
PeopleSoft Financials/Supply Chain Management 9.2 (through Update Image 37) Installation

September 2020

PeopleSoft Financials/Supply Chain Management 9.2 (through Update Image 37)

Installation

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About This Documentation

This preface discusses:

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

Understanding This Documentation

This documentation is designed to 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.
<i>Italics</i>	Indicates field values, emphasis, and book-length publication titles. Italics is also used to refer to words as words or letters as letters, as in the following example: Enter the letter <i>O</i> .
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 <i>See</i> refer you to additional documentation that will help you implement the task at hand. We highly recommend that you reference this documentation. Cross-references under the heading <i>See Also</i> 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 <i>Note</i> . 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 <i>Important!</i> 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 <i>Warning!</i> contains critical configuration information or implementation considerations; for example, if there is a chance of losing or corrupting data. Pay close attention to warning messages.

Products

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 the Products area on the Oracle website for a list of PeopleSoft products, <https://www.oracle.com/products/oracle-a-z.html>.

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 8.58 are delivered as deployment packages (DPKs), which include the installation files for both the PeopleSoft 9.2 application and PeopleSoft PeopleTools 8.58.

To run PeopleSoft FSCM application, you must be on PeopleSoft PeopleTools 8.58.05.

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 8.58 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 8.58 Home Page, My Oracle Support, Doc ID 2602329.2.

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.

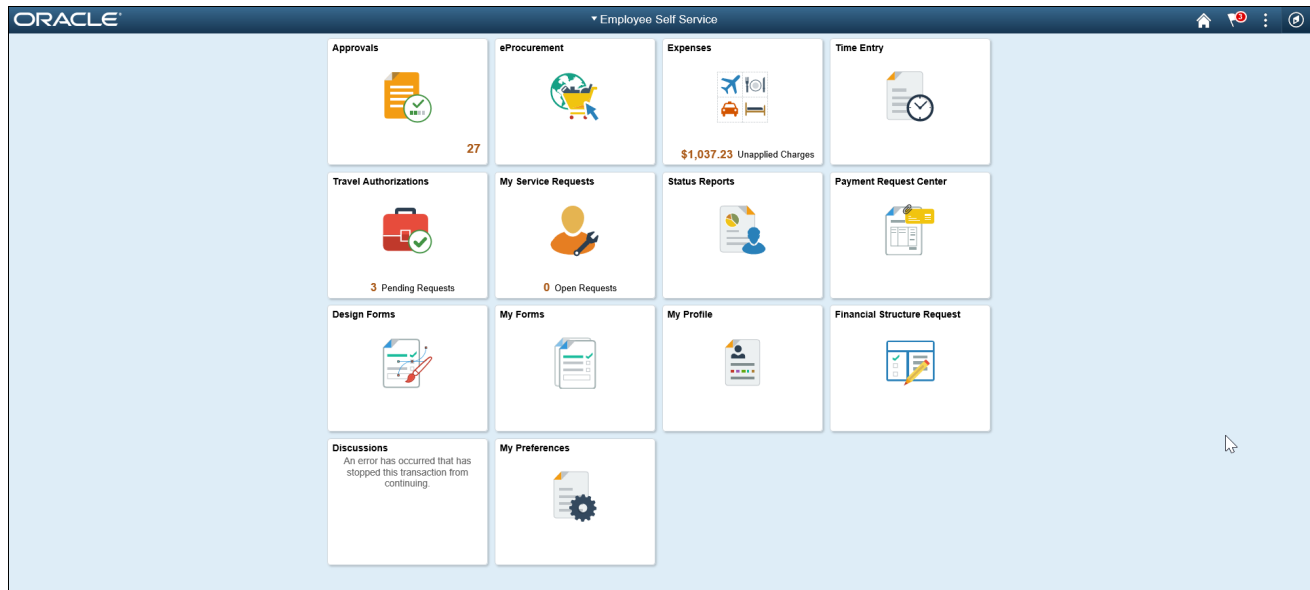
Platform	Approximate Database Size
Oracle — Unicode/ANSI	20 GB
DB2 z/OS — ANSI	42 GB
DB2 z/OS — Unicode	48 GB
Microsoft SQL Server — ANSI	8.55 GB
Microsoft SQL Server — Unicode	11.5 GB

Note. For the sake of brevity, this documentation sometimes refers to DB2 for z/OS as DB2 z/OS.

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:

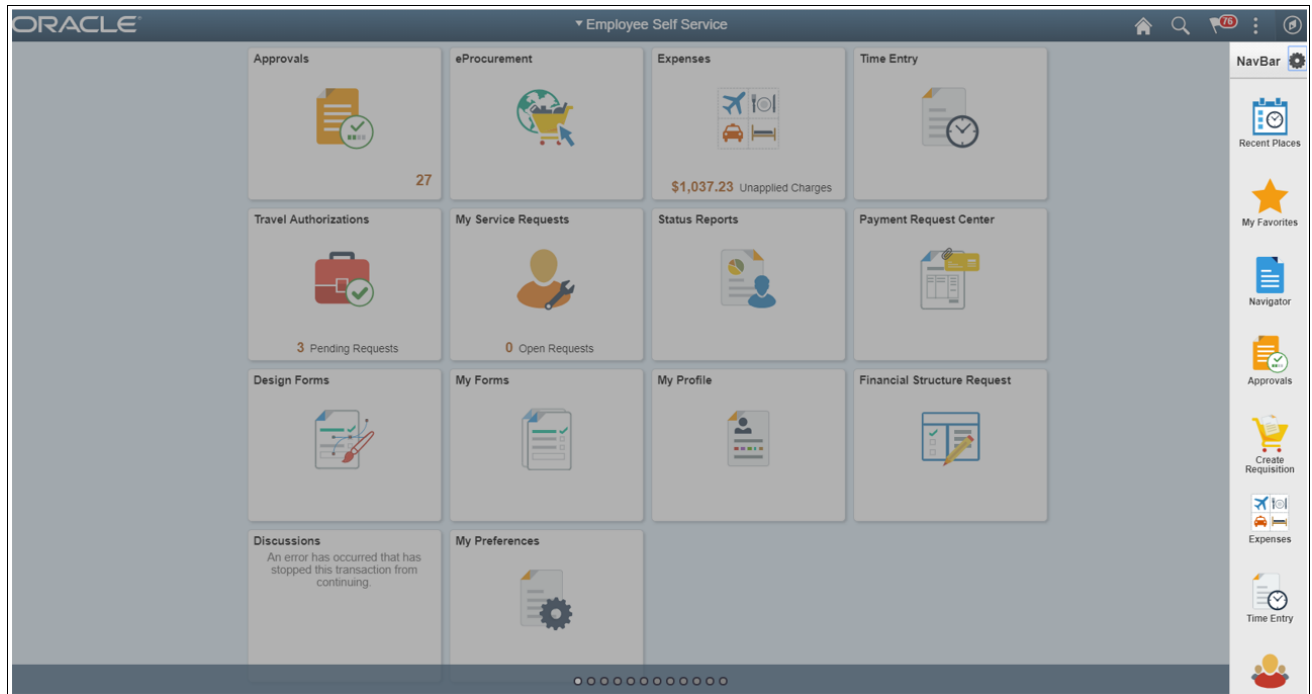
1. On the PeopleSoft Fluid User Interface, shown in this example, select (press) the NavBar button at the top right, which looks like a compass.



PeopleSoft Fluid User Interface home page

The Navigation bar (NavBar) side page appears.

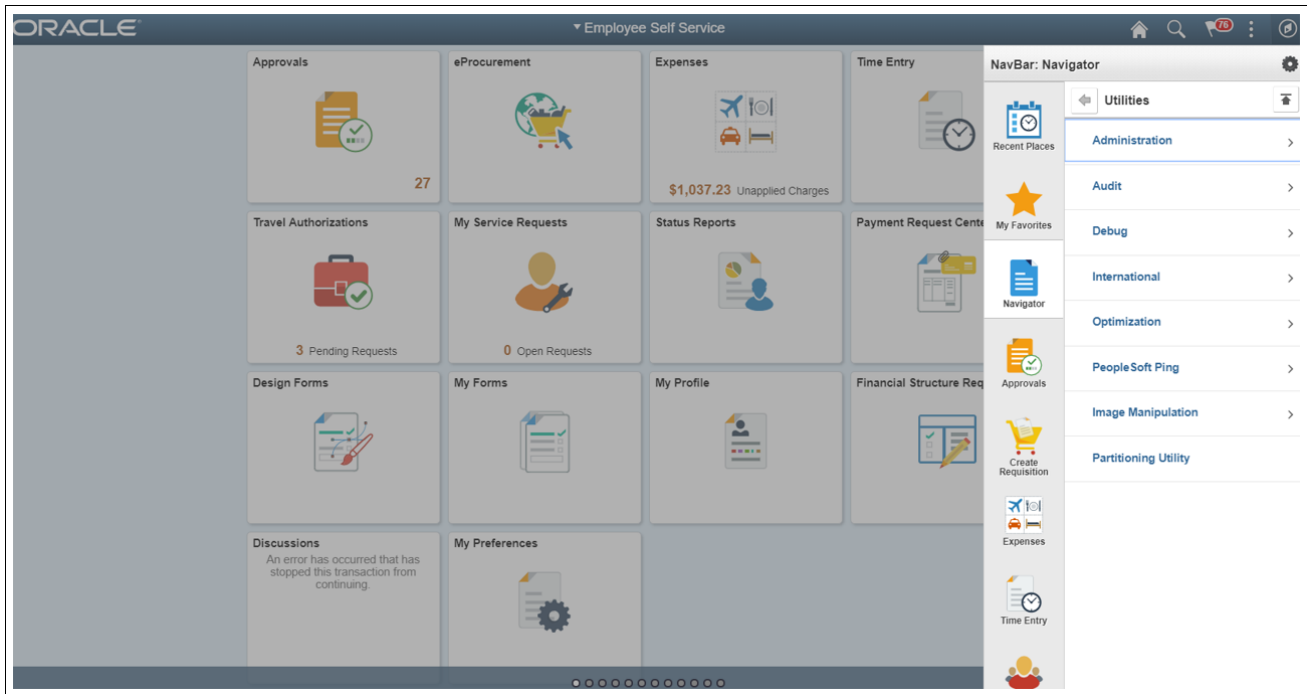
2. Select (press) Navigator.



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 Home pages"

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 z/OS 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 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 JCL shell, 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):

```
//*CTTRANS DD DSN=&SQRHLQ..LINKLIB,DISP=SHR
//SQDIR DD DSN=&SQRHLQ..ERRDAT,DISP=SHR
//SI DD DSN=&PSHLQ..SQRINC,DISP=SHR
//SYSTEM 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
/**
//SYSTEM 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! Beginning with PeopleSoft PeopleTools 8.58, PeopleSoft Search Framework adds support for a new version of search engine Elasticsearch 7.0.

Important! You should *only* perform these steps if you have completed the tasks discussed in PeopleSoft Deployment Packages for Elasticsearch Installation (PeopleSoft PeopleTools 8.58), chapter "Integrating Elasticsearch with the PeopleSoft Environment," which is available in Elasticsearch Homepage (Document ID: 2205540.2) on My Oracle Support.

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
Credit to Cash	Search Credit to Cash	EPSR1100

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_CREDIT_TO_CASH	Credit to Cash
N	3	EP_SOURCING	Strategic Sourcing
N	4	EP_PROCUREMENT	Purchasing/Procurement
N	5	EP_ASSETS	Asset Management
N	6	EP_PAYABLES	Accounts Payable
N	7	EP_EXPENSES	Expenses
N	8	EP_GENERAL_LEDGER	General Ledger
N	9	EP_VENDORS	Supplier Information
N	10	EP_CATALOG_ITEMS	Catalog Items
N	11	EP_CS_AUTHORED_DOC	Supplier Contract Documents
N	12	PTPORTALREGISTRY	Navigator
N	13	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	Ad hoc 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

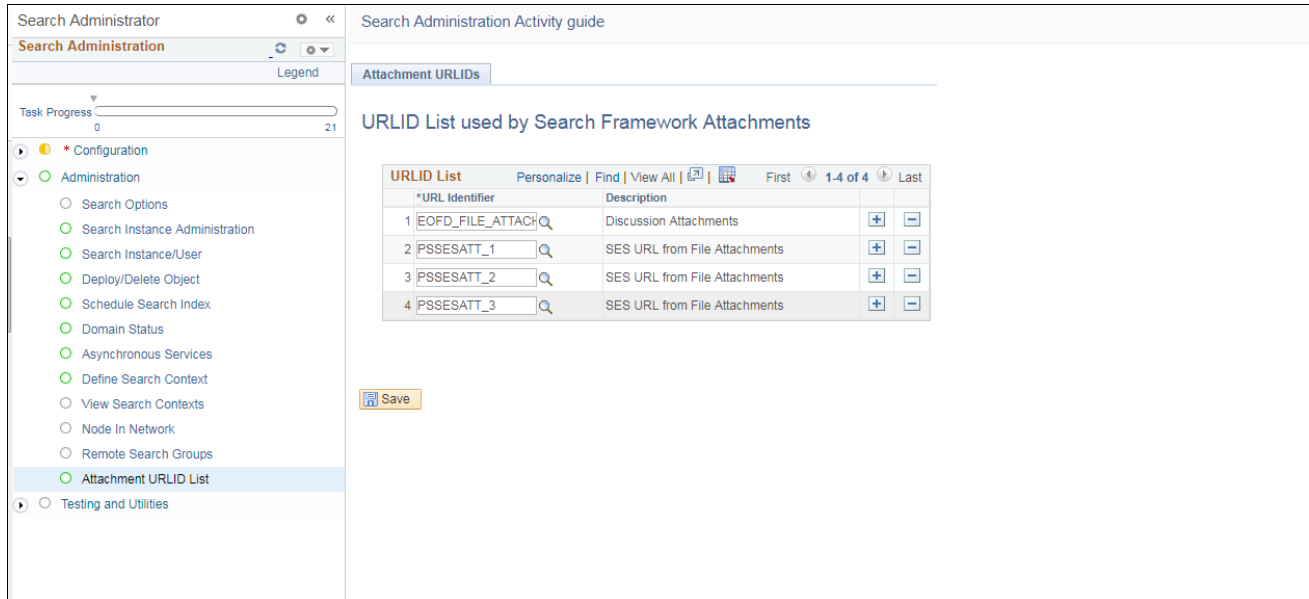
Search Definition	Description	Used In
EP_PO_PURCHASE_ORDERS	Purchase Orders	Global / Search Pages
EP_PO_REQUISITIONS	Requisitions	Global / Search Pages
EP_SS_EVENTS	Sourcing Events	Global / Search Pages
EP_AR_ITEMS	AR Items	Global / Search Pages
EP_AR_PAYMENTS	AR Payment Search	Global / Search Pages
EP_AR_PMT_ENTRY	AR Payment	Global / Search Pages
EP_BI_BILLING	Billing	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

- 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:

Administer File Attachments

*Pick Active Server 1 Add URL Server Add FTP Server Add Database Server

File Attachment Servers

ID	Type	*Login	*Password	Confirm Password	*Server/Record Name/URL Id	Path	Search URL Equivalent
1	FTP	<input type="text" value="ftpuser"/>	<input type="password" value="*****"/>	<input type="password" value="*****"/>	<input type="text" value="10.244.0.253"/>	<input type="text" value="FSCM91"/>	PSSESATT_1
2	FTP	<input type="text" value="ftpuser"/>	<input type="password" value="*****"/>	<input type="password" value="*****"/>	<input type="text" value="pf-sun07"/>	<input type="text" value="fscm90"/>	PSSESATT_2
3	DB				<input type="text" value="PV_ATT_DB_SRV"/>		PSSESATT_3
4	URL				<input type="text" value="COMMON_ATT_S_RI"/>		

▶ Component Subdirectories

Save Notify

Verify Attachment URL IDs

Note. The file attachment architecture may change based on the environment you are using. It may not be same as shown in the example above.

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

*Pick Active Server 1 Add URL Server Add FTP Server Add Database Server

File Attachment Servers

ID	Type	*Login	*Password	Confirm Password	*Server/Record Name/URL Id	Path	Search URL Equivalent
1	FTP	<input type="text" value="ftpuser"/>	<input type="password" value="....."/>	<input type="password" value="....."/>	<input type="text" value="10.244.0.253"/>	<input type="text" value="FSCM91"/>	PSSSATT_1
2	FTP	<input type="text" value="ftpuser"/>	<input type="password" value="....."/>	<input type="password" value="....."/>	<input type="text" value="pf-sun07"/>	<input type="text" value="fscm90"/>	PSSSATT_2
3	DB				<input type="text" value="PV_ATT_DB_SRV"/>		PSSSATT_3
4	URL				<input type="text" value="COMMON_ATT_S_RI"/>		

▶ **Component Subdirectories**

Save Notify

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

URL Identifier: PSESATT_1

*Description: SES URL from File Attachments

*URLID: ftp://10.abc.xyz.dfh

Comments: This URL was automatically added from the File Attachments page in Fin/SCM. Do NOT modify this URL from this page. Go to Setup Financials/Supply Chain > Common Definitions > File Attachments > Administer File Attachments to change this URL

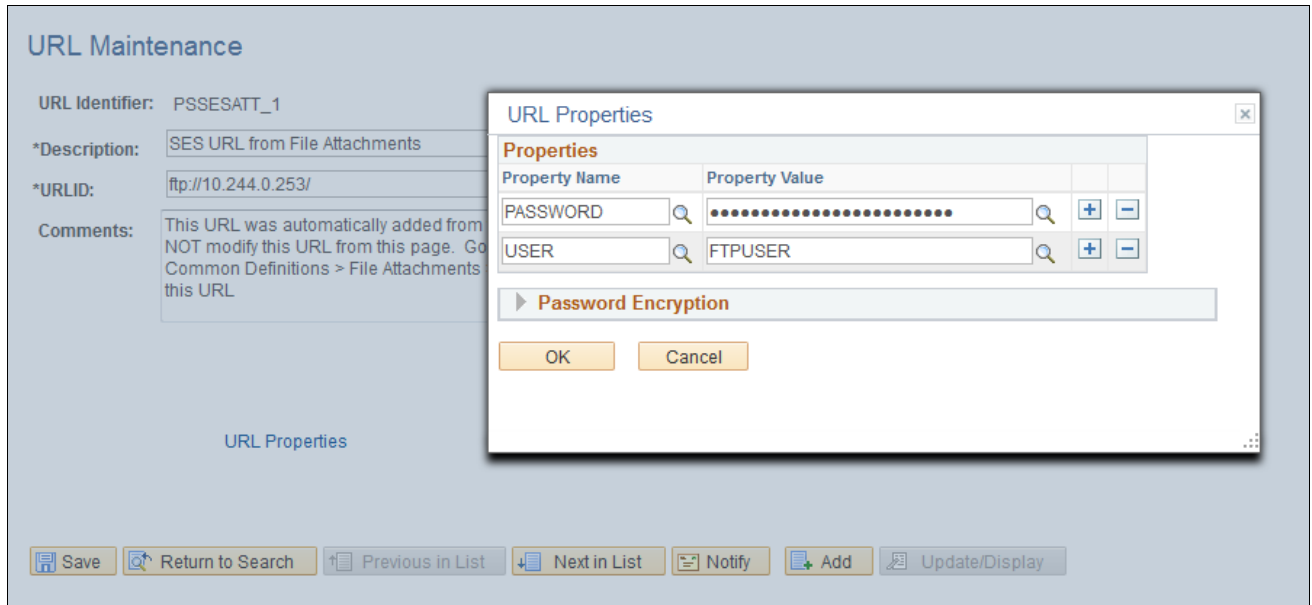
[URL Properties](#)

Save Return to Search Previous in List Next in List Notify Add Update/Display

URL Maintenance page

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

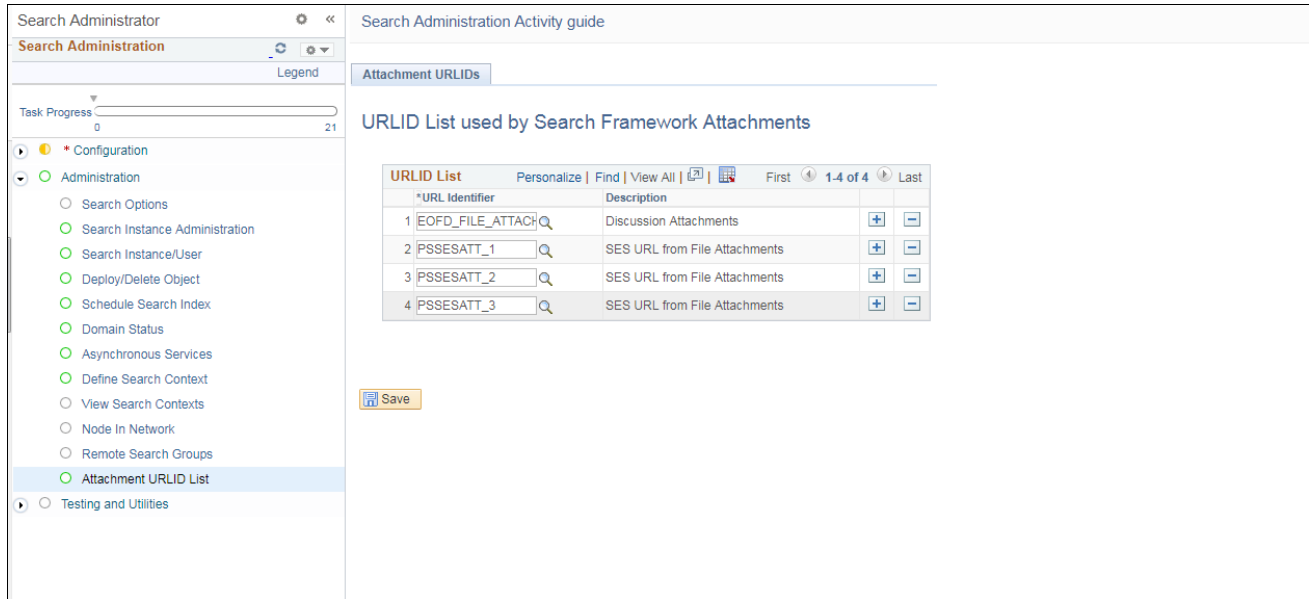
Verify the username and password are created under the URL Properties hyperlink and the URL path is correct. The following example shows URL Properties window:



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.

Change Properties

Enable ?	Disable ?	Materialized Query Table	Status	Tablespace Name
<input type="checkbox"/>	<input type="checkbox"/>	APOD_APPCSUM_M	Disabled	PCAPP
<input type="checkbox"/>	<input type="checkbox"/>	APOD_DELVCHR_M	Disabled	SYSTSTAB
<input type="checkbox"/>	<input type="checkbox"/>	APOD_HLDVCHR_M	Disabled	SYSTSTAB
<input type="checkbox"/>	<input type="checkbox"/>	APOD_INVCSUM_M	Disabled	PCAPP
<input type="checkbox"/>	<input type="checkbox"/>	APOD_PYMTLAT_M	Disabled	PCAPP
<input type="checkbox"/>	<input type="checkbox"/>	APOD_PYMTSUM_M	Disabled	PCAPP
<input type="checkbox"/>	<input type="checkbox"/>	APOP_APPCSUM_M	Disabled	SYSTSTAB
<input type="checkbox"/>	<input type="checkbox"/>	APOP_APPRVCH_M	Disabled	PTTBL
<input type="checkbox"/>	<input type="checkbox"/>	APOP_BSEPYMT_M	Disabled	PSIMAGE2
<input type="checkbox"/>	<input type="checkbox"/>	APOP_CANPYMT_M	Disabled	SYSTSTAB

Save Notify Add Update/Display

Change Properties: Materialized View

For more properties on this page,

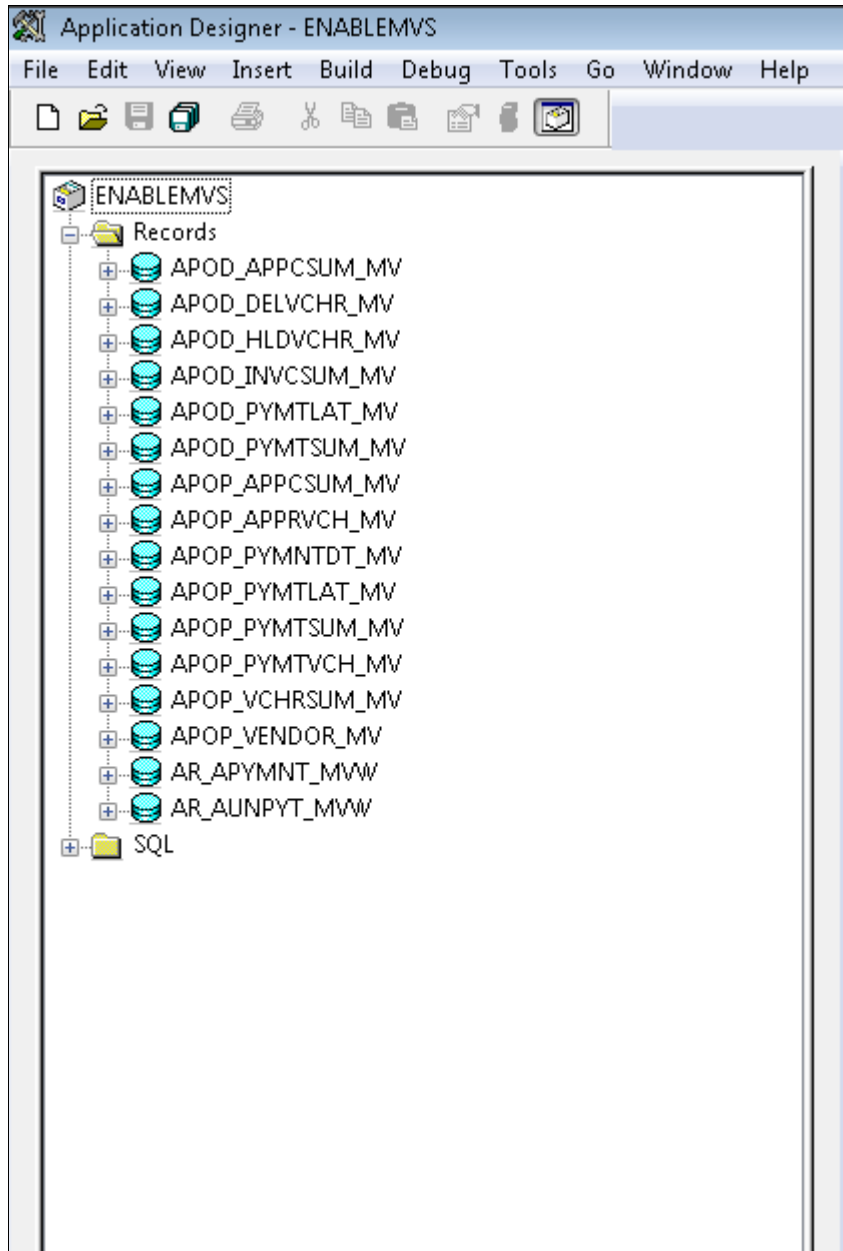
See PeopleSoft PeopleTools: Data Management, "Administering PeopleSoft Databases on Oracle", Using Materialized Views.

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.

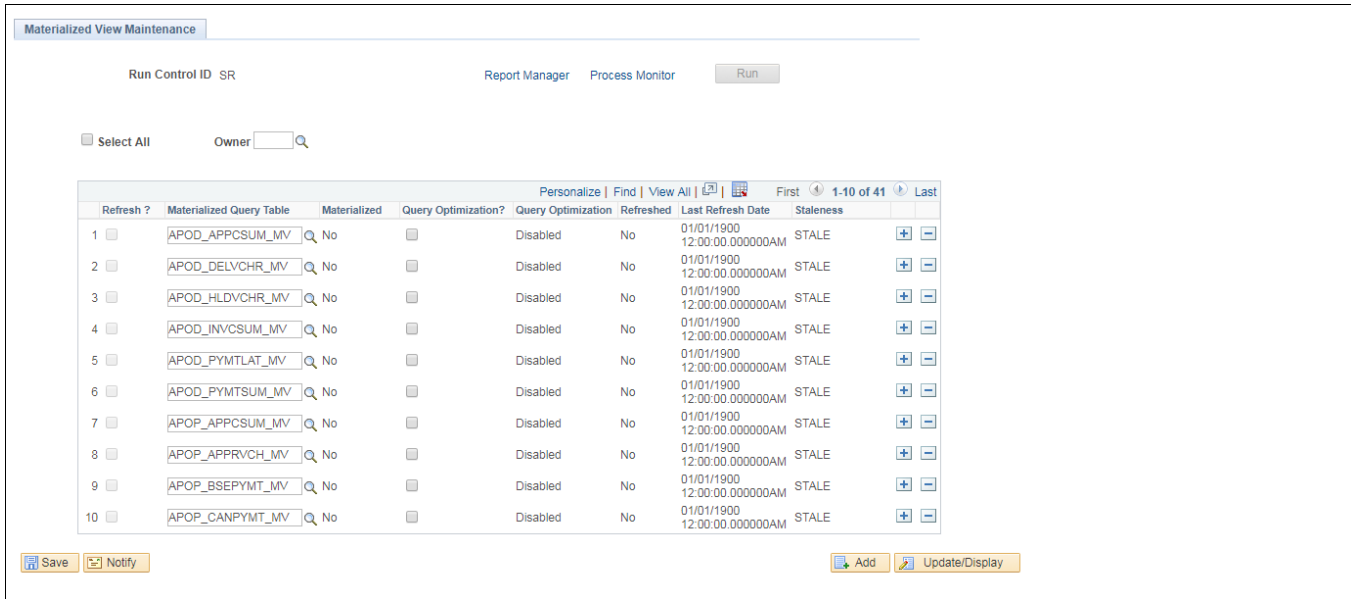


Application Designer: All Views

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.

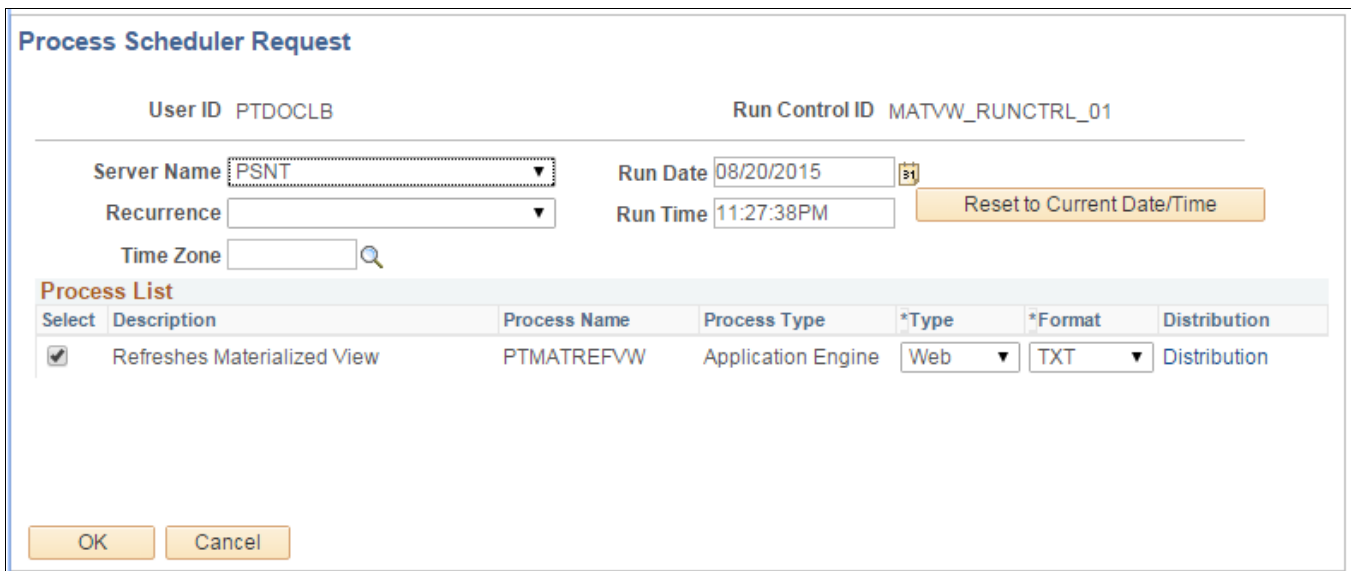


Materialized View Maintenance

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

URL Identifier: GM_FORMS_LOCATION

*Description: Grants PDF templates

*URLID: C:\FORMS\

Comments:

Save Return to Search Notify Add Update/Display

URL Maintenance page

- 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:

- 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

- 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:

The screenshot shows the 'Print Proposal' page. At the top, it displays 'Run Control ID 1' and a 'Run' button. Below this, there are links for 'Report Manager' and 'Process Monitor'. The main section is titled 'Proposal to be Submitted' and contains several search fields with magnifying glass icons:

- *Business Unit: EGV05
- *As of Date: 09/24/2012
- *Proposal ID: PI-PRP001
- *Version ID: V101 (with text: The effects of insulin on laboratory rats)
- *Form ID: PHS398 (with text: PHS 398 Grants Application)

 At the bottom of the page, there are four buttons: 'Save', 'Notify', 'Add', and 'Update/Display'.

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:

The screenshot shows the 'Administration' tab of the Report Manager. At the top, there are navigation tabs: 'List', 'Explorer', 'Administration' (selected), and 'Archives'. Below this is a 'View Reports For' section with search filters for User ID (VP1), Type, Last, Days, Status, Folder, and Instance. A 'Refresh' button is present. The main area is a 'Report List' table with columns: Select, Report ID, Prcs Instance, Description, Request Date/Time, Format, Status, and Details. The table contains five rows of reports. Below the table are 'Select All' and 'Deselect All' checkboxes, a 'Delete' button, and a 'Save' button. A footer navigation bar shows 'List | Explorer | Administration | Archives'.

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	17633	75748	GM_EDI	03/04/2016 8:28:54AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	17632	75743	Index Search Documents	03/04/2016 1:00:59AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	17631	75742	BI Publisher empty dir clean	03/04/2016 1:00:59AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	17630	75741	BI Publisher Archive	03/04/2016 1:00:59AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	17629	75740	Process Scheduler System Purge	03/04/2016 1:00:42AM	Acrobat (*.pdf)	Posted	Details

Report Manager page- Administration tab

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

- 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

Report ID 22556	Process Instance 133893	Message Log
Name GM_EDI	Process Type Application Engine	
Run Status Success		

GM_EDI

Distribution Details

Distribution Node PRCS5529	Expiration Date 08/28/2017
----------------------------	----------------------------

File List

Name	File Size (bytes)	Datetime Created
AE_GM_EDI_133893.stdout	288	08/21/2017 5:56:44.546600AM PDT
PI-PRP001_V101_BioSketch_Schumacher_Kenneth_1.XML	431	08/21/2017 5:56:44.546600AM PDT
PI-PRP001_V101_BioSketch_Schumacher_Kenneth_1.xfdf	663	08/21/2017 5:56:44.546600AM PDT
PI-PRP001_V101_MAIN.XML	7,357	08/21/2017 5:56:44.546600AM PDT
PI-PRP001_V101_MAIN.xfdf	10,617	08/21/2017 5:56:44.546600AM PDT

Distribute To

Distribution ID Type	*Distribution ID
User	VP1

Report Detail page

- On the Report Detail page, view or print a file by clicking the file link and downloading the file to a local location.
- 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

Queue Name: EXPENSES
 Description: Expenses Message Channel
 Comments: This message is used for Approval and Workflow processes to submit and approve transactions.
 Purge Data

Archive Unordered
 Queue Status: Run
 Owner ID: Expenses

Operations Assigned to Queue

Service Operation	Version
EX_APPROVAL	VERSION_1
INITIATE	V1

Define Partitioning Fields

Include	Field	Alias Name
<input type="checkbox"/>	OPERATIONNAME	
<input type="checkbox"/>	PUBLISHER	
<input type="checkbox"/>	PUBPROC	

Buttons: Save, Add Field, Add, Update/Display, Return to Search, Notify

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.

- 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:

The screenshot displays the 'Service Operations - General' configuration page. At the top, there are tabs for 'General', 'Handlers', and 'Routings'. The main form area is divided into several sections:

- General Information:** Service Operation: EX_APPROVAL; Operation Type: Asynchronous - One Way; *Operation Description: Approval Process; Operation Comments: (empty text area); Owner ID: Expenses; Operation Alias: (empty text area).
- Service Operation Security:** User/Password Required; *Req Verification: None.
- Default Service Operation Version:** *Version: VERSION_1; Version Description: Approval Process; Version Comments: (empty text area); Default; Active.
- Routing Status:**

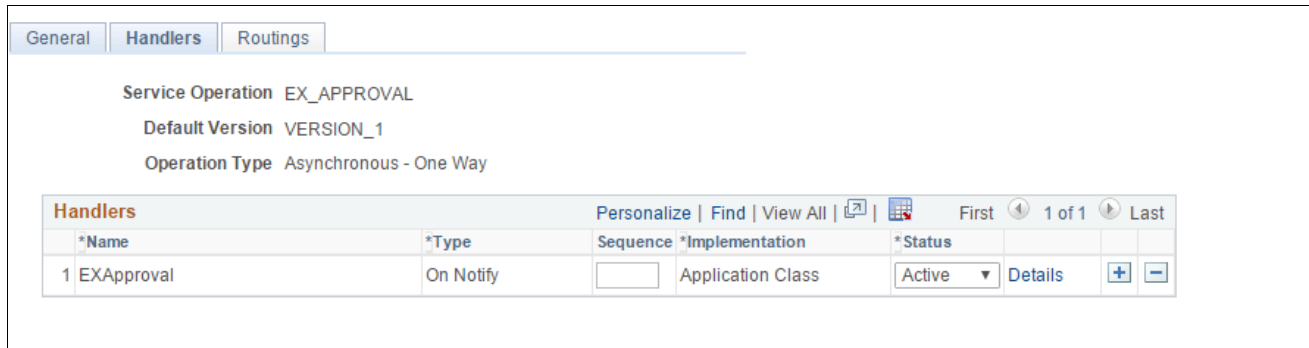
Any-to-Local	Exists
Local-to-Local	Exists
Local-to-Atom	Does not exist.
- Runtime Schema Validation:** Request Message; Non-Repudiation.
- Routing Actions Upon Save:** Regenerate Any-to-Local; Regenerate Local-to-Local. Warning: Regenerating sets all routing field values to their initial state.
- Message Information:** Type: Request; Message.Version: EX_APPROVAL.VERSION_1; *Queue Name: EXPENSES.

At the bottom, there is a 'Save' button and links for 'Return to Service' and 'Add Version'. The breadcrumb trail at the bottom left reads 'General | Handlers | Routings'.

Service Operations-General page

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

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

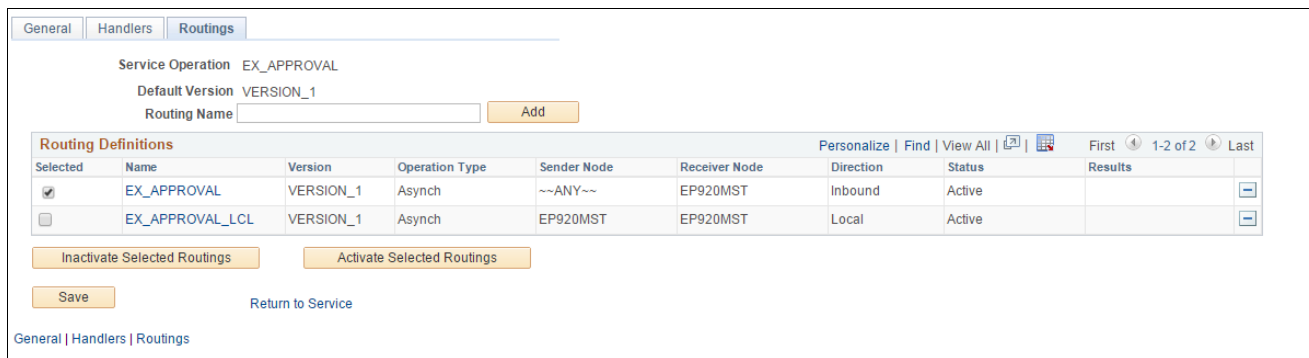


Service Operations - Handlers page

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.

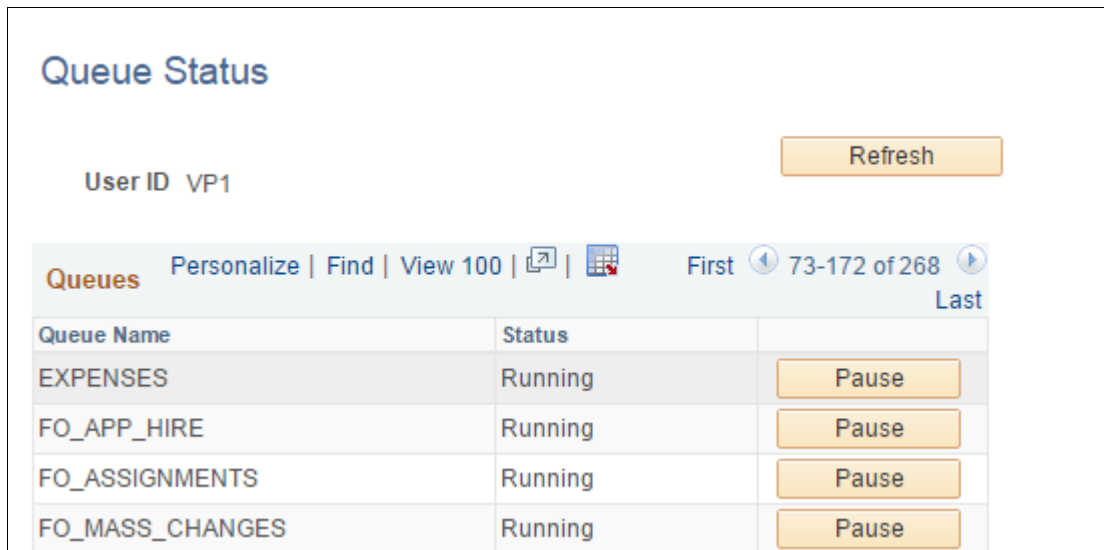
Task 8-1-4: Verifying the Message Channel Status

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 Name	Status	
EXPENSES	Running	Pause
FO_APP_HIRE	Running	Pause
FO_ASSIGNMENTS	Running	Pause
FO_MASS_CHANGES	Running	Pause

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

URL Identifier: EMP_SERVLET

*Description: Employee portal servlet

*URLID: http://xyz.us.oracle.com:8000/abc/ep

Comments: Example: http://servername/psp/employeeportaldomain/

URL Properties

Save Return to Search Notify Add Update/Display

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 and Oracle.

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

Authentication Token expiration time

Expiration Time in minutes: Valid values are 1 - 10,000

Trust Authentication Tokens issued by these Nodes

Message Node Name	Description	Local Node		
<input type="text" value="PSFT_EP"/> 🔍	Financials/Supply Chain	1	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="PSFT_HR"/> 🔍	PS HCM - Human Capital Mgt		<input type="button" value="+"/>	<input type="button" value="-"/>

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:

Queues

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

Search by: Queue Name begins with

[Search](#) [Advanced Search](#)

Search Results

View All First 1-100 of 268 Last

Queue Name
ACTION_REASON
ACTUAL_TIME
ADVANCED_SHIPPING_NOTICE
AIRLINE_TICKET_LOAD
AM_SETUP
AP_DCM_PROCESS

Queue Search Page

- 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

Queue Name: ACTION_REASON
 Description: Action Reason Setup
 Comments: Action Reason Setup

Archive Unordered

Queue Status: Run
 Owner ID: HR Core Objects

Operations Assigned to Queue

Service Operation	Version
ACTION_REASON_FULLSYNC	VERSION_1
ACTION_REASON_SYNC	VERSION_1

Define Partitioning Fields

Include	Field	Alias Name
<input type="checkbox"/>	ACTION	
<input type="checkbox"/>	ACTION_REASON	
<input type="checkbox"/>	EFFDT	
<input type="checkbox"/>	EFF_STATUS	
<input type="checkbox"/>	DESCR	
<input type="checkbox"/>	DESCRSHORT	
<input type="checkbox"/>	BEN_STATUS	
<input type="checkbox"/>	BAS_ACTION	
<input type="checkbox"/>	COBRA_ACTION	
<input type="checkbox"/>	ROE_REASON	

Queue Definitions page

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

- In your PeopleSoft HCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Queues.
- On the Queues search page, search for and select the queue name *ACTION_REASON*.
- On the Queue Definitions page, in the Queue Status field, select *Run* from the drop-down list box.
- Click Save.
- 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:

The screenshot shows the 'Installed Products' section of the PeopleSoft HCM Installation Table - Products page. The page has a navigation bar with tabs: Products, HCM Options, Product Specific, Country Specific, Last ID Assigned, Third Party/System, and Alternate Character. The 'Installed Products' section is a large box containing a list of product options, each with a checkbox. The options are arranged in three columns. The first column includes Human Resources, Benefits Administration, Succession Planning, Pension Administration, Time and Labor, Labor Rules and Monitoring, Absence Management, Payroll for North America, Payroll Interface, and Global Payroll Core. The second column includes Education and Government, Federal, Military, French Public Sector, German Public Sector, Currency Conversion Utility, Pay/Bill Management, Directory Interface, HRMS Portal Pack, General Ledger, Project Costing, Receivables, and Student Administration. The third column includes Enterprise Learning Management, Candidate Gateway, Talent Acquisition Management, eBenefits, eDevelopment, eCompensation, eCompensation Manager, ePay, ePerformance, eProfile, and eProfile Manager. At the bottom of the page, there are 'Save' and 'Notify' buttons, and a navigation bar with the same tabs as the top.

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:

Installation Options | **Contracts**

Processing Options

Currency Conversion Date Accounting Date

Processing Order Template

Limit Options

Reduce by retainage first Summ. Limit for Govt Contracts

Apply retainage upon release Split to Match Limit Exactly

Other Installed Options

Pay/Bill Management Installed Federal Reimbursable Agreement

Defer Line Attributes to Batch Agreement Amount Restricted

Separate Options

Separate Fixed Billing and Revenue Separate As Incurred Billing and Revenue

Revenue Forecast

Calendar SetID SHARE

Detail Calendar MN

Summary Calendar Q2

Accounting Definition Name

Acctg Definition SetID SHARE

Acctg Definition Fix Fee CADEFN

Acctg Definition Projects CAPCDEFN

Acctg Definition TBP CATXNDEFN

Save Notify Refresh

Installation Options | Contracts

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 home page, you must grant the home page personalization security access to all non-guest users.

To update the home page 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 home page 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 home page.

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.

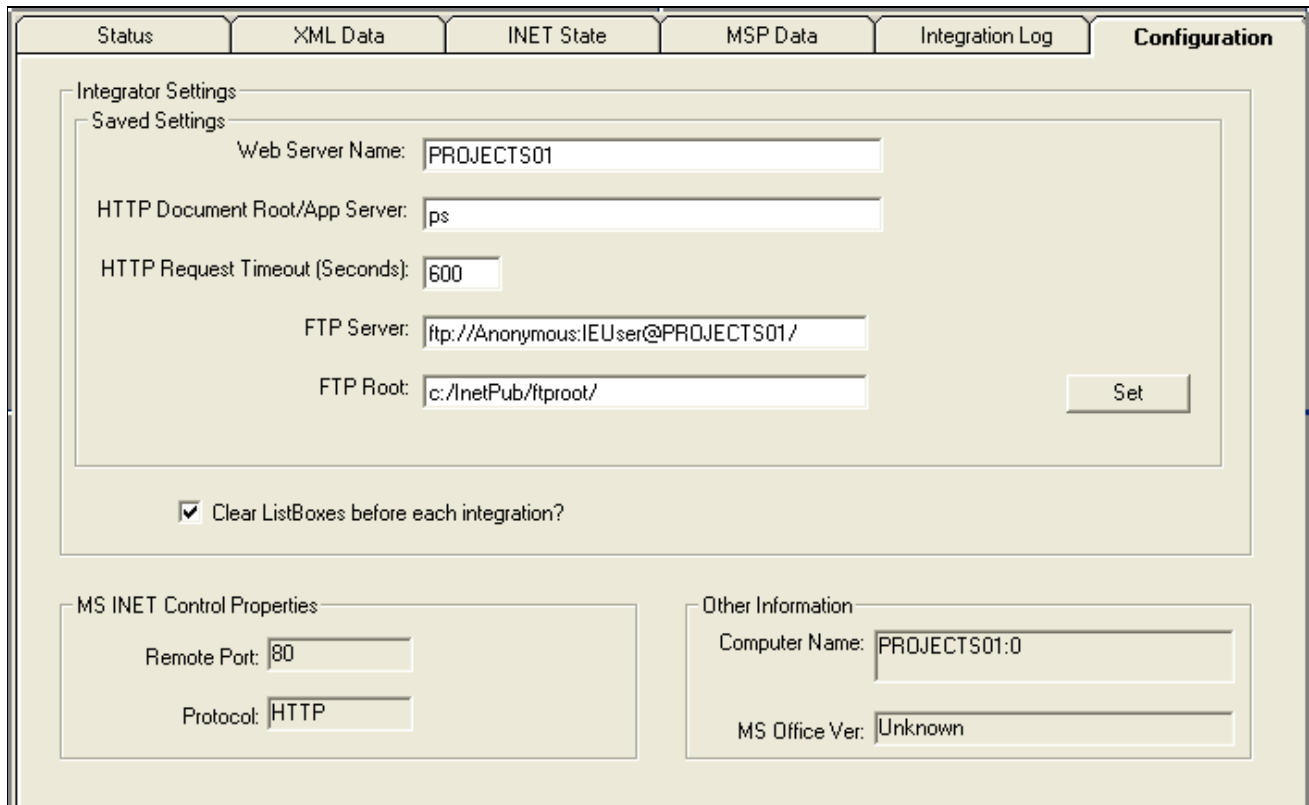
For example:

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.

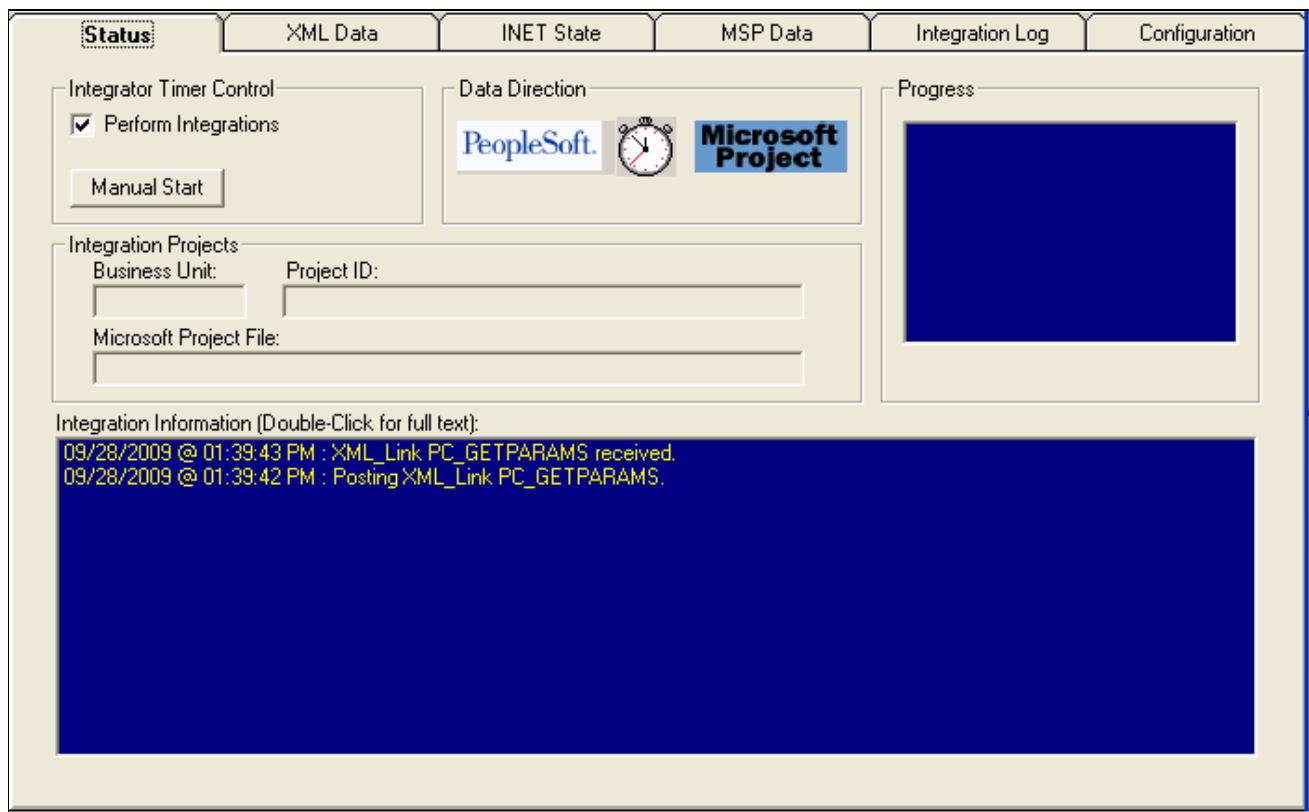
- In the FTP Server field, enter the FTP server that this integrator uses to direct the application server to send the .mpp files for integration.
 - In the FTP Root field, enter the Windows file path to the root location of the FTP server. This is the file path that Microsoft Project uses to find the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

```
sftp://<servername>/
```

Note. Any acceptable PeopleTools URL definition can be used here including *record://* and *https://*.

The following are examples of some valid storage location URLs:

```
record://MYAPP_ATT_CNTNT
```

```
ftps://ftp_user:usr_pwd@ftps.example.com:6000/images
```

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 server.

5. Enter the user ID and encrypted password using the URL Properties page.
6. Click Save.
7. 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.
8. 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 and Oracle.

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:

- DB (database server)
- URL (universal resource locator server)
- FTP (file transfer protocol server)- Use only for legacy attachments.

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.

Note. FTP servers are deprecated and should only be used for legacy attachments. Use URL servers which can be defined as *record://*, *https://*, *sftp://* or *ftp://*.

See PeopleSoft FSCM: Application Fundamentals, "Defining Financials and Supply Chain Management Common Definitions," Defining File Attachments, for instructions on setting up a file attachment server.

While setting up the file attachment server, ensure to accept the default record name PV_ATT_DB_SRV in the Server/Record Name/URL Id field.

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 chapter "Configuring Global Search Using PeopleSoft Search Framework," for details on configuring global search.

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:

The screenshot displays the Staffing Installation page. It features two main sections: 'Apply Online' and '3rd Party Integrations'. The 'Apply Online' section contains five fields: 'Department SetID' (SHARE), 'Employee Self Service Deptid' (10000), 'Default Attachment Type' (REFLT), 'Candidate Registration' (Optional Registration), and 'After Update Status' (Applicant Pending). The '3rd Party Integrations' section includes checkboxes for 'Resume Parsing Provider' and 'Job Board Distributor Provider', along with fields for 'Supplier ID', 'Language Code', 'Default Job Board Distributor', and 'Apply Online URL'. At the bottom, there are three buttons: 'Save', 'Notify', and 'Refresh'.

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:

Apply Online

Department SetID: SHARE

Employee Self Service Deptid: 10000

Default Attachment Type: REFLT

Candidate Registration: Optional Registration

After Update Status: Applicant Pending

3rd Party Integrations

Resume Parsing Provider

Supplier ID: [Dropdown]

Language Code: [Dropdown]

Job Board Distributor Provider

Default Job Board Distributor: [Dropdown]

Apply Online URL: [Text Field]

Save Notify Refresh

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.

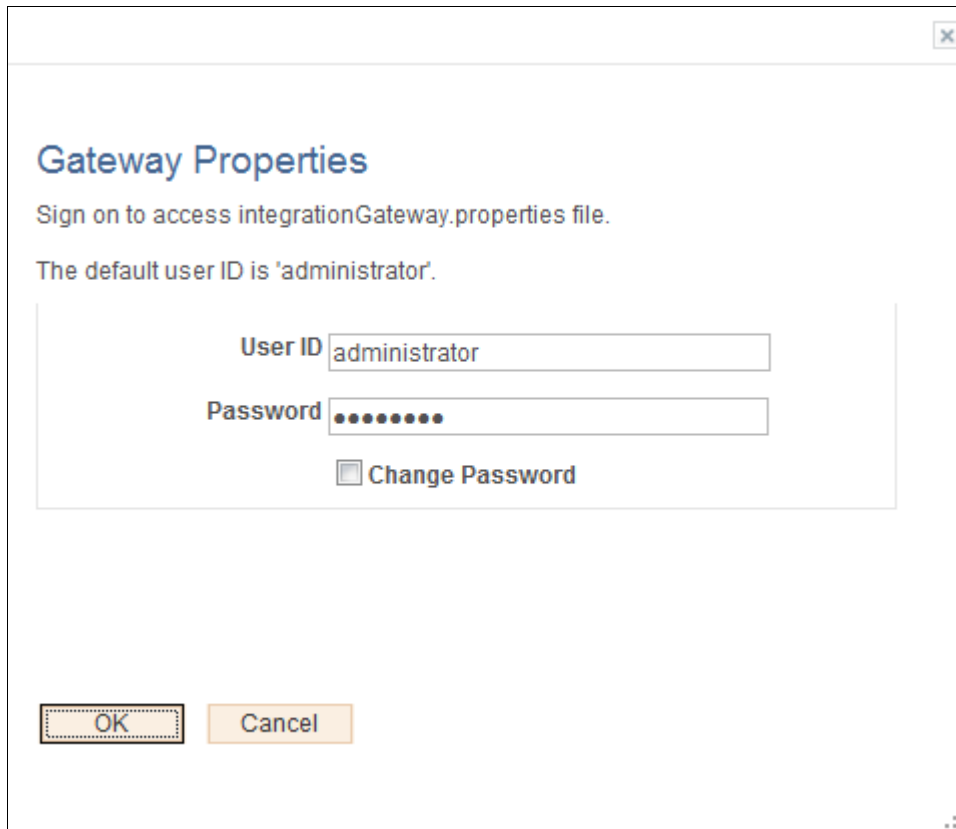
See the "Appendix: Applying Common Installation Instructions," Setting Up Integration Gateways for instructions to set up integration gateway.

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

Sign on to access integrationGateway.properties file.

The default user ID is 'administrator'.

User ID

Password

Change Password

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

URL: http://localhost:8000/PSIGW/PeopleSoftListeningConnector

Gateway Default App. Server

App Server URL: //localhost:9000
 User ID: VP1
 Password: ***
 Tools Release: 8.56-901-R1
 Domain Password: ***
 Virtual Server Node:

PeopleSoft Nodes

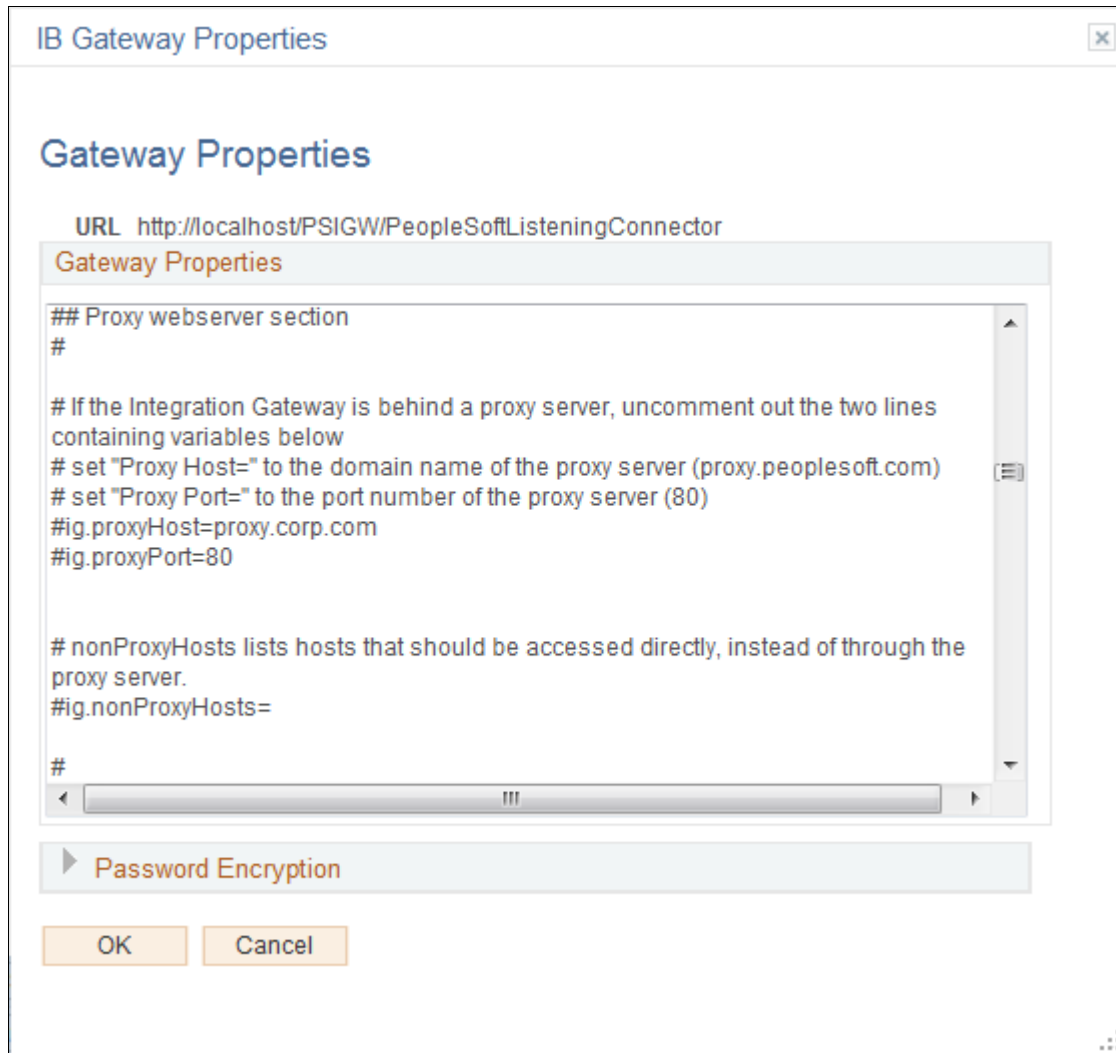
Node Name	App Server URL	User ID	Password	Tools Release	Domain Password	
PSFT_EP	//localhost:9000	VP1	***	8.56-901-R1	***	Ping Node + -
PSFT_HR	//localhost:9000	PS	***	8.56-901-R1	***	Ping Node + -

Advanced Properties Page

OK Cancel Save

PeopleSoft Node Configuration page

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

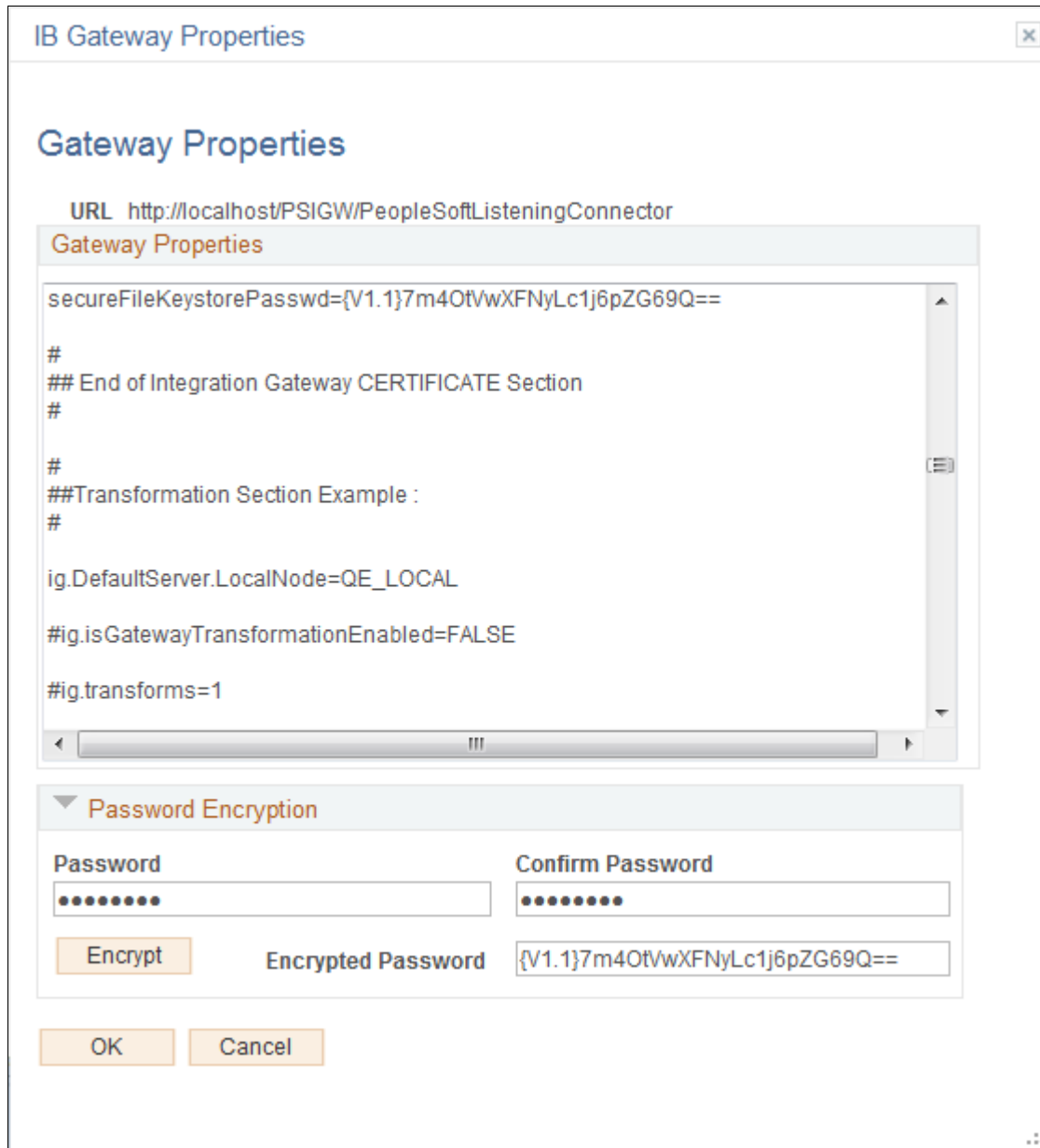


Gateways Properties page

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}7m40tVwXFNyLc1j6pZG69Q==
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_CO DE (String, 50)	COMPETENCY (Unique)	COMPETENCY_CO DE (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.

- 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.

- Repeat these steps for each map.

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

The screenshot shows the 'Elements' tab in the PeopleSoft interface. The 'Map Name' is 'PhoneTypeDVM' and the 'Type' is 'Static'. The description is 'Phone Type DVM'. Below this is a table titled 'Assign Elements to Maps' with the following data:

Order	*Element Name	*Data Type	Length	Required		
1	UniqueGUID	String	36	<input checked="" type="checkbox"/>	+	-
2	PHONE_TYPE	String	4	<input checked="" type="checkbox"/>	+	-
3	PHONE_TP	String	20	<input checked="" type="checkbox"/>	+	-

At the bottom of the form are buttons for 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', 'Export', and 'Delete'. The 'Elements | Domains' breadcrumb is visible at the bottom left.

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.
- 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:

The screenshot displays the 'Domains' tab of a configuration page. At the top, there are two tabs: 'Elements' and 'Domains'. Below them, the 'Map Name' is 'PhoneTypeDVM' and the 'Type' is 'Domain Value Map (static)'. The main area is titled 'Assign Domains to Value Maps' and contains three distinct sections, each representing a domain:

- Domain 1:** Domain Name: HRXML, Is Unique: . Below it is a table 'Assign Elements to the Domain' with one row: '1' | PHONE_TP | + | -.
- Domain 2:** Domain Name: PSFT, Is Unique: . Below it is a table 'Assign Elements to the Domain' with one row: '1' | PHONE_TYPE | + | -.
- Domain 3:** Domain Name: UniqueGUID, Is Unique: . Below it is a table 'Assign Elements to the Domain' with one row: '1' | UniqueGUID | + | -.

At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'. The breadcrumb 'Elements | Domains' is visible at the bottom left.

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:

The screenshot shows the 'Elements' page with the following details:

- Map Name:** CountryCodeXREF
- Type:** Dynamic
- *Description:** Country Code XREF
- Comments:** (Empty text area)
- Assign Elements to Maps Table:**

Order	*Element Name	*Data Type	Length	Required		
1	UniqueGUID	String	36	<input checked="" type="checkbox"/>	+	-
2	COUNTRY	String	3	<input checked="" type="checkbox"/>	+	-
3	COUNTRYCODE	String	3	<input checked="" type="checkbox"/>	+	-
- Buttons:** Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display, Export, Delete.

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:

The screenshot displays the 'Domains' tab in the PeopleSoft interface. At the top, the 'Map Name' is 'CountryCodeXREF' and the 'Type' is 'Cross-reference (dynamic)'. Below this, there are three main sections for assigning domains to value maps:

- Assign Domains to Value Maps:** This section has a header 'Assign Domains to Value Maps' and 'Find | View 1' with navigation arrows. It shows a text input for '*Domain Name' containing 'HRXML' and a checked 'Is Unique' checkbox. Below this is a sub-section 'Assign Elements to the Domain' with 'Personalize | Find | View All | [?] | [grid]' and 'First 1 of 1 Last'. It contains a table with one row: '1' | 'COUNTRYCODE' | '+ | -'.
- Second Domain:** This section has a text input for '*Domain Name' containing 'PSFT' and a checked 'Is Unique' checkbox. It also has a sub-section 'Assign Elements to the Domain' with a table row: '1' | 'COUNTRY' | '+ | -'.
- Third Domain:** This section has a text input for 'Domain Name' containing 'UniqueGUID' and a checked 'Is Unique' checkbox. It has a sub-section 'Assign Elements to the Domain' with a table row: '1' | 'UniqueGUID' | '+ | -'.

At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. The 'Elements | Domains' breadcrumb is visible at the very bottom.

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

Map Name CountryCodeXREF Domain Name HRXML

Mapping Values

Mapping Setup Personalize | Find | View 100 | First 1-5 of 240 Last

	Select	Country	Description
1	Select	ABW	Aruba
2	Select	AFG	Afghanistan
3	Select	AGO	Angola
4	Select	AIA	Anguilla
5	Select	ALB	Albania

Mapping Setup Values Personalize | Find | View All | First 1 of 1 Last

Sequence Number	Country
1	

Save Return to Search Notify Refresh

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.

- 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

Queue Name: CONTRACT

Description: Contracts

Comments: [Empty text area]

Archive: Archive Unordered

Queue Status: Run

Owner ID: Contracts

Operations Assigned to Queue

Service Operation	Version
CONTRACT_REQUEST	VERSION_1
CONTRACT_RESPONSE	VERSION_1
CONTRACT_TXN	VERSION_1
CONTRACT_TXN	VERSION_2
PENDING_ACTIVITY	VERSION_1

Define Partitioning Fields

Include	Field	Alias Name
<input type="checkbox"/>	OPERATIONNAME	[Empty text box]
<input type="checkbox"/>	PUBLISHER	[Empty text box]
<input type="checkbox"/>	PUBPROC	[Empty text box]

Buttons: Save, Add Field, Return to Search, Notify, Add, Update/Display

Queue Definitions page

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

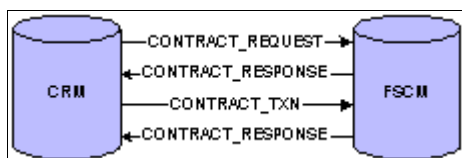
As a prerequisite, you must know which databases you are integrating. In the example of CONTRACT_REQUEST, the sender node will be the PeopleSoft CRM database and the receiver node will be the PeopleSoft FSCM database. The receiver node is always the target database. In the case of CONTRACT_RESPONSE,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

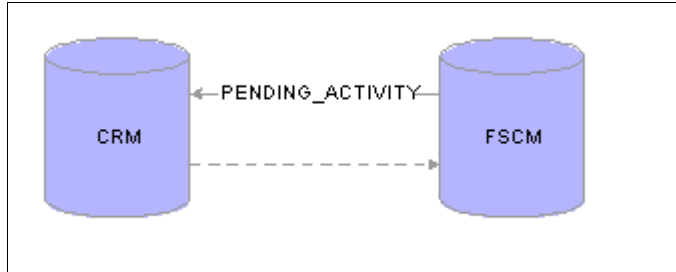
For Recurring and One-Time transactions, this message is sent only once. For On-Demand Transactions, the system sends this message for a second time, after the Contracts Billing Interface (CA_BI_INTFC) process completes, to provide the status of the transactions to PeopleSoft CRM.

3. PeopleSoft CRM sends CONTRACT_TXN to PeopleSoft FSCM, as shown in the following database integration diagram:



Database Integration diagram

- 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

- 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):

- Sign in to PeopleSoft Pure Internet Architecture.
- Select PeopleTools, Integration Broker, Integration Setup, Services.
- On the Services search page, search for and select the service name `CONTRACT_REQUEST`.
- 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:

The screenshot displays the 'Services - Search' interface. At the top, there is a 'Search Criteria' section with a text input field containing 'CONTRACT' and a search icon. Below the input field is a checkbox labeled 'REST Service'. A 'Search' button is located to the left of the input field. To the right of the input field is a link that says 'Add a New Value'. Below the search criteria is a table titled 'Services' with columns for 'Service', 'Service Alias', 'Object Owner ID', and 'Description'. The table contains three rows of data.

Service	Service Alias	Object Owner ID	Description
CONTRACT_REQUEST		Contracts	Contract Request
CONTRACT_RESPONSE		Contracts	Contract Response
CONTRACT_TXN		Contracts	Contract Transactions

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 **CONTRACT_REQUEST** REST Service Type

*Description

Comments

Service Alias

Owner ID

*Namespace

[Link Existing Operations](#) [View WSDL](#) [Provide Web Service](#)

Service Operations

Service Operation

Operation Type

Existing Operations [Personalize](#) | [Find](#) | [View All](#) | | First 1 of 1 Last

Operation	Message Links			
Operation.Default Version		Description	Active	Operation Type
CONTRACT_REQUEST.VERSION_1		Contract Request	<input type="checkbox"/>	Asynch

 [Return to Search](#)

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:

General | Handlers | Routings

Service Operation CONTRACT_REQUEST
Operation Type Asynchronous - One Way
***Operation Description** Contract Request
Operation Comments
 User/Password Required
***Req Verification** None
[Service Operation Security](#)
Owner ID Contracts
Operation Alias

Default Service Operation Version

***Version** VERSION_1 **Default** **Active**
Version Description Contract Request
Version Comments
Runtime Schema Validation
 Request Message
 Non-Repudiation

Routing Status

Any-to-Local	Exists
Local-to-Local	Does not exist
Local-to-Atom	Does not exist.

Routing Actions Upon Save

Regenerate Any-to-Local
 Generate Local-to-Local
Warning Regenerating sets all routing field values to their initial state.

Message Information

Type Request
Message.Version CONTRACT_REQUEST.VERSION_1 [View Message](#)
***Queue Name** CONTRACT [View Queue](#) [Add New Queue](#)

[Save](#) [Return to Service](#) [Add Version](#)

General | Handlers | Routings

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.

The screenshot shows the 'Handlers' tab of the Service Operation page for 'CONTRACT_REQUEST'. The page displays the following information:

- Service Operation:** CONTRACT_REQUEST
- Default Version:** VERSION_1
- Operation Type:** Asynchronous - One Way

A table titled 'Handlers' contains the following data:

*Name	*Type	Sequence	*Implementation	*Status	
1 ContractRequest	On Notify		Application Class	Active	Details + -

Buttons for 'Save' and 'Return to Service' are located below the table. The bottom of the page shows navigation links: 'General | Handlers | Routings'.

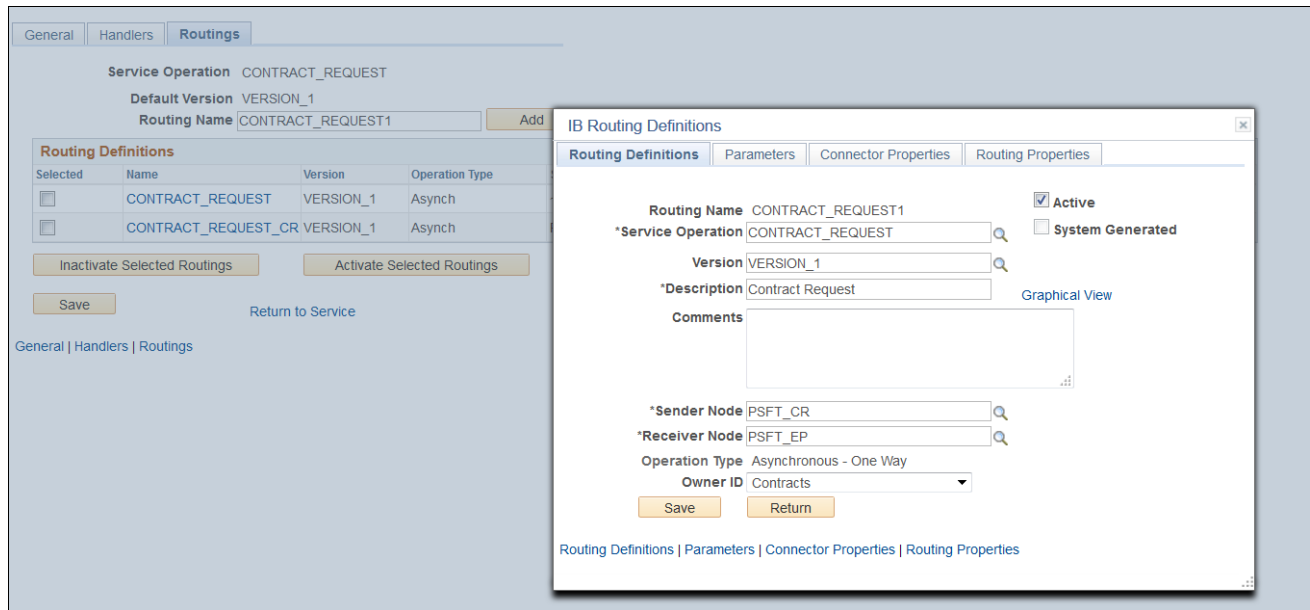
Service Operation page: Handlers tab

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:

The screenshot displays the 'General' tab of the Service Operation page for 'CONTRACT_TXN'. The page is organized into several sections:

- Service Operation Details:**
 - Service Operation: CONTRACT_TXN
 - Operation Type: Asynchronous - One Way
 - *Operation Description: Contract Transactions
 - Operation Comments: (Empty text area)
 - Owner ID: Contracts
 - Operation Alias: (Empty text area)
 - User/Password Required:
 - *Req Verification: None
 - Service Operation Security: (Link)
- Default Service Operation Version:**
 - *Version: VERSION_2
 - Version Description: Contract Transactions
 - Version Comments: (Empty text area)
 - Default:
 - Active:
 - Routing Status:**
 - Any-to-Local: Exists
 - Local-to-Local: Does not exist
 - Local-to-Atom: Does not exist
 - Runtime Schema Validation:**
 - Request Message:
 - Non-Repudiation:
 - Routing Actions Upon Save:**
 - Regenerate Any-to-Local:
 - Generate Local-to-Local:
 - Warning: Regenerating sets all routing field values to their initial state.
- Message Information:**
 - Type: Request
 - Message.Version: CONTRACT_TXN.VERSION_2 (with search icon and 'View Message' link)
 - *Queue Name: CONTRACT (with search icon and 'View Queue' link)
 - Add New Queue: (Link)
- Non-Default Versions:**
 - Personalize | Find | [Icons] | First | 1 of 1 | Last

Version	Description	Active
VERSION_1	Contract Transactions	<input type="checkbox"/>

At the bottom of the page, there are buttons for 'Save', 'Return to Service', and 'Add Version', along with navigation links for 'General | Handlers | Routings'.

Service Operation page: General tab

- 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

Service Operation	CONTRACT_TXN	<input type="checkbox"/> Default	<input checked="" type="checkbox"/> Active
Service	CONTRACT_TXN		
Service Operation Version	VERSION_1		
Operation Type	Asynchronous - One Way		
Description	<input type="text" value="Contract Transactions"/>		
Comments	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>		

Runtime Schema Validation

Request Message

Non-Repudiation

Routing Actions Upon Save

Generate Any-to-Local

Generate Local-to-Local

Generate Local-to-Atom

Message Information

Type	Request	
Message Version	<input type="text" value="CONTRACT_TXN.VERSION_1"/>	View Message
*Queue Name	<input type="text" value="CONTRACT"/>	View Queue Add New Queue

Service Operation Mappings

Mappings to and from the default service operation version: VERSION_2 Request Message

CONTRACT_TXN.VERSION_2

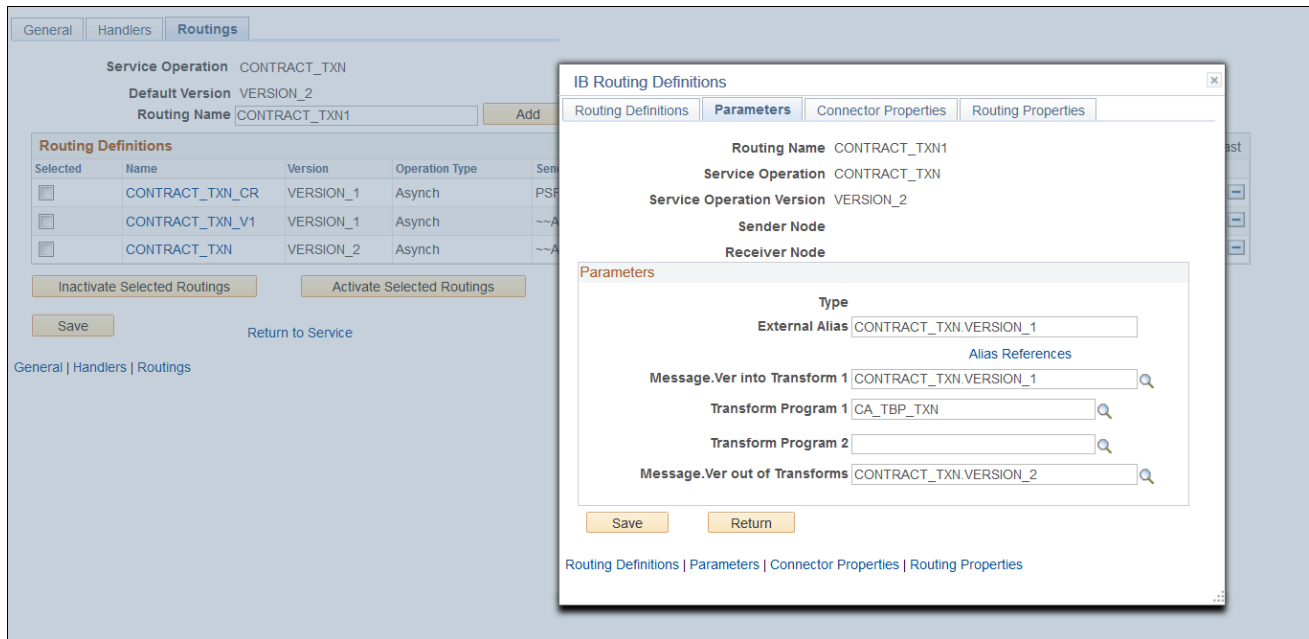
Transform To Default

[Service Operation Versions](#) | [Service Operation Versions](#)

Service Operation Version page

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

- 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

- Click Save.
- 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.

- 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:

The screenshot displays the 'Process Definition Options' page for the process 'WM_MSP'. The page is titled 'Processes' and is part of the 'Employee Self Service' application. The 'Process Definition Options' tab is selected. The page contains several sections:

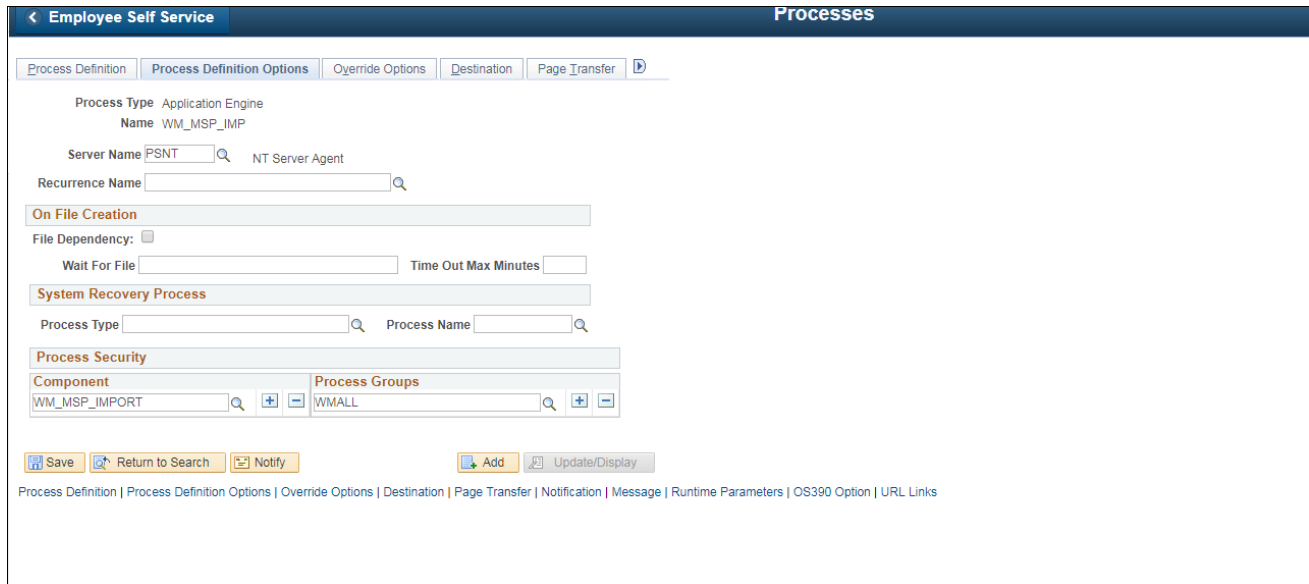
- Process Type:** Application Engine
- Name:** WM_MSP
- Server Name:** PSNT (with a search icon)
- Recurrence Name:** (with a search icon)
- On File Creation:** File Dependency: Wait For File: (with a search icon) Time Out Max Minutes: 5
- System Recovery Process:** Process Type: (with a search icon) Process Name: (with a search icon)
- Process Security:** Component: WM_MSP (with a search icon and a plus icon) Process Groups: WMALL (with a search icon, a plus icon, and a minus icon)

At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'. A breadcrumb trail at the very bottom reads: 'Process Definition | Process Definition Options | Override Options | Destination | Page Transfer | Notification | Message | Runtime Parameters | OS390 Option | URL Links'.

Process Definition Options page for process name WM_MSP

- Click Save.
- Select PeopleTools, Process Scheduler, Processes.
The Process search page appears.
- On the Process search page, search for and select process name *WM_MSP_IMP*.
The Process Definition page appears.
- 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

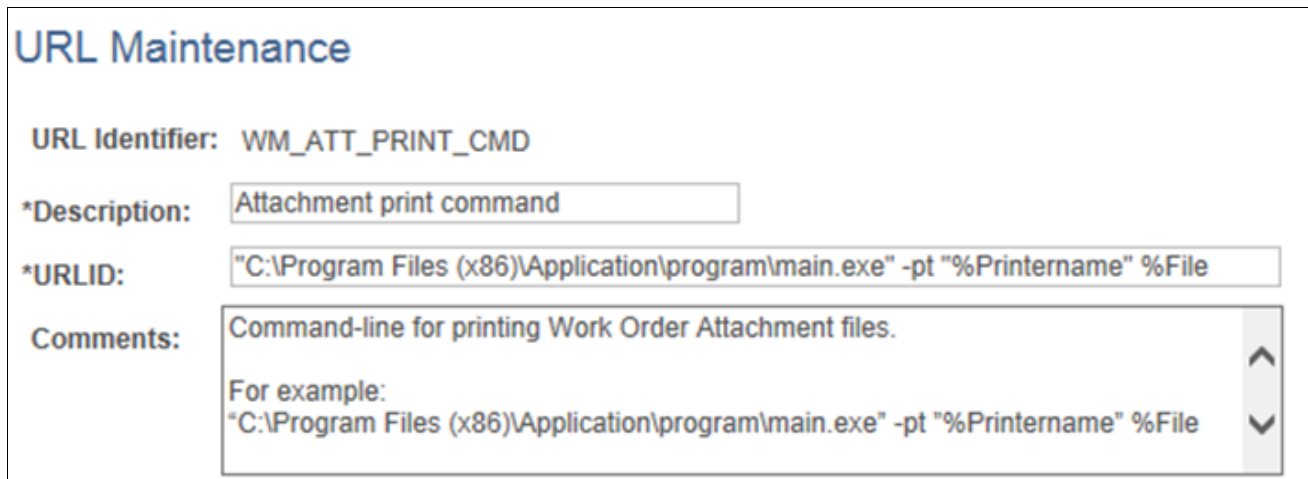
After you install the additional component application, you must update the URL that is used by the PeopleSoft Work Order Attachment Print feature to call the additional component application to print attachments.

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:



The screenshot shows the 'URL Maintenance' page with the following details:

- URL Identifier:** WM_ATT_PRINT_CMD
- *Description:** Attachment print command
- *URLID:** "C:\Program Files (x86)\Application\program\main.exe" -pt "%Printrname" %File
- Comments:** Command-line for printing Work Order Attachment files. For example: "C:\Program Files (x86)\Application\program\main.exe" -pt "%Printrname" %File

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 "%Printrname" %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 %Printrname 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

URL Identifier: `WM_ATT_PRINT_DIR`

*Description:

*URLID:

Comments:

This URL ***MUST*** end with a path delimiter, such as "\".
For example: `C:\WMONLATT\`

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.

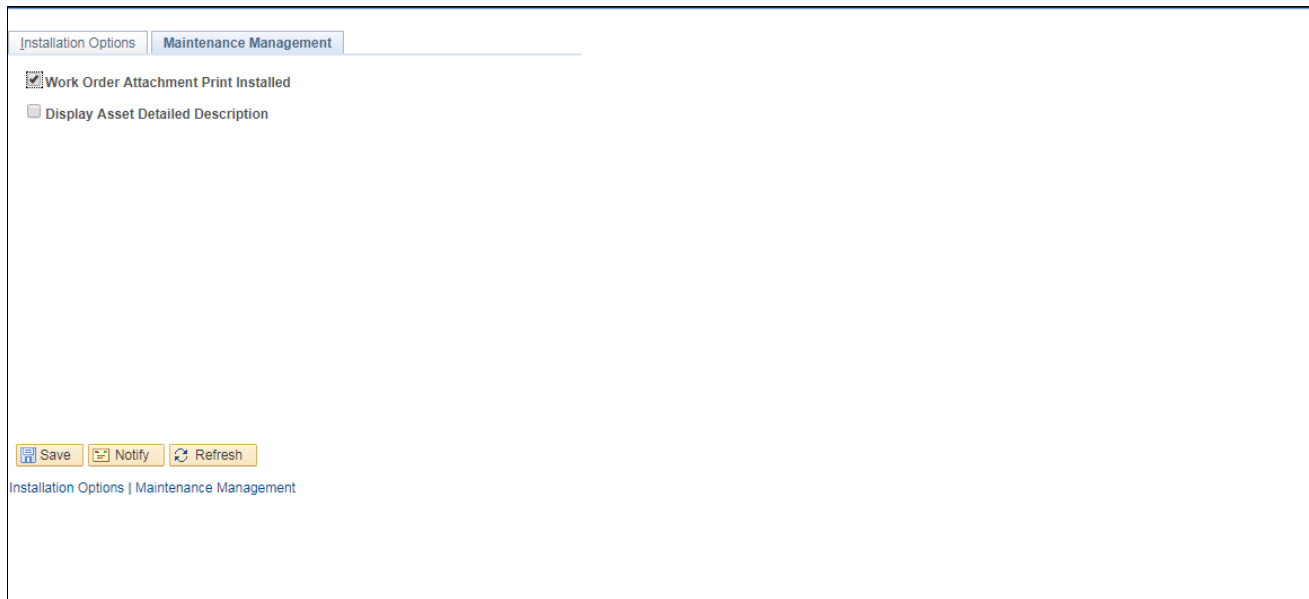
Task 16-2: Enabling the PeopleSoft Work Order Attachment Print Features

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.

- 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:

The screenshot displays the 'Node Definitions' page for the node 'PSFT_XINBND'. The page has a navigation bar with tabs for 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and 'Routings'. The main form contains the following fields and options:

- Node Name:** PSFT_XINBND
- *Description:** External Inbound node
- *Node Type:** External (dropdown menu)
- *Authentication Option:** None (dropdown menu)
- *Default User ID:** VP1
- WSIL URL:** (empty text field)
- Hub Node:** (empty text field with search icon)
- Master Node:** (empty text field with search icon)
- Company ID:** (empty text field)
- IB Throttle Threshold:** (empty text field)
- Image Name:** (empty text field with search icon)
- Codeset Group Name:** (empty text field with search icon)
- External User ID:** (empty text field)
- External Password:** (empty text field)
- Confirm External Password:** (empty text field)
- External Version:** (empty text field)

On the right side, there are three buttons: 'Copy Node', 'Rename Node', and 'Delete Node'. Below the form, there are links for 'Contact/Notes' and 'Properties', a 'Save' button, and a 'Return to Search' button. At the bottom, there is a breadcrumb trail: 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Definitions - PSFT_XINBND page

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

- 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:

The screenshot displays the 'Node Definitions' page for a node named 'ANONYMOUS'. The page is organized into several sections:

- Navigation:** Tabs for 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and 'Routings' are at the top.
- Node Information:**
 - Node Name:** ANONYMOUS
 - *Description:** Used internally by IB system.
 - *Node Type:** External (dropdown menu)
 - *Authentication Option:** None (dropdown menu)
 - *Default User ID:** VP1
 - WSIL URL:** (empty text field)
 - Hub Node:** (empty text field with search icon)
 - Master Node:** (empty text field with search icon)
 - Company ID:** (empty text field)
 - IB Throttle Threshold:** (empty text field)
 - Image Name:** (empty text field with search icon)
 - Codeset Group Name:** (empty text field with search icon)
 - External User ID:** (empty text field)
 - External Password:** (empty text field)
 - Confirm External Password:** (empty text field)
 - External Version:** (empty text field)
- Properties:**
 - Default Local Node
 - Local Node
 - Active Node
 - Non-Repudiation
 - Segment Aware
- Actions:**
 - Copy Node
 - Rename Node
 - Delete Node
 - Save
 - Return to Search
- Footer:** A breadcrumb trail: Node Definitions | Connectors | Portal | WS Security | Routings

Node Definitions - Anonymous page

- Click Save.

Task 17-2: Activating Service Operations

To activate service operations:

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

- 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:

The screenshot displays the 'Service Operations - General' configuration page. At the top, there are tabs for 'General', 'Handlers', and 'Routings'. The main configuration area includes:

- Service Operation:** GET_PIDATA
- Operation Type:** Asynchronous - One Way
- *Operation Description:** AM Physical Inventory Request
- Operation Comments:** AM Physical Inventory Request Details
- Owner ID:** Asset Management
- Operation Alias:** (empty field)
- Service Operation Security:** Includes a checkbox for 'User/Password Required' and a dropdown for '*Req Verification' set to 'None'.

The 'Default Service Operation Version' section contains:

- *Version:** v1
- Version Description:** AM Physical Inventory Request
- Version Comments:** (empty text area)
- Default:** (checked)
- Active:** (checked)

Additional configuration options include:

- Runtime Schema Validation:**
 - Request Message
 - Non-Repudiation
- Routing Status:**
 - Any-to-Local: Does not exist
 - Local-to-Local: Does not exist
 - Local-to-Atom: Does not exist
- Routing Actions Upon Save:**
 - Generate Any-to-Local
 - Generate Local-to-Local

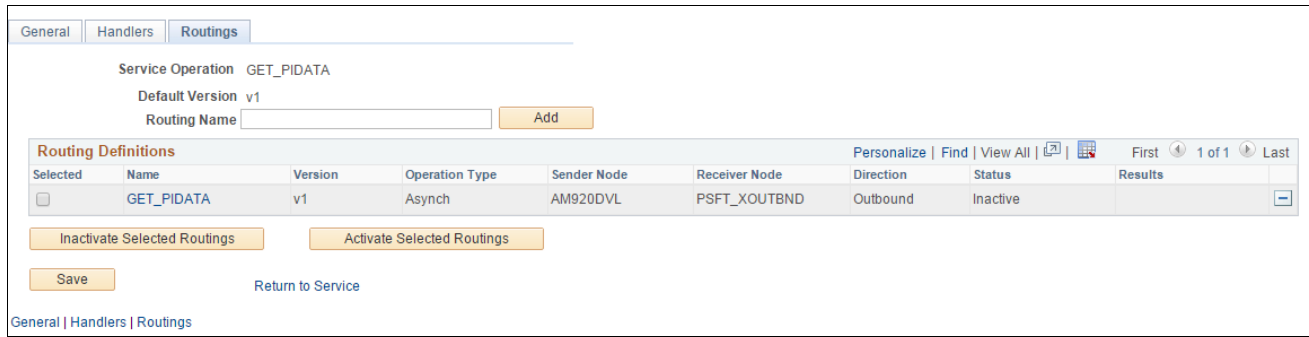
The 'Message Information' section at the bottom shows:

- Type:** Request
- Message.Version:** GET_PIDATA.VERSION_1 (with a search icon and a 'View Message' link)
- *Queue Name:** ASSET_MANAGEMENT (with a search icon, a 'View Queue' link, and an 'Add New Queue' link)

Service Operations - General page

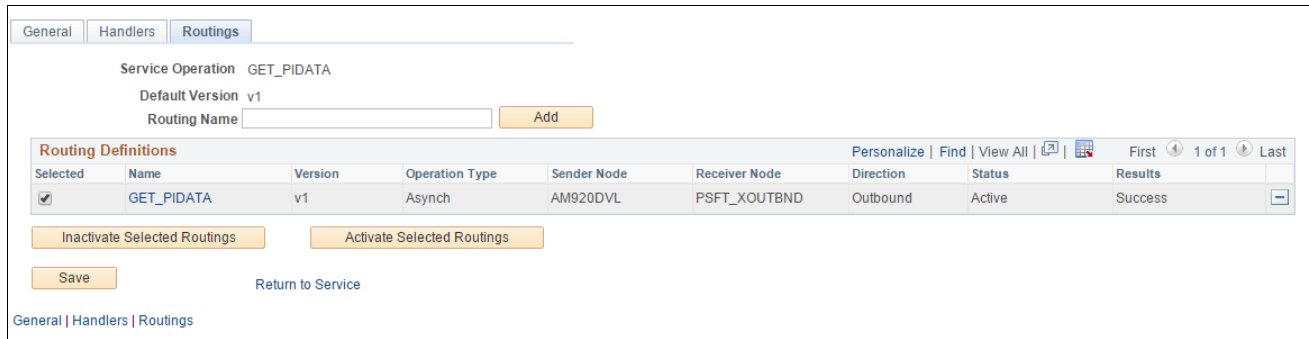
- On the General page, select the Active check box, and then click Save.
- On the Save Message dialog box, click OK.

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:

The screenshot displays the 'General' tab of the Service Operations configuration page for the service operation *GET_PIDATA_ACK*. The page is organized into several sections:

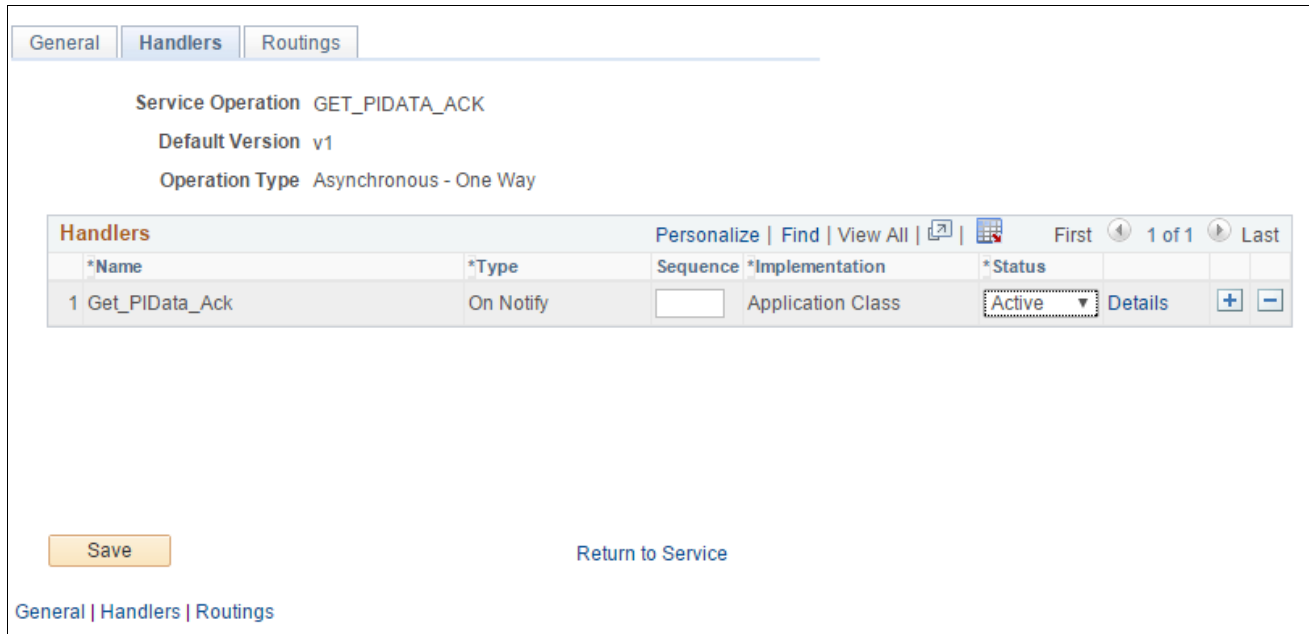
- Service Operation Details:**
 - Service Operation:** GET_PIDATA_ACK
 - Operation Type:** Asynchronous - One Way
 - *Operation Description:** Get Physical Inv Data Response
 - Operation Comments:** Get Physical Inventory Data Response from third party vendor
 - Owner ID:** Asset Management
 - Operation Alias:** (empty field)
- Service Operation Security:**
 - User/Password Required
 - *Req Verification:** None
- Default Service Operation Version:**
 - *Version:** v1
 - Version Description:** Get Physical Inv Data Response
 - Version Comments:** Get Physical Inventory Data Response from third party vendor
 - Default
 - Active
- Routing Status:**
 - Any-to-Local: Does not exist
 - Local-to-Local: Does not exist
 - Local-to-Atom: Does not exist
- Runtime Schema Validation:**
 - Request Message
 - Non-Repudiation
- Routing Actions Upon Save:**
 - Generate Any-to-Local
 - Generate Local-to-Local
- Message Information:**
 - Type:** Request
 - Message.Version:** GET_PIDATA_ACK.v1
 - *Queue Name:** ASSET_MANAGEMENT
 - Buttons: View Message, View Queue, Add New Queue

At the bottom of the page, there are navigation buttons: Save, Return to Service, and Add Version. The breadcrumb trail at the bottom left reads: General | Handlers | Routings.

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.

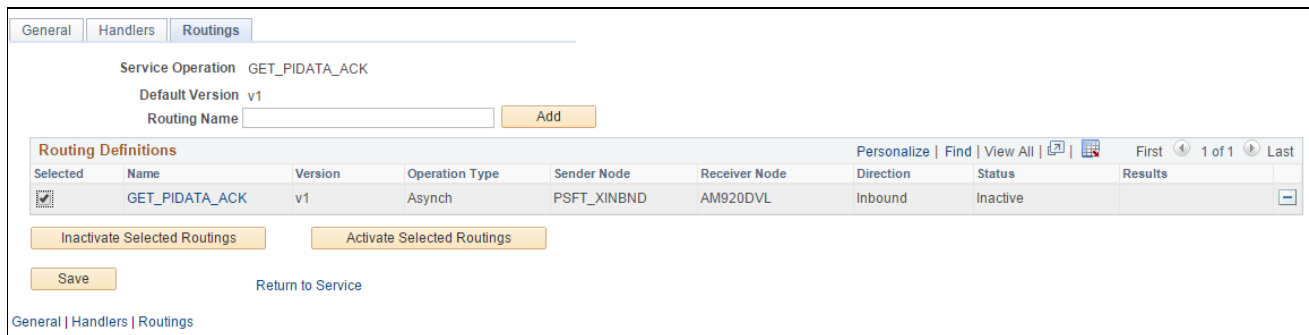
12. Select the Handlers tab to access the Handlers page, as shown in the following example:



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.

- 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

Queue Name: ASSET_MANAGEMENT
 Description: Channel for Asset/IT Assets
 Comments:
 Purge Data

Archive Unordered
 Queue Status: Run
 Owner ID: Asset Management

Operations Assigned to Queue

Service Operation	Version
ADD_ASSET_PUB	VERSION_1
ADD_EMP_PUB	VERSION_1
ADD_PROP_PUB	VERSION_1
GET_DISCOVERYDATA	VERSION_1
GET_DISCOVERYDATA_ACK	VERSION_1
GET_DISCOVERYDATA_STATUS_ACK	VERSION_1
GET_PIDATA	v1
GET_PIDATA_ACK	v1
IT_SYNC_ASSET_UPDATE	v1
LST_DELETEDPROPS_REQ	VERSION_1

Queue Definitions page

- On the Queue Definitions page, verify that the Queue Status is set to *Run*.
- If the Queue Status is Paused, select *Run* from the Queue Status drop-down list box.
- Click Save.
- 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:

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

```

-----
Quick-configure menu -- domain: TEST
-----
      Features
      =====
1> Pub/Sub Servers   : Yes   17> DBNAME      : [TEST ]
2> Quick Server     : No    18> DBTYPE     : [ORACLE]
3> Query Servers    : No    19> UserId     : [QEDMO ]
4> Jolt             : Yes   20> UserPswd  : [ ]
5> Jolt Relay       : No    21> DomainID  : [TESTSERU]
6> WSL              : No    22> AddToPATH : [C:\oracle\product\11.2.0\client
1\bin]
7> PC Debugger      : Yes   23> ConnectID : [people ]
8> Event Notification: Yes  24> ConnectPswd: [ ]
9> MCF Servers      : No    25> DomainConnectPswd: [ ]
10> Perf Collator   : No    26> WSL Port  : [7000 ]
11> Analytic Servers : Yes  27> JSL Port  : [9000 ]
12> Domains Gateway : No    28> JRAD Port : [9100 ]
13> Push Notifications: No

      Actions
      =====
14> Load config as shown
15> Custom configuration
16> Edit environment settings
   h> Help for this menu
   q> Return to previous 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*.

- 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:

The screenshot displays the 'Node Definitions' page for the node 'PSFT_XINBND'. The page is organized into several sections:

- Navigation:** Tabs for 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and 'Routings' are located at the top.
- Node Information:** Fields include 'Node Name' (PSFT_XINBND), '*Description' (External Inbound node), and '*Node Type' (External). There are also checkboxes for 'Default Local Node', 'Local Node', 'Active Node', 'Non-Repudiation', and 'Segment Aware'.
- Authentication:** '*Authentication Option' is set to 'None'.
- User and Security:** '*Default User ID' is set to 'VP1'. Other fields include 'WSIL URL', 'Hub Node', 'Master Node', 'Company ID', 'IB Throttle Threshold', 'Image Name', 'Codeset Group Name', 'External User ID', 'External Password', 'Confirm External Password', and 'External Version'.
- Actions:** Buttons for 'Copy Node', 'Rename Node', and 'Delete Node' are on the right. A 'Save' button is at the bottom left, and a 'Return to Search' button is at the bottom left.
- Footer:** A breadcrumb trail at the bottom reads 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Definitions page for PSFT_XINBND

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

- 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:

The screenshot displays the 'Node Definitions' page for the 'ANONYMOUS' node. The page is organized into several sections:

- Navigation:** Tabs for 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and 'Routings' are at the top.
- Node Information:**
 - Node Name:** ANONYMOUS
 - *Description:** Used internally by IB system.
 - *Node Type:** External (dropdown menu)
 - *Authentication Option:** None (dropdown menu)
 - *Default User ID:** VP1
 - WSIL URL:** (empty text field)
 - Hub Node:** (empty text field)
 - Master Node:** (empty text field)
 - Company ID:** (empty text field)
 - IB Throttle Threshold:** (empty text field)
 - Image Name:** (empty text field)
 - Codeset Group Name:** (empty text field)
 - External User ID:** (empty text field)
 - External Password:** (empty text field)
 - Confirm External Password:** (empty text field)
 - External Version:** (empty text field)
- Properties:**
 - Default Local Node
 - Local Node
 - Active Node
 - Non-Repudiation
 - Segment Aware
- Actions:** Buttons for 'Copy Node', 'Rename Node', and 'Delete Node' are on the right side.
- Footer:** A 'Save' button is at the bottom left, and a 'Return to Search' button is at the bottom left. Navigation links for 'Node Definitions | Connectors | Portal | WS Security | Routings' are at the bottom.

Node Definitions page for ANONYMOUS

- Click Save.

Task 18-2: Activating Service Operations

To activate service operations:

- Select PeopleTools, Integration Broker, Integration Setup, Service Operations.
- 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:

The screenshot displays the 'General' tab of the Service Operations configuration page for 'PROCESS_DISCOVERYDATA'. The 'Active' checkbox is checked. The 'Default Service Operation Version' section shows 'v1' as the version, which is also marked as 'Default' and 'Active'. The 'Routing Status' table shows 'Any-to-Local', 'Local-to-Local', and 'Local-to-Atom' all as 'Does not exist'. The 'Runtime Schema Validation' section has 'Request Message' and 'Non-Repudiation' unchecked. The 'Message Information' section shows 'Type: Request', 'Message.Version: PROCESS_DISCOVERYDATA.v1', and '*Queue Name: ASSET_MANAGEMENT'. Navigation buttons include 'Save', 'Return to Service', and 'Add Version'.

Routing Status	
Any-to-Local	Does not exist
Local-to-Local	Does not exist
Local-to-Atom	Does not exist

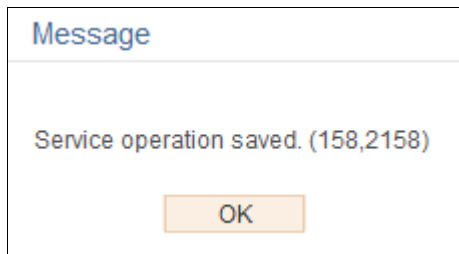
Runtime Schema Validation	
<input type="checkbox"/> Request Message	
<input type="checkbox"/> Non-Repudiation	

Message Information	
Type	Request
Message.Version	PROCESS_DISCOVERYDATA.v1
*Queue Name	ASSET_MANAGEMENT

Service Operations: General page

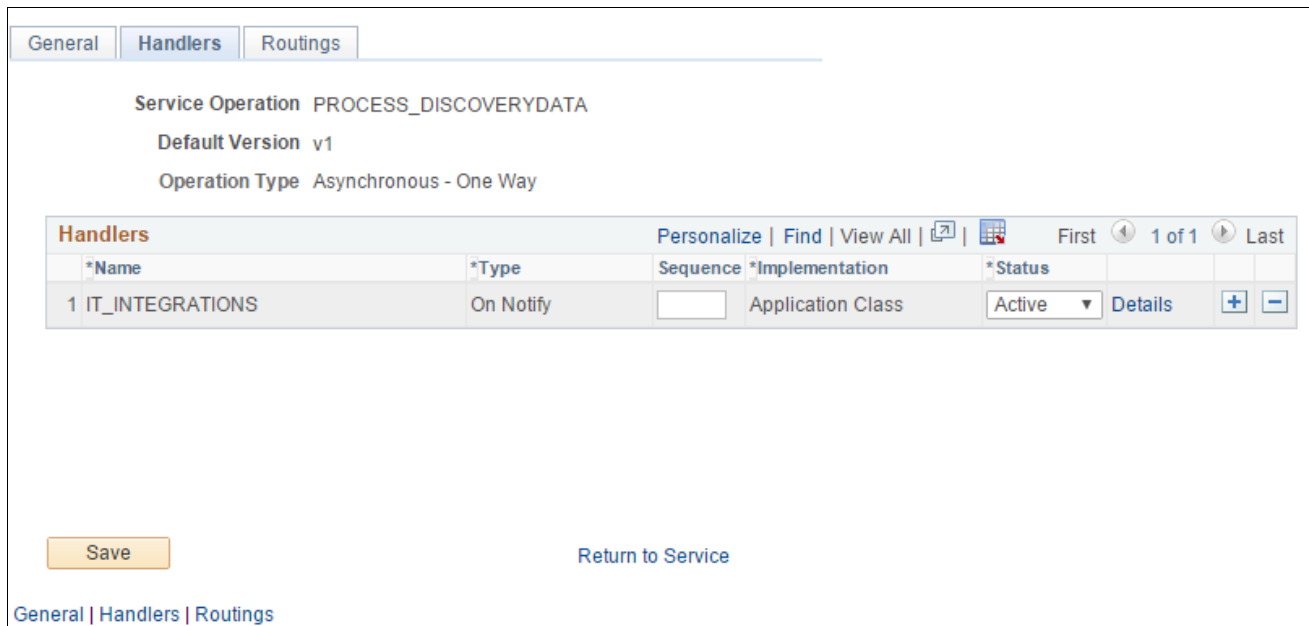
- 4. Click Save.

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



Service Operation: Saved Message page

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



Service Operations: Handlers page

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

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

Service Operation PROCESS_DISCOVERYDATA
Default Version v1
Routing Name

Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results
<input checked="" type="checkbox"/>	PROCESS_DISCOVERYDATA	v1	Asynch	PSFT_XINBND	AM920DVL	Inbound	Inactive	

[Return to Service](#)

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.

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

Queue Definitions

Queue Name: ASSET_MANAGEMENT
 Description: Channel for Asset/IT Assets
 Comments:
 Purge Data

Archive Unordered
 Queue Status: Run
 Owner ID: Asset Management

Operations Assigned to Queue

Service Operation	Version
ADD_ASSET_PUB	VERSION_1
ADD_EMP_PUB	VERSION_1
ADD_PROP_PUB	VERSION_1
GET_DISCOVERYDATA	VERSION_1
GET_DISCOVERYDATA_ACK	VERSION_1
GET_DISCOVERYDATA_STATUS_ACK	VERSION_1
GET_PIDATA	v1
GET_PIDATA_ACK	v1
IT_SYNC_ASSET_UPDATE	v1
LST_DELETEDPROPS_REQ	VERSION_1

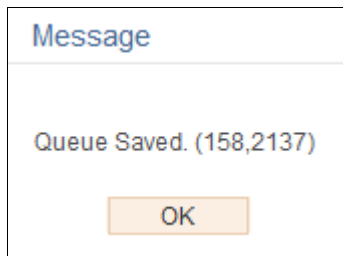
Define Partitioning Fields

Include	Field	Alias Name
<input type="checkbox"/>	OPERATIONNAME	<input type="text"/>
<input type="checkbox"/>	PUBLISHER	<input type="text"/>
<input type="checkbox"/>	PUBPROC	<input type="text"/>

Buttons: Save, Add Field, Return to Search, Notify, Add, Update/Display

Queue Definition

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



Queue Saved Message

- 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:

```

-----
Quick-configure menu -- domain: TEST
-----
          Features                               Settings
          =====                               =====
1) Pub/Sub Servers      : Yes   17) DBNAME       : [TEST ]
2) Quick Server        : No    18) DBTYPE      : [ORACLE]
3) Query Servers       : No    19) UserId      : [QEDMO ]
4) Jolt                : Yes   20) UserPswd   : [ ]
5) Jolt Relay          : No    21) DomainID   : [TESTSERU ]
6) WSL                 : No    22) AddToPATH  : [C:\oracle\product\11.2.0\client
1\bin]
7) PC Debugger         : Yes   23) ConnectID  : [people ]
8) Event Notification : Yes   24) ConnectPswd: [ ]
9) MCF Servers         : No    25) DomainConnectPswd: [ ]
10) Perf Collator     : No    26) WSL Port   : [7000 ]
11) Analytic Servers  : Yes   27) JSL Port   : [9000 ]
12) Domains Gateway   : No    28) JRAD Port  : [9100 ]
13) Push Notifications: No

          Actions
          =====
14) Load config as shown
15) Custom configuration
16) Edit environment settings
h) Help for this menu
q) Return to previous menu

```

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`.

- 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

URL Identifier: SCM_SERVLET_INT

*Description: Servlet used by internal users

*URLID: http://

Comments: Internal link to Supply Chain database
 Example: http://<machine name>/psp/<website name>/EMPLOYEE/ERP
 EMPLOYEE is the portal registry

URL Properties

Save Return to Search Previous in List Next in List Notify Add Update/Display

URL Maintenance page for SCM_SERVLET_INT

- 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:

- Select PeopleTools, Utilities, Administration, URLs to access the PeopleTools URL Maintenance page.
- 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

URL Identifier: SUP_SERVLET

*Description: Supplier portal servlet

*URLID: http://webserver/psp/supportal/

Comments: Link to Supplier Portal
Example: http://localserver/psp/supplierportaldomain/

URL Properties

Save Return to Search Notify Add Update/Display

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

URL Identifier: EMP_SERVLET

*Description: Employee portal servlet

*URLID: http://webserver/pspp/empportal

Comments: Example: http://servername/pspp/employeeportaldomain/

URL Properties

Save Return to Search Notify Add Update/Display

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:

The screenshot displays the 'URL Maintenance' interface for the identifier 'SUP_OB_INVITE'. The form includes the following fields:

- URL Identifier:** SUP_OB_INVITE
- *Description:** Onboarding Invitations
- *URLID:** http://
- Comments:** (Empty text area)

Below the form, the section 'URL Properties' is visible. At the bottom of the page, there are five buttons: 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

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*.

- 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:

The screenshot shows the 'URL Maintenance' page for the identifier 'EB_SERVLET'. The form contains the following information:

- URL Identifier:** EB_SERVLET
- *Description:** Email Notification
- *URLID:** http://<machine-name>/psp/<web-server-domain-name>/CUSTOMER/ERP/c/ROLE_C
- Comments:** Link to eBill Payment bill search used by the Billing Email Notification process.

Below the form, there is a section labeled 'URL Properties' and a toolbar with the following buttons: Save, Return to Search, Notify, Add, and Update/Display.

URL Maintenance page for EB_SERVLET

- 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 home page.

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 home page, you must grant the home page personalization security access to all non-guest users. To update the home page 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 home page 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 home page.

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
- Installing OSNConnector for PeopleSoft eProcurement

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 SFTP 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:

The screenshot shows the 'Permission Lists' page for 'EPPV1000' with the 'Component Interfaces' tab selected. The page title is 'Permission List EPPV1000' and the description is 'ePro Requisitions'. A table lists several component interfaces, with 'PV_PROCURE_REQ_V3_CI' highlighted and its 'Edit' button selected. The table has columns for 'Name' and 'Edit'. Below the table are buttons for 'Save', 'Return to Search', 'Add', and 'Update/Display'. A breadcrumb trail at the bottom reads: 'General | Pages | PeopleTools | Process | Sign-on Times | Component Interfaces | Web Libraries | Web Services | Personalizations |'.

Name	Edit		
PV_PROCURE_REQ_V2_CI	Edit	+	-
PV_PROCURE_REQ_V3_CI	Edit	+	-
PV_REQ_CANCEL	Edit	+	-
PV_WF_REQ_APPR_CI	Edit	+	-
USER_PROFILE	Edit	+	-
WORKLISTENTRY	Edit	+	-

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:

The screenshot shows the 'Component Interface Permissions' window for 'PV_PROCURE_REQ_V3_CI'. The window title is 'Component Interface Permissions' and it has a 'Help' button in the top right. Below the title bar, there is a 'Personalize | Find | [Print Icon] | [Grid Icon]' menu and navigation buttons for 'First', '1-16 of 16', and 'Last'. The main content is a table with two columns: 'Method' and '*Method Access'. All methods listed have 'Full Access' selected in the dropdown menu. To the right of the table are two buttons: 'Full Access (All)' and 'No Access (All)'. At the bottom of the window are 'OK' and 'Cancel' buttons.

Method	*Method Access
AddItem	Full Access
Cancel	Full Access
ChangeShipTo	Full Access
Create	Full Access
Find	Full Access
Get	Full Access
GetAuthorizedCatalogs	Full Access
GetDirectConnectList	Full Access
GetRestrictInventoryRoleView	Full Access
GetSubstituteItemRoleView	Full Access
GetViewAllVendorsRoleView	Full Access
Save	Full Access
SaveRequisition	Full Access
SaveRequisitionforLater	Full Access
GetAllComments	Full Access
DeleteBufferRow	Full Access

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:

The screenshot shows the 'Web Libraries' tab in a PeopleSoft application. At the top, there are navigation tabs: 'Component Interfaces', 'Web Libraries' (selected), 'Web Services', 'Personalizations', and 'Query'. Below the tabs, the following information is displayed:

- Permission: EPPV1000
- List
- Description: ePro Requisitions

The main content area displays a table titled 'Web Libraries' with the following columns: 'Web Library Name' and 'Edit'. The table contains 8 rows of records, each with an 'Edit' link and '+' and '-' icons. The 'WEBLIB_PV' record is highlighted. Below the table, there are buttons for 'Save', 'Return to Search', 'Add', and 'Update/Display'. At the bottom, a breadcrumb trail reads: 'General | Pages | PeopleTools | Process | Sign-on Times | Component Interfaces | Web Libraries | Web Services | Personalization'.

Web Library Name	Edit		
WEBLIB_ART	Edit	+	-
WEBLIB_EOAW	Edit	+	-
WEBLIB_PTAF	Edit	+	-
WEBLIB_PV	Edit	+	-
WEBLIB_PVMOBILE	Edit	+	-
WEBLIB_PV_DC	Edit	+	-
WEBLIB_PV_EMAIL	Edit	+	-
WEBLIB_PV_WML	Edit	+	-

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.

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

Function	*Access Permissions	View Content References for this Script
ISCRIP1.FieldFormula.IScript_PVShopCart_Template	Full Access	View
ISCRIP1.FieldFormula.IScript_WFDesignerDeleteRow	Full Access	View
ISCRIP1.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_ViewItrImageFullSize	Full Access	View
PV_ITM_IMAGE_VIEW.FieldFormula.IScript_ViewItrImageFullSize2	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_ISCRIP1_LIB.FieldFormula.IScript_AjaxText
- PV_ISCRIP1_LIB.FieldFormula.IScript_ChangeRequestInfo

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

Grant Full Access to the following:

- PV_ISCRIP1_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:

General | **Permission Lists** | Members | Dynamic Members | Workflow | Role Grant | Links | Role Queries | Audit

Role Name: ePro Requester
Description: eProcurement Requester

Permission Lists Personalize | Find | View All | First 1 of 1 Last

*Permission List	Description	View Definition
EPPV1000	ePro Requisitions	View Definition + -

Save Return to Search Previous in List Next in List Add Update/Display

General | Permission Lists | Members | Dynamic Members | Workflow | Role Grant | Links | Role Queries | Audit

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:

The screenshot displays the 'Roles' tab for a user profile. At the top, navigation tabs include 'General', 'ID', 'Roles', 'Workflow', 'Audit', 'Links', and 'User ID Queries'. The user information shown is 'User ID VP1' and 'Description Kenneth Schumacher'. Below this, there are two main sections: 'Dynamic Role Rule' and 'User Roles'.

The 'Dynamic Role Rule' section contains a search box, 'Test Rule(s)', 'Refresh', 'Execute Rule(s)', 'Process Monitor', and 'Service Monitor' buttons.

The 'User Roles' section is a table with the following columns: 'Role Name', 'Description', 'Dynamic', and 'View Definition'. The table lists the following roles:

Role Name	Description	Dynamic	View Definition
UPG_ALLPNLS		<input type="checkbox"/>	Route Control View Definition
UPG_APPSRVR	Can start application server	<input type="checkbox"/>	Route Control View Definition
VICE PRESIDENT	Vice President	<input type="checkbox"/>	Route Control View Definition
VMI Manager	VMI Manager	<input type="checkbox"/>	Route Control View Definition
XMLP Power User	BIP Power User	<input type="checkbox"/>	Route Control View Definition
XMLP Report Developer	BIP Report Developer	<input type="checkbox"/>	Route Control View Definition
ePro Admin	ePro Administrator	<input type="checkbox"/>	Route Control View Definition
ePro Buyer	ePro Buyer	<input type="checkbox"/>	Route Control View Definition
ePro Requester	eProcurement Requester	<input type="checkbox"/>	Route Control View Definition

At the bottom of the page, there are 'Save' and 'Return to Search' buttons on the left, and 'Add' and 'Update/Display' buttons on the right. The breadcrumb trail at the bottom reads: 'General | ID | Roles | Workflow | Audit | Links | User ID Queries'.

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.

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

General **Pages** PeopleTools Process Sign-on Times Component Interfaces

Permission List **EPPV1000**
 Description ePro Requisitions

[Mobile Page Permissions](#)

Menus			Personalize	Find	View All	First	1-10 of 10	Last
Menu Name	Menu Label	Edit Components						
EOAW_APPROVAL_WORKFLOW	Eoaw Approval Workflow	Edit Components						+ -
EOEN_MAIN_MENU	Eoen Main Menu	Edit Components						+ -
MANAGE_COMMITMENT_CONTROL	Manage Commitment Control	Edit Components						+ -
MANAGE_PURCHASE_ORDERS	Manage Purchase Orders	Edit Components						+ -
PTAF_APPROVAL_WORKFLOW	Sac Approval Workflow	Edit Components						+ -
PV_MAINPAGE_MENU	eProcurement Home	Edit Components						+ -
PV_MAIN_MENU	Main Menu	Edit Components						+ -
PV_MOB_MENU	eProcurement Mobile Menu	Edit Components						+ -
PV_WORKLIST	Worklist	Edit Components						+ -
WORKFLOW_ADMINISTRATOR	Workflow Administrator	Edit Components						+ -

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

eProcurement Mobile Menu

Components Personalize | Find | 1-5 of 5 | First Last

Authorized?	Component Name	Item Label	Edit Pages	View Content References for this Component
<input checked="" type="checkbox"/>	PV_MOB_855_CMP	Mobile Requisition 855	Edit Pages	View
<input checked="" type="checkbox"/>	PV_MOB_855_MNG	My Requisitions	Edit Pages	View
<input type="checkbox"/>	PV_MOB_CMP	Mobile Requisitions	Edit Pages	View
<input checked="" type="checkbox"/>	PV_MOB_PREF_FL	My Preferences	Edit Pages	View
<input checked="" type="checkbox"/>	PV_RECV_PO_FL	ePro Receiving	Edit Pages	View

OK Cancel

Select All

Deselect All

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 Permissions ✕

PV_MOB_MENU / Use / Mobile Requisition 855

Pages	Authorized?	Display Only	Actions
Side 1 page - Requisitions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Add
Search Select	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Update/Display
Cart	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Update/Display All
Search Results	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Correction
Item Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Web Suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Select All
Checkout	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Deselect All
Search Results	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Pv Mob 855 Puchout	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Save Confirmation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Search Footer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Approvals	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Requisition	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Browse Catalogs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Recently Ordered Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Special Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

OK Cancel

Page Permission: Authorized

7. Click OK.

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

Page Permissions ✕

PV_MOB_MENU / Use / My Requisitions

Panel Item Name	Authorized?	Display Only
My Requisitions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pv Myord Schd Scf2	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Actions

Add

Update/Display

Update/Display All

Correction

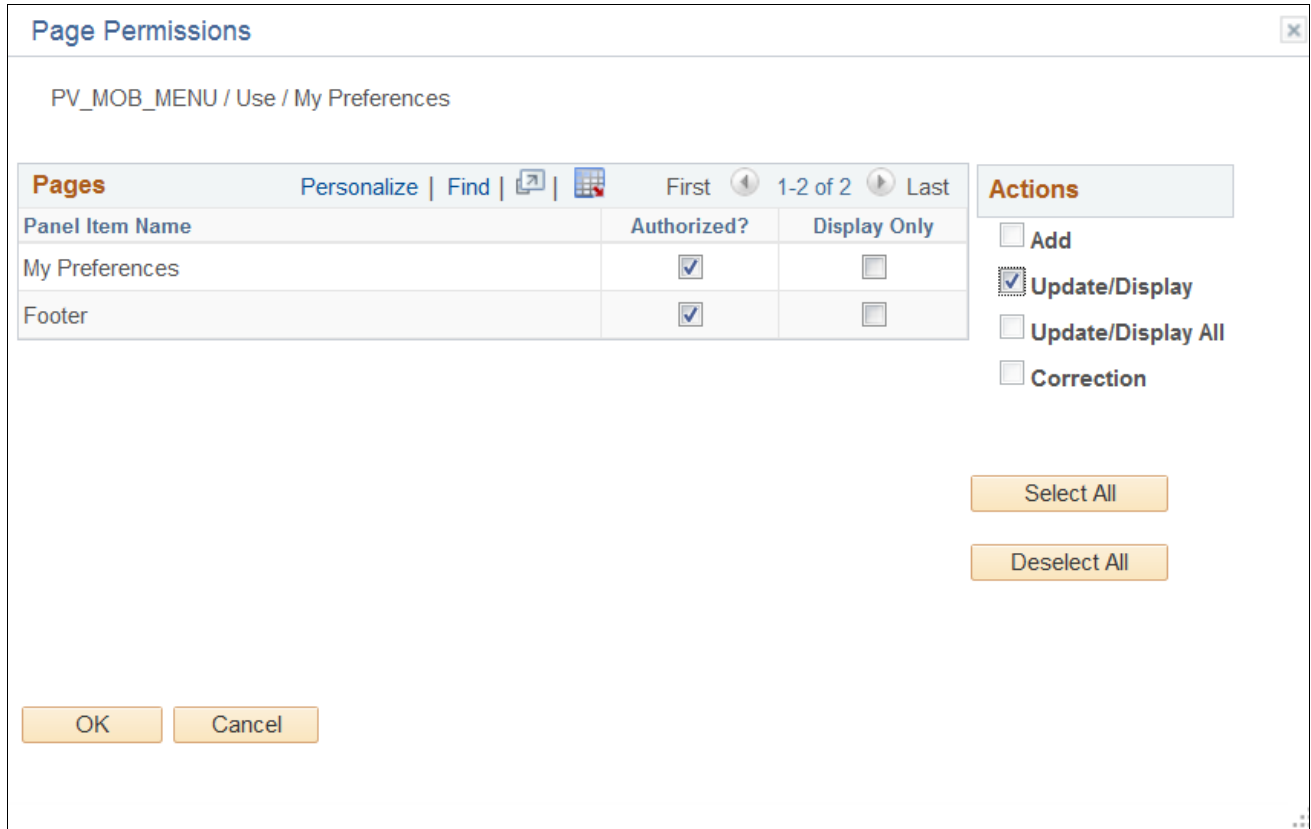
Select All

Deselect All

OK
Cancel

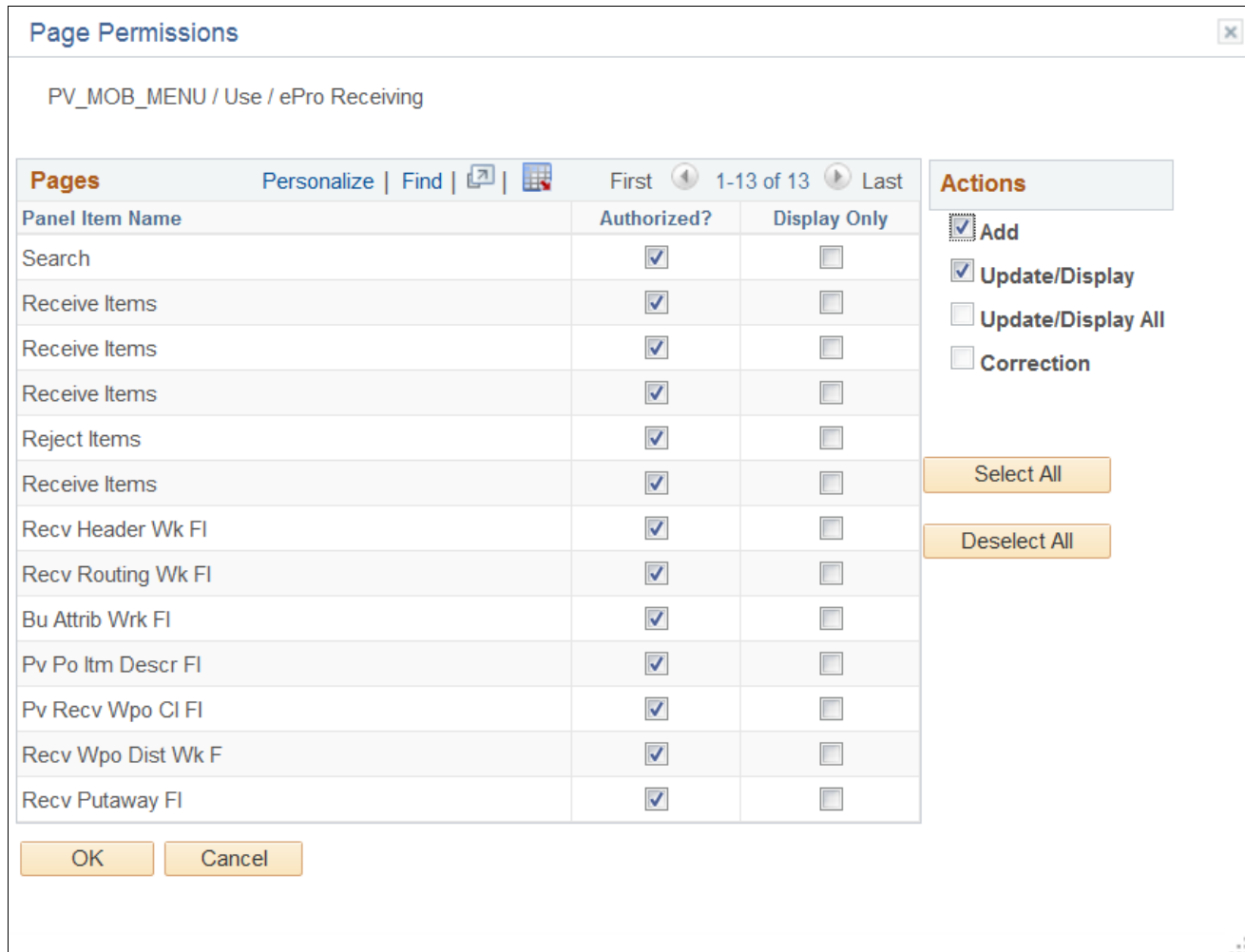
Page Permissions: Component Name PV_MOB_855_MNG

- 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.

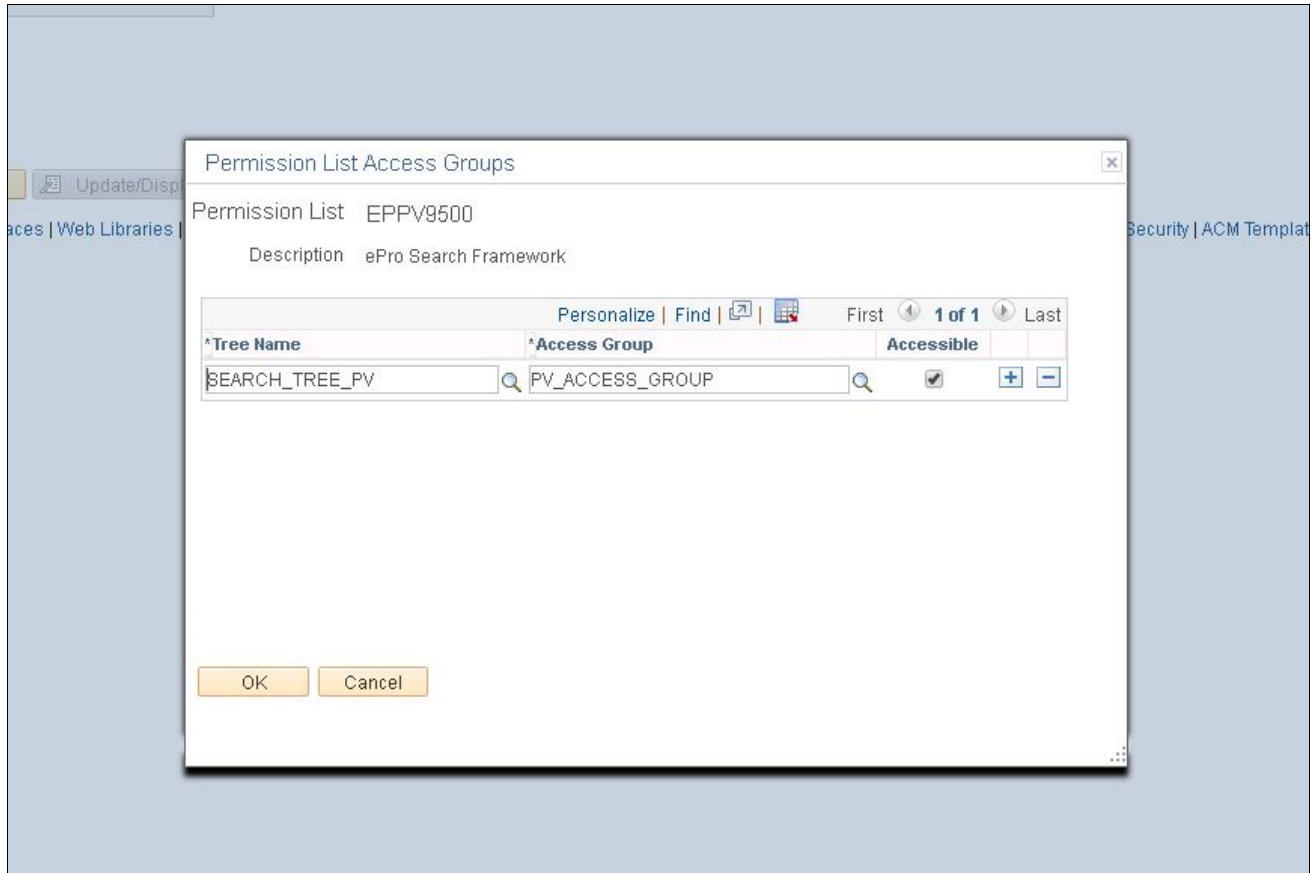
Before indexing the search definitions, verify that the user has been assigned to the Permission List EPPV9500.

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 PeopleSoft's Search Framework indexing.

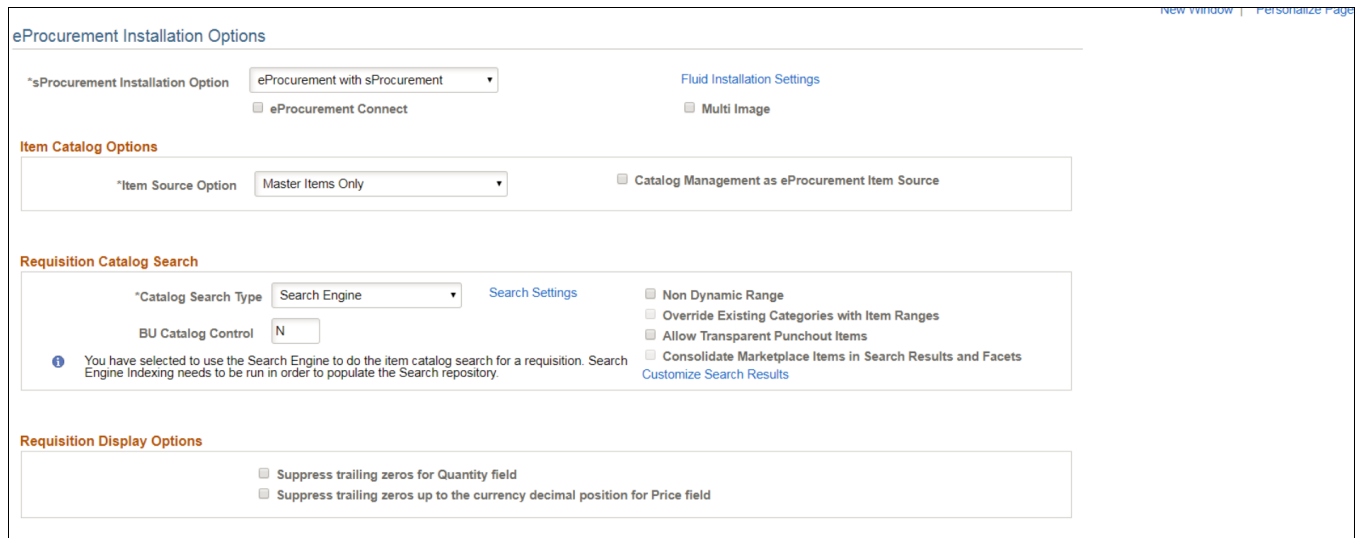
To index the eProcurement search definitions:

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.

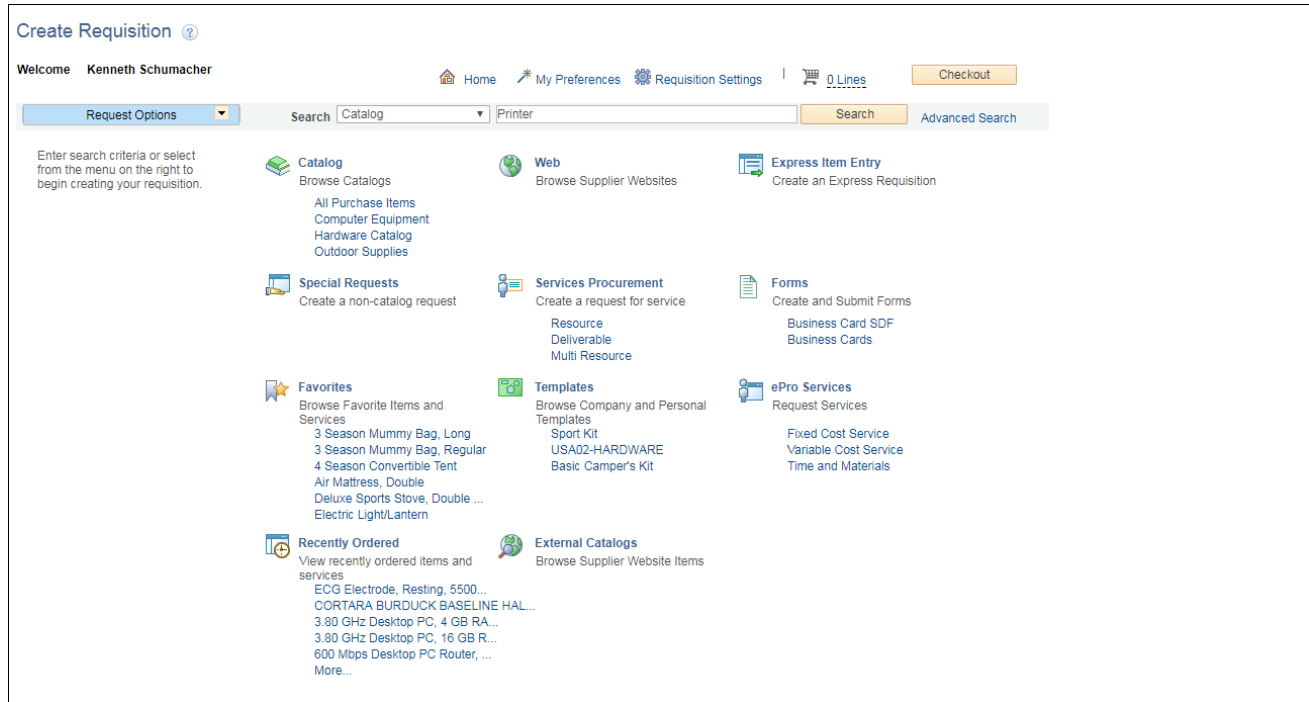


eProcurement Installation Options page

To verify that the search engine is working:

1. Select eProcurement, Requisition.

- 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

- 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 :

- Select PeopleTools , Security, Permissions & Roles, Permission Lists.
- Search for and select the Permission List EPPV1000.
- Select the Search Groups tab.

- 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.

- 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.

Task 20-3: Installing OSNConnector for PeopleSoft eProcurement

This section discusses:

- Prerequisites
- Setting Up WebLogic Server
- Configure the Integration Gateway Properties
- Configure the WebLogic Environment
- Configuring the OSN Listening Connector Servlet
- Setting Up the Gateway for Integration Broker
- Troubleshooting OSNConnector Installation

Task 20-3-1: Prerequisites

OSNConnector is used to integrate PeopleSoft eProcurement with Oracle Supplier Network (OSN). It works with WebLogic 12 and PeopleTools version 8.58.xx.

OSNConnector installation must take place after you install PeopleSoft PeopleTools 8.58.

Task 20-3-2: Setting Up WebLogic Server

To install OSNConnector on Windows or Linux system, first you have to set up WebLogic Server.

To set up WebLogic Server:

1. Edit the PIA response file `resp_file.txt`, which is located at:.

- For Windows: `%PS_HOME%\SETUP\PsmPPIAInstall`
- For Linux: `$PS_HOME/setup/PsmPPIAInstall`

2. Set the Existing Domain and Installing Extensions options in the response file as follows:

```
# Install action to specify the core task that installer should perform.
# For creating new PIA domain - CREATE_NEW_DOMAIN.
# For redeploying PIA - REDEPLOY_PSAPP.
# For recreating PIA domain - REBUILD_DOMAIN.
# For installing additional PSFT site - ADD_SITE
# For installing Extensions - ADD_PSAPP_EXT
INSTALL_ACTION=ADD_PSAPP_EXT
```

```
# Domain type to specify whether to create new domain or modify⇒
existing domain. Possible values are "NEW_DOMAIN", "EXISTING_DOMAIN".
DOMAIN_TYPE=EXISTING_DOMAIN
```

```
#For Deploying additional App packages give the path of App Home and⇒
name of the packages.
```

```
PS_APP_HOME=<PS_APP_HOME>
```

```
#APP Package to deploy: to deply uncomment the the line
```

```
APP_PKG=FIN/SCM PeopleSoft eProcurement
```

3. Execute PIA setup file based on your environment.

For Windows, locate the `setup.bat` file from `%PS_HOME%\SETUP\PsmPPIAInstall\`, and execute this:

```
<PS_HOME>\setup\PsmPPIAInstall>setup.bat -i silent -DRES_FILE_PATH=<PS_⇒
HOME>\setup\PsmPPIAInstall\resp_file.txt
```

For Linux, locate the `setup.sh` file from `$PS_HOME/setup/PsmPPIAInstall/`, and execute this:

```
<PS_HOME>/setup/PsmPPIAInstall>setup.sh -i silent -DRES_FILE_PATH=<PS_⇒
HOME>/setup/PsmPPIAInstall/resp_file.txt
```

4. Verify the PIA Install log files located in the PIA_WEB Server folder.

This is a sample log file:

```
BUILD SUCCESSFUL
```

```
Total time: 1 minute 6 seconds
```

```
Initializing WebLogic Scripting Tool (WLST) ...
```

```
Jython scans all the jar files it can find at first startup. Depending⇒
on the system, this process may take a few minutes to complete, and⇒
WLST may not return a prompt right away.
```

```
Welcome to WebLogic Server Administration Scripting Shell
```

```
Type help() for help on available commands
```

```
Created Single Server
```

```
Encrypting OPERATOR user...
```

```
Encrypting done.
PIA_INSTALL_SUCCESS
```

- Once the process completes, verify that the following files are delivered in the given path:

In Windows system:

- %PS_CFG_HOME%\webserv\PSDomain name\application\peoplesoft\PSIGW.war\WEB-INF\classes\com\peoplesoft\pt\integrationgateway\listeningconnector\fscm_epo_OSNListeningConnector.class
- %PS_CFG_HOME%\webserv\PSDomain name\application\peoplesoft\PSIGW.war\WEB-INF\classes\com\peoplesoft\pt\integrationgateway\targetconnector\fscm_epo_OSNTargetConnector.class
- %PS_CFG_HOME%\webserv\PSDomain name\application\peoplesoft\PSIGW.war\WEB-INF\classes\com\peoplesoft\fscm\epo\servlet\Support\fscm_epo_EproRequestException.class
- %PS_CFG_HOME%\webserv\PSDomain name\application\peoplesoft\PSIGW.war\WEB-INF\classes\com\peoplesoft\fscm\epo\servlet\Support\fscm_epo_ExtendXml.class
- %PS_CFG_HOME%\webserv\PSDomain name\application\peoplesoft\PSIGW.war\WEB-INF\classes\com\peoplesoft\fscm\epo\servlet\Support\fscm_epo_EproOsnAttacher.class
- %PS_CFG_HOME%\webserv\PSDomain name\application\peoplesoft\PSIGW.war\WEB-INF\classes\com\peoplesoft\fscm\epo\servlet\Support\fscm_epo_FTPClient.class

In Linux system:

- \$PS_CFG_HOME/webserv/PSDomain name/application/peoplesoft/PSIGW.war/WEB-INF/classes/com/peoplesoft/pt/integrationgateway/listeningconnector/fscm_epo_OSNListeningConnector.class
- \$PS_CFG_HOME/webserv/PSDomain name/application/peoplesoft/PSIGW.war/WEB-INF/classes/com/peoplesoft/pt/integrationgateway/targetconnector/fscm_epo_OSNTargetConnector.class
- \$PS_CFG_HOME/webserv/PSDomain name/application/peoplesoft/PSIGW.war/WEB-INF/classes/com/peoplesoft/fscm/epo/servlet/Support/fscm_epo_EproRequestException.class
- \$PS_CFG_HOME/webserv/PSDomain name/application/peoplesoft/PSIGW.war/WEB-INF/classes/com/peoplesoft/fscm/epo/servlet/Support/fscm_epo_ExtendXml.class
- \$PS_CFG_HOME/webserv/PSDomain name/application/peoplesoft/PSIGW.war/WEB-INF/classes/com/peoplesoft/fscm/epo/servlet/Support/fscm_epo_EproOsnAttacher.class
- \$PS_CFG_HOME/webserv/PSDomain name/application/peoplesoft/PSIGW.war/WEB-INF/classes/com/peoplesoft/fscm/epo/servlet/Support/fscm_epo_FTPClient.class

Task 20-3-3: Configure the Integration Gateway Properties

Next, you need to configure the Integration Gateway properties.

To configure the Integration Gateway properties:

- Open the integrationGateway.properties file to edit.

In Windows, its placed at %PS_HOME%\webserv\PSDomain name\application\peoplesoft\PSIGW.war\WEB-INF

In Linux, its placed at \$PS_HOME/webserv/PSDomain name/application/peoplesoft/PSIGW.war/WEB-INF/

- In the file, search for ig.log.level property and set the level to 4 so as to control the logging level.
- Configure the different ig.isc.<parameters> properties as shown:

```
ig.isc.serverURL=//<machine name>:<jolt port>
```

```
ig.isc.userid=<database user id>
ig.isc.password=<database password>
ig.isc.toolsRel=<peopletools release version>

ig.isc.$NODENAME.serverURL=//<machine name>:<jolt port>
ig.isc.$NODENAME.userid=<database user id>
ig.isc.$NODENAME.password=<database password>
ig.isc.$NODENAME.toolsRel=<peopletools release version>
```

Substitute \$NODENAME for your local node. For example:

```
ig.isc.PSFT_EP.serverURL=//hostbox.peoplesoft.com:9000
```

Note that the encryption utility is required for the password.

This is an example:

```
ig.isc.serverURL=//vramirez-ca:9000
ig.isc.userid=AB1
ig.isc.password={V1.1}Wsh6z0LM+4E=
ig.isc.toolsRel=8.58

ig.isc.PSFT_EP.serverURL=//vramirez-ca:9000
ig.isc.PSFT_EP.userid=AB1
ig.isc.PSFT_EP.password={V1.1}Wsh6z0LM+4E=
ig.isc.PSFT_EP.toolsRel=8.58
```

Note. Forward slash (/) must be used instead of back slash (\).

4. You can set the following OSN attributes only if their functionality is required:

- Target Connector properties: `ig.osn.attachmentDir` – Directory to hold attachments for OSN.

In Windows, set `ig.osn.attachmentDir = %PS_CFG_HOME%/webserv/PSDomain name/applications/peoplesoft\PSIGW.war/ WEB-INF/classes/com/peoplesoft/fscm/epo/servlet/Support/attachments`

In Linux, set `ig.osn.attachmentDir = $PS_CFG_HOME/webserv/PSDomain name/applications/peoplesoft/PSIGW.war/ WEB-INF/classes/com/peoplesoft/fscm/epo/servlet/Support/attachments`

- Listening Connector properties: `ig.osn.inboundTransactions`– This contains the list of valid inbound documents with their associated node and message. The format to use is:

```
<DocumentType1>:<Node1>:<Message1>:<MsgVersion1>/<DocumentType2>:<Node2>:<Message2>:<MsgVersion2>/
```

This is an example:

```
ig.osn.inboundTransactions=SHOW_SHIPMENT_005:PSFT_ORACLE_SUPPLIER =>
NETWORK:ADVANCED_SHIPPING_RECEIPT:VERSION_2/ACKNOWLEDGE_PO_008:PSFT =>
ORACLE_SUPPLIER_NETWORK:PURCHASE_ORDER_ACKNOWLEDGEMENT/PROCESS =>
INVOICE_002:PSFT_ORACLE_SUPPLIER_NETWORK:EM_VOUCHER_IN
```

Note. The `<MsgVersionN>` can be left blank if the `<MessageN>` has only one version.

Task 20-3-4: Configure the WebLogic Environment

Next, you need to configure the WebLogic environment on your Windows or Linux system.

To configure:

1. Verify that the web server has been stopped.
2. Add the OSN files to the classpath as given:
 - For Windows:


```
%PS_HOME%\webserv\PSDomain name\bin\setEnv.cmd.
```
 - For Linux:


```
$PS_HOME/webserv/PSDomain name/bin/setEnv.sh
```
3. In the `:setEnv` section of the `setEnv.cmd` and `setEnv.sh` file, add the following lines. Ensure that the long lines are all on one line with no 'returns.'

- In `setEnv.cmd`

```
SET OSN_DIR=%PS_CFG_HOME%\webserv\%DOMAIN_NAME%\applications=>
\peoplesoft\PSIGW.war\WEB-INF
SET OSN_CP=%OSN_DIR%\classes\com\peoplesoft\fscm\epo\servlet\Support
```

Then beneath this command, add the value `%OSN_CP%` into the `CLASSPATH`. The last SET line should look similar to:

```
SET CLASSPATH=%OSN_CP%;%PSCCLASSPATH%;%JAVA_HOME%\lib\tools.jar;%WL_>
HOME%\lib\weblogic_sp.jar;%WL_HOME%\lib\weblogic.jar;%CLASSPATH%
```

Note. The entire syntax should be in one line.

- In `setEnv.sh`

```
export OSN_DIR=$PS_CFG_HOME/webserv/$DOMAIN_NAME/applications=>
/peoplesoft/PSIGW.war/WEB-INF
export OSN_CP=$OSN_DIR/classes/com/peoplesoft/fscm/epo/servlet/Support
```

Then beneath this command, add the value `$OSN_CP` into the `CLASSPATH`. The last line should look similar to:

```
CLASSPATH=.:${PSCCLASSPATH}:${OSN_CP}:${PATCH_CLASSPATH}:${JAVA_HOME}>
/lib/tools.jar:${WL_HOME}/server/lib/weblogic_sp.jar:${WL_HOME}>
/server/lib/weblogic-classes.jar:${WL_HOME}/server/lib/weblogic.jar:
```

Note. The entire syntax should be in one line.

Task 20-3-5: Configuring the OSN Listening Connector Servlet

To receive Purchase Order responses from the Oracle Supplier Network (OSN), a servlet is used for the listening connector.

To set up the servlet:

1. Open the web.xml file to edit that is placed in %PS_HOME%\websrv\PSDomain name\application\peoplesoft\PSIGW\WEB-INF.
2. Within the <web-app> tag, you will find a set of <servlet> tags. Add the following <servlet> tag below the set of <servlet> tags:

```
<servlet>
    <servlet-name>fscm_epo_OSNListeningConnector</servlet-name>
    <servlet-class>com.peoplesoft.pt.integrationgateway.listeningconnector.fscm_epo_OSNListeningConnector</servlet-class>
</servlet>
```

3. Within the <web-app> tag, you will find a set of <servlet-mapping> tags. Add the following <servlet-mapping> tag below the set of <servlet-mapping> tags:

```
<servlet-mapping>
    <servlet-name>fscm_epo_OSNListeningConnector</servlet-name>
    <url-pattern>/fscm_epo_OSNListeningConnector/*</url-pattern>
</servlet-mapping>
```

4. Start the Web Server, App Server, and Process Scheduler.

Note. In a Windows system, when you start web server with startPIA.cmd it calls the setEnv.cmd file and in a Linux system startPIA.sh calls the setEnv.sh file.

Note. Don't start WebLogic as a service as the classpath updates from the setEnv.cmd file won't get loaded.

5. To test the listening connector, you can enter the following URL into a web browser:

http://<host>:<port>/PSIGW/fscm_epo_OSNListeningConnector

OSN uses this URL to send inbound documents to POA, Invoices, ASNs, and so on.

Task 20-3-6: Setting Up the Gateway for Integration Broker

To set up the Integration Broker gateway:

1. Navigate to PeopleTools, Integration Broker, Configuration, Gateways.
2. Search for the gateway ID. If no additional ones have been configured, search and open the gateway LOCAL.
3. In the URL field, enter: *http://<host>:<port>/PSIGW/PeopleSoftListeningConnector*
4. Save, and then click Load Gateway Connectors.
5. Navigate to People Tools, Integration Broker, Integration Setup, Nodes, and activate the node PSFT_ORACLE_SUPPLIER_NETWORK.

Also, activate the following routings within the node:

- ORACLE_ADVANCED_SHIPPING_R
- ORACLE_VOUCHER_IN
- ORACLE_ACKNOWLEDGEM
- ORACLE_ORDER_SN

6. Navigate to PeopleTools, Integration Broker, Integration Setup, Service Operations.

7. Activate the following services, and handlers within the services:

Service	Handler
ADVANCED_SHIPPING_RECEIPT	AdvancedShippingReceipt
EM_VOUCHER_IN	EmVoucherIn
PURCHASE_ORDER_ACKNOWLEDGEMENT	PurchaseOderAcknowledgement
PV_ORDER	<No handler>

8. Navigate to People Tools, Integration Broker, Integration Setup, Queues, and ensure that the following queues's status is set to *Run*:

- ADVANCED_SHIPPING_NOTICE
- EM_VOUCHER_IN
- PURCHASE_ORDER
- PV_MS_ORD_DISPATCH

Task 20-3-7: Troubleshooting OSNConnector Installation

If you encounter any issue in OSNConnector installation, try the following:

- Check the log files in the %PSHOME%\webserv\PSDomain name\application\peoplesoft\PSIGW.war directory.

You may find the files msgLog.html and errorLog.html in this directory. Check these files first for errors. If these log files don't exist, verify if the logging level in the intergrationGateway.properties file is set to 4.

- Check for errors in the Integration Broker monitor in PIA. To check:
 1. Navigate to PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services.
 2. Verify that the services, messages, and node are active.

Chapter 21

Configuring Kibana for Accounts Payable

This chapter discusses:

- Understanding Kibana
- Prerequisites
- Verifying the Search Definition Deployment
- Deploying Kibana for Accounts Payable
- Reviewing Accounts Payable Dashboards

Understanding Kibana

Kibana is a web application and works with Elasticsearch. Kibana provides visual reports (visualization) in the form of charts, tables, and so on, based on queries that you set up on Elasticsearch indexes.

A visualization is first created in Kibana and attached to a dashboard. A dashboard can contain multiple visualizations. Typically, an application developer creates the visualizations and dashboards. The visualizations and dashboards are objects in Kibana, which should be imported into PeopleSoft.

Typically, a PeopleSoft user with the Search Administrator role performs the task of importing the dashboards, configuring the dashboards as tiles or related information, specifying user privileges for a dashboard, and then deploying the dashboards, which end users can use to view the analytic data of an application based on the user's privileges.

See the product documentation for PeopleTools: Search Technology for more information on setting up Kibana in PeopleSoft Search Framework.

Prerequisites

From PeopleTools 8.58, Search Framework enables you to create visualizations in Kibana based on PeopleSoft application data indexes in Elasticsearch.

In order to create visualization and use them, ensure that the following are completed:

- PeopleTools 8.58 is installed.
- Elasticsearch 7.0 is installed and running.
The application search definitions are deployed and indexes are built.
- Kibana 7.0 is installed and running.
On the Search Instance Properties page, enter the Kibana server details.

Task 21-1: Verifying the Search Definition Deployment

This step ensures that Elasticsearch is up and running, and the delivered voucher index is deployed and working correctly.

To verify:

1. Test if Elasticsearch is active.

To test:

- a. Select PeopleTools, Search Framework, Administration, Search Instance, and search for PTSF_DEFAULT.
 - b. Select Ping to ensure Elasticsearch is active.
2. Next, ensure that the voucher search definition is deployed by following these steps:
 - a. Select PeopleTools, Search Framework, Administration, Deploy/Delete Object.
 - b. On the Deploy Search Definition page, under the Deploy Status column, verify that the EP_AP_VOUCHERS search definition is deployed. This search definition must be deployed for Kibana to work properly.
 - c. Verify if the crawl is successful.

The crawl successful status appears with the date and time, as shown in the following example:

Definition	Description	Deploy Status	Crawl Status	Run Date/Time	User/Run Control ID	Index Settings
1 AP_SDN_ADDRESS	Financial Sanctions Addresses	Undeployed	Not Crawled			Index Settings
2 AP_SDN_AKA_NAME	Financial Sanctions Names	Undeployed	Not Crawled			Index Settings
3 EOFD_FLUID_DISCUSSIONS	Fluid Discussions	Undeployed	Not Crawled			Index Settings
4 EP_AM_ASSET	Assets	Undeployed	Not Crawled			Index Settings
5 EP_AP_PAYMENTS	Payment	Undeployed	Not Crawled			Index Settings
6 EP_AP_VENDOR	Suppliers	Undeployed	Not Crawled			Index Settings
7 EP_AP_VENDOR_CONVER	Supplier Conversation	Undeployed	Not Crawled			Index Settings
8 EP_AP_VOUCHERS	Vouchers	Deployed	Successful	07/07/2020 8:52:47AM	VP1 / EP_AP_VOUCHERS_FULL	Index Settings
9 EP_AR_ITEMS	Item Search	Undeployed	Not Crawled			Index Settings
10 EP_AR_PAYMENTS	AR Payment Search	Undeployed	Not Crawled			Index Settings

Crawl Status

Note. If the crawled status shows 'successful,' and displays date and time, then you can skip the next step that is executed to schedule search index for search definition EP_AP_VOUCHERS.

3. Schedule search index for search definition EP_AP_VOUCHERS by following these steps:
 - a. Select PeopleTools, Search Framework, Administration, Schedule Search Index.
 - b. Select Add a New Value tab.

- c. Enter `EP_AP_VOUCHER_FULL` as the run control ID.

Note. If `EP_AP_VOUCHER_FULL` is already available, select from the search results.

- d. On the Build Search Index page, search for `EP_AP_VOUCHERS` search definition and select the Full Index option.
- e. Click Run available on the top right of the page.

Note. Do not supply any information in the Date Range group box because this feature is not compatible with the voucher index.

4. Next, test if the index is populated by following these steps:
 - a. Select PeopleTools, Search Framework, Utilities, Search Test Page.
 - b. On the Search page, search for `EP_AP_VOUCHERS`.

If the search result shows one or more rows, then it means the vouchers are successfully indexed, as shown in the following example:

The screenshot displays a search results interface with the following details:

- Search Results Page:** Shows search statistics: Elapsed Time 0.07500000, Documents 1 through 10 of 1701.
- Search Results:** A list of results with navigation controls (1 of 10).
- Result 1:**
 - Title: [Voucher - AUS01 | APA01](#)
 - Uri: http://slc08cov.us.oracle.com:8000/psc/e92tgb2x_newwin/EMPLOYEE/E92TGKB2/c/ENTER_VOUCHER_INFORMATION.VCHR_EXPRESS.GBL?Page=VCHR_SUMMARY_PG&Action=U&BUSINESS_UNIT=AUS01&VOUCHER_ID=APA01
 - Signature: 10016
 - Content Length: [blank]
 - Language Code: English
 - Score: 1.0
 - Time Stamp: 04/24/12 4:59:16PM
 - Summary: Supplier: Limit Computers | Date: 2000-06-07 | Style: Regular Voucher | Amount: 9185 AUD | Entered By: SAMPLE | Invoice ID: APA01 | Entry Status: Postable | Source: Online
 - Categories:
 - 1 EP_AP_VOUCHERS_E92TGKB2
- Result 2:**
 - Title: [Voucher - AUS01 | APA02](#)
 - Uri: http://slc08cov.us.oracle.com:8000/psc/e92tgb2x_newwin/EMPLOYEE/E92TGKB2/c/ENTER_VOUCHER_INFORMATION.VCHR_EXPRESS.GBL?Page=VCHR_SUMMARY_PG&Action=U&BUSINESS_UNIT=AUS01&VOUCHER_ID=APA02

Vouchers Successfully Indexed

5. Next, find the correct URL information to ping Kibana by following these steps:
 - a. Select PeopleTools, Search Framework, Administration, Search Instance.

- b. On the Kibana group box, find the host name and port number, as shown in the following example:

Kibana

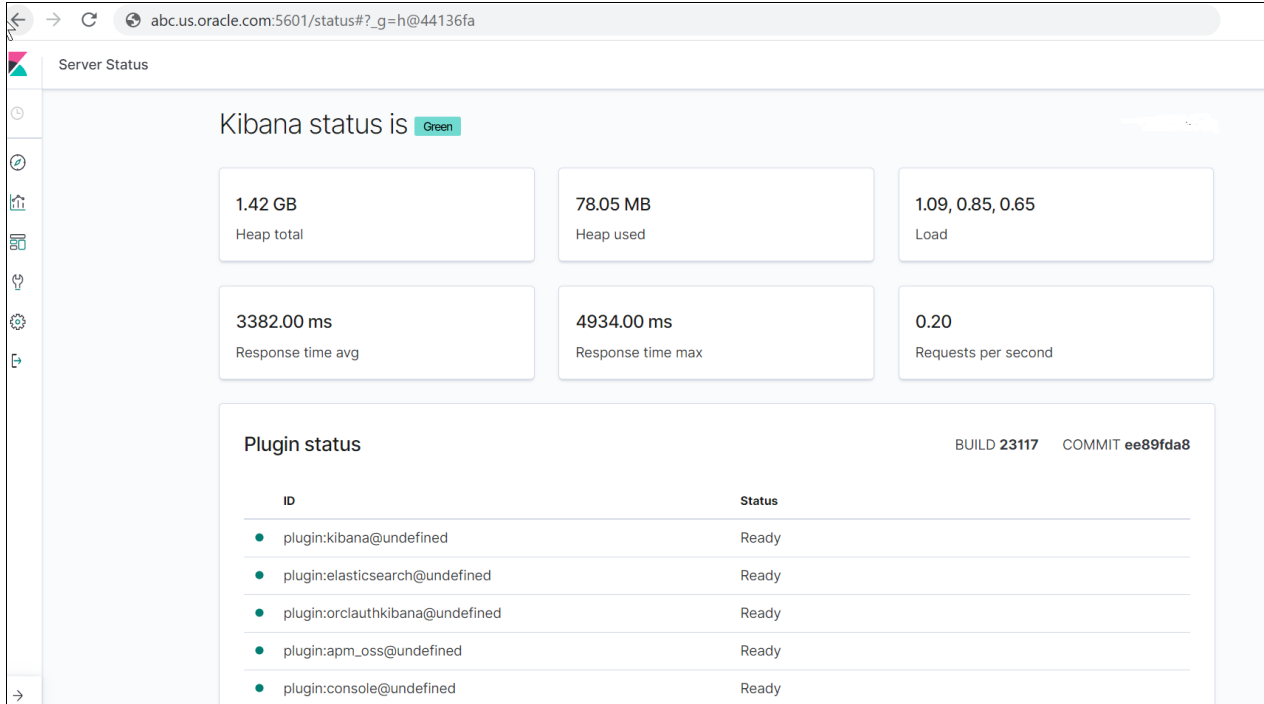
Host Name	<input type="text" value="abc.us.oracle.com"/>
Port	<input type="text" value="5601"/>
SSL Option	<input type="text" value="Disable"/>

Kibana Group Box

- c. Build the Kibana URL to ping using this host name and port number.

abc.us.oracle.com:5601/status

Use this URL with /status in a new browser session to ensure that Kibana displays *Green* status as shown in this example:



Kibana Status

Task 21-2: Deploying Kibana for Accounts Payable

The following table lists the Kibana dashboards that Accounts Payable provides:

Dashboard Name	Default Time Frame Value (saved with dashboard)
Early Detection and Monitoring	Today so far
Trend Analysis	Last 12 months

Note. These dashboards are also available as tiles that can be added to a homepage.

To deploy the delivered Accounts Payable Kibana dashboards:

1. Select PeopleTools, Search Framework, Administration, Deploy Kibana Dashboards.

2. Select all the dashboards, and deploy as shown in the following example:



Deploying the Delivered Dashboards

The status must show *Deployed* after deploying all the dashboards.

Early Detection and Trend Analysis dashboard tiles can then be added to a new homepage or an existing homepage.

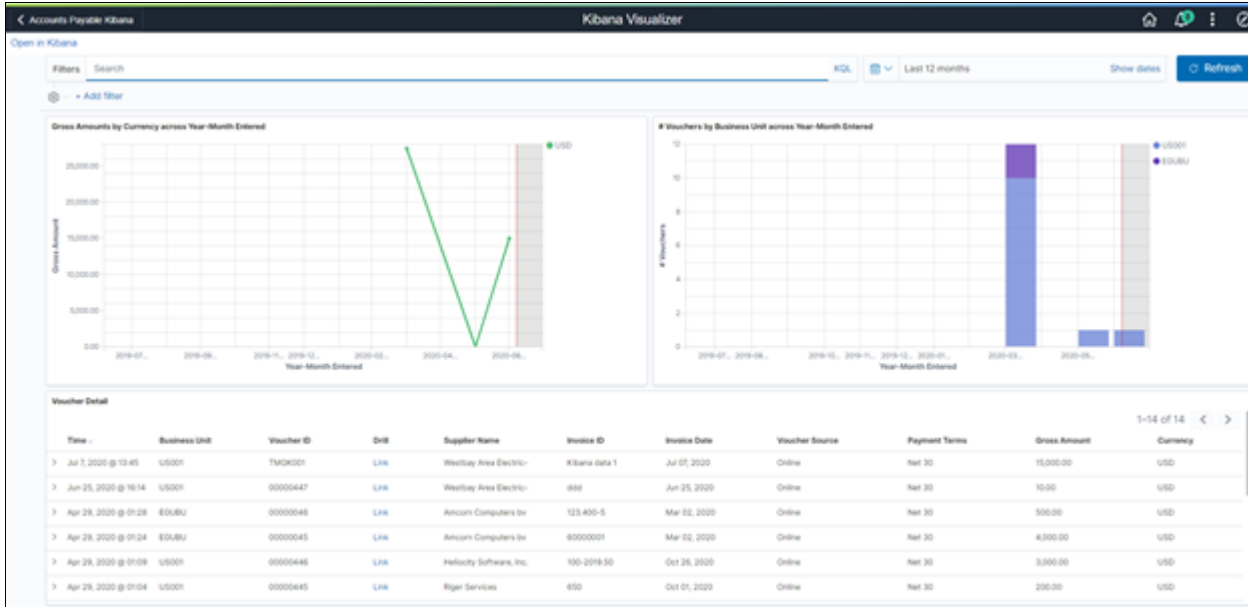
To add the tile, you can search for *Kibana*, *Early Detection*, or *Trend Analysis*.

See product documentation for FSCM: Application Fundamentals, "Setting Up and Using PeopleSoft Fluid for Financials and Supply Chain Management," for more information on adding a tile to a homepage.

Task 21-3: Reviewing Accounts Payable Dashboards

Oracle recommends having a single visualization in a dashboard for a homepage tile.

When you click anywhere on the dashboard tile, the dashboard appears in the Kibana Visualizer as shown in this example:



Kibana Visualizer

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

Gateway ID LOCAL Inbound Gateways
 Local Gateway Load Balancer JMS Administration
 URL Ping Gateway

Gateway Setup Properties
Load Gateway Connectors

Connectors		Personalize	Find	First	1-14 of 14	Last
*Connector ID	Description	*Connector Class Name				
1	APNS_TARGETCONNEC	APNTargetConnector	Properties	+	-	
2	AS2TARGET	AS2TargetConnector	Properties	+	-	
3	EXAMPLETARGETCONNI	ExampleTargetConnector	Properties	+	-	
4	FILEOUTPUT	SimpleFileTargetConnector	Properties	+	-	
5	FTPTARGET	FTPTargetConnector	Properties	+	-	
6	GETFILE	GetFileTargetConnector	Properties	+	-	
7	GETMAILTARGET	GetMailTargetConnector	Properties	+	-	
8	HTTPTARGET	HttpTargetConnector	Properties	+	-	
9	JMSTARGET	JMSTargetConnector	Properties	+	-	
10	PSFT81TARGET	ApplicationMessagingTargetConnector	Properties	+	-	
11	PSFTTARGET	PeopleSoftTargetConnector	Properties	+	-	
12	RIDCTARGET	RIDCTargetConnector	Properties	+	-	
13	SFTPTARGET	SFTPTargetConnector	Properties	+	-	
14	SMTPTARGET	SMTPTargetConnector	Properties	+	-	

Delete Gateway

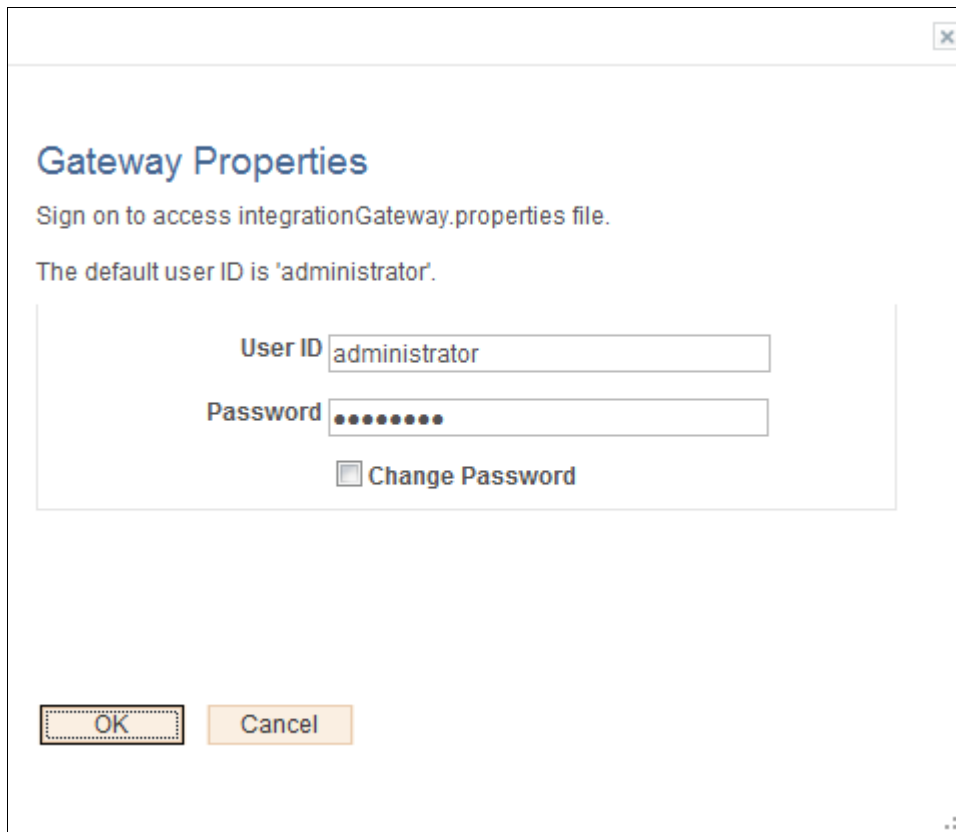
Save Return to Search

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

Sign on to access integrationGateway.properties file.

The default user ID is 'administrator'.

User ID

Password

Change Password

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

URL: http://localhost:8000/PSIGW/PeopleSoftListeningConnector

Gateway Default App. Server

App Server URL: //localhost:9000

User ID: VP1

Password: ***

Tools Release: 8.56-901-R1

Domain Password: ***

Virtual Server Node:

PeopleSoft Nodes

Node Name	App Server URL	User ID	Password	Tools Release	Domain Password	
PSFT_EP	//localhost:9000	VP1	***	8.56-901-R1	***	Ping Node + -
PSFT_HR	//localhost:9000	PS	***	8.56-901-R1	***	Ping Node + -

Advanced Properties Page

OK Cancel Save

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.

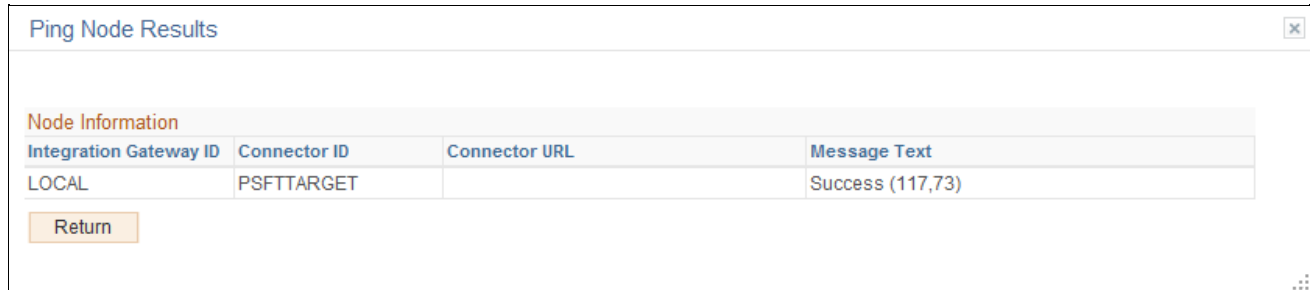
11. In the Tools Release field, enter the PeopleSoft PeopleTools release number.

Enter the exact release number that you obtain from pinging the gateway. Such as 8.58; it must match exactly.

12. Click Save.

- 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:



The screenshot shows a window titled "Ping Node Results" with a close button in the top right corner. Below the title bar, there is a section labeled "Node Information" in orange text. Underneath, there is a table with four columns: "Integration Gateway ID", "Connector ID", "Connector URL", and "Message Text". The table contains one row of data: "LOCAL", "PSFTTARGET", an empty cell, and "Success (117,73)". Below the table is a "Return" button.

Integration Gateway ID	Connector ID	Connector URL	Message Text
LOCAL	PSFTTARGET		Success (117,73)

Ping Node Results page

- 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.

- 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*.

The screenshot displays the 'Node Definitions' page for a node named 'PSFT_EP'. The page is organized into several sections:

- Navigation:** Tabs for 'Node Definitions', 'Connectors', 'Portal', 'WS Security', and 'Routings' are at the top.
- Node Information:** Fields include 'Node Name' (PSFT_EP), '*Description' (Financials/Supply Chain), and 'Node Type' (PIA).
- Authentication:** '*Authentication Option' is set to 'Password'. Checkboxes for 'Default Local Node', 'Local Node', and 'Active Node' are checked, while 'Non-Repudiation' and 'Segment Aware' are unchecked.
- Security Fields:** 'Node Password' and 'CheckTokenID' are masked with dots. A 'Create CheckTokenID' button is located to the right of the 'CheckTokenID' field.
- User and Reference Fields:** '*Default User ID' is set to 'VP1'. Other fields include 'Hub Node', 'Master Node', 'Company ID', 'IB Throttle Threshold', 'Image Name', and 'Codeset Group Name', each with a search icon.
- Actions:** 'Copy Node' and 'Rename Node' buttons are on the right. 'Save' and 'Return to Search' buttons are at the bottom left.
- Footer:** A breadcrumb trail shows 'Node Definitions | Connectors | Portal | WS Security | Routings'.

Node Definitions page for FSCM - PSFT_ EP Node

- On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
- In the Node Password field, enter a password.
- In the Confirm Password field, re-enter the password.
- Click the Create CheckTokenID button to generate CheckTokenID and note down the ID.
- Click Save, then click the Return to Search button.

- 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

- On the Node Definitions page, in the Authentication Option drop-down list box, select *Password*.
- In the Password field, enter a password.
- In the Confirm Password field, re-enter the password.
- Enter CheckTokenID. Copy ID generated in step 6 for PSFT_HR and PSFT_EP from HCM and FSCM respectively.
- 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*.

- 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:

The screenshot displays the configuration page for a Portal Node. At the top, there are navigation tabs: Node Definitions, Connectors, Portal (selected), WS Security, and Routings. The main content area is titled "Node Name ERP" and includes a "Details" section. The configuration fields are as follows:

- Description:** Portal Node - ERP
- Local Node:**
- Default Portal:** EMPLOYEE (dropdown menu)
- Tools Release:** 8.56-901.3
- Application Release:** Financials/SCM 9.20.
- Content URI Text:** Example: http://someserver/psc/pshome/; Value: http://<server>:<port>/psc/pshome/
- Portal URI Text:** Example: http://someserver/psp/pshome/; Value: http://<server>:<port>/psp/pshome/
- Portal Host Node:**
- Network Node Name:** (empty text field)

At the bottom left, there are two buttons: "Save" and "Return to Search". At the bottom, there is a breadcrumb trail: "Node Definitions | Connectors | Portal | WS Security | Routings".

Portal Node page for FSCM - ERP node

The screenshot displays the configuration page for a Portal Node named 'HRMS'. The page is organized into tabs: Node Definitions, Connectors, Portal (selected), WS Security, and Routings. The 'Node Name' is 'HRMS'. Under the 'Details' section, the 'Description' is 'Portal Node - HRMS' with a checked 'Local Node' checkbox. The 'Default Portal' is set to 'EMPLOYEE'. The 'Tools Release' is '8.56' and the 'Application Release' is 'HRMS 9.2'. The 'Content URI Text' field contains 'http://<server>:<port>/psc/pshome/' with an example above it. The 'Portal URI Text' field contains 'http://<server>:<port>/psp/pshome/' with an example above it. There is an unchecked 'Portal Host Node' checkbox and an empty 'Network Node Name' field. At the bottom, there are 'Save' and 'Return to Search' buttons, and a breadcrumb trail: Node Definitions | Connectors | Portal | WS Security | Routings.

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.

