

# **UPGRADE REFERENCE GUIDE**

*Release A7.3*

J.D. Edwards World Source Company  
One Technology Way  
Denver, CO 80237

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**This publication was revised on 11/17/97**



**IMPORTANT: You must be on Version 3, Release 1, Modification 0 (V3R1M0), or IBM's current general availability level, of the AS/400 operating system to install this upgrade software.**

## TECHNICAL ASSISTANCE

Call the appropriate phone number in the chart below if you have problems installing this software during regular business hours.

LOCATION	PHONE NUMBER	HOURS (Monday through Friday)
The Americas	From the U.S. or Canada, call the 800 toll-free number J.D. Edwards gave to you if you subscribe to the J.D. Edwards annual maintenance program (customer support and software updates).  If you do not subscribe, or if you are outside the U.S. or Canada, call (303) 334-4000 and ask for J.D. Edwards Worldwide Customer Support.	6:00 a.m. to 6:00 p.m., Mountain Time
Europe, Middle East, and Africa	Call 44-1494-682682.	8:00 a.m. to 6:00 p.m., Greenwich Mean Time
Asia Pacific	Call 65-229-1656.	8:00 a.m. to 6:00 p.m., Singapore Time

## AFTER HOURS TECHNICAL ASSISTANCE

If you have emergency problems installing your software during hours other than those shown in the chart above, you can use our 24-hour customer support (same phone number as above) if:

- You have purchased the two-day blocks of 48-hour customer support, or
- You have contracted and paid for PREMIER maintenance services.

## TRAINING CONSIDERATIONS

The updates described in this publication could affect how your staff uses J.D. Edwards software. Please make arrangements to train your staff concerning these updates.



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# Introduction

This publication is written for those who install various upgrades of J.D. Edwards software, including:

- Reinstallations of full releases
- Cumulative PTFs
- Unscheduled PTFs
- Untested quick fixes

*Upgrade Process Overview* in this publication defines these upgrade types.

This publication does not give you step-by-step instructions about how to upgrade your software, which the upgrade workbooks do. Instead, it presents upgrade information topically, introducing topics not covered in the workbooks and expanding on others. J.D. Edwards suggests you begin with the appropriate workbook.

## Publication Conventions

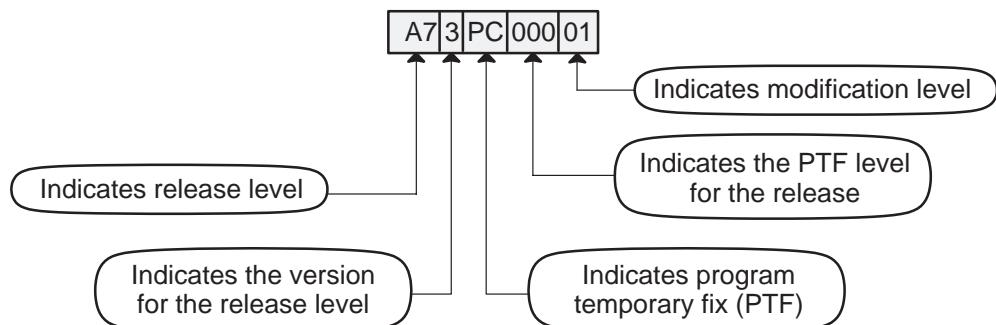
In this publication, *enter* means type the required information and press the Enter key, *type* means type the required information without pressing the Enter key, and *select* means type the number that appears next to a menu selection and press the Enter key.

## Upgrade Naming Conventions

The following sections describe the naming conventions for the various upgrade libraries.

### Cumulative PTFs

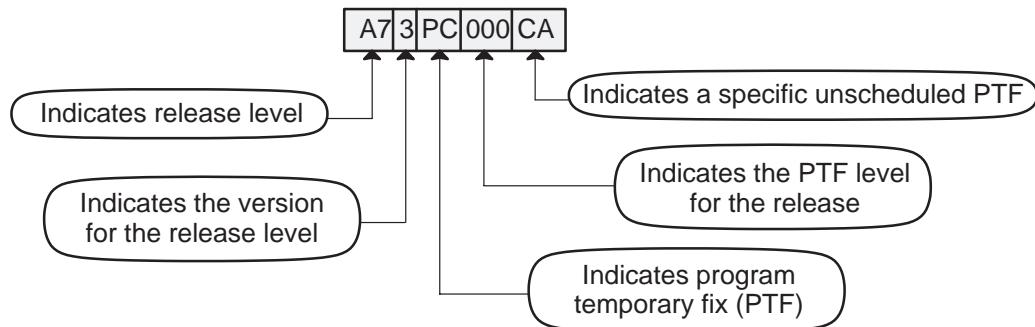
As corrections are made to J.D. Edwards software products, they are added to a cumulative PTF library. On a periodic basis, J.D. Edwards assigns this library a modification level number. The current PTF library is then sent with each software release until the software release is updated with the PTF. At any point in the future, upon request, J.D. Edwards can send you the most recent PTF library upon request. The naming convention for scheduled PTFs is A##PCxxxxyy:



The first two characters represent the software release. The third character is the version, followed by *PC*. The three characters that follow *PC* represent the periodic PTF level number. The last two characters differentiate a specific cumulative PTF from others. After the library is installed, the current software release version and PTF level appear in the bottom right of the menu whenever you access Hidden Selection 25 from any menu.

### Unscheduled PTFs (Ship Boxes)

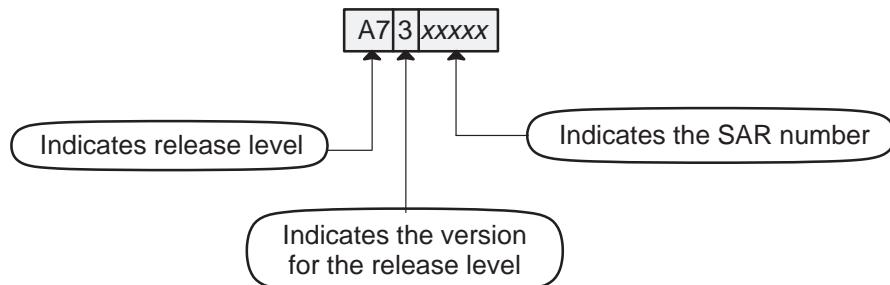
The naming convention for unscheduled PTFs is A##PCxxxxyy:



The first two characters represent the software release. The third character is the version, followed by *PC*. The three characters that follow *PC* represent the periodic PTF level number. The last two characters differentiate a specific unscheduled PTF from others. All unscheduled PTFs are predicated on an existing periodic PTF level.

## Untested Quick Fixes

In addition to the cumulative and unscheduled PTFs, there are program corrections that require immediate attention. These individual program corrections are delivered as untested quick fixes. The naming convention for untested quick fixes is A##xxxxx:



The first two characters represent the software release. The remaining characters represent the Software Action Request (SAR) number associated with this fix.



# Upgrade Process Overview

This chapter gives you a general understanding of the process involved with keeping your J.D. Edwards software updated. It includes descriptions of the various upgrades J.D. Edwards distributes, information about the flow of the upgrade process, and a list of the documentation available to help you upgrade your software.

## General Concepts

Once or twice a year, J.D. Edwards upgrades its software to advance with new AS/400 technology, database changes, or program improvements. J.D. Edwards sent you the upgrade on the magnetic medium you selected. The upgrade you received contains either:

- A complete replacement of your software if you requested a full release, or
- A partial replacement of your software if you requested a program temporary fix (PTF)

The following sections describe the various updates J.D. Edwards distributes.

### Full Release

This upgrade contains major enhancements and database changes developed since the last full release of the software. In addition, it includes upgrade information contained in scheduled PTFs issued since the previous full release. J.D. Edwards distributes full releases when a large number of updates have accumulated and major database changes are needed. J.D. Edwards tries to maximize the time between full releases and rely as much as possible on unscheduled and cumulative PTFs. Full releases, which are shipped about every 12 to 18 months, require a complete and total replacement of the software.

### Cumulative PTF

This upgrade contains corrections developed since the last cumulative PTF or full release of the software. For example, cumulative PTF A73PC00001 updates release level A7.3.

### Unscheduled PTF (Ship Box)

This upgrade is a sort of “mini-PTF” and occasionally is referred to as a “ship box.” The unscheduled PTF represents a product or a family of products, such as Distribution or Financials.

Unscheduled PTFs are tested and sometimes cumulative. In general, as J.D. Edwards makes enhancements to a product, these changes accumulate until released in an unscheduled PTF. Subsequent full releases overlay the contents of the unscheduled PTF.

### Untested Quick Fix (Interim PTF)

This upgrade provides an immediate and temporary solution to a client's emergency situation. Because of its uncontrolled nature, the quick fix often is untested. The untested quick fix was formerly referred to as the "Interim PTF."

## Reinstallation Process Flow

During the reinstallation process, you upgrade an alternate environment, which you create, and then you upgrade your production environment by using the upgraded alternate environment. Upgrading the alternate environment has six major steps, and upgrading the production environment has five.

### Alternate Environment

#### *Step 1*

- Load the upgrade planner (JDFINS) and upgrade software (JDEINSTAL) libraries

#### *Step 2*

- Create an alternate environment
- Set up upgrade plans for the alternate environments by using the upgrade planner
- Validate the upgrade plans

#### *Step 3*

- Load program objects, test data, and source code to alternate libraries

#### *Step 4*

- Convert and merge control files
- Convert application control files
- Convert BIG and LTL (little) files listed in the file scheduler
- Convert "other" files
- Rebuild data dictionary/vocabulary overrides/DREAM Writer
- Rebuild the field reference files and the J.D. Edwards message file
- Build the join logical files

### Step 5

- Update menus by using the Menu Merge Exceptions report
- Update data dictionary items by using the Data Dictionary Merge Report
- Update user defined codes by using the User Defined Code Merge report
- Update the automatic accounting instructions by using the New Automatic Accounting Instructions (AAI) report
- Perform application specific instructions (ASIs)
- Review DREAM Writer versions by using the DREAM Writer Review Workbench
- Create new files
- Rebuild menu word search
- Run special jobs for specific product groups
- Perform the optional and cleanup procedures

### Step 6

- Test J.D. Edwards A7.3 software and applications in the alternate libraries

## Production Environment

### Step 1

- Set up upgrade plans for the production environments by using the upgrade planner
- Validate the upgrade plans

### Step 2

- Set up work files

### Step 3

- Convert and merge control files
- Convert application control files
- Convert BIG and LTL (little) files listed in the file scheduler
- Convert “other” files
- Rebuild data dictionary/vocabulary overrides/DREAM Writer
- Rebuild the field reference files and the J.D. Edwards message file

## **Upgrade Process Overview**

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### *Step 4*

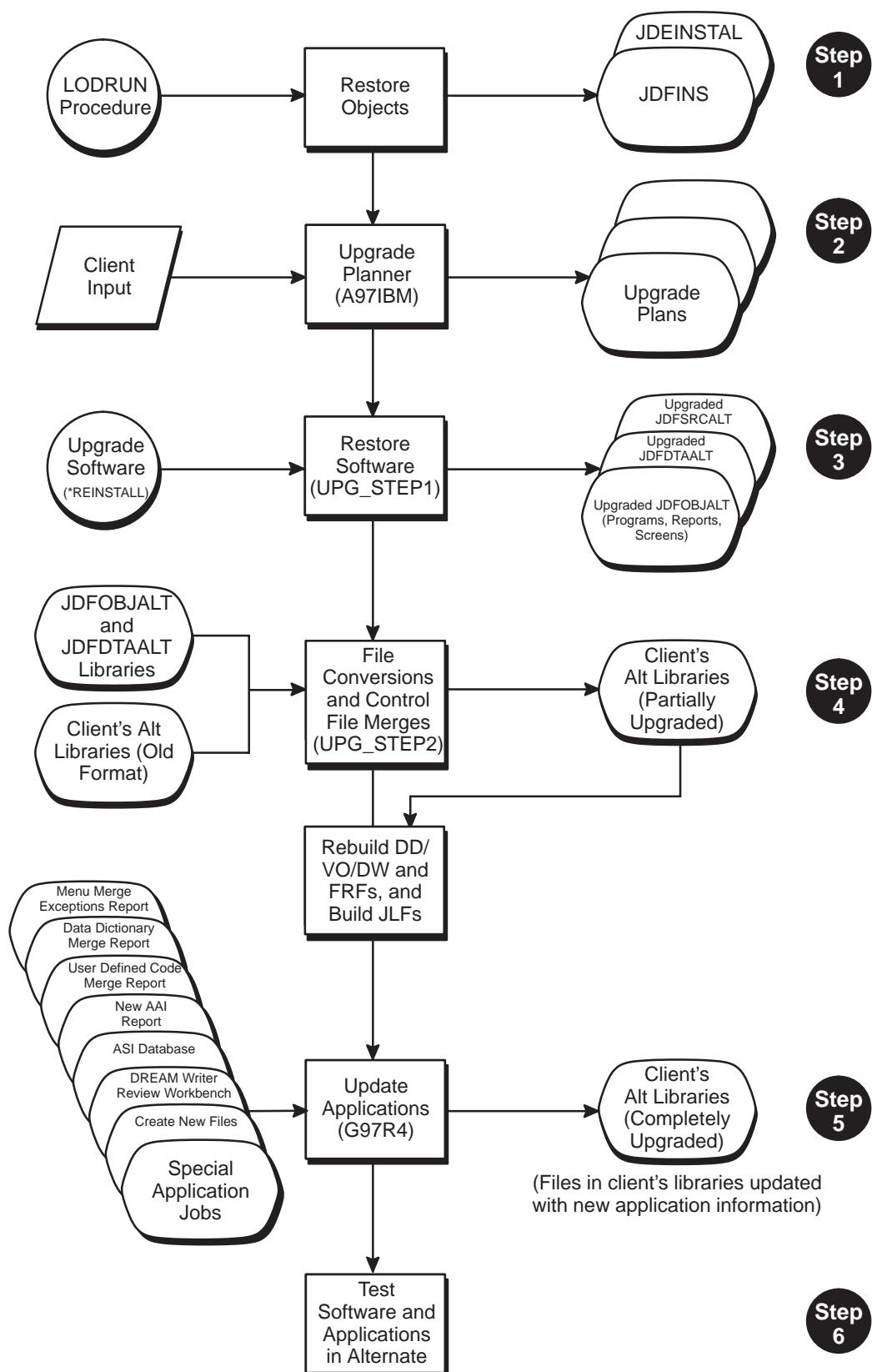
- Copy selected control files
- Perform minimal application specific instructions (ASIs)
- Review DREAM Writer versions by using the DREAM Writer Review Workbench
- Create new files
- Rebuild menu word search
- Run special jobs for specific product groups

### *Step 5*

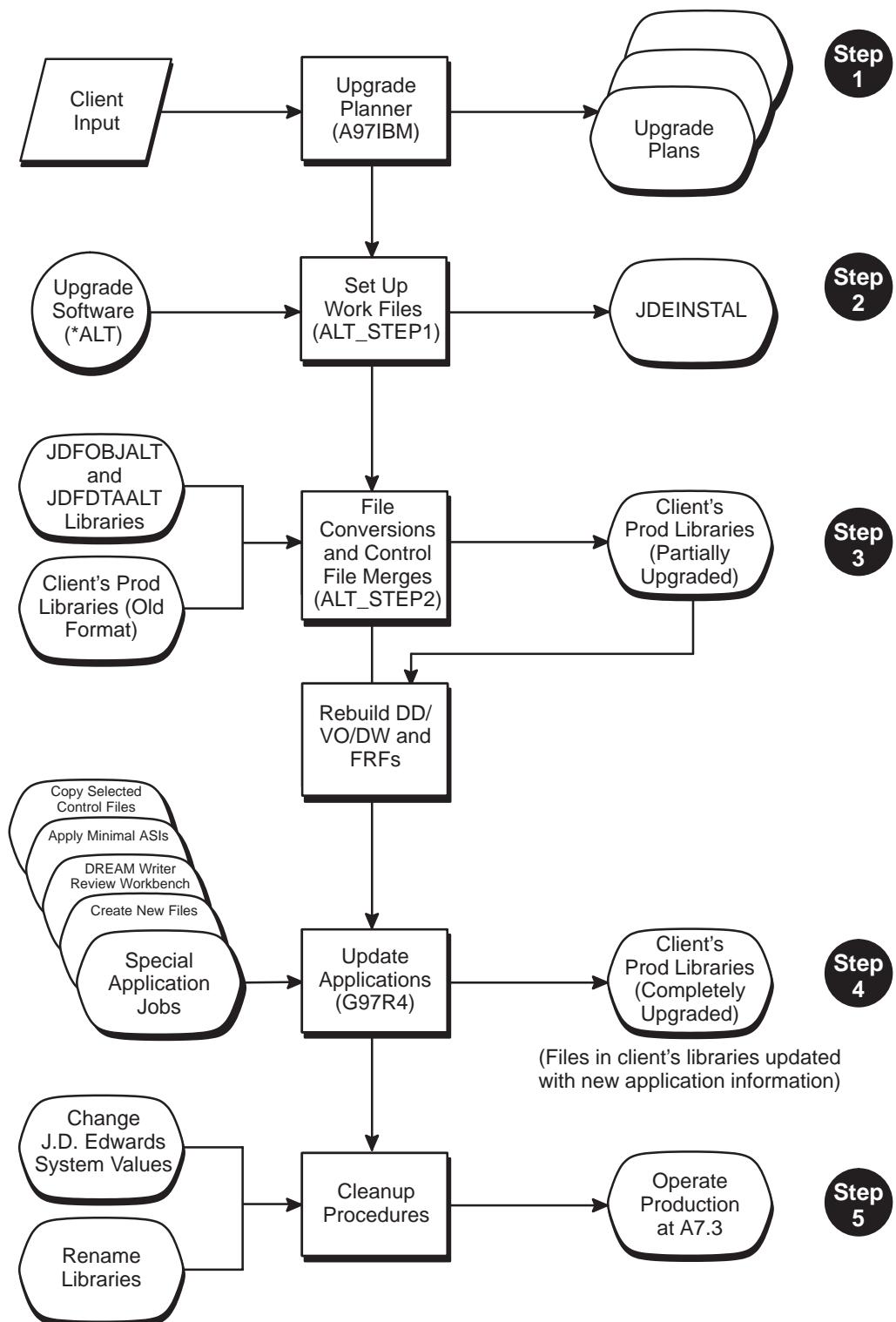
- Change J.D. Edwards system values
- Rename libraries (alternate to production)

The following diagrams illustrate the flow of the reinstallation process for the alternate and production environments. The previous steps are identified in the diagrams.

## Reinstallation Process Flow (Alternate)



## Reinstallation Process Flow (Production)



## Documentation

J.D. Edwards provides you with several publications to help you through the installation or upgrade process.

### Release Notes

*Release Notes* describes enhancements for a new release of J.D. Edwards software. Because it is written for upper management, *Release Notes* is high level, “big picture,” and conceptual in approach. It organizes enhancement information according to product groups. J.D. Edwards publishes *Release Notes* a few months before a new software release is available. To receive *Release Notes*, contact your J.D. Edwards upgrade coordinator.

### “Read Me First” Letter

The *Read Me First* letter contains information you need before you install or upgrade your software, such as IBM system requirements, and various notes on important software and documentation issues not mentioned in the other publications. You should read this letter before you read any other installation or upgrade publication.

### Workbooks

The upgrade workbooks contain instructions about how to install or upgrade the software. The easy-to-use checklists in the workbooks guide you through the installation or upgrade process in a step-by-step manner. Separate workbooks are available for the installation, reinstallation, and PTF installation processes.

### Software Reinstallation Quick Reference Guide

The *Software Reinstallation Quick Reference Guide* is provided for clients reinstalling to A7.3. It provides you with quick procedural notes and some screens, but you should not depend on it to complete the upgrade process.

### Upgrade Reference Guide

The *Upgrade Reference Guide* contains information about topics such as installing new J.D. Edwards systems, merges, control files, and file conversions, as well as detailed procedures and other considerations not covered in the workbooks. You should view the reference guide as a companion to the workbook. However, most of you will find the workbooks complete enough to install or upgrade your software successfully.

### Language Upgrade Guide

The *Language Upgrade Guide* describes how to install and maintain one or more languages in one database or environment. It explains how to set up a language as a base or alternate language.



# Merges and Control Files (Reinstallations Only)

This chapter explains control files, which define the basic structure of J.D. Edwards software, and describes the merges that update them. The information in this chapter applies to reinstallations only.

## Control Files

J.D. Edwards software consists of control files that make up its basic structure. These files organize and sequence the information that you put into the J.D. Edwards system. In addition, the files determine the types of operations to be performed on the input data. For example, the Data Dictionary files (F9200, F9201, F9202, F9203, F9204, F9205, F9816, and F98163) define all specifications for any data item in J.D. Edwards software. Control files differ from transaction files in the following ways:

- Control files contain data that is shared between J.D. Edwards and you, but transaction files contain unique data provided by you only.
- Transaction files can be converted but will never have J.D. Edwards data merged into them.

Many of the control files can be modified by you. For instance, you can change a menu to better suit your business needs. Because you can modify the control files, J.D. Edwards does not automatically modify the customized items with J.D. Edwards data when you perform a reinstallation. The upgrade process for the control files has two general steps:

- Merges – When you run the merges, they automatically add new items to the control files or change certain aspects of the files that are not affected by customization.
- Application Specific Instructions (ASIs) – The ASIs explain how to update those aspects of the files that could contain customized data. For more information about ASIs, see *Application Specific Instructions* in this publication.

This two-step upgrade process protects your tailored information from being overlaid by J.D. Edwards information.

### **Merge Process Overview**

The main upgrade job merges the control files in the J.D. Edwards data library into your existing control files, which are in your common library or production data libraries. After the control file merges complete, your vocabulary overrides must be updated with row and column description text that is stored in the data dictionary. The upgrade process does this automatically by submitting the Rebuild DD/VO/DW job. In addition, you may need to apply application specific instructions (ASIs) to finish updating your control files. For information about ASIs, see *Application Specific Instructions* in this publication.

The upgrade process submits the merges automatically. If you must submit an individual merge from the Merges menu (G97R41), see *Run Individual Merges* in this chapter.

### **Proof and Final Modes**

You can run the merges in two ways:

- Proof Mode – Creates merge reports but does not update control files. By using this mode, you can examine the changes that are reported without updating your files.
- Final Mode – Creates merge reports and updates certain aspects of items in the control files.

You specify the modes in which the merges should run on the Merge Information screen in the upgrade planner. For information about setting the modes, see the *Reinstall Workbook*.

### **Merge Sequence**

The merges are submitted automatically during the upgrade process. Merges are not submitted for new J.D. Edwards installations. The merges and updates that are submitted automatically include:

Software Version Repository (J97885)  
Data Dictionary (J97882)  
DREAM Writer (J97886)  
Vocabulary Overrides (J97884)  
User Defined Codes (J97880)  
Generic Text Application Keys (J97888)  
Menus (J97883A)  
Help Instructions (J97887)  
Generic Message/Rates (J97881)  
Data Dictionary/Vocabulary Overrides Text (J97889)  
Automatic Accounting Instructions (J98727)  
Next Numbers (J98728)

NOTE: If you must submit any or all of the above merges manually, you should do so in the order in which they appear above. Some merges require other merges to be run first. For information about how to submit a specific merge and for a list of dependencies, see *Run Individual Merges* in this chapter. For an explanation about what each merge does, see the appropriate merge section in this chapter.

## Software Versions Repository Merge

The Software Versions Repository files (F9801 and F9802) serve together as a master directory of information for all programs, files, screens, reports, and so forth, that exist in your J.D. Edwards software.

The Software Versions Repository merge updates the software versions repository members in your production data library with current member information in the JDFDATA library.

The Software Versions Repository merge:

- Adds new records to the Software Versions Repository Master file (F9801) and the Software Versions Repository Detail file (F9802)
- Prints a report that lists updated members in the software versions repository
- Updates the following fields in existing members:
  - Member ID
  - Description
  - Function Code
  - Install System
  - Reporting System
  - Base Member Name
  - File Prefix
  - Maint/RSTDSP
  - Omit Option
  - Generation Sev (Severity)
  - Copy Data (Y/N)
  - Optional File
  - Common File

If your system has a J.D. Edwards source library, the merge adds records from the Software Versions Repository Detail file (F9802) in the JDFDATA library to your production data library. In addition, the merge updates the following fields in detail records.

- Source Library
- Object Library

## **Merges and Control Files (Reinstallations Only)**

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- Source File
- SAR Number
- Version ID

NOTE: This merge must complete successfully before you run any other merge.

## **Software Versions Repository Merge Report**

The Software Versions Repository Merge Report (R98726A) lists the members in your production data library that are affected by the merge. For each member, the report shows field values as they are before and after the merge. An example of the report appears below.

98726A		J.D. Edwards & Company SVR Merge Report						Page No. . . . 1	
TO Library (Old info.) = COMMON								Date - . . . . 2/05/96	
FROM Library (New info.) = JDFDATA									
<hr/>									
Member ID	Member Description	Inst Sys.	Rpt. Sys.	FN CD	Base Member	Copy Data	Optional File	Common File	Common File
ASSET	Old Info: New Info:		83 12						
CONVERT	Old Info: Software Installation - Conver New Info: Software Installation - Conver	97 88	97 88	J99600 J97612		N	N	N	
C00RSC	Old Info: New Info:	00 98	00 98						
C00SC	Old Info: New Info:	00 98	00 98						
C0000	Old Info: New Info:	94 98	94 98			N	N	N	
C0010	Old Info: New Info:	00 98	00 98						
C0015	Old Info: New Info:	00 98	00 98			N	N		
C00151	Old Info: New Info:	00 98	00 98			N	N		
C00161	Old Info: New Info:	00 98	00 98			N	N	N	
C00161OLD	Old Info: New Info:	00 98	00 98			N	N	N	
C0030	Old Info: New Info:	98 00	98 00			N	N	N	
C0036	Old Info: New Info:	00 98	00 98			N	N	N	
C0040N	Old Info: New Info:	98 88	98 88			N	N	N	
C0080	Old Info: New Info:	00 98	00 98						

## Data Dictionary Merge

The Data Dictionary files (F9200, F9201, F9202, F9203, F9204, F9205, F9816, and F98163) serve as the central definition point of all specifications for any data item in J.D. Edwards software. Data items include fields, menu messages, error messages, and help text.

The Data Dictionary merge updates the items in your production data library with current data dictionary information in the JDFDATA library. In final mode, the merge adds new data items and updates certain fields in your existing data items. It does not update fields in your data items that contain information you defined for your own specific purposes.

The Data Dictionary merge:

- Adds new data items

NOTE: If a new data item has a classification (Data Item Class), the merge defaults the display decimals of the data item classification into the new data item. Review these data item classifications before you run the merge.

- Updates the following fields in existing data items:
  - Alias Name
  - Alias Type
  - Alpha Description
  - Data File Decimals
  - Data Item Class
  - Size
  - Type
  - Glossary Group
  - Help Program
  - Install System Code
  - Item Occurrences
  - Item Parent
  - Next Number Index
  - Next Number System
  - Release Last Changed
  - Reporting System Code
  - Glossary – if requested (does all or none based on your decision)

## **Merges and Control Files (Reinstallations Only)**

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The Data Dictionary Merge updates the following fields for items that you have not customized. If you have customized any of these fields for an item, the merge does not update the item, but lists these items and the fields you should update on the Data Dictionary Merge Report – Manual Changes (R98722). To make the updates, refer to *Phase 3 – Update Applications* in the *Reinstall Workbook*.

- Data Display Parameters
- Data Display Rules
- Data Edit Rules
- Default Values
- Edit Rules Specifications
- Justify

The Data Dictionary Merge Report – Replaced Changes (R98722A) lists data items that were automatically replaced by the merge.

NOTE: The merge does not change the Display Decimals, Row Description, and Column Title fields for existing data items. Do not change display decimals for items QTYINV or CURRENCY.

## **Data Dictionary Merge Reports**

The Data Dictionary Merge Report – Manual Changes (R98722) lists the manual updates you must make to data items in your production data library. An example of the report appears below.

		J.D. Edwards & Company		Page	-	1
		Data Dictionary Merge Report		Date	-	2/05/96
		Manual Changes		To Libr:	COMMON	
		From Libr:	JDFDATA		Mode	- Final
Data Item		Description	Field	Your Value	Recommended Change	
#MHO		Effect on GL		Data Edit Rules. . . . . VALUE	VALUE	
				Data Edit Rules Spec 1 . . . . Y N M	Y N M H W	
APPN		Period Number - Acco		Data Edit Rules. . . . .	RANGE	
				Data Edit Rules Spec 1 . . . .	1	
				Data Edit Rules Spec 2 . . . .	14	
ARPN		Period Number - Acco		Data Edit Rules. . . . .	RANGE	
				Data Edit Rules Spec 1 . . . .	1	
				Data Edit Rules Spec 2 . . . .	14	
ATO		Address Type - User		Data Edit Rules. . . . . VALUE	VALUE	
				Data Edit Rules Spec 1 . . . . ' ' *	Y N ' ' U P	
ATOT		ATO Line Type		Data Edit Rules. . . . . VALUE	VALUE	
				Data Edit Rules Spec 1 . . . . I R F V	C P Q R X	
BILL		Billable (Y/N)		Data Edit Rules. . . . . VALUE	VALUE	
				Data Edit Rules Spec 1 . . . . Y N ' '	Y N 1 2 4 ' '	
BKTP		Record Type - Bank T		Data Edit Rules. . . . . VALUE	UDC	
				Data Edit Rules Spec 1 . . . . C V G D	00	
				Data Edit Rules Spec 2 . . . .	BT	
DSPM		Display Mode - Code		Data Edit Rules. . . . . VALUE	VALUE	
				Data Edit Rules Spec 1 . . . . C N ' '	C N M P	

Revised 10/11/96

## Merges and Control Files (Reinstallations Only)

The Data Dictionary Merge Report – Replaced Changes (R98722A) lists the changes that are automatically made to data items in your production data library during the merge. An example of the report appears below.

98722A		J.D. Edwards & Company Data Dictionary Merge Report Replaced Changes			Page - 1	Date - 2/05/96	To Libr: COMMON	From Libr: JDFDATA	Mode - Final
Data Item	Appl Over	Screen Override	Description	Field	Was	Change			
#AIL			Amount - current Ava	Data Item Class. .	CURRENCY				
#AMB			Amount/Percent Incre	System Code. . . .	06	05			
#AMD			Amount/Percent Incre	System Code. . . .	06	05			
#AMH			Amount/Percent Incre	System Code. . . .	06	05			
				Data Item Class. .	CURRENCY				
#AMP			Amount/Percent Incre	System Code. . . .	06	05			
#AMS			Amount/Percent Incre	System Code. . . .	06	05			
#ANP			Employee No. . . . .	System Code. . . . .	06	05			
#AO			Date - As of	System Code. . . . .	08	05			
#APL			Yes or No - Move to	System Code. . . . .	08	05			
#ASI				Alpha Description. .	Item Number-(If Trade	Item Number-(If Trade In)	Input No		
#BW			Amount - Total Gross	System Code. . . . .	06	05			
#BX			Amount - Total Exclu	System Code. . . . .	06	05			
#CAP			Current Load	Data Display Rules		CODE			
				Data Display Rules		2			
#CCD			Step Progression Pro	System Code. . . . .	06	05			
#CCL				Alpha Description. .	Balance - Cumulative C	Balance - Cumulative Agreement			
#CLO			Over Credit Limit (Y	Data Edit Rules. .	VALUE	VALUE			
				Data Edit Rules Spe	Y N 1 0	' Y N 1 0			
#CLR			Display Cleared Reco	System Code. . . . .	06	05			
#CQ			Cumulative Quantity	Data Item Class. .		QTYINV			
#CRE			Total - Credits	System Code. . . . .	25	09			
#CTY			Configuration Type	System Code. . . . .	99	97			
#CUH			Amount - Current Hou	Data Item Class. .	CURRENCY				
#CVR				Alpha Description. .	Variance - Contract Im	Variance - Agreement Imbalance			
#DCP			Data Type Descriptio	System Code. . . . .	08	05			
#DD1			Density Type - Displ	Data Edit Rules. .	UDC	UDC			
				Data Edit Rules Spe	39	41B			
				Data Edit Rules Spe DT		DT			
#DD2			Density Type - Displ	Data Edit Rules. .	UDC	UDC			
				Data Edit Rules Spe	39	41B			
				Data Edit Rules Spe DT		DT			
#DD3			Density Type - Displ	Data Edit Rules. .	UDC	UDC			
				Data Edit Rules Spe	39	41B			
				Data Edit Rules Spe DT		DT			

## DREAM Writer Merge

The Data Record Extraction and Manipulation facility (DREAM Writer) serves as a powerful data manipulator and cataloging system. DREAM Writer (files F98301, F98311, F98312, F9831, and if you are upgrading from release A6.2, F98302 and F98303) lets you create unlimited variations of standard J.D. Edwards reports and videos. It controls the data records that are selected for the specific version and the sequence of the records as they appear on the printed page.

The DREAM Writer merge updates the DREAM Writer versions in your production data library with current information in the JDFDATA library. It runs off the Software Versions Repository Master file (F9801).

The Software Versions Repository merge must run before the DREAM Writer merge.

NOTE: All versions delivered in the J.D. Edwards data library are prefixed by the letters XJDE or ZJDE.

The merge does the following to XJDE versions:

- Adds new form IDs and their associated versions
- Adds new XJDE versions to existing form IDs
- Replaces existing versions
- Deletes obsolete XJDE versions

The merge does the following to ZJDE versions:

- Adds new form IDs and their versions
- Adds new ZJDE versions to existing form IDs

The merge also does the following to existing ZJDE versions and your custom versions:

*For additional parameters*

- Updates the following fields:
  - Based On File
  - Based On Member
  - Format Name
  - File Prefix
  - File Output Type
  - Override Logical File
  - Type Report Totaling
  - Optimize Option

- Sequential Only
- Open for Output
- Open for Update
- Open for Delete
- Does not update the following fields:
  - Job To Execute
  - Printer Overrides
  - Version Title/Optional Report Title
  - Print Cover Page (Y/N)
  - Mandatory Processing Option
  - Job Queue
  - User Exclusive (0/1/2/3)
  - Output Media

NOTE: You will perform application specific instructions (ASIs) to update these fields if changes are necessary.

### *For processing options*

- Updates processing option text
- Assigns a default selection value (if specified) for new processing options
- Converts selection values for existing options only if changes are made to any of the following fields:
  - Data Field Name
  - Data Item Size or Type
  - Date Field Type
  - Right Justify Type

### *For data selection*

- Converts selection values accordingly if changes were made to field attributes
- Removes the selection criteria for fields that no longer exist in the based-on file
- Does not make changes to data selection values for existing optional fields
- Changes the selection criteria to match the J.D. Edwards settings for non-optional fields

## **Merges and Control Files (Reinstallations Only)**

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- For custom versions, adds selection criteria that J.D. Edwards has added to the first changed XJDE version associated with the form ID
- For existing ZJDE versions, adds selection criteria that J.D. Edwards has added to the corresponding ZJDE versions (at the new release) associated with the form ID

### *For data sequence*

- For non-optional sequence fields, applies all specified changes to the field
- For optional sequence fields, changes the field name only if the old field name no longer exists in the based-on file
- For custom versions, changes totaling level, page break, and sequence A/D only if the field name is the same as in the first changed XJDE version associated with the form ID
- For existing ZJDE versions, changes totaling level, page break, and sequence A/D only if the field name is the same as in the corresponding ZJDE versions (at the new release) associated with the form ID
- For custom versions, adds new sequencing criteria that J.D. Edwards has added to the first changed XJDE version associated with the form ID
- For existing ZJDE versions, adds new sequencing criteria that J.D. Edwards has added to the corresponding ZJDE versions (at the new release) associated with the form ID
- Deletes sequence fields that no longer exist in the based-on file

## Vocabulary Overrides Merge

The Vocabulary Overrides file (F9220) lets you change the text information on J.D. Edwards screens and reports to reflect your own terminology or language. The Vocabulary Overrides merge updates the vocabulary override records in your production data library with current vocabulary override information in the JDFDATA library.

The merge selects records in the Software Versions Repository Master file (F9801) that have function code DSPF, PRTF, or PRTS, and:

- Adds vocabulary override records for new Display/Printer files
- Changes Line 24 error text and messages, and default screen titles
- Adds new fields to existing vocabulary override records if they have prefix VTX
- Deletes VTX fields that are not delivered in the JDFDATA library.

NOTE: If you have added VTX fields to a video or report with the standard J.D. Edwards name, you could lose VTX fields.

- Updates fields in existing vocabulary override records with new text if the override flags for the fields are either blank or J
- Replaces all function key definitions

In final mode, the merge does not update VTX fields that have a Y in the override field. If changes exist for these fields, you will find them documented in the Vocabulary Overrides Merge report (R98721) you create when you run this merge.

### NOTES:

- The Data Dictionary/Vocabulary Overrides/DREAM Writer Rebuild job could replace the text descriptions again with your company-specific text.
- The Vocabulary Overrides merge totally replaces the function key translation files (F9601 and F9611). If these files contain your own custom information, you must enter the information again after the merge completes.

## Vocabulary Overrides Merge Reports

The Vocabulary Overrides merge produces two reports. The first report (R987212) lists the vocabulary overrides that were changed in your production data library. It shows the following updates.

- New text descriptions for VTX fields
- Overrides added
- VTX fields deleted
- New VTX fields or new screens

## Merges and Control Files (Reinstallations Only)

This report is provided for your information only. An example of the report appears below.

987212	J.D. Edwards & Company Vocabulary Overrides Merge Vocabulary Overrides Changed Report			Page - 1 Date - 2/05/96 From Libr - JDFDATA To Libr - COMMON Mode - Final
<u>Object Nam</u>	<u>Field Name</u>	<u>Old Text Description</u>	<u>New Text Description</u>	<u>Change Description</u>
R00067	R00067	Data Dictionary Date Verificat		New Video/Report
R0004P	VTX004	INSTALL	Ins	New Text Description
R0004P	VTX005	Description	Description	New Text Description
R0004P	VTX006	Code	Code	New Text Description
R0004P	VTX010	(Y/N)	(Y/N)	New Text Description
R0004P	VTX012	User	Use	New Text Description
R0004P	VTX017		Sys	New VTX Field
R0005P	VTX004	INSTALL	Sys	New Text Description
R0005P	VTX011		Ins	New VTX Field
R0005P	VTX012		User	New VTX Field
R0006P	VTX009	Co	Comp	New Text Description
R00067		Alternate Description Report		New Video/Report
R0008BP	VTX002		P	New VTX Field
R0008BP	VTX005	Begin	Begin	New Text Description
R0008BP	VTX007		T	New VTX Field
R0008BP	VTX008		. . .Period Ending Dates/Centuries. . .	New VTX Field
R0008BP	VTX010	Year	Year	New Text Description
R0008BP	VTX011	02/14	02/11/20	New Text Description
R0008BP	VTX016	26/38/50	29/38/47	New Text Description
R0008BP	VTX017	03/15	03/12/21	New Text Description
R0008BP	VTX018	27/39/51	30/39/48	New Text Description
R0008BP	VTX019	04/16	04/13/22	New Text Description
R0008BP	VTX021	31/43	34/43/52	New Text Description
R0008BP	VTX022	25/37/49	28/37/46	New Text Description
R0008BP	VTX023	01/13	01/10/19	New Text Description
R0008BP	VTX024	28/40/52	31/40/49	New Text Description
R0008BP	VTX025	05/17	05/14/23	New Text Description
R0008BP	VTX026	29/41/53	32/41/50	New Text Description
R0008BP	VTX027	06/18	06/15/24	New Text Description
R0008BP	VTX028	30/42/54	33/42/51	New Text Description
R0008BP	VTX029	07/19	07/16/25	New Text Description
R0008BP	VTX030	08/20	08/17/26	New Text Description
R0008BP	VTX031	32/44	35/44/53	New Text Description
R0008BP	VTX032	09/21	09/18/27	New Text Description
R0008BP	VTX033	33/45	36/45/54	New Text Description
R0008BP	VTX006	Period		Deleted VTX Field
R0008BP	VTX020	End of		Deleted VTX Field
R0008BP	VTX034	10/22		Deleted VTX Field
R0008BP	VTX035	34/46		Deleted VTX Field
R0008BP	VTX036	11/23		Deleted VTX Field
R0008BP	VTX037	35/47		Deleted VTX Field
R0008BP	VTX038	12/24		Deleted VTX Field
R0008BP	VTX039	36/48		Deleted VTX Field
R0008P	VTX002		T	New VTX Field
R0008P	VTX005	Begin	Begin Fisc.	New Text Description
R0008P	VTX006	Per 01	Per 01	New Text Description
R0008P	VTX007	Per 02	Per 02	New Text Description
R0008P	VTX008	Per 03	Per 03	New Text Description
R0008P	VTX010	Year	Date/Cent.	New Text Description
R0008P	VTX011	Per 10	Per 10	New Text Description
R0008P	VTX012	Per 04	Per 04	New Text Description
R0008P	VTX014	Per 06	Per 06	New Text Description
R0008P	VTX015	Per 07	Per 07	New Text Description
R0008P	VTX016	Per 11	Per 11	New Text Description
R0008P	VTX017	Per 12	Per 12	New Text Description

The second report (R98721) lists VTX fields in your production data library that have a Y in the override field and would have been affected by the merge if the override flags for those fields had been blank or J. These vocabulary overrides were not changed in your production data library. The report compares text descriptions for VTX fields in your production data library (Old Text Description) to JDFDATA. An example of the report appears below.

98721		J.D. Edwards & Company		Page	-	1
		Vocabulary Overrides Merge		Date	-	2/05/96
		Vocabulary Overrides Not Changed		From Libr	-	JDFDATA
		Because of Overrides		To Libr	-	COMMON
				Mode	-	Final
Video Name	Field Name	Old Text Description	New Text Description			
V06932	VTX003	Pay	Pay			
V06932	VTX006	Pay	Pay			
V08320	VTX002	Elig. Table 1. . . . .	Init Elig Table. . . . .			
V08320	VTX009	Dep/Ben (Y/N). . . . .	Depend/Benef (Y/N). . . . .			
V08320	VTX020	Elig. Table 2. . . . .	Cont Elig Table. . . . .			
V08320	VTX021	Enter Amt/Rate (Y/N) ..	Enter Amt/Rt (Y/N) ..			
V08320	VTX032	Flex Amt (Y/N) . . . . .	Flex Amount (Y/N) . . . . .			
V08390	VTX011	Minimum Service. . . . .	Comp Period			
V08390	VTX012	Basis (Y,M,D). . . . .	Eligible Enrollment:			
V08390	VTX013	Or	Ineligible Enrollment:			
V08390	VTX014	Program 1. . . . .	Status . . . . .			
V08390	VTX015	Program 2. . . . . ined 2 . . . . .	Date Code. . . . .			
V08520	VTX007	Begin Plan Year M/D. . . . .	Begin Year (MM/DD) . . . . .			
V08520	VTX008	Depend/Benefic . . . . .	Depend/Benefic Y/N . . . . .			
V12214	VTX020	Depr Meth:	Dep Meth:			
V3003	VTX016	Crew Size. . . . .	Crew			
V3003	VTX026	P.O.(Y/N) . . . . .	PO (Y/N) . . . . .			
V3003	VTX029	Pay Point	Pay Point. . .			
V42025	VTX024	Sufix.	Suffix			
V42025	VTX025	Cust PO. .	Branch/Plant. .			
V42060	VTX032	Doc. Type	Order Type . . . . .			
V42060	VTX042	Brn/Plt . . . . .	Brn/Plt. . . . .			

## User Defined Codes Merge

The User Defined Codes files (F0004 and F0005) let you define codes, relate them to code descriptions, and assign values for certain fields. The User Defined Codes merge updates some user defined codes in your production data library with current user defined code information contained in the JDFDATA library.

The User Defined Codes merge:

- Adds new user defined code tables and their values for all system codes
- Adds new user defined code values to existing tables located in system codes 84 through 99 and in system code 00, record type IO
- Adds new user defined code values to other existing tables if the Hardcoded (Y/N) field is set to Y
- Changes the values in the Code Length, Code Num (Y/N), and 2nd Line (Y/N) fields in existing tables

NOTE: If the code length changes, the merge converts the code values in the User Defined Codes file (F0005) automatically.

## Merges and Control Files (Reinstallations Only)

- Changes the Hardcoded (Y/N) field for code values to match the J.D. Edwards default settings
- Adds the user defined code detail text if requested

In final mode, the merge does not change or delete user defined code values for existing tables. You must perform the application specific instructions to make these updates. To do these updates, see *Application Specific Instructions* in this publication.

### User Defined Code Merge Report

The User Defined Code Merge report (R987241) lists changes to the User Defined Code Types file (F0004) and additions to the User Defined Codes file (F0005). It does not list new user defined code tables. An example of the report appears below.

987241		J.D. Edwards		Date - 2/05/96				
		User Defined Code Merge		Page - 1				
				From - JDFDATA				
				To - COMMON				
				Mode -				
INS	Code	Code	Description 1	Description 2	Cde	2ND	Cde	Merge
	Type				Ln	Lne	Num	Result
00	CM		Address Book Credit Messages		02			F0004 Updated
00	HC		Special Handling Code-A/P Cks		03			F0004 Updated
00	IO		I/O Control Limit Exceeded					
	IO	P03114	2000					F0005 Added
	IO	P04257	250					F0005 Added
	IO	P042571	250					F0005 Added
	IO	P042572	250					F0005 Added
	IO	P042573	250					F0005 Added
	IO	P09131	1000					F0005 Added
	IO	P09181	1000					F0005 Added
	IO	P12214	250					F0005 Added
	IO	P41200	100					** Already Exists
	IO	P41202	17					** Already Exists
	IO	P41240	17					** Already Exists
	IO	P46VTX	99999					F0005 Added
	IO	P93130	4000					F0005 Added
00	LD		Level of Detail		Y			F0004 Updated
00	NV		INTRASTAT regeme code		05			F0004 Updated
00	TM		Mode of Transport		03			F0004 Updated
01	SC		Standard Industry Code		10			F0004 Updated
01	ST		Search Type		03			F0004 Updated
06	T1		Category Code 01		Y			F0004 Updated
96	PT		Program Type					
	PT	007	Special Program					F0005 Added
96	SY		Upgrade Planner Systems					
	SY	37	Quality Management					F0005 Added
97	RL		Release Level					
	RL	A7.1	AS/400 Release A7.1					F0005 Added
98	FN		Function Codes					
	FN	APPL	Everest Application					F0005 Added
	FN	BSFN	Business Functions					F0005 Added
	FN	BSVW	Business View					F0005 Added
	FN	EVFM	Everest Form					F0005 Added
	FN	TBLE	Table Definition					F0005 Added

## Generic Text Application Key Files Merge

The Generic Text Application Key files (F00161 and F00162) contain the key fields that are used on generic text windows (program P0016) to access the generic text. For example, F14 (Memo) on the User Defined Codes screen accesses the User Defined Code Detail window (a generic text window), which displays descriptive text about a specific user defined code. The three key fields displayed at the top of the window are defined in the Generic Text Application Key files. The Generic Text Application Key Files merge updates the keys in your production data library with current key information in the JDFDATA library. This merge does not produce a report.

## Menus Merge

The Menus merge:

- Produces a report that lists the menus added to your production data library during the upgrade process
- Produces a report that lists the obsolete menus in your production data library

NOTE: You can delete the obsolete menus automatically during the upgrade process by setting the Delete Obsolete Menus field in the upgrade planner to 1.

- Updates the Help Instructions Key, Option Control, Option Key, Version, Batch, and Highlight fields on existing menus for specific jobs

NOTE: The merge does not change your security settings.

- Updates some obsolete programs with replacement programs if possible
- Identifies new and obsolete programs on existing menus

NOTE: If a program is obsolete, the merge attaches a menu message to the selection that warns you about using an obsolete program.

The upgrade planner lets you update your menus or replace them entirely.

- In final mode, the merge updates all of your menus except where you have customized them. Use final mode if you have customized the standard menus that J.D. Edwards sent to you.
- In replace mode, the merge entirely replaces the J.D. Edwards menus in your production data library with new menus, but retains your custom menus. It changes selections on your custom menus if necessary for the new release. You will lose any custom translations of the J.D. Edwards menus. Use replace mode if you have not changed the J.D. Edwards menus except for adding security.

NOTE: Your security setup for menus and menu selections are not affected when you run the merge in final or replace mode. In addition, the merge replaces all software installation menus (system code 97) regardless of the mode you choose.

### **Menu Merge Reports**

The Menus merge produces three reports:

- Menu Additions
- Obsolete Menus
- Menu Merge Exceptions

The Menu Additions report (R97883B) lists the menus that the merge added to your production data library. Some selections on these menus could be secured because they call jobs that were previously secured in your menu file. An example of the report appears below.

97883B		J.D. Edwards & Company	Page - 1
		Menu Additions	Date - 2/05/96
			Mode - Update
FROM Library -	JDFDATA		
TO Library -	COMMON		
Menu Id	Menu Title		
G	Master Directory		
G00	General Systems		
G0021	Tax Processing & Reporting		
G00211	EC VAT Processing		
G00212	Japanese Consumption Tax		
G00213	Italian IVA Processing		
G002131	Additional Italian Tax Processing		
G00214	French VAT Processing		
G01	Address Book		
G0121	Periodic Processes		
G0131	A/B Advanced & Technical Operations		
G01311	Address Book Organizational Structure		
G01312	CIF Supplemental Data		
G01313	Batch Address Processing		
G0141	Address Book Setup		
G01411	Address Book Category Codes		
G01412	Who's Who Category Codes		
G02	Electronic Mail		
G03	Accounts Receivable		
G0311	Customer & Invoice Entry		
G03111	Other Invoice & Receipts Entry Methods		
G03111GB	Other Invoice & Receipts Entry Methods		
G031111	A/R Drafts Daily Operations		
G031112	A/R Draft Remittance & Collection		
G0312	Manual Receipts Processing		
G0313	Automatic Receipts Processing		
G0314	Accounts Receivable Reports		
G0315	Credit & Collection Management		
G03151	Credit Reporting Tapes		
G0321	Periodic Processes		

## Merges and Control Files (Reinstallations Only)

The Obsolete Menus report (R97883C) lists J.D. Edwards menus that are obsolete under the release to which you are upgrading. You can delete the obsolete menus automatically during the upgrade process by setting the Delete Obsolete Menus field in the upgrade planner to 1. If you do not set this field to 1, the obsolete menus remain on your system, and the merge updates them as if they are custom menus. J.D. Edwards recommends that you review and remove these menus if possible. An example of the report appears below.

TO Library - COMMON		J.D. Edwards & Company Obsolete Menus	Page - 1 Date - 2/05/96 Mode - Update
Menu Id	Menu Title		
A	Master Directory		
A0	General Business Systems		
A001	Other Systems		
A0011	Org. Structure by C.C. Category Codes		
A0012	Organizational Structure by Cost Center		
A0013	Organizational Structure by Position		
A0014	Organizational Structure by Employee		
A0021	Sales, Purchases & VAT Taxes		
A003	Additional Features		
A0031	General System Setup		
A0032	Defining the Organizational Structure		
A0033	Advanced Operations		
A00332	EC VAT Processing		
A00333	Japanese Consumption Tax		
A00334	Italian IVA Processing		
A004	Technical Operations		
A01	Address Book		
A012	Search Word Rebuilds		
A013	Advanced Operations		
A0131	Address Book Setup		
A01311	Address Book Category Codes		
A01312	Who's Who Category Codes		
A0132	Supplemental Data		
A0133	Batch Input Address Processing		

The Menu Merge Exceptions report (R97883A) lists specific changes the merge made to menu selections that you should review before you use them. The issues you need to resolve appear in the Message column on the report. Possible messages are:

*New pgm for release.* Indicates that the program was added to a menu. Consider setting up menu security for the menu selection.

*Program may be obsolete.* Indicates that the program shown in the Job to Execute column on the report is obsolete and the merge did not find a program to replace it. The merge attaches a menu message warning to a menu selection that accesses an obsolete program. You should remove the program from the menu unless the program exists in a custom library and you want to use it. You can remove the menu message if necessary.

*\*Review Security.* Indicates that you must review the added menu selection for security setup. The selection is secured because it calls a job that was previously secured in your menu file. However, security setup is inconsistent, and requires your review.

*Cannot add sel to menu.* Indicates that the merge unsuccessfully attempted to add a selection because no selection spaces were available on the menu. You must add the selection to a menu if you want to use it.

*Opt key/vers not found.* Indicates that the merge did not find the particular form ID or version in your DREAM Writer files. If you determine that you need the form ID or version, then resolve this problem before you run the selection.

## **Merges and Control Files (Reinstallations Only)**

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An example of the report appears below.

J.D. Edwards & Company Menu Merge Exceptions						Page - 1 Date - 2/05/96 Mode - Replace	
Menu Id	Menu Title	Sl No	Selection Description	Job to Execute	Option Key	Version	Message
G08E3	Employee Advanced/Technical Op	03	Purge Employee Job File	J0601182	P0601182		New pgm for release
		14	Compa-Ratio Calculation	J082501	P082501		New pgm for release
G08E43	International Information Setu	07	Division Codes	J0006A	P0006A		New pgm for release
		14	Canadian EE Setup	P08021			New pgm for release
G08H1	Employee History	04	Employee Multiple Job History	J060119	P060119	ZJDE0001	New pgm for release
G08J1	Job Specifications	16	Pay Ranges by Job	J082450	P082450		New pgm for release
G08J2	Pay Grade/Step Administration	03	Create Review Work Group	J082005	P082005		New pgm for release
		04	Review Work Group Summary	J082009			New pgm for release
		05	Review Work Group Detail	J082007			New pgm for release
		06	EE Master/EE Job File Update	J082008	P082008		New pgm for release
G08J4	Job Specifications Setup	15	Pay Grade Step Table	J082003			New pgm for release
G08P1	Position Control	17	Position Headcount	J081441	P081441		New pgm for release
G08P3	Position Control Advanced/Tech	18	Requested (J08902)	J08902	P08902	ZJDE0001	New pgm for release
		19	Approved (J08902)	J08902	P08902	ZJDE0002	New pgm for release
		20	Final (J08902)	J08902	P08902	ZJDE0003	New pgm for release
		22	Create Batch (J08911)	J08911	P08911	ZJDE0001	New pgm for release
G08W2	Wage & Salary Administration	14	Compa-Ratio Calculation	J082501	P082501		New pgm for release
G08W4	Wage & Salary Administration	15	Pay Grade/Step Table	J082003			New pgm for release
G0911	Journal Entry, Reports, & Inqu	08	Post General Journal	J09800	P09800	ZJDE0001	* Review Security
G0921	Account Reconciliation	08	Debit/Credit Match	J09131D	P09131D	ZJDE0001	New pgm for release
G09211	Bank Statement Processing	10	Post General Journal Batches	J09800	P09800	ZJDE0001	* Review Security
G0931	G/L Advanced & Technical Opera	03	G/L Cash Forecasting	J09520	P09520		New pgm for release
G09311	Batch Journal Entry Processing	02	Journal Entry Field Mapping	J09110MAP	P09110MAP		New pgm for release

## **Help Instructions Merge**

The Help Instructions merge replaces the help information in your production data library with current help information. It does not produce a report.

## **Generic Message/Rates Merge**

The Generic Message/Rates merge is similar to the User Defined Codes merge except that it includes the free form text associated with the rate on the message. The merge:

- Adds new user defined code tables and their values for all system codes
- Adds new user defined code values for existing tables located in system codes 84 through 99 and in system code 00, record type IO

In final mode, the Generic Message/Rates merge does not add new values for existing tables located in system codes 01 through 83. In addition, it does not add new values for system code 00 except for record type IO. You must perform the application specific instructions to make these updates.

NOTE: The User Defined Codes merge must complete successfully before you run this merge.

## Generic Rate/Message Update Report

The Generic Rate/Message Update report (R98725) lists all table and code updates, including messages and rates. An example of the report appears below.

98725	J.D. Edwards & Company Generic Message/Rates Update			Date - 2/05/96 Page - 1 From - JDFDATA To - PRODDATA
Inst User Code Code	User Def Code	Description	Description	Current Rate
32 EM		Editing Messages		New Rate/Msg Type
32 EM 2A		Editing Message	1.00 This is an example of an editing message used for 2.00 configurator processing. 4.00 5.00 If the Bore is greater than 2" (50.8), than the cylinder 6.00 should be double roded.	New Rate/Msg Value
32 SN		Standard Text		New Rate/Msg Type
32 SN 1001		General Assembly Procedure	12.00 This is an example of creating a general assembly procedure 13.00 that could print out for many parts and processes having to 14.00 enter it into the system only once. 16.00 17.00 Assemble Component Electrical Harness per the drawing and 18.00 schematic included with the shop packet. 19.00 20.00 Connect all the hydraulic connections as shown on special 21.00 attachment sheet HDR-XXXX. (XXXX refers to the part number).	New Rate/Msg Value
32 SN 1002		Quality Control General Proc	1.00 ***** 2.00 QUALITY IS JOB ONE!!!!!! 3.00 ***** 4.00 1. Retrieve Quality Control Checklist from Master File 5.00 and create duplicate copy for use as permanent file 6.00 of this procedure. 7.00 2. Setup necessary testing equipment. If this is a 8.00 destructive test step, ensure that Form 817 Quality 9.00 Scrapped is prepared and authorized. 10.00 3. Perform Quality Assurance Review as outlined on Document 11.00 obtained in step 1.	New Rate/Msg Value

## Rebuild DD/VO/DW

The Rebuild DD/VO/DW job updates the vocabulary override and DREAM Writer files with your company-specific text that is stored in the data dictionary.

The Rebuild DD/VO/DW job updates the vocabulary overrides fields with the row/column heading text specified in the data dictionary if the override flags for the fields are blank.

This job does not produce a report.

NOTE: The Data Dictionary and Vocabulary Override merges must complete successfully before you run this job.

## Automatic Accounting Instructions Merge

The Automatic Accounting Instructions merge adds new specifications (for company 00000 only) that were included since you last upgraded your software. The merge adds them without any account number specifications.

NOTE: This merge affects the Automatic Accounting Instructions Master file (F0012). It does not affect the automatic accounting instructions (AAIs) for the Distribution and Payroll systems.

### New Automatic Accounting Instructions (AAI) Report

The New Automatic Accounting Instructions (AAI) report (R98727) lists the items that were added to your production data library. Modify them to match your specific accounting structure. An example of the report appears below.

98727	J.D. Edwards New Automatic Acctg Insts(AAI)				Page - 1
					Date - 2/05/96
					From Libr - JDFDATA
					To Libr - COMMON
					Mode - Proof
Item Number	Co	Sequence Number	Syst Code	Account Use Description	
-----	-----	-----	-----	-----	
RV	00000	3.335	03	Unrealized Gain on Foreign Currency Payments RVxxx xxx = Currency code	
RW	00000	3.335	03	Unrealized Loss on Foreign Currency Payments RWxxx xxx = Currency code	
PCWHL	00000	4.041	04	Withholding Taxes Payable To be used with the A/P Calculate Withholding Program	
PV	00000	4.075	04	Unrealized Gain on Foreign Currency Payments PVxxx xxx = Currency Code	

## Next Numbers Merge

The Next Numbers merge adds index lines for existing systems. It also adds index line specifications for new systems. All new next numbers are set initially to 1.

### New Next Numbers Report

The New Next Numbers report (R98728) lists the new index lines for existing systems and the index line specifications for new systems. An example of the report appears below.

98728	J.D. Edwards New Next Numbers			Page - 1 Date - 2/05/96 From Libr - JDFFDATA To Libr - COMMON Mode - Final
Syst Code	Description	NN Index	Use Description	Chk Dgt
00	World Foundation Environment	02	(future SNFcon)	N
09	General Accounting	06	Reconciliation	N
12	Fixed Assets	05	Rule Number	Y
19	Utility CIS	01 02 03	Service Address Service Agreemt Billing Control	N N N
40	Inventory/OP Base	04 05 06 07	Text ID Number Item/Addr ID Price Adj ID Act Based Acct	N N N N
41	Inventory Management	07	Inv. Re-Class	N
4150		01 02	Meter Number Filling Line No	N N

## Run Individual Merges

The upgrade software lets you run the following merges separate from the main upgrade process:

Software Versions Repository  
Data Dictionary  
DREAM Writer  
Vocabulary Overrides  
User Defined Codes  
Generic Text Application Keys  
Menus  
Help Instructions  
Generic Message/Rates  
Data Dictionary/Vocabulary Overrides/DREAM Writer Rebuild  
Automatic Accounting Instructions  
Next Numbers

## **Merges and Control Files (Reinstallations Only)**

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Before you run a merge, you must set up an upgrade plan that specifies to run that merge only. This plan should be based on the upgrade plan you used for the main upgrade process.

**IMPORTANT:** You must run certain merges before you run others. These dependencies are listed below:

- Run the Software Versions Repository merge before you run any other merge.
- Run the Data Dictionary, DREAM Writer, and Vocabulary Overrides merges before you run the Rebuild DD/VO/DW job.
- Run the User Defined Codes merge before you run the Generic Message/Rates merge.
- Run the DREAM Writer merge before you run the Menus merge.

Perform the following procedures to set up an upgrade plan to run a single merge and to run the merge.

### **Set Up the Merge Upgrade Plan**

To run an individual merge, you must set up an upgrade plan to run that merge only. J.D. Edwards recommends you create a new upgrade plan by performing the following steps:

1. Sign on as JDEINSTAL.

The Software Upgrade Menu (A97IBM) appears.

2. Select Work with Upgrade Planner.

The Plan the Upgrade screen appears.

3. In the Action Code field, type I (Inquire).

4. In the Plan Name field, enter the name of the upgrade plan you used for the main upgrade process.

5. In the Action Code field, type A (Add).

6. In the Plan Name field, type a name for the new upgrade plan.

7. In the Description field, enter a description for this plan.

8. In the Action Code field, type I (Inquire).

9. In the Plan Name field, enter the name of the upgrade plan you added.

10. Press F5 to enter upgrade data.

11. From the Libraries for This Plan screen, press Enter.

The Systems to Install/Upgrade screen appears.

12. The Systems to Upgrade field is set to 1 for each system you have purchased. J.D. Edwards strongly recommends that you do not change these values.
13. Press Enter.

The Merge Information screen appears.

14. In each of the merge fields on the left side of the screen (except for the merge you want to run), type 0 (No Merge).
15. In the field for the merge you want to run, type 2 (Final). If you want to run the Help merge, type 3 (Replace) in the Help Master Merge field.

NOTES:

- If you choose to run the Data Dictionary, DREAM Writer, or Vocabulary Overrides merge, you also must set the Data Dictionary/Vocabulary Override/DREAM Writer Rebuild mode to 2 (Final).
- You can set the Menus merge mode to 3 (Replace).

16. After you verify your information, press Enter, and then press F3 (Exit).
17. Sign off.

### Run the Merge

To run the merge:

1. Sign on as a user who accesses the production library you want to update.
2. From the Merges menu (G97R41), select Standalone Merges.

A processing options screen appears.

3. In the first processing option field, type the name of the upgrade plan that is set up to run the specific merge.
4. In the second processing option field, enter \*NONE.

The merge submits to batch.



# Merges and Control Files (PTFs Only)

This chapter explains control files, which define the basic structure of J.D. Edwards software, and describes the merges that update them. The information in this chapter applies to PTFs only.

## Control Files

J.D. Edwards software consists of control files that make up its basic structure. These files organize and sequence the information that you put into the J.D. Edwards system. In addition, the files determine the types of operations to be performed on the input data. For example, the Data Dictionary files (F9200, F9201, F9202, F9203, F9204, F9205, F9816, and F98163) define all specifications for any data item in J.D. Edwards software. Control files differ from transaction files in the following ways:

- Control files contain data that is shared between J.D. Edwards and you, but transaction files contain unique data provided by you only.
- Transaction files can be converted but will never have J.D. Edwards data merged into them.

Many of the control files can be modified by you. For instance, you can change a menu to better suit your business needs. Because you can modify the control files, J.D. Edwards does not automatically modify them with J.D. Edwards data when you perform a PTF installation. The upgrade process for the control files has two general steps:

- Merges – When you run the merges, they automatically add new items to the control files or change certain aspects of the files that are not affected by customization.
- Application Specific Instructions (ASIs) – The ASIs explain how to update those aspects of the files that could contain customized data. For more information about ASIs, see *Application Specific Instructions* in this publication.

This two-step upgrade process protects your tailored information from being overlaid by J.D. Edwards information.

### **Merge Process Overview**

The main upgrade job merges the control files in the J.D. Edwards data library into your existing control files, which are in your common library or production data libraries. After the control file merges complete, your vocabulary overrides must be updated with row and column description text that is stored in the data dictionary. The upgrade process does this automatically by submitting the Rebuild DD/VO/DW job. After this job completes, you may need to apply application specific instructions (ASIs) to finish updating your control files. For information about ASIs, see *Application Specific Instructions* in this publication.

The upgrade process submits the merges automatically. If you must submit an individual merge from the Merges menu (G97R41), see *Run Individual Merges* in this chapter.

### **Proof and Final Modes**

You can run the merges in two ways:

- Proof Mode – Creates merge reports but does not update control files. By using this mode, you can examine the changes that are reported without updating your files.
- Final Mode – Creates merge reports and updates certain aspects of items in the control files.

You specify the modes in which the merges should run on the Merge Information screen in the upgrade planner. For information about setting the modes, see the *PTF Install Workbook*.

### **Merge Sequence**

The merges are submitted automatically during the PTF installation process. The merges and updates that are submitted automatically include:

Software Version Repository (J97885)  
Data Dictionary (J97882)  
DREAM Writer (J97886)  
Vocabulary Overrides (J97884)  
User Defined Codes (J97880)  
Generic Text Application Keys (J97888)  
Menus (J97883)  
Help Instructions (J97887)  
Generic Message/Rates (J97881)  
Data Dictionary/Vocabulary Overrides Text (J97889)

NOTE: If you must submit any or all of the above merges manually, you should do so in the order in which they appear above. Some merges require other merges to be run first. For information about how to submit a specific merge and for a list of dependencies, see *Run Individual Merges* in this chapter. For an explanation about what each merge does, see the appropriate merge section in this chapter.

## Software Versions Repository Merge

The Software Versions Repository files (F9801 and F9802) serve together as a master directory of information for all programs, files, screens, reports, and so forth, that exist in your J.D. Edwards software.

The Software Versions Repository merge updates the software versions repository members in your production data library with current member information in the PTF library.

The Software Versions Repository merge:

- Adds new records to the Software Versions Repository Master file (F9801) and the Software Versions Repository Detail file (F9802)
- Prints a report that lists updated members in the software versions repository
- Updates the following fields in existing members:
  - Member ID
  - Description
  - Function Code
  - Install System
  - Reporting System
  - Base Member Name
  - File Prefix
  - Maint/RSTDSP
  - Omit Option
  - Generation Sev (Severity)
  - Copy Data (Y/N)
  - Optional File
  - Common File

If your system has a J.D. Edwards source library, the merge adds records from the Software Versions Repository Detail file (F9802) in the PTF library to your production data library. In addition, the merge updates the following fields in detail records.

- Source Library
- Object Library

## **Merges and Control Files (PTFs Only)**

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- Source File
- SAR Number
- Version ID

NOTE: This merge must complete successfully before you run any other merge.

## **Software Versions Repository Merge Report**

The Software Versions Repository Merge Report (R98726A) lists the members in your production data library that are affected by the merge. For each member, the report shows field values as they are before and after the merge. An example of the report appears below.

98726A		J.D. Edwards & Company SVR Merge Report						Page No. . . . 1	
TO Library (Old info.) = COMMON								Date - . . . . 2/05/96	
FROM Library (New info.) = A73PC00001									
Member ID	Member Description	Inst Sys.	Rpt. Sys.	FN CD	Base Member	Copy Data	Optional File	Common File	Common File
ASSET	Old Info: New Info:			83 12					
CONVERT	Old Info: Software Installation - Conver New Info: Software Installation - Conver	97 88	97 88		J99600 J97612	N	N	N	
C00RSC	Old Info: New Info:		00 98	00 98					
C00SC	Old Info: New Info:		00 98	00 98					
C0000	Old Info: New Info:		94 98	94 98		N	N	N	
C0010	Old Info: New Info:		00 98	00 98					
C0015	Old Info: New Info:		00 98	00 98		N	N		
C00151	Old Info: New Info:		00 98	00 98		N	N		
C00161	Old Info: New Info:		00 98	00 98		N	N	N	
C00161OLD	Old Info: New Info:		00 98	00 98		N	N	N	
C0030	Old Info: New Info:		98 00	98 00		N	N	N	
C0036	Old Info: New Info:		00 98	00 98		N	N	N	
C0040N	Old Info: New Info:		98 88	98 88		N	N	N	
C0080	Old Info: New Info:		00 98	00 98					

## Data Dictionary Merge

The Data Dictionary files (F9200, F9201, F9202, F9203, F9204, F9205, F9816, and F98163) serve as the central definition point of all specifications for any data item in J.D. Edwards software. Data items include fields, menu messages, error messages, and help text. The Data Dictionary merge updates the data items in your production data library with current data dictionary information in the PTF library.

In final mode, the merge adds new data items and updates certain fields in your existing data items. It does not update fields in your data items that could contain information you defined for your own specific purposes.

The Data Dictionary merge:

- Adds new data items
- Updates the following fields in existing data items:
  - Alias Name
  - Alias Type
  - Alpha Description
  - Data File Decimals
  - Data Item Class
  - Size
  - Type
  - Glossary Group
  - Help Program
  - Install System Code
  - Item Occurrences
  - Item Parent
  - Next Number Index
  - Next Number System
  - Release Last Changed
  - Reporting System Code
  - Glossary – if requested (does all or none based on your decision)

## **Merges and Control Files (PTFs Only)**

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NOTE: The merge does not distinguish which data items you have tailored for your own purposes. Therefore, the fields listed before this note are updated on all existing data dictionary records. You may want to print the report first to determine what data items will be affected.

The Data Dictionary Merge does not update the following fields. You will make these updates by using the Data Dictionary Merge Report – Manual Changes (R98722). To make these updates, refer to *Phase 3 – Update Applications* in the *PTF Install Workbook*.

NOTE: Do not change display decimals for items QTYINV or CURRENCY.

- Column Title
- Display Decimals
- Data Display Parameters
- Data Display Rules
- Data Edit Rules
- Default Values
- Edit Rules Specifications
- Justify
- Row Description
- Language Preference

The Data Dictionary Merge Report – Replaced Changes (R98722A) lists data items that were automatically replaced by the merge.

**Data Dictionary Merge Reports**

The Data Dictionary Merge Report – Manual Changes (R98722) lists the manual updates you must make to data items in your production data library. An example of the report appears below.

98722	J.D. Edwards & Company Data Dictionary Merge Report Manual Changes				Page - 1
				Date - 2/05/96	
				To Libr: COMMON	
				From Libr: A73PC00001	
Data Item	Appl Over	Description	Field	Was	Change
UDBA		Include in Union Pla Row Description. . . . .	Union Deduction/Benefi	Include in Union Plan (Y,N). . . . .	
		Column Title 2 . . . . .	D	P	
UGE1		Canadian UI - GRS. ( Row Description. . . . .	Canadian Unemployment	Canadian UI - Grs. (Wk1) . . . . .	
UGE2		Canadian UI - Grs. ( Row Description. . . . .	Canadian Unemployment	Canadian UI - Grs. (Wk2) . . . . .	
UHR1		Canadian UI - Hrs. W Row Description. . . . .	Canadian Unemployment	Canadian UI - Hrs. Wkd(Wk1) . . . . .	
UHR2		Canadian UI - Hrs. W Row Description. . . . .	Canadian Unemployment	Canadian UI - Hrs. Wkd(Wk2) . . . . .	
UIPP		Canadian UI - Pay Pe Row Description. . . . .	Canadian Unemployment	Canadian UI - Pay Periods. . . . .	
UIST		Canadian UI - Status Row Description. . . . .	Canadian Unemployment	Canadian UI - Status Code. . . . .	
UMC		Quantity Type Default Value for Entry. . . . .		1	
UOM2		Unit of Measure - Se Row Description. . . . .	Secondary Unit of Meas	Secondary UOM. . . . .	
UOM3		Unit of Measure - Pu Row Description. . . . .	Purchasing Unit of Mea	Purchasing UOM . . . . .	
		Column Title . . . . .	U/M	PR	
		Column Title 2 . . . . .		UM	
UOM4		Unit of Measure - Pr Row Description. . . . .	Pricing Unit of Measur	Pricing UOM. . . . .	
		Column Title . . . . .	Pric	PR	
		Column Title 2 . . . . .	UM	UM	
UOM6		Unit of Measure - Sh Row Description. . . . .	Shipping Unit of Measu	Shipping UOM . . . . .	
UOPM		Units - Open Row Description. . . . .	Open Quantity. . . . .	Quantity Open. . . . .	
		Column Title . . . . .	Open	Quantity	
		Column Title 2 . . . . .	Quantity	Open	
		Units - Order/Transa Column Title 2 . . . . .		Ordered	
UORG		Unit Price - Entered Data Display Rules . . . . .	K	M	
UPAX		Units - Per Containe Data Display Rules . . . . .	4	M	
UPC		Units - Paid to Date Data Display Rules . . . . .	K	M	
UPTD		Units - Received Row Description. . . . .	Received Quantity. . . . .	Quantity Received. . . . .	
UREC			Received	Quantity	
		Column Title . . . . .	Received	Quantity	
		Column Title 2 . . . . .	Quantity	Received	
USER		User ID Data Edit Rules. . . . .	CHKOBJ		
		Data Edit Rules Specification	USRPRF		
VCHR		Payee Voucher Rules Default Value for Entry. . . . .		00	
VCH1		Payee Voucher Rules Default Value for Entry. . . . .		00	
VCST		Vacation - Status Co Display Decimals . . . . .	0		
VEND		Primary / Last Suppl Row Description. . . . .	Primary / Last Vendor	Primary / Last Supplier Number . . . . .	
		Column Title 2 . . . . .	Vendor	Supplier	
VERF		Version - Control Fl Data Edit Rules. . . . .	UDC		
		Data Edit Rules Specification	06		
		Data Edit Rules Specification	X1		

## Merges and Control Files (PTFs Only)

The Data Dictionary Merge Report – Replaced Changes (R98722A) lists the changes that are automatically made to data items in your production data library during the merge. An example of the report appears below.

98722A		J.D. Edwards & Company Data Dictionary Merge Report Replaced Changes			Page	-	1
Data Item	Appl Over	Screen Over	Description	Field	Was	Change	
##BM			Software Security Co	Data Item Size . .	00006	00010	
##SY			System Code	Data Item Size . .	00002	00004	
##11			Quantity - Forecasti	Data Item Class. .		QTYINV	
##12				Data Item Class. .		QTYINV	
#AAR			Amount - After round	Data Item Class. .		CURRENCY	
#AB			Amount - Actual Bill	System Code. . . .	51	88	
#AB3			Amount - Actual Gros	System Code. . . .	51	88	
#AB4			Percent Gross Profit	System Code. . . .	51	88	
#ACA			Asset Cost Account	Data Item Size . .	00027	00029	
#ACC			Calculated Activity	System Code. . . .	70	00	
#ACO			Account Number - Lon	Data Item Size . .	00026	00028	
#ADA			Accumulated Deprecia	Data Item Size . .	00027	00029	
#ADD			Address Line #7 (Sta	Data Item Size . .	00030	00040	
#ADS			Amount - Discount Av	Data Item Size . .	00011	00015	
#AID			Item/Tag Number	Help Program . . .		P12IS	
#AL			Name - Alpha	Data Item Size . .	00030	00040	
#ANF			Account Number - Inp	Data Item Size . .	00027	00029	
#ANI				Data Item Size . .	00026	00028	
#ANP			Alpha Description.	Payroll ID - Input (Mo	Employee No. . . . .		
#AN8			Alpha Description.	Address Number - Cash	Address Number - Receipts		
#AO1			Alpha Description.	Amount		Previous Billed Amount	
#APV			Alpha Description.	Generate A/P Voucher		Generate A/P Voucher - OBSOLETE	
#ARQ			Amount - Requested	Data Item Class. .		CURRENCY	
#ASC			Amount - Selected	Data Item Class. .		CURRENCY	
#ASH			Adjusted Share	Data Item Class. .		CURRENCY	
#ASR			Average Service Rate	System Code. . . .	01	88	
#AVD			Date - Available Dat	System Code. . . .	15	88	
#AVM			Date - Available Dat	System Code. . . .	15	88	
#AVY			Date - Available Dat	System Code. . . .	15	88	
#A1			Address Line	Data Item Size . .	00030	00040	
				Item Occurrences . .	007	009	
#A10				Data Item Type . .	P	0	
				Data Item Size . .	00015	00040	
				Data Item Class. .	CURRENCY		
				Alpha Description.	Amount - Net Posting 1	Address Line	
#A11			Address Line 1	Data Item Type . .	P	0	
				Data Item Size . .	00015	00040	

## DREAM Writer Merge

The Data Record Extraction and Manipulation facility (DREAM Writer) serves as a powerful data manipulator and cataloging system. DREAM Writer (files F98301, F98302, F98303, F98311, F98312, and F9831) lets you create unlimited variations of standard J.D. Edwards reports and videos. It controls the data records that are selected for the specific version and the sequence of the records as they appear on the printed page.

The DREAM Writer merge updates the DREAM Writer versions in your production data library with current information in the PTF library. It runs off the Software Versions Repository Master file (F9801).

The Software Versions Repository merge must run before the DREAM Writer merge.

For a PTF, the DREAM Writer merge:

- Updates the Based On File, the Format Name, and the Type Report Totaling fields in all versions in your DREAM Writer file with the version ZJDE0001 (or your 0001 version) DREAM Writer information in the PTF library
- Copies the Based On File name to the Format Name for changed versions if the Format Name is blank
- Adds new form IDs and their versions
- Adds new XJDE and new ZJDE versions to existing form IDs
- Replaces existing XJDE versions
- Adds XJDETR versions for J.D. Edwards training
- Replaces processing option text and adds new processing options to existing form IDs
- Updates the following additional fields:
  - File Output Type
  - Override Logical File
  - Open Query File Options (for example, Optimize Option)
  - Print Instructions (Y/N)

The DREAM Writer merge does not make the following updates. You must perform the application specific instructions to make these updates. To do these updates, see *Application Specific Instructions* in this publication.

- Add or change values in existing processing options (all versions, including DEMO)

## **Merges and Control Files (PTFs Only)**

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- Update the following fields:
  - Job To Execute
  - Selection/Sequencing
  - Printer Overrides
  - Version Title/Optional Report Title
  - Print Cover Page (Y/N)
  - Mandatory Processing Option
  - Job Queue
  - User Exclusive (0/1/2/3)
  - Output Media

## **Merge DREAM Writer Specifications Report**

The DREAM Writer Merge Report (R98723) lists, in a general way, DREAM Writer changes and additions. An example of the report appears below.

98723	J.D. Edwards & Company Dream Writer Merge Report		Page - 1 Date - 2/05/96 From Library: A73PC00001 To Library: COMMON Mode: Final
Form ID	Change	Action Taken	
DISTMSG	New Program	Added	
PHRED	New Program	Added	
P0001P	New Program	Added	
P0003P	New Program	Added	
P0005A	File Prefix Based On File Format Name	Changed Changed Changed	
P0005CVT	New Program	Added	
P0005P	New Program	Added	
P0006P	New Program Sequential Only Access Optimize Option Output Open Option Update Open Option Delete Open Option	Added Changed Changed Changed Changed Changed	
P0006QD	New Program	Added	
P0006S1	New Program	Added	
P00067	New Program	Added	
P0008BP	New Program	Added	
P0008BP	Sequential Only Access Output Open Option Update Open Option Delete Open Option	Changed Changed Changed Changed	
P0008P	New Program	Added	
P0008P	Based On Member	Changed	
P0010P	New Program	Added	
P00111	New Program	Added	
P0012P	New Program	Added	
P0012P	Sequential Only Access Optimize Option	Changed Changed	
P00120	New Program	Added	
P00121	Based On Member Output Open Option Update Open Option	Changed Changed Changed	

## **Vocabulary Overrides Merge**

The Vocabulary Overrides file (F9220) lets you change the text information on J.D. Edwards screens and reports to reflect your own terminology or language. The Vocabulary Overrides merge updates the vocabulary override records in your production data library with current vocabulary override information in the PTF library.

The merge selects records in the Software Versions Repository Master file (F9801) that have function code DSPF, PRTF, or PRTS, and:

- Adds vocabulary override records for new Display/Printer files
- Changes Line 24 error text and messages, and default screen titles
- Adds new fields to existing vocabulary override records if they have prefix VTX
- Deletes VTX fields that are not delivered in the JDFDATA library.

NOTE: If you have added VTX fields to a video or report with the standard J.D. Edwards name, you could lose VTX fields.

- Updates fields in existing vocabulary override records with new text if the override flags for the fields are either blank or J
- Replaces all function key definitions

In final mode, the merge does not update VTX fields that have a Y in the override field. If changes exist for these fields, you will find them documented in the Vocabulary Overrides Merge report (R98721) you create when you run this merge.

### NOTES:

- The Data Dictionary/Vocabulary Overrides/DREAM Writer Rebuild job could replace the text descriptions again with your company-specific text.
- The Vocabulary Overrides merge totally replaces the function key translation files (F9601 and F9611). If these files contain your own custom information, you must enter the information again after the merge completes.

## **Vocabulary Overrides Merge Reports**

The Vocabulary Overrides merge produces two reports. The first Vocabulary Overrides Changed Report (R987212) lists the vocabulary overrides that were changed in your production data library. It shows the following updates.

- New text descriptions for VTX fields
- Overrides added
- VTX fields deleted
- New VTX fields or new screens

## Merges and Control Files (PTFs Only)

This report is provided for your information only. An example of the report appears below.

987212	J.D. Edwards & Company Vocabulary Overrides Merge Vocabulary Overrides Changed Report			Page - 1 Date - 2/05/96 From Libr - A73PC00001 To Libr - COMMON Mode - Final
<u>Object Nam</u>	<u>Field Name</u>	<u>Old Text Description</u>	<u>New Text Description</u>	<u>Change Description</u>
R00067	R00067	Data Dictionary Date Verificat		New Video/Report
R0004P	VTX004	INSTALL	Ins	New Text Description
R0004P	VTX005	Description	Description	New Text Description
R0004P	VTX006	Code	Code	New Text Description
R0004P	VTX010	(Y/N)	(Y/N)	New Text Description
R0004P	VTX012	User	Use	New Text Description
R0004P	VTX017		Sys	New VTX Field
R0005P	VTX004	INSTALL	Sys	New Text Description
R0005P	VTX011		Ins	New VTX Field
R0005P	VTX012		User	New VTX Field
R0006P	VTX009	Co	Comp	New Text Description
R00067		Alternate Description Report		New Video/Report
R0008BP	VTX002		P	New VTX Field
R0008BP	VTX005	Begin	Begin	New Text Description
R0008BP	VTX007		T	New VTX Field
R0008BP	VTX008		. . .Period Ending Dates/Centuries. . .	New VTX Field
R0008BP	VTX010	Year	Year	New Text Description
R0008BP	VTX011	02/14	02/11/20	New Text Description
R0008BP	VTX016	26/38/50	29/38/47	New Text Description
R0008BP	VTX017	03/15	03/12/21	New Text Description
R0008BP	VTX018	27/39/51	30/39/48	New Text Description
R0008BP	VTX019	04/16	04/13/22	New Text Description
R0008BP	VTX021	31/43	34/43/52	New Text Description
R0008BP	VTX022	25/37/49	28/37/46	New Text Description
R0008BP	VTX023	01/13	01/10/19	New Text Description
R0008BP	VTX024	28/40/52	31/40/49	New Text Description
R0008BP	VTX025	05/17	05/14/23	New Text Description
R0008BP	VTX026	29/41/53	32/41/50	New Text Description
R0008BP	VTX027	06/18	06/15/24	New Text Description
R0008BP	VTX028	30/42/54	33/42/51	New Text Description
R0008BP	VTX029	07/19	07/16/25	New Text Description
R0008BP	VTX030	08/20	08/17/26	New Text Description
R0008BP	VTX031	32/44	35/44/53	New Text Description
R0008BP	VTX032	09/21	09/18/27	New Text Description
R0008BP	VTX033	33/45	36/45/54	New Text Description
R0008BP	VTX006	Period		Deleted VTX Field
R0008BP	VTX020	End of		Deleted VTX Field
R0008BP	VTX034	10/22		Deleted VTX Field
R0008BP	VTX035	34/46		Deleted VTX Field
R0008BP	VTX036	11/23		Deleted VTX Field
R0008BP	VTX037	35/47		Deleted VTX Field
R0008BP	VTX038	12/24		Deleted VTX Field
R0008BP	VTX039	36/48		Deleted VTX Field
R0008P	VTX002		T	New VTX Field
R0008P	VTX005	Begin	Begin Fisc.	New Text Description
R0008P	VTX006	Per 01	Per 01	New Text Description
R0008P	VTX007	Per 02	Per 02	New Text Description
R0008P	VTX008	Per 03	Per 03	New Text Description
R0008P	VTX010	Year	Date/Cent.	New Text Description
R0008P	VTX011	Per 10	Per 10	New Text Description
R0008P	VTX012	Per 04	Per 04	New Text Description
R0008P	VTX014	Per 06	Per 06	New Text Description
R0008P	VTX015	Per 07	Per 07	New Text Description
R0008P	VTX016	Per 11	Per 11	New Text Description
R0008P	VTX017	Per 12	Per 12	New Text Description

The Vocabulary Overrides Not Changed Because of Overrides report (R98721) lists VTX fields in your production data library that have a Y in the override field and would have been affected by the merge if the override flags for those fields had been blank or J. The report compares text descriptions for VTX fields in your production data library (Old Text Description) and the PTF library. An example of the report appears below.

98721	J.D. Edwards & Company Vocabulary Overrides Merge Vocabulary Overrides Not Changed Because of Overrides			Page - 1 Date - 2/05/96 From Libr - A73PC00001 To Libr - COMMON Mode - Final																																																																																										
	<table><thead><tr><th>Video Name</th><th>Field Name</th><th>Old Text Description</th><th>New Text Description</th></tr></thead><tbody><tr><td>V06932</td><td>VTX003</td><td>Pay</td><td>Pay</td></tr><tr><td>V06932</td><td>VTX006</td><td>Pay</td><td>Pay</td></tr><tr><td>V08320</td><td>VTX002</td><td>Elig. Table 1. . . . .</td><td>Init Elig Table. . . . .</td></tr><tr><td>V08320</td><td>VTX009</td><td>Dep/Ben (Y/N). . . . .</td><td>Depend/Benef (Y/N). . . . .</td></tr><tr><td>V08320</td><td>VTX020</td><td>Elig. Table 2. . . . .</td><td>Cont Elig Table. . . . .</td></tr><tr><td>V08320</td><td>VTX021</td><td>Enter Amt/Rate (Y/N) ..</td><td>Enter Amt/Rt (Y/N) ..</td></tr><tr><td>V08320</td><td>VTX032</td><td>Flex Amt (Y/N) . . . . .</td><td>Flex Amount (Y/N) . . . . .</td></tr><tr><td>V08390</td><td>VTX011</td><td>Minimum Service. . . . .</td><td>Comp Period</td></tr><tr><td>V08390</td><td>VTX012</td><td>Basis (Y,M,D). . . . .</td><td>Eligible Enrollment:</td></tr><tr><td>V08390</td><td>VTX013</td><td>Or</td><td>Ineligible Enrollment:</td></tr><tr><td>V08390</td><td>VTX014</td><td>Program 1. . . . .</td><td>Status . . . . .</td></tr><tr><td>V08390</td><td>VTX015</td><td>Program 2. . . . . ined 2</td><td>Date Code. . . . .</td></tr><tr><td>V08520</td><td>VTX007</td><td>Begin Plan Year M/D. . . . .</td><td>Begin Year (MM/DD) . . . . .</td></tr><tr><td>V08520</td><td>VTX008</td><td>Depend/Benefic . . . . .</td><td>Depend/Benefic Y/N . . . . .</td></tr><tr><td>V12214</td><td>VTX020</td><td>Depr Meth:</td><td>Dep Meth:</td></tr><tr><td>V3003</td><td>VTX016</td><td>Crew Size. . . . .</td><td>Crew</td></tr><tr><td>V3003</td><td>VTX026</td><td>P.O. (Y/N) . . . . .</td><td>PO (Y/N) . . . . .</td></tr><tr><td>V3003</td><td>VTX029</td><td>Pay Point</td><td>Pay Point. . .</td></tr><tr><td>V42025</td><td>VTX024</td><td>Sufix.</td><td>Suffix</td></tr><tr><td>V42025</td><td>VTX025</td><td>Cust PO. .</td><td>Branch/Plant. .</td></tr><tr><td>V42060</td><td>VTX032</td><td>Doc. Type</td><td>Order Type . . . . .</td></tr><tr><td>V42060</td><td>VTX042</td><td>Brn/Plt . . . . .</td><td>Brn/Plt. . . . .</td></tr></tbody></table>	Video Name	Field Name	Old Text Description	New Text Description	V06932	VTX003	Pay	Pay	V06932	VTX006	Pay	Pay	V08320	VTX002	Elig. Table 1. . . . .	Init Elig Table. . . . .	V08320	VTX009	Dep/Ben (Y/N). . . . .	Depend/Benef (Y/N). . . . .	V08320	VTX020	Elig. Table 2. . . . .	Cont Elig Table. . . . .	V08320	VTX021	Enter Amt/Rate (Y/N) ..	Enter Amt/Rt (Y/N) ..	V08320	VTX032	Flex Amt (Y/N) . . . . .	Flex Amount (Y/N) . . . . .	V08390	VTX011	Minimum Service. . . . .	Comp Period	V08390	VTX012	Basis (Y,M,D). . . . .	Eligible Enrollment:	V08390	VTX013	Or	Ineligible Enrollment:	V08390	VTX014	Program 1. . . . .	Status . . . . .	V08390	VTX015	Program 2. . . . . ined 2	Date Code. . . . .	V08520	VTX007	Begin Plan Year M/D. . . . .	Begin Year (MM/DD) . . . . .	V08520	VTX008	Depend/Benefic . . . . .	Depend/Benefic Y/N . . . . .	V12214	VTX020	Depr Meth:	Dep Meth:	V3003	VTX016	Crew Size. . . . .	Crew	V3003	VTX026	P.O. (Y/N) . . . . .	PO (Y/N) . . . . .	V3003	VTX029	Pay Point	Pay Point. . .	V42025	VTX024	Sufix.	Suffix	V42025	VTX025	Cust PO. .	Branch/Plant. .	V42060	VTX032	Doc. Type	Order Type . . . . .	V42060	VTX042	Brn/Plt . . . . .	Brn/Plt. . . . .	
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V42060	VTX042	Brn/Plt . . . . .	Brn/Plt. . . . .																																																																																											

## User Defined Codes Merge

The User Defined Codes files (F0004 and F0005) let you define codes, relate them to code descriptions, and assign values for certain fields. The User Defined Codes merge updates some user defined codes in your production data library with current user defined code information contained in the PTF library.

The User Defined Codes merge:

- Adds new user defined code tables and their values for all system codes
- Adds new user defined code values for existing tables located in system codes 84 through 99 and in system code 00, record type IO
- Updates the user defined code detail text if requested

In final mode, the User Defined Codes merge does not add new values for existing tables located in system codes 01 through 83. In addition, it does not add new values for system code 00 except for record type IO. You must perform the application specific instructions to make these updates. To do these updates, see *Application Specific Instructions* in this publication.

## Merges and Control Files (PTFs Only)

### Transfer User Defined Codes Report

The Transfer User Defined Codes report (R98724) lists the user defined codes in your production data library that are affected by the merge. For each user defined code, the report indicates whether the code was added or replaced and shows the updated text descriptions, if any. An example of the report appears below.

98724				J.D. Edwards & Company			Date - 2/05/96		
				Transfer User Defined Codes			Page - 1		
							From - A73PC00001		
							To - COMMON		
Sys	Use	Record	Description 1	Description 2		JDE	Mrge	Merge	
		Code	Def Code			Ins	Type	Result	
00	AF		Address Format ID			1	RU	F0004	Added
	AF		01 Postal Code / City - No State					F0005	Added
	AF		02 City, State, Postal Separated					F0005	Added
	AF		03 City / Postal Code					F0005	Added
	AF		04 City / State / Postal One Line					F0005	Added
	AF		05 No Postal Code					F0005	Added
	AF		06 Postal / State / City One Line					F0005	Added
	AF		07 No State or Postal Code					F0005	Added
	AF		08 Postal / City / State One Line					F0005	Added
	AF		09 Postal Right Just. - Separate					F0005	Added
	AF		10 City / Postal Code - No State					F0005	Added
	AF		11 Postal Code / City on 2nd Line					F0005	Added
	AF		12 Postal Separate Line					F0005	Added
	AF		13 Postal Code First Line					F0005	Added
00	DF		Date Format			2		F0004	Added
	DF		Use System Value					F0005	Added
	DF		DMY Day, Month, Year (DDMMYY)					F0005	Added
	DF		MDY Month, Day, Year (MMDDYY)					F0005	Added
	DF		YMD Year, Month, Day (YYMMDD)					F0005	Added
00	IO		I/O Control Limit Exceeded			2		F0004	Not chgd
	IO	P03114	250					F0005	Added
	IO	P042003	250					F0005	Added
	IO	P1204	250					F0005	Added
00	NT		Nature of Transaction			2		F0004	Added
	NT		.					F0005	Added
	NT		10 Actual ownership change					F0005	Added
	NT		16 Credit for ownership change					F0005	Added
	NT		20 Returned goods and replacement					F0005	Added
	NT		30 Free of ownership change costs					F0005	Added
	NT		40 Goods processing for repairs					F0005	Added
	NT		50 Goods returned for repair					F0005	Added
	NT		60 Movement of goods for leasing					F0005	Added
	NT		70 Joint government production					F0005	Added
	NT		80 Building materials					F0005	Added
	NT		90 Other transactions					F0005	Added
00	SI		Subledger Inactive Code			2		F0004	Added
	SI		Active Subledger					F0005	Added
	SI		I Inactive Subledger					F0005	Added
00	TC		Condition of Transport			2		F0004	Added
	TC		.					F0005	Added
	TC		CIF Carriage, Insurance, Freight					F0005	Added
	TC		DDP Delivered Duty Paid					F0005	Added
	TC		DDU Delivered Duty Unpaid					F0005	Added
	TC		EXW Ex Works					F0005	Added
	TC		FOB Free on Board					F0005	Added
	TC		XXX Other					F0005	Added
00	TM		Mode of Transport			2		F0004	Added
	TM		.					F0005	Added

## Generic Text Application Key Files Merge

The Generic Text Application Key files (F00161 and F00162) contain the key fields that are used on generic text windows (program P0016) to access the generic text. For example, F14 (Memo) on the User Defined Codes screen accesses the User Defined Code Detail window (a generic text window), which displays descriptive text about a specific user defined code. The three key fields displayed at the top of the window are defined in the Generic Text Application Key files. The Generic Text Application Key Files merge updates the keys in your production data library with current key information in the PTF library. This merge does not produce a report.

## Menus Merge

The Menus merge:

- Produces a report that lists the menus added to your production data library during the upgrade process.
- Produces a report that compares the menus in your production data library with the menus in the PTF library. You must use this report to update your menus accordingly.
- Adds new menus to your production data library if you run it in final mode.

In final mode, the merge does not update menus that already exist on your system. The updates you should make to existing menus are documented in two areas: the Menu Comparison report (R98340) you create when you run this merge and the application specific instructions. You must create this report to update existing menus. To do these updates, see *Application Specific Instructions* in this publication.

### **Menu Comparison Reports**

The Menus merge produces two reports. The Menu Additions report (R983402) lists the menus that were added to your production data library. It is provided for your information only. An example of the report appears below.

983402	J.D. Edwards & Company	Page - . . . 1
	Menu Additions	Date - . . . 2/05/96
<hr/>		
TO Library - COMMON		
Menu Number	Menu Description	Changes
-----	-----	-----
G001	Other Systems	New Menu
G0015	Italian Legal Reports	New Menu
G0022	EC VAT Taxes	New Menu
G0438	Canadian Automated Payment Processing	New Menu
G0439	UK Automated Payment Processing	New Menu
G07A2241	Magnetic Media Processing Menu	New Menu
G07A227	SUI Magnetic Media - 2	New Menu
G07B2	Wage Attachment Processing	New Menu
G07H3	Retroactive Payroll Processing	New Menu
G08D4	Technical Position Operations	New Menu
G08F4	Technical Applicant Operations	New Menu
G08H15	Flexible Spending Accounts	New Menu
G08H16	COBRA Compliance	New Menu
G08H161	COBRA Election Coverage	New Menu
G08H17	Benefit Nondiscrimination Testing	New Menu
G08H32	Participant Setup	New Menu
G08H35	FSA Setup	New Menu
G08H36	COBRA Setup	New Menu
G08H37	Benefit Nondiscrimination Testing Setup	New Menu
G08H4	Technical Plan/Option Operations	New Menu
G08H45	Flexible Spending Accts - Advanced Ops	New Menu
G2	Energy Systems	New Menu
G2011	Production Property Set Up Menu	New Menu
G2012	Energy Property Reports	New Menu
G2013	Energy Cross-References	New Menu
G2016	Accounting Property Set Up	New Menu
G2017	AFE Master Menu	New Menu
G2021	Fixed Asset Billing (Energy)	New Menu
G2031	Energy System Constants	New Menu

## Merges and Control Files (PTFs Only)

The Menu Comparison Report (R98340) indicates with asterisks any differences between the menus in the PTF library and your production data library. The FROM Library Menu column contains menu information from the PTF library, and the TO Library Menu column contains menu information from your production data library.

The report indicates whether menu selections have been rearranged. In addition, it reports DREAM Writer versions that are missing in your production data library (an asterisk appears in the Difference column for Option Key and a detailed message appears in the TO Library Menu column). It only specifies changes that are necessary to the normal function of the menus. You must create this report because you use it later to complete your menu updates. An example of the report appears below.

98340	J.D. Edwards & Company Menu Comparison Report	Page - 1 Date - 2/05/96
*****		
Menu Number - G0021 Sales, Purchases & VAT Taxes		
FROM Library - A73PC00001	TO Library - CLTCOM	Mode - Final
*****		
Difference	A73PC00001	CLTCOM
-----	-----	VS -----
Menu Header		
-----	-----	-----
Advanced Ops . . . *G0033		*G003
Job to Execute .		
Menu Selection 02		Menu Selection 02
-----	-----	-----
Selection Desc . Tax Authorities		Tax Authorities
Job to Execute . J01051		J01051
Version. . . . . ZJDE0001		
*		
Menu Selection 03		Menu Selection 03
-----	-----	-----
Selection Desc . Tax Rate/Areas		Tax Rate/Areas
Job to Execute . J4008		J4008
*		
Version. . . . . ZJDE0001		

## Merges and Control Files (PTFs Only)

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```
98340                               J.D. Edwards & Company
                                         Menu Comparison Report
                                         Page - 101
                                         Date - 2/05/96
*****
                                         Menu Number - G1324
                                         Preventive Maintenance
FROM Library - A73PC00001      TO Library - COMMON      Mode - Final
*****
Difference          A73PC00001      COMMON
-----          ----- VS -----
Menu Header
-----
*   Menu Title . . .   Preventive Maintenance      Equipment/Plan Maintenance
Menu Selection 01
-----
*   Selection Desc .  P.M. SCHEDULING      PREVENTIVE MAINTENANCE
*   Job to Execute . .
Batch. . . . . 0      0
Highlight. . . . 0      0
Help Start Key .
Help End Key .
Option Code .
Option Key .
Version. . . .
Run Time Message
Menu Mask. . . .
Appl Override. .
Country/Res. . .

Menu Selection 05      Menu Selection 05
-----
*   Selection Desc .  PM Projection Batch Update
*   Job to Execute .  J13411
Batch. . . . . 0      0
Highlight. . . . 0      0
*   Help Start Key .  P13411
*   Help End Key . .  P13411
*   Option Code . . . 2
*   Option Key . . .  P13411
Version. . . .
Run Time Message
Menu Mask. . . .
*   Appl Override. .  13
Country/Reg. . .
```

## Help Instructions Merge

The Help Instructions merge replaces the help information in your production data library with current help information. It does not produce a report.

## Generic Message/Rates Merge

The Generic Message/Rates merge is similar to the User Defined Codes merge except that it includes the free form text associated with the rate on the message. The merge:

- Adds new user defined code tables and their values for all system codes
- Adds new user defined code values for existing tables located in system codes 84 through 99 and in system code 00, record type IO

In final mode, the Generic Message/Rates merge does not add new values for existing tables located in system codes 01 through 83. In addition, it does not add new values for system code 00 except for record type IO. You must perform the application specific instructions to make these updates.

NOTE: The User Defined Codes merge must complete successfully before you run this merge.

## Generic Rate/Message Update Report

The Generic Rate/Message Update report (R98725) lists all table and code updates, including messages and rates. An example of the report appears below.

98725	J.D. Edwards & Company Generic Message/Rates Update				Date - 2/05/96 Page - 1 From - A73PC00001 To - PRODDATA
Inst	User	User	Description	Description	Current Rate
Code	Code	Def Code			New Rate/Msg Type
32	EM		Editing Messages		
32	EM	2A	Editing Message		New Rate/Msg Value
			1.00 This is an example of an editing message used for 2.00 configurator processing. 4.00 5.00 If the Bore is greater than 2" (50.8), than the cylinder 6.00 should be double roded.		
32	SN		Standard Text		New Rate/Msg Type
32	SN	1001	General Assembly Procedure		New Rate/Msg Value
			12.00 This is an example of creating a general assembly procedure 13.00 that could print out for many parts and processes having to 14.00 enter it into the system only once. 16.00 17.00 Assemble Component Electrical Harness per the drawing and 18.00 schematic included with the shop packet. 19.00 20.00 Connect all the hydraulic connections as shown on special 21.00 attachment sheet HDR-XXXX. (XXXX refers to the part number).		
32	SN	1002	Quality Control General Proc		New Rate/Msg Value
			1.00 ***** 2.00 QUALITY IS JOB ONE!!!!!! 3.00 ***** 4.00 1. Retrieve Quality Control Checklist from Master File 5.00 and create duplicate copy for use as permanent file 6.00 of this procedure. 7.00 2. Setup necessary testing equipment. If this is a 8.00 destructive test step, ensure that Form 817 Quality 9.00 Scrapped is prepared and authorized. 10.00 3. Perform Quality Assurance Review as outlined on Document 11.00 obtained in step 1.		

### **Rebuild DD/VO/DW**

The Rebuild DD/VO/DW job updates the vocabulary override and DREAM Writer files with your company-specific text that is stored in the data dictionary.

The Rebuild DD/VO/DW job updates the vocabulary overrides fields with the row/column heading text specified in the data dictionary if the override flags for the fields are blank.

This job does not produce a report.

**NOTE:** The Data Dictionary and Vocabulary Override merges must complete successfully before you run this job.

### **Run Individual Merges**

The upgrade software lets you run the following merges separate from the main PTF installation process:

- Software Versions Repository
- Data Dictionary
- DREAM Writer
- Vocabulary Overrides
- User Defined Codes
- Generic Text Application Keys
- Menus
- Help Instructions
- Generic Message/Rates
- Data Dictionary/Vocabulary Overrides/DREAM Writer Rebuild

Before you run a merge, you must set up an upgrade plan that specifies to run that merge only. This plan should be based on the upgrade plan you used for the main upgrade process.

**IMPORTANT:** You must run certain merges before you run others. These dependencies are listed below:

- Run the Software Versions Repository merge before you run any other merge.
- Run the Data Dictionary, DREAM Writer, and Vocabulary Overrides merges before you run the Rebuild DD/VO/DW job.
- Run the User Defined Codes merge before you run the Generic Message/Rates merge.

Perform the following procedures to set up an upgrade plan to run a single merge and to run the merge.

### Set Up the Merge Upgrade Plan

To run an individual merge, you must set up an upgrade plan to run that merge only. J.D. Edwards recommends you create a new upgrade plan by performing the following steps:

1. Sign on as JDEINSTAL.

The Software Upgrade Menu (A97IBM) appears.

2. Select Work with Upgrade Planner.

The Plan the Upgrade screen appears.

3. In the Action Code field, type I (Inquire).

4. In the Plan Name field, enter the name of the upgrade plan you used for the main upgrade process.

5. In the Action Code field, type A (Add).

6. In the Plan Name field, type a name for the new upgrade plan.

7. In the Description field, enter a description for this plan.

8. In the Action Code field, type I (Inquire).

9. In the Plan Name field, enter the name of the upgrade plan you added.

10. Press F5 to enter upgrade data.

11. From the Libraries for This Plan screen, press Enter.

The Systems to Install/Upgrade screen appears.

12. The Systems to Upgrade field is set to 1 for each system you have purchased. J.D. Edwards highly recommends that you do not change these values.

13. Press Enter.

The Merge Information screen appears.

14. In each of the merge fields on the left side of the screen (except for the merge you want to run), type 0 (No Merge).

15. In the field for the merge you want to run, type 2 (Final). If you want to run the Help merge, type 3 (Replace) in the Help Master Merge field.

NOTE: If you choose to run the Data Dictionary, DREAM Writer, or Vocabulary Overrides merge, you also must set the Data Dictionary/Vocabulary Override/DREAM Writer Rebuild mode to 2 (Final).

## **Merges and Control Files (PTFs Only)**

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16. After you verify your information, press Enter, and then press F3 (Exit).
17. Sign off.

### **Run the Merge**

To run the merge:

1. Sign on as a user who accesses the production library you want to update.
2. From the Merges menu (G97R41), select Standalone Merges.  
A processing options screen appears.
3. In the first processing option field, type the name of the upgrade plan that is set up to run the specific merge.
4. In the second processing option field, enter the name of the PTF library (for instance, A73PC00001). Do not use \*NONE.

The merge submits to batch.

# Application Specific Instructions

After the upgrade process completes the main control file merges and the application control file conversions, you are ready to apply the application specific instructions (ASIs). These instructions, which were previously called post-installation, application-specific procedures, specify the updates you must make manually to your control files because the merges did not handle them. This chapter describes the ASI procedures you perform to update those aspects of the control files that were not updated by the merges.

NOTE: J.D. Edwards recommends you read all information in this chapter before you apply the ASIs.

## About the ASIs

J.D. Edwards has significantly improved and simplified the procedures you follow to make updates to your applications that are not handled automatically by the merges. These updates are reserved for you to make because J.D. Edwards protects any information you may have customized in your production environments.

You apply the ASIs by performing five general steps.

- Access the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF)
- Create the ASI Report
- Print the ASIs

NOTE: You can also print the ASIs from the Software Upgrade Menu (A97IBM) before you begin the upgrade process.

- Display a list of ASIs on the Work With Instructions (ASIs) screen
- Apply the ASIs to your production library

During the automatic portion of the upgrade process, you will receive the message *You may now sign on using your JDE User Profile to continue*. The upgrade process sends this message when the main control file merges and the application control file conversions complete. You can apply the ASIs at this time.

**IMPORTANT:** Do not begin to apply ASIs until you receive this message.

## **Application Specific Instructions**

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### **Access the Post Upgrade Menu or PTF Post Upgrade Menu**

These menus include selections for ASI procedures. To access these menus:

1. Sign on as a user who accesses the production library you want to update.
2. From any J.D. Edwards menu, enter G97R4 (for reinstallations) or G97PTF (for PTFs).

### **Print the ASIs**

The Application Specific Instructions (ASI) report (R98490) lists all of the ASIs for the applications you have on your machine. You will use the printed report later in this chapter to update your application systems.

The report sequences the ASIs by:

- Release Level (for example, A73)
- Reporting System Code
- ASI Type (for example, AA, DW, MN, and so on)

Because the report is produced through a DREAM Writer version, you can resequence the report by modifying a copy of this version.

To create the report:

1. Select Create ASI Report from the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF).
2. After you read the message screen that appears, press F6.

The DREAM Writer data selection screen for Print Instructions (ASIs) appears.

3. Make sure that the value is set to the correct release level (for example, A73) for reinstallations or the correct PTF level (for example, A73PC00001). If you are upgrading your software from release level A7.1, you must create separate reports for release levels A7.2 and A7.3. If you are upgrading from A6.2, you must create reports for A7.1, A7.2, and A7.3. If you are upgrading from A5.2, you must create reports for A6.1, A6.2, A7.1, A7.2, and A7.3.

After you press Enter, the report job submits to batch for processing.

To print the report:

1. Select Print ASIs & Special Job Rpt from the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF).

NOTE: If you did not create the Special Jobs Report (R97454) from the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF), then this selection will list only the ASI Report (R98490).

## **Application Specific Instructions**

2. Print the ASI Report (R98490).

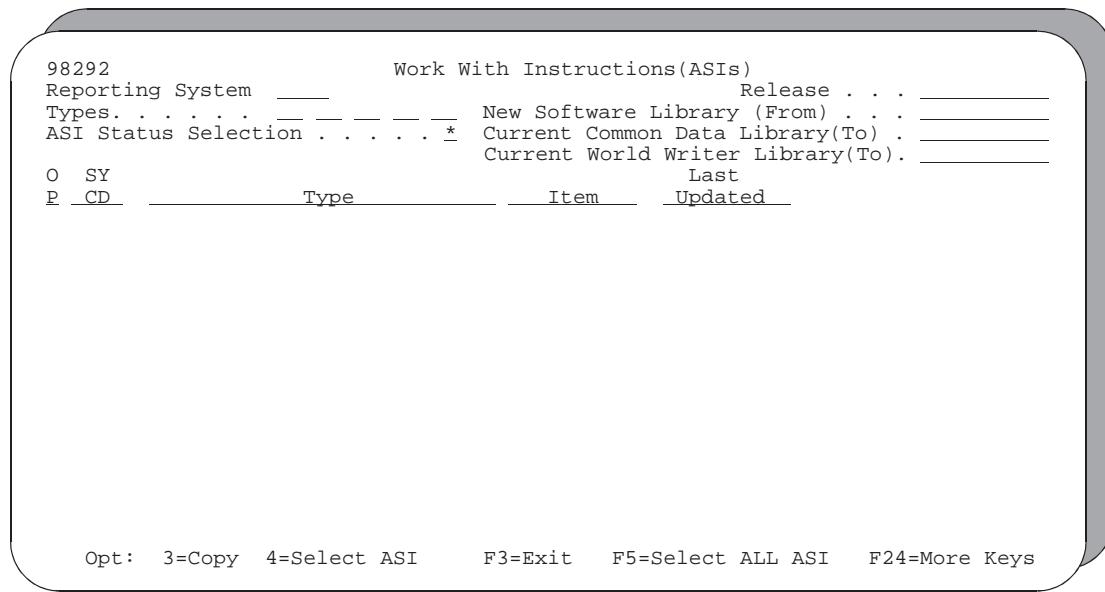
An example of the report appears below.

98490	J.D. Edwards & Company	Page Number	3
General Back Office	Application Specific Instructions Report	Date	2/05/96
	Instructions by System		
UD	Release. . . . . A73		
06IT	Reporting System . 07		
	Priority . . . . . 1 Payroll		
<b>User Defined Codes</b>			
Install System Code: 06	User Defined Code Type: IT		
	Transaction Integrity Errors		
	Procedure: Change		
Reason: The description for error code 0102 was changed to refer to PDBA Code instead of Pay Type.			
From the General User Defined Codes screen (P00051), change the following Character code.			
CHAR.	DESCRIPTION	DESCRIPTION-2	
CODE			
0102	PDBA Code does not exist		
.	.	.	.
.	.	.	.
.	.	.	.
.	.	.	.
.	.	.	.
.	.	.	.
<hr/>			
DW	Release. . . . . A73		
P0005A	Reporting System . 41B		
	Priority . . . . . 1 Bulk Inventory Management		
<b>DREAM Writers</b>			
Form ID: P0005A	Version Number: ZJDE4902		
	Procedure: Change		
Reason: System code was changed from 4150 to 41B.			
From the Processing Options Revisions screen:			
PROCESSING OPTION NUMBER	NEW VALUE		
1	41B		

## **Application Specific Instructions**

### **Work With Instructions (ASIs)**

You can display detailed ASI information and apply the ASIs to your production libraries by using the Work With Instructions (ASIs) screen. To access this screen, select Work With Instructions (ASIs) from the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF). After you read the message screen that appears, press F6. The Work With Instructions (ASIs) screen appears as shown below.



The following table explains the fields on the Work With Instructions (ASIs) screen.

FIELD	EXPLANATION
Reporting System	The code for the application system you want to list ASIs for. If you want to list all ASIs related to the applications you have on your machine, leave this field blank.
Release	The software release level, such as A73, you want to list ASIs for.
Types	The types of ASIs you want to list (up to five). Valid types include:  AA      Automatic Accounting Instructions DW      DREAM Writer UD      User Defined Codes WW      World Writer  To list all ASIs, leave these fields blank.
New Software Library (From)	The name of the reinstallation library (usually JDFDATA) or the PTF library that contains the information by which you will update your production libraries.

## **Application Specific Instructions**

FIELD	EXPLANATION								
ASI Status Selection	<p>A selection code that lets you list ASIs according to status. Valid codes are:</p> <table style="margin-left: 40px;"> <tr> <td>X</td><td>List ASIs that have been applied.</td></tr> <tr> <td>blank</td><td>List ASIs that have not been applied.</td></tr> <tr> <td>*</td><td>List all ASIs, regardless of status.</td></tr> <tr> <td>1</td><td>For future use.</td></tr> </table>	X	List ASIs that have been applied.	blank	List ASIs that have not been applied.	*	List all ASIs, regardless of status.	1	For future use.
X	List ASIs that have been applied.								
blank	List ASIs that have not been applied.								
*	List all ASIs, regardless of status.								
1	For future use.								
Current Common Data Library (To)	The name of the common library that contains the files you want to update, such as the DREAM Writer file (F98301). If you do not have a common library, you should specify the production library that contains the F98301 file.								
Current World Writer Library (To)	The name of the production data library that contains the World Writer file (F82100) you want to update. If you are not updating World Writer, you can leave this field blank.								
OP (Option)	If you specify a 3 in this field, the item referred to by the ASI is copied from JDFDATA (for reinstallations) or the PTF library to your production library without displaying the ASI detail. You cannot copy automatic accounting instructions (AAIs), or next numbers. Some ASI types, such as DW, require additional information before you can copy it. If you specify a 4, the ASI is selected for detailed display. If you leave this field blank, the ASI is not displayed.								
SY CD (System Code)	The code that identifies the application system the item is assigned to. This code can have up to four digits.								
Type	The type of ASI, such as user defined codes, next numbers, and so on.								
Item	<p>The identifying name of the particular item the ASI affects. The following items are examples of each type.</p> <table style="margin-left: 40px;"> <tr> <td>GLG6</td><td>Automatic accounting instruction (AAI) item number</td></tr> <tr> <td>P98330</td><td>DREAM Writer form ID</td></tr> <tr> <td>98SY</td><td>User defined code system and record type</td></tr> <tr> <td>Q01</td><td>World Writer group ID</td></tr> </table>	GLG6	Automatic accounting instruction (AAI) item number	P98330	DREAM Writer form ID	98SY	User defined code system and record type	Q01	World Writer group ID
GLG6	Automatic accounting instruction (AAI) item number								
P98330	DREAM Writer form ID								
98SY	User defined code system and record type								
Q01	World Writer group ID								
Last Updated	The last library location where the ASI was applied.								

### **Display a List of ASIs (Default Sequence)**

The Work With Instructions (ASIs) screen lets you display the ASIs that apply to your production environment. The screen displays the ASIs in the same sequence as the ASI report if you accept the default sequences for both of them.

To display the ASIs according to the default sequencing:

1. Type the release level, such as A73, in the Release field for which you want ASIs displayed.
2. Type the name of JDFDATA (for reinstallations) or the PTF library in the New Software Library (From) field.
3. Type the name of the common or production library you want to update in the Current Common Data Library (To) field.
4. If you need to update World Writer, type the name of the production library that contains the World Writer file you want to update in the Current World Writer Library (To) field.
5. Press Enter.

### **Display a List of ASIs (Custom Sequence)**

To display the ASIs in a customized sequence:

1. Type a system code in the Reporting System field if you want to display ASIs for a specific application system only.
2. Type a release level, such as A73, in the Release field if you want to display ASIs for a specific release level only.
3. Type up to five ASI types in the Types field if you want to display only some of the available ASIs.
4. Type the name of JDFDATA (for reinstallations) or the PTF library in the New Software Library (From) field.
5. Type a selection code in the ASI Status Selection field.
6. Type the name of the common or production library you want to update in the Current Common Data Library (To) field.
7. Press Enter.

## Apply the ASIs

You can approach applying ASIs in one of three ways.

- Copy selected items from JDFDATA (for reinstallations) or the PTF library to your production library without displaying the ASI detail. This method, which can save you time, is described under *Copy Selected Items Without Displaying ASI Detail* in this chapter. J.D. Edwards recommends you use this method only if you are an experienced installer with few customization concerns.
- Select individual ASIs for detailed display. Use this method when you want to examine the detail of individual ASIs before you apply them (manually or by automatic copy). This method is described under *Display Detailed ASI Information* in this chapter. Applying the ASIs is described under *Apply the ASIs After Displaying Detail*.
- Select all ASIs for detailed display. Use this shortcut method when you want to examine the detail of all ASIs before you apply them (manually or by automatic copy). This method is described under *Display Detailed ASI Information* in this chapter. Applying the ASIs is described under *Apply the ASIs After Displaying Detail*.

### Copy Selected Items Without Displaying ASI Detail

If you have few customization concerns, you can copy an entire item referred to by an ASI from JDFDATA (for reinstallations) or the PTF library to your production library without displaying the ASI detail. This procedure will save you valuable time while applying the ASIs to your environment.

1. Read the detailed information printed on the Application Specific Instructions (ASI) report (R98490) to identify those ASIs you know you can copy safely (little or no customization).

NOTE: The copy function does not work for automatic accounting instructions (AAIs) or next numbers, so do not select them for copying.

2. From the Work With Instructions (ASIs) screen, type 3 (Copy) in the OP (Option) field next to the ASIs you identified to copy.

NOTE: You can specify options 3 (Copy) and 4 (Select ASI) in a mixed way on the Work With Instructions (ASIs) screen, which could save you even more time. For more information about option 4 (Select ASI), see *Display Detailed ASI Information* in this chapter.

3. Press Enter. ASIs you selected with option 3 (Copy) will be copied automatically. Some ASI types require you to provide additional information before copying can proceed.

### Display Detailed ASI Information

You can select either all ASIs or specific ASIs for full display from the Work With Instructions (ASIs) screen.

1. If you want to select all ASIs, press F5 (Select ALL ASI). If you want to select specific ASIs, type 4 (Select ASI) in the OP (Option) field next to the ASIs you want to display.
2. Press Enter. The detailed information for the first selected ASI appears.

NOTE: Each time you press Enter, the next ASI's detailed information appears. This occurs until you have displayed the last selected ASI. If you want to stop displaying selected ASIs, press F3 (Exit).

Typically, the detailed information for an ASI includes:

- A list of field names associated with an item and affected by the update
- The values as they should appear in those fields

You will update the item in your production library to reflect these values. An example of an ASI's detailed information follows.

<p>The user defined code item, which is identified by install system code and type</p>	<p>98291 ASI Inquiry/Update A73</p> <p>Ty / Item. . . . . UD / 06IT Priority . . . . . 1</p> <p>User Defined Codes</p> <p>Install System Code: <input type="text" value="06"/> User Defined Code Type: <input type="text" value="IT"/> Transaction Integrity Errors Procedure: Change</p> <p>Reason: The description for error code 0102 was changed to refer to PDBA Code instead of Pay Type.</p> <p>From the General User Defined Codes screen (P00051), change the following Character code.</p> <table border="1"><thead><tr><th>CHAR. CODE</th><th>DESCRIPTION</th><th>DESCRIPTION-2</th></tr></thead><tbody><tr><td><input type="text" value="0102"/></td><td><input type="text" value="PDBA Code does not exist"/></td><td></td></tr></tbody></table> <p>Enter=Go to Next ASI F6=Copy New to Prod F10=Chg Prod F11=View New F24=More</p>	CHAR. CODE	DESCRIPTION	DESCRIPTION-2	<input type="text" value="0102"/>	<input type="text" value="PDBA Code does not exist"/>	
CHAR. CODE	DESCRIPTION	DESCRIPTION-2					
<input type="text" value="0102"/>	<input type="text" value="PDBA Code does not exist"/>						

The first and second description text you are changing for the character code as they should appear on the General User Defined Codes screen

## Apply the ASIs After Displaying Detail

After you display the detailed ASI information for an item, you can apply the update information to the item in your production library in one of two ways.

- Copy the entire item from JDFDATA library (for reinstallations) or the PTF library to your production data library.
- Manually type the update information, which is listed in the detailed ASI information on your screen or on your ASI report (R98490), on the update screen appropriate for the item.

To copy the entire item to your production data library:

1. Press F6 (Copy New to Prod) while the detailed ASI information for the item you want to update is displayed. The Record Transfer screen appears.

NOTE: If you are not sure whether you have customized an item, you can press F11 (View New) to display the item as it appears in JDFDATA or the PTF library. Compare this item with the same item in your production library.

2. Verify the name of the J.D. Edwards data library (PTF library or JDFDATA for reinstallations) in the From Library field.
3. Verify the name of the library in the To Library field. This library should contain the item associated with the ASI.
4. Verify the item name that appears, such as user defined code 98/SY in the User Defined Codes Sys and Type fields. You need to provide additional information for DREAM Writer and World Writer items.
5. Press Enter.
6. If you selected more than one ASI, press Enter to display the detailed ASI information for the next item.

To manually update the item:

1. Press F10 (Chg Prod) while the detailed ASI information for the item you want to update is displayed. The appropriate update screen for the item appears.
2. Update the item information. This publication assumes you know how to use these screens to update the items.
3. After you verify the information you changed, press Enter.
4. Press F3 (Exit) to return to the detail screen for the ASI you applied.
5. If you selected more than one ASI, press Enter to display the detailed ASI information for the next item.

### **Run Additional Jobs**

After you complete the ASIs, you must run some additional jobs from the Post Upgrade Menu (G97R4) for reinstallations or the PTF Post Upgrade Menu (G97PTF) for PTFs. You must run the jobs in the order given below.

- Build New Files List
- Create New Files
- Rebuild Menu Word Search
- Run Special Application Jobs

For more information about running these jobs, refer to *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook* or the *PTF Install Workbook*.

# Optional Procedures

After you complete the upgrade process and perform the ASIs, you can perform the following optional procedures:

- Rebuild the Disk Catalog. This creates the Video Disk Catalog file (F98990). The file catalogs all libraries on your system.
- Rebuild the Cross-Reference Index. This updates the information you need in order to use the cross-reference search facility and the menu flow chart facility.
- Create the Optional File Report. This report lists all files that are identified as optional. Based on the file description, you can choose to delete the file from your environment, which makes more space available on your machine.

NOTE: You do not need to perform these procedures in order to run your J.D. Edwards software normally. You can perform them sometime after you perform the upgrade procedures.

## Rebuild the Disk Catalog

The Rebuild Disk Catalog procedure creates the Video Disk Catalog file (F98990). When you run this program, all libraries on your system are cataloged in this file. You should run this job in batch, which will take between four and six hours to complete depending on the number of objects and libraries you have.

### Submit the Job

To rebuild the disk catalog:

1. Sign on as JDE.
2. Select Disk Catalog from the Rebuilds & Global Updates menu (G9642).
3. After you read the message screen that appears, press F6. The Rebuilds & Global Updates menu reappears and the Video Disk Catalog file is then built in JDFDATA.

## Rebuild the Cross-Reference Index

The Rebuild Cross-Reference Index procedure updates the information you need in order to use the cross-reference search facility and the menu flow chart facility.

NOTE: Before you submit the Rebuild Cross-Reference Index job, you must be sure the F98001, F98002, and F98003 files exist on your system.

It will require significant time to run the job against all systems (estimate 8 to 14 hours). However, after you initially do this, you can maintain the index by updating certain parts of it (significantly less run time). You must have the J.D. Edwards source library (JDFSRC) on your machine to run this job.

### Submit the Job

To rebuild the cross-reference index globally for all systems:

1. Sign on to the production environment you want to run the job against.
2. Select Cross-Ref Index from the Rebuilds & Global Updates menu (G9642).
3. After you read the message screen that appears, press F6. The versions list for the Cross-Ref Index form ID appears.
4. Type 1 (Run) in the O (Option) field next to version XJDE0001 (Build Cross-Reference – All Systems).

To rebuild the cross-reference index partially (for a specific system, program, video, or file):

1. Sign on to the production environment you want to run the job against.
2. Select Cross-Ref Index from the Rebuilds & Global Updates menu (G9642).
3. After you read the message screen that appears, press F6. The versions list for the Cross-Ref Index form ID appears.
4. Type 3 in the O (Option) field next to one of the following versions:

<u>Version</u>	<u>Description</u>
XJDE0002	Build Cross-Reference – One System
XJDE0003	Build Cross-Reference – One Program
XJDE0004	Build Cross-Reference – One Video
XJDE0005	Build Cross-Reference – One File

5. Press Enter until the Processing Options Revisions screen appears.
6. Enter Y in the third processing options field if you want to include any programs called by another program being updated in the index. The Data Selection screen appears.

7. Use the Member, Function Code, and/or Install System Code fields on the Data Selection screen to specify what objects to include in the rebuild job.
8. Press Enter until the Versions List screen appears again.
9. Type 1 (Run) in the O (Option) field next to the version you just created.

## Create the Optional File Report (R989760)

The Optional File Report (R989760) lists all files that are identified as optional. Based on the report information, you can make more disk space available by deleting any files that are not relevant to your environment. For example, if a particular file is required for foreign currency (system 11) but you do not have international transactions, you can delete the file by using the Optional Files Workbench. You can access the workbench from the Data Base Management menu (G9645).

### Run the Report

To run the Optional File Report:

1. Be sure you are signed on as JDE.
2. Select Optional Files Report from the Data Base Management menu (G9645). A processing options screen appears.
3. In the input fields, specify the name of each library you want to run the report against.
4. After you verify your selections, press Enter to run the report. An example of the report follows:

Data File Library. . TEST		
Member ID	Func Type	Member Description
<hr/>		
F0006JA	LF	JF - BILLING ONLY - F0006/F0911 - Cost Center This logical is used in Service Billing. If you have installed Service Billing, this logical file is not optional.
F0006LC	LF	LF - JOB COST ONLY - Level of Detail, Cost Center This logical is used in Job Cost. This logical is used when searching for existing jobs using the Job Search by Level of Detail. If you have installed Job Cost, this file is not optional.
F0006LG	LF	LF - Job Cost Only - Company, Cat Cd 1-20, Cost Center This logical is used in Job Cost. This logical is used for validation of Project Number. If you have installed Job Cost, this logical file is not optional.

## **Optional Procedures**

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5. Notice that the first file in the sample list is used for Service Billing only. If the Service Billing system was not in your environment, you would want to delete this file. Delete the files that are not relevant to your environment by using the Optional Files Workbench. You can access the workbench from the Data Base Management menu (G9645).

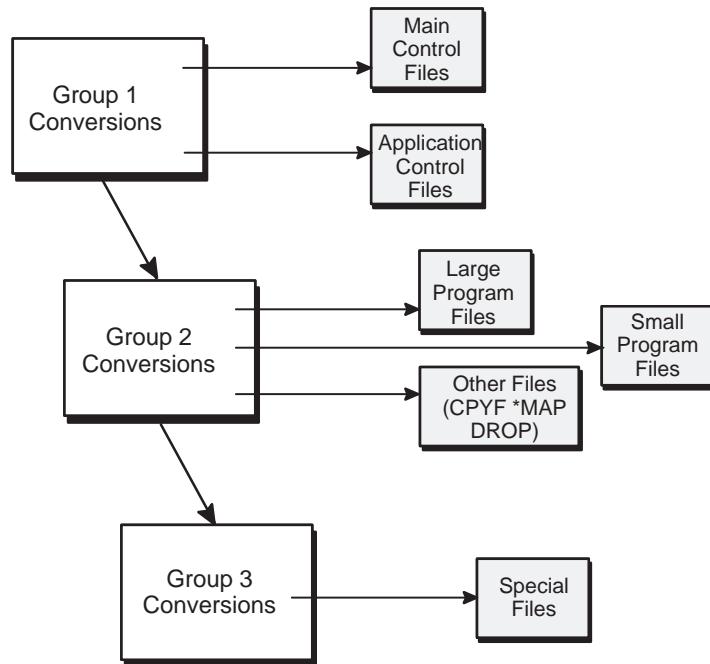
# File Conversion

This chapter describes the file conversions that occur during the upgrade process and the sequence in which they occur.

## Overview

Each file to be converted, except for “other files” and “special files,” is assigned a conversion type in the File Conversion Scheduler file (F97201). The file conversion type determines the conversion group to which the file belongs. A file’s group classification determines when the upgrade process will convert it. The following illustration shows how the various file conversion types are grouped.

## File Conversion Process Flow



Group 1 conversions include main control files (type CTF) and application control files (ACF). Group 2 conversions include large and small program files (BIG and LTL respectively), and other files that must be converted but are not assigned a conversion type in the File Conversion Scheduler file. Group 3 conversions include special files. The following sections describe each file conversion type and the order in which file conversions occur.

## Conversion Types

Each file that the upgrade process converts is classified according to file conversion type in the File Conversion Scheduler file, except for “other files” and “special files.” The file conversion types are described below. The type designation that is used in the scheduler is in parentheses.

### **Main Control Files (CTF)**

The main control files make up the basic overall structure of J.D. Edwards software. The application control files and files in groups 2 and 3 may depend on information in the main control files. Main control files include, for instance, the Software Versions Repository files (F9801 and F9802) and the DREAM Writer files (F98301, F98311, F98312, and F9831).

### **Application Control Files (ACF)**

The application control files are similar to the main control files but are specific to applications generally. They may depend on information in the main control files. Files in groups 2 and 3 may depend on information in the application control files. Application control files include, for instance, the Date Fiscal Patterns file (F0008) and the Company Constants file (F0010).

### **Large Program Files (BIG)**

The large program files are main data files, such as the Accounts Receivable Ledger file (F0311) and the Accounts Payable Ledger file (F0411). They may depend on file information in group 1. The large program files do not depend on information in any other file in group 2. Files in group 3 may depend on information in the large program files.

### **Small Program Files (LTL)**

The small program files are secondary data files, such as the Batch A/R Cash Application file (F0312) and the Bank Statement Detail file (F0917). They may depend on file information in group 1. The small program files do not depend on information in any other file in group 2. Files in group 3 may depend on information in the small program files.

### **Other Files**

Other files include those that must be converted but are not scheduled in the File Conversion Scheduler. These files are converted as follows:

1. Your files and corresponding data are copied from your production data library to a work library, and then they are deleted from the production data library.
2. The structures of the new files are copied from the J.D. Edwards data library (usually JDFDATA).
3. Your file data only, which was copied to the work library, is copied back to your production data library by using CPYF \*MAP \*DROP.

These files do not depend on information in any other file in group 2. Files in group 3 may depend on information in these files.

## Special Files

Special files have unique conversion characteristics that differentiate them from all other file conversion types. An example is distribution flex files, which you will convert when you run special application jobs in *Phase 4 – Create Files and Run Jobs* in the *Reinstallation Workbook*.

## Conversion Sequence

Each group of file conversions must process completely before the next group can start. For instance, group 1 files must finish before group 2 files begin. The conversion sequence of the various types of files is explained below according to group.

### Group 1 Conversions

The CTFs and ACFs convert automatically during the second step of the upgrade process. Each file converts one at a time beginning with the CTFs and then the ACFs. After all files in group 1 convert completely and the merges finish, you can begin to apply the application specific instructions (ASIs), which are explained in *Application Specific Instructions* in this publication. After group 1 conversions finish, group 2 conversions begin automatically.

### Group 2 Conversions

The BIG, LTL, and other files convert automatically during the second step of the upgrade process after group 1 conversions finish. These conversions run simultaneously. After group 2 conversions finish, you can run group 3 conversions from the Post Upgrade Menu (G97R4).

### Group 3 Conversions

You can run the special file conversions from the Post Upgrade Menu (G97R4).

**IMPORTANT:** Be sure to create any new files that appear on the New Files List Report (R97452) before you run the special jobs. For information about the report and creating the new files, refer to *Phase 4 – Create Files and Run Jobs* in the *Reinstallation Workbook*.

To run the special application jobs, refer to *Phase 4 – Create Files and Run Jobs* in the *Reinstallation Workbook*.

**File Conversion Scheduler Report**

This report (R97203) shows all the files that are scheduled to convert, except "other files." To create the report, select Print File Conversion Schedule from the Software Upgrade Menu (A97IBM). After you select to print the report, your screen will display a DREAM Writer versions list. Add a new version based on version ZJDE0001 and change the Data Selections screen so that Plan Name is equal to the appropriate plan name. Run this new version of the report. An example of the report appears below.

File Conv. Scheduler Report												Page Number	2	
												Date	. . . 2/05/96	
												Time	. . . 11:06:46	
Environment Name	Inst Syst	Object Name	Cnv Pro	Pgm Typ	Run Seq	Sbmt Type	Version Id	Upgrade Type	Cnv Type	From Level	Rel. Level	Files Used	St Cd	Run Date
TEST908	00	J001061	ACF	001	10	CALL	*NONE	*ALL	*PGM	A62	A73	F0010	--	--
TEST908	00	J000861	ACF	001	20	CALL	*NONE	*ALL	*PGM	A62	A73	F0008	--	--
TEST908	00	J031161	BIG	001	110	SBM	*NONE	*ALL	*PGM	A62	A73	F0311	--	--
TEST908	00	J041161	BIG	001	120	SBM	*NONE	*ALL	*PGM	A62	A73	F0411	--	--
TEST908	00	J4801AX	BIG	001	130	SBM	*NONE	*ALL	*PGM	A62	A73	F4801	--	--
TEST908	00	J090261	BIG	001	20	SBM	*NONE	*ALL	*PGM	A62	A73	F0902	--	--
TEST908	00	J091161	BIG	001	60	SBM	*NONE	*ALL	*PGM	A62	A73	F0911	--	--
TEST908	00	J0911Z161	BIG	001	80	SBM	*NONE	*ALL	*PGM	A62	A73	F0911Z1	--	--
TEST908	00	J002661	LTL	001	015	SBM	*NONE	*ALL	*PGM	A62	A73	F0026	--	--
TEST908	00	J000661	LTL	001	100	SBM	*NONE	*ALL	*PGM	A62	A73	F0006	--	--

# World Writer Conversion

This chapter explains how to analyze your World Writer versions to determine those that need to be converted for A7.3 use. It also describes how to convert World Writer versions that are able to be converted automatically, and how to examine the results of the analysis or conversion by using the conversion workbench.

**IMPORTANT:** Before you begin to use the conversion workbench, you must run the required special jobs for World Writer. To access the jobs, select Required for World Writer Conv from the A71-A71PC00007 Special Jobs menu (G97U07).

**NOTE:** If you previously upgraded to release level A7.1, do not perform the procedures in this chapter. You performed them previously when you upgraded to A7.1.

## World Writer Analysis

Follow this procedure to analyze your World Writer versions for conversion.

1. Select World Writer Analysis/Conv from the World Writer Conversion menu (G97R47). A processing options screen appears.

98312	World Writer Analysis/Conv	Form ID. . . . <u>P97493</u>
World Writer/DREAM Writer Conversion	Version. . . . <u>ZJDE0001</u>	Display Level. <u>4</u>
This job has various options described below. Enter the desired values and press ENTER to continue.		
PROCESSING MODE:		
Enter a "P" to process versions in Proof mode or a "U" to process versions in Update mode.		<u>P</u> _____
ERROR LOGGING:		
Enter a "1" to log only the first error or an "A" to log all errors.		<u>A</u> _____
FROM RELEASE:		
Enter the release from which the upgrade occurred (ex: A61).		<u>A71</u> _____ +
F5=Printer Overrides		

## World Writer Conversion

2. In the Processing Mode field, type U (for update mode) if you want to automatically convert versions that pass the analysis test. Type P (for proof mode) if you do not want to convert them at this time. To save time, you may want to submit the analysis in proof mode during the day, and then in update mode at night.

NOTE: You can convert the versions individually (manually or automatically) by using the conversion workbench.

3. When a version does not pass the analysis test, the reasons are written to an error log. In the Error Logging field, type 1 if you want to log only the first error for each version. Type A to log all errors.

NOTE: If you choose to log all errors, analysis will take slightly longer, but the complete error log would be helpful for manual conversion. J.D. Edwards recommends that you log all errors.

4. In the From Release field, type the release level you are upgrading from (for example, A71).
5. In the To Release field, enter A73. The job submits to batch.

You can view the results of the World Writer analysis by using the conversion workbench.

## Conversion Workbench

The conversion workbench lets you view the results of the World Writer analysis. The workbench lists World Writer versions that you must convert for A7.3 use. It indicates the versions you can convert automatically, and those you must convert manually because of errors.

To access the conversion workbench, select Conversion Workbench from the World Writer Conversion menu (G97R47). The Conversion Workbench screen appears.

97492		Conversion Workbench			
		WW: Form ID. . . . .			
		Analysis Status. . . . _ (' ' for all)			
Update Status. . . . * (* for all)					
O	Query	Version ID	Description	An	Up
P	Group			St	St
-	QTEST	ALISA		F	
-	QTEST	ADDBK	Address Book	R	C
-	QTEST	APCHECKS	A/P Check Register	F	M
-	QTEST	APCHECKS2	A/P Check Register	F	
-	QTEST	APDIST	A/P Vouchers w/ GL distribution	P	C
-	QTEST	APDIST2	A/P Checks w/ GL distribution	F	
-	QTEST	APLIST	A/P Listing	P	C
-	QTEST	ARLIST	A/R Listing	P	C
-	QTEST	ARLIST2	A/R Listing	P	C
-	QTEST	CREDIT	Credit Limit	P	C
-	QTEST	FILE	File Output	P	C
-	QTEST	INVLIST	Inventory Listing	R	C
-	QTEST	INVLIST2	Inventory Listing	R	C
-	QTEST	PAYMENTS	Payment Information	F	
-	QTEST	TOTALS	Totals Only Report	P	C
Opt: 1=File field exceptions 2=Convert 3=WW 9=Analyse F21= Print F24=More					

The following table explains the fields on the Conversion Workbench screen.

FIELD	EXPLANATION						
WW: Form ID	The query group for which you want to begin to list World Writer records. The list will begin with records for this query group and will continue with records for query groups that follow. To list all World Writer records, leave this field blank.						
Analysis Status (top part of screen)	<p>The analysis status code for which you want to list World Writer records. This code is assigned to each record by the World Writer analysis. Valid codes include:</p> <table> <tbody> <tr> <td data-bbox="802 1250 835 1262">F</td><td data-bbox="835 1250 1365 1262">List records that failed analysis</td></tr> <tr> <td data-bbox="802 1277 835 1292">P</td><td data-bbox="835 1277 1365 1292">List records that passed analysis</td></tr> <tr> <td data-bbox="802 1307 835 1322">R</td><td data-bbox="835 1307 1365 1322">List records that need post-analysis review</td></tr> </tbody> </table> <p data-bbox="760 1370 1365 1385">To list all World Writer records, leave this field blank.</p>	F	List records that failed analysis	P	List records that passed analysis	R	List records that need post-analysis review
F	List records that failed analysis						
P	List records that passed analysis						
R	List records that need post-analysis review						

## World Writer Conversion

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FIELD	EXPLANATION
Update Status (top part of screen)	The update status code for which you want to list World Writer records. This code indicates the current conversion status of a World Writer version. Valid codes include:  A List records that are being analyzed or converted currently C List records that have been converted automatically M List records that have been converted manually (may not mean that a change actually was made to the record) S List records that have been submitted for analysis/conversion, but are not active * List all records regardless of update status <i>blank</i> List records that need to be converted
OP (Option)	If you specify a 1 in this field (only applicable for records with analysis status of F), a Report File Conversion Window appears that lists the causes for the failure. For the descriptions of error codes, see <i>Error Explanations</i> in this chapter.  If you specify a 2 (only applicable for records with analysis status of P or R), the record submits for automatic conversion.  If you specify a 3, a versions list appears from which you can manually change a World Writer version.  If you specify a 9, the record submits for re-analysis.
Query Group	The query group for the World Writer version.
Version ID	The name of the World Writer version.
Description	The title of the World Writer version.

FIELD	EXPLANATION										
An St (Analysis Status)	<p>The status code assigned to each record by the World Writer analysis. Valid codes include:</p> <table> <tr> <td>F</td><td>Failed analysis (encountered errors)</td></tr> <tr> <td>P</td><td>Passed analysis (encountered no errors or warnings)</td></tr> <tr> <td>R</td><td>Needs post-analysis review (encountered warnings, but no errors)</td></tr> </table> <p>NOTE: If an analysis in update mode detects an error, the version is assigned an analysis status code of F and is not converted. If the analysis detects a warning but no errors, the version is assigned a status code of R. You can convert it automatically, but you should review the version for possible errors that you need to correct manually.</p>	F	Failed analysis (encountered errors)	P	Passed analysis (encountered no errors or warnings)	R	Needs post-analysis review (encountered warnings, but no errors)				
F	Failed analysis (encountered errors)										
P	Passed analysis (encountered no errors or warnings)										
R	Needs post-analysis review (encountered warnings, but no errors)										
Up St (Update Status)	<p>The code that indicates the current conversion status of a World Writer version. Valid codes include:</p> <table> <tr> <td>A</td><td>Job active</td></tr> <tr> <td>C</td><td>Automatic conversion completed</td></tr> <tr> <td>M</td><td>Manual conversion performed (may not mean that a change actually was made to the record)</td></tr> <tr> <td>S</td><td>Job submitted</td></tr> <tr> <td><i>blank</i></td><td>No changes have been made to the version</td></tr> </table>	A	Job active	C	Automatic conversion completed	M	Manual conversion performed (may not mean that a change actually was made to the record)	S	Job submitted	<i>blank</i>	No changes have been made to the version
A	Job active										
C	Automatic conversion completed										
M	Manual conversion performed (may not mean that a change actually was made to the record)										
S	Job submitted										
<i>blank</i>	No changes have been made to the version										

To print a list of all the records that match the selection criteria on this screen, press F21 (Print).

## Suggested Use

J.D. Edwards recommends that you analyze and convert your World Writer versions by following these procedures.

1. Perform the World Writer analysis in update mode and with error logging set to A (All). Records that are assigned an analysis status code of P or R are converted automatically, but records with a status code of F are not converted.
2. From the conversion workbench, display the warnings for World Writer versions that have an analysis status code of R (use option 1 on the Conversion Workbench screen).
3. After displaying the warnings, change the report writer versions if necessary (use option 3).
4. For World Writer versions that have an analysis status code of F, determine the causes of failure (use option 1).

## World Writer Conversion

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5. For the failed World Writer versions, manually correct the specific errors that appear in the error log (use option 3).
6. Resubmit the corrected version for analysis (use option 9).

NOTE: If the error explanation indicates that you must convert the version manually (see *Error Explanations*), do not perform this step and the one that follows.

7. If the corrected version passes the analysis, submit it for automatic conversion (use option 2).

NOTES:

- Instead of converting the corrected versions automatically, you can do so manually if it is more efficient.
- **IMPORTANT:** If you use option 3 next to a record on the Conversion Workbench screen, the update status will be changed to M whether you make a manual change or not. You still must convert those records that have not been updated.
- If a report converts, but produces unexpected results, examine the join file criteria, and the data selection and the sort/totaling specifications.

## Error Explanations

The following table explains the errors that could appear in the Report File Conversion Window.

NOTE: Errors stop the conversion process, but warnings do not.

ERROR AND EXPLANATION	ERROR/ WARNING
<b>Error text:</b> Too many records for calculation field.  <b>Explanation:</b> The maximum number of lines per field for calculation specifications (4) was exceeded in the original version. Correct the calculation specifications.	Error
<b>Error text:</b> New field name too long.  <b>Explanation:</b> The new field name for the converted presumptive join data item exceeds ten bytes. Delete this field from the output specifications because it cannot be used.	Error
<b>Error text:</b> Presumptive join item not found in D.D.  <b>Explanation:</b> This presumptive join data item is no longer supported in the data dictionary. Delete this field from the output specifications because it cannot be used.	Error

ERROR AND EXPLANATION	ERROR/ WARNING
<b>Error text:</b> File not specified in S.V.R.	Error
<b>Explanation:</b> One of the selected files is not in the software versions repository. You must convert this version manually.	
<b>Error text:</b> Cannot determine file join relationship.	Error
<b>Explanation:</b> A file must be added to support converted fields, but there is more than one way to join them. Specify the new file and the file join criteria in the version.	
<b>Error text:</b> ATTENTION: Obsolete date field deleted.	Warning
<b>Explanation:</b> This date field no longer exists because of the Julian date conversion. The field was automatically deleted from your version if you submitted the version for conversion.	
<b>Error text:</b> ATTENTION: Obsolete field deleted.	Warning
<b>Explanation:</b> This field no longer exists. The field was automatically deleted from your version if you submitted the version for conversion.	
<b>Error text:</b> Output field calc specs unconvertible.	Error
<b>Explanation:</b> A syntax error exists in your calculation specifications. Correct the error.	
<b>Error text:</b> WARNING: Field may be obsolete.	Warning
<b>Explanation:</b> A field was detected in your calculation specifications that did not require conversion. Verify that this field exists because it could be obsolete.	
<b>Error text:</b> WARNING: Review file join.	Warning
<b>Explanation:</b> Two files were joined by using a non-primary key. Verify that the join is correct.	
<b>Error text:</b> More than one option for field conversn.	Error
<b>Explanation:</b> The file that previously contained this field has been normalized into more than one file. This field has been exported to at least two different files. You must convert this version manually.	

## Error Log Reports

The error log reports provide you with the same warning and error information that appears in the Report File Conversion window. In addition, original field values are provided for warnings that are issued because an obsolete field was deleted.

To run an error log report:

1. Select Error Log Reports from the World Writer Conversion screen (G97R47). A version list appears.
2. You can use one of the versions of this report provided by J.D. Edwards, which let you list errors or warnings by user or query group, or you can create your own version. To run the report, enter 1 (Run) in the OP (Option) field next to the version you want to run.

# Install a New Application System

You can install new application systems separate from the normal installation process. However, J.D. Edwards assumes your J.D. Edwards software is at release level A7.3 currently.

You install new systems by performing the following general steps:

- Perform the LODRUN Command
- Set up an upgrade plan to install the new application systems only
- Start the installation
- Update the menus
- Create new files
- Review the installation reports

## Perform the LODRUN Command

You must load the new installation library (JDEINSTAL) from tape. To do this, perform the LODRUN procedure in *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*.

**IMPORTANT:** To load the new installation library, you must be signed on as QSECOFR.

### Set Up the Upgrade Plan

Before you install a new system, you must set up an upgrade plan that is designed to install the new system.

**MULTI-PLANS:** If you want to install the new system to multiple environments, you must set up an upgrade plan for each environment. Each environment must share the same J.D. Edwards object and data libraries (usually JDFOBJ and JDFDATA). You will use only one plan when you install the new system, but you will use all the plans when you create new files.

1. Sign on as JDEINSTAL. The Software Upgrade Menu (A97IBM) appears.
2. Select Work with Upgrade Planner. The Plan the Upgrade screen appears.
3. In the Action Code field, type I (Inquire).
4. In the Plan Name field, type the name of the upgrade plan you used to install or upgrade the environment in which you want the new system installed. Press Enter.
5. Press F5 to enter upgrade data.

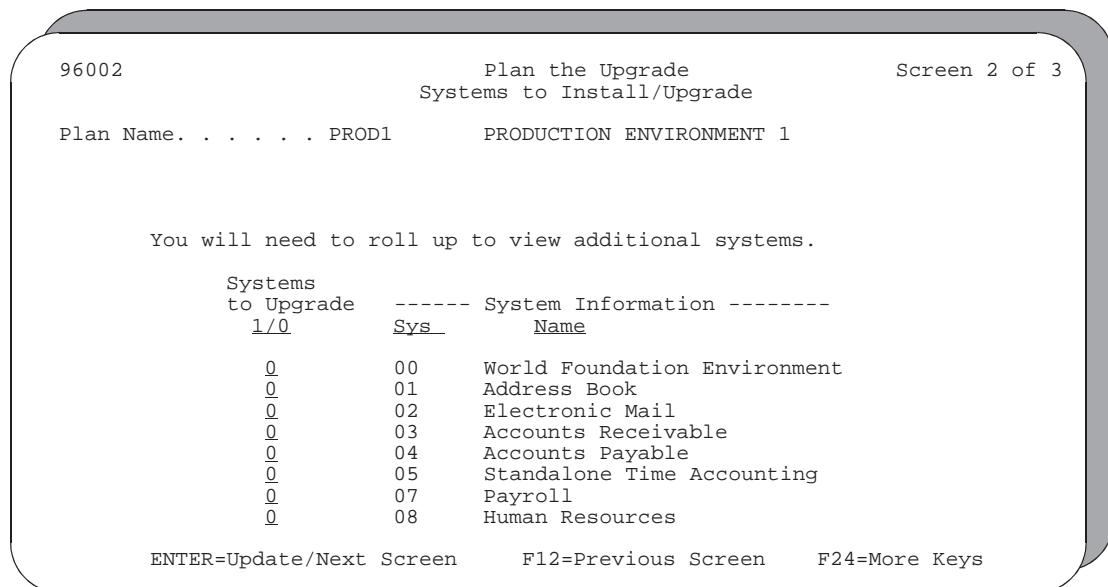
The Libraries for This Plan screen appears.

Lib	Library	Library
Typ	Name	Description
COM	CLTCOM	Client's Common Library
DTA	CLTDTA	Client's Data Library
SEC	CLTSEC	Client's Security Library
JDF	JDFDATA	JDE Data Library
OBJ	JDFOBJ	JDE Object Library
SRC	JDFSRC	JDE Source Library

6. Make sure the Current JDE Release Level field and the New JDE Release Level field are set to A73.
7. Choose whether to install object and data only, or source also.

8. If you make changes to this screen, press Enter twice. Otherwise, press Enter once.

The Systems to Install/Upgrade screen appears.



The Systems to Upgrade fields is set to 1 automatically for any new system that will be installed. If system 00 is set to 1, change it to 0 because you have installed it already.

NOTE: If you have purchased the InterTrans Logistics Transportation Management product or the Data Systems International WorldRF product, select the systems assigned to the product. The J.D. Edwards reinstallation process restores the libraries for these systems, but it does not perform the product installation. For product installation procedures, refer to the *Strategic Alliance Products Installation Workbook*.

9. Press Enter twice and then press F3 to exit the upgrade planner. It is not necessary to review or change the settings on the Merge Information screen or Advanced Options screen because the installation process does not use them.

## Install a New Application System

### Install the New System

After you have completed the upgrade plan, you are ready to start installing the new system.

1. The J.D. Edwards data library (usually JDFDATA) in your upgrade plan must contain at least the following files:

F0082	F0092	F0095
F00821	F0093	F9801
F0083	F0094	F9802

These files may not exist if you removed the J.D. Edwards data library or altered it. If any of these files do not exist in the library, you must restore them before continuing.

If the tape that contains the new system includes system 00, you can restore the F0082, F00821, F0083, F9801, and F9802 files from the COMFILE library on the tape. Restore the remaining files from the #JDFD00 library on the tape. If your tape does not include system 00, you must restore the files from your backup copy of the JDFDATA library.

2. Sign on as JDEINSTAL. The Software Upgrade Menu (A97IBM) appears.
3. Sign off all users. You must have exclusive access to all J.D. Edwards software.
4. Select Start the Upgrade. The JDE Upgrade Command (JDEUPGRADE) screen appears.

JDE Upgrade Command (JDEUPGRADE)

TYPE choices, press Enter.

Upgrade Type . . . . .	_____	*PTF, *INSTALL, *REINSTALL... From Upgrade Planner
Plan Name . . . . .	_____	+ for more values
Source Media . . . . .	_____	Tape Device Name, *DISK
Current JDE Release Level . . .	_____	From Upgrade Planner
New JDE Release Level . . . .	_____	From Upgrade Planner
Run Validator Program . . . .	1	1=Yes, 0=No
Hold Install Job on Job Queue .	0	1=Hold on JOBQ, 0=Do not hold

Bottom  
F3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use this display  
F24=More keys

5. In the Upgrade Type field, enter \*INSTALL. This basically restores objects only.

The highlighted field shown above appears on your screen.

6. In the Plan Name field, type the name of your upgrade plan.

MULTI-PLANS: Because the plans you have set up share the same J.D. Edwards object and data libraries (usually JDFOBJ and JDFDATA), type the name of only one plan.
7. In the Source Media field, type your tape device name.
8. In the Current JDE Release Level field, type A73.
9. In the New JDE Release Level field, type A73.
10. After you verify the information on this screen, press Enter to start the installation process.
11. After you press Enter, the IBM Display Messages screen appears and asks you whether the first installation tape is loaded on the tape drive. If the first installation tape is loaded, enter Y (Yes).
12. If more than one tape exists, the installation displays a message that tells you to load another tape. If this happens, remove the current tape from your tape device, mount the next tape in sequence, and enter G (Go).
13. After you receive the message *JOB xxxxx/JDEINSTAL/INS\_STEP1 completed normally*, remove the tape from your tape drive. The second step of the installation process (INS\_STEP2) begins automatically.
14. During the second step, you will receive a JDELIVE message. Do not continue until you receive the message *JOB xxxxx/JDEINSTAL/INS\_STEP2 completed normally*.
15. Sign off as JDEINSTAL.

## Update the Menus

After the installation process completes, you must update the menus.

NOTE: If you are a new client as of A7.3, you can skip this procedure.

MULTI-PLANS: If you are installing the new system to multiple environments that do not share the same menu file (F0082, F00821, and F0083), you must set up multiple plans and perform this procedure for each menu file.

1. Set up an upgrade plan to run the Menus merge only. For instructions about setting up the plan, see *Run Individual Merges* under *Merges and Control Files (Reinstallations Only)* in this publication.

NOTE: You do not need to run the Software Versions Repository merge first.

2. To run the Menus merge, you must sign on as a user that accesses the production environment.

## **Install a New Application System**

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3. From the Merges menu (G97R41), select Standalone Merges to run the Menus merge. For instructions, see *Run Individual Merges* under *Merges and Control Files (Reinstallations Only)* in this publication.

NOTE: The Standalone Merges selection creates a Menu Merge Exceptions report (R97883A) that lists critical changes made to the menus.

4. After you run the Menus merge, print the Menu Merge Exceptions report (R97883A). For a description of this report, see *Menus Merge* under *Merges and Control Files (Reinstallations Only)* in this publication.
5. Update each menu that appears on the report by either copying the entire menu from the J.D. Edwards data library (type JDF in your upgrade plan) or updating individual menu selections. To copy a menu, select Copy DD,VO,DW,UDC,SVR, Menus from the Control File Updates menu (G97R6) and provide the required information. To update a menu selection, select Menu Selections from the Control File Updates menu (G97R6) and make the appropriate changes.

## **Build the New Files List Report**

You will use this report to create new files in the next section.

MULTI-PLANS: If you are installing the new system to multiple environments, you must perform this procedure and the next one (*Create New Files* below) for each plan. Complete both procedures for a plan before you repeat them for the next plan.

1. From the Post Upgrade Menu (G97R4), select Build New Files List.
2. After you read the message screen that appears, press F6. The Build New Files List screen appears.
3. In the blank field, enter the name of the upgrade plan you used to install the new application system. The report submits to batch.
4. Print the New Files List Report (R97452).

NOTE: If this procedure did not generate a report, you do not need to create any new files. In this case, you can skip the next section because you have finished installing the new system.

## Create New Files

Typically, you must create some new files when you install a new system.

1. From the Post Upgrade Menu (G97R4), select Create New Files.
2. After you read the message screen that appears, press F6. The Create New Files in Environ. screen appears.
3. In the Plan Name field, type the name of the upgrade plan you used to install the new application system.
4. In the Com/Prod/\*ALL field, type C to show all the common files. If you do not have a common library, type an asterisk (\*) in this field.
5. In the Create In Library field, type the name of the library in which you want the files created. If you have a common library, type the common library name. If you do not, type a production data library name.
6. After you verify your selections, press Enter. Your screen lists the files you must create.
7. Press F5 to use the defaults J.D. Edwards provides to indicate whether each file should be created with or without data.
8. After you verify the information, press Enter. The files are submitted to batch to be duplicated from the library in the FROM field to the library in the Create In Library field.
9. If you created new files in a common library in the previous steps, you must repeat those steps to create any remaining files in your production data library. You must list the new files for production data libraries by typing P in the Com/Pro/\*ALL field on the Create New Files in Environ. screen.

## Review the Installation Reports

After you have created the new files, you should review the various reports the system produced.

1. At the command entry line, enter WRKSBMJOB.
2. From the Work with Submitted Jobs screen, in the OP fields next to all jobs INS\_STEP1 and INS\_STEP2, enter 8 (Work with Spooled Files).
3. From the Work with Job Spooled Files screen, display or print the job log (QPJOBLOG) and any other reports that are listed.

## Applying the PTF Tape

After you install the new system(s), you must reapply your current PTF to this environment. This must be done so that the objects in your new system(s) will be at the same PTF level as the objects of your original systems.

Perform all the procedures in the *PTF Installation Workbook* with the following exception:

- In Phase 3, apply only the ASI's that relate to your new system(s). You have already applied all other ASI's to your other systems when you initially installed the PTF.

# Convert Multiple Production Environments

This chapter provides you with three methods to convert more than one production environment. Read the method assumptions in this chapter to determine which method is the most appropriate for your situation. After you determine the method you will use, proceed to *Preliminary Procedures for All Methods*, and then the procedures for the appropriate method, in this chapter. All methods assume you will upgrade to alternate environments, and then you will use the alternate environments to upgrade your production environments.

Each method requires you to create two sets of upgrade plans: one that you will use to upgrade the alternate environments, and the other to upgrade your production environments. You will create your upgrade plans by copying plans provided by J.D. Edwards and changing the new plans to fit your environments.

NOTE: The library names you use in your environments are probably different than the ones used in this chapter. Examine the assumptions and perform the procedures with your library names in mind.

## Method Assumptions

J.D. Edwards recommends you follow one of three methods to convert your multiple environments. The method you select depends on which approach best describes your situation. Read the method assumptions and select the most appropriate method.

NOTE: The libraries that appear in the illustrations in this section represent the following types of libraries:

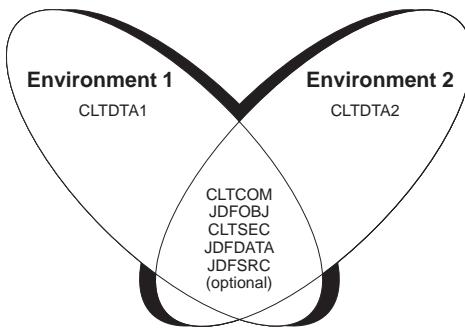
CLTDTA	Your production data library
CLTCOM	Your common library
CLTSEC	Your security library
JDFOBJ	J.D. Edwards object library
JDFDATA	J.D. Edwards data library
JDFSRC	J.D. Edwards source library

The library list for your production environment would look similar to those in one of the illustrations, but your list would not include the J.D. Edwards data library (JDFDATA).

All the methods assume that your security files (F0092, F0093, F0094, and, if you are upgrading from A6.2, A7.1, or A7.2, also F00921) and their logicals are in the security library (library type SEC in your upgrade plans).

### Assumptions for Method A

- Multiple environments exist where each environment has its own production data library, but shares the same common, object, security, source (optional), and J.D. Edwards data libraries with the other environment.



- Each production data library contains the Generic Message/Rates files (F0019, F00191, and F00192) and their associated logical files.
- The shared common library contains all of the following files:

F0004	F00163	F9611	F98301
F0005	F0090	F9620	F9831
F0016	F81901	F9621	F98311
F00161	F81902	F9801	F98312
F00162	F9601	F9802	

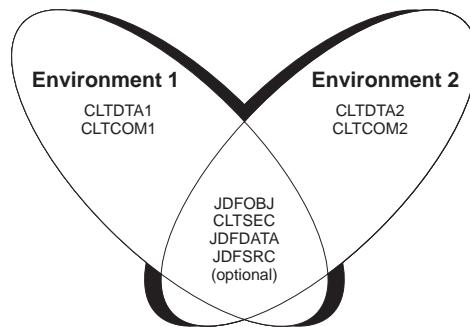
F0020, F9800 (if upgrading from A5.2)  
F9200–F9205, F9220, F9816, F98163, F98302, F98303 (if upgrading from A6.2, A7.1, or A7.2)

F126\* (if you have system 12)  
F83\* (if you have system 83)

Logical files associated with any of the above files

### Assumptions for Method B

- Multiple environments exist where each environment has its own production data library and common library, but shares the same object, security, source (optional), and J.D. Edwards data libraries with the other environment.



### Assumptions for Method C

- Multiple environments exist where each environment has its own production data library, but shares the same common, object, security, source (optional), and J.D. Edwards data libraries with the other environment. In this scenario, the production libraries contain one or more of the following files defined as common by J.D. Edwards:

F0004	F00163	F9611	F98301
F0005	F0090	F9620	F9831
F0016	F81901	F9621	F98311
F00161	F81902	F9801	F98312
F00162	F9601	F9802	

F0020, F9800 (if upgrading from A5.2)  
F9200–F9205, F9220, F9816, F98163, F98302, F98303 (if upgrading from A6.2, A7.1, or A7.2)

F126\* (if you have system 12)  
F83\* (if you have system 83)

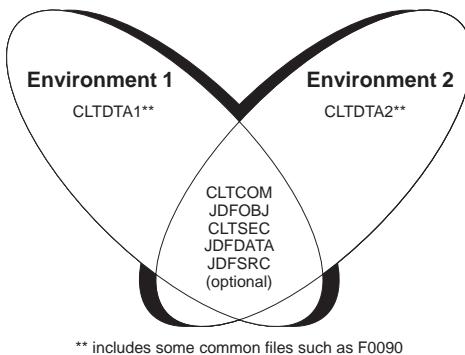
Logical files associated with any of the above files

- Each production data library contains the Generic Message/Rates files (F0019, F00191, and F00192) and their associated logical files.

## Convert Multiple Production Environments

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- The shared common library contains the remaining common files.



\*\* includes some common files such as F0090

## Preliminary Procedures for All Methods

Perform these procedures before you begin Method A, B, or C.

- Issue the LODRUN command to install the upgrade planner.
- Print the ASI Report.
- Print the special application jobs information.
- Create the alternate environments.
- Change the QJDF data area for the alternate environments.
- Create or modify user profiles to access the alternate environments.
- Change the J.D. Edwards user profile to access the alternate J.D. Edwards libraries.

Detailed instructions for these procedures are given in *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*.

## Procedures for Method A

If you meet the conditions for Method A described earlier, follow these procedures.

**IMPORTANT:** Be sure you have completed *Preliminary Procedures for All Methods* earlier in this chapter before you start this method.

### Set Up the Upgrade Plans for the Alternate Environments

You must first set up two upgrade plans: one that you will use to upgrade the entire first alternate environment, and another that you will use to convert the production data library in the second alternate environment. To set up your plans, refer to *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*.

#### Environment One

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE\_A1. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is as it appears in the ZJDE\_A1 model.

96003 Plan the Upgrade Libraries for this plan Screen 1 of 3

Plan Name. . . . . ZJDE\_A1 Mult Data Libs Share Common #1

Specify all libraries for this plan that contain J.D. Edwards files and programs. Exclude IBM libraries such as QGPL and QTEMP.

Specify current software release level and the release to upgrade to.

Current JDE Release Level . . . . . A62

New JDE Release Level . . . . . A73

Install Source Library. . . . . 0 (1=Yes, 0=No)

Install Object/Data Libraries . . 1

Lib Typ	Library Name	Library Description
COM	<u>ALTCOM</u>	<u>Client's Alternate Common Lib</u>
DTA	<u>ALTDATA1</u>	<u>Client's Alternate Data Lib #1</u>
SEC	<u>ALTSEC</u>	<u>Client's Alt Security Library</u>
JDF	<u>JDFDTAALT</u>	<u>JDE Data Library (Alternate)</u>
OBJ	<u>JDFOBJALT</u>	<u>JDE Object Library (Alternate)</u>
SRC	<u>JDFSRCALT</u>	<u>JDE Source Library (Alternate)</u>

ENTER=Update/Next Screen F12=Previous Screen F24=More Keys

Leave the value in the Install Object/Data Libraries field set to 1. If you want to install source, change the value in the Install Source Library field to 1. Change the library names to match those that are in your first environment. If you currently are at software release level A5.2, A7.1, or A7.2, change the value in the Current JDE Release Level field.

## Convert Multiple Production Environments

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NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

```
96003X      Reinstall Language Exception

Plan Name: ZJDE_ALT
Coded Character Set (CCSID) mismatch

Data Dictionary file (F9201) CCSID . . . : 00285
Dream Writer file (F98301) CCSID . . . : 00037
QCHRID System Value CCSID. . . . . : 00037

Reinstall must use CCSID other than 65535.

Please enter CCSID value to use. . . . : 00285

Enter=Continue  F3=Exit
```

2. On the Systems to Install/Upgrade screen, the Systems to Upgrade field is set to 1 for each system you have purchased. J.D. Edwards highly recommends that you install or upgrade all systems you have purchased. Use the display tape listing (DSPTAP) to determine the systems on the tape.

**IMPORTANT:** The Systems to Upgrade field is set to 1 for each application system the upgrade tape contains. Verify that all of the systems you expect to upgrade are on the tape.

NOTE: If you have purchased the InterTrans Logistics SMS/400 product or the Data Systems International WorldRF product, select the systems assigned to the product. The J.D. Edwards reinstallation process restores the libraries for these systems, but it does not perform the product installation. For product installation procedures, refer to the *Strategic Alliance Products Installation Workbook*.

3. Verify the library names on the Merge Information screen. J.D. Edwards recommends that you do not change the merge modes.
4. Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.
5. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*.

### Environment Two

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE\_A2. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is as it appears in the ZJDE\_A2 model.

96003 Plan the Upgrade Libraries for this plan Screen 1 of 3

Plan Name. . . . . ZJDE\_A2 Mult Data Libs Share Common #2

Specify all libraries for this plan that contain J.D. Edwards files and programs. Exclude IBM libraries such as QGPL and QTEMP.

Specify current software release level and the release to upgrade to.

Current JDE Release Level . . . . .	<u>A62</u>
New JDE Release Level . . . . .	<u>A73</u>

Install Source Library. . . . . 0 (1=Yes, 0=No)

Install Object/Data Libraries . . . 0

Lib	Library Name	Library Description
COM	<u>ALTCOM</u>	<u>Client's Alternate Common Lib</u>
DTA	<u>ALTDATA2</u>	<u>Client's Alternate Data Lib #2</u>
SEC	<u>ALTSEC</u>	<u>Client's Alt Security Library</u>
JDF	<u>JDFDTAALT</u>	<u>JDE Data Library (Alternate)</u>
OBJ	<u>JDFOBJALT</u>	<u>JDE Object Library (Alternate)</u>
SRC	<u>JDFSRCALT</u>	<u>JDE Source Library (Alternate)</u>

ENTER=Update/Next Screen F12=Previous Screen F24=More Keys

Leave the values in the Install Source Library and Install Object/Data Libraries fields set to 0. Change the library names to match those that are in your second environment. If you currently are at software release level A5.2, A7.1, or A7.2, change the value in the Current JDE Release Level field.

NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

96003X Reinstall Language Exception

Plan Name: ZJDE\_ALT  
Coded Character Set (CCSID) mismatch

Data Dictionary file (F9201) CCSID . . . : 00285  
Dream Writer file (F98301) CCSID . . . : 00037  
QCHRID System Value CCSID. . . . . : 00037

Reinstall must use CCSID other than 65535.

Please enter CCSID value to use. . . . : 00285

Enter=Continue F3=Exit

2. The systems you select on the Systems to Install/Upgrade screen must be the same as those you selected for your first environment.

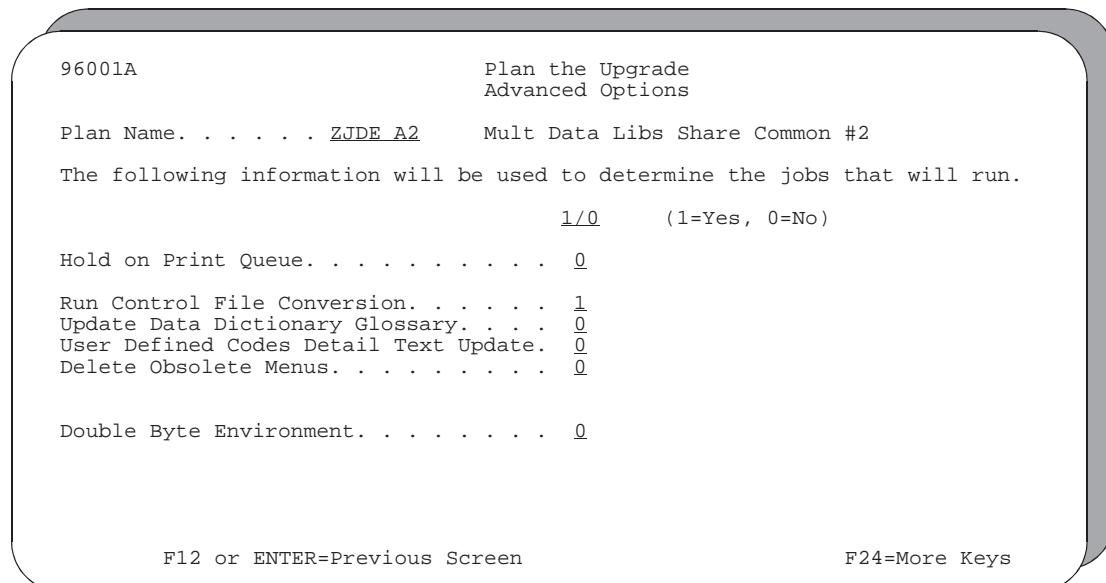
## Convert Multiple Production Environments

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3. Do not change the merge modes on the Merge Information screen. Most merge modes are set to 0 because the merges will run against the common library when you upgrade the first environment. The merge modes for generic message/rates and automatic accounting instructions are set to 2 to allow the second set of generic message/rates and automatic accounting instruction files in the second data library to be updated. If your next number files are located in your production data library, change the merge mode for next numbers to 2 also.

Verify the library names on the Merge Information screen.

4. Do not change the values in the Run Control File Conversion, Update Data Dictionary Glossary, User Defined Codes Detail Text Update, and Delete Obsolete Menus fields on the Advanced Options screen. The Run Control File Conversion field is set to 1 to convert any necessary control files that will not convert when the first environment is upgraded. This conversion will affect only those files that were not converted already.



5. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 - Plan the Upgrade* in the *Reinstall Workbook*.

### Upgrade the Alternate Environments

After you create your upgrade plans, you are ready to upgrade your alternate environments.

1. Perform these procedures before you begin to upgrade the environments.
  - Be sure no one is signed on to the alternate environments you will be upgrading.
  - Move custom objects.
  - Back up libraries.
  - Perform system-specific procedures for each environment if they apply to you.

Detailed instructions for these procedures are given at the end of *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*.

2. Perform the procedures in *Phase 2 – Upgrade the Alternate Environment* in the *Reinstallation Workbook*. Do not proceed to the next step until you receive the message *You may now sign on using your JDE profile to continue*.
3. Sign on to the first alternate environment by using the profile that you set up earlier.
4. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook*.
5. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook*.
6. Perform the procedures in *Phase 5 – Review Reports* in the *Reinstall Workbook* with the following guidelines.
  - Resolve any file conversion errors before proceeding.
  - You can begin testing this environment while you continue with the following steps to upgrade your second alternate environment.
7. Sign on to the second alternate environment by using the profile that you set up earlier.
8. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook* with the following guidelines.
  - Do not print the Menu Merge Exceptions report, the Data Dictionary Merge Report, and the User Defined Codes Merge Report because the merges associated with these reports did not run for this plan.
  - Print the New Automatic Accounting Instructions (AAI) report and apply the changes.
  - Apply only the ASIs for automatic accounting instructions (AAIs) and World Writer to the alternate data library specified in your second plan.

## **Convert Multiple Production Environments**

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- Do not apply menu changes, data dictionary changes, user defined code changes, and the remaining ASIs because they were applied when you upgraded the first alternate environment.

9. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook* with the following guidelines.

- Do not run the Rebuild Menu Word Search job. This was done when you upgraded the first alternate environment.
- Run the Build New Files List job.
- Create the new files in the alternate data library only. Common files were created when you upgraded the first alternate environment.
- Run the special application jobs.

10. Perform the procedures in *Phase 5 – Review Reports* in the *Reinstall Workbook*.

## **Set Up the Upgrade Plans for the Production Environments**

To set up an upgrade plan for each of your production environments, refer to *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook*.

## **Upgrade the Production Environments**

After you test the alternate environments, you will use them to upgrade your production environments.

1. Upgrade your first environment according to the procedures in *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook* with the following guidelines.
  - Perform all procedures up to and including the *Create files, run jobs, and review reinstallation reports* checklist item.
  - Do not perform the remaining checklist items in Phase 6 at this time.
2. Sign on to your second production environment by using the profile that you set up earlier.
3. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook* with the following guidelines.
  - Do not print the Menu Merge Exceptions report, the Data Dictionary Merge Report, the User Defined Codes Merge Report, and do not update the menu, data dictionary, and user defined code files. These steps were done when you upgraded the first production environment.
  - Print the New Automatic Accounting Instructions (AAI) report and apply the changes.

- Apply only the ASIs for automatic accounting instructions (AAIs) and World Writer to the production data library specified in your second plan. The remaining ASIs were applied when you upgraded the first production environment.

4. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook* with the following guidelines.

- Do not run the Rebuild Menu Word Search job. This was done when you upgraded the first production environment.
- Run the Build New Files List job.
- Create the new files in the production data library only. Common files were created when you upgraded the first production environment.

5. Perform the procedures in *Phase 5 – Review Reports* in the *Reinstall Workbook*.

6. Perform the following procedures in *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook*.

- Change the J.D. Edwards system values.
- Change the J.D. Edwards profile.
- Change the IBM user profile JDE.
- Rename the J.D. Edwards libraries.
- Rename the alternate libraries.
- Start the J.D. Edwards subsystems.

7. You are now ready to operate your production environments at release level A7.3.

### Procedures for Method B

If you meet the conditions for Method B described earlier, follow these procedures.

**IMPORTANT:** Be sure you have completed *Preliminary Procedures for All Methods* earlier in this chapter before you start this method.

### Set Up the Upgrade Plans for the Alternate Environments

You must first set up two upgrade plans: one that you will use to upgrade the entire first alternate environment, and another that you will use to convert the production data and common libraries in the second alternate environment. To set up your plans, refer to *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*.

#### Environment One

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE\_B1. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is as it appears in the ZJDE\_B1 model.

The screenshot shows a software interface for setting up an upgrade plan. The title bar reads '96003 Plan the Upgrade Libraries for this plan Screen 1 of 3'. The 'Plan Name' field is set to 'ZJDE\_B1 Mult Data & Common Libs #1'. A note below specifies to 'Specify all libraries for this plan that contain J.D. Edwards files and programs. Exclude IBM libraries such as QGPL and QTEMP.' It also asks to 'Specify current software release level and the release to upgrade to.' The 'Current JDE Release Level' is set to 'A62' and the 'New JDE Release Level' is set to 'A73'. The 'Install Source Library' field is set to '0' (labeled '(1=Yes, 0=No)'). The 'Install Object/Data Libraries' field is set to '1'. A table below lists library types and names with their descriptions. At the bottom, keyboard shortcuts are listed: ENTER=Update/Next Screen, F12=Previous Screen, and F24=More Keys.

Lib	Library	Library
Typ	Name	Description
COM	ALTCOM1	Client's Alt Common Library #1
DTA	ALTDAT1	Client's Alt Data Library #1
SEC	ALTSEC	Client's Alt Security Library
JDF	JDFDTAALT	JDE Data Library (Alternate)
OBJ	JDFOBJALT	JDE Object Library (Alternate)
SRC	JDFSRCALT	JDE Source Library (Alternate)

ENTER=Update/Next Screen      F12=Previous Screen      F24=More Keys

Leave the value in the Install Object/Data Libraries field set to 1. If you want to install source, change the value in the Install Source Library field to 1. Change the library names to match those that are in your first environment. If you currently are at software release level A5.2, A7.1, or A7.2, change the value in the Current JDE Release Level field.

NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

```
96003X      Reinstall Language Exception
Plan Name: ZJDE_ALT
Coded Character Set (CCSID) mismatch
Data Dictionary file (F9201) CCSID . . . : 00285
Dream Writer file (F98301) CCSID . . . : 00037
QCHRID System Value CCSID. . . . . : 00037
Reinstall must use CCSID other than 65535.
Please enter CCSID value to use. . . . : 00285
Enter=Continue  F3=Exit
```

2. On the Systems to Install/Upgrade screen, the Systems to Upgrade field is set to 1 for each system you have purchased. J.D. Edwards highly recommends that you install or upgrade all systems you have purchased. Use the display tape listing (DSPTAP) to determine the systems on the tape.

**IMPORTANT:** The Systems to Upgrade field is set to 1 for each application system the upgrade tape contains. Verify that all of the systems you expect to upgrade are on the tape.

NOTE: If you have purchased the InterTrans Logistics SMS/400 product or the Data Systems International WorldRF product, select the systems assigned to the product. The J.D. Edwards reinstallation process restores the libraries for these systems, but it does not perform the product installation. For product installation procedures, refer to the *Strategic Alliance Products Installation Workbook*.

3. Verify the library names on the Merge Information screen. J.D. Edwards recommends that you do not change the merge modes.
4. Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.
5. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*.

## Convert Multiple Production Environments

### Environment Two

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE\_B2. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is as it appears in the ZJDE\_B2 model.

96003 Plan the Upgrade Libraries for this plan Screen 1 of 3

Plan Name. . . . . ZJDE\_B2 Mult Data & Common Libs #2

Specify all libraries for this plan that contain J.D. Edwards files and programs. Exclude IBM libraries such as QGPL and QTEMP. Specify current software release level and the release to upgrade to.

Current JDE Release Level . . . . . A62  
New JDE Release Level . . . . . A73

Install Source Library. . . . . 0 (1=Yes, 0=No)  
Install Object/Data Libraries . . 0

Lib	Library Name	Library Description
COM	<u>ALTCOM2</u>	Client's Alt Common Library #2
DTA	<u>ALTDATA2</u>	Client's Alt Data Library #2
SEC	<u>ALTSEC</u>	Client's Alt Security Library
JDF	<u>JDFDTAALT</u>	JDE Data Library (Alternate)
OBJ	<u>JDFOBJALT</u>	JDE Object Library (Alternate)
SRC	<u>JDFSRCALT</u>	JDE Source Library (Alternate)

ENTER=Update/Next Screen F12=Previous Screen F24=More Keys

Leave the values in the Install Source Library and Install Object/Data Libraries fields set to 0. Change the library names to match those that are in your second environment. If you currently are at software release level A5.2, A7.1, or A7.2, change the value in the Current JDE Release Level field.

NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

96003X Reinstall Language Exception

Plan Name: ZJDE\_ALT  
Coded Character Set (CCSID) mismatch

Data Dictionary file (F9201) CCSID . . : 00285  
Dream Writer file (F98301) CCSID . . . : 00037  
QCHRID System Value CCSID. . . . . : 00037

Reinstall must use CCSID other than 65535.

Please enter CCSID value to use. . . . : 00285

Enter=Continue F3=Exit

2. The systems you select on the Systems to Install/Upgrade screen must be the same as those you selected for your first environment.

3. Verify the library names on the Merge Information screen. J.D. Edwards recommends that you do not change the merge modes.
4. Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.
5. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*.

## Upgrade the Alternate Environments

After you create your upgrade plans, you are ready to upgrade your alternate environments.

1. Perform these procedures before you begin to upgrade the environments.
  - Be sure no one is signed on to the alternate environments you will be upgrading.
  - Move custom objects.
  - Back up libraries.
  - Perform system-specific procedures for each environment if they apply to you.

Detailed instructions for these procedures are given at the end of *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*.

2. Perform the procedures in *Phase 2 – Upgrade the Alternate Environment* in the *Reinstall Workbook*. Do not proceed to the next step until you receive the message *You may now sign on using your JDE profile to continue*.
3. Sign on to the first alternate environment by using the profile that you set up earlier.
4. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook*.
5. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook*.
6. Perform the procedures in *Phase 5 – Review Reports* in the *Reinstall Workbook* with the following guidelines.
  - Resolve any file conversion errors before proceeding.
  - You can begin testing this environment while you continue with the following steps to upgrade your second alternate environment.
7. Sign on to the second alternate environment by using the profile that you set up earlier.

## **Convert Multiple Production Environments**

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8. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook*.
9. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook*.
10. Perform the procedures in *Phase 5 – Review Reports* in the *Reinstall Workbook*.

## **Set Up the Upgrade Plans for the Production Environments**

To set up an upgrade plan for each of your production environments, refer to *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook*.

## **Upgrade the Production Environments**

After you test the alternate environments, you will use them to upgrade your production environments.

1. Upgrade your first environment according to the procedures in *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook* with the following guidelines.
  - Perform all procedures up to and including the *Create files, run jobs, and review reinstallation reports* checklist item.
  - Do not perform the remaining checklist items in Phase 6 at this time.
2. Sign on to your second production environment by using the profile that you set up earlier.
3. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook*.
4. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook*.
5. Perform the procedures in *Phase 5 – Review Reports* in the *Reinstall Workbook*.
6. Perform the following procedures in *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook*.
  - Change the J.D. Edwards system values.
  - Change the J.D. Edwards profile.
  - Change the IBM user profile JDE.
  - Rename the J.D. Edwards libraries.
  - Rename the alternate libraries.
  - Start the J.D. Edwards subsystems.

7. You are now ready to operate your production environments at release level A7.3.

### Procedures for Method C

If you meet the conditions for Method C described earlier, follow these procedures.

NOTE: This method assumes that the menu file (F0090) is in each alternate and production data library. You must modify these instructions as appropriate if your data libraries contain different common files.

**IMPORTANT:** Be sure you have completed *Preliminary Procedures for All Methods* earlier in this chapter before you start this method.

### Set Up the Upgrade Plans for the Alternate Environments

You must first set up two upgrade plans: one that you will use to upgrade the entire first alternate environment, and another that you will use to convert the production data library in the second alternate environment. To set up your plans, refer to *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*.

#### Environment One

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE\_C1. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is as it appears in the ZJDE\_C1 model.

Lib	Library	Library
Typ	Name	Description
COM	ALTCOM	Client's Alt Common Library
DTA	ALTDATA1	Client's Alt Data Library #1
SEC	ALTSEC	Client's Alt Security Library
JDF	JDFDTAALT	JDE Data Library (Alternate)
OBJ	JDFOBJALT	JDE Object Library (Alternate)
SRC	JDFSRCALT	JDE Source Library (Alternate)

Leave the value in the Install Object/Data Libraries field set to 1. If you want to install source, change the value in the Install Source Library field to 1. Change the library names to match those that are in your first environment. If you currently are at software release level A5.2, A7.1, or A7.2, change the value in the Current JDE Release Level field.

## Convert Multiple Production Environments

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NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

```
96003X      Reinstall Language Exception

Plan Name: ZJDE_ALT
Coded Character Set (CCSID) mismatch

Data Dictionary file (F9201) CCSID . . . : 00285
Dream Writer file (F98301) CCSID . . . : 00037
QCHRID System Value CCSID. . . . . : 00037

Reinstall must use CCSID other than 65535.

Please enter CCSID value to use. . . . : 00285

Enter=Continue F3=Exit
```

2. On the Systems to Install/Upgrade screen, the Systems to Upgrade field is set to 1 for each system you have purchased. J.D. Edwards highly recommends that you install or upgrade all systems you have purchased. Use the display tape listing (DSPTAP) to determine the systems on the tape.

**IMPORTANT:** The Systems to Upgrade field is set to 1 for each application system the upgrade tape contains. Verify that all of the systems you expect to upgrade are on the tape.

NOTE: If you have purchased the InterTrans Logistics SMS/400 product or the Data Systems International WorldRF product, select the systems assigned to the product. The J.D. Edwards reinstallation process restores the libraries for these systems, but it does not perform the product installation. For product installation procedures, refer to the *Strategic Alliance Products Installation Workbook*.

3. Verify the library names on the Merge Information screen. J.D. Edwards recommends that you do not change the merge modes.

NOTE: This model assumes that your Menu Master file (F0090) is in the production data library of the first environment. You may have different common files in the production data library. If this is your situation, change the library names to correspond to your environment.

4. Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.
5. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*.

### Environment Two

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE\_C2. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is as it appears in the ZJDE\_C2 model.

96003 Plan the Upgrade Libraries for this plan Screen 1 of 3

Plan Name. . . . . ZJDE\_C2 Data Libs Have Common Files #2

Specify all libraries for this plan that contain J.D. Edwards files and programs. Exclude IBM libraries such as QGPL and QTEMP.

Specify current software release level and the release to upgrade to.

Current JDE Release Level . . . . . A62

New JDE Release Level . . . . . A73

Install Source Library. . . . . 0 (1=Yes, 0=No)

Install Object/Data Libraries . . . 0

Lib	Library	Library
TYP	Name	Description
COM	ALTCOM	Client's Alt Common Library
DTA	ALTDATA2	Client's Alt Data Library #2
SEC	ALTSEC	Client's Alt Security Library
JDF	JDFDTAALT	JDE Data Library (Alternate)
OBJ	JDFOBJALT	JDE Object Library (Alternate)
SRC	JDFSRCALT	JDE Source Library (Alternate)

ENTER=Update/Next Screen F12=Previous Screen F24=More Keys

Leave the values in the Install Source Library and Install Object/Data Libraries fields set to 0. Change the library names to match those that are in your second environment. If you currently are at software release level A5.2, A7.1, or A7.2, change the value in the Current JDE Release Level field.

NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

96003X Reinstall Language Exception

Plan Name: ZJDE\_ALT

Coded Character Set (CCSID) mismatch

Data Dictionary file (F9201) CCSID . . . : 00285

Dream Writer file (F98301) CCSID . . . : 00037

QCHRID System Value CCSID. . . . . : 00037

Reinstall must use CCSID other than 65535.

Please enter CCSID value to use. . . . : 00285

Enter=Continue F3=Exit

2. The systems you select on the Systems to Install/Upgrade screen must be the same as those you selected for your first environment.

## Convert Multiple Production Environments

3. Verify the merge modes and the library names on the Merge Information screen.

NOTE: This method and its associated model plans assume that the data libraries in each environment contain the Menu Master file (F0090) and the settings on the Merge Information and Advanced Options screens represent that situation.

96001E Plan the Upgrade  
Merge Information Screen 3 of 3

Environment Name . . . ZJDE\_C2 Data Libs Have Common Files #2

Specify merge modes and library names.

(0=No Merge, 1=Proof, 2=Final, 3=Replace) 0/1/2/3

		Library Name
Data Dictionary Merge. . . . .	0	ALTCOM
Vocab. Overrides Merge . . . . .	0	ALTCOM
DREAM Writer Merge . . . . .	0	ALTCOM
Menu Master Merge. . . . .	2	ALTDIA2
User Defined Codes Merge . . . . .	0	ALTCOM
Generic Message/Rates Merge. . . . .	2	ALTDIA2
Help Master Merge. . . . .	0	ALTCOM
Software Repository Merge. . . . .	0	ALTCOM
Generic Text Keys Merge. . . . .	0	ALTCOM
Auto Acct Instructions Merge . . . . .	2	ALTDIA2
Next Numbers Merge . . . . .	0	ALTCOM

Data D/Vocab Override Rebuild. 0 DREAM Writer Ver. Prefix . . . . .

F5=Printer Overrides F8=Advanced Options F12=Previous Screen F24=More Keys

The Menu Master Merge, Generic Message/Rates Merge, and Automatic Accounting Instructions Merge fields are set to 2 to update these files in the second alternate data library. The other merges are set to 0 because they will run against the files in the shared common library when the first alternate environment is upgraded. If your next number files are located in your production data library, change the merge mode for next numbers to 2 also.

4. Verify the information on the Advanced Options screen.

96001A Plan the Upgrade  
Advanced Options

Plan Name. . . . . ZJDE\_C2 Data Libs Have Common Files #2

The following information will be used to determine the jobs that will run.

1/0 (1=Yes, 0=No)

Hold on Print Queue. . . . .	0
Run Control File Conversion. . . . .	1
Update Data Dictionary Glossary. . . . .	0
User Defined Codes Detail Text Update. . . . .	0
Delete Obsolete Menus. . . . .	0

Double Byte Environment. . . . . 0

F12 or ENTER=Previous Screen F24=More Keys

The Run Control File Conversion field is set to 1 to convert any necessary control files that would not convert when the first alternate environment is upgraded. This conversion will affect only those files not previously converted. Do not change this value. The Update Data Dictionary Glossary and User Defined Codes Detail Text Update fields are set to 0 because they will run against files in the shared common library when the first alternate environment is upgraded.

NOTE: If your data libraries contain a different common file than the Menu Master file (F0090), you must change the plan information accordingly.

5. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*.

## Upgrade the Alternate Environments

After you create your upgrade plans, you are ready to upgrade your alternate environments.

1. Perform these procedures before you begin to upgrade the environments.
  - Be sure no one is signed on to the alternate environments you will be upgrading.
  - Move custom objects.
  - Back up libraries.
  - Perform system-specific procedures for each environment if they apply to you.

Detailed instructions for these procedures are given at the end of *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*.

2. Perform the procedures in *Phase 2 – Upgrade the Alternate Environment* in the *Reinstall Workbook*. Do not proceed to the next step until you receive the message *You may now sign on using your JDE profile to continue*.
3. Sign on to the first alternate environment by using the profile that you set up earlier.
4. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook*.
5. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook*.
6. Perform the procedures in *Phase 5 – Review Reports* in the *Reinstall Workbook* with the following guidelines.
  - Resolve any file conversion errors before proceeding.
  - You can begin testing this environment while you continue with the following steps to upgrade your second alternate environment.

## **Convert Multiple Production Environments**

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7. Sign on to the second alternate environment by using the profile that you set up earlier.
8. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook* with the following guidelines.
  - Do not print the Data Dictionary Merge Report and the User Defined Codes Merge Report because the merges associated with these reports did not run for this plan.
  - Apply the menu updates to the menu file in your second alternate data library if you do not copy the menu file from JDFDTAALT.
  - Print the New Automatic Accounting Instructions (AAI) report and apply the changes.
  - Apply only the ASIs for automatic accounting instructions (AAIs) and World Writer to the alternate data library specified in your second plan.
  - Do not apply data dictionary changes, user defined code changes, and the remaining ASIs because they were applied when you upgraded the first alternate environment.
9. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook* with the following guidelines.
  - Run the Build New Files List job.
  - Create the new files in the alternate data library only. Common files were created when you upgraded the first alternate environment.
  - Run the special application jobs.
10. Perform the procedures in *Phase 5 – Review Reports* in the *Reinstall Workbook*. You will have only the menu merge, New Automatic Accounting Instructions (AAI), and Generic Message/Rates Update reports. The other merges did not run for this plan.

## **Set Up the Upgrade Plans for the Production Environments**

To set up an upgrade plan for each of your production environments, refer to *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook*.

### Upgrade the Production Environments

After you test the alternate environments, you will use them to upgrade your production environments.

1. Upgrade your first environment according to the procedures in *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook* with the following guidelines.
  - o Perform all procedures up to and including the *Create files, run jobs, and review reinstallation reports* checklist item.
  - o Do not perform the remaining checklist items in Phase 6 at this time.
2. Sign on to your second production environment by using the profile that you set up earlier.
3. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook* with the following guidelines.
  - o Do not print the Data Dictionary Merge report and the User Defined Codes Merge Report because the merges associated with these reports did not run for this plan.
  - o Depending on whether you monitored changes, you can copy the menu files from your second alternate data library. If you do not copy the menu files, reapply the menu updates by using the Menu Merge Exceptions report.
  - o Print the New Automatic Accounting Instructions (AAI) report and apply the changes.
  - o Apply only the ASIs for automatic accounting instructions (AAIs) and World Writer to the production data library specified in your second plan.
  - o Do not apply data dictionary changes, user defined code changes, and the remaining ASIs because they were applied when you upgraded the first production environment.
4. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook* with the following guidelines.
  - o Run the Build New Files List job.
  - o Create the new files in the production data library only. Common files were created when you upgraded the first production environment.
  - o Run the Rebuild Menu Word Search job if you did not copy the menu files.
5. Perform the procedures in *Phase 5 – Review Reports* in the *Reinstall Workbook*.

## **Convert Multiple Production Environments**

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6. Perform the following procedures in *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook*.
  - Change the J.D. Edwards system values.
  - Change the J.D. Edwards profile.
  - Change the IBM user profile JDE.
  - Rename the J.D. Edwards libraries.
  - Rename the alternate libraries.
  - Start the J.D. Edwards subsystems.
7. You are now ready to operate your production environments at release level A7.3.

# Install PTF to Multiple Environments

This chapter provides you with three methods to install a PTF to more than one production environment. Read the method assumptions in this chapter to determine which method is the most appropriate for your situation. After you determine the method you will use, proceed to *Preliminary Procedures for All Methods*, and then the procedures for the appropriate method, in this chapter.

Each method requires you to create two upgrade plans you will use to upgrade your production environments. You will create your upgrade plans by copying plans provided by J.D. Edwards and changing the new plans to fit your environments.

NOTE: The library names you use in your environments are probably different than the ones used in this chapter. Examine the assumptions and perform the procedures with your library names in mind.

## Method Assumptions

J.D. Edwards recommends you follow one of three methods to install a PTF to your multiple environments. The method you select depends on which approach best describes your situation. Read the method assumptions and select the most appropriate method.

NOTE: The libraries that appear in the illustrations in this section represent the following types of libraries:

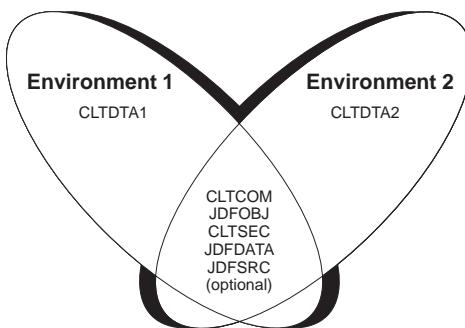
CLTDTA	Your production data library
CLTCOM	Your common library
CLTSEC	Your security library
JDFOBJ	J.D. Edwards object library
JDFDATA	J.D. Edwards data library
JDFSRC	J.D. Edwards source library

The library list for your production environment would look similar to those in one of the illustrations, but your list would not include the J.D. Edwards data library (JDFDATA).

All the methods assume that your security files (F0092, F0093, F0094, and F00921) and their logicals are in the security library (library type SEC in your upgrade plans).

### Assumptions for Method A

- Multiple environments exist where each environment has its own production data library, but shares the same common, object, security, source (optional), and J.D. Edwards data libraries with the other environment.



- Each production data library contains the Generic Message/Rates files (F0019, F00191, and F00192) and their associated logical files.
- The shared common library contains all of the following files:

F0004	F0083	F9205	F9816
F0005	F81901	F9220	F98163
F0016	F81902	F9601	F98301
F00161	F9200	F9611	F98302
F00162	F9201	F9620	F98303
F00163	F9202	F9621	F9831
F0082	F9203	F9801	F98311
F00821	F9204	F9802	F98312

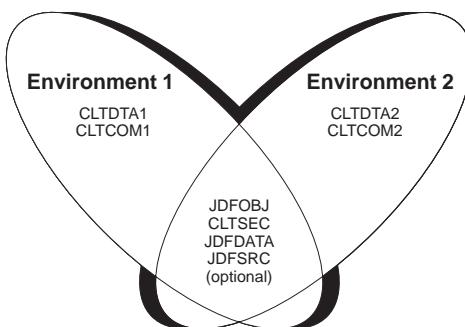
F126\* (if you have system 12)

F83\* (if you have system 83)

Logical files associated with any of the above files

### Assumptions for Method B

- Multiple environments exist where each environment has its own production data library and common library, but shares the same object, security, source (optional), and J.D. Edwards data libraries with the other environment.



## Assumptions for Method C

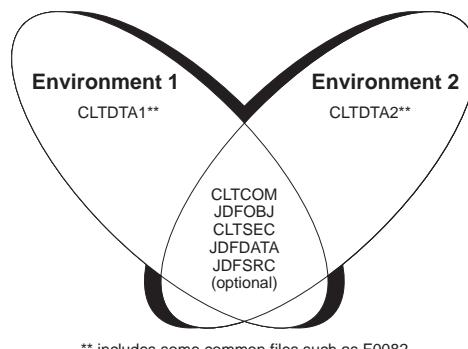
- Multiple environments exist where each environment has its own production data library, but shares the same common, object, security, source (optional), and J.D. Edwards data libraries with the other environment. In this scenario, the production libraries contain one or more of the following files defined as common by J.D. Edwards:

F0004	F0083	F9205	F9816
F0005	F81901	F9220	F98163
F0016	F81902	F9601	F98301
F00161	F9200	F9611	F98302
F00162	F9201	F9620	F98303
F00163	F9202	F9621	F9831
F0082	F9203	F9801	F98311
F00821	F9204	F9802	F98312

F126\* (if you have system 12)  
F83\* (if you have system 83)

Logical files associated with any of the above files

- Each production data library contains the Generic Message/Rates files (F0019, F00191, and F00192) and their associated logical files.
- The shared common library contains the remaining common files.



## Preliminary Procedures for All Methods

Perform these procedures before you begin Method A, B, or C.

- Issue the LODRUN command to update the upgrade planner and installation libraries (JDFINS and JDEINSTAL).
- Print the ASI Report.
- Print the special application jobs information.

Detailed instructions for these procedures are given in *Phase 1 – Plan the PTF Installation* in the *PTF Install Workbook*.

### Procedures for Method A

If you meet the conditions for Method A described earlier, follow these procedures.

**IMPORTANT:** Be sure you have completed *Preliminary Procedures for All Methods* earlier in this chapter before you start this method.

#### Set Up the Upgrade Plans

You must first set up two upgrade plans: one that you will use to upgrade the entire first environment, and another that you will use to convert the production data library in the second environment. To set up your plans, refer to *Phase 1 – Plan the PTF Installation* in the *PTF Install Workbook*.

##### Environment One

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE\_A1. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is based on the ZJDE\_A1 model.

The screenshot shows a software interface for setting up an upgrade plan. The title bar reads '96003 Plan the Upgrade Libraries for this plan Screen 1 of 3'. The 'Plan Name' field is set to 'ZJDE\_A1 Mult Data Libs Share Common #1'. A note below specifies to 'Specify all libraries for this plan that contain J.D. Edwards files and programs. Exclude IBM libraries such as QGPL and QTEMP.' It also asks to 'Specify current software release level and the release to upgrade to.' The 'Current JDE Release Level' is set to 'A73' and the 'New JDE Release Level' is set to 'A73PC000xx'. The 'Install Source Library' field is set to '0' and the 'Install Object/Data Libraries' field is set to '1'. A table below lists library types and names with their descriptions. At the bottom, keyboard shortcuts are provided: ENTER=Update/Next Screen, F12=Previous Screen, and F24=More Keys.

Lib Typ	Library Name	Library Description
COM	ALTCOM	Client's Alternate Common Lib
DTA	ALTDTA1	Client's Alternate Data Lib #1
SEC	ALTSEC	Client's Alt Security Library
JDF	JDFDTAALT	JDE Data Library (Alternate)
OBJ	JDFOBJALT	JDE Object Library (Alternate)
SRC	JDFSRCALT	JDE Source Library (Alternate)

ENTER=Update/Next Screen      F12=Previous Screen      F24=More Keys

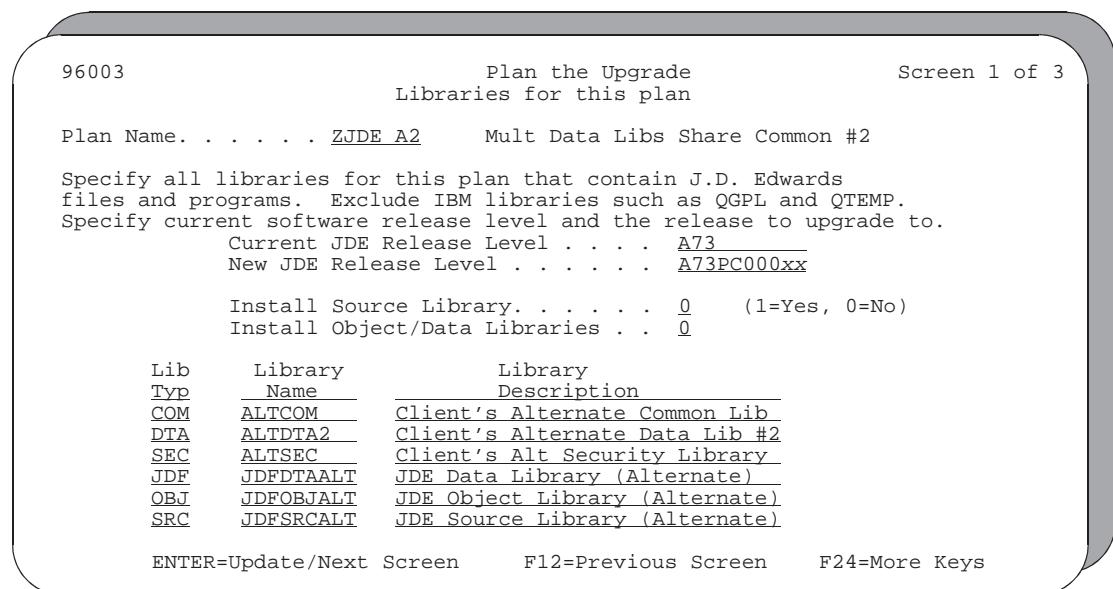
Leave the value in the Install Object/Data Libraries field set to 1. If you want to install source, change the value in the Install Source Library field to 1. Change the library names to match those that are in your first environment. Change the value in the Current JDE Release Level field to A73, and change the value in the New JDE Release Level field to the name of the PTF you want to install (for example, A73PC00001).

2. On the Systems to Install/Upgrade screen, make sure the Systems to Upgrade field is set to 1 for each system you have a license for. Press Enter twice.
3. Verify the library names on the Merge Information screen. For automatic accounting instructions and next numbers, change the merge modes to 0 because they do not run for PTFs. If you run them, blank reports are printed.
4. Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.
5. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the PTF Installation* in the *PTF Install Workbook*.

### Environment Two

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE\_A2. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is based on the ZJDE\_A2 model.



96003 Plan the Upgrade Libraries for this plan Screen 1 of 3

Plan Name. . . . . ZJDE\_A2 Mult Data Libs Share Common #2

Specify all libraries for this plan that contain J.D. Edwards files and programs. Exclude IBM libraries such as QGPL and QTEMP.

Specify current software release level and the release to upgrade to.

Current JDE Release Level . . . . . A73  
New JDE Release Level . . . . . A73PC000xx

Install Source Library. . . . . 0 (1=Yes, 0=No)  
Install Object/Data Libraries . . 0

Lib Typ	Library Name	Library Description
COM	ALTCOM	Client's Alternate Common Lib
DTA	ALTDATA2	Client's Alternate Data Lib #2
SEC	ALTSEC	Client's Alt Security Library
JDF	JDFDTAALT	JDE Data Library (Alternate)
OBJ	JDFOBJALT	JDE Object Library (Alternate)
SRC	JDFSRCALT	JDE Source Library (Alternate)

ENTER=Update/Next Screen F12=Previous Screen F24=More Keys

Leave the values in the Install Source Library and Install Object/Data Libraries fields set to 0. Change the library names to match those that are in your second environment. Change the value in the Current JDE Release Level field to A73, and change the value in the New JDE Release Level field to the name of the PTF you want to install (for example, A73PC00001).

2. The systems you select on the Systems to Install/Upgrade screen must be the same as those you selected for your first environment.

## Install PTF to Multiple Environments

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3. Do not change the merge modes on the Merge Information screen. Most merge modes are set to 0 because the merges will run against the common library when you upgrade the first environment. The Generic Message/Rates mode is set to 2 to allow the second set of generic message/rates files in the second data library to be updated. Be sure that the merge modes for automatic accounting instructions and next numbers are set to 0 because they do not run for PTFs.

Verify the library names on the Merge Information screen.

4. Do not change the values in the Run Control File Conversion, Update Data Dictionary Glossary, User Defined Codes Detail Text Update, and Delete Obsolete Menus fields on the Advanced Options screen. The Run Control File Conversion field is set to 1 to convert any necessary control files that will not convert when the first environment is upgraded. This conversion will affect only those files that were not converted already.

96001A	Plan the Upgrade Advanced Options
Plan Name. . . . .	<u>ZJDE A2</u> Mult Data Libs Share Common #2
The following information will be used to determine the jobs that will run.	
1/0 (1=Yes, 0=No)	
Hold on Print Queue. . . . .	0
Run Control File Conversion. . . . .	1
Update Data Dictionary Glossary. . . . .	0
User Defined Codes Detail Text Update. . . . .	0
Delete Obsolete Menus. . . . .	0
Double Byte Environment. . . . .	0
F12 or ENTER=Previous Screen	
F24=More Keys	

5. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the PTF Installation* in the *PTF Install Workbook*.

## Upgrade the Production Environments

After you create your upgrade plans, you are ready to upgrade your environments.

1. Perform the procedures in *Phase 2A – Install the PTF (One-Step Method)* or *Phase 2B – Install the PTF (Two-Step Method)*, whichever is appropriate for your situation, in the *PTF Install Workbook*. Do not proceed to the next step until you receive the message *You may now sign on using your JDE User Profile to continue*.
2. Sign on to the first environment.
3. Perform the procedures in *Phase 3 – Update Applications* in the *PTF Install Workbook*.
4. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *PTF Install Workbook*.
5. Perform the procedures in *Phase 5 – Review Reports* in the *PTF Install Workbook*. Resolve any file conversion errors before proceeding.
6. Sign on to the second environment.
7. Perform the procedures in *Phase 3 – Update Applications* in the *PTF Install Workbook* with the following guidelines.
  - o Do not print the Menu Comparison Report and the Data Dictionary Merge Report because the merges associated with these reports did not run for this plan.
  - o Apply only the ASIs for automatic accounting instructions (AAIs), next numbers, and World Writer to the data library specified in your second plan.
  - o Do not apply menu changes, data dictionary changes, and the remaining ASIs because they were applied when you upgraded the first environment.
8. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *PTF Install Workbook* with the following guidelines.
  - o Do not run the Rebuild Menu Word Search job. This was done when you upgraded the first environment.
  - o Run the Rebuild FRF and JDE Message File job only if your FRF files are in the data library specified in your second plan. If they are in your shared common library, they were built when you performed this job for your first plan.
  - o Run the Build New Files List job.
  - o Create the new files in the data library only. Common files were created when you upgraded the first environment.
  - o Run the special application jobs.

## Install PTF to Multiple Environments

9. Perform the procedures in *Phase 5 – Review Reports* in the *PTF Install Workbook*. The Generic Rate/Message Update report is the only merge report produced because all other merges did not run for this plan.
10. You are now ready to operate your production environments at the new PTF level.

## Procedures for Method B

If you meet the conditions for Method B described earlier, follow these procedures.

**IMPORTANT:** Be sure you have completed *Preliminary Procedures for All Methods* earlier in this chapter before you start this method.

### Set Up the Upgrade Plans

You must first set up two upgrade plans: one that you will use to upgrade the entire first environment, and another that you will use to convert the production data and common libraries in the second environment. To set up your plans, refer to *Phase 1 – Plan the PTF Installation* in the *PTF Install Workbook*.

#### Environment One

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE\_B1. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is based on the ZJDE\_B1 model.

Lib	Type	Library Name	Library Description
COM		ALTCOM1	Client's Alt Common Library #1
DTA		ALTDATA1	Client's Alt Data Library #1
SEC		ALTSEC	Client's Alt Security Library
JDF		JDFDTAALT	JDE Data Library (Alternate)
OBJ		JDOBJALT	JDE Object Library (Alternate)
SRC		JDFSRCALT	JDE Source Library (Alternate)

Leave the value in the Install Object/Data Libraries field set to 1. If you want to install source, change the value in the Install Source Library field to 1. Change the library names to match those that are in your first environment. Change the value in the Current JDE Release Level field to A73, and change the value in the New JDE Release Level field to the name of the PTF you want to install (for example, A73PC00001).

2. On the Systems to Install/Upgrade screen, make sure the Systems to Upgrade field is set to 1 for each system you have a license for. Press Enter twice.
3. Verify the library names on the Merge Information screen. For automatic accounting instructions and next numbers, change the merge modes to 0 because they do not run for PTFs. If you run them, blank reports are printed.
4. Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.
5. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the PTF Installation* in the *PTF Install Workbook*.

### Environment Two

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE\_B2. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is based on the ZJDE\_B2 model.

Lib Typ	Library Name	Library Description
COM	ALTCOM2	Client's Alt Common Library #2
DTA	ALTTDA2	Client's Alt Data Library #2
SEC	ALTSEC	Client's Alt Security Library
JDF	JDFDTAALT	JDE Data Library (Alternate)
OBJ	JDFOBJALT	JDE Object Library (Alternate)
SRC	JDFSRCALT	JDE Source Library (Alternate)

Leave the values in the Install Source Library and Install Object/Data Libraries fields set to 0. Change the library names to match those that are in your second environment. Change the value in the Current JDE Release Level field to A73, and change the value in the New JDE Release Level field to the name of the PTF you want to install (for example, A73PC00001).

## **Install PTF to Multiple Environments**

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2. The systems you select on the Systems to Install/Upgrade screen must be the same as those you selected for your first environment.
3. Verify the library names on the Merge Information screen. For automatic accounting instructions and next numbers, change the merge modes to 0 because they do not run for PTFs. If you run them, blank reports are printed.
4. Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.
5. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the PTF Installation* in the *PTF Install Workbook*.

## **Upgrade the Production Environments**

After you create your upgrade plans, you are ready to upgrade your environments.

1. Perform the procedures in *Phase 2A – Install the PTF (One-Step Method)* or *Phase 2B – Install the PTF (Two-Step Method)*, whichever is appropriate for your situation, in the *PTF Install Workbook*. Do not proceed to the next step until you receive the message *You may now sign on using your JDE User Profile to continue*.
2. Sign on to the first environment.
3. Perform the procedures in *Phase 3 – Update Applications* in the *PTF Install Workbook*.
4. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *PTF Install Workbook*.
5. Perform the procedures in *Phase 5 – Review Reports* in the *PTF Install Workbook*. Resolve any file conversion errors before proceeding.
6. Sign on to the second environment.
7. Perform the procedures in *Phase 3 – Update Applications* in the *PTF Install Workbook*.
8. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *PTF Install Workbook*.
9. Perform the procedures in *Phase 5 – Review Reports* in the *PTF Install Workbook*.
10. You are now ready to operate your production environments at the new PTF level.

## Procedures for Method C

If you meet the conditions for Method C described earlier, follow these procedures.

NOTE: This method assumes that the Menu Master file (F0082) is in each production data library. You must modify these instructions as appropriate if your data libraries contain different common files.

**IMPORTANT:** Be sure you have completed *Preliminary Procedures for All Methods* earlier in this chapter before you start this method.

### Set Up the Upgrade Plans

You must first set up two upgrade plans: one that you will use to upgrade the entire first environment, and another that you will use to convert the production data library in the second environment. To set up your plans, refer to *Phase 1 – Plan the PTF Installation* in the *PTF Install Workbook*.

#### Environment One

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE\_C1. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is based on the ZJDE\_C1 model.

96003 Plan the Upgrade Libraries for this plan Screen 1 of 3

Plan Name. . . . . ZJDE\_C1 Data Libs Have Common Files #1

Specify all libraries for this plan that contain J.D. Edwards files and programs. Exclude IBM libraries such as QGPL and QTEMP.

Specify current software release level and the release to upgrade to.

Current JDE Release Level . . . . . A73  
New JDE Release Level . . . . . A73PC000xx

Install Source Library. . . . . 0 (1=Yes, 0=No)  
Install Object/Data Libraries . . 1

Lib	Library	Library
Typ	Name	Description
COM	ALTCOM	Client's Alt Common Library
DTA	ALTDATA1	Client's Alt Data Library #1
SEC	ALTSEC	Client's Alt Security Library
JDF	JDFDTAALT	JDE Data Library (Alternate)
OBJ	JDFOBJALT	JDE Object Library (Alternate)
SRC	JDFSRCALT	JDE Source Library (Alternate)

ENTER=Update/Next Screen F12=Previous Screen F24=More Keys

Leave the value in the Install Object/Data Libraries field set to 1. If you want to install source, change the value in the Install Source Library field to 1. Change the library names to match those that are in your first environment. Change the value in the Current JDE Release Level field to A73, and change the value in the New JDE Release Level field to the name of the PTF you want to install (for example, A73PC00001).

## Install PTF to Multiple Environments

2. On the Systems to Install/Upgrade screen, make sure the Systems to Upgrade field is set to 1 for each system you have a license for. Press Enter twice.
3. Verify the library names on the Merge Information screen. For automatic accounting instructions and next numbers, change the merge modes to 0 because they do not run for PTFs. If you run them, blank reports are printed.

NOTE: This model assumes that your Menu Master file (F0082) is in the production data library of the first environment. You may have different common files in the production data library. If this is your situation, change the library names to correspond to your environment.

4. Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.
5. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the PTF Installation* in the *PTF Install Workbook*.

### Environment Two

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE\_C2. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is based on the ZJDE\_C2 model.

The screenshot shows the 'Plan the Upgrade Libraries for this plan' screen (96003) with the following details:

Plan Name. . . . . ZJDE\_C2 Data Libs Have Common Files #2

Specify all libraries for this plan that contain J.D. Edwards files and programs. Exclude IBM libraries such as QGPL and QTEMP.

Specify current software release level and the release to upgrade to.

Current JDE Release Level . . . . . A73

New JDE Release Level . . . . . A73PC000xx

Install Source Library. . . . . 0 (1=Yes, 0=No)

Install Object/Data Libraries . . 0

Lib	Library	Library
Typ	Name	Description
COM	ALTCOM	Client's Alt Common Library
DTA	ALTDATA2	Client's Alt Data Library #2
SEC	ALTSEC	Client's Alt Security Library
JDF	JDFDTAALT	JDE Data Library (Alternate)
OBJ	JDFOBJALT	JDE Object Library (Alternate)
SRC	JDFSRCALT	JDE Source Library (Alternate)

ENTER=Update/Next Screen F12=Previous Screen F24=More Keys

Leave the values in the Install Source Library and Install Object/Data Libraries fields set to 0. Change the library names to match those that are in your second environment. Change the value in the Current JDE Release Level field to A73, and change the value in the New JDE Release Level field to the name of the PTF you want to install (for example, A73PC00001).

2. The systems you select on the Systems to Install/Upgrade screen must be the same as those you selected for your first environment.

## Install PTF to Multiple Environments

3. Verify the merge modes and the library names on the Merge Information screen.

NOTE: This method and its associated model plans assume that the data libraries in each environment contain the Menu Master file (F0082) and the settings on the Merge Information and Advanced Options screens represent that situation.

96001E Plan the Upgrade Screen 3 of 3  
 Merge Information

Environment Name . . . ZJDE\_C2 Data Libs Have Common Files #2

Specify merge modes and library names.

(0=No Merge, 1=Proof, 2=Final, 3=Replace) 0/1/2/3 Library Name

Data Dictionary Merge . . . . .	<u>0</u>	Data Dictionary. . . . .	<u>ALTCOM</u>
Vocab. Overrides Merge . . . . .	<u>0</u>	Vocabulary Overrides . . . . .	<u>ALTCOM</u>
DREAM Writer Merge . . . . .	<u>0</u>	DREAM Writer . . . . .	<u>ALTCOM</u>
Menu Master Merge. . . . .	<u>2</u>	Menu Master. . . . .	<u>ALTDIA2</u>
User Defined Codes Merge . . . . .	<u>0</u>	User Defined Codes . . . . .	<u>ALTCOM</u>
Generic Message/Rates Merge. . . . .	<u>2</u>	Generic Message/Rates. . . . .	<u>ALTDIA2</u>
Help Master Merge. . . . .	<u>0</u>	Help Master. . . . .	<u>ALTCOM</u>
Software Repository Merge. . . . .	<u>0</u>	Software Repository. . . . .	<u>ALTCOM</u>
Generic Text Keys Merge. . . . .	<u>0</u>	Gen. Text Applic. Key Files	<u>ALTCOM</u>
Auto Acct Instructions Merge . . . . .	<u>0</u>	Auto Acct Instructions . . .	<u>ALTDIA2</u>
Next Numbers Merge . . . . .	<u>0</u>	Next Numbers . . . . .	<u>ALTCOM</u>
Data D/Vocab Override Rebuild. <u>0</u>		DREAM Writer Ver. Prefix .	<u>      </u>

F5=Printer Overrides F8=Advanced Options F12=Previous Screen F24=More Keys

The Menu Master Merge and Generic Message/Rates Merge fields are set to 2 to update these files in the second data library. The other merges are set to 0 because they will run against the files in the shared common library when the first environment is upgraded. Be sure that the merge modes for automatic accounting instructions and next numbers are set to 0 because they do not run for PTFs.

4. Verify the information on the Advanced Options screen.

96001A Plan the Upgrade  
Advanced Options

Plan Name. . . . . ZJDE C2 Data Libs Have Common Files #2

The following information will be used to determine the jobs that will run.

1/0 (1=Yes, 0=No)

Hold on Print Queue. . . . . 0

Run Control File Conversion. . . . . 1

Update Data Dictionary Glossary. . . . . 0

User Defined Codes Detail Text Update. 0

Delete Obsolete Menus. . . . . 0

Double Byte Environment. . . . . 0

## **Install PTF to Multiple Environments**

---

The Run Control File Conversion field is set to 1 to convert any necessary control files that would not convert when the first environment is upgraded. This conversion will affect only those files not previously converted. Do not change this value. The Update Data Dictionary Glossary and User Defined Codes Detail Text Update fields are set to 0 because they will run against files in the shared common library when the first environment is upgraded.

NOTE: If your data libraries contain a different common file than the Menu Master file (F0082), you must change the plan information accordingly.

5. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the PTF Installation* in the *PTF Install Workbook*.

## **Upgrade the Production Environments**

After you create your upgrade plans, you are ready to upgrade your environments.

1. Perform the procedures in *Phase 2A – Install the PTF (One-Step Method)* or *Phase 2B – Install the PTF (Two-Step Method)*, whichever is appropriate for your situation, in the *PTF Install Workbook*. Do not proceed to the next step until you receive the message *You may now sign on using your JDE User Profile to continue*.
2. Sign on to the first environment.
3. Perform the procedures in *Phase 3 – Update Applications* in the *PTF Install Workbook*.
4. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *PTF Install Workbook*.
5. Perform the procedures in *Phase 5 – Review Reports* in the *PTF Install Workbook*. Resolve any file conversion errors before proceeding.
6. Sign on to the second environment.
7. Perform the procedures in *Phase 3 – Update Applications* in the *PTF Install Workbook* with the following guidelines.
  - o Do not print the Data Dictionary Merge Report because the merge associated with this report did not run for this plan.
  - o Apply the menu updates to the menu file in your second data library.
  - o Apply only the ASIs for automatic accounting instructions (AAIs), next numbers, and World Writer to the data library specified in your second plan.
  - o Do not apply data dictionary changes and the remaining ASIs because they were applied when you upgraded the first environment.

8. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *PTF Install Workbook* with the following guidelines.
  - Run the Rebuild FRF and JDE Message File job only if your FRF files are in the data library specified in your second plan. If they are in your shared common library, they were built when you performed this job for your first plan.
  - Run the Build New Files List job.
  - Create the new files in the data library only. Common files were created when you upgraded the first environment.
  - Run the special application jobs.
9. Perform the procedures in *Phase 5 – Review Reports* in the *PTF Install Workbook*. You will have only the menu merge and Generic Message/Rates Update reports. The other merges did not run for this plan.
10. You are now ready to operate your production environments at the new PTF level.



## Multiple Environment Lists (J98INITA)

This chapter describes how you can create a multiple environment list for each user and control the printing of reports produced during the upgrade process.

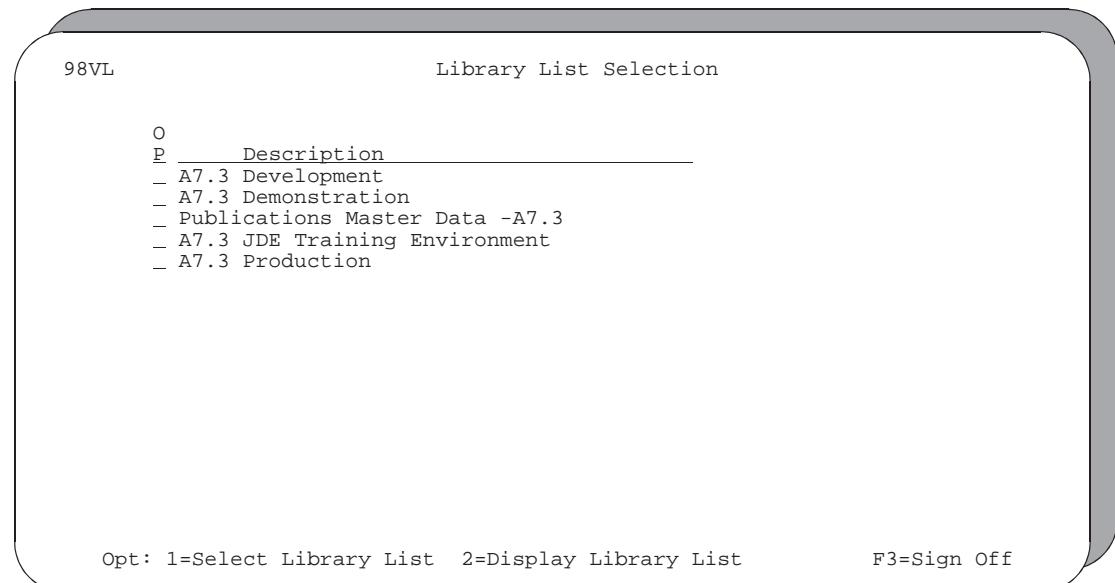
The multiple environment program (J98INITA) lets you create:

- A library list once and attach multiple users to it
- A “multiple” environment that lets a user select an environment from a list of environments

This program also lets you transfer easily among software environments. For example, you can:

- Create a custom library list menu for the multiple environments
- Access a J.D. Edwards software environment by selecting it from the custom library list menu
- Exit from the J.D. Edwards software environment to the custom library list menu without redefining the environment

An example of a library list menu appears below.



The following sections explain the procedures for creating the multiple environment list.

### **Authorize Users to Run the J98INITA Program**

The multiple environment program (J98INITA) duplicates and changes the job description for a user profile from QGPL to QTEMP by using the CRTDUPOBJ and CHGJOBD commands. To run J98INITA successfully, you must first authorize all user profiles to use these commands.

To assign \*USE authority to the CRTDUPOBJ command:

1. Type EDTOBJAUT on a command entry line and press F4 (Prompt). The Edit Object Authority (EDTOBJAUT) screen appears.
2. Type CRTDUPOBJ in the Object field, \*LIBL in the Library field, and \*CMD in the Object Type field. Press Enter. The Edit Object Authority screen appears.
3. Assign \*USE authority to the appropriate users or to \*PUBLIC. Use F6 to add new users.

To assign \*USE authority to the CHGJOBD command:

1. Type EDTOBJAUT on a command entry line and press F4 (Prompt). The Edit Object Authority (EDTOBJAUT) screen appears.
2. Type CHGJOBD in the Object field, \*LIBL in the Library field, and \*CMD in the Object Type field. Press Enter. The Edit Object Authority screen appears.
3. Assign \*USE authority to the appropriate users or to \*PUBLIC. Use F6 to add new users.

## Create Files Required by the J98INITA Program

To successfully run the J98INITA program, you must create the User Library List Master file (F0093), the Library List Master file (F0094), and their associated logicals.

1. Be sure you are signed on as JDE.
2. Select Data Files from the Data Base Management menu (G9645).
3. Type 00 in the Enter System Code field, the name of the library that contains the F0092 file in the Create In Library field, and JDFDATA (or the J.D. Edwards library that contains the F0093 and F0094 files) in the Source/From Libr field. Press Enter.
4. Type 2 (Create duplicate without data) in the Sel (Selection) field next to each of the following files:

<u>File Name</u>	<u>File Description</u>
F0093	Library List Control
F0094	Library List Master File
F0093LA	User and Sequence Number
F0093LB	Library Name and User
F0094LA	Multi-Format by Library

5. Press Enter. The system creates the selected files in the specified library.

## Specify J98INITA as the Initial Program

To automatically run the J98INITA program when the user signs on, you must specify J98INITA as the initial program to run. Repeat the following steps for each user profile you want set up in this way.

1. Type CHGUSRPRF on a command entry line and press F4 (Prompt). The Change User Profile (CHGUSRPRF) screen appears.
2. Type the user profile name in the User Profile field and press F10 (Additional Parameters).
3. Type J98INITA in the Initial Program to Call field. Press Enter.

NOTE: If you will be accessing library lists that include a variety of earlier releases (including A7.2 or earlier), J98INITA must be called from the object library of the most recent release level.

## Set Up User Information

You must be sure user information exists for each user profile. Select User Information Revisions from the Library List Control menu (G944) and inquire on each user ID. If information for a user profile does not exist, type A in the Action Code field and the user name in the User ID field. Fill out the screen with the appropriate information and press Enter. An example appears below.

NOTE: If you have already entered user information by using the Security Officer menu (G94), you do not need to enter the information again. The list of libraries associated with the user profile (discussed in sections that follow) will override any library list currently associated with the user.

0092N	User Information Revisions	Action Code. . . . .	
User ID. . . . .	<u>USERNAME</u>		
User Security:	A J K DP F		
Menu Mask. . . . .	— — — — —		
Initial Menu to Execute. . . . .	<u>G</u>		
Initial Program. . . . .	_____		
Menu Travel. . . . .	<u>Y</u>		
Command Entry. . . . .	<u>Y</u>		
Allow Fast Path (Y/N). . . . .	<u>Y</u>		
Menu Level . . . . .	—		
User Type. . . . .	_____		
User Class/Group . . . . .	_____		
Batch Job Queue. . . . .	<u>QBATCH</u>		
Job Scheduling Priority. . . . .	<u>5</u>		
Output Priority. . . . .	<u>5</u>		
Logging(level/severity/messages) . . . . .	<u>4 00 *NOLIST</u>		
Output Queue . . . . .	<u>MARSHALL</u>		
Optional Printer File Library. . . . .	_____		
Current Library. . . . .	_____		
Address Number . . . . .	_____		
Set Attention Program. . . . .	<u>QCMD</u>		
F6=Display/Lang Pref	F9=Library Inquiry	F21=Print Lib List	F24=More

## Set Up Library Lists

When a user signs on, a list of environments appears on their screen if the initial program assigned to that user is J98INITA (multiple environment program) and more than one library list from which to select exists. Each environment must be defined by a list of libraries that are accessed when the user selects the environment. You must set up a library list for each environment you want to appear on a multiple environment list.

Select Library List Revisions from the Library List Control menu (G944). Then from the Library List Revisions screen, specify the following information.

---

FIELD	EXPLANATION
Action Code	Specify A to add a new environment.
Library List Name	Specify a unique name for the new environment (up to nine characters).
Description	Specify a description (up to 30 characters) for the environment.
Menu Program ID	Type P00MENU, which is the name of the menu driver required to run J98INITA.
Library List	Specify the names of libraries to be included in the environment. You must list the libraries in the order you want them accessed when the user selects the environment. Use blanks to separate the library names. The total number of libraries, including both the system library list and the job library list, cannot exceed 25.
<b>IMPORTANT:</b> Your list must include the QTEMP (IBM Temporary Data Files) and QGPL (IBM General Purpose Library) libraries. QTEMP must be listed before QGPL.	

---

An example of a library list assigned to an environment follows:

The screenshot shows a software interface for setting up a library list. The title bar reads "0094 Library List Revisions". The screen contains the following fields and their values:

Action Code.	...	<u>I</u>
Library List Name.	...	<u>JDESOFT</u>
Description.	...	<u>A7.3</u>
Menu Program ID.	...	<u>P00MENU</u>
Library List	...	<u>QTEMP JDFOBJ COMMON xxxDATA JDFSRC QGPL</u>

Below these fields are several empty lines for additional entries.

## **Multiple Environment Lists (J98INITA)**

Descriptions of the libraries that appear on the previous screen follow:

<u>Library Name</u>	<u>Library Description</u>
QTEMP	IBM Temporary Data Files
JDFOBJ	J.D. Edwards Object Code
COMMON	Your Common Data Library
xxxDATA	Your "Live" Data Files
JDFSRC	J.D. Edwards Source Code (if source exists)
QGPL	IBM General Purpose Library

Assuming you have a custom source library named CLTSRC and a custom object library named CLTOBJ, your production library list would look similar to the following:

0094	Library List	Revisions
Action Code. . . . .	I	
Library List Name. . .	CUSTOM	
Description. . . . .	Custom A7.3	
Menu Program ID. . . .	P00MENU	
Library List . . . . .	QTEMP CLTOBJ JDFOBJ COMMON xxxDATA CLTSRC JDFSRC QGPL	

After you verify your information, press Enter. The environment with its associated library list is added.

## **Assign Library Lists to Each User**

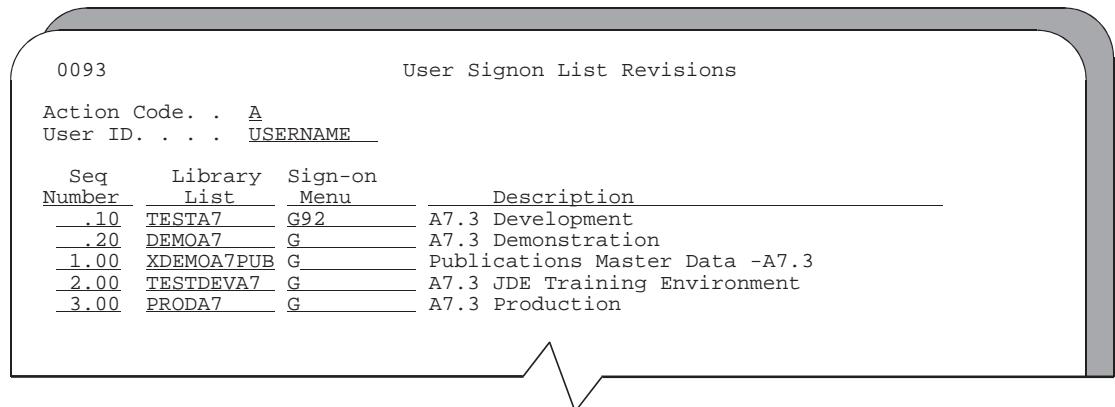
After you specify user information for all your user profiles and define the environments with library lists, you can assign specific environments to each user.

Select User Signon List Revisions from the Library List Control menu (G944). Then from the User Signon List Revisions screen, indicate the following information.

FIELD	EXPLANATION
Action Code	Specify A to add.
User ID	Specify the name of the user profile.
Seq Number	Specify a number that indicates where in the multiple environment list you want the environment selection to be positioned. Based on this number, the environments will be ordered lowest to highest.
Library List	Specify the name of an existing environment (up to nine characters).

FIELD	EXPLANATION
Sign-on Menu	Specify the name of the menu (for instance, G or G92) you want to appear when the user signs on. This specification overrides the Initial Menu to Execute value that appears on the User Information screen.
Description	The description associated with the specified environment. This field does not require your input (appears after you press Enter and re-inquire on the user ID).

Your screen should look similar to the one below.



Seq Number	Library List	Sign-on Menu	Description
.10	TESTA7	G92	A7.3 Development
.20	DEMOA7	G	A7.3 Demonstration
1.00	XDEMOA7PUB	G	Publications Master Data -A7.3
2.00	TESTDEVA7	G	A7.3 JDE Training Environment
3.00	PRODA7	G	A7.3 Production

After you verify the information, press Enter. When the user in this example signs on, the Library List Selection screen that was illustrated earlier in this chapter (page 11-1) appears.



# Miscellaneous

This chapter explains what happens to your DREAM Writer versions during reinstallation conversions, and explains how to change the print file attributes for all J.D. Edwards reports. It also includes how to use the optional tools that appear on the Post Upgrade Menu (G97R4) and the PTF Post Upgrade Menu (G97PTF), and how to install source only.

## How the DREAM Writer Conversion Affects Your Versions

If you are reinstalling from release A5.2, the conversion process changes your version IDs from three digits to 10 characters (up to six alpha characters followed by four digits). You can specify in the upgrade planner the alpha prefix you want added to some of your version IDs. If you choose not to add a prefix, some of your version IDs will be converted to four digits only (for example, version 003 would become version 0003).

All versions delivered in the J.D. Edwards data library (usually JDFDATA) are prefixed by the letters XJDE or ZJDE. Versions with the prefix XJDE are automatically merged into your files from the J.D. Edwards data library during the DREAM Writer merge. You can use the XJDE versions as models from which to create your own versions.

XJDETR versions are for use in J.D. Edwards training classes.

Any DREAM Writer version that runs from a menu or a function key (blind versions) are prefixed with ZJDE. The conversion renames some of your existing versions with this prefix.

The following page shows examples of how the conversion process would affect different versions.

## Examples

The following examples show how your versions are renamed with either the ZJDE prefix or with the prefix you specified in your upgrade plan (for these examples, CLNT). The examples also show how new J.D. Edwards versions (XJDE or ZJDE) are merged into your files. Each example can apply to any DREAM Writer form ID.

### Example One

<u>A7 J.D. Edwards Data Library Versions</u>	<u>Your A5 Versions Before Conversion</u>	<u>Your Versions After Conversion</u>
ZJDE0001	001	ZJDE0001
ZJDE0002	002	ZJDE0002
	003	CLNT0003

The conversion renames your existing versions 001 and 002 to ZJDE0001 and ZJDE0002 respectively. The conversion assumes versions 001 and 002 are DEMO versions even though they may not be assigned to the user ID DEMO. If your versions (001 and 002 in this case) are not DEMO versions, your ZJDE versions after conversion may not have the same options, selection criteria, and so on, as the ZJDE versions in the J.D. Edwards data library. Because no ZJDE0003 exists in the J.D. Edwards data library, the conversion adds the prefix CLNT and an additional zero (0) to your version 003.

### Example Two

<u>A7 J.D. Edwards Data Library Versions</u>	<u>Your A5 Versions Before Conversion</u>	<u>Your Versions After Conversion</u>
ZJDE0001	001	ZJDE0001
ZJDE0002		ZJDE0002

The conversion renames your version 001 to ZJDE0001, and the DREAM Writer merge adds the new J.D. Edwards version ZJDE0002.

### Example Three

<u>A7 J.D. Edwards Data Library Versions</u>	<u>Your A5 Versions Before Conversion</u>	<u>Your Versions After Conversion</u>
XJDE0001	001	CLNT0001 XJDE0001

Because no ZJDE0001 exists in the J.D. Edwards data library, the conversion adds the prefix CLNT and an additional zero (0) to your version 001. The DREAM Writer merge adds the new J.D. Edwards version XJDE0001.

## How the Menu Conversion Affects Your Menu Selections

If you are reinstalling from release A5.2, the conversion process automatically changes menu selections that access DREAM Writer versions to the ZJDE version IDs. If no ZJDE versions exist, menu selections are changed to the version IDs that have the prefix you specified in the upgrade plan. The Menu Conversion Report (R98CMNU01) lists the changes that were made to version IDs on each menu.

## Printer Issues

The print file settings in your upgrade plan control how reports are printed during the installation or reinstallation process only. To change the print file attributes for all J.D. Edwards reports, perform the following procedures.

NOTE: These procedures apply to both reinstallations and PTFs.

### Change Existing DREAM Writer Printer Overrides

This procedure updates all existing DREAM Writer printer overrides with the values you specify.

1. Select Global Versions Prnt Override from the DREAM Writer menu (G81).
2. After you read the message screen that appears, press F6 (Execute).
3. Type P in the Form ID: From field.
4. Leave the Form ID: Thru field blank.
5. Type the new values in the appropriate fields. If you want a field to remain unchanged, leave it blank. If you want the default value to be used for a field, type an asterisk (\*).
6. After you verify your information, press Enter.

### Change Standard Print Files

This procedure updates all standard print files with the values you specify.

1. Type CHGPRTF at the command entry line, then press F4 (Prompt).
2. Type R\* in the File field, then press F10 (Additional Parameters).
3. Type the new values in the appropriate fields.
4. After you verify your information, press Enter.

After you complete the upgrade process and you perform the ASIs, you can create the Menu Integrity Report (R990090) for reinstallations only. This report lists possible problems with your menus, such as menu selections that call obsolete programs.

## Menu Integrity Report

By running this report, you can identify possible problems not encountered during the upgrade process that could cause your J.D. Edwards software to not run properly. It shows menu names and selections along with selection information and exception descriptions. The exception descriptions indicate possible problems that may occur when you select an item from a menu.

### Run the Report

To run the Menu Integrity Report:

1. Be sure you are signed on as a user who accesses a production library.
2. From the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF), select Utilities. From the Upgrade Utilities menu, select Run Menu Integrity Report. A versions list appears.
3. Type 1 (Run) in the O (Option) field next to version XJDE0001 (Menu Integrity Report – All Menus). The report submits to batch. An example of the report follows:

J.D. Edwards & Company Menu Integrity Report							Page - . . . 1	Date - . . . 02.05.96
Menu Name	Inst Syst	L P	Mn Sl to Execute	Menu Job Selection	Form ID	Version Number	Run Time Message	Exception Description
G	00	10	*A08	Human Resources		MENUMSG129	Menu Message	Invalid sys code
G	00	1	*A08	Human Resources		MENUMSG129	Menu Message	Invalid sys code
G07A2246	07	14	J0627	WC Summary -- (F0627)	P0627		Program Not in *LIBL	
G07A302	07	19	J82001	Table Method Explanations	Q07	ZJDE0001	Invalid Form ID	
G07A302	07	19	J82001	Table Method Explanations	Q07	ZJDE0001	Invalid DREAM Writer version	
G07E11	07	04	J066304	Establishment Summary Report	P066304		Invalid Form ID	
G07E11	07	04	J066304	Establishment Summary Report	P066304		Program Not in *LIBL	
G07G4	07	06	J09610	Extract Account Master for DL	P09610		Program Obsolete - Check SVR	
G07G4	07	06	J09610	Extract Account Master for DL	P09610		Invalid Form ID	
G07G4	07	06	J09610	Extract Account Master for DL	P09610		Program Not in *LIBL	
G07H3	07	08	J06282	Rate Extension	P06282	ZJDE0001	Invalid DREAM Writer version	
G77A322	07	15	J07145	Calendar Month DBA's (F06145)	P07145		Invalid Form ID	
G77A322	07	18	J071461	Payroll Mo. Paytypes (F06146)	P071461		Program Not in *LIBL	
G31A11	31	20	J82001	Completed Order Valuation	Q31	ZJDE0010	Invalid Form ID	
G31A11	31	20	J82001	Completed Order Valuation	Q31	ZJDE0010	Invalid DREAM Writer version	
G31A11	31	21	J82001	Completed Order Variances	Q31	ZJDE0011	Invalid Form ID	
G31A11	31	21	J82001	Completed Order Variances	Q31	ZJDE0011	Invalid DREAM Writer version	
G31A11	31	22	J82001	Material Usage Variances	Q31	ZJDE0006	Invalid Form ID	
G31A11	31	22	J82001	Material Usage Variances	Q31	ZJDE0006	Invalid DREAM Writer version	
G31A11	31	23	J82001	Labor Efficiency Variances	Q31	ZJDE0007	Invalid Form ID	
G31A11	31	23	J82001	Labor Efficiency Variances	Q31	ZJDE0007	Invalid DREAM Writer version	
G31B	31	02	J3104	Schedule Revisions	P3104	ZJDE0001	Menu Message not found	
G31B	31	03	J3114	Schedule Workbench	P3114	ZJDE0001	Menu Message not found	
G31B	31	04	J31224	Scheduling Review	P31224	ZJDE0001	Menu Message not found	
G31B	31	05	J31223	Production History	P31223	ZJDE0001	Menu Message not found	
G31C	51	23	J82001	Work Estimate Summary Report	Q30	ETO 1	Invalid Form ID	
G31C	51	23	J82001	Work Estimate Summary Report	Q30	ETO 1	Invalid DREAM Writer version	
G521	52	15	J5201	Contract Master Revisions	P5201	ZJDE0001	Invalid DREAM Writer version	
G521	52	16	J5202	Owner Pay Item Details	P5202	ZJDE0001	Invalid DREAM Writer version	
G521	52	17	J5203	Contract Log Revisions	P5203	ZJDE0001	Invalid DREAM Writer version	
G5211	52	02	J52200	Owner Pay Item Status	P52200	ZJDE0001	Invalid DREAM Writer version	
G5211	52	05	J5203	Contract Log Revisions	P5203	ZJDE0001	Invalid DREAM Writer version	
G5221	52	02	J5211	Contract Pay Item Revisions	P5211	ZJDE0001	Invalid DREAM Writer version	
G77A302	77	19	J82001	Table Method Explanations	Q07	ZJDE0001	Invalid Form ID	
G77A302	77	19	J82001	Table Method Explanations	Q07	ZJDE0001	Invalid DREAM Writer version	

## Run Single File Conversions

If file conversions fail during UPG\_STEP2 or ALT\_STEP2 (in the reinstallation process), or PTF\_STEP2 (in the PTF installation process), you can run file conversions individually. From the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF), select Utilities. From the Upgrade Utilities menu, select Run Single File Conversions. Before you use this function, contact J.D. Edwards Worldwide Customer Support for assistance.

## Work with Technical Upgrade Notes

The technical upgrade notes provide you with useful information about the changes that have occurred in the new release or PTF level, including:

- Details about conversion programs that appear in the File Conversion Scheduler file (F97201)
- Changes in file lengths
- Members included in a specific PTF (PTFs only)
- New and obsolete jobs performed from menu selections
- Instructions for special application jobs
- New and obsolete programs
- Changes in the quantity or sequence of processing options in DREAM Writer versions

NOTE: A change in sequence can mean one of the following:

- The processing options for a version appear in a different order, or
- One or more of the processing options has been removed, and then others have been added, but the total number of processing options remains the same as before the change.
- SAR detail

You can view the notes on your screen or print them.

## Miscellaneous

To access the Display Tech Upgrade Notes screen, select Work With Tech Upgrade Notes from the Software Upgrade Menu (A97IBM).

96163	Display Tech Upgrade Notes					
Notes Types. . . : Systems. . . . : _____				From Release. . . <u>A62</u>	To Release. . . <u>A73</u>	
O Sys P Code	From Release	To Release	Ty	ID	Description	
— 00	A62	A73	FC 00	File Chg	FILE	CHANGE
— 04	A62	A73	FC 04	File Chg	FILE	CHANGE
— 07	A62	A73	FC 07	File Chg	FILE	CHANGE
— 09	A62	A73	FC 09	File Chg	FILE	CHANGE
— 11	A62	A73	FC 11	File Chg	FILE	CHANGE
— 12	A62	A73	FC 12	File Chg	FILE	CHANGE
— 13	A62	A73	FC 13	File Chg	FILE	CHANGE
— 15	A62	A73	FC 15	File Chg	FILE	CHANGE
— 32	A62	A73	FC 32	File Chg	FILE	CHANGE
— 40	A62	A73	FC 40	File Chg	FILE	CHANGE
— 47	A62	A73	FC 47	File Chg	FILE	CHANGE
— 48	A62	A73	FC 48	File Chg	FILE	CHANGE
— 52	A62	A73	FC 52	File Chg	FILE	CHANGE
— 77	A62	A73	FC 77	File Chg	FILE	CHANGE
— 81	A62	A73	FC 81	File Chg	FILE	CHANGE
4=Select 8=Print F2=Alternate Inquiry F14=Print Summary F21=Print Detail						

To display an alternate screen from which you can inquire on a specific program (in the Member ID field) and view all of the associated Software Action Requests (SARs), press F2 (Alternate Inquiry).

The following table explains the fields on the Display Tech Upgrade Notes screen.

FIELD	EXPLANATION	
Notes Types	The types of technical upgrade notes you want to list (up to four). Valid types include:	
	FC	File Changes. Indicates changes in file lengths.
	FS	File Scheduler Records. Provides details about conversion programs that appear in the File Conversion Scheduler file (F97201).
	MI	Members Included in PTF. Indicates all members included in a specific PTF.
	MJ	Menu Jobs to Execute. Indicates new and obsolete jobs performed from menu selections.
	MM	Menu Messages. Provides instructions for special application jobs.
	PC	Program Changes. Indicates new and obsolete programs.
	PO	Processing Options. Indicates changes in the quantity or sequence of processing options in DREAM Writer versions.
	SR	SAR Detail. Provides descriptions of SARs.

To list all notes, leave these fields blank.

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FIELD	EXPLANATION																		
Systems	The codes for the application systems for which you want to list notes (up to five). If you want to list notes related to all the applications you have on your machine, leave these fields blank.																		
Member ID (alternate inquiry screen only)	The program number (for instance, P0010) for which you want to list notes.																		
From Release (top part of screen)	The current release level of your J.D. Edwards software (for example, A62).  If you specify release levels in both this field and the To Release field, the screen lists notes for all release level combinations including the ones you specified and those in between. For example, if you specify you are upgrading from A5.2 to A7.3, your screen could list notes associated with the following releases:																		
	<table><thead><tr><th><u>From Release</u></th><th><u>To Release</u></th></tr></thead><tbody><tr><td>A52</td><td>A61</td></tr><tr><td>A61</td><td>A62</td></tr><tr><td>A62</td><td>A62PC00001</td></tr><tr><td>A62</td><td>A71</td></tr><tr><td>A71</td><td>A71PC00001</td></tr><tr><td>A71</td><td>A72</td></tr><tr><td>A72</td><td>A72PC00001</td></tr><tr><td>A72</td><td>A73</td></tr></tbody></table>	<u>From Release</u>	<u>To Release</u>	A52	A61	A61	A62	A62	A62PC00001	A62	A71	A71	A71PC00001	A71	A72	A72	A72PC00001	A72	A73
<u>From Release</u>	<u>To Release</u>																		
A52	A61																		
A61	A62																		
A62	A62PC00001																		
A62	A71																		
A71	A71PC00001																		
A71	A72																		
A72	A72PC00001																		
A72	A73																		
	NOTE: For note type MM (menu messages) only, if you specify values in both the From Release and To Release fields, the screen lists only notes that match these release levels.																		

## Miscellaneous

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FIELD	EXPLANATION																		
To Release (top part of screen)	The release or PTF level to which you want to upgrade your software (for example, A73 or A73PC00001).  If you specify a PTF level in this field, but leave the From Release field blank, the screen lists notes that apply to the PTF only. For example, if you specify you are upgrading to PTF A73PC00001, your screen could list notes associated with the PTF:  <table><tr><td><u>From Release</u></td><td><u>To Release</u></td></tr><tr><td></td><td>A73PC00001</td></tr></table> NOTE: For note type MI (members included) only, the screen lists only notes that are specific to the PTF.	<u>From Release</u>	<u>To Release</u>		A73PC00001														
<u>From Release</u>	<u>To Release</u>																		
	A73PC00001																		
	If you specify release levels in both this field and the From Release field, the screen lists notes for all release level combinations including the ones you specified and those in between. For example, if you specify you are upgrading from A5.2 to A7.3, your screen could list notes associated with the following releases:  <table><tr><td><u>From Release</u></td><td><u>To Release</u></td></tr><tr><td>A52</td><td>A61</td></tr><tr><td>A61</td><td>A62</td></tr><tr><td>A62</td><td>A62PC00001</td></tr><tr><td>A62</td><td>A71</td></tr><tr><td>A71</td><td>A71PC00001</td></tr><tr><td>A71</td><td>A72</td></tr><tr><td>A72</td><td>A72PC00001</td></tr><tr><td>A72</td><td>A73</td></tr></table>	<u>From Release</u>	<u>To Release</u>	A52	A61	A61	A62	A62	A62PC00001	A62	A71	A71	A71PC00001	A71	A72	A72	A72PC00001	A72	A73
<u>From Release</u>	<u>To Release</u>																		
A52	A61																		
A61	A62																		
A62	A62PC00001																		
A62	A71																		
A71	A71PC00001																		
A71	A72																		
A72	A72PC00001																		
A72	A73																		
	NOTE: For note type MM (menu messages) only, if you specify values in both the From Release and To Release fields, the screen lists only notes that match these release levels.																		
OP (Option)	If you specify a 4 in this field, the information for the selected note is displayed. If you specify an 8, the information for the selected note is printed.																		
Sys Code	The code that identifies the application system to which the note is assigned.																		
From Release	The release level of J.D. Edwards software this note assumes you are at currently.																		
To Release	The release or PTF level this note assumes you are upgrading to.																		
Ty (Type)	The note type (for example, FC for file changes).																		

FIELD	EXPLANATION
ID	The identifying name of the particular note. The following note IDs are examples of each note type.
00 File Chg	File Changes (FC). Contains file change information for system 00.
J000671	File Scheduler Records (FS). Contains details about the J000671 program that converts file F0006.
00 Mbrs Inc	Members Included in PTF (MI). Contains all members included in a specific PTF for system 00.
00 Menu Job	Menu Jobs to Execute (MJ). Contains a list of new and obsolete jobs for system 00 that are performed from menu selections.
G97U1 02	Menu Messages (MM). Contains instructions for the special application job that appears as selection 2 on the G97U1 menu.
00 Pgm Chg	Program Changes (PC). Contains a list of new and obsolete programs for system 00.
00 Proc Opt	Processing Options (PO). Contains a list of DREAM Writer IDs for system 00 for which the processing options have changed in quantity or sequence.
00345957	SAR Detail (SR). Contains the description of SAR 00345957.
Description	The note description.

To print the notes in summary, press F21 (Print Summary) with the following guidelines.

- If you specified system codes in the Systems fields on the Display Tech Upgrade Notes screen, F21 prints the notes associated with those systems regardless of whether you have them installed on your system.
- If you specified SR in one of the Notes Types fields, F21 prompts you to indicate whether you want to include members that are affected for SARs in the report. If you enter Y (Yes), the members that are affected by a particular SAR appear with the SAR number on the report.

To print the notes in detail, press F14 (Print Detail).

**IMPORTANT:** J.D. Edwards recommends that you specify the systems and the note types for which you want notes printed. If you leave the Systems and Notes Types fields blank, your print output could be very large.

## Start or End the J.D. Edwards Monitor (JDEMONITOR)

If you need to end the J.D. Edwards Monitor to do backups or an IPL, you can type ENDJDEMON from the Software Upgrade Menu (A97IBM), which can be accessed only by signing on as JDEINSTAL. You can also do this by selecting Utilities from the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF), and then selecting End JDE Monitor from the Upgrade Utilities menu.

If you have not completed Phase 5 of the *Reinstall Workbook* or the *PTF Install Workbook*, you must start the J.D. Edwards Monitor again. To start the J.D. Edwards Monitor, either type STRJDEMON from the Software Upgrade Menu (A97IBM), which can be accessed only by signing on as JDEINSTAL. You can also do this by selecting Utilities from the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF), and then selecting Start JDE Monitor from the Upgrade Utilities menu.

## Install Source Only

NOTE: Before you perform this procedure, you must perform the LODRUN procedure from the tape you received with your shipment.

To install source only:

1. Sign on as JDEINSTAL. The Software Upgrade Menu (A97IBM) appears.
2. Select Work With Upgrade Planner. The Plan the Upgrade screen appears.
3. In the Action Code field, type I (Inquire).
4. In the Plan Name field, type the name of the upgrade plan you used to install or upgrade the environment in which you now want to install source. Press Enter.
5. In the Action Code field, type A (Add).
6. In the Plan Name field, type a name for the new upgrade plan you will use to install source only.
7. In the Description field, type a description for this new plan. Press Enter.
8. In the Plan Name field, type the name of the upgrade plan you added and press Enter.
9. Press F5 to enter upgrade data. The Libraries for This Plan screen appears.
10. If your upgrade plan does not have a SRC library type, you must add one.
11. In the Install Source Library field, type 1.
12. In the Install Object/Data Libraries field, type 0.

13. Press Enter twice.

NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

```
96003X      Reinstall Language Exception

Plan Name: ZJDE_ALT
Coded Character Set (CCSID) mismatch

Data Dictionary file (F9201) CCSID . . . : 00285
Dream Writer file (F98301) CCSID . . . : 00037
QCHRID System Value CCSID. . . . . : 00037

Reinstall must use CCSID other than 65535.

Please enter CCSID value to use. . . . : 00285

Enter=Continue F3=Exit
```

The Systems to Install/Upgrade screen appears.

14. Verify that the systems for which you will install source are the same ones for which you already installed object and data. If you change this screen, press Enter.
15. Do not change any other upgrade planner screens, but press F3 (Exit).
16. From the Software Upgrade Menu (A97IBM), select Start the Upgrade. The JDE Upgrade Command (JDEUPGRADE) screen appears.

JDE Upgrade Command (JDEUPGRADE)		
Type choices, press Enter.		
Upgrade Type . . . . .	_____	*PTF, *INSTALL, *REINSTALL...
Plan Name . . . . .	_____	From Upgrade Planner
+ for more values		
Source Media . . . . .	_____	Tape Device Name, *DISK
Current JDE Release Level . . .	_____	From Upgrade Planner
New JDE Release Level . . . .	_____	From Upgrade Planner
Run Validator Program . . . .	1	1=Yes, 0=No
JDE PTF Library . . . . .	*NONE	*NONE, Library Name
Hold Install Job on Job Queue .	0	1=Hold on JOBO, 0=Do not hold
PTF Step Option . . . . .	0	0=Both 1=Step One 2=Step Two

17. In the Upgrade Type field, enter \*INSTALL or \*PTF, whichever is appropriate.

One or more of the highlighted fields shown above appear on your screen depending on whether you specify \*INSTALL or \*PTF in the Upgrade Type field.

18. In the Plan Name field, type the name of the upgrade plan you set up to install source only.
19. Verify that the values in the Current JDE Release Level and New JDE Release Level fields match those that are in the upgrade plan.
20. If you are upgrading to a PTF level, you must type the name of the PTF library (for example, A73PC00001) in the JDE PTF Library field. This name must be the same as you typed in the New JDE Release Level field. To avoid an error, do not blank this field out or leave it set to \*NONE.

You also must set the PTF Step Option field to 0 (Run Both).

21. Leave the value in the Hold Install Job on Job Queue set to 0.
22. Press Enter.

The INS\_STEP1 and INS\_STEP2 jobs (for install), or the PTF\_STEP1 and PTF\_STEP2 jobs (for PTFs), submit to batch.

23. After these jobs complete, you must run the Software Versions Repository merge. For information about how to run this merge, see *Merges and Control Files (Reinstallations Only)* in this publication.

NOTE: If you are a new client and you have not created your production libraries, do not run the Software Versions Repository merge.