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This guide was revised 12/99
IMPORTANT: You must be on one of the following to install this upgrade software:

- Version 3 Release 2 Modification 0 (V3R2M0) for CISC
- Version 3 Release 7 Modification 0 (V3R7M0) for RISC
- IBM's current general availability level of the AS/400 operating system

**TECHNICAL ASSISTANCE**

Call the appropriate phone number in the chart below if you have problems installing this software during regular business hours.

<table>
<thead>
<tr>
<th>LOCATION</th>
<th>PHONE NUMBER</th>
<th>HOURS (Monday through Friday)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Americas</td>
<td>From the U.S. or Canada, call the 800 toll-free</td>
<td>6:00 a.m. to 6:00 p.m., Mountain</td>
</tr>
<tr>
<td></td>
<td>number J.D. Edwards gave to you if you subscribe to</td>
<td>Time</td>
</tr>
<tr>
<td></td>
<td>the J.D. Edwards annual maintenance program (customer</td>
<td></td>
</tr>
<tr>
<td></td>
<td>support and software updates).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If you do not subscribe, or if you are outside the</td>
<td></td>
</tr>
<tr>
<td></td>
<td>U.S. or Canada, call (303) 334-4000 and ask for</td>
<td></td>
</tr>
<tr>
<td>Europe, Middle East, and</td>
<td>Call 44-1494-682682.</td>
<td>8:00 a.m. to 6:00 p.m., Greenwich</td>
</tr>
<tr>
<td>Africa</td>
<td></td>
<td>Mean Time</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>Call 65-229-1656.</td>
<td>8:00 a.m. to 6:00 p.m., Singapore</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Time</td>
</tr>
</tbody>
</table>

**AFTER HOURS TECHNICAL ASSISTANCE**

If you have emergency problems installing your software during hours other than those shown in the chart above, you can use our 24-hour customer support (same phone number as above) if:

- You have purchased the two-day blocks of 48-hour customer support, or
- You have contracted and paid for PREMIER maintenance services.

**TRAINING CONSIDERATIONS**

The updates described in this publication could affect how your staff uses J.D. Edwards software. Please make arrangements to train your staff concerning these updates.
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Introduction

This publication is written for those who install various upgrades of J.D. Edwards software, including:

- Reinstallations of full releases
- Cumulative PTFs
- Unscheduled PTFs
- Untested quick fixes

Upgrade Process Overview in this publication defines these upgrade types.

This publication does not give you step-by-step instructions about how to upgrade your software, which the upgrade workbooks do. Instead, it presents upgrade information topically, introducing topics not covered in the workbooks and expanding on others. J.D. Edwards suggests you begin with the appropriate workbook.

Publication Conventions

In this publication, enter means type the required information and press the Enter key, type means type the required information without pressing the Enter key, and select means type the number that appears next to a menu selection and press the Enter key.

Software Shipments

J.D. Edwards ships its software on two sets of media. The first set is labeled LODRUN. It contains the LODRUN procedure and the installation libraries. The second set is composed of another set of tapes or CDs labeled by application. Each one contains a number of J.D. Edwards systems grouped according to verticals. For example, the Manufacturing and Distribution systems could be grouped together on an application tape. You receive with your shipment a printout titled Media Content that lists the contents of each application medium. The various storage mediums for the media include tapes, cassettes, cartridges, and CDs.
Upgrade Naming Conventions

The following sections describe the naming conventions for the various upgrade libraries.

Cumulative PTFs

As corrections are made to J.D. Edwards software products, they are added to a cumulative PTF library. On a periodic basis, J.D. Edwards assigns this library a modification level number. The current PTF library is then sent with each software release until the software release is updated with the PTF. At any point in the future, upon request, J.D. Edwards can send you the most recent PTF library upon request. The naming convention for scheduled PTFs is A##PCxxyy:

![Diagram of A##PCxxyy]

The first two characters represent the software release. The third character is the version, followed by PC. The three characters that follow PC represent the periodic PTF level number. The last two characters differentiate a specific cumulative PTF from others. After the library is installed, the current software release version and PTF level appear in the bottom right of the menu whenever you access Hidden Selection 25 from any menu.

Unscheduled PTFs (Ship Boxes)

The naming convention for unscheduled PTFs is A##PCxxyy:

![Diagram of A##PCxxyy]

The first two characters represent the software release. The third character is the version, followed by PC. The three characters that follow PC represent the periodic PTF level number. The last two characters differentiate a specific unscheduled PTF from others. All unscheduled PTFs are predicated on an existing periodic PTF level.
Untested Quick Fixes

In addition to the cumulative and unscheduled PTFs, there are program corrections that require immediate attention. These individual program corrections are delivered as untested quick fixes. The naming convention for untested quick fixes is A##xxxx:

A8 1 xxxx

- Indicates release level
- Indicates the version for the release level
- Indicates the SAR number

The first two characters represent the software release. The remaining characters represent the Software Action Request (SAR) number associated with this fix.
Upgrade Process Overview

This chapter gives you a general understanding of the process involved with keeping your J.D. Edwards software updated. It includes descriptions of the various upgrades J.D. Edwards distributes, information about the flow of the upgrade process, and a list of the documentation available to help you upgrade your software.

General Concepts

Once or twice a year, J.D. Edwards upgrades its software to advance with new AS/400 technology, database changes, or program improvements. J.D. Edwards sent you the upgrade on the magnetic medium you selected. The upgrade you received contains either:

- A complete replacement of your software if you requested a full release, or
- A partial replacement of your software if you requested a program temporary fix (PTF)

The following sections describe the various updates J.D. Edwards distributes.

Full Release

This upgrade contains major enhancements and database changes developed since the last full release of the software. In addition, it includes upgrade information contained in scheduled PTFs issued since the previous full release. J.D. Edwards distributes full releases when a large number of updates have accumulated and major database changes are needed. J.D. Edwards tries to maximize the time between full releases and rely as much as possible on unscheduled and cumulative PTFs. Full releases, which are shipped about every 12 to 18 months, require a complete and total replacement of the software.

Cumulative PTF

This upgrade contains corrections developed since the last cumulative PTF or full release of the software. For example, cumulative PTF A81PC00001 updates release level A8.1.

Unscheduled PTF (Ship Box)

This upgrade is a sort of “mini-PTF” and occasionally is referred to as a “ship box.” The unscheduled PTF represents a product or a family of products, such as Distribution or Financials.

Unscheduled PTFs are tested and sometimes cumulative. In general, as J.D. Edwards makes enhancements to a product, these changes accumulate until released in an unscheduled PTF. Subsequent full releases overlay the contents of the unscheduled PTF.
Upgrade Process Overview

Untested Quick Fix (Interim PTF)

This upgrade provides an immediate and temporary solution to a client’s emergency situation. Because of its uncontrolled nature, the quick fix often is untested. The untested quick fix was formerly referred to as the “Interim PTF.”

Reinstallation Process Flow

During the reinstallation process, you upgrade an alternate environment, which you create, and then you upgrade your production environment by using the upgraded alternate environment. Upgrading the alternate environment has six major steps, and upgrading the production environment has five.

Alternate Environment

Step 1

• Load the upgrade planner (JDFINS) and upgrade software (JDEINSTAL) libraries

Step 2

• Create an alternate environment
  • Set up upgrade plans for the alternate environments by using the upgrade planner
  • Validate the upgrade plans

Step 3

• Load program objects, test data, and source code to alternate libraries

Step 4

• Convert and merge control files
• Convert application control files
• Convert BIG and LTL (little) files listed in the file scheduler
• Convert “other” files
• Rebuild data dictionary/vocabulary overrides/DREAM Writer
• Rebuild the field reference files and the J.D. Edwards message file
• Build the join logical files
Step 5

- Update menus by using the Menu Merge Exceptions report
- Update data dictionary items by using the Data Dictionary Merge Report
- Update user defined codes by using the User Defined Code Merge report
- Update the automatic accounting instructions by using the New Automatic Accounting Instructions (AAI) report
- Perform application specific instructions (ASIs)
- Review DREAM Writer versions by using the DREAM Writer Review Workbench
- Create new files
- Rebuild menu word search
- Run special jobs for specific product groups
- Perform the optional and cleanup procedures

Step 6

- Test J.D. Edwards A8.1 software and applications in the alternate libraries

Production Environment

Step 1

- Set up upgrade plans for the production environments by using the upgrade planner
- Validate the upgrade plans

Step 2

- Set up work files

Step 3

- Convert and merge control files
- Convert application control files
- Convert BIG and LTL (little) files listed in the file scheduler
- Convert “other” files
- Rebuild data dictionary/vocabulary overrides/DREAM Writer
- Rebuild the field reference files and the J.D. Edwards message file
Upgrade Process Overview

Step 4

- Copy selected control files
- Perform minimal application specific instructions (ASIs)
- Review DREAM Writer versions by using the DREAM Writer Review Workbench
- Create new files
- Rebuild menu word search
- Run special jobs for specific product groups

Step 5

- Change J.D. Edwards system values
- Rename libraries (alternate to production)

The following diagrams illustrate the flow of the reinstallation process for the alternate and production environments. The previous steps are identified in the diagrams.
Reinstallation Process Flow (Alternate)

1. LODRUN Procedure
   - Restoring Objects
     - JDEINSTAL
     - JDFINS

2. Client Input
   - Upgrade Planner (A97IBM)
     - Upgrade Plans

3. Upgrade Software (REINSTALL)
   - Upgrade Software (UPG_STEP1)
     - JDOBJALT and JDFDATAL Libraries
     - Client’s Alt Libraries (Old Format)
     - File Conversions and Control File Merges (UPG_STEP2)
     - Client’s Alt Libraries (Partially Upgraded)

4. Client’s Alt Libraries
   - Rebuild DD/VO/DW and FFRFs, and Build JLFs
     - User Defined Code Merge Report
     - New AAI Report
     - Special Application Jobs
     - Build DD/VO/DW and FFRFs, and Build JLFs

5. Update Applications (G97R4)
   - Client’s Alt Libraries (Completely Upgraded)
     - (Files in client’s libraries updated with new application information)

6. Test Software and Applications in Alternate

Reference 12/99 A8.1 Upgrade 1-5
Reinstallation Process Flow (Production)

1. Client Input
   → Upgrade Planner (A97/IBM)
   → Upgrade Plans

2. Upgrade Software ("ALT")
   → Set Up Work Files (ALT_STEP1)
   → JDEINSTAL

3. JDFOBJALT and JDFDTAALT Libraries
   → Client's Prod Libraries (Old Format)
   → File Conversions and Control File Merges (ALT_STEP2)
   → Client's Prod Libraries (Partially Upgraded)

4. Copy Selected Control Files
   → Apply Minimal ASIs
   → DREAM Writer Review Workbench
   → Copy Selected Control Files
   → Update Applications (G97R4)
   → Client's Prod Libraries (Completely Upgraded)
   → (Files in client's libraries updated with new application information)

5. Change J.D. Edwards System Values
   → Rename Libraries
   → Special Application Jobs
   → Step 1
   → Step 2
   → Step 3
   → Step 4
   → Step 5
   → Cleanup Procedures
   → Operate Production at A8.1
Documentation

J.D. Edwards provides you with several publications to help you through the installation or upgrade process.

Release Notes

Release Notes describes enhancements for a new release of J.D. Edwards software. Because it is written for upper management, Release Notes is high level, “big picture,” and conceptual in approach. It organizes enhancement information according to product groups. J.D. Edwards publishes Release Notes a few months before a new software release is available. To receive Release Notes, contact your J.D. Edwards upgrade coordinator.

“Read Me First” Letter

The Read Me First letter contains information you need before you install or upgrade your software, such as IBM system requirements, and various notes on important software and documentation issues not mentioned in the other publications. You should read this letter before you read any other installation or upgrade publication.

Workbooks

The upgrade workbooks contain instructions about how to install or upgrade the software. The easy-to-use checklists in the workbooks guide you through the installation or upgrade process in a step-by-step manner. Separate workbooks are available for the installation, reinstallation, and PTF installation processes.

Software Reinstallation Quick Reference Guide

The Software Reinstallation Quick Reference Guide is provided for clients reinstalling to A8.1. It provides you with quick procedural notes and some screens, but you should not depend on it to complete the upgrade process.

Upgrade Reference Guide

The Upgrade Reference Guide contains information about topics such as installing new J.D. Edwards systems, merges, control files, and file conversions, as well as detailed procedures and other considerations not covered in the workbooks. You should view the reference guide as a companion to the workbook. However, most of you will find the workbooks complete enough to install or upgrade your software successfully.

Language Upgrade Guide

The Language Upgrade Guide describes how to install and maintain one or more languages in one database or environment. It explains how to set up a language as a base or alternate language.
Merges and Control Files (Reinstallations Only)

This chapter explains control files, which define the basic structure of J.D. Edwards software, and describes the merges that update them. The information in this chapter applies to reinstallations only.

Control Files

J.D. Edwards software consists of control files that make up its basic structure. These files organize and sequence the information that you put into the J.D. Edwards system. In addition, the files determine the types of operations to be performed on the input data. For example, the Data Dictionary files (F9200, F9202, F9203, F9204, F9207, F9210, F9816, and F98163) define all specifications for any data item in J.D. Edwards software. Control files differ from transaction files in the following ways:

- Control files contain data that is shared between J.D. Edwards and you, but transaction files contain unique data provided by you only.
- Transaction files can be converted but will never have J.D. Edwards data merged into them.

Many of the control files can be modified by you. For instance, you can change a menu to better suit your business needs. Because you can modify the control files, J.D. Edwards does not automatically modify the customized items with J.D. Edwards data when you perform a reinstallation. The upgrade process for the control files has two general steps:

- Merges – When you run the merges, they automatically add new items to the control files or change certain aspects of the files that are not affected by customization.
- Application Specific Instructions (ASIs) – The ASIs explain how to update those aspects of the files that could contain customized data. For more information about ASIs, see Application Specific Instructions in this publication.

This two-step upgrade process protects your tailored information from being overlaid by J.D. Edwards information.
Merges and Control Files (Reinstallations Only)

Merge Process Overview

The main upgrade job merges the control files in the J.D. Edwards data library into your existing control files, which are in your common library or production data libraries. After the control file merges complete, you may need to apply application specific instructions (ASIs) to finish updating your control files. For information about ASIs, see Application Specific Instructions in this publication.

The upgrade process submits the merges automatically. If you must submit an individual merge from the Merges menu (G97R41), see Run Individual Merges in this chapter.

Proof and Final Modes

You can run the merges in two ways:

- Proof Mode – Creates merge reports but does not update control files. By using this mode, you can examine the changes that are reported without updating your files.

- Final Mode – Creates merge reports and updates certain aspects of items in the control files.

You specify the modes in which the merges should run on the Merge Information screen in the upgrade planner. For information about setting the modes, see the Reinstall Workbook.

Merge Sequence

The merges are submitted automatically during the upgrade process. Merges are not submitted for new J.D. Edwards installations. The merges and updates that are submitted automatically include:

- Software Version Repository (J97885)
- Data Dictionary (J97882)
- DREAM Writer (J97886)
- Vocabulary Overrides (J97884)
- User Defined Codes (J97880)
- Generic Text Application Keys (J97888)
- Menus (J97883A)
- Help Instructions (J97887)
- Generic Message/Rates (J97881)
- Automatic Accounting Instructions (J98727)
- Next Numbers (J98728)

NOTE: If you must submit any or all of the above merges manually, you should do so in the order in which they appear above. Some merges require other merges to be run first. For information about how to submit a specific merge and for a list of dependencies, see Run Individual Merges in this chapter. For an explanation about what each merge does, see the appropriate merge section in this chapter.
Software Versions Repository Merge

The Software Versions Repository files (F9801 and F9802) serve together as a master directory of information for all programs, files, screens, reports, and so forth, that exist in your J.D. Edwards software.

The Software Versions Repository merge updates the software versions repository members in your production data library with current member information in the JDFDATA library.

The Software Versions Repository merge:

- Adds new records to the Software Versions Repository Master file (F9801) and the Software Versions Repository Detail file (F9802)
- Prints a report that lists updated members in the software versions repository
- Updates the following fields in existing members:
  - Member ID
  - Description
  - Function Code
  - Install System
  - Reporting System
  - Base Member Name
  - File Prefix
  - Maint./RSTDSP
  - Omit Option
  - Generation Sev (Severity)
  - Copy Data (Y/N)
  - Optional File
  - Common File

If your system has a J.D. Edwards source library, the merge adds records from the Software Versions Repository Detail file (F9802) in the JDFDATA library to your production data library. In addition, the merge updates the following fields in detail records:

- Source Library
- Object Library
### Merges and Control Files (Reinstallations Only)

- Source File
- SAR Number
- Version ID

NOTE: This merge must complete successfully before you run any other merge.

#### Software Versions Repository Merge Report

The Software Versions Repository Merge Report (R98726A) lists the members in your production data library that are affected by the merge. For each member, the report shows field values as they are before and after the merge. An example of the report appears below.

<table>
<thead>
<tr>
<th>Member ID</th>
<th>Member Description</th>
<th>Inst Sys.</th>
<th>Rpt. Sys.</th>
<th>FN Base</th>
<th>Copy</th>
<th>Optional</th>
<th>Common</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASSET</td>
<td>Old Info:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>New Info:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONVERT</td>
<td>Old Info: Software Installation - Converter</td>
<td>97</td>
<td>97</td>
<td>J99600</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td></td>
<td>New Info: Software Installation - Converter</td>
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<td>88</td>
<td>J97612</td>
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<td>N</td>
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<td>C00RSC</td>
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<td>98</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>C0015</td>
<td>Old Info:</td>
<td>00</td>
<td>00</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>New Info:</td>
<td>98</td>
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<td></td>
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</tr>
<tr>
<td>C00151</td>
<td>Old Info:</td>
<td>00</td>
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<tr>
<td></td>
<td>New Info:</td>
<td>98</td>
<td>98</td>
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<td>N</td>
<td>N</td>
</tr>
<tr>
<td>C00161</td>
<td>Old Info:</td>
<td>00</td>
<td>00</td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>New Info:</td>
<td>98</td>
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<td>N</td>
</tr>
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<td>C001610LD</td>
<td>Old Info:</td>
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<td>00</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>New Info:</td>
<td>98</td>
<td>98</td>
<td></td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>C0030</td>
<td>Old Info:</td>
<td>98</td>
<td>98</td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>New Info:</td>
<td>00</td>
<td>00</td>
<td></td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>C0036</td>
<td>Old Info:</td>
<td>98</td>
<td>98</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>New Info:</td>
<td>00</td>
<td>00</td>
<td></td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>C0040N</td>
<td>Old Info:</td>
<td>98</td>
<td>98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>New Info:</td>
<td>88</td>
<td>88</td>
<td></td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>C0080</td>
<td>Old Info:</td>
<td>00</td>
<td>00</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>New Info:</td>
<td>98</td>
<td>98</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Data Dictionary Merge

The Data Dictionary files (F9200, F9202, F9203, F9204, F9207, F9210, F9816, and F98163) serve as the central definition point of all specifications for any data item in J.D. Edwards software. Data items include fields, menu messages, error messages, and help text.

The Data Dictionary merge updates the items in your production data library with current data dictionary information in the JDFDATA library. In final mode, the merge adds new data items and updates certain fields in your existing data items. It does not update fields in your data items that contain information you defined for your own specific purposes.

The Data Dictionary merge:

- Adds new data items
  
  NOTE: If a new data item has a classification (Data Item Class), the merge defaults the display decimals of the data item classification into the new data item. Review these data item classifications before you run the merge.

- Updates the following fields in existing data items:
  
  o Alias Name
  o Alias Type
  o Alpha Description
  o Data File Decimals
  o Data Item Class
  o Size
  o Type
  o Glossary Group
  o Help Program
  o Install System Code
  o Item Occurrences
  o Item Parent
  o Next Number Index
  o Next Number System
  o Release Last Changed
  o Reporting System Code
  o Glossary – if requested (does all or none based on your decision)
Merges and Control Files (Reinstallations Only)

The Data Dictionary Merge updates the following fields for items that you have not customized. If you have customized any of these fields for an item, the merge does not update the item, but lists these items and the fields you should update on the Data Dictionary Merge Report – Manual Changes (R98722). To make the updates, refer to Phase 3 – Update Applications in the Reinstall Workbook.

- Row Description
- Column Title
- Data Display Parameters
- Data Display Rules
- Data Edit Rules
- Default Values
- Edit Rules Specifications
- Justify

The Data Dictionary Merge Report – Replaced Changes (R98722A) lists data items that were automatically replaced by the merge.

NOTE: The merge does not change the Display Decimals field for existing data items. These are listed on the Data Dictionary Merge Report – Manual Changes (R98722). Do not change display decimals for items QTYINV or CURRENCY.

IMPORTANT: After making the manual changes to your Data Dictionary files, you must submit the Rebuild DD/VO job from the Post Upgrade Menu (G97R4). This job updates the vocabulary overrides fields with the row/column heading text specified in the data dictionary if the override flags for the fields are blank.
# Data Dictionary Merge Reports

The Data Dictionary Merge Report – Manual Changes (R98722) lists the manual updates you must make to data items in your production data library. An example of the report appears below.

<table>
<thead>
<tr>
<th>Data Item</th>
<th>Description</th>
<th>Field</th>
<th>Your Value</th>
<th>Recommended Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>#MHO</td>
<td>Effect on GL</td>
<td>Data Edit Rules . . . .</td>
<td>VALUE</td>
<td>VALUE</td>
</tr>
<tr>
<td>A003</td>
<td>Category Code – Argentina</td>
<td>Data Edit Rules Spec 1</td>
<td>Y N M H W</td>
<td></td>
</tr>
<tr>
<td>APPN</td>
<td>Period Number – Acco</td>
<td>Data Edit Rules . . .</td>
<td>RANGE</td>
<td></td>
</tr>
<tr>
<td>ARPN</td>
<td>Period Number – Acco</td>
<td>Data Edit Rules Spec 1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>ATO</td>
<td>Address Type – User</td>
<td>Data Edit Rules Spec 1</td>
<td>** ** *</td>
<td></td>
</tr>
<tr>
<td>ATOT</td>
<td>ATO Line Type</td>
<td>Data Edit Rules Spec 1</td>
<td>I R F V</td>
<td></td>
</tr>
<tr>
<td>BILL</td>
<td>Billable (Y/N)</td>
<td>Data Edit Rules Spec 1</td>
<td>Y N ' '</td>
<td></td>
</tr>
<tr>
<td>BKTP</td>
<td>Record Type – Bank T</td>
<td>Data Edit Rules Spec 1</td>
<td>UDC</td>
<td></td>
</tr>
<tr>
<td>DSPM</td>
<td>Display Mode – Code</td>
<td>Data Edit Rules Spec 1</td>
<td>C N ' '</td>
<td></td>
</tr>
</tbody>
</table>
The Data Dictionary Merge Report – Replaced Changes (R98722A) lists the changes that are automatically made to data items in your production data library during the merge. An example of the report appears below.

<table>
<thead>
<tr>
<th>Data Item</th>
<th>Appl</th>
<th>Screen</th>
<th>Description</th>
<th>Field</th>
<th>Was</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>#AIL</td>
<td></td>
<td></td>
<td>Amount – current Ave Data Item Class.</td>
<td>CURRENCY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#AMB</td>
<td></td>
<td></td>
<td>Amount/Percent Incr System Code.</td>
<td>06</td>
<td>05</td>
<td></td>
</tr>
<tr>
<td>#AMD</td>
<td></td>
<td></td>
<td>Amount/Percent Incr System Code.</td>
<td>06</td>
<td>05</td>
<td></td>
</tr>
<tr>
<td>#AMP</td>
<td></td>
<td></td>
<td>Amount/Percent Incr System Code.</td>
<td>06</td>
<td>05</td>
<td></td>
</tr>
<tr>
<td>#AMS</td>
<td></td>
<td></td>
<td>Amount/Percent Incr System Code.</td>
<td>06</td>
<td>05</td>
<td></td>
</tr>
<tr>
<td>#ANP</td>
<td></td>
<td></td>
<td>Employee No. System Code.</td>
<td>06</td>
<td>05</td>
<td></td>
</tr>
<tr>
<td>#AO</td>
<td></td>
<td></td>
<td>Date - As of System Code.</td>
<td>08</td>
<td>05</td>
<td></td>
</tr>
<tr>
<td>#APL</td>
<td></td>
<td></td>
<td>Yes or No - Move to System Code.</td>
<td>08</td>
<td>05</td>
<td></td>
</tr>
<tr>
<td>#ASI</td>
<td></td>
<td></td>
<td>Alpha Description. Item Number–(If Trade In) Input No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>#AXM</td>
<td></td>
<td></td>
<td>Amount – Total Gross System Code.</td>
<td>06</td>
<td>05</td>
<td></td>
</tr>
<tr>
<td>#AXK</td>
<td></td>
<td></td>
<td>Amount – Total Excl C System Code.</td>
<td>06</td>
<td>05</td>
<td></td>
</tr>
<tr>
<td>#ACP</td>
<td></td>
<td></td>
<td>Current Load Data Display Rules</td>
<td>CODE</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Data Display Rules</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#ACD</td>
<td></td>
<td></td>
<td>Step Progression Pro System Code.</td>
<td>06</td>
<td>05</td>
<td></td>
</tr>
<tr>
<td>#CCL</td>
<td></td>
<td></td>
<td>Alpha Description. Balance – Cumulative C Balance – Cumulative Agreement</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>#CLO</td>
<td></td>
<td></td>
<td>Over Credit Limit (Y Data Edit Rules.</td>
<td>VALUE</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Data Edit Rules Spe</td>
<td>Y N 1 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#CQR</td>
<td></td>
<td></td>
<td>Display Cleared Reco System Code.</td>
<td>06</td>
<td>05</td>
<td></td>
</tr>
<tr>
<td>#CQ</td>
<td></td>
<td></td>
<td>Cumulative Quantity Data Item Class.</td>
<td>QTYINV</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#CRB</td>
<td></td>
<td></td>
<td>Total – Credits System Code.</td>
<td>25</td>
<td>09</td>
<td></td>
</tr>
<tr>
<td>#CTY</td>
<td></td>
<td></td>
<td>Configuration Type System Code.</td>
<td>99</td>
<td>97</td>
<td></td>
</tr>
<tr>
<td>#CUH</td>
<td></td>
<td></td>
<td>Amount – Current Hou Data Item Class.</td>
<td>CURRENCY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#CVR</td>
<td></td>
<td></td>
<td>Alpha Description. Variance – Contract Im Variance – Agreement Imbalance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>#DCP</td>
<td></td>
<td></td>
<td>Data Type Descriptio System Code.</td>
<td>08</td>
<td>05</td>
<td></td>
</tr>
<tr>
<td>#DD1</td>
<td></td>
<td></td>
<td>Density Type – Displ Data Edit Rules.</td>
<td>UDC</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Data Edit Rules Spe</td>
<td>39</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Data Edit Rules Spe DT</td>
<td>D7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#DD2</td>
<td></td>
<td></td>
<td>Density Type – Displ Data Edit Rules.</td>
<td>UDC</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Data Edit Rules Spe</td>
<td>39</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Data Edit Rules Spe DT</td>
<td>D7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#DD3</td>
<td></td>
<td></td>
<td>Density Type – Displ Data Edit Rules.</td>
<td>UDC</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Data Edit Rules Spe</td>
<td>39</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Data Edit Rules Spe DT</td>
<td>D7</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
DREAM Writer Merge

The Data Record Extraction and Manipulation facility (DREAM Writer) serves as a powerful data manipulator and cataloging system. DREAM Writer (files F98301, F98311, F98312, F9831, and if you are upgrading from release A6.2, F98302 and F98303) lets you create unlimited variations of standard J.D. Edwards reports and videos. It controls the data records that are selected for the specific version and the sequence of the records as they appear on the printed page.

The DREAM Writer merge updates the DREAM Writer versions in your production data library with current information in the JDFFDATA library. It runs off the Software Versions Repository Master file (F9801).

The Software Versions Repository merge must run before the DREAM Writer merge.

NOTE: All versions delivered in the J.D. Edwards data library are prefixed by the letters XJDE or ZJDE.

The merge does the following to XJDE versions:

- Adds new form IDs and their associated versions
- Adds new XJDE versions to existing form IDs
- Replaces existing versions
- Deletes obsolete XJDE versions

The merge does the following to ZJDE versions:

- Adds new form IDs and their versions
- Adds new ZJDE versions to existing form IDs

The merge also does the following to existing ZJDE versions and your custom versions:

For additional parameters

- Updates the following fields:
  - Based On File
  - Based On Member
  - Format Name
  - File Prefix
  - File Output Type
  - Override Logical File
  - Type Report Totaling
  - Optimize Option
Merges and Control Files (Reinstallations Only)

- Sequential Only
- Open for Output
- Open for Update
- Open for Delete

  ○ Does not update the following fields:
    - Job To Execute
    - Printer Overrides
    - Version Title/Optional Report Title
    - Print Cover Page (Y/N)
    - Mandatory Processing Option
    - Job Queue
    - User Exclusive (0/1/2/3)
    - Output Media

NOTE: You will perform application specific instructions (ASIs) to update these fields if changes are necessary.

For processing options

○ Updates processing option text

○ Assigns a default selection value (if specified) for new processing options

○ Converts selection values for existing options only if changes are made to any of the following fields:
  - Data Field Name
  - Data Item Size or Type
  - Date Field Type
  - Right Justify Type

For data selection

○ Converts selection values accordingly if changes were made to field attributes

○ Removes the selection criteria for fields that no longer exist in the based-on file

○ Does not make changes to data selection values for existing optional fields

○ Changes the selection criteria to match the J.D. Edwards settings for non-optional fields
Merges and Control Files (Reinstallations Only)

- For custom versions, adds selection criteria that J.D. Edwards has added to the first changed XJDE version associated with the form ID

- For existing ZJDE versions, adds selection criteria that J.D. Edwards has added to the corresponding ZJDE versions (at the new release) associated with the form ID

**For data sequence**

- For non-optional sequence fields, applies all specified changes to the field

- For optional sequence fields, changes the field name only if the old field name no longer exists in the based-on file

- For custom versions, changes totaling level, page break, and sequence A/D only if the field name is the same as in the first changed XJDE version associated with the form ID

- For existing ZJDE versions, changes totaling level, page break, and sequence A/D only if the field name is the same as in the corresponding ZJDE versions (at the new release) associated with the form ID

- For custom versions, adds new sequencing criteria that J.D. Edwards has added to the first changed XJDE version associated with the form ID

- For existing ZJDE versions, adds new sequencing criteria that J.D. Edwards has added to the corresponding ZJDE versions (at the new release) associated with the form ID

- Deletes sequence fields that no longer exist in the based-on file
Vocabulary Overrides Merge

The Vocabulary Overrides file (F9220) lets you change the text information on J.D. Edwards screens and reports to reflect your own terminology or language. The Vocabulary Overrides merge updates the vocabulary override records in your production data library with current vocabulary override information in the JDFDATA library.

The merge selects records in the Software Versions Repository Master file (F9801) that have function code DSPF, PRTF, or PRTS, and:

- Adds vocabulary override records for new Display/Printer files
- Changes Line 24 error text and messages, and default screen titles
- Adds new fields to existing vocabulary override records if they have prefix VTX
- Deletes VTX fields that are not delivered in the JDFDATA library.

NOTE: If you have added VTX fields to a video or report with the standard J.D. Edwards name, you could lose VTX fields.

- Updates fields in existing vocabulary override records with new text if the override flags for the fields are either blank or J
- Replaces all function key definitions

In final mode, the merge does not update VTX fields that have a Y in the override field. If changes exist for these fields, you will find them documented in the Vocabulary Overrides Merge report (R98721) you create when you run this merge.

NOTES:

- The Data Dictionary/Vocabulary Overrides/DREAM Writer Rebuild job could replace the text descriptions again with your company-specific text.
- The Vocabulary Overrides merge totally replaces the function key translation files (F9601 and F9611). If these files contain your own custom information, you must enter the information again after the merge completes.

Vocabulary Overrides Merge Reports

The Vocabulary Overrides merge produces two reports. The first report (R987212) lists the vocabulary overrides that were changed in your production data library. It shows the following updates.

- New text descriptions for VTX fields
- Overrides added
- VTX fields deleted
- New VTX fields or new screens
This report is provided for your information only. An example of the report appears below.

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Field Name</th>
<th>Old Text Description</th>
<th>New Text Description</th>
<th>Change Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RO004P</td>
<td>VTX004</td>
<td>INSTALL</td>
<td>Ins</td>
<td>New Video/Report</td>
</tr>
<tr>
<td>RO004P</td>
<td>VTX005</td>
<td>Description</td>
<td>Description</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO004P</td>
<td>VTX006</td>
<td>Code</td>
<td>Code</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO004P</td>
<td>VTX010</td>
<td>(Y/N)</td>
<td>(Y/N)</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO004P</td>
<td>VTX012</td>
<td>User</td>
<td>Use</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO004P</td>
<td>VTX017</td>
<td>Sys</td>
<td>Sys</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO005P</td>
<td>VTX004</td>
<td>INSTALL</td>
<td>Ins</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO005P</td>
<td>VTX011</td>
<td>User</td>
<td>New VTX Field</td>
<td></td>
</tr>
<tr>
<td>RO005P</td>
<td>VTX012</td>
<td>Co</td>
<td>Comp</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO006P</td>
<td>VTX009</td>
<td>Begin</td>
<td>Begin</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO006P</td>
<td>VTX007</td>
<td>T</td>
<td>New VTX Field</td>
<td></td>
</tr>
<tr>
<td>RO006P</td>
<td>VTX008</td>
<td>Year</td>
<td>. . . Period Ending Dates/ Centuries. . .</td>
<td>New VTX Field</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX010</td>
<td>02/14</td>
<td>02/11/20</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX011</td>
<td>26/38/50</td>
<td>29/38/47</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX017</td>
<td>03/15</td>
<td>03/12/21</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX018</td>
<td>27/39/51</td>
<td>30/39/48</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX019</td>
<td>04/16</td>
<td>04/13/22</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX021</td>
<td>31/43</td>
<td>34/43/52</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX022</td>
<td>25/37/49</td>
<td>28/37/46</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX023</td>
<td>01/13</td>
<td>01/10/19</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX024</td>
<td>28/40/52</td>
<td>31/40/49</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX025</td>
<td>05/17</td>
<td>05/14/23</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX026</td>
<td>29/41/53</td>
<td>32/41/50</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX027</td>
<td>06/18</td>
<td>06/15/24</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX028</td>
<td>30/42/54</td>
<td>33/42/51</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX029</td>
<td>07/19</td>
<td>07/16/25</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX030</td>
<td>08/20</td>
<td>08/17/26</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX031</td>
<td>32/44</td>
<td>35/44/53</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX032</td>
<td>09/21</td>
<td>09/18/27</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX033</td>
<td>33/45</td>
<td>36/45/54</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX006</td>
<td>Period</td>
<td>Deleted VTX Field</td>
<td></td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX007</td>
<td>End of</td>
<td>Deleted VTX Field</td>
<td></td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX034</td>
<td>10/22</td>
<td>Deleted VTX Field</td>
<td></td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX035</td>
<td>34/46</td>
<td>Deleted VTX Field</td>
<td></td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX036</td>
<td>11/23</td>
<td>Deleted VTX Field</td>
<td></td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX037</td>
<td>35/47</td>
<td>Deleted VTX Field</td>
<td></td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX038</td>
<td>12/24</td>
<td>Deleted VTX Field</td>
<td></td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX039</td>
<td>36/48</td>
<td>Deleted VTX Field</td>
<td></td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX002</td>
<td>T</td>
<td>New VTX Field</td>
<td></td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX005</td>
<td>Begin</td>
<td>Begin Fisc.</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX006</td>
<td>Per 01</td>
<td>Per 01</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX007</td>
<td>Per 02</td>
<td>Per 02</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX008</td>
<td>Per 03</td>
<td>Per 03</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX010</td>
<td>Year</td>
<td>Date/Cent.</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX011</td>
<td>Per 10</td>
<td>Per 10</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX012</td>
<td>Per 04</td>
<td>Per 04</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX014</td>
<td>Per 06</td>
<td>Per 06</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX015</td>
<td>Per 07</td>
<td>Per 07</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX016</td>
<td>Per 11</td>
<td>Per 11</td>
<td>New Text Description</td>
</tr>
<tr>
<td>RO008P</td>
<td>VTX017</td>
<td>Per 12</td>
<td>Per 12</td>
<td>New Text Description</td>
</tr>
</tbody>
</table>
The second report (R98721) lists VTX fields in your production data library that have a Y in the override field and would have been affected by the merge if the override flags for those fields had been blank or J. These vocabulary overrides were not changed in your production data library. The report compares text descriptions for VTX fields in your production data library (Old Text Description) to JDFDATA. An example of the report appears below.

<table>
<thead>
<tr>
<th>Video Name</th>
<th>Field Name</th>
<th>Old Text Description</th>
<th>New Text Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>V06932</td>
<td>VTX003</td>
<td>Pay</td>
<td>Pay</td>
</tr>
<tr>
<td>V06932</td>
<td>VTX006</td>
<td>Pay</td>
<td>Pay</td>
</tr>
<tr>
<td>V08320</td>
<td>VTX002</td>
<td>Elig. Table 1</td>
<td>Init Elig Table</td>
</tr>
<tr>
<td>V08320</td>
<td>VTX009</td>
<td>Dep/Ben (Y/N)</td>
<td>Depend/Benef (Y/N)</td>
</tr>
<tr>
<td>V08320</td>
<td>VTX020</td>
<td>Elig. Table 2</td>
<td>Cont Elig Table</td>
</tr>
<tr>
<td>V08320</td>
<td>VTX021</td>
<td>Enter Amt./Rate (Y/N)</td>
<td>Enter Amt./Rate (Y/N)</td>
</tr>
<tr>
<td>V08320</td>
<td>VTX032</td>
<td>Flex Ant (Y/N)</td>
<td>Flex Amount (Y/N)</td>
</tr>
<tr>
<td>V08390</td>
<td>VTX011</td>
<td>Minimum Service</td>
<td>Comp Period</td>
</tr>
<tr>
<td>V08390</td>
<td>VTX012</td>
<td>Basis (Y,M,D)</td>
<td>Eligible Enrollment:</td>
</tr>
<tr>
<td>V08390</td>
<td>VTX013</td>
<td>Or</td>
<td>Ineligible Enrollment:</td>
</tr>
<tr>
<td>V08390</td>
<td>VTX014</td>
<td>Program 1</td>
<td>Status</td>
</tr>
<tr>
<td>V08390</td>
<td>VTX015</td>
<td>Program 2</td>
<td>Date Code</td>
</tr>
<tr>
<td>V08520</td>
<td>VTX007</td>
<td>Begin Plan Year M/D.</td>
<td>Begin Year (MM/DD)</td>
</tr>
<tr>
<td>V08520</td>
<td>VTX008</td>
<td>Depend/Benefic</td>
<td>Depend/Benefic Y/N</td>
</tr>
<tr>
<td>V12214</td>
<td>VTX020</td>
<td>Dep Meth:</td>
<td>Dep Meth:</td>
</tr>
<tr>
<td>V3003</td>
<td>VTX016</td>
<td>Crew Size.</td>
<td>Crew</td>
</tr>
<tr>
<td>V3003</td>
<td>VTX026</td>
<td>P.O. (Y/N)</td>
<td>P.O. (Y/N)</td>
</tr>
<tr>
<td>V3003</td>
<td>VTX029</td>
<td>Pay Point</td>
<td>Pay Point</td>
</tr>
<tr>
<td>V42025</td>
<td>VTX024</td>
<td>Sufix.</td>
<td>Sufix.</td>
</tr>
<tr>
<td>V42025</td>
<td>VTX025</td>
<td>Cust PO</td>
<td>Branch/Plant</td>
</tr>
<tr>
<td>V42060</td>
<td>VTX032</td>
<td>Doc. Type</td>
<td>Order Type</td>
</tr>
<tr>
<td>V42060</td>
<td>VTX042</td>
<td>Brn/Plt</td>
<td>Brn/Plt.</td>
</tr>
</tbody>
</table>

**User Defined Codes Merge**

The User Defined Codes files (F0004 and F0005) let you define codes, relate them to code descriptions, and assign values for certain fields. The User Defined Codes merge updates some user defined codes in your production data library with current user defined code information contained in the JDFDATA library.

The User Defined Codes merge:

- Adds new user defined code tables and their values for all system codes
- Adds new user defined code values to existing tables located in system codes 84 through 99 and in system code 00, record type IO
- Adds new user defined code values to other existing tables if the Hardcoded (Y/N) field is set to Y
- Changes the values in the Code Length, Code Num (Y/N), and 2nd Line (Y/N) fields in existing tables

NOTE: If the code length changes, the merge converts the code values in the User Defined Codes file (F0005) automatically.
- Changes the Hardcoded (Y/N) field for code values to match the J.D. Edwards default settings
- Adds the user defined code detail text if requested

In final mode, the merge does not change or delete user defined code values for existing tables. You must perform the application specific instructions to make these updates. To do these updates, see Application Specific Instructions in this publication.

User Defined Code Merge Report

The User Defined Code Merge report (R987241) lists changes to the User Defined Code Types file (F0004) and additions to the User Defined Codes file (F0005). It does not list new user defined code tables. An example of the report appears below.

<table>
<thead>
<tr>
<th>INS</th>
<th>Code Type</th>
<th>Code</th>
<th>Description 1</th>
<th>Description 2</th>
<th>Cde</th>
<th>2ND Cde</th>
<th>Merge</th>
</tr>
</thead>
<tbody>
<tr>
<td>00</td>
<td>CN</td>
<td></td>
<td>Address Book Credit Messages</td>
<td></td>
<td>02</td>
<td></td>
<td>F0004 Updated</td>
</tr>
<tr>
<td>00</td>
<td>HC</td>
<td></td>
<td>Special Handling Code-A/P Cks</td>
<td></td>
<td>03</td>
<td></td>
<td>F0004 Updated</td>
</tr>
<tr>
<td>00</td>
<td>IO</td>
<td></td>
<td>I/O Control Limit Exceeded</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>IO</td>
<td>P03114</td>
<td>2000</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>IO</td>
<td>P04257</td>
<td>250</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>IO</td>
<td>P042571</td>
<td>250</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>IO</td>
<td>P042572</td>
<td>250</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>IO</td>
<td>P042573</td>
<td>250</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>IO</td>
<td>P09131</td>
<td>1000</td>
<td></td>
<td>F0005 Added</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>IO</td>
<td>P09181</td>
<td>1000</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>IO</td>
<td>P12214</td>
<td>250</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>IO</td>
<td>P41200</td>
<td>100</td>
<td></td>
<td>** Already Exists</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>IO</td>
<td>P41202</td>
<td>17</td>
<td></td>
<td>** Already Exists</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>IO</td>
<td>P41240</td>
<td>17</td>
<td></td>
<td>**Already Exists</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>IO</td>
<td>P4SV0TX</td>
<td>99999</td>
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</tr>
<tr>
<td></td>
<td>IO</td>
<td>P93130</td>
<td>4000</td>
<td></td>
<td>F0005 Added</td>
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<td></td>
</tr>
<tr>
<td>00</td>
<td>LD</td>
<td></td>
<td>Level of Detail</td>
<td></td>
<td>00</td>
<td>Y</td>
<td>F0004 Updated</td>
</tr>
<tr>
<td>00</td>
<td>NV</td>
<td></td>
<td>INTRASIT regime code</td>
<td></td>
<td>05</td>
<td></td>
<td>F0004 Updated</td>
</tr>
<tr>
<td>00</td>
<td>TM</td>
<td></td>
<td>Mode of Transport</td>
<td></td>
<td>03</td>
<td></td>
<td>F0004 Updated</td>
</tr>
<tr>
<td>01</td>
<td>SC</td>
<td></td>
<td>Standard Industry Code</td>
<td></td>
<td>10</td>
<td></td>
<td>F0004 Updated</td>
</tr>
<tr>
<td>01</td>
<td>ST</td>
<td></td>
<td>Search Type</td>
<td></td>
<td>03</td>
<td></td>
<td>F0004 Updated</td>
</tr>
<tr>
<td>06</td>
<td>T1</td>
<td></td>
<td>Category Code 01</td>
<td></td>
<td>0Y</td>
<td></td>
<td>F0004 Updated</td>
</tr>
<tr>
<td>96</td>
<td>PT</td>
<td></td>
<td>Program Type</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>PT</td>
<td>007 Special Program</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>96</td>
<td>SY</td>
<td></td>
<td>Upgrade Planner Systems</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SY</td>
<td>37 Quality Management</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>97</td>
<td>RL</td>
<td></td>
<td>Release Level</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>RL</td>
<td>A7.1 A5/400 Release A7.1</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>98</td>
<td>FN</td>
<td></td>
<td>Function Codes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FN</td>
<td>APPL Everest Application</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FN</td>
<td>BSFN Business Functions</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FN</td>
<td>BSVM Business View</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FN</td>
<td>EVFM Everest Form</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FN</td>
<td>TABLE Table Definition</td>
<td></td>
<td>F0005 Added</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Generic Text Application Key Files Merge**

The Generic Text Application Key files (F00161 and F00162) 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. The Generic Text Application Key Files merge updates the keys in your production data library with current key information in the JDFDATA library. This merge does not produce a report.

**Menus Merge**

The Menus merge:

- Produces a report that lists the menus added to your production data library during the upgrade process

- Produces a report that lists the obsolete menus in your production data library

  NOTE: You can delete the obsolete menus automatically during the upgrade process by setting the Delete Obsolete Menus field in the upgrade planner to 1.

- Updates the Help Instructions Key, Option Control, Option Key, Version, Batch, and Highlight fields on existing menus for specific jobs

  NOTE: The merge does not change your security settings.

- Updates some obsolete programs with replacement programs if possible

- Identifies new and obsolete programs on existing menus

  NOTE: If a program is obsolete, the merge attaches a menu message to the selection that warns you about using an obsolete program.

The upgrade planner lets you update your menus or replace them entirely.

- In final mode, the merge updates all of your menus except where you have customized them. Use final mode if you have customized the standard menus that J.D. Edwards sent to you.

- In replace mode, the merge entirely replaces the J.D. Edwards menus in your production data library with new menus, but retains your custom menus. It changes selections on your custom menus if necessary for the new release. You will lose any custom translations of the J.D. Edwards menus. Use replace mode if you have not changed the J.D. Edwards menus except for adding security.

NOTE: Your security setup for menus and menu selections are not affected when you run the merge in final or replace mode. In addition, the merge replaces all software installation menus (system code 97) regardless of the mode you choose.
Menu Merge Reports

The Menus merge produces three reports:

- Menu Additions
- Obsolete Menus
- Menu Merge Exceptions

The Menu Additions report (R97883B) lists the menus that the merge added to your production data library. Some selections on these menus could be secured because they call jobs that were previously secured in your menu file. An example of the report appears below.

```
Menu Merge Reports

The Menus merge produces three reports:

- Menu Additions
- Obsolete Menus
- Menu Merge Exceptions

The Menu Additions report (R97883B) lists the menus that the merge added to your production data library. Some selections on these menus could be secured because they call jobs that were previously secured in your menu file. An example of the report appears below.

<table>
<thead>
<tr>
<th>Menu Id</th>
<th>Menu Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>G</td>
<td>Master Directory</td>
</tr>
<tr>
<td>G00</td>
<td>General Systems</td>
</tr>
<tr>
<td>G0021</td>
<td>Tax Processing &amp; Reporting</td>
</tr>
<tr>
<td>G00211</td>
<td>EC VAT Processing</td>
</tr>
<tr>
<td>G00212</td>
<td>Japanese Consumption Tax</td>
</tr>
<tr>
<td>G00213</td>
<td>Italian IVA Processing</td>
</tr>
<tr>
<td>G002131</td>
<td>Additional Italian Tax Processing</td>
</tr>
<tr>
<td>G00214</td>
<td>French VAT Processing</td>
</tr>
<tr>
<td>G01</td>
<td>Address Book</td>
</tr>
<tr>
<td>G0121</td>
<td>Periodic Processes</td>
</tr>
<tr>
<td>G0131</td>
<td>A/R Advanced &amp; Technical Operations</td>
</tr>
<tr>
<td>G01311</td>
<td>Address Book Organizational Structure</td>
</tr>
<tr>
<td>G01312</td>
<td>CIF Supplemental Data</td>
</tr>
<tr>
<td>G01313</td>
<td>Batch Address Processing</td>
</tr>
<tr>
<td>G0141</td>
<td>Address Book Setup</td>
</tr>
<tr>
<td>G01411</td>
<td>Address Book Category Codes</td>
</tr>
<tr>
<td>G01412</td>
<td>Who's Who Category Codes</td>
</tr>
<tr>
<td>G02</td>
<td>Electronic Mail</td>
</tr>
<tr>
<td>G03</td>
<td>Accounts Receivable</td>
</tr>
<tr>
<td>G0311</td>
<td>Customer &amp; Invoice Entry</td>
</tr>
<tr>
<td>G03111</td>
<td>Other Invoice &amp; Receipts Entry Methods</td>
</tr>
<tr>
<td>G031111</td>
<td>Other Invoice &amp; Receipts Entry Methods</td>
</tr>
<tr>
<td>G031112</td>
<td>A/R Drafts Daily Operations</td>
</tr>
<tr>
<td>G03112</td>
<td>A/R Draft Remittance &amp; Collection</td>
</tr>
<tr>
<td>G0312</td>
<td>Manual Receipts Processing</td>
</tr>
<tr>
<td>G0313</td>
<td>Automatic Receipts Processing</td>
</tr>
<tr>
<td>G0314</td>
<td>Accounts Receivable Reports</td>
</tr>
<tr>
<td>G0315</td>
<td>Credit &amp; Collection Management</td>
</tr>
<tr>
<td>G03151</td>
<td>Credit Reporting Tapes</td>
</tr>
<tr>
<td>G0321</td>
<td>Periodic Processes</td>
</tr>
</tbody>
</table>
```

Reference 12/99  A8.1  Upgrade  2–17
Merges and Control Files (Reinstallations Only)

The Obsolete Menus report (R97883C) lists J.D. Edwards menus that are obsolete under the release to which you are upgrading. You can delete the obsolete menus automatically during the upgrade process by setting the Delete Obsolete Menus field in the upgrade planner to 1. If you do not set this field to 1, the obsolete menus remain on your system, and the merge updates them as if they are custom menus. J.D. Edwards recommends that you review and remove these menus if possible. An example of the report appears below.

<table>
<thead>
<tr>
<th>Menu Id</th>
<th>Menu Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Master Directory</td>
</tr>
<tr>
<td>A0</td>
<td>General Business Systems</td>
</tr>
<tr>
<td>A001</td>
<td>Other Systems</td>
</tr>
<tr>
<td>A0011</td>
<td>Org. Structure by C.C. Category Codes</td>
</tr>
<tr>
<td>A0012</td>
<td>Organizational Structure by Cost Center</td>
</tr>
<tr>
<td>A0013</td>
<td>Organizational Structure by Position</td>
</tr>
<tr>
<td>A0014</td>
<td>Organizational Structure by Employee</td>
</tr>
<tr>
<td>A0021</td>
<td>Sales, Purchases &amp; VAT Taxes</td>
</tr>
<tr>
<td>A003</td>
<td>Additional Features</td>
</tr>
<tr>
<td>A0031</td>
<td>General System Setup</td>
</tr>
<tr>
<td>A0032</td>
<td>Defining the Organizational Structure</td>
</tr>
<tr>
<td>A0033</td>
<td>Advanced Operations</td>
</tr>
<tr>
<td>A00332</td>
<td>EC VAT Processing</td>
</tr>
<tr>
<td>A00333</td>
<td>Japanese Consumption Tax</td>
</tr>
<tr>
<td>A00334</td>
<td>Italian IVA Processing</td>
</tr>
<tr>
<td>A004</td>
<td>Technical Operations</td>
</tr>
<tr>
<td>A01</td>
<td>Address Book</td>
</tr>
<tr>
<td>A012</td>
<td>Search Word Rebuilds</td>
</tr>
<tr>
<td>A013</td>
<td>Advanced Operations</td>
</tr>
<tr>
<td>A0131</td>
<td>Address Book Setup</td>
</tr>
<tr>
<td>A01311</td>
<td>Address Book Category Codes</td>
</tr>
<tr>
<td>A0132</td>
<td>Who’s Who Category Codes</td>
</tr>
<tr>
<td>A0132</td>
<td>Supplemental Data</td>
</tr>
<tr>
<td>A0133</td>
<td>Batch Input Address Processing</td>
</tr>
</tbody>
</table>

The Menu Merge Exceptions report (R97883A) lists specific changes the merge made to menu selections that you should review before you use them. The issues you need to resolve appear in 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 the menu selection.

*Program may be obsolete.* Indicates that the program shown in the Job to Execute column on the report is obsolete and the merge did not find a program to replace it. The merge attaches a menu message warning to a menu selection that accesses an obsolete program. You should remove the program from the menu unless the program exists in a custom library and you want to use it. You can remove the menu message if necessary.

*Review Security.* Indicates that you must review the added 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. You must add the selection to a menu if you want to use it.

*Opt key/vers not found.* Indicates that the merge did not find the particular form ID or version in your DREAM Writer files. If you determine that you need the form ID or version, then resolve this problem before you run the selection.
An example of the report appears below.

<table>
<thead>
<tr>
<th>Menu Id</th>
<th>Menu Title</th>
<th>S1 Description</th>
<th>Job to Execute</th>
<th>Option Key</th>
<th>Version</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>G08E3</td>
<td>Employee Advanced/Tech Op</td>
<td>Purge Employee Job File</td>
<td>J0601182</td>
<td>P0601182</td>
<td>New pgm for release</td>
<td></td>
</tr>
<tr>
<td>G08E43</td>
<td>International Information Setu</td>
<td>Division Codes</td>
<td>J0006A</td>
<td>P0006A</td>
<td>New pgm for release</td>
<td></td>
</tr>
<tr>
<td>G08H1</td>
<td>Employee History</td>
<td>Create Multiple Job History</td>
<td>J060119</td>
<td>P060119</td>
<td>ZJDE0001 New pgm for release</td>
<td></td>
</tr>
<tr>
<td>G08J1</td>
<td>Job Specifications Setu</td>
<td>Compa–</td>
<td>J082008</td>
<td>P082008</td>
<td>New pgm for release</td>
<td></td>
</tr>
<tr>
<td>G08J4</td>
<td>Job Specifications Setu</td>
<td>EE Master/EE Job File Update</td>
<td>J082008</td>
<td>P082008</td>
<td>New pgm for release</td>
<td></td>
</tr>
<tr>
<td>G08P3</td>
<td>Position Control Advanced/Tech</td>
<td>Requested</td>
<td>(J08902)</td>
<td>P08902</td>
<td>ZJDE0001 New pgm for release</td>
<td></td>
</tr>
<tr>
<td>G08R3</td>
<td>Pay Grade/Step Administration</td>
<td>Create Review Work Group</td>
<td>J082005</td>
<td>P082005</td>
<td>New pgm for release</td>
<td></td>
</tr>
<tr>
<td>G0901</td>
<td>Journal Entry, Reports, &amp; Inqs</td>
<td>Post General Journal</td>
<td>J09900</td>
<td>P09900</td>
<td>ZJDE0001 * Review Security</td>
<td></td>
</tr>
<tr>
<td>G0911</td>
<td>Bank Statement Processing</td>
<td>Post General Journal Batches</td>
<td>J09800</td>
<td>P09800</td>
<td>ZJDE0001 * Review Security</td>
<td></td>
</tr>
<tr>
<td>G0931</td>
<td>G/L Advanced &amp; Technical Op</td>
<td>G/L Cash Forecasting</td>
<td>J09520</td>
<td>P09520</td>
<td>New pgm for release</td>
<td></td>
</tr>
<tr>
<td>G09311</td>
<td>Batch Journal Entry Processing</td>
<td>Journal Entry Field Mapping</td>
<td>J09110MAP</td>
<td>P09110MAP</td>
<td>New pgm for release</td>
<td></td>
</tr>
</tbody>
</table>

Help Instructions Merge

The Help Instructions merge replaces the help information in your production data library with current help information. It does not produce a report.

Generic Message/Rates Merge

The Generic Message/Rates merge is similar to the User Defined Codes merge except that it includes the free form text associated with the rate on the message. The merge:

- Adds new user defined code tables and their values for all system codes
- Adds new user defined code values for existing tables located in system codes 84 through 99 and in system code 00, record type IO

In final mode, the Generic Message/Rates merge does not add new values for existing tables located in system codes 01 through 83. In addition, it does not add new values for system code 00 except for record type IO. You must perform the application specific instructions to make these updates.

NOTE: The User Defined Codes merge must complete successfully before you run this merge.
Generic Rate/Message Update Report

The Generic Rate/Message Update report (R98725) lists all table and code updates, including messages and rates. An example of the report appears below.

<table>
<thead>
<tr>
<th>Code</th>
<th>Code</th>
<th>Description</th>
<th>Description</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>32</td>
<td>EM</td>
<td>Editing Messages</td>
<td></td>
<td>New Rate/Msg Type</td>
</tr>
<tr>
<td></td>
<td>2A</td>
<td>Editing Message</td>
<td></td>
<td>New Rate/Msg Value</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1.00 This is an example of an editing message used for configurator processing.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2.00 If the Bore is greater than 2&quot; (50.8), than the cylinder should be double roded.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>SN</td>
<td>Standard Text</td>
<td></td>
<td>New Rate/Msg Type</td>
</tr>
<tr>
<td></td>
<td>1001</td>
<td>General Assembly Procedure</td>
<td></td>
<td>New Rate/Msg Value</td>
</tr>
<tr>
<td></td>
<td></td>
<td>12.00 This is an example of creating a general assembly procedure that could print out for many parts and processes having to enter it into the system only once.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>13.00 Assemble Component Electrical Harness per the drawing and schematic included with the shop packet.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>14.00 Connect all the hydraulic connections as shown on special attachment sheet HDR-XXXX. (XXXX refers to the part number).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>SN</td>
<td>Quality Control General Proc</td>
<td></td>
<td>New Rate/Msg Value</td>
</tr>
<tr>
<td></td>
<td>1002</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1.00 QUALITY IS JOB ONE!!!!!!!!!!</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2.00 Retrieve Quality Control Checklist from Master File and create duplicate copy for use as permanent file.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3.00 Setup necessary testing equipment. If this is a destructive test step, ensure that Form 817 Quality Scrapped is prepared and authorized.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4.00 Perform Quality Assurance Review as outlined on Document obtained in step 1.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Automatic Accounting Instructions Merge

The Automatic Accounting Instructions merge adds new specifications (for company 00000 only) that were included since you last upgraded your software. The merge adds them without any account number specifications.

NOTE: This merge affects the Automatic Accounting Instructions Master file (F0012). It does not affect the automatic accounting instructions (AAIs) for the Distribution and Payroll systems.

New Automatic Accounting Instructions (AAI) Report

The New Automatic Accounting Instructions (AAI) report (R98727) lists the items that were added to your production data library. Modify them to match your specific accounting structure. An example of the report appears below.

<table>
<thead>
<tr>
<th>Item</th>
<th>Co Number</th>
<th>Sequence</th>
<th>Syst Code</th>
<th>Account Use Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RV</td>
<td>00000</td>
<td>3.335</td>
<td>03</td>
<td>Unrealized Gain on Foreign Currency Payments</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>RVxxx = Currency code</td>
</tr>
<tr>
<td>RW</td>
<td>00000</td>
<td>3.335</td>
<td>03</td>
<td>Unrealized Loss on Foreign Currency Payments</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>xxx = Currency code</td>
</tr>
<tr>
<td>PCWHLD</td>
<td>00000</td>
<td>4.041</td>
<td>04</td>
<td>Withholding Taxes Payable</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>To be used with the A/P</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Calculate Withholding Program</td>
</tr>
<tr>
<td>PV</td>
<td>00000</td>
<td>4.075</td>
<td>04</td>
<td>Unrealized Gain on Foreign Currency Payments</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>PVxxx = Currency Code</td>
</tr>
</tbody>
</table>
The Next Numbers merge adds index lines for existing systems. It also adds index line specifications for new systems. All new next numbers are set initially to 1.

**New Next Numbers Report**

The New Next Numbers report (R98728) lists the new index lines for existing systems and the index line specifications for new systems. An example of the report appears below.

**Run Individual Merges**

The upgrade software lets you run the following merges separate from the main upgrade process:

- Software Versions Repository
- Data Dictionary
- DREAM Writer
- Vocabulary Overrides
- User Defined Codes
- Generic Text Application Keys
- Menus
- Help Instructions
- Generic Message/Rates
- Automatic Accounting Instructions
- Next Numbers
Before you run a merge, you must set up an upgrade plan that specifies to run that merge only. This plan should be based on the upgrade plan you used for the main upgrade process.

**IMPORTANT:** You must run certain merges before you run others. These dependencies are listed below:

- Run the Software Versions Repository merge before you run any other merge.
- Run the User Defined Codes merge before you run the Generic Message/Rates merge.
- Run the DREAM Writer merge before you run the Menus merge.

Perform the following procedures to set up an upgrade plan to run a single merge and to run the merge.

**Set Up the Merge Upgrade Plan**

To run an individual merge, you must set up an upgrade plan to run that merge only. J.D. Edwards recommends you create a new upgrade plan by performing the following steps:

1. Sign on as JDEINSTALL.
   
   The Software Upgrade Menu (A97IBM) appears.

2. Select Work with Upgrade Planner.
   
   The Plan the Upgrade screen appears.

3. In the Action Code field, type I (Inquire).

4. In the Plan Name field, enter the name of the upgrade plan you used for the main upgrade process.
   
   Your plan name cannot exceed nine (9) characters.

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

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

7. In the Description field, enter a description for this plan.

8. In the Action Code field, type I (Inquire).

9. In the Plan Name field, enter the name of the upgrade plan you added.

10. Press F5 to enter upgrade data.

11. From the Libraries for This Plan screen, press Enter.
   
   The Systems to Install/Upgrade screen appears.
12. The Systems to Upgrade field is set to 1 for each system you have purchased. J.D. Edwards strongly recommends that you do not change these values.

13. Press Enter.

The Merge Information screen appears.

14. In each of the merge fields on the left side of the screen (except for the merge you want to run), type 0 (No Merge).

15. In the field for the merge you want to run, type 2 (Final). If you want to run the Help merge, type 3 (Replace) in the Help Master Merge field.

   NOTE: You can set the Menus merge mode to 3 (Replace).

16. After you verify your information, press Enter, and then press F3 (Exit).

17. Sign off.

Run the Merge

To run the merge:

1. Sign on as a user who accesses the production library you want to update.

2. From the Merges menu (G97R41), select Standalone Merges.

   A processing options screen appears.

3. In the first processing option field, type the name of the upgrade plan that is set up to run the specific merge.

4. In the second processing option field, enter *NONE.

   The merge submits to batch.

**IMPORTANT:** If you run the Data Dictionary merge, then you must submit the Rebuild DD/VO job from the Post Upgrade Menu (G97R4) after making your manual changes to the Data Dictionary.
Merges and Control Files (PTFs Only)

This chapter explains control files, which define the basic structure of J.D. Edwards software, and describes the merges that update them. The information in this chapter applies to PTFs only.

Control Files

J.D. Edwards software consists of control files that make up its basic structure. These files organize and sequence the information that you put into the J.D. Edwards system. In addition, the files determine the types of operations to be performed on the input data. For example, the Data Dictionary files (F9200, F9202, F9203, F9204, F9207, F9210, F9816, and F98163) define all specifications for any data item in J.D. Edwards software. Control files differ from transaction files in the following ways:

- Control files contain data that is shared between J.D. Edwards and you, but transaction files contain unique data provided by you only.

- Transaction files can be converted but will never have J.D. Edwards data merged into them.

Many of the control files can be modified by you. For instance, you can change a menu to better suit your business needs. Because you can modify the control files, J.D. Edwards does not automatically modify them with J.D. Edwards data when you perform a PTF installation. The upgrade process for the control files has two general steps:

- Merges – When you run the merges, they automatically add new items to the control files or change certain aspects of the files that are not affected by customization.

- Application Specific Instructions (ASIs) – The ASIs explain how to update those aspects of the files that could contain customized data. For more information about ASIs, see Application Specific Instructions in this publication.

This two-step upgrade process protects your tailored information from being overlaid by J.D. Edwards information.
Merges and Control Files (PTFs Only)

Merge Process Overview

The main upgrade job merges the control files in the J.D. Edwards data library into your existing control files, which are in your common library or production data libraries. After the control file merges complete, you may need to apply application specific instructions (ASIs) to finish updating your control files. For information about ASIs, see Application Specific Instructions in this publication.

The upgrade process submits the merges automatically. If you must submit an individual merge from the Merges menu (G97R41), see Run Individual Merges in this chapter.

Proof and Final Modes

You can run the merges in two ways:

- Proof Mode – Creates merge reports but does not update control files. By using this mode, you can examine the changes that are reported without updating your files.

- Final Mode – Creates merge reports and updates certain aspects of items in the control files.

You specify the modes in which the merges should run on the Merge Information screen in the upgrade planner. For information about setting the modes, see the PTF Install Workbook.

Merge Sequence

The merges are submitted automatically during the PTF installation process. The merges and updates that are submitted automatically include:

- Software Version Repository (J97885)
- Data Dictionary (J97882)
- DREAM Writer (J97886)
- Vocabulary Overrides (J97884)
- User Defined Codes (J97880)
- Generic Text Application Keys (J97888)
- Menus (J97883)
- Help Instructions (J97887)
- Generic Message/Rates (J97881)

NOTE: If you must submit any or all of the above merges manually, you should do so in the order in which they appear above. Some merges require other merges to be run first. For information about how to submit a specific merge and for a list of dependencies, see Run Individual Merges in this chapter. For an explanation about what each merge does, see the appropriate merge section in this chapter.
Software Versions Repository Merge

The Software Versions Repository files (F9801 and F9802) serve together as a master directory of information for all programs, files, screens, reports, and so forth, that exist in your J.D. Edwards software.

The Software Versions Repository merge updates the software versions repository members in your production data library with current member information in the PTF library.

The Software Versions Repository merge:

- Adds new records to the Software Versions Repository Master file (F9801) and the Software Versions Repository Detail file (F9802)
- Prints a report that lists updated members in the software versions repository
- Updates the following fields in existing members:
  - Member ID
  - Description
  - Function Code
  - Install System
  - Reporting System
  - Base Member Name
  - File Prefix
  - Maint/RSTDSP
  - Omit Option
  - Generation Sev (Severity)
  - Copy Data (Y/N)
  - Optional File
  - Common File

If your system has a J.D. Edwards source library, the merge adds records from the Software Versions Repository Detail file (F9802) in the PTF library to your production data library. In addition, the merge updates the following fields in detail records.

- Source Library
- Object Library
Merges and Control Files (PTFs Only)

- Source File
- SAR Number
- Version ID

NOTE: This merge must complete successfully before you run any other merge.

Software Versions Repository Merge Report

The Software Versions Repository Merge Report (R98726A) lists the members in your production data library that are affected by the merge. For each member, the report shows field values as they are before and after the merge. An example of the report appears below.

<table>
<thead>
<tr>
<th>Member ID</th>
<th>Member Description</th>
<th>Inst Sys.</th>
<th>Rpt. Sys.</th>
<th>FN Base</th>
<th>Copy</th>
<th>Optional</th>
<th>Common</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASSET</td>
<td></td>
<td>83</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONVERT</td>
<td>Software Installation - Conver</td>
<td>97</td>
<td>97</td>
<td>J99600</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>C0000</td>
<td></td>
<td>94</td>
<td>94</td>
<td></td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>C0010</td>
<td></td>
<td>98</td>
<td>98</td>
<td></td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>C0015</td>
<td></td>
<td>98</td>
<td>98</td>
<td>N</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C00151</td>
<td></td>
<td>98</td>
<td>98</td>
<td>N</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C00161</td>
<td></td>
<td>98</td>
<td>98</td>
<td>N</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C001610LD</td>
<td></td>
<td>98</td>
<td>98</td>
<td>N</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C0030</td>
<td></td>
<td>98</td>
<td>98</td>
<td>N</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C0036</td>
<td></td>
<td>98</td>
<td>98</td>
<td>N</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C0040N</td>
<td></td>
<td>98</td>
<td>98</td>
<td>N</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C0080</td>
<td></td>
<td>98</td>
<td>98</td>
<td></td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>
Data Dictionary Merge

The Data Dictionary files (F9200, F9202, F9203, F9204, F9207, F9210, F9816, and F98163) serve as the central definition point of all specifications for any data item in J.D. Edwards software. Data items include fields, menu messages, error messages, and help text. The Data Dictionary merge updates the data items in your production data library with current data dictionary information in the PTF library.

In final mode, the merge adds new data items and updates certain fields in your existing data items. It does not update fields in your data items that could contain information you defined for your own specific purposes.

The Data Dictionary merge:

- Adds new data items
- Updates the following fields in existing data items:
  - Alias Name
  - Alias Type
  - Alpha Description
  - Data File Decimals
  - Data Item Class
  - Size
  - Type
  - Glossary Group
  - Help Program
  - Install System Code
  - Item Occurrences
  - Item Parent
  - Next Number Index
  - Next Number System
  - Release Last Changed
  - Reporting System Code
  - Glossary – if requested (does all or none based on your decision)
NOTE: The merge does not distinguish which data items you have tailored for your own purposes. Therefore, the fields listed before this note are updated on all existing data dictionary records. You may want to print the report first to determine what data items will be affected.

The Data Dictionary Merge does not update the following fields. You will make these updates by using the Data Dictionary Merge Report – Manual Changes (R98722). To make these updates, refer to Phase 3 – Update Applications in the PTF Install Workbook.

NOTE: Do not change display decimals for items QTYINV or CURRENCY.

- Column Title
- Display Decimals
- Data Display Parameters
- Data Display Rules
- Data Edit Rules
- Default Values
- Edit Rules Specifications
- Justify
- Row Description
- Language Preference

The Data Dictionary Merge Report – Replaced Changes (R98722A) lists data items that were automatically replaced by the merge.
## Data Dictionary Merge Reports

The Data Dictionary Merge Report – Manual Changes (R98722) lists the manual updates you must make to data items in your production data library. An example of the report appears below.

<table>
<thead>
<tr>
<th>Item</th>
<th>Data Item</th>
<th>Description</th>
<th>Field</th>
<th>Was</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>UDBA</td>
<td>Include in Union Plan</td>
<td>Row Description</td>
<td>Union Deduction/Benefit</td>
<td>Include in Union Plan (Y,N)</td>
<td></td>
</tr>
<tr>
<td>UDB1</td>
<td>Canadian UI - GRS</td>
<td>Row Description</td>
<td>Canadian UI - GRS (Wk1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UDB2</td>
<td>Canadian UI - GRS</td>
<td>Row Description</td>
<td>Canadian UI - GRS (Wk2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UDB3</td>
<td>Canadian UI - Hrs.</td>
<td>Row Description</td>
<td>Canadian UI - Hrs. (Wk1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UDB4</td>
<td>Canadian UI - Hrs.</td>
<td>Row Description</td>
<td>Canadian UI - Hrs. (Wk2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UDB5</td>
<td>Canadian UI - Pay Period</td>
<td>Row Description</td>
<td>Canadian UI - Pay Periods</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UDB6</td>
<td>Canadian UI - Status</td>
<td>Row Description</td>
<td>Canadian Unemployment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UDB7</td>
<td>Quantity Type</td>
<td>Default Value for Entry</td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>UOM2</td>
<td>Secondary Unit of Measure</td>
<td>Row Description</td>
<td>Secondary Unit of Measure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UOM3</td>
<td>Purchasing Unit of Measure</td>
<td>Row Description</td>
<td>Purchasing UOM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UOM4</td>
<td>Pricing Unit of Measure</td>
<td>Row Description</td>
<td>Pricing UOM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UOM5</td>
<td>Shipping Unit of Measure</td>
<td>Row Description</td>
<td>Shipping UOM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UOM6</td>
<td>Open Quantity</td>
<td>Row Description</td>
<td>Open Quantity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UOM7</td>
<td>Received Quantity</td>
<td>Row Description</td>
<td>Received Quantity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VCHR</td>
<td>Payee Voucher Rules</td>
<td>Default Value for Entry</td>
<td></td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>VCST</td>
<td>Vacation Status Display Decimals</td>
<td></td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VEND</td>
<td>Primary / Last Supplier</td>
<td>Row Description</td>
<td>Primary / Last Vendor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VERF</td>
<td>Version Control Fl</td>
<td>Row Description</td>
<td>Vendor Supplier</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Reference 12/99

A8.1 Upgrade 3-7
Merges and Control Files (PTFs Only)

The Data Dictionary Merge Report – Replaced Changes (R98722A) lists the changes that are automatically made to data items in your production data library during the merge. An example of the report appears below.

<table>
<thead>
<tr>
<th>Data Item</th>
<th>Appl Over</th>
<th>Screen Over</th>
<th>Description</th>
<th>Field Size</th>
<th>Was</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>#BBM</td>
<td></td>
<td></td>
<td>Software Security Co</td>
<td>Data Item Size</td>
<td>00006</td>
<td>00010</td>
</tr>
<tr>
<td>#BY</td>
<td></td>
<td></td>
<td>System Code</td>
<td>Data Item Size</td>
<td>00002</td>
<td>00004</td>
</tr>
<tr>
<td>#I1</td>
<td></td>
<td></td>
<td>Quantity</td>
<td>Data Item Class.</td>
<td>QTYINV</td>
<td></td>
</tr>
<tr>
<td>#I2</td>
<td></td>
<td></td>
<td>Amount</td>
<td>Data Item Class.</td>
<td>QTYINV</td>
<td></td>
</tr>
<tr>
<td>#AA</td>
<td></td>
<td></td>
<td>Amount</td>
<td>Data Item Class.</td>
<td>51</td>
<td>88</td>
</tr>
<tr>
<td>#AB</td>
<td></td>
<td></td>
<td>Amount</td>
<td>Data Item Class.</td>
<td>51</td>
<td>88</td>
</tr>
<tr>
<td>#AB4</td>
<td></td>
<td></td>
<td>Percent Gross Profit</td>
<td>System Code</td>
<td>51</td>
<td>88</td>
</tr>
<tr>
<td>#ACA</td>
<td></td>
<td></td>
<td>Asset Cost Account</td>
<td>Data Item Size</td>
<td>00027</td>
<td>00029</td>
</tr>
<tr>
<td>#ACC</td>
<td></td>
<td></td>
<td>Calculated Activity</td>
<td>System Code</td>
<td>70</td>
<td>00</td>
</tr>
<tr>
<td>#ACO</td>
<td></td>
<td></td>
<td>Account Number</td>
<td>Data Item Size</td>
<td>00026</td>
<td>00028</td>
</tr>
<tr>
<td>#ADA</td>
<td></td>
<td></td>
<td>Accumulated Depreciation</td>
<td>Data Item Size</td>
<td>00027</td>
<td>00029</td>
</tr>
<tr>
<td>#ADD</td>
<td></td>
<td></td>
<td>Address Line</td>
<td>Data Item Size</td>
<td>00030</td>
<td>00040</td>
</tr>
<tr>
<td>#ADS</td>
<td></td>
<td></td>
<td>Amount</td>
<td>Data Item Size</td>
<td>00011</td>
<td>00015</td>
</tr>
<tr>
<td>#AID</td>
<td></td>
<td></td>
<td>Item/Tag Number</td>
<td>Help Program</td>
<td>P12IS</td>
<td></td>
</tr>
<tr>
<td>#AL</td>
<td></td>
<td></td>
<td>Name</td>
<td>Data Item Size</td>
<td>00030</td>
<td>00040</td>
</tr>
<tr>
<td>#AIF</td>
<td></td>
<td></td>
<td>Account Number</td>
<td>Data Item Size</td>
<td>00027</td>
<td>00029</td>
</tr>
<tr>
<td>#ANP</td>
<td></td>
<td></td>
<td>Alpha Description</td>
<td>Payroll ID</td>
<td>OBSOLETE</td>
<td></td>
</tr>
<tr>
<td>#AVD</td>
<td></td>
<td></td>
<td>Date</td>
<td>Data Item Class.</td>
<td>15</td>
<td>88</td>
</tr>
<tr>
<td>#AVM</td>
<td></td>
<td></td>
<td>Date</td>
<td>Data Item Class.</td>
<td>15</td>
<td>88</td>
</tr>
<tr>
<td>#AVV</td>
<td></td>
<td></td>
<td>Date</td>
<td>Data Item Class.</td>
<td>15</td>
<td>88</td>
</tr>
<tr>
<td>#A1</td>
<td></td>
<td></td>
<td>Address Line</td>
<td>Data Item Size</td>
<td>00030</td>
<td>00040</td>
</tr>
<tr>
<td>#A10</td>
<td></td>
<td></td>
<td>Item Occurrences</td>
<td>Data Item Type</td>
<td>007</td>
<td>009</td>
</tr>
<tr>
<td>#A11</td>
<td></td>
<td></td>
<td>Address Line</td>
<td>Data Item Type</td>
<td>P</td>
<td>O</td>
</tr>
</tbody>
</table>

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DREAM Writer Merge

The Data Record Extraction and Manipulation facility (DREAM Writer) serves as a powerful data manipulator and cataloging system. DREAM Writer (files F98301, F98302, F98303, F98311, F98312, and F9831) lets you create unlimited variations of standard J.D. Edwards reports and videos. It controls the data records that are selected for the specific version and the sequence of the records as they appear on the printed page.

The DREAM Writer merge updates the DREAM Writer versions in your production data library with current information in the PTF library. It runs off the Software Versions Repository Master file (F9801).

The Software Versions Repository merge must run before the DREAM Writer merge.

For a PTF, the DREAM Writer merge:

- Updates the Based On File, the Format Name, and the Type Report Totaling fields in all versions in your DREAM Writer file with the version ZJDE0001 (or your 0001 version) DREAM Writer information in the PTF library

- Copies the Based On File name to the Format Name for changed versions if the Format Name is blank

- Adds new form IDs and their versions

- Adds new XJDE and new ZJDE versions to existing form IDs

- Replaces existing XJDE versions

- Adds XJDETR versions for J.D. Edwards training

- Replaces processing option text and adds new processing options to existing form IDs

- Updates the following additional fields:
  - File Output Type
  - Override Logical File
  - Open Query File Options (for example, Optimize Option)
  - Print Instructions (Y/N)

The DREAM Writer merge does not make the following updates. You must perform the application specific instructions to make these updates. To do these updates, see Application Specific Instructions in this publication.

- Add or change values in existing processing options (all versions, including DEMO)
Merges and Control Files (PTFs Only)

- Update the following fields:
  - Job To Execute
  - Selection/Sequencing
  - Printer Overrides
  - Version Title/Optional Report Title
  - Print Cover Page (Y/N)
  - Mandatory Processing Option
  - Job Queue
  - User Exclusive (0/1/2/3)
  - Output Media

Merge DREAM Writer Specifications Report

The DREAM Writer Merge Report (R98723) lists, in a general way, DREAM Writer changes and additions. An example of the report appears below.

---

<table>
<thead>
<tr>
<th>Form ID</th>
<th>Change</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>DISTMSG</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>PHRED</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P0001P</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P0003P</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P0005A</td>
<td>File Prefix</td>
<td>Changed</td>
</tr>
<tr>
<td></td>
<td>Format Name</td>
<td>Changed</td>
</tr>
<tr>
<td>P0005CVT</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P0005P</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P0006P</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P0006P</td>
<td>Sequential Only Access</td>
<td>Changed</td>
</tr>
<tr>
<td></td>
<td>Optimize Option</td>
<td>Changed</td>
</tr>
<tr>
<td></td>
<td>Output Open Option</td>
<td>Changed</td>
</tr>
<tr>
<td></td>
<td>Update Option</td>
<td>Changed</td>
</tr>
<tr>
<td></td>
<td>Delete Open Option</td>
<td>Changed</td>
</tr>
<tr>
<td>P0006QP</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P000851</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P00087</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P0008BP</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P0008BP</td>
<td>Sequential Only Access</td>
<td>Changed</td>
</tr>
<tr>
<td></td>
<td>Output Open Option</td>
<td>Changed</td>
</tr>
<tr>
<td></td>
<td>Update Option</td>
<td>Changed</td>
</tr>
<tr>
<td></td>
<td>Delete Open Option</td>
<td>Changed</td>
</tr>
<tr>
<td>P0008BP</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P0008BP</td>
<td>Based On Member</td>
<td>Changed</td>
</tr>
<tr>
<td>P0010P</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P00111</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P0012P</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P0012P</td>
<td>Sequential Only Access</td>
<td>Changed</td>
</tr>
<tr>
<td></td>
<td>Optimize Option</td>
<td>Changed</td>
</tr>
<tr>
<td>P00120</td>
<td>New Program</td>
<td>Added</td>
</tr>
<tr>
<td>P0012P</td>
<td>Based On Member</td>
<td>Changed</td>
</tr>
<tr>
<td></td>
<td>Output Open Option</td>
<td>Changed</td>
</tr>
<tr>
<td></td>
<td>Update Option</td>
<td>Changed</td>
</tr>
</tbody>
</table>
Vocabulary Overrides Merge

The Vocabulary Overrides file (F9220) lets you change the text information on J.D. Edwards screens and reports to reflect your own terminology or language. The Vocabulary Overrides merge updates the vocabulary override records in your production data library with current vocabulary override information in the PTF library.

The merge selects records in the Software Versions Repository Master file (F9801) that have function code DSPF, PRTF, or PRTS, and:

- Adds vocabulary override records for new Display/Printer files
- Changes Line 24 error text and messages, and default screen titles
- Adds new fields to existing vocabulary override records if they have prefix VTX
- Deletes VTX fields that are not delivered in the JDFDATA library.

NOTE: If you have added VTX fields to a video or report with the standard J.D. Edwards name, you could lose VTX fields.

- Updates fields in existing vocabulary override records with new text if the override flags for the fields are either blank or J
- Replaces all function key definitions

In final mode, the merge does not update VTX fields that have a Y in the override field. If changes exist for these fields, you will find them documented in the Vocabulary Overrides Merge report (R98721) you create when you run this merge.

NOTES:

- The Data Dictionary/Vocabulary Overrides/DREAM Writer Rebuild job could replace the text descriptions again with your company-specific text.
- The Vocabulary Overrides merge totally replaces the function key translation files (F9601 and F9611). If these files contain your own custom information, you must enter the information again after the merge completes.

Vocabulary Overrides Merge Reports

The Vocabulary Overrides merge produces two reports. The first Vocabulary Overrides Changed Report (R987212) lists the vocabulary overrides that were changed in your production data library. It shows the following updates.

- New text descriptions for VTX fields
- Overrides added
- VTX fields deleted
- New VTX fields or new screens
This report is provided for your information only. An example of the report appears below.

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Field Name</th>
<th>Old Text Description</th>
<th>New Text Description</th>
<th>Change Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RORTLIB</td>
<td>VTX004</td>
<td>INSTALL</td>
<td></td>
<td>New Video/Report</td>
</tr>
<tr>
<td>R0004P</td>
<td>VTX005</td>
<td>Description</td>
<td>Description</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0004P</td>
<td>VTX006</td>
<td>Code</td>
<td>Code</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0004P</td>
<td>VTX010</td>
<td>(Y/N)</td>
<td>(Y/N)</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0004P</td>
<td>VTX012</td>
<td>User</td>
<td>Use</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0004P</td>
<td>VTX017</td>
<td>Sys</td>
<td>Sys</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0005P</td>
<td>VTX004</td>
<td>INSTALL</td>
<td></td>
<td>New VTX Field</td>
</tr>
<tr>
<td>R0005P</td>
<td>VTX011</td>
<td>Ins</td>
<td></td>
<td>New VTX Field</td>
</tr>
<tr>
<td>R0005P</td>
<td>VTX009</td>
<td>Co</td>
<td>Comp</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0006P</td>
<td>VTX002</td>
<td>P</td>
<td></td>
<td>New VTX Field</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX005</td>
<td>Begin</td>
<td>Begin</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX007</td>
<td>T</td>
<td></td>
<td>New VTX Field</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX008</td>
<td>. . .Period Ending Dates/Centuries. . .</td>
<td></td>
<td>New VTX Field</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX010</td>
<td>Year</td>
<td></td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX011</td>
<td>02/14</td>
<td>02/11/20</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX016</td>
<td>26/38/50</td>
<td>25/38/47</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX017</td>
<td>63/15</td>
<td>03/12/21</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX019</td>
<td>04/16</td>
<td>04/13/22</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX021</td>
<td>31/43</td>
<td>34/43/52</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX022</td>
<td>28/37/49</td>
<td>28/37/46</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX023</td>
<td>01/13</td>
<td>01/10/19</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX024</td>
<td>28/40/52</td>
<td>31/40/49</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX025</td>
<td>05/17</td>
<td>05/14/23</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX026</td>
<td>29/41/53</td>
<td>32/41/50</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX027</td>
<td>06/18</td>
<td>06/15/24</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX028</td>
<td>30/42/54</td>
<td>33/42/51</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX029</td>
<td>07/19</td>
<td>07/16/25</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX030</td>
<td>08/20</td>
<td>08/17/26</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX031</td>
<td>32/44</td>
<td>35/44/53</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX032</td>
<td>09/21</td>
<td>09/18/27</td>
<td>New Text Description</td>
</tr>
<tr>
<td>R0008BP</td>
<td>VTX033</td>
<td>33/45</td>
<td>36/45/54</td>
<td>New Text Description</td>
</tr>
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The Vocabulary Overrides Not Changed Because of Overrides report (R98721) lists VTX fields in your production data library that have a Y in the override field and would have been affected by the merge if the override flags for those fields had been blank or J. The report compares text descriptions for VTX fields in your production data library (Old Text Description) and the PTF library. An example of the report appears below.

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<tr>
<th>Video Name</th>
<th>Field Name</th>
<th>Old Text Description</th>
<th>New Text Description</th>
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<td>Init Elig Table.</td>
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<td>VTX009</td>
<td>Dep/Ben (Y/N)</td>
<td>Depend/Benef (Y/N)</td>
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<td>Cont Elig Table.</td>
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<td>Depend/Benef (Y/N)</td>
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<td>VTX013</td>
<td>Or</td>
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</table>

User Defined Codes Merge

The User Defined Codes files (F0004 and F0005) let you define codes, relate them to code descriptions, and assign values for certain fields. The User Defined Codes merge updates some user defined codes in your production data library with current user defined code information contained in the PTF library.

The User Defined Codes merge:

- Adds new user defined code tables and their values for all system codes
- Adds new user defined code values for existing tables located in system codes 84 through 99 and in system code 00, record type IO
- Updates the user defined code detail text if requested

In final mode, the User Defined Codes merge does not add new values for existing tables located in system codes 01 through 83. In addition, it does not add new values for system code 00 except for record type IO. You must perform the application specific instructions to make these updates. To do these updates, see Application Specific Instructions in this publication.
Merges and Control Files (PTFs Only)

Transfer User Defined Codes Report

The Transfer User Defined Codes report (R98724) lists the user defined codes in your production data library that are affected by the merge. For each user defined code, the report indicates whether the code was added or replaced and shows the updated text descriptions, if any. An example of the report appears below.

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<th>Description 2</th>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td>00</td>
<td>TC</td>
<td></td>
<td>Condition of Transport</td>
<td></td>
<td>2</td>
<td></td>
<td>F0004</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td>TC</td>
<td></td>
<td>CIF Carriage, Insurance, Freight</td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td>TC</td>
<td></td>
<td>DDP Delivered Duty Paid</td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td>TC</td>
<td></td>
<td>DDU Delivered Duty Unpaid</td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td>TC</td>
<td></td>
<td>EXW Ex Works</td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td>TC</td>
<td></td>
<td>FOB Free on Board</td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td>TC</td>
<td></td>
<td>XXX Other</td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td>00</td>
<td>TM</td>
<td></td>
<td>Mode of Transport</td>
<td></td>
<td>2</td>
<td></td>
<td>F0004</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
<tr>
<td></td>
<td>TM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Added</td>
</tr>
</tbody>
</table>
Generic Text Application Key Files Merge

The Generic Text Application Key files (F00161 and F00162) 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. The Generic Text Application Key Files merge updates the keys in your production data library with current key information in the PTF library. This merge does not produce a report.

Menus Merge

The Menus merge:

- Produces a report that lists the menus added to your production data library during the upgrade process.

- Produces a report that compares the menus in your production data library with the menus in the PTF library. You must use this report to update your menus accordingly.

- Adds new menus to your production data library if you run it in final mode.

In final mode, the merge does not update menus that already exist on your system. The updates you should make to existing menus are documented in two areas: the Menu Comparison report (R98340) you create when you run this merge and the application specific instructions. You must create this report to update existing menus. To do these updates, see Application Specific Instructions in this publication.
Menu Comparison Reports

The Menus merge produces two reports. The Menu Additions report (R983402) lists the menus that were added to your production data library. It is provided for your information only. An example of the report appears below.

<table>
<thead>
<tr>
<th>Menu Number</th>
<th>Menu Description</th>
<th>Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>G001</td>
<td>Other Systems</td>
<td>New Menu</td>
</tr>
<tr>
<td>G0015</td>
<td>Italian Legal Reports</td>
<td>New Menu</td>
</tr>
<tr>
<td>G0022</td>
<td>EC VAT Taxes</td>
<td>New Menu</td>
</tr>
<tr>
<td>G0438</td>
<td>Canadian Automated Payment Processing</td>
<td>New Menu</td>
</tr>
<tr>
<td>G0439</td>
<td>UK Automated Payment Processing</td>
<td>New Menu</td>
</tr>
<tr>
<td>G07A2241</td>
<td>Magnetic Media Processing Menu</td>
<td>New Menu</td>
</tr>
<tr>
<td>G07A227</td>
<td>SUI Magnetic Media - 2</td>
<td>New Menu</td>
</tr>
<tr>
<td>G07B2</td>
<td>Wage Attachment Processing</td>
<td>New Menu</td>
</tr>
<tr>
<td>G07H3</td>
<td>Retroactive Payroll Processing</td>
<td>New Menu</td>
</tr>
<tr>
<td>G0804</td>
<td>Technical Position Operations</td>
<td>New Menu</td>
</tr>
<tr>
<td>G08F4</td>
<td>Technical Applicant Operations</td>
<td>New Menu</td>
</tr>
<tr>
<td>G08H15</td>
<td>Flexible Spending Accounts</td>
<td>New Menu</td>
</tr>
<tr>
<td>G08H16</td>
<td>COBRA Compliance</td>
<td>New Menu</td>
</tr>
<tr>
<td>G08H161</td>
<td>COBRA Election Coverage</td>
<td>New Menu</td>
</tr>
<tr>
<td>G08H17</td>
<td>Benefit Nondiscrimination Testing</td>
<td>New Menu</td>
</tr>
<tr>
<td>G08H32</td>
<td>Participant Setup</td>
<td>New Menu</td>
</tr>
<tr>
<td>G08H35</td>
<td>FSA Setup</td>
<td>New Menu</td>
</tr>
<tr>
<td>G08H36</td>
<td>COBRA Setup</td>
<td>New Menu</td>
</tr>
<tr>
<td>G08H37</td>
<td>Benefit Nondiscrimination Testing Setup</td>
<td>New Menu</td>
</tr>
<tr>
<td>G08H4</td>
<td>Technical Plan/Option Operations</td>
<td>New Menu</td>
</tr>
<tr>
<td>G08H45</td>
<td>Flexible Spending Accts - Advanced Ops</td>
<td>New Menu</td>
</tr>
<tr>
<td>G2</td>
<td>Energy Systems</td>
<td>New Menu</td>
</tr>
<tr>
<td>G2011</td>
<td>Production Property Set Up Menu</td>
<td>New Menu</td>
</tr>
<tr>
<td>G2012</td>
<td>Energy Property Reports</td>
<td>New Menu</td>
</tr>
<tr>
<td>G2013</td>
<td>Energy Cross-References</td>
<td>New Menu</td>
</tr>
<tr>
<td>G2016</td>
<td>Accounting Property Set Up</td>
<td>New Menu</td>
</tr>
<tr>
<td>G2017</td>
<td>AFE Master Menu</td>
<td>New Menu</td>
</tr>
<tr>
<td>G2021</td>
<td>Fixed Asset Billing (Energy)</td>
<td>New Menu</td>
</tr>
<tr>
<td>G2031</td>
<td>Energy System Constants</td>
<td>New Menu</td>
</tr>
</tbody>
</table>
The Menu Comparison Report (R98340) indicates with asterisks any differences between the menus in the PTF library and your production data library. The FROM Library Menu column contains menu information from the PTF library, and the TO Library Menu column contains menu information from your production data library.

The report indicates whether menu selections have been rearranged. In addition, it reports DREAM Writer versions that are missing in your production data library (an asterisk appears in the Difference column for Option Key and a detailed message appears in the TO Library Menu column). It only specifies changes that are necessary to the normal function of the menus. You must create this report because you use it later to complete your menu updates. An example of the report appears below.

<table>
<thead>
<tr>
<th>Menu Number</th>
<th>FROM Library</th>
<th>TO Library</th>
<th>Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>G0021</td>
<td>A81PC00001</td>
<td>CLTCOM</td>
<td>Final</td>
</tr>
</tbody>
</table>

The table below shows the differences between the menu selections:

<table>
<thead>
<tr>
<th>Menu Header</th>
<th>Option Key</th>
<th>Description</th>
<th>Job to Execute</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Ops</td>
<td>*G0033</td>
<td></td>
<td>J01051</td>
<td>ZJDE0001</td>
</tr>
<tr>
<td>Menu Selection 02</td>
<td>Menu Selection 02</td>
<td>Tax Authorities</td>
<td>J01051</td>
<td></td>
</tr>
<tr>
<td>Selection Desc</td>
<td>Tax Rate/Areas</td>
<td></td>
<td>J4008</td>
<td>ZJDE0001</td>
</tr>
</tbody>
</table>

Reference 12/99 A8.1 Upgrade 3-17
Help Instructions Merge

The Help Instructions merge replaces the help information in your production data library with current help information. It does not produce a report.
Generic Message/Rates Merge

The Generic Message/Rates merge is similar to the User Defined Codes merge except that it includes the free form text associated with the rate on the message. The merge:

- Adds new user defined code tables and their values for all system codes
- Adds new user defined code values for existing tables located in system codes 84 through 99 and in system code 00, record type IO

In final mode, the Generic Message/Rates merge does not add new values for existing tables located in system codes 01 through 83. In addition, it does not add new values for system code 00 except for record type IO. You must perform the application specific instructions to make these updates.

NOTE: The User Defined Codes merge must complete successfully before you run this merge.

Generic Rate/Message Update Report

The Generic Rate/Message Update report (R98725) lists all table and code updates, including messages and rates. An example of the report appears below.

<table>
<thead>
<tr>
<th>Inst User Code</th>
<th>User Code</th>
<th>Description</th>
<th>Current Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>98725</td>
<td>J.D. Edwards &amp; Company</td>
<td>Generic Message/Rates Update</td>
<td>Date - 2/05/97</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Page - 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>From - A81PCD0001</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>To - PRODDATA</td>
</tr>
<tr>
<td>Inst User Code</td>
<td>User Code</td>
<td>Description</td>
<td>Current Rate</td>
</tr>
<tr>
<td>32 EM</td>
<td></td>
<td>Editing Messages</td>
<td>New Rate/Msg Type</td>
</tr>
<tr>
<td>32 EM 2A</td>
<td></td>
<td>Editing Message</td>
<td>New Rate/Msg Value</td>
</tr>
<tr>
<td></td>
<td>1.00</td>
<td>This is an example of an editing message used for</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.00</td>
<td>configurator processing.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>4.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.00</td>
<td>If the Bore is greater than 2&quot; (50.8), than the cylinder</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.00</td>
<td>should be double roded.</td>
<td></td>
</tr>
<tr>
<td>32 SN</td>
<td></td>
<td>Standard Text</td>
<td>New Rate/Msg Type</td>
</tr>
<tr>
<td>32 SN 1001</td>
<td></td>
<td>General Assembly Procedure</td>
<td>New Rate/Msg Value</td>
</tr>
<tr>
<td></td>
<td>12.00</td>
<td>This is an example of creating a general assembly procedure</td>
<td></td>
</tr>
<tr>
<td></td>
<td>13.00</td>
<td>that could print out for many parts and processes having to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>14.00</td>
<td>enter it into the system only once.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>16.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>17.00</td>
<td>Assemble Component Electrical Harness per the drawing and</td>
<td></td>
</tr>
<tr>
<td></td>
<td>18.00</td>
<td>schematic included with the shop packet.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>19.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>20.00</td>
<td>Connect all the hydraulic connections as shown on special</td>
<td></td>
</tr>
<tr>
<td></td>
<td>21.00</td>
<td>attachment sheet RD8-XXXX. (XXXX refers to the part number).</td>
<td></td>
</tr>
<tr>
<td>32 SN 1002</td>
<td></td>
<td>Quality Control General Proc</td>
<td>New Rate/Msg Value</td>
</tr>
<tr>
<td></td>
<td>1.00</td>
<td>Quality is the only way to go.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.00</td>
<td>QUALITY IS JOB ONE!</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>4.00</td>
<td>Retrieve Quality Control Checklist from Master File</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.00</td>
<td>and create duplicate copy for use as permanent file</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.00</td>
<td>of this procedure.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7.00</td>
<td>Setup necessary testing equipment. If this is a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8.00</td>
<td>destructive test step, ensure that Form 817 Quality</td>
<td></td>
</tr>
<tr>
<td></td>
<td>9.00</td>
<td>Scrapped is prepared and authorized.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10.00</td>
<td>Perform Quality Assurance Review as outlined on Document</td>
<td></td>
</tr>
<tr>
<td></td>
<td>11.00</td>
<td>obtained in step 1.</td>
<td></td>
</tr>
</tbody>
</table>
Run Individual Merges

The upgrade software lets you run the following merges separate from the main PTF installation process:

- Software Versions Repository
- Data Dictionary
- DREAM Writer
- Vocabulary Overrides
- User Defined Codes
- Generic Text Application Keys
- Menus
- Help Instructions
- Generic Message/Rates

Before you run a merge, you must set up an upgrade plan that specifies to run that merge only. This plan should be based on the upgrade plan you used for the main upgrade process.

IMPORTANT: You must run certain merges before you run others. These dependencies are listed below:

- Run the Software Versions Repository merge before you run any other merge.
- Run the User Defined Codes merge before you run the Generic Message/Rates merge.

Perform the following procedures to set up an upgrade plan to run a single merge and to run the merge.

Set Up the Merge Upgrade Plan

To run an individual merge, you must set up an upgrade plan to run that merge only. J.D. Edwards recommends you create a new upgrade plan by performing the following steps:

1. Sign on as JDEINSTAL.

   The Software Upgrade Menu (A97IBM) appears.

2. Select Work with Upgrade Planner.

   The Plan the Upgrade screen appears.

3. In the Action Code field, type I (Inquire).

4. In the Plan Name field, enter the name of the upgrade plan you used for the main upgrade process.

   Your plan name cannot exceed nine (9) characters.

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

6. In the Plan Name field, type a name for the new upgrade plan.
7. In the Description field, enter a description for this plan.

8. In the Action Code field, type I (Inquire).

9. In the Plan Name field, enter the name of the upgrade plan you added.

10. Press F5 to enter upgrade data.

11. From the Libraries for This Plan screen, press Enter.

    The Systems to Install/Upgrade screen appears.

12. The Systems to Upgrade field is set to 1 for each system you have purchased. J.D. Edwards highly recommends that you do not change these values.

13. Press Enter.

    The Merge Information screen appears.

14. In each of the merge fields on the left side of the screen (except for the merge you want to run), type 0 (No Merge).

15. In the field for the merge you want to run, type 2 (Final). If you want to run the Help Merge, type 3 (Replace) in the Help Master Merge field.

16. After you verify your information, press Enter, and then press F3 (Exit).

17. Sign off.

**Run the Merge**

To run the merge:

1. Sign on as a user who accesses the production library you want to update.

2. From the Merges menu (G97R41), select Standalone Merges.

    A processing options screen appears.

3. In the first processing option field, type the name of the upgrade plan that is set up to run the specific merge.

4. In the second processing option field, enter the name of the PTF library (for instance, A81PC000001). Do not use *NONE.

    The merge submits to batch.
Application Specific Instructions

After the upgrade process completes the main control file merges and the application control file conversions, you are ready to apply the application specific instructions (ASIs). These instructions, which were previously called post-installation, application-specific procedures, specify the updates you must make manually to your control files because the merges did not handle them. This chapter describes the ASI procedures you perform to update those aspects of the control files that were not updated by the merges.

NOTE: J.D. Edwards recommends you read all information in this chapter before you apply the ASIs.

About the ASIs

J.D. Edwards has significantly improved and simplified the procedures you follow to make updates to your applications that are not handled automatically by the merges. These updates are reserved for you to make because J.D. Edwards protects any information you may have customized in your production environments.

You apply the ASIs by performing five general steps.

- Access the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF)
- Create the ASI Report
- Print the ASIs

NOTE: You can also print the ASIs from the Software Upgrade Menu (A97IBM) before you begin the upgrade process.

- Display a list of ASIs on the Work With Instructions (ASIs) screen
- Apply the ASIs to your production library

During the automatic portion of the upgrade process, you will receive the message You may now sign on using your JDE User Profile to continue. The upgrade process sends this message when the main control file merges and the application control file conversions complete. You can apply the ASIs at this time.

IMPORTANT: Do not begin to apply ASIs until you receive this message.
Access the Post Upgrade Menu or PTF Post Upgrade Menu

These menus include selections for ASI procedures. To access these menus:

1. Sign on as a user who accesses the production library you want to update.
2. From any J.D. Edwards menu, enter G97R4 (for re installations) or G97PTF (for PTFs).

Print the ASIs

The Application Specific Instructions (ASI) report (R98490) lists all of the ASIs for the applications you have on your machine. You will use the printed report later in this chapter to update your application systems.

The report sequences the ASIs by:

- Release Level (for example, A81)
- Reporting System Code
- ASI Type (for example, AA, DW, MN, and so on)

Because the report is produced through a DREAM Writer version, you can resequence the report by modifying a copy of this version.

To create the report:

1. Select Create ASI Report from the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF).
2. After you read the message screen that appears, press F6.

   The DREAM Writer data selection screen for Print Instructions (ASIs) appears.
3. Make sure that the value is set to the correct release level (for example, A81) for re installations or the correct PTF level (for example, A81PC00001). If you are upgrading your software from release level A7.2, you must create separate reports for release levels A7.3 and A8.1. If you are upgrading from A7.1, you must create reports for A7.2, A7.3, and A8.1. If you are upgrading from A6.2, you must create reports for A7.1, A7.2, A7.3, and A8.1.

   After you press Enter, the report job submits to batch for processing.

To print the report:

1. Select Print ASIs & Special Job Rpt from the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF).

   NOTE: If you did not create the Special Jobs Report (R97454) from the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF), then this selection will list only the ASI Report (R98490).
2. Print the ASI Report (R98490).

An example of the report appears below.

<table>
<thead>
<tr>
<th>CODE</th>
<th>DESCRIPTION</th>
<th>DESCRIPTION-2</th>
</tr>
</thead>
<tbody>
<tr>
<td>0102</td>
<td>PDBA Code does not exist</td>
<td></td>
</tr>
</tbody>
</table>

Reason: The description for error code 0102 was changed to refer to PDBA Code instead of Pay Type.

From the General User Defined Codes screen (P00051), change the following Character code.

--------------------------------- ---
<table>
<thead>
<tr>
<th>DW</th>
<th>Release . . . A81</th>
<th>Reporting System . 41B</th>
</tr>
</thead>
<tbody>
<tr>
<td>P0005A</td>
<td>Priority . . . 1 Bulk Inventory Management</td>
<td></td>
</tr>
</tbody>
</table>

DREAM Writers

Form ID: P0005A | Version Number: 2JDE4902

Reason: System code was changed from 4150 to 41B.

From the Processing Options Revisions screen:

<table>
<thead>
<tr>
<th>PROCESSING OPTION NUMBER</th>
<th>NEW VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>41B</td>
</tr>
</tbody>
</table>
You can display detailed ASI information and apply the ASIs to your production libraries by using the Work With Instructions (ASIs) screen. To access this screen, select Work With Instructions (ASIs) from the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF). After you read the message screen that appears, press F6. The Work With Instructions (ASIs) screen appears as shown below.

The following table explains the fields on the Work With Instructions (ASIs) screen.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting System</td>
<td>The code for the application system you want to list ASIs for. If you want to list all ASIs related to the applications you have on your machine, leave this field blank.</td>
</tr>
<tr>
<td>Release</td>
<td>The software release level, such as A81, you want to list ASIs for.</td>
</tr>
<tr>
<td>Types</td>
<td>The types of ASIs you want to list (up to five). Valid types include:</td>
</tr>
<tr>
<td></td>
<td>AA Automatic Accounting Instructions</td>
</tr>
<tr>
<td></td>
<td>DW DREAM Writer</td>
</tr>
<tr>
<td></td>
<td>UD User Defined Codes</td>
</tr>
<tr>
<td></td>
<td>WW World Writer</td>
</tr>
<tr>
<td>New Software Library (From)</td>
<td>The name of the reinstallation library (usually JDFDATA) or the PTF library that contains the information by which you will update your production libraries.</td>
</tr>
<tr>
<td>FIELD</td>
<td>EXPLANATION</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>ASI Status Selection</td>
<td>A selection code that lets you list ASIs according to status. Valid codes are:</td>
</tr>
<tr>
<td>X</td>
<td>List ASIs that have been applied.</td>
</tr>
<tr>
<td>blank</td>
<td>List ASIs that have not been applied.</td>
</tr>
<tr>
<td>*</td>
<td>List all ASIs, regardless of status.</td>
</tr>
<tr>
<td>1</td>
<td>For future use.</td>
</tr>
<tr>
<td>Current Common Data Library (To)</td>
<td>The name of the common library that contains the files you want to update, such as the DREAM Writer file (F98301). If you do not have a common library, you should specify the production library that contains the F98301 file.</td>
</tr>
<tr>
<td>Current World Writer Library (To)</td>
<td>The name of the production data library that contains the World Writer file (F82100) you want to update. If you are not updating World Writer, you can leave this field blank.</td>
</tr>
<tr>
<td>OP (Option)</td>
<td>If you specify a 3 in this field, the item referred to by the ASI is copied from JDFDATA (for reinstallations) or the PTF library to your production library without displaying the ASI detail. You cannot copy automatic accounting instructions (AAIs), or next numbers. Some ASI types, such as DW, require additional information before you can copy it. If you specify a 4, the ASI is selected for detailed display. If you leave this field blank, the ASI is not displayed.</td>
</tr>
<tr>
<td>SY CD (System Code)</td>
<td>The code that identifies the application system the item is assigned to. This code can have up to four digits.</td>
</tr>
<tr>
<td>Type</td>
<td>The type of ASI, such as user defined codes, next numbers, and so on.</td>
</tr>
<tr>
<td>Item</td>
<td>The identifying name of the particular item the ASI affects. The following items are examples of each type.</td>
</tr>
<tr>
<td>GLG6</td>
<td>Automatic accounting instruction (AAI) item number</td>
</tr>
<tr>
<td>P98330</td>
<td>DREAM Writer form ID</td>
</tr>
<tr>
<td>98SY</td>
<td>User defined code system and record type</td>
</tr>
<tr>
<td>Q01</td>
<td>World Writer group ID</td>
</tr>
<tr>
<td>Last Updated</td>
<td>The last library location where the ASI was applied.</td>
</tr>
</tbody>
</table>
Display a List of ASIs (Default Sequence)

The Work With Instructions (ASIs) screen lets you display the ASIs that apply to your production environment. The screen displays the ASIs in the same sequence as the ASI report if you accept the default sequences for both of them.

To display the ASIs according to the default sequencing:

1. Type the release level, such as A81, in the Release field for which you want ASIs displayed.

2. Type the name of JDFDATA (for reinstallations) or the PTF library in the New Software Library (From) field.

3. Type the name of the common or production library you want to update in the Current Common Data Library (To) field.

4. If you need to update World Writer, type the name of the production library that contains the World Writer file you want to update in the Current World Writer Library (To) field.

5. Press Enter.

Display a List of ASIs (Custom Sequence)

To display the ASIs in a customized sequence:

1. Type a system code in the Reporting System field if you want to display ASIs for a specific application system only.

2. Type a release level, such as A81, in the Release field if you want to display ASIs for a specific release level only.

3. Type up to five ASI types in the Types field if you want to display only some of the available ASIs.

4. Type the name of JDFDATA (for reinstallations) or the PTF library in the New Software Library (From) field.

5. Type a selection code in the ASI Status Selection field.

6. Type the name of the common or production library you want to update in the Current Common Data Library (To) field.

7. Press Enter.
Apply the ASIs

You can approach applying ASIs in one of three ways.

- Copy selected items from JDFDATA (for reinstallations) or the PTF library to your production library without displaying the ASI detail. This method, which can save you time, is described under Copy Selected Items Without Displaying ASI Detail in this chapter. J.D. Edwards recommends you use this method only if you are an experienced installer with few customization concerns.

- Select individual ASIs for detailed display. Use this method when you want to examine the detail of individual ASIs before you apply them (manually or by automatic copy). This method is described under Display Detailed ASI Information in this chapter. Applying the ASIs is described under Apply the ASIs After Displaying Detail.

- Select all ASIs for detailed display. Use this shortcut method when you want to examine the detail of all ASIs before you apply them (manually or by automatic copy). This method is described under Display Detailed ASI Information in this chapter. Applying the ASIs is described under Apply the ASIs After Displaying Detail.

Copy Selected Items Without Displaying ASI Detail

If you have few customization concerns, you can copy an entire item referred to by an ASI from JDFDATA (for reinstallations) or the PTF library to your production library without displaying the ASI detail. This procedure will save you valuable time while applying the ASIs to your environment.

1. Read the detailed information printed on the Application Specific Instructions (ASI) report (R98490) to identify those ASIs you know you can copy safely (little or no customization).

   NOTE: The copy function does not work for automatic accounting instructions (AAIs) or next numbers, so do not select them for copying.

2. From the Work With Instructions (ASIs) screen, type 3 (Copy) in the OP (Option) field next to the ASIs you identified to copy.

   NOTE: You can specify options 3 (Copy) and 4 (Select ASI) in a mixed way on the Work With Instructions (ASIs) screen, which could save you even more time. For more information about option 4 (Select ASI), see Display Detailed ASI Information in this chapter.

3. Press Enter. ASIs you selected with option 3 (Copy) will be copied automatically. Some ASI types require you to provide additional information before copying can proceed.
Display Detailed ASI Information

You can select either all ASIs or specific ASIs for full display from the Work With Instructions (ASIs) screen.

1. If you want to select all ASIs, press F5 (Select ALL ASI). If you want to select specific ASIs, type 4 (Select ASI) in the OP (Option) field next to the ASIs you want to display.

2. Press Enter. The detailed information for the first selected ASI appears.

   NOTE: Each time you press Enter, the next ASI’s detailed information appears. This occurs until you have displayed the last selected ASI. If you want to stop displaying selected ASIs, press F3 (Exit).

Typically, the detailed information for an ASI includes:

- A list of field names associated with an item and affected by the update
- The values as they should appear in those fields

You will update the item in your production library to reflect these values. An example of an ASI’s detailed information follows.

<table>
<thead>
<tr>
<th>CHAR. CODE</th>
<th>DESCRIPTION</th>
<th>DESCRIPTION-2</th>
</tr>
</thead>
<tbody>
<tr>
<td>0102</td>
<td>PDBA Code does not exist</td>
<td></td>
</tr>
</tbody>
</table>

Enter=Go to Next ASI F6=Copy New to Prod F10=Chg Prod F11=View New F24=More
Apply the ASIs After Displaying Detail

After you display the detailed ASI information for an item, you can apply the update information to the item in your production library in one of two ways.

- Copy the entire item from JDFDATA library (for reinstallations) or the PTF library to your production data library.
- Manually type the update information, which is listed in the detailed ASI information on your screen or on your ASI report (R98490), on the update screen appropriate for the item.

To copy the entire item to your production data library:

1. Press F6 (Copy New to Prod) while the detailed ASI information for the item you want to update is displayed. The Record Transfer screen appears.

   NOTE: If you are not sure whether you have customized an item, you can press F11 (View New) to display the item as it appears in JDFDATA or the PTF library. Compare this item with the same item in your production library.

2. Verify the name of the J.D. Edwards data library (PTF library or JDFDATA for reinstallations) in the From Library field.

3. Verify the name of the library in the To Library field. This library should contain the item associated with the ASI.

4. Verify the item name that appears, such as user defined code 98/SY in the User Defined Codes Sys and Type fields. You need to provide additional information for DREAM Writer and World Writer items.

5. Press Enter.

6. If you selected more than one ASI, press Enter to display the detailed ASI information for the next item.

To manually update the item:

1. Press F10 (Chg Prod) while the detailed ASI information for the item you want to update is displayed. The appropriate update screen for the item appears.

2. Update the item information. This publication assumes you know how to use these screens to update the items.

3. After you verify the information you changed, press Enter.

4. Press F3 (Exit) to return to the detail screen for the ASI you applied.

5. If you selected more than one ASI, press Enter to display the detailed ASI information for the next item.
Run Additional Jobs

After you complete the ASIs, you must run some additional jobs from the Post Upgrade Menu (G97R4) for reinstallations or the PTF Post Upgrade Menu (G97PTF) for PTFs. You must run the jobs in the order given below.

- Rebuild DD/VO
- Build New Files List
- Create New Files
- Rebuild Menu Word Search
- Run Special Application Jobs

For more information about running these jobs, refer to Phase 4 – Create Files and Run Jobs in the Reinstall Workbook or the PTF Install Workbook.
Optional Procedures

After you complete the upgrade process and perform the ASIs, you can perform the following optional procedures:

- Rebuild the Disk Catalog. This creates the Video Disk Catalog file (F98990). The file catalogs all libraries on your system.
- Rebuild the Cross-Reference Index. This updates the information you need in order to use the cross-reference search facility and the menu flow chart facility.
- Create the Optional File Report. This report lists all files that are identified as optional. Based on the file description, you can choose to delete the file from your environment, which makes more space available on your machine.

NOTE: You do not need to perform these procedures in order to run your J.D. Edwards software normally. You can perform them sometime after you perform the upgrade procedures.

Rebuild the Disk Catalog

The Rebuild Disk Catalog procedure creates the Video Disk Catalog file (F98990). When you run this program, all libraries on your system are cataloged in this file. You should run this job in batch, which will take between four and six hours to complete depending on the number of objects and libraries you have.

Submit the Job

To rebuild the disk catalog:

1. Sign on as JDE.
2. Select Disk Catalog from the Rebuilds & Global Updates menu (G9642).
3. After you read the message screen that appears, press F6. The Rebuilds & Global Updates menu reappears and the Video Disk Catalog file is then built in JDFDATA.
Rebuild the Cross-Reference Index

The Rebuild Cross-Reference Index procedure updates the information you need in order to use the cross-reference search facility and the menu flow chart facility.

NOTE: Before you submit the Rebuild Cross-Reference Index job, you must be sure the F98001, F98002, and F98003 files exist on your system.

It will require significant time to run the job against all systems (estimate 8 to 14 hours). However, after you initially do this, you can maintain the index by updating certain parts of it (significantly less run time). You must have the J.D. Edwards source library (JDFSRC) on your machine to run this job.

Submit the Job

To rebuild the cross-reference index globally for all systems:

1. Sign on to the production environment you want to run the job against.

2. Select Cross-Ref Index from the Rebuilds & Global Updates menu (G9642).

3. After you read the message screen that appears, press F6. The versions list for the Cross-Ref Index form ID appears.

4. Type 1 (Run) in the O (Option) field next to version XJDE0001 (Build Cross-Reference – All Systems).

To rebuild the cross-reference index partially (for a specific system, program, video, or file):

1. Sign on to the production environment you want to run the job against.

2. Select Cross-Ref Index from the Rebuilds & Global Updates menu (G9642).

3. After you read the message screen that appears, press F6. The versions list for the Cross-Ref Index form ID appears.

4. Type 3 in the O (Option) field next to one of the following versions:

<table>
<thead>
<tr>
<th>Version</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>XJDE0002</td>
<td>Build Cross-Reference – One System</td>
</tr>
<tr>
<td>XJDE0003</td>
<td>Build Cross-Reference – One Program</td>
</tr>
<tr>
<td>XJDE0004</td>
<td>Build Cross-Reference – One Video</td>
</tr>
<tr>
<td>XJDE0005</td>
<td>Build Cross-Reference – One File</td>
</tr>
</tbody>
</table>

5. Press Enter until the Processing Options Revisions screen appears.

6. Enter Y in the third processing options field if you want to include any programs called by another program being updated in the index. The Data Selection screen appears.
7. Use the Member, Function Code, and/or Install System Code fields on the Data Selection screen to specify what objects to include in the rebuild job.

8. Press Enter until the Versions List screen appears again.

9. Type 1 (Run) in the O (Option) field next to the version you just created.

Create the Optional File Report (R989760)

The Optional File Report (R989760) lists all files that are identified as optional. Based on the report information, you can make more disk space available by deleting any files that are not relevant to your environment. For example, if a particular file is required for foreign currency (system 11) but you do not have international transactions, you can delete the file by using the Optional Files Workbench. You can access the workbench from the Data Base Management menu (G9645).

Run the Report

To run the Optional File Report:

1. Be sure you are signed on as JDE.

2. Select Optional Files Report from the Data Base Management menu (G9645). A processing options screen appears.

3. In the input fields, specify the name of each library you want to run the report against.

4. After you verify your selections, press Enter to run the report. An example of the report follows:

---

**Create the Optional File Report (R989760)**

The Optional File Report (R989760) lists all files that are identified as optional. Based on the report information, you can make more disk space available by deleting any files that are not relevant to your environment. For example, if a particular file is required for foreign currency (system 11) but you do not have international transactions, you can delete the file by using the Optional Files Workbench. You can access the workbench from the Data Base Management menu (G9645).

**Run the Report**

To run the Optional File Report:

1. Be sure you are signed on as JDE.

2. Select Optional Files Report from the Data Base Management menu (G9645). A processing options screen appears.

3. In the input fields, specify the name of each library you want to run the report against.

4. After you verify your selections, press Enter to run the report. An example of the report follows:

---

**Create the Optional File Report (R989760)**

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**Run the Report**

To run the Optional File Report:

1. Be sure you are signed on as JDE.

2. Select Optional Files Report from the Data Base Management menu (G9645). A processing options screen appears.

3. In the input fields, specify the name of each library you want to run the report against.

4. After you verify your selections, press Enter to run the report. An example of the report follows:

---

**Create the Optional File Report (R989760)**

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**Run the Report**

To run the Optional File Report:

1. Be sure you are signed on as JDE.

2. Select Optional Files Report from the Data Base Management menu (G9645). A processing options screen appears.

3. In the input fields, specify the name of each library you want to run the report against.

4. After you verify your selections, press Enter to run the report. An example of the report follows:

---

**Create the Optional File Report (R989760)**

The Optional File Report (R989760) lists all files that are identified as optional. Based on the report information, you can make more disk space available by deleting any files that are not relevant to your environment. For example, if a particular file is required for foreign currency (system 11) but you do not have international transactions, you can delete the file by using the Optional Files Workbench. You can access the workbench from the Data Base Management menu (G9645).

**Run the Report**

To run the Optional File Report:

1. Be sure you are signed on as JDE.

2. Select Optional Files Report from the Data Base Management menu (G9645). A processing options screen appears.

3. In the input fields, specify the name of each library you want to run the report against.

4. After you verify your selections, press Enter to run the report. An example of the report follows:
Optional Procedures

5. Notice that the first file in the sample list is used for Service Billing only. If the Service Billing system was not in your environment, you would want to delete this file. Delete the files that are not relevant to your environment by using the Optional Files Workbench. You can access the workbench from the Data Base Management menu (G9645).
File Conversion

This chapter describes the file conversions that occur during the upgrade process and the sequence in which they occur.

Overview

Each file to be converted, except for "other files" and "special files," is assigned a conversion type in the File Conversion Scheduler file (P97201). The file conversion type determines the conversion group to which the file belongs. A file's group classification determines when the upgrade process will convert it. The following illustration shows how the various file conversion types are grouped.

File Conversion Process Flow

Group 1 conversions include main control files (type CTF) and application control files (ACF). Group 2 conversions include large and small program files (BIG and LTL respectively), and other files that must be converted but are not assigned a conversion type in the File Conversion Scheduler file. Group 3 conversions include special files. The following sections describe each file conversion type and the order in which file conversions occur.
File Conversion

Conversion Types

Each file that the upgrade process converts is classified according to file conversion type in the File Conversion Scheduler file, except for “other files” and “special files.” The file conversion types are described below. The type designation that is used in the scheduler is in parentheses.

Main Control Files (CTF)

The main control files make up the basic overall structure of J.D. Edwards software. The application control files and files in groups 2 and 3 may depend on information in the main control files. Main control files include, for instance, the Software Versions Repository files (F9801 and F9802) and the DREAM Writer files (F98301, F98311, F98312, and F9831).

Application Control Files (ACF)

The application control files are similar to the main control files but are specific to applications generally. They may depend on information in the main control files. Files in groups 2 and 3 may depend on information in the application control files. Application control files include, for instance, the Date Fiscal Patterns file (F0008) and the Company Constants file (F0010).

Large Program Files (BIG)

The large program files are main data files, such as the Accounts Receivable Ledger file (F0311) and the Accounts Payable Ledger file (F0411). They may depend on information in group 1. The large program files do not depend on information in any other file in group 2. Files in group 3 may depend on information in the large program files.

Small Program Files (LTL)

The small program files are secondary data files, such as the Batch A/R Cash Application file (F0312) and the Bank Statement Detail file (F0917). They may depend on file information in group 1. The small program files do not depend on information in any other file in group 2. Files in group 3 may depend on information in the small program files.

Other Files

Other files include those that must be converted but are not scheduled in the File Conversion Scheduler. These files are converted as follows:

1. Your files and corresponding data are copied from your production data library to a work library, and then they are deleted from the production data library.

2. The structures of the new files are copied from the J.D. Edwards data library (usually JDFDATA).

3. Your file data only, which was copied to the work library, is copied back to your production data library by using CPYF *MAP *DROP.

These files do not depend on information in any other file in group 2. Files in group 3 may depend on information in these files.
Special Files

Special files have unique conversion characteristics that differentiate them from all other file conversion types. An example is distribution flex files, which you will convert when you run special application jobs in Phase 4 – Create Files and Run Jobs in the Reinstall Workbook.

Conversion Sequence

Each group of file conversions must process completely before the next group can start. For instance, group 1 files must finish before group 2 files begin. The conversion sequence of the various types of files is explained below according to group.

Group 1 Conversions

The CTFs and ACFs convert automatically during the second step of the upgrade process. Each file converts one at a time beginning with the CTFs and then the ACFs. After all files in group 1 convert completely and the merges finish, you can begin to apply the application specific instructions (ASIs), which are explained in Application Specific Instructions in this publication. After group 1 conversions finish, group 2 conversions begin automatically.

Group 2 Conversions

The BIG, LTL, and other files convert automatically during the second step of the upgrade process after group 1 conversions finish. These conversions run simultaneously. After group 2 conversions finish, you can run group 3 conversions from the Post Upgrade Menu (G97R4).

Group 3 Conversions

You can run the special file conversions from the Post Upgrade Menu (G97R4).

IMPORTANT: Be sure to create any new files that appear on the New Files List Report (R97452) before you run the special jobs. For information about the report and creating the new files, refer to Phase 4 – Create Files and Run Jobs in the Reinstall Workbook.

To run the special application jobs, refer to Phase 4 – Create Files and Run Jobs in the Reinstall Workbook.
File Conversion

File Conversion Scheduler Report

This report (R97203) shows all the files that are scheduled to convert, except “other files.” To create the report, select Print File Conversion Schedule from the Software Upgrade Menu (A971BM). After you select to print the report, your screen will display a DREAM Writer versions list. Add a new version based on version ZJDE0001 and change the Data Selections screen so that Plan Name is equal to the appropriate plan name. Run this new version of the report. An example of the report appears below.

<table>
<thead>
<tr>
<th>Environment</th>
<th>Inst Name</th>
<th>Object Name</th>
<th>Pro Type</th>
<th>Seq Type</th>
<th>Type</th>
<th>Type Level</th>
<th>Level</th>
<th>Files Used</th>
<th>St</th>
<th>Run Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST908</td>
<td>J001061</td>
<td>ACF 001</td>
<td>CALL</td>
<td>*NONE</td>
<td>*ALL</td>
<td>*PGM A62</td>
<td>A81</td>
<td>F0010</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEST908</td>
<td>J000861</td>
<td>ACF 001</td>
<td>CALL</td>
<td>*NONE</td>
<td>*ALL</td>
<td>*PGM A62</td>
<td>A81</td>
<td>F0008</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEST908</td>
<td>J031161</td>
<td>BIG 001</td>
<td>SBM</td>
<td>*NONE</td>
<td>*ALL</td>
<td>*PGM A62</td>
<td>A81</td>
<td>F0311</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEST908</td>
<td>J041161</td>
<td>BIG 001</td>
<td>SBM</td>
<td>*NONE</td>
<td>*ALL</td>
<td>*PGM A62</td>
<td>A81</td>
<td>F0411</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEST908</td>
<td>J4801AX</td>
<td>BIG 001</td>
<td>SBM</td>
<td>*NONE</td>
<td>*ALL</td>
<td>*PGM A62</td>
<td>A81</td>
<td>F4801</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEST908</td>
<td>J090261</td>
<td>BIG 001</td>
<td>SBM</td>
<td>*NONE</td>
<td>*ALL</td>
<td>*PGM A62</td>
<td>A81</td>
<td>F0902</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEST908</td>
<td>J091161</td>
<td>BIG 001</td>
<td>SBM</td>
<td>*NONE</td>
<td>*ALL</td>
<td>*PGM A62</td>
<td>A81</td>
<td>F0911</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEST908</td>
<td>J09112161</td>
<td>BIG 001</td>
<td>SBM</td>
<td>*NONE</td>
<td>*ALL</td>
<td>*PGM A62</td>
<td>A81</td>
<td>F091121</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEST908</td>
<td>J002661</td>
<td>LTL 001</td>
<td>SBM</td>
<td>*NONE</td>
<td>*ALL</td>
<td>*PGM A62</td>
<td>A81</td>
<td>F0026</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEST908</td>
<td>J000661</td>
<td>LTL 001</td>
<td>SBM</td>
<td>*NONE</td>
<td>*ALL</td>
<td>*PGM A62</td>
<td>A81</td>
<td>F0006</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
World Writer Conversion

This chapter explains how to analyze your World Writer versions to determine those that need to be converted for A8.1 use. It also describes how to convert World Writer versions that are able to be converted automatically, and how to examine the results of the analysis or conversion by using the conversion workbench.

World Writer Analysis

Follow this procedure to analyze your World Writer versions for conversion.


   98312 World Writer Analysis/Conv Form ID. . . . P97493
   World Writer/DREAM Writer Conversion Version. . . . ZJDE0001
   Display Level. 4

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

   PROCESSING MODE:
   Enter a "P" to process versions in Proof mode or a "U" to process versions in Update mode.

   ERROR LOGGING:
   Enter a "1" to log only the first error or an "A" to log all errors.

   FROM RELEASE:
   Enter the release from which the upgrade occurred (ex: A62).

   TO RELEASE:
   Enter the release to which the upgrade occurred.
2. In the Processing Mode field, type U (for update mode) if you want to automatically convert versions that pass the analysis test. Type P (for proof mode) if you do not want to convert them at this time. To save time, you may want to submit the analysis in proof mode during the day, and then in update mode at night.

NOTE: You can convert the versions individually (manually or automatically) by using the conversion workbench.

3. When a version does not pass the analysis test, the reasons are written to an error log. In the Error Logging field, type 1 if you want to log only the first error for each version. Type A to log all errors.

NOTE: If you choose to log all errors, analysis will take slightly longer, but the complete error log would be helpful for manual conversion. J.D. Edwards recommends that you log all errors.

4. In the From Release field, type the release level you are upgrading from (for example, A71).

5. In the To Release field, enter A81. The job submits to batch.

You can view the results of the World Writer analysis by using the conversion workbench.

Conversion Workbench

The conversion workbench lets you view the results of the World Writer analysis. The workbench lists World Writer versions that you must convert for A8.1 use. It indicates the versions you can convert automatically, and those you must convert manually because of errors.
To access the conversion workbench, select Conversion Workbench from the World Writer Conversion menu (G97R47). The Conversion Workbench screen appears.

The following table explains the fields on the Conversion Workbench screen.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>WW: Form ID</td>
<td>The query group for which you want to begin to list World Writer records. The list will begin with records for this query group and will continue with records for query groups that follow. To list all World Writer records, leave this field blank.</td>
</tr>
<tr>
<td>Analysis Status (top part of screen)</td>
<td>The analysis status code for which you want to list World Writer records. This code is assigned to each record by the World Writer analysis. Valid codes include:</td>
</tr>
<tr>
<td></td>
<td>F List records that failed analysis</td>
</tr>
<tr>
<td></td>
<td>P List records that passed analysis</td>
</tr>
<tr>
<td></td>
<td>R List records that need post-analysis review</td>
</tr>
</tbody>
</table>

To list all World Writer records, leave this field blank.
<table>
<thead>
<tr>
<th>FIELD</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Status (top part of screen)</td>
<td>The update status code for which you want to list World Writer records. This code indicates the current conversion status of a World Writer version. Valid codes include:</td>
</tr>
<tr>
<td></td>
<td>A List records that are being analyzed or converted currently</td>
</tr>
<tr>
<td></td>
<td>C List records that have been converted automatically</td>
</tr>
<tr>
<td></td>
<td>M List records that have been converted manually (may not mean that a change actually was made to the record)</td>
</tr>
<tr>
<td></td>
<td>S List records that have been submitted for analysis/conversion, but are not active</td>
</tr>
<tr>
<td></td>
<td>* List all records regardless of update status</td>
</tr>
<tr>
<td>blank</td>
<td>List records that need to be converted</td>
</tr>
<tr>
<td>OP (Option)</td>
<td>If you specify a 1 in this field (only applicable for records with analysis status of F), a Report File Conversion Window appears that lists the causes for the failure. For the descriptions of error codes, see Error Explanations in this chapter.</td>
</tr>
<tr>
<td></td>
<td>If you specify a 2 (only applicable for records with analysis status of P or R), the record submits for automatic conversion.</td>
</tr>
<tr>
<td></td>
<td>If you specify a 3, a versions list appears from which you can manually change a World Writer version.</td>
</tr>
<tr>
<td></td>
<td>If you specify a 9, the record submits for re-analysis.</td>
</tr>
<tr>
<td>Query Group</td>
<td>The query group for the World Writer version.</td>
</tr>
<tr>
<td>Version ID</td>
<td>The name of the World Writer version.</td>
</tr>
<tr>
<td>Description</td>
<td>The title of the World Writer version.</td>
</tr>
</tbody>
</table>
**Suggested Use**

J.D. Edwards recommends that you analyze and convert your World Writer versions by following these procedures.

1. Perform the World Writer analysis in update mode and with error logging set to A (All). Records that are assigned an analysis status code of P or R are converted automatically, but records with a status code of F are not converted.

2. From the conversion workbench, display the warnings for World Writer versions that have an analysis status code of R (use option 1 on the Conversion Workbench screen).

3. After displaying the warnings, change the report writer versions if necessary (use option 3).

4. For World Writer versions that have an analysis status code of F, determine the causes of failure (use option 1).
World Writer Conversion

5. For the failed World Writer versions, manually correct the specific errors that appear in the error log (use option 3).

6. Resubmit the corrected version for analysis (use option 9).

   NOTE: If the error explanation indicates that you must convert the version manually (see Error Explanations), do not perform this step and the one that follows.

7. If the corrected version passes the analysis, submit it for automatic conversion (use option 2).

   NOTES:
   
   o Instead of converting the corrected versions automatically, you can do so manually if it is more efficient.
   
   o **IMPORTANT:** If you use option 3 next to a record on the Conversion Workbench screen, the update status will be changed to M whether you make a manual change or not. You still must convert those records that have not been updated.
   
   o If a report converts, but produces unexpected results, examine the join file criteria, and the data selection and the sort/totaling specifications.

**Error Explanations**

The following table explains the errors that could appear in the Report File Conversion Window.

NOTE: Errors stop the conversion process, but warnings do not.

<table>
<thead>
<tr>
<th>ERROR AND EXPLANATION</th>
<th>ERROR/WARNING</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Error text:</strong> Too many records for calculation field.</td>
<td>Error</td>
</tr>
<tr>
<td><strong>Explanation:</strong> The maximum number of lines per field for calculation specifications (4) was exceeded in the original version. Correct the calculation specifications.</td>
<td></td>
</tr>
<tr>
<td><strong>Error text:</strong> New field name too long.</td>
<td>Error</td>
</tr>
<tr>
<td><strong>Explanation:</strong> The new field name for the converted presumptive join data item exceeds ten bytes. Delete this field from the output specifications because it cannot be used.</td>
<td></td>
</tr>
<tr>
<td><strong>Error text:</strong> Presumptive join item not found in D.D.</td>
<td>Error</td>
</tr>
<tr>
<td><strong>Explanation:</strong> This presumptive join data item is no longer supported in the data dictionary. Delete this field from the output specifications because it cannot be used.</td>
<td></td>
</tr>
</tbody>
</table>
ERROR AND EXPLANATION

Error text: File not specified in S.V.R.
Explanation: One of the selected files is not in the software versions repository. You must convert this version manually.

Error text: Cannot determine file join relationship.
Explanation: A file must be added to support converted fields, but there is more than one way to join them. Specify the new file and the file join criteria in the version.

Error text: ATTENTION: Obsolete date field deleted.
Explanation: This date field no longer exists because of the Julian date conversion. The field was automatically deleted from your version if you submitted the version for conversion.

Error text: ATTENTION: Obsolete field deleted.
Explanation: This field no longer exists. The field was automatically deleted from your version if you submitted the version for conversion.

Error text: Output field calc specs unconvertible.
Explanation: A syntax error exists in your calculation specifications. Correct the error.

Error text: WARNING: Field may be obsolete.
Explanation: A field was detected in your calculation specifications that did not require conversion. Verify that this field exists because it could be obsolete.

Error text: WARNING: Review file join.
Explanation: Two files were joined by using a non-primary key. Verify that the join is correct.

Error text: More than one option for field conversn.
Explanation: The file that previously contained this field has been normalized into more than one file. This field has been exported to at least two different files. You must convert this version manually.
Error Log Reports

The error log reports provide you with the same warning and error information that appears in the Report File Conversion window. In addition, original field values are provided for warnings that are issued because an obsolete field was deleted.

To run an error log report:


2. You can use one of the versions of this report provided by J.D. Edwards, which let you list errors or warnings by user or query group, or you can create your own version. To run the report, enter 1 (Run) in the OP (Option) field next to the version you want to run.
Install a New Application System

You can install new application systems separate from the normal installation process. However, J.D. Edwards assumes your J.D. Edwards software is at release level A8.1 currently.

You install new systems by performing the following general steps:

- Obtain an authorization code for the new application systems
- Perform the LODRUN Command
- Set up an upgrade plan to install the new application systems only
- Start the installation
- Update the menus
- Create new files
- Review the installation reports

Obtain an Authorization Code for the New Application Systems

Before you install a new application system, you must obtain an authorization code for the new system from J.D. Edwards Contracts during normal business hours.

Perform the LODRUN Command

You must load the new installation library (JDEINSTAL) from the media labeled LODRUN. To do this, perform the LODRUN procedure in *Phase 1 – Plan the Upgrade* in the Reinstall Workbook.

NOTE: If J.D. Edwards has not sent you an updated set of the media labeled LODRUN for release level A8.1, perform the LODRUN procedure from your original set.

IMPORTANT: To load the new installation library, you must be signed on as QSECOFR.
Set Up the Upgrade Plan

Before you install a new system, you must set up an upgrade plan that is designed to install the new system.

MULTI-PLANS: If you want to install the new system to multiple environments, you must set up an upgrade plan for each environment. Each environment must share the same J.D. Edwards object and data libraries (usually JDFOBJ and JDFDATA). You will use only one plan when you install the new system, but you will use all the plans when you create new files.

1. Sign on as JDEINSTAL. The Software Upgrade Menu (A97IBM) appears.

2. Select Work with Upgrade Planner. The Plan the Upgrade screen appears.

3. In the Action Code field, type I (Inquire).

4. In the Plan Name field, type the name of the upgrade plan you used to install or upgrade the environment in which you want the new system installed. Press Enter.

   Your plan name cannot exceed nine (9) characters.

5. Press F5 to enter upgrade data.

The Libraries for This Plan screen appears.

6. Make sure the Current JDE Release Level field and the New JDE Release Level field are set to A81.

7. Choose whether to install object and data only, or source also.
8. If you make changes to this screen, press Enter twice. Otherwise, press Enter once.

The Systems to Install/Upgrade screen appears.

<table>
<thead>
<tr>
<th>I/O</th>
<th>SYS</th>
<th>NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>00</td>
<td>WORLD FOUNDATION ENVIRONMENT</td>
<td></td>
</tr>
<tr>
<td>01</td>
<td>ADDRESS BOOK</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>ELECTRONIC MAIL</td>
<td></td>
</tr>
<tr>
<td>03</td>
<td>ACCOUNTS RECEIVABLE</td>
<td></td>
</tr>
<tr>
<td>04</td>
<td>ACCOUNTS PAYABLE</td>
<td></td>
</tr>
<tr>
<td>05</td>
<td>STANDALONE TIME ACCOUNTING</td>
<td></td>
</tr>
<tr>
<td>07</td>
<td>PAYROLL</td>
<td></td>
</tr>
<tr>
<td>08</td>
<td>HUMAN RESOURCES</td>
<td></td>
</tr>
</tbody>
</table>

Select only the new systems you want to install. Deselect all other systems. To deselect a system for installation, you must use a zero (0). Do not use a blank. If a system you want to install does not appear on this screen, contact J.D. Edwards Contracts to obtain authorization for the system.

9. Press Enter twice and then press F3 to exit the upgrade planner. It is not necessary to review or change the settings on the Merge Information screen or Advanced Options screen because the installation process does not use them.

## Install the New System

After you have completed the upgrade plan, you are ready to start installing the new system.

1. The J.D. Edwards data library (usually JDFDATA) in your upgrade plan must contain at least the following files:

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>F0082</td>
<td>F0092</td>
<td>F0095</td>
</tr>
<tr>
<td>F00821</td>
<td>F0093</td>
<td>F9801</td>
</tr>
<tr>
<td>F0083</td>
<td>F0094</td>
<td>F9802</td>
</tr>
</tbody>
</table>

These files may not exist if you removed the J.D. Edwards data library or altered it. If any of these files do not exist in the library, you must restore them from your backup copy of the JDFDATA library. If you do not have a backup copy, you can restore the files from your media sets. For instructions, see Appendix A.
2. Sign on as JDEINSTAL. The Software Upgrade Menu (A97IBM) appears.

3. Sign off all users. You must have exclusive access to all J.D. Edwards software.

4. Select Start the Upgrade. The JDE Upgrade Command (JDEUPGRADE) screen appears.

<table>
<thead>
<tr>
<th>JDE UPGRADE COMMAND (JDEUPGRADE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TYPE CHOICES, PRESS ENTER.</td>
</tr>
<tr>
<td>UPGRADE TYPE . . . . . . . . . .</td>
</tr>
<tr>
<td>PLAN NAME . . . . . . . . . .</td>
</tr>
<tr>
<td>SOURCE MEDIA . . . . . . . .</td>
</tr>
<tr>
<td>MEDIA . . . . . . . . . .</td>
</tr>
<tr>
<td>CURRENT JDE RELEASE LEVEL . . .</td>
</tr>
<tr>
<td>NEW JDE RELEASE LEVEL . . .</td>
</tr>
<tr>
<td>RUN VALIDATOR PROGRAM . . . . .</td>
</tr>
<tr>
<td>HOLD INSTALL JOB ON JOB QUEUE .</td>
</tr>
</tbody>
</table>

5. In the Upgrade Type field, enter *INSTALL. This restores objects only.

   After pressing Enter, the Run Validator Program field (highlighted) appears on your screen.

6. In the Plan Name field, type the name of your upgrade plan.

   MULTI-PLANS: Because the plans you have set up share the same J.D. Edwards object and data libraries (usually JDFOBJ and JDFDATA), type the name of only one plan.

7. In the Source Media field, type your device name.

8. The Media field defaults to 0. If you are installing from CD-ROM, change this field to 1.

9. In the Current JDE Release Level field, type A81.

10. In the New JDE Release Level field, type A81.

11. After you verify the information on this screen, press Enter to start the installation process.

12. A period of time after you press Enter, the IBM Display Messages screen appears and asks you whether a specific tape or CD is loaded for a particular system. This message may appear several times during the installation process. Respond to this message and any others as appropriate.
13. The first part of the installation process (INS_STEP1) restores the software, and sends you messages as it completes each system. The second part of the installation process (INS_STEP2), which performs some miscellaneous tasks, begins automatically. You will receive a JDELIJE message during this part. Do not continue until you receive the message JOB xxxxxx/JDEINSTAL/INS_STEP2 completed normally.

14. Sign off as JDEINSTAL.

**Update the Menus**

After the installation process completes, you must update the menus.

NOTE: If you are a new client as of A8.1, you can skip this procedure.

MULTI-PLANS: If you are installing the new system to multiple environments that do not share the same menu file (F0082, F00821, and F0083), you must set up multiple plans and perform this procedure for each menu file.

1. Set up an upgrade plan to run the Menus merge only. For instructions about setting up the plan, see Run Individual Merges under Merges and Control Files (Reinstallations Only) in this publication.

   NOTE: You do not need to run the Software Versions Repository merge first.

2. To run the Menus merge, you must sign on as a user that accesses the production environment.

3. From the Merges menu (G97R41), select Standalone Merges to run the Menus merge. For instructions, see Run Individual Merges under Merges and Control Files (Reinstallations Only) in this publication.

   NOTE: The Standalone Merges selection creates a Menu Merge Exceptions report (R97883A) that lists critical changes made to the menus.

4. After you run the Menus merge, print the Menu Merge Exceptions report (R97883A). For a description of this report, see Menus Merge under Merges and Control Files (Reinstallations Only) in this publication.

5. Update each menu that appears on the report by either copying the entire menu from the J.D. Edwards data library (type JDF in your upgrade plan) or updating individual menu selections. To copy a menu, select Copy DD,VO,DW,UDC,SVR, Menus from the Control File Updates menu (G97R6) and provide the required information. To update a menu selection, select Menu Selections from the Control File Updates menu (G97R6) and make the appropriate changes.
Build the New Files List Report

You will use this report to create new files in the next section.

MULTI-PLANS: If you are installing the new system to multiple environments, you must perform this procedure and the next one (Create New Files below) for each plan. Complete both procedures for a plan before you repeat them for the next plan.

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

2. After you read the message screen that appears, press F6. The Build New Files List screen appears.

3. In the blank field, enter the name of the upgrade plan you used to install the new application system. The report submits to batch.

4. Print the New Files List Report (R97452).

   NOTE: If this procedure did not generate a report, you do not need to create any new files. In this case, you can skip the next section because you have finished installing the new system.

Create New Files

Typically, you must create some new files when you install a new system.

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

2. After you read the message screen that appears, press F6. The Create New Files in Environ. screen appears.

3. In the Plan Name field, type the name of the upgrade plan you used to install the new application system.

4. In the Com/Prod/*ALL field, type C to show all the common files. If you do not have a common library, type an asterisk (*) in this field.

5. In the Create In Library field, type the name of the library in which you want the files created. If you have a common library, type the common library name. If you do not, type a production data library name.

6. After you verify your selections, press Enter. Your screen lists the files you must create.
7. Press F5 to use the defaults J.D. Edwards provides to indicate whether each file should be created with or without data.

8. After you verify the information, press Enter. The files are submitted to batch to be duplicated from the library in the FROM field to the library in the Create In Library field.

9. If you created new files in a common library in the previous steps, you must repeat those steps to create any remaining files in your production data library. You must list the new files for production data libraries by typing P in the Com/Pro/*ALL field on the Create New Files in Environ. screen.

**Review the Installation Reports**

After you have created the new files, you should review the various reports the system produced.

1. At the command entry line, enter WRKSBMJOB.

2. From the Work with Submitted Jobs screen, in the OP fields next to all jobs INS_STEP1 and INS_STEP2, enter 8 (Work with Spooled Files).

3. From the Work with Job Spooled Files screen, display or print the job log (QPJOBLOG) and any other reports that are listed.

**Applying the PTF Tape**

After you install the new system(s), you must reapply your current PTF to this environment. This must be done so that the objects in your new system(s) will be at the same PTF level as the objects of your original systems.

Perform all procedures in the PTF Installation Workbook with the following exception:

- In Phase 3, apply only the ASI's that relate to your new system(s). You have already applied all other ASI's to your other systems when you initially installed the PTF
Convert Multiple Production Environments

This chapter provides you with three methods to convert more than one production environment. Read the method assumptions in this chapter to determine which method is the most appropriate for your situation. After you determine the method you will use, proceed to Preliminary Procedures for All Methods, and then the procedures for the appropriate method, in this chapter. All methods assume you will upgrade to alternate environments, and then you will use the alternate environments to upgrade your production environments.

Each method requires you to create two sets of upgrade plans: one that you will use to upgrade the alternate environments, and the other to upgrade your production environments. You will create your upgrade plans by copying plans provided by J.D. Edwards and changing the new plans to fit your environments.

NOTE: The library names you use in your environments are probably different than the ones used in this chapter. Examine the assumptions and perform the procedures with your library names in mind.

Method Assumptions

J.D. Edwards recommends you follow one of three methods to convert your multiple environments. The method you select depends on which approach best describes your situation. Read the method assumptions and select the most appropriate method.

NOTE: The libraries that appear in the illustrations in this section represent the following types of libraries:

- CLTDTA: Your production data library
- CLTCOM: Your common library
- CLTSEC: Your security library
- JDFOBJ: J.D. Edwards object library
- JDFDATA: J.D. Edwards data library
- JDFSRC: J.D. Edwards source library

The library list for your production environment would look similar to those in one of the illustrations, but your list would not include the J.D. Edwards data library (JDFDATA).

All the methods assume that your security files (F0092, F0093, F0094, and F00921) and their logicals are in the security library (library type SEC in your upgrade plans).
Assumptions for Method A

- Multiple environments exist where each environment has its own production data library, but shares the same common, object, security, source (optional), and J.D. Edwards data libraries with the other environment.

- Each production data library contains the Generic Message/Rates files (F0019, F00191, and F00192) and their associated logical files.

- The shared common library contains all of the following files:

  F0004    F0083    F9205    F9816
  F0005    F81901   F9220    F98163
  F0016    F81902   F9601    F98301
  F00161   F9200    F9611    F98302
  F00162   F9201    F9620    F98303
  F00163   F9202    F9621    F9831
  F0082    F9203    F9801    F98311
  F00821   F9204    F9802    F98312

  F126* (if you have system 12)
  F83* (if you have system 83)

  Logical files associated with any of the above files
Assumptions for Method B

- Multiple environments exist where each environment has its own production data library and common library, but shares the same object, security, source (optional), and J.D. Edwards data libraries with the other environment.

![Diagram showing Environment 1 and Environment 2 with overlapping data]

Assumptions for Method C

- Multiple environments exist where each environment has its own production data library, but shares the same common, object, security, source (optional), and J.D. Edwards data libraries with the other environment. In this scenario, the production libraries contain one or more of the following files defined as common by J.D. Edwards:

  F0004  F0083  F9205  F9816
  F0005  F81901 F9220  F98163
  F0016  F81902 F9601  F98301
  F00161 F9200  F9611  F98302
  F00162 F9201  F9620  F98303
  F00163 F9202  F9621  F9831
  F0082  F9203  F9801  F98311
  F00821 F9204  F9802  F98312

  F126* (if you have system 12)
  F83* (if you have system 83)

Logical files associated with any of the above files

- Each production data library contains the Generic Message/Rates files (F0019, F00191, and F00192) and their associated logical files.

- The shared common library contains the remaining common files.

Preliminary Procedures for All Methods

Perform these procedures before you begin Method A, B, or C.

- Issue the LODRUN command to install the upgrade planner.
- Print the ASI Report.
- Print the special application jobs information.
- Create the alternate environments.
- Change the QJDF data area for the alternate environments.
- Create or modify user profiles to access the alternate environments.
- Change the J.D. Edwards user profile to access the alternate J.D. Edwards libraries.

Detailed instructions for these procedures are given in *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*. 
Procedures for Method A

If you meet the conditions for Method A described earlier, follow these procedures.

IMPORTANT: Be sure you have completed Preliminary Procedures for All Methods earlier in this chapter before you start this method.

Set Up the Upgrade Plans for the Alternate Environments

You must first set up two upgrade plans: one that you will use to upgrade the entire first alternate environment, and another that you will use to convert the production data library in the second alternate environment. To set up your plans, refer to Phase 1 – Plan the Upgrade in the Reinstall Workbook.

Environment One

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE_A1. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is as it appears in the ZJDE_A1 model.

   Your plan name cannot exceed nine (9) characters.

   Leave the value in the Install Object/Data Libraries field set to 1. If you want to install source, change the value in the Install Source Library field to 1. Change the library names to match those that are in your first environment. If you currently are at software release level A7.1, A7.2, or A7.3, change the value in the Current JDE Release Level field.
Convert Multiple Production Environments

NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

```
96003X  REINSTALL LANGUAGE EXCEPTION

PLAN NAME: ZJDE_ALT
CODED CHARACTER SET (CCSID) MISMATCH

DATA DICTIONARY FILE (F9201) CCSID . . . : 00285
DREAM WRITER FILE (F98301) CCSID . . . : 00037
QCHRID SYSTEM VALUE CCSID. . . . . . . : 00037
REINSTALL MUST USE CCSID OTHER THAN 65535.
P LEASE ENTER CCSID VALUE TO USE. . . . : 00285
ENTER=CONTINUE  F3=EXIT  F12=PRV SCRN
```

2. On the Systems to Install/Upgrade screen, the Systems to Upgrade field is set to 1 for each system you have purchased. J.D. Edwards highly recommends that you install or upgrade all systems you have purchased.

**IMPORTANT:** If the systems that appear on this screen are not what you expect, contact J.D. Edwards Worldwide Customer Support.

If you change this screen so that systems are deselected, and inquire on the plan later, this screen will display the systems as they appeared before you made the changes. Whenever you inquire on the plan, you must change it again to omit the specific systems.

**NOTE:** If you have purchased the InterTrans Logistics SMS/400 product or the Data Systems International WorldRF product, select the systems assigned to the product. The J.D. Edwards reinstallation process restores the libraries for these systems, but it does not perform the product installation. For product installation procedures, refer to the *Strategic Alliance Products Installation Workbook*.

3. Verify the library names on the Merge Information screen. J.D. Edwards recommends that you do not change the merge modes.

**NOTE:** Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.

4. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*. 

---

*Upgrade 9–6  A8.1 Reference 12/99*
Environment Two

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE_A2. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is as it appears in the ZJDE_A2 model.

   Your plan name cannot exceed nine (9) characters.

   ![Plan Upgrade Screen](image)

   Leave the values in the Install Source Library and Install Object/Data Libraries fields set to 0. Change the library names to match those that are in your second environment. If you currently are at software release level A7.1, A7.2, or A7.3, change the value in the Current JDE Release Level field.

   NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

   ![Reinstall Language Exception](image)

2. The systems you select on the Systems to Install/Upgrade screen must be the same as those you selected for your first environment.
Convert Multiple Production Environments

3. Do not change the merge modes on the Merge Information screen. Most merge modes are set to 0 because the merges will run against the common library when you upgrade the first environment. The generic message/rates merge mode is set to 2 to allow the second set of generic message/rates in the second data library to be updated. Additionally, if your automatic accounting instructions and next number files are located in the second data library change their merge modes to 2.

Verify the library names on the Merge Information screen.

NOTE: Do not change the values in the Run Control File Conversion, Update Data Dictionary Glossary, User Defined Codes Detail Text Update, and Delete Obsolete Menus fields on the Advanced Options screen. The Run Control File Conversion field is set to 1 to convert any necessary control files that will not convert when the first environment is upgraded. This conversion will affect only those files that were not converted already.

4. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to Phase 1 – Plan the Upgrade in the Reinstall Workbook.
Upgrade the Alternate Environments

After you create your upgrade plans, you are ready to upgrade your alternate environments.

1. Perform these procedures before you begin to upgrade the environments.
   - Be sure no one is signed on to the alternate environments you will be upgrading.
   - Move custom objects.
   - Back up libraries.
   - Perform system-specific procedures for each environment if they apply to you.

   Detailed instructions for these procedures are given at the end of Phase 1 – Plan the Upgrade in the Reinstall Workbook.

2. Perform the procedures in Phase 2 – Upgrade the Alternate Environment in the Reinstall Workbook. Do not proceed to the next step until you receive the message You may now sign on using your JDE profile to continue.

3. Sign on to the first alternate environment by using the profile that you set up earlier.

4. Perform the procedures in Phase 3 – Update Applications in the Reinstall Workbook.

5. Perform the procedures in Phase 4 – Create Files and Run Jobs in the Reinstall Workbook.

6. Perform the procedures in Phase 5 – Review Reports in the Reinstall Workbook with the following guidelines.
   - Resolve any file conversion errors before proceeding.
   - You can begin testing this environment while you continue with the following steps to upgrade your second alternate environment.

7. Sign on to the second alternate environment by using the profile that you set up earlier.

8. Perform the procedures in Phase 3 – Update Applications in the Reinstall Workbook with the following guidelines.
   - Do not print the Menu Merge Exceptions report, the Data Dictionary Merge Report, and the User Defined Codes Merge Report because the merges associated with these reports did not run for this plan.
   - Print the New Automatic Accounting Instructions (AAI) report and apply the changes only if the AAI merge ran for the second alternate environment.
Convert Multiple Production Environments

- Apply only the ASIs for World Writer to the alternate data library specified in your second plan. If you selected to run the merges for automatic accounting instructions (AAIs) and next numbers (NN), then perform the ASIs for the AAI and NN files.

- Do not apply any other ASIs. They were applied when you upgraded the first alternate environment.

9. Perform the procedures in Phase 4 – *Create Files and Run Jobs* in the Reinstall Workbook with the following guidelines.

- Do not run the Rebuild DD/VO and Rebuild Menu Word Search jobs. These were done when you upgraded the first alternate environment.

- Run the Build New Files List job.

- Create the new files in the alternate data library only. Common files were created when you upgraded the first alternate environment.

- Run the special application jobs.


**Set Up the Upgrade Plans for the Production Environments**

To set up an upgrade plan for each of your production environments, refer to Phase 6 – *Upgrade the Production Environment* in the Reinstall Workbook.

**Upgrade the Production Environments**

After you test the alternate environments, you will use them to upgrade your production environments.

1. Upgrade your first environment according to the procedures in Phase 6 – *Upgrade the Production Environment* in the Reinstall Workbook with the following guidelines.

   - Perform all procedures up to and including the *Create files, run jobs, and review reinstalation reports* checklist item.

   - Do not perform the remaining checklist items in Phase 6 at this time.

2. Sign on to your second production environment by using the profile that you set up earlier.
3. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook* with the following guidelines.
   - Do not print the Menu Merge Exceptions report, the Data Dictionary Merge Report, the User Defined Codes Merge Report, and do not update the menu, data dictionary, and user defined code files. These steps were done when you upgraded the first production environment.
   - Print the New Automatic Accounting Instructions (AAI) report and apply the changes only if the AAI merge ran for the second alternate environment.
   - Apply only the ASIs for World Writer to the production data library specified in your second plan. If you selected to run the merges for the AAI and NN files, then apply the ASIs for these files. The remaining ASIs were applied when you upgraded the first production environment.

4. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook* with the following guidelines.
   - Do not run the Rebuild DD/VO and Rebuild Menu Word Search jobs. These were done when you upgraded the first production environment.
   - Run the Build New Files List job.
   - Create the new files in the production data library only. Common files were created when you upgraded the first production environment.

5. Perform the procedures in *Phase 5 – Review Reports* in the *Reinstall Workbook*.

6. Perform the following procedures in *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook*.
   - Change the J.D. Edwards system values.
   - Change the J.D. Edwards profile.
   - Change the IBM user profile JDE.
   - Rename the J.D. Edwards libraries.
   - Rename the alternate libraries.
   - Start the J.D. Edwards subsystems.

7. You are now ready to operate your production environments at release level A8.1.
Procedures for Method B

If you meet the conditions for Method B described earlier, follow these procedures.

**IMPORTANT:** Be sure you have completed *Preliminary Procedures for All Methods* earlier in this chapter before you start this method.

Set Up the Upgrade Plans for the Alternate Environments

You must first set up two upgrade plans: one that you will use to upgrade the entire first alternate environment, and another that you will use to convert the production data and common libraries in the second alternate environment. To set up your plans, refer to *Phase 1 – Plan the Upgrade* in the Reinstall Workbook.

**Environment One**

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE_B1. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is as it appears in the ZJDE_B1 model.

   Your plan name cannot exceed nine (9) characters.

   ![Plan the Upgrade Screen](image)

   **LIBRARIES FOR THIS PLAN**

   **LIB** **LIBRARY** **LIBRARY**
   **TYP** **NAME** **DESCRIPTION**
   **COM** **ALTCOM1** **CLIENT’S ALT COMMON LIBRARY #1**
   **DAT** **ALTDATA** **CLIENT’S ALT DATA LIBRARY #1**
   **SEC** **ALTSEC** **CLIENT’S ALT SECURITY LIBRARY**
   **JDF** **JDFDTAALT** **JDE DATA LIBRARY (ALTERNATE)**
   **OBJ** **JDOBJALT** **JDE OBJECT LIBRARY (ALTERNATE)**
   **SRC** **JDFSRCALT** **JDE SOURCE LIBRARY (ALTERNATE)**

   Leave the value in the Install Object/Data Libraries field set to 1. If you want to install source, change the value in the Install Source Library field to 1. Change the library names to match those that are in your first environment. If you currently are at software release level A7.1, A7.2, or A7.3, change the value in the Current JDE Release Level field.
NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

2. On the Systems to Install/Upgrade screen, the Systems to Upgrade field is set to 1 for each system you have purchased. J.D. Edwards highly recommends that you install or upgrade all systems you have purchased.

**IMPORTANT:** The Systems to Upgrade field is set to 1 for each application system you are licensed to use. Verify that all of the systems you expect to upgrade are selected. For assistance, contact J.D. Edwards Worldwide Customer Support.

NOTE: If you have purchased the InterTrans Logistics SMS/400 product or the Data Systems International WorldRF product, select the systems assigned to the product. The J.D. Edwards reinstallation process restores the libraries for these systems, but it does not perform the product installation. For product installation procedures, refer to the *Strategic Alliance Products Installation Workbook.*

3. Verify the library names on the Merge Information screen. J.D. Edwards recommends that you do not change the merge modes.

NOTE: Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.

4. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook.*
Environment Two

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE_B2. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is as it appears in the ZJDE_B2 model.

   Your plan name cannot exceed nine (9) characters.

   Leave the values in the Install Source Library and Install Object/Data Libraries fields set to 0. Change the library names to match those that are in your second environment. If you currently are at software release level A7.1, A7.2, or A7.3, change the value in the Current JDE Release Level field.

   NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

   **NOTE:** If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

   Plan Name: ZJDE_ALT
   
   **CODED CHARACTER SET (CCSID) MISMATCH**
   
   **DATA DICTIONARY FILE (F9201) CCSID**: 00285
   **DREAM WRITER FILE (F98301) CCSID**: 00037
   **QCHRID SYSTEM VALUE CCSID**: 00037
   
   REINSTALL MUST USE CCSID OTHER THAN 65535.
   
   PLEASE ENTER CCSID VALUE TO USE: 00285
2. The systems you select on the Systems to Install/Upgrade screen must be the same as those you selected for your first environment.

3. Verify the library names on the Merge Information screen. J.D. Edwards recommends that you do not change the merge modes.

   NOTE: Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.

4. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to Phase 1 – Plan the Upgrade in the Reinstall Workbook.

Upgrade the Alternate Environments

After you create your upgrade plans, you are ready to upgrade your alternate environments.

1. Perform these procedures before you begin to upgrade the environments.
   
   ○ Be sure no one is signed on to the alternate environments you will be upgrading.
   
   ○ Move custom objects.
   
   ○ Back up libraries.
   
   ○ Perform system-specific procedures for each environment if they apply to you.

   Detailed instructions for these procedures are given at the end of Phase 1 – Plan the Upgrade in the Reinstall Workbook.

2. Perform the procedures in Phase 2 – Upgrade the Alternate Environment in the Reinstall Workbook. Do not proceed to the next step until you receive the message You may now sign on using your JDE profile to continue.

3. Sign on to the first alternate environment by using the profile that you set up earlier.

4. Perform the procedures in Phase 3 – Update Applications in the Reinstall Workbook.

5. Perform the procedures in Phase 4 – Create Files and Run Jobs in the Reinstall Workbook.
6. Perform the procedures in *Phase 5 – Review Reports* in the *Reinstall Workbook* with the following guidelines.
   - Resolve any file conversion errors before proceeding.
   - You can begin testing this environment while you continue with the following steps to upgrade your second alternate environment.

7. Sign on to the second alternate environment by using the profile that you set up earlier.

8. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook*.

9. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook*.


**Set Up the Upgrade Plans for the Production Environments**

To set up an upgrade plan for each of your production environments, refer to *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook*.

**Upgrade the Production Environments**

After you test the alternate environments, you will use them to upgrade your production environments.

1. Upgrade your first environment according to the procedures in *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook* with the following guidelines.
   - Perform all procedures up to and including the *Create files, run jobs, and review reinstallation reports* checklist item.
   - Do not perform the remaining checklist items in Phase 6 at this time.

2. Sign on to your second production environment by using the profile that you set up earlier.

3. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook*.

4. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook*.

5. Perform the procedures in *Phase 5 – Review Reports* in the *Reinstall Workbook*. 
6. Perform the following procedures in *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook*:

   - Change the J.D. Edwards system values.
   - Change the J.D. Edwards profile.
   - Change the IBM user profile JDE.
   - Rename the J.D. Edwards libraries.
   - Rename the alternate libraries.
   - Start the J.D. Edwards subsystems.

7. You are now ready to operate your production environments at release level A8.1.

**Procedures for Method C**

If you meet the conditions for Method C described earlier, follow these procedures.

**IMPORTANT:** Be sure you have completed *Preliminary Procedures for All Methods* earlier in this chapter before you start this method.

**Set Up the Upgrade Plans for the Alternate Environments**

You must first set up two upgrade plans: one that you will use to upgrade the entire first alternate environment, and another that you will use to convert the data library in the second alternate environment. To set up your plans, refer to *Phase 1 – Plan the Upgrade* in the *Reinstall Workbook*. 
Environment One

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE_C1. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is as it appears in the ZJDE_C1 model.

Your plan name cannot exceed nine (9) characters.

Leave the value in the Install Object/Data Libraries field set to 1. If you want to install source, change the value in the Install Source Library field to 1. Change the library names to match those that are in your first environment. If you currently are at software release level A7.1, A7.2, or A7.3, change the value in the Current JDE Release Level field.

NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.
2. On the Systems to Install/Upgrade screen, the Systems to Upgrade field is set to 1 for each system you have purchased. J.D. Edwards highly recommends that you install or upgrade all systems you have purchased.

**IMPORTANT:** The Systems to Upgrade field is set to 1 for each application system you are licensed to use. Verify that all of the systems you expect to upgrade are selected. For assistance, contact J.D. Edwards Worldwide Customer Support.

NOTE: If you have purchased the InterTrans Logistics SMS/400 product or the Data Systems International WorldRF product, select the systems assigned to the product. The J.D. Edwards reinstallation process restores the libraries for these systems, but it does not perform the product installation. For product installation procedures, refer to the *Strategic Alliance Products Installation Workbook*.

3. Verify the library names on the Merge Information screen. As appropriate, change the library names to correspond to your environments. J.D. Edwards recommends that you do not change the merge modes.

NOTE: Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.

4. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase I – Plan the Upgrade* in the Reinstall Workbook.

Environment Two

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE_C2. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is as it appears in the ZJDE_C2 model.

   Your plan name cannot exceed nine (9) characters.
Convert Multiple Production Environments

Leave the values in the Install Source Library and Install Object/Data Libraries fields set to 0. Change the library names to match those that are in your second environment. If you currently are at software release level A7.1, A7.2, or A7.3, change the value in the Current JDE Release Level field.

NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

2. The systems you select on the Systems to Install/Upgrade screen must be the same as those you selected for your first environment.

3. Verify the merge modes and the library names on the Merge Information screen. ZJDE_C2 is a model plan that assumes the menu files are the only other control files, in addition to the Generic Message/Rates files, existing in your second alternate data library. On the Merge Information screen below, therefore, the Menu and Generic Message/Rates Merges are set to 2 and all other merges are set to 0.

Leave the Generic Message/Rates Merge set to 2. Change the Menu Merge to 0 if your menu files reside in your shared common library.
In addition, leave all other merges set to 0 for control files that exist in your shared common library. These merges will run in the plan for the first environment. Set all other merges to 2 (except the Help Master Merge which should be set to 3) for those control files that are not shared.

NOTE: Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.

4. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the Upgrade* in the Reinstall Workbook.

**Upgrade the Alternate Environments**

After you create your upgrade plans, you are ready to upgrade your alternate environments.

1. Perform these procedures before you begin to upgrade the environments.
   - Be sure no one is signed on to the alternate environments you will be upgrading.
   - Move custom objects.
   - Back up libraries.
   - Perform system-specific procedures for each environment if they apply to you.

Detailed instructions for these procedures are given at the end of *Phase 1 – Plan the Upgrade* in the Reinstall Workbook.

2. Perform the procedures in *Phase 2 – Upgrade the Alternate Environment* in the Reinstall Workbook. Do not proceed to the next step until you receive the message *You may now sign on using your JDE profile to continue.*

3. Sign on to the first alternate environment by using the profile that you set up earlier.


5. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the Reinstall Workbook.

6. Perform the procedures in *Phase 5 – Review Reports* in the Reinstall Workbook with the following guidelines.
   - Resolve any file conversion errors before proceeding.
   - You can begin testing this environment while you continue with the following steps to upgrade your second alternate environment.
7. Sign on to the second alternate environment by using the profile that you set up earlier.

8. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook* with the following guidelines:
   - Print the reports and perform the manual changes for the files associated with the merges you selected for the second alternate environment plan.
   - Print the ASI report and perform the manual changes for the files associated with the merges you selected. In addition, perform the ASIs pertaining to World Writer. It is not necessary to apply ASI changes for files in your shared common library. These ASIs were applied when you upgraded the first alternate environment.

9. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook* with the following guidelines.
   - Run the Rebuild DD/VO only if the Data Dictionary merge ran for the second alternate environment.
   - Run the Build New Files List job.
   - Create the new files in the alternate data library only. Common files were created when you upgraded the first alternate environment.
   - Run the special application jobs.


### Set Up the Upgrade Plans for the Production Environments

To set up an upgrade plan for each of your production environments, refer to *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook*.

### Upgrade the Production Environments

After you test the alternate environments, you will use them to upgrade your production environments.

1. Upgrade your first environment according to the procedures in *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook* with the following guidelines.
   - Perform all procedures up to and including the *Create files, run jobs, and review reinstallation reports* checklist item.
   - Do not perform the remaining checklist items in Phase 6 at this time.

2. Sign on to your second production environment by using the profile that you set up earlier.
3. Perform the procedures in *Phase 3 – Update Applications* in the *Reinstall Workbook* with the following guidelines.

   - If you were able to monitor control file changes for the files residing in your second data library, you can copy the control files from your alternate to your production data library.

   - If you were *not* able to monitor control file changes, proceed as follows:

     Print the reports and perform the manual changes for the files associated with the merges you selected for the second alternate environment plan.

     Print and perform the ASIs for the files associated with the merges you selected. In addition, perform the ASIs pertaining to World Writer. It is not necessary to perform ASIs for files in your shared common library. These ASIs were applied when you upgraded the first alternate environment.

4. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *Reinstall Workbook* with the following guidelines.

   - Run the Rebuild DD/VO only if the Data Dictionary merge ran for the second alternate environment.

   - Run the Build New Files List job.

   - Create the new files in the production data library only. Common files were created when you upgraded the first production environment.

   - Run the Rebuild Menu Word Search job if you did not copy the menu files.

5. Perform the procedures in *Phase 5 – Review Reports* in the *Reinstall Workbook*.

6. Perform the following procedures in *Phase 6 – Upgrade the Production Environment* in the *Reinstall Workbook*.

   - Change the J.D. Edwards system values.

   - Change the J.D. Edwards profile.

   - Change the IBM user profile JDE.

   - Rename the J.D. Edwards libraries.

   - Rename the alternate libraries.

   - Start the J.D. Edwards subsystems.

7. You are now ready to operate your production environments at release level A8.1.
Install PTF to Multiple Environments

This chapter provides you with three methods to install a PTF to more than one production environment. Read the method assumptions in this chapter to determine which method is the most appropriate for your situation. After you determine the method you will use, proceed to Preliminary Procedures for All Methods, and then the procedures for the appropriate method, in this chapter.

Each method requires you to create two upgrade plans you will use to upgrade your production environments. You will create your upgrade plans by copying plans provided by J.D. Edwards and changing the new plans to fit your environments.

NOTE: The library names you use in your environments are probably different than the ones used in this chapter. Examine the assumptions and perform the procedures with your library names in mind.

Method Assumptions

J.D. Edwards recommends you follow one of three methods to install a PTF to your multiple environments. The method you select depends on which approach best describes your situation. Read the method assumptions and select the most appropriate method.

NOTE: The libraries that appear in the illustrations in this section represent the following types of libraries:

- CLTDTA: Your production data library
- CLTCOM: Your common library
- CLTSEC: Your security library
- JDFOBJ: J.D. Edwards object library
- JDFDATA: J.D. Edwards data library
- JDFSRC: J.D. Edwards source library

The library list for your production environment would look similar to those in one of the illustrations, but your list would not include the J.D. Edwards data library (JDFDATA).

All the methods assume that your security files (F0092, F0093, F0094, and F00921) and their logicals are in the security library (library type SEC in your upgrade plans).
Assumptions for Method A

- Multiple environments exist where each environment has its own production data library, but shares the same common, object, security, source (optional), and J.D. Edwards data libraries with the other environment.

- Each production data library contains the Generic Message/Rates files (F0019, F00191, and F00192) and their associated logical files.

- The shared common library contains all of the following files:

  F0004   F0083   F9210   F9816
  F0005   F81901  F9220   F98163
  F0016   F81902  F9601   F98301
  F00161  F9200   F9611   F98302
  F00162  F9202   F9620   F98303
  F00163  F9203   F9621   F9831
  F0082   F9204   F9801   F98311
  F00821  F9207   F9802   F98312

  F126* (if you have system 12)
  F83* (if you have system 83)

  Logical files associated with any of the above files

Assumptions for Method B

- Multiple environments exist where each environment has its own production data library and common library, but shares the same object, security, source (optional), and J.D. Edwards data libraries with the other environment.
Assumptions for Method C

- Multiple environments exist where each environment has its own production data library, but shares the same common, object, security, source (optional), and J.D. Edwards data libraries with the other environment. In this scenario, the production libraries contain one or more of the following files defined as common by J.D. Edwards:

<table>
<thead>
<tr>
<th>File 1</th>
<th>File 2</th>
<th>File 3</th>
<th>File 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>F0004</td>
<td>F0083</td>
<td>F9210</td>
<td>F9816</td>
</tr>
<tr>
<td>F0005</td>
<td>F81901</td>
<td>F9220</td>
<td>F98163</td>
</tr>
<tr>
<td>F0016</td>
<td>F81902</td>
<td>F9601</td>
<td>F98301</td>
</tr>
<tr>
<td>F00161</td>
<td>F9200</td>
<td>F9611</td>
<td>F98302</td>
</tr>
<tr>
<td>F00162</td>
<td>F9202</td>
<td>F9620</td>
<td>F98305</td>
</tr>
<tr>
<td>F00163</td>
<td>F9203</td>
<td>F9621</td>
<td>F9831</td>
</tr>
<tr>
<td>F0082</td>
<td>F9204</td>
<td>F9801</td>
<td>F98311</td>
</tr>
<tr>
<td>F00821</td>
<td>F9207</td>
<td>F9802</td>
<td>F98312</td>
</tr>
</tbody>
</table>

  F126* (if you have system 12)
  F83* (if you have system 83)

Logical files associated with any of the above files

- Each production data library contains the Generic Message/Rates files (F0019, F00191, and F00192) and their associated logical files.

- The shared common library contains the remaining common files.

Preliminary Procedures for All Methods

Perform these procedures before you begin Method A, B, or C.

- Issue the LODRUN command to update the upgrade planner and installation libraries (JDFINS and JDEINSTAL).

- Print the ASI Report.

- Print the special application jobs information.

Detailed instructions for these procedures are given in Phase 1 - Plan the PTF Installation in the PTF Install Workbook.
Install PTF to Multiple Environments

**Procedures for Method A**

If you meet the conditions for Method A described earlier, follow these procedures.

**IMPORTANT:** Be sure you have completed Preliminary Procedures for All Methods earlier in this chapter before you start this method.

**Set Up the Upgrade Plans**

You must first set up two upgrade plans: one that you will use to upgrade the entire first environment, and another that you will use to convert the production data library in the second environment. To set up your plans, refer to Phase 1 – Plan the PTF Installation in the PTF Install Workbook.

**Environment One**

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE_A1. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is based on the ZJDE_A1 model.

   Your plan name cannot exceed nine (9) characters.

   ![Plan the Upgrade Screen 1 of 3](image)

   Leave the value in the Install Object/Data Libraries field set to 1. If you want to install source, change the value in the Install Source Library field to 1. Change the library names to match those that are in your first environment. Change the value in the Current JDE Release Level field to A81, and change the value in the New JDE Release Level field to the name of the PTF you want to install (for example, A81PC00001).
2. On the Systems to Install/Upgrade screen, make sure the Systems to Upgrade field is set to 1 for each system you have a license for. Press Enter twice.

3. Verify the library names on the Merge Information screen. For automatic accounting instructions and next numbers, change the merge modes to 0 because they do not run for PTFs. If you run them, blank reports are printed.

   NOTE: Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.

4. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Phase 1 – Plan the PTF Installation* in the *PTF Install Workbook*.

**Environment Two**

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE_A2. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is based on the ZJDE_A2 model.

```
96003 PLAN THE UPGRADE SCREEN 1 OF 3
LIBRARIES FOR THIS PLAN

PLAN NAME. . . . . . . . ZJDE A2    MULT DATA LIBS SHARE COMMON #2

SPECIFY ALL LIBRARIES FOR THIS PLAN THAT CONTAIN J.D. EDWARDS FILES AND PROGRAMS. EXCLUDE IBM LIBRARIES SUCH AS QGPL AND QTEMP.

CURRENT JDE RELEASE LEVEL . . . . . A81
NEW JDE RELEASE LEVEL . . . . . A81PC000XX

INSTALL SOURCE LIBRARY. . . . . . . 0  (1=YES, 0=NO)
INSTALL OBJECT/DATA LIBRARIES . . 0

LIBRARY   LIBRARY   DESCRIPTION
TYP NAME   LIBRARY   DESCRIPTION
COM ALTCOM   CLIENT'S ALTERNATE COMMON LIB
DTA ALTDTA2   CLIENT'S ALTERNATE DATA LIB #2
SEC ALTSEC   CLIENT'S ALT SECURITY LIBRARY
JDF 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=MORE KEYS
```

Leave the values in the Install Source Library and Install Object/Data Libraries fields set to 0. Change the library names to match those that are in your second environment. Change the value in the Current JDE Release Level field to A81, and change the value in the New JDE Release Level field to the name of the PTF you want to install (for example, A81PC00001).

2. The systems you select on the Systems to Install/Upgrade screen must be the same as those you selected for your first environment.
Install PTF to Multiple Environments

3. Do not change the merge modes on the Merge Information screen. Most merge modes are set to 0 because the merges will run against the common library when you upgrade the first environment. The Generic Message/Rates mode is set to 2 to allow the second set of generic message/rates files in the second data library to be updated. Be sure that the merge modes for automatic accounting instructions and next numbers are set to 0 because they do not run for PTFs.

Verify the library names on the Merge Information screen.

NOTE: Do not change the values in the Run Control File Conversion, Update Data Dictionary Glossary, User Defined Codes Detail Text Update, and Delete Obsolete Menus fields on the Advanced Options screen. Also, do not change the values in the Double Byte Environment and Convert Data to Upper Case fields unless you are a double-byte client. The Run Control File Conversion field is set to 1 to convert any necessary control files that will not convert when the first environment is upgraded. This conversion will affect only those files that were not converted already.

<table>
<thead>
<tr>
<th>96001A</th>
<th>PLAN THE UPGRADE</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADVANCED OPTIONS</td>
<td></td>
</tr>
</tbody>
</table>

PLAN NAME.  . . . .  ZJDE A2  MULT DATA LIBS SHARE COMMON #2

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOLD ON PRINT QUEUE</td>
<td>0</td>
</tr>
<tr>
<td>RUN CONTROL FILE CONVERSION</td>
<td>1</td>
</tr>
<tr>
<td>UPDATE DATA DICTIONARY GLOSSARY</td>
<td>0</td>
</tr>
<tr>
<td>USER DEFINED CODES DETAIL TEXT UPDATE</td>
<td>0</td>
</tr>
<tr>
<td>DELETE OBSOLETE MENUS</td>
<td>0</td>
</tr>
<tr>
<td>DOUBLE BYTE ENVIRONMENT</td>
<td>0</td>
</tr>
<tr>
<td>CONVERT DATA TO UPPER CASE</td>
<td>0</td>
</tr>
</tbody>
</table>

<LIBRARIES JDFINS AND JDEINSTALL WILL BE CONVERTED IMMEDIATELY. COULD TAKE UP TO 20 MINUTES.

F12 OR ENTER=PREVIOUS SCREEN  F24=MORE KEYS

4. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to Phase 1 – Plan the PTF Installation in the PTF Install Workbook.
Upgrade the Production Environments

After you create your upgrade plans, you are ready to upgrade your environments.

1. Perform the procedures in Phase 2A – Install the PTF (One-Step Method) or Phase 2B – Install the PTF (Two-Step Method), whichever is appropriate for your situation, in the PTF Install Workbook. Do not proceed to the next step until you receive the message You may now sign on using your JDE User Profile to continue.

2. Sign on to the first environment.

3. Perform the procedures in Phase 3 – Update Applications in the PTF Install Workbook.

4. Perform the procedures in Phase 4 – Create Files and Run Jobs in the PTF Install Workbook.

5. Perform the procedures in Phase 5 – Review Reports in the PTF Install Workbook. Resolve any file conversion errors before proceeding.

6. Sign on to the second environment.

7. Perform the procedures in Phase 3 – Update Applications in the PTF Install Workbook with the following guidelines.
   - Do not print the Menu Comparison Report and the Data Dictionary Merge Report because the merges associated with these reports did not run for this plan.
   - Apply only the ASIs for automatic accounting instructions (AAIs), next numbers, and World Writer to the data library specified in your second plan.
   - Do not apply menu changes, data dictionary changes, and the remaining ASIs because they were applied when you upgraded the first environment.

8. Perform the procedures in Phase 4 – Create Files and Run Jobs in the PTF Install Workbook with the following guidelines.
   - Do not run the Rebuild DD/VO and Rebuild Menu Word Search jobs. These were done when you upgraded the first environment.
   - Run the Build New Files List job.
   - Create the new files in the data library only. Common files were created when you upgraded the first environment.
   - Run the special application jobs.
Install PTF to Multiple Environments

9. Perform the procedures in Phase 5 - Review Reports in the PTF Install Workbook.

10. You are now ready to operate your production environments at the new PTF level.

Procedures for Method B

If you meet the conditions for Method B described earlier, follow these procedures.

IMPORTANT: Be sure you have completed Preliminary Procedures for All Methods earlier in this chapter before you start this method.

Set Up the Upgrade Plans

You must first set up two upgrade plans: one that you will use to upgrade the entire first environment, and another that you will use to convert the production data and common libraries in the second environment. To set up your plans, refer to Phase 1 - Plan the PTF Installation in the PTF Install Workbook.

Environment One

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE_B1. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is based on the ZJDE_B1 model.

   Your plan name cannot exceed nine (9) characters.

   ![Library Selection Screen](image)

   PLAN NAME: ZJDE_B1
   MULT DATA & COMMON LIBS: 1
   SPECIFY ALL LIBRARIES FOR THIS 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: A81
   NEW JDE RELEASE LEVEL: A81PC000
   INSTALL SOURCE LIBRARY: 0 (1=Yes, 0=No)
   INSTALL OBJECT/DATA LIBRARIES: 1
   LIBRARY DESCRIPTION
   COM ALTCOM: CLIENT’S ALT COMMON LIBRARY #1
   DTA ALTDTA: CLIENT’S ALT DATA LIBRARY #1
   SEC ALTSEC: CLIENT’S ALT SECURITY LIBRARY
   JDE JDFDATA: JDE DATA LIBRARY (ALTERNATE)
   OBJ JDFOBJALT: JDE OBJECT LIBRARY (ALTERNATE)
   SRC JDFSRCALT: JDE SOURCE LIBRARY (ALTERNATE)

   ENTER=UPDATE/NEXT SCREEN  F12=PREVIOUS SCREEN  F24 MORE KEYS
Install PTF to Multiple Environments

Leave the value in the Install Object/Data Libraries field set to 1. If you want to install source, change the value in the Install Source Library field to 1. Change the library names to match those that are in your first environment. Change the value in the Current JDE Release Level field to A81, and change the value in the New JDE Release Level field to the name of the PTF you want to install (for example, A81PC00001).

2. On the Systems to Install/Upgrade screen, make sure the Systems to Upgrade field is set to 1 for each system you have a license for. Press Enter twice.

3. Verify the library names on the Merge Information screen. For automatic accounting instructions and next numbers, change the merge modes to 0 because they do not run for PTFs. If you run them, blank reports are printed.

NOTE: Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.

4. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to Phase 1 – Plan the PTF Installation in the PTF Install Workbook.

Environment Two

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE_B2. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is based on the ZJDE_B2 model.

Your plan name cannot exceed nine (9) characters.

Leave the values in the Install Source Library and Install Object/Data Libraries fields set to 0. Change the library names to match those that are in your second environment. Change the value in the Current JDE Release Level field to A81, and change the value in the New JDE Release Level field to the name of the PTF you want to install (for example, A81PC00001).
2. The systems you select on the Systems to Install/Upgrade screen must be the same as those you selected for your first environment.

3. Verify the library names on the Merge Information screen. For automatic accounting instructions and next numbers, change the merge modes to 0 because they do not run for PTFs. If you run them, blank reports are printed.

   NOTE: Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.

4. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to Phase 1 – Plan the PTF Installation in the PTF Install Workbook.

**Upgrade the Production Environments**

After you create your upgrade plans, you are ready to upgrade your environments.

1. Perform the procedures in Phase 2A – Install the PTF (One-Step Method) or Phase 2B – Install the PTF (Two-Step Method), whichever is appropriate for your situation, in the PTF Install Workbook. Do not proceed to the next step until you receive the message *You may now sign on using your JDE User Profile to continue.*

2. Sign on to the first environment.

3. Perform the procedures in Phase 3 – Update Applications in the PTF Install Workbook.

4. Perform the procedures in Phase 4 – Create Files and Run Jobs in the PTF Install Workbook.

5. Perform the procedures in Phase 5 – Review Reports in the PTF Install Workbook. Resolve any file conversion errors before proceeding.

6. Sign on to the second environment.

7. Perform the procedures in Phase 3 – Update Applications in the PTF Install Workbook.

8. Perform the procedures in Phase 4 – Create Files and Run Jobs in the PTF Install Workbook.


10. You are now ready to operate your production environments at the new PTF level.
Procedures for Method C

If you meet the conditions for Method C described earlier, follow these procedures.

IMPORTANT: Be sure you have completed Preliminary Procedures for All Methods earlier in this chapter before you start this method.

Set Up the Upgrade Plans

You must first set up two upgrade plans: one that you will use to upgrade the entire first environment, and another that you will use to convert the production data library in the second environment. To set up your plans, refer to Phase 1 - Plan the PTF Installation in the PTF Installation Workbook.

Environment One

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE_C1. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is based on the ZJDE_C1 model.

   Your plan name cannot exceed nine (9) characters.

   Leave the value in the Install Object/Data Libraries field set to 1. If you want to install source, change the value in the Install Source Library field to 1. Change the library names to match those that are in your first environment. Change the value in the Current JDE Release Level field to A81, and change the value in the New JDE Release Level field to the name of the PTF you want to install (for example, A81FC00001).
2. On the Systems to Install/Upgrade screen, make sure the Systems to Upgrade field is set to 1 for each system you have a license for. Press Enter twice.

3. Verify the library names on the Merge Information screen. For automatic accounting instructions and next numbers, change the merge modes to 0 because they do not run for PTFs. If you run them, blank reports are printed.

NOTE: Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.

4. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to *Base I ~ Plan the PTF Installation* in the *PTF Install Workbook.*

**Environment Two**

You must create an upgrade plan that is based on the plan provided by J.D. Edwards named ZJDE_C2. Use the following guidelines to set up your plan.

1. Your Libraries for This Plan screen should look similar to the one below, which is based on the ZJDE_C2 model.

Your plan name cannot exceed nine (9) characters.

```
96003 PLAN THE UPGRADE SCREEN 1 OF 3 LIBRARIES FOR THIS PLAN

PLAN NAME. . . . . . ZJDE_C2 DATA LIBS HAVE COMMON FILES #2

SPECIFY ALL LIBRARIES FOR THIS 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 . . . A81
NEW JDE RELEASE LEVEL . . . . . . A81PC00001

INSTALL SOURCE LIBRARY. . . . . . 0  (1=YES, 0=NO)
INSTALL OBJECT/DATA LIBRARIES . . 0

LIB  LIBRARY  LIBRARY
TYP  NAME  DESCRIPTION
COM  ALTCOM  CLIENT’S ALT COMMON LIBRARY
DTA  ALTDATA2  CLIENT’S ALT DATA LIBRARY #2
SEC  ALTSEC  CLIENT’S ALT SECURITY LIBRARY
JDE  JDEDATAAALT  JDE DATA LIBRARY (ALTERNATE)
OBJ  JDEOBJAALT  JDE OBJECT LIBRARY (ALTERNATE)
SRC  JDESRCAALT  JDE SOURCE LIBRARY (ALTERNATE)

ENTER=UPDATE/NEXT SCREEN  F12=PREVIOUS SCREEN  F24=MORE KEYS
```

Leave the values in the Install Source Library and Install Object/Data Libraries fields set to 0. Change the library names to match those that are in your second environment. Change the value in the Current JDE Release Level field to A81, and change the value in the New JDE Release Level field to the name of the PTF you want to install (for example, A81PC00001).

2. The systems you select on the Systems to Install/Upgrade screen must be the same as those you selected for your first environment.
3. Verify the merge modes and the library names on the Merge Information screen. ZJDE_C2 is a model plan that assumes the menu files are the only other control files, in addition to the Generic Message/Rates files, existing in your second alternate data library. On the Merge Information screen below, therefore, the Menu and Generic Message/Rates Merges are set to 2 and all other merges are set to 0.

![Merge Information Screen](image)

Leave the Generic Message/Rates Merge set to 2. Change the Menu Merge to 0 if your menu files reside in your shared common library.

In addition, leave all other merges set to 0 for control files that exist in your shared common library. These merges will run in the plan for the first environment. Set all other merges to 2 (except the Help Master Merge which should be set to 3) for those control files that are not shared.

Because the Automatic Accounting Instructions and Next Numbers Merges do not run for PTFs, make sure both merges are set to 0.

NOTE: Leave the value in the Run Control File Conversion field on the Advanced Options screen set to 1. J.D. Edwards also recommends that you do not change the other field values on this screen.

4. Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. For information about how to run the report and other validation issues, refer to Phase 1 – Plan the PTF Installation in the PTF Install Workbook.

**Upgrade the Production Environments**

After you create your upgrade plans, you are ready to upgrade your environments.

1. Perform the procedures in Phase 2A – Install the PTF (One-Step Method) or Phase 2B – Install the PTF (Two-Step Method), whichever is appropriate for your situation, in the PTF Install Workbook. Do not proceed to the next step until you receive the message You may now sign on using your JDE User Profile to continue.

2. Sign on to the first environment.

3. Perform the procedures in Phase 3 – Update Applications in the PTF Install Workbook.
4. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *PTF Install Workbook*.

5. Perform the procedures in *Phase 5 – Review Reports* in the *PTF Install Workbook*. Resolve any file conversion errors before proceeding.

6. Sign on to the second environment.

7. Perform the procedures in *Phase 3 – Update Applications* in the *PTF Install Workbook* with the following guidelines.

   - Print the reports and perform the manual changes for the files associated with the merges you selected for the second alternate environment plan.

   - Print the ASI report and perform the manual changes for the files associated with the merges you selected. In addition, perform the ASIs pertaining to Automatic Accounting Instructions, Next Numbers, and World Writer. It is not necessary to apply ASI changes for files in your shared common library. These ASIs were applied when you upgraded the first alternate environment.

8. Perform the procedures in *Phase 4 – Create Files and Run Jobs* in the *PTF Install Workbook* with the following guidelines.

   - Run the Rebuild DD/VO job only if the Data Dictionary merge ran for the second alternate environment.

   - Run the Build New Files List job.

   - Create the new files in the data library only. Common files were created when you upgraded the first environment.

   - Run the special application jobs.

9. Perform the procedures in *Phase 5 – Review Reports* in the *PTF Install Workbook*.

10. You are now ready to operate your production environments at the new PTF level.
Multiple Environment Lists (J 98INITA)

This chapter describes how you can create a multiple environment list for each user and control the printing of reports produced during the upgrade process.

The multiple environment program (J98INITA) lets you create:

- A library list once and attach multiple users to it
- A “multiple” environment that lets a user select an environment from a list of environments

This program also lets you transfer easily among software environments. For example, you can:

- Create a custom library list menu for the multiple environments
- Access a J.D. Edwards software environment by selecting it from the custom library list menu
- Exit from the J.D. Edwards software environment to the custom library list menu without redefining the environment

An example of a library list menu appears below.
The following sections explain the procedures for creating the multiple environment list.

**Authorize Users to Run the J98INITA Program**

The multiple environment program (J98INITA) duplicates and changes the job description for a user profile from QGPL to QTEMP by using the CRTEUPOBJ and CHGJJOBD commands. To run J98INITA successfully, you must first authorize all user profiles to use these commands.

To assign *USE authority to the CRTEUPOBJ command:

1. Type EDTOBJAUT on a command entry line and press F4 (Prompt). The Edit Object Authority (EDTOBJAUT) screen appears.

2. Type CRTEUPOBJ in the Object field, *LIBL in the Library field, and *CMD in the Object Type field. Press Enter. The Edit Object Authority screen appears.

3. Assign *USE authority to the appropriate users or to *PUBLIC. Use F6 to add new users.

To assign *USE authority to the CHGJJOBD command:

1. Type EDTOBJAUT on a command entry line and press F4 (Prompt). The Edit Object Authority (EDTOBJAUT) screen appears.

2. Type CHGJJOBD in the Object field, *LIBL in the Library field, and *CMD in the Object Type field. Press Enter. The Edit Object Authority screen appears.

3. Assign *USE authority to the appropriate users or to *PUBLIC. Use F6 to add new users.
Create Files Required by the J98INITA Program

To successfully run the J98INITA program, you must create the User Library List Master file (F0093), the Library List Master file (F0094), and their associated logicals.

1. Be sure you are signed on as JDE.

2. Select Data Files from the Data Base Management menu (G9645).

3. Type 00 in the Enter System Code field, the name of the library that contains the F0092 file in the Create In Library field, and JDFDATA (or the J.D. Edwards library that contains the F0093 and F0094 files) in the Source/From Libr field. Press Enter.

4. Type 2 (Create duplicate without data) in the Sel (Selection) field next to each of the following files:

<table>
<thead>
<tr>
<th>File Name</th>
<th>File Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>F0093</td>
<td>Library List Control</td>
</tr>
<tr>
<td>F0094</td>
<td>Library List Master File</td>
</tr>
<tr>
<td>F0093LA</td>
<td>User and Sequence Number</td>
</tr>
<tr>
<td>F0093LB</td>
<td>Library Name and User</td>
</tr>
<tr>
<td>F0094LA</td>
<td>Multi-Format by Library</td>
</tr>
</tbody>
</table>

5. Press Enter. The system creates the selected files in the specified library.

Specify J98INITA as the Initial Program

To automatically run the J98INITA program when the user signs on, you must specify J98INITA as the initial program to run. Repeat the following steps for each user profile you want set up in this way.

1. Type CHGUSRPRF on a command entry line and press F4 (Prompt). The Change User Profile (CHGUSRPRF) screen appears.

2. Type the user profile name in the User Profile field and press F10 (Additional Parameters).

3. Type J98INITA in the Initial Program to Call field. Press Enter.

NOTE: If you will be accessing library lists that include a variety of earlier releases (including A7.3 or earlier), J98INITA must be called from the object library of the most recent release level.
Set Up User Information

You must be sure user information exists for each user profile. Select User Information Revisions from the Library List Control menu (G94) and inquire on each user ID. If information for a user profile does not exist, type A in the Action Code field and the user name in the User ID field. Fill out the screen with the appropriate information and press Enter. An example appears below.

NOTE: If you have already entered user information by using the Security Officer menu (G94), you do not need to enter the information again. The list of libraries associated with the user profile (discussed in sections that follow) will override any library list currently associated with the user.

<table>
<thead>
<tr>
<th>0092N</th>
<th>User Information Revisions</th>
<th>Action Code.</th>
<th>I</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID.</td>
<td>USERNAME</td>
<td>User Security: A J K DP F</td>
<td></td>
</tr>
<tr>
<td>Menu Mask.</td>
<td>Initial Menu to Execute.</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Initial Program.</td>
<td>Menu Travel.</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Command Entry.</td>
<td>Allow Fast Path (Y/N).</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Menu Level.</td>
<td>User Type.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User Class/Group</td>
<td>Batch Job Queue.</td>
<td>Q.BATCH</td>
<td></td>
</tr>
<tr>
<td>Job Scheduling Priority.</td>
<td>Output Priority.</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Logging(level/severity/messages)</td>
<td>Output Queue .</td>
<td>MARSHALL</td>
<td></td>
</tr>
<tr>
<td>Optional Printer File Library.</td>
<td>Current Library.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address Number .</td>
<td>Set Attention Program.</td>
<td>QCMD</td>
<td></td>
</tr>
<tr>
<td>F6=Display/Lang Pref</td>
<td>F9=Library Inquiry</td>
<td>F21=Print Lib List</td>
<td></td>
</tr>
<tr>
<td>F24=More</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Set Up Library Lists

When a user signs on, a list of environments appears on their screen if the initial program assigned to that user is J98INITA (multiple environment program) and more than one library list from which to select exists. Each environment must be defined by a list of libraries that are accessed when the user selects the environment. You must set up a library list for each environment you want to appear on a multiple environment list.

Select Library List Revisions from the Library List Control menu (G944). Then from the Library List Revisions screen, specify the following information.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Code</td>
<td>Specify A to add a new environment.</td>
</tr>
<tr>
<td>Library List Name</td>
<td>Specify a unique name for the new environment (up to nine characters).</td>
</tr>
<tr>
<td>Description</td>
<td>Specify a description (up to 30 characters) for the environment.</td>
</tr>
<tr>
<td>Menu Program ID</td>
<td>Type P00MENU, which is the name of the menu driver required to run J98INITA.</td>
</tr>
<tr>
<td>Library List</td>
<td>Specify the names of libraries to be included in the environment. You must list the libraries in the order you want them accessed when the user selects the environment. Use blanks to separate the library names. The total number of libraries, including both the system library list and the job library list, cannot exceed 25. IMPORTANT: Your list must include the QTEMP (IBM Temporary Data Files) and QGPL (IBM General Purpose Library) libraries. QTEMP must be listed before QGPL.</td>
</tr>
</tbody>
</table>

An example of a library list assigned to an environment follows:

```
0094 Library List Revisions
Action Code. . . . . I
Library List Name. . JDESOFT
Description. . . . . A8.1
Menu Program ID. . P00MENU
Library List . . . . QTEMP JDFOBJ COMMON xxxDATA JDFSRC QGPL
```
Assign Library Lists to Each User

After you verify your information, press Enter. The environment with its associated library list is added.

Assign Library Lists to Each User

After you specify user information for all your user profiles and define the environments with library lists, you can assign specific environments to each user.

Select User Signon List Revisions from the Library List Control menu (G944). Then from the User Signon List Revisions screen, indicate the following information.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Code</td>
<td>Specify A to add.</td>
</tr>
<tr>
<td>User ID</td>
<td>Specify the name of the user profile.</td>
</tr>
<tr>
<td>Seq Number</td>
<td>Specify a number that indicates where in the multiple environment list you want the environment selection to be positioned. Based on this number, the environments will be ordered lowest to highest.</td>
</tr>
<tr>
<td>Library List</td>
<td>Specify the name of an existing environment (up to nine characters).</td>
</tr>
</tbody>
</table>
Multiple Environment Lists (J98INITA)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign-on Menu</td>
<td>Specify the name of the menu (for instance, G or G92) you want to appear when the user signs on. This specification overrides the Initial Menu to Execute value that appears on the User Information screen.</td>
</tr>
<tr>
<td>Description</td>
<td>The description associated with the specified environment. This field does not require your input (appears after you press Enter and re-inquire on the user ID).</td>
</tr>
</tbody>
</table>

Your screen should look similar to the one below.

0093  User Signon List Revisions

Action Code... A
User ID... USERNAME

<table>
<thead>
<tr>
<th>Seq</th>
<th>Library</th>
<th>Sign-on</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>.10</td>
<td>TESTA8</td>
<td>G92</td>
<td>A8.1 Development</td>
</tr>
<tr>
<td>.20</td>
<td>DEMOA8</td>
<td>G</td>
<td>A8.1 Demonstration</td>
</tr>
<tr>
<td>1.00</td>
<td>XDEMOA8PUR</td>
<td>G</td>
<td>Publications Master Data -A8.1</td>
</tr>
<tr>
<td>2.00</td>
<td>TESTDEVAS</td>
<td>G</td>
<td>A8.1 JDE Training Environment</td>
</tr>
<tr>
<td>3.00</td>
<td>PRODA8</td>
<td>G</td>
<td>A8.1 Production</td>
</tr>
</tbody>
</table>

After you verify the information, press Enter. When the user in this example signs on, the Library List Selection screen that was illustrated earlier in this chapter (page 11-1) appears.
**Miscellaneous**

This chapter explains how to change the print file attributes for all J.D. Edwards reports. It also includes how to use the optional tools that appear on the Post Upgrade Menu (G97R4) and the PTF Post Upgrade Menu (G97PTF), and how to install source only.

**Printer Issues**

The print file settings in your upgrade plan control how reports are printed during the installation or reinstallation process only. To change the print file attributes for all J.D. Edwards reports, perform the following procedures.

NOTE: These procedures apply to both reinstallations and PTFs.

**Change Existing DREAM Writer Printer Overrides**

This procedure updates all existing DREAM Writer printer overrides with the values you specify.

1. Select Global Versions Pmt Override from the DREAM Writer menu (G81).
2. After you read the message screen that appears, press F6 (Execute).
3. Type P in the Form ID: From field.
4. Leave the Form ID: Thru field blank.
5. Type the new values in the appropriate fields. If you want a field to remain unchanged, leave it blank. If you want the default value to be used for a field, type an asterisk (*).
6. After you verify your information, press Enter.

**Change Standard Print Files**

This procedure updates all standard print files with the values you specify.

1. Type CHGPRTF at the command entry line, then press F4 (Prompt).
2. Type R in the File field, then press F10 (Additional Parameters).
3. Type the new values in the appropriate fields.
4. After you verify your information, press Enter.
After you complete the upgrade process and you perform the ASIs, you can create the Menu Integrity Report (R900090) for reinstallations only. This report lists possible problems with your menus, such as menu selections that call obsolete programs.

**Menu Integrity Report**

By running this report, you can identify possible problems not encountered during the upgrade process that could cause your J.D. Edwards software to not run properly. It shows menu names and selections along with selection information and exception descriptions. The exception descriptions indicate possible problems that may occur when you select an item from a menu.

**Run the Report**

To run the Menu Integrity Report:

1. Be sure you are signed on as a user who accesses a production library.

2. From the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF), select Utilities. From the Upgrade Utilities menu, select Run Menu Integrity Report. A versions list appears.

3. Type 1 (Run) in the O (Option) field next to version XJDE0001 (Menu Integrity Report – All Menus). The report submits to batch. An example of the report follows:

<table>
<thead>
<tr>
<th>Menu Name</th>
<th>Inst</th>
<th>L</th>
<th>Menu Job</th>
<th>Menu Selection Description</th>
<th>Form ID</th>
<th>Version</th>
<th>Run Time</th>
<th>Exception Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>G</td>
<td>00</td>
<td>10</td>
<td>*A08</td>
<td>Human Resources</td>
<td></td>
<td></td>
<td></td>
<td>Menu Message Invalid sys code</td>
</tr>
<tr>
<td>G</td>
<td>00</td>
<td>10</td>
<td>*A08</td>
<td>Human Resources</td>
<td></td>
<td></td>
<td></td>
<td>Menu Message Invalid sys code</td>
</tr>
<tr>
<td>G07A2246</td>
<td>07</td>
<td>14</td>
<td>J0627</td>
<td>WC Summary -- (F0627)</td>
<td>P0627</td>
<td>0JDE0001</td>
<td></td>
<td>Program Not in *LIBL</td>
</tr>
<tr>
<td>G07A302</td>
<td>07</td>
<td>19</td>
<td>J82001</td>
<td>Table Method Explanations</td>
<td>Q07</td>
<td>0JDE0001</td>
<td></td>
<td>Invalid Form ID</td>
</tr>
<tr>
<td>G07A302</td>
<td>07</td>
<td>19</td>
<td>J82001</td>
<td>Table Method Explanations</td>
<td>Q07</td>
<td>0JDE0001</td>
<td></td>
<td>Invalid DREAM Writer version</td>
</tr>
<tr>
<td>G07E11</td>
<td>07</td>
<td>04</td>
<td>J066304</td>
<td>Establish Summary Report</td>
<td>P066304</td>
<td></td>
<td></td>
<td>Invalid Form ID</td>
</tr>
<tr>
<td>G07E11</td>
<td>07</td>
<td>04</td>
<td>J066304</td>
<td>Establish Summary Report</td>
<td>P066304</td>
<td></td>
<td></td>
<td>Program Not in *LIBL</td>
</tr>
<tr>
<td>G07G4</td>
<td>07</td>
<td>06</td>
<td>J09610</td>
<td>Extract Account Master for DL</td>
<td>P09610</td>
<td></td>
<td></td>
<td>Program Obsolete - Check SVR</td>
</tr>
<tr>
<td>G07G4</td>
<td>07</td>
<td>06</td>
<td>J09610</td>
<td>Extract Account Master for DL</td>
<td>P09610</td>
<td></td>
<td></td>
<td>Invalid Form ID</td>
</tr>
<tr>
<td>G07G4</td>
<td>07</td>
<td>06</td>
<td>J09610</td>
<td>Extract Account Master for DL</td>
<td>P09610</td>
<td></td>
<td></td>
<td>Program Not in *LIBL</td>
</tr>
<tr>
<td>G07R3</td>
<td>07</td>
<td>08</td>
<td>J06282</td>
<td>Rate Extension</td>
<td>P06282</td>
<td>0JDE0001</td>
<td></td>
<td>Invalid DREAM Writer version</td>
</tr>
<tr>
<td>G07A322</td>
<td>07</td>
<td>15</td>
<td>J07145</td>
<td>Calendar Month DA’s (F06145)</td>
<td>P07145</td>
<td></td>
<td></td>
<td>Program Not in *LIBL</td>
</tr>
<tr>
<td>G07A322</td>
<td>07</td>
<td>18</td>
<td>J071461</td>
<td>Payroll Mo. Paytypes (F06146)</td>
<td>P071461</td>
<td></td>
<td></td>
<td>Program Not in *LIBL</td>
</tr>
<tr>
<td>G31A11</td>
<td>31</td>
<td>20</td>
<td>J82001</td>
<td>Completed Order Valuation</td>
<td>Q31</td>
<td>0JDE0010</td>
<td></td>
<td>Invalid Form ID</td>
</tr>
<tr>
<td>G31A11</td>
<td>31</td>
<td>20</td>
<td>J82001</td>
<td>Completed Order Valuation</td>
<td>Q31</td>
<td>0JDE0010</td>
<td></td>
<td>Invalid DREAM Writer version</td>
</tr>
<tr>
<td>G31A11</td>
<td>31</td>
<td>21</td>
<td>J82001</td>
<td>Completed Order Variance</td>
<td>Q31</td>
<td>0JDE0011</td>
<td></td>
<td>Invalid Form ID</td>
</tr>
<tr>
<td>G31A11</td>
<td>31</td>
<td>21</td>
<td>J82001</td>
<td>Completed Order Variance</td>
<td>Q31</td>
<td>0JDE0011</td>
<td></td>
<td>Invalid DREAM Writer version</td>
</tr>
<tr>
<td>G31A11</td>
<td>31</td>
<td>22</td>
<td>J82001</td>
<td>Material Usage Variance</td>
<td>Q31</td>
<td>0JDE0006</td>
<td></td>
<td>Invalid Form ID</td>
</tr>
<tr>
<td>G31A11</td>
<td>31</td>
<td>22</td>
<td>J82001</td>
<td>Material Usage Variance</td>
<td>Q31</td>
<td>0JDE0006</td>
<td></td>
<td>Invalid DREAM Writer version</td>
</tr>
<tr>
<td>G31A11</td>
<td>31</td>
<td>23</td>
<td>J82001</td>
<td>Labor Efficiency Variances</td>
<td>Q31</td>
<td>0JDE0007</td>
<td></td>
<td>Invalid Form ID</td>
</tr>
<tr>
<td>G31A11</td>
<td>31</td>
<td>23</td>
<td>J82001</td>
<td>Labor Efficiency Variances</td>
<td>Q31</td>
<td>0JDE0007</td>
<td></td>
<td>Invalid DREAM Writer version</td>
</tr>
<tr>
<td>G31B</td>
<td>31</td>
<td>02</td>
<td>J3104</td>
<td>Schedule Revisions</td>
<td>P3104</td>
<td>0JDE0001</td>
<td></td>
<td>Menu Message not found</td>
</tr>
<tr>
<td>G31B</td>
<td>31</td>
<td>03</td>
<td>J3114</td>
<td>Schedule Workbench</td>
<td>P3114</td>
<td>0JDE0001</td>
<td></td>
<td>Menu Message not found</td>
</tr>
<tr>
<td>G31B</td>
<td>31</td>
<td>04</td>
<td>J31224</td>
<td>Scheduling Review</td>
<td>P31224</td>
<td>0JDE0001</td>
<td></td>
<td>Menu Message not found</td>
</tr>
<tr>
<td>G31B</td>
<td>31</td>
<td>05</td>
<td>J31223</td>
<td>Production History</td>
<td>P31223</td>
<td>0JDE0001</td>
<td></td>
<td>Menu Message not found</td>
</tr>
<tr>
<td>G31C</td>
<td>31</td>
<td>23</td>
<td>J82001</td>
<td>Work Estimate Summary Report</td>
<td>Q30</td>
<td>ETO 1</td>
<td></td>
<td>Invalid Form ID</td>
</tr>
<tr>
<td>G31C</td>
<td>31</td>
<td>23</td>
<td>J82001</td>
<td>Work Estimate Summary Report</td>
<td>Q30</td>
<td>ETO 1</td>
<td></td>
<td>Invalid DREAM Writer version</td>
</tr>
</tbody>
</table>

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Menu Integrity Report Date - . . . 02.05.97

Upgrade 12-2 A8.1 Reference 12/99
Run Single File Conversions

If file conversions fail during UPG_STEP2 or ALT_STEP2 (in the reinstallation process), or PTF_STEP2 (in the PTF installation process), you can run file conversions individually. From the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF), select Utilities. From the Upgrade Utilities menu, select Run Single File Conversions. Before you use this function, contact J.D. Edwards Worldwide Customer Support for assistance.

Work with Technical Upgrade Notes

The technical upgrade notes provide you with useful information about the changes that have occurred in the new release or PTF level, including:

- Details about conversion programs that appear in the File Conversion Scheduler file (F97201)
- Changes in file lengths
- Members included in a specific PTF (PTFs only)
- New and obsolete jobs performed from menu selections
- Instruction for special application jobs
- New and obsolete programs
- Changes in the quantity or sequence of processing options in DREAM Writer versions

NOTE: A change in sequence can mean one of the following:
- The processing options for a version appear in a different order, or
- One or more of the processing options has been removed, and then others have been added, but the total number of processing options remains the same as before the change.

- SAR detail

You can view the notes on your screen or print them.
To access the Display Tech Upgrade Notes screen, select Work With Tech Upgrade Notes from the Software Upgrade Menu (A97IBM).

<table>
<thead>
<tr>
<th>O Sys</th>
<th>P Code</th>
<th>From Release</th>
<th>To Release</th>
<th>Tw</th>
<th>ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>00</td>
<td>A62</td>
<td>A81</td>
<td>FC 00</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
<tr>
<td>04</td>
<td>A62</td>
<td>A81</td>
<td>FC 04</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
<tr>
<td>07</td>
<td>A62</td>
<td>A81</td>
<td>FC 07</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
<tr>
<td>09</td>
<td>A62</td>
<td>A81</td>
<td>FC 09</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>A62</td>
<td>A81</td>
<td>FC 11</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>A62</td>
<td>A81</td>
<td>FC 12</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>A62</td>
<td>A81</td>
<td>FC 13</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>A62</td>
<td>A81</td>
<td>FC 15</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>A62</td>
<td>A81</td>
<td>FC 32</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>A62</td>
<td>A81</td>
<td>FC 40</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
<tr>
<td>47</td>
<td>A62</td>
<td>A81</td>
<td>FC 47</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
<tr>
<td>52</td>
<td>A62</td>
<td>A81</td>
<td>FC 52</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
<tr>
<td>77</td>
<td>A62</td>
<td>A81</td>
<td>FC 77</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
<tr>
<td>81</td>
<td>A62</td>
<td>A81</td>
<td>FC 81</td>
<td>File Chg</td>
<td>FILE CHANGE</td>
<td></td>
</tr>
</tbody>
</table>

4=Select 8=Print  F2=Alternate Inquiry  F14=Print Summary  F21=Print Detail

To display an alternate screen from which you can inquire on a specific program (in the Member ID field) and view all of the associated SARs, press F2 (Alternate Inquiry).

The following table explains the fields on the Display Tech Upgrade Notes screen.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notes Types</td>
<td>The types of technical upgrade notes you want to list (up to four). Valid types include:</td>
</tr>
<tr>
<td>FC</td>
<td>File Changes. Indicates changes in file lengths.</td>
</tr>
<tr>
<td>FS</td>
<td>File Scheduler Records. Provides details about conversion programs that appear in the File Conversion Scheduler file (F97201).</td>
</tr>
<tr>
<td>MI</td>
<td>Members Included in PTF. Indicates all members included in a specific PTF.</td>
</tr>
<tr>
<td>MJ</td>
<td>Menu Jobs to Execute. Indicates new and obsolete jobs performed from menu selections.</td>
</tr>
<tr>
<td>MM</td>
<td>Menu Messages. Provides instructions for special application jobs.</td>
</tr>
<tr>
<td>PC</td>
<td>Program Changes. Indicates new and obsolete programs.</td>
</tr>
<tr>
<td>PO</td>
<td>Processing Options. Indicates changes in the quantity or sequence of processing options in DREAM Writer versions.</td>
</tr>
<tr>
<td>SR</td>
<td>SAR Detail. Provides descriptions of SARs.</td>
</tr>
</tbody>
</table>

To list all notes, leave these fields blank.
<table>
<thead>
<tr>
<th>FIELD</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Systems</td>
<td>The codes for the application systems for which you want to list notes (up to five). If you want to list notes related to all the applications you have on your machine, leave these fields blank.</td>
</tr>
<tr>
<td>Member ID (alternate inquiry screen only)</td>
<td>The program number (for instance, P0010) for which you want to list notes.</td>
</tr>
<tr>
<td>From Release (top part of screen)</td>
<td>The current release level of your J.D. Edwards software (for example, A62). If you specify release levels in both this field and the To Release field, the screen lists notes for all release level combinations including the ones you specified and those in between. For example, if you specify you are upgrading from A6.2 to A8.1, your screen could list notes associated with the following releases:</td>
</tr>
<tr>
<td></td>
<td><strong>From Release</strong></td>
</tr>
<tr>
<td></td>
<td>A62</td>
</tr>
<tr>
<td></td>
<td>A62</td>
</tr>
<tr>
<td></td>
<td>A71</td>
</tr>
<tr>
<td></td>
<td>A72</td>
</tr>
<tr>
<td></td>
<td>A72</td>
</tr>
<tr>
<td></td>
<td>A73</td>
</tr>
<tr>
<td></td>
<td>A73</td>
</tr>
<tr>
<td></td>
<td>A81</td>
</tr>
</tbody>
</table>

NOTE: For note type MM (menu messages) only, if you specify values in both the From Release and To Release fields, the screen lists only notes that match these release levels.
### Miscellaneous

<table>
<thead>
<tr>
<th>FIELD</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Release (top part of</td>
<td>The release or PTF level to which you want to upgrade your software (for example, A81 or A81PC00001).</td>
</tr>
<tr>
<td>screen)</td>
<td>If you specify a PTF level in this field, but leave the From Release field blank, the screen lists notes that apply to the PTF only. For example, if you specify you are upgrading to PTF A81PC00001, your screen could list notes associated with the PTF:</td>
</tr>
<tr>
<td>From Release</td>
<td>To Release</td>
</tr>
<tr>
<td>A81PC00001</td>
<td>NOTE: For note type MI (members included) only, the screen lists only notes that are specific to the PTF.</td>
</tr>
<tr>
<td>A62</td>
<td>If you specify release levels in both this field and the From Release field, the screen lists notes for all release level combinations including the ones you specified and those in between. For example, if you specify you are upgrading from A6.2 to A8.1, your screen could list notes associated with the following releases:</td>
</tr>
<tr>
<td>A62PC00001</td>
<td>From Release</td>
</tr>
<tr>
<td>A62</td>
<td>A62</td>
</tr>
<tr>
<td>A62</td>
<td>A62PC00001</td>
</tr>
<tr>
<td>A71</td>
<td>A71</td>
</tr>
<tr>
<td>A71</td>
<td>A71PC00001</td>
</tr>
<tr>
<td>A72</td>
<td>A72</td>
</tr>
<tr>
<td>A72</td>
<td>A72PC00001</td>
</tr>
<tr>
<td>A73</td>
<td>A73</td>
</tr>
<tr>
<td>A73</td>
<td>A73PC00001</td>
</tr>
<tr>
<td>A81</td>
<td>A81</td>
</tr>
<tr>
<td>A81PC00001</td>
<td>NOTE: For note type MM (menu messages) only, if you specify values in both the From Release and To Release fields, the screen lists only notes that match these release levels.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OP (Option)</th>
<th>If you specify a 4 in this field, the information for the selected note is displayed. If you specify an 8, the information for the selected note is printed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sys Code</td>
<td>The code that identifies the application system to which the note is assigned.</td>
</tr>
<tr>
<td>From Release</td>
<td>The release level of J.D. Edwards software this note assumes you are at currently.</td>
</tr>
<tr>
<td>To Release</td>
<td>The release or PTF level this note assumes you are upgrading to.</td>
</tr>
<tr>
<td>Ty (Type)</td>
<td>The note type (for example, FC for file changes).</td>
</tr>
<tr>
<td>FIELD</td>
<td>EXPLANATION</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>ID</td>
<td>The identifying name of the particular note. The following note IDs are examples of each note type.</td>
</tr>
<tr>
<td>00 File Chg</td>
<td>File Changes (FC). Contains file change information for system 00.</td>
</tr>
<tr>
<td>J000671</td>
<td>File Scheduler Records (FS). Contains details about the J000671 program that converts file F0006.</td>
</tr>
<tr>
<td>00 Mbrs Inc</td>
<td>Members Included in PTF (MI). Contains all members included in a specific PTF for system 00.</td>
</tr>
<tr>
<td>00 Menu Job</td>
<td>Menu Jobs to Execute (MJ). Contains a list of new and obsolete jobs for system 00 that are performed from menu selections.</td>
</tr>
<tr>
<td>G97U1 02</td>
<td>Menu Messages (MM). Contains instructions for the special application job that appears as selection 2 on the G97U1 menu.</td>
</tr>
<tr>
<td>00 Pgm Chg</td>
<td>Program Changes (PC). Contains a list of new and obsolete programs for system 00.</td>
</tr>
<tr>
<td>00 Proc Opt</td>
<td>Processing Options (PO). Contains a list of DREAM Writer IDs for system 00 for which the processing options have changed in quantity or sequence.</td>
</tr>
<tr>
<td>00345957</td>
<td>SAR Detail (SR). Contains the description of SAR 00345957.</td>
</tr>
</tbody>
</table>

**Description**
The note description.

To print the notes in summary, press F21 (Print Summary) with the following guidelines.

- If you specified system codes in the Systems fields on the Display Tech Upgrade Notes screen, F21 prints the notes associated with those systems regardless of whether you have them installed on your system.

- If you specified SR in one of the Notes Types fields, F21 prompts you to indicate whether you want to include members that are affected for SARs in the report. If you enter Y (Yes), the members that are affected by a particular SAR appear with the SAR number on the report.

To print the notes in detail, press F14 (Print Detail).

**IMPORTANT:** J.D. Edwards recommends that you specify the systems and the note types for which you want notes printed. If you leave the Systems and Notes Types fields blank, your print output could be very large.
Start or End the J.D. Edwards Monitor (JDEMONITOR)

If you need to end the J.D. Edwards Monitor to do backups or an IPL, you can type ENDJDEMON from the Software Upgrade Menu (A97IBM), which can be accessed only by signing on as JDEINSTAL. You can also do this by selecting Utilities from the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF), and then selecting End JDE Monitor from the Upgrade Utilities menu.

If you have not completed Phase 5 of the Reinstall Workbook or the PTF Install Workbook, you must start the J.D. Edwards Monitor again. To start the J.D. Edwards Monitor, either type STRJDEMON from the Software Upgrade Menu (A97IBM), which can be accessed only by signing on as JDEINSTAL. You can also do this by selecting Utilities from the Post Upgrade Menu (G97R4) or the PTF Post Upgrade Menu (G97PTF), and then selecting Start JDE Monitor from the Upgrade Utilities menu.

Install Source Only

NOTE: Before you perform this procedure, you must perform the LODRUN procedure from the medium labeled LODRUN that you received with your shipment.

To install source only:

1. Sign on as JDEINSTAL. The Software Upgrade Menu (A97IBM) appears.
2. Select Work With Upgrade Planner. The Plan the Upgrade screen appears.
3. In the Action Code field, type I (Inquire).
4. In the Plan Name field, type the name of the upgrade plan you used to install or upgrade the environment in which you now want to install source. Press Enter.
5. In the Action Code field, type A (Add).
6. In the Plan Name field, type a name for the new upgrade plan you will use to install source only.
7. In the Description field, type a description for this new plan. Press Enter.
8. In the Plan Name field, type the name of the upgrade plan you added and press Enter.
9. Press F5 to enter upgrade data. The Libraries for This Plan screen appears.
10. If your upgrade plan does not have a SRC library type, you must add one.
11. In the Install Source Library field, type 1.

   NOTE: If you are not able to set the Install Source Library field to 1, then you are not licensed to install source. If you have questions, call J.D. Edwards Worldwide Customer Support.

12. In the Install Object/Data Libraries field, type 0.
13. Press Enter twice.

NOTE: If the Coded Character Set ID (CCSID) for your system value QCCSID is set to 65535, and if the CCSIDs associated with your data dictionary and DREAM Writer files do not match each other, the following window appears after you press Enter from the Libraries for This Plan screen. If it appears, contact J.D. Edwards Worldwide Customer Support for assistance.

![96003X REINSTALL LANGUAGE EXCEPTION](image)

The Systems to Install/Upgrade screen appears.

14. Verify that the systems for which you will install source are the same ones for which you already installed object and data. If you change this screen, press Enter.

15. Do not change any other upgrade planner screens, but press F3 (Exit).

16. From the Software Upgrade Menu (A97IBM), select Start the Upgrade. The JDE Upgrade Command (JDEUPGRADE) screen appears.

![JDE UPGRADE COMMAND (JDEUPGRADE)](image)

17. In the Upgrade Type field, enter *INSTALL or *PTF, whichever is appropriate.

One or more of the highlighted fields shown above appear on your screen depending on whether you specify *INSTALL or *PTF in the Upgrade Type field.
18. In the Plan Name field, type the name of the upgrade plan you set up to install source only.

19. The media field defaults to 0. If you installing from CD-ROM, change this field to 1.

20. Verify that the values in the Current JDE Release Level and New JDE Release Level fields match those that are in the upgrade plan.

21. If you are upgrading to a PTF level, you must type the name of the PTF library (for example, A81PC00001) in the JDE PTF Library field. This name must be the same as you typed in the New JDE Release Level field. To avoid an error, do not blank this field out or leave it set to *NONE.

You also must set the PTF Step Option field to 0 (Run Both).

22. Leave the value in the Hold Install Job on Job Queue set to 0.

23. Press Enter.

The INS_STEP1 and INS_STEP2 jobs (for install), or the PTF_STEP1 and PTF_STEP2 jobs (for PTFs), submit to batch.

24. After these jobs complete, you must run the Software Versions Repository merge. For information about how to run this merge, see Merges and Control Files (Reinstallations Only) in this publication.

NOTE: If you are a new client and you have not created your production libraries, do not run the Software Versions Repository merge.
Appendix A - Restore Libraries from the Storage Media

You can restore system libraries from the storage media you received from J.D. Edwards if you are licensed for the systems. For example, you can restore the libraries for the Accounts Payable system (system code 04), such as those for data (#JDFD04), programs (#JDFO04), and source (#JDFS04).

Procedure

To restore a library:

1. Mount the storage medium that contains the library you want to restore.

2. Select Restore Appl Savf From Media from the Advanced Upgrade Utilities menu (G97R42A).

3. In the System Code field, type the system code assigned to the library you want to restore (for example, 04).

4. In the Tape Label (Library Name) field, type the name of the library you want to restore from the storage medium (for example, #JDFD04).

5. In the Restore to Library Name field, type the name of the library on your machine to which you want the information restored.

6. In the Media Type field, type either TAP for tape, or OPT for CD-ROM.
7. In the Device field, enter your device name (for example, TAP01 for tape, or OPT01 for CD-ROM).