

PeopleSoft®

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EnterpriseOne  
Product Packaging 8.9  
PeopleBook

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EnterpriseOne  
Product Packaging 8.9 PeopleBook  
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## Overview

This guide explains how to use the Product Packaging Tools to create a software master image of ERP 9.0 objects.

In this section, you will find relevant definitions for product packaging, a process overview, and prerequisites that are required to use the tools. The remainder of the guide describes how to use the tools to create your own software master, which can be installed on to any enterprise that contains an ERP 9.0 installation at the same release level.

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### Note

For the complete list of tasks on how to create a software master from start to finish, see *Software Master Creation* in the *Product Packaging Guide*.

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This guide details the different aspects of software masters and the Product Packaging Tools, such as the software master definition, change table configurations, and the final software master.

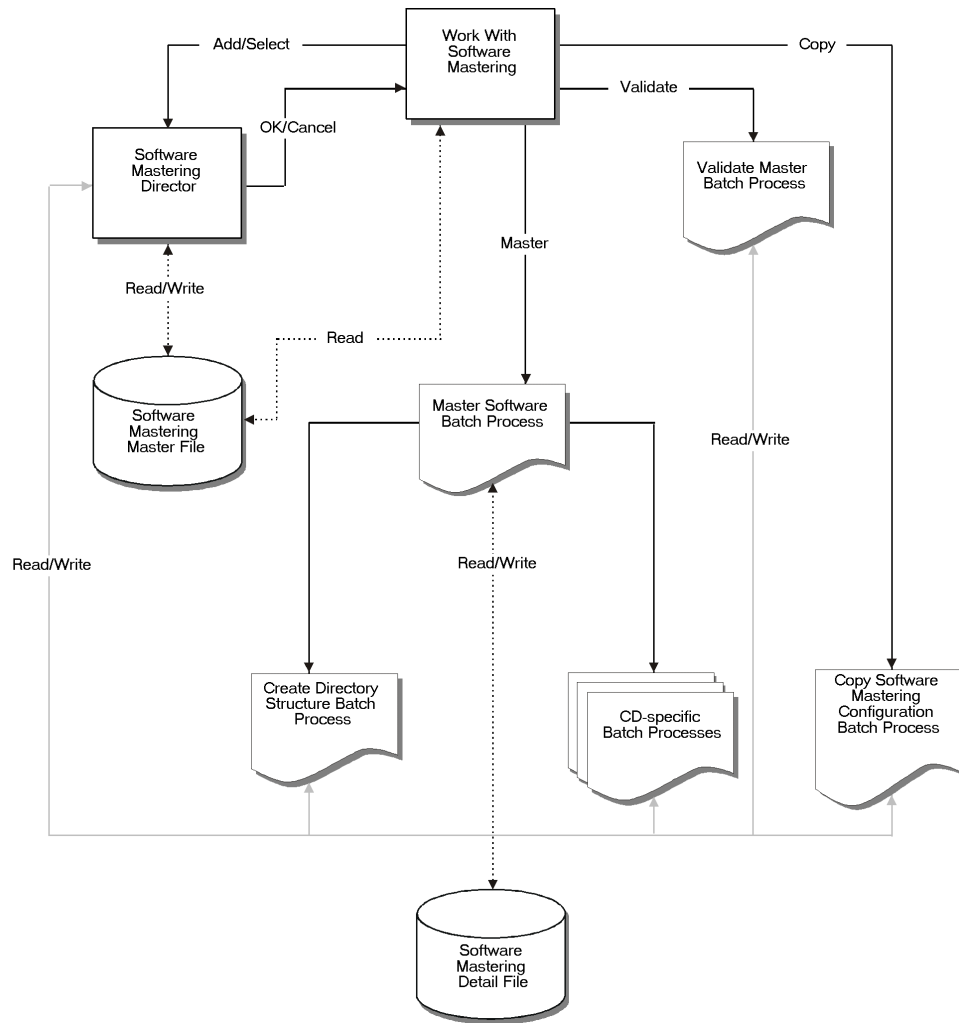
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## Product Packaging Definitions

Product Packaging is the ability to master and package a group of ERP 9.0 objects. It provides customers a mechanism to move objects from Central Objects and Control Tables from one location to another. PeopleSoft business partners can use the Product Packaging Tools to develop and market software modules that are based in ERP 9.0. In addition, customers who modify ERP 9.0 can use the Product Packaging Tools to deliver changes to other locations within their company that are not directly connected to the central enterprise.

The Product Packaging Tools manage the task of mastering ERP 9.0 software. In this capacity, the tools oversee the entire mastering process from defining a software master to mastering the CD. The tools start with the definition process, where the user provides as much information as possible up front. After the user enters the critical information, the tools provide a batch process to validate the software mastering information before mastering. Next, the tools provide a batch process to master the software. Finally, the tools provide a batch process to validate the final software master image.

The following graphic details the product packaging flow:



To better understand the overall process, you should be familiar with the following key terms and processes:

**Software Mastering Director** This director provides ERP 9.0 administrators with the ability to build a mastered version of ERP 9.0 objects or modules. The director handles this functionality through a series of batch processes and manual tasks that build all of the components of an ERP 9.0 master. The final product is an image of the product, in a tree format, that they can burn on to a CD.

**Change Table Configuration Director** This director provides ERP 9.0 administrators with the ability to define how to build the software master's change tables.

**Distributed Development** Distributed development refers to the ability to perform development using one installation of ERP 9.0 and deploying that development to another installation of ERP 9.0.

For example, a developer in Paris could create new objects using the Paris installation of ERP 9.0. An ERP 9.0 administrator in Paris could then use the Product Packaging Tools to create a CD that includes these new objects. This CD could then be shipped to London, where an administrator updates the London installation of ERP 9.0, assuming both installations are at the same ERP 9.0 release level. The Product Packaging Tools described in this guide provide this functionality.

This ability should not be confused with remote development, which is the creation of ERP 9.0 objects by a developer who is completely disconnected from any ERP 9.0 installation. The developer could connect to an ERP 9.0 installation at a later time and merge those objects.

## Prerequisites

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This guide is designed for Management Information Systems (MIS) managers and administrators of ERP 9.0. Success depends upon your understanding of the relevant concepts and procedures. The recommended method for obtaining this information is to attend training courses; information about course offerings, dates, and locations is available at the J.D. Edwards Web site. At a minimum, read the following guides before you begin:

- ERP 9.0 Foundation Guide
- Configuration Planning and Setup Suite:
  - Configurable Network Computing Implementation Guide
  - System Administration Guide
  - Package Management Guide
  - Server and Workstation Administration Guide

## Conventions

---

The following conventions are used in this guide.

### MSDE Database

Currently, the J.D. Edwards Supported Local Database is in the Microsoft SQL Server Desktop Engine (MSDE). Throughout this document, whenever *MSDE database* is mentioned, it refers to the J.D. Edwards Supported Local Database. The repository for this local database is likely to change in the future.

### Fonts

Italic font designates variables used in the guide. For example, if you see the variable *deploymentserver* in a command you must enter, substitute the phrase *deploymentserver* for the actual name of your deployment server. Also, the names of other J.D. Edwards ERP 9.0 guides are in italic font. For example, the *ERP 9.0 Installation Guide*.

Courier font designates commands or other information that you must type into the system. For example:

Type the name of the environment, such as DEVTEMP.

---

## Software Master Creation

This topic explains the steps involved in creating a software master. Use the checklist for creating a software master to ensure that you complete all of the processes necessary.

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### Checklist for Creating a Software Master

---

Use the following checklist to ensure that you complete all of the processes necessary for creating a software master.

1. Ensure that at least 1 GB of space is available for the TEMP directory of the workstation from which you use the Product Packaging Tools. This memory requirement is the most memory you might need for a software master. The actual size of the master depends on the size of the package you create.
2. Complete the tasks in this section.
3. Define a software master using the CD Configuration Director:
  - Provide information about the type of master you want to create, such as its name, release number, and so on.
  - Choose the package you want built into the master.
4. Configure change tables using the Change Table Director:
  - Provide the target release number for the change tables.
  - Provide source environment information about the change tables.
  - Choose the change tables and their versions.
5. Validate the software master definition.
6. Create the final software master, which automatically validates the master.
7. Use the software master to update ERP 9.0

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### Prerequisites for Creating a Software Master

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You perform the following tasks to enable the Product Packaging Tools. These tasks are one-time processes. After completing them for the first time, you will not need to perform them again.

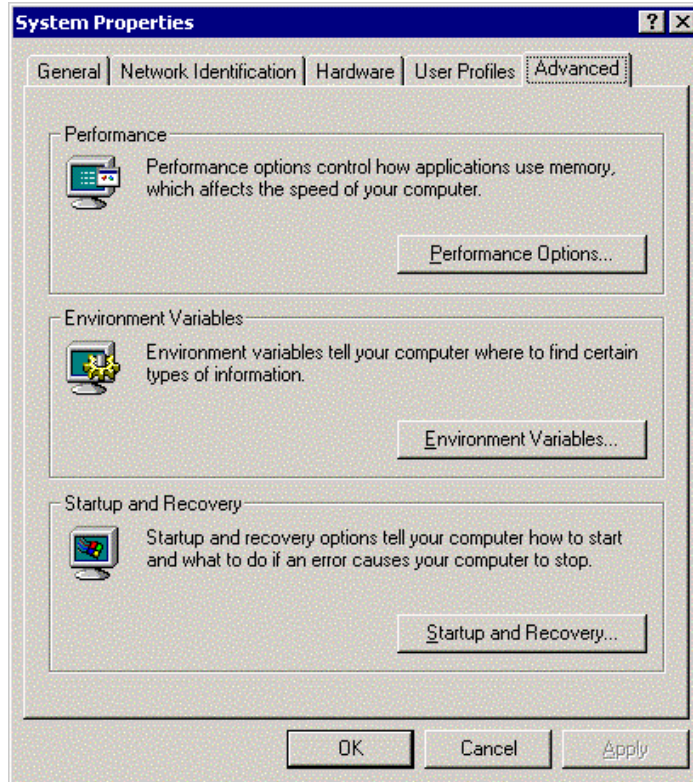
#### Setting Up the System TEMP Directory

This task creates a temporary directory that will be used to store the J.D. Edwards Supported Local Database (in MSDE) for mastering the Product Packaging CD.

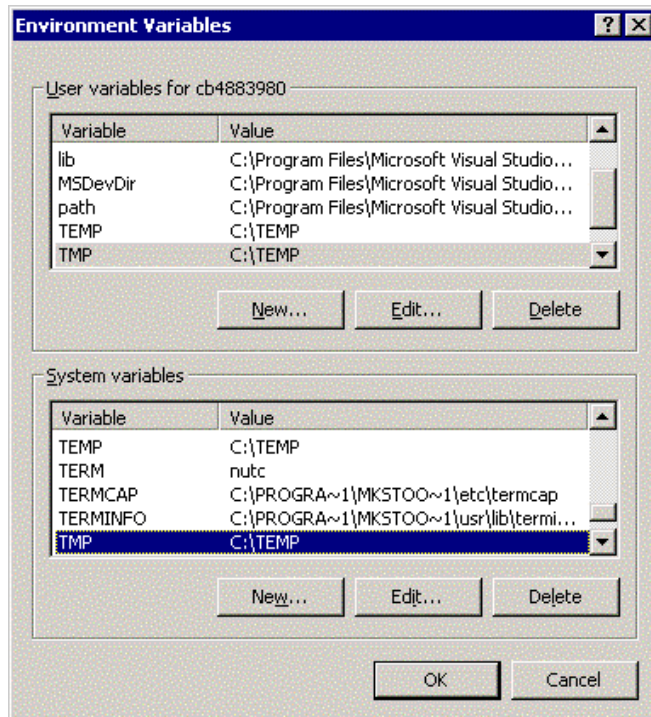
► **To set up the System TEMP directory**

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1. From your Windows desktop, choose Start, then Settings, and then Control Panel.
2. On Windows Control Panel, double-click the System icon.
3. On System Properties, click the Advanced tab.



4. Double-click Environment Variables.



5. Set the TEMP and TMP variables for both the User and System settings so they all access the same directory (for example, c:\TEMP).

---

**Note**

Ensure that the windows temp directory on the workstation has at least 1 GB free disk space available (the more space the better). If the temp directory has less than 1 GB of free space, you can create a temp directory on another disk drive with adequate space and set the system environment variables TEMP and TMP to point to the new temp folder. Reboot your system for the change to take effect.

---

This directory will store the Software Master you create in the following tasks.

## Creating Pristine Control Tables

For Control Table changes to be included on an update CD, the Product Packaging tool requires a pristine copy of the Control Tables. If your ERP 9.0 installation includes the JD9 Pristine Environment, these tables already exist in your ERP 9.0 instance and you can skip the following task. If, however, your installation does not include the pristine environment, you can create a set of pristine Control Tables by copying the Control Table tables from OneWorld Local to a new data source: Control Tables - JDE. You perform this process only once.

---

**► To create Pristine control tables**

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*On the Deployment Server, log on to ERP 9.0 in the DEP9 environment.*

*From menu GH9011, choose Batch Versions.*

1. Type R98403 in the Batch Application field and click Find.
2. On Work With Batch Versions – Available Versions, choose version XJDE0501 (Control Tables For Pristine Database), and choose Processing Options from the Row menu.
3. Click the Environment tab and change the following processing options:
  - Target Environment (option 1)  
Leave this field blank.
  - Target data source (option 2)  
Enter Control Tables - JDE
  - Data Load (option 3)  
Enter 2 to copy data to the table.
  - Source data source (option 4)  
Enter OneWorld Local.
4. Run the version locally.

The report copies the F0004, F0004D, F0005, F0005D, F0082, F00821, F0083, F0084, F91100, F91100D, F91400, F91410, F91420, F91430, F91500, and F91510 tables from the JDELocal.mdf database to Control Tables - JDE.

5. Verify the results of the report and the creation of the tables.
6. Exit the Batch Versions application.
7. From menu GH9011, choose Object Configuration Manager.
8. On Machine Search and Select, choose the machine with the System - B9 data source.
9. For the JD9 environment, add Object Configuration Manager (OCM) mappings for tables F0004, F0004D, F0005, F0005D, F0082, F00821, F0083, F0084, F91100, F91100D, F91400, F91410, F91420, F91430, F91500, and F91510, and assign these new tables to the Control Tables - JDE data source.
10. Activate the new mappings.
11. Exit Object Configuration Manager.

## **Verifying the Data Source configuration for Product Packaging**

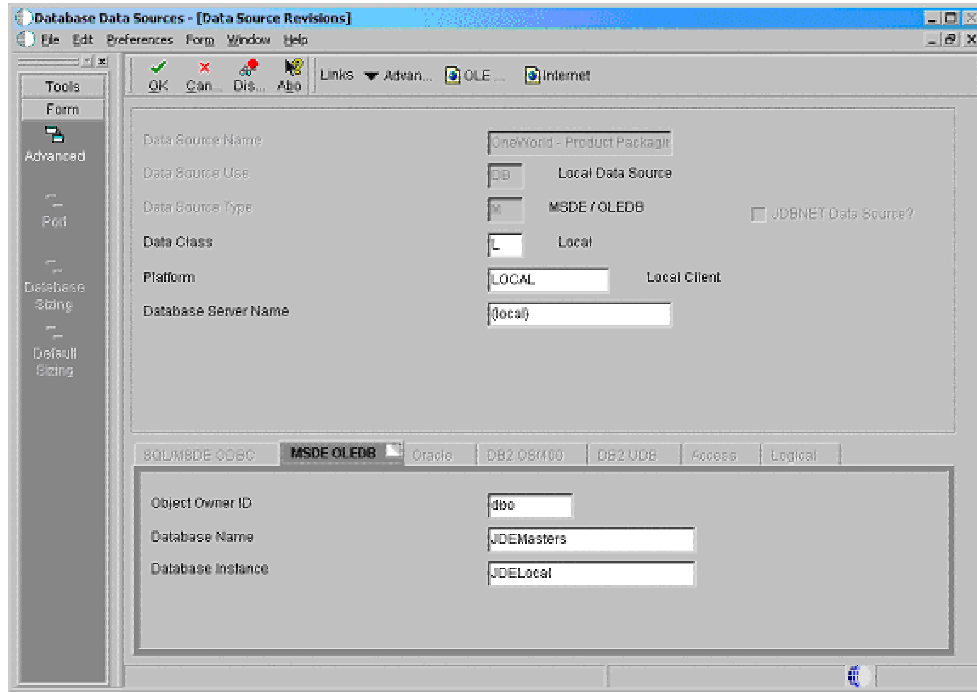
The Product Packaging process creates an MSDE database in the TEMP directory on the workstation on which the Product Package CD image is mastered. This database is used to store data that will be mastered on the CD. To copy tables into this database, you must verify that the OneWorld - Product Packaging data source and the Data Dictionary - JDE data source are properly configured on the Deployment Server.

### **► To verify the Product Packaging data source**

---

*From the Deployment Server, log on to ERP 9.0 in the DEP9 environment and type GH9011 in the Fast Path.*

1. Double-click Database Data Sources (P986115).
2. On Machine Search & Select, choose the machine with the System - B9 data source.
3. On Work With Data Sources, click Find.
4. Choose the OneWorld - Product Packaging data source.



5. On Data Source Revisions, verify that the OneWorld - Product Packaging data source is defined with the following values:
  - Data Source Name: OneWorld - Product Packaging
  - Data Source Type: M - MSDE/OLEDB
  - Database Name: JDEMasters
 If this name is different, change it to the above value.
6. Click OK, and exit the Data Source application.

## Creating a Data Dictionary in the Pristine Data Source

You need to create a data dictionary in your ERP 9.0 Pristine data source; this is a one-time process. After creating these tables, you will not need to create them again.

### ► To create a data dictionary in the Pristine data source

*From the deployment server, log on to the JDEPLAN environment. Use JDE as your user name and JDE as your password.*

*From the System Administration Tools (GH9011) menu, choose Batch Versions.*

1. On Work With Batch Versions - Available Versions, type R98403 into the Batch Application field and click Find.
2. Choose version XJDE0509 and click Copy.
3. On Version Copy, enter a new version name and a new version title, and then click OK.

4. On Work With Batch Versions - Available Versions, choose the version you just created and, from the Row menu, choose Processing Options.
5. Complete the following processing options:
  - Target data source (option 2)  
Type DATA DICTIONARY - JDE.
  - Source environment (option 5)  
Type JDEPLAN.

These processing options set up the batch process to copy the data dictionary tables from JDEPLAN environment to the new Pristine data dictionary.

6. Set the version you just created to run in the proof mode first.
7. Run this report locally, not on the enterprise server.
8. Verify the results of this report.
9. When satisfied with the proof mode results, run the version you just created in final mode.
10. Run OCM from the Fast Path and choose the enterprise server.
11. For the JD9 environment, add OCM mappings for F00165, F9200, F9202, F9203, F9207, F9210, F9211, and F9212 that point these tables to Data Dictionary - JD9.
12. Activate the new OCM mappings.

## Creating Change Tables

Product packaging requires that a set of tables, called change tables, exist and be mapped to the Control Tables - <environment> data source. A change table is a table that contains the items that have changed between releases or updates. Normally, these tables are generated during the installation process, when you run the environment workbench. If, however, the environment is populated with demo data, these tables will not be generated even though the environment workbench reports that they were created successfully.

Complete the following tasks if you need to create change tables in the mastering environment.

### ► To create change tables

---

This task must be completed once to initially build the change tables.

*On the Deployment Server, log on to the DEP9 environment in ERP 9.0.*

*From menu GH9011, choose Batch Versions.*

1. Type R98403 in the Batch Application field and click Find.
2. Choose version XJDE0507 (Change Table) and click Copy.
3. On Version Copy, complete the following fields:
  - New Version  
CREATECT

- Version Title  
Type a name for the new version.
4. Click OK.
  5. On Batch Version Design, click the Processing Options button on the General tab.
  6. Edit the following processing options for CREATECT:
    - Target Environment (option 1)  
Type the name of the mastering environment.
    - Target Data Source (option 2)  
Leave this field blank.
    - Data Load (option 3)  
Enter 1 - Load Production, to create the table without data.
    - Source data source (option 4)  
Enter OneWorld Local.
  7. Click OK.
  8. On Batch Version Design, click Run.
  9. On Version Prompting, choose Data Selection and click Submit.
  10. On Data Selection, verify that the following tables are listed in the right operand for BC OBNM, and add those that are missing:

F960004	F9691100	F9698710	F98800TN
F960005	F9691400F	F9698712	F98810DN
F967611	9691410	F9755	F98810N
F969000	F9691420	F9757	F98811N
F969001	F9691430	F9759	F98830N
F969002	F9691500	F9760	F98840N
F969005	F9691510	F98800DN	F98845N
F969006	F969861	F98800N	

11. Run the version.

The program creates your change tables in Control Tables - CRP, or whichever environment Control Table data source you specified.

#### See Also

- *Working with a Software Master Definition* in the *Product Packaging Guide* for other features of this form

► **To verify the creation of change tables**

---

For each of the change tables, you should verify that an OCM mapping exists and points to the appropriate data source for the mastering environment.

*From menu GH9011, choose Object Configuration Manager.*

1. On Machine Search and Select, choose the machine with the System - B9 data source.
2. For the mastering environment, verify that each of the following change tables is mapped to the correct data source, and that each of the mappings is activated:

<b>Change Table</b>	<b>Data Source</b>
F960004, F960005, F969000, F969001, F969002, F969005, F969006, F98800DN, F98800N, F98800TN, F98810DN, F98810N, F98811N, F98830N, F98840N, F98845N	Control Tables - <environ ment>
F969861, F9698710, F9698712	Central Objects - <environ ment>
F967611, F9691100, F9691400, F9691410, F9691420, F9691430, F9691500, F9691510,	System - B9
F9755, F9757, F9759, F9760	Data Dictionary - B9

3. Exit OCM.
4. Run Universal Table Browser (UTB) to verify that the tables were created in the correct location.

## **Creating a Software Master**

---

This topic explains how to create a software master from start to finish. Use the checklist cited below to ensure that you complete all of the tasks.

---

### **Note**

See the *Checklist for Creating a Software Master* in the *Software Master Creation* chapter of the *Product Packaging Guide*.

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## Defining a Software Master

This task explains how to use the CD Configuration director to define a software master.

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### Note

If you have already defined a software master and you need to revise the definition, see *Revising a Software Master Definition* in the *Product Packaging Guide*.

---

A software master definition provides the structure for your finished software master. It establishes what template and packages to use, what build steps to follow, and the directory structure of your final master. The software master definition is only the structure or outline of the master. Once you set up your software master definition, you validate it and then create the actual software master.

## Including Custom Data in the Software Definition

The Product Packaging application allows you to include custom data on the software master. Read the following tips for including custom tables and media objects on the software image.

### Including New Tables

If a new table is to be delivered with pristine data, the mastering process should automatically handle this procedure if the following conditions are met:

- The table is included in the update package.
- The table is in the environment of the update package.
- The table is not included in the target environment.
- The table and index change table exists.

After the mastering process is complete, the table should be in the JDEmasters database referenced by the OneWorld – Product Packaging data source you set up earlier. In addition, records should exist in the table and index change table for the new custom table.

### Including Custom Media Objects

To include custom media objects in the product package, add the following build steps to the ASU template:

1. Add a build step to copy table records from the Media Objects Storage (F00165) table to the JDEmasters database.
2. Add a build step to copy the media object files from the deployment server to the image path directory.

### See Also

- *Revising a Software Master Template* in the *Product Packaging Guide* for more information about adding build steps

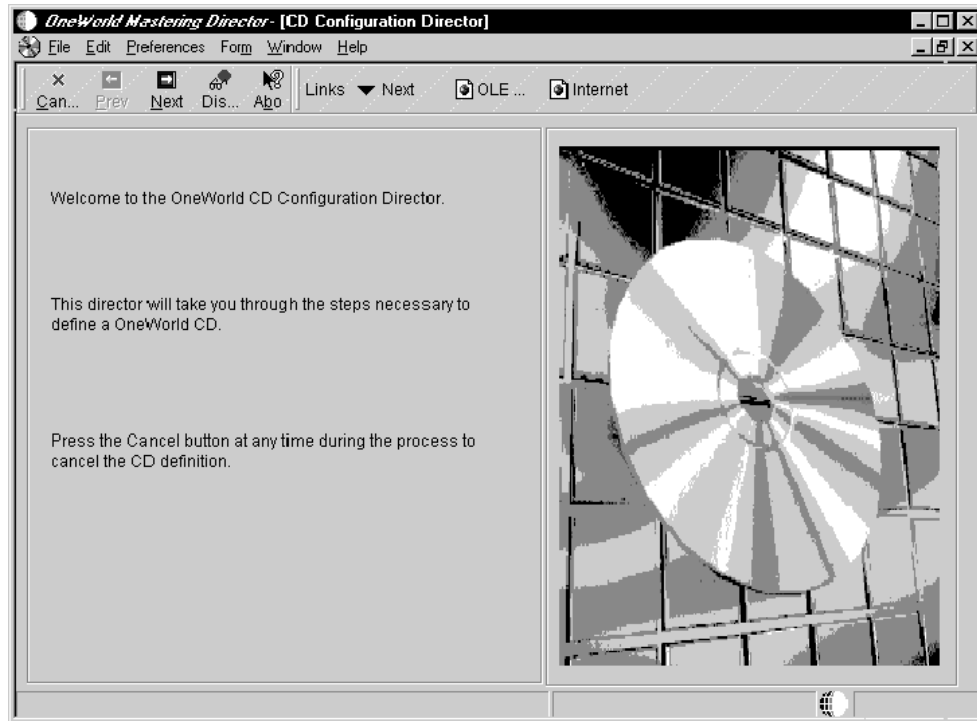
► **To define a software master**

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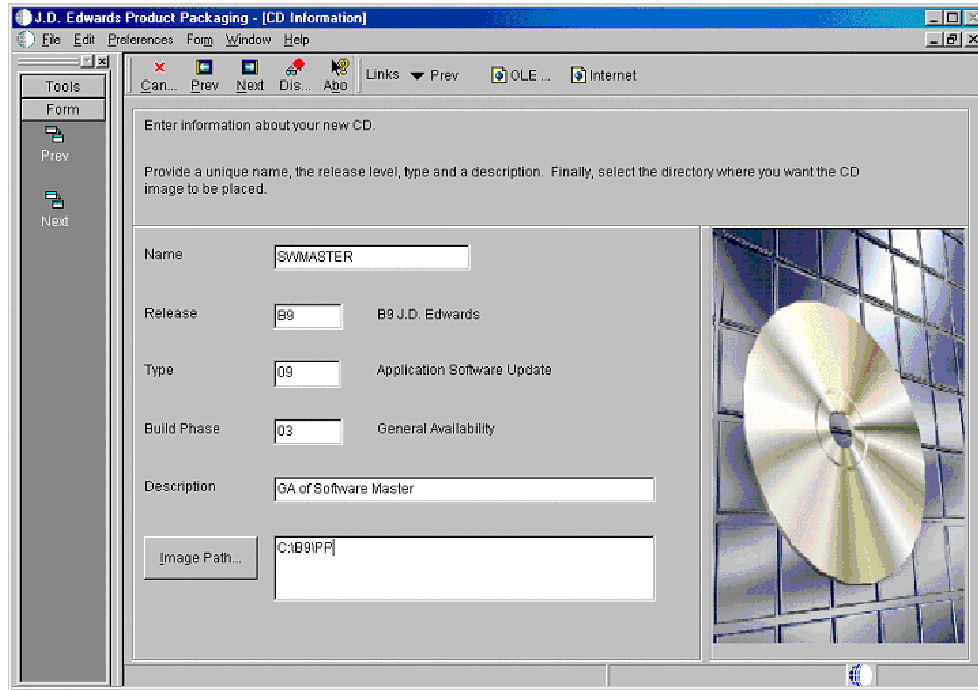
*Log on to an ERP 9.0 workstation using the development environment where your modifications exist, such as DV9.*

*From Product Packaging (GH962), choose Product Packages/J.D. Edwards Product Packaging (P9640).*

1. On Work With Software Mastering form, click Add.



2. On CD Configuration Director, click Next.



3. On CD Information, complete the following fields:

- Name

Enter a unique name for the software master definition you are adding, such as B9 UPDATE. This name must exactly match the name of the package to be included, and must be in all UPPERCASE letters.

- Release

Enter the ERP 9.0 release for the software master definition, such as B9. This is the release currently installed on the client workstation you are using.

- Type

Specify the type of CD you want to master. In this case, it is an ASU CD (option 9), which is the ERP 9.0 default. If you choose an option other than 09, ERP 9.0 displays an error message when you press the Next button. This field indicates which software template to use when you further define the master. Templates include the build steps and directory structure necessary to create a software master.

---

**Note**

For information about templates, see *Software Master Templates* in the *Product Packaging Guide*.

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- Build Phase

Enter the development phase that your software master definition represents, such as an alpha, beta, or general availability.

- Description

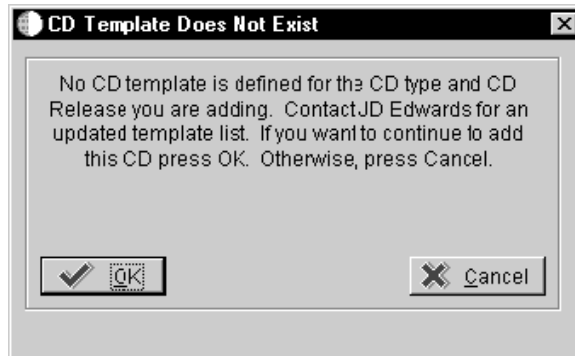
Optional. Enter a description of the software master definition.

- Image Path

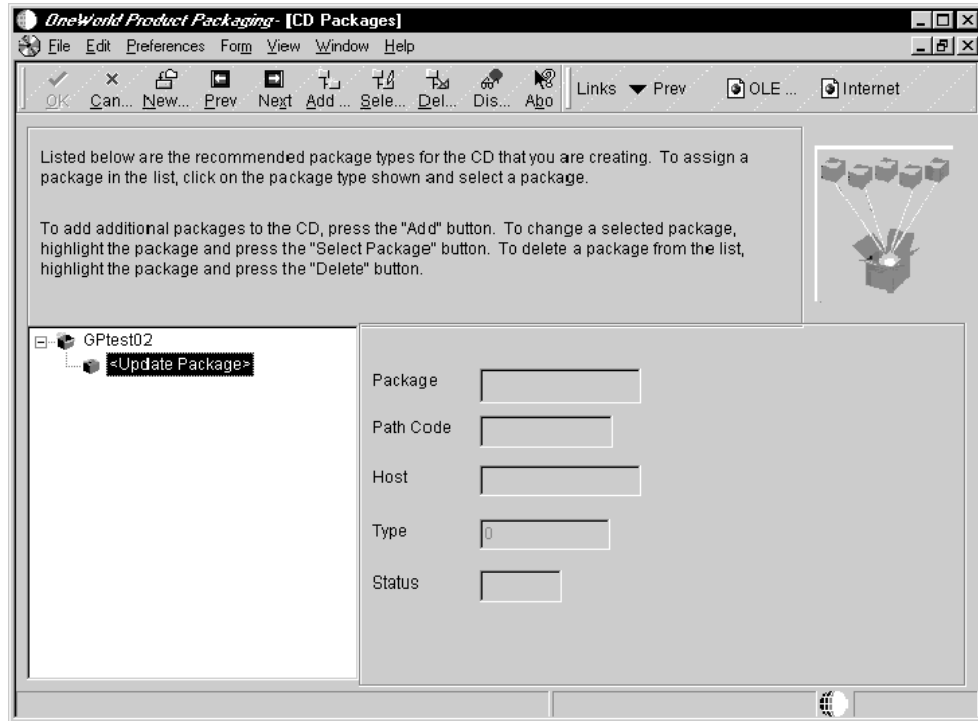
Enter the directory path where you want your software master definition to reside on the Product Packaging build machine (for example, `d:\b7\PP`). If the directory does not exist, ERP 9.0 will create it for you when you run the software mastering process. The directory you indicate will be the root directory for the software master you create. It will contain the contents of your master. Once you create the image, the CD can be burned through the CD burner software.

4. Click Next.

If you chose a template that appears on the list of values when you click the visual assist button from the Type field but the template is not on your enterprise, the CD Template Does Not Exist form appears. You have probably entered the incorrect release number. Click OK to continue adding your software master definition, or click Cancel to stop adding the definition.



If the template you chose via the Type field was set up to include packages, the CD Packages form appears.



5. Choose the update package that includes the objects for the update disk. You can either choose an existing update package or create a new one.

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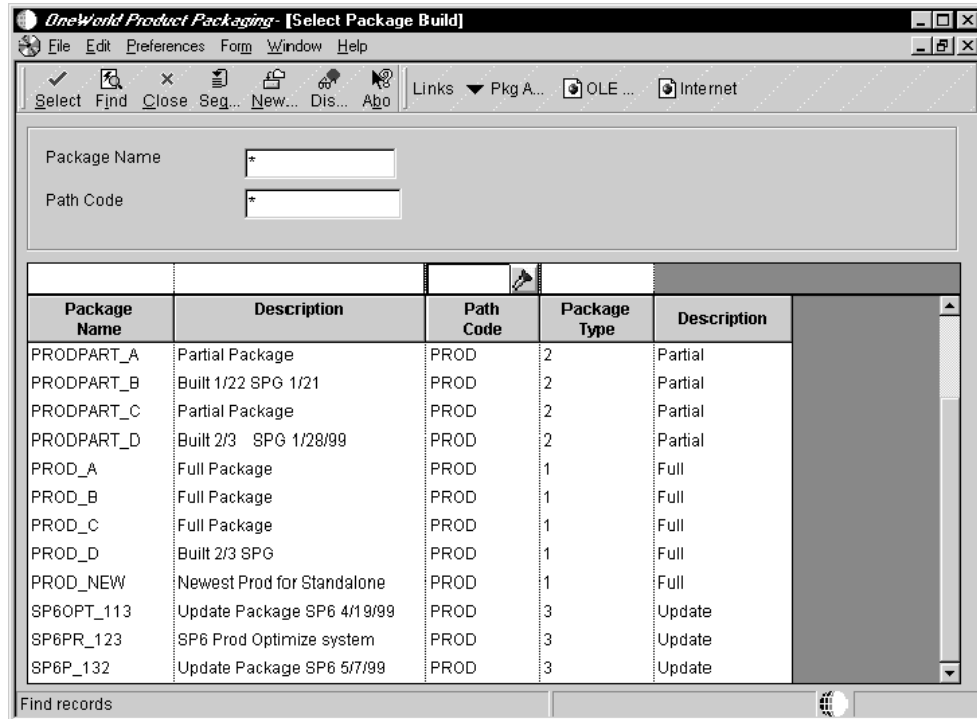
**Note**

To ensure that the update package is defined correctly, note the following:

- Use only update packages for this process.
  - The package name must be the same name as the product package previously defined, and must be all UPPERCASE letters.
  - The package should be created from its very beginning.
  - The update package must always include specifications, build specifications, build business functions, and compression. If the package is not compressed, then product packaging will not work correctly because Product Packaging only looks for cab files to copy to your image.
  - Ensure that the package build is activated and ready for build. For further information, refer to the *Package Management Guide*.
- 

6. If the package is undefined, the Select Package Build form automatically appears; otherwise, click Select Package.

You can also add packages by clicking New Package Build or Package Assembly.



7. On Select Package Build, if you need to assemble or define a package or both, choose one of the following from the Form menu:
  - Pkg Assembly
  - Pkg Build

---

**Note**

Make sure that you compress any packages that you build.

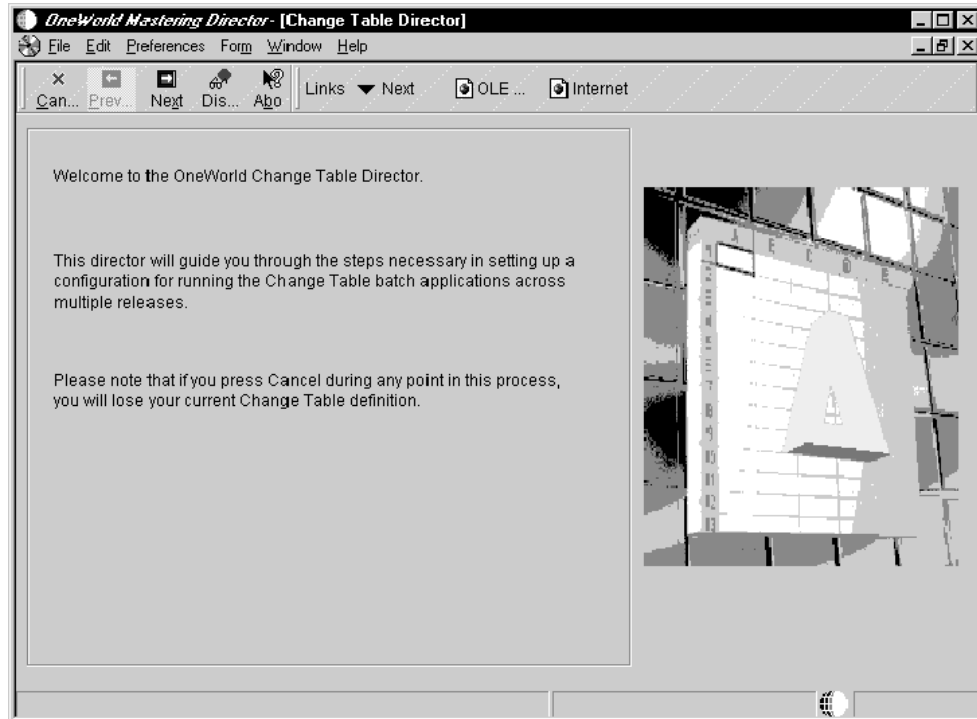
For procedures to assemble and build packages, see the *Package Management Guide*.

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8. On the Select Package Build form, find and choose a package, and then click Select.
9. On CD Packages, choose the package marker that appears.  
For an ASU CD, only one package is required. For other types of software masters, more than one package might be required.

10. Click Next.

After you click Next, and if the template you chose was set up to include change table configurations, the Change Table Director form appears.



11. Continue to the next task, which explains how to configure your change tables.

## Configuring Change Tables

This task explains how to set up a change table configuration using the Change Table director. Create change table configurations to indicate to the Product Packaging tools the change tables you want included with the software master. When you install the finished software master, the installation process will update the control tables of the enterprise with the change tables you indicate.

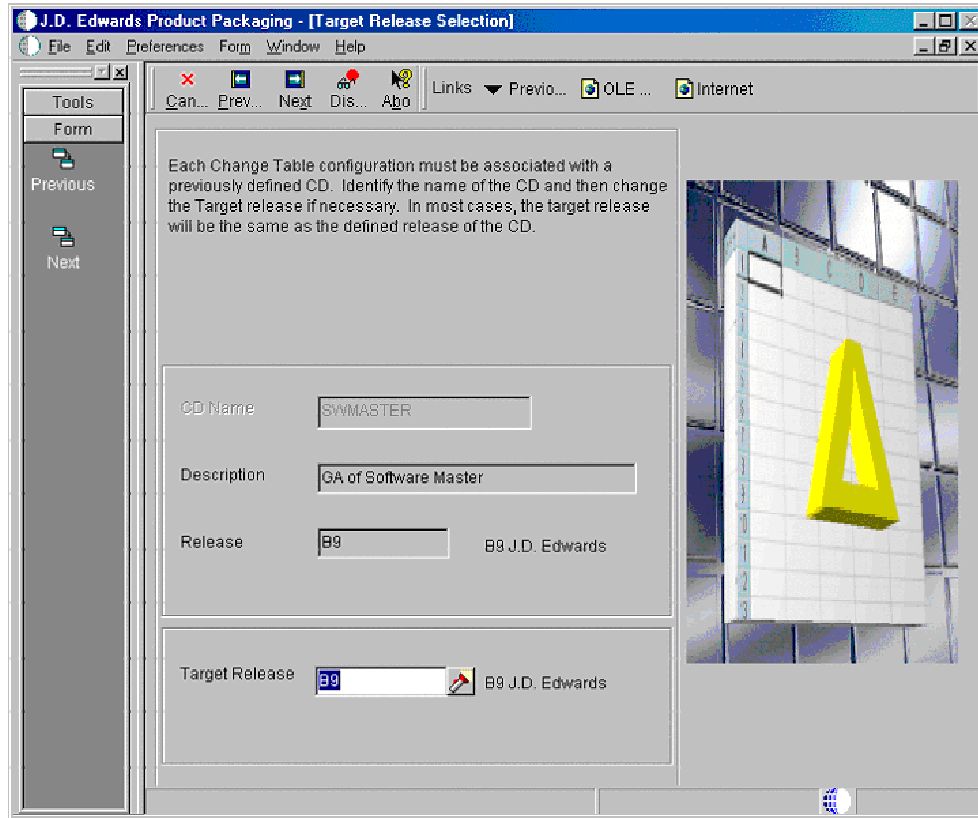
The following example illustrates why change table configurations are needed:

The home office in Denver, USA, makes software changes and wants to update an enterprise that is not networked to the Denver enterprise. The other enterprise, which has its own set of ERP 9.0 software and control tables, is in Paris, France. The Denver enterprise creates a software master that includes the package containing the ERP 9.0 software changes, as well as the change tables that contain data dictionary and user defined codes changes, which for this example are the only control table changes since the Paris enterprise was last updated. The Denver enterprise writes the software master to a CD and ships it to Paris. When the Paris enterprise installs the software master, the change tables will update the Paris control tables, which will make the tables concurrent with the Denver control tables.

### ► To configure change tables

*From the Change Table Director, which automatically appears during the mastering process if required by the template, click Next.*

*Alternatively, from Product Packaging (GH962), choose Change Table Configurations (P9642) and then click Add. On the Change Table Director, click Next.*



1. On the Target Release Selection form, complete the following field:

- Target Release

Change the target release to a custom UDC name that you are mastering. This name needs to be unique, such as B9TAX for the 1099 tax update. Choose the release name using the visual-assist button.

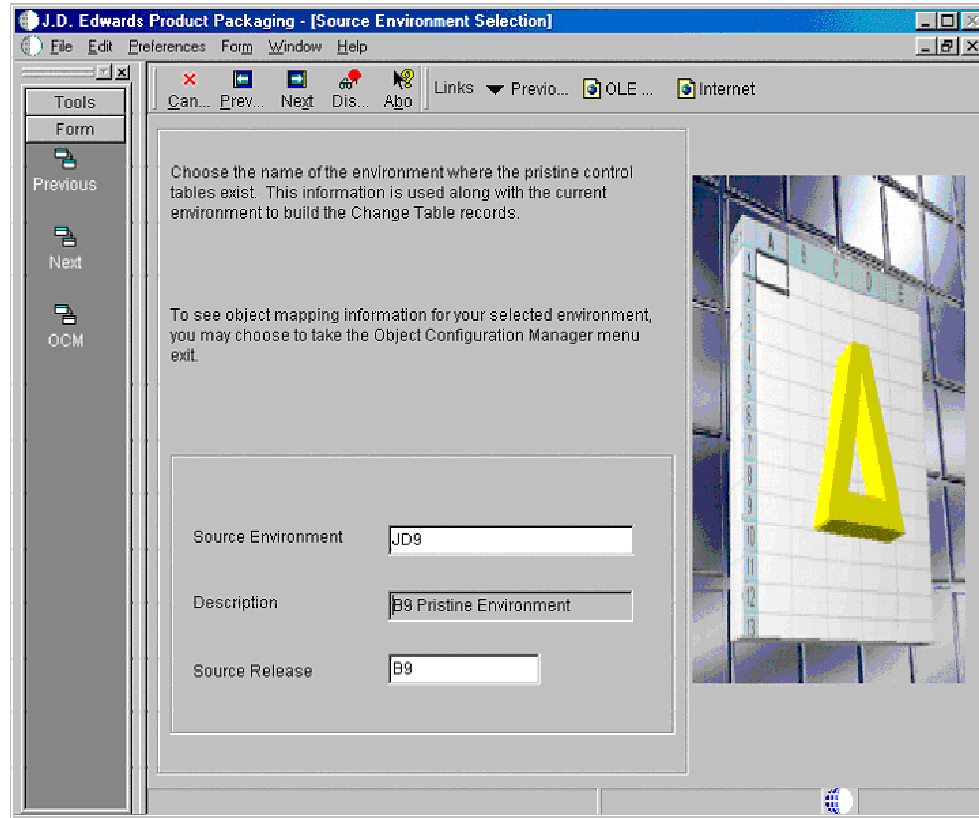
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**Note**

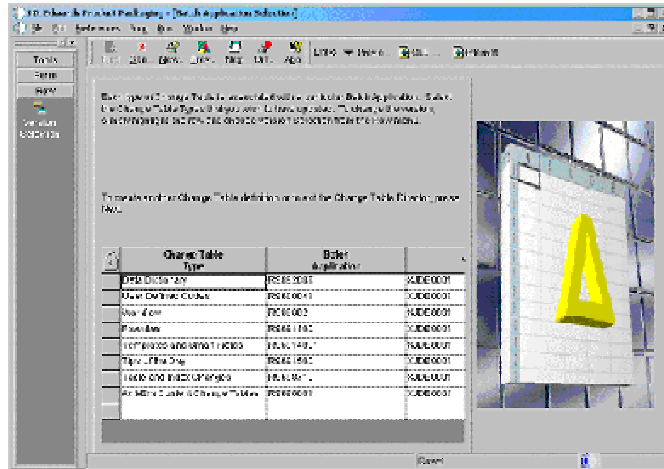
The software will not function correctly if these tables have the same value for the source and target release. To add the custom UDC, press the visual assist and then click Revisions. This action displays the Work with User Defined Codes form. On User Defined Codes, click Add. Scroll to the bottom of the grid and add the new value in the last line of the grid. Once you have created the UDC, choose the new UDC on the User Defined Code form, and click Select. This action will populate the Target Release field with the new value.

---

2. Click Next.



3. On Source Environment Selection, complete the following fields:
  - Source Environment  
Enter the name of the environment that includes the control tables used as the baseline for your changes. The source is typically the pristine environment (JD9). ERP 9.0 builds the change table records by comparing the target environment to this baseline.
  - Source Release  
Verify that the source release matches the release and the cumulative update level, such as B9, of the source environment that you want. ERP 9.0 automatically populates this field based upon the source environment.
4. Click Next.  
The Batch Application Selection form appears. This form lists the available change tables along with the batch application and version that will create the change table.



- To choose the default change tables that you want with your software master, double-click the gray button to the left of the change table row.

A check mark appears on the button.

Choose any or all of the following change tables where you made additions, deletions, or changes. The batch process compares the source and target tables in each selected category and creates a change table that contains all changes.

- Data Dictionary
- User Defined Codes
  - This batch application should always be chosen because these are always changes to the UDC defining the release.
- Workflow
- Favorites
- Templates and Smart Fields
- Tips of the Day
- Table and Index Changes
- Solution Explorer Change Tables

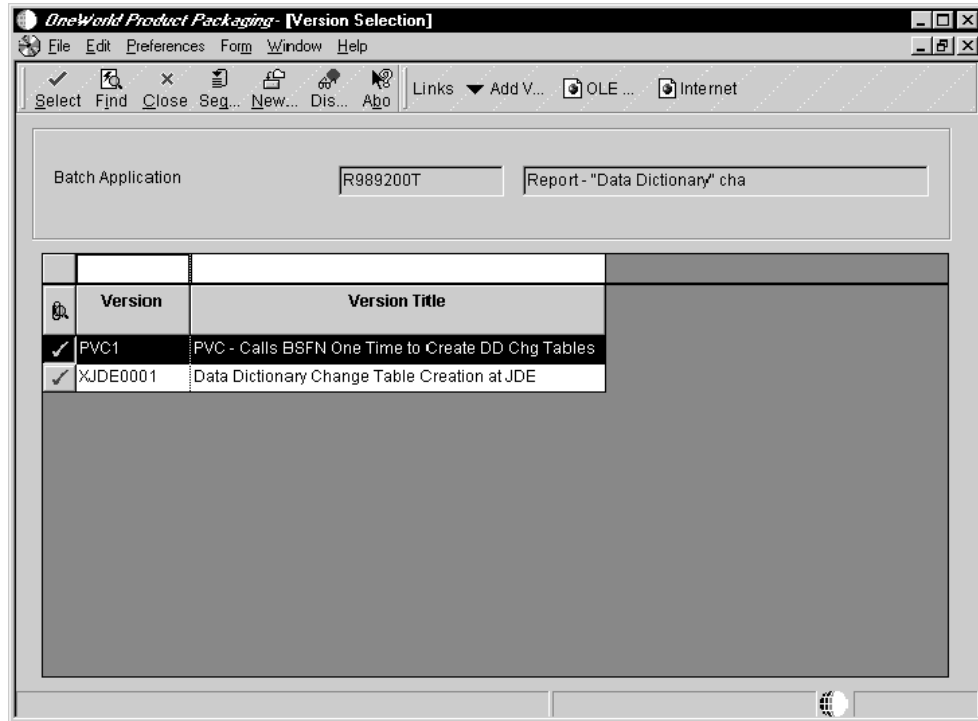
---

**Note**

You can double-click a check mark to remove it.

---

- To choose a different version or to choose multiple versions, choose a change table row and, from the Row menu, choose Version Selection.



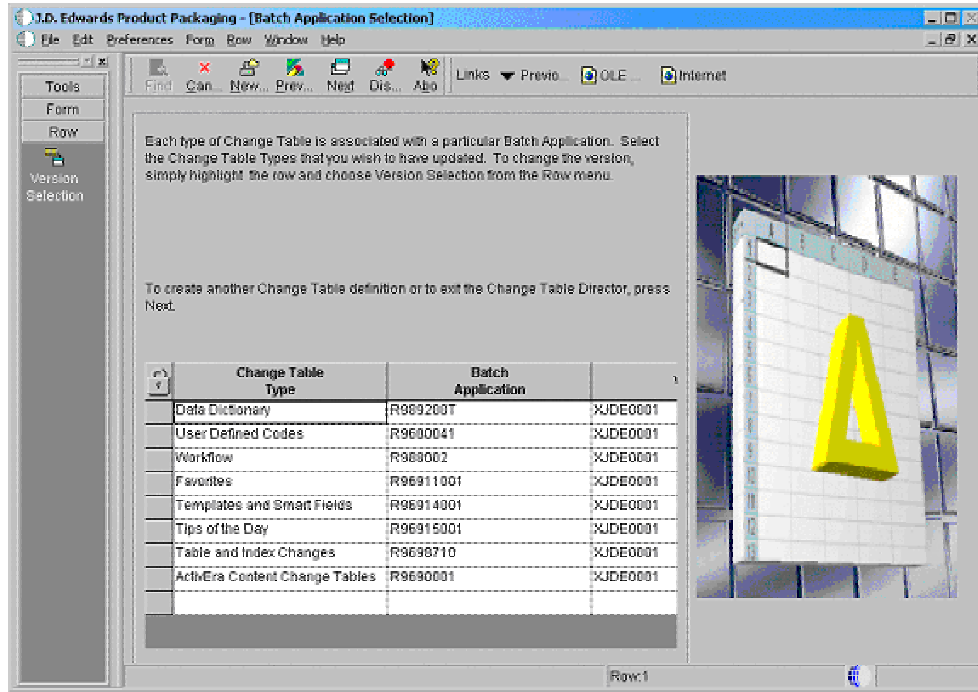
7. On Version Selection, choose one or more versions and click Select; or double-click the gray button to the left of a version.

A check mark appears to the left of the versions you chose.

8. After choosing the versions that you want, click Close.

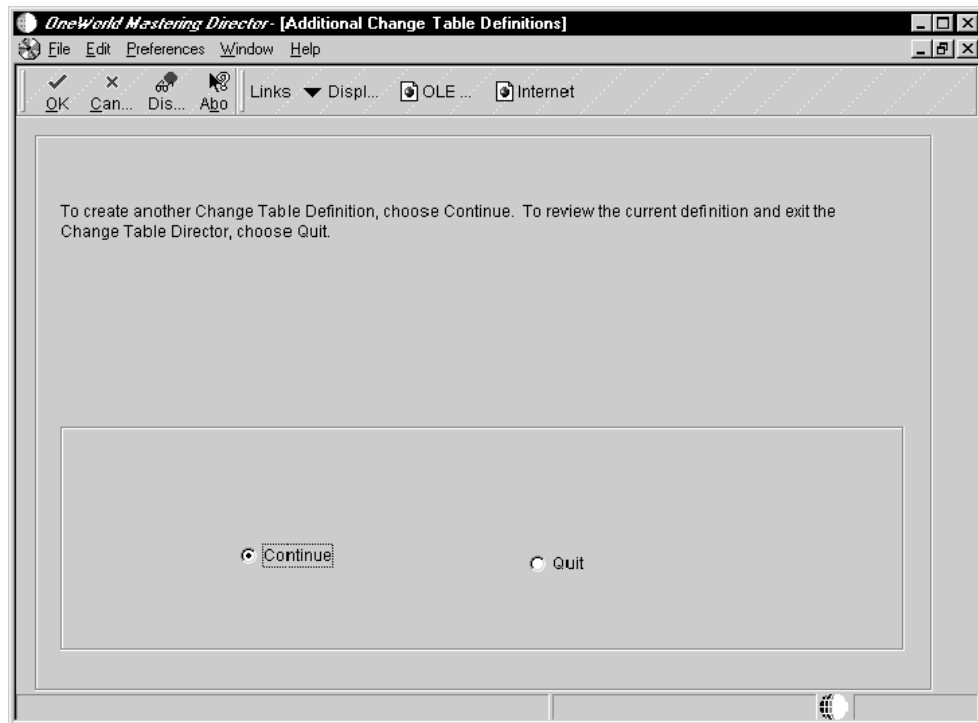
The Batch Application Selection form reappears.

A check mark appears to the left of the change table row you chose. The change tables that you want built for the software master must have check marks next to them or ERP 9.0 will ignore them. If you chose more than one version, the word <MULTIPLE> appears under the Version column for that change table.



9. Either choose another change table row and choose Version Selection from the Row menu, or click Next.

If you click Next, the Additional Change Table Definitions form appears.



10. On Additional Change Table Definitions, complete one of the following:
  - To define additional change table configurations for a new source and target release combination, choose Continue and click OK. The program displays the Target Release Selection form. Return to the beginning of this task and repeat the steps for a different source and target combination.
  - Choose Quit and click OK. This action stops the change table configuration director and displays the final revisions screen for mastering the defined CD.  
If you choose Quit, the CD Revisions form appears. Use this form to revise your software master definition.

---

**Note**

If you need to revise the change table configurations you just created, see *Revising a Software Master Definition* and *Revising or Submitting Change Tables* in the *Product Packaging Guide*.

---

11. On CD Revisions, click OK.  
Your software master definition is saved, and the CD Revisions form disappears.
12. Continue to the next task, which explains how to validate the definition you just created.

## Setting the Package Build Application to the Mastering Mode

To compress an update package, the package build application must be set in mastering mode.

► **To set the Package Build Application to the Mastering Mode**

---

*On the Deployment server, log on to ERP 9.0 in the DEP9 environment.*

*From the Package and Deployment Tools menu (GH9083), choose Package Build, and choose Prompt For Values.*

**Processing Options** [X]

**Processing**

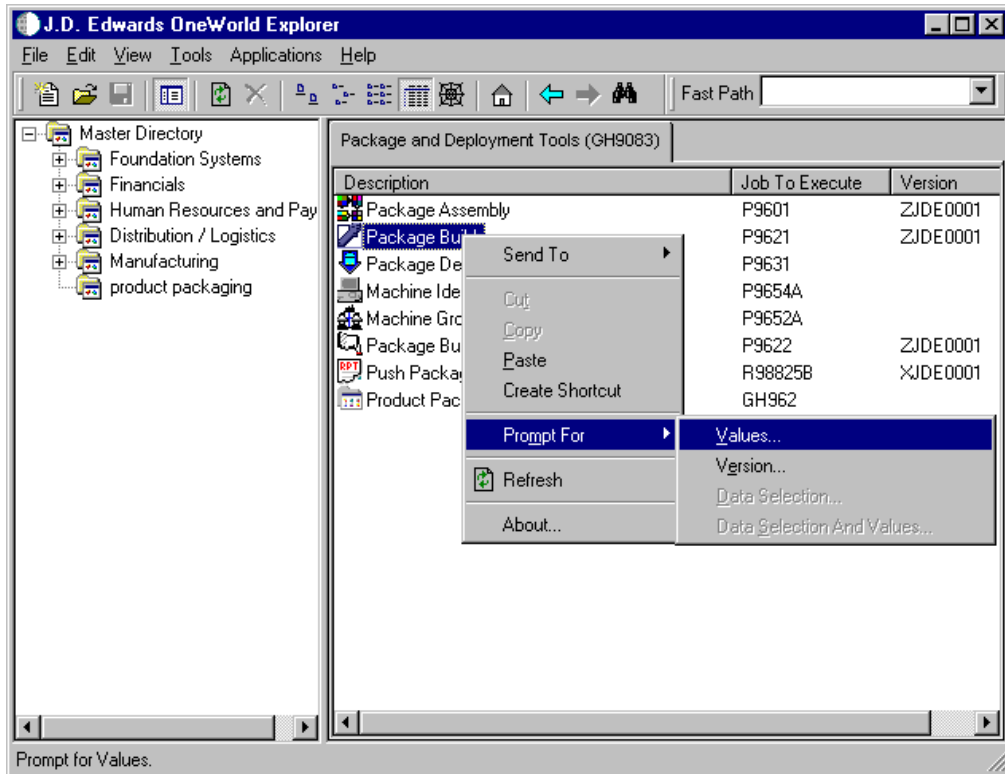
1. Enter a value to determine how changes will occur.

Blank = Changes will only be allowed at the package level and will apply to all servers selected.  
1 = Changes will be allowed to the build definitions by individual server.

2. Mark this processing option with a 1 if this process is for Mastering purposes. If the process is for all users, mark this processing option with a blank.

<Blank> = All Users  
1 = Mastering Only

3. Mark this processing option with a 1 if the Build Verification UBE is to be run prior to building all packages. If the build verification fails, the package build UBE will not be run.  
Blank - Do not run Build Verification  
1 - Run Build Verification



1. On Processing Options, type 1 in option 2 to set up the mastering mode.
2. Click OK.
3. Exit the package build application.

## Validating a Software Master Definition

This task explains how to run the Pre-Mastering CD Validation Report (R9640A) to validate the software master definition that you set up and what to look for in the report to help with your validation. The report runs in final mode. The report lists whether the build step is validated or not. The report will change the status of build steps that do *not* have errors.

### ► To validate a software master definition

*From Product Packaging (GH962), choose Product Packages/ J.D. Edwards Product Packaging (P9640).*

1. On Work With Software Mastering, click Find.  
The existing software master definitions appear.
2. Choose the master you want to validate, and then choose Validate from the Row menu.
3. On Report Output Destination, choose to view the report On Screen using Acrobat Reader, and click OK.

The report runs. All steps without errors whose status was In Definition (10) or Defined (20) are promoted to the status of Validated (30), and they will work properly during the software mastering process. Otherwise, the build step will have either a warning or an error message, as follows:

- Warning messages will not stop the creation of a software master. If a build step has a warning message, you should verify that the build step is as you want it before proceeding. Note that the report will always include a warning stating that the build step is different from the template. This warning is always true because the process uses a custom package build.
  - Error messages will stop the creation of a software master. You must fix any build steps that contain error messages. The message specifies the error.
4. Continue to the next task, which explains how to create the final software master.

## Creating a Final Software Master

This task explains how to create the final software master image from a definition that you previously created. You can master a single definition, or choose to master all definitions of a specific ERP 9.0 release.

The report that accomplishes this task is the Master CD (R9640B) report. This report controls the execution of all of the build steps and the UBEs associated with the build steps. This report also changes the status of each build step from 30 - Validated to a new status of 60 - Built or 50 - Failed.

### Build Time

With an average workstation, network, and ERP environment, the mastering process should take about an hour. However, ERP 9.0 includes many variables that can affect the time it takes to build a product package CD. These variables are as follows:

- Status and level of debugging
- Number of objects in the update package
- Size of the objects in the update package
- Overall size of the parent package
- Number of change tables to define
- Network speed
- Type of database
- Build machine speed
- Build machine memory
- Number of other processes running on the Enterprise Server, Deployment Server, and Build Machine

### Before You Begin

- Ensure that at least 1 GB of space is available for the TEMP directory of the workstation from which you use the Product Packaging Tools. This memory requirement is the most memory you might need for a software master. The actual size of the master depends upon the size of the package you create.

### ► To create a final software master

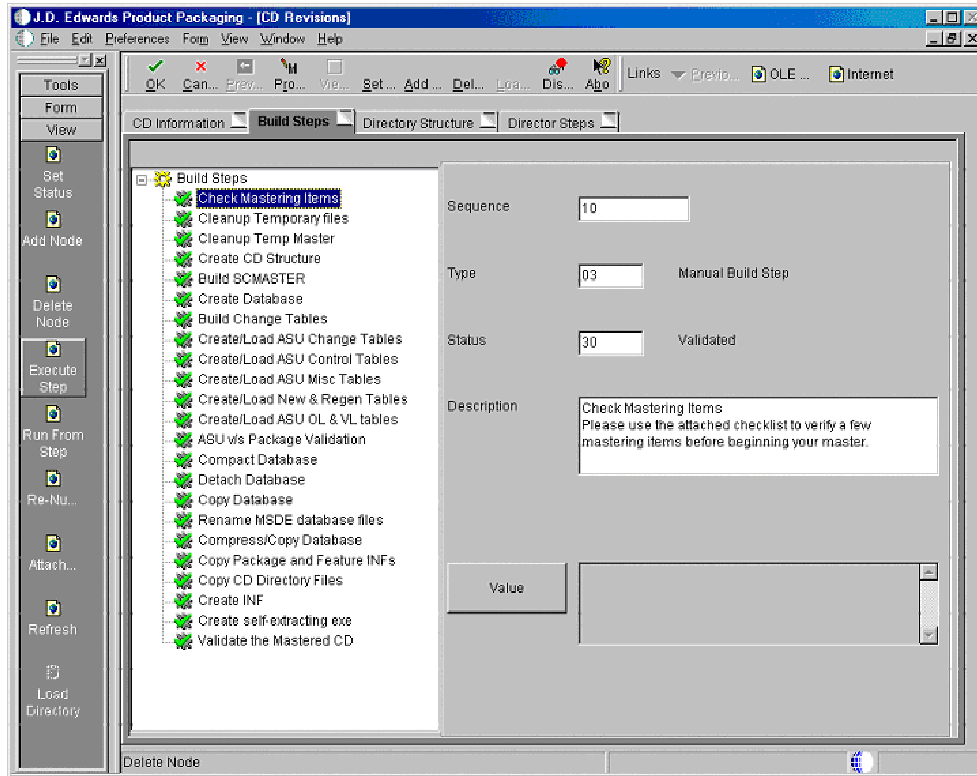
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*From Product Packaging (GH962), choose Product Packages/OneWorld Product Packaging (P9640).*

1. On Work With Software Mastering, complete one of the following:
  - To create a software master from one specific definition, click Find, choose the definition you want to create, and then click `Master CD` from the Row menu.
  - To create software masters for all definitions of a specific release, click `Master Release` from the Row menu. A form appears in which you enter the release number of the definitions you want to master.

Either choice runs a batch process (R9640B) that creates your software master based upon the definition you chose. Run the report locally and On Screen. Depending on the build steps to complete, the report launches several other reports, each corresponding to a particular build step.

2. The software mastering process will stop when it encounters a manual build step. To complete the manual build step, choose that build step, and click `Execute Step` from the View menu. The status of that step is advanced to 60 (Built). Click `Master CD` or `Master Release` to continue the software master process.

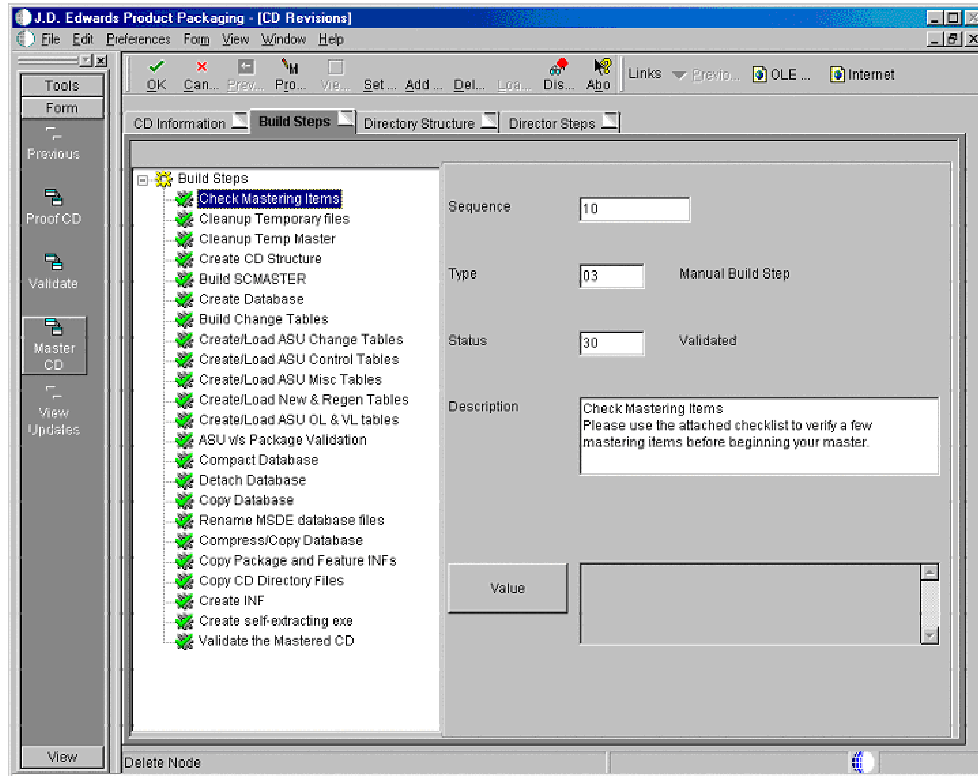



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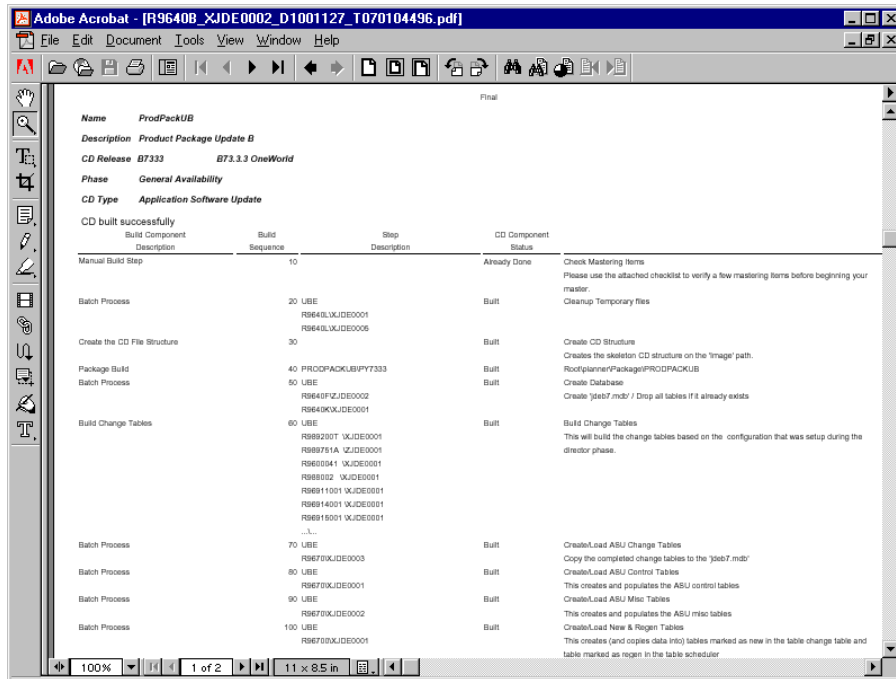
### Note

For more information about build steps, see *Revising a Software Master Definition* in the *Product Packaging Guide*.

---



3. The progress of the build can be monitored from the CD Revisions screen. From the View menu, choose Refresh.  
As each step is processed and completed, the icon cog will change color and style.
4. The last build step automatically validates your software master and generates a final report (R9840B) This report includes a comprehensive status of the product package build. Review this report for errors.



If the validation report does not show any errors, you have successfully created a software master. This report validates that the number of directories match between the software master definition and the final software master. It also provides details about the file counts and the total size of the master in megabytes.

This process automatically creates a self-extracting executable file and a CAB file and places them in the \$TEMP/final directory using the name of the software master followed with the .exe and .cab extensions. Use the executable (.exe) file to update ERP 9.0. Both files include the full software master with all of its directories. If you have a size restriction, such as when downloading from the Internet, you can use the CAB file (which is always smaller than the executable file), but you will need to use a third-party application to uncompress the CAB file.

## Confirming the Software Master

After you create the software master image, you should visually check the directory structure and JDEmasters database to verify that the image is complete.

### ► To confirm the software master

*In Windows Explorer, open the image path directory.*

- Check that the package directory includes the following files:
  - install manager files
  - planner directory
  - a data cab in the planner directory
  - a directory named the same as your package
  - cab files in your package directory.
- Verify that the \$TEMP\final directory includes the following two files:

*packagename.cab*

*packagename.exe*

3. Open the JDE Masters database in the \$TEMP\master directory, and verify that this database is populated with tables.

---

**Note**

If your package includes new custom tables, verify that they are in the JDE Masters database and that they and their associated index change tables have records.

---

## Moving the Software Master to a CD ROM

Once the software master process has been completed and confirmed, the image can be burned onto a CD.

► **To move the software master to a CD ROM**

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Using a CD burner and CD burner software, copy the *packagename.cab* or *packagename.exe* file from the \$TEMP/final directory onto the CD ROM.

## Updating ERP 9.0 with the Software Master

This task explains how to update ERP 9.0 using the software master you created. To perform this ERP 9.0 update, access the Work with Updates (P96470) application from the System Installation Tools (GH961) menu. This process includes setting merge flags, running the self-extracting executable (*packagename.exe*), running software updates, and executing installation workbench.

► **To update ERP 9.0 using a software master**

---

**Note**

On the deployment server, complete the Customer Preparation tasks described in the *ERP 9.0 Software Update Guide*.

---

1. Run the *Product\_Package.exe* executable file from the CD.

This process installs the package into the Planner\Package directory on the deployment server, and extracts the *Product\_Package\_Name.mdf* and *Product\_Package\_Name.ldf* files into the Planner\Data directory. The process also creates the software master image in the PLANNER directory.

---

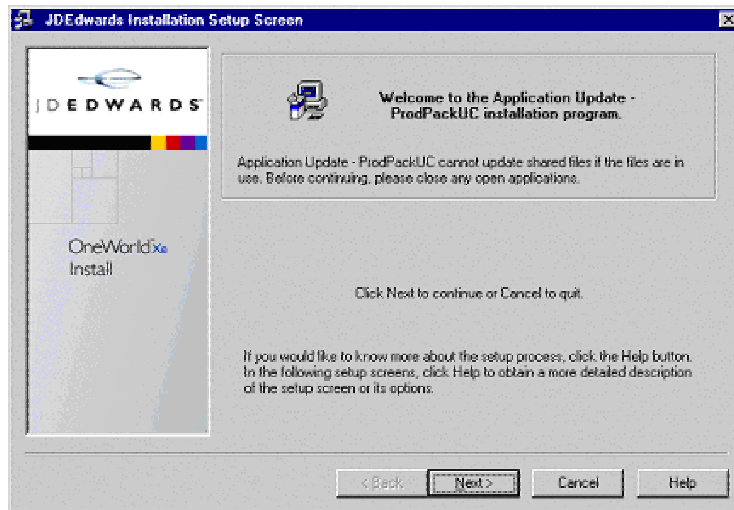
**Note**

You can also use the CAB file to create the software master image on your deployment server, but you need to use a third-party application to uncompress the file.

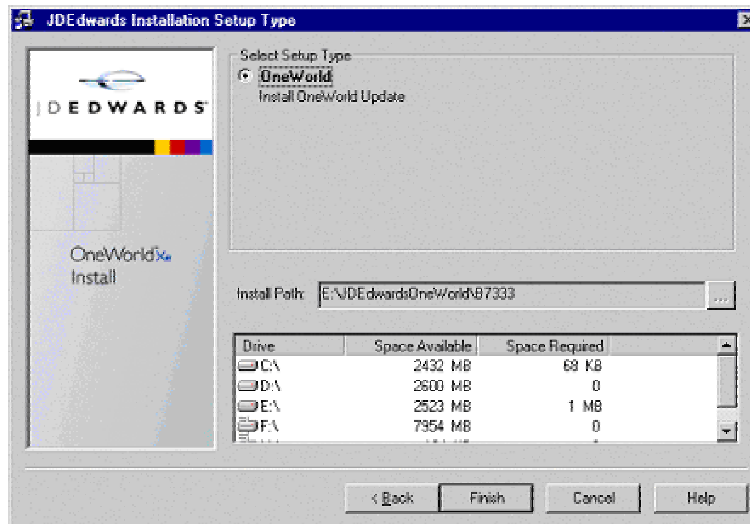
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2. If InstallManager.exe exists on the CD, start the installation by double-clicking it.

If this file is not on the CD, double-click the PACKAGE\_NAME.exe file to self-extract and uncompress the CAB file. Once uncompressed, Install Manager will automatically launch.

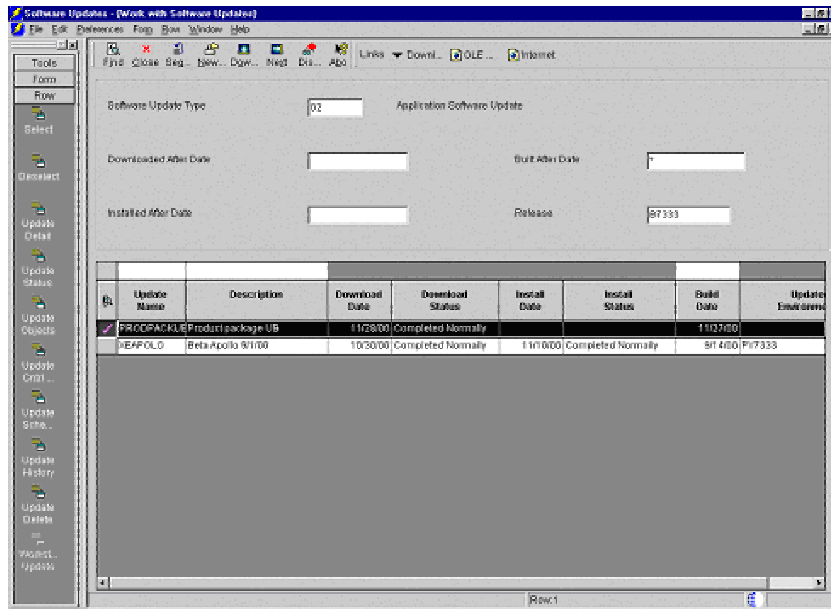


3. On JDEdwards Installation Setup Screen, click Next.

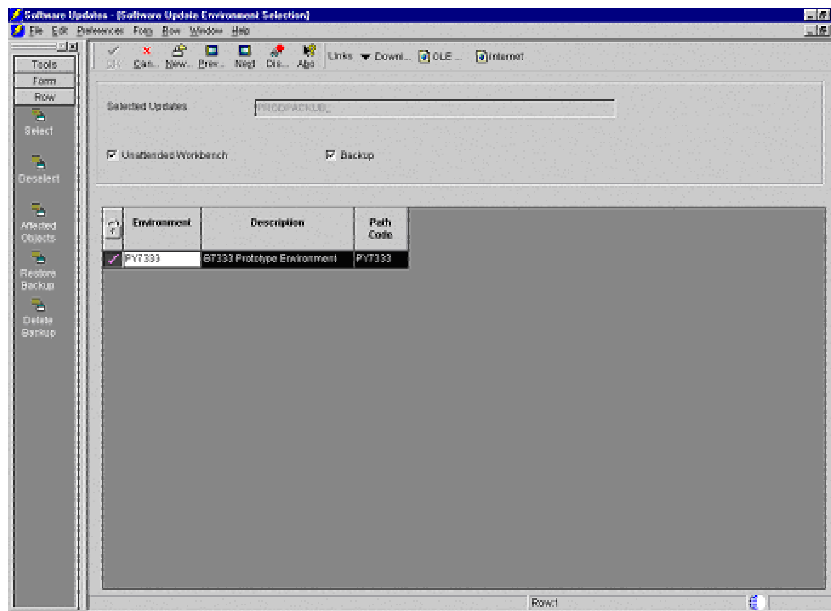


4. On JDEdwards Installation Setup Type, verify that the machine has the necessary disk space and that the Install Path is correct, and then click Finish.
5. When the installation is complete, the Install Manager displays the "Installation Complete" window.
6. Click OK.
7. Log on to ERP 9.0 on the Deployment Server in the Planner environment (JDEPLAN).
8. Type GH9612 in the Fast Path.

9. Choose Application Software Updates (P96470).
10. On Work with Software Updates, click Find.



11. Choose the product package to install, and click Next.



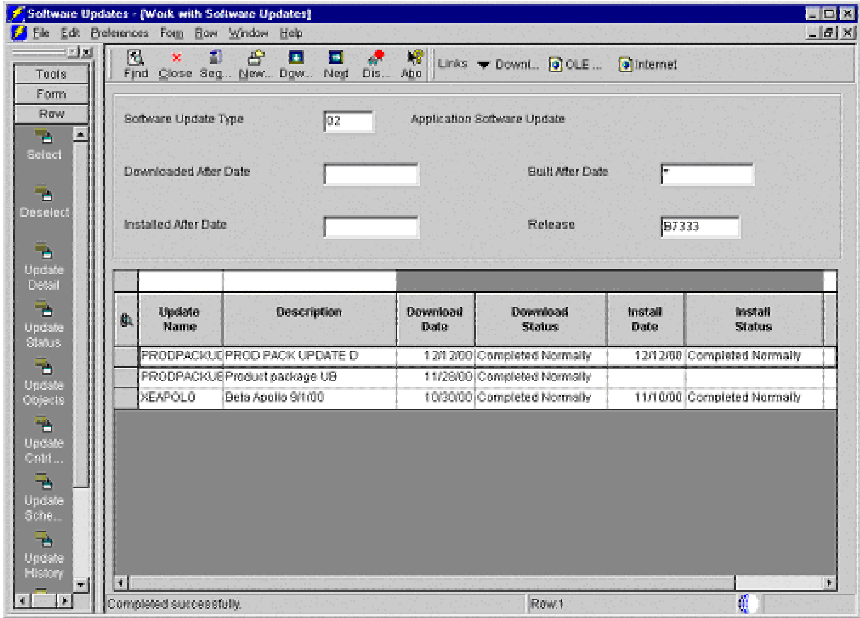
12. On Software Update Environment Selection, choose the pathcode to install the package on to, and click Next.

If unattended mode is chosen, the Installation Workbench will automatically perform all the workbench tasks to complete the installation. If unattended mode is not chosen, the Installation Workbench tasks must be done manually. If backup is

chosen, the process will create an MSDE database (OWBAK\_packagename\_pathcode) and its corresponding files called OWBAK\_packagename\_pathcode.mdf and OWBAK\_packagename\_pathcode.ldf in the Planner\Package\Package\_Name\PathCode.bak\data directory. Only the tables and objects affected by the update will be backed up in the database.

The Installation Workbench should stop after the Table Conversion workbench is complete.

13. Review the PDFs and the log files created by the table conversions, and then continue with Installation Workbench.
14. When Installation Workbench is complete, Software Updates returns to the Work with Software Updates screen, and the selected software update should have the Completed Normally install status.



15. Click Close to exit Work with Software Updates.
16. Review all PDFs generated on the deployment server by the software update process, and verify that each of report is free of errors.

If a report has errors or does not appear to have run, review the jde.log file to determine the source of the problem. The table below includes descriptions of the Software Update reports.

Report	Version	Description
R98405 – Application	XJDE0001	Table Conversion/Merge Driver for Application Tables: Master UBE for creating and regenerating application tables. This report should have only one record: Table and Index Creation (F984072). The status of the record should be: Completed Normally.
R98407	XJDE0001	Table and Index Creation: Launched by R98405 UBE, which creates or regenerates all tables

specified in the table change table. Page one of the report includes source, target, and environment information. Page two includes the overall status of the table creation in green or red text. Subsequent pages list the status of each table and index to be created or regenerated.

R98405 – Control	XJDE0001	Table Conversion/Merge Driver for Control Tables: The master UBE that specifies the control table merge UBEs to launch. It should list the following UBEs: Data Dictionary (R989200P), and User Defined Codes (R9600042). The status on all should be: Completed Normally.
R989200P	XJDE0001	Data Dictionary Merge: Launched by R98405. This UBE merges all data dictionary changes specified in the data dictionary change tables into the existing data dictionary. Page one of the report has source, target, and environment information. Subsequent pages list the status of each data dictionary addition or change. At the end of the individual listings, the overall status of the data dictionary merge is listed in green or red text. The final page has detailed summary information.
R9600042	XJDE0001	User Defined Code Merge: Launched by R98405. This UBE merges all user defined code changes specified in the UDC change tables into the existing UDC tables. Page one of the report lists source, target, and environment information. Subsequent pages list the status of each UDC addition or change. The final page has detailed summary information.
R9690002	XJDE0001	Solution Explorer Merge: Launched by R98405. This UBE merges all Solution Explorer changes specified in the SE change tables into the existing SE tables. Page one of the report lists source, target, and environment information. Subsequent pages list each addition, change, or deletion in the change tables. The final page has detailed summary information.
R96911002	XJDE0001	Favorites Merge: Launched by R98405. This UBE merges all Favorites changes specified in the Favorites change tables into the existing Favorites tables. Page one of the report lists the source, target, and environment information. Subsequent pages list the status of each Favorites addition or change. The final page has detailed summary information.
R96914002	XJDE0001	Report Director Templates Merge: Launched by R98405. This UBE merges all Favorites changes specified in the Report Director Templates change tables into the existing Report Director Templates

tables. Page one of the report lists the source, target, and environment information. Subsequent pages list the status of each addition or change. The final page has detailed summary information.

R96915002	XJDE0001	Tips Merge: Launched by R98405. This UBE merges all Tips changes specified in the Tips change tables into the existing Tips tables. Page one of the report lists the source, target, and environment information. Subsequent pages list the status of each addition or change. The final page has detailed summary information.
R98405 – Spec	XJDE0001	Table Conversion/Merge Driver for specification tables: Master UBE for specification table merge. This report should have only one record: Specification Merge (F98710). The status of this record should be: Completed Normally.
R98700	ZJDE0002	Specification Merge: Launched by R98405. This UBE adds, replaces, and merges all specified object specifications into the selected Central Objects path code. This report is the standard specification merge report. Page one of the report lists the source, target, and environment information. Page two summarizes information about the merge status. The remaining pages include the individual object action and status.

17. On the Deployment Server, log on to ERP 9.0 in the DEP9 environment.
18. Find the package in the Package Assembly (P9601), and build and deploy the update package to a client workstation.
19. Open Object Management Workbench (OMW) and view the new project with all the updated objects that were included in the Product Package.

---

## Software Master

This section explains how to delete a software master after you have created it. This section also explains how to revise, copy, proof, validate, and delete a software master definition after you have created it.

### See Also

- ❑ *Creating a Final Software Master* in the *Product Packaging Guide* for information on how to convert your software master definition into the final software master that you can deploy to your enterprise
- ❑ *Defining a Software Master* in the *Product Packaging Guide* for information on how to create a software master definition

---

## Working with a Software Master

This chapter explains how to delete a software master. Objects in the software master refer to the following:

- ERP 9.0 objects, such as applications and business functions
- Control and change tables, such as data dictionary items or user defined codes
- Application data, such as the Address Book table

## Deleting a Software Master

To delete a software master, perform the following task.

---

### Important

All records associated with the definition, such as the change table configurations and repair director records, will be deleted when you delete the software master.

---

---

### ► To delete a software master definition

---

*From Product Packaging (GH962), choose Product Packages (P9640).*

1. On Work With Software Mastering, click Find.  
Existing software masters appear.
2. Choose the master you want to delete, and then click Delete.  
A message box appears asking if you are sure you want to delete the software master definition.
3. Click OK.

## Working with a Software Master Definition

---

This chapter explains how to work with a software master definition after you have created one. Once you have completed the definition of a software master, you can revise any of the information, including the build steps and directory structure. You also can copy the definition information to a new software master definition, delete the definition, and proof and validate it.

### Revising a Software Master Definition

You can revise a software master definition that you already created. This revision allows you to modify the information you entered into the CD Configuration Director, as well as the build steps and directory structure included with the template that you chose.

---

#### Note

If you need to add a new software master definition, see *Defining a Software Master* in the *Product Packaging Guide*.

---

---

#### ► To revise a software master definition

---

*From Product Packaging (GH962), choose Product Packages/J.D. Edwards Product Packaging (P9640).*

1. On Work With Software Mastering, click Find.  
Existing software master definitions appear.

OneWorld Product Packaging - [Work With Software Mastering]

File Edit Preferences Row View Window Help

Select Find Add Copy Del... Close Seg... New... Vali... Mas... Rep... Mas...

Release	Build Phase	Build Phase Description	CD Type	Type Description	CD Name	
B7333	03	General Availability	01	Setup CD	B7333 Change Tables	Pre-alpha
B7333	03	General Availability	09	Application Software U	QINGASU	Qing ASU
B7333	03	General Availability	09	Application Software U	Software Master	GA of a So
B7333	03	General Availability	09	Application Software U	TSTASUCD	Test ASU
B7333	03	General Availability	09	Application Software U	TSTASUCD1	T
B7333	03	General Availability	11	Custom CD	Change Table	
B7333	03	General Availability	11	Custom CD	Qing Test	Change T:
B7333	01	Alpha	01	Setup CD	B7333 Alpha Masters	B7333 Alp
B7333	01	Alpha	01	Setup CD	B7333 JanAlpha Masters	Mastering
B7333	01	Alpha	01	Setup CD	B7333 Pre-Alpha Testing	Pre-Alpha
D7333	01	Alpha	01	Setup CD	testing versions	
B7332	03	General Availability	01	Setup CD	B7332 GA Masters-SetupCD	GA- B733.
B7332	03	General Availability	09	Application Software U	10	Tools SP f
B7332	03	General Availability	09	Application Software U	3298324	Freegoods
B7332	03	General Availability	09	Application Software U	4	Model
B7332	03	General Availability	09	Application Software U	7	Tools Mod
B7332	03	General Availability	09	Application Software U	ASU Creation	Applicator

Find records Row:1

- Choose the master you want to revise, then click Select. The CD Revisions form appears.

OneWorld Product Packaging - [CD Revisions]

File Edit Preferences Form View Window Help

OK Can... Prev... Pto... Add... Del... Loa... Dis... Abo

Links Proc... OLE ... Internet

CD Information Build Steps Directory Structure Director Steps

Name: Software Master

Type: 09 Application Software Update

Release: B7333 B73.3.3 OneWorld

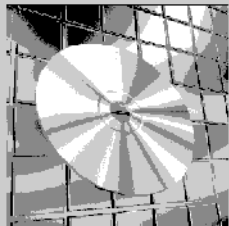
Build Phase: 03 General Availability

Status: 20 Defined

Description: GA of a Software Master

Comment:

Image Path... C:\B7



3. To refresh the information shown on any tabs on the CD Revisions form from the View menu, choose Refresh.
4. To validate the information shown on any tabs, click Validate. A report runs in proof mode to validate the definition.

---

**Note**

To run this report in final mode, see *Validating a Software Master Definition* in the *Product Packaging Guide*.

---

5. Click the CD Information tab and revise the following fields:
  - Status  
Verify the status of the software master definition.
  - Description  
Optional. Enter a description of the software master definition.
  - Comment  
Optional. The mastering process populates this field with status information about the process. You can also enter any additional information about the software master definition, but ERP 9.0 will overwrite that information when a subsequent process completes.
  - Image Path  
Verify the directory path where you want your software master to reside on your enterprise. If the directory does not exist, ERP 9.0 will create it for you when you run the software mastering process. The directory you indicate will be the root directory for when you create your final software master.

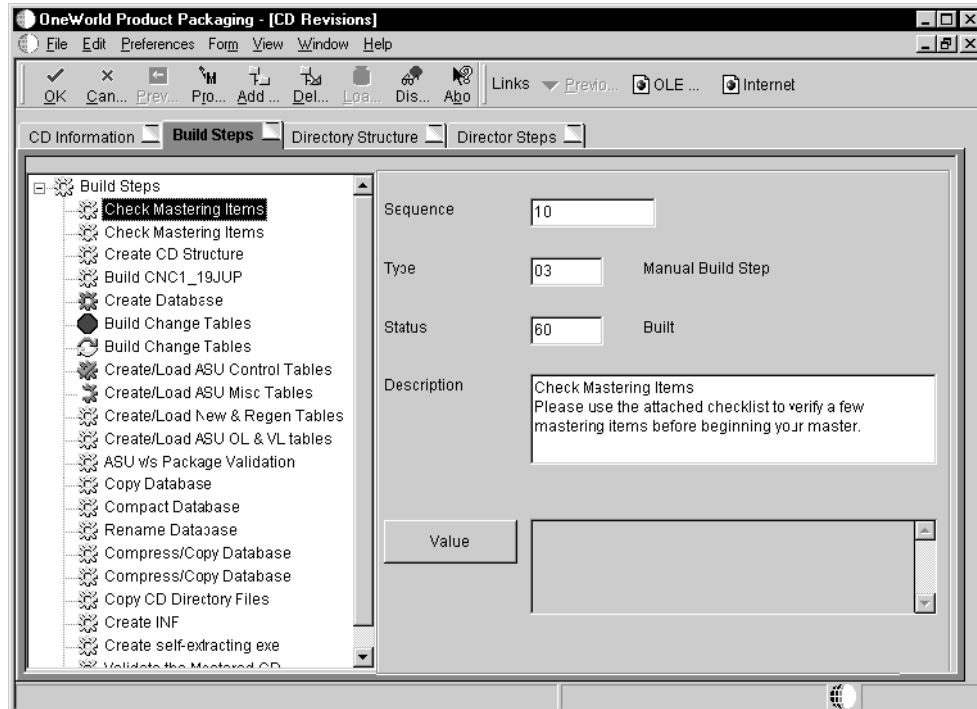
---

**Note**

See the "Software Master Creation" section in this guide for information about running the software master process.

---

6. Click the Build Steps tab.



7. To revise a build step, choose the step and complete the following fields:

- **Sequence**  
Verify the order in which you want the step performed during the creation of the software master definition. You can use the same sequence number for multiple build steps.
- **Type**  
Verify which component type you want the build step to perform. For example, you can define steps to create file structures, build a package, or create INF files.
- **Status**  
Verify the current status of the build step, which can indicate whether or not to run the particular step during the mastering process. For example, if there are manual steps that you need to perform during the mastering process, you can manually complete the step, change the step's status to 60 (Built) by choosing the step, and then, from the View menu, choose Execute Step.

The icons to the left of each build step illustrate the status of that step:



The status code is 10, In Definition



Gray Cog. The status code is 20, Defined.



The status code is 30, Validated.



The status code is 40, Processing.



The status code is 50, Failed.



Gold Cog. The status code is 60, Built.

The following fields are dynamic and appear depending upon the build step you chose:

- **Description**  
Enter a description about the build step. The first line of the description appears as the text for the build step. This line of text appears in the tree view on the left side of the form. You may want to enter a short descriptive name in the first line of the Description field, such as Check Mastering Items, then press the Enter key before typing in a more robust description for the step.
- **Target Folder**  
ERP 9.0 may populate this field based upon the build step's definition in the software master template. To change this field, click the Target Folder button and use the Select CD Directory form to choose the target folder for this build step.
- **Executable**  
ERP 9.0 may populate this field based upon the build step's definition in the software master template. To change this field, click the Executable button and use the Select a Windows Executable form to choose an executable for this build step.
- **Value/Parameter**  
Verify the value or parameter. To change this information, click the Value/Parameter button, then enter a value or parameter appropriate to the step you chose. This field is dynamic. The button name is either Value or Parameter, based upon the step that you chose. The form that appears when you click the button also depends upon which step you chose. For example, the Package Build step calls the Select Package Build form, from which you can choose a package; and the Build Change Tables step calls the Work With Change Table Definitions form, from which you can modify the change table configuration.

8. To add a step, click Add.

ERP 9.0 creates a new step labelled Undefined and places it at the end of the steps.

9. Choose the Undefined step and complete the following fields:

- Sequence
- Type
- Status
- Description
- Value

10. To run one or more steps, choose the build step you want to run, and from the View menu either choose Execute Step to run just that step or choose Run From Step to run that step plus any steps that follow it.

This option runs the step and updates its status to 60 (Built). You might use this option for manual build steps. Manual steps are those that you need to perform yourself, such as an additional mastering step that is not part of the Product Packaging Tools. After you complete the manual step, use the Execute Step option to update the step to a status of 60 so that you can proceed to the next step in the process.

11. To add an attachment to a build step, choose the step and from the View menu, click Attachments.

The Media Objects form appears.

---

**Note**

See *Media Objects and Imaging* in the *System Administration Guide* for information about attaching media objects.

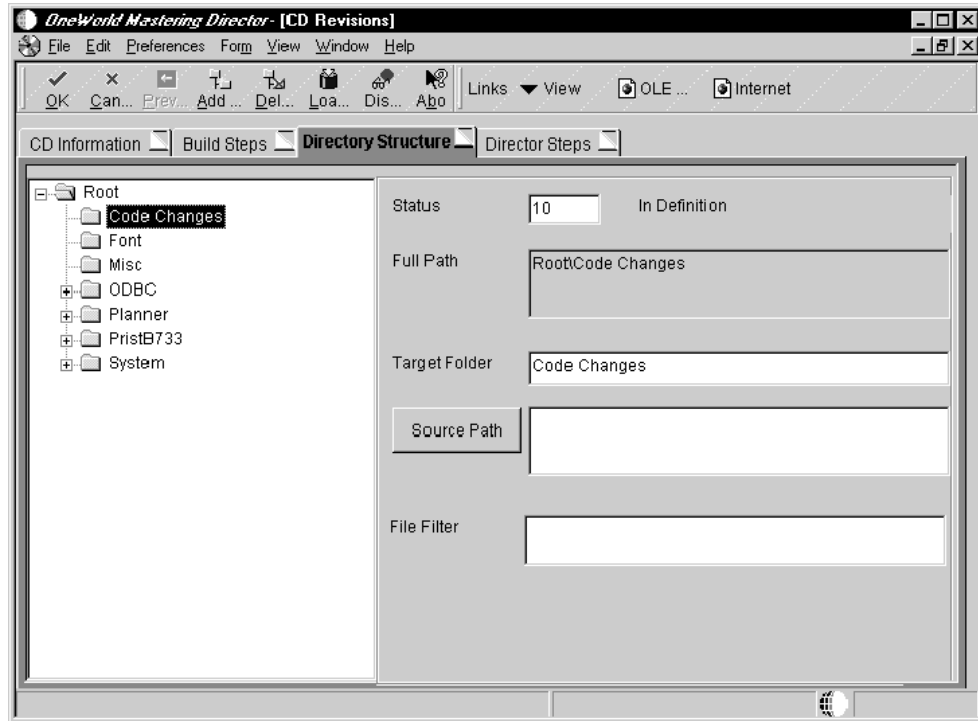
---

After attaching a media object, a paper clip appears in the upper-right corner of the Build Step tab for that build step.

12. To renumber your build steps, from the Form menu, click Renumber.

ERP 9.0 renumbers your build steps, updating the Sequence field. The renumbering begins with 10 and increments each step by 10 (10, 20, 30, and so on). ERP 9.0 keeps the build steps in the same sequence that you or the software master template established.

13. To delete a step, choose the step, and click Delete.
14. Click the Directory Structure tab.



15. To revise a directory, choose the directory and complete the following fields:

- **Status**  
Verify the status of the directory.
- **Target Folder**  
ERP 9.0 populates this field based upon the directory's definition in the software master template. Do not change the directory name that was defined in the template.
- **Source Path**  
Verify the directory path of the source that will populate the component. This is the source path name of the data that you want to retrieve for the master and that you placed into the target folder. You can specify this path using either a relative or absolute path. See "Appendix A" for information about relative and absolute paths.
- **File Filter**  
Verify the file filter (\*. \* is the default). The file filter allows you to filter any data files you retrieve from the source directory. For example, you can use \*. \* to retrieve all files in the source directory.

16. To add a subdirectory, click a directory for which you want to add a subdirectory and click Add. You can choose any directory, including Root.

ERP 9.0 creates a new directory labeled Undefined and places it at the bottom of the structure.

17. Choose the Undefined directory and complete the following fields:

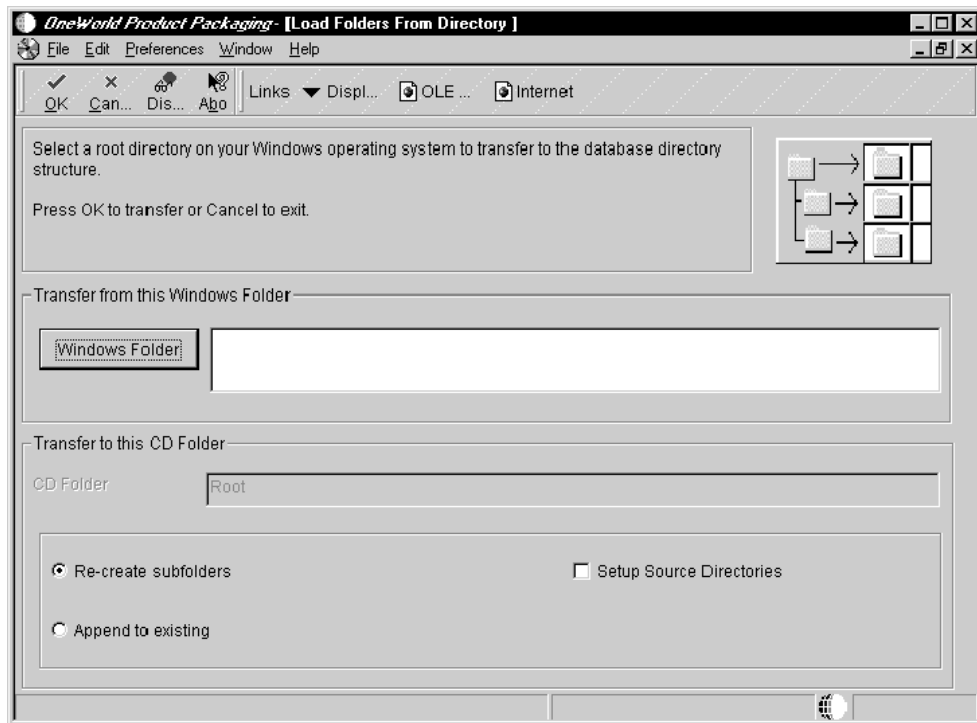
- Status
- Target Folder  
ERP 9.0 populates this field for new directories with Undefined. Change this field to represent the new directory's name.
- Source Path
- File Filter

18. To load a subdirectory from an enterprise network directory, click on the directory that will be the root of the subdirectory that you want to load, which must already exist on your enterprise.

This feature copies any enterprise directory structure into the software master definition. Complete the following:

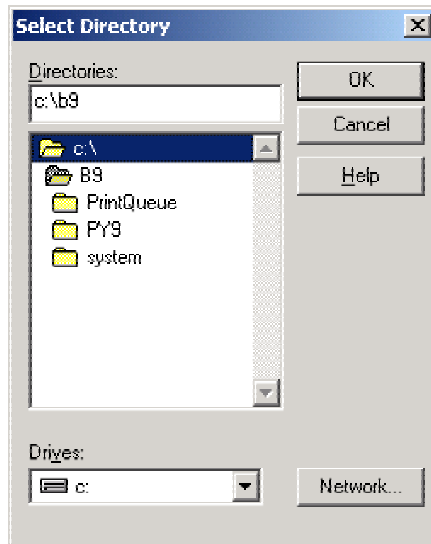
19. Click Load.

The Load Folders From Directory form appears.



20. Click Windows Folder.

The Select Directory form appears.



21. Find and choose a directory you want to load into your software master, then click OK.
22. On the Load Folders From Directory form, choose one of the following:
  - Re-create subfolders  
This option replaces (deletes) the existing subdirectories and replaces them with the subdirectories you want to load into the software master.
  - Append to existing  
This option appends to the existing subdirectories the subdirectories you want to load into the software master.
23. If needed, click the Setup Source Directories checkbox. When creating the software master, having this checked will automatically create the structure of the source directories and it will also copy all files within the source directories to the software master.  
  
If you do not check Setup Source Directories, ERP 9.0 will create the source directory structure within the software master and the directories will be empty.
24. Click OK.
25. To delete a directory and all its subdirectories, choose the directory, then click Delete.
26. When finished revising the software master definition, click OK.

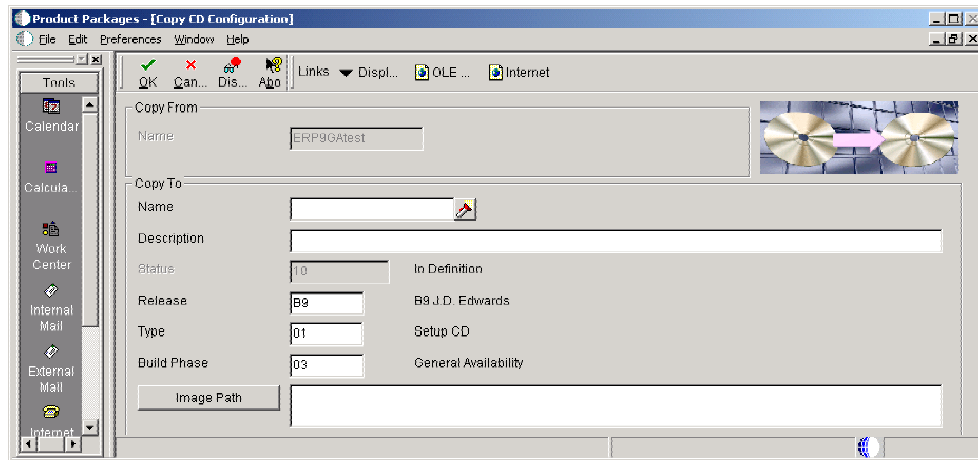
## Copying a Software Master Definition

You can copy a software master definition that you already created, which allows you to copy the information that you entered into the CD Configuration Director, the build steps, and the directory structure.

► **To copy a software master definition**

From *Product Packaging (GH962)*, choose *Product Packages (P9640)*.

1. On *Work With Software Mastering*, click *Find*.  
Existing software master definitions appear.
2. Choose the master you want to copy, and then click *Copy*.



3. On *Copy CD Configuration*, complete the following fields and click *OK*:
  - **Name**  
Enter a unique name for the software master definition you are copying, such as *B9 Update*.
  - **Description**  
Optional. Enter a description of the software master definition.
  - **Release**  
Enter the ERP 9.0 release for the copy of the software master definition, such as *B9*.
  - **Type**  
In most cases you will not need to change the default value. If you need to, however, you can change the type of your software master when making a copy. For example, you can change the type from a *Setup CD* to an *ASU CD*. This change does not change build steps or the directory structure. When you validate your software master, you will receive warning messages that your master does not match the default settings of the *ASU CD* template; this is because your master is actually based on the *Setup CD* template. You will not be prevented from creating your software master.
  - **Build Phase**  
Enter which phase of development your software master definition represents, such as *alpha*, *beta*, or *general availability*.

- Image Path

Enter the directory path where you want your software master to reside on your enterprise. If the directory does not exist, ERP 9.0 will create it for you when you run the software mastering process. The directory you indicate will be the root directory for the software master that you create.

---

**Note**

See *Software Master Creation* in the *Product Packaging Guide* for information about running the software master process.

---

## Proofing a Software Master Definition

You are able to proof software master definitions. To do so, you create a report, which details each build step in the definition and shows the sequence of steps and which processes, if any, each step will run when creating the actual master.

Proofing a software master definition does not change any part of the status of a software master.

### ► To proof a software master definition

---

*From Product Packaging (GH962), choose Product Packages/J.D. Edwards Product Packaging (P9640).*

1. On Work With Software Mastering, click Find.  
Existing software master definitions appear.
2. Complete one of the following:
  - To proof one software master definition, choose the definition you want to create, and then choose Proof CD from the View menu.
  - To proof all software master definitions for a specific release, choose Proof Release from the View menu. A form appears in which you enter the release number of the definitions you want to proof.

For whichever proof method you chose, the Report Output Destination form appears.

3. Specify whether to send the report to a printer or to view an online version of the report using Acrobat Reader, and click OK.

A batch process runs a report that shows each build step in sequence and what processes, if any, each step runs when creating the actual master.

## Validating a Software Master Definition

You run a report to validate the software master definition that you created. The report runs in final mode, and it changes the status of the build steps that do not have errors.

### ► To validate a software master definition

---

*From Product Packaging (GH962), choose Product Packages (P9640).*

1. On Work With Software Mastering, click Find.  
Existing software master definitions appear.
2. Choose the master you want to validate, and then click Validate.  
The Report Output Destination form appears.
3. On Report Output Destination, specify whether to send the report to a printer or to view an online version of the report using Acrobat Reader, and then click OK.

The report runs. All steps without errors whose status was In Definition or Defined are promoted to the status of Validated. The report lists each build step that will run when you create your master. The report lists whether the build step is validated or not. If it is validated, the build step will work properly when creating the software master. Otherwise, the build step will have either a warning or error message, as follows:

- Warning messages will not stop the creation of a software master. The message specifies what the warning is. If a build step has a warning message, you should verify that the build step is as you want it to be before proceeding.
- Error messages will stop the creation of a software master. You must fix any build steps that contain error messages. The message specifies the error.

## Deleting a Software Master Definition

You can delete a software master definition. All records associated with the definition, such as the change table configurations, will also be deleted.

### ► To delete a software master definition

---

*From Product Packaging (GH962), choose Product Packages/J.D. Edwards Product Packaging (P9640).*

1. On Work With Software Mastering, click Find.  
Existing software master definitions appear.
2. Choose the master you want to delete, and then click Delete.  
A message box appears asking if you are sure you want to delete the software master definition.
3. Click OK.

---

## Software Master Templates

This chapter explains the components of the software master templates used by the Product Packaging tool. Templates provide default information when creating a new software master. For example, to distribute objects to a disconnected enterprise, you would choose to build a master based on the ASU (Application Software Update) CD template. The ERP 9.0 Mastering Director would use the ASU CD template to determine which director steps, build steps, and directory structure to use when creating the software master. You can customize the default information provided by the templates.

You use build steps to build a template. Build steps are the processes used to create a software master. You also can add, revise, copy, and delete software master templates.

### See Also

- *Defining a Software Master* in the *Product Packaging Guide* for information about the ERP 9.0 Mastering Director and how to indicate the template you want to use when creating your software master

## Details of All Build Step Processes

This topic explains all of the software mastering build step processes that a template can offer. Not all of these processes will appear on every template.

### Undefined

Type = 00

Performed Automatically = Not Applicable

This build step is the default process when adding a new build step to a software master or template. Once you add this build step, you need to define it for the master or template.

### Create CD File Structure

Type = 01

Performed Automatically = Yes

This build step creates the physical directory structure at the image-path location that you specified when creating the software master definition.

### Package Build

Type = 02

Performed Automatically = Yes

This build step builds the assigned package based upon the package assembly and build definitions.

### Manual Build Step

Type = 03

Performed Automatically = No, see the specific template definition in this chapter for complete information about the performance of this build step.

This build step allows the administrator to instruct the user on how to perform a process that has not yet been automated. You should verify the mastering steps and options of this step before beginning your master.

### **Pre-Build Package**

Type = 04

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

### **Pre-Build Pristine**

Type = 05

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

### **Build Cross-Reference**

Type = 06

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

### **Build Data Dictionary**

Type = 07

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

### **Build In-House Package Database**

Type = 08

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

### **Build Planner Database**

Type = 09

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

### **Build Pristine Database**

Type = 10

Performed Automatically = Partial, see the specific template definition in this chapter for complete information about this build step's performance.

This build step creates the pristine data tables in the final pristine database that corresponds to the given set of modules.

### **Build Store & Forward Database**

Type = 11

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

### **Build Standalone Database**

Type = 12

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

### **Build Change Tables**

Type = 13

Performed Automatically = Yes

This build step builds the change tables based upon the change table configuration that was set up as part of the software master definition.

### **Master Central Objects**

Type = 14

Performed Automatically = No

For PeopleSoft Internal Use Only.

### **Compress**

Type = 15

Performed Automatically = Partial, see the specific template definition in this chapter for complete information about this build step's performance.

This build step compresses the final pristine JDE Masters database into the data.cab file that ERP 9.0 places within the final image path.

### **Create INF**

Type = 16

Performed Automatically = Yes

Please DO NOT modify this file by hand. This build step updates the deployment.inf file that the installation applications use during the update installation.

### **Copy CD Directory Files**

Type = 17

Performed Automatically = Yes

This build step copies the built package to the target image path. This step also copies to the target image path any additional files defined in the software master directory structure.

If you have already built the package and do not want the mastering process to build the package again, set the status of the Package Build step to 60. When you create your software master, the process will skip the package build and when it runs this Copy CD Directory Files step, it will copy the package.

### **Virus Check**

Type = 18

Performed Automatically = Partial

For PeopleSoft Internal Use Only.

### **Windows Executable**

Type = 19

Performed Automatically = Partial, see the specific template definition in this chapter for complete information about this build step's performance.

This build step allows you to specify a Microsoft Windows executable or batch file as part of the mastering process.

### **Data Cleanup**

Type = 20

Performed Automatically = No

For PeopleSoft Internal Use Only.

### **Build Package Database**

Type = 21

Performed Automatically = Yes

For PeopleSoft Internal Use Only.

### **Batch Process**

Type = 22

Performed Automatically = Yes

This build step allows you to define a batch process to run as part of the software master definition.

## **ASU CD Template**

The ASU CD is the main template used with the Product Packaging Tools. This template is the basis for delivering ERP 9.0 objects to distributed enterprises. The following table shows the build steps and their sequence for an ASU CD:

<b>Sequence Number</b>	<b>Build Step (Type)</b>
10	Check Mastering Items (03 - Manual Build Step)

20	Cleanup Temporary Files (22 - Batch Process)
30	Cleanup Temp Master (22 - Batch Process)
40	Create CD File Structure (01 – Create the CD File Structure)
50	Build (02 – Package Build)
60	Create Database (22 – Batch Process)
70	Build Change Tables (13 – Build Change Tables)
80	Create/Load ASU Change Tables (22 - Batch Process)
90	Create/Load ASU Control Tables (22 - Batch Process)
100	Create/Load ASU Misc Tables (22 - Batch Process)
110	Create/Load New and Regen tables (22 - Batch Process)
120	Create/Load ASU OL & VL tables (22 - Batch Process)
130	ASU v/s Package Validation (22 - Batch Process)
140	Compact Database (22 - Batch Process)
150	Detach Database (22 - Batch Process)
160	Copy Database (22 - Batch Process)
170	Rename MSDE database files (22 - Batch Process)
180	Compress/Copy Database (15 - Compress)
190	Copy Package and Feature INFs (22 - Batch Process)
200	Copy CD Directory Files
210	Create INF

220	Create self-extracting executable
230	Validate the mastered CD

## Additional Build Step Information for the ASU CD Template

The following table provides additional information pertaining to a particular build step within the ASU CD template:

Sequence Number	Build Step (Type) with Additional Information
10	<p>Check Mastering Items (03 – Manual Build Step)</p> <p>Verify the mastering steps and options of the step before beginning your master. Must be executed manually before the Master CD.</p>
20	<p>Cleanup Temporary Files (22 - Batch Process)</p> <p>Launches the R9640L batch process using versions XJDE0001 through XJDE0005. This process deletes the previous software master from the build machine. This step deletes the contents of the \$TEMP\data directory. It also drops the JDEmasters database, if present, by launching UBE R9640MK.</p>
30	<p>Cleanup Temp Master (22 - Batch Process)</p> <p>Launches the R9640L batch process, version XJDE0001 to delete the contents of \$TEMP\Master folder.</p>
40	<p>Create CD File Structure (01 – Create CD Structure)</p> <p>Creates the CD file structure on the Image path.</p>
50	<p>Build (02 – Package Build)</p> <p>Builds the defined update package. Can be set to Built status if the package has run through the Package Build application.</p>
60	<p>Create Database (22 - Batch Process)</p> <p>Launches the R9640MF batch process using version XJDE0001. This process creates an empty MSDE database called JDEmasters in the following directory: \$TEMP/master.</p>
70	<p>Build Change Tables (13 – Build Change Tables)</p> <p>Builds the change tables based on the configuration that was set up during the director phase.</p>
80	<p>Create/Load ASU Change Tables (22 - Batch Process)</p> <p>Launches the R9670 batch process using version XJDE0003. This process creates change tables in the JDEmasters</p>

- database, populating the tables from the Change Table data source.
- 90            Create/Load ASU Control Tables (22 - Batch Process)
- Launches the R9670 batch process using version XJDE0001. This process creates control tables in the JDE Masters database, populating the tables from the Control Table data source.
- 100           Create/Load ASU Misc Tables (22 - Batch Process)
- Launches the R9670 batch process using version XJDE0002. This process creates miscellaneous tables in the JDE Masters database, populating the tables based on the selections you made for the objects in your ASU package, your change tables, and the software master definition.
- 110           Create/Load New & Regen Tables (22 - Batch Process)
- Launches the R96700 batch process using version XJDE0001. This process creates tables in the JDE Masters database that are marked as new or regenerate in the table change table or the table conversion scheduler.
- 120           Create/Load ASU OL & VL tables (22 - Batch Process)
- Launches the R9600400C batch process using version XJDE0001. This process copies to the JDE Masters database the Object Librarian, Versions List, package assembly information for your master. Verify that the data source, which you can set in the processing options of this version, is set correctly.
- 130           ASU v/s Package Validation (22 - Batch Process)
- Launches the R9671 batch process using version XJDE0001. This process cross validates, ensuring that objects, tables, and specifications in the ASU package definition match with the object change table, table change table, index change table, and table conversion scheduler in the software master.
- 140           Compact Database (22 - Batch Process)
- Launches the R9640MG batch process using version XJDE0001, which runs the MSDE compaction tool to compact JDE Masters MSDE Database.
- 150           Detach Database (22 - Batch Process) - - this build step launches the R9640ML batch process using version XJDE0001 which detaches the JDE Masters MSDE Database.
- 160           Copy Database (22 - Batch Process) - this build step launches the R9640E batch process using version XJDE0002. This process copies the ASU database from \$TEMP\master\JDE Masters.\*df to

- \$TEMP\data\JDEMasters.\*df.
- 170      Rename MSDE Database files (22 - Batch Process)
- Launches the R9640H batch process using version XJDE0006 and XJDE007. This process renames the JDEMasters.\*df files to packagename.\*df files, where *packagename* is the name of the package associated with the database.
- 180      Compress/Copy Database (22 - Batch Process)
- Launches R9640E using version XJDE0003. This process compresses the ASU database (packagename.\*df) files and copies them from the \$TEMP/data directory to the final software master image path as Data.cab.
- 190      Copy Package and Feature INFs (22 - Batch Process)
- Launches the R9600400E batch process using version XJDE0001. This process copies deployment features INFs, the package INFs, and the feature INFs from the deployment server to \$TEMP directories.
- 200      Copy CD Directory Files (17 – Copy CD Directory Files)
- Copies additionally specified items into the Image path. For example, all install programs are copied to the root of the Image Path.
- 210      Create INF (16 – Create INF)
- Creates the deployment INF file into the image path directory.
- 220      Create self-extracting exe (22 - Batch Process)
- Launches the R9640J batch process using version XJDE0001. This process takes the entire software master image and creates a CAB file and a self-extracting executable file in the \$TEMP/final directory. You can use either of these files to deliver the software master. Uncompress the CAB file or run the executable file on the deployment server, then use the Application Software Update Guide to update ERP 9.0 with the software master.
- 230      Validate the Mastered CD (22 - Batch Process)
- Launches R9640D version XJDE0001, which performs post-mastering validation on the master that has been created. Refer to the report output for details.

## Custom CD

The Custom CD is for general use; this CD type has no template. An ERP 9.0 administrator uses this CD type primarily to create backups of source code, documents, and so forth, while still using the Product Packaging Tools. This CD type allows you to enter a directory structure

that contains all of the files that you want loaded onto a custom CD image. Once completed, the administrator can move that image to a CD burner to create the actual CD.

## Working with Software Master Templates

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This chapter explains how to add, revise, copy, proof, and delete software master templates. Once you add a template, you can use the ERP 9.0 Mastering Director to create a software master definition using that template.

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### Note

See *Defining a Software Master* in the *Product Packaging Guide* for information about how to create a software master.

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## Adding a Software Master Template

This task explains how to add a software master template.

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### Note

If you have already set up the template and need to revise it, see *Revising a Software Master Template* in the *Product Packaging Guide*.

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### ► To add a software master template

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*From the Advanced Operations menu (GH9622), choose Mastering Templates (P9640).*

1. On Work With CD Templates, click Add.  
The Template Director form appears.
2. Click Next.
3. On the Template Information form, complete the following fields:
  - Name  
This is a read-only field. ERP 9.0 populates this field with the information you enter into the following fields. For example, if you enter release B9 with an 11 type and a 02 build phase, the name of the template will be B9-11-02. ERP 9.0 will not allow you to add a template with the same name as an already existing template.
  - Release  
Enter the release for the software master template, such as B9.
  - Type  
Enter which type of CD you want the template to define, such as an ASU CD.

- **Build Phase**  
Enter which phase of development your software master template represents, such as alpha, beta, or general availability.
  - **Description**  
Optional. Enter a description of the software master template.
4. Click Next.  
The CD Revisions form appears.
  5. Set up the build steps and directory structure for the template.

---

**Note**

See *Revising a Software Master Template* in the *Product Packaging Guide* for instructions about setting up the build steps.

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## Revising a Software Master Template

You can revise a software master template to meet your needs.

---

**Note**

If you need to add a new template, see *Adding a Software Master Template* in the *Product Packaging Guide*.

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**► To revise a software master template**

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*From the Advanced Operations menu (GH9622), choose Mastering Templates (P9640).*

1. On Work With CD Templates, click Find.  
Existing templates appear.
2. Choose the template you want to revise, and then click Select.  
The CD Revisions form appears.
3. To refresh the information shown on any tabs on the CD Revisions form, choose Refresh from the View menu.
4. To validate, in proof mode only, the information shown on any tabs, click Validate.  
A report runs that validates the definition.
5. Click the CD Information tab and, if needed, revise the following fields:
  - **Status**  
Enter the status of the template, which should be 10 In Definition.

- Description  
Optional. Enter a description of the software master template.
  - Comment  
Optional. The mastering process populates this field with status information about the process. You can also enter any additional information about the software master template, but ERP 9.0 will overwrite that information when a subsequent process completes as you define and create your software master.
6. Click the Build Steps tab and, if needed, choose a step and revise the following fields:
- Sequence  
Enter the order in which you want the step performed during the creation of the software master definition. You can use the same sequence number for multiple build steps.
  - Type  
Enter which component type you want the build step to perform. For example, you can define steps to create file structures, build a package, or create INF files.  
  
Enter the starting status of the build step, which should be 10 In Definition. The Product Packaging process changes this field during the subsequent stages of defining and creating a software master.
  - Status  
The following fields are dynamic and appear depending upon the build step you chose:
  - Description  
Enter a description about the build step. The first line of the description appears as the text for the build step. This line of text appears in the tree view on the left side of the form. You might want to enter a short descriptive name in the first line of the Description field, such as Check Mastering Items, and then press the Enter key before typing a more robust description for the step.
  - Target Folder  
Click the Target Folder button. Use the Select CD Directory form to choose the target folder for the build step you chose.
  - Executable  
Click the Executable button. Use the Select a Windows Executable form to choose an executable for this build step.
  - Value/Parameter  
Click the Value/Parameter button, and then enter a value or parameter appropriate to the step you chose. This field is dynamic. The button name is either Value or Parameter, based on the build step. The form that appears when you click the button also depends on which step you chose. For example, the Package Build step calls the Select Package Build form from which you can choose a package; and the Build Change Tables step calls

the Work With Change Table Definitions form from which you can modify the change table configuration.

7. If you need to add a step, click Add.  
ERP 9.0 creates a new step labeled Undefined and places it at the bottom of the steps.
8. Choose the Undefined step and complete the following fields:
  - Sequence
  - Type
  - Status
  - Description
  - Value
9. To add an attachment to a build step, choose the step and then choose Attachments from the View menu.  
The Media Objects form appears.

---

**Note**

See *Media Objects and Imaging* in the *System Administration Guide* for information about attaching media objects.

---

After attaching a media object, a paper clip appears in the upper-right corner of the Build Step tab for that build step.

10. To renumber your build steps, click Renumber from the Form menu.  
ERP 9.0 renumbers your build steps, which updates the Sequence field. The renumbering begins with 10 and increments each step by 10 (10, 20, 30, and so on). ERP 9.0 maintains the same build step sequence that you established.
11. To delete a step, choose the step and then click Delete.
12. Click the Directory Structure tab and, if necessary, revise each directory by choosing a directory and verifying the following fields:
  - Status  
Enter the status of the directory, which should be `10 In Definition`.
  - Target Folder  
Enter the Target Folder path for the directory you chose.
  - Source Path  
Enter the directory path of the source that will populate the component. This is the source of the data that you want to retrieve for the master and placed into the target folder (directory). You can specify this path using either a relative or absolute path.
  - File Filter

Enter the file filter (\*.\*) is the default value) to filter data files that you retrieve from the source directory. For example, you can use \*.\* to retrieve all files in the source directory.

13. To add a subdirectory, choose a directory for which you want to add a subdirectory, and then click Add. You can choose any directory, including Root.

ERP 9.0 creates a new directory labeled Undefined and places it below the directory that you chose.

14. Choose the Undefined directory and complete the following fields:

- Status
- Target Folder
- Source Path
- File Filter

15. To load a subdirectory from an enterprise network directory, click the directory that will be the root of the subdirectory that you want to load. This directory must already exist on your enterprise.

16. Click Load.

The Load Folders From Directory form appears.

17. Click Windows Folder.

The Select Directory form appears.

18. Find and choose a directory you want to load into your template, and then click OK.

19. On the Load Folders From Directory form, choose one of the following:

- Re-create subfolders  
This option replaces (deletes) the existing subdirectories and replaces them with the subdirectories you want to load into the template.
- Append to existing  
This option appends to the existing subdirectories the subdirectories you want to load into the software template.

20. If needed, click the Setup Source Directories option.

When creating the software master, turning this option on will automatically create the structure of the source directories and will copy all files within the source directories to the software master.

If you do not check Setup Source Directories, ERP 9.0 will create the source directory structure within the software master and the directories will be empty.

21. Click OK.

22. When finished revising the template, click OK.

## Copying a Software Master Template

Copying a software master template allows you to copy information from the template. This information includes the build steps and the directory structure.

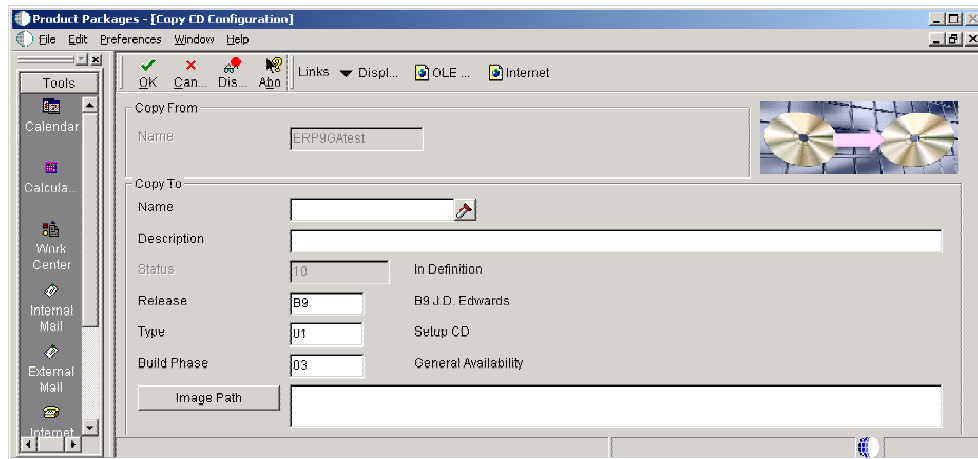
### Note

If you need to add a new software master template and cannot copy and revise an existing one, see *Adding a Software Master Template* in the *Product Packaging Guide*.

### ► To copy a software master template

From the *Advanced Operations* menu (GH9622), choose *Mastering Templates* (P9640).

1. On *Work With CD Templates*, click *Find*.  
Existing templates appear.
2. Choose the template you want to copy, and then click *Copy*.  
The *Copy CD Configuration* form appears.



3. Complete the following *Copy To* fields, and then click *OK*:
  - **Description**  
Optional. Enter a description of the software master definition.
  - **Release**  
Enter the release for the template, such as B9.
  - **Type**  
Enter which type of template you want to use when setting up your software master, such as the ASU CD template.

- **Build Phase**  
Enter which phase of development your template represents, such as alpha, beta, or general availability.

## Proofing a Software Master Template

Proofing software master templates involves creating a report that details each build step in the definition and showing the sequence of the steps and which processes, if any, each step will run when creating the actual master.

Proofing a software master template does not change the status of a build step.

### ► **To proof a software master template**

---

*From the Advanced Operations menu (GH9622), choose Mastering Templates (P9640).*

1. On Work With CD Templates, click Find.  
Existing templates appear.
2. Complete one of the following:
  - To proof one software master template, choose the template you want to create, and then choose Proof CD from the View menu.
  - To proof all software master templates for a specific release, choose Proof Release from the View menu. A form appears in which you enter the release number of the templates you want to proof.
3. On the Report Output Destination form, specify whether to send the report to a printer or to view an online version of the report using Acrobat Reader, and then click OK.  
A batch process runs a report that shows each build step in sequence and what processes, if any, each step would run when creating the actual master.

## Deleting a Software Master Template

You can delete a software master template.

### ► **To delete a software master template**

---

*From the Advanced Operations menu (GH9622), choose Mastering Templates (P9640).*

1. On Work With CD Templates, click Find.  
Existing templates appear.
2. Choose the template you want to delete, and then click Delete.  
A message box appears asking if you are sure you want to delete the software master template.
3. Click OK.

## Change Table Configuration

After you have created the configuration of a change table, you can revise, copy, or delete it.

### See Also

- ❑ *Configuring Change Tables* in the *Product Packaging Guide* for information on how to create a change table configuration

### ► To revise or submit change tables

From the *Product Packaging* menu (GH962), choose *Change Table Configurations* (P9642).

	Source Release	Target Release	Source Environment	Change Table Type	Batch Application	Version
<input checked="" type="checkbox"/>	B7333	B7333SM	ADEVHPO2	Data Dictionary	R989200T	XJDE0001

1. On *Work With Change Table Definitions*, complete the following field, and then click *Find*:

- **CD Name**

Enter the name of the software master for which you want to view change table configurations.

Existing change table configurations appear with the following:

- A check mark appears to the left of each table configuration row that either completed its build successfully or is ready to be built.
- A circle with a line through it appears to the left of any table configuration that failed its build or is not at a valid status for the configuration to be submitted.

- If you need to rerun a particular change table batch process and the change table row does not have a check mark to the left of it, correct any issue that might exist, choose the change table row, and click Select.

- On the Change Table Revisions form, complete the following field and click OK:
  - Configuration Status
 

Change to or verify that the status is 30 (Validated), which allows this change table to be built and submitted to the software master.
- To submit change tables, complete one of the following:
  - To submit an individual change table row, choose the row and then choose Submit from the Row menu.
  - To submit multiple change table rows, choose the rows using the Control or Shift keys with your mouse, and then choose Submit from the Row menu.
  - To submit all of the change table rows, choose Submit from the Form menu.

ERP 9.0 builds the change tables you chose and includes them with the software master. If you revised existing change tables, they will replace themselves in the software master. If you added change tables, they will be appended to the software master.

## Revising or Submitting Change Tables

---

If you need to revise or add change tables, you can build and submit change table configurations to a software master after you have created the software master. Ignore this task if you have not yet created your software master. If the template you chose for your

software master required change tables, the software master will build the change tables you specified during the setup of your software master definition.

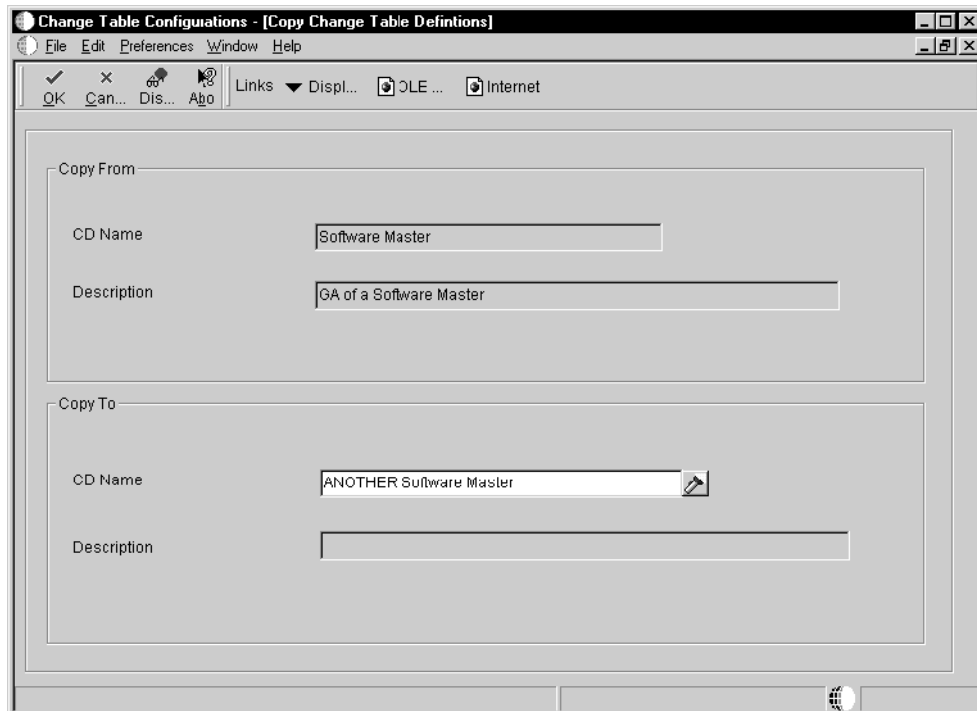
## Copying a Change Table Configuration

You copy change table configurations from one master definition to another master definition. This process copies all change table configurations associated with the master from which you are copying.

### ► To copy a change table configuration

*From the Product Packaging menu (GH962), choose Change Table Configurations (P9642).*

1. On Work With Change Table Definitions, complete the following field:
  - CD Name  
Enter the name of the software master from which you want to copy its change table configurations.
2. Click Find.  
Existing change table configurations appear.
3. Choose a change table row and click Copy.



4. On Copy Change Table Definitions, complete the following field, and then click OK:
  - CD Name

Enter the name of the software master definition to which you want to copy the change table configurations. The master you are copying to must already exist.

## **Deleting a Change Table Configuration**

---

You can delete change table configurations that you have added to your software master definition.

### **► To delete a change table configuration**

---

*From the Product Packaging menu (GH962), choose Change Table Configurations (P9642).*

1. On Work With Change Table Definitions, complete the following field, and then click Find:
  - CD NameExisting change table configurations appear.
2. Choose a change table row and click Delete.

---

## Data Cleanup

Use the data cleanup application to create procedures and templates to clean up your software master data. The data cleanup application can delete obsolete data, standardize existing data, and provide integrity, summary, and error reports about the data. You can clean up the following:

- Data dictionary tables and specifications
- AutoPilot tables
- User defined codes and types
- Menu tables
- Object Librarian tables
- Central Objects tables

---

## Working with Data Cleanup Procedures

The Product Packaging Tools includes an application that allows you to add, revise, copy, and delete a set of data cleanup steps. You define how you want these steps to clean up your software master data.

### Adding a Data Cleanup Procedure

You can add a data cleanup procedure. This function allows you to add procedure information and the steps necessary to clean up data.

---

#### Note

Even though this Product Packaging Tools function is primarily for creating data cleanup procedures, you can use it to create any type of procedure to run a batch process or Microsoft Windows executable.

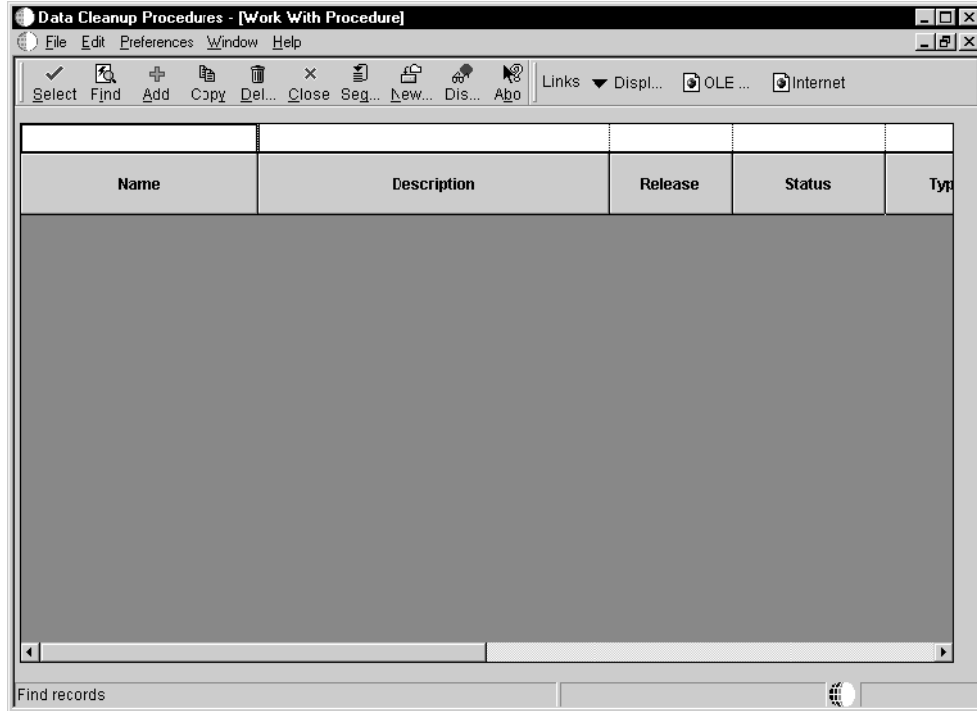
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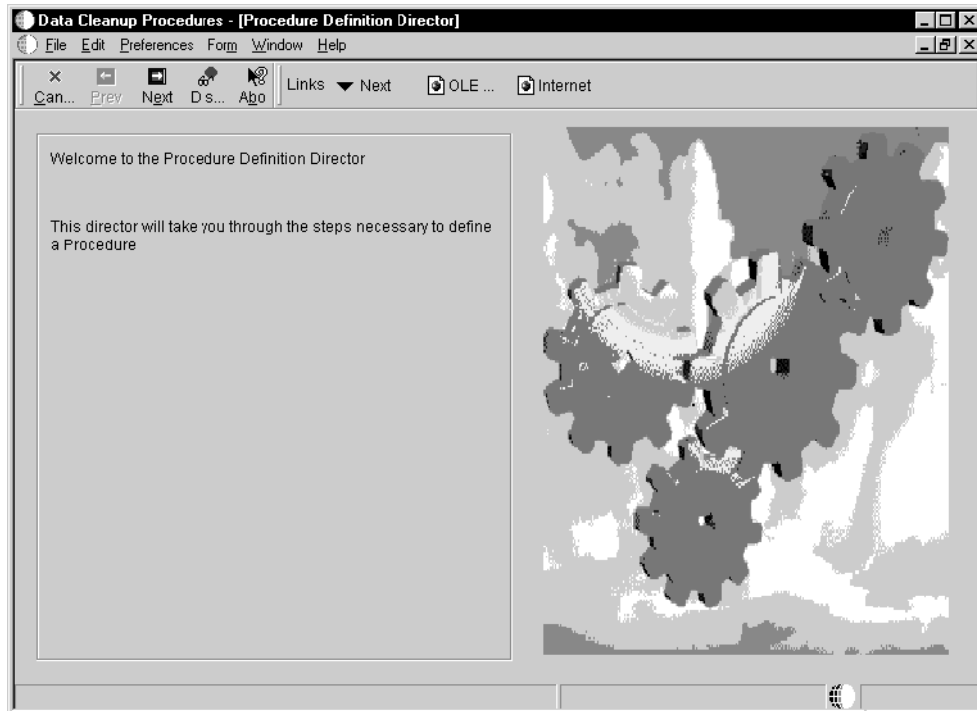
#### ► To add a data cleanup procedure

---

*From the Product Packaging menu (GH962), choose Data Cleanup Procedure Templates (P9646).*



1. On Work With Procedure, click Add.



2. On the Procedure Definition Director, click Next.

Enter information about your new procedure.

Enter the unique name and other information related to the procedure

Name

Description

Comment

Status   In Definition

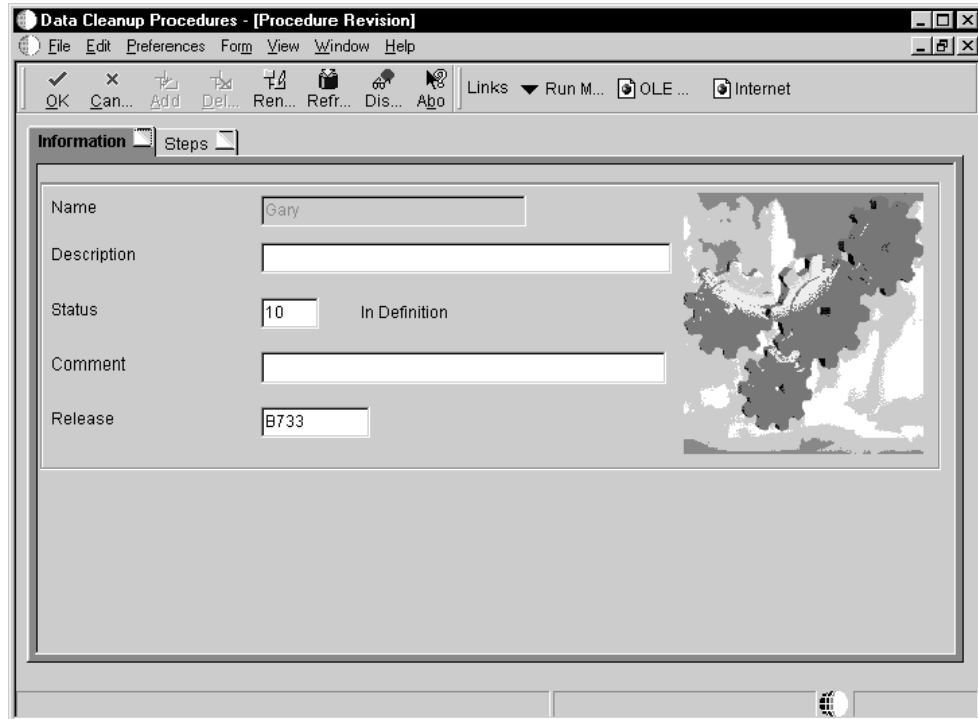
Procedure Release

Template Name

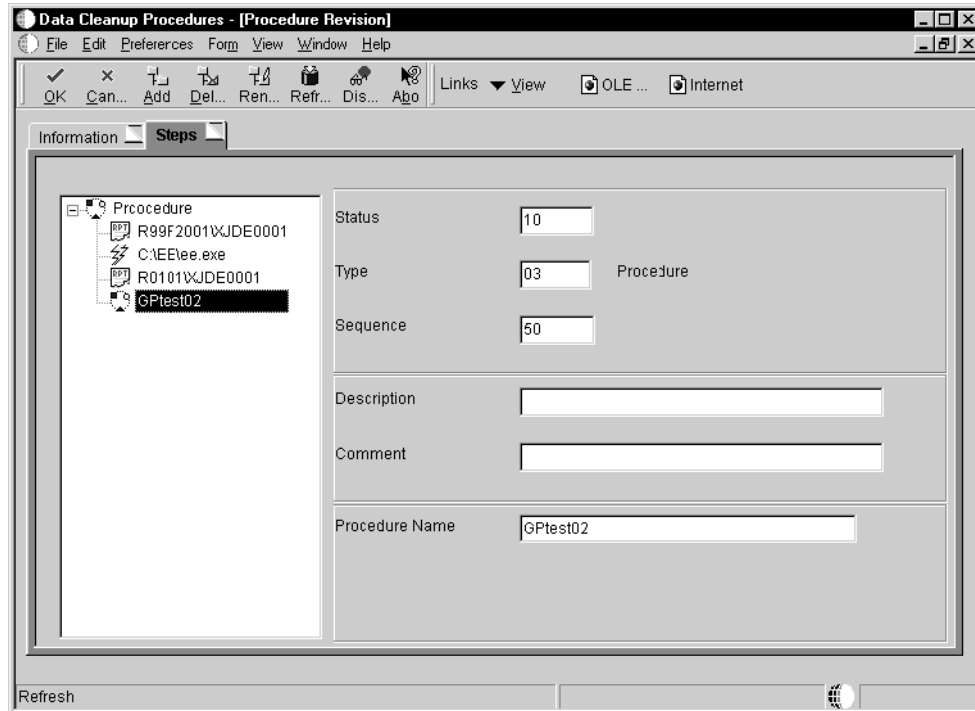
3. On Add Procedure, complete the following fields:

- Name  
Enter a unique name, such as Object Librarian Cleanup, for the data cleanup procedure you are adding.
- Description  
Optional. Enter a description of the data cleanup procedure.
- Comment  
Optional. Enter a comment about the data cleanup procedure.
- Status  
Verify the status of the data cleanup procedure. Set the status to 30 (Validated) before you execute the procedure.
- Procedure Release  
Enter the ERP 9.0 release that pertains to the data cleanup procedure, such as B9. This value is the release currently installed on the client workstation you are using.
- Template Name  
Optional. Enter the name of the data cleanup template that you want to work from for the procedure you are adding.

4. Click Next.



5. On the Procedure Revision form, choose Refresh from the View menu to refresh the information shown on either the Information tab or the Steps tab of the Procedure Revision form.
6. Click the Information tab, and complete the following fields:
  - Description
  - Status
  - Comment
  - Release
7. Click the Steps tab.



8. To add a step, click Add.

ERP 9.0 creates a new step labeled Undefined and places it at the end of the highlighted procedure displayed in the tree. If you add a step to a sub-procedure, the Undefined step appears at the end of that sub-procedure. A form appears asking you to verify your add to the sub-procedure.

9. Choose the Undefined step and complete the following fields:

- Status

Enter the status of the data cleanup build step. Set the status to 30 (Validated) before you execute the step.

- Type

Enter which type of build step you want to add. For example, you can add steps that are batch processes, a Microsoft Windows executable program, or another data cleanup procedure.

- Sequence

ERP 9.0 automatically displays a sequence number based upon where you add the build step. You can change this sequence number to move the build step up or down in the procedure. You can use the same sequence number for multiple build steps.

- Description

Optional. Enter a description of the data cleanup build step.

- Comment

Optional. Enter a comment about the data cleanup build step.

10. Complete the following fields, which appear if you are adding a batch process:

- Object Name

Enter an ERP 9.0 name of a batch process. For example, enter R9647R to have the step execute the Object Librarian - Object Relationship Cleanup report.

- Version

Enter the name of the report version for the batch process you entered; for example, XJDE0002, Final Mode version.

11. Complete the following fields, which appear if you are adding a Microsoft Windows executable program:

- Executable

Enter the name of a Microsoft Windows-compatible executable program. For example, the `xcopy.exe` program.

- Parameters

Enter the parameters for the executable program. You can enter command-line switches, directories, and files. For example, for the `xcopy.exe` program, you could enter a copy-from parameter of `c:\temp\*.*` and you can enter a command-line switch of `\s`.

12. Complete the following field, which appears if you are adding a data cleanup procedure:

- Procedure Name

Enter the name of an existing data cleanup procedure. The data cleanup procedure that you enter must already exist. If the procedure appears on the visual-assist form, then it exists.

13. When you tab out of the last field or choose a step in the tree structure on the left side of the form, the data cleanup application saves your step.

14. When you are finished adding steps, click OK.

## Revising a Data Cleanup Procedure

You can revise the information and steps within a data cleanup procedure that you already created. Be aware that if you revise a data cleanup procedure, those revisions are reflected wherever that procedure is used, such as when the revised procedure is nested within another procedure.

---

### Note

To add a new data cleanup procedure, see *Adding a Data Cleanup Procedure* in the *Product Packaging Guide*.

---

## ► To revise a data cleanup procedure

---

*From the Product Packaging menu (GH962), choose Data Cleanup Procedure Application (P9646).*

1. On Work With Procedure, click Find.  
Existing data cleanup procedures appear.
2. Choose the procedure you want to revise, and then click Select.  
T appears.
3. On the Procedure Revision form, choose Refresh from the View menu to refresh the information shown on either the Information tab or the Steps tab of the Procedure Revision form.
4. Click the Information tab, and revise the following fields:
  - Description  
Optional. Enter a description of the data cleanup procedure.
  - Status  
Verify the status of the data cleanup procedure. Set the status to 30 (validated) before you execute the procedure.
  - Comment  
Optional. Enter a comment about the data cleanup procedure.
  - Release  
Verify the ERP release that pertains to the data cleanup procedure, such as B9. This value is the release currently installed on the client workstation you are using.
5. Click the Steps tab.
6. To revise a build step, choose the step, and complete the following fields:
  - Status  
Verify the status of the data cleanup build step. Set the status to 30 (Validated) before you execute the step.
  - Type  
Verify which component type you want the build step to perform. For example, you can define steps as a batch process, a Microsoft Windows executable, or another data cleanup procedure.
  - Sequence  
Verify the order in which you want the step performed during the execution of the procedure. You can use the same sequence number for multiple build steps.
  - Description  
Optional. Enter a description of the data cleanup build step.
  - Comment

Optional. Enter a comment about the data cleanup build step.

The following fields appear if you are revising a batch process:

- Object Name  
Verify the ERP 9.0 name of the batch process.
- Version  
Verify the name of the report version for the batch process.

The following fields appear if you are revising a Microsoft Windows executable program:

- Executable  
Verify the Microsoft Windows executable program.
- Parameters  
Verify the parameters of the executable.

The following field appears if you are revising a data cleanup procedure:

- Procedure Name  
Verify the name of the data cleanup procedure.

7. To renumber your build steps, from the View menu, click Renumber.  
ERP 9.0 renumbers your build steps and updates the Sequence field. The renumbering begins with 10 and increments each step by 10 (10, 20, 30, and so on). ERP 9.0 keeps the build steps in the same sequence that you or the data cleanup template established.
8. To delete a step, choose the step, and click Delete.
9. When you are finished revising the data cleanup procedure, click OK.

## Copying a Data Cleanup Procedure

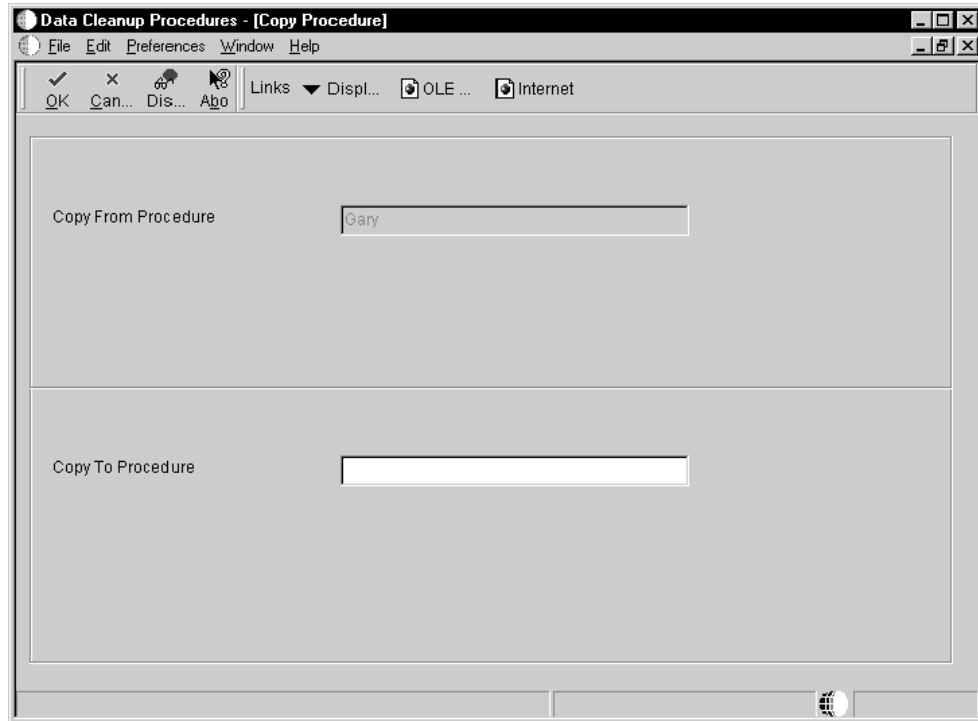
You can copy a data cleanup procedure that you already created.

### ► To copy a data cleanup procedure

---

*From the Product Packaging menu (GH962), choose Data Cleanup Procedure Application (P9646).*

1. On Work With Procedure, click Find.  
Existing data cleanup procedures appear.
2. Choose the procedure you want to copy, and then click Copy.



3. On the Copy Procedure form, complete the following fields and click OK:
  - Copy From Procedure  
Enter the name of an existing data cleanup procedure.
  - Copy To Procedure  
Enter the name that you want to call the new data cleanup procedure.

## Executing a Data Cleanup Procedure and Build Step

You can execute a data cleanup procedure and build step from the data cleanup application.

---

### Note

While the following task explains how to execute procedures from the data cleanup application, you can also use the software master build steps to define a step that executes your data cleanup. See *Creating a Software Master* in the *Product Packaging Guide* for information about adding build steps to the software master definition.

---

---

### ► To execute a data cleanup procedure and build step

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*From the Product Packaging menu (GH962), choose Data Cleanup Procedure Application (P9646).*

1. On Work With Procedure, click Find.

Existing data cleanup procedures appear.

2. To execute the entire procedure, complete one of the following:
  - On the Work With Procedures form, choose the procedure and, from the Row menu, choose Execute.
  - On the Procedure Revision form, choose the main data cleanup procedure and, from the View menu, choose Execute Step.
  - On the Procedure Revisions form, from the Form menu, choose Run Main Procedure.

These options execute the entire procedure. If it executes successfully, ERP 9.0 updates the procedure and the build step statuses to 60 (Built).

3. To execute individual build steps, on the Work With Procedures form, choose a procedure and then click Select.
4. On the Procedure Revision form, click the Steps tab.
5. Choose the build step that you want to execute and, from the View menu, choose Execute Step to process only that step.

This option executes the step. If the step executes successfully, ERP 9.0 updates the step status to 60 (Built). If you execute a data cleanup procedure step, all of its subordinate steps also execute, including any sub-procedures.

## Deleting a Data Cleanup Procedure

When you delete a data cleanup procedure, the application deletes all records associated with the procedure, including its location as a subprocedure under other data cleanup procedures.

### ► To delete a data cleanup procedure

---

*From the Product Packaging menu (GH962), choose Data Cleanup Procedure Application (P9646).*

1. On Work With Procedure, click Find.  
Existing data cleanup procedures appear.
2. Choose the procedure you want to delete, and then click Delete.  
A message box appears to verify that you want to delete the procedure.
3. Click OK.

## Working with Data Cleanup Templates

---

Data cleanup templates are optional for use in data cleanup. You can use them as a guide to building your own data cleanup procedures. As with procedures, you can add, revise, copy, and delete templates.

## See Also

- ❑ *Working with Data Cleanup Procedures* in the *Product Packaging Guide* for information about procedures

## Adding a Data Cleanup Template

Adding a data cleanup template allows you to add template information and the steps you want for cleaning up data.

### ► To add a data cleanup template

---

*From the Advanced Operations menu (GH9622), choose Data Cleanup Procedure Templates (P9646).*

1. On Work With Procedure, click Add.
2. On the Template Definition Director form, click Next.
3. On the Add Template form, complete the following fields:
  - Name  
Enter a unique name, such as Object Librarian Cleanup, for the data cleanup template you are adding.
  - Description  
Optional. Enter a description of the data cleanup template.
  - Comment  
Optional. Enter a comment about the data cleanup template.
  - Status  
Enter a status of 10 (In Definition).
  - Procedure Release  
Enter the ERP release that pertains to the data cleanup template, such as B9. This value is the release currently installed on the client workstation you are using.
  - Template Name  
Enter the name of another data cleanup template that you want to work from for the template you are adding.
4. Click Next.
5. On the Template Revision form, to refresh the information shown on either tab of the Template Revision form, choose Refresh from the View menu.
6. Click the Information tab, and complete the following fields:
  - Description
  - Status
  - Comment
  - Release

7. Click the Steps tab.
8. To add a step, click Add

ERP 9.0 creates a new step labeled Undefined and places it at the end of the highlighted procedure displayed in the tree. If you add a step to a sub-procedure, the Undefined step appears at the end of that sub-procedure. A form appears asking you to verify your add to the sub-procedure; the add changes that procedure, whether it is a sub-procedure or not, wherever it appears.
9. Choose the Undefined step and complete the following fields:
  - Status

Enter the status of the data cleanup build step. Set the status to 10 (In Definition).
  - Type

Enter which type of build step you want to add. For example, you can add steps that are batch processes, a Microsoft Windows executable program, or another data cleanup procedure or template.
  - Sequence

ERP 9.0 automatically displays a sequence number based upon where you add the build step. You can change this sequence number to move the build step up or down in the template. You can use the same sequence number for multiple build steps.
  - Description

Optional. Enter a description of the data cleanup build step.
  - Comment

Optional. Enter a comment about the data cleanup build step.
10. Complete the following fields, which appear if you are adding a batch process:
  - Object Name

Enter an ERP 9.0 name of a batch process. For example, enter R9647R to have the step execute the Object Librarian - Object Relationship Cleanup report.
  - Version

Enter the name of the report version for the batch process you entered. For example, XJDE0002, the Final Mode version.
11. Complete the following fields, which appear if you are adding a Microsoft Windows executable program:
  - Executable

Enter the name of a Microsoft Windows-compatible executable program. For example, the `xcopy.exe` program.
  - Parameters

Enter the parameters for the executable program. You can enter command-line switches, directories, and files. For example, for the `xcopy.exe` program, you

could enter a copy-from parameter of `c:\temp\*. *` and you can enter a command-line switch of `\s`.

12. Complete the following field, which appears if you are adding a data cleanup procedure:
  - Procedure Name  
Enter the name of an existing data cleanup procedure. The data cleanup procedure that you enter must already exist. If the procedure appears on the visual-assist form, then it exists.
13. When you tab from the last field or choose a step in the tree structure on the left side of the form, the data cleanup application saves your step.
14. When you are finished adding steps, click OK.

## Revising a Data Cleanup Template

You can revise a data cleanup template that you already created in order to revise the information and steps you created within the template.

---

### Note

If you need to add a new data cleanup template, see *Adding a Data Cleanup Template* in the *Product Packaging Guide*.

---

### ► To revise a data cleanup template

---

*From the Advanced Operations menu (GH9622), choose Data Cleanup Procedure Templates (P9646).*

1. On Work With Procedure, click Find.  
Existing data cleanup templates appear.
2. Choose the template you want to revise, and then click Select.
3. On the Procedure Revision form, to refresh the information shown on either tab of the Template Revisions form, choose Refresh from the View menu.
4. Click the Information tab, and revise the following fields:
  - Description  
Optional. Enter a description of the data cleanup template.
  - Status  
Verify the status of the data cleanup template. Set the status to 10 (In Definition) before you execute the template.
  - Comment  
Optional. Enter a comment about the data cleanup template.
  - Release

Verify the ERP 9.0 release that pertains to the data cleanup template, such as B9. This value is the release currently installed on the client workstation you are using.

5. Click the Steps tab.
6. To revise a build step, choose the step, and complete the following fields:
  - Status  
Verify the status of the data cleanup build step. Set the status to 30 (validate) before you execute the step.
  - Type  
Verify which component type you want the build step to perform. For example, you can define steps as a batch process, a Microsoft Windows executable, or another data cleanup template.
  - Sequence  
Verify the order in which you want the step performed during the execution of the procedure. You can use the same sequence number for multiple build steps.
  - Description  
Optional. Enter a description of the data cleanup build step.
  - Comment  
Optional. Enter a comment about the data cleanup build step.

The following fields appear if you are revising a batch process:

- Object Name  
Verify the ERP 9.0 name of the batch process.
- Version  
Verify the name of the report version for the batch process.

The following fields appear if you are revising a Microsoft Windows executable program:

- Executable  
Verify the Microsoft Windows executable program.
- Parameters  
Verify the parameters of the executable.

The following field appears if you are revising a data cleanup procedure:

- Procedure Name  
Verify the name of the data cleanup procedure.

7. To renumber your build steps, from the View menu, click Renumber.

ERP 9.0 renumbers your build steps and updates the Sequence field. The renumbering begins with 10 and increments each step by 10 (10, 20, 30, and so on). ERP 9.0 keeps the build steps in the same sequence that you established.

8. To delete a step, choose the step, and then click Delete.
9. When you are finished revising the data cleanup template, click OK.

## Copying a Data Cleanup Template

You can copy a data cleanup template that you already created.

### ► To copy a data cleanup template

---

*From the Advanced Operations menu (GH9622), choose Data Cleanup Procedure Templates (P9646).*

1. On Work With Procedure, click Find.  
Existing data cleanup templates appear.
2. Choose the template you want to copy, and then click Copy.
3. On the Copy Procedure form, complete the following fields and click OK:
  - Copy From Procedure  
Enter the name of an existing data cleanup template.
  - Copy To Procedure  
Enter the name for the new data cleanup template.

## Deleting a Data Cleanup Template

You can delete a data cleanup procedure. The application deletes all records associated with the procedure, including its location as a subprocedure under other data cleanup procedures.

### ► To delete a data cleanup template

---

*From the Advanced Operations menu (GH9622), choose Data Cleanup Procedure Templates (P9646).*

1. On Work With Procedure, click Find.  
Existing data cleanup templates appear.
2. Choose the master you want to delete, and then click Delete.  
A message box appears to verify that you want to delete the template.
3. Click OK.

---

## Relative and Absolute Paths

An absolute path name begins with the root directory and details the entire path, such as `Z:\DepServer\CD Templates\Partial Update`. A relative path name begins with a token, such as `$DEP`. The token represents at least the root directory and possible contiguous directory paths. For example, `$DEP` might represent `Z:\DepServer`. This relative path might appear within an applicable field as `$DEP\CD Templates\Partial Update`. The following list shows the relative path tokens you can use:

- `$DEP`  
Represents the root directory where ERP 9.0 is installed on your deployment server
- `$IMAGE`  
Represents the image path of your software master
- `$CLIENT`  
Represents the root directory where ERP 9.0 is installed on the workstation you are currently using
- `$TEMP`  
Represents the Microsoft Windows temporary directory of the workstation you are currently using

You do not need to define the tokens. The Product Packaging Tool automatically resolves the token values based on your ERP 9.0 installation and other information available to it.

---

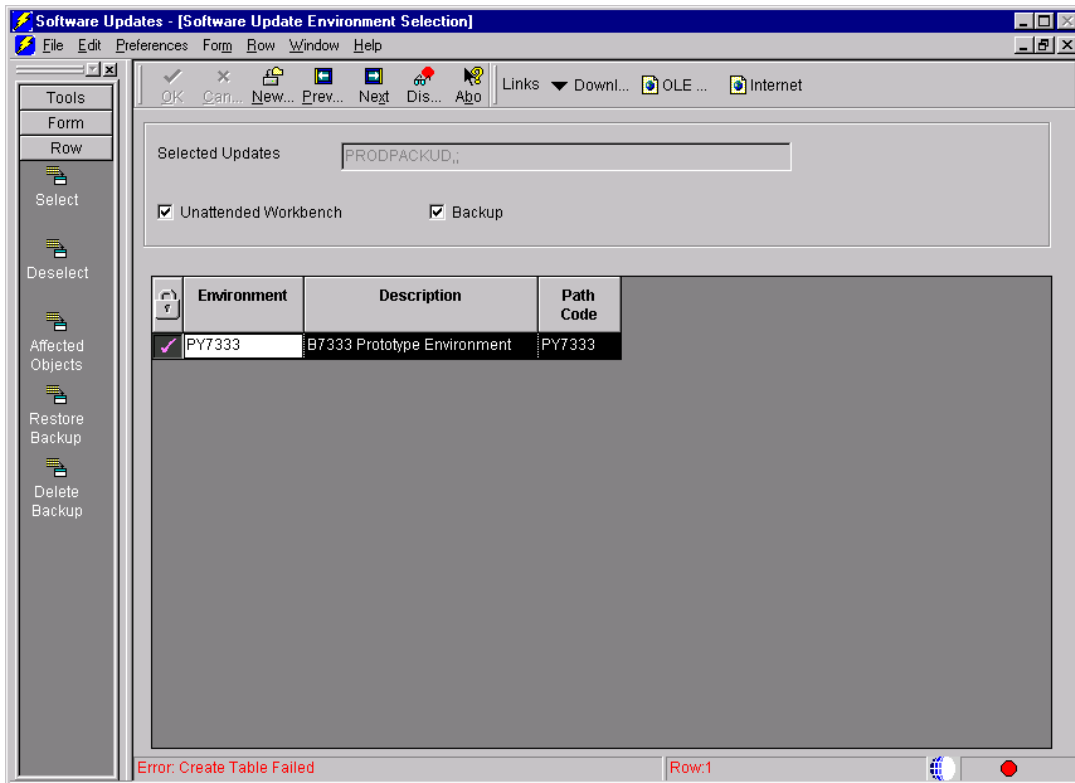
## Using Relative Path Tokens

You use relative path token within a field.

# Troubleshooting: Error Backing Up Tables in the Software Update Application

## Problem

In the Software Updates application, after choosing the path code and backup, the error message Create Table Failed displays and the application stops processing.



The jde.log file reports the following error:

- JDB9900245 - Failed to find F98611 OWBAK\_PRODPACKUD\_PY9 in cache
- JDB3100011 - Failed to get location of table F983051 for environment JDEPLAN
- JDB2100004 - Failed to open table

## Solution

The Software Update application creates a new ERP 9.0 data source called OWBAK\_PACKAGE\_NAME\_PATHCODE that points to a backup database called Planner\Package\PACKAGE\_NAME\PATHCODE.bak\data\OWBAK\_packagename\_pathcode.mdf and OWBAK\_packagename\_pathcode.idf. Do the following to troubleshoot the problem:

4. Ensure that the latest Planner update is installed before you install the product package.
5. Open the Database Data Sources application P986115 and verify that the data source OWBAK\_PACKAGE\_NAME\_PATHCODE is created, where PACKAGE\_NAME is the product package name in all UPPERCASE letters, and

*PATHCODE* is the chosen path code from the Software Updates application. If the data source exists but is not in all UPPERCASE letters, manually delete that data source item and create a new data source item as follows:

<b>Data Source Name:</b>	OWBAK_PACKAGE_NAME_PATHCODE
<b>Data Source Type:</b>	A – Access
<b>DLL Name:</b>	JDBODBC.DLL
<b>Database Name:</b>	OWBAK_PACKAGE_NAME_PATHCODE
<b>Server Name:</b>	LOCAL
<b>Platform:</b>	LOCAL

6. Verify that the ODBC data source is created and is pointing to a valid location and database.
7. Exit ERP 9.0, log on again, and try the process again.

#### ► To use relative path tokens

---

From a field that allows relative paths, enter a token followed by the remainder of the path needed for that field.

For example:

```
$DEP\CD Templates\Partial Update
```

## Converting Relative and Absolute Paths

---

ERP 9.0 allows you to convert relative path tokens and absolute path names for those fields that accept them within the Product Packaging Tools. If any fields use a token, you can convert the token into an absolute path or you can convert the absolute path into a token. For example, you can convert any instance of `$DEP` into `Z:\DepServer` or you can convert `Z:\DepServer` into `$DEP`.

#### ► To convert relative and absolute paths

---

*From the Product Packaging menu (GH962), choose Product Packages (P9640).*

1. On Work With Software Mastering, click Find.  
Existing software masters appear.
2. Choose the master for which you want to convert relative and absolute paths, and then choose Convert Paths from the Row menu.
3. On Report Output Destination, choose to send the report to a printer or to your screen, and then click OK.

ERP 9.0 converts the absolute and relative paths for any fields within the Product Packaging Tools to which this applies.

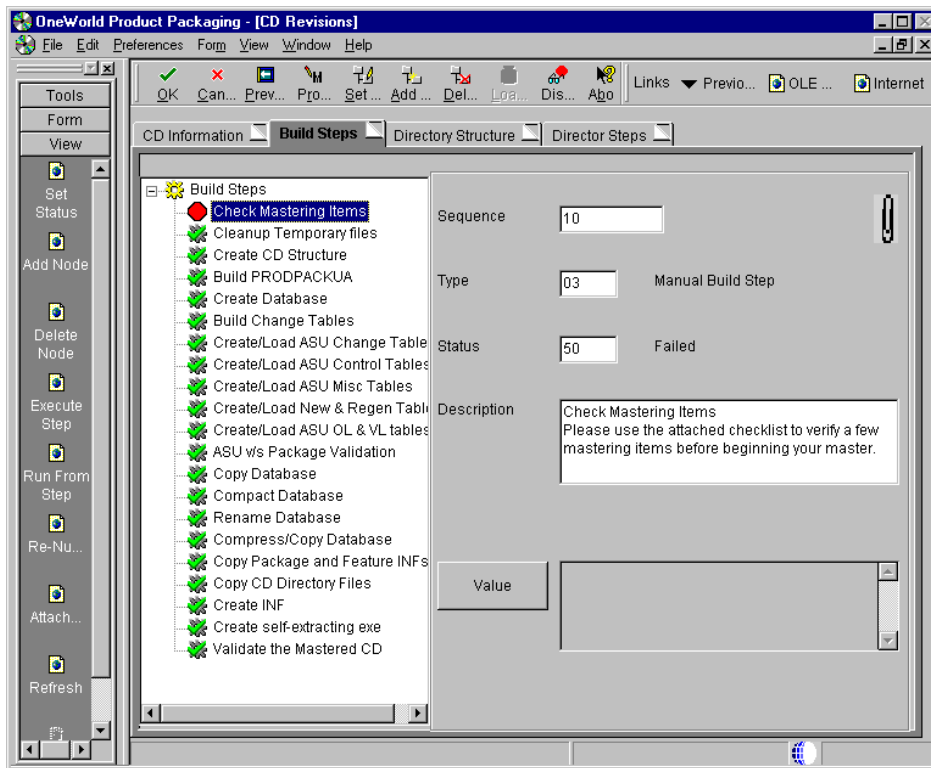
# Troubleshooting: Failure during Check Mastering Items Step

## Problem

When mastering the CD, the process fails during the Check Mastering Items step.

## Solution

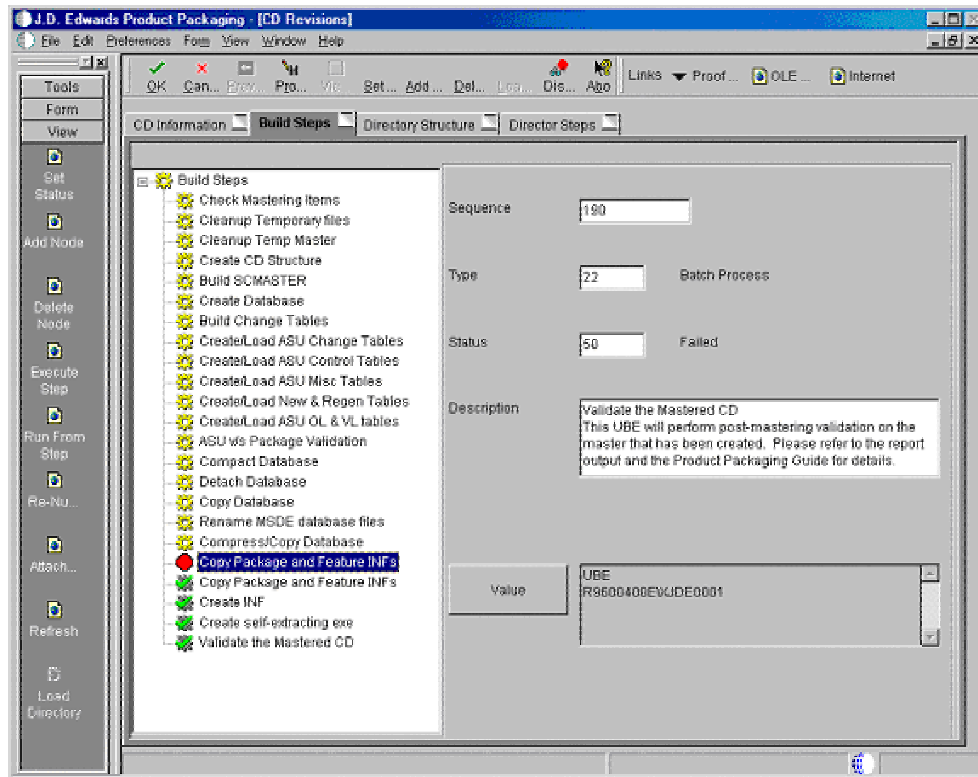
This step is a manual build; it must be executed manually. Highlight the step and choose Execute Step from the View exit menu. Once that is executed, click Master CD and then proceed.

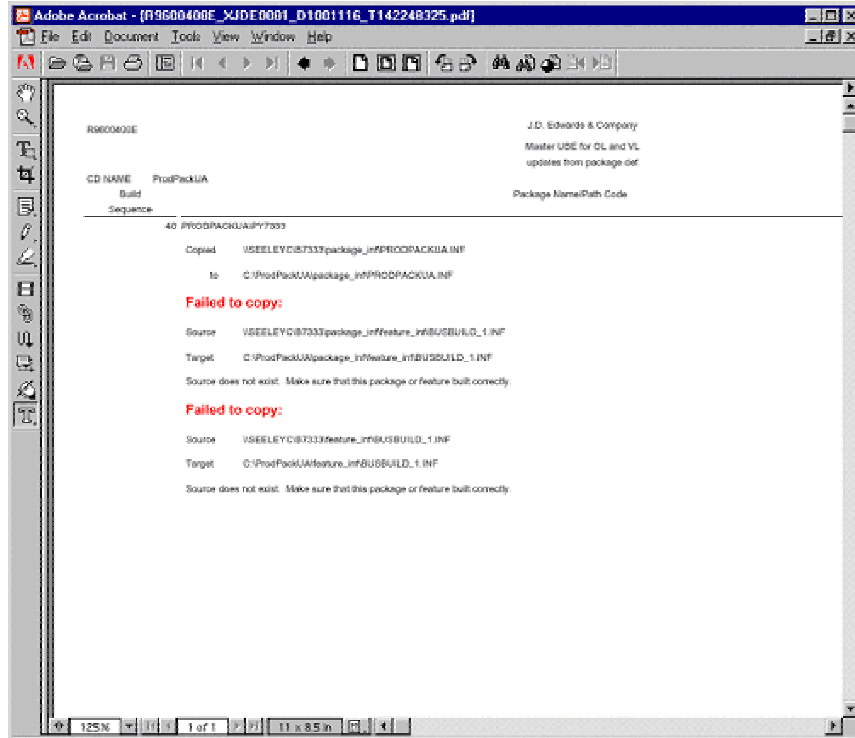


# Troubleshooting: Failure to Build the Feature INF File

## Problem

The product packaging mastering process fails at the build step Copy Package and Feature INFs - report R9600400E. Because features are a part of the ERP 9.0 Package Build process, update packages do not build feature INF files. A sample report is shown below.





## Solution

If Features are included in the chosen update package, be sure that the feature INF files were created previously.

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## Note

See *Understanding Feature INF Files* and other related topics in the *Package Management Guide* for instructions to complete this task.

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## Troubleshooting: JDE Masters Database Not Populated

### **Problem**

The build process completes without error but no tables exist in the JDE Masters database in the \$TEMP\master directory. This error occurs when the OneWorld - Product Packaging data source is not set up correctly in the database data sources.

### **Solution**

Reconfigure the database data source for OneWorld - Product Packaging, and then repeat the build process.

---

## Troubleshooting: Failure to Copy Change Tables

### **Problem**

No change tables (for instance, F960004 and F960005) exist in the JDE Masters database, and the jde.log file lists several errors reporting that it cannot find these tables in the Control Tables. This problem indicates that the change tables do not exist in the mastering environment.

### **Solution**

Verify that the tables exist and are set up correctly in the mastering environment.

---

## Troubleshooting: Failure to Copy Custom Tables

### **Problem**

Custom tables were not copied to the JDE Masters database, even though these tables were included in the update package and exist in the environment that the package is built from. This problem is an indication that the source environment specified in the change table configurator is not set up correctly or that the table exists in that environment.

### **Solution**

Verify that the specified environment is valid, has tables associated with the environment, and that the custom table cannot be found in that environment.

---

## Troubleshooting: Unable to Find Product Package after Installation

### **Problem**

After running the install manager to install the Software Master on the new system, the product package is not listed in the Software Updates application. This occurs because the package name does not match the product package name.

### **Solution**

Re-master the Software Master and ensure that the update package name is the same as the product package name. Also, make sure that you have the latest Planner update installed.

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## Troubleshooting: Problems with Object Librarian Records

### **Problem**

A potential problem exists for objects that belong to a project in the original system that was created with a SAR that contains an alpha character. This problem would be evident when trying to enter that project after installation on the destination system.

### **Solution**

After the package is installed on the destination deployment server, open the created OneWorld - Product Packaging JDE Masters database and modify the F9861 table. In the SIMSAR column, make sure that no records have alpha characters for values. Change all alpha characters to 0.