

# Structured Data Manager

Software Version 7.61

PeopleSoft Modules Installation and Deployment  
Guide



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## About this document

Structured Data Manager's integration kit for PeopleSoft modules provides a powerful, pre-built archive solution for PeopleSoft data. This guide covers:

- meeting the installation prerequisites for PeopleSoft
- installing Structured Data Manager
- deploying PeopleSoft business flows to your runtime system
- running the business flows to archive your PeopleSoft data

## Intended audience

This guide is intended for:

- Administrators/operators who need to run PeopleSoft modules to archive data from PeopleSoft applications
- Administrators/operators who need to install the Structured Data Manager, deploy and redeploy business flows, and run the business flows

## Prerequisites

Prerequisites for installing this product include:

- Knowledge of operating systems
- Database knowledge
- Application knowledge

## Related documentation

- *Structured Data Manager API Reference Guide*  
Provides information about the Groovy script API files for Structured Data Manager.
- *Structured Data Manager Concepts Guide*  
Explains the major concepts of database archiving in general and Structured Data Manager in particular.
- *Structured Data Manager Installation Guide*  
Explains how to use the Installer to install the product.

- *Structured Data Manager Tutorial*  
Provides step-by-step instructions to build a sample archiving module, deploy it, run it, and troubleshoot errors.
- *Structured Data Manager Developers Guide*  
Explains how to use the Designer component to design, build, test, and deploy your archiving projects.
- *Structured Data Manager Runtime Guide*  
Explains how to use the Web Console component to run, monitor, and administer business flows that move data to and from the database.
- *Structured Data Manager Troubleshooting Guide*  
Explains how to diagnose and resolve errors, and provides a list of common errors and solutions.
- *Structured Data Manager Upgrade Guide*  
Explains how to upgrade the product and upgrade the archive schema generated by earlier versions of the product.
- *Structured Data Manager Release Notes*  
Lists any items of importance that were not captured in the regular documentation.
- *Structured Data Manager PeopleSoft Modules Installation and Deployment Guide*  
Explains how to install the PeopleSoft integration kit.
- *Structured Data Manager Oracle E-Business Suite Modules Installation and Deployment Guide*  
Explains how to install the Oracle E-Business Suite integration kit.

# Chapter 1: Prerequisites

Before installing the Structured Data Manager, you should ensure that you have the latest documentation, and that you understand the overall installation process.

- [Before you begin, below](#)
- [Obtain the latest Structured Data Manager documentation, below](#)

## Before you begin

Before you begin archiving data using the Structured Data Manager, you should:

1. Review the *Structured Data Manager Concepts Guide* to become familiar with the software and how you plan to use it.
2. Install the Structured Data Manager according to the instructions in the *Structured Data Manager Installation Guide*.
3. Use the *Structured Data Manager Developer's Guide* to design and develop or customize your archive solution.

## Obtain the latest Structured Data Manager documentation

The latest version of the Structured Data Manager documentation can always be found on the Micro Focus Software Product Manuals web page. You should check for documentation updates before installing.

The latest documentation for Structured Data Manager can be found on [Micro Focus Software Support Online](#)

**NOTE:** This documentation is written to the latest patch version. If you have not installed the latest patch, there may be items in this documentation that do not apply to your environment.

# Chapter 2: Structured Data Manager requirements

Structured Data Manager PeopleSoft integration kits have the following requirements for installation. Requirements vary depending how you plan to archive your data.

- [Operating system and server requirements, below](#)
- [Software requirements, below](#)
- [Oracle database requirements, below](#)
- [Custom target schema, on page 11](#)

## Related information

*Structured Data Manager Concepts Guide*

*Structured Data Manager Installation Guide*

*Structured Data Manager Runtime Guide*

*Structured Data Manager Developer's Guide*

## Operating system and server requirements

The operating system and server requirements are documented in the *Structured Data Manager Installation Guide*.

Ensure that you meet the operating system and server requirements before installing Structured Data Manager.

## Software requirements

### Structured Data Manager requirements

Before installing your PeopleSoft modules, ensure that you are running Structured Data Manager 7.5 with the latest patches.

## Oracle database requirements

Database to database archiving with PeopleSoft requires the following:

- a repository to store archiving metadata
- a source database from which to archive eligible data (also referred to as the active database)
- for distributed archive only, a target database in which to store archived data (also referred to as the archive database)



The repository, source and target databases require one of the following Oracle database versions:

- Oracle 12c( 12.1.0.2 for Linux, 12.1.0.1 for Windows )
- Oracle 11g (11.2.0.3.0 and above)
- Oracle 10g Release 2 (10.2.0.4 and above)
- Oracle 9i Release 2 (9.2.0.8 and above)

An administrator account with the following privileges is required:

- Create Database
- Create Login
- Create User
- Grant permissions to non-owned tables

This document refers to this account as the system account, but it can have any name you assign to it.

**NOTE:** The source database, repository, and target database must use the same character encoding. If the character encoding is not the same, a warning is displayed in the installation summary.

## Source database preparation for Oracle

1. Ensure there is 1.5 GB of available disk space to create tablespaces.

**TIP:** When you calculate the space requirements, you need to consider how much space you need for rollback segments and temporary segments.

2. Create the following data and index tablespaces.

Tablespace	Size	Usage
INTF_DATA	20 GB	Holds table data for the interface schema.
INTF_TEMP	20 GB	Holds temporary data for the interface schema.
ARC_DATA	10 GB	Holds table data for the archive access build schema.
ARC_TEMP	10 GB	Holds temporary data for the archive access build schema.

For example, use syntax similar to the following:

```
create tablespace OBT_DATA datafile '<path>/OBT_DATA.dbf' size 1GB autoextend on;
```

where <path> is the directory location where you want to save the tablespace datafile.

The tablespaces are selected during installation.

See also:

- [Product setup and business flow deployment, on page 16](#)
  - [Deploy business flows, on page 19](#)
3. If you are using the distributed archive configuration option, add an entry in tnsnames.ora for the target database.
  4. Add the following entries to the source database init.ora file:
    - `_PUSH_JOIN_UNION_VIEW = TRUE`
    - `COMPATIBLE = <current_database_release>`

## Target database preparation for Oracle

The target or archive database is required for the distributed archive configuration option.

Ensure the procedures in this section are complete before you run the Web Console or Designer.

1. Create a target database with the following configuration:

- Default LARGE init.ora parameters

The init.ora parameter values depend upon the size of the installation, and are recommended by Micro Focus service representatives.

- 8 K for the db\_block\_size parameter, or the same as the source database
- NLS\_LANGUAGE character set must be the same as the source database

2. Create or expand the following tablespaces:

The tablespaces are selected during installation.

Tablespace	Size	Usage
HIST_DATA	250 GB	Holds table data for the history schema.
HIST_TEMP	50 GB	Holds temporary data for the history schema.
HIST_INDEX	250 GB	Holds temporary data for the history schema.
RELOC_DATA	20 GB	For distributed archive only, holds table data for the relocation schema.
RELOC_TEMP	2 GB	For distributed archive only, holds temporary data for the relocation schema.
AA_DATA	1 GB	Holds table data for the archive access schema.
AA_TEMP	10 GB	Holds temporary data for the archive access schema.

See also:

- [Product setup and business flow deployment, on page 16](#)
- [Deploy business flows, on page 19](#)

3. Add an entry in `tnsnames.ora` for the source database.
4. Ensure the `db_domain` of the target database is the same as the `db_domain` of the source database.

If the `db_domain` is different, set `global_names` to `FALSE`.

## Repository preparation

Structured Data Manager requires a repository to store archiving metadata. The repository should reside on an existing database where backups are regularly performed.

1. Identify a persistent database meeting the following requirements:
  - **Database version**—the database you choose for your repository must have the same database version as the source database.
  - **Available tablespace**—4 GB
  - **Available disk space**—1 GB
2. Create the following tablespaces:

Tablespace	Size	Usage
REP_DATA	800 MB	Holds table data for the repository schema.
REP_TEMP	800 MB	Holds temporary data for the repository schema.

The tablespaces are selected during installation.

3. When you set up database to database archiving, select the tablespaces that you created.

## Custom target schema

Database to database archiving requires a target schema for Oracle. The target schema is created automatically when you deploy a business flow.

**DEPRECATED:** Use the Web Console to create the target schema or database.

The default target schema is created using the naming convention `<source_database_name>_HIST`, where `<source_database_name>` is the name of your source database. Creating your own target schema enables you to select a name that matches your existing naming conventions.

When you create your own target schema, you can also choose to create your own target tables. This enables you to use tables with partitions in your database to database archiving environment.

If you create your own target schema, you must also register the owner mappings.

If you choose to create your own target schema and target tables, perform the steps in the following sections:

- [Create the target schema or database, below](#)
- [Create the target tables, below](#)

## Create the target schema or database

1. Create a schema on the target database for each schema on the source database.
2. Ensure that the schema or database owner has the following permissions:
  - CREATE SESSION
  - CREATE TABLE
  - CREATE DATABASE LINK
  - SELECT ANY DICTIONARY
3. Run the owner mapping API to ensure that the target schema is updated before you deploy any business flows.

See “OwnerMapping JavaScript API” in the *Structured Data Manager API Reference Guide*.

## Create the target tables

After you have created your own target schema, you can use the Web Console to create the target tables.

See the *Structured Data Manager Runtime Guide*.

### To use the Web Console to create the target tables

1. If the Web Console is not running, select **Start > Programs > Structured Data Manager > Start Web Console**.

Or, start the Web Console from the command line using the appropriate command, where <install\_directory> is the location where you installed the software:

For	Type
UNIX GUI	./<install_directory>/obt/bin/webConsole.sh
DOS	<install_directory>/obt/bin/webConsole.bat

The default port for the Web Console is 8080. Since the Web Console runs on Tomcat, you can change this port in the `server.xml` file in `<install_dir>/obt/webconsole/apache-tomcat/conf`. See the *Structured Data Manager Runtime Guide* for more information.

2. Launch the Web browser.

If you choose to create the tables manually, you must ensure each table contains the following columns:

Column name	Data type	Value
OBT_SAVED_ROWID	ROWID	not null
OBT_ROW_SEQ	NUMBER	not null
OBT_WF_RUN_ID	VARCHAR2(128)	not null

- Ensure the new table names match managed table names in the source database or schema.
- Ensure all column names, data types, lengths, and null/not null properties for the managed tables are the same.
- If you choose to create the target driving table, it must also contain the following column:

Column name	Data type	Value
OBT_TIMESTAMP	DATE	SYSDATE

# Chapter 3: Installation

The Structured Data Manager installation installs the Web Console and Designer.

- [Structured Data Manager installation overview](#) , below
- [Install Structured Data Manager, on the next page](#)

See also

*Structured Data Manager Installation Guide*

*Structured Data Manager Runtime Guide*

## Structured Data Manager installation overview

Before you can use the Micro Focus Databases Archiving software to archive your data, you need to install the software, set up the database archiving components, and deploy the business flows that archive your data.

Installing the Structured Data Manager consists of the following main steps:

1. Review the introductory chapters in the *Structured Data Manager Developer's Guide* and the *Structured Data Manager Runtime Guide* to choose the archive solution that is right for you.
2. Ensure that all the requirements for your servers, databases, and archiving solution have been met.

See also:

- [Operating system and server requirements, on page 8](#)
- [Software requirements, on page 8](#)
- [Oracle database requirements, on page 8](#)
- [Repository preparation, on page 11](#)

3. Install Structured Data Manager. Structured Data Manager installation installs the Web Console and Designer.

See [Install Structured Data Manager, on the next page](#).

4. Start the Web Console to create the repository and set up database to database archiving.

See also [Product setup and business flow deployment, on page 16](#).

5. Run the addObjectOwnerPair.groovy API to create the correct names for your archive access schema.

See also [Set the archive access schema name, on page 16](#).

6. Obtain the necessary project files for your PeopleSoft modules.  
See also [Import PeopleSoft integration kits, on page 18](#).
7. Customize your PeopleSoft project.
8. Deploy the business flows you have created. You can deploy the business flows and cartridges using Designer, or generate them to be deployed using the Web Console.  
See also [Deploy business flows, on page 19](#).

## Install Structured Data Manager

Before deploying the business flows for your PeopleSoft modules, you must install Structured Data Manager and set up the Web Console:

- Install as per the instructions in *Structured Data Manager Installation Guide*
- Set up the Web Console as per the instructions in *Structured Data Manager Runtime Guide*.

## Post installation task

**After you set up the Web Console, do the following**

1. Start the Web Console.
2. Click **Business Flow Management**.
3. Click **Parameters** from the menu at the top of the page.
4. Choose **Database to Database**.
5. Under the **Core Parameters**, set the **Use Data Movement Key to move data** to true.
6. Click **Apply**.

# Chapter 4: Product setup and business flow deployment

Use the Web Console to configure database to database archiving and to deploy business flows against a database for execution.

To use the command line, see the *Structured Data Manager Installation Guide*.

- [Set the archive access schema name, below](#)
- [Run reports from the archive access account, on the next page](#)
- [Import PeopleSoft integration kits, on page 18](#)
- [Deploy business flows, on page 19](#)
- [Create a new access profile in PeopleTools 8.4x and above, on page 22](#)

See also

- *Structured Data Manager Installation Guide*
- *Structured Data Manager Runtime Guide*

**NOTE:** If you are running on AIX, you need to perform some additional steps because the Web Console requires the Java 6 32-bit JRE. For detailed information, refer to the *Structured Data Manager Runtime Guide*.

## Set the archive access schema name

Before deploying any PeopleSoft cartridges or business flows, you need to run the `addObjectOwnerPair.groovy` API to create the archive access schema name.

By default, the archive access schema is created using the naming convention `<source_database_name>_AA`, where `<source_database_name>` is the name of your source database. For example, if the default PeopleSoft schema is `SYSADM`, then the archive access schema is automatically created as `SYSADM_AA`.

Because the PeopleSoft Access ID is limited to 8 characters, and the Access ID is used for archive access, you need to create a name to be used for the archive access schema before deploying a cartridge or business flow. When cartridges and business flows are deployed, the name you set here is used instead of the default naming convention. For example, for the `SYSADM` schema, you could create the name as `SYSADMAA`, which meets the character limitation.

The owner mapping must not be already defined in the OLTP database, and the archive access owner name must not be in use.

1. Navigate to the following directory:

```
<install_directory>/obt/bin
```

where `<install_directory>` is the location where you installed the software.



2. Run the addObjectOwnerPair.groovy API using the appropriate syntax:

For	Syntax
UNIX	<code>./launch_groovyscript.sh -e DefaultEnvironment -f                  ../scripts/addObjectOwnerPair.groovy &lt;oltpCatalog&gt;                  &lt;oltpSchema&gt; &lt;aaCatalog&gt; &lt;aaSchema&gt; [&lt;transparencyLayer&gt;]</code>
WINDOWS	<code>launch_groovyscript.bat -e DefaultEnvironment -f                  ../scripts/addObjectOwnerPair.groovy &lt;oltpCatalog&gt;                  &lt;oltpSchema&gt; &lt;aaCatalog&gt; &lt;aaSchema&gt; [&lt;transparencyLayer&gt;]</code>

Where	Is
oltpCatalog	Source catalog for SQL Server. For Oracle, this is always "" (empty string).
oltpSchema	Source schema for Oracle. Source user for SQL Server.
aaCatalog	Archive access catalog for SQL Server. For Oracle, this is always "" (empty string).
aaSchema	The name you want to use for your archive access schema. The archive access schema name is limited to 8 characters because of the PeopleSoft Access ID requirement.  Archive access schema for Oracle.  Archive access user for SQL Server.
transparencyLayer	Name of the transparency layer (optional).

**Example**

```
launch_groovyscript.bat -e DefaultEnvironment -f
..\scripts\addObjectOwnerPair.groovy "" pshrdmo "" SYSADMAA
```

3. Enter the encryption key at the prompt.

See *Structured Data Manager API Reference Guide*

## Run reports from the archive access account

The PeopleSoft archive access layer is created as a read-only view of the database to prevent any inadvertent change to archived data. The PeopleSoft Process Scheduler, however, needs write access to certain PeopleTools tables while running reports. Therefore, running reports through the archive access layer requires write access to these tables.

As an example, in PeopleTools 8.50, privileges need to be explicitly given to the following tables:

```
grant update,insert on ps_prCSRuncntl to SYSADMAA;  
grant update,insert on psprCSRqst to SYSADMAA;  
grant update on ps_prCSsystem to SYSADMAA;  
grant insert,update on psserverstat to SYSADMAA;  
grant update on pslock to SYSADMAA;  
grant update,insert,delete on psprCSRuncntl to SYSADMAA;  
grant update,insert,delete on psprCSRuncdel to SYSADMAA;  
grant update,insert on psprCSlock to SYSADMAA;  
grant update,insert on psprCSRqstxfer to SYSADMAA;  
grant update,insert on ps_message_log to SYSADMAA;  
grant update,insert on ps_message_logparm to SYSADMAA;  
grant update,insert on <RunCntlTables> to SYSADMAA;  
where <RunCntlTables> are the run control tables for the reports you plan to run  
from the archive access account.
```

## Import PeopleSoft integration kits

The PeopleSoft integration kits are delivered on a CD or as .zip files you can download. You should import the kits into Designer for review or modification.

1. If the Web Console is not running, select **Start > Programs > Structured Data Manager > Start Web Console**.

Or, start the Web Console from the command line using the appropriate command, where <install\_directory> is the location where you installed the software:

For	Type
UNIX GUI	./<install_directory>/obt/bin/webConsole.sh
WINDOWS	<install_directory>/obt/bin/webConsole.bat

2. Launch the Web browser.  
The Web Console opens.
3. Open the .zip file containing the PeopleSoft kits.

The zip file contains individual .zip files for each PeopleSoft module. For example, xxx.sdm\_7.60\_<Bld\_no>.zip (where Bld\_no is the build number and rev\_no is the revision number) contains the files for the PeopleSoft Payroll module.

4. Extract the individual .zip files for the desired PeopleSoft modules from the main zip file.
5. Extract the files from the individual module .zip files into a directory that is accessible from the machine where you plan to run Structured Data Manager.

Each PeopleSoft module zip file contains the following subdirectories:

Directory	Contents
sources	contains the project file (.hdp) that you can open with Designer.
deployables	contains the deployment files (.busflow) that you can directly deploy from the Web Console.
utils	contains additional files that typically do not need to be accessed.

6. Launch Designer.
7. Create a new project.

The project requires a connection to the Oracle database that contains the PeopleSoft tables you want to archive.

8. Import the PeopleSoft project.
  - a. Select **File > Import**.
  - b. Choose **Existing Designer Project** from the list of values.
  - c. Click **Next**.
  - d. Browse to the location of the PeopleSoft project.

The PeopleSoft project is stored as a .hdp file.

At this point you can review or modify the projects in Designer. After review or modification, you can deploy the PeopleSoft business flows from Designer or the Web Console.

Related information

- *Structured Data Manager Runtime Guide*
- *Structured Data Manager Developer's Guide*

## Deploy business flows

You can deploy business flows from Designer or the Web Console.

In Designer, you can deploy business flows that you created or modified from your PeopleSoft project, or you can generate business flows to be deployed later using the Web Console.

Generated business flows are .zip files with a .busflow extension. Generated business flows that have not been modified are located in the deployables directory extracted in [Import PeopleSoft integration kits, on the previous page](#).

You can deploy multiple business flows at the same time.

See also

- *Structured Data Manager Runtime Guide*
- *Structured Data Manager Developer's Guide*

**TIP:** You can use advanced mode or express mode to deploy business flows. Advanced allows you to set your Oracle tablespace sizes. With express mode, the tablespace sizes are set automatically.

## Create database to database archive access transparency

Data transparency refers to the ability of users to see archived data as though it were still in the active database. If you implement data transparency, both active and archive data can be accessed through the current user interface. All data relationships necessary to maintain data and application integrity are retained.

After archiving your data, you can run the Create Archive Access job to enable transparency, which allows your users to view your archived data directly from the application.

**NOTE:** Contact your Micro Focus sales representative for information about licensing requirements for data transparency.

The Create Archive Access job creates or recreates objects within the Archive Access schemas or databases. The running time of the script depends on the number of cartridges included in your business flows, the number of managed tables, and the number of views, stored procedures, and packages that are dependent on those objects. To customize this job, see the *Structured Data Manager API Reference Guide*.

You should run the Create Archive Access job whenever any of the following occur:

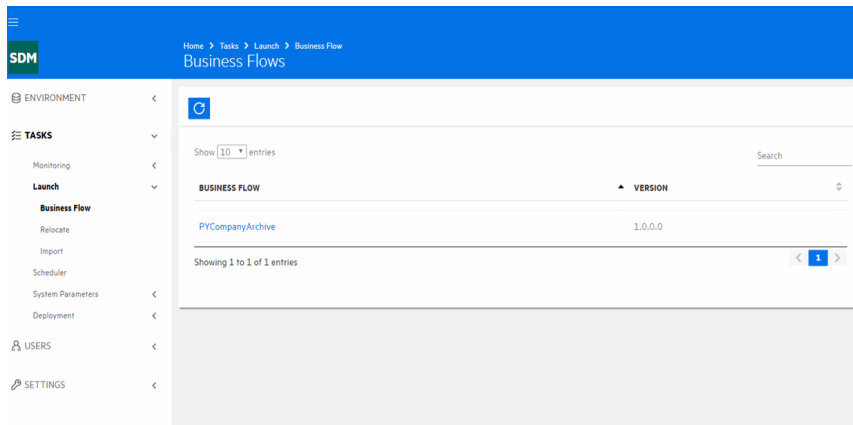
- Changes are made to tables, views, stored procedures, or packages in the active database.
- New cartridges are installed.
- Cartridges are upgraded.
- New patches are installed on the active database.
- Any of the ArchiveAccessConfiguration groovy scripts are run.

*Structured Data Manager API Reference Guide*

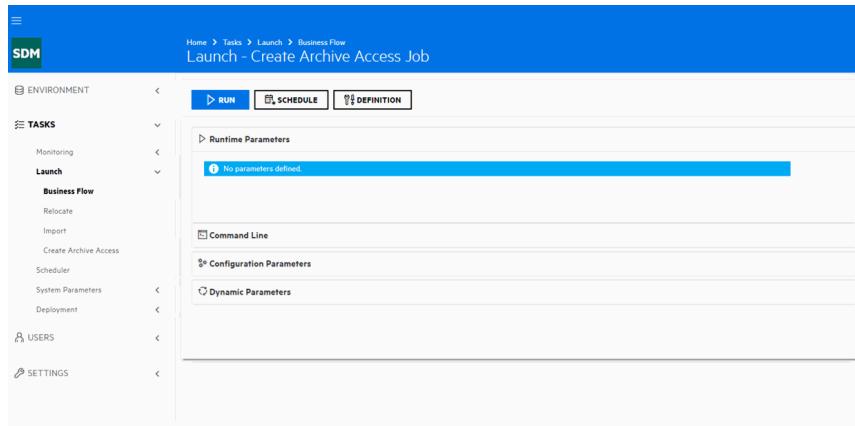
**NOTE:** The Archive Access schema is unstable while the Create Archive Access job is running. To avoid errors, wait until after the job has completed successfully before accessing the archive.

1. Start the Web Console, if it is not already started.
2. Ensure that you have deployed the business flows.
3. Confirm that the configuration mode parameter is properly set by navigating to the Parameters - Database to Database page.

4. Click **Launch** in the menu at the top of the page.



5. Click **Create Archive Access** in the left navigation pane. The job launch page for the Create Archive Access job displays.



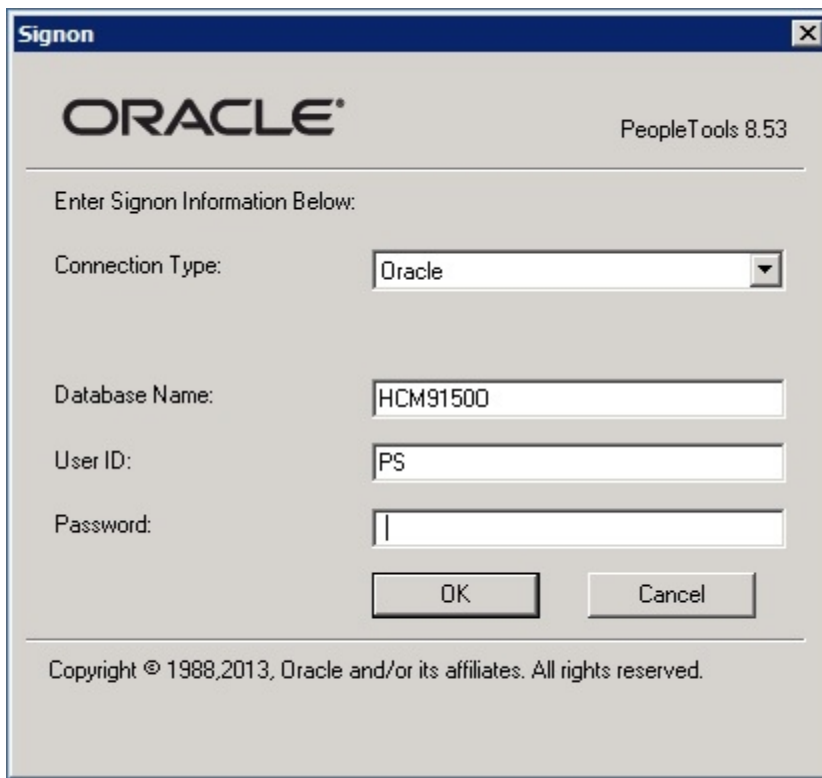
6. Click **Run** to run the job immediately, or **Schedule** to schedule the job for a later time.
7. Click **Confirm** to confirm the job. When the job completes successfully, you should be able to access the access the archived data from your application.

Test accessing some of the archived data from your application to ensure that the archive access is working.

## Create a new access profile in PeopleTools 8.4x and above

To create a new access profile, edit, or delete existing profiles in PeopleTools, use the **Access Profiles** screen.

1. Sign on to the Application Designer.



The screenshot shows a 'Signon' dialog box with the following fields and values:

- Connection Type: Oracle
- Database Name: HCM91500
- User ID: PS
- Password: (empty)

Buttons: OK, Cancel

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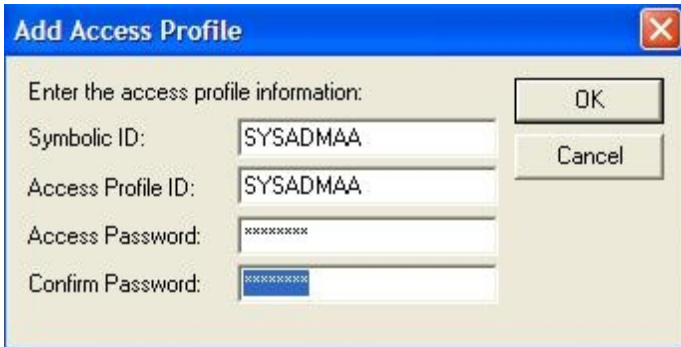
2. Click **OK**.
3. In the next screen, select **Tools > Miscellaneous Objects > Access Profiles**.

The Access Profiles screen displays.



4. Click **New**.

The Add Access Profile screen displays.



5. Enter the following information:

Field	Description
Symbolic ID	Enter the Symbolic ID you want to assign to the new access profile. For example, SYSADMAA.
Access Profile ID	Enter the name of the Archive Access schema that was created at installation. This value must be SYSADMAA.
Access Password	Enter a password for the access profile.
Confirm Password	Enter the password again.

6. Click **OK** to save the new user profile.
7. Click **Close** to exit the Access Profiles screen.

## Grant archive access to user accounts in PeopleTools 8.4x

After creating the access profile, you must duplicate an existing user account and grant access to that new user.

**NOTE:** Repeat these steps for each user who requires access.

1. Go to **Home > PeopleTools > Security > User Profile > Copy User Profiles**.
2. Select the user account you want to duplicate the list of values, for example, the PS user.

The Copy User profiles page for PS displays.

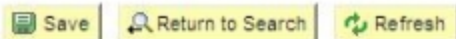
### Copy User Profiles

Existing User ID: PS

#### New User Information

*New User ID:	<input type="text" value="PS_AA"/>
Description:	<input type="text" value="PS Archive Access User"/>
*New Password:	<input type="password" value="*****"/>
*Confirm Password:	<input type="password" value="*****"/>

Copy ID Type Information  
(Includes values assigned for types such as Employee, Customer, Person, etc.)



3. Enter the following information:

Field	Description
New User ID	Enter the name you want to assign to the new user account. For example, PS_AA.
Description	Archive access account for PS.
New Password	Enter a password for the user account.
Confirm Password	Enter the password again.

4. Click **Save**.
5. The user Profile pages for PS\_AA displays.



The screenshot displays the 'User ID' configuration page in PeopleSoft. The 'ID' tab is selected. The user ID is 'PS\_AA' and the description is 'PS Archive Access User'. Under 'Logon Information', the Symbolic ID is 'SYSADM', the password is 'SYSADM1', and the confirm password is 'SYSADMAA'. The 'General Attributes' section shows the language code as 'English' and the currency code as 'US Dollar'. The 'Permission Lists' section includes Navigator (HCSPNAVHP), Homepage (HCSPPRFL), Process Profile (HCSPPRFL), Primary (HCPPALL), and Row Security (HCDFALL). At the bottom, there are buttons for 'Save', 'Return to Search', 'Add', and 'Update/Display'.

6. Select the new Symbolic ID from the list of values.
7. Click **Save**.

## Enable archive access

Before you can view the archived data in PeopleSoft, you need to enable archive access.

1. Follow your company's procedures to create a new application server for archive access.

The user ID used when starting the application server must have its Symbolic ID pointing to the archive access schema. For example, PS\_AA should point to SYSADMAA.

2. Ensure that each user requiring archive access has an archive user profile.

## Next steps

Continue with [Next steps, on page 26](#).

# Chapter 5: Next steps

Running PeopleSoft business flows requires that you perform the following tasks:

1. Deploy business flows.

Before you can configure or run business flows, you need to deploy them into the environment. You can deploy business flows from Designer or from the Web Console.

2. Run business flows.

You use business flows to execute your archive logic. All deployed business flows configured to run in an environment are displayed in the Web Console.

3. Optionally, if you should ever need to remove a business flow, you are able to do so. You can use the Web Console to uninstall business flows. By default, the job run history is left intact.

See *Structured Data Manager Runtime Guide*

# Appendix A: Configure Tuxedo and WebLogic for archive access

The following example is for configuring Oracle Tuxedo and WebLogic on UNIX to enable archive access using PeopleSoft Internet Architecture (PIA).

- [Create a new Tuxedo application server domain, below](#)
- [Create a new PeopleSoft web site on a WebLogic server, on page 30](#)
- [Start the WebLogic web server domain, on page 31](#)

## Create a new Tuxedo application server domain

1. Start the PeopleSoft Server Administration menu on the application server.

### Example

```
cd $PS_HOME/appserv
./psadmin
```

2. Enter 1 to enter the PeopleSoft Application Server Administration menu.
3. Enter 2 to create a domain.
4. Enter the domain name you want to use at the prompt.

### Example

```
Please enter name of domain to create :AAPSFS
```

**NOTE:** Domain names are case-sensitive and must be eight US-ASCII characters or less. The domain name is used to create a directory name under the \$PS\_HOME/appserv directory.

5. Enter 1 to use the small configuration template.

The domain is created and the following prompt displays:

```
Would you like to configure this domain now? (y/n) [y] :
```

6. Enter y to start the PeopleSoft Application Server Administration Quick-configure menu.

### Example

```
-----  
Quick-configure menu -- domain: AAPSFS  
-----  
          Features                      Settings  
          =====                      =====  
1) Pub/Sub Servers   : No           15) DBNAME  :[PSHRDMO]  
2) Quick Server     : No           16) DBTYPE  :[ORACLE]  
3) Query Servers    : No           17) UserId  :[PS]  
4) Jolt              : Yes          18) UserPswd :[PS]  
5) Jolt Relay       : No           19) DomainID :[AAPSFS]  
6) WSL              : Yes          20) AddToPATH :[/appl/oracle/10.2.0/bin]  
7) PC Debugger      : No           21) ConnectID :[people]  
8) Event Notification : No          22) ConnectPswd:[people]  
9) MCF Servers      : No           23) ServerName :[]  
10) Perf Collator   : No           24) WSL Port  :[7030]  
11) Analytic Servers : No           25) JSL Port  :[9030]  
12) Domains Gateway : No           26) JRAD Port  :[9130]  
  
Actions  
=====  
13) Load config as shown  
14) Custom configuration  
    h) Help for this menu  
    q) Return to previous menu
```

Enter selection (1-26, h, or q):

7. Enter 6 to configure the WSL to boot.
8. Enter 13 to load the configuration.

**NOTE:** If you plan to install a real-time event notification (REN) server, consult your PeopleSoft documentation for further instructions.

9. Enter q to return to the PeopleSoft Application Server Administration menu.
10. Enter 1 to administer the domain server.  
The Tuxedo domain list displays.
11. Enter the number for the domain you want to reboot.
12. Enter 1 to boot the domain.
13. Enter 1 to perform a serial boot.
14. Enter q to exit the menus without stopping the application server domain.

## Create new Tuxedo Process Scheduler

1. Start the PeopleSoft Server Administration menu on the application server.

### Example

```
cd $PS_HOME/appserv  
./psadmin
```

2. Enter 2 to enter the PeopleSoft Process Scheduler Administration menu.
3. Enter 4 to create a Process Scheduler Server Configuration.
4. Enter the database name you want to use at the prompt.

### Example

Please enter name of the database that the server will access: PRDSCM91

The following prompt displays:

Would you like to configure this Process Scheduler now? (y/n) [y] :

5. Enter y to start the PeopleSoft Process Scheduler Administration Quick-configure menu.

### Example

```
-----  
Quick-configure menu--Scheduler for database: H1SCM910  
-----  
          Features                Settings  
          =====                =====  
1) Master Schdlr   : Yes        5) DBNAME :[PSHRDMO]  
2) App Eng Server  : Yes        6) DBTYPE :[ORACLE]  
                                     7) PrcsServer :[PSNT]  
                                     8) UserId :[PS_AA]  
                                     9) UserPswd :[PS_AA]  
                                    10) ConnectID :[people]  
                                    11) ConnectPswd:[people]  
                                    12) ServerName :[]  
13) Log/Output Dir :[%PS_SERVDIR%\log_output]  
14) SQRBIN :[D:\PS851\bin\sqr\ORA\binw]  
15) AddToPATH :[%WINDIR%;%WINDIR%\SYSTEM32]  
16) DBBIN :[D:\oracle\product\10.2.0\client_1\BIN]  
  
Actions  
=====  
3) Load config as shown  
4) Custom configuration  
h) Help for this menu  
q) Return to previous menu  
  
Enter selection (1-16, h, or q):  
HINT: Enter 5 to edit DBNAME, then 3 to load
```

6. Enter 3 to Load the config as shown.
7. Enter 1 to start a Process Scheduler server. This boots the process Scheduler server.

## Create a new PeopleSoft web site on a WebLogic server

After you have created and configured the new application server domain, you need to create a PeopleSoft web site on the WebLogic server that can connect to the new domain.

1. Navigate to the following directory:  
\$PS\_HOME/setup/mpinternet
2. Run the setup program for your operating system.  
The PeopleSoft Internet Architecture installation wizard displays.
3. Click **Next**.
4. Specify the root directory where PeopleSoft is installed. This is usually called the PS\_HOME

directory.

5. Choose the BEA WebLogic Server.
6. Specify the root directory where WebLogic is installed.

**NOTE:** Ensure that you select the correct directory for WebLogic. If you enter the incorrect path, the following error message displays: Detected web server version: no choices available.

7. Enter the administrator login ID and password for the new domain to be created.
8. Select the Create New WebLogic Domain radio button.
9. Enter the domain name you created in [Create a new Tuxedo application server domain, on page 27](#) and click Next.
10. Select the type of domain you want to create.
11. Enter a name for the PeopleSoft web site, for example, AAPSFS.
12. Enter the following information:

Field	Description
AppServer Name	The ServerName from the application server configuration file found in <a href="#">Create a new Tuxedo application server domain, on page 27</a> .
JSL Port	The JSL Port from the application server configuration file found in <a href="#">Create a new Tuxedo application server domain, on page 27</a> .
HTTP Port	The HTTP port used by the application server.
HTTPS Port	The HTTPS port used by the application server.
Authentication Token Domain: (optional)	Optional. The Authentication Token Domain you want to use for the application server.

13. Enter the web profile name used to configure the PeopleSoft web site, and the User ID and password used by the PIA servlets to log in to the application server to retrieve the profile.
14. Specify the root directory for the Report Repository, for example, psreports.
15. Verify your selections and click Install to begin the installation.
16. Click Finish to complete the installation.

The default installation directory is \$PS\_HOME/webserv/<domain\_name>.

where <domain\_name> is the name of the domain you created.

## Start the WebLogic web server domain

You can now start the web server from the new directory you created.

1. Navigate to the new web server directory:

**Example**

```
cd $PS_HOME/webserv/<domain_name>/bin
```

Where <domain\_name> is the name of the domain you created.

2. Start the web server.

**Example**

```
./startPIA.sh
```

You can now connect to the application from a client browser.

**Example**

http://<machine\_name>:<http\_port>/<site\_name>/signon.html

Where	Is
machine_name	The machine name or the IP address where the application is running.
http_port	The port number for the application.
site_name	The name of the web site you created in <a href="#">Create a new PeopleSoft web site on a WebLogic server, on page 30</a> .



# Appendix B: Tune the archive access layer

To improve the performance of the archive access layer for data transparency (database to database), Structured Data Manager provides a number of parameters. By adding a logon trigger to the archive access schema, you can set these parameters to tune performance in your environment.

**NOTE:** You need to add the logon trigger to any archive access schema used to access the combined data. If you only have one archive access schema, you would add it just to that schema. If you used multiple archive access schemas to combine the data, then you would need to add it to each of those schemas.

## Example

You could add a logon trigger similar to this one to all of the archive access schemas from which you are combining data:

```
CREATE or replace TRIGGER obtps_cust_logon AFTER logon ON sysadmaa.schema begin
  declare
    procedure execute_sql (p_sql_stmt in varchar2) is
      l_count number;
      l_c number;
      l_rc number;
  begin
    l_c := dbms_sql.open_cursor;
    dbms_sql.parse(l_c, p_sql_stmt, dbms_sql.native);
    l_rc := dbms_sql.execute(l_c);
    dbms_sql.close_cursor(l_c);
  end execute_sql;

  BEGIN
  execute_sql('ALTER SESSION SET "_PUSH_JOIN_PREDICATE"=TRUE');
  execute_sql('ALTER SESSION SET "_COMPLEX_VIEW_MERGING"=true');
  execute_sql('ALTER SESSION SET "_UNNEST_SUBQUERY"=FALSE');
  execute_sql('ALTER SESSION SET optimizer_index_cost_adj=100');
  execute_sql('ALTER SESSION SET optimizer_index_caching=0');
  execute_sql('ALTER SESSION SET "_index_join_enabled"=false');
  execute_sql('ALTER SESSION SET "_optimizer_push_pred_cost_based"=false');
  execute_sql('ALTER SESSION SET "_optimizer_cost_based_transformation"=on');
  execute_sql('ALTER SESSION SET "_push_join_union_view"=true');
  END;
end;
/
```

# Glossary

## **active database**

The database from which you plan to move or copy data. Typically, this database is your online transaction processing (OLTP) or production database. In a two- or three-tiered configuration, the active database resides on tier one and is the source for data movement operations.

## **active environment**

The Web Console views and acts upon only one environment at a time, the active environment. To switch the active environment, you use the Change Active option in the Web Console.

## **activity**

In Designer, a component of a business flow, which is added by using the toolbar. For example, you can add archive and reload activities to your business flow. Note, activities in a business flow are different from what you see at runtime and therefore do not necessarily map directly to what you see in the Web Console.

## **advanced selection**

A method of data selection that discovers all of the interrelated rows from multiple tables and conceptually places them in the same application partition for archiving.

## **annotation**

In Designer, a comment associated with the project, or one of its objects or components. These comments are collected and published in a PDF file when you right click a project or business flow and select Generate Documentation.

## **application partitioning**

The concept of partitioning related rows together during data selection, regardless of whether they are in one or more tables. Application partitioning is unique to Structured Data Manager and contrasts with the more common table partitioning offered by the

database management software, which only groups related rows from one table.

## **archive data store**

The location where the data is to be archived. Can be a separate database, separate space on the same database, or an XML file. In a two-tiered configuration, the archive data store resides on tier two and can be a database or XML. In a three-tiered configuration, the archive data store is a database on tier two and XML on tier three, and is the target for data movement operations.

## **archive query server**

The component that provides SQL access to XML database archives.

## **Consolidated Archive**

A managed, scalable repository that consolidates electronic communications, attachments, and files, and provides complete control over corporate information assets, facilitating compliance with internal corporate governance policies and procedures as well as externally mandated laws and regulations.

## **business flow**

A series of activities, such as archive operations and scripts, that run in sequence. You build business flows in Designer.

## **business flow status**

The Web Console shows the last run of each business flow. The states are Complete/Error/Running.

## **cartridge**

An instance of model- or schema-based eligibility criteria used to move or copy data from one location to another. Cartridges capture the application and business rules to ensure referential integrity of the data. For any one model in your project, you may have many cartridges that use it.

## **chaining table**

The lower level table in a many-to-one or a many-to-many relationship between higher level and lower level tables in the model hierarchy.

**classification**

The Content Manager (formerly Records Manager) classification to be applied to the data moved by Structured Data Manager. This classification specifies where to place the data when it is ingested by Content Manager. For more information, see the Content Manager documentation.

**collection**

The configuration of a directory location and file pattern to match a set of archived XML files, thus allowing SQL access to the archived data.

**comma separated values (CSV)**

A database-to-file output format that stores the data as values separated by commas and a metadata file. Each line in the CSV file corresponds to a row in a table. Within a line, fields are separated by commas, each field belonging to one table column. CSV files provide a simple format that many applications can import.

**command**

Command files or JavaScript files launched by the Web Console on your behalf with status displays.

**condition**

In Designer, the way you branch your business flow to run or skip an activity based on some criteria.

**configuration parameter**

A type of parameter that has its values set by an administrator (someone who has repository privileges from the Web Console) through the administrator interface. Typically, this type of parameter represents values that should be changed very infrequently, perhaps only at deployment time.

**console user**

The Web Console identifies individual users, who are distinct from database users. The properties for a user are User Name, Full Name, Password, Enabled, Description, Email, Phone, and Privileges.

**console user name**

The login name associated with a Web Console user.

**constraint**

A column or a list of columns that enables you to identify rows in the database and relate them to one another.

**Content Manager**

Enterprise document and records management software designed to simplify the capture, management, security, and access to information. Records Manager enables organizations to more easily comply with regulations and corporate policies, and it helps secure information from inappropriate access and misuse.

**custom properties**

User-created name/value pairs in cartridges and business flows. These values are exposed at runtime as parameters.

**customization**

A change that an administrator or DBA makes to a project provided by a third party, typically for a packaged application like Oracle PeopleSoft or Oracle E-Business Suite. As long as the customization is allowable by the project, the user can merge the customization into newer revisions of the third party project.

**customization mode**

A Designer mode that provides visual cues to indicate customizations in the model. In a project with locked files, customization mode is on by default, but you can toggle it on and off from the toolbar in the model editor.

**data access cartridge**

A cartridge that provides lightweight query access to retired or archived data. Data access cartridges are designed by the archive developer but can be run by business users with no technical expertise.

**data masking**

The process of replacing private or confidential data during movement with a specified mask. You can choose from pre-defined masks that are part of Micro Focus or create your own

mask. A mask may or may not be reversible upon reload from the archive data store.

**data movement**

The method used by Structured Data Manager to actually move data (transactional, bulk or partitioned for database to database, and copy or archive for database to file).

**data transparency**

The ability to access archived data through your standard application interfaces for data access. Data transparency enables users to access archived data as though it were still in the active database.

**database constraint**

A constraint that exists in the database and can be discovered and referenced from Designer.

**database to database**

A movement in which data goes from an active database to an archive database, or separate tablespaces inside the active database. Typically, the archive database is located on cheaper storage devices.

**database to file**

A movement in which data goes from an active database to a file (XML, JSON or CSV format), which is offline but still accessible through SQL using the archive query server and a client tool of your choice.

**deployment assistant**

The user interface component within Designer used to deploy or generate business flows.

**description**

A technical description created by the developer for her own reference. These descriptions do not appear in the generated PDF file for the cartridge or business flow.

**Designer**

The user interface component used to develop, test, and deploy your archiving solution. Designer is a powerful graphical development environment for archive solutions.

**distributed instance**

A configuration option for database-to-database archiving where the data you archive is stored

on a separate database from the source or active database.

**DRE**

See [Dynamic Reasoning Engine \(DRE\)](#).

**driving table**

A driving object is a root of a model hierarchy. Its relationship to the child tables drives the selection of transactions.

**dynamic list of values**

A list of values for a parameter that obtains its members from a SELECT statement that returns identifiers and labels.

**dynamic parameter**

A type of parameter that has its value set by a Groovy script that runs at deployment time to obtain a value. For example, this type of parameter can supply the type or version of a database or application, which can be obtained programmatically at deployment time.

**Dynamic Reasoning Engine (DRE)**

A platform technology that uses high performance pattern-matching algorithms to search for content stored in Micro Focus repositories. Performs core information operations for contextual analysis and concept extraction, enabling solutions for the categorization, summarization, personalization, hyperlinking, and retrieval of all forms of information.

**environment**

The source and (optional) target credentials against which you plan to run commands. You can define multiple environments within your installation to identify various source and target databases.

**error**

One of the ways in which you can interrupt a business flow. Error indicates that the business flow failed for some reason.

**exclusive rules**

One of the ways in which Structured Data Manager determines whether to include or exclude rows from the archive operation. Exclusive rules require all rows in the constraint table to match for inclusion. Exclusive rules

exclude the instance if the condition on any child is false, like STATUS='CLOSED'.

**exit**

One of the ways in which you can interrupt a business flow. You can exit successfully or with a warning.

**export**

The way that you save an Structured Data Manager project to an exchange format (.hdp) from the File menu. See also *import*.

**export data**

The way that a user can send data to CSV format from Preview using the toolbar item.

**generate documentation**

The process of collecting and grouping all annotations into a PDF file that also describes the business flow or cartridge structure.

**history schema**

For database-to-database archiving, the schema in the target database where the archived data is stored.

**IDOL**

See [Intelligent Data Operating Layer \(IDOL\)](#).

**import**

The way that you transfer projects from exchange format (.hdp) into the Project Navigator. You can also use import to migrate cartridges created in 5.1 to 6.x. See also *export*.

**inclusive rules**

One of the ways in which Structured Data Manager determines whether to include or exclude rows from the archive operation. Inclusive rules require only one row in the constraint table to match the rule and be included. Inclusive rules include the instance if the condition on any child is true, like PRODUCT\_RECALLED='Y'.

**indexing cartridge**

A cartridge that indexes your data for better searching. For example, you might associate an indexing cartridge with a database-to-file archiving cartridge to improve performance when querying the archive data files.

**Intelligent Data Operating Layer (IDOL)**

An information processing layer that collects indexed data from connectors and stores it in a structure optimized for fast processing and retrieval, integrating unstructured, semi-structured, and structured information from multiple repositories.

**interrupt**

The way to stop or pause a business flow (pause, error, exit with warning, exit successfully).

**local deployment**

The generation and deployment of your cartridge or business flow to an environment on your local, Designer client. Deployment files are generated locally and then deployed to the designated, local environment.

**lookup table**

A table that contains helpful non-transactional information. For example, non-transactional information could be status definitions, or the name of the sales representative.

**managed table**

A table in the model that is copied and then purged from the active database by a cartridge. Transactional, chaining, and driving tables in a model are all typically managed tables.

**model**

A model identifies the tables and table relationships representing a business entity or related business entities. A project can have multiple models. Each model contains a driving table and all of its child and descendent tables.

**model compatibility**

Each model in your project can have one or more dynamic parameters associated with it to verify the compatibility with the target environment. If the compatibility parameter returns false, then the cartridge referencing the model will not deploy or run and throw an error. For example, the script could return false for Oracle 10.2 and true for Oracle 11.1 to indicate that a cartridge referencing the model can only deploy and run against Oracle 11.1.

**model-based cartridge**

A cartridge that moves data based upon a defined data model with relationships. This type of cartridge is typically used for ongoing archive operations.

**non-intrusive environment**

In a non-intrusive environment, data is archived without an interface schema and a generic JDBC driver is used. A non-intrusive environment enables you to copy or archive data from read-only sources, which is especially helpful in cases where the data is associated with older technologies that might not support basic SQL statements or when the database administrator or company policy prohibits write access to the production environment.

**OLTP database**

The online transaction processing database that typically is your active or source database.

**pause**

One of the ways in which you can interrupt a business flow. Pausing suspends the business flow while awaiting operator intervention.

**reload**

The act of taking data from an archive data store and loading it into the active database.

**remote deployment**

The generation and deployment of your cartridge or business flow to an environment on a system that is remote from your Designer client. Deployment files are generated locally and then deployed to the designated, remote environment.

**repository**

The location that holds business flow metadata, product configuration data, and data collected during runtime. The repository can be located on your active database or another logical database.

**rule**

Qualifications added to the model in order to include or exclude data based on certain criteria. For example, you might add a rule to

exclude from archiving any orders that are not yet closed.

**runtime parameter**

A type of parameter that has its values set by the operator executing the job in Console or on the command line. Typically, this type of parameter represents operational values that tend to change frequently and therefore need to be set each time the job is run.

**schema-based cartridge**

A cartridge that moves data based upon the database schema rather than a defined data model with relationships. This type of cartridge is typically used for database retirement or the cleanup of orphan tables.

**selection**

The form of data selection to use (standard or advanced) for choosing data. When deploying a cartridge or adding it to a business flow, you must specify the selection method.

**single instance**

A configuration option for database-to-database archiving where the data you archive is stored on the same database (Oracle) or the same server (SQL Server) as the source or active database.

**source**

The location (database) from which you are copying or moving data.

**SQL access server**

See *archive query server*.

**standard selection**

A method of data selection that restricts itself to the rows identified by the model. Unlike advanced selection, it does not attempt to traverse related rows across multiple tables.

**structured records management**

A type of solution that extracts structured data from a source application and moves it into XML format. The XML is then ingested into the corporate records management system for long term management and eventual disposal according to corporate policy.

**table use**

A database table, view, or synonym that is referenced in Designer, for example, in the model. The same table can be used multiple times in a model. For example, a table could be appear as a transactional table and a lookup table in the same model.

**target**

The location (database or XML) to which you are copying or moving data.

**tier**

A level in your database archiving configuration. You can have two- or three-tiered configurations. In a two-tiered configuration, tier one contains your active database and tier two your archive data store, which can be a database or XML. In a three-tiered configuration, tier one contains your active database, tier two an archive database, and tier three XML.

**transactional data movement**

Transactional movement uses set-based data movement and is the default method of movement.

**transactional table**

A table that contains information about the business transaction. For example, a transactional table might contain detailed tax or payment information related to each business transaction.

**unique identifiers (UIDs)**

A 16 hexadecimal identifier calculated based on the content of a Designer file. This value is used to determine if the user has customized key pieces of a project.

**unmanaged table**

A table in a model that is copied but not purged from the active database by a cartridge. Lookup tables in a model are typically unmanaged tables.

**Vertica**

Column-oriented SQL database management software for storing and analyzing structured data. Used to manage large, fast-growing volumes of data and provide fast query

performance for data warehouses and other query-intensive applications.

**virtual constraint**

A constraint that you define in Designer that only exists within Structured Data Manager.

**Web Console**

A browser-based interface where you can create and manage your deployment environments, and deploy, run, administer, and monitor your business flows.

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