

JD Edwards World

Upgrade Guide

Release A9.3.1

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Preface

Welcome to the JD Edwards World Upgrade Guide.

Audience

This guide is intended for implementers and end users of JD Edwards World Upgrade.

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Related Documents

You can access related documents from the JD Edwards World Release Documentation Overview pages on My Oracle Support. Access the main documentation overview page by searching for the document ID, which is 1362397.1, or by using this link:

- <https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&id=1362397.1>

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Phase One - Upgrade Process Overview (Release A9.3 Update)

This chapter contains these topics:

- [Section 1.1, "Upgrade Methodology,"](#)
- [Section 1.2, "Pre-Upgrade Application and Technical Instructions."](#)

1.1 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 your daily processing in the production environment.
- Modified or custom programs can be updated and tested in the alternate environment to verify they work with the upgraded software.
- Timings from file conversions in the alternate environment will help you plan for upgrading the production environment.

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

1.1.1 Alternate Environment Set up

Note: Before setting up the Alternate Environment, make sure you have performed the instructions in the A9.3 Update 1 Quick Installation Guide.

The libraries that exist in the alternate environment before you start the A9.3 Update 1 upgrade are full copies of your A9.3 production libraries. This includes JD FDATA, JD FOBJ, JD FSRC, data, control, and security files libraries. You must restore the libraries from a backup tape.

1.1.2 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. The file that is going to be deleted must not contain any records needed for processing.

1.1.3 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."](#)

1.1.4 Monitor Changes to JD Edwards World Control Files

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

Dual Maintenance

Apply all changes made to the JD Edwards World production control files and the alternate environment. Synchronize the files in both places. For a list of control files, refer to the Control File Changes Monitored chart in [Section 6.5, "Update Your Applications."](#)

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 [Section 6.5, "Update Your Applications."](#)

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 *JD Edwards World Database Audit Manager Guide*

1.2 Pre-Upgrade Application and Technical Instructions

1.2.1 Sign on to Production Environment

The instructions in this section should be performed in your production environment. In the next Phase, you will back up and restore the libraries from your A9.3 production environment to set up your A9.3 Update 1 alternate (test) environment.

Note: If your production environment is NOT A9.3, perform the Pre-Upgrade Application and Technical Instructions in your A9.3 alternate (test) environment.

Note: As of A9.3, J98INIT as the Initial Program on the IBM profile is obsolete. Only J98INITA is supported for A9.3 and above.

1.2.2 Run Integrity Reports

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

1.2.3 Accounts Payable

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

1.2.4 Custom Menus

If you have Custom menus that begin with 'G', you need to have them coded to systems 55-59.

1.2.5 Contract Billing and Service Billing

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

1.2.6 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 will 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, Deactivate All Configurations, on menu G946, 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 PRTRGPGM command to produce a report. Use the RMVPFTRG command to remove triggers from the files.

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

After the production data libraries are saved you can reactivate the Database Audit Manager triggers in the production environment (menu G946 option 8). For other triggers you removed, use the results from the PRTRGPGM 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

This chapter contains these topics:

- [Section 2.1, "Overview,"](#)
- [Section 2.2, "Set Up an Environment,"](#)
- [Section 2.3, "Check for DDM Files,"](#)
- [Section 2.4, "IBM Journaling,"](#)
- [Section 2.5, "Delete Files,"](#)
- [Section 2.6, "Create and Validate Upgrade Plan,"](#)
- [Section 2.7, "Start the Upgrade and Track Progress."](#)

2.1 Overview

For this phase of the upgrade, restore a full set of your A9.3 libraries, download the A9.3 Update 1 software from Oracle's Update Center, or copy the A9.3 Update 1 software files from the DVD+RW media. Next, set up an upgrade plan, which defines which data libraries are converting during the upgrade process and the libraries which contains the new A9.3 Update 1 software. After the upgrade plan is set up and validated, initiate the upgrade command.

2.2 Set Up an Environment

Note: If your production environment is NOT A9.3, use the A9.3 alternate environment you are currently using for testing A9.3.

Note: If you plan to convert multiple environments, please contact Oracle Support Services, JD Edwards World Technical group.

1. The first step in the upgrade process is to use a recent backup tape to restore your A9.3 libraries to another set of libraries. This includes libraries for data, control, and security files. Also, restore a copy of your A9.3 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.
4. If you were unable to deactivate triggers from the files used to create your alternate environment, you must remove the triggers from the files in your alternate libraries.

Refer to menu G946 option 2 in your production environment for a list of files that have *ACTIVE status.

To remove the triggers from the files in your alternate environment, on a command line, use the IBM command RMVPFTRG for each file in your alternate environment on the list from the prior step.

Next, clear the F98201, F98202, F98203, and F98204 database audit manager files in your alternate library using the CLRPFM command.

Note: Ensure that you entered the alternate environment library name in the RMVPFTRG and CLRPFM commands.

2.3 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.

2.4 IBM Journaling

IBM Journaling must be turned off on files that are part of the upgrade plan before you start the A9.3 Update 1 upgrade.

2.5 Delete Files

1. DLTF FILE(dtalib/F74R0430L*) where dtalib is your data library.
2. DLTF FILE(dtalib/F74R0430).
3. DLTF FILE(dtalib/F74R0433).
4. CRTDUPOBJ OBJ(F74R0411) FROMLIB(dtalib) OBJTYPE(*FILE) TOLIB(templib) DATA(*YES)
5. DLTF FILE(dtalib/F74R0411).

2.6 Create and Validate Upgrade Plan

2.6.1 Sign on as JDEINSTAL to Access the Software Upgrade Menu

Figure 2–1 Software Upgrade Menu screen

```

A97JDE                                JD Edwards World                                JDEWDS1
                                Software Upgrade Menu

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

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

New Installations
11. World Express Install

90. Signoff

Selection or command
===>

Enter      F3=Exit    F4=Prompt    F6=Messages    F9=Retrieve
F10=Command entry  F14=Submitted jobs  F18=Spooled Files  Help(Alt-F1)
Copyright© 1990,2011 Oracle.

```

2.6.2 Create Upgrade Plan

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

Figure 2–2 Plan the Upgrade screen

```

960099                                Plan the Upgrade

Action Code. . . I
Plan Name. . . ZJDE_ALT
Description. . . TEST (ALTERNATE) PLAN

Enter the name of a Plan.

You can choose one of the following or copy them
to create your own plan. Note that "ZJDE" Plans
cannot be changed or deleted.

We recommend you review the following:

ZJDE      - Simple production plan
ZJDE_ALT - Alternate upgrade plan

** Press F5 key to enter Upgrade Data **

F3=Exit    F5=Plan Data

```

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 B, "Upgrade Planner Screens."](#)

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

1. From the Plan the Upgrade screen, inquire on ZJDE_ALT (an upgrade plan model supplied by JD Edwards World).
2. In the Action Code field, type A (Add).
3. In the Plan Name field, type a name for the new upgrade plan.

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

4. In the Description field, type a description for the new upgrade plan.
5. To add the new upgrade plan, press Enter.
6. Inquire on the new upgrade plan, and then press F5.

The Libraries for This Plan screen appears.

Figure 2-3 Libraries for This Plan screen

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. A93

New JDE Release Level. A93PC00001

Production LSF Library

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

Install Object/Data Libraries. 0

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
JDE	JDEDTAALT	JDE DATA LIBRARY (ALTERNATE)
OBJ	JDEOBJALT	JDE OBJECT LIBRARY (ALTERNATE)
SRC	JDESRCALT	JDE SOURCE LIBRARY (ALTERNATE)

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

2.6.3 Indicate the Libraries for this Plan

The Libraries for This Plan screen allows you to specify your current and new JD Edwards World release levels, whether you want to install object and data only or source only, and the libraries that define one 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 A9.3 and the New JDE Release Level must be A93PC00001 for Single Byte or A93PC000X1 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.

You can view source only first, set the Install Source Library value to '1' and the Install Object/Data Libraries value to '0'. If you are installing source only, the plan needs to

have a JDF and OBJ type library that are populated. You can specify your A7.3, A8.1, A9.1, or A9.2 , or A9.3 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.

Press Enter twice. The Merge Information screen appears.

Figure 2–4 Merge Information screen

```

96001E                               Plan the Upgrade                               Screen 2 Of 3
                                Merge Information

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

Specify Merge Modes And Library Names.

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

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

```

2.6.4 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 B, "Upgrade Planner Screens."](#)

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

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

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

- To access the Printer Information screen, press F5 (Printer Overrides).
- To access the Advanced Options screen, press F8 (Advanced Options).

2.6.5 Indicate the Printer Information

Figure 2–5 Printer Information screen

```

96001D                               Plan the Upgrade
                                   Printer Information

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

The following information will be used to determine how to print
the reports created by the upgrade process.

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

Override Print Options . . . . . 0
Output Queue . . . . . QPRINT

Width of Form. . . . . 132
Length of Your Form. . . . . 68
Overflow Line. . . . . 62
Characters Per Inch. . . . . 15
Lines per Ince . . . . . 8
Form Type. . . . . *STD
Number of Copies . . . . . 1

                                   F12 or Enter=Previous      F24=More Keys

```

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

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

2.6.6 Select Advanced Options

Figure 2–6 Advanced Options screen

```

96001A                               Plan the Upgrade
                                   Advanced Options

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

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

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

Hold on Print Queue. . . . . 0

Run Control File Conversion. . . . . 1
Update Data Dictionary Glossary. . . . . 1
User Defined Codes detail text update. . . . . 1

Double Byte Environment. . . . . 0
  Convert data to upper case . . . . . 0

                                   F12 Or Enter=Previous      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

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.

2.6.7 Designate the Data Dictionary Field Ownership Information

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

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

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

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

Figure 2–7 Data Dictionary Field Ownership screen

```

96001F                                Plan the Upgrade                                Screen 3 of 3
                                Data Dictionary Field Ownership

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

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

                                F12=Previous Screen    F24=Move Keys

```

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

Press Enter.

2.6.8 Validate Your Upgrade Plan

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

MULTI-PLANS: You must validate each plan.

Create the validation reports

1. Be sure you are signed on as JDEINSTAL.
2. From the Software Upgrade Menu (A97JDE), select Print Upgrade Validation Report. A Processing Options Revisions screen appears.

Figure 2–8 Processing Options Revisions screen

The screenshot shows a terminal window titled "Processing Options Revisions". At the top left is the number "98312". To the right, it says "Form ID. . . . P96004YR", "Version. . . . ZJDE0001", and "Display Level. . .". Below this is the title "ZJDE - Upgrade Planner Validation Report". A message states: "This job has various options described below. Enter the desired values and press Enter to continue." There are four input fields with labels: "Environment Name to Validate" (containing "YOUR PLAN NAME"), "Enter 1-If this is a first time install 0-If you are upgrading" (containing "0"), "Enter 1-to check for duplicate objects 0-to not check for duplicates" (containing "1"), and "Upgrade type - *INSTALL, *REINSTALL, *UPD, *ALT" (containing "*UPD"). At the bottom, it says "F5=Printer Overrides".

3. Enter the appropriate information in the processing option fields. Specify in the first field an upgrade plan name.
Specify 0 in the second field and 1 in the third field, which indicates you want a report created that checks for duplicate files. Specify *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.

Figure 2–9 Upgrade Planner Validation Report, part 1

The Following Report Distributions were Entered:
** None Selected **

Plan Name	User ID	Plan Name	ERROR CODES
UPGRADE	JDEINSTAL	Upgrade	
Plan Libraries		Current JDE Release Level. A73	
		New JDE Release Level. A93	
		Production LSF Library.	
		Install Source Library. 1	
		Install Object/Data Libraries. 1	
		Type Library Name Library Description	
		COM CLTCRT CLIENT'S COMMON LIBRARY	
		DTA CLTDRT CLIENT'S DATA LIBRARY	
		SEC JDEUSERS CLIENT'S SECURITY LIBRARY	
		JDF JDFDRT JDE DATA LIBRARY	
		OBJ JDFORT JDE OBJECT LIBRARY	
		SRC JDFSRT JDE SOURCE LIBRARY	
		Library Name	
		ZCLTCRT	3733,
		ZCLDRT	3733,
Conversion Library Existence			
UPGRADE	JDEINSTAL	Upgrade Planner Validation Report - ZJDE	Page - . . . 2
Plan Libraries		ZJDE Environment	Date - . . . 11/29/11
		Plan Name	ERROR CODES
		Upgrade	
		Data Dictionary Merge (F9200--F9205) . . . 2	
		Vocabulary Overrides Merge (F9220) . . . 2	
		DREAM Writer Merge (F98301) 2	
		Menu Master Merge (F0082) 2	
		User Defined Codes Merge (F0004,F0005) . . . 2	
		Generic Messages/Rates Merge (F0019) . . . 2	
		Help Master Merge (F98HELP) 3	
		Software Versions Repository Merge . . . 2	
		Generic Text Keys Merge. 2	
		Auto Acct Instructions Merge 2	
		Next Numbers Merge 2	
		Data D/vocab override Rebuild. 0	
		Data Dictionary Library. CLTCRT	
		Vocabulary Overrides CLTCRT	
		DREAM Writer CLTCRT	
		Menu Master CLTCRT	
		User Defined Codes CLDRT	3142,
		Generic Messages/Rates CLDRT	3142,
		Help Master. CLTCRT	
		Software Versions Repository CLTCRT	
		Generic Text Library CLTCRT	
		Auto Acct Instructions Files CLDRT	
		Next Numbers Files CLTCRT	
		Override Print Options 0	
		Output Queue QPRINT	
		Width of Your Form 132	
		Length of Your Form. 68	
		Overflow Line. 62	
		Characters per Inch. 15	
		Lines per Inch 8	
		Form Type. *STD	
		Number of Copies 1	
		Hold on Print Queue. 0	
		Run Control File Conversion. 1	
		Update Data Dictionary Glossary. 1	
		User Defined Codes Text Flag 1	
		Delete Obsolete Menus. 0	
		Double Byte Environment. 0	
		Convert Data to Upper Case.	
(Total Errors = 004)			
(Warnings = 000)			

Figure 2–10 Upgrade Planner Validation Report, part 2

Plan Name	User ID	Plan Name	ERROR CODES
UPGRADE	JDEINSTAL	Upgrade	
	3142	CAUSE . . . ERROR: File does not exist in this library.	
		RESOLUTION. . The named file does not exist in this library. To determine the location of a specific file, the following IBM command should be used:	
		WRKOBJ OBJ(*ALL/'file name') OBJTYPE(*FILE)	
		NOTE - when entering the file name, do not include the single quotes (').	
	3733	cause.....ERROR: The work library exists from a previous upgrade.	
		Resolution...Display the library to review the contents. If the library is empty you must delete it. If not, contact Technical Response Line before continuing with the upgrade.	

The Duplicate Files Found Report

The report (R97281) identifies any duplicate files in the environment you ran the report against. This report will be created when you create the Upgrade Planner Validation Report. If you set the processing option for the Upgrade Planner Validation Report to check for duplicate files, the report will list the file and the library in which the duplicate was found for each duplicate file, or it will indicate "NO DUPLICATE FILES FOUND."

You 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.

Figure 2-11 Duplicate Files Found Report

97281			J.D Edwards & Company	Page - 1
			Duplicate Files Found Report	Date - 11/29/11
			Plan Name . . . UPGRADE	Time - 18:48:04
object	object	object		
F0002	CLTCRT	*FILE	Next Numbers - Automatic	
F0002	CLTCRT	*FILE	Next Numbers - Automatic	
F0003	CLTCRT	*FILE	Action Code Security	
F0003	CLTCRT	*FILE	Action Code Security	
F0101	CLTCRT	*FILE	Address Book Master	
F0101	CLTCRT	*FILE	Address Book Master	

The DD Field Ownership Report

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

2.7 Start the Upgrade and Track Progress

2.7.1 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.

2.7.2 Start the Upgrade

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

Figure 2-12 JDE Upgrade Command screen

JDE Upgrade Command (JDEUPGRADE)

Type choices, press Enter.

Upgrade Type > *UPD

Upgrade Plan Name > 'YOUR PLAN'

+ for more values

Source Media > *SAVE

Current JDE Release Level > A93

New JDE Release Level > A93PC00001

Run Validator Program 1

Product Library JDEA9301

Update Library A93PC00001

Update Step Option 0

*UPD,*INSTALL *REINSTALL,*ALT

From Upgrade Planner

Device Name,*SAVF,*DISK

From Upgrade Planner

From Upgrade Planner

1=Yes,0=No

Library Name

*NONE, Library Name

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 A93.
- 6. In the New JDE Release Level field, type A93PC00001 for Single Byte or A93PC000X1 for Double Byte and press Enter.

This release level must match the current 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 JDEA9301 for Single Byte or JDXA9301 for Double Byte.
9. In the Update Library field, type A93PC00001 for Single Byte or A93PC000X1 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.

2.7.3 Track the Progress of the Upgrade

The first part of the upgrade process (PTF_STEP1) restores the software from the save files in library JDEA9301 for Single Byte or JDEA93X1 for Double Byte and sends you messages as it restores the object, data, and source files to the PTF library (A93PC00001 for Single Byte or A93PC000X1 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.

Note: JDE and JDEPROD job descriptions are changed in Step 2 to the libraries in the Upgrade plan. You should not be using JDE or JDEPROD as the job description for other user profiles.

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

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.

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 will not be deleted. They are extremely useful for resolving upgrade issues.

The PTF_STEP1 joblog shows what happened during the DVD or Save File restore portion of the upgrade process. The PTF_STEP2 job logs show what happened during file conversions and merges.

2.7.4 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 PTF_STEP2 Completed appears for each plan.

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

Figure 2–13 File Conversion Status Inquiry screen

972613 File Conversion Status Inquiry

Plan Name . . . _____
 Library Name . . . _____
 Conversion Sts . . . _____
 Skip to File . . . _____

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

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

2. In the Plan Name field, type the name of the upgrade plan for which you want to check file conversion status.
3. In the Library Name field, type the name of your common library.
4. In the Conversion Sts field, enter CA (Completed Abnormally).
5. To display the job log for a file conversion listed on this screen, in the OP (Option) field next to a file conversion job, enter 1 (Display the job log).
6. Repeat steps 3 through 5 for your data and security libraries.
 - 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 Control Files

This chapter contains these topics:

- [Section 3.1, "Overview,"](#)
- [Section 3.2, "Sign on with a User that Accesses the Environment to Update,"](#)
- [Section 3.3, "Create New Files,"](#)
- [Section 3.4, "Optional Files,"](#)
- [Section 3.5, "Run the Menu Comparison Report,"](#)
- [Section 3.6, "Print Menu, User Defined Code, and New Automatic Accounting Instruction \(AAI\) Reports,"](#)
- [Section 3.7, "Update the Data Dictionary Files Using Data Dictionary Workbench,"](#)
- [Section 3.8, "Create/Print ASI Report/Apply ASIs/DREAM Writer Workbench,"](#)

3.1 Overview

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

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

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

3.3 Create New Files

3.3.1 Build New Files List Report

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

Figure 3–1 Post Upgrade menu

G97R4	Oracle	JDEWDS1
Post Upgrade Menu		
<pre> ... UPDATE APPLICATIONS 2. Print Upgrade Reports 3. Control File Updates 4. Create ASI Report 5. Print ASIs 6. Work With Instructions(ASIs) 7. DREAM Writer Review Workbench ... CREATE FILES/RUN JOBS 14. Build New Files List 15. Create New Files 16. Rebuild Menu Word Search 17. Run Special Application Jobs ... REVIEW REPORTS/STARTUP 23. Utilities 24. Start JDE Subsystems </pre>		
Selection or command ==> _____		
Tue, Dec 27, 2011 7:38:00am	JDE World A9.3 Production Copyright © 2011, Oracle.	SEC9193 QPADEV00R3

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.

3.3.2 Create New Files

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

Note: Files which have an entry in the 97/NF UDC file are not created during this process.

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

```

97453
Create New Files
File Count . . .

Plan Name . . . . .
Rpt System Code . . . . .
File Type (PF/PFS/LF/*) . . . . .
Com/Data/*ALL (C/D/*) . . . . .
From Library. . . . . Source Library. . . . .
Create In Library . . . . .

Opt File Name Sys Typ Com Data Description

```

- 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.

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

Figure 3–3 List of Recommended Files to be Created

Opt	File Name	Sys	Typ	Com	Data	Description
	F00A10	00A	PF	N	N	Approvals Rule Set Calculation File
	F00A10LA	00A	LF	N	N	LF - RCNM, APPT
	F00A11JA	00A	LF	N	N	JF - Approvals Transaction (F00A11, F00A
	F00A11JB	00A	LF	N	N	JF - Approvals Transaction (F00A11, F061
	F00A111	00A	PF	N	N	Approvals Transaction Header Tracking Fi
	F00A12LB	00A	LF	N	N	LF - Approval Request Status
	F00A12LC	00A	LF	N	N	LF - Transaction Number
	F00A15	00A	PF	N	N	Approval Request Detail File
	F00A16	00A	PF	N	N	Approval Request Additional Information
	F00A17IL	00A	PF	N	Y	Approval Rule Set File - Initial Load (D
	F00A21T	00A	PF	N	N	Approvals Management Constants File (Tag
	F00BLOG	00	PF	N	N	Error Log Table for Batch Processes

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 production 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.

3.4 Optional Files

Some new files for A9.3 Update 1 were not created during the Create New Files process. The files that are optional are listed in User Defined Code 97NF. Use option 4 (User Defined Codes) on menu G97R6 to inquire on UDC 97NF. F21 from the User Defined Codes screen takes you to DREAM Writer P0005P versions list. Copy the XJDE0001 version and change Data Selection to be Product Code EQ 97 and User Defined Codes EQ NF. Execute the DREAM Writer and a report (R0005P) is generated. In the Description field on the report is a short explanation of when the file is needed. If you determine you need the file, you can use the CRTDUPOBJ command to duplicate the file from the JDF type library in your plan to your data library. Not all of the values in UDC 97NF are new for A9.3 Update 1 so you may already have some of the files in your alternate data library from previous upgrades. Use the WRKOBJ command to determine if the file already exists in your data library.

Note: Not all files listed in the 97/NF UDC table exist in JDFDATA. Use the WRKOBJ command to determine if the file exists in JDFDATA before you attempt to duplicate it to your data library.

3.5 Run the Menu Comparison Report

During the upgrade, the following tasks are completed when the Menu Merge runs:

- 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 complete 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).

Figure 3–4 Menu Comparison Report, part 1

98312	Processing Options Revisions	Form ID. . . . +P98340
		Version/Histor 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.

+

F5=Printer Overrides

Figure 3–5 Menu Comparison Report, part 2

98312	Processing Options Revisions	Form ID. . . . +P98340
		Version/Histor ZJDE0001
Menu Comparison Report		Display Level. . .
This job has various options described below. Enter the desired values and press ENTER to continue.		
FROM/TO LIBRARIES: -		
3. Enter the JDFDATA library name.		
4. Enter your Production library name containing the Menu files.		
		+
F5=Printer Overrides		

Figure 3–6 Menu Comparison Report, part 3

98312	Processing Options Revisions	Form ID. . . . +P98340
		Version/Histor ZJDE0001
Menu Comparison Report		Display Level. . .
This job has various options described below. Enter the desired values and press ENTER to continue.		
BYPASS COMPARE/REPORT: -		
5. A difference in any of the fields listed below will cause the menu to print on the report. Enter a '1' to bypass printing the field on the report:		
Description		
Batch		
Highlight		
Help Instruction Key.		
Option Code		
Option Key.		
Version		
Run Time Message.		
Menu Mask		
		+
F5=Printer Overrides		

3. Enter the processing options with appropriate information:

- Processing Option one must have a '1'. If left blank, the G menus are deleted from your files
- For processing option 2, enter a blank and the system creates a Menu Comparison report (R98340). 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 make any custom changes such as menu masking.

Note: If you have custom G menus, they must be coded to systems 55-69 to be retained, if you enter a '1' in processing option 2. Custom menus that do not begin with 'G' are ignored regardless of system code.

During the Menu Merge, options were removed from your custom menus if that program is now obsolete and has no replacement program. Programs that are obsolete have a record in the F9806 file.

- 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 enter a '1' for processing option 2, 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.

3.6 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 appears.

1. In the User field, enter JDEINSTAL.
2. Print the following reports if they have not been printed already.

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

3.6.1 Update the Menu 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.

Figure 3–7 Menu Merge Exceptions report

97883A		J.D. Edwards & Company					Page - 1		
		Menu Merge Exceptions					Date - 11/22/11		
							Mode - Update		
FROM Library - JDFDRT									
TO Library - CLTCRT									
Menu Id	Menu Title	S1 No	Selection Description	Job to Execute	Option Key	Version	Message		
G00	General Systems	18	Business Values List cats	30060			New pgm for release		
G00VENDA	Buyer Self-Service - Stock		Enter Blanket orders	34311	P4311	WJDE0006	Cannot add sel to menu		
			Enter Quote orders	34311	P4311	WJDE0002	Cannot add sel to menu		
			Enter Requisitions	34311	P4311	WJDE0003	Cannot add sel to menu		
			Receipts by Purchase order	34312	P4312	WJDE0001	Cannot add sel to menu		
			Open Order Inquiry	3430301	P430301	WJDE0001	Cannot add sel to menu		
			Open Requisitions Inquiry	3430301	P430301	WJDE0002	Cannot add sel to menu		
			Open Quotes Inquiry	3430301	P430301	WJDE0003	Cannot add sel to menu		
			Blanket order Inquiry	3430301	P430301	WJDE0004	Cannot add sel to menu		
			Supplier Ledger Inquiry	3042003	P042003	WJDE0001	Cannot add sel to menu		
			Supplier Payment Inquiry	3042004	P042004	WJDE0001	Cannot add sel to menu		
			Supplier Item Summary	343230	P43230	WJDE0001	Cannot add sel to menu		
			Address Book	301051	P01051	WJDE0001	Cannot add sel to menu		
			Item Search	341200	P41200	WJDE0001	Cannot add sel to menu		
			Item Ledger - CARDEX	34111	P4111	WJDE0001	Cannot add sel to menu		
			Summary Availability	341202	P41202	WJDE0001	Cannot add sel to menu		
			Detail Availability	341023	P41023	WJDE0001	Cannot add sel to menu		
			Buyers Information	34115	P4115	WJDE0001	Cannot add sel to menu		
			Approval Review - PO	343080	P43080	WJDE0002	Cannot add sel to menu		
			Orders Awaiting Approval	343081	P43081	WJDE0002	Cannot add sel to menu		
			Requisitions Awaiting Approval	343081	P43081	WJDE0001	Cannot add sel to menu		
			Approval Review - Reqs	343080	P43080	WJDE0001	Cannot add sel to menu		
		G00VENDB	Buyer Self-Service - Stock		Test P42180	342180	P42180	STEPHEN	Cannot add sel to menu
					Enter Blanket orders	34311	P4311	WJDE0007	Cannot add sel to menu
					Enter Quote orders	34311	P4311	WJDE0012	Cannot add sel to menu
					Enter Requisitions	34311	P4311	WJDE0009	Cannot add sel to menu
					Receipts by Purchase order	34312	P4312	WJDE0005	Cannot add sel to menu
					Open Order Inquiry	3430301	P430301	WJDE0001	Cannot add sel to menu
					Open Requisitions Inquiry	3430301	P430301	WJDE0002	Cannot add sel to menu
					Open Quotes Inquiry	3430301	P430301	WJDE0003	Cannot add sel to menu
					Blanket order Inquiry	3430301	P430301	WJDE0004	Cannot add sel to menu
	Supplier Ledger Inquiry			3042003	P042003	WJDE0001	Cannot add sel to menu		
	Supplier Payment Inquiry			3042004	P042004	WJDE0001	Cannot add sel to menu		
	Supplier Item Summary			343230	P43230	WJDE0001	Cannot add sel to menu		
	Address Book			301051	P01051	WJDE0001	Cannot add sel to menu		
	Item Search			341200	P41200	WJDE0001	Cannot add sel to menu		
	Item Ledger - CARDEX			34111	P4111	WJDE0001	Cannot add sel to menu		
	Summary Availability			341202	P41202	WJDE0001	Cannot add sel to menu		
	Detail Availability			341023	P41023	WJDE0001	Cannot add sel to menu		
	Buyers Information			34115	P4115	WJDE0001	Cannot add sel to menu		
	Approval Review - PO			343080	P43080	WJDE0002	Cannot add sel to menu		
	Orders Awaiting Approval			343081	P43081	WJDE0002	Cannot add sel to menu		
	Requisitions Awaiting Approval			343081	P43081	WJDE0001	Cannot add sel to menu		
G00VENDC	Buyer Self-Service - Encumbran				Approval Review - Reqs	343080	P43080	WJDE0001	Cannot add sel to menu
					Supplier Payment Inquiry	3042004	P042004	WJDE0001	Cannot add sel to menu
					Address Book	301051	P01051	WJDE0001	Cannot add sel to menu
					Buyers Information	34115	P4115	WJDE0001	Cannot add sel to menu
					Approval Review - PO	343080	P43080	WJDE0002	Cannot add sel to menu
					Orders Awaiting Approval	343081	P43081	WJDE0002	Cannot add sel to menu
					Requisitions Awaiting Approval	343081	P43081	WJDE0001	Cannot add sel to menu
					Approval Review - Reqs	343080	P43080	WJDE0001	Cannot add sel to menu
				G00141	Payment Terms Revisions	21	Update A/R Vouchers	3005141	P005141
		22	Update A/R Invoices			3005142	P005142		New pgm for release
		08	Japanese Era Dates			30089			New pgm for release
		G00212	Japanese Consumption Tax						

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

3.6.2 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.

Figure 3–8 Copy DD, VO, DW, UDC, SVR, Menus screen

99630		Copy DD, VO, DW, UDC, SVR, Menus	
From Library	PGFDTA93	To Library	
Dictionary Item.		Language	Appl Ovr
			Scrn/Rpt
Vocabulary Overrides		Language	Appl Ovr
DREAM Writer Form.		Language	
User Def Codes Sys		Language	
Type.			
Software Versions Rep.			
Menu Identification.			
Generic Rate/Msg Sys			
Type.			
F24=More			

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

3.6.3 Update a Menu Selection

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

Figure 3–9 Menu Selections screen

Menu Selections				A	J	K	DP	E
00908	Action Code . . .	Menu Id. . .	Lock . . .					
	Menu Title . . .		Level of Displa . . .					
	Advanced/Tech. . .	Setup Menu . . .						
	Menu Class . . .	Product Code . . .						

	Selection. . . .	Description. . . .	Highlight. . . .	A	J	K	DP	E
	Job to Execute . . .	Batch. . . .						
	Menu to Execute. . .	Help Inst Key . . .	Sel Lock . . .					
	Option Code. . .	Option Key . . .	Version. . .					
	Appl Override. . .	Run Time Msg . . .	Cntry/Reg . . .					
	1.	13.						
	2.	14.						
	3.	15.						
	4.	16.						
	5.	17.						
	6.	18.						
	7.	19.						
	8.	20.						
	9.	21.						
	10.	22.						
	11.	23.						
	12.	24.						
F4=Skip To F5=Updt w/Redisplay F6=Browse F18=Security Review F9=Search								

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

3.6.4 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.

From the Control File Update menu (C07B6), select User Defined Codes.

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

3.6.6 Update the Automatic Accounting Instruction (AAI) Files

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

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

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

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

Note: Do not add AAI GR.

Figure 3–12 New Automatic Accounting Instructions (AAIs) report

98727				J.D. Edwards & Company New Automatic Acctg Insts(AAI)		Page - 1
						Date - 11/22/11
						From Libr - JDFDRT
						To Libr - CLTDRT
						Mode - Final
Item Number	Co	Sequence Number	Syst Code	Account Use Description		
CC	00000			Expense Account - PCards		
CCP	00000			Liability Account - PCards		
ADR	00000	3.000	03	Book differences between F0311 and F0911 distribution. Used by EURO Integrity - P03711.		
AER	00000	3.000	03	Book differences between F0311 and F0911 AE offset. Used by EURO Integrity - P03711.		
NC	00000	3.511	03	Netting Suspense Account		
RCVATD	00000	3.110	03	Accounts Receivable Tax Retention-deferred tax		
RC3015	00000	3.110	03	Accounts Receivable Class - Default if G/L Class code field is left blank. (Customer Master, Invoice Entry screens)		
ADP	00000	4.000	04	Book differences between F0411, F0414 and F0911 distribution. Used by EURO Integrity P04711 and P04712.		
AEP	00000	4.000	04	Book differences between F0411, F0414 and F0911 AE offset. Used by EURO Integrity P04711 and P04712.		
PXA901	00000	1.520	09	1099-MISC Direct Sales Beginning Range 1		
PXA902	00000	1.520	09	1099-MISC Direct Sales Ending Range 1		
PX0501	00000	1.520	09	1099-INT Investment Expenses Beginning Range 1		
PX1502	00000	1.520	09	1099-INT Investment Expenses Ending Range 1		
PX1601	00000	1.520	09	1099-Foreign Tax Paid Beginning Range 1		
PX1602	00000	1.520	09	1099-Foreign Tax Paid Ending Range 1		

3.6.7 Review and Update an AAI

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

Figure 3–13 Automatic Accounting Instructions screen

00121 Automatic Accounting Instr.

Skip to Sequence Number.

0 Sequence P Number	Company Bus. Unit	Object	Sub	Item
- Withholding SUSSEVT	67	6700 4581	SUSSEVT	\$\$A
- Withholding IIBB	67	6700 4581	IIBB	\$\$B
- Withholding Control	64	6400 4580		\$\$C
- Withholding Control	64	6400 4580		\$\$D
- Withholding Control	64	6400 4580		\$\$E
- Withholding Control	64			\$\$F

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

1. Press F15 (AAI Revisions).

Figure 3–14 Single AAI Revisions screen

0012 Single AAI Revisions

Action Code.

Item Number.

Company.

Sequence Number.

Product Code

Account Codes

Business Unit.

Object Account

Subsidiary

Option

-

-

-

Options:

0 = Optional

R = Required

N = Not Used

Account Use Description.

.

.

.

.

F21=Print Automatic Accounting Instructions F24=More Keys

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

3.7 Update the Data Dictionary Files Using Data Dictionary Workbench

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

upgrade. The user will apply a resolution code that applies the change to the Data Dictionary files.

Note: If all fields were set to 'J' on the DD Field Ownership screen used in the upgrade, you may bypass this section. The Data Dictionary Workbench file (F97806) is replaced each time you run an upgrade.

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.

Figure 3–15 Data Dictionary Workbench Initial screen

```

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

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

Enter the Upgrade Planner Environment
name (Example: ZJDE):                     YOUR PLAN NAME_____

                                         F5=Printer Overrides
  
```

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

Figure 3–16 Data Dictionary Workbench screen

97806		Data Dictionary Workbench		Plan Name. A9193	
Action Cd	I	DD Field	*	OR	*
Resolution	*	Original Value	*	OR	*
Data Item	*	New JDE Value	*		
Scrn/Rpt	*	Alias Type	*	Fld Alias	*
Appl Ovrrd	*	Language	*	From Lib.	JDFD9193 To Lib. DTA91

O	Rs	Data	DD	Current Value	Appl L
P	Cd	Item	Field		Ovr
-	AJ	#AUD	DVAL	*BLANK	
-	AJ	#AUD	ER01	1 ' '	
-	AJ	#AUD	ERUL	VALUE	
-	AJ	#CQ	CH1	Cumulative	
-	AJ	#CQ	CH2	Quantity	
-	AJ	#CQ	CH3	-----	
-	AJ	#CQ	DR01	M	
-	AJ	#CQ	DRUL	CODE	
-	AJ	#DIA	ER01	0 Q F B 1 2 3 4 ' '	
-	AJ	#DIA	ERUL	VALUE	
-	AJ	#EAS	CLAS		
-	AJ	#FQG	ER01	82	

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 A9.3 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.

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

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

The DREAM Writer data selection screen for Print Instructions (ASIs) appears. You will need to change the DREAM Writer data selection screen for ASI Report Instructions by System.

Figure 3–17 Create ASI Report screen

Paste clipboard contents starting at cursor position **Create ASI Report** Form ID. . . . P98490
Version/Histor ZJDE0002

ASI Report Instructions by System NUMERICS-DECIMAL POINTS ARE NOW ENTERED

I	Explanation	Rel.	Selection	Value
N				
Y	Release	E0	A93PC00001	
And Y	Product Code	E0	*ALL	
And Y	ASI Type	E0	*ALL	
And Y	Priority	E0	*ALL	
And Y	ASI Parameter	E0	*ALL	
And Y	Menu Job to Execute	E0	*ALL	
And Y	SAR Number	E0	*ALL	

... F4=Extra Data ... F5=Updt w/Redisplay ... F16=Display All Data Fields ...

1. Change the Release value to A93PC00001 for Single Byte or A93PC000X1 for Double Byte and press Enter.

3.8.1 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:

Number	Description
R98490	ASI Report

3.8.2 Work with Application Specific Instructions (ASIs)

Display the ASIs

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

Figure 3–18 Work with Instructions (ASIs) screen

98292 **Work With Instructions(ASIs)**

Reporting System Release . . . A93
Types. New Software Library (From) . . . JDFD9193
ASI Status Selection Current Common Data Library(To) . . . DTA91
Current World Writer Library(To) . . .

O	SY	Type	Item	Last Updated
P	CD			
00		Automatic Accounting Insts	00000	
00		DREAM Writer	P00151	
00		User Defined Codes	00DI	
00		User Defined Codes	00DT	
00		User Defined Codes	00IO	
01		User Defined Codes	01HL	
04		Special Instructions	F04581	
04		DREAM Writer	P041015	
04		DREAM Writer	P04514CMP	
04		DREAM Writer	XT0413	
04		User Defined Codes	00BT	
04		User Defined Codes	04PP	
07		Special Instructions	F06723	
07		User Defined Codes	07J	
07		User Defined Codes	07M	
07		User Defined Codes	07NA	

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

1. In the Release field, type A93PC00001 for Single Byte or A93PC000X1 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 should update any other versions that are based on that version also.
- If you need to update secured DEMO DREAM Writer versions, you must unsecure them first by using the Report Version Security selection from the Security Advanced and Technical Ops menu (G9431).

The DEMO user profile must exist on the IBM side and in the F0092 file in the A9.3 Update 1 environment. Use option 6 on menu G9401 if you need to set up the DEMO profile in the A9.3 Update 1 environment.

Put D (DREAM Writer), F (FASTR), or S (STAR) in the Report Writer Type field; DEMO in the Version Owner field; * in the Form ID field and '0' in the User Exclusive field.

After all ASI changes are complete, if you want to re secure the versions, do the same steps except put a '1' in the User Exclusive field.

- The Last Change User ID on versions you update will change to the ID of the user who makes the changes. The original owner will not be changed, for example DEMO.

Note: Some of the ASIs may 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 appears.

Figure 3–19 ASI Inquiry/Update screen

98291	ASI Inquiry/Update	A81
Ty / Item. DW / PUIRFEI Priority 1		
<hr/>		
DREAM Writers		
Form ID: PUIRFEI		Version Number: ZJDE0001
		Procedure: Change
Reason: Change values for processing options 1 and 2.		
From the Processing Options Revisions screen:		
PROCESSING OPTION NUMBER		NEW VALUE
1		ZJDE0004
2		ZJDE0001
Enter=Go to Next ASI F6=Copy New to Prod F10=Chg Prod F11=View New F24=More		

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

- Copy the item affected by this ASI in its entirety from the JD Edwards World data library to your production data library, or
- Update specific data associated with the item according to information contained in the ASI.

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

To copy the item in its entirety (F6).

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

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

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

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

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

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

4. Additional Special Instruction:

- CPYF FROMFILE(templib/F74R0411) TOFILE(dtalib/F74R0411) MBROPT(*REPLACE) FMTOPT(*NOCHK).

Templib is the library you created in Section 2.5.

- Add P4111 as a value to the 00/IE UDC table. Description is Item Ledger Inquiry and Hard Coded (F4) should be 'Y'.

3.8.3 Use the DREAM Writer Review Workbench

The DREAM Writer Review Workbench (contained in files F9835, F9836, F98361, F983610, and F9837) allows you to review changes the DREAM Writer merge made to many of your versions.

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

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

Note: You must have proper authority to use the DREAM Writer Review Workbench. Otherwise, you will receive a security error when you attempt to change a version. To unsecure a Form ID and its associated versions, select Report Version Security on the Advanced and Technical Ops menu (G9431).

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

Figure 3-20 DREAM Writer Review Workbench screen

```

98351                                DREAM Writer Review Workbench    Review Type. . *
                                     Product Code . . .

Skip To Form ID. . .

O      Form      Description
P      ID
- P09410      T/B by Business Unit Report
- P09800      Post General Ledger

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.

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

Figure 3-21 DREAM Writer Version Review screen

```

98352                                DREAM Writer Version Review    Form . . P09800
                                     Type . . *
                                     Mandatory Review

Skip to Version. . .

O      Version      Description
P      History
- TAMMY      General Ledger Post - General Accounting
- ZJDE0001   General Ledger Post - General Accounting
- ZJDE0002   General Ledger Post - Invoice Entry
- ZJDE0003   General Ledger Post - Voucher Entry
- ZJDE0004   General Ledger Post - Manual/Void Paymnt
- ZJDE0005   General Ledger Post - Cash Receipts
- ZJDE0006   General Ledger Post - Check Writer
- ZJDE0007   G/L Post - JIB Cost Allocations
- ZJDE0008   G/L Post - Allocations Journal
- ZJDE0009   G/L Post - JIB Invoices and Statements
- ZJDE0010   G/L Post - Revenue
- ZJDE0011   General Ledger Post - Inter Branch Sales
- ZJDE0012   General Ledger Post - ALRS Check Writer
- ZJDE0013   General Ledger Post - Time Billing
- ZJDE0014   General Ledger Post - UCIS

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

```

- 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).

Figure 3-22 DREAM Writer Review screen

```

9835      DREAM Writer Review
Form . . P09800      Version/ TAMMY
General Ledger Post - General Accounting

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

      1 Processing Options

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

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

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

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

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

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

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

Go to the Next Phase

Phase Four - Run Special Application Jobs

This chapter contains these topics:

- Section 4.1, "Sign On as a User ID that Accesses the Environment to Update,"
- Section 4.2, "Access the Post Upgrade Menu,"
- Section 4.3, "Rebuild Menu Word Search,"
- Section 4.4, "Run Special Application Jobs,"
- Section 4.5, "Activate Triggers,"
- Section 4.6, "Rebuild DD/VO."

4.1 Sign On as a User ID that Accesses the Environment to Update

4.2 Access the Post Upgrade Menu

From any JD Edwards World menu, enter G97R4.

Figure 4–1 *Post Upgrade Menu screen*

G97R4	Oracle	JDEWDS1
Post Upgrade Menu		
<div style="display: flex; justify-content: space-between;"> <div> <p>... UPDATE APPLICATIONS</p> <p>2. Print Upgrade Reports</p> <p>3. Control File Updates</p> <p>4. Create ASI Report</p> <p>5. Print ASIs</p> <p>6. Work With Instructions(ASIs)</p> <p>7. DREAM Writer Review Workbench</p> </div> <div> <p>... CREATE FILES/RUN JOBS</p> <p>14. Build New Files List</p> <p>15. Create New Files</p> <p>16. Rebuild Menu Word Search</p> <p>17. Run Special Application Jobs</p> </div> </div>		
<div style="display: flex; justify-content: flex-end;"> <p>... REVIEW REPORTS/STARTUP</p> <p>23. Utilities</p> <p>24. Start JDE Subsystems</p> </div>		
<p>Selection or command</p> <p>===> _____</p>		
<p>Tue, Dec 27, 2011 ...</p> <p>7:54:16am</p>	<p>JDE World A9.3 Production</p> <p>Copyright © 2011, Oracle.</p>	<p>SEC9193</p> <p>QPADEV00R3</p>

4.3 Rebuild Menu Word Search

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

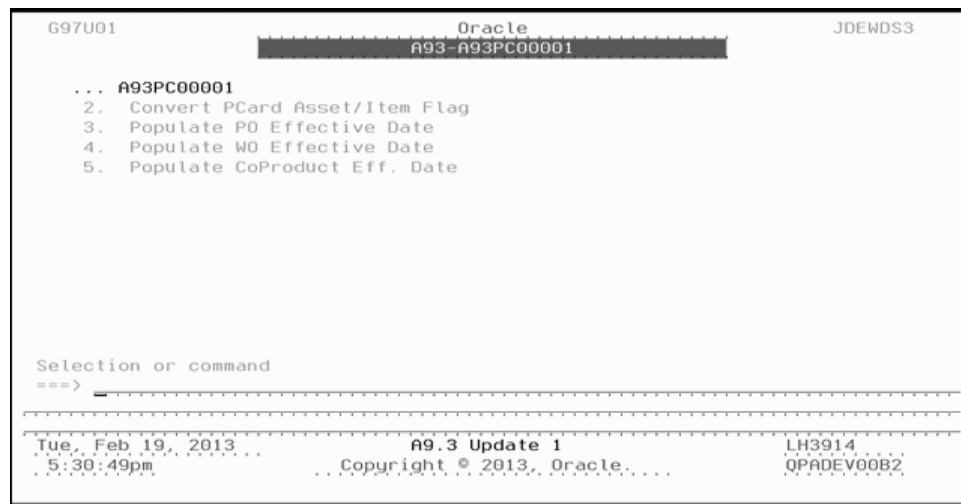
The job submits to batch.

4.4 Run Special Application Jobs

1. Type G97U01 on the command line.

The A9.3 Update 1 Special Jobs Menu displays.

Figure 4–2 A9.3 Update 1 Special Jobs menu



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

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

4.5 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.

4.6 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.

Figure 4-3 Rebuild DD/VO screen

0021JQ	Rebuild DD/VO
<p>This procedure updates the Video/Report text which is associated with Data Dictionary data elements and does not have text overrides. It also updates the field descriptions in the Dream Writer Select and Sequencing records.</p>	
Data Dict. Library (F9200) . . .	_____
Vocab. Ovr File Library(F9220) .	_____
Dream Writer File Library(F98301)	_____
<p>Warning: This procedure should not be run when application users are signed on. All Videos and Reports will be impacted.</p>	
ENTER - Update Video/Report/File Text F3=Exit w/o Update F24=More Keys	

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

Go to the Next Phase

Phase Five - Post Upgrade Tasks

This chapter contains these topics:

- [Section 5.1, "Overview,"](#)
- [Section 5.2, "Access the Post Upgrade Menu,"](#)
- [Section 5.3, "Work with 'Z' Libraries,"](#)
- [Section 5.4, "Sign on as JDEINSTAL to Access the Software Upgrade Menu,"](#)
- [Section 5.5, "Print the Conversion Status Report,"](#)
- [Section 5.6, "Review the Upgrade Reports,"](#)
- [Section 5.7, "Sign off as JDEINSTAL,"](#)
- [Section 5.8, "Sign on as a User That Accesses the Alternate Environment,"](#)
- [Section 5.9, "End the JD Edwards World Monitor,"](#)
- [Section 5.10, "Install A9.3.1 Group Software Update 1,"](#)
- [Section 5.11, "Test in the Alternate Environment."](#)

5.1 Overview

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

5.2 Access the Post Upgrade Menu

From any JD Edwards World menu, enter G97R4.

5.3 Work with 'Z' Libraries

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

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

1. From the Post Upgrade Menu (G97R4), select Utilities.
2. From the Upgrade Utilities menu (G97R42), select Work with 'Z' Libraries.

3. In the Library field on the Work with 'Z' Libraries screen, enter Z*. The 'Z' libraries are listed.
4. To view the contents of a library, enter a 5 (Display) in the Opt field next to the library name.
5. If the library is empty, from the Work with 'Z' Libraries screen, enter 4 (Delete) in the option field next to the library.

5.4 Sign on as JDEINSTAL to Access the Software Upgrade Menu

Figure 5–1 Software Upgrade Menu screen

A97JDE		JD Edwards World Software Upgrade Menu		JDEWDS1
Plan The Upgrade		Upgrade Utilities		
2. Work with Upgrade Planner		14. Print ASI Report		
3. Print Upgrade Validation Report				
4. Stop JDE Subsystems				
Upgrade The Software		File Conversion Utilities		
7. Change Messages to Break Mode		20. Inquire on Conversion Status		
8. Start the Upgrade		21. Conversion Status Report		
		22. Conversion Schedule Report		
New Installations				
11. World Express Install				
90. Signoff				
Selection or command ==> _				
Enter	F3=Exit	F4=Prompt	F6=Messages	F9=Retrieve
F10=Command entry	F14=Submitted jobs	F18=Spooled Files	Help(Alt-F1)	
Copyright© 1990,2011 Oracle.				

5.5 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 appears for form ID P972612.
2. In the O (Option) field next to version ZJDE0001, enter 3 (Add).
3. Press Enter until the Data Selection screen appears.
4. In the Value field for Plan Name, type the name of the upgrade plan that defines the environment for which you want to run the report.
5. Press Enter until the Version Selection screen appears again.
6. In the O (Option) field next to the version you created, enter 1 (Run).
7. When the job finishes, print the report.

5.6 Review the Upgrade Reports

After you complete Phase Four, you can review the various reports the system produced. Sign on as JDEINSTAL and type WRKSBMJOB. You may print the reports found under PTF_STEP2.

5.7 Sign off as JDEINSTAL

5.8 Sign on as a User That Accesses the Alternate Environment

5.9 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.

5.10 Install A9.3.1 Group Software Update 1

Install either A9311 (Single Byte) or D9311 (Double Byte) to the alternate environment.

Make sure to include your JDFDATA library on the Configuration screen when you install A9311 or D9311.

Note: A9311 is the first Group Software Update for A9.3.1. You will install the Group Software Update that is generally available on the Update Center when you perform the A9.3.1 Upgrade.

5.11 Test in the Alternate Environment

You can operate your alternate environment at release level A9.3 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 the Production Environment

This chapter contains these topics:

- [Section 6.1, "Overview,"](#)
- [Section 6.2, "Pre-Upgrade Application and Technical Instructions for the A9.3 Production Environment,"](#)
- [Section 6.3, "Sign on as JDEINSTAL to Access the Software Upgrade Menu,"](#)
- [Section 6.4, "Start the Upgrade and Track Progress,"](#)
- [Section 6.5, "Update Your Applications,"](#)
- [Section 6.6, "Run Special Application Jobs, and Perform Post Upgrade Tasks, Upgrade Reports,"](#)
- [Section 6.7, "Start JD Edwards World Subsystems,"](#)
- [Section 6.8, "End the JD Edwards World Monitor,"](#)
- [Section 6.9, "Activate Triggers."](#)
- [Section 6.10, "Install A9.3.1 Group Software Update 1."](#)

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

6.1 Overview

This phase details all steps needed to upgrade your A9.3 production environment to A9.3 Update 1 ONLY.

If your production environment is A9.3, continue with the Pre Upgrade Application and Technical Instructions step and the remainder of Phase 6 of this guide.

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

6.2 Pre-Upgrade Application and Technical Instructions for the A9.3 Production Environment

6.2.1 Run Integrity Reports

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

6.2.2 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.

6.2.3 Contract Billing and Service Billing

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

6.2.4 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.

6.2.5 IBM Journaling

IBM Journaling must be turned off on files that are part of the upgrade plan before you start the A9.3 Update 1 upgrade.

6.2.6 Database Audit Manager and Other Triggers

Deactivate Triggers in Database Audit Manager. Access 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, Deactivate All Configurations, on menu G946, you can use this option.

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

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

6.2.7 Delete Files

1. DLTF FILE(dtalib/F74R0430L*) where dtalib is your data library.
2. DLTF FILE(dtalib/F74R0430).
3. DLTF FILE(dtalib/F74R0433).
4. CRTDUPOBJ OBJ(F74R0411) FROMLIB(dtalib) OBJTYPE(*FILE) TOLIB(templib) DATA(*YES)
5. DLTF FILE(dtalib/F74R0411).

6.3 Sign on as JDEINSTAL to Access the Software Upgrade Menu

Figure 6–1 Software Upgrade Menu screen

A97JDE	JD Edwards World Software Upgrade Menu	JDEWDS1
<div> <div>Plan The Upgrade</div> <div> 2. Work with Upgrade Planner 3. Print Upgrade Validation Report 4. Stop JDE Subsystems </div> </div> <div> <div>Upgrade Utilities</div> <div> 14. Print ASI Report </div> </div>		
<div> <div>Upgrade The Software</div> <div> 7. Change Messages to Break Mode 8. Start the Upgrade </div> </div> <div> <div>File Conversion Utilities</div> <div> 20. Inquire on Conversion Status 21. Conversion Status Report 22. Conversion Schedule Report </div> </div>		
<div> <div>New Installations</div> <div> 11. World Express Install </div> </div>		
90. Signoff		
Selection or command		
===> _____		
Enter	F3=Exit	F4=Prompt
F10=Command entry	F14=Submitted jobs	F6=Messages
Copyright© 1990,2011 Oracle.		F18=Spooled Files
		F9=Retrieve Help (Alt-F1)

6.3.1 Set Up an Upgrade Plan for the Production Environment

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 A9.3 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 A9.3 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.

6.3.2 Stop JD Edwards World Subsystems

6.3.3 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.

6.3.4 Order Processing (If Installed)

1. From the Stop JD Edwards World Subsystems menu (A97JDE2), select Order Processing (If Installed).
2. Enter the name of your Order Processing subsystem, and repeat this step for each additional subsystem you may have.

6.3.5 Human Resources (If Installed)

1. Be sure your Human Resources monitor has finished processing any history entries.
2. After processing completes, from the Stop JD Edwards World Subsystems menu (A97JDE2), select Human Resources Management (if installed).
3. Enter the name of your Human Resources subsystem, and repeat this step for each additional subsystem you may have.

6.3.6 Back Up Libraries

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

6.3.7 Be Sure Users are Not Accessing the Libraries You Want to Upgrade

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

1. On the command entry line, type WRKOBJLCK, then press F4 (Prompt).
The Work with Object Locks screen appears.
2. In the Object field, type the production data library name.
3. In the Library field, type QSYS.
4. In the Object Type field, enter *LIB.
5. Repeat for each library you want to upgrade.

6.4 Start the Upgrade and Track Progress

6.4.1 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 A93.
8. In the New JDE Release Level field, type A93PC00001 for Single Byte or A93PC000X1 for Double Byte and press Enter.

This release level must match the new JD Edwards World release level specified in the upgrade plan.
9. Leave the Run Validator program field set to 1.
10. In the Product Library field, type JDEA9301 for Single Byte or JDXA9301 for Double Byte.
11. In the Update Library field, type A93PC00001 for Single Byte or A93PC000X1 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.

6.4.2 Track the Progress of the Upgrade

The first part of the upgrade process (PTF_STEP1) restores the software from the save files in library JDEA9301 for Single Byte or JDXA9301 for Double Byte and sends you messages as it restores the object, data, and source files to the PTF library (A93PC00001 or A93PC000X1). 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.

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).

6.4.3 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.

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 PTF_STEP2 Completed appears for each plan where name is the name of the plan.

6.4.4 Create New Files

See [Section 3.3, "Create New Files."](#) You must create new files in the common and data libraries in your production environment.

6.5 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, F98310, F98311, F98312, F9835, F9836, F98361, F983610, F9837
User Defined Codes	F0004, F0004D, F0005, F0005D
Software Versions Repository	F9801, F9802
Vocabulary Overrides	F9220, F9601, F9601D, F9611, F9620, F9621
World Writer	F8201, F8202, 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 A9.3 Update 1 Special Instructions ASIs also need to be completed.

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

For system 12 - F12603 through F12609

For system 83 - F8303 through F8309

You must have used the dual maintenance method of monitoring DREAM Writer, FASTR, and STAR changes as described in Phase One. See the IMPORTANT NOTE in [Section 1.1.4, "Monitor Changes to JD Edwards World Control Files."](#)

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, print the Menu Merge reports (R97883A, R97883B) and update menus if required.
- 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 any ASIs pertaining to the control files you could not copy.

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

- Additional Special Instruction:
CPYF FROMFILE(templib/F74R0411) TOFILE(dtalib/F74R0411) MBROPT (*REPLACE) FMTOPT(*NOCHK).
Templib is the library you created.
- Review the DREAM Writer (DW) Review Workbench only if you were unable to copy the DW files.

6.6 Run Special Application Jobs, and Perform Post Upgrade Tasks, 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.

6.7 Start JD Edwards World Subsystems

6.7.1 Order Processing (If Installed)

1. From the Post Upgrade Menu (G97R4), select Start JD Edwards World Subsystems.
2. From the System Specific Startup menu, select Start Subsystem under ORDER PROCESSING.
3. Enter the name of your Order Processing subsystem, and repeat this step for each additional subsystem you may have.

6.7.2 Human Resources (If Installed)

1. From the System Specific Startup menu (G97R7), select Start Subsystem & Monitor under HUMAN RESOURCES MANAGEMENT.
2. Enter the name of your Human Resources subsystem, and repeat this step for each additional subsystem you may have.

6.7.3 Start the JD Edwards World Sleeper Subsystem

While signed on as the Security Administrator, start the sleeper subsystem.

6.8 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.

6.9 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 PRTRGPGM report or the query report produced by Step 2 of the upgrade, you can reattach those triggers to your files in the production environment.

6.10 Install A9.3.1 Group Software Update 1

Install either A9311 (Single Byte) or D9311 (Double Byte) to the production environment. Include your JDFDATA on the Configuration screen of the Software Update install.

Note: A9311 is the first Group Software Update for A9.3.1. You will install the Group Software Update that is generally available on the Update Center.

Control File Dependencies

This appendix contains the topic:

- [Section A.1, "Control File Sets."](#)

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.

A.1 Control File Sets

A.1.1 User Security

- F0092 User Information
 - F0092T Library Lists User Tag
- F00921 User Display Preferences
 - F00921T User Display Preference Tag
- F0093 Library List Control
 - F0093T Library List Control Tag
- F0094 Library List Master Files
 - F00944 Library List Master File - Additional Libraries
- F00926 Role File
 - F009261 Role/User File
 - F009262 Role/Group File
 - F009264 Role/Library List File

A.1.2 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

F98310 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

A.1.3 Data Dictionary

If you are currently at release A7.3:

F9200 Data Item Master
F9201 Data Field Specs
F9202 Data Field Display Text
F9203 Data Item Alpha Descriptions
F9204 Data Item Aliases
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

A.1.4 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

A.1.5 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)

A.1.6 Software Versions Repository

F9801 Software Versions Repository Master

F98012 SVR Member Category Codes
F98013 SVR Member Parm/Key List
F9802 Software Versions Repository Detail

A.1.7 Generic Message/Rates Files

F0019 Generic Message/Rates Types
F00191 Generic Message Rates
F00192 Generic Message Detail

A.1.8 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

A.1.9 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)

Upgrade Planner Screens

This appendix contains these topics:

- [Section B.1, "Plan the Upgrade Screen,"](#)
- [Section B.2, "Libraries for this Plan Screen,"](#)
- [Section B.3, "Merge Information Screen,"](#)
- [Section B.4, "Printer Information Screen,"](#)
- [Section B.5, "Advanced Options Screen."](#)

This appendix describes the upgrade planner screens and their fields.

B.1 Plan the Upgrade Screen

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

Figure B–1 Plan the Upgrade screen

```
960099          Plan the Upgrade

Action Code. . . I

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

Enter the name of a Plan.

You can choose one of the following or copy them
to create your own plan. Note that "ZJDE" Plans
cannot be changed or deleted.

We recommend you review the following:

      ZJDE      - Simple production plan
      ZJDE_ALT - Alternate upgrade plan

      ** Press F5 key to enter Upgrade Data **

F3=Exit      F5=Plan Data
```

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.
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.

B.2 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.

Figure B–2 Libraries for This Plan screen

```

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

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

Specify all libraries for the plan that contain J.D. Edwards
files and programs. Exclude IBM libraries such as OGPL and QTEMP.
Specify current software release level and the release to upgrade to.
Current JDE Release Level. . . . . A93
New JDE Release Level. . . . . A93PC00001
Production LSF Library . . . . .
Install Source Library . . . . . (1=Yes, 0=No)
Install Object/Data Libraries. . . . .

Lib   Library      Library
Typ   Name        Description
COM   ALTCOM      CLIENT'S ALT COMMON LIBRARY
DTA   ALTDTA      CLIENT'S ALT DATA LIBRARY
SEC   ALTSEC      CLIENT'S ALT SECURITY LIBRARY
JDE   JDEDTAALT   JDE DATA LIBRARY (ALTERNATE)
OBJ   JDEOBJALT   JDE OBJECT LIBRARY (ALTERNATE)
SRC   JDESRCAIT   JDE SOURCE LIBRARY (ALTERNATE)

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

```

The following table explains the fields on this screen.

Field	Explanation
Current JD Edwards World Release Level	Specify the current JD Edwards World software release level of the environment you want to upgrade. Note: Do not type more than three characters in this field.
New JD Edwards World Release Level	Specify the JD Edwards World software release level to which you want to upgrade your environment (for example, A93).
Production LSF Library	Specify the Production Object library name containing the F99LSF file.
Install Source Library	Specify whether you want the JD Edwards World source code library (usually JDFSRC) restored. Valid values are: 0 – Do not restore the source code library. 1 – Restore the source code library.
Install Object/Data Libraries	Specify whether you want the JD Edwards World object and data libraries (usually JDFOBJ and JDFDATA) restored. Valid values are: 0 – Do not restore the object and data libraries. 1 – Restore the object and data libraries.
Lib Typ (Library Type)	Specify the type of library. Valid values are: COM – Common Library CSO – Custom Object CSS – Custom Source DTA – Client's Data Library JDF – JD Edwards World Data Library KBG – CASE Constants Library OBJ – JD Edwards World Object Library SEC – Security Library SRC – JD Edwards World Source Library Note: Do not create new library types, which will cause unpredictable results. In addition, do not specify more than one library for JDF, OBJ, SEC, and SRC library types. Data libraries contain JD Edwards World data files, such as Address Book. The common library holds JD Edwards World control files, such as menu and DREAM Writer files.
Library Name	Specify the name of a library for this environment. Note: If you are setting up your own upgrade plans for multiple environments that have separate object libraries, each environment plan must have separate sets of security files (F0092, F0093, F0094, and F0095). JD Edwards World recommends you set up SEC-type libraries (security libraries) for these files. Note: If a library you specify in this field does not exist on your machine, the Create Plan Library screen appears after you press Enter from the Libraries for This Plan screen. An example of the Create Plan Library screen follows this table. This screen lets you verify the library name that appears on the Libraries for This Plan screen, but does not exist on your machine. Press Enter to create the library, or press F3 to exit without creating it. If the library name is not correct, enter a new name. The library name on the Libraries for This Plan screen will be updated automatically.

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

B.3 Merge Information Screen

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

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

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

Figure B–3 Merge Information screen

```

96001E                               Plan the Upgrade                               Screen 2 Of 3
                                Merge Information

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

Specify Merge Modes And Library Names.

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

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

```

The following table explains the fields on this screen.

Field	Explanation
Data Dictionary Merge	<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> <p>0 – Do not run the merge (No Merge).</p> <p>2 – Run the merge and generate the reports (Final).</p> <p>3 – Run the language upgrade (Replace).</p> <p>This is valid for language upgrades only. For upgrade, it will run as 2 (Final).</p> <p>Note: To update the data dictionary glossary, see Section B.5, "Advanced Options Screen" in this appendix.</p>
Data Dictionary Library Name	Specify the name of the production library that contains your Data Dictionary file (F9200).
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> <p>0 – Do not run the merge (No Merge).</p> <p>2 – Run the merge and generate the reports (Final).</p> <p>3 – Run the language upgrade (Replace). This is valid for language upgrades only. For upgrades, it will run as 2 (Final).</p>
Vocabulary Overrides Library Name	Specify the name of the production library that contains your Vocabulary Overrides file (F9220).
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 JDFFDATA.</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> <p>0 – Do not run the merge (No Merge).</p> <p>2 – Run the merge (Final).</p> <p>3 – Run the language upgrade (Replace). This is valid for language upgrades only. For upgrades, it will run as 2 (Final).</p>
DREAM Writer Library Name	Specify the name of the production library that contains your DREAM Writer file (F98301).

Field	Explanation
Menu Master Merge	<p>Specify the mode in which you want the merge to run.</p> <p>For upgrades:</p> <p>In final mode, the merge adds new menus and lists them on the Menu Additions Report.</p> <p>It may produce a Menu Merge Exceptions report, which lists new and obsolete programs and other menu conditions which may need to be reviewed.</p> <p>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.</p> <p>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.</p> <p>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 JD FDATA.</p> <p>0 – Do not run the merge (No Merge).</p> <p>2 – Update existing menus and generate the reports.</p> <p>3 – For language upgrades, replace all JD Edwards World menus.</p>
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> <p>0 – Do not run the merge (No Merge).</p> <p>2 – Run the merge and generate the report (Final).</p> <p>3 – Run the language upgrade (Replace). This is valid for language upgrades only. For upgrades, it will run as 2 (Final).</p> <p>Note: To update the user defined code detail text, see Section B.5, "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> <p>0 – Do not run the merge (No Merge).</p> <p>2 – Run the merge and generate the report (Final).</p>

Field	Explanation
Generic Message/Rates Library Name	Specify the name of the production library that contains your Generic Message/Rates files (F0019, F00191, and F00192).
Help Master Merge	Specify the mode in which you want the merge to run. This merge runs in replace mode only, which replaces changed help text and adds new help text. It does not replace your entire help file. The merge does not produce a report. 0 – Do not run the merge (No Merge). 3 – Run the merge in replace mode (Replace).
Help Master Library Name	Specify the name of the production library that contains your Help file (F98HELP).
Software Repository Merge	Specify the mode in which you want the merge to run. 0 – Do not run the merge (No Merge). 2 – Run the merge and generate the report (Final).
Software Repository Library Name	Specify the name of the production library that contains your Software Versions Repository files (F9801 and F9802).
Generic Text Keys Merge	Specify the mode in which you want the merge to run. The merge does not produce a report. 0 – Do not run the merge (No Merge). 2 – Run the merge (Final).
Gen. Text Applic. Key Files (Generic Text Application Key Files) Library Name	Specify the name of the library that contains your Generic Text Application Key files (F00161 and F00162). These files contain the key fields that are used on generic text windows (program P0016) to access the generic text. For example, F14 (Memo) on the User Defined Codes screen accesses the User Defined Code Detail window (a generic text window), which displays descriptive text about a specific user defined code. The three key fields displayed at the top of the window are defined in the Generic Text Application Key files. You cannot modify the information in these files.
Auto Acct Instructions (Automatic Accounting Instructions) Merge	Specify the mode in which you want the merge to run. In final mode, the merge adds new automatic accounting instructions (AAIs) with the exception of distribution AAIs. The merge also produces a report that lists the new AAIs. 0 – Do not run the merge (No Merge). 2 – Run the merge and generate the report (Final).
Auto Acct Instructions (Automatic Accounting Instructions) Library Name	Specify the name of the production library that contains your Automatic Accounting Instructions file (F0012).
Next Numbers Merge	Specify the mode in which you want the merge to run. In final mode, the merge adds new next numbers (index lines) for existing systems or new systems. The merge also produces a report that lists the new next numbers. 0 – Do not run the merge (No Merge). 2 – Run the merge and generate the report (Final).
Next Numbers Library Name	Specify the name of the production library that contains your Next Numbers file (F0002).

B.4 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.

Figure B–4 Printer Information screen

```

96001D                               Plan the Upgrade
                                      Printer Information

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

The following information will be used to determine how to print
the reports created by the upgrade process.

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

Override Print Options . . . . . 0
Output Queue . . . . . QPRINT

Width of Form. . . . . 132
Length of Your Form. . . . . 68
Overflow Line. . . . . 62
Characters Per Inch. . . . . 15
Lines per Ince . . . . . 8
Form Type. . . . . *STD
Number of Copies . . . . . 1

F12 or Enter=Previous                F24=More Keys

```

The following table explains the fields on this screen.

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

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

B.5 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

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

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

Figure B-5 Advanced Options screen

96001A		Plan the Upgrade
		Advanced Options
Plan Name.	ZJDE_ALT	TEST (ALTERNATE) 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.		<u>0</u>
Run Control File Conversion.		<u>1</u>
Update Data Dictionary Glossary.		<u>1</u>
User Defined Codes detail text update.		<u>1</u>
Double Byte Environment.		<u>0</u>
Convert data to upper case		<u>0</u>
F12 Or Enter=Previous		F24=More Keys

The following table explains the fields on this screen.

Field	Explanation
Hold on Print Queue	Specify whether to hold the print file in the print queue rather than printing it. Valid values are: 0 – Do not hold files on the print queue. 1 – Hold files on the print queue.
Run Control File Conversion	Specify whether control file conversion should run during the upgrade process. Leave this value set to 1 unless you are instructed otherwise. Valid values are: 0 – Do not run control file conversion. 1 – Run control file conversion.
Update Data Dictionary Glossary	Specify whether the data dictionary glossary should be updated during the upgrade process. If you have changed the glossary extensively in the past, you may not want to update it. However, because no report exists to show you the glossary differences between JDFDATA and your environment, no alternative exists to update your glossary. Glossary items cannot be selectively updated. Valid values are: 0 – Do not update the glossary. 1 – Update the glossary.
User Defined Codes Detail Text Update	Specify whether the detailed text associated with user-defined codes (F9816 and F98163) should be updated during the upgrade process. Valid values are: 0 – Do not update the detailed text. 1 – Add new detailed text (does not affect existing text).
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.

Field	Explanation
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.

Figure B–6 Data Dictionary Field Ownership screen

```

96001F                                Plan the Upgrade                                Screen 3 of 3
                                Data Dictionary Field Ownership

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

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

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