

JD Edwards World

Upgrade Guide

Release A9.4

E58799-01

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Describes how to upgrade JD Edwards World software to JD Edwards World A9.4 Release.

JD Edwards World Upgrade Guide, Release A9.4

E58799-01

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Preface

Welcome to the JD Edwards World Upgrade Guide.

Audience

This guide is intended for implementers and end users of JD Edwards World releases A7.3, A8.1, A9.1, A9.2, and A9.3.

Documentation Accessibility

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Related Information

For additional information about JD Edwards World applications, features, content, and training, visit the JD Edwards World pages on the JD Edwards Resource Library located at:

<http://learnjde.com>

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Indicates cautionary information or terms defined in the glossary.
<i>italic</i>	Indicates book titles or emphasis.

Phase One - Upgrade Process Overview

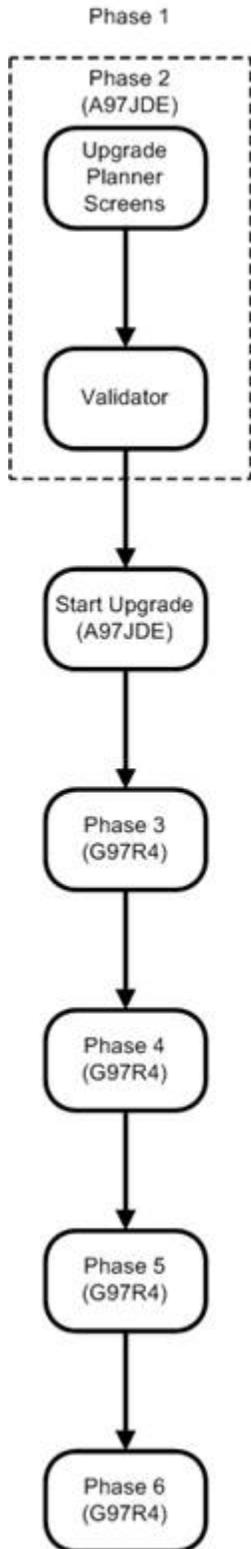
This chapter contains these topics:

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

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

Figure 1-1 Upgrade Process

Process Flow



Process Highlights

- Overview

- Restore data libraries to alternate names
- Planning the Upgrade screen
- Libraries for This Environment screen
- Merge Information screen
- Printer Information screen
- Advanced Options screen
- Data Dictionary Field Ownership screen

- Upgrade Planner Validation Report
- Duplicate Files Found Report
- Data Dictionary Field Ownership Report

- Change Message Break mode
- Start the Upgrade
- Inquire on File Conversion status

- Change QJDF Data Area
- Update Install History
- Activate Installed Systems
- Build new Files List
- Create new Files
- Print menu, Automatic Accounting Instruction (AAI), and User-Defined Code (UDC) Reports
- Update menus, AAIs, and UDCs
- Menu Comparison Report
- Data Dictionary Workbench
- Create ASI Report
- Work with instructions (ASIs)
- Review DREAM Writer Versions Workbench

- Rebuild menu word search
- Run special application status
- Rebuild DD/VO

- Display and delete 'Z' libraries
- Print the File Conversion Status Report
- Test the alternate environment

- Upgrade production environment

1.1 Upgrade Methodology

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

- Allows users to test the upgraded JD Edwards World software with copies of your data files. When you are satisfied with the testing, you can then upgrade your production environment.
- Users can be trained in the alternate environment while continuing your daily processing in the production environment.
- Modified or custom programs can be updated and tested in the alternate environment to verify they work with the upgraded software.
- Timings from file conversions in the alternate environment will help you plan for upgrading the production environment.

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

1.1.1 Alternate Environment Set up

Note: Before setting up the Alternate Environment, make sure you have performed the instructions in the A9.4 Quick Installation Guide.

The only libraries that will exist in the alternate environment before you start the A9.4 upgrade are copies of your production libraries. This includes data, control, and security files. You should restore the libraries from a backup tape. Until the A9.4 upgrade is complete, you will not be able to sign into the alternate environment.

1.1.2 Disk Space Considerations

It is recommended that you have enough disk space to restore a copy of your data libraries, space for a full A9.4 set of software, which is 7 gigabytes and another 10% of your data libraries combined size. For A9.4, most conversions are done as in place conversions, thus extra space is not needed for an additional copy of the file as in upgrades prior to A9.1.

1.1.3 Duplicate Files Rule

The upgrade process does not allow duplicate files to exist in the customer data libraries defined in an upgrade plan (control, data, and security files). In preparation for the upgrade in the alternate environment, remove duplicate files from the appropriate library. The validation process of the upgrade identifies any remaining duplicate files and produces a report. Any duplicate files on the report need to be cleaned up before initiating the upgrade. Evaluate the number of records in each duplicate file and note that the system updates the first file in the library list before removing a duplicate file. The file that is going to be deleted must not contain any records needed for processing.

1.1.4 Control File Dependencies

To avoid problems when you use or upgrade JD Edwards World software, make sure specific sets of control files and their associated logical files are together in the same

library on your machine. For a list of the control files, see [Section A, "Control File Dependencies."](#)

1.1.5 Monitor Changes to JD Edwards World Control Files

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

Dual Maintenance

Apply all changes made to the JD Edwards World production control files and the alternate environment. Synchronize the files in both places. For a list of control files, refer to the Control File Changes Monitored chart in [Section 6.6.2, "Update Your Applications."](#)

Note: If you use system 12 (Fixed Assets) or system 83 (FASTR) and plan to monitor the changes to DREAM Writer, you must use the dual maintenance method to monitor your changes and maintain your STAR and FASTR versions in both the production and alternate environments. When you upgrade your production environment in Phase Six, you need to copy these system files along with the DREAM Writer files. For more information, see the Note in the [Section 6.6.2, "Update Your Applications."](#)

Control Changes

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

Track Changes

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

You can use Data Base Audit Manager to track changes made to control files. For more information, refer to the *JD Edwards World Database Audit Manager Guide*.

1.2 Pre-Upgrade Application and Technical Instructions

1.2.1 Sign on to Production Environment

The instructions in this section should be performed in your production environment. In the next Phase, you will back up and restore the data libraries from your production environment to set up your A9.4 alternate (test) environment.

Note: As of A9.3, J98INIT as the Initial Program on the IBM profile is obsolete. Only J98INITA is supported for A9.4.

1.2.2 Run Integrity Reports

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

1.2.3 Accounts Payable

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

1.2.4 Menu History File

Be aware that the Menu History File (F0082H) is cleared during the Upgrade process.

1.2.5 Custom Menus

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

1.2.6 Contract Billing and Service Billing

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

1.2.7 Delete Vocabulary Override Record

Use option 13 on menu G90 to delete the V06053A1 Vocabulary Override record with Application Override 77 (77 in the Applic. Override field) if the record exists.

1.2.8 Manufacturing - A7.3 Customers

Rate Schedules are not converted during the A9.4 upgrade. Rate Schedule files and programs changed significantly between A7.3 and A8.1/A9.4. Rate Schedules were replaced with Repetitive Schedules which use the same menu, G3115.

Prior to the upgrade, close all open Rate Schedules in A7.3. Open new Repetitive Schedules in A9.4.

See Doc ID 662219.1 on My Oracle Support.

Close all work orders and run manufacturing and variance accounting before the upgrade.

1.2.9 Sales Orders and Purchase Orders - A7.3 and A8.1 Customers

Software Updates A738355623 and A814653295 are available from the Update Center to assist customers in identifying duplicate sales lines at an open status in the Sales Order (F4211) file. The duplicate sales lines must be cleaned up before setting up the alternate environment or the F4211 file conversion will fail. The update also checks for duplicates in the F4301 file for customers who also use the localization file F76431.

Note: For A738355623, the Print Duplicate Sales Line is option 17 on menu G4231.

1.2.10 EnterpriseOne (OneWorld) Files - A7.3 Customers

Customers who previously installed EnterpriseOne, are likely to have EnterpriseOne formatted files in their environment. Those files have 'F' for format name instead of 'I' when doing DSPFD on the file. You must delete those files from your environment before setting up your alternate environment in Phase Two. Failure to delete the EnterpriseOne files affects the file conversion process of the upgrade. A Software Update (A738428634) is available from the Update Center to assist you in determining if you have EnterpriseOne formatted files in your environment. Run the P98670 job over your A73 production data libraries.

1.2.11 Database Audit Manager and Other Triggers

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

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

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

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

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

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

Phase Two - Planning and Upgrading the Alternate Environment

This chapter contains these topics:

- Section 2.1, "Overview,"
- Section 2.2, "Set Up an Environment,"
- Section 2.3, "ALL CUSTOMERS - JDEORACLE Object Type Authority,"
- Section 2.4, "Check for DDM Files,"
- Section 2.5, "IBM Journaling,"
- Section 2.6, "Payroll - A7.3 Customer,"
- Section 2.7, "Delete Files,"
- Section 2.8, "DREAM Writer Work Files,"
- Section 2.9, "Create and Validate Upgrade Plan."
- Section 2.10, "Start the Upgrade and Track Progress."

2.1 Overview

For this phase of the upgrade, first, restore a set of your A7.3, A8.1, A9.1, A9.2, or A9.3 data libraries. Next, use the DVD for PC or download the A9.4 software from Oracle's Software Delivery Cloud site. Set up an upgrade plan, which defines which data libraries will convert during the upgrade process and the libraries which will contain the new A9.4 software. After the upgrade plan is set up, initiate the upgrade command.

2.2 Set Up an Environment

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

The first step in the upgrade process is to use a recent backup tape to restore your data libraries to another set of libraries. This includes libraries for data, control, and security files. Do not restore a copy of your production object, source or JDFDATA libraries as the A9.4 copy will be restored during the upgrade process.

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

If you were unable to deactivate triggers from the files used to create your alternate environment, you must remove the triggers from the files in your alternate libraries.

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

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

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

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

2.3 ALL CUSTOMERS - JDEORACLE Object Type Authority

The A9.4 software is delivered locked down. During the OUI process, library JDEORACLE was restored to your machine. This library contains DEFAULT objects for each object type delivered in the software. The authority for the DEFAULT objects is *PUBLIC *EXCLUDE. Before starting the upgrade, the Security Administrator MUST set the authority for each DEFAULT object appropriately. Use the EDTOBJAUT command to verify the authority setting you have in your current JDE environment for each object type. The DEFAULT objects will be referenced during the upgrade. When an object is created, the new object will have the authority of the DEFAULT object in library JDEORACLE.

The authority for the DEFAULTLIB object in library JDEORACLE should match the authority for the CRTLIB command on your machine.

Additionally, the authority for the JDEORACLE library must be at a minimum *PUBLIC *USE.

You may also change the owner of the DEFAULT objects in library JDEORACLE using the CHGOBJOWN command. All users must then have *ADD rights to that user profile.

2.4 Check for DDM Files

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

2.5 IBM Journaling

IBM Journaling must be turned off on files that are part of the upgrade plan before you start the A9.4 upgrade.

2.6 Payroll - A7.3 Customer

For release A9.4, for customers upgrading from A7.3, the upgrade process moves all user-defined codes and data dictionary items associated with the previous Payroll

system (06) to the Enhanced Payroll system (07). Review customized User Defined Codes and Data Dictionary items as they will also be moved to system code 07.

Some A7.3 customers have an entry for User Defined Codes 07/BC, 07/DB, 07/DM, 07/GR, 07/PC, 07/PF, 07/PG, 07/SC, 07/SG 07/ST, or 07/WP. These values and the UDC Code Type (F5 from the UDC screen) need to be deleted in order to bring over the values correctly. If you have entries for any of these User-defined Codes, you must delete them now. Use option 3 on menu G90 to view User Defined Codes.

2.7 Delete Files

- CRTLIB templib
- DLTF FILE(dtalib/F74R0430L*) where dtalib is your data library
- DLTF FILE(dtalib/F74R0430)
- DLTF FILE(dtalib/F74R0433)
- CRTDUPOBJ OBJ(F74R0411) FROMLIB(dtalib) OBJTYPE(*FILE) TOLIB(templib) DATA(*YES)
- DLTF FILE(dtalib/F74R0411)
- CRTDUPOBJ OBJ(F74SC165) FROMLIB(dtalib) OBJTYPE(*FILE) TOLIB(templib) DATA(*YES)
- DLTF FILE(dtalib/F74SC165)
- CRTDUPOBJ OBJ(F76B620) FROMLIB(dtalib) OBJTYPE(*FILE) TOLIB(templib) DATA(*YES)
- DLTF FILE(dtalib/F76B620L*)
- DLTF FILE(dtalib/F76B620)
- CRTDUPOBJ OBJ(F74SL349) FROMLIB(dtalib) OBJTYPE(*FILE) TOLIB(templib) DATA(*YES)
- DLTF FILE(dtalib/F74SL349)
- CRTDUPOBJ OBJ(F74SL7TA) FROMLIB(dtalib) OBJTYPE(*FILE) TOLIB(templib) DATA(*YES)
- DLTF FILE(dtalib/F74SL7TA)

2.8 DREAM Writer Work Files

Check to see if there are records in the F9835 and F9837 files in your data library using the DSPPFM command. If there are records, use CLRPFM for both the F9835 and F9837 files.

2.9 Create and Validate Upgrade Plan

2.9.1 Sign on as JDEINSTAL to Access the Software Upgrade Menu

Figure 2–1 Software Upgrade Menu screen

```

A97JDE                                JD Edwards World                                JDEWDS1
                                Software Upgrade Menu

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

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

New Installations
11. World Express Install

90. Signoff

Selection or command
===> _

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

```

2.9.2 Create Upgrade Plan

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

Figure 2–2 Plan the Upgrade screen

```

960099                                Plan the Upgrade

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

Enter the name of a Plan.

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

We recommend you review the following:

ZJDE      - Simple production plan
ZJDE_ALT - Alternate upgrade plan

** Press F5 key to enter Upgrade Data **

F3=Exit   F5=Plan Data

```

This screen is the first of a series of upgrade planner screens, all of which are described below. For more information on the upgrade planner screens - see [Appendix B, "Upgrade Planner Screens."](#)

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

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

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

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

The Libraries for This Plan screen appears.

Figure 2-3 Libraries for This Plan screen

```

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

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

Specify all libraries for the plan that contain J.D. Edwards
files and programs. Exclude IBM libraries such as QGPL and QTEMP.
Specify current software release level and the release to upgrade to.
    Current JDE Release Level. . . . . A73
    New JDE Release Level. . . . . A94
    Production LSF Library . . . . . JDFOBJ
    Install Source Library . . . . . 1 (1=Yes, 0=No)
    Install Object/Data Libraries. . . 1

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

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

```

2.9.3 Indicate the Libraries for this Plan

The Libraries for This Plan screen allows you to specify your current and new JD Edwards World release levels, whether you want to install object and data only or source only, and the libraries that define one complete environment. If you have payroll in a separate data library, it must be included as a second DTA type in the plan. It is recommended that you install source.

You can view source only first, set the Install Source Library value to '1' and the Install Object/Data Libraries value to '0'. If you are installing source only, the plan needs to have a JDF and OBJ type library that are populated. You can specify your A7.3, A8.1, A9.1, A9.2, or A9.3 libraries.

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

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

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

2.9.5 Indicate the Printer Information

Figure 2-5 Printer Information screen

```

96001D                               Plan the Upgrade
                                      Printer Information

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

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

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

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

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

F12 or Enter=Previous                F24=More Keys

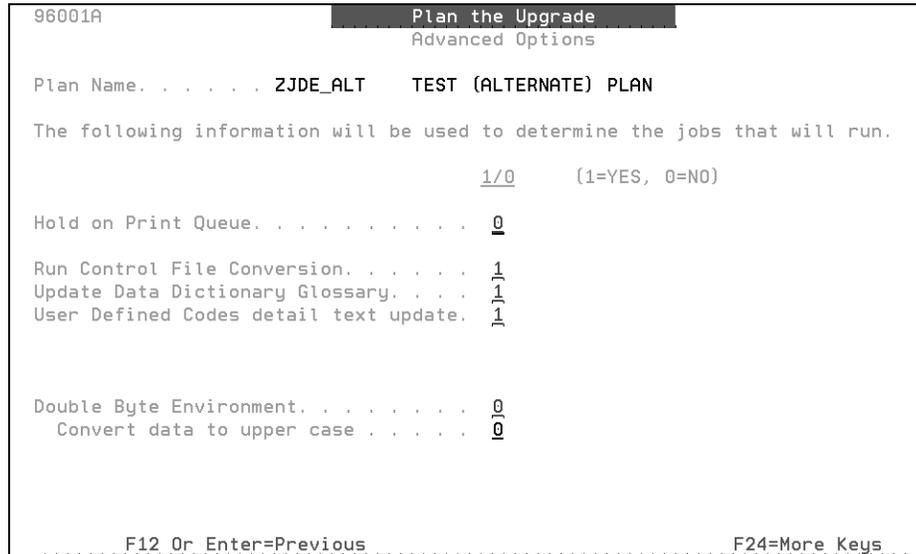
```

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

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

2.9.6 Select Advanced Options

Figure 2–6 Advanced Options screen



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

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

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

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

2.9.7 Designate the Data Dictionary Field Ownership information

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

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

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

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

Figure 2-7 Data Dictionary Field Ownership screen

```

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

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

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

                                F12=Previous Screen   F24=Move Keys

```

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

Press Enter.

2.9.8 Validate Your Upgrade Plan

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

MULTI-PLANS: You must validate each plan.

Create the validation reports

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

Figure 2-8 Processing Options Revisions screen

98312	Processing Options Revisions	Form ID. . . . P96004YR
ZJDE - Upgrade Planner Validation Report		Version. . . . ZJDE0001
		Display Level. . .
This job has various options described below. Enter the desired values and press Enter to continue.		
Enter Environment Name You Wish to Validate		<u>YOUR PLAN NAME</u>
Enter 1-If this is a First Time Install or 0-if you are Upgrading		<u>0</u>
Enter 1-to check for duplicate objects or 0-to bypass check		<u>1</u>
Enter Upgrade Type - *INSTALL *REINSTALL *PTF or *ALT		<u>*REINSTALL</u>
F5=Printer Overrides		

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

Specify 0 in the second field and 1 in the third field, which indicates you want a report created that checks for duplicate files. Specify *REINSTALL in the fourth field.
4. After you verify your information, press Enter.

The report submits to batch.
5. If you receive a message that one or more errors occurred, you have errors listed in the Upgrade Planner Validation Report (R96004YR) and/or duplicate files listed in the Duplicate Files Found Report (R97281). If the duplicate files report shows T files in a data library, you need to delete them as they only belong in the object library.

The Upgrade Planner Validation Report

The report (R96004YR) identifies errors in the information you specified in your upgrade plan. It lists the plan information as you entered it and prints error codes to the right of the incorrect information. A total number of errors are given at the end of the plan information. The error codes that appear on the report are fully described at the end of it, including error descriptions, cause statements, and instructions about resolving the errors. The report must have an error count of zero before you can begin the upgrade process.

Figure 2-9 Upgrade Planner Validation Report, part 1

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

96004YR		Upgrade Planner Validation Report - ZJDE ZJDE Environment	Page - . . . 2 Date - . . . 11/29/11
Plan Name	User ID	Plan Name	ERROR CODES
-----	-----	-----	-----
UPGRADE	JDEINSTAL	Upgrade	
Plan Libraries		Current JDE Release Level. A73	
		New JDE Release Level. A93	
		Production LSF Library 1	
		Install Source Library 1	
		Install Object/Data Libraries. 1	
		Type Library Name Library Description	
		COM CLTCRT CLIENT'S COMMON LIBRARY	
		DTA CLTDRT CLIENT'S DATA LIBRARY	
		SEC JDEUSERS CLIENT'S SECURITY LIBRARY	
		JDF JDFDRT JDE DATA LIBRARY	
		OBJ JDFORT JDE OBJECT LIBRARY	
		SRC JDFSRT JDE SOURCE LIBRARY	
Conversion Library Existence		Library Name	
-----	-----	-----	-----
		ZCLTCRT	3733,
		ZCLTDRT	3733,
96004YR		Upgrade Planner Validation Report - ZJDE ZJDE Environment	Page - . . . 3 Date - . . . 11/29/11
Plan Name	User ID	Plan Name	ERROR CODES
-----	-----	-----	-----
UPGRADE	JDEINSTAL	Upgrade	
Merge Information		Data Dictionary Merge (F9200-F9205) . . . 2	
		Vocabulary Overrides Merge (F9220) . . . 2	
		DREAM Writer Merge (F9830L) 2	
		Menu Master Merge (F0082) 2	
		User Defined Codes Merge (F0004,F0005) . . 2	
		Generic Messages/Rates Merge (F0019) . . . 2	
		Help Master Merge (F98HELP) 3	
		Software Versions Repository Merge . . . 2	
		Generic Text Keys Merge. 2	
		Auto Acct Instructions Merge 2	
		Next Numbers Merge 2	
		Data D/vocab override Rebuild. 0	
		Data Dictionary Library. CLTCRT	
		Vocabulary Overrides CLTCRT	
		DREAM Writer CLTCRT	
		Menu Master CLTCRT	
		User Defined Codes CLTDRT	3142,
		Generic Messages/Rates CLTDRT	3142,
		Help Master CLTCRT	
		Software Versions Repository CLTCRT	
		Generic Text Library CLTCRT	
		Auto Acct Instructions Files CLTDRT	
		Next Numbers Files CLTCRT	
		Override Print Options 0	
		Output Queue QPRINT	
		Width of your Form 132	
		Length of your Form. 68	
		Overflow Line. 62	
		Characters per Inch. 15	
		Lines per Inch 8	
		Form Type. *STD	
		Number of Copies 1	
		Hold on Print Queue. 0	
Printer Information			
-----	-----		
		Run Control File Conversion. 1	
		Update Data Dictionary Glossary. 1	
		User Defined Codes Text Flag 1	
		Delete Obsolete Menus 0	
		Double Byte Environment. 0	
		Convert Data to Upper Case.	
(Total Errors = 004)			
(Warnings = 000)			

Figure 2-10 Upgrade Planner Validation Report, part 2

96004YR		Upgrade Planner Validation Report - ZJDE ZJDE Environment	Page - . . . 4 Date - . . . 11/29/11
Plan Name	User ID	Plan Name	ERROR CODES
-----	-----	-----	-----
UPGRADE	JDEINSTAL	Upgrade	
	3142	CAUSE . . . ERROR: File does not exist in this library.	
		RESOLUTION. . The named file does not exist in this library. To determine the	
		location of a specific file, the following IBM command should be	
		used:	
		WRKOBJ OBJ(*ALL/'file name') OBJTYPE(*FILE)	
		NOTE - when entering the file name, do not include the single	
		quotes ().	
	3733	Cause.....ERROR: The work library exists from a previous upgrade.	
		Resolution...Display the library to review the contents. If the library is	
		empty you must delete it. If not, contact Technical Response	
		Line before continuing with the upgrade.	

The Duplicate Files Found Report

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

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

Figure 2–11 Duplicate Files Found Report

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

The DD Field Ownership Report

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

2.10 Start the Upgrade and Track Progress

2.10.1 Change Messages to Break Mode

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

2.10.2 Start the Upgrade

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

Figure 2–12 JDE Upgrade Command screen

```

JDE Upgrade Command (JDEUPGRADE)

Type choices, press Enter.

Upgrade Type . . . . . > _____ *PTF, *INSTALL, *REINSTALL...
Upgrade Plan Name . . . . . > _____ From Upgrade Planner
      + for more values
Source Media . . . . . > _____ Device Name, *SAVF, *DISK
Current JDE Release Level . . . . . > _____ From Upgrade Planner
New JDE Release Level . . . . . > _____ From Upgrade Planner
Run Validator Program . . . . . 1 1=Yes, 0=No
Restore SQL *SAVF . . . . . 0 1=Yes,0=No
Hold on job Queue . . . . . 0 1=Hold on Jobq,0=Do not hold

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

2. In the Upgrade Type field, enter *REINSTALL.
3. In the Plan Name field, type the name of the upgrade plan that defines the environment you want to upgrade.

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

5. In the Current JDE Release Level field, type the current JD Edwards World software release level of the environment you want to upgrade (A73, A81, A91, A92, and A93 are valid values).
This release level must match the current JD Edwards World release level specified in the upgrade plan.
6. In the New JDE Release Level field, type A94.
This release level must match the new JD Edwards World release level specified in the upgrade plan.
Leave the default value for the Run Validator program field.
7. For the Restore SQL *SAVF field, if you use Adopted Authority, change this field to '1'. Otherwise, leave the default value of '0'. As of A9.4, during the upgrade process, there will be a second restore to the object library for SQL programs if the value is '1'. Press Enter.
8. Leave the default value for the Hold on job Queue field.
9. Press Enter.

2.10.3 Track the Progress of the Upgrade

The first part of the upgrade process (UPG_STEP1) restores the software from the save files in the JDEINSTAL2 library and sends you a message when system 00 is restored. All systems are included in system 00.

The second part of the upgrade process will be jobs (J97910) that will update the objects in the JDF, OBJ, SRC type libraries in your upgrade plan based on the DEFAULT security and ownership values you set up for each object type in the JDEORACLE library before you started the upgrade. There will be a job for each JDF type in your upgrade plan. The spool files (JDEOBJAUT, JDEDTAUT, and JDESRCAUT (if source is installed)) produced by the J97910 jobs will show the changes made to the objects in the JDF libraries.

The last part of the upgrade process (UPG_STEP2) submits merges and converts files. These jobs run in the JDEINSTAL subsystem in separate job queues.

Note: UPG_STEP2 will halt if there are trigger programs attached to files in your alternate environment data libraries. A query report is produced listing the files with triggers attached. Use the RMVPFTRG command to remove the triggers. You may restart the Upgrade by typing *ALT for the Upgrade Type and *DISK for Source Media on the Start the Upgrade command.

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

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

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

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

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

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

2.10.4 Inquire on File Conversion Status

After UPG_STEP2 completes, check for file conversions that completed abnormally and resolve any problems. For detailed information on the File Conversion process, see [Appendix C, "File Conversions."](#)

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

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

Figure 2–13 File Conversion Status Inquiry screen

```

972613                               File Conversion Status Inquiry
Plan Name . . . _____
Library Name . . _____
Conversion Sts . ____
Skip to File . . _____

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

```

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

2. In the Plan Name field, type the name of the upgrade plan for which you want to check file conversion status.
3. In the Library Name field, type the name of your common library.
4. In the Conversion Sts field, enter CA (Completed Abnormally).

5. To display the job log for a file conversion listed on this screen, in the OP (Option) field next to a file conversion job, enter 1 (Display the job log).
6. Repeat steps 3 through 5 for your data and security libraries.
7. Note any files that failed conversion and resolve any problems before you continue with the upgrade. For assistance, call JD Edwards World Technical Support. If you need to run single file conversion programs, first you need to perform the following two steps (as noted in Phase Three):
 - Change the QJDF Data Area in JDFOBJALT.
 - Sign On as the Security Administrator User ID you entered during the OUI process. This is the only user who will be able to access the Alternate Environment you want to update until you perform Post Install jobs and evaluate how you want to open up security in the environment. In A9.4, the security setup is delivered in a “no access” state.

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

Go to the Next Phase

Phase Three - Create New Files and Update Control Files

This chapter contains these topics:

- Section 3.1, "Overview,"
- Section 3.2, "Change the QJDF Data Area in JDFOBJALT,"
- Section 3.3, "Sign On as the Security Administrator User ID you entered during the OUI Process,"
- Section 3.4, "Activate Installed Systems,"
- Section 3.5, "Create New Files,"
- Section 3.6, "Optional Files,"
- Section 3.7, "Run the Menu Comparison Report,"
- Section 3.8, "Print Menu, User Defined Code, and New Automatic Accounting Instruction (AAI) Reports,"
- Section 3.9, "Update the Data Dictionary Files Using Data Dictionary Workbench,"
- Section 3.10, "Create/Print ASI Report/Apply ASIs/DREAM Writer Workbench."

3.1 Overview

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

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

3.2 Change the QJDF Data Area in JDFOBJALT

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

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

Note: With A9.4, there is no Software Protection Code. If you wish to use Software License Manager in Audit Mode, you will only be able to do that when you are live on A9.4 and have no other environments using Software License Manager on your machine.

3.3 Sign On as the Security Administrator User ID you entered during the OUI Process

During the upgrade process, the JDEPROD library list is set up with the libraries from the upgrade plan. The description is JDE World A9.4 Production.

Note: If you have multiple plans, the JDEPROD library list is only set up for the first plan.

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

The Install History (Type 97 on command line) in the new object library for A9.4 will only contain a record for the upgrade you just completed. You can copy in the install history records from your production object library so that when you GO LIVE on A9.4, you will have a complete install history. Use the following command to update the install history in A9.4:

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

where PRODOBJ is your production object library and JDFOBJALT is the name of your A9.4 object library.

3.4 Activate Installed Systems

From any JD Edwards World menu, enter G97R42.

From the Upgrade Utilities menu, take selection 6. Place a '1' in the OP field next to any application system, you will start using with the A9.4 release. Place a '2' in the OP field next to any application system you will no longer use. Before activating new application systems, check your contract to ensure that you are licensed to that application. Additional information can be found in the help for this program.

Figure 3–1 Activate Installed Systems screen

99LSFA		Activate Installed Systems	
P	Code	Description	Status
0	Prod		
	D1D	DSI WorldRF	Active
	00	Technical Foundation	Active
	01	Address Book	Active
	01P	Purchase Cards	Inactive
	01R	Risk Management	Inactive
	02	Electronic Mail	Active
	03	Accounts Receivable	Active
	03B	Enhanced Accounts Receivable	Active
	04	Accounts Payable	Active
	05	Payroll/HR Base & Time Entry	Active
	07	Enhanced Payroll	Active
	08	Human Resources	Active
	09	General Accounting	Active
	10	Financial Reporting	Active
	10C	Multi-site consolidations	Inactive
	11	Foreign Currency/Cash Basis	Active
	11C	Cash Basis	Active

Opt: 1=Activate System 2=Deactivate System

3.5 Create New Files

3.5.1 Build New Files List Report

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

Figure 3–2 Post Upgrade menu

G97R4		JD Edwards World	JDED
Setup Operation		Post Upgrade Menu	
... UPDATE APPLICATIONS		... CREATE FILES/RUN JOBS	
2.	Print Upgrade Reports	14.	Build New Files List
3.	Control File Updates	15.	Create New Files
4.	Create ASI Report	16.	Rebuild Menu Word Search
5.	Print ASIs	17.	Run Special Application Jobs
6.	Work With Instructions (ASIs)		
7.	DREAM Writer Review Workbench		
		... REVIEW REPORTS/STARTUP	
		23.	Utilities
		24.	Start JDE Subsystems
Selection or command			
==>			
Wed, Jan 28, 2015		JDE World A9.4 Production	LH3914
6:53:43pm		Copyright © 2015, Oracle	QPADEV000T

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

The report job is sent to batch for processing.

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

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

3.5.2 Create New Files

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

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

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

Figure 3–3 Create New Files screen

```

97453                               Create New Files                               File Count . . .
Plan Name . . . . . _____
Rpt System Code . . . . . _____
File Type (PF/PFS/LF/*) . . . _____
Com/Data/*ALL (C/D/*) . . . _____
From Library. . . . . _____ Source Library. . . _____
Create In Library . . . . . _____

Opt File Name  Sys  Tup Com  Data  Description
-----
Opt: 1=Use Source  2=CrtDup wo/Data  3=CrtDup w/Data  F4=Dtl F5=JDE Dfts
    
```

2. Type the name of the upgrade plan in the Plan Name field for the environment in which you want to create the new files.
3. Type C to show all the common files (in the Com/Data/*ALL field).

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

4. Enter the name of the alternate common library (in the Create In Library field) in which you want the files created. This library must be defined in the upgrade plan.
5. After you verify your selections, press Enter.

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

Figure 3-4 List of Recommended Files to be Created

```

97453                               Create New Files                               File Count . . . 266

Plan Name . . . . . A94REG                               SIMPLE PRODUCTION PLAN
Rpt System Code . . . . .                               All System Codes
File Type (PF/PFS/LF/*) . . . . .                       All File Types (PF/PFS/LF/*)
Com/Data/*ALL (C/D/*) . . . . . *                       All Files (Common and Data)
From Library. . . . . JDFDREG                             Source Library. . . . . JDFSREG
Create In Library . . . . . DTA94REG

Opt File Name Sys Typ Com Data Description
] F00A11JB 00A LF N N JF - Approvals Transaction (F00A11, F061
] F00HELP1 98 PFS N N Help Instructions
] F0011LE 00 LF N N LF - RNID SBM
] F0018LH 00 LF N N LF - Run ID, post, batch type, batch num SBM
] F0060JA 00 LF N N JF - Values List (F0060 F00601) SBM
] F00900T 00 PFS N N Year-end IVA Tape File - Italy-Src gener SBM
] F01PBCW 01P PF N N WF - Travel and Expense Bank Card Work F SBM
] F01P00E 00 PF N Y Purchase Card Constants - Compile Purpos SBM
] F01P01JC 01P LF N N JF - PCard Employee/Card Activity Join ( SBM
] F01P01LD 01P LF N N Employee Purchase Card - LF - Card Type, SBM
] F01P04 01P PF N N Expense Category File SBM
] F01P04LA 01P LF N N LF - Expense Category File - BKCA, EXCA SBM

Opt: 1=Use Source 2=CrtDup wo/Data 3=CrtDup w/Data F4=Dtl F5=JDE Dfts
    
```

6. To select JD Edwards World default options for the Opt (Option) field to the left of each listed file, press F5 (JD Edwards World Defaults).
7. To create the new files, press Enter.
8. Repeat the steps in this checklist item, but specify the following values:
 - In the Com/Data/*ALL field, specify D to show all the data files.
 - In the Create In Library field, specify the name of the alternate data library in which you want the files created.

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

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

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

Note: If any logical file fails to create because of duplicate records, view the Duplicate Cleanup jobs on menu G97U64 (upgrading from A73) or G97U62 (upgrading from A81) before manually cleaning up duplicate records and then creating the logical using the CRTDUPOBJ command. If you use the special jobs on G97U64 or G97U62, you must delete the logical before running the special job, as the logical was created with no members during the create new files build.

3.6 Optional Files

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

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

3.7 Run the Menu Comparison Report

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

- Added new menus
- Added new selections to existing menus
- Removed obsolete selections from menus
- Changed selections on menus if there was a replacement program for an obsolete program

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

1. From the Control Files Update (G97R6) menu, select Menu Comparison Report.
2. In the O (Option) field next to ZJDE0001, enter 1 (Execute).

Figure 3-5 Menu Comparison Report, part 1

```

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

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

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

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

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

                                                                    +

                                                                    F5=Printer Overrides
    
```

Figure 3-6 Menu Comparison Report, part 2

```

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

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

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

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

                                                                    +

                                                                    F5=Printer Overrides
    
```

Figure 3-7 Menu Comparison Report, part 3

```

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

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

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

F5=Printer Overrides
    
```

3. Enter the processing options with appropriate information:
 - Processing Option one must have a '1'. If left blank, the G menus are deleted from your files
 - For processing option 2, enter a blank and the system creates a Menu Comparison report (R98340). After you review the Menu Comparison report, you can go back and set processing option 2 to a '1', if you want to overlay G menus. If you decide to overlay the G menus, you can then use the Menu Comparison report to make any custom changes such as menu masking.

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

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

- Processing option 3 is the JDF type library name from your plan
 - Processing option 4 is the COM type library name from your plan, assuming that is the library containing the menu files
4. If you did not enter a '1' for processing option 2, use the Menu Comparison report to make changes to your menus by either copying the menus or changing individual selections. Procedures for both methods are detailed in the Update the Menu files section.
 5. If you replace the 'G' menus, you will also need to copy any of the ZHIDDEN* menus listed on the menu comparison report using option 6 on menu G97R6.

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

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

The Work with Spooled Files (WRKSPLF) screen appears.

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

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

3.8.1 Update the Menu Files

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

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

How to use the Menu Exceptions Report

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

- New pgm for release
Indicates that the program was added to a menu. Consider setting up menu security for these menu selections.
- Program might be obsolete
Indicates that the program shown in the Job to Execute column on the report is obsolete and the merge did not find a program to replace it. The merge attaches a menu message warning to menu selections that access the obsolete programs. You must remove these programs from the menus unless the programs exist in a custom library.
- * Review Security
Indicates that you must review the menu selection for security setup. The selection is secured because it calls a job that was previously secured in your menu file. However, security setup is inconsistent, and requires your review.
- Cannot add sel to menu
Indicates that the merge unsuccessfully attempted to add a selection because no selection spaces were available on the menu. Use option 6 on menu G97R6 to copy the menu from the JDF Type library in your plan to the library containing the menu files.
- Opt key/vers not found
Indicates that the merge did not find a form ID or version in the DREAM Writer files. Ignore those that have *NONE in the Option Key field.

Figure 3-8 Menu Merge Exceptions report

FROM Library - JOFDRT TO Library - CLTCRT		J.D. Edwards & Company Menu Merge Exceptions		Page - 1			
Menu Id	Menu Title	Sl No	Selection Description	Job to Execute	Option Key	Version	Message
G00	General Systems	18	Business Values List Cats	00060			New pgm For release
G00VENDA	Buyer Self-Service - Stock		Enter Blanket Orders	04311	P4311	WJDE0006	Cannot add sel to menu
			Enter Quote Orders	04311	P4311	WJDE0002	Cannot add sel to menu
			Enter Requisitions	04311	P4311	WJDE0003	Cannot add sel to menu
			Receipts by Purchase order	04312	P4312	WJDE0001	Cannot add sel to menu
			Open Order Inquiry	0430301	P430301	WJDE0001	Cannot add sel to menu
			Open Requisitions Inquiry	0430301	P430301	WJDE0002	Cannot add sel to menu
			Open Quotes Inquiry	0430301	P430301	WJDE0003	Cannot add sel to menu
			Blanket Order Inquiry	0430301	P430301	WJDE0004	Cannot add sel to menu
			Supplier Ledger Inquiry	0042003	P042003	WJDE0001	Cannot add sel to menu
			Supplier Payment Inquiry	0042004	P042004	WJDE0001	Cannot add sel to menu
			Supplier Item Summary	043230	P43230	WJDE0001	Cannot add sel to menu
			Address Book	001051	P01051	WJDE0001	Cannot add sel to menu
			Item Search	041200	P41200	WJDE0001	Cannot add sel to menu
			Item Ledger - CARDEX	04111	P4111	WJDE0001	Cannot add sel to menu
			Summary Availability	041202	P41202	WJDE0001	Cannot add sel to menu
			Detail Availability	041023	P41023	WJDE0001	Cannot add sel to menu
			Buyers Information	04115	P4115	WJDE0001	Cannot add sel to menu
			Approval Review - PO	043080	P43080	WJDE0002	Cannot add sel to menu
			Orders Awaiting Approval	043081	P43081	WJDE0002	Cannot add sel to menu
			Requisitions Awaiting Approval	043081	P43081	WJDE0001	Cannot add sel to menu
			Approval Review - Reqs	043080	P43080	WJDE0001	Cannot add sel to menu
			Test P42180	042180	P42180	STEPHEN	Cannot add sel to menu
G00VENDB	Buyer Self-Service - Stock		Enter Blanket Orders	04311	P4311	WJDE0007	Cannot add sel to menu
			Enter Quote Orders	04311	P4311	WJDE0012	Cannot add sel to menu
			Enter Requisitions	04311	P4311	WJDE0009	Cannot add sel to menu
			Receipts by Purchase order	04312	P4312	WJDE0005	Cannot add sel to menu
			Open Order Inquiry	0430301	P430301	WJDE0001	Cannot add sel to menu
			Open Requisitions Inquiry	0430301	P430301	WJDE0002	Cannot add sel to menu
			Open Quotes Inquiry	0430301	P430301	WJDE0003	Cannot add sel to menu
			Blanket Order Inquiry	0430301	P430301	WJDE0004	Cannot add sel to menu
			Supplier Ledger Inquiry	0042003	P042003	WJDE0001	Cannot add sel to menu
			Supplier Payment Inquiry	0042004	P042004	WJDE0001	Cannot add sel to menu
			Supplier Item Summary	043230	P43230	WJDE0001	Cannot add sel to menu
			Address Book	001051	P01051	WJDE0001	Cannot add sel to menu
			Item Search	041200	P41200	WJDE0001	Cannot add sel to menu
			Item Ledger - CARDEX	04111	P4111	WJDE0001	Cannot add sel to menu
			Summary Availability	041202	P41202	WJDE0001	Cannot add sel to menu
			Detail Availability	041023	P41023	WJDE0001	Cannot add sel to menu
			Buyers Information	04115	P4115	WJDE0001	Cannot add sel to menu
			Approval Review - PO	043080	P43080	WJDE0002	Cannot add sel to menu
			Orders Awaiting Approval	043081	P43081	WJDE0002	Cannot add sel to menu
			Requisitions Awaiting Approval	043081	P43081	WJDE0001	Cannot add sel to menu
			Approval Review - Reqs	043080	P43080	WJDE0001	Cannot add sel to menu
G00VENDC	Buyer Self-Service - Encumbran		Supplier Payment Inquiry	0042004	P042004	WJDE0001	Cannot add sel to menu
			Address Book	001051	P01051	WJDE0001	Cannot add sel to menu
			Buyers Information	04115	P4115	WJDE0001	Cannot add sel to menu
			Approval Review - PO	043080	P43080	WJDE0002	Cannot add sel to menu
			Orders Awaiting Approval	043081	P43081	WJDE0002	Cannot add sel to menu
			Requisitions Awaiting Approval	043081	P43081	WJDE0001	Cannot add sel to menu
			Approval Review - Reqs	043080	P43080	WJDE0001	Cannot add sel to menu
G00141	Payment Terms Revisions	21	Update A/P Vouchers	0005141	P005141		New pgm For release
		22	Update A/R Invoices	0005142	P005142		New pgm For release
G00212	Japanese Consumption Tax	08	Japanese Era Dates	00089			New pgm For release

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

3.8.2 Copy the Entire Menu

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

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

Figure 3-9 Copy DD, VO, DW, UDC, SVR, Menus screen

```

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

From Library . . . . . PGFDTA93      To Library . . . . . _____

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

Vocabulary Overrides . _____  Language . ____  Appl Ovr . _____

DREAM Writer Form. . . . . _____  Language . ____

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

Software Versions Rep. _____

Menu Identification. . . _____

Generic Rate/Msg Sys . . . _____
      Type. . . . . ____

                                           F24=More
    
```

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

3.8.3 Update a Menu Selection

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

Figure 3-10 Menu Selections screen

```

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

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

3.8.4 Update the User-defined Code (UDC) Files

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

How to use the User Defined Code Merge Report

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

Figure 3-11 User Defined Code Merge report

Sys	Code	Code	Description 1	Description 2	Cde	2nd	Cde	Merge
987241 J.D. Edwards & Company Date - 11/22/11 User Defined Code Merge Page - 1 From - JDFORT To - CLTCRT Mode - Final								
00	AA		Generic Y, N only		01	N	N	New UDC Table
	AA	N	NO					F0005 Added
	AA	Y	Yes					F0005 Added
00	AB		Activity Based Cost Type		01	Y	N	New UDC Table
	AB	A	Address Book Number	Hard Coded Edit in F0101				F0005 Added
	AB	C	Business Unit Number	Hard Coded Edit in F0006				F0005 Added
	AB	E	Equipment Number	Hard Coded Edit in F1201				F0005 Added
	AB	I	Item Number (Short)	Hard Coded Edit in F4101				F0005 Added
	AB	L	Lease Number	Hard Coded Edit in F1501				F0005 Added
	AB	M	Summarized work order Number	Manufacturing Summarized J.E.				F0005 Added
	AB	O	Order Number	Hard Coded Edit in F4201				F0005 Added
	AB	W	Work Order Number	Hard Coded Edit in F4801				F0005 Added
00	AD		Approvals Rule Set Calculation		10	Y	N	New UDC Table
00	AT		Approval Type		02	N	N	New UDC Table
	AT	AB	Address Book					F0005 Added
	AT	PD	Purchase Order Detail					F0005 Added
	AT	PH	Purchase Order Header					F0005 Added
	AT	TC	Timecard					F0005 Added
	AT	01	Address Book RTE					F0005 Added
	AT	02	Item RTE					F0005 Added
00	AU		Approval Type (workbench)		02	N	N	New UDC Table
	AU	AB	Address Book					F0005 Added
	AU	P	Purchase Order (All)					F0005 Added
	AU	PD	Purchase Order Detail					F0005 Added
	AU	PH	Purchase Order Header					F0005 Added
	AU	TC	Timecard					F0005 Added
00	BE		Batch Export Enabled Program		10	Y	N	New UDC Table
	BE	P00EPURGE	EDD Transaction Purge Report					F0005 Added
	BE	P0018IE	English Format Intrastat report					F0005 Added
	BE	P0018IK	English Fmt Intrastat RPT DSK					F0005 Added
	BE	P0018IKL	English Fmt Intrastat RPT DSK					F0005 Added
	BE	P00922P	Security workbench Report					F0005 Added
	BE	P009253P	User Activity Summary Report					F0005 Added
	BE	P009254P	Menu History Summary Report					F0005 Added
	BE	P009255P	File Update Activity Summary					F0005 Added
	BE	P01P401	Employee Card Information Rpt					F0005 Added
	BE	P01301	Mailing Labels					F0005 Added
	BE	P014021	Mailing Labels - One Line					F0005 Added
	BE	P014031	Mailing Labels - Full w/Codes					F0005 Added
	BE	P014051	Mailing Labels - Full w/Notes					F0005 Added
	BE	P03413	A/R Detail Summary					F0005 Added
	BE	P034201	Accounts Receivable Detail -					F0005 Added
	BE	P035001	A/R Statements	AN81				F0005 Added
	BE	P03505	Print Invoices	AN81				F0005 Added
	BE	P035111	Delinquency Notices	AN8				F0005 Added
	BE	P03530	Payment Reminders	AN81				F0005 Added
	BE	P04423	A/P Detail by Supplier					F0005 Added
	BE	P04572B	A/P Payments - BACS	PYE				F0005 Added

3.8.5 Review and Update a UDC

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

Figure 3-13 New Automatic Accounting Instructions (AAIs) report

98727				J.D. Edwards & Company New Automatic Acctg Insts(AAI)	Page - 1
					Date - 11/22/11
					From Libr - JDFDRT
					To Libr - CLTORT
					Mode - Final

Item Number	Co	Sequence Number	Syst Code	Account Use Description
CC	00000			Expense Account - PCards
CCP	00000			Liability Account - PCards
ADR	00000	3.000	03	Book differences between F0311 and F0911 Distribution. Used by EURO Integrity - P03711.
AER	00000	3.000	03	Book differences between F0311 and F0911 AE offset. Used by EURO Integrity - P03711.
NC	00000	3.511	03	Netting Suspense Account
RCVATD	00000	3.110	03	Accounts Receivable Tax Retention-deferred tax
RC3015	00000	3.110	03	Accounts Receivable Class - Default if G/L Class code field is left blank. (Customer Master, Invoice Entry screens)
ADP	00000	4.000	04	Book differences between F0411, F0414 and F0911 Distribution. Used by EURO Integrity P04711 and P04712.
AEP	00000	4.000	04	Book differences between F0411, F0414 and F0911 AE offset. Used by EURO Integrity P04711 and P04712.
PXA901	00000	1.520	09	1099-MISC Direct Sales Beginning Range 1
PXA902	00000	1.520	09	1099-MISC Direct Sales Ending Range 1
PX0501	00000	1.520	09	1099-INT Investment Expenses Beginning Range 1
PX1502	00000	1.520	09	1099-INT Investment Expenses Ending Range 1
PX1601	00000	1.520	09	1099-Foreign Tax Paid Beginning Range 1
PX1602	00000	1.520	09	1099-Foreign Tax Paid Ending Range 1

3.8.7 Review and Update an AAI

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

Figure 3-14 Automatic Accounting Instructions screen

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

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

1. Press F15 (AAI Revisions).

Figure 3–15 Single AAI Revisions screen

```

0012                               Single AAI Revisions

Action Code. . . . . -
Item Number. . . . . _____
Company. . . . . _____

Sequence Number. . . . . _____
Product Code . . . . . _____

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

Account Use Description. _____
_____
_____
_____

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

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

3.9 Update the Data Dictionary Files Using Data Dictionary Workbench

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

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

1. From the Control File Updates menu (G97R6), select Data Dictionary Workbench. After reading the WARNING press F6.
2. Enter the name of the upgrade plan in the processing option on the Data Dictionary Workbench initial screen. Press Enter.

Figure 3-16 Data Dictionary Workbench initial screen

```

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

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

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

                                         F5=Printer Overrides
    
```

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

The From lib is the A9.4 JDF type library from your upgrade plan.

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

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

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

Figure 3-17 Data Dictionary Workbench screen

```

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

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

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

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

Each Data Dictionary item that does not have 'AJ' in the Rs Cd column requires a decision. In order to apply changes, you must place 'C' in the Action Cd field and press Enter to activate the Rs Cd field. F4 shows you the original value for the Data Dictionary field and the New A9.4 JDE Value.

The options are:

- J - The JDE World value is applied to your Data Dictionary.
- C - Your original value for the specified Data Dictionary field is retained.
- M - Manual Change has been applied.

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

Use option 2 (Versions List) on menu G81 to copy the ZJDE0002 for Form P98490 to your own version. Run your version to generate the ASI report.

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

Figure 3-18 Create ASI Report screen

98302		Create ASI Report		Form ID. . . . P98490	
				Version/Histor ZJDE0002	
ASI Report Instructions by System					
NUMERICS-DECIMAL POINTS ARE NOW ENTERED					
. . Selection . .					
I	Explanation	Rel.	Value		
N					
Y	Release	EQ	A94		
And Y	Product Code	EQ	*ALL		
And Y	ASI Type	EQ	*ALL		
And Y	Priority	EQ	*ALL		
And Y	ASI Parameter	EQ	*ALL		
And Y	Menu Job to Execute	EQ	*ALL		
And Y	SAR Number	EQ	*ALL		

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

- Change the Release value to A94, and press Enter.
- If you are upgrading from A7.3 or A8.1, create additional ASI reports for A91, A92, A92PC00001, A9.3, and A93PC00001.

If you are upgrading from A9.1, create additional ASI reports for A92, A92PC00001, A9.3, and A93PC00001.

If you are upgrading from A9.2, create additional ASI reports for A93 and A93PC00001.

3.10.1 Print ASI Report

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

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

Number	Description
R98490	ASI Report

3.10.2 Work with Application Specific Instructions (ASIs)

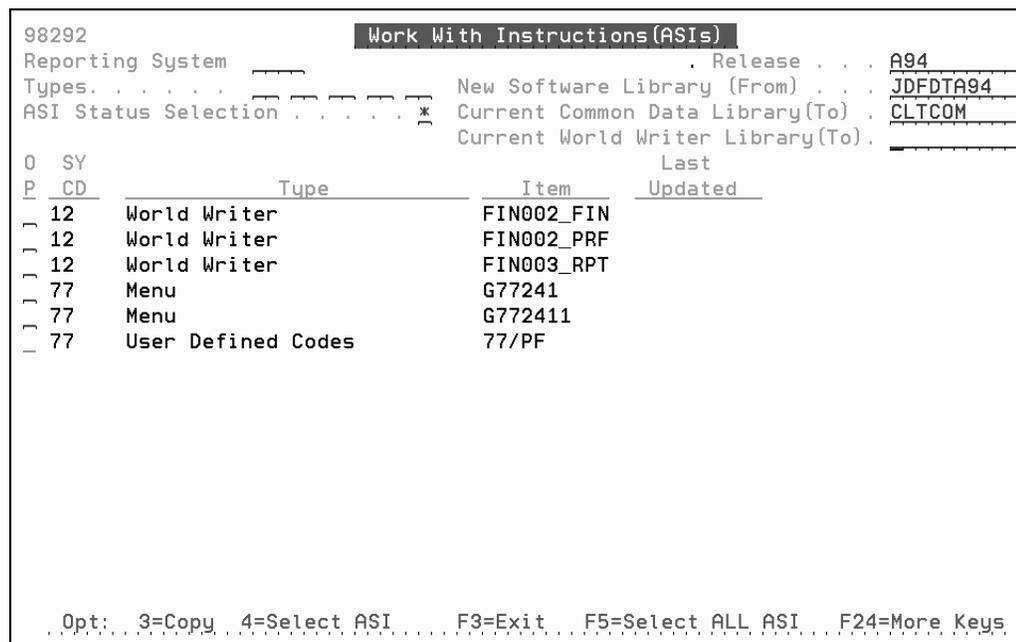
Run Special Job

Run the Create/Change P record for DW special job from menu G97U74.

Display the ASIs

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

Figure 3-19 Work with Instructions (ASIs) screen



1. In the Release field, type A94.

WARNING: If you are upgrading from release A7.3 or A8.1, you must display and apply the A91, A92, A92PC00001, A93, and A93PC00001 ASIs in consecutive order before you apply the A94 ASIs. If you are upgrading from A9.1, display and apply the A92, A92PC00001, A93, and A93PC00001 ASIs before you apply the A94 ASIs. If you are upgrading from A9.2, display and apply the A93 and A93PC00001 ASIs before you apply the A94 ASIs.

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

3. Leave the value in the ASI Status Selection field set to an asterisk (*), which displays all ASIs (whether applied or not).
4. In the Current Common Data Library (To) field, type the name of the alternate common library that contains the control files you want to update.
5. If you have the World Writer system, in the Current World Writer Library (To) field, type the name of the alternate data library that contains the F82100 World Writer file.
6. After you verify your information, press Enter and then press F5 (Select ALL ASIs).

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

Apply the ASIs

- If an ASI affects a file located in a library that is different than the one appearing in the Current Common Data Library (To) field on the Work With Instructions (ASIs) screen, change the library name in that field to the appropriate one.
- For DREAM Writer ASIs, each one instructs you to update a certain version for a form ID. You should update any other versions that are based on that version also.
- If you need to update secured DEMO DREAM Writer versions, you must unsecure them first by using the Report Version Security selection from the Security Advanced and Technical Ops menu (G9431).

The DEMO user profile must exist on the IBM side and in the F0092 file in the A9.4 environment. Use option 6 on menu G9401 if you need to set up the DEMO profile in the A9.4 environment.

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

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

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

Note: Some of the ASIs may already be done in your environment. For A9.4, some of the ASIs are from previous A7.3, A8.1, A9.1, A9.2, and A9.3 updates.

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

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

Figure 3-20 ASI Inquiry/Update screen

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

2. At this point, ASIs are applied two ways:
 - Copy the item affected by this ASI in its entirety from the JD Edwards World data library to your alternate data library, or
 - Update specific data associated with the item according to information contained in the ASI.

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

To copy the item in its entirety (F6).

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

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

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

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

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

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

4. Additional ASI Instructions:

- All customers - These are additional instructions for the F48019 DBAM ASI.

In step 6, the last paragraph is incomplete. The sentence should be – We recommend at minimum the following three fields have an option 2 placed on them (rather than option 1): WASRST (Status), WADRQJ (Requested Date), and WAUORG (Quantity Ordered). When finished, all fields should have a value of '1' or '2' placed on them. Press Enter. See Doc ID 1279122.1.

Additional Special Instruction

- "CPYF FROMFILE(templib/F74R0411) TOFILE(dtalib/F74R0411) MBROPT (*REPLACE) FMTOPT(*NOCHK)
- CPYF FROMFILE(templib/F74SC165) TOFILE(dtalib/F74SC165) MBROPT (*REPLACE) FMTOPT(*NOCHK)
- CPYF FROMFILE(templib/F76B620) TOFILE(dtalib/F76B620) MBROPT (*REPLACE) FMTOPT(*NOCHK)
- CPYF FROMFILE(templib/F74SL349) TOFILE(dtalib/F74SL349) MBROPT (*REPLACE) FMTOPT(*NOCHK)
- CPYF FROMFILE(templib/F74SL7TA) TOFILE(dtalib/F74SL7TA) MBROPT (*REPLACE) FMTOPT(*NOCHK)

TEMPLIB is the library you created in Section 2.7.

Note: There is a Special Instruction ASI related to the new Post program, P09870.

The new G/L Post program P09870 that replaces the P09800 program has DEMO DREAM Writer versions in the A9.4 release. Any customer DREAM Writer versions you had for P09800 will need to be recreated for P09870. Processing options for P09870 are the same as P09800.

Any custom programs that called either J09800 or P09800, will now need to call J09870 or P09870, respectively.

3.10.3 Use the DREAM Writer Review Workbench

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

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

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

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

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

DREAM Writer FORM	Version to Use for Verification
P013151	ZJDE0001
P74SC125	XJDE0001
P74SL650	XJDE0001
P082800	XJDE0001 or XJDE0002
P062001	XJDE0001
P00PURGE	ZJDE0029, ZJDE0030, ZJDE0031, ZJDE0032, ZJDE0045, or ZJDE0046
P30820	ZJDE0001
P30835	ZJDE0001
P3411A	ZJDE0001
P39120	XJDE0001 or XJDE0003
P42642	ZJDE0001
P42995	XJDE0001, XJDE0002
P471411	ZJDE0001
P48210	ZJDE0001
P42642	ZJDE0001

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

Figure 3-21 DREAM Writer Review Workbench screen

```

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

Skip To Form ID. . . _____

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

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

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

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

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

Figure 3-22 DREAM Writer Version Review screen

```

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

Skip to Version. . . _____

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

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

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

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

Figure 3–23 DREAM Writer Review screen

```

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

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

      1 Processing Options

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

```

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

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

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

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

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

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

Go to the Next Phase

Phase Four - Run Special Application Jobs

This chapter contains these topics:

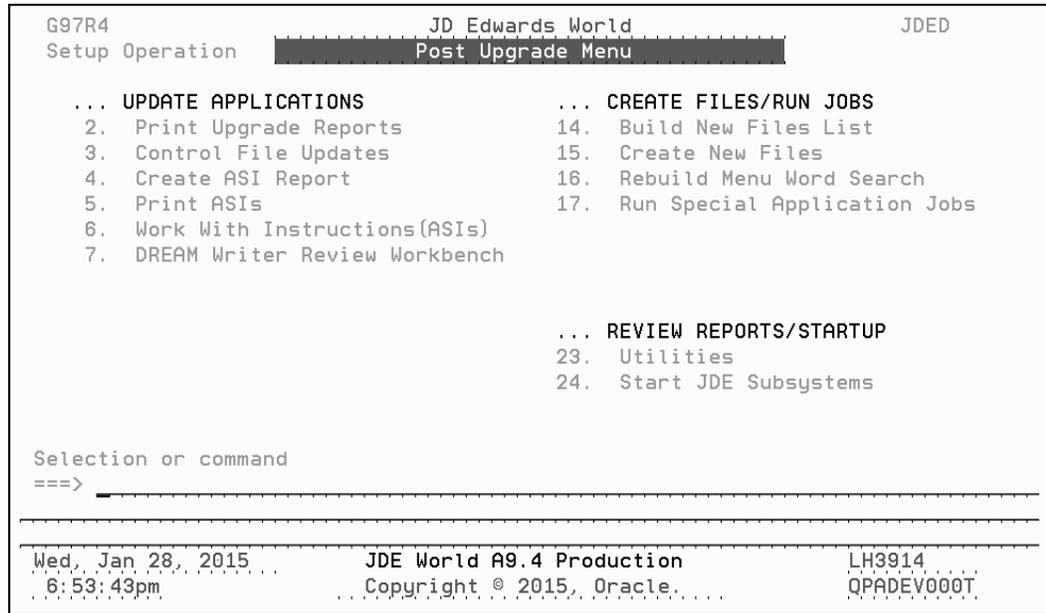
- [Section 4.1, "Sign On as the User ID you entered during the OUI process,"](#)
- [Section 4.2, "Access the Post Upgrade Menu,"](#)
- [Section 4.3, "Rebuild Menu Word Search,"](#)
- [Section 4.4, "Run Special Application Jobs,"](#)
- [Section 4.5, "Extensibility Merge,"](#)
- [Section 4.6, "Activate Triggers,"](#)
- [Section 4.7, "Rebuild DD/VO."](#)
- [Section 4.8, "Only if You Use a Comma for the Decimal Character."](#)

4.1 Sign On as the User ID you entered during the OUI process

4.2 Access the Post Upgrade Menu

From any JD Edwards World menu, enter G97R4.

Figure 4–1 Post Upgrade Menu screen



4.3 Rebuild Menu Word Search

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

The job submits to batch.

4.4 Run Special Application Jobs

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

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

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

The A9.4 Special Jobs Menu appears.

Figure 4-2 A9.4 Special Application Jobs screen

```

G97R9                      JD Edwards World                      JDED
Setup Operation             A9.4 Special Application Jobs

1. Upgrade from A7.3
2. Upgrade from A8.1
3. Upgrade from A9.1
4. Upgrade from A9.2
5. Upgrade from A9.3

Selection or command
===>

-----
Wed, Jan 28, 2015          JDE World A9.4 Production          LH3914
6:56:28pm                Copyright © 2015, Oracle..... QPADEV000T

```

Each of the selections that appear on this menu access an A9.4 Special Application Jobs menu specific to the release level you are upgrading from.

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

The appropriate A9.4 Special Application Jobs menu appears, as shown in the example below.

Figure 4-3 A9.4 Special Application Jobs menu

```

G97R94                      JD Edwards World                      JDED
Setup Operation             A7.3-A9.4 Special Application Jobs

... UPGRADE FROM A7.3
2. Technical
3. Financials
4. Payroll/Human Resource Mgmt
5. Distribution
6. Manufacturing
7. Brazilian Localizations
8. Argentina Localizations

Selection or command
===>

-----
Wed, Jan 28, 2015          JDE World A9.4 Production          LH3914
6:57:35pm                Copyright © 2015, Oracle..... QPADEV000T

```

- Required jobs are listed by product group. To display the jobs for a particular product group, select the appropriate product group from the Special Application Jobs menu.
- Run the jobs for each product group you are using.

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

5. Notes for Special Jobs:

- For menu G97U64, option 18 MUST be executed before option 3. See Document ID 1585393.1 for more information.
- For A73, G97U34 option 13 can be ignored if you ran the options on menu G97U141. For A81, G97U32 option 7 can be ignored if you ran the options on menu G97U121.
- Option 3 on menus G97U74 and G97U72 require the A7.3 or A8.1DREAM Writer files.

WARNING: If you are upgrading from A8.1, A9.1, or A9.2, and you will use A9.4 Financials or Purchase Cards, you must ensure that the J0911QD2 job is run and completed normally before entering any data.

The job is on menus G97U12 (option 21), G97U16 (option 18), or G97U15 (option 8). Use the menu that corresponds to the upgrade you are performing. This job will left justify any of the 8 character Enhanced Subledgers for Enhanced Subledger Types A, E, O, W, L, I, or J that were entered in the G/L file (F0911) for release A8.1, A9.1 or A9.2 OR to the Purchase Card Transaction file (F01P111) for release A9.1 or A9.2.

If you have any questions, please contact the Oracle Support Services World Financials group.

4.5 Extensibility Merge

If you are upgrading from A9.3.1 or higher and are using the extensibility feature, you will need to run the Extensibility Data Merge on menu G98X31, option 3.

Based on the results on the R97820 report which is produced, you may also need to run the Extensibility Source Merge on menu G98X31, option 7.

Review the helps for both programs before running them. Always run the Extensibility Source Merge in PROOF mode first.

4.6 Activate Triggers

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

4.7 Rebuild DD/VO

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

Figure 4–4 Rebuild DD/VO screen

```

0021JQ                               Rebuild DD/VO

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

      Data Dict. Library (F9200) . . . _____
      Vocab. Ovr File Library(F9220) . _____
      Dream Writer File Library(F98301) _____

      Warning: This procedure should not be run when application
      users are signed on. All Videos and Reports will be impacted.

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

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

4.8 Only if You Use a Comma for the Decimal Character

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

Go to the Next Phase

Phase Five - Post Upgrade Tasks

This chapter contains these topics:

- Section 5.1, "Overview,"
- Section 5.2, "Access the Post Upgrade Menu,"
- Section 5.3, "Work with 'Z' Libraries,"
- Section 5.4, "Sign on as JDEINSTAL to Access the Software Upgrade Menu,"
- Section 5.5, "Print the Conversion Status Report,"
- Section 5.6, "Review the Upgrade Reports,"
- Section 5.7, "Sign off as JDEINSTAL,"
- Section 5.8, "Sign On as the Security Administrator User ID You Entered During the OUI Process,"
- Section 5.9, "End the JD Edwards World Monitor,"
- Section 5.10, "JDEORACLE Library,"
- Section 5.11, "Test in the Alternate Environment,"

5.1 Overview

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

5.2 Access the Post Upgrade Menu

From any JD Edwards World menu, enter G97R4.

5.3 Work with 'Z' Libraries

The file conversion work libraries are named 'Zlibrary' where 'library' is the name of the data library in your upgrade plan. You must display your 'Z' libraries. You must delete all empty 'Z' libraries.

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

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

2. From the Upgrade Utilities menu (G97R42), select Work with 'Z' Libraries.
3. In the Library field on the Work with 'Z' Libraries screen, enter Z*. The 'Z' libraries are listed.
4. To view the contents of a library, enter a 5 (Display) in the Opt field next to the library name.
5. If the library is empty, from the Work with 'Z' Libraries screen, enter 4 (Delete) in the option field next to the library.

5.4 Sign on as JDEINSTAL to Access the Software Upgrade Menu

Figure 5–1 Software Upgrade Menu screen

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

5.5 Print the Conversion Status Report

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

1. From the Software Upgrade Menu (A97JDE), select Conversion Status Report.
The Version Selection screen appears for form ID P972612.
2. In the O (Option) field next to version ZJDE0001, enter 3 (Add).
3. Press Enter until the Data Selection screen appears.
4. In the Value field for Plan Name, type the name of the upgrade plan that defines the environment for which you want to run the report.
5. Press Enter until the Version Selection screen appears again.
6. In the O (Option) field next to the version you created, enter 1 (Run).
7. When the job finishes, print the report.

5.6 Review the Upgrade Reports

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

5.7 Sign off as JDEINSTAL

5.8 Sign On as the Security Administrator User ID You Entered During the OUI Process

5.9 End the JD Edwards World Monitor

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

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

1. From the Post Upgrade Menu (G97R4), select Utilities.
2. From the Upgrade Utilities menu (G97R42), select End JD Edwards World Monitor.

5.10 JDEORACLE Library

The authority for a new object created by a program when users are signed into the A9.4 environment is based on the referenced object in the JDEORACLE library.

The Security Administrator can create new objects in the JDEORACLE library. The new objects will be the name of the library where the object type will be created.

This can be done via the following command:

```
CRTDUPOBJ OBJ(DEFAULT) FROMLIB(JDEORACLE) OBJTYPE(ObjType)
NEWOBJ(LibName)
```

Where Libname is the name of the library where the ObjType will be created.

You can also change the authority on the new object as follows:

```
RVKOBJAUT OBJ(JDEORACLE/LibName) OBJTYPE(ObjType) USER(*ALL)
AUT(*ALL)
```

```
GRTOBJAUT OBJ(JDEORACLE/LibName) OBJTYPE(ObjType) USER(XXXX)
```

Where XXXX becomes the Owner of the object.

If there are no specific entries in library JDEORACLE for your libraries, the DEFAULT objects will be referenced when objects are created.

5.11 Test in the Alternate Environment

Caution: JD Edwards World A9.4 is delivered in a “locked down” state, meaning that the default for all major security types is “NO ACCESS”. Before users can begin using the A9.4 environment, YOU MUST TAKE ACTION UNLESS you are upgrading from A9.3 to A9.4. Access to most system resources must be specifically granted in the security setup. To get users up and running in the A9.4 test environment, you can set up security records that emulate the old program behavior of granting access by default. Usually this can be done by entering a record for user *PUBLIC which grants access to *ALL resources. Once you are familiar with how A9.4 security works, and you are ready to set up security appropriately, you should then add appropriate security records for individual users or groups and remove security records which grant *PUBLIC / *ALL (default) access.

Refer to the *JD Edwards World Technical Foundation Guide* the online helps for options 14 through 23 on menu G9401 and Doc ID 1460223.1.

For existing users who will access the A94 test environment and lower release environments, you will need to change their IBM profile to call J98INITA from the A94 alternate object library.

Customers using the HR Monitor need to go to menu G08H4 option 2. Place a 'C' in the Action Code field and press Enter. The Master File in Library field should be updated to the library where the F060116 file resides.

You can operate your alternate environment at release level A9.4. JD Edwards World recommends that you test the performance of the environment against your data files, and train your users at the new release. When you are satisfied with its performance, you are ready to use it to upgrade your production environment, which is described in the next phase.

6

Phase Six - Upgrade the Production Environment

This chapter contains these topics:

- Section 6.1, "Overview,"
- Section 6.2, "Pre-Upgrade Application and Technical Instructions for the A7.3, A8.1, A9.1, A9.2, or A9.3 Production Environment,"
- Section 6.3, "Delete Files,"
- Section 6.4, "Sign on as JDEINSTAL to Access the Software Upgrade Menu,"
- Section 6.5, "Start the Upgrade and Track Progress,"
- Section 6.6, "Sign On as the Security Administrator User ID You Entered During the OUI Process,"
- Section 6.7, "Change the Security Administrator and JDE User Profiles,"
- Section 6.8, "Rename the Production JDF Libraries,"
- Section 6.9, "Rename the Alternate JDF Libraries,"
- Section 6.10, "Sign On to the Production Environment,"
- Section 6.11, "Start JD Edwards World Subsystems,"
- Section 6.12, "End the JD Edwards World Monitor,"
- Section 6.13, "Activate Triggers,"
- Section 6.14, "Update the Library Entries in Software Versions Repository,"
- Section 6.15, "User Profiles."

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

6.1 Overview

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

6.2 Pre-Upgrade Application and Technical Instructions for the A7.3, A8.1, A9.1, A9.2, or A9.3 Production Environment

6.2.1 Payroll - A7.3 Customer

For release A9.4, for customers upgrading from A7.3, the upgrade process moves all user-defined codes and data dictionary items associated with the previous Payroll system (06) to the Enhanced Payroll system (07). Review customized User Defined Codes and Data Dictionary items as they will also be moved to system code 07.

Some A7.3 customers have an entry for User Defined Codes 07/BC, 07/DB, 07/DM, 07/GR, 07/PC, 07/PF, 07/PG, 07/SC, 07/SG, 07/ST, or 07/WP. These values and the UDC Code Type (F5 from the UDC screen) need to be deleted in order to bring over the values correctly. If you have entries for any of these User-defined Codes, you must delete them now. Use option 3 on menu G90 to view User Defined Codes.

6.2.2 Run Integrity Reports

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

6.2.3 Accounts Payable

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

6.2.4 Contract Billing and Service Billing

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

6.2.5 Check for DDM Files

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

6.2.6 IBM Journaling

IBM Journaling must be turned off on files that are part of the upgrade plan before you start the A9.4 upgrade.

6.2.7 Database Audit Manager and Other Triggers

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

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

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

6.3 Delete Files

- CRTLIB templib
- DLTF FILE(dtalib/F74R0430L*) where dtalib is your data library
- DLTF FILE(dtalib/F74R0430).
- DLTF FILE(dtalib/F74R0433)
- CRTDUPOBJ OBJ(F74R0411) FROMLIB(dtalib) OBJTYPE(*FILE) TOLIB(templib) DATA(*YES)
- DLTF FILE(dtalib/F74R0411)
- CRTDUPOBJ OBJ(F74SC165) FROMLIB(dtalib) OBJTYPE(*FILE) TOLIB(templib) DATA(*YES)
- DLTF FILE(dtalib/F74SC165)
- CRTDUPOBJ OBJ(F76B620) FROMLIB(dtalib) OBJTYPE(*FILE) TOLIB(templib) DATA(*YES)
- DLTF FILE(dtalib/F76B620L*)
- DLTF FILE(dtalib/F76B620)

6.4 Sign on as JDEINSTAL to Access the Software Upgrade Menu

Figure 6–1 Software Upgrade Menu screen

```

A97JDE                               JD Edwards World                               JDEWDS1
                                     Software Upgrade Menu

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

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

      New Installations
11. World Express Install

90. Signoff

Selection or command
===> _____

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

```

6.4.1 Set Up an Upgrade Plan for the Production Data Libraries

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

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

- Your Libraries for this plan screen should look similar to the one below, which is based on the ZJDE_ALT model. Change the library names for library types DTA, COM, and SEC to match the libraries in your production environment. For instance, type the name of the common library that is in your production environment in the Library Name field for library type COM. The library names may not be the same as the ones shown on the screen below. The JDF, OBJ., and SRC libraries for the plan are the A9.4 libraries from your alternate environment.

Figure 6–2 Libraries for This Plan screen

```

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

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

Specify all libraries for the plan that contain J.D. Edwards
files and programs.  Exclude IBM libraries such as QGPL and QTEMP.
Specify current software release level and the release to upgrade to.
    Current JDE Release Level. . . . . A73
    New JDE Release Level. . . . . A94
    Production LSF Library . . . . . JDFOBJ
    Install Source Library . . . . . 0 (1=Yes, 0=No)
    Install Object/Data Libraries. . . 0

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

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

- The Install Source Library and Install Object/Data Libraries fields must be set to 0.
- On the Production LSF Library line, specify the OBJ library name from your plan (JDFOBJALT).

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 Reinstall Language Exception window appears. Enter the correct CCSID.

- Verify the library names on the Merge Information screen. JD Edwards World recommends that you do not change the merge modes.
- The Data Dictionary Field Ownership screen must be the same as your alternate environment report R96004.
- Run the Upgrade Planner Validation Report (R96004YR) to validate this upgrade plan. Be sure that your plan does not have errors or duplicate files before you continue to the next item. Use *ALT for the 4th processing option.

6.4.2 Stop JD Edwards World Subsystems

6.4.3 Sleeper (required)

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

6.4.4 Order Processing (If Installed)

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

6.4.5 Human Resources (If Installed)

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

6.4.6 Back Up Libraries

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

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

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

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

6.5 Start the Upgrade and Track Progress

6.5.1 Start the Upgrade

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

2. Press F13 to clear all of these messages.
3. From the Software Upgrade Menu (A97 JDE), select Start the Upgrade.

Figure 6-3 JDE Upgrade Command screen

```

JDE Upgrade Command (JDEUPGRADE)

Type choices, press Enter.

Upgrade Type . . . . . > _____ *PTF, *INSTALL, *REINSTALL...
Upgrade Plan Name . . . . . > _____ From Upgrade Planner
      + for more values _____
Source Media . . . . . > _____ Device Name, *SAVF, *DISK
Current JDE Release Level . . . . . > _____ From Upgrade Planner
New JDE Release Level . . . . . > _____ From Upgrade Planner
Run Validator Program . . . . . 1 1=Yes, 0=No
Restore SQL *SAVF . . . . . 0 1=Yes,0=No
Hold on job Queue . . . . . 0 1=Hold on Jobq,0=Do not hold

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

4. In the Upgrade Type field, enter *ALT.
5. In the Plan Name field, type the name of the upgrade plan that defines the environment you want to upgrade.

MULTI-PLANS: If you are upgrading more than one environment (multiple plans), enter a plus character (+) in the second Plan Name field, and then enter the additional plans in the fields provided.
6. In the Source Media field, type *DISK.
7. In the Current JD Edwards World Release Level field, type the current JD Edwards World software release level of the environment you want to upgrade.

This release level must match the current JD Edwards World release level specified in the upgrade plan.
8. In the New JD Edwards World Release Level field, type A94.

This release level must match the new JD Edwards World release level specified in the upgrade plan.
9. Leave the default values in the Run Validator Program and Restore SQL *SAVF fields. Press Enter.
10. Leave the default value in the Hold on Job Queue field.
11. After you verify the information, press Enter.

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

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

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

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

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

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

6.5.2 Inquire on File Conversion Status

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

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

6.5.3 Change the QJDF Data Area in JDFOBJALT

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

```
CHGDTAARA DTAARA(JDFOBJALT/QJDF (181 10)) VALUE('XXXX')
```

where XXXX is the name of your production library containing your security files.

6.6 Sign On as the Security Administrator User ID You Entered During the OUI Process

6.6.1 Create New Files

See [Section 3.5, "Create New Files."](#) You must create new files in the common and data libraries in your production environment.

6.6.2 Update Your Applications

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

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

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

Control File Changes Monitored

If you monitored control file changes, you can copy most of the control files from the alternate common library (ALTCOM) to the common or data library in your production environment. If a file can be copied, you do not have to reapply manual changes.

The control files that can be copied are as follows:

Control File Type	Control File
Automatic Accounting Instructions	F0012
Menu	F0082, F00821, F0083, F009190, F009690, F009790
Data Dictionary	F9200, F9202, F9203, F9204, F9207, F9210, F9816, F98163
DREAM Writer	F9836, F98361, F983610, F9837
User Defined Codes	F0004, F0004D, F0005, F0005D
Software Versions Repository	F9801, F9802
Vocabulary Overrides	F9220, F9601, F9601D, F9611, F9620, F9621
World Writer	F8201, F8202, F82013, F82100, F82101, F82102, F82103, F82104, F82105, F82106, F82107, F82108, F82100E, F82109, F9401
	Note: World Writer and Automatic Accounting Instructions are not considered control files but are files that can be copied from the alternate environment if changes were monitored.

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

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

Note: The Next Number file (F0002) cannot be copied. You must apply the manual changes to the newly converted file in the common library of your production environment. Any A9.4 Special Instructions ASIs also need to be completed.

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

For system 12 - F12603 through F12609

For system 83 - F8303 through F8309

You must have used the dual maintenance method of monitoring DREAM Writer, FASTR, and STAR changes as described in Phase One. See the IMPORTANT NOTE in [Section 1.1.5, "Monitor Changes to JD Edwards World Control Files."](#)

Control File Changes not Monitored

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

To apply the manual changes, sign on as the Security Administrator you entered during the OUI process.

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

- If you were unable to copy the Menu files, run the Menu Comparison Report, print the Menu Merge reports (R97883A, R97883B) and update menus if required.
- If you were unable to copy the User Defined Code (UDC) files, print, or view online the UDC report (R987241) and perform the manual changes.
- If you were unable to copy the Automatic Accounting Instruction (AAI) file, print the AAI report (R98727) and perform the manual changes.
- If you were unable to copy the Data Dictionary (DD) files and had some of the values on the Data Dictionary Field Ownership screen of the upgrade plan set to C, use the Data Dictionary workbench to apply changes.
- Print and perform the any ASIs pertaining to the control files you could not copy.

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

Also, review the CRTDUPOBJ section of the ASI for UDC 97/NF.

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

Copy Security Files

If you would like to copy the security setup from your A9.4 test environment, you may copy the following security files using the CPYF *REPLACE command:

- F00823 Advanced Menu Security
- F0003 Action Code Security

- F0003T Action Code Security Tag file
- F0103 Name Search Type Security
- F0024 Batch Approval/Post
- F9425 Report Writer Form Security
- F00168 Generic Text Security
- F9612 Function Key Security
- F00042 User Defined Code Security
- F00FP Fast Path Security
- F0001 - Business Unit Security
- F0034 - Company File Security

You will want to carefully look at each file before you copy the data from the test to the production library as you will be replacing production data.

Copy Role-Based Security Files

If you have set up Role-Based security in your A9.3 test environment, you may copy the following files from your A9.4 test security library to your A9.4 production security library using the CPYF *REPLACE command:

- F00926 - Role
- F009261 - Role/User
- F009262 - Role/Group
- F009264 - Role/Library List

6.6.3 Run Special Application Jobs, and Perform Post Upgrade Tasks, Upgrade Reports

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

WARNING: If you are upgrading from A8.1, A9.1, or A9.2, and you will use A9.4 Financials or Purchase Cards, you must ensure that the J0911QD2 job is run and completed normally before entering any data.

The job is on menus G97U12 (option 21), G97U16 (option 18), or G97U15 (option 8). Use the menu that corresponds to the upgrade you are performing. This job will left justify any of the 8 character Enhanced Subledgers for Enhanced Subledger Types A, E, O, W, L, I, or J that were entered in the G/L file (F0911) for release A8.1, A9.1 or A9.2 OR to the Purchase Card Transaction file (F01P111) for release A9.1 or A9.2.

If you have any questions, please contact the Oracle Support Services World Financials group.

- If you are upgrading from A7.3 or A8.1 and you were not able to copy the DREAM Writer files from your test environment to product, you will need to restore a set of your DREAM Writer files to run the Technical P/O Batch Conversion job.
- When the instructions ask for an upgrade plan name, enter the one you used to upgrade your production environment.

- If you made manual changes in the data dictionary, using the Data Dictionary Workbench, run the Rebuild DD/VO from G97R6
- If you made manual changes on menus, run the Rebuild Menu Word Search.
- If you are upgrading from A931 and are using extensibility, follow the Extensibility merge instructions in section 4.

Caution: If you copied the Fast Path Security file (F00FP), you do not need to run the Fast Path Security Conversion job (J00FPC) on the Technical Special Application Jobs menus. If you do, the *ALL value for each user will come from the Fast Path setting in the production F0092 file.

6.6.4 Change the JDEPROD Library List

1. From the System Administration menu (G944), select Library List Revisions.
2. Inquire on the JDEPROD library list. The Description is JDE World A9.4 Production.
3. Change the alternate object and source library names to the production object and source (if you installed source) library names.

6.6.5 Change the JD Edwards World System Values

From the System Administration menu (G944), select JDE System Values.

1. After you read the message screen that appears, press F6 (Execute). The first JD Edwards World System Values screen appears.
2. Verify that the alternate object library (JDFOBJALT) is in the QJDF Library Name field. Press Enter. The second JD Edwards World System. The Values screen appears.
3. In the Source Library field, type the name of the source library in your production environment if you have source code.
4. In the Object Library field, type the name of the object library in your production environment.
5. In the User Profile Library (F0092) field, type the name of the security library in your production environment (where your F0092 file resides).
6. In the Control File Library (F9200, F9220) field, type the name of the library in your production environment where your F9200 and F9220 files reside. Your screen must look similar to the following graphic:

Figure 6–4 JDE System Values screen

98QJDF2		JDE System Values	
System Identification	JDEWDS1		
Source Library	JDFS9193		
Object Library	JDF09193		
User Profile Library (F0092)	DTA91		
Control File Library (F9200, F9220)	JDFD9193		
Software Security Code	_____	Warning Days	010
Software Expiration Date	_____	UBP Audit Flag	-
Software Licensed Users	_____		
Version Prefix	_____		
Region Code	_____		
Video Color Palette (1=SAA 2=JDE)	2		
Menu Date Format	_____		
Menu Time Format (' '=12hr '1'=24hr)	_____		
Menu Display File Vocab Override Key	VOOMENU		
Menu Key - Hidden Selections	ZHIDDEN		
Double-Byte System (1/0)	0	Japanese Date Fmt (1/0)	-
Language	_____	Domestic Language	
Application Override System	_____		
Program To Execute - Following Sign On	_____		
F12=Previous Screen			

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

6.7 Change the Security Administrator and JDE User Profiles

You must change these profiles to call J98INITA from your production object library. From the command entry screen, enter the following command:

CHGUSRPRF USRPRF(XXX) INLPGM(JDFOBJ/J98INITA), where XXX is your Security Administrator profile.

CHGUSRPRF USRPRF(JDE) INLPGM(JDFOBJ/J98INITA)

6.8 Rename the Production JDF Libraries

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

JDFOBJ to JDFOBJX

JDFDATA to JDFDATAX

JDFSRC to JDFSRCX (if you have source)

where JDFOBJ is the name of the object library in your production environment, JDFDATA is the name of the JD Edwards World data library, JDFSRC is the name of the source library, and X is 73, 81, 91, 92, or 93 depending on the release level of your production environment before the upgrade.

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

6.9 Rename the Alternate JDF Libraries

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

JDFOBJALT to JDFOBJ

JDFDTAALT to JDFDATA

JDFSRCALT to JDFSRC (if you have source)

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

6.10 Sign On to the Production Environment

Sign on as the Security Administrator user to verify that the rename of the libraries was successful. You are now ready to set up security (if not upgrading from A93) and allow users into the JD Edwards World Software at the A9.4 release level in a live production environment.

6.11 Start JD Edwards World Subsystems

6.11.1 Order Processing (If Installed)

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

6.11.2 Human Resources (If Installed)

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

6.11.3 Start the JD Edwards World Sleeper Subsystem

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

6.12 End the JD Edwards World Monitor

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

1. From the Post Upgrade Menu (G97R4), select Utilities.
2. From the Upgrade Utilities menu (G97R42), select End JD Edwards World Monitor.

6.13 Activate Triggers

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

CALL PGM(JDFOBJ/J98206CV1) to convert the old Database Audit Manager triggers to the new Database Audit Manager named triggers. If you removed other triggers as a result of the PRTRGPGM report or the query report produced by Step 2 of the upgrade, you can reattach those triggers to your files in the production environment. A9.4 is not coexistent with EnterpriseOne, only add back triggers needed to run A9.4 software.

6.14 Update the Library Entries in Software Versions Repository

If you installed source, you need to get the library entries (F9802 file) for the Software Versions Repository screen updated to reflect your production library names. Refer to Doc ID 627330.1 on My Oracle Support for instructions to populate the F9802 file.

6.15 User Profiles

You will need to change the object library on the IBM profile to the production (A9.4) object library for all users who will need to access the A9.4 production environment and any earlier World release environments.

Control File Dependencies

This appendix contains the topic:

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

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

A.1 Control File Sets

A.1.1 User Security

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

A.1.2 DREAM Writer

- F98301 DREAM Writer Master Parameter
- F98302 DREAM Writer Processing Options (Language Preference)
- F98303 DREAM Writer Version Headings (Language Preference)
- F9831 DREAM Writer Values Parameter

F98310 DREAM Writer Values Parameter
F98311 DREAM Writer Headings File
F98312 DREAM Writer Printer Overrides
F81900 DREAM Writer Performance Statistics Master
F81901 DREAM Writer Statistics Detail
F81902 DREAM Writer Statistics Detail Accumulator

A.1.3 Data Dictionary

If you are currently at release A7.3:

F9200 Data Item Master
F9201 Data Field Specs
F9202 Data Field Display Text
F9203 Data Item Alpha Descriptions
F9204 Data Item Aliases
F9205 Data Dictionary - Error Message Program ID
F9206 Alternate User Defined Codes Tag File
F9816 Data Dictionary Generic Text File
F98163 Data Dictionary Generic Text Key Index File

If you currently are on release A8.1 or above:

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

A.1.4 Vocabulary Overrides/Function Keys

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

A.1.5 User Defined Codes

F0004 User Defined Code Types

F0004D User Defined Code Types (Alternate Language Descriptions)

F0005 User Defined Codes

F0005D User Defined Codes (Alternate Language Descriptions)

A.1.6 Software Versions Repository

F9801 Software Versions Repository Master

F98012 SVR Member Category Codes

F98013 SVR Member Parm/Key List

F9802 Software Versions Repository Detail

A.1.7 Generic Message/Rates Files

F0019 Generic Message/Rates Types

F00191 Generic Message Rates

F00192 Generic Message Detail

A.1.8 Menu Files

F0082 Menu Master File

F00821 Menu Selections

F0083 Menu Text Overrides

F009190 Word Search Occurrences Master

F009690 Word Search Master

F009790 Word Search Verbs

A.1.9 Generic Text Files

F0016 Generic Text File

F00161 Generic Text Window Definition File

F00162 Generic Text Key Definition File

F00163 Generic Text Key Index File

F00164 Generic Text Key Index File (120 Character)

Upgrade Planner Screens

This appendix contains these topics:

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

This appendix describes the upgrade planner screens and their fields.

B.1 Plan the Upgrade Screen

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

Figure B-1 Plan the Upgrade screen

```
960099                               Plan the Upgrade

Action Code. . . I

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

Enter the name of a Plan.

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

We recommend you review the following:

      ZJDE      - Simple production plan
      ZJDE_ALT - Alternate upgrade plan

      ** Press F5 key to enter Upgrade Data **

F3=Exit      F5=Plan Data
```

To display a list of all available plans, move the cursor to the Plan Name field on the Plan the Upgrade screen, and press F1. You cannot modify or delete the models (ZJDE-type plans).

The following table explains the fields on this screen.

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

To Add an Upgrade Plan

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

1. In the Action Code field, type A (Add).
2. In the Plan Name field, type a name for the new upgrade plan.
3. In the Description field, enter a description for the new upgrade plan.
4. Inquire on the new upgrade plan.

B.2 Libraries for this Plan Screen

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

Figure B-2 Libraries for This Plan screen

```

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

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

Specify all libraries for the plan that contain J.D. Edwards
files and programs.  Exclude IBM libraries such as QGPL and QTEMP.
Specify current software release level and the release to upgrade to.
      Current JDE Release Level. . . . .  A73
      New JDE Release Level. . . . .    A94
      Production LSF Library . . . . .  JDFOBJ
      Install Source Library . . . . .  1 (1=Yes, 0=No)
      Install Object/Data Libraries. . .  1

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

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

```

The following table explains the fields on this screen.

Field	Explanation
Current JD Edwards World Release Level	Specify the current JD Edwards World software release level of the environment you want to upgrade. Note: Do not type more than three characters in this field.
New JD Edwards World Release Level	Specify the JD Edwards World software release level to which you want to upgrade your environment (for example, A93).
Production LSF Library	Specify the Production Object library name containing the F99LSF file.
Install Source Library	Specify whether you want the JD Edwards World source code library (usually JDFSRC) restored. Valid values are: 0 – Do not restore the source code library. 1 – Restore the source code library.
Install Object/Data Libraries	Specify whether you want the JD Edwards World object and data libraries (usually JDFOBJ and JDFDATA) restored. Valid values are: 0 – Do not restore the object and data libraries. 1 – Restore the object and data libraries.

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

B.3 Merge Information Screen

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

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

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

Figure B-3 Merge Information screen

```

96001E                               Plan the Upgrade                               Screen 2 of 3
                                     Merge Information

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

Specify Merge Modes And Library Names.

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

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

```

The following table explains the fields on this screen.

Field	Explanation
Data Dictionary Merge	<p>Specify the mode in which you want the merge to run.</p> <p>In final mode, the merge adds new data items and updates fields in your existing data items, some of which are based on your values on the Data Dictionary field ownership screen of your upgrade plan. Display decimals are not changed. The merge also produces a report that lists updates made to your data items.</p> <p>0 – Do not run the merge (No Merge). 2 – Run the merge and generate the reports (Final). 3 – Run the language upgrade (Replace).</p> <p>This is valid for language upgrades only. For upgrade, it will run as 2 (Final).</p> <p>Note: To update the data dictionary glossary, see Section B.5, "Advanced Options Screen" in this appendix.</p>
Data Dictionary Library Name	<p>Specify the name of the production library that contains your Data Dictionary file (F9200).</p>
Vocab. Overrides Merge	<p>Specify the mode in which you want the merge to run.</p> <p>In final mode, the merge adds new vocabulary override fields and records, deletes obsolete VTX fields, and updates text for existing records, but not VTX (video and report soft-coded text) fields that have a Y in the override field. The merge also produces two reports: one that lists updates made to your records and another that lists VTX fields not updated because each has a Y in the override field.</p> <p>0 – Do not run the merge (No Merge). 2 – Run the merge and generate the reports (Final). 3 – Run the language upgrade (Replace). This is valid for language upgrades only. For upgrades, it will run as 2 (Final).</p>

Field	Explanation
Vocabulary Overrides Library Name	Specify the name of the production library that contains your Vocabulary Overrides file (F9220).
DREAM Writer Merge	<p>Specify the mode in which you want the merge to run.</p> <p>In final mode, the merge adds new form IDs and their associated versions, replaces processing option text, adds new ZJDE and XJDE versions, replaces existing XJDE versions, and updates the open query file option fields if your fields are different than those in JDFDATA.</p> <p>For upgrades, the merge updates data selection, data sequencing, and processing options wherever it is possible, flags some items for your review, and does not produce a report.</p> <p>0 – Do not run the merge (No Merge).</p> <p>2 – Run the merge (Final).</p> <p>3 – Run the language upgrade (Replace). This is valid for language upgrades only. For upgrades, it will run as 2 (Final).</p>
DREAM Writer Library Name	Specify the name of the production library that contains your DREAM Writer file (F98301).
Menu Master Merge	<p>Specify the mode in which you want the merge to run.</p> <p>For upgrades:</p> <p>In final mode, the merge adds new menus and lists them on the Menu Additions Report.</p> <p>It may produce a Menu Merge Exceptions report, which lists new and obsolete programs and other menu conditions which may need to be reviewed.</p> <p>Options are removed from menus if the program is obsolete. Options are changed on a menu if there is a replacement program for the menu. The F9806 file controls this.</p> <p>New menu options are added to existing menus. If a slot is open, the new option is added there. If that selection is taken, then the menu merge starts with selection 24 and works backwards to add new options.</p> <p>The menu comparison is run as part of Phase 3 to provide the necessary information to complete the manual changes for menus. An option is available with the menu comparison to overlay 'G' menus from JDFDATA.</p> <p>0 – Do not run the merge (No Merge).</p> <p>2 – Update existing menus and generate the reports.</p> <p>3 – For language upgrades, replace all JD Edwards World menus.</p>
Menu Master Library Name	Specify the name of the production library that contains your Menus file (F0082).

Field	Explanation
User Defined Codes Merge	<p>Specify the mode in which you want the merge to run.</p> <p>In final mode, the merge adds new user defined code tables and their values for all system codes, and adds new user defined code values for existing tables located in system codes 84 through 99 and in system code 00, record type IO. It adds selected new values to existing tables. The merge also produces a report that lists updates made to your tables and codes.</p> <p>0 – Do not run the merge (No Merge).</p> <p>2 – Run the merge and generate the report (Final).</p> <p>3 – Run the language upgrade (Replace). This is valid for language upgrades only. For upgrades, it will run as 2 (Final).</p> <p>Note: To update the user defined code detail text, see Section B.5, "Advanced Options Screen" in this appendix.</p>
User Defined Codes Library Name	Specify the name of the production library that contains your User Defined Codes files (F0004 and F0005).
Generic Message/Rates Merge	<p>Specify the mode in which you want the merge to run. The merge operates the same as the user-defined codes merge except that it includes the free form text associated with the rate on the message.</p> <p>In final mode, the merge adds new user defined code tables and their values for all system codes, and adds new user defined code values for existing tables located in system codes 80 through 99. It does not add new values for existing tables located in system codes 00 through 79. The merge also produces a report that lists updates made to your tables and codes.</p> <p>0 – Do not run the merge (No Merge).</p> <p>2 – Run the merge and generate the report (Final).</p>
Generic Message/Rates Library Name	Specify the name of the production library that contains your Generic Message/Rates files (F0019, F00191, and F00192).
Help Master Merge	<p>Specify the mode in which you want the merge to run.</p> <p>This merge runs in replace mode only, which replaces changed help text and adds new help text. It does not replace your entire help file. The merge does not produce a report.</p> <p>0 – Do not run the merge (No Merge).</p> <p>3 – Run the merge in replace mode (Replace).</p>
Help Master Library Name	Specify the name of the production library that contains your Help file (F98HELP).
Software Repository Merge	<p>Specify the mode in which you want the merge to run.</p> <p>0 – Do not run the merge (No Merge).</p> <p>2 – Run the merge and generate the report (Final).</p>
Software Repository Library Name	Specify the name of the production library that contains your Software Versions Repository files (F9801 and F9802).
Generic Text Keys Merge	<p>Specify the mode in which you want the merge to run.</p> <p>The merge does not produce a report.</p> <p>0 – Do not run the merge (No Merge).</p> <p>2 – Run the merge (Final).</p>

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

B.4 Printer Information Screen

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

Figure B-4 Printer Information screen

```

96001D                               Plan the Upgrade
                                      Printer Information

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

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

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

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

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

F12 or Enter=Previous                F24=More Keys
    
```

The following table explains the fields on this screen.

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

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

B.5 Advanced Options Screen

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

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

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

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

Figure B-5 Advanced Options screen

```

96001A          Plan the Upgrade
                Advanced Options

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

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

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

Hold on Print Queue. . . . . 0

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

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

F12 Or Enter=Previous                                F24=More Keys

```

The following table explains the fields on this screen.

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

Field	Explanation
Convert Data to Upper Case	Specify whether you want to convert all display data to uppercase characters for double-byte purposes. Valid values are: 0 – Do not convert data to uppercase characters. 1 – Convert data to uppercase characters.

Figure B-6 Data Dictionary Field Ownership screen

```

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

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

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

                                F12=Previous Screen   F24=Move Keys
    
```

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

File Conversions

This appendix contains these topics:

- [Section C.1, "Scheduler Conversions,"](#)
- [Section C.2, "Main Conversions,"](#)
- [Section C.3, "JDEINSTAL Subsystem,"](#)
- [Section C.4, "JDEINSTAL Job Queues,"](#)
- [Section C.5, "File Conversion Job Queues,"](#)
- [Section C.6, "Disk Utilization - Work With Disk Status,"](#)
- [Section C.7, "CPU Utilization - Work With System Status,"](#)
- [Section C.8, "Summary."](#)

There are two types of conversions for A9.4:

- Scheduler Conversions
- Main File Conversions

C.1 Scheduler Conversions

There are two reasons for scheduler conversions.

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

C.1.1 Scheduler Types

There are four types of scheduler conversions:

1. Control File Conversions (CTF) are for files that are the technical foundation of JD Edwards World software such as Data Dictionary and Menus. These conversions occur first in the process as other conversions and the control file merges are dependent on the files already being converted.
2. Application Control File Conversions (ACF) are for files considered application control files such as Company Constants (F0010). Some other application conversion programs (BIG, LTL) are dependent on these files already being converted.

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

C.2 Main Conversions

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

- record format
- file keys
- select/omit criteria

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

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

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

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

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

C.3 JDEINSTAL Subsystem

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

JDEINSTAL Subsystem

Maximum Active Jobs in subsystem - 20

Storage Pool ID: 1

Storage Size: *BASE

JdeMonitor Job

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

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

C.4 JDEINSTAL Job Queues

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

C.5 File Conversion Job Queues

Job queues JDEBIGQ, JDELTLQ, and JDEFILCNV are referred to as the "data pumps" - they convert the physical structure of the physical files. JDEBIGQ and JDELTLQ run scheduler conversion jobs which normally manipulate the files data as part of the file

conversion process. Job queue JDEFILCNV is where physical files are converted that require no additional data manipulation or processing.

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

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

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

C.6 Disk Utilization - Work With Disk Status

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

Work with Disk Status										JDEWDS1
Elapsed time: 00:00:00										12/27/11 08:01:39
Unit	Type	Size (M)	% Used	I/O Rqs	Request Size (K)	Read Rqs	Write Rqs	Read (K)	Write (K)	% Busy
1	433C	111669	68.9	.0	.0	.0	.0	.0	.0	0
2	433C	111669	65.0	.0	.0	.0	.0	.0	.0	0
3	433C	111669	65.0	.0	.0	.0	.0	.0	.0	0
4	433C	111669	65.0	.0	.0	.0	.0	.0	.0	0
5	433C	111669	65.0	.0	.0	.0	.0	.0	.0	0

Bottom

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

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

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

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

MAXACT(2)

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

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

C.7 CPU Utilization - Work With System Status

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

Work with System Status								JDEWDS1	
								12/27/11	08:02:38
% CPU used	:	.1	Auxiliary storage:						
Elapsed time	:	00:00:01	System ASP		558.3 G				
Jobs in system	:	1934	% system ASP used . . .		65.8380				
% perm addresses	:	.018	Total		558.3 G				
% temp addresses	:	.035	Current unprotect used :		3856 M				
			Maximum unprotect . . .		3876 M				
Type changes (if allowed), press Enter.									
System	Pool	Reserved	Max	-----DB-----	---Non-DB---				
Pool	Size (M)	Size (M)	Active	Fault	Pages	Fault	Pages		
1	<u>403.45</u>	134.49	+++++	.0	.0	.9	.9		
2	<u>584.64</u>	2.96	<u>110</u>	.0	.0	.0	.0		
3	<u>20.29</u>	.00	<u>7</u>	.0	.0	.0	.0		
4	<u>1021.35</u>	.00	<u>22</u>	.0	.0	2.7	2.7		
Bottom									
Command									
===>									
F3=Exit F4=Prompt F5=Refresh F9=Retrieve F10=Restart F12=Cancel									
F19=Extended system status F24=More keys									

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

C.8 Summary

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

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

Change Decimal Character

This appendix contains the topic:

- [Section D.1, "Change the Decimal Character for the Category Table of Contents."](#)

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

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

D.1 Change the Decimal Character for the Category Table of Contents

1. In the Selection field at the bottom of your screen, enter DSPSYSVAL QDECFMT. This displays your system's decimal format. If your format is 2, 3, I, or J, your system uses a comma for the decimal character.
2. After you determine the decimal character your system uses, exit this screen.
3. If your system does not use the comma, skip the following steps.
Continue to the next checklist item.
4. From the Post Upgrade Menu (G97R4), select Control File Updates.
5. From the Control File Updates menu, select Data Dictionary Items.
The Data Dictionary Items screen appears.
6. In the Data Item field, inquire on HELP100A.
The Data Item Glossary Revisions screen appears.
7. In the Action Code field, type C.
8. In the series of numbers displayed as 1.1, 1.2, 1.3, and so on, replace the decimal point (.) with a comma (,). Return to where you left off in Phase Four.

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