

**ORACLE®**

PEOPLESOFT

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# Getting Started on PeopleSoft Installation

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**December 2015**

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# About This Documentation

This preface discusses:

- Understanding This Documentation
- Typographical Conventions
- Products
- Comments and Suggestions

## Understanding This Documentation

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This documentation contains information to help you in planning and preparing for a basic PeopleSoft installation. It introduces some of the concepts used in the PeopleSoft installation, and directs you to the resources you need to study before beginning your installation. As a general introduction, it would probably be most useful for new users.

## Typographical Conventions

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

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

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

## Products

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This documentation may refer to these Oracle products and product families:

- Oracle® BPEL Process Manager
- Oracle® Enterprise Manager
- Oracle® Secure Enterprise Search
- 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 Pay/Bill Management
- Oracle's PeopleSoft Enterprise Performance Management
- Oracle's PeopleSoft Financial Management
- Oracle's PeopleSoft Human Capital Management
- Oracle's PeopleSoft Interaction Hub
- Oracle's PeopleSoft PeopleTools
- Oracle's PeopleSoft Staffing Front Office
- Oracle's PeopleSoft Supply Chain Management
- Oracle's PeopleSoft Update Manager

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

## **Comments and Suggestions**

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

PSOFT-Infodev\_US@oracle.com

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

# Reviewing the PeopleSoft Architecture

This chapter discusses:

- Introducing the Installation Process
- Reviewing PeopleSoft Cloud Architecture
- Reviewing PeopleSoft Pure Internet Architecture
- Reviewing PeopleSoft Components

## Introducing the Installation Process

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Use this documentation as a starting point to plan your PeopleSoft installation. It may be especially helpful if you have never carried out any installation. This book introduces the PeopleSoft architecture and provides information on resources for researching and planning.

A PeopleSoft installation is a multi-step process that is designed to be applicable to a variety of situations and environments. To ensure a smooth and successful installation, use this book to help you with the decision-making and preparation that are needed to make your installation successful.

Planning and executing a PeopleSoft installation should include these tasks:

1. Choose the PeopleSoft products you want to install.  
Select your PeopleSoft Applications and choose the release.
2. Determine the PeopleSoft PeopleTools release that supports the PeopleSoft applications.
3. Choose your configuration.  
Determine the database platform, web server software, operating systems, and so on.
4. Read the PeopleSoft applications hardware and software requirements guides for an overview of the necessary hardware and software.
5. Review PeopleSoft certification information.  
Use the PeopleSoft certification information on My Oracle Support to get detailed support information for the servers and operating systems you choose.
6. Procure the necessary resources, including supported third-party software and hardware and accompanying documentation.
7. Download Oracle software and documentation.
8. Use the PeopleSoft PeopleTools installation guide to install the PeopleSoft PeopleTools and PeopleSoft application software.
9. Use the PeopleSoft application installation guides to complete any application-specific tasks.  
See PeopleSoft Install and Upgrade Resource, [http://docs.oracle.com/cd/E28611\\_01/InstallUpgrade\\_Resources\\_site.htm](http://docs.oracle.com/cd/E28611_01/InstallUpgrade_Resources_site.htm).

10. Use the resources on the PeopleSoft Online Help site to guide you in setting up advanced configurations.

See PeopleSoft Online Help,

[http://docs.oracle.com/cd/E17566\\_01/epm91pbr0/eng/psbooks/psft\\_homepage.htm](http://docs.oracle.com/cd/E17566_01/epm91pbr0/eng/psbooks/psft_homepage.htm).

## Reviewing PeopleSoft Cloud Architecture

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The PeopleSoft Cloud Architecture refers to several deployment packages (DPKs) that deliver pre-installed PeopleSoft components that can be deployed onto a customer's environment. If you are using a Microsoft Windows or Linux operating system, Oracle recommends that you use the PeopleSoft DPKs. The installation method from VCD used in previous releases is being deprecated on these operating systems and will be removed in future PeopleSoft PeopleTools releases; therefore, Oracle recommends that customers on Microsoft Windows and Linux move to the DPKs for their installations and patch updates.

Setting up your environment with the DPKs has the advantage of providing a complete installation, without the need to locate, download, and install additional components such as Oracle WebLogic web server software and Oracle Tuxedo.

The PeopleSoft Cloud Architecture offers the flexibility to use the DPKs on supported Microsoft Windows and Linux operating system platforms, both directly ("bare-metal") and on virtualization platforms. You can and should use the DPKs on your existing machines, as long as those machines are running a certified version of Microsoft Windows or Linux and have sufficient hardware resources.

The DPKs can be used with Oracle VirtualBox, similarly to the methods used for the PeopleSoft Update Images for PeopleSoft PeopleTools 8.53 and 8.54, and can also be deployed on other virtualization systems such as Oracle VM Manager and VMware® products.

The DPKs are available on My Oracle Support as zip files, and are delivered with a bootstrap script that automates the procedure to set up a PeopleSoft environment. The bootstrap script is an interactive script that verifies that the downloaded DPKs are correct, and prompts the user for the information required to set up the environment. The script also enables a user to choose various types of environments, such as a full tier, including a PeopleSoft database, or a mid-tier, with Application Server, web server and Process Scheduler, that connects to an existing database.

The DPKs are delivered with the PeopleSoft Puppet modules, which are initialization and management scripts based upon the open-source Puppet software. In addition to the convenience of using the interactive bootstrap script, you can take advantage of the PeopleSoft Puppet modules to customize and control the PeopleSoft virtual machines deployed from the DPKs.

See *PeopleSoft Deployment Packages Installation (PeopleSoft PeopleTools 8.55)*.

## Reviewing PeopleSoft Pure Internet Architecture

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The PeopleSoft Pure Internet Architecture is a server-centric execution architecture for deploying Internet applications to end users who access the applications through a web browser. These Internet applications are built using PeopleSoft PeopleTools. Because the PeopleSoft Pure Internet Architecture allows all end users to access the PeopleSoft applications through a web browser, the only users who will require Microsoft Windows machines and client configurations will be system administrators and developers who use the PeopleTools Development Environment.

PeopleSoft applications support numerous hardware and database choices. PeopleSoft servers run on the industry's leading hardware and software platforms. PeopleSoft applications look the same to application users, regardless of the database or hardware platform being used: mainframe, midrange, or PC workstation.

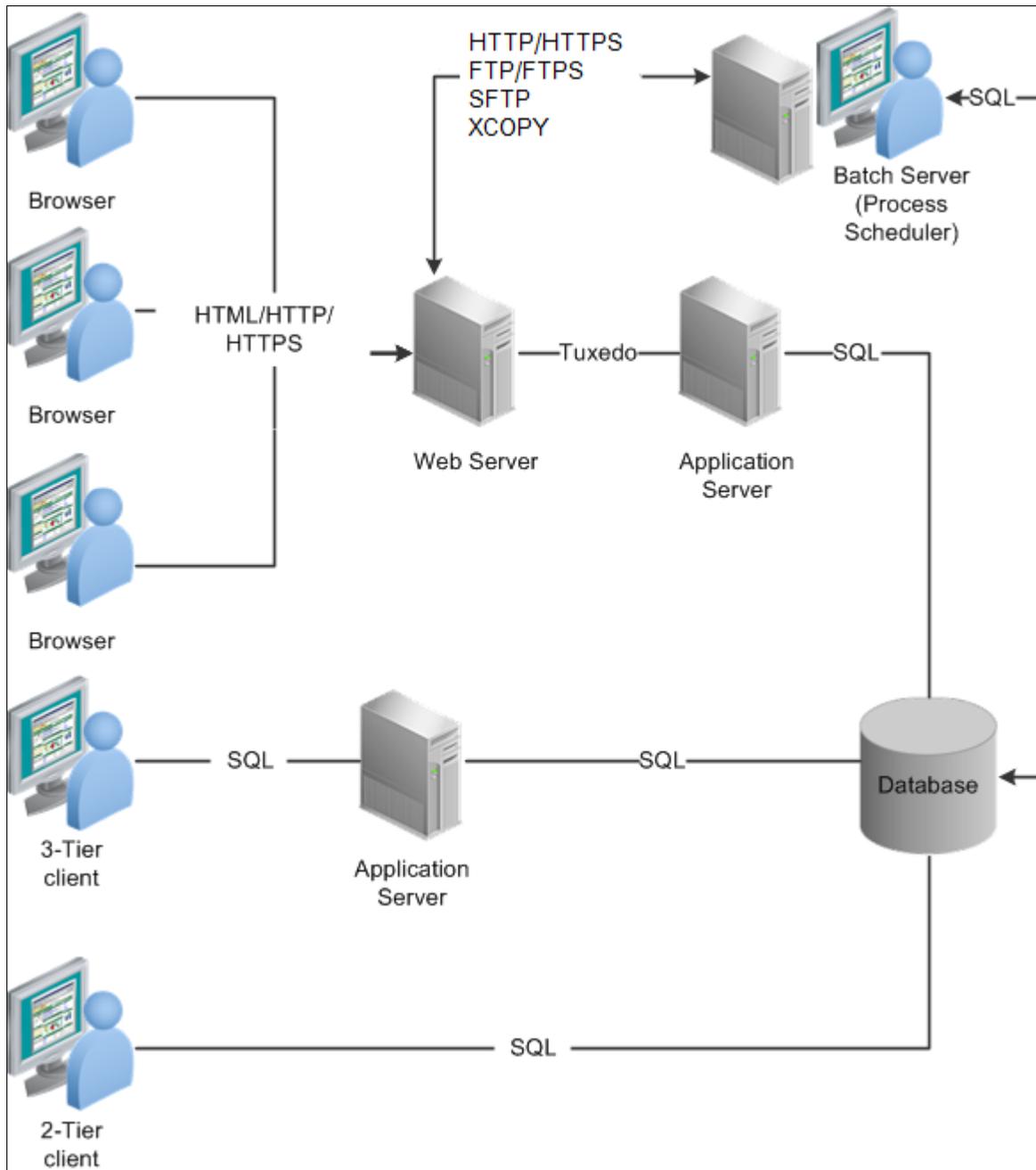
## **See Also**

*PeopleTools: Portal Technology*

*PeopleTools: Fluid User Interface Developer's Guide*

## Reviewing PeopleSoft Components

It may be helpful to review briefly the components of the PeopleSoft system as you plan your installation. While this figure shows a single instance of each component, a production environment would likely be more complicated, and may have several databases, application servers, or web servers. The following figure is a simplified representation of the major components of a PeopleSoft installation, displaying the connections between the database server, application server, Process Scheduler, web server, and end user browsers.



Basic PeopleSoft Architecture

The hardware and software you need to purchase, install, and test before installing your PeopleSoft application depends on the particular PeopleSoft configuration you choose. The components you need to consider include:

- *Database Server:* Your database server houses your PeopleSoft database. Before beginning the PeopleSoft installation, you should install the relational database management software (RDBMS) of your choice. There is a PeopleSoft PeopleTools installation guide for each of the four supported RDBMS platforms.

Your PeopleSoft database needs sufficient disk space to accommodate your operating system, one production and one test copy of your database, and all log files—this is in addition to any disk space required for training or development databases. When you are upgrading to a new PeopleSoft release, you will also need space for two additional copies of your database. Keep in mind that database sizes vary depending on the PeopleSoft Application use. Generally, a good practice is to initially oversize your storage media rather than undersize it and to maximize the amount of RAM on your system.

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**Note.** Depending on your PeopleSoft product, your application-specific installation documentation may include Demo database sizing information. Find the installation documentation for your PeopleSoft application on My Oracle Support.

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- *Application Server:* The PeopleSoft Pure Internet Architecture consists of the web server and the application server. You can run an application server on certified Microsoft Windows, UNIX, or Linux operating system platforms. Your application server should be a powerful machine with enough memory to ensure optimum performance.

The PeopleSoft application server uses Oracle Tuxedo middleware product, which is designed to enable distributed application computing. Oracle Tuxedo is packaged with Jolt, which acts as the communications layer between the web server and the application server. The application server services Jolt requests coming from the web server by running business logic and interpreting PeopleCode. To implement this service execution the application server sends SQL statements to the PeopleSoft Database Server. In addition, most of the PeopleSoft logic occurs on an application server—this is where pages are run and HTML is generated before being sent to the web server.

- *Web Server:* A web server is required for the PeopleSoft Pure Internet Architecture. It serves as the link between the end user's Internet browser and the application server, with which it communicates through Oracle Jolt.

The web server relays data back and forth between the user workstation and application server. The web server handles encryption and manages the connections between the browsers. It also caches and serves up images. This architecture should yield high performance on the network, because it only sends HTML to the client workstation.

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**Note.** You can set up your web server and application server on the same machine. You also have the flexibility of setting up a web server on a machine of its own, with the application server on a separate machine.

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- *Batch Server:* Your batch server runs your PeopleSoft batch processes. The term *batch server* is equivalent to the term *Process Scheduler* server. PeopleSoft batch processes, such as COBOL and SQR, are scheduled and invoked by a Process Scheduler server. The batch server maintains connectivity to the database. Any computer operating as a batch server must have database connectivity installed so that it can make a two-tier connection to the PeopleSoft database.

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**Note.** COBOL is not needed for PeopleSoft PeopleTools or for applications that contain no COBOL programs. If your application contains COBOL programs, you need to purchase a supported Micro Focus or IBM COBOL compiler.

See "PeopleSoft Enterprise Frequently Asked Questions About PeopleSoft and the Micro Focus COBOL Compiler" and "PeopleSoft Enterprise Frequently Asked Questions About PeopleSoft and the IBM COBOL Compiler" on My Oracle Support.

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- *PeopleTools Development Environment:* Microsoft Windows-based clients are referred to as the PeopleTools Development Environment. These clients—which run on supported Microsoft Windows platforms—can connect to the PeopleSoft database directly using client connectivity software (a two-tier connection) or through a PeopleSoft application server (a three-tier connection). The PeopleTools Development Environment is used primarily by application developers or system administrators.
- 

**Note.** PeopleSoft application servers, batch servers, and web servers are supported on Microsoft Windows Server operating systems, such as Microsoft Windows 2012 R2. The Microsoft Windows-based client (sometimes abbreviated "PT Client") is also supported on non-server Microsoft Windows operating systems, such as Microsoft Windows 7. Be aware that if you choose to run in three-tier mode from the Microsoft Windows-based client on Microsoft Windows 7, for example, you need to set up your application servers running on an operating system platform that is supported for PeopleSoft application servers.

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- *File Server:* The file server is the environment (or file) repository for the PeopleTools Development Environment and for the files necessary to perform an upgrade. This includes PeopleSoft Change Assistant and all of the executables and scripts which are necessary to perform an upgrade. In addition, the file server is a source repository for COBOL and SQR. You will apply patches and updates to the file server and then copy the updated files to your other servers.
- 

**Note.** The method that Oracle uses to deliver PeopleSoft maintenance has changed for PeopleSoft 9.2 applications. See resources on the PeopleSoft Update Manager Home Page, My Oracle Support, Doc ID 1641843.2.

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**Note.** Because the PeopleSoft Installer lets you install files to the designated server—whether it is an application server, batch server, database server, web server, and so on—the file server is not used to transfer the entire contents of your PeopleSoft software files to a file server, as it was in earlier releases, and you will not need to use the PeopleSoft Server Transfer program to transfer files from your file server to the desired server. *This does not hold true for the DB2 for z/OS platform*, which still requires a Microsoft Windows file server and uses Server Transfer.

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- *Two-tier access:* The client accesses the database directly.

In the two-tier architecture, application logic executes on the client machine using data it receives from the PeopleSoft database located on a separate relational database management system (RDBMS) server. The client/server network conversation uses SQL to transmit database calls.

- *Three-tier access:* The client uses the application server to manage the connection to the database.

In a three-tier configuration, the application processing logic runs on the application server. In this case, RDBMS connectivity is no longer required on the client. The client uses Oracle Tuxedo to send messages to the application server, which, in turn, sends the appropriate SQL to the database server.

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**Note.** You control the establishment of a two-tier or three-tier connection by your choice of login credentials. The installation guides specify which user name to use for each type of access. In addition to two-tier and three-tier access, you can access the database using SQL tools that are specific to your RDBMS platform.

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- *End User Workstation:* Each employee in your company who needs to use PeopleSoft applications requires a computer with one of the certified web browsers.

See My Oracle Support, Certifications, for web browsers that are certified for your release.

Under the PeopleSoft Pure Internet Architecture, the browser communicates with the web server via HTTPS. The web server translates the request and communicates with the application server with Jolt. The application server interprets these messages and sends SQL to the database server.

- *Other Hardware/Software:* You may need extra hardware and software for optional PeopleSoft functionality or to support the application you are running. This may include the following:

- **Application Engine:** The PeopleSoft PeopleTools Application Engine is used primarily for batch processes. It has a GUI definitional "front end" that allows you to define and maintain your Application Engine programs, and a "back end" that executes the programs that you have defined. The Application Engine is tightly coupled to the PeopleSoft PeopleTools environment, which results in improved flexibility and power. For instance, there is tight integration with PeopleSoft PeopleTools objects and features such as PeopleCode, Business Components, Tree APIs, Application Messaging, and Business Interlinks. There is also seamless integration into an online application within the same unit of work.
- **Oracle Secure Enterprise Search:** You have the option to use Oracle Secure Enterprise Search (SES) for application searches. Oracle SES is the search engine on which the PeopleSoft Search Framework relies. For information on configuring search for your installation using Oracle SES, see the installation guide specific to your PeopleSoft application.

See *PeopleTools: Search Technology*.

See PeopleSoft application-specific installation guides on My Oracle Support.

- **LDAP Server:** You have the option to use a Lightweight Directory Access Protocol (LDAP) server for authentication and authorization.
- **Reporting Software:** Oracle Business Intelligence (BI) Publisher is the strategic PeopleSoft reporting option provided beginning with PeopleSoft PeopleTools 8.52.

See *PeopleTools: BI Publisher for PeopleSoft*.

For information on other reporting and analysis tools supported for PeopleSoft systems, see the PeopleSoft product documentation.

See *PeopleTools: Pivot Grid*.

See *PeopleTools: PS/nVision*.

See *PeopleTools: Query*.

See *PeopleTools: SQR for PeopleSoft Developers*.

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**Note.** The various servers identified above (application, web, and so on) are considered "logical" servers. Many can exist on the same machine, although each can also reside on its own machine in a "physical" configuration.

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## See Also

"Planning Your PeopleSoft Installation," Reviewing Hardware Recommendations



## Chapter 2

# Planning Your PeopleSoft Installation

This chapter discusses:

- Understanding Planning and Research
- Researching Product Information
- Researching Support Information
- Reviewing Hardware Recommendations
- Assembling Your Installation Team

## Understanding Planning and Research

There are several online resources that you can take advantage of in researching PeopleSoft products and planning your installation. The first two sections in this chapter list some of these resources. When you are ready to obtain the software and documentation for your installation, use the information later in this documentation to find the necessary resources.

See "Installing the Software."

## Researching Product Information

Begin the research for your installation by deciding which application products you will install. You should review and compare the release information to find the features that you want.

Use the following information on Oracle web sites to review and choose your PeopleSoft application products:

- The Oracle PeopleSoft product area gives an overview of the PeopleSoft applications.  
See Oracle PeopleSoft Applications, <http://www.oracle.com/us/products/applications/peoplesoft-enterprise/overview/index.html>.
- PeopleSoft Information Portal  
See Oracle's PeopleSoft Information Portal, <http://www.peoplesoftinfo.com>.

The PeopleSoft Information Portal assembles the documentation, training, and other resources to assist you in implementing PeopleSoft products. The portal includes the following sections for each product family:

- The Home page includes the Breaking News section, which is updated frequently with alerts and other updates.
- The New Feature Info page includes links to the Cumulative Feature Overview and Planned Features and Enhancement tools, as well as links to Release Value Proposition information.
- The Documentation page includes links to Business Process Maps, Entity Relationship Diagrams, and documentation home pages.

- The Install, Upgrade, & Maintain page includes links to recent installation, upgrade, and maintenance update documentation.
- The Product Data Sheets page includes links for data sheets listed by product.
- The Social Media & Forums page includes links to PeopleSoft Forums, and Facebook, Twitter, and so on.
- The Training page includes links to Oracle University courses, Oracle PeopleSoft Learning Streams, User Productivity Kit (UPK), and other resources.
- The PeopleSoft Planned Features and Enhancements information center provides a high-level view of planned new features and enhancements for the PeopleSoft product line.  
See PeopleSoft Planned Features and Enhancements, My Oracle Support, Doc ID 1966243.2.
- The Cumulative Feature Overview tool provides concise descriptions of new and enhanced solutions and functionality that have become available between starting and target releases.  
See Cumulative Feature Overview,  
[https://apexapps.oracle.com/pls/apex/f?p=10319:18:109747497351098::NO:18:P18\\_X\\_PRODUCTLINE,P18\\_X\\_IMG\\_HID:PT,PT.gif](https://apexapps.oracle.com/pls/apex/f?p=10319:18:109747497351098::NO:18:P18_X_PRODUCTLINE,P18_X_IMG_HID:PT,PT.gif).
- The application unlimited policy discusses Oracle's support of PeopleSoft applications.  
See Oracle Applications Unlimited, <http://www.oracle.com/us/products/applications/035482.htm>.
- The Release Notes for PeopleSoft PeopleTools and PeopleSoft applications describe the new features for a release.  
To find the release notes, search on My Oracle Support, or use the PeopleSoft Information Portal.
- Release Value Propositions for PeopleSoft PeopleTools and PeopleSoft applications.  
Release Value Propositions provide an overview of the value proposition that is associated with the new features and enhancements that are planned for a PeopleSoft PeopleTools release. Use it to help you assess the business benefits of a PeopleSoft PeopleTools release and to plan your information technology (IT) projects and investments. To find the Release Value Proposition for your PeopleSoft application, search My Oracle Support.
- Check the advisor webcast page on My Oracle Support (Doc ID 548764.1) for web casts covering new features and enhancements.
- Benchmark performance reports for various PeopleSoft products.  
See Oracle PeopleSoft Benchmark White Papers, Oracle Technology Network,  
<http://www.oracle.com/us/solutions/benchmark/apps-benchmark/peoplesoft-167486.html>.  
PeopleSoft benchmarks demonstrate our software's performance characteristics for a range of processing volumes in a specific configuration. Customers and prospects can use this information to determine the software, hardware, and network configurations necessary to support their processing volumes.
- PeopleTools Performance Guidelines Red Paper on My Oracle Support  
See My Oracle Support, Doc ID 747389.1.  
This is a guide for technical users, installers, system administrators, and programmers who implement, maintain, or develop applications for Oracle's PeopleSoft Enterprise Applications. This document provides guidelines on how to diagnose a PeopleSoft Online Transaction environment, including PeopleSoft Pure Internet Architecture and Portal configuration.

## **Researching Support Information**

This section discusses:

- Determining the PeopleSoft PeopleTools Release Level
- Reviewing PeopleSoft Certifications
- Reviewing Maintenance Information

## Determining the PeopleSoft PeopleTools Release Level

After you decide which PeopleSoft application releases to install, you need to obtain detailed information on the supported PeopleSoft PeopleTools release, and supported hardware and software.

Search for the product name and release in the Certifications area on My Oracle Support. The name should begin with "PeopleSoft", such as PeopleSoft Enterprise Learning Management. The PeopleSoft PeopleTools releases that are supported for the PeopleSoft application are listed in the search results.

### See Also

Lifetime Support Summary for PeopleSoft Releases, My Oracle Support, Doc ID 1348959.1

## Reviewing PeopleSoft Certifications

It is important that you verify that you have the correct hardware and software in place to support a successful installation. For a detailed, up-to-date resource, search the Certifications area in My Oracle Support for your PeopleSoft PeopleTools release. Here you can find the most current support information on the operating systems, RDBMS versions, client connectivity versions, required compiler versions, and additional component versions.

See Reviewing PeopleSoft Components in this documentation for a broad overview of the components included in a basic PeopleSoft PeopleTools installation.

The Certifications are divided into categories. Note that you may need look in several categories to get the information for all of the components for your environment. Be sure to view the Certification Notes for each item. For example, connectivity clients such as Oracle Database Client or IBM DB2 Connect are included in the information for PeopleSoft PeopleTools in the category Desktop Applications, Browsers and Clients, and the Certification Notes include tables describing the support for PeopleSoft Application Server, Batch Servers, and the PeopleTools Client.

See PeopleSoft PeopleTools Certifications, My Oracle Support, Doc ID 747587.1, for information on searching using the Certifications application.

In addition to the Certification information for PeopleSoft PeopleTools on My Oracle Support, use the hardware and software requirements guides on My Oracle Support to get an overview of the requirements for the PeopleSoft application releases you plan to install.

You can also find information, appropriate to your database platform and other configuration, on patches required for installation.

See Operating System, RDBMS & Additional Component Patches Required for Installation PeopleTools - Master List, My Oracle Support, Doc ID 756571.1.

### See Also

Reviewing Hardware Recommendations

## Reviewing Maintenance Information

You can search for and download the necessary patches and updates for your PeopleSoft installation from the Patches & Updates tab on My Oracle Support.

See the PeopleTools installation guide for your database platform, "Preparing for Installation," Reviewing Patches and Updates Required at Installation.

Note that for PeopleSoft 9.2 applications, finding and applying patches takes advantage of the PeopleSoft Update Manager.

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

To prepare for upcoming bundles and maintenance packs, use the maintenance schedules on My Oracle Support. The schedules include information on application bundles and PeopleSoft PeopleTools fixes by quarter, product line, and individual products.

See the PeopleTools installation guide for your database platform, "Preparing for Installation," Considering Project Planning.

## Reviewing Hardware Recommendations

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This section discusses:

- Understanding Hardware Recommendations
- Defining File Server Hardware Recommendations
- Defining Application Server Hardware Recommendations
- Defining Web Server Hardware Recommendations
- Defining Process Scheduler Server Hardware Recommendations
- Defining PeopleTools Development Environment Hardware Recommendations
- Defining End User Workstation Hardware Recommendations
- Defining Oracle Secure Enterprise Search Hardware Recommendations

## Understanding Hardware Recommendations

This section describes the recommended hardware for the components in a basic PeopleSoft PeopleTools installation. Due to the large number of possible combinations of hardware, operating systems, database servers and so on, we do not include specific sizing information in this document. Check with your hardware vendor for published benchmark reports to estimate your sizing requirements.

Internet connectivity is required for remote PeopleSoft maintenance and connectivity between PeopleSoft components, as well as access to My Oracle Support, Oracle Software Delivery Cloud, and other Oracle sites. You need the appropriate network interface card and cabling to connect to the network. The higher the connection speed the better.

Remember to use My Oracle Support, Certifications, for the most current and complete hardware requirements, and consult the PeopleSoft application-specific hardware and software requirement guides for additional requirements. For example, if you are installing PeopleSoft Human Capital Management products, after reviewing these requirements, search for the HCM hardware and software guide on My Oracle Support.

## Defining File Server Hardware Recommendations

A typical file server configuration requires the following items:

- A x86-64 based machine running Microsoft Windows 2012 or later.
- Sufficient disk space to accommodate the following:
  - PeopleSoft software — 20 GB or more, depending upon the PeopleSoft applications
  - Operating system and any optional monitoring software
  - Other required third-party software, such as Microsoft Office, as required by the application or customer.
- Sufficient memory to meet your network operating system requirements.
- VGA display output with resolution of 1024 x 768 with 16K colors required.
- Backup system

## Defining Application Server Hardware Recommendations

This section includes hardware recommendations for PeopleSoft Application Servers. These recommendations are meant for PeopleSoft PeopleTools-only installations. Recommendations for PeopleSoft applications vary depending upon the deployed application and the transactions being run. See the application-specific installation and hardware and software documentation for more information.

- A minimum of two processors is recommended, and at least four processors for production.
- Oracle recommends the latest or near-latest processors available.
- The memory requirement is 8 GB (minimum) per server for roughly up to 25 users.
- Oracle Tuxedo requires 1 GB RAM minimum, and at least 4 MB of RAM for each Oracle Tuxedo system server.

See the Oracle Tuxedo documentation for more details.

- Sufficient disk space to accommodate:
  - Oracle Tuxedo (200 MB)
  - COBOL Compiler
 

Micro Focus and IBM COBOL compilers are supported for PeopleSoft installations. See the hardware requirements provided by the respective vendors.

See "PeopleSoft Enterprise Frequently Asked Questions About PeopleSoft and the Micro Focus COBOL Compiler" and "PeopleSoft Enterprise Frequently Asked Questions About PeopleSoft and the IBM COBOL Compiler" on My Oracle Support (search for the titles).
- Database connectivity package varies per database RDBMS platform. Check with your vendor for requirements.
- PeopleSoft Application Server files and code (4 GB)
- Oracle recommends an additional 512 MB to 1 GB of disk space, depending on the applications installed.

## Defining Web Server Hardware Recommendations

Web servers are multi-threaded and will use one or more threads per active user. Further they are based on Java. There will be significant benefit from running the web server on multi-processor and multi-core machines with large amounts of memory.

- 4 GB of memory or higher is recommended for each web server.
- 1 GB recommended disk space for the web server software.
- The space required for log files depends upon the number of web server domains and number and type of log ins to the PeopleSoft Pure Internet Architecture.
- PeopleSoft web servers tend to use a very high number of execute threads, file descriptors, and TCP sockets. Proper tuning in these areas is required.

## Defining Process Scheduler Server Hardware Recommendations

The following are Process Scheduler server hardware requirements:

- Sufficient disk space to accommodate the operating system.  
See My Oracle Support, Certifications, for supported operating systems.
- Backup device
- Video controller and display

## Defining PeopleTools Development Environment Hardware Recommendations

The following list presents the hardware recommendations for a workstation being used as a PeopleTools Development Environment. Obviously, the faster your machine, the faster its response time. To achieve optimal performance, you should invest in hardware that maximizes the performance of your operating system environment.

- A x86-64 based machine from around 2010 or later.  
Oracle recommends for PeopleSoft installation a machine with at least 256 GB disk space and a CPU similar to an Intel® Core™ i5 or comparable chip with at least 8 GB of RAM. The machine can be a desktop, laptop, workstation, virtual machine and so on.
- VGA controller and display of 1024 x 768 resolution or higher and minimum 256 color mode with small font size.

## Defining End User Workstation Hardware Recommendations

General end user workstation hardware requirements are as follows:

- *Memory requirements:* While additional memory is generally beneficial, 4 GB of RAM is the minimum recommended for 64-bit computers.
- *CPU requirements:* Intel® Core™ i3 or equivalent is recommended.  
Faster processors will result in better PeopleSoft product response times.
- *Browser version:* The response time also improves with the latest versions of browsers.  
See the My Oracle Support Certification area for browser requirements.
- *Screen resolution requirements:* VGA controller and display of 1024 x 768 resolution or higher and High Color (16 bit) mode for the best display results.

In the PeopleSoft Pure Internet Architecture (PIA), the web browser renders the user interface. The web browser receives the HTML generated by the application server and displays the graphic representation of the HTML. The CPU speed of the client has a great influence on how fast these HTML pages are rendered. HTML pages for some PeopleSoft applications can be quite complicated. The web browser should be configured to take advantage of the HTTP 1.1 Protocol and should also allow adequate disk space for HTML object caching.

Beginning with PeopleSoft PeopleTools 8.54, the PeopleSoft Fluid User Interface is supported on many platforms for mobile devices, including iOS and Android. The PeopleSoft Fluid User Interface is optimized for mobile devices. Review the product documentation to consider including this functionality for your end users.

See *PeopleTools: Developer's Guide for PeopleSoft Fluid User Interface*.

See the Certifications area on My Oracle Support for information on supported mobile devices.

End user workstations for power users must be able to carry out operations such as intensive data-entry, navigating between many pages, and so on. Power users may require workstations with specifications greater than the manufacturer's minimum for a given web browser and operating system combination. PeopleSoft products will function on platforms meeting the manufacturer's minimum requirements for a given web browser and operating system combination, but will not deliver the optimal user experience for power users.

In addition to the requirements listed above for general users, typical workstations for power users require 8 GB RAM of memory on the client. Microsoft Windows 7 is the minimum supported operating system version. This assumes that a typical power user will run three browsers (two for transactions, one for process monitor).

See hardware requirements in Microsoft documentation.

## Defining Oracle Secure Enterprise Search Hardware Recommendations

For information on the recommendations for bringing up an Oracle Secure Enterprise Search (SES) environment, consult the Oracle SES product documentation.

See the Oracle Secure Enterprise Search installation guide for your operating system on the Oracle Technology Network, <http://www.oracle.com/technetwork/search/oses/documentation/ses-096384.html>.

For recommendations on Oracle SES searches carried out with a PeopleSoft application, consult My Oracle Support knowledge base.

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**Important!** Before installing Oracle's Secure Enterprise Search (SES) we highly recommend that you review our deployment and sizing recommendations provided in "Oracle Secure Enterprise Search Deployment Considerations for PeopleSoft 9.2" (Doc ID 1684035.1) found on My Oracle Support. This article provides information regarding the essential hardware for SES and information to help ensure capacity for peak concurrent usage of your PeopleSoft 9.2 environment. Failing to follow these recommendations can impact the performance and stability of your PeopleSoft 9.2 environment.

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### See Also

*Oracle Secure Enterprise Search Administrator's Guide*, Oracle Technology Network, <http://www.oracle.com/technetwork/search/oses/documentation/ses-096384.html>

*PeopleTools: Search Technology*

## Assembling Your Installation Team

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When planning your PeopleSoft installation, you may require contributors with a variety of skills, experience, and time commitments. The contributors may be fully or partly dedicated to the installation, permanent company members or hired as consultants expressly for the installation. In addition to the roles listed in this section, you may need additional resources depending upon your specific applications and the complexity of your particular environment.

Some of the key roles are listed below:

- Database administrator (DBA)

The DBA's responsibilities may be on a part-time or on-call basis, but it is critical to have a DBA familiar with your database platform. The DBA may be responsible for the following tasks:

- Review scripts and modify, if necessary, to comply with the standards of your environment.
- Monitor database and provide database support.
- Perform backups and recoveries.
- Troubleshoot and tune database.
- Enforce standards.

- Network administrator

The network administrator will provide network and server support. Similar to the DBA, this individual does not need to be assigned full-time. Your network administrator may be responsible for the following duties:

- Manage network security and connectivity.
- Troubleshoot network related issues.
- Network configuration.

- System administrator/web administrator

The system administrator should have working knowledge of the server operating system and PeopleSoft's technical architecture. The system administrator may need to be involved only on a part-time basis. The system administrator position is responsible for the following tasks:

- Manage logins, passwords, and system security.
- Troubleshoot server issues

- PeopleSoft installer

You may want to hire a PeopleSoft installer. If you choose to self-install, consider having a PeopleSoft installer certify your install before starting the upgrade.

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**Note.** Many customers elect to use Oracle Consulting or other third-party consultants to assist them in various aspects of their upgrade process. The Oracle web site has more information on Oracle Consulting's upgrade services. See <http://www.oracle.com/us/products/consulting/index.htm>.

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Your PeopleSoft installer should fill the following roles:

- Install Oracle-delivered software.
- Create and install PeopleSoft Demo and Sys databases.
- Configure the application server domains, web server, and Process Scheduler.
- Complete and install the verification test.
- PeopleSoft administrator

The PeopleSoft administrator should have a basic understanding of the PeopleSoft system, and should have the necessary skills to maintain and support the environment. In addition, the PeopleSoft administrator may need to act as a project manager in interacting with the other administrators and developers who work on the PeopleSoft system. PeopleSoft administrators should have a working knowledge of:

- PeopleSoft system navigation
- PeopleSoft windows, menus, and pages, and how to modify them
- User accounts

The PeopleSoft administrator should understand the various user account and roles that can be used to connect to the database.

- Your RDBMS and operating system
  - SQL and SQL command syntax
  - PeopleTools, including PeopleSoft Data Mover, PeopleSoft Change Assistant, PeopleCode, and Application Engine
  - Maintenance, updates, and patches
- Application developers
- Developers may require SQR, COBOL, PeopleTools, Application Engine, PeopleSoft Query, and PS/nVision experience, depending upon your customizations. Developers will fill the following roles:
- Create and modify customizations to meet business needs.
  - Document all changes.



## Chapter 3

# Installing the Software

This chapter discusses:

- Obtaining Installation Files
- Assembling Installation Documentation
- Reviewing PeopleSoft PeopleTools Utilities
- Starting the Installation

## Obtaining Installation Files

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Before beginning the installation, obtain the PeopleSoft installation software and documentation by downloading the necessary zip files from the Oracle Software Delivery Cloud portal. Use the Readme files to be sure that you obtain all the zip files required for your environment.

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**Note.** The Oracle Software Delivery Cloud web site was formerly named Oracle E-Delivery.

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Several chapters in the PeopleSoft PeopleTools installation guides include sections on how to download specific files from Oracle Software Delivery Cloud. You may be able to skip these sections if your planning process has helped you to download all the files you need at the beginning of the installation process.

See Oracle Software Delivery Cloud, <http://edelivery.oracle.com>.

## Assembling Installation Documentation

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Before you begin your installation, you should have the following documentation ready for reference:

- Download the PeopleTools installation guide for your database platform.  
There are four installation guides for PeopleSoft PeopleTools, to correspond to the supported RDBMS platforms: DB2 for z/OS, DB2 for Linux, UNIX, and Windows, Microsoft SQL Server, and Oracle. The installation guides cover the steps needed for a basic installation. For advanced procedures, you are referred to PeopleSoft documentation resources.  
Be sure to read the chapter "Preparing for Installation" in the PeopleSoft PeopleTools installation guides to learn about specific requirements, such as connectivity software and user IDs, for the RDBMS (also sometimes referred to simply as database platforms) you use for your installation.
- Download the application-specific installation guides for your PeopleSoft Application.  
You can download the installation guide for PeopleSoft PeopleTools and your PeopleSoft Application, along with this getting started guide, when you download the installation software. You can also find the installation guides on My Oracle Support.
- Locate the database administration manuals provided by your RDBMS vendor.

- Use the *PeopleTools: Data Management* product documentation for administration information regarding using your RDBMS platform in a PeopleSoft installation.
- Locate the network administration manuals provided by your network vendor.
- Locate the installation and configuration manuals for additional software components used with the PeopleSoft installation, such as the web server software and Oracle SES for searching.

## Reviewing PeopleSoft PeopleTools Utilities

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The PeopleSoft PeopleTools installation includes several utilities that you use in setting up and administering PeopleSoft software. While there are several other tools included with PeopleSoft PeopleTools, the tools listed here are referred to during the installation process. These tools include:

- The *PeopleSoft installer* guides you through the process of installing files to the various servers. Depending upon your configuration, it can be used either as a Graphical User Interface (GUI) utility or a command-line executable. Some components also support silent installation.
- *Configuration Manager* is a GUI utility for configuring workstations being used as the PeopleTools Development Environment.

When you use Configuration Manager to set up the workstation, it creates a Microsoft Windows program group with PeopleSoft PeopleTools utilities.

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**Note.** This Configuration Manager, which is included with PeopleSoft PeopleTools, should not be confused with the Oracle Configuration Manager, which is used to connect to My Oracle Support.

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See the PeopleTools installation guide for your database platform, "Setting Up The Install Workstation."

See *PeopleTools: Change Assistant and Update Manager*.

- *Database Configuration Wizard (DCW)* is a GUI utility that guides you through the PeopleSoft database installation. Access the DCW executable from the PeopleSoft PeopleTools installation directory. The underlying mechanism for the DCW is Data Mover, which is described below.

There are some installation configurations that cannot use the DCW for database setup. These cases are noted in the installation guides. In these cases, you must create the PeopleSoft database using the manual method. Manual database creation was used in early PeopleSoft releases, and can also be used to help you troubleshoot problems.

See the chapters on creating a database in the PeopleTools installation guide for your database platform.

- *Data Mover* is a utility used to manipulate data, run SQL scripts, and control database access and security. Data Mover runs transparently when you use the DCW. Note that you can use Data Mover to access the PeopleSoft database using either two-tier or three-tier mode, depending upon the user name and password you use to log in. You can access it from the workstation program group or from the PeopleSoft PeopleTools installation directory.

See *PeopleTools: Data Management*.

- *PSADMIN* is a command-line executable used during the installation to set up and manage application server domains and Process Scheduler domains. You can access psadmin.exe from the PeopleSoft PeopleTools installation directory.

See the chapters on configuring the Application Server and setting up Process Scheduler in the PeopleSoft PeopleTools installation guides.

- *Application Designer* is the core development tool used to build and modify PeopleSoft applications. In the installation process you use Application Designer to test the two-tier and three-tier connections. You

control whether the connection is two-tier or three-tier by your choice of log in user name and password. You can access it from the workstation program group or from the PeopleSoft PeopleTools installation directory.

See *PeopleTools: PeopleSoft Application Designer Developer's Guide*.

- *PeopleSoft Change Assistant* is a standalone application used for software updates, maintenance updates, and applying patches and fixes. Beginning with the PeopleSoft PeopleTools 8.53 release, Change Assistant integrates with the PeopleSoft Upgrade Manager for creating change packages.

The installation executable for PeopleSoft Change Assistant is included in the PeopleSoft PeopleTools installation directory.

See *PeopleTools: Change Assistant and Update Manager*.

## Starting the Installation

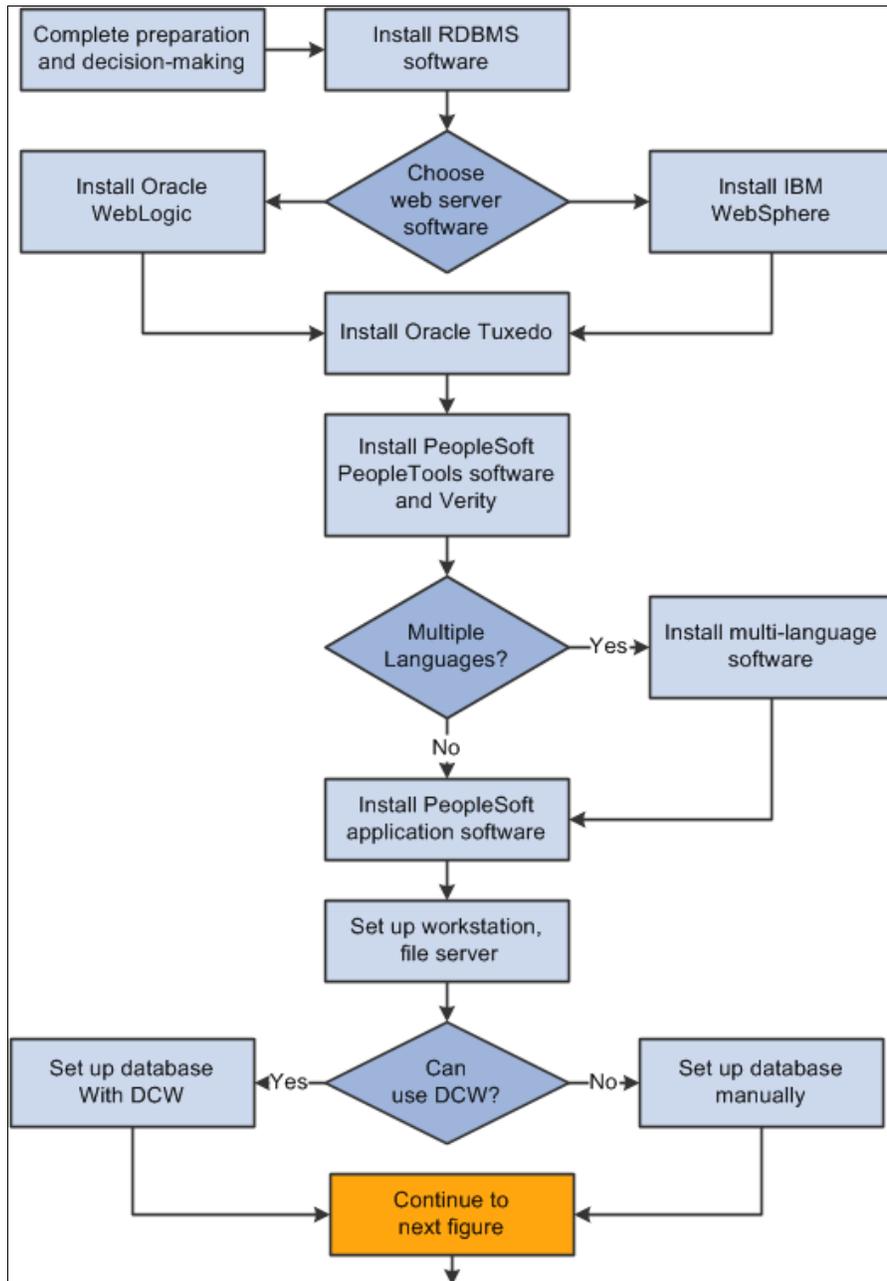
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The following flowcharts give an overview of a basic PeopleSoft installation. The process shown here essentially follows the chapters in the PeopleSoft PeopleTools installation guides. Each installation guide includes instructions for a variety of configurations; it is a good idea to go through the guide before beginning the installation and determine those sections that relate to your case. Remember that there are also application-specific installation instructions.

In those cases in which the instructions differ for installations on Microsoft Windows and UNIX or Linux operating systems, the installation guides include both versions. Here are notes on some of the decision points included in the flowcharts:

*Multiple languages?* Read the section Planning Multilingual Strategy in the first chapter of the installation guides for guidance.

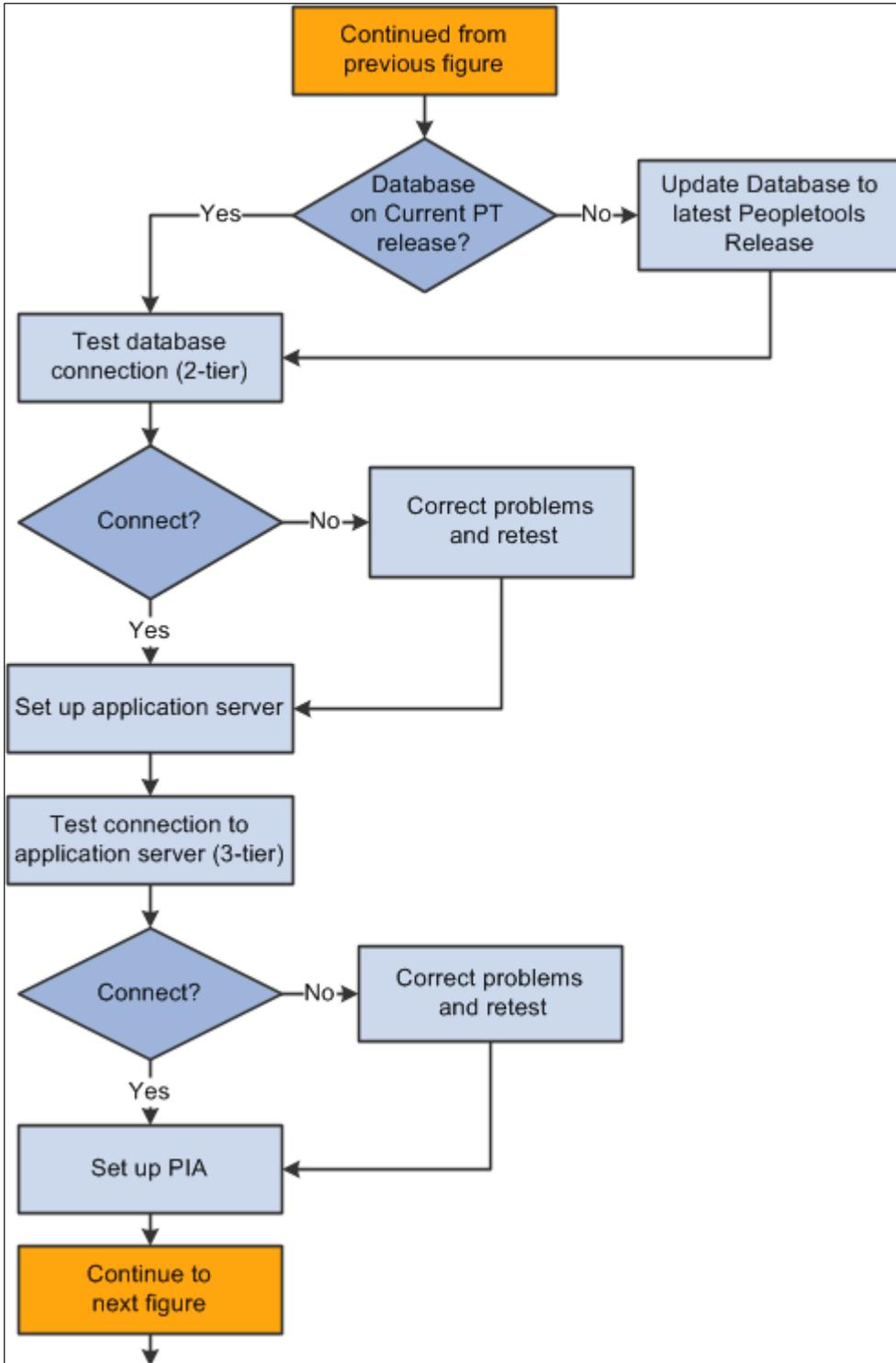
*Can use DCW?* Read the notes at the beginning of the chapters on creating a database to determine whether the Database Configuration Wizard is appropriate for your installation.



Installation Flow, Part 1

*Database on current PT release?* Depending upon which PeopleSoft PeopleTools release was used to build your PeopleSoft application, you may need to run a series of steps to update the database to the latest PeopleTools release. The installation guides include guidance on whether to update the database, but you can also get information from the PeopleSoft certification information on My Oracle Support, as mentioned in an earlier chapter.

*Correct problems and retest.* It is a good idea to verify a connection to the database as you proceed through the stages of the installation. For example, after setting up the application server, the installation guides recommend that you connect to the database using PeopleSoft Application Designer.



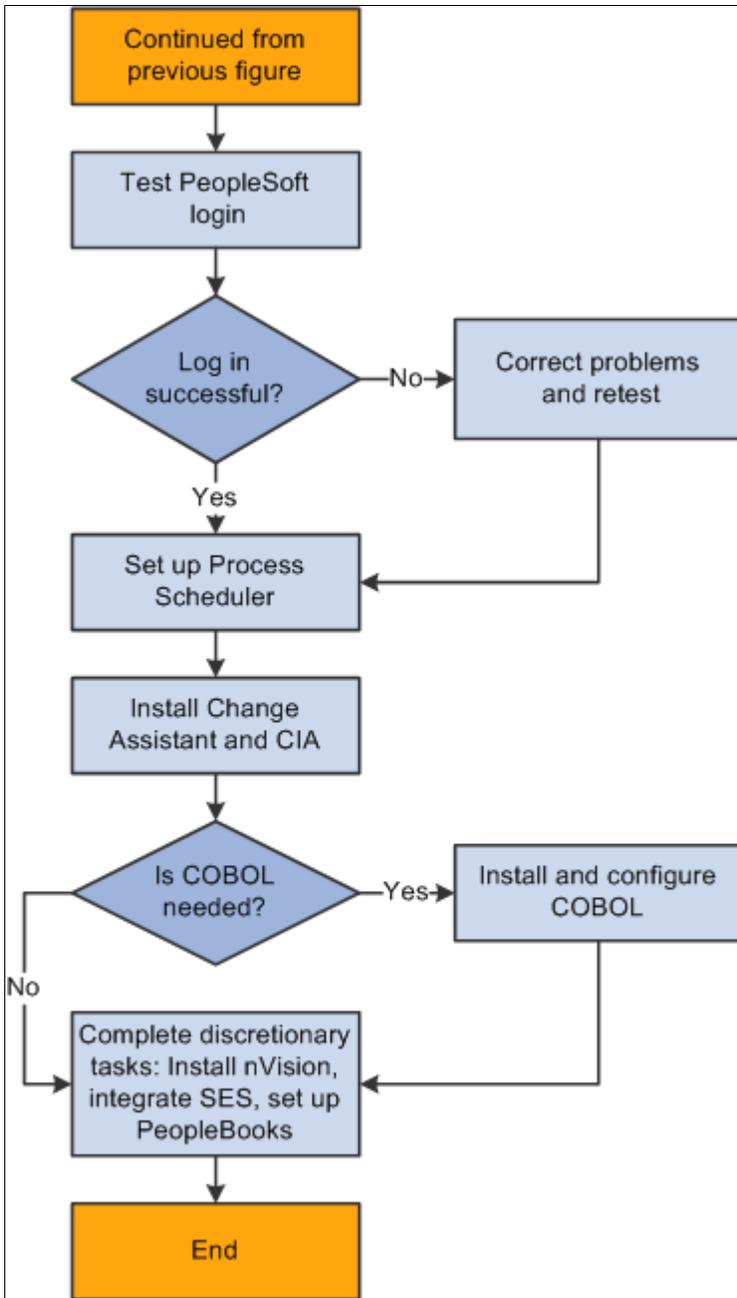
Installation Flow, Part 2

*Is COBOL needed?* COBOL is not needed for PeopleSoft PeopleTools or for product applications that contain no COBOL programs. To determine whether your installation requires COBOL, use this COBOL information on My Oracle Support. Search for the article name "PeopleSoft Enterprise Frequently Asked Questions About PeopleSoft and the Micro Focus COBOL Compiler" (My Oracle Support, Doc ID 747059.1). The page includes a list of topics that should help you determine whether you need COBOL for your PeopleSoft installation. Use the tool included under the question "Which PeopleSoft product lines use Micro Focus COBOL?" to determine whether your product requires COBOL. A second article, "PeopleSoft Enterprise Frequently Asked Questions About PeopleSoft and the IBM COBOL Compiler," (My Oracle Support, Doc ID 1211907.1) covers similar information about the products from IBM.

*Additional tasks.* Review the discretionary tasks in the second part of the PeopleSoft PeopleTools installation guides and select those needed for your configuration. For example, the instructions for installing PeopleBooks are included as an appendix. PeopleSoft PeopleBooks and the My Oracle Support knowledge base also contain advanced and specialized information that you may be interested in for your configuration, but which is not needed for a basic installation.

*Oracle Secure Enterprise Search or Verity.* The software that is supported for searches depends upon which PeopleSoft application version you are running. The use of Verity software to carry out searches is supported for PeopleSoft applications with a version 9.1x or earlier. For PeopleSoft applications 9.2 or later, you must install and configure Oracle SES, and configure the PeopleSoft Search Framework. Using Verity is no longer supported beginning with PeopleSoft application version 9.2.

See *PeopleTools: Search Technology*, "PeopleSoft Search Framework Versus Verity Search Engine."



Installation Flow, Part 3

