ORACLE®

JD EDWARDS WORLD

JD Edwards World
Upgrade Guide

Version A9.1

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Phase One - Upgrade Process Overview

The following graphic is a high-level overview of the upgrade process:

Process Flow

Phase 1

```
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│   (A97JDE)        │

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│  └────┬─────┘     │
        │
│       ▼           │
   ┌──────────┐
│  │          │     │
   │Validator │
│  │          │     │
   └────┬─────┘
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        ▼
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   │  Start   │
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        ▼
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   └────┬─────┘
        │
        ▼
   ┌──────────┐
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   └────┬─────┘
        │
        ▼
   ┌──────────┐
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   │ (G97R4)  │
   └────┬─────┘
        │
        ▼
   ┌──────────┐
   │ Phase 6  │
   │ (G97R4)  │
   └──────────┘
```
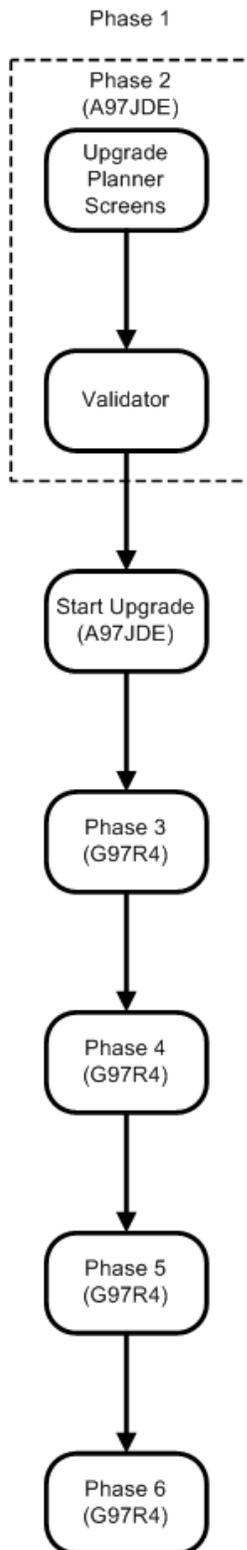
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Upgrade Methodology

JD Edwards World highly recommends that you always upgrade your software in an alternate (test) environment before you upgrade your production environment. This benefits you in the following ways:

- Allows users to test the new release of JD Edwards World software with copies of your data files. When you are satisfied with the new release, you can then upgrade your production environment.

- Users can be trained in the alternate environment while continuing your daily processing in the production environment.

- Modified or custom programs can be updated and tested in the alternate environment to verify they work with the new release of the software.

- Timings from file conversions in the alternate environment will help you plan for upgrading the production environment.

The procedures in this publication guide you through upgrading an alternate environment and then using the alternate to upgrade your production environment.

Alternate Environment Set up

The **only** libraries that will exist in the alternate environment before you start the A9.1 upgrade are copies of your production libraries. This includes data, control, and security files. You should restore the libraries from a backup tape. Until the A9.1 upgrade is complete, you will not be able to sign into the alternate environment.

Disk Space Considerations

It is recommended that you have enough disk space to restore a copy of your data libraries, space for a full A9.1 set of software, which is 5.7 gigabytes and another 10% of your data libraries combined size. For A9.1, most conversions are done as in place conversions, thus extra space is not needed for an additional copy of the file as in previous upgrades.

Duplicate Files Rule

The upgrade process does not allow duplicate files to exist in the customer data libraries defined in an upgrade plan (control, data, and security files). In preparation for the upgrade in the alternate environment, remove duplicate files from the appropriate library. You should retain the file that is first in a library list as that is the file that is being updated. The validation process of the upgrade will identify any remaining duplicate files and produce a report. Any duplicate files on the report will need to be cleaned up before initiating the upgrade.

Control File Dependencies

To avoid problems when you use or upgrade JD Edwards World software, make sure specific sets of control files and their associated logical files are together in the same library on your machine. For a list of the control files, see *Appendix A - Control File Dependencies.*

Monitor Changes to JD Edwards World Control Files

You will need to apply manual changes to the JD Edwards World control files (for example, data dictionary, menus, DREAM Writer, and so on) as part of the upgrade process. If you can follow one of the methods below, you will need to perform most of the changes only once. If not, you will need to apply all manual changes twice (to the alternate environment, and then to the production environment).

Dual Maintenance

Apply all changes made to the JD Edwards World production control files and to the alternate environment as well, synchronizing the files in both places.

> **Note:** If you use system 12 (Fixed Assets) or system 83 (FASTR) and plan to monitor the changes to DREAM Writer, you must use the dual maintenance method to monitor your changes and maintain your STAR and FASTR versions in both the production and alternate environments. When you upgrade your production environment in Phase Six, you need to copy these system files along with the DREAM Writer files. For more information, see the Important Note in the Updating your applications checklist item in Phase Six - Upgrade the Production Environment.

Control Changes

Do not allow users to change JD Edwards World production control files between the time you create the alternate environment and the time you upgrade the production environment.

Track Changes

Make note of all changes made to JD Edwards World production control files after you create the alternate environment, and then apply the same changes to the upgraded production environment.

You can use Data Base Audit Manager to track changes made to control files. For more information, refer to the *Data Base Audit Manager guide.*

Application/Technical Considerations

Run Integrity Reports

Run all standard integrity reports to ensure that all critical files are in balance before starting the upgrade.

Payroll – A7.3 Customer

For release A9.1, for customers upgrading from A7.3, the upgrade process moves all user-defined codes and data dictionary items associated with the previous Payroll system (06) to the Enhanced Payroll system (07). Review the customized User Defined Codes and Data Dictionary items as they will also be moved to system code 07.

Some A7.3 customers have an entry for User-defined Codes 07/BC, 07/SC, 07/WP, or 07/SG. These entries need to be deleted in order for the User-defined Code conversion for system 06 to system 07 to bring over the values correctly. If you have entries for User-defined Codes 07/BC, 07/SC, 07/WP, or 07/SG, you must delete them now. Use option 11 on menu G90 to view User Defined Codes.

Accounts Payable

The F04571, F04572, and F04573 files will be cleared in your data library as part of the upgrade process. If you have open payment groups, you need to use the Undo key to remove payments that cannot be completed before the upgrade.

Manufacturing – A7.3 Customers

Rate Schedules are not converted during the A9.1 upgrade. Rate Schedule files and programs changed significantly between A7.3 and A8.1/A9.1. Rate Schedules were replaced with Repetitive Schedules which use the same menu, G3115.

Prior to the upgrade, close all open Rate Schedules in A7.3. Open new Repetitive Schedules in A9.1.

See *Solution ID 200782881* on *Customer Connection*.

Contract Billing and Service Billing

All Invoice Generation and Journal Generation processes should be completed before starting the upgrade process. By completing these processes the F48910 and F48911 work files will be empty.

Sales Orders and Purchase Orders

Update *A738355623* is available to assist customers in identifying duplicate sales lines at an open status in the Sales Order (F4211) file. The duplicate sales lines must

be cleaned up before setting up the alternate environment or the F4211 file conversion will fail. The update also checks for duplicates in the F4301 file for customers who also use the localization file F76431.

Information regarding the update can be found on the JD Edwards World Upgrade Resources page on Customer Connection using the following link:

http://www.peoplesoft.com/corp/en/iou/upgrade/world_upgrd_resources_plan. jsp

EnterpriseOne (OneWorld) Files

Customers who previously installed EnterpriseOne, are likely to have EnterpriseOne formatted files in their environment. Those files have 'F' for format name instead of 'I' when doing DSPFD on the file. You must delete those files from your environment before setting up your alternate environment in Phase Two. Failure to delete the EnterpriseOne files affects the file conversion process of the upgrade. An update (*A738428634*) is available to assist you in determining if you have EnterpriseOne formatted files in your environment.

Information regarding the update can be found on the JD Edwards World Upgrade Resources page on Customer Connection using the following link:

http://www.peoplesoft.com/corp/en/iou/upgrade/world_upgrd_resources_plan. jsp

Database Audit Manager and Other Triggers

If you have used Database Audit Manager to attach triggers to files in your production environment, you must deactivate the triggers in your production environment (menu G946 option 7) before you save the copy of the production data libraries which you will restore in Phase Two to set up the alternate environment.

If you have triggers attached to other files, they must also be removed before saving the production libraries. To identify files with triggers attached, use the PRTTRGPGM command to produce a report. Use the RMVPFTRG command to remove triggers from the files.

Step 2 of the upgrade process will halt if triggers are attached to files and you will need to remove the triggers in the alternate environment before continuing with file conversion.

After the production data libraries are saved you can activate the Database Audit Manager triggers in the production environment again (menu G946 option 8). For other triggers you removed, use the results from the PRTTRGPGM report and then ADDPFTRG command or whatever method you use to add the triggers back to the production files.

IBM Journaling

IBM Journaling must be turned off before you start the A9.1 upgrade.

Phase Two – Planning and Upgrading the Alternate Environment

Overview

For this phase of the upgrade, first, restore a set of your data libraries, issue the LODRUN command or download the A9.1 software from Oracle's E-delivery site, and then set up an upgrade plan, which defines which data libraries will convert during the upgrade process and the libraries which will contain the new A9.1 software. After the upgrade plan is set up, initiate the upgrade command.

Restore Data Libraries to Alternate Environment

The first step in the upgrade process is to use a recent backup tape to restore your data libraries to another set of libraries. This includes libraries for data files, control files, and security files. Do not restore a copy of your production object, source or JDFDATA libraries as the A9.1 copy will be restored during the upgrade process.

> **Note:** Library names must not be more than 9 characters.

Next, clear the F98201, F98202, and F98203 database audit manager files in your alternate data library using the CLRPFM command.

Check for DDM Files

DDM files cannot exist in the data libraries you restored in the step above for the upgrade to work successfully. Use the WRKDDMF command to check for DDM files. If any exist, delete the files using the DLTF command.

Issue the LODRUN Command

> **Note:** Customers who are downloading the A9.1 software from Oracle's E-delivery site, must skip this step and continue with Create and Validate Upgrade Plan. Install Shield is used when downloading the software to perform the LODRUN command.

After you insert the A9.1 DVD on your iSeries machine, use the LODRUN command to install the upgrade planner library (JDFINS) and the installation library (JDEINSTAL). For information about the LODRUN command, see *Appendix B - LODRUN Command*.

1. Sign on as QSECOFR or a profile that has QSECOFR as the group profile (not JDEINSTAL).

    > **Note:** When you run the LODRUN command, the JDEINSTAL profile is created on your machine if it does not exist already.

2. From the command entry line, enter:
    LODRUN *device*
    where *device* is your DVD device name such as OPT01.

    The system sends messages showing the progress of the LODRUN process.

    If you have your system value for QFRCCVNRST set to a value of '1', you may receive an error during LODRUN. The error message states that the QCMDEXC object did not convert during restore. The resolution is to CHGSYSVAL SYSVAL(QFRCCVNRST) VALUE('0'). This will be temporary until STEP_1 is complete, then you may set the value back to a '1'.

    At the end of the LODRUN process, you will receive the following message:

    NOTIFICATION: Restore process complete. Please signon as JDEINSTAL.

Create and Validate Upgrade Plan

Sign on as JDEINSTAL to Access the Software Upgrade Menu

```
A97JDE                      JD Edwards World                      JDEWDS4
                           Software Upgrade Menu

       Plan The Upgrade                       Upgrade Utilities
    2. Work with Upgrade Planner          14. Print ASI Report
    3. Print Upgrade Validation Report
    4. Stop JDE Subsystems

       Upgrade The Software                  File Conversion Utilities
    7. Change Messages to Break Mode      20. Inquire on Conversion Status
    8. Start the Upgrade                  21. Conversion Status Report
                                          22. Conversion Schedule Report

       New Installations
  _11. World Express Install


  90. Signoff

Selection or command
===> _____
Enter    F3=Exit      F4=Prompt        F6=Messages        F9=Retrieve
F10=Command entry    F14=Submitted jobs   F18=Spooled Files   Help(Alt-F1)
```

Create Upgrade Plan

From the Software Upgrade Menu (A97JDE), select Work with Upgrade Planner. The Plan the Upgrade screen appears.

```
960099                        PLAN THE UPGRADE

ACTION CODE. . . I

PLAN NAME. . . . ZJDE_ALT
DESCRIPTION. . . ALTERNATE UPGRADE PLAN


      ENTER THE NAME OF A PLAN.


      YOU CAN CHOOSE ONE OF THE FOLLOWING OR COPY THEM
      TO CREATE YOUR OWN PLAN.  NOTE THAT "ZJDE" PLANS
      CANNOT BE CHANGED OR DELETED.

      WE RECOMMEND YOU REVIEW THE FOLLOWING:


                ZJDE     - SIMPLE PRODUCTION PLAN
                ZJDE_ALT - ALTERNATE UPGRADE PLAN

                ** PRESS F5 KEY TO ENTER UPGRADE DATA **


            F3=EXIT       F24=MORE KEYS
```

This screen is the first of a series of upgrade planner screens, all of which are described below. For more information on the upgrade planner screens – see *Appendix C – Upgrade Planner Screens.*

The Plan the Upgrade screen lets you begin to add or change an environment upgrade plan. JD Edwards World recommends that you use the ZJDE_ALT upgrade plan model to create your plan for the alternate environment.

1. From the Plan the Upgrade screen, inquire on ZJDE_ALT (an upgrade plan model supplied by JD Edwards World).

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

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

   > **Note:** Do not begin your plan name with ZJDE, numbers, or any special characters except underscore (__). Do not use a name for a plan that already exists as a library on your system. Your plan name cannot exceed nine (9) characters.

4. In the Description field, type a description for the new upgrade plan.

5. To add the new upgrade plan, press Enter.

6. Inquire on the new upgrade plan, and then press F5.

   The Libraries for This Plan screen appears.

```
 _96003                         Plan the Upgrade              Screen 1 OF 3
                              Libraries for this plan

  Plan Name. . . . . .  ZJDE_ALT    TEST (ALTERNATE) PLAN

  Specify all libraries for the  plan that contain J.D. Edwards
  files and programs.  Exclude IBM libraries such as QGPL and QTEMP.
  Specify current software release level and the release to upgrade to.
                      Current JDE Release Level. . . .  A73_____
                      New JDE Release Level. . . . . .  A91_____
                      Production LSF Library . . . . .  JDFOBJ____
                      Install Source Library . . . . .  1    (1=Yes, 0=No)
                      Install Object/Data Libraries. .  1

          Lib    Library           Library
          Typ     Name           Description
          COM    ALTCOM____   CLIENT'S ALT COMMON LIBRARY___
          DTA    ALTDTA____   CLIENT'S ALT DATA LIBRARY_____
          SEC    ALTSEC____   CLIENT'S ALT SECURITY LIBRARY_
          JDF    JDFDTAALT   JDE DATA LIBRARY   (ALTERNATE)
          OBJ    JDFOBJALT   JDE OBJECT LIBRARY (ALTERNATE)
          SRC    JDFSRCALT   JDE SOURCE LIBRARY (ALTERNATE)

        ......Enter=Update/Next Screen....F12=Previous Screen....F24=Move Keys....
```

Indicate the libraries for this plan

The Libraries for This Plan screen allows you to specify your current and new
JD Edwards World release levels, whether you want to install object and data only
or source only, and the libraries that define one environment. It is recommended
that you install source.

You can view source only first, set the Install Source Library value to '1' and the
Install Object/Data Libraries value to '0'. If you are installing source only, the plan
needs to have a JDF and OBJ type library that are populated. You can specify your
A7.3 or A8.1 libraries.

For the Production LSF Library line, fill in the name of your production object
library, which contains the F99LSF file. The information from the F99LSF file is
copied to the new A9.1 object library during the upgrade process.

> MULTI-PLANS: All plans must have the same Current and New
> JD Edwards World Release Level values. They also must have the same object,
> JD Edwards World data (JDFDATA), and source library names (library types
> OBJ, JDF, and SRC). If you need assistance setting up Multi-Plans, contact JD
> Edwards World Technical support for assistance.

If you make changes to this screen, press Enter. If one or more libraries you specify
on this screen do not exist on your machine, the Create Plan Library screen appears.
Verify the name of the library, or change it, and then press Enter to create it. The
JDF, OBJ, and SRC type libraries are always created for the alternate upgrade.

> **Note:** If the Coded Character Set ID (CCSID) for your system value QCCSID
> is set to 65535, and if the CCSIDs associated with your data dictionary and
> DREAM Writer files do not match each other, the following window
> appears.

```
96003X      REINSTALL LANGUAGE EXCEPTION

 PLAN NAME: ZJDE_ALT
 CODED CHARACTER SET (CCSID) MISMATCH

 DATA DICTIONARY FILE (F9201) CCSID . . : 00285
 DREAM WRITER FILE (F98301) CCSID . . . : 00037
 QCHRID SYSTEM VALUE CCSID. . . . . . . : 00037

 REINSTALL MUST USE CCSID OTHER THAN  65535.

 PLEASE ENTER CCSID VALUE TO USE. . . . : 00285

ENTER-CONTINUE  F3-EXIT  F12-PRV SCRN
```

Press Enter. The Merge Information screen appears.

```
96001E                         Plan the Upgrade              Screen 2 Of 3
                                Merge Information

Plan Name  . . . . .  ZJDE_ALT    TEST (ALTERNATE) PLAN

Specify Merge Modes And Library Names.

0=No Merge, 2=Final, 3=Replace                             Library Name
                    0/2/3
Data Dictionary Merge. . . . .  2  Data Dictionary. . . . . .  ALTCOM
Vocab. Overrides Merge . . . .  2  Vocabulary Overrides . . .  ALTCOM
Dream Writer Merge . . . . . .  2  Dream Writer . . . . . . .  ALTCOM
Menu Master Merge. . . . . . .  2  Menu Master. . . . . . . .  ALTCOM
User Defined Codes Merge . . .  2  User Defined Codes . . . .  ALTCOM
Generic Message/Rates Merge. .  2  Generic Message/Rates. . .  ALTDTA
Help Master Merge. . . . . . .  3  Help Master. . . . . . . .  ALTCOM
Software Repository Merge. . .  2  Software Repository. . . .  ALTCOM
Generic Text Keys Merge. . . .  2  Gen. Text Applic. Key Files ALTCOM
Auto Acct Instructions Merge .  2  Auto Acct Instructions . .  ALTDTA
Next Numbers Merge . . . . . .  2  Next Numbers . . . . . . .  ALTCOM


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

Indicate the merge information

The Merge Information screen allows you to specify modes in which you want the merges to run and the library locations of the control files. For more detailed information on the merges – see *Appendix C- Upgrade Planner Screens*.

> **Note:** JD Edwards World recommends that you do not change the merge modes. If the library locations are not correct, blank out the library name fields and press Enter. Your libraries will be searched and the correct locations will be retrieved.

MULTI-PLANS: If the plans share the same common files, you do not need to set the merge modes for the shared control files to run for the second and subsequent plans.

From this screen, you can access two screens that allow you to override printer file defaults and select advanced functions for the upgrade process. Review these screens to make sure your plans are correct.

▪ To access the Printer Information screen, press F5 (Printer Overrides).

▪ To access the Advanced Options screen, press F8 (Advanced Options).

Indicate the printer information

```
96001D                      PLAN THE UPGRADE
                            PRINTER INFORMATION

PLAN NAME. . . . . . ZJDE_ALT   ALTERNATE UPGRADE PLAN

THE FOLLOWING INFORMATION WILL BE USED TO DETERMINE HOW TO PRINT
THE REPORTS CREATED BY THE UPGRADE PROCESS.

                                   1/0   (1=YES, 0=NO)

OVERRIDE PRINT OPTIONS . . . . . . . .   0
OUTPUT QUEUE . . . . . . . . . . . . .   QPRINT

WIDTH OF FORM. . . . . . . . . . . . .   132
LENGTH OF YOUR FORM. . . . . . . . . .   68
OVERFLOW LINE. . . . . . . . . . . . .   62
CHARACTERS PER INCH. . . . . . . . . .   15
LINES PER INCH . . . . . . . . . . . .   8
FORM TYPE. . . . . . . . . . . . . . .   *STD
NUMBER OF COPIES . . . . . . . . . . .   1


        F12 OR ENTER=PREVIOUS SCREEN           F24=MORE KEYS
```

The Printer Information screen allows you to override the default values set for various printer attributes, such as form length, form type, and line spacing.

If you make changes to this screen, press Enter twice. Otherwise, press Enter once. The Merge Information screen reappears.

Select advanced options

```
96001A                      PLAN THE UPGRADE
                            ADVANCED OPTIONS

PLAN NAME. . . . . . ZJDE_ALT   ALTERNATE UPGRADE PLAN

THE FOLLOWING INFORMATION WILL BE USED TO DETERMINE THE JOBS THAT WILL RUN.

                                   1/0   (1=YES, 0=NO)

HOLD ON PRINT QUEUE. . . . . . . . . .   0

RUN CONTROL FILE CONVERSION. . . . . .   1
UPDATE DATA DICTIONARY GLOSSARY. . . .   1
USER DEFINED CODES DETAIL TEXT UPDATE.   1
DELETE OBSOLETE MENUS. . . . . . . . .   0


DOUBLE BYTE ENVIRONMENT. . . . . . . .   0
   CONVERT DATA TO UPPER CASE . . . . . 0  <-LIBRARIES JDFINS AND JDEINSTAL
                                            WILL BE CONVERTED IMMEDIATELY.
                                            COULD TAKE UP TO 20 MINUTES.

        F12 OR ENTER=PREVIOUS SCREEN           F24=MORE KEYS
```

The Advanced Options screen lets you select from several advanced upgrade functions, including enabling or disabling:

- Hold on print queue option
- Control file conversion
- Data dictionary glossary update
- User defined codes detail text update
- Obsolete menu deletion

> **Note:** The default value for Delete Obsolete Menus is 0. JD Edwards World recommends that you leave the value as 0 and then delete menus manually after you review the Obsolete Menus report which the system produces from the menu merge.

You can also indicate whether the environment you are upgrading is double byte, and whether you want to convert all display data to uppercase characters.

If you make changes to the screen, press Enter twice. Otherwise, press Enter once. Press Enter to move to the Data Dictionary Field Ownership screen.

Designate the Data Dictionary Field Ownership information

The Data Dictionary Field Ownership screen allows you to indicate fields in the Data Dictionary you want to automatically update with the Data Dictionary merge, which runs during the upgrade process. These are fields that customers may have chosen to modify for their business needs. Other fields that are not modified by customers such as system code are also updated by the Data Dictionary merge.

A 'J' in any field, indicates that the upgrade overrides the value in the customer's library for this field with the value from the JDF type library in your plan.

A 'C' in any field indicates that the upgrade does not replace the value for that field in the customer's library.

After the upgrade, you use the Data Dictionary Workbench to view and reconcile differences for fields with a value of 'C'.

```
96001F                       Plan the Upgrade              Screen 3 Of 3
                        Data Dictionary Field Ownership


Plan Name. . . . . . ZJDE_ALT    TEST (ALTERNATE) PLAN

Column Title - CH1, CH2, CH3 . . . . . . J
Row Description - DSCR . . . . . . . . . J
Default Values - DVAL. . . . . . . . . . J
Data Display Rules - DRUL. . . . . . . . J
Data Display Parameters - DR01 . . . . . J
Data Edit Rules - ERUL . . . . . . . . . J
Edit Rule Specifications  - ER01, ER02 . J
Justify - LR . . . . . . . . . . . . . . J




                  F12=Previous Screen    F24=Move Keys
```

If you do not have many custom Data Dictionary items, enter 'J' in all of the fields and later re-enter your custom Data Dictionary changes. The Data Dictionary merge produces reports and the Data Dictionary Workbench allows you to view the before and after value for all of the fields on the Data Dictionary Field Ownership screen.

Press Enter.

Validate your upgrade plan

The upgrade planner creates the Upgrade Planner Validation Report (R96004YR) when you select Print Upgrade Validation Report from the Software Upgrade Menu (A97JDE). The validation process also creates the Duplicate Files Found Report (R97281) if a processing option for the Upgrade Planner Validation Report is set to a '1'. The DD Field Ownership Report (R96004) prints as part of the validation process.

MULTI-PLANS: You must validate each plan.

Create the validation reports

1. Be sure you are signed on as JDEINSTAL.

2. From the Software Upgrade Menu (A97JDE), select Print Upgrade Validation Report. A Processing Options Revisions screen appears.

```
 98312                   Processing Options Revisions  Form ID. . . . .  P96004YR
                                                       Version. . . . .  ZJDE0001

 ZJDE - Upgrade Planner Validation Report              Display Level. .

 This job has various options described below. Enter the desired values and
 press Enter to continue.

 Enter Environment Name You Wish to            YOUR PLAN NAME
   Validate

 Enter 1-If this is a First Time Install       0
   or 0-if you are Upgrading

 Enter 1-to check for duplicate objects        1
   or 0-to bypass check

 Enter Upgrade Type - *INSTALL *REINSTALL      *REINSTALL
   *PTF or *ALT




                    F5=Printer Overrides
```

3. Enter the appropriate information in the processing option fields. Specify in the first field an upgrade plan name.

   Specify 0 in the second field and 1 in the third field, which indicates you want a report created that checks for duplicate files. Specify *REINSTALL in the fourth field.

4. After you verify your information, press Enter.

   The report submits to batch.

5. If you receive a message that one or more errors occurred, you have errors listed in the Upgrade Planner Validation Report (R96004YR) and/or duplicate files listed in the Duplicate Files Found Report (R97281).

The Upgrade Planner Validation Report

The report (R96004YR) identifies errors in the information you specified in your upgrade plan. It lists the plan information as you entered it and prints error

codes to the right of the incorrect information. A total number of errors are given at the end of the plan information. The error codes that appear on the report are fully described at the end of it, including error descriptions, cause statements, and instructions about resolving the errors. The report must have an error count of zero before you can begin the upgrade process.

```
96004YR                                                                          Page - . . .    1
                                       Upgrade Planner Validation Report          Date - . . .  2/05/97

   Plan        User
   Name        ID
 ----------  ----------
 JORGE1      JDEINSTAL                        Plan Name                         E R R O R   C O D E S
                                         ----------------                      --------------------
                                         Install object & data

 Plan Libraries                          Current JDE Release Level. . . . . . . A62
 -----------------------                 New JDE Release Level. . . . . . . . . A81

                                         Install Source Library . . . . . . . . 1
                                         Install Object/Data Libraries. . . . . 1

                        Type      Library Name      Library Description
                        ----      ------------      ------------------
                        JDF       JMFDATA           JM DATA LIBRARY             3102,
                        OBJ       JMFOBJ            JM OBJECT LIBRARY           3102,
                        SEC       JMFSEC            JM SECURITY LIBRARY         3102,
                        SRC       JMFSRC            JM SOURCE LIBRARY           3102,
                        COM       JMSCOM            JM TEST COMMON LIBRARY      3102,
                        DTA       JMSDTA            JM TEST DATA                3102,

 Systems to Upgrade       O       Ins
 -----------------        P       Sys             System Description
                          -       ---             ------------------
                          1       00              TECHNICAL FOUNDATION        3115,
                          1       01              ADDRESS BOOK                3115,
                          1       02              ELECTRONIC MAIL             3115,

                     .                        .                                .
                     .                        .                                .
                     .                        .                                .
                     .                        .                                .
 (Total Errors = 009)

            3102                     Cause........ERROR: This Library does not exist on your computer.

                                     Resolution...Using the IBM CRTLIB command, create the library.

                                              CRTLIB LIB(xxxxxxxxx) TYPE(*PROD) TEXT(xxxxxxxxxx)

                                              LIB = Library name (maximum of 9 characters)

                                              TYPE = *PROD  or  *TEST

                                              TEXT = maximum of 50 characters

                                                      - OR -

                                         Specify an existing library or file name.

            3106                     Cause........ERROR: IBM security or authorization problems exist.

                                     Resolution...Change IBM security or authority using the IBM EDTOBJAUT command.
                     .                        .                                .
                     .                        .                                .
                     .                        .                                .
                     .                        .                                .
```

The Duplicate Files Found Report

The report (R97281) identifies any duplicate files in the environment you ran the report against. This report will be created when you create the Upgrade Planner Validation Report. If you set the processing option for the Upgrade Planner Validation Report to check for duplicate files, the report will list the file and the library in which the duplicate was found for each duplicate file, or it will indicate "NO DUPLICATE FILES FOUND." You must remove duplicate files from the environment before you perform the upgrade. Normally, customers keep the file that is first in the library list for their environment.

```
97281                              J.D Edwards & Company                    Page -          1
                                Duplicate Files Found Report                Date -     2/05/97
                                  Plan Name . . . JORGE1                     Time -    14:32:14


Object      Object      Object
Name        Library     Type      Description
F0092       ALTCOM      *FILE     Library Lists - User
F0092       ALTDTA      *FILE     Library Lists - User

F0092LA     ALTCOM      *FILE     LF - Multi Format by Library L
F0092LA     ALTDTA      *FILE     LF - Multi Format by Library L

F0092LB     ALTCOM      *FILE     LF - Group/User
F0092LB     ALTDTA      *FILE     LF - Group/User

F0092LC     ALTCOM      *FILE     LF - Multi Format by Security
F0092LC     ALTDTA      *FILE     LF - Multi Format by Security

F0092LD     ALTCOM      *FILE     LF - Department
F0092LD     ALTDTA      *FILE     LF - Department

F0101       ALTCOM      *FILE     Address Book Master
F0101       ALTDTA      *FILE     Address Book Master

F0411       ALTCOM      *FILE     Accounts Payable Ledger
F0411       ALTDTA      *FILE     Accounts Payable Ledger

F0411LA     ALTCOM      *FILE     LF - Address No, Doc Ty/No/Co,
F0411LA     ALTDTA      *FILE     LF - Address No, Doc Ty/No/Co,

F0411LB     ALTCOM      *FILE     LF - Address No,Check No,Bank,
F0411LB     ALTDTA      *FILE     LF - Address No,Check No,Bank,

F0411LC     ALTCOM      *FILE     LF - Address No, G/L Date(##YY
F0411LC     ALTDTA      *FILE     LF - Address No, G/L Date(##YY
```

The DD Field Ownership Report

The report (R96004) prints the values you filled in on the DD Field Ownership screen for your plan.

Start the Upgrade and Track Progress

Change Messages to Break Mode

From the Software Upgrade Menu (A97JDE), select Change Messages to Break Mode. This changes the QSYSOPR message queue to break mode.

Start the Upgrade

1. From the Software Upgrade Menu (A97JDE), select Start the Upgrade.

```
                    JDE Upgrade Command (JDEUPGRADE)

        Type choices, press Enter.

        Upgrade Type . . . . . . . . . .    _____        *PTF, *INSTALL, *REINSTALL...
        Upgrade Plan Name  . . . . . . .    _____      From Upgrade Planner
                      + for more values     _____
        Source Media . . . . . . . . . .    _____      Device Name, *SAVF, *DISK
        Current JDE Release Level  . . .    _____      From Upgrade Planner
        New JDE Release Level  . . . . .    _____      From Upgrade Planner
        Run Validator Program  . . . . .    1               1=Yes, 0=No




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

2. In the Upgrade Type field, enter *REINSTALL.

3. In the Plan Name field, type the name of the upgrade plan that defines the environment you want to upgrade.

MULTI-PLANS: If you are upgrading more than one environment (multiple plans), enter a plus character (+) in the second Plan Name field, press Enter and then enter the additional plans in the fields provided.

4. In the Source Media field, type your DVD device name or *SAVF if you downloaded the software from Oracle's E-delivery site.

5. In the Current JDE Release Level field, type the current JD Edwards World software release level of the environment you want to upgrade (only A73 and A81 are valid values).

This release level must match the current JD Edwards World release level specified in the upgrade plan.

6. In the New JDE Release Level field, type A91 and press Enter.

This release level must match the new JD Edwards World release level specified in the upgrade plan.

7. Leave the default values in the remaining fields.

8. Press Enter.

> **Note:** During the Start the Upgrade process, the JDE and JDEPROD profiles are enabled and the passwords reset to JDE and JDEPROD. Also, the job description is changed. If you are a coexistent customer, this affects your EnterpriseOne set up.

Track the Progress of the Upgrade

Note: Shortly after you press Enter on the JD Edwards World Upgrade Command (JDEUPGRADE) screen, the IBM Display Messages screen appears and asks you whether the DVD is loaded. Respond to this message. If you used *SAVF on the Upgrade Command, the software restores from save files and no message is issued.

The first part of the upgrade process (UPG_STEP1) restores the software from the DVD or save files and sends you messages as it restores each library.

The second part of the upgrade process (UPG_STEP2) submits merges and converts files. These jobs run in the JDEINSTAL subsystem in separate job queues. After you receive the message "You may now sign on using your JD Edwards World User Profile to continue" (approximately halfway through UPG_STEP2), you can sign on and begin Phase Three.

Note: Step 2 will change the JDE user profile job description library list to the libraries in the plan that just ran.

Note: Step 2 will halt if there are trigger programs attached to files in your alternate environment data libraries. A query report is produced listing the files with triggers attached. Use the RMVPFTRG command to remove the triggers. You may restart the Upgrade by typing *ALT for the Upgrade Type and *DISK for Source Media on the Start the Upgrade command.

After UPG_STEP2 completes, the upgrade process submits the following job automatically:

▪ Rebuild field reference files (FRFs) and the JD Edwards World message file (J98FRFGEN)

MULTI-PLANS: UPG_STEP1 builds work files for all plans before it begins the restore process. UPG_STEP2 performs file conversions and merges for the first environment. An ALT_STEP2 job performs file conversions and merges for each subsequent plan.

You will not receive the message. "You may now sign on using your JD Edwards World User Profile to continue," until the last ALT_STEP2 runs.

Note: The upgrade process produces job logs (QPJOBLOG) for UPG_STEP1 and UPG_STEP2. Keep job log files (QPJOBLOG) in an output queue where they will not be deleted. They are extremely useful for resolving upgrade issues.

The UPG_STEP1 job log shows what happened during the DVD or Save File restore portion of the upgrade process. The UPG_STEP2 job logs (and ALT_STEP2 if upgrading multiple environments) show what happened during file conversions and merges.

Inquire on File Conversion Status

After UPG_STEP2 completes, check for file conversions that completed abnormally and resolve any problems. For detailed information on the File Conversion process, see *Appendix D – File Conversions.*

MULTI-PLANS: You must inquire on file conversion status for each plan. Specify each plan name and the associated library name. Do not check file conversion status for an upgrade plan until the associated STEP2 job has finished. The message STEP 2 Completed for Plan name appears for each plan.

1. From the Software Upgrade Menu (A97JDE), select Inquire on File Conversion Status.

```
972613                    File Conversion Status

Plan Name. . . .  _____
Library Name . .  _____
Conversion Sts .  __

Skip to File . .  _____

Op    Object    Library   File Conversion Cvt Cvt     User    Run
Op     Name      Name     Type    Type    Fil Sts      ID     Date

         Opt: 1=Display Joblog  8=Print Joblog    F3=Exit  F24=More
```

2. In the Plan Name field, type the name of the upgrade plan for which you want to check file conversion status.

3. In the Library Name field, type the name of your common library.

4. In the Conversion Sts field, enter CA (Completed Abnormally).

5. To display the job log for a file conversion listed on this screen, in the OP (Option) field next to a file conversion job, enter 1 (Display the job log).

6. Repeat steps 3 through 5 for your data and security libraries.

7. Note any files that failed conversion and resolve any problems before you continue with the upgrade. For assistance, call JD Edwards World Technical Support. If you need to run single file conversion programs, first you need to perform the following two steps (as noted in *Phase Three*):

   ▪ Change the QJDF Data Area in JDFOBJALT.

   ▪ Sign On as a User Who Accesses the Alternate Environment you want to update.

> **Note:** If for any reason you must start the upgrade process again because file conversion status showed significant errors, call JD Edwards World Technical Support for assistance.

Go to the Next Phase

Phase Three – Create New Files and Update Applications

Overview

This phase shows what you must do to activate installed systems, create new files, update some of your JD Edwards World control files, and run the menu comparison report.

> **Note:** You can begin this phase when you receive the following message: You may now sign on using your JD Edwards World User Profile to continue.

MULTI-PLANS: In this phase, you may need to perform the procedures more than once.

Change the QJDF Data Area in JDFOBJALT

Use the CHGDTAARA command to change the QJDF in your alternate object library starting at position 181 to the name of the alternate library, which has your security files such as F0092.

CHGDTAARA DTAARA(JDFOBJALT/QJDF (181 10)) VALUE('*XXXX*')
where *XXXX* is the name of your alternate library containing your security files.

> **Note:** With A9.1, there is no Software Protection Code. If you wish to use Software License Manager in Audit Mode, you will only be able to do that when you are live on A9.1 and have no other environments using Software License Manager on your machine.

Sign on as a User who Accesses the Environment Library you want to Update

You need to either create a new user profile or change an existing user profile to access the alternate environment or partially upgraded environment (GO LIVE process). For detailed information use *Appendix E – Create or Modify a User Profile.*

> **Note:** If you are upgrading from a release prior to A73 CU 15 or A8.1 CU 6, duplicate the F00944 file with no data from the JDF type library in your plan to your library containing the F0092 file.

Update Install History

The Install History (Type 97 on command line) in the new object library for A9.1 will only contain a record for the upgrade you just completed. You can copy in the install history records from your production object library so that when you GO LIVE on A9.1, you will have a complete install history. Use the following command to update the install history in A9.1:

CPYF FROMFILE(*PRODOBJ/*T97300) TOFILE(*JDFOBJALT/*T97300) MBROPT(*ADD)

where *PRODOBJ* is your production object library and *JDFOBJALT* is the name of your A9.1 object library.

Activate Installed Systems

From any JD Edwards World menu, enter G97R42.

From the Upgrade Utilities menu, take selection 7. Place a '1' in the OP field next to any application system, you will start using with the A9.1 release. Place a '2' in the OP field next to any application system you will no longer use. Before activating new application systems, check your contract to ensure that you are licensed to that application. Additional information can be found in the help for this program.

```
 99LSFA                      Activate Installed Systems

 O   Prod
 P   Code   Description_____   Status_____
 _          DSI WorldRF
 _          Technical Foundation
 _          Address Book
 _          Electronic Mail
 _          Accounts Receivable
 _          Enhanced Accounts Receivable
 _          Accounts Payable
 _          Payroll/HR Base & Time Entry
 _          Enhanced Payroll
 _          Human Resources
 _          General Accounting
 _          Financial Reporting
 _          Multi-site consolidations
 _          Foreign Currency/Cash Basis
 _          Cash Basis
 _          Fixed Assets
 _          Equipment/Plant Management

   Opt: 1=Activate System   2=Deactivate System
```

Create New Files

Build New Files List Report

From the Post Upgrade Menu (G97R4), select Build New Files List.

```
 G97R4                         PeopleSoft World                      JDEWDS3
 Setup Operation          _____
                                Post Upgrade Menu

... UPDATE APPLICATIONS              ... CREATE FILES/RUN JOBS
 2.  Print Upgrade Reports           14.  Build New Files List
 3.  Control File Updates            15.  Create New Files
 4.  Create ASI Report               16.  Rebuild Menu Word Search
 5.  Print ASIs                      17.  Run Special Application Jobs
 6.  Work With Instructions(ASIs)
 7.  DREAM Writer Review Workbench   ... REVIEW REPORTS/STARTUP
                                     23.  Utilities
                                     24.  Start JDE Subsystems


 Selection or command
 ===> _____
    _____
 Thu, Oct 19, 2006              A91 GSC Testing                  DK5976993
   1:33:11pm               Copyright © 2006, Oracle.             QPADEV002D
```

1. Enter the name of the upgrade plan for the environment in which you want to create the new files.

    The report job is sent to batch for processing.

2. When the job finishes, print the New Files List Report (R97452).

    > **Note:** Do not proceed to Create New Files until this job finishes.

Create New Files

In this step, you will create new files in your common library, and then the rest of the new files in your production library or libraries. If you have your files split into multiple libraries, such as payroll files in a separate library, you need to do this process several times making sure to create the files in the correct library.

> **Note:** New files for A9.1 which have a Y in the Optional field in Software Versions Repository are not created during this process.

1. From the Post Upgrade Menu (G97R4), select Create New Files.

```
  97453                      Create New Files in Environ.

  Plan Name. . . . . . . . _____
  Enter System Code. . . . ____
  Com/Prod/*ALL. (C/P/*) _           FROM Library. . . .
  Create In Library. . . _____   SOURCE Library. . .
                                      File ID . . . . . . _____
  Opt File Name  Ty  Com  Data  Description_____
   _
   _
   _
   _
   _
   _
   _
   _
   _
   _
   _
   _


  Opt:1-Use Source 2-Crtdup wo/data 3-Crtdup w/data F4-Detail F5-JDE Defaults
```

2. Type the name of the upgrade plan in the Plan Name field for the environment in which you want to create the new files.

3. Type C to show all the common files (in the Com/Prod/*ALL field).

   Note: If you do not have a common library, type an asterisk (*) instead of C or P in the Com/Prod/*ALL field on the screen shown below.

4. Enter the name of the common library (in the Create In Library field) in which you want the files created. This library must be defined in the upgrade plan.

5. After you verify your selections, press Enter.

   Your screen lists the files that JD Edwards World recommends you create in your common library.

```
  97453                      Create New Files in Environ.

  Plan Name. . . . . . . . PROD1_____   PROD1 Testing Environment
  Enter System Code. . . . ____
  Com/Prod/*ALL. (C/P/*) C           FROM Library. . . . JDFDTAALT
  Create In Library. . . ALTCOM_____   SOURCE Library. . . JDFSRCALT
                                      File ID . . . . . . _____
  Opt File Name  Ty  Com  Data  Description_____
   _  F9801JA    LF   Y    N    JF - Member ID (F9801 F9802)
   _
   _
   _
   _
   _
   _
   _
   _
   _

  Opt:1-Use Source 2-Crtdup wo/data 3-Crtdup w/data F4-Detail F5-JDE Defaults
```

6. To select JD Edwards World default options for the Opt (Option) field to the left of each listed file, press F5 (JD Edwards World Defaults).

7. To create the new files, press Enter.

8. Repeat the steps in this checklist item, but specify the following values:

- In the Com/Prod/*ALL field, specify P to show all the production data files.

- In the Create In Library field, specify the name of the production library in which you want the files created.

9. Repeat the tasks to Build New Files List Report and Create New Files until the New Files List Report is empty.

> **Note:** F00UDPW will be created in the Common library. The file needs to be in the same library as your World Writer files so use MOVOBJ if needed to move the file from the Common library to your Data library.

> **Note:** If QEBB shows on your list of files to create, use the CRTDUPOBJ command to duplicate it from the JDF type library in your plan to your data library.

> **Note:** If any logical file fails to create because of duplicate records, view the Duplicate Cleanup jobs on menu G97U63 (upgrading from A73) or G97U61 (upgrading from A81) before manually cleaning up duplicate records and then creating the logical using the CRTDUPOBJ command. If you use the special jobs on G97U63 or G97U61, you must delete the logical before running the special job, as the logical was created with no members during the create new files build.

Optional Files

Some new files for A9.1 were not created during the create new files process as they are marked as Optional File in Software Versions Repository (2/G92). The files that are optional are listed in User Defined Code 97NF. Use option 4 (User Defined Codes) on menu G97R6 to inquire on UDC 97NF. F21 from the User Defined Codes screen takes you to DREAM Writer P0005P versions list. Copy the XJDE0001 version and change Data Selection to be Product Code EQ 97 and User Defined Codes EQ NF. Execute the DREAM Writer and a report (R0005P) is generated. In the Description field on the report is a short explanation of when the file is needed. If you determine you need the file, you can use the CRTDUPOBJ command to duplicate the file from the JDF type library in your plan to your data library. Not all of the values in UDC 97NF are new for A9.1 so you may already have some of the files in your alternate data library from previous upgrades. Use the WRKOBJ command to determine if the file already exists in your data library.

Print Menu, User Defined Code, and New Automatic Accounting Instruction (AAI) Report

From the Post Upgrade Menu (G97R4), select Print Upgrade Reports.

The Work with Spooled Files (WRKSPLF) screen appears.

1. In the User field, enter JDEINSTAL.

2. Print the following reports if they have not been printed already.

R97883A	Menu Merge Exceptions Report
R987241	User Defined Code Merge Report or view online
R98727	New Automatic Accounting Instructions (AAI) Report

Update the Menus Files

You can update the menus by either replacing them or changing selections in them individually. Use the Menu Merge Exceptions Report (R97883A) to determine the changes to make.

How to use the Menu Exceptions Report

Review the Message column on the report. Possible messages are:

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

Program may be obsolete. Indicates that the program shown in the Job to Execute column on the report is obsolete and the merge did not find a program to replace it. The merge attaches a menu message warning to menu selections that access the obsolete programs. You should remove these programs from the menus unless the programs exist in a custom library.

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

Cannot add sel to menu. Indicates that the merge unsuccessfully attempted to add a selection because no selection spaces were available on the menu. Use option 6 on menu G97R6 to copy the menu from the JDF Type library in your plan to the library containing the menu files.

Opt key/vers not found. Indicates that the merge did not find a form ID or version in the DREAM Writer files. Ignore those that have *NONE in the Option Key field.

```
97883A                                    J.D. Edwards & Company                         Page -       1
                                          Menu Merge Exceptions                          Date -  2/05/97
   FROM Library -    JDFDTAALT                                                            Mode - Replace
   TO Library   -    ALTCOM

   Menu Id     Menu Title            S1      Selection               Job to    Option Key  Version      Message
                                     No      Description             Execute
   ---------   ----------------- ----- ------------------------ ----------- ----------- ----------- ---------------------
   G08E3       Employee Advanced/Technical Op 03  Purge Employee Job File    J0601182    P0601182                 New pgm for release
                                     14  Compa-Ratio Calculation  J082501     P082501                  New pgm for release
   G08E43      International Information Setu 07  Division Codes    J0006A      P0006A                   New pgm for release
                                     14  Canadian EE Setup         P08021                               New pgm for release
   G08H1       Employee History      04  Employee Multiple Job History J060119  P060119     ZJDE0001    New pgm for release
   G08J1       Job Specifications    16  Pay Ranges by Job        J082450     P082450                  New pgm for release
   G08J2       Pay Grade/Step Administration 03  Create Review Work Group  J082005  P082005            New pgm for release
                                     04  Review Work Group Summary J082009                              New pgm for release
                                     05  Review Work Group Detail  J082007                              New pgm for release
                                     06  EE Master/EE Job File Update J082008  P082008                 New pgm for release
   G08J4       Job Specifications Setup 15  Pay Grade Step Table   J082003                              New pgm for release
   G08P1       Position Control      17  Position Headcount        J081441     P081441                  New pgm for release
   G08P3       Position Control Advanced/Tech 18  Requested  (J08902) J08902    P08902      ZJDE0001    New pgm for release
                                     19  Approved      (J08902) J08902    P08902      ZJDE0002    New pgm for release
                                     20  Final         (J08902) J08902    P08902      ZJDE0003    New pgm for release
                                     22  Create Batch  (J08911) J08911    P08911      ZJDE0001    New pgm for release
   G08W2       Wage & Salary Administration 14  Compa-Ratio Calculation J082501  P082501             New pgm for release
   G08W4       Wage & Salary Administration 15  Pay Grade/Step Table   J082003                         New pgm for release
   G0911       Journal Entry, Reports, & Inqu 08  Post General Journal  J09800   P09800      ZJDE0001    * Review Security
   G0921       Account Reconciliation 08  Debit/Credit Match       J09131D     P09131D     ZJDE0001    New pgm for release
   G09211      Bank Statement Processing 10  Post General Journal Batches J09800  P09800    ZJDE0001    * Review Security
   G0931       G/L Advanced & Technical Opera 03  G/L Cash Forecasting J09520   P09520                 New pgm for release
   G09311      Batch Journal Entry Processing 02  Journal Entry Field Mapping J09110MAP  P09110MAP     New pgm for release
```

After you determine the changes you need to make, use one of the following methods to make your changes.

Copy the Entire Menu

Note: If you use this copy feature, any security you had set up for the affected menu must be set up again.

From the Post Upgrade Menu (G97R4), select Control File Updates. From the Control File Updates menu, select Copy DD, VO, DW, UDC, SVR, Menus.

```
99630                     Copy DD,VO,DW,UDC,SVR,Menus


From Library . . . . . JDFDTAALT    To Library . . . . . . ALTCOM


Dictionary Item. . . . _____    Language . __    Appl Ovr . ____
                                                      Scrn/Rpt . _____

Vocabulary Overrides . _____    Language . __    Appl Ovr . ____

DREAM Writer Form. . . _____    Language . __

User Def Codes Sys . . ____         Language . __
            Type. . __

Software Versions Rep. _____

Menu Identification. . _____

Generic Rate/Msg Sys . ____
            Type. . __

                  F24=More
```

1. Enter the appropriate libraries in the From Library and To Library fields, and the menu you want to copy in the Menu Identification field.

Update a Menu Selection

From the Control File Updates menu (G97R6), select Menu Selections.

```
00908                          Menu Selections             A J K DP F
Action Code. . . _        Menu Id. . .  _____        Lock.   _ _ _ _ _
Menu Title . . . _____  Display Level. _
Advanced/Tech. . _____   Setup Menu . _____
Menu Class . . . _            System Code. ____
-----------------------------------------------------------------------------
Selection. . . . 01           Description. _____
Job to Execute . _____    Batch. . . . _   Highlight. _      A J K DP F
Menu to Execute. _____    Help Inst Key _____   Sel Lock . _ _ _ _ _
Option Code. . . _            Option Key . _____    Version. . _____
Appl Override. . ____         Run Time Msg _____    Cntry/Reg ___
     1.                          13.
     2.                          14.
     3.                          15.
     4.                          16.
     5.                          17.
     6.                          18.
     7.                          19.
     8.                          20.
     9.                          21.
    10.                          22.
    11.                          23.
    12.                          24.
 F4-Skip To  F5-Updt w/Redisplay  F6-Browse  F18-Security Review  F9-Search
```

1. Inquire on the menu and make the appropriate changes.

Update the User-defined Code (UDC) Files

You might need to update the UDC tables based on information on the User Defined
Code Merge report (R987241).

How to use the User Defined Code Merge Report

Using the User Defined Code Merge report you printed earlier, identify the
UDC tables that have ** Already Exists in the Merge Result column. This means
that the new value in the Description 1 column was not added to your UDC
table because one exists already. You need to check these UDC tables to make
sure your codes are described accurately.

```
987241                          J. D. Edwards                    Date -   2/05/97
                           User Defined Code Merge                Page -        1
                                                                  From - JDFDTAALT
                                                                  To   - ALTCON
                                                                  Mode -

INS Code  Code   Description 1           Description 2      Cde  2nd  Cde  Merge
    Type                                                    Lng  Lne  Num  Result
00  CM           Address Book Credit Messages               02             F0004 Updated

00  HC           Special Handling Code-A/P Cks              03             F0004 Updated

00  IO           I/O Control Limit Exceeded                                F0005 Added
    IO   P03114  2000                                                      F0005 Added
    IO   P04257  250                                                       F0005 Added
    IO   P042571 250                                                       F0005 Added
    IO   P042572 250                                                       F0005 Added
    IO   P042573 250                                                       F0005 Added
    IO   P09131  1000                                                      F0005 Added
    IO   P09181  1000                                                      F0005 Added
    IO   P12214  250                                                       F0005 Added
    IO   P41200  100                                                       ** Already Exists
    IO   P41202  17                                                        ** Already Exists
```

Review and Update a UDC

From the Control File Updates menu (G97R6), select User Defined Codes.

```
00051                     User Defined Codes
                                      System Code. . . . . . . . : ____
                                      User Defined Codes . . . . : __
Action Code. . . . . . _              Skip To Code . . . _____

    Code            Description                 Description-2
  _____     _____    _____
  _____     _____    _____
  _____     _____    _____
  _____     _____    _____
  _____     _____    _____
  _____     _____    _____
  _____     _____    _____
  _____     _____    _____
  _____     _____    _____
  _____     _____    _____
  _____     _____    _____

F5=Code Types  F14=Memo  F15=Where Used  F18=Translate  F21=Print  F24=More
```

1. Inquire on a UDC table you want to review.

2. Verify whether your codes are described accurately. If necessary, change your descriptions to match those that appear on the report.

Update the Automatic Accounting Instruction (AAI) Files

You might need to update the AAI tables based on information on the New Automatic Accounting Instructions (AAI) report (R98727).

How to use the New Automatic Accounting Instructions (AAI) Report

Using the New Automatic Accounting Instructions (AAI) report you printed earlier, identify the automatic accounting instructions that the merge added. The merge assigned company 00000 to each new AAI and did not assign account numbers to them.

Based on the information in the Account Use Description column on the report, you might need to change company 00000 to your company number and indicate your account number. In some cases, you might need to add additional AAIs for your company or companies and assign appropriate account numbers.

Note: Do not add AAI GR.

```
98727                                    J. D. Edwards                      Page -    1
                                   New Automatic Acctg Insts(AAI)           Date -  2/05/97
                                                                           From - JDFDTAALT
                                                                           To   - ALTDTA
                                                                           Mode - Proof

   Item    Co   Sequence  Syst     Account Use
   Number       Number    Code     Description
   ------  ----- --------  ----     ----------------------------

   RV      00000    3.335  03     Unrealized Gain on Foreign
                                  Currency Payments
                                     RVxxx
                                        xxx - Currency code

   RW      00000    3.335  03     Unrealized Loss of Foreign
                                  Currency Payments
                                     RWxxx
                                        xxx - Currency code

   PCWHLD  00000    4.041  04     Withholding Taxes Payable
                                     To be used with the A/P
                                     Calculate Withholding
                                     Program
```

Review and Update an AAI

From the Control File Updates menu (G97R6), select Automatic Accounting Instr.

```
  00121                    Automatic Accounting Instr.

   Skip to Sequence Number. . _____

 O Sequence                              Company                      Item
 P Number  _____      Bus. Unit  Object  Sub       ____
     .010 Index of Auto. Acct. Instrs.                               X00
          -----------------------------
          General Accounting         1.
            Intercompany Accounts   1.2
            General Purpose Accts   1.01

     .011   Statement Totals       1.13                              X01
            Speed Codes            1.28
            Summarization          1.3
            Reconcilable Ranges    1.4
            Purge                  1.44

     .012   Foreign Currencies     1.53                              X012

     .013 G/L Interface (batch R/E) 1.5                              X013
          Form 1099 Transactions  1.51

 Opt:  1=AAI Rev  F5=Acct Struct by BU  F15=AAI Rev  F21=Print  F24=More Keys
```

1. Press F15 (AAI Revisions).

```
  0012                      Single AAI Revisions

 Action Code. . . . . . . . . . _
 Item Number. . . . . . . . . : _____
 Company. . . . . . . . . . . . _____

 Sequence Number. . . . . . . _____
 System Code. . . . . . . . . ____

 Account Codes                          Option      Options:
    Business Unit. . . . . . _____   _         O = Optional
    Object Account . . . . . _____          _         R = Required
    Subsidiary . . . . . . . _____        _         N = Not Used

 Account Use Description. _____
                         _____
                         _____
                         _____
                         _____


      F21=Print Automatic Accounting Instructions     F24=More Keys
```

2. Inquire on an Item number and change the account number for company 00000, or add new AAIs for your company or companies and assign appropriate account numbers.

Run the Menu Comparison Report/Update Menus

The Menu merge that ran during the upgrade did the following: added new menus, added new selections to existing menus, removed obsolete selections from menus, and changed selections on menus if there was a replacement program for an obsolete program.

The next step is to run the Menu Comparison report. Based on how you fill in the processing options, you may have additional manual work to update your menus.

1. From the Control Files Update (G97R6) menu, select Menu Comparison Report,

2. In the O (Option) field next to ZJDE0001, enter 1 (Execute).

```
   98312              Processing Options Revisions  Form ID. . . . +P98340 . . .
                                                    Version. . . . ZJDE0001 . .
   Menu Comparison Report                           Display Level. . .

   This job has various options described below. Enter the desired values and
   press ENTER to continue.

   UPDATE NEW MENUS:
   1. Enter '1' to update your production            1_____
      library with NEW menus. If left
      blank, new menus will not be created
      in your production library.

   **   If running this program as part of
        a release upgrade, new menus have
        already been added by menu merge.

   UPDATE 'G' MENUS:
   2. Enter '1' to replace existing 'G'              _____
      menus in your production library.  If
      left blank, existing 'G' menus will
      not be replaced.                                                        +

                        F5=Printer Overrides
   .......................                         ...............................
```

```
98312                    Processing Options Revisions   Form ID. . . . P98340
                                                         Version/Histor ZJDE
Menu Comparison Report                                   Display Level.

This job has various options described below. Enter the desired values and
press ENTER to continue.

FROM/TO LIBRARIES:                                                          -
3.   Enter the JDFDATA library name.               _____

4.   Enter your Production library name            _____
     containing the Menu files.














                         F5=Printer Overrides
```

```
98312                    Processing Options Revisions   Form ID. . . . P98340
                                                         Version/Histor ZJDE
Menu Comparison Report                                   Display Level.

This job has various options described below. Enter the desired values and
press ENTER to continue.

BYPASS COMPARE/REPORT:
5.   A difference in any of the fields
     listed below will cause the menu to
     print on the report.  Enter a '1' to
     bypass printing the field on the
     report:
             Description . . . . . . . . . .      _____
             Batch . . . . . . . . . . . .        _____
             Highlight . . . . . . . . . .        _____
             Help Instruction Key. . . . . .      _____
             Option Code . . . . . . . . .        _____
             Option Key. . . . . . . . . .        _____
             Version . . . . . . . . . . .        _____
             Run Time Message. . . . . . .        _____


                         F5=Printer Overrides
```

3. Fill in the processing options with appropriate information:

> **Note:** Processing option 1 MUST have a '1'.

For processing option 2, it is better to enter a '1' and go back and make your custom changes after the A9.1 'G' menus are copied into your environment, if you have done little customizing of JDE menus.

If you left processing option 2 as blank, a Menu Comparison report will be produced (R98340).

4. Using the Menu Comparison report, make changes to your menus by either copying the menus or changing individual selections. Procedures for both methods are detailed earlier in this section under Update the Menu files.

Update the Data Dictionary Files Using Data Dictionary Workbench

The Data Dictionary workbench is used to review and reconcile changes not automatically applied by the Data Dictionary merge. The fields that will be reviewed are those that had a 'C' on the DD Field Ownership screen in the plan used for the upgrade. The user will apply a resolution code that applies the change to the Data Dictionary files.

> **Note:** If all fields were set to 'J' on the DD Field Ownership screen used in the upgrade, you may bypass this section.

1. From the Control File Updates menu (G97R6), select Data Dictionary Workbench. After reading the WARNING press F6.

2. Enter the name of the upgrade plan in the processing option on the Data Dictionary Workbench initial screen. Press Enter.

```
  98312                   Data Dictionary Workbench    Form ID. . . . P97806 . . . .
                                                        Version. . . . ZJDE0001 . .
  Data Dictionary Workbench                             Display Level. . .

  This job has various options described below. Enter the desired values and
  press ENTER to continue.

  Enter the Upgrade Planner Environment
   name (Example: ZJDE):                               A91 ALT_____



                        F5=Printer Overrides
```

3. The Data Dictionary Workbench screen (97806) appears.

   The From lib is the A9.1 JDF type library from your upgrade plan.

   The To Lib is the name of the library for the Data Dictionary merge on the merge information screen of your plan.

   'AJ' in the Resolution Code (Rs Cd) column indicates that the changes were applied by the Data Dictionary merge.

A blank in the Rs Cd column shows which Data Dictionary items need to be reconciled.

```
97806                              Data Dictionary Workbench   Plan Name. A7391
Action Cd  I
DD Field .  *            OR  *              OR  *
Resolution *            Original Value  *
Data Item.  *            New JDE Value.  *
Scrn/Rpt .  *            Alias Type  *     Fld Alias  *
Appl Ovrrd  *            Language .  __    From Lib. JDFDTA91    To Lib.  JDFD73159

O  Rs     Data         DD                                               Appl L
P  Cd    Item        Field    Current Value                            Ovr   __
_  AJ #AB         SY        00
_  AJ #ACF        SY        10C
_  AJ #ADD        DSCA      Address Line 7 (State & Postal Code)
_  AJ #ANP        HLP1      P01200
_  AJ #BUF        SY        10C
_  AJ #CA         ERO1      Y  N  F  '  '
_  AJ #CA         ERUL      VALUE
_  AJ #CBA        HLP1      P0030W     ┌─────────────────────────────┐
_  AJ #CLC        DVAL                 │  Pressing F4 displays changes │
_  AJ #CLP        DVAL                 │          to Data Items        │
_  AJ #CYR        DVAL      20         └─────────────────────────────┘
_  AJ #DAT        ERO1

  Opt:  1=Specifications   2=Glossary   3=Where Used
```

4. The Data Dictionary Workbench can be queried by any of the fields in the header portion of the screen. The help instructions provide a detailed explanation of search capabilities for the workbench.

Each Data Dictionary item that does not have 'AJ' in the Rs Cd column requires a decision. In order to apply changes, you must place 'C' in the Action Cd field and press Enter to activate the Rs Cd field. F4 shows you the original value for the Data Dictionary field and the New A9.1 JDE Value.

The options are:

'J' – The JDE World value is applied to your Data Dictionary.

'C' – Your original value for the specified Data Dictionary field is retained.

'M' – Manual Change has been applied.

Create/Print ASI Report/Apply ASIs/DREAM Writer Workbench

From the Post Upgrade Menu (G97R4), select Create ASI Report.

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

```
98302                    Print Instructions(ASIs)      Form ID. . . . P98490
                                                        Version. . . . ZJDE0002
ASI Report Instructions by System

      I    Explanation                           . . Selection . .
      N                                          Rel.        Value
      Y  Release. . . . . . . . . . . . . . . .  EQ  A81
And   Y  Install System Code. . . . . . . . . .  EQ  *ALL
And   Y  ASI Type . . . . . . . . . . . . . . .  EQ  *ALL
And   Y  Priority . . . . . . . . . . . . . . .  EQ  *ALL
And   Y  ASI Parameter. . . . . . . . . . . . .  EQ  *ALL
And   Y  Menu Job to Execute. . . . . . . . . .  EQ  *ALL
And   Y  SAR Number . . . . . . . . . . . . . .  EQ  *ALL




      F4-Extra Data    F5-Updt w/Redisplay    F16-Display All Data Fields
```

1. Change the Release value to A91, and press Enter.

Print ASI Report

From the Post Upgrade Menu (G97R4), select Print ASIs.

1. Print the following reports if you created them in the previous item:

R98490	ASI Report

Work with Application Specific Instructions (ASIs)

Display the ASIs

From the Post Upgrade Menu (G97R4), select Work With Instructions (ASIs).

```
98292                   Work With Instructions(ASIs)
Reporting System ____                        Release . . .  A91
Types. . . . .  __ __ __ __   New Software Library (From) . . . JDFDTAALT
ASI Status Selection . . . . . *  Current Common Data Library(To) . ALTCOM
                              Current World Writer Library(To). _____
O  SY                                          Last
2  CD _____    Type _____   Item   Updated1




    Opt:  3-Copy  4-Select ASI    F3-Exit   F5-Select ALL ASI   F24-More Keys
```

1. In the Release field, type A91.

2. In the New Software Library (From) field, type the name of the JDE type library from your plan.

3. Leave the value in the ASI Status Selection field set to an asterisk (*), which displays all ASIs (whether applied or not).

4. In the Current Common Data Library (To) field, type the name of the common library that contains the control files you want to update.

5. If you have the World Writer system, in the Current World Writer Library (To) field, type the name of the production data library that contains the F82100 World Writer file.

6. After you verify your information, press Enter and then press F5 (Select ALL ASIs).

    The screen lists all the ASIs for the application systems you have on your machine.

Apply the ASIs

▪   If an ASI affects a file located in a library that is different than the one appearing in the Current Common Data Library (To) field on the Work With Instructions (ASIs) screen, change the library name in that field to the appropriate one.

▪   For DREAM Writer ASIs, each one instructs you to update a certain version for a form ID. You should update any other versions that are based on that version also.

▪   If you need to update secured DREAM Writer versions, you must unsecure them first by using the Report Version selection from the Security Officer menu (G94).

▪   The user ID on versions you update will change to the ID of the user who makes the changes.

    Note: Some of the ASIs may already be done in your environment. For A9.1, some of the ASIs are from previous A7.3 and A8.1 cumulative updates.

1. From the Work With Instructions (ASIs) screen, press Enter.

    The detail for the first ASI listed and selected on the Work With Instructions (ASIs) screen appears.

```
98291                       ASI Inquiry/Update              A81

Ty / Item. . . . . . UD / 00IO
Priority . . . . . . 1
_____

User Defined Codes

  Install System Code:  00           User Defined Code Type:  IO
                                          (I/O control limit exceeded)
                                      Procedure:  Change

  Reason:  P09200 now contains the I/O Control Limit Exceeded program
           (P00IO) which uses this UDC table to determine lines read.

    From the General User Defined Codes screen (P00051), add the following
    character (or digit) code(s).

      CHAR.
      CODE        DESCRIPTION                   DESCRIPTION-2

      P09200      1000

Enter=Go to Next ASI F6=Copy New to Prod F10=Chg Prod F11=View New F24=More
```

2. At this point, ASIs are applied two ways:

   - Copy the item affected by this ASI in its entirety from the
     JD Edwards World data library to your production data library, or

   - Update specific data associated with the item according to information
     contained in the ASI.

   Note: If the Procedure on the ASI does not say COPY (F6) we recommend
   you apply the change manually (F10).

   To copy the item in its entirety (F6).

   To copy an entire item from the JD Edwards World data library, press F6 (Copy
   New to Prod). The Record Transfer screen appears with the appropriate fields
   filled in. Press Enter to copy the item and return to the ASI Inquiry/Update
   screen. Press Enter again to continue to the next ASI.

   Note: This copy feature cannot be applied to automatic accounting
   instructions (AAIs) or next numbers.

   To update specific data associated with the item (F10).

   To update the data, press F10 (Change Prod). The appropriate screen from
   which to manually apply this ASI appears. After you update the item, press F3
   to return to the ASI Inquiry/Update screen. Press Enter to continue to the next
   ASI.

3. Continue to apply the ASIs by using the above methods until the Work With
   Instructions (ASIs) screen reappears. The Last Updated fields indicate the
   library locations where the ASIs were applied.

   MULTI-PLANS: The Last Updated fields will help you determine the last library
   in which the ASIs were applied.

Use the DREAM Writer Review Workbench

The DREAM Writer Review Workbench (contained in files F9835, F9836, F98361, and F9837) allows you to review changes the DREAM Writer merge made to many of your versions.

Because some versions either have no user interface or are recursive in nature, you must review them at this time. The workbench identifies the Form IDs for these versions with a review type of asterisk (*), which indicates mandatory review.

You will need to review other versions that the upgrade process changed. However, you do not need to review them at this time. They include changes to processing options, data selection, and data sequencing. You can review the versions now by using the workbench (use a review type of blank, which includes versions of review type *). If you do not review them at this time, users will be required to review them as you use them. When you attempt to run one of these versions for the first time, a window appears that indicates the DREAM Writer parameters that have changed for that version. If users are reviewing the versions at runtime, they should pay special attention to Processing Option changes. Values should be reviewed as they may have shifted to a new sequence in the processing options.

> **Note:** You must have proper authority to use the DREAM Writer Review Workbench. Otherwise, you will receive a security error when you attempt to change a version. To unsecure a Form ID and its associated versions, select Report Version from the Security Officer menu (G94).

There are some DREAM Writer forms for which the based on file has changed. It is important that you verify and possibly correct the data selection and/or sequencing on versions you created at A7.3 or A8.1 before attempting to run your DREAM Writer versions of these forms. The following is a list of DREAM Writer forms where the Based on File changed and which version you should use for verifying that the data selection/sequencing is set correctly for your versions. If more than one version is listed for verification, you will want to use the version that you based your customer version on.

DREAM Writer FORM	Version to Use for Verification
P013151	ZJDE0001
P74SC125	XJDE0001
P74SL650	XJDE0001
P082800	XJDE0001 or XJDE0002
P062001	XJDE0001
P00PURGE	ZJDE0029, ZJDE0030, ZJDE0031, ZJDE0032, ZJDE0045, or ZJDE0046
P30820	ZJDE0001
P30835	ZJDE0001
P3411A	ZJDE0001

DREAM Writer FORM	Version to Use for Verification
P39120	XJDE0001 or XJDE0003
P42642	ZJDE0001
P42995	XJDE0001, XJDE0002
P471411	ZJDE0001
P48210	ZJDE0001
P42642	ZJDE0001

1. From the Post Upgrade Menu (G97R4), select DREAM Writer Review Workbench.

```
98351                    DREAM Writer Review Workbench    Review Type. . *
                                                          System Code. . ____

Skip To Form ID. . _____

O     Form           Description
P      ID   _____
_    P40211Z    Batch Order Edit and Creation - Sales
_    P42520     Pick Slips Print
_    P42565     Sales Order Invoices Print
_    P42950     Update Sales Order Cost/Price
_    P43500     Purchase Orders Print
_    P48425     Equipment WO Print




     Opt: 1-Version Review              F24-More Keys
```

By default, the screen lists the Form IDs you must review at this time (record type *).

Note: If you want to list all Form IDs that require your review, enter a blank in the Review Type field.

2. To list all of the versions associated with the first form ID, in the OP (Option) field next to it, enter 1 (Version Review).

```
98352                   DREAM Writer Version Review      Form . . P40211Z
                                                         Type . . ±
                                                         Mandatory Review
Skip to Version. . . _____

O   Version        Description
R   _____      _____
_   DARREN
_   JMM0001
_   MARKUS3
_   NRJ
_   SCT            Batch Sales Order Edit/Creation - Recur
_   TC
_   ZJDE0001       Batch Sales Order Edit/Creation
_   ZJDE0002       Batch Sales Order Edit/Creation - Single
_   ZJDE0003       Transportation Batch S/O Edit/Create
_   0001
_   0002



    Opt: 1-Perform Review  5-Clear All Issues  7-Display Log    F24-More
```

3. In the OP (Option) field next to the first version, enter 1 (Perform Review).

   Note: If you do not want to review a specific version, in the OP (Option) field next to the version, enter 5 (Clear All Issues).

```
9835       DREAM Writer Review
 Form . . P40211Z     Version. DARREN


 Updates to this version have occurred as
  a result of an upgrade.  The following
  parameters should be reviewed prior to
  executing this version:

          1  Processing Options



Opt: 1-Review  F6-Proceed w/o Rev   F24-More
```

This window shows the DREAM Writer parameters that you need to review. Possible parameters include processing options, data selection, and data sequencing. Some versions do not require you to review all three parameters, such as the one above.

4. To review the parameters, make sure the parameter fields are set to 1 (Review), and press Enter.

   When you review the parameters, the field values you need to check are highlighted. Verify that they will produce the results you expect. If you do not want to review the changes, press F6 to continue.

   Note: To examine the fields that the upgrade process deleted for data selection, or that the process changed or deleted for data sequencing, press F17.

5. Repeat these procedures for each version associated with a Form ID that requires your review.

   MULTI-PLANS: You must sign on as a user to each production library that contains a DREAM Writer file.

Go to the Next Phase

Phase Four – Run Special Application Jobs

Sign on as a User Who Accesses the Data Library You Will Be Updating

Note: If you are upgrading to an alternate environment as recommended, sign on as a user who accesses the alternate data library you want to update.

Access the Post Upgrade Menu

From any JD Edwards World menu, enter G97R4.

```
G97R4                        PeopleSoft World                   JDEWDS3
Setup Operation              Post Upgrade Menu

... UPDATE APPLICATIONS                  ... CREATE FILES/RUN JOBS
 2. Print Upgrade Reports                14. Build New Files List
 3. Control File Updates                 15. Create New Files
 4. Create ASI Report                    16. Rebuild Menu Word Search
 5. Print ASIs                           17. Run Special Application Jobs
 6. Work With Instructions(ASIs)
 7. DREAM Writer Review Workbench        ... REVIEW REPORTS/STARTUP
                                         23. Utilities
                                         24. Start JDE Subsystems


Selection or command
===> _

Thu, Oct 19, 2006              A91 GSC Testing                  DK5976993
 1:33:11pm               Copyright © 2006, Oracle.              QPADEV002D
```

Rebuild Menu Word Search

From the Post Upgrade Menu (G97R4), select Rebuild Menu Word Search.
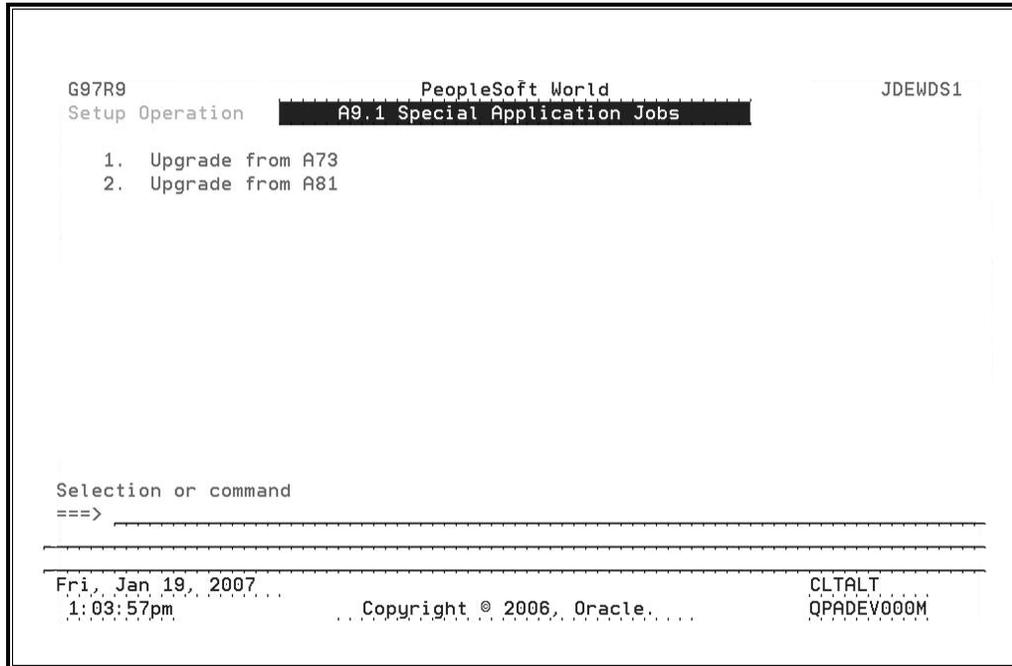
The job submits to batch.

Run Special Application Jobs

Note: You must select jobs in the order in which they appear for a product group. Be sure to read the menu message that appears after you select a job.

MULTI-PLANS: You must run the appropriate special application jobs against each data library defined in your plans.

1. From the Post Upgrade Menu (G97R4), select Run Special Application Jobs.

   The A9.1 Special Jobs Menu appears.

```
G97R9                        PeopleSoft World                        JDEWDS1
Setup Operation      ▐ A9.1 Special Application Jobs ▌

     1.  Upgrade from A73
     2.  Upgrade from A81












 Selection or command
 ===>  _____
 _____
 Fri, Jan 19, 2007                                       CLTALT
   1:03:57pm              Copyright © 2006, Oracle.      QPADEV000M
```

Each of the selections that appear on this menu access an A9.1 Special Application Jobs menu specific to the release level you are upgrading from.

2. From this menu, select the release you are upgrading from.

   The appropriate A9.1 Special Application Jobs menu appears, as shown in the example below.

```
G97R93                    JD Edwards World                      JDED
Setup Operation       A7.3-A9.1 Special Application Jobs

    ... UPGRADE FROM A73
    2.  Technical
    3.  Financials
    4.  Payroll/Human Resource Mgmt
    5.  Distribution
    6.  Manufacturing
    7.  Brazilian Localizations
    8.  Argentina Localizations




Selection or command
===>  _____
      _____
      _____
Fri, Apr 13, 2007      A9.1 Development W/ANALYZER           LH3914
 6:20:51pm              Copyright © 2006, Oracle.            QPADEV0056
```

3. Required jobs are listed by product group. To display the jobs for a particular product group, select the appropriate product group from the Special Application Jobs menu.

4. Run the jobs for each product group that you have installed.

> **Note:** If you are running any special application jobs to build logical files that did not built during create new files because of duplicate records, you must first delete the logical file from your environment if it exists as it would have been created with no members during the create new files process.

5. Corrections to special jobs menu messages:
- G97U13 option 11 only requires customers to apply step 3.
- G97U63 option 7 menu message is incorrect. This job is for customers prior to A7.3 CU 9 or A8.1 CU 2.
- G97U33 option 13 can be ignored.
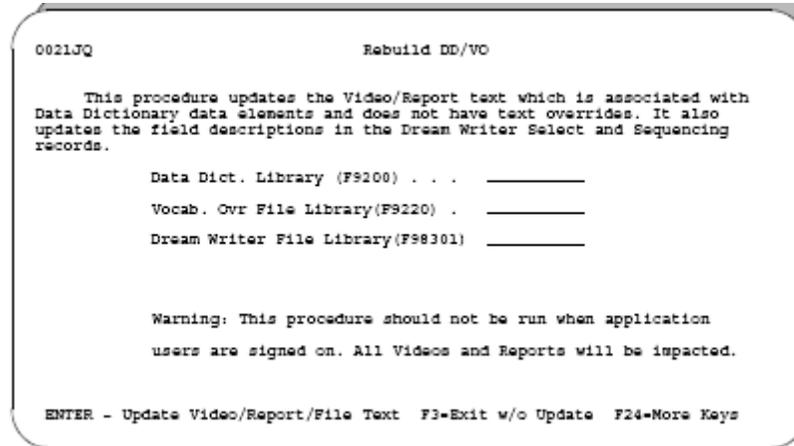
Activate Triggers

If you deactivated Database Audit Manager triggers prior to setting up your alternate environment, use option 8 on menu G946 to activate the triggers in your alternate environment.

CALL PGM(JDFOBJALT/J98206CV1) to convert the old Database Audit Manager triggers to the new Database Audit Manager named triggers.

If you removed other triggers as a result of the PRTTRGPGM command or the query report produced by Step 2 of the upgrade, you may now reattach those triggers to your files in the alternate environment.

Rebuild DD/VO

From the Post Upgrade Menu (G97R6), select Rebuild DD/VO ONLY if you used the Data Dictionary workbench to apply any row or column changes.

```
0021JQ                          Rebuild DD/VO

      This procedure updates the Video/Report text which is associated with
Data Dictionary data elements and does not have text overrides. It also
updates the field descriptions in the Dream Writer Select and Sequencing
records.

            Data Dict. Library (F9200) . . .    _____

            Vocab. Ovr File Library(F9220) .    _____

            Dream Writer File Library(F98301)   _____



            Warning: This procedure should not be run when application

            users are signed on. All Videos and Reports will be impacted.


ENTER - Update Video/Report/File Text  F3=Exit w/o Update  F24=More Keys
```

1. From the Rebuild DD/VO screen, enter the names of the libraries where your data dictionary, vocabulary overrides, and DREAM Writer files are located. The job submits to batch.

Only if you Use a Comma for the Decimal Character

If your system uses a comma (,) for the decimal character, complete the checklist items in *Appendix F - Change Decimal Character*. Otherwise, continue to the next checklist item.

Go to the Next Phase

Phase Five – Print and Review Reports

This phase shows what you must do to ready your alternate environment for use.

Access the Post Upgrade Menu

From any JD Edwards World menu, enter G97R4.

Work with 'Z' Libraries

The work libraries are named Library where library is the name of your common or production data library. You must display your 'Z' libraries. You must delete all empty 'Z' libraries.

> **Note:** If a 'Z' library is not empty, an unresolved file conversion problem may exist. For assistance, call JD Edwards World Worldwide Customer Support.

1. From the Post Upgrade Menu (G97R4), select Utilities.

2. From the Upgrade Utilities menu (G97R42), select Work with 'Z' Libraries.

3. In the Library field on the Work with 'Z' Libraries screen, enter Z*. The 'Z' libraries are listed.

4. To view the contents of a library, enter a 5 (Display) in the Opt field next to the library name.

5. If the library is empty, from the Work with 'Z' Libraries screen, enter 4 (Delete) in the option field next to the library.

Sign on as JDEINSTAL to Access the Software Upgrade Menu

```
A97JDE                      JD Edwards World                    JDEWDS4
                           Software Upgrade Menu

        Plan The Upgrade                       Upgrade Utilities
    2.  Work with Upgrade Planner        14.  Print ASI Report
    3.  Print Upgrade Validation Report
    4.  Stop JDE Subsystems

        Upgrade The Software                   File Conversion Utilities
    7.  Change Messages to Break Mode     20.  Inquire on Conversion Status
    8.  Start the Upgrade                 21.  Conversion Status Report
                                          22.  Conversion Schedule Report

        New Installations
   _11. World Express Install


   90.  Signoff

   Selection or command
   ===> _____

   Enter     F3=Exit      F4=Prompt        F6=Messages         F9=Retrieve
   F10=Command entry      F14=Submitted jobs    F18=Spooled Files   Help(Alt-F1)
```

Print the File Conversion Status Report

JD Edwards World recommends that you print this report for your records.

1. From the Software Upgrade Menu (A97JDE), select Print File Conversion Status Report.

    The Version Selection screen appears for form ID P972612.

2. In the O (Option) field next to version ZJDE0001, enter 3 (Add).

3. Press Enter until the Data Selection screen appears.

4. In the Value field for Plan Name, type the name of the upgrade plan that defines the environment for which you want to run the report.

5. Press Enter until the Version Selection screen appears again.

6. In the O (Option) field next to the version you created, enter 1 (Run).

7. When the job finishes, print the report.

Review the Upgrade Reports

After you complete Phase Four, you can review the various reports the system produced. Sign on as JDEINSTAL and type WRKSBMJOB. You may print the reports found under UPG_STEP2 (ALT_STEP2 for GO LIVE).

Sign off as JDEINSTAL

Sign on as a User who Accesses the Alternate Library

End the JD Edwards World Monitor

After you have completely upgraded, end the JD Edwards World monitor.

MULTI-PLANS: Do not end the JD Edwards World monitor until you have completely upgraded all alternate environments.

1. From the Post Upgrade Menu (G97R4), select Utilities.

2. From the Upgrade Utilities menu (G97R42), select End JD Edwards World Monitor.

Test in the Alternate Environment

You can operate your alternate environment at release level A9.1.
JD Edwards World recommends that you test the performance of the environment against your data files, and train your users at the new release. When you are satisfied with its performance, you are ready to use it to upgrade your production environment, which is described in the next phase.

Go to the Next Phase

Phase Six - Upgrade the Production Environment

This phase details all steps needed to upgrade your production environment.

> **Note:** Do not start this phase until you are satisfied with the performance of the upgraded alternate environment.

Review the Application/Technical Considerations in Phase One

> **Note:** For triggers, you will not be saving your production environment to set up an alternate environment. In addition, you will activate the triggers in the production environment later in this Phase.

Check for DDM Files

DDM files cannot exist in the data libraries, you need to convert for the upgrade to work successfully. Use the WRKDDMF command to check for DDM files. If any exist, delete the files using the DLTF command.

Set Up an Upgrade Plan for the Production Environment

You must create an upgrade plan that is based on the one you used to upgrade the alternate environment. In addition to the setup instructions given for the upgrade planner in Phase One, follow these guidelines.

1. Inquire on the upgrade plan you used to upgrade the alternate environment, and add a new plan to upgrade your production environment.

2. Your Libraries for this plan screen should look similar to the one below, which is based on the ZJDE_ALT model. Change the library names for library types DTA, COM, and SEC to match the libraries in your production environment (see highlighted areas on the screen below). For instance, type the name of the common library that is in your production environment in the Library Name field for library type COM. The library names may not be the same as the ones shown on the screen below. The JDF, OBJ, and SRC libraries for the plan are the A9.1 libraries that were restored to your alternate environment.

```
96003                       Plan the Upgrade                Screen 1 OF 3
   _                     Libraries for this plan

Plan Name. . . . . . PROD        TEST (ALTERNATE) PLAN

Specify all libraries for the  plan that contain J.D. Edwards
files and programs.  Exclude IBM libraries such as QGPL and QTEMP.
Specify current software release level and the release to upgrade to.
                  Current JDE Release Level. . . .   A73
                  New JDE Release Level. . . . . .   A91
                  Production LSF Library . . . . .   JDFOBJALT
                  Install Source Library . . . . .   0     (1=Yes, 0=No)
                  Install Object/Data Libraries. .   0

          Lib    Library            Library
          Typ     Name            Description
          COM    CLTCOM     CLIENT'S COMMON LIBRARY
          DTA    CLTDTA     CLIENT'S DATA LIBRARY
          SEC    CLTSEC     CLIENT'S SECURITY LIBRARY
          JDF    JDFDTAALT  JDE DATA LIBRARY   (ALTERNATE)
          OBJ    JDFOBJALT  JDE OBJECT LIBRARY (ALTERNATE)
          SRC    JDFSRCALT  JDE SOURCE LIBRARY (ALTERNATE)

          Enter=Update/Next Screen     F12=Previous Screen    F24=Move Keys
```

3. The Install Source Library and Install Object/Data Libraries fields must be set to 0.

4. On the Production LSF Library line, specify the OBJ library name from your plan.

> **Note:** If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears.

```
96003X      REINSTALL LANGUAGE EXCEPTION

 PLAN NAME: PROD
 CODED CHARACTER SET (CCSID) MISMATCH

 DATA DICTIONARY FILE (F9201) CCSID . . : 00285
 DREAM WRITER FILE (F98301) CCSID . . . : 00037
 QCHRID SYSTEM VALUE CCSID. . . . . . . : 00037

 REINSTALL MUST USE CCSID OTHER THAN  65535.

 PLEASE ENTER CCSID VALUE TO USE. . . . : 00285

 ENTER=CONTINUE  F3=EXIT  F12=PRV SCRN
```

In this case, contact JD Edwards World Worldwide Customer Support for assistance.

5. Verify the library names on the Merge Information screen. JD Edwards World recommends that you do not change the merge modes.

6. Do not change the settings on the Data Dictionary Field Ownership screen.

7. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. Be sure that your plan does not have errors or duplicate files before you continue to the next item. Use *ALT for the 4th processing option.

Sign on as JDEINSTAL to Access the Software Upgrade Menu

```
A97JDE                    JD Edwards World                  JDEWDS4
                         Software Upgrade Menu

        Plan The Upgrade                     Upgrade Utilities
    2.  Work with Upgrade Planner        14. Print ASI Report
    3.  Print Upgrade Validation Report
    4.  Stop JDE Subsystems

        Upgrade The Software                 File Conversion Utilities
    7.  Change Messages to Break Mode    20. Inquire on Conversion Status
    8.  Start the Upgrade                21. Conversion Status Report
                                         22. Conversion Schedule Report
        New Installations
 _11.  World Express Install


   90. Signoff

Selection or command
===> _____

Enter     F3=Exit      F4=Prompt          F6=Messages        F9=Retrieve
F10=Command entry    F14=Submitted jobs   F18=Spooled Files  Help(Alt-F1)
```

Stop JD Edwards World Subsystems

Sleeper (required)

1. From the Software Upgrade Menu (A97JDE), select Stop JD Edwards World
    Subsystems.

2. From the Stop JD Edwards World Subsystems menu, select Sleeper.

Order Processing (if installed)

1. From the Stop JD Edwards World Subsystems menu (A97JDE2), select Order
    Processing (If Installed).

2. Enter the name of your Order Processing subsystem, and repeat this step for
    each additional subsystem you may have.

Human Resources (if installed)

1. Be sure your Human Resources monitor has finished processing any history
    entries.

2. After processing completes, from the Stop JD Edwards World Subsystems menu
    (A97JDE2), select Human Resources Management (if installed).

3. Enter the name of your Human Resources subsystem, and repeat this step for each additional subsystem you may have.

Back up Libraries

Back up all libraries that appear in the upgrade plan for the production environment.

Be Sure Users are not Accessing the Libraries you Want to Upgrade

Perform the following procedure for any common, production, object, and security libraries you want to upgrade.

1. On the command entry line, type WRKOBJLCK, then press F4 (Prompt).

The Work with Object Locks screen appears.

2. In the Object field, type the production data library name.

3. In the Library field, type QSYS.

4. In the Object Type field, enter *LIB.

5. Repeat for each library you want to upgrade.

Start the Upgrade

1. From the Software Upgrade Menu (A97JDE), enter DSPMSG JDEINSTAL to display messages issued during the upgrade process for the alternate environment.

2. Press F13 to clear all of these messages.

3. From the Software Upgrade Menu (A97 JDE), select Start the Upgrade.

```
                    JDE Upgrade Command (JDEUPGRADE)

    Type choices, press Enter.

    Upgrade Type . . . . . . . . . .   _____      *PTF, *INSTALL, *REINSTALL...
    Upgrade Plan Name  . . . . . . .   _____      From Upgrade Planner
                    + for more values  _____
    Source Media . . . . . . . . . .   _____      Device Name, *SAVF, *DISK
    Current JDE Release Level  . . .   _____      From Upgrade Planner
    New JDE Release Level  . . . . .   _____      From Upgrade Planner
    Run Validator Program  . . . . .   1               1=Yes, 0=No




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

4. In the Upgrade Type field, enter *ALT.

5. In the Plan Name field, type the name of the upgrade plan that defines the
    environment you want to upgrade.

    MULTI-PLANS: If you are upgrading more than one environment (multiple
    plans), enter a plus character (+) in the second Plan Name field, and then enter
    the additional plans in the fields provided.

6. In the Source Media field, type *DISK.

7. In the Current JD Edwards World Release Level field, type the current
    JD Edwards World software release level of the environment you want to
    upgrade.

    This release level must match the current JD Edwards World release level
    specified in the upgrade plan.

8. In the New JD Edwards World Release Level field, type A91.

    This release level must match the new JD Edwards World release level specified
    in the upgrade plan.

9. Leave the default values in the Run Validator Program and Hold Install Job on
    Job Queue fields.

10. After you verify the information, press Enter.

    The upgrade process, which has two steps, begins. Step 1 (ALT_STEP1) sets up
    work files. Step 2 (ALT_STEP2) converts files and runs control file merges in the
    production environment.

> **Note:** If the reinstallation process encounters inconsistent code character set IDs (CCSIDs) in your files, it produces a report (CCSIDLIST) that lists your inconsistent files and their associated CCSIDs. This report is for your information only. The reinstallation process automatically changes the CCSIDs for these files and runs conversions on them. Keep this report in case you encounter problems with files that are listed on it when you use the production environment.

> **Note:** Step 2 will halt if there are trigger programs attached to files in your production environment data libraries. A query report is produced listing the files with triggers attached. Use the RMVPFTRG command to remove the triggers. You may restart the Upgrade by typing *ALT for the Upgrade Type and *DISK for Source Media on the Start the Upgrade command.

After ALT_STEP2 completes, the upgrade process rebuilds the field reference files (FRFs) and the JD Edwards World message file automatically (job J98FRFGEN).

MULTI-PLANS: ALT_STEP1 builds the work files for all plans. A separate ALT_STEP2 job performs file conversions and merges for each plan.

> **Note:** The upgrade process produces job logs (QPJOBLOG) for ALT_STEP1 and ALT_STEP2. Keep job log files (QPJOBLOG) in an output queue where they will not be deleted. They are extremely useful for resolving upgrade issues. The ALT_STEP1 job log shows what happened during the building of work files in the upgrade process. The ALT_STEP2 job logs show what happened during file conversions and merges.

Inquire on File Conversion Status

After the ALT_STEP1 and ALT_STEP2 jobs complete, check for file conversion problems as you did in Phase Two. When you inquire on file conversion status, specify the common and production data libraries that appear in the upgrade plan you used to upgrade your production environment.

MULTI-PLANS: You must inquire on file conversion status for each plan. Specify each plan name and the associated library name. Do not check file conversion status for an upgrade plan until the associated STEP2 job has finished. The message STEP 2 Completed for Plan name appears for each plan where name is the name of the plan.

> **Caution:** Do not proceed until you receive the message: 'You may now sign on using your JDE profile to continue'.

Create or Modify a User Profile to Access the Partially Upgraded Production Environment

This profile must access the alternate A9.1 object library, and the converted common and production libraries (for example, QTEMP JDFOBJALT ALTSEC CLTCOM CLTDTA QGPL). For specific steps, see *Appendix E -Create or Modify a User Profile*.

MULTI-PLANS: You must create a profile to access each partially upgraded environment.

> **Note:** If you are upgrading from a release prior to A73 CU 15 or A8.1 CU 6, duplicate the F00944 file with no data from the JDF type library in your plan to your library containing the F0092 file. Sign on with the User Profile you Created or Modified for the Partially-upgraded Production Environment.

> **Note:** Sign on with the User Profile you Created or Modified for the Partially-upgraded Production Environment.

Create New Files

See *Phase 3* for instructions on *Create New Files*. You must create new files in the common and data libraries in your production environment. The library names you use are those you used in the upgrade plan to upgrade your production environment.

Update your Applications

This section explains what you must do to update your JD Edwards World system applications in the production environment.

If you were able to monitor control file changes as described in Phase One, follow the guidelines in Control File Changes Monitored.

If you were not able to follow one of the methods for monitoring control file changes, follow the guidelines in Control Files Changes Not Monitored.

Control File Changes Monitored

If you monitored control file changes, you can copy most of the control files from the alternate common library (ALTCOM) to the common or data library in your production environment. If a file can be copied, you do not have to reapply manual changes. You can use Net Change Analyzer (menu G97NCA) to verify that control files are in sync before you copy files.

The control files that can be copied are as follows:

Control File Type	Control File
Automatic Accounting Instructions	F0012
Menu	F0082, F00821, F0083, F009190, F009690, F009790
Data Dictionary	F9200, F9202, F9203, F9204, F9207, F9210, F9816, F98163
DREAM Writer	F98301, F98302, F98303, F9831, F98311, F98312, F9835, F9836, F98361, F9837
User Defined Codes	F0004, F0004D, F0005, F0005D
Vocabulary Overrides	F9220, F9601, F9601D, F9611, F9620, F9621
World Writer	F8201, F82013, F82100, F82101, F82102, F82103, F82104, F82105, F82106, F82107, F82108, F82100E, F82109, F9401
	Note: World Writer and Automatic Accounting Instructions are not considered control files but are files that can be copied from the alternate environment if changes were monitored.

To copy files, sign on as JDEINSTAL and issue the CPYF command:

CPYF FROMFILE(ALTCOM/*ctrlfile*) TOFILE(PRODXXX/*ctrlfile*)
MBROPT(*REPLACE)
where *ctrlfile* is the control file name you want to copy.

Note: The Next Number file (F0002) cannot be copied. You must apply the manual changes to the newly converted file in the common library of your production environment. Any Special Instructions ASIs also need to be completed.

Note: If you use system 12 (Fixed Assets) or system 83 (FASTR), and if you will be copying DREAM Writer files, you must copy the following files also.

For system 12 - F12603 through F12609

For system 83 - F8303 through F8309

You must have used the dual maintenance method of monitoring DREAM Writer, FASTR, and STAR changes as described in Phase One. See the IMPORTANT NOTE in the Monitoring changes to JDE control files item in Phase One - Plan the Upgrade.

Control File Changes not Monitored

If you cannot copy some or all of the control files, you must reapply manual changes to the files.

To apply the manual changes, sign on with the user profile you created or modified for the partially upgraded production environment.

Perform all the procedures in Phase Three, with the following guidelines:

- If you were unable to copy the Automatic Accounting Instruction (AAI) file, print the AAI report (R98727) and perform the manual changes.

- If you were unable to copy the User Defined Code (UDC) files, print the UDC report (R987241) and perform the manual changes.

- If you were unable to copy the Menu files, print the menu reports (R97883A, R97883B, R97883C) and perform the manual changes. In addition, Run the Menu Comparison Report and update menus if required.

- If you were unable to copy the Data Dictionary (DD) files and had some of the values on the Data Dictionary Field Ownership screen of the upgrade plan set to C, use the Data Dictionary workbench to apply changes.

- Print and perform the ASIs pertaining to the control files you could not copy.

- Review the DREAM Writer (DW) Review Workbench only if you were unable to copy the DW files.

Be Sure you are Signed on with the User Profile you Created or Modified for the Partially-upgraded Production Environment

Run Special Application Jobs, and Review Upgrade Reports

Perform the procedures in Phase Four and Phase Five with the following guidelines:

- When the instructions ask for an upgrade plan name, enter the one you used to upgrade your production environment.

- If you made manual changes in the data dictionary, using the Data Dictionary Workbench, run the Rebuild DD/VO from G97R6

- If you made manual changes on menus, run the Rebuild Menu Word Search.

Change the JD Edwards World System Values

From the Security Officer menu (G94), select JD Edwards World System Values.

1. After you read the message screen that appears, press F6 (Execute). The first JD Edwards World System Values screen appears.

2. Verify that the alternate object library (JDFOBJALT) is in the QJDF Library Name field. Press Enter. The second JD Edwards World System

   Values screen appears.

3. In the Source Library field, type the name of the source library in your production environment if you have source code.

4. In the Object Library field, type the name of the object library in your production environment.

5. In the User Profile Library (F0092) field, type the name of the security library in your production environment (where your F0092 file resides).

6. In the Control File Library (F9200, F9220) field, type the name of the library where your F9200 and F9220 files reside. Your screen should look similar to the one below.

7. After you verify the information on this screen, press Enter and then F3 (Exit).

Change the JDE Profile

Define your library list for the JD Edwards World production libraries.

1. From the Security Officer menu (G94), select User Information.

   The User Information screen appears.

2. Inquire on user ID JDE. The user information for the JD Edwards World user profile appears.

3. In the Library List field, change the library list to the following:

   QTEMP *JDFOBJ JDFDATA* JDFSRC QGPL

   where *JDFOBJ* is the name of your object library in your production environment, *JDFDATA* is the name of the JD Edwards World data library, and JDFSRC is the name of your source library (if you installed source).

4. After you verify the information on this screen, press Enter and then F3 (Exit).

Change the IBM User Profile JDE

You must change this profile to match the JD Edwards World user profile. From the command entry screen, enter the following command:

CHGUSRPRF USRPRF(JDE INLPGM(JDFOBJ/J98INIT).

Rename the JD Edwards World Libraries

You can rename the object, source, and JD Edwards World data libraries in your production environment, or delete them if you have a backup. To rename them, sign on as JDEINSTAL, then change the names of the following libraries.

JDFOBJ	to	JDFOBJX
JDFDATA	to	JDFDATAX
JDFSRC	to	JDFSRCX (if you have source)

where *JDFOBJ* is the name of the object library in your production environment, *JDFDATA* is the name of the JD Edwards World data library, *JDFSRC* is the name of the source library, and X is 73 or 81, depending on the release level of your production environment before the upgrade.

If you want to delete the old release libraries, enter DLTLIB library where library is the name of the library you want to delete from your machine.

Rename the Alternate Libraries

Rename the alternate libraries so that they become your live production libraries.

JDFOBJALT	to	*JDFOBJ*
JDFDTAALT	to	*JDFDATA*
JDFSRCALT	to	*JDFSRC* (if you have source)

where *JDFOBJ* is the name of the object library in your production environment, *JDFDATA* is the name of the JD Edwards World data library, and *JDFSRC* is the name of the source library.

Start JD Edwards World Subsystems

Order Processing (if Installed)

1. From the Post Upgrade Menu (G97R4), select Start JD Edwards World Subsystems.

2. From the System Specific Startup menu, select Start Subsystem under ORDER PROCESSING.

3. Enter the name of your Order Processing subsystem, and repeat this step for each additional subsystem you may have.

Human Resources (if Installed)

1. From the System Specific Startup menu (G97R7), select Start Subsystem & Monitor under HUMAN RESOURCES MANAGEMENT.

2. Enter the name of your Human Resources subsystem, and repeat this step for each additional subsystem you may have.

Start the JD Edwards World Sleeper Subsystem

While signed on as a user with security officer authority, start the sleeper subsystem.

End the JD Edwards World Monitor

After you completely upgrade your production environment, end the JD Edwards World monitor.

1. From the Post Upgrade Menu (G97R4), select Utilities.

2. From the Upgrade Utilities menu (G97R42), select End JD Edwards World Monitor.

Sign on as a User that Accesses Your Production Environment

Make sure the libraries are properly renamed and the QJDF data area is set up correctly. If you are not able to sign on, call JD Edwards World Worldwide Customer Support. If you are able to sign on, you are ready to operate JD Edwards World software at release level A9.1 in a live production environment.

Review the DREAM Writer Versions

If you were not able to copy the DREAM Writer files and did not review all of the versions that the DREAM Writer Review Workbench identified for review in Phase Three, the following window appears whenever you run one of those versions for the first time in your production environment.

```
9835         DREAM Writer Review
  Form . . P40211Z    Version. DARREN


  Updates to this version have occurred as
   a result of an upgrade.  The following
   parameters should be reviewed prior to
   executing this version:

            1  Processing Options




Opt: 1=Review  F6=Proceed w/o Rev   F24=More
```

This window shows the DREAM Writer parameters that you need to review.
Possible parameters include processing options, data selection, and data sequencing.
Some versions do not require you to review all three parameters, such as the one
above. To review the parameters, make sure the parameter fields are set to 1
(Review), and press Enter.

When you review the parameters, the field values you need to check are
highlighted. Verify that they will produce the results you expect. If you do not want
to review them, press F6 to continue.

> **Note:** To examine the fields that the upgrade process deleted for data
> selection, or that the process changed or deleted for data sequencing, press
> F17.

After you review the parameters, the window does not appear again when you run
the version.

Activate Triggers

If you deactivated Database Audit Manager triggers prior to upgrading your
production environment, use option 8 on menu G946 to activate those triggers.

CALL PGM(JDFOBJ/J98206CV1) to convert the old Database Audit Manager
triggers to the new Database Audit Manager named triggers. If you removed other
triggers as a result of the PRTTRGPGM report or the query report produced by Step
2 of the upgrade, you can reattach those triggers to your files in the production
environment. A9.1 is not coexistent, only add back triggers needed to run A9.1
software.

Update the Library Entries in Software Versions Repository

If you installed source, you need to get the library entries (F9802 file) for the
Software Versions Repository screen updated to reflect your production library
names. Refore to Solution 200784414 for instructions to populate the F9802 file.

Appendix A – Control File Dependencies

Even though you can put the following sets of control files in different libraries, you must keep the files of any particular set together in the same library on your machine. For example, you could put all of your User Security files in one library, and put your DREAM Writer files in another. This helps you avoid problems when you use or upgrade JD Edwards World software.

Control File Sets

User Security

F0092	User Information
F00921	User Display Preferences
F0093	Library List Control
F0094	Library List Master Files
F00944	Library List Master File – Additional Libraries

DREAM Writer

F98301	DREAM Writer Master Parameter
F98302	DREAM Writer Processing Options (Language Preference)
F98303	DREAM Writer Version Headings (Language Preference)
F9831	DREAM Writer Values Parameter
F98311	DREAM Writer Headings File
F98312	DREAM Writer Printer Overrides
F81900	DREAM Writer Performance Statistics Master
F81901	DREAM Writer Statistics Detail
F81902	DREAM Writer Statistics Detail Accumulator

Data Dictionary

If you are currently at release A7.3:

F9200	Data Item Master
F9201	Data Field Specs
F9202	Data Field Display Text

F9203	Data Item Alpha Descriptions
F9204	Data Item Aliases
F9205	Data Dictionary - Error Message Program ID
F9206	Alternate User Defined Codes Tag File
F9816	Data Dictionary Generic Text File
F98163	Data Dictionary Generic Text Key Index File

If you currently are on release A8.1:

F9200	Data Item Master
F9202	Data Field Display Text
F9203	Data Item Alpha Descriptions
F9204	Data Item Aliases
F9207	Data Dictionary - Error Message Information
F9210	Data Dictionary - OneWorld Attributes
F9816	Data Dictionary Generic Text File
F98163	Data Dictionary Generic Text Key Index File

Vocabulary Overrides/Function Keys

F9220	Screen/Report Text Master
F9601	Function Key Translation Master
F9601D	Function Key Definitions - Alternate Language Descriptions
F9611	Function Key Translation Detail
F9620	Cursor Sensitive Control Master
F9621	Cursor Control Format Master Maintenance

User Defined Codes

F0004	User Defined Code Types
F0004D	User Defined Code Types (Alternate Language Descriptions)
F0005	User Defined Codes
F0005D	User Defined Codes (Alternate Language Descriptions)

Software Versions Repository

F9801	Software Versions Repository Master
F98012	SVR Member Category Codes
F98013	SVR Member Parm/Key List

F9802   Software Versions Repository Detail

Generic Message/Rates Files

F0019   Generic Message/Rates Types

F00191   Generic Message Rates

F00192   Generic Message Detail

Menu Files

F0082   Menu Master File

F00821   Menu Selections

F0083   Menu Text Overrides

F009190   Word Search Occurrences Master

F009690   Word Search Master

F009790   Word Search Verbs

Generic Text Files

F0016   Generic Text File

F00161   Generic Text Window Definition File

F00162   Generic Text Key Definition File

F00163   Generic Text Key Index File

F00164   Generic Text Key Index File (120 Character)

Appendix B – LODRUN Command

This appendix explains what functions the LODRUN command performs.

Overview of the LODRUN Command

To install the upgrade planner (JDFINS) and the installation library (JDEINSTAL), you must use the LODRUN command, which is a standard IBM command. It performs the following functions:

- Restores the QINSTAPP program, which contains code that performs the functions listed below.

- Deletes the old JDEINSTAL library and restores the new one. The JDEINSTAL library contains all the programs you need to perform the installation or upgrade. It also includes the application specific instruction (ASI) files.

- Deletes and restores the JDFINS library. This library contains all the files and programs you need to plan the installation, reinstallation or upgrade, including:

  - Upgrade planner files and programs.

  - Installation history files.

  - Upgrade plans (ZJDE-type models) provided by JD Edwards World. You can use these plans as base models for new plans by using the upgrade planner.

  Note: When the LODRUN command deletes and restores JDFINS, the upgrade plans you have created previously will not be affected.

- Creates the JDEINSTAL user profile if it does not exist on your machine.

- Sends a message that tells the installer to sign on as JDEINSTAL.

Appendix C – Upgrade Planner Screens

This appendix describes the upgrade planner screens and their fields.

Plan the Upgrade Screen

This screen lets you add or change an upgrade plan that the installation or upgrade process will use.

```
960099                          PLAN THE UPGRADE

ACTION CODE. . . I

PLAN NAME. . . . ZJDE_ALT
DESCRIPTION. . . ALTERNATE UPGRADE PLAN


      ENTER THE NAME OF A PLAN.


      YOU CAN CHOOSE ONE OF THE FOLLOWING OR COPY THEM
      TO CREATE YOUR OWN PLAN.  NOTE THAT "ZJDE" PLANS
      CANNOT BE CHANGED OR DELETED.

      WE RECOMMEND YOU REVIEW THE FOLLOWING:

                  ZJDE     - SIMPLE PRODUCTION PLAN
                  ZJDE_ALT - ALTERNATE UPGRADE PLAN

                  ** PRESS F5 KEY TO ENTER UPGRADE DATA **


                  F3=EXIT        F24=MORE KEYS
```

To display a list of all available plans, move the cursor to the Plan Name field on the Plan the Upgrade screen, and press Fl. You cannot modify or delete the models (ZJDE-type plans).

The following table explains the fields on this screen.

Field	Explanation
Action Code	Specify the action you want to perform on an upgrade plan. Valid action codes are:
	A Add
	C Change
	D Delete
	I Inquire
Plan Name	Specify the name of an upgrade plan. To add a plan, see the instructions that follow this table. Do not prefix your new plan name with ZJDE or numbers.

Field	Explanation
Description	Specify a description for the plan.

To Add an Upgrade Plan

From the Plan the Upgrade screen, inquire on a ZJDE upgrade plan model provided by JD Edwards World.

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

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

3. In the Description field, enter a description for the new upgrade plan.

4. Inquire on the new upgrade plan.

Libraries for this Plan Screen

This screen lets you define environment information for the upgrade plan. It lets you specify the JD Edwards World libraries to which you want the software restored and the libraries that contain data files you want to convert.

```
96003                        Plan the Upgrade              Screen 1 OF 3
                           Libraries for this plan

Plan Name. . . . . . ZJDE_ALT    TEST (ALTERNATE) PLAN

Specify all libraries for the  plan that contain J.D. Edwards
files and programs.  Exclude IBM libraries such as QGPL and QTEMP.
Specify current software release level and the release to upgrade to.
               Current JDE Release Level. . . .   A73
               New JDE Release Level. . . . . .   A91
               Production LSF Library . . . . .   JDFOBJ
               Install Source Library . . . . .   0    (1=Yes, 0=No)
               Install Object/Data Libraries. .   1

        Lib     Library           Library
        Typ     Name            Description
        COM     ALTCOM       CLIENT'S ALT COMMON LIBRARY
        DTA     ALTDTA       CLIENT'S ALT DATA LIBRARY
        SEC     ALTSEC       CLIENT'S ALT SECURITY LIBRARY
        JDF     JDFDTAALT    JDE DATA LIBRARY    (ALTERNATE)
        OBJ     JDFOBJALT    JDE OBJECT LIBRARY  (ALTERNATE)
        SRC     JDFSRCALT    JDE SOURCE LIBRARY  (ALTERNATE)

    . . . . . Enter=Update/Next Screen . . . F12=Previous Screen . . . F24=Move Keys . . . .
```

The following table explains the fields on this screen.

Field	Explanation
Current JD Edwards World Release Level	Specify the current JD Edwards World software release level of the environment you want to upgrade. Note: Do not type more than three characters in this field.
New JD Edwards World Release Level	Specify the JD Edwards World software release level to which you want to upgrade your environment (for example, A91).
Production LSF Library	Specify the Production Object library name containing the F99LSF file.
Install Source Library	Specify whether you want the JD Edwards World source code library (usually JDFSRC) restored. Valid values are: 0 Do not restore the source code library. 1 Restore the source code library.
Install Object/Data Libraries	Specify whether you want the JD Edwards World object and data libraries (usually JDFOBJ and JDFDATA) restored. Valid values are: 0 Do not restore the object and data libraries. 1 Restore the object and data libraries.

Field	Explanation
Lib Typ (Library Type)	Specify the type of library. Valid values are:
	COM Common Library
	CSO Custom Object
	CSS Custom Source
	DTA Client's Data Library
	JDF JD Edwards World Data Library
	KBG CASE Constants Library
	OBJ JD Edwards World Object Library
	SEC Security Library
	SRC JD Edwards World Source Library
	Note: Do not create new library types, which will cause unpredictable results. In addition, do not specify more than one library for JDF, OBJ, SEC, and SRC library types.
	Data libraries contain JD Edwards World data files, such as Address Book. The common library holds JD Edwards World control files, such as menu and DREAM Writer files.
Library Name	Specify the name of a library for this environment.
	Note: If you are setting up your own upgrade plans for multiple environments that have separate object libraries, each environment plan must have separate sets of security files (F0092, F0093, F0094, and F0095). JD Edwards World recommends you set up SEC-type libraries (security libraries) for these files.
	Note: If a library you specify in this field does not exist on your machine, the Create Plan Library screen appears after you press Enter from the Libraries for This Plan screen. An example of the Create Plan Library screen follows this table. This screen lets you verify the library name that appears on the Libraries for This Plan screen, but does not exist on your machine. Press Enter to create the library, or press F3 to exit without creating it. If the library name is not correct, enter a new name. The library name on the Libraries for This Plan screen will be updated automatically.

Field	Explanation
Library Description	Specify a description for each library. For example, you could describe JDFDATA as JD Edwards World Data Library.

Merge Information Screen

The Merge Information screen lets you specify the modes in which the merges will run and indicate the library locations for the files to be merged.

> **Note:** JD Edwards World recommends you do not change the default merge modes whether you are installing to new environments or upgrading existing ones.

The upgrade planner fills the Library Name fields with the default library names from the Libraries for This Plan screen. Be sure the library names represent the locations of the files and also appear on the Libraries for This Plan screen.

```
96001E                          Plan the Upgrade              Screen 2 Of 3
                                Merge Information

Plan Name  . . . . .  ZJDE_ALT     TEST (ALTERNATE) PLAN

Specify Merge Modes And Library Names.

0=No Merge, 2=Final, 3=Replace                              Library Name
                           0/2/3
Data Dictionary Merge. . . . .  2   Data Dictionary. . . . . .  ALTCOM
Vocab. Overrides Merge . . . .  2   Vocabulary Overrides . . .  ALTCOM
Dream Writer Merge . . . . . .  2   Dream Writer . . . . . . .  ALTCOM
Menu Master Merge. . . . . . .  2   Menu Master. . . . . . . .  ALTCOM
User Defined Codes Merge . . .  2   User Defined Codes . . . .  ALTCOM
Generic Message/Rates Merge. .  2   Generic Message/Rates. . .  ALTDTA
Help Master Merge. . . . . . .  3   Help Master. . . . . . . .  ALTCOM
Software Repository Merge. . .  2   Software Repository. . . .  ALTCOM
Generic Text Keys Merge. . . .  2   Gen. Text Applic. Key Files ALTCOM
Auto Acct Instructions Merge .  2   Auto Acct Instructions . .  ALTDTA
Next Numbers Merge . . . . . .  2   Next Numbers . . . . . . .  ALTCOM


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

The following table explains the fields on this screen.

Field	Explanation
Data Dictionary Merge	Specify the mode in which you want the merge to run.
	In final mode, the merge adds new data items and updates fields in your existing data items, some of which are based on your values on the Data Dictionary field ownership screen of your upgrade plan. Display decimals are not changed. The merge also produces a report that lists updates made to your data items.
	0 Do not run the merge (No Merge).
	2 Run the merge and generate the reports (Final).
	3 Run the language upgrade (Replace).
	This is valid for language upgrades only. For upgrade, it will run as 2 (Final).
	Note: To update the data dictionary glossary, see *Advanced Options Screen* in this appendix.
Data Dictionary Library Name	Specify the name of the production library that contains your Data Dictionary file (F9200).
Vocab. Overrides Merge	Specify the mode in which you want the merge to run.
	In final mode, the merge adds new vocabulary override fields and records, deletes obsolete VTX fields, and updates text for existing records, but not VTX (video and report soft-coded text) fields that have a Y in the override field. The merge also produces two reports: one that lists updates made to your records and another that lists VTX fields not updated because each has a Y in the override field.
	0 Do not run the merge (No Merge).
	2 Run the merge and generate the reports (Final).
	3 Run the language upgrade (Replace). This is valid for language upgrades only. For upgrades, it will run as 2 (Final).
Vocabulary Overrides Library Name	Specify the name of the production library that contains your Vocabulary Overrides file (F9220).

DREAM Writer Merge

Specify the mode in which you want the merge to run.

In final mode, the merge adds new form IDs and their associated versions, replaces processing option text, adds new ZJDE and XJDE versions, replaces existing XJDE versions, and updates the open query file option fields if your fields are different than those in JDFDATA.

For upgrades, the merge updates data selection, data sequencing, and processing options wherever it is possible, flags some items for your review, and does not produce a report.

0   Do not run the merge (No Merge).

2   Run the merge (Final).

3   Run the language upgrade (Replace). This is valid for language upgrades only. For upgrades, it will run as 2 (Final).

DREAM Writer Library Name

Specify the name of the production library that contains your DREAM Writer file (F98301).

Menu Master Merge

Specify the mode in which you want the merge to run.

For upgrades:

In final mode, the merge adds new menus and lists them on the Menu Additions Report.

The merge also produces an Obsolete Menus report, which lists menus that JD Edwards World has made obsolete. A menu is considered obsolete if it is not delivered in JDFDATA, does not have the naming convention G55XX-G69XX, or is not coded to system 55 through 69. It may produce a Menu Merge Exceptions report, which lists new and obsolete programs and other menu conditions which may need to be reviewed.

Options are removed from menus if the program is obsolete. Options are changed on a menu if there is a replacement program for the menu. The F9806 file controls this.

New menu options are added to existing menus. If a slot is open, the new option is added there. If that selection is taken, then the menu merge starts with selection 24 and works backwards to add new options.

The menu comparison is run as part of Phase 3 to provide the necessary information to complete the manual changes for menus. An option is available with the menu comparison to overlay 'G' menus from JDFDATA.

0   Do not run the merge (No Merge).

2   Update existing menus and generate the reports.

3   For language upgrades, replace all JD Edwards World menus.

Menu Master Library Name

Specify the name of the production library that contains your Menus file (F0082).

User Defined Codes Merge	Specify the mode in which you want the merge to run.
	In final mode, the merge adds new user defined code tables and their values for all system codes, and adds new user defined code values for existing tables located in system codes 84 through 99 and in system code 00, record type IO. It adds selected new values to existing tables. The merge also produces a report that lists updates made to your tables and codes.
	0 Do not run the merge (No Merge).
	2 Run the merge and generate the report (Final).
	3 Run the language upgrade (Replace). This is valid for language upgrades only. For upgrades, it will run as 2 (Final).
	Note: To update the user defined code detail text, see Advanced Options Screen in this appendix.
User Defined Codes Library Name	Specify the name of the production library that contains your User Defined Codes files (F0004 and F0005).
Generic Message/Rates Merge	Specify the mode in which you want the merge to run. The merge operates the same as the user-defined codes merge except that it includes the free form text associated with the rate on the message.
	In final mode, the merge adds new user defined code tables and their values for all system codes, and adds new user defined code values for existing tables located in system codes 80 through 99. It does not add new values for existing tables located in system codes 00 through 79. The merge also produces a report that lists updates made to your tables and codes.
	0 Do not run the merge (No Merge).
	2 Run the merge and generate the report (Final).
Generic Message/Rates Library Name	Specify the name of the production library that contains your Generic Message/Rates files (F0019, F00191, and F00192).

Help Master Merge	Specify the mode in which you want the merge to run.
	This merge runs in replace mode only, which replaces changed help text and adds new help text. It does not replace your entire help file. The merge does not produce a report.
	0 Do not run the merge (No Merge).
	3 Run the merge in replace mode (Replace).
Help Master Library Name	Specify the name of the production library that contains your Help file (F98HELP).
Software Repository Merge	Specify the mode in which you want the merge to run.
	0 Do not run the merge (No Merge).
	2 Run the merge and generate the report (Final).
Software Repository Library Name	Specify the name of the production library that contains your Software Versions Repository files (F9801 and F9802).
Generic Text Keys Merge	Specify the mode in which you want the merge to run.
	The merge does not produce a report.
	0 Do not run the merge (No Merge).
	2 Run the merge (Final).
Gen. Text Applic. Key Files (Generic Text Application Key Files) Library Name	Specify the name of the library that contains your Generic Text Application Key files (F00161 and F00162). These files contain the key fields that are used on generic text windows (program P0016) to access the generic text. For example, F14 (Memo) on the User Defined Codes screen accesses the User Defined Code Detail window (a generic text window), which displays descriptive text about a specific user defined code. The three key fields displayed at the top of the window are defined in the Generic Text Application Key files. You cannot modify the information in these files.

Auto Acct Instructions (Automatic Accounting Instructions) Merge	Specify the mode in which you want the merge to run.	
	In final mode, the merge adds new automatic accounting instructions (AAIs) with the exception of distribution AAIs. The merge also produces a report that lists the new AAIs.	
	0	Do not run the merge (No Merge).
	2	Run the merge and generate the report (Final).
Auto Acct Instructions (Automatic Accounting Instructions) Library Name	Specify the name of the production library that contains your Automatic Accounting Instructions file (F0012).	
Next Numbers Merge	Specify the mode in which you want the merge to run.	
	In final mode, the merge adds new next numbers (index lines) for existing systems or new systems. The merge also produces a report that lists the new next numbers.	
	0	Do not run the merge (No Merge).
	2	Run the merge and generate the report (Final).
Next Numbers Library Name	Specify the name of the production library that contains your Next Numbers file (F0002).	

Printer Information Screen

This screen lets you override default values for the various printer attributes, such as form length, form type, and lines per inch, for the reports created during the upgrade process.

```
96001D                            PLAN THE UPGRADE
                                PRINTER INFORMATION

PLAN NAME. . . . . . ZJDE_ALT     ALTERNATE UPGRADE PLAN

THE FOLLOWING INFORMATION WILL BE USED TO DETERMINE HOW TO PRINT
THE REPORTS CREATED BY THE UPGRADE PROCESS.

                                       1/0    (1=YES, 0=NO)

OVERRIDE PRINT OPTIONS . . . . . . . .  0
OUTPUT QUEUE . . . . . . . . . . . . .  QPRINT

WIDTH OF FORM. . . . . . . . . . . . .  132
LENGTH OF YOUR FORM. . . . . . . . . .   68
OVERFLOW LINE. . . . . . . . . . . . .   62
CHARACTERS PER INCH. . . . . . . . . .  15
LINES PER INCH . . . . . . . . . . . .  8
FORM TYPE. . . . . . . . . . . . . . .  *STD
NUMBER OF COPIES . . . . . . . . . . .    1


          F12 OR ENTER=PREVIOUS SCREEN              F24=MORE KEYS
```

The following table explains the fields on this screen.

Field	Explanation
Override Print Options	Specify whether you want to override the default values for the printer file attributes, which determine how reports are printed. Valid values are: 0 Do not override printer file information. 1 Override printer file information.
Output Queue	Specify the name of the output queue to which you want reports sent. If the output queue does not exist, you must create it. Typically, the output queue is QPRINT. If no printer is assigned to the user's terminal, the default output queue will be used.
Width of Form	Specify the width of the form you will use to print reports. You must enter this value as the number of print positions per line in the range 1 to 378.
Length of Your Form	Specify the length of the form you will use to print reports. You must enter this value as the number of lines per page in the range 1 to 255.
Overflow Line	Specify when overflow to a new page should occur. Overflow occurs when the line you specify becomes the current line number, regardless of whether printing occurs on that line. You must enter this value as the number of lines per page in the range 1 to 255.

Field	Explanation
Characters per Inch	Specify the horizontal printing density of characters you want to use for reports. You must enter this value as characters per inch, and it must be supported by your printer.
Lines per Inch	Specify the line spacing you want to use for reports. You must enter this value as lines per inch, and it must be supported by your printer. Valid values are:
	4 IBM 5219, 5224, 5225, and 3287 printers only.
	6 IBM 5224 printer only.
	8 IBM 5224 printer only.
	9 IBM 5224 printer only.
Form Type	Specify the type of form you want to use for reports. You must enter a value that is supported by your printer. Valid values are:
	*STD The standard printer form used by your printer.
	Name The name of a special form type defined for your printer.
Number of Copies	Specify the number of copies you want printed for reports.

Advanced Options Screen

This screen lets you control several advanced upgrade functions, including:

- Hold on print queue option
- Control file conversion
- Data dictionary glossary update
- User defined codes detail text update
- Obsolete menus deletion

You can also indicate whether the environment you are upgrading is double byte.

> **Note:** You may not need to change the values on this screen. Review the values to make sure the selections are appropriate for your upgrade plan.

```
96001A                           PLAN THE UPGRADE
                                 ADVANCED OPTIONS

PLAN NAME. . . . . .  ZJDE_ALT    ALTERNATE UPGRADE PLAN

THE FOLLOWING INFORMATION WILL BE USED TO DETERMINE THE JOBS THAT WILL RUN.

                                      1/0     (1=YES, 0=NO)

HOLD ON PRINT QUEUE. . . . . . . . . .  0

RUN CONTROL FILE CONVERSION. . . . . .  1
UPDATE DATA DICTIONARY GLOSSARY. . . .  1
USER DEFINED CODES DETAIL TEXT UPDATE.  1
DELETE OBSOLETE MENUS. . . . . . . . .  0


DOUBLE BYTE ENVIRONMENT. . . . . . . .  0
   CONVERT DATA TO UPPER CASE . . . . .  0   <=LIBRARIES JDFINS AND JDEINSTAL
                                             WILL BE CONVERTED IMMEDIATELY.
                                             COULD TAKE UP TO 20 MINUTES.


        F12 OR ENTER=PREVIOUS SCREEN                    F24=MORE KEYS
```
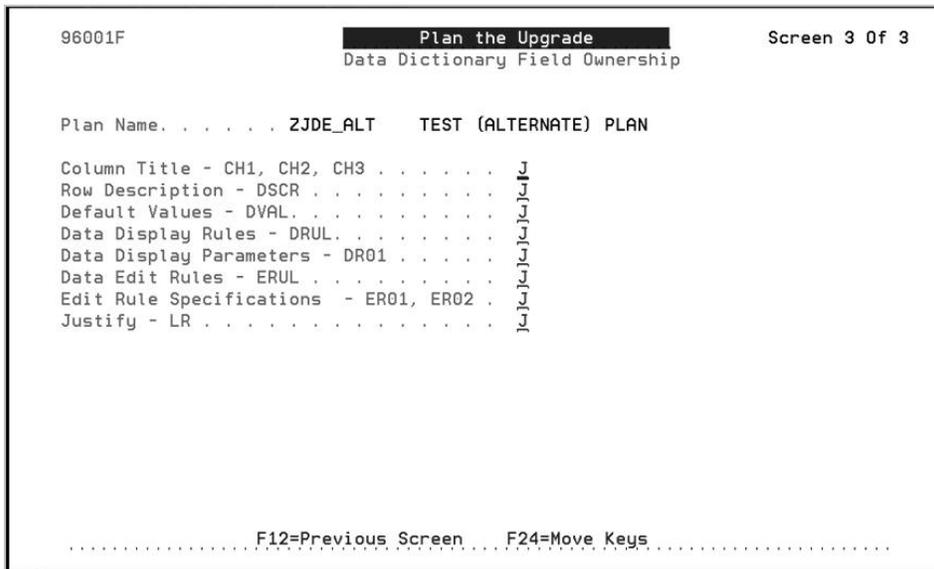
The following table explains the fields on this screen.

Field	Explanation
Hold on Print Queue	Specify whether to hold the print file in the print queue rather than printing it. Valid values are:
	0 Do not hold files on the print queue.
	1 Hold files on the print queue.
Run Control File Conversion	Specify whether control file conversion should run during the upgrade process. Leave this value set to 1 unless you are instructed otherwise. Valid values are:
	0 Do not run control file conversion.
	1 Run control file conversion.
Update Data Dictionary Glossary	Specify whether the data dictionary glossary should be updated during the upgrade process. If you have changed the glossary extensively in the past, you may not want to update it. However, because no report exists to show you the glossary differences between JDFDATA and your environment, no alternative exists to update your glossary. Glossary items cannot be selectively updated. Valid values are:
	0 Do not update the glossary.
	1 Update the glossary.

Field	Explanation
User Defined Codes Detail Text Update	Specify whether the detailed text associated with user-defined codes (F9816 and F98163) should be updated during the upgrade process. Valid values are:
	0 Do not update the detailed text.
	1 Add new detailed text (does not affect existing text).
Delete Obsolete Menus	Specify whether the obsolete menus should be deleted during the upgrade process. Valid values are:
	0 Do not delete obsolete menus.
	1 Delete obsolete menus.
	Leave this set to '0'
Double Byte Environment	Specify whether the environment you are upgrading is double byte. Valid values are:
	0 Not double-byte environment.
	1 Double-byte environment.
Convert Data to Upper Case	Specify whether you want to convert all display data to uppercase characters for double-byte purposes. Valid values are:
	0 Do not convert data to uppercase characters.
	1 Convert data to uppercase characters.

```
96001F                         Plan the Upgrade              Screen 3 Of 3
                           Data Dictionary Field Ownership


   Plan Name. . . . . . ZJDE_ALT    TEST (ALTERNATE) PLAN

   Column Title - CH1, CH2, CH3 . . . . . . J
   Row Description - DSCR . . . . . . . . . J
   Default Values - DVAL. . . . . . . . . . J
   Data Display Rules - DRUL. . . . . . . . J
   Data Display Parameters - DR01 . . . . . J
   Data Edit Rules - ERUL . . . . . . . . . J
   Edit Rule Specifications  - ER01, ER02 . J
   Justify - LR . . . . . . . . . . . . . . J









                  F12=Previous Screen   F24=Move Keys
```

Field	Explanation	
ALL	J	Override value for field from JDF type library during Data Dictionary merges.
	C	Retain Customer's value during Data Dictionary merges.

Appendix D – File Conversions

There are two types of conversions for A9.1:

- Scheduler Conversions
- Main File Conversions

Scheduler Conversions

There are two reasons for scheduler conversions.

1. Program conversions where the data in the file needs to be manipulated.

2. Data files that must convert first because the file is used in another conversion later in the process. A schedule is set up and delivered in the JDEINSTAL library that determines the order in which scheduler conversions run.

Scheduler Types

There are four types of scheduler conversions:

1. Control File Conversions (CTF) are for files that are the technical foundation of JD Edwards World software such as Data Dictionary and Menus. These conversions occur first in the process as other conversions and the control file merges are dependent on the files already being converted.

2. Application Control File Conversions (ACF) are for files considered application control files such as Company Constants (F0010). Some other application conversion programs (BIG, LTL) are dependent on these files already being converted.

3. Large File Conversions (BIG) are for master and transaction files that contain large volumes of data. An example is the General Ledger File (F0911). Most of the large file conversions have been converted to SQL which considerably reduces the conversion time.

4. Small File Conversions (LTL) are for secondary data files where the files generally contain small amounts of data.

Main Conversions

Main conversions are run for files where one of the following has changed and there is no scheduler record for the file:

- record format

- file keys

- select/omit criteria

These files do not require special processing of data, have no dependency on other files. Physical files, logical files that have key or select/omit criteria changes and join logical files with changes can run through the main conversion process.

Main file conversions use CHGPF which is considerably faster than CPYF which was used in previous upgrades.

As a default, the main conversions run as single threaded jobs. Batch job performance of file conversions is not an issue for most customers. However, if many of your files have millions of records, the following information may help you fine tune the main conversion process.

Many articles, etc. have been written through the years about machine tuning to optimize batch performance and throughput. Experts and distinguished IBM engineers, such as Rick Turner and Dick Bains, and folks in the IBM Teraplex Center make careers from just this one topic. The articles, discussions, and range of performance monitoring tools are aimed at data collection, analysis, and reconfiguring machine resources to optimize batch performance for repeatable jobs on a specific machine configuration. A software upgrade (control file merges and database conversions) presents a different perspective to the performance discussion because it is a one time job, expected to run across the full range of machine models, configurations, and over databases ranging from minimal in size, to those that exceed terabytes.

Within that context, every plausible question regarding performance factors of an upgrade can be answered with – it depends. This paper explains the subsystem definition, job queues, and methodology of file conversion execution, and one adjustable factor you can make determined by a couple observations.

JDEINSTAL Subsystem

The JDEINSTAL library contains the work management components, subsystem, job queues, job descriptions, etc. used by the batch drivers, and individual file conversion drivers during an upgrade. The definition and activity levels of the components are depicted here.

JDEINSTAL Subsystem

Maximum Active Jobs in subsystem – 20

Storage Pool ID:1

Storage Size: *BASE

JdeMonitor Job

Step-1/2 Drivers MaxAct-1 Each Step-2 job loads up the file conversion job queues.	"Big" File Conversions MaxAct-1	"Little" File Conversions MaxAct-3	"Main" File Conversions MaxAct-1	Logical File Conversions MaxAct-6	Join File Conversions MaxAct-3
JDEINSTAL	JDEBIGQ	JDELTLQ	JDEFILCNV	JDECRTLF	JDECRTJLF
Step-1 Job	BigFile1	LtlFile1	MainFile1	LglFile1	JoinFile1
Step-2 Job	BigFile2	LtlFile2	MainFile2	LglFile2	JoinFile2
Step-2 Job	BigFile3	LtlFile3	MainFile3	LglFile3	JoinFile3
	END_BIGS	LtlFile4	MainFile4	LglFile4	JoinFile4
	BigFile1	END_LTLS	MainFile5	LglFile5	END_JOINS
	BigFile2	LtlFile1	MainFile6	LglFile6	JoinFile1
	BigFile3	LtlFile2	END_MAINS	LglFile7	JoinFile2
	END_BIGS	LtlFile3	MainFile1	LglFile8	JoinFile3
		LtlFile4	MainFile2		JoinFile4
		END_LTLS	MainFile3		END_JOINS
			MainFile4		
			MainFile5		
			MainFile6		
			END_MAINS		

The maximum activity level for the subsystem is 20 jobs. The subsystem contains six job queues. The JDEMONITOR job is always running throughout the upgrade process and is submitted through the JDEINSTAL job queue. It is the message dispatcher for various parts of the Step-1 and Step-2 batch jobs, as well as the message handler for all the various file conversion drivers, and also updates the final conversion status for each spawned conversion job. It is not a controller or sequencer, but only a message dispatcher.

JDEINSTAL Job Queues

The JDEINSTAL job queue is also where the Step-1 and Step-2 drivers are submitted. The other job queues run the file conversions.

File Conversion Job Queues

Job queues JDEBIGQ, JDELTLQ, and JDEFILCNV are referred to as the "data pumps" – they convert the physical structure of the physical files. JDEBIGQ and JDELTLQ run scheduler conversion jobs which normally manipulate the files data as part of the file conversion process. Job queue JDEFILCNV is where physical files are converted that require no additional data manipulation or processing.

Job queue JDECRTLF rebuilds any changed logical files (indexes) after the physical file has been processed, and job queue JDECRTJLF is held until the data pump queues have completed all conversions for the current Step-2 job. The END_xxxx are the final jobs in the data pump queues and when all three indicate completion, the JDECRTJLF job queue is released. Join logical file rebuilds begin and when its END_xxxx comes active, holds the job queue. This provides the needed boundary control for multi-plan upgrades. It also performs a look ahead at the next plan to determine if all three data pumps have completed or not. If not, the queue is held, is the next Step-2 job has completed all physical file conversions, the JDECRTJLF continues processing join rebuilds for the next environment.

The JDEFILCNV job queue can be increased to run multiple conversions simultaneously depending upon available system resources.

The rule of thumb is one for each CPU, or until disk utilization and activity levels are achieved as described below.

Disk Utilization – Work With Disk Status

The data pumps use little CPU as file conversions, while using system memory, are mostly I/O intensive. The command WRKDSKSTS shows statistics on disk activity. Observe the "%busy" column. Maximum disk arm utilization is achieved around 40%. The recommendation is to achieve a level close to 30% over an elapsed time of around 30 seconds. Use F10 to restart the statistics use F5 to refresh the display until you reach an elapsed time of 30 seconds.

```
                         Work with Disk Status                    JDED
                                                       04/12/07  20:01:02
    Elapsed time:    07:59:40

              Size     %    I/O    Request    Read   Write    Read   Write     %
   Unit  Type   (M)   Used   Rqs   Size (K)    Rqs    Rqs     (K)     (K)    Busy
      1  4327  70564  51.7   2.4     29.4      1.5     .9     41.3    9.7      0
     16  4327  61744  51.7   3.5     22.1      1.3    2.1     47.0    5.9      0
     17  4327  61744  51.7   2.0     36.9      1.1     .8     58.1    9.1      0
     18  4327  61744  51.7   2.4     30.7      1.2    1.1     51.9    7.3      0
     19  4327  61744  51.7   2.0     34.3      1.2     .8     50.5    9.7      0
     20  4327  52923  51.7   2.0     32.2       .9    1.0     57.6    7.6      0
     21  4327  52923  51.7   1.7     35.7      1.0     .7     56.0    8.4      0
     22  4327  61744  51.7   2.0     35.9      1.1     .8     56.6    9.1      0
     23  4327  70564  51.7   3.7     23.4      1.4    2.2     50.0    5.8      0
     24  4327  70564  51.7   2.5     33.5      1.4    1.0     50.7    8.5      0
     25  4327  61744  51.7   2.0     37.1      1.2     .7     55.4    8.0      0
     26  4327  61744  51.7   2.0     36.0      1.1     .8     55.5    8.8      0
     27  4327  52923  51.7   1.6     36.9       .9     .7     57.1    8.7      0
                                                                        More...

   Command
   ===>
   F3=Exit    F5=Refresh    F12=Cancel    F24=More keys
```

Note: This display is just representation of the Disk Status Panel and is not a representative example of actual system activity.

If the %busy column is low, you can increase the activity level of the "MAIN" conversion job queue and allowing more conversion jobs to run. Use the following command to do so:

CHGJOBQE SBSD(JDFINS/JDEINSTAL) JOBQ(JDFINS/JDEFILCNV)

MAXACT(2)

Increasing the activity level for the job queue will allow additional conversion jobs to run simultaneously. Increment in small graduations, and continue checking the disk activity as stated above.

It important to note that the maximum active jobs allowed in the subsystem is configured at 20. This translates into a maximum activity level for job queue JDEFILCNV to 8, after all Step-2 jobs have completed. (job queue JDEINSTAL is empty).

CPU Utilization – Work With System Status

The command WRKSYSSTS shows a range of statistical information on CPU utilization, DASD, memory pool sizes, system activity and page faults. If you are knowledgeable, and comfortable with machine tuning you can adjust memory storage pool sizes and allocate more memory to *BASE.

```
                        Work with System Status                      JDED
                                                        04/12/07  20:01:18
% CPU used . . . . . . . . :          2.0     Auxiliary storage:
% DB capability . . . . :              .6        System ASP . . . . . . :       1834 G
Elapsed time . . . . . . :        08:01:59       % system ASP used  . . :     51.7252
Jobs in system . . . . . :          3257         Total  . . . . . . . . :       1834 G
% perm addresses . . . . :          .036         Current unprotect used :       7247 M
% temp addresses . . . . :          .456         Maximum unprotect  . . :       8230 M


Type changes (if allowed), press Enter.


System     Pool     Reserved     Max
 Pool    Size (M)  Size (M)   Active  Pool          Subsystem    Library
    1       960.78    169.44   +++++  *MACHINE
    2      3282.13      1.56     128  *BASE
    3      1863.39     <.01      73   *INTERACT
    4       197.57      .26      22   *SHRPOOL1
    5        63.67      .00      22   *SPOOL
                                                                    Bottom
Command
===>
F3=Exit    F4=Prompt   F5=Refresh   F9=Retrieve   F10=Restart   F12=Cancel
F19=Extended system status        F24=More keys
```

Remember that four conversion "programs" could be active at any point in time, one from job queue JDEBIGQ and three from job queue JDELTLQ. All remaining activity will be system commands (CHGPF/CPYF) and index rebuilds (CRTLF). Although each CHGPF/CPYF and index build job has a driver program, the resources of those drivers are minimal - as is the overhead of the JDEMONITOR itself.

Summary

In summary, when migrating large amounts of data, the bottleneck will be disk speed and utilization. So throwing more memory at the process may result in little if any gain at all, unless your batch pools are already undersized.

Performance tuning is an art geared toward maximizing job throughput on a machine with fixed, known resources. The upgrade batch jobs must run on all iSeries models comprised of unlimited variations of memory, DASD, etc. and resource allocations. Therefore, the assumptions and configurations we make are conservative.

Appendix E – Create or Modify a User Profile

This appendix explains how to do the following:

- Create a new user profile to access the alternate environment
- Change an existing user profile to access the alternate environment
- Change the JD Edwards World user profile to access the alternate libraries
- Create a new user profile to access the partially-upgraded production environment

For the first three procedures above, you must create the alternate environment before performing them. You must perform the last procedure above in order to complete Phase Three and Phase Four when you upgrade the production environment (not the alternate).

Create a User Profile to Access the Alternate

1. Sign on as a user who has authority to create user profiles.

2. Create the IBM profile by using the CRTUSRPRF command. JD Edwards World recommends that you use the name CLTALT. Be sure that the following fields have the correct values:

Initial Program to Call	J98INIT
Library	JDFOBJALT
Special Authority	*JOBCTL
Group Profile	JD Edwards World

   You will receive the error message User class & special authorities do not match system supplied values even though the profile was successfully created.

3. Sign on to your production environment.

4. From the Security Officer menu (G94), enter ADDLIBLE ALTSEC (or the alternate environment that contains your F0092 file).

5. From the Security Officer menu (G94), select User Information.

6. Add the user profile you created (CLTALT). Enter a library list that represents the alternate environment. For example, QTEMP JDFOBJALT ALTSEC ALTCOM ALTDTA JDFSRCALT QGPL.

7. Sign off from your production environment.

8. Test the user profile (CLTALT) to be sure you are able to sign on and have the correct library list.

Change a User Profile to Access the Alternate

You can modify an existing profile to access your alternate environment. The existing profile must currently be set up to use J98INITA as the Initial Program to Call.

1. Sign on to your production environment.

2. From the Library List Control menu (G944), enter ADDLIBLE ALTSEC (or the alternate environment library that contains the F0092, F0093, and F0094 files).

3. From the menu, select Library List Revisions and define your alternate library list. For example, QTEMP JDFOBJALT ALTSEC ALTCOM ALTDTA JDFSRCALT QGPL.

4. From the menu, select Sign on List Revisions. Attach the alternate library list you just defined to the user profile that you will use to access the alternate environment.

5. Sign off from your production environment.

6. Sign on as a user with authority to change user profiles.

7. Change the IBM user profile by using the CHGUSRPRF command. Be sure that the following fields have the correct values:

Initial Program to Call	J98INITA
Library	JDFOBJALT
Special Authority	*JOBCTL
Group Profile	JD Edwards World

8. Test the changed user profile to be sure you are able to sign on and access the alternate environment.

Change the JDE User Profile to Access Alternate Libraries

To change the JDE user profile to access the A9.1 JD Edwards World libraries after the alternate is upgraded, perform the following steps.

1. Sign on to your production environment.

2. From the Security Officer menu (G94), enter ADDLIBLE ALTSEC (or the alternate environment library that contains your F0092 file).

3. From the Security Officer menu, select User Information.

4. Inquire on the user profile JDE and change the library list to the alternate JD Edwards World libraries. For example, QTEMP JDFOBJALT JDFDTAALT JDFSRCALT QGPL.

5. If you created the JDFDTAALT empty, you cannot sign on with this profile until after your alternate environment has been upgraded.

Create a User Profile to Access Partially Upgraded Production

1. Sign on as a user who has authority to create user profiles.

2. Create the IBM profile by using the CRTUSRPRF command. JD Edwards World recommends that you use the name CLTPROD. Be sure that the following fields have the correct values:

Initial Program to Call	J98INIT
Library	JDFOBJALT
Special Authority	*JOBCTL
Group Profile	JD Edwards World

You will receive the error message User class & special authorities do not match system supplied values even though the profile was successfully created.

3. Sign on to your alternate environment.

4. From the Security Officer menu (G94), select User Information.

5. Add the user profile you created (CLTPROD). Be sure that the library list includes the alternate object and security libraries, and the converted common and data libraries for production. For example:
QTEMP JDFOBJALT ALTSEC *cltcom* *dtdta* QGPL
where *cltcom* is the name of the common library in your production environment and *cltdta* is the name of your production data library.

6. Test the user profile (CLTPROD) to be sure you are able to sign on and have the correct library list.

Appendix F - Change Decimal Character

These checklist items show what you must do to change the decimal character used in the Category Table of Contents to a comma character.

Note: The user signon you use for the following procedure must have command entry authority.

Change the decimal character for the Category Table of Contents.

1. In the Selection field at the bottom of your screen, enter DSPSYSVAL QDECFMT. This displays your system's decimal format. If your format is 2, 3, I, or J, your system uses a comma for the decimal character.

2. After you determine the decimal character your system uses, exit this screen.

3. If your system does not use the comma, skip the following steps.

   Continue to the next checklist item.

4. From the Post Upgrade Menu (G97R4), select Control File Updates.

5. From the Control File Updates menu, select Data Dictionary Items.

   The Data Dictionary Items screen appears.

6. In the Data Item field, inquire on HELP100A.

   The Data Item Glossary Revisions screen appears.

7. In the Action Code field, type C.

8. In the series of numbers displayed as 1.1, 1.2, 1.3, and so on, replace the decimal point (.) with a comma (,). Return to where you left off in Phase Four.

Appendix G - Upgrade Planning Checklist

Use this checklist as a guide while planning your upgrade to A9.1.

This document is not all inclusive and is to be used as a supplemental document.

Evaluate		
Use these resources to evaluate your upgrade opportunity.		
The following documents can be found on the JD Edwards World Upgrade Resource page on Customer Connection under 'Evaluate'. http://www.peoplesoft.com/corp/en/iou/upgrade/world_upgrd_resources.jsp		
Task	√	Date
Review A9.1 Release Notes		
Review A9.1 Net Change Guide		
Recorded Transfer of Information (TOI) sessions for A9.1. Half hour + webcasts on A9.1 Overview and Enhancements. http://ilearning.oracle.com/ilearn/en/learner/jsp/category.jsp?categoryid=20448		

Power Point Presentations:
  ✓ JDE Service Oriented Architecture
  ✓ A Proven Past, Solid Future
  ✓ Preparing a Business Case for Upgrading Your World System
  ✓ Upgrade Workshop Materials		

Best Practices Upgrade white paper contains recommendations for your upgrade based on experiences from other customers, our Partners, Oracle consultants and support staff. http://www.peoplesoft.com/media/cupa/pdf/worldupgrade_bestpractices.pdf		

Plan		
Use these resources to plan your upgrade.		
The following documents can be found on the JD Edwards World Upgrade Resource page on Customer Connection under 'Plan'. http://www.peoplesoft.com/corp/en/iou/upgrade/world_upgrd_resources.jsp		
Task	√	Date
If you are not downloading the software from the e-delivery web site. . . **Order DVD's from Oracle Customer Care**		
Contact any third party software companies you use to certify that their software works with Oracle/JD Edwards World A9.1. Oracle/JD Edwards World is not responsible for any Third party software the client may be using.		
Documents:		
Minimum Technical Requirements for A9.1		
IBM Sizing Questionnaire		
Upgrade Tools:		
Report Manager – The Report Manager tool will assist in managing DREAM Writer, World Writer, FASTR and Star reports. Reports can be searched by last execution date, the user who created the reports, the version name and system code on an easy to use workbench. The reports can be archived, kept or deleted. Before using the Report Manager, download the fix which will update the last executed date for reports called from a menu, SLEEPER or another program.		
Assessment Report Program – Assessing and retrofitting custom code has been identified by our customers as the number one challenge in the upgrade process. Oracle and Aldon have teamed together to provide an Assessment Report Program which compares your current base source, your current customizations, and the new base source. Through this comparison, a detailed audit report for each source member is produced identifying changes and highlighting conflicts. A Global statistics report is produced which provides an excellent summary to help predict the scope of effort required for the upgrade. The Aldon tool can be used now to help identify the custom code that is currently on your system.		
Data Analyzer for Purge/Archive – Typical World installations collect a large volume of data. In an upgrade to a new version of software, all of the data currently in production will need to be converted. We have partnered with the company DCSoftware to provide a tool to assist customers in determining the need for purging data before the upgrade. The report provides a picture of the environment displaying size of files and libraries, record counts by year in various transaction files and F0911 records by batch type		

Plan		
Task	√	Date
Upgrade Tools continued:		
Net Change Analyzer – Realizing what has changed in a release is important for retrofitting code, testing and training. The Net Change Analyzer is a 'one-stop-shop' to see the changes in the new release. Utilizing a workbench, the tool will compare the new release with your current environment and reports on changes for processing options, data dictionary items, programs, SARs, menus, and UDCs and files. The tool is delivered with A9.1 control files. The tool can also be used to compare any two environments.		

Plan		
General **Questions**	Answer	Date
JD Edwards World Cumulative Upgrade:	A9.1	
Installed JD Edwards World Release and Cumulative Level:		
Suites installed: (include printout of F99LSF file)		
Name of Library with F99LSF file (Production JDF object library)		
Coexistent with EnterpriseOne Release:		
Have you ever been Coexistent or installed EnterpriseOne: If yes, see EnterpriseOne SQL Files on next page.		
Do you use a comma for the decimal character?		
Do you have custom menus? Did you use the recommended JD Edwards naming convention? Menu names begin with G55-G59 or Product code is 55.		
Do you use menu masking?		
Do you have triggers attached to files using Data Base Audit Manager? If yes, see Database Audit Manager and other triggers on next page.		
Do you have any languages installed? If so, which one(s).		

Plan con't		
Application/Technical Considerations from A9.1 Upgrade Guide		
Task	√	Date
Software Download Utilities:		
Report Duplicate Records - This utility assists in identifying duplicate sales lines at an open status in the Sales Order (F4211) file. If you are using localization, it also identifies duplicates in the F4301 file when using the F76431 file. Duplicates must be cleaned up before you set up your alternate data library for the A9.1 upgrade.		
OneWorld Files If you are currently on release A7.3 or A8.1, this utility assists you in determining if you have OneWorld formatted files in your data library. The OneWorld formatted files must be deleted before setting up an alternate data library for the A9.1 upgrade.		
Application Considerations:		
Run Integrity Reports Run all standard integrity reports to ensure that critical files are in balance before starting the upgrade.		
Payroll A7.3 Customers: For release A9.1, for customers upgrading from A7.3, the upgrade process moves all user-defined codes and data dictionary items associated with the previous Payroll system (06) to the Enhanced Payroll system (07). Review the customized User Defined Codes and Data Dictionary items as they will also be moved to system code 07. Some A7.3 customers will have entries for User Defined Code tables 07/BC, 07/SC, 07/SG and/or 07/WP although they are not used by any programs. These entries need to be deleted in order for the User Defined Code conversion for system 06 to system 07 to bring over the values in 06/BC, 06/SC, 06/SG and 06/WP correctly. If you have an entries for User Defined Codes 07/BC, 07/SC, 07/SG or 07/WP you must delete them now. Use option 11 on menu G90 to view User Defined Codes.		
Accounts Payable The F04571, F04572, and F04573 files will be cleared in your data library as part of the upgrade process. If you have open payment groups, you need to use the Undo key to remove payments that cannot be completed before the upgrade.		
Manufacturing – A7.3 Customers Rate Schedules will not be converted during the A9.1 upgrade. Rate Schedule files and programs changed significantly between A7.3 and A8.1/A9.1. Rate Schedules were replaced with Repetitive Schedules which use the same menu, G3115. PRIOR to the upgrade, close all open Rate Schedules in A7.3. Open new Repetitive Schedules in A9.1. Refer to Solution 200782881 on Customer Connection.		

Plan con't.		
Task	√	Date

Application Considerations con't.		
Contract Billing and Service Billing All Invoice Generation and Journal Generation processes should be completed before starting the upgrade process. By completing these processes the F48910 and F48911 work files will be empty.		
Database Audit Manager and Other Triggers If you have used Database Audit Manager to attach triggers to files in your production environment, you must deactivate the triggers in your production environment (menu G946 option 7) before you save the copy of the production data libraries which you will restore in Phase Two to set up the alternate environment. After the production data libraries are saved you can activate the Database Audit Manager triggers in the production environment again (menu G946 option 8). For other triggers you removed, use the report produced from the DSPFD command and use ADDPFTRG or whatever method you use to add the triggers back to the production files. If you have triggers attached to other files, they must also be removed before saving the production libraries. Step 2 of the upgrade process will halt if triggers are attached to files and you will need to remove the triggers in the alternate environment before continuing with file conversion.		
Check for DDM files DDM files cannot exist in the data libraries in the test or production environments for the upgrade to run successfully. Use the WRKDDMF command to check for DDM files. IF any exist, delete them using the DLTF command.		
More decisions		
A9.1 DVD Software has arrived from Oracle.		
A9.1 downloaded from e-delivery web site. **http://edelivery.oracle.com/** When using the FTP utility to transfer software to your Systemi, you could encounter a time out issue. See Appendix C of the JD Edwards World Quick Installation Guide for tips prior to launching the FTP process.		
Web Enablement: Will you be implementing Web Enablement? **Do you currently use JWALK or World Vision?**		
Dual Control File Maintenance: Control files should be maintained in both the test and live environments during the testing/proof period. Failure to perform this dual maintenance will result in a longer go-live process by 12 to 24 work hours, minimum. Control files are considered to be the following files; The AAIs, Menus, Data Dictionary, Dream Writers, UDCs, Vocabulary Overrides, World Writers, Fixed Assets, (F12603 thru F12609) and FASTR F8303 thru F8309. These associated files can be copied back into the live environment, if dual maintenance is done.		
Ensure that all libraries to be updated by this upgrade are backed up and 'recoverable' immediately prior to starting the upgrade process		

Plan con't.		
Questions concerning ASIs	J or C	Date
Data Dictionary Field Ownership Column: Please circle your choice for each field.　　　→		
In A9.1, you have the option of the data dictionary fields indicated below being updated with the JDE default values or you can choose to manually update any or all of the fields. *'J' in the ownership column means that the JDE default will be used.* *'C' in the ownership column means that your value will be retained and you will need to reconcile each data dictionary item.* **To review these fields go to menu G90 option 4.**		
Column Title – CH1. CH2, CH3	J = JDE C = Client	
Row Description – DSCR2	J = JDE C = Client	
Default Value - DVAL	J = JDE C = Client	
Data Display Rules - DRUL	J = JDE C = Client	
Data Display Parameters – DR01	J = JDE C = Client	
Data Edit Rules - ERUL	J = JDE C = Client	
Edit Rule Specifications – ER01, ER02	J = JDE C = Client	
Justify - LR	J = JDE C = Client	

Plan con't.		
Questions concerning Special Jobs	Answer	Date
Financials: 1. Do you have a global credit limit for all clients? In A9.1 a zero in the default value parameter of the A5ACL data dictionary item means no credit. Prior releases it meant unlimited credit. 　　2. Do you use Accounts Receivable drafts?		
Product Data Management: System 30 1. Do you use Percent Billing? 2. Have you turned off the Processing Option that displays the batch quantity, made a change to the routings, and deleted the Unit of Measure?		
Agreement Management: System 38 　　1. Do you use Distribution Contract?		
Advanced Stock Valuation: System 39 　　1. Do you use Item/Pool Valuation?		
Inventory/OP Base: System 40 　　1. Do you use Preference Profiles?		
Inventory Management: System 41 1. Do you use Mixed Lots? 2. Do you use Tank Numbers? 3. Do you use Item/Pool Valuation? 4. Do you use Distribution Contract? 5. Do you use Vehicle Transactions?		
Contract/Service Billing: System 48 　　1. Do you use Contract/Service Billing?		
Load and Delivery: System 49 　　1. Do you use Trip Detail? 　　2. Do you use Vehicle Transaction?		

Execute		
Use these resources to execute your upgrade.		

The following documents can be found on the JD Edwards World Upgrade Resource page on Customer Connection under execute.
http://www.peoplesoft.com/corp/en/iou/upgrade/world_upgrd_resources.jsp

Task	**√**	**Date**
Links to A9.1 Downloads		
A9.1 Web Enablement - This Update contains the software and installation documentation for JD Edwards World A9.1 Web Enablement, a web based user interface.		
A9.1 Service Enablement - This Update is for A9.1 Service Enablement. This Java based service enablement product is a statement of Oracle's continued commitment to the JD Edwards World product family. Service Enablement allows you to integrate your JD Edwards World Software with other software packages through the use of Java based web services.		
JD Edwards World Language Libraries -This document provides information on how to access the current JD Edwards World translations that are available as downloadable updates for releases A9.1, A8.1, and A7.3.		
A9.1 Documentation - This download contains the documentation for JD Edwards World release A9.1. Once downloaded, it allows you to write your own custom documentation.		
A9.1 Sample Test Plans - A number of sample manual test plans have been created for the major A9.1 enhancements and some of the standard World functionality to assist you in testing the new release. These test plans are available on the Update Center as Word documents under 5 categories: Technical Foundations, Manufacturing, Distribution, Financial/Cross Industry and Human Resource Management. They may be used as templates where test steps can be customized to conform to your processes and data requirements.		
Guides:		
Quick Install Guide - Step by step instructions for installing software from Electronic Delivery Site or System i5 DVD.		
Upgrade Guide - Step by step instructions to upgrade from A7.3 or A8.1 to A9.1.		
A9.1 Programmer's Guide - Database and file changes for A9.1.		
A7.3 to A9.1 Programmer's Guide – Database and file changes from A7.3		
A9.1 Documentation Online at Customer Connection – Access the A9.1 World Documentation from Customer Connection. This is a read only document.		
SARs and Objects included in A9.1 Base - Spreadsheet listing SARs and Objects included in release A9.1 Base.		

Appendix H - Production Go-Live Checklist

This Install checklist is inclusive of updates for World release A9.1.

Use the JD Edwards World A9.1 Upgrade Guide to guide you through the checklist.

As each step is performed, place a check mark in the column titled Complete and enter the current date.

Any issues that arise during the install process must be resolved. Some of the checklist items include helpful hints for troubleshooting.

Application/ Technical Considerations

Tasks below must be completed before performing the go-live.

See Application/Technical Considerations in Phase One of the A9.1 Upgrade Guide for details about tasks.

Initial and date confirming that this task has been done. If this task does not apply to your environment, put NA under 'Complete Column' and the date under the 'Date' column.

Task	Complete	Date
Run Integrity Reports		
Payroll – A7.3 Clients		
Accounts Payable		
Manufacturing – A7.3 Customers using Rate Schedules		
Contract Billing and Service Billing		
Sales Orders and Purchase Orders		
OneWorld Files		
Database Audit Manager and other triggers. PRTTRGPGM command will give you all files in a library that have triggers.		
All IBM journaling must be stopped prior to launching the upgrade.		
Check for DDM files		
Was duplicate maintenance done for the control files? If so, which files? Circle Yes or No. Auto Accounting Instructions YES NO Menus YES NO Data Dictionary YES NO DREAM Writer YES NO User Defined Codes YES NO Vocabulary Overrides YES NO World Writers YES NO		

Set up Upgrade Plan and Validate		
Task	Complete	Date
Sign on as JDEINSTAL and select Work with Upgrade Planner.		
Inquire on the Upgrade Plan used for the test Upgrade (i.e. A91Test). Add a new plan name for the GO-Live upgrade, for example: A91LIVE.		
Current JDE Release Level is A73 or A81. New JDE Release Level is A91.		
The LSF library is the **production** object library with the F99LSF file in it. i.e. JDFOBJ		
Install Source and Object = 0. Install Object/Data Libraries = 0.		
Change the library names for the COM, DTA and SEC type libraries to the **production** libraries.		
Leave defaults on merge information screen.		
Data Dictionary Field Ownership should not be changed from the one used in TEST. Refer to report R96004 from the test upgrade.		
Validate upgrade plan using Print Upgrade Validation report option.		
For validation make sure processing options are set correctly: 1= Plan name, i.e. A91LIVE 2= 0; 3= 1 4= *ALT		
Check R97281 report to make sure there are no duplicate files. If there are, they must be resolved.		
Check R96004YR report to make sure error count is zero. If not, resolve errors. Rerun validation until R97281 and R96004YR reports are both clean. Refer to the R96004YR report from your test environment.		
Check R96004 Data Dictionary Ownership Report to confirm the parameters are set as you intended. Refer to the R96004 report from your test environment.		
Verify it is OK to Stop All JD Edwards World Subsystems.		
Verify a backup has been completed & is available on site for the environment to be upgraded.		

Submit REINSTALL, Monitor and Check Joblog		
Task	Complete	Date
Ensure there is no library with the same name as your plan name.		
Verify that no one is working in the environment to be upgraded.		
Clear all messages from JDEINSTAL message queue.		
Sign on as JDEINSTAL and select Change Message to Break Mode option.		
Check reply message list WRKRPYLE for the following messages. RPG8888 must be above RPG0000. CPA32B2 must be above all other CPA32B2 messages. If the messages do not exist, add them. *Message ID Reply Compare Value* RPG8888 D *NONE RPG0000 C *NONE CPA32B2 I *NONE		
Select Start the Upgrade option		

Fill in Start the Upgrade option as follows:
  Upgrade Type   ***ALT**
  Plan Name   *Your plan name*
  Source Media   *DISK
  Current JDE Release Level   A73 or A81
  New JDE Release Level   A91
  Run Validator Program   1
  Hold On Job Queue
 	
Both Upgrade Step 1 and Upgrade Step 2 submit.		

When REINSTALL Step 1 completes check joblog produced. Look for JDE9999, and CPF9999. CPF9999 error is OK when it says file has no members.		

Cont'd Submit of REINSTALL, Monitor and Check Joblog		
Task	Complete	Date
Periodically monitor messages to make sure the install is continuing.		
Verify that when UPG_STEP 2 completes the 'you may now sign on using your JDE User Profile to continue' message appears. (J98FRFGEN submits next.)		
When UPG_ Step 2 completes check the joblog produced. Verify that there are no JDE9999 errors. All JDE9999 issues must be resolved.		
DSPMSG and verify J98FRFGEN completed successfully. If it failed, go to bottom of joblog and scroll back until you see a 'NOTIFICATION' Message. The message indicates which Data Dictionary item is in error.		
Inquire on File Conversion Status. Check on file conversion status that completed abnormally. Resolve any problems. *Appendix D – File Conversions.* Scheduler conversions: ACF, CTF are show stoppers. Resolve issue and rerun the upgrade. BIG, LTL can be converted after step 2 using the single file conversion process. Main File conversions: Uses CHGPF to convert the file. Below is the command to use. Chgpf File(<PrdLib>/<FileName>) SrcFile(JDFSRC/JDESRC) SrcMbr(<FileName>) Option(*NoSrc *NoList *NoEventf) DltDepIf(*Yes) ReUseDlt(*Yes)		

Phase 3 Create New Files and Update Applications		
Task	Complete	Date
Create or Modify a user profile to access partially upgraded environment. *Appendix E – Create or Modify a User Profile.*		
Check to ensure the F00944 file exists in the security library. If it does not exist, copy it from JDFDTAALT to the security library.		
Sign on as a user to the environment that was upgraded .		
Check that the JDEINSTAL monitor is still active.		
Select the Build New Files List from menu G97R4. Be sure the job has completed before continuing to next step.		
Select Create New Files and create files in correct libraries. Press F5 to bring in JDE Defaults.		
Rerun Build New Files List and Create New Files again, if files show up on list. Repeat until New Files List is empty. *Build new files list may have F06126L8 & F06126L9 but cannot create them. They are created when the job that needs them is run. You can ignore these files if they are on the build new file list*		
If dual maintenance was done for control files, skip to 'Copy Control Files'.		
Review the Menu Merge Exception report. Take appropriate action based on notes below. Messages are: New pgm for release = No action required. Program may be obsolete = Must review. *Review Security = Must review. Cannot add sel to menu = Copy menu from JDFDATA. Opt key/vers not found = Copy menu from JDFDATA.		
Review the UDC Merge Report for **Already Exists messages. Compare the UDC tables with this message with your notes on the changes made from the test upgrade.		
If you are not able to copy the AAI files, print the report and send it to the user to make appropriate changes. Run Menu Comparison Report from G97R6. Processing option 1 must be a 1. Processing option 2, if left blank produces a report. If processing option 2 is a 1, it will replace the G Menus. It will not replace G menus that are coded to system 55-69. Menu masking and any custom changes to the G menus will be lost and must be manually re-added.		
Review Menu Comparison report for Menu Masking, if applicable.		
Phase 3 Create New Files and Update Applications		

Task	Complete	Date
Data Dictionary File Workbench: If all fields in the DD Field Ownership screen were set to 'J' skip this section.		
Data Dictionary File Workbench: If any fields in the DD Field Ownership were set to 'C', Review the Data Dictionary Manual Change report and make appropriate changes.		
Print the ASI report from G97R4 menu for A91. Apply the ASIs using the Workbench or from the report.		
If payroll is active, see solution 201047017 on Customer Connection.		
Copy Control files: **Duplicate file maintenance was done.** Copy the following files: Automatic Accounting Instructions: F0012 Menu: F0082, F00821, F0083, F009190, F009690, F9790 Data Dictionary: F9200, F9202, F9203, F9204, F9207, F9210, F9816, F98163 DREAM Writer: F98301, F98302, F98303, F9831, F98311, F98312, F9835, F9836, F98361, F9837 User Defined Codes: F0004, F0004D, F0005, F0005D Vocabulary Overrides: F9220, F9601, F9601D, F9611, F9620, F9621 World Writer: F8201, F82013, F82100, F82101, F82102, F82103, F82104, F82105, F82106, F82107, F82108, F82100E, F82109, F9401 If you use system 12 (Fixed Assets) or system 83 (FASTR), and if you will be copying DREAM Writer files, you must copy the following files also. For system 12 – F12603 through F12609 For system 83 – F8303 through F8309		
Run the ASI report and do the ASIs for files not copied and marked as Special Instructions only.		

Phase 4 Run Special Application Jobs		
Task	Complete	Date
From menu G97R4 – Rebuild Menu Word Search		
Run Special Application Jobs report from G97R4. Choose the option for the release you are upgrading from. Run Special Application Jobs using Special Application Jobs Report. Only do the Special Jobs for systems that are licensed.		
From G97R6 – Rebuild DD/VO		
If decimal character used is a comma, go to Appendix F and follow directions.		
From G97R4 menu choose the option to Work with 'Z' libraries. Confirm there are no files in any of the 'Z' libraries. If there are any files in the Z libraries, resolve the issue. If no files in the libraries, delete the libraries.		
Sign on as JDEINSTAL and Print File Conversion Status Report.		
Review Upgrade Reports.		
Start JDE World Subsystems		
Change JDE World System Values.		
Change the JDE profile.		
Change the JDE IBM profile.		
Rename JDE World production libraries.		
Rename the JDE World Alternate libraries		
Start the JDE World Subsystems		
ENDSBS JDEINSTAL *IMMED		
Sign on to the Live Production Environment		
If triggers were attached prior to the upgrade using Database Audit Manager (DBAM), you will need to run the following command: **CALL PGM(*jdfobj*/J98206CV1)** This program re-attaches the triggers using A9.1 programs with e-signature.		
Activate Triggers – if you had custom triggers on any files, you can activate them now.		
Review the DREAM Writer Versions only if DREAM writer files were not copied.		

Cont'd Phase 4 Run Special Application Jobs		
Task	Complete	Date
Check Hidden selection 25 to make sure the correct release level shows.		
Check Hidden selection 97 to make sure the Install history was updated. If HS 97 not available, display T97300 file from object library and verify the A91 record exists.		
The production environment is now upgraded to A9.1		
Power users can now sign on and verify the data.		

Appendix I - Test Environment Checklist

This Install checklist is inclusive of updates for World release A9.1.

Use the JD Edwards World A9.1 Upgrade Guide to guide you through the checklist. Only perform tasks that are on the checklist.

As each step is performed place a check mark in the column titled Complete and enter the current date.

Any issues that arise during the install process must be resolved. Some of the checklist items include helpful hints for troubleshooting.

> **Pre-upgrade Note:** Refer to the A9.1 Planning Checklist for all Application/Technical Consideration list. Confirm that the considerations that affect the environment being upgraded have been completed prior to creating the alternate environment.

LODRUN		
Note: If the A9.1 software was downloaded from the EDP web site, the LODRUN process was completed via the install shield. Complete the last 5 steps on this page and continue.		
Task	Complete	Date
Verify that DVD is in the drive		
Sign on as QSECOFR or equivalent		
Type LODRUN *device* Device = OPTXX		
Verify LODRUN process completes successfully- must receive message to sign on as JDEINSTAL		
Sign on as JDEINSTAL and DSPDTAARA #TREL- A91must display in the upper left corner.		
Signed on as JDEINSTAL - DSPMSG and Clear (F13)		
WRKLIB JDEINSTAL - put release update name and the date in the description.		
WRKLIB JDFINS - put release update name and date in the description.		
If software was downloaded from EPD site, WRKLIB JDEINSTAL2-put release update name and the date in the description .		

Set up Upgrade Plan and Validate		
Task	Complete	Date
Sign on as JDEINSTAL and select Work with Upgrade Planner		
Upgrade Plan name. For Example: A91TEST.		
Current JDE Release Level is A73 or A81. New JDE Release Level is A91.		
Install Source and Object = 1. If no source is to be Installed, leave as 0. **It is recommended to install Source.**		
The LSF library is production object library with the F99LSF file in it. i.e. JDFOBJ		
Leave defaults on merge information screen.		
Data Dictionary Field Ownership should be changed based on A9.1 Upgrade Planning Checklist.		
Validate upgrade plan using Print Upgrade Validation report option.		
For validation make sure processing options are set correctly: 1= Plan name; 2= 0; 3= 1 4= *REINSTALL		
Check R97281 report to make sure there are no duplicate files. If there are, they must be resolved.		
Check R96004YR report to make sure error count is zero. If not, resolve errors. Rerun validation until R97281 and R96004YR reports have zero (0) errors. Print this report for reference during the GO LIVE.		
Check R96004 Data Dictionary Ownership Report to confirm the parameters are set as you intended. Print this report for reference during the GO LIVE.		

Submit REINSTALL, Monitor and Check Joblog		
Task	Complete	Date
Ensure there is no library with the same name as your plan name.		
Verify that no one is working in the environment to be upgraded.		
Verify that a backup is on site for the environment to be upgraded.		
Verify that there are no triggers on any files in the test environment. See page 9 of Upgrade Guide.		
Check reply message list WRKRPYLE for the following messages. RPG8888 must be above RPG0000. CPA32B2 must be above any other CPA32B2. If messages do not exist, add them. *Message ID Reply Compare Value* RPG8888 D *NONE RPG0000 C *NONE CPA32B2 I *NONE		
Sign on as JDEINSTAL and select Change Message to Break Mode to Break Mode option		
Select Start the Upgrade option.		
Fill in Start the Upgrade option as follows: Upgrade Type *REINSTALL Plan Name *Your plan name* **Source Media Optic Dev or *SAVF** **Current JDE Release Level A73 or A81** New JDE Release Level A91 Run Validator Program *YES JDE PTF Library *NONE Hold Install Job on Job Q 0 PTF Step Option 0 Both Upgrade Step 1 and Upgrade Step 2 submit.		
*Only for DVD - Respond Y to the message –Is the first installation DVD loaded?		
Monitor the message that system 00 has restored. All systems are included in system 00.		
When REINSTALL Step 1 completes, DSPMSG to make sure there were no restore from DVD errors.		
When REINSTALL Step 1 completes check joblog produced. Look for JDE9999, and CPF9999. CPF9999 error is OK when it says 'file has no members'.		

Cont'd Submit of REINSTALL, Monitor and Check Joblog		
Task	Complete	Date
Periodically monitor messages to make sure the install is continuing.		
Verify that when UPG_STEP 2 completes the 'you may now sign on using your JDE User Profile to continue' message appears. (J98FRFGEN submits next.)		
When UPG_ Step 2 completes check joblog produced. . Verify that there are no JDE9999 errors. All JDE9999 issues must be resolved.		
DSPMSG and verify J98FRFGEN completed successfully. If it failed, go to bottom of joblog and scroll back until you see a 'NOTIFICATION' Message. The message indicates which Data Dictionary item is in error.		
Inquire on File Conversion Status. Check on files conversion status that completed abnormally. Resolve any problems. *Appendix D – File Conversions.* Scheduler conversions: ACF, CTF are 'upgrade failure' errors. Resolve issue and rerun the upgrade. BIG, LTL can be converted after step 2 using the single file conversion process. Main File conversions: Uses CHGPF to convert the file. Below is the command to use. Chgpf File(<PrdLib>/<FileName>) SrcFile(JDFSRC/JDESRC) SrcMbr(<FileName>) Option(*NoSrc *NoList *NoEventf) DltDeplf(*Yes) ReUseDlt(*Yes)		

Phase 3 Create New Files and Update Applications

Task	Complete	Date
Change QJDF data area in JDFOBJALT.		
Create or Modify user profile to access environment. *Appendix E – Create or Modify a User Profile.*		
Check to insure the F00944 file exists in the security library. If it does not exist, copy it from JDFDTAALT to the security library.		
Sign on as a user to the environment that was upgraded .		
Go to 7/G97R42 and review activated systems. If you have purchased new systems, activate them now.		
Copy History file from Production to JDFOBJALT.		
Check to be sure the JDEINSTAL monitor is still active.		
Select the Build New Files List from menu G97R4. Be sure the job has completed before continuing to next step.		
Select Create New Files and create files in correct libraries. Press F5 to bring in JDE Defaults.		
Rerun Build New Files List and Create New Files again, if files show up on list. Repeat until New Files List is empty. *Build new files list may have F06126L8 & F06126L9 but cannot create them. They are created when the job that needs them is run. You can ignore these files if they are on the build new file list.*		
Signed on as JDEINSTAL print the Menu Merge Exceptions report(R97883A), UDC Merge Report (R987241) and New AAI Report (R98727).		
Review the Menu Merge Exception report. Take appropriate action based on notes below. Messages are: New pgm for release = No action required. Program may be obsolete = Must Review *Review Security = Must Review. Cannot add sel to menu = Copy menu from JDFDATA. Opt key/vers not found = Copy menu from JDFDATA.		
Review the UDC Merge Report for **Already Exists messages. Compare the UDC tables with this message with the UDC table from production.		

Phase 3 Create New Files and Update Applications cont'd	Complete	Date
Run Menu Comparison Report from G97R6. Processing option 1 must be a 1. Processing option 2 if left blank produces a report. If processing option 2 is a 1, it will replace the G Menus. Menu masking and any custom changes to the G menus will be lost and must be manually added.		
Review Menu Comparison report for Menu Masking setup.		
Data Dictionary File Workbench: If all fields in the DD Field Ownership screen were set to 'J' skip this section.		
Data Dictionary File Workbench: If any fields in the DD Field Ownership were set to 'C', the Manual Change report must be reviewed and appropriate changes made.		
Print the ASI report from G97R4 menu for A91. Apply the ASIs using the Workbench or from the report.		
If payroll is active, see solution 201047017 on Customer Connection.		

Phase 4 Run Special Application Jobs		
Task	Complete	Date
From menu G97R4–run Rebuild Menu Word Search		
Run Special Application Jobs report from G97R4. Choose the option for the release you are upgrading from. Run Special Application Jobs using Special Application Jobs Report. Only do the Special Jobs for systems that are active.		
If triggers were attached using DBAM, you will need to run the following command: **CALL PGM(*jdfobj*/J98206CV1)** This program re-attaches the triggers using A9.1 programs with e-signature.		
Activate Triggers – if you had triggers on any files, you can activate them now.		
From G97R6 – Rebuild DD/VO		
If decimal character used is a comma, go to Appendix F and follow the directions.		
From G97R4 menu choose the option to Work with 'Z' libraries. Confirm there are no files in any of the 'Z' libraries. If there are any files in the Z libraries, resolve the issue. If no files in the 'Z' libraries, delete the libraries.		
Sign on as JDEINSTAL and Print File Conversion Status Report.		
Review Upgrade Reports.		
Check Hidden selection 25 to make sure the correct release level shows.		
Check Hidden selection 97 to make sure the Install history was updated. If HS 97 is not available, display T97300 file from object library and verify the A91 record exists.		
END OF CHECK LIST		
You may now start testing.		