

PeopleSoft Human Capital Management 9.2 Installation



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PeopleSoft Human Capital Management 9.2 Installation,

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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) supplier, the network administration documentation provided by your network supplier, 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, 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 Human Capital Management (HCM), you need both the PeopleSoft PeopleTools installation and the additional instructions provided for installing PeopleSoft HCM.

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

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 conventions described in the following table are used in this documentation:

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

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

Products

This documentation may refer to these products and product families:

- Oracle® 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 Interaction Hub
- Oracle's PeopleSoft Staffing Front Office
- Oracle's PeopleSoft Supply Chain Management

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

Related Information

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

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

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

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

www.peoplesoftonlinehelp.com

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.

1

Installing PeopleSoft HCM 9.2 Applications

1.1 Preparing for the Installation

1.1.1 Verifying the PeopleSoft PeopleTools Version

To run PeopleSoft HCM 9.2, you must be using PeopleSoft PeopleTools 8.62.09.

1.1.2 Verifying the Authentication Domain Configuration Setup

Authentication Domain Configuration is required in order to enable related actions in various products in PeopleSoft HCM.

To set up Authentication Domain Configuration, see the PeopleSoft PeopleTools product documentation.

See *PeopleTools: Portal Technology*, "Understanding the PeopleSoft Related Content Framework."

Note

The Demo (DMO) version that is shipped to customers does not have this Authentication Domain setup configured by default.

1.1.3 Verifying the Demo Database Size

The following table lists the minimum PeopleSoft HCM 9.2 Demo database size for each RDBMS platform:

RDBMS Platform	Approximate Database Size
Oracle — ANSI	42 GB
Oracle — Unicode	42 GB
DB2 z/OS — EBCDIC	55 GB
DB2 z/OS — Unicode	45 GB
Microsoft SQL Server — ANSI	32 GB
Microsoft SQL Server — Unicode	42 GB

Note

You may need to edit this Demo database size for some operating system platforms, based on the default page size.

1.1.4 Reviewing Software Package Requirements for PeopleSoft HCM

Directory Interface enables PeopleSoft applications to authenticate users and synchronize data with LDAP directory services, such as Microsoft Active Directory. While user authentication can occur directly through the directory server, Directory Interface offers enhanced features for maintaining data consistency between PeopleSoft HCM and the directory. Installing Directory Interface with PeopleSoft HCM is optional but recommended to centralize identity management and ensure accurate, real-time employee information.

See Installing Directory Interface.

1.1.5 Reviewing COBOL Requirements for PeopleSoft HCM

The following table lists the PeopleSoft HCM 9.2 products for which COBOL is required:

Product	COBOL Requirements
Absence Management	Required
Base Benefits	Conditionally Required for: Leave Accrual processing and Benefits Billing.
Benefits Administration	Required
Cobra Administration	Required
Global Payroll Core	Required
Global Payroll for Argentina	Required
Global Payroll for Australia	Required
Global Payroll for Brazil	Required
Global Payroll for China	Required
Global Payroll for France	Required
Global Payroll for Hong Kong	Required
Global Payroll for India	Required
Global Payroll for Japan	Required
Global Payroll for Malaysia	Required
Global Payroll for Mexico	Required
Global Payroll for New Zealand	Required
Global Payroll for Singapore	Required
Global Payroll for Spain	Required
Global Payroll for Switzerland	Required
Global Payroll for United Kingdom	Required
Global Payroll for United States	Required

Product	COBOL Requirements
Human Resources	Conditionally Required for: Festive Advances, Federal HCM Central Personnel Data File processing, Education and Government, Commitment Accounting, Tenure, Flexible Service, and Faculty Events processing.
Payroll Interface	Required
Payroll for North America	Required
Pension Administration	Required

Note

COBOL is not required for PeopleSoft PeopleTools or for applications that contain no COBOL programs. If one of the products in your application contains COBOL programs, then you need to purchase a COBOL compiler.

See PeopleSoft Enterprise Frequently Asked Questions About PeopleSoft and COBOL Compilers, My Oracle Support, Article ID KB696014.

The following table lists COBOL compilers by operating system:

COBOL Compiler	Operating System
Visual COBOL	Microsoft Windows, UNIX, Linux
IBM COBOL for AIX	AIX
IBM Enterprise COBOL for z/OS	z/OS

For more information on COBOL see the PeopleSoft PeopleTools installation documentation.

See the PeopleSoft 9.2 Application Installation for your database platform and current PeopleTools release, "Installing and Compiling COBOL on UNIX."

See the PeopleSoft 9.2 Application Installation for your database platform and current PeopleTools release, "Installing and Compiling COBOL on Windows."

1.1.6 Reviewing PeopleSoft HCM Optional Software Packages for Additional Component Applications

The following table lists optional software packages for PeopleSoft HCM 9.2 applications and additional component (third-party) applications.

This table only includes the products that have designated optional software packages. Applications that are not listed do not have designated optional software packages.

In the optional software packages for additional component applications table:

- "O" indicates optional software packages that the corresponding PeopleSoft application supports.
- "NA" indicates Not Applicable.
- "C" indicates Conditionally Required.

See the notes below the table for more information.

PeopleSoft Product	Visio 2016	TimeClock Plus	Dormakaba
eBenefits	NA	NA	NA
Human Resources	O	NA	NA
Pension Administration	NA	NA	NA
Talent Acquisition Manager ¹	NA	NA	NA
Time and Labor	NA	O	O

¹ For more information on Talent Acquisition Manager, see the PeopleSoft product documentation.

See *PeopleSoft HCM: PeopleSoft Talent Acquisition Manager*.

1.1.7 Installing PeopleSoft PeopleTools and PeopleSoft Application Software

PeopleSoft applications built on PeopleTools 8.62 are delivered as deployment packages (DPKs), which include the installation files for both the PeopleSoft 9.2 application and PeopleSoft PeopleTools 8.62.

For information on obtaining and installing PeopleSoft applications,

See PeopleSoft 9.2 Application Installation for your database platform and for your current 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 PeopleSoft PeopleTools 8.62 Installation and Implementation Home Page, My Oracle Support, Article ID KA602.

1.1.8 Running the HCINSSYS.DMS Script

Using PeopleSoft Data Mover, run this script only on the HCM system (SYS) database. You can find the HCINSSYS.DMS script in <PS_APP_HOME>\scripts. After running this script, you must log off all clients, then shut down and restart all application servers for the changes to take effect.

1.1.9 Verifying the EDM Pool Size for DB2 z/OS

The PeopleSoft installation procedure places all of the tables for the product that you are installing into multiple physical DB2 z/OS databases, using a shared tablespace methodology. Depending on the application that you are installing, the DB2 subsystem should have a minimum EDM pool size of 6 MB for PeopleSoft HCM 9.2.

1.1.10 Modifying the PeopleSoft PeopleTools Install for DB2 z/OS

Modifying the Steps to Import Data

For DB2 z/OS, when installing PeopleSoft HCM 9.2, the order of steps that you perform in the chapter "Creating a Database" of the PeopleSoft PeopleTools installation guide changes if you are installing a Demo (DMO) database.

See PeopleSoft 9.2 Application Installation for Db2 z/OS and for your current PeopleTools release, "Creating a Database."

Before you perform the task *Running PeopleSoft Data Mover Import Scripts*, you must edit the <DBNAME>dbo.dms script. Edit the script <DBNAME>dbo.dms and create two different PeopleSoft DMS scripts from the original.

Note

This modification is necessary because the PeopleSoft HCM 9.2 Demo database has some duplicate data definitions and indexes that you must create before loading the Demo database, to avoid duplicates.

To edit the <DBNAME>dbo.dms script:

1. In <DBNAME>dbo.dms, search for the keyword `hceng1.log`.
2. Cut the portion of the script from the line that contains `hceng1.log` to the end of the script and paste it into a different script called <DBNAME>dbo_2.dms.
3. Save the original <DBNAME>dbo.dms script after removing the portion of script from the line that has the keyword `hceng1.log` to the end of the script.
4. Verify that the original <DBNAME>dbo.dms script only contains the import from `hcengs.db` and that <DBNAME>dbo_2.dms contains the rest of the import and updates.
5. Run the <DBNAME>dbo.dms script in bootstrap mode.

Perform this step by following the instructions in the task *Running PeopleSoft Data Mover Import Scripts*.

See PeopleSoft 9.2 Application Installation for Db2 z/OS and for your current PeopleTools release, "Creating a Database."

6. Use the instructions in the task *Creating Indexes* to run the step to create indexes.
7. Use the instructions in the task *Running PeopleSoft Data Mover Import Scripts* to run the <DBNAME>dbo_2.dms script.

Modifying the Steps to Create Views

DB2 z/OS customers must modify the steps for creating views in the chapter "Creating a Database" in the PeopleSoft PeopleTools installation guide, when installing PeopleSoft HCM 9.2.

See PeopleSoft 9.2 Application Installation for Db2 z/OS and for your current PeopleTools release, "Creating a Database."

Note

This modification is required due to the use of Materialized Query Tables. The associated records are defined in Application Designer as SQL Views and are distinguished from other views by the selection of the Materialized Query Tables checkbox on the Record Type tab. When such records are built in the database, instead of creating views, physical tables are created. Before creating these tables, you must specify a valid database and tablespace for each such record.

In the task Creating PeopleSoft Views, you are given the option of creating views using Data Mover or Application Designer. You must follow the “Creating Views in Application Designer” procedure, with the following modifications:

1. In the Build Execute Options, select “Build script file.”
2. Review the resulting DDL script. You will find a CREATE TABLE statement for each Materialized Query Table.
3. For each CREATE TABLE statement, edit the database and tablespace names as needed.

See Also

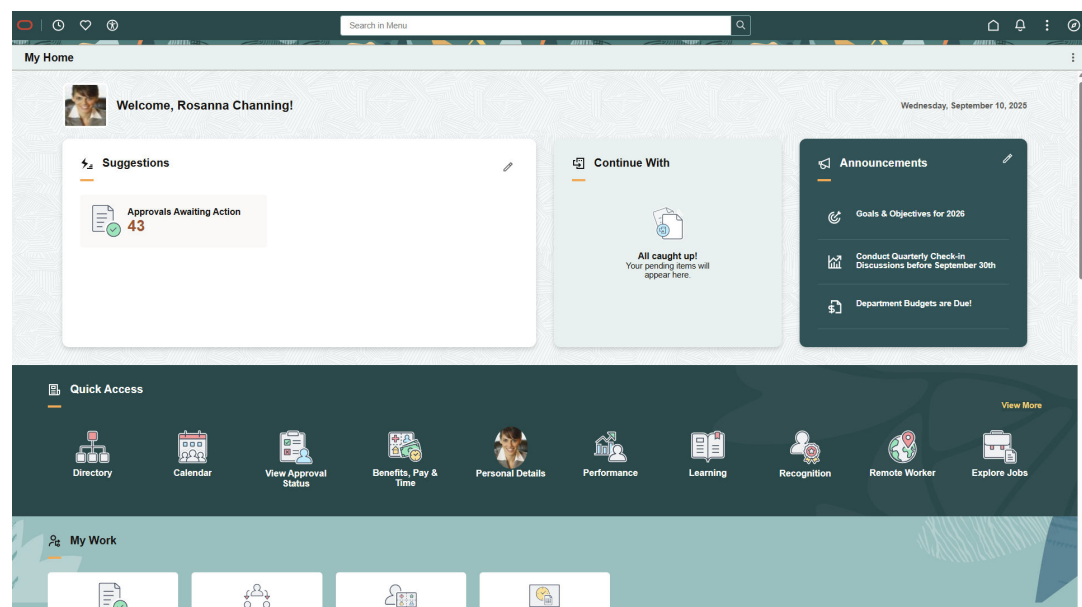
PeopleTools: Data Management, "Running DDDAudits"

1.1.11 Using the Fluid User Interface

When you sign in to your PeopleSoft application, you may see the My Home landing page by default. To access a desired page, from the My Home landing page:

1. On the My Home landing page, shown in this example, select (press) the Global Search bar on the banner.

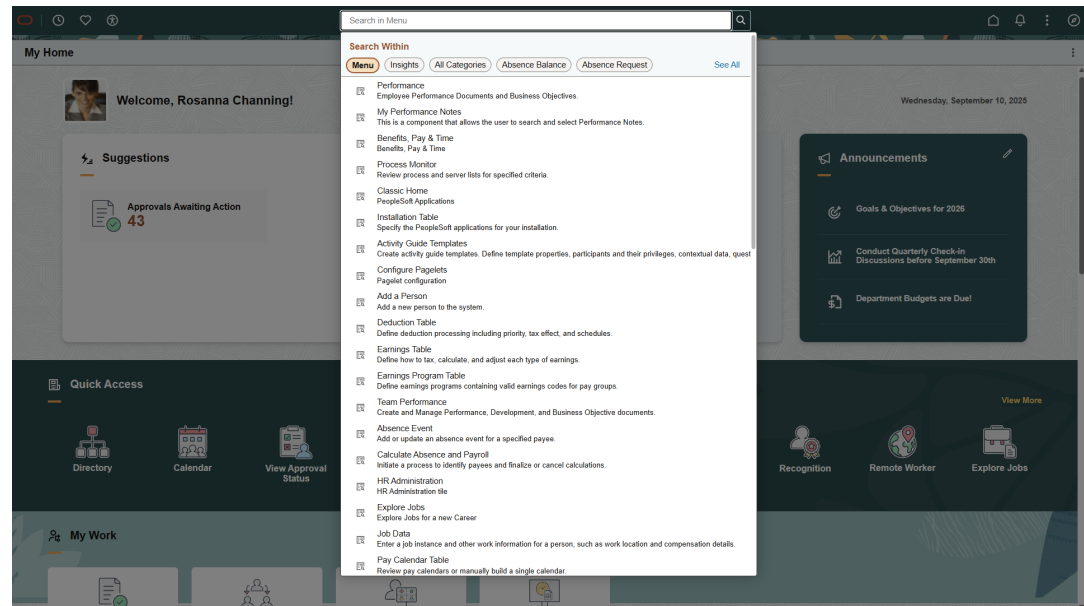
Figure 1-1 My Home landing page



The search suggestions for Menu appear.

2. Select a search suggestion or enter a search term, such as Installation Table or Data Federalization. As you type, the suggestions are updated to reflect the search term or terms you have entered.

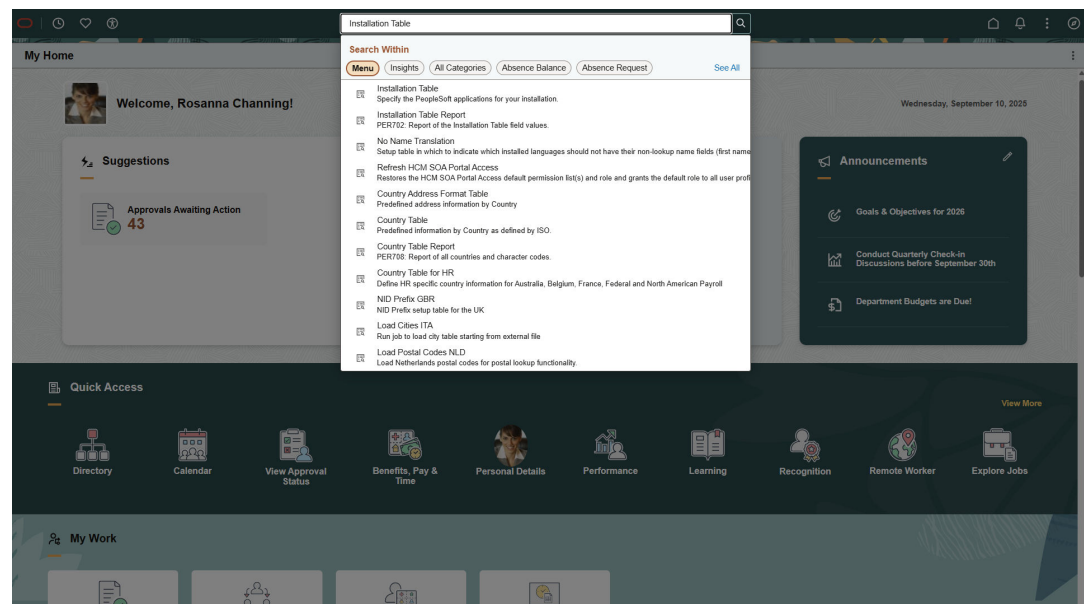
Figure 1-2 Keyword input field with search suggestions for Menu



The search suggestions for your searched term are displayed.

3. Select the desired item from the search suggestions to navigate directly to it.

Figure 1-3 Search suggestions displayed for searched term



Alternatively, you can also use the NavBar button in the top right of the fluid page banner to navigate to a desired page.

See Also

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

PeopleTools: Fluid User Interface Developer's Guide

1.2 Updating the Installation Table

After you create the database and install PeopleSoft Pure Internet Architecture, you must complete this step to ensure that only the products for which you are licensed are active in the installation.

To update the installation table:

1. Enter Installation Table in the keyword input field of the Global Search bar. As you type, the suggestions are updated to reflect the search term or terms you have entered.
2. Select Installation Table from the search suggestions.

Note

To navigate to the page using the NavBar button, select Set Up HCM, Install, Installation Table.

3. Deselect the check boxes for the products that you are not entitled to use.

1.3 Installing PeopleSoft HCM for Federal Government

This section details the system data setup process that you should use when installing PeopleSoft HCM for the U.S. Federal Government to ensure proper installation of Federal functionality.

Note

Run these steps against both the SYS and DMO databases.

To install Federal functionality in a PeopleSoft HCM database:

1. Enter Data Federalization in the keyword input field of the Global Search bar. As you type, the suggestions are updated to reflect the search term or terms you have entered.
2. Select Data Federalization from the search suggestions.

Note

To navigate to the page using the NavBar button, select Set Up HCM, Product Related, Workforce Administration, Workforce Data USF, Data Federalization.

- Click the Federalize System Data button, to load the contents of the core tables that contain the Federal Data.

When you run the Federalization process, you introduce changes to the Installation Table. The following example shows the informational message that appears “The database was federalized at 2025-06-26-22.46.56.000000. You must restart the application server for certain values to take effect.”

Figure 1-4 Data Federalization Process Page

Data Federalization Process

Set Federal Data
The database was federalized at 2025-06-26-22.46.56.000000. You must restart the application server for certain values to take effect.

Set Commercial Data
By selecting this Button, all the data in the following list of tables will be reset to Commercial data.

Data Tables

Table Name	Description
ACTION_TBL	Action Setup Table
ACTN_REASON_TBL	Action/Reason Combinations
BAS_EVT_CLASS	Benefits Administration Event Classification Table
CITIZEN_STS_TBL	Citizen Status Table
COVRG_CD_TBL	Coverage Code Definition Table
COVRG_RULE_TBL	Coverage Code Rule Table
ERN_PROGRAM_TBL	Earnings Program Table Description
ETHNIC_GRP_TBL	Ethnic Group Code Table
INSTALLATION	Site-Specific Install Options
MAJOR_TBL	College Instructional Program Code Table
PSXLATITEM	Translate Value Items

- Log off all clients, shut down all application servers, and delete application server cache.
- Restart all application servers, and then log back on to PeopleSoft HCM for your changes to take effect.
- Select Set Up HCM, Install, Installation Table, and then select the HCM Options tab to access the HCM Options page.

Ensure that the Federal values and settings are set as follows:

- On the HCM Options tab, verify that the Position Management Option radio button is set to *Full*.
 - In the Compensation Rate Codes group box, verify that the Multi-Step Grade check box is selected.
- Select the Product Specific tab to access the Product Specific page.
 - On the Product Specific page, verify that the Default Pay Basis is set to *Per Annum*.

1.4 Installing PeopleSoft HCM for Education and Government

If you use PeopleSoft Human Resources for Education and Government, verify that the Education and Government setting is enabled on the Installation Table. This enables access to specific Education and Government functionality.

To enable access to specific Education and Government functionality:

- Enter Installation Table in the keyword input field of the Global Search bar. As you type, the suggestions are updated to reflect the search term or terms you have entered.

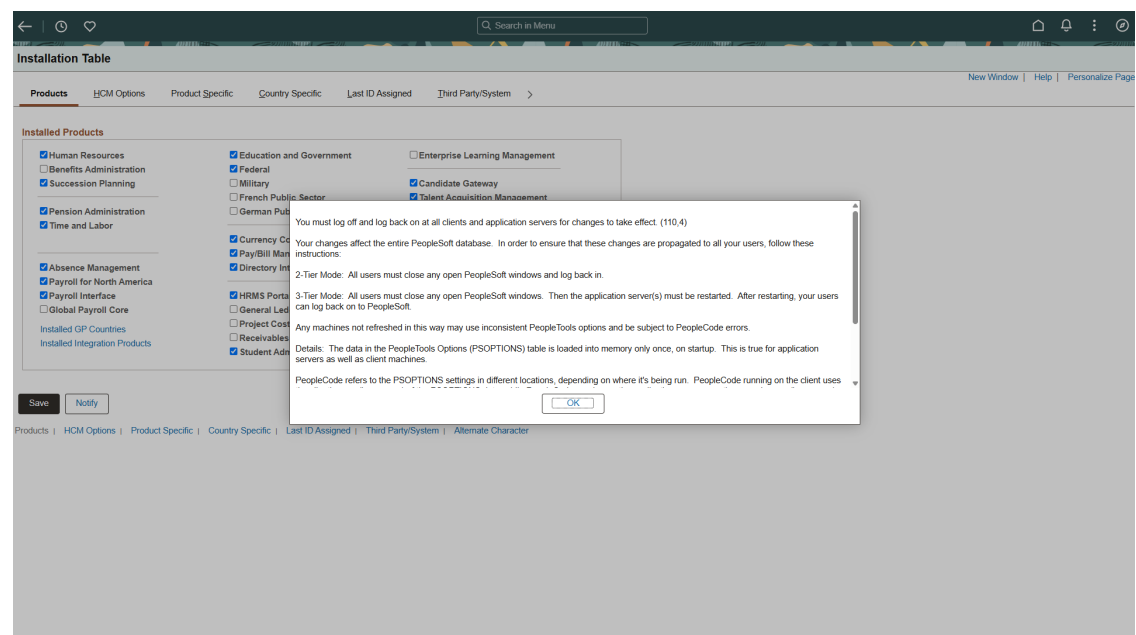
2. Select Installation Table from the search suggestions.

Note

To navigate to the page using the Navbar button, select Set Up HCM, Install, Installation Table.

3. On the Products page, verify that the Education and Government check box is selected.
4. If any changes are necessary to the Installation Table, this informational message appears, "You must log off and log back on at all clients and application servers for changes to take effect", as shown in the following example:

Figure 1-5 Informational Message



Log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HCM for your changes to take effect.

1.5 Installing PeopleSoft HCM for the Military

1.5.1 Selecting the Military Option in the Installation Table

If you use PeopleSoft Human Resources for the Military, verify that the Military option is enabled on the Installation Table to have access to specific Military Rank processing functionality.

To enable specific Military Rank processing functionality:

1. Enter Installation Table in the keyword input field of the Global Search bar. As you type, the suggestions are updated to reflect the search term or terms you have entered.

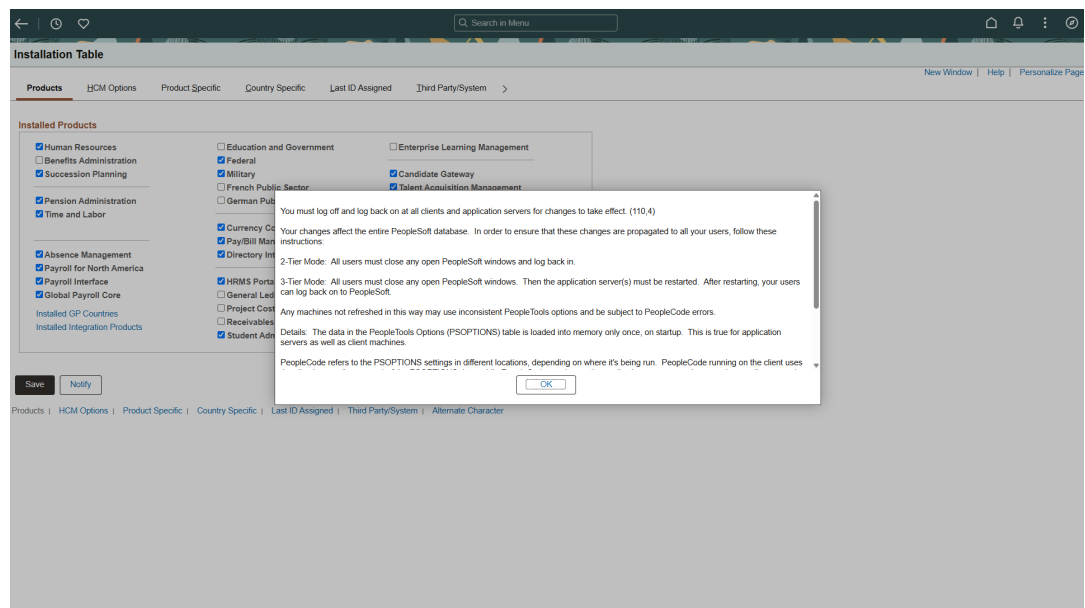
2. Select Installation Table from the search suggestions.

Note

To navigate to the page using the Navbar button, select Set Up HCM, Install, Installation Table.

3. On the Products page, verify that the Military check box is selected.
4. If any changes are necessary to the Installation Table, this informational message appears, “You must log off and log back on at all clients and application servers for changes to take effect”, as shown in the following example:

Figure 1-6 Informational Message



5. Log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HCM for your changes to take effect.

1.5.2 Setting Up the Military Search Dialogs

To ensure that the Military-specific fields appear in the Search Dialogs, perform these steps:

1. In PeopleSoft Application Designer, open Record MIL_SRCH_SBR.
2. For each field in the record, do the following:
 - a. Double-click to open the Record Field Properties dialog.
 - b. Select the Alternate Search key check box.
 - c. Click OK.
The List Box Item check box is automatically selected.
3. Click Save.

1.6 Setting Up PeopleSoft HCM for Japan

1.6.1 Searching by Internal Employee ID

To enable the functionality to search by Other ID in the search views that Oracle delivers:

1. Sign in to PeopleSoft Application Designer.
2. Access and open the subrecord SCRTY_FLD_SBR.
3. Double-click the OTHER_ID_JPN field.
4. Select the Alternate Search key check box.
5. Click OK.
6. Click Save.

1.6.2 Configuring Phone and FAX Number Fields

Phone and fax number fields are custom format fields. If you enter a phone number without any hyphenation (for example: 9256944023), the system automatically reformats the number into the proper format (for example: 925/694-4023). This format feature works for phone numbers in the United States.

In Japan, a ten-digit phone number may be formatted in several ways. For example: 03-1234-5670, 045-123-4567, 0567-21-1234, and so on. Therefore, this format feature does not work for Japanese phone numbers.

To resolve this formatting issue for Japanese phone and FAX numbers, you can modify the definition of the phone number field to an ordinary string field. This stores the data as you entered it, without any automatic formatting. Enter the phone numbers with parentheses or dashes. For example, 03(4567)1234 or 03-4567-1234.

To configure phone and fax number fields by modifying the definition of the phone number field to an ordinary string field:

1. In PeopleSoft Application Designer, open the following fields:
 - FAX
 - HOME_PHONE
 - PHONE
 - PHONE1
 - PHONE2
 - POSITION_PHONE
 - PROXY_PHONE
 - WORK_PHONE
2. For each field in the Field Format group box, change the Format Type drop-down list from *Custom* to *Uppercase*.
3. Click Save.

1.6.3 Printing Japanese Characters on SQR Reports

To print Japanese characters on SQR reports:

1. Open `<PS_APP_HOME>\sqr\setenv.sqc` for editing.
2. In `setenv.sqc`, remove the comment character from (uncomment) the second line:

```
! Print Specific Language
```

```
!#define PRINT_JAPANESE
```

3. Depending on the settings on your operating system, additional changes to the configuration files may also be necessary.

To determine any additional changes, see the product documentation on global reporting.

See *PeopleTools: Global Technology*.

1.7 Setting Up PeopleSoft HR for Switzerland

This section details how to install Swiss address validation.

To import Swiss address data:

1. Using PeopleSoft Data Mover, sign in to the PeopleSoft HCM 9.2 application database.
2. Open the `CHE_ADDR.DMS` script in `<PS_APP_HOME>\scripts\CHE_ADDR.DMS`.

① Note

If you are using a Unicode database, use the `CHE_ADDR_DBCS.DMS` file instead of the `CHE_ADDR.DMS` file. This imports the Swiss address data in a format that is compatible with the double-byte character set.

3. Run this script against the PeopleSoft HCM 9.2 application database.
4. Close PeopleSoft Data Mover.

① Note

The accented characters in the address data are only visible on databases supporting either Unicode or the European character set.

1.8 Creating Time Zone Offsets for PeopleSoft Time and Labor

PeopleSoft PeopleTools stores time and date information in only one time zone- the "Base Time Zone"- that you select at the time of installation and should never change. The base time zone may be set to the time zone of the company headquarters or perhaps to Greenwich Mean Time (GMT), also known as UTC (Coordinated Universal Time).

When employees enter the hours that they worked in PeopleSoft Time and Labor, they report time according to the local time zone and PeopleSoft PeopleTools stores the information in the base time zone. The Time Administration process then converts the base time back to the local time for rules processing.

To do this, the system must know the time zone “offsets,” or the differences between the local time and base time. The following steps detail how to select the base time zone and create time zone offsets.

To select the base time zone and create time zone offsets:

1. Select PeopleTools, Utilities, Administration, PeopleTools Options.
2. On the PeopleTools Options page, in the Base Time Zone field, browse to select the time zone in which you want all reported time to be stored.
3. Select PeopleTools, Utilities, International, Define Time Zones.
4. On the Define Time Zones Data page (and Daylight Savings page, if applicable), change the default settings.

The Define Time Zones Data page and Daylight Savings page display the default time zone settings that PeopleSoft PeopleTools delivers. You can change the settings on these pages to customize the information for your organization.

5. On the Define Time Zones Data page, create time zone offsets by clicking the Generate Query Offsets button to populate the time zone offsets table with values that represent the differences between the local and base time zones.
6. Enter the Start and End dates for the offset generation.
 - Specify Start Date: Determine 5 years prior to current date and use year begin date as Start Date.
 - Specify End Date: Determine 5 years in the future, from current date and use year end date as End Date.
7. Click OK.
8. Click Save.

1.9 Installing Absence Management and Global Payroll Core

1.9.1 Verifying Installation Settings for PeopleSoft Absence Management

If you have licensed PeopleSoft Global Payroll Core or PeopleSoft Absence Management, you need a Microsoft Windows Process Scheduler to run the Packager Utilities.

If you use PeopleSoft Absence Management, you should verify that Global Payroll Core is enabled on the Installation Table. This also applies when you are using PeopleSoft Absence Management as a stand-alone product, or in combination with PeopleSoft Payroll for North America or Payroll Interface.

Note

If your application contains COBOL programs, you must purchase a COBOL compiler. Refer to the section in this document titled “Reviewing COBOL Requirements for PeopleSoft HCM” for a list of the products that require COBOL and the supported COBOL compilers.

See Preparing for the Installation.

This step must be run against the SYS database and the DMO database.

If it was necessary to make any changes to the Installation Table, the informational message “You must log off and log back on at all clients and application servers for changes to take effect” appears, as shown in the following example:

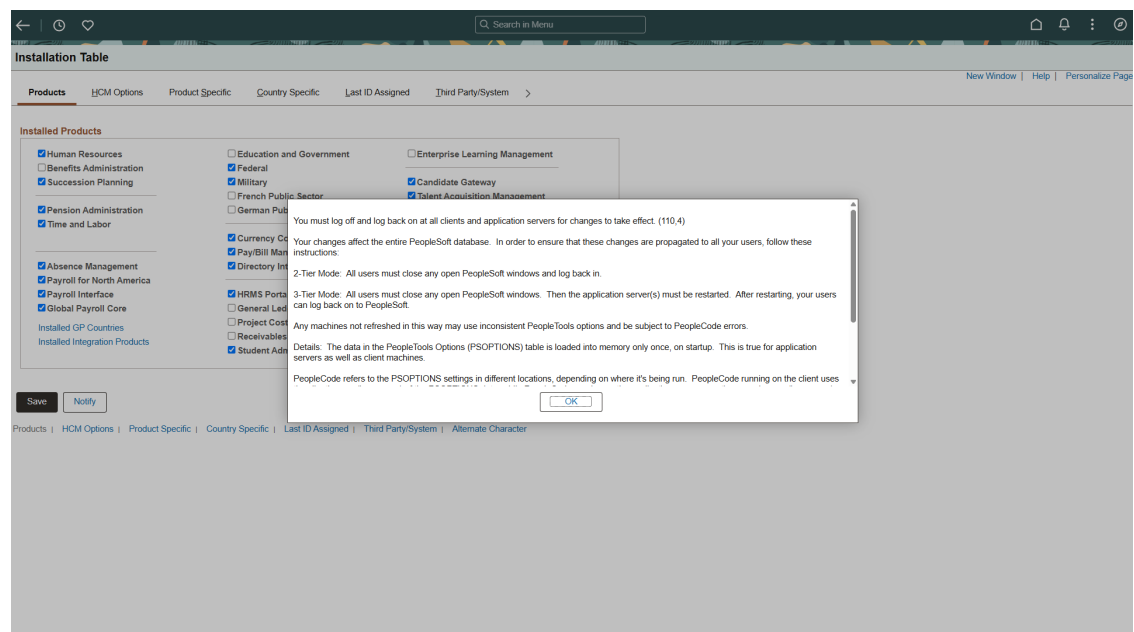
1. Enter Installation Table in the keyword input field of the Global Search bar. As you type, the suggestions are updated to reflect the search term or terms you have entered.
2. Select Installation Table from the search suggestions.

Note

To navigate to the page using the Navbar button, select Set Up HCM, Install, Installation Table.

3. On the Products page, verify that the Global Payroll Core check box is selected.
4. If any changes are performed to the Installation Table, the following informational message appears after saving the page:

Figure 1-7 Informational Message



Log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HCM for your changes to take effect.

1.9.2 Updating Process and Job Definitions for Packager

Understanding Updates for Packager

If you have licensed either PeopleSoft Absence Management or PeopleSoft Global Payroll Core, you must perform this step.

The SQR GP00PK01 and the two PeopleSoft Data Mover processes (GP_EXP, GP_IMP) must be run on a Microsoft Windows Process Scheduler. With PeopleSoft HCM 9.2, job definitions that combine multiple Packager processes are delivered to help streamline the overall process. As a result, the job definitions that contain either the SQR Report or the PeopleSoft Data Mover processes must be scheduled to run on a Microsoft Windows Process Scheduler.

Updating Process Definitions for Packager

You must run these updates on both the SYS and DMO databases.

The following table lists the process definitions that you need to run on a Microsoft Windows Process Scheduler:

Process Type	Process Name
SQR Report	GP00PK01
Data Mover	GP_EXP
Data Mover	GP_IMP

To update the preceding Process Definitions:

1. Select the Processes component by selecting PeopleTools, Process Scheduler, Process Scheduler Processes.
2. On the search page, click the Advanced Search link.
3. Open the component for each of the process types and process names in the preceding list.
4. Select the Process Definition Options tab.
5. In the Server Name field, select the value of the Microsoft Windows Process Scheduler set up at your installation.

Updating Job Definitions for Packager

You need to run the following job definitions on a Microsoft Windows Process Scheduler:

- GPCMPRPT — Rules Package Compare Report
- GPCMPRU — Compare & Upgrade with Report
- GPCRSCTE — Create Package & Scripts & Export
- GPEXP — Export Rule Packages
- GPICMP — Import Rule Package & Compare
- GPICMPRU — Import & Compare & Upgrade with Report
- GPICMPU — Import & Compare & Upgrade
- GPIMP — Import Rule Packages
- GPSCTE — Create Scripts & Export Package

To update the preceding Job Definitions:

1. Select the Jobs component by selecting PeopleTools, Process Scheduler, Process Scheduler Jobs.
2. Open the component for each of the previously listed jobs.
3. Select the Job Definition Options tab.

The Server Name field contains the value *PSNT*.

4. In the Server Name field, select the value of the Microsoft Windows Process Scheduler that you set up at installation.

1.10 Granting Access to Homepage Personalization

This section details how to grant access to the homepage personalization.

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

To add the Portal User Role to the user IDs:

1. Using PeopleSoft Data Mover, sign in to the PeopleSoft HCM 9.2 application database.
2. Open the PeopleSoft Data Mover script `<PS_APP_HOME>\scripts\portal_add_role.dms`.
3. Run this script against the PeopleSoft HCM 9.2 application database.
4. Close PeopleSoft Data Mover.

Note

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

1.11 Installing PeopleSoft Global Payroll Country Extensions

1.11.1 Understanding the PeopleSoft Global Payroll Country Extensions Installation

This section details the additional installation steps that are required to install PeopleSoft Global Payroll Country Extensions.

Note

Complete this section *only* if you are installing one or more PeopleSoft Global Payroll Country Extensions.

The following table lists the abbreviations and terms that are used in this section:

Abbreviation	PeopleSoft Global Payroll Terms
CE	Country Extension
GP	Global Payroll
HRDMO	HCM Demo database
HRSYS	HCM System database

Oracle delivers the objects, rules and data for PeopleSoft Global Payroll Country Extensions as part of the HRDMO databases and not HRSYS databases. The following steps walk you through additional country extension installation actions and requirements.

1.11.2 Updating Installation Indicators

Oracle recommends that you update the PeopleSoft Global Payroll Country Extension indicators on the Installation page on both your HRSYS and HRDMO databases, so that only the Country Extensions that you have licensed are enabled.

1. Enter Installation Table in the keyword input field of the Global Search bar. As you type, the suggestions are updated to reflect the search term or terms you have entered.
2. Select Installation Table from the search suggestions.

Note

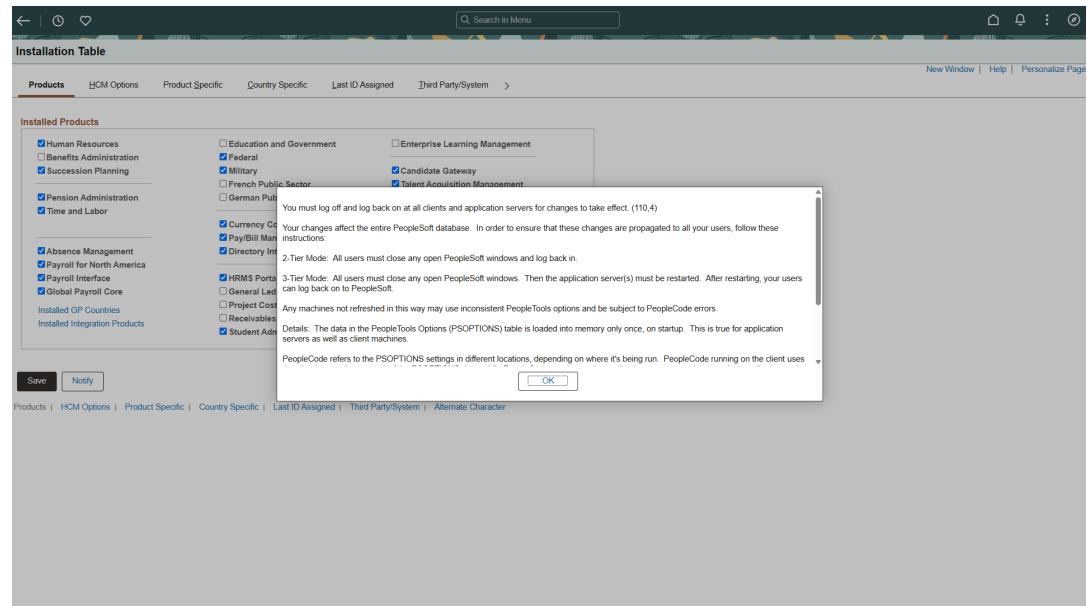
To navigate to the page using the Navbar button, select Set Up HCM, Install, Installation Table.

3. On the Products page, select the Installed GP Countries link (at the bottom) to view a list of countries.
4. Clear the check boxes for all of the Country Extensions that you have *not* licensed (so that the only check boxes selected are for those Country Extensions that you have licensed).

Note

This is important because these indicators are used later in this task to identify if additional updates should be made (they are conditional based according to the Country Extensions that you licensed).

5. If any changes are necessary to the Installation Table, this informational message appears “You must log off and log back on at all clients and application servers for changes to take effect,” as shown in the following example:

Figure 1-8 Informational Message

6. Log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HCM for this change to take effect.

1.11.3 Import Global Payroll Country Extension Rules

From 1st January 2023, some of the Global Payroll and Absence Management Country Extensions have moved to Market Driven Support (MDS). Currently, the Market Driven Support is offered for Australia, France, India, Japan, Malaysia, New Zealand, Singapore, Spain, Switzerland, and United Kingdom.

If the Country Extension installed is part of MDS, the Global Payroll Rules will not exist in the HCM System Databases. To get access to Global Payroll Rules for MDS Country Extensions contact Oracle Support. For all other Country Extensions which are not part of the Market Driven support, the Global Payroll Rules will be available in the installation image.

1.11.4 Updating Stored Installation Indicators

The gpcesys.dms script updates the stored indicators for some elements and activates applicable trigger definitions, based on the Country Extensions that you have licensed.

If you use PeopleSoft Global Payroll, you should run this script, as the updates are conditional based on the Installation Indicators.

Use PeopleSoft Data Mover to run the gpcesys.dms script against both the HRSYS and HRDMO databases. You can find the script in <PS_APP_HOME>\scripts.

1.11.5 Copying HR Rate Codes from the HRDMO to the HRSYS Database

Oracle delivers the GP Rate Code Elements for Country Extensions in both the HRSYS and HRDMO databases. However, the HR Rate Codes that are referenced by these elements are only delivered in the HRDMO database. If you would like to copy the related HR Rate Code elements directly into your HRSYS database for the GP Country Extensions that you have licensed, you can do so by using the gpccrate_exp.dms and gpccrate_imp.dms scripts. These scripts have conditional export/import logic that is based on the Installation Indicators (as

previously discussed) to only copy the referenced HR Rate Codes that are required for the GP Country Extensions that you have licensed.

After you install *both* the HRSYS and HRDMO databases, carry out these steps:

1. Use PeopleSoft Data Mover to run the `gpccrate_exp.dms` script, which you can find in your `<PS_APP_HOME>\scripts` directory, against your HRDMO database.

Note

If you only want to copy HR Rate Codes for a subset of the PeopleSoft Country Extensions that you have licensed, you should modify the `gpccrate_exp.dms` script before running and comment out the export logic for the licensed PeopleSoft Country Extensions that you do not want to copy. By default, only those HR Rate Codes for your licensed PeopleSoft Country Extensions will be exported, based on your Installation Indicators.

2. Use PeopleSoft Data Mover in bootstrap mode to run the `gpccrate_imp.dms` script (in your `<PS_APP_HOME>\scripts` directory) against your HRSYS database (using the `dat` file that was just generated).

Note

If you are running on DB2 z/OS, follow the instructions in the script `gpccrate_imp.dms` to alter it to work properly in your environment.

1.12 Installing PeopleSoft ePay Payslips for PeopleSoft Global Payroll

1.12.1 Understanding the PeopleSoft ePay Payslips Installation

This section details the installation steps for PeopleSoft ePay Payslips (for PeopleSoft Global Payroll). PeopleSoft ePay Payslips for PeopleSoft Global Payroll is dependent on a working FTP server.

Note

The Payslips process may result in a `java.lang.OutOfMemoryError` exception when the number of payees in a single payslip print run gets above 4,000. If this occurs, you can increase the amount of memory that you allocate to java.

See the section *Modifying the Sun JVM Configuration to Increase Heap Size* in this chapter.

1.12.2 Installing the PeopleSoft ePay Payslips Functionality

To install PeopleSoft ePay Payslips for PeopleSoft Global Payroll:

1. Confirm the jar installation by verifying that the following two jar files are installed in your `<PS_APP_HOME>\class` directory:

Note

For a UNIX platform, the class files are in the `<PS_APP_HOME>\appserv\classes` directory.

- itext-1.4.7.jar
 - com.peoplesoft.hmcr.exceptions.jar
2. Update URL IDs in the PeopleSoft system to point to the FTP site.

The URL ID is pointing to a virtual directory on the FTP site. You can create this virtual directory "PAYSLIPS" in the FTP root, however the PeopleSoft ePay process creates this folder if it did not previously exist. You can choose to create a directory by any name or structure (you are not limited to using "PAYSLIPS"). If you create a different directory, you must ensure that you reference this directory in the URL ID.

 - a. Select PeopleTools, Utilities, Administration, Maintain URLs.
 - b. Select the following URL Identifier:
GP_SS_PSLP_FTP
 - c. Update this URL with the FTP payslip URL, including the user ID used to log on to the FTP session, password, and computer name; for example:
`ftp://<FTPUSER>:<FTPPASSWORD>@<COMPUTERNAME>/PAYSLIPS/`
 3. Check the URL setting in Self Service Payslip Options, as follows:
 - a. Select Set Up HCM, Product Related, ePay, Self Service Payslip Options.
 - b. Search for the Global Payroll Country for which you are installing PeopleSoft ePay Payslips. Ensure that the URL setting is the URL Identifier from the prior step.

Important

You may create your own URL ID and update this URL, instead of using GP_SS_PSLP_FTP. If you create your own URL ID you must update the Self Service Payslip Options to point to your new URL ID.

See *PeopleSoft HCM: ePay*, "Setting Up View Payslips."

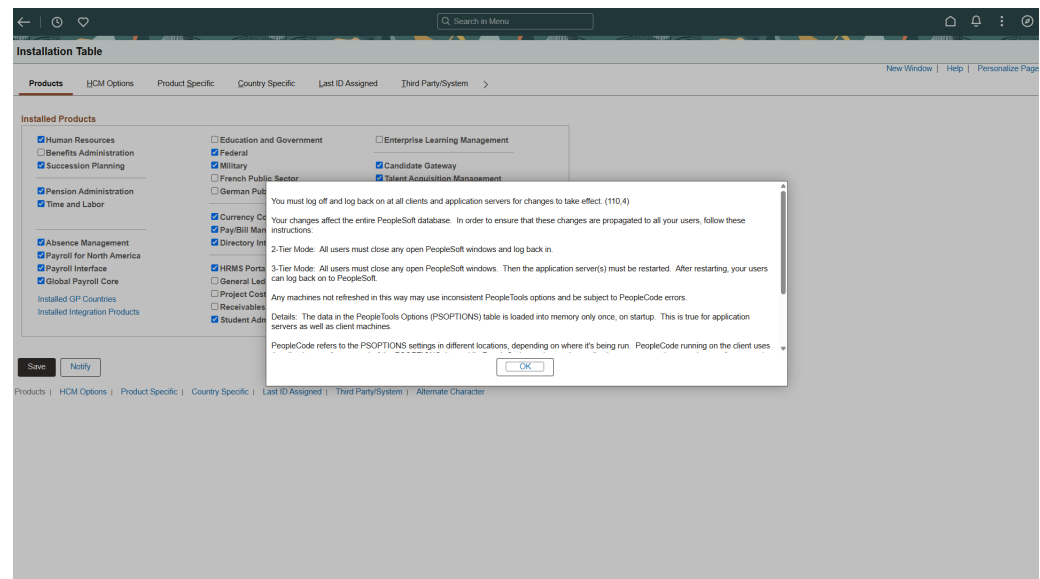
4. Check the PeopleSoft Installation Table Settings, as follows:
 - a. Enter Installation Table in the keyword input field of the Global Search bar. As you type, the suggestions are updated to reflect the search term or terms you have entered.
 - b. Select Installation Table from the search suggestions.

Note

To navigate to the page using the Navbar button, select Set Up HCM, Install, Installation Table.

- c. Select the ePay check box on the main Installation Table tab (Products).
- d. If any changes are necessary to the Installation Table, this informational message appears “You must log off and log back on at all clients and application servers for changes to take effect,” as shown in the following example:

Figure 1-9 Informational Message



5. Log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HCM for your change to take effect.

1.12.3 Installing ePay on z/OS Platforms

This section details additional instructions to install ePay on z/OS platforms:

1. Enter Installation Options in the keyword input field of the Global Search bar. As you type, the suggestions are updated to reflect the search term or terms you have entered.
2. Select Installation Options from the search suggestions.

Note

To navigate to the page using the Navbar button, select Set Up HCM, Product Related, Global Payroll & Absence Mgmt, System Settings, Installation Options.

3. On the Installation Options page, in the Payslip Store Option area, select Attachment/FTP/SFTP from the Store Option drop-down list, as shown in this example:

Figure 1-10 Installation Options page

4. Click Save.

1.12.4 Modifying the Sun JVM Configuration to Increase Heap Size

When you run the payslip report process, the PeopleSoft ePay Application Engine process caches the entire payslip report into memory. If Sun Java is not allocated for sufficient memory, the process abends with this error: `java.lang.OutOfMemoryError`. To increase the memory for Sun Java, edit the `psprcs.cfg` file of each process scheduler server that you intend to use for payslip report generation.

Under the [PSTOOLS] section in `psprcs.cfg`, modify the JVM configuration option to increase the memory allocated. `Xms` is the minimum and `Xmx` is the maximum memory that you would allocate for Java. If a memory error occurred in the payslip process, after you make the JVM changes, reboot the process scheduler. The abended payslip process can then be restarted.

Here is an example of the modified JVM configuration, with the changes in bold text:

```
[PSTOOLS]
;=====
; General settings for PSTOOLS
;=====

;To pass java options to the jvm loaded via JNI, uncomment JavaVM Options=
;and set it equal to the list of parameters you would like to use.
;The options need to be a blank space separated list of valid java options.
;Consult your JRE supplier for valid java options.
;For example, JavaVM Options=-Xmx256m -Xms128m
JavaVM Options=-Xmx512m -Xms32m
```

1.13 Installing PeopleSoft Global Payroll PDF Form Files

This section details how to load the PDF Form Files for use in the PeopleSoft Global Payroll for Switzerland product. Complete this task if you have licensed the PeopleSoft Global Payroll for Switzerland product.

To load the PDF Form Files for use with PeopleSoft Global Payroll for Switzerland:

1. Copy the files *.pdf from the PeopleSoft SQR directory to your local hard drive.
2. Enter Upload Form Definition CHE in the keyword input field of the Global Search bar. As you type, the suggestions are updated to reflect the search term or terms you have entered.
3. Select Upload Form Definition CHE from the search suggestions.

Note

To navigate to the page using the Navbar button, select Set Up HCM, Product Related, Global Payroll and Absence Mgmt, Reports, Upload Form Definition CHE.

4. Use the following table to select the Form IDs for your PeopleSoft Global Payroll for Switzerland:

PeopleSoft Product	Form ID	Effdt	Filename
Global Payroll for Switzerland	LAW-C1	01/01/2004	BETEILIGUNGEN.pdf
Global Payroll for Switzerland	LAW-P1	01/01/2004	_11lohna_3-dfi_25-08-06.pdf
Global Payroll for Switzerland	LAW-P1B	01/01/2004	_11lohna_3-dfi_25-08-06b.pdf
Global Payroll for Switzerland	LAW-P1EDIT	01/01/2004	_11lohna_3-dfi_300913_edit.pdf
Global Payroll for Switzerland	LAW-P2	01/01/2004	_11lohna_3-dfi_25-08-06_x.pdf

5. For each Form ID, click the Delete button, as shown in this example:

Figure 1-11 Upload Form Definition CHE page

The screenshot shows the 'Upload Form Definition CHE' page. At the top, there's a search bar and navigation links. Below the title bar, the 'Form ID' is 'LAW-C1'. The 'Form Data' section includes fields for 'Effective Date' (01/01/2004), 'End Date', 'Description' (Law Statement - Customer Form), and a 'Comment' field. The 'Field Mapping' section contains a table with columns: Language Code, Default Language, Attached File, View, Delete, and Details. The table has one row with 'German' as the language code, a checked 'Default Language' box, and 'Beteiligungen.pdf' as the attached file. Below the table are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

Language Code	Default Language	Attached File	View	Delete	Details
1 German	☒	Beteiligungen.pdf	View	Delete	Details

6. Click Save.

The Add button appears, as shown in this example:

Figure 1-12 Upload Form Definition CHE Page showing Add button

This screenshot is similar to Figure 1-11, but the 'Field Mapping' table now includes an 'Add' button in the row for 'German'. The 'Add' button is located to the left of the 'Details' button. The 'Save' button at the bottom is now highlighted in blue.

Language Code	Default Language	Attached File	Add	Details
1 German	☒		Add	Details

7. Click Add.
8. Navigate to the PDF Form File that you saved on your hard drive, select the file and click the Upload button.
9. Click View to verify that the form is correctly loaded.

1.14 Installing Directory Interface

1.14.1 Prerequisites

PeopleSoft Directory Interface is dependent on an additional component LDAP-enabled directory server. If you have not already done so, install a supported LDAP-enabled directory server using the installation instructions provided by the supplier. Ensure that Oracle supports the directory server that you install.

If you already installed a LDAP-enabled directory server, verify that Oracle supports your directory server supplier and version.

Note

Novell NDS is no longer bundled with PeopleSoft applications. For the most current information on the directory servers that Oracle supports, refer to the certification information and product documentation.

See My Oracle Support, Certifications.

1.14.2 Verifying the Installation Option for Directory Interface

If you are using PeopleSoft Directory Interface, verify that the Directory Interface setting is enabled on the Installation Table. This ensures access to Directory Interface functionality.

Select Set Up HCM, Install, Installation Table and verify that the Directory Interface check box is selected.

1.14.3 Backing up the Directory Server and Database

Before you proceed with the installation, back up all servers and databases that you previously set up for the installation.

To ensure recovery to this point as necessary, do the following:

- Back up any changes that you made to the database server while setting up your PeopleSoft system.
- Back up any changes that you made to your directory server prior to this installation procedure.

1.14.4 Running PeopleSoft Data Mover Scripts

In this section, you run multiple PeopleSoft Data Mover scripts (DMS) against your database.

The Directory Interface includes directory schema extensions and sample maps for publishing Human Resources data to the directory. This step details how to load the sample maps into your PeopleSoft database using PeopleSoft Data Mover.

In addition to the sample maps, you also run PeopleSoft Data Mover scripts that load messages, publish rules, and LDAP extensions into your database.

To run scripts to load sample maps, messages, publish rules and LDAP extensions into your database:

1. Launch PeopleSoft Data Mover on the Install Workstation.
2. Select File, Open.
3. Select the `\scripts` directory on the drive that contains the Directory Interface codeline installation.
For example, `<PS_APP_HOME>\scripts`.
4. Open and select File, Run Script to run the following PeopleSoft Data Mover scripts for PeopleSoft HCM:

`disehr.dms`

`dimaphr.dms`

Note

PeopleSoft Directory Interface includes directory schema extensions relevant to the PeopleSoft Human Resources application. The extensions add two Object Classes (`psftPerson` and `psftJob`) as well as several Attribute Types to your directory. You are not required to use the HR schema extensions. Nevertheless, the sample maps that Oracle provides assume that the HR schema extensions have been applied to the directory.

1.15 Installing PeopleSoft PayBill Management

In this section, you activate the required service operations to integrate with the PeopleSoft FSCM 9.2 database. Oracle only supports the PeopleSoft PayBill Management product on the following database platforms:

- Oracle
- Microsoft SQL Server

Important

For the Oracle database platform only: Run the following statement against the PeopleSoft HCM 9.2 database using SQL*PLUS before running the SQL script:

```
ALTER SESSION set NLS_Date_Format = 'YYYY-MM-DD'
```

To activate the required service operations to integrate with the PeopleSoft FSCM 9.2 database:

1. Using a database query tool (such as iSQL, SQL*Plus, or DB2 Command Window), log on to the target PeopleSoft HCM database.
2. Run the following script from the `<PS_APP_HOME>/scripts` directory:

`activate_all_hcm.sql`

The script reads a project contained in your PeopleSoft HCM 9.2 database named FO_MESSAGES. Based on this, the script activates service operations, routings and handlers, starts queues, and creates or activates Full Data Publish Rules.

1.16 Installing Service Handlers

Some products contain service handlers that you must activate for the database to work properly.

See *PeopleTools: PeopleSoft Integration Broker*.

This step is not performed by the installer but by the implementation team.

To install and activate service handlers:

1. Sign in to the PeopleSoft portal and select PeopleTools, Integration Broker, Integration Setup, Service Definitions.
2. Identify the products listed in the following table that have Service Handlers that need to be activated:

Product	Contain Service Handlers That Must Be Activated
Absence Management	No
Benefits Administration	Optional
Candidate Gateway	Optional
Directory Interface	Yes
eBenefits	No
eCompensation	Yes
eCompensation Manager Desktop	Yes
ePay	No
ePerformance	Optional
eProfile	No
Global Payroll for Argentina (listed as HR Core)	Yes
Global Payroll for Australia	No
Global Payroll for Brazil (listed as HR Core)	Yes
Global Payroll for China	No
Global Payroll for Core	Yes
Global Payroll for France	No
Global Payroll for Hong Kong	No
Global Payroll for India	No
Global Payroll for Japan (listed as Benefits Administration)	Yes
Global Payroll for Malaysia	No
Global Payroll for Mexico (listed as HR Core)	Yes
Global Payroll for New Zealand	No
Global Payroll for Singapore	No

Product	Contain Service Handlers That Must Be Activated
Global Payroll for Spain	No
Global Payroll for Switzerland	Optional
Global Payroll for UK	No
Global Payroll for United States (HR Core)	Yes
HCM for the U.S. Federal Government	No
HCM for Education and Government	Yes
HCM Shared Components	Yes
Human Resources	Yes
Payroll for North America	Yes
Payroll Interface	No
Pension Administration	Optional
Talent Acquisition Manager	Optional
Time and Labor	Optional
Workforce Compensation Solutions	No

3. Carry out these steps for the necessary products:
 - a. Get a list of services for products (as applicable).
 - b. Enter each service name in the Service name field.
 - c. Click Search for each.
4. On the Service details page, click the service operation link in the Existing Operations grid. The Service Operation details page appears.
5. Select the Handlers tab, and verify that the Handlers Status is set to Active.

1.17 Installing PeopleSoft Human Resources for French Public Sector

If you use PeopleSoft Human Resources for French Public Sector, you should verify that the French Public Sector setting is enabled on the Installation Table to ensure access to specific French Public Sector functionality.

To install PeopleSoft Human Resources for French Public Sector:

1. Enter Installation Table in the keyword input field of the Global Search bar. As you type, the suggestions are updated to reflect the search term or terms you have entered.
2. Select Installation Table from the search suggestions.

Note

To navigate to the page using the Navbar button, select Set Up HCM, Install, Installation Table.

3. On the Products page, verify that the Human Resources and French Public Sector check boxes are selected.

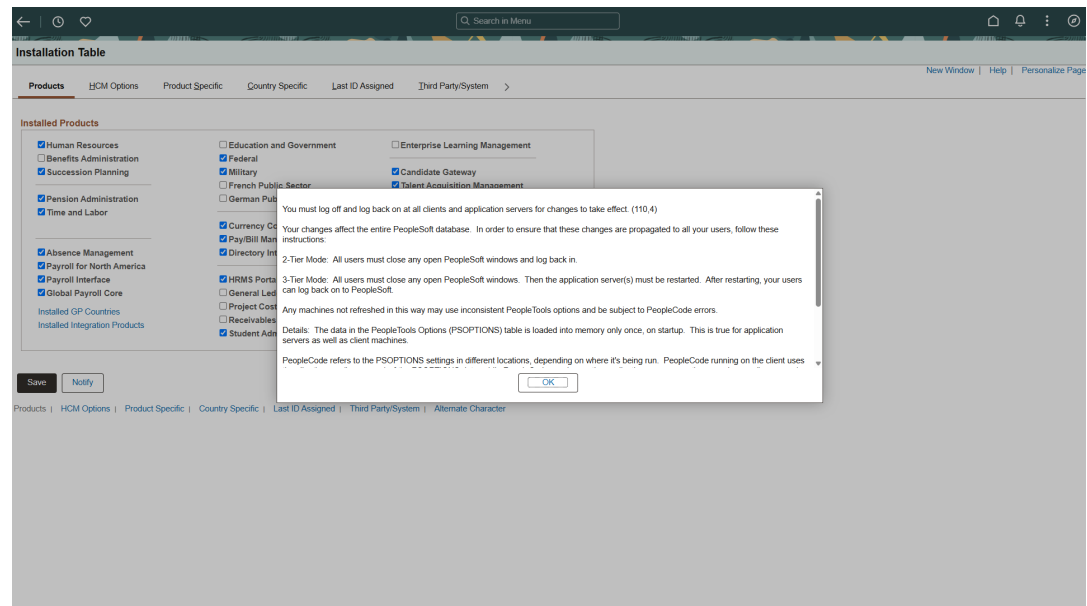
If they are not already selected, select them.

4. Go to the Country Specific page, select the Installed HR Countries link and verify that France is selected.

If it is not selected, select it.

5. If it was necessary to make any changes to the Installation Table, you receive the message “You must log off and log back on at all clients and application servers for changes to take effect,” as shown in the following example:

Figure 1-13 Informational Message



6. Log off all clients, shut down and restart all application servers, and then log back on to PeopleSoft HCM for your changes to take effect.
7. Select Set Up HCM, Install, Product Specific, FPS Installation.
8. Select the FPS Installation Parameters 2 page and then click the Activate FPS Actions button, to use the existing action codes.

1.18 Configuring Search

1.18.1 Understanding Configuring Search

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.

See PeopleSoft Search and Insights Home Page (Article ID KA592) on My Oracle Support for more information. The Move to OpenSearch page includes an OpenSearch FAQ and explains the changes to the user interface.

! 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 regarding the essential hardware to help ensure capacity for peak concurrent usage of your PeopleSoft 9.2 environment. Failing to follow these recommendations can impact the performance and stability of your PeopleSoft 9.2 environment.

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.

As part of PeopleSoft Search, PeopleSoft HCM offers a number of pre-configured global searches and component keyword search pages. You should review the information about PeopleSoft Search Framework implementation for HCM in the product documentation for PeopleSoft HCM: Application Fundamentals for your new release to determine the extent to which PeopleSoft Search can be enabled for your environment.

In addition, search is implemented in specific products and functionality where Verity was provided in releases prior to PeopleSoft 9.2. You should review the PeopleSoft HCM product documentation for your new release to determine the extent to which search is enabled for your environment.

1.18.2 Reviewing PeopleSoft HCM Optional Software Packages for Search

OpenSearch is the only supported Search Engine from PeopleTools 8.61 onwards, and OpenSearch Dashboards is a Data Visualization Tool supported for PeopleSoft Insights. OpenSearch and OpenSearch Dashboards are supported from PeopleTools 8.59.21 and 8.60.07 onwards.

See PeopleSoft Search and Insights Home Page (Article ID KA592) on My Oracle Support for more information. The Move to OpenSearch page includes an OpenSearch FAQ and what changes to expect in the user interface.

The following table lists optional software packages for PeopleSoft HCM 9.2 applications and Search.

In the optional software packages for Search table:

- "R" indicates required.
- "O" indicates optional.
- "N/A" indicates not applicable.

Products	OpenSearch	PeopleSoft Insights
Absence Management	O	O
Base Benefits	O	O
Candidate Gateway	R	N/A
Career Planning	O	N/A
eCompensation Manager Desktop	O	N/A

Products	OpenSearch	PeopleSoft Insights
ePerformance Management	O	N/A
eProfile Manager Desktop	O	N/A
Global Payroll	O	O
Human Resources	R	O
Payroll for North America	O	O
Profile Management	R	N/A
Succession Planning	O	N/A
Talent Acquisition Manager	R	O
Time and Labor	O	O

1.18.3 Defining New Roles for Global Search

This section lists the roles that are provided for Global Search and Search Pages.

To enable search for a user, your PeopleSoft Security administrator should add these roles as follows:

1. Select PeopleTools, Security, User Profiles, User Profiles, and select the appropriate user.
2. On the User Profiles page, select the Roles tab.
3. Add the following roles, which are listed in this table along with the Permission Lists and Search:

Role	Permission List	Search Definition Name
EOFD_ADMIN	EOFD1000	EOFD_FLUID_DISCUSSIONS
EOFD_SUPER_ADMIN	EOFD1000	EOFD_FLUID_DISCUSSIONS
EOFD_ADMIN	EOFD2000	EOFD_FLUID_DISCUSSIONS
EOFD_SUPER_ADMIN	EOFD2000	EOFD_FLUID_DISCUSSIONS
EOFD_USER	EOFD2000	EOFD_FLUID_DISCUSSIONS
GP Search Administrator	HCCPGPSEARCH	GP_PI_SRCH
Search- Absence	HCCPAMSS1S	HC_GP_ABS_SRCH_BAL
Search- Absence	HCCPAMSS1S	HC_GP_ABS_RQST
Search- AppIndex	HCCPRS1321	HC_HRS_APP_INDEX_GS
Search-Benefit	HCCPBN1001	HC_BEN_HEALTH_BENEFIT
Search- Career Plan	HCCPSS3101	HC_HR_CAREER_PLAN
Search- Company Directory	HCCPSS3100	HC_HR_COMPANY_DIRECTORY1
Search- Compensation	HCCPSS2132	HC_COMP_COMPENSATION_HISTORY
Search- Compensation	HCCPSS2132	HC_COMP_TOTALREWARDS
Search-Health and Safety	HCCPHR5160	HC_HS_INCIDENT_DATA
Search-Job	HCCPHR3311	HC_HR_JOB_DATA
Search- JobPostings	HCCPRS1320	HC_HRS_JOB_POSTING
Search-Payroll for NA	HCCPPY1001	HC_HPY_SRCH
Search- Performance	HCCPEP2500	HC_EP_PERF_DEV

Role	Permission List	Search Definition Name
Search-Person	HCCPHR3312	HC_HR_PERSON
Search- Succession Plan	HCCPSS3102	HC_HR_SUCC_PLAN
Search- Time	HCCPSS2131	HC_TL_GBL_TIMESHEET
Search- Time	HCCPSS2131	HC_TL_GBL_PAYABLETIME

1.18.4 Configuring the Portal Node for PeopleSoft HCM

To configure the Portal Node in your PeopleSoft HCM 9.2 environment:

1. Select PeopleTools, Search Framework, Search Admin Activity Guide.
In the Search Administration Activity guide, expand the Configuration Section, and select Setup Local Nodes.
2. On the Nodes search page, search for and select the Portal node *HRMS*.
The Node Definitions page appears.
3. On the Node Definitions page, select the Portal tab to access the Portal page.
4. On the Portal page, in the Content URI Text field, verify that you have entered an address that corresponds to your PeopleSoft HCM environment.
For example: *http://<server>:<port>/psc/pshome/*
5. In the Portal URI Text field, verify that you have entered an address that corresponds to your PeopleSoft HCM environment.
For example: *http://<server>:<port>/psp/pshome/*
6. Click Save.
7. Click Return to Search (optional).

1.18.5 Deploying and Indexing the Searches that Oracle Delivers

Verifying the Roles for Search Users

Oracle delivers PeopleSoft HCM search modules for which predefined Custom, Global, and Keyword searches are provided.

Before you can deploy the search definitions, you must verify that the roles are assigned to the call back user (PSAPPS), as follows:

1. Select PeopleTools, Security, User Profiles, User Profiles, and select the appropriate user.
2. On the User Profiles page, select the Roles tab.
3. Verify that the following roles are assigned to the user:
 - Search Query Administrator
 - Search Administrator

Identifying, Deploying, and Indexing Search Definitions

The following table lists the PeopleSoft HCM searches for which predefined searches are provided:

Search Definition	Usage	Search Definition Name
Fluid Discussions	Custom Search	EOFD_FLUID_DISCUSSIONS
Homepage Notifications ¹	Custom Search	EOHP_NOTIFICATIONS
Change Tracking Analytics	PeopleSoft Insights	EP_EOCC_TRK_ANALYTICS_INSIGHT
GP Insights G/N & ED srch defn	PeopleSoft Insights	GP_KIB_ED_GN_SRCH
Analytics for Earns/Deds and Gross/Net	PeopleSoft Insights	GP_KIB_ERN_DED_GN
GP Insights Operation Analytics	PeopleSoft Insights	GP_KIB_OPER_SRCH
Global Payroll Operation Trend Search	PeopleSoft Insights	GP_KIB_OP_TREND_SRCH
Positive Input Search	Global Search/Custom Search	GP_PI_SRCH
Approval Insights Feed	PeopleSoft Insights	HCSC_APRV_INSIGHTS
Admin Error Rpt Bas Process	PeopleSoft Insights	HC_BEN_ADMINERR_DATA
Employee Needs Approval Data	PeopleSoft Insights	HC_BEN_APPR_DATA
Employee Missing Attachments	PeopleSoft Insights	HC_BEN_ATTACH_DATA
Benefit Analytics for Dependent	PeopleSoft Insights	HC_BEN_BENEFIT_DEP
Benefit Analytics for Employee	PeopleSoft Insights	HC_BEN_BENEFIT_EE
Benefit Analytics EE History	PeopleSoft Insights	HC_BEN_BENEFIT_HST2
DepBen Search	PeopleSoft Insights	HC_BEN_DEPBEN_DATA
Disability Plan Srch	PeopleSoft Insights	HC_BEN_DISAB_PLAN
Employee EOI data for Life Events	PeopleSoft Insights	HC_BEN_EOI_DATA
FSA Plan Srch	PeopleSoft Insights	HC_BEN_FSA_PLAN
Health Benefit	Global Search / Keyword Search	HC_BEN_HEALTH_BENEFIT
Benefits Life Events Data	PeopleSoft Insights	HC_BEN_LE_DATA
Life Plan Srch	PeopleSoft Insights	HC_BEN_LIFE_PLAN
Open Enrollment AG steps	PeopleSoft Insights	HC_BEN_OE_AG
Employee OE Approvals	PeopleSoft Insights	HC_BEN_OE_APPR
Employee OE Missing Attachments	PeopleSoft Insights	HC_BEN_OE_ATTACH
Employee Open Enroll Current Data	PeopleSoft Insights	HC_BEN_OE_CURR
Employee Open Unsubmitted Enrollment	PeopleSoft Insights	HC_BEN_OE_ENROLL
Employee EOI data for Open Enrollment	PeopleSoft Insights	HC_BEN_OE_EOI
Savings Plan Srch	PeopleSoft Insights	HC_BEN_SAV_PLAN
Life Events Unsubmitted Events	PeopleSoft Insights	HC_BNE_LIFEEVT_EXPIRE
Compensation History	Global Search	HC_COMP_COMPENSATION_HISTORY
Compensation Total Rewards	Global Search	HC_COMP_TOTALREWARDS
Development Tips - Competencies	Custom Search	HC_EP_DEVCOMP_TIP
Development Tips - SubCompetencies	Custom Search	HC_EP_DEVSUB_TIP
Development Tips	Custom Search	HC_EP_DEV_TIP
Admin Performance Analytics	PeopleSoft Insights	HC_EP_PERFORMANCE_ADM

Search Definition	Usage	Search Definition Name
Mgr Performance Analytics	PeopleSoft Insights	HC_EP_PERFORMANCE_MGR
Performance Analytics Manager Item	PeopleSoft Insights	HC_EP_PERFORM_ITEM_MGR
Performance Documents	Global Search	HC_EP_PERF_DEV
Team Performance Item Analytics	PeopleSoft Insights	HC_EP_PERF_ITEM_MGR
Performance Analytics Manager Ratings	PeopleSoft Insights	HC_EP_PERF_RATINGS_MGR
Results Writer - Competencies	Custom Search	HC_EP_WRITER_COMP
Results Writer - SubCompetencies	Custom Search	HC_EP_WRITER_SUBCOMP
Absence request search	Global Search / PeopleSoft Insights	HC_GP_ABS_RQST
Absence Balance	Global Search	HC_GP_ABS_SRCH_BAL
Absence Balance Trends	PeopleSoft Insights	HC_HGA_BALANCE_TRENDS
Absence Generated Positive Input	PeopleSoft Insights	HC_HGA_PI_GEN
Processed Absences	PeopleSoft Insights	HC_HGA_PROCESSED_ABS
Year End Audit error details	PeopleSoft Insights	HC_HPY_AUDT_ERR_US
Payroll Categories - CAN	PeopleSoft Insights	HC_HPY_CAT_CAN
Payroll Categories - US	PeopleSoft Insights	HC_HPY_CAT_US
Create Additional Pay	Global Search / Keyword Search	HC_HPY_CREATE_ADDL_PAY
Payroll Categories 2 - CAN	PeopleSoft Insights	HC_HPY_CT2_CAN
Payroll Categories 2 - US	PeopleSoft Insights	HC_HPY_CT2_US
Create General Deduction	Global Search / Keyword Search	HC_HPY_GEN_DED
Payroll Management Checks - US	PeopleSoft Insights	HC_HPY_MGMT_CHK_US
Payroll Management Cheques - CAN	PeopleSoft Insights	HC_HPY_MGMT_CHQ_CAN
Payroll Oper Pay Calendar - CAN	PeopleSoft Insights	HC_HPY_OPER_CAL_CAN
Payroll Oper Pay Calendar - US	PeopleSoft Insights	HC_HPY_OPER_CAL_US
Payroll Oper Exceptions - CAN	PeopleSoft Insights	HC_HPY_OPER_EXC_CAN
Payroll Oper Exceptions - US	PeopleSoft Insights	HC_HPY_OPER_EXC_US
Payroll Oper Retropay - CAN	PeopleSoft Insights	HC_HPY_OPER_RET_CAN
Payroll Oper Retropay - US	PeopleSoft Insights	HC_HPY_OPER_RET_US
Review Garnishment Search	Global Search / Keyword Search	HC_HPY_REVW_GARN
Year End Audit Filters	PeopleSoft Insights	HC_HPY_US_YE_AUDIT_FLTR
Year End Data Load	PeopleSoft Insights	HC_HPY_W2_YEDATA_LD_US
Year End Box details for W-2	PeopleSoft Insights	HC_HPY_YEAR_END_BOX_US
W-2 Year End Forms	PeopleSoft Insights	HC_HPY_YEAR_END_FMS_US
Year End Forms Consent	PeopleSoft Insights	HC_HPY_YEAR_END_W2_CONSENT
Year End W-2 Forms Correction Reasons	PeopleSoft Insights	HC_HPY_YE_FMS_W2C_DTLS_US
Year end W-2 correction forms	PeopleSoft Insights	HC_HPY_YE_W2C_FMS_US
All Applicants	Custom Search	HC_HRS_APPLICANT
Application Profiles	Custom Search	HC_HRS_APPLICATION_CONTENT

Search Definition	Usage	Search Definition Name
Applicant Index	Global Search / Custom Search / PeopleSoft Insights	HC_HRS_APP_INDEX
Data Mapping	Custom Search	HC_HRS_DATA_MAP
Job Posting Profiles	Custom Search	HC_HRS_JOB_CONTENT
All Job Openings	Custom Search/PeopleSoft Insights	HC_HRS_JOB_OPENING
Job Posting	Global Search/Custom Search	HC_HRS_JOB_POSTING
Recruitment Index	PeopleSoft Insights	HC_HRS_RCMNT_ALL
Recruitment Index (Recruiter)	PeopleSoft Insights	HC_HRS_RECRUITER_RCMNT_ALL
Career Plan	Global Search	HC_HR_CAREER_PLAN
Company Directory	Global Search / Custom Search	HC_HR_COMPANY_DIRECTORY1
Job Data ²	Global Search / Keyword Search	HC_HR_JOB_DATA
OnBoarding Administrator Insights	PeopleSoft Insights	HC_HR_ONBOARDING_ADM
OnBoarding Manager Insights	PeopleSoft Insights	HC_HR_ONBOARDING_MGR
Person	Global Search / Keyword Search / PeopleSoft Insights	HC_HR_PERSON
Remote Work History for Managers	PeopleSoft Insights	HC_HR_RWHIS_MGR_IDX
Remote Work History Index Admin	PeopleSoft Insights	HC_HR_RWORKHIS_ADM_IDX
Remote Worker Index	PeopleSoft Insights	HC_HR_RWORK_INDEX
Manager Remote Worker	PeopleSoft Insights	HC_HR_RWORK_MGR_IDX
Remote Worker Vaccination	PeopleSoft Insights	HC_HR_RW_EMP_VACC_INDEX
Succession Planning	Global Search	HC_HR_SUCC_PLAN
Workforce Diversity	PeopleSoft Insights	HC_HR_WF_DIVERSITY
Employee Test Details	PeopleSoft Insights	HC_HS_EMPL_TEST_DATA
Employee Vaccination Details	PeopleSoft Insights	HC_HS_EMPL_VACC_DATA
Incident Details	Global Search / PeopleSoft Insights	HC_HS_INCIDENT_DATA
Incident Data Keyword Search	Keyword Search	HC_HS_INCIDENT_DATA_SRCH
Job Profiles	Custom Search	HC_JPM_NONPERSON_PROFILE
Person Profiles	Custom Search	HC_JPM_PERSON_PROFILE
Position Data Index	PeopleSoft Insights	HC_POSITION_DATA_INDEX
Payable Time Search	Global Search / PeopleSoft Insights	HC_TL_GBL_PAYABLETIME
Payable Time Exceptions	PeopleSoft Insights	HC_TL_GBL_PAYABLETIME_EXCPTN
Time and Labor Time Sheet	Global Search / PeopleSoft Insights	HC_TL_GBL_TIMESHEET
Employee Schedules for timesheet	PeopleSoft Insights	HC_TL_GBL_TIMESHEET_SCHEDULE

¹ The Homepage Notifications search definition is used as the data source in the PeopleSoft HCM landing page in the Suggestions, Continue With, and Announcements sections. Oracle PeopleSoft recommends that you enable real-time indexing for this search definition. For details on Real-Time Indexing, see *PeopleTools: Search Technology*, “Administering Real-Time Indexing.”

² National ID is available as an advanced search field for Job Data search.

For each of the Search definitions that Oracle delivers, you need to complete the following tasks:

1. Deploy: Select PeopleTools, Search Framework, Search Admin Activity Guide.
In the Search Administration activity guide, expand the Administration section, and select Deploy/Delete Object.
2. Index the Search Definitions: Run the process by selecting Select PeopleTools, Search Framework, Search Admin Activity Guide.
In the Search Administration activity guide, expand the Administration section, and select Schedule Search Index.

Note

From PeopleTools 8.62, you can setup a recurrence in Process Scheduler for Automatic Incremental Indexing.

See *PeopleTools: Search Technology*, "Administering PeopleSoft Search Framework," Scheduling Automatic Incremental Indexing.

1.19 Configuring Synonyms for Search

1.19.1 Copy Synonyms to Search Server

To copy the delivered Synonyms to the search server, you need to complete the following tasks:

1. Select PeopleTools, Search Framework, Administration, Synonyms.
2. Select Copy to Search Instance.

1.19.2 Enable Synonyms for Search Definitions

To enable Synonyms for a particular search, you need to complete the following tasks:

1. Select PeopleTools, Search Framework, Administration, Deploy Search Objects.
2. Select Index Settings for each Search Definition for which Synonyms should be enabled.
3. Select Enable Synonyms and select OK.
4. After completing above steps for all Search Definitions for which Synonyms need to be enabled, select all Search Definitions for which these steps were completed, and select the update button.

1.20 Configuring Oracle Delivered Insights Dashboards

1.20.1 Understanding Insights Dashboards

PeopleSoft Insights is PeopleSoft's brand for visualizations and analytics driven by search framework. Currently, PeopleSoft Insights uses Oracle's OpenSearch Dashboards for creating

visualizations and analytics. PeopleTools is integrated with the supported versions of Oracle's OpenSearch and OpenSearch Dashboards.

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.

See the support information on PeopleSoft Search and Insights Home Page (Doc ID 2205540.2).

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

1.20.2 PeopleSoft HCM Delivered Insights Dashboards

PeopleSoft Insights dashboards use search definitions as data source. There can be more than one search definition mapped to a single Insights dashboard. A separate Insights Tile Dashboard is delivered to access the Insights Dashboard.

For the list of PeopleSoft Insights Dashboards delivered by PeopleSoft HCM, see the *PeopleSoft HCM: Application Fundamentals* product documentation.

1.20.3 Defining Roles for PeopleSoft Insights

Each Insights Dashboard is secured by roles. For users to be able to access Insights Tiles and Dashboards, your PeopleSoft Security Administrator should follow these steps:

1. Select PeopleTools, Security, User Profiles, User Profiles.
2. On the User Profiles page, select the Roles tab.
3. Add the PeopleSoft role to grant access to the corresponding Insights Tile and Insights Dashboard.

For the list of PeopleSoft roles that provide access to Insights Tiles and Dashboards, see the *PeopleSoft HCM: Application Fundamentals* product documentation.

1.20.4 Deploying Insights Dashboards

Each dashboard should be deployed before analytics can be accessed from PeopleSoft. To do this, the Administrator should do the following steps:

1. Select PeopleTools, Search Framework, Administration, Deploy Insights Dashboards.
2. Select each Dashboard and select the Deploy button.

Note

For the Dashboards to be working correctly, the corresponding search definitions should be deployed and indexing completed. For more information, refer to the section in this document titled "Deploying and Indexing the Searches that Oracle Delivers."

For more information on deploying Insights Dashboards, see the *PeopleSoft HCM: Application Fundamentals* product documentation.