PeopleSoft Financials and Supply Chain Management 9.2 (Update Image 58)

Installation

G53235-02
November 2026

PeopleSoft Financials and Supply Chain Management 9.2 (Update Image 58) Installation,

G53235-02

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Contents

About This Documentation

Understanding This Documentation i
Audience i
Typographical Conventions ii
Products iii
Related Information iv
Comments and Suggestions iv

1 Preparing for Installation

1.1 Understanding the Installation 1
1.2 Installing PeopleSoft PeopleTools and PeopleSoft Application Software 1
1.3 Reviewing the Demo Database Size 1
1.4 Using the Fluid User Interface 2

2 Setting Up the PeopleSoft Financials/Supply Chain Management Database

2.1 Setting Up Installation Defaults for the System Database 1
2.2 Deleting Summary Trees for the System Database 1
2.3 Setting Up the Database for the Chartfield Configuration Process 1
2.3.1 Understanding Database Requirements for the ChartField Configuration Process 1
2.3.2 Defining Settings for the ChartField Configuration Process 1
2.4 Accessing FSCM Applications from PeopleSoft Portal Solutions 2

3 Configuring Global Search Using PeopleSoft Search Framework

3.1 Understanding Configuring Global Search Using PeopleSoft Search Framework 1
3.2 Prerequisites 1
3.3 Defining New Roles for Global Search 2
3.4 Defining Search Group Display 3
3.4.1 Understanding Search Group Display 3
3.4.2 Adding the Search Group to the Home Page Search Context 3
3.5 Identifying FSCM Search Definitions for Attachments 4

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3.6 Deploying and Indexing Delivered Search Definitions 6
3.6.1 Deploying Indexes 6
3.6.2 Building an Index 7
3.7 Upgrading File Attachments 7

4 Configuring Real Time Indexing

4.1 Understanding Real Time Indexing 1
4.2 Reviewing Search Definitions for Real Time Indexing 1
4.3 Enabling Real Time Indexes 1

5 Configuring Materialized Views for Operational Metrics

5.1 Understanding Materialized Views 1
5.2 Enabling Materialized View 2
5.2.1 Change Properties 2
5.2.2 Creating Materialized View in App Designer 3
5.3 Maintaining Materialized Views 3
5.4 Analyzing the Tiles Used in Operation Metrics 5
5.4.1 Operation Metrics in Payables, Receivables and Billing 5
5.4.2 Using Operation Metrics in Payables 5
5.4.3 Using Operation Metrics in Receivables 5
5.4.4 Using Operation Metrics in Billing 6

6 Installing PeopleSoft 9.2 General Ledger

6.1 Prerequisites 1
6.2 Changing a URL Definition for General Ledger File Import (Optional) 1
6.3 Defining an Environmental Variable on a Process Scheduler Server 2

7 Installing and Setting Up Forms Processing for PeopleSoft 9.2 Grants

7.1 Understanding Forms Processing 1
7.2 Downloading the Forms from the Sponsor Web Sites 1
7.3 Setting Up the Forms URL Maintenance Area in PeopleSoft 2
7.4 Entering the Names of the PDF Templates (Optional) 2
7.5 Printing the Forms (Optional) 3
7.6 Viewing Reports 4

8 Installing PeopleSoft 9.2 Expenses

8.1 Configuring PeopleSoft Integration Broker 1
8.1.1 Understanding the PeopleSoft Integration Broker Configuration 1

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8.1.2 Setting Up Gateways 1
8.1.3 Activating Queue Definitions 1
8.1.4 Setting up Service and Handlers 2
8.1.5 Verifying the Message Channel Status 4
8.2 Configuring the Employee Portal Servlet URL 4

9 Installing PeopleSoft 9.2 Pay/Bill Management

9.1 Understanding PeopleSoft 9.2 Pay/Bill Management 1
9.2 Prerequisites 1
9.3 Verifying Integration Points 1
9.3.1 Understanding Integration Points Verification 1
9.3.2 Setting Up Node Definitions for Single Signon 2
9.3.3 Setting Up Portal Nodes 2
9.3.4 Setting Up Single Signon 2
9.3.5 Activating Queue Definitions 3
9.3.6 Setting Up the PeopleSoft System-Delivered Service Operations 5
9.4 Verifying the Installation Tables for PeopleSoft HCM and PeopleSoft FSCM 6
9.4.1 Verifying the Installation Table for PeopleSoft HCM 6
9.4.2 Verifying the Installation Table for PeopleSoft FSCM 6

10 Installing PeopleSoft 9.2 ESA and FSCM Portal Packs

10.1 Granting Access to Navigation Pages 1
10.2 Granting Access to Personalize the Portal Homepage 1
10.3 Enabling Pagelet Creation and Access with Portal Utilities 1

11 Defining a Server for File Attachments in PeopleSoft 9.2 Project Costing

11.1 Understanding File Attachment Storage 1
11.2 Setting Up File Attachment Storage on the Database 1
11.3 Setting Up File Attachment Storage on a File Server 1

12 Setting Up PeopleSoft 9.2 Staffing Front Office

12.1 Setting Up Document Attachments 1
12.1.1 Understanding Document Attachments 1
12.1.2 Setting Up the File Attachment Server 1
12.2 Setting Up the PeopleSoft Search Framework 2

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13 Installing PeopleSoft Maintenance Management 9.2 Work Order Attachment Print

13.1 Understanding PeopleSoft Work Order Attachment Print 1
13.2 Prerequisites 1
13.3 Verifying the URLs and the Installation Location 1
13.3.1 Modifying the Attachment Print Command URL 1
13.3.2 Modifying the Attachment Print Directory URL for an Alternate Download Holding Directory 2
13.4 Enabling the PeopleSoft Work Order Attachment Print Features 3

14 Integrating PeopleSoft 9.2 Asset Management and Physical Inventory Solutions

14.1 Understanding the Integration of PeopleSoft 9.2 Asset Management with Physical Inventory 1
14.2 Configuring the Inbound Nodes 1
14.3 Activating Service Operations 3
14.4 Running Message Channel 6
14.5 Activating the Domain for Asynchronous Messaging 7

15 Integrating PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems

15.1 Understanding the Integration of PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems 1
15.2 Reviewing Configuration Values for IT Asset Management 1
15.3 Configuring the Inbound Nodes 2
15.4 Activating Service Operations 4
15.5 Managing Queue Status 6
15.6 Activating the Domain for Asynchronous Messaging 7

16 Configuring eMail URLS in PeopleSoft SCM Applications

16.1 Configuring eMail URLs 1
16.1.1 Understanding eMail Configuration 1
16.1.2 Configuring eMail URLs for Item Loader Exceptions 1
16.1.3 Configuring eMail URLs for Supplier Facing Applications 2
16.1.4 Configuring eMail URLs for PeopleSoft eBill Payment 3
16.2 Setting Up Pagelets 4
16.2.1 Accessing Pagelets 4
16.2.2 Enabling Pagelet Creation and Access with Portal Utilities 5

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16.3 Granting Access to Navigation Pages 5

17 Setting Up PeopleSoft Supplier Relationship Management Applications

17.1 Reviewing the PeopleSoft 9.2 Supplier Contract Management Setup 1
17.2 Granting Security in PeopleSoft Fluid Requisition 1
17.2.1 Understanding PeopleSoft Fluid Requisition 1
17.2.2 Granting Access to Component Interfaces 2
17.2.3 Granting Access to Web Libraries (IScript Functions) 3
17.2.4 Granting Access to Users 5
17.2.5 Granting Access to Menu and Components 6
17.3 Setting Up the PeopleSoft Search Framework Search Engine in Fluid Requisition 10
17.3.1 Understanding PeopleSoft Search Framework 10
17.3.2 Indexing and Deploying Search Definitions 10
17.3.3 Application Searching (Global Search) Security 12
17.4 Installing OSNConnector for PeopleSoft eProcurement 13
17.4.1 Prerequisites 13
17.4.2 Setting Up WebLogic Server 13
17.4.3 Configure the Integration Gateway Properties 15
17.4.4 Configure the WebLogic Environment 17
17.4.5 Configuring the OSN Listening Connector Servlet 18
17.4.6 Setting Up the Gateway for Integration Broker 19
17.4.7 Troubleshooting OSNConnector Installation 20
17.5 Setting Up PeopleSoft G-Invoicing 20
17.5.1 Understanding PeopleSoft G-Invoicing 20
17.5.2 Configuring Integration Broker Gateway 21
17.5.3 Configuring REST Listening Connector 21
17.5.4 Activating Local Node in PeopleSoft 21
17.5.5 Creating External Node for GET 22
17.5.6 Creating External Node for POST 23

18 Configuring OpenSearch Dashboards

18.1 Understanding OpenSearch Dashboards 1
18.2 Prerequisites 1
18.3 Verifying the Search Definition Deployment 3
18.4 Deploying OpenSearch Dashboards 5
18.5 Reviewing the Dashboards 7

A Applying Common Installation Instructions

A.1 Setting Up Integration Gateways A-1

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A.2 Activating the Domain A-4
A.3 Setting Up Message Node Definitions A-4
A.4 Setting Up Portal Nodes A-6
A.4.1 Understanding Portal Node Set Up A-6
A.4.2 Setting Up Portal Nodes in PeopleSoft FSCM/HCM A-7

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About This Documentation

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 environment, including operating system, hardware, and RDBMS, and have the necessary skills, permissions, and access 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, Linux or UNIX

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

See PeopleSoft Information Portal,https://docs.oracle.com/cd/E52319_01/infoportal/training.html

Typographical Conventions

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

Convention	Description
`Monospace`	Indicates a PeopleCode program or other code, such as scripts that you run during the install. Monospace is also used for messages that you may receive during the install process.
Italics	Indicates field values, emphasis, and book-length publication titles. Italics is also used to refer to words as words or letters as letters, as in the following example: Enter the letter *O*.
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or page.
lower case	File or directory names are represented in lower case, unless they appear otherwise on the interface.
Menu, Page	A comma (,) between menu and page references indicates that the page exists on the menu. For example, “Select Use, Process Definitions” indicates that you can select the Process Definitions page from the Use menu.
Cross-references	Cross-references that begin with *See* refer you to additional documentation that will help you implement the task at hand. We highly recommend that you reference this documentation. Cross-references under the heading *See Also* refer you to additional documentation that has more information regarding the subject.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meaning.
⇒ (line-continuation arrow)	A line-continuation arrow inserted at the end of a line of code indicates that the line of code has been wrapped at the page margin. The code should be viewed or entered as a continuous line of code, without the line-continuation arrow.
Note: Note text.	Text that begins with *Note.* indicates information that you should pay particular attention to as you work with your PeopleSoft system.

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

Products

This documentation may refer to these products and product families:

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

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

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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 Help Center:

- 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 Oracle Help Center:

https://docs.oracle.com/en/applications/peoplesoft/index.html.

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.

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1

Preparing for Installation

1.1 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.

1.2 Installing PeopleSoft PeopleTools and PeopleSoft Application Software

PeopleSoft applications built on PeopleTools 8.63.04 are delivered as deployment packages (DPKs), which include the installation files for both the PeopleSoft 9.3 application and PeopleSoft PeopleTools 8.63.

To run PeopleSoft FSCM application, you must be on PeopleSoft PeopleTools 8.63.

For information on obtaining and installing PeopleSoft applications and to install PeopleSoft PeopleTools.

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

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, Article ID KA615.

See Oracle's PeopleTools 8.63 Installation and Implementation Home Page, My Oracle Support, Article ID KA1684.

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

1.3 Reviewing the Demo Database Size

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

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Platform	Approximate Database Size
Oracle — Unicode/ANSI	40 GB
Microsoft SQL Server — ANSI	9 GB
Microsoft SQL Server — Unicode	13 GB

1.4 Using the Fluid User Interface

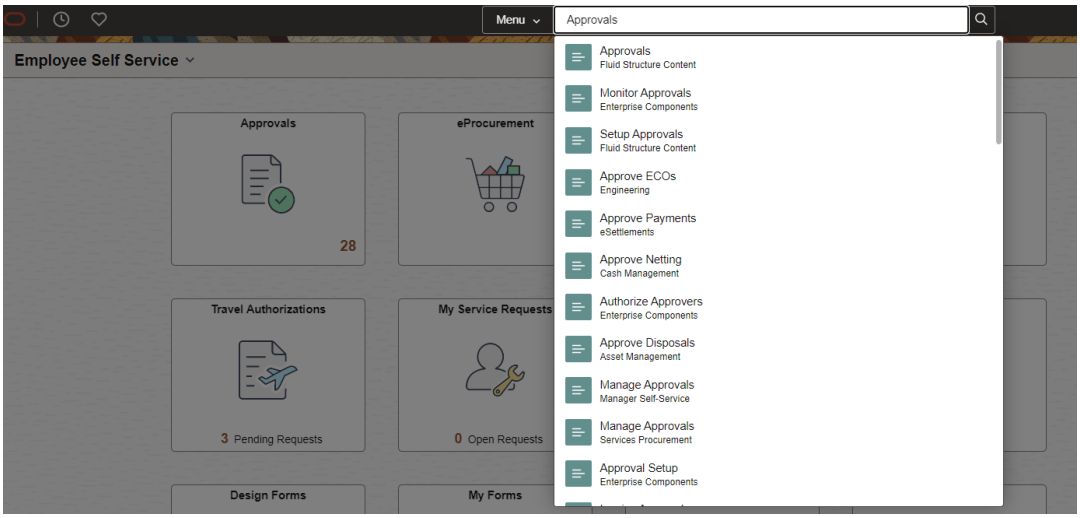
When you sign in to your PeopleSoft application, you may see the PeopleSoft Fluid User Interface by default.

In PeopleSoft Fluid User Interface, you can search menu items using global search or the Navigator (NavBar button).

To access menu items using Global Search:

1. Open the Global Search bar.
2. Click in the keyword input field to see search suggestions, as shown in the following example:

Figure 1-1 Global Search



See the product documentation for PeopleTools: Applications User's Guide, "Working with Search in Fluid Applications," for more information on global search.

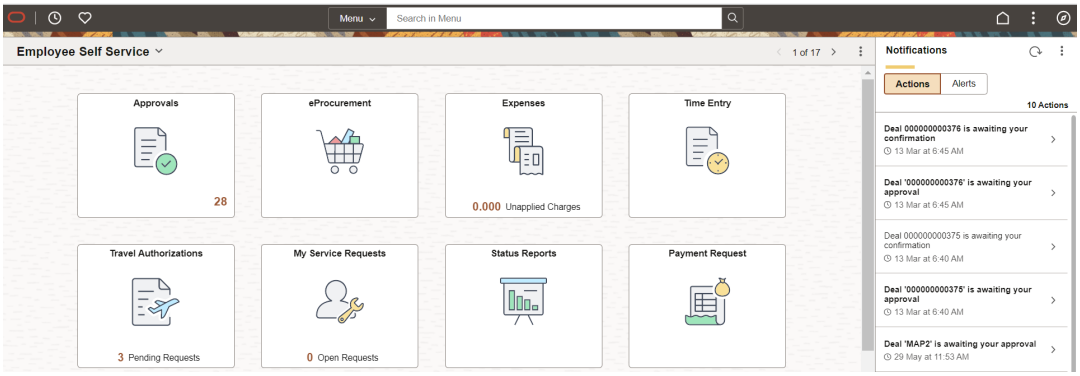
See the product documentation for PeopleTools: Applications User's Guide, "Working with Suggestions Search," for more information about search suggestions.

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.

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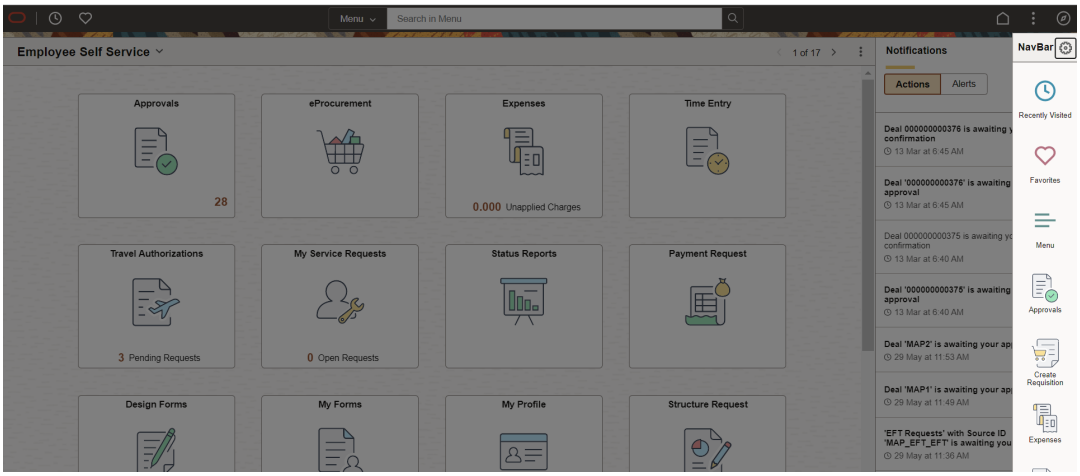
Figure 1-2 PeopleSoft Fluid User Interface home page



The Navigation bar (NavBar) side page appears.

2. Select (press) Navigator.

Figure 1-3 Navigator side page with PeopleSoft menu items

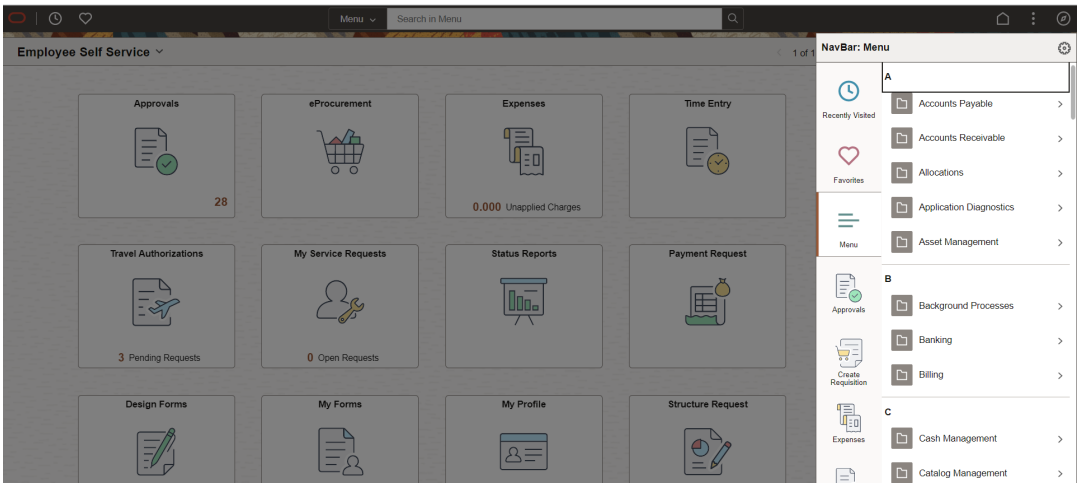


The menu structure appears.

3. Navigate to the desired item, such as Set Up Financials/Supply Chain or PeopleTools.

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Figure 1-4 Navigator side page with PeopleSoft menu items



Note that you can use component search to run searches against application data in the database using search keys that you can enter on the fluid component search page.

Using keyword search, you can run a free text search against indexed data in the PeopleSoft Search Framework search engine.

See the product documentation for PeopleTools: Applications User's Guide, "Working with Search in Fluid Applications," for more information on component search.

See Also

PeopleTools: Applications User's Guide, "Working With the PeopleSoft Fluid User Interface."

PeopleTools: Fluid User Interface Developer's Guide

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2

Setting Up the PeopleSoft Financials/Supply Chain Management Database

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.

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.

2.3 Setting Up the Database for the Chartfield Configuration Process

2.3.1 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.

2.3.2 Defining Settings for the ChartField Configuration Process

The ChartField configuration process settings differ based on the database selected.

Review the following details:

- Microsoft SQL Server- Oracle recommends no changes.
- Oracle

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- 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.

2.4 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.

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3

Configuring Global Search Using PeopleSoft Search Framework

3.1 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 OpenSearch as the Search Engine. PeopleSoft Integration Broker provides the interface between PeopleSoft Search Framework and OpenSearch to deploy PeopleSoft Search, build the indexes, and return the search results.

The components that you need to install and configure for search framework, analytics, and visualizations vary depending upon which PeopleTools release your update image is built on.

PeopleTools supports OpenSearch and OpenSearch Dashboards.

This documentation, and some labels in the user interface, are updated to reflect the transition to OpenSearch for search framework and OpenSearch Dashboards for PeopleSoft Insights. Some of the examples you see in this documentation may not reflect what you see in your environment.

> **Important**
>
> There are deployment and sizing considerations which should be determined prior to implementation of search. Review the document *PeopleSoft Search and Insights Home Page* (Article ID: KA592) on My Oracle Support for more information. This page provides information concerning configuration of the OpenSearch 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.*

3.2 Prerequisites

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

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> **Important**
>
> You should *only* perform these steps if you have completed the tasks discussed in PeopleSoft Deployment Packages Installation for Search Components (PeopleSoft PeopleTools 8.63), chapter" Integrating OpenSearch with the PeopleSoft Environment," which is available in PeopleSoft Search and Insights Home Page (Article ID: KA592) on My Oracle Support.

See Also

PeopleTools: PeopleSoft Search Technology

3.3 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
Maintenance Management	Maintenance Management	EPSR1110

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.

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- 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
- Insights Administrator — required for any user who will setup the Insights dashboard.

See *PeopleTools: PeopleSoft Search Technology.*

3.4 Defining Search Group Display

3.4.1 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.

3.4.2 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:

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

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Sequence	Search Category Name	Description
15	PTSF_INSIGHTS	Index for imported and deployed dashboards

4. Click Save.

After adding the search group, verify the Portal node in the PeopleSoft FSCM environment.

See "Appendix: Applying Common Installation Instructions, "Setting Up Portal Nodes.

3.5 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
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.

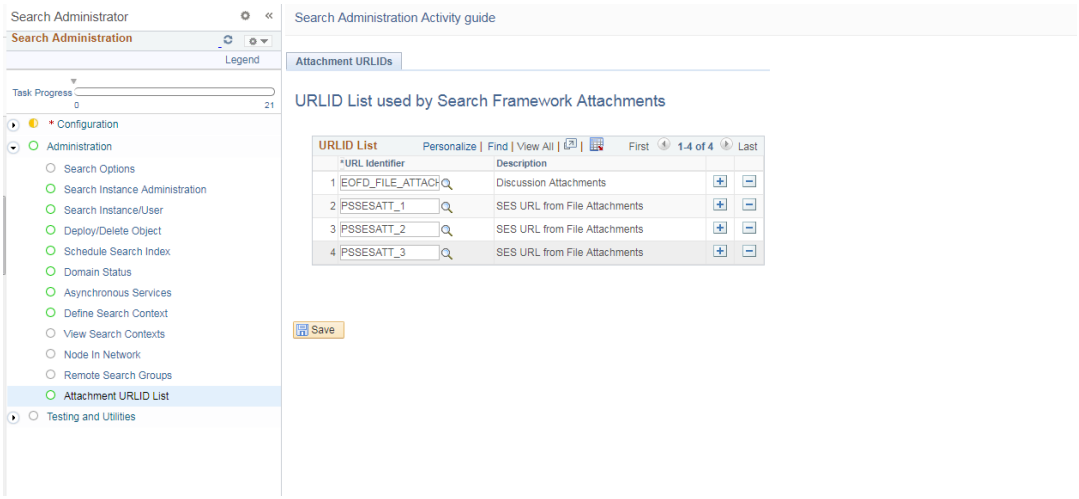
To verify:

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

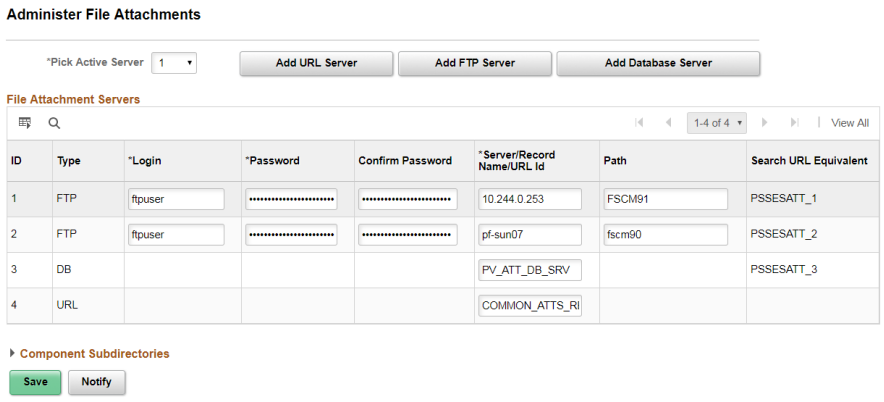
   On the Search Administration section, click Administration, and select the Attachment URLID List option to view the Attachments URLIDs page, as shown in the following example:

Figure 3-1 Attachments URLIDs List page



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

Figure 3-2 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.

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

3.6 Deploying and Indexing Delivered Search Definitions

3.6.1 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.

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.

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> **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."

3.6.2 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.

3.7 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

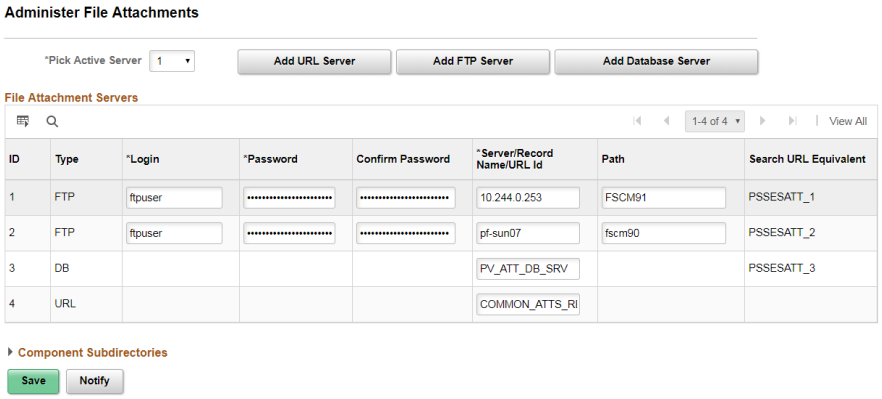
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corresponding URLs are automatically set up in PeopleSoft PeopleTools. You need to verify that the file attachments for FSCM are set up.

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:

Figure 3-3 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.

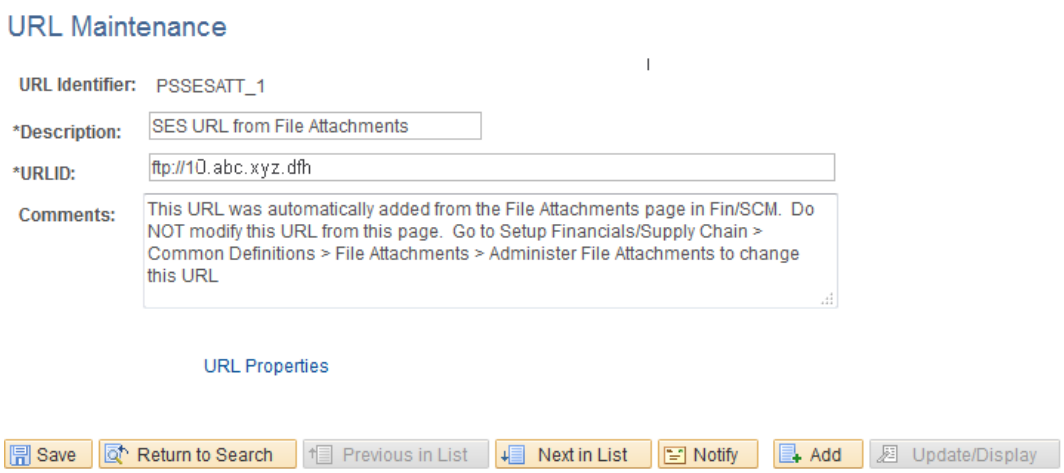
> **Note**
>
> The Search URL Equivalent column is populated with the required URL values.

2. Select PeopleTools, Utilities, Administration, Maintain 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:

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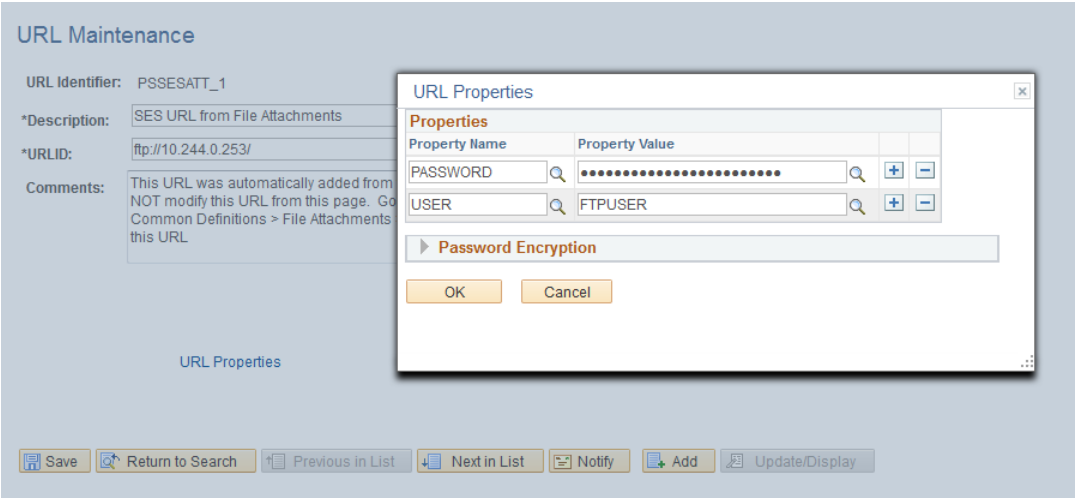
Figure 3-4 URL Maintenance page



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

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

Figure 3-5 URL Properties window

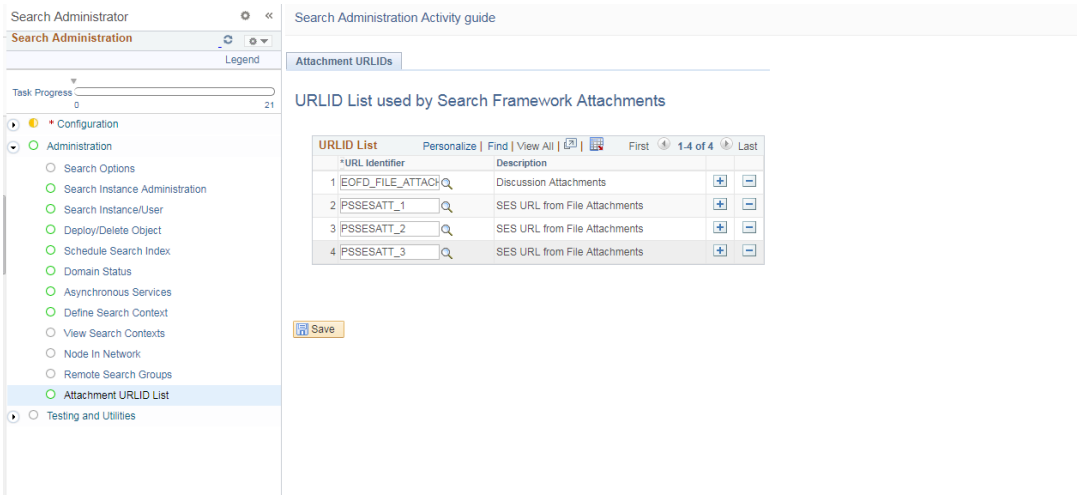


3. Select PeopleTools, Search Framework, Search Admin Activity Guide.

   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:

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Figure 3-6 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.

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4

Configuring Real Time Indexing

4.1 Understanding Real Time Indexing

This section details how to configure real time indexing for application searches for FSCM.

Real Time Indexing (RTI) uses DirectTransfer methods to transmit search data directly from PeopleSoft batch servers to search engine.

4.2 Reviewing Search Definitions for Real Time Indexing

PeopleSoft certifies existing search definitions that you can implement for Real Time Indexing (RTI). PeopleSoft Applications Development plans to certify more search definitions for RTI in future images.

RTI can be used on certified search definitions as long as the minimum PeopleTools release is in effect for the respective Update Image.

See the product documentation for PeopleSoft FSCM: Application Fundamentals, “PeopleSoft Search for Financials and Supply Chain Management,” Understanding Real Time Indexing in FSCM, for the current list of supported indexes.

For the list of excluded indexes,

See the product documentation for PeopleSoft FSCM: Application Fundamentals, “PeopleSoft Search for Financials and Supply Chain Management,” Understanding Real Time Indexing in FSCM, Search Definitions Excluded from Real Time Indexing.

If you are on the minimum PeopleTools release and want to locate application updates for RTI, use the following tracking group to pull all of the necessary bugs into a change package for easy deployment:

Tracking Group Name	Value
PeopleTools Features	Real Time Indexing for 8.63 and higher

> **Note**
>
> PeopleSoft Applications does not support enabling non-certified search definitions for RTI.

4.3 Enabling Real Time Indexes

To enable Real Time Indexes:

1. Perform a full or incremental build of the search definitions that you will enable. This allows a baseline index for RTI to add records.

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2. Enable RTI on the search definition using the Configure Real Time Indexing page (Select PeopleTools, Search Framework, Real Time Indexing, Configure Real Time Indexing).
   a. Enter the search definition in the filter box.
   b. Select the row containing the correct search definition.
   c. On the next page, select the Enable check box and Save.
3. Download the trigger SQL for your database environment using the Trigger SQL link.

   The platforms MSS and Oracle are supported.

> **Note**
>
> When you click the link, trigger SQL is generated for each supported database. Click Cancel if you do not have this database and the next database SQL is generated.

4. Provide the trigger to your database administrator to apply to the database and have them bounce all Process Schedulers.

> **Important**
>
> Any time a change is made to the RTI configuration on the Configure Real Time indexing page or in the PeopleCode in the application class, whether or not a new trigger is generated and applied, the Process Scheduler must be restarted. If you do not restart the Process Scheduler, Real Time Indexing may not pick up the changes and could fail to index your data.

For additional information about configuring Real Time Indexing,

See PeopleTools, Development Tools, Search Technology, Administering PeopleSoft Search Framework, Using Real Time Indexing.

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5

Configuring Materialized Views for Operational Metrics

5.1 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.

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.
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.

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5.2 Enabling Materialized View

> **Note**
>
> The materialized views are disabled by default.

This section discussed the tasks to enable materialized views.

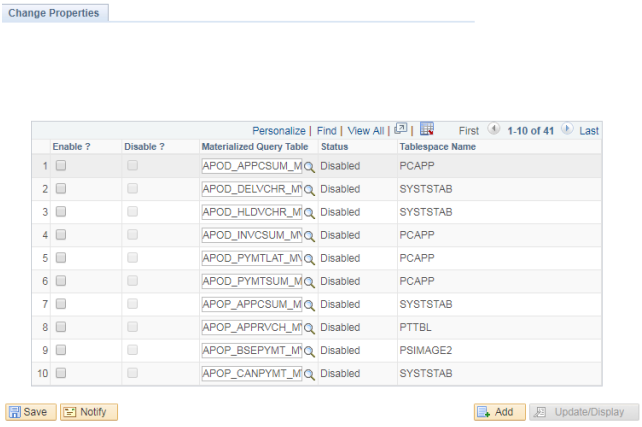
5.2.1 Change Properties

To change properties:

Navigate to PeopleTools, Utilities, Administration, Materialized Views, Enable Materialized Views.

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

Figure 5-1 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,

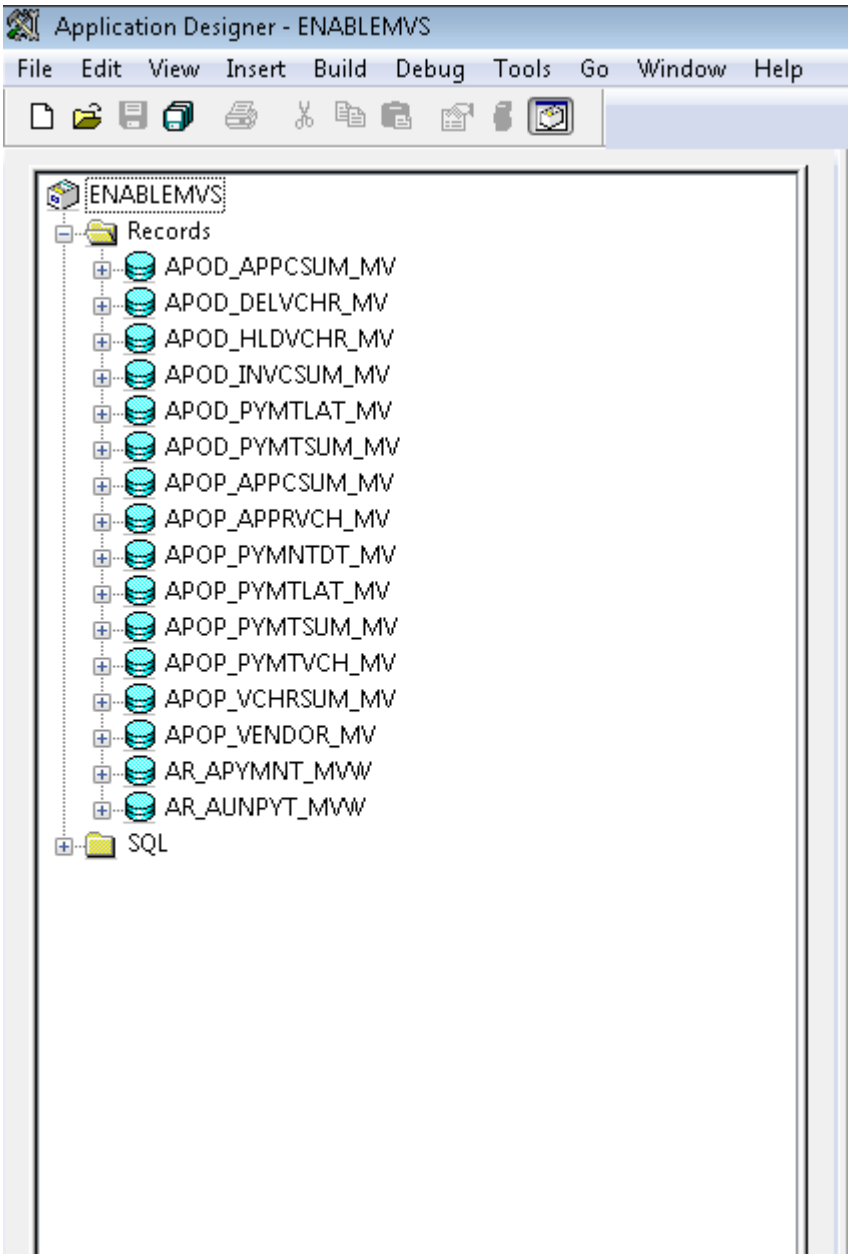
See PeopleSoft FSCM: Supply Chain Management, "Supply Relationship Management," Using Operation Metrics.

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5.2.2 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.

Figure 5-2 Application Designer: All Views



5.3 Maintaining Materialized Views

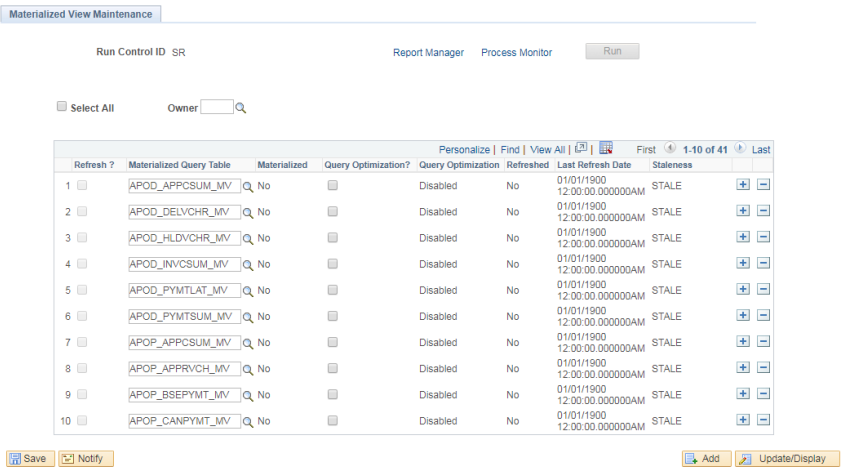
For ongoing maintenance of materialized views, administrators can use the Materialized View Maintenance page (PTMAT_MAINT). Administrators must have the Materialized View

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Administrator role and permission list to access this page. Access the Materialized View Maintenance run control page.

Navigate to PeopleTools, Utilities, Administration, Materialized Views, Maintain Materialized Views.

Figure 5-3 Materialized View Maintenance

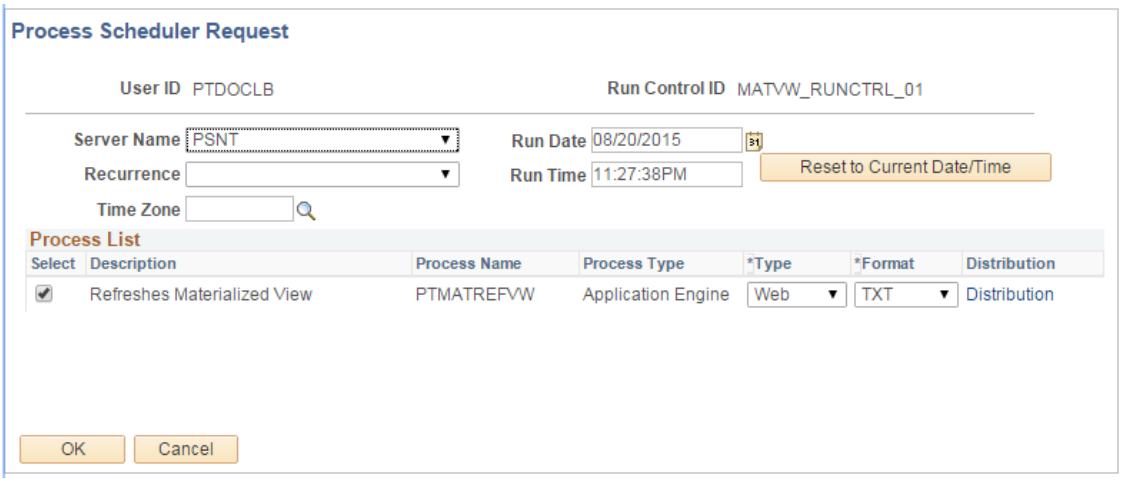


This page contains a grid that is populated with a list of the records in the materialized views table, *PSPTMATVWDEFN* .

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.

Figure 5-4 Process Scheduler Request page



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5.4 Analyzing the Tiles Used in Operation Metrics

5.4.1 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.

5.4.2 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. Select 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.

5.4.3 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. Select Fluid Home, Employee Self Service, Credit to Cash Operations.

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> **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.

5.4.4 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.

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6

Installing PeopleSoft 9.2 General Ledger

6.1 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)

6.2 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, Maintain 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

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6.3 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 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.

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7

Installing and Setting Up Forms Processing for PeopleSoft 9.2 Grants

7.1 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.

7.2 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.

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- 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.

7.3 Setting Up the Forms URL Maintenance Area in PeopleSoft

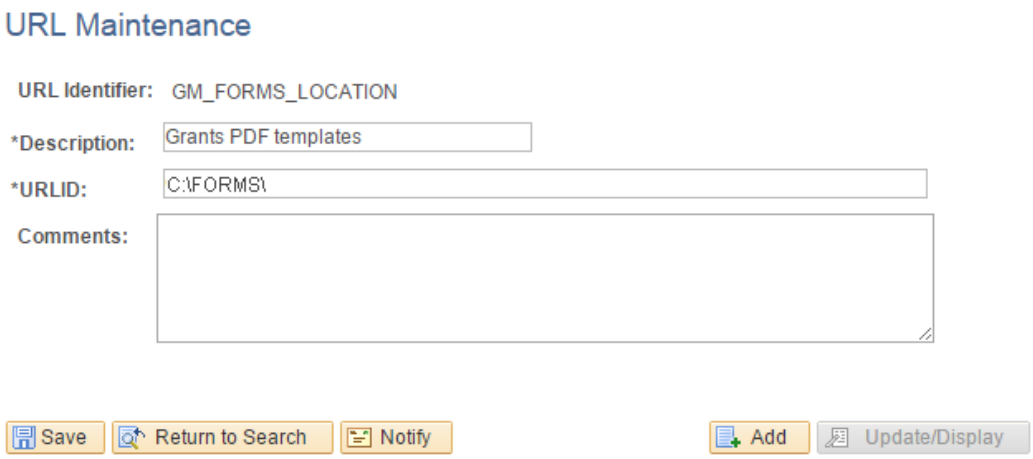
In this section you will set up the Forms URL Maintenance Area.

To set up the Forms URL Maintenance Area:

1. Select PeopleTools, Utilities, Administration, Maintain 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:

Figure 7-1 URL Maintenance page



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

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

7.4 Entering the Names of the PDF Templates (Optional)

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

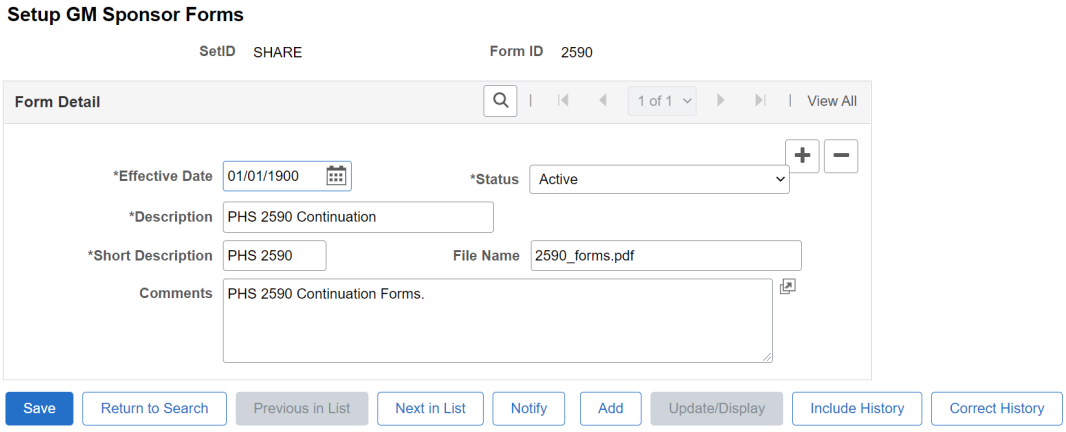
To enter the PDF template names:

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

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

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Figure 7-2 Setup GM Sponsor Forms page



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

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

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

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

7.5 Printing the Forms (Optional)

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

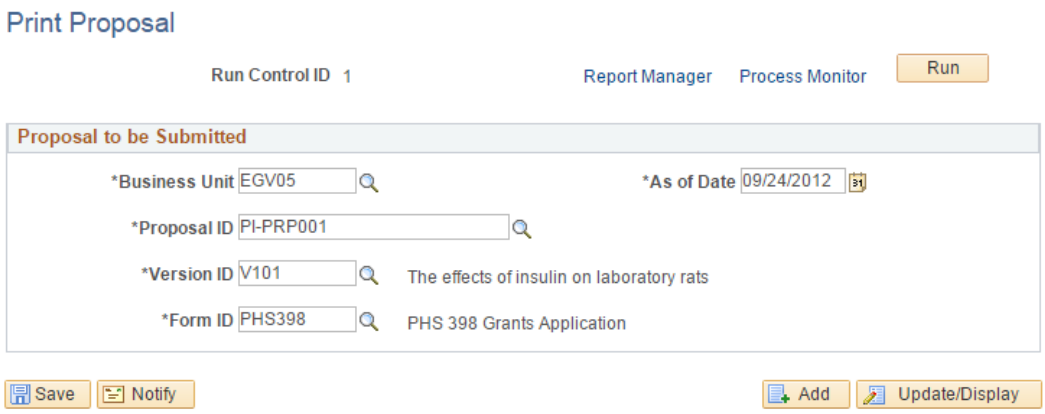
To print the forms:

1. Select Grants, Proposal, Print Proposal.

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

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Figure 7-3 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.

7.6 Viewing Reports

You need Acrobat Reader 5.0 or higher to view reports.

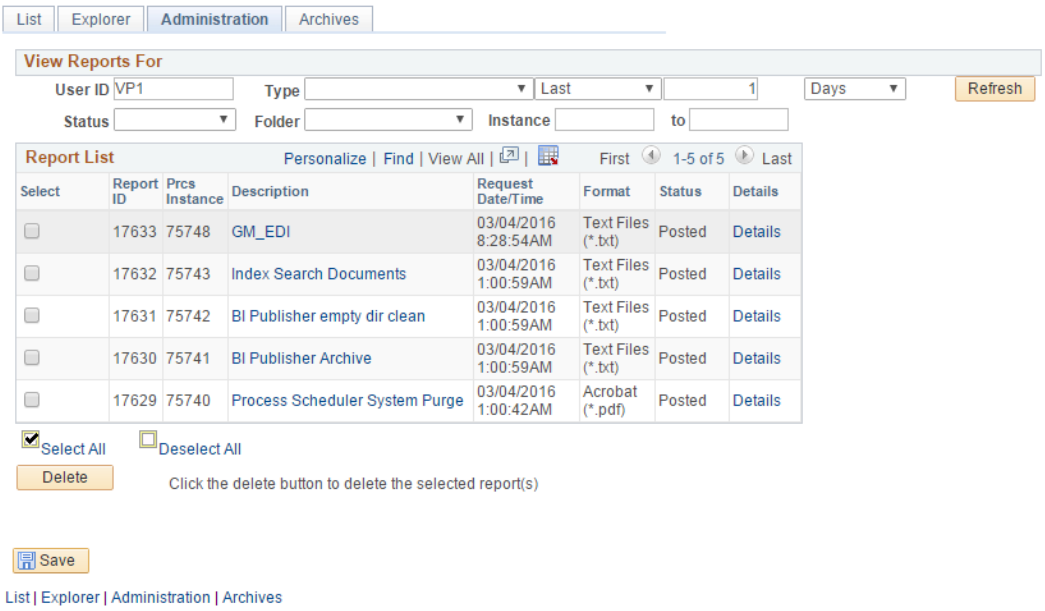
To view reports:

1. Select Reporting Tools, Report Manager, Administration.

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

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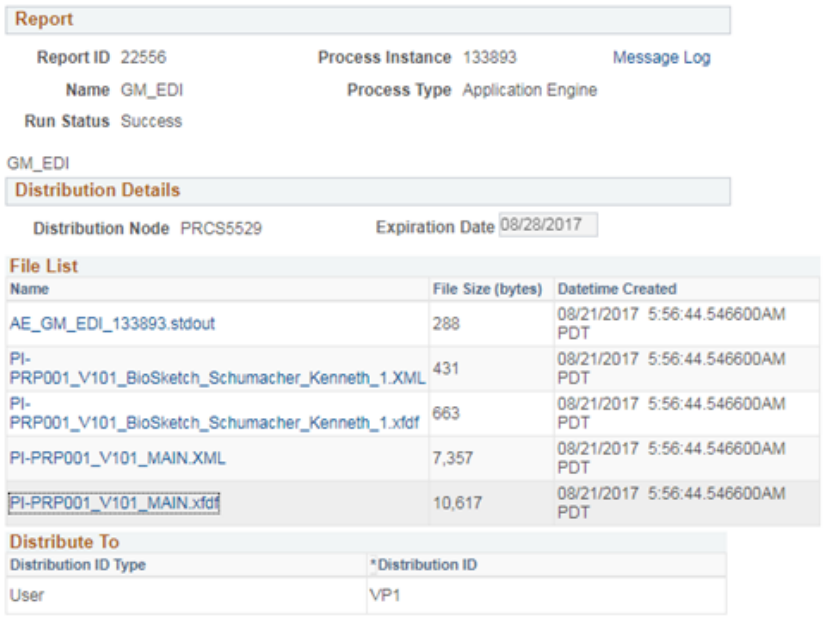
Figure 7-4 Report Manager page- Administration tab



2. On the Report Manager page- Administration tab, locate your process instance (the report description is GM_EDI).
3. Click the Details link in the GM_EDI row to view a list of the files that relate to the proposal.

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

Figure 7-5 Report Detail page



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

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5. After you download the file, double-click the local file to open and print.

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8

Installing PeopleSoft 9.2 Expenses

8.1 Configuring PeopleSoft Integration Broker

8.1.1 Understanding the PeopleSoft Integration Broker Configuration

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

8.1.2 Setting Up Gateways

To set up the local gateway and load balancer:

1. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions.
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.

8.1.3 Activating Queue Definitions

You activate the queue definitions.

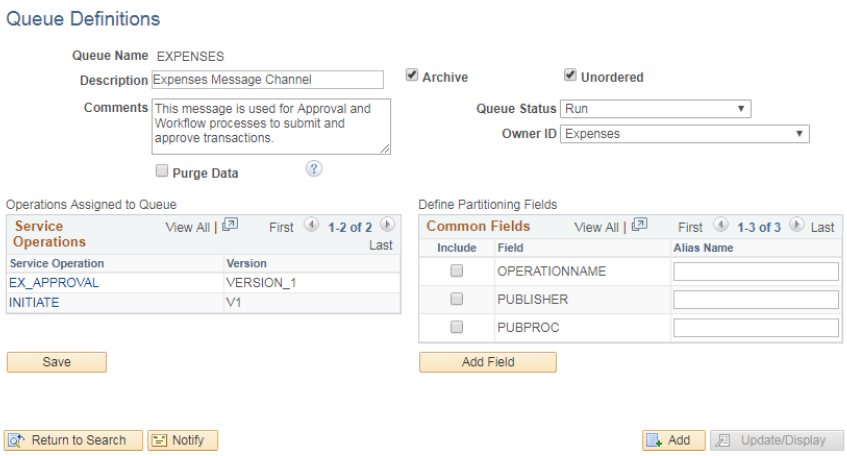
To activate:

1. Select PeopleTools, Integration Broker, Integration Setup, Queue Definitions.
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:

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Figure 8-1 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.

8.1.4 Setting up Service and Handlers

You set up the service and handlers.

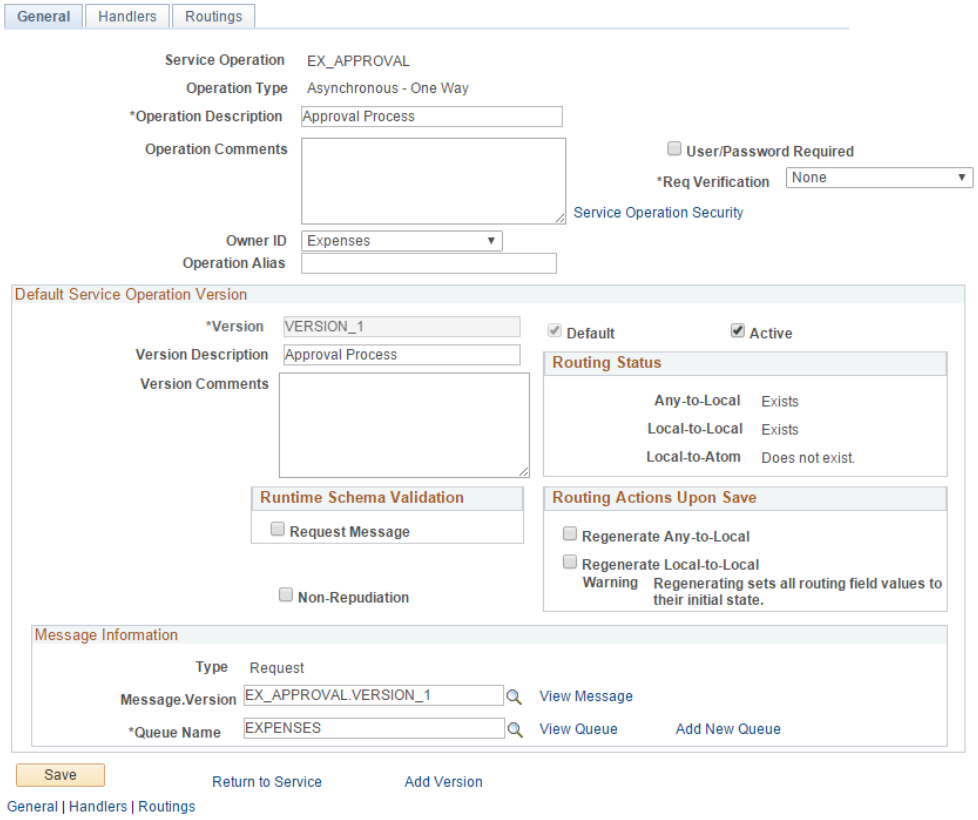
To set up service and handler:

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

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

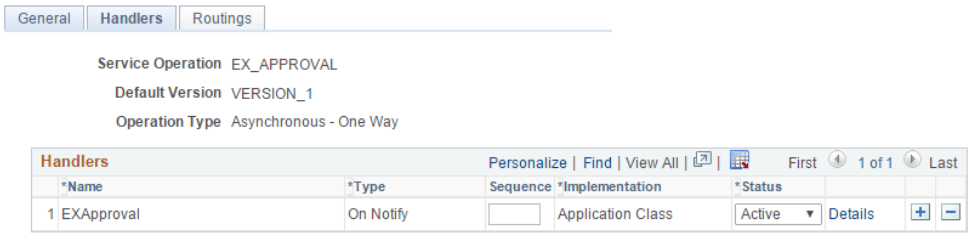
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Figure 8-2 Service Operations-General page



3. On the General page, in the Default Service Operation Version group box, select the Active check box.
4. Click Save.
5. Select the Handlers tab to access the Handlers page, as shown in the following example:

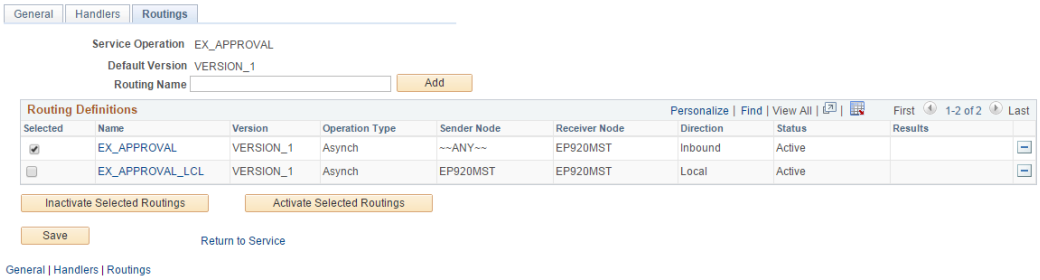
Figure 8-3 Service Operations - Handlers page



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:

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Figure 8-4 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.

8.1.5 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:

Figure 8-5 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.

8.2 Configuring the Employee Portal Servlet URL

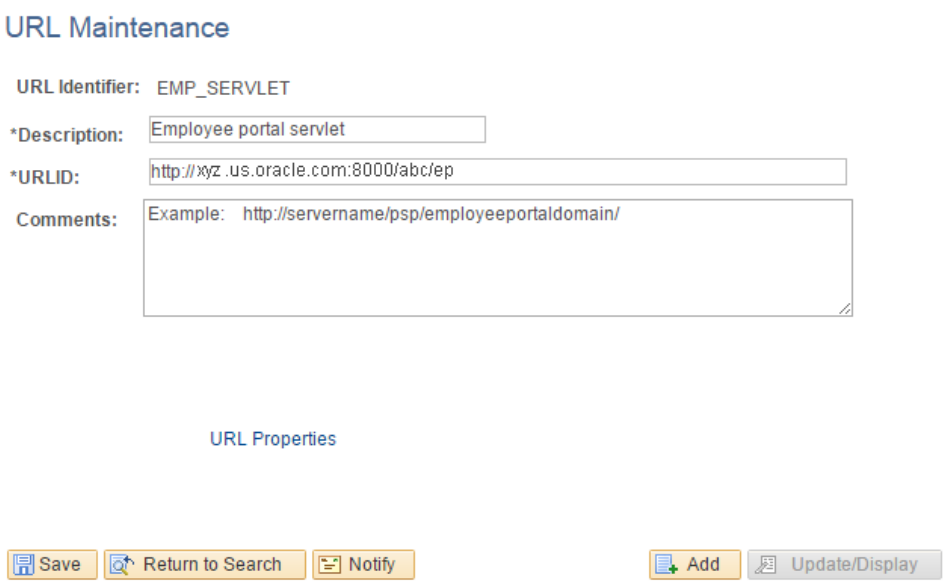
To configure the URL for the Employee Portal Servlet (EMP_SERVLET):

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1. Select PeopleTools, Utilities, Administration, Maintain 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:

Figure 8-6 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.

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9

Installing PeopleSoft 9.2 Pay/Bill Management

9.1 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.

9.2 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.

9.3 Verifying Integration Points

9.3.1 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.

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

9.3.2 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.

9.3.3 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.

9.3.4 Setting Up Single Signon

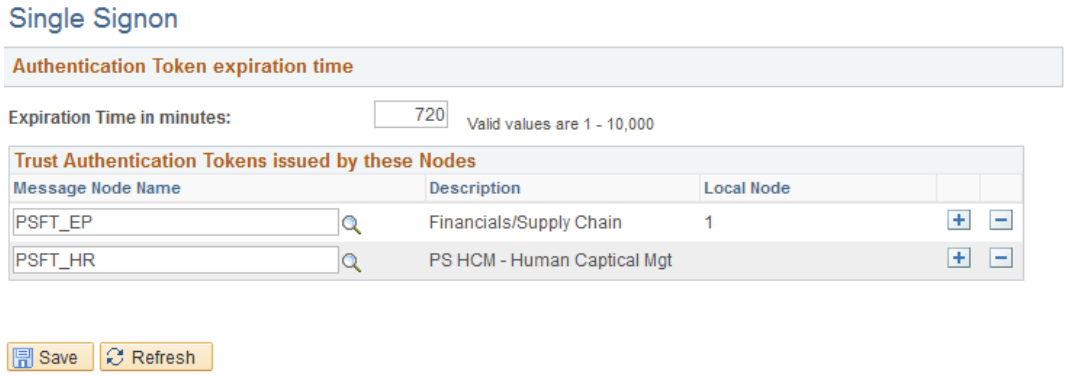
Setting Up Single Signon in PeopleSoft FSCM

To verify Single Signon in the PeopleSoft FSCM environment:

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

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

Figure 9-1 Single Signon page



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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, PeopleSoft 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.

9.3.5 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
```


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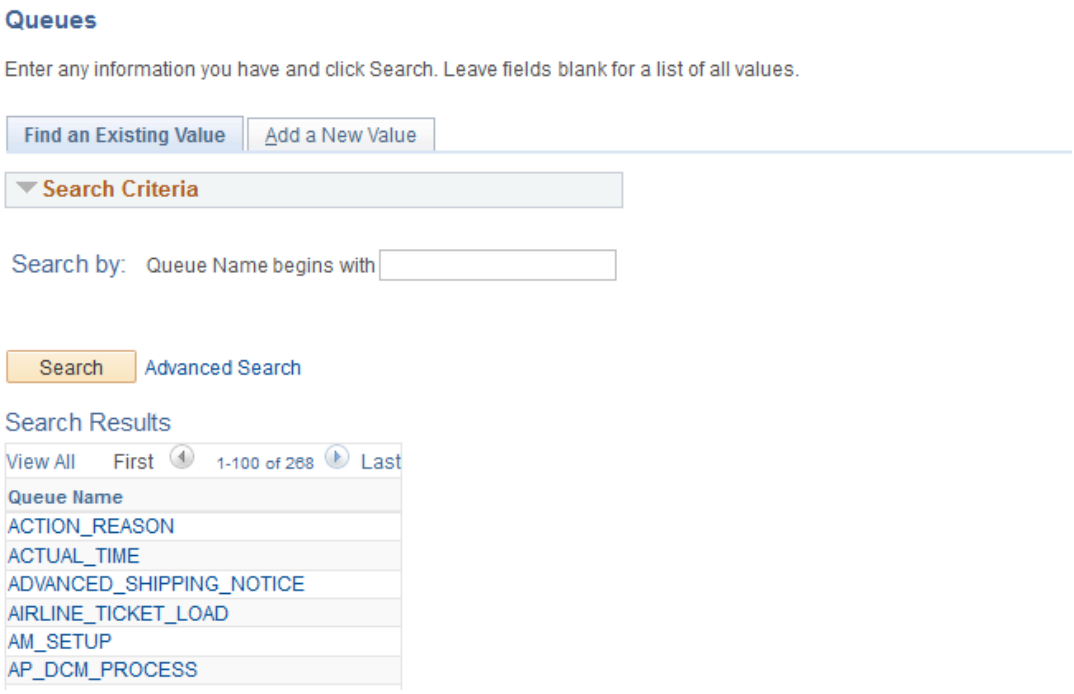
Activating Queue Definitions in PeopleSoft FSCM

To activate queue definitions in the PeopleSoft FSCM environment:

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

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

Figure 9-2 Queue Search Page

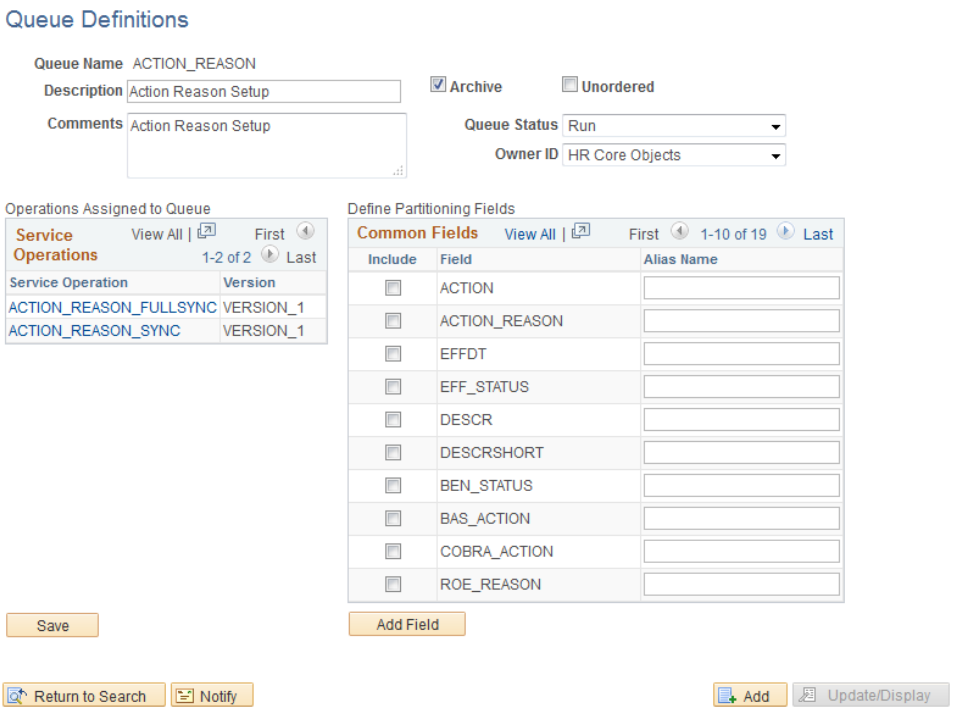


2. On the Queues search page, search for and select the queue name *ACTION_REASON*.

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

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Figure 9-3 Queue Definitions page



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

Activating Queue Definitions in PeopleSoft HCM

To activate queue definitions in the PeopleSoft HCM environment:

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

9.3.6 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."

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9.4 Verifying the Installation Tables for PeopleSoft HCM and PeopleSoft FSCM

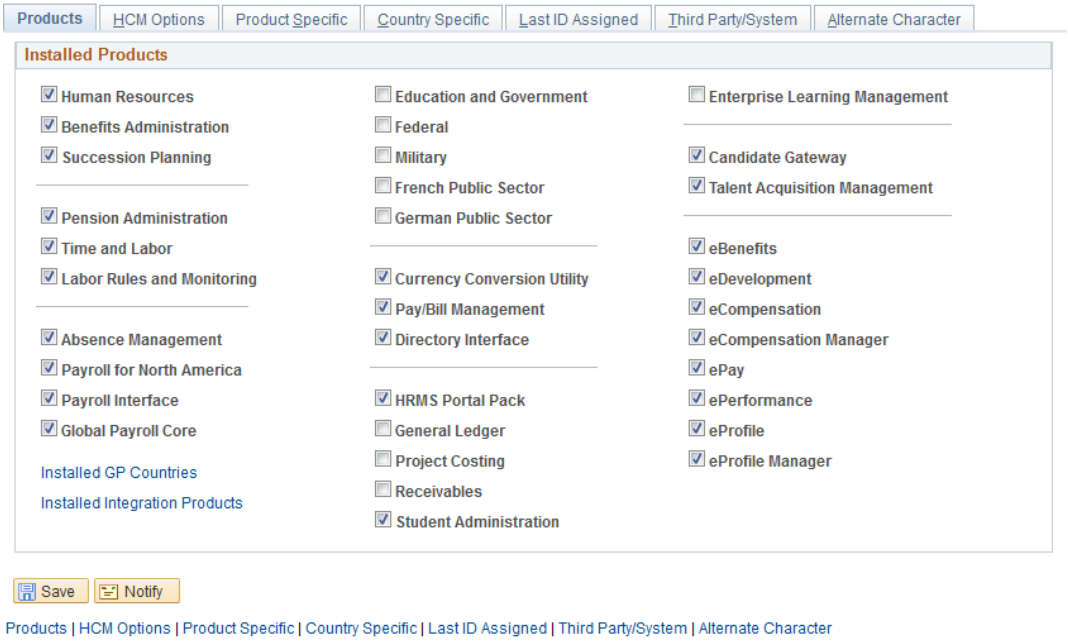
9.4.1 Verifying the Installation Table for PeopleSoft HCM

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:

Figure 9-4 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.

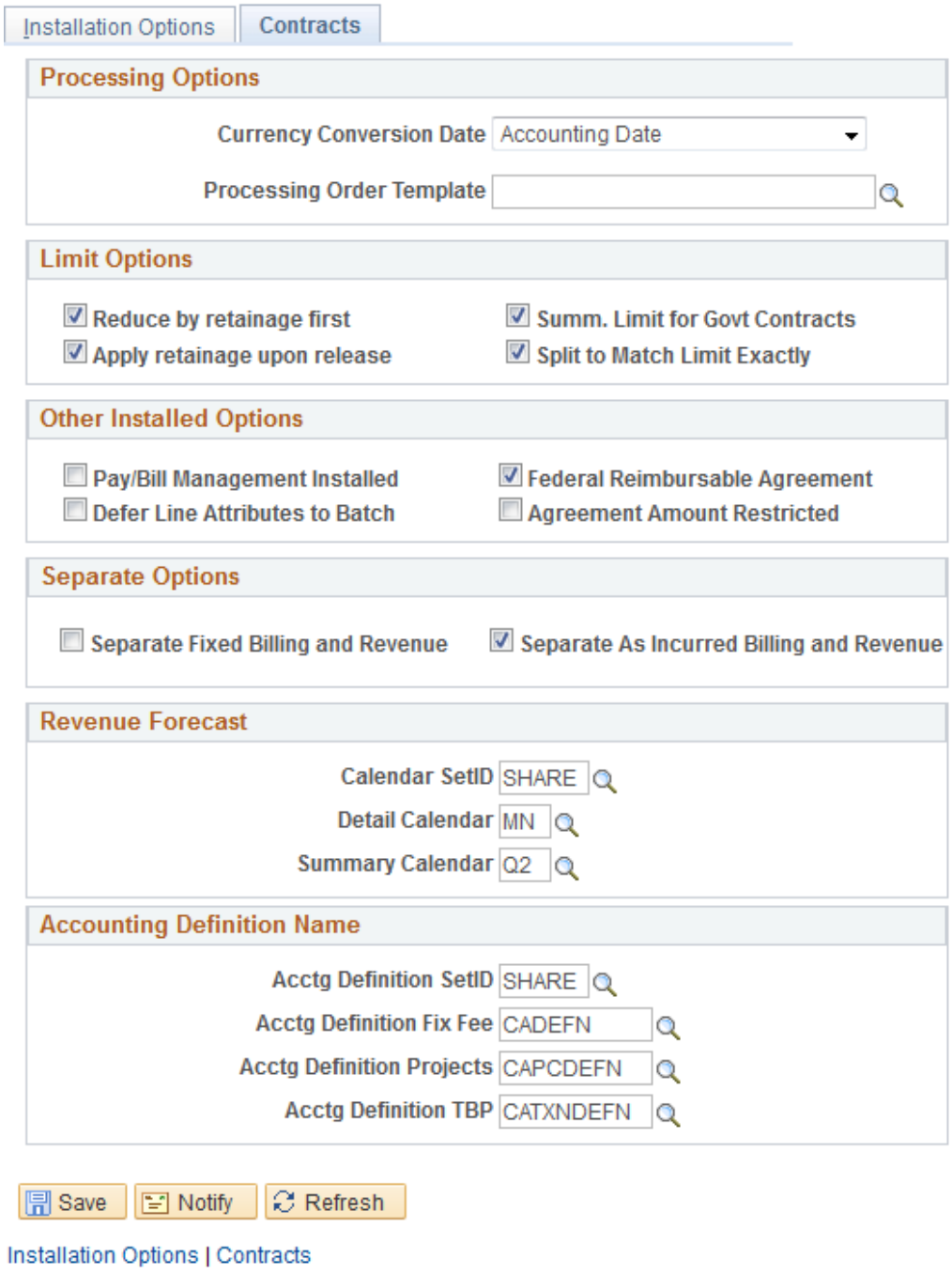
9.4.2 Verifying the Installation Table for PeopleSoft FSCM

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:

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Figure 9-5 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.

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10

Installing PeopleSoft 9.2 ESA and FSCM Portal Packs

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.

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.

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.

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

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11

Defining a Server for File Attachments in PeopleSoft 9.2 Project Costing

11.1 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.

11.2 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.

11.3 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, Maintain URLs.
3. On the URLs search page, search for and select the URL *PC_PROJECTS_DOC_ATTACHMENT*.

> **Note**
>
> PeopleSoft Project Costing delivers this URL.

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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.

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12

Setting Up PeopleSoft 9.2 Staffing Front Office

12.1 Setting Up Document Attachments

12.1.1 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.

12.1.2 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 desupported and should only be used for legacy attachments. Use URL servers which can be defined as *record://, https://, sftp:// or ftps://*.

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.

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> **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.

12.2 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 Search Objects.

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.

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13

Installing PeopleSoft Maintenance Management 9.2 Work Order Attachment Print

13.1 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.

13.2 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 8.63 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.

13.3 Verifying the URLs and the Installation Location

13.3.1 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

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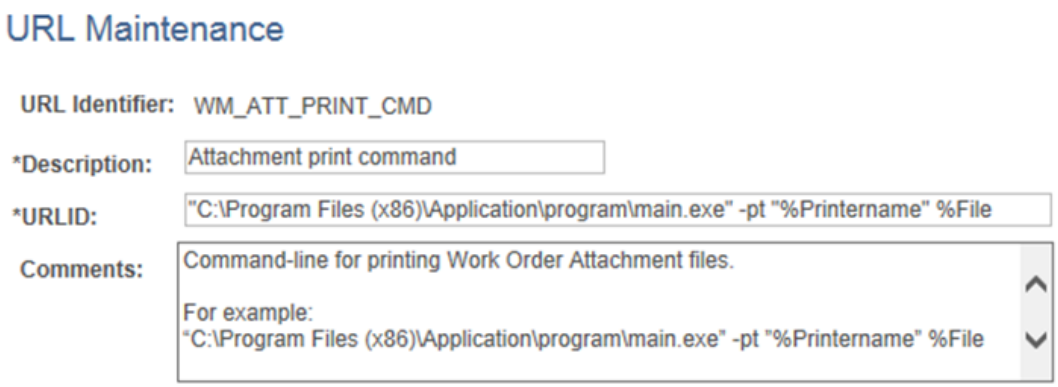
subdirectory that contains the majority of the additional component application's binary executables.

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

1. Select PeopleTools, Utilities, Administration, Maintain URLs.

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

Figure 13-1 URL Maintenance page - Attachment print command



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

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

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

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

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

13.3.2 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*

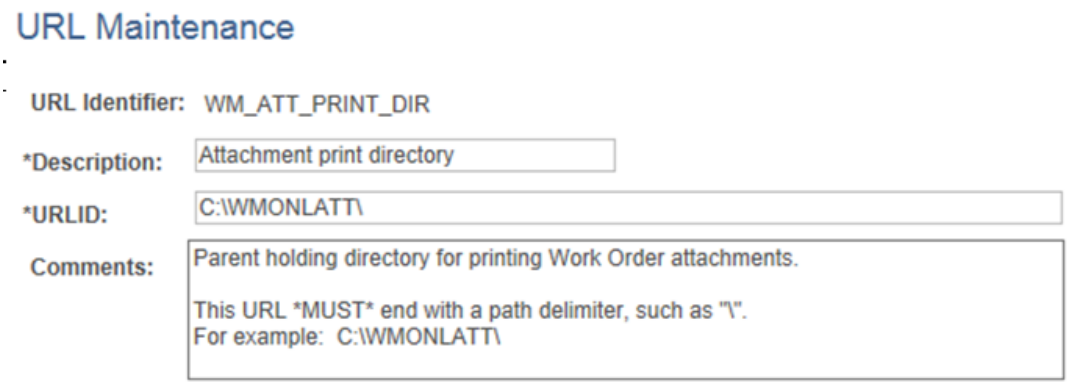
To use a different temporary download holding directory on your server:

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1. Select PeopleTools, Utilities, Administration, Maintain URLs.

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

Figure 13-2 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.

13.4 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.

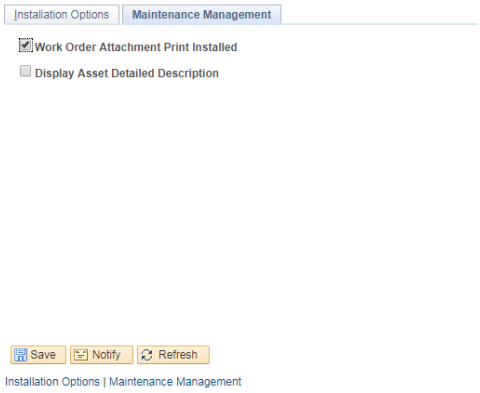
To enable the Print Attachments feature:

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:

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Figure 13-3 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.

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14

Integrating PeopleSoft 9.2 Asset Management and Physical Inventory Solutions

14.1 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.

14.2 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.

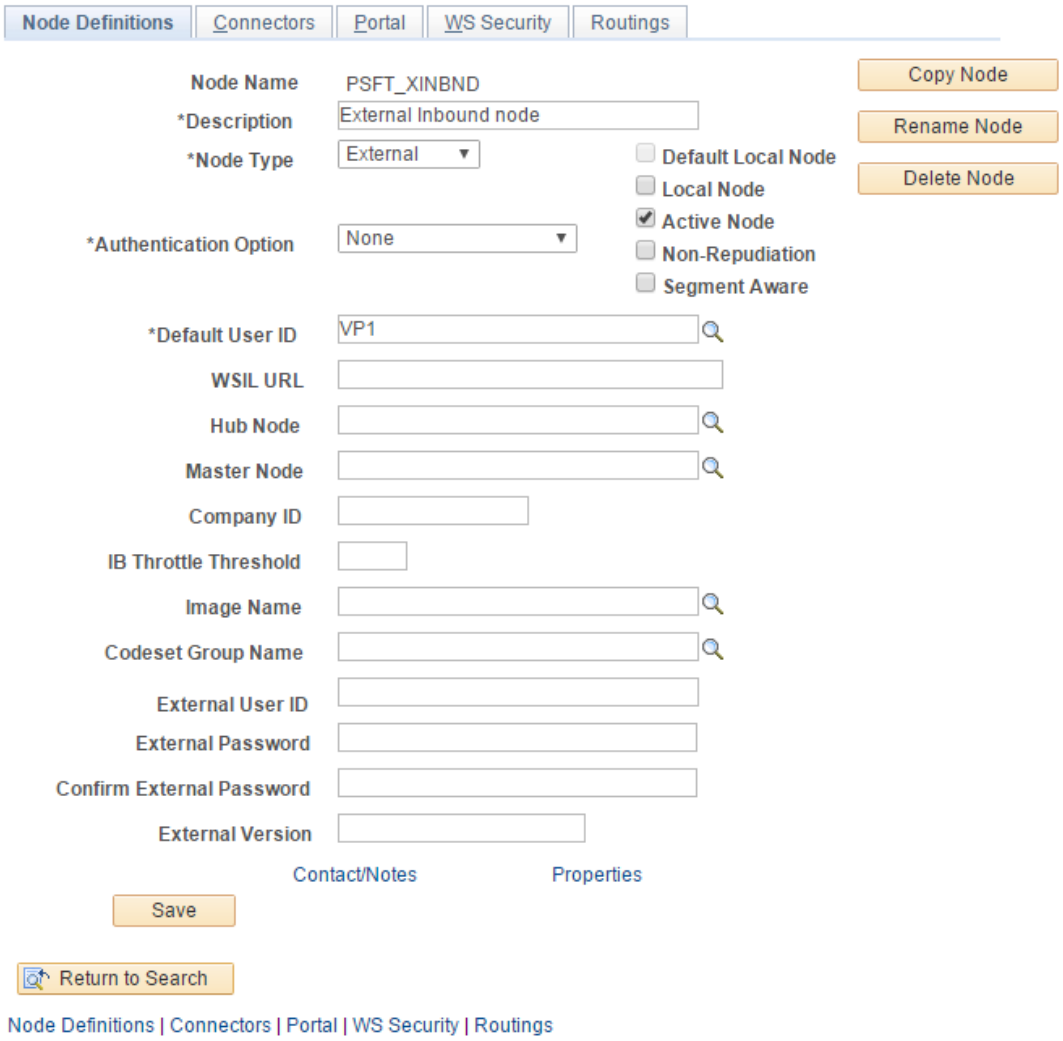
To configure the inbound nodes:

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

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

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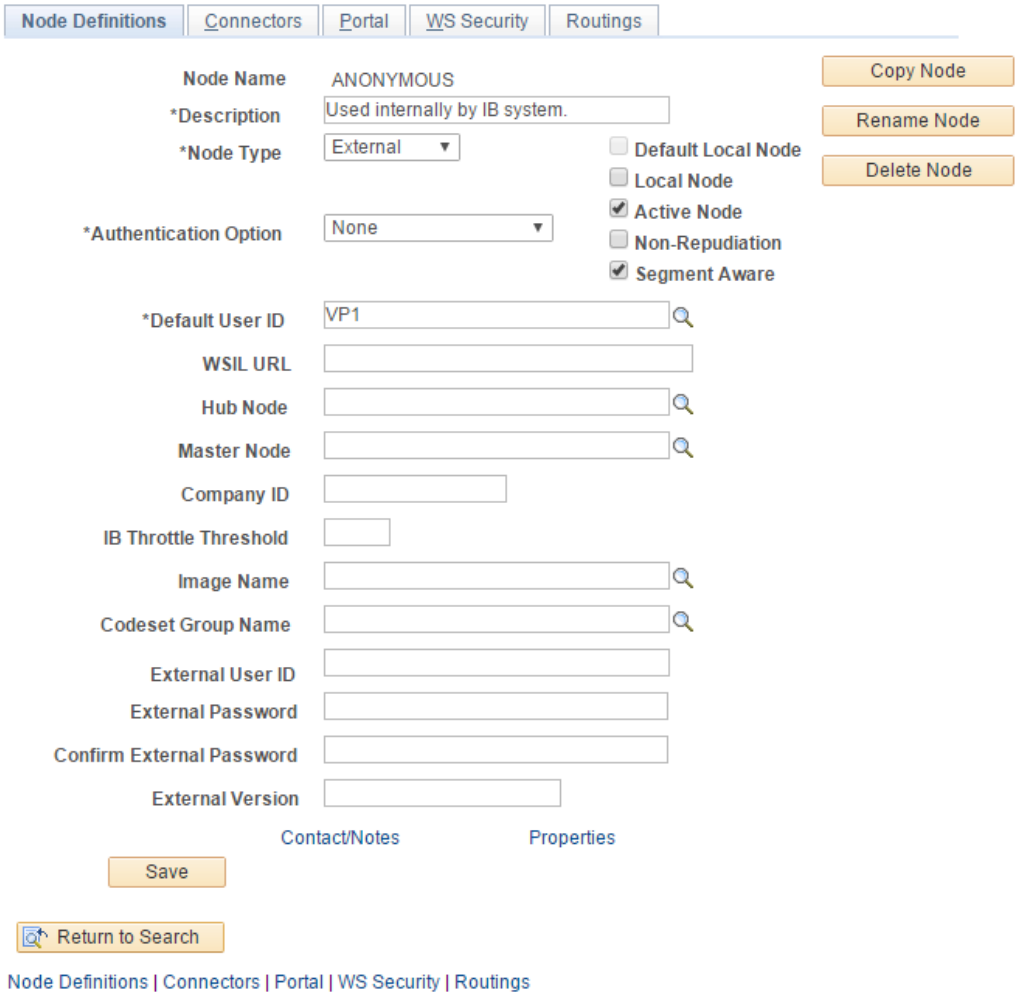
Figure 14-1 Node Definitions - PSFT_XINBND page



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

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Figure 14-2 Node Definitions - Anonymous page



8. Click Save.

14.3 Activating Service Operations

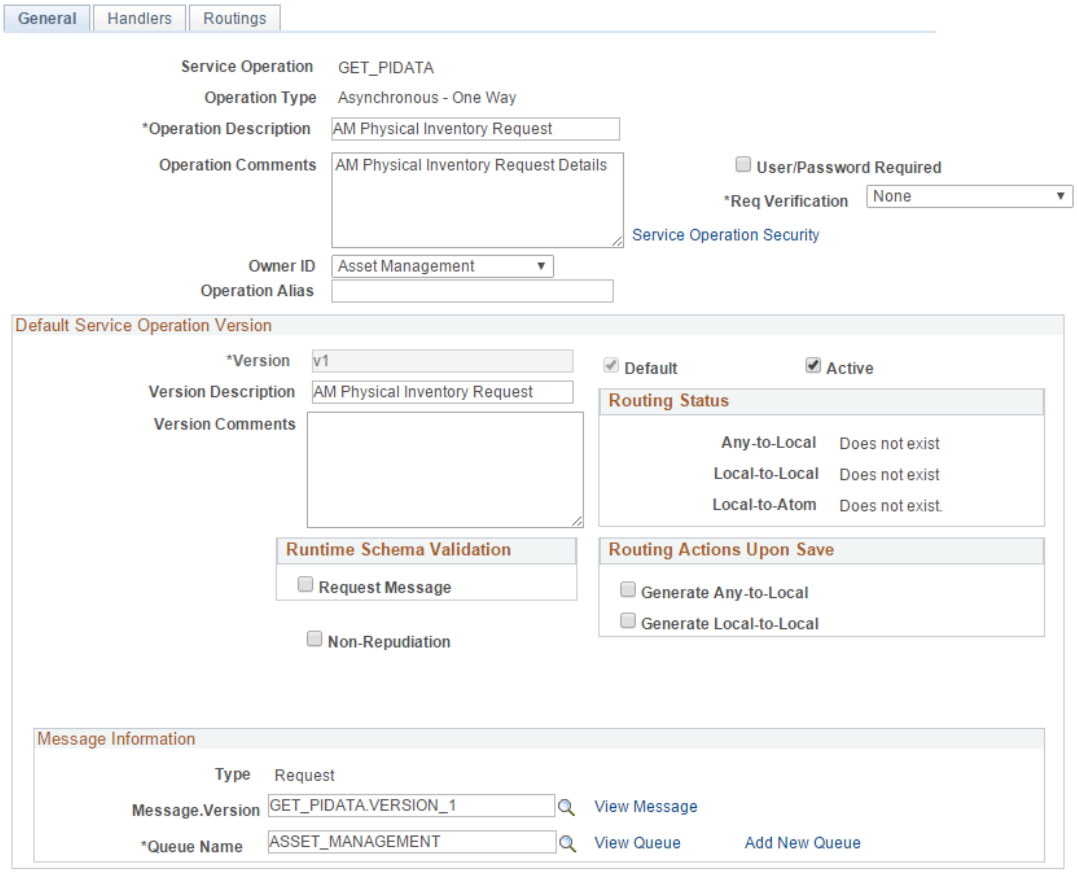
To activate service operations:

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

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

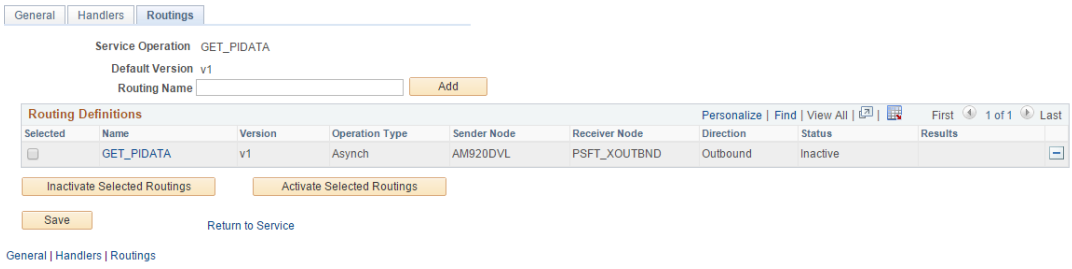
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Figure 14-3 Service Operations - General page



3. On the General page, select the Active check box, and then click Save.
4. On the Save Message dialog box, click OK.
5. Select the Routings tab to access the Routings page, as shown in the following example:

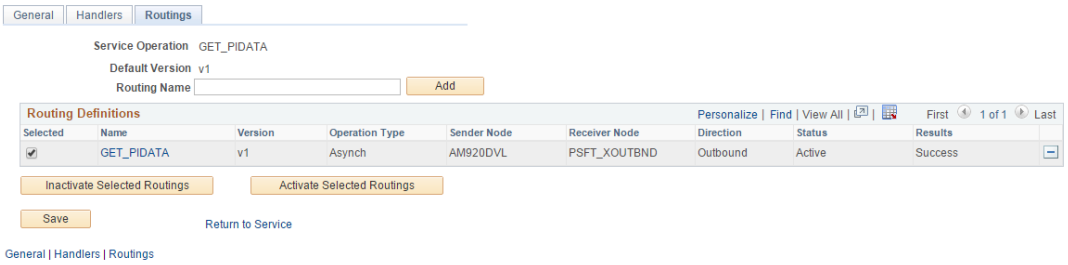
Figure 14-4 Service Operations - Routings page



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

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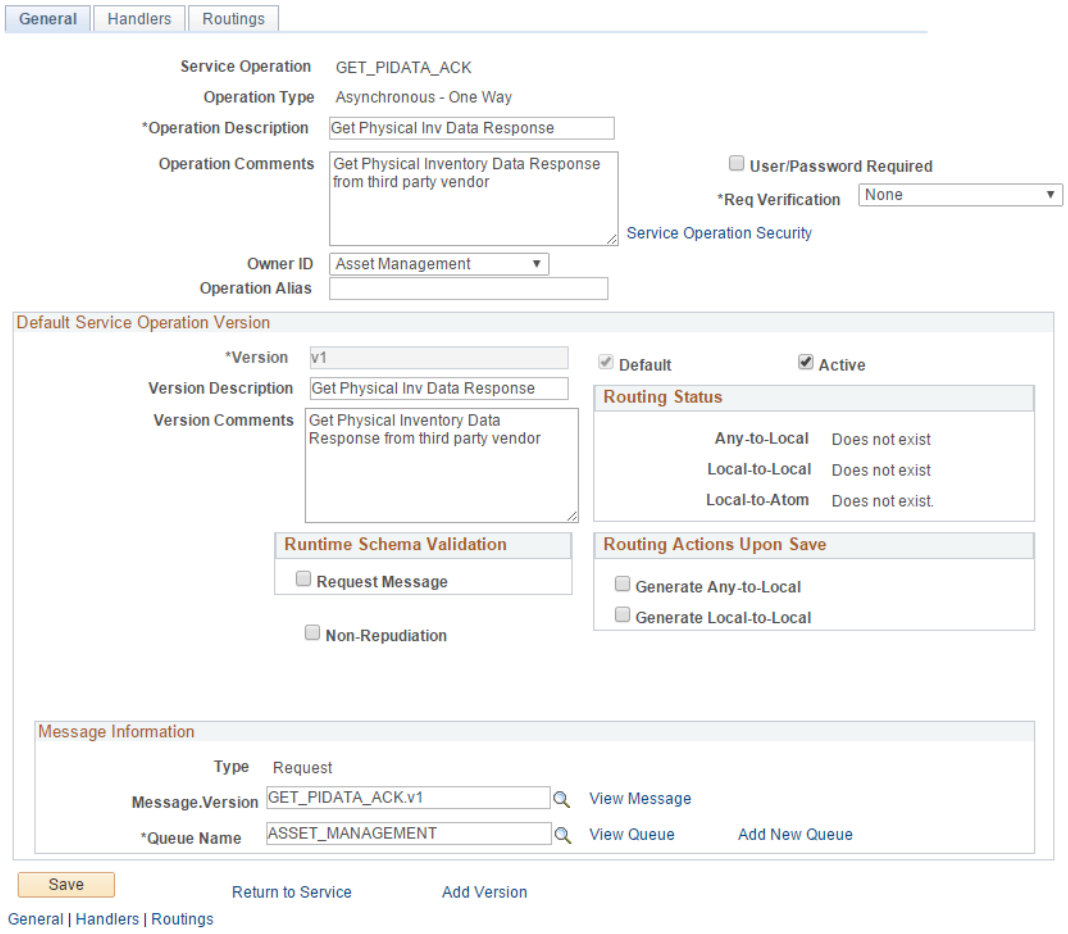
Figure 14-5 Service Operations - Routings page with the routing definition selected



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:

Figure 14-6 Service Operations - General page

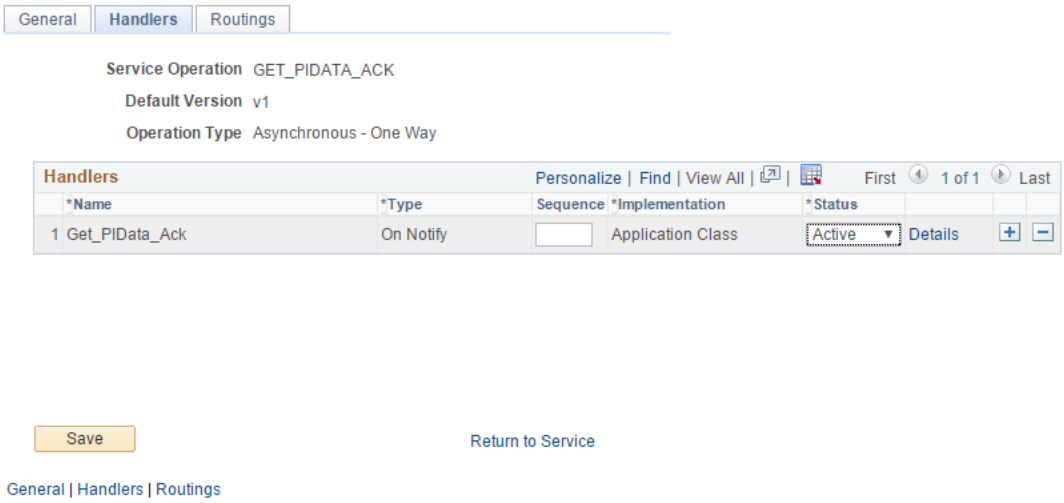


10. On the General page, select the Active check box and then click Save.
11. On the Save Message dialog box, click OK.

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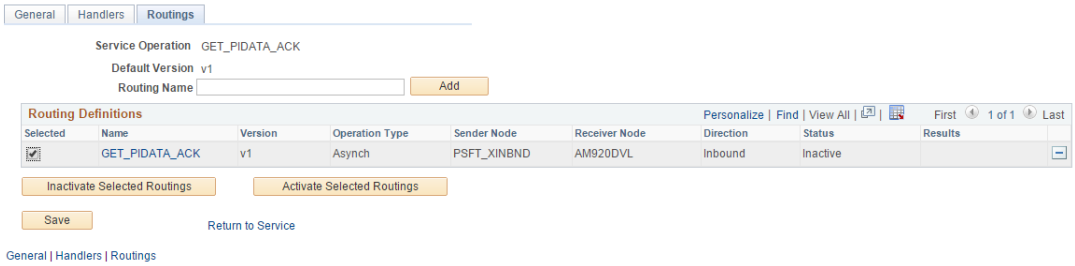
12. Select the Handlers tab to access the Handlers page, as shown in the following example:

Figure 14-7 Service Operations - Handlers page



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

Figure 14-8 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.

14.4 Running Message Channel

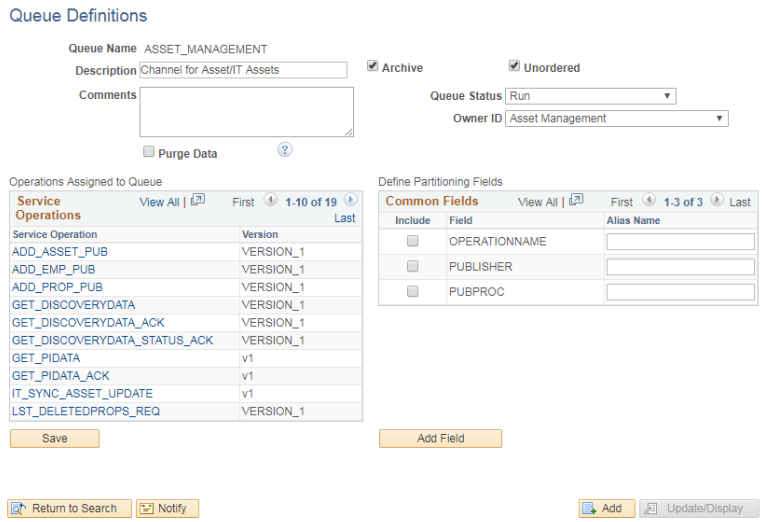
To run the message channel:

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

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

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Figure 14-9 Queue Definitions page



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

14.5 Activating the Domain for Asynchronous Messaging

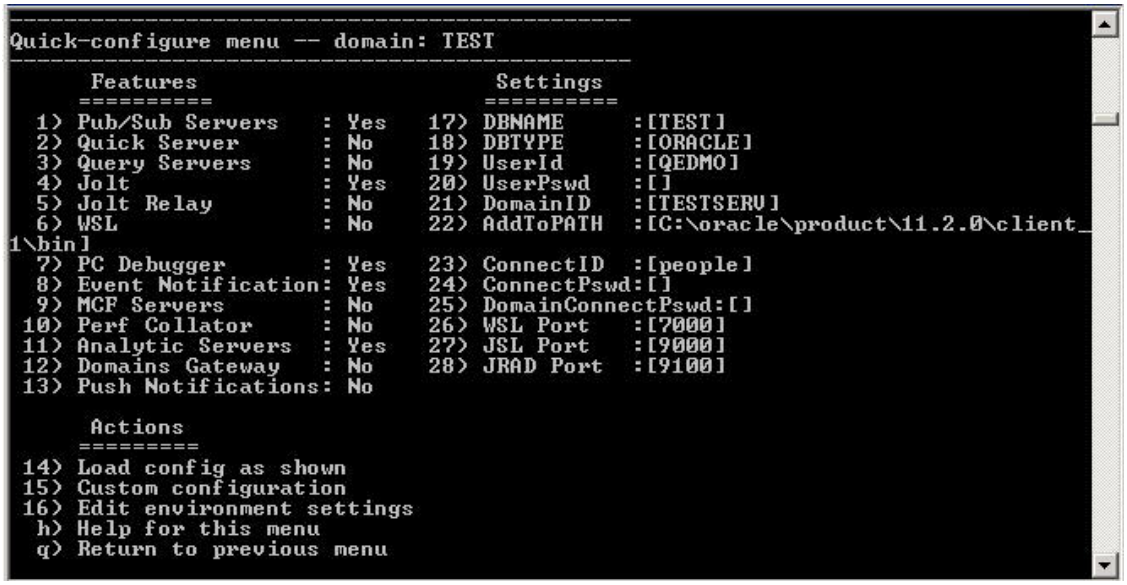
Asynchronous message handling in the PeopleSoft system is different from synchronous message handling. In the asynchronous mode, the system dumps a message into a queue and a message handler picks up the message and gives it to the message dispatcher. The dispatcher then delivers the message to the target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

To enable message handler and dispatcher:

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

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Figure 14-10 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.

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15

Integrating PeopleSoft 9.2 IT Asset Management with Network Inventory Discovery Systems

15.1 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.

15.2 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
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

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Routing Type	Request Message	Request Message Version
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.

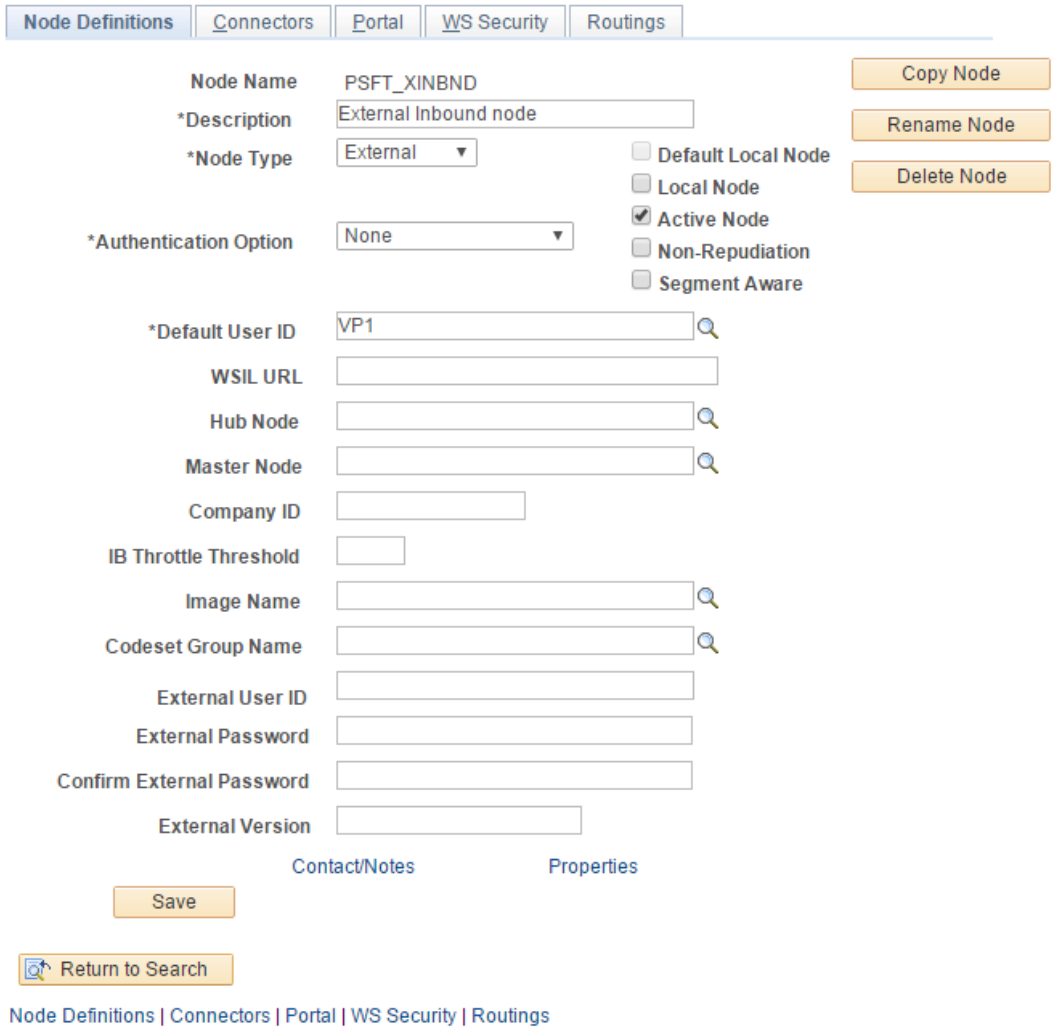
15.3 Configuring the Inbound Nodes

To configure the inbound nodes:

1. Select PeopleTools, Integration Broker, Integration Setup, Node Definitions.
2. On the Nodes search page, search for and select the node name *PSFT_XINBND*.
3. On the Node Definitions page, in the Default User ID field, enter the value for the user that submits the PROCESS_DISCOVERYDATA Service Operation into ITAM for the PSFT_XINBND node, as shown in the following example:

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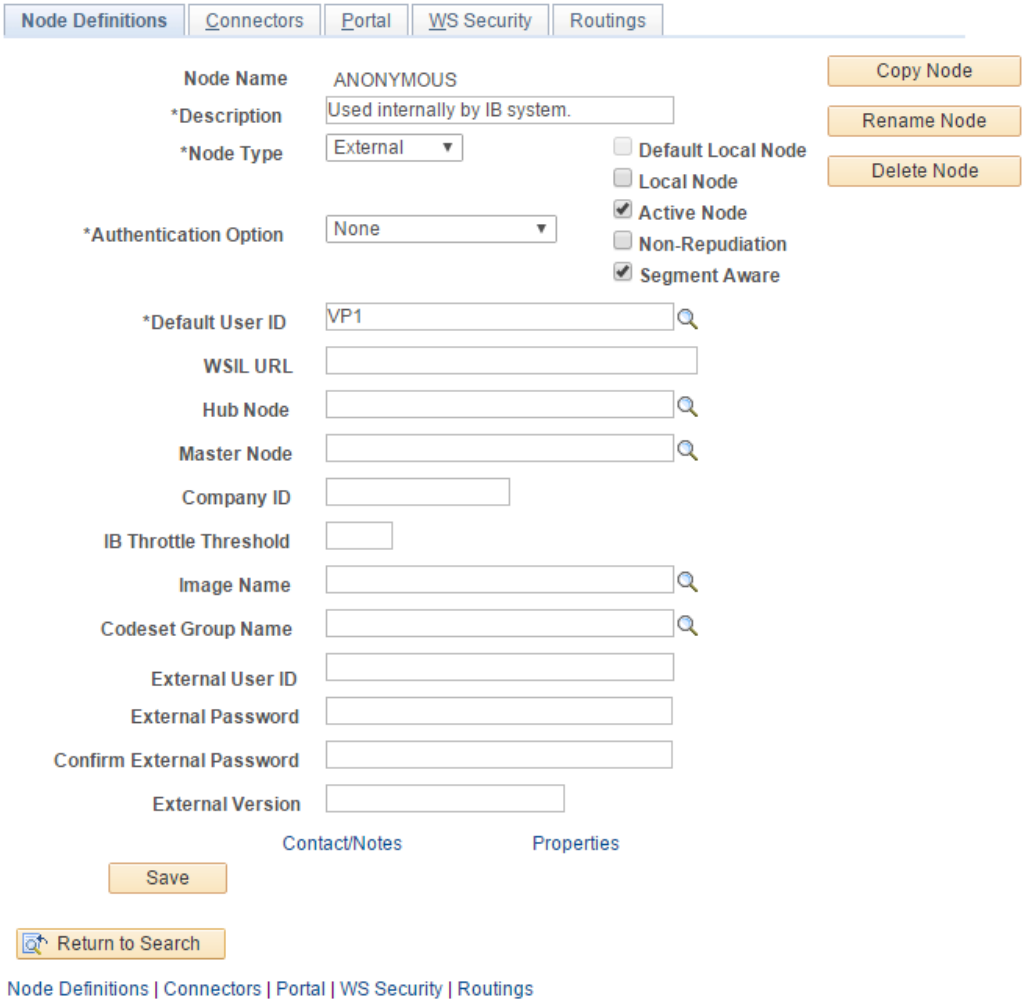
Figure 15-1 Node Definitions page for PSFT_XINBND



4. Click Save.
5. Click Return to Search.
6. On the Nodes search page, search for and select the node name *ANONYMOUS*.
7. On the Node Definitions page, in the Default User ID field, enter the value for the user that submits the PROCESS_DISCOVERYDATA Service Operation into ITAM for the ANONYMOUS node, as shown in the following example:

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Figure 15-2 Node Definitions page for ANONYMOUS



8. Click Save.

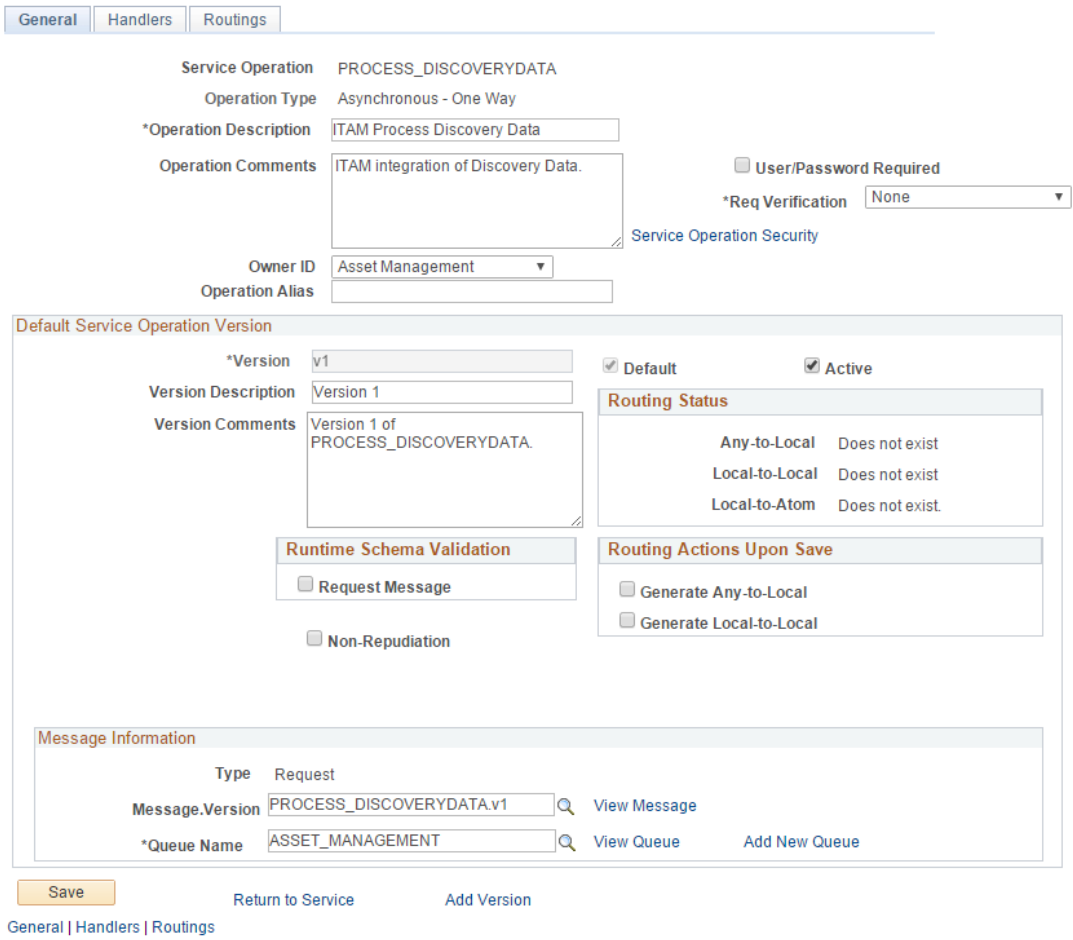
15.4 Activating Service Operations

To activate service operations:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operation Definitions.
2. On the Service Operations search page, search for and select the service operation *PROCESS_DISCOVERYDATA*.
3. On the Service Operations - General page, verify that the Active check box is selected, as shown in the following example:

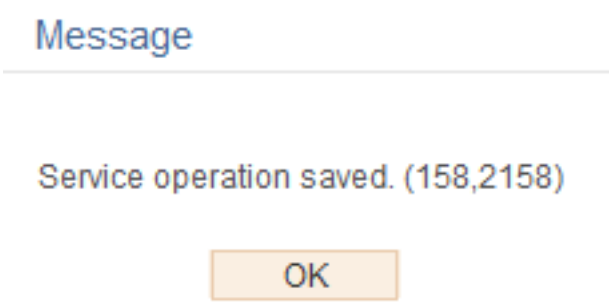
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Figure 15-3 Service Operations: General page



4. Click Save.
5. The message “Service operation saved” displays, as shown in the following example:

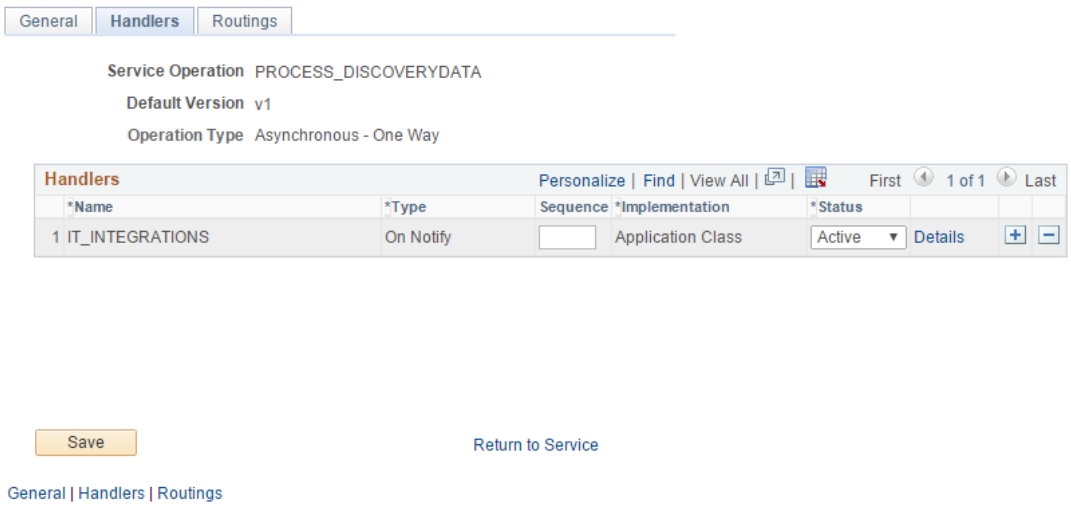
Figure 15-4 Service Operation: Saved Message page



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

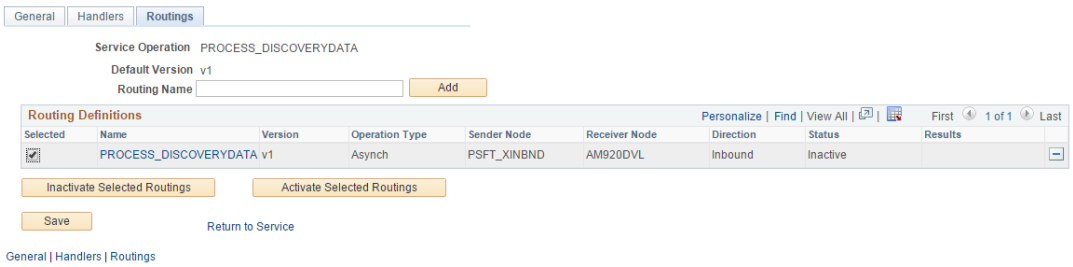
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Figure 15-5 Service Operations: Handlers page



8. On the Handlers page, in the Handlers group box, select *Active* from the Status drop-down list box.
9. Click Save.
10. Select the Routings tab and access the Routings page, as shown in the following example:

Figure 15-6 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.

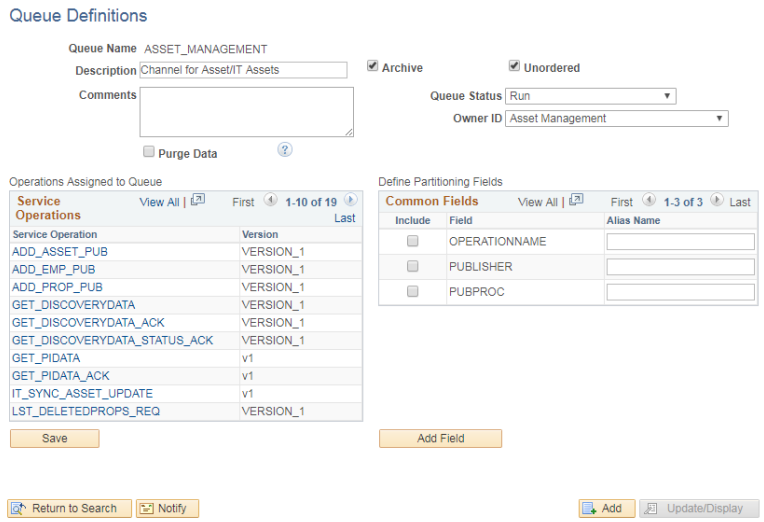
15.5 Managing Queue Status

To run the message channel:

1. Select PeopleTools, Integration Broker, Integration Setup, Queue Definitions.
2. On the Queues search page, search for and select the queue name *ASSET_MANAGEMENT*.
3. On the Queue Definitions page, in the Queue Status field, verify that Run is selected.
4. If the Queue Status is paused, select *Run* from the Queue Status drop-down list box, as shown in the following example:

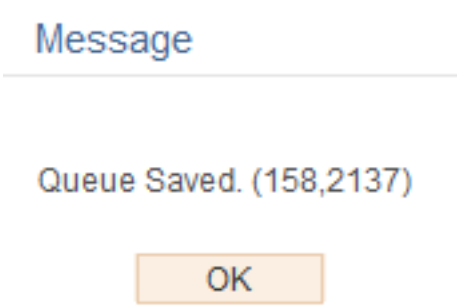
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Figure 15-7 Queue Definition



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

Figure 15-8 Queue Saved Message



7. Click OK.

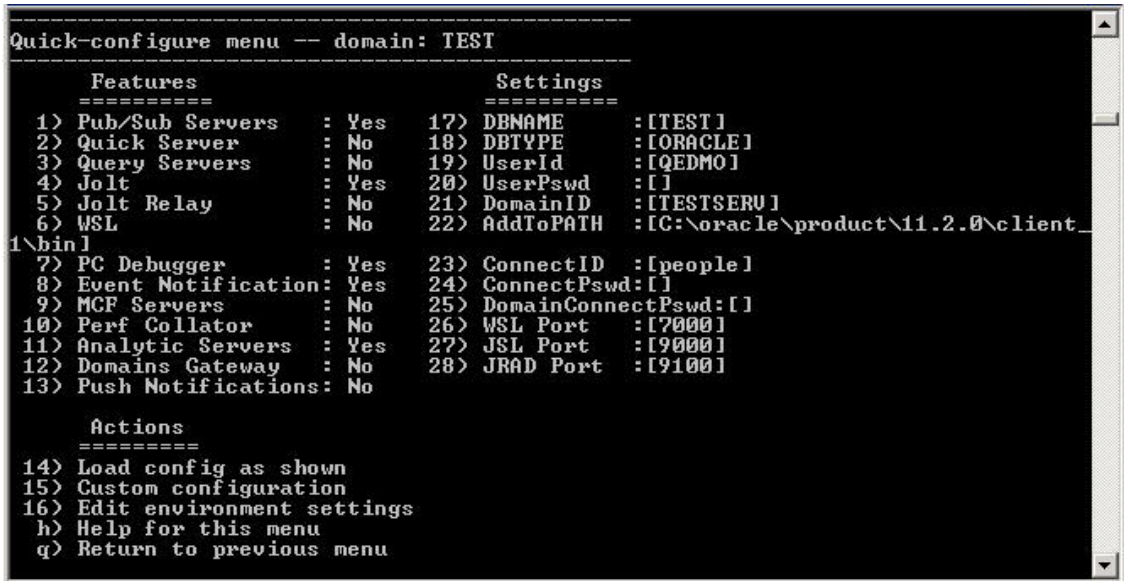
15.6 Activating the Domain for Asynchronous Messaging

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:

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Figure 15-9 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.

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16

Configuring eMail URLS in PeopleSoft SCM Applications

16.1 Configuring eMail URLs

16.1.1 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.

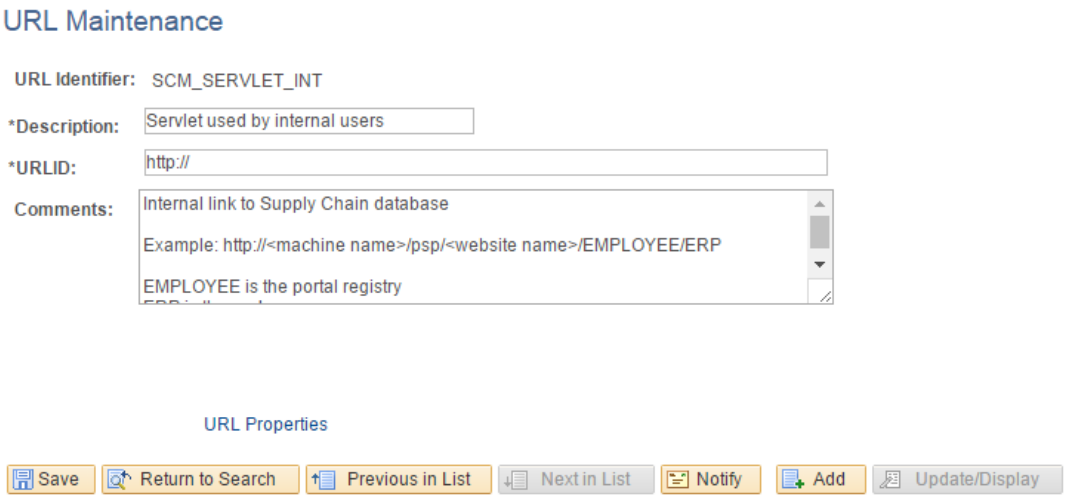
16.1.2 Configuring eMail URLs for Item Loader Exceptions

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, Maintain URLs to access the PeopleTools URL Maintenance page.
2. On the URL search page, search for the URL identifier *SCM_SERVLET_INT*.
3. On the URL Maintenance page, in the URL field, edit the URL to point to an internal server to access the PeopleSoft Supply Chain Management database, as shown in the following example:

Figure 16-1 URL Maintenance page for SCM_SERVLET_INT



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4. Click Save.

16.1.3 Configuring eMail URLs for Supplier Facing Applications

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

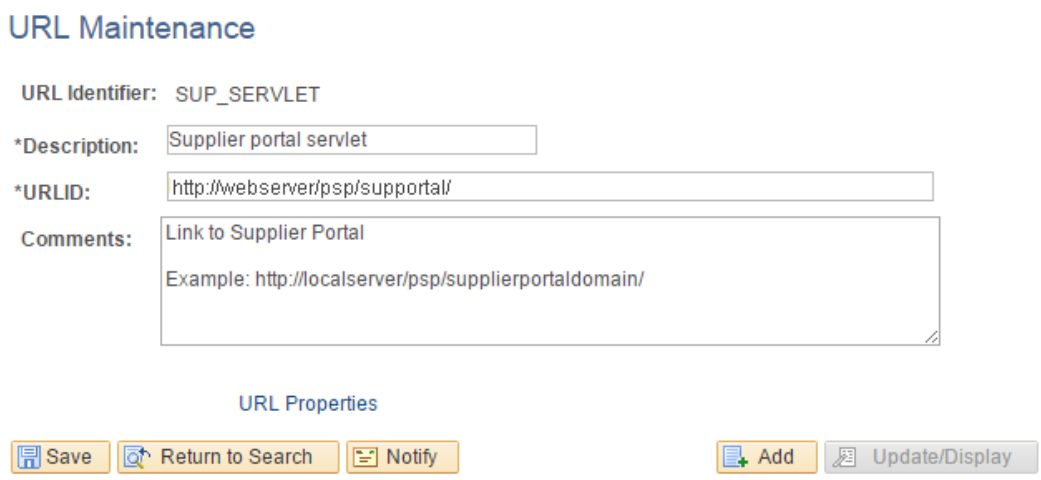
You must modify EMP_SERVLET, SUP_SERVLET, and SUP_OB_INVITE to point to the correct servers that you plan to use to access the PeopleSoft SCM database. These URLs are a requirement when you are not using an Enterprise Portal, as there is no other way to identify the different web servers used for the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

To set up these URLs:

1. Select PeopleTools, Utilities, Administration, Maintain URLs to access the PeopleTools URL Maintenance page.
2. On the URL search page, search for the URL identifier *SUP_SERVLET*.
3. On the URL Maintenance page, in the URL field, edit the URL to point to an EXTERNAL server to access the PeopleSoft Supply Chain Management database.

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

Figure 16-2 URL Maintenance page for SUP_SERVLET

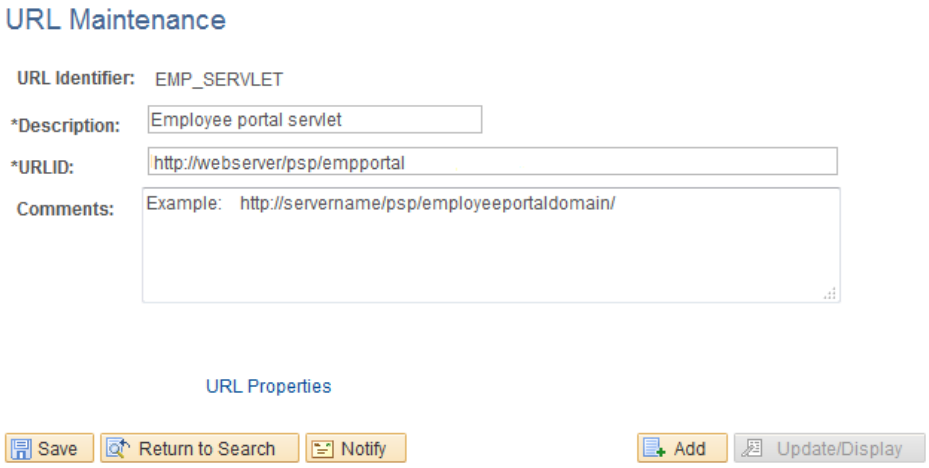


4. Click Save.
5. Click Return to Search.
6. On the URL search page, search for the URL identifier *EMP_SERVLET*.
7. On the URL Maintenance page, in the URL field, edit the URL to point to an INTERNAL server to access the PeopleSoft Supply Chain Management database.

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

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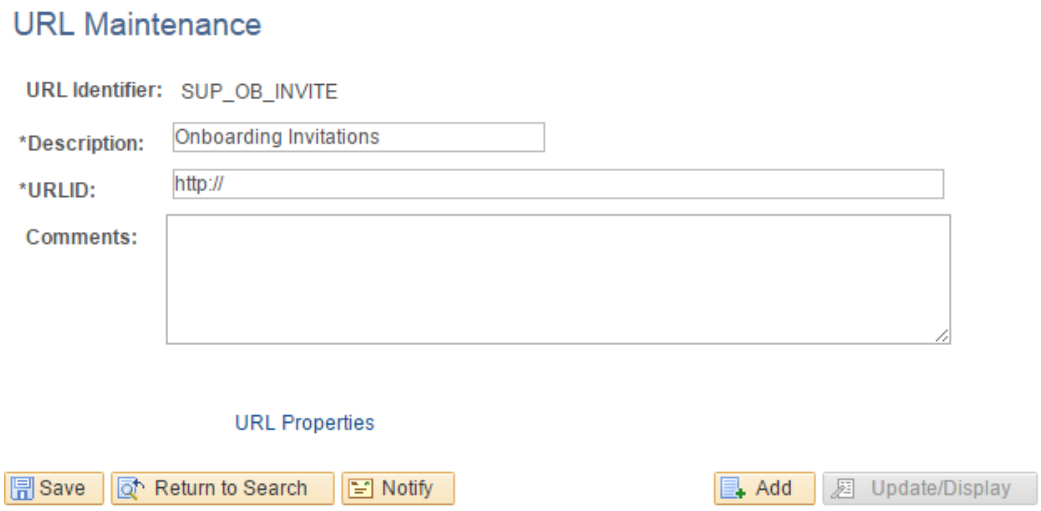
Figure 16-3 URL Maintenance page for EMP_SERVLET



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:

Figure 16-4 URL Maintenance page for SUP_OB_INVITE



12. Click Save.

16.1.4 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.

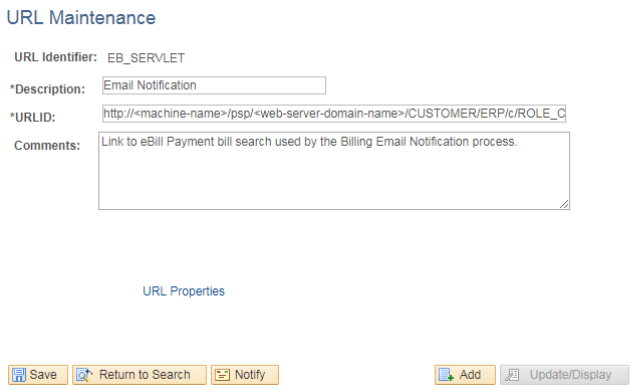
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To set up the URL:

1. Select PeopleTools, Utilities, Administration, Maintain URLs to access the PeopleTools URL Maintenance page.
2. On the URL search page, search for the URL identifier *EB_SERVLET*.
3. On the URL Maintenance page, edit the URL to point to an EXTERNAL server to access the PeopleSoft Supply Chain Management database.

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

Figure 16-5 URL Maintenance page for EB_SERVLET



4. Click Save.

16.2 Setting Up Pagelets

16.2.1 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.

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> **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.

16.2.2 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.

16.3 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.

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17

Setting Up PeopleSoft Supplier Relationship Management Applications

17.1 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.

17.2 Granting Security in PeopleSoft Fluid Requisition

17.2.1 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.

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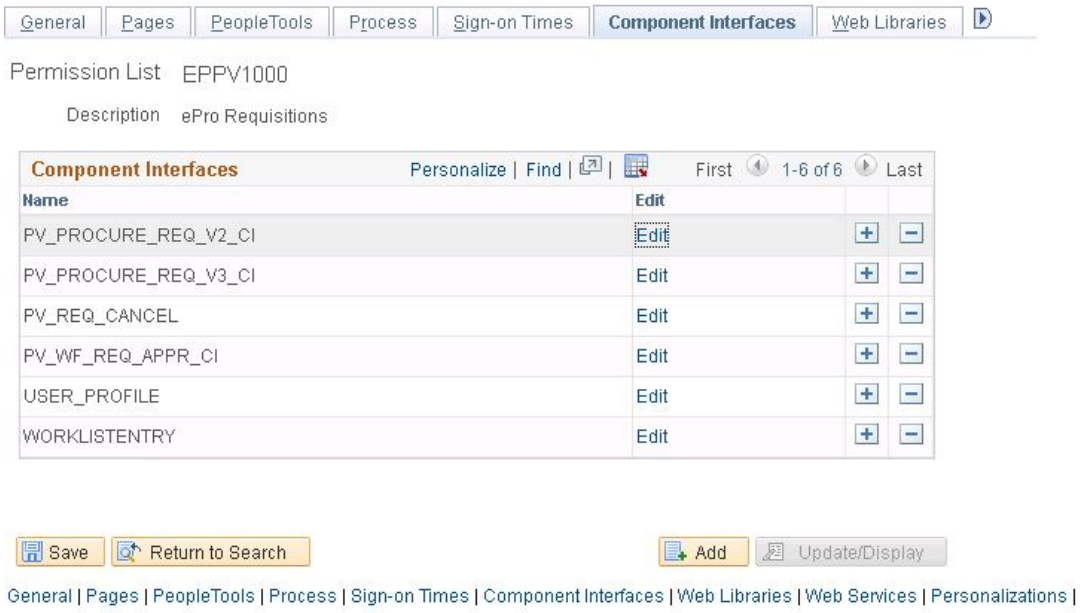
17.2.2 Granting Access to Component Interfaces

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

1. Select PeopleTools, Security, Permissions and 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:

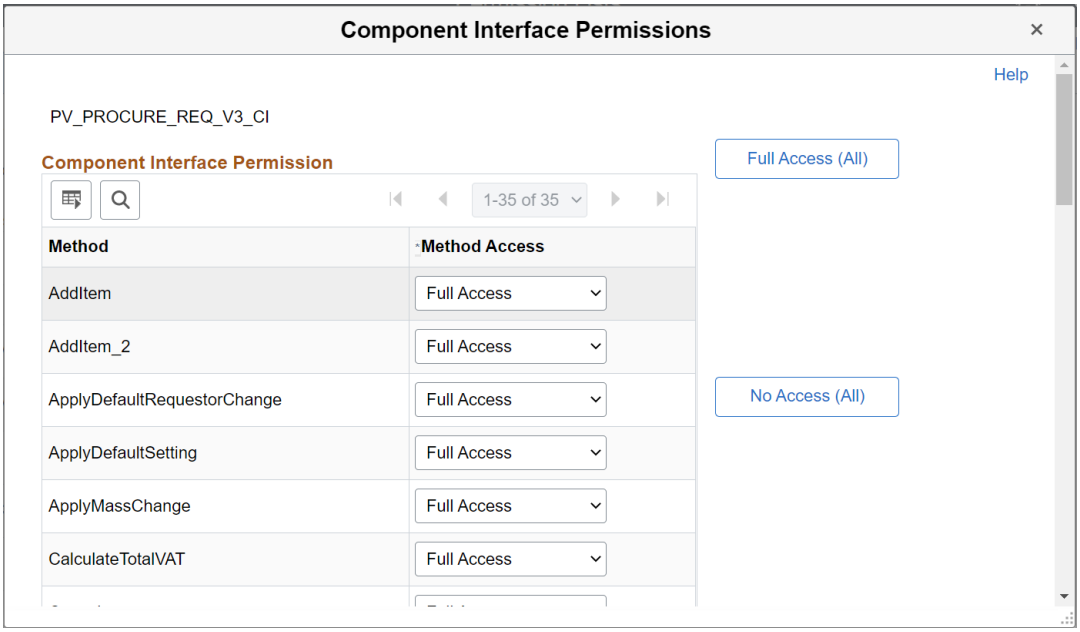
Figure 17-1 Permission Lists page: Component Interfaces tab for PV_PROCURE_REQ_V3_CI



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

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Figure 17-2 Component Interface Permissions page for PV_PROCURE_REQ_V3_CI



6. Click OK.

17.2.3 Granting Access to Web Libraries (IScript Functions)

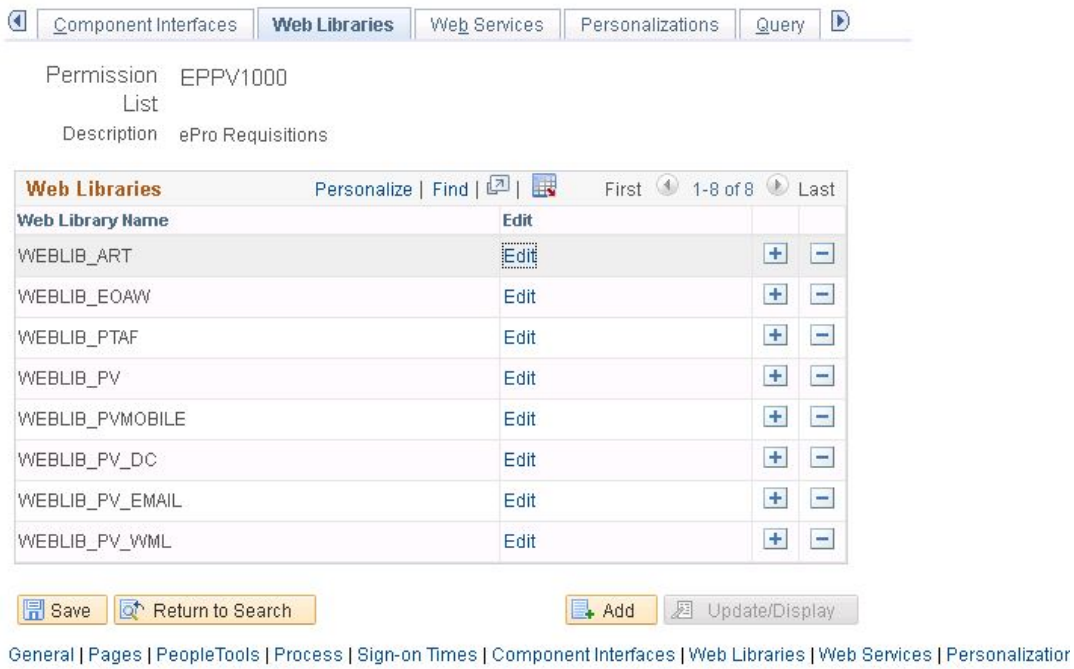
Fluid Requisition also requires the use of various IScript functions which are present inside Web Libraries. IScript functions are PeopleSoft records that start with prefix IScript_.

To grant permission to Web Libraries:

1. Select PeopleTools, Security, Permissions and 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:

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Figure 17-3 Permission Lists page: Web Libraries tab for WEBLIB_PV

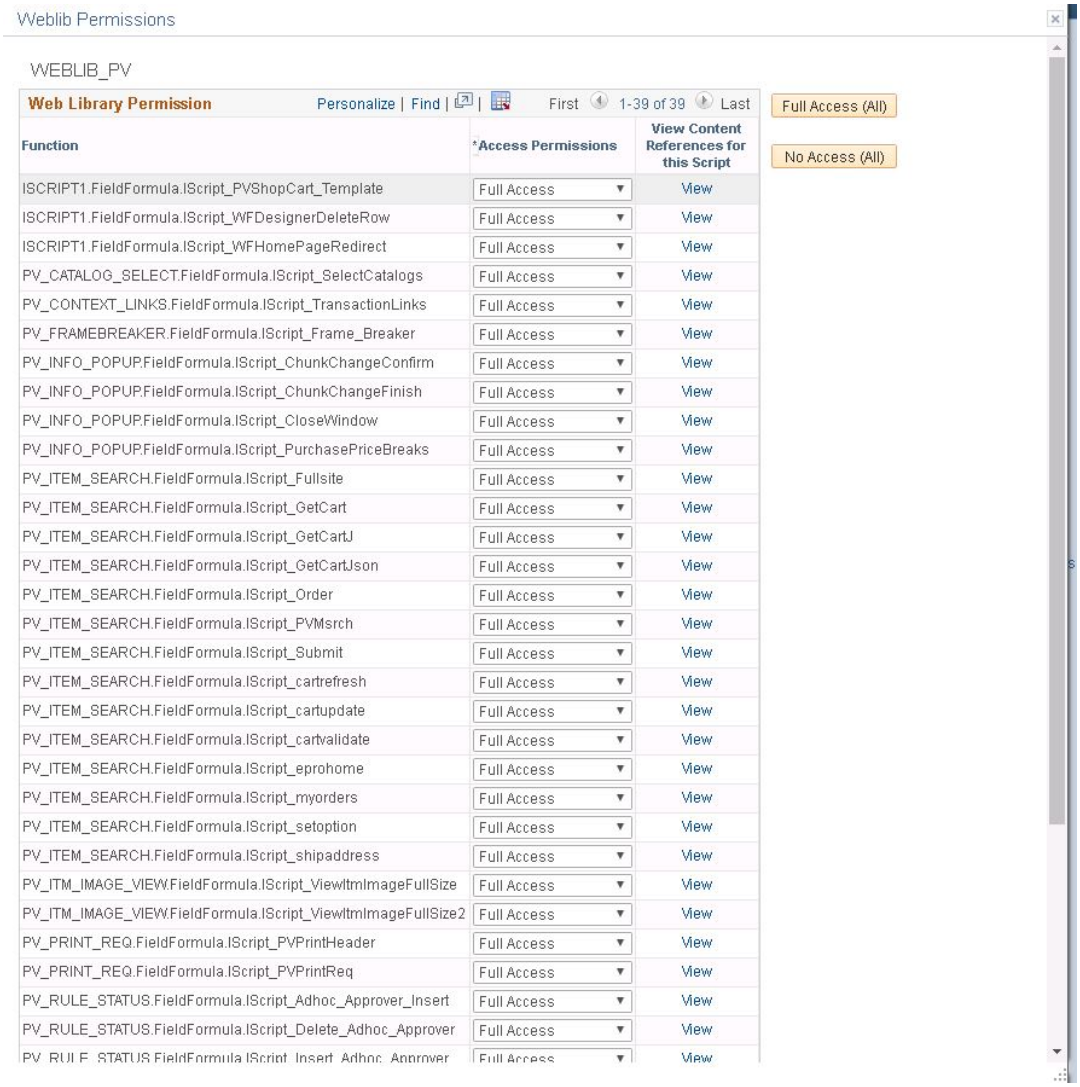


> **Note**
>
> Once one of these records is added to the Web Libraries tab of the Permission List component, all functions that contain the prefix in any field is automatically displayed in the Web Library permissions secondary page.

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

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Figure 17-4 Weblib Permissions page for WEBLIB_PV



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

   Grant Full Access to the following:

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

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

   Grant Full Access to the following:

   - PV_ISCRIPT_LIB.FieldFormula.IScript_DCCatcher
   - PV_ISCRIPT_LIB.FieldFormula.IScript_DirectConnect

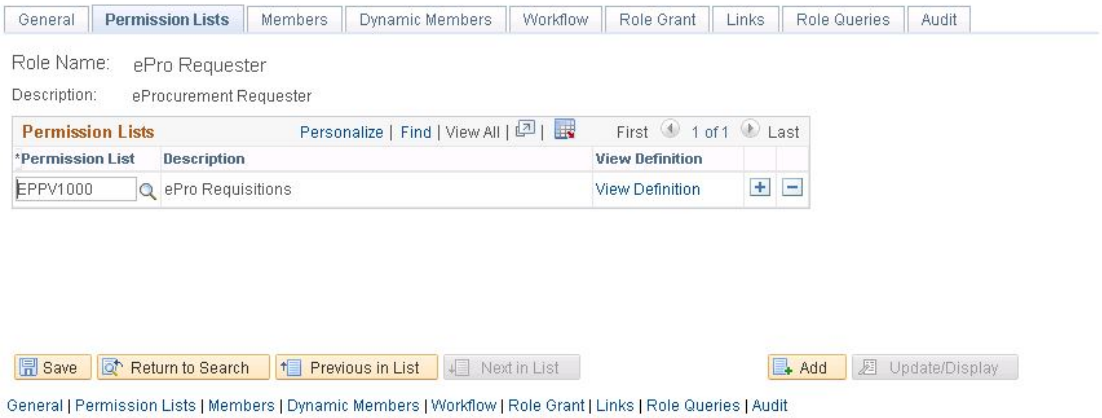
17.2.4 Granting Access to Users

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.

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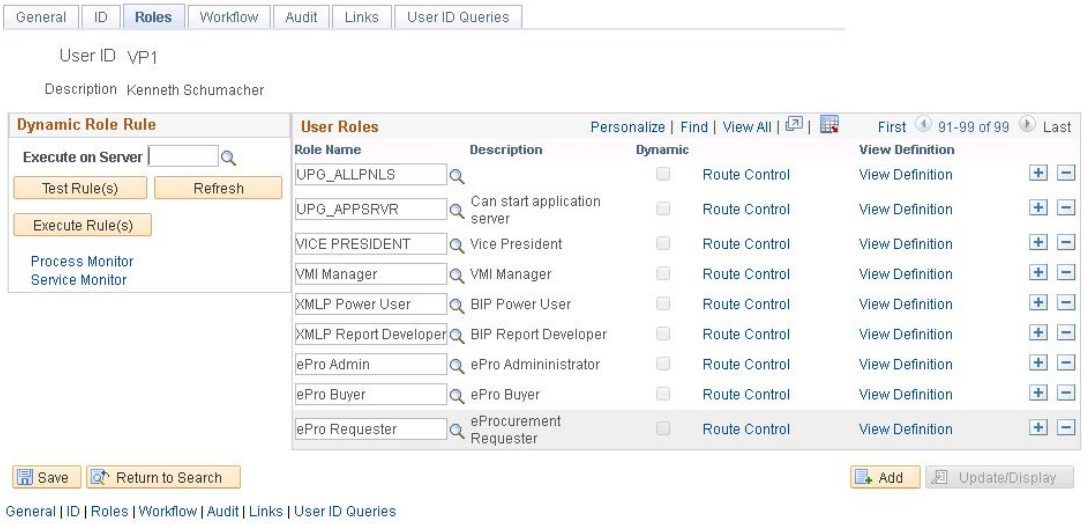
You can also assign the Permission List EPPV1000 to any roles that would grant Fluid Requisition permissions to any user belonging to the assigned roles. The following example shows that the Permission List EPPV1000 is assigned to the role ePro Requester:

Figure 17-5 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:

Figure 17-6 User Profiles page: Roles tab



17.2.5 Granting Access to Menu and Components

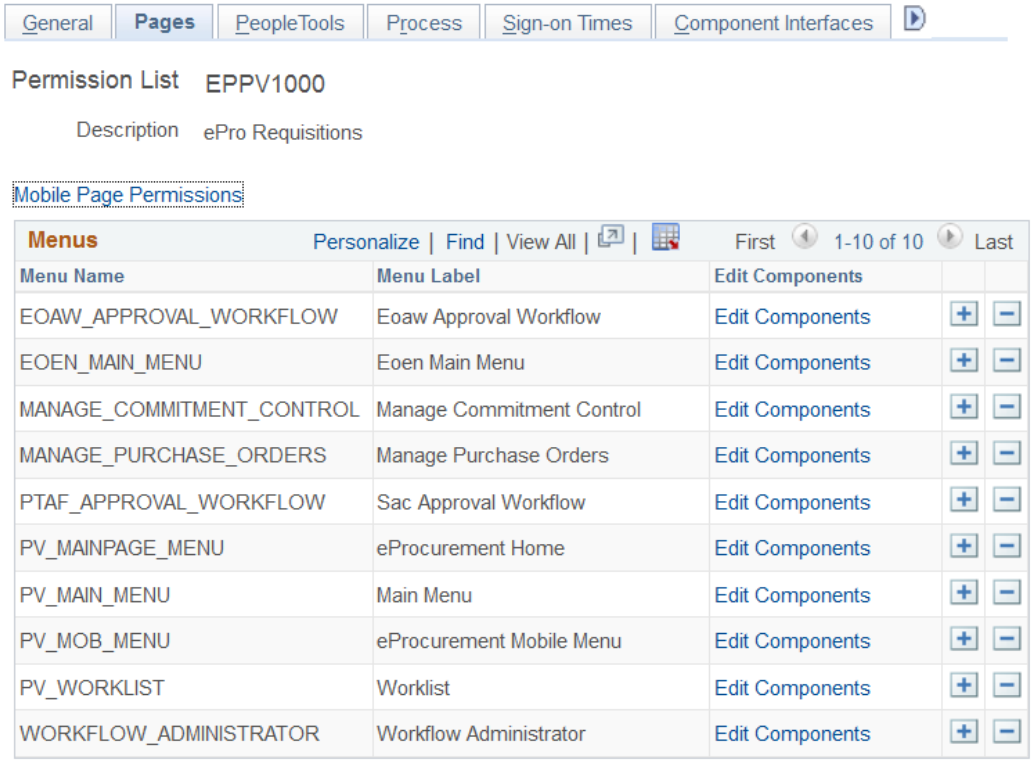
To grant permission to permission list, navigate to the PeopleTools Permission Lists component:

1. Select PeopleTools, Security, Permission and Roles, Permission Lists.
2. Search for and select the Permission List *EPPV1000*.

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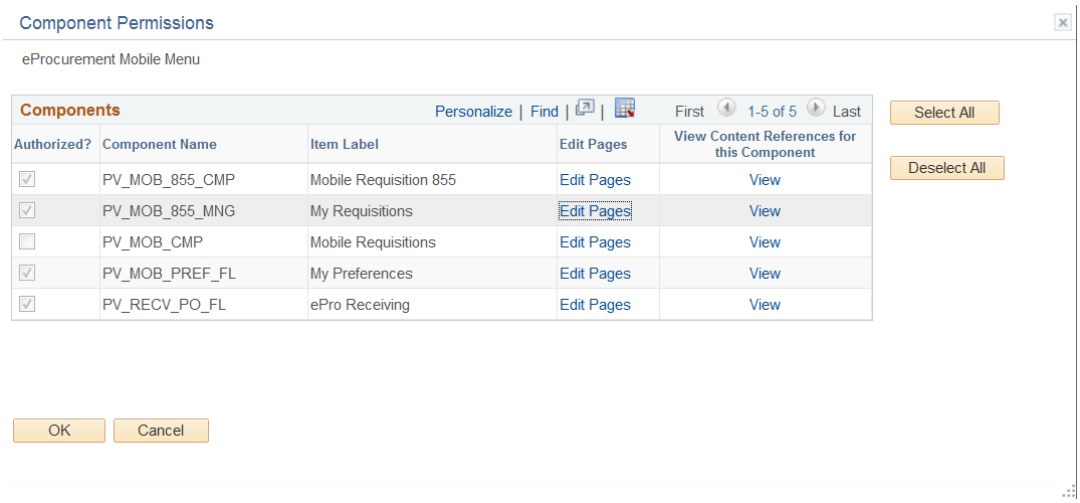
3. Select the Pages tab Fluid Requisition requires the use of Menu PV_MOB_MENU.
4. Select Edit Components hyperlink for Menu PV_MOB_MENU on Pages tab as shown in the following example:

Figure 17-7 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:

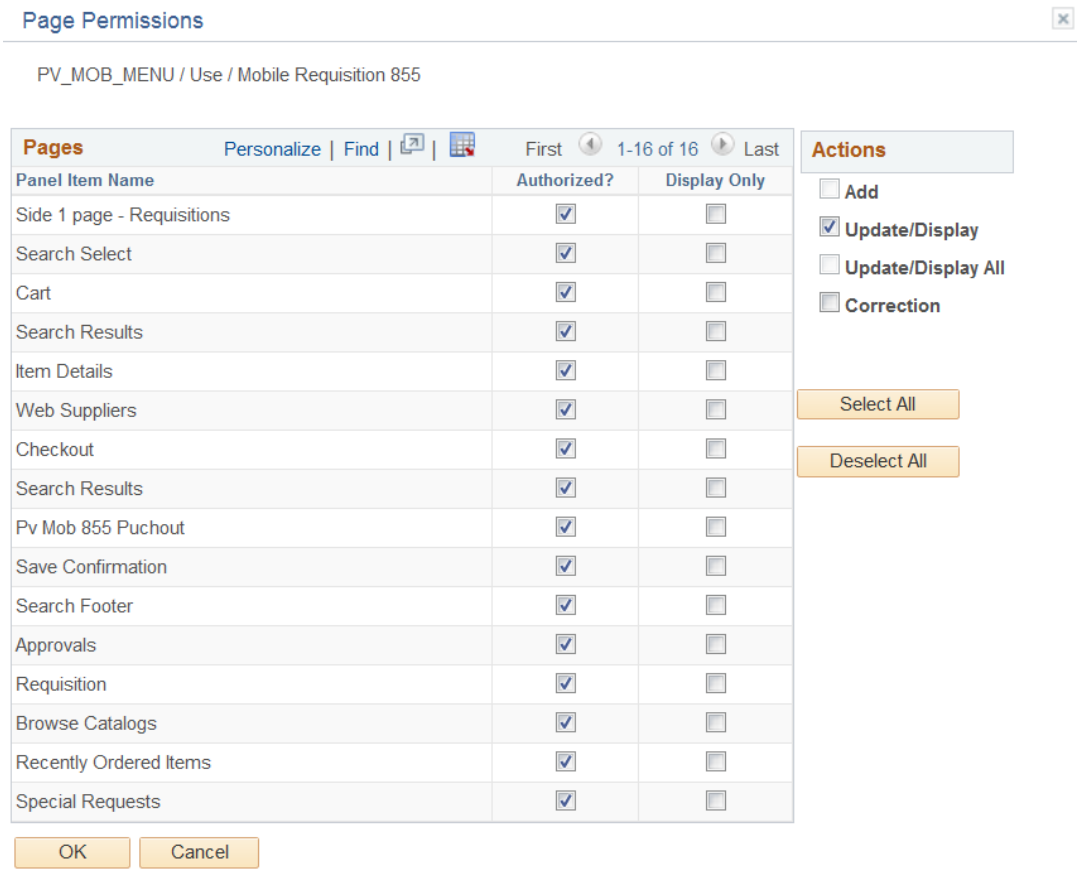
Figure 17-8 Component Permissions: Component Name PV_MOB_855_CMP



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

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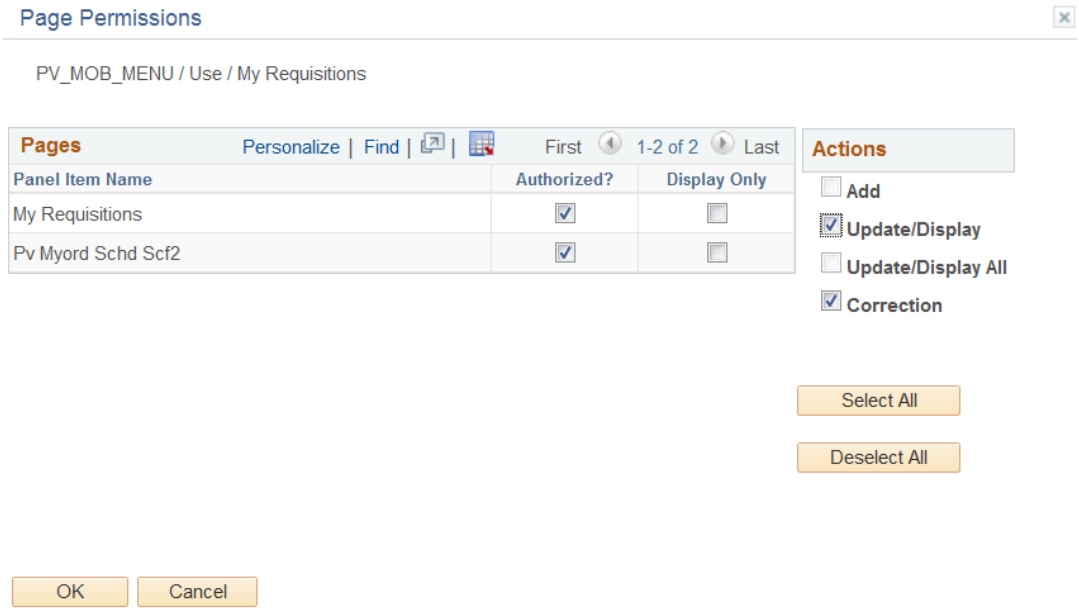
Figure 17-9 Page Permission: Authorized



7. Click OK.
8. Repeat steps 5 through 7 to select Edit Pages hyperlink for Component Name PV_MOB_855_MNG and Select All Actions.

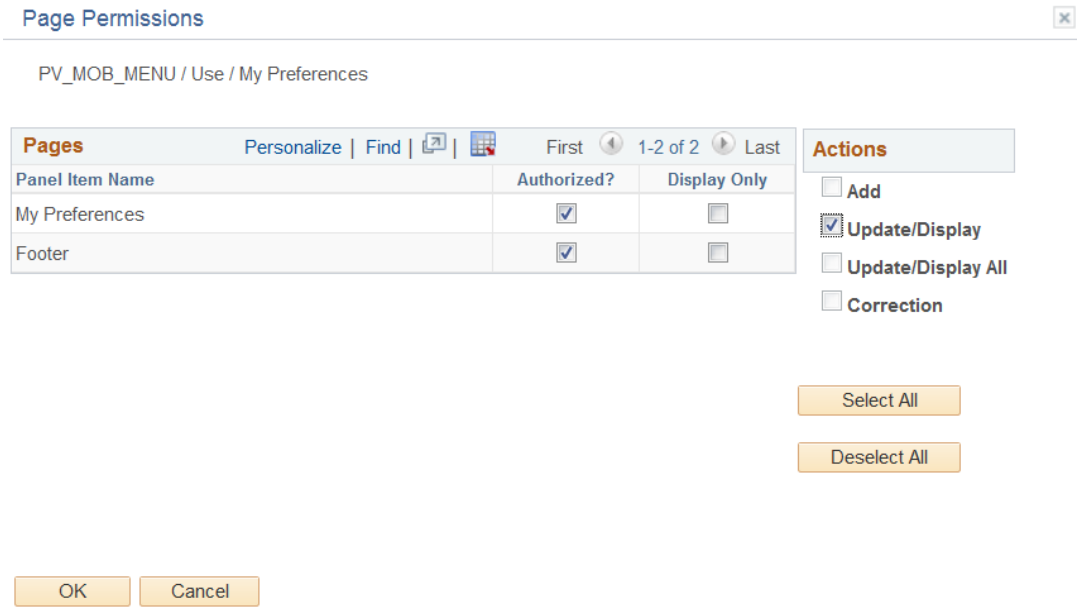
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Figure 17-10 Page Permissions: Component Name PV_MOB_855_MNG



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

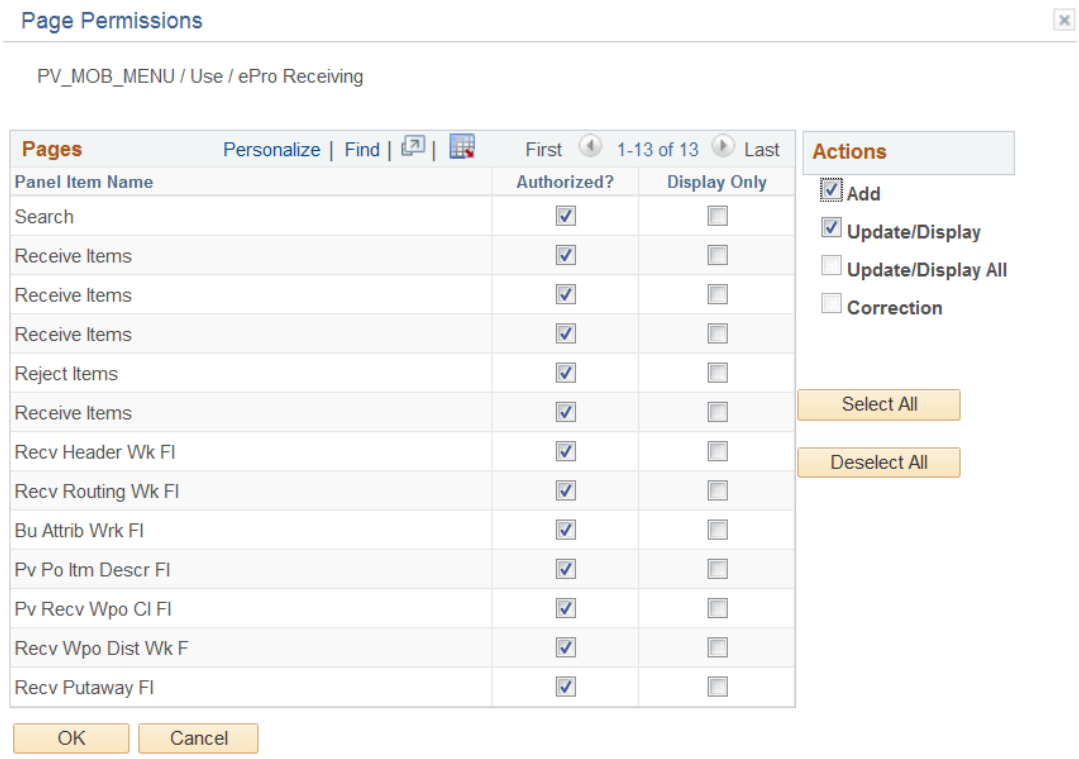
Figure 17-11 Page Permissions: Component Name PV_MOB_PREF_FL



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

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Figure 17-12 Page Permissions: Component Name PV_RECV_PO_FL



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

17.3 Setting Up the PeopleSoft Search Framework Search Engine in Fluid Requisition

17.3.1 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."

17.3.2 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.

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For instructions to deploy the eProcurement search definitions,

See PeopleTools: Search Technology, "Administering PeopleSoft Search Framework," Working with Search Indexes.

In addition to the preceding search definitions, you must deploy the search category EP_PV_MASTERITEMVENDOR_CAT from the Search Categories tab.

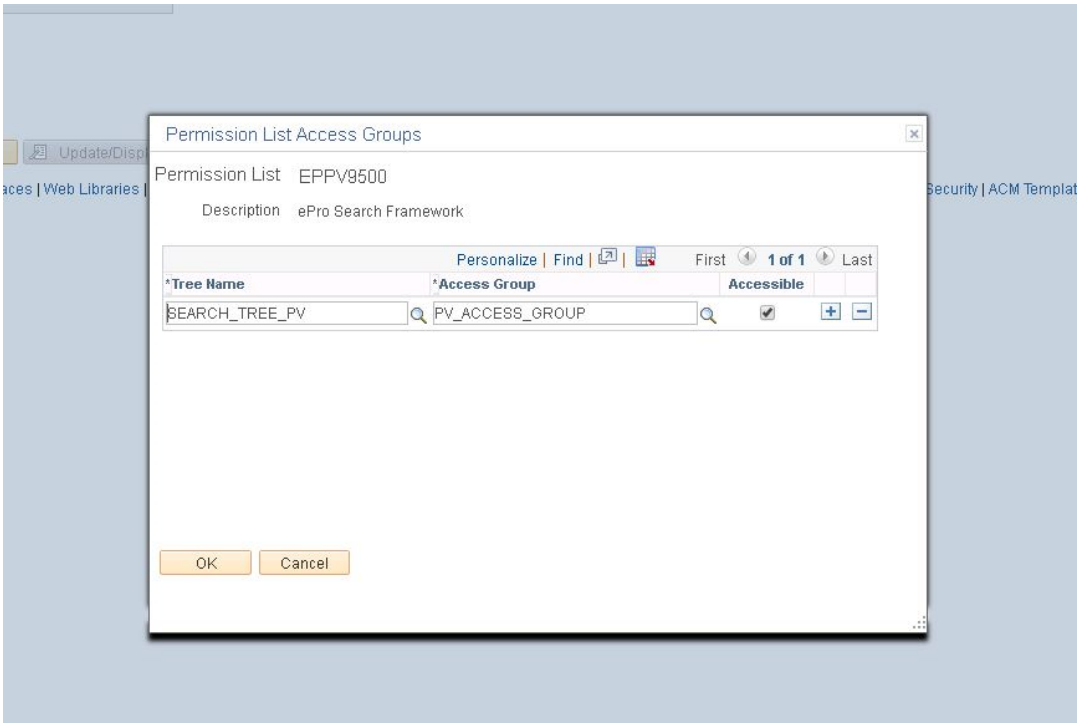
Before indexing the search definitions, verify that the user has been assigned to the Permission List EPPV9500.

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

To verify:

1. Select PeopleTools, Security, Permissions and 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:

Figure 17-13 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,

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See PeopleTools: Search Technology, "Administering PeopleSoft Search Framework," Working with Search Indexes, for each eProcurement search definition.

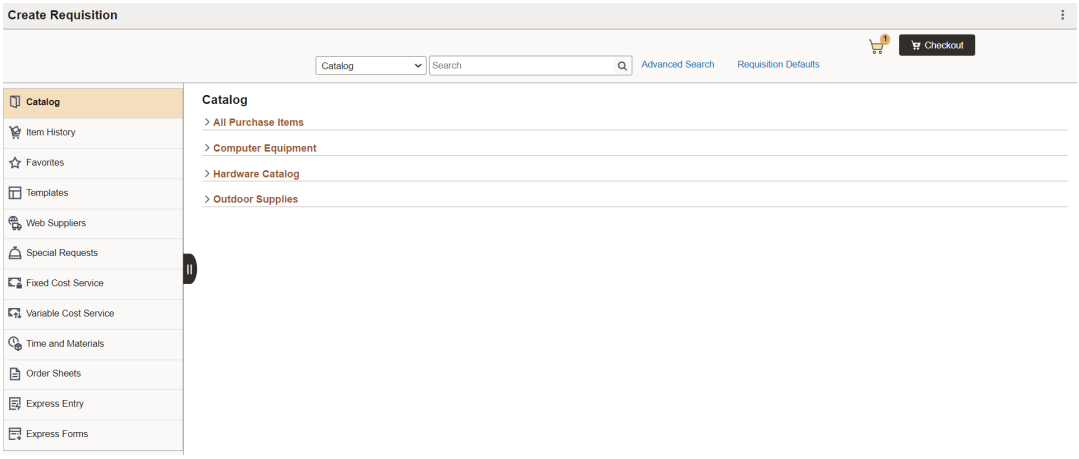
See PeopleSoft FSCM: Applications Fundamentals, "PeopleSoft Search for Financials and Supply Chain Management," Understanding the Build Index Process.

> **Note**
>
> Classic Create Requisitions, Casual Receiving and Manage Requisition were desupported at the end of 2021. From now, use the Fluid versions. The Fluid version automatically uses Search Framework. For best performance, upgrade to a minimum of PeopleSoft Image 45 or take the Fluid enhancement bugs for these functions.

To verify that the search engine is working:

1. On Employee Self Service Home page, select eProcurement tile, next select Create Requisition tile.
2. In the search bar, select the search type as Catalog, and enter a suitable text to search, for example, *Printer*, as shown in the following example:

Figure 17-14 Requisition Page: Verify Search Type



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

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

17.3.3 Application Searching (Global Search) Security

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

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

1. Select PeopleTools, Security, Permissions and Roles, Permission Lists.

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2. Search for and select the Permission List EPPV1000.
3. Select the Search Groups tab.
4. Select the catalog item EP_CATALOG_ITEMS from the lookup prompt, which is the Search Category specified as Search Group, as shown in the in the following example:

Figure 17-15 Permission Lists page: Search Groups tab for EPPV1000



> **Note**
>
> Search categories flagged as search groups will only appear in the lookup prompt.
>
> Alternatively, you can also assign the delivered role Search Catalog.

5. Click Save. Global Search bar appears after adding the search group.

> **Note**
>
> The user may need to log out and log in back to see the global search bar. Additionally, this type of searching must be activated as part of the Portal configuration.

The user associated with a role connected with the permission list and any search groups assigned as searchable targets should be able to see the global search bar.

17.4 Installing OSNConnector for PeopleSoft eProcurement

17.4.1 Prerequisites

OSNConnector is used to integrate PeopleSoft eProcurement with Oracle Supplier Network (OSN). It works with WebLogic 12 and PeopleTools version 8.63.xx.

OSNConnector installation must take place after you install PeopleSoft PeopleTools 8.63.

17.4.2 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:

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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 tha 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
```


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```
Encrypting OPERATOR user...
Encrypting done.
PIA_INSTALL_SUCCESS
```

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

   In Windows system:

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

17.4.3 Configure the Integration Gateway Properties

Next, you need to configure the Integration Gateway properties.

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To configure the Integration Gateway properties:

1. Open the integrationGateway.properties file to edit.

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

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

2. In the file, search for ig.log.level property and set the level to *4* so as to control the logging level.

3. 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=8.63

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=8.63
```

   > **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`

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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_NETWOR
  K:ADVANCED_SHIPPING_RECEIPT:VERSION_2/
  ACKNOWLEDGE_PO_008:PSFT_ORACLE_SUPPLIER_NETWORK:PURCHASE_ORDER_ACKNOWLED
  GEMENT/PROCESS_INVOICE_002:PSFT_ORACLE_SUPPLIER_NETWORK:EM_VOUCHER_IN/
  AUTO_CATALOG_001:PSFT_ORACLE_SUPPLIER_NETWORK:PV_CATALOG_SYNC
  ```

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

17.4.4 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
     ```


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

```
SET CLASSPATH=%OSN_CP%;%PSCLASSPATH%;%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=.:${PSCLASSPATH}:${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.

17.4.5 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%\webserv\PSDomain name\applications\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_OSNL
isteningConnector</servlet-class>
        </servlet>
```


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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.

17.4.6 Setting Up the Gateway for Integration Broker

To set up the Integration Broker gateway:

1. Select PeopleTools, Integration Broker, Configuration, Integration 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, Node Definitions, 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. Select PeopleTools, Integration Broker, Integration Setup, Service Operation Definitions.
7. Activate the following services, and handlers within the services:

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

8. Select People Tools, Integration Broker, Integration Setup, Queue Definitions, and ensure that the following queues's status is set to *Run*:
   - ADVANCED_SHIPPING_NOTICE
   - EM_VOUCHER_IN
   - PURCHASE_ORDER
   - PV_MS_ORD_DISPATCH

17.4.7 Troubleshooting OSNConnector Installation

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

- Check the log files in the %PSHOME%\webserv\PSDomain name\applications\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. Select PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Monitor Asynchronous Services.
  2. Verify that the services, messages, and node are active.

17.5 Setting Up PeopleSoft G-Invoicing

17.5.1 Understanding PeopleSoft G-Invoicing

The U.S. Federal Government Department of the Treasury implemented the G-Invoicing system to manage intra-governmental (IGT) buy sell transactions. IGT transactions result from business activities conducted between two federal entities known as trading partners. G-Invoicing provides a common platform for all IGT Buy/Sell activity.

PeopleSoft provides integration that supports the G-Invoicing Requesting Agency intra-governmental Procure-to-Pay business process.

For more information on PeopleSoft G-Invoicing,

See PeopleSoft FSCM 9.2: PeopleSoft Purchasing, U.S. Federal G-Invoicing.

See PeopleSoft FSCM 9.2: PeopleSoft Payables, Processing PeopleSoft Payables for U.S. Federal Agencies, "U.S. Federal G-Invoicing Processing."

Follow the instructions in this task to set up G-Invoicing.

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17.5.2 Configuring Integration Broker Gateway

Configure Integration Broker Gateway to communicate with third-party software.

To configure:

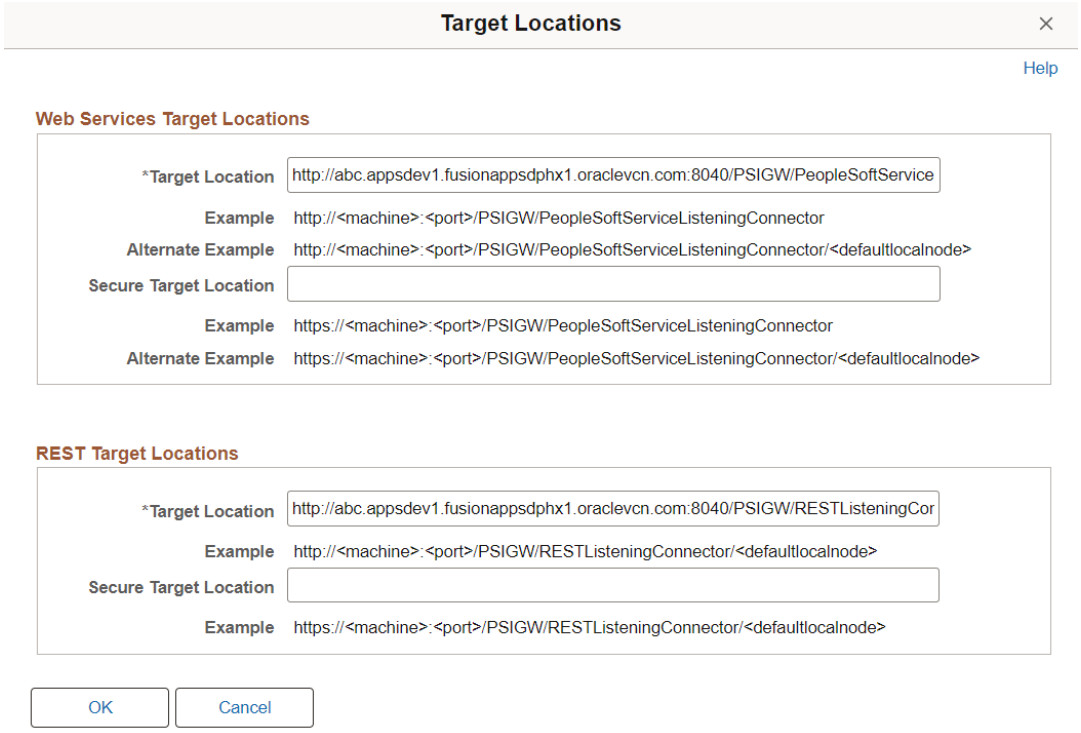
1. Select PeopleTools, Integration Broker, Configuration, Gateways.
2. Ensure that the Local Gateway check box is selected, which implies that a local gateway exists.
3. Ping the gateway and ensure it is *Active*.

17.5.3 Configuring REST Listening Connector

To configure:

1. Select PeopleTools, Integration Broker, Configuration, Service Configuration.
2. Click the Setup Target Locations hyperlink.
3. Make sure the web service target location and REST target locations are configured, as shown in the following example:

Figure 17-16 Configuring REST Listening Connector



17.5.4 Activating Local Node in PeopleSoft

The local node in PeopleSoft must be active.

To activate:

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1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Click Search, and choose the node that has default local node as *Y*.
3. To make sure that node is active, open the Connectors tab and select the Ping button. The ping should be successful.

17.5.5 Creating External Node for GET

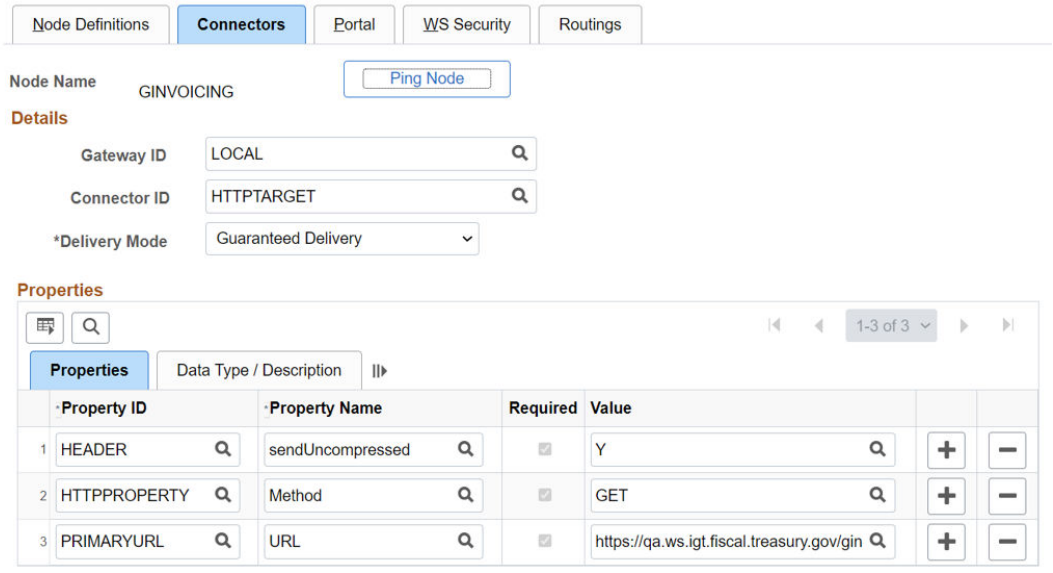
Verify if PeopleSoft can communicate with external website or URL end points. Next, create a new external node and ping.

To create:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Add a new value.
3. Provide a description for external node and change the node type to *External*.
4. Choose the default User ID that has access to invoke integrations in PeopleSoft.
5. Select the Connectors tab and choose *HTTPTARGET* connector ID for REST.
6. Enter the primary URL of the G-Invoicing system.
7. The default HTTPPROPERTY value is *POST*. If G-Invoicing API is responding, then change the HTTPPROPERTY to *GET*.

   Review the following example:

Figure 17-17 Creating External Node for GET



8. Save the external node and ping.

> **Note**
>
> You will get an error if the contact certificate is not properly configured. Resolve this by installing G -Invoicing digital certificate on the PeopleSoft web server.

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17.5.6 Creating External Node for POST

To create an external node:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Enter the primary URL for the G-Invoicing system.
3. Install Digital Certificate on web server.

   For more information on installation details, refer G-Invoicing Certificate Download and System Setup Guide provided by the U.S. Treasury.
4. If you have changed the password for your key manager first time, update it in the Gateway properties file.

   To update:

   a. Select PeopleTools, Integration Broker, Configuration, Gateways.
   b. Select your local gateway and click on Gateway Setup properties.
   c. Login with the user <*administrator*>.
   d. Select the Advanced Properties page, and search for *secureFileKeystorePasswd*.

      Here you need to update the encrypted password. Type the same password that you entered first time when you logged into the key manager; you would have changed the password. This will generate the encrypted password. Copy this encrypted password and update in this location.
   e. Restart the web server.

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18

Configuring OpenSearch Dashboards

18.1 Understanding OpenSearch Dashboards

PeopleSoft Insights is PeopleSoft's brand for visualizations and analytics driven by search framework. Currently, PeopleSoft Insights uses Oracle’s OpenSearch Dashboards for visualizations and analytics. PeopleTools is integrated with the supported versions of Oracle’s OpenSearch and OpenSearch Dashboards.

The components that you need to install and configure for search framework, analytics, and visualizations vary depending upon which PeopleTools release your update image is built on.

PeopleTools 8.63 supports OpenSearch and OpenSearch Dashboards.

This documentation, and some labels in the user interface, are updated to reflect the transition to OpenSearch for search framework and OpenSearch Dashboards for PeopleSoft Insights. Some of the examples you see in this documentation may not reflect what you see in your environment.

See PeopleSoft Search and Insights Home Page (Document ID: 2205540.2) on My Oracle Support for more information. The Move to OpenSearch page includes an OpenSearch FAQ and explanations of when to expect changes to the user interface.

OpenSearch Dashboards is a web application and works with OpenSearch.

PeopleSoft Insights provides visual reports (visualization) in the form of charts, tables, and so on, based on queries that you set up on OpenSearch indexes.

A visualization is first created in OpenSearch Dashboards 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 OpenSearch Dashboards, which should be imported into PeopleSoft.

PeopleSoft users with the Search Administrator role perform 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 support information on PeopleSoft Search and Insights Home Page (Article ID KA592).

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

18.2 Prerequisites

PeopleSoft Search Framework enables you to create visualizations in PeopleSoft Insights based on PeopleSoft application data indexes in OpenSearch.

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

- PeopleTools 8.63 is installed.

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- the supported search engine is installed and running for the version of PeopleTools used.

  The application search definitions are deployed and indexes are built.

- the support analytics engine is installed and running for the version of PeopleTools used.

  On the Search Instance Properties page, enter the OpenSearch Dashboards server details.

FSCM OpenSearch Dashboards (DB) are delivered by the related product application.

For the Dashboard's (DB) to work:

- Each DB's required search definition(s) must be deployed.
- Each DB's required search definition(s) must crawl successfully.

The following table lists the FSCM products that deliver dashboards and reference to instructions to configure the dashboards:

FSCM Product	Reference to Online Help
Asset Management	See Asset Lifecycle Management, PeopleSoft Asset Management, Using OpenSearch Dashboards for Asset Management.
Billing	See PeopleSoft Billing, Analyzing Billing Data using OpenSearch Dashboards.
Contracts	See PeopleSoft Contracts, Using OpenSearch Dashboards for Contracts.
Expenses	See PeopleSoft Expenses, OpenSearch Dashboard in Expenses, Analyze Expense Data using OpenSearch Dashboards.
General Ledger	See PeopleSoft General Ledger, OpenSearch Dashboards in General Ledger, Using OpenSearch Dashboards in General Ledger.
Inventory	See PeopleSoft Inventory, Analyzing Inventory Using OpenSearch Dashboards, Analyzing Inventory Data using OpenSearch Dashboards.
Payables	See PeopleSoft Payables, Using the OpenSearch Dashboards, Using the OpenSearch Dashboards for Payables.
Projects	See PeopleSoft Project Costing, Using the Project Analytics Dashboards in OpenSearch Dashboards, Analyzing Project Costing Information Using OpenSearch Dashboards.
Purchasing	See PeopleSoft Purchasing, Using OpenSearch Dashboards for Purchasing.
Receivables	See PeopleSoft Receivables, Using OpenSearch Dashboards for Receivables.
Work Order Management	See PeopleSoft Maintenance Management, Working with OpenSearch Dashboards for Maintenance Management.

Use the reference to the specific product documentation from the preceding table to gather the following information for your specific needs:

- Dashboard Name(s)
- Search Definition(s) that are needed for the dashboard(s)

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- Default Time Frame for each dashboard

Customers can use the Automated Configuration Manager (ACM) with template = SEARCH_TEMPLATE, and with that, all search definitions are automatically deployed and run controls are automatically created for each search definition.

When using the template, two run controls are generated per search definition that are named as:

- <search definition>_FULL (for full index)
- <search definition>_INCR (for incremental index)

18.3 Verifying the Search Definition Deployment

This step ensures that the configured search engine is up and running, and the delivered index is deployed and working correctly.

To verify:

1. Test if OpenSearch is active.

   To test:

   a. Select PeopleTools, Search Framework, Administration, Define Search Instance, and search for the search instance.

   b. Select Ping to ensure the search instance is active.

   > **Note**
   >
   > The message will indicate what version of OpenSearch is being used.

2. Next, ensure that the search definition is deployed by following these steps:

   a. Select PeopleTools, Search Framework, Administration, Deploy Search Objects.

   b. On the Deploy Search Definition page, under the Deploy Status column, verify that the required search definition (s) are deployed. The required search definition must be deployed for OpenSearch Dashboard to work properly.

   c. Verify if the crawl is successful. It shows the last date (or time) crawled.

   > **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.

3. If necessary, schedule search index build for each search definition by following these steps:

   a. Select PeopleTools, Search Framework, Administration, Schedule Search Indexes.

   b. Select Add a New Value tab.

   c. Enter *<search definition>_FULL* as the run control ID.

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> **Note**
>
> If <*search definition*>_*FULL* is already available, select from the search results.

> **Note**
>
> run controls with names containing_*FULL* and _*INCR* are generally created using the ACM search template mentioned above.

d. On the Build Search Index page, search for 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 all indexes.

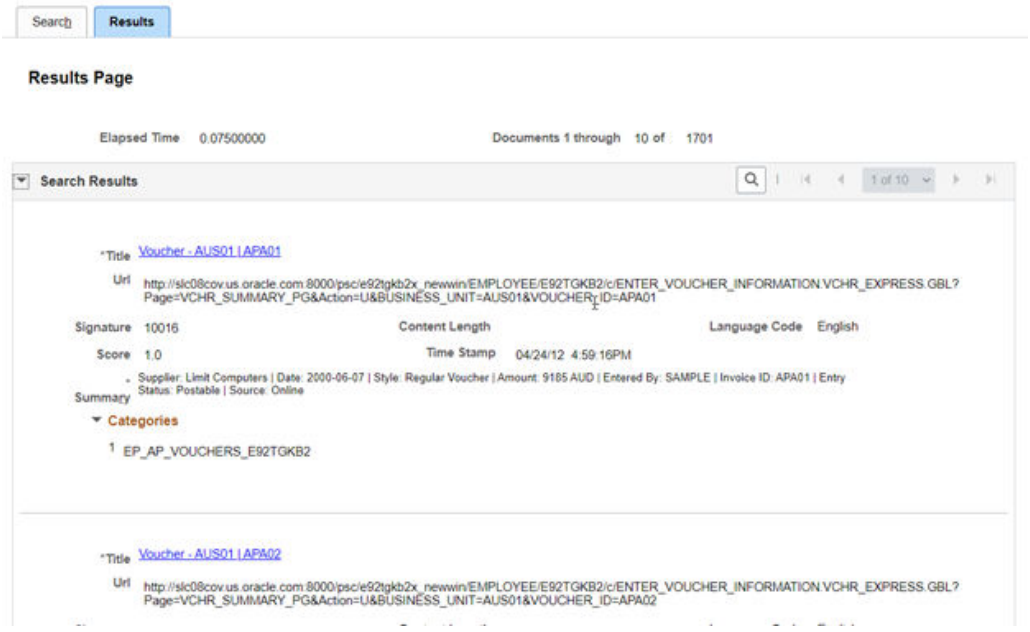
4. Next, test if the index is populated by following these steps:

   a. Select PeopleTools, Search Framework, Utilities, Search Category Tests.

   b. On the Search page, in the group box Search Category to Search, select Name = <*search definition*>. Then press the SEARCH push button.

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

Figure 18-1 Accounts Payable- Vouchers Successfully Indexed



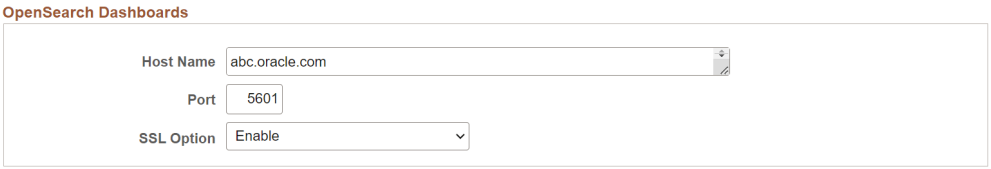
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5. Next, find the correct URL information to ping OpenSearch Dashboard by following these steps:

   a. Select PeopleTools, Search Framework, Administration, Define Search Instances.

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

Figure 18-2 OpenSearch Dashboards Group Box

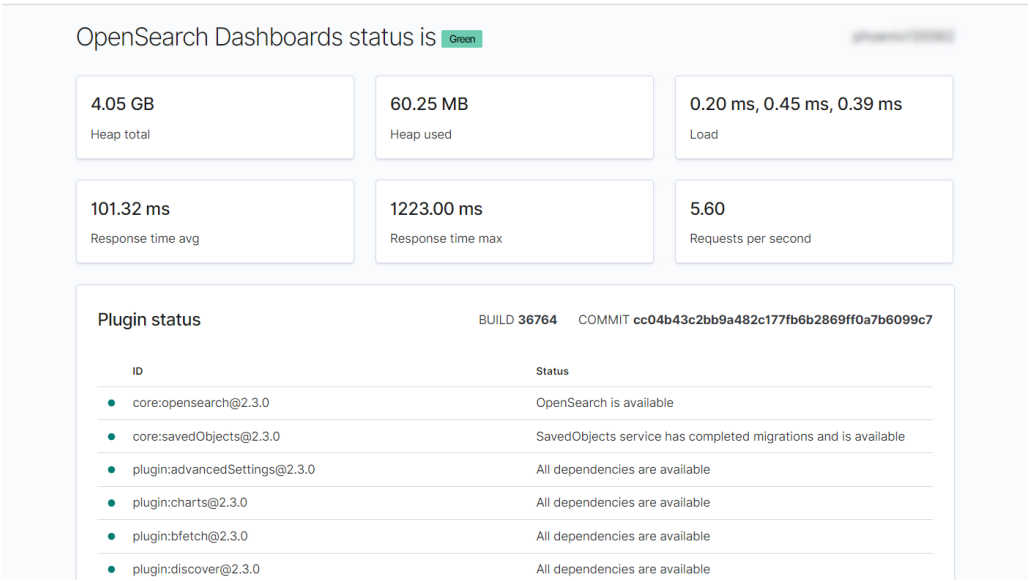


   c. Build the OpenSearch Dashboards URL to ping using this host name and port number.

```
abc.us.oracle.com:5601/status
```

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

Figure 18-3 OpenSearch Dashboards Status



18.4 Deploying OpenSearch Dashboards

This section is an example on how to deploy OpenSearch Dashboards, and provides instructions to deploy OpenSearch Dashboards for Accounts Payable.

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> **Note**
>
> The steps for deploying OpenSearch Dashboards apply to all delivered Dashboards. Refer to each individual product documentation in the preceding Prerequisites section.

The following table lists some examples of OpenSearch Dashboards that Accounts Payable provides:

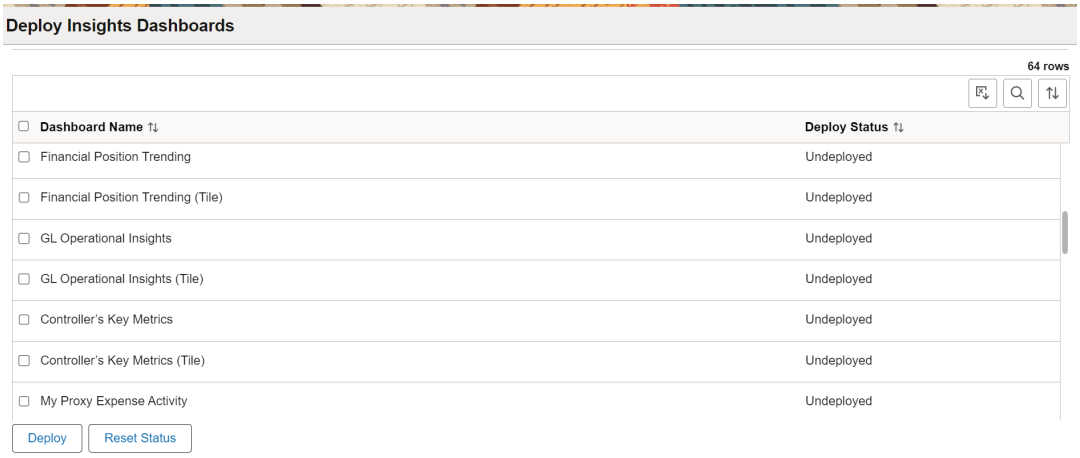
Dashboard Name	Default Time Frame Value (saved with dashboard)
Early Detection and Monitoring	Today so far
Trend Analysis	Last 12 months

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

To deploy the delivered Accounts Payable OpenSearch Dashboards:

1. Select PeopleTools, Search Framework, Administration, Deploy Insights Dashboards.
2. Select all the dashboards, and deploy as shown in the following example:

Figure 18-4 Deploying the Delivered Dashboards



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

Dashboard tiles can then be added to a new homepage or an existing homepage. To add the tile, you can search for <*dashboard name*>.

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.

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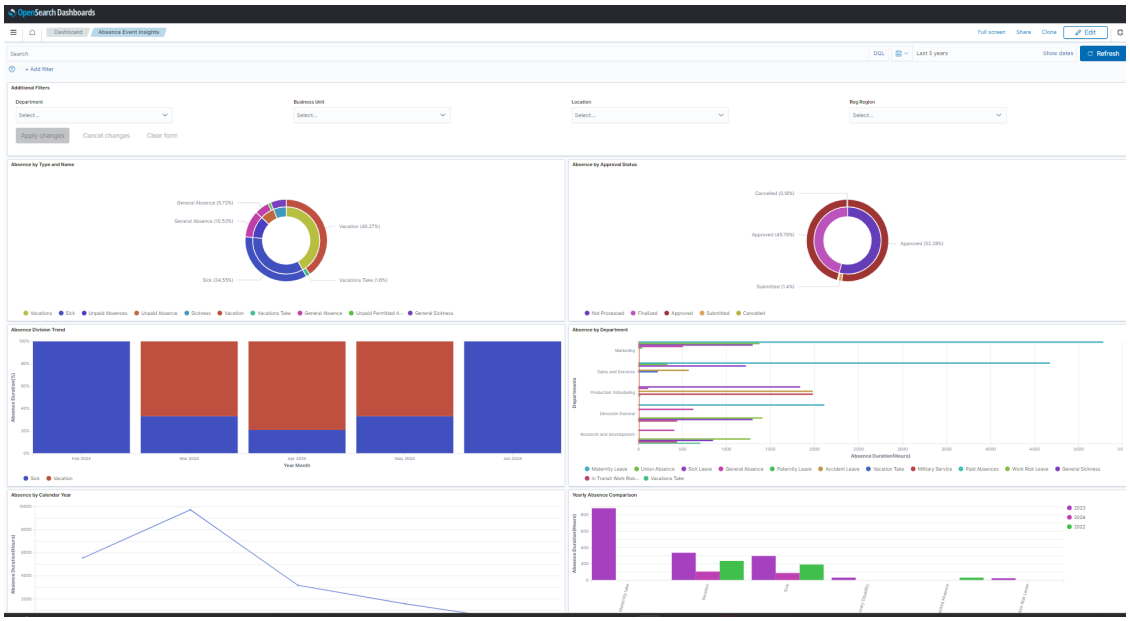
18.5 Reviewing the Dashboards

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

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

> **Note**
>
> In environments that use OpenSearch and OpenSearch Dashboards, the label on this page will change to OpenSearch Dashboards.

Figure 18-5 Visualizer



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A

Applying Common Installation Instructions

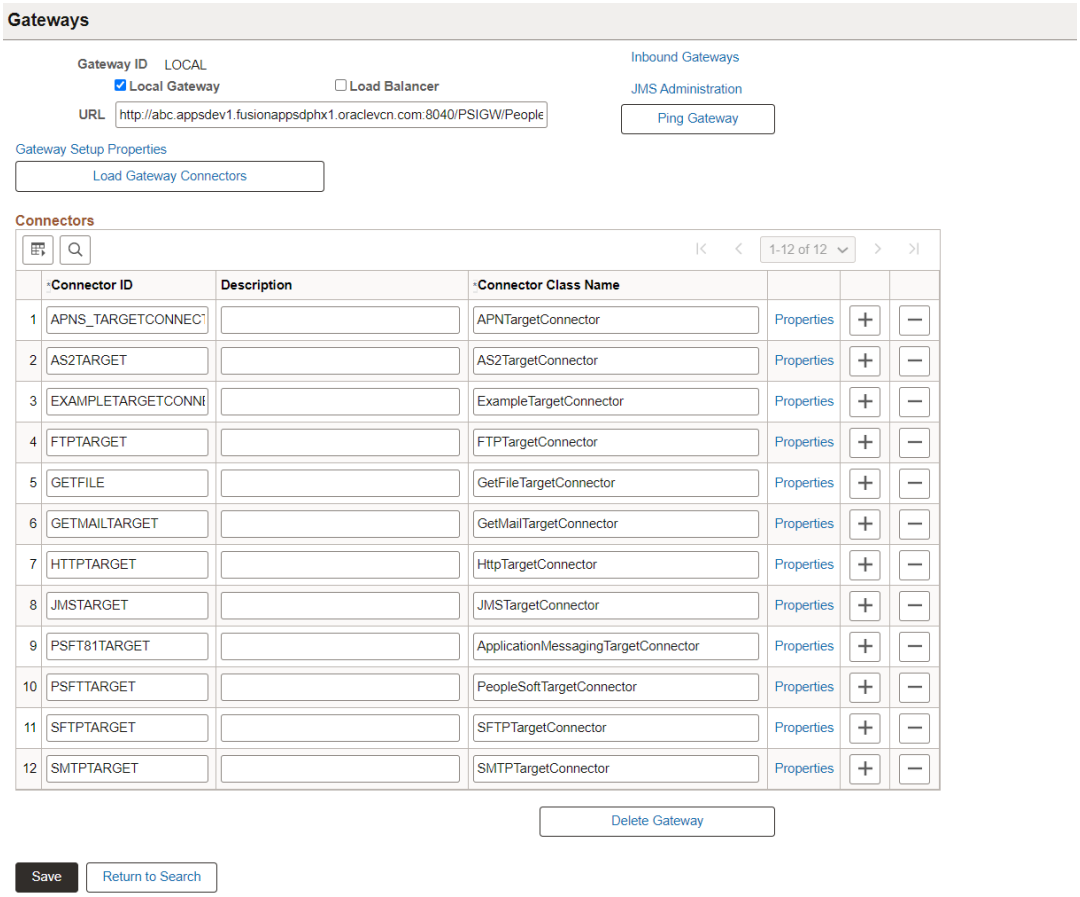
A.1 Setting Up Integration Gateways

To set up integration gateways in PeopleSoft FSCM/HCM environment:

1. In your PeopleSoft FSCM/HCM 9.2 environment, select PeopleTools, Integration Broker, Configuration, Integration Gateways, and click Search.

   The Gateways page for the Local Gateway appears by default, as shown in the following example:

Figure A-1 Gateways page for the Local Gateway



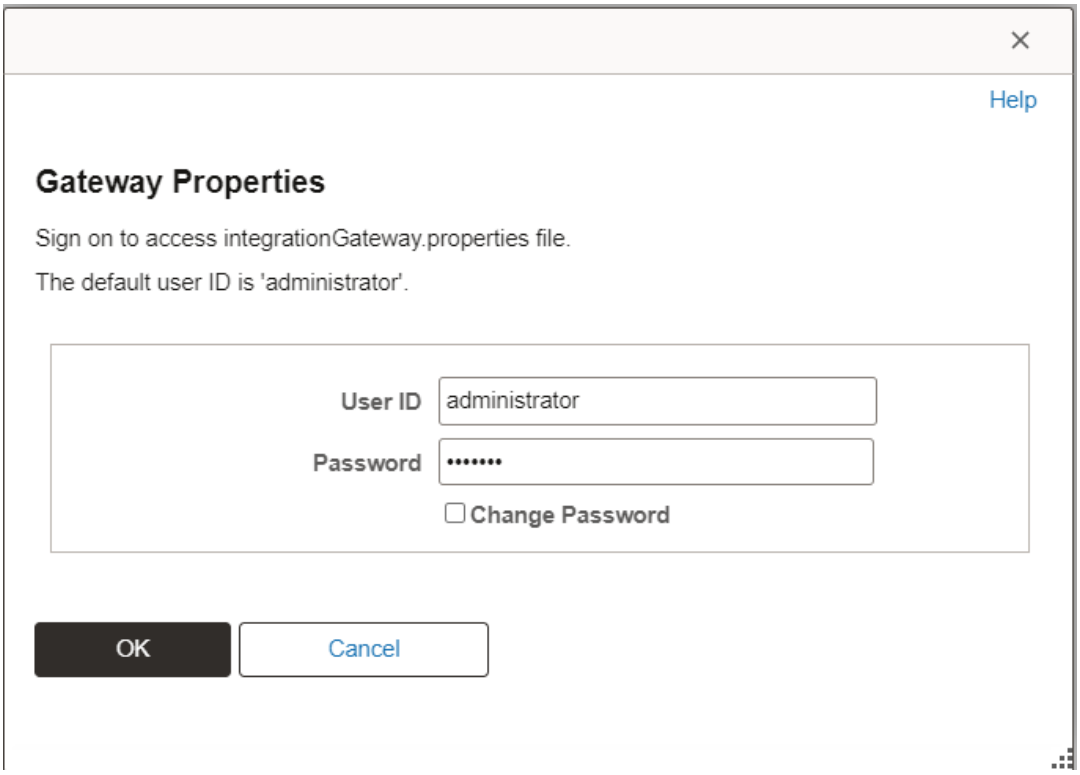
2. On the Gateways page for the local gateway, in the URL field, enter *http://<IBHostname>:<port>/PSIGW/PeopleSoftListeningConnector* for the local gateway URL.
3. Click the Load Gateway Connectors button.
4. Click Save.

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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:

Figure A-2 Gateway Properties signon page



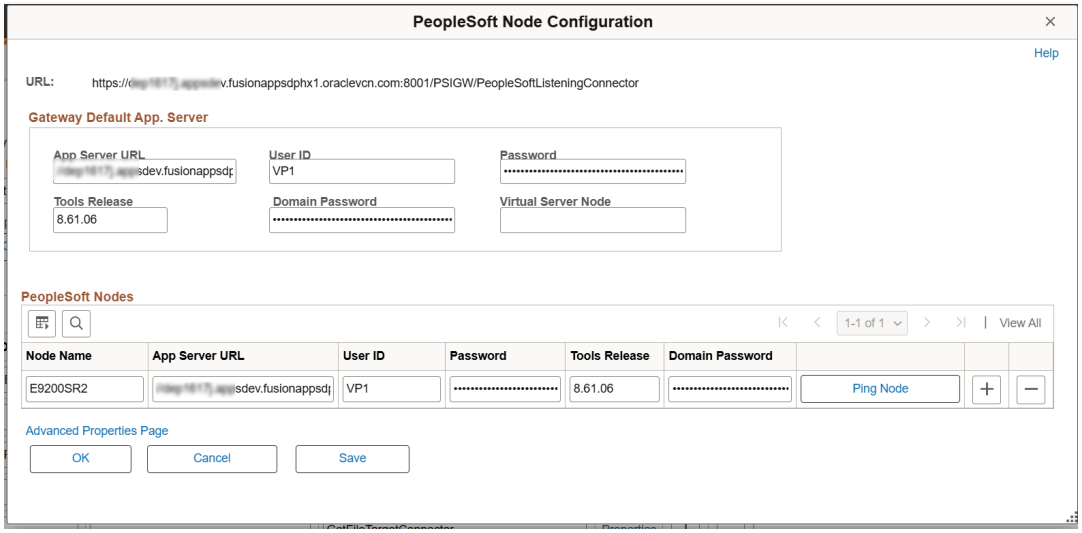
7. On the Gateway Properties signon page, enter the user ID and password for the Integration Gateway.

   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:

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Figure A-3 PeopleSoft Node Configuration page



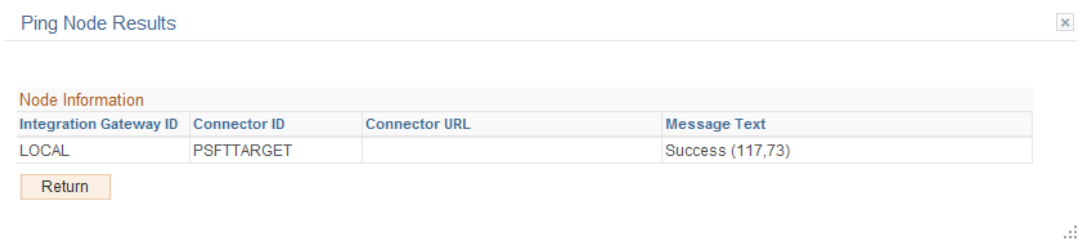
9. On the PeopleSoft Node Configuration page, in the Gateway Default App. Server group box, enter values for the following fields:
   - App Server URL
   - User ID– typically ID of a super user of your system (VP1 in this example).
   - Password– typically password of a super user of your system (VP1 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 8.63; it must match exactly.
12. Click Save.
13. Click the Ping Node button to ping the node (for FSCM PSFT_EP node and for HCM PSFT_HR node) and verify that it is responding.

    If the ping is successful, the Ping Node Results page shows Success in the Message Text column, as shown in the following example:

Figure A-4 Ping Node Results page



14. Click the Return button to return to the PeopleSoft Node Configuration page.

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A.2 Activating the Domain

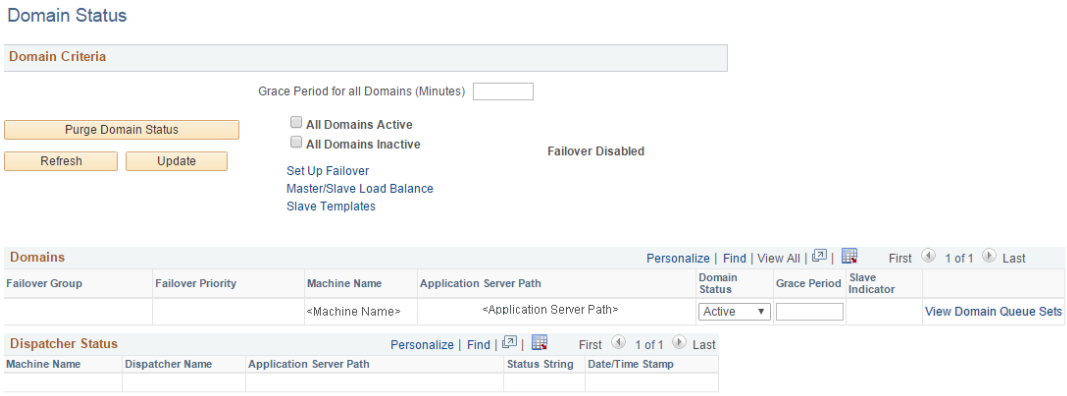
Before activating the local domain in PeopleSoft FSCM/HCM, verify that the PUB server is up and running.

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, Domain Status.

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

Figure A-5 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.

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

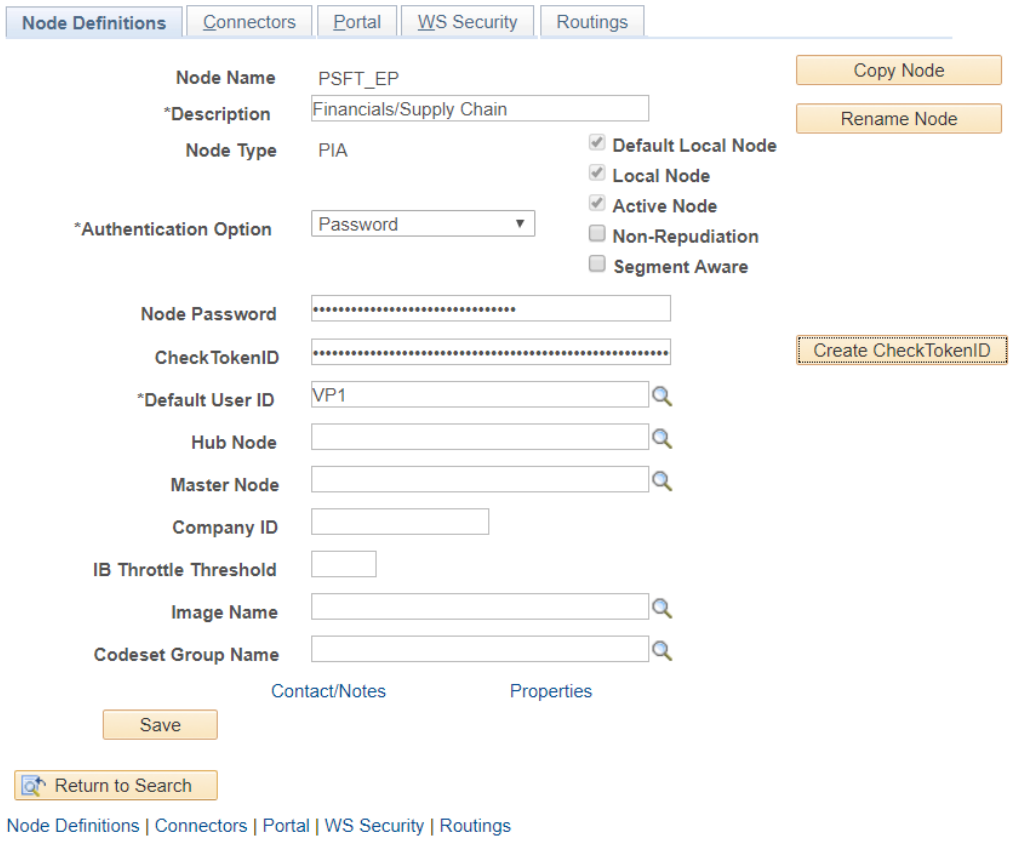
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1. In your PeopleSoft FSCM/HCM 9.2 environment, select People Tools, Integration Broker, Integration Setup, Node Definitions.
2. On the Nodes search page, search for and select the node name. For FSCM, search for *PSFT_EP* and for HCM, search for *PSFT_HR*.

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

> **Note**
>
> The below screenshot is from FSCM environment. For HCM environment, follow the same configuration steps using node name as PSFT_HR.

Figure A-6 Node Definitions page for FSCM - PSFT_ EP Node



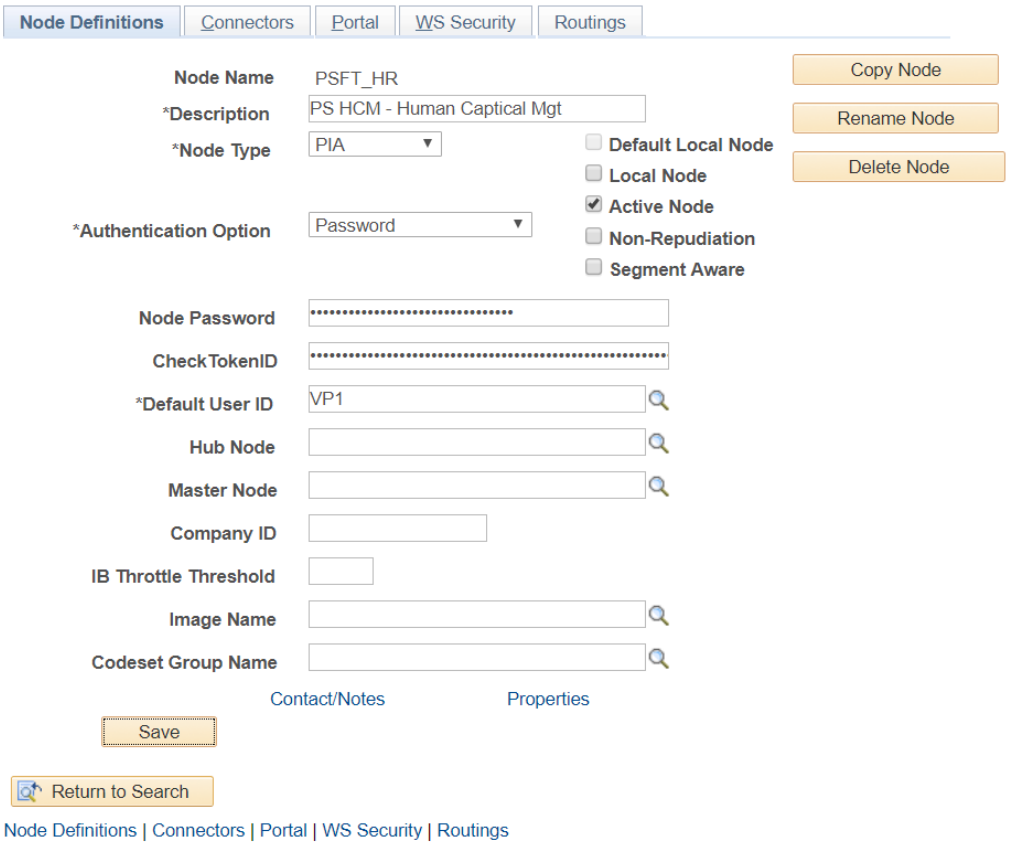
3. On the Node Definitions page, in the Authentication Option field, select *Password* from the drop-down list box.
4. In the Node Password field, enter a password.
5. In the Confirm Password field, re-enter the password.
6. Click the Create CheckTokenID button to generate CheckTokenID and note down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

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8. On the Nodes search page, search for and select the node name. For FSCM search for *PSFT_HR* and for HCM search for *PSFT_EP*. Below screenshot is from FSCM environment (replace with PSFT_EP in HCM environment).

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

Figure A-7 Node Definitions for HCM - PSFT_HR node



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

A.4 Setting Up Portal Nodes

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.

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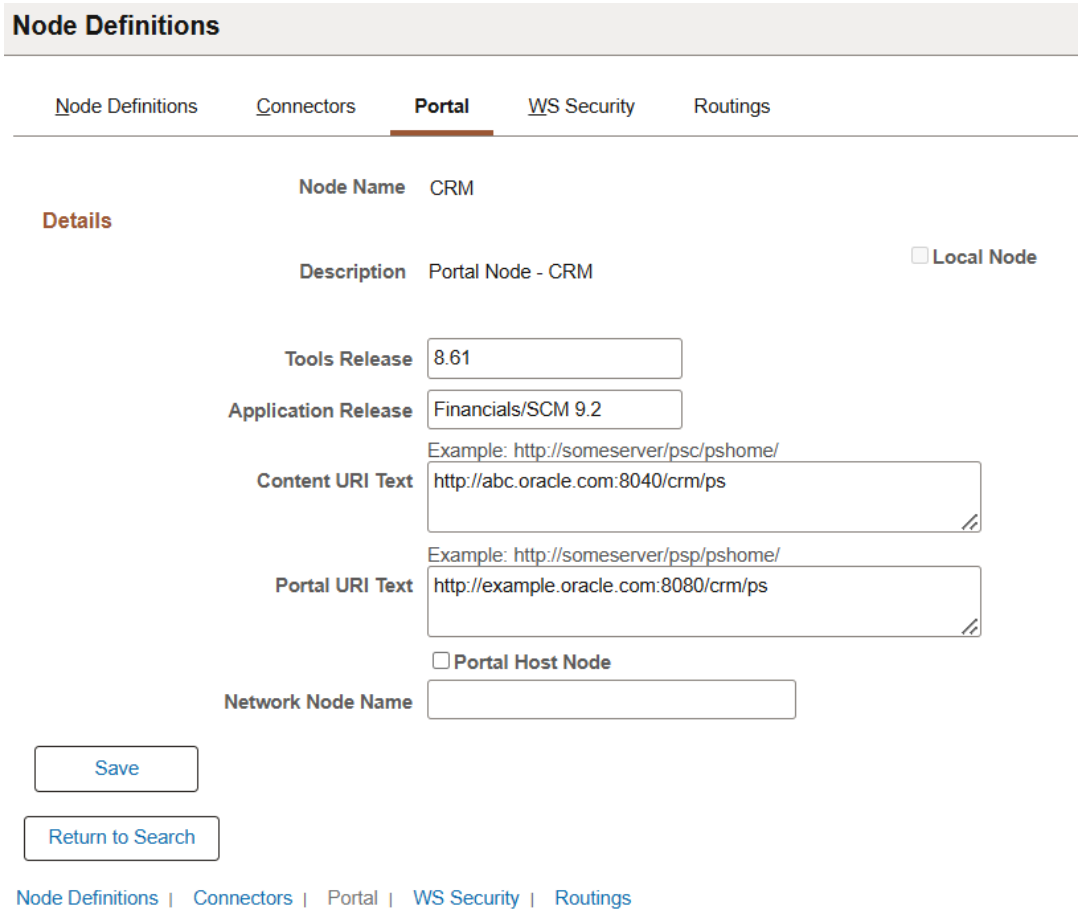
HRMS is the local node in PeopleSoft HCM. FSCM also exists in PeopleSoft HCM and must be set.

A.4.2 Setting Up Portal Nodes in PeopleSoft FSCM/HCM

To set up portal node definitions in the PeopleSoft FSCM/HCM environment:

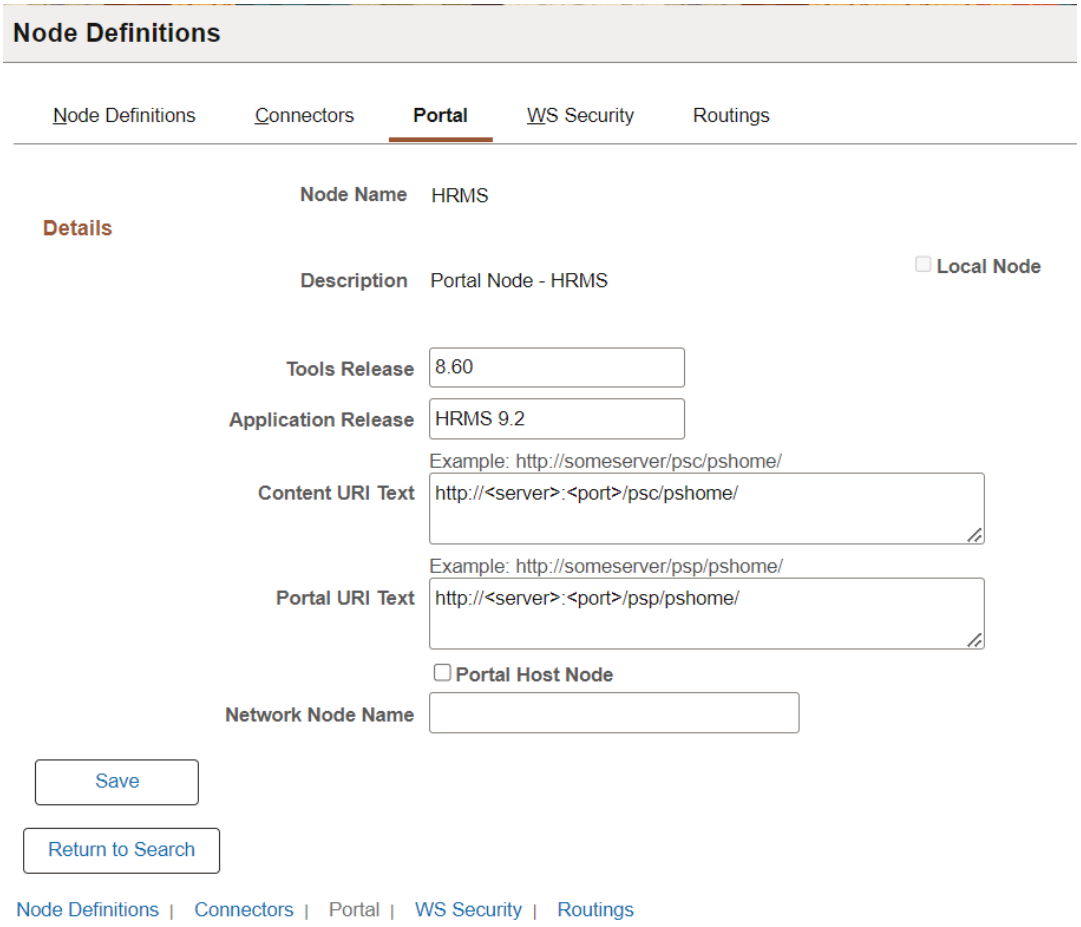
1. In your PeopleSoft FSCM 9.2 environment, select PeopleTools, Integration Broker, Integration Setup, Node Definitions.
2. On the Nodes search page, search for and select the node name. For FSCM, select *ERP* and for HCM, select *HRMS*.
3. On the Node Definitions page, select the Portal tab to access the Portal page for the ERP/HRMS node, as shown in the following example:

Figure A-8 Portal Node page for FSCM - ERP node



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Figure A-9 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.

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