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JD Edwards EnterpriseOne Tools 8.96 Software Update Guide

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JD Edwards EnterpriseOne Tools 8.96 Software Update Guide
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Contents

About This Documentation Preface

JD Edwards EnterpriseOne implementation guides provide you with the information that you need to implement and use JD Edwards EnterpriseOne applications from Oracle.

This preface discusses:

- JD Edwards EnterpriseOne application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common fields in implementation guides.

Note. Implementation guides document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common fields for the section, chapter, implementation guide, or product line. Fields that are common to all JD Edwards EnterpriseOne applications are defined in this preface.

JD Edwards EnterpriseOne Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use JD Edwards EnterpriseOne applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using JD Edwards EnterpriseOne menus, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your JD Edwards EnterpriseOne applications most effectively.

Application Fundamentals

Each application implementation guide provides implementation and processing information for your JD Edwards EnterpriseOne applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals implementation guide. Most product lines have a version of the application fundamentals implementation guide. The preface of each implementation guide identifies the application fundamentals implementation guides that are associated with that implementation guide.

The application fundamentals implementation guide consists of important topics that apply to many or all JD Edwards EnterpriseOne applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals implementation guides. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your Implementation Guides Library. You'll find a variety of useful and timely materials, including updates to the full line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guides CD-ROM.

Important! Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Ordering Printed Documentation

You can order printed, bound volumes of the complete line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guide CD-ROM. Oracle makes printed documentation available for each major release of JD Edwards EnterpriseOne shortly after the software is shipped. Customers and partners can order this printed documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of Oracle's PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners, the book print vendor, at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs) (JD Edwards EnterpriseOne only)	Implement, Optimize, and Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
Implementation guides support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in implementation guides:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and JD Edwards EnterpriseOne or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

Implementation guides contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the JD Edwards EnterpriseOne system.

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

Implementation guides provide cross-references either under the heading "See Also" or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in implementation guides:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in implementation guides:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about implementation guides and other Oracle reference and training materials. Please send your suggestions to Documentation Manager, Oracle Corporation, 7604 Technology Way, Denver, CO, 80237. Or email us at documentation_us@oracle.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Fields Used in Implementation Guides

Address Book Number Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant ID, participant number, and so on.

As If Currency Code Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code enables you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.

Batch Number Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).

Batch Date Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.

Batch Status Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:

Blank: Batch is unposted and pending approval.

A: The batch is approved for posting, has no errors and is in balance, but has not yet been posted.

D: The batch posted successfully.

E: The batch is in error. You must correct the batch before it can post.

P: The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to *E*.

U: The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.

Branch/Plant Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.

Business Unit Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.

Category Code Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.

Company Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.

Currency Code Enter the three-character code that represents the currency of the transaction. JD Edwards EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.

Document Company Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.

If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number — Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

Document Type — Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. JD Edwards EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date — Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and **Fiscal Year** — Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

G/L Date (general ledger date) — Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

JD Edwards EnterpriseOne Tools Software Update Preface

This preface discusses JD Edwards EnterpriseOne Software Update companion documentation.

JD Edwards EnterpriseOne Software Update Companion Documentation

Additional, essential information describing the setup and design of Oracle's JD Edwards EnterpriseOne Tools resides in companion documentation. The companion documentation consists of important topics that apply to Oracle's JD Edwards EnterpriseOne Software Updates as well as other JD Edwards EnterpriseOne Tools. You should be familiar with the contents of these companion guides:

- JD Edwards EnterpriseOne Tools 8.96 System Administration Guide
- JD Edwards EnterpriseOne Tools 8.96 Server and Workstation Administration Guide

See Also

JD Edwards EnterpriseOne Tools 8.96 System Administration Guide

JD Edwards EnterpriseOne Tools 8.96 Server and Workstation Administration Guide

CHAPTER 1

Getting Started with JD Edwards EnterpriseOne Software Update

This chapter provides an overview of JD Edwards EnterpriseOne Software Update and discusses update implementation.

Software Update Overview

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

- Electronic Software Update (ESU) is a fix to problem reported on a specific JD Edwards EnterpriseOne application or report. The Update Center is the distribution point for all ESUs.
- Application Software Update (ASU) is a set of enhancements for a specific functional area of EnterpriseOne applications. An ASU is distributed on CD and available on the Oracle xxx site.
- Service Pack (SP) is a group of all currently available fixes and in some cases, enhancements. The service pack is distributed on CD and available from the Oracle xxx site.
- Tools Release is a group of all fixes to JD Edwards EnterpriseOne foundation (System) code.

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

Using Customer Connection

Customer Connection is your link to customer support functions, the latest release information, and the Update Center. Select the Support link (left navigation bar) to view information about issues and Software Action Requests (SARs) that you have initiated. Link to the Update Center to research and download updates for the entire line of Oracle's JD Edwards EnterpriseOne products.

Using Update Documentation

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

For an ESU, the documentation is in the form of an HTML document (JJ12345.htm) packaged within the document or accessible from the Update Center before downloading. This document includes a list of SARs fixed by the update, the list of objects modified in the update and a section detailing special installation instructions to implement the fix. Each ASU and Service Pack distribution CD includes a cover letter in PDF format. Read the cover letter before installing the update.

The cover letter includes this information:

- An overview of the installation process.

- Information related to running the update application.
- Manual steps specific to the update (for example, processing option and application setup).
- Other Software Updates that must be applied before or after the Software Update from the CD.
- Any changes to Minimum Technical Requirements (MTRs) required by this update.

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

Implementing Software Updates

All JD Edwards updates follow this basic process flow:

- Prepare for the update.
- Acquire the update from the appropriate source.
- Install the update on the deployment server.
- Deploy the update to the Pristine and Development environments.
- Retrofit custom modifications and complete specific tasks relevant to the update.
- Validate the applied update in a safe environment.
- Rollout the update to production users.

CHAPTER 2

Preparing for a Software Update

This chapter provides overviews of the software update process, the impact analysis, considerations for custom software, and environment preparation for the update.

Understanding the Update Process

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

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

See Also

Chapter 5, "Using the Software Update Impact Analysis Tool," page 25

Performing an Impact Analysis

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

1. Perform a rough cut by reviewing SARs associated with the update. This review will help you determine if the update is relevant to your needs.
2. If you determine that an update is relevant, download and install it to your deployment server. Use the Impact Analysis tool to conduct a thorough review, or apply and run the update in the Pristine environment (PS812).

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

See Also

Chapter 5, "Using the Software Update Impact Analysis Tool," page 25

Knowing what an Update Preserves and Replaces

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

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

1. "Preserve" means that during an update you do not lose your custom modifications when the software you currently have installed automatically merges them with the new JD Edwards EnterpriseOne applications shipped with the update. If there is a direct conflict between your specifications and JD Edwards EnterpriseOne specifications, the update process uses your specifications. When there is no direct conflict between the two, the update process merges the two specifications.
2. "Replace" means the update replaces your modifications and does not merge them into the update. You will need to redo your custom modifications after the update completes.

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

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

Interactive Application Rules

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

The update process replaces the current application that resides in your Central Object database. Use Oracle's JD Edwards EnterpriseOne Visual Compare to restore custom changes. This tool preserves custom changes to:

- New hyperitems.
- New controls.
- New grid columns.
- Any style changes, such as fonts and colors.
- Any code-generator overrides.
- Data dictionary overrides.
- Location and size changes for controls.
- Sequence changes for tabs or columns.

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

Report Rules

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

An update preserves these changes:

- New reports.
- New objects to existing reports, including:
- Constants.
- Alpha variables.
- Numeric variables.
- Data variables.
- Runtime variables.
- Database variables.
- Dictionary variables.
- Any style changes, such as fonts and colors.
- Location and size changes for objects.
- Data dictionary overrides.

An update replaces custom sections on existing reports.

Application Text Changes

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

Table Specification Rules

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

An update preserves these changes:

- New tables
- New indexes

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

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

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

An update preserves custom indices over the custom tag files.

See *JD Edwards EnterpriseOne Tools 8.96 Development Tools: Tables and Business Views Guide*

Control Table Rules

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

An update preserves these changes:

- Data dictionary custom changes, such as changes to row, column, and glossary text. The update process uses your data dictionary as the base. If there is a conflict with JD Edwards EnterpriseOne data items, your changes override them.
- User-defined codes. The update process merges any new hard-coded JD Edwards EnterpriseOne values. (Values owned by JD Edwards EnterpriseOne are system 90 and higher, and H90 and higher.) The process also reports any JD Edwards EnterpriseOne hard-coded values that conflict with your custom values.
- Oracle's JD Edwards EnterpriseOne Workflow. The update process merges any JD Edwards EnterpriseOne additions, updates, or deleted workflow processes in your data. If there is a conflict with your workflow processes, JD Edwards EnterpriseOne overrides them.

Business View Rules

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

An update preserves these changes:

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

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

Rules for Event Rules

An upgrade preserves these changes:

- Custom event rules on a new custom control.
- For JD Edwards EnterpriseOne applications, reports, tables, and business function events that do not have any JD Edwards EnterpriseOne event rules attached to the same event.
- An upgrade replaces modifications you have made to JD Edwards EnterpriseOne applications, reports, tables and business function events that have existing rules attached.

Data Structure Rules

An update preserves all of these custom data structures:

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

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

- Forms

- Processing options
- Reports
- Business functions
- Generic text

Preparing Environments for Update

This section discusses how to:

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

Preparing the Prototype Environment

This table lists the requirements for preparing the prototype environment.

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

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

- Transfer all tested and approved modifications to the base prototype path code.
- After the transfer finishes, build a prototype package.
- Deploy the prototype package to workstations you want to run at the base release.
- Verify the Central Object Database is large enough to accommodate the update.

Preparing the Development Environment

This table lists the requirements to prepare the development environment.

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

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

- Make sure that all work in progress is checked into the development path code. From a development workstation, use the Promotion Manager or your own query or report to verify that objects are not checked out.
- Build the development package in preparation for deployment to one or more workstations.

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

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

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

See Also

JD Edwards EnterpriseOne Tools 8.96 Package Management Guide, "Understanding Objects"

JD Edwards EnterpriseOne Tools 8.96 Package Management Guide, "Building Packages"

Checking Modification and Merge Flags

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

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

Check modification and merge flags:

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

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

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

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

1. On Specification Merge Selection, complete these fields:

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

   Path Code Type the name of the associated path code (prototype or development).
2. On the QBE line, type *C* in the Mod Flag field to list the changed objects, then click Find.
3. For each object that appears in the grid, verify that the Mod Flag field is set to *C*, and the Mrg Opt field is set to *1* (merge), which ensures that the modifications are merged when the specification merges run during the update workbenches.

   Do not set the Mrg Opt field to *1* unless you want objects merged or saved.
4. When you finish reviewing or modifying the records, click Close.

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

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

Verifying Custom Changes in Master Control Tables

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

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

1. Verify that these master control tables for the data dictionary reside in a relational database accessed by the Data Dictionary data source:
   - F9200
   - F9202
   - F9203
   - F9207
   - F9210
   - F9211

- F9212
- F00165 (GT92002)

2. Verify that these master control tables for Solution Explorer tasks reside in a relational database accessed by the Control Tables - Production data source (for production) or Control Tables - CRP (for prototype environments) or Control Tables - Test (for the development environment):
   - F9000
   - F9001
   - F9002
   - F9005
   - F9005D
   - F9006
   - F9006D
   - F9020
   - F9022
   - F9050
3. Verify that these master control tables for user-defined codes reside in a relational database accessed by the Control Tables - Production data source (for production) or Control Tables - CRP (for prototype environments) or Control Tables - Test (for the development environment).
   - F0004
   - F0005
4. Verify that these master control tables for workflow reside in a relational database accessed by the Control Tables - Production data source (for production) or Control Tables - CRP (for prototype environments) or Control Tables - Test (for the development environment).
   - F98800
   - F98800D
   - F98800T
   - F98810
   - F98810D
   - F98811
   - F98830
   - F98840
   - F98845
5. Verify that the media objects queue paths are configured correctly.

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

Backing Up Servers and Databases

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

Preparing the Localization update

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

CHAPTER 3

Installing Updates on the Deployment Server

This chapter provides overviews of the deployment server installation process and discusses how to:

- Acquire an update.
- Use Oracle Electronic Product Delivery.
- Install the Software Update on the Deployment Server.

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

Understanding the Deployment Server Installation

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

The installation process for the deployment server includes these tasks:

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

Using Update Center to Acquire Updates

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

See Also

Chapter 4, "Using the Change Assistant," page 17

Using Oracle Electronic Product Delivery to Acquire Updates

If you already have JD Edwards EnterpriseOne 8.12 software and want the 8.12 SP1 update, go to the Oracle Electronic Product Delivery (EPD) website at http://edelivery.oracle.com, or contact your local Customer Care Center. EPD enables you to obtain your software electronically via Oracle's Electronic Delivery website. At this site, you will find instructions for use, available languages, access to download software, and a list of releases that are available for download.

Installing the Software Update on the Deployment Server

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

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

Install the software update on the deployment server:

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

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

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

1. Locate the downloaded JJnnnnn.exe file.
2. Double-click the JJnnnnnn.exe file. The Installation Setup Screen appears.
3. Click Next, the package size is calculated. The Installation Setup Type appears.
4. Click Finish.

To install ASUs from a CD:

1. Insert the setup CD into the CD drive.
2. Double-click the InstallManager.exe file. The Installation Setup Screen appears.
3. Click Next, and the package size is calculated. The Installation Setup Type appears.
4. Click Finish.

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

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

See Also

Chapter 4, “Using the Change Assistant,” page 17

CHAPTER 4

Using the Change Assistant

This chapter provides an overview of Oracle's JD Edwards EnterpriseOne and World Change Assistant and discusses how to:

- Set Up JD Edwards EnterpriseOne and World Change Assistant.
- Search for software packages.
- Work with packages.
- Work with batches.

Understanding the Change Assistant

The JD Edwards EnterpriseOne and World Change Assistant is a standalone windows application that helps you manage, download, and deploy JD Edwards EnterpriseOne packages. JD Edwards EnterpriseOne and World Change Assistant works in conjunction with the Environment Management Framework, and enables you to download and deploy individual or multiple software packages. You access JD Edwards EnterpriseOne and World Change Assistant from the Oracle Update Center. When you first launch the JD Edwards EnterpriseOne and World Change Assistant, a wizard helps you set up the necessary preferences. You can access and change these preferences at any time by selecting the Edit menu and clicking Preferences. JD Edwards EnterpriseOne and World Change Assistant maintains a history of all previous downloads and will only download changes to existing updates if those updates have been previously installed. JD Edwards EnterpriseOne and World Change Assistant will also alert you and automatically download any necessary prerequisites for the package that you are currently downloading.

PAR Files

JD Edwards EnterpriseOne and World Change Assistant is used to download and deploy both EXE packages and PAR packages. EXE packages are self-extracting files that deploy the contents based on the user input that is provided. PAR packages are files in Jar format that contain deployment components, a schedule of tasks to be performed, and documentation on these components and tasks. The built-in documentation and task schedule allow for better understanding of and control over the deployment process.

Folder Structure

Within JD Edwards EnterpriseOne and World Change Assistant, folders are displayed within a tree structure. These folders are used to organize your software package information. The tree structure consists of these folder nodes:

- News and Links
- View SAR Details
- Search for Packages

- Work with Packages
- Work with Batches

The News and Links folder node enables you to view content that is downloaded from the Update Center, such as breaking news, planner information, or minimal technical requirement (MTR) information.

The View SAR Details folder node provides details on a specific SAR that you enter.

Within the Search for Packages tree structure, you will find two folders named JD Edwards and My Queries. The JD Edwards directory contains predefined queries, which are grouped by pillar, release, and system code. This directory is updated whenever the JD Edwards EnterpriseOne and World Change Assistant is launched. The My Queries folder contains any customer-created queries for future use. These are persistent and do not get overwritten. You can configure the predefined queries with date ranges or other filters and save these searches in the My Queries folder or any subfolder therein.

Within the Work with Packages tree structure, you define the Downloads directory when setting up the JD Edwards EnterpriseOne and World Change Assistant. This is the root folder for packages that are downloaded from the Update Center. Typically, this is a folder that is shared by all your Update Center users to avoid downloading the same packages multiple times. Packages can be organized into additional folders under this parent folder.

You can also define the Log directory during setup. Sharing this folder allows all users to share the download and deployment tracking information. This folder also stores your queries and the information that is needed to resume a download in the event of a connection failure.

Viewing Package Details

When a package is selected in the Search results or Downloads grid, the bottom pane displays the Package Details window. You can close and display this window by selecting the Details option from the View menu. The Package Details window includes these tabs: Documentation, SARs, Objects, Objects by SAR, Net Change, Dependencies, Equivalents, Activity, and Notes.

Downloading Packages

Packages are downloaded from the Update Center from the Search results grid. The checked boxes in the first column of this form specify those updates that have not been downloaded. This status is determined by local information that is taken from the download log. Clicking the Download button starts the download of all checked items.

The Download To and Deploy option is available in the drop-down menu next to the Download button. This option provides a way to download and deploy all selected packages in one step. The drop-down menu also enables you to select the download folder from a list of previously chosen folders.

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

Deploying Packages

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

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

Working with Batches

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

Setting Up the Change Assistant

When you launch the application for the first time, a wizard walks you through setting up your preferences. You can update these preferences at any time from the Edit menu.

To set up JD Edwards EnterpriseOne and World Change Assistant:

1. Select the Edit menu, and click Preferences.
2. Select the Authentication tab.
3. Enter the update center access information:
   - User ID
   - Password
   - User name
   - Email
   - Phone
4. If you want to disable the Update Center connection, select the Disable Update Center Connection check box.

   You may want to disable the Update Center connection on machines that do not have connectivity to the Update Center or on low-speed connections where access to the Update Center is not needed.
5. If you want to always be prompted at startup for your preferences, select the Always Prompt at Startup? check box.
6. Select the Downloads tab.
7. Enter the Download Directory.
8. Select the Include Dependencies check box to automatically include dependent packages in download and deployment requests.
9. Select the Logs tab.
10. Enter a value in the Log Directory.
11. Select the Licensing tab.
12. Select the Always Accept check box to hide the license agreement during the download process.

    Selecting this box acknowledges your acceptance of the license agreement and hides the agreement during the download process.
13. Select the Advanced tab, and enter appropriate values.
14. If you access the Update Center through a proxy server that requires authentication, enter this information on the Advanced tab.

15. Specify the connection time-out value if desired.

Searching for Software Packages

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

- Perform a search.
- Run all queries.
- Save search criteria for future use.

Understanding Package Searches

Package searches can be performed in various ways. You can use preexisting queries to find packages, or you can create your own query and save it for future use. The preexisting queries are organized by package type under the JD Edwards folder. For example, queries for ESUs and Tools Releases are organized under the Electronic Software Updates and Tools Releases folders, respectively.

Queries in the JD Edwards folder are updated each time that you start the JD Edwards EnterpriseOne and World Change Assistant.

When you choose one of the predefined queries, the system populates the fields in the Search pane. You can update these fields as needed. If you decide to create your own query, you populate these fields manually.

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

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

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

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

Performing a Search

Access the JD Edwards EnterpriseOne and World Change Assistant.

1. Expand the Search for Packages node on the tree.
2. If you want to create a new query, use any of these fields on the Search pane to define your query:

Field	Value
Type	Specify the type of update you want to search for.
Release	Specify the release for the selected updated type.

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

3. If you want to use an Oracle JD Edwards predefined query, expand the JD Edwards folder to view a predefined set of queries and select a search.
4. Update the search criteria as needed to search by type, names, or dates.
5. Click the search button above the search criteria to run the search against the Update Center.
6. View the search results on the appropriate search tab on the right side of the screen.
7. View the package details below the search results by clicking the tab that corresponds to the information that you want to view.
8. To close a specific results tab, right-click it and select Close from the pop-up menu.
9. Select Close All Results to close all results tabs.

Running All Queries

To run all queries:

1. Select the folder for which you want to run the queries.
2. Right-click and select Run All Queries to run all the queries in the selected folder and subfolders.

   The JD Edwards EnterpriseOne and World Change Assistant application will display the combined results of all the included queries.

Saving Search Criteria for Future Use

To save search criteria for future use:

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

Working with Packages

This section discusses how to:

- Extract packages.
- Transfer packages with FTP.
- Delete packages.
- Deploy packages.

Extracting Packages

To extract packages:

1. Click the Extract button to display the contents of a package in a new extract window in a tree structure or in tabular form.
2. In the extract window, select one or more files or folders to be extracted by selecting the corresponding check box. Selecting a folder automatically selects all of its contents.
3. To examine a file before extracting it, right-click the tree or grid and select Open/Launch.

Transferring Packages with FTP

To transfer packages with FTP:

1. Click the FTP button to display a dialog box.
2. Enter the information for the machine to which the selected packages are to be transferred.
3. Transfer the packages.

Deleting Packages

To delete packages:

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

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

Deploying Packages

To deploy packages:

1. Select Deploy.
2. Select Run All to deploy all of the packages.
3. If multiple packages are selected, a new window is launched and the packages are deployed as an aggregate.
4. If a single package is selected and if the package is suitable for deployment, one of the following processes will occur, depending on the type of package that is selected:
   - If the package is a documentation package, the documentation link is displayed in a new documentation window, and clicking the link launches the associated application.

     If the link points to an HTML page that resides inside the package itself, it is directly displayed in the window.
   - If the package only contains some files that need to be extracted to the disk, the extract window is displayed.
   - If the package is a PAR file that contains some deployment tasks or is an EXE file, a new window is displayed that enables you to view the documentation for these tasks and run them.
   - If the package is an ESU, a new window is displayed prompting the user to select the target deployment environments and other deployment options.

Working with Batches

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

Understanding Batches

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

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

- Deploy

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

- Export

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

- Import

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

- New

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

- Delete

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

- Batch Summary

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

Working with Batch Details

To work with batch details:

1. Select Work with Batches in the tree structure.

   A list of batches will appear in the Batches pane.

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

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

3. To add a package to the batch, select Add Package.
4. To remove a package from the batch, select Remove Package.
5. To view more information about one of the packages, select the package to highlight it, and select Package Summary.
6. To view a history of actions that were performed on the batch, select the Batch Actions tab.

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

CHAPTER 5

Using the Software Update Impact Analysis Tool

This chapter provides an overview of the JD Edwards EnterpriseOne Software Update Analysis Tool and discusses how to work with the JD Edwards EnterpriseOne Software Update Impact Analysis Tool.

Understanding the Software Update Impact Analysis Tool

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

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

This is a list of features that this tool provides:

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

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

Working with the Software Update Impact Analysis Tool

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

- Access the JD Edwards EnterpriseOne Software Update Impact Analysis tool.
- Utilize the JD Edwards EnterpriseOne Software Update Impact Analysis tool.
- Configure a new analysis.

- Analyze your software update.
- Review the results in the Impact Analysis - Master view.
- Assign objects to users.
- Notifying users of assignments by email.
- View any prerequisites prior to installing a software update.
- View objects that will be affected by the software update.
- Accept assigned objects.
- View SARs.
- View control files in the Software Update.
- Work with the Scheduler view.
- Work with the Analyze report.

Forms Used with the Software Update Impact Analysis Tool

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

Accessing the Software Update Impact Analysis Tool

Access the JD Edwards EnterpriseOne Software Update Impact Analysis Tool:

1. Logon to a JD Edwards EnterpriseOne client with administrative privileges.
2. In the fast path enter GH9612.
3. From the Software Updates menu, right-click Software Update Impact Analysis → Prompt For → Values.
4. Enter the path to the location of the update.xml file (for example, \\deployment server name\E812\ImpactAnalysis). Since this utility can be run from a client or the deployment server, it is important that the XML files are located in a central location. By default, the XML files will be downloaded to the unc path provided in the previous example by the installation of a software update.
5. Click OK.

Utilizing the Software Update Impact Analysis Tool

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

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

Configuring a New Analysis

To configure a new analysis:

1. Click Add.
2. When creating a new report complete these fields:

Software Update Name	Click the browse button to search for the software update you wish to analyze. Select the desired software update. Click the Select button on the tool bar. This will populate the Software Update Name field in the setup screen.
Description	Enter additional details on this update in this field's text box.
Environment Name	Enter the environment to do the analysis on (for example, DV812).
Expected Completion Date	Enter the date you anticipate to complete the analysis.
Percent Complete	Enter the percent complete for this update.
Impact Analysis Status	Use the visual assist to select the status of the impact analysis (for example, 03 - In Process, 02 - Configure).

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

Analyzing your Software Update

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

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

Reviewing the Results in the Impact Analysis - Master View

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

The overall view of the analysis displays and includes:

- SARs.
- Objects and control files in SARs.
- What objects are affected / merged.

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

Assigning Objects to Users

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

1. To assign objects to users, select the Assign exit row.
2. Highlight the object you wish to assign and click the Select exit row.

   A check mark will appear to the left of the item you selected. Multiple records can be selected at once within this screen as well.
3. In the Assigned To text box, enter the address book number of the user who will receive the assignment.

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

Notifying Users of Assignments by Email

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

1. Select the Form exit.
2. Select one of these row options:

Approval Report	Shows the latest states of what users have done with objects.
Notify all	Sends a global email notification to all users that have been assigned objects (past and present).
Notify today's assigners	Sends an email notification to users who have been assigned today.

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

Viewing any Prerequisites prior to Installing a Software Update

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

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

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

   - Base line software updates that are required prior to installing the current software update.
   - Indicates any quarterly updates that already have the dependent / baseline software update.
   - Through the Install Status column, it will indicate if an update has been installed.
2. To exit this item, click the Close button to re-enter the SU Impact Analysis Master screen.

Viewing Objects Affected by the Software Update

Select the Object View row to display this screen.

Select one of these radio buttons to filter objects:

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

Accepting Assigned Objects

Complete this task to accept the assigned objects.

1. In the object window, accept a job by selecting it in the object window.
2. Click the Approved exit row.

   The administrator might modify these text fields:

Impact Analysis Status	Through a visual assist, various values may be assigned to indicate the status (for example Accept / Completion).
Percent Complete	A percent completed may be assigned to indicate the progress of analyzing the object.

3. Click the OK button to return to the Impact Analysis - Object View Screen.
4. Click the Close button to return to the main screen (SU Impact Analysis Master)

Viewing SARs

Complete this task to view relevant SARs.

1. Click the SAR View row.

   Select one of these options:

New SARs delivered	List new SARs available in the software update.
All SARs delivered	List all SARs in the software update.
View Objects associated with each SAR	Select this check box if you wish to view objects associated with a specific SAR.
Special Instructions exit row	List any additional details and special instructions that may be associated with a specific SAR.

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

Approved exit row	Same as noted earlier.

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

Viewing Control Files in the Software Update

Complete this task to view the Control Files.

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

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

   Select one of these exit row options:

Approved	Same as indicated earlier.
Detail	What specifically has changed within a control file.

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

Working with the Scheduler View

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

1. Click Scheduler View from the exit row.

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

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

Working with the Analyze Report

Click the Analyze Report exit row.

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

CHAPTER 6

Running Software Updates

This chapter provides an overview of the software update process and discusses how to run the JD Edwards EnterpriseOne Software Update program.

Understanding Software Updates

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

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

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

Depending on the update, you can use these workbenches:

- JD Edwards EnterpriseOne Table Conversion Workbench runs the table conversions that convert the technical and application tables to the new format. It then updates the Table Conversion Scheduler table (F98405) to reflect completion, and writes a conversion log record to the Table Conversion - History Log table (F984052).
- JD Edwards EnterpriseOne Control Table Workbench runs the batch applications for the planned merges that update the data dictionary (DD), user-defined codes (UDCs), menus, and workflow tables. It then updates the F98405 table to reflect completion, and writes a conversion log record to the F984052 Table Conversion History Log.
- JD Edwards EnterpriseOne Specification Table Merge Workbench runs the batch applications that update the specification tables. It then updates the F98405 table to reflect completion, and writes a conversion log record. The Object Librarian and Versions List merges are now a part of the specification merge.
- JD Edwards EnterpriseOne Package Workbench transfers the F9603 and F9631 Package Information tables from the Planner data source to the System - 812 data source. It then updates the Package Plan Detail table (F98404) to reflect completion.

Working with the Software Updates

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

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

Starting and Running the Software Updates

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

- Select environments and start the software.
- Restore a backup.

Selecting Environments and Starting the Software Update

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

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

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

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

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

- Select Into/Bulk Copy.
- Truncate Log on Checkpoint.

This table lists the requirements for starting the update workbenches:

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

To select the environment and start the update workbenches:

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

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

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

   The Work with Software Updates panel presents these row exits:

   - Select

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

   - Deselect

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

   - Update Detail

     Provides more information on the software update

   - Update Status

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

   - Update Sched Comp

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

   - Update Objects

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

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

   - Update Cntrl Table

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

   - Update Table Changes

     Displays table changes delivered with the software update.

   - Update Index Changes

     Displays index changes delivered with the software update.

   - Update History

     Shows the environment and plan history of the software update.

   - Advanced Setup

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

   - Update Delete

     Deletes the update package from the deployment server (planner\package\update name). Note that this does not delete the grid record corresponding to the software update.

- Update Uninstall

  Deletes all information for the selected ESU so that it can be reinstalled.

  Note. Because the Update Reinstall / Uninstall process deletes the ESU database, before beginning the update reinstall you must exit JD Edwards EnterpriseOne, then reenter before using this option, to ensure that all JD Edwards EnterpriseOne processes and connections to the database are closed.

2. Double-click the environments where you want the software update installed.
3. If you want the software update to run in unattended mode, verify that the Unattended Workbench check box is selected. Unattended Workbench is checked by default.
4. If you want to make a backup of specs, so that the original specs can be restored, select the Backup check box. Backup is selected by default.

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

   The Backup option creates a backup directory with the path planner\package\software update\pathcode.bak. Source, Include, and Data directories are created in this backup directory. The Source and Include directories include business function backups. The Data directory has a file backup.mdb that stores all spec backups in a relational database format. Control tables (data dictionary, UDC, and others) are not backed up.
5. Select the Coexistent check box if the software update is coexistent.

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

   - Select

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

   - Deselect

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

   - Restore Backup

     If backups were performed for a software update for a specific environment, this option restores all specs and business functions. Control tables are not backed up and hence will not be restored. For information about restoring a backup, see Restoring a Backup.

   - Delete Backup

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

- Affected Objects

  Use this exit to view:

Objects that will be installed.
SARs that will be installed to a specific path code.
Checked out objects.
Modified objects.
Objects with tokens.

- Advanced Setup

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

Restoring a Backup

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

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

To restore a backup:

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

1. Select the software update for which you want to restore the backup.
2. Click Next. The Software Update Environment Selection panel appears.
3. Select the environment for which you want to restore the backup.
4. On the Row Exit menu, click Restore Backup. The backup is restored.

   This may take several minutes.
5. Click Cancel to close the Software Update Environment Selection panel.

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

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

Completing the Update

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

- Run Table Conversions.
- Configure your control tables.
- Merge your specification tables.
- Restart the Specification Merge.
- Configure your packages.
- Validate the update.

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

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

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

Running Table Conversions

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

To run table conversions:

1. On Table Conversion Workbench, to determine how the table conversions will be run, click either of these options:
   - Synch - Synchronous mode. select this option to run one conversion after another. This is the default.
   - Asynch - Asynchronous mode. Do not select this option. It is for future use.
2. From the Form menu, select Convert All.

Note. To do one conversion at a time, select the appropriate detail records, and then select Convert Selected from the Form menu.

Note. While the conversions run, you can track their progress by selecting Table Conversion\Merge Log (P984052) from the System Installation Tools menu (GH961). The program shows a scrolling list of the conversions that have been processed.

Configuring your Control Tables

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

Complete this task to configure your control tables.

1. On Control Table Workbench, the system displays all control table merges in the detail area. From the Form menu, select Merge All.
2. After each merge finishes, verify the output of the report produced.

3. From Control Table Workbench, click Next.

Merging your Specification Tables

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

To merge your specification tables:

1. On Specification Table Merge Workbench, from the Form menu, select Merge All.
2. After the merge finishes, verify the output of the report that is produced.
3. After all merges complete, click Next.

   The Package Workbench form appears.

Restarting the Specification Merge

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

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

To restart the Specification Merge:

This table lists the requirements for restarting the specification merge.

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

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

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

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

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

   Package Name Enter the name of the software update.

   Source Environment Enter JDEPLAN (the Planner environment).

   Target Environment Enter the name of the environment you are updating.
2. Click Find. All objects that are part of the specification merge are displayed.
3. Select the object for which the specification merge failed. The object will have a status of 4 (Error) in the Merge Status column.

4. On the Row Exit menu, click Reset Merge Status. The Reset Merge Status panel appears.
5. In the New Merge Status field, specify *0* (zero, or Not Processed).
6. Click OK.

   The object's merge status is changed.
7. Click Close.

You can now restart the specification merge.

Configuring your Packages

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

Package Workbench transfers the F9603 and F9631 Package Information tables from the Planner data source to the System - 812 data source. It then updates the Package Plan Detail table (F98404) to reflect completion.

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

Task	Details
Personnel	Installer
Logon status	On the deployment server, logged on as user JDE with the database password for user JDE, in the deployment environment (DEP812).
Prerequisites	None
Concurrent Tasks	None

1. On Package Workbench, review your packages.
2. From the Form menu, select Configure. The Congratulations form appears.
3. Click Finish. The Software Updates History report will appear.

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

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

See Also

Chapter 6, "Running Software Updates," Restarting the Specification Merge, page 37

Reports in the *JD Edwards EnterpriseOne Application Release 8.12 Installation Guide*

Validating the Update

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

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

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

CHAPTER 7

Custom Modifications and Packages

This chapter provide overviews of custom modifications and packages and JD Edwards EnterpriseOne Visual Compare, and discusses how to:

- Retrofit custom modifications.
- Use JD Edwards EnterpriseOne Visual Event Rule (ER) Compare.
- Use JD Edwards EnterpriseOne Package Management.

Working with Custom Modifications and Packages

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

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

See Chapter 6, "Running Software Updates," Restoring a Backup, page 35.

Retrofitting Custom Modifications

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

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

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

This table lists the requirements to retrofit custom modifications.

Task	Details
Personnel	Programmer - preferably the same one who did the custom modifications.
Logon status	On the workstation on which you will retrofit object modifications, typically in the development or prototype environment.
Prerequisites	The environment has been updated and a package has been built and deployed to the desktop being used.
Concurrent Tasks	You can do nearly any other task at the same time.

To retrofit custom modifications:

1. From the workstation on which you will retrofit the object modifications, check out the modified objects.

   See *JD Edwards EnterpriseOne Tools 8.96 Object Management Workbench Guide*

2. Use Oracle's JD Edwards EnterpriseOne Visual ER Compare tool to compare the updated local specs with those saved in the backup that was created during the software update. If you did not create a backup, you can compare the updated local specs with central objects resident in a path code that has not yet been updated.

   The JD Edwards EnterpriseOne Visual ER Compare tool enables you to directly copy event rules from the original specifications to the upgraded specifications.

   See Chapter 7, "Custom Modifications and Packages," Using Visual Compare, page 42.

3. Use the other design tools described in the JD Edwards EnterpriseOne Development Tools Guide to retrofit other modified components of objects. For example, use FDA to retrofit control modifications in applications.
4. Use the Microsoft Windows utility WinDiff tool to display differences in business function source code.

   Before you can use Microsoft WinDiff, you must indicate the path to Microsoft WinDiff on the Environment tab in System Properties, which you can access from the Windows Control Panel. You can find help information about Microsoft WinDiff in the documentation provided with Visual C++.

   To build path codes to the source files for the business function on the source and target of the merge, select Differences from Work With Changed Objects. Microsoft WinDiff compares the files in the two locations.

5. Redo any custom event rules for Do Initialize events because they have been removed from the UBE event list.
6. When you finish testing and retrofitting the modifications, check them back in and rebuild the package.
7. Test and fix the modifications, then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

Using Visual Compare

This section provides an overview of Visual Compare and discusses how to:

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

- Use JD Edwards EnterpriseOne Visual Compare for applications and event rules.
- Build and test packages

See Also

JD Edwards EnterpriseOne Tools 8.96 Development Tools: Form Design Aid Guide, "Working with JD Edwards EnterpriseOne FDA Compare"

Understanding Visual Compare

JD Edwards EnterpriseOne provides three tools to help with the retrofit process: Visual Compare for Applications, Visual Compare for ER and Visual Compare for UDC Descriptions and Data Dictionary Glossary.

The JD Edwards EnterpriseOne Visual Compare tool enables you to compare two versions of JD Edwards EnterpriseOne objects (APPL, ER, NER UDC descriptions, DD glossary). For example, if you apply an update containing an application in which you made custom modifications you will need to retrofit that object. Visual Compare lets the developer compare the updated application or Named Event Rule to the custom object in the central objects data source of any defined path code, specifications, or ESU backup.

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

Using Visual Compare for UDC Descriptions and Glossary Tool

Oracle's JD Edwards EnterpriseOne Visual Compare for UDC Descriptions and Glossary tool enables you to review and apply text updates for Data Dictionary Glossaries and UDC. You can see a side-by-side comparison of the new and old text values, which enables you to choose whether to accept the changes. When you install an ESU containing UDC Description and Glossary changes, an XML file is extracted to the Special Instructions folder on the deployment server and is located in the following directory: ..\E812\SpecialInstructions. The Visual Compare for UDC Descriptions and Glossary Tool, application P96472, is run from an Administrative client workstation within JD Edwards EnterpriseOne and applies the changes to the current environment. You must have installed the Planner Update, which contains SAR 7481054, completed the special instructions, and built and deployed your package.

To apply DD glossary and UDC description changes:

1. In the Fast Path, type P96472.
2. On Work With Special Instructions, click Add.
3. On Search and Select Special Instructions, in the Server Share Path field, the path to the Deployment Server special instructions folder displays as the default.

   If you have moved the folder or if the appropriate folder does not display, click the browse button, navigate to the directory that contains the XML file, and select the directory. Click Find.
4. In the grid, click the appropriate ESU, and then click Select.

   The data from the new ESU is imported and the application returns to the Work With Special Instructions form. The new ESUs display in the grid. The Work With Special Instructions form displays. The ESUs display in the grid.
5. Select the appropriate ESU.
6. Select one of the following options from the Row Exit:

- Accept—Click this Row Exit if you want to accept all updates in the ESU without reviewing them.
- Reset Status—Click this Row Exit to change the status from Applied to Not Applied or from Reviewed to Not Applied.

  There are three types of statuses:

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

7. UDC Description Option—This Row Exit is enabled only if the ESU contains changes to UDC descriptions. Clicking this option launches the Work With UDC Description Changes form.

   The UDCs are grouped by product code, and display in a list underneath the Available UDC Items folder. Only those UDCs that have different descriptions than the ones that already reside in your current environment display. You can select individual UDCs, multiple UDCs, or all UDCs. To select all UDCs, click the top-level node located under the Available UDC Items folder. Clicking on any node selects all of the UDCs beneath it. To accept the UDC descriptions, click Accept.

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

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

   - DD Glossary—This Row Exit is enabled only if the ESU contains changes to DD glossaries. Clicking this option launches the Work With DD Glossary Changes form.

     The DD items are grouped by product code and display in a list underneath the Special Instructions folder. Only those DD items that have different glossaries than the ones that already reside in your current environment display. You can select individual DD items, multiple DD items, or all DD items. To select all DD items, click the top-level node located under the Special Instructions folder. Clicking on any node selects all of the DD items beneath it. To accept the DD glossaries, click Accept.

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

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

   - Preceding ESU— This option is a summary of changes previously applied but also contained in the selected ESU.
   - SARS Related— Displays all SARs in the selected ESU containing text changes for UDCs and Glossaries.

Using Visual Compare for Applications and ER

This section provides an overview of the JD Edwards EnterpriseOne Visual ER Compare interface and discusses how to:

- Launch JD Edwards EnterpriseOne Visual Compare for applications and ER.
- Work with JD Edwards EnterpriseOne Visual Compare.

Understanding the JD Edwards EnterpriseOne Visual Compare Interface

JD Edwards EnterpriseOne Visual Compare is a utility that lets you compare applications and ER on the local workstation to applications and ER in the central objects data source of any defined path code, specifications, or ESU backup. For example, if you make changes to and application or the ER for an application and then want to compare your changes to the application or ER in the server application, you would use Visual Compare.

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

When you launch JD Edwards EnterpriseOne Visual Compare, the Visual Compare form appears. A tree-structured menu of the application or ER appears on the left. The rest of the form displays a splitter window with the source application or ER (on the left) and the target application or ER (on the right). The target application or ER is your local application or ER.

In the window, the system uses fonts of different colors to display the rules that exist in both the source and target but are different and the rules that exist in one location but not the other. The system indicates a change in the parent node if one or more of its children have been changed. In the application or ER panes, the system highlights the lines that differ. If lines have been added to or deleted from one side, blank lines appear on the other. Disabled lines are indicated with an exclamation point. The system uses fonts of different colors to display the rules that have changed in content or that have been added or deleted. You can change the display colors by selecting User Options from the View menu, and then selecting Set Colors.

Visual Compare uses an algorithm to compare lines to determine if a change has occurred. If a certain percentage of the target line is different from the source line, then the system marks the line as being different. You can change the sensitivity of the comparison by selecting User Options from the View menu and then selecting Comparison Factors. To include disabled ER lines in the comparison, click Disable Partial Matching for Disabled ER. To change the percentage of difference required to highlight a line as being changed, enter a number in the Partial Match Ratio field. The default value of .50 means that a minimum of 50 percent of the target line must vary from the source line to trigger the system to mark it as being changed.

You can select a different source by selecting Open Source from the File menu.

Launching Visual Compare

Perform this task only to objects with attachable ER (applications, UBEs, tables, and NER business functions).

This table lists the requirements to launch the JD Edwards EnterpriseOne Visual ER Compare tool:

Task	Details
Labor Hours	Variable, depending on the number of custom modifications.
Computer Hours	Variable, depending on the number of custom modifications.
Personnel	Programmer - preferably the same one who did the custom modifications.

Task	Details
Logon status	On the workstation on which you will retrofit object modifications, typically in the development or prototype environment.
Prerequisites	The environment has been updated and a package has been built and deployed to the desktop being used.
Concurrent Tasks	You can do nearly any other task at the same time.

From Cross Application Development Tools (GH902), select Object Management Workbench (P98220).

To launch JD Edwards EnterpriseOne Visual Compare:

1. On Object Management Workbench, check out an object.
2. Select the object you checked out, and then click the Design button in the center column.
3. On the Design form, click the Design Tools tab.
4. Click ER Compareto view event rules, or click Start Form Design Aid to view applications.
5. On Select the Location of Source Specifications, perform one of these actions:
   - Click Select Path Code, and then enter the server location of the source object (the object to which you want to compare the local ER).
   - Click Advanced TAM, and then enter the TAM location of the source object (the object to which you want to compare the local ER). ESUs are delivered in a TAM package, so use this method to compare the local ER to an object packaged in an ESU.
   - Click ESU Backup. After applying a software update, this tool can be used to retrofit custom ER from the customized copy on the ESU backup.

Working with Visual Compare

Use the menu tree view to identify and display specific application and ER components that have changed. If a parent node is identified as being changed, expand it to see which of its children are different. Double-click an application or event in the menu to display its associated code. You can display more than one application or event at a time. Use the Tile option in the Window menu to view different items simultaneously.

To move from change to change, right-click in either the source or target pane and select Next ER Difference to move forward or Previous ER Difference to move backwards.

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

Note. If you want to copy all of the changes from the source to the target, you can use the AutoMerge feature, as described in Using AutoMerge section of the Software Update Guide.

Changing the Target ER

Perform any of these actions to change the target ER:

Task	Details
To copy selected lines from source to target	Select the lines to copy, right-click in the source pane, and then select Copy Right.
To delete selected lines from the target	Select the lines to delete, right-click in the target pane, and then select Delete.
To enable or disable selected lines in the target	Select the lines to enable or disable, right-click in the target pane, and then select Enable/Disable ER.

Note. Use the shift key to select multiple, contiguous lines and the control key to select multiple, noncontiguous lines.

After making changes, right-click and select Save ER. This action saves the changes to a buffer. When you open a new source or to exit JD Edwards EnterpriseOne Visual ER Compare, the system prompts you to save the changes again. If you elect to save the changes at this time, then the system updates the object on the workstation; otherwise, the changes will be lost.

Printing a Visual ER Compare Report

You can print a report comparing the source and target ER. You can show the comparison for a particular event or for all of the ER in the object.

To print a report for an event, double-click the event in the ER menu, right-click in either pane, and then select Print ER.

To print a report for the entire object, select Print ER from the File menu.

Using AutoMerge

Use AutoMerge when you want the system to change the target ER to include the source ER. You can use AutoMerge to change a particular event or to update all of the ER in the object.

Important! Before performing an AutoMerge for an entire object, do a comparison to be certain that you really want all of the changes that the system detects.

To use AutoMerge on an event, double-click the event in the ER menu, right-click in either pane, and then select AutoMerge.

To use AutoMerge on an entire object, select Advanced Operations from the View menu, and then select AutoMerge.

Building and Testing Packages

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

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

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

To include any modifications (changed or added business functions or applications) into a package for deployment to workstations (for example, DV812FB or DV812PB), you must define and build one of your own.

See Also

JD Edwards EnterpriseOne Tools 8.96 Package Management Guide, "Building Packages"

CHAPTER 8

Updating Environments

This chapter provides an overview of environment updates and discusses how to update the production environment.

Understanding How to Update the Production Environment

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

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

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

Oracle's JD Edwards EnterpriseOne Global Support Center maintains several documents that describe how to manage and promote Software Updates. These documents address many details of the update process and complement the current documentation. To access these documents, open a browser and enter the following URL:

http://www.peoplesoftcustomer.com

Log on to Oracle Customer Connection, and click Customer. In the left pane, perform a search for the following solution IDs. Click the link for the Solution ID and scroll to the bottom of the page to access the attached document.

Document	Solution ID
Best Practice for Managing Software Updates	200783413
Applying and Promoting Software Updates	200783414
Understanding and Managing Planner ESUs	200783415

Updating the Production Environment

This section discusses how to:

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

Updating the Production Environment Using OMW

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

The software update process creates an OMW project for this update. To update the production environment, promote the project in OMW to the appropriate status as defined by the activity rules. (For example, if you are using Oracle's default JD Edwards EnterpriseOne conventions, you can promote a project from Development to Prototype by changing the status from *21* to *26*. For more information about your organization's activity rules, see your JD Edwards EnterpriseOne administrator.)

See *JD Edwards EnterpriseOne Tools 8.96 System Administration Guide*, "Understanding JD Edwards EnterpriseOne OMW Administration".

Preparing to Use the Updated Production Environment

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

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

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

To prepare to use the updated production environment:

1. Create a new package.

   See *JD Edwards EnterpriseOne Tools 8.96 Package Management Guide*, "Building Packages".
2. Deploy the new production package to the workstation.
3. Surface test the updated production environment.

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

APPENDIX A

Setting Up Localizations

This appendix provides an overview of localizations and discusses how to:

- Add the localization.
- Change the revision level.
- Set processing options for R96450.

Understanding How to Set Up Localizations

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

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

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

Whenever you register an enhancement, change an enhancement's revision, or delete an enhancement, the Work With Enhancements application displays a warning message that it will run the R96450 to synchronize the Central Objects with the new enhancement level. The version of the R96450 run will update the DV812 Central Objects.

Adding the Localization

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

On the deployment server, sign on to the DEP812 environment.

In the fastpath, type *P96450*.

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

1. On Work with Enhancements, click Add.
2. On the Edit Enhancement Info screen, complete these fields:

Enhancement Type Type or select *ARGENTINA*.

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

3. Click OK.

   The program displays a warning message indicating that you are about to register a new enhancement.

4. Click OK.

   A UBE runs that automatically updates the country server NERs to reflect the new enhancement information. This UBE takes about a minute to complete.

   For more information about the R96450 UBE, see the R96450 section.

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

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

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

Changing the Revision Level

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

1. On the Work With Enhancements browse form, select the row for ARGENTINA.
2. Click Select.
3. Type new revision number in the Revision box and press OK.

   The program displays a warning message.

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

Setting Processing Options for R96450

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

The default processing options are:

Environment Name DV812

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

Enhancement Operation E

E indicates that the NER for localization will be enabled.

Generate NER <blank>

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

Level of Detail 0

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

Proof or Final 1

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

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

Glossary of JD Edwards EnterpriseOne Terms

activity	A scheduling entity in JD Edwards EnterpriseOne tools that represents a designated amount of time on a calendar.
activity rule	The criteria by which an object progresses from one given point to the next in a flow.
add mode	A condition of a form that enables users to input data.
Advanced Planning Agent (APAg)	A JD Edwards EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of rational databases, flat file format, and other data or message encoding, such as XML.
application server	A server in a local area network that contains applications shared by network clients.
as if processing	A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.
alternate currency	A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction. In JD Edwards EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.
as of processing	A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various JD Edwards EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.
back-to-back process	A process in JD Edwards EnterpriseOne Supply Management that contains the same keys that are used in another process.
batch processing	A process of transferring records from a third-party system to JD Edwards EnterpriseOne. In JD Edwards EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than JD Edwards EnterpriseOne to JD Edwards EnterpriseOne Accounts Receivable and JD Edwards EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to JD Edwards EnterpriseOne.
batch server	A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.
batch-of-one immediate	A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks. See also direct connect and store-and-forward.
business function	A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-JD Edwards EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules,

	and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.
business function event rule	See named event rule (NER).
business view	A means for selecting specific columns from one or more JD Edwards EnterpriseOne application tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.
central objects merge	A process that blends a customer's modifications to the objects in a current release with objects in a new release.
central server	A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical JD Edwards EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.
charts	Tables of information in JD Edwards EnterpriseOne that appear on forms in the software.
connector	Component-based interoperability model that enables third-party applications and JD Edwards EnterpriseOne to share logic and data. The JD Edwards EnterpriseOne connector architecture includes Java and COM connectors.
contra/clearing account	A general ledger account in JD Edwards EnterpriseOne Financial Management that is used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations in JD Edwards EnterpriseOne Financial Management.
Control Table Workbench	An application that, during the Installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.
control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
cost assignment	The process in JD Edwards EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.
cost component	In JD Edwards EnterpriseOne Manufacturing, an element of an item's cost (for example, material, labor, or overhead).
cross segment edit	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.
database server	A server in a local area network that maintains a database and performs searches for client computers.
Data Source Workbench	An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the system-release number data source. It also updates the Data Source Plan detail record to reflect completion.

date pattern A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.

denominated-in currency The company currency in which financial reports are based.

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

detail information Information that relates to individual lines in JD Edwards EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).

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

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

Do Not Translate (DNT) A type of data source that must exist on the iSeries because of BLOB restrictions.

dual pricing The process of providing prices for goods and services in two currencies.

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

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

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

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

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

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

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

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

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

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

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

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

facility An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. A facility is sometimes referred to as a "business unit."

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

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

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

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

header information Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.

interface table See Z table.

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

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

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

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

IServer service This internet server service resides on the web server and is used to speed up delivery of the Java class files from the database to the client.

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

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

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

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

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

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

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

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

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

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

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

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

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

master table See published table.

matching document A document associated with an original document to complete or change a transaction. For example, in JD Edwards EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.

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

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

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

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

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

nota fiscal In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.

nota fiscal factura In Brazil, a nota fiscal with invoice information.

See also *nota fiscal.*

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

Object Librarian A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of JD Edwards EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.

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

Open Data Access (ODA) An interoperability model that enables you to use SQL statements to extract JD Edwards EnterpriseOne data for summarization and report generation.

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

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

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

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

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

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

planning family A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.

preference profile The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.

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

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

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

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

production-grade file server A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.

program temporary fix (PTF) A representation of changes to JD Edwards EnterpriseOne software that your organization receives on magnetic tapes or disks.

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

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

11>21>26>28>38>01

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

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

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

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

pull replication One of the JD Edwards EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers using JD Edwards EnterpriseOne data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the F98DRPCN table.

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

real-time event A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when certain transactions occur.

refresh A function used to modify JD Edwards EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.

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

quote order In JD Edwards Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

	In JD Edwards Sales Order Management, item and price information for a customer who has not yet committed to a sales order.
selection	Found on JD Edwards EnterpriseOne menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
Server Workbench	An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the system-release number data source. It also updates the Server Plan detail record to reflect completion.
spot rate	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
Specification merge	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification	A complete description of a JD Edwards EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
Specification Table Merge Workbench	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
store-and-forward	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
subscriber table	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
supplemental data	Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs. For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across JD Edwards EnterpriseOne systems.
table access management (TAM)	The JD Edwards EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
Table Conversion Workbench	An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.
table conversion	An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.
table event rules	Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although JD Edwards EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.
terminal server	A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

three-tier processing The task of entering, reviewing and approving, and posting batches of transactions in JD Edwards EnterpriseOne.

three-way voucher match In JD Edwards Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.

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

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

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

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

two-way voucher match In JD Edwards Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.

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

variance In JD Edwards Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.

In JD Edwards EnterpriseOne Project Costing and JD Edwards EnterpriseOne Manufacturing, the difference between two methods of costing the same item (for example, the difference between the frozen standard cost and the current cost is an engineering variance). Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates.

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

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

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

wchar_t An internal type of a wide character. It is used for writing portable programs for international markets.

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

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

Windows terminal server A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows

terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

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

work day calendar In JD Edwards EnterpriseOne Manufacturing, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.

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

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

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

XML CallObject An interoperability capability that enables you to call business functions.

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

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

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

XML Transaction An interoperability capability that enables you to use a predefined transaction type to send information to or request information from JD Edwards EnterpriseOne. XML transaction uses interface table functionality.

XML Transaction Service (XTS) Transforms an XML document that is not in the JD Edwards EnterpriseOne format into an XML document that can be processed by JD Edwards EnterpriseOne. XTS then transforms the response back to the request originator XML format.

Z event A service that uses interface table functionality to capture JD Edwards EnterpriseOne transactions and provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested to be notified when certain transactions occur.

Z table A working table where non-JD Edwards EnterpriseOne information can be stored and then processed into JD Edwards EnterpriseOne. Z tables also can be used to retrieve JD Edwards EnterpriseOne data. Z tables are also known as interface tables.

Z transaction Third-party data that is properly formatted in interface tables for updating to the JD Edwards EnterpriseOne database.

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