



JD Edwards World

A9.2 Update 1 Upgrade

Guide

Version A9.2 Update 1

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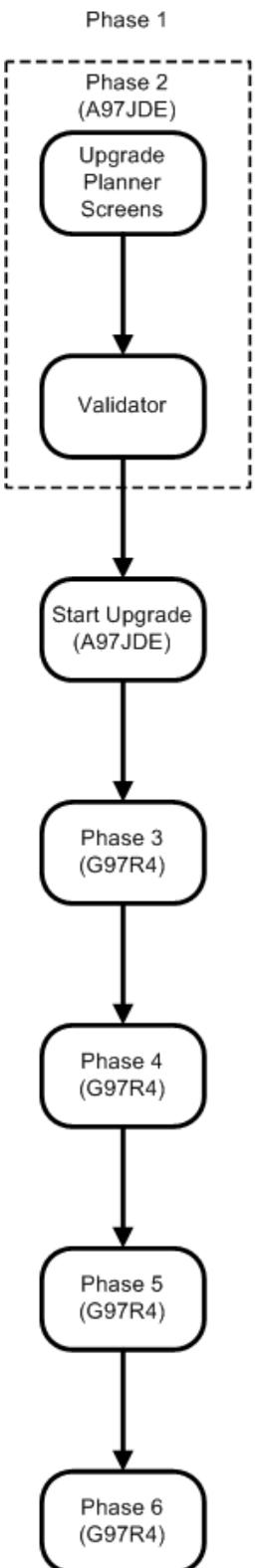
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Phase One - Upgrade Process Overview

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

Process Flow



Process Highlights

- Overview
- Restore data libraries to alternate names
- Issue the LODRUN command
- Planning the Upgrade screen
- Libraries for This Environment screen
- Merge Information screen
- Printer Information screen
- Advanced Options screen
- Data Dictionary Field Ownership screen
- Upgrade Planner Validation Report
- Duplicate Files Found Report
- Data Dictionary Field Ownership Report
- Change Message Break mode
- Start the Upgrade
- Inquire on File Conversion status
- Build new Files List
- Create new Files
- Print menu, Automatic Accounting Instruction (AAI), and User-Defined Code (UDC) Reports
- Update menus, AAIs, and UDCs
- Menu Comparison Report
- Data Dictionary Workbench
- Create ASI Report
- Work with instructions (ASIs)
- Review DREAM Writer Versions Workbench
- Rebuild menu word search
- Run special application status
- Rebuild DD/VO
- Display and delete 'Z' libraries
- Print the File Conversion Status Report
- Test the alternate environment
- Upgrade production environment

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 upgraded JD Edwards World software with copies of your data files. When you are satisfied with the testing, you can then upgrade your production environment.
- Users can be trained in the alternate environment while continuing 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 upgraded software.
- Timings from file conversions in the alternate environment helps 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 Setup

The libraries that exist in the alternate environment before you start the A9.2 Update 1 upgrade are full copies of your A9.2 production libraries. This includes JDFDATA, JDFOBJ, JDFSRC, data, control, and security files libraries. You must restore the libraries from a backup tape.

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. The validation process of the upgrade identifies any remaining duplicate files and produces a report. Any duplicate files on the report need to be cleaned up before initiating the upgrade. Evaluate the number of records in each duplicate file and note that the system updates the first file in the library list before removing a duplicate file.

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 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 three methods below, you need to perform most of the changes only once. If not, you 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 to the alternate environment as well, synchronizing the files in both places. For a list of control files, refer to the *Control File Changes Monitored* chart under *Update Your Applications* in Phase 6 of this guide.

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 Note in the Update your Applications section 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 alternate 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.

Accounts Payable

The F04571, F04572, and F04573 files are 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.

Contract Billing and Service Billing

All Invoice Generation and Journal Generation processes must be completed before starting the upgrade process. After completing these processes, the F48910 and F48911 work files are 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 before you save the copy of the production data libraries which you restore in Phase Two to set up the alternate environment.

Access menu G946 option 4 and verify if any files have the Status *ACTIVE, if yes, then enter a 5 in front of each file listed to turn the trigger off. If you have Option 7 on menu G946, Deactivate All Configurations, you can use this option.

Note: Triggers cannot be turned off or on if the file is locked.

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 halts if triggers are attached to files and you 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.

Phase Two – Planning and Upgrading the Alternate Environment

Overview

For this phase of the upgrade, restore a full set of your A9.2 libraries, download the A9.2 Update 1 software from Oracle's Update Center, or copy the A9.2 Update 1 software files from the DVD+RW media, and then set up an upgrade plan, which defines which data libraries are converting during the upgrade process and the libraries which contains the new A9.2 Update 1 software. After the upgrade plan is set up and validated, initiate the upgrade command.

To set up an alternate environment

1. Use a recent backup tape to restore your A9.2 libraries to another set of libraries. This includes libraries for data files, control files, security files. Also restore a copy of your A9.2 production object, source, and JDFDATA libraries.

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

2. Change the QJDF Data Area in the alternate object library to reflect the alternate library names.
3. Sign on as a User Who Accesses the Alternate Environment to verify the environment is a complete set of libraries.

Either create a new user profile or change an existing user profile to access the alternate environment. See *Appendix D – Create or Modify a User Profile* for detailed information.

4. If you are unable to deactivate the triggers prior to the copy of the production data libraries, complete the following process for Database Audit Manager:
 - Sign into the alternate environment
 - Access menu G946 option 2
 - If there are files listed in the Database Audit Manager Workbench as *ACTIVE, remove the triggers and clear the DBAM files.
 - On the command line, use the IBM command RMVPFTRG for each file in your alternate environment that is listed as *ACTIVE.
 - Clear the Database Audit Manager files located in your alternate environment. Use the CLRPFM for F98201, F98202, F98203, and F98204.

Use this process as well, when you refresh your alternate environment.

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.

IBM Journaling

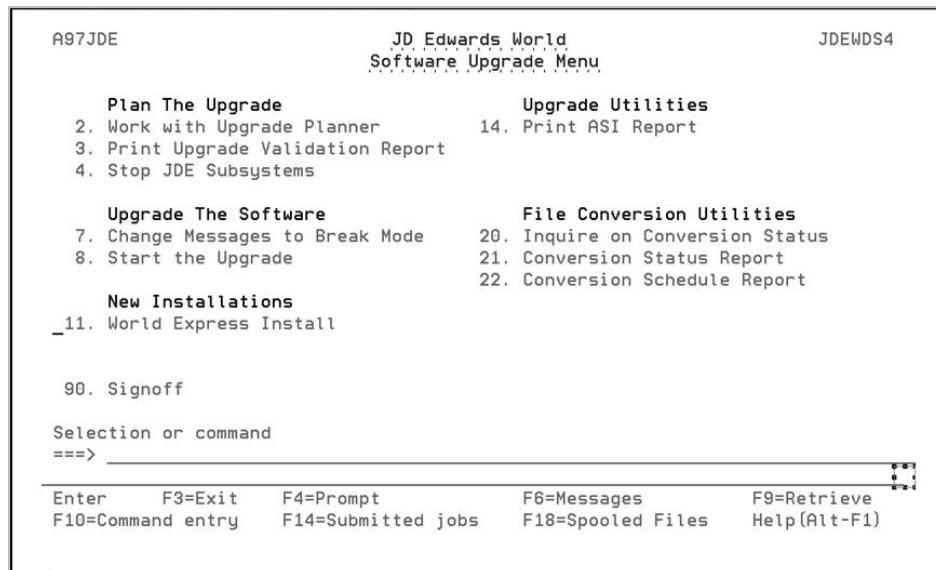
IBM Journaling must be turned off before you start the A9.2 Update 1 upgrade.

Delete Physical File

Use the DLTF command to delete the F76B620 file, if it exists.

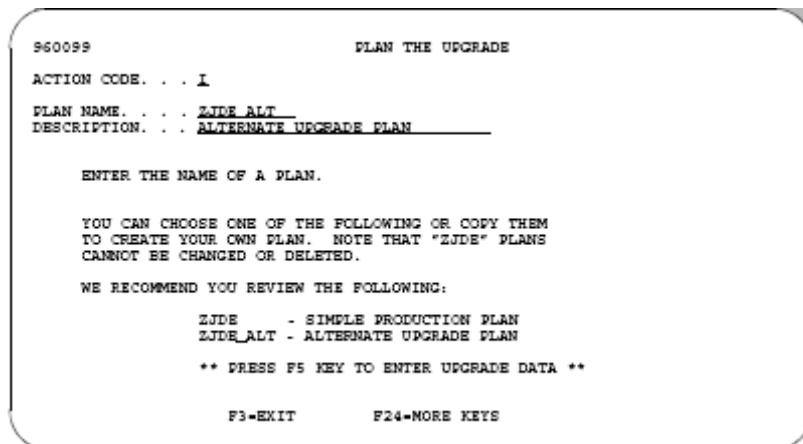
Create and Validate Upgrade Plan

Sign on as JDEINSTAL to Access the Software Upgrade Menu



Create Upgrade Plan

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



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 displays.

96003	Plan the Upgrade Libraries for this plan	Screen 1 OF 3
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. A92		
New JDE Release Level. A92PC00001		
Production LSF Library		
Install Source Library 1 (1=Yes, 0=No)		
Install Object/Data Libraries. . . 1		
Lib Typ	Library Name	Library 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 Release Level and 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 complete environment. If you have payroll in a separate data library, it must be included as a second DTA type in the plan. It is recommended that you install source.

1. The Current JDE Release Level for your plan must be A9.2 and the New JDE Release Level must be A92PC00001 for Single Byte or A92PC000X1 for Double Byte.
2. Leave the Production LSF Library line blank.
3. Change the library name fields to reflect the names of your alternate environment libraries.

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.

Note: To install 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.

Press Enter twice. The Merge Information screen displays.

96001E	Plan the Upgrade Merge Information	Screen 2 of 3
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 Aplic. 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 are searched and the correct locations are 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 QPRINT

OUTPUT QUEUE QPRINT

WIDTH OF FORM. 112
LENGTH OF YOUR FORM. 68
OVERFLOW LINE. 62
CHARACTERS PER INCH. 15
LINES PER INCH. 2
FORM TYPE. 1STD
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 redisplays.

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. Q

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

DOUBLE BYTE ENVIRONMENT. Q
CONVERT DATA TO UPPER CASE Q <-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.

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 might 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 Data Dictionary Field Ownership	Screen 3 Of 3
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 displays.

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 *UPD 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		Upgrade Planner Validation Report		Page - 1	Date - 2/05/97		
Plan Name	User ID	Plan Name		ERROR CODES			
JORGE1	JDEINSTAL	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	JMPDATA	JM DATA LIBRARY		3102,			
CBJ	JMPCBJ	JM OBJECT LIBRARY		3102,			
SEC	JMPSRC	JM SECURITY LIBRARY		3102,			
SRC	JMPSRC	JM SOURCE LIBRARY		3102,			
CCM	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('XXXXXXXXXX') 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 is 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 lists the file and the

library in which the duplicate was found for each duplicate file, or it indicates "NO DUPLICATE FILES FOUND."

You need to clean up any duplicate files on the report before you initiate the upgrade. Evaluate the number of records in each duplicate file and note that the system updates the first file in the library list before removing a duplicate file. When you delete files, you must verify that they do not contain any records needed for processing.

J.D Edwards & Company Duplicate Files Found Report Plan Name . . . JORGE1				Page - 1 Date - 2/05/97 Time - 14:32:14
Object Name	Object Library	Object Type	Description	
F0092	ALTOCM	*FILE	Library Lists - User	
F0092	ALTDTA	*FILE	Library Lists - User	
F0092LA	ALTOCM	*FILE	LF - Multi Format by Library L	
F0092LA	ALTDTA	*FILE	LF - Multi Format by Library L	
F0092LB	ALTOCM	*FILE	LF - Group/User	
F0092LB	ALTDTA	*FILE	LF - Group/User	
F0092LC	ALTOCM	*FILE	LF - Multi Format by Security	
F0092LC	ALTDTA	*FILE	LF - Multi Format by Security	
F0092LD	ALTOCM	*FILE	LF - Department	
F0092LD	ALTDTA	*FILE	LF - Department	
F0101	ALTOCM	*FILE	Address Book Master	
F0101	ALTDTA	*FILE	Address Book Master	
F0411	ALTOCM	*FILE	Accounts Payable Ledger	
F0411	ALTDTA	*FILE	Accounts Payable Ledger	
F0411LA	ALTOCM	*FILE	LF - Address No, Doc Ty/No/Co,	
F0411LA	ALTDTA	*FILE	LF - Address No, Doc Ty/No/Co,	
F0411LB	ALTOCM	*FILE	LF - Address No, Check No, Bank,	
F0411LB	ALTDTA	*FILE	LF - Address No, Check No, Bank,	
F0411LC	ALTOCM	*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 > *UPD	*INSTALL,*REINSTALL,*UPD,*ALT
Upgrade Plan Name > <u>ZJDE ALT</u>	From Upgrade Planner
+ for more values	
Source Media > *SAVF	Device Name,*SAVF,*DISK
Current JDE Release Level . . . > A92	From Upgrade Planner
New JDE Release Level > A92PC00001	From Upgrade Planner
Run Validator Program 1	1=Yes,0=No
Product library jdea9201	Library Name
Update library a92pc00001	*NONE, Library Name
Update Step Option 0	0=Both,1=Step One,2=Step Two
Bottom	
F3=Exit F4=Prompt F5=Refresh F10=Additional parameters F12=Cancel	
F13=How to use this display F24=More keys	

2. In the Upgrade Type field, enter *UPD.
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 *SAVF.
5. In the Current JDE Release Level field, type A92.
6. In the New JDE Release Level field, type A92PC00001 for Single Byte or A92PC000X1 for Double Byte.
This release level must match the new JD Edwards World release level specified in the upgrade plan.
7. Leave the Run Validator program field set to 1.
8. In the Product Library field, type JDEA9201 for Single Byte or JDXA9201 for Double Byte.
9. In the Update Library field, type A92PC00001 for Single Byte or A92PC000X1 for Double Byte.
10. Leave the Update Step Option field set to 0.
11. Press F10 if you want to change the Hold on job queue option.
12. 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

The first part of the upgrade process (PTF_STEP1) restores the software from the save files in library JDEA9201 for Single Byte or JDXA9201 for Double Byte and sends you messages as it restores the object, data, and source files to the PTF library (A92PC00001 for Single Byte or A92PC000X1 for Double Byte). The following messages display: PTF objects and data files have been restored and PTF source has been restored.

The second part of the upgrade process (PTF_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 signon using your JD Edwards World User Profile to continue” (approximately halfway through PTF_STEP2), you can sign on and begin Phase Three.

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

Note: Step 2 halts 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 can restart the Upgrade by typing * UPD for the Upgrade Type and *DISK for Source Media on the Start the Upgrade command and run Step 2 only.

After PTF_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: PTF_STEP1 builds work files for all plans before it begins the restore process. PTF_STEP2 performs file conversions and merges for the first environment. A PTF_STEP2 job performs file conversions and merges for each subsequent plan.

You do not receive the message. “You may now signon using your JD Edwards World User Profile to continue,” until the last PTF_STEP2 runs.

Note: The upgrade process produces job logs (QPJOBLOG) for PTF_STEP1 and PTF_STEP2. Keep job log files (QPJOBLOG) in an output queue where they are not deleted. They are extremely useful for resolving upgrade issues.

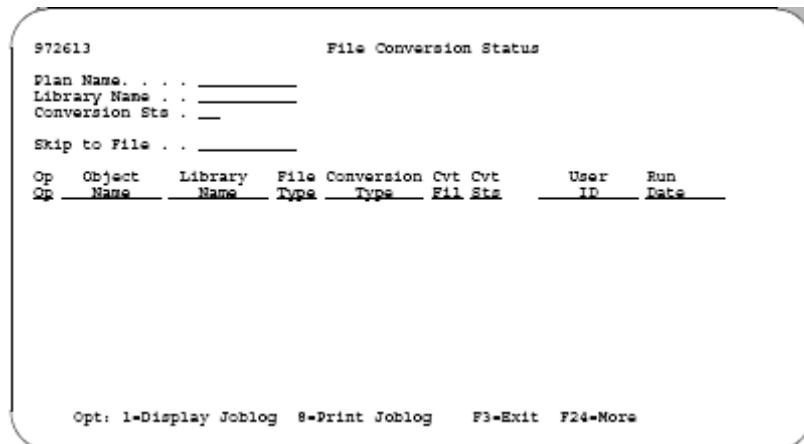
The PTF_STEP1 job log shows what happened during the Save File restore portion of the upgrade process. The PTF_STEP2 job logs (and PTF_STEP2 if upgrading multiple environments) show what happened during file conversions and merges.

Inquire on File Conversion Status

After PTF_STEP2 completes, check for file conversions that completed abnormally and resolve any problems.

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 displays for each plan.

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



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.

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, run the menu comparison report, and update some of your JD Edwards World control files.

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

Create New Files

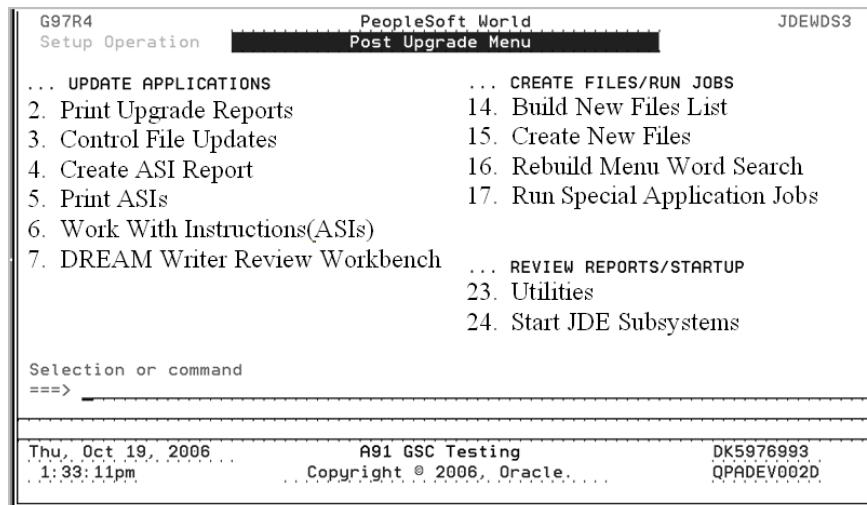
Sign on with a User that Accesses the Environment to Update.

Single Byte Customers Only - Download Create New Files Software Update

Software Update A738967010 is available from the Update Center and must be installed to your alternate environment. Installation instructions are included with the download. There are also special instructions in the cover letter.

Build New Files List Report

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



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 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 A9.2 Update 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.

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/Data/*ALL field).

Note: If you do not have a common library, type an asterisk (*) instead of C or D in the Com/Data/*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					File Count 4																																			
Plan Name	NF					SIMPLE PRODUCTION PLAN																																			
Rpt System Code	_____					All System Codes																																			
File Type (PF/PFS/LF/*)	_____					All File Types(PF/PFS/LF/*)																																			
Com/Data/*ALL (C/D/*)	C					Common Files																																			
From Library.	JDFDTA92					Source Library. JDFSRC92																																			
Create In Library	JDFDTA91																																								
<table border="1"> <thead> <tr> <th>Opt</th> <th>File Name</th> <th>Sys</th> <th>Typ</th> <th>Com</th> <th>Data</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td> </td> <td>F12424</td> <td>12</td> <td>PF</td> <td>Y</td> <td>Y</td> <td>Cost Analysis Work File</td> </tr> <tr> <td> </td> <td>F98016</td> <td>98</td> <td>PF</td> <td>Y</td> <td>Y</td> <td>SVR-Entry Parameter Definitions</td> </tr> <tr> <td> </td> <td>F99602</td> <td>97</td> <td>PF</td> <td>Y</td> <td>N</td> <td>Media Contents/Inventory-Libraries & Sys</td> </tr> <tr> <td> </td> <td>F99700</td> <td>97</td> <td>PF</td> <td>Y</td> <td>N</td> <td>Client Configuration</td> </tr> </tbody> </table>						Opt	File Name	Sys	Typ	Com	Data	Description		F12424	12	PF	Y	Y	Cost Analysis Work File		F98016	98	PF	Y	Y	SVR-Entry Parameter Definitions		F99602	97	PF	Y	N	Media Contents/Inventory-Libraries & Sys		F99700	97	PF	Y	N	Client Configuration	
Opt	File Name	Sys	Typ	Com	Data	Description																																			
	F12424	12	PF	Y	Y	Cost Analysis Work File																																			
	F98016	98	PF	Y	Y	SVR-Entry Parameter Definitions																																			
	F99602	97	PF	Y	N	Media Contents/Inventory-Libraries & Sys																																			
	F99700	97	PF	Y	N	Client Configuration																																			
Opt: .1=Use Source, .2=CrtDup, wo/Data, .3=CrtDup, w/Data, .F4=Dtl, F5=JDE, Dfts...																																									

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/Data/*ALL field, specify D to show all the production data files.
 - In the Create In Library field, specify the name of the data library in which you want the files created.

Note: If you have multiple DTA libraries in your plan, make sure to create the new files in the correct library.

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

Run the Menu Comparison Report

The following was done when the menu merge ran during the upgrade:

- Added new menus
- Added new selections to existing menus
- Removed obsolete selections from menus
- 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 might have additional 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
		Display Level. . . .
Menu Comparison Report		
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 library with NEW menus. If left blank, new menus will not be created in your production library.		
1 _____		
** 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.		
1 _____ + _____		
F5=Printer Overrides		

98312	Processing Options Revisions	Form ID. . . . P98340
		Version/Histor ZJDE
		Display Level. . . .
Menu Comparison Report		
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.		
1 _____ - _____		
4. Enter your Production library name containing the Menu files.		
1 _____ + _____		
F5=Printer Overrides		

98312	Processing Options Revisions	Form ID. . . . P98340
		Version/Histor L0RI
		Display Level
Menu Comparison Report		
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. . . . .	.....	.....
Menu Mask . . . . .	.....	.....
..... F5=Printer Overrides		

3. Enter the processing options with appropriate information:
 - Processing Option one must have a '1'
 - For processing option 2, enter a blank and a Menu Comparison report (R98340) is produced. Then, after you review the Menu Comparison report, you can go back and set processing option 2 to a '1' if you want to overlay 'G' menus. If you decide to overlay the 'G' menus, you can then use the Menu Comparison report to put back any custom changes such as menu masking

Note: If you have custom G menus, they must be coded to systems 55-69 if you are going to enter a 1 in processing option 2.

 - Processing option 3 is the JDF type library name from your plan
 - Processing option 4 is the COM type library name from your plan assuming that is the library containing the menu files
4. If you did not, go back and enter a '1' for processing option 2 to rerun the Menu Comparison report, use the Menu Comparison report to make changes to your menus by either copying the menus or changing individual selections. Procedures for both methods are detailed in the Update the Menu files section.

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

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

The Work with Spooled Files (WRKSPLF) screen displays.

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) and the Menu Comparison Report to determine the changes to make.

Note: If you overlaid the G menus when running the Menu Comparison Report, you do not need to Update Menus.

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 might 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 must 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 Menu Merge Exceptions				Page - 1 Date - 2/05/97 Mode - Replace	
FROM Library -	TO Library -						
Menu Id	Menu Title	S1 No	Selection Description	Job to Execute	Option Key	Version	Message
G08E3	Employee Advanced/Technical Op	03	Purge Employee Job File	J0601182	P0601182		New pgm for release
		14	Compa-Ratio Calculation	J082501	P082501		New pgm for release
G08E43	International Information Setup	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	ZJDB0001	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	P082009		New pgm for release
		05	Review Work Group Detail	J082007	P082007		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	P082003		New pgm for release
G08P1	Position Control	17	Position Headcount	J081441	P081441		New pgm for release
G08P3	Position Control Advanced/Tech	13	Requested	(J08902)	J08902	P08902	ZJDB0001
		19	Approved	(J08902)	J08902	P08902	ZJDB0002
		20	Final	(J08902)	J08902	P08902	ZJDB0003
		22	Create Batch	(J08911)	J08911	P08911	ZJDB0001
G08N2	Wage & Salary Administration	14	Compa-Ratio Calculation	J082501	P082501		New pgm for release
G08N4	Wage & Salary Administration	15	Pay Grade/Step Table	J082003	P082003		New pgm for release
G0911	Journal Entry, Reports, & Ingru	08	Post General Journal	J09800	P09800	ZJDB0001	* Review Security
G0921	Account Reconciliation	08	Debit/Credit Match	J09131D	P09131D	ZJDB0001	New pgm for release
G09211	Bank Statement Processing	10	Post General Journal Batches	J09800	P09800	ZJDB0001	* 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.

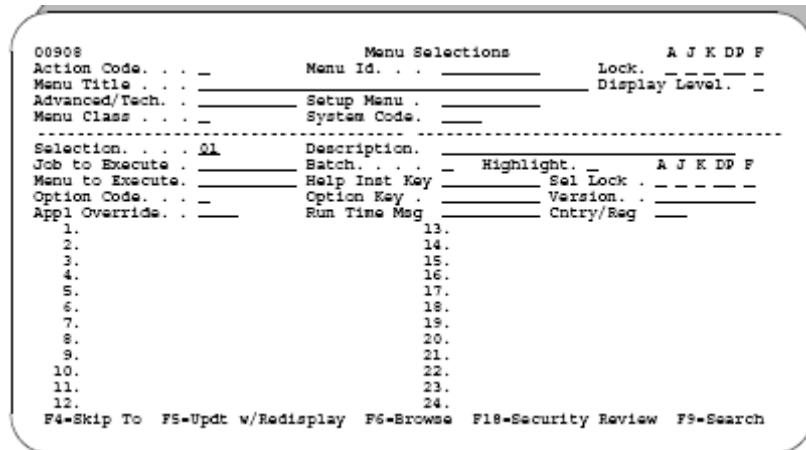
From the Post Upgrade Menu (G97R4), select Control File Updates. From the Control File Updates menu, select Copy DD, VO, DW, UDC, SVR, Menus.

99630	Copy DD,VO,DW,UDC,SVR,Menus		
From Library	JDEDTAALT	To Library	ALTCOM
Dictionary Item.	Language . . .	Appl Ovr . . .	Scrn/Rpt . . .
Vocabulary Overrides	Language . . .	Appl Ovr . . .	
DREAM Writer Form.	Language . . .		
User Def Codes Sys	Language . . .		
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.



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 User Defined Code Merge				Date - 2/05/97 Page - 1 From - JDFTDTAALT To - ALTOON Mode -			
INS	Code	Code	Description 1	Description 2		Code	2nd	Code	Merge
Type						Lang	Lm	Mun	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
	P03114		2000						F0005 Added
	P04257		250						F0005 Added
	P042571		250						F0005 Added
	P042572		250						F0005 Added
	P042573		250						F0005 Added
	P09131		1000						F0005 Added
	P09181		1000						F0005 Added
	P12214		250						F0005 Added
	P41200		100						F0005 Added
	P41202		17						** Already Exists
									** Already Exists

Review and Update a UDC

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

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.

Review and Update an AAI

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

Sequence Number	Company Bus. Unit	Object	Sub	Item
.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 FS=Acct Struct by BU F15-AAI Rev F21=Print F24=More Keys				

1. Press F15 (AAI Revisions).

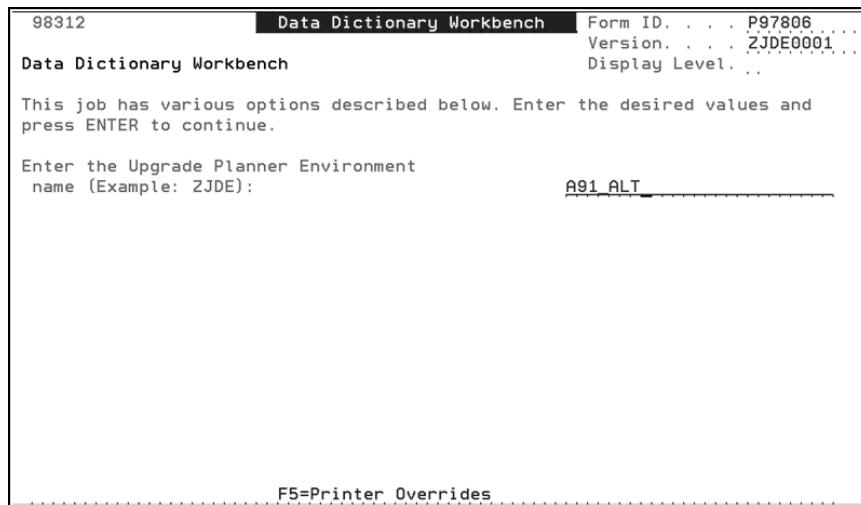
2. Inquire on an Item number and change the account number for company 00000, or add new AAIs for your company or companies and assign appropriate account numbers.

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 are going to be reviewed are those that had a 'C' on the DD Field Ownership screen in the plan used for the upgrade. The user applies 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 can 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.



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

The From lib is the 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.

Data Dictionary Workbench				Plan Name. A7391	
Action Cd	DD Field	Original Value	New JDE Value.		
I	*	*	*		
Resolution	Original Value		*		
Data Item.	New JDE Value.		*		
Scrn/Rpt.	Alias Type		*		
Appl Ovrrd	Fld Alias		*		
	Language	From Lib.	JDFDTA91		
		To Lib.	JDFD73159		
				Appl L	
				Ovr	
O	Rs	DD			
P	Cd	Item	Field	Current Value	
				Appl L	
				Ovr	
-	AJ	#AB	SY	00	
-	AJ	#ACF	SY	10C	
-	AJ	#ADD	DSCA	Address Line 7 (State & Postal Code)	
-	AJ	#ANP	HP1	P01200	
-	AJ	#BUF	SY	10C	
-	AJ	#CA	ERO1	Y N F ..	
-	AJ	#CA	ERUL	VALUE	
-	AJ	#CBA	HP1	P0030W	
-	AJ	#CLC	DVAL		
-	AJ	#CLP	DVAL		
-	AJ	#CYR	DVAL	20	
-	AJ	#DAT	ERO1		

Pressing F4 displays changes
to Data Items

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 A9.2 Update 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) displays.

98302	Create ASI Report		Form ID. . . . P98490
			Version. . . . ZJDE0002
ASI Report Instructions by System			
I	Explanation	.. Selection ..	
N		Rel	Value
And	Y Release	EQ	A92PC00001
And	Y Product 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 A92PC00001 for Single Byte or A92PC000X1 for Double Byte and press Enter.

Print ASI Report

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

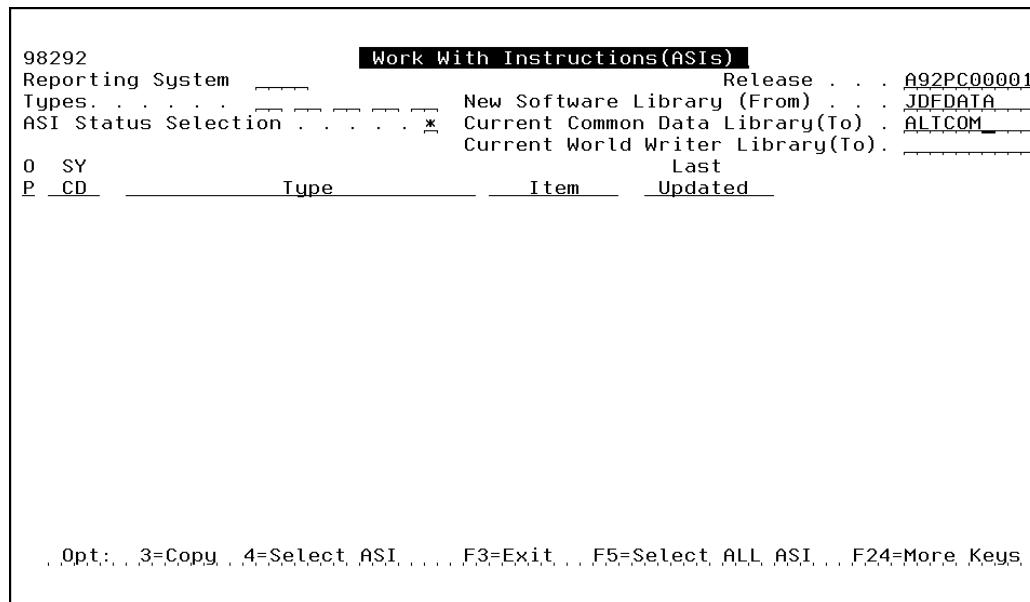
1. Print the following reports if you created them in the previous item:

R98490	ASI Report
--------	------------

Work with Application Specific Instructions (ASIs)

Display the ASIs

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



1. In the Release field, type A92PC00001 for Single Byte or A92PC000X1 for Double Byte.
2. In the New Software Library (From) field, type the name of the JDF 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 must 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, change to the ID of the user who makes the changes.

Note: Some of the ASIs might already be done in your environment.

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 displays.

The screenshot shows the ASI Inquiry/Update screen with the following details:

98291 ASI Inquiry/Update ASI

Ty / Item. : : : : UD / 0010
Priority : : : : 1

User Defined Codes

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

Reason: P09200 now contains the I/O Control Limit Exceeded program (P0010) 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 F14-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 displays 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 displays. 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 displays again. The Last Updated fields indicate the library locations where the ASIs were applied.

MULTI-PLANS: The Last Updated fields 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 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 are required to review them as you use them. When you attempt to run one of these versions for the first time, a window displays that indicates the DREAM Writer parameters that have changed for that version. If users are reviewing the versions at runtime, they must pay special attention to Processing Option changes. Values must be reviewed as they might 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 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).

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

98351 DREAM Writer Review Workbench Review Type. . 1
System Code. .

Skip To Form ID. .

<input type="radio"/> Form ID	Description
<input checked="" type="radio"/> <u>P40211Z</u>	Batch Order Edit and Creation - Sales
<input type="radio"/> <u>P42520</u>	Pick Slips Print
<input type="radio"/> <u>P42565</u>	Sales Order Invoices Print
<input type="radio"/> <u>P42950</u>	Update Sales Order Cost/Price
<input type="radio"/> <u>P43500</u>	Purchase Orders Print
<input type="radio"/> <u>P48425</u>	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 . . 1
Mandatory Review

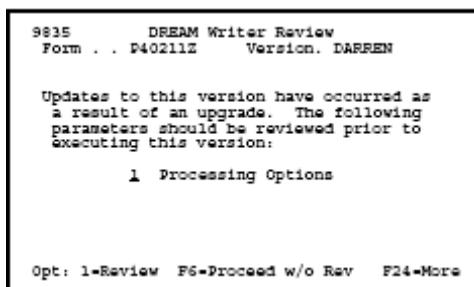
Skip to Version. . .

<input type="radio"/> Version	Description
<input checked="" type="radio"/> <u>DARREN</u>	
<input type="radio"/> <u>JMM001</u>	
<input type="radio"/> <u>MARKUS3</u>	
<input type="radio"/> <u>NRJ</u>	
<input type="radio"/> <u>SCT</u>	Batch Sales Order Edit/Creation - Recur
<input type="radio"/> <u>TC</u>	
<input type="radio"/> <u>ZJDE0001</u>	Batch Sales Order Edit/Creation
<input type="radio"/> <u>ZJDE0002</u>	Batch Sales Order Edit/Creation - Single
<input type="radio"/> <u>ZJDE0003</u>	Transportation Batch S/O Edit/Create
<input type="radio"/> <u>0001</u>	
<input type="radio"/> <u>0002</u>	

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).



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 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

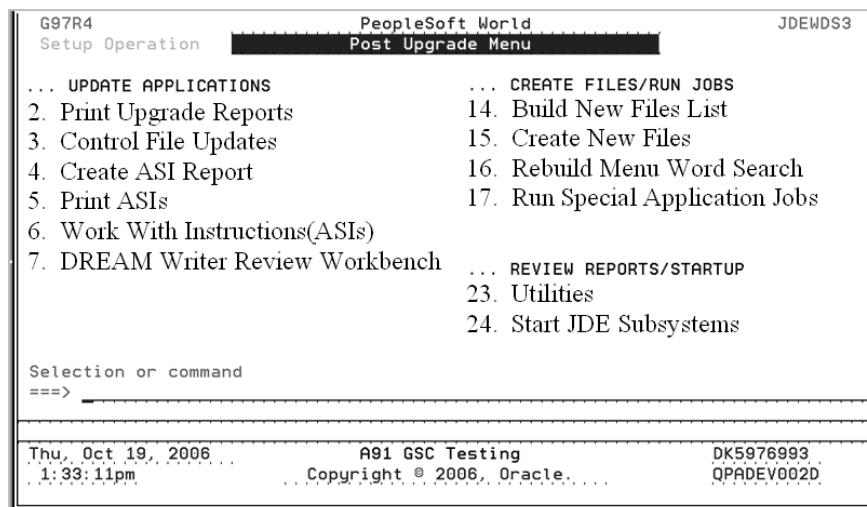
Phase Four – Run Special Application Jobs

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.



Rebuild Menu Word Search

From the Post Upgrade Menu (G97R4), select Rebuild Menu Word Search.

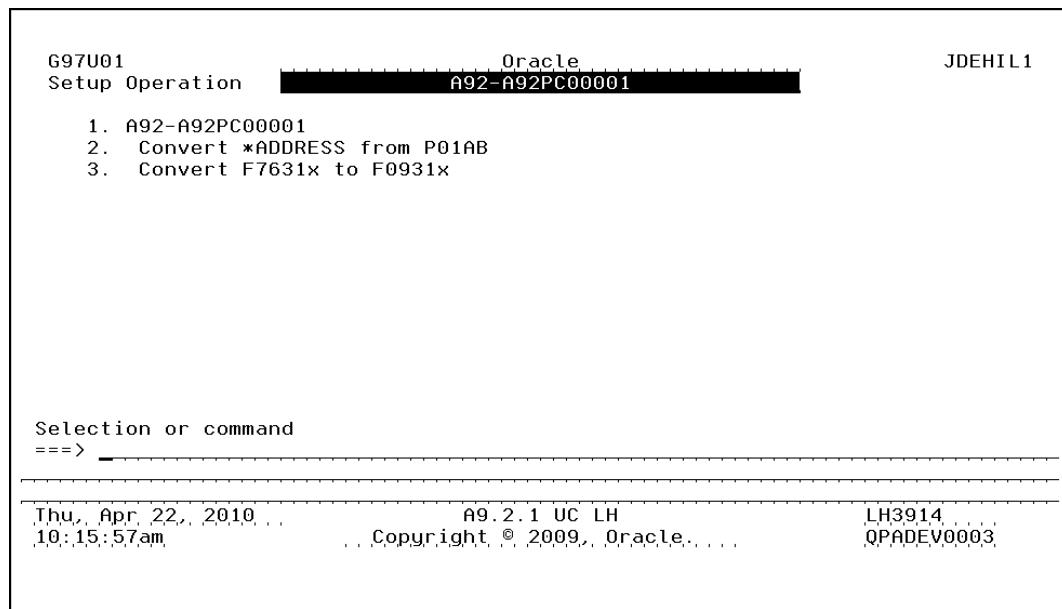
The job submits to batch.

Run Special Application Jobs

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

1. Type G97U01 on the command line.

The A9.2 Update 1 Special Jobs Menu displays.



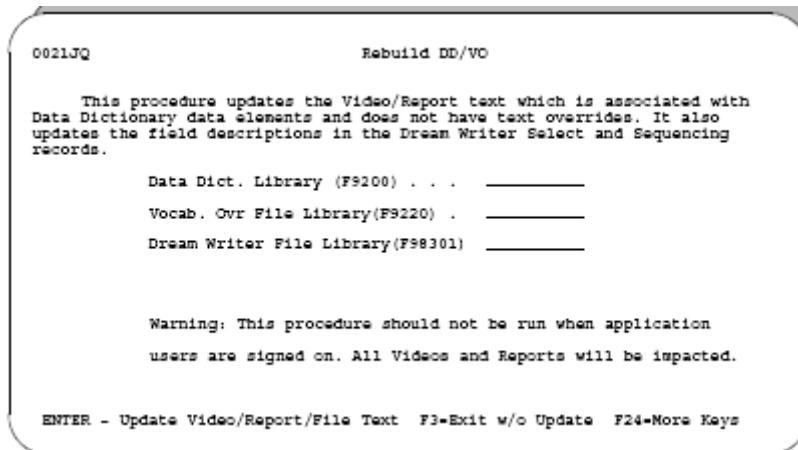
2. Read the menu message for each job and execute the jobs that apply to the applications you have installed.

Activate Triggers

If you require triggers on your alternate environment, you must start with new audit files and activate the triggers in the alternate environment. Do not use Menu G946 option 8. If you use this option, triggers are activated for your alternate environment files but records are added to your production audit files.

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.



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.

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.

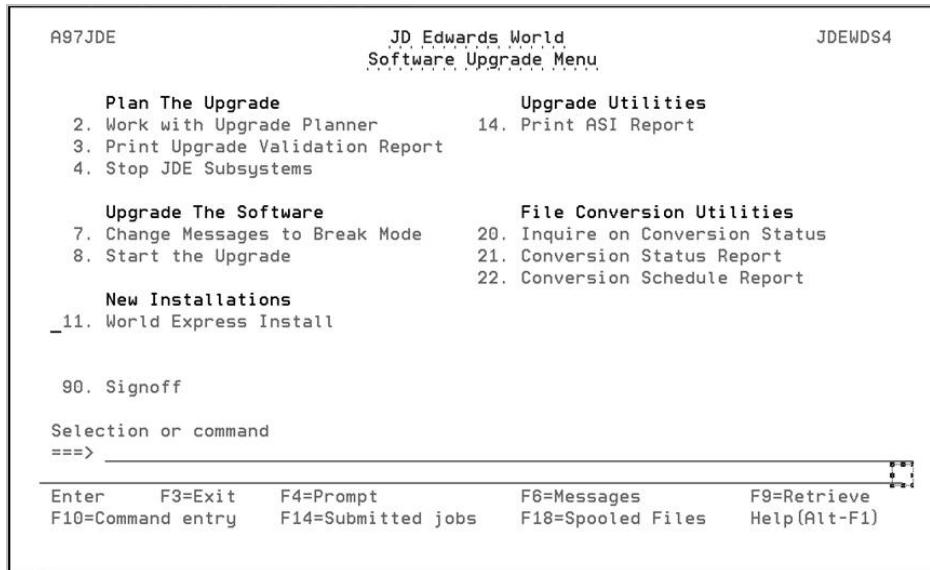
Work with 'Z' Libraries

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 might 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



Print the Conversion Status Report

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

1. From the Software Upgrade Menu (A97JDE), select Conversion Status Report. The Version Selection screen displays 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 displays.
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 displays 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 can print the reports found under PTF_STEP2.

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 A9.2 Update 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 A9.2 Production Environment

This section is to upgrade an A9.2 production environment to A9.2 Update 1 only.

If your production environment is A9.2, continue with the Application Considerations step and the remainder of Phase 6 of this guide.

Caution: If your production environment is A7.3 or A8.1, do not use Phase Six of this guide. Instead, use Phase Six of the JD Edwards World Upgrade Guide for Upgrades from A8.1 and A7.3, Version A9.2.

The Upgrade Guide for Upgrades from A8.1 and A7.3 can be found on My Oracle Support (login required) using the following link:

<https://support.us.oracle.com/oip/faces/secure/km/DocumentDisplay.jspx?id=745439.1>

Application/Technical Considerations

Run Integrity Reports

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

Accounts Payable

The F04571, F04572, and F04573 files are 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.

Contract Billing and Service Billing

All Invoice Generation and Journal Generation processes must be completed before starting the upgrade process. After completing these processes, the F48910 and F48911 work files are empty.

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.

IBM Journaling

IBM Journaling must be turned off before you start the A9.2 Update 1 upgrade.

Delete Physical File

Use the DLTF command to delete the F76B620 file if it exists.

Database Audit Manager and Other Triggers

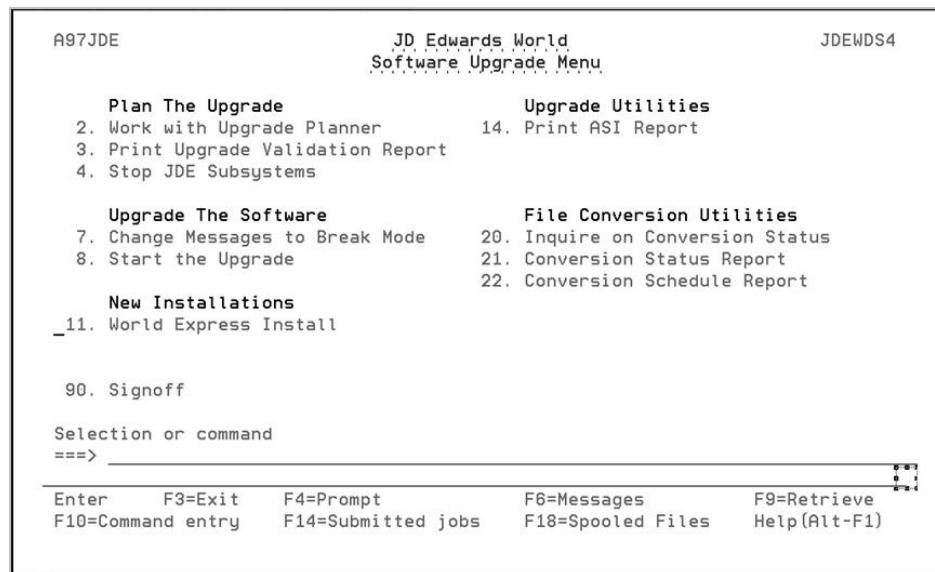
Deactivate Triggers in Database Audit Manager. Access menu G946 option 4 and verify if any files have the Status *ACTIVE, if yes, then enter a 5 in front of each file listed to turn the trigger off. If you have Option 7 on menu G946, Deactivate All Configurations, you can use this option.

Note: Triggers cannot be turned off or on if the file is locked.

To identify other triggers, use the PRTTRGPGM command to produce a report. Use the RMVPFTRG command to remove triggers from the files.

Create and Validate Upgrade Plan

Sign on as JDEINSTAL to Access the Software Upgrade Menu



Note: Some screen graphics are not shown for some of the following steps. See Phases 2, 3, and 4 for screen graphics.

Create Upgrade Plan

You must create an upgrade plan that is based on the ZJDE model plan. In addition to the setup instructions given for the upgrade planner in Phase One, follow these guidelines.

1. Inquire on the ZJDE upgrade plan and add a new plan to upgrade your production environment to A9.2 Update 1.
2. Change the library names to match the libraries in your production environment. For instance, type the name of the common library that is in your production environment in the Library Name field for library type COM.
3. The Install Source Library and Install Object/Data Libraries fields must be set to 1.
4. Leave the Production LSF Library line blank.
5. Verify the library names on the Merge Information screen. JD Edwards World recommends that you do not change the merge modes.
6. The settings on the Data Dictionary Field Ownership screen must be the same as the plan used to upgrade the alternate environment to A9.2 Update 1.
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 *UPD for the 4th processing option.

Stop JD Edwards World Subsystems

Sign on as JDEINSTAL

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 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 have.

Back up Libraries

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

IBM Journaling

IBM Journaling must be turned off before you start the A9.2 Update 1 upgrade.

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 displays.
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.
4. In the Upgrade Type field, enter *UPD.
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, press Enter and then enter the additional plans in the fields provided.
6. In the Source Media field, type *SAVF.
7. In the Current JDE Release Level field, type A92.
This release level must match the new JD Edwards World release level specified in the upgrade plan.
8. In the New JDE Release Level field, type A92PC00001 for Single Byte or A92PC000X1 for Double Byte and press Enter.
9. Leave the Run Validator program field set to 1.
10. In the Product Library field, type JDEA9201 for Single Byte or JDXA9201 for Double Byte.
11. In the Update Library field, type A92PC00001 for Single Byte or A92PC000X1 for Double Byte.
12. Leave the Update Step Option field set to 0.
13. Press F10 if you want to change the Hold on job queue option.
14. After you verify the information, press Enter.

Track the Progress of the Upgrade

The first part of the upgrade process (PTF_STEP1) restores the software from the save files in library JDEA9201 for Single Byte or JDXA9201 for Double Byte and sends you messages as it restores the object, data, and source files to the PTF library (A92PC00001 or A92PC000X1). The following messages display:

PTF objects and data files have been restored and PTF source has been restored.

The second part of the upgrade process (PTF_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 signon using your JD Edwards World User Profile to continue” (approximately halfway through PTF_STEP2), you can sign on

Note: Step 2 halts 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 can restart the upgrade by typing *UPD for the Upgrade Type and *DISK for Source Media on the Start the Upgrade command and run Step 2 only.

After PTF_STEP2 completes, the upgrade process submits the following job automatically:

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

Inquire on File Conversion Status

After the PTF_STEP1 and PTF_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.

Create New Files

See Phase 3 for instructions on Create New Files. First, if you are a Single Byte customer, you must apply Software Update A928967010 to your production environment. Then, 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.

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 are 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.

Note: Any ASIs for files not on the list to copy need to be performed. An exampled is Special Instructions ASIs.

Control File Changes not Monitored

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

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

- If you were unable to copy the Menu files, run the Menu Comparison Report and update menus if required. Print the menu reports (R97883A, R97883B) and perform the manual changes
- If you were unable to copy the User Defined Code (UDC) files, print (or view online) the UDC report (R987241) and perform the manual changes
- 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 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
- Perform all Special Instruction ASIs

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.

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 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 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.

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.

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.

Appendix A – Control File Dependencies

Certain sets of control files must be maintained in the same library on your machine to avoid problems when using or upgrading JD Edwards World Software. In addition, Data Dictionary, Vocabulary Overrides/Function Keys, and User Defined Codes sets must be in the same library. The remaining sets of files can be in different libraries, but all files in a particular set must be in the same library.

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

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 are not affected.

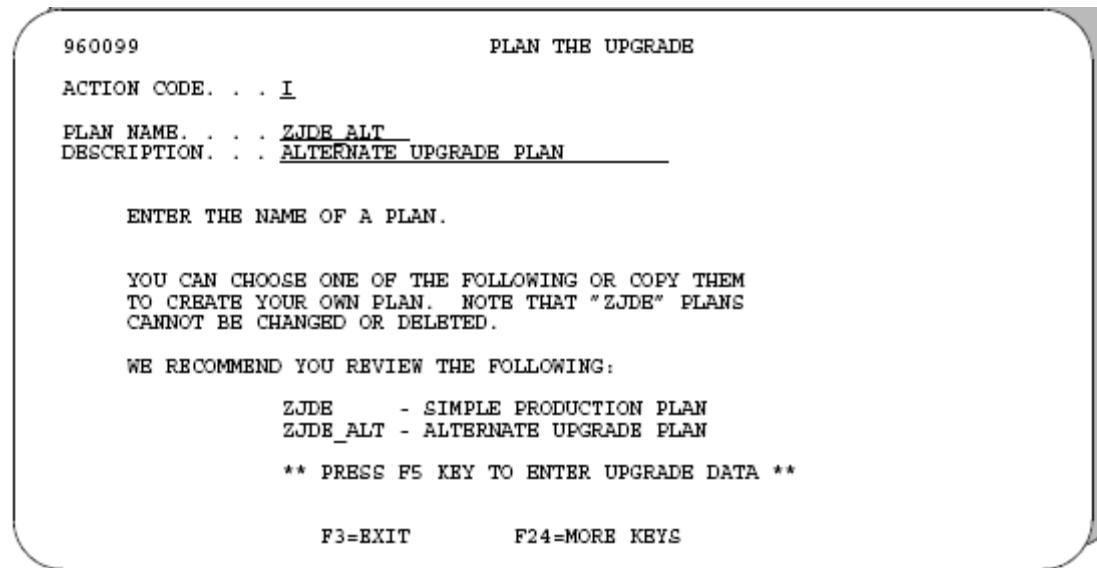
- Creates the JDEINSTAL user profile if it does not exist on your machine
- Sends a message that tells the installer to sign on as JDEINSTAL

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 uses.



To display a list of all available plans, move the cursor to the Plan Name field on the Plan the Upgrade screen, and press F1. 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.

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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	ALTDATA	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	<p>Specify the current JD Edwards World software release level of the environment you want to upgrade.</p> <p>Note: Do not type more than three characters in this field.</p>
New JD Edwards World Release Level	<p>Specify the JD Edwards World software release level to which you want to upgrade your environment (for example, A92PC00001).</p>
Production LSF Library	<p>Specify the Production Object library name containing the F99LSF file.</p>
Install Source Library	<p>Specify whether you want the JD Edwards World source code library (usually JDFSRC) restored. Valid values are:</p> <ul style="list-style-type: none"> <li data-bbox="943 808 1339 870">0 Do not restore the source code library. <li data-bbox="943 893 1339 916">1 Restore the source code library.
Install Object/Data Libraries	<p>Specify whether you want the JD Edwards World object and data libraries (usually JDOBJ and JDFDATA) restored. Valid values are:</p> <ul style="list-style-type: none"> <li data-bbox="943 1083 1372 1144">0 Do not restore the object and data libraries. <li data-bbox="943 1167 1388 1191">1 Restore the object and data libraries.

Field	Explanation
Lib Typ (Library Type)	<p>Specify the type of library. Valid values are:</p> <p>COM Common Library</p> <p>CSO Custom Object</p> <p>CSS Custom Source</p> <p>DTA Client's Data Library</p> <p>JDF JD Edwards World Data Library</p> <p>KBG CASE Constants Library</p> <p>OBJ JD Edwards World Object Library</p> <p>SEC Security Library</p> <p>SRC JD Edwards World Source Library</p> <p>Note: Do not create new library types, which causes unpredictable results. In addition, do not specify more than one library for JDF, OBJ, SEC, and SRC library types.</p>
Library Name	<p>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.</p>
	<p>Specify the name of a library for this environment.</p>
	<p>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.</p>
	<p>Note: If a library you specify in this field does not exist on your machine, the Create Plan Library screen displays 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 displays 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 is updated automatically.</p>

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 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.

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Merge Information

Plan Name ZJDE_ALT TEST (ALTERNATE) PLAN

Specify Merge Modes And Library Names.

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

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	<p>Specify the mode in which you want the merge to run.</p>
	<p>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.</p>
	<ul style="list-style-type: none"> 0 Do not run the merge (No Merge). 2 Run the merge and generate the reports (Final). 3 Run the language upgrade (Replace).
	<p>This is valid for language upgrades only. For upgrade, it runs as 2 (Final).</p>
	<p>Note: To update the data dictionary glossary, see <i>Advanced Options Screen</i> in this appendix.</p>
Data Dictionary Library Name	<p>Specify the name of the production library that contains your Data Dictionary file (F9200).</p>
Vocab. Overrides Merge	<p>Specify the mode in which you want the merge to run.</p>
	<p>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.</p>
	<ul style="list-style-type: none"> 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 runs as 2 (Final).
Vocabulary Overrides Library Name	<p>Specify the name of the production library that contains your Vocabulary Overrides file (F9220).</p>

DREAM Writer Merge	<p>Specify the mode in which you want the merge to run.</p> <p>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.</p> <p>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.</p> <ul style="list-style-type: none">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 runs 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.
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For upgrades:

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

It might produce a Menu Merge Exceptions report, which lists new and obsolete programs and other menu conditions which might 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	<p>Specify the mode in which you want the merge to run.</p> <p>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.</p> <ul style="list-style-type: none"> 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 runs as 2 (Final). <p>Note: To update the user defined code detail text, see Advanced Options Screen in this appendix.</p>
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	<p>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.</p> <p>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.</p> <ul style="list-style-type: none"> 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	<p>Specify the mode in which you want the merge to run.</p> <p>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.</p> <p>0 Do not run the merge (No Merge). 3 Run the merge in replace mode (Replace).</p>
Help Master Library Name	Specify the name of the production library that contains your Help file (F98HELP).
Software Repository Merge	<p>Specify the mode in which you want the merge to run.</p> <p>0 Do not run the merge (No Merge). 2 Run the merge and generate the report (Final).</p>
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	<p>Specify the mode in which you want the merge to run.</p> <p>The merge does not produce a report.</p> <p>0 Do not run the merge (No Merge). 2 Run the merge (Final).</p>
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 ZJDB_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	<u>QPRINT</u>
WIDTH OF FORM	132
LENGTH OF YOUR FORM	68
OVERFLOW LINE	62
CHARACTERS PER INCH	15
LINES PER INCH	8
FORM TYPE	<u>*STD</u>
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 is used.
Width of Form	Specify the width of the form you 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 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 must 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 might 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. ZZDB_ALT ALTERNATE UPGRADE PLAN

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

	<u>1/0</u>	(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.

The following table explains the fields on this screen.

Field	Explanation
Hold on Print Queue	<p>Specify whether to hold the print file in the print queue rather than printing it. Valid values are:</p>
	0 Do not hold files on the print queue.
	1 Hold files on the print queue.
Run Control File Conversion	<p>Specify whether control file conversion must run during the upgrade process. Leave this value set to 1 unless you are instructed otherwise. Valid values are:</p>
	0 Do not run control file conversion.
	1 Run control file conversion.
Update Data Dictionary Glossary	<p>Specify whether the data dictionary glossary must be updated during the upgrade process. If you have changed the glossary extensively in the past, you might 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:</p>
	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) must 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 must 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
Data Dictionary Field Ownership

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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 – 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

For the three procedures above, you must create the alternate environment before performing them.

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	JDE

You 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 ALTDATA JDFSRCALT QGPL.
4. From the menu, select User Signon List Revisions. Attach the alternate library list you just defined to the user profile that you are using 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	JDE

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 A9.2 Update 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.