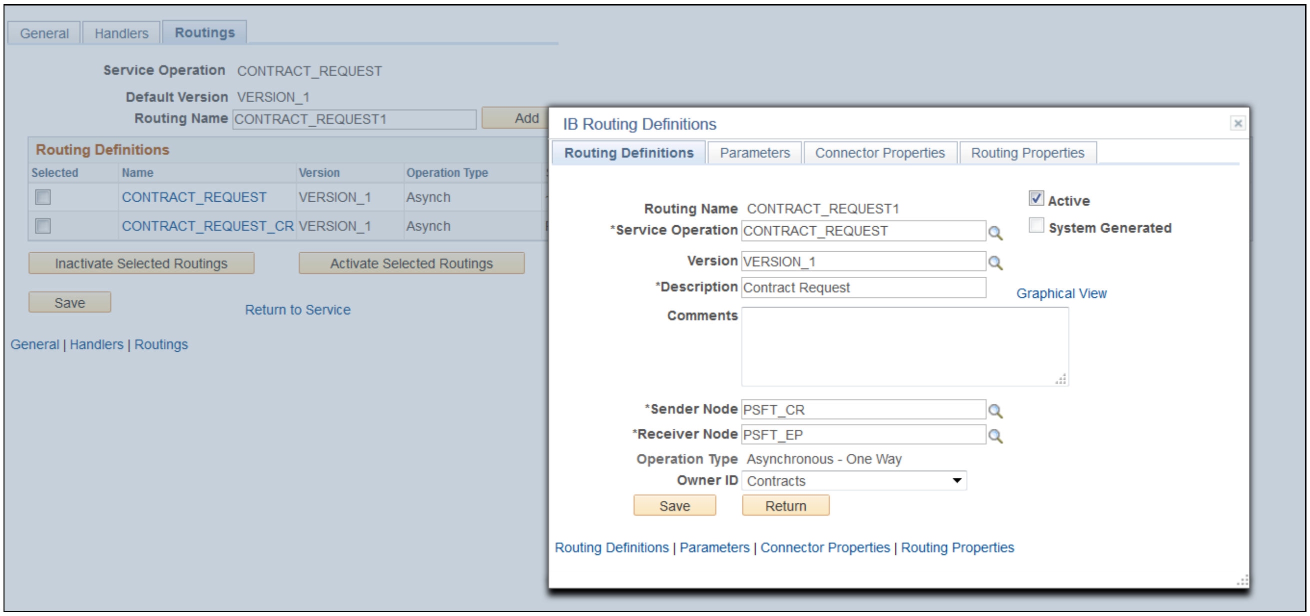


Service Operation page: Handlers tab

9. Select the Routings tab to access the Routings page.
10. On the Routings page, in the Routing Name field, enter a value such as *CONTRACT_REQUEST1.*

11. Click the Add (+) button to add the new routing.

    The Routing Definitions page for the routing CONTRACT_REQUEST1 appears, as shown in the following example:



Routing Definitions page

12. Review the discussion and prerequisite details in the previous section, Understanding New Routing Definition Creation, *before* you configure the new routing definition in the next step.
13. Configure the new routing definition as follows:
    a. Select the Active check box.
    b. In the Sender Node field, enter the correct sender node.
    c. In the Receiver Node field, enter the correct receiver node.
    d. In the Owner ID field, enter the correct object owner ID, if applicable.

    Note. In the PeopleSoft FSCM database, the Owner ID is always *Contracts*.

    e. Click Save.
14. Repeat the preceding steps for the following service operations (messages):
    - CONTRACT_RESPONSE
    - CONTRACT_TXN (VERSION_2)
    - PENDING_ACTIVITY

Task 14-3: Transforming the Contract Transaction Service

PeopleSoft Contracts in PeopleSoft FSCM uses CONTRACT_TXN version 2 for all of the processing that relates to the PeopleSoft Transaction Billing Processor. PeopleSoft CRM uses CONTRACT_TXN version 1. The default version is version 1 in PeopleSoft CRM, whereas it is version 2 in PeopleSoft FSCM. Because of the difference in the versions of the same message, you must set up the transformation of incoming message version 1 from PeopleSoft CRM to version 2 in PeopleSoft FSCM.

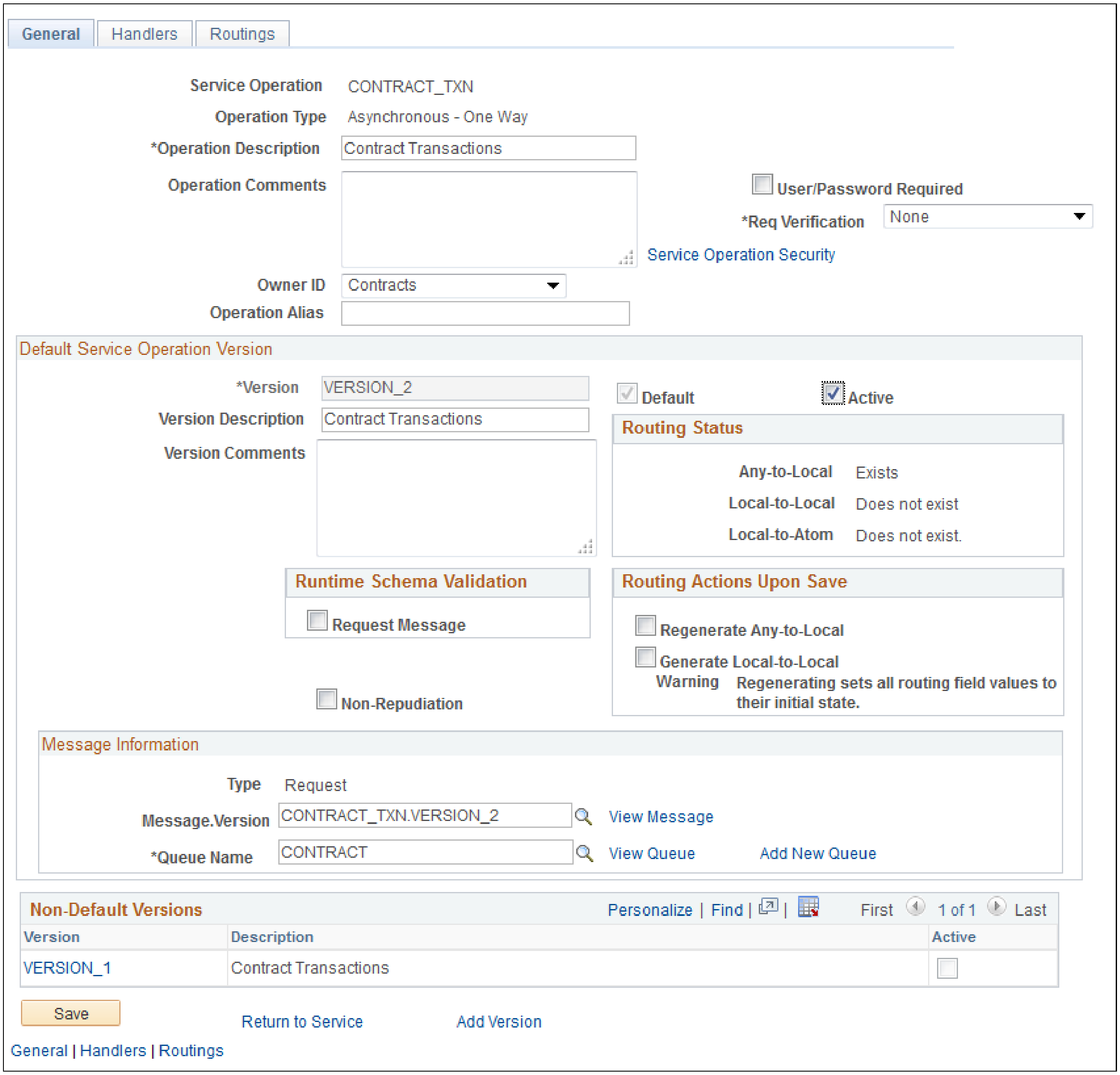
You need to open the CONTRACT_TXN Service Operation (Message) properties and activate the non-default version 1 of the message (you activated the default version 2 in earlier steps). Both versions must be active for the transformation to work correctly. The required steps are as follows:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations and search for service name *CONTRACT_TXN.*

   Alternatively, select PeopleTools, Integration Broker, Integration Setup, Services and search for service name *CONTRACT_TXN.*

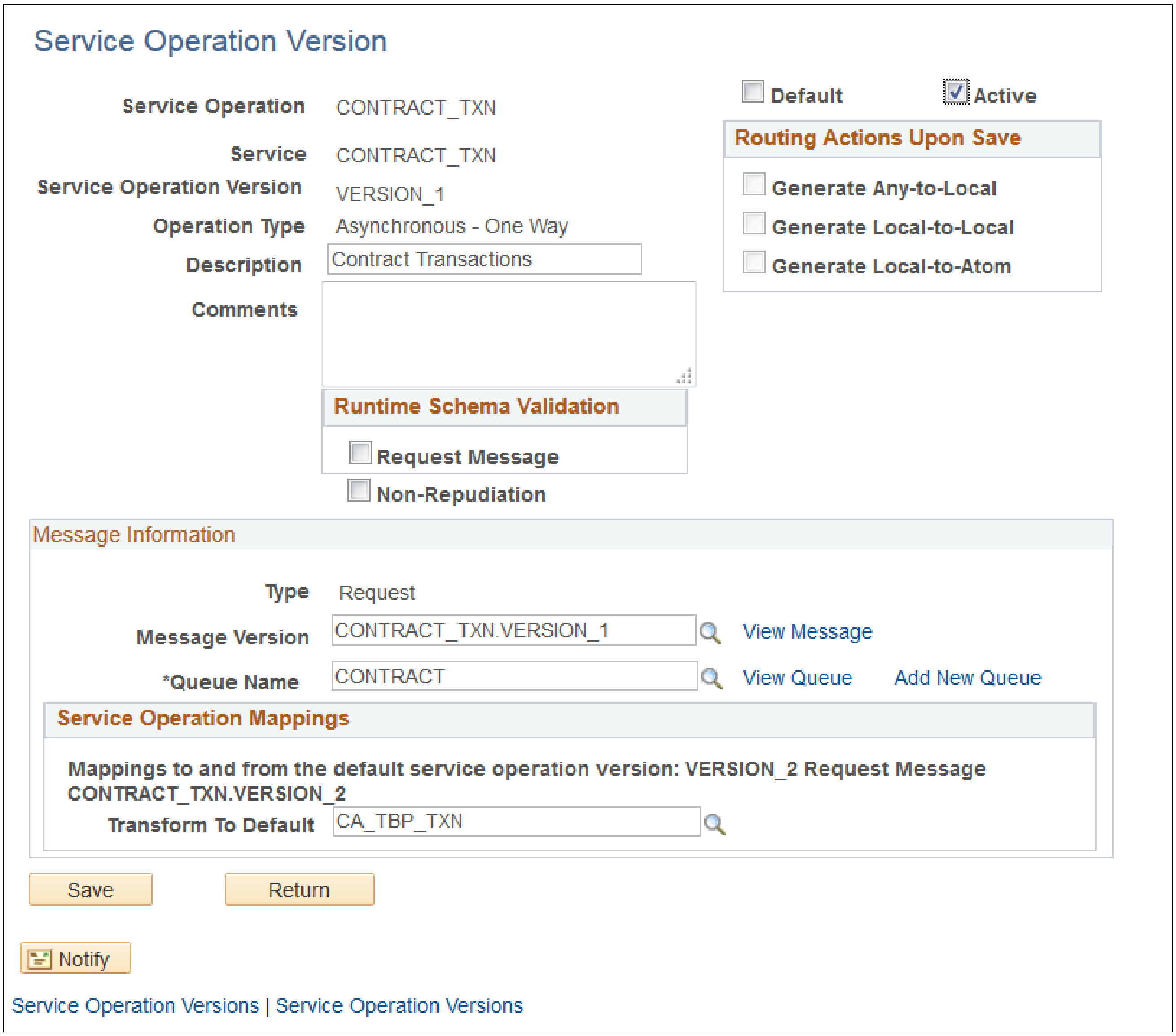
2. Click the CONTRACT_TXN.VERSION_2 link in the Operation tab of the Existing Operations section.

   The Service Operation page for CONTRACT_TXN appears, as shown in the following example:



Service Operation page: General tab

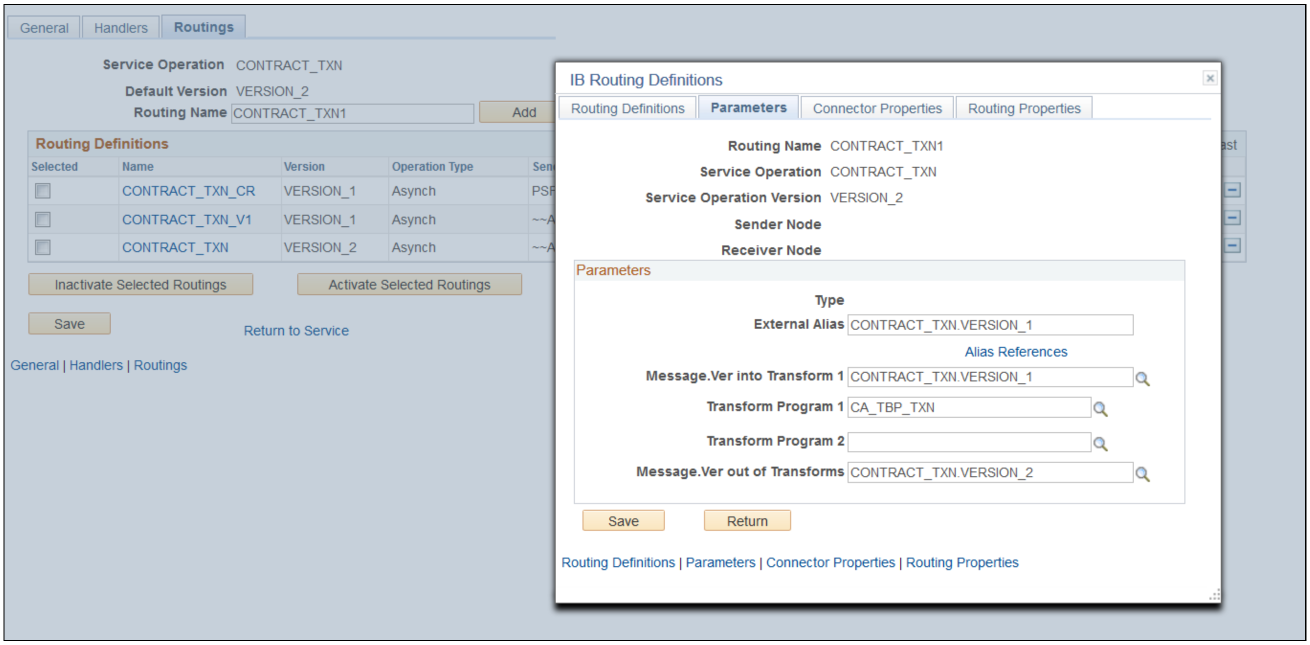
3. On the Service Operation - General page, in the Non-Default Versions group box, click the VERSION_1 link to open the Non-Default Version - VERSION_1 page for CONTRACT_TXN, as shown in the following example:



Service Operation Version page

4. Enter the values shown in the preceding example.
5. Select the Active check box to activate the service operation.
6. Select Save and then click Return.
7. Select the Routings tab to access the Routings page.
8. On the Routings page, click the routing link that you added or activated in the previous task.
9. Select the Parameters tab to access the Parameters page.
10. On the Parameters page, in the Application Engine name field, enter *CA_TBP_TXN* for Transform Program 1.
11. In the External Alias field, enter *CONTRACT_TXN.VERSION_1*.
12. In the Message.Ver into Transform 1 field, enter *CONTRACT_TXN.VERSION_1*.

13. In the Message.Ver out of Transforms field, enter *CONTRACT_TXN.VERSION_2*, as shown in the following example:



IB Routings Definitions page: Parameters tab

14. Click Save.
15. Clear the Application Server and Web Server cache before you use the system.

Note. The installation of PeopleSoft Transaction Billing Processor 9.2 for PeopleSoft FMS is now complete.

See Also

PeopleSoft CRM: Services Foundation, "Setting Up an Integration to the Transaction Billing Processor"

Chapter 15

Installing PeopleSoft 9.2 Maintenance Management with Microsoft Project 2007/2010

This chapter discusses:

- Understanding the Integration with Microsoft Project
- Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine
- Installing Microsoft Project 2007/2010
- Configuring the Microsoft Project Integration Process

Understanding the Integration with Microsoft Project

This chapter describes the integration of PeopleSoft Maintenance Management with Microsoft Project 2007 or Microsoft Project 2010. The integration procedure includes the following tasks:

Important! It is important that you carry out these tasks in the order given in this chapter.

1. Set up a PeopleSoft Process Scheduler server on a Microsoft Windows machine to run against the PeopleSoft 9.2 Maintenance Management database.

   The integration with Microsoft Project 2007 or Microsoft Project 2010 uses a PeopleSoft Process Scheduler server to communicate with the Microsoft Project.
2. Install the Microsoft Project 2007 or Microsoft Project 2010 software on the PeopleSoft Process Scheduler server.
3. Configure the Integration process.

See the product documentation for PeopleSoft FSCM: Maintenance Management for more information about PeopleSoft Maintenance Management integration with Microsoft Project.

Task 15-1: Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine

Follow the standard installation instruction to install PeopleSoft PeopleTools on a Microsoft Windows machine, and then configure that machine as a process scheduler to connect to the PeopleSoft 9.2 FSCM database where the PeopleSoft Maintenance Management product resides.

See the PeopleTools installation guide for your database platform, "Setting up Process Scheduler on Windows."

Task 15-2: Installing Microsoft Project 2007/2010

Install Microsoft Project 2007 or Microsoft Project 2010 on the same Microsoft Windows machine where the PeopleSoft Process Scheduler server resides.

Important! You should not install the PeopleSoft-Microsoft Project Integrator on the PeopleSoft Process Scheduler that runs the PeopleSoft Maintenance Management's Microsoft Project integration.

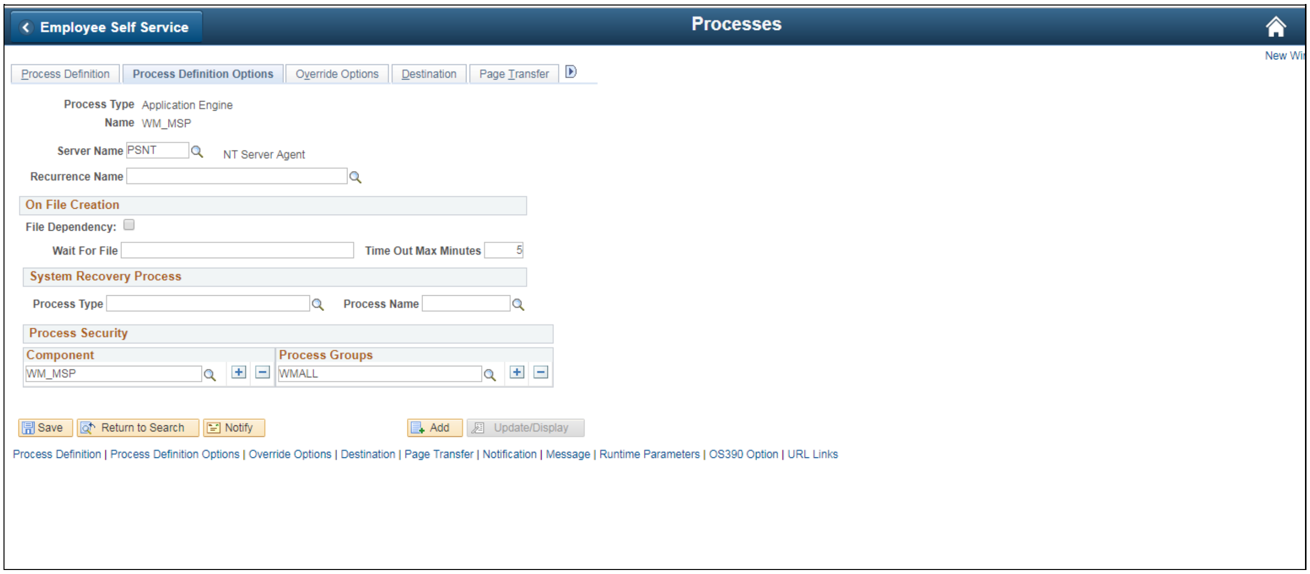
Task 15-3: Configuring the Microsoft Project Integration Process

To configure the integration process:

1. Sign in to PeopleSoft Pure Internet Architecture.
2. Select PeopleTools, Process Scheduler, Processes.
3. On the Process search page, search for and select process name *WM_MSP*.

   The Process Definition page appears.
4. On the Process Definition page, select the Process Definition Options tab to access the Process Definition Options page.

5. On the Process Definition Options page, in the Server Name field, enter the name of the process scheduler server that you configured in the earlier task titled "Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine," as shown in the following example:



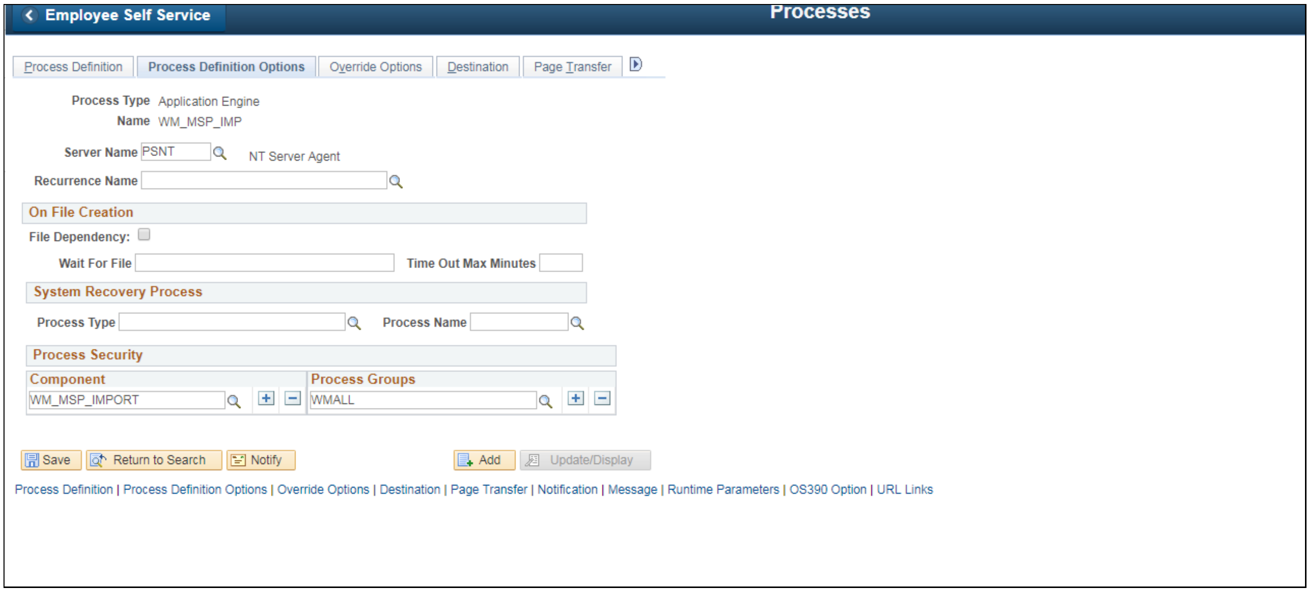
Process Definition Options page for process name WM_MSP

6. Click Save.
7. Select PeopleTools, Process Scheduler, Processes.

   The Process search page appears.
8. On the Process search page, search for and select process name *WM_MSP_IMP*.

   The Process Definition page appears.
9. On the Process Definition page, select the Process Definition Options tab to access the Process Definition Options page.

10. On the Process Definition Options page, in the Server Name field, enter the name of the process scheduler server that you configured in the earlier task titled "Installing the PeopleSoft PeopleTools Process Scheduler on a Microsoft Windows Machine," as shown in the following example:



Process Definition Options page for process name WM_MSP_IMP

11. Click Save.

Chapter 16

Installing PeopleSoft Maintenance Management 9.2 Work Order Attachment Print

This chapter discusses:

- Understanding PeopleSoft Work Order Attachment Print
- Prerequisites
- Verifying the URLs and the Installation Location
- Enabling the PeopleSoft Work Order Attachment Print Features

Understanding PeopleSoft Work Order Attachment Print

PeopleSoft Maintenance Management Work Order Attachment Print utilizes the printing capabilities of many additional component (third-party) applications that support printing files from a command-line interface. A variety of documents that are created using Microsoft Office, such as Microsoft Word, Microsoft PowerPoint, Microsoft Excel, as well as other types of documents such as PDF, TXT, JPEG, GIF and BMP can be printed depending on the chosen additional component application.

Prerequisites

Ensure that you meet the following requirements:

- You have installed an additional component application that allows you to print a list of files of various types to a network printer from a single command-line interface.
- You have installed the additional component application on the PeopleSoft Process Scheduler server that you use to print Work Order Attachments.

  This should be the same process scheduler server that you currently use to print the Work Order Task Details report.
- You are running PeopleSoft PeopleTools 8.55.05 or higher.

Note. An instance of the additional component application cannot be running in memory on the server, except as managed by the PeopleSoft Work Order Attachment Print process.

If the additional component application is provided with a quick-start utility, that utility will typically need to be disabled on the server.

Task 16-1: Verifying the URLs and the Installation Location

This section discusses:

- Modifying the Attachment Print Command URL
- Modifying the Attachment Print Directory URL for an Alternate Download Holding Directory

Task 16-1-1: Modifying the Attachment Print Command URL

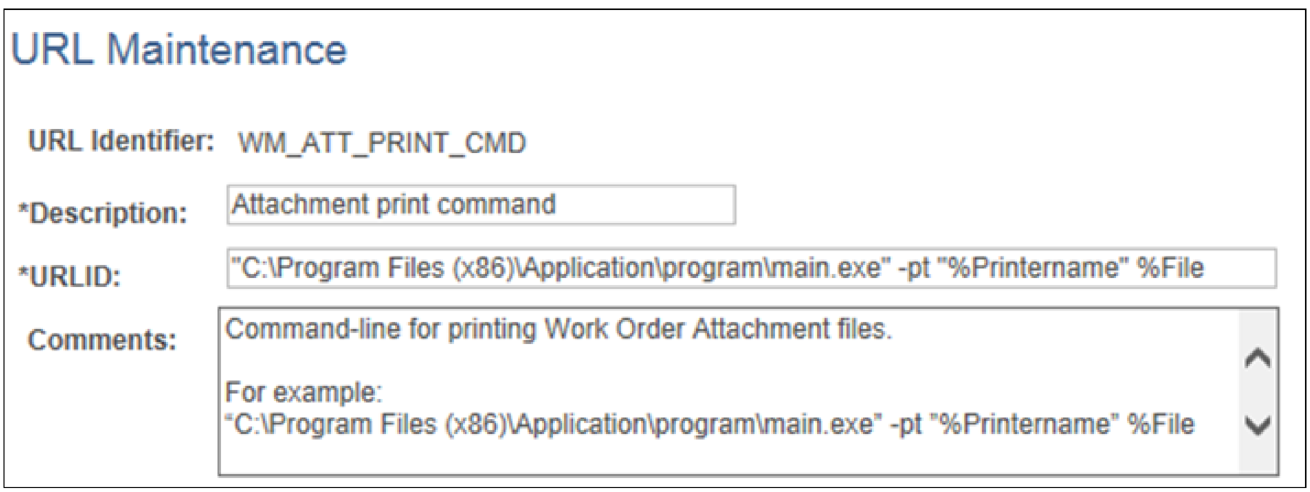
After you install the additional component application, you must update the URL that is used by the PeopleSoft Work Order Attachment Print feature to call the additional component application to print attachments.

The URL WM_ATT_PRINT_CMD must point to the appropriate installation location of the primary additional component application's executable file. This file is typically in the subdirectory that contains the majority of the additional component application's binary executables.

To modify the URL for the additional component application's primary executable installation location:

1. Select PeopleTools, Utilities, Administration, URLs.

   The URL Maintenance page appears, as shown in the following example:

   URL Maintenance page - Attachment print command

2. On the URL Maintenance page, in the URL field, modify the example URL to point to your installation location of the additional component application's primary startup executable and appropriate command-line arguments.

   For example: *C:\Program Files (x86)\Application\program\main.exe" -pt "%Printername" %File*

   In the preceding example, *-pt* is the command-line switch that commands the additional component application to print the list of files to a specified network printer.

3. At runtime the place holder %Printername will be replaced with the network printer name specified in the Output Destination field on the Work Order Task - Details Report Options page. The place holder %File will be replaced with a list of the attachment file(s) to be printed.

   For reference, the original example URL is provided in the Comments field of the URL Maintenance page.

Task 16-1-2: Modifying the Attachment Print Directory URL for an Alternate Download Holding Directory

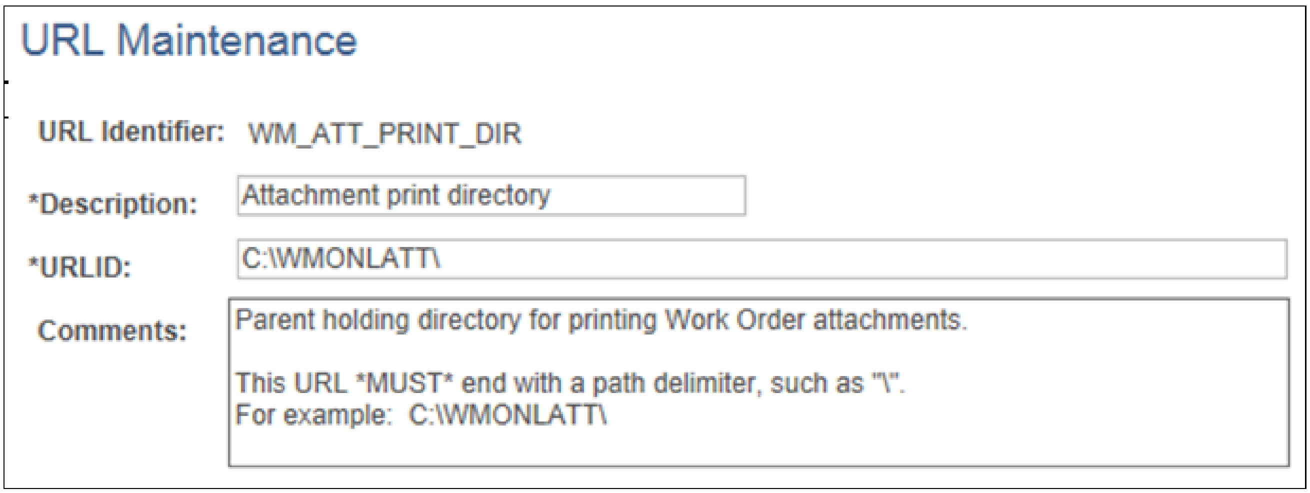
While printing Work Order Attachments, the PeopleSoft Work Order Attachment Print process temporarily downloads the attachments to the server in a holding directory, where they can then be passed on to the additional component application for printing. The URL WM_ATT_PRINT_DIR determines the directory to which the Work Order Attachments download. After the attachments print, they are removed from this temporary directory. The PeopleSoft Work Order Attachment Print process automatically creates this directory on the server if it does not already exist.

By default, the URL is set to: *C:\WMONLATT*

To use a different temporary download holding directory on your server:

1. Select PeopleTools, Utilities, Administration, URLs.

   The URL Maintenance page appears, as shown in the following example:

   URL Maintenance page - Attachment print directory

2. On the URL Maintenance page, modify the default URL C:\WMONLATT\ to the directory that you want to use.

   Note. The slash ("\") path delimiter at the end of the Attachment print directory URL is required and must be entered.

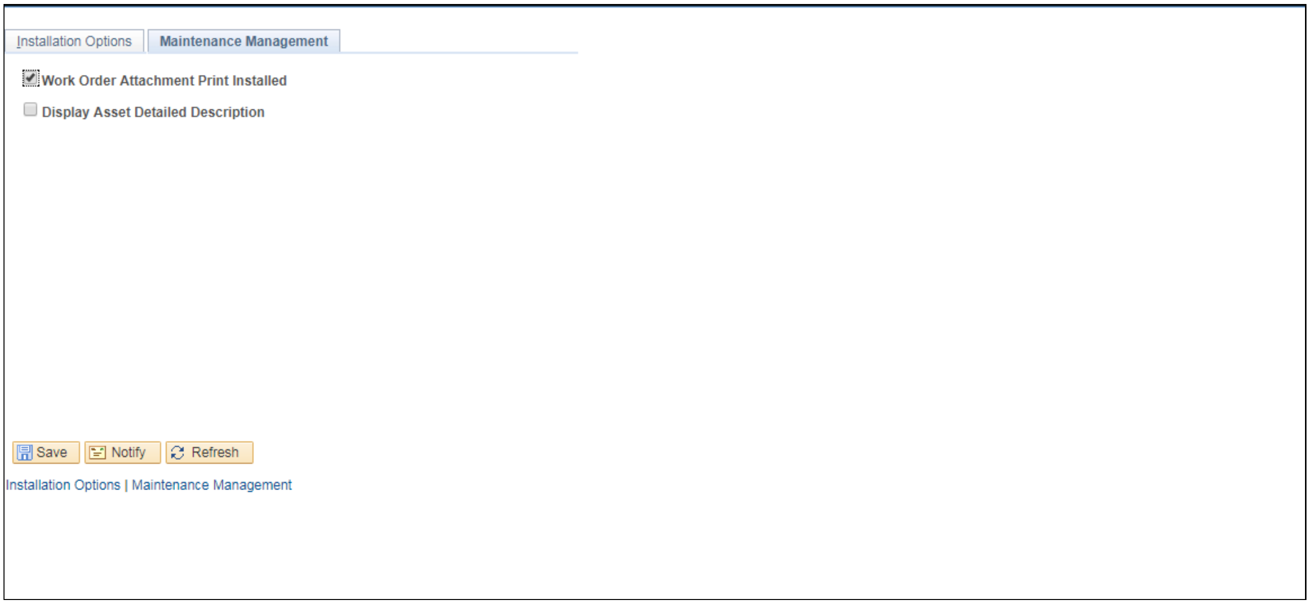
Task 16-2: Enabling the PeopleSoft Work Order Attachment Print Features

After you successfully install the additional component application for printing attachments, you must enable the Print Attachments option that is available for your users on the Work Order Task Detail Report Options page.

To enable the Print Attachments feature:

1. Select Set Up Financials/Supply Chain, Install, Installation Options, and then select the Maintenance Management link.

   The Installation Options - Maintenance Management page appears, as shown in the following example:



Installation Options - Maintenance Management page

2. On the Maintenance Management page, select Work Order Attachment Print Installed.

   See the product documentation for PeopleSoft FSCM: Maintenance Management for user set up and implementation information.

Chapter 17

Integrating PeopleSoft 9.2 Asset Management and Physical Inventory Solutions

This chapter discusses:

- Understanding the Integration of PeopleSoft 9.2 Asset Management with Physical Inventory
- Configuring the Inbound Nodes
- Activating Service Operations
- Running Message Channel
- Activating the Domain for Asynchronous Messaging

Understanding the Integration of PeopleSoft 9.2 Asset Management with Physical Inventory

PeopleSoft 9.2 Asset Management integrates with additional component (third-party) Physical Inventory Solutions to provide the following functionality:

- Publish lists of assets in asset repository that need to undergo the physical inventory process.
- Upload results of the physical inventory into asset repository.

Note. In prior PeopleSoft releases, this feature was only available using flat files. If you do not implement the Physical Inventory feature, or you implement using flat files, the tasks in this chapter are optional.

Task 17-1: Configuring the Inbound Nodes

Before configuring the nodes, you need to set up the Integration Gateway.

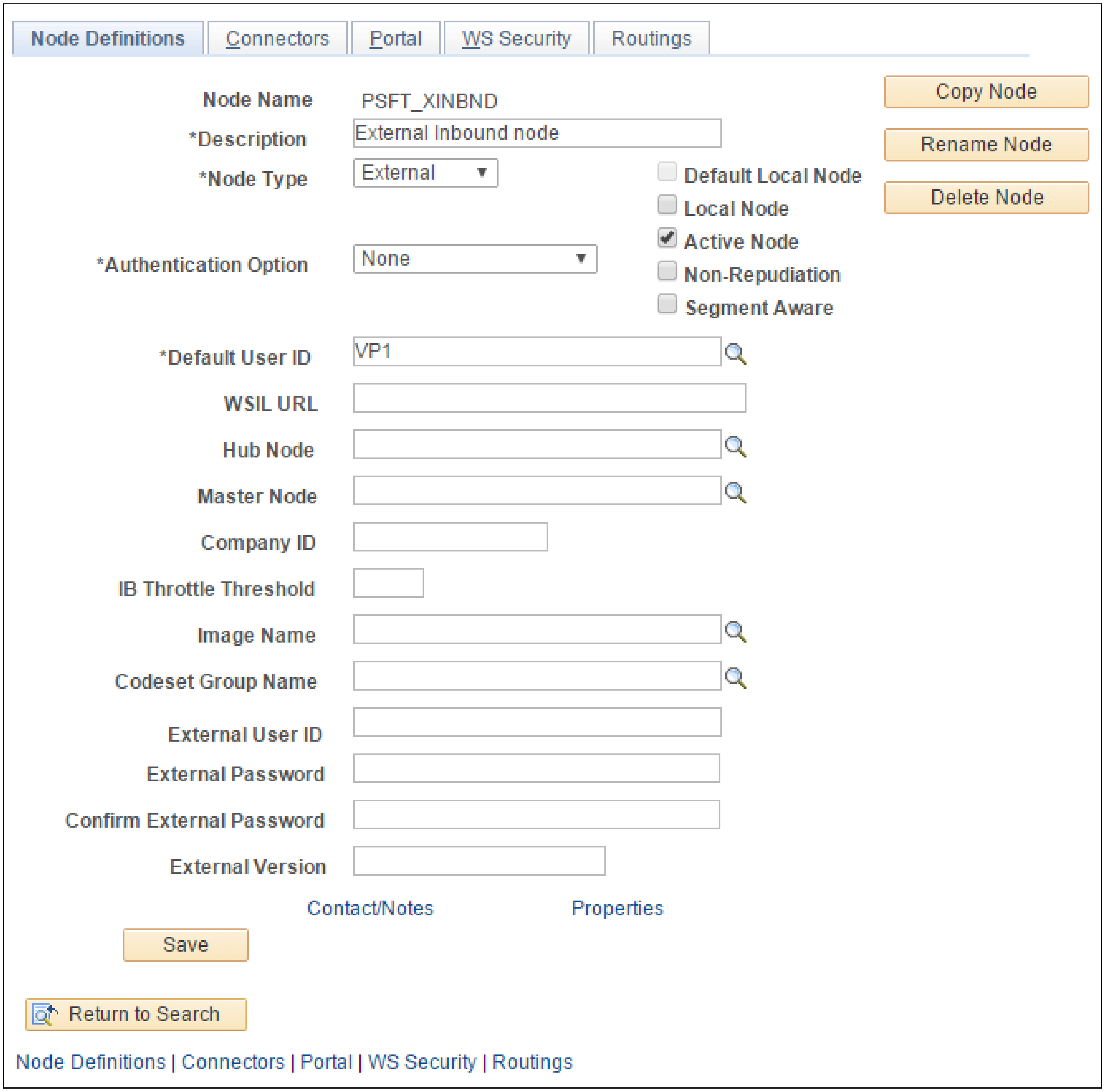
See "Appendix: Applying Common Installation Instructions," Setting Up Integration Gateways for instructions.

To configure the inbound nodes:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.

2. On the Nodes search page, search for and select the node name *PSFT_XINBND*.

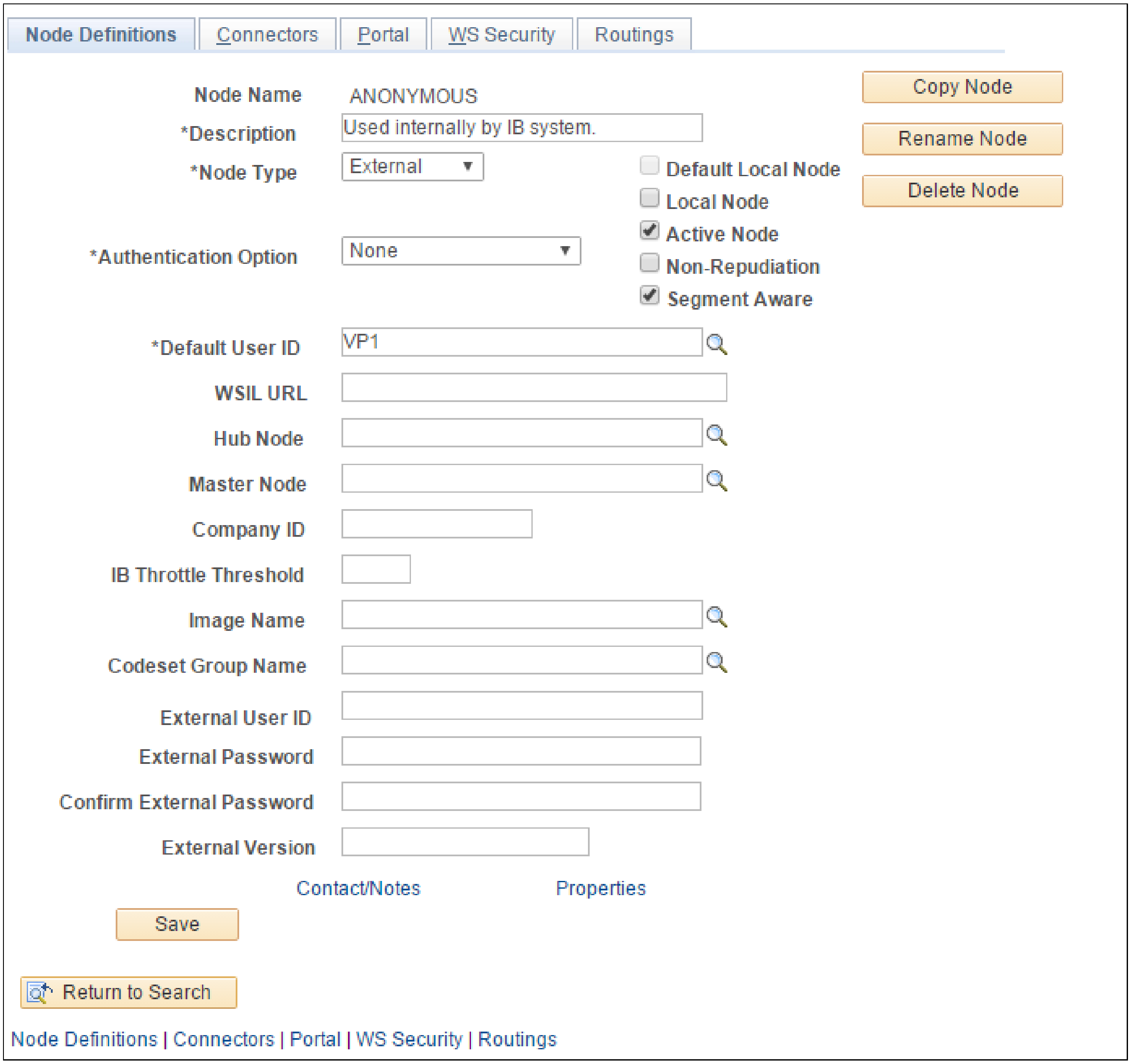
   The Node Definitions page for the PSFT_XINBND node appears, as shown in the following example:



Node Definitions - PSFT_XINBND page

3. On the Node Definitions page, enter the ID of the Asset Management Inventory user in the Default User ID field.
4. Click Save.
5. Click Return to Search.
6. On the Nodes search page, search for and select the node name *ANONYMOUS*.

7. On the Node Definitions page, in the Default User ID field, enter the value for Asset Management Inventory user. A Node Definition page is shown in the following example:



Node Definitions - Anonymous page

8. Click Save.

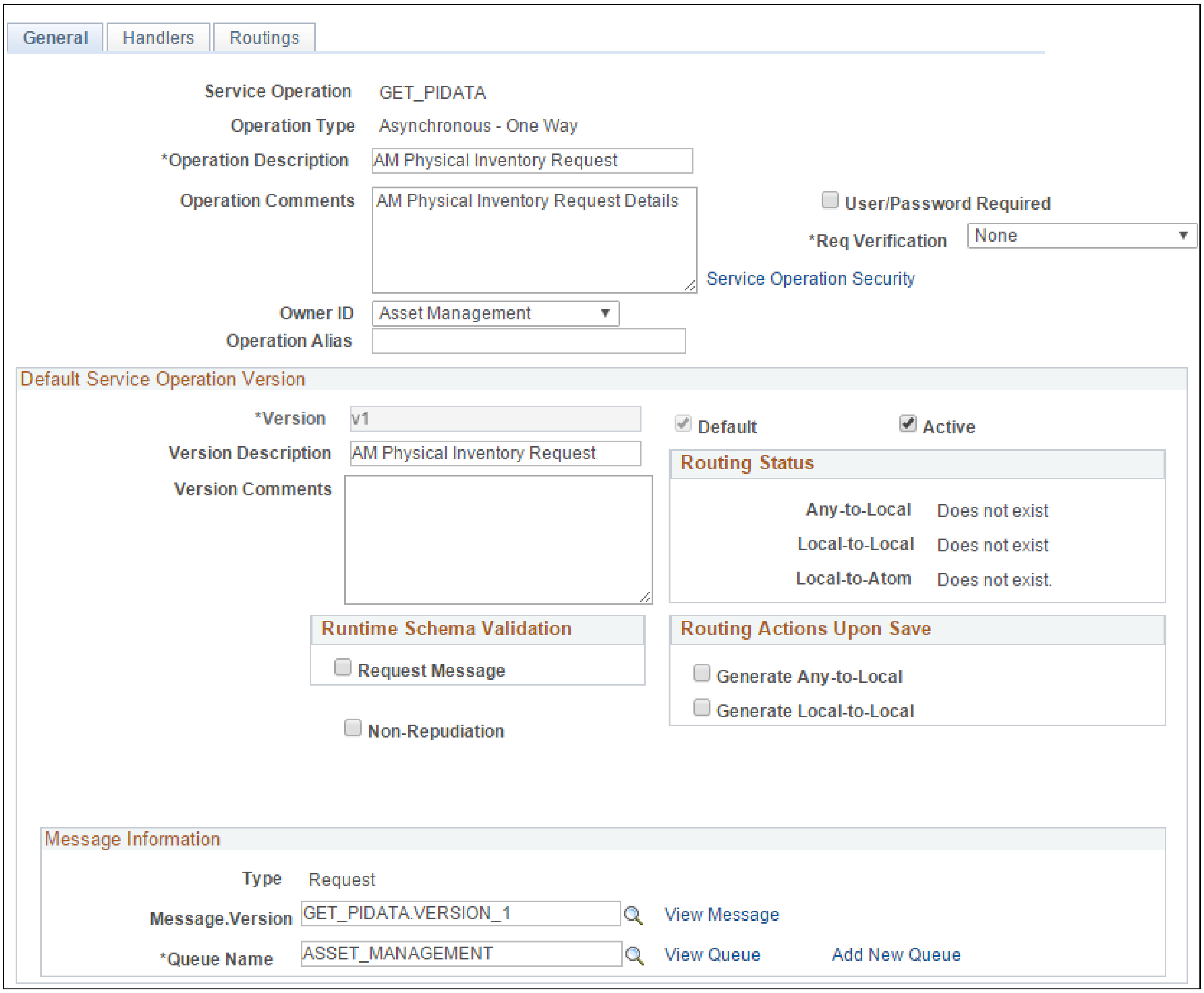
Task 17-2: Activating Service Operations

To activate service operations:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.

2. On the Service Operations search page, search for and select the service operation *GET_PIDATA*.

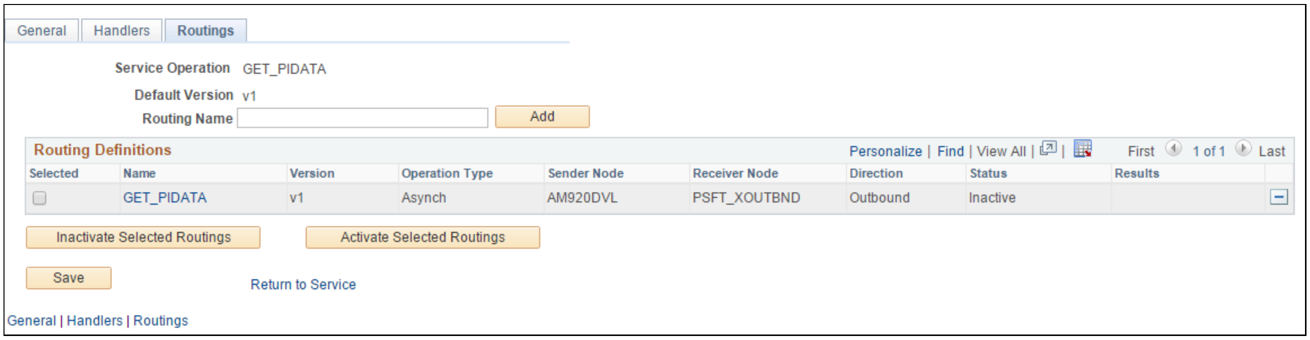
   The Service Operations - General page appears, as shown in the following example:



Service Operations - General page

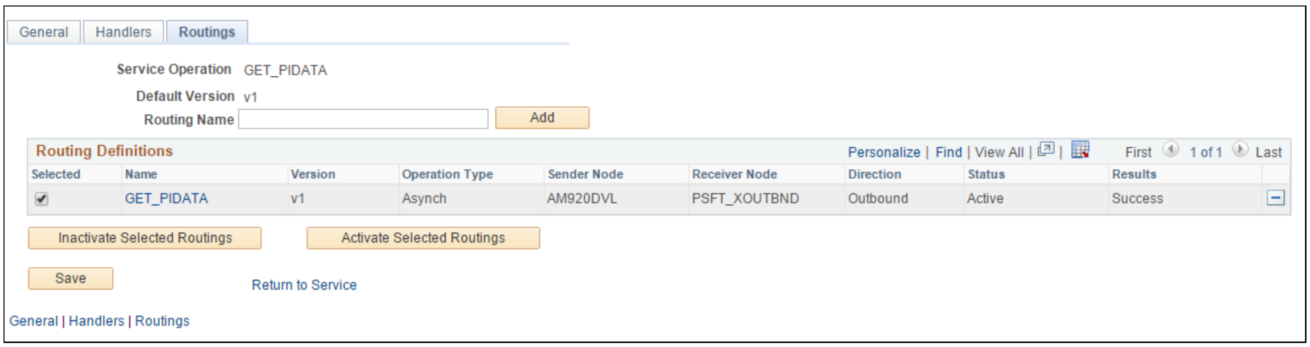
3. On the General page, select the Active check box, and then click Save.
4. On the Save Message dialog box, click OK.

5. Select the Routings tab to access the Routings page, as shown in the following example:



Service Operations - Routings page

6. On the Routings page, select the check box for the routing GET_PIDATA, as shown in the following example:

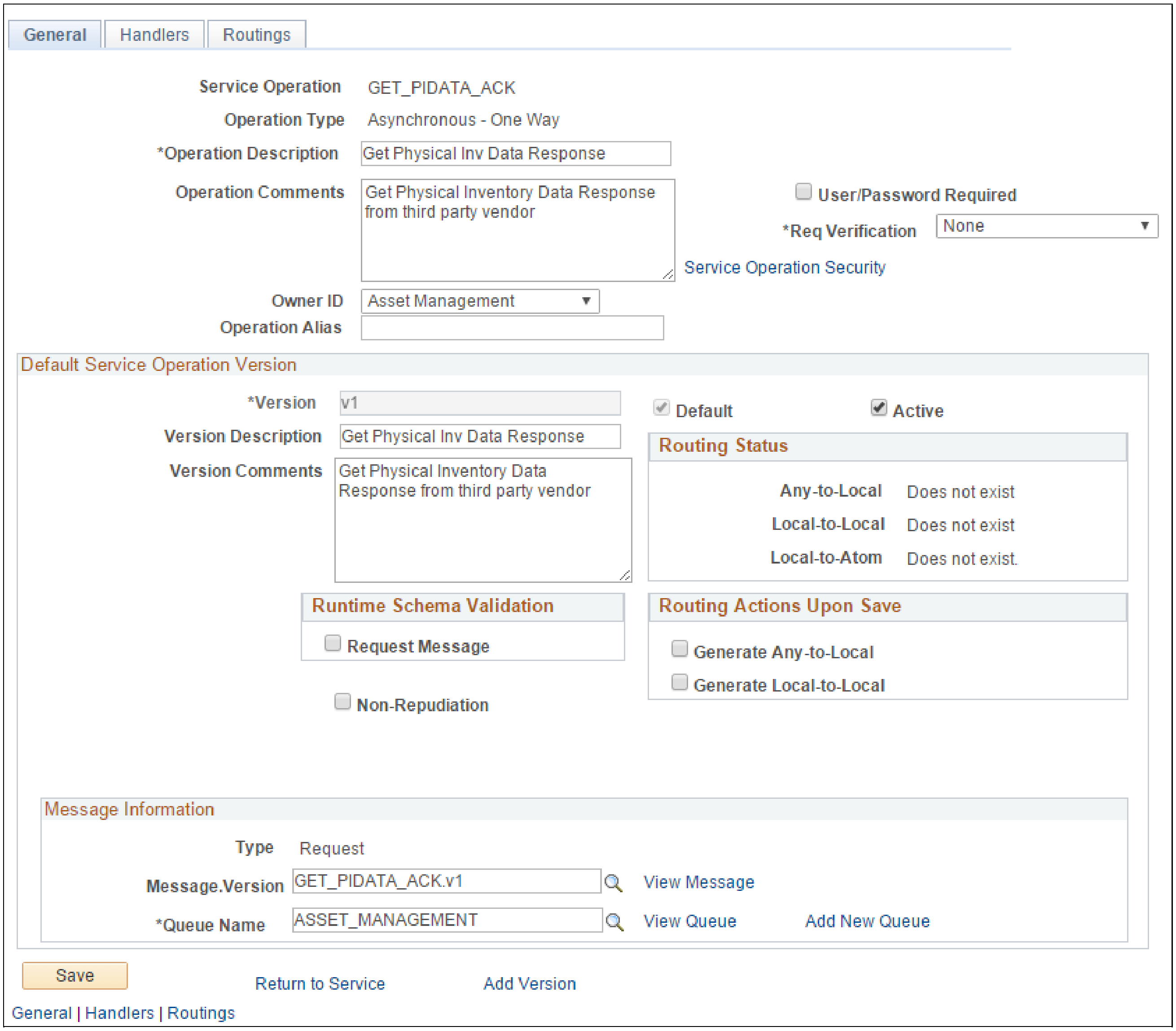


Service Operations - Routings page with the routing definition selected

7. Click the Activate Selected Routings button.
8. Click Save to save Routing Definition.

9. On the Service Operations search page, search for and select the service operation *GET_PIDATA_ACK*.

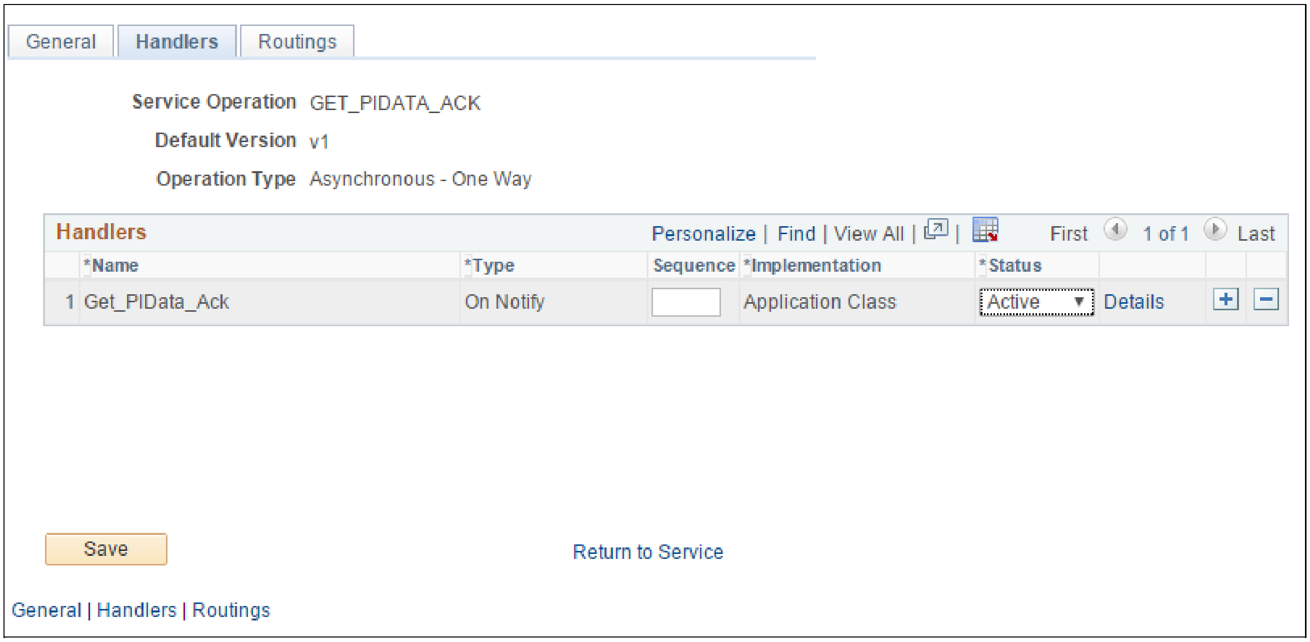
   The Service Operations - General page for GET_PIDATA_ACK appears, as shown in the following example:



Service Operations - General page

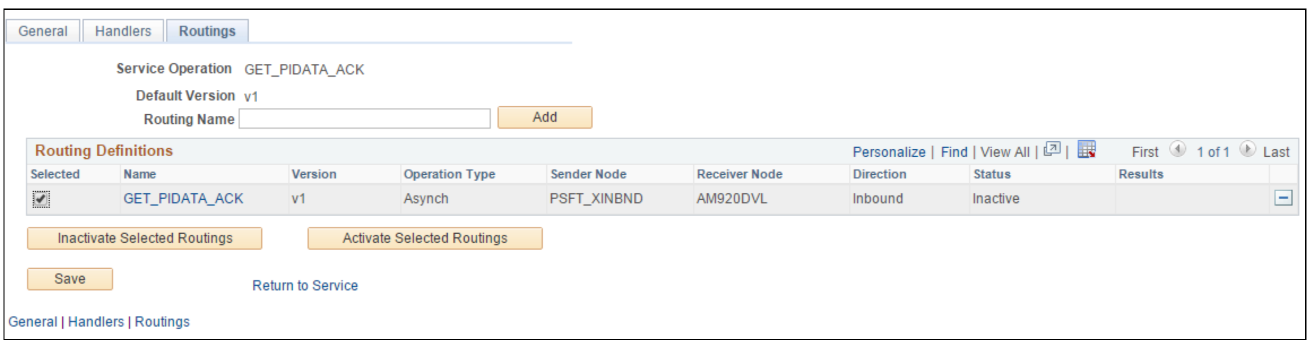
10. On the General page, select the Active check box and then click Save.
11. On the Save Message dialog box, click OK.

12. Select the Handlers tab to access the Handlers page, as shown in the following example:



Service Operations - Handlers page

13. Click Save.
14. Select the Routings tab to access the Routings page, as shown in the following example:



Service Operations - Routings page

15. On the Routings page, select the check box for the routing GET_PIDATA_ACK.
16. Click the Activate Selected Routings button.
17. Click Save.

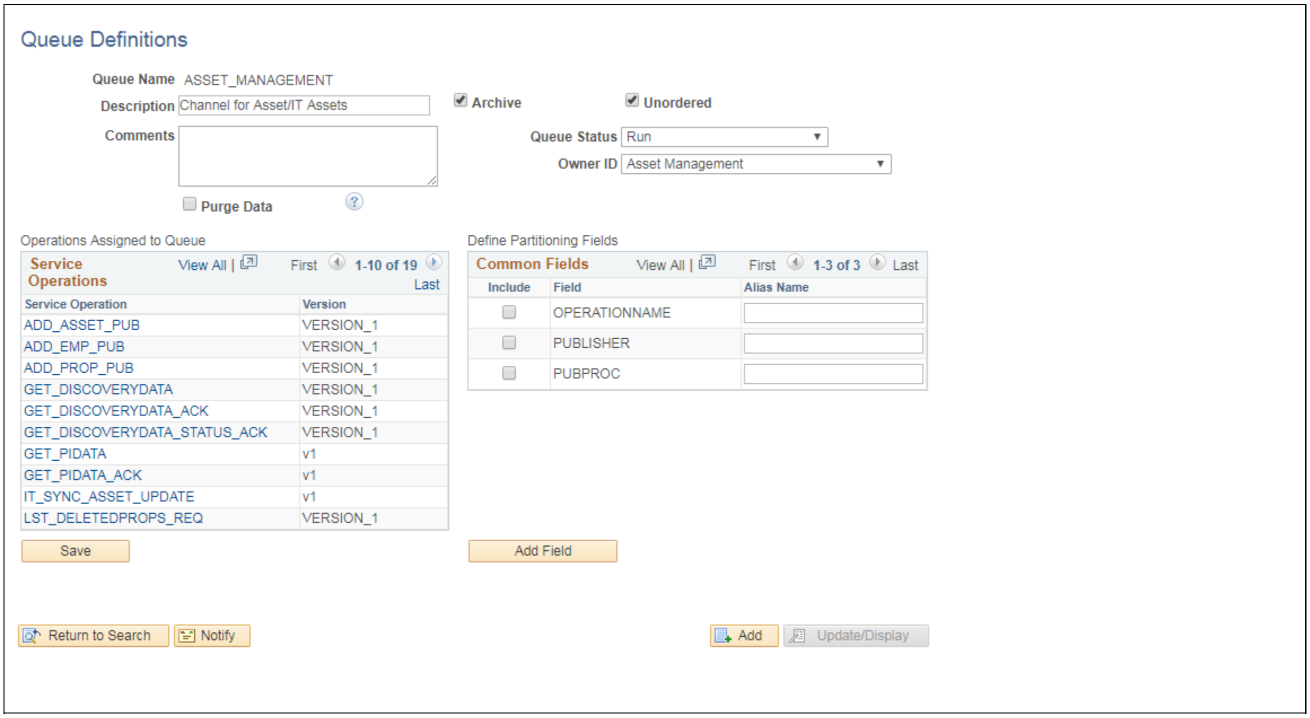
Task 17-3: Running Message Channel

To run the message channel:

1. Select PeopleTools, Integration Broker, Integration Setup, Queues.

2. On the Queues search page, search for and select the queue name ASSET_MANAGEMENT.

   The Queue Definitions page appears, as shown in the following example:



Queue Definitions page

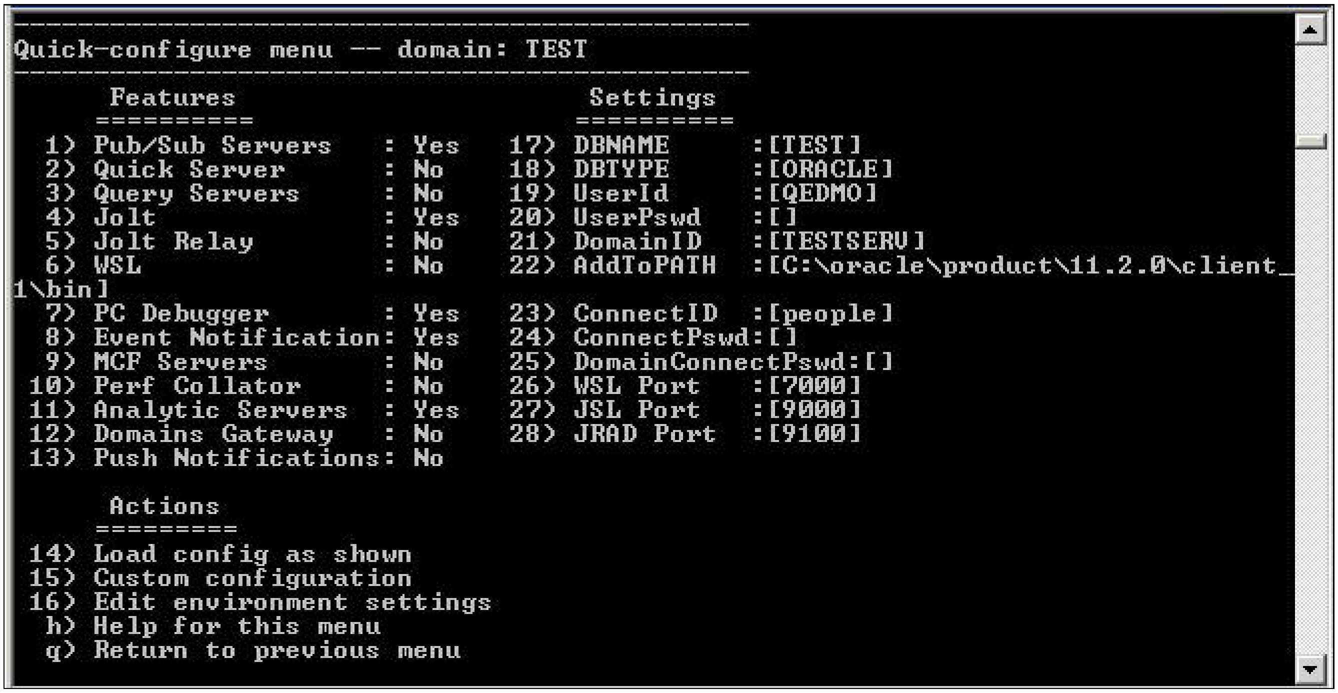
3. On the Queue Definitions page, verify that the Queue Status is set to *Run.*
4. If the Queue Status is Paused, select *Run* from the Queue Status drop-down list box.
5. Click Save.
6. When the Queue Saved Message dialog box appears, click OK.

Task 17-4: Activating the Domain for Asynchronous Messaging

Asynchronous message handling in the PeopleSoft system is different from synchronous message handling. In the asynchronous mode, the system dumps a message into a queue and a message handler picks up the message and gives it to the message dispatcher. The dispatcher then delivers the message to the target node. To enable the message handler and dispatcher, verify that your domain has publish and subscribe servers configured in psadmin.

To enable message handler and dispatcher:

1. Execute the *psadmin* command.
2. Ensure that your domain has publish/subscribe servers configured in psadmin.
3. Set Pub/Sub servers to *Yes* as shown in the following example of the PSADMIN Quick Configure menu:



PSADMIN Quick-configure menu

Note. PSADMIN configuration supports asynchronous messaging. After you start your application server, you see two new processes—one for Message Handler, and one for Message Dispatcher. After you configure your application server, you need to activate your domain through PeopleSoft Pure Internet Architecture, to ensure that the Handler and Dispatcher pick up your asynchronous messages.

Next, activate the local domain.

See the "Appendix: Applying Common Installation Instructions," Activating the Domain for instructions.

This completes the set up for PeopleSoft Asset Management Physical Inventory Web Services.

See the product documentation for PeopleSoft FSCM: Asset Management, "Performing Asset Physical Inventory," for more information about the PeopleSoft Asset Management Physical Inventory cycle where you can utilize service operations.

Chapter 18

Integrating PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems

This chapter discusses:

- Understanding the Integration of PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems
- Reviewing Configuration Values for IT Asset Management
- Configuring the Inbound Nodes
- Activating Service Operations
- Managing Queue Status
- Activating the Domain for Asynchronous Messaging

Understanding the Integration of PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems

PeopleSoft 9.2 IT Asset Management integrates with additional component (third-party) Network Inventory Discovery Systems to provide the following functionality:

- Retrieves the physical attributes of IT Assets in the discovered inventory database to compare to the assets in the financial books.
- Retrieves software of interest installed on the IT Assets.
- Processes Hardware and Software Progress Report data based on integration data and user-defined parameters.

Reviewing Configuration Values for IT Asset Management

Use these values when integrating PeopleSoft 9.2 IT Asset Management with additional component (third-party) Network Discovery Systems.

The following table lists the HTTPTARGET Connector Properties:

*Property ID	*Property Name	Required	Value	Default
HEADER	sendUncompressed	Yes	Y	Y

*Property ID	*Property Name	Required	Value	Default
HTTPPROPERTY	Method	Yes	Post	Y
PRIMARYURL	URL	Yes	http://<LocalHost>/<DiscoveredInventorySystem>/<ConnectorName>	N

The following table lists the routing definitions for the PSFT_EP node that Oracle delivers:

Routing Type	Request Message	Request Message Version
Async	GET_DISCOVERYDATA	VERSION_1
Async	GET_DISCOVERYDATA_LCL	VERSION_1
Async	GET_DISCOVERYDATA_ACK	VERSION_1
Async	GET_DISCOVERYDATA_STATUS_ACK	VERSION_1

Next, set up the integration gateways.

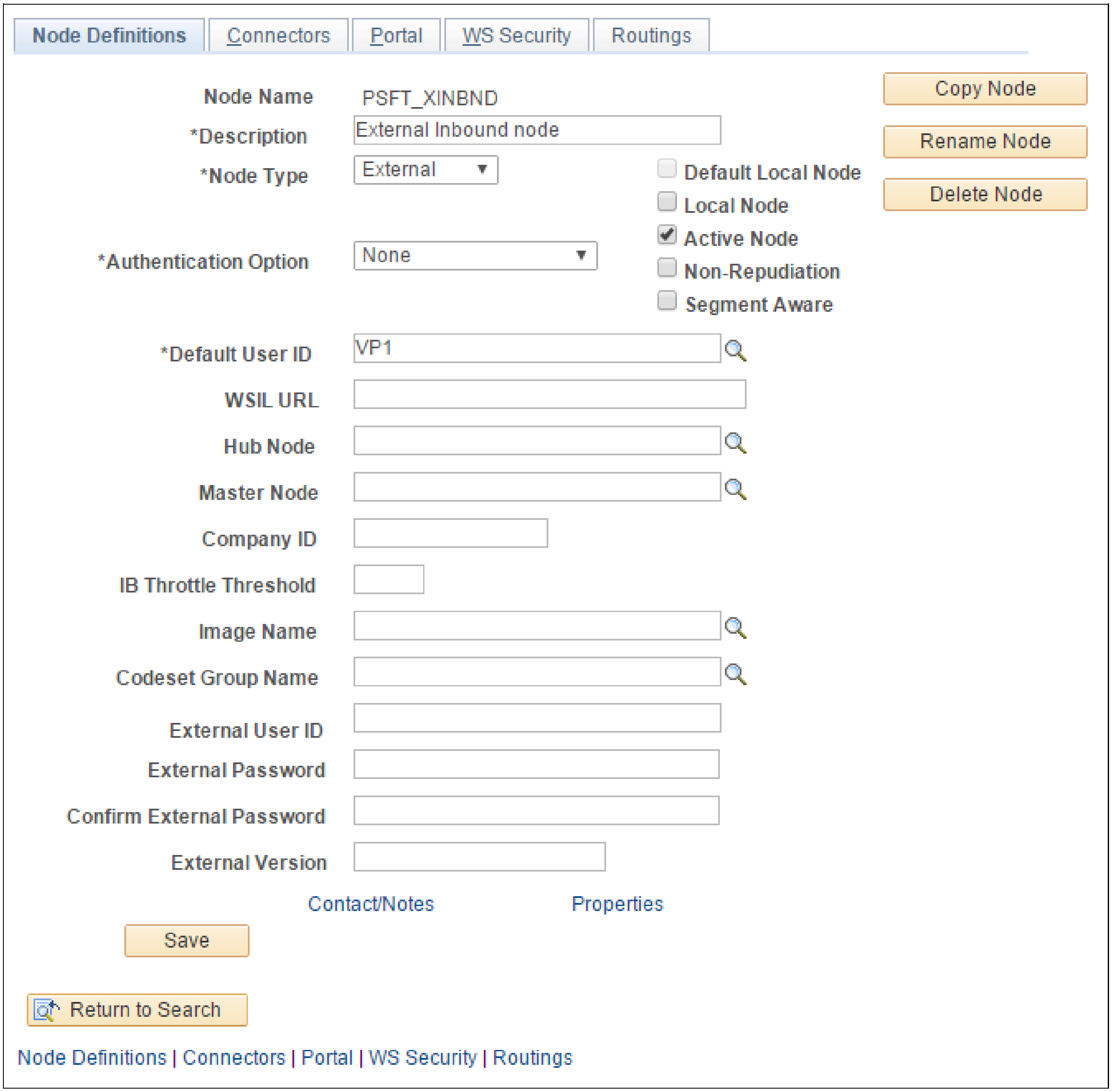
See the "Appendix: Applying Common Installation Instructions," Setting Up Integration Gateways for instructions to set up integration gateway.

Task 18-1: Configuring the Inbound Nodes

To configure the inbound nodes:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name *PSFT_XINBND*.

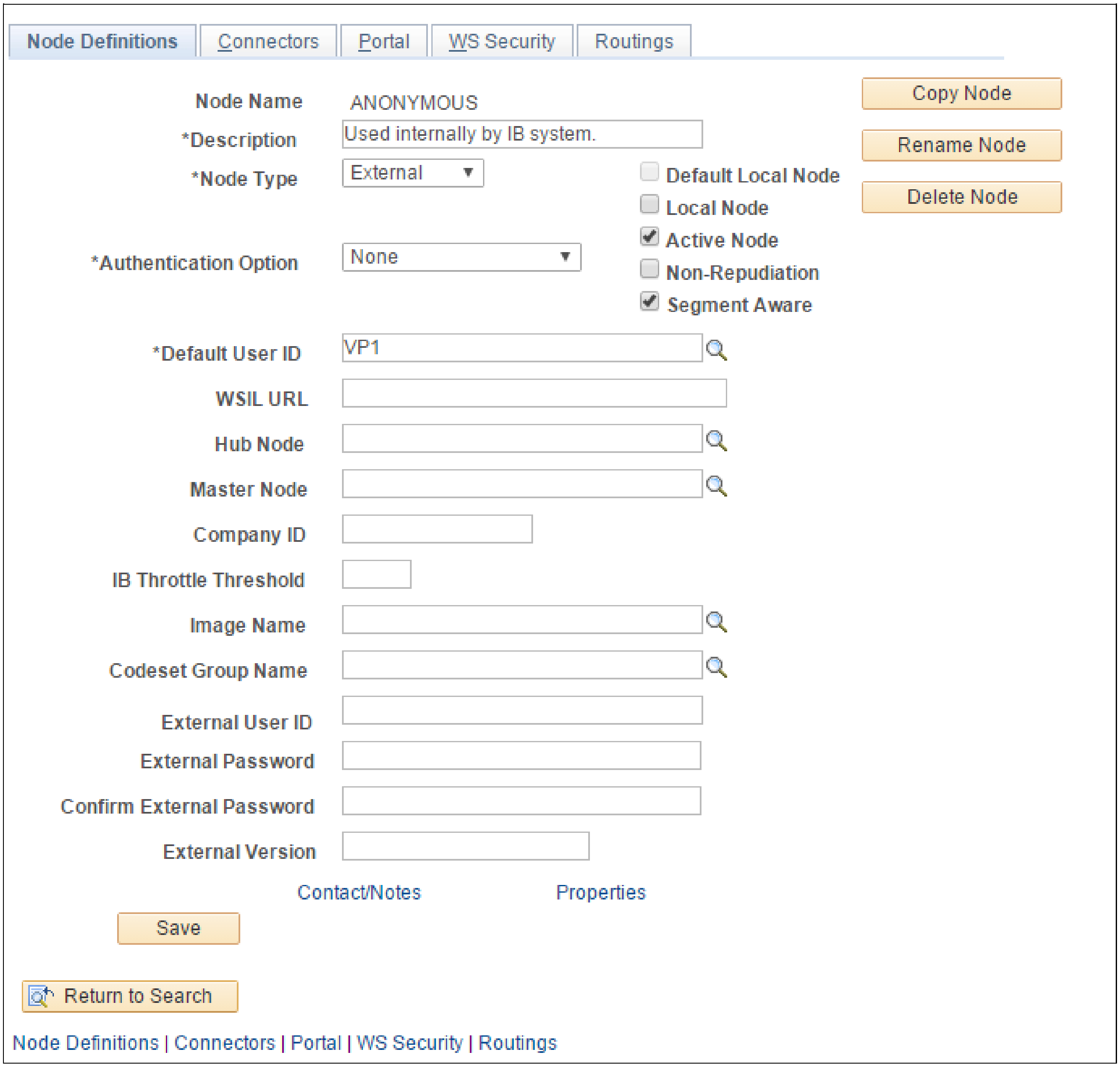
3. On the Node Definitions page, in the Default User ID field, enter the value for the user that submits the PROCESS_DISCOVERYDATA Service Operation into ITAM for the PSFT_XINBND node, as shown in the following example:



Node Definitions page for PSFT_XINBND

4. Click Save.
5. Click Return to Search.
6. On the Nodes search page, search for and select the node name *ANONYMOUS*.

7. On the Node Definitions page, in the Default User ID field, enter the value for the user that submits the PROCESS_DISCOVERYDATA Service Operation into ITAM for the ANONYMOUS node, as shown in the following example:



Node Definitions page for ANONYMOUS

8. Click Save.

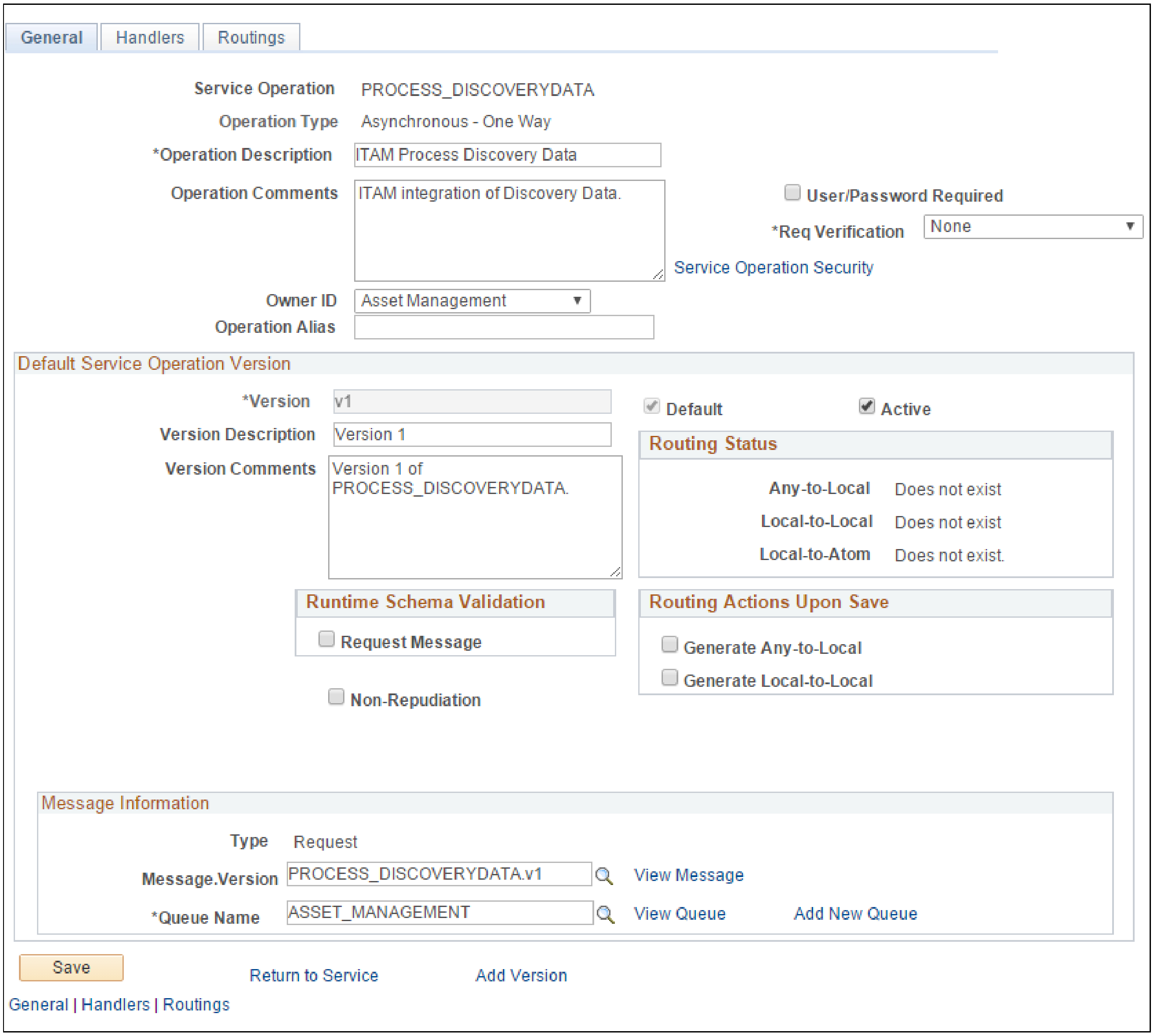
Task 18-2: Activating Service Operations

To activate service operations:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
2. On the Service Operations search page, search for and select the service operation

PROCESS_DISCOVERYDATA.

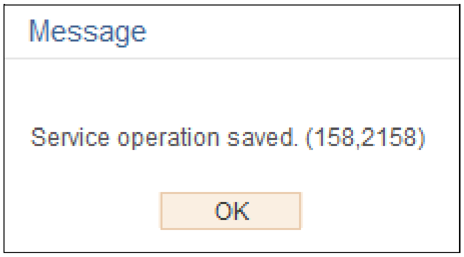
3. On the Service Operations - General page, verify that the Active check box is selected, as shown in the following example:



Service Operations: General page

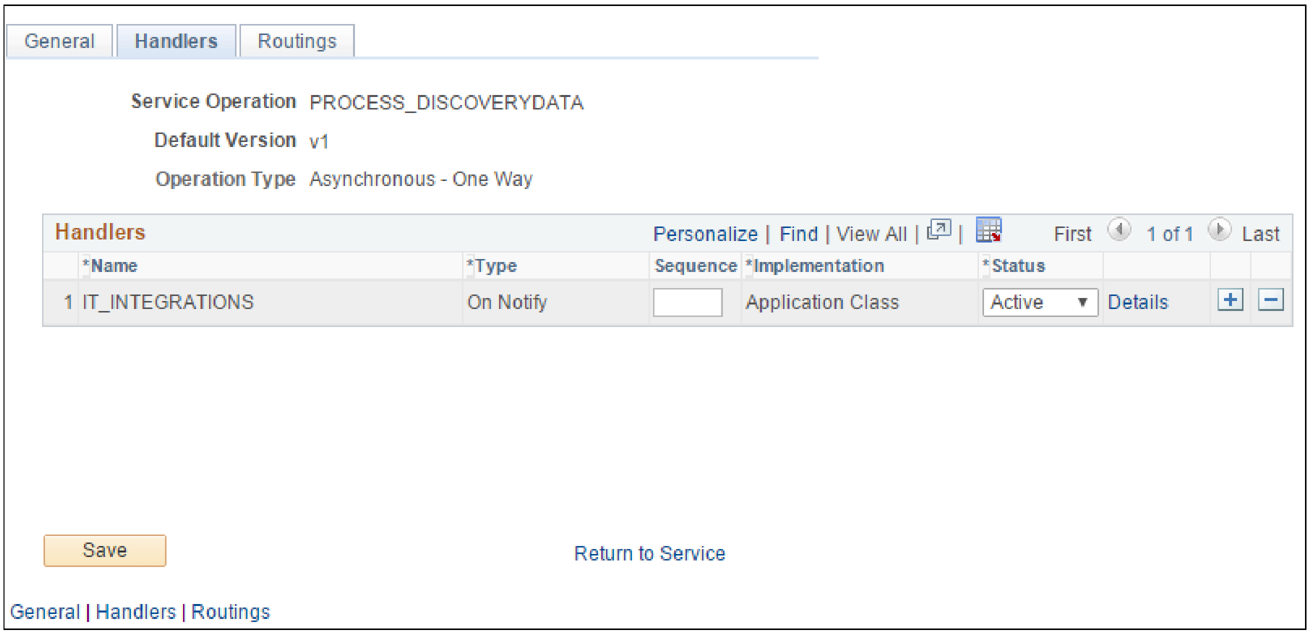
4. Click Save.

5. The message "Service operation saved" displays, as shown in the following example:



Service Operation: Saved Message page

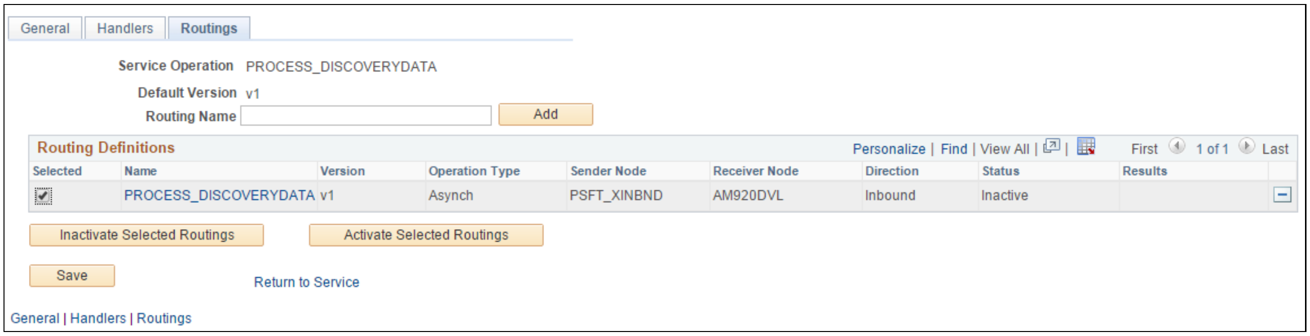
6. Click OK.
7. On the General page, select the Handlers tab to access the Handlers page, as shown in the following example:



Service Operations: Handlers page

8. On the Handlers page, in the Handlers group box, select *Active* from the Status drop-down list box.
9. Click Save.

10. Select the Routings tab and access the Routings page, as shown in the following example:



Service Operations: Routings page

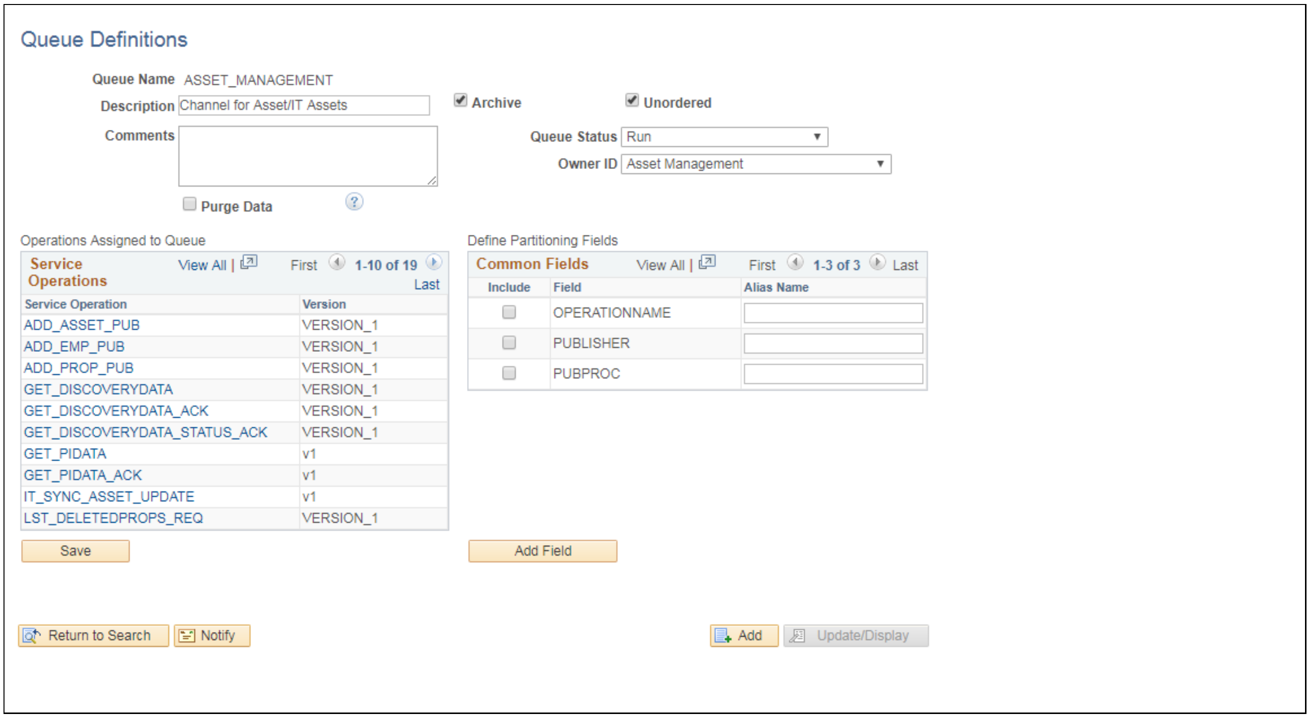
11. On the Routings page, select the check box for the routing.
12. Click the Activate Selected Routings button.
13. Click Save.

Task 18-3: Managing Queue Status

To run the message channel:

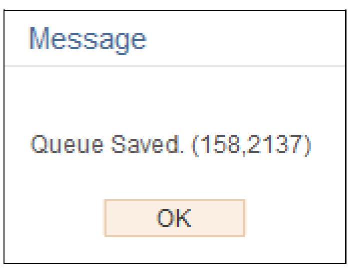
1. Select PeopleTools, Integration Broker, Integration Setup, Queues.
2. On the Queues search page, search for and select the queue name *ASSET_MANAGEMENT*.
3. On the Queue Definitions page, in the Queue Status field, verify that Run is selected.

4. If the Queue Status is paused, select *Run* from the Queue Status drop-down list box, as shown in the following example:



Queue Definition

5. Click Save.
6. The message "Queue Saved" displays, as shown in the following example:



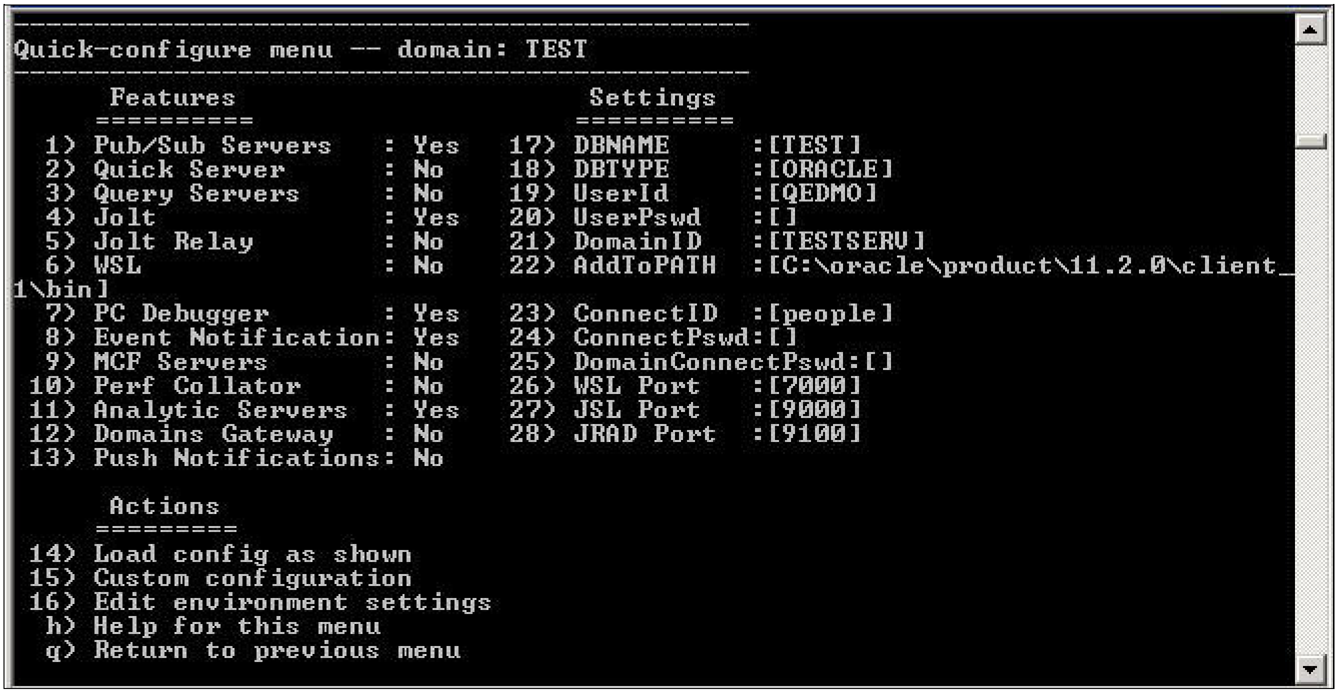
Queue Saved Message

7. Click OK.

Task 18-4: Activating the Domain for Asynchronous Messaging

Asynchronous message handling in the PeopleSoft system is different from synchronous message handling. In the asynchronous mode, the system dumps a message into a queue and a message handler picks up the message and then gives it to the message dispatcher. The dispatcher in turn delivers the message to the target node. To enable message handler and dispatcher, verify that your domain has publish/subscribe servers configured in psadmin.

Set Pub/Sub servers to *Yes* as shown in the following example:



PSADMIN page

Note. PSADMIN configuration supports asynchronous messaging. After you start your application server you see two new processes—one for Message Handler, and one for Message Dispatcher.

After you configure your application server, you must activate your domain through PeopleSoft Pure Internet Architecture to ensure that the Handler and Dispatcher pick up your asynchronous messages.

Next, activate the local domain.

See the "Appendix: Applying Common Installation Instructions," Activating the Domain for instructions.

This completes the setup for PeopleSoft Asset Management with Network Inventory Discovery Systems.

See the product documentation for PeopleSoft FSCM: Asset Management, "Working with the IT Asset Inventory Tool," for more information about this integration.

Chapter 19

Configuring eMail URLS in PeopleSoft SCM Applications

This chapter discusses:

- Configuring eMail URLs
- Setting Up Pagelets
- Granting Access to Navigation Pages

Task 19-1: Configuring eMail URLs

This section discusses:

- Understanding eMail Configuration
- Configuring eMail URLs for Item Loader Exceptions
- Configuring eMail URLs for Supplier Facing Applications
- Configuring eMail URLs for PeopleSoft eBill Payment

Understanding eMail Configuration

Some products in PeopleSoft Supply Chain Management (SCM) can send out email notifications containing web addresses (URLs) that enable your employees and external parties to link back to your website. For emails to contain the correct embedded URLs to PeopleSoft Inventory, PeopleSoft Purchasing, and PeopleSoft eProcurement pages, you must edit the URL as discussed in this section.

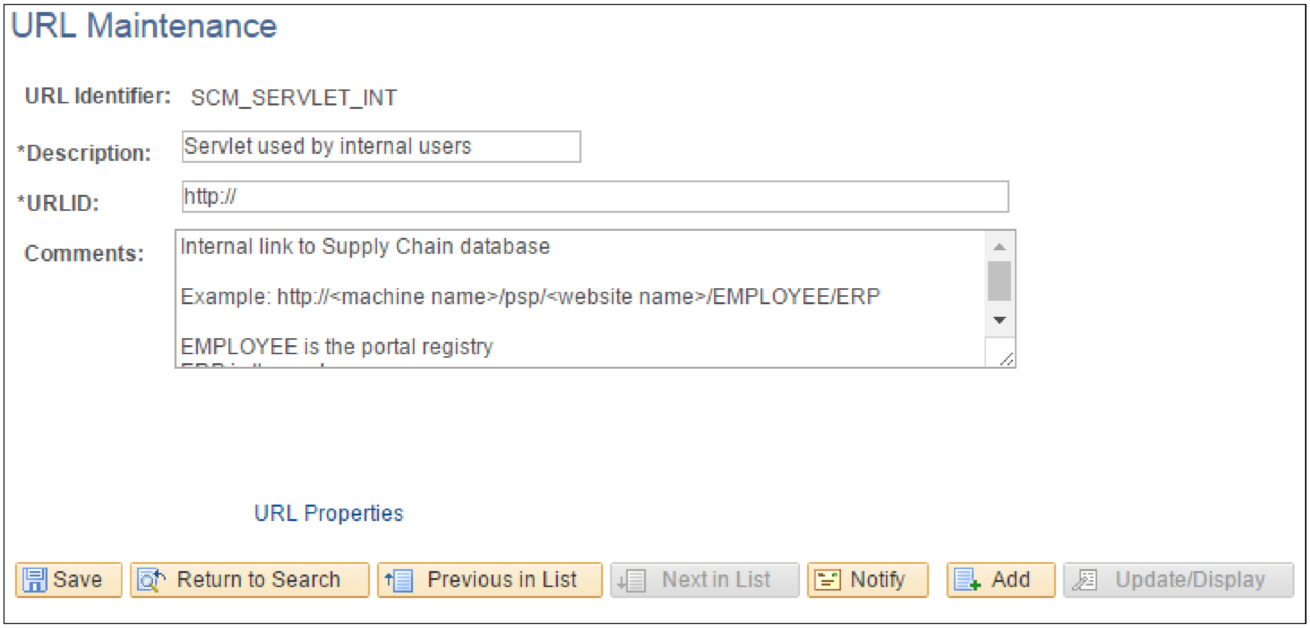
Task 19-1-1: Configuring eMail URLs for Item Loader Exceptions

You must modify SCM_SERVLET_INT to point to an internal server that you use to access the PeopleSoft SCM database. This URL creates standard PeopleSoft Internet Architecture links for internal users, such as employees, to access pertinent components and pages.

To set up the URL:

1. Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
2. On the URL search page, search for the URL identifier *SCM_SERVLET_INT*.

3. On the URL Maintenance page, in the URL field, edit the URL to point to an internal server to access the PeopleSoft Supply Chain Management database, as shown in the following example:



URL Maintenance page for SCM_SERVLET_INT

4. Click Save.

Task 19-1-2: Configuring eMail URLs for Supplier Facing Applications

The information in this section applies to PeopleSoft eSupplier Connection, PeopleSoft Collaborative Supply Management, PeopleSoft Supplier Contract Management, PeopleSoft Strategic Sourcing, PeopleSoft Services Procurement, and PeopleSoft Supplier Registration.

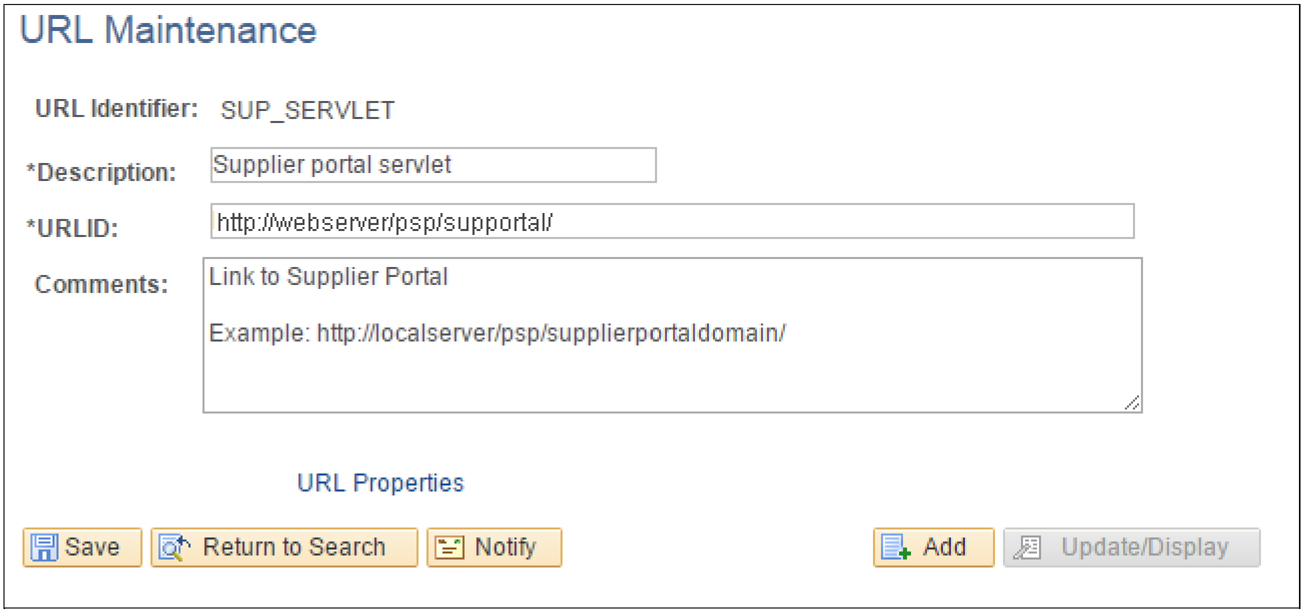
You must modify EMP_SERVLET, SUP_SERVLET, and SUP_OB_INVITE to point to the correct servers that you plan to use to access the PeopleSoft SCM database. These URLs are a requirement when you are not using an Enterprise Portal, as there is no other way to identify the different web servers used for the Employee or Supplier side.

To set up these URLs:

1. Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
2. On the URL search page, search for the URL identifier *SUP_SERVLET*.

3. On the URL Maintenance page, in the URL field, edit the URL to point to an EXTERNAL server to access the PeopleSoft Supply Chain Management database.

   That is, the server that the suppliers use to sign in to the SUPPLIER registry, as shown in the following example:

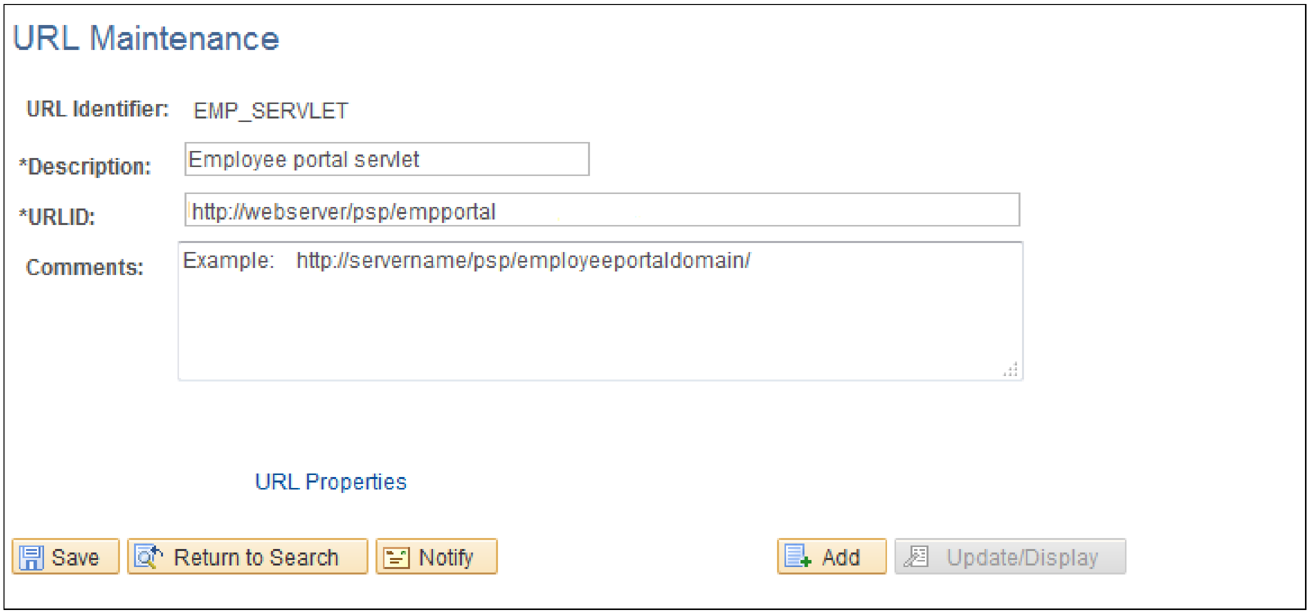


URL Maintenance page for SUP_SERVLET

4. Click Save.
5. Click Return to Search.
6. On the URL search page, search for the URL identifier *EMP_SERVLET*.

7. On the URL Maintenance page, in the URL field, edit the URL to point to an INTERNAL server to access the PeopleSoft Supply Chain Management database.

   That is, the server that the employees use to sign in to the EMPLOYEE registry, as shown in the following example:

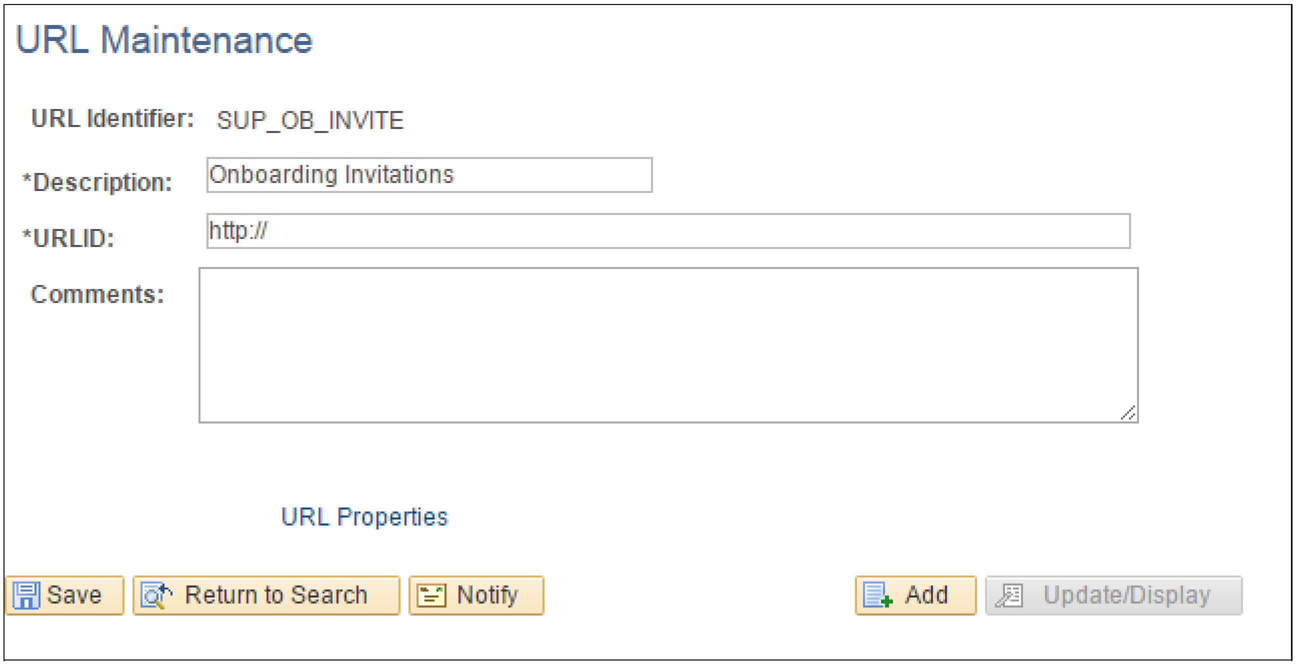


URL Maintenance page for EMP_SERVLET

8. Click Save.
9. Click Return to Search.
10. On the URL search page, search for the URL identifier *SUP_OB_INVITE*.

11. On the URL Maintenance page, in the URL field, edit the URL to point to an EXTERNAL server to access the PeopleSoft Supply Chain Management database.

    That is, the server that the potential suppliers use to sign in to the SUPPLIER registry, as shown in the following example:



URL Maintenance page for SUP_OB_INVITE

12. Click Save.

Task 19-1-3: Configuring eMail URLs for PeopleSoft eBill Payment

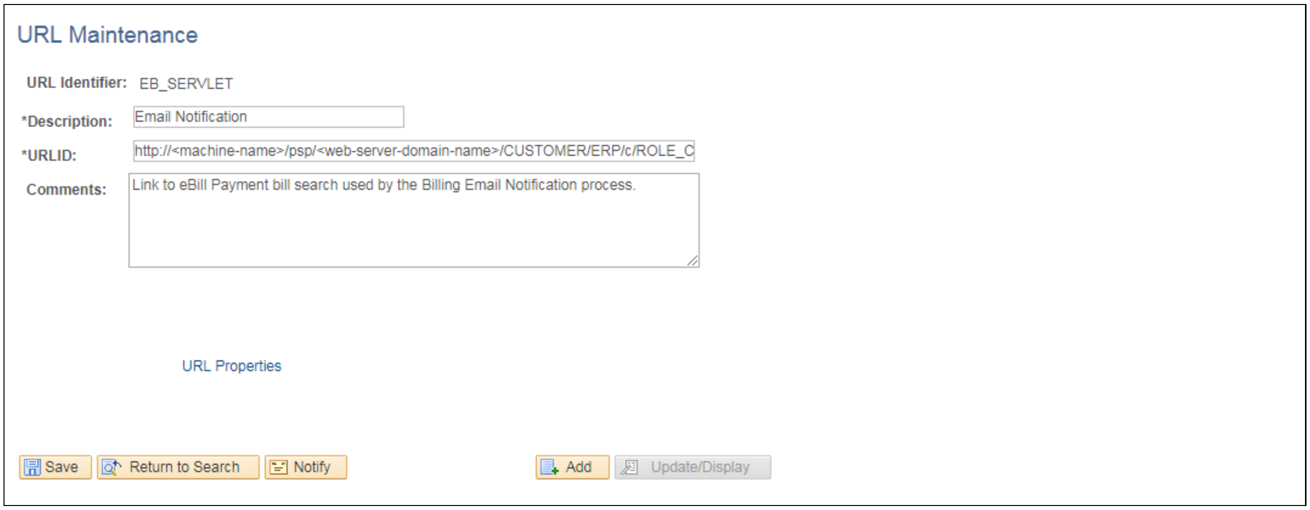
You must modify the EB_SERVLET to point to the correct server that you plan to use to access the PeopleSoft SCM database for the CUSTOMER registry. This is necessary to enable PeopleSoft Billing to generate the correct link to the PeopleSoft eBill Payment components.

To set up the URL:

1. Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
2. On the URL search page, search for the URL identifier *EB_SERVLET*.

3. On the URL Maintenance page, edit the URL to point to an EXTERNAL server to access the PeopleSoft Supply Chain Management database.

   That is, the server that your customers use to sign in to the CUSTOMER registry, as shown in the following example:



   URL Maintenance page for EB_SERVLET

4. Click Save.

Task 19-2: Setting Up Pagelets

This section discusses:

- Accessing Pagelets
- Enabling Pagelet Creation and Access with Portal Utilities

Task 19-2-1: Accessing Pagelets

You can access pagelets within the PeopleSoft 9.2 Supply Chain Management application databases. Use these instructions to apply scripts to your database to allow access to the pagelet configuration homepage.

Note. You must complete the following steps for both the System (SYS) and Demo (DMO) databases, unless otherwise indicated.

To add, remove, or change the layout of the homepage, you must grant the homepage personalization security access to all non-guest users. To update the homepage personalization permission list, use PeopleSoft Data Mover to run the `PORTAL_HP_PERS.DMS` script.

To add the Portal User role to the user IDs, use PeopleSoft Data Mover to run the `PORTAL_ADD_ROLE.DMS` script. You can find both scripts in *PS_APP_HOME*\scripts.

Note. You should grant the PAPP_USER role to all new user IDs for access to the homepage personalization. After you run this script, you should manually remove the role PAPP_USER from any GUEST User ID, since the GUEST user should not be personalizing the common homepage.

Task 19-2-2: Enabling Pagelet Creation and Access with Portal Utilities

Perform this task only if you are licensed for PeopleSoft Supply Chain Portal Pack or PeopleSoft Portal Solutions.

Use PeopleSoft Data Mover to run the `EOPP_PORTAL_PACK.DMS` script in *PS_APP_HOME*\scripts. This script enables the creation and viewing of pagelets using the Enterprise Components Portal Utilities.

Task 19-3: Granting Access to Navigation Pages

To access the navigation pages, you must grant security to the Navigation Page IScripts to all users. To add the EOPP_USER role to all users, use PeopleSoft Data Mover to run the `EOPP_ADD_ROLE.DMS` script in *PS_APP_HOME*\scripts.

Note. When you create a new user ID, you should add the EOPP_USER role to the new user ID.

Chapter 20

Setting Up PeopleSoft Supplier Relationship Management Applications

This chapter discusses:

- Reviewing the PeopleSoft 9.2 Supplier Contract Management Setup
- Granting Security in PeopleSoft Fluid Requisition
- Setting Up the PeopleSoft Search Framework Search Engine in Fluid Requisition

Reviewing the PeopleSoft 9.2 Supplier Contract Management Setup

This section applies to PeopleSoft Supplier Contract Management. To use PeopleSoft Supplier Contract Management, you must set up a database or FTP file attachment server as documented in the task Upgrading File Attachment, and have Microsoft Word 2007 or higher installed.

Review the following setup tasks:

- Setup of a Microsoft Word template.
- Optional setup for individual clients to allow certain users to look up clauses and bind variables in the PeopleSoft database from within Microsoft Word using Microsoft Research task pane functionality.
- Optional setup to allow users to perform server side compares of Microsoft Word documents, and optional dispatch of contracts to suppliers in a .doc or .pdf format (versus the default .xml format).
- Optional installation setup for PeopleSoft Search Framework.
- Optional installation setup for workflow.
- Optional installation setup for contract syndication
- Optional setup that enables documents to use digital signatures like Adobe or Microsoft Word 2007 or higher versions.

See the product documentation for PeopleSoft FSCM: Supplier Contract Management for more information about the setup tasks.

Task 20-1: Granting Security in PeopleSoft Fluid Requisition

Understanding PeopleSoft Fluid Requisition

The PeopleSoft Fluid Requisition is based on Fluid Architecture and combined with a Component Interface. Fluid Architecture builds the front end display and the Component Interface handles the bulk of the business logic at the back end.

Use the Permission List EPPV1000 from PeopleSoft Pure Internet Architecture to grant security to PeopleSoft Fluid Requisition 9.2 objects.

Permission lists are tied to roles. Users are then tied to those roles so by granting permission to an object in a permission list, any user assigned to a role that is tied to that permission list is granted permission.

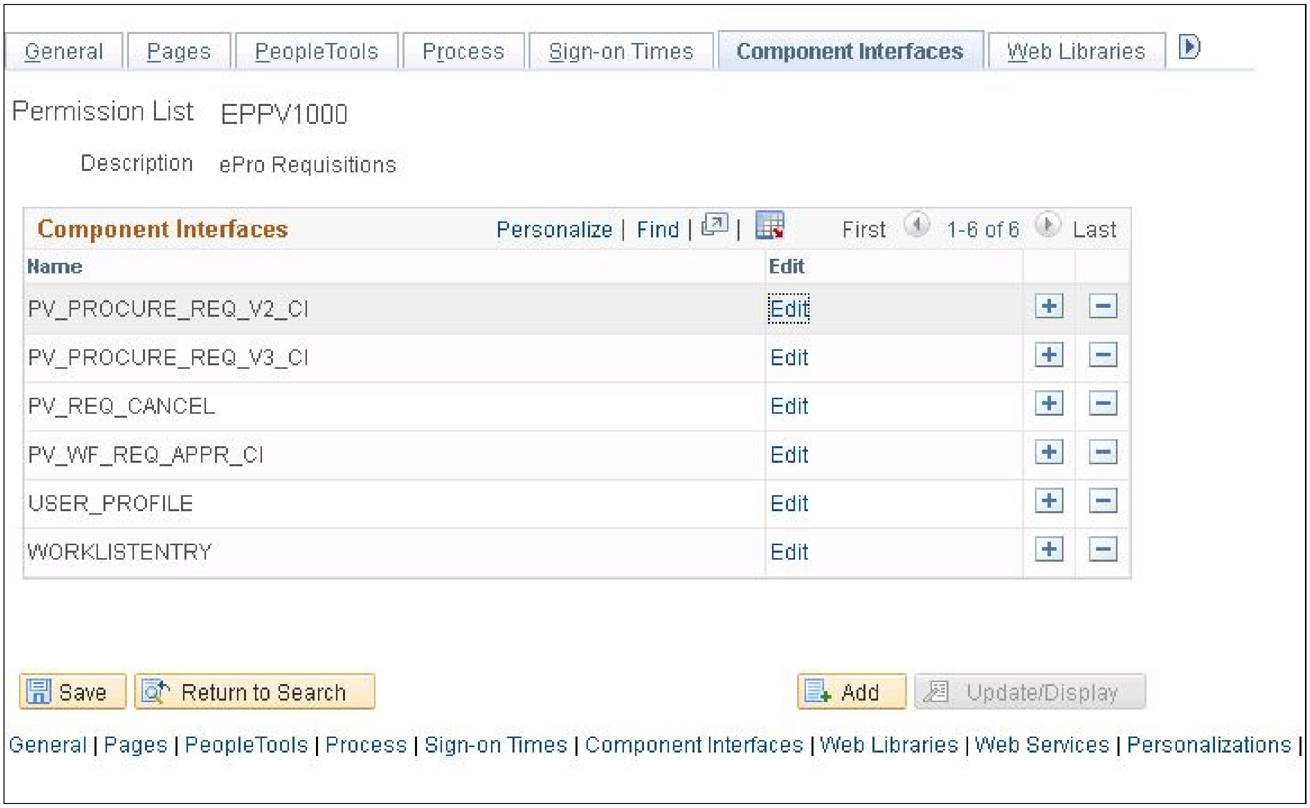
Task 20-1-1: Granting Access to Component Interfaces

To grant permission to permission lists, navigate to the PeopleTools Permission Lists component:

1. Select PeopleTools, Security, Permissions & Roles, Permission Lists.
2. Search for and select the Permission List EPPV1000.
3. Select the Component Interfaces tab.

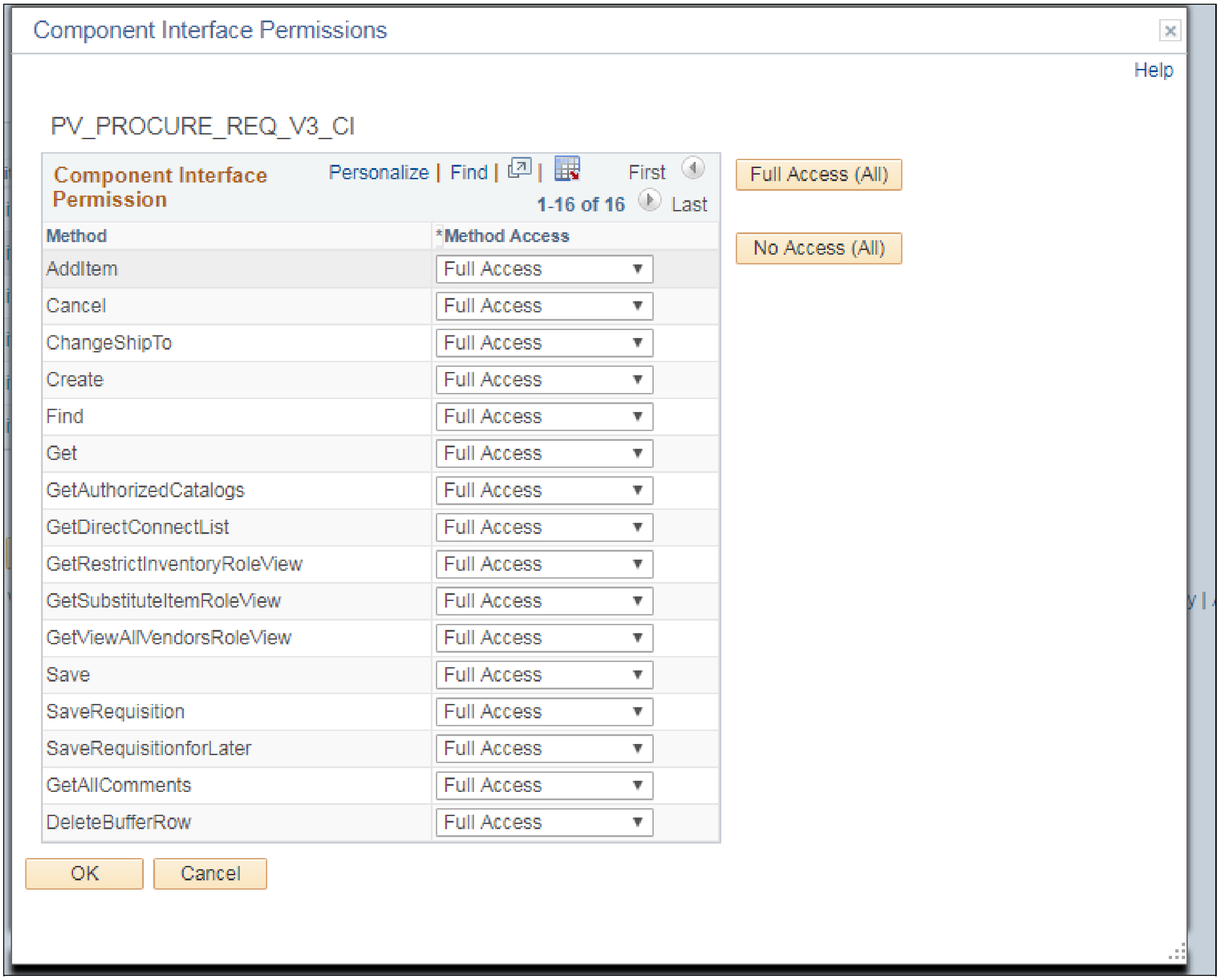
   Fluid Requisition requires the use of Component Interface PV_PROCURE_REQ_V3_CI.

4. Select Edit for Component Interface PV_PROCURE_REQ_V3_CI in the Component Interfaces tab as shown in the following example:



Permission Lists page: Component Interfaces tab for PV_PROCURE_REQ_V3_CI

5. Grant Full access for all the methods in the list as shown in the following example:



Component Interface Permissions page for PV_PROCURE_REQ_V3_CI

6. Click OK.

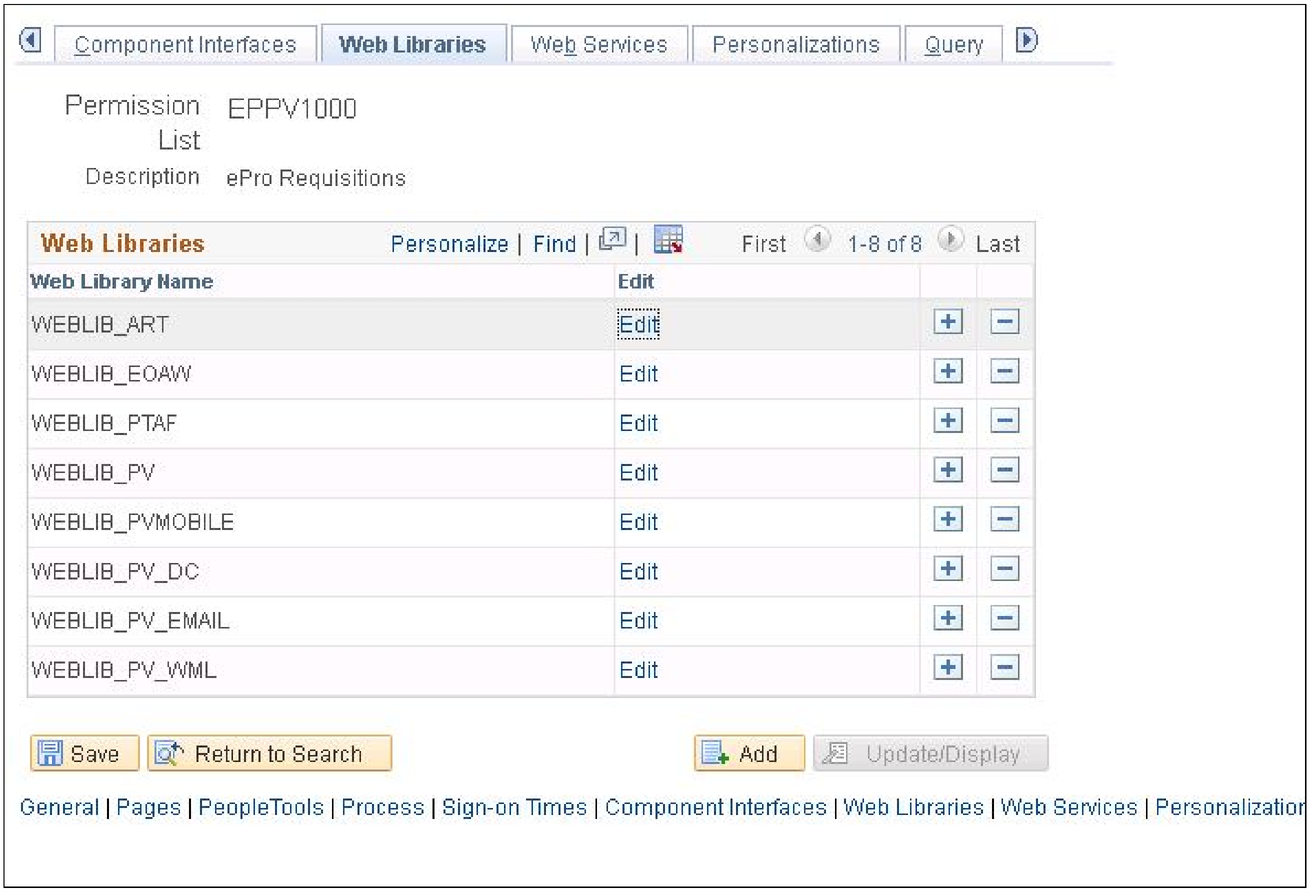
Task 20-1-2: Granting Access to Web Libraries (IScript Functions)

Fluid Requisition also requires the use of various IScript functions which are present inside Web Libraries. IScript functions are PeopleSoft records that start with prefix IScript_.

To grant permission to Web Libraries:

1. Navigate to PeopleTools, Security, Permissions & Roles, Permission Lists.
2. Search for and select the Permission List EPPV1000.
3. On the Permission Lists page, select the Web Libraries tab.

4. Select the Edit link for the WEBLIB_PV record as shown in the following example:



Permission Lists page: Web Libraries tab for WEBLIB_PV

Note. Once one of these records is added to the Web Libraries tab of the Permission List component, all functions that contain the prefix in any field is automatically displayed in the Web Library permissions secondary page.

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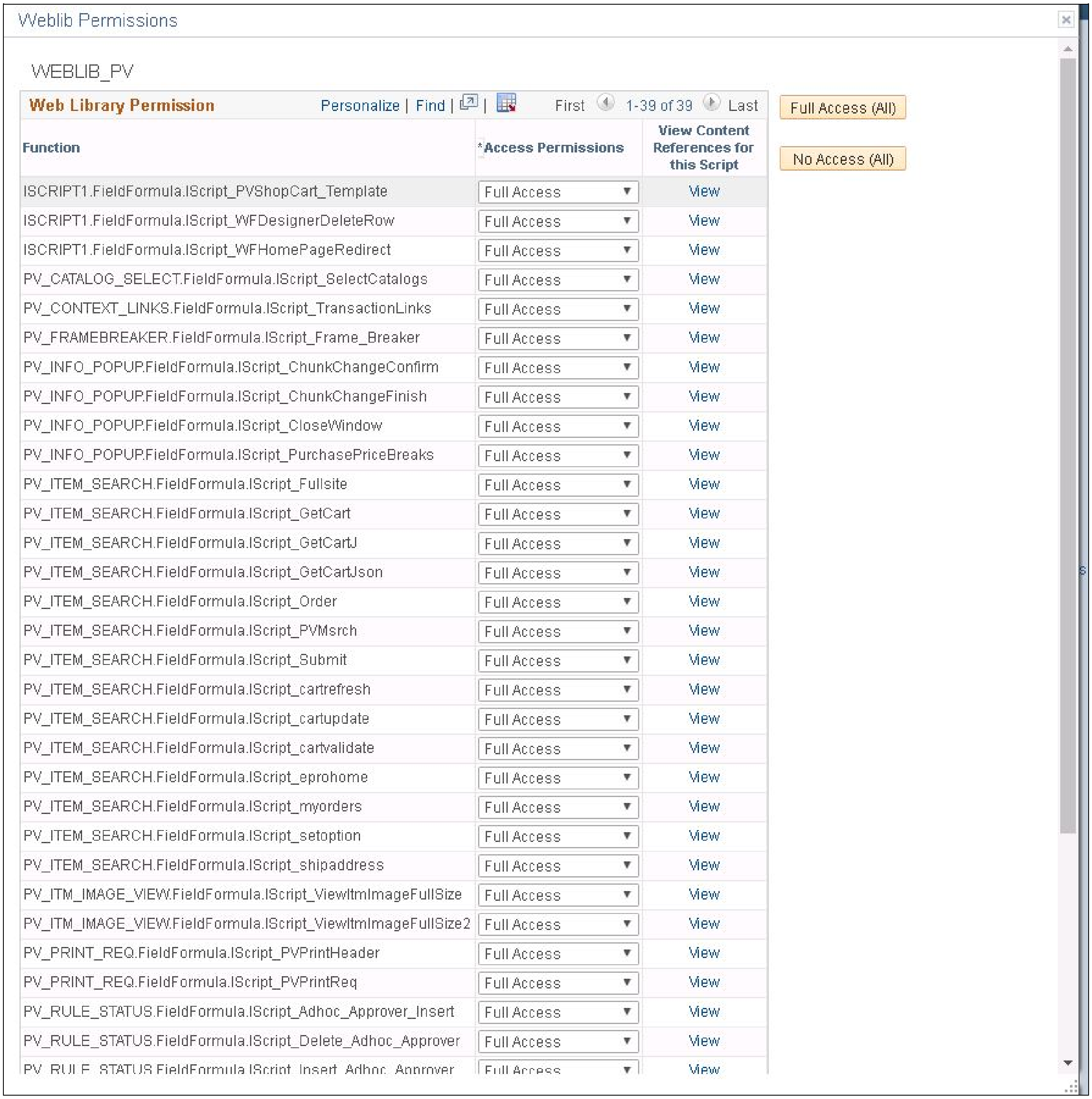
5. Grant full access to all the IScript functions as shown in the following example:



Weblib Permissions

WEBLIB_PV

Web Library Permission — Personalize | Find | First 1-39 of 39 Last

Full Access (All)

No Access (All)

Function	*Access Permissions	View Content References for this Script
ISCRIPT1.FieldFormula.IScript_PVShopCart_Template	Full Access	View
ISCRIPT1.FieldFormula.IScript_WFDesignerDeleteRow	Full Access	View
ISCRIPT1.FieldFormula.IScript_WFHomePageRedirect	Full Access	View
PV_CATALOG_SELECT.FieldFormula.IScript_SelectCatalogs	Full Access	View
PV_CONTEXT_LINKS.FieldFormula.IScript_TransactionLinks	Full Access	View
PV_FRAMEBREAKER.FieldFormula.IScript_Frame_Breaker	Full Access	View
PV_INFO_POPUP.FieldFormula.IScript_ChunkChangeConfirm	Full Access	View
PV_INFO_POPUP.FieldFormula.IScript_ChunkChangeFinish	Full Access	View
PV_INFO_POPUP.FieldFormula.IScript_CloseWindow	Full Access	View
PV_INFO_POPUP.FieldFormula.IScript_PurchasePriceBreaks	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_Fullsite	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_GetCart	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_GetCartJ	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_GetCartJson	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_Order	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_PVMsrch	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_Submit	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_cartrefresh	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_cartupdate	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_cartvalidate	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_eprohome	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_myorders	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_setoption	Full Access	View
PV_ITEM_SEARCH.FieldFormula.IScript_shipaddress	Full Access	View
PV_ITM_IMAGE_VIEW.FieldFormula.IScript_ViewItmImageFullSize	Full Access	View
PV_ITM_IMAGE_VIEW.FieldFormula.IScript_ViewItmImageFullSize2	Full Access	View
PV_PRINT_REQ.FieldFormula.IScript_PVPrintHeader	Full Access	View
PV_PRINT_REQ.FieldFormula.IScript_PVPrintReq	Full Access	View
PV_RULE_STATUS.FieldFormula.IScript_Adhoc_Approver_Insert	Full Access	View
PV_RULE_STATUS.FieldFormula.IScript_Delete_Adhoc_Approver	Full Access	View
PV_RULE_STATUS.FieldFormula.IScript_Insert_Adhoc_Approver	Full Access	View

Weblib Permissions page for WEBLIB_PV

6. Repeat steps 1-4 for Web Library WEBLIB_PVMOBILE.

   Grant Full Access to the following:

   - PV_ISCRIPT_LIB.FieldFormula.IScript_AjaxText
   - PV_ISCRIPT_LIB.FieldFormula.IScript_ChangeRequestInfo

7. Repeat steps 1-4 for Web Library WEBLIB_PV_DC.

   Grant Full Access to the following:

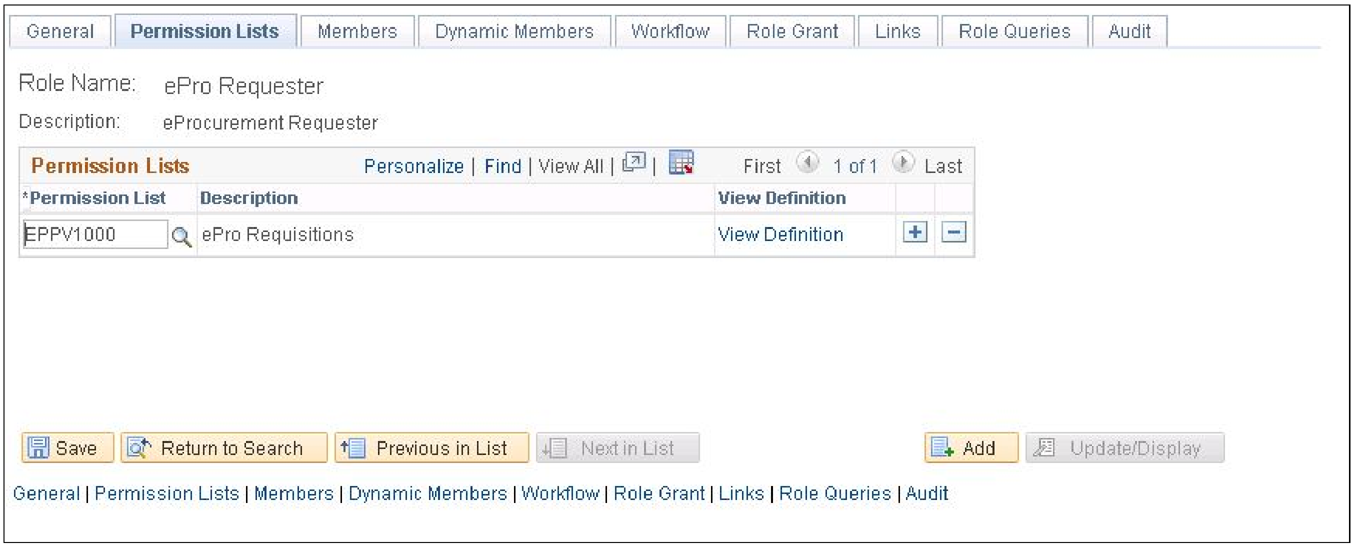
   - PV_ISCRIPT_LIB.FieldFormula.IScript_DCCatcher

- PV_ISCRIPT_LIB.FieldFormula.IScript_DirectConnect

Task 20-1-3: Granting Access to Users

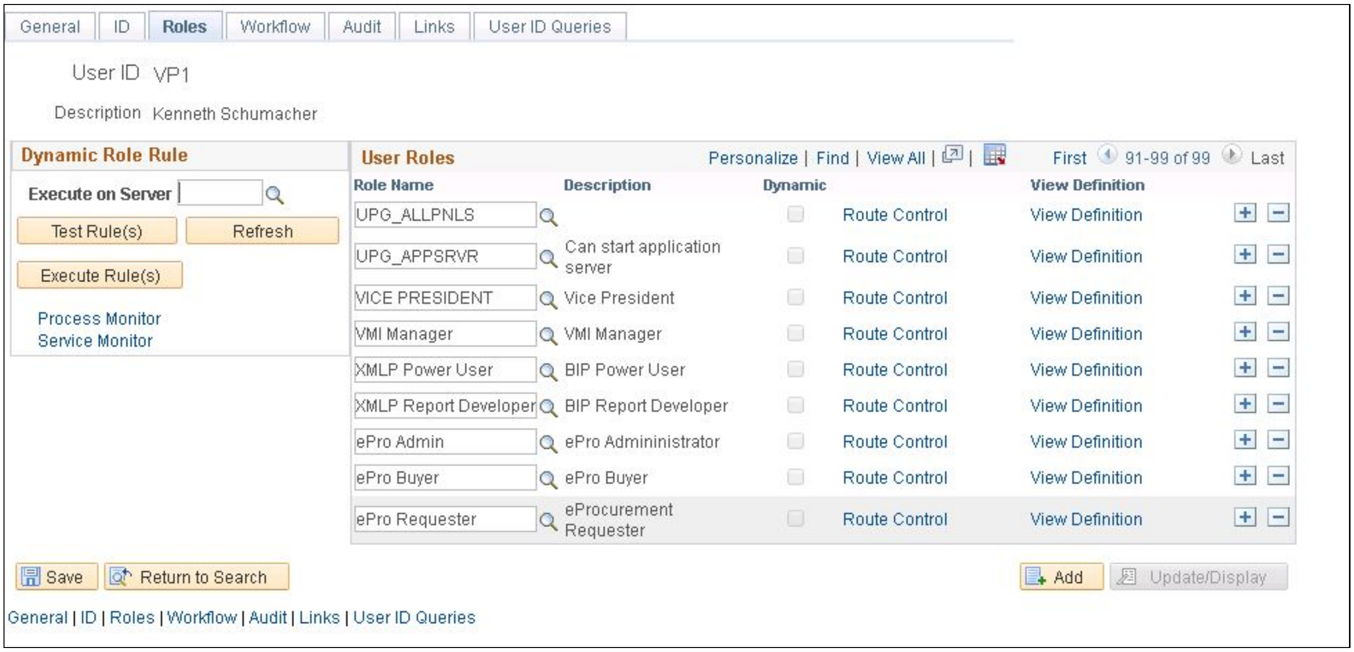
The Fluid Requisition component and its Permission List EPPV1000 has already been assigned to roles ePro Requester and ePro Novice Requester in order to access the Fluid Requisition application.

You can also assign the Permission List EPPV1000 to any roles that would grant Fluid Requisition permissions to any user belonging to the assigned roles. The following example shows that the Permission List EPPV1000 is assigned to the role ePro Requester:



Roles page: Permission Lists tab for Role ePro Requester

You can navigate to the User Profiles page to see the various roles to which the user belongs, as shown in the following example:



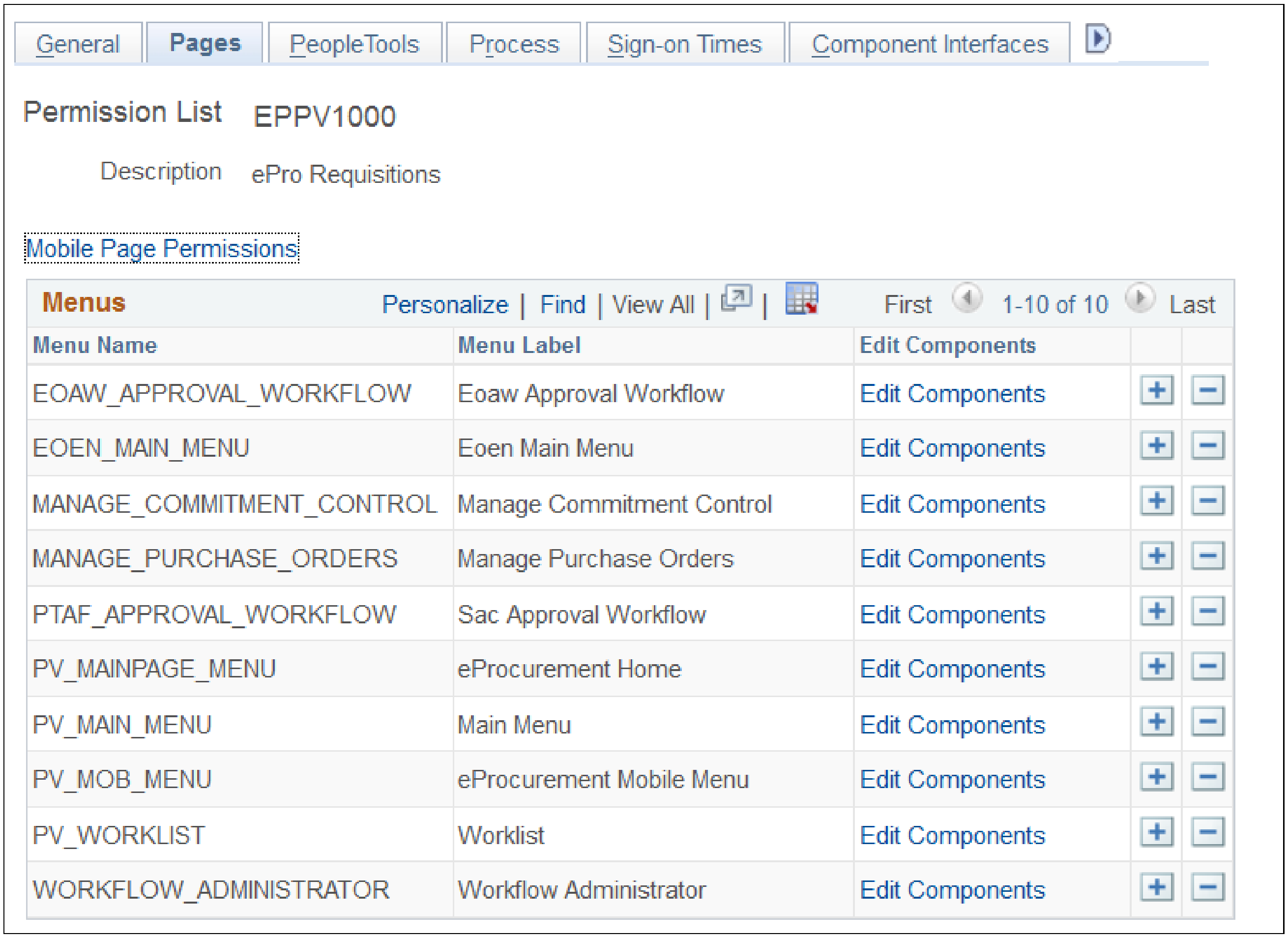
User Profiles page: Roles tab

Task 20-1-4: Granting Access to Menu and Components

To grant permission to permission list, navigate to the PeopleTools Permission Lists component:

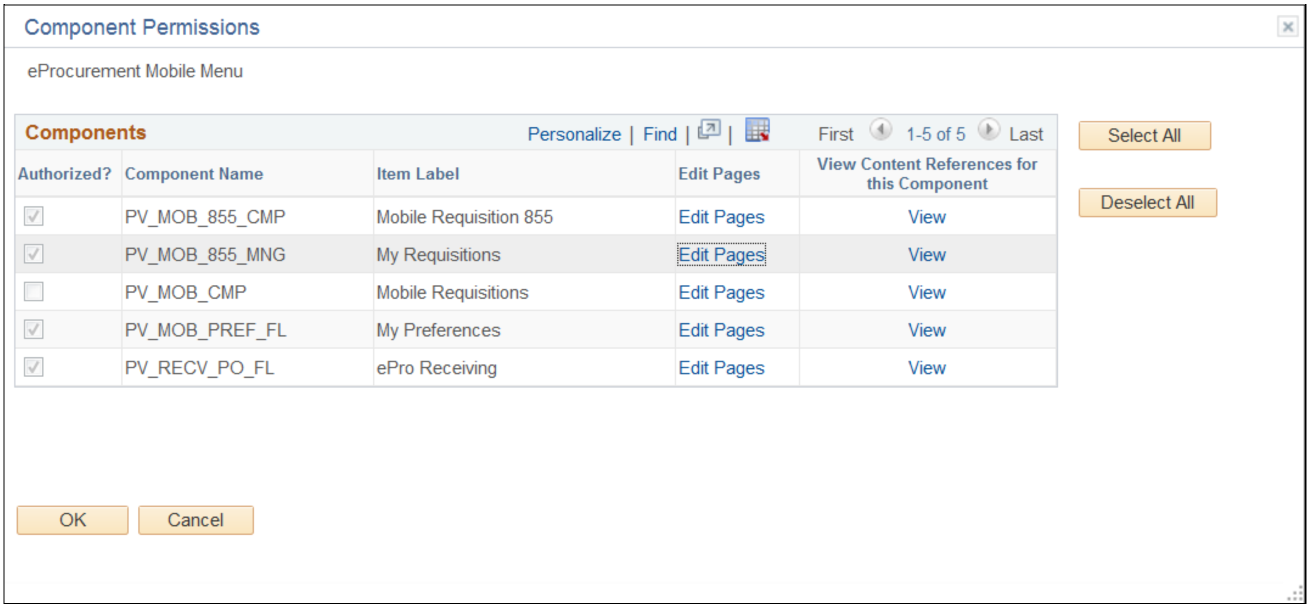
1. Select PeopleTools, Security, Permission & Roles, Permission Lists.
2. Search for and select the Permission List *EPPV1000.*
3. Select the Pages tab Fluid Requisition requires the use of Menu PV_MOB_MENU.

4. Select Edit Components hyperlink for Menu PV_MOB_MENU on Pages tab as shown in the following example:



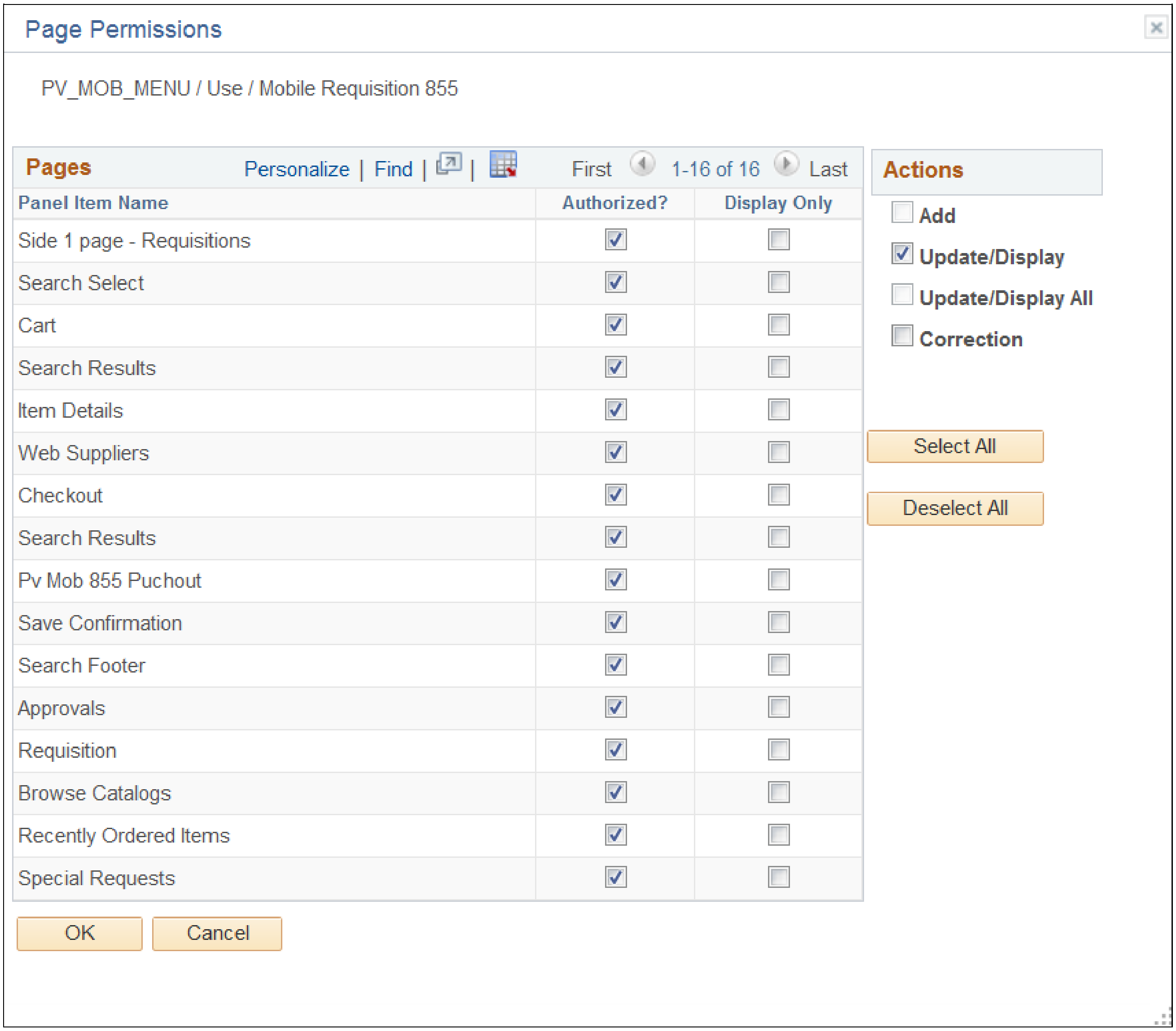
Permission Lists page: Pages tab for PV_MOB_MENU Menu

5. Select Edit Pages hyperlink for Component Name PV_MOB_855_CMP as shown in the following example:



Component Permissions: Component Name PV_MOB_855_CMP

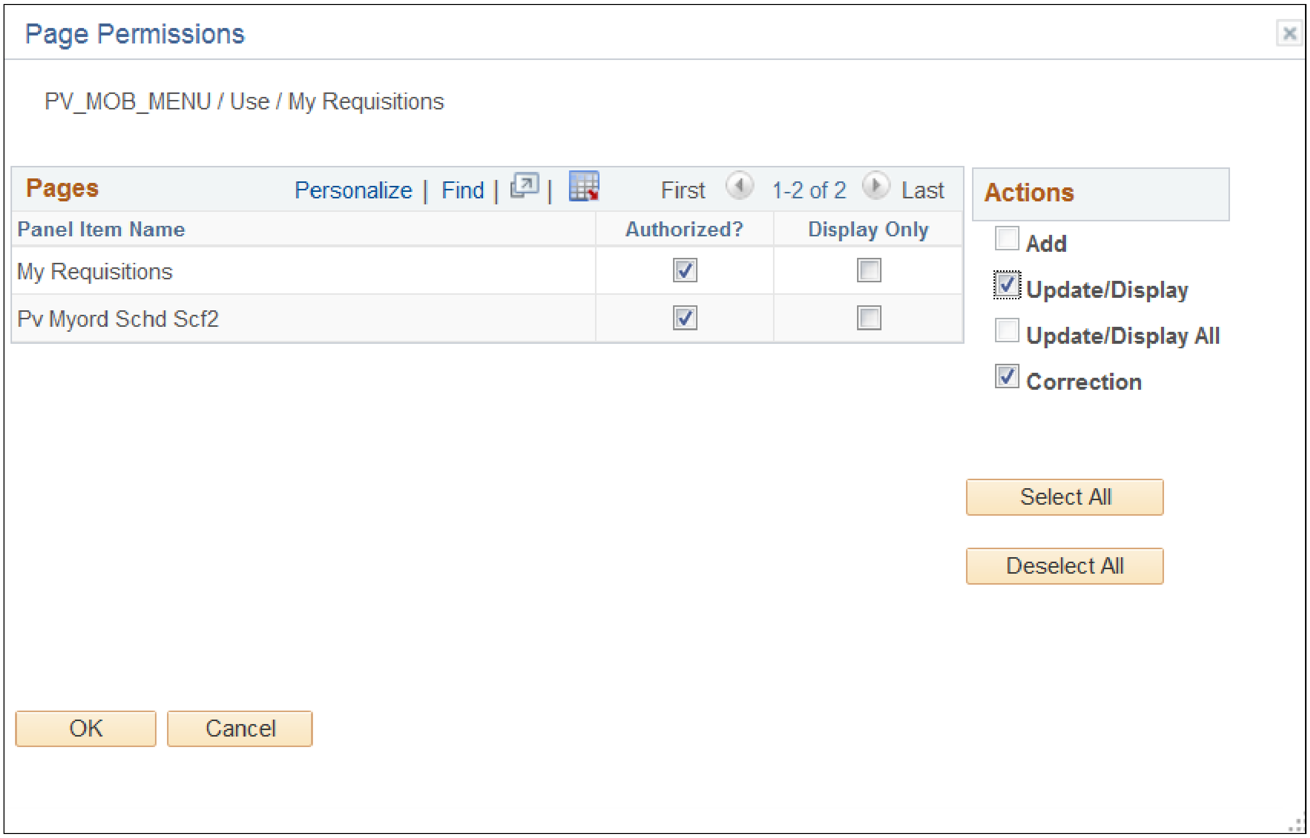
6. Select All Actions as Authorized for the Pages in the List as shown in the following example:



Page Permission: Authorized

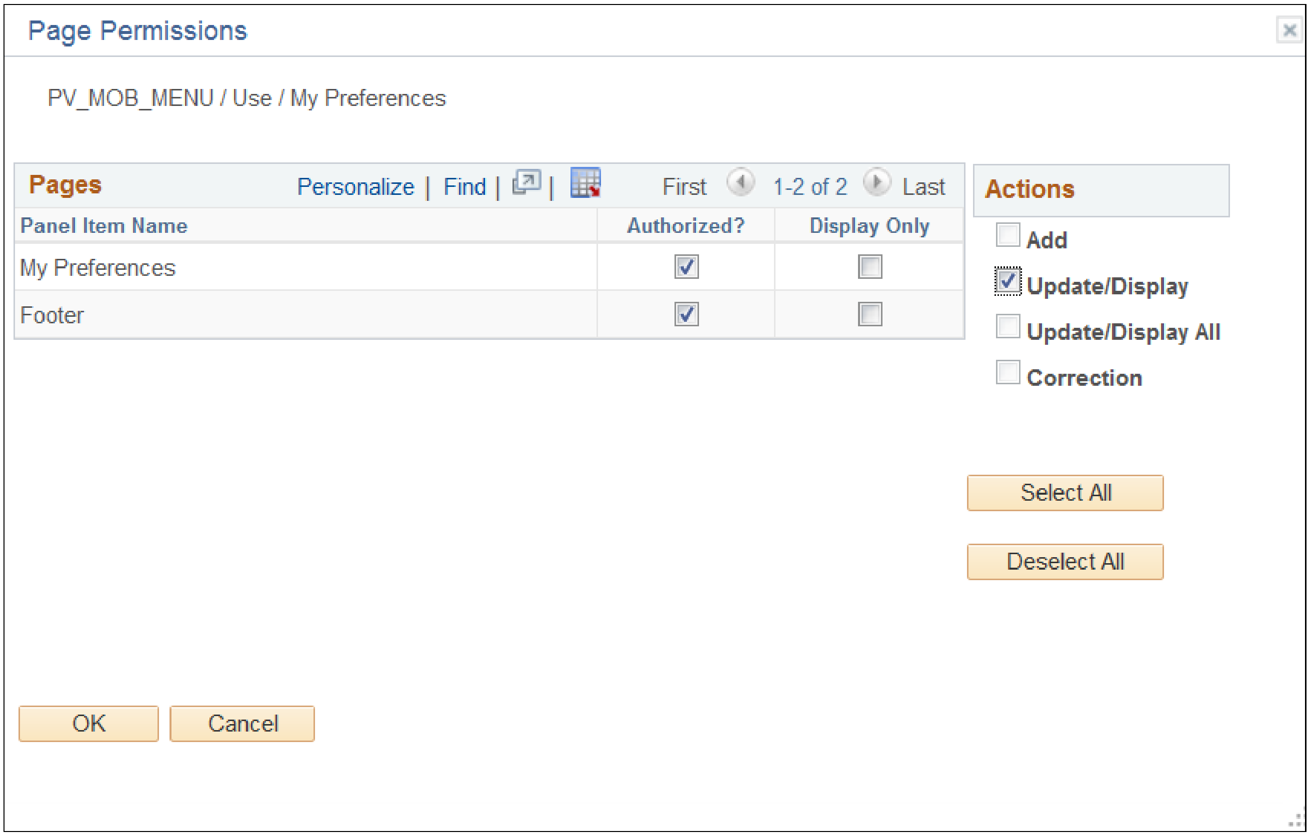
7. Click OK.

8. Repeat Steps 5-7 to select Edit Pages hyperlink for Component Name PV_MOB_855_MNG and Select All Actions.



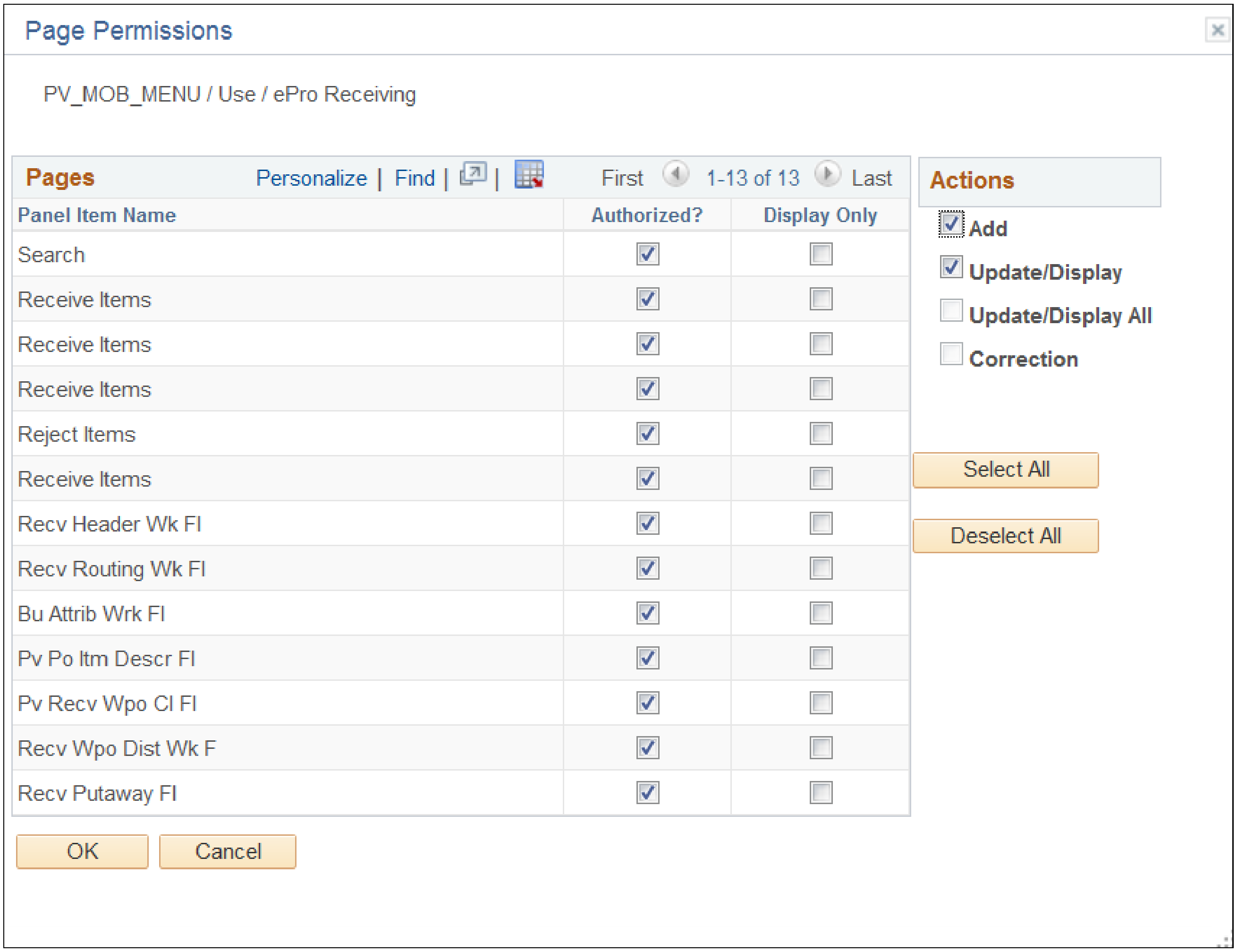
Page Permissions: Component Name PV_MOB_855_MNG

9. Repeat Steps 5-7 to select Edit Pages hyperlink for Component Name PV_MOB_PREF_FL and Select All Actions.



Page Permissions: Component Name PV_MOB_PREF_FL

10. Repeat Steps 5-7 to select Edit Pages hyperlink for Component Name PV_RECV_PO_FL and Select All Actions.



Page Permissions: Component Name PV_RECV_PO_FL

11. Click OK.
12. Click Save, to save Permission List page.

Task 20-2: Setting Up the PeopleSoft Search Framework Search Engine in Fluid Requisition

This section discusses:

- Understanding PeopleSoft Search Framework
- Indexing and Deploying Search Definitions
- Application Searching (Global Search) Security

Understanding PeopleSoft Search Framework

Review the chapter "Configuring Global Search Using PeopleSoft Search Framework" for setup of Search Framework search engines which need to be completely installed and operational prior to Fluid Requisition object deployment and indexing.

See *PeopleTools: Search Technology,* "Understanding PeopleSoft Search Framework."

Task 20-2-1: Indexing and Deploying Search Definitions

Fluid Requisition uses the following three Search Definitions:

- EP_PV_MASTERITEM_SD
- EP_PV_MASTERITEMVENDOR_SD
- EP_PV_EXPRESSITEMS_SD

All search definitions for eProcurement must be deployed. In addition to the preceding search definitions, search category EP_PV_MASTERITEMVENDOR_CAT must be deployed.

To deploy the search definitions and the search category:

1. Select PeopleTools, Search Framework, Administration, Deploy/Delete Object to display the Deploy Search Definitions page.
2. Select the three search definitions for eProcurement EP_PV_EXPRESSITEMS_SD, EP_PV_MASTERITEMVENDOR_SD, and EP_PV_MASTERITEM_SD, and click the Deploy button.

   Search definitions must be deployed prior to indexing.
3. Select the Deploy Search Category tab to display the Display Search Category page.
4. Select the search category EP_PV_MASTERITEMVENDOR_CAT, and click the Deploy button.

   Note. For global search, search category EP_CATALOG_ITEMS should also be deployed.

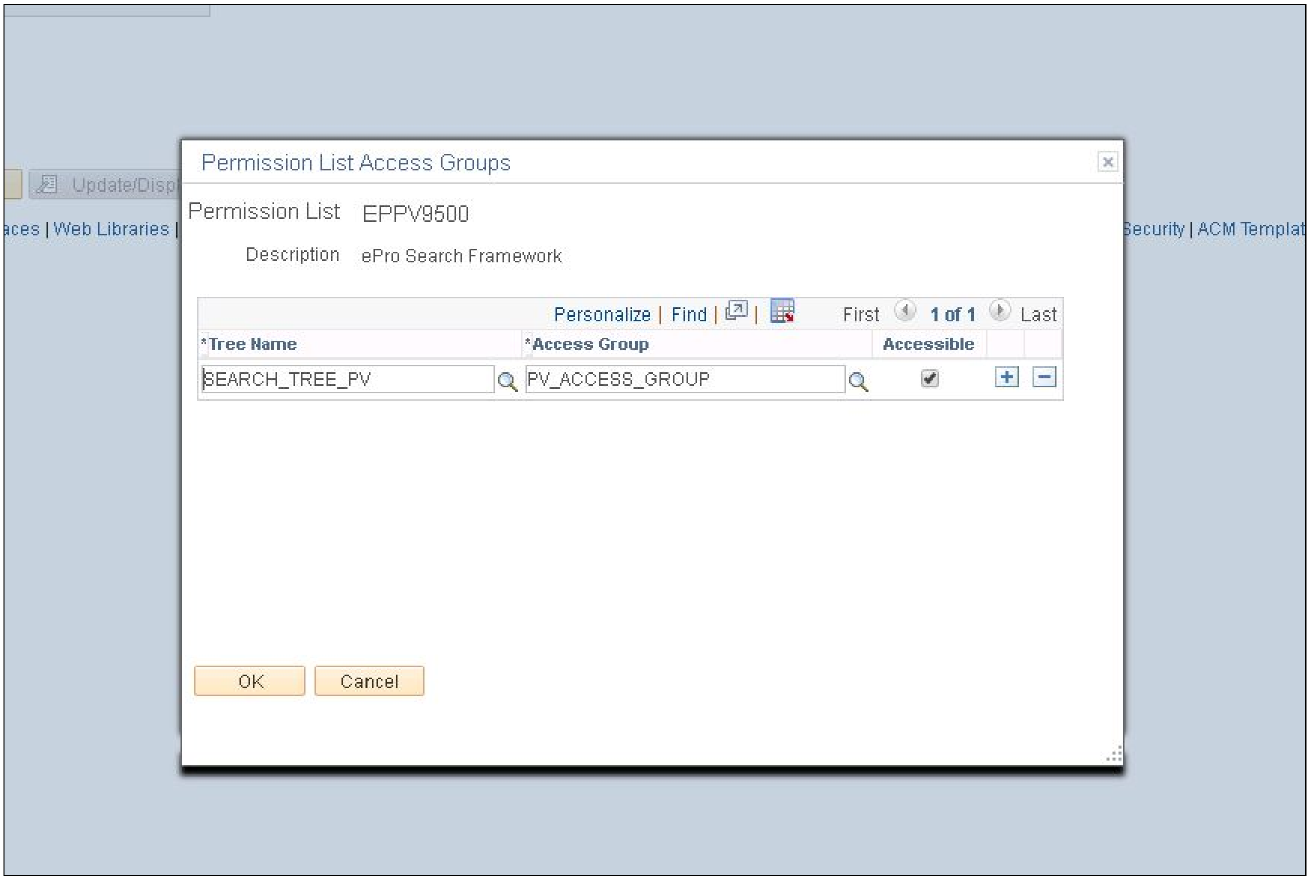
Before indexing the search definitions, verify that the user has been assigned to the Permission List EPPV9500.

This permission list is delivered with the role Search Query Administrator.

To verify:

1. Select PeopleTools, Security, Permissions & Roles, Permission Lists.
2. Search for and select the Permission List EPPV9500.
3. Select the Query tab.
4. Select the Access Group Permissions link.

5. The Permission List is connected to the access group PV_ACCESS_GROUP, which is a part of Query Access Tree SEARCH_TREE_PV, as shown in the following example:



Permission List Access Groups page for EPPV9500

Note. PV_ACCESS_GROUP contains all the views that are used by PeopleSoft Query in order to extract data in Oracle Elastic Search indexing.

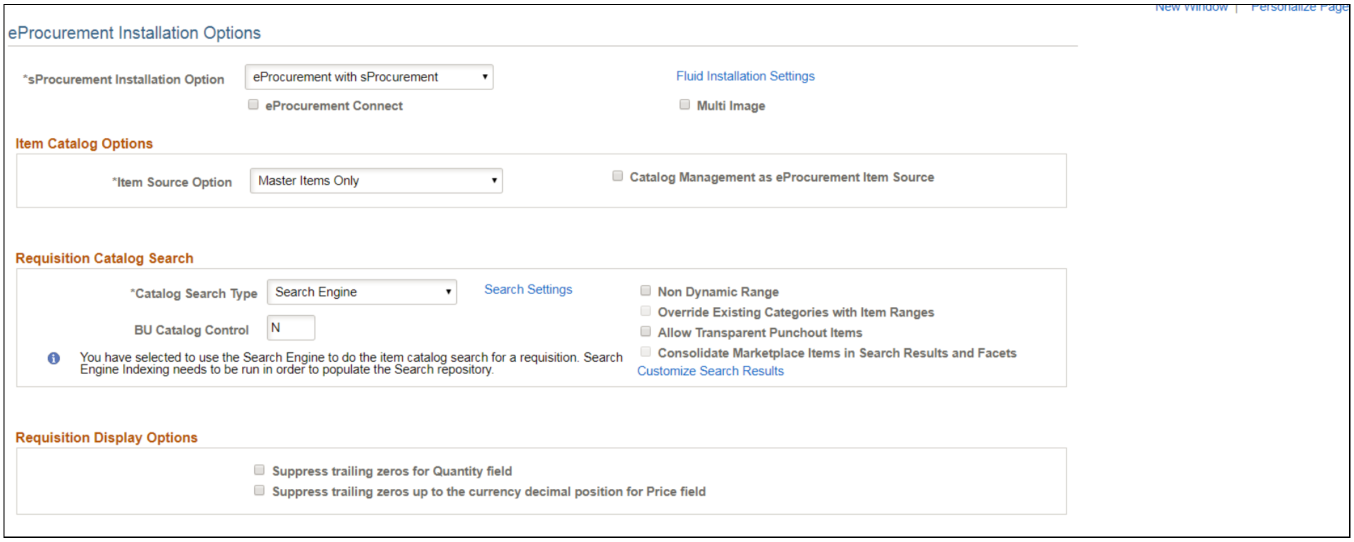
To index the eProcurement search definitions:

1. Select PeopleTools, Search Framework, Administration, Schedule Search Index.
2. Create a new run control ID.
3. Select Search Definition *EP_PV_MASTERITEMVENDOR_SD.*
4. Select Full Index as the type of index, for the initial run.
5. Select Base Language as the language option. If multi-language for database is enabled, then select All Languages to index multiple languages.
6. Click Run to start the process.
7. On the Process Scheduler Request page, click OK.
8. On the Process Monitor page, verify that the process runs to success.

Repeat steps 1 through 8 for the search definitions EP_PV_EXPRESSITEMS_SD and EP_PV_MASTERITEM_SD.

To enable Search Framework for Fluid Requisition, select eProcurement, Administer Procurement, Maintain Overall System Options, eProcurement Installation Options, and select Catalog Search Type as Search Engine, as shown in the following example:

Note. Do not select *Structured Query Language* as the Catalog Search Type. If *Structured Query Language* is the only option available in the list, then it indicates that the Search Framework is not configured properly.

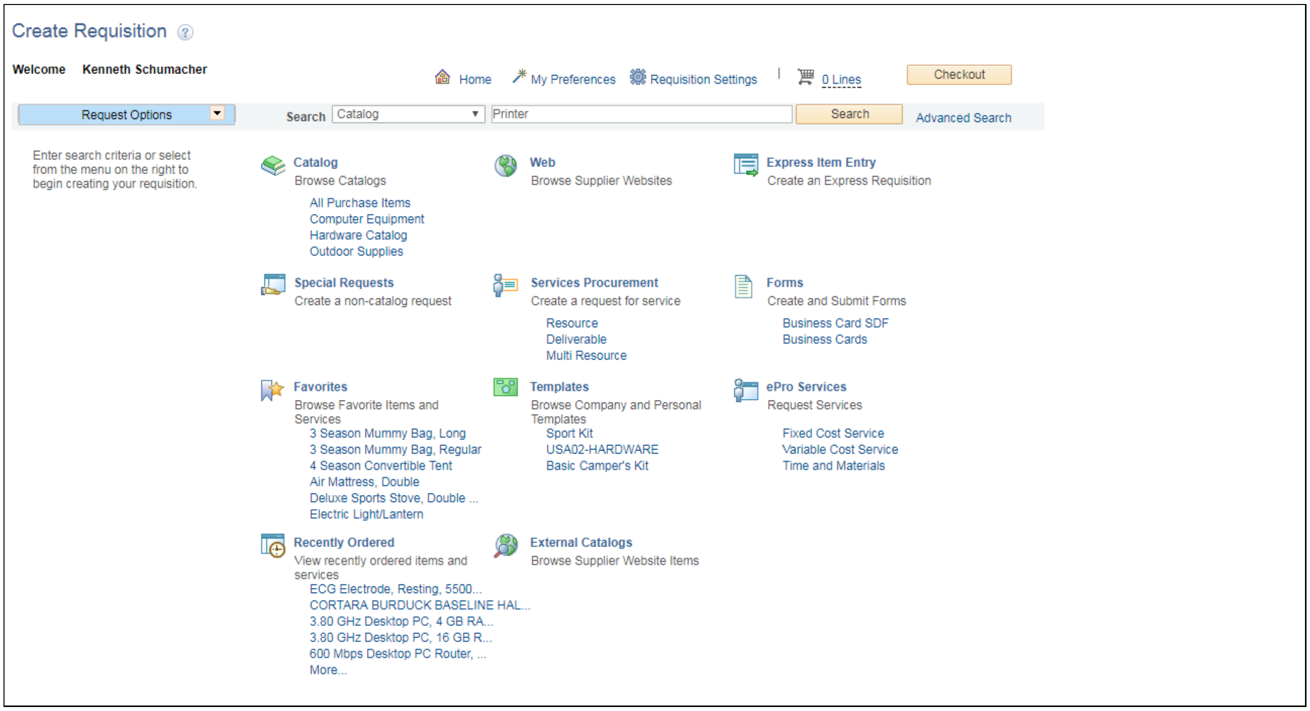


eProcurement Installation Options page

To verify that the search engine is working:

1. Select eProcurement, Requisition.

2. In the search bar, select the search type as Catalog, and enter a suitable text to search, for example, *Printer*, as shown in the following example:



Requisition Page: Verify Search Type

3. Click Search. The Catalog Search Results page opens with the search results.

   In this page, the search results are displayed on the right panel, and the details pertaining to each search result are displayed on the left panel.

Task 20-2-2: Application Searching (Global Search) Security

To activate Application Searching for catalog items, in addition to deploying and indexing all the regular eProcurement Search Definitions and Categories, an additional category EP_CATALOG_ITEMS must be deployed and specified as a Search Group. This category, like the category EP_PV_MASTERITEMVENDOR_CAT, has all the required three search definitions mentioned in the previous section.

To perform Global Search, EP_CATALOG_ITEMS has to be assigned to a Permission List :

1. Select PeopleTools , Security, Permissions & Roles, Permission Lists.
2. Search for and select the Permission List EPPV1000.
3. Select the Search Groups tab.

4. Select the catalog item EP_CATALOG_ITEMS from the lookup prompt, which is the Search Category specified as Search Group, as shown in the in the following example:

Permission Lists page: Search Groups tab for EPPV1000

Note. Search categories flagged as search groups will only appear in the lookup prompt.

---

5. Click Save. Global Search bar appears after adding the search group.

Note. The user may need to log out and log in back to see the global search bar. Additionally, this type of searching must be activated as part of the Portal configuration.

The user associated with a role connected with the permission list and any search groups assigned as searchable targets should be able to see the global search bar.

Appendix A

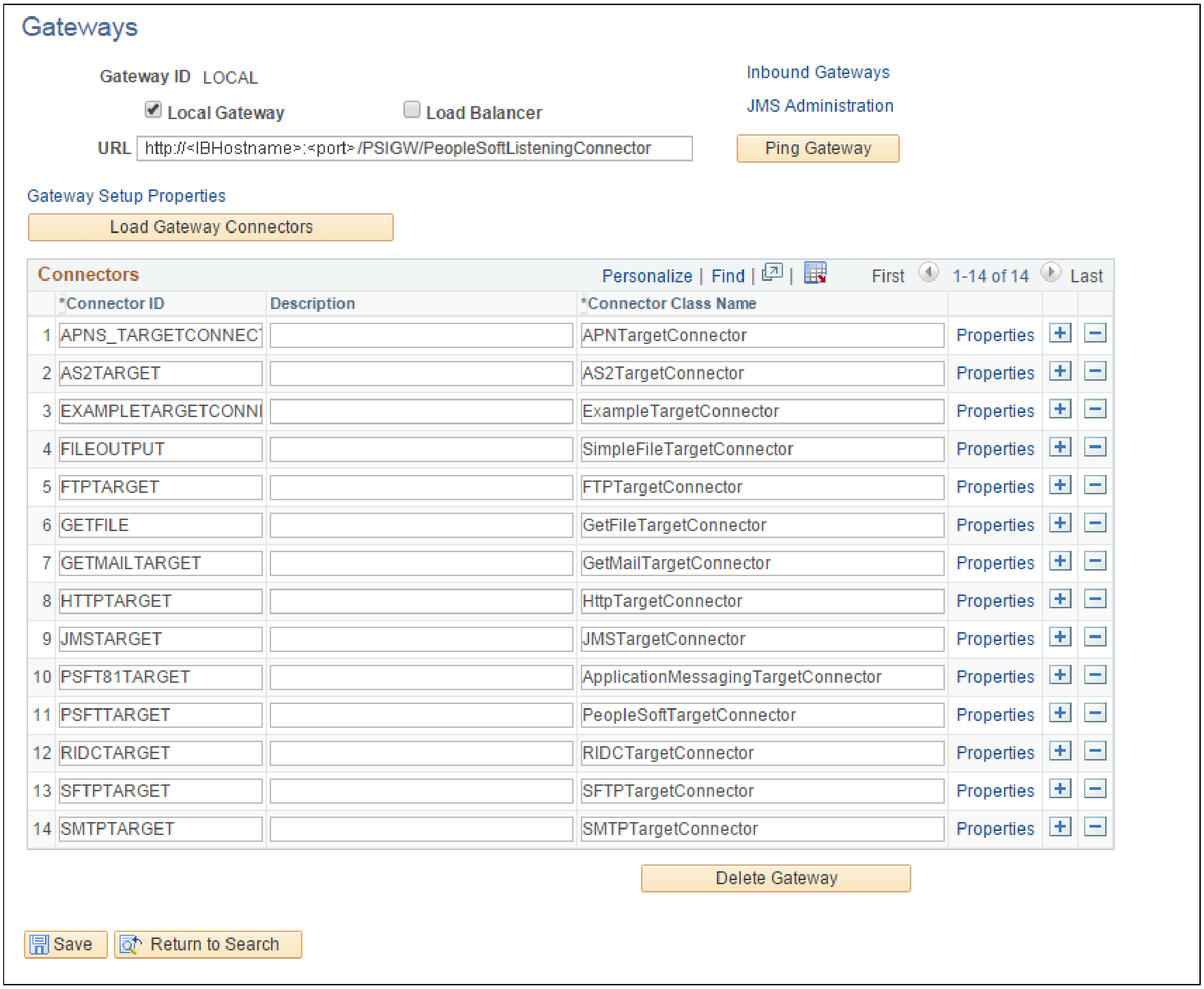
Applying Common Installation Instructions

Task A-1: Setting Up Integration Gateways

To set up integration gateways in PeopleSoft FSCM/HCM environment:

1. In your PeopleSoft FSCM/HCM 9.2 environment, select PeopleTools, Integration Broker, Configuration, Gateways, and click Search.

   The Gateways page for the Local Gateway appears by default, as shown in the following example:

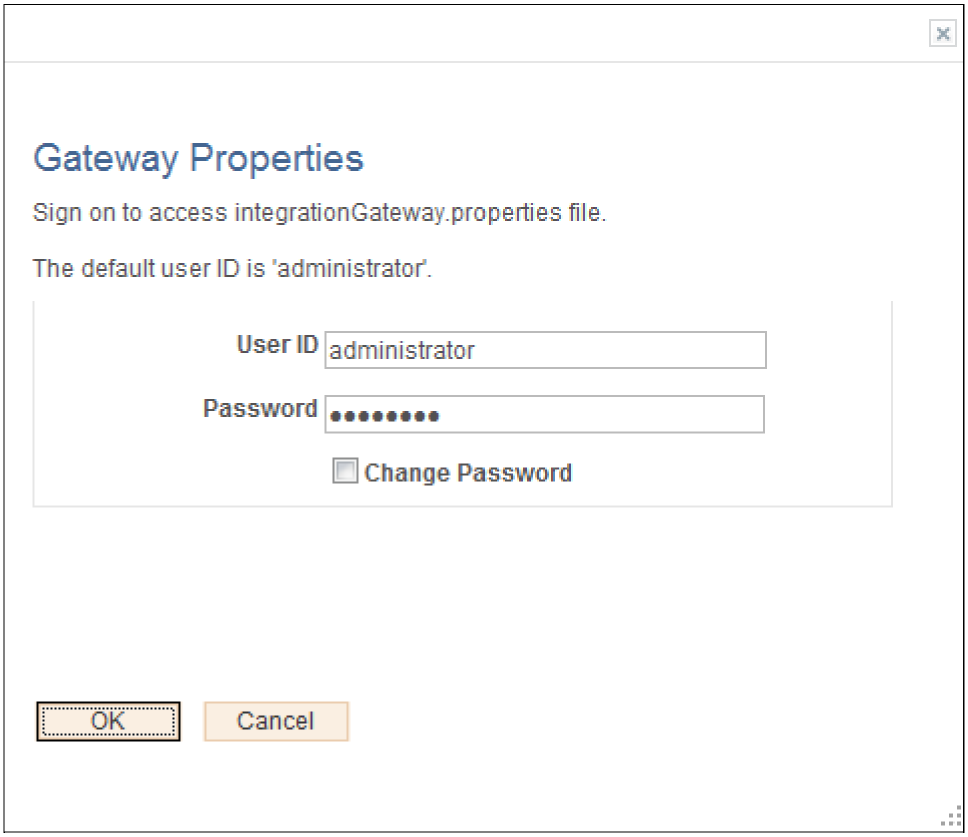


Gateways page for the Local Gateway

2. On the Gateways page for the local gateway, in the URL field, enter *http://<IBHostname>:<port>/PSIGW/PeopleSoftListeningConnector* for the local gateway URL.
3. Click the Load Gateway Connectors button.
4. Click Save.
5. Click the Ping Gateway button to verify connectivity and proper configuration.

6. Click the Gateway Setup Properties link.

   The Gateway Properties signon page appears, as shown in the following example:



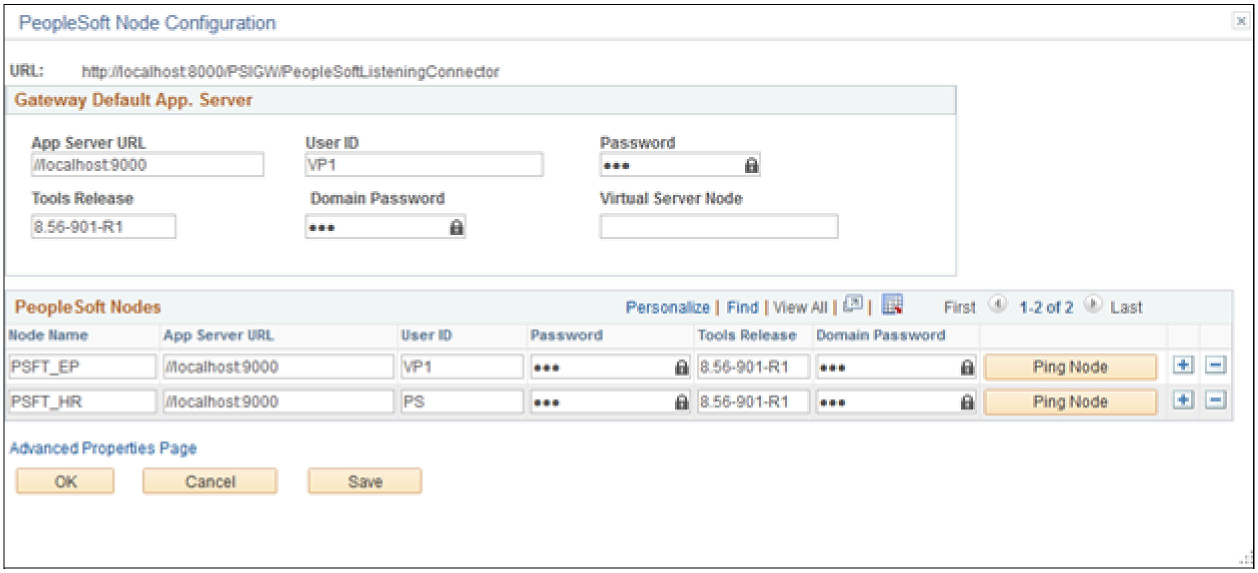
Gateway Properties signon page

7. On the Gateway Properties signon page, enter the user ID and password for the Integration Gateway.

   If you do not know the user ID and password of the Integration Gateway, contact your system administrator.

8. Click OK.

   The PeopleSoft Node Configuration page appears, as shown in the following example:



PeopleSoft Node Configuration page

9. On the PeopleSoft Node Configuration page, in the Gateway Default App. Server group box, enter values for the following fields:

   - App Server URL
   - User ID– typically ID of a super user of your system (VP1 in this example).
   - Password– typically password of a super user of your system (VP1 in this example).
   - Tools Release

10. You must add both the PSFT_EP node and PSFT_HR node in the PeopleSoft FSCM and HRMS application respectively.

    As necessary, click the Add (+) button to add the default local node. For FSCM application server node, add PSFT_EP and for HCM application server node, add PSFT_HR.

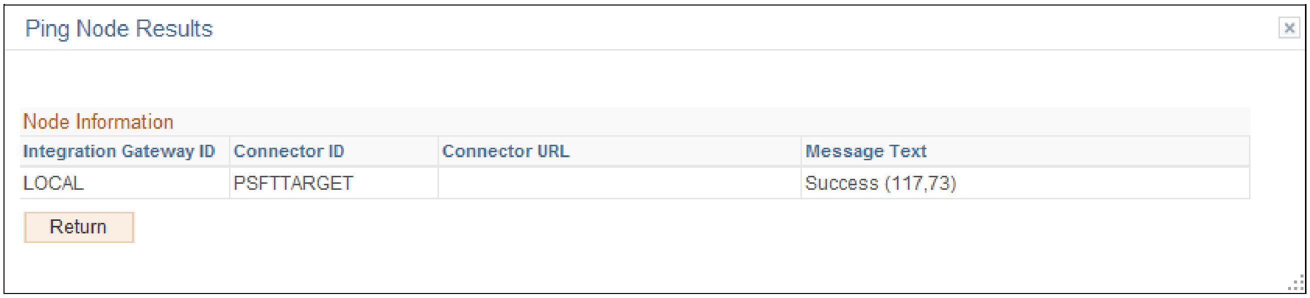
11. In the Tools Release field, enter the PeopleSoft PeopleTools release number.

    Enter the exact release number that you obtain from pinging the gateway. Such as 8.56; it must match exactly.

12. Click Save.

13. Click the Ping Node button to ping the node (for FSCM PSFT_EP node and for HCM PSFT_HR node) and verify that it is responding.

    If the ping is successful, the Ping Node Results page shows Success in the Message Text column, as shown in the following example:



Ping Node Results page

14. Click the Return button to return to the PeopleSoft Node Configuration page.

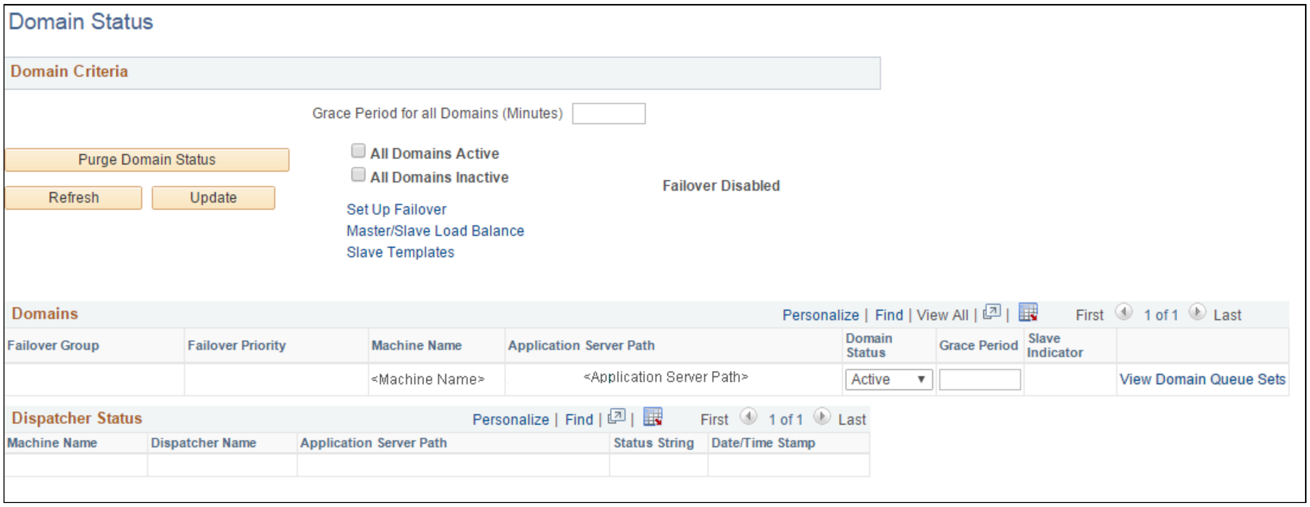
Task A-2: Activating the Domain

Before activating the local domain in PeopleSoft FSCM/HCM, verify that the PUB server is up and running.

To activate the local domain in PeopleSoft FSCM/HCM:

1. In your PeopleSoft FSCM 9.2 environment, select People Tools, Integration Broker, Service Operations Monitor, Administration and Domain Status.

   The Domain Status page appears, as shown in the following example:



Domain Status page

2. On the Domain Status page, in the Domain Status field, select *Active* from the drop-down list box.
3. Click the Update button.

   Note. After you click Update, if your machine name does not appear in the list, click the Purge Domain Status button and then click the Refresh button.

Task A-3: Setting Up Message Node Definitions

To set up message node definitions in the PeopleSoft FSCM/HCM environment:

Note. PSFT_HR is the default local node in HR environment and PSFT_EP in FSCM. For single sign on to work, same password must be used on nodes in both the environments.

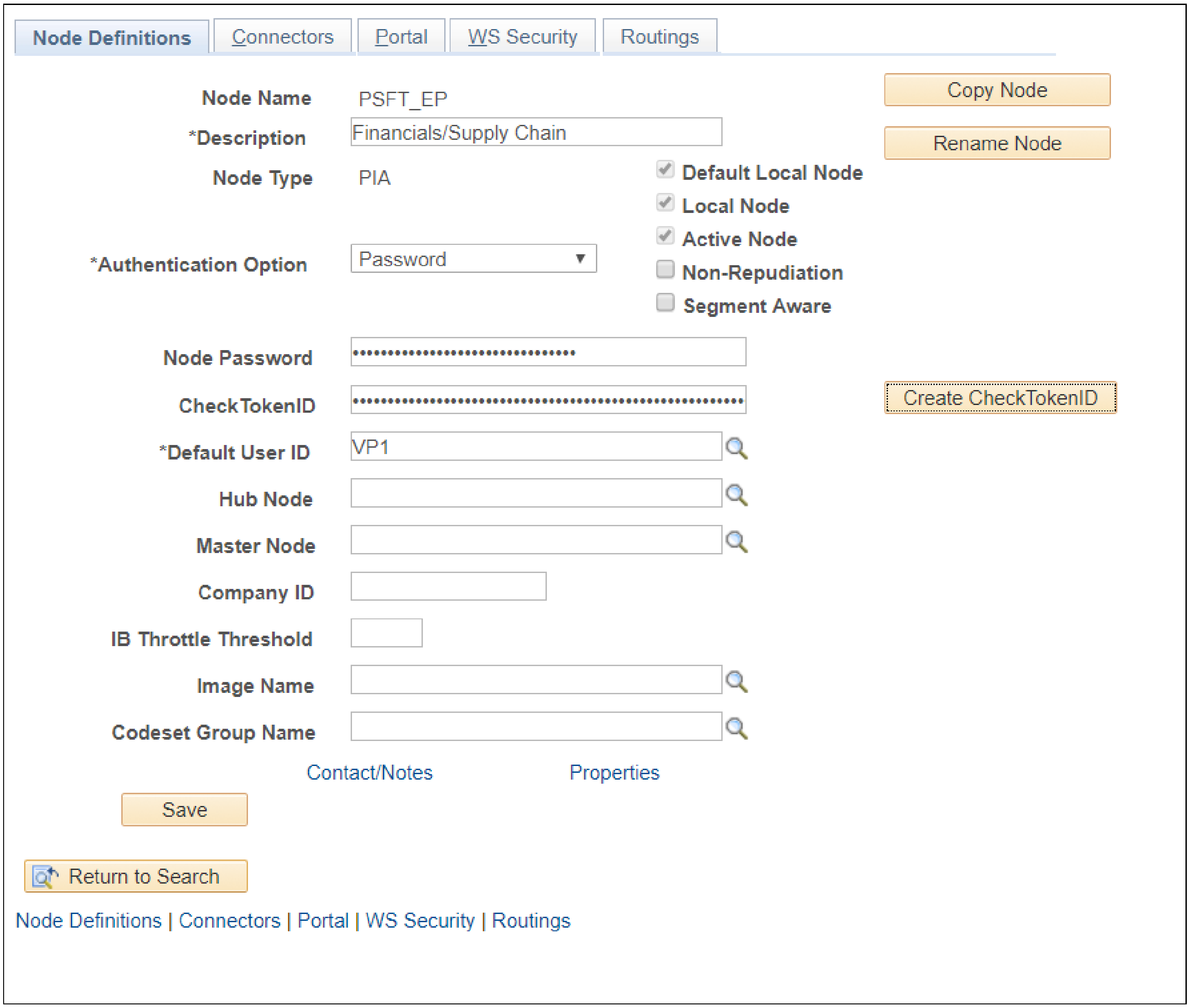
PSFT_EP exists in HCM and PSFT_HR exists in FSCM which needs to be configured for single sign on to work

1. In your PeopleSoft FSCM/HCM 9.2 environment, select People Tools, Integration Broker, Integration Setup, Nodes.

2. On the Nodes search page, search for and select the node name. For FSCM, search for *PSFT_EP* and for HCM, search for *PSFT_HR.*

   The Node Definitions page appears, as shown in the following example:

Note. The below screenshot is from FSCM environment. For HCM environment, follow the same configuration steps using node name as PSFT_HR.

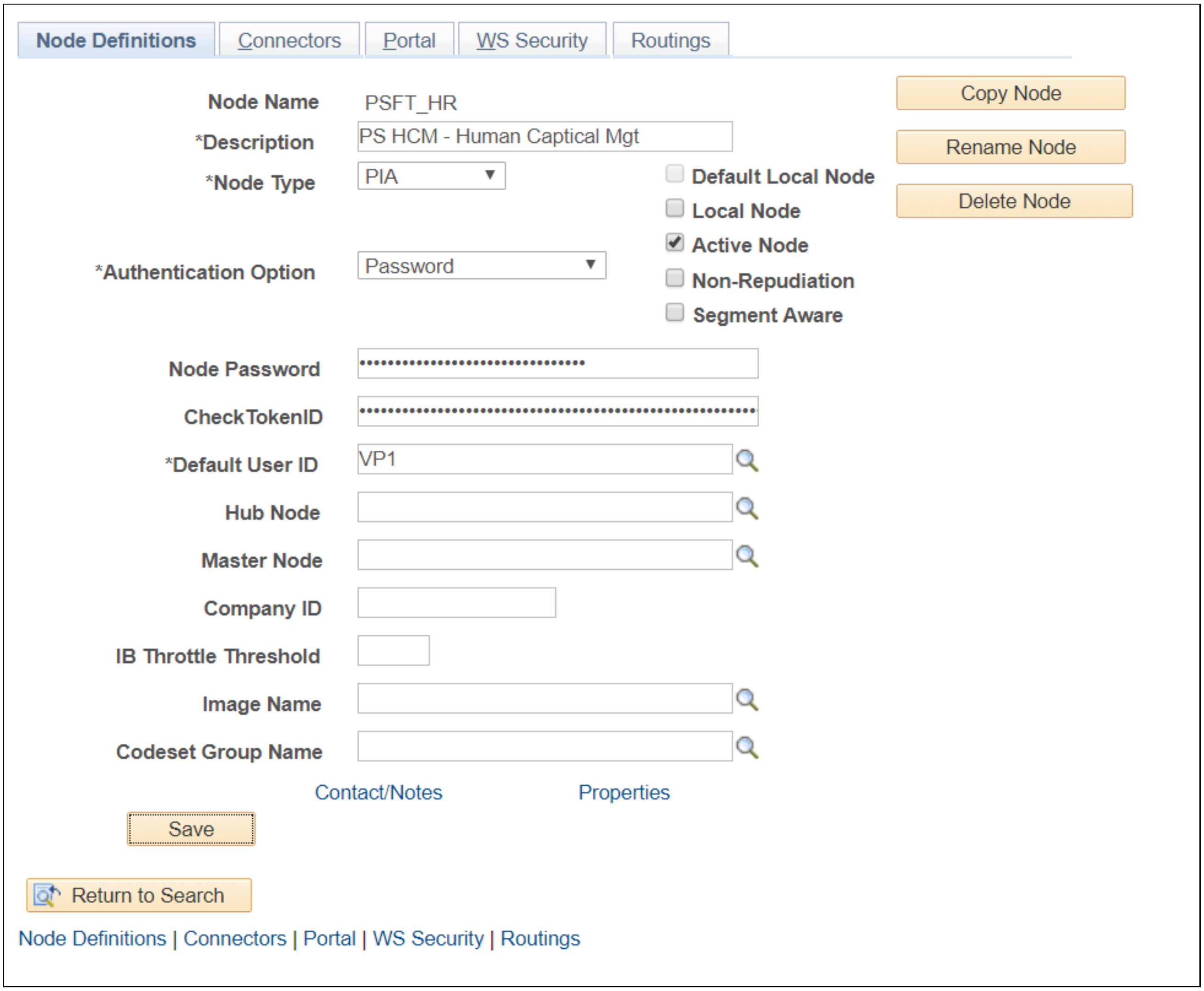


Node Definitions page for FSCM - PSFT_ EP Node

3. On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
4. In the Node Password field, enter a password.
5. In the Confirm Password field, re-enter the password.
6. Click the Create CheckTokenID button to generate CheckTokenID and note down the ID.
7. Click Save, then click the Return to Search button.

8. On the Nodes search page, search for and select the node name. For FSCM search for*PSFT_HR* and for HCM search for *PSFT_EP*. Below screenshot is from FSCM environment (replace with PSFT_EP in HCM environment).

   The Node Definitions page appears, as shown in the following example:



Node Definitions for HCM - PSFT_HR node

9. On the Node Definitions page, in the Authentication Option drop-down list box, select *Password.*
10. In the Password field, enter a password.
11. In the Confirm Password field, re-enter the password.
12. Enter CheckTokenID. Copy ID generated in step 6 for PSFT_HR and PSFT_EP from HCM and FSCM respectively.
13. Click Save.

Task A-4: Setting Up Portal Nodes

This section discusses:

- Understanding Portal Node Set Up
- Setting Up Portal Nodes in PeopleSoft FSCM/HCM

Task A-4-1: Understanding Portal Node Set Up

The PeopleSoft FSCM and PeopleSoft HCM environments contain both ERP and HRMS portal nodes. You must set both portal nodes in both environments.

ERP is the local node in PeopleSoft FSCM. HRMS also exists in PeopleSoft FSCM and must be set.

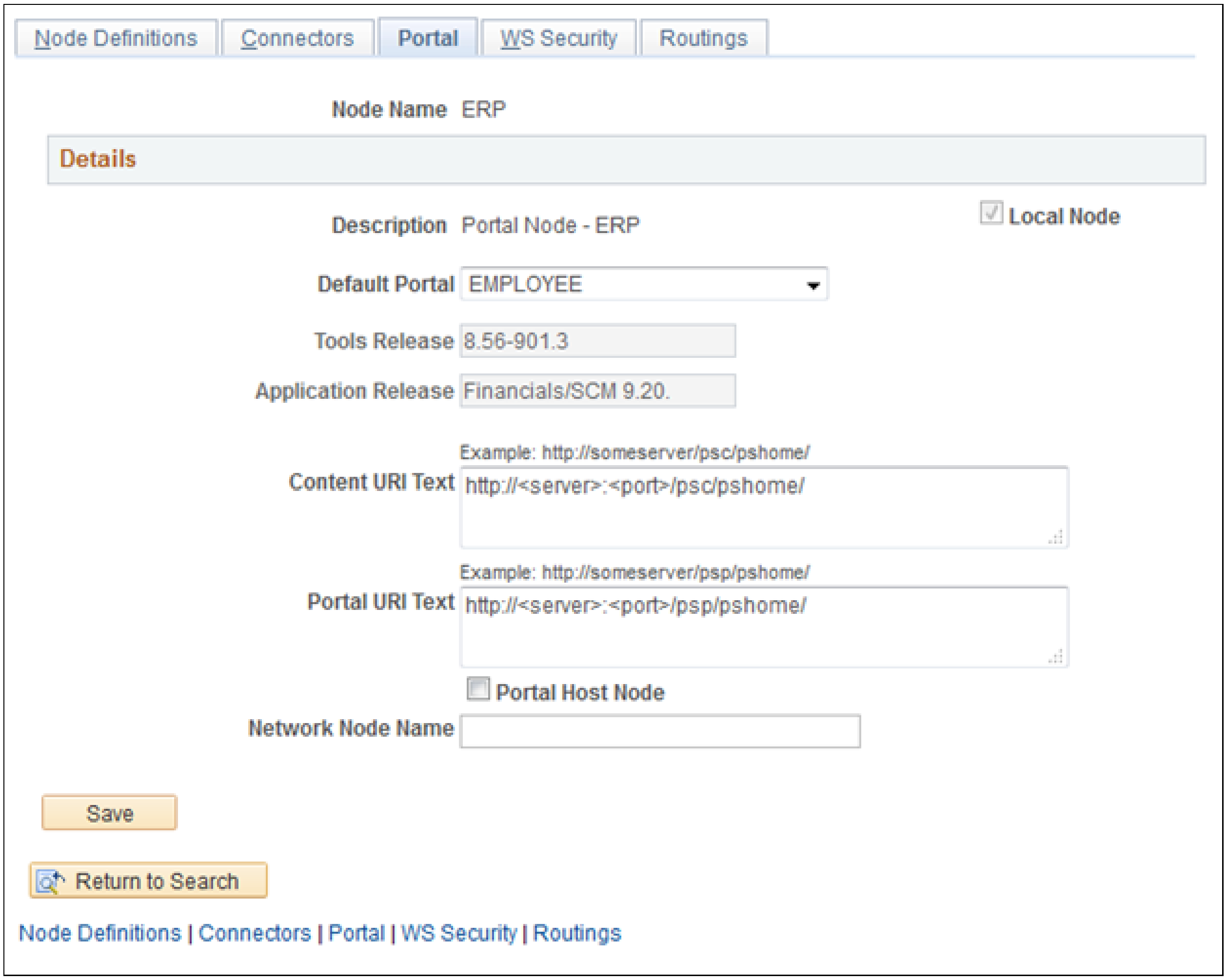
HRMS is the local node in PeopleSoft HCM. FSCM also exists in PeopleSoft HCM and must be set.

Task A-4-2: Setting Up Portal Nodes in PeopleSoft FSCM/HCM

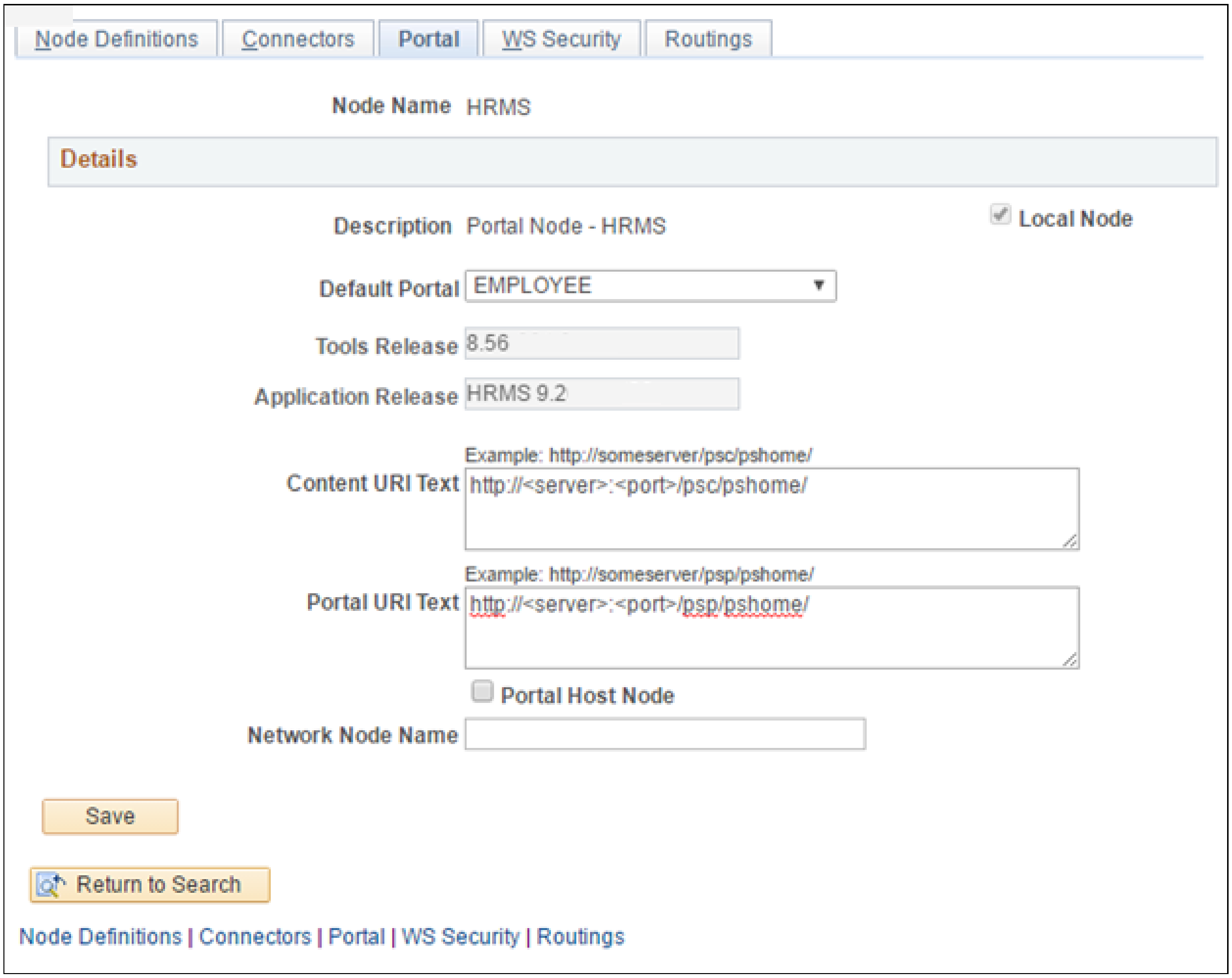
To set up portal node definitions in the PeopleSoft FSCM/HCM environment:

1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. On the Nodes search page, search for and select the node name. For FSCM, select *ERP* and for HCM, select *HRMS.*

3. On the Node Definitions page, select the Portal tab to access the Portal page for the ERP/HRMS node, as shown in the following example:



Portal Node page for FSCM - ERP node



Portal Node page for FSCM - HRMS node

4. On the Portal page, in the Content URI Text field, enter *http://<server>:<port>/psc/pshome/* to correspond to your PeopleSoft FSCM/HCM environment.
5. In the Portal URI Text field, enter *http://<server>:<port>/psp/pshome/* to correspond to your PeopleSoft FSCM/HCM environment.
6. Click Save.
7. Click the Return to Search button.