JD Edwards EnterpriseOne Tools

Software Updates Guide

Release 8.98 Update 4

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JD Edwards EnterpriseOne Tools Software Updates Guide, Release 8.98 Update 4

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Contents

4 Using Change Assistant

5 Running Software Updates

6 Using the Software Update Impact Analysis Tool

7 Custom Modifications and Packages

8 Updating Environments

A   Setting Up Localizations

Glossary

Index

Preface

Welcome to the JD Edwards EnterpriseOne Tools Software Updates Guide.

Audience

This guide is intended for system administrators and technical consultants who are responsible for working with software updates and Change Assistant.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/us/corporate/accessibility/index.html.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/support/contact.html or visit http://www.oracle.com/accessibility/support.html if you are hearing impaired.

Related Documents

You can access related documents from the JD Edwards EnterpriseOne Release Documentation Overview pages on My Oracle Support. Access the main documentation overview page by searching for the document ID, which is 876932.1, or by using this link:

https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&id=876932.1

To navigate to this page from the My Oracle Support home page, click the Knowledge tab, and then click the Tools and Training menu, JD Edwards EnterpriseOne, Welcome Center, Release Information Overview.

This guide contains references to server configuration settings that JD Edwards EnterpriseOne stores in configuration files (such as jde.ini, jas.ini, jdbj.ini, jdelog.properties, and so on). Beginning with the JD Edwards EnterpriseOne Tools Release 8.97, it is highly recommended that you only access and manage these settings for the supported server types using the Server Manager program. See the Server Manager Guide on My Oracle Support.

Conventions

The following text conventions are used in this document:

Convention	Meaning
Bold	Indicates field values.
Italics	Indicates emphasis and JD Edwards EnterpriseOne or other book-length publication titles.
Monospace	Indicates a JD Edwards EnterpriseOne program, other code example, or URL.

1

Introduction to Software Updates

This chapter contains the following topics:

- Software Update Overview
- Implementing Software Updates

1.1 Software Update Overview

JD Edwards EnterpriseOne Software Update distributes the following four types of updates.

- Electronic Software Update (ESU) is a fix to problem reported on a specific JD Edwards EnterpriseOne application or report. The Update Center is the distribution point for all ESUs.

- Application Software Update (ASU) is a set of enhancements for a specific functional area of EnterpriseOne applications. An ASU is distributed on CD and available on the Oracle edelivery.oracle.com site.

- Service Pack (SP) is a group of all currently available fixes and in some cases, enhancements. The service pack is distributed on CD and available from the Oracle edelivery.oracle.com site.

- Tools Release is a group of all fixes to JD Edwards EnterpriseOne foundation (System) code.

All are installed on the deployment server, deployed to a path code, merged with custom code as necessary, and validated before rollout to production users.

1.1.1 Using My Oracle Support

My Oracle Support is your link to customer support functions, the latest release information, and the Update Center. Select the Patches and Downloads tab and JD Edwards Products link to access the Update Center. Link to the Update Center to research and download updates for the entire line of Oracle's JD Edwards EnterpriseOne products.

1.1.2 Using Update Documentation

Each software update includes documentation that describes the contents of the update and includes instructions specifically related to that update.

For an ESU, the documentation is in the form of an HTML document (JJ12345.htm) packaged within the download or accessible online before downloading. This document includes a list of SARs fixed by the update, the list of objects modified in the

update and a section detailing special installation instructions to implement the fix. Each ASU and Service Pack distribution CD includes a cover letter in PDF format. Read the cover letter before installing the update.

The cover letter includes this information:

- An overview of the installation process.

- Information related to running the update application.

- Manual steps specific to the update (for example, processing option and application setup).

- Other Software Updates that must be applied before or after the Software Update from the CD.

- Any changes to Minimum Technical Requirements (MTRs) required by this update.

Each Tools Release includes an HTML document detailing SARs fixed by this release, installation instructions, and special considerations for this release.

1.2 Implementing Software Updates

All JD Edwards updates follow this basic process flow:

1. Prepare for the update.

2. Acquire the update from the appropriate source.

3. Install the update on the deployment server.

4. Deploy the update to the Pristine and Development environments.

5. Retrofit custom modifications and complete specific tasks relevant to the update.

6. Validate the applied update in a safe environment.

7. Rollout the update to production users.

2

Preparing for a Software Update

This chapter contains the following topics:

2.1 Understanding the Update Process

To update JD Edwards EnterpriseOne successfully, complete the following checklist before starting the update process:

- Complete a thorough Impact Analysis to consider the benefits and costs of applying each update.
- Prepare the prototype environment.
- Prepare the development environment.
- Check modification and merge flags.
- Backup critical data.
- Verify custom changes in master control tables.

> **See Also:**
>
> - Chapter 6, "Using the Software Update Impact Analysis Tool".

2.2 Performing an Impact Analysis

Before you deploy any update, complete a thorough analysis of the benefits and costs associated with each update. Not all updates are relevant to your business or to the way you conduct your business. Careful planning at this stage is critical to the success of applying an update. It is recommended that you perform the impact analysis in two phases:

1. Perform a rough cut by reviewing SARs associated with the update. This review will help you determine if the update is relevant to your needs.

2. If you determine that an update is relevant, download and install it to your deployment server. Use the Impact Analysis tool to conduct a thorough review, or apply and run the update in the Pristine environment (PS900).

The Impact Analysis tool provided with JD Edwards EnterpriseOne helps perform an impact analysis. A key feature of this tool is a list of the objects in the update that you have modified. You must reapply the modifications using the JD Edwards ER Compare tool.

> **See Also:**
>
> - Chapter 6, "Using the Software Update Impact Analysis Tool".

2.3 Knowing what an Update Preserves and Replaces

This section discusses the considerations that are important if your business requires custom modifications. An update does not change or delete any new JD Edwards EnterpriseOne object you create. However, if you modify a standard JD Edwards EnterpriseOne object or interface to an object, there may be an impact to your modifications when applying an update.

These rules describe which of your modifications the update process preserves and which modifications the update replaces.

1. "Preserve" means that during an update you do not lose your custom modifications when the software you currently have installed automatically merges them with the new JD Edwards EnterpriseOne applications shipped with the update. If there is a direct conflict between your specifications and JD Edwards EnterpriseOne specifications, the update process uses your specifications. When there is no direct conflict between the two, the update process merges the two specifications.

2. "Replace" means the update replaces your modifications and does not merge them into the update. You will need to redo your custom modifications after the update completes.

> **Note:** If possible, transfer all modifications to one path code. Do this only if you have tested and approved all modifications or if you have modifications only in development. Having only one environment to update significantly shortens the process.

To ensure an accurate and predictable update, follow these rules as you modify your JD Edwards EnterpriseOne objects.

2.3.1 Interactive Application Rules

Do not delete controls, grid columns, or hyperitems on existing JD Edwards EnterpriseOne applications; instead, hide or disable them. The updates might use these items for calculations or as variables, and deleting them might disable major functionality.

The update process replaces the current application that resides in your Central Object database. Use Oracle's JD Edwards ER Compare to restore custom changes. This set of tools helps you restore custom changes to:

- New hyperitems.

- New controls and their event rules.

- New grid columns.

- Any style changes, such as fonts and colors.

- Any code-generator overrides.

- Data dictionary overrides.

- Location and size changes for controls.

- Sequence changes for tabs or columns.

An update replaces custom forms on existing JD Edwards EnterpriseOne applications.

2.3.2 Report Rules

These rules apply to report specifications that were created using Report Design.

An update preserves these changes:

- New reports.

- New objects to existing reports, including:

- Constants.

- Alpha variables.

- Numeric variables.

- Data variables.

- Runtime variables.

- Database variables.

- Dictionary variables.

- Any style changes, such as fonts and colors.

- Location and size changes for objects.

- Data dictionary overrides.

An update replaces custom sections on existing reports.

2.3.3 Application Text Changes

An update preserves overrides done in Oracle's JD Edwards EnterpriseOne Form Design Aid (FDA), Report Design, or Interactive or Batch Vocabulary Overrides.

2.3.4 Table Specification Rules

An update merges your table specifications from one release level to the next.

An update preserves these changes:

- New tables

- New indexes

An update replaces columns added or removed from existing JD Edwards EnterpriseOne tables. This includes changing field length, field type, and decimal position.

Instead of adding a new column to an existing JD Edwards EnterpriseOne table, use Oracle's JD Edwards EnterpriseOne Table Design Aid to create a second table that has the same key as the first table and add your modifications to the new table. Use system codes 55 -59. For custom tag files, be aware of data item changes in the JD Edwards EnterpriseOne data dictionary. From one release to the next, JD Edwards

EnterpriseOne might change certain data item attributes, such as data item size, which can affect data integrity and how data is stored in the database.

For this reason, you might need to use Oracle's JD Edwards EnterpriseOne Table Conversion tool to convert the tag file data to the new release level. For base tables, the update process takes care of the data dictionary changes by upgrading the JD Edwards EnterpriseOne database to the new release level.

An update preserves custom indices over the custom tag files.

See *JD Edwards EnterpriseOne Tools Development Tools: Data Access Tools Guide*.

2.3.5 Control Table Rules

An update merges your control tables during an update using the Change Table process, a delta between the base product and the update, as the basis to do the data merge.

An update preserves these changes:

- Data dictionary custom changes, such as changes to row, column, and glossary text. The update process uses your data dictionary as the base. If there is a conflict with JD Edwards EnterpriseOne data items, your changes override them.

- User-defined codes. The update process merges any new hard-coded JD Edwards EnterpriseOne values. (Values owned by JD Edwards EnterpriseOne are system 90 and higher, and H90 and higher.) The process also reports any JD Edwards EnterpriseOne hard-coded values that conflict with your custom values.

- Oracle's JD Edwards EnterpriseOne Workflow. The update process merges any JD Edwards EnterpriseOne additions, updates, or deleted workflow processes in your data. If there is a conflict with your workflow processes, JD Edwards EnterpriseOne overrides them.

2.3.6 Business View Rules

Do not remove columns from existing business views. Changing business views that applications use can cause unpredictable results when you run the application. If you need to hide columns, do so at the application design level using either FDA or Report Design. Performance is not greatly improved by deleting a few columns from a business view.

An update preserves these changes:

- New custom business views.

- New columns, joins, or indices to the existing business views.

An update replaces columns that you have removed from JD Edwards EnterpriseOne business views.

2.3.7 Rules for Event Rules

An update replaces all modifications that you have made to applications, including custom event rules. Use FDA and ER Compare to restore your customizations after an update.

An update replaces modifications that you have made to JD Edwards event logic in reports, tables, and Named Event Rules (NER).

An update preserves new, custom logic that you have added to reports, tables, and NER on events with no previous or current JD Edwards logic.

2.3.8 Data Structure Rules

An update preserves all of these custom data structures:

- Forms
- Processing options
- Reports
- Business functions
- Generic text

An update replaces these custom modifications to JD Edwards EnterpriseOne data structures:

- Forms
- Processing options
- Reports
- Business functions
- Generic text

2.4 Preparing Environments for Update

This section discusses how to:

- Prepare the prototype environment.
- Prepare the development environment.
- Check the modification and merge flags.
- Verify custom changes in master control tables.
- Back up servers and databases.
- Prepare the localization update.

2.4.1 Preparing the Prototype Environment

This table lists the requirements for preparing the prototype environment.

Task	Details
Personnel	Installer or system administrator
Logon status	On the deployment server, in the deployment environment, logged on as user JDE with the database password for user JDE.
Prerequisites	None
Concurrent Tasks	None

To make sure you retain all modifications from the base prototype environment, complete these tasks:

- Transfer all tested and approved modifications to the base prototype path code.
- After the transfer finishes, build a prototype package.
- Deploy the prototype package to workstations you want to run at the base release.

■　　Verify the Central Object Database is large enough to accommodate the update.

2.4.2 Preparing the Development Environment

This table lists the requirements to prepare the development environment.

Task	Details
Personnel	Installer or system administrator
Logon status	On the deployment server, in the development environment, logged on as user JDE with the database password for user JDE.
Prerequisites	None
Concurrent Tasks	None

To make sure you retain all modifications from the base development environment, complete these tasks:

■　　Make sure that all work in progress is checked into the development path code. From a development workstation, use the Promotion Manager or your own query or report to verify that objects are not checked out.

■　　Build the development package in preparation for deployment to one or more workstations.

Deploy the development package to one or more workstations. You will use these workstations later to help verify that all modifications were carried forward to the new release.

While you update, you cannot make any modifications (except changes to custom business functions written in C language) to carry forward to the next release.

Verify the Central Object Database is large enough to accommodate the update.

> **See Also:**
>
> ■　　"Understanding Objects" in the *JD Edwards EnterpriseOne Tools Package Management Guide*.
>
> ■　　"Building Packages" in the *JD Edwards EnterpriseOne Tools Package Management Guide*.

2.4.3 Checking Modification and Merge Flags

This task ensures that your modifications are carried forward to the new release. Before you update, perform these steps to review or set the modification flags on the Object Librarian records for all modified objects.

Do not run the Specification merges until you check the flags for all path codes containing modified objects.

2.4.3.1 Check modification and merge flags:

This table lists the requirements for checking modification and merge flags.

Task	Details
Personnel	Installer or system administrator

Task	Details
Logon status	On a workstation that accesses Object Librarian tables, or from the deployment server, in the deployment environment.
Prerequisites	Make sure you have prepared your environments for the update.
Concurrent Tasks	None

Log onto a workstation or to the deployment environment on the deployment server.

From the Advanced Operations (GH9611) menu, select Specification Merge Selection (P98401).

1. On Specification Merge Selection, complete these fields:

   ■ **Location**

   Type the name of the deployment server that contains the central objects specifications.

   ■ **Path Code**

   Type the name of the associated path code (prototype or development).

2. On the QBE line, type **C** in the Mod Flag field to list the changed objects, then click Find.

3. For each object that appears in the grid, verify that the Mod Flag field is set to **C**, and the Mrg Opt field is set to **1** (merge), which ensures that the modifications are merged when the specification merges run during the update workbenches.

   Do not set the Mrg Opt field to **1** unless you want objects merged or saved.

4. When you finish reviewing or modifying the records, click Close.

To verify the accuracy of modifications, some additional queries are strongly recommended to avoid missing any modified objects. For example, SY = 55 - 59.

> **Note:** You can also print Oracle's JD Edwards EnterpriseOne Object Librarian Modifications Report (R9840D), which lists all added and modified objects. After the update finishes, review this report to verify whether the object modifications were carried forward to the new release. For more information about the JD Edwards EnterpriseOne Object Librarian Modifications report, see Reports in the Installation Reference Guide.

2.4.4 Verifying Custom Changes in Master Control Tables

This table lists the requirements to verify custom changes in master control tables:

Task	Details
Personnel	Installer or database administrator
Logon status	On the workstation, for each applicable environment, logged on as user JDE with the database password for user JDE.
Prerequisites	None
Concurrent Tasks	None

1. Verify that these master control tables for the data dictionary reside in a relational database accessed by the Data Dictionary data source:

   – F9200

   – F9202

   – F9203

   – F9207

   – F9210

   – F9211

   – F9212

   – F00165 (GT92002)

2. Verify that these master control tables for Solution Explorer tasks reside in a relational database accessed by the Control Tables - Production data source (for production) or Control Tables - CRP (for prototype environments) or Control Tables - Test (for the development environment):

   – F9000

   – F9001

   – F9002

   – F9005

   – F9005D

   – F9006

   – F9006D

   – F9020

   – F9022

   – F9050

3. Verify that these master control tables for user-defined codes reside in a relational database accessed by the Control Tables - Production data source (for production) or Control Tables - CRP (for prototype environments) or Control Tables - Test (for the development environment).

   – F0004

   – F0005

4. Verify that these master control tables for workflow reside in a relational database accessed by the Control Tables - Production data source (for production) or Control Tables - CRP (for prototype environments) or Control Tables - Test (for the development environment).

   – F98800

   – F98800D

   – F98800T

   – F98810

   – F98810D

   – F98811

- F98830

- F98840

- F98845

5. Verify that the media objects queue paths are configured correctly.

    Use P98MOQUE from the deployment server in both the JDEPLAN and DEPSRV environments.

2.4.5 Backing Up Servers and Databases

Before beginning the software update, back up the entire deployment server, the enterprise server (the complete directory structure for the base installation), and the Oracle or SQL Server databases.

2.4.6 Preparing the Localization update

If you are a Localization customer, you must complete all the tasks in Appendix A: Setting Up Localizations. These tasks describe how to set up the software to automatically handle all future updates to the localization that are installed by ESUs.

3

Installing Updates on the Deployment Server

This chapter contains the following topics:

- Section 3.1, "Understanding the Deployment Server Installation"
- Section 3.2, "Using Update Center to Acquire Updates"
- Section 3.3, "Using Oracle Electronic Product Delivery to Acquire Updates"
- Section 3.4, "Installing the Software Update on the Deployment Server"

> **Note:** For ASUs, service packs, and tools releases, follow the instructions included with each update.

3.1 Understanding the Deployment Server Installation

The Deployment Server is the central hub for distribution of Oracle's JD Edwards EnterpriseOne objects to servers and users. The update process delivers changes to the deployment server to integrate with that distribution process. Each update type has a slightly different method of completing this task but the outcome is the same.

The installation process for the deployment server includes these tasks:

- Acquiring the update from the Update Center, Oracle Distribution or Oracle Electronic Product Delivery (EPD) system.
- Installing the objects from the CDs or the Web.

3.2 Using Update Center to Acquire Updates

Link to the Update Center through My Oracle Support or use Oracle's JD Edwards EnterpriseOne and World Change Assistant from your desktop to acquire all ESUs and updates for other Oracle JD Edwards EnterpriseOne and World products. JD Edwards EnterpriseOne and World Change Assistant streamlines the update process. This versatile new tool simplifies the installation and deployment of ESUs and other updates.

> **See Also:**
>
> - Chapter 4, "Using Change Assistant".

3.3 Using Oracle Electronic Product Delivery to Acquire Updates

If you already have JD Edwards EnterpriseOne 9.0 software and want to acquire an update, go to the Oracle Electronic Product Delivery (EPD) website at

http://edelivery.oracle.com, or contact your local Customer Care Center. EPD enables you to obtain your software electronically via Oracle's Electronic Delivery website. At this site, you will find instructions for use, available languages, access to download software, and a list of releases that are available for download.

3.4 Installing the Software Update on the Deployment Server

The following process installs the software update on the deployment server. This installation may be from a CD or a download from the Update Center via My Oracle Support or JD Edwards EnterpriseOne and World Change Assistant.

Before you run the installation program, shut down all programs running on the deployment server that could cause Dynamic Link Library (DLL) conflicts (such as Internet Explorer or Adobe Acrobat Reader).

3.4.1 Install the software update on the deployment server:

This table lists the requirements for installing the software update on the deployment server:

Action	Tasks
Personnel	Installer
Logon status	Logged on to the deployment server with administrator rights. You must log off JD Edwards EnterpriseOne before completing this task.
Prerequisites	You must create the JDE user.
Concurrent Tasks	None

To download ESUs from the Update Center not using JD Edwards EnterpriseOne and World Change Assistant:

1. Locate the downloaded JJnnnnn.exe file.

2. Double-click the JJnnnnnn.exe file. The Installation Setup Screen appears.

3. Click Next, the package size is calculated. The Installation Setup Type appears.

4. Click Finish.

To install ASUs from a CD:

1. Insert the setup CD into the CD drive.

2. Double-click the InstallManager.exe file. The Installation Setup Screen appears.

3. Click Next, and the package size is calculated. The Installation Setup Type appears.

4. Click Finish.

> **See Also:** ▪Chapter 4, "Using Change Assistant".

> **Note:** After completing this step, the update is ready to deploy to an environment. JD Edwards EnterpriseOne updates (ASU and ESU) are located in a folder under the Planner path code (..\Planner\Package\package name).

> **Note:** Complete your Impact Analysis at this time and then continue with deployment using JD Edwards EnterpriseOne and World Change Assistant, the JD Edwards EnterpriseOne Software Updates application, or special instructions included with your update.

4

Using Change Assistant

This chapter contains the following topics:

- Section 4.1, "Understanding Change Assistant"
- Section 4.2, "Installing the Java Runtime Engine"
- Section 4.3, "Installing Change Assistant"
- Section 4.4, "Viewing SAR/BUG Details"
- Section 4.5, "Searching for Software Packages"
- Section 4.6, "Working with Packages"
- Section 4.7, "Working with Batches"

4.1 Understanding Change Assistant

The JD Edwards EnterpriseOne and World Change Assistant is a standalone Java application that helps you manage, download, and deploy JD Edwards EnterpriseOne packages. Change Assistant provides a single point of entry to facilitate administration of software updates and fixes. You can download Change Assistant from the Oracle JD Edwards EnterpriseOne Update Center by clicking the Download the Change Assistant Application link.

You can access the Update Center by using the following navigation from My Oracle Support:

My Oracle Support | Patches and Downloads tab | JD Edwards Products

4.2 Installing the Java Runtime Engine

Change Assistant requires either Java Runtime Engine (JRE) 1.5.0_03 or a higher version, or JRE 1.6 Update 2 or a higher version. If you do not have an appropriate version of JRE installed, you will not be able to use Change Assistant. You can download and install the Java Runtime Engine by navigating to the Sun Java website. The Change Assistant Launch page provides the link to launch the application via Java WebStart.

> **Caution:**   Do not use JRE 1.5.0_06, JRE 1.5.0_07, JRE 1.5.0_08, or JRE 1.6 Update 1.

If you have problems after installing the JRE, Oracle recommends that you manually remove all existing JREs and start over.

4.3 Installing Change Assistant

You download Change Assistant from the Update Center.

When the installation is finished, a Preference wizard opens, prompting you for preferences for setting up Change Assistant. If you already have Change Assistant installed, or if the Preference wizard does not appear when installing Change Assistant, you can launch Change Assistant from your desktop. You can change or set up your preferences by selecting Preferences from the Edit menu.

The Preference wizard provides an option for you to choose whether the Preference wizard always appears upon startup of the tool. If you choose to have the Preference wizard always appear, you are prompted for your Update Center password each time you launch Change Assistant.

To install Change Assistant:

1. Within Update Center, select Electronic Software Updates from the News and Links pane on the left.

2. Click the Download the Change Assistant Application link on the Update Center, Electronic Software Updates web page.

    The JD Edwards EnterpriseOne and World Change Assistant page opens providing information about Change Assistant features.

3. Click the "here" link in Step 2, under Installing Change Assistant.

    After Change Assistant installs, the Preference wizard opens prompting you for preference information.

4. For Update Center Authentication, enter your Update Center access information in these fields:

Field	Description
User ID	Enter your Update Center user ID.
Password	Enter your password.
User Name	Enter a user name.
Email	Enter your email address.
Phone	Enter your phone number.

5. If you want to disable the Update Center connection, select the Disable Update Center connection check box.

    Caution: If you select this check box, you will not be able to search for and download ESUs.

6. If you want to be prompted for your password each time Change Assistant starts, select the Always Prompt at Startup? option.

    This option is on all pages of the Preference wizard. If you change your selection on a future page, the change is reflected on all pages.

7. Click Next to open the next page of the Preference wizard, which prompts you for connection information.

8. The system provides default values for these Update Center Connection fields:

- Timeout

- Number of Retries

Oracle recommends that you use the default values.

9. If you access the Update Center through a proxy server that requires authentication, enter this information:

- User ID

- Password

- Domain

10. Click Next to open the next page of the Preference wizard, which prompts you for a directory location for downloads.

11. Enter the path to the directory where you want to store downloaded updates.

For example, C:\Change Assistant\Downloads.

This is the root folder for packages that are downloaded from the Update Center. Typically, this is a folder that is shared by all your Update Center users to avoid downloading the same packages multiple times. Packages can be organized into additional folders under this parent folder.

12. Select the Include Dependencies option to automatically include dependent packages in download and deployment requests.

13. Select Show News and Links at Startup to automatically display this information each time you launch Change Assistant.

If you select this option, the Show News and Links page appears each time you launch Change Assistant. If you do not select this option, Change Assistant opens with the tree structure. The News and Links page enables you to view content that is downloaded from the Update Center, such as breaking news, planner information, or minimal technical requirement (MTR) information.

14. Click Next to open the next page of the Preference wizard, which prompts you for Logging information.

15. Enter the directory for the activity Log files.

For example, C:\Change Assistant\Logs.

Deployment activity for downloads is kept in the log file directory. This includes information about download times and deployment times. This location is also used to hold information that is captured during the deployment of downloaded packages. You create the download log by searching your local downloads or by retrieving download audit information from the Update Center.

16. Select the Create Download Log from current downloads option if you want the system to automatically generate logs based on downloads in the download folder.

17. Select the Create Download Log from download audit history option if you want to create logs based on the Update Center audit history.

18. Click Next to open the next page of the Preference wizard, which provides licensing information.

19. Select the Always Accept option to hide the license agreement during the download process.

20. Click Finish.

Change Assistant is installed on your system with a shortcut available on your desktop.

4.4 Viewing SAR/BUG Details

The View SAR/BUG Details option appears within the Change Assistant tree structure. When you select View SAR/BUG Details, the SAR Details tab displays in the right pane. Enter the SAR or BUG you want to review and click on the Show Details button to retrieve the SAR or BUG information.

4.5 Searching for Software Packages

This section provides an overview of package searches and discusses how to:

■ Perform a search.

■ Analyze packages.

■ Run all queries.

■ Save search criteria for future use.

4.5.1 Understanding Package Searches

Package searches can be performed in various ways. You can use preexisting queries to find packages, or you can create your own query and save it for future use. The preexisting queries are organized by type, release, and business purpose within the Search for Packages tree structure under the JD Edwards folder.

Queries in the JD Edwards folder are updated each time that you launch Change Assistant.

When you choose one of the predefined queries, the system populates the fields in the Search pane. You can update these fields as needed or create your own query by populating these fields manually.

If you customize a query, you can save it for future use within the My Queries folder. Queries within the My Queries folder are persistent and do not get overwritten. You can configure the predefined queries with date ranges or other filters and save these searches in the My Queries folder or any subfolder therein.

You have the ability to run all queries inside a query folder. The queries will be run in the order that they appear in the tree, the results will be displayed on a single tab, and any duplications will be excluded.

You can customize any query folder that you have created under the My Queries folder using the Folder Options dialog. This enables you to designate a folder as an aggregate folder. An aggregate folder enables you to arrange the child queries in a particular order by simply dragging them to the desired location, while a regular query folder sorts the queries alphabetically. You can also use the Folder Options dialog to disable searching at the folder level.

> **Note:** When you use the Run All Queries option under an aggregate subfolder of JD Edwards, the results tab only allows you to download or download and deploy *all* of the packages in the order they appear in the grid.

When you perform a search, the results are displayed on the right side of the form. Only the first twenty matches are displayed, and the results count is displayed above the grid. You can use the Page at a time button or the All Results button to continue fetching the results. Each search that you perform creates a new results tab.

4.5.2 Performing a Search

Access Change Assistant.

1. Expand the Search for Packages node on the tree.

2. If you want to create a new query, use any of these fields on the Search pane to define your query:

Field	Value
Type	Specify the type of update you want to search for.
Release	Specify the release for the selected updated type.
Platform	Specify the target platform of the package.
Defect Category	Specify the defect category of a SAR in the package. Valid values are: ■ **All** ■ **Memory** ■ **Performance**
Name	Enter the name of the package. Valid values include a single name with a wildcard (*) and a comma-separated list of exact names.
SAR Number	Enter the name of a SAR contained in the package or a comma-separated list of SARs.
Object	Enter the name of an object contained in the package. Valid values include a single name with a wildcard (*) and a comma-separated list of exact names.
System Code	Enter a system code for a SAR or an object contained within the package. You can also enter a comma-separated list of exact names.
Description	Enter a description for the package or for a SAR or an object contained within the package. You can enter a string including wildcards (*).
Search by Dates	Specify whether you want to search over a range of dates or for a duration of time. ■ Duration: Specify how many days, weeks, or months you would like to include in the search. ■ Range: Specify a From Date and Through Date

3. If you want to use an Oracle JD Edwards predefined query, expand the JD Edwards folder to view a predefined set of queries and select a search.

4. Update the search criteria as needed to search by type, names, or dates.

5. Click the search button above the search criteria to run the search against the Update Center.

6. View the search results on the appropriate search tab on the right side of the screen.

7. To view details for a specific package, select the package.

The Package Details pane displays detailed information for that package, such as included SARs, objects, and dependency information.

8. View the package details below the search results by clicking the tab that corresponds to the information that you want to view.

   Select any of these tabs to view more information:

Tab Title	Description
SARs	Displays a list of all of the SARs included in the package. You can double-click on any of the SARs to see the SAR details.
Objects	Displays a list of all of the objects included in the package.
Objects by SAR	Lists the objects included in the package as well as the SAR with which they are associated.
Net Change	Lists the packages that are superseded by the selected package. Select the Compare button to see a comparison of the selected package and any of the superseded packages.
Dependencies	Lists any other packages upon which the selected package is dependent. These packages should be installed before the selected package.
Check Sum	When you select this tab, the system computes the checksum. This can be used after downloading a package in order to verify its integrity. The following two checksum algorithms are used: ■ MD5 ■ SHA-1

9. To close a specific results tab, right-click it and select Close from the pop-up menu.

10. Select Close All Results to close all results tabs.

4.5.3 Analyzing Packages

After finding a package, you can perform a net change analysis before you download the package.

To analyze packages:

1. On the search results tab, select the packages that you want to analyze and click the Analyze button.

2. If you have selected more than one package and you choose the Analyze with Downloads option from the Analyze drop-down list box, the selected packages are compared to the superseded list. Next, the most current download found is used to perform the net change analysis by comparing the most current download to previously downloaded packages.

3. If you select the Summarize All option from the Analyze drop-down list box, Change Assistant will summarize the selected packages and will not perform a net change comparison.

4. When the analysis finishes processes, a report appears. Review the report.

   Any manual special instructions are included in the report.

> **Note:** The Analyze option is only available when you are connected to the Update Center.

4.5.4 Running All Queries

To run all queries:

1. Select the folder for which you want to run the queries.

   > **Note:** If the Disable Folder Search check box has been selected within the Query Folder Options, you will not be able to search at the folder level.

2. Right-click and select Run All Queries to run all the queries in the selected folder and subfolders.

   Change Assistant will display the combined results of all the included queries.

4.5.5 Saving Search Criteria for Future Use

To save search criteria for future use:

1. Select one of the existing queries under the JD Edwards folder.
2. Configure the query as desired.
3. Click the Save Query button.
4. Specify the folder to save the query in within the My Queries folder.
5. Enter a name for the query.
6. Click the Save the Query button.

4.6 Working with Packages

This section provides an overview of package downloads and discusses how to:

- Change the downloads directory.
- Download packages.
- Extract packages.
- Transfer packages with FTP.
- Copy packages.
- Perform an impact analysis.
- Use Visual Compare for UDC descriptions and glossaries.
- Delete packages.
- Deploy packages.

4.6.1 Understanding Package Downloads

Once you have searched for your packages, the next step is to download the packages. Downloading the packages makes them available to work with on your machine. For

example, you can extract, transfer, copy, or deploy packages once they have been downloaded.

Your download folder structure appears in Change Assistant under the Work with Packages node. You can organize packages into subfolders based on release, package type, and platform. This allows for easy browsing, tracking, and management of packages. You could also further categorize the packages based on when they were downloaded.

To view your downloaded packages, select a downloads folder in the tree structure on the left side. The display on the right changes to display the packages contained in that folder in the Work with Packages grid. By default, only the packages that are immediate children of the folder selected in the tree are displayed in the grid. The Descendants option on the View menu allows you to display the contents of the selected folder and all the subfolders.

Clicking on the column in the grid header allows you to sort rows in ascending and descending order based on that column. You can also sort multiple columns by holding the Control key down while clicking on one or more column headers. Selected packages can be extracted, deployed, transferred to a different machine using FTP, or deleted, using the tool bar options.

4.6.2 Changing the Downloads Directory

To change the downloads directory:

1. Select File, Open Downloads Directory.

2. Enter the new downloads directory and click OK.

    > **Note:** The downloads directory must have read/write access. To access a PAR file on a CD or from the Oracle E-Delivery web site, copy the PAR file to a folder within the current downloads directory, or to a folder with read/write access. Then, change the downloads directory to the folder where you copied the PAR file.

3. To quickly switch back to previously used directories, select File, Recent Home Directories.

4.6.3 Downloading Packages

Packages in the Search Results grid are downloaded from the Update Center. The checked boxes in the first column of the grid specify those updates that have not been downloaded. This status is determined by local information that is taken from the download log. You can select which packages to download by manually checking or unchecking the check boxes in the first column. You can download multiple packages simultaneously by selecting more than one package in the Search Results grid.

To download packages:

1. Within the Search Results grid, select the packages you would like to download by placing a check mark in the first column.

2. Open the Download drop-down list box by selecting the down arrow next to the Download button.

3. To download the selected packages, select either the Download To option or the Download and Deploy To option from the drop-down list box.

The Download and Deploy To option provides a way to download and deploy all selected packages in one step.

4. Select your download folder from the list of previously chosen folders or select a new folder to which to download your packages.

> **Note:** During the download process, you have the ability to pause, resume, and cancel the download using the appropriate buttons in the bottom-right corner of the form. You can also view the progress of the download in the status bar at the bottom of the form.

5. If you selected to download and deploy in one step, you are prompted to sign into JD Edwards EnterpriseOne and then must enter your specific deployment information before starting the download.

   For example, deploying Electronic Software Update (ESU) packages from the JD Edwards EnterpriseOne deployment server requires the name of the target environment and other deployment options. An additional input dialog is displayed to prompt for these options.

   > **Note:** You must be on the deployment server in order to deploy the packages.

   See Deploying Packages.

6. View your downloaded packages by selecting Work with Packages and then Downloads from the tree structure.

7. If you think there may have been problems during the download process, you can perform a checksum validation to ensure the integrity of the downloaded package by selecting the Check Sum tab within the Package Details pane.

   When you select this tab, the system uses 2 algorithms, MD5 and SHA-1, to calculate checksum values for the downloaded package and compares these values to the original package. A green check mark appears next to each value if the checksum value for the downloaded package and the original package are the same. If there is a problem with the integrity of the package, you will see a red universal no symbol over a check mark next to the value.

4.6.4 Extracting Packages

If the downloaded package is a PAR file, you need to extract the contents of the package.

1. Select the Work with Packages node from the tree structure.

2. Select the Downloads node, and your downloaded packages appear on the Work with Packages tab.

3. Select the package to download and click the Extract button.

   When you click the Extract button, the contents of the package appear in a new Extract window in a tree structure or in a tabular form.

4. In the Extract window, select one or more files or folders to be extracted by selecting the corresponding check box.

   Selecting a folder automatically selects all of its contents.

5. To examine a file before extracting it, right-click the tree or grid and select Open/Launch.

4.6.5 Transferring Packages with FTP

To transfer packages with FTP:

1. On the Work with Packages tab, click the FTP button to display a dialog box.

2. Enter the information for the machine to which the selected packages are to be transferred.

3. Transfer the packages.

4.6.6 Copying Packages

To copy packages:

1. On the Work with Packages tab, select the package that you want to copy and click the Copy button.

2. Enter the target directory on the Select the Target Location form and click OK.

> **Note:** The target directory must allow write permission, and cannot be the same as the source directory.

4.6.7 Performing an Impact Analysis

To perform an Impact Analysis:

1. On the Work with Packages tab, select the packages for which you would like to perform an impact analysis.

2. Click the Impact Analysis button and the system will verify the selected packages as ESUs, extract the impact analysis document from the package deliverable, and import the impact analysis document into JD Edwards EnterpriseOne.

3. If you want to import impact analysis documents from the deployment server, select Impact Analysis from Deployment Server directory from the Impact Analysis drop-down list box.

4. Use the Impact Analysis Tool to review the changes for your selected software updates.

> **Note:** The Impact Analysis option is only available when JD Edwards EnterpriseOne is installed.

4.6.8 Using Visual Compare for UDC Descriptions and Glossaries

To use Visual Compare for UDC Descriptions and Glossaries:

1. On the Work with Packages tab, select the packages for which you would like to run Visual Compare.

2. On the Impact Analysis drop-down list box, select Visual Compare for UDC Descriptions and Glossary.

3. If you want to import impact analysis documents from the deployment server, select Visual Compare for UDC Descriptions and Glossary from Deployment Server directory from the Impact Analysis drop-down list box.

Change Assistant verifies that the selected packages are ESUs, extracts the automated special instructions document from the package deliverable, and imports only documents containing User Defined Codes or Glossaries into JD Edwards EnterpriseOne.

4. Use the Visual Compare for UDC Descriptions and Glossary Tool to review the changes and accept the changes for your target environment.

> **Note:** The Visual Compare for UDC Descriptions and Glossary option is only available when JD Edwards EnterpriseOne is installed.

4.6.9 Deleting Packages

To delete packages:

1. Click the Delete button.

2. Select Continue in the Delete Confirmation dialog box to delete the selected packages and the corresponding temporary folders from the local machine.

> **Note:** This process only deletes the file from your machine and does not affect deployment status. If the package was deployed, it will not be uninstalled.

4.6.10 Deploying Packages

Before deploying a package, you should check whether the prerequisites or dependencies for the package have been deployed. This information is displayed on the Dependencies tab.

When you click the Deploy button, the activity log is checked to determine whether any of the selected packages have been superseded. If so, a list of these packages is displayed. Also, the log is checked to determine whether all prerequisites for the selected packages have been deployed. If not, a list of these dependencies is displayed and you can continue or cancel deployment.

To deploy packages:

1. Select Deploy.

2. From the Deploy drop-down list menu, select one of these two options:

   – Deploy

   Select Deploy to search for a previous batch for the current object at an "in process" status. The system will restart that deployment where it left off or if it cannot find any batches with an "in process" status, it will start a new batch. This is typically used in an Oracle Business Accelerator (OBA) where there is a question and answer session that may require input from multiple sessions, but the "logical" session remains intact.

   – New Batch Deploy

   Select New Batch Deploy to start deployment of a new batch.

3. Select Run All to deploy all of the packages.

4. If multiple packages are selected, a new window is launched and the packages are deployed as an aggregate.

5. If a single package is selected and if the package is suitable for deployment, one of the following processes will occur, depending on the type of package that is selected:

- – If the package is a documentation package, the documentation link is displayed in a new documentation window, and clicking the link launches the associated application.

  If the link points to an HTML page that resides inside the package itself, it is directly displayed in the window.

- – If the package only contains some files that need to be extracted to the disk, the extract window is displayed.

- – If the package is a PAR file that contains some deployment tasks or is an EXE file, a new window is displayed that enables you to view the documentation for these tasks and run them.

  Configurations and packages with JD Edwards EnterpriseOne tables or objects are validated for their release level. If the source and target release do not match, a warning is displayed. If you choose to ignore this warning, you must give careful consideration to changed table formats, object dependencies, and so forth.

  During the deployment of configurations that contain versions, the Versions tab appears. Use this tab to change the version prefix. Enter the From Prefix and the To Prefix values in the grid.

  Note: The new prefix string must be the same length as the old prefix.

- – If the package is an ESU, a new window is displayed that prompts you to select the target deployment environments and the following deployment options:

Batch Deployment Option	Description
Backup	Select the backup check box to create a backup of object specifications included in the updates. Backups are used with the compare/merge tools to aid the retrofitting process and to examine changes made by the update. Backup is selected by default.
Environment	Select the environments to which you want to deploy the update. It is recommended to apply updates to the Pristine and Development environments using Change Assistant. After retrofitting custom objects, you can transfer the objects to the Prototype and Production environments using OMW.
Notes	Use this tab to add any runtime notes that you would like displayed on activity reports and during restart of a deployment.
Skip Spec Merge	Select this option if you would like to skip the spec merge for objects for a particular environment.
Skip OMW and Package Build Data	Select this option to skip the creation of OMW projects and package build definitions.

Batch Deployment Option	Description
Summary	Select this option to deploy the group automatically with minimal status information. If you do not select this option, you step through each task of the deployment with full status. The manual mode requires clicking the Run or Run All button before starting the deployment.
Unattended	Select this option to deploy a group of updates in a single process. If you do not select this option, you step through each task of the deployment manually (attended mode). The unattended mode requires no further input after clicking the OK button. The status of each update displays as the application runs.

4.7 Working with Batches

This section provides an overview of batches and discusses how to work with batch details.

4.7.1 Understanding Batches

A batch is created for each download, deployment, and delete action taken. All packages selected for the initial action are preserved in a single link to simplify future tasks with these same packages. You can research all packages that were downloaded in a batch by right-clicking the batch record. You can also use the Deploy button to deploy all packages that were previously downloaded in a batch.

You can use the following options when you are working with a batch:

- Deploy

   To deploy all the packages in the selected batch, click Deploy. If the batch contains one or more ESUs, you will be prompted to sign into JD Edwards EnterpriseOne.

- Export

   This feature is useful when you want to download packages to one machine and deploy them from another machine. For example, if your deployment server does not have access to the Update Center, you can download packages to a client and then export the packages to a Jar file. This file can then be copied to the deployment server and imported using the Import option.

- Import

   This option enables you to import packages to a machine from a jar file that was created using the Export option. The application prompts you to select the jar file from which you want to import the packages and to choose the directory to which you want to import the packages.

- New

   You can create a custom batch by clicking the New button on the Work with Batches grid. This enables you to group the previously downloaded packages together for the purpose of deployment or exporting.

- Delete

   Use this option to remove any batches that you do not need. This option removes only the batch information, not the packages themselves.

- Batch Summary

This option generates a summary report of all the actions that were performed on the highlighted batch. The report is displayed in the default browser.

4.7.2 Working with Batch Details

To work with batch details:

1. Select Work with Batches in the tree structure.

   A list of batches will appear in the Batches pane.

2. Select the batch that you want to work with.

   A list of packages included in that batch will appear in the Batch Details pane.

3. To add a package to the batch, select Add Package.

4. To remove a package from the batch, select Remove Package.

5. To view more information about one of the packages, select the package to highlight it, and select Package Summary.

6. To view a history of actions that were performed on the batch, select the Batch Actions tab.

   You can also restart deployment from the Batch Actions tab by clicking the Restart Deployment button.

5

Running Software Updates

This chapter contains the following topics:

5.1 Understanding Software Updates

After downloading the software update or updates, selecting the update to install, and selecting the environment to be updated, you choose to run the software update workbenches in either attended or unattended mode.

It is recommended that you use the JD Edwards EnterpriseOne and World Change Assistant to run software updates. However, if you choose not to use the JD Edwards EnterpriseOne and World Change Assistant (for example, if your company has fire walls that block your access), then use the methods discussed in this chapter to run updates.

You will use Oracle's JD Edwards EnterpriseOne Table Conversion Workbench if you are applying any Application Software Update (ASU).

Depending on the contents of the update, these workbenches may run:

- JD Edwards EnterpriseOne Control Table Workbench runs the batch applications for the planned merges that update the data dictionary (DD), user-defined codes (UDCs), menus, and workflow tables. It then updates the F98405 table to reflect completion, and writes a conversion log record to the F984052 Table Conversion History Log.

- JD Edwards EnterpriseOne Table Conversion Workbench runs the batch application that creates tables and indexes. It then updates the F98405 table to reflect completion, and writes a conversion log record to the F984052 Table Conversion History Log.

- JD Edwards EnterpriseOne Specification Table Merge Workbench runs the batch applications that update the specification tables. It then updates the F98405 table to reflect completion, and writes a conversion log record. The Object Librarian and Versions List merges are now a part of the specification merge.

- JD Edwards EnterpriseOne Package Workbench transfers the F9603 and F9631 Package Information tables from the Planner data source to the System - 900 data source. It then updates the Package Plan Detail table (F98404) to reflect completion.

5.2 Working with the Software Updates

The software update application combines a series of individual update workbenches into a single process. You will see only the workbenches that apply to your update.

You can run the workbenches manually (attended mode), or automatically (unattended mode). If you run the workbenches unattended, you will start the update as described. The status of each individual workbench will display as the workbench begins. Unattended mode is the default.

5.3 Starting and Running the Software Updates

This section provides an overview of starting and running the software updates and discusses how to:

- Select environments and start the software.

- Restore a backup.

5.3.1 Selecting Environments and Starting the Software Update

The following procedure lets you select environments and starts the software update workbenches in unattended mode or attended mode. Unattended mode is the default.

In unattended mode, if an error is encountered in any of the individual workbenches, the process stops. Fix the error and continue. The software update resumes.

This procedure also creates a JD Edwards EnterpriseOne Object Management Workbench (OMW) project, an installation plan, and an update package for this update. In addition, the procedure optionally creates a backup of specs, so that the original specs can be restored if necessary.

Do not lock the deployment server during the software update (for example, with a screen saver password) because doing so pauses some processes. In addition, do not minimize any of the workbench forms, or the software update will not continue to the next workbench form until it is again maximized.

If you use a SQL Server database, be sure that these database options are selected before you start the software update:

- Select Into/Bulk Copy.

- Truncate Log on Checkpoint.

This table lists the requirements for starting the update workbenches:

Task	Details
Personnel	Installer
Logon status	On the deployment server, logged on as user JDE with the database password for user JDE, in the JDEPLAN environment.
Prerequisites	Software update installed on the deployment server.
Concurrent Tasks	None

To select the environment and start the update workbenches:

On the deployment server, log on to the JDEPLAN (planner) environment as user JDE with the database password for user JDE.

From the System Installation Tools menu (GH9612), select Application Software Update, or Electronic Software Update, depending on the type of update you are installing.

1. On Work with Software Updates, select the software updates you want to install. You can select more than one update. Click Next.

   The Work with Software Updates panel presents these row exits:

   – Select

     Selects the software update, and puts a check mark in the media object column for the selected row.

   – Deselect

     Deselects the software update, and puts an X in the media object column for the selected row.

   – Update Detail

     Provides more information on the software update

   – Update Status

     Shows the statuses of the processes that run during the software update.

   – Update Sched Comp

     Displays all merges (DD Merge, Spec Merge, and so forth) that are scheduled for the software update.

   – Update Objects

     Displays all objects, SARs and dependencies that are part of the software update. Use this exit to check for dependent and baseline updates.

     Note: If you don't install the correct dependent or baseline updates, the system will display an error message.

   – Update Cntrl Table

     Displays all DD, UDCs, Menus, Favorites, Tips of the Day, and Report Director Templates that are delivered with the software update.

   – Update Table Changes

     Displays table changes delivered with the software update.

   – Update Index Changes

     Displays index changes delivered with the software update.

   – Update History

     Shows the environment and plan history of the software update.

   – Advanced Setup

     The program performs a series of common processes when each software update is run on the first environment. If you want to run these processes on a second environment, however, you must use this option to select processes that you want to run again. Note that you must clear the check boxes for the processes you want to run again.

   The Work with Software Updates panel presents these form exits:

- – Remove Updates

  Opens the Software Update Remove form where you can choose packages to remove. You can also select to remove files only or history and files.

- – Update Hist. Rpt

  Runs a report of all of the software updates that have been applied.

2. Double-click the environments where you want the software update installed.

3. If you want the software update to run in unattended mode, verify that the Unattended Workbench check box is selected. Unattended Workbench is checked by default.

4. If you want to make a backup of specs, so that the original specs can be restored, select the Backup check box. Backup is selected by default.

> **Note:** If you have custom modifications and will be retrofitting these to the new update, it is strongly recommended that you make a backup of your original specs. For more information about retrofitting, see Retrofitting Custom Modifications.

The Backup option creates a backup directory with the path **planner\package\software update name\PATHCODE.BAK** (for example, \planner\package\JL123456\DV900.BAK). All artifacts for the delivered objects (specs, source, include files) are stored in a single file with the extension .PAR. Control tables (data dictionary, UDC, and others) are not backed up. The contents of the backup file may be viewed with the JD Edwards EnterpriseOne Universal Table Browser tool or WinZip.

5. Select the Create OMW Project and Package Assembly check box if you want to create the OMW project and package assembly record for the software update.

The Software Update Environment Selection panel also presents these row exits:

- – Select

  Selects the environment to be updated, and puts a check mark in the media object column for the selected row.

- – Deselect

  Deselects the environment to be updated, and puts an X in the media object column for the selected row.

- – Affected Objects

  Use this exit to view:

  - – Objects that will be installed.

  - – SARs that will be installed to a specific path code.

  - – Checked out objects.

  - – Modified objects.

  - – Objects with tokens.

- – Restore Backup

  If backups were performed for a software update for a specific environment, this option restores all specs and business functions. Control tables are not

backed up and hence will not be restored. For information about restoring a backup, see Restoring a Backup.

– Delete Backup

Deletes the backup directory created, and frees up disk space. A warning message is displayed if no backup was performed.

– Advanced Setup

When applying software updates to alternate environments, we recommend that you do not perform the spec merge. Instead, transfer objects using OMW. However, this exit enables you to override this option and run the spec merge.

5.3.2 Restoring a Backup

Use this procedure to restore a backup you made while starting the software update. If you are not restoring a backup, skip this section and proceed to Completing the Update.

You can restore a backup if you selected the Backup check box on the Software Update Environment Selection panel, as described previously.

To restore a backup:

From the System Installation Tools menu (GH9612), select Application Software Update, or Electronic Software Update. The Work with Software Updates panel appears.

1. Select the software update for which you want to restore the backup.

2. Click Next. The Software Update Environment Selection panel appears.

3. Select the environment for which you want to restore the backup.

4. On the Row Exit menu, click Restore Backup. The backup is restored.

   This may take several minutes.

5. Click Cancel to close the Software Update Environment Selection panel.

Note: The restore process doesn't remove objects that were added through the software update. If you wish to remove the added objects, use the JD Edwards EnterpriseOne Object Management Workbench (OMW) project created by the software update. A list of added objects can be found in the software update spec merge report.

If you are restoring objects for a software update that you have already transferred to other path codes, make sure you re-transfer the restored specs to the other path codes using OMW. If you wish to remove the added objects in all path codes, use the OMW project created by the software update.

5.4 Completing the Update

This section provides an overview of the completion process for the attended mode and discusses how to complete these update workbenches:

- Add a Security Override for Running Table Conversions.

- Run Table Conversions.

- Configure your control tables.

- Merge your specification tables.

- Restart the Specification Merge.

- Configure your packages.

- Validate the update.

If you selected the unattended mode, the process begins and all workbenches are completed automatically. In this case, skip the following tasks and continue with "Custom Modifications and Packages."

When the workbenches are complete, an update package must be built.

When the software update begins, status messages appear in the status bar at the bottom of the screen reporting progress. If an error occurs, the process stops. In this case, click Previous to return to the Work with Software Updates screen, and then, on the Row menu, click Update Status. Status messages are displayed.

5.4.1 Adding a Security Override for Running Table Conversions

If your database is Oracle, SQL, or DB2 UDB for Microsoft Windows/Unix, you must add a security override so that the table conversion process can drop and recreate a table. Adding a security override must be done by a security administrator. To add a security override, you must first add a system user for the data source owner, and then add an override for the EnterpriseOne user who will run the table conversion.

To add a system user for the data source owner:

1. In P98OWSEC, select the form exit Add System User.

2. On Work with System Users, enter the appropriate data source owner (for example **PRODDTA,TESTDTA**, or **CRPDTA**) in the System User field and select Find.

3. If no values are returned, add the data source owner as a system user by selecting Add and completing the fields on the System User Revisions form:

   - System User

   - Data Source

   - Password

   - Password Verify

4. Click OK and then Cancel and Close to return to the Work with User Security form.

To add an override for an EnterpriseOne user who is going to run the table conversion:

1. On Work with User Security, enter the user who is going to run the table conversion, and select Find.

2. Select the Form exit, Add Data Source.

3. On Add Data Source, complete the User ID, Data Source, and System User fields.

> **Note:** This override can be deleted once the table conversion has run.

> **Note:** For iSeries, either sign on as a user who has *ALLOBJ rights to the table to be converted or complete the steps above, setting up a security override for the EnterpriseOne user so that when they connect to the data source, they connect as a system user (iSeries user profile) who has *ALLOBJ rights to the table.

5.4.2 Running Table Conversions

Table conversions are performed after applying the software update to the path code. Review the special instructions for the software update that you are applying to see if there are any table conversions.

> **Note:** You must be signed on as an administrative user who has rights to change security overrides.

To run table conversions:

1. Build and deploy an update package containing the software update changes.

2. Install the update package on an administrative client.

3. Sign onto the administrative client in the environment that had the changes applied.

4. For each table conversion that is going to be run, check which data source contains the base table that the table conversion is changing. The name of the table should be in the special instructions.

5. Add security overrides for the JD Edwards EnterpriseOne user who will run the table conversions.

   See Adding a Security Override for Running Table Conversions.

6. Go to Batch Versions and verify, on the Properties tab for the table conversions, that the input and output environments point to the login environment.

7. Run the table conversions.

8. Review the table conversion logs in the print queue, and verify that the table conversions completed successfully.

5.4.3 Configuring your Control Tables

If you are running the software update in unattended mode, this process is run automatically.

Complete this task to configure your control tables.

1. On Control Table Workbench, the system displays all control table merges in the detail area. From the Form menu, select Merge All.

2. After each merge finishes, verify the output of the report produced.

3. From Control Table Workbench, click Next.

5.4.4 Merging your Specification Tables

If you are running the software update in unattended mode, this process is run automatically.

To merge your specification tables:

1. On Specification Table Merge Workbench, from the Form menu, select Merge All.

2. After the merge finishes, verify the output of the report that is produced.

3. After all merges complete, click Next.

   The Package Workbench form appears.

5.4.5 Restarting the Specification Merge

If you are running the software update in unattended mode, this process is run automatically.

If the Specification Merge stops before it completes successfully because the merge of an object fails, you can restart it from the point where it stopped. If all merges complete successfully, you can skip this task.

To restart the Specification Merge:

This table lists the requirements for restarting the specification merge.

Task	Details
Personnel	Installer
Logon status	On the deployment server, logged on as user JDE with the database password for user JDE, in the JDEPLAN environment.
Prerequisites	Specification merge must be stopped.
Concurrent Tasks	None

Before you restart the Specification Merge you must set the status of the failed merge back to Not Processed (zero). The restarted Specification Merge will skip completed merges and process the failed merge and all subsequent merges.

Use this procedure to set the status of the failed merge back to Not Processed (zero):

From Advanced Operations menu (GH9611) select Specification Merge Status (P98700).

1. On the SpecMerge Status panel, complete these fields:

   - **Package Name**

     Enter the name of the software update.

   - **Source Environment**

     Enter JDEPLAN (the Planner environment).

   - **Target Environment**

     Enter the name of the environment you are updating.

2. Click Find. All objects that are part of the specification merge are displayed.

3. Select the object for which the specification merge failed. The object will have a status of 4 (Error) in the Merge Status column.

4. On the Row Exit menu, click Reset Merge Status. The Reset Merge Status panel appears.

5. In the New Merge Status field, specify **0** (zero, or Not Processed).

6. Click OK.

The object's merge status is changed.

7. Click Close.

You can now restart the specification merge.

5.4.6 Configuring your Packages

If you are running the software update in unattended mode, this process is run automatically.

Package Workbench transfers the F9603 and F9631 Package Information tables from the Planner data source to the System - 900 data source. It then updates the Package Plan Detail table (F98404) to reflect completion.

If you are running the software update in unattended mode, this process is run automatically.

Item	Details
Personnel	Installer
Logon status	On the deployment server, logged on as user JDE with the database password for user JDE, in the deployment environment (DEP900).
Prerequisites	None
Concurrent Tasks	None

1. On Package Workbench, review your packages.

2. From the Form menu, select Configure. The Congratulations form appears.

3. Click Finish. The Software Updates History report will appear.

> **Note:** After this screen appears, processing continues to occur in the background. Once completed the program displays a message that the update was completed successfully.

After this report appears processing continues in the background. Once this is completed, an Update Completion message appears.

4. Click OK.

> **See Also:**
>
> ■ Restarting the Specification Merge.
>
> ■ Reports in the *JD Edwards EnterpriseOne Application Release 9.0 Installation Guide*.

5.4.7 Validating the Update

After the spec merge process, JD Edwards EnterpriseOne generates the Software Update Report (R96701) that lists the updated objects and the SARs addressed by the update. This report is summarized in a PDF file that opens automatically once the update process is complete. If the spec merge process fails, this report is not created.

To validate the update process, view the R96701 report and note the value of the Object Install Flag for each of the objects listed in the report.

Object Install Flag value	Description
0	The object was not updated because the existing object in the environment is more recent that the object in the software update.
1	The object is selected to be applied to the environment. (This is the status of all objects in the list before the upgrade starts, but should not be observed when the update process is complete.)
2	Updated object was applied to the environment.

6

Using the Software Update Impact Analysis Tool

This chapter contains the following topics:

- Section 6.1, "Understanding the Software Update Impact Analysis Tool"
- Section 6.2, "Working with the Software Update Impact Analysis Tool"

6.1 Understanding the Software Update Impact Analysis Tool

Oracle's JD Edwards EnterpriseOne Software Update Impact Analysis Tool has been added to help manage your software update. This tool is used to gauge the level of impact a software update will have on your existing system. Users may access this tool from a client workstation or the deployment server.

You perform an impact analysis when you download ESUs. If you are performing a new installation, or if you are performing an upgrade, you do not need to do an impact analysis. If you do need to perform an impact analysis, you do so after you have installed the update on the deployment server, but before you deploy the update to another environment.

This is a list of features that this tool provides:

- Identification of what Software Action Requests (SARs), objects, and control files will be applied to the system.
- Special instructions for SARs.
- List of objects associations with a SAR.
- List of any dependent software updates.
- Identification of any table conversions within a software update.

It can also be used to manage the application of the software update to your system. A system administrator may assign specific objects, control files, and SARs to individual users. Users who have been assigned objects can update the status of approved objects, SARs, and control files that have been assigned to them. They can also keep track of the status of their approvals.

6.2 Working with the Software Update Impact Analysis Tool

This section provides an overview of working with the JD Edwards EnterpriseOne Software Update Impact Analysis Tool and discusses how to:

- Access the JD Edwards EnterpriseOne Software Update Impact Analysis tool.

- Utilize the JD Edwards EnterpriseOne Software Update Impact Analysis tool.

- Configure a new analysis.

- Analyze your software update.

- Review the results in the Impact Analysis - Master view.

- Assign objects to users.

- Notifying users of assignments by email.

- View any prerequisites prior to installing a software update.

- View objects that will be affected by the software update.

- Accept assigned objects.

- View SARs.

- View control files in the Software Update.

- Work with the Scheduler view.

- Work with the Analyze report.

6.2.1 Forms Used with the Software Update Impact Analysis Tool

Form Name	FormID	Navigation	Usage
SU Impact Analysis Master	W96710A	Software Updates, Software Update Impact Analysis	Use to access many of the features available within this tool.
Impact Analysis Setup	W96710B	Software Updates, Software Update Impact Analysis, SU Impact Analysis Master, Add	Use to configuring a new analysis.

6.2.2 Accessing the Software Update Impact Analysis Tool

Access the JD Edwards EnterpriseOne Software Update Impact Analysis Tool:

1. Logon to a JD Edwards EnterpriseOne client with administrative privileges.

2. In the fast path enter GH9612.

3. From the Software Updates menu, right-click Software Update Impact Analysis → Prompt For →Values.

4. Enter the path to the location of the update.xml file (for example, \\deployment server name\E900\ImpactAnalysis). Since this utility can be run from a client or the deployment server, it is important that the XML files are located in a central location. By default, the XML files will be downloaded to the unc path provided in the previous example by the installation of a software update.

5. Click OK.

6.2.3 Utilizing the Software Update Impact Analysis Tool

From the Software Updates menu (GH9612), select Software Update Impact Analysis (P96710).

> **Note:** Within this form, a list of earlier analyses are listed in the main work area. This is the core navigation screen that will enable you to access many of the features available within this tool.

6.2.4 Configuring a New Analysis

To configure a new analysis:

1. Click Add.

2. When creating a new report complete these fields:

   - **Software Update Name**

     Click the browse button to search for the software update you wish to analyze.

     Select the desired software update.

     Click the **Select** button on the tool bar. This will populate the Software Update Name field in the setup screen.

   - **Description**

     Enter additional details on this update in this field's text box.

   - **Environment Name**

     Enter the environment to do the analysis on (for example, DV900).

   - **Expected Completion Date**

     Enter the date you anticipate to complete the analysis.

   - **Percent Complete**

     Enter the percent complete for this update.

   - **Impact Analysis Status**

     Use the visual assist to select the status of the impact analysis (for example, 03 - In Process, 02 - Configure).

3. Click OK to return to the SU Impact Analysis Master screen.

6.2.5 Analyzing your Software Update

Access the JD Edwards EnterpriseOne Software Update Impact Analysis Tool: On the SU Impact Analysis Master screen, highlight the record that was created in the previous steps. Once this is completed click the Analyze row exit.

> **Note:** Once this step has been completed, analysis processing occurs in the background. This processing may take several moments. Once it is completed, a success message will appear in the status bar area.

6.2.6 Reviewing the Results in the Impact Analysis - Master View

From the SU Impact Analysis Master screen, select the Master View row exit.

The overall view of the analysis displays and includes:

- SARs.
- Objects and control files in SARs.

- What objects are affected or merged.

> **Note:** The master view should be accessible to the CNC administrative user only by enforcing security.

6.2.7 Assigning Objects to Users

Objects may be assigned to different users within this tool for further analysis.

1. To assign objects to users, select the Assign exit row.

2. Highlight the object you wish to assign and click the Select exit row.

   A check mark will appear to the left of the item you selected. Multiple records can be selected at once within this screen as well.

3. In the Assigned To text box, enter the address book number of the user who will receive the assignment.

4. To complete this process, select the Assign option from the row exit.

6.2.8 Notifying Users of Assignments by Email

Complete this task to notify users of their assignments by email.

1. Select the Form exit.

2. Select one of these row options:

   - Approval Report

     Shows the latest states of what users have done with objects.

   - Notify all

     Sends a global email notification to all users that have been assigned objects (past and present).

   - Notify today's assigners

     Sends an email notification to users who have been assigned today.

3. To exit this screen click the Close button. This will take you to the Impact Analysis - Master View.

4. Click the Close button again to enter the SU Impact Analysis Master screen.

6.2.9 Viewing any Prerequisites prior to Installing a Software Update

Complete this task to view the prerequisites before you update the software.

1. Within the SU Impact Analysis Master screen select the Pre-reqs View exit row.

   The Pre-reqs View displays any prerequisites that may be required to apply a software update. These requirements may include:

   - Base line software updates that are required prior to installing the current software update.

   - Indicates any quarterly updates that already have the dependent / baseline software update.

   - Through the Install Status column, it will indicate if an update has been installed.

2. To exit this item, click the Close button to re-enter the SU Impact Analysis Master screen.

6.2.10 Viewing Objects Affected by the Software Update

Select the Object View row to display this screen.

Select one of these radio buttons to filter objects:

Objects that will be affected by applying this software update (Default)
Lists all affected objects delivered by the software update.

All objects delivered with this software update
Lists all objects in the software update.

6.2.11 Accepting Assigned Objects

Complete this task to accept the assigned objects.

1. In the object window, accept a job by selecting it in the object window.

2. Click the Approved exit row.

    The administrator might modify these text fields:

    - **Impact Analysis Status**

        Through a visual assist, various values may be assigned to indicate the status (for example Accept / Completion).

    - **Percent Complete**

        A percent completed may be assigned to indicate the progress of analyzing the object.

3. Click the OK button to return to the Impact Analysis - Object View Screen.

4. Click the Close button to return to the main screen (SU Impact Analysis Master)

6.2.12 Viewing SARs

Complete this task to view relevant SARs.

1. Click the SAR View row.

    Select one of these options:

    - **New SARs delivered**

        List new SARs available in the software update.

    - **All SARs delivered**

        List all SARs in the software update.

    - **View Objects associated with each SAR**

        Select this check box if you wish to view objects associated with a specific SAR.

    - **Special Instructions exit row**

        List any additional details and special instructions that may be associated with a specific SAR.

2. Click the Close button to return to the Impact Analysis SAR View screen.

- **Approved exit row**

  Same as noted earlier.

3. Click the Close button again to return to the SU Impact Analysis screen.

6.2.13 Viewing Control Files in the Software Update

Complete this task to view the Control Files.

1. To access this option, click the Control File View row.

   The Control File View lists all control files in a software update and will indicate the merge options for individual items.

   Select one of these exit row options:

   - Approved

     Same as indicated earlier.

   - Detail

     What specifically has changed within a control file.

2. Click the close button to return to the SU Impact Analysis Master screen

6.2.14 Working with the Scheduler View

Complete this task to view the scheduled merges and table conversions.

1. Click Scheduler View from the exit row.

   The Scheduler viewer lists merges and table conversions that will be performed when the software update is executed.

2. Click the Close button to return to the SU Impact Analysis Master screen.

6.2.15 Working with the Analyze Report

Click the Analyze Report exit row.

This report is a complete summary, in Adobe Acrobat format, of the impact analysis results.

7

Custom Modifications and Packages

This chapter contains the following topics:

7.1 Understanding Custom Modifications and Packages

At this point, you are ready to retrofit your custom modifications into the objects delivered in the update. You may also choose to apply Oracle's suggested UDC description Data Dictionary glossary changes. This portion of the update process may involve several iterations of retrofitting and testing, so you will also be building update packages to deliver the modifications to the testing environments. This chapter also explains how to build and test the packages that you will deploy to the workstations.

If you made a backup of original specifications and business functions, you can restore this backup.

See Restoring a Backup.

7.2 Retrofitting Custom Modifications

This section provides an overview of retrofitting custom modifications, discusses prerequisites, and discusses how to retrofit custom modifications for:

- Interactive applications
- Reports
- Table conversions
- Tables
- Named event rules
- C business functions

7.2.1 Understanding Retrofitting Custom Modifications

Most users modify their software to make the functionality more applicable to their business situations. When you update to a new release, you need to transfer your modifications to the new release.

Because re-creating custom modifications each time you update the software would be a laborious process, this chapter explains how to integrate the custom modifications that you made in your current software into the updated software. This integration, called retrofitting, enables you to refit the customizations that can be merged into each new version of the software.

7.2.2 Prerequisites

To retrofit modifications, you need a workstation with the upgraded software and the development tools. These tools enable you to compare the customizations that your current software merged into the new software with any path code in the system. This enables you to easily compare the upgraded modifications with a version of your modifications before the upgrade or with the pristine environment of the new release.

This table lists the requirements to retrofit custom modifications.

Requirement	Details
Personnel	A programmer, preferably the same one who did the custom modifications, should perform this task.
Logon status	You must be able to log on to the workstation on which you will retrofit object modifications, typically in the development or prototype environment.
Package	The environment must be updated and a package must be built and deployed to the workstation being used.
Modified Objects	The modified objects must be checked out.
	See *JD Edwards EnterpriseOne Tools Object Management Workbench Guide*.

7.2.3 Retrofitting Custom Modifications for an Interactive Application

To retrofit custom modifications for an interactive application:

1. From Object Management Workbench (OMW), use Form Design Aid (FDA) to copy custom objects into the target application.

   You can use Compare Mode, under the File menu, to help with this process. Everything custom must be copied in FDA, except for Event Rule (ER) variables and ER statements that do not reference any custom objects.

2. Save your changes.

3. Within FDA, select Edit and Event Rules.

   This option enables you to use EditER to reenter all ER statements that reference any custom objects other than custom ER variables.

4. Save your work.

5. Use the JD Edwards ER Compare tool (ER Compare button in OMW or ER Compare command in FDA) to compare the updated local specifications (target) with the original, customized (source) specifications.

6. Copy ER variables and then ER statements from source to target.

   Do not copy any statements that reference objects that existed only in the source (customized) environment. Those should have been created in step 3.

7. Validate the resulting ER. Save and exit JD Edwards ER Compare.

8. When you finish retrofitting and testing the modifications, check them back in and rebuild the package.

9. Test and fix the modifications, and then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

7.2.4 Retrofitting Custom Modifications for a Report

To retrofit custom modifications for a report:

1. From OMW, use Report Design Aid (RDA) to re-create all custom report objects in the target UBE (universal batch engine).

2. Within RDA, select Edit and Event Rules.

   This option enables you to use EditER to reenter all ER statements that reference custom objects other than custom ER variables.

3. Save your work.

4. Use the JD Edwards ER Compare tool (ER Compare button in OMW) to compare the updated local specifications (target) with the original, customized (source) specifications.

5. Copy ER variables and then ER statements from source to target.

   Do not copy any statements that reference objects that existed only in the source (customized) environment. Those should have been created in step 2.

6. Validate the resulting ER. Save and exit JD Edwards ER Compare.

7. When you finish retrofitting and testing the modifications, check them back in and rebuild the package.

8. Test and fix the modifications, and then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

7.2.5 Retrofitting Custom Modifications for a Table Conversion

To retrofit custom modifications for a table conversion (TC):

1. Within OMW, use Table Conversion Design Aid to re-create all custom parts of the target UBE.

2. Within Table Conversion Design Aid, click the Advanced ER button within the Mapping dialog.

   This option enables you to use EditER to reenter all ER statements that reference custom objects other than custom ER variables.

3. Use the JD Edwards ER Compare tool (ER Compare button in OMW) to compare the updated local specifications (target) with the original, customized (source) specifications.

4. Copy ER variables and then ER statements from source to target.

   Do not copy any statements that reference objects that existed only in the source (customized) environment. Those should have been created in step 2.

5. Validate the resulting ER. Save and exit JD Edwards ER Compare.

6. When you finish retrofitting and testing the modifications, check them back in and rebuild the package.

7. Test and fix the modifications, and then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

7.2.6 Retrofitting Custom Modifications for a Table

To retrofit custom modifications for a table:

1. Within OMW, on the Design Tools tab, click the Table Trigger Design Aid button and use EditER to reenter all ER statements that reference custom objects other than custom ER variables.

2. Use the JD Edwards ER Compare tool (ER Compare button in OMW) to compare the updated local specifications (target) with the original, customized (source) specifications.

3. Copy the ER variables and then the ER statements from the source to the target.

Do not copy any statements that reference objects that existed only in the source (customized) environment. Those should have been created in step 1.

4. Validate the resulting ER. Save and exit JD Edwards ER Compare.

5. Use the Table Design Aid tool within OMW to update each table that needs further work.

6. When you finish retrofitting and testing the modifications, check them back in and rebuild the package.

7. Test and fix the modifications, and then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

7.2.7 Retrofitting Custom Modifications for a Named Event Rule

To retrofit custom modifications for a named event rule (NER):

1. Within OMW, use the JD Edwards ER Compare tool to compare the updated local specifications (target) with the original, customized (source) specifications.

2. Copy the ER variables and then the ER statements from the source to the target.

Do not copy any statements that reference objects that exist only in the source (customized) environment.

3. Save and exit JD Edwards ER Compare.

4. Use the Business Function Design Aid tool from OMW to select and update each business function that needs further work.

5. Within the Business Function Design Aid tool, select Form and Edit.

The edit option enables you to use EditER to reenter ER statements that reference custom objects. Save your work.

6. Validate the resulting ER.

7. When you finish retrofitting and testing the modifications, check them back in and rebuild the package.

8. Test and fix the modifications, and then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

7.2.8 Retrofitting Custom Modifications for a C Business Function

To retrofit custom modifications for a C business function:

1. Within OMW, use the JD Edwards ER Compare tool to compare the updated local business function source code (target) with the original, customized (source) code.

2. Select Edit, Auto Merge Application to merge the code. Save and exit JD Edwards ER Compare.

3. Start the Business Function Design Aid tool from OMW.

4. Select Form and Edit to use Microsoft Visual Studio to finish editing the code.

5. Select the Build Business Function button in OMW to build the business function.

6. When you finish retrofitting and testing the modifications, check them back in and rebuild the package.

7. Test and fix the modifications, and then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

7.3 Using JD Edwards Compare and Merge Tools

This section provides an overview of JD Edwards ER Compare and discusses how to:

- Use JD Edwards Visual Compare for UDC Descriptions and Glossary tool.

- Use JD Edwards ER Compare for applications and event rules.

- Work with JD Edwards ER Compare.

   See Also:

   - "Working with JD Edwards EnterpriseOne FDA Compare" in the *JD Edwards EnterpriseOne Tools Development Tools: Form Design Aid Guide*.

7.3.1 Understanding JD Edwards ER Compare

JD Edwards EnterpriseOne provides compare/merge tools to help with the retrofit process for:

- Applications.

- ER.

- UDC Descriptions and the Data Dictionary glossary.

The JD Edwards compare/merge tools enable you to compare two versions of JD Edwards EnterpriseOne objects (APPL, ER, NER, UDC descriptions, DD glossary). For example, if you apply an update containing an application in which you made custom modifications, you will need to retrofit that object. FDA and JD Edwards ER Compare let the developer compare the updated application and NERs to the custom object in the central objects data source of any defined path code, specifications, or Electronic Software Update (ESU) backup.

JD Edwards ER Compare provides a detailed, on-screen comparison of event rules. You can change the target object (your local version) within the utility by moving lines directly from the source. You can also remove or disable lines. In addition to providing an on-screen comparison, you can select to print a report detailing the changes as well.

7.3.2 Using JD Edwards Visual Compare for UDC Descriptions and Glossary Tool

Oracle's JD Edwards EnterpriseOne Visual Compare for UDC Descriptions and Glossary tool (P96472) enables you to review and apply text updates for Data Dictionary glossaries and UDCs. You can see a side-by-side comparison of the new

and old text values, which enables you to choose whether to accept the changes. When you install an ESU containing UDC Description and Glossary changes, an XML file is extracted to the Special Instructions folder on the deployment server and is located in the following directory: ..\E900\SpecialInstructions. The Visual Compare for UDC Descriptions and Glossary Tool, application P96472, is run from an administrative client workstation within JD Edwards EnterpriseOne and applies the changes to the current environment. You must have installed the Planner Update, which contains Software Action Request (SAR) 7481054, completed the special instructions, and built and deployed your package.

To apply DD glossary and UDC description changes:

1. In the Fast Path, enter **P96472.**

2. On Work With Special Instructions, click Add.

   On Search and Select Special Instructions, in the Server Share Path field, the path to the Deployment Server special instructions folder appears as the default.

3. If you have moved the folder or if the appropriate folder does not appear, click the browse button, navigate to the directory that contains the XML file, and select the directory. Click Find.

4. In the grid, click the appropriate ESU, and then click Select.

   The data from the new ESU is imported and the application returns to the Work With Special Instructions form. The new ESUs appear in the grid. The Work With Special Instructions form appears. The ESUs appear in the grid.

5. Select the appropriate ESU.

6. Select one of the following options from the Row menu:

   – Accept: Select this option if you want to accept all updates in the ESU without reviewing them.

   – Reset Status: Select this option to change the status from **Applied** to **Not Applied** or from **Reviewed** to **Not Applied.**

   Three types of statuses are available:

Applied	Applied status appears if you have applied everything contained in the ESU. If you have applied parts of the ESU, but not all, then this status will not appear.
Not Applied	This status appears if you have not applied any of the ESU contents.
Reviewed	This status appears if you have looked at the ESU but not applied any of its contents.

7. Select the UDC Description Option to access the Work with UDC Description Changes form. This option is enabled only if the ESU contains changes to UDC descriptions.

   The UDCs are grouped by product code and appear in a list underneath the Available UDC Items folder. Only those UDCs that have different descriptions from the ones that already reside in your current environment appear.

8. You can select individual UDCs, multiple UDCs, or all UDCs. To select all UDCs, click the top-level node located under the Available UDC Items folder. Clicking any node selects all of the UDCs beneath it. To accept the UDC descriptions, click Accept.

9. You can opt to view all UDCs in the ESU by clicking the All items option. Or, you can opt to view only those items that have not already been reviewed by clicking the Non Reviewed Items option.

10. Click the double-arrow button to accept the UDC description of the currently selected UDC.

11. Select the DD Glossary option to access the Work with DD Glossary Changes form. This option is enabled only if the ESU contains changes to DD glossaries.

    The DD items are grouped by product code and appear in a list underneath the Special Instructions folder. Only those DD items that have different glossaries from the ones that already reside in your current environment appear.

12. You can select individual DD items, multiple DD items, or all DD items. To select all DD items, click the top-level node located under the Special Instructions folder. Clicking any node selects all of the DD items beneath it. To accept the DD glossaries, click Accept.

13. You can opt to view all glossaries in the ESU by clicking the All items option. Or, you can opt to view only those items that have not already been reviewed by clicking the Non Reviewed Items option.

14. Click the double-arrow button to accept the DD glossary of the currently selected DD.

15. Select the Preceding ESU option to view a summary of changes previously applied but also contained in the selected ESU.

16. Select the SARs Related option to view all SARs in the selected ESU containing text changes for UDCs and glossaries.

7.3.3 Using JD Edwards ER Compare for Applications and Event Rules

This section provides an overview of the JD Edwards ER Compare user interface and discusses how to start JD Edwards ER Compare.

7.3.3.1 Understanding the JD Edwards ER Compare User Interface

JD Edwards ER Compare is a utility that enables you to compare an application on the local workstation (target application) to the source applications defined in:

■ The central objects data source of any defined path code.

■ A TAM specifications directory.

■ An ESU backup.

When you start JD Edwards ER Compare, a tree-structured outline of the application appears on the left. You can change source locations with the Select Source command under the File menu.

Expand an event node in the tree to display a split window that shows the source ER on the left and corresponding target ER on the right. The ER on the right belongs to your local specifications.

The program indicates differences in color, while identical lines are normally displayed in black. Disabled lines are marked with an exclamation point. You can customize the color coding by selecting the Set Colors command from the View menu.

JD Edwards ER Compare normally displays ID numbers and technical details about the currently selected item in two small windows on the status bar. The window on the left annotates the source specification while the window on the right annotates the

target specification. This information is superfluous in most cases, and can be deactivated with the Show Object IDs switch under the View menu.

The tool lets you compare a modified application to the original version of that application on the server. JD Edwards ER Compare provides a side-by-side, visual comparison of the event rules for the two applications. Moreover, JD Edwards ER Compare enables you to modify the target ER (your local version) by copying lines directly from the source application. You can also move, remove, and disable ER lines in the target application. To copy all eligible lines in the current event from source to target, use the Copy All command. To copy all eligible lines in every event from source to target, use the Auto Merge Application command in the Edit menu.

To validate your changes before saving, select the Validate Event Rules command from the File menu. A validation will automatically occur before you exit the tool if you have saved changes.

7.3.3.2 Starting JD Edwards ER Compare

JD Edwards ER Compare can be started from FDA or directly from OMW.

When JD Edwards ER Compare starts, a window appears. On this window, entitled Select the Location of Source Specifications, select one of these locations:

- Central Objects Path Code

  Enter the server location of the source object (the object to which you want to compare the local ER).

- Remote Specifications Location

  Enter the TAM location of the source object (the object to which you want to compare the local ER). ESUs are delivered in a TAM package, so use this method to compare the local ER to an object packaged in an ESU.

- Software Update Backup

  After applying a software update, use this tool to retrofit custom ER from the customized copy on the ESU backup.

Note: Starting JD Edwards ER Compare under FDA freezes all other programs running on your system, including FDA itself. Finish your work in JD Edwards ER Compare and then exit ER Compare to restore normal operation. The purpose of this action is to prevent two programs from potentially modifying the same set of specifications at the same time.

7.3.4 Working with JD Edwards ER Compare

Use the application tree view to identify and display specific application and ER components that have changed. If a parent node is identified as having changed, expand it to see which of its children are different. Expand an event in the tree structure to display its associated code. You can display more than one event at a time.

You can change the target ER with JD Edwards ER Compare. You can also print the ER.

7.3.4.1 Changing the Target ER

Perform any of these actions to change the target ER:

Task	Details
To copy selected lines from source to target	Select the lines to copy and then select Copy Right.
To copy all lines in the current event	See Merging ER in a Single Event.
To copy all lines in the application	See Merging ER in the Entire Application.
To delete selected lines from the target	Select the lines to delete, and then click Delete.
To enable or disable selected lines in the target	Select the lines to enable or disable, and then select Enable/Disable ER.
To undo the previous command	Select Undo.
To redo the previous command	Select Redo.
To reload the last saved version of the specifications	Select Refresh.

Each command is available from the Edit menu and tool bar.

> **Note:** Use the Shift key to select multiple, contiguous lines and the Ctrl key to select multiple, noncontiguous lines.

When you are copying ER, JD Edwards ER Compare checks ER variable references before copying and automatically fixes nonmatching variable IDs. Not only does JD Edwards ER Compare perform validity checking on ER variables, which are present in almost every ER statement, but it also does many other types of validity checking.

> **Caution:** Although JD Edwards ER Compare provides validity checking, which eliminates the largest source of invalid ER, you must still be vigilant when using JD Edwards ER Compare. When JD Edwards ER Compare copies ER statements, it does not check all of the object references in those statements. If the ER statements reference objects that do not exist in the target specifications or objects that have different IDs in the source and target specifications, JD Edwards ER Compare may allow the copy operation, which results in invalid ER. Different control IDs are very common for controls or objects that were not in the base version of the application. Controls that were added at separate times to separate versions of the application usually have different control IDs.

When you save changes, your local application specifications are updated. JD Edwards ER Compare prompts you to save before either of these operations:

- Exit

- Select new source location

7.3.4.2 Printing

You can use the Print command to place a copy of the target ER in a text file. JD Edwards ER Compare will generate the text file and open it in your default text editor. You can then print the ER from the text editor.

7.3.4.3 Merging ER in a Single Event

The Copy All command copies ER lines from the source to the target, but only within the currently displayed event. The command will not delete lines from target ER if they do not exist in the source location. The command also does not necessarily copy all lines. It does not copy lines that would produce any of these types of invalid ER:

- Duplicate variables.

- Unbalanced IF and ENDIF statements.

- Unbalanced WHILE and ENDWHILE statements.

- Statements referencing an ER variable that is not defined in the target application.

- Statements referencing an ER variable that is defined differently in the target application.

7.3.4.4 Merging ER in the Entire Application

The Auto Merge Application command resides under the Edit menu. It lets you copy ER lines from all events in the source application to the corresponding events in the target application. It works like the Copy All command, but it works on all events at once. The command will not delete lines from target ER that do not exist in the source location. The command also attempts to avoid copying lines that would result in invalid ER.

As with any JD Edwards ER Compare command, you might create invalid ER by using the Auto Merge Application command. As of version 8.98, JD Edwards ER Compare attempts to protect you from this by disabling unsafe operations. For example, JD Edwards ER Compare prevents the accidental creation of references to undefined ER variables. However, it does not recognize references to other kinds of undefined objects. Follow the steps recommended earlier to ensure that your ER remains valid.

Regardless of how you modify the ER, you should validate event rules prior to saving. This command is found under the File menu. If any ER violations occur, delete the offending lines and use EditER to reenter them after you have exited JD Edwards ER Compare.

7.4 Using JD Edwards EnterpriseOne Package Management

The package management process provides a means to create a package, to define and build a package, and to deploy packages to both servers and workstations using a step-by-step director process.

> **Note:**   The software update process creates the package definition; you simply build and test the package.

Several instances occur in which you will need to update or set up a workstation or server with the JD Edwards EnterpriseOne software. You might need to set up a new workstation, deploy custom solutions to all or to selected users, create a new path code for development, or deploy a fix.

To include any modifications (changed or added business functions or applications) into a package for deployment to workstations (for example, DV900FB or DV900PB), you must define and build one of your own.

See Also:

- "Building Packages" in the *JD Edwards EnterpriseOne Tools Package Management Guide*.

8

Updating Environments

This chapter contains the following topics:

8.1 Understanding How to Update the Production Environment

Before proceeding with these instructions, you should test the new modifications with a copy of production data in the prototype environment.

Update the production environment after you update and test development and prototype environments.

Do not include additional environments when updating the live production environment. The purpose of isolating the update of production is to minimize production downtime.

Oracle's JD Edwards EnterpriseOne Global Support Center maintains several documents that describe how to manage and promote Software Updates. These documents address many details of the update process and complement the current documentation.

To access these documents, log on to My Oracle Support, and click the Knowledge tab. Perform a search for the following documents:

- Best Practice for Managing Software Updates
- Applying and Promoting Software Updates
- Understanding and Managing Planner ESUs

8.2 Updating the Production Environment

This section discusses how to:

- Update the production environment.
- Prepare to use the updated production environment.

8.2.1 Updating the Production Environment Using OMW

You update the production environment (and other environments) using Oracle's JD Edwards EnterpriseOne Object Management Workbench (OMW).

The software update process creates an OMW project for this update. To update the production environment, promote the project in OMW to the appropriate status as

defined by the activity rules. (For example, if you are using Oracle's default JD Edwards EnterpriseOne conventions, you can promote a project from Development to Prototype by changing the status from **21** to **26**. For more information about your organization's activity rules, see your JD Edwards EnterpriseOne administrator.)

> **Note:**   If the software update process runs the table and index creation batch application (R98407 in F9843) and you are using OMW to promote the project to the production environment, you must manually create and regenerate the table and index in OMW.

See "Understanding JD Edwards EnterpriseOne OMW Administration" in the *JD Edwards EnterpriseOne Tools System Administration Guide*.

8.2.2 Preparing to Use the Updated Production Environment

After you update the production environment, you create a new package, deploy the new package to a workstation, and test the modifications there.

This table lists the requirements to use the updated production environment:

Action	Details
Personnel	Installer or system administrator
Logon status	On the enterprise server, logged on as user JDE with the database password for user JDE.
Prerequisites	Run the installation plan for the production environment.
Concurrent Tasks	None

To prepare to use the updated production environment:

1. Create a new package.

    See "Building Packages" in the *JD Edwards EnterpriseOne Tools Package Management Guide*.

2. Deploy the new production package to the workstation.

3. Surface test the updated production environment.

    After you finish testing the environment, you can deploy the package to other workstations.

A
Setting Up Localizations

This appendix contains the following topics:

A.1 Understanding How to Set Up Localizations

To install localizations using Electronic Software Updates (ESUs), the customer should run the Work with Enhancements application and register the localization with the JD Edwards EnterpriseOne Installation system.

When you run the Work with Enhancements application, it registers the localization with the JD Edwards EnterpriseOne Installation system and enables the software to correctly handle all future updates to the localization. When you register an enhancement from an ESU, the software update system will correctly apply the ESU to your system.

R96450 is a UBE that enables and disables localization code. When ESUs are shipped out, all localization objects are disabled in the ESU. The R96450 enables the correct objects based on the enhancement and revision level that you entered in the Work With Enhancements application.

A.2 Adding the Localization

Complete this task to add the localization to the JD Edwards EnterpriseOne environment.

On the deployment server, sign on to the DEP900 environment.

In the fast path, type **P96450**.

> **Note:** In order to run the application, you must install the most recent Planner ESU.

1. On Work with Enhancements, click Add.

2. On the Edit Enhancement Info screen, complete these fields:

   - **Enhancement Type**

Type or select **ARGENTINA**.

- **Revision**

  Type the revision number of the Quarterly Update that you obtained in the previous task.

- **Description**

  Type a valid description.

3. Click OK.

4. Click OK.

5. On the Work with Enhancements form, click Enable to run the R96450 enabler.

Note: Click Disable to disable the enhancement type.

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6. When the UBE completes, open the generated UBE report, and ensure that the report has not recorded any errors. If the report contains errors, forward the report to your GSC representative.

This information is also contained in the jde.log.

7. If the UBE runs successfully without errors, the Localization should be successfully registered. The software will now correctly manage the localization for all subsequent software updates.

Once you have registered the localization, you may take ESUs as normal.

A.3 Changing the Revision Level

Complete this task to update the revision number of the localization.

1. On the Work With Enhancements browse form, select the row for ARGENTINA.

2. Click Select.

3. Type the new revision number in the Revision box and press OK.

The program displays a warning message.

4. Click OK to synchronize the NER to the new enhancement revision level.

The Enabler automatically runs with the specification merge, R98700. For it to run, you must have an enhancement type set up and the software update must have NERs.

A.4 Setting Processing Options for R96450

These values are the default processing options and data selection for the XJDE001 version. You can tell that you are running the XJDE001 version because the P96450 prompts you with the warning that it will run R96450 version XJDE0001.

The default processing options are:

Environment Name
DV900

Enter the name of the environment for which you want to update the NERs.

Enhancement Operation

E

E indicates that the NER for localization will be enabled.

Generate NER

<blank>

A blank value indicates that the NER source will not be regenerated (for example, you will need to build a full package and deploy to get the changes to a client workstation).

Level of Detail

0

A value of 0 indicates that only errors and lines changed will be printed on the report.

Proof or Final

1

A value of 1 indicates that the UBE will update the NER.

A data selection of 70 means that only NER objects belonging to system code 70 (localization) will be affected.

Glossary

Accessor Methods/Assessors

Java methods to "get" and "set" the elements of a value object or other source file.

activity rule

The criteria by which an object progresses from one given point to the next in a flow.

add mode

A condition of a form that enables users to input data.

Advanced Planning Agent (APAg)

A JD Edwards EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of rational databases, flat file format, and other data or message encoding, such as XML.

application server

Software that provides the business logic for an application program in a distributed environment. The servers can be Oracle Application Server (OAS) or WebSphere Application Server (WAS).

Auto Commit Transaction

A database connection through which all database operations are immediately written to the database.

batch processing

A process of transferring records from a third-party system to JD Edwards EnterpriseOne.

In JD Edwards EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than JD Edwards EnterpriseOne to JD Edwards EnterpriseOne Accounts Receivable and JD Edwards EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to JD Edwards EnterpriseOne.

batch server

A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.

batch-of-one

A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks.

best practices

Non-mandatory guidelines that help the developer make better design decisions.

BPEL

Abbreviation for Business Process Execution Language, a standard web services orchestration language, which enables you to assemble discrete services into an end-to-end process flow.

BPEL PM

Abbreviation for Business Process Execution Language Process Manager, a comprehensive infrastructure for creating, deploying, and managing BPEL business processes.

Build Configuration File

Configurable settings in a text file that are used by a build program to generate ANT scripts. ANT is a software tool used for automating build processes. These scripts build published business services.

build engineer

An actor that is responsible for building, mastering, and packaging artifacts. Some build engineers are responsible for building application artifacts, and some are responsible for building foundation artifacts.

Build Program

A WIN32 executable that reads build configuration files and generates an ANT script for building published business services.

business analyst

An actor that determines if and why an EnterpriseOne business service needs to be developed.

business function

A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-JD Edwards EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.

business function event rule

See named event rule (NER).

business service

EnterpriseOne business logic written in Java. A business service is a collection of one or more artifacts. Unless specified otherwise, a business service implies both a published business service and business service.

business service artifacts

Source files, descriptors, and so on that are managed for business service development and are needed for the business service build process.

business service class method

A method that accesses resources provided by the business service framework.

business service configuration files

Configuration files include, but are not limited to, interop.ini, JDBj.ini, and jdelog.properties.

business service cross reference

A key and value data pair used during orchestration. Collectively refers to both the code and the key cross reference in the WSG/XPI based system.

business service cross-reference utilities

Utility services installed in a BPEL/ESB environment that are used to access JD Edwards EnterpriseOne orchestration cross-reference data.

business service development environment

A framework needed by an integration developer to develop and manage business services.

business services development tool

Otherwise known as JDeveloper.

business service EnterpriseOne object

A collection of artifacts managed by EnterpriseOne LCM tools. Named and represented within EnterpriseOne LCM similarly to other EnterpriseOne objects like tables, views, forms, and so on.

business service framework

Parts of the business service foundation that are specifically for supporting business service development.

business service payload

An object that is passed between an enterprise server and a business services server. The business service payload contains the input to the business service when passed to the business services server. The business service payload contains the results from the business service when passed to the Enterprise Server. In the case of notifications, the return business service payload contains the acknowledgement.

business service property

Key value data pairs used to control the behavior or functionality of business services.

Business Service Property Admin Tool

An EnterpriseOne application for developers and administrators to manage business service property records.

business service property business service group

A classification for business service property at the business service level. This is generally a business service name. A business service level contains one or more business service property groups. Each business service property group may contain zero or more business service property records.

business service property key

A unique name that identifies the business service property globally in the system.

business service property utilities

A utility API used in business service development to access EnterpriseOne business service property data.

business service property value

A value for a business service property.

business service repository

A source management system, for example ClearCase, where business service artifacts and build files are stored. Or, a physical directory in network.

business services server

The physical machine where the business services are located. Business services are run on an application server instance.

business services source file or business service class

One type of business service artifact. A text file with the .java file type written to be compiled by a Java compiler.

business service value object template

The structural representation of a business service value object used in a C-business function.

Business Service Value Object Template Utility

A utility used to create a business service value object template from a business service value object.

business services server artifact

The object to be deployed to the business services server.

business view

A means for selecting specific columns from one or more JD Edwards EnterpriseOne application tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.

central objects merge

A process that blends a customer's modifications to the objects in a current release with objects in a new release.

central server

A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical JD Edwards EnterpriseOne installation, the software is loaded on to one machine—the central

server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.

charts

Tables of information in JD Edwards EnterpriseOne that appear on forms in the software.

check-in repository

A repository for developers to check in and check out business service artifacts. There are multiple check-in repositories. Each can be used for a different purpose (for example, development, production, testing, and so on).

checksum

A fixed-size datum computed from an arbitrary block of digital data for the purpose of detecting accidental errors that may have been introduced during its transmission or storage. JD Edwards EnterpriseOne uses the checksum to verify the integrity of packages that have been downloaded by recomputing the checksum of the downloaded package and comparing it with the checksum of the original package. The procedure that yields the checksum from the data is called a checksum function or checksum algorithm. JD Edwards EnterpriseOne uses the MD5 and STA-1 checksum algorithms.

connector

Component-based interoperability model that enables third-party applications and JD Edwards EnterpriseOne to share logic and data. The JD Edwards EnterpriseOne connector architecture includes Java and COM connectors.

Control Table Workbench

An application that, during the Installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.

control tables merge

A process that blends a customer's modifications to the control tables with the data that accompanies a new release.

correlation data

The data used to tie HTTP responses with requests that consist of business service name and method.

credentials

A valid set of JD Edwards EnterpriseOne username/password/environment/role, EnterpriseOne session, or EnterpriseOne token.

cross-reference utility services

Utility services installed in a BPEL/ESB environment that access EnterpriseOne cross-reference data.

database credentials

A valid database username/password.

database server

A server in a local area network that maintains a database and performs searches for client computers.

Data Source Workbench

An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the system-release number data source. It also updates the Data Source Plan detail record to reflect completion.

deployment artifacts

Artifacts that are needed for the deployment process, such as servers, ports, and such.

deployment server

A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.

direct connect

A transaction method in which a client application communicates interactively and directly with a server application.

See also batch-of-one and store-and-forward.

Do Not Translate (DNT)

A type of data source that must exist on the iSeries because of BLOB restrictions.

embedded application server instance

An OC4J instance started by and running wholly within JDeveloper.

edit code

A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.

edit mode

A condition of a form that enables users to change data.

edit rule

A method used for formatting and validating user entries against a predefined rule or set of rules.

Electronic Data Interchange (EDI)

An interoperability model that enables paperless computer-to-computer exchange of business transactions between JD Edwards EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.

embedded event rule

An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.

Employee Work Center

A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages.

enterprise server

A server that contains the database and the logic for JD Edwards EnterpriseOne.

Enterprise Service Bus (ESB)

Middleware infrastructure products or technologies based on web services standards that enable a service-oriented architecture using an event-driven and XML-based messaging framework (the bus).

EnterpriseOne administrator

An actor responsible for the EnterpriseOne administration system.

EnterpriseOne credentials

A user ID, password, environment, and role used to validate a user of EnterpriseOne.

EnterpriseOne development client

Historically called "fat client," a collection of installed EnterpriseOne components required to develop EnterpriseOne artifacts, including the Microsoft Windows client and design tools.

EnterpriseOne extension

A JDeveloper component (plug-in) specific to EnterpriseOne. A JDeveloper wizard

is a specific example of an extension.

EnterpriseOne object

A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects.

EnterpriseOne process

A software process that enables JD Edwards EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. JD Edwards EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.

EnterpriseOne resource

Any EnterpriseOne table, metadata, business function, dictionary information, or other information restricted to authorized users.

Environment Workbench

An application that, during the Installation Workbench process, copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the system-release number data source. It also updates the Environment Plan detail record to reflect completion.

escalation monitor

A batch process that monitors pending requests or activities and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.

event rule

A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.

explicit transaction

Transaction used by a business service developer to explicitly control the type (auto or manual) and the scope of transaction boundaries within a business service.

exposed method or value object

Published business service source files or parts of published business service source files that are part of the published interface. These are part of the contract with the customer.

fast path

A command prompt that enables the user to move quickly among menus and applications by using specific commands.

file server

A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network users request files and make changes to these files.

final mode

The report processing mode of a processing mode of a program that updates or creates data records.

foundation

A framework that must be accessible for execution of business services at runtime. This includes, but is not limited to, the Java Connector and JDBj.

FTP server

A server that responds to requests for files via file transfer protocol.

HTTP Adapter

A generic set of services that are used to do the basic HTTP operations, such as GET, POST, PUT, DELETE, TRACE, HEAD, and OPTIONS with the provided URL.

instantiate

A Java term meaning "to create." When a class is instantiated, a new instance

is created.

integration developer

The user of the system who develops, runs, and debugs the EnterpriseOne business services. The integration developer uses the EnterpriseOne business services to develop these components.

integration point (IP)

The business logic in previous implementations of EnterpriseOne that exposes a document level interface. This type of logic used to be called XBPs. In EnterpriseOne 8.11, IPs are implemented in Web Services Gateway powered by webMethods.

integration server

A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.

integrity test

A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.

interface table

See Z table.

internal method or value object

Business service source files or parts of business service source files that are not part of the published interface. These could be private or protected methods. These could be value objects not used in published methods.

interoperability model

A method for third-party systems to connect to or access JD Edwards EnterpriseOne.

in-your-face error

In JD Edwards EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.

jargon

An alternative data dictionary item description that JD Edwards EnterpriseOne appears based on the product code of the current object.

Java application server

A component-based server that resides in the middle-tier of a server-centric architecture. This server provides middleware services for security and state maintenance, along with data access and persistence.

JDBNET

A database driver that enables heterogeneous servers to access each other's data.

JDEBASE Database Middleware

A JD Edwards EnterpriseOne proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.

JDECallObject

An API used by business functions to invoke other business functions.

jde.ini

A JD Edwards EnterpriseOne file (or member for iSeries) that provides the runtime settings required for JD Edwards EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running JD Edwards EnterpriseOne. This includes workstations and servers.

JDEIPC

Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

jde.log

The main diagnostic log file of JD Edwards EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of JD Edwards EnterpriseOne.

JDENET

A JD Edwards EnterpriseOne proprietary communications middleware package. This package is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all JD Edwards EnterpriseOne supported platforms.

JDeveloper Project

An artifact that JDeveloper uses to categorize and compile source files.

JDeveloper Workspace

An artifact that JDeveloper uses to organize project files. It contains one or more project files.

JMS Queue

A Java Messaging service queue used for point-to-point messaging.

listener service

A listener that listens for XML messages over HTTP.

local repository

A developer's local development environment that is used to store business service artifacts.

Location Workbench

An application that, during the Installation Workbench process, copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the system data source.

logic server

A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when JD Edwards EnterpriseOne software runs.

MailMerge Workbench

An application that merges Microsoft Word 6.0 (or higher) word-processing documents with JD Edwards EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.

Manual Commit transaction

A database connection where all database operations delay writing to the database until a call to commit is made.

master business function (MBF)

An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.

master table

See published table.

media storage object

Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.

message center

A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user.

messaging adapter

An interoperability model that enables third-party systems to connect to JD Edwards EnterpriseOne to exchange information through the use of messaging queues.

messaging server

A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.

Monitoring Application

An EnterpriseOne tool provided for an administrator to get statistical information for various EnterpriseOne servers, reset statistics, and set notifications.

named event rule (NER)

Encapsulated, reusable business logic created using event rules, rather that C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.

Object Configuration Manager (OCM)

In JD Edwards EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.

Object Librarian

A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-incapabilities for developers, and it controls the creation, modification, and use of JD Edwards EnterpriseOne objects. Object Librarian supports multiple environments (such as

production and development) and enables objects to be easily moved from one environment to another.

Object Librarian merge

A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.

Open Data Access (ODA)

An interoperability model that enables you to use SQL statements to extract JD Edwards EnterpriseOne data for summarization and report generation.

Output Stream Access (OSA)

An interoperability model that enables you to set up an interface for JD Edwards EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.

package

JD Edwards EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the installation program can find them. It is point-in-time snapshot of the central objects on the deployment server.

package build

A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in JD Edwards EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build.

Consider the following context: "Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions." The process of creating a package build is often referred to, as it is in this example, simply as "a package build."

package location

The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.

Package Workbench

An application that, during the Installation Workbench process, transfers the package information tables from the Planner data source to the system-release number data source. It also updates the Package Plan detail record to reflect completion.

Pathcode Directory

The specific portion of the file system on the EnterpriseOne development client where EnterpriseOne development artifacts are stored.

patterns

General repeatable solutions to a commonly occurring problem in software design. For business service development, the focus is on the object relationships and interactions.

For orchestrations, the focus is on the integration patterns (for example, synchronous and asynchronous request/response, publish, notify, and receive/reply).

print server

The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.

pristine environment

A JD Edwards EnterpriseOne environment used to test unaltered objects with JD Edwards EnterpriseOne demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

processing option

A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.

production environment

A JD Edwards EnterpriseOne environment in which users operate EnterpriseOne software.

Production Published Business Services Web Service

Published business services web service deployed to a production application server.

program temporary fix (PTF)

A representation of changes to JD Edwards EnterpriseOne software that your organization receives on magnetic tapes or disks.

project

In JD Edwards EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.

promotion path

The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):

11>21>26>28>38>01

In this path, 11 equals new project pending review, 21 equals programming, 26 equals QA test/review, 28 equals QA test/review complete, 38 equals in production, 01 equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.

proxy server

A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.

published business service

EnterpriseOne service level logic and interface. A classification of a published business service indicating the intention to be exposed to external (non-EnterpriseOne) systems.

published business service identification information

Information about a published business service used to determine relevant authorization records. Published business services + method name, published business services, or *ALL.

published business service web service

Published business services components packaged as J2EE Web Service (namely, a J2EE EAR file that contains business service classes, business service foundation, configuration files, and web service artifacts).

published table

Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

publisher

The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

QBE

An abbreviation for query by example. In JD Edwards EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.

real-time event

A message triggered from EnterpriseOne application logic that is intended for external systems to consume.

refresh

A function used to modify JD Edwards EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level.

replication server

A server that is responsible for replicating central objects to client machines.

rules

Mandatory guidelines that are not enforced by tooling, but must be followed in order to accomplish the desired results and to meet specified standards.

secure by default

A security model that assumes that a user does not have permission to execute an object unless there is a specific record indicating such permissions.

Secure Socket Layer (SSL)

A security protocol that provides communication privacy. SSL enables client and server applications to communicate in a way that is designed to prevent eavesdropping, tampering, and message forgery.

selection

Found on JD Edwards EnterpriseOne menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.

serialize

The process of converting an object or data into a format for storage or transmission across a network connection link with the ability to reconstruct the original data or objects when needed.

Server Workbench

An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the system-release number data source. The application also updates the Server Plan detail record to reflect completion.

SOA

Abbreviation for Service Oriented Architecture.

softcoding

A coding technique that enables an administrator to manipulate site-specific variables that affect the execution of a given process.

source repository

A repository for HTTP adapter and listener service development environment artifacts.

Specification merge

A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.

specification

A complete description of a JD Edwards EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.

Specification Table Merge Workbench

An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.

SSL Certificate

A special message signed by a certificate authority that contains the name of a user and that user's public key in such a way that anyone can "verify" that the message was signed by no one other than the certification authority and thereby develop trust in the user's public key.

store-and-forward

The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.

subscriber table

Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.

super class

An inheritance concept of the Java language where a class is an instance of something, but is also more specific. "Tree" might be the super class of "Oak" and "Elm," for example.

table access management (TAM)

The JD Edwards EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.

Table Conversion Workbench

An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.

table conversion

An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.

table event rules

Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although JD Edwards EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.

terminal server

A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

transaction processing (TP) monitor

A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and may include programs that validate data and format terminal screens.

transaction processing method

A method related to the management of a manual commit transaction boundary (for example, start, commit, rollback, and cancel).

transaction set

An electronic business transaction (electronic data interchange standard document) made up of segments.

trigger

One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.

triggering event

A specific workflow event that requires special action or has defined consequences or resulting actions.

user identification information

User ID, role, or *public.

User Overrides merge

Adds new user override records into a customer's user override table.

value object

A specific type of source file that holds input or output data, much like a data structure passes data. Value objects can be exposed (used in a published business service) or internal, and input or output. They are comprised of simple and complex elements and accessories to those elements.

versioning a published business service

Adding additional functionality/interfaces to the published business services without modifying the existing functionality/interfaces.

Versions List merge

The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.

visual assist

Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.

vocabulary override

An alternate description for a data dictionary item that appears on a specific JD Edwards EnterpriseOne form or report.

web application server

A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.

web server

A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.

Web Service Description Language (WSDL)

An XML format for describing network services.

Web Service Inspection Language (WSIL)

An XML format for assisting in the inspection of a site for available services and a set of rules for how inspection-related information should be made.

web service softcoding record

An XML document that contains values that are used to configure a web service proxy. This document identifies the endpoint and conditionally includes security information.

web service softcoding template

An XML document that provides the structure for a soft coded record.

Where clause

The portion of a database operation that specifies which records the database operation will affect.

Windows terminal server

A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

wizard

A type of JDeveloper extension used to walk the user through a series of steps.

workbench

A program that enables users to access a group of related programs from a single entry point. Typically, the programs that you access from a workbench are used to complete a large business process. For example, you use the JD Edwards EnterpriseOne Payroll Cycle Workbench (P07210) to access all of the programs that the system uses to process payroll, print payments, create payroll reports, create journal entries, and update payroll history. Examples of JD Edwards EnterpriseOne workbenches include Service Management Workbench (P90CD020), Line Scheduling Workbench (P3153), Planning Workbench (P13700), Auditor's Workbench (P09E115), and Payroll Cycle Workbench.

workflow

The automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.

workgroup server

A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.

XAPI events

A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and then calls third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when the specified transactions occur to return a response.

XML CallObject

An interoperability capability that enables you to call business functions.

XML Dispatch

An interoperability capability that provides a single point of entry for all XML documents coming into JD Edwards EnterpriseOne for responses.

XML List

An interoperability capability that enables you to request and receive JD Edwards EnterpriseOne database information in chunks.

XML Service

An interoperability capability that enables you to request events from one JD Edwards EnterpriseOne system and receive a response from another JD Edwards EnterpriseOne system.

XML Transaction

An interoperability capability that enables you to use a predefined transaction type to send information to or request information from JD Edwards EnterpriseOne. XML transaction uses interface table functionality.

XML Transaction Service (XTS)

Transforms an XML document that is not in the JD Edwards EnterpriseOne format into an XML document that can be processed by JD Edwards EnterpriseOne. XTS then transforms the response back to the request originator XML format.

Z event

A service that uses interface table functionality to capture JD Edwards EnterpriseOne transactions and provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested to be notified when certain transactions occur.

Z table

A working table where non-JD Edwards EnterpriseOne information can be stored and then processed into JD Edwards EnterpriseOne. Z tables also can be used to retrieve JD Edwards EnterpriseOne data. Z tables are also known as interface tables.

Z transaction

Third-party data that is properly formatted in interface tables for updating to the JD Edwards EnterpriseOne database.

Index