JD Edwards EnterpriseOne

Applications Upgrade Guide for IBM i with DB2 for IBM i

9.2

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9.2

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Preface

Welcome to the JD Edwards EnterpriseOne documentation.

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Related Information

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

http://learnjde.com

Conventions

The following text conventions are used in this document:

Convention	Meaning
Bold	Boldface type indicates graphical user interface elements associated with an action or terms defined in text or the glossary.
Italics	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`Monospace`	Monospace type indicates commands within a paragraph, URLs, code examples, text that appears on a screen, or text that you enter.
> Oracle by Example	Indicates a link to an Oracle by Example (OBE). OBEs provide hands-on, step- by-step instructions, including screen captures that guide you through a process using your own environment. Access to OBEs requires a valid Oracle account.

1 Understanding JD Edwards EnterpriseOne

Understanding This Guide

This guide is designed to direct you through a basic *JD Edwards EnterpriseOne* upgrade including the Traditional and Simplified Upgrades. It is not a substitute for the database administration manuals provided by your Relational Database Management System (RDBMS) vendor, the network administration manuals provided by your network vendor, or the installation and configuration manuals for third-party products used with *JD Edwards EnterpriseOne* .

Tip: All links in this guide are "live" (clickable) in the HTML version of this document.

This guide is designed for management information system (MIS) managers and installers. It outlines the procedures for upgrading to *Release 9.2* . To successfully follow these procedures you must understand:

- Hardware and software requirements
- Database setup and management
- Enterprise platforms and operating systems

At a minimum, review these guides before beginning:

- *JD Edwards EnterpriseOne Tools Foundation Guide*
- *JD Edwards EnterpriseOne Server Manager Installation Guide*
- *JD Edwards EnterpriseOne Server Manager Guide*
- *JD Edwards EnterpriseOne System Administration Guide*
- *JD Edwards EnterpriseOne Tools Runtime Administration Guide*
- *JD Edwards EnterpriseOne Tools Package Management Guide*
- *JD Edwards EnterpriseOne Tools Server and Workstation Administration Guide*
- *JD Edwards EnterpriseOne Tools Security Administration Guide*

In addition, it is recommended to complete the database product courses that your database vendors provide.

Below are links to the documentation libraries on the Oracle Technology Network (OTN) for the three major categories of JD Edwards EnterpriseOne:

- **JD Edwards EnterpriseOne Applications Documentation Release 9.2**

  `http://docs.oracle.com/cd/E64610_01/index.htm`
- **JD Edwards EnterpriseOne Tools Documentation Release 9.2**

  `http://docs.oracle.com/cd/E53430_01/index.htm`
- **JD Edwards EnterpriseOne Install and Upgrade Documentation Release 9.2**

  `http://docs.oracle.com/cd/E61420_01/index.htm`

Understanding Upgrade Types

Beginning with Tools Release 9.2, two types of Upgrades are available:

- *Traditional Upgrade*
- *Simplified Upgrade*

Note: Unless specifically noted, all topics and procedures in this Upgrade guide are applicable to both the Traditional and Simplified Upgrade types.

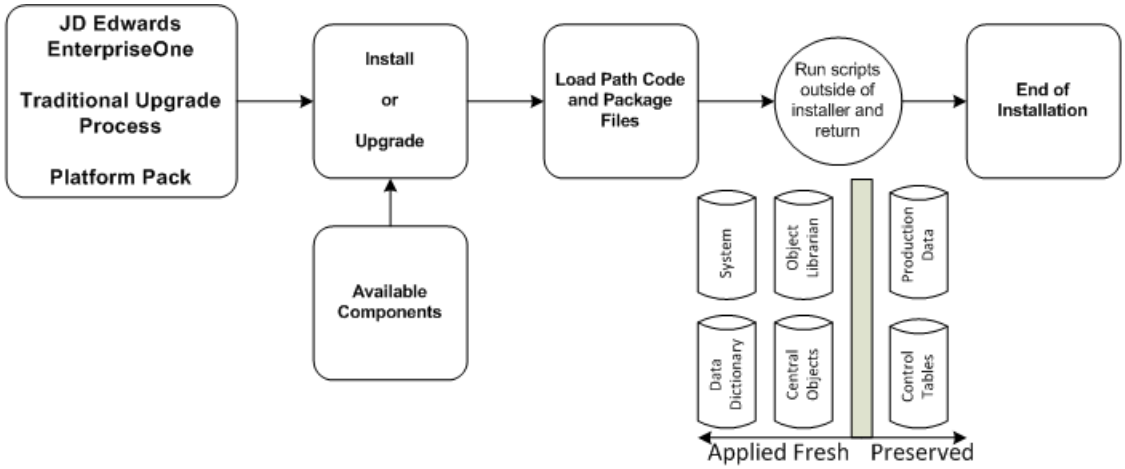
CAUTION: Regardless of which upgrade type you choose, the end result of either upgrade process is identical in terms of the functional code base applicable to JD Edwards EnterpriseOne Applications Release 9.2.

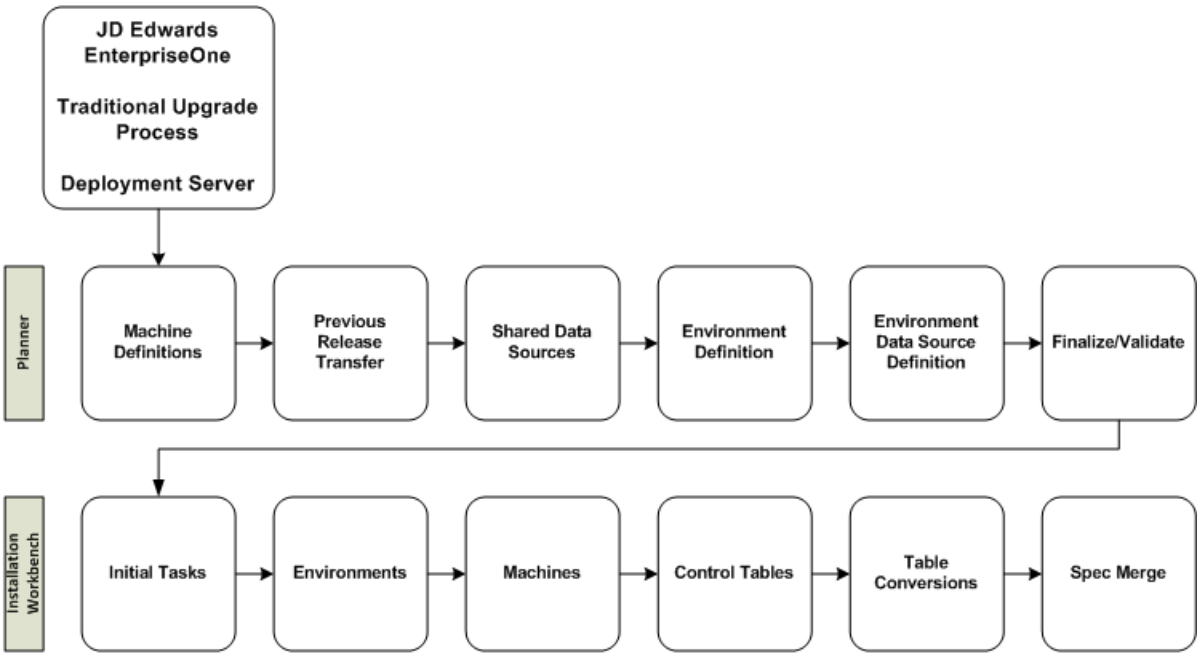
Traditional Upgrade

The Traditional Upgrade can be used to upgrade from all supported Applications Releases prior to 9.2. For a list of supported releases, refer to the section of this chapter entitled: *Release History*.

This type of upgrade performs a comprehensive method of updating the JD Edwards EnterpriseOne code set because it replaces the entire set of JD Edwards EnterpriseOne objects. All code objects that have been customized must be retrofitted with these changes.

The following diagram illustrates the process flow for the Traditional Upgrade.





Security

Media Objects Data Dictionary

System Tables

Release Master

Configure CNC (Data Sources)

OCMs

Create new tables and indexes

Create Server Maps for:

- **OCMs**
- **Data Sources**
- **Jobs Tables**

Conversions In Place for:

- **Data Dictionary**
- **User Defined Codes (UDCs)**
- **Favorites**
- **Tasks**

Conversions In Place for Business Data

Custom and new objects are merged

Replace Applications and Merge UBEs Merges

- **Object Librarian**
- **Versions**
- **Object Specifications**

Any changes to standard JDE objects replaced by the Upgrade must be manually retrofitted

Simplified Upgrade

Beginning with Applications Release 9.2, a Simplified Upgrade is available. Whereas a Traditional Upgrade replaces all JD Edwards EnterpriseOne objects, the Simplified Upgrade process identifies and replaces only specific standard JD Edwards EnterpriseOne objects that have changed between from Applications Release 9.0 Update 2 or Release 9.1 to Applications Release 9.2. The Simplified Upgrade does not support upgrades from releases prior to 9.0 Update 2.

The concept is to simplify the upgrade in terms of lessening the requirement to retrofit custom changes. The Simplified Upgrade process applies code and objects in a net-change format that preservers unaffected modified objects. This is accomplished using a manifest that identifies the objects that were changed by JD Edwards software development in the from release and the to release.

> **Tip:** This toolset is also provided in Tools Releases prior to Tools Release 9.2. Therefore you can run the Impact Analyzer from Releases 9.0 and 9.1 before you install Release 9.2. The enhanced Impact Analyzer is delivered with the Planner Upgrade for Releases 9.0 and 9.1. You can download the manifest from the Update Center.

You can run the Impact Analysis Report (R96711) to determine the impact on all objects in your environment. You should run this report against the release to be upgraded (that is, either environments for Applications Release 9.0.2 or 9.1).

This report:

- Identifies new objects to be loaded into system
- Identifies existing objects that will be replaced
- Identifies obsoleted objects that will be deleted.
- Allows objects to be filtered by system code
- Analyzes overall impact and advises the most efficient upgrade type (Traditional or Simplified).

See Also

The Impact Analysis Report is described in the chapter of this guide entitled: *Before You Begin the Installation or Upgrade*.

Following is a summary of the toolset enhancements that support the Simplified Upgrade type:

- Platform Pack updated to support an option for Simplified Upgrade

  Using the Simplified Upgrade option, the Platform Pack does not install Central Objects for JD Edwards EnterpriseOne and the data source definition is updated accordingly. The Platform Pack process also changes the release level identifiers and the table and index generation definitions for Central Objects tables.
- Planner updated to support a plan type for Simplified Upgrade
- Environment Workbench additionally runs an Object Librarian copy and a pathcode copy to support the Simplified Upgrade process.
- Spec Merge is modified to merge designated manifest pristine objects to the existing target pathcode.

- Spec Merge adds a summary report that outlines objects to be replaced and which of those objects have been modified and will therefore require modifications to be retrofitted.

  > **CAUTION: Best Practice.** Because the Spec Merge function of the Simplified Upgrade replaces objects that have been changed for 9.2 by JD Edwards in the previous Central Objects in the pathcode to be upgraded, before you upgrade an environment you should make sure you have a copy of the modified object, which could be in another Central Objects, or saved in OMW. In this manner you can overlay your customized object in Central Objects without having to retrofit the modifications.

- The Planner validates existing translations are kept intact and updates their definitions accordingly.

  > **Note:** The language pack still needs to be run to fully implement languages.

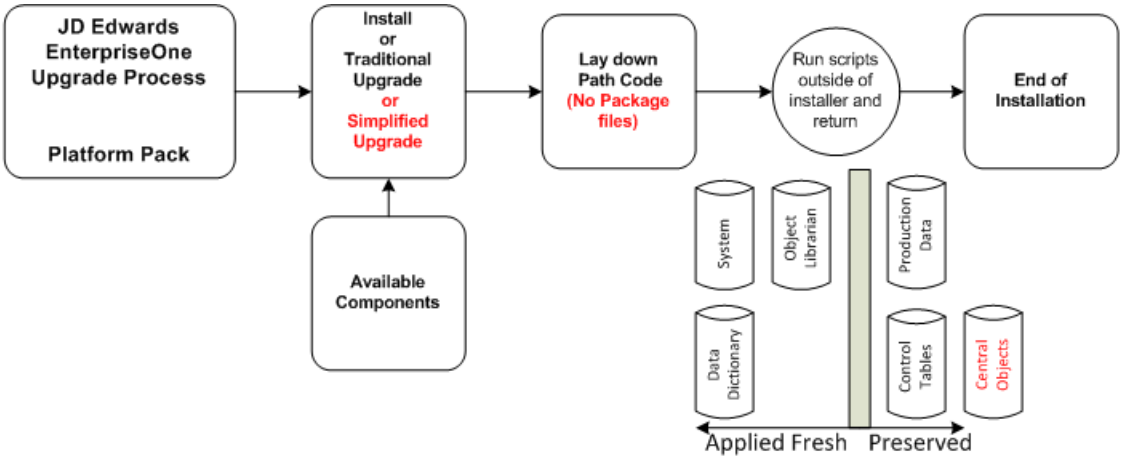
- The Summary Report at the end of the Workbench, which is similar to the ESU summary report, is modified as follows:

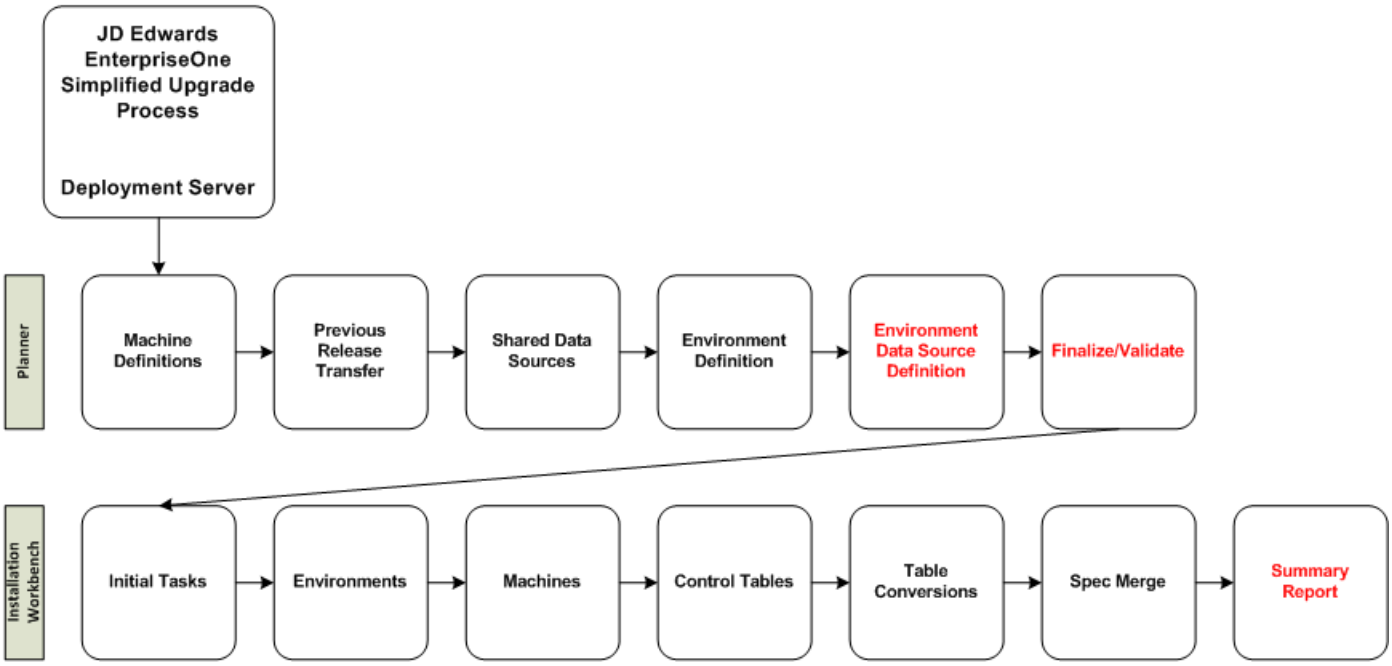
  a. Lists objects that have been replaced or merged with customer modifications.
  b. Lists objects that have been added.
  c. Lists objects that have been deleted.
  d. Lists objects that have been replaced.
  e. Instructs users that it is recommended that they run the Custom Object Analysis (COA) tool to compare their upgraded environment against the previously saved application environment in order to outline spec differences.

Regarding logic, when the Simplified Upgrade option is chosen the JD Edwards EnterpriseOne Platform Pack Installer does not deliver Central Objects. The existing Central Objects are preserved and the data sources are configured to point to those path codes, which can be either from JD Edwards Release 9.0 Update 2 or 9.1.

Regarding the database, for a Simplified Upgrade the *JD Edwards EnterpriseOne* Platform Pack Installer performs the same as a Traditional Upgrade in terms of delivering the entire database for the for Pristine environment. However, unlike the Traditional Upgrade, the Simplified Upgrade does not deliver Central Objects for other environments.

The following diagram illustrates the process flow for the Simplified Upgrade where the items highlighted in red indicate specific areas of changed relative to the Traditional Upgrade.





- Security
- MO
- DD
- System Tables
- Release Master
- Configure CNC (Data Sources)

- OCMs
- Load Data
- Create New Tables/Indexes
- Path Code Copy
- Object Librarian Merge

Server Map Created

- OCMs
- Data Sources
- Jobs Tables

- Control Table Merges
- DD
- UDC
- Favorites
- Report Director Templates
- Tips of the day
- Tasks
- Service Constants
- XMLP
- RPDF
- Workflow
- User overrides

- Conversions In Place – Business Data
- UDOs

- Pristine/Updated Objects Merged Into Customers
- Replace Apps and Merge UBEs
- Driven by Manifest
- Merges
- OL
- Versions
- Object Specifications
- Changes to JDE Objects = Manually Retrofit
- Add status to report – objects deleted (Obsolete)

Similar to ESU Summary Report

Objects Updated with Customization

Understanding the Installation and Upgrade Process

This documentation explains the process used to upgrade *Release 9.2* software which consists of these steps:

- Install the Deployment Server (see *Concurrent Installation* below for concurrent operations)
- Install the Platform Pack (see *Concurrent Installation* below for concurrent operations)
- Set up the installation plan by running Installation Planner
- Run the Installation Workbench
- Install the *HTML Web Server*

> **Note:** A *JD Edwards EnterpriseOne HTML Web Server* is mandatory to run web-enabled *JD Edwards EnterpriseOne* applications, which includes all end-user applications and selected tools applications. This guide only describes the definition of the *HTML Web Server* in regards to the Installation Planner and the Installation Workbench. The installation of the *HTML Web Server* itself is not covered by this guide. Separate guides describe the separate installation process for the *HTML Web Server* on the supported platforms using Server Manager. Topics relating to the HTML Web Server other than installation using Server Manager are covered in platform-specific reference guides. Such topics include the installation and configuration of the underlying application servers. Refer to these JD Edwards EnterpriseOne guides which are available on the JD Edwards EnterpriseOne Documentation library. For *Applications Release 9.2 and Tools Release 9.2.x* , refer to this library on the Oracle Technology Network at this link: `http://docs.oracle.com/cd/E61420_01/index.htm`
>
> - *Server Manager Installation Guide*
> - *Server Manager Guide*
> - *HTML Web Server Reference Guide for WebSphere on IBM i*

- Install the Development Clients for developers and system administrators

Concurrent Installation

You can concurrently install the Deployment Server, the Platform Pack, and the *HTML Web Server* assuming the installation programs are run on different machines. This can decrease the overall time it takes to complete the upgrade.

Recommended Configurations

You can set up your *Release 9.2* configuration in many ways. You should follow the typical setup and naming conventions whenever possible, unless there is a strong business case that supports the need to change.

See Also

Typical Customer Configuration in the *JD Edwards EnterpriseOne System Administration Guide* for more information about the typical customer configuration provided with *Release 9.2* .

> **Note:** *JD Edwards EnterpriseOne Release 9.2* does not support coexistence. If you have ever had JD Edwards World installed, you will need to perform the steps in *JD Edwards EnterpriseOne Ending Coexistence Guide* before starting your *Release 9.2* upgrade.

This section discusses:

- *What Custom Modifications an Upgrade Preserves and Replaces*
- *Understanding the Deployment Server Installation*
- *Understanding the Platform Pack Installation*
- *Understanding the Installation Planner*
- *Understanding Installation Workbench*
- *Understanding the Development Client Installation*

What Custom Modifications an Upgrade Preserves and Replaces

If custom modifications are required, follow the rules listed below to ensure a smooth and predictable upgrade. These rules describe which modifications the upgrade process preserves and which modifications the upgrade replaces.

Preserve means during an upgrade the custom modifications are not lost during the automatic and visual merges of the new applications shipped with the upgrade. If there is a direct conflict between your specifications and those in the upgrade, the upgrade process uses yours. When there is no direct conflict between the two, the upgrade process merges the two specifications.

Replace means the upgrade does not merge your custom modifications into the new release. Custom modifications must be redone after the upgrade is completed.

Customization Considerations

If possible, transfer all modifications to one pathcode. Do this only after testing and approving all modifications or if the modifications are only in development. Having only one environment to upgrade significantly shortens the process.

Refer to the *JD Edwards EnterpriseOne Tools Package Management Guide* for more information about custom modifications and how they are affected by the upgrade process.

Interactive Application Rules

Do not delete controls, grid columns, or hyperitems on existing software applications; instead, hide or disable them. *JD Edwards EnterpriseOne* might use these for calculations or as variables. Deleting them might disable major functionality. Modified *JD Edwards EnterpriseOne* applications are ignored by batch merge. You must use Visual FDA / Merge to retrofit all changes.

An upgrade preserves custom changes to:

- New applications (batch merge)
- New objects on existing forms using Visual FDA Merge, including:
    - New hyperitems
    - New controls
    - New grid columns
    - Any style changes, such as fonts and colors
- Any code-generator overrides
- Data dictionary overrides
- Location and size changes for controls

- Sequence changes for tabs or columns

Custom forms on existing *JD Edwards EnterpriseOne* applications are not preserved. A set of visual merge tools have been provided to assist in retrofitting custom modifications.

Refer to the *JD Edwards EnterpriseOne Tools Development Tools: Form Design Aid Guide* for more information on Visual Merge Tools and FDA Compare.

Report Rules

These rules apply to report specifications that were created using Report Design Aid (all are batch merges).

An upgrade preserves these changes:

- New reports
- New elements to existing *JD Edwards EnterpriseOne* reports, including:
  - Constants
  - Alpha variables
  - Numeric variables
  - Data variables
  - Runtime variables
  - Database variables
  - Dictionary variables
  - Any style changes, such as fonts and colors
- Location and size changes for objects
- Data dictionary overrides

Custom sections in existing *JD Edwards EnterpriseOne* reports are not preserved.

Application Text Changes

An upgrade does **not** automatically preserve overrides done in Form Design Aid or Interactive Vocabulary Overrides. They must be retrofit using FDA Visual Merge.

UBE Text Changes

An upgrade automatically preserves overrides done in Report Design Aid or Batch Vocabulary Overrides.

Table Specification Rules

An upgrade merges your custom table specifications from one release level to the next.

An upgrade preserves these changes:

- New tables
- New indexes on *JD Edwards EnterpriseOne* tables

An upgrade replaces columns added or removed from existing *JD Edwards EnterpriseOne* tables, including changing field length, field type, and decimal position.

Instead of adding a new column to an existing table, use a tag file with product codes 55 through 59. For custom tag files, be aware of data item changes in the data dictionary. From one release to the next, *JD Edwards EnterpriseOne*

might change certain data item attributes, such as data item size, which can affect data integrity and how data is stored in the database.

For this reason, use the Table Conversion tool to convert the custom tag file data to the new release level. For base files, the upgrade process takes care of the data dictionary changes by upgrading the previous database. An upgrade preserves custom indices over the custom tag files.

Control Table Rules

An upgrade merges your control table data, not *JD Edwards EnterpriseOne* tables, from one release level to the next using the Change Table process as the basis to do the data merge.

An upgrade preserves these changes:

- **Data dictionary custom changes.**
  These include such as changes to row, column, and glossary text. The upgrade process uses your data dictionary as the base.
- **User-defined codes.**
  The upgrade process merges any new hard-coded values. (These values are system 90 and above, and H90 and above.)
- **Solution Explorer Tasks.**
  Consider these affects on the customization of Solution Explorer Tasks:
  a. During an upgrade, your custom changes on any *JD Edwards EnterpriseOne* base task overrides any new changes from *JD Edwards EnterpriseOne* .
  b. If any new custom task (TASKNM) has been added that conflicts with a new *JD Edwards EnterpriseOne* base task, the custom task will be replaced.

Business View Rules

Do not remove columns from existing business views. Changing business views that applications use can cause unpredictable results when running the application. Hide columns at the application design level using either Form Design Aid or Report Design. Performance is not gained by deleting a few columns from a business view.

An upgrade preserves these changes:

- New custom business views.
- New columns or joins to the existing business views.

An upgrade replaces columns removed from business views.

Rules for Event Rules

An upgrade preserves these changes:

- For APPL, all retrofitting is done using the Visual FDA and ER Merge tools.
- Custom event rules on a new custom control field.
- For reports, tables, and business function events that do not have any event rules attached to the same event.
- An upgrade replaces modifications to applications, reports, tables, and business functions events that have existing event rules.
  Use the Visual ER tools to restore custom event rules.

Data Structure Rules

An upgrade preserves all of these custom data structures:

- Forms
- Processing options
- Reports
- Business functions
- Generic text

An upgrade replaces all custom modifications to *JD Edwards EnterpriseOne* data structures. No changes to *JD Edwards EnterpriseOne* structures are preserved.

Business Function Rules

For any newly created custom business functions, create a new parent DLL directory to store them.

An upgrade preserves new custom business function objects, including custom BSSV objects.

An upgrade replaces modifications made to existing business functions and any business functions added to existing business function objects. Refer to the *JD Edwards EnterpriseOne Tools Development Tools: APIs and Business Functions Guide* .

Versions

For XJDE versions, nothing carries forward. The user JDE owns specifications and processing option data.

For ZJDE versions, specifications do not carry forward while processing option data changes do carry forward.

All other custom versions should have processing option data and specifications carried forward.

Understanding the Deployment Server Installation

The Deployment Server is the focus of the *Release 9.2* upgrade process. The upgrade program for the Deployment Server copies the *Release 9.2* software from the installation images to the Deployment Server. From the Deployment Server, the *Release 9.2* software is distributed to one or more Enterprise Servers and Development Clients.

The Deployment Server installation program updates the Microsoft Windows registry with information about the *Release 9.2* installation and languages, if applicable.

New for Tools and Applications Releases for 9.2, the Deployment Server installer no longer delivers any standard full packages (for example, DV920FA). Further the install no longer attaches and renames tables for package specs. However, the installer still delivers the `PACKAGE\data` and `PACKAGE\datacomp` directories.

Understanding the Platform Pack Installation

Rather than transferring all the software from the Deployment Server, the Platform Pack installs the code and database directly to the Enterprise Server. This more direct installation method increases performance during this part of the process. It is especially beneficial in situations in which the Enterprise Server is connected to the Deployment Server using a wide area network (WAN). Since the Deployment Server and Platform Pack have separate Installers, they can

be running concurrently which decreases the overall installation time (assuming the Installers are run on different machines).

However, new for Tools and Application Releases for 9.2, customers must build a full package after the Platform Pack completes. Customers will not be able to build an update package out of the box. This is due to changes in Server Only Package Build, which was introduced with Tools Release 9.1.5).

> **Note:** Although the Platform Pack will no longer deliver packages, it still delivers the Package Repository and the package definition records because these are needed in order to run services. The Platform Pack will not deliver the source and include files (for example, obj and lib) for the package. The directories are delivered in the path code on the Deployment Server, just not as a package.

Understanding the Installation Planner

Installation Planner is an application that runs on the Deployment Server. It is used to configure the environments for all machines within the enterprise. It also is a system administration tool that stores all information about the installation plan in a set of preloaded tables in the Planner data source. The purpose of the Installation Planner is to help you set up the installation plan using step-by-step options.

This section discusses these topics:

- *Managed Processes*
- *Data Sources*
- *Environment Setup*
- *Control Table Merges*
- *Table Conversions*
- *Specification Table Merges*
- *Package Workbench*

Managed Processes

Installation Planner manages these processes:

- Language setup
- Location setup
- Deployment Server Setup
- Enterprise Server setup
- HTML Web Server setup
- Additional server setup

  This includes setup to servers such as a Database Server.
- Data source setup

  This includes setup for both Enterprise Server-specific and shared environment data sources.

Data Sources

> **Note:** Languages are installed using the Installation Planner from the Language installation image. To install additional languages, you perform the language-specific procedures after you have executed the initial installation described in this guide. For additional details, refer to *Creating a Language Only Installation Plan*.

Some data sources remain the same between releases:

- Business data
- Control tables

Other data sources are release specific:

- System and data dictionary
- Server map
  The server map is machine-specific and release-specific if separate environments are maintained.

Environment Setup

This includes all environments for a typical customer configuration, and creation of a new environment, such as PD920. This process ensures that the Object Configuration Manager (OCM) mappings are correct and the new environments point to the correct path codes. This could include creating custom environments and path codes.

Control Table Merges

The control table planner program offers these merges for customers upgrading to *Release 9.2* from a previous release:

- Data Dictionary Merge (R989200P).
- User Defined Code Merge (R9600042).
- Solution Explorer Merge (R9690002).
- Favorites Merge (R96911002).
- Report Director Templates Merge (R96914002).
- Tips of the Day Merge (R96915002).
- XMLP Merge (R96956002)
- RPDF Merge (R96956202)
- Workflow Merge (R98800)
- User Override Merge (R9898950)

Table Conversions

You can convert all tables for which *JD Edwards EnterpriseOne* has made database changes, including technical, specification, and vertical tables.

Specification Table Merges

You can use the upgrade process to merge custom modifications with *JD Edwards EnterpriseOne* applications. A single batch application merges changes to these objects:

- Tables
- Business views

- Data structures (only new are added)
- Interactive applications (no changes are merge, just new objects are added)
- Batch applications
- Business functions (only new are added)

See *Modifications Rules* in the *JD Edwards EnterpriseOne Tools Package Management Guide* for information about changes that merge or overlay former data.

Package Workbench

You use Installation Planner to perform on environment-level operations that deal primarily with processing activity on the Enterprise Server platforms. You use it to set up user profiles and Development Client installations after installing the Enterprise Server.

Understanding Installation Workbench

Installation Workbench runs the plan created during Installation Planner. It functions as a central point for all the processes required to install environments. Some of the processes that install environments might require procedures to be performed manually. However, Installation Workbench assures that procedures are performed in the proper order, and insulates you as much as possible from platform-specific environment setup.

Understanding the Development Client Installation

The JD Edwards EnterpriseOne Development Client contains components that run as standard Microsoft Windows applications (for example, Solution Explorer, Forms Design Aid (FDA), and Report Design Aid (RDA)) and components that run in a web browser.

Note: This document uses the following terminology when discussing JD Edwards EnterpriseOne clients:

- Web Client

  Components that run in a web browser.

- Development Client

  Composed of standard Windows components and Web Client.

The Web Client part of the Development Client runs inside an Application Server. The supported Application Servers are:

- Oracle WebLogic Server (WLS)
- IBM WebSphere Application Server (WAS) Express or WebSphere Application Server for Developers.

For Oracle WebLogic Servers, you should install the supported version as indicated by the Certifications for the Development Client. The version of the Web Client that is installed on WLS is WLSH4A.

For WebSphere Application Servers, you can choose to use WAS Express or WAS for Developers as the Application Server for the EnterpriseOne Web Client. Both products are similar; either one may be manually installed before installing the Web Client for WAS. Whereas WAS Express requires a licensing fee to IBM, WAS for Developers is free.

The version of the Web Client that is installed on supported application servers is referred to by either of these names:

- HTML for Applications
- WLS4A (WebLogic Server for Applications)
- H4Ax (where the "x" denotes the version of WAS Express or WAS for Developers; for example, for WAS 8.5 the version of the Web Client is H4A85).

Note: Beginning with JD Edwards EnterpriseOne Tools Release 9.2, the Oracle Application Server (OAS) and the companion OH4A web development feature are not supported. They are functionally replaced by the Oracle WebLogic Server (WLS) and the companion WLSH4A web development feature, respectively.

The *Development Client Installation Guide* describes how to install Web Clients for both Application Servers: WLSH4A and H4Ax. In addition, it covers the installation of Oracle WebLogic and WAS Express or WAS for Developers.

The first time setup of the JD Edwards EnterpriseOne Development Client installer and installation package on an EnterpriseOne Deployment Server is described in a separate guide entitled: *JD Edwards EnterpriseOne Deployment Server Reference Guide*. This setup on the Deployment Server must be done before a user can install a JD Edwards EnterpriseOne Development Client. The installation package specifies the components to install and may or may not include the Web Client feature for Oracle WebLogic or IBM WebSphere.

Considering Additional Factors

This section discusses:

- *Accessing Certifications*
- *Understanding Machine Names*
- *Accessing Performance Tuning and White Papers*
- *Using Support*
- *Understanding Documentation Conventions*

Accessing Certifications

Customers must conform to the supported platforms for the release as detailed in the JD Edwards EnterpriseOne Certifications. In addition, JD Edwards EnterpriseOne may integrate, interface, or work in conjunction with other Oracle products. Refer to the following link for cross-reference material in the Program Documentation for Program prerequisites and version cross-reference documents to assure compatibility of various Oracle products.

http:\\www.oracle.com\corporate\contracts\index.html

Additional information is contained in this document on My Oracle Support (***https://support.oracle.com***):

745831.1 (JD Edwards EnterpriseOne Minimum Technical Requirements Reference)

https://support.oracle.com/epmos/faces/DocumentDisplay?id=745831.1

Understanding Machine Names

Due to underlying requirements in the machine name tables, you must ensure that all machines names in the JD Edwards EnterpriseOne environment conform to specific rules. Whenever you manually enter a machine name in JD Edwards EnterpriseOne, or whenever a machine name is programmatically determined, it is important to note that the machine name:

- Is case-sensitive
- Cannot exceed 15 characters
- Must be alphanumeric only and cannot contain any special characters, such as underscores or hyphens

Any machine whose name does not conform to these rules cannot be used in the JD Edwards EnterpriseOne environment.

Accessing IBMi Performance Tuning and White Papers

In order to optimize performance for JD Edwards EnterpriseOne customers running on *IBM i* , users should be aware of the IBM tuning guide (White Paper WP101777):

IBM Power Systems with *IBM i* Performance and Tuning Tips for Oracle's JD Edwards EnterpriseOne 9.0

http://www-03.ibm.com/support/techdocs/atsmastr.nsf/WebIndex/WP101777

On this IBM Techdocs (Technical Sales Library) web site, you can locate the above referenced White Paper and other documents by searching for **EnterpriseOne** and the EnterpriseOne release number (for example, 9.1 or 9.2):

http://www-03.ibm.com/support/techdocs/atsmastr.nsf/Web/TechDocs

Using Support

Use **My Oracle Support** to access customer support functions and information including issues, Software Action Requests (SARs), and to access the Oracle JD Edwards Update Center. Through the Update Center, you can research and download Service Packs, Electronic Software Updates (ESUs), view SARs and objects, and documentation.

If you need further assistance with *Release 9.2* upgrade, contact Oracle customer support by phone, fax, or e-mail. For questions about operating systems, databases, and other software products, contact the appropriate vendor.

Understanding Documentation Conventions

This section explains these typographic and design conventions used throughout this documentation.

- *Documentation Updates*
- *Tips*
- *Fonts and Type Styles*

Documentation Updates

The Oracle Technology Network for JD Edwards Documentation always contains the most recent documentation, which may include document updates and other information about installing and upgrade *JD Edwards EnterpriseOne* . You can use this link to access the Oracle Technology Network for JD Edwards Documentation:

http://www.oracle.com/technetwork/documentation/jdedent-098169.html

Tips

This documentation contains tips containing information that can make the *JD Edwards EnterpriseOne* setup process easier. Tips information is helpful but optional.

Fonts and Type Styles

Special fonts and type styles are used in this guide. Nearly all of the commands in this guide are case sensitive. Enter them exactly as written. In addition, all of the commands described illustrate the recommended directory structure. If your machine's directory structure is different, modify the commands to match your directory structure.

Italic type style designates variables used in the guide. For example, for the variable *deployment_server* in a command, substitute the actual name of your *Deployment Server*. Also, the names of other *JD Edwards EnterpriseOne* guides are in italic type style. For example, *JD Edwards EnterpriseOne Tools Package Management Guide* .

Courier font indicates explicit file names, commands, or other information that must be typed into the system. For example, a common file name used by *JD Edwards EnterpriseOne* is an initialization file called the ***jde.ini*** .

Working With the Customer Checklist

The *Release 9.2* support structure consists of components such as databases, operating systems, and hardware. To upgrade *Release 9.2* successfully, set up the support structure before starting the installation process.

The tasks in this section are designed to prepare the customer's system for the installation process. Some of the tasks, such as checking that the appropriate hardware and software are available, can take some time to complete. Other tasks are quick and easy.

This checklist helps to organize the required preparation:

- Review *Environments Overview*.
- If the installation involves a secondary language, review *Language Process Overview* in this chapter.
- Assess the network.
- Back up the Deployment Server.
- Back up the existing language package directory (for language clients only).
- Back up the Enterprise Server.
- Back up the databases.
- Prepare the prototype environment.
- Prepare the development environment.
- Check media object queues.
- Check modification and merge flags.

- Prepare environments for upgrade.
- Refresh the business data (optional).
- Refresh the control tables.
- Verify custom changes in master control tables.
- Verify third-party hardware and software.
- Verify that the Deployment Server hardware and software meet minimum technical requirements.
- Verify that the Enterprise Server hardware and software meet minimum technical requirements.
- Verify that the Development Client hardware and software meet minimum technical requirements.
- Verify that *HTML Web Server* hardware and software meet minimum technical requirements.
- Verify that the Deployment Server disk space meets minimum technical requirements.
- Verify that the Enterprise Server disk space meets minimum technical requirements.

Environments Overview

The *HTML Web Server* (J) environments have the same mappings as the regular environments with the exception of logic, all of which is mapped to run on the Enterprise Server.

Each environment shipped with *Release 9.2* has a specific use. The following sections explain each environment in more detail.

- *Understanding Environments*
- *Planner Environment*
- *Pristine Environment*
- *Deployment Environment*
- *Development Environment*
- *Prototype Environment*
- *Production Environment*
- *Additional Considerations*
- *Release History*

Understanding Environments

The *Release 9.2* software includes several environments that represent the typical customer configuration as defined in the Installation Planner. These environments are preset to make the installation process as easy as possible. This section contains additional information about these environments and their role in the installation and upgrade process.

Follow the setup recommendations and naming standards described in this guide to minimize confusion when communicating with those outside of your implementation team. In addition, future upgrades are simpler if you use *JD Edwards EnterpriseOne* naming conventions. If you customize your configurations during the process, you should change only the descriptions provided with the typical setup.

JD Edwards EnterpriseOne provides the following preset environments:

- Deployment (*DEP920*)

- Planner (*JDEPLAN*)
- Prototype (*PY920*)
- Pristine (*PS920*)
- Development (*DV920*)
- Production (*PD920*)
- HTML Web Environment (all J* environments)

Planner Environment

The software installation and upgrade process includes a planning stage called the planner environment. Using this approach you can define the main components of your software configuration without affecting the production environment.

Every environment must have an associated pathcode and a set of OCM mappings. The planner environment uses a planner pathcode, which is shipped with the software, and a set of OCM mappings, which point to a planner database. All pathcodes share a complete set of runtime central objects on the Deployment Server.

Planner Pathcode

Release 9.2 provides a full set of runtime objects, which are used during the installation process. The software stores these objects on the Deployment Server in the planner directory. The planner pathcode contains the only complete set of runtime central objects on the Deployment Server, which are shared by all pathcodes.

The planner pathcode includes preloaded packages used during the update specification merge process. A package indicates the necessary objects for a Development Client, a point-in-time snapshot of the central objects on the Deployment Server, and where the installation program finds them.

Planner Database

All information created and updated during the planning stage is saved in these Oracle tablespaces:

- JDEPlan920
- JDECTL920
- JDEDD920
- JDSYS920
- JDEVL920
- JDEOL920
- JDEData920

When using the planner environment to change your configuration:

- Planner database tables are updated with the change.
- A plan is defined and run to move the change to the production environment.

When using the deployment or production environment to change your configuration after finishing the process:

- Production environment tables in the System pathcode are updated in real-time.
- Planner database tables are not updated.

For the deployment and production environments, OCM and data source information comes from the planner database.

You should use the production environment system (technical) tables to make changes to environments, pathcodes, packages, and OCM.

Pristine Environment

Use the pristine environment (*PS920*) to test pristine (un-customized) objects with *JD Edwards EnterpriseOne* demonstration data or for training classes. The pristine environment is also used to run Table Conversion processes during an upgrade. This environment is required to compare modified objects to pristine objects. When encountering a software problem that *JD Edwards EnterpriseOne* Global Support cannot duplicate, they will ask you to sign on to the pristine environment to duplicate the problem. Routinely, either monthly or quarterly, refresh the data for this environment from the JDEPLAN environment on the Deployment Server.

You should apply all software updates, ESUs, and Service Packs to the Pristine environment.

Deployment Environment

Use the deployment environment to run package builds on the Deployment Server. The deployment environment uses the planner pathcode and has OCM mappings to the production environment system tables and local data. Only one deployment environment is required because all environments created by the installation process share common data sources.

The deployment environment uses system information, such as environments, packages, and user profiles. The OCM mappings and data source information are supplied by the planner database.

Development Environment

The development environment is for development objects (*DV920* pathcode). Log on to this environment to modify and test objects before transferring them to the prototype environment (*PY920*) pathcode. After transferring the objects into *PY920* , build and install a full or partial prototype package (for example, *PY920FA* or *PY920PA*), and then log on to the prototype environment for additional testing. The Development environment is delivered with *JD Edwards EnterpriseOne* Demonstration data.

Prototype Environment

The prototype environment is the staging environment for production. Constants tables and master tables, such as company constants, fiscal date patterns, and item master are populated with production data during the prototype process. Copy the tables to the production environment before going live.

Production Environment

Production users have a tested and released package on their system. Batch applications can run on the Enterprise Server.

Additional Considerations

Additional considerations include:

- *Cluster Software Options*
- *Web-Based Options*

Cluster Software Options

When using cluster software, additional issues exist that must be taken into consideration before installing *Release 9.2* .

Web-Based Options

The *HTML Web Server* installation enables the use of Web-enabled functions in *Release 9.2* .

See Also

- *HTML Web Server Reference Guide for WebSphere on IBM i*

Release History

This version of *JD Edwards EnterpriseOne* is *Release 9.2* . The following list shows the currently supported previous releases of *JD Edwards EnterpriseOne* :

- Release 9.1
- Release 9.0 / 9.0.2
- *Release 8.12*
- ERP8
- OneWorld Xe

Language Process Overview

There are two methods to install languages:

Method 1 -- You can install languages are installed using the Installation Planner. The Language installation image is required to implement this functionality. If you install additional languages, you will perform the procedures after you have executed the initial installation described in this guide. For additional details, refer to the chapter *Creating a Language-Only Installation Plan* in this guide.

Method 2 -- You can use the latest version of Change Assistant to obtain the languages from the Update Center and automate the steps of Method 1. For additional details, refer to the chapter *Installing Languages Using Change Assistant on JD Edwards EnterpriseOne* in this guide.

This Language Process Overview section is provided in this guide for reference purposes. The language installation process automatically copies the text from a language database to the production *Release 9.2* database and merges the alternate language text with the original English base. These automated processes are described throughout this guide. When installing language for the first time, a language-only plan may be chosen after completing the initial plan.

See Also

- Section 5.4, "Running the Installation Planner for an Upgrade".
- *Creating a Language-Only Installation Plan* for the tasks that must be completed when choosing to install an alternate language after completing the base installation.
- *Installing Languages Using Change Assistant on JD Edwards EnterpriseOne* for an alternate means of installing languages that automates the tasks of using the Installation Planner.

Language Architecture

The software language architecture incorporates multinational language functionality for international customers. The software specifies the language preference for forms and reports. For example, users who share the same environment may want to view the same text in multiple languages, such as French, Spanish, and English. All language text is stored in a central location and deployed to the individual Development Client.

JD Edwards EnterpriseOne provides all software with a base language of English. The package build process enables the building of packages for multiple languages. Multiple languages can be installed using the processes outlined in this guide. Language text is accessed by the language preference code settings in the user profile associated with the alternate language installed.

Base Language

Release 9.2 language support works in conjunction with the English base language. The base release contains English and must be installed before creating custom modifications to include changes or additions to the translated text. All control files must also have an English record prior to adding an alternate language text record.

Alternate Language Components

An alternative language component is not included in this release; you must build the language package.

An alternate language includes major components whereby language text is stored in the Central Objects, System, Control Table, and Data Dictionary data sources. The data is loaded to the Deployment Server during the installation and copied to the Central Objects and the other data sources through the language installation process.

For *Release 9.2* , *JD Edwards EnterpriseOne* is shipped with 21 languages. Single-byte languages run on single-byte or double-byte operating systems, but double-byte languages must run on double-byte operating systems.

Instructions in this guide explain how to set up these features.

See Also

Package Build in the *JD Edwards EnterpriseOne Tools Package Management Guide* for more details on how to build a language package.

Language Preference Codes

The language preference codes are the standard language codes used throughout the software. The Language Preference Code field, located in the *Release 9.2* user profile, determines which language is displayed on forms or reports. All users are assigned a language preference code within the user profile.

A blank language preference code specifies the base language of English. Alternate language records always have a value in the language preference code.

The alternate language text tables contain language preference codes. The tables contain several records for each item, such as a user defined code value as well as possible multiple records for a code value, with each code representing a different language.

If the language preference code does not have a corresponding translated language record, the base English record is the default record.

Certain database tables, such as the Business Unit Master, AAIs, Account Master, and Item Master, also contain the language preference code in an additional description table. This information is not translated in the *JD Edwards EnterpriseOne* demonstration data.

Release 9.2 applications support the use of languages. Refer to the individual applications to set up and use multiple languages.

Database Character Set and Code Page Considerations

Data within a database is defined by a set of parameters. Each character within the database is identified by a specific language preference code value. A collection of characters within a defined database is called a character set or code page. A character set or code page setting is a scheme for encoding character data. Every character is defined by a unique hexadecimal value. These values can change between databases and languages. Every language is represented by at least one character set. Some character sets may contain multiple languages.

For example, the Western European character set contains all characters common to the Western European languages (Aa - Zz) and all special characters unique to specific languages, such as ', ', ', and '. Asian character sets are specific to one language.

The software uses code page conversions to control the consistent or desired display of data. A code page conversion adjusts the hexadecimal values of different characters so that the appearance of text on the desktop is the same with different code pages.

When installing or upgrading the database, set up the code page for the language before loading your language specifics for *Release 9.2* .

See Also

Single-Byte and Double-Byte Considerations to determine the LocalCodeSet and code page settings for your database machine environment.

Unicode

Unicode specifies that the data stored in the data source is in Unicode format. For installs, all data sources default to Unicode.

For *DB2 for IBM i* , the code page is stored at the table level. Therefore, the Unicode attribute must be consistent within a data source (that is, within a library).

Note that the code page still must be set to the correct value even though the data sources may all be Unicode. The Unicode flag only indicates what column type is used to store character data in a Unicode database. For example, for *DB2 for IBM i* , it indicates GRAPHIC\VARGRAPHIC with CCSID 13488 is used. Refer to the following section for the code page settings.

See Also

JD Edwards EnterpriseOne Unicode Data Conversion Guide for information on how to convert data to Unicode.

JD Edwards EnterpriseOne Tools Development Standards for Business Function Programming Guide for information on how to convert Business Functions to support Unicode text strings.

JD Edwards EnterpriseOne Flat File Conversion Guide for information on how to convert Flat Files to Unicode.

Code Page Settings

You should use the code page settings in this guide. The correct code page should be set when the database is created.

DB2 for IBM i Code Page Settings

The *DB2 for IBM i* character set (CCSID) for the database needs to be set correctly depending on the language used as listed in this table:

Tier	Language	*DB2 for IBM i* (CCSID)
1	English	37
1	French	37
1	German	37
1	Italian	37
1	Spanish	37
1	Portuguese	37
1	Japanese	939
2	Danish	37
2	Dutch	37
2	Finnish	37
2	Norwegian	37
2	Swedish	37
2	Korean	933
2	Traditional Chinese	937
2	Simplified Chinese	935

Tier	Language	*DB2 for IBM i* (CCSID)
3	Arabic	N\A
3	Czech	870
3	Hungarian	870
3	Polish	870
3	Greek	875
3	Russian	1025
3	Turkish	1026

Development Clients and Deployment Server

Code page settings for individual languages are specified in Microsoft Windows System locale. Verify that the Deployment Server code page is set correctly prior to upgrade.

National Language Support

National Language Support (NLS) is a set of common standards that enable data to be entered, displayed, stored, retrieved, and printed in multiple languages, in different databases, and on different platforms.

NLS is information that requires the set up of code pages and the `JDE.INI` `jde.ini` for the Enterprise Server and `JDE.INI` for the Development Clients. By using NLS standards, *JD Edwards EnterpriseOne* maintains consistent data within all databases and hardware platforms. The same database can store alternate language text, relying on NLS standards to manage the text storage and retrieval. *JD Edwards EnterpriseOne* uses NLS, on all supported platforms, to interact with any computer system (hardware and software) within your own environment.

For the Development Client to reflect the language installed on the Deployment Server, perform the tasks for both the Enterprise Server and Development Clients to verify and modify the `JDE.INI` `jde.ini` settings. These procedures are described throughout this guide.

Single-Byte and Double-Byte Considerations

Many single-byte languages support either national code pages or multinational code pages. The double-byte languages support specific individual national code pages by language.

Single-byte character sets use a collection of phonetic characters that require one byte to create a single character. Conversely, the double-byte character sets use ideographic characters and require two bytes to create a single character.

Single-byte languages can generally be run on single-byte or double-byte systems. Double-byte languages, such as Japanese, Chinese, and Korean, must run on machines configured to support a double-byte system. For example, a double-byte SQL Server or Oracle database is required for Chinese and Japanese languages.

The software can perform a Query By Example (QBE) on any character. However, when using a double-byte language, this process may not necessarily use an understandable collating sequence, although it can still use QBE for any double-byte column.

The following table shows the languages that the software supports and the LocalCodeSet values set in the ***JDE.INI*** ***jde.ini*** for each platform:

Tier	Language	Language Code	LocalCodeSet Value
1	English	E	US_EBCDIC
1	French	F	US_EBCDIC
1	German	G	US_EBCDIC
1	Italian	I	US_EBCDIC
1	Spanish	S	US_EBCDIC
1	Portuguese	P	US_EBCDIC
1	Japanese	J	JA_EBCDIC
2	Danish	DN	US_EBCDIC
2	Dutch	DU	US_EBCDIC
2	Finnish	FN	US_EBCDIC
2	Norwegian	NO	US_EBCDIC
2	Swedish	W	US_EBCDIC
2	Korean	KO	KO_EBCDIC
2	Traditional Chinese	CT	TC_EBCDIC
2	Simplified Chinese	CS	SC_EBCDIC
3	Arabic	AR	n\a
3	Czech	C	EE_EBCDIC

Tier	Language	Language Code	LocalCodeSet Value
3	Hungarian	HU	EE_EBCDIC
3	Polish	PO	EE_EBCDIC
3	Greek	GR	GR_EBCDIC
3	Russian	RU	RS_EBCDIC
3	Turkish	TR	TK_EBCDIC

Font Considerations

JD Edwards EnterpriseOne includes standard language fonts in a separate file. Some languages (such as double-byte) require special fonts to display and print correctly. The software stores the font settings in files according to language. Individual users can choose fonts by language for forms, grids, and reports.

User Display Preferences

User display preferences are individually defined sets of *Release 9.2* characteristics that are stored in the user profile. The software uses these preferences to determine how menus and forms are presented to individual users and where language is to be used in *Release 9.2* for that user. After user display preferences are set up for a given user, the values remain the same on any Development Client that the user accesses. Refer to the *JD Edwards EnterpriseOne Tools Runtime Administration Guide* for information about modifying user profiles.

2 Before You Begin the Installation or Upgrade

Before You Begin the Installation or Upgrade

You should complete the tasks in this chapter before you begin the actual upgrade process.

Using the Most Appropriate Installation Media

When installing the latest Tools Release, carefully consider which installation media to use.

If you use the original 9.2.0 (2015) installation media, there are multiple steps that you must follow to get the installation current. See the *Implementing 64-bit Processing with JD Edwards EnterpriseOne Learning Path* for details.

> **Note:** The installation should first be done using the latest 32-bit Tools Release and after the installation is complete, you must migrate to 64-bit.

1. Run the latest Planner Update 32-bit.
2. Deploy UN26 or later to your path codes.
3. Upgrade the Deployment Server from 32-bit to 64-bit.
4. Deploy 64-bit Tools Release on Server Manager and Agents, Deployment Server, Enterprise Server, and HTML Server.
5. Run the latest Planner Update 64-bit.
6. Run TL927001 (must be run once on Deployment Server).
7. Build a full package.

> **Note:** If you are using the IBMi Code Current installation media, the only step required is the Full Package build. None of the above steps are necessary.

> **Note:** The IBMi Code Current installation is not geared towards an Upgrade situation. However, if you only lay down the SHARED and PS920 artifacts, you can do a Simplified Upgrade with your Central Objects and Business Data and Control Tables.

Using the Impact Analysis Tool to Determine the Impact of a Simplified Upgrade

Beginning with Release 9.2 you can choose to perform a Traditional Upgrade, which replaces all objects, or to perform a Simplified Upgrade, which only replaces a subset of objects on your existing Applications release. You can use the Impact Analysis Program (P96711) to create an Impact Analysis Report (R96711) to get a comprehensive analysis that

details the impact of a Simplified Upgrade. For a description of the two upgrade processes, refer to the section of this guide entitled: *Understanding Upgrade Types*.

Note: The following are important points to consider regarding the Impact Analysis Tool (P96711):

- Should be run against the source release environment. That is, you should run it against the environment that is being upgraded to Release 9.2; not against the 9.2 environment itself.
- Is delivered in the latest Planner release for Tools Release 9.0 and 9.1 (well as Release 9.2). Therefore, it is not dependent on Tools 9.2 for delivery or functionality.
- Can be executed on either the JDE Edwards EnterpriseOne Deployment Server or the Development Client.

The impact analysis compares the objects in the manifest table (F96400) with Electronic Software Update (ESU) and Object Librarian (OL) tables to determine if the objects should be replaced or merged with or without custom modifications as defined by the spec merge rules.

This report is run against the source release environment. In addition to using the manifest, the report also accounts for objects that the user has specifically marked as modified (to be merged). The report then provides details for impacted objects in the supported target "from releases" to those that will reside in the "to release" (Release 9.2) as they will be delivered by the Simplified Upgrade.

The results of the Impact Analysis Tool provides a list of objects that will be impacted by the Simplified Upgrade process.

This section describes these tasks:

- *Understanding and Obtaining the Manifest*
- *Using the Simplified Upgrade Impact Analysis Program (P96711)*
- *Processing Options for the Impact Analysis Report (R96711)*
- *Understanding the Impact Analysis Report (R96711)*

Understanding and Obtaining the Manifest

Key to using the impact analysis tool to determine the impact of a Simplified Upgrade is the manifest. This is the `F96400.xml` file that the impact analysis tool loads into the F96400 table. The impact analysis compares the objects in the manifest table (F96400) with Electronic Software Update (ESU) and Object Librarian (OL) tables to determine if the objects should be replaced or merged with or without custom modifications as defined by the spec merge rules.

Manifests are available for supported JD Edwards EnterpriseOne releases, which are Applications Release 9.0.2 and 9.1. You can obtain manifests by these methods:

- **Latest Planner Update ESU**

  The manifest (`F96400.xml`) file is located in the `..\PLANNER\Data` subdirectory on the Deployment Server on which the latest Planner Update was applied. For example:

  Release 9.0.2

  ```
  c:\JDEdwards\E900\PLANNER\Data
  ```

  Release 9.1

`c:\JDEdwards\E910\PLANNER\Data`

- **Update Center**

  The manifests for the supported previous releases are available on the JD Edwards Update Center (updatecenter.oracle.com).

  a. From the Update Center, complete these fields in the Search criteria:

     - **Type**

       Use the pulldown to select: **JD Edwards EnterpriseOne**.
     - **Release**

       Enter the Applications Release for the manifest from which you are upgrading. Valid values are **9.0** and **9.1**.

  b. Click the **Search** button.

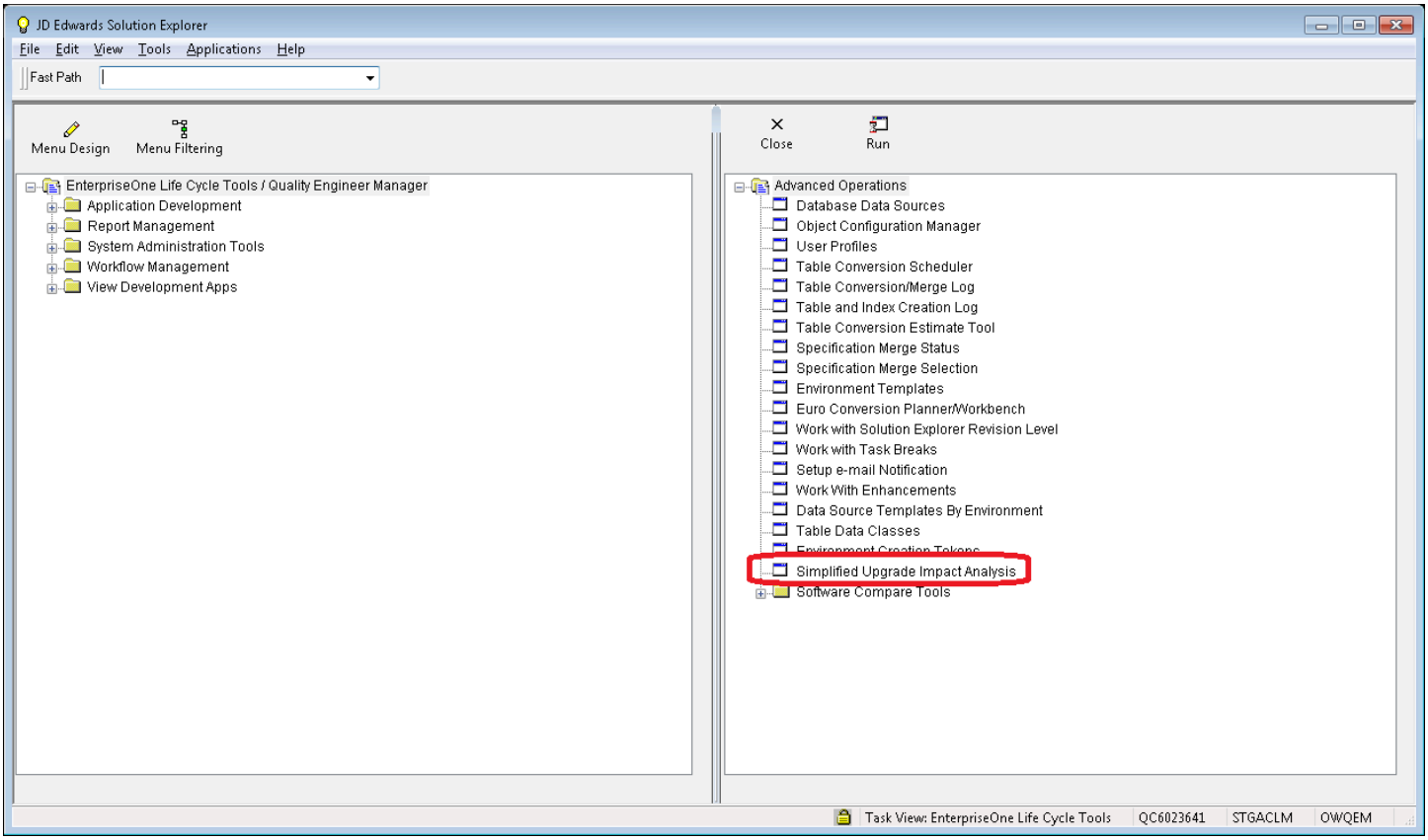
  c. In the displayed results, locate and download the zip file that contains the manifest for your selected release.

     - For Release 9.0.2, the **Name** is: **E920_Manifest_902**.
     - For Release 9.1, the **Name** is: **E920_Manifest_910**.

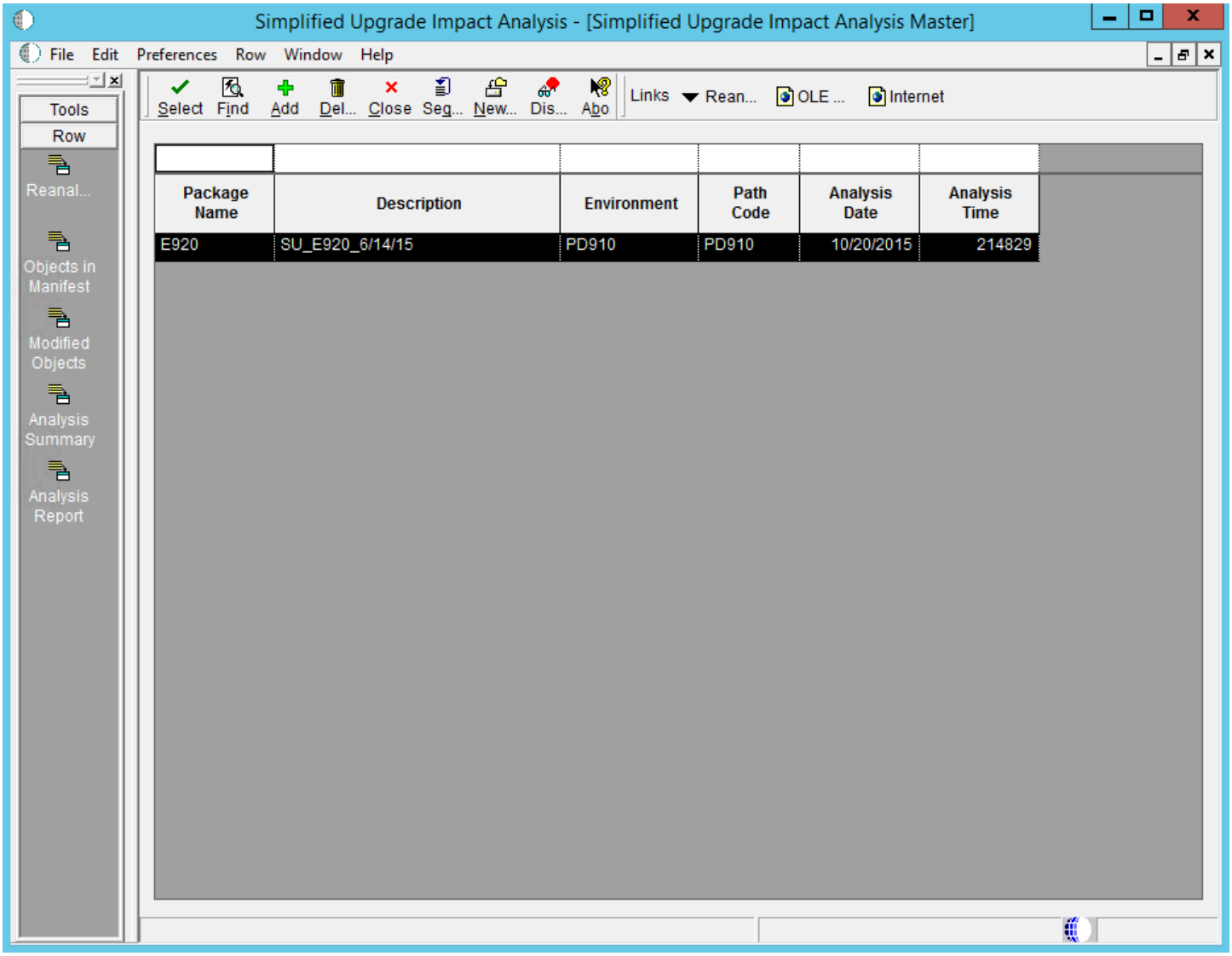
  d. Extract the contents of the zip file and note the location of the extracted `F96400.xml` file. You will need to supply a path to this file when you run the Impact Analysis Program.

Using the Simplified Upgrade Impact Analysis Program (P96711)

You should use the Simplified Upgrade Impact Analysis program (P96711) to define and create the Impact Analysis Report for a Simplified Upgrade. The processing options for this program are described in the section of this chapter entitled: *Processing Options for the Impact Analysis Report (R96711)*.



1. On the Advanced Operations Menu (GH9611), access the Simplified Upgrade Impact Analysis program (P96711).


Simplified Upgrade Impact Analysis - [Simplified Upgrade Impact Analysis Master]
File Edit Preferences Row Window Help
Tools
Row
Reanal...
Objects in Manifest
Modified Objects
Analysis Summary
Analysis Report
Select Find Add Del... Close Seg... New... Dis... Abo
Links Rean... OLE ... Internet
Package Name
Description
Environment
Path Code
Analysis Date
Analysis Time
E920
SU_E920_6/14/15
PD910
PD910
10/20/2015
214829

2. On Simplified Upgrade Impact Analysis Master, click the **Add** button to perform a new analysis. Continue with the next step in this procedure for instructions on adding a new analysis.

   Otherwise, if an existing analysis has been saved, you can use these row exits to reanalyze or to examine the existing results:

   - **Reanalyze**

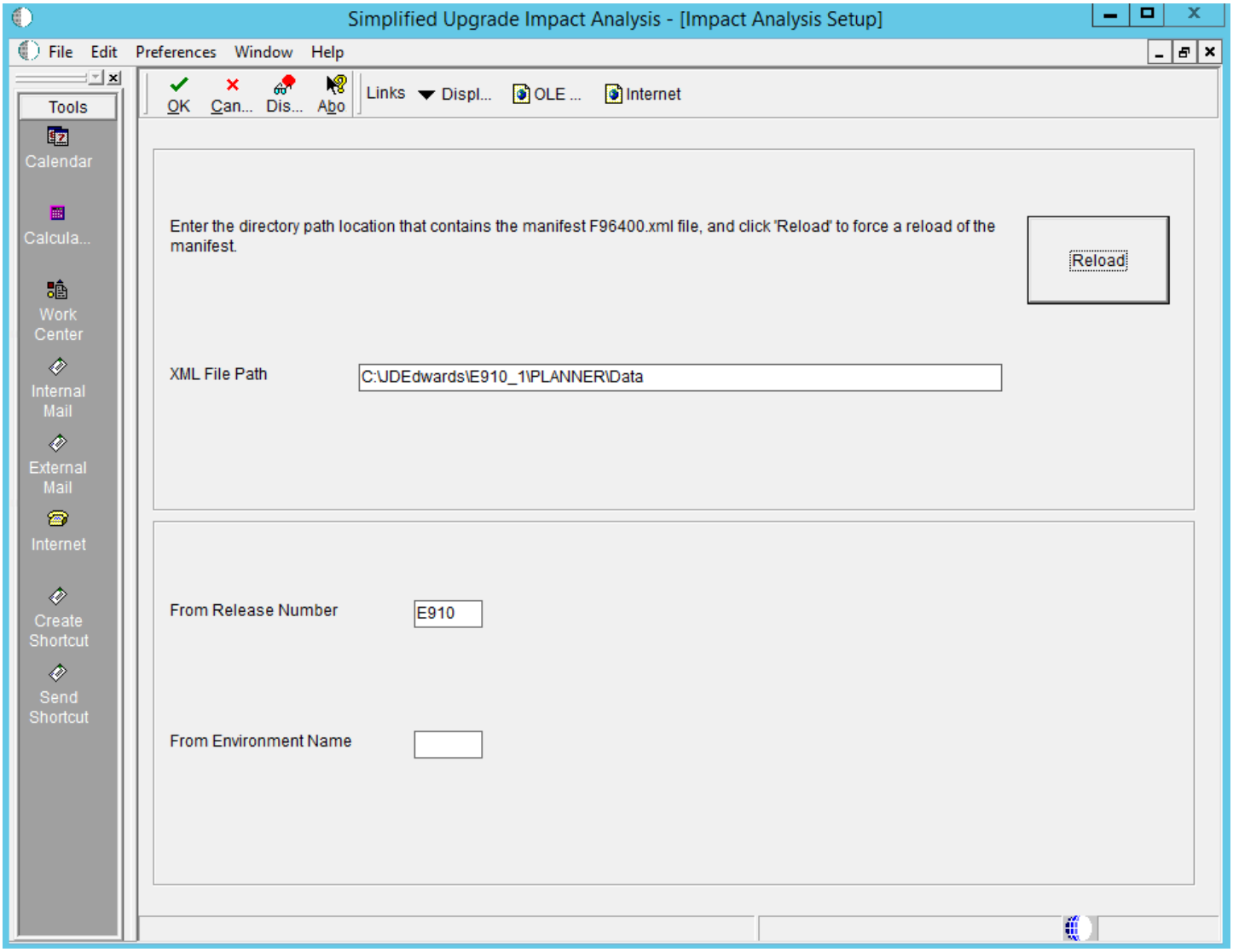
     You can force a reanalysis for such use cases as the data in the `.xml` file for the manifest has changed, or if you have changed the processing options (refer to the subsection in this section entitled: *Understanding the Impact Analysis Report (R96711)*.
   - **Objects in Manifest**

     For a description of this function, refer to Step *5* in this procedure.
   - **Modified Objects**

     For a description of this function, refer to Step *6* in this procedure.
   - **Analysis Summary**

     For a description of this function, refer to Step *8* in this procedure.
   - **Analysis Report**

     For a description of this function, refer to the subsection in this section entitled: *Understanding the Impact Analysis Report (R96711)*.



3. On Impact Analysis Setup, complete these fields:

   - *XML File Path*

     Use this field to specify a directory path to the `F96400.xml` file that contains the manifest to be loaded into the F96400 table. As described in the preceding section entitled: *Understanding and Obtaining the Manifest*, you can obtain the manifest either from the latest Planner Update ESU or from the JD Edwards Update Center. That section also lists typical file locations for the manifest. If you are using a manifest

delivered by a Planner ESU, the `F96400.xml` file is located in the `..\PLANNER\Data` folder. If you obtained the manifest from the Update Center, the file will be in the location where you extracted the downloaded `.zip` file containing the manifest.

The system validates that the specified path contains the `F96400.xml` file. You cannot leave this field blank.

After you enter a valid path, click the **Reload** button to perform the initial load the F96400 table with data from the manifest. In most use cases you will only have to load the manifest one time.

> **CAUTION:** Do not include the filename `F96400.xml` in the path.

- *From Release Number*

  Enter the release number of the target of the Simplified Upgrade analysis report. Valid values are:

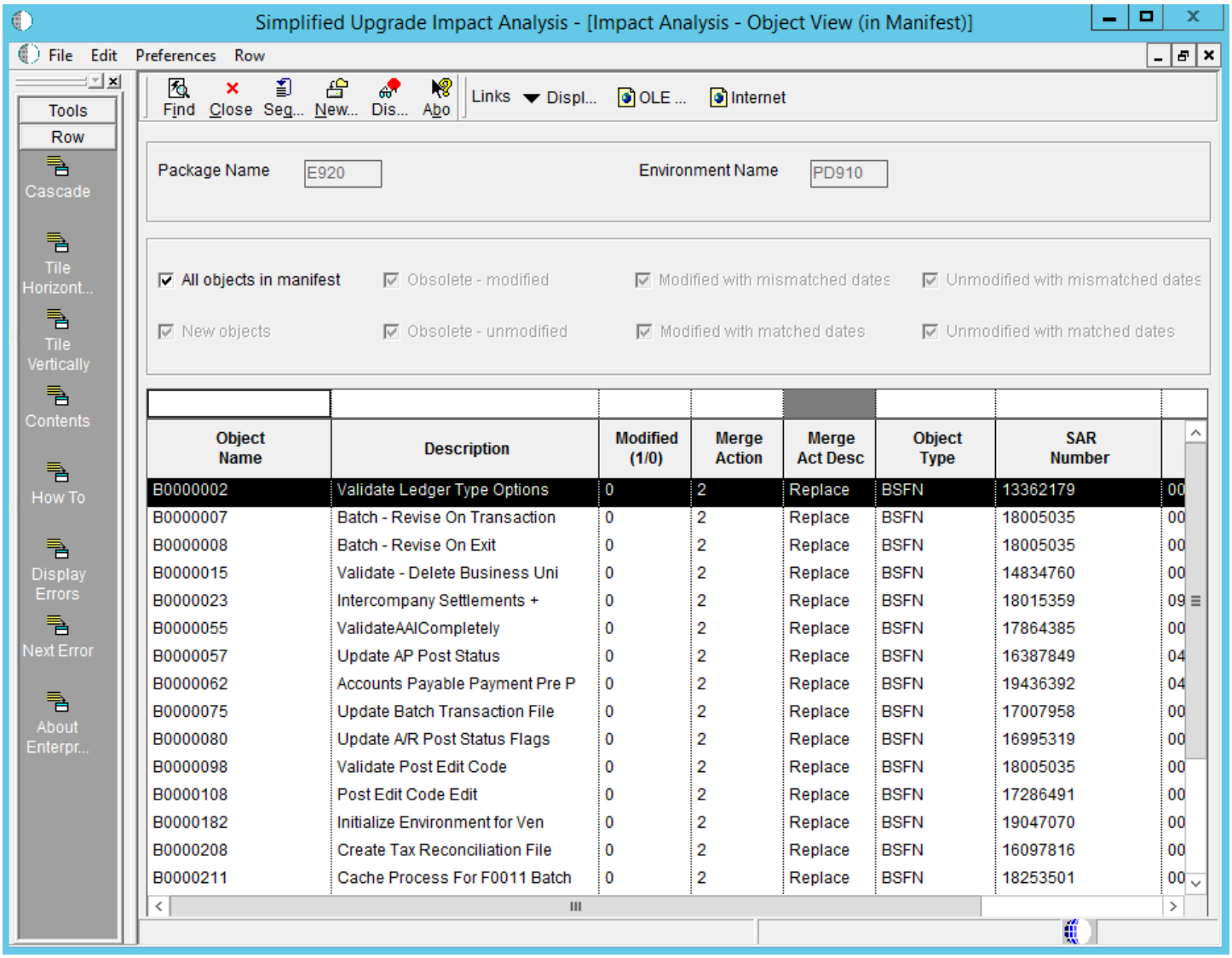
  - E900 (Release 9.0 Update 2)
  - E910 (Release 9.1)

  The system validates that the specified release exists on the Deployment Server. You cannot leave this field blank.
- *From Environment Name*

  Enter the environment name of the target of the Simplified Upgrade analysis report. For example, PY910.

  The system validates that the specified environment exists on the Deployment Server. You cannot leave this field blank.

4. Click the **OK** button to accept the values at which point the system creates the report and displays it in Object view, as shown below.



Object Name	Description	Modified (1/0)	Merge Action	Merge Act Desc	Object Type	SAR Number	
B0000002	Validate Ledger Type Options	0	2	Replace	BSFN	13362179	00
B0000007	Batch - Revise On Transaction	0	2	Replace	BSFN	18005035	00
B0000008	Batch - Revise On Exit	0	2	Replace	BSFN	18005035	00
B0000015	Validate - Delete Business Uni	0	2	Replace	BSFN	14834760	00
B0000023	Intercompany Settlements +	0	2	Replace	BSFN	18015359	09
B0000055	ValidateAAICompletely	0	2	Replace	BSFN	17864385	00
B0000057	Update AP Post Status	0	2	Replace	BSFN	16387849	04
B0000062	Accounts Payable Payment Pre P	0	2	Replace	BSFN	19436392	04
B0000075	Update Batch Transaction File	0	2	Replace	BSFN	17007958	00
B0000080	Update A/R Post Status Flags	0	2	Replace	BSFN	16995319	00
B0000098	Validate Post Edit Code	0	2	Replace	BSFN	18005035	00
B0000108	Post Edit Code Edit	0	2	Replace	BSFN	17286491	00
B0000182	Initialize Environment for Ven	0	2	Replace	BSFN	19047070	00
B0000208	Create Tax Reconciliation File	0	2	Replace	BSFN	16097816	00
B0000211	Cache Process For F0011 Batch	0	2	Replace	BSFN	18253501	00

5. On Impact Analysis - Object View (in Manifest), you can use the checkboxes to filter the results.

   - **All objects in manifest**

     If you uncheck the above checkbox you can choose to display one or more groups of objects as identified by the other checkboxes.

     > **Note:** This checkbox must be unchecked in order to enable the selection of the other checkboxes. When this checkbox is selected, the other checkboxes are grayed-out (non-selectable).

   - **New objects**

     These are the net new objects that are delivered with Release 9.2

   - **Obsolete - Modified**

     These are the objects that are marked as obsolete by Release 9.2, but which contain custom modifications. These objects will be removed by the Simplified Upgrade process.

   - **Obsolete - Unmodified**

     These are the objects that are marked as obsolete by Release 9.2 and which do not contain custom modifications. These objects will be removed by the Simplified Upgrade process.

   - **Modified with mismatched dates**

     These are objects that are flagged as having custom modifications and that have mismatched dates. These objects will be replaced or merged by the Simplified Upgrade process as outlined by the standard JD Edwards EnterpriseOne spec merge rules. These objects need to be retrofitted after the Spec Merge.

   - **Modified with matched dates**

     These are objects that are detected as having custom modifications and that have matched dates. Typically this means these objects do not have custom modifications. These objects will be replaced or merged by the Simplified Upgrade process as outlined by the standard JD Edwards EnterpriseOne spec merge rules.

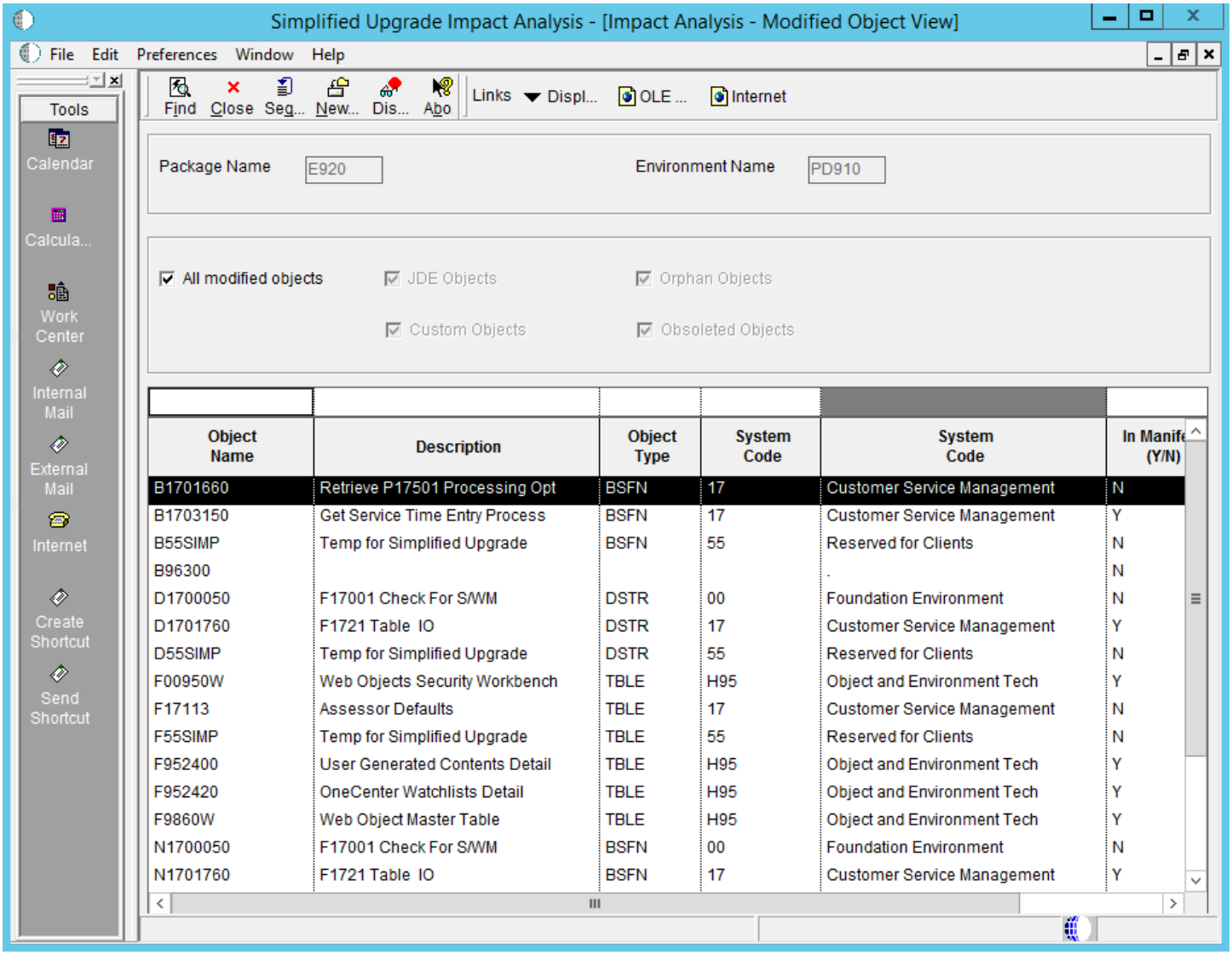
   - **Unmodified with mismatched dates**

     These are objects that are detected as having no custom modifications but which have mismatched dates. This means these objects might have custom modifications. These objects will be replaced or merged by the Simplified Upgrade process as outlined by the standard JD Edwards EnterpriseOne spec merge rules.

   - **Unmodified with matched dates**

     These are the objects that are detected as not being flagged as modified and which have matched dates that confirms they are not modified. These objects will be replaced or merged by the Simplified Upgrade process as outlined by the standard JD Edwards EnterpriseOne spec merge rules.

6. If on Simplified Upgrade Impact Analysis Master you take the Row Exit for Modified Objects, the following screen is displayed:



Object Name	Description	Object Type	System Code	System Code	In Manife (Y/N)
B1701660	Retrieve P17501 Processing Opt	BSFN	17	Customer Service Management	N
B1703150	Get Service Time Entry Process	BSFN	17	Customer Service Management	Y
B55SIMP	Temp for Simplified Upgrade	BSFN	55	Reserved for Clients	N
B96300				.	N
D1700050	F17001 Check For S/WM	DSTR	00	Foundation Environment	N
D1701760	F1721 Table IO	DSTR	17	Customer Service Management	Y
D55SIMP	Temp for Simplified Upgrade	DSTR	55	Reserved for Clients	N
F00950W	Web Objects Security Workbench	TBLE	H95	Object and Environment Tech	Y
F17113	Assessor Defaults	TBLE	17	Customer Service Management	N
F55SIMP	Temp for Simplified Upgrade	TBLE	55	Reserved for Clients	N
F952400	User Generated Contents Detail	TBLE	H95	Object and Environment Tech	Y
F952420	OneCenter Watchlists Detail	TBLE	H95	Object and Environment Tech	Y
F9860W	Web Object Master Table	TBLE	H95	Object and Environment Tech	Y
N1700050	F17001 Check For S/WM	BSFN	00	Foundation Environment	N
N1701760	F1721 Table IO	BSFN	17	Customer Service Management	Y

7. On Impact Analysis - Modified Object View, you can use the checkboxes to filter the results.

   - **All modified objects**

     If you uncheck the above checkbox you can choose to display one or more groups of objects as identified by the other checkboxes.

     These are the records in the F9861 that have the C/1 flags (SIMRGMOD/SIMRGOPT).

     > **Note:** This checkbox must be unchecked in order to enable the selection of the other checkboxes. When this checkbox is selected, the other checkboxes are grayed-out (non-selectable).

   - **JDE objects**

     These are standard JDE objects that are delivered with Release 9.2 through the Simplified Upgrade process.

     These are the JDE objects that have been modified, but which does not include obsolete or orphaned objects. These objects will be replaced or merged by the Simplified Upgrade process as outlined by the standard JD Edwards EnterpriseOne spec merge rules. These objects need to be retrofitted after the Spec Merge.
   - **Custom Objects**

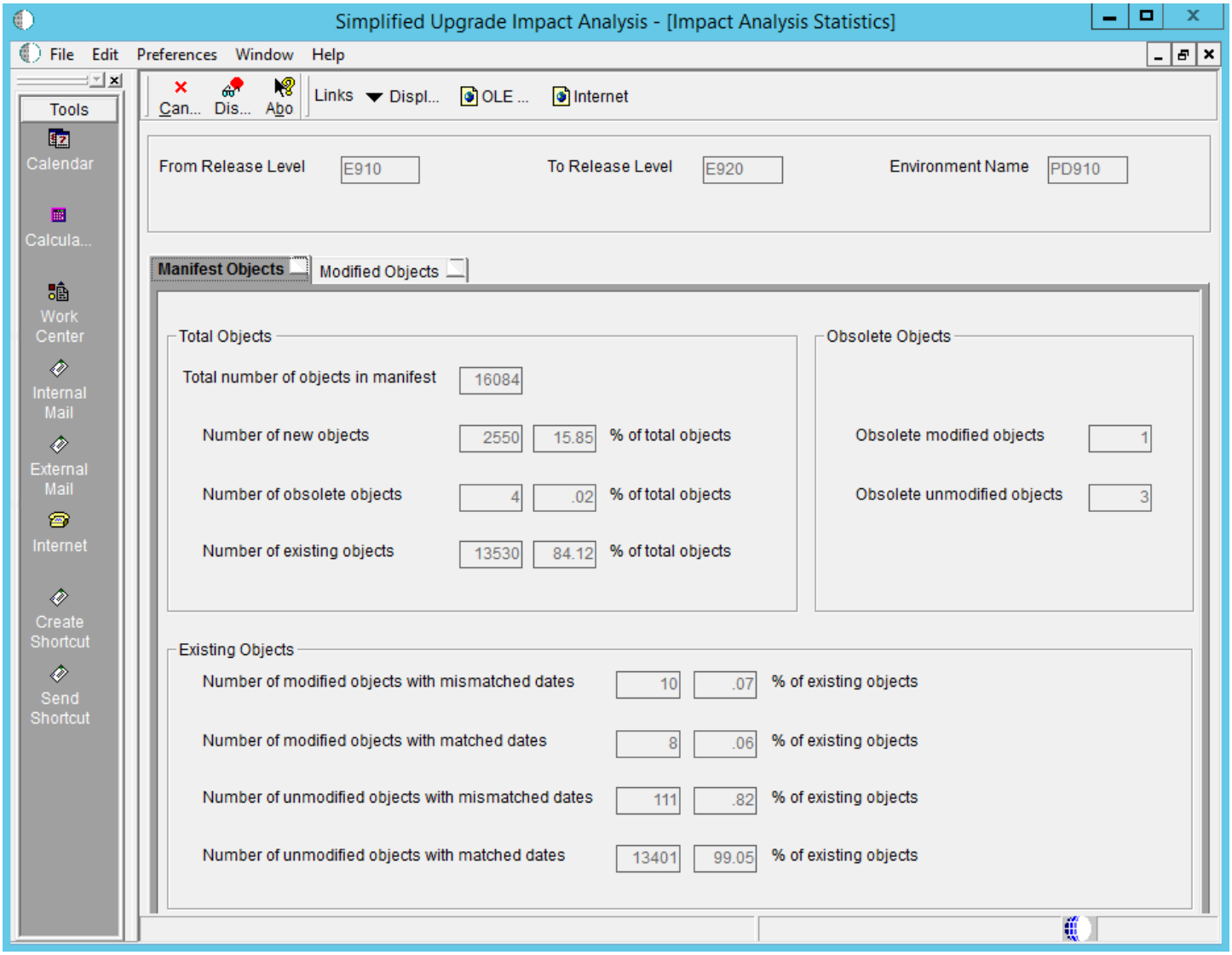
     These are non-JDE objects with System Codes 55-69 and Z*, and which are not in the manifest. These objects will be left in place and not be altered as part of the simplified upgrade process.
   - **Orphan Objects**

     These are the objects that exist in the Object Librarian Status Detail table (F9861) but which do not exist in the Object Librarian Master table (F9860). These objects will not be preserved (that is, migrated to Release 9.2) by the Simplified Upgrade process.
   - **Obsoleted Objects**

     These are the objects that are marked as obsolete by Release 9.2. Regardless of whether these objects are marked as customized or not, all obsolete objects will be removed by the Simplified Upgrade process.

     These are the modified objects that have System Code 88 in the Object Librarian Master table (F9860) or marked as obsolete in the Manifest..

8. If on Simplified Upgrade Impact Analysis Master you take the Row Exit for Analysis Summary, the following screen is displayed:



9. On Impact Analysis Statistics, you can view analysis summary information by clicking one of these tabs:

   - **Manifest Objects**

     This tab contains sections that show statistics for the Total Objects, Obsolete Objects, and Existing Objects. These statistics include total numbers for specified groups of objects along with a percentage of the impact of those groups on the Simplified Upgrade process as a whole.

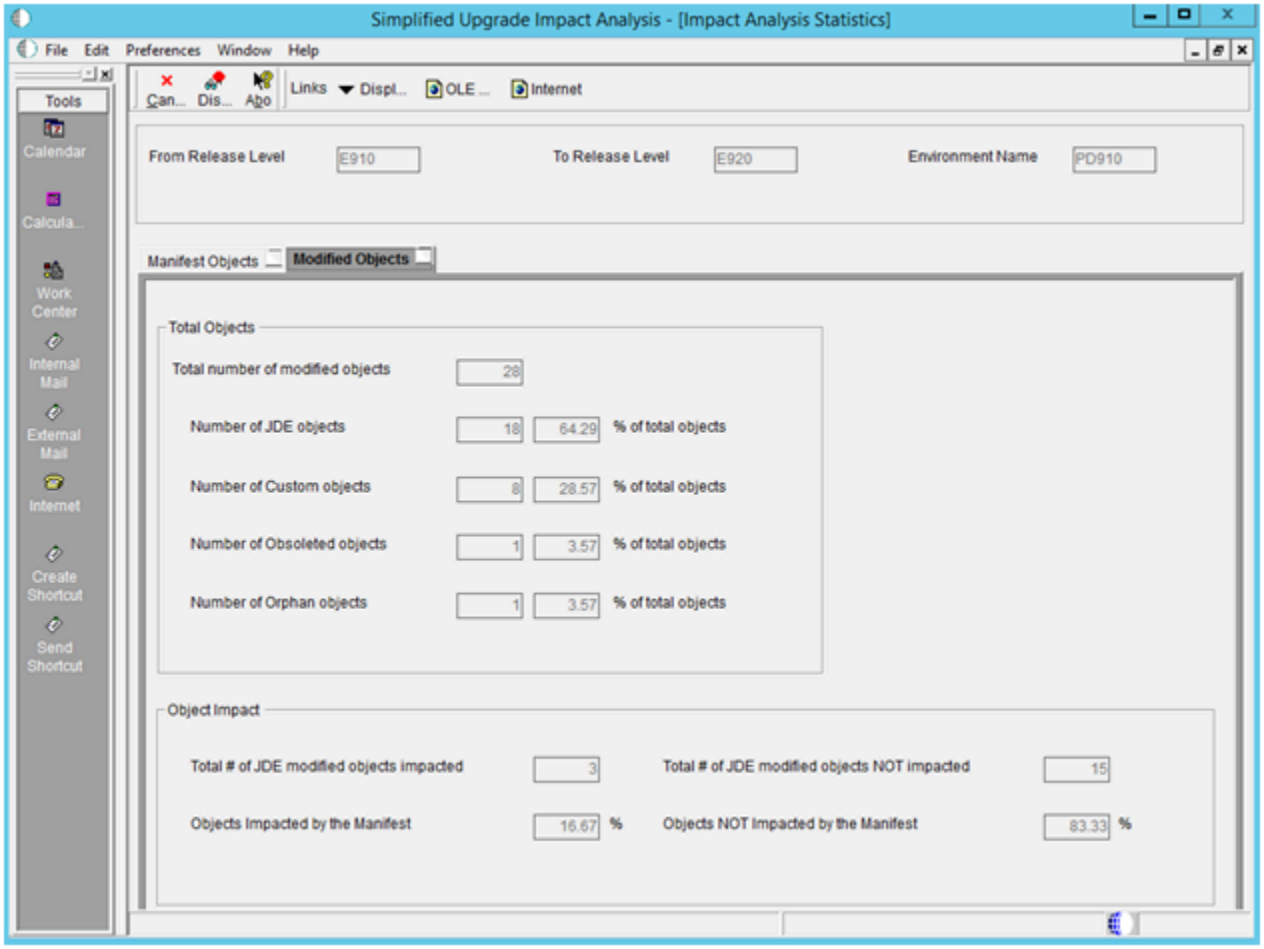
     A sample of such statistics is shown in the preceding screen, where the selected tab is **Manifest Objects**.

     The definition of the results shown in **Total Objects** section is described in Step 7 in the section describing the functionally equivalent corresponding checkboxes.
   - **Modified Objects**

     This tab contains sections that show statistics for the Total Modified Objects. These statistics include total numbers for specified groups of objects along with a percentage of the impact of those groups on the Simplified Upgrade process as a whole.

     A sample of such statistics is shown below, where the selected tab is **Modified Objects**.

     The definition of the results shown in **Object Impact** section is described after the following screen.



The results shown in **Object Impact** section are defined as:

- **Total JDE modified objects NOT impacted**

  Total # of JDE objects with C/1 flag minus those with mismatched dates.
- **Objects Impacted by the Manifest**

  Shown as a percentage calculated by dividing the Total # of JDE modified objects impacted with mismatched dates by the Number of JDE objects.
- **Objects NOT Impacted by the Manifest**

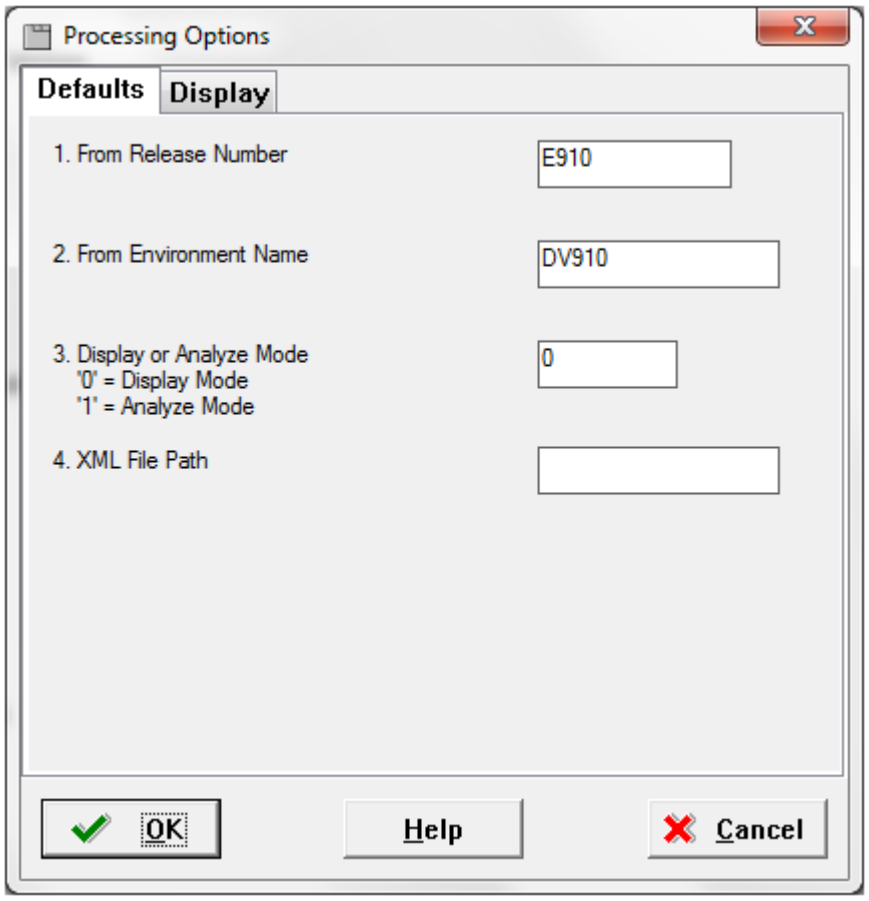
  Shown as a percentage calculated by dividing the Total # of JDE modified objects NOT impacted by the Number of JDE Objects.

Processing Options for the Impact Analysis Report (R96711)

This section describes the processing options for the Impact Analysis Report (R96711).

1. You can run R96711 from Batch Versions.
2. Choose Prompt for Processing Option.

   The Processing Options form appears.



3. On the Defaults tab, enter values for these fields:

   - *From Release Number*

     Enter the release number of the target of the Simplified Upgrade analysis report. Valid values are:

     - E900 (Release 9.0 Update 2)
     - E910 (Release 9.1)
   - *From Environment Name*

     Enter the environment name of the target of the Simplified Upgrade analysis report. For example, DV910.
   - *Display or Analyze Mode*

     Valid values are:

     - *0 = Display Mode*

       Use this option to print an existing report.
     - *1 = Analyze Mode*

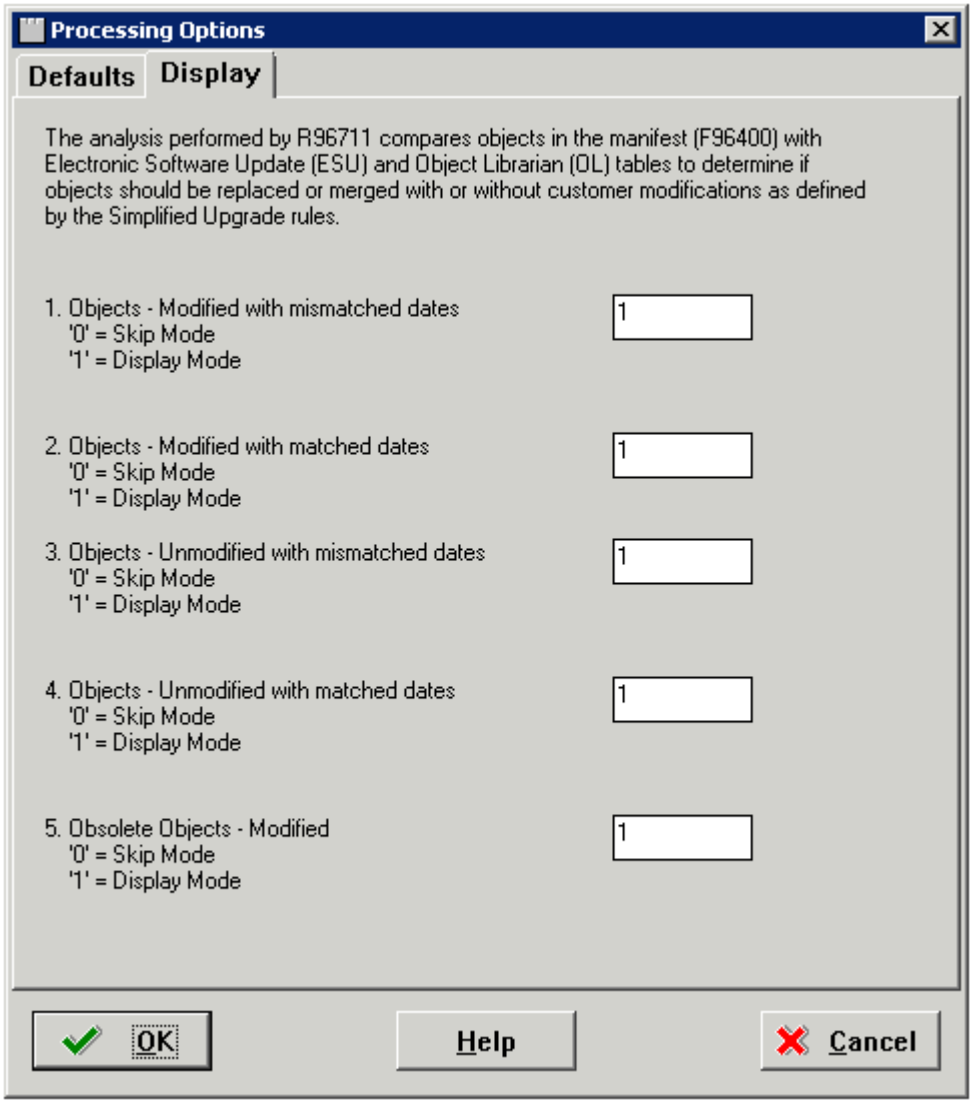
       Use this option to perform a new analysis and print the report.
   - *XML File Path*

     If you specify a directory path to the `F96400.xml` file in this processing option, it will force a reload of the manifest into the F96400 table. This filename is hard coded and should not be renamed or the analyzer program will not function. The system uses this file to load the manifest data into the F96400 table.

     The file to be reloaded might be an updated or altered version of the manifest that is different from the version delivered by the GA release of JD Edwards EnterpriseOne Release 9.0.2 or 9.1, which are the supported releases for Simplified Upgrade.

     If you leave this field blank the system will not reload the manifest.

4. Click the **OK** button to accept any processing option values.



5. On the Display tab, enter values to determine how you want the report to display. You can choose to Skip (0) or Display (1) the viewing mode for these five (5) categories of objects:

   - 1. Objects - Modified with mismatched dates

     These are objects that are flagged as having custom modifications and that have mismatched dates. These objects will be replaced or merged by the Simplified Upgrade process as outlined by the standard JD Edwards EnterpriseOne spec merge rules.
   - 2. Objects - Modified with matched dates

     These are objects that are detected as having custom modifications and that have matched dates. Typically this means these objects do not have custom modifications. These objects will be replaced or

merged by the Simplified Upgrade process as outlined by the standard JD Edwards EnterpriseOne spec merge rules.

- 3. Objects - Unmodified with mismatched dates

  These are objects that are detected as having no custom modifications but which have mismatched dates. This means these objects are not marked as having custom modifications but because they have mismatched dates for purposes of a Simplified Upgrade it is assumes they might have custom modifications. These objects will be replaced or merged by the Simplified Upgrade process as outlined by the standard JD Edwards EnterpriseOne spec merge rules.
- 4. Objects - Unmodified with matched dates

  These are the objects that are detected as not being flagged as modified and which have matched dates that confirms they are not modified. These objects will be replaced or merged by the Simplified Upgrade process as outlined by the standard JD Edwards EnterpriseOne spec merge rules.
- 5. Obsolete Objects - Modified

  These are the objects that are marked as obsolete by Release 9.2, but which contain custom modifications. These objects will be removed by the Simplified Upgrade process.

The following table shows the logic and meaning of each display section.

Section	Modified Flag Set? (Y/N)	ESU date compare with OL date	Meaning
1	Y	<>	The customer modified these objects as indicated by the ESU date mismatch with the OL date. After the spec merge, these objects will be replaced/changed. These objects might need to be retrofitted.
2	Y	==	These objects are marked as modified, but the ESU date is mismatched with the OL date. These object may not have been modified by the customer. After the spec merge, these object might not need to be retrofitted.
3	N	<>	These objects are not marked as modified and the ESU date matches the OL date. Therefore, these objects do not need to be retrofitted after the spec merge.
4	N	==	These objects were not marked as modified, but the ESU date is mismatched with the OL date. The customer might need to check and/or change the C/1 flag for these objects depending on the desired outcome.
5	Y	<>	These obsolete objects were modified or changed by the customer. These objects will be deleted after the spec merge.

6. Click the **OK** button to accept the processing values for Display Mode.

Understanding the Impact Analysis Report (R96711)

This section describes these topics:

- *Object Analysis Characteristics*
- *Running the Impact Analysis Report (R96711)*

Object Analysis Characteristics

The hierarchy of the Impact Analysis Report lists objects with these characteristics:

Total Number of Objects in Manifest

This is the total number of objects that is the sum of the **Total Number of New Objects** and **Total Number of Existing Objects**.

- **Total Number of New Objects**

  These are net new objects for Release 9.2 and will be delivered by the Simplified Upgrade.

- **Total Number of Existing Objects**

  This is the total count of the objects that exist in the target release. Of this object total, the report compares those objects against the manifest and makes these distinctions which will have the described result: These objects need to be retrofitted after the Spec Merge.

  - **Number of Modified Objects (With Mismatched Dates)**

    These objects have been modified by JD Edwards EnterpriseOne for Release 9.2. These objects will be replaced or merged by the Simplified Upgrade as outlined by the standard JD Edwards EnterpriseOne spec merge rules.

  - **Number of Modified Objects (With Matched Dates)**

    These objects have been flagged by the customer as having been modified by the user. Such objects will be replaced by the Simplified Upgrade because JD Edwards has modified them for Release 9.2.

    If these objects were modified, objects might need to be retrofitted with their custom modifications. The date match means these objects might not have customer modification, because the Object Librarian dates match the ESU dates.

    If the customer feels these objects were not actually customized, in order to prevent them from being merged by the spec merge rules, the merge setting should be set to option to '2'. This turns off the

modified flag so the objects will be replaced and these objects are not marked as requiring to be retrofitted.

- **Number of Unmodified Objects (With Mismatched Dates)**

  Typically this means that these objects do not have custom modifications. However, these objects have mismatched dates which may indicate they have been modified. These objects will be replaced or merged by the Simplified Upgrade as outlined by the standard JD Edwards EnterpriseOne merge rules.

  If the customer feels these objects were actually customized, they can turn on the modified flag before the merge.
- **Number of Unmodified Objects (With Matched Dates)**

  These are the objects that have not been modified by the customer, as confirmed by matching date stamps. These objects that will be replaced by the Simplified Upgrade process.

- **Total Number of Obsolete Objects (Modified)**
  - The reports lists the total number of objects that are marked as obsolete by JD Edwards Release 9.2. These objects will be deleted by the Simplified Upgrade process.
  - **Number of Obsolete Objects (Unmodified)**

    These are the objects that Release 9.2 has identified as obsolete but which have their customization flag set to Customized. These objects will be deleted by the Simplified Upgrade process.
- **Total Number of Modified Objects**
  - Number of JDE Modified Objects

    These are standard JDE objects that are delivered with Release 9.2 through the Simplified Upgrade process.
  - Number of Custom Modified Objects

    These are non-JDE objects with System Codes 55-69 and Z*, and which are not in the manifest.
  - Number of Obsoleted Objects

    These are the objects that are marked as obsolete by Release 9.2. Regardless of whether these objects are marked as customized or not, all obsolete objects will be removed by the Simplified Upgrade process.

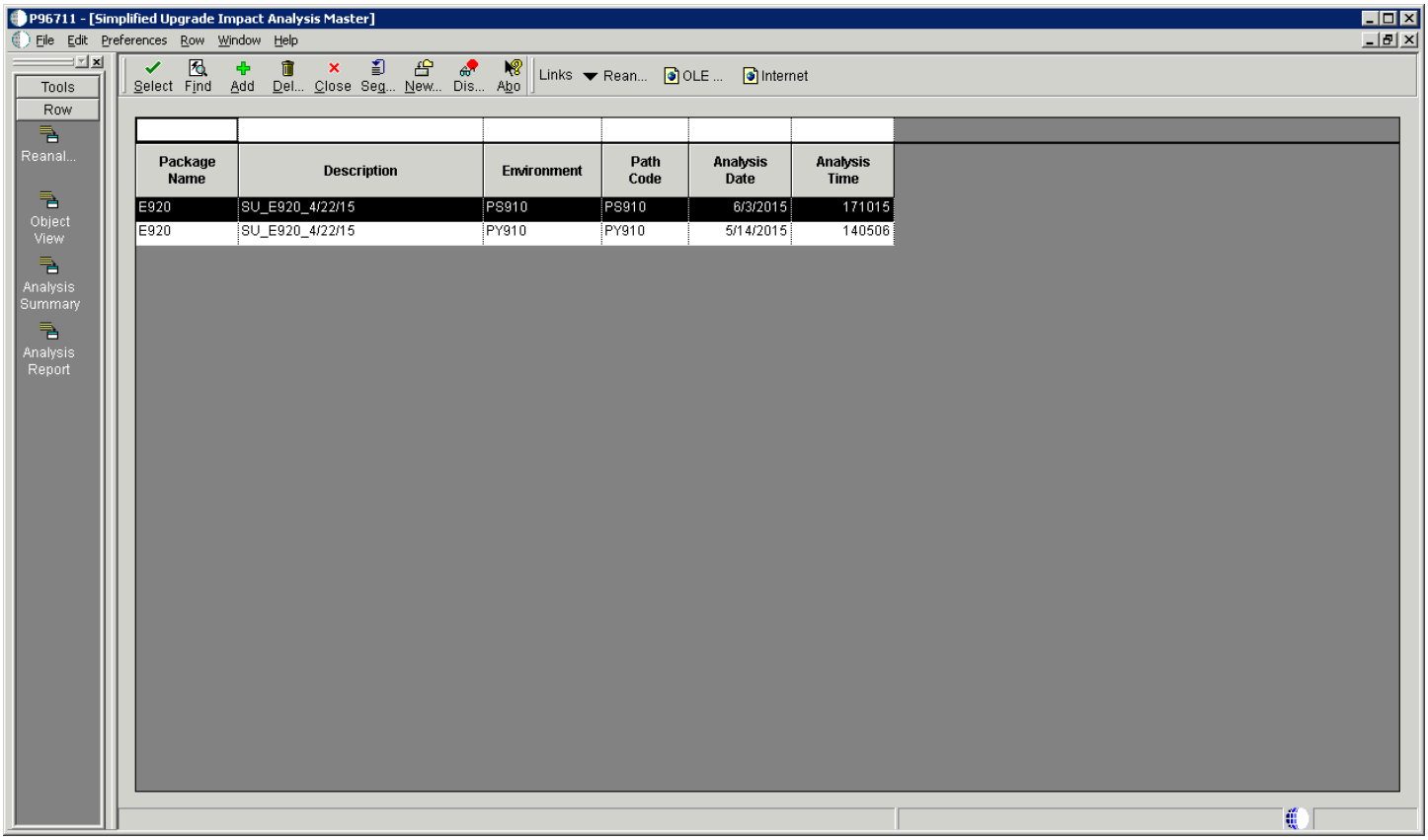
    These are the modified objects that have System Code 88 in the F9860 table or marked as obsolete in the Manifest.
  - Number of Orphan Objects

    These are the objects that exist in the F9861 table but which do not exist in the F9860 table. These objects will not be preserved (migrated to Release 9.2) by the Simplified Upgrade process.

Running the Impact Analysis Report (R96711)

> **Note:** For Release 9.2, the Package Name for a Simplified Upgrade Impact Analysis Report will always be 920. However, multiple packages with the same name can be created for multiple environments.

To run the Impact Analysis Report (R96711), select Simplified Upgrade Impact Analysis (P96711) from the Advanced Operations Menu (GH9611).



From the Simplified Upgrade Impact Analysis Master, you can highlight an existing report and use form exits to perform these functions:

- Reanalyze
  Reloads the manifest and reruns the Impact Analysis Report.
- Object View

Displays the Impact Analysis Report with a list of all details of all objects that will be affected by the Simplified Upgrade including the merge action such as change, replace, add, or delete.

For a description of the these objects or groups of objects, refer to the section of this chapter entitled: *Using the Simplified Upgrade Impact Analysis Program (P96711)*.

- Analysis Summary Report

  Displays a statistical summary of the types and number of objects that will be impacted by the Simplified Upgrade.

- Analysis Report (R96701)

  Creates a detailed report that includes each object that will be impacted by the Simplified Upgrade.

Example - Analysis Report (R96701) - (1 of 2)

The following screen shows an example of an Analysis Summary Report (R96701).

R96711
XJDE0001

Worldwide Company
Simplified Upgrade Impact Analysis Report

From Release:	E910
To Release	E920
Environment:	PD910
Mode:	Display Only

Total Number of Objects in Manifest: 16084

Total Number of New Objects: 2550

Total Number of Existing Objects: 13530

Number of Modified Objects: (With Mismatched Dates)	10	.07%
Number of Modified Objects: (With Matched Dates)	8	.06%
Number of Unmodified Objects: (With Mismatched Dates)	111	.82%
Number of Unmodified Objects (With Matched Dates)	13401	99.05%

Total Number of Obsolete Objects: 4

Number of Obsolete Objects (Modified):	1
Number of Obsolete Objects (Unmodified):	3

Total Number of Modified Objects: 28

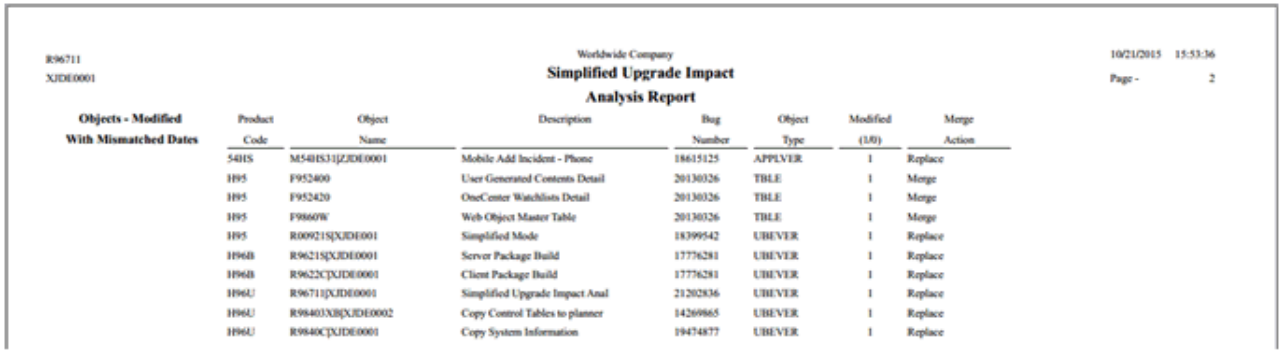
Number of JDE Modified Objects:	18
Number of Custom Modified Objects:	8
Number of Obsoleted Objects:	1
Number of Orphan Objects:	1

Object Impact

Total # of JDE Modified Objects impacted:	3	16.67%
Total # of JDE Modified Objects NOT impacted:	15	83.33%

Example - Analysis Report (R96701) - (2 of 2)

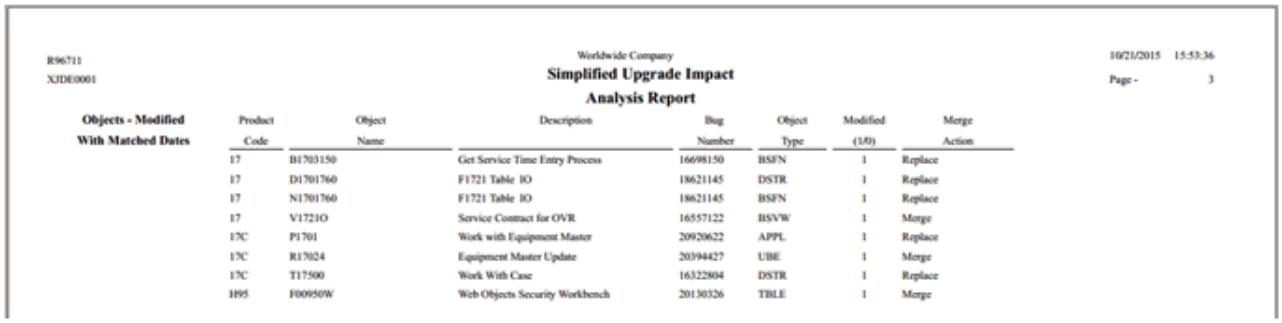
The following screen shows an example of an Analysis Summary Report (R96701).



R96711 Worldwide Company 10/21/2015 15:53:36
XJDE0001 **Simplified Upgrade Impact** Page - 2
Analysis Report

Objects - Modified With Mismatched Dates

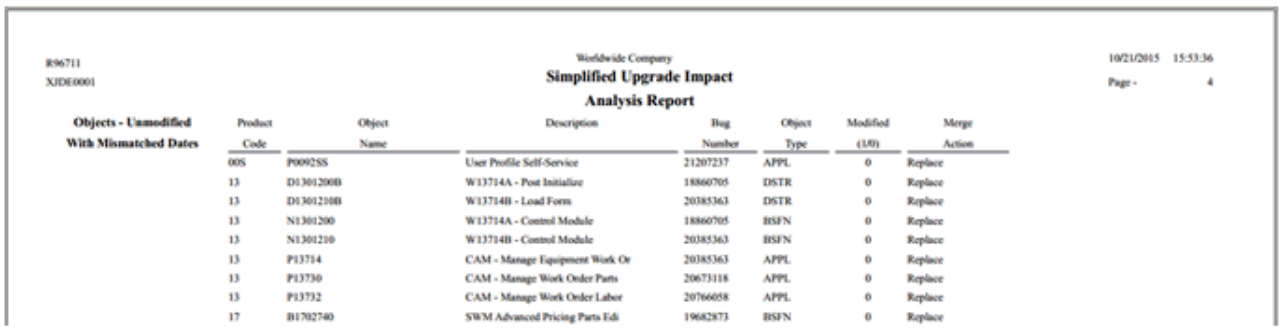
Product Code	Object Name	Description	Bug Number	Object Type	Modified (1/0)	Merge Action
54HS	M54HS31JZJDE0001	Mobile Add Incident - Phone	18615125	APPLVER	1	Replace
H95	F952400	User Generated Contents Detail	20130326	TBLE	1	Merge
H95	F952420	OneCenter Watchlists Detail	20130326	TBLE	1	Merge
H95	F98680W	Web Object Master Table	20130326	TBLE	1	Merge
H95	R00921S[XJDE001	Simplified Mode	18399542	UBEVER	1	Replace
H96B	R96215[XJDE0001	Server Package Build	17776281	UBEVER	1	Replace
H96B	R9622C[XJDE0001	Client Package Build	17776281	UBEVER	1	Replace
H96U	R96711[XJDE0001	Simplified Upgrade Impact Anal	21202836	UBEVER	1	Replace
H96U	R98403XB[XJDE0002	Copy Control Tables to planner	14269865	UBEVER	1	Replace
H96U	R9840C[XJDE0001	Copy System Information	19474877	UBEVER	1	Replace



R96711 Worldwide Company 10/21/2015 15:53:36
XJDE0001 **Simplified Upgrade Impact** Page - 3
Analysis Report

Objects - Modified With Matched Dates

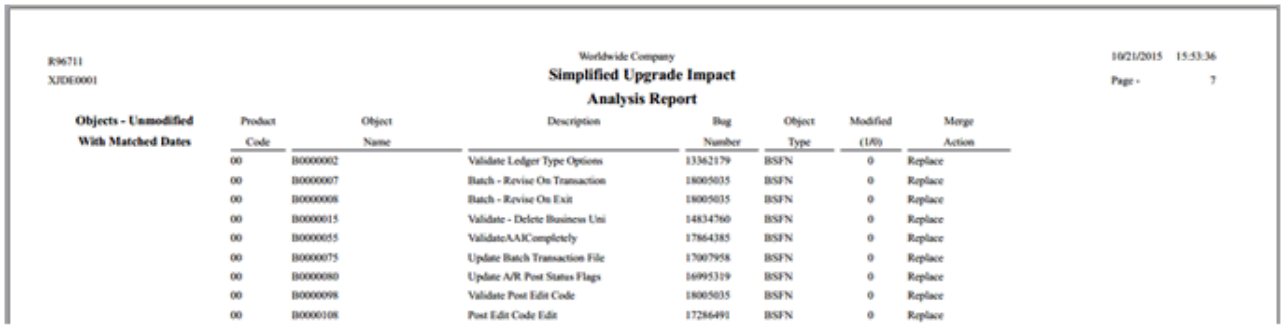
Product Code	Object Name	Description	Bug Number	Object Type	Modified (1/0)	Merge Action
17	B1703150	Get Service Time Entry Process	16698150	BSFN	1	Replace
17	D1701760	F1721 Table IO	18621145	DSTR	1	Replace
17	N1701760	F1721 Table IO	18621145	BSFN	1	Replace
17	V1721O	Service Contract for OVR	16557122	BSVW	1	Merge
17C	P1701	Work with Equipment Master	20920622	APPL	1	Replace
17C	R17024	Equipment Master Update	20394427	UBE	1	Merge
17C	T17500	Work With Case	16322804	DSTR	1	Replace
H95	F00950W	Web Objects Security Workbench	20130326	TBLE	1	Merge



R96711 Worldwide Company 10/21/2015 15:53:36
XJDE0001 **Simplified Upgrade Impact** Page - 4
Analysis Report

Objects - Unmodified With Mismatched Dates

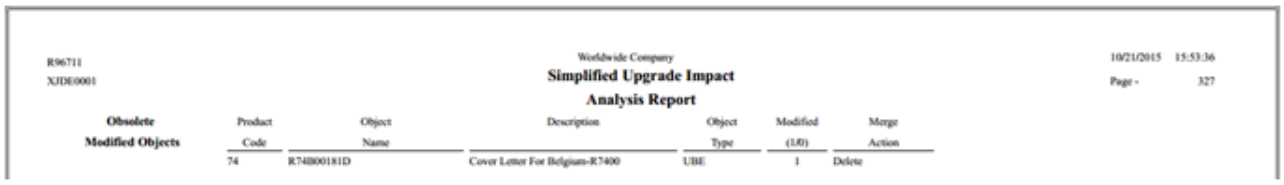
Product Code	Object Name	Description	Bug Number	Object Type	Modified (1/0)	Merge Action
00S	P0092SS	User Profile Self-Service	21207237	APPL	0	Replace
13	D1301200B	W13714A - Post Initialize	18860705	DSTR	0	Replace
13	D1301210B	W13714B - Load Form	20385363	DSTR	0	Replace
13	N1301200	W13714A - Control Module	18860705	BSFN	0	Replace
13	N1301210	W13714B - Control Module	20385363	BSFN	0	Replace
13	P13714	CAM - Manage Equipment Work Or	20385363	APPL	0	Replace
13	P13730	CAM - Manage Work Order Parts	20673118	APPL	0	Replace
13	P13732	CAM - Manage Work Order Labor	20766058	APPL	0	Replace
17	B1702740	SWM Advanced Pricing Parts Edi	19682873	BSFN	0	Replace



R96711 Worldwide Company 10/21/2015 15:53:36
XJDE0001 **Simplified Upgrade Impact** Page - 7
Analysis Report

Objects - Unmodified With Matched Dates

Product Code	Object Name	Description	Bug Number	Object Type	Modified (1/0)	Merge Action
00	B0000002	Validate Ledger Type Options	13362179	BSFN	0	Replace
00	B0000007	Batch - Revise On Transaction	18005035	BSFN	0	Replace
00	B0000008	Batch - Revise On Exit	18005035	BSFN	0	Replace
00	B0000015	Validate - Delete Business Uni	14834760	BSFN	0	Replace
00	B0000055	ValidateAAICompletely	17864385	BSFN	0	Replace
00	B0000075	Update Batch Transaction File	17007958	BSFN	0	Replace
00	B0000080	Update A/R Post Status Flags	16995319	BSFN	0	Replace
00	B0000098	Validate Post Edit Code	18005035	BSFN	0	Replace
00	B0000108	Post Edit Code Edit	17286491	BSFN	0	Replace



R96711 Worldwide Company 10/21/2015 15:53:36
XJDE0001 **Simplified Upgrade Impact** Page - 327
Analysis Report

Obsolete Modified Objects

Product Code	Object Name	Description	Object Type	Modified (1/0)	Merge Action
74	R74B00181D	Cover Letter For Belgium-R7400	UBE	1	Delete

Preparing to Upgrade to the 32-bit Version of Release 9.2

The Upgrade order should be:

1. Save off the environment that you are upgrading from. You may need a saved copy in this state for recovering UDOs and for determining custom modifications to objects.
2. Install the Deployment Server, which includes *JD Edwards EnterpriseOne* Tools *Release 9.2* .
3. Install the Platform Pack, which includes *JD Edwards EnterpriseOne* Applications *Release 9.2* .
4. Install a Server Manager Agent on the Deployment Server.
5. Register the Deployment Server with Server Manager.
6. Use Server Manager to install the latest 32-bit *JD Edwards EnterpriseOne* Tools Release for the Deployment Server that is required to support *JD Edwards EnterpriseOne* Applications *Release 9.2* . Tools Release 9.2.5.x supports 32-bit. Tools Release 9.2.6.x and above supports only 64-bit.
7. Install the latest planner update.

   For example, if you are upgrading from *JD Edwards EnterpriseOne* 8.9 to *JD Edwards EnterpriseOne* *Release 9.2* , you should install the most recent *Release 9.2* planner update.
8. Run the Installation Planner.
9. Run the Installation Workbench.
10. Build packages.
11. Run post upgrade manual table conversions.
12. Apply all ESUs from the update center to get fix current.
13. Use Visual Compare to retrofit custom objects.

By following this procedure, you are assured of saving time and avoiding extra work associated with retrofitting and retesting custom code in the future.

Before you begin the upgrade, you must prepare your current development, production, and prototype environments and back up your Deployment Server, Enterprise Servers, and databases.

You must complete these preparatory tasks before the upgrade team arrives.

> **CAUTION:** It is important to turn off Table Auditing, if you are using it, before beginning the upgrade process. Failure to do so may cause the audited tables to be in inconsistent states, requiring the tables to be recovered. For more information on turning off the Table Audit function, refer to the *JD Edwards EnterpriseOne Tools Auditing Administration Including 21 CFR Part 11 Administration Guide* . Table Auditing may be turned on again after the upgrade has been completed.

Technical Considerations for Applications Upgrade to a 64-bit version of 9.2

This section guides you through the technical considerations before upgrading to the 64-bit versions of JD Edwards EnterpriseOne Applications and Tools Releases or migrating from JD Edwards World to JD Edwards EnterpriseOne.

Note that 64-bit processing is implemented with Applications Release 9.2 and Tools Release 9.2.5. From Tools 9.2.6.1 only 64-bit is supported.

If you are starting with the 9.2 GA Applications Platform Pack CDs, you must use the Applications 9.2 GA Deployment Server CDs. Similarly, if you use One-Click or IBMi Code Current, the One-Click version must match the corresponding version of the Deployment Server CDs.

> **Note:** The considerations described in this section do not replace those in the Upgrade Guides and the *Implementing 64-bit Processing with a 32-bit Deployment Server in JD Edwards EnterpriseOne* learning path.

This section contains the considerations for the following migration paths:

- Upgrade from Xe / ERP8
- Upgrade from 8.9 / 8.10 / 8.11
- Upgrade from 8.12
- Upgrade from 9.0 / 9.1

This section also includes Spec Merge considerations for all From Releases.

After performing the applications upgrade as described in this guide, you must follow the instructions in these learning paths if applicable to your environment:

- Implementing 64-bit Processing with JD Edwards EnterpriseOne: This learning path guides you through the steps required to update your existing JD Edwards EnterpriseOne 9.2 32-bit installation to Tools Release 9.2.6 or later with 64-bit processing.
- Implementing 64-bit Processing with a 32-bit Deployment Server in JD Edwards EnterpriseOne: This learning path guides you through the steps required to update your existing JD Edwards EnterpriseOne 32-bit installation to Tools Release 9.2.5 or later and implement 64-bit processing with a 32-bit Deployment Server.

  > **Note:** The process described in the above learning path only applies through EnterpriseOne Tools Release 9.2.5.x. Beginning with Tools Release 9.2.6, a 32-bit Deployment Server is no longer supported.

JD Edwards EnterpriseOne One-Click Provisioning is only available on these platform and database combinations, for both Oracle Cloud Infrastructure and on-premises:

- Oracle Linux with Oracle database
- Microsoft Windows with Oracle database
- Microsoft Windows with SQL Server database

The equivalent installation for IBM i is IBM i Code Current. For other platforms or databases, you must use the 9.2 GA CDs followed by the upgrade and the migration to 64-bit. See details for each from release below.

Release	GA Date	Premier Support End Date	Extended Support End Date	Direct Upgrade to 9.2	Simplified Upgrade to 9.2	Direct Upgrade to 64 bit	Recommended Path
Xe / ERP8	Sep 2000	Dec 2013	Not available	Yes	No	No	9.2 GA upgrade before migrating to 64 bit
8.9	Sep 2003	Sep 2008	Not available	No	No	No	9.1 GA then Simplified Upgrade to One-Click
8.10	Jun 2004	Jun 2009	Not available	No	No	No	9.1 GA then Simplified Upgrade to One-Click
8.11 / 8.11SP1	Dec 2004	Dec 2009	Not available	No	No	No	9.1 GA then Simplified Upgrade to One-Click
8.12	Apr 2006	Apr 2011	Not available	Yes	No	Yes	One-Click
9.0	Sep 2008	Nov 2015	Not available	Yes	No	Yes	9.0 Update 2 then Simplified Upgrade to One-Click
9.0.2	Nov 2010	Nov 2015	Not Available	Yes	Yes	Yes	Simplified Upgrade to One-Click
9.1	Mar 2012	Mar 2017	Not available	Yes	Yes	Yes	Simplified Upgrade to One-Click
9.2	Oct 2015		TBD				Keep current

Note: Releases through Xe and 8.11 cannot upgrade directly to a 64-bit version. After you have upgraded and run all conversions, you can upgrade to a 64-bit Tools Release. Do not switch the Deployment Server to 64-bit unless you have completed your final Spec Merge. You can re-run Table Conversions after switching your Deployment Server to 64-bit.

Note: You need to run the TL92x ASI again after upgrading the Tools to 9.2.6.x 64-bit. Many steps are conditioned on which Tools Release you are running. Follow the *Implementing 64-bit Processing with a 32-bit Deployment Server in JD Edwards EnterpriseOne* learning path for details.

Note that if you have to start with the 9.2 GA Install CDs, you must use the 9.2 GA Deployment Server CDs. Similarly, with One-Click and IBM i Code Current, the Deployment Server CDs must match the version of One-Click and IBM i Code Current.

Review the Upgrade Advisor: JD Edwards (JDE) EnterpriseOne 9.2 (Doc ID 2320843.2) which contains the latest advice from My Oracle Support.

Upgrade from Xe or ERP8.0

Before upgrading from Xe or ERP8.0 to 9.2, you must consider the following:

- Tools Release 9.2, 64-bit (Release 22) cannot access Xe specifications. Therefore, the spec merge will not bring forward your custom objects, and the Compare Tools will not work. You must complete the Applications

upgrade to 9.2 with Tools Release 9.2.5.x, including bringing forward your Customizations, before switching to 64-bit.

- Table Conversions work in 64-bit. Therefore, if you are performing repeated data only upgrades, you can migrate to 64-bit during that process.
- Workflow tables also contain specifications and you cannot bring custom workflows directly from Xe after migrating to 64-bit Workflows are moved forward during the TC Workbench.

Note: One-Click and IBM i Code Current only support 64-bit versions, which do not work for the Xe to 9.2 upgrade.

Follow these steps to upgrade from Applications Release Xe or ERP8.0

1. Install 9.2 GA CDs.
2. Install the latest 32-bit Tools Release – currently 9.2.5.5.
3. Install the latest Planner Update.
4. Install the Server Manager Console and the Server Manager Agent.
5. Install the latest Tools Rollup ESU.
6. Install the latest Tools ASI 9.2.x. This step applies the Applications and DLL changes on the Deployment Server needed for compatibility with Tools Release 9.2.5.x.
7. Follow the instructions in this guide for completing the upgrade.
8. You cannot switch the Deployment Server to 64-bit until run the final spec merge on the last path code. After the Deployment Server has been switched to 64-bit, you cannot go back to 32-bit. You can do repeated data upgrades with a 64-bit Deployment Server.
9. You must run the Tools Release 9.2.x ASI again after upgrading the Tools Release to 9.2.6.x 64 bit. Many steps are conditioned according to the Tools Release that you are running. When switching to 64-bit, follow the *Implementing 64-bit Processing with a 32-bit Deployment Server in JD Edwards EnterpriseOne* learning path.

Upgrade from 8.9, 8.10, or 8.11

Before upgrading from 8.9, 8.10, or 8.11, you must consider the following:

You must first upgrade to Applications Release 9.1 and bring forward any custom objects. There is no upgrade path from 8.9, 8.10 and 8.11 to 9.2 (Table Conversion Schedule and Control Table Merges are not available). Table Conversions must be completed in 9.1, as the Table Conversions for 9.1 to 9.2 upgrade will not work on tables in a previous layout. After this process the 9.1 to 9.2 upgrade converts the tables to the current format.

Note: Release 9.2, 64-bit Tools code (Release 22) cannot access 8.9 – 8.11 specifications. You must bring forward all custom objects during the 9.1 upgrade.

Follow these steps to upgrade from Applications Release 8.9, 8.10, or 8.11

1. Install 9.1 GA CDs.
2. Install the latest 32-bit Tools Release, which is currently 9.2.5.5.
3. Install the latest 9.1 Planner Update.
4. Install the Server Console and the Server Manager Agent.
5. Install the latest Tools ASI 9.2.x. This step applies the Applications and DLL changes on the Deployment Server needed for compatibility with Tools Release 9.2.5.x.
6. Follow the instructions in this guide for completing the upgrade.

7. You can't switch the Deployment Server to 64-bit until you run the final spec merge on the last path code. After the Deployment Server has been switched to 64-bit, you cannot go back to 32-bit. You can do repeated data upgrades with a 64-bit Deployment Server
8. You can now perform a Simplified Upgrade or a Traditional Upgrade to 9.2.
9. Use One-Click to deploy IBM i Code Current or use 9.2 GA CDs if your platform is not supported for One-Click. Follow the instructions in the *JD Edwards EnterpriseOne Applications Release 9.2 Upgrade Guide* to upgrade from Applications Release 9.1 to 9.2 for your platform or database.

Upgrade from 8.12

Before upgrading from 8.12, you must consider the following:

One-Click and IBM i Code Current are not intergrated with upgrade logic in them. If you use One-Click, you must export, save, or detach the Business Data and Control Tables of your 8.12 instance, then detach / drop the 9.2 version of these and attach / import / restore your 8.12 version.

Note: Tools Release 9.2, 64-bit (Release 22) can access 8.12 specifications.

Follow these steps to upgrade from Applications Release 8.12:

1. Install 9.2 GA CDs.
2. Install the latest 32-bit Tools Release (Release 22). The delivered DLLs in PLANNER path code are 32-bit.
3. Install the latest Planner Update.
4. Install the Server Manager Console and the Server Manager Agent.
5. Install latest Tools Rollup ESU.
6. Install the latest Tools ASI 9.2.x. This step also applies the Applications and DLL changes on the Deployment Server needed for compatibility with Tools Release 9.2.5.x.
7. For the GA CD install, build a package in PS920 before starting the upgrade. This step loads the files in the DB repository for PS920.
8. At this point you can migrate the Deployment Server to 64-bit if you want or wait until the Upgrade is finished. Follow the instructions in the *Implementing 64-bit Processing with a 32-bit Deployment Server in JD Edwards EnterpriseOne learning path.*
9. Follow the instructions in this guide for completing the upgrade.

Upgrade from 9.0 or 9.1

Follow these steps to upgrade from Applications Release 9.0 or 9.1

1. Install One-Click if it is supported for your platform or database. Otherwise, use GA CDs. Use the JDE_9.2_Simplified_Upgr_Migration_Utility to move your data to the cloud. If you use IBM i Code Current or deploy 9.2 (using One-Click) onto the same machine where you have the 9.1 or 9.0 data, be aware that the One-Click or Code Current logic is not designed for an upgrade. You must export or save your Business Data and Control Tables before you start. Then when the One-Click or Code Current process ends, drop the tables and delete the library for your Business Data and Control Tables and restore your backup or import the data you exported.
2. If you use GA CDs (AIX, Solaris, HP-UX), follow these steps:
    a. Install the latest 32-bit Tools Release. This release is required for compatibility with the PLANNER path code.

b. Install the latest Planner Update.
c. Install the Server Manager Console and the Server Manager Agent.
d. Install the latest Tools Rollup ESU.
e. Install the Tools ASI 9.2.x. This step applies the Applications and DLL changes on the Deployment Server needed for compatibility with 9.2.5.x.
f. Build a package in PS920 before starting the upgrade. This step loads the files in the DB repository for PS920.
g. If you perform a Simplified Upgrade, download the scripts and create a standard package (for example, DV920FA) in your target Central Objects. This step is needed for the Table Conversions. Search on Bug 33784730 in Update Center.
h. If you perform a Simplified Upgrade, change the spec.ini file in your target path code on the Enterprise Server to look similar to the spec.ini file in PS920 except with your path code and your standard package. For example, DV920 and DV920FA. (The layout of the path code folders changed with 9.2.6).

3. If you use One-Click, check that the scripts have created a standard package in your target Central Objects, for example, DV920FA.
4. Follow the instructions in this guide for completing the upgrade.
5. Before building the package, make sure SY920.F00942T.EMDBSRCFLG is set to 2. The One-Click images do not ship the source on the Deployment Server CDs. The only source on the Deployment Server will be your custom BSFNs that were copied forward during the spec merge. Never set SY920.F00942T.EMDBSRCFLG to 0.
6. If you use GA CDs and you are on 9.2.5.x 32-bit, follow the *Implementing 64-bit Processing with a 32-bit Deployment Server in JD Edwards EnterpriseOne* learning path.

Table Conversion Considerations for All From Releases

Note: Turn on UBE and Table Conversion Engine logging before submitting any Table Conversions to the server. In the jde.ini file on the server, change the [UBE] and [TCENGINE] sections as shown below:

```
[UBE]
UBESaveLogFile=1
:
:
[TCENGINE]
TraceLevel=1
```

Follow these steps for Simplified Upgrade with Tools Release 9.2.6.x:

With 9.2.6.1 there was a change to the folder structure of the path code on the Enterprise Server. This change breaks Table Conversions with Simplified Upgrade, as you cannot access the new table specifications on the server.

For One-Click, JDE_9.2_Simplified_Upgr_Migration_Utility downloads have a fix for the issue.

If you perform a Simplified Upgrade starting with the GA Installation CDs, you must download the scripts to create a standard package in the path code you are upgrading. Search for Bug 33784730 on Update Center.

In either case, verify that the `spec.ini` files on the Enterprise Server for your target path code are correct. They should not point to PS920FA. They should look similar to the `spec.ini` file in the PS920 path code, but should point to the path code (for example, DV920FA in DV920).

Follow these steps to perform Table Conversion:

1. If you start from the GA Install CDs, download the scripts to create the standard package in your target path code, for example, DV920FA in DV920. After you install the GA CDs, run the scripts and verify that the package repository tables (for example, DV920.F98710DV920FA) were created.
2. On the Enterprise Server, review the **spec.ini** file in your target path code and verify that it looks similar to the **spec.ini** file in PS920. Also, it must point to the package repository you just created. For Simplified Upgrade, the GA Platform Pack lays down a different **spec.ini** file, which is not applicable for Tools Release 9.2.6.
3. The GA CDs are 32-bit. After you implement 64-bit on the Deployment Server, you must copy the bin64 from PLANNER to each of the path codes. Additionally, you must copy the 64-bit **glbltbl**, **dddict**, and **ddtext** files from **PLANNER\spec** to each path code's spec directory. Without these files, no Table Conversions (including *ALTER in ESUs) can run.

Preparing the Prototype Environment

To make sure you retain all modifications from your prototype environment:

1. Make sure the network services *JD Edwards EnterpriseOne* network services are running on the Enterprise Server.

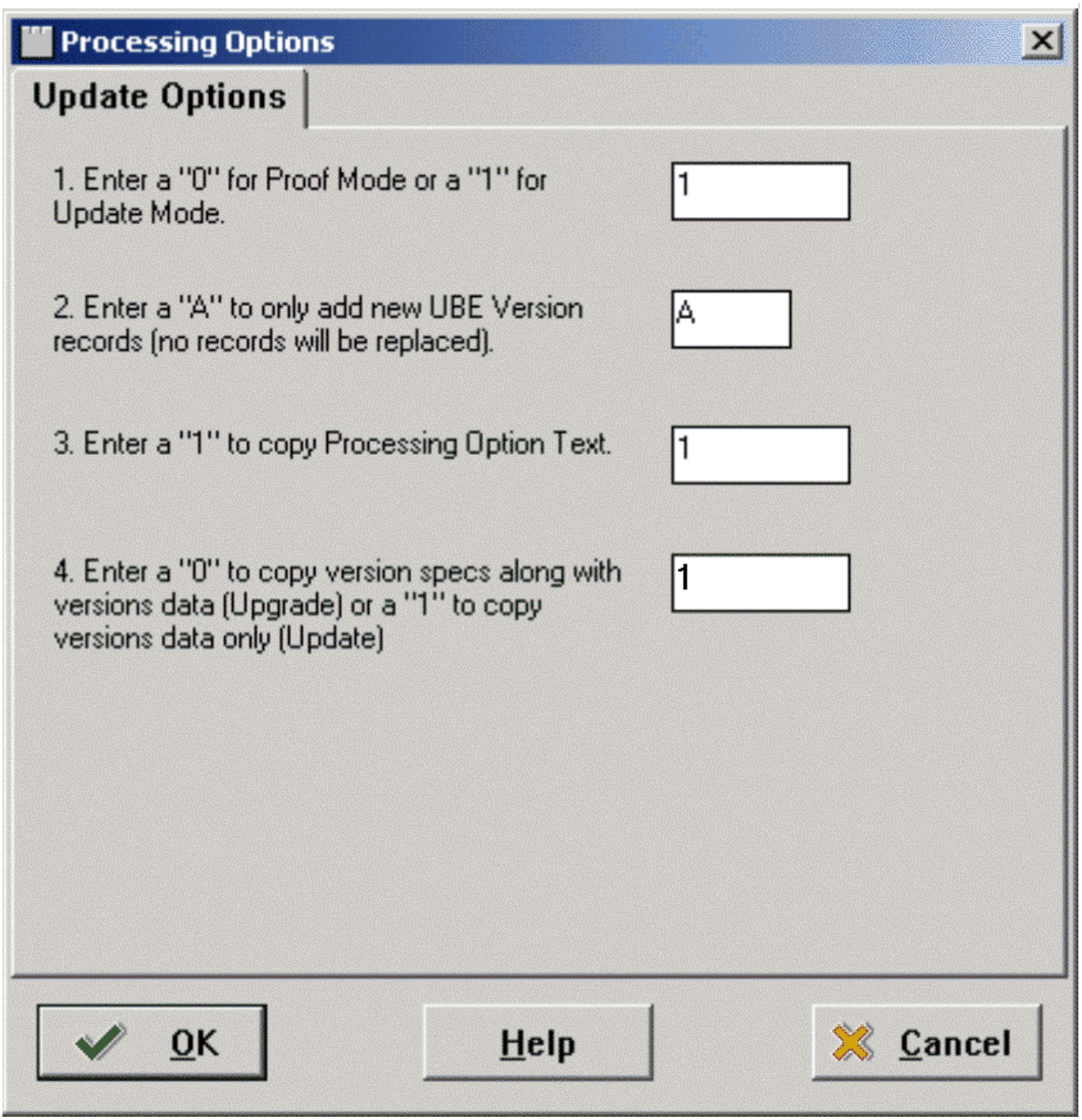
   > **Note:** The service names will be prefixed with JDE for releases prior to 8.9 and after 8.11, while the prefixed will be PSFT for releases 8.9, 8.10, and 8.11.

2. From the System Administration Tools menu (GH9011), select Batch Versions.
3. Transfer PD versions to prototype so the two environments are the same.
4. Run R9830512.
5. Select ZJDE0001 and click Copy.
6. Create a new version name and a new version title.

   Leave security set at 0.
7. To select the new version on the version prompting form, check the Data Selection box.
8. Select the advanced options to bring up the Advanced version prompting form and select to Override Location.
9. Click Submit.
10. When prompted for the override location, select LOCAL.
11. Modify the data selection logic like this:

```
where BC Version History (F983051) is not equal to "XJDE0000-XJDE9999",
and BC Version History (F983051) is not equal to "XJDEAAAA - XJDEZZZZ"
```

12. When prompted to enter processing options, ensure that they are set at 1, A, 1, and 1, as shown on this screen:


Processing Options
Update Options
1. Enter a "0" for Proof Mode or a "1" for Update Mode.
1
2. Enter a "A" to only add new UBE Version records (no records will be replaced).
A
3. Enter a "1" to copy Processing Option Text.
1
4. Enter a "0" to copy version specs along with versions data (Upgrade) or a "1" to copy versions data only (Update)
1
OK
Help
Cancel

13. Click the **OK** button on printer selection.
14. Click the **OK** button on Processing Options.
15. Build a prototype package. This package can be used later to verify that your custom versions were upgraded properly.
16. Deploy the prototype package to Development Clients. Run the release you are upgrading from, for example, B7333.

See Also

Transferring Objects and *Package Build* in the *JD Edwards EnterpriseOne Tools Package Management Guide* for more specific instructions about building and deploying packages.

Preparing the Development Environment

If you do not have a development environment, you can skip this procedure.

> **CAUTION:** For your initial upgrade, do not select the *DV920* environment as the target of the upgrade if you are upgrading a copy of your production data. The Development (DVxxx) environment defaults to loading demo data during the upgrade, so loading using the upgrade installer would result in a mixture of your data and the JD Edwards EnterpriseOne demo data in some of your tables.

To make sure you retain all modifications from the previous development environment:

1. Make sure that all work in progress is checked into the development pathcode.

   > **CAUTION:** From a Development Client, use Object Management Workbench, or your own query or report, to verify that objects are not checked out. Also, verify that no objects are checked out to individual Development Clients. Any modifications that are checked out will not be carried forward to the new release.

2. Build the development package in preparation for deployment to one or more Development Clients.
3. Deploy the development package to one or more Development Clients.
   These Development Clients are used later to help verify that all custom modifications were carried forward to the new release.

   > **CAUTION:** You cannot make any modifications to the environment you are upgrading (except changes to custom business functions written in C language), and still carry them forward to the next release.

See Also

Transferring Objects and *Package Build* in the *JD Edwards EnterpriseOne Tools Package Management Guide* for more specific instructions about building and developing packages.

Preparing the DB2 for Linux, UNIX, and Windows Database for Table Conversions

The upgrade process requires specific database preparation to account for the various CPU-bound and data size requirements. It is important to note that during execution of the Table Conversion Workbench you will need sufficient

disk space to accommodate two copies of tables being converted. To account for this disk space requirement, you should identify the four largest tables which you plan to convert, determine their current size, and multiple that by two.

For example, the following table shows a hypothetical environment where the largest tables are F0911, F42199, F42119, and F41021.

Largest Tables	Existing Size (see Note)	Existing Size Doubled
F0911	120 MB	240 MB
F42199	80 MB	160 MB
F42119	90 MB	180 MB
F41021	56 MB	112 MB
Total Amount of Space Required to Run Tables Conversions		**692 MB**

Note: This includes the size of the table and all unique indexes on that table. That is, if *N* is the number of concurrent jobs in the TC Workbench, then the Temp disk space should be as large as the *N* largest tables combined, including all indexes.

For *DB2 for IBM i* databases, ensure that:

- Your *IBM i* machine is running the supported OS version and latest database PTFs as detailed in the MTRs for *JD Edwards EnterpriseOne* . Refer to *Accessing Certifications*.
- You do *not* enable journaling during the conversion.
- Your Deployment Server is running with the latest iSeries Access PTF.

Checking Modification and Merge Flags

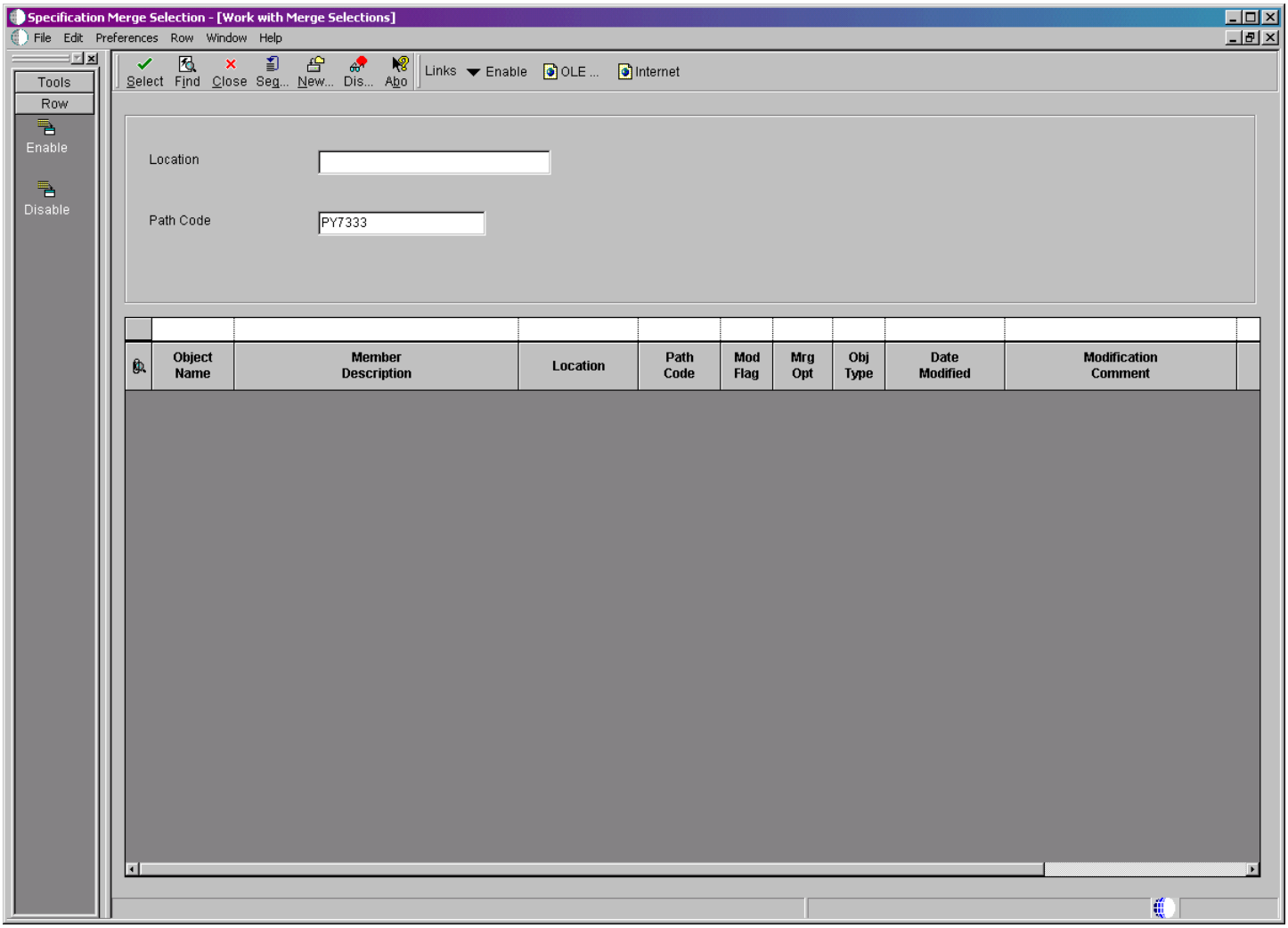
This task ensures that your modifications are carried forward to the new release. Before you upgrade, perform the steps to review or set the modification flags on the Object Librarian records for all modified objects.

CAUTION: Do not run the Specification merges until you check the flags for all pathcodes containing modified objects.

To check modification and merge flags:

1. Logon to the Development Client or to the deployment environment on the Deployment Server.

2. On the menu (GH9611), select Specification Merge Selection.


Specification Merge Selection - [Work with Merge Selections]
File Edit Preferences Row Window Help
Tools
Row
Enable
Disable
Select Find Close Seg... New... Dis... Abo
Links Enable OLE ... Internet
Location
Path Code
PY7333
Object Name
Member Description
Location
Path Code
Mod Flag
Mrg Opt
Obj Type
Date Modified
Modification Comment

3. On the Specification Merge Selection form, complete these fields:
   - *Location*

     Enter the name of the Deployment Server that is the check-in location for this pathcode.
   - *Path Code*

     Enter the name of the associated pathcode (prototype or development).
4. On the QBE line, enter *C* in the Mod Flag field to list the changed objects, and then click Find.
5. Set the MrgOpt field to *1* for all objects except those you do not want to merge; use Enable to carry changed objects and use Disable to not carry changed objects.
6. When you finish reviewing or modifying the records, click Close.

> **CAUTION:** To verify the accuracy of included modifications, additional queries are strongly recommended to avoid missing any modified objects. For example, verify that the system code of the objects is 55 to 59.

Changing the Journal

JD Edwards EnterpriseOne Release 9.2 uses LOB data in different native LOB data types - BLOB, CLOB, etc. The JRN and JRNRCV must have new attributes defined in them to handle the LOB data types, where JRN and JRNRCV in the previous release cannot handle the LOB data types. The Platform Pack Installer changes the journal attributes using this command:

```
RCVSIZOPT(*MAXOPT2)
```

After the upgrade process completes, ensure the old STRJOURNAL *PGM object has been replaced with the new one in *JD Edwards EnterpriseOne Release 9.2* .

Refreshing and Verifying Data

Before running Installation Workbench, you have the option to refresh the business data for the environment being upgraded with a current set of Production data. Having a recent copy of the data makes testing table conversions and the new release more effective. For example, when you upgrade the development environment, refresh *Business Data - TEST* ; and when you upgrade the PY environment, refresh *Business Data - CRP* .

The source can be any data set you choose, but you should use a current copy of your production data. When table conversions run during Installation Workbench, this data is converted to the new *Release 9.2* formats, as required. By using a copy of your production data, you ensure a successful upgrade of your live production data later.

This section discusses:

- *Refreshing the Business Data*
- *Deleting SQL Packages*
- *Refreshing the Control Tables*
- *Verifying Custom Changes in Master Control Tables*
- *Backing Up the Servers and Databases*

- *Working with Purge Tables*
- *Working with Accounts Payable Processing*

Refreshing the Business Data

To copy your business data, you must add a version of R98403 that is similar to XJDE0021 from a B73.3.x or B9 Development Client, and then run it in proof mode to make sure the data selection and processing options are set correctly.

To refresh the business data:

1. From the System Administration Tools menu (GH9011), select Batch Versions.
2. In the Batch Application field, enter R98403.
3. Click Find.
4. Run your version (the one that is similar to XJDE0021).
5. On the Processing Options `Environment` tab, verify the processing options.
6. Click OK.
7. After running the batch application in proof mode, run in update mode to recreate the existing tables.

   Because User-Defined Code (UDC) and menu merges are customer-based, copy them from the production environment to the PY environment. If upgrading the development environment, consider refreshing the development environment control tables from production environment to test the software.

   Before running Installation Workbench to upgrade the prototype or development environment, copy the current production environment control tables (Control Tables - Production) to the *Control Tables - Test* or *Control Tables - CRP* data source, depending on the environment to upgrade. This makes sure that your master control tables are used when the upgrade merges run during Installation Workbench.

Deleting SQL Packages

On the *IBM i* , you must delete existing SQL packages. You must do this before signing onto the software on the Deployment Server. Use these steps to delete the existing SQL packages:

1. STRPDM
2. Choose Option 2 with this criteria:
   - Library: <data library>, for example CRPDTA
   - Name: *ALL
   - Type: *SQLPKG
3. Choose Option 4.
4. Press Enter

Refreshing the Control Tables

To refresh the control tables:

1. From the previous release's planner environment, you must map tables for the environment being upgraded as shown in the list below. For example, for DV733x, map these tables to the *Control Tables - Test* data source.

F0004
F0004D
F0005
F0005D
F0082
F00821
F0083
F0084
F9100
F9101
F9102
F9105
F9105D
F9106
F9106D
F9050
F9010
F9020
F9021
F9022
F9023
F9025
F9030
F98840
F91011
F91012
F91013
F91014
F98810D
F98811
F98830
F98845
F98800
F98800D
F98800T
F98810

2. From the System Administration Tools menu (GH9011), select Batch Versions.
3. In the Batch Application field, enter R98403.
4. Click Find.
5. Run version XJDE0022 locally.
6. On the Processing Options Environment tab, verify the processing options are set to 1, 1, A, and 1.
7. Click OK.
8. Deactivate the mappings you defined for the tables listed in Step 1.
9. Reactivate the original mappings.

You must verify that your master control tables for release level B73.3.x or B9 include all custom changes you want to carry forward to *Release 9.2* . Verify them for each environment you want to upgrade.

Verifying Custom Changes in Master Control Tables

To verify custom changes in master control tables:

1. Verify that the previous release's master control tables for the data dictionary reside in a relational database accessed by the Data Dictionary data source:
    - F9200
    - F9202
    - F9203
    - F9207
    - F9210
    - F9211
    - F9212
    - GT92002 (F00165)
2. Verify that the previous release's master control tables for menus reside in a relational database accessed by the Control Tables - Production data source (for production), *Control Tables - CRP* (for PY environments), or *Control Tables - Test* (for the development environment):
    - F9100
    - F9101
    - F9102
    - F9105D
    - F9106D
3. Verify that the B73.3.x or B9 master control tables for user defined codes reside in a relational database accessed by the Control Tables - Production data source (for production), *Control Tables - CRP* (for PY environments), or *Control Tables - Test* (for the development environment).

Backing Up the Servers and Databases

This section discusses:

- *Backing up the Deployment Server*
- *Backing Up the Enterprise Server*
- *Backing Up the Oracle Databases*

Backing up the Deployment Server

The Deployment Server must be completely backed up, because some *JD Edwards EnterpriseOne* objects exist in directories other than normal *JD Edwards EnterpriseOne* structures.

Backing Up the Enterprise Server

Prior to beginning the upgrade, you should back up the complete directory structure for the *JD Edwards EnterpriseOne* base installation.

To back up your *IBM i* -based Enterprise Server:

1. Save all data libraries that contain *JD Edwards EnterpriseOne* tables using the SAVLIB command.
2. Save all *JD Edwards EnterpriseOne* system libraries using the SAVLIB command.
3. Save the specifications for all pathcodes using the SAV command.

Backing Up the Oracle Databases

To back up your Oracle databases:

1. Fully export all instances (one at a time).
2. Perform a cold back up of the complete Oracle database.

Working with Purge Tables

These tables have changed format from *Release 9.2* :

- F3111S
- F3112S
- F31122S

The upgrade process will drop and recreate these tables. These are Purge tables, and the upgrade process does not preserve the data in purge tables.

Working with Accounts Payable Processing

If you are upgrading, you must use the Work with Payment Groups application (P04571) to reset or finish (write and update) all accounts payable processing. The Financials department or financials consultant can assist you with this task.

> **Note:** Failure to accomplish this task causes data corruption in accounts payable processing files. To verify that no unfinished accounts payable processing records exist, tables F04571 and F04572 should both be empty.

Verifying Software and Hardware Requirements

Certain minimum hardware and software requirements must be met to run *Release 9.2* on various operating systems and servers. Verify that the Deployment Server, Enterprise Servers, and Development Clients meet the hardware and software requirements.

Because the software and hardware requirements change rapidly as manufacturers constantly update their products, requirements are not provided in this documentation. Refer to *Accessing Certifications*.

Note: Make sure that you have taken and installed the latest Planner Update ESU from the Oracle JD Edwards Update Center. Failing to do so may prevent proper installation of the software. Additionally, a new compiler requirement is added for *Release 9.2* . Before you run the Deployment Server or Platform Pack installer, you should install a Microsoft Visual C++ compiler on any machine on which the installer will be run. The MTRs list supported C++ compilers on Microsoft Windows-based machines. Refer to *Accessing Certifications*

Adding a New Entry to the QAQQINI File

Once you have put the latest PTFs onto the *IBM i* , you need to enable the new LOB locator functionality. If you do not do this, Specifications Merge and Package Build will fail.

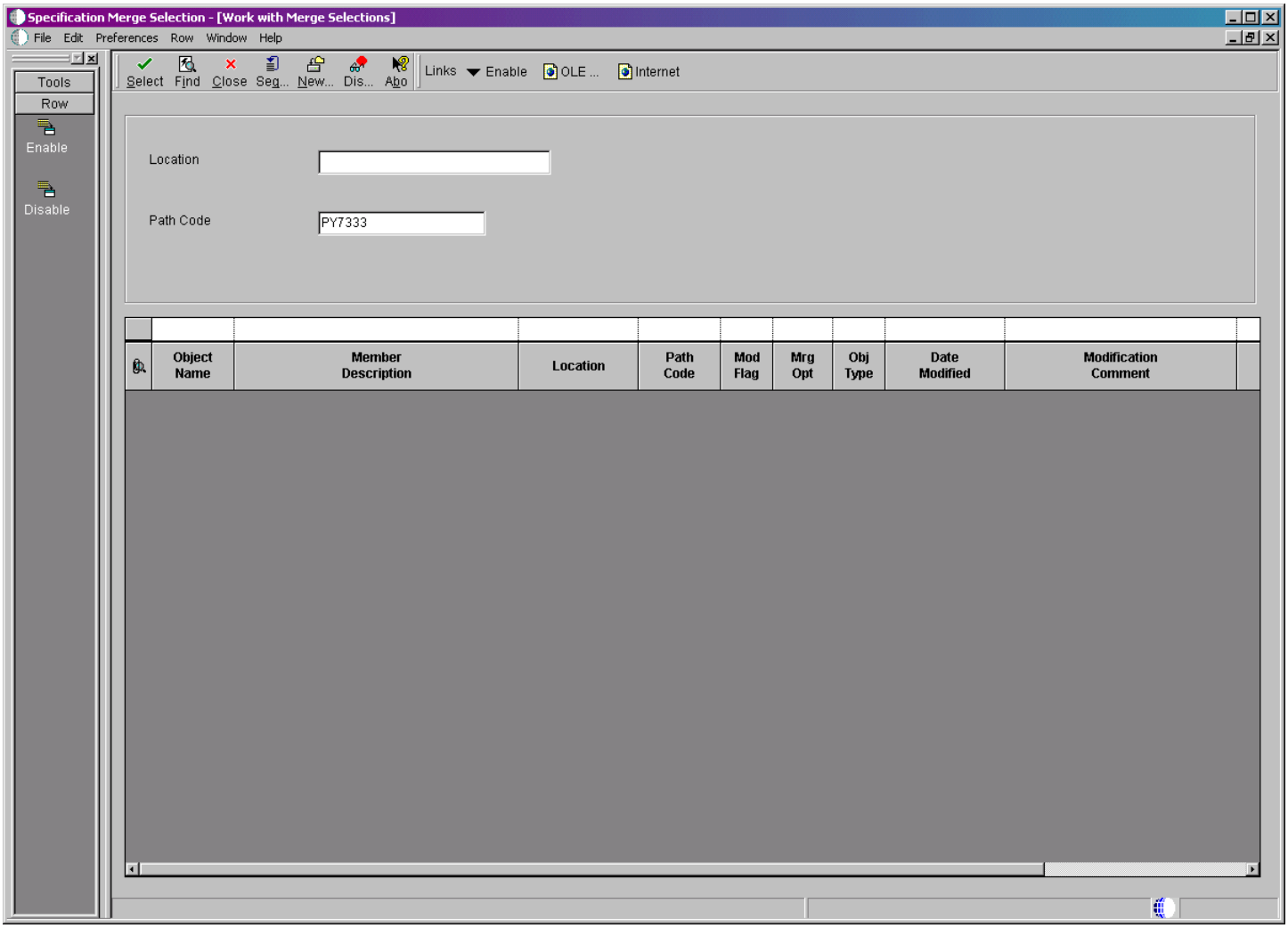
1. Open the `QAQQINI` file on the Enterprise Server using this command:

   ```
   WRKOBJ QUSRSYS\QAQQINI *FILE
   ```

2. If the `QAQQINI` file does not exist, add it using this command:

   ```
   CRTDUPOBJ QAQQINI QSYS *FILE QUSRSYS DATA(*YES)
   ```

3. Start *IBM i* Navigator.


Specification Merge Selection - [Work with Merge Selections]
File Edit Preferences Row Window Help
Tools
Row
Enable
Disable
Select Find Close Seg... New... Dis... Abo
Links Enable OLE ... Internet
Location
Path Code
PY7333
Object Name
Member Description
Location
Path Code
Mod Flag
Mrg Opt
Obj Type
Date Modified
Modification Comment

4. Navigate the *Databases* node and then expand to show your machine name.
5. Right click on your machine name and select Run SQL Scripts.
6. Run these SQL commands:

   ```
   SELECT * FROM QUSRSYS.QAQQINI
   ```

   In the results, you should search for this entry:

   ```
   LOB_LOCATOR_THRESHOLD
   ```

   If the `LOB_LOCATOR_THRESHOLD` entry does not exist, you should insert it by running this command:

   ```
   INSERT INTO QUSRSYS.QAQQINI VALUES('LOB_LOCATOR_THRESHOLD','10000', default)
   ```

   If the `LOB_LOCATOR THRESHOLD` entry does exist, you should ensure that the value for `QQVAL` is set to `10000`. If the `QQVAL` value is set to anything other than `10000` (for example, `*DEFAULT`), you must change it using this command:

   > **Tip:** If you have`STRSQL`, you can also run this command directly from that program.

   ```
   UPDATE QUSRSYS.QAQQINI SET QQVAL='10000' WHERE QQPARM='LOB_LOCATOR_THRESHOLD'
   ```

7. Sign out of the *IBM i* Navigator and make sure the `QZDASOINIT` job is terminated. This is required because a new database connection must be started with the new values for `QZDASOINIT`.

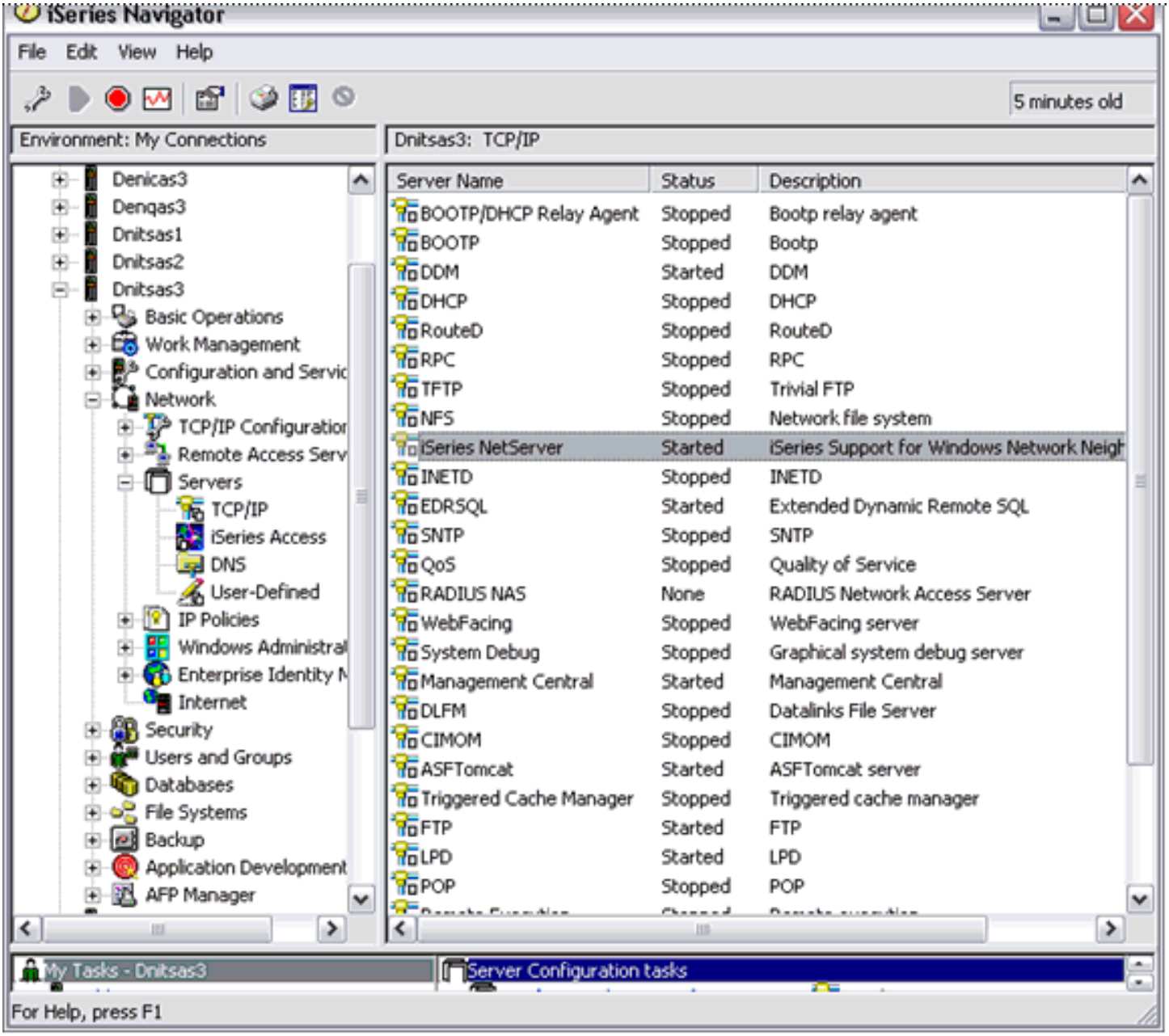
Setting up Your IBM i

This section contains these tasks:

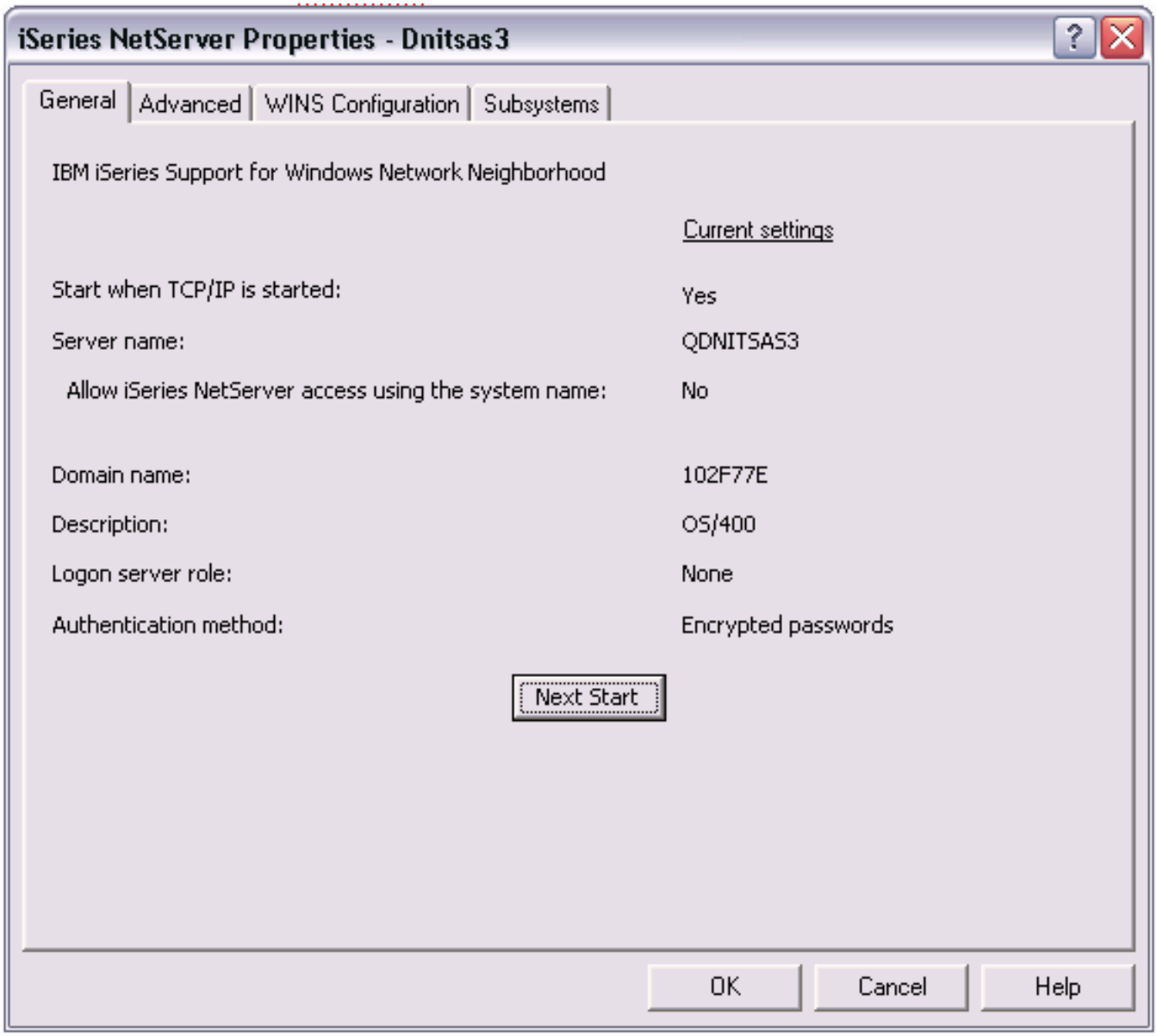
- *Setting Up AS\400 TCP\IP Services*
- *Setting Up a Network Share for Root*
- *Starting the EDRSQL Service*

Setting Up AS\400 TCP\IP Services

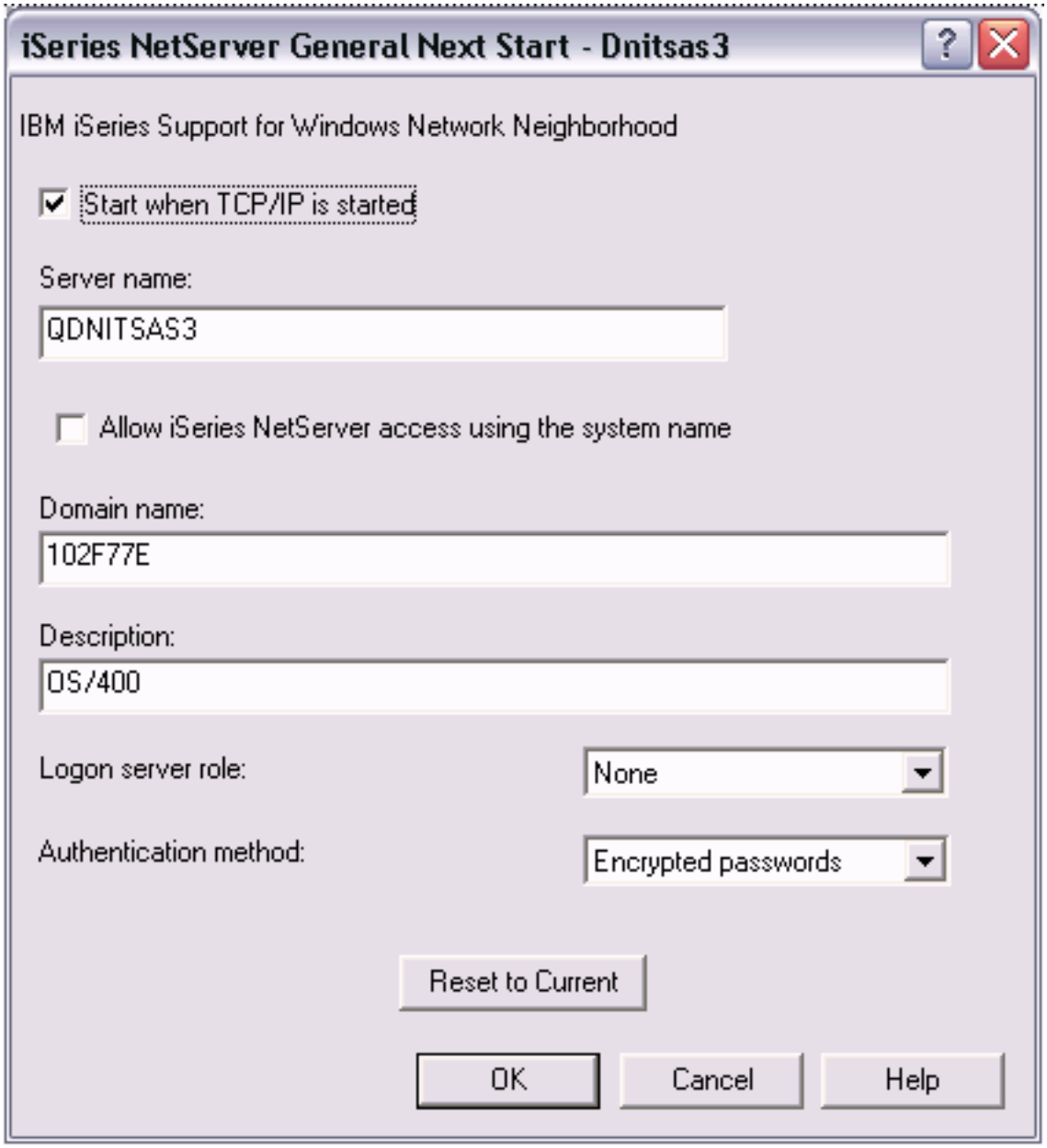
Use this procedure to set up the TCP\IP services on your *IBM i* .



1. In *IBM i* Navigator, open the node for your *IBM i* machine and drill down to Network | Servers | TCP\IP and right click on *IBM i* NetServer, and select Properties.


iSeries NetServer Properties - Dnitsas3
General
Advanced
WINS Configuration
Subsystems
IBM iSeries Support for Windows Network Neighborhood
Current settings
Start when TCP/IP is started:
Yes
Server name:
QDNITSAS3
Allow iSeries NetServer access using the system name:
No
Domain name:
102F77E
Description:
OS/400
Logon server role:
None
Authentication method:
Encrypted passwords
Next Start
OK
Cancel
Help

2. On *IBM i* NetServer File Share Properties - *<machine_name>*, click the Next Start button.



3. On *IBM i* NetServer General Next Start - *<machine_name>*, click to enable the checkbox for this setting:
   `Start when TCP\IP is started`
4. Click OK to close the General Next Start dialog, and then click OK again to close the NetServer Properties dialog.

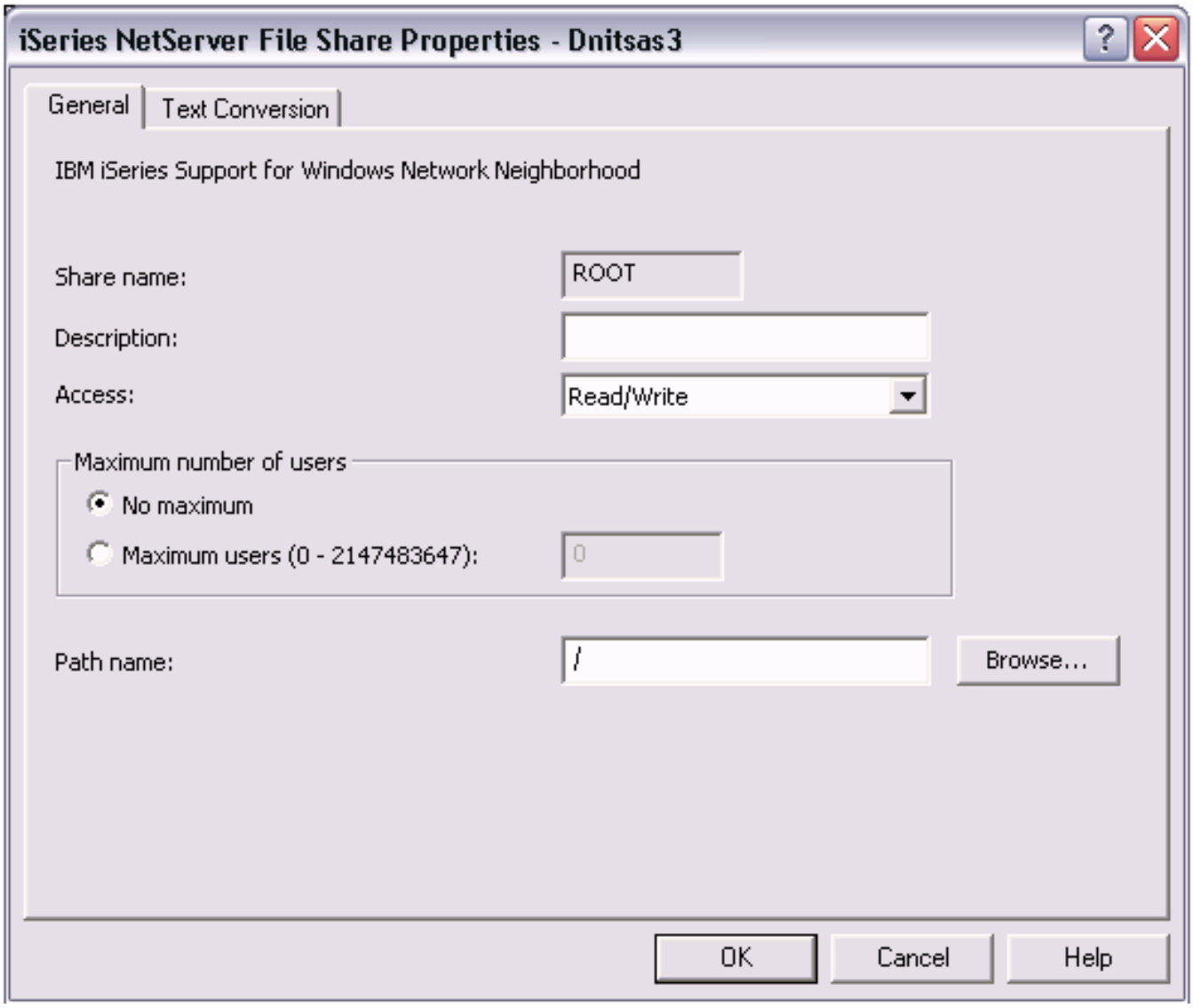
Setting Up a Network Share for IBM i Root

Use this procedure to set up a network share on your *IBM i* root.

1. Start *IBM i* Navigator
2. Expand your machine in the tree.
3. Drill down into the *Network* node.
4. Drill down into the *Servers* node.

5. Highlight *TCP\IP*.
6. In the right hand panel find *IBM i* NetServer.

   If it has a status of Stopped, right click and start it.
7. Double click on the started *IBM i* NetServer.

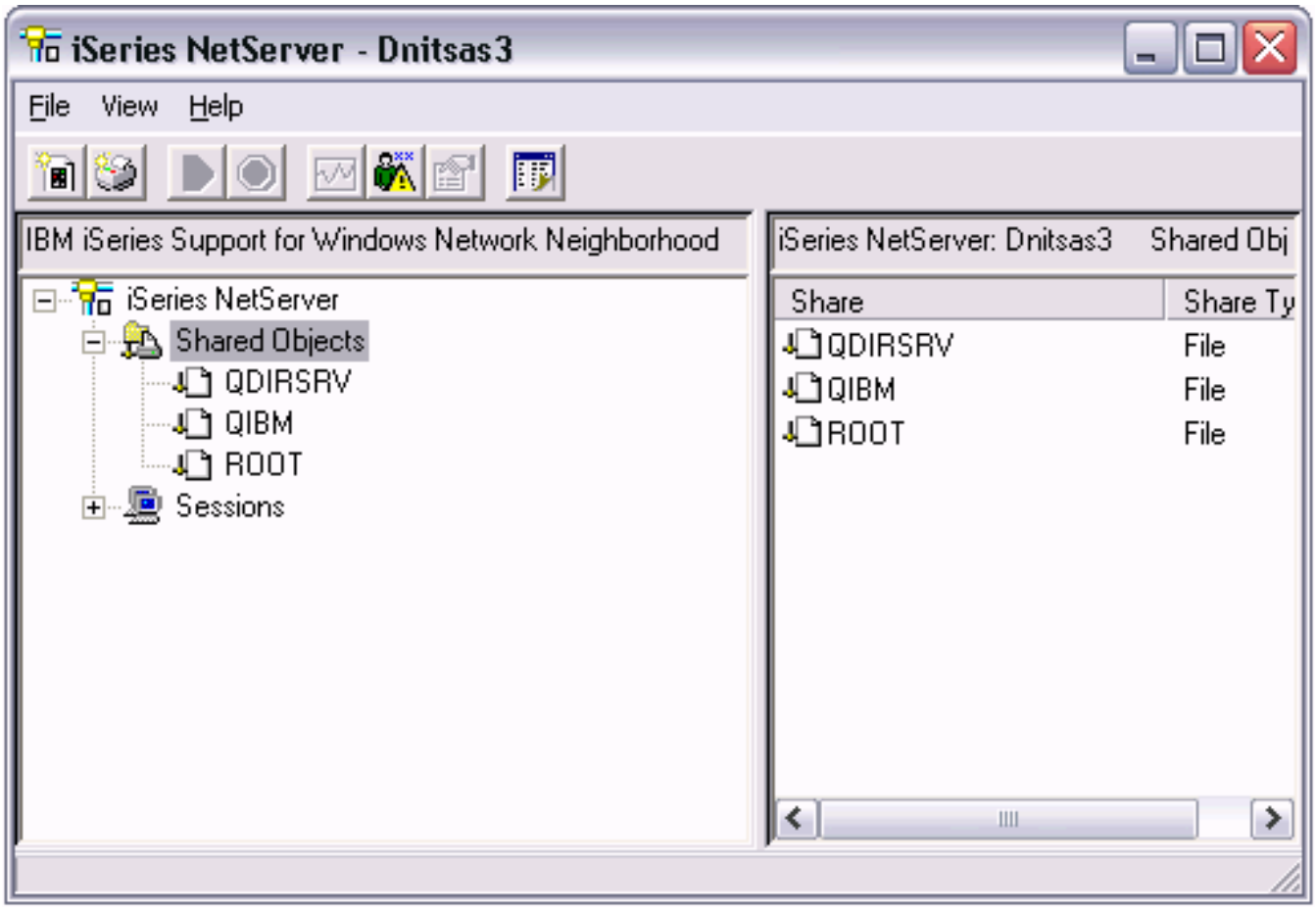


8. Navigate from File | New | File and complete these fields:
   - *Share Name*

     Enter this value: *ROOT*
   - *Description*

     Enter the Root directory in IFS.
   - *Access*

     Use the pulldown to choose Read\Write.
9. On *IBM i* NetServer - File Share Properties <*machine_name*>, click OK.

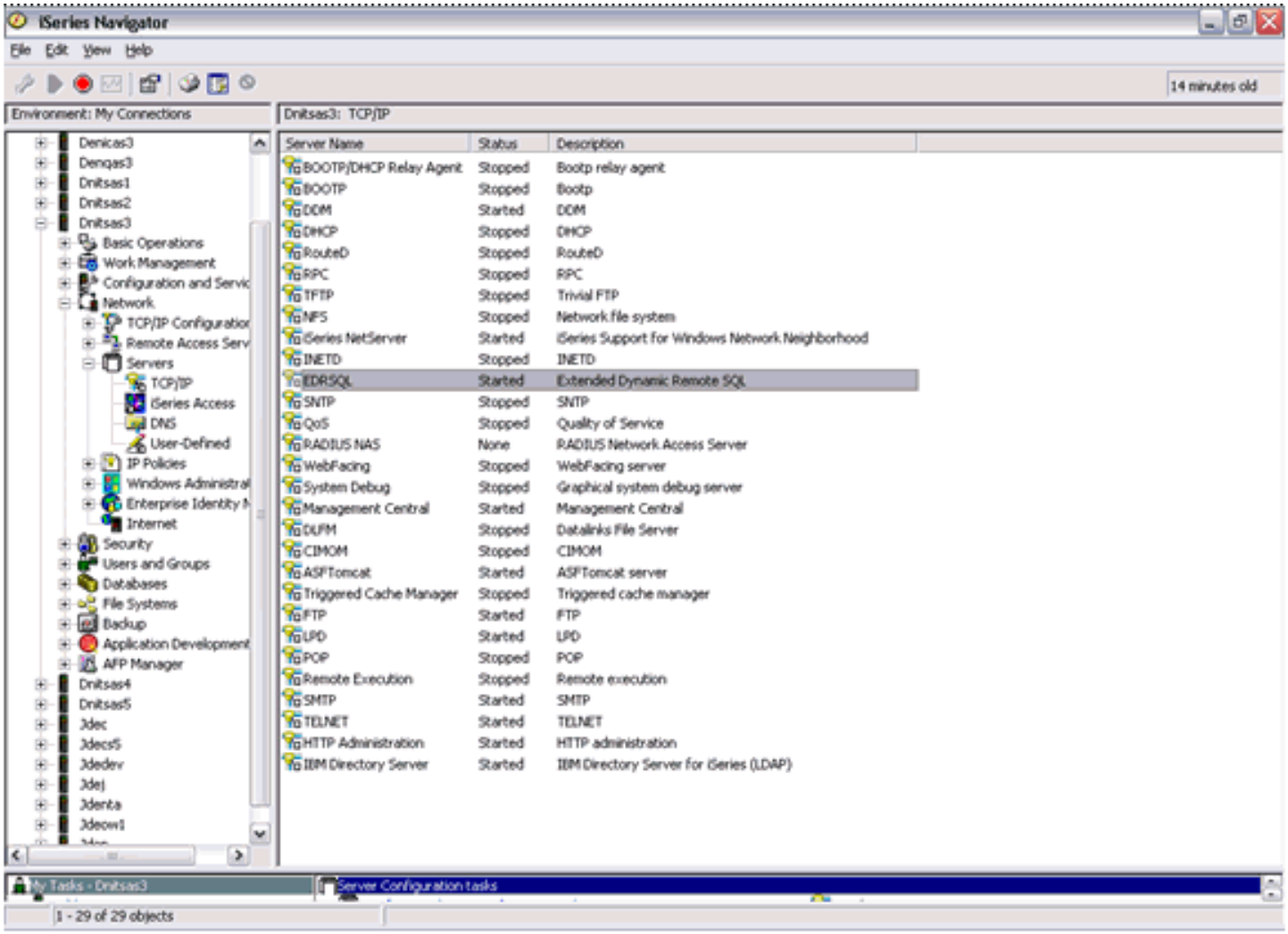


10. On *IBM i* NetServer File Share Properties, right click on Root and go to properties and make sure that Access is set to *Read\Write*.

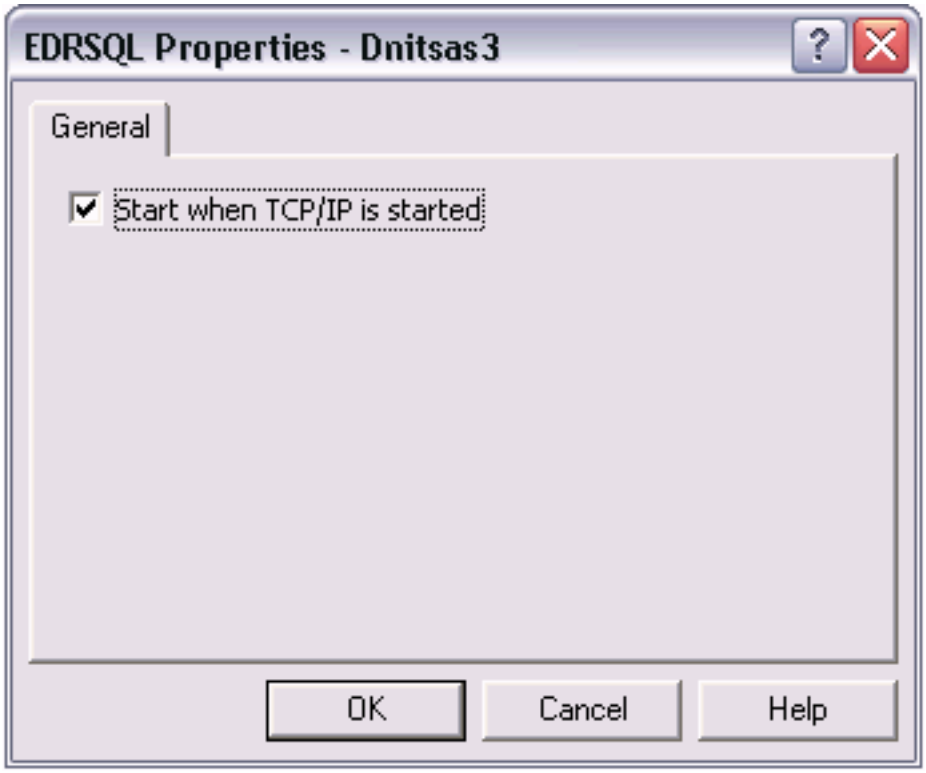
    Note: The default value is Read only.
11. Click OK to save the Read\Write setting.

Starting the EDRSQL Service

Tip: Alternatively, instead of using *IBM i* Navigator as detailed in this procedure, you can logon to a TN5250 session as QSECOFR and invoke this command: `STRTCPSVR SERVER(*EDRSQL)`



1. On *IBM i* Navigator, while still on Network | Servers | TCP\IP, right click on EDRSQL, choose Properties.



2. On Setting Up AS\400 TCP\IP ServicesEDRSQL Properties, click in the checkbox to enable this setting:
   `Start when TCP\IP is started`

Verifying the Disk Space Requirements

The amount of disk space you need for *Release 9.2* software on the Deployment Server and Enterprise Server depends on many variables according to platform and database. For the Deployment Server, all disk space must be available on one drive *except* if you use the Remote Share option. With the Remote Share option, there must be enough room on one remote share for all the path codes. For Enterprise Server installation, multiple foundations during the install are not supported. There must be enough space on one disk drive for all logic components.

During the install you *cannot* choose to have Printqueue and build areas installed onto another location. Additionally you must have sufficient disk space on either the Enterprise Server or a separate Database Server for the scripts and the database components.

After you have completed an installation, you can manually relocate some components of the Enterprise Server on different drives, such as printqueue location, build areas, package location, and BI-Publisher storage. Additionally, when using multiple foundations it is possible to use different drives for each set of JD Edwards EnterpriseOne pathcodes. However, it is important to note that for purposes of the initial installation, having the correct amount of space available, but not on a single drive, is not adequate. Up-to-date disk space requirements are listed in the *Release 9.2* Minimum Technical Requirements. Refer to *Accessing Certifications*.

Note: While the disk space tables accurately represent the disk space requirements, the actual requirements for an installation will be greater due to the requirement for temporary space.

Cleaning Up Disk Space on the Servers

Make sure you have enough disk space before starting the upgrade. You may delete some directories from previous releases to increase space on your system.

> **Note:** Parallel Release Considerations If you want to maintain the recommended parallel environments, and if you have sufficient disk space, you should keep your complete prior release directory structure intact, such as B733.x and B9. To run parallel, you must keep at least the CLIENT, PLANNER and DATA, PLANNER and SPEC, pathcode, and SYSTEM directory structures. Path Code Considerations If you use the JD733x pathcode, or any packages associated with it, do not delete the JD733x directory structure. However, if the directory is only a copy of the *JD Edwards EnterpriseOne* pristine objects for a previous release, you can delete it.

See Also

Verifying Software and Hardware Requirements

Verifying the Disk Space Requirements

Applying Microsoft Product Updates

You should apply all the critical updates for Microsoft on your Deployment Server including Visual C++.

> **Tip:** If you already have the required components installed, you can install Microsoft .NET without prompting for the prerequisite installation image by entering this command line: `x:\setup\setup.exe \NO_BSLN_CHECK` where x: is the drive on which the .NET setup program resides.

3 Working with the Deployment Server

Understanding the Deployment Server

This section describes these topics:

- *Overview of the Deployment Server*
- *Installation Process Flow*
- *Understanding Destination Paths*

Overview of the Deployment Server

The Deployment Server for JD Edwards EnterpriseOne must reside on an Intel x86-based computer running Microsoft Windows. The JD Edwards EnterpriseOne software installation and upgrade programs enable you to create and maintain installation plans and deploy *Release 9.2* to the Enterprise Servers and Development Clients.

The Deployment Server installation program is based on the Oracle Universal Installer (OUI). You can use the OUI to install the JD Edwards EnterpriseOne Deployment Server fully on a local machine, or you can install the Deployment Client portion on a local machine and the Deployment Server portion or a remote machine.

This installation includes attaching and importing the Planner tables into the local database on the Deployment Server.

For Release 9.2, only the Oracle Enterprise Edition (OEE) database is supported as the local database on the Deployment Server.

> **Note:** The Deployment Server requires the Microsoft Visual Studio 2013 Run Time. Refer to the section of this guide entitled: *Working with Microsoft Windows Visual Studio and Windows SDK*.

A local Oracle database must exist before you can run the OUI-based Deployment Server installer. The JD Edwards program called InstallManager is used to start the installation of the local Oracle database.

No separate end-user licensing is required for installation of the local Oracle database. It should be noted, however, that the installed Oracle database is not fully functional relative to the commercial versions of the Oracle databases that are available.

If you are planning on using an existing machine with an existing installation of JD Edwards EnterpriseOne, it is recommended that you use SnapShot to preserve your existing release environment. Refer to the **Caution** in the section of this chapter entitled: *Prerequisites*.

For additional considerations, refer to *Local Oracle Database Considerations*.

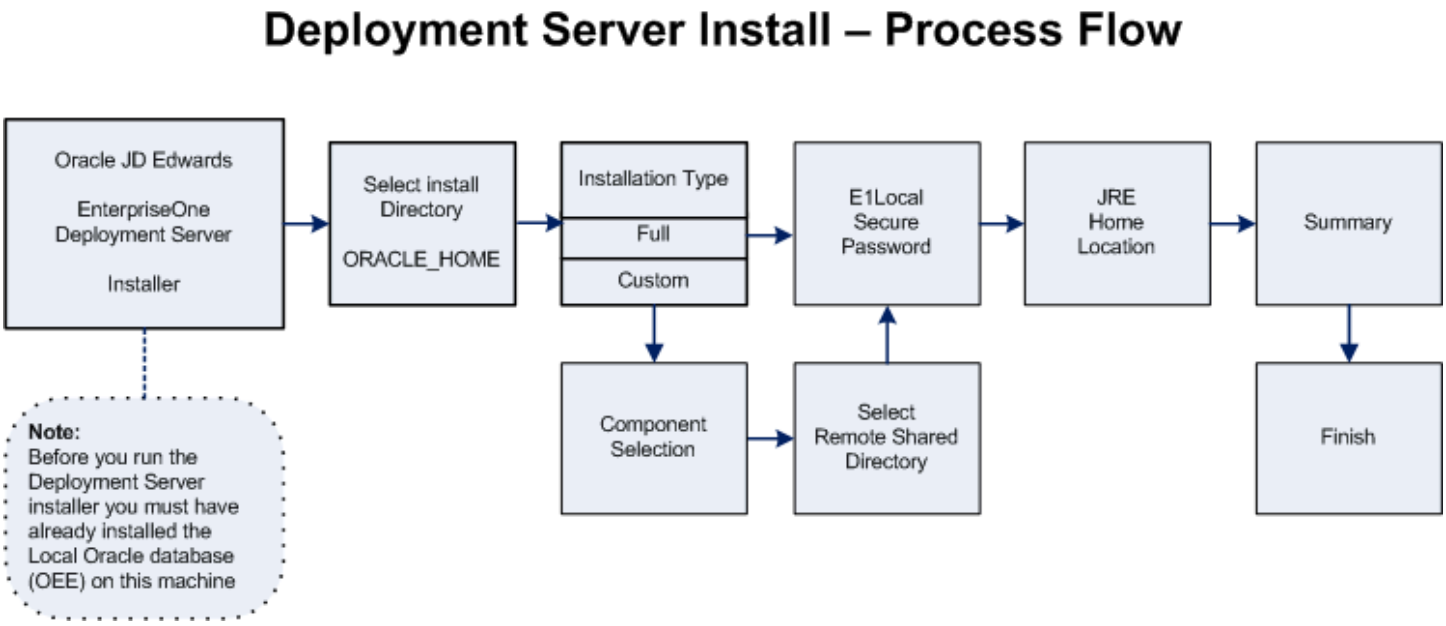
CAUTION: If you are upgrading to JD Edwards EnterpriseOne Applications *Release 9.2* , this is the order in which you should proceed:

1. Install the Deployment Server as described in *Working With the OUI Installer to Install the Deployment Server*.
2. Install the latest Tools Release as described in *Using Server Manager to Install the Tools Release*.
3. Install the latest Planner Update ESU on the deployment server and run special instructions as described in *Installing the Latest Planner Update and Running the Special Instructions*.
4. Run the Workbench on Pristine environment as described in *Working With Installation Workbench*.
5. Apply the Planner Update ESU to the Pristine environment.
6. Build a full package as described in the *JD Edwards EnterpriseOne Tools Package Management Guide* .

Note: If you are upgrading to Release 9.2 and your Deployment Server is a different machine than the previous release, you must map a drive to the previous release machine so that the spec merge can run successfully.

Installation Process Flow

The diagram below illustrates the process flow and the various installation paths.



Understanding Destination Paths

Each Oracle product that is installed on a machine has what is termed an **Oracle Home** directory or path. This is a directory that contains all the files associated with the product. This path has a name as well. You can specify a name that is intuitive so you do not have to remember the path.

When you install the JD Edwards EnterpriseOne Deployment Server, you specify an **Oracle Home** and name for that installation as well. For example, you may enter `C:\JDEdwards\E920` as the Oracle Home path and **JDE DEP920_HOME** as the Oracle Home name. Following this example, your **Oracle Home** on the Deployment Server would be:

Oracle Home Path	Oracle Home Name	Comment
`C:\JDEdwards\E920`	**JDE_DEP920_HOME**	This is the **Oracle Home** of the Deployment Server

Pre-Installation Considerations and Requirements

This section discusses these topics:

- *Local Oracle Database Considerations*
- *Installing the Local Oracle Database on the Deployment Server*
- *Installing a 32-Bit Oracle Database Client*
- *Working with Microsoft Windows Visual Studio and Windows SDK*
- *Microsoft Windows Internet Protocol Version 4 (IPv4)*
- *Install the Java Runtime Engine (JRE)*
- *Working with JDBC Drivers on the Deployment Server*

Local Oracle Database Considerations

The Deployment Server installer includes the Oracle 12c database for local use by the Deployment Server. The installation includes GUI tools for database administration.

> **CAUTION:** Because the Deployment Server installer must have access to a local Oracle database, you must install the 32-bit database client prior to installing the Deployment Server. Refer to the section of this chapter entitled: *Installing a 32-Bit Oracle Database Client*.

This section discusses these topics:

- *EnterpriseOne Oracle Database Import/Export Application P96717*
- *Best Practices for Oracle Database Performance*

EnterpriseOne Oracle Database Import/Export Application P96717

Best practices in *JD Edwards EnterpriseOne* environments are to never directly modify an EnterpriseOne database outside of EnterpriseOne. You should always use the JD Edwards EnterpriseOne application P96717 to perform the following Oracle database actions:

- Import Tablespace
- Export Tablespace
- Create Tablespace
- Drop Tablespace

Best Practices for Oracle Database Performance

You should always verify that your Deployment Server machine meets the MTRs (refer to *Accessing Certifications*). The local Oracle database performs best on hard drives that are not fragmented or full. Additionally, the following table lists some guidelines for minimum configurations.

Specification	Recommendation
RAM	2 GB minimum

Specification	Recommendation
Page File Size	Minimum setting should be two times the amount of memory
Disk Space Usage	Oracle database engine requires approximately 1.7 GB of disk space *JD Edwards EnterpriseOne* specifications require approximately 1.7 GB of disk space When fully loaded, best performance is obtained if the hard drive on the Deployment Server machine has at least 20% free space.
Local Database Name	Ensure that any reference in data sources and .ini files refer to the local database name in the *exact* mixed case, which is: **E1Local** Failure to use the exact mixed case will lead to decreased performance of *JD Edwards EnterpriseOne* on the Deployment Server.

Installing the Local Oracle Database on the Deployment Server

If you have not already installed the database engine and a database called **E1Local** does not exist on your Deployment Server, use the procedures in this section to install these requisite components before installing the JD Edwards EnterpriseOne Deployment Server. If the local database engine is already installed and an **E1Local** database exists, do not reinstall the database engine; go to the section entitled: *Understanding the Deployment Server Installer*.

If you want to install the local database under the default location (that is, `c:\Oracle`), and the default Oracle Home Name (that is, **E1Local**), you can run InstallManager to do so. Refer to *Using InstallManager to Install a Local Database*.

If you want to install into another directory or define a different Oracle Home Name, you must run the database installation program `OEE12Setup.exe` from a command prompt and provide one or more arguments. Refer to *Running OEE12Setup.exe from the Command Line*.

This section discusses these topics:

- *Oracle Database 12c Considerations*
- *Using InstallManager to Install a Local Database*
- *Running OEE12Setup.exe from the Command Line*

Oracle Database 12c Considerations

Starting with Oracle Database 12c, Oracle supports the use of an Oracle Home User who will own the install of the database. This user must **not** have Administrator (admin) rights. Note that in this context, the user is the local Microsoft Windows user, not a database user.

This section discusses these topics:

- *Prerequisites to Running the OEE12Setup.exe Program*
- *Specifying the Oracle Home User and Oracle Base Directory*
- *Manually Creating Oracle Home User*

Prerequisites to Running the OEE12Setup.exe Program

The `OEE12Setup.exe` program is used to install the local Oracle database. This program is called from the InstallManager program when you click on this link:

EnterpriseOne Database Engine

Optionally you can also manually launch the `OEE12Setup.exe` program to perform optional functions. In either case (InstallManager or manually), prior to running the `OEE12Setup.exe` program, ensure that this Microsoft Windows System Variable either does not exist, or if it does that it points to a valid JDK:

JAVA_HOME

Otherwise, the `OEE12Setup.exe` program will fail to execute and return an error stating the JDK is invalid.

> **Note:** For instructions on launching InstallManager to install the local Oracle database with default parameters, refer to the section of this chapter entitled: *Using InstallManager to Install a Local Database*. For instructions on manually launching the `OEE12Setup.exe` program to install the local Oracle database with optional parameters, refer to the section of this chapter entitled: *Running OEE12Setup.exe from the Command Line*.

Specifying the Oracle Home User and Oracle Base Directory

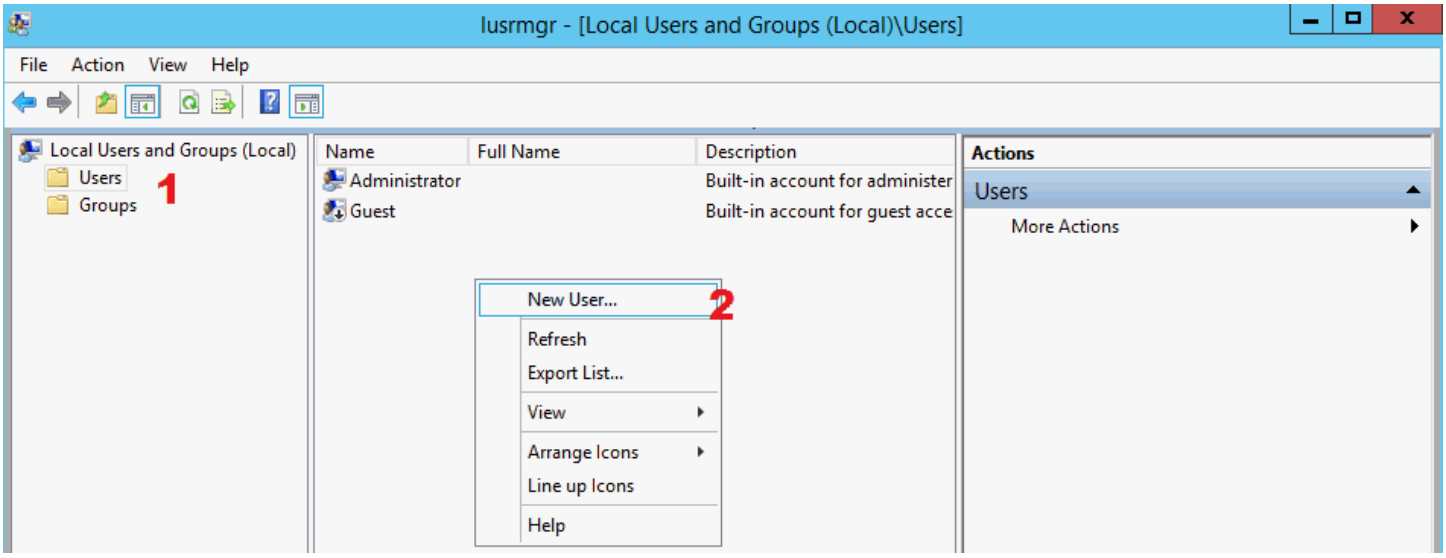
When you launch the `OEE12Setup.exe` program with no switches (this is the default operation when launched from the link on InstallManager) an `OEE12Setup.exe` GUI is displayed prompting for Oracle Home User login and Oracle Base Directory information. This data entry GUI is also displayed when `OEE12Setup.exe` is run certain combinations of command line switches as described in the following section entitled: *Running OEE12Setup.exe from the Command Line*.

Manually Creating Oracle Home User

If you cannot use the `OEE12Setup.exe` program to create the Oracle Home User, you can create the user manually using the steps described in this section.

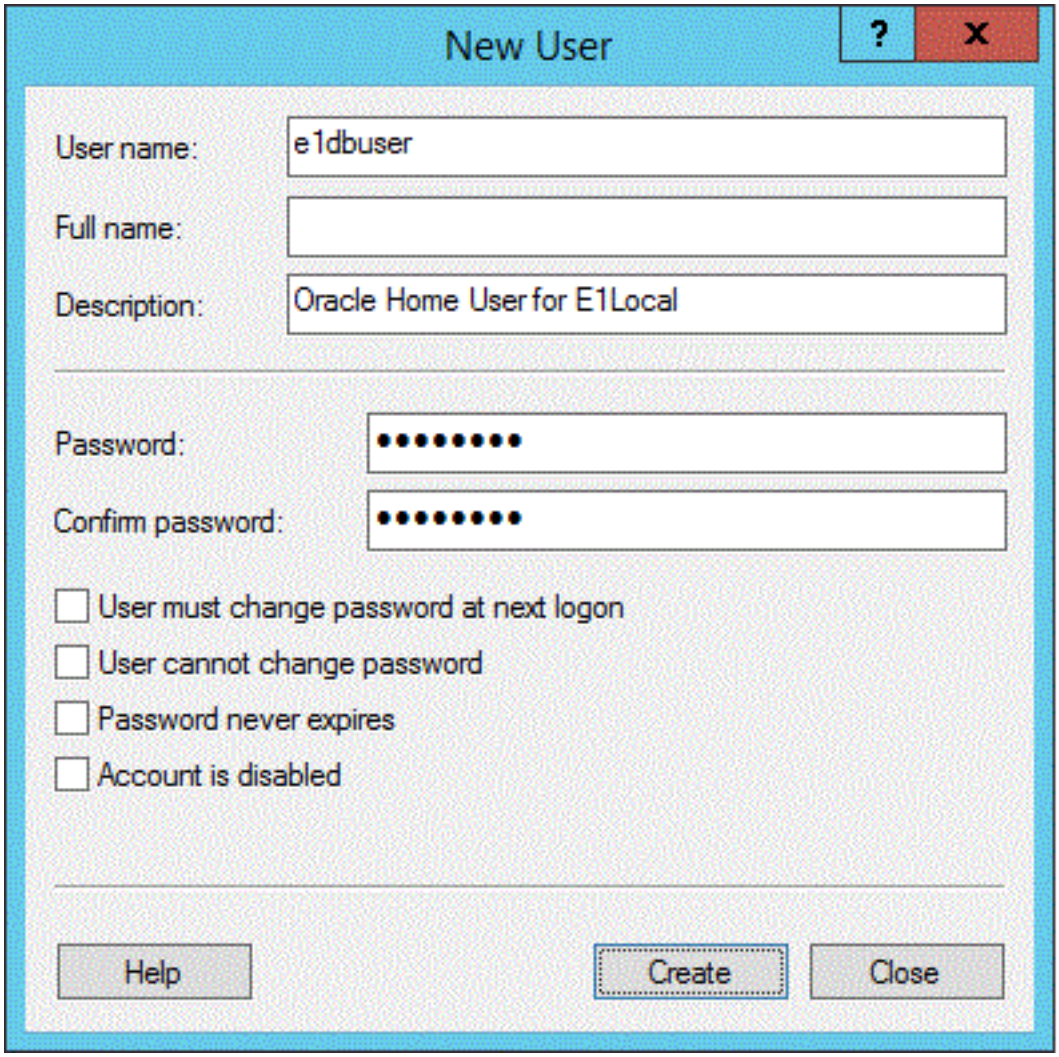
To create a Microsoft Windows user, launch **Local Users and Groups** management console using this navigation:

Control Panel > Administrative Tools > Computer Management > System Tools > Local Users and Groups



1. On Local Users and Groups (Local)\Users, in the left pane, select **Users**.

2. Right click and select **New User**.



3. On New User, complete these fields:

   - *User name:*

     Enter a name for the user. For example, **e1dbuser**.
   - *Password* and *Confirm Password*

     Enter and confirm the password for the user.
   - Ensure this checkbox is **not** checked:

     User must change password at next logon
4. Click the **Create** button.

Using InstallManager to Install a Local Database

1. Obtain the appropriate disk images from Oracle Software Delivery Cloud for the local database you wish to install on your Deployment Server.

2. Log on to the Deployment Server as a user with Administrator rights.

   CAUTION: Ensure that the Administrator account name that you use does not contain any special characters.

3. If you have not already done so, expand all disk images to be under a common directory called Disk1 on your Deployment Server.

   Tip: Refer to the preceding *Tip: Installation Methods* for a list of various installation methods.

   CAUTION: For Microsoft Windows, if you are using a physical DVD and the installation starts automatically, you must cancel this process and start the installation manually.

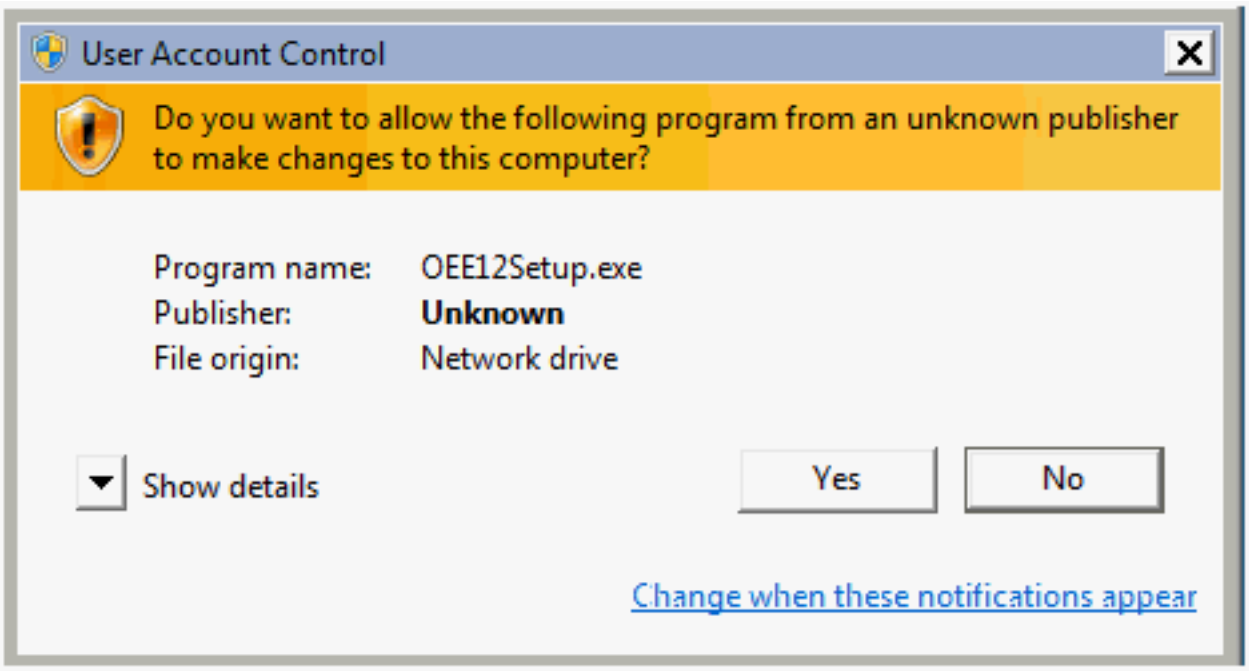
4. Right-click on the `InstallManager.exe` program (either in Disk1 or on your Deployment Server) and select **Run as Administrator**.

   CAUTION: For Microsoft Windows, you must right-click on the executable and select **Run as Administrator** from the drop-down. Likewise, if you have a shortcut assigned to `InstallManager.exe`, you must either configure the shortcut to always run as administrator or right- click the shortcut and choose **Run as Administrator**.

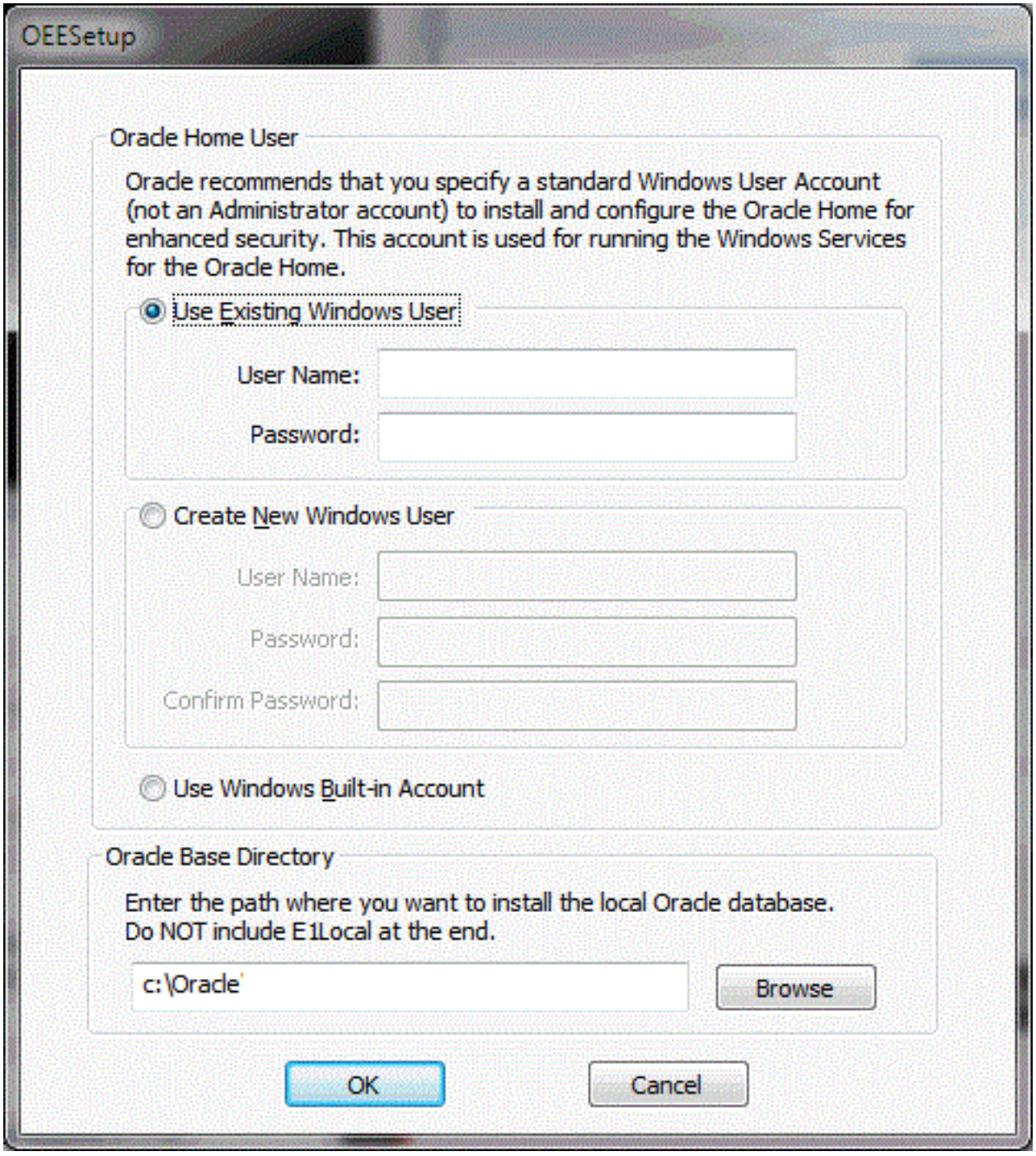
5. On JD Edwards Install Manager, select this link to install the local Oracle database:

   EnterpriseOne Database Engine

   Tip: If you received an error indicating an invalid JDK, refer to section entitled: *Prerequisites to Running the OEE12Setup.exe Program* at the beginning of this section.



6. On User Account Control, click the **Yes** button to launch the `oEE12Setup.exe` installer.



7. On OEESetup, in the Oracle Home User section, you must select an Oracle Home User. For security purposes, Oracle recommends that you specify a standard (that is, non-Administrator) Windows User Account. The

OEE12Setup.exe program will not allow you to specify an account that has Administrator privileges. Valid choices are:

- **Use existing Windows User**

  Choose this option if you want to use an existing account for a Windows user. This user must not have Administrator privileges. You must specify a valid **User Name** and associated **Password** for the user.

  For instructions on how to manually create an Oracle Home User, refer to the section entitled: *Manually Creating Oracle Home User*.

- **Create New Windows User**

  Choose this option if you want **OEE12Setup.exe** to create an account for a Windows user without Administrator privileges. You must specify a valid **User Name** and associated **Password** and **Confirm Password** for the user.

  > **Note: OEESetup Fails to Create the User.** If the **OEE12Setup.exe** program fails to create the user it might be because the password does not meet the password complexity policy requirements of your computer. You can try again with a more complex password, or exit. If you are unable to create the user using the **OEE12Setup.exe** interface, you should try to create it manually and rerun **OEE12Setup.exe**. Refer to the next section entitled: *Manually Creating Oracle Home User*.

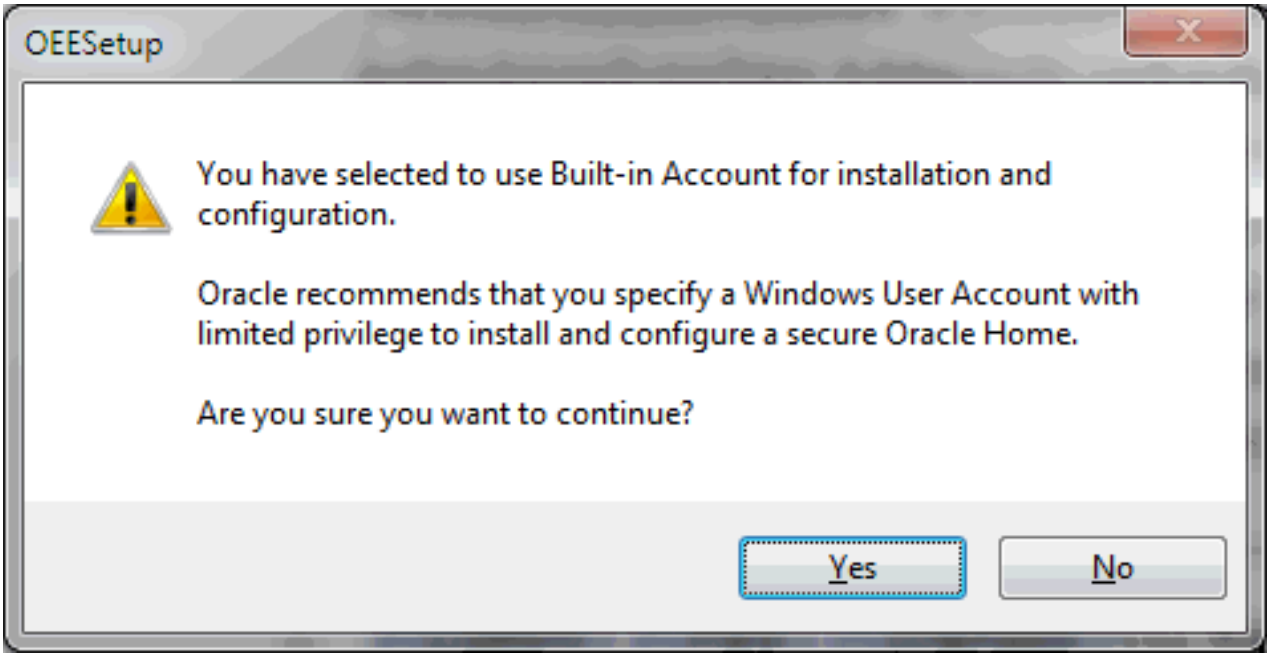
  > **Tip: Password Complexity Policy.** The Administrator user of the Microsoft Windows machine determines the password complexity policy for each machine. Additionally, such policies vary according to the server or client version of Microsoft Windows. The **OEE12Setup.exe** program cannot programmatically determine and return these policy requirements. Therefore it is beyond the scope of this documentation to guide the end user to determine the exact policy requirements for user names and their associated passwords.

- **Use Windows Built-in Account**

  This selection is equivalent to legacy JD Edwards EnterpriseOne functionality for releases prior to Tools Release 9.2.

  > **CAUTION:** For strongest security, Oracle recommends that you do not use the Windows built-in user account. To provide optimal security, you should install and configure with a Windows User Account with limited privileges. For additional details on the Oracle policy regarding **Supporting Oracle Home User on Windows**, refer to this link: *http://docs.oracle.com/database/121/NTQRF/oh_usr.htm*

  If you choose this selection, you are presented with the following dialog where you must confirm that you understand the security impact of this selection.



Click the **Yes** button to confirm and continue, or the **No** button to exit the `OEE12Setup.exe` program.

8. On OEESetup, in the Oracle Base Directory section, enter the path where you want to install the local Oracle database. You can accept the default location or specify a location. If you accept the default location (which is `c:\oracle`), some auxiliary files are installed in that location while the local Oracle database itself is installed in the following location:

   ```
   C:\Oracle\E1Local
   ```

   > **CAUTION:** Do **not** install the Oracle Database 12c into an existing Oracle Base directory. For example, do **not** install into this directory if it already exists: `c:\oracle` If you attempt to install to an existing Oracle directory, the `OEE12Setup.exe` installer will likely fail. Later releases of this installer may be able to programmatically resolve this issue.

   > **CAUTION:** Do not include the string `E1Local` in the path. For example, if you specified `c:\Oracle\E1Local` as the base install path, the local Oracle database would be installed in this location: `c:\Oracle\E1Local\E1Local` Such an installation would not be functional with JD Edwards EnterpriseOne.

9. On OEESetup, click the **OK** button to accept the selected values. If the values are valid the `OEE12Setup.exe` program proceeds to install the local Oracle database.

> **CAUTION:** Do not install into an existing Oracle Base directory at this time, for example, `c:\oracle`. (This base directory is the parent of the **E1Local** directory which actually contains the database.) Select a new base directory for the installation (for example, `c:\oracle2`) if `c:\oracle` already exists. If you attempt to install to an existing Oracle directory, the OEE installer will probably fail until the installer is corrected in a later release of the database.

> **CAUTION:** You must reboot your machine before continuing with the installation of the JD Edwards EnterpriseOne Deployment Server as described in the section in this guide entitled: *Understanding the Deployment Server Installer*.

Running OEE12Setup.exe from the Command Line

This section describes the command line arguments for `OEE12Setup.exe` that can be used to set these default parameters to install the local Oracle database:

- Oracle Base Directory
- System password
- Use the Microsoft Windows built-in user account to install

Depending on which switch or combination of switches are used, running `OEE12Setup.exe` from the command line will prompt for additional user input by displaying the `OEE12Setup.exe` GUI. The following command line scenarios will cause the `OEE12Setup.exe` to display the GUI:

- The Windows built-in account is specified and the Oracle Base Directory is specified but is invalid or empty. The GUI prompts for a valid install directory.
- The Windows built-in account is not specified and the Oracle Base Directory is not specified, invalid, or empty. The GUI prompts for the Oracle Home User and/or the Oracle Base Directory as necessary.

There are two scenarios in which the install is silent (that is, the `OEE12Setup.exe` GUI is not displayed):

1. The only switch specified is to use the Windows built-in account. In this case the default installation directory is assumed, which is `c:\Oracle`.
2. The switch to use the Windows built-in account is used in combination with the switch and valid argument that specifies a valid Oracle Base Directory.

This section describes these topics:

- *Locating and Running the OEE12Setup.exe Program from the Command Line*
- *Use an OEE12Setup.exe Command Line Switch to Change the Default Installation Directory*
- *Use an OEE12Setup.exe Command Line Switch to Set the System Password*
- *Use an OEE12Setup.exe Command Line Switch to Install as the Built-in User*

Locating and Running the OEE12Setup.exe Program from the Command Line

1. If you downloaded the `OEE12Setup.exe` installer and have not already done so, expand all disk images to be under a common directory called Disk1 on your Deployment Server. If you are using the `OEE12Setup.exe` installer provided by your EnterpriseOne administrator, determine where the installer's directory is located.

   > **Tip:** Refer to the preceding *Tip: Installation Methods* for a list of various installation methods.

   > **CAUTION:** You cannot run `OEE12Setup.exe` if you are logged in as an Administrator. For optimal security, you should install and configure with a Windows User Account with limited privileges. For additional details on the Oracle policy regarding **Supporting Oracle Home User on Windows**, refer to this link: *http://docs.oracle.com/database/121/NTQRF/oh_usr.htm*

2. Open a command prompt window.
3. From within the command prompt window, change directory (cd) to the directory that contains the extracted contents of the `OEE12Setup.exe` installer. For example:

   ```
   \\DeploymentServer\OneWorld Client Install\ThirdParty\ORACLE
   ```

> **CAUTION:** Be sure you use the correct set of files for the Oracle 12c local database as described below. The OEE installer for OEE 11g was called `OEESetup.exe` and was accompanied by 15 "cab" files named `E1Local.cab` through `E1Local15.cab`. The OEE installer for OEE 12c is called `OEE12Setup.exe` and has 20 "cab" files called `E1Local12c.cab` through `E1Local12c20.cab`.

Use an OEE12Setup.exe Command Line Switch to Change the Default Installation Directory

Run the `OEE12Setup.exe` program with the `-i` switch to specify the installation directory. The syntax is:

```
OEE12Setup.exe -i<OracleBaseInstallPath>
```

where the `-i` switch tells `OEE12Setup.exe` where to install the local database **E1Local**.

For example:

```
OEE12Setup.exe -ix:\oracle\JDE
```

where "x" is the drive letter. Do not include a space character between the switch and the argument.

If both this switch and the `OracleBaseInstallPath` argument are omitted, the local database will be installed under the default location. If you specify the `-i` switch without the `OracleBaseInstallPath` argument or if the specified directory is invalid, the `OEE12Setup.exe` GUI displays and prompts for this value.

> **Tip:** Do not include `E1Local` as part of this path.

> **Tip:** If you received an error indicating an invalid JDK, refer to section entitled: *Prerequisites to Running the OEE12Setup.exe Program* at the beginning of this section.

Use an OEE12Setup.exe Command Line Switch to Set the System Password

Run the `OEE12Setup.exe` program with the `-p` switch to set the system password. The syntax is:

```
OEE12Setup.exe -p<SystemPassword>
```

where the `-p` switch tells `OEE12Setup.exe` the value to set for the system password.

For example:

```
OEE12Setup.exe -pMyPassword
```

Do not include a space character between the switch and the argument.

If you specify the `-p` switch without the `<SystemPassword>` argument, no operation occurs.

> **Tip:** If you received an error indicating an invalid JDK, refer to section entitled: *Prerequisites to Running the OEE12Setup.exe Program* at the beginning of this section.

Use an OEE12Setup.exe Command Line Switch to Install as the Built-in User

> **CAUTION:** For strongest security, Oracle recommends that you do not use the Windows built-in user account. To provide optimal security, you should install and configure with a Windows User Account with limited privileges. For additional details on the Oracle policy regarding **Supporting Oracle Home User on Windows**, refer to this link:
> *http://docs.oracle.com/database/121/NTQRF/oh_usr.htm*

Run the `OEE12Setup.exe` program with the `-b` switch to install the local Oracle database as the Microsoft Windows built-in user:

```
OEE12Setup.exe -b
```

where the `-b` switch tells `OEE12Setup.exe` the value to install the local Oracle database using the Microsoft Windows built-in account.

> **Tip:** If you received an error indicating an invalid JDK, refer to section entitled: *Prerequisites to Running the OEE12Setup.exe Program* at the beginning of this section.

Installing a 32-Bit Oracle Database Client

You must install a 32-bit version of the Oracle database client and then copy the resulting `tnsnames.ora` file to a subdirectory under the database client installation directory.

> **Note: 64- vs. 32-bit Oracle database drivers.** Because JD Edwards EnterpriseOne is a 32-bit program, it needs to load 32-bit Oracle database driver DLLs; however, you must install a 64-bit Oracle database in the section of this guide entitled: *Installing the Local Oracle Database on the Deployment Server*. Therefore, you also need to install 32-bit Oracle database driver DLLs. These 32-bit DLLs are provided by a 32-bit Oracle database client.

To install a 32-bit Oracle database client:

1. Download the 32-bit Oracle 12c database client from the Oracle Software Delivery Cloud located at this link:

   `http://edelivery.oracle.com`
2. Install the database client.

   > **CAUTION: Important Installation Note:** When installing Oracle the database client, be sure to select **Administrative** on the **Select Installation Type** screen.

   > **CAUTION: Working with the PATH Environment Variable.** Refer to the following step for important instructions on working with the PATH environment variable as it relates to the Oracle database and the Oracle database client.
3. After you installed the Oracle database, the installer placed the path to the database (for example, `c:\Oracle\E1local\bin`) at the start of the Windows PATH environment variable. Then when you installed the 32-bit

Oracle database client, the installer placed the path to the database client (for example, `c:\Oracle\product\12.1.3\client_1\bin`) at the start of the Windows PATH environment variable.

When EnterpriseOne runs, it looks for database drivers in each directory from start to finish in the PATH. The first occurrence of a driver DLL that EnterpriseOne finds will be loaded. This means that the path to the 32-bit Oracle database client must come **BEFORE** the path to the 64-bit Oracle database.

If you followed the recommended installer order and installed the 64-bit database and then the 32-bit database client in that order, the order in the PATH should be correct. However, if you installed them in the opposite order, you need to correct the order in the PATH.

To reverse the order of the 64-bit database and 32-bit database client paths in the Windows PATH, follow these steps:

a. From the Start button, select Control Panel and then System.
b. On the left side of the window that comes up, click Advanced system settings.
c. Click the **Advanced** tab.
d. Click the **Environment Variables...** button.
e. In the **System variables** box, highlight the variable path. and click the **Edit...** button.
f. In the **Variable value** field, cut the 32-bit database client's path including the trailing semicolon. For example:

   ```
   c:\Oracle\product\12.1.3\client_1\bin;
   ```
g. Paste the client's path and semicolon at the start of the Path value.
h. Click the **OK** button.
i. Click the **OK** button to exit from the **Environment Variables** window.
j. Click the **OK** button to exit from the **System Properties** window.
k. Close the **Control Panel** system window.

4. There is a known issue with the Oracle 12c 32-bit database client programs that import (`impdp.exe`) and export (`expdp.exe`) JD Edwards EnterpriseOne data and spec databases during installation of the Deployment Server. To work around the problem, you can force the system to use the `impdp.exe` and `expdp.exe` in the Oracle 12c 64-bit database `\bin` folder for importing and exporting data. This resolves the issue because the 64-bit version of these files do not exhibit the known issue that is observed with the 32-bit version.

   After you install the 32-bit database client, you must either delete or rename these files (so they are not executable) within the `\bin` folder of the 32-bit client:

   - `impdp.exe`
   - `expdp.exe`

   For example, you could change the extension on these files (so they are not executable) using these commands:

   ```
   cd <32-bit_db_client_install_dir>\bin

   rename impdp.exe impdp.exe.bak

   rename expdp.exe expdp.exe.bak
   ```

5. After you install the Deployment Server, you can copy this `tnsnames.ora` file that the installation delivered:

   From:

   ```
   \\<deployment server name>\<release>\client
   ```

   To:

   ```
   <32-bit Oracle Client Install Dir>\network\admin
   ```

Working with Microsoft Windows Visual Studio and Windows SDK

As with previous releases of JD Edwards EnterpriseOne, you must install specific versions of the Microsoft Visual Studio runtime libraries or the Visual Studio product itself before you can run the installer for the Deployment Server. Visual Studio runtime libraries provide the support files for C and C++ based programs to run. The Visual Studio product includes these runtime libraries as well as a compiler and linker which can be used to build JD Edwards EnterpriseOne installable packages.

JD Edwards EnterpriseOne Tools (foundation) and Applications (business functions) are built with different releases of Visual Studio; hence, they each require specific installations of the Visual Studio runtime libraries or product.

- As of the GA release of JD Edwards EnterpriseOne Tools Release 9.2, the required version of Visual Studio runtime libraries is 2010. (The full licensable Visual Studio product is not needed for the JD Edwards EnterpriseOne Tools Release because customers do not rebuild this JD Edwards EnterpriseOne component.)
- As of the GA release of JD Edwards EnterpriseOne Applications Release 9.2, the required version of Visual Studio runtime libraries and product is 2013.

> **Tip:** The net of this discussion is that for a typical Deployment Server installation, both versions of Visual Studio runtime are required at a minimum (VS/2010 and VS/2013). Further, if package builds will occur on the Deployment Server then the full licensable product version of Visual Studio and, if required, the freely-available Windows SDK as specified in Oracle Certify for the applicable EnterpriseOne Applications Release are also required.

You should check Oracle Certifications for the most current specifications for supported releases of Visual Studio for your Tools Release and Applications Release. Refer to *Accessing Certifications* in this guide.

The Visual Studio runtime libraries (which are partial products with no development tools) for each supported release of Visual Studio are freely available from the Microsoft Download Center. The complete Visual Studio product (which includes the runtime and the compiler and associated tools) must be purchased and licensed from Microsoft.

> **Note:** Only 32-bit versions of Visual Studio runtime libraries are supported for use with JD Edwards EnterpriseOne. Note these Microsoft product attributes:
>
> - The Microsoft Download Center designates 32-bit versions of software with the term **x86**.
> - The Visual Studio product comes with both 32- and 64-bit versions of the runtime libraries.
> - When searching the Microsoft Download Center for a particular product, you may need to use these search terms: **Visual Studio** or **Visual C++**.

As of the GA of Tools and Applications Release 9.2 these versions and their associated links and navigation are valid:

Visual Studio 2010 Redistributable

Microsoft.com > Downloads > Search > Microsoft Visual C++ 2010 Redistributable Package (x86)

http://www.microsoft.com/en-us/download/details.aspx?id=5555

> **Tip:** Some Microsoft Windows systems may already have Visual Studio installed, either manually or by some other Microsoft product installation. Users can determine if this version already exists in Control Panel > Programs and Features > Microsoft Visual C++ 2010 x86 Redistributable.

Visual Studio 2013 Redistributable

Microsoft.com > Downloads > Search > Microsoft Visual C++ 2013 Redistributable Package (x86)

http://www.microsoft.com/en-us/download/details.aspx?id=40784

Visual Studio 2013 Download and Windows SDK

> **Note:** You only need the Visual Studio 2013 download, which is a licensed product from Microsoft, if you plan on building packages on the Deployment Server. An additional package build requirement is the Windows SDK, which is a freely available program from Microsoft.

Visual Studio Download

Microsoft.com > Downloads > Search > Microsoft Visual C++ 2013 Download

https://msdn.microsoft.com/en-us/library/dd831853(v=vs.120).aspx

Windows Software Development Kit for Windows 8.1

> **Note:** Although the SDK download is labelled as Microsoft Windows 8.1, the same download is applicable to both Windows Client 8.1 and Windows Server 2012. This SDK is specifically required for any Windows-based machine that is building JD Edwards EnterpriseOne packages.

Microsoft.com > Downloads > Search > Windows Software Development Kit for Windows 8.1

https://msdn.microsoft.com/en-us/windows/desktop/bg162891.aspx

Microsoft Windows Internet Protocol Version 4 (IPv4)

The JD Edwards EnterpriseOne Deployment Server requires Microsoft Windows Internet Protocol Version 4 (IPv4) for connectivity. It cannot function using IPv6.

If your Deployment Server is not working as expected, use this procedure to determine if the problem is due to your Windows machine using IPv6 and if so, to remedy:

1. After installing the local Oracle database, use a text editor to open the `log.xml` file which is typically located in this directory

   C:\Oracle\diag\tnslsnr\[MACHINE NAME]\listener\alert\.
2. Examine the contents of the `log.xml` file for indicators that the machine is using IPv6 addresses.

IPv6 addresses can be distinguished by alphanumeric digits separated by colons, rather than periods as in IPv4 addresses.

One example is if you see `host_addr='::1'>`. This indicates an IPv6 address, which in this case is the machine's local loopback address, whose equivalent IPv4 address is 127.0.0.1.

Another example that indicates the use of IPv6 is if this string exists:

```
host_addr='fe80::7045:1aba:cb6d:1b50%13'
```

3. If you see references to IPv6 addresses in the logs after installing the Oracle local database, then you may need to deinstall the Deployment Server and Oracle database as described in the chapter of this guide entitled: *Uninstalling the Local OEE from the Deployment Server*,.

   Also, you may possibly need to perform additional cleanup for the Oracle Database as described in the section of this guide entitled: *Manual Cleanup of a Uninstalled Oracle Database on the Deployment Server*.
4. After the deinstall and cleanup is complete, you must apply a software patch from Microsoft to disable IPv6 before reinstalling the Oracle local database and EnterpriseOne Standalone or Web Development Client. The Microsoft patch for disabling IPv6 is at the following link:

   How to disable IPv6 or its components in Windows

   http://support.microsoft.com/kb/929852

   On the above Microsoft web page, click the link labeled **Disable IPv6** (Microsoft Fix it 50409).
5. After you apply the Microsoft patch to disable IPv6, you can reinstall the Oracle database and EnterpriseOne Standalone Client using the procedures in this guide.

   MICROSOFT DISCLAIMER ON DISABLING IPV6

   Important: Internet Protocol version 6 (IPv6) is a mandatory part of Windows Vista and later versions. We do not recommend that you disable IPv6 or its components, or some Windows components may not function. For more information, see the "What are Microsoft's recommendations about disabling IPv6?" question in IPv6 for Microsoft Windows: Frequently Asked Questions at this link:

   http://technet.microsoft.com/en-us/network/cc987595.aspx

Install the Java Runtime Engine (JRE)

Beginning with Tools Release 9.2, you must have a 32-bit JRE installed prior to running the Deployment Server installation program, The installer prompts you for the location of the preinstalled JRE. It programmatically verifies that the JRE is a 32-bit version. The installer then copies that JRE from the specified location to a location expected by JD Edwards EnterpriseOne runtime processes. Refer to Oracle Certifications for supported JRE versions.

Working with JDBC Drivers on the Deployment Server

The Deployment Server requires database-specific JDBC drivers for several purposes as described below. This section describes:

- *Obtaining the JDBC Drivers*

- *Copying the JDBC Drivers to the Deployment Server*

Obtaining the JDBC Drivers

Based on the database being used on your JD Edwards EnterpriseOne Enterprise Server, you should obtain the required java-based JDBC driver files from your database vendor. Access the current Minimum Technical Requirement (MTR) listing from My Oracle Support for the proper JDBC driver files to obtain. For help with locating MTRs, refer to *Accessing Certifications*. Place the driver files in the location specified in the section of this guide entitled: *Copying the JDBC Drivers to the Deployment Server*.

In addition, for JD Edwards EnterpriseOne *Release 9.2* , all installations of the Oracle database on the Deployment Server require a driver for local database connectivity on the Deployment Server (required to build and deploy ESUs) and to perform installations of the Development Client). You can locate the Oracle database driver in these locations:

- Oracle Enterprise Edition Database (on your *JD Edwards EnterpriseOne* Enterprise or Database Server)

  Your installation of an Oracle 12c database product includes the Oracle JDBC driver(s). Typically the driver is located in this directory of your Oracle 12c installation:

  `\jdbc\lib`

- Oracle Technology Network (OTN)

  `http://www.oracle.com/technetwork/indexes/downloads/index.html`

You cannot have multiple Oracle JDBC driver files (such as **`ojdbc.jar`**, **`ojdbc5.jar`** and **`ojdbc7.jar`**) in the same folder (**`\misc`**) or else the drivers will conflict, which will cause access failure to the Oracle database on your Enterprise Server. The Oracle JDBC driver (for example, **`ojdbc7.jar`**) is added to the **`\misc`** folder by the Deployment Server installer.

> **Note:** You must manually copy the driver files from the installed location to the location specified in the section of this guide entitled: *Copying the JDBC Drivers to the Deployment Server*.

Copying the JDBC Drivers to the Deployment Server

> **CAUTION:** This step must be done before starting the installer, as one of its first steps the installer attempts to load all jar files needed for the process.

After you have obtained the JDBC driver(s) from the database vendor(s), you should copy the driver file(s) (and, if applicable, any associated license files) in this directory on the Deployment Server:

`x:\DepSvr\Disk1\DeploymentServer\Misc`

where "x" is a drive name, and

where "DepSvr" is the name of your Deployment Server, and

where **`\DepSvr\Disk1\DeploymentServer\Misc`** contains the Deployment Server install image.

You must supply this directory location and name when you run the Deployment Server Installer.

Install the Deployment Server using the Oracle Universal Installer (OUI)

This section describes these topics:

- *Obtaining and Preparing the Deployment Server Install Image*
- *Prerequisites*
- *Working With the OUI Installer to Install the Deployment Server*

Obtaining and Preparing the Deployment Server Install Image

You install the Deployment Server Install image from DVD images obtained from the Oracle e-delivery web site:

http://edelivery.oracle.com

To install from images downloaded from the Oracle e-delivery web site:

1. Create a parent download directory on a disk with at least 15 GB free space. For example:

   c:\DepSvr\Disk1
2. Download the source DVD images for the JD Edwards EnterpriseOne Deployment Server into the directory you created in Step 1.
3. You must use either the 7-Zip or WinZip program to unzip each of the DVD images into the directory you created in Step 1 (to verify successful extraction see **Caution** below).

   > **Note:** During the extraction if you receive a message indicating that . .**\META-INF\MANIFEST\MF** already exists, at the prompt you can choose either Ignore or Replace.

   > **CAUTION:** You cannot use the built-in Microsoft Windows Explorer functionality to extract the zip files otherwise the result is an incomplete install image. You **must** use WinZip or 7Zip. To verify a successful extraction, check the file size of **SPEC_MASTER.DBF**. This file should be 1.75 GB.

   After unzipping all DVD images, you should have a structure that looks like this:

```
c:\DepSvr\Disk1\
                DeploymentServer\
                Install\
                META-INF\
                Misc\
                stage\
                InstallManager.exe
                InstallManager.htm
                InstallManager.ico
                ONEWORLD.ICO
                OracleLogo.gif
```

```
README.TXT
```

> **CAUTION:** The directories contained on the Disk2, Disk3, Disk4, Disk5, and Disk6 images are all at the same hierarchal level as the **\Disk1\DeploymentServer** directory. When your unzip operation is complete, all the files must be in the same structure as the **\Disk1\DeploymentServer** directory. You should not have either a Disk2, Disk3, Disk4, Disk5, or Disk6 directory.

Prerequisites

Before you run the OUI Deployment Server installer, shut down all programs running on the Deployment Server that could cause DLL conflicts (such as Microsoft SQL Services, Internet Explorer, Microsoft Word, or Adobe Acrobat). You can restart these programs after you finish installing the Deployment Server.

> **CAUTION:** If you are planning on using the same Deployment Server machine for multiple releases of JD Edwards EnterpriseOne, and you already have a release previous to Applications Release 9.2 installed on the machine, you should use SnapShot prior to installing the Applications Release 9.2 on the Deployment Server. The SnapShot program is a JD Edwards utility and its use is documented in the guide entitled: *JD Edwards EnterpriseOne Development Client Installation Guide for Oracle WebLogic Server (WLS) and WebSphere Application Server (WAS) Express* . While only a single instance of an Applications release can be "active" on a Deployment Server at one time, by using SnapShot you can preserve and switch between complete configurations for various releases of JD Edwards EnterpriseOne.An example of one use for this functionality is if you need to apply an ESU to a previous Applications Release of JD Edwards EnterpriseOne. SnapShot preserves the directory structure that supports the various pathcodes, which may or may not be installed:
>
> ```
> Z:\JDEdwards\E920
>                  \PLANNER  (9.2 objects, JDEPLAN920 etc)
>                  \DV920
>                  \PD920
>             \E910
>                  \PLANNER  (9.1 objects, JDEPLAN910 etc)
>                  \DV910
> ```

Working With the OUI Installer to Install the Deployment Server

This section describes these tasks:

- *Understanding the Deployment Server Installer*
- *Understanding EnterpriseOne Files Location*
- *Before Launching the Deployment Server Installer*
- *Running the JD Edwards EnterpriseOne Deployment Server Installer*
- *Updating the Enterprise Server Port Number in the jas.ini File*
- *Examine the Local Database Installer Logs*

Understanding the Deployment Server Installer

A local Oracle (OEE) database engine and a database called E1Local must already exist on this machine. If not, use the procedures in the preceding section entitled: *Installing the Local Oracle Database on the Deployment Server*.

Tip: Installation Methods

You can install the Deployment Server using any of these methods:

- Directly from the Deployment Server installation DVD.
- From a copy of the Deployment Server installation DVD that exists on a hard disk drive.
- From a downloaded and unzipped image of the installation DVD that was obtained from the Oracle E-Delivery web site.

CAUTION: Microsoft Windows 2012. If you are running the *JD Edwards EnterpriseOne* Deployment Server on a Microsoft Windows 2012 platform, you must be signed onto the machine as administrator. Additionally you must run all *JD Edwards EnterpriseOne* installers and processes '**as Administrator** '. Due to the security model on Microsoft Windows 2012, failure to run the *JD Edwards EnterpriseOne* processes '**as Administrator** ' will likely result in random and unpredictable failures in the processes at run time.

CAUTION: Remote Desktop. If you are using Remote Desktop to connect to the Deployment Server, you must use the `/admin` argument to launch Remote Desktop. For example: `c:\WINDOWS\system32\mstsc.exe /F /admin` If you do not run Remote Desktop with the `/admin` argument, Microsoft Windows blocks several important installer functions although Microsoft Windows reports success to the installer. For example, some registry entries will be missing and the Share for the Deployment Server will not be correctly created.

The Oracle Universal Installer (OUI) process creates temporary files during the install. By default these are placed on the c: drive of your Windows-based Deployment Server. You may need a sizable amount of free space on your c: drive in order to complete the installation successfully.

Microsoft Windows 2012

For Microsoft Windows 2012, pay special attention to the various **Cautions** in the steps in this chapter.

This table lists the mandatory and optional components of the Deployment Server installation.

Server	Mandatory Component	Optional Components
Deployment Server	Deployment Client EnterpriseOne Files	Development environment Prototype environment Pristine environment Production environment

The installation process for the Deployment Server performs these functions:

- Installs the objects from the DVD images.
- Creates the path code directory structures (such as *PS920* and *PD920*) based on your selections.
- Updates the Microsoft Windows Registry.

Note: You can run the Deployment Server and the Platform Pack installation concurrently (assuming the installation programs are run on different machines).

After verifying the support structure as shown in the section of this guide entitled: *Obtaining and Preparing the Deployment Server Install Image*, you can install the Deployment Server. This process installs the Deployment Server from DVD images.

Note: You must install the Deployment Server locally; you cannot install the Deployment Server from a remote machine. However, you can choose to install JD Edwards EnterpriseOne files and environments on a remote machine using a mapped drive. Prior to installing to a remote machine, you must have already setup the drive with network mapping.

Understanding EnterpriseOne Files Location

The software component called *EnterpriseOne Files* is a pre-defined grouping of files that can be installed on your local machine or a mapped network drive. It includes EnterpriseOne system files and pathcodes for these four (4) environments:

- Development
- Prototype
- Pristine
- Production

By default the installer assumes the local machine is the Deployment Server. As such it provides a default value for your *Oracle Home* path.

You cannot change this local path value after the installation is complete; it must remain whatever value you specified at the time of installation.

Optionally you can choose to install EnterpriseOne (E1) Files to a remote machine as the Deployment Server. If you do so, the installer creates a unique "planner client" on the local machine that contains only the Planner pathcode. You should only set up one "planner client" machine to do the Deployment Server jobs such as applying software updates, running installation plan, and so on.

Using a Remote Machine as the Deployment Server

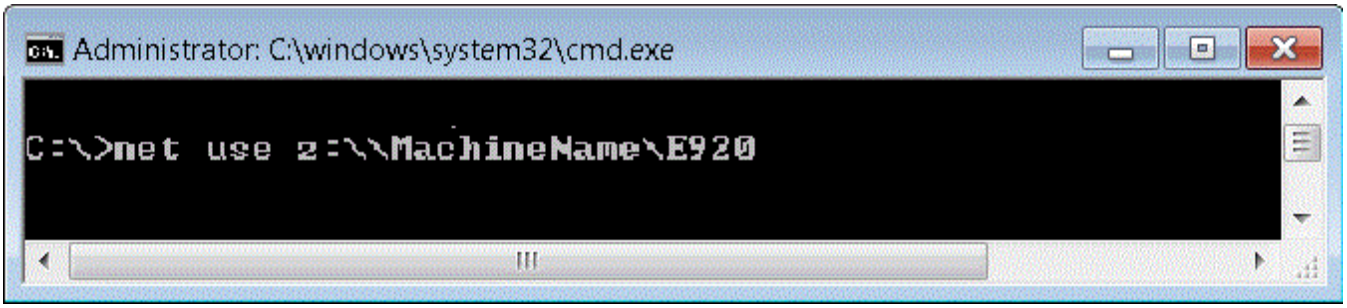
If you intend to use a remote machine as the Deployment Server, prior to running the Deployment Server installer you must first map a network drive using this procedure:

1. On the remote Deployment Server, create a folder as the target location in which the installer will place the EnterpriseOne (E1) files. For example:

   ```
   E:\JDEdwards\E920
   ```
2. Using the example above, share the target folder `E920` with full permissions.

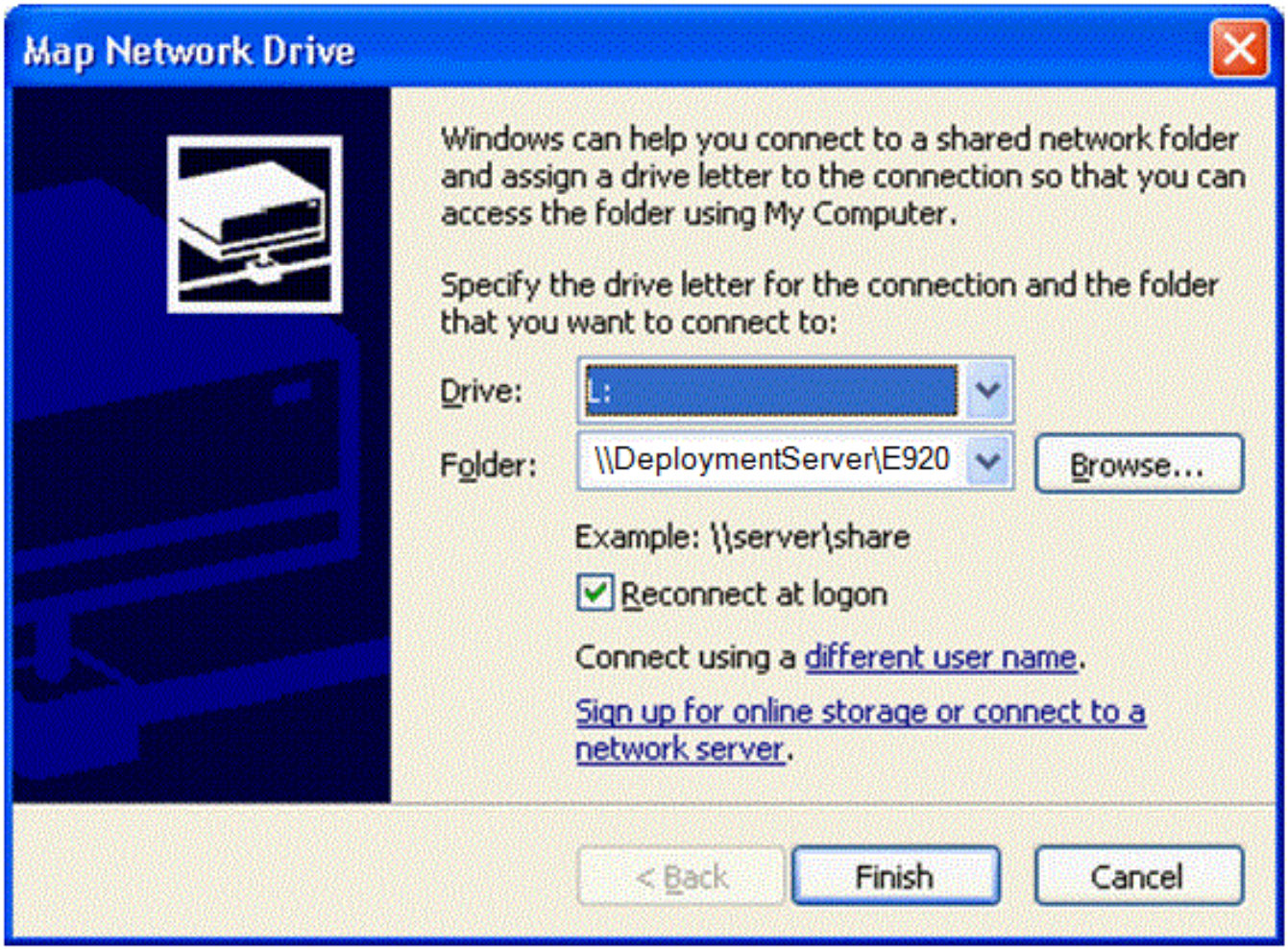
3. **CAUTION:** Because the Deployment Server installer must be run as an Administrator, you must also map a network drive as an Administrator.

Start a Command Prompt as Administrator and map a network drive on the local machine to the remote Deployment Server machine. For example, map `z:\` to `\\Remote_Deployment_Server_Machine_name\E920`



Tip: You can verify that the drive is being mapped as an Administrator by confirming that **Administrator:** is displayed in the title bar of the Command Prompt window.

The below screen shows a sample of a properly mapped network drive for the remote Deployment Server:



Note: In a later separate process described in *Running the JD Edwards EnterpriseOne Deployment Server Installer*, when you are prompted by the installer for the location of the remote Deployment Server, in the location field you can browse to or enter the mapped drive including the drive letter designation. Using the example described previously in this step, the value would be the `z:` drive. Using the above screen shot as an example, the value would be the `L:` drive. The same installer validates the location that you enter for the remote location. If the mapping to the remote location is not valid or the directory specified in Step 1 above does not exist on the remote machine, the installer will not continue.

Note: The installer validates the location. If the mapping to the remote location is not valid the installer cannot continue. Likewise the directory specified in Step *1* must exist on the remote machine or else the installer cannot continue.

Before Launching the Deployment Server Installer

Before you launch the Deployment Server installer, you should obtain the JDBC drivers for the Enterprise Server database and also for your local Oracle database. You can place the JDBC drivers in the DVD images directory on your

Deployment Server either before or after running OUI to install the Deployment Server; however, it is preferable that you copy the drivers before running OUI. For instructions on obtaining and placing the requisite JDBC drivers, refer to the section *Working with JDBC Drivers on the Deployment Server*.

> **Note:** The Deployment Server OUI installer delivers the requisite JDK/JVM.

Running the JD Edwards EnterpriseOne Deployment Server Installer

> **CAUTION:** Before you run the Deployment Server installer, you must have already installed a supported JRE on the Deployment Server. This JRE is required for the runtime of JD Edwards EnterpriseOne on the Deployment Server. Refer to the section of this guide entitled: *Prerequisites*.

Use the procedure in this section to install the JD Edwards EnterpriseOne Deployment Server.

1. Log on to the Deployment Server as a user with Administrator rights.

   > **CAUTION:** Ensure that the Administrator account name that you use does not contain any special characters such as ampersands, asterisks, or underscores.

2. Locate the disk 1, which is either a physical disc or disc image directory, for the Deployment Server installation DVD.

   > **Tip:** Refer to the preceding *Tip: Installation Methods* for a list of various installation methods.

   > **CAUTION: Microsoft Windows 2012.** For Microsoft Windows 2012, if you are using a physical DVD and the installation starts automatically, you must cancel this process and start the installation manually.

   > **CAUTION: Microsoft Windows 2012.** For Microsoft Windows 2012, you must right-click on the executable and select **Run as Administrator** from the drop-down.

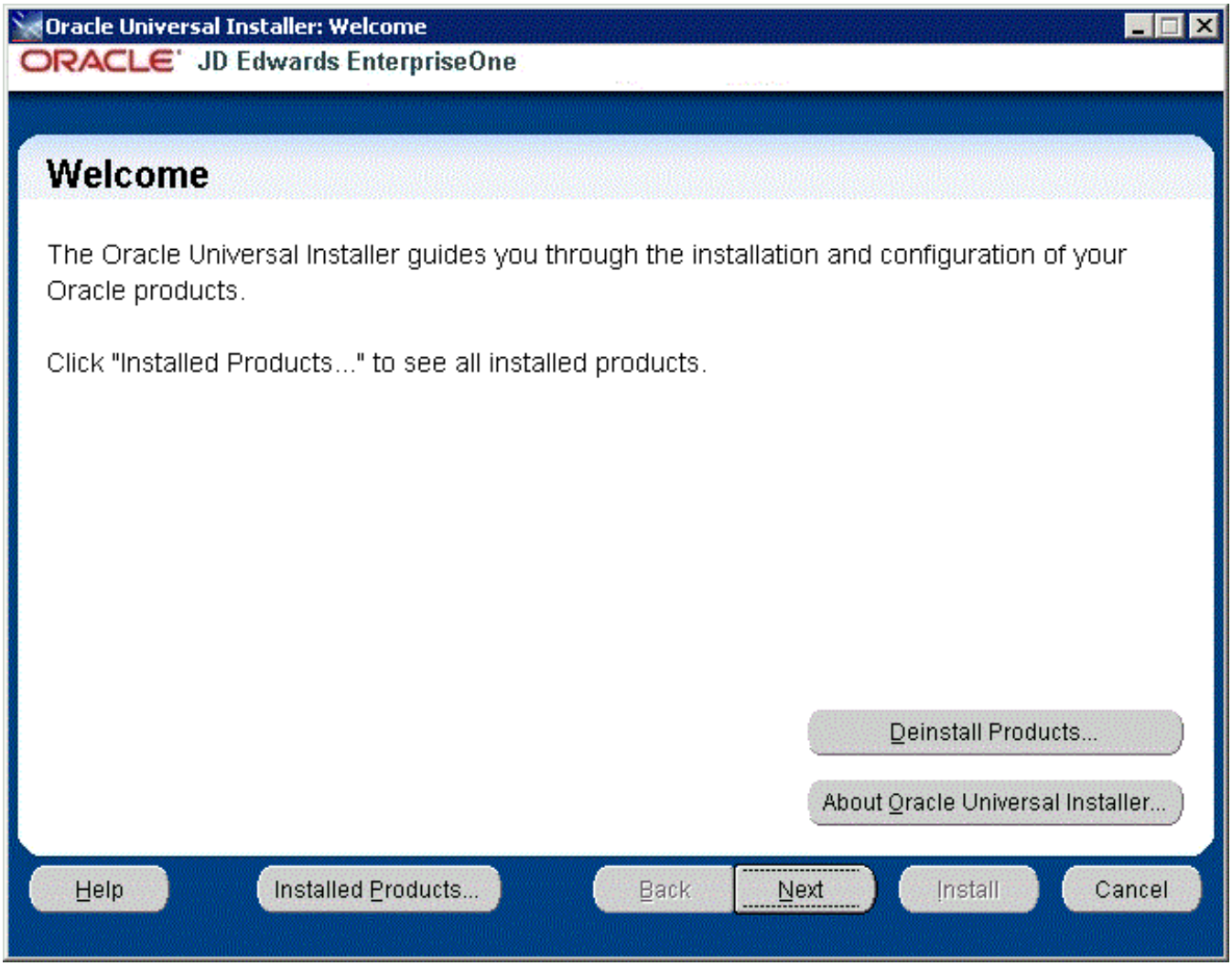
3. From disk1, execute the `InstallManager.exe` file from the root folder. For example:

   ```
   \Disk1\InstallManager.exe
   ```

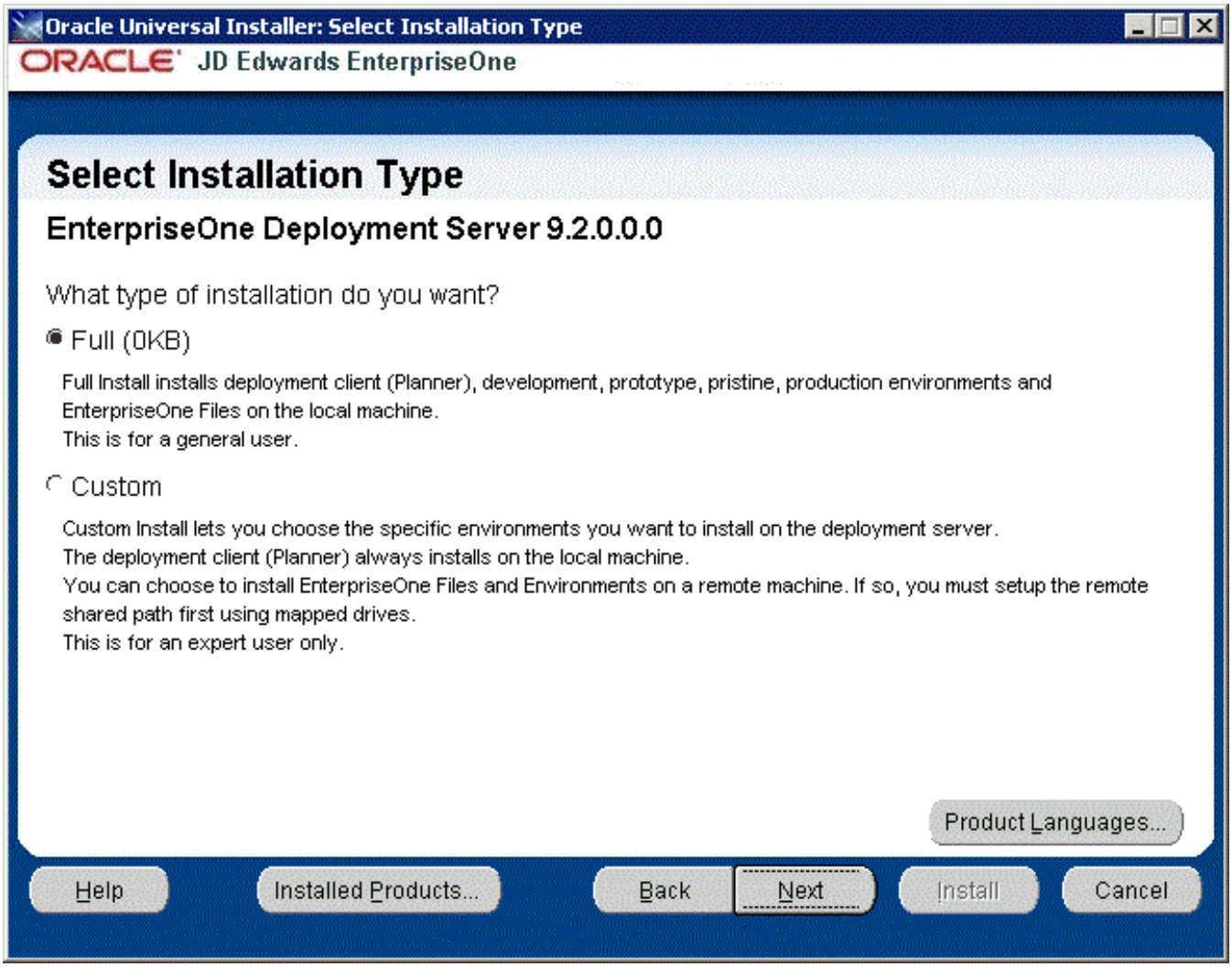
4. On JD Edwards Install Manager, select this link:

   EnterpriseOne E920 Deployment Server

5. After the OUI installer is launched, a command window is briefly displayed and then it is closed and the Welcome screen is displayed.



6. On Welcome, select the **Next** button.



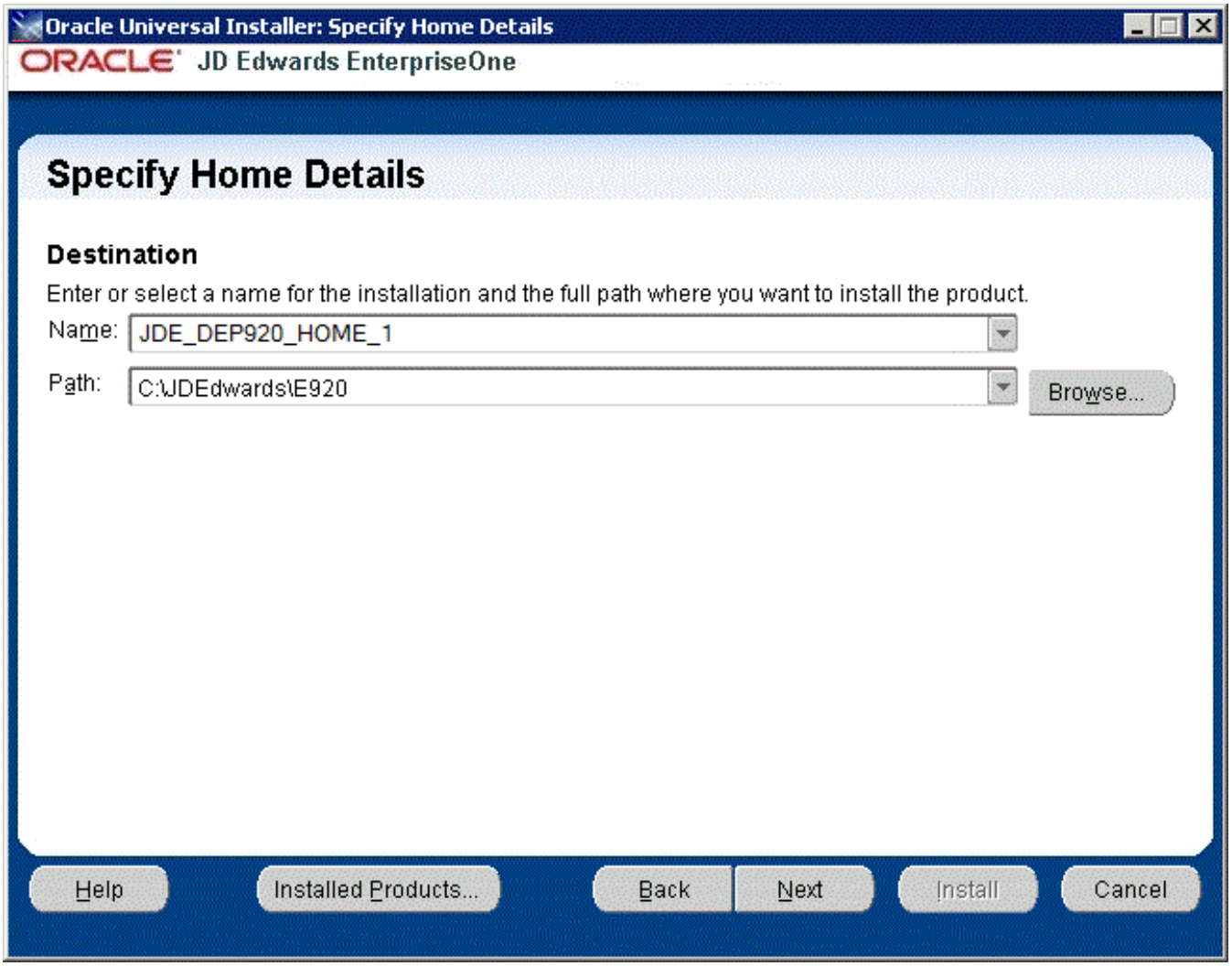
7. On Select Installation Type, select the appropriate radio button for these installation types:

   - **Full**

     The **Full** selection installs the Deployment Client (Planner), Development, Prototype, Pristine and Production pathcodes and also installs JD Edwards EnterpriseOne files on the local machine. This selection is recommended for the general user.
   - **Custom**

     The **Custom** selection lets you choose the specific environments you want to install on the deployment server. The deployment client (Planner) is always installed on the local machine. You may choose to install JD Edwards EnterpriseOne Files and environments on a remote machine. In that case, first you need to setup a mapped drive as described in the section of this guide entitled: *Understanding EnterpriseOne Files Location*. This selection is only recommended for an expert user.

8. After you have selected an installation type, select the **Next** button.



9. On Specify Home Details, you must specify an Oracle Home path and a name for that path.

> **Tip:** For more information about Oracle Homes and recommendations for naming the Oracle Homes for the JD Edwards EnterpriseOne Deployment Server, see the section in this guide entitled: *Understanding Destination Paths*.

Each Oracle product that is installed on a machine has what is termed an **Oracle Home** path. This path contains all the files for each Oracle product. This path has a user-specified name as well.

On Specify Home Details, complete these fields:

Field	Description
Name	Enter a name for the Oracle Home for the JD Edwards EnterpriseOne Deployment Server. For example: **JDE_DEP920_HOME_1** **Tip:** Although the default path provided by the OUI installer includes the suffixed "`_1`" string, Oracle recommends you remove that suffix string and make the path simply: **JDE_DEP920_HOME**
Path	The path you enter here is for the Oracle Home path where the E1 Deployment Server will be installed. For example, the path might be: `C:\JDEdwards\E920` Do not specify the same *Oracle Home* name or path into which you installed the local database; however, you can specify a path that is a subdirectory of the database's **Parent Oracle Home**. For local installation, you must use the default value. For remote installation, this value must be the letter designation of the mapped drive. For additional details, refer to the section of this chapter entitled: *Understanding Destination Paths*.

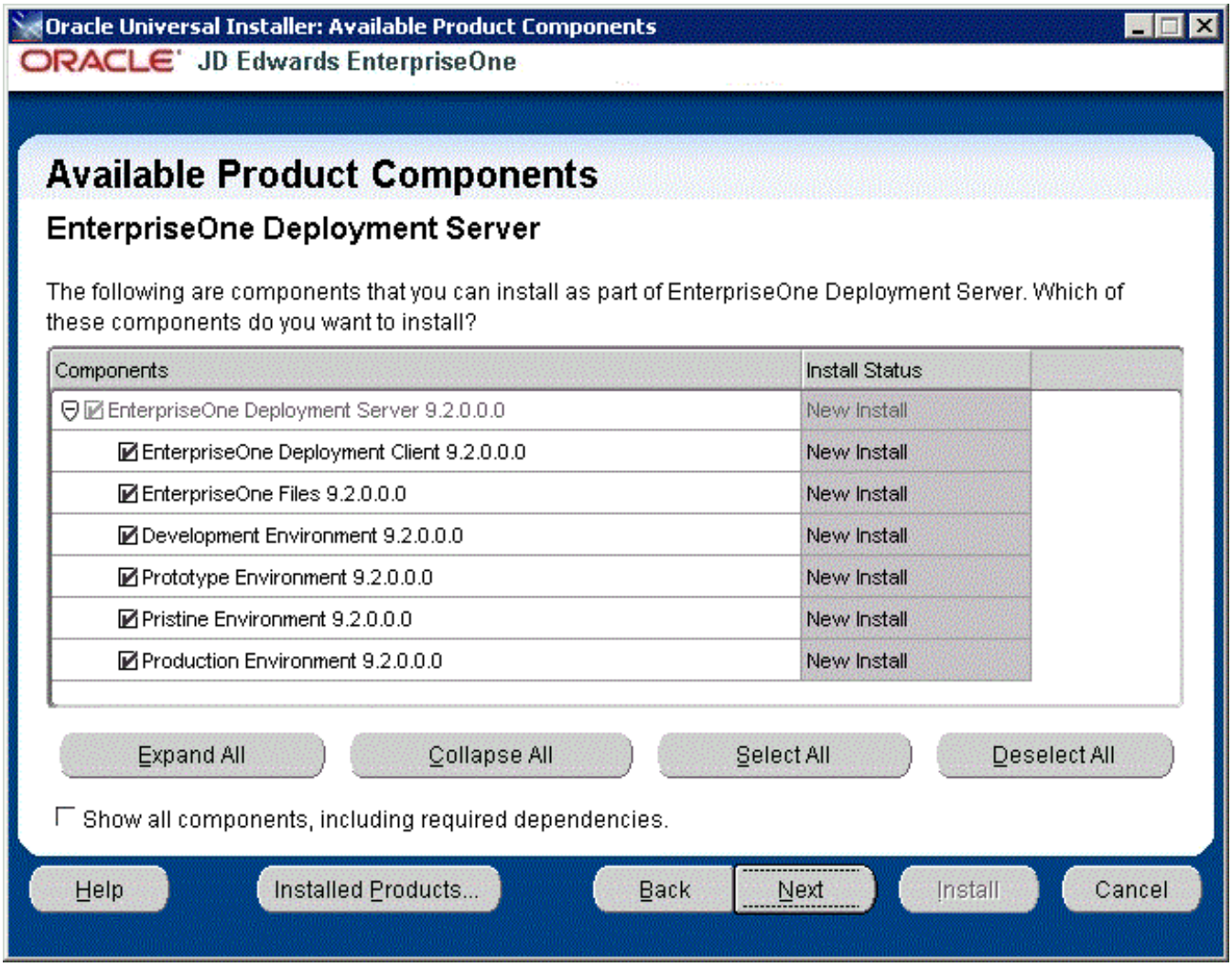
10. Select the **Next** button.

The installer checks the specified target drive to ensure there is sufficient disk space to complete the installation. If the installer detects insufficient disk space it displays the following error:

If you receive the above error, you must click the **OK** button and restart the installation to a target drive with sufficient disk space.

11. Select the **Next** button.

> **Tip:** If you chose **Full** installation on the preceding screen (Select Installation Type), you can skip directly to Step *18* located later in this task to complete the Deployment Server installation. If you chose **Custom** installation on the preceding screen (Select Installation Type), proceed with the following steps.



> **Note:** The Available Product Components screen and subsequent screens until the Summary are displayed if you chose **Custom** installation on Select Installation Type in Step *7*.

12. On Available Product Components, EnterpriseOne Deployment Server, enable the checkboxes to select these features components you want to install:

    - **EnterpriseOne Deployment Client**

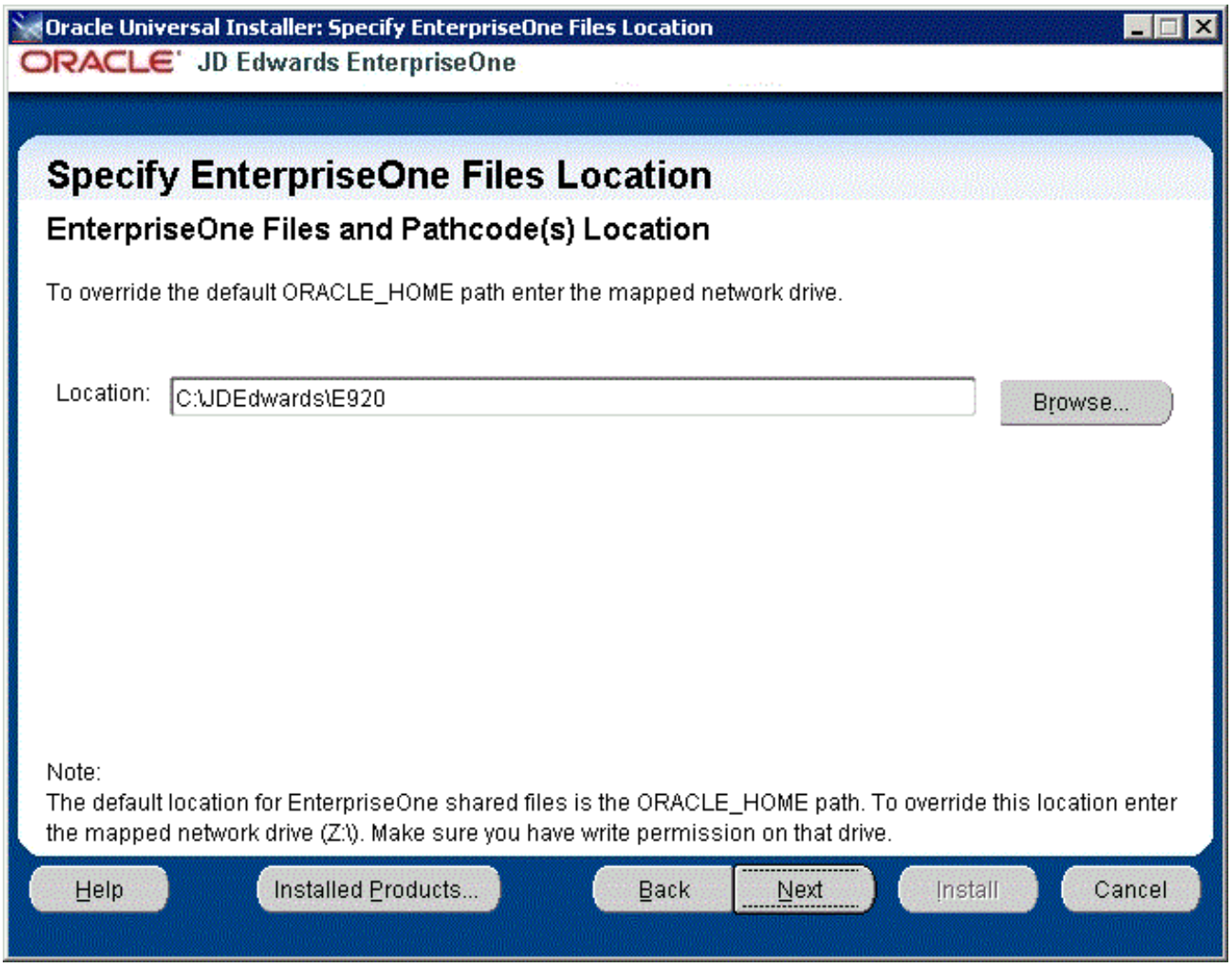
      The selection for EnterpriseOne Deployment Client is mandatory in order to select other components. If you do not select this component, you cannot select any other components. This installs the planner pathcode and databases on the local machine. You will be given an option to install other components on a remote share.
    - **EnterpriseOne Files**

      The selection for EnterpriseOne Files includes mandatory system files. If you do not select this component you cannot select any other environment components. Likewise, if you re-run the JD Edwards EnterpriseOne Deployment Server Installer to add an environment it will check to ensure that

these files are already installed and you will not be given an option to install the environment on a machine, drive, or directory that is different from that which contains the JD Edwards EnterpriseOne files.

- **Development Environment**
- **Prototype Environment**
- **Pristine Environment**
- **Production Environment**

Tip: You can use the **Select All** button to select all components.



13. On Specify EnterpriseOne Files Location, you can accept the default local value or enter a mapped network drive.

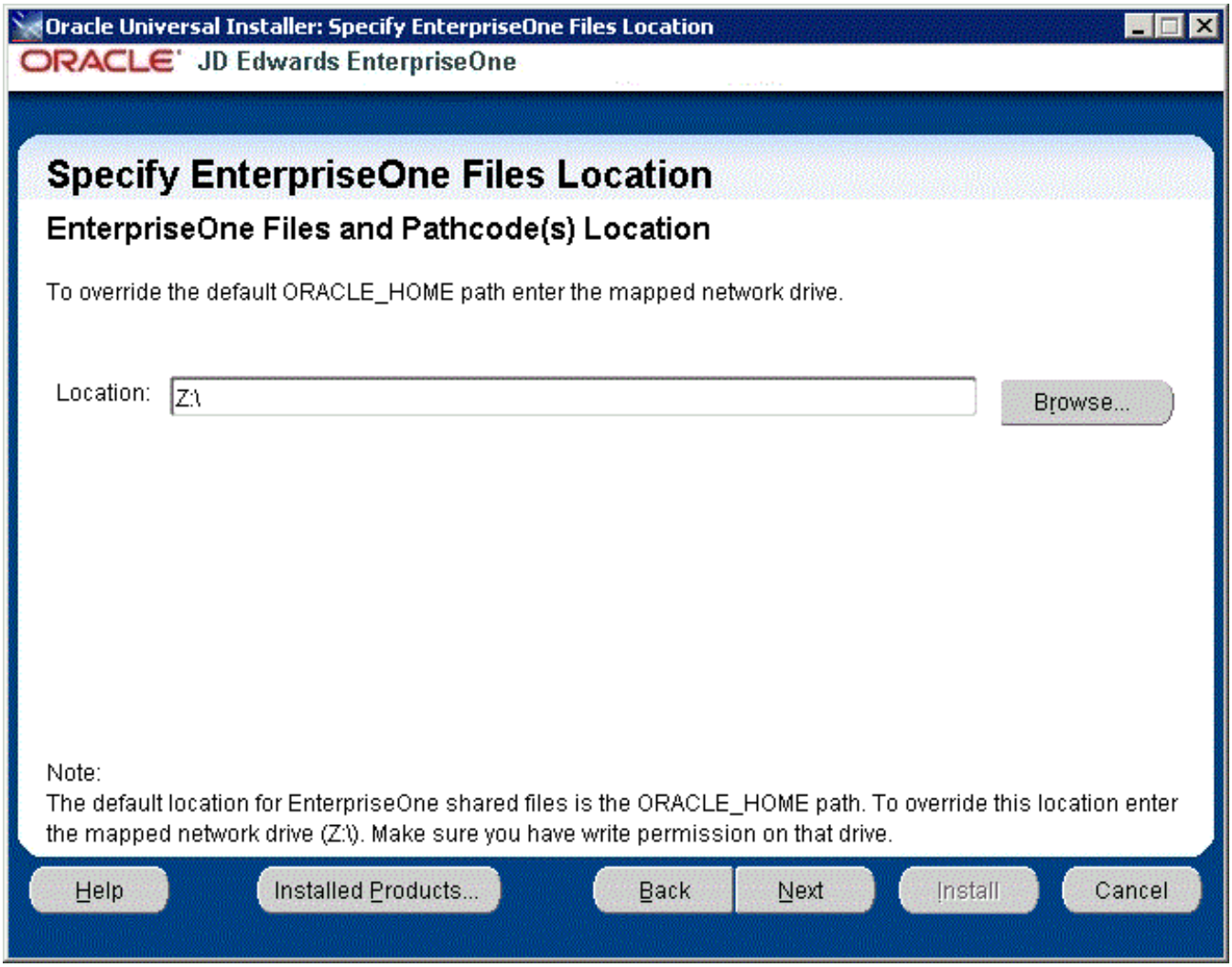
    The installer provides a default value which is your *Oracle Home* path. For example:

    ```
    C:\JDEdwards\E920
    ```

    If you prefer to install JD EnterpriseOne Files to a remote Deployment Server, you can specify a mapped drive. For example:

    ```
    Z:\
    ```

    The following screen shot shows an example of how to properly specify a previously defined mapped drive.



For more on the proper use of mapped drives and network drives, refer to the following **Caution**.

CAUTION: You *cannot* enter a network path such as: `\\machine_name\network_share` If you enter a network path instead of a mapped drive, the installer will give an error. When you click Browse to select the drive, if the mapped remote drive is not listed, perform these steps:

a. Start a Command Prompt session by right clicking and selecting **Run as Administrator**.

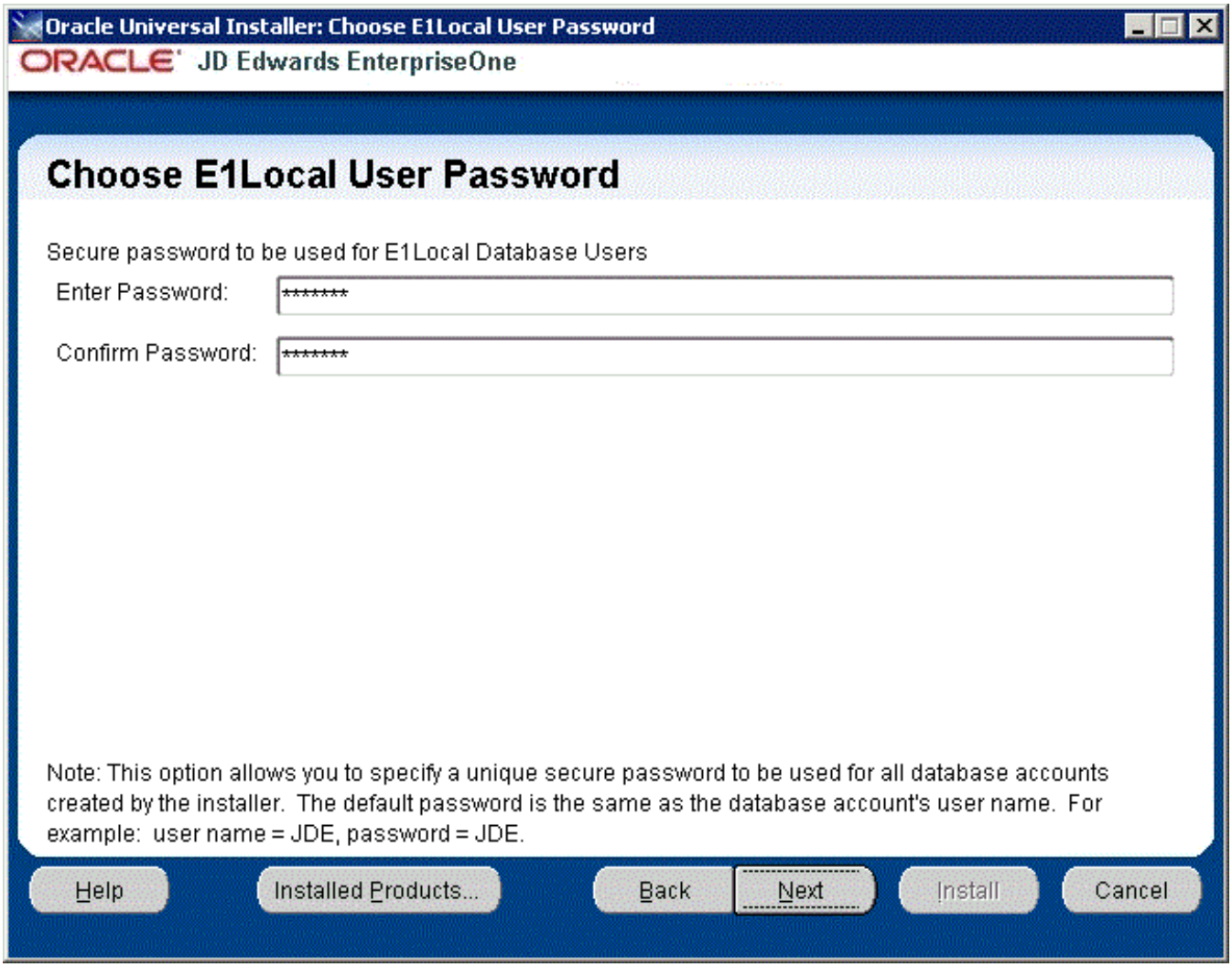
   This command prompt opens on the Microsoft 2012 Server with **Administrator:cmd** in the header.

b. In the command window, type this command:

   ```
   net use z: \\<MachineName>\<SharedPath>
   ```

   where `z:` is the drive on which you mapped drive exists.

14. Select the **Next** button.

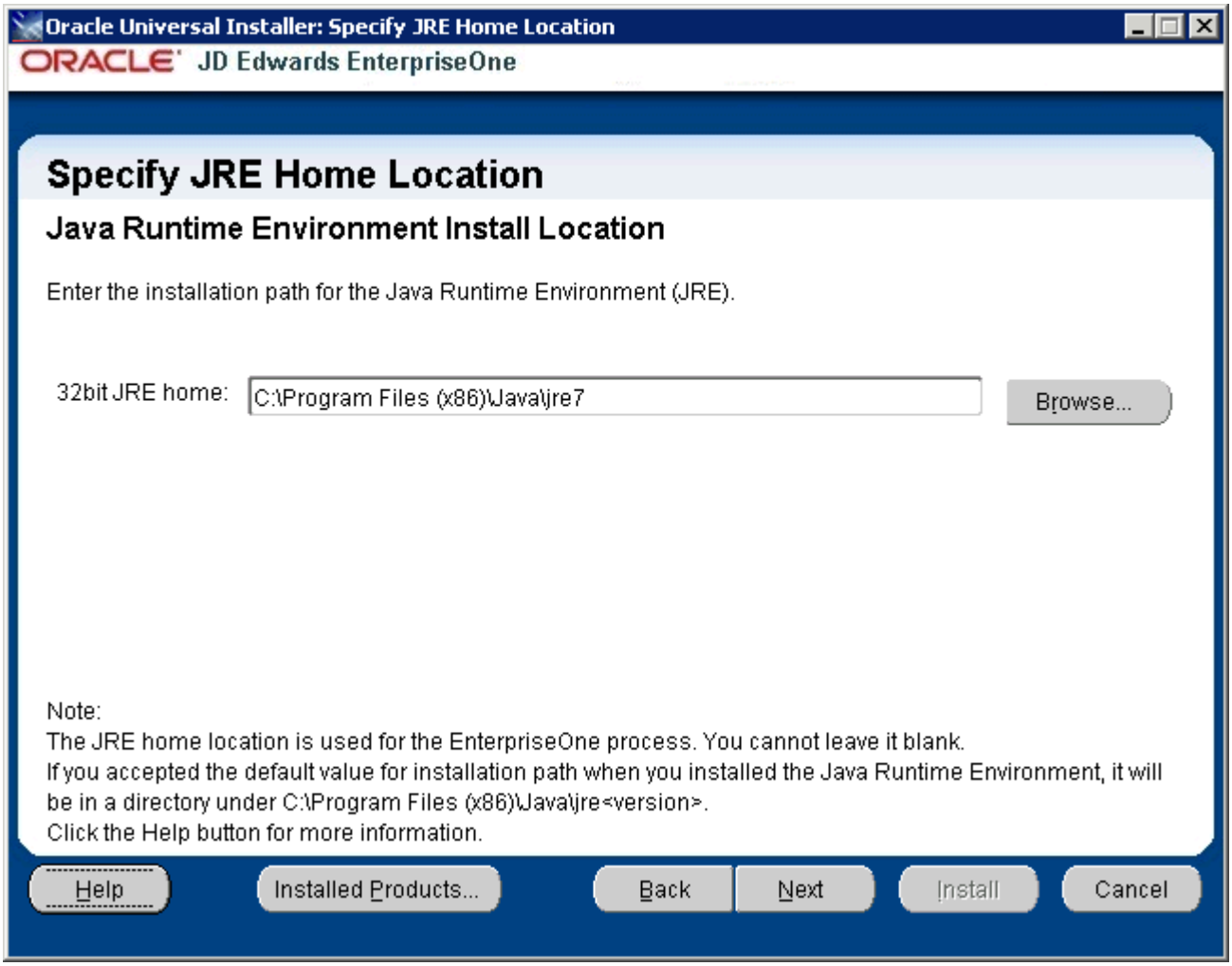


15. On Choose E1Local User Password, you can specify a secure password to be used for the E1Local Database Users on the Deployment Server. This unique password will be used for all database accounts created by the Deployment Server installer.

    The default password is the same as the user name of the database account. For example, if the user name of the local database account is JDE, the default password is JDE.

    If you do not specify a E1Local user password, by default the installer will use this value: **DEFAULT**. You cannot leave this field blank.

    If you change the password, make sure you sign into JD Edwards EnterpriseOne as JDE with the new changed password. You must also make sure to match this new JDE password on the Enterprise Server and/or Database Server for use during the Platform Pack installation.



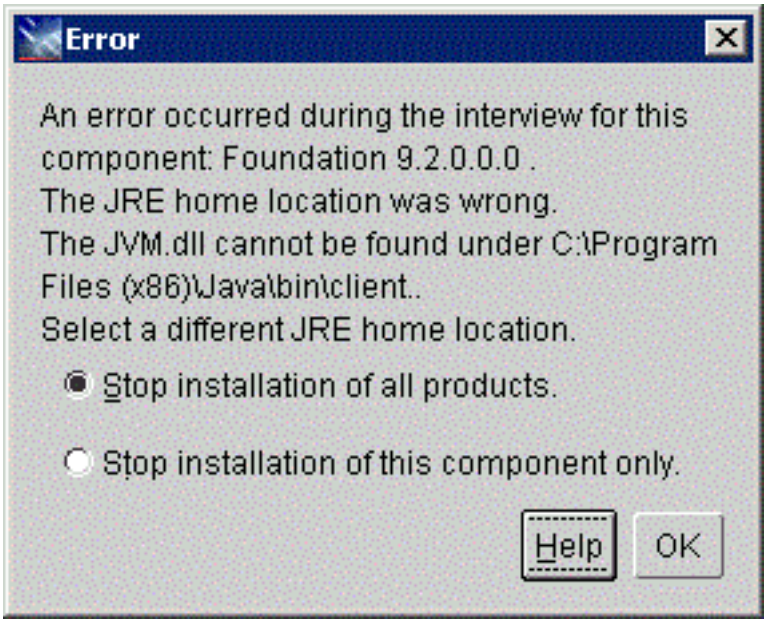
16. On Specify JRE Home Location, enter the installation path for the Java Run Time Environment. You must either enter a path or click the **Browse** button to select a path to the root directory of a JRE installation, which is usually the directory containing the `\bin` and `\lib` directories for the JRE.

    Note: The JRE Home Location is required for use by JD Edwards EnterpriseOne processes. You cannot leave it blank. If you accepted the default value for the installation path when you installed the Java Runtime Environment, it will be in this directory: `c:\Program Files (x86)\Java\jre<version>` For additional information, click the **Help** button on this screen.

    CAUTION: Ensure the JRE version level you specify here is supported by the Oracle Certification for the Deployment Server running JD Edwards EnterpriseOne Release 9.2 and greater. Also for JD Edwards Release 9.2, only 32-bit versions of the JRE are supported. The installer verifies the bitness of the JRE you specify here.

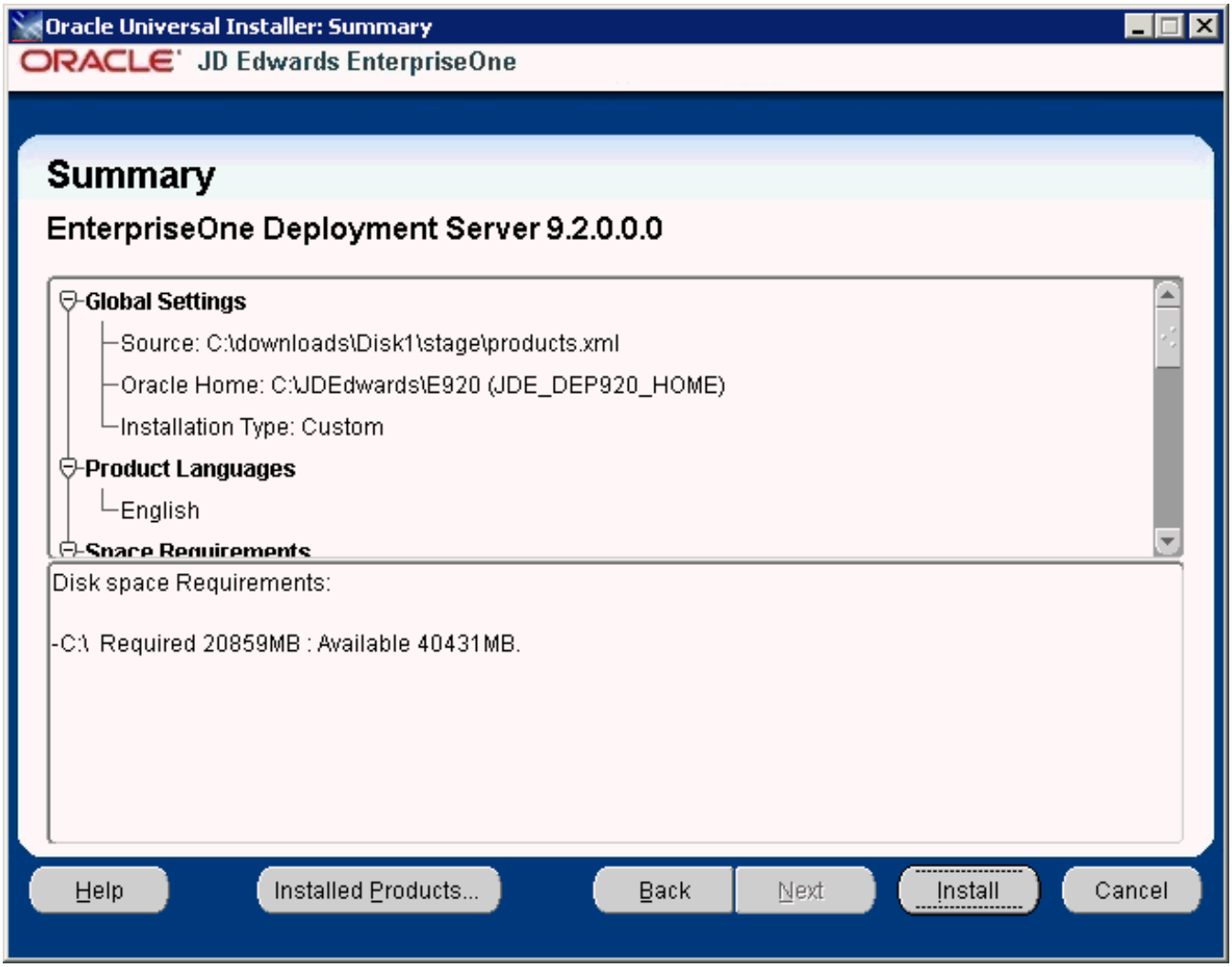
17. Select the **Next** button.

    The installer validates the specified location for the JRE. If the location is invalid (as indicated by the presence or absence of the expected `JVM.dll`), the following error message is displayed:



    If you received an error indicating an invalid JRE location, click the **OK** button and specify a valid value.

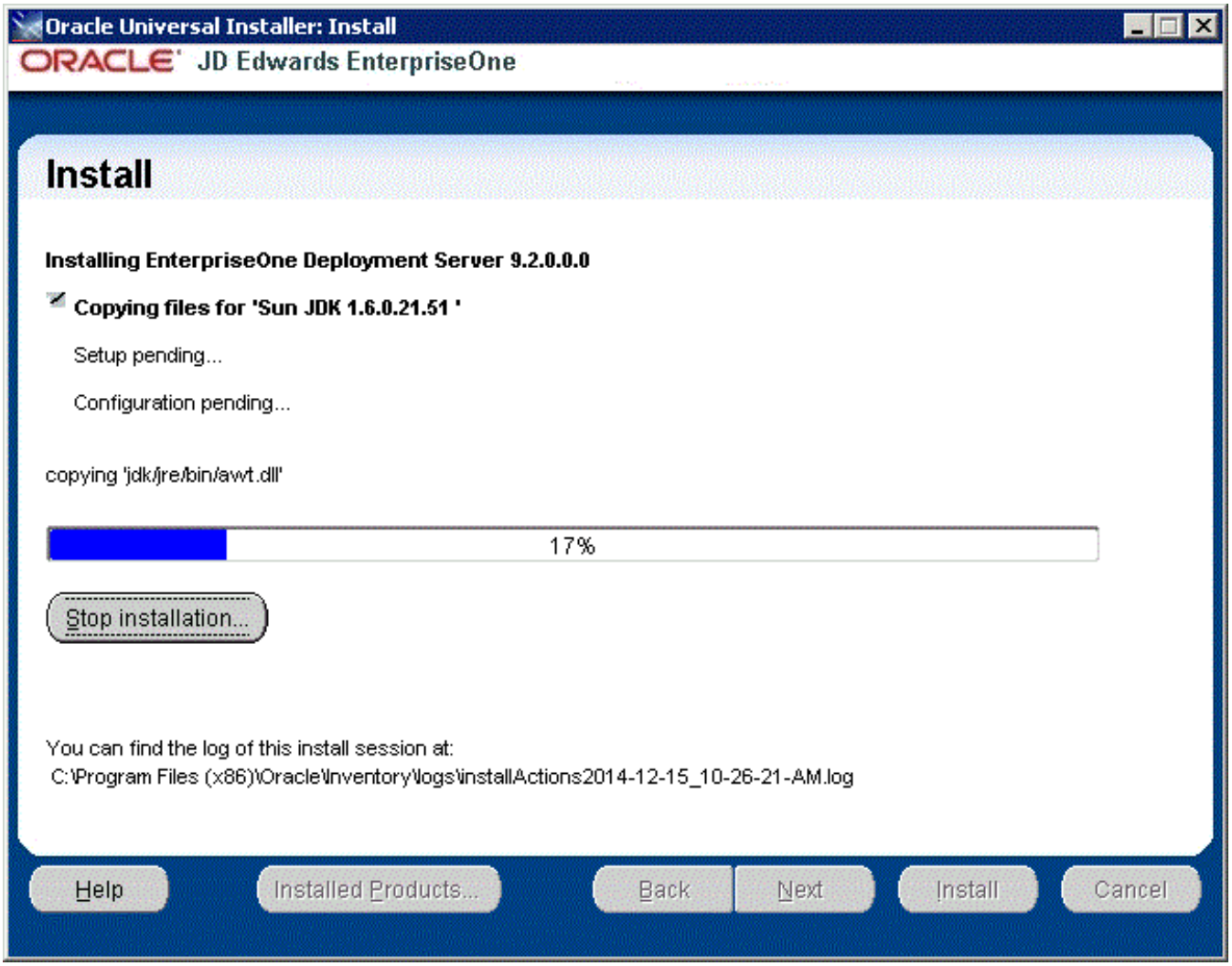
    If the value you selected for the JRE location is valid, the installer proceeds and display the Summary screen. Below is a sample Summary from a Custom installation type.



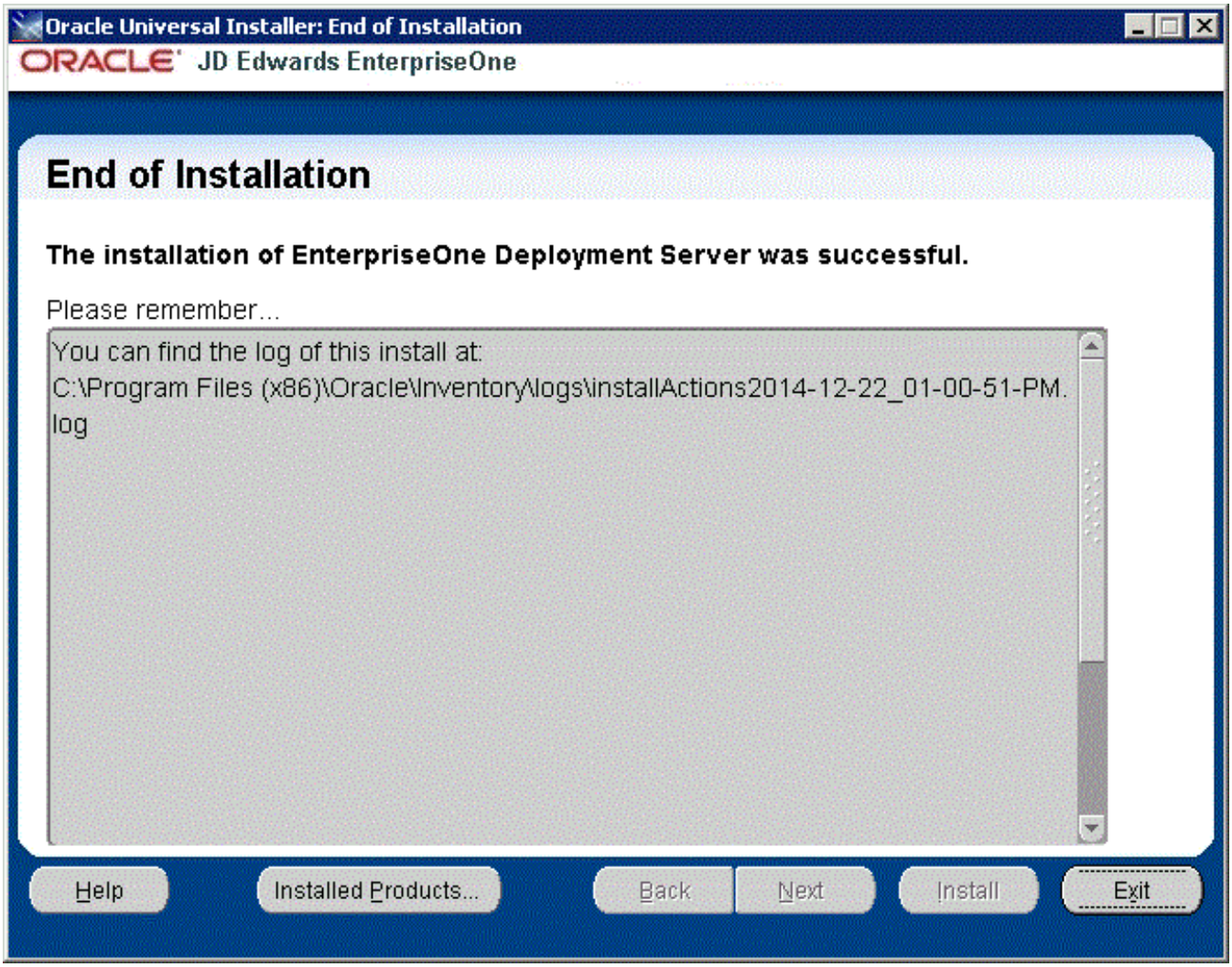
18. On Summary, verify the list of items to be installed is correct.

    If there is insufficient disk space to complete the installation on the Deployment Server target machine, an error message is displayed.

19. Click the **Install** button.



The JD Edwards EnterpriseOne Deployment Server Installer displays a panel showing the ongoing status of the installation.



20. When the installation of the Deployment Server finishes, the **End of Installation** screen is displayed.

> **CAUTION:** *Examine the Installer Logs.* Even though the screen indicates that the installation was successful, you should always check the logs before you attempt to run the Deployment Server. The file is named `log.txt` and is located in the Deployment Server installation directory. For example: `C:\Program Files (x86)\Oracle\Inventory\logs\InstallActions\ installActionsyyyy-mm-dd_hh-mm-ssPM.log` For additional details on log file names and location, refer to the section of this chapter entitled: *Oracle Database Installer Logs*.

21. On End of Installation, select the **Exit** button.

Updating the Enterprise Server Port Number in the jas.ini File

After the Deployment Server installer completes, it delivers a **jas.ini** file in the following directory:

```
X:\E920_1\system\JAS\webclient.ear\webclient.war\WEB-INF\classes
```

You must verify that the **jas.ini** file on the Deployment Server in the above location is set to the correct **serviceNameConnect** port address for JD Edwards EnterpriseOne Tools Release 9.2.x, which *must* be **6017**. This setting is shown below:

```
[JDENET]
# Enterprise Server JDENET port
serviceNameConnect=6017
```

Additionally, in the same **jas.ini** file, ensure the **serviceNameConnect** port value setting for the HTML Server (also known as JAS) is set to a different value than that specified for the Enterprise Server. For example:

```
# JAS Server JDENET Listening port
serviceNameListen=6016
```

Examine the Local Database Installer Logs

Even though the screen indicates that the installation was successful, you should perform the following checks to verify that the database truly installed correctly:

1. **Examine the log file**
    - The log file is in this folder:

      C:\Program Files\Oracle\Inventory\logs
    - The log file name is named:

      cloneActionsyyyy-mm-dd_hh-mm-ssAM|PM.log

      where the syntax is:

        - **yyyy** is the year
        - **mm** is the month
        - **dd** is the day of the month
        - **hh** is the hour
        - **mm** is the minutes
        - **ss** is the seconds
        - **AM|PM** is either AM or PM
        - For additional details on log file names and location, refer to the section of this guide entitled: *Oracle Database Installer Logs*.

2. **Verify that the Oracle database services exist and are running**

   a. From the Microsoft Windows Control Panel, navigate to Administrative Tools > Services.
   b. In the list of Services, look for these services:

      OracleE1LocalTNSListener

      OracleServiceE1LOCAL
   c. If either of the above services is missing, it indicates that there was a problem in completing all the installation and configuration steps. You should examine the logs specified in the table in the section of this guide entitled: *Oracle Database Installer Logs*.

      To remedy you will probably need to deinstall the database engine using the steps in the section of this guide entitled: *Using the OUI Installer to Uninstall JD Edwards EnterpriseOne from the Deployment Server* , reboot the Deployment Server machine, and then reinstall the Oracle database.

Generate a Site Key

Important: As a Post Deployment task for the Deployment Server, you must generate a Site Key prior to running the Platform Pack to create an Enterprise Server.

Starting with EnterpriseOne Tools Release 9.2, the EnterpriseOne encryption system uses a Site Key to add a higher level of security for sensitive data stored in configuration files and databases. The Site Key is combined with other values to create an AES key. The encryption system then uses the AES key to encrypt individual data items. Encryption using AES is the industry-standard for achieving a highly secure encryption.

The Site Key values are not stored in the program code. Because Site Keys are stored and encrypted in the `JDE.INI` file, each customer has their own Site Key, which provides a higher level of security.

> **CAUTION:** You must set a Site Key value before Site Key can begin encrypting your sensitive data that are entered through Server Manager.

For details on using Site Key with JD Edwards EnterpriseOne, refer to the *JD Edwards EnterpriseOne Tools Security Administration Guide* in the chapter entitled: *Encrypting Sensitive Data in EnterpriseOne* .

Adding Additional Environments (Rerunning the Deployment Server Installer)

> **CAUTION:** If you want to add an additional environment that you did not install when you first ran the Deployment Server Installer, you must re-run the installer from the **original disk image**. You cannot re-run the installer using the OUI-based installer.

To rerun the Deployment Server Installer, follow the instructions in the preceding section of this chapter entitled: *Working With the OUI Installer to Install the Deployment Server*

Using Server Manager to Install the Tools Release

Although the process to install the Deployment Server itself remains via an OUI installer, for Release 9.2, you must use Server Manager to install or change a tools release on the Deployment Server. The following list of procedures are fully documented, where:

- Installation procedures are provided in the *Server Manager Installation Guide*.
- Configuration instructions are provided in the *JD Edwards EnterpriseOne Server Manager Guide* , which is located in the both the *Installation* and *Upgrade* libraries for JD Edwards EnterpriseOne on the Oracle Technology Network (OTN) at this link:

  `https://docs.oracle.com/cd/E61420_01/doc.92/e61438/toc.htm`

Tip: The links to the Server Manager Guide that are provided in the below steps are "live" only in the HTML version of this guide.

1. Install a Management Agent on the Deployment Server. This should be the Tools Release 9.2 version of the Microsoft Windows version of the JD Edwards EnterpriseOne Management Agent.

   Refer to the *Server Manager Installation Guide*.

   Note: The installer for the Management Agent requires a 32-bit JRE.

   If you are installing the base Tools Release 9.2, you can use the same JRE that you used to install the Deployment Server using the OUI installer, which is described in the section of this guide entitled: *Running the JD Edwards EnterpriseOne Deployment Server Installer*.

   If you are installing a Tools Release Greater than the Base Release, ensure that the requisite JDK on the Deployment Server meets the version requirements as specified in Oracle Certifications. If you need to upgrade the JDK, you should do so before you use Server Manager to deploy the new Tools Release. If an upgraded JDK version is applied on the target machine, it must be manually copied to the `..\system\jre` folder on the Deployment Server for use by the Tools Release for JD Edwards EnterpriseOne.
2. Register the Deployment Server to the Server Manage Console.

   Refer to this chapter in the Server Manager Guide:

   Register a JD Edwards Deployment Server as a New Managed Instance

3. Obtain and deploy the Tools Release software component for the Deployment Server.

   Refer to this chapter in the Server Manager Guide:

   Managed Software Components

   > **Note: Changing Tools Releases on the Deployment Server From a Release Prior to Release 9.2.** When you use Server Manager to install the Software Component for a Tools Release prior to 9.2 on a Deployment Server, these two directories (which are the entire contents of the Tools Release portion of the Deployment Server) are backed up in a `.jar` file:
   >
   > - `\System`
   > - `\OneWorld Client Install`
   >
   > Therefore, when you use Server Manager to change a Tools Release prior to 9.2 on the Deployment Server, only those directories are restored. For Tools Release 9.2 and greater, the Server Manager install of the Tools Release performs differently because the contents are already stored in a `.jar` file where they can be extracted. In all cases, whenever Server Manager installs or changes a Tools Release, additional special files such as certain `.ini` and `.html` files are backed up. To fully preserve a Deployment Server, you should manually perform a full backup of the machine.

Installing the Latest Planner Update and Running the Special Instructions

> **CAUTION:** You must start Change Assistant **as Administrator**. Right-click on the shortcut and select '**Run as Administrator** from the drop-down.

> **Note:** The order in which the following Tools Release and updates are applied is very important. Do not deviate from the order described in these procedures.

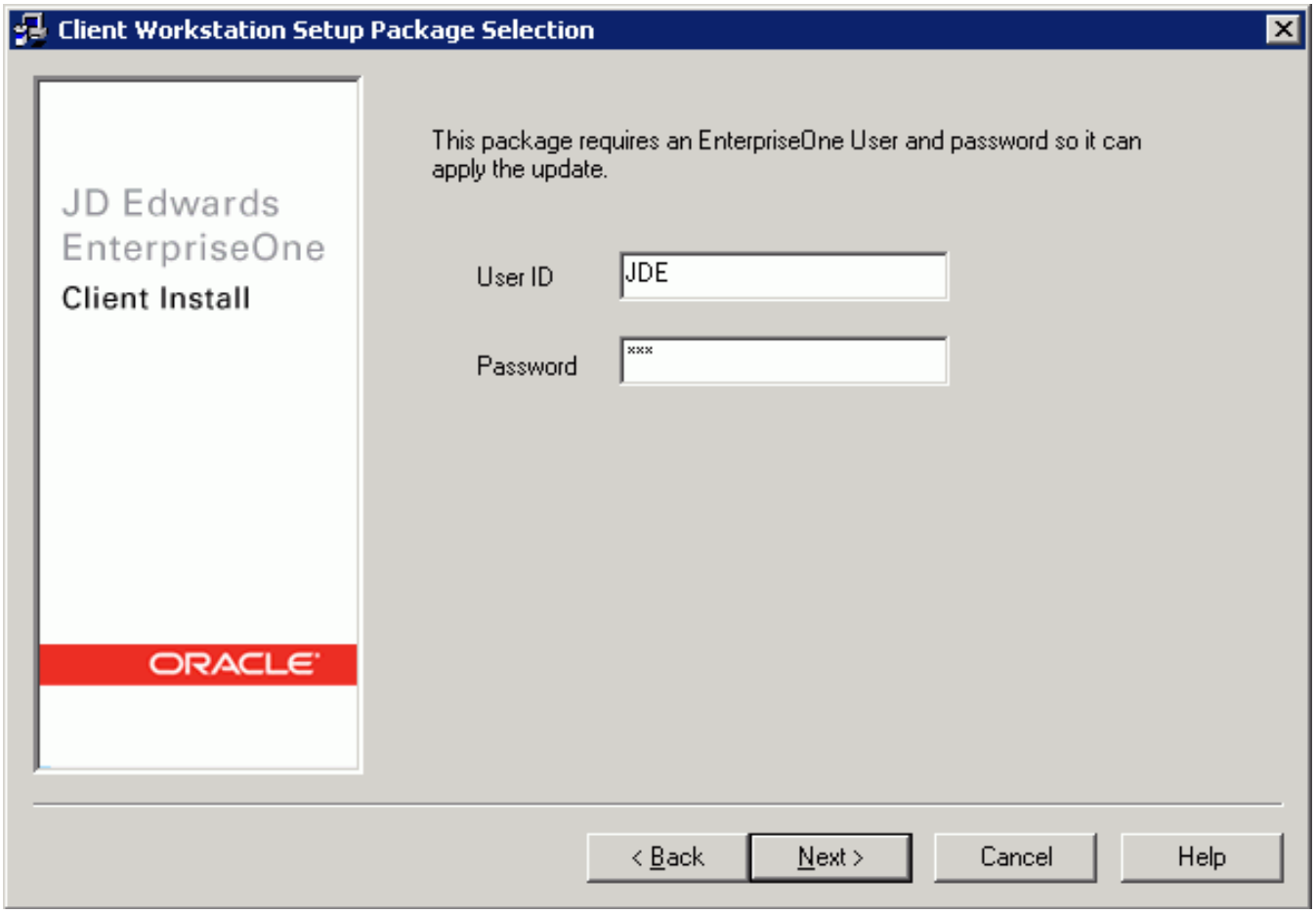
> **CAUTION:** As part of the local database installation, which is bundled with the Deployment Server Installer, the password for the **SYSTEM** and **SYS** for Oracle database user accounts on the E1Local database is encrypted. If you reset this password, several JD Edwards EnterpriseOne functions will fail. If you should inadvertently reset the password, you can encrypt it again to the expected default password. Refer to the section of this guide entitled: *Oracle Enterprise Edition*.

To install the latest planner update:

1. From My Oracle Support, download the latest planner update for your Tools Release to the Deployment Server.

2. Right click on the self-extracting executable and click on **Run As Administrator** and follow the on-screen instructions to install the planner update on the Deployment Server.

> **CAUTION:** You **must** apply the Planner Update ESU to the Pristine environment in order to get the latest Table Conversion changes, among other important changes. You must right-click on the executable and select **Run as Administrator** from the drop-down.



3. You must enter a valid *JD Edwards EnterpriseOne* user and password to initialize the Planner.

   The shipped values are JDE for the user and JDE for the password.

> **Note:** The above login screen is displayed so the Planner Update can update the metadata specifications on the Deployment Server.

4. When the installation finishes, view the *JD Edwards EnterpriseOne* Deployment Server Setup form to confirm that the installation was successful.

   Tip: If the folder into which you expanded the Planner Update is empty, you should run the self-extracting executable (`JMnnnnn.exe`) again. When the Welcome screen comes up, click on Cancel to quit.

5. Follow the steps in the Special Instructions, which are contained within an HTML file that is shipped with the Planner Update. The special instructions file is in this directory with this file name:

   `x:\download_directory\planner_update_id\ E920 SpecialInstructions.htm`

   where `download_directory` is the directory where you downloaded the Planner Update.

   CAUTION: Every time you apply a new Planner Update you must run both of these:
   - `SpecialInstrs.bat`
   - **R98403XB XJDE0002**

Troubleshooting Deployment Server Installation

For Troubleshooting the Deployment Server, refer to these sections in *Troubleshooting the Deployment Server Installation* of this guide:

- *Verify Local Planner Tablespaces are Not Attached*
- *Oracle Database Installer Logs*
- *Configuration Files*
- *Path Code Master (F00942)*
- *Oracle Enterprise Edition*

4 Working with the Platform Pack on the IBM i

Understanding the Platform Pack

The Platform Pack installs these major components:

- *JD Edwards EnterpriseOne* Server code
- *JD Edwards EnterpriseOne* database tables

Note: To reinstall any Enterprise Server components, refer to *Rerunning the Platform Pack Installer*.

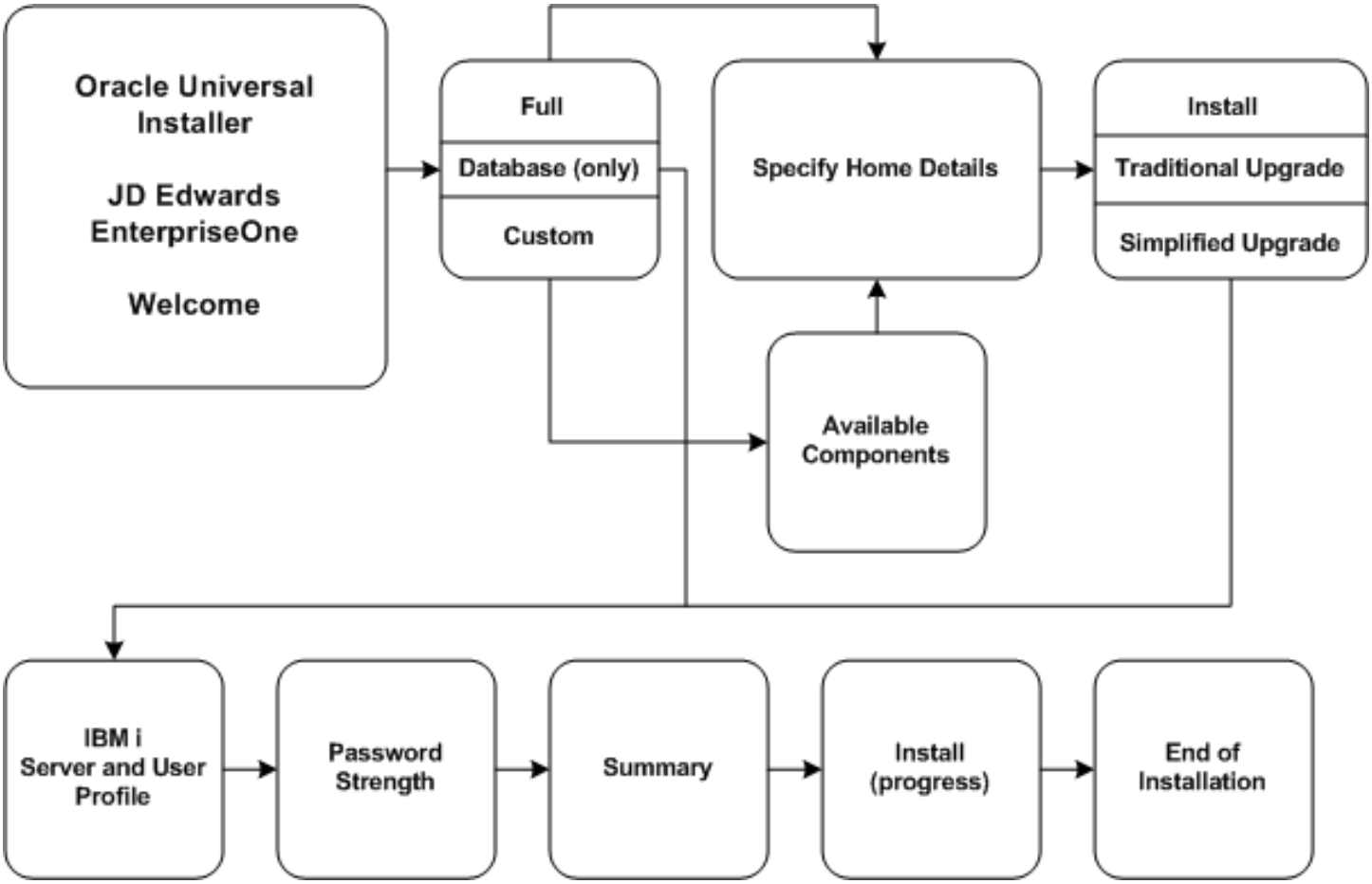
This table lists the mandatory and optional components of the Platform Pack installation:

Server	Mandatory Component	Optional Components
Enterprise Server	*JD Edwards EnterpriseOne* Foundation	ES Production ES Prototype ES Development ES Pristine
Database Server	System Database	Production Databases Prototype Databases Development Databases Pristine Databases

Platform Pack Process Flow

The Platform Pack installation process upgrades *9.0* system and path code files.

The diagram below illustrates the process flow for the Oracle Universal Installer for the JD Edwards EnterpriseOne Platform Pack.



Configuring the Enterprise Server Prior to Installing the Platform Pack

Install any *IBM i* server upgrades that are required to support *Release 9.2* .

Before you install *Release 9.2* software on the IBMi Enterprise Server, you must create the *Release 9.2* administrator user, verify disk space, and set up and verify the hosts file.

This section discusses:

- *Understanding the Prerequisites*
- *Understanding Security for the Platform Pack Installer*
- *Setting the System Values*
- *Setting up the TCP\IP Protocol for Enterprise Server*
- *Setting up Access on your Enterprise Server*

- *Starting the Remote Database TCP\IP Service (Optional)*
- *Optimizing Machine Resources*
- *Cleaning Up From Prior Installations*
- *Testing Long File Names on the*
- *Checking for Co-existence Tables*
- *Adding Entries to the System Reply List*
- *Rebuilding Cross Reference Tables on the*

Understanding the Prerequisites

Verify this list of prerequisites is met prior to installing the *JD Edwards EnterpriseOne* Platform Pack on your *IBM i* -based Enterprise Server:

- Refer to the Section 1.7, "Language Process Overview" for the National Language Support tables and other information related to multilingual installations.
- Install the requisite *IBM i* upgrades.
- Verify that you have met the hardware and software requirements (called Oracle Certifications) for *Release 9.2* . Refer to the section of this guide entitled: Section 1.4.1, "Accessing Certifications".
- If you prefer to perform the configuration tasks in this chapter (set up TCP/IP and *IBM i* Access) in a language other than the language for which the *IBM i* is currently configured, change the value for the code character set ID. For example, to perform these configuration tasks in English, set the code character set ID to 37. After completing these configuration tasks, reset the code character set ID to its original value.

Understanding Security for the Platform Pack Installer

The following is a list of security actions performed by the *JD Edwards EnterpriseOne* Installer:

1. Recreates the ONEWORLD job description.
2. Creates the user profiles for JDE and ONEWORLD, each with user class *PGMR.
3. Grants the JDE user rights to the ONEWORLD user profile.
4. Grant rights to QRECOVERY library for users JDE and ONEWORLD so that they can create SQL Packages in there for UBEs and CALLOBJ kernels.
5. If the PSFT user profile exists, for each environment that you are upgrading, uses GRTOBJAUT to grant authority for all tables in business data and control tables for JDE.

Setting the System Values

Because the *JD Edwards EnterpriseOne* Platform Pack Installer cannot run with the default QJOBMSGQFL system value, you may need to change it.

To verify the existing QJOBMSGQFL system value, and change if necessary:

1. Enter this command:

   ```
   WRKSYSVAL QJOBMSGQFL
   ```
2. Enter option 5.

If the value displayed is *NOWRAP, you must change it to *WRAP or *PRTWRAP. Be sure to note the existing value so you can reset it after you complete the *JD Edwards EnterpriseOne* Platform Pack installation.

To allow the *JD Edwards EnterpriseOne* services to run, you must change the value for QUSEADPAUT to *NONE before installing the Enterprise Services. Then once the *JD Edwards EnterpriseOne* Platform Pack installation is complete, you can change this value back to its original setting.

To set the system values:

1. Enter this command:
   `WRKSYSVAL QUSEADPAUT`
2. Enter option 5.
   If the value displayed is anything other than *NONE, you must change from that value to *NONE. Be sure and note the existing value so you can reset it after you complete the installation of the *JD Edwards EnterpriseOne* Platform Pack.

Setting up the TCP\IP Protocol for Enterprise Server

Note: Set up the TCP\IP service to start automatically each time you IPL the *IBM i* . For more information about setting it up, contact your system administrator or see the appropriate IBM documentation.

To set up the TCP\IP protocol for your *IBM i* Enterprise Server:

1. Log on to the Enterprise Server as QSECOFR (or as any user who can access the Configure TCP\IP menu).
2. On Current OneWorld Versions, choose the version of the software for which you are setting up the TCP\IP protocol.
3. To access the Configure TCP\IP menu, enter `CFGTCP`.
4. Select Work With TCP\IP Host Table Entries.
5. On Work With TCP\IP Host Table Entries, find the network (Internet) address for the Enterprise Server.
   A single machine could have more than one entry for the same network address. Verify that an entry exists for the Enterprise Server network address and that it matches the format that follows. Search for the Enterprise Server network address by entering the Enterprise Server name only (for example, SYS1). If one does not exist, you must add one by choosing Add.
   In the Host Name field, your Enterprise Server (machine) name should appear in this format:
   `hostname.domainname`
   where **`hostname`** is the name of your machine and **`domainname`** is the local domain of the machine on the network. For example, **`SYS1.MFG.ABC.COM`**, in which SYS1 is the Enterprise Server name and **`MFG.ABC.COM`** is the domain name. The combined Enterprise Server name and local domain name represent the location of the Enterprise Server on the network.

   Note: *Network Considerations.* To avoid problems when applications running on separate machines need to communicate with applications running on other machines on the same network, make sure that each machine name (host name) has a single unique dot decimal address. For example, SYS1 could have a dot decimal address of, for instance, 140.252.13.33, but you could not assign any other address to it.
6. To verify that the local domain and Enterprise Server names represent the correct location of the *IBM i* , choose Change Local Domain and Host Names from the Work With TCP\IP Host Table Entries form.

Verify that the Local Domain Name and Local Host Name fields match the combined **hostname.domainname** network address.

Following the example in this task, the local domain name would be **MFG.ABC.COM** and the local host name would be **SYS1**.

Setting up IBM i Access on your Enterprise Server

The *IBM i* Access terminal emulation program enables Development Clients to communicate with *IBM i* servers. This task describes the procedure to set up the component of *IBM i* Access that runs on the *IBM i* server.

To set up *IBM i* Access on your *JD Edwards EnterpriseOne* Enterprise Server:

1. To determine the number of prestart jobs that are available and have been submitted for program QZDASOINIT, enter this command:

   DSPACTPJ QUSRWRK QSYS\QZDASOINIT

   Information about the number of your system's prestart jobs, prestart jobs submitted, and program start requests appears.

   The number of prestart jobs depends on the number of concurrent and active ODBC user connections. This change is iterative as users or applications are added or removed. If you do not have enough prestart jobs, your system could be slow to make connections. If connections fail, they could be successful with the second attempt. If too many prestart jobs are waiting, the system will end some of them automatically. Also, the system initiates prestart jobs as additional ones are submitted.

   > **Note: Troubleshooting.** To determine the number of prestart jobs you should set up, be aware that each OneWorld user typically uses three to five ODBC connections. Each ODBC connection uses one QZDASOINIT program. Therefore, the initial value for QZDASOINIT could be set to four times the number of expected concurrent connected users.

   The current maximum number of prestart jobs is 9,999. If more jobs are needed, they will be created as necessary.
2. To see the current settings, enter this command:

   DSPSBSD QUSRWRK
3. Choose option 10, and then choose option 5 for program QSYS\QZDASOINIT.
4. To access the form on which you can change the number of prestart jobs, enter this command and press F4 to prompt:

   CHGPJE
5. Change the number of prestart jobs as needed, and then press Enter.
6. Restart the QUSRWRK subsystem for your changes to take effect.

Starting the Remote Database TCP\IP Service (Optional)

If your installation will have separate *IBM i* machines for the Enterprise Server and the Data Server, you will need to start the remote database TCP/IP service on the Enterprise Server.

To start the remote database TCP/IP service:

1. Enter this command:

   ```
   STRTCPSVR SERVER(*EDRSQL)
   ```

2. In order to change the attribute of this server to autostart when TCPIP starts, you will need to use *IBM i* Navigator from a Microsoft Windows client:

   a. Open the node for your *IBM i* machine.
   b. Open the Network node.
   c. Open the Servers node.
   d. Double click on TCPIP.

   A list of TCPIP servers is displayed in the right hand pane.

   e. Right click on EDRSQL, select Properties, and enable the option *Start when TCP\IP Starts*.

   > **Tip:** You can also start and stop this server from this screen.

Optimizing Machine Resources

Ideally you should run the Platform Pack Installer when the machine is not busy. However, if there are other processes running on the same *IBM i* as the Installer, their performance will be impacted by the Platform Pack installation.

The Platform pack install uses a prestart job in the QUSRWRK subsystem (program QZRCSRVS) which does Restores. This job runs at priority 20. In order to reduce the performance impact of this job, you can change its run priority during the install.

To change the run priority of the install job running in the QUSRWRK subsystem and optimize machine resources:

1. Enter this command:

   ```
   WRKACTJOB SBS(QUSRWRK)
   ```

2. Look for the job running program QZRCSRVS, type option 5 next to it, and press Enter.

   If there is more than one job running QZRCSRVS, the one using the most machine resources is most likely the one running the Platform Pack Installer. You can also check the job logs to find jobs unique to the Platform Pack Installer. Examples of such jobs are restores and CHGOBJOWN.

3. For the job you selected in the previous step, enter option 40 (change job) press Enter.
4. Enter 51 as the Run Priority and press Enter.

Cleaning Up From Prior Installations

If you have previously run the Platform Pack installer on your *IBM i* machine, prior to re-running it you must ensure that all `QACX*` files are cleared from this folder:

```
\tmp\
```

Testing Long File Names on the IBM i

Before running Installation Workbench, you may need to rebuild the cross-reference table. This table enables tables of long (more than 10 characters) file names to be created on the *IBM i* . Rebuilding the table causes your system to be in a restrictive state. Coordinate this activity with the system administrator.

To test long file names on the *IBM i* :

1. Log on to the *IBM i* as QSECOFR.
2. On the command line, enter STRSQL.

   This command will start a SQL session on the *IBM i* .
3. To test a long file name, enter this SQL statement:

   ```
   CREATE TABLE QGPL\LONGFILENAME (FIELD CHAR(10))
   ```

   where *LONGFILENAME* is the name of your file.

   Your system is ready if the file is created in the QGPL library. You can ignore the journal setting.
4. To remove the file that you just created in the QGPL library, enter the following SQL statement:

   ```
   DROP TABLE QGPL\LONGFILENAME
   ```

   > **Note:** If you are unable to create the table with a long name, likely your system cross reference tables are corrupt. You must rebuild them before proceeding. Refer to *Rebuilding Cross Reference Tables on the*.

Checking for Co-existence Tables

Before running the Table Conversion Workbench, you must check whether any of your tables are in Co-Existence (DDS) format. If you run Table Conversions against DDS format tables it will lead to data corruption and cause TCs to fail.

Use this procedure to check for co-existence tables:

1. Log on to the IBM i as QSECOFR.
2. On the command line, start a SQL session by entering this command:

   ```
   STRSQL
   ```
3. Run the following SQL statement, substituting in your Control Tables and Business Data library names

   ```
   SELECT TABLE_SCHEMA, TABLE_NAME, TABLE_TYPE FROM SYSTABLES WHERE TABLE_SCHEMA
   IN ('PRODCTL','PRODDTA') AND TABLE_TYPE = 'P'
   ```

   where

   `TABLE_TYPE='P'` is DDS (World-created) tables

   `TABLE_TYPE='T'` is SQL (EnterpriseOne created) tables

   If there are DDS created tables in these libraries, you must follow the additional procedures in the Co-Existence Upgrade Guide (Doc ID: 702770.1), which is located on My Oracle Support.

Adding Entries to the System Reply List

To add entries to the System Reply List:

1. Verify the existing entries in the Reply List with this command:

   ```
   WRKRPYLE
   ```
2. Verify that this entry does not exist and that the sequence number **3283** has not been used:

   ```
   ADDRPYLE SEQNBR(3283) MSGID(CPA32B2) RPY('I')
   ```
3. If the above entry does not exist, you can add it using this command:

   ```
   ADDRPYLE SEQNBR(3283) MSGID(CPA32B2) RPY('I')
   ```

Rebuilding Cross Reference Tables on the IBM i

To rebuild cross reference tables on the IBM i:

1. Stop all subsystems using this command:

   ```
   ENDSBS *ALL *IMMED
   ```
2. After the jobs have successfully stopped, run the following command:

   ```
   RCLSTG SELECT(*DBXREF)
   ```

   Note that this command may run for as much as several hours.
3. Restart all subsystems using this command:

   ```
   STRSBS QCTL
   ```

   The cross-reference table is now rebuilt and ready for use.

Understanding the Platform Pack Installation on the IBM i

The Platform Pack installation process installs *Release 9.2* system and database files on the *IBM i* . The Platform Pack installer does not run on the IBM i machine; it can only run on a Microsoft Windows machine. Oracle recommends that you run the installer from the JD Edwards EnterpriseOne Deployment Server so that the Oracle Inventory and install history will be preserved. As a prerequisite to running the installer, IBM i Access for Windows must be installed on the Deployment Server.

CAUTION: In some cases the JDEOW library may not be properly updated with the new *JD Edwards EnterpriseOne* programs as expected during the *JD Edwards EnterpriseOne* Upgrade process. To ensure the new *JD Edwards EnterpriseOne* programs are properly installed, rename your existing JDEOW library prior to running the *JD Edwards EnterpriseOne* Platform Pack Installer. To rename JDEOW, run the following command while signed onto your *IBM i JD Edwards EnterpriseOne* server:

```
RNMOBJ OBJ(QSYS\JDEOW) OBJTYPE(*LIB) NEWOBJ(JDEOW_SAVE)
```

Note: If you are installing any JD Edwards EnterpriseOne component on multiple IBM i machines (for example, if you are installing multiple logic servers), you must run the Platform Pack installer from a different Microsoft Windows machine for each separate machine you install. Otherwise, the installer detects that some components (for example Foundation for a logic server) have already been installed, and by design ignores subsequent requests to install the same component, regardless of whether the installation is intended for a different target machine.

Note: Tools Release 9.2.3 and Above If you are running the Platform Pack to install to an environment that contains JD Edwards EnterpriseOne Tools Release 9.2.3 and above, as a prerequisite to running the Platform Pack installer, you must install IBM Access Client Solution with Base and Windows Application Package. You must install this product and its packages on the Deployment Server.

Running the JD Edwards EnterpriseOne Platform Pack Installer for the IBM i

The user profile you specify during the Platform Pack install must not be limited by network security. Most of the Platform Pack install is done through commands and JAVA code that uses TCP\IP to send work between various IBM i service jobs. To find out whether there are network security limitations in place:

1. Enter the WRKREGINF command.
2. Page down to the QIBM_QZ* entries which are for the *IBM i* Access Host Servers.
3. Use Option 8 on any of these to see if an exit program is in place.

In addition, a Platform Pack installer failure can occur if any of the RST*xxx* commands have been changed from the IBM defaults relative to the environments in which they can run.

To run the *JD Edwards EnterpriseOne* Platform Pack Installer for the *IBM i* Enterprise Server:

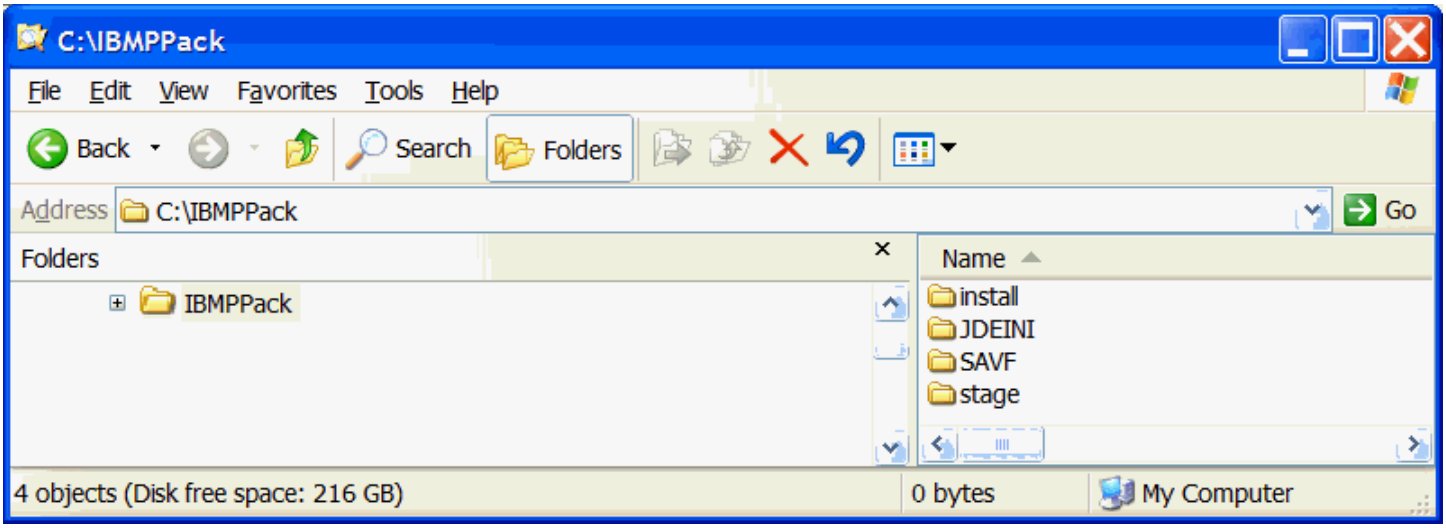
1. Log on to the Microsoft Windows machine where you will be running the Platform Pack installer for *IBM i* . If you follow the recommendation, this will be the JD Edwards EnterpriseOne Deployment Server.

   CAUTION: Ensure that the Administrator account name that you use does not contain any special characters.

2. Create a folder into which you will copy the two .zip files that comprise the Platform Pack image. For example, the folder might be named:

   ```
   c:\IBMPPack
   ```

3. Extract the two zip files within the root of the folder created above. Using the example in this guide, a **correctly** extracted structure is:



4. Locate the `jt400.jar` and `util400.jar` from the location where you installed IBM i Access for Windows. For example, the location might be:

   ```
   c:\Program Files\IBM\Client Access\jt400\lib
   ```

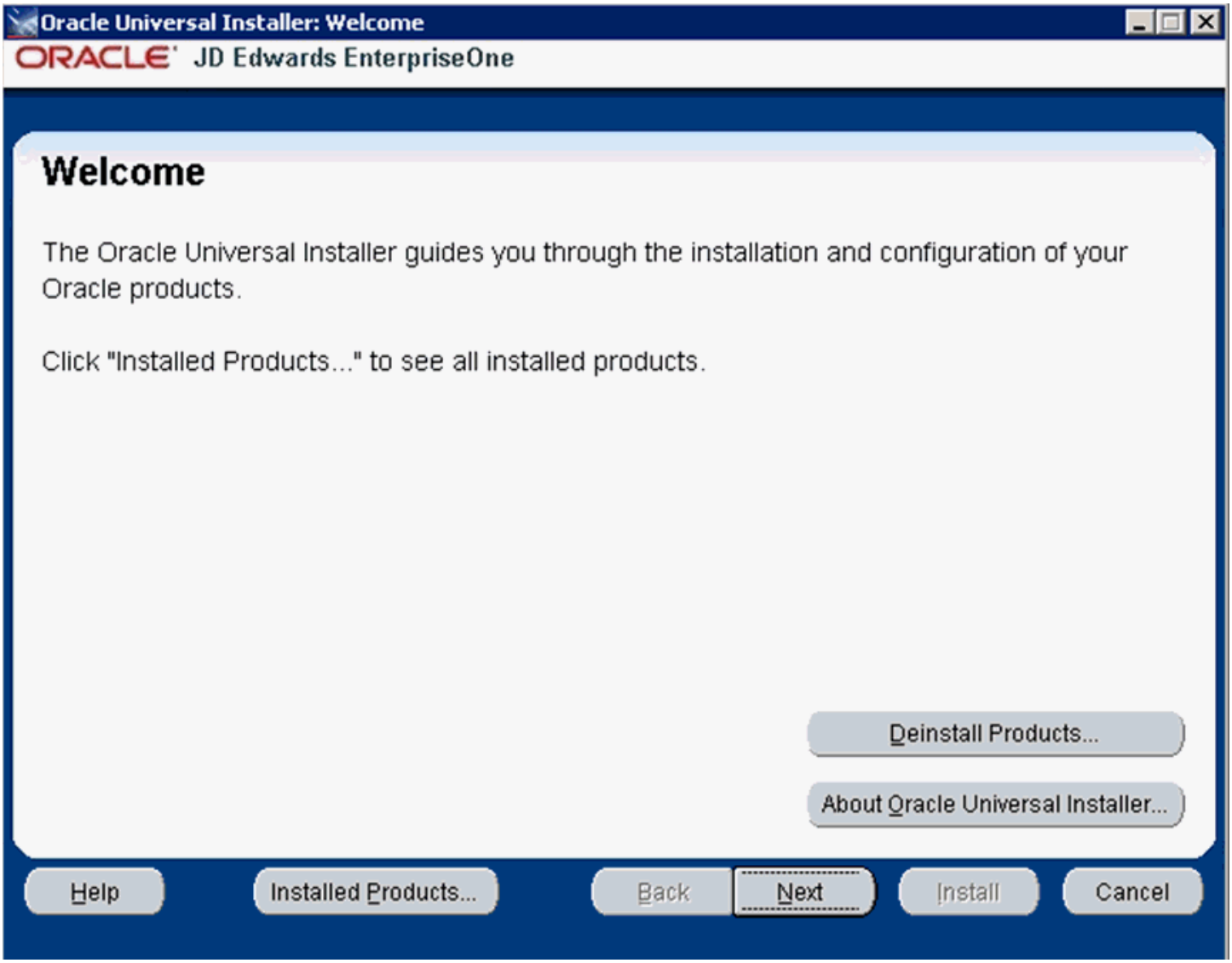
   > **Note:** Because IBM Access Client solution does not ship the `util400.jar`, you will be able to find this file on the IBMi machine in a location similar to this: `/QIBM/ProdData/OS400/jt400/lib`

5. Copy these two `.jar` files to this structure in your install image:

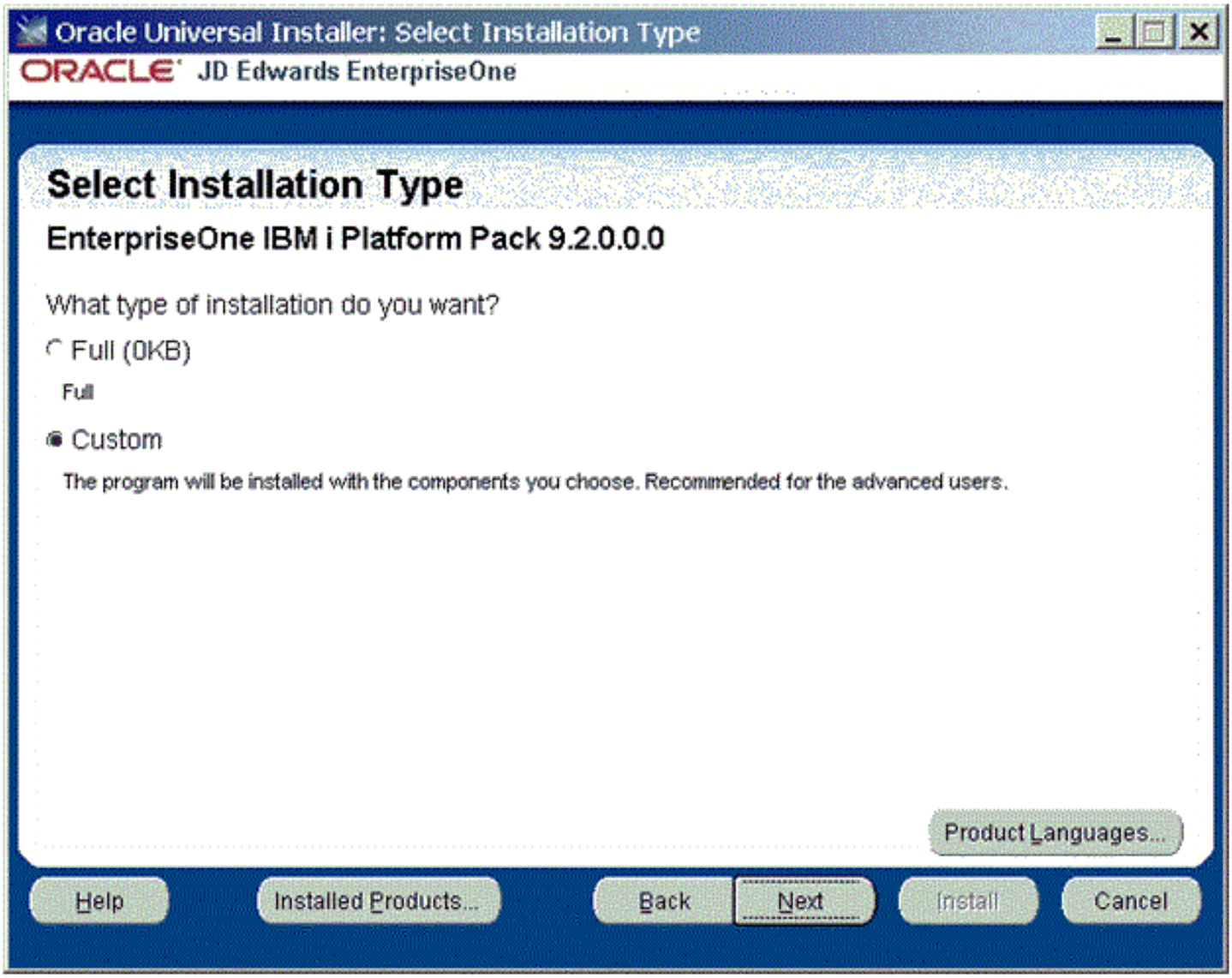
   ```
   ..\stage\ext\jlib
   ```

6. In the above extracted structure, locate the `setup.exe` file under the `\install` subdirectory, right-click on it, and select **Run as Administrator**.

   Note: The Oracle Universal Installer takes a few minutes to start up.


Oracle Universal Installer: Welcome
ORACLE JD Edwards EnterpriseOne
Welcome
The Oracle Universal Installer guides you through the installation and configuration of your Oracle products.
Click "Installed Products..." to see all installed products.
Deinstall Products...
About Oracle Universal Installer...
Help
Installed Products...
Back
Next
Install
Cancel

7. On Welcome, click the **Next** button.



8. On Select Installation Type, choose your installation type:

   - *Custom*

     In most cases this is the mode you should choose for Upgrades.

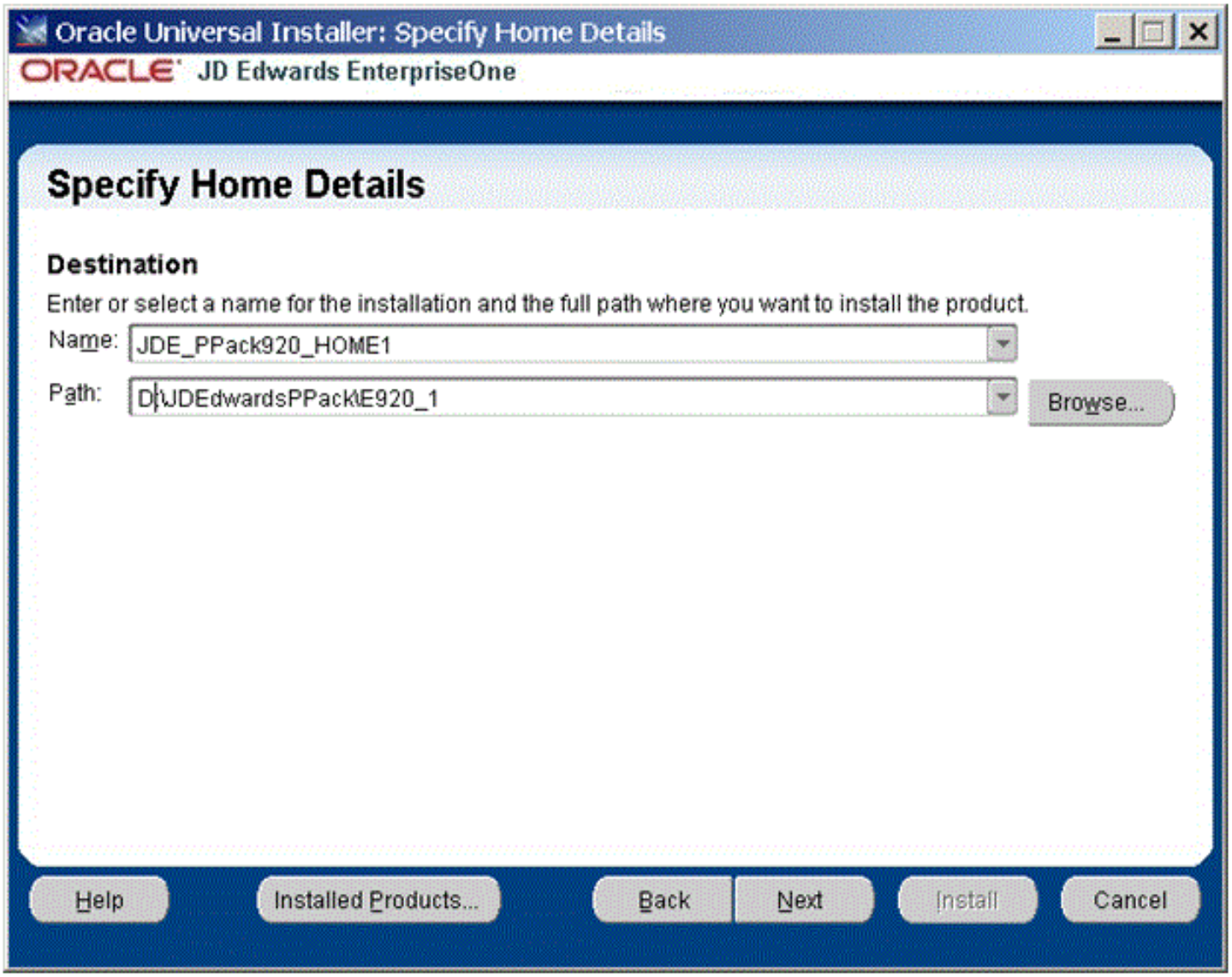
     This mode is recommended for experienced users, choose this setup type if you wish to complete the Platform Pack installation by specifying the installation of a subset of pre-defined environments.

     > **Tip:** If you choose Custom installation, continue with the steps below in this task which immediately follow.

   - *Full*

     Choose this setup type if you wish to complete the Platform Pack installation with no further specifications. This installation option includes the required *JD Edwards EnterpriseOne* files for the Prototype and Pristine environments.

   - Click the **Next** button.


Oracle Universal Installer: Specify Home Details
ORACLE JD Edwards EnterpriseOne
Specify Home Details
Destination
Enter or select a name for the installation and the full path where you want to install the product.
Name: JDE_PPack920_HOME1
Path: D:\JDEdwardsPPack\E920_1
Browse...
Help
Installed Products...
Back
Next
Install
Cancel

9. On Specify Home Details, complete these fields:

   - *Name*

     Enter a unique name for the JD Edwards EnterpriseOne Platform Pack installation. For example:

     JDE_PPack920_HOME

     By default, the installer populates the values on this screen with _1 suffix. The _1 suffix can be removed, if desired. The actual value between Name and Path need not be consistent. It is only used by the Oracle Universal Installer.

     If desired, change the install location from the c: drive. During the installation process itself, only a small amount of disk space is required on the Microsoft Windows machine for the Oracle Inventory for this install and a few temporary text files like `jde.ini`.

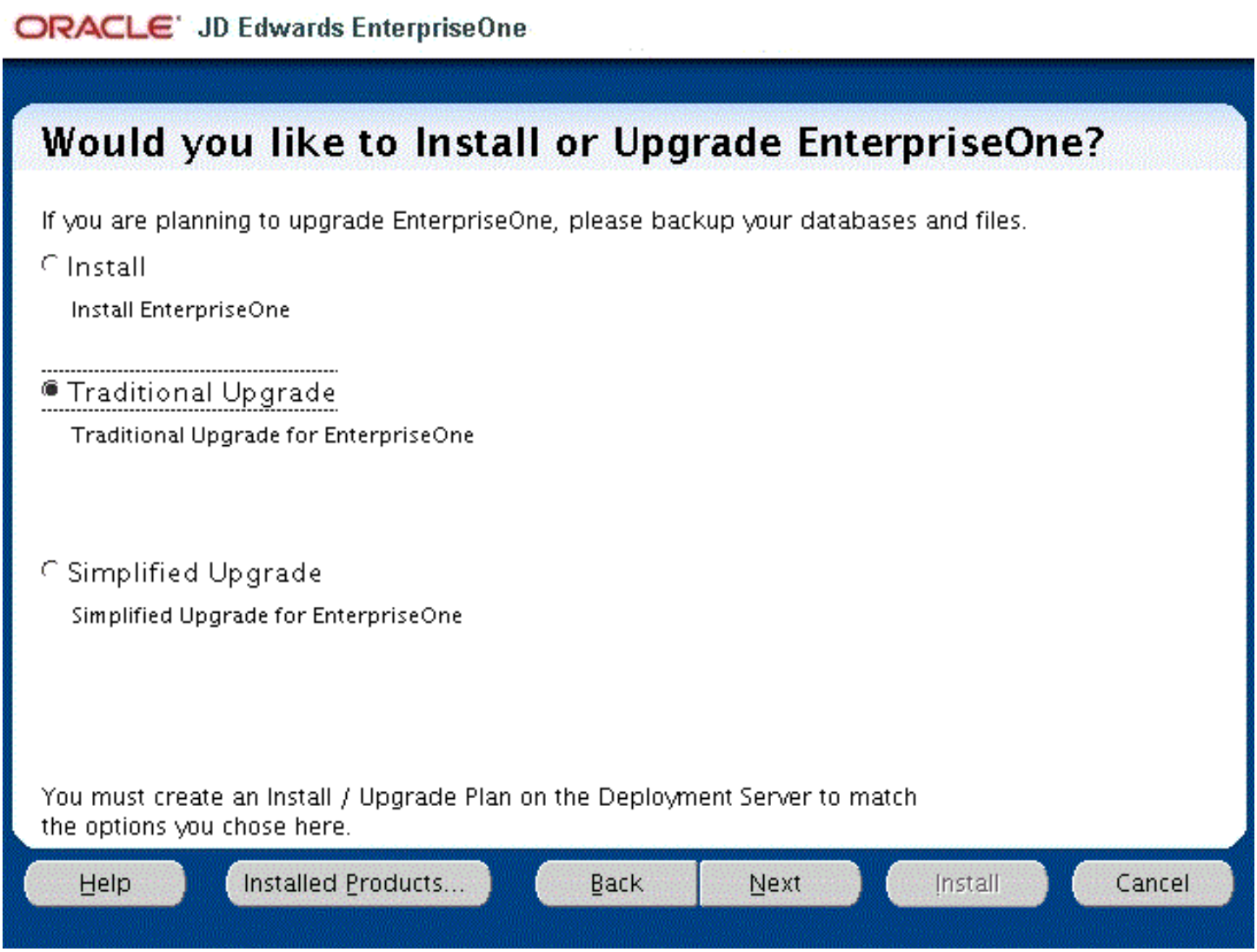
   - *Path*

     Enter the drive and directory where you want the installer files installed on your Deployment Server (from where you are running the Platform Pack installer). For example:

     ```
     Z:\JDEdwardsPPack\E920
     ```

     This process will store files directly related to the OUI installer (for example, the OUI inventory) in this location. This does not affect where libraries and paths are created on the IBMi.

10. Click the Next button.



11. On Would you like to Install or Upgrade EnterpriseOne?, choose whether you want to install or upgrade *JD Edwards EnterpriseOne* . The list below describes each run mode.

    - *Install*

      This selection installs Central Objects and Business Data / Control Tables for the selected environments.

      Note that the installer checks for the existence of the Business Data and Control Tables libraries and will not proceed if any of these libraries already exist:

      - *DV920*
      - *PD920*
      - *PY920*
      - *TESTDTA*
      - *PRODDTA*
      - *CRPDTA*
      - TESTCTL
      - PRODCTL
      - CRPCTL

    - *Traditional Upgrade*

      In this mode, the *JD Edwards EnterpriseOne* Platform Pack Installer checks for the existence of the Business Data and Control Tables libraries which are prerequisites to an upgrade of *JD Edwards EnterpriseOne* . F

      > **CAUTION:** You should always back up all databases that you want to preserve.

    - *Simplified Upgrade*

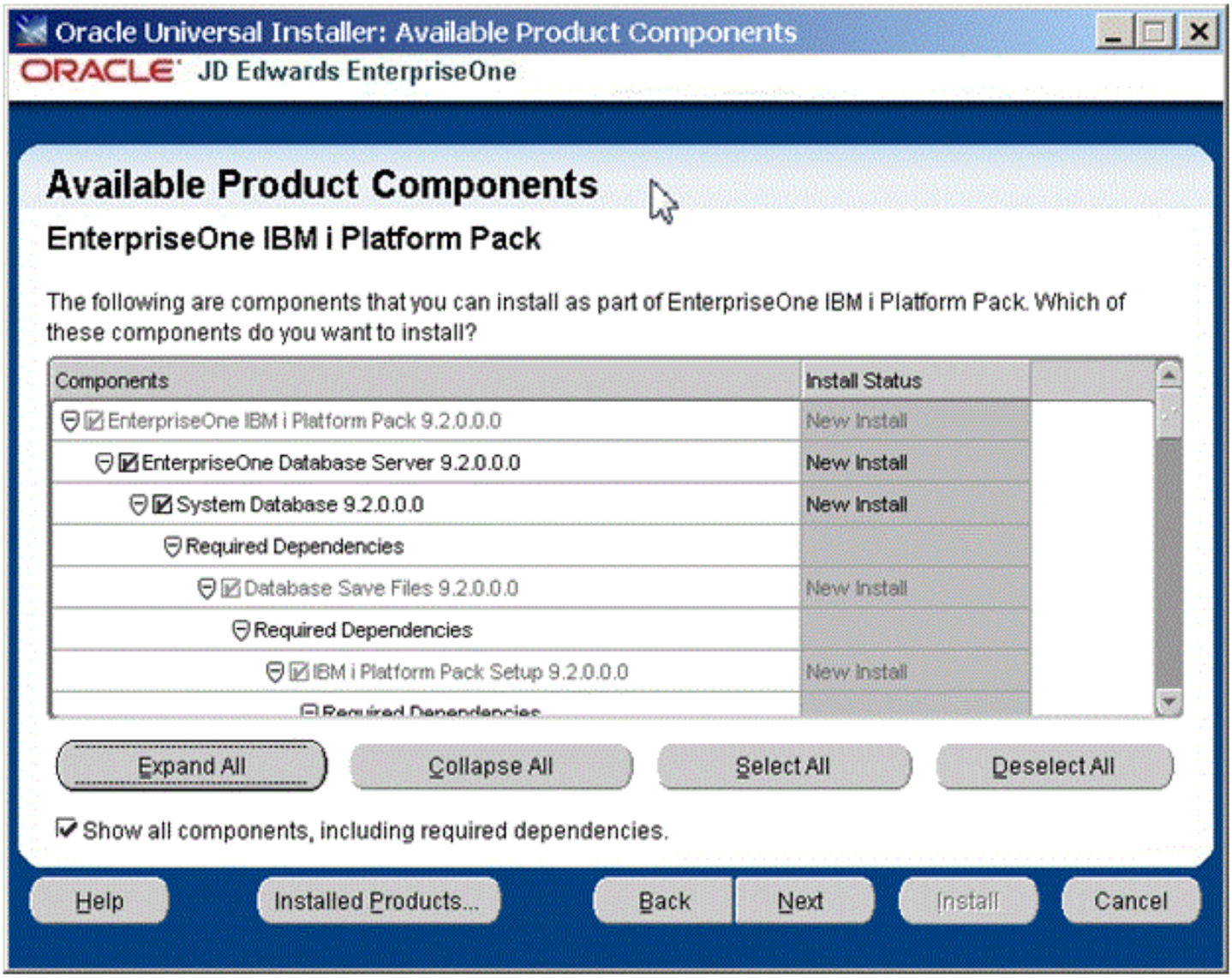
      In this mode, the *JD Edwards EnterpriseOne* Platform Pack Installer checks for the existence of the Business Data and Control Tables libraries which are prerequisites to an upgrade of *JD Edwards EnterpriseOne* . The Simplified Upgrade only replaces identifies and replaces only specific standard JD Edwards EnterpriseOne objects that have changed between from Applications Release 9.0 Update 2 or Release 9.1 to Applications Release 9.2.

      > **CAUTION:** You should always back up all databases that you want to preserve.

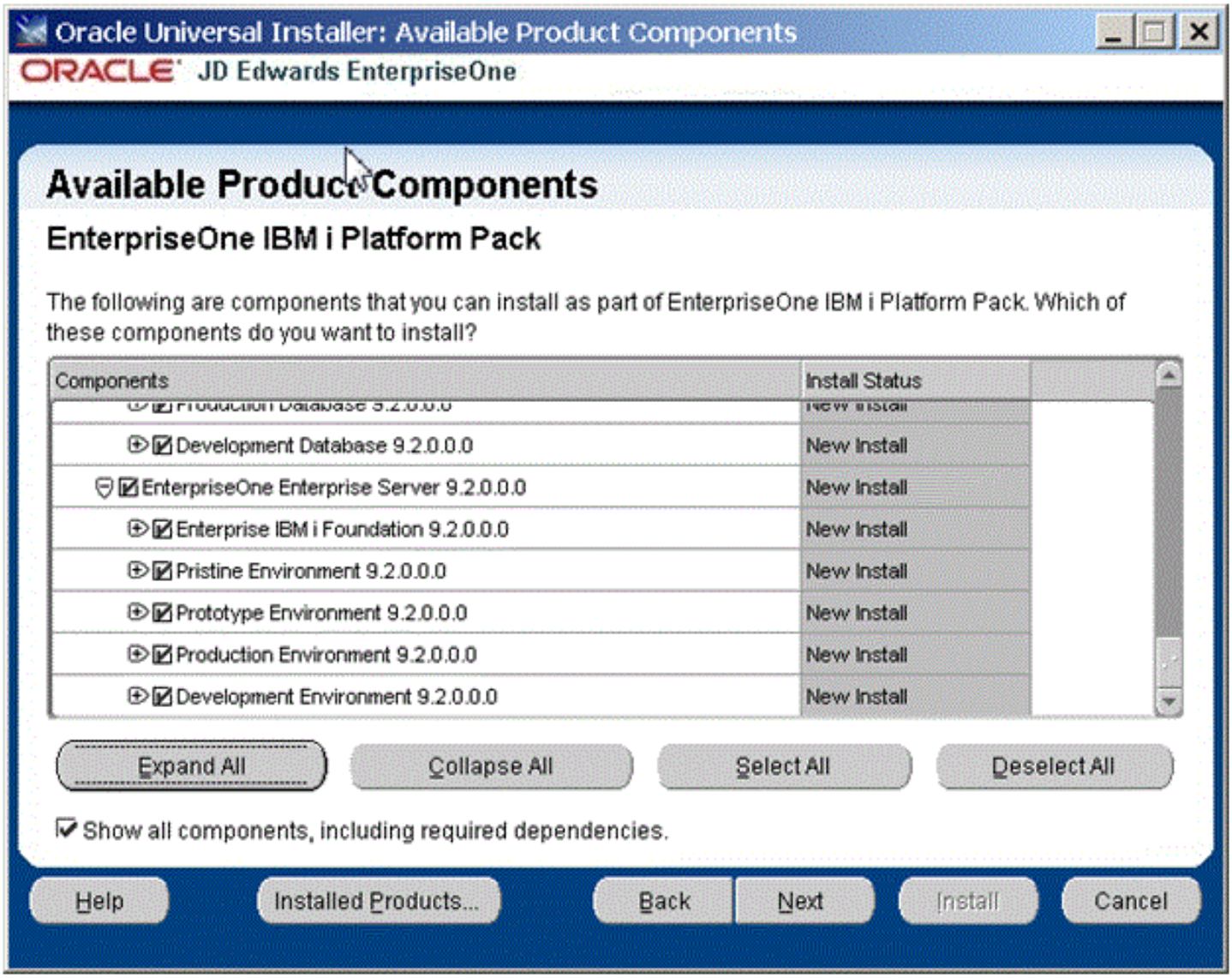
12. Click the **Next** button.

    If you chose the **Full** installation type, the Available Products screen will **not** display; you can skip to the Step *15*.

    If you chose the **Custom** installation type, the Oracle Universal Installer displays a list of available JD Edwards EnterpriseOne product components, as shown in the example below:



> **Tip:** Use the scroll bar to on the right hand side of the screen to view the complete list of available components. This is shown in the following screen sample.



On Available Product Components, select from these choices:

JD Edwards EnterpriseOne Database Server

- System Database

> **Note:** This selection includes mandatory system files. If you do not select this box, the JD Edwards EnterpriseOne Platform Pack Installer will select this component. Likewise, if you rerun the JD Edwards EnterpriseOne Platform Pack Installer to add an environment it will check to ensure that this component is already installed. Also if rerunning, you will not be given an option to install the environment in a different ORACLE_HOME.

- Production Databases
- Prototype Databases
- Development Databases
- Pristine Databases

JD Edwards EnterpriseOne Enterprise Server

- *JD Edwards EnterpriseOne* Foundation

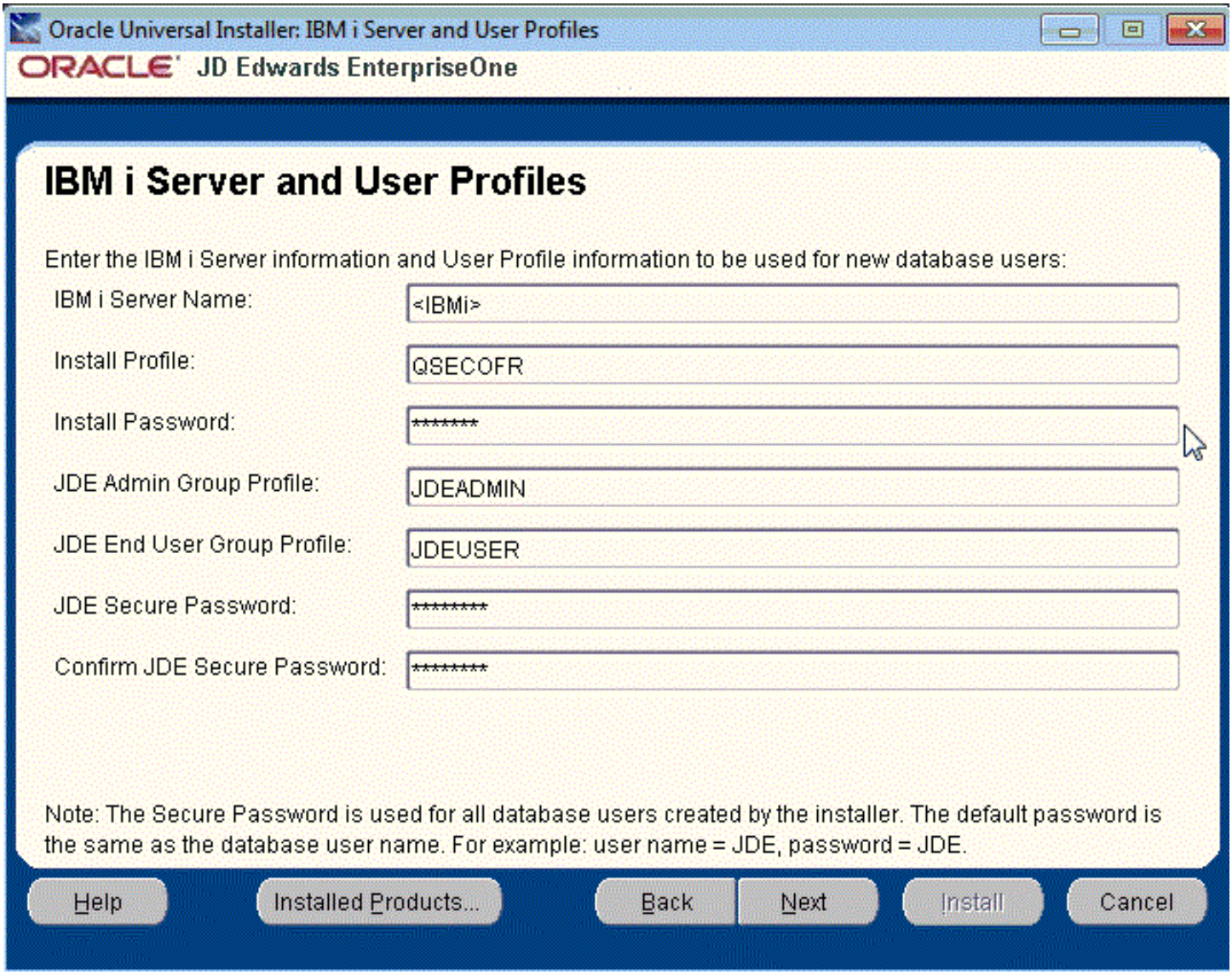
> **Note:** This selection includes system files. You must choose this feature for all initial installations of the Enterprise Server. If you do not select this feature, the *JD Edwards EnterpriseOne* Platform Pack Installer automatically selects it for installation.

- ES Production
- ES Prototype
- ES Development
- ES Pristine

> **Note:** For Upgrades, you should always select the Pristine environment. Otherwise, Table Conversions may not process correctly.

13. After you have verified your selection of components, click the **Next** button.

14. Click the **Next** button.



15. On *IBM i* Server and User Profiles, complete these fields:

    - *IBM i Server Name*

      Enter the name of the *IBM i* machine.
    - *Install Profile*

      Enter QSECOFR or another user on the host that has *ALLOBJ *SECADM *SAVSYS *IOSYSCFG *JOBCTL rights.
    - *Install Password*

      Enter the password for the Install Profile you specified in the preceding field.
    - *JDE Admin Group Profile*

      Enter the name of the admin group default. For example, JDEADMIN.
    - *JDE End User Group Profile*

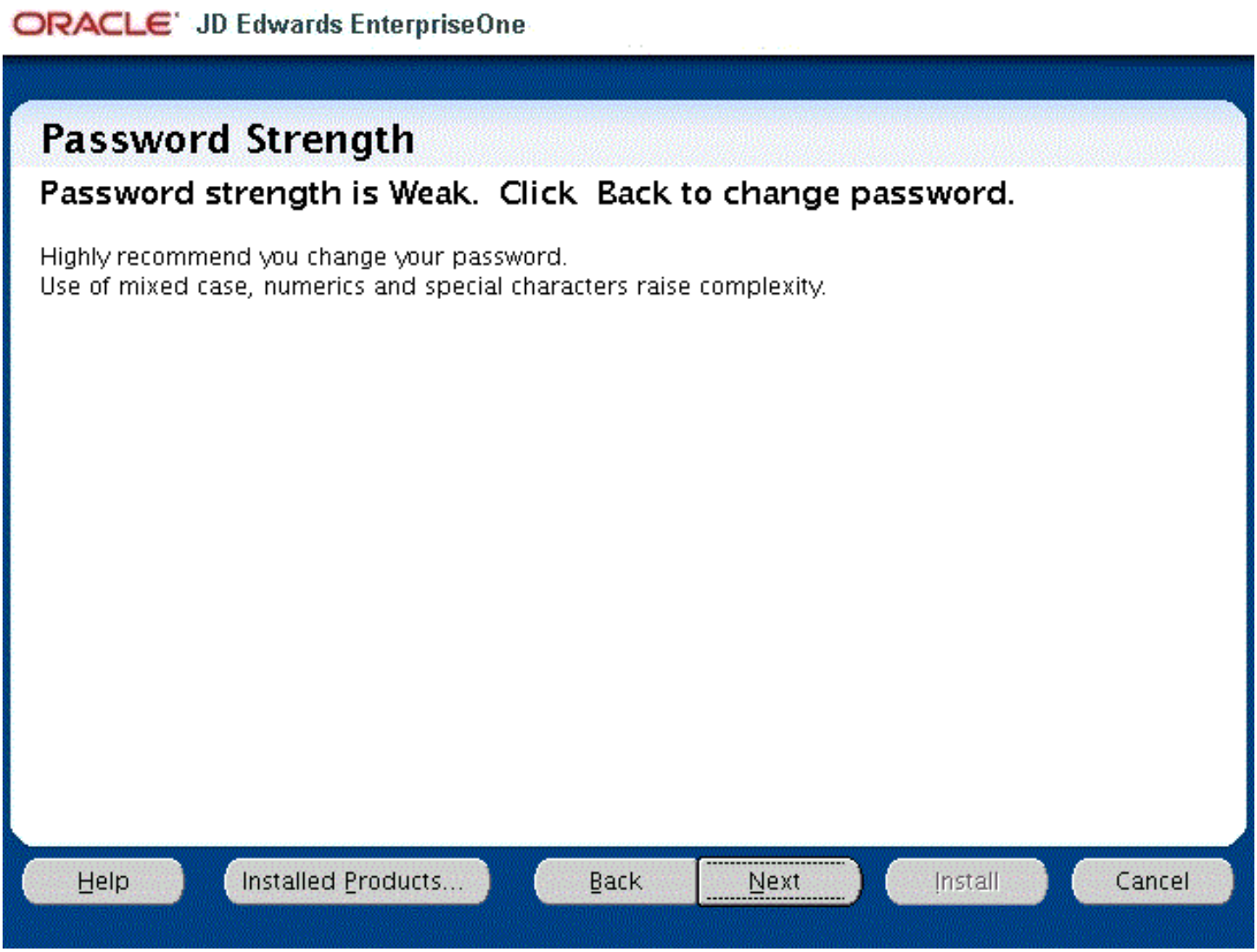
      Enter the name of the end user group profile. For example, JDEUSER.
    - *JDE Secure Password*

      This password allows you to change the password for users created on the *IBM i* . The default creates user profiles with password = user (for example, JDE JDE). If this violates the password rules on your *IBM i* machine, supply a secure password that will pass your password rules, then change the INI files and change the JD Edwards EnterpriseOne security definitions using JD Edwards EnterpriseOne applications P980001 and P98OWSEC before starting services.

      Leaving this as the default password, will allow the JD Edwards EnterpriseOne services to be started immediately after the installation.
    - *Confirm JDE Secure Password*

      Leave this as the default unless the Secure Password has been entered.

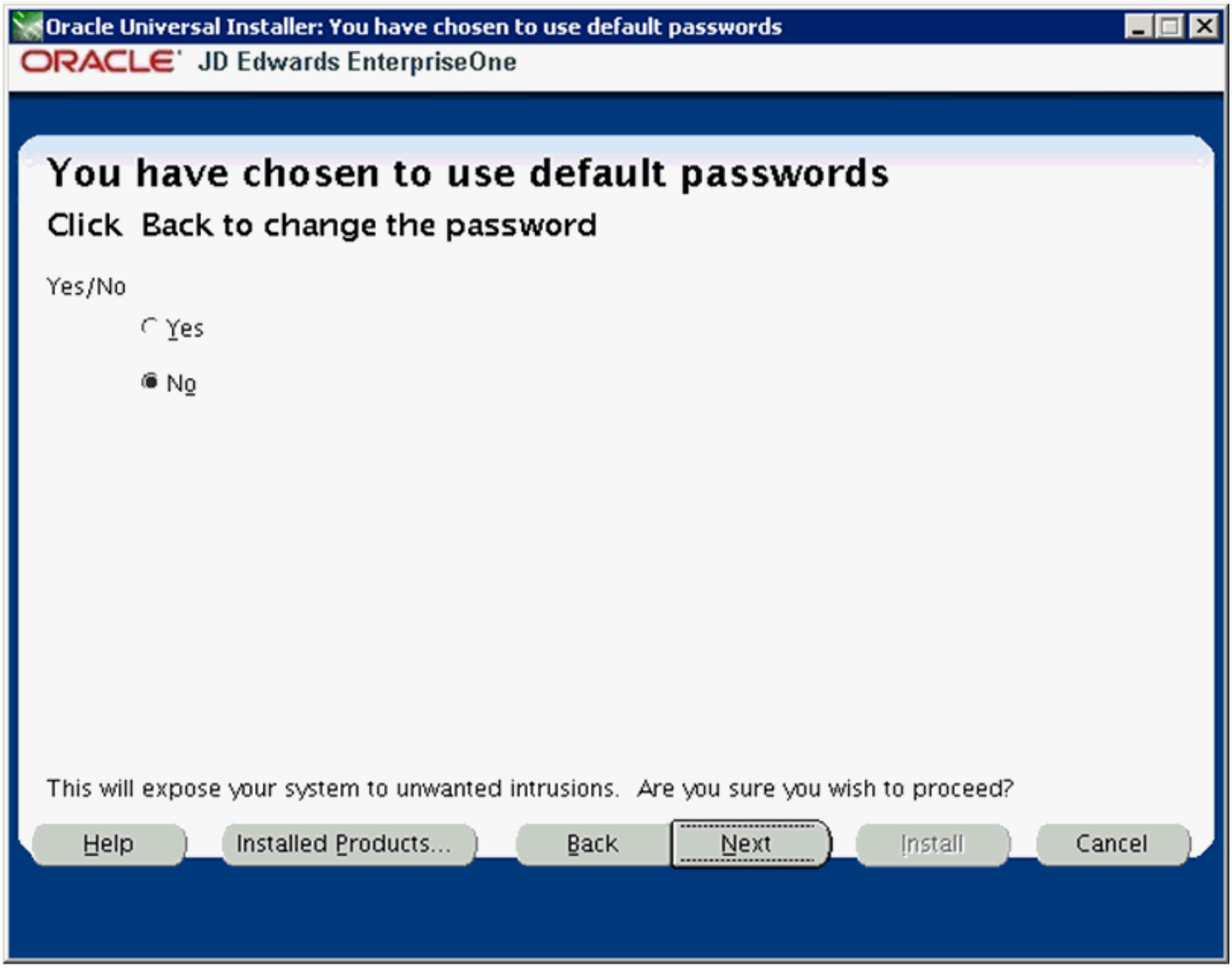
16. Click the **Next** button.



17. The installer displays the Password Strength panel if you have either chosen a weak password, or accepted the default password.

> **Note:** The installer program does not force you to change your password for a Weak value.

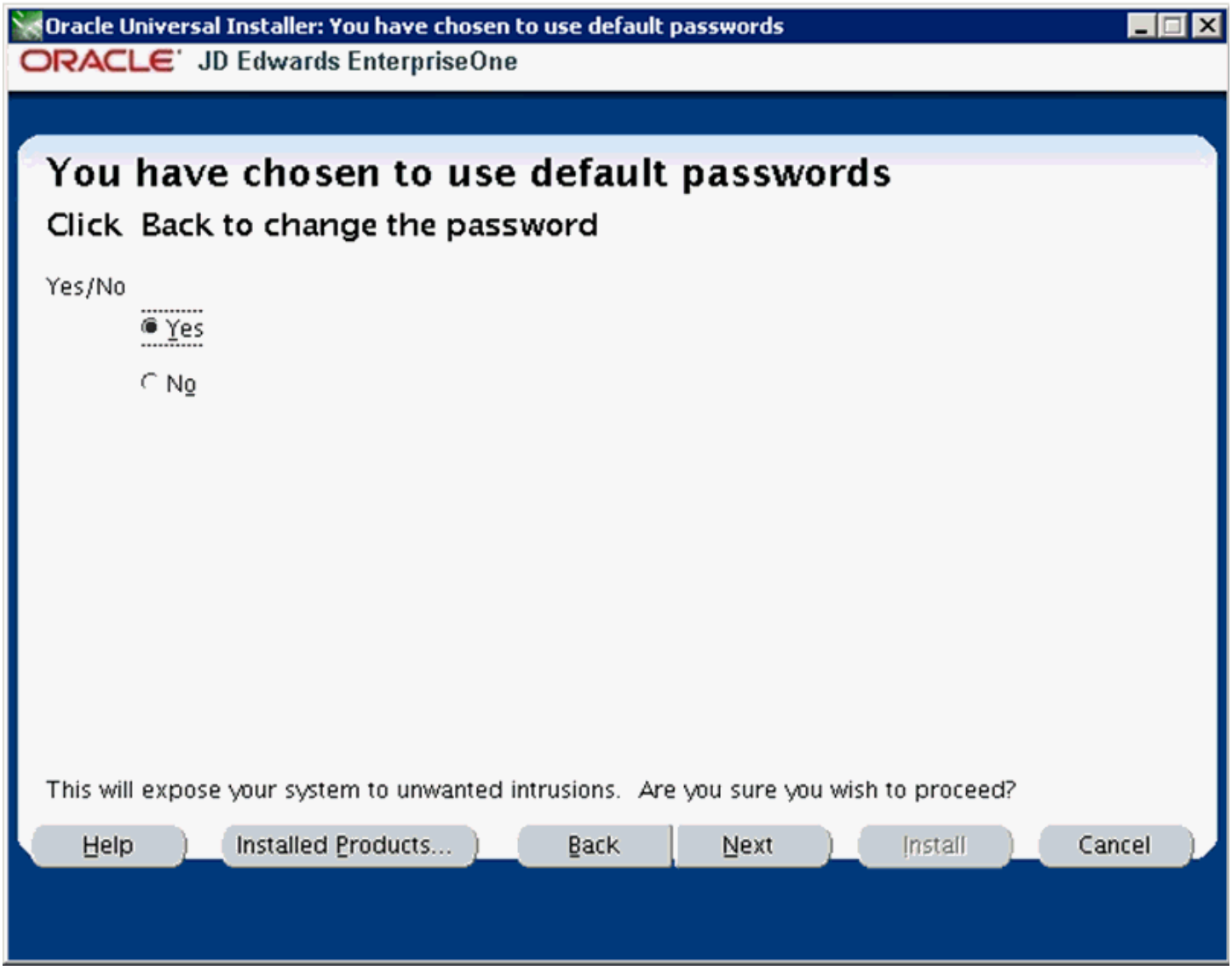
18. Click the **Next** button.


Oracle Universal Installer: You have chosen to use default passwords
ORACLE JD Edwards EnterpriseOne
You have chosen to use default passwords
Click Back to change the password
Yes/No
Yes
No
This will expose your system to unwanted intrusions. Are you sure you wish to proceed?
Help
Installed Products...
Back
Next
Install
Cancel

19. If you chose to use the default passwords, the installer presents the above screen as a security precaution. It is important to note the security implication when you agree to proceed with the installation using the default password values that are required and specified in the preceding screen. These values are only required

to complete the installation after which it is **strongly recommended** that you immediately change these passwords after installation.

To ensure you understand and agree to these terms, the installer defaults to a **No** value. In order to proceed and successfully complete the installation, you must explicitly change the value from **No** to **Yes**, as shown below:

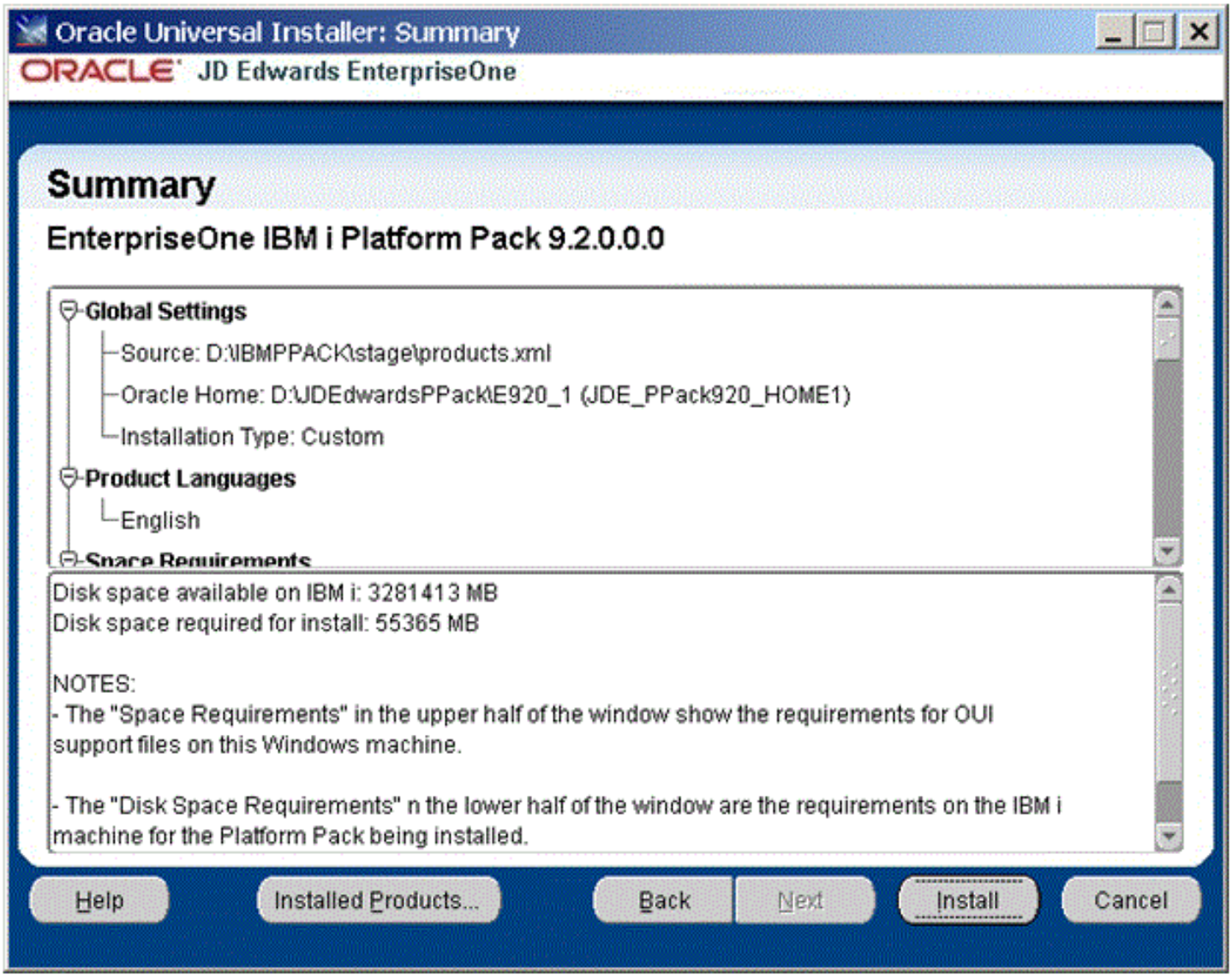

Oracle Universal Installer: You have chosen to use default passwords
ORACLE JD Edwards EnterpriseOne
You have chosen to use default passwords
Click Back to change the password
Yes/No
Yes
No
This will expose your system to unwanted intrusions. Are you sure you wish to proceed?
Help
Installed Products...
Back
Next
Install
Cancel

CAUTION: As noted on this screen, by choosing **Yes** you are acknowledging that by accepting the default passwords (which is required to completed the install) you are exposing your system to potential security concerns. As previously noted, after installation you should immediately change the passwords on your installed system.

20. Click the **Next** button.

    If the installer begins with no errors, you can proceed to the Step *21*. Otherwise, refer to the next section of this guide entitled: *Troubleshooting the Platform Pack Installation*.

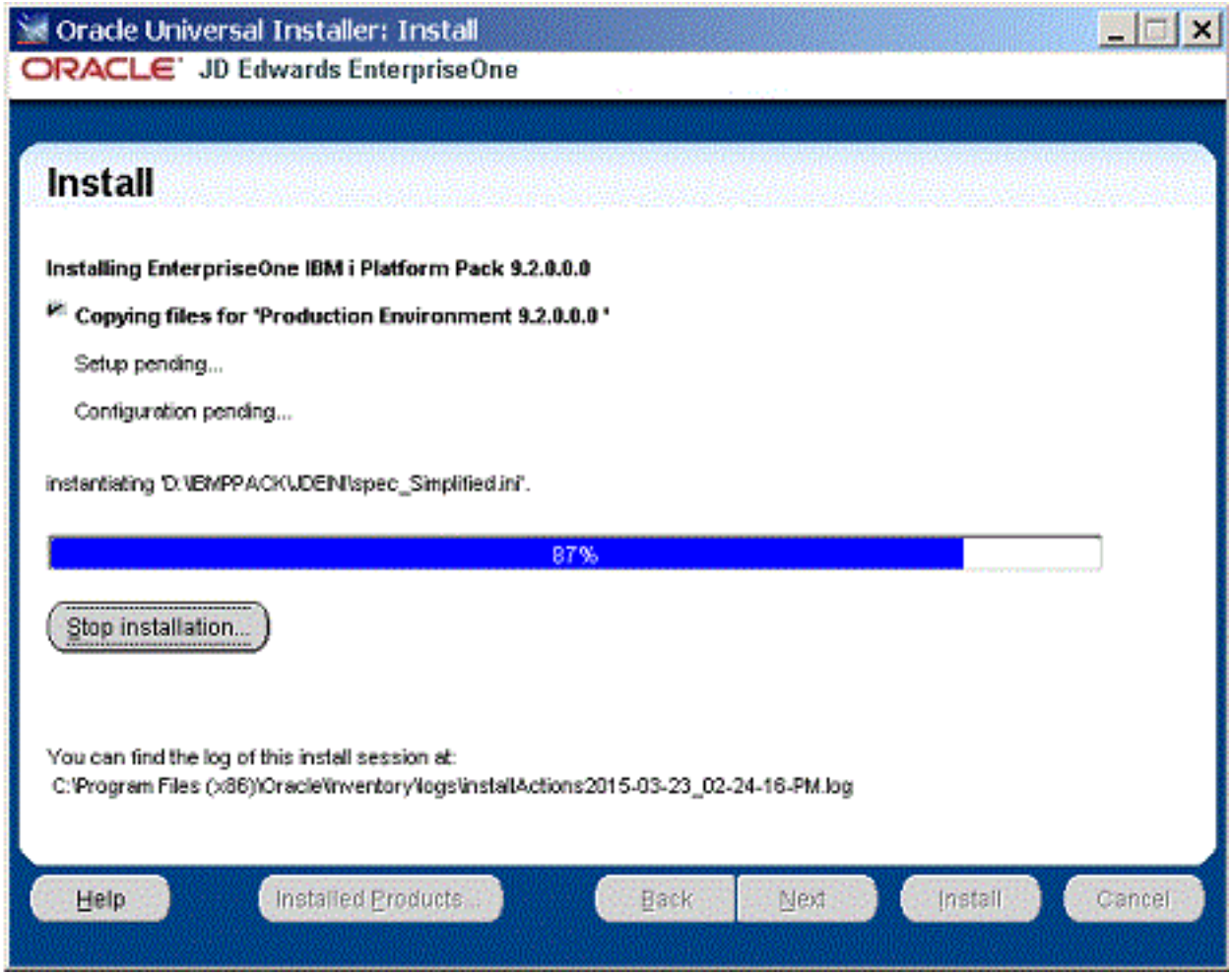
    If all specified conditions are valid, the installer displays the Summary screen.



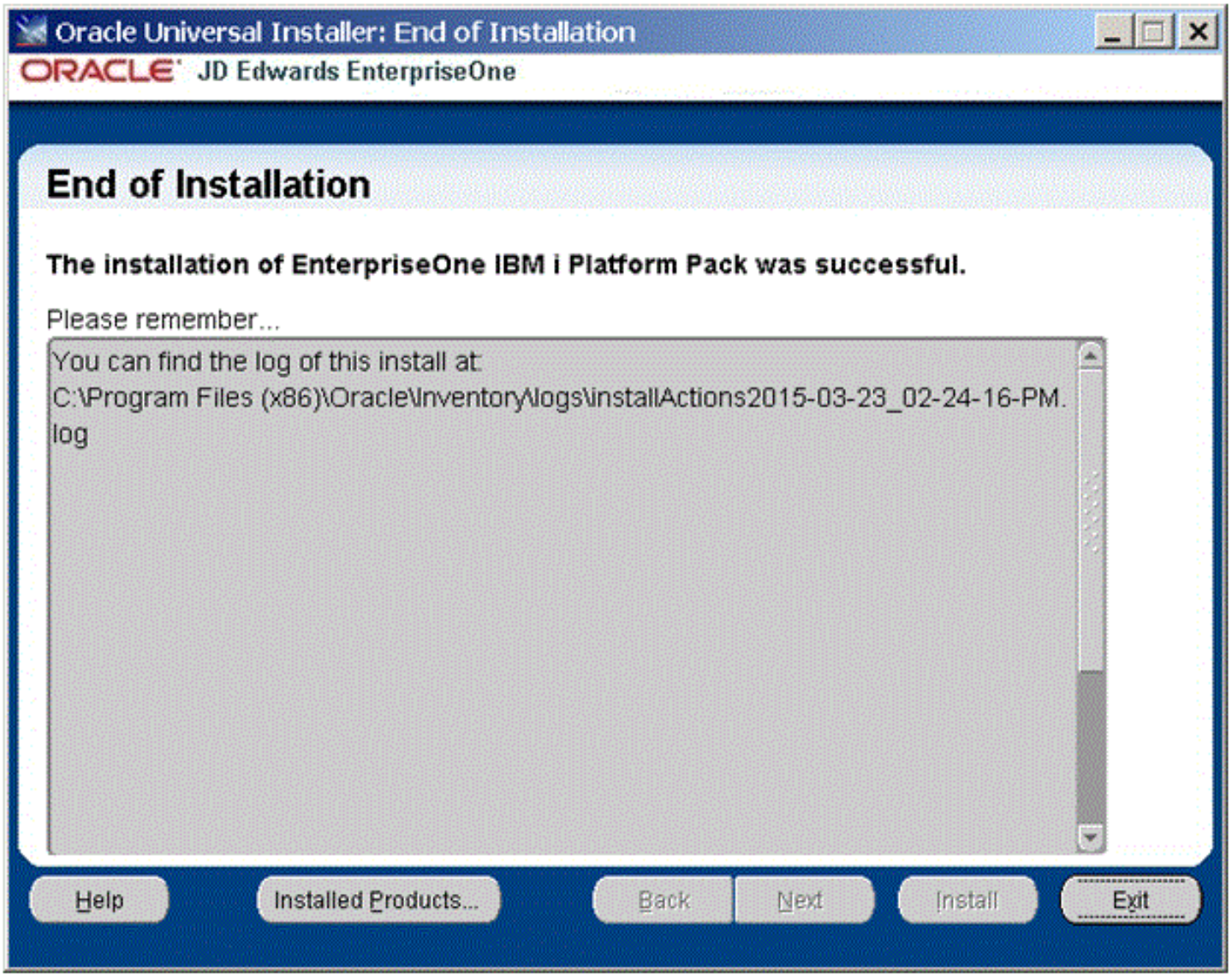
21. On Summary, in the top half of the screen review your selections and in the bottom half of the screen review the **NOTES**, which detail the disk space requirements for OUI support files and also for the Platform Pack being installed on the *IBM i* machine.

22. Click the **Install** button.

    As the installer runs it displays the Install progress, as shown in the following example.



After the installation is complete, the following End of Installation screen is displayed.

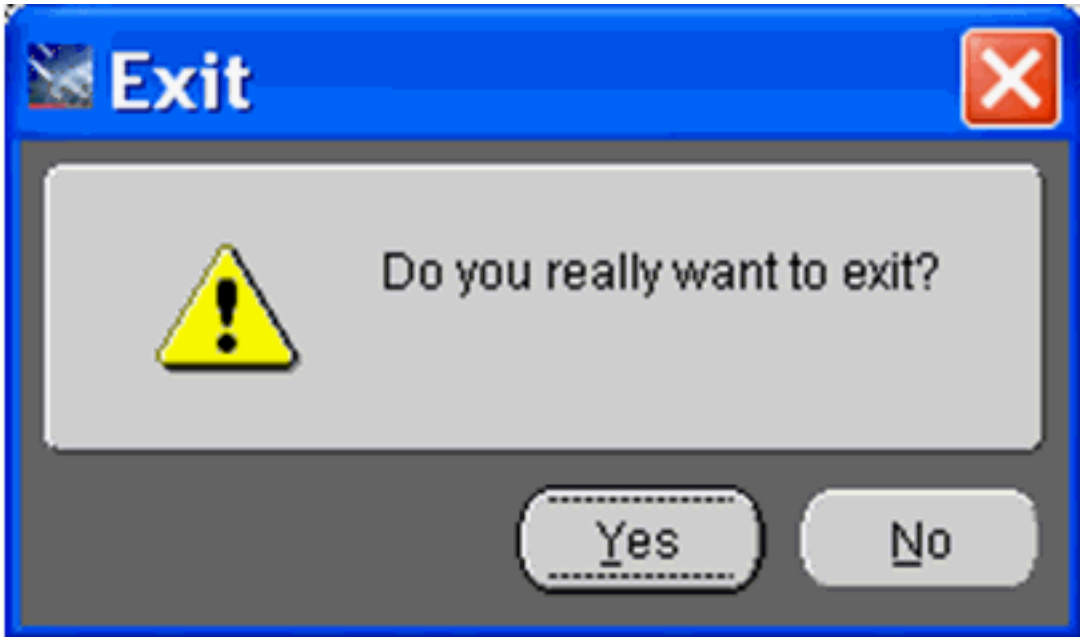


23. On End of Installation, verify the installation of the EnterpriseOne Platform Pack was successful.

    Review the **Please remember ...** portion for the installer log file location. The log file name is specified with the date and stamp when the installer ran. For example:

    ```
    c:\Program Files (x86)\Oracle\Inventory\logs\installActions2011-09-14_03-40-11-PM.log
    ```

24. Click the **Exit** button to exit OUI.



25. On Exit, click the **Yes** button.

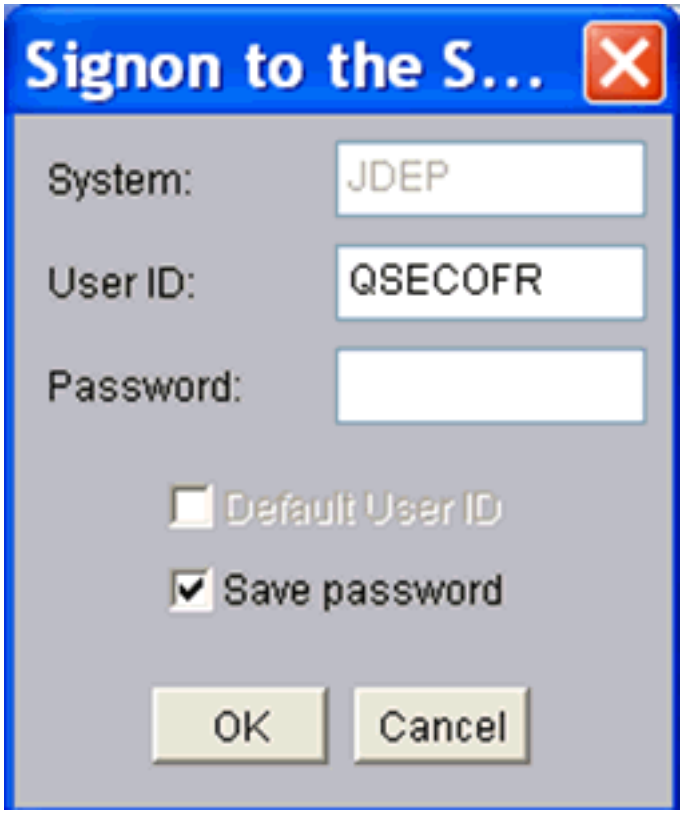
Troubleshooting the IBM i Platform Pack Installation

This section discusses these potential error or warning conditions and their probable causes and resolutions when running the *JD Edwards EnterpriseOne* Platform Pack Installer:

- *Invalid User or Password*
- *Abnormal Program Termination - jt400.jar and/or utill.jar Missing*
- *Business Data or Control Tables Already Exist*

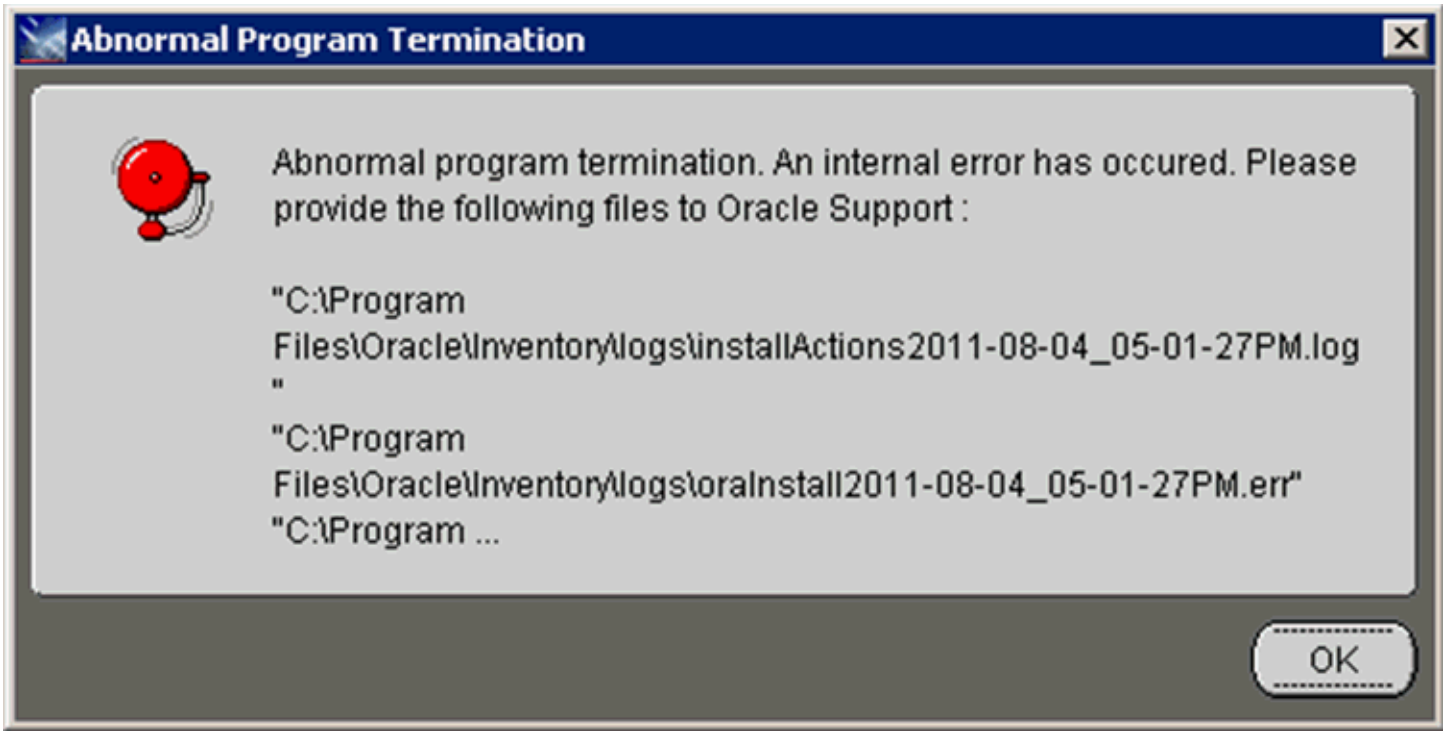
Invalid User or Password

If you enter an invalid user or password, you will see the following screen pop up multiple times. At this point you should start the Windows Task Manager, find the OUI process (`javaw.exe`) and end it. Then start the installer again.



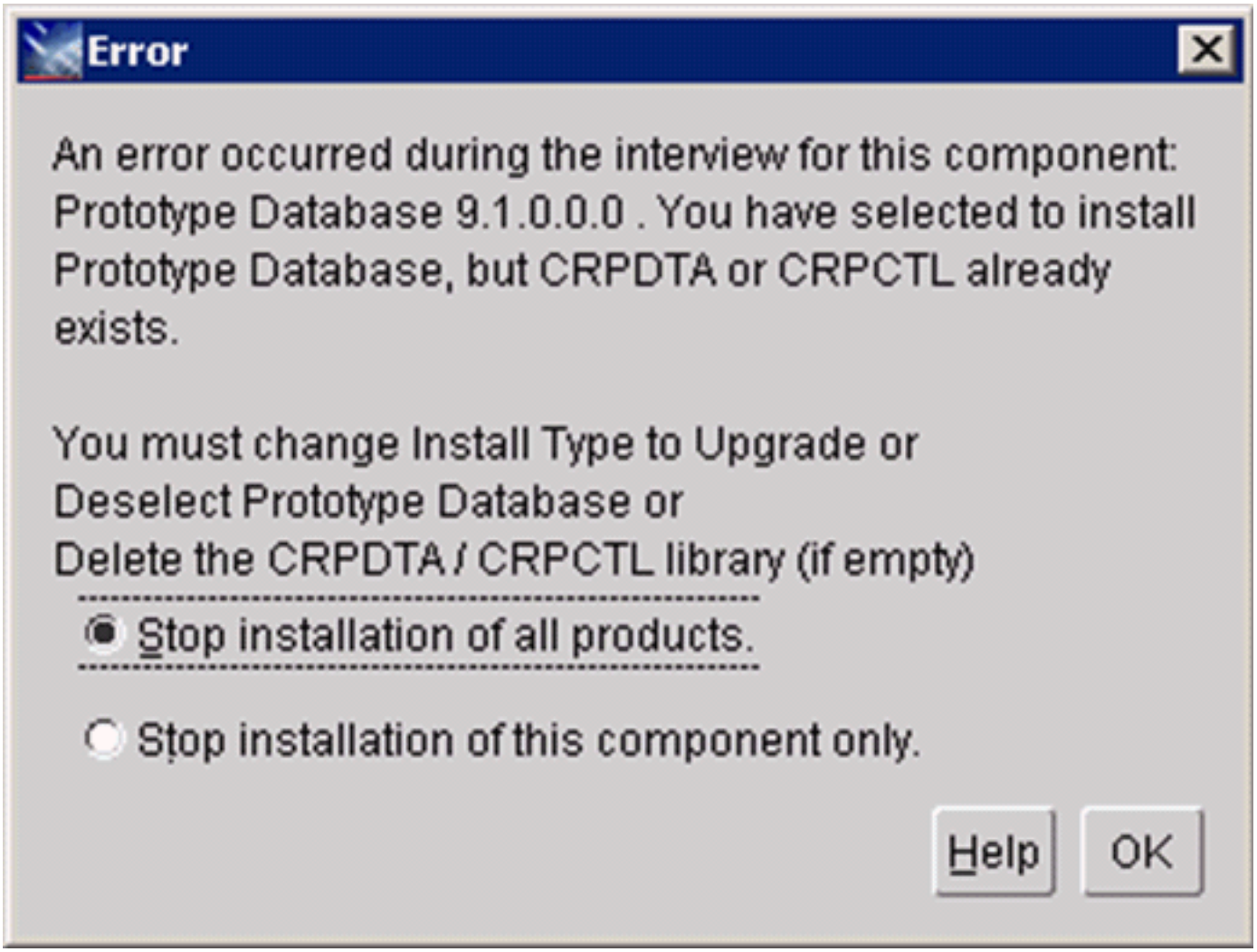
Abnormal Program Termination - jt400.jar and/or utill.jar Missing

If you receive the following message, it indicates that you have failed to correctly copy the `jt400.jar` and `util400.jar` into the `..\stage\ext\jlib` directory. To remedy, you must copy these files to the appropriate directory, exit from the installer, and restart the installer.



Business Data or Control Tables Already Exist

If you select Install Mode and the Business Data or Control Tables already exist, the installer displays the following error:



To remedy the above error, your choices are: must: or Deselect the Prototype Database or

- Change the Install Type to Upgrade
- Deselect the Prototype Database
- Delete the CRPDTA and CRPCTL library (if they are empty)

Rerunning the Platform Pack Installer

You must rerun the *JD Edwards EnterpriseOne* Platform Pack Installer to support these scenarios:

- You want to install the Enterprise Server and the Database Server on physically different machines.
- You want to add an Enterprise Server environment to the Enterprise Server.
- You want to add a Database Server database to the Database Server.
- You want to reinstall the *JD Edwards EnterpriseOne* Foundation on the Enterprise Server.
- You want to reinstall the System Database on the Database Server.

You should never reinstall any optional components without first deinstalling the components. If you select to deinstall the mandatory components you must also select to deinstall or have already deinstalled all related optional components. This table lists the mandatory and related optional components:

Server	Mandatory Component	Optional Components
Enterprise Server	*JD Edwards EnterpriseOne* Foundation	ES Production ES Prototype ES Development ES Pristine
Database Server	System Database	Production Databases Prototype Databases Development Databases Pristine Databases

Enterprise Server

If you are rerunning the *JD Edwards EnterpriseOne* Platform Pack Installer in order to add environments, you must specify the same IBM i instance as that which you selected for *JD Edwards EnterpriseOne* Foundation during the initial installation of the Platform Pack.

Note: If you are installing any JD Edwards EnterpriseOne component on multiple IBM i machines (for example, if you are installing multiple logic servers), you must run the Platform Pack installer from a different Microsoft Windows machine for each separate machine you install. Otherwise, the installer detects that some components (for example Foundation for a logic server) have already been installed, and by design ignores subsequent requests to install the same component, regardless of whether the installation is intended for a different target machine.

Database Server

If you are rerunning the *JD Edwards EnterpriseOne* Platform Pack Installer in order to add databases, you must specify the same IBM i instance as that which you selected for System Database during the initial installation of the Platform Pack.

Installing the Latest Tools Release and Latest Tools Release to the Enterprise Server

CAUTION: The Tools Release level must match what was installed on the Deployment Server.

Use Server Manager to install the latest tools release and latest tools release.

Working with Database Security

The libraries and tables delivered by the Platform Pack installation are not secured. In order to provide sufficient security, you should run the tool SETOWAUT which allows you to 'lock down' libraries and IFS directories delivered by the Platform Pack installation. You can obtain the latest version of the SETOWAUT tool from the Update Center using the Change Assistant.

In order to maximize your database security, you should change the passwords on all table owners created during the Platform Pack installation; these are created with the user and password equal to the same value. Such a user and password relationship could expose you to worms and viruses aimed at gaining access to your database. Consult with your DBA for advice on changing passwords to meet the security requirements of your database installation.

The Installation Workbench assumes that the database user is JDE and that the password is the same, unless it finds this override in the **jde.ini** file on the Deployment Server. Once the database passwords have been changed, you will need to add this section to the **jde.ini** file:

```
[DSPWD]
JDE=new_password
```

For example, if you changed the password for JDE to **alaska5**, your section would look like this:

```
[DSPWD]
JDE=alaska5
```

CAUTION: The Installation Workbench can only process passwords equal to or less than 10 characters in length. Therefore, you cannot use passwords greater than 10 characters even if your RDMS allows it.

After you change the [DSPWD] section of the jde.ini file, logon to OneWorld in the JDEPLAN environment on the Deployment Server with the new password in the correct case.

CAUTION: Whenever you change the password on your database, as recommended for security purposes, you must also ensure that your security settings in the Enterprise Server **jde.ini** file match that of your database. For applicable instructions, refer to the chapter entitled: Chapter 10, "Performing Post Upgrade Tasks" in the section entitled: Chapter 10.1, "Working With Signon Security and Table Creation Security". You should secure the **jde.ini** file on the Deployment Server to prevent unauthorized access. You should delete the **[DSPWD]** section once the install or upgrade is complete.

Note: If you are upgrading from *JD Edwards EnterpriseOne* Releases 8.10 or 8.11, you should consider disabling the legacy user, which is PSFT.

5 Working with the Installation Planner for an Upgrade

Understanding the Planner Process for Upgrades

Installation Planner is an application that runs on the Deployment Server. It is a system administration tool that guides you through the process of configuring the machines on which you will run *Release 9.2* .

This chapter contains the tasks for defining a custom installation plan. The information you provide on the Installation Planner forms, such as database type and Enterprise Server type, determines the information you see on the remaining forms. The Installation Planner processing options also affect which choices you are given while setting up your plan. For a complete description of the processing options, refer to *Reviewing Installation Planner Processing Options*.

> **CAUTION:** To use Installation Planner remove machines from an existing installation plan, see *Deleting Machines from an Installation Plan*

This chapter contains the following topics:

- *Dropping SQL Packages*
- *Defining the SQL Package Creation Location*
- *Assumptions about Mandatory Pre-Upgrade Process*
- *Mandatory Pre-Upgrade Process - Upgrading the Pristine Environment*
- *Running Table Conversions Locally*
- *Deferring Index Builds*

Dropping SQL Packages

When upgrading with IBM i data sources, the SQL packages must be dropped before starting the planner. The IBM i caches the table layout in the SQL package and does not look at what the current table layout is. If the SQL packages are not dropped, errors may occur in tables with changed formats.

To drop SQL packages:

1. Ensure that *JD Edwards EnterpriseOne* is shut down (or make sure that you have not attached to the IBM i yet).
2. On the IBM i, for each Business Data and Control Tables library, enter the following:

   `WRKOBJ OBJ(xx\*ALL) OBJTYPE(*SQLPKG)` , where xx is your library

   or

   `WRKOBJ OBJ(*ALLUSR\*ALL) OBJTYPE(*SQLPKG)` and choose your business data and control table libraries from the list.
3. Type a `4` next to each of the packages, and press `Enter`.

Defining the SQL Package Creation Location

Verify the JDE.INI setting on the Enterprise Server that controls where SQL Packages are created. The applicable setting is:

```
[DB SYSTEM SETTINGS]
sqlPackageLibrary=value
```

where **value** must be set to 2 in order for Table Conversions to work correctly. Otherwise you will see Table Conversion failures. For an explanation of other values, refer to *UBE Performance ' SQL Package Location* in the chapter of this guide entitled: *Performing Post Installation and Upgrade Tasks*.

Assumptions about Mandatory Pre-Upgrade Process

This table outlines the assumptions about the mandatory pre-upgrade process.

Personnel	Installer
Logon Status	On the Deployment Server, logged on to *Release 9.2* as user JDE into either the JDEPLAN or *DEP920* environment (each step will tell you which environment to use.)
Prerequisites	Verify that the Deployment Server is installed and the latest Tools Release and Planner Update have been installed, in that order. Verify that the Pristine database is installed and the Pristine Central Objects loaded.
Concurrent Tasks	None.

Mandatory Pre-Upgrade Process - Upgrading the Pristine Environment

Due to the hundreds of table conversions, which will run during the upgrade process, it is recommend that you run table conversions on the Enterprise Server. The following process is necessary to run Table Conversions on the server.

CAUTION: The Pristine (*PS920*) environment must be installed prior to running Table Conversions. Each step must be completed and checked off in the exact order listed below.

- Create an Upgrade Plan for the Pristine (*PS920*) environment.
- Follow the steps in the *Starting Installation Planner* section and create a plan for Pristine only.

- Run the Upgrade Plan just created for the Pristine (*PS920*) environment.

  Note: Table Conversions will not run when upgrading the Pristine (*PS920*) environment. The following steps may be completed while the Installation Workbench is running the Pristine (*PS920*) upgrade plan.

- Install the latest Tools Release on the Enterprise Server (the Tools Release level must match what was installed on the Deployment Server).

  Note: This step may also be performed while the Installation Workbench is running.

- Ensure that *JD Edwards EnterpriseOne* services are up and running on the Enterprise Server.

  Note: Installation Workbench for the Pristine Environment must be completed before proceeding with following steps.

  Note: After running the Pristine Upgrade Workbench, sign out of EnterpriseOne and sign in again before starting the Upgrade for your next environment.

- Continue upgrading your desired environments.

Running Table Conversions Locally

The functionality to run the Table Conversions locally on the Deployment Server is still available, and works much as it did in previous releases. However it is recommended that you run Table Conversions on the Enterprise Server in order to minimize Upgrade time.

If you choose to run your Table Conversions locally instead of on the Enterprise Server, some steps in the Mandatory Pre-Upgrade Procedure must still be completed before running the Installation Workbench. These are:

- Installing latest Tools Release
- Loading latest Planner Update

These steps are described in the *Mandatory Pre-Upgrade Process - Upgrading the Pristine Environment*.

Deferring Index Builds

If you want to defer index builds during the JD Edwards EnterpriseOne upgrade process, refer to the chapter of this guide entitled: *Working with the Installation Planner for an Upgrade* in the section of that chapter entitled: *Deferring Index Builds During Table Conversion Workbench*.

Working with Software Requirements

The goal of the *JD Edwards EnterpriseOne Release 9.2* Installation is to include the most current tools releases and updates at the time the installation image is mastered. However, subsequent to that time it is possible that critical fixes may become necessary and available. You should check *Accessing Certifications* to verify if any such *JD Edwards EnterpriseOne Release 9.2* Installation fixes are required.

Reviewing Installation Planner Processing Options

Processing options control how Installation Planner responds as you set up plans and options you see as you work through the custom planner. If processing options are not set up correctly, you will not see the appropriate options as you work through the planner. You set up these processing options to control business function mapping.

You should review the default processing options for the Installation Planner application prerequisite to create the plan. First-time users can set up the processing options to step through the planner with informational messages. If you do not want to see these messages, you can turn them off.

Assumptions About Reviewing Installation Planner Processing Options

This table lists the assumptions about reviewing the processing options for the installation planner.

Personnel	Installer
Logon Status	On the Deployment Server, logged on as user JDE with the database password for user JDE, in the Planner environment.
Prerequisites	The Deployment Server must be installed.
Concurrent Tasks	The Platform Pack installer can be running.

Accessing Processing Options

To access processing options, you must first log on to *Release 9.2* and specify your installation plan type.

1. Log on to *Release 9.2* as user JDE with the database password for user JDE.
2. Access the planner environment (*JDEPLAN*).
3. From the System Installation Tools menu (GH961), right-click either Typical Installation Plan or Custom Installation Plan.
4. Choose Prompt for Values.

   The Processing Options form appears.

Choosing Processing Option Values

Once you have accessed processing options, perform the following tasks to choose the processing option values:

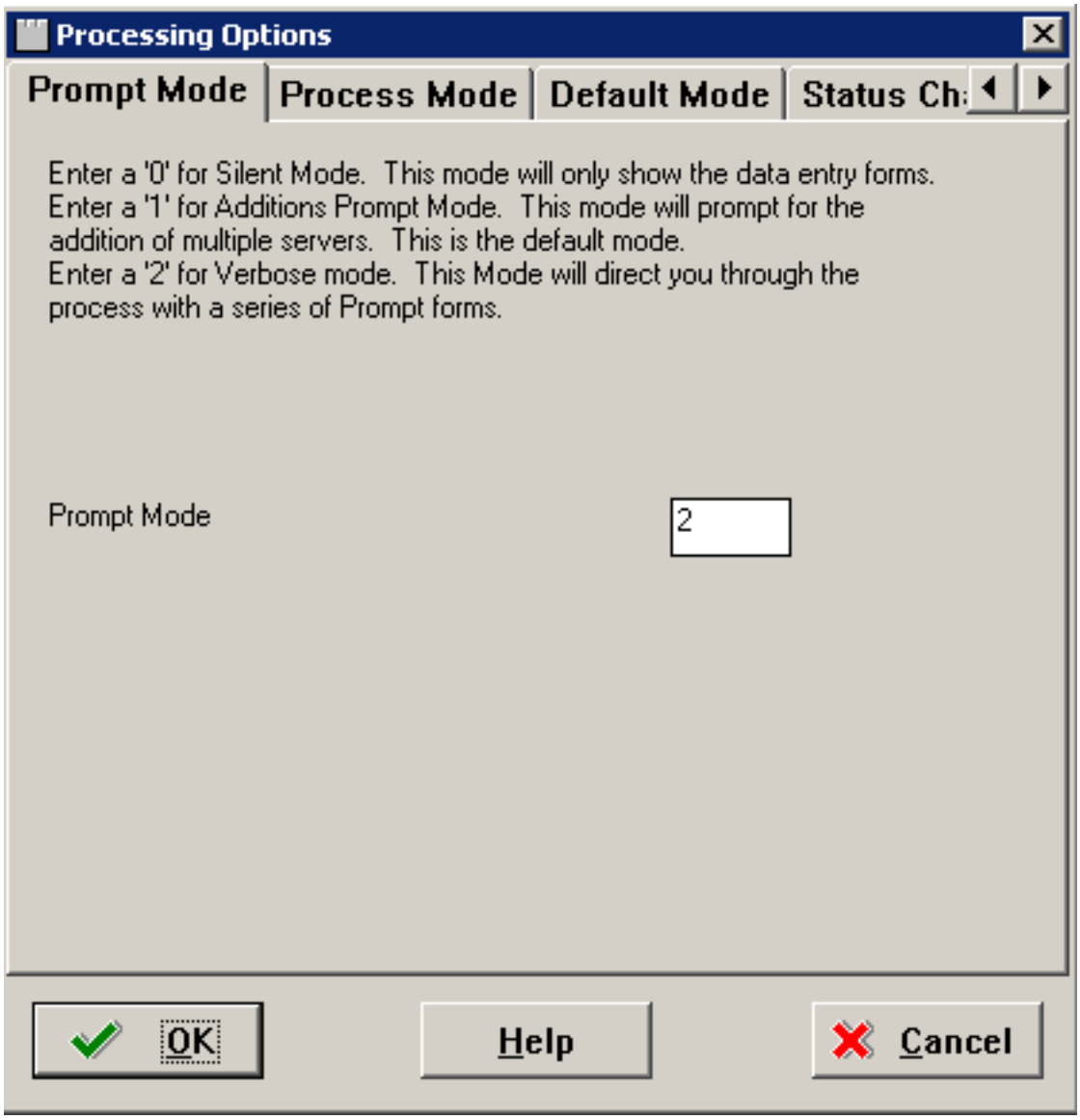
- *Specifying the Prompt Mode*
- *Specifying the Process Mode*

- *Specifying the Default Mode*
- *Verifying Status Change Values Have Not Changed*
- *Specifying Plan Completion Processes*
- *Replication Options (Obsolete)*

Specifying the Prompt Mode

To specify the prompt mode:

1. Select the Prompt Mode tab.



2. On the Prompt Mode tab, select a prompt mode:

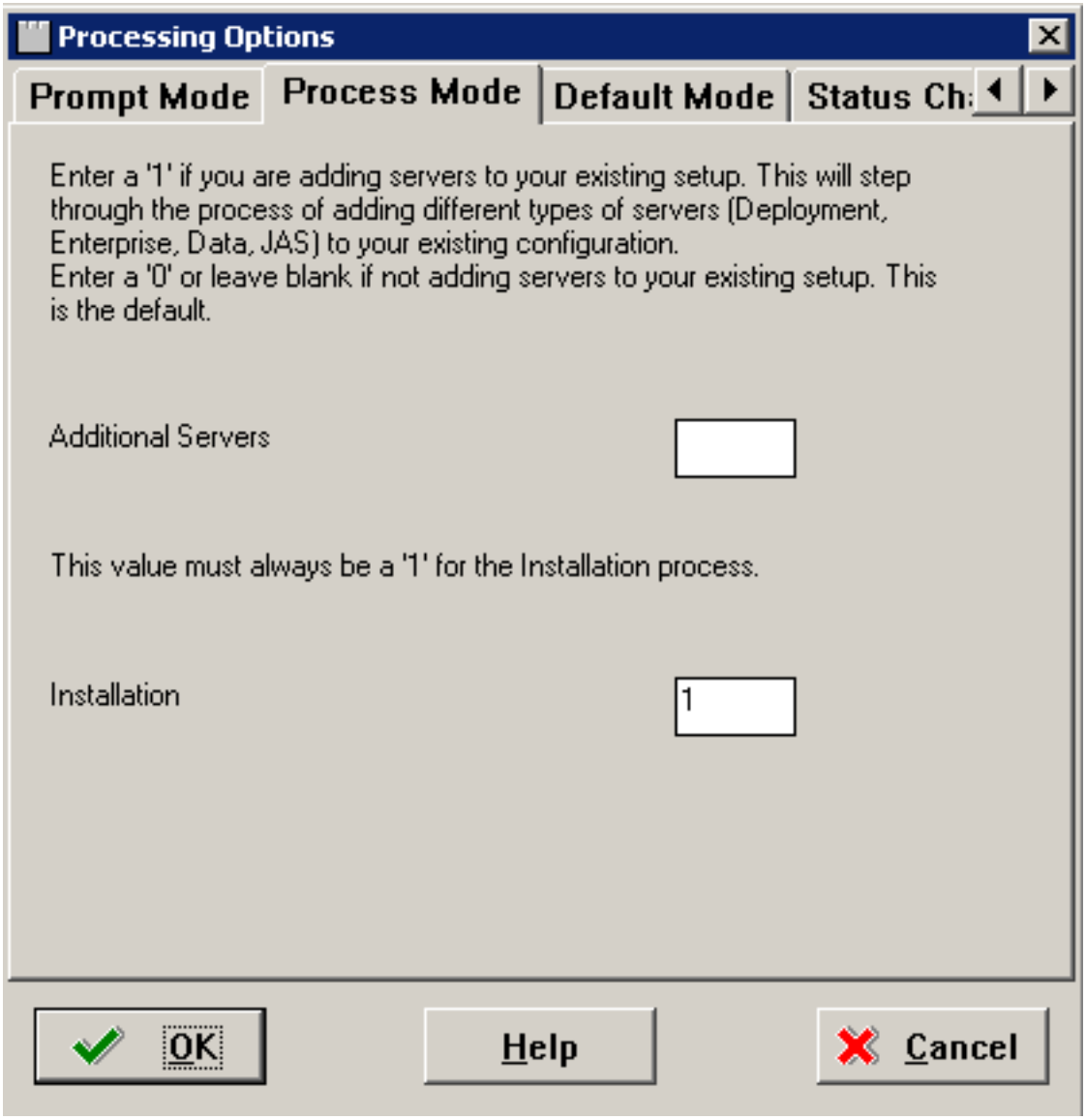
Value	Model	Description
0	Silent	Installation Planner displays only the data entry forms.

Value	Model	Description
1	Additions Prompt	Installation Planner prompts you to add servers.
2	Verbose	Installation Planner directs you through creating a plan with a series of prompting forms.

Specifying the Process Mode

To specify the process mode:

1. Select the Process Mode tab.



2. On the Process Mode tab, select the options for the processes that you want to run when you create your plan:
   - *Additional Servers*

     Enter 1 to add servers to your existing setup (Deployment Server, Enterprise Server, Database Server, *HTML Web Server*). Enter 0 or leave blank for regular plans.

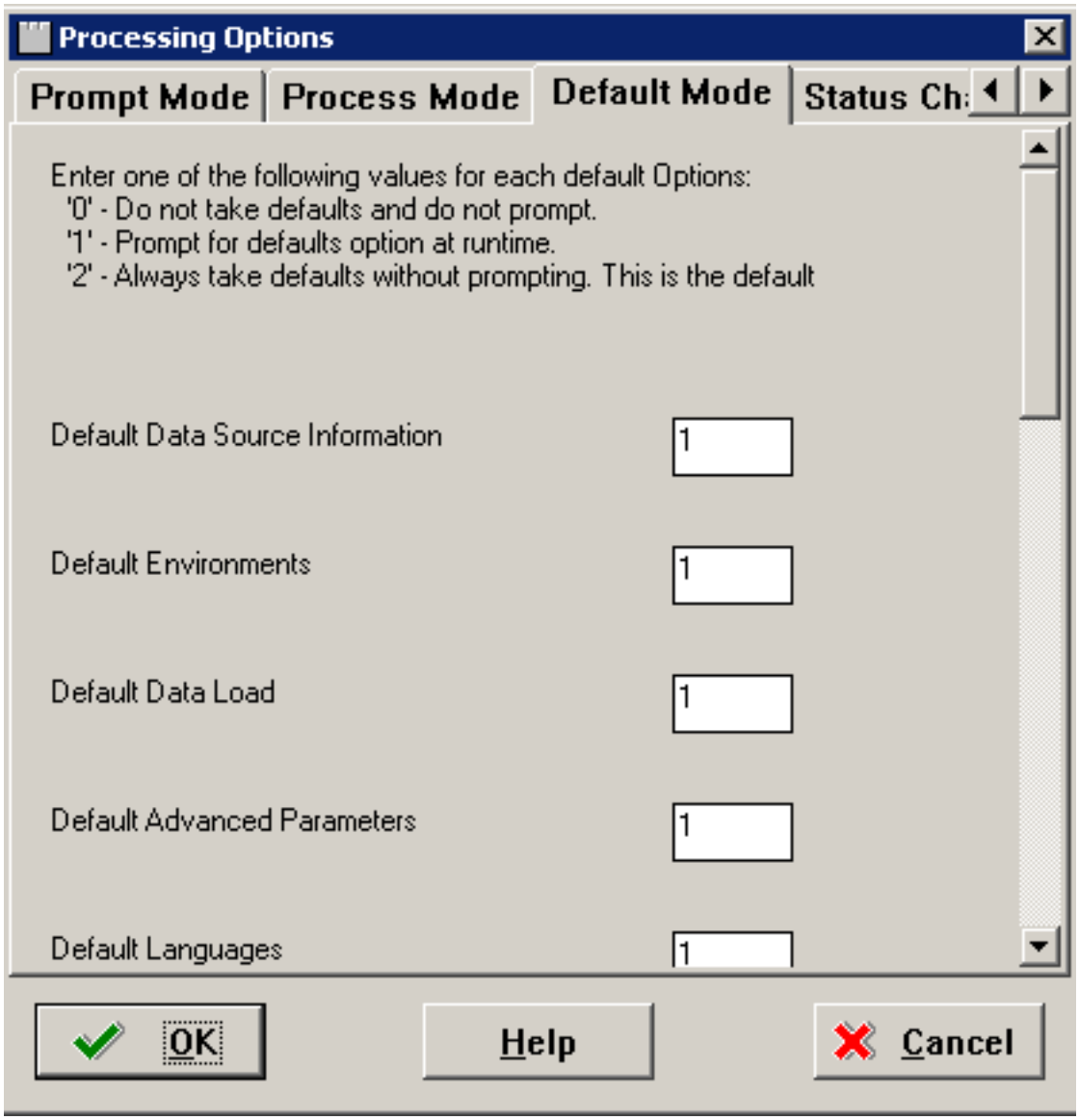
     Caution: You should only change this value when running a Server Plan.
   - *Installation*

     Enter 1 to run the *JD Edwards EnterpriseOne* installation automatically.

Specifying the Default Mode

To specify the default mode:

1. Select the Default Mode tab.



2. On the Default Mode tab, enter these values into the processing option fields:

Value	Description
0	Do not use default values and do not prompt.
1	Prompt for default options at run-time.
2	Default mode. Always use defaults without prompting.

   - *Default Data Source Information*

     Select whether you want the ability to modify data source information or just take the default values.
   - *Default Environments*

     Select whether you want the ability to select environments or take the default values.
   - *Default Data Load*

     Select whether you want the ability to modify data load parameters or take the default values.
   - *Default Advanced Parameters*

     Select whether you want the ability to modify advanced parameters or take the default values.
   - *Default Languages*

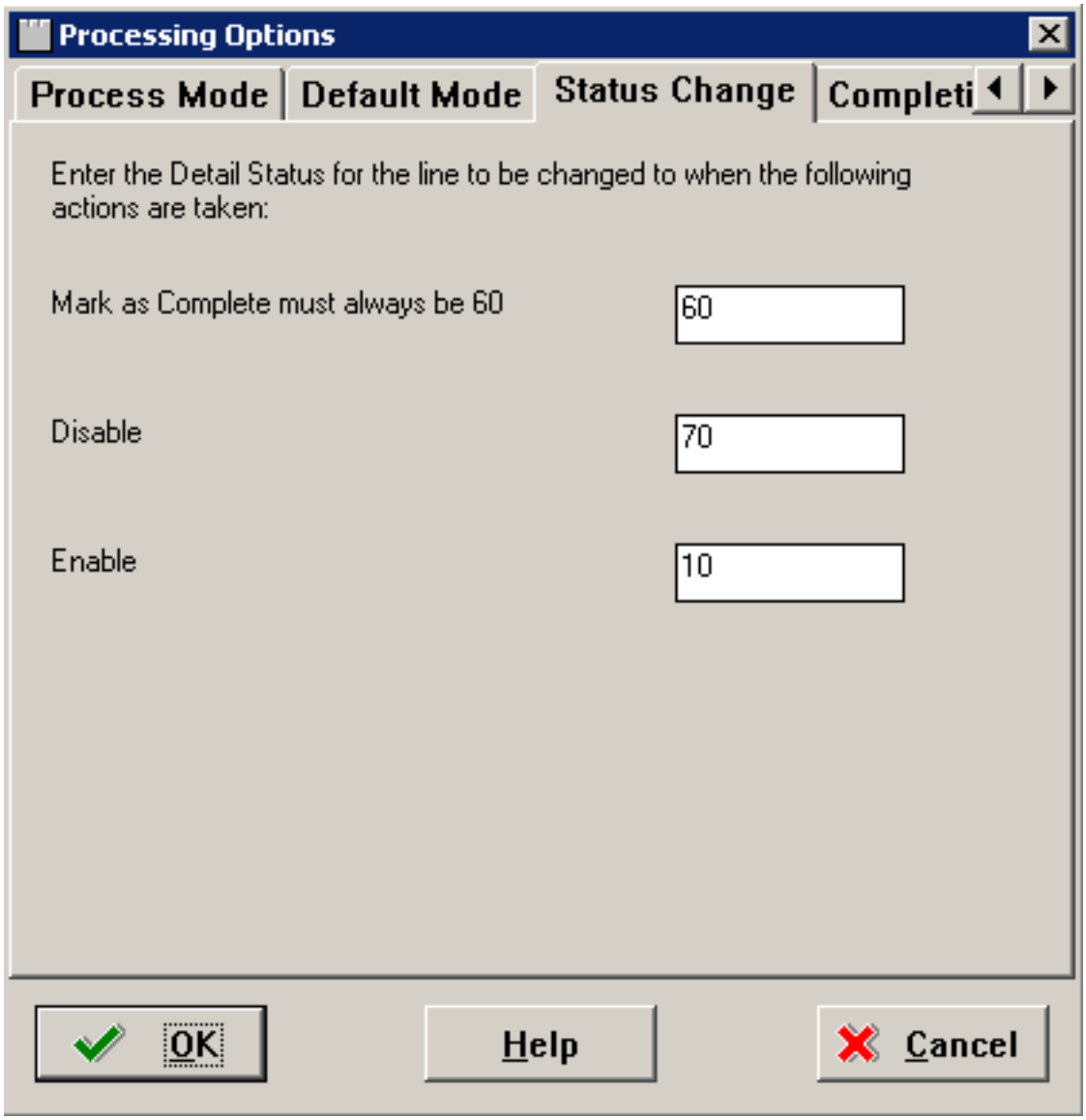
     Select whether you want the ability to select an alternate language or take the default values.
   - *Upgrade/Update Plan Generation*

     Select whether you want the ability to generate a plan automatically from locations and machines defined in a previous version of the software.

Verifying Status Change Values Have Not Changed

On the Status Change tab, this tab form appears.

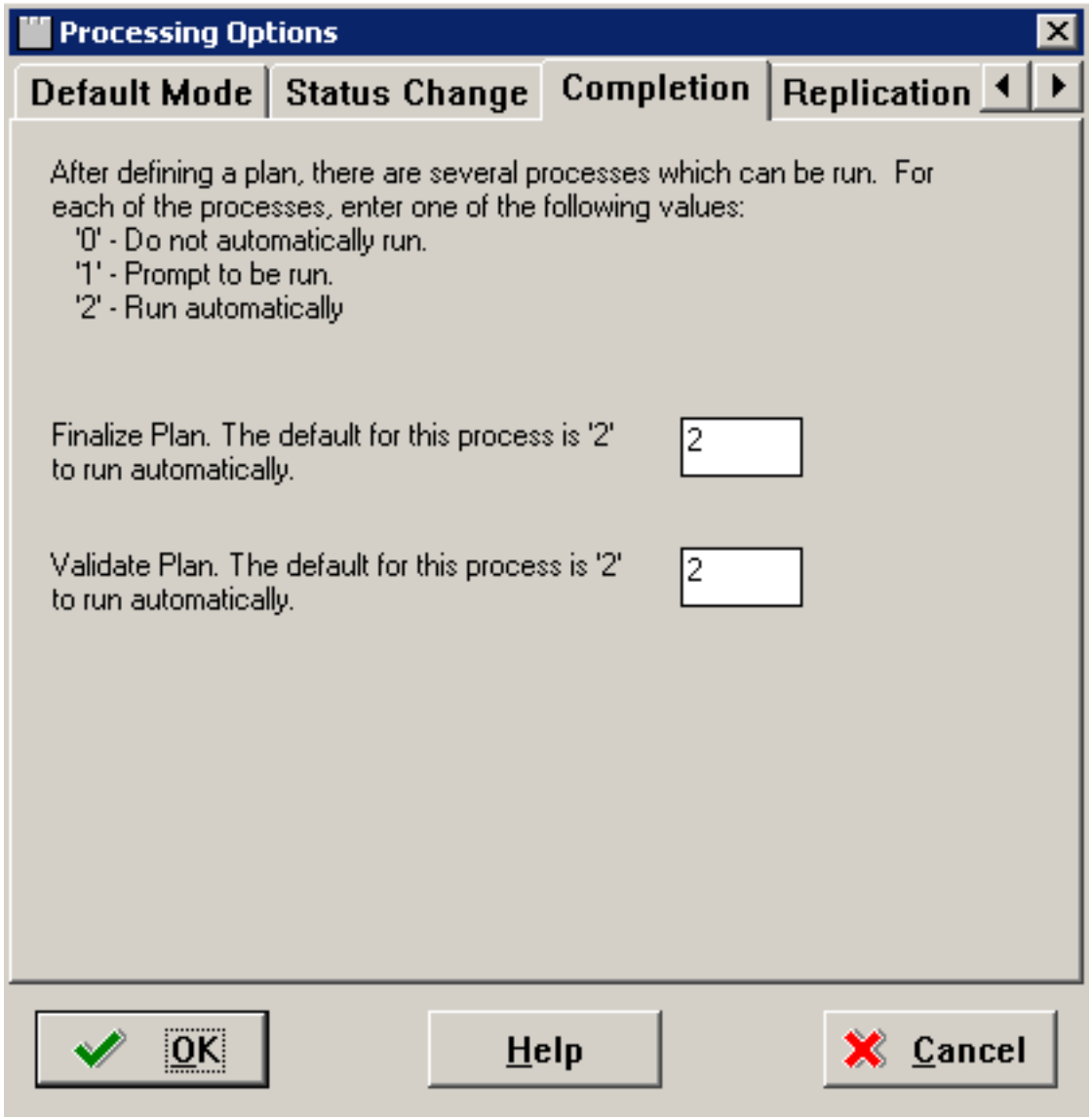
Note: Do not make any changes on this tab. These values are hard coded in the application


Processing Options
Process Mode
Default Mode
Status Change
Completi
Enter the Detail Status for the line to be changed to when the following actions are taken:
Mark as Complete must always be 60
60
Disable
70
Enable
10
OK
Help
Cancel

Specifying Plan Completion Processes

To specify plan completion processes:

1. Select the Completion tab.



2. On the Completion tab, complete the fields using these values:

   After defining the plan, the options on this tab specify which processes are run. one of the following values:

Value	Description
0	Do not run automatically.
1	Prompt to be run.

Value	Description
2	Run automatically.

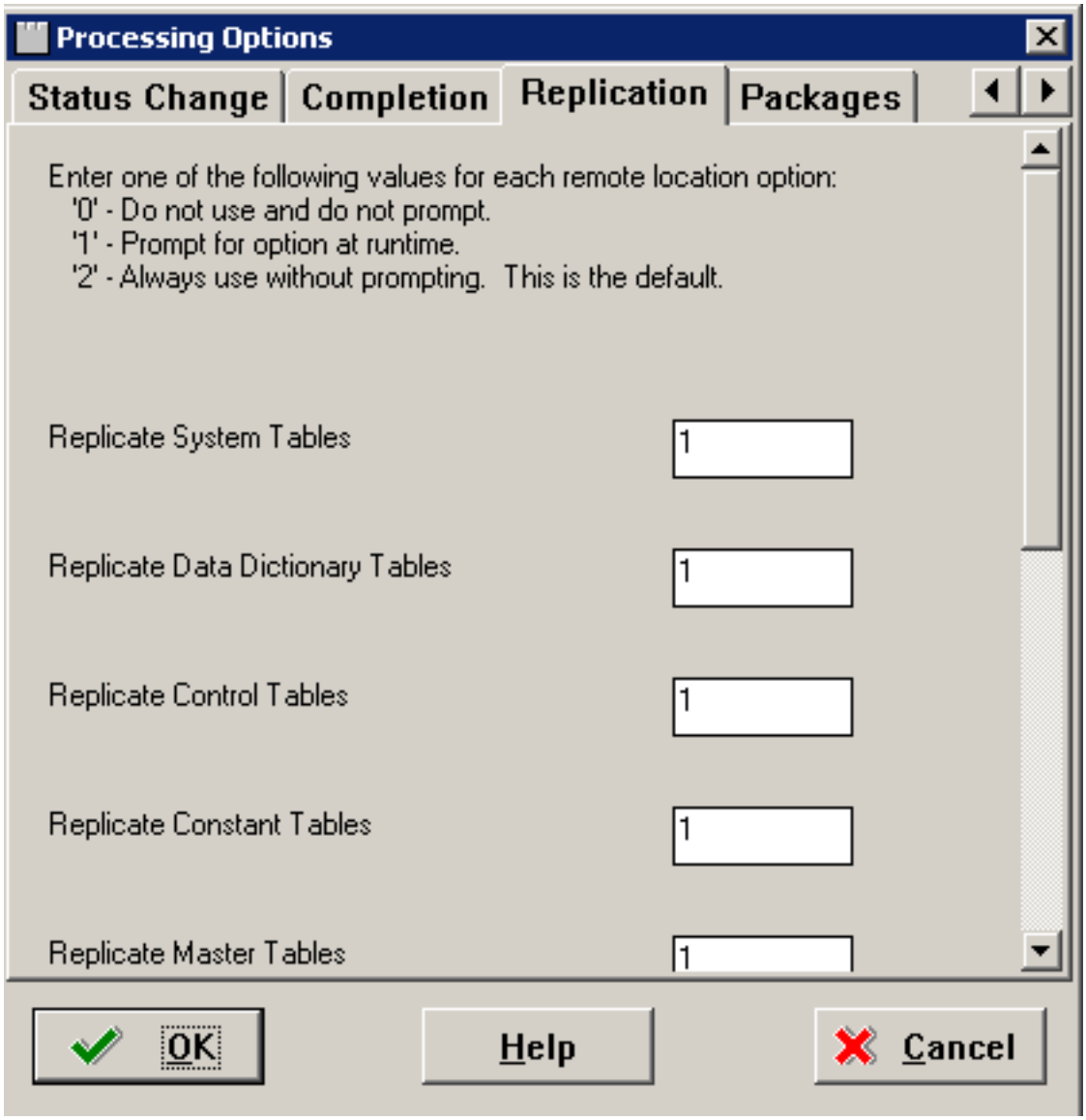
- *Finalize Plan*

  Enter the default option 2 to run automatically.
- *Validate Plan*

  Enter the default option 2 to run automatically.

Replication Options (Obsolete)

Although the Replication tab and its Processing Options still display, JD Edwards EnterpriseOne no longer natively supports replication. Therefore these Processing Options are obsolete.



Running the Installation Planner for an Upgrade

This section consists of the following tasks:

- *Starting Installation Planner*
- *Entering a Plan Description*
- *Entering Location Information*
- *Entering Deployment Server Information*
- *Entering Enterprise Server Information*
- *Enter Data Source Information for Server Map*
- *Entering HTML Web Server Information*

- *Entering Data Server Information*
- *Entering Shared Data Source Information*
- *Setting Up Environments*
- *Setting Up Environment Data Sources*
- *Adding a Remote Location*
- *Finalizing the Installation Plan*
- *Concluding the Validation Planner Report*
- *Resetting the jde.ini Prior to Running Table Conversions*
- *Clearing SQL Packages from QRECOVERY*

Starting Installation Planner

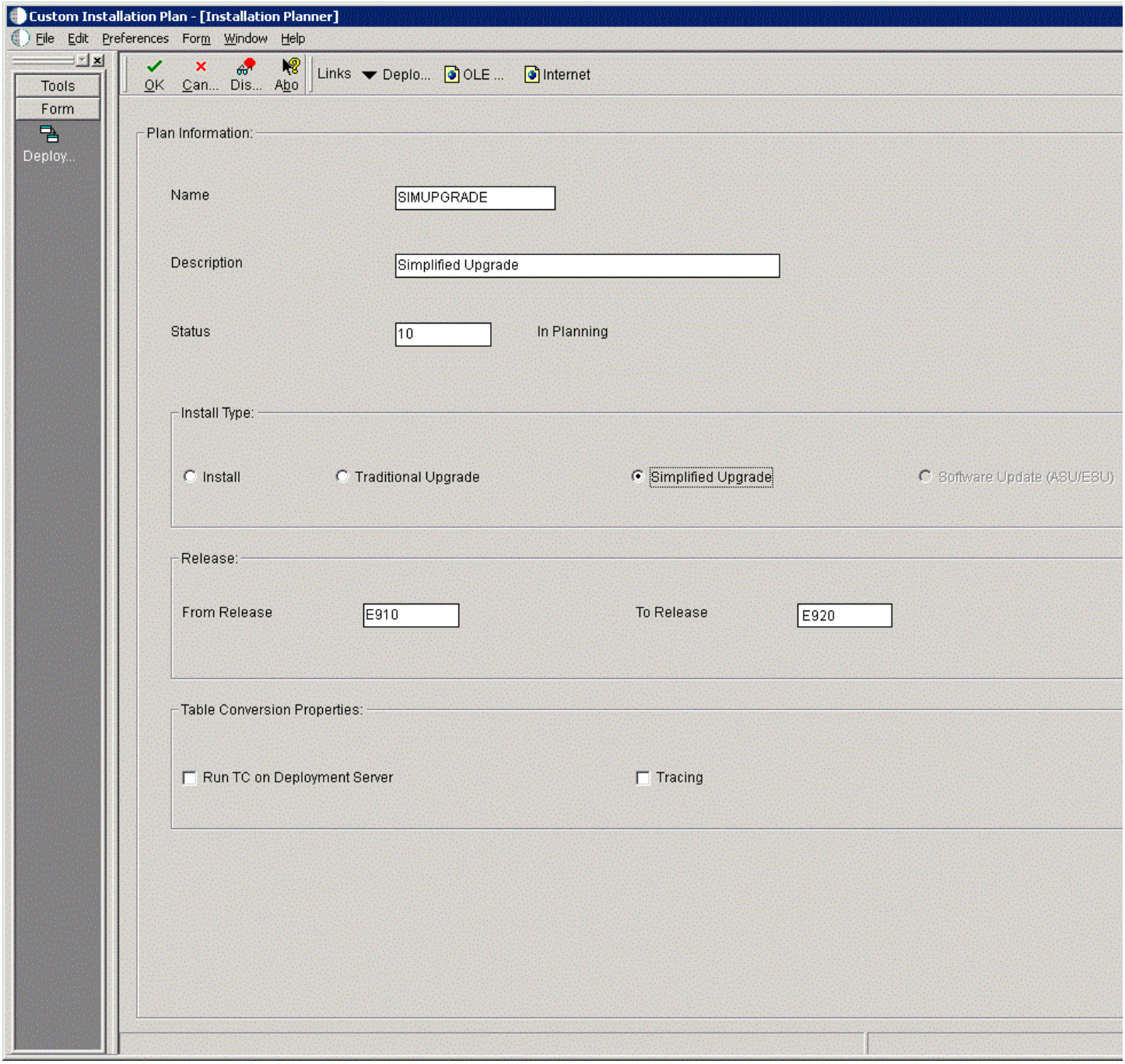
To start Installation Planner from within *JD Edwards EnterpriseOne* :

1. Go to the System Installation Tools Menu (GH961).
2. From the System Installation Tools menu, double-click Custom Installation Plan.
3. On Work with Installation Plans, click the **Add** button.

   The Installation Planner form appears. Enter a Plan description.

Entering a Plan Description

To enter a plan description:

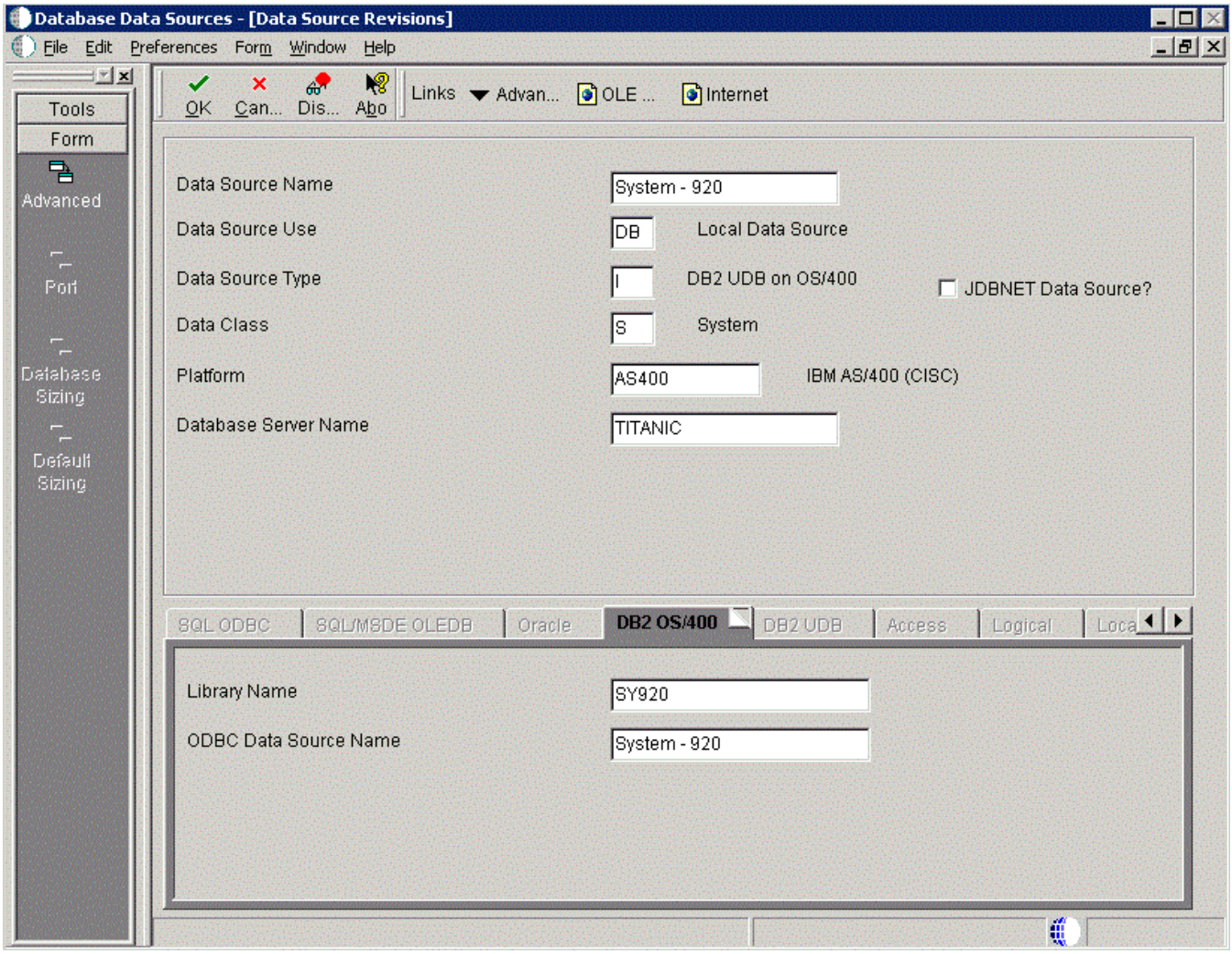


1. On Installation Planner, complete the following fields:

Field	Description
Name	Enter the name of your plan.
Description	Enter the description of your plan.
Status	Select **10**. This is the default value.
Install Type	Select **Traditional Upgrade** or **Simplified Upgrade**. **Note:** You can only choose **Simplified Upgrade** for valid target releases, which are JD Edwards EnterpriseOne Applications Release 9.0 Update 2 and greater. Otherwise, the Installation Planner logic displays an error. If the Installation Planner detects registry settings indicating a previous installation of JD Edwards EnterpriseOne has been installed on this Deployment Server, it automatically changes the **Install Type** to **Traditional Upgrade**. You can also manually change the Install Type to **Traditional Upgrade** or **Simplified Upgrade** (for supported target releases only). If the previous installation of the Deployment Server is on a different machine, or if this installation is on a remote Deployment Server, the **Install Type** is set to **Install**. In either of these cases, you must manually change the **Install Type** to **Traditional Upgrade** or **Simplified Upgrade** at which point the Installation Planner prompts you for the data source information in a subsequent screen.
From Release	Enter the number of the release you are upgrading from. For example, enter **E910** for Release 9.1.
To Release	Verify that the release number is *E920* (the default value).
Table Conversion Properties	Check box to run table conversions on the Deployment Server. The default is to run on the Enterprise Server.
Tracing	Turns on debug logging.
Include Languages	This is an optional selection that is only available if you have previously specified this Custom plan to install languages. Select yes if you are installing an alternate language.

2. Click the **OK** button.

> **Note:** If you are installing the Deployment Server on the same machine as a previous release, and the Installation Planner has detected that previous release, you can proceed to the next step. However, if you manually changed the **Install Type** to **Traditional Upgrade** or **Simplified Upgrade**, most likely because the previous release of JD Edwards EnterpriseOne was installed on a different machine, or this installation is on a remote, Deployment Server. In that case you are presented with the following screen in which you must enter the data source information that will enable the Installation Planner to locate the previous release.

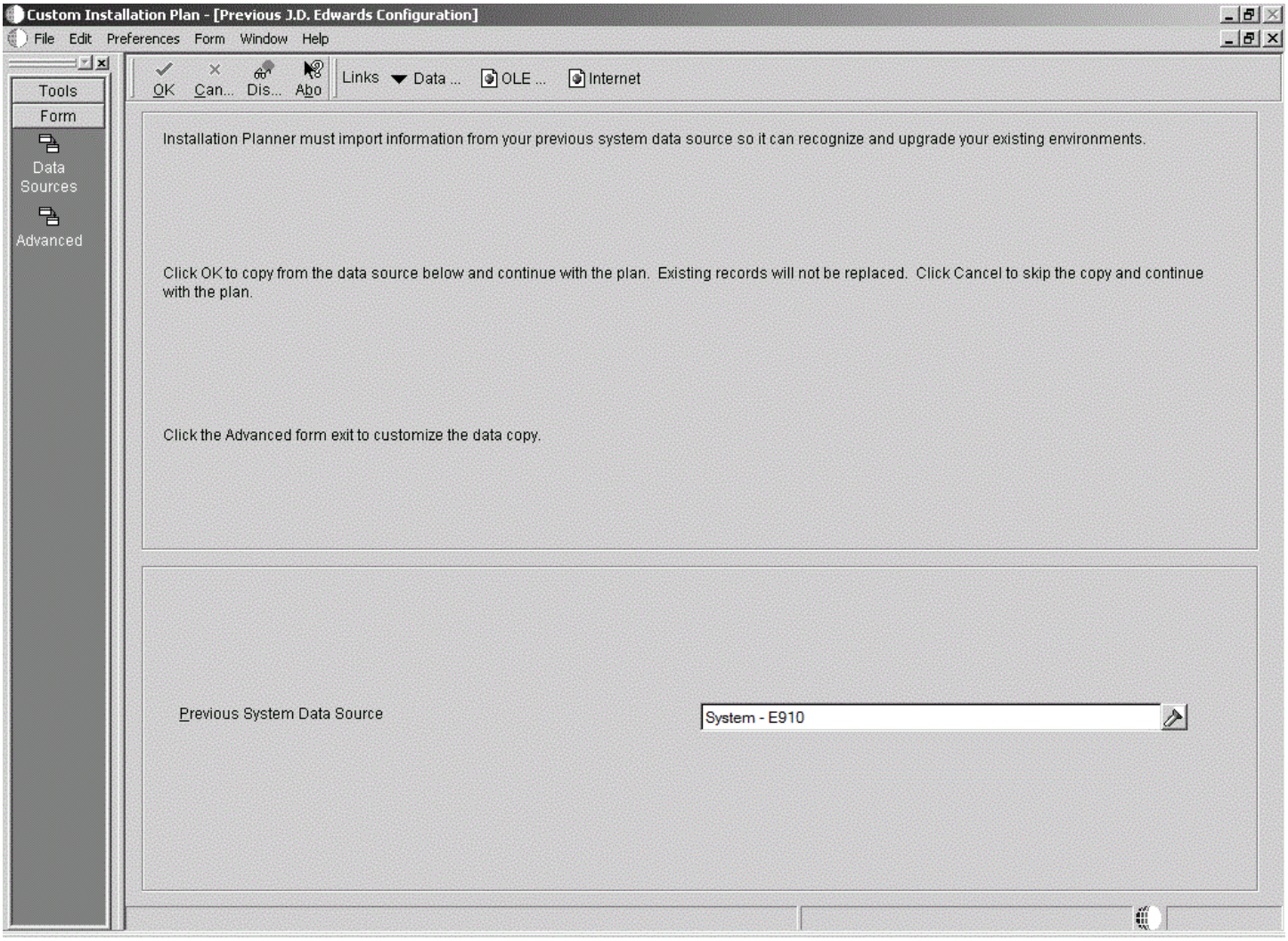


On Data Source Revisions, complete the following fields:

Field	Description
Data Source Name	Enter the name of the System data source to be upgraded. For example: System - 910
Data Source Use	You can accept the default value of DB.
Data Source Type	Choose the type of data source. Valid value is: **I -** ***IBM i***
Platform	Enter your platform. For example, AS400.
Database Server Name	Enter the name of your database server on which your previous System data source resides.
Library Name	Enter the Library Name.
ODBC Data Source Name	Enter the ODBC data source name.

3. Click the **OK** button.

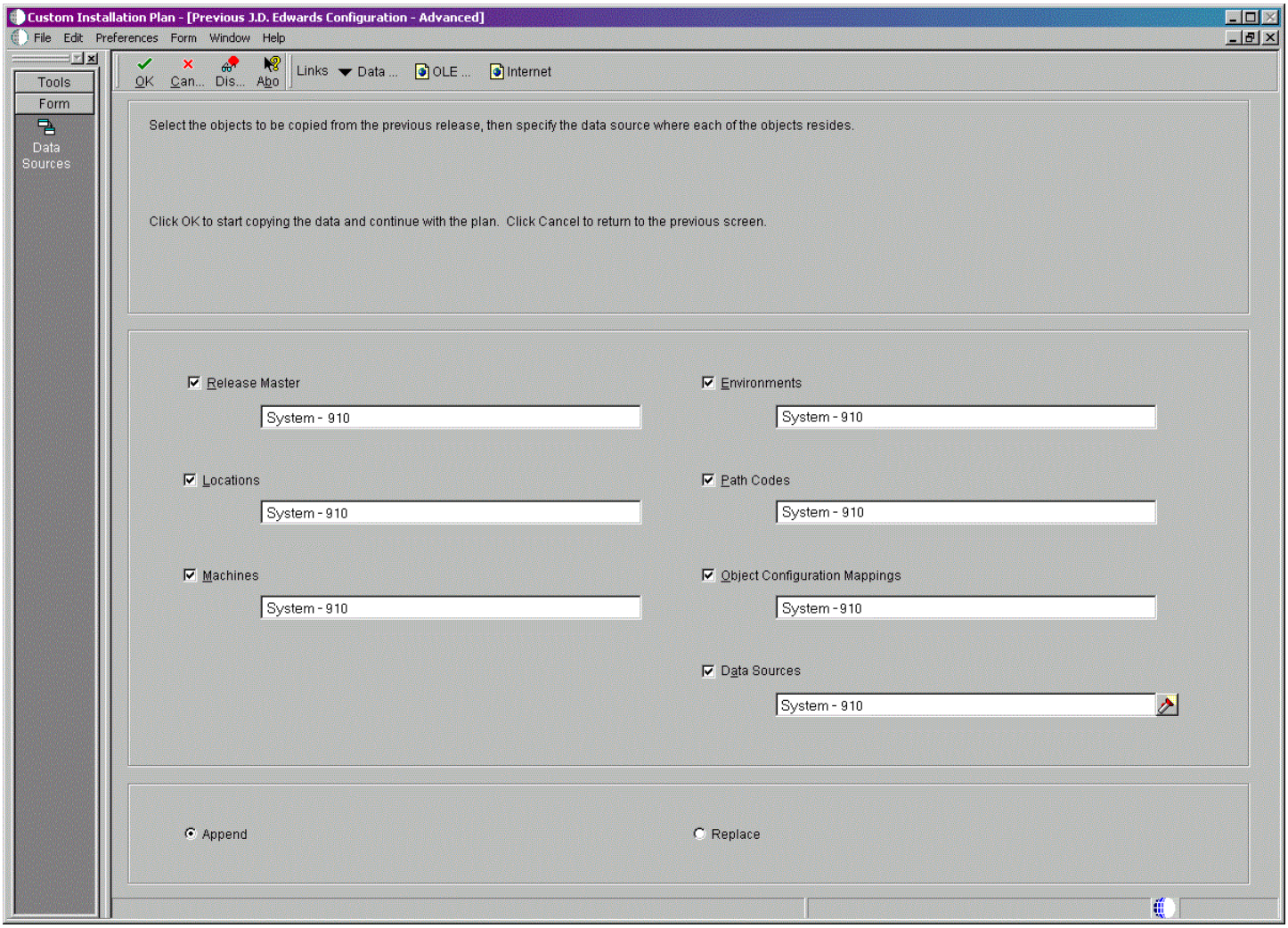
> **Note:** If you are installing the E920 Deployment Server on the same machine (as the previous release), the Installer Planner automatically detects the local System data sources and uses it to configure your existing environment. If you are installing your E920 Deployment Server on a different machine (as the previous release), at this point you will to proceed as described in the section of this guide entitled: *Verify and Configure Data Source for Previous Release*.


Custom Installation Plan - [Previous J.D. Edwards Configuration]
File Edit Preferences Form Window Help
Tools
Form
Data Sources
Advanced
OK Can... Dis... Abo
Links Data ... OLE ... Internet
Installation Planner must import information from your previous system data source so it can recognize and upgrade your existing environments.
Click OK to copy from the data source below and continue with the plan. Existing records will not be replaced. Click Cancel to skip the copy and continue with the plan.
Click the Advanced form exit to customize the data copy.
Previous System Data Source
System - E910

4. This form imports information from your previous system data source. The previous system data source you are upgrading from should be prepopulated. Use the Data Sources form exit to verify the data source is set up correctly.
5. If this is correct, click the **OK** button and proceed to Step 9. Click the **Advanced** form exit and continue with the next step. This screen sets up to copy information from the previous system data source into planner while

providing some default information for the user. It is also used for spec merge and table conversions to provide access to the previous environments.

> **Note:** IIf you want to force the system to retry the imports, click the **Advanced** form exit, which presents the following screen labelled Previous J.D. Edwards Configuration - Advanced. On that screen, you should enable the checkboxes for all data sources and then click the OK button, which forces the system to import the information from your previous data source. Under normal circumstances it should not be necessary to force a form import.

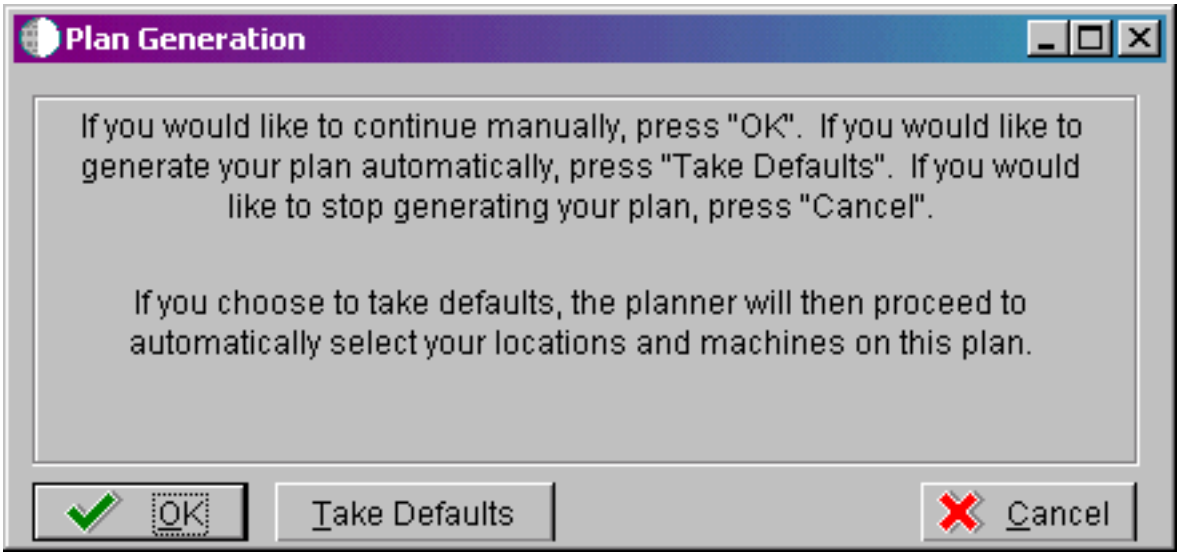

Custom Installation Plan - [Previous J.D. Edwards Configuration - Advanced]
File Edit Preferences Form Window Help
OK Can... Dis... Abo
Links Data ... OLE ... Internet
Tools
Form
Data Sources
Select the objects to be copied from the previous release, then specify the data source where each of the objects resides.
Click OK to start copying the data and continue with the plan. Click Cancel to return to the previous screen.
Release Master
System - 910
Environments
System - 910
Locations
System - 910
Path Codes
System - 910
Machines
System - 910
Object Configuration Mappings
System - 910
Data Sources
System - 910
Append
Replace

Note: The **Release Master** checkbox may not be selected, but the release master has already been copied at this point in the process.

6. Select the objects to be copied from the previous release, then specify the data source where each of the objects reside.
7. Select the appropriate radio button for your data load:

Radio Button	Description
Append	Adds records to your existing tables. This is the typical selection.
Replace	Clears existing tables prior to loading new data.

8. Click the **OK** button.
9. Select one of the following options:



Note: The above screen may not always appear for upgrades, which is preferable because the recommended method is to step through the planner rather than taking defaults. See *"Caution When Choosing Take Defaults"* below.

- From this form, you have the option to automatically enter the locations and machines into the plan that you defined in the previous version of the software.

10. Choose a method for generating your plan:

    - To manually create your plan, click the **OK** button and continue with *Entering Location Information*.
    - To enable the system to automatically enter the locations and machines from the previous version, click the **Take Defaults** button.

      The machines that were imported from the previous system data source are entered into the current plan. Skip the sections on entering locations, Deployment Servers, Enterprise Servers, and machines or servers, and continue with *Entering Shared Data Source Information*.

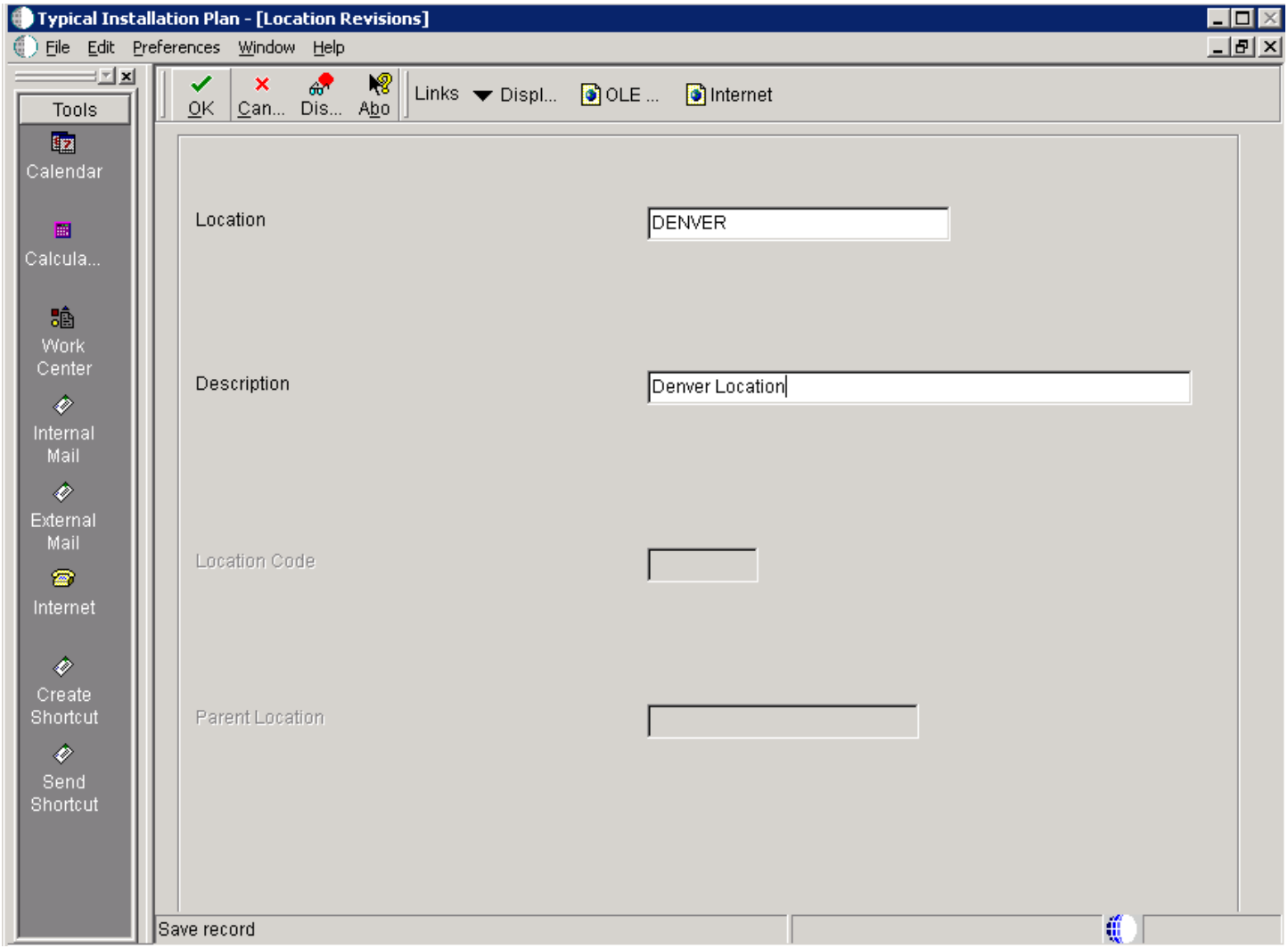
      > **Note:** In order to ensure the validity of all subsequent plan information, it is strongly recommended that even advanced users should not choose this Take Defaults option. Instead, you should step through plan and verify that the Planner is populating information exactly as you expect to match your requirements.

    - To exit the plan, click the **Cancel** button.

Entering Location Information

A location groups related Deployment Servers for use in a multi-tier environment.

To enter location information:



1. On Location Revisions, complete these fields:

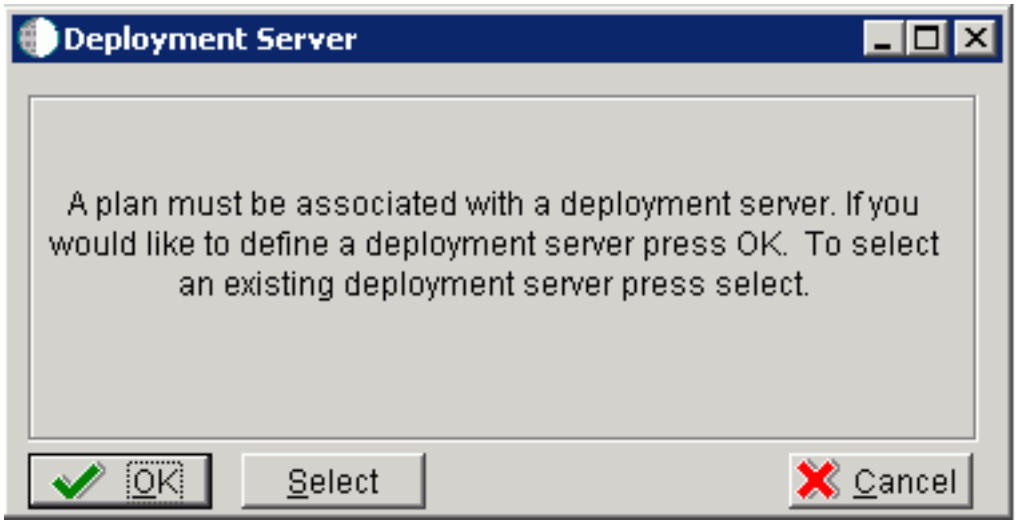
Field	Description
Location	Enter the location to which this plan applies. The location can be a city, company headquarters, or a division of the company.
Description	Enter a description for this location.
Location Code	If this is the base location, this field is only available when you are adding the base location. If you are editing an existing base location, the field is unavailable.
Parent Location	If this is the base location, this field is only available when you are adding the base location. If you are editing an existing base location, the field is unavailable.

2. Click the **OK** button.

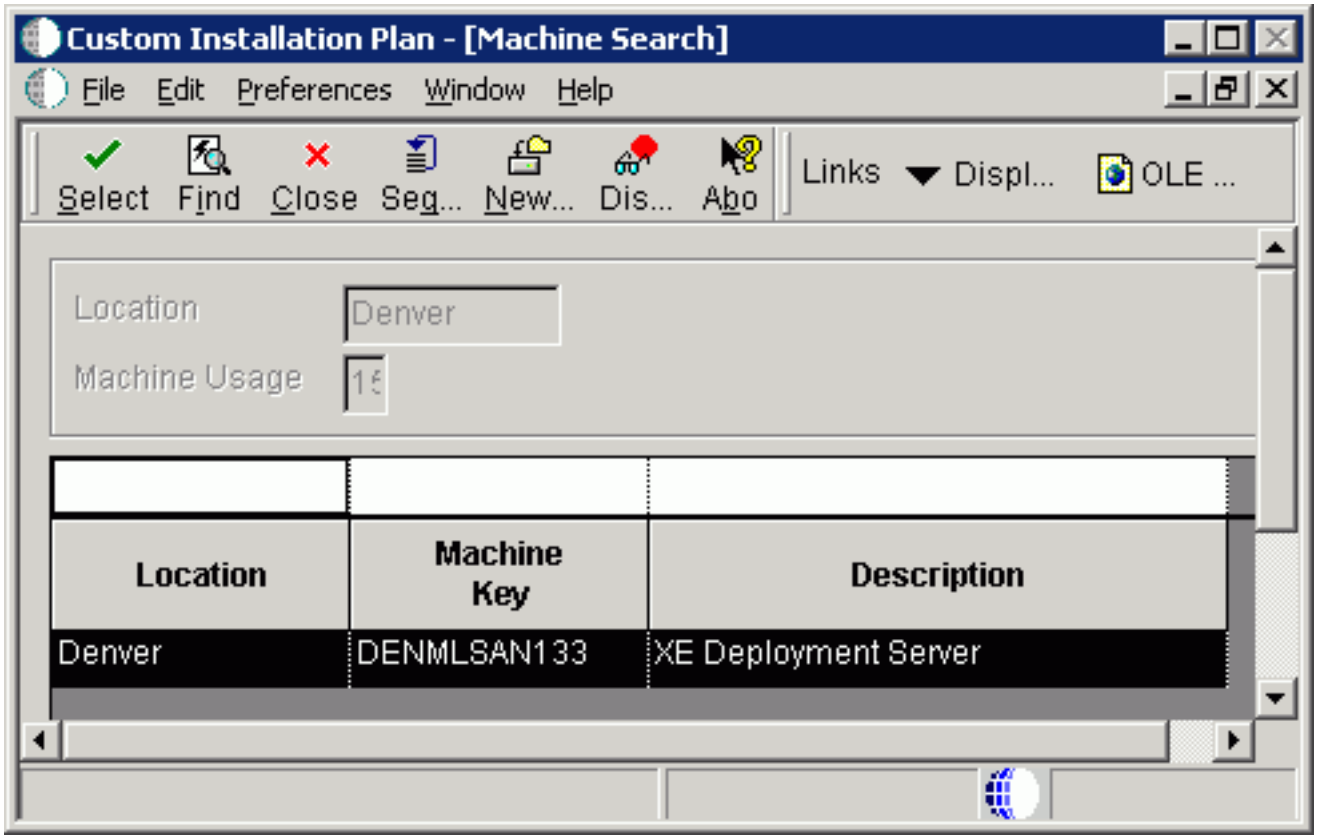
Entering Deployment Server Information

Once a plan location is specified, specify the information for the primary Deployment Server you will use in this plan. While *Release 9.2* enables more than one Deployment Server to be defined, only the primary Deployment Server is defined at this time. You can choose a primary Deployment Server from the list of existing servers or you can enter information for a new server.

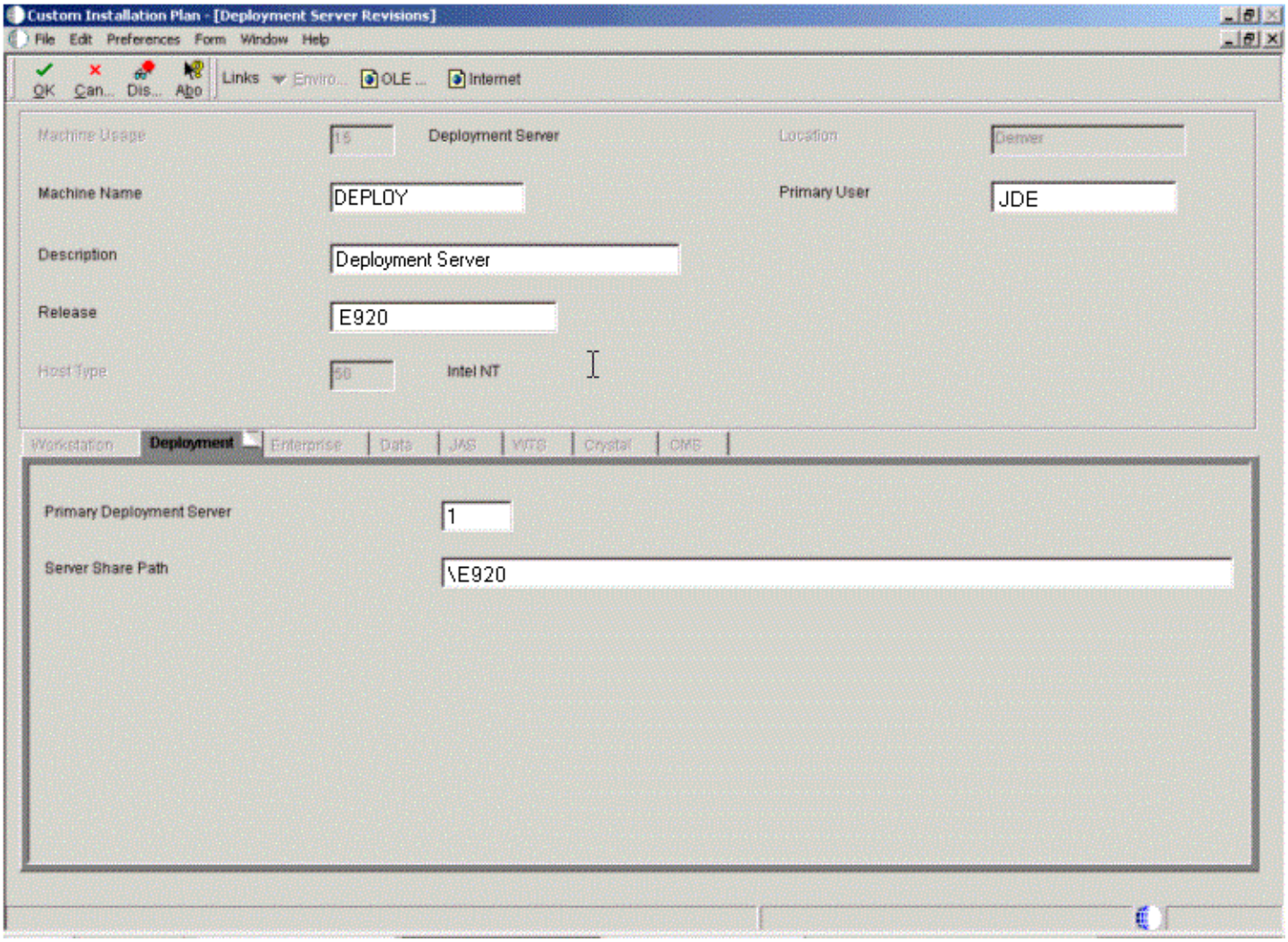
> **Note:** If you installed JD EnterpriseOne Files to a remote Deployment Server, you should click the **OK** button to define a new Deployment Server. The deployment server name is the remote machine name by default.



1. On Deployment Server, click the **OK** button to define a new Deployment Server, or click the **Select** button to choose from a list of existing Deployment Servers.



If you choose Select, you are presented with the Machine Search table, from which you can make your selection.



2. On Deployment Server Revisions, complete or verify these fields:

Field	Description
Machine Usage	Displays the value **15** by default to indicate that this is a Deployment Server.

Field	Description
Machine Name	Displays the name of the Deployment Server appears by default. The name is case sensitive, should not exceed 15 characters, and should not contain any special characters. **Remote Deployment Server.** If you installed JD EnterpriseOne Files to a remote Deployment Server, you should click the **OK** button to define a new Deployment Server. The deployment server name is the remote machine name by default.
Description	Enter a long description for the machine. This description should include the location with which this Deployment Server is associated and whether or not it is the primary server.
Release	Enter the *Release 9.2* release number you are installing or use the visual assist button to choose one from the list. The default value is *E920* .
Host Type	Displays the value of **50** appears by default to indicate that the server type is Intel NT.
Location	Displays your current location as the default value.
Primary User	Specify the user running the services on the Enterprise Server. The default value for Primary User is JDE.

3. On the Deployment tab, complete these fields:

Field	Description
Primary Deployment Server	Define the hierarchy of the servers. Values are: 1- Primary Deployment Server (default value) 0 - Secondary Deployment Server The server share name of the directory to which you installed *Release 9.2* on your Deployment Server. Verify that the server share name for *Release 9.2* is **\ *E920*** .
Server Share Path	Defines the path to the share name. For example, **\E920**. **Caution:** This value is derived from Release Master and should not be manually changed.

4. Click the **OK** button.

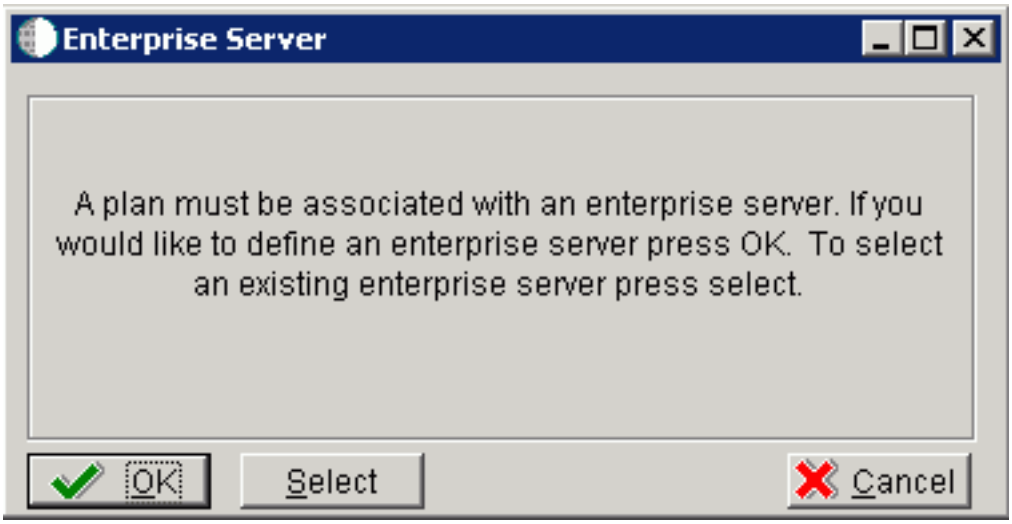
   > **Tip:** If you enter invalid information into a tab field, a stop sign symbol appears next to the tab name, such as Deployment Server. For more information about the error, click the **Stop Sign** icon in the bottom right-hand corner of the form.

   Release 9.2 asks if you want to add another Deployment Server.
5. To add another Deployment Server, click the **Yes** button and repeat steps 1 through 3.
6. To continue with Installation Planner setup, click the **No** button.

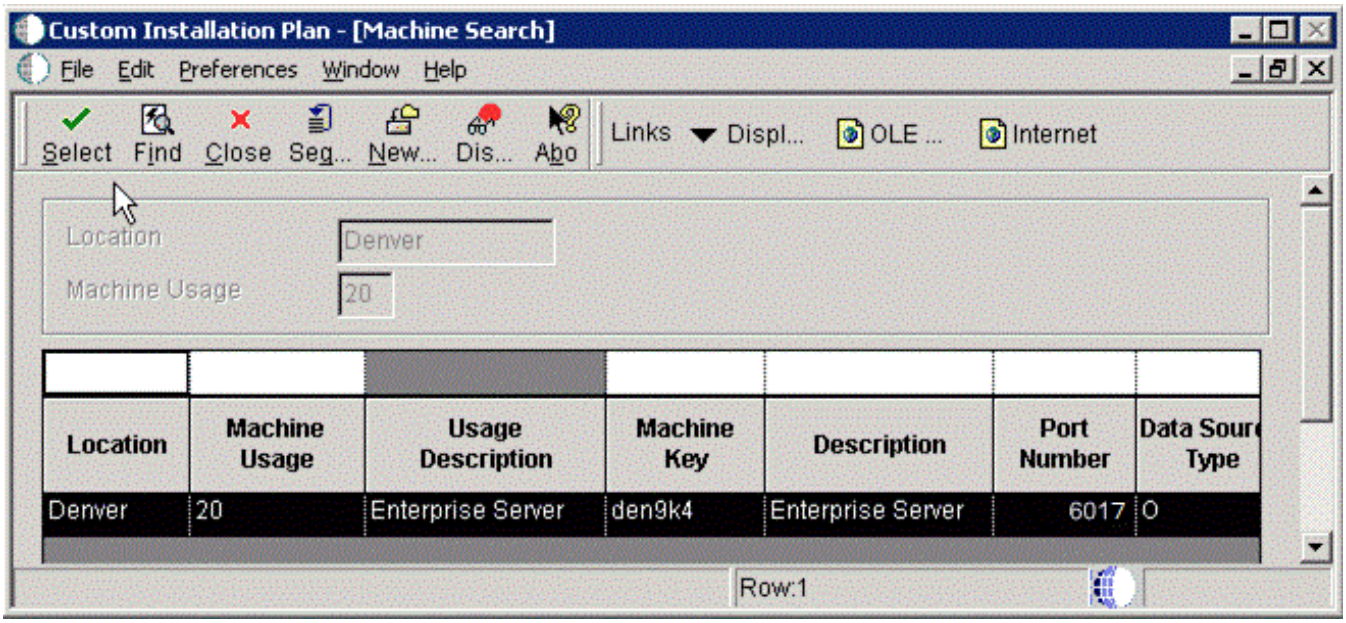
Entering Enterprise Server Information

> **Note:** During the definition of the Enterprise Server, a port number must be defined. While Enterprise Servers running the same release can use the same port number, an Enterprise Server running two different versions of software must use two different port numbers.

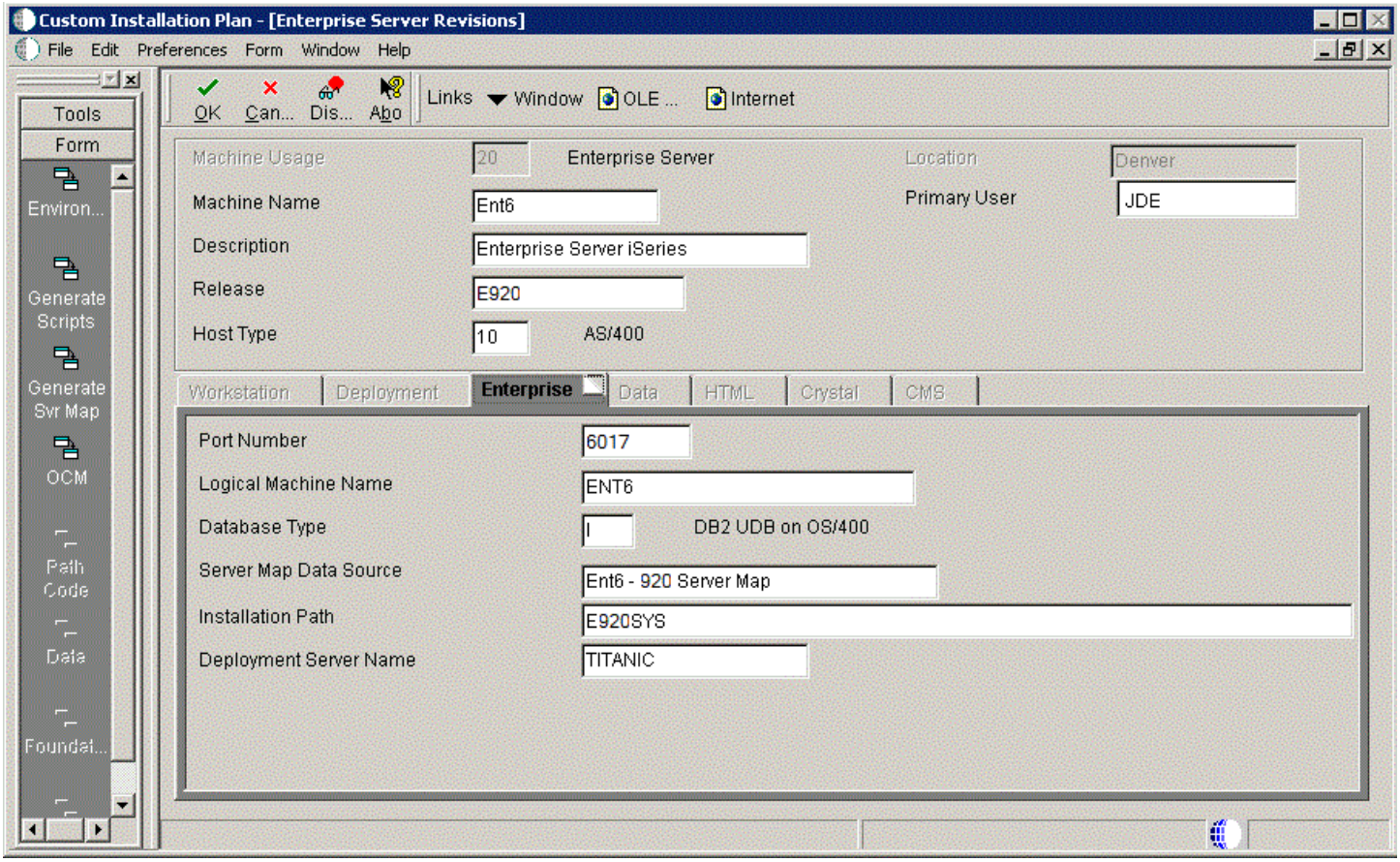
To enter Enterprise Server information:



1. On Enterprise Server, click the **OK** button to define a new Enterprise Server, or click the **Select** button to choose from a list of existing Enterprise Servers.



If you choose **Select**, you are presented with the Machine Search table, from which you can make your selection.


Custom Installation Plan - [Enterprise Server Revisions]
File Edit Preferences Form Window Help
OK Can... Dis... Abo
Links Window OLE ... Internet
Tools
Form
Environ...
Generate Scripts
Generate Svr Map
OCM
Path Code
Data
Foundat...
Machine Usage 20 Enterprise Server
Location Denver
Machine Name Ent6
Primary User JDE
Description Enterprise Server iSeries
Release E920
Host Type 10 AS/400
Workstation Deployment Enterprise Data HTML Crystal CMS
Port Number 6017
Logical Machine Name ENT6
Database Type I DB2 UDB on OS/400
Server Map Data Source Ent6 - 920 Server Map
Installation Path E920SYS
Deployment Server Name TITANIC

2. On Enterprise Server Revisions, verify or complete these fields:

Field	Description
Machine Name	The name of the primary Enterprise Server. The name is case sensitive and should not contain any special characters. Because the machine name is used to create the Server Map datasource name, and because the Platform Pack Installer does not restrict you from entering a machine name that results in a datasource name greater than 30 characters; if the machine name for the Enterprise Server is longer than 13 characters, the resulting datasource name will be longer than the allowed 30 characters. For example, if your machine name is 15 characters (A23456789012345), the base datasource name input into the Planner would be: **`A23456789012345 - 920 Server Map`**. **Note:** The field in table F98611 is a hard restriction; the field only allows 30 characters. The actual field size cannot be modified or changed. When the Planner runs it truncates the value to 30 characters because that is the restriction in the F98611 table. The Platform Pack does not truncate the value when it builds the **`jde.ini`** for the Enterprise Server. Therefore, any value greater than 30 characters will result in a mismatch between the **`jde.ini`** and the F98611 table. That is, using the previous example, the **`jde.ini`** would have the full length value **`A23456789012345 - 920 Server Map`** (which is 32 characters) while the F98611 populated by the Planner would have a value of **`A23456789012345 - 920 Server M`**. To remedy, you could do any one of the following: o Manually modify values in table F98611 to match the truncated value in the **`jde.ini`** file. o Ensure that the value is not truncated by limiting the datasource name to 30 characters (this would mean limiting the machine name for the Enterprise Server to 13 characters). o Manually truncate the value in the F98611 table (for example, **`A23456789012345 - 920 Svr Map`**. In any case, you **must** ensure that the values for Server Map datasource names in the F98611 table exactly match those in the **`jde.ini`** file on the Enterprise Server.
Description	Enter a description for the machine.
Release	Enter the *Release 9.2* release number to which this plan applies, or use the visual assist button to choose one from the list. The default value is *E920* .
Host Type	Click the visual assist button and select the type of Enterprise Server you are adding to the plan. In this case, IBM i (AS/400).
Location	Displays the location chosen for this plan by default.
Primary User	Specify the user to whom an email is sent when a package is deployed. The default value for Primary User is JDE.

Field	Description

Note: The case of machine name must also match the network ID for that machine.

CAUTION: For information on supported clustering environments, see *Release 9.2 on a Cluster* in *JD Edwards EnterpriseOne Tools Server and Workstation Administration Guide* and the clustering vendor's software documentation.

3. On Enterprise Server Revisions, select the Enterprise tab and complete or verify these fields:

Field	Description
Port Number	The port number value (*6017*) for this Enterprise Server as supplied from the **`jde.ini`** .
Logical Machine Name	Displays this information by default when the host type is entered. The name is case sensitive, should not exceed 15 characters, and should not contain any special characters.
Database Type	Enter the value for your database: **I - DB2 400 (*DB2 for IBM i*)**
Server Map Data Source	Whenever you enter a host type, the Installation Planner populates this field with a default value: *machinename* - 920 Server Map where *machinename* is the name of your machine.
Installation Path	Verify that the default value is the installation directory path to which you want to install *Release 9.2* on the Enterprise Server. Make sure the value is specific to your version of the release. For example, for *Release 9.2* the default path is: **`\JDEdwards\PPack\ E920SYS`** This is the system library. **Caution:** You must change the value that defaults into the *Installation Path* field as shown in the screen capture above.
Deployment Server Name	Using the visual assist button, choose the name of the Deployment Server to which this Enterprise Server is attached. A Deployment Server name appears in this field by default, but it can be changed if necessary.

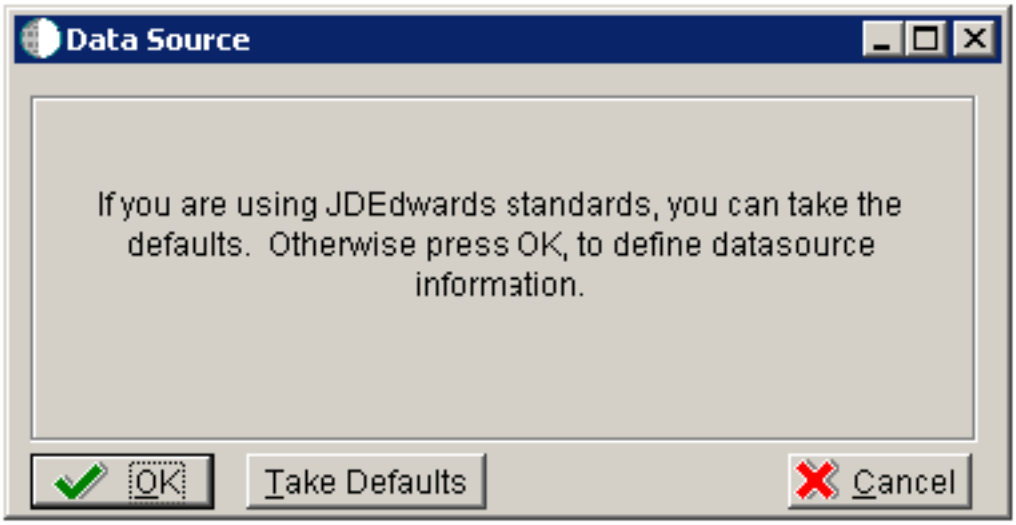
Field	Description

Note: If you change the port number to a value other than *6017* , you must also change this setting to be synchronous between both the `jde.ini` on the Enterprise Server and Development Client.

4. Click the **OK** button.

Enter Data Source Information for Server Map

To enter data source information for Server Map:



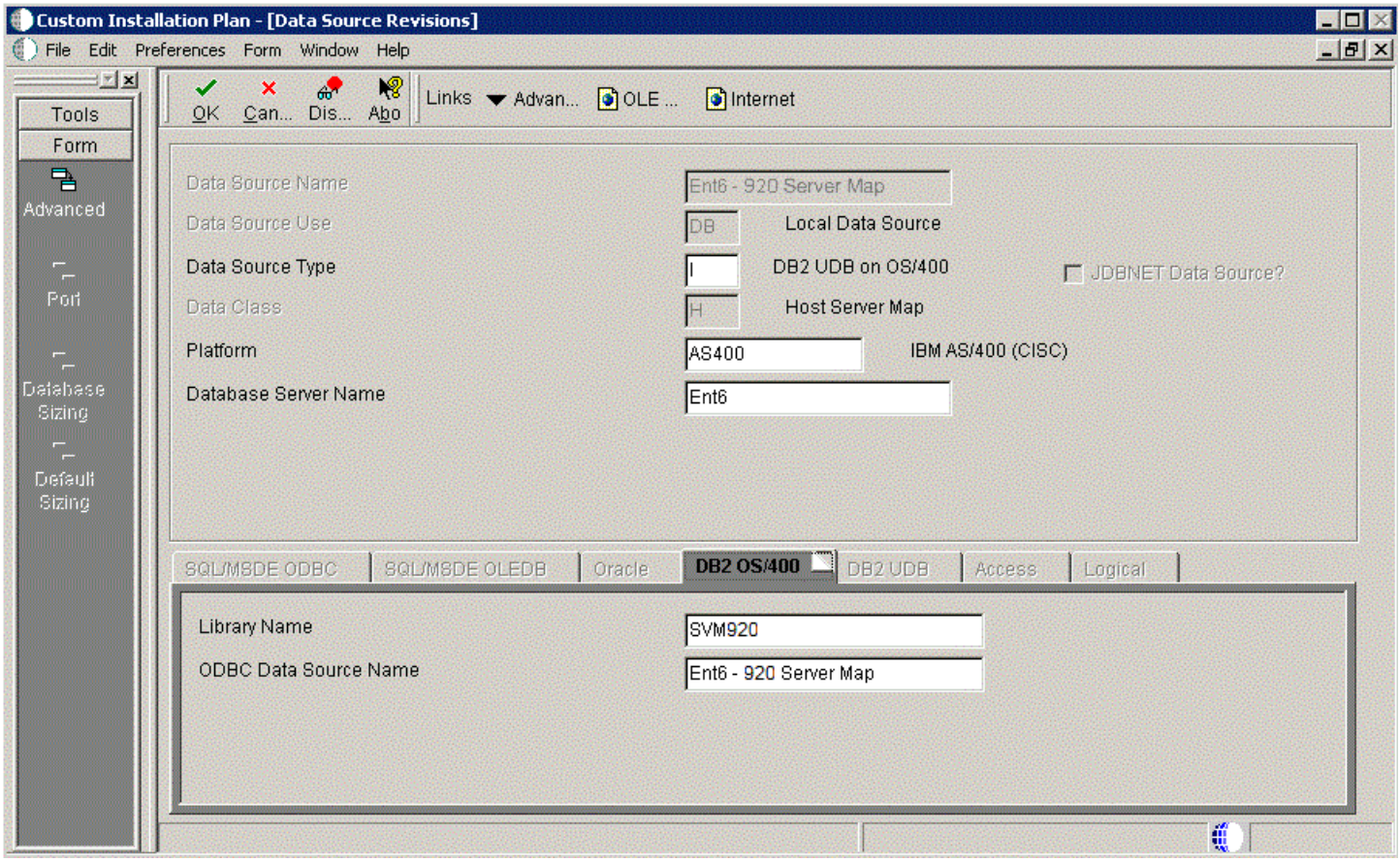
1. On Data Source, you are prompted to enter Data Source Information for the Enterprise Server.

   Choose one of these options:

   - Click the **OK** button to continue entering unique data source information. If you choose this option, continue with this task.
   - Click the **Take Defaults** button to select the default data. If you choose this option, you can skip to Section, *"Caution When Choosing Take Defaults"*.

   > **CAUTION:** In order to ensure the validity of all subsequent plan information, it is strongly recommended that even advanced users should not choose this Take Defaults option. Instead, you should step through plan and verify that the Planner is populating information exactly as you expect to match your requirements.

   > **Tip:** If you do not follow the recommendation as outlined in the "Caution When Choosing Take Defaults" above, a dialog is displayed prompting you for the Oracle connect string.



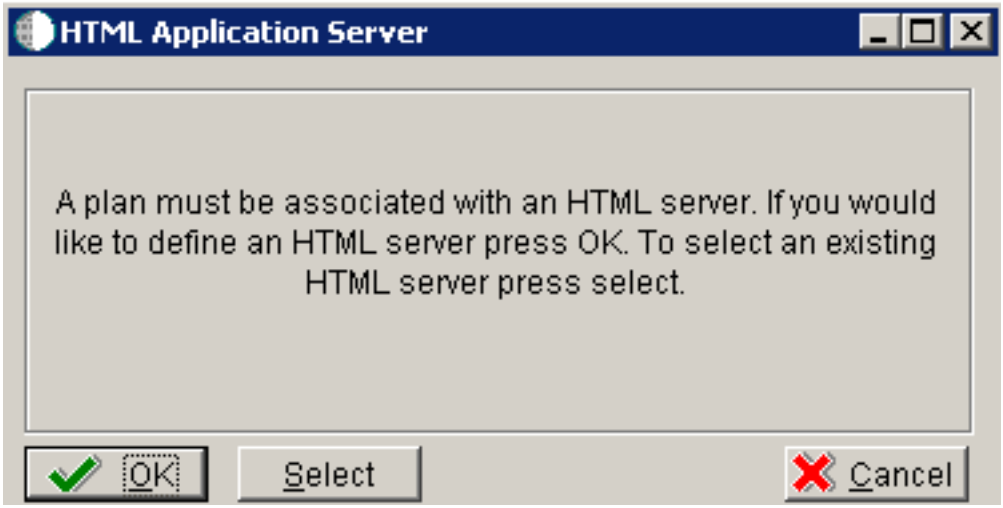
2. On Data Source Revisions, verify the accuracy of the Server Map data source.
3. Click the **OK** button.

Entering HTML Web Server Information

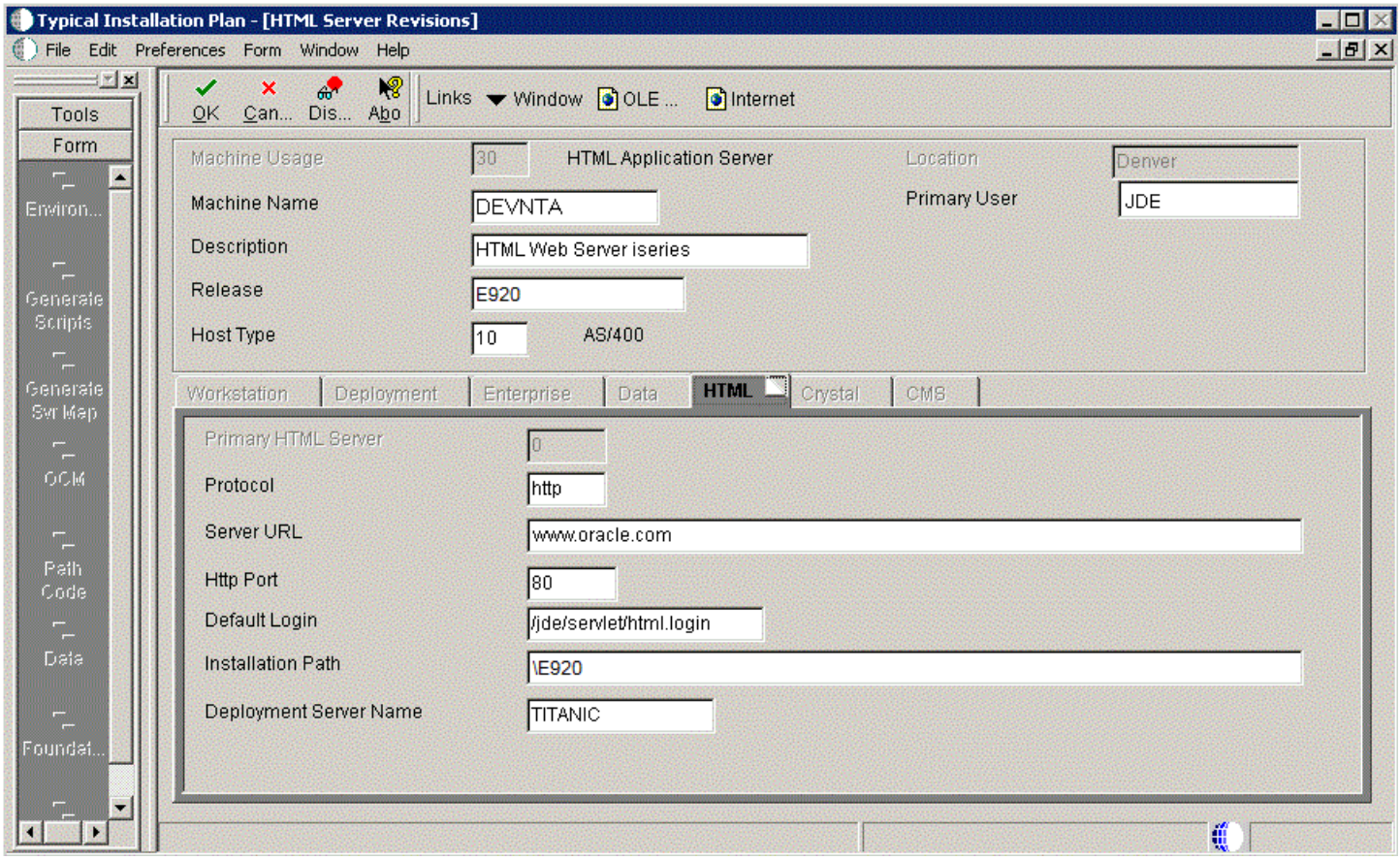
Note: For *Release 9.2* the current terminology and that used in this guide is to refer to the machine running the JD Edwards EnterpriseOne Java Application Server (JAS) as the HTML Web Server. Functionally, these terms are all synonymous. However, this guide only uses the terms JAS or Java Server when explicitly labeled as such by the software.

CAUTION: The HTML Web Server is mandatory for the majority of JD Edwards EnterpriseOne applications because the end-user applications are only accessible through a web interface.

To enter HTML Web Server information:



1. On the HTML Application Server dialog, click the **OK** button to continue entering HTML Web Server information, or click the **Select** button to select an existing HTML Web Server.



2. On HTML Server Revisions, complete these fields:

Field	Description
Machine Usage	The default value of 30 indicates that this is a HTML Web Server.

Field	Description
Machine Name	Enter the name of your HTML Web Server. The name is case sensitive, should not exceed 15 characters, and should not contain any special characters.
Description	Enter a description of the HTML Web Server machine.
Release	Enter *E920* to indicate the release number that you are installing.
Host Type	The default value of 50 specifies the server type as Intel NT. Select the correct server type.
Location	The location chosen for this plan appears in this field by default.
Primary User	The user to whom an email is sent when a package is deployed. The default for Primary User is listed in the **JDE.INI**.

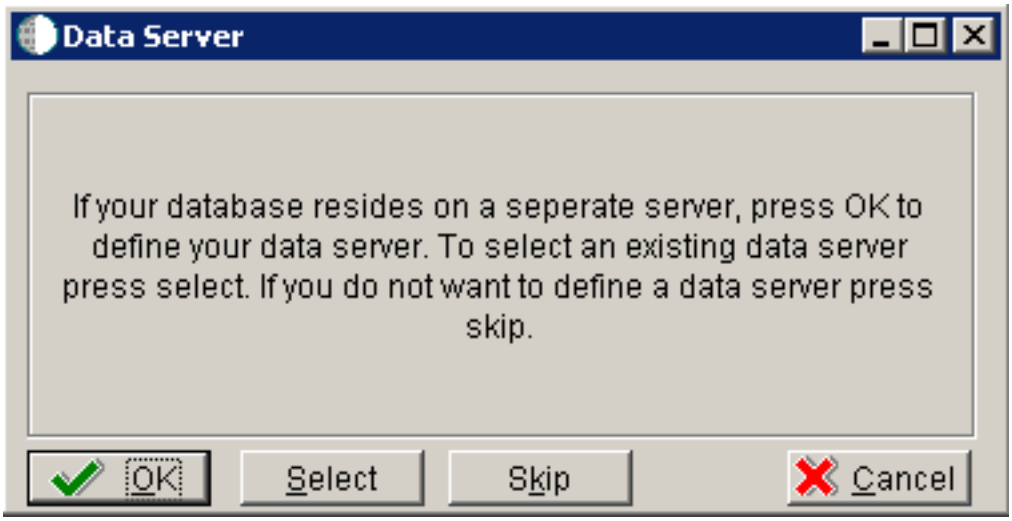
3. On the HTML tab, complete these fields:

Field	Description
Primary HTML Server	When the system code generates an email message with a web shortcut pointing to a form, the web shortcut generated points to the "Primary" HTML Web Server. Only one of all the HTML Web Servers defined in installation planner can be defined as primary ("1").
Protocol	This is the protocol used by the HTML Web Server. Valid values are **http** or **https**.
Server URL	This is the Domain Name System (DNS) host name of the HTML Web Server. For example: www.oracle.com
HTTP Port	This is the port number the HTML Web Server is listening to. For HTTP, the typical port number is 80. For HTTPS, the typical port number is 443. **Note:** You can choose to implement a HTML Web Server using a different port number.
JDENET Listen Port	This is the port on which the JDENET communications protocol communicates with the JD Edwards EnterpriseOne Enterprise Server. The value is dependent on the release of JD Edwards EnterpriseOne.

Field	Description
	For JD Edwards EnterpriseOne *Release 9.2* , the value is *6017* .
Default Login	Defines how shortcuts to a web form are generated by the system code. Values are either a reserved value or an explicit servlet name. Reserved values are: o **Standard** The URL generated will point to a servlet on the Primary HTML Web Server. o **Redirector** The URL generated will point to redirector in the Primary HTML Web Server, and redirector will point to a servlet on another HTML Web Server for load balancing. The servlet name to use is generated by the system. o **Explicit Servlet Name** The user can specify an explicit servlet name in this field. In this case, the redirector functionality cannot be used. The URL generated will point to the specified servlet in the Primary HTML Web Server. Usage of this value is for backward compatibility only. You should not use it unless you have a direct need.
Installation Path	Enter the installation directory path to which you are installing *Release 9.2* on your HTML Web Server. Make sure this is specific to your version of the release, and also the platform and application server on which your HTML Web Server is running. For default paths, refer to the applicable platform- and application server-dependent version of the *JD Edwards EnterpriseOne HTML Web Server Reference Guide* (*JD Edwards EnterpriseOne Transaction Server Reference Guide for IBM i using WebSphere*). Otherwise, you must obtain this value from the HTML Web Server machine itself, or its administrator.

4. Click the **OK** button.
5. To add another HTML Web Server, click the **Yes** button and repeat steps 1 through 4 to define another HTML Web Server.

Entering Data Server Information

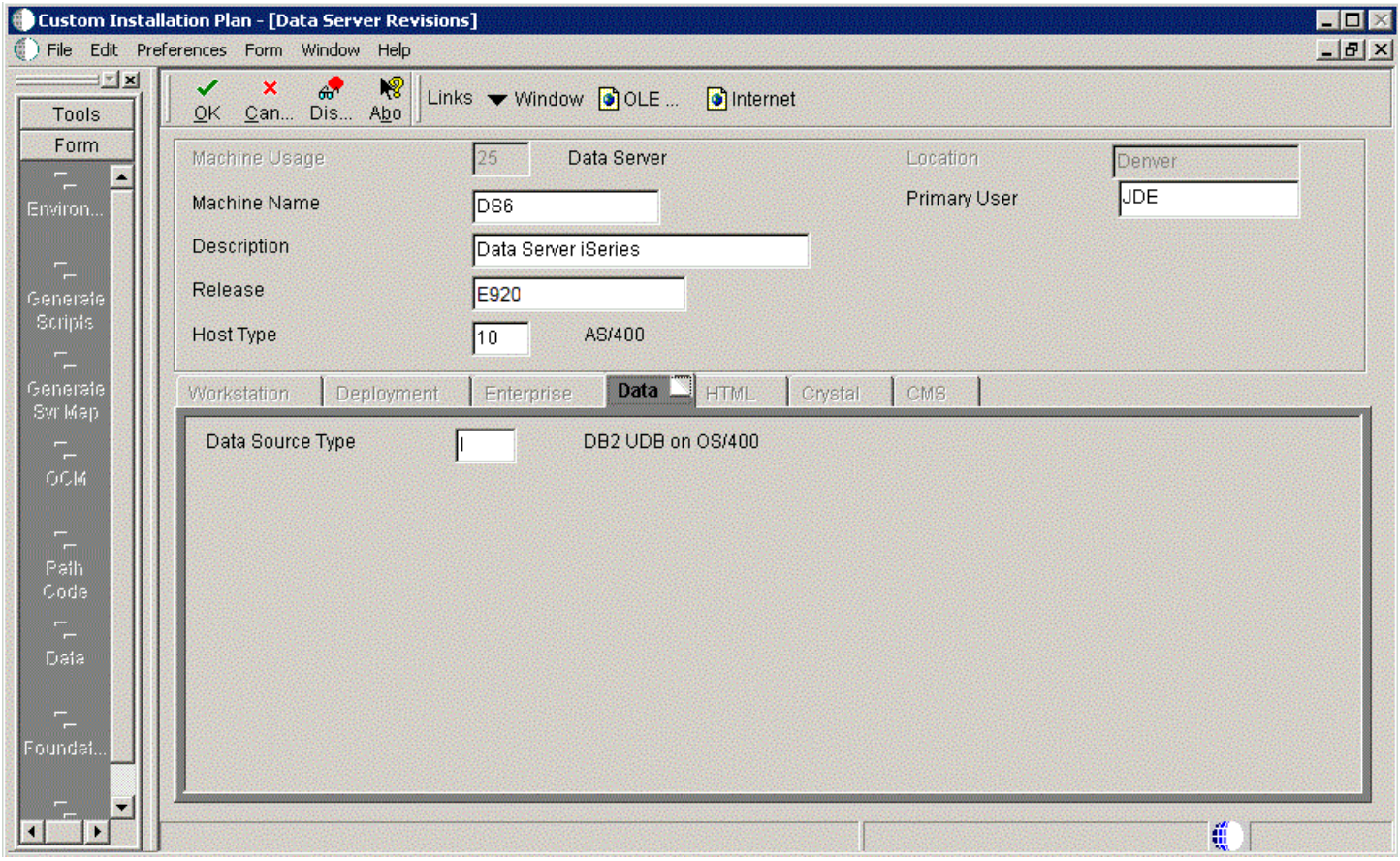


1. On Data Server, choose one of these options:
   - **OK**

     If your database resides on a separate server, choose click the **OK** button to continue entering unique Data Server information.
   - **Select**

     Choose this option to select an existing Data Server.
   - **Skip**

     Choose this option if you do not want to define a 6Data Server. Continue with the Planner using the environment selection in step of this task.



2. On Data Server Revisions, complete these fields:

Field	Description
Machine Usage	The default value of 25 indicates that this is a Database Server.

Field	Description
Machine Name	Enter the name of the Database Server where your central objects reside. If you are using the *IBM i* to store your central objects, enter the name of this server. The name is case sensitive, should not exceed 15 characters, and should not contain any special characters.
Description	Enter a description of the Database Server machine.
Release	Enter the release number you are installing, for example, *E920* .
Host Type	Select the type of Database Server that you are adding to the plan. Values are: o *10* — IBM i o *25* — Sun Solaris o *30* — RS/6000 o *35* — Linux o *50* — Microsoft Windows (Intel) o *80* — Client - Microsoft Windows o *90* — Client - Microsoft Windows
Location	The Installation Planner populates this field by default, based on previous selections.
Primary User	The user to whom an email is sent once a package is deployed. The default for Primary User is JDE.

3. On the **Data** tab, complete the following field:

Field	Description
Data Source Type	Choose the type of data source. For example: o **I - *IBM i***

4. Click the **OK** button.
5. To add another Data Server, click the **Yes** button and repeat steps 1 through 4 to define another Data Server.
6. On Data Source, click the **OK** button to continue entering unique shared data source information, or click the **Take Defaults** button to select the default data for the shared data sources.
7. On Location, select the **Yes** button to add another location, or click the **No** button to continue with Installation Planner.

Entering Shared Data Source Information

To enter or confirm information for data sources that are shared across all of your environments, complete the following tasks:

- *Specifying (Custom or Default) Shared Data Source setup information*
- *Verifying the Data Source for Data Dictionary*
- *Verifying the Object Librarian Data Source*
- *Verifying the Data Source*
- *Verifying the System Data Source*

Specifying (Custom or Default) Shared Data Source setup information

Release 9.2 prompts you for the data source information for the shared data sources. Choose one of the following options:

- To use the *Release 9.2* data sources, click the **Take Defaults** button.

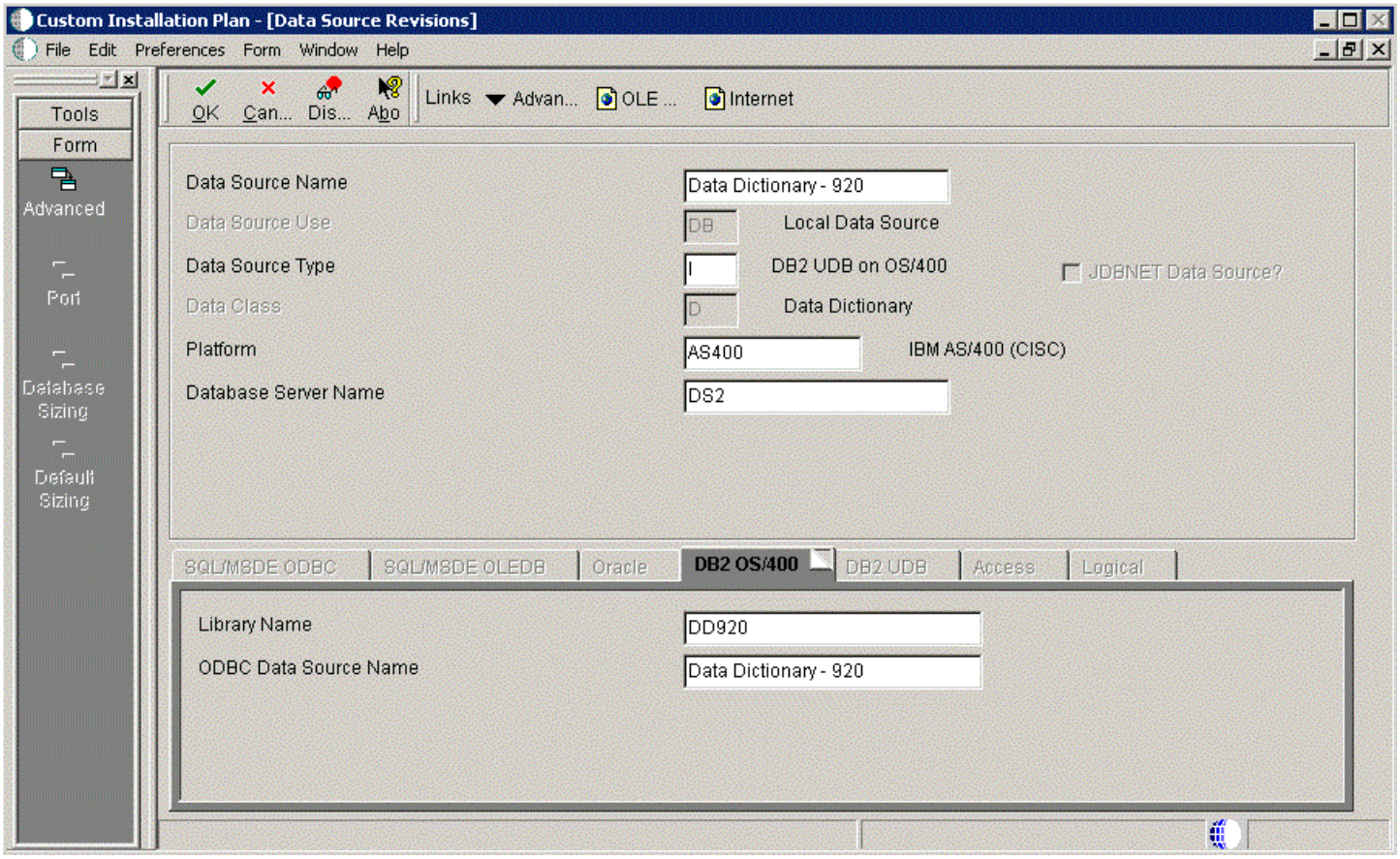
  Continue with *Setting Up Environments*.

  > **Note:** This option limits your customization choices.

- Click the **OK** button to enter the data sources. Verify the data source information.

Verifying the Data Source for Data Dictionary

To verify the data source for Data Dictionary:

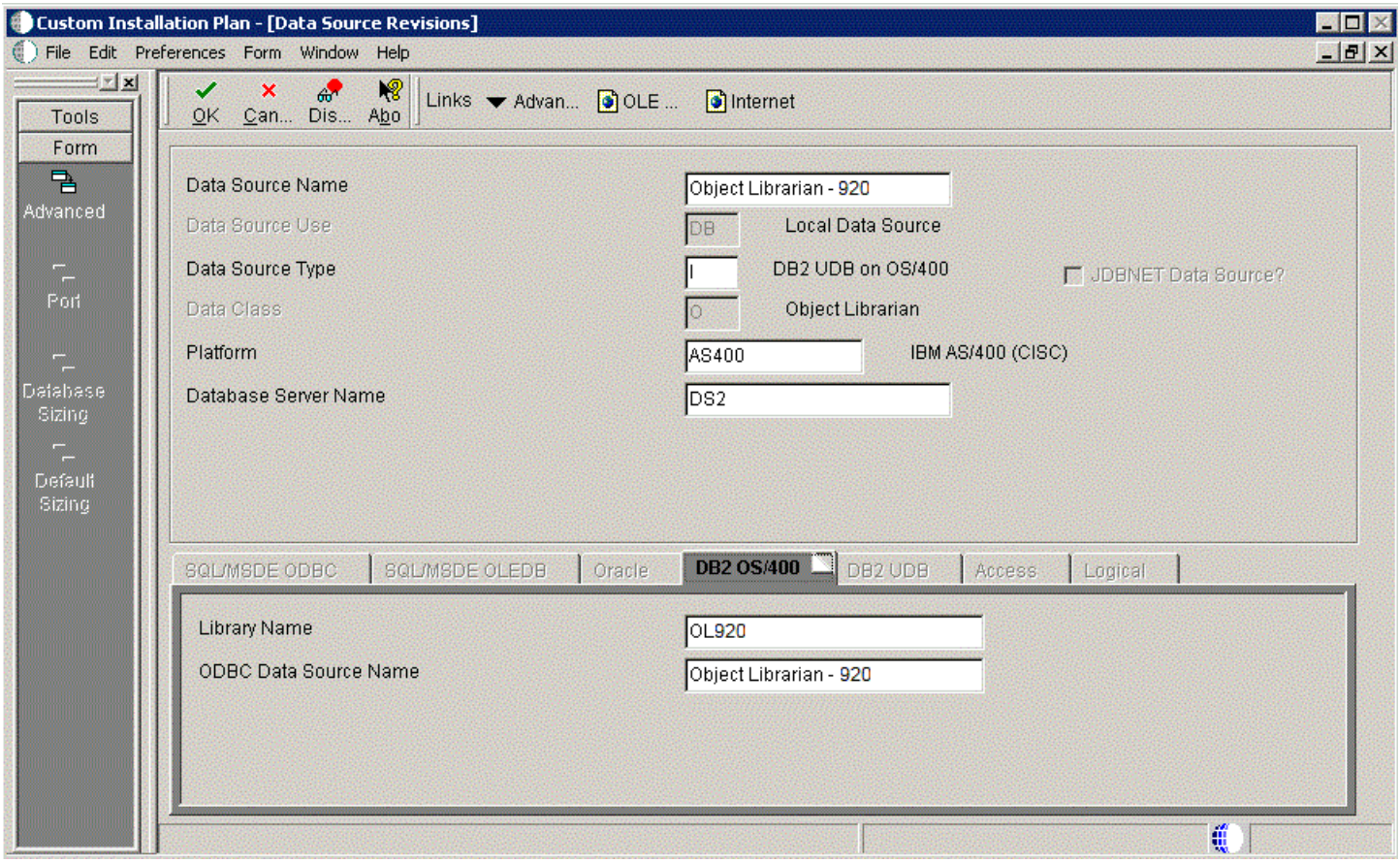


1. On Data Source Revisions, verify the accuracy of the settings for the Data Dictionary data source.

   The library name in the Library Name field is the *Release 9.2* data dictionary library (*DD920*).
2. Click the **OK** button.

Verifying the Object Librarian Data Source

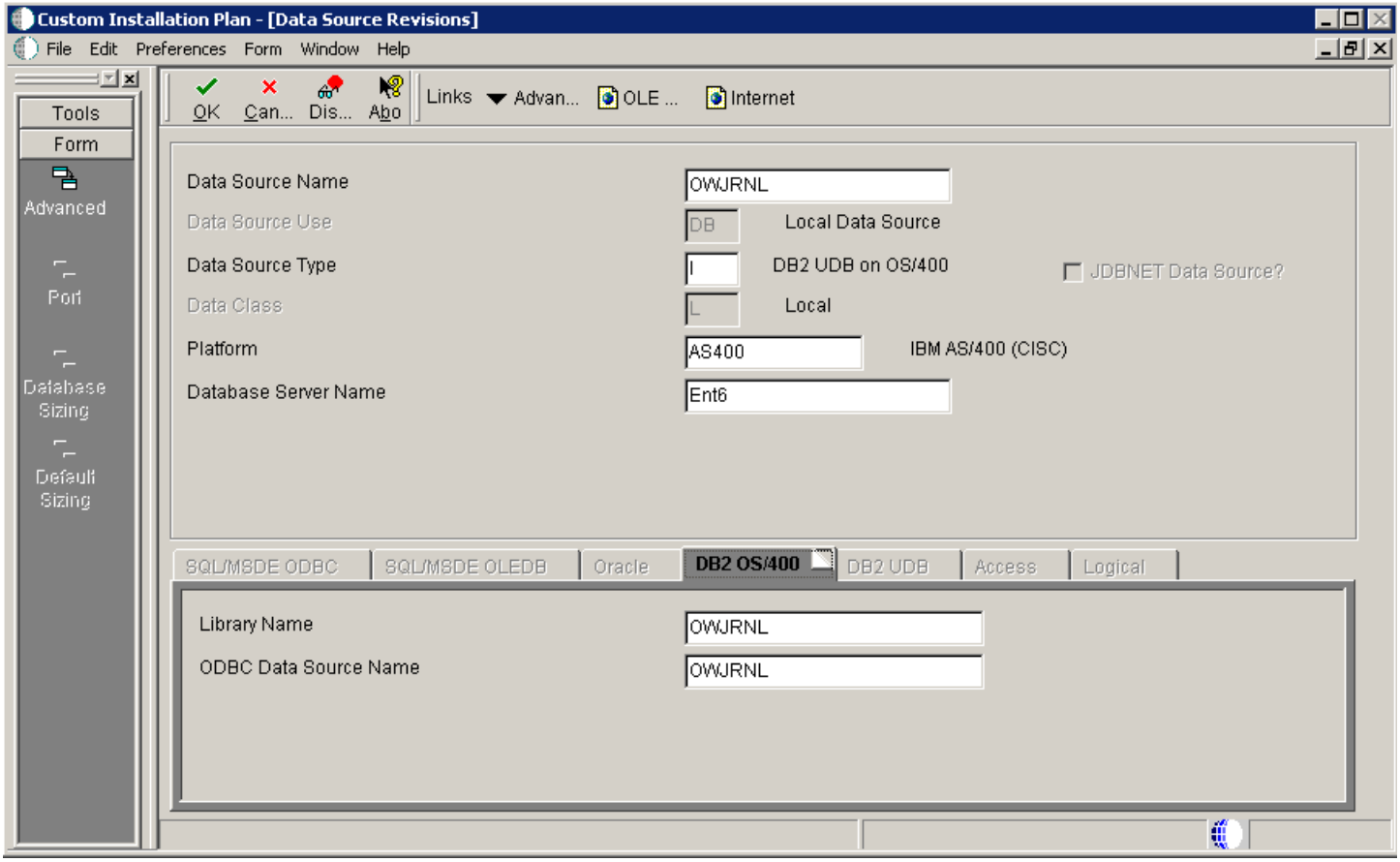
To verify the Object Librarian data source:



1. On Data Source Revisions, verify the accuracy of the settings for the Object Librarian data source.
2. Click the **OK** button.

Verifying the Data Source

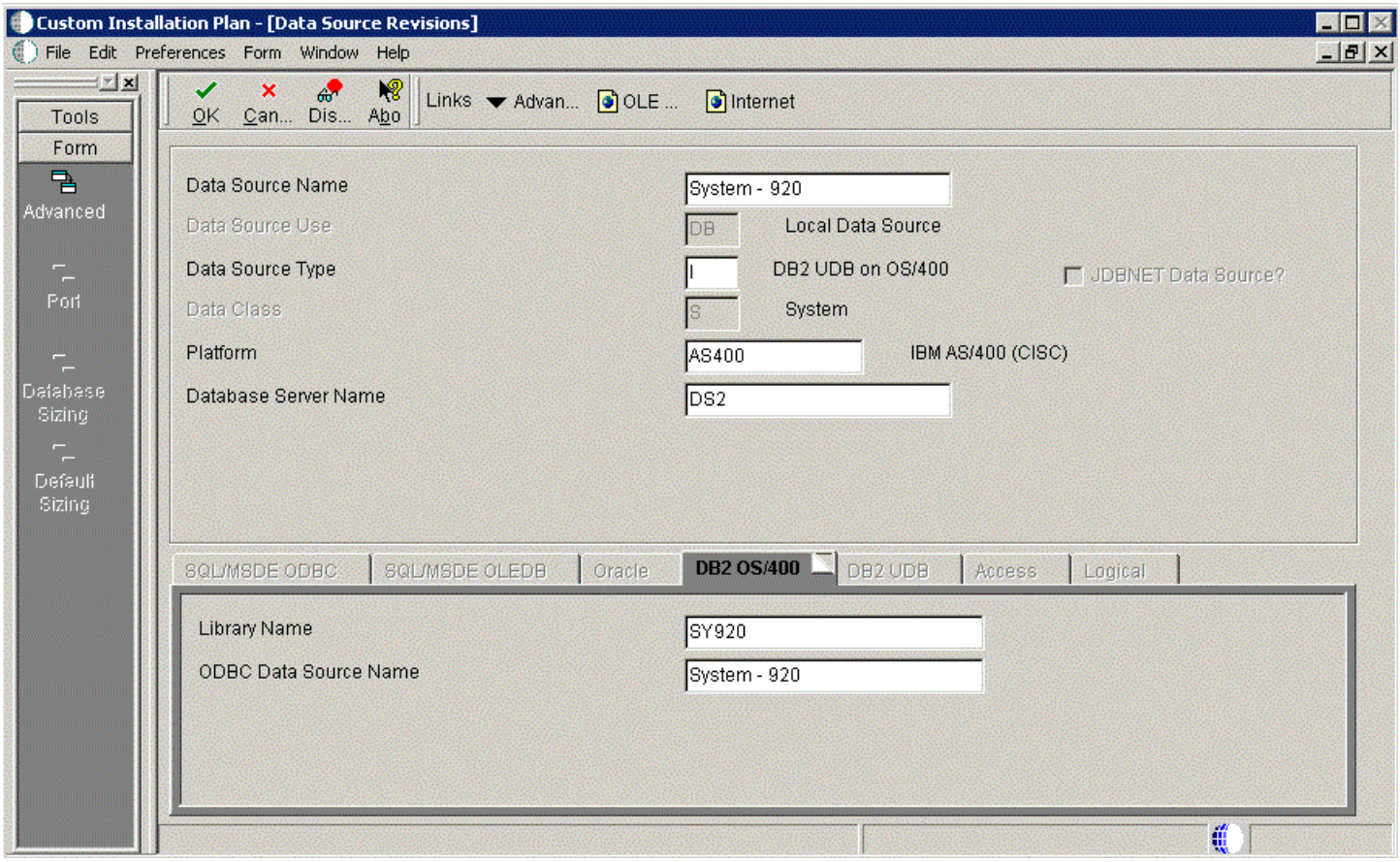
To verify the *OWJRNL* data source:



1. On Data Source Setup, verify the accuracy of the *OWJRNL* data source.
2. Click the **OK** button.

Verifying the System Data Source

To verify the System data source:



1. On Data Source Setup, verify the accuracy of the settings for the System data source.

2. Click the **OK** button.

   The Environment Selection screen appears.

See Also

For more information about System data source fields or fields for other data sources mentioned in this process, refer to Chapter 23, "Understanding Data Source Charts".

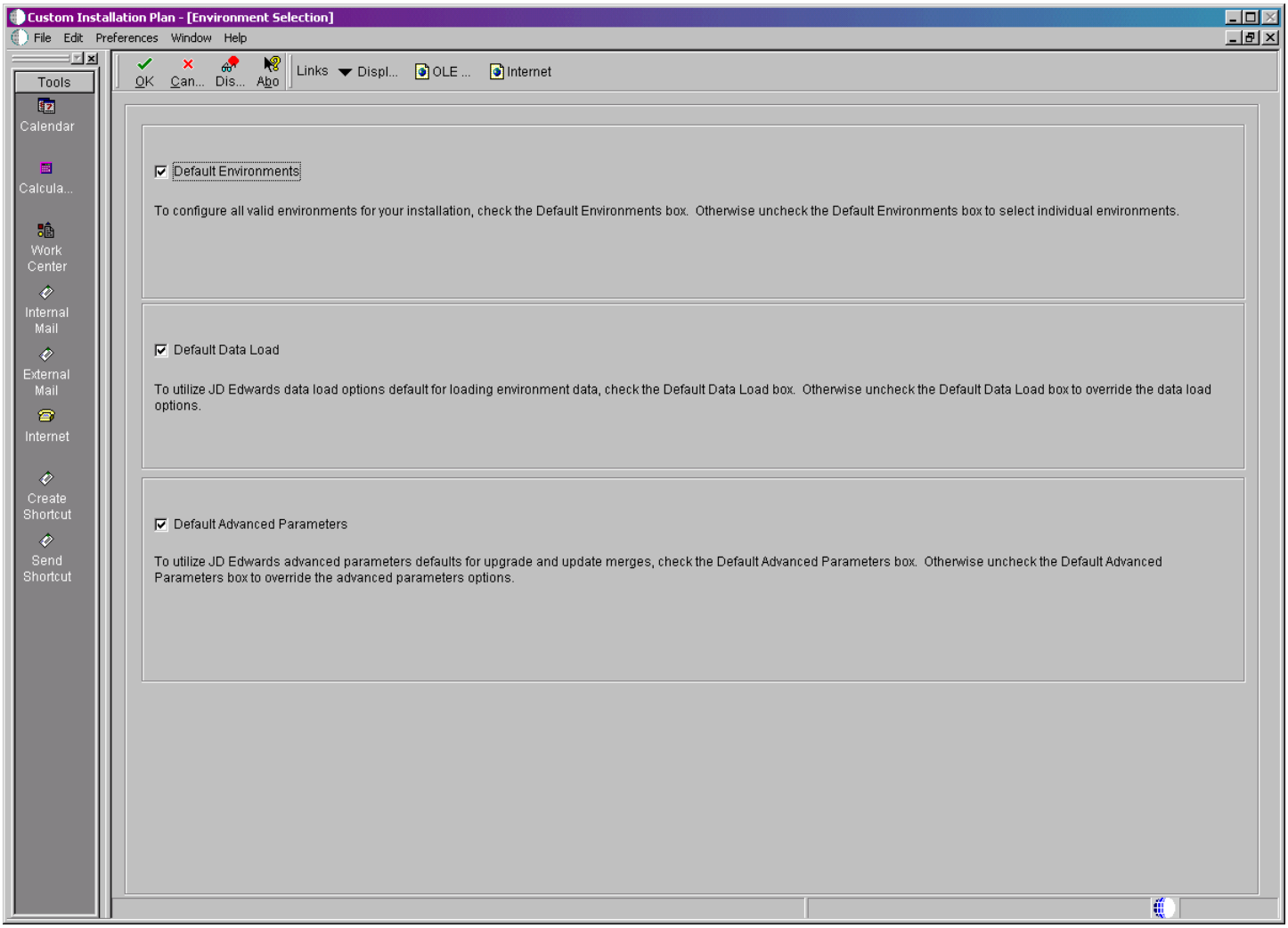
Setting Up Environments

By default, *Release 9.2* configures your system using values for typical environments. Depending on the options chosen when you set up your plan, *Release 9.2* displays one or more of the following parameters, which you can customize in the following tasks:

- Environments
- Data Load Options
- Advanced Parameters
- Languages

You can customize any of these parameters by turning off the default option on the Environment Selection form. As you move through the plan, *Release 9.2* will display a customization form for each parameter that you turn off.

> **Note:** : The default for the PD920 environment is to **not** run the Specifications Merge. The best practice is to upgrade PY920, apply all Customizations and Modifications there, and copy the PY920 Central Objects to PD920. If you want to run Specifications Merge for PD920, uncheck the Advanced Parameters, and when the Advanced Parameters form displays, enable the checkbox for Spec Merge.



1. On Environment Selection, turn off the options for those parameters that you want to customize.

> **Note:** The parameters that display might vary depending on which options you chose at the beginning of the planning process.

2. Click the **OK** button.

> **Note:** If you checked the default option for all parameters, skip to *Setting Up Environment Data Sources*.

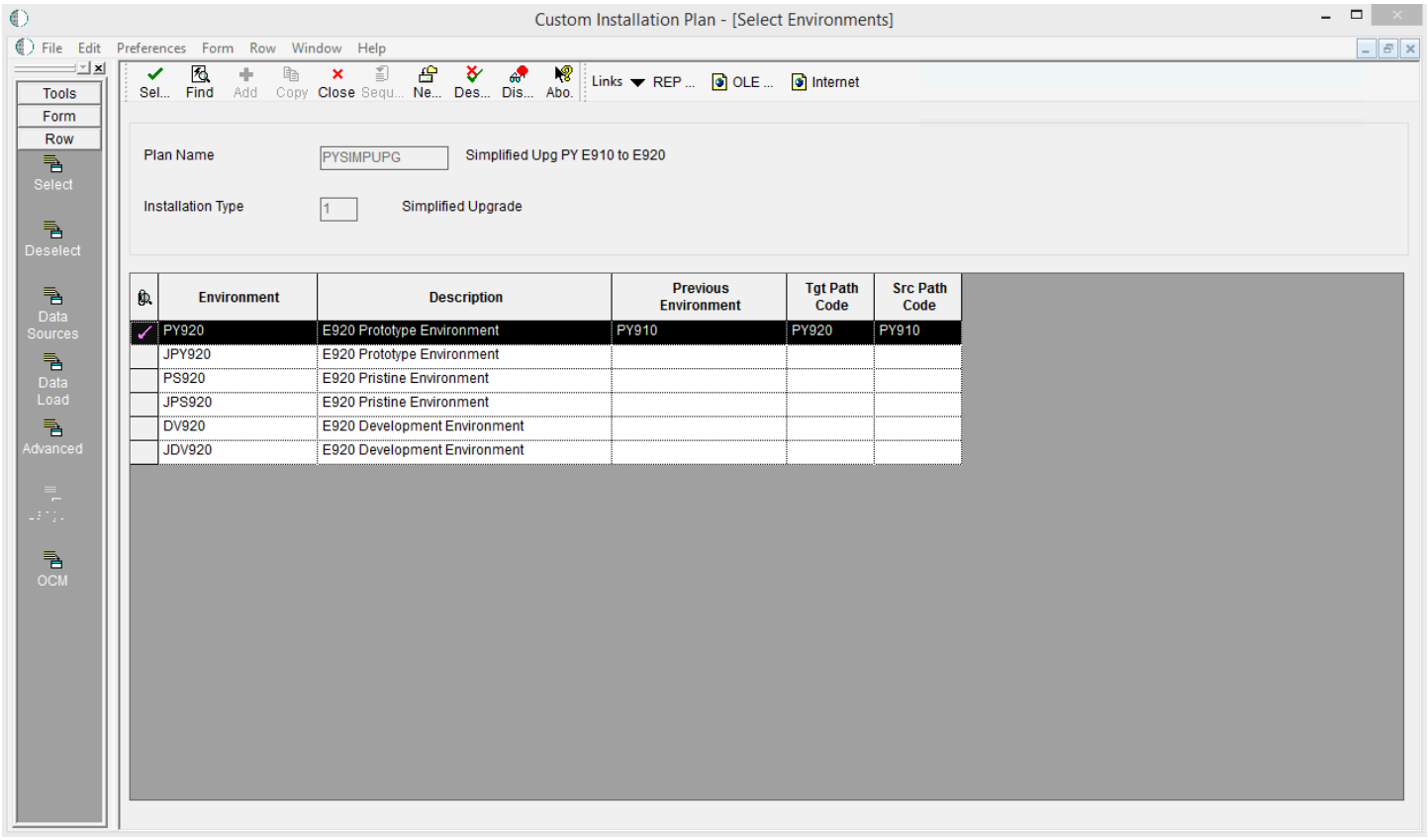
Use the following tasks to customize each of the parameters listed above. *Release 9.2* displays customization forms only for those parameters for which were turned off the default options. Skip the tasks for those parameters that were left turned on.

3. Continue with the following relevant tasks:
    - *Selecting an Environment*
    - *Specifying Environment Data Load Parameters*
    - *Verifying Advanced Parameters*
    - *Selecting Languages (optional)*

Selecting an Environment

The Select Environment form appears.

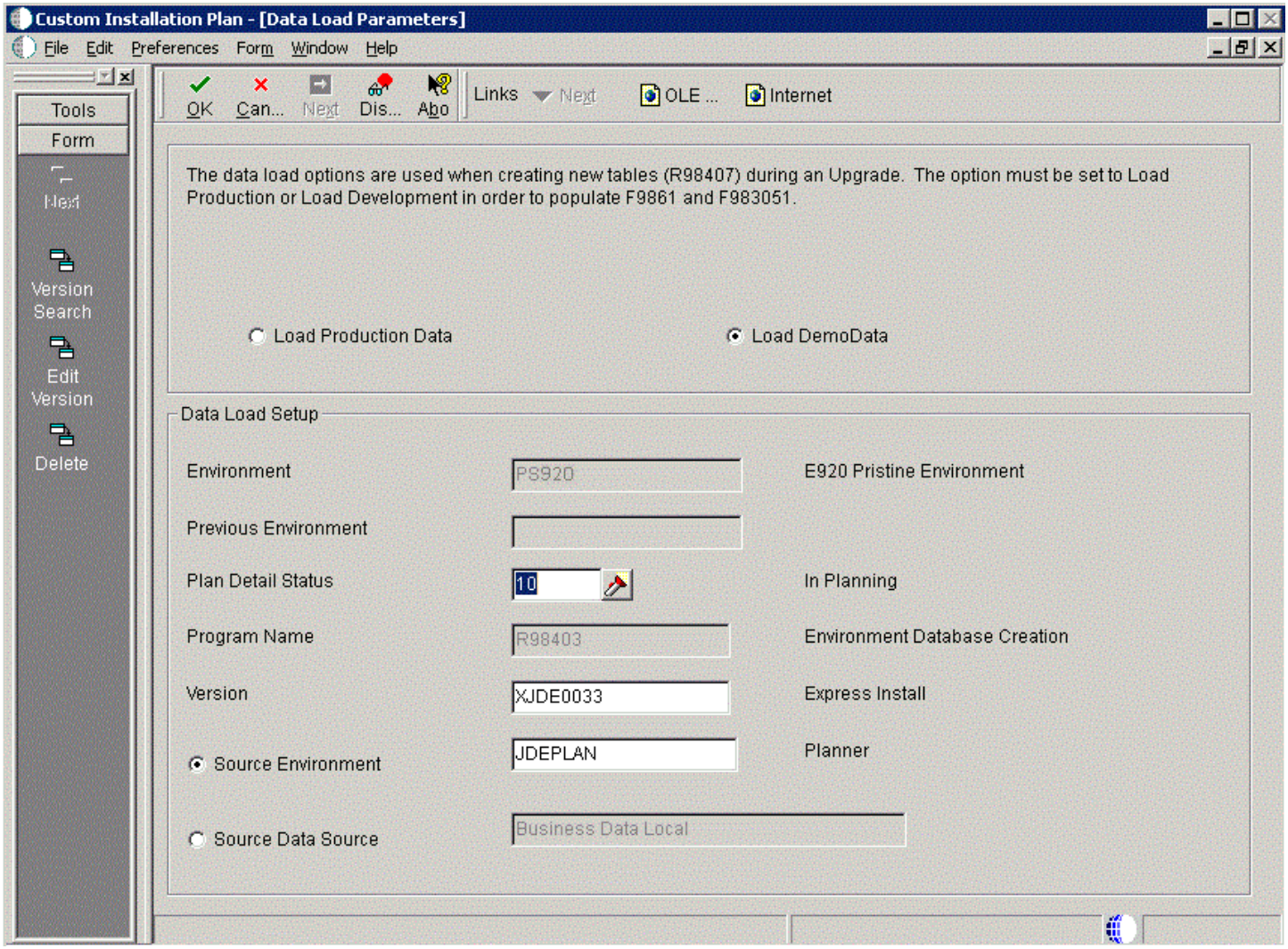
> **Note:** Environments prefixed with J*xx* are required for the *HTML Web Server* .



1. On **Select Environments**, double-click the environment that you want to define.
2. To set up multiple environments, choose and define them one at a time. *Release 9.2* returns to this screen after the following tasks are completed.
3. Click the **Close** button to exit the Select Environments screen.

Specifying Environment Data Load Parameters

If you turned off Default Data Load on the Environment Selection form, the Data Load Parameters form appears.

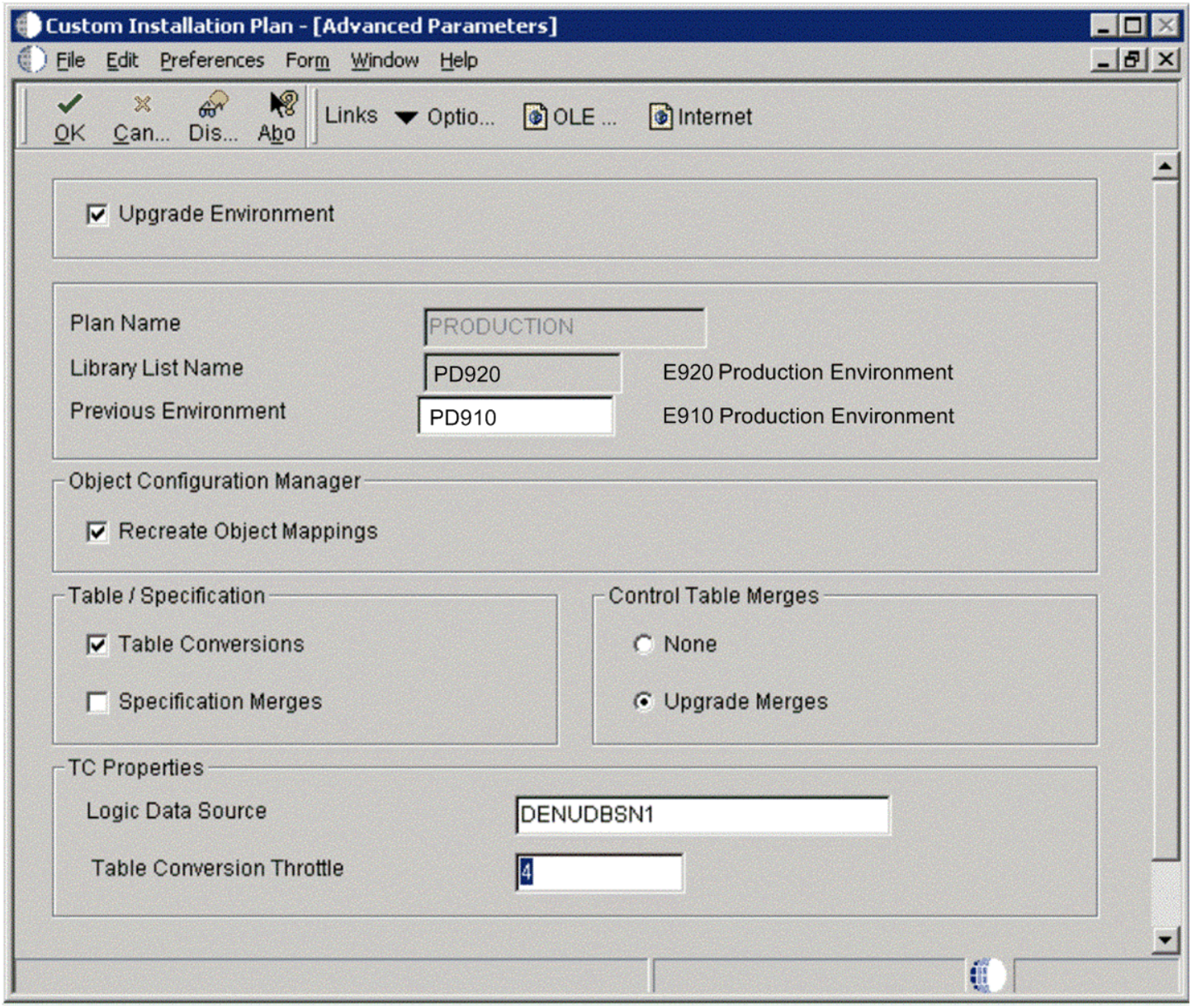


Note: The data load radio buttons on this form are no longer applicable as of *JD Edwards EnterpriseOne* Release *9.1* because data is automatically loaded by the Platform Pack Installer. For additional details, refer to *Loading Data (Demo Data and Production Data)*.

Verifying Advanced Parameters

If you turned off Default Advanced Parameters on the Environment selection form, the Advanced Parameters form appears.

To verify advanced parameters:



1. On Advanced Parameters, complete the following fields and turn on the following options:

Field	Description
Logic Data Source	The server data source where the table conversions will run
Table Conversion Throttle	The number of table conversions to be run concurrently on the server

Note: For the PD920 environment, by default the **Specifications Merge** checkbox is **not** enabled. If you want to run the Specifications Merge for this environment, you must enable the **Specifications Merge** checkbox.

Note: The Table Conversion Workbench checks the maximum jobs for the default job queue for the logic server. It will only submit up to the number of maximum jobs on the queue to run at once. If the throttle is set higher than the queue, it uses the queue maximum number of jobs. If the queue is set higher than the throttle, it uses the throttle.

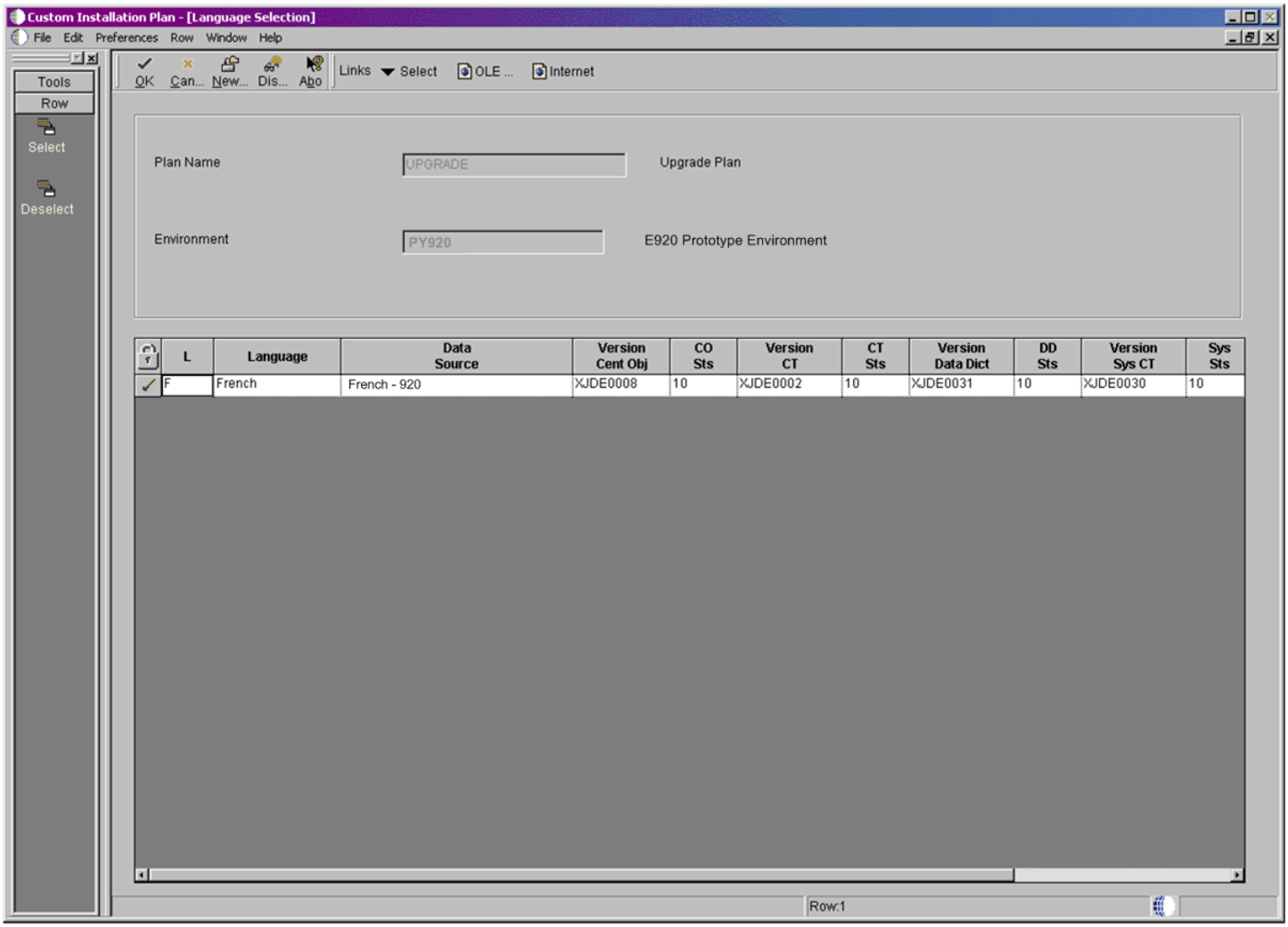
2. Click the **OK** button.

   If you turned off Default Languages on the **Select Environments selection** form, continue with *Selecting Languages (optional)*.

   If you are not installing languages, *Release 9.2* prompts you for data source information. Skip to *Setting Up Environment Data Sources*.

Selecting Languages (optional)

To select languages:



1. On Language Selection, to set up a language for the selected environment, choose the appropriate language.

2. From the Row menu, click the **Select** button.
3. Repeat the above steps until all your languages have been selected.
4. Click the **OK** button.

> **Note: Customization Considerations.** If you have customizations that you do not want to merge, you can prevent individual conversions and merges from running by changing their status or deleting the appropriate records from the plan before you run the Installation Workbench.

Setting Up Environment Data Sources

Once the Environments have been set up, it is necessary to set up the Data Sources for those Environments. If you created a custom environment, data source information is generated from the data source template provided by *JD Edwards EnterpriseOne* .

See Also

To modify this template, refer to the *JD Edwards EnterpriseOne System Administration Guide* .

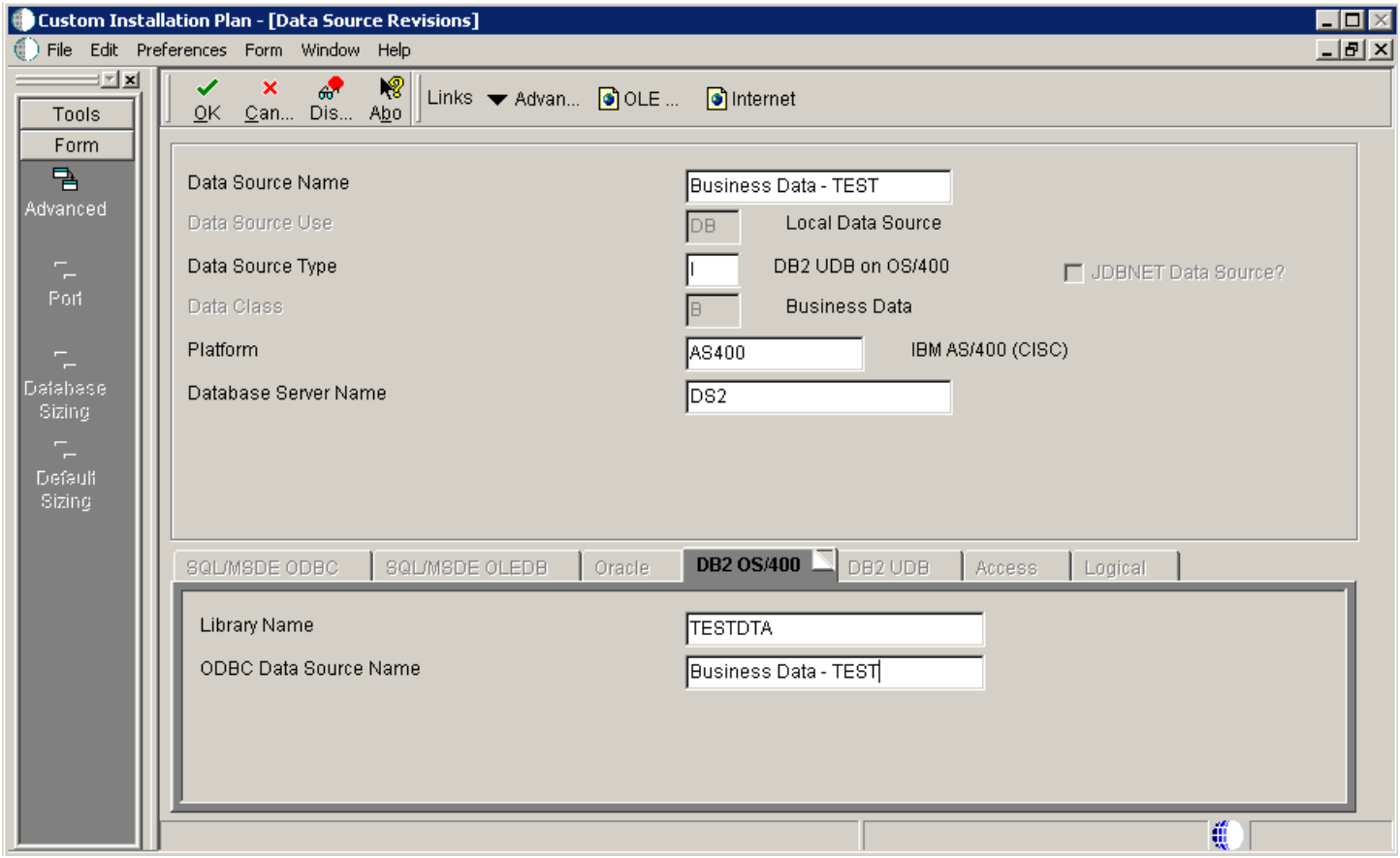
Selecting an Environment Data Source Setup Option

On the Installation Planner prompt that enables you to set up data sources for the environment you just configured:

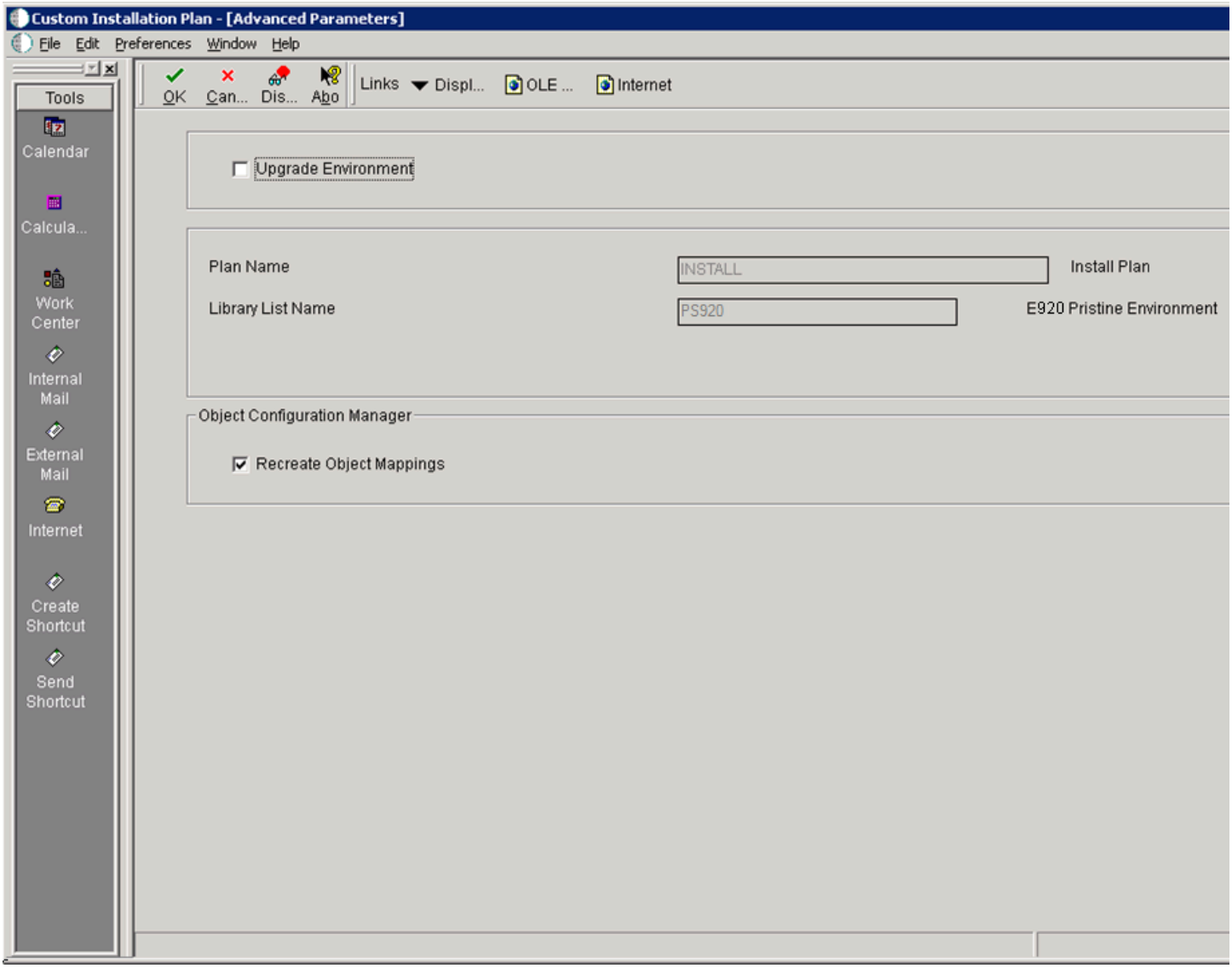
- Click the **OK** button to manually enter the data sources as described in the remaining tasks in this section.
- Click the **Take Defaults** button to accept the *Release 9.2* default data sources.

Setting Up the Data Source for Business Data

To set up the Business Data data source:



1. From the Form menu, click the **Advanced** form exit.



2. On Advanced Parameters, verify the settings and click the **OK** button.

3. On Data Source Revisions, verify the data source for your Business Data.

   Be sure this data source points either to the existing production data source you want to upgrade or to a copy of it.

   Note: Business Data data sources are specific to the environment and pathcode.

4. When you ran Copy Plan, some fields were changed to reflect the previous release values. Change the following fields:

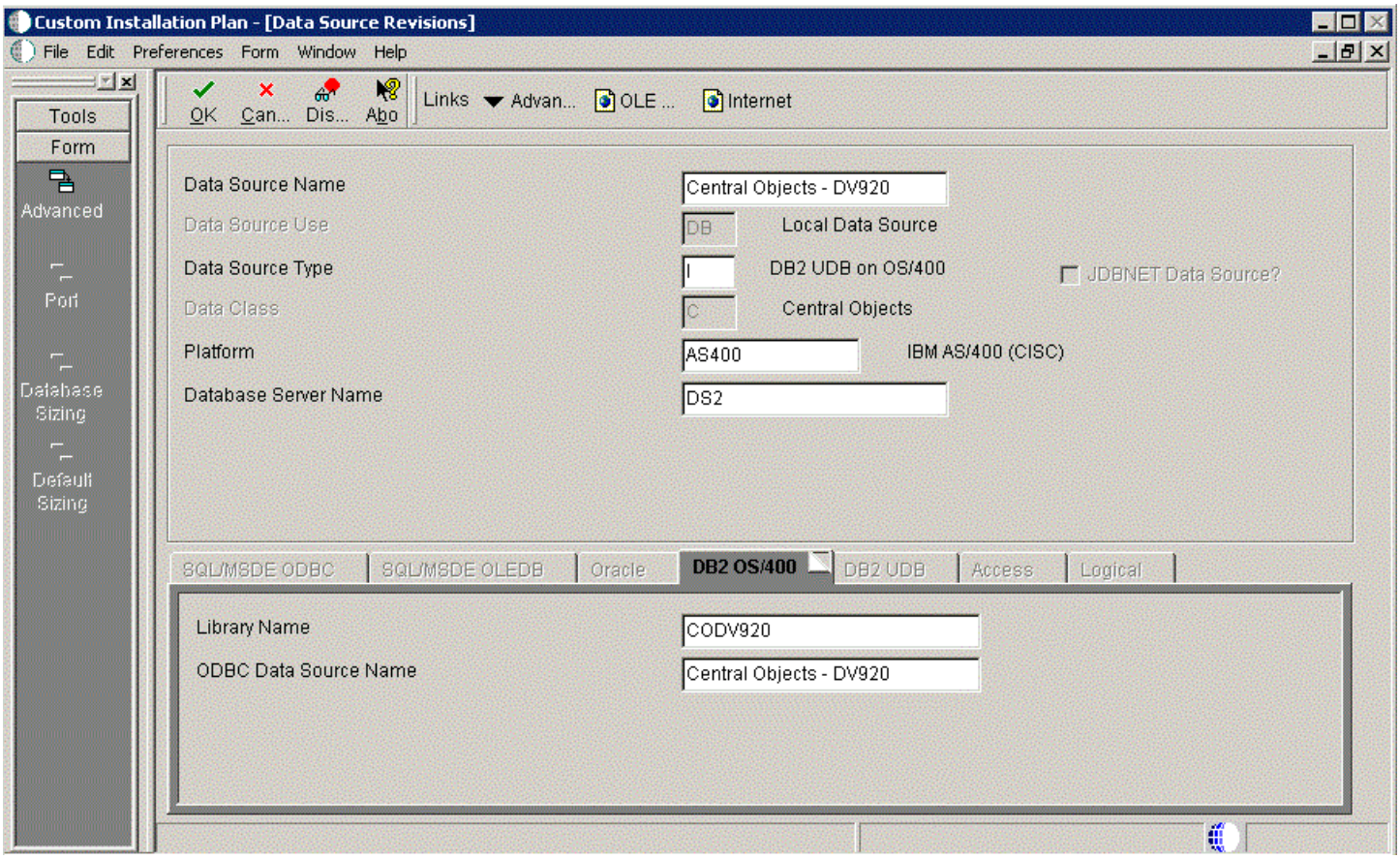
Field	Description
Data Source Type	Enter **I** for IBM iSeries Access.
iSeries Database Name	Enter the name of the data source. For example, Business Data - TEST.

5. Click the **OK** button.

Setting Up the Data Source for Central Objects

CAUTION: You should change the data source if Central Objects are not on an *IBM i* machine.

To set up the Central Objects data source:

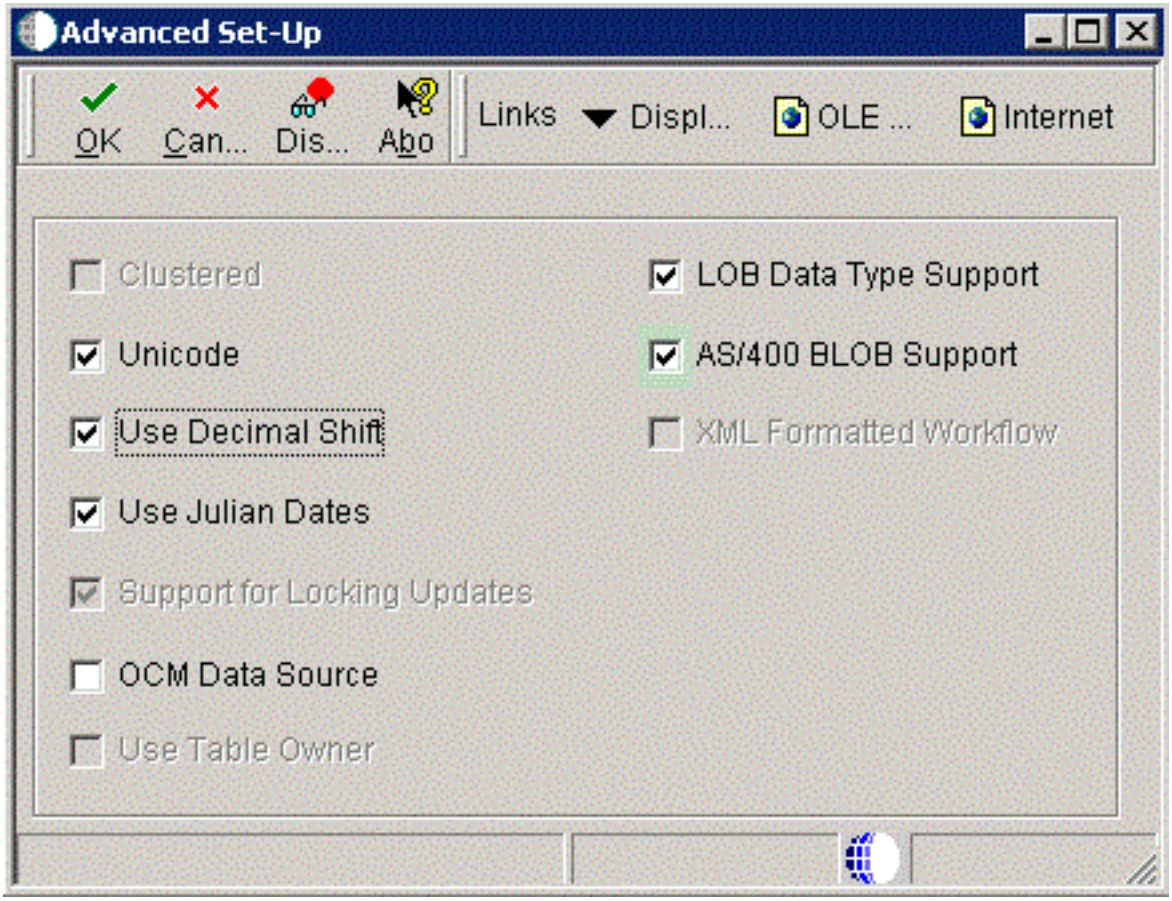


1. On Data Source Setup, verify the information for your Central Objects data source.

2. Click the **OK** button.

   Verify that your Central Objects data source is Central Objects - <Path Code>.

   Note: Central Objects data sources are specific to the pathcode.

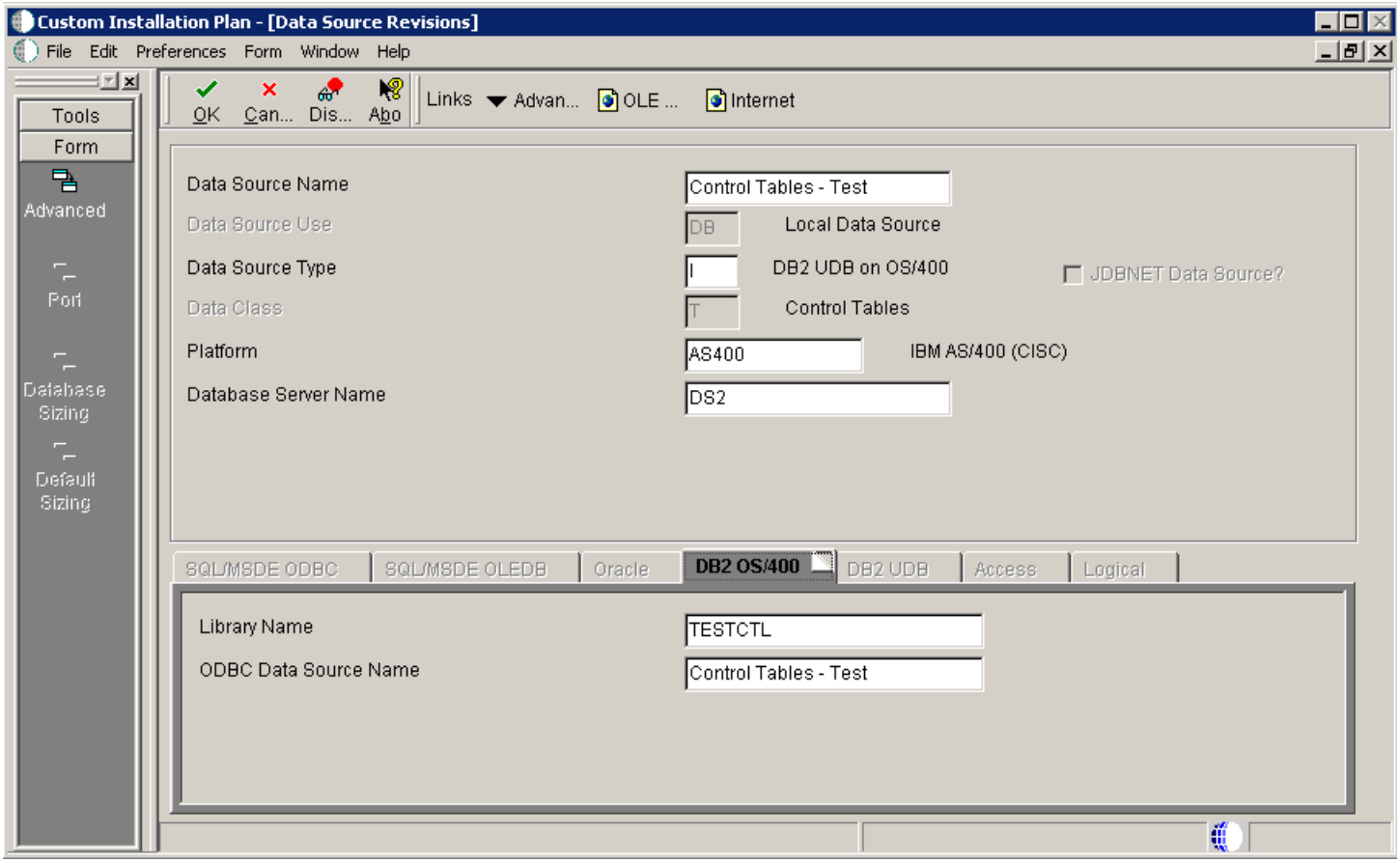


3. On Advanced Set-Up, because the central objects data source must be Unicode, verify the **Unicode** setting is checked.

   For *IBM i* , ensure the **AS/400 BLOB Support** setting is checked.

Setting Up the Data Source for Control Tables

To set up the Control Tables data source:



1. On Data Source Revisions, verify the accuracy of the Control Tables data source.

Field	Description
Data Source Name	Verify the name of the data source.
Server Name	Verify the name of the Enterprise Server. When you defined your plan, some fields were changed to reflect the previous release values. Verify the values for Data Source and Database type are set as follows: **I** for IBM iSeries Access
Library Name	Enter the name of the library housing your Control Tables for the selected environment.
ODBC Data Source Name	Enter the name of the data source. For example, Control Tables - Test.

Note: Control Tables data sources are specific to the environment and pathcode.

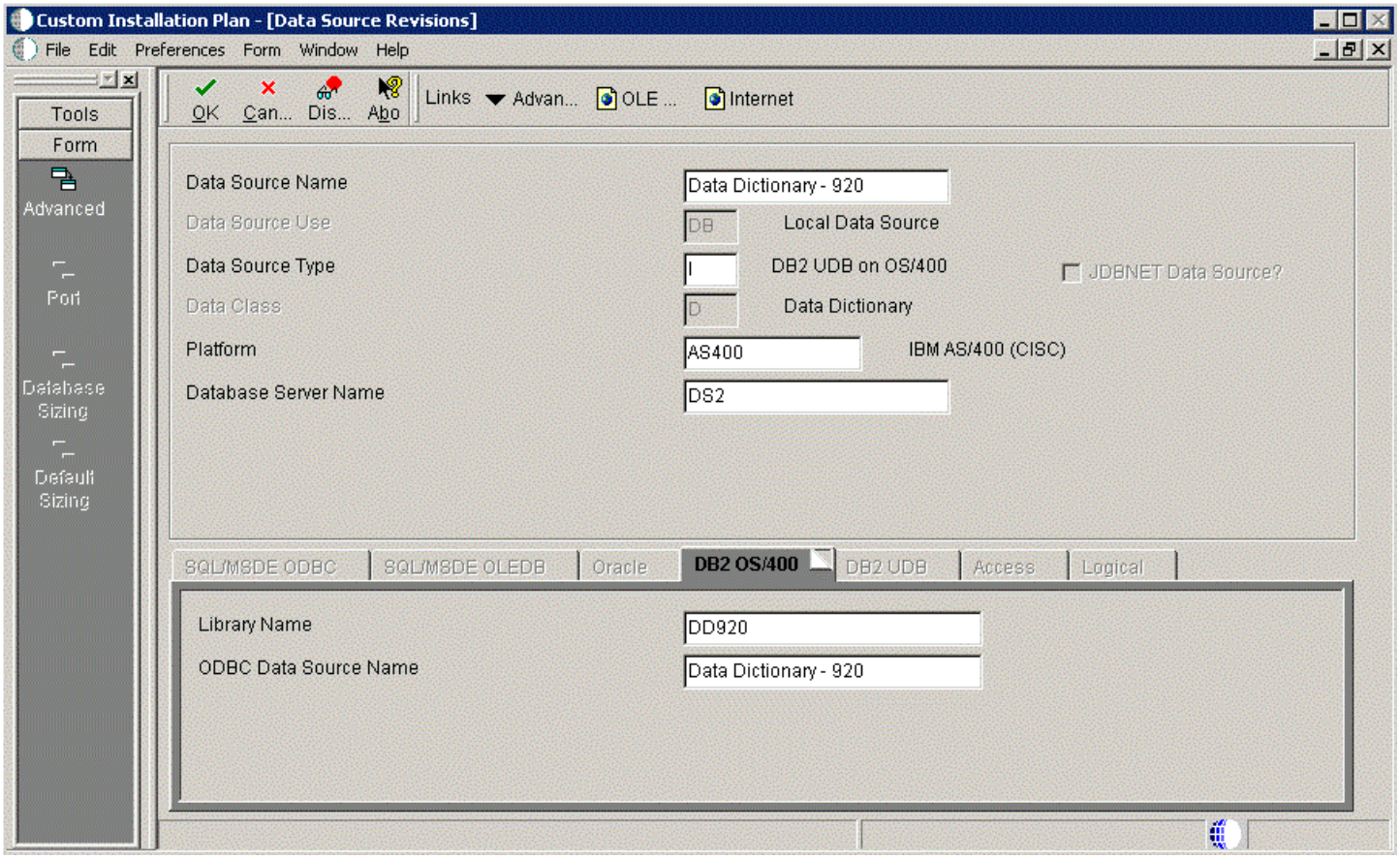
2. Click the **Advanced** form exit and verify that UNICODE is off only if the Control Tables are not set to Unicode in a previous release.

   Note: If you upgrade from Release 8.9 and upwards the Unicode flag is on.

3. Click the **OK** button.

Verifying the Data Dictionary Data Source

To verify the Data Dictionary data source:

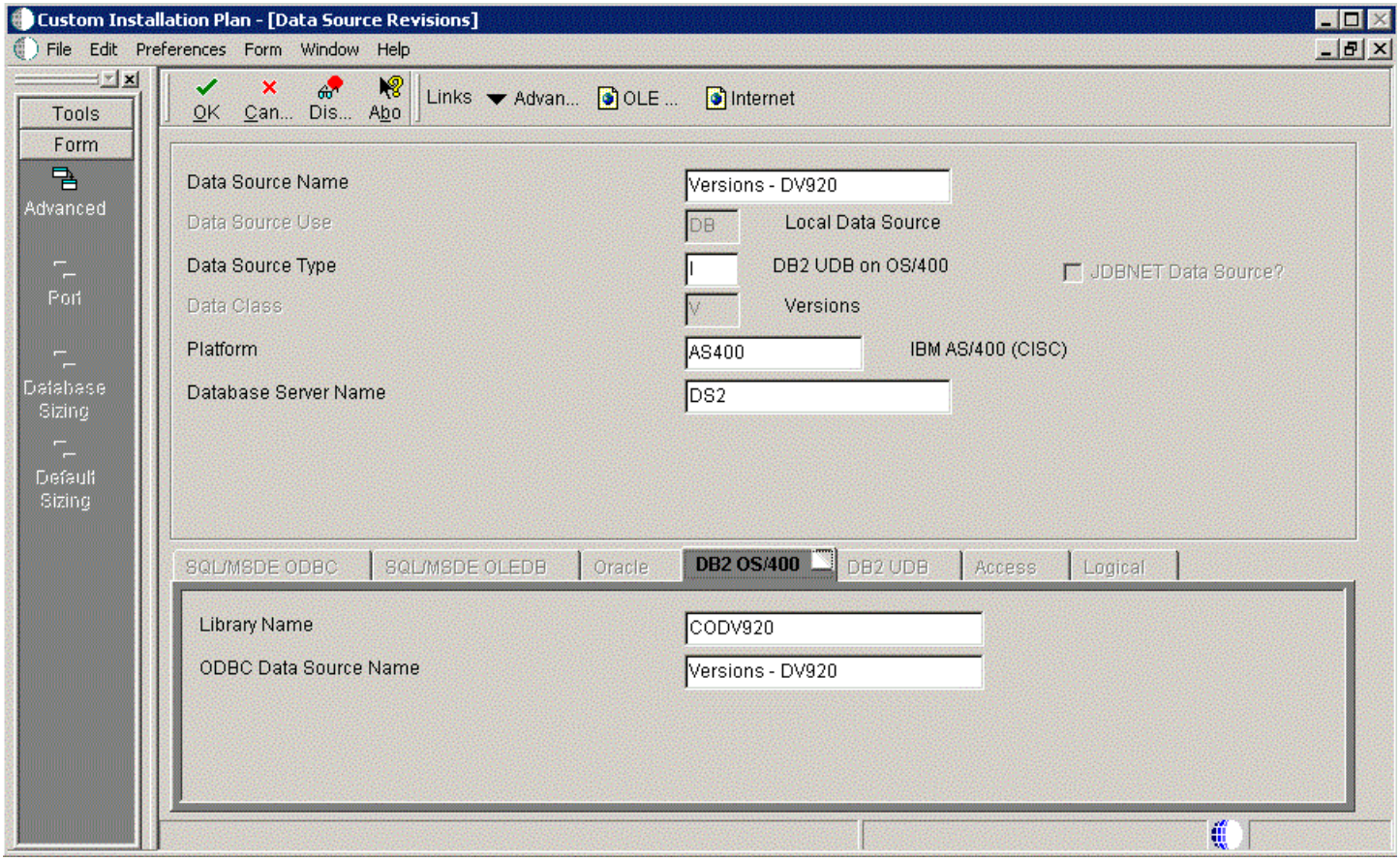


1. On Data Source Setup, verify the accuracy of the Data Dictionary data source.

   The library name in the **Library Name** field is the *Release 9.2* data dictionary library (*DD920*).
2. Click the **OK** button.

Verifying the Data Source for Versions

To verify the Versions data source:



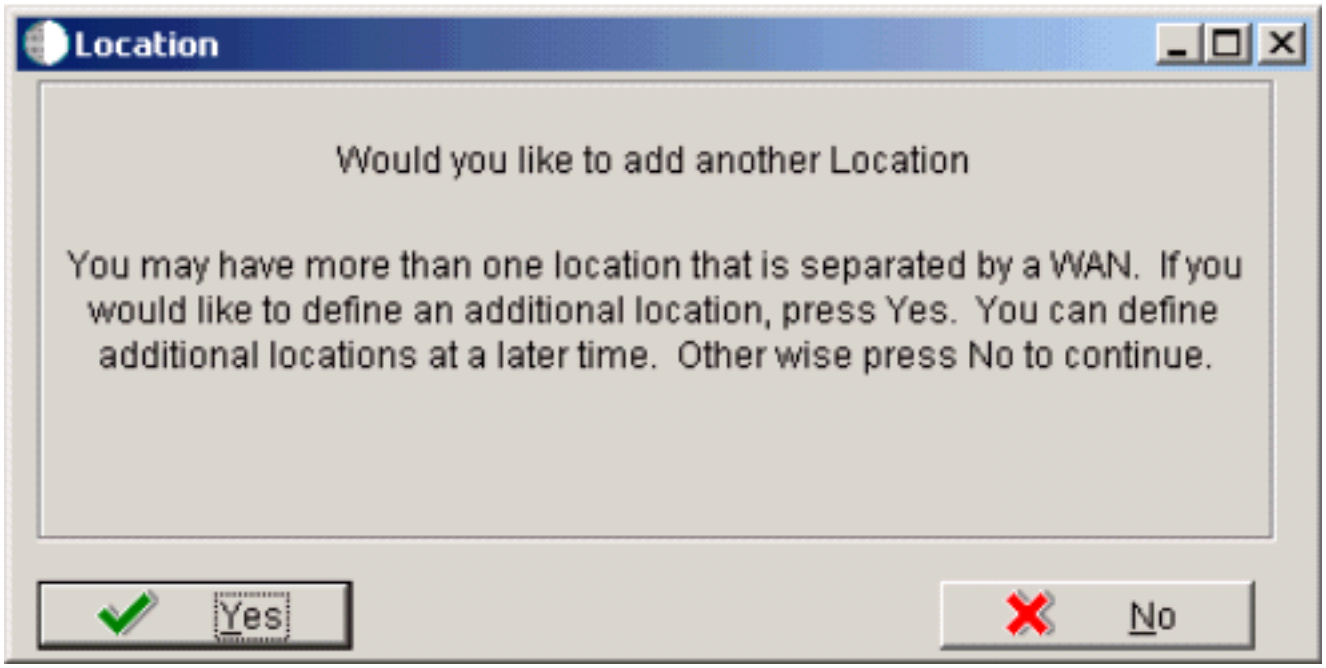
1. On Data Source Revisions, verify the accuracy of the Versions data source.

2. Click the **OK** button.

> **Note:** Versions data sources are specific to the pathcode, and the Unicode flag on the Advanced Form must be checked.

Adding a Remote Location

To add remote location:



Release 9.2 asks if you want to add another (remote) location.

1. On Location, choose one of the following options:

   - Click the **Yes** button to add a remote location.

   Repeat all processes for adding a location starting with *Entering Location Information*. Refer to the Creating a Remote Installation Plan task in the Installation Planner Utilities section for information about adding remote locations to your plan.

   - Click the **No** button to conclude the Installation Plan setup.

2. Continue with *Finalizing the Installation Plan* task.

Finalizing the Installation Plan

To finish the Installation Plan.

1. A message appears to let you know that the installation plan has been finalized.

   When the plan is finalized:

   - The status is set to 20, which signals that several adjustments to tables were made according to your plan.
   - Create the OCM.
   - Modify the jde.ini file.
   - The following tables are upgraded:

     Release Master table (F00945)

     Path Code Master table (F00942)

     Package Plan table (F98404)

     Machine Detail table (F9651)

     Language table (F984031), if you are installing an alternate language.
2. Click the **OK** button to exit the concluding message box and initiate the Planner Validation Report.

   - If processing option default was chosen, Planner Validation Report automatically prompts you to run this report.
   - If processing option default was not chosen, on the tree view of your plan, click the **Validate** button to initiate the Planner Validation Report.

Concluding the Validation Planner Report

To conclude the validation planner report:

1. On Report Output Destination, choose **On Screen** or **To Printer**, and click the **OK** button.
2. Review the report to confirm that all records were validated.
3. After reviewing the report, on the Batch Versions form, click the **Close** button.

   For more information about *Installation Planner Validation Report (R9840B)*, refer to *Working with Reports*.
4. On Work with Installation Plans, click the **Expand** button to review the plan you created.

See Also

- A separate chapter in this guide entitled: *Creating a Remote Installation Plan*
- A separate chapter in this guide entitled: *Adding a Server to an Existing Configuration*
- A separate chapter in this guide entitled: *Creating a Language-Only Installation Plan*

Resetting the jde.ini Prior to Running Table Conversions

If you changed the `jde.ini` on the Enterprise Server at the end of upgrading a previous environment, you will need to change it back before running the upgrade for this environment. Verify this setting:

```
[DB SYSTEM SETTINGS]
SQL Package Library=2
```

If you have any other setting than 2 for the `SQL Package Library` parameter, your Table Conversions will fail.

Clearing SQL Packages from QRECOVERY

You may have one or more packages (Rnnnnn) in QRECOVERY if you are upgrading from JD Edwards ERP 8.9 onwards, and you were running with this setting:

```
[DB SYSTEM SETTINGS]
SQL Package Library=1
```

If these packages exist in QRECOVERY, you could experience problems after the upgrade. However, the problem will not be apparent during the upgrade, because the upgrade installer uses a `jde.ini` with `SQL Package Library=2`.

> **Note:** With the setting `SQL Package Library=2`, the system assigns each job its own unique package (for example, T123456), which is not based on the UBE name.

You should delete any old UBE SQL packages in QRECOVERY.

> **Note:** No UBEs can be running on the server while you are deleting these packages.

To delete the packages, use this command:

```
DLTSQLPKG  QRECOVERY\R*
```

Deleting Machines from an Installation Plan

As you work through the Installation Planner application, you might find that you need to delete a server or machine that you have created. You can use Installation Planner to delete machines as needed; however, doing so can affect related databases, shared Enterprise Servers and Deployment Servers, and associated records.

To delete machines from an installation plan:

1. In the *Release 9.2* planner environment, enter P9654A in the Fast Path field and press Enter.
2. On Work With Locations and Machines, click the **Find** button.
3. Expand the location.

   A list of your locations, machines, or servers appears for the base location in the tree view.
4. Select the location, machine, or server that you want to delete.

5. Click the **Delete** button.
6. To close the application, click the **Close** button.

Verify and Configure Data Source for Previous Release

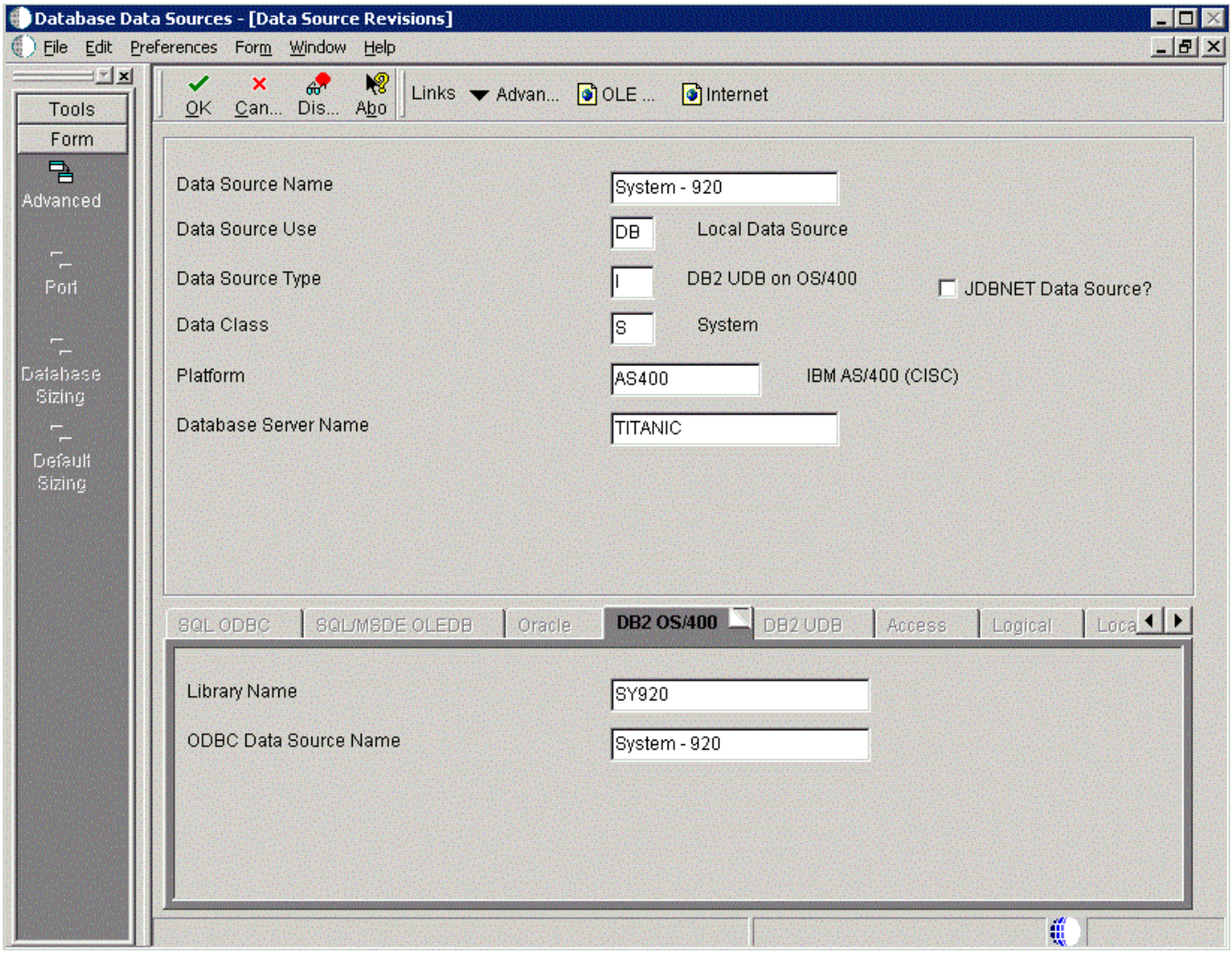
Note: This section is only applicable if you installed your *E920* deployment server a different machine (as the previous release). If you install the *E920* Deployment Server on the same machine (as the previous release), the Installation Planner automatically detects the local System data source and uses it to configure the upgrade.

Before you run the Installation Planner for an upgrade, you must ensure that you have a data source properly configured on the *E920* Deployment Server so this machine can access system tables for the previous release residing on a different machine. This is because the installation planner must import information from previous system data source in order to recognize and upgrade your existing environment.

If the Installation Planner cannot detect the System data source on this machine and it is an upgrade plan, it displays this screen prompting you to enter the information about the previous System data source.

1. On Custom Installation Plan, Data Source Revisions, select the appropriate tab for your previous database and complete the fields to match your previous data source.

   For example, if your previous data source was Oracle, your previous platform was Linux, and your previous EnterpriseOne applications release was Tools Release 9.1, a properly completed form would look like this:



2. Click the **OK** button to verify your data source connection information to the System data source on the remote machine.
3. At this point you can return to Step *4* to continue with Data Source Revisions, Previous J.D. Edwards Configuration.

6 Working With Installation Workbench

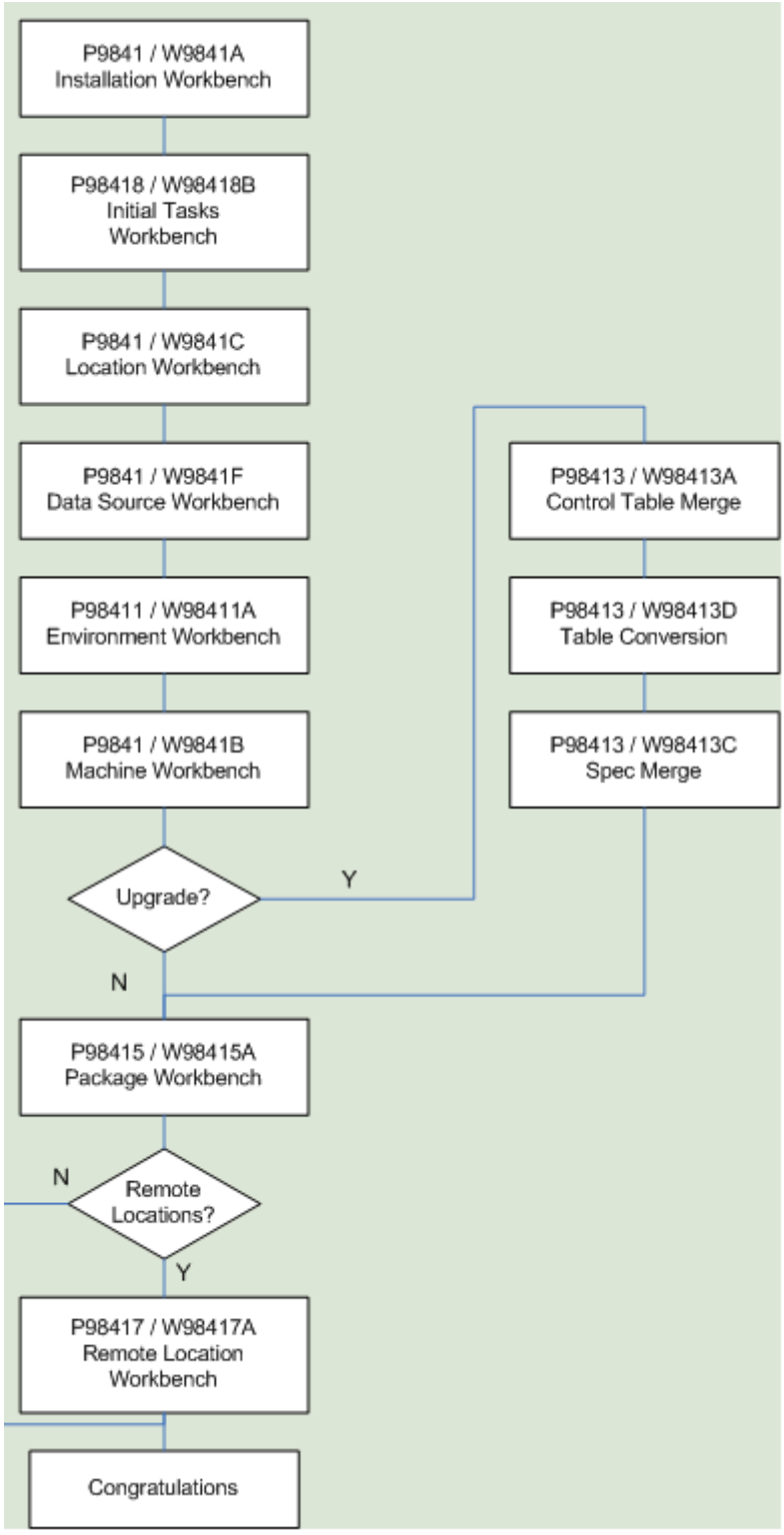
Understanding Workbench Components

After planning the *Release 9.2* upgrade using Installation Planner, you should run the plan using Installation Workbench. The logic of this program runs specific workbench programs according to the plan you created.

The Installation Workbench is a series of JD Edwards EnterpriseOne applications that are linked together to perform the various tasks of Install, Upgrade and Update of JD Edwards EnterpriseOne on the Deployment Server.

Installation Workbench can be run in attended mode or unattended mode. In attended mode, you start each workbench after the previous workbench completes. In unattended mode (the default value), each workbench runs without user intervention. You can set task breaks before or after any specific workbench to stop the process at any point. If using unattended mode, you must check that each task ran successfully.

The workbenches flow in the order shown in the following diagram.



As listed in this table, Installation Workbench includes the components, some or all of which might be used for your upgrade, depending on your installation plan:

Installation Workbench Component	Functional Description
Initial Tasks Workbench	When using unattended workbench mode, this workbench runs Media Object Conversion (only for Xe and ERP 8.0), Release Master, Copy Data Dictionary, Copy System Tables, Security Copy, and User Defined Objects Copy (applies to upgrades from E900 and E910) after Installation Workbench is started and before Location Workbench begins.
Location Workbench	This workbench copies all locations that are defined in the plan from the F9654 and F984021 tables in the Planner data source to the *System - 920* data source.
Data Source Workbench	Copies all data sources that are defined in the plan from the F98611 and F986115 tables in the Planner data source to your *System - 920* data source. It also updates the F98401 table to indicate completion.
Environment Workbench	Checks the Table Conversion Scheduler (F98405) and calls B984052 to load data (R98403), creates the table and index (R98407), and copies the path code (R9800942) if scheduled, and Object Librarian Copy (R98604) if Simplified Upgrade. Updates the status in F98405 to indicate completion (60), and writes a conversion log record to the Table Conversion - History Log table (F984052), then updates the F98403 table to indicate completion.
Machine Workbench	Copies the F9650 and F9651 tables from the Planner data source to the *System - 920* data source. It then updates the F98402 table to indicate completion and uses the environment information to populate the F986101 and F98611 tables in the Server Map data source. Only valid environments, data sources, and server map tables are created.
Control Table Workbench	Runs the batch applications for the planned merges that update the data dictionary, user defined codes (UDCs), Solution Explorer, and other Control Tables. It then updates the F98405 table to reflect completion, and writes a conversion log record to the F984052 table. Also runs the batch applications for the planned merges to update language files. This workbench runs only for users who are adding an alternate language to their installations.
Table Conversion Workbench	Runs the table conversions that convert the technical and application tables to the new format for *Release 9.2* . It then updates the F98405 table to indicate completion, and writes a conversion log record to the F984052 table. During your upgrade you may choose to defer index builds for very large tables, for tables that are converted several times during the Table Conversion Workbench, or if you are planning on a Unicode conversion. For details and instructions on deferring index builds, refer to the subsection in this guide entitled: *Deferring Indexes for Table Conversion Workbench*.
Control Table Workbench	Runs the batch applications for the planned merges that update the data dictionary, user defined codes (UDCs), Solution Explorer, user overrides tables, and other control tables. It then updates the F98405 table to indicate completion, and writes a conversion log record to the F984052 table. Also runs the batch application for the planned control table merges to update language files. Also runs the batch applications for the planned merges to update the data dictionary. It then updates the F98405 table to indicate completion, and writes a conversion log record.
Specification Table Merge Workbench	Runs the batch applications that merge custom modifications into the new specification tables.It then updates the F98405 table to indicate completion, and writes a conversion log record. The Object Librarian and Versions List merges are now a part of the specification merge.
Package Workbench	Transfers the F9603 and F9631 tables from the Planner data source to the *System - 920* data source. It then updates the F98404 table to indicate completion.

This section describes:

- *Verifying the Network Share on the Deployment Server*
- *Loading Data (Demo Data and Production Data)*
- *Creating the Job Queue*
- *Deferring Indexes for Table Conversion Workbench*

See Also

Major Technical Tables in this guide for more information about individual tables and their uses.

Chapter 18, "Performing a Data-Only Upgrade" for more information about data-only upgrades.

Verifying the Network Share on the Deployment Server

When you created the plan, this network share was created:

\\depsvrname\ *E920*

where **depsvrname** is the name of your Deployment Server.

Because several of the Workbenches update files through the network share, these workbenches will fail if the share is not writeable. Sometimes the security settings on your Deployment Server will prevent the Planner from creating the share as a writeable share.

Use this procedure to ensure that the share is writeable before proceeding:

1. On the Deployment Server, navigate to Start | My Computer | Manage
2. Open Shared Folders.
3. Open Shares.
4. Right click on *E920* and select Properties and then Share Permissions.
5. Select properties then select Share Permissions
6. Make sure that Everyone is set to Full Control, Change, Read permissions.

Note: Even after the Workbenches are complete, you will still need these settings on the Deployment Server's share in order to successfully perform client installs.

Loading Data (Demo Data and Production Data)

While previous versions of *JD Edwards EnterpriseOne* used Workbench components to load data, for *Release 9.2* the Platform Pack Installer loads appropriate data into specific environments as follows:

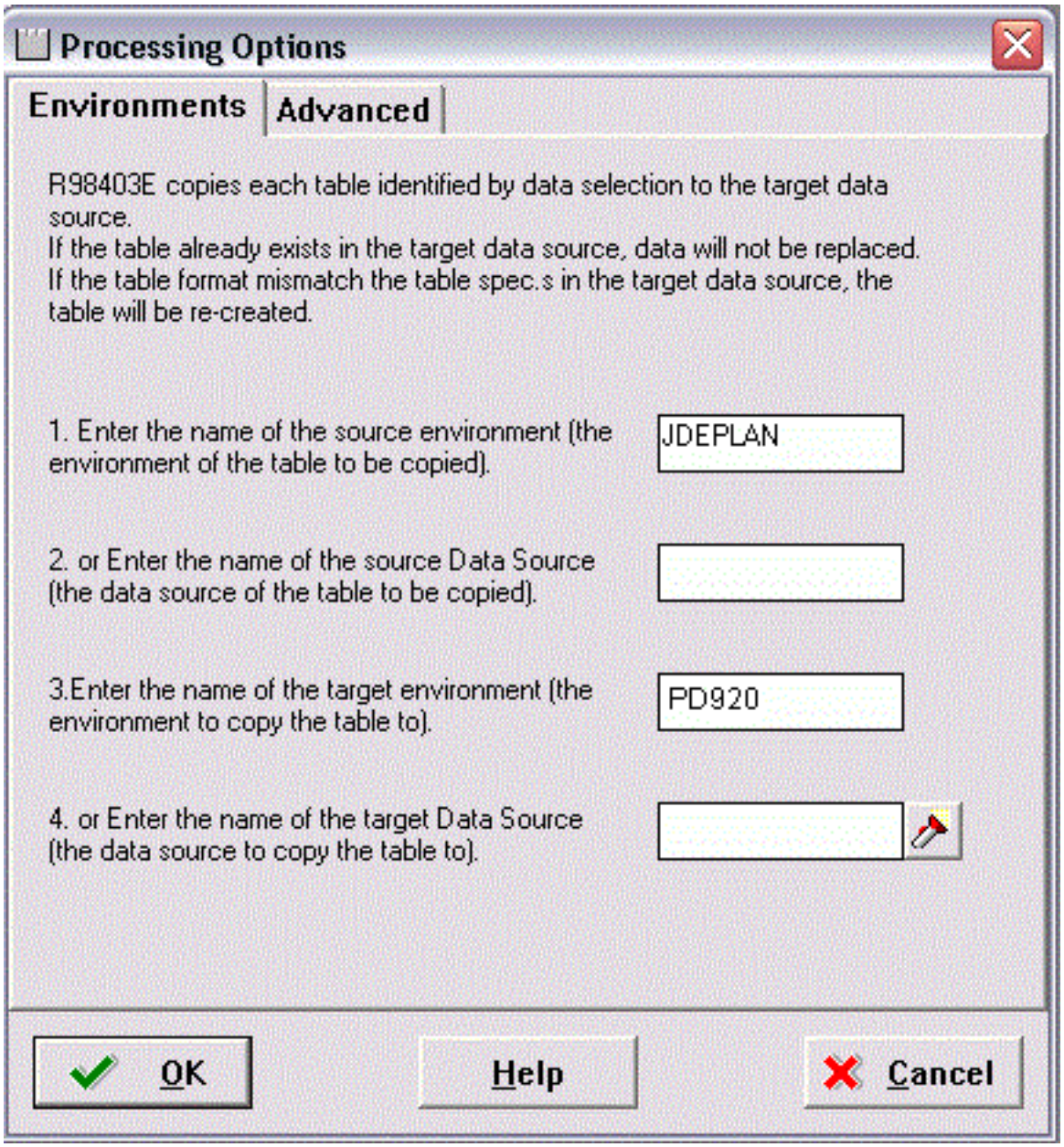
- Demo data to Development and Pristine environments.
- Production data to Production and Prototype environments.

To load demo data in Production or Prototype environments, you must run a UBE (R98403E) to copy the data to those environments.

Note: The "from" (source) environment can be the Planner environment or your Pristine environment.

CAUTION: You should **not** change the record selection on this UBE.

1. Run R98403E using the XJDE0009 version and set the processing options as follows:



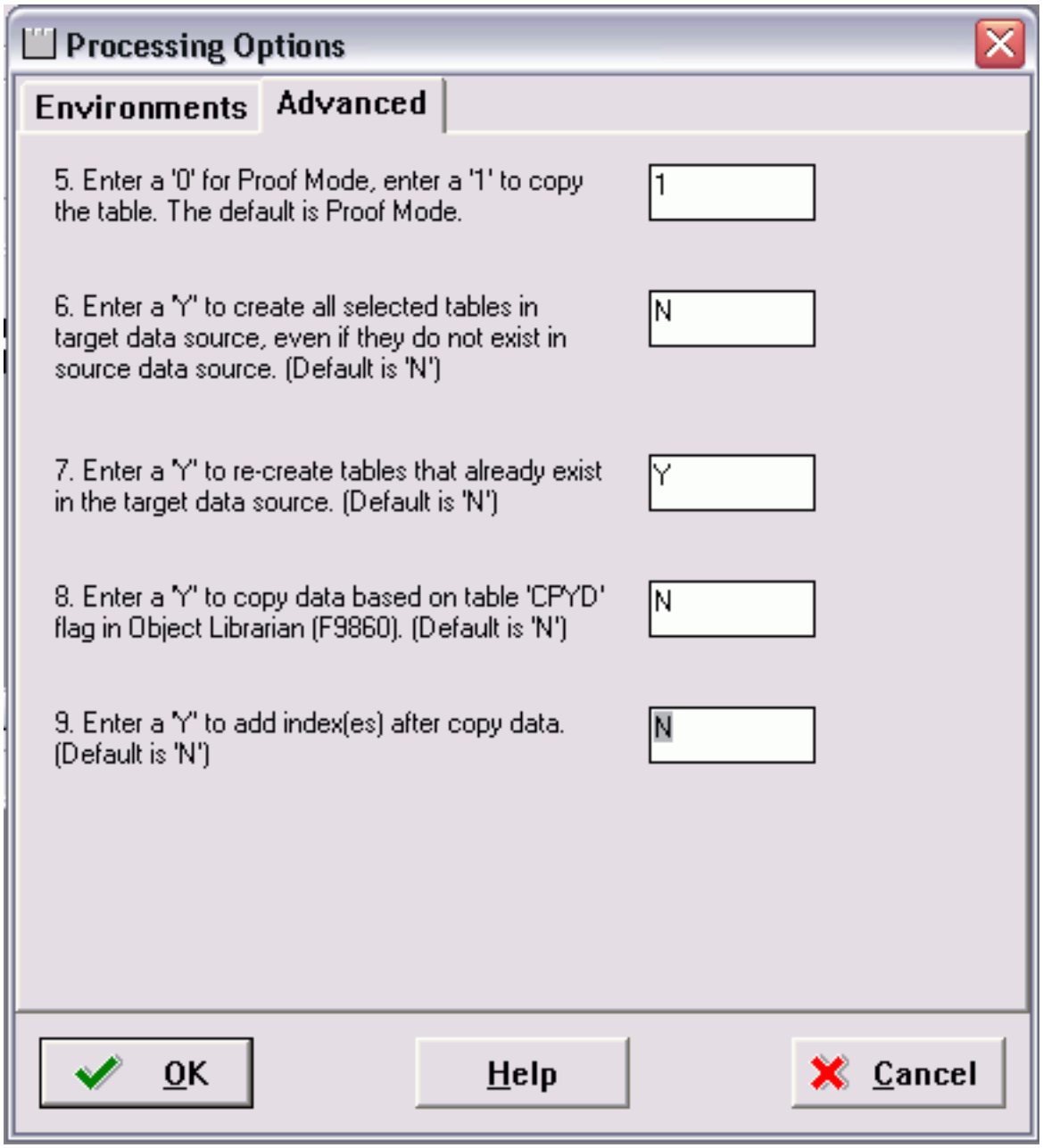
2. On Processing Options 1-4, complete these fields:
   - *Option 1*
     Enter the name of the source environment, which is the environment of the table to be copied. For example, JDEPLAN.
   - *Option 2*
     This field must be blank because this UBE is used to copy a mixture of business data and control tables which are specified to environments, not data sources.

- *Option 3*

  Enter the name of the target environment, which is the environment to which you wish to copy the table. In this case, you would specify either the Production or Prototype environments. For example, PD *920* .
- *Option 4*

  This field must be blank because this UBE is used to copy a mixture of business data and control tables which are specified to environments, not data sources.

3. Click OK to continue specifying processing options.



4. On Processing Options 5-9, complete these fields:

Field	Description
Option 5	The recommended value is 1, which copies the table. The default value is 0, Proof Mode.
Option 6	The recommended value is N, which copies tables only if they exist in the source. Enter Y to copy tables whether or not they exist in the source data source. The default value is N.
Option 7	The recommended value is Y, which recreates tables that already exist in the target data source. **Note:** If you do not recreate the tables, you will end up with a mixture of production and demo data in the tables. The default value is N.
Option 8	The recommended value is N, which forces a copy of the data, ignoring the CPYD flag. **Note:** A value of Y will leave almost all tables empty. That is, a production data load. The default value is N.
Option 9	The recommended value is N, which creates the indexes on the tables before copying the data. This prevents duplicate rows. **Note:** A value of Y copies the data and then create the indexes. The default value is N.

5. Click OK to accept the values and start the UBE.

Creating the Job Queue

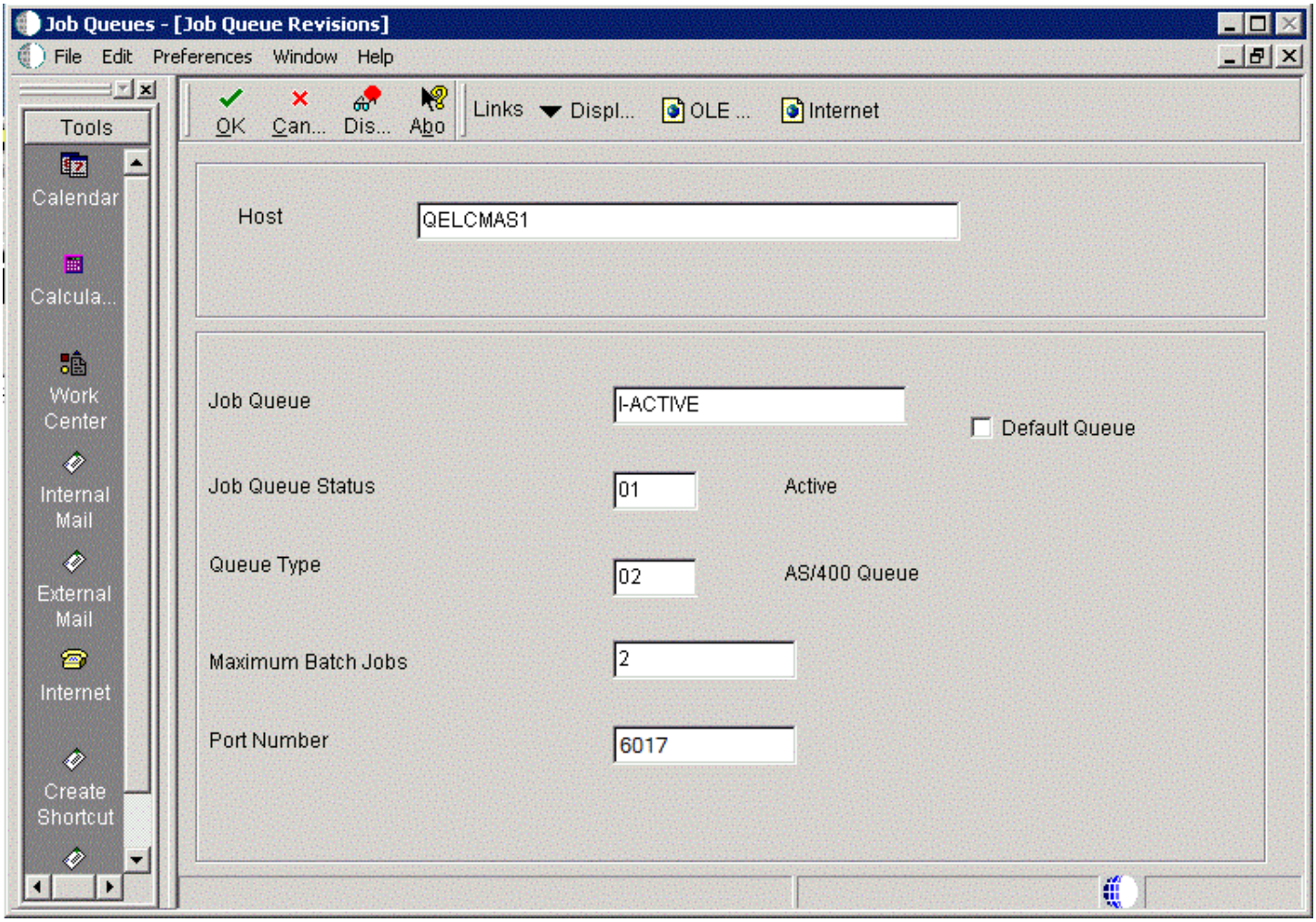
You may set up the job queues before running the Installation Workbench. If you do not, Initial Tasks Workbench will create a default entry for QBATCH with a setting of *maximum=4*.

Note: For Queue Type 2, the *Release 9.2* Job Queue name must match an existing *IBM i* JOBQ.

To create the job queue:

1. Enter GH9013 in the Fast Path field and start the Job Queues program (P986130).

2. Click Add.

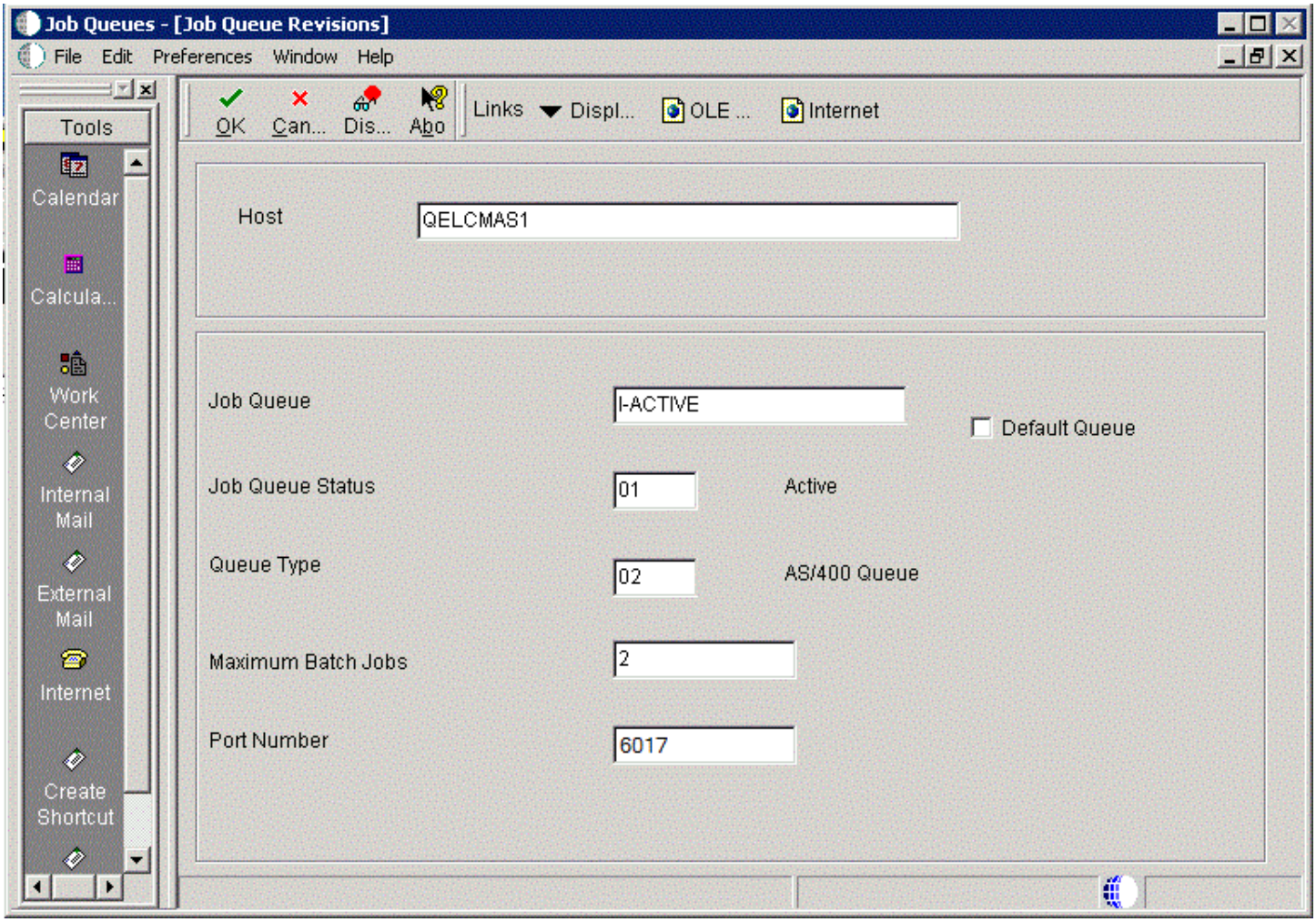


3. On Job Queue Revisions, add a queue by completing these fields:

Field	Description
Host	Enter the Enterprise Server name.

Field	Description
Job Queue	Ensure that the queue name matches the batch queue name on the *IBM i* . Typically *IBM i* machines use the batch queue **QBATCH** as their default.
Default Queue	Turn on this option by clicking the check box.
Job Queue Status	Enter **01**.
Queue Type	Enter **02**.
Maximum Batch Jobs	Enter a value that equals the number of processors on the Enterprise Server machine.
Port Number	Enter ***6017*** . If you receive a Network Failed error, you can safely ignore it in this case.

4. Add another queue called *I-ACTIVE*.



5. On Job Queue Revisions, add a queue by completing these fields:

Field	Description
Host	Enter the Enterprise Server name.

Field	Description
Job Queue	Enter the Job Queue name: *I-ACTIVE*.
Default Queue	Turn off this option by clicking the radio button.
Job Queue Status	Enter *01*.
Queue Type	Enter **02**.
Maximum Batch Jobs	Enter a value that equals the number of processors on the Enterprise Server machine.
Port Number	Enter ***6017*** .

Deferring Indexes for Table Conversion Workbench

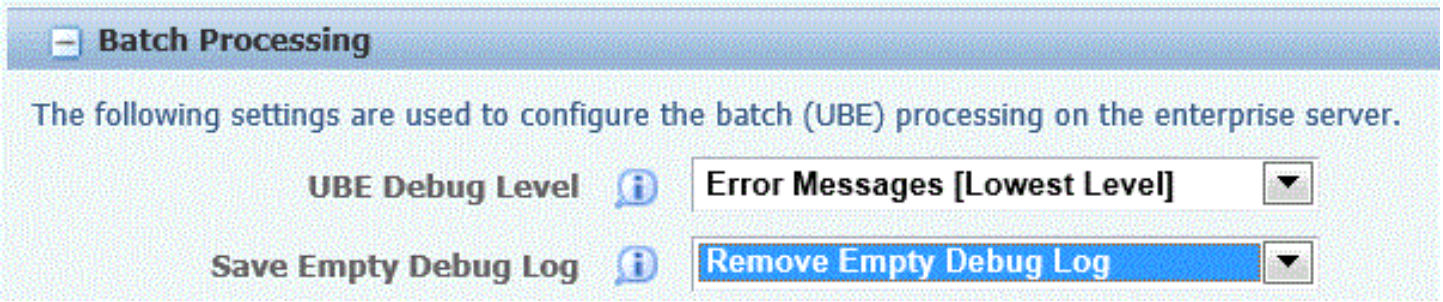
If you wish to delay building indexes during the Table Conversion Workbench, you must set that attribute in the Table Conversion Plan before running the Installation Workbench. For implementation details, refer to *Deferring Index Builds During Table Conversion Workbench*.

Enable Logging for UBEs

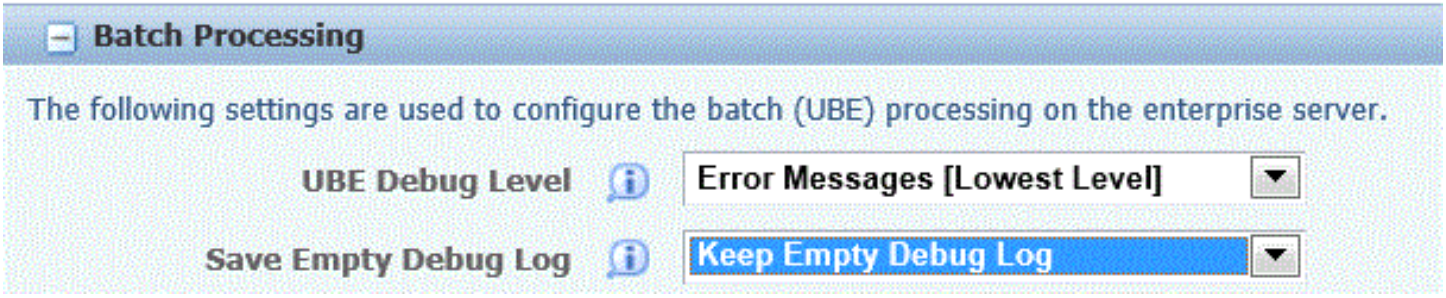
> **CAUTION:** For Upgrades, it is very important that you enable logging for UBEs prior to running any workbenches that perform Table Conversions. Otherwise you will not get any logs when you run the Table Conversions regardless of whether you have debug logging turn on. The ability to check the logs to make sure everything runs as expected is critical to ensure the success of your upgrade.

Before running any Table Conversion, you should use Server Manager to enable UBE logging.

In Server Manager, choose the Advanced drop down for Configuration, and then choose Batch Processing. As shown below, the default configuration setting for the **Save Empty Debug Log** field is **Remove Empty Debug Log**, where **Remove** means no logging will be kept.



As shown below, to enable logging for UBEs, you should change the setting for the **Save Empty Debug Log** field to **Keep Empty Debug Log**, where **Keep** means logging is enabled:



After your upgrade is complete and you are no longer running Table Conversions, you can disable UBE logging.

Verifying OCM Mappings

If you are upgrading from Xe or ERP8, before running the Workbench ensure that the OCM mappings for any previous environments in your plan are correct. From B9 onwards, *JD Edwards EnterpriseOne* on *IBM i* systems use LOBs instead of BLOBs.

When you created your upgrade plan and copied the data sources and OCM from your previous System data source, the Planner flagged all the regular data sources as LOB data sources. However, any existing *data_source_name* ' DNT data sources were not flagged, and remain as BLOB data sources. When you finalize the plan, it automatically deactivateds all *data_source_name* ' DNT OCM mappings for the previous environments in your plan, and activated the non-DNT data sources instead.

When you created your upgrade plan and copied the data sources and OCM from your previous System data source, the Planner flagged all the regular data sources as LOB data sources. However, any existing data_source_ name DNT data sources were not flagged, and remain as BLOB data sources. When you finalize the plan, it automatically deactivateds all data_source_name DNT OCM mappings for the previous environments in your plan, and activated the non-DNT data sources instead.

As a result, prior to running the Workbench, you should verify the accuracy of the OCM mappings after you run the Planner. Ensure that no *data_source_name* - DNT mappings are active for the previous environment(s) in this plan.

Examples of *data_source_name* - DNT mappings are:

Table	DNT Data Source
F98811	Control Tables -*data_source_name* - DNT
F9060	System - *release_number* - DNT
F983051	Versions - *data_source_name* - DNT

Tip: In order to verify basic functionality of your OCM mappings, you should run a sample UBE (for example, R0006P or R014021) in PS8 *920* on your Enterprise Server.

Adding an Entry to the Remote Database Directory

You can add an entry to the remote database directory by completing these steps:

1. Log on to the *IBM i* as QSECOFR.
2. On the command line, enter WRKRDBDIRE.
3. Look for an entry on your *IBM i* for Remote Location *LOCAL. This entry must have the same name as your machine.
4. If you do not have an entry like this, enter *1* in the Option column and type you machine name in the Relational Database column, and press enter. In the Remote Location Name or Address field, enter **LOCAL* and press Enter. If you already have a **LOCAL* entry and the Relational database name is not the same as your machine name, you must remove the entry that you have and add a new entry as previously described.

   Note: In previous *JD Edwards EnterpriseOne* releases, installation of Vertex required adding an entry to the Remote Database Directory, but no special naming was required. It is possible, in some cases, an entry was added with some other naming convention for this purpose. Vertex will work with a Remote Database Directory entry that is correct for *Release 9.2* .

5. Once you have added or change the entry, you should recycle the database host server prestart jobs by issuing these commands:

```
ENDPJ SBS(QSERVER) PGM(QSYS\QZDAINIT) OPTION(*IMMED)
ENDPJ SBS(QUSRWRK) PGM(QSYS\QZDASOINIT) OPTION(*IMMED)
ENDPJ SBS(QUSRWRK) PGM(QSYS\QZDASSINIT) OPTION(*IMMED)
STRPJ SBS(QSERVER) PGM(QSYS\QZDAINIT)
STRPJ SBS(QUSRWRK) PGM(QSYS\QZDASOINIT)
STRPJ SBS(QUSRWRK) PGM(QSYS\QZDASSINIT)
```

   Note: Users will not be able to use *JD Edwards EnterpriseOne* while you are running these commands.

Verifying the Language Code Character Set

Note: This step is only required if your Business Data and Control Tables are non-Unicode. For example, if you are upgrading from JD Edwards Xe.

To verify that the code character set ID for your preferred language is set:

1. On the *IBM i* , enter this command:

   ```
   WRKUSRPRF JDE
   ```
2. Choose option 2 to edit.
3. Press F10 to verify and edit all fields.
4. Scroll to the character set ID (CCSID).
5. Change the setting to your preferred language character set. For example, CCSID=37 (English language).

   For more information, refer to *Database Character Set and Code Page Considerations*.

   This setting will be returned to its original value before you start *Release 9.2* on your Enterprise Server.

Working with Unattended Workbench Mode

This section discusses:

- *Selecting Attended or Unattended Workbench Mode*
- *Setting a Task Break in Unattended Workbench Mode*

Selecting Attended or Unattended Workbench Mode

The workbenches can be run manually (attended workbench mode) or automatically (unattended workbench mode). When running Workbench in unattended mode, start Installation Workbench as described below, and then the status of each workbench is displayed as the workbench begins. Unattended workbench is the default value.

In unattended workbench, if an error is encountered in any of the individual workbenches, the process stops. After fixing the error, unattended workbench resumes where it left off.

To choose the workbench mode:

1. Open the System Installation Tools menu (GH961).
2. Right-click on Installation Workbench.
3. Select Prompt For and then Values.

   The Processing Options form appears.
4. In the appropriate processing option field:

   For **unattended** workbench mode, enter **1**.

   For **attended** workbench mode, enter **0** (zero).

The default value is 1 (**unattended** workbench mode).

5. Click the **OK** button.

   Work with Installation Plan appears.

Setting a Task Break in Unattended Workbench Mode

In unattended workbench, you can set task breaks before or after any of the individual workbenches. You can use the task break to verify successful completion of a workbench or for other tasks. For example, set a task break after Table Conversion Workbench to verify that all table conversions completed successfully. An automatic task break occurs after Control Table Workbench, preceding Table Conversion Workbench.

To set a task break in unattended workbench mode:

1. Open the System Installation Tools menu (GH961).
2. Select Advanced Operations.
3. Double-click Work with Task Breaks.

   The Work with Task Breaks form appears.
4. Click Find.

   A list of the workbenches appears.
5. To set a break before or after a workbench, choose the workbench name, and, on the Row menu, select Break Before or Break After.

   You can clear task breaks on the Row menu.
6. On Task Break Revisions, specify the following fields:

   - *email Address (optional)*

     Specify (or choose from a list) the address book number of the person who is to be notified when the task break occurs.
   - *Task Break*

     Specify (blank) for no task break or 2 for a customer task break. If the field is left blank, then no task break is configured.
   - *Task Break Short Text (required)*

     Enter a short text description of the task break.
   - *Optional Detail (optional)*

     Enter detailed information about the task break.
7. Click OK.

   Task Break Revisions closes, and Work with Task Breaks reappears. Specify any further task breaks.
8. Click Close.

Solution Explorer

If you used both Menu and Solution Explorer Task tables in the previous release, you must update the Task Explorer tables from the Menu tables. If you already converted to Task Explorer in the Xe or ERP8 releases, you need to disable the R9000C report before running the Control Table Workbench.

Changing the Status of the Control Table Workbench Tasks

To change the status of a Control Table Workbench task:

1. Enter GH961 in the Fast Path field to open the System Installation Tools menu.
2. Double-click Custom Installation Plan.
3. On Work with Installation Plans, select your installation plan.
4. On the Row menu, click Expand.

   The plan components, including the Control Table Merge, are displayed.
5. Choose the task whose status you want to change.
6. On the Row menu, click Disable, Enable, or Complete (see the list below).

   The task status changes.

   - *Disable*

     Displays a status of 70 to indicate the task is incomplete, and will not be rerun.
   - *Enable*

     Displays a status of 10 to indicate the task will be rerun.
   - *Complete*

     Displays a status of 60 to indicate the task is complete, and will not be rerun.

Verify and Update P98MOQUE Settings

To verify and update the P98MOQUE settings:

1. Log into *Release 9.2* as JDE in the *JDEPLAN* environment.
2. Enter P98MOQUE in the Fast Path field.
3. Click Find.
4. Ensure your P98MOQUE grid lines are set to point to the location of the previous release media objects.
5. Click OK.

Starting Installation Workbench

CAUTION: Before starting the Installation Workbench, ensure that the JD Edwards EnterpriseOne Services are started on the Enterprise Server.

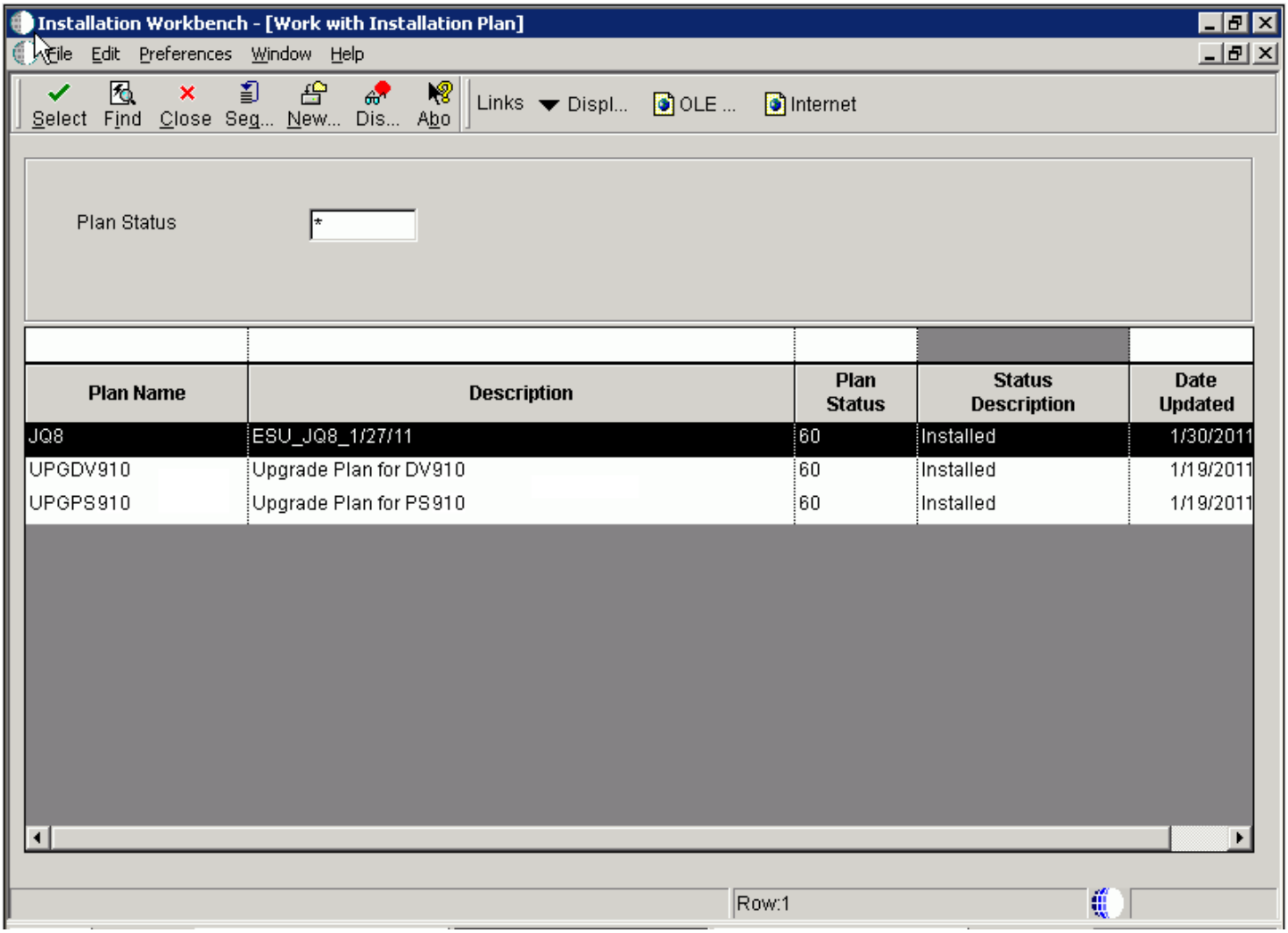
CAUTION: Do not lock the Deployment Server during Installation Workbench processes (for example, with a screen saver password); doing so pauses some processes. Do not run Installation Workbench from a remote access program that simulates a local connection.

To start the Installation Workbench:

1. On your Deployment Server, log in to the Planner environment, which is JDEPLAN.

2. From the System Installation Tools menu (GH961), choose Installation Workbench.

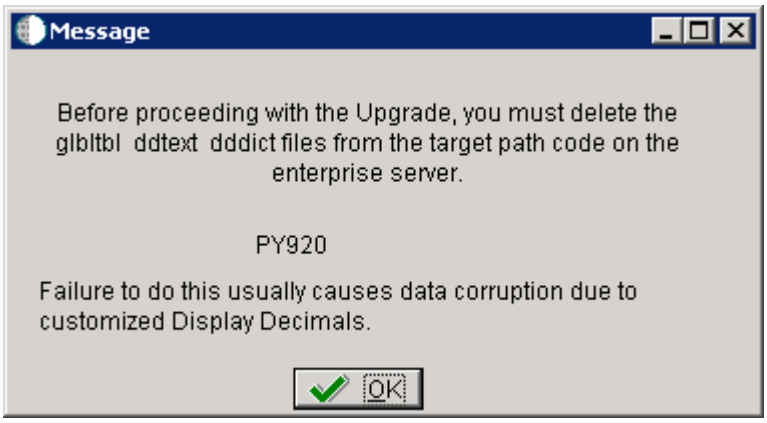
   When this application is run the first time, the system downloads all required objects using Just In Time Installation (JITI).



- If you specified attended workbench mode, use the following procedures, including the Initial Tasks Workbench, to complete the workbenches.

- If you specified unattended workbench mode, the process begins and all workbenches are completed automatically, unless task breaks are set. If you did not set any task breaks, continue with *Working With the Enterprise Server*.

3. On Work with Installation Plan, double-click your plan.
4. If you have selected that you want to run Table Conversions on the Enterprise Server, the Installation Workbench displays the following message:



This message warns that before proceeding with the Upgrade, you must delete the glbltbl, ddtext, and dddict spec files from the target path code on the Enterprise Server. Failure to do this usually causes data corruption due to customized Display Decimals.

At this point you should delete these spec files as instructed, and then click the **OK** button in the Message to continue.

Working With Initial Tasks Workbench

Before the workbench is run, the F00945 table in the System data source is blank because it is no longer populated when a plan is validated. However, after you run the Initial Task Workbench several tables in the System data source are populated including the F00945 table.

The Initial Tasks Workbench form lets you complete the following preliminary tasks before the individual workbenches begin:

- Security copy
- Media Object (Inplace) Unicode Conversion (applies to upgrades from Xe and ERP 8.0)
- Data Dictionary Media Object Unicode Conversion (applies to upgrades from Xe and ERP 8.0)
- Copy data dictionary
- Copy system tables
- Release Master

You can also change the status of any of the initial tasks, for example, if you need to rerun a task.

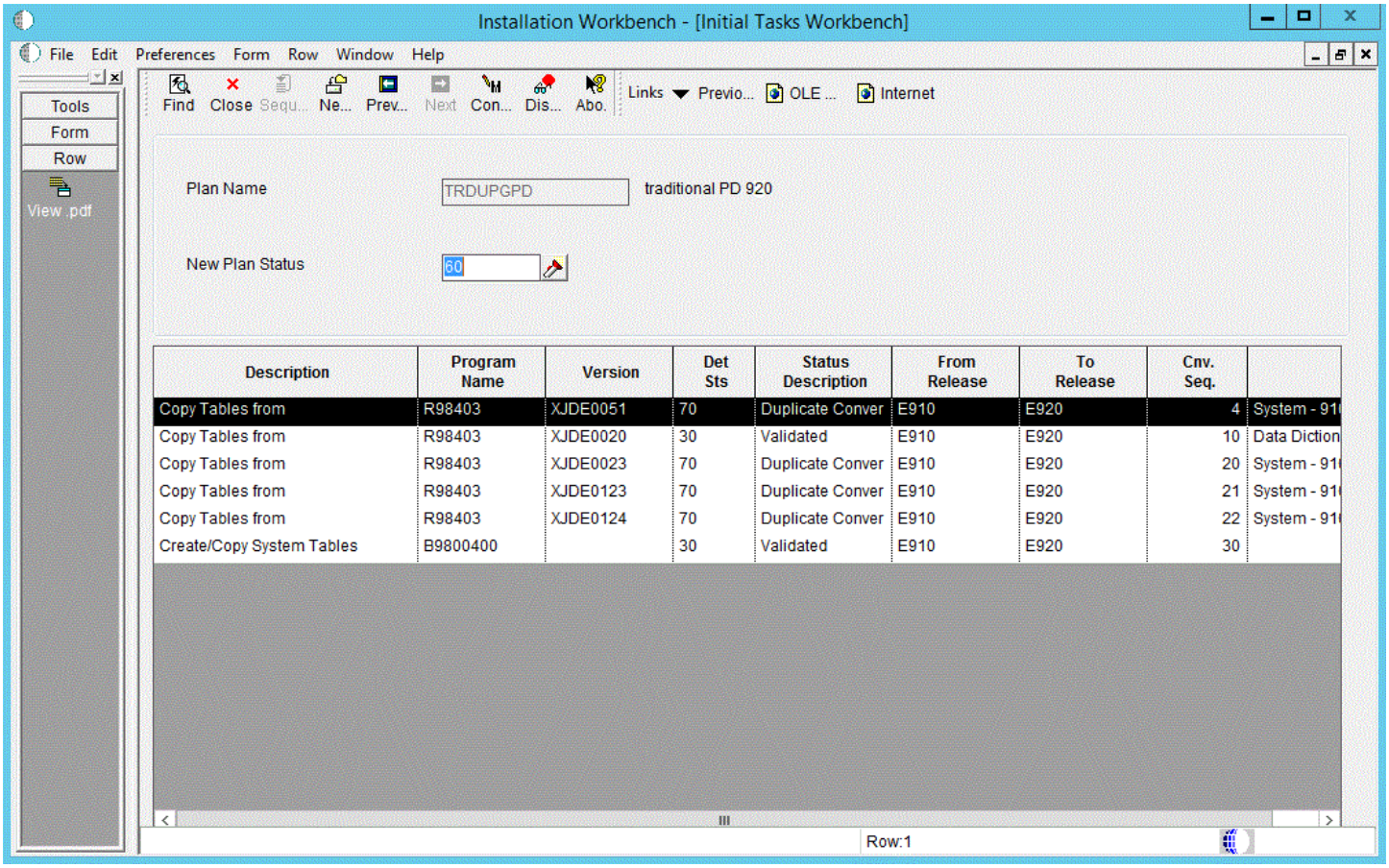
You use this procedure if you are running Workbench in attended mode or if you set a task break before Initial Tasks Workbench.

This sections describes these tasks:

- *Using Initial Tasks Workbench*
- *Changing the Status of Initial Tasks Workbench*

Using Initial Tasks Workbench

To use Initial Tasks Workbench:


Installation Workbench - [Initial Tasks Workbench]
File Edit Preferences Form Row Window Help
Tools
Form
Row
View .pdf
Find Close Sequ... Ne... Prev... Next Con... Dis... Abo...
Links Previo... OLE ... Internet
Plan Name
TRDUPGPD
traditional PD 920
New Plan Status
30
Description
Program Name
Version
Det Sts
Status Description
From Release
To Release
Cnv. Seq.
Copy Tables from R98403 XJDE0051 70 Duplicate Conver E910 E920 4 System - 91
Copy Tables from R98403 XJDE0020 30 Validated E910 E920 10 Data Diction
Copy Tables from R98403 XJDE0023 70 Duplicate Conver E910 E920 20 System - 91
Copy Tables from R98403 XJDE0123 70 Duplicate Conver E910 E920 21 System - 91
Copy Tables from R98403 XJDE0124 70 Duplicate Conver E910 E920 22 System - 91
Create/Copy System Tables B9800400 30 Validated E910 E920 30
Row:1

On Initial Tasks Workbench, click the Form menu and select Configure.

The tasks are performed, and the Location Workbench form appears.

During the Initial Tasks Workbench, there are two UBEs scheduled for media object Unicode Conversion if upgrading from ERP 8.0 or earlier:

- The R8900165 report converts the media objects stored in Business Data.
- The R8900165U report converts the Data Dictionary media objects.

The following list of error messages and the corresponding resolutions, (inspect the `jde.log` for more information):

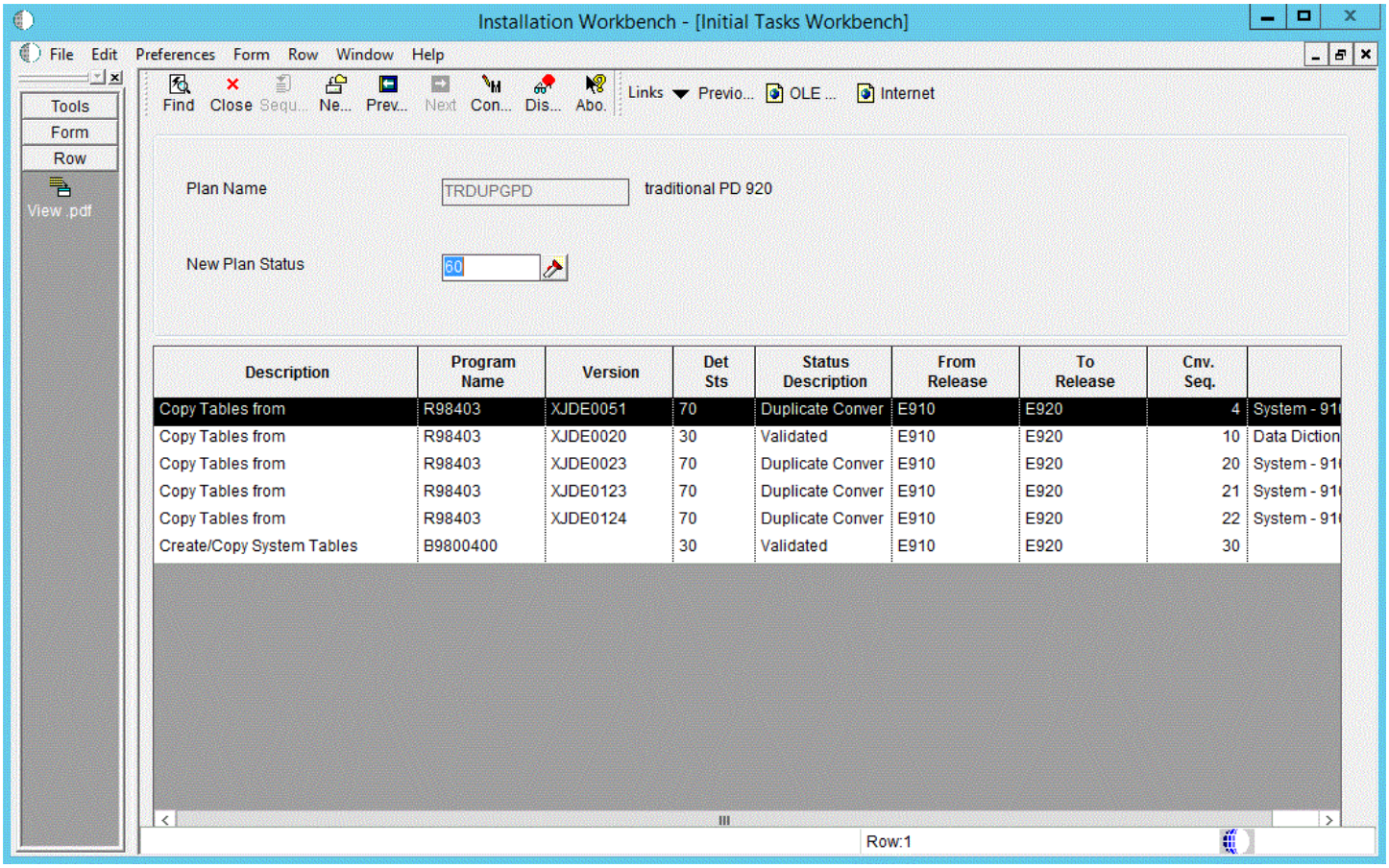
Error Message	Resolution
SelectKeyed to F00165T failed	Check F00165T spec, and run again.
Read Failed: Media Object data not available in F00165T blob	The object is missing or corrupted, and must be added manually.
Read Failed: Cannot allocate memory for Media Object Blob	Check virtual memory, and run again.
Read Failed: Missing records for BLOB concat - Total(###) - Read(###)	The object is missing or corrupted, and must be added manually.
Cannot allocate memory for Generic Text Blob	Check virtual memory, and run again.
Fail to open OLE storage file (<Queue Path>) -<.stg file name>	Make sure the file exists in the path that defined in the *System - 920* F98MOQUE table (based on <Queue Path>), and run again.
OLE storage file might be corrupted - <.stg file name>	The object is missing or corrupted, and must be added manually.
OLE substorage file might be corrupted - <.stg file name>	The object is missing or corrupted, and must be added manually.
OLE Fail: Insufficient memory to create new file (<Queue Path>) - <filename>	Check virtual memory, and run again.
OLE Fail: Access Denied - cannot create new file (<Queue Path>) - <filename>	Check security setting on OLE queue path folder, and run again.
OLE Fail: Program error - cannot create new file (<Queue Path>) - <filename>	The object is missing or corrupted, and must be added manually.
OLE Fail: Cannot create new file (<Queue Path>) -<filename>	Check rights and disk space on OLE queue path, and then run again.
JDB CommitUser Fails	Check Database (blocks) setting, and run again.

Error Message	Resolution
Invalid Shortcut Data - <file name>	The object is missing or corrupted, and must be added manually.
Invalid Shortcut Data - cannot allocate memory	Check virtual memory, and run again.
Invalid Document ID - <vendor name>	The object is missing or corrupted, and must be added manually.
Secondary RTF File fails to open (<Queue Path>) -<filename>	Make sure the file exists in the path that defined in " *System - 920* " F98MOQUE (based on <Queue Path>), and run again.
Cannot allocate memory for RTF Blob	Check virtual memory, and run again.

Changing the Status of Initial Tasks Workbench

You use this procedure if you are running Workbench in attended mode or if you set a task break before Initial Tasks Workbench.

To change the status of Initial Tasks Workbench:


Installation Workbench - [Initial Tasks Workbench]
File Edit Preferences Form Row Window Help
Tools
Form
Row
View .pdf
Find Close Sequ... Ne... Prev... Next Con... Dis... Abo...
Links Previo... OLE ... Internet
Plan Name
TRDUPGPD
traditional PD 920
New Plan Status
60
Description
Program Name
Version
Det Sts
Status Description
From Release
To Release
Cnv. Seq.
Copy Tables from R98403 XJDE0051 70 Duplicate Conver E910 E920 4 System - 91
Copy Tables from R98403 XJDE0020 30 Validated E910 E920 10 Data Diction
Copy Tables from R98403 XJDE0023 70 Duplicate Conver E910 E920 20 System - 91
Copy Tables from R98403 XJDE0123 70 Duplicate Conver E910 E920 21 System - 91
Copy Tables from R98403 XJDE0124 70 Duplicate Conver E910 E920 22 System - 91
Create/Copy System Tables B9800400 30 Validated E910 E920 30
Row:1

You might want to change the status of one or more of the initial workbench tasks. To change the status of a task, use the following procedure.

1. Enter GH961 in the Fast Path field to open the System Installation Tools menu.
2. Double-click Custom Installation Plan.
3. On Work with Installation Plans, select your installation plan.
4. Select Expand on the Row menu.

   The plan components, including the initial tasks, appear.
5. Select the task whose status you want to change.
6. On the Row menu, click Disable, Enable, or Complete (see the table below).

   The task status changes.

   - *Disable*

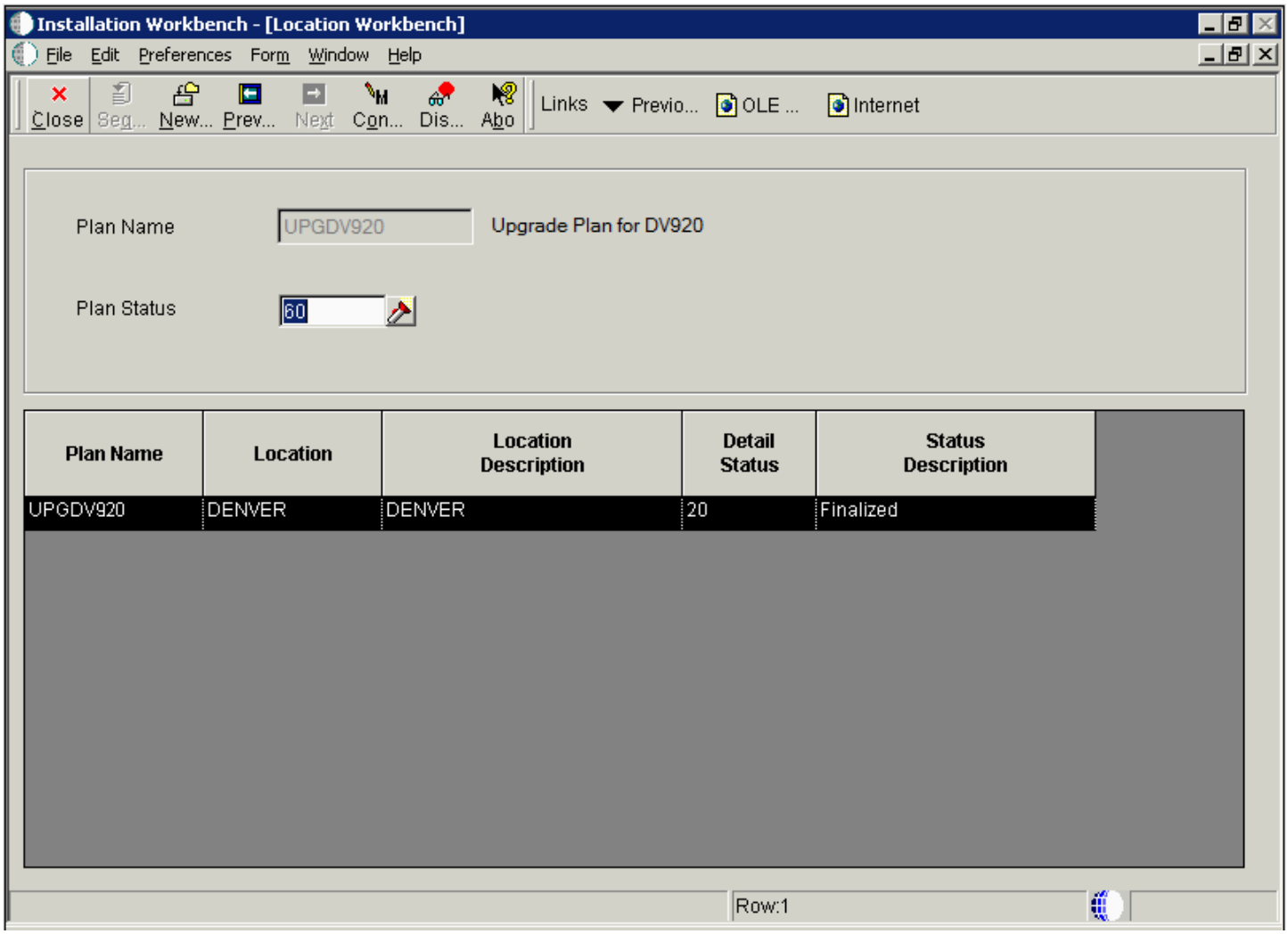
     Displays a status of 70 to indicate the task is incomplete, and will not be rerun.
   - *Enable*

     Displays a status of 10 to indicate the task will be rerun.
   - *Complete*

     Displays a status of 60 to indicate the task is complete, and will not be rerun.

Configuring Your Locations

Location Workbench copies all locations that are defined in the plan from the F9654 table in the Planner data source to the *System - 920* data source. It also updates the F984021 table. Use this procedure when running Workbench in attended mode or if you set a task break before Location Workbench.

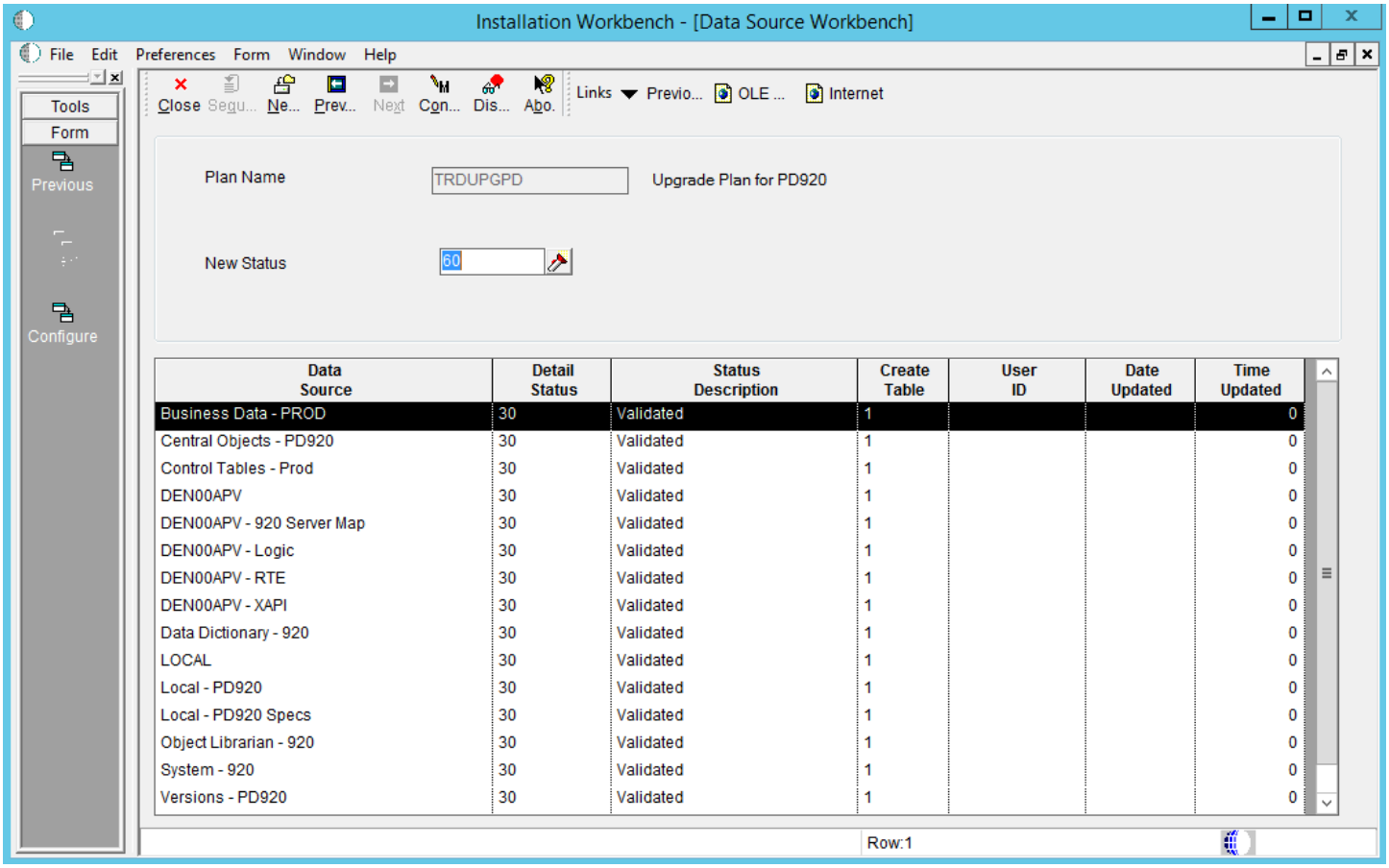


1. On Location Workbench, verify that all of your locations are listed.
2. Select Configure from the Form menu.
   Locations are configured, and the Data Source Workbench form appears.
   The system updates the Detail Status to 60 and changes the Status Description from Validated to Installed.

Configuring Your Data Sources

Data Source Workbench copies all data sources that are defined in the plan from the F98611 table and the F986115 table in your Planner data source to your *System - 920* data source. It also updates the F98401 table to indicate completion. Use this procedure when running Workbench in attended mode or if you set a task break before Data Source Workbench.

1. On Data Source Workbench, verify that all of your data sources are listed as illustrated in this example.



2. Select Configure from the Form menu.

   Your data sources are configured, and the Environment Workbench form appears.

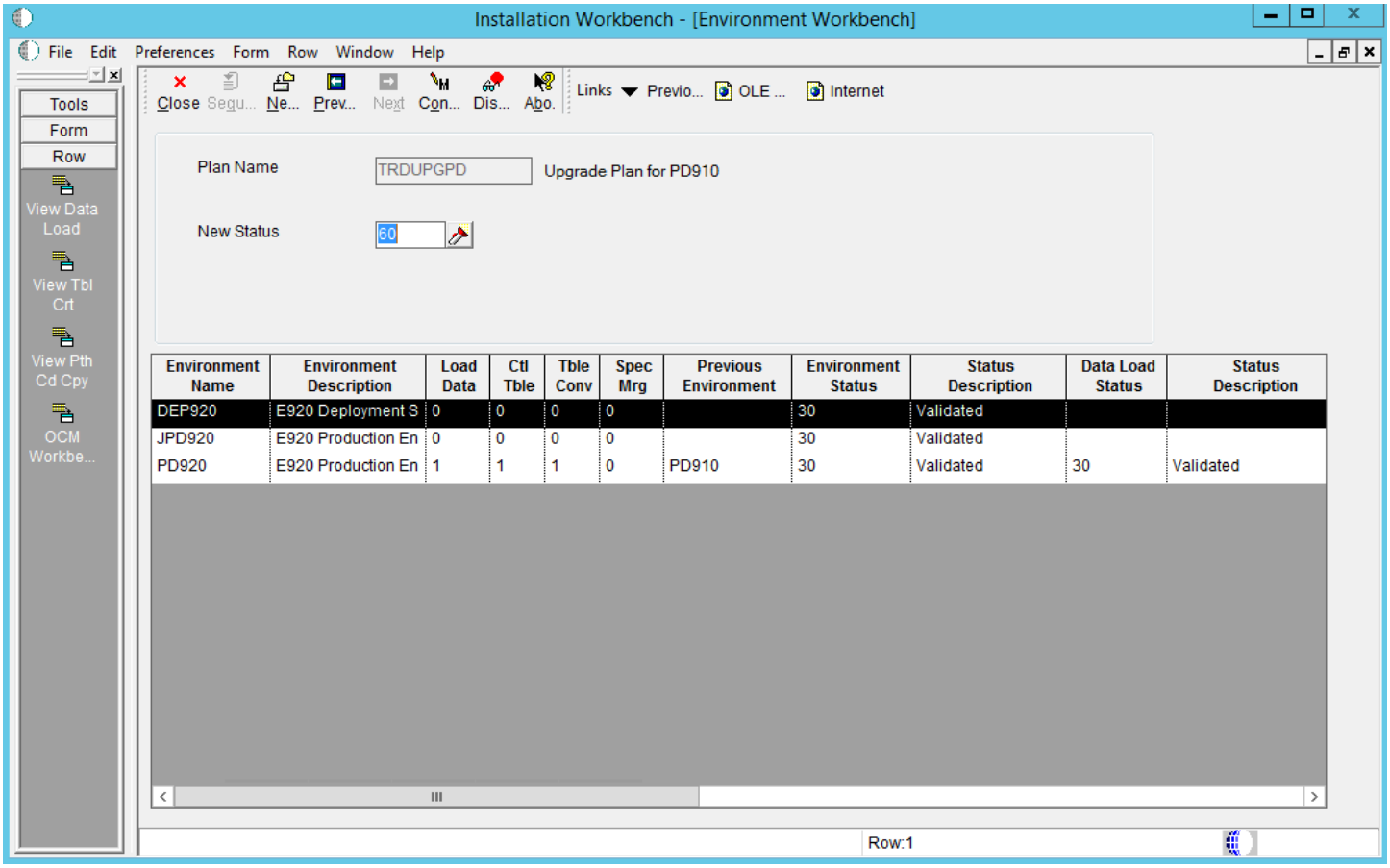
   When the system has configured your data sources, it updates Detail Status to 60 and changes the Status Description from Validated to Installed.

Configuring Your Environments

Environment Workbench copies the F0094, F00941, and F00942 tables, as well as the F986101 table for each environment, from your Planner data source to your *System - 920* data source. It then updates the F98403 table to indicate completion. Depending on the plan settings, it also runs a batch application to copy new generic text and to create and populate Object Management Workbench and version tables.

Environment Workbench can run multiple batch applications simultaneously, which enables *Release 9.2* to load multiple environments at the same time. This reduces the amount of time it takes to load environments.

Use this procedure when running Workbench in attended mode or if a task break is set before Environment Workbench.

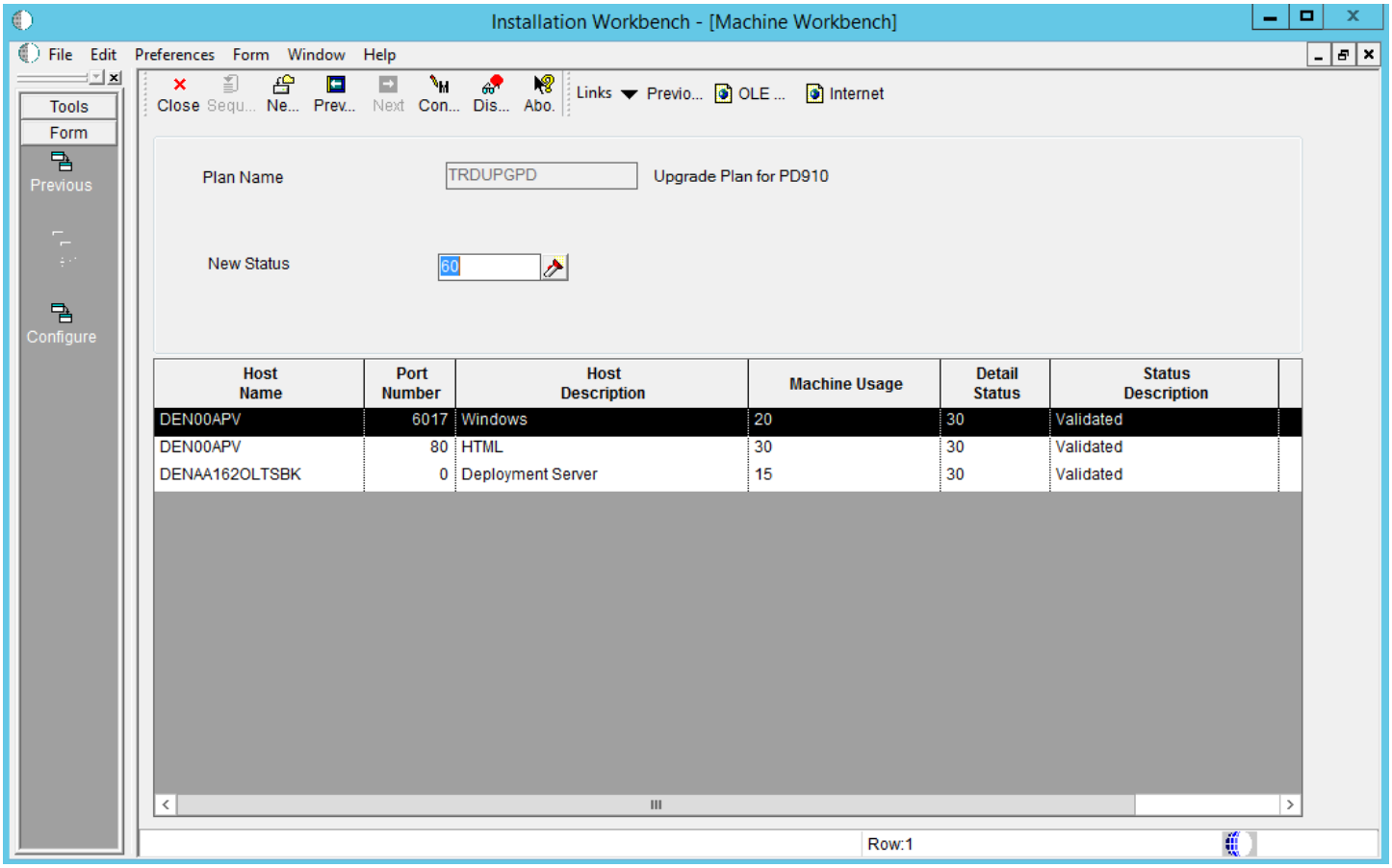


1. On Environment Workbench, review each environment and its associated parameters to make sure the values are correct.
2. After you review the environments, select Configure.
3. When Environment Workbench has completed, verify that the status of each environment has been updated to 60 and that the status description has changed from Validated to Installed.
4. Using Adobe Acrobat, review all XJDE reports, and confirm that all configuration statuses indicate Success.

Using Machine Workbench

Machine Workbench copies the F9650 and F9651 table from the Planner data source to the *System - 920* data source. It then updates the F98402 table to indicate completion and uses the environment information to populate the F986101 and F98611 tables in the Server Map data source.

Note: Only valid environments, data sources, and server map tables are created.



1. On Machine Workbench, review each server and its associated parameters for the correct values.
2. Select Configure from the Form menu.

   When the system has configured your servers, it changes the detail status to 60, and Status Description changes from Validated to Installed.

Understanding Control Table Merges

Control Table Workbench runs the batch applications for the planned merges that update the data dictionary, user defined codes (UDCs), Solution Explorer, and other control tables. It then updates the Table Conversion Scheduler table (F98405) to indicate completion, and writes a conversion log record to the Table Conversion - History Log table (F984052).

Note: The number of control tables to be merged varies, depending on the upgrade being performed. Your Control Table Workbench form may list fewer or more tables than shown in the figure above. If you used Solution Explorer task tables in a previous release, disable R9000C before running the Control Table Workbench.

Language Installation

This information applies to users installing an alternate language. The distributed language tables consist of control tables, system tables, and data dictionary tables. The UDC tables contain only the desired language text, while the Solution Explorer text and data dictionary files add the desired language on top of the already-installed English records.

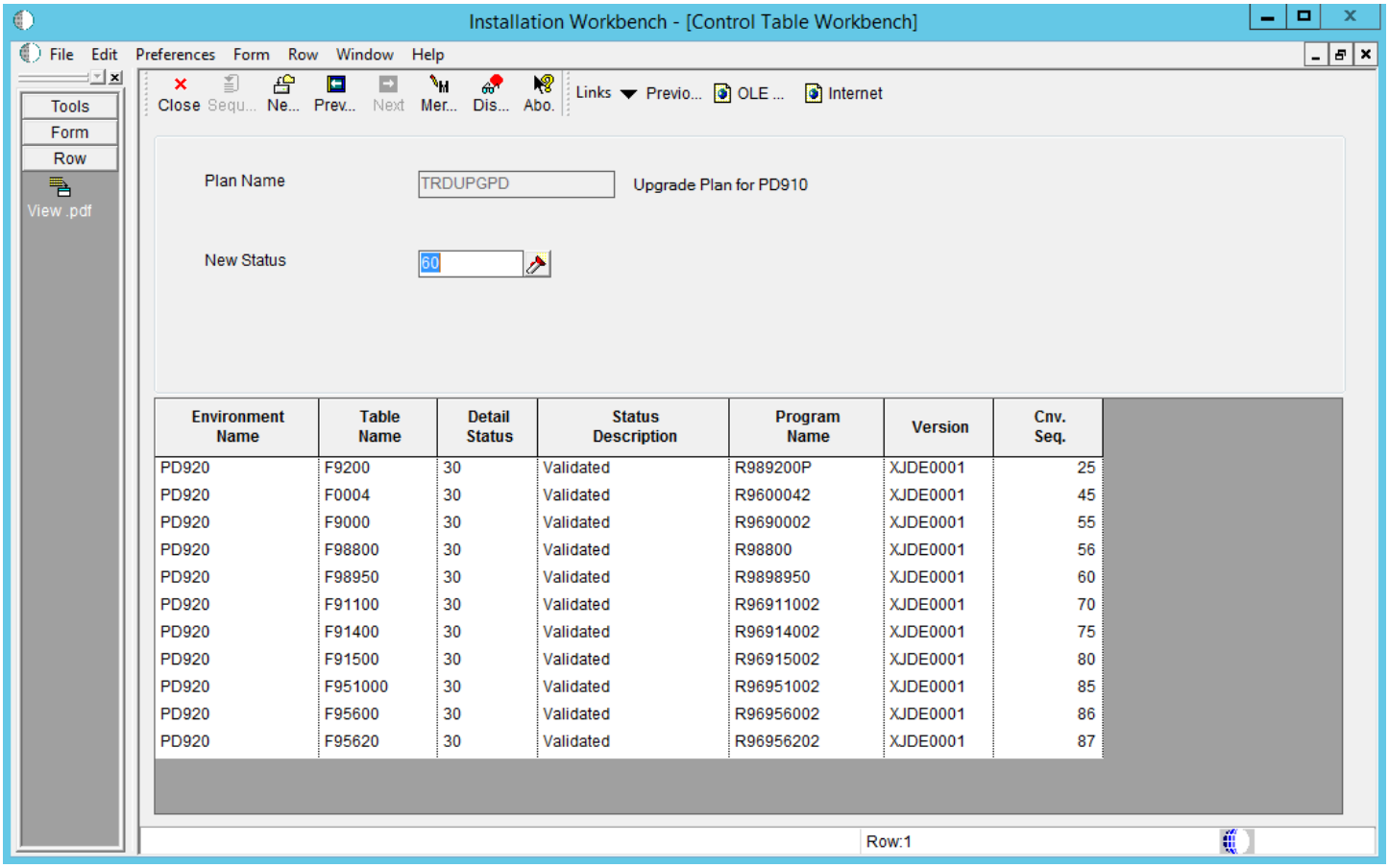
Control Table Workbench also copies the language text from the Oracle tablespace that contains the language text into the control table database and central object database.

You use this procedure when running Workbench in attended mode, or if a task break is set before Control Table Workbench.

Configuring Control Tables

To configure your control tables:

1. On Control Table Workbench, *Release 9.2* displays all control table merges in the detail area.



Environment Name	Table Name	Detail Status	Status Description	Program Name	Version	Cnv. Seq.
PD920	F9200	30	Validated	R989200P	XJDE0001	25
PD920	F0004	30	Validated	R9600042	XJDE0001	45
PD920	F9000	30	Validated	R9690002	XJDE0001	55
PD920	F98800	30	Validated	R98800	XJDE0001	56
PD920	F98950	30	Validated	R9898950	XJDE0001	60
PD920	F91100	30	Validated	R96911002	XJDE0001	70
PD920	F91400	30	Validated	R96914002	XJDE0001	75
PD920	F91500	30	Validated	R96915002	XJDE0001	80
PD920	F951000	30	Validated	R96951002	XJDE0001	85
PD920	F95600	30	Validated	R96956002	XJDE0001	86
PD920	F95620	30	Validated	R96956202	XJDE0001	87

If you are installing an alternate language, on the Control Table Workbench form, the Plan Name field will contain the name of your language plan.

2. If you want to do one merge at a time, choose the appropriate grid row, then click Merge. Otherwise, choose Merge All from the Form menu.

   For an explanation on merges, see Chapter 9, "Performing Merges".
3. The system displays all control table merges in the detail area.
4. Select Merge All from the Form menu.
5. When running Installation Workbench in unattended mode, a task break automatically occurs after Control Table Workbench, and before Table Conversions.

   After each merge finishes, verify the output of the report produced. Refer to *Working with Reports* for more detailed information.

Understanding Table Conversions

Table Conversion Workbench runs the table conversions that convert technical and application tables to the new format for *Release 9.2* . It updates the F98405 table to indicate completion, and writes a conversion log record to the F984052 table for each conversion.

Use the following procedures when running Workbench in attended mode or if a task break is set before Table Conversion Workbench.

All users must run the table conversions that appear in the *Release 9.2* Table Conversion Workbench.

Tip: You can safely ignore GT98DSA and GT98DSB errors reported in R8900165_XJDE0001.

Note: If you have chosen to run TCs on the Enterprise Server (the default), the following TCs will still run on the Deployment Server:

- Any TC below sequence 100
- Any TC with the Run On Deployment Server flag turned on

  The Data Message column is a flag that tells the TC Workbench NOT to check the table to see if it is already in the target format. For other TCs, the workbench will not run the Table Conversion if the table is already converted.

This section discusses:

- Running Table Conversions
- Table Conversion Workbench Architecture
- Configuring Table Conversions to Run on the Enterprise Server
- Verifying the Table Conversion Process
- Deferring Index Builds During Table Conversion Workbench

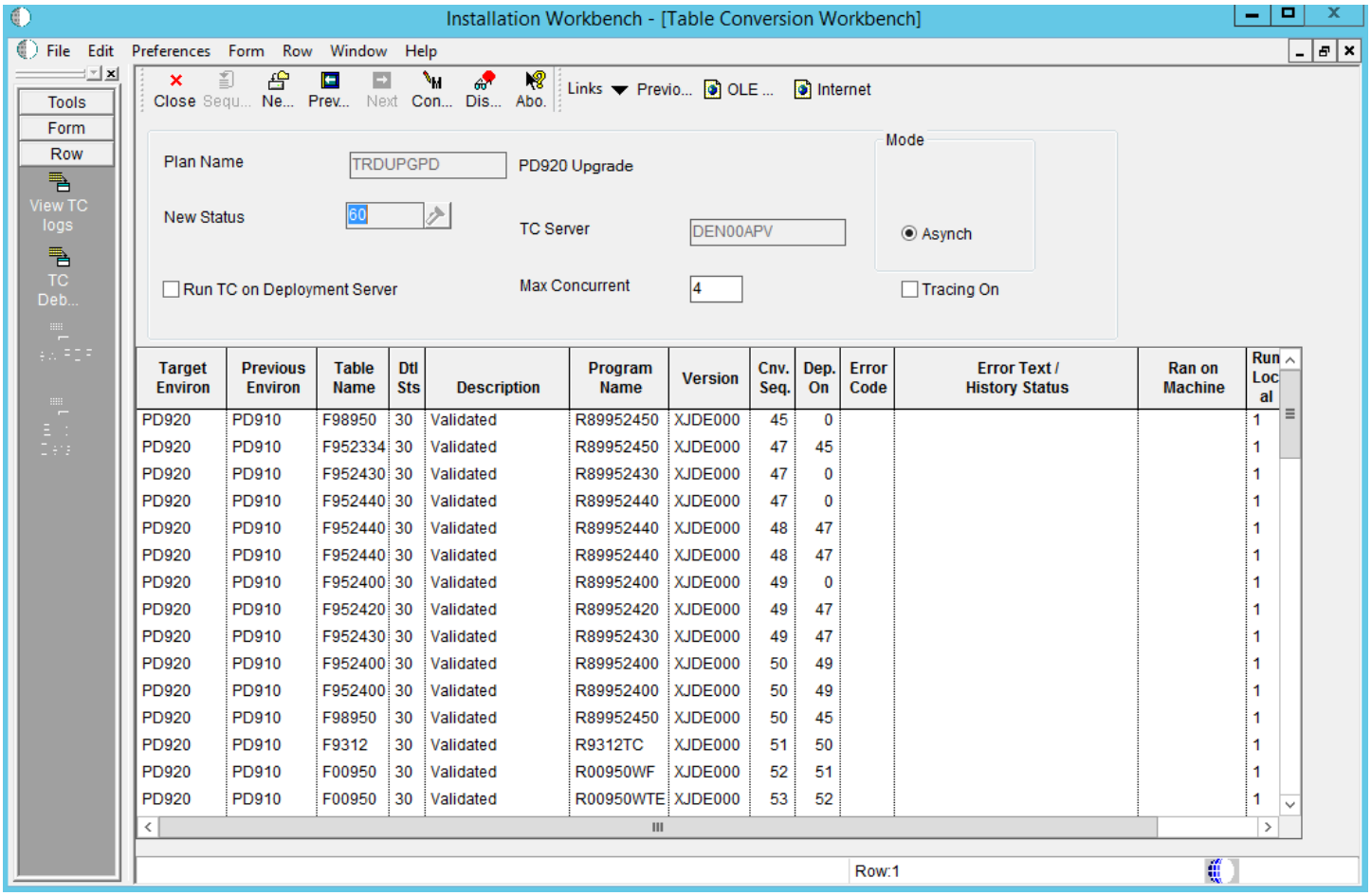
Running Table Conversions

Note: During your upgrade you may choose to defer index builds for very large tables, for tables that are converted several times during the Table Conversion Workbench, or if you are planning on a Unicode conversion. For details and instructions on deferring index builds, refer to the subsection in this guide entitled: *Deferring Index Builds During Table Conversion Workbench*.

Note: Under certain conditions some Table Conversions may be marked as having already been run. Refer to *Understanding UDO Table Conversions*.

To run table conversions:

1. If it is not already open, open Installation Workbench, double-click your plan on Work with Installation Plan, and click Next until Table Conversion Workbench appears.



Target Environ	Previous Environ	Table Name	Dtl Sts	Description	Program Name	Version	Cnv. Seq.	Dep. On	Error Code	Error Text / History Status	Ran on Machine	Run Local
PD920	PD910	F98950	30	Validated	R89952450	XJDE000	45	0				1
PD920	PD910	F952334	30	Validated	R89952450	XJDE000	47	45				1
PD920	PD910	F952430	30	Validated	R89952430	XJDE000	47	0				1
PD920	PD910	F952440	30	Validated	R89952440	XJDE000	47	0				1
PD920	PD910	F952440	30	Validated	R89952440	XJDE000	48	47				1
PD920	PD910	F952440	30	Validated	R89952440	XJDE000	48	47				1
PD920	PD910	F952400	30	Validated	R89952400	XJDE000	49	0				1
PD920	PD910	F952420	30	Validated	R89952420	XJDE000	49	47				1
PD920	PD910	F952430	30	Validated	R89952430	XJDE000	49	47				1
PD920	PD910	F952400	30	Validated	R89952400	XJDE000	50	49				1
PD920	PD910	F952400	30	Validated	R89952400	XJDE000	50	49				1
PD920	PD910	F98950	30	Validated	R89952450	XJDE000	50	45				1
PD920	PD910	F9312	30	Validated	R9312TC	XJDE000	51	50				1
PD920	PD910	F00950	30	Validated	R00950WF	XJDE000	52	51				1
PD920	PD910	F00950	30	Validated	R00950WTE	XJDE000	53	52				1

2. To override where the Table Conversions will be run, click on Run TC on Deployment Server.
3. To change how many Table Conversions are submitted simultaneously to the Enterprise Server, change the value in TC Throttle. This value should match the maximum jobs set up for the QBATCH queue on the Enterprise Server. You control how many TCs are actually running at any time by your queue set up by using WRKJOBQE.

On your *IBM i* machine, make sure JOBQ MAX ACT is set to match the TC Throttle that you choose.

> **Tip:** To set the maximum number of simultaneous jobs submitted, refer to *Select Enterprise Server and Maximum Jobs On Select Environments - Advanced Exit*.

4. Select Convert All from the Form menu.

> **Tip:** To do one conversion at a time, select the appropriate detail records, and then select Convert Selected from the Form menu. While the conversions run, you can track their progress by choosing Table Conversion\Merge Log (P984052). To do so, on the System Installation Tools menu (GH961), double-click Advanced Operation, and then Table Conversion\Merge Log. The program shows a scrolling list of the conversions that have processed.

Table Conversion Workbench Architecture

Select Convert All (this is used automatically when running unattended) or Convert Selected to run the TC Workbench program (P98413).

The Convert All selection causes the program to run with two loops. The outer loop keeps running until there are no more TCs to run, and there are no more TCs in a running status. The inner loop runs through the F98405 table looking for all TCs at a status less than 60. As it reads each new record, it then checks to see if there are any TCs waiting at status 35 for dependencies. It first tries to run those (checks again if their dependencies are satisfied), before trying to run the new TC that it just read.

The Technical TCs (those that are at conversion sequence < 100) run one at a time. For TCs above sequence 100, Convert All uses the maximum batch jobs specified in the Plan (4 by default), meaning it submits up to that number of TCs at once. You control how many are actually running at any time by your queue set up by using the P986130 program. The default setup is four (4) batch jobs at once. Selecting Convert All submits 4, then loops waiting for a job to end and submits the next job. If you set your queue to a number larger than 4, only 4 are submitted at a time.

For each TC it tries to submit, it first checks whether that TC has dependencies and checks the status of those dependencies. If any of the dependencies is still running (status 45), this TC is changed to status 35 (waiting for dependencies).

The Convert Selected option can be used to submit several TCs at once and keeps looping till they are submitted. It does not keep looping till they have run. Press Find to see if they are done.

The P98413 program monitors and updates the F98405 table, which is maintained locally in JDEPLAN. The TCs update the F984052 table, which is maintained in *System - 920* . At any point in time, there are records in the F98405 table at status 45 for TCs that actually have completed. The TC Workbench calls a business function at various points in its loop, which compares the F984052 and F98405 table, and updates the status in the F98405 to completed (60) or failed (50). If the TC Workbench fails (for example, you cancel out of it), go into the Custom Plan application and drill down into your TCs, and press Find. This synchronizes the F98405 table with the F984052 table. Clicking the Find button on the TC Workbench also synchronizes the F98405 and F984052 tables.

If the Enterprise Server fails while running the TC Workbench, you may have up to 4 jobs at status 45 (running), even though they may have failed. Follow the instructions in the write-up on restarting the TC Workbench, to get everything back into sync. (Remember the Find button on the Custom Plans [Table Conversions] synchronizes the F98405 with F984052 tables.) If a TC actually fails on the server (for example, you cancel the job) it will never get as far as updating the F984052 table, and the process is not able to update the F98405 table correctly. Selecting either Convert Selected or Convert All, does not re-submit anything that is at status 45. When restarting the TC Workbench, you need to resolve

manually whether any of the jobs at status 45 are still running, and set the status back to 30 or 50 if you want the TC Workbench to re-submit them.

All the Table Conversions have the same job name, which is R98405A. When looking in the `jde.log` for that job, there is a message stating which TC is running.

Configuring Table Conversions to Run on the Enterprise Server

There are three settings that control the location for running Table Conversions. These are:

- *Table Conversion Schedule*
- *Upgrade Plan Definition*
- *Select Enterprise Server and Maximum Jobs On Select Environments - Advanced Exit*
- *Configuring Queues*
- *Starting Table Conversions*
- *Monitoring Table Conversions*
- *Working With Table Conversion Log Files*
- *Stopping Table Conversions*
- *Restarting Installation Workbench*

Table Conversion Schedule

When the table conversions are scheduled using *JD Edwards EnterpriseOne* , schedule owners decide whether their conversions can run on the Enterprise Server. If not, then the Run TC on Deployment Server option is selected. Most conversions can run on the Enterprise Server. Table conversions that cannot include Technical Conversions (sequence < 100), UBEs, and cross-data source conversions (for example, printers, user preferences). The Table Conversion Schedule is accessed through the Advanced Operations Menu (GH9611).

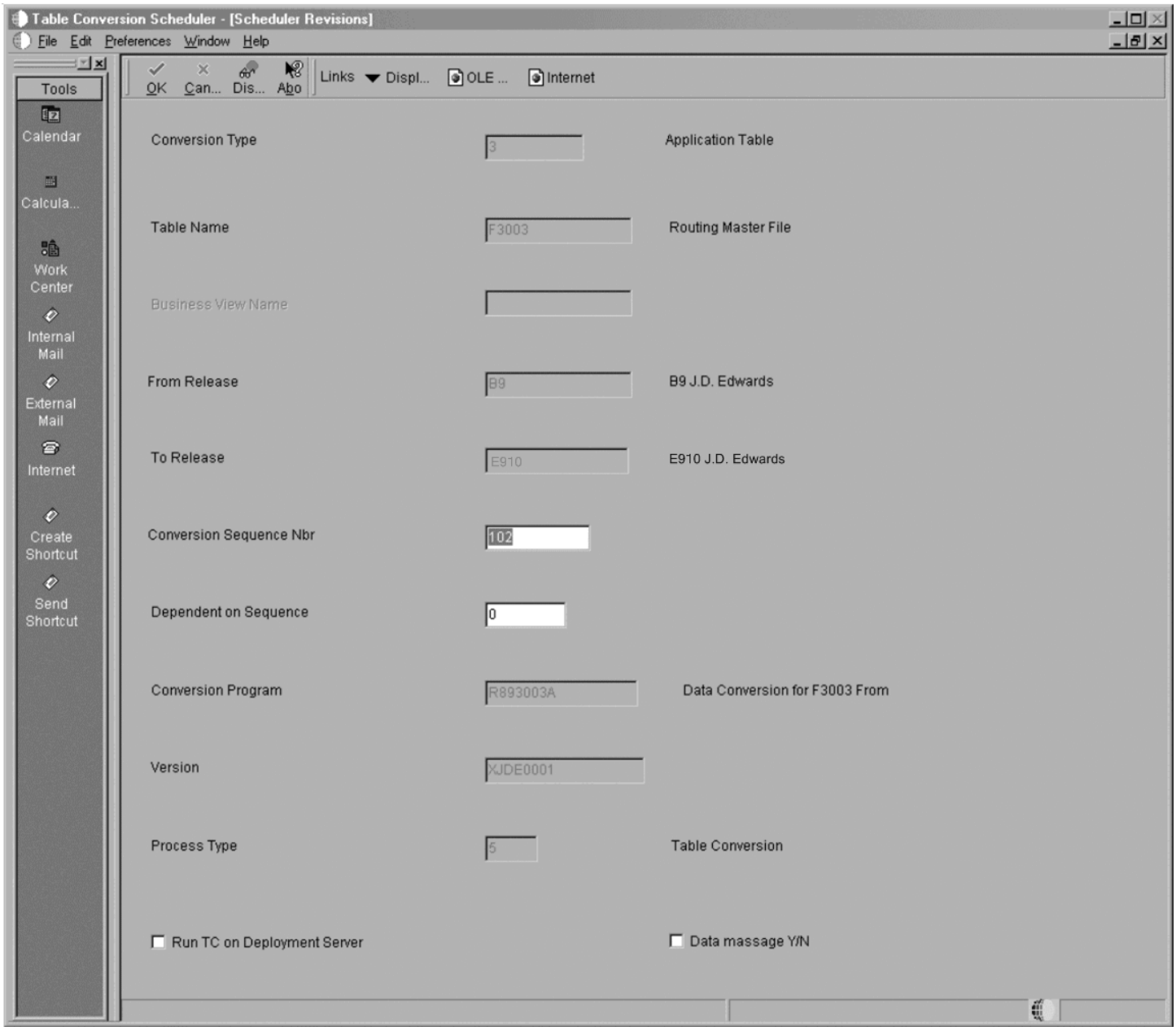
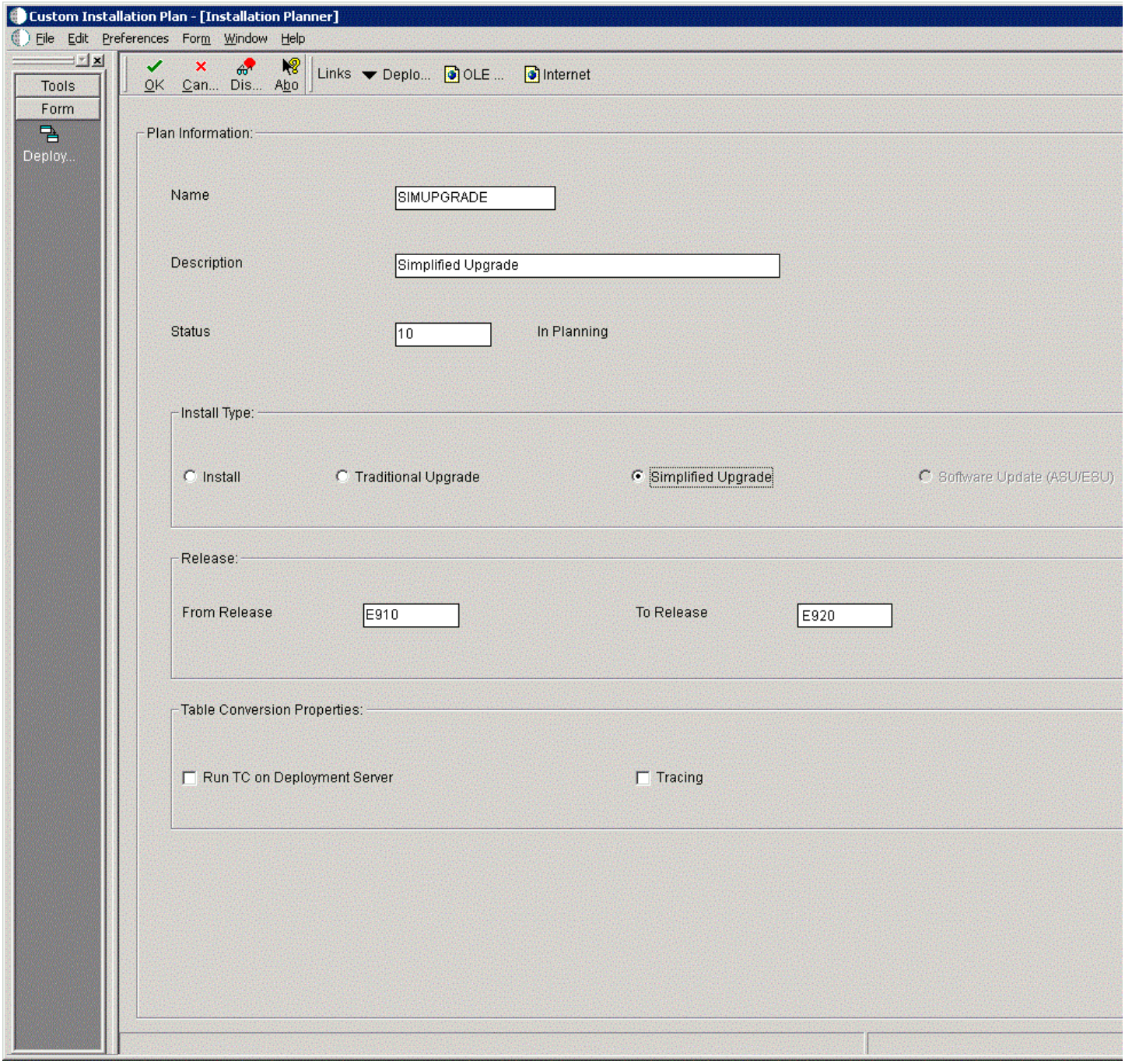


Table Conversion Scheduler - [Scheduler Revisions]
File Edit Preferences Window Help
Tools
Calendar
Calcula...
Work Center
Internal Mail
External Mail
Internet
Create Shortcut
Send Shortcut
OK Can... Dis... Abo
Links Displ... OLE ... Internet
Conversion Type
3
Application Table
Table Name
F3003
Routing Master File
Business View Name
From Release
B9
B9 J.D. Edwards
To Release
E910
E910 J.D. Edwards
Conversion Sequence Nbr
102
Dependent on Sequence
0
Conversion Program
R893003A
Data Conversion for F3003 From
Version
XJDE0001
Process Type
5
Table Conversion
Run TC on Deployment Server
Data massage Y/N

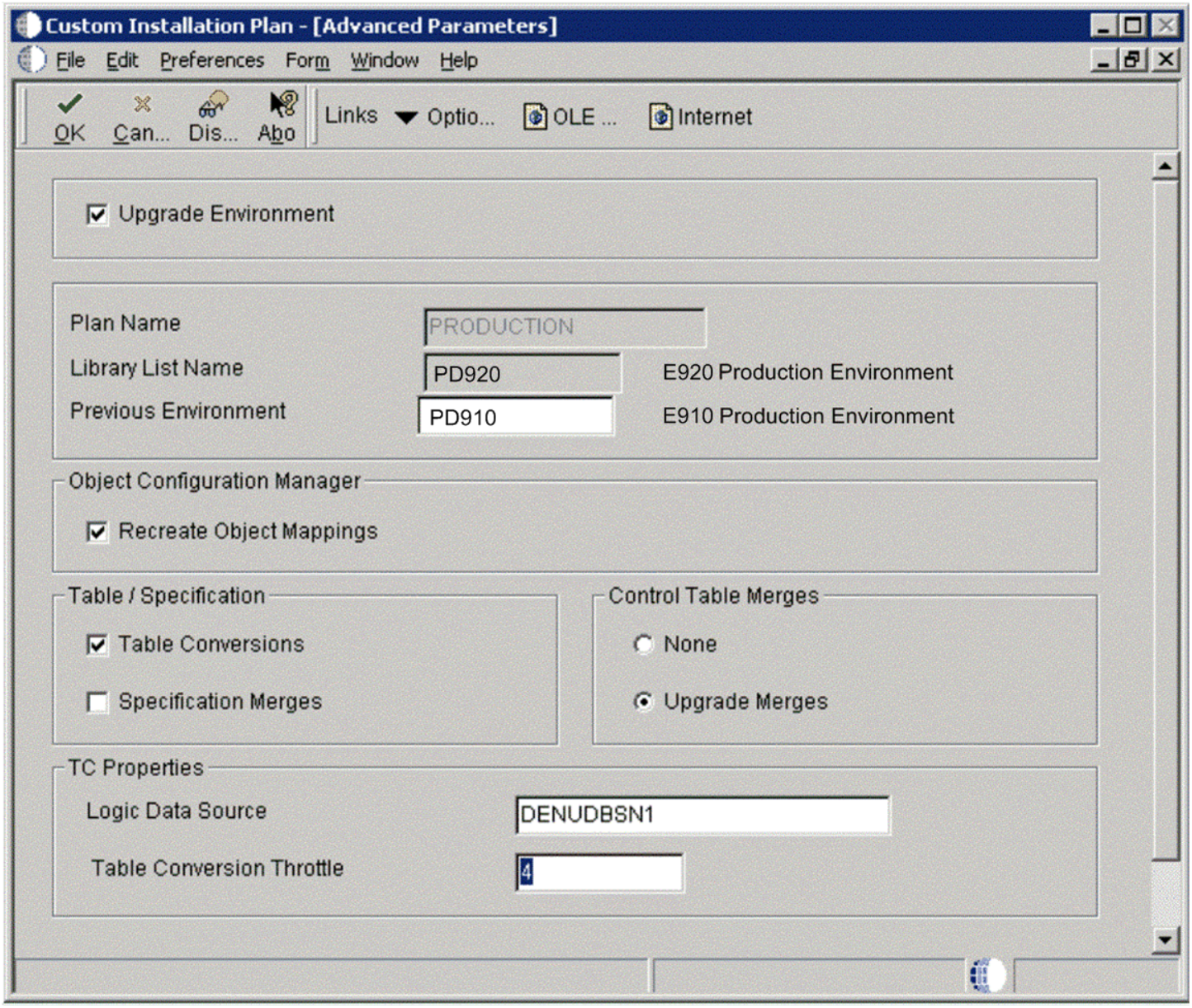
Upgrade Plan Definition

It is not required to run table conversions on an Enterprise Server. The main advantage to doing so is performance. If you have a small database you may decide to run them on the Deployment Server by selecting Run TC on Deployment Server when defining your plan. The default is to run conversions on the Enterprise Server.


Custom Installation Plan - [Installation Planner]
File Edit Preferences Form Window Help
Tools
Form
Deploy...
OK
Can...
Dis...
Abo
Links
Deplo...
OLE ...
Internet
Plan Information:
Name
SIMUPGRADE
Description
Simplified Upgrade
Status
10
In Planning
Install Type:
Install
Traditional Upgrade
Simplified Upgrade
Software Update (ASU/ESU)
Release:
From Release
E910
To Release
E920
Table Conversion Properties:
Run TC on Deployment Server
Tracing

Select Enterprise Server and Maximum Jobs On Select Environments - Advanced Exit

After selecting an environment on Select Environments, select Advanced on the Form menu to access Advanced Parameters. Select the logic data source for the Enterprise Server where table conversions will be run for that environment. If you do not follow these steps, Installation Planner will select a default Enterprise Server. The port number is specified in the Deployment Server `JDE.INI` . Also on Advanced Parameters, you can override the maximum jobs for the default job queue on the Enterprise Server.


Custom Installation Plan - [Advanced Parameters]
File Edit Preferences Form Window Help
OK Can... Dis... Abo
Links Optio... OLE ... Internet
Upgrade Environment
Plan Name
PRODUCTION
Library List Name
PD920
E920 Production Environment
Previous Environment
PD910
E910 Production Environment
Object Configuration Manager
Recreate Object Mappings
Table / Specification
Table Conversions
Specification Merges
Control Table Merges
None
Upgrade Merges
TC Properties
Logic Data Source
DENUDBSN1
Table Conversion Throttle
4

Configuring Queues

The job queues (GH9013) are implemented in the queue kernel. During the Initial Tasks Workbench, the Release Master copies the default queue set up during the plan to the Enterprise Server job queue table.

On your *IBM i* , make sure you set up QBATCH to match the TC Throttle you set in the plan. You must also select a Queue Type of iSeries and use *IBM i* tools to configure the queue (CHGJOBQE).

Starting Table Conversions

To start Table Conversions, run Installation Workbench. If you are in Unattended Mode, a task break is displayed before Table Conversion Workbench reminding you to set up your Enterprise Server. If you press Stop on the task break, you will need to press the Convert All exit to start the conversions.

When running conversions on the Deployment Server, the R98405 program is launched and runs all conversions, producing a report when complete.

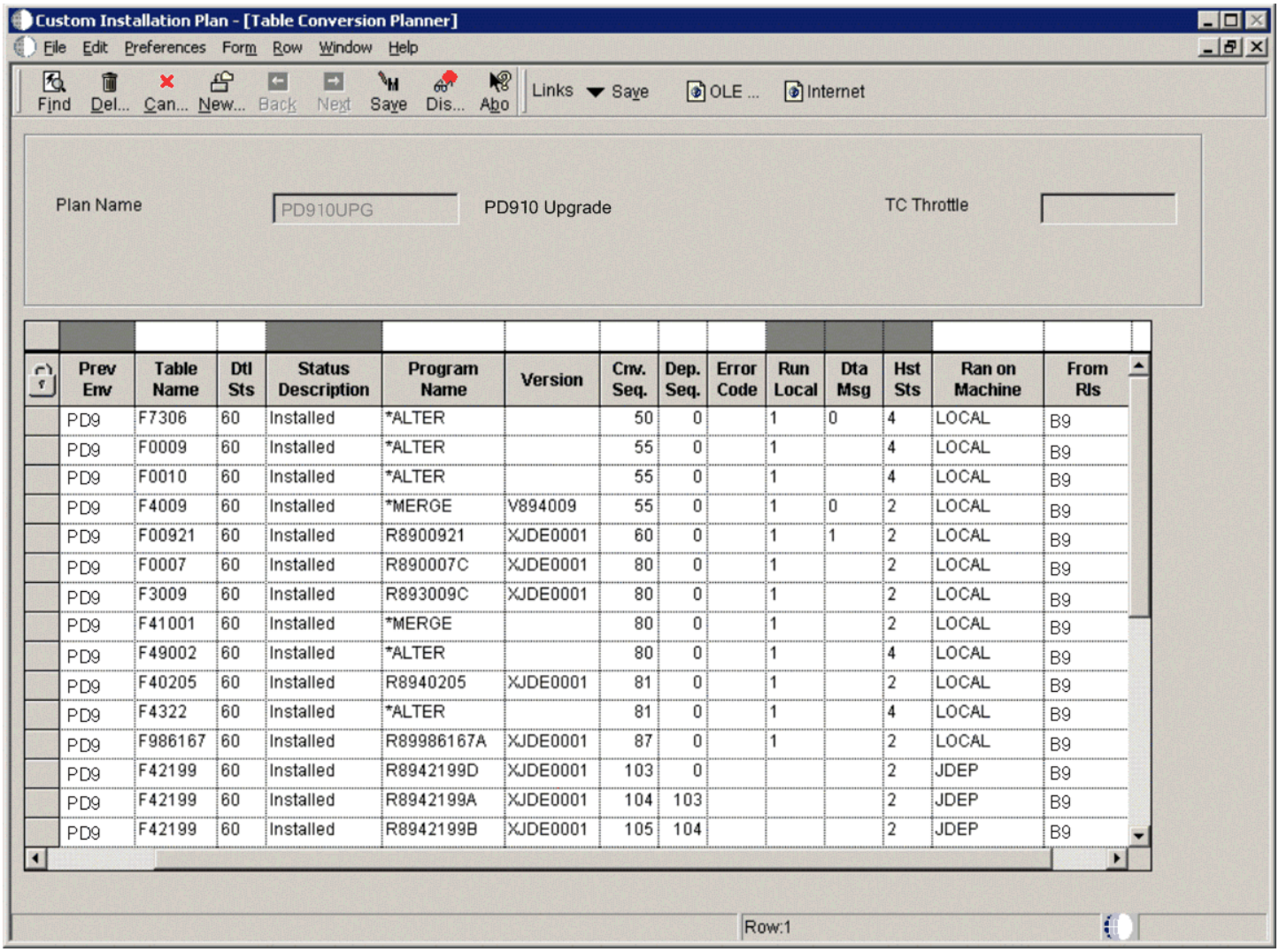
When running conversions on the Enterprise Server, Table Conversion Workbench launches a R98405A program for each conversion including any conversions that run locally. This is the UBE that is displayed in Submitted Reports (GH9011). When all conversions are complete, the R984052 program produces a report.

Monitoring Table Conversions

Table Conversion Workbench implements a throttling mechanism to control conversions. If conversions are run on the Deployment Server, it launches one conversion at a time. If conversions are run on the Enterprise Server, it looks up the maximum number of batch jobs in the queue table and submits that many conversions at a time. Either way, technical conversions are always throttled to 1. The list of submitted conversions can be seen in Table Conversion Planner.

1. Go to the System Installation Tools menu (GH961)
2. Open Typical Installation Plan or Custom Installation Plan.
3. Click Find.
4. Expand the plan. Drill down to Environments, Environment Name, Table Conversions.
5. Highlight the Table Conversions node and click Select.
6. Enter **45** into the Detail Status QBE.

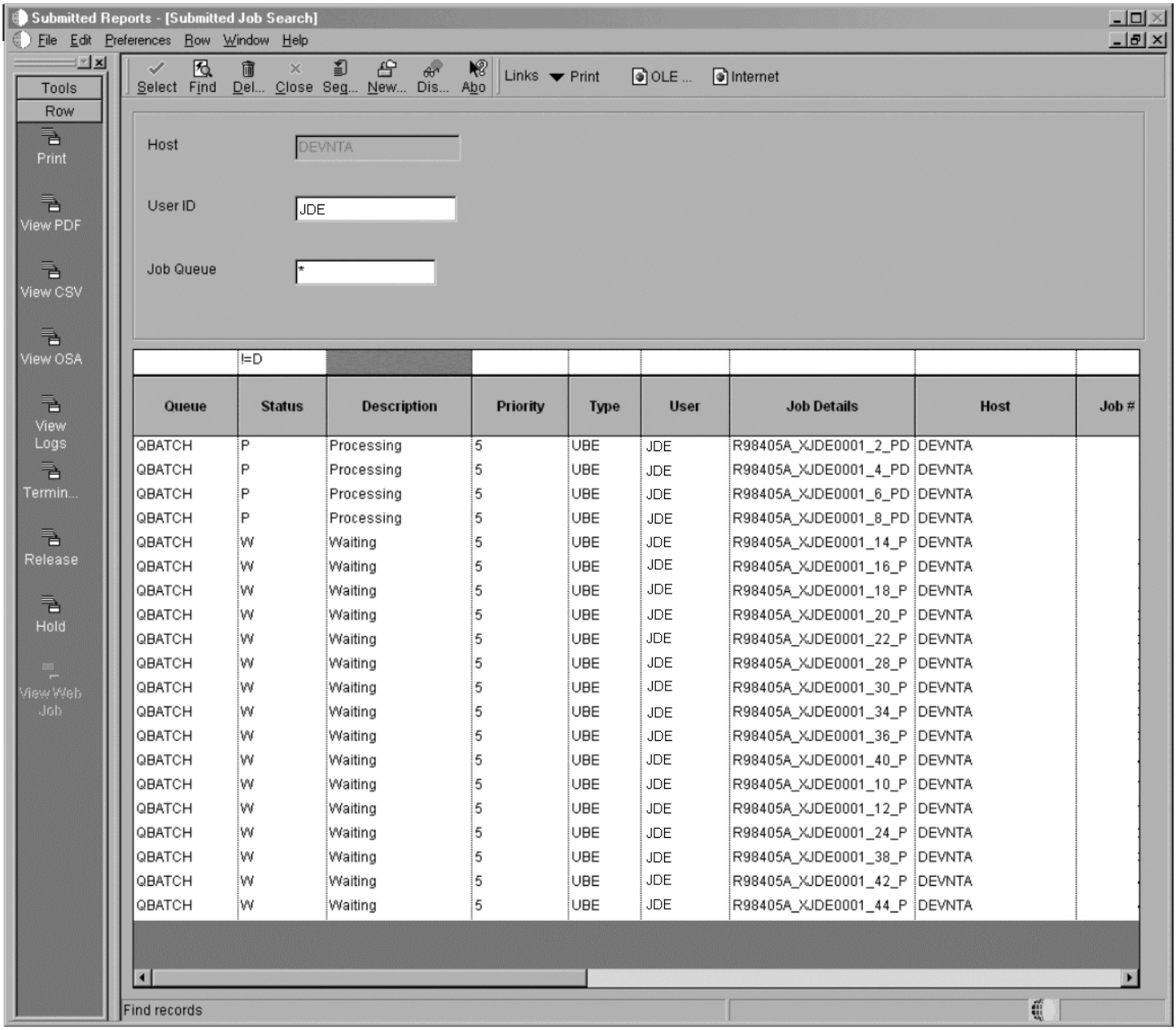
7. Click Find.



Prev Env	Table Name	Dtl Sts	Status Description	Program Name	Version	Cnv. Seq.	Dep. Seq.	Error Code	Run Local	Dta Msg	Hst Sts	Ran on Machine	From Rls
PD9	F7306	60	Installed	*ALTER		50	0		1	0	4	LOCAL	B9
PD9	F0009	60	Installed	*ALTER		55	0		1		4	LOCAL	B9
PD9	F0010	60	Installed	*ALTER		55	0		1		4	LOCAL	B9
PD9	F4009	60	Installed	*MERGE	V894009	55	0		1	0	2	LOCAL	B9
PD9	F00921	60	Installed	R8900921	XJDE0001	60	0		1	1	2	LOCAL	B9
PD9	F0007	60	Installed	R890007C	XJDE0001	80	0		1		2	LOCAL	B9
PD9	F3009	60	Installed	R893009C	XJDE0001	80	0		1		2	LOCAL	B9
PD9	F41001	60	Installed	*MERGE		80	0		1		2	LOCAL	B9
PD9	F49002	60	Installed	*ALTER		80	0		1		4	LOCAL	B9
PD9	F40205	60	Installed	R8940205	XJDE0001	81	0		1		2	LOCAL	B9
PD9	F4322	60	Installed	*ALTER		81	0		1		4	LOCAL	B9
PD9	F986167	60	Installed	R89986167A	XJDE0001	87	0		1		2	LOCAL	B9
PD9	F42199	60	Installed	R8942199D	XJDE0001	103	0				2	JDEP	B9
PD9	F42199	60	Installed	R8942199A	XJDE0001	104	103				2	JDEP	B9
PD9	F42199	60	Installed	R8942199B	XJDE0001	105	104				2	JDEP	B9

Use Submitted Reports (GH9011) to view the status of submitted conversions. Notice all the jobs show the R98405A program. To link the jobs to conversions, note the job number. The jde.log, jdedebug.log, and

conversion log all have the job number in the name. The jde.log contains a message with the conversion name. For more on the log files, see the section below.


Submitted Reports - [Submitted Job Search]
File Edit Preferences Row Window Help
Tools
Row
Print
View PDF
View CSV
View OSA
View Logs
Termin...
Release
Hold
View Web Job
Select Find Del... Close Seg... New... Dis... Abo
Links Print OLE ... Internet
Host DEVNTA
User ID JDE
Job Queue *
I=D
Queue Status Description Priority Type User Job Details Host Job #
QBATCH P Processing 5 UBE JDE R98405A_XJDE0001_2_PD DEVNTA
QBATCH P Processing 5 UBE JDE R98405A_XJDE0001_4_PD DEVNTA
QBATCH P Processing 5 UBE JDE R98405A_XJDE0001_6_PD DEVNTA
QBATCH P Processing 5 UBE JDE R98405A_XJDE0001_8_PD DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_14_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_16_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_18_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_20_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_22_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_28_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_30_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_34_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_36_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_40_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_10_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_12_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_24_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_38_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_42_P DEVNTA
QBATCH W Waiting 5 UBE JDE R98405A_XJDE0001_44_P DEVNTA
Find records

Server Manager can be used to monitor processes and queues, and view **JDE.LOG, jde.log, ,JDEDEBUG.LOG, jdedebug.log, ,** and ***JDE.INI jde.ini .***

Platform-specific utilities such as Task Manager WRKACTJOB ps can also be used to monitor the conversions.

Database Specific Queries that query unconverted tables, temp tables, converted tables, and database system tables can be helpful in monitoring conversions.

Working With Table Conversion Log Files

The log files are stored in these specific locations:

- The **jde_ProcessId.log** and **jdedebug_ProcessId.log** are stored in **JDEdwardsE920\Logs /JDEdwards/E920/logs** while the conversion is running.

  Once the conversion has finished, the logs are moved to **JDEdwardsE920\PrintQueue /JDEdwards/E920/printqueue** and renamed to these names:

  R98405A_XJDE0001_EnterpriseOne_Job_Number_PDF.jde.log

  R98405A_XJDE0001_EnterpriseOne_Job_Number_PDF.jdedebug.log

- The **JDE_ *IBM i* _Job_Number.LOG** and **JDEDEBUG_ *IBM i* _Job_Number.LOG** are stored in **\E920**.
- The conversion logs are stored in the **Printqueue** directory. The log will be named one of the following:
  - **Report_Version_Ddate_Ttime_Jjob_number.log**
  - **Table_ALTERTABLE_Ddate_Ttime_Jjob_number.log**
  - **Table_MERGETABLE_Ddate_Ttime_Jjob_number.log**
- The directory for the printqueue is **Oracle\ *E920* \PrintQueue Oracle/ *E920* /printqueue \ *E920* SYS\PrintQueue**

INI Settings

- [DEBUG]

  ;Turn off jdedebug.log, set to FILE to turn on jdedebug.log

  Output=NONE

  ;Turn on jde.log, set to 0 to turn off jde.log

  LogErrors=1

  ;Do not send logging info to client, set to 1 to send logging info to client (not recommended)

  ClientLog=0
- [JDENET]

  ;Turn off JDENET tracing. Set to 1 to turn on JDENET tracing.

  netTrace=0

- [TCENGINE]

  ;Turn on minimal table conversion tracing. Set to 0 to turn off tracing (not recommended). Set to 10 for maximum tracing (useful for troubleshooting).

  TraceLevel=1

Note: There is a possibility that there may be invalid errors in the JDE.log. You can ignore any error along the lines that read: No rounding record found in table *tablename* - *datasource* where *tablename* is the name of the table and *datasource* is the name of the datasource.

Tip: You can run the TC verification report prior to running spec merge to ensure tables are in the correct format. Refer to *Compare Tables and Indexes Against Central Objects or TAM Specifications (R9698711)* in the chapter entitled: *Working with Reports*.

Stopping Table Conversions

To stop table conversions:

1. Close Workbench.
2. On the Deployment Server, open Task Manager (press Ctl+Alt+Del and choose Task Manager).
3. On the Applications tab, select Installation Workbench and click End Task.
4. Locate waiting jobs from Submitted Reports (GH9011) by entering **W** in Status QBE and clicking Find.
5. Highlight any row you wish to delete and click Delete.

   All conversions should now be stopped. There are several more steps involved with cleaning up the database and resetting Table Conversion Workbench. You may choose to leave one or more table conversions running but close Installation Workbench and restart the remaining conversions. See *Restarting Installation Workbench*.

   Note: Installation Workbench should not be closed if Table Conversions are running normally. Only close it if problems have occurred and conversions need to be restarted.

Restarting Installation Workbench

When you restart Installation Workbench, these items create a temporary table in the new format:

- Temp tables (used for in-place table conversions)
- Alter conversions
- Merge conversions

The temporary table is named *TableName*TCTEMP. If you are restarting a conversion, first verify the original table was not dropped, then drop the temp table. For a Table Conversion, the base table must be in the old format. For Alter and Merge Conversions, no further action is necessary.

For performance reasons, several conversions use their own temporary table that has been defined in the specifications. The recovery for each of these may be different.

To rerun a conversion, reset the status of the conversion in Table Conversion Planner from 35, 45, or 50 to 30. If a conversion is still running when workbench is restarted, leave its status at 45.

Troubleshooting Table Conversions

If Table Conversion Workbench fails to submit a conversion to the server, such as services are not running, it sets the conversion status to 50 and it does not submit any more conversions.

Enabling the Print UBE Job Log

When you are upgrading, the Print UBE job log on your *IBM i* Enterprise Server can help you debug any potential Table Conversion problems. For example, if you are trying to insert alpha data into a numeric column your Table Conversion will fail and you can only isolate the problem by analyzing the Print UBE job log.

By default, the Platform Pack installer configures these `JDE.INI` settings on your Enterprise Server, which enable the Print UBE job log:

```
[AS400]
PrintUBEJoblog=TRUE
PrintUBEJoblogOnError=TRUE
```

Note: You can set these values to `FALSE` once you have completed your upgrade.

General Problems

This section describes these general problems:

- *TC Has No Saved Input Table Specs*
- *TC Input Table Does Not Exist*
- *Unable to Submit TC to Server*
- *Unknown Table Conversion Error*
- *Unknown Error TC Input Checking*
- *Conversion Program Failed*
- *Conversion Has Unprocessed Dependencies*
- *Default Environment Missing on Server*
- *Inconsistent Queue Definitions*
- *Invalid TC Max Jobs in Plan*
- *Security Server Turned On*
- *Services Inactive, Cannot Run on Server*
- *Submission Problems*

TC Has No Saved Input Table Specs

This error indicates that the table conversion cannot be run from the Table Conversion Workbench because it does not have saved input table specifications. To resolve the error, you must either fix the table conversion using TC Design Aid or run it from batch versions.

TC Input Table Does Not Exist

This error indicates that the table conversion cannot be run because the input table does not exist. This problem can be caused by DBMS or host operating system security issues. Use these steps to resolve the issue:

1. The table that is being reported as missing is the input table for the specified table conversion.Usually the missing table is the based-on table in the TC Schedule, but in some cases it is not.

2. Check the `jde.log` and your security setup in the DBMS to determine whether this is a security issue. If so, take corrective actions.
3. If this is not a security issue, you must determine why the table is missing and whether you have a business purpose for this particular table conversion to be run.

Unable to Submit TC to Server

This error may occur when you choose to run your TCs on the Enterprise Server but the TC Workbench was unable to submit the TC to the server. You should check to ensure the *JD Edwards EnterpriseOne* services on the Enterprise Server are up and running. Also check the logs on the Enterprise Server.

Unknown Table Conversion Error

The error occurs when the table conversion shell UBE (R98405A) to due to an unknown error. If you ran the table conversion locally, check the `jde.log` and the table conversion log (if it exists). If you ran the table conversion on the Enterprise Server, check the logs on that machine.

If you cannot locate any special re-run instructions for this table-conversion, use these procedures to resolve:

1. Correct the problems that caused the failure.
2. Restore tables if necessary.
3. Drop the temporary table (FTCTEMP) if necessary.
4. Re-run the process.

Unknown Error TC Input Checking

This error occurs when the Table Conversion Workbench checks the input table against the saved input table specifications in the table conversion and it encounters an unknown error. As a result, the table conversion was marked as failed. Check the `jde.log` to diagnose this error.

Conversion Program Failed

This error occurs when a scheduled table conversion program did not complete successfully. If you ran the table conversion locally, checked the `jde.log` and the TC Engine log (if it exists). If you ran the table conversion on the Enterprise Server, check the R98405A log and the TC Engine log on the server.

If you cannot locate any special re-run instructions for this table-conversion, use these procedures to resolve:

1. Correct the problems that caused the failure.
2. Restore tables if necessary.
3. Drop the temporary table (FTCTEMP) if necessary.
4. Re-run the process.

Conversion Has Unprocessed Dependencies

This error occurs when a conversion program could not be launched because it is dependent on other scheduled conversion programs which did not run to successful completion. You must correct the errors for the conversion program on which this conversion is dependent. You must either run Convert All or run the dependency conversion and then run this conversion. If you choose Convert All, it will automatically retry this table conversion.

Default Environment Missing on Server

This error occurs if your Upgrade Plan indicates to run table conversions on the server and the default environment defined in the server `JDE.INI` file has not been installed on your server. For example, *JD Edwards EnterpriseOne* includes this default setting in the `JDE.INI` on your Enterprise Server:

```
[SERVER ENVIRONMENT MAP]
JDEPLAN=PSnnn
```

where *nnn* is the *JD Edwards EnterpriseOne* application release level. For example, *920* . Ensure that the specified environment exists.

Inconsistent Queue Definitions

This error occurs if your Upgrade Plan indicates to run table conversions on the server and the default queue defined in Queue Control Status Master (F986130) in JDEPlan does not exist in the Queue Control Status Master on the Enterprise Server. To resolve the error condition, perform either of these steps:

1. Change the default queue defined in the planner environment to match the queue that is defined on the server.
2. Sign in to the Deployment Environment (for example, DEP *920*), or a deployed development client, and add a queue definition on the server to match the default queue that is defined in the Planner environment.

In either case, you must run application P986130 to update the table.

> **Note:** This error may also be generated by a failure to open the Queue table in the System datasource. Use to the `jde.log` to verify if this is the case.

Invalid TC Max Jobs in Plan

This error indicates your plan has specified the maximum table conversion job as 0 while the Table Conversion Workbench is assuming the maximum jobs are set to 4.

Security Server Turned On

This error indicates you have turned on the Security Server in the `JDE.INI` file on the Deployment Server, Enterprise Server, or both. As previously stated, you cannot run Table Conversions with the Security Server turned on. Refer to the `jde.log` for more details.

This setting in the `JDE.INI` indicates whether the Security Server is turned on:

```
[SECURITY}
SecurityServer=value_or_blank
```

In order to turn off the Security Server, the value for the `SecurityServer=` setting must be blank.

Services Inactive, Cannot Run on Server

This error occurs if your Upgrade Plan specifies to run table conversions on the Enterprise Server but the services are not started. You must ensure that the *JD Edwards EnterpriseOne* services on your Enterprise Server are up and running before running table conversions on the server.

Submission Problems

This section discusses troubleshooting submission problems for these tables:

- *F9843 and F9843T*
- *F98405*
- *F984052*
- *F986110*
- *F986130*

F9843 and F9843T

The Table Conversion Schedule (GH9611) application reads these tables to find all conversions that will be run. They are conversion types 3, 31, and 32. Table Conversions that must run on the Deployment Server are flagged here.

These tables reside in the System Local and *System - 920* data sources.

F98405

The Workbench Status (GH961)application reads this table to find table conversion scheduler records (among others) that are copied from F9843 to F98405 during Finalize Plan. The Workbench uses records in this table, which resides in the *Planner - 920* data source..

F984052

The History (GH9611) application uses this table to store table conversion history. A new record is created in this table every time a conversion is launched. The R98405A report writes the status for a completed conversion to this table. Table Conversion Workbench polls this table for completion status and updates the status in the F98405 table.

This table resides in the *System - 920* data source. The table is originally mapped to the OneWorld Planner The B7334 data source. It is copied to the *System - 920* data source and remapped during Release Master. The table must be in the System data source so conversions on the Enterprise Server can communicate their completion status back to Table Conversion Workbench.

F986110

The Submitted Reports (GH9011) application creates records in this table for conversions that are launched on the server. They can be viewed using Submitted Reports. This table resides in the Server Map data source.

F986130

The Job Queues (GH9013) application is used to define job queues that can be used by the Installation Planner in the JDEPLAN environment. If any queues have been defined, they are copied to the system data source during Release Master. If no queues have been defined, Release Master creates default queues in the system data source. The Enterprise Server is mapped to the table in the system data source. The job queues can be viewed by logging into the DEP9 environment and opening the Job Queues application. This table resides in the System - Local and *System - 920* data sources.

Verifying the Table Conversion Process

To verify that the table conversion process completed successfully:

- *Understanding Table Conversion Dependencies*
- *Verifying Table Conversions*
- *Understanding Table Format Verification*
- *Understanding UDO Table Conversions*
- *Rerunning Table Conversion Programs*

For each Table Conversion that runs locally, you will see error messages in `jde.log` similar to the following:

- TAMInitX (*path*\jdeblc.xdb): Error opening index file "*path*\jdeblc.xdb" : The system cannot find the path specified. WinErrNum=3.

  The path name will vary by environment and release, where references to TAM are only applicable to releases prior to Release 8.12, at which point TAM is superceded by Metadata.
- 2248\2420 Thu Dec 26 11:18:36.326 ODBC_U1.C823 ODB0000154 - SQLPrepare failed. Table F00926, ODBC DSN JDE_DEV.

- 2248\2420 Thu Dec 26 11:18:36.326 JDBODBC.C2695 ODB0000027 - JDBODBC_DescribeTable failed. Table F00926.

  The exact syntax varies by database type and environment.
- Because they do not affect the table conversion, you can disregard any error messages for these tables:
  - F00921
  - F00926
  - F98830
  - F9100TCTEMP
- If you receive an error regarding F0092L that table may or may not exist in the previous environment, depending on whether you installed Tools 9.2 in previous environment. This error does not stop the process or register as an error in the Workbench itself.
- The F00950W table is converted when you do the Table Conversions. If you applied Tools 9.2 to the previous environment this table would copy successfully. If you did not it will either be missing or have the wrong format. This error does not stop the process or register as an error in the Workbench itself.

Understanding Table Conversion Dependencies

Table conversions with a conversion sequence number of 99 or below are technical table conversions; conversions with a sequence number of 100 or above are application (business data) conversions. The sequence numbers are shown in the Conv Seq column. Note that application conversions are dependent on technical conversions: all technical conversions must complete successfully for application conversions to complete.

Verifying Table Conversions

Before continuing the upgrade process, verify that the table conversions ran successfully. Run R9698711 from the Deployment Server. Verify that the amount of data in the log file and the converted table are the same.

The report R984052 lists all of the conversions that ran.

Note the following information about the table conversions:

- Conversion programs listed as Process Type 1 generate a `.pdf` and a `.log` file in the `printqueue` directory.
- Conversion programs listed as Process Type 5 generate a `.log` file in the printqueue directory.
- The table conversions shown below are cumulative: for whatever previous version you are upgrading from, the conversions shown in the table are carried out, plus conversions shown in all subsequent tables. For example, if you are upgrading from OneWorld version B73.3, the conversions shown in the first table occur, plus those shown in the subsequent tables.

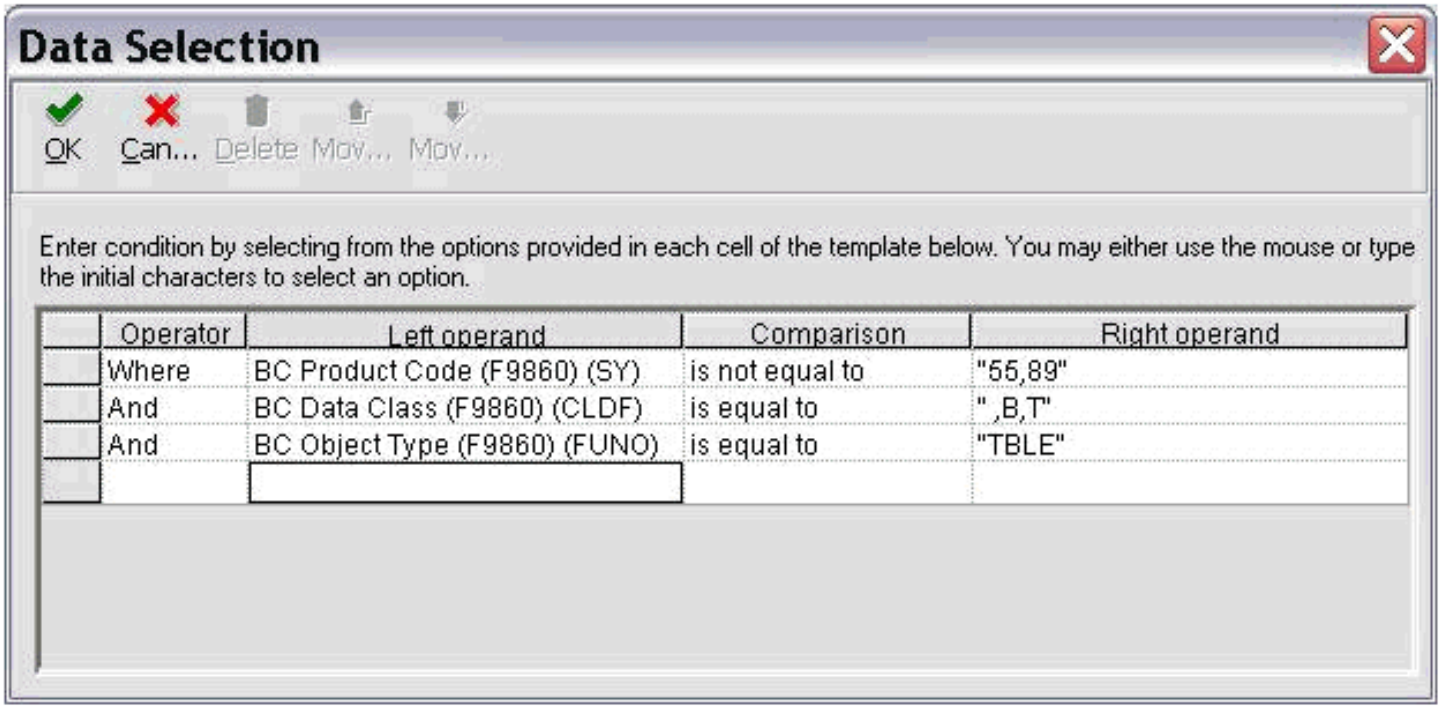
> **Note:** The table F76B0411 is not shipped in Xe base. If you did not apply the localization ASU which contained the table, you will see a status of **TC Inp Spec\Tbl** Mismatch next to this TC. This is normal.

Understanding Table Format Verification

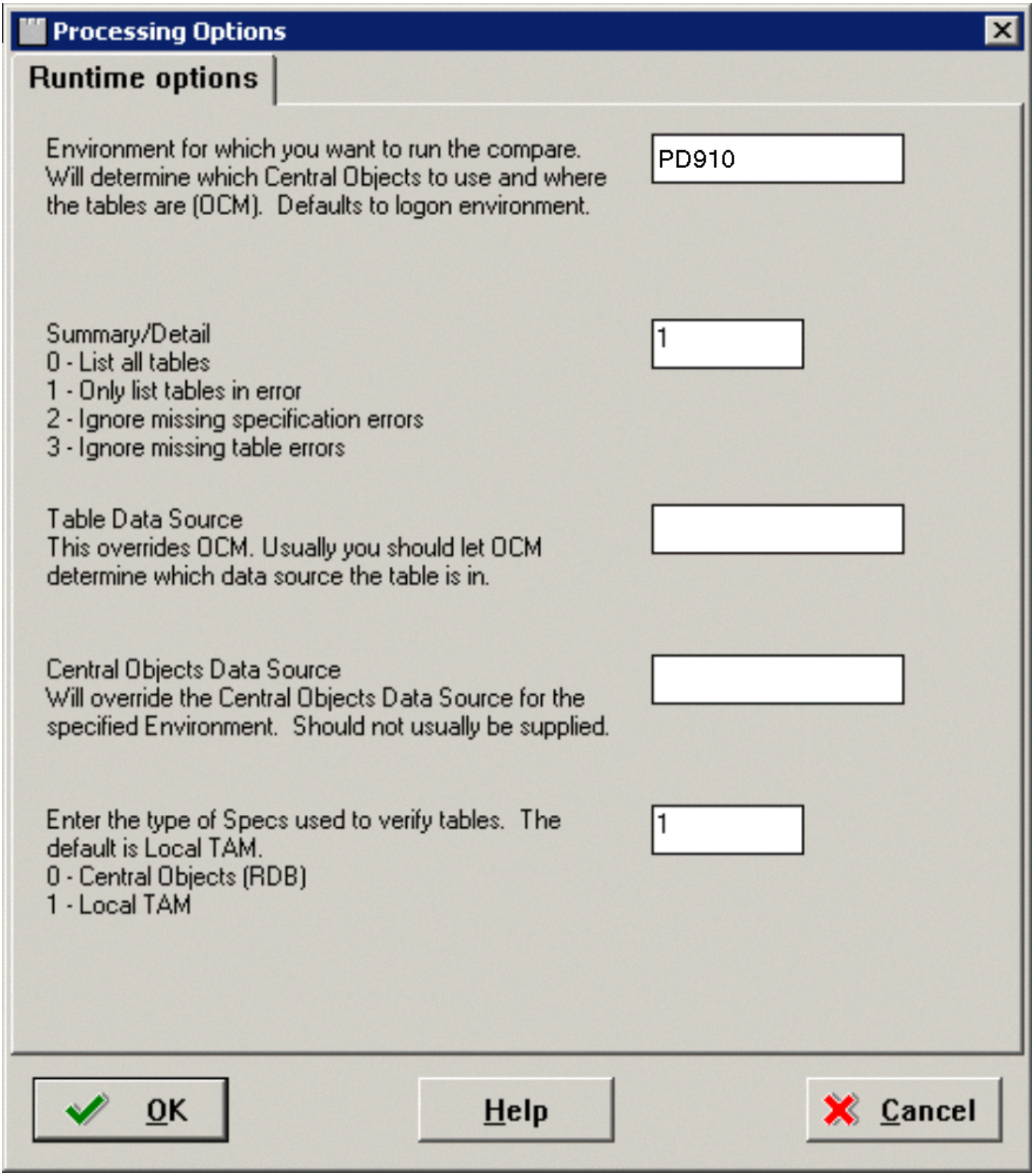
The best way to verify table formats is to run R9698711 (version XJDE0001). Audit results of TC Workbench to make sure all tables in correct format. Change Environment name to your upgraded environment.. This UBE lists all of the tables that differ from the specifications.

Before You Begin

Before you run the report, you should add Data Selection with these values:



Operator	Left operand	Comparison	Right Operand
Where	BC Product Code (F9860) (SY)	is not equal to	"55,89"
And	BC Data Class (F9860) (CLDF)	is equal to	" ,B,T" where the first value is a space character that specifies blank, B specifies Business Data, and T specifies Control Tables.
And	BC Object Type (F9860) (FUNO)	is equal to	"TBLE"


Processing Options
Runtime options
Environment for which you want to run the compare. Will determine which Central Objects to use and where the tables are (OCM). Defaults to logon environment.
PD910
Summary/Detail
0 - List all tables
1 - Only list tables in error
2 - Ignore missing specification errors
3 - Ignore missing table errors
1
Table Data Source
This overrides OCM. Usually you should let OCM determine which data source the table is in.
Central Objects Data Source
Will override the Central Objects Data Source for the specified Environment. Should not usually be supplied.
Enter the type of Specs used to verify tables. The default is Local TAM.
0 - Central Objects (RDB)
1 - Local TAM
1
OK
Help
Cancel

Or, look in the table conversion logs that are created in the pathcode printqueue directory. Review the table conversion logs, JDE.LOG and JDEDEBUG.LOG, to make sure the table conversion program finished successfully. The table conversion log states Completed Successful or Completed with Errors.

If the table conversion finishes with errors, review the entire table conversion log for specific error messages, and then review the JDE.LOG and JDEDEBUG.LOG for more specific messages about the failure.

If the table conversion log states that the table conversion finished successfully, review the table being converted in the data source that it is mapped to for the new release. The following task shows what to verify for each table being converted.

Verifying Table Formats

To verify table formats:

1. Verify table conversions that have a conversion sequence number of 99 or below by reviewing the **`.pdf`** and **`.log`** files generated to the printqueue directory.

   These conversions also can be verified by reviewing the log for R8998504.
2. Verify conversions with a conversion sequence number of 100 or above and process type 5 by reviewing the .log file generated in the printqueue directory. The following illustration shows the last few lines of a sample .log file for the R8903B20 report:

```
TCEngine Level 1 D:\
                                                E920
                                              \system\TCEngine\tcinit.c(1581):
    Format F03B20 contains 55 column(s)
TCEngine Level 1 D:\JDEdwards\
                                                E920
                                              \system\TCEngine\tcinit.c(1581):
TCEngine Level 1 D:\JDEdwards\
                                                E920
                                              \system\TCEngine\tcinit.c(1581):
    Format F03B20 contains 61 column(s)
TCEngine Level 1 D:\JDEdwards\
                                                E920
                                              \system\TCEngine\tcinit.c(1581):
TCEngine Level 1 D:\JDEdwards\
                                                E920
                                              \system\TCEngine\tcinit.c(1581):
    There is ER logic associated with the event Row Fetched from F03B20
TCEngine Level 1 D:\JDEdwards\
                                                E920
                                              \system\TCEngine\tcinit.c(1581):
    System function Insert Row into format F03B20
TCEngine Level 1 D:\JDEdwards\
                                                E920
                                              \system\TCEngine\tcinit.c(1581):
TCEngine Level 1 D:\JDEdwards\
                                                E920
                                              \system\TCEngine\tcrun.c(689):
    Conversion R8903B20 XJDE0001 done successfully.
    Elapsed time - 1.843000 Seconds.
TCEngine Level 1 D:\JDEdwards\
                                                E920
                                              \system\TCEngine\tcrun.c(697):
    Fetched 11 rows from F03B20
TCEngine Level 1 D:\JDEdwards\
```

```
                                                    E920
                                                  \system\TCEngine\tcrun.c(705):
    Inserted 11 rows, failed to insert 0 rows into F03B20
```

3. Use the information above to verify the conversion program using the following procedures:

    a. If the bottom of the .log file says the conversion was unsuccessful, review the rest of the .log from the beginning for specific errors. Also review the jde.log and jdedebug.log for more specific error information.
    b. If the bottom of the .log file says that the conversion was successful, review the file format of the physical file to see that the number of columns has changed.

       From the example .log shown above, F03B20 should now have 61 columns in the target data source instead of 55.
    c. Verify the record count in the physical file based on the log information.

       From the example .log shown above, F03B20 should now have 11 rows in the target data source.
    d. If the .log file says that there were insert failures, review the jde.log and jdedebug.log for more detailed information.
    e. If the conversion cannot be verified through the above procedures, check the table in *Verifying Table Conversions* for more specific verification information.

Understanding UDO Table Conversions

If you are upgrading from Applications Release 9.0 or 9.1, you may have **already** run the Table Conversions for User Defined Objects (UDOs). This is possible if you have already upgraded to Tools Release 9.2, which is when the UDO Table Conversions would have taken place. If so, the system would have marked those Table Conversions as having been run. Therefore when you upgrade to Applications Release 9.2, the tables would have been previously marked as Status 70, Duplication Conversion or Merge.

Below is a list of tables that would be marked as Duplicate Conversion or Merge if you have previously upgraded to Tools Release 9.2 before you upgraded to Applications Release 9.2 (as described above).

```
R89952450A
R89952430
R89952440
R89952450C
R89952440A
R89952440B
R89952400
R89952420
R89952430L
R89952400L
R899524000
R89952450B
R9312TC
R00950WF
R00950WTA
R00950WTB
R00950WTC
R00950WTD
R00950WTE
R00950WTG
R9000OVR
R98403A
```

Rerunning Table Conversion Programs

To rerun table conversion programs:

1. Technical conversions can be rerun without restoration. For process type 5 only, when you run a table conversion program from Table Conversion Workbench, the following occurs:

   - All table conversions should be rerun through the Table Conversion Workbench. If the status of the conversion is 60, you might need to change it back to 30.
   - The table conversion engine uses the object map to locate the table being converted in both the From and To environments.

   In the upgrade to *Release 9.2* , most application tables being converted will reside on the same data source on the from and to environments. This creates an in-place conversion.

   The physical table on the data source should be formatted following the specifications for the previous release.

   The table conversion engine creates a temporary table on this data source. Drop all temporary tables before starting the Table Conversion rerun procedure. The temporary file name has the notation <Table>TCTemp 'for example, F03B20TCTEMP.

   To find these tables:

   -
   - Enter these commands:

     ```
     STRSQL
     SELECT SYSTEM_TABLE_SCHEMA, TABLE_NAME FROM SYSTABLES
         WHERE TABLE_NAME LIKE 'F%TCTEMP'
     DROP TABLE PRODDTA\F0101TCTEMP
     ```
   - Use the Query Analyzer to connect to your enterprise environment database (for example, PS_DEV) and enter this command:

     ```
     Select a.name as 'Table name' from sysobjects a
     where a.name like 'F%TCTEMP'
     ```
   - Use SQLPlus to connect to your instance and enter this command:

     ```
     Select a.table_name "TABLE NAME" from dba_tables a
     ```

```
where a.table_name like 'F%TCTEMP'
```

- Use db2cmd to connect to your environment database (for example, JDE_DEVELOPMENT) and enter this command:

  ```
  Select creator, name from sysibm.systables where name like 'F%TCTEMP'
  ```

  For each of these databases, for each temp table, enter this command:

  ```
  DROP TABLE owner.tablename
  ```
- Do not drop temp tables for conversions still running.
- Enter this command:

  ```
  CLRPFM PRODDTA\F40941
  ```
- If restarting a conversion, first verify the original table was not dropped, then drop the temp table. For a Table Conversion, the base table must be in the old format. For Alter and Merge Conversions, this is not necessary.

Data is copied to the temporary table, the original table is deleted, and the temporary table is renamed to the original table name.

Clear out tables F40941, F40942, F40943, F0618TA, F42140A, F42150A, F42160A, F3201, F3211, F3215, F3216, F3290.

2. If the table conversion program has run but the table is still in its original format in the data source for the release from which you are upgrading, run the conversion program without file restoration. If the table conversion program has run but the table format in the data source has changed in the release from which you are upgrading, restore the table to its original format before running the conversion program again.

   When the table conversion engine runs an in-place table conversion, the temporary table required for an in-place conversion could be created and never dropped. In this case, rerunning the conversion program fails when creating the temporary table because the table already exists. To resolve this, drop or rename the temporary table before rerunning the table conversion. The temporary table has the name of the table being converted followed by the initials "TC" followed by the report name of the conversion program being run. The temporary name has the notation TableTCTEMP, for example, F03B20TCTEMP.
3. When the upgrade is complete and you are satisfied with the results, delete all SY = 89 tables from their data sources.

Deferring Index Builds During Table Conversion Workbench

Before running the Installation Workbench, you can mark specific Table Conversions to direct the TC Engine not to build indexes during those conversions. You may wish to defer building indexes on such table conversions where:

- The underlying table is very large (for example, F0911)
- The underlying table is very large and is converted several times during the Table Conversion Workbench. For example, if upgrading from Xe or ERP8:
  - F42199
  - F49219
  - F42119
  - F43199
  - F43121

  - F4101
  - F4102
  - F3111
  - F0618

- You are planning to do a Unicode conversion directly after the Upgrade and before you return the system to the end users. (The Unicode conversion recreates all indexes in any case).

When you mark a table with the Defer Index flag, the TC Engine creates the primary key and any other unique keys on that table before marking the conversion as complete. In almost all cases there is only one unique key on the tables and that is the primary key. However, there are a few tables with more than 1 unique key (for example F0902 has 4 unique keys, while F4101 has 3 unique keys).

> **CAUTION:** The absence of non-unique keys will not stop EnterpriseOne from working, but will have a severe impact resulting in poor performance. If you choose to defer index builds, you are responsible for creating the missing indexes once the Workbench is complete.

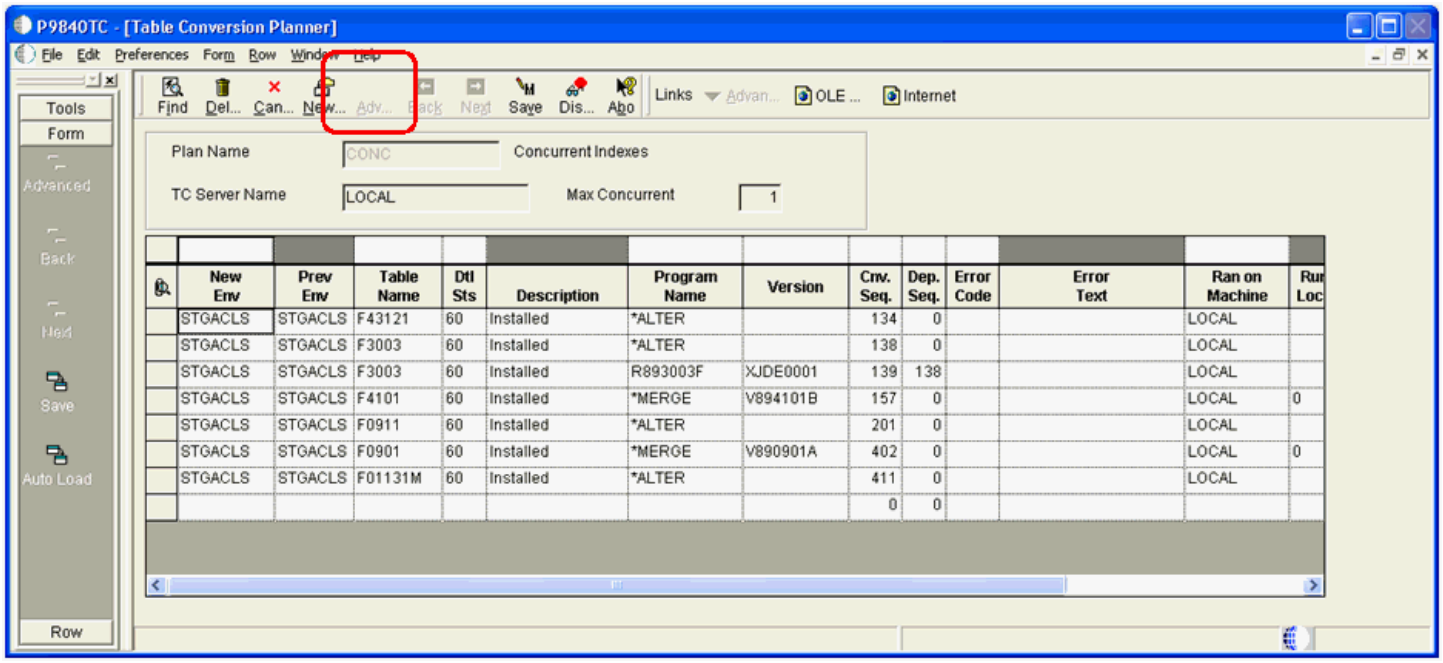
To use the Defer Index Build functionality, you must have the latest Planner Update and JD Edwards EnterpriseOne Tools Release on both Deployment Server and Enterprise Server. The Planner Update must be applied to the Pristine path code (PS920) and an update package must be built and deployed to PS920.

To use the Defer Index Build functionality:

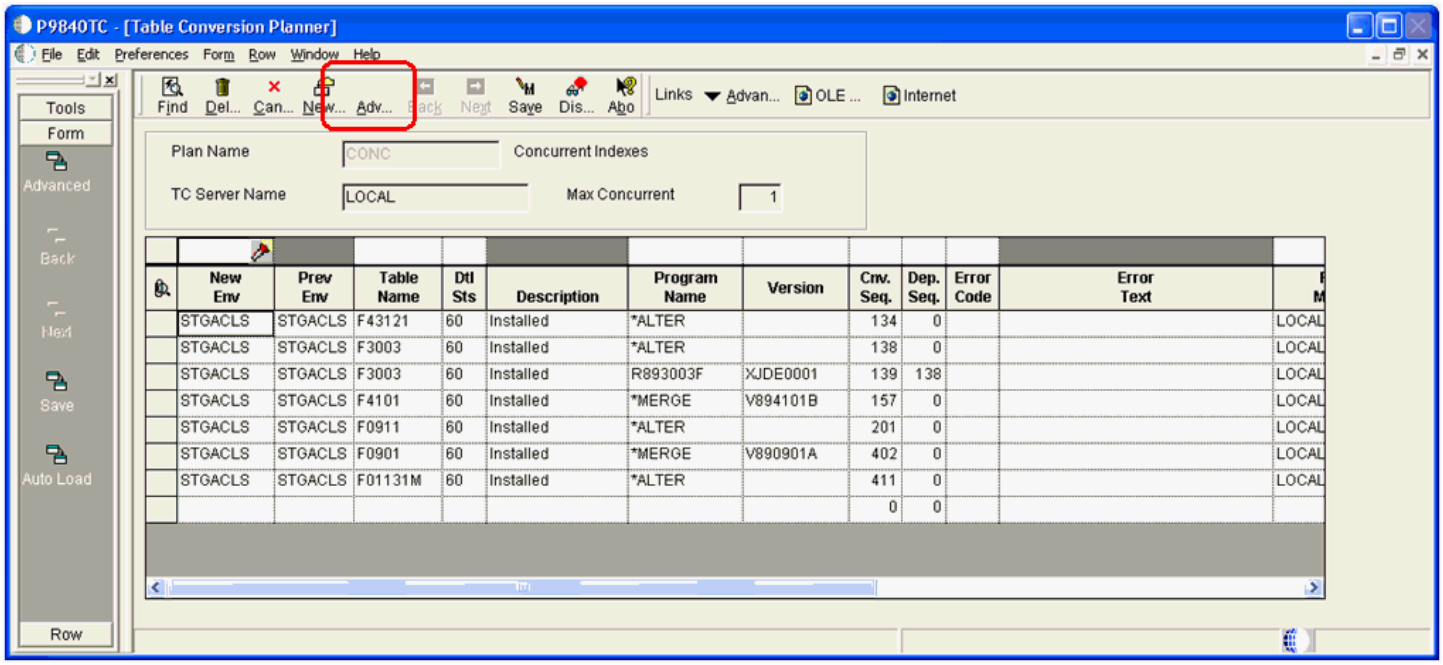
1. Run the Custom Plan application on menu GH961.

2. Drill down into Upgrade Plan, highlight Table Conversions, click on Select, and go into TC Planner.

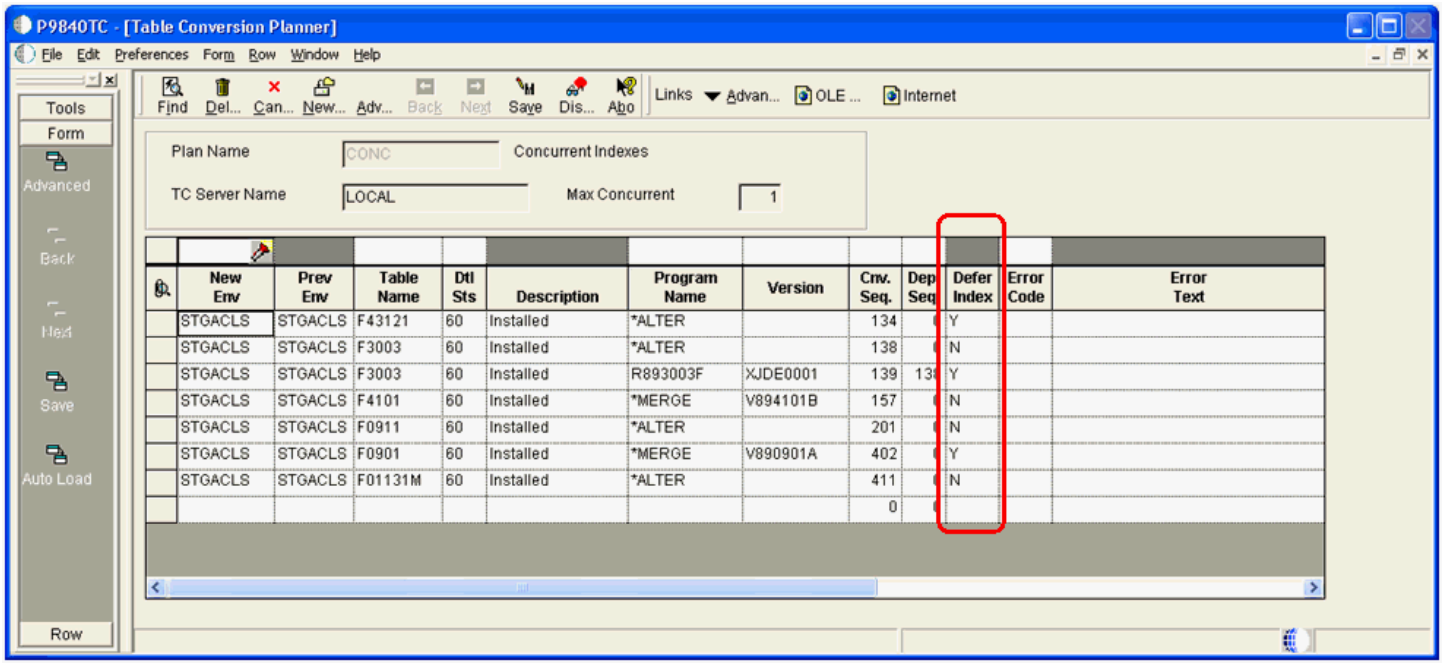
   If the latest planner release is not installed on the Deployment Server, the Advanced button will be disabled as shown in this example:



   If the latest planner release is installed on the Deployment Server, the Advanced Button is available as shown in this example:


P9840TC - [Table Conversion Planner]
File Edit Preferences Form Row Window Help
Find Del... Can... New... Adv... Back Next Save Dis... Abo
Links Advan... OLE ... Internet
Tools
Form
Advanced
Back
Next
Save
Auto Load
Row
Plan Name
CONC
Concurrent Indexes
TC Server Name
LOCAL
Max Concurrent
1
New Env
Prev Env
Table Name
Dtl Sts
Description
Program Name
Version
Cnv. Seq.
Dep. Seq.
Error Code
Error Text
STGACLS STGACLS F43121 60 Installed *ALTER 134 0 LOCAL
STGACLS STGACLS F3003 60 Installed *ALTER 138 0 LOCAL
STGACLS STGACLS F3003 60 Installed R893003F XJDE0001 139 138 LOCAL
STGACLS STGACLS F4101 60 Installed *MERGE V894101B 157 0 LOCAL
STGACLS STGACLS F0911 60 Installed *ALTER 201 0 LOCAL
STGACLS STGACLS F0901 60 Installed *MERGE V890901A 402 0 LOCAL
STGACLS STGACLS F01131M 60 Installed *ALTER 411 0 LOCAL
0 0

3. On Table Conversion Planner, click on **Advanced** button. As shown in the example below, a new column called Defer Index is displayed next to the Dependency Sequence column.

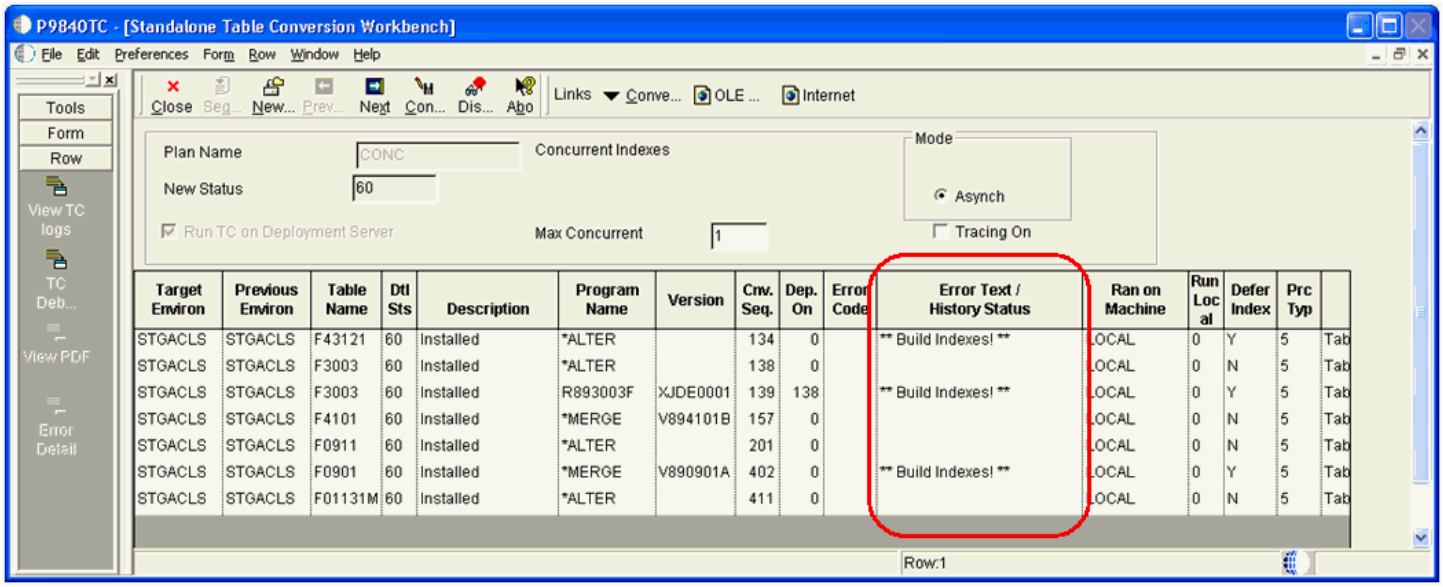


Note: By default, all values for the Defer Index column are set to N (do not defer index build).

4. Change the value in the Defer Index column to Y for any TC for which you do not want to build indexes during the Table Conversion Workbench.
5. Click the **Save** button.
6. Run the Upgrade plan to execute the Table Conversion Workbench that includes your specified Defer Index settings. If the TC Workbench does not complete successfully, you will see that the Error Text / History Status field is updated with the below value for any table that was marked as Defer Index:

   **** Build Indexes! ****

   Below is an example TC Workbench where the Defer Index value was set:



For the above TC Workbench results screen, the values of the Defer Index column are:

- **Y**

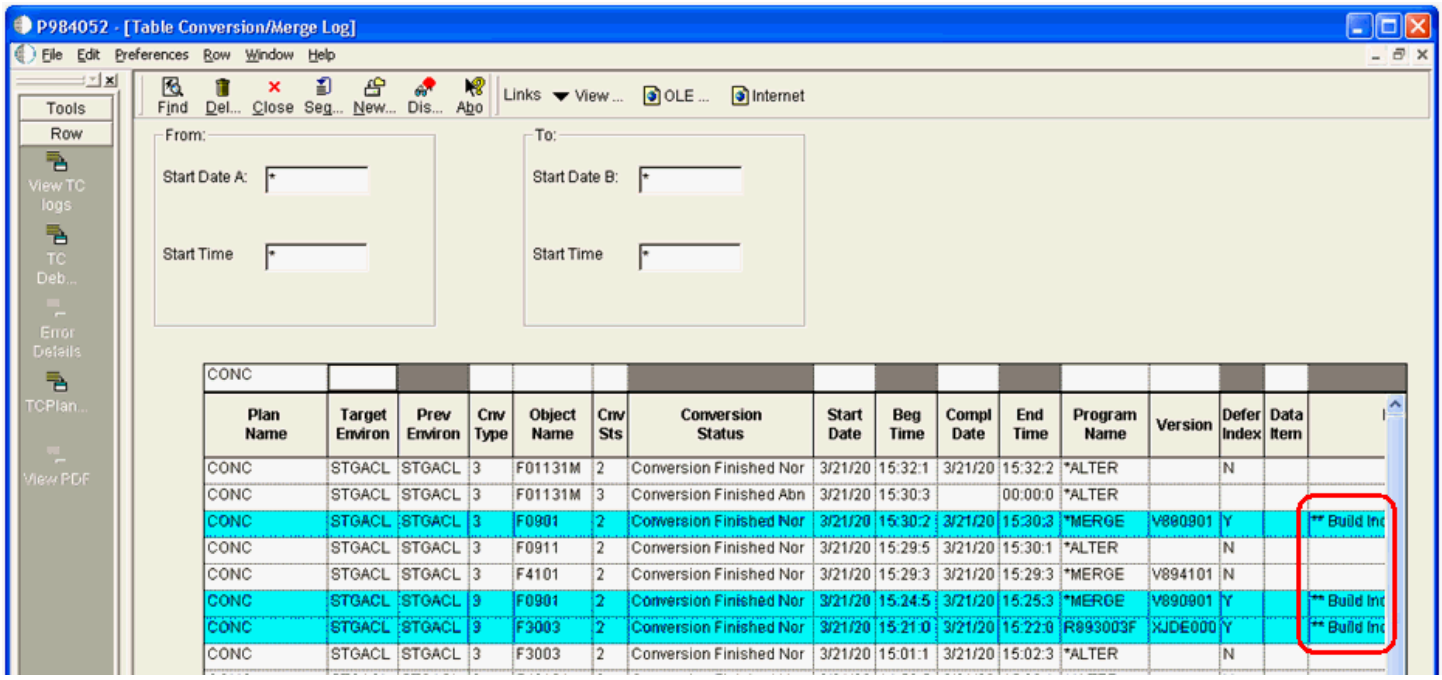
  Indicates the TC Engine created the table with only Unique indexes and Primary key and returned as successful.

  For TCs that have run where the "Y" was specified, you will see the **** Build Indexes! **** messages. This is not usually true for *ALTER as the TC Engine does not recreate the table for *ALTER.
- **N**

  Indicates the TC Engine completed successfully as it normally does, which includes the index build.

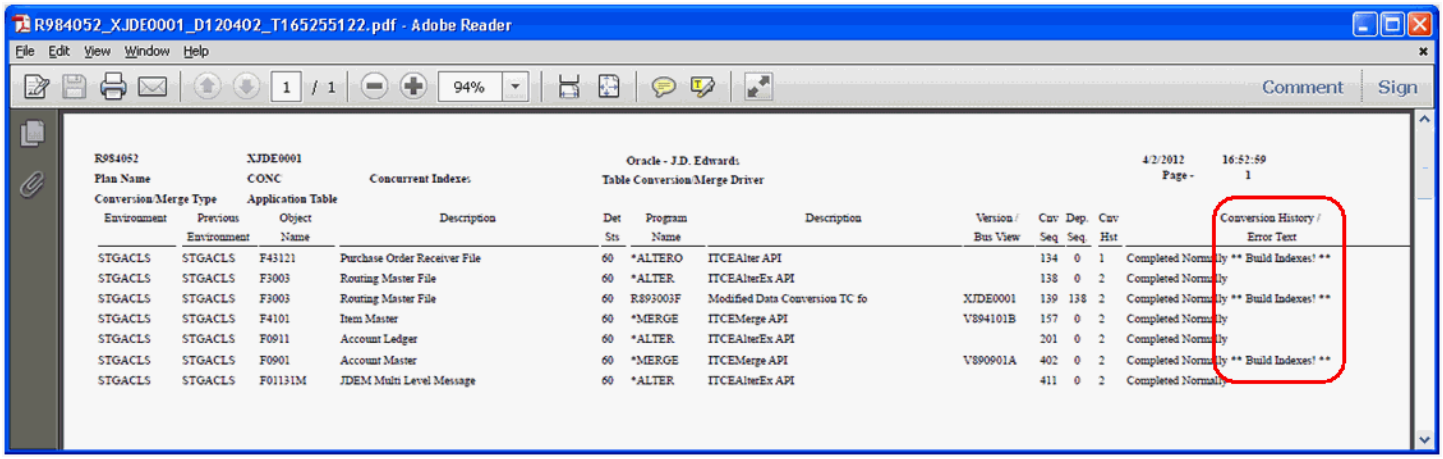
7. Review the Table Conversion Merge log (P984052).

   If the TC ran with value set to Y, the Conversion Merge log (P984052) includes the **** Build Indexes! **** messages, as shown in the example below:



8. Review the R984052 report that runs at end of TC Workbench.

   Each TC that ran with "Y" will have the **** Build Indexes! ****** message text as shown in the example below:



9. It is important to remember that at the complete of the TC Workbench, prior to using the tables, you must manually create the missing indexes. To do so, you can use one of the following methods:

Method One

a. Using the GUI for your database (SQL Management Studio), highlight the same table in the Pristine database (for example, F0911) and generate DDL to a file.
b. Using the GUI for your database (Oracle Enterprise Manager), highlight the same table in the Pristine database (for example, F0911) and generate DDL to a file.
c. Edit the SQL statements, substituting the tablespace names, owners, and database for your target schema. For example, replace ps920dta with proddta.
d. Run the SQL script from your database's GUI. Note that you should delete those CREATE INDEX statements that refer to indexes that already exist on the target table. The database GUI will tell you which indexes already exist.
a. Using the GUI for your database (Oracle Enterprise Manager), highlight the same table in the Pristine database (for example, F0911) and generate DDL to a file.
b. Edit the SQL statements, substituting the tablespace names, owners, and database for your target schema. For example, replace ps920dta with proddta.
c. Run the SQL script from your database's GUI. Note that you should delete those CREATE INDEX statements that refer to indexes that already exist on the target table. The database GUI will tell you which indexes already exist.
a. Using the GUI for your database (*DB2 for Linux, Windows, and UNIX* Control Center), highlight the same table in the Pristine database (for example, F0911) and generate DDL to a file.
b. Edit the SQL statements, substituting the tablespace names, owners, and database for your target schema. For example, replace ps920dta with proddta.
c. Run the SQL script from your database's GUI. Note that you should delete those CREATE INDEX statements that refer to indexes that already exist on the target table. The database GUI will tell you which indexes already exist.
a. Using the GUI for your database (System i Navigator for IBM i), highlight the same table in the Pristine database (for example, F0911) and generate DDL to a file.
b. Edit the SQL statements, substituting the library for your target schema. For example, replace PS920DTA with PRODDTA.
c. Run the SQL script from your database's GUI. Note that you should delete those CREATE INDEX statements that refer to indexes that already exist on the target table. The database GUI will tell you which indexes already exist.

Method Two

a. Generate the indexes on a trial run, with jdedebug turned on, and harvest the CREATE INDEX statements from the jdedebug log.
b. Use the GUI for your database (SQL Management Studio) to run the identified index builds as a sql script.
a. Generate the indexes on a trial run, with jdedebug turned on, and harvest the CREATE INDEX statements from the jdedebug log.
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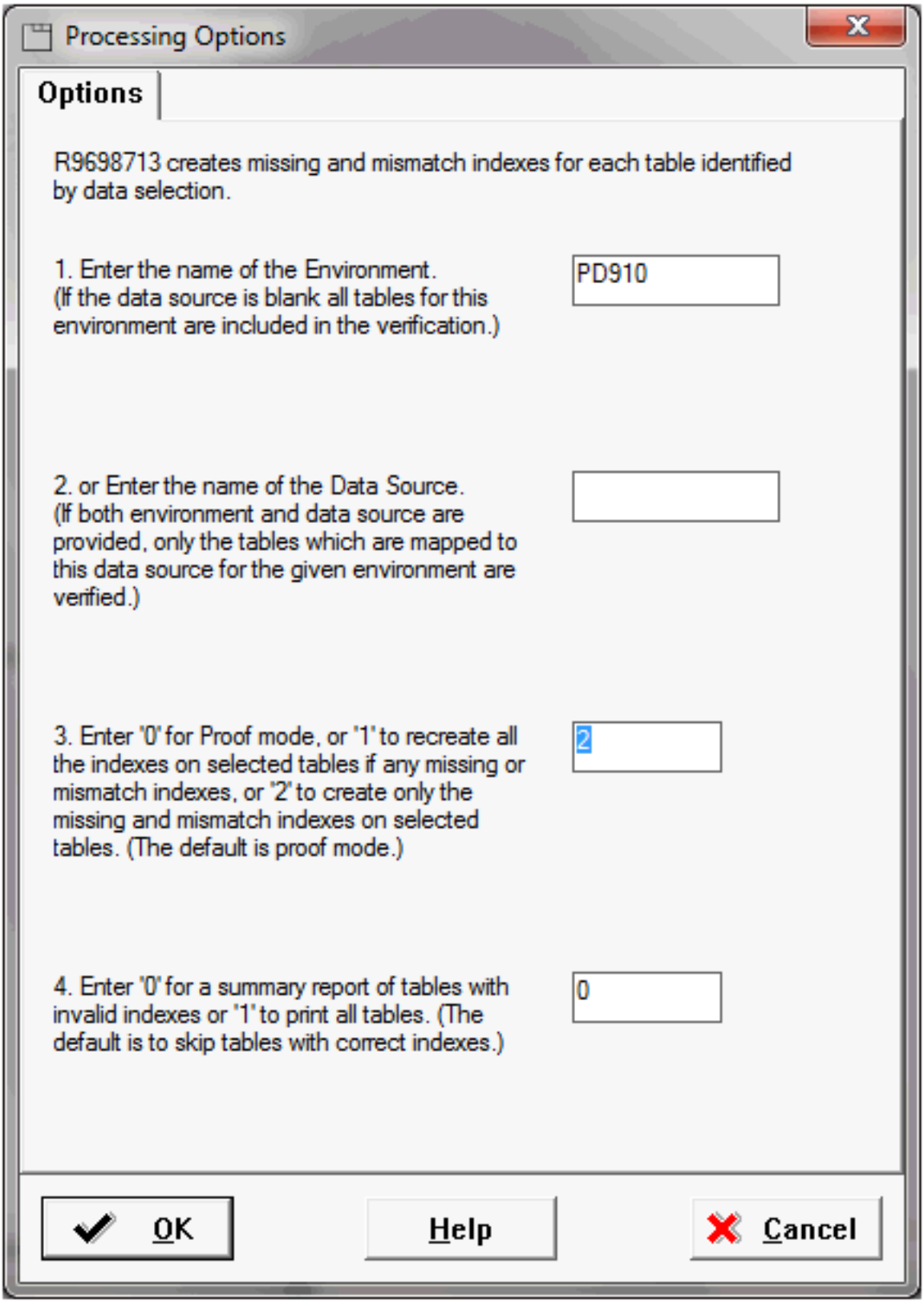
a. Generate the indexes on a trial run, with jdedebug turned on, and harvest the CREATE INDEX statements from the jdedebug log.
b. Use the GUI for your database (*DB2 for Linux, Windows, and UNIX* Control Center) to run the identified index builds as a SQL script.

a. Generate the indexes on a trial run, with jdedebug turned on, and harvest the CREATE INDEX statements from the jdedebug log.
b. Use the GUI for your database (System i Navigator for IBM i) to run the identified index builds as a SQL script.

Method Three

a. Run R9698713 and select the tables where you deferred the indexes. It will create the indexes one table at a time, one index at a time. It is possible to run different versions of R9698713 from different *Release 9.2* Admin clients, selecting different tables for each version.
b. It is not necessary to be signed into the target environment because you can override the environment in the Processing Options. Set the value for Processing Option 3 to a value of **2** to generate only missing indexes, as shown in the screen below:


Processing Options
Options
R9698713 creates missing and mismatch indexes for each table identified by data selection.
1. Enter the name of the Environment. (If the data source is blank all tables for this environment are included in the verification.)
PD910
2. or Enter the name of the Data Source. (If both environment and data source are provided, only the tables which are mapped to this data source for the given environment are verified.)
3. Enter '0' for Proof mode, or '1' to recreate all the indexes on selected tables if any missing or mismatch indexes, or '2' to create only the missing and mismatch indexes on selected tables. (The default is proof mode.)
2
4. Enter '0' for a summary report of tables with invalid indexes or '1' to print all tables. (The default is to skip tables with correct indexes.)
0
OK
Help
Cancel

Method Four (if your business data is Unicode)

The advantage of this method is that the RSTxxx commands all do multiprocessing while building the indexes.

a. Save the indexes for the table marked with Defer Index from the pristine library. For example:

```
SAVOBJ F0911_* PS920DTA *SAVF(X)
```

b. Restore the indexes to the PRODDTA library. For example:

```
RSTOBJ OBJ(*ALL) SAVLIB(PS920DTA) DEV(*SAVF) SAVF(X) OPTION(*NEW) RSTLIB(PRODDTA)
```

Method Five (if your business data is not Unicode, such as when upgrading from Xe)

a. Temporarily create the table in another non-Unicode datasource using OMW in *Release 9.2* . For example, another such non-Unicode datasource is **Control Tables - Prod**.

b. Save the indexes from the non-Unicode datasource. For example:

```
SAVOBJ F0911_* PRODCTL *SAVF(X)
```

c. Restore the indexes from the SAVF of PRODCTL to the PRODDTA library. For example:

```
RSTOBJ OBJ(*ALL) SAVLIB(PRODCTL) DEV(*SAVF) SAVF(X) OPTION(*NEW) RSTLIB(PRODDTA)
```

d. After the restore is done, drop the "temporary" table from PRODCTL.

Understanding Obsolete Tables

This section discusses these tables that were obsoleted in Release 8.9 at either system code 88 or 89.

- *System Code 88 Obsolete Tables*
- *System Code 89 Obsoleted Tables*

System Code 88 Obsolete Tables

The following lists obsolete tables which may be deleted from your databases after the table conversion for that environment has completed successfully.

Note: You will not have all of the below obsolete tables.

F00001
F0004SL
F0004HI
F0004LI
F0004LS
F0004S
F00053
F0005LS
F000531
F000532
F0005HI

F0005LI
F0005S
F0017
F0005SL
F00165X
F00165XJ
F0016D
F00171
F0040
F00172
F00173
F0018VI
F0031
F00530
F009109
F00530E
F00530P
F00825
F0090
F0101D1
F03465
F0101QA
F0101QAA
F0114W
F01800
F03B01
F03C04
F03B15P
F03BUI06
F03C02
F03C03
F03C05
F03C15
F03C11
F03C12
F03C13
F03C14
F03C16
F06400
F03CUI01
F04516
F04550
F04552SB
F06403
F07402
F06406
F06410

F06445
F07401
F07403
F07409
F07404
F07405
F07406
F07408
F07410
F07416
F07411
F07412
F07413
F07414
F07417
F07422
F07418
F07419
F07420
F07421
F07423
F07431
F07424
F07425
F07426
F07429
F07432
F07441
F07434
F07435
F07437
F07438
F07442
F07448
F07443
F07444
F07445
F07447
F07449
F085541
F07451
F075506
F078332
F078332A
F085542
F09UI001
F087710

F08901WF
F0911Z3
F09E111
F09UI002
F14104
F09UI003
F09UI012
F105503
F12UI001
F14110
F30UI003
F14111
F16UI002
F3003J
F3016J
F30UI009
F31UI003
F3104
F3112J
F31950
F31UI001
F31UI004
F3211Z1
F31UI005
F31UI410
F31UI418
F3211Z
F3411Z1
F34A04
F34A00
F34A01
F34A02
F34A03
F34A05
F34W01
F34A06
F34A07
F34A08
F34A09
F34W012
F34W04
F34W02
F34W03
F34W031
F34W032
F34W05
F34W10

F34W06
F34W07
F34W08
F34W09
F34W11
F34W142
F34W12
F34W121
F34W13
F34W141
F34W15
F34W19
F34W16
F34W17
F34W17B
F34W18
F34W20
F34W25
F34W21
F34W22
F34W23
F34W24
F34W26
F35UI01J
F34W27
F34W28
F34W29
F34W30
F4021W
F4311KAY
F40336
F40343
F4213
F4215T
F48S618T
F48126
F48098
F48099
F4810
F4811
F489111
F53015
F49090
F49711
F52801
F53001
F5302

F7302
F53021
F53024
F53034
F55MOIN
F74100
F74800
F74M0411
F74P0018
F74S0101
F75K0101
F74S347
F74S349
F74SN34
F75C01Z1
F75K0201
F76012
F75K0211
F75KUI01
F760018A
F760090A
F76031
F7691SSA
F7611BA
F7618B
F7691CBA
F7691CSA
F76A01
F76A05
F76A02
F76A03
F76A04
F76A06
F76A8121
F76A07
F76A31
F76A8120
F76A8122
F76A9003
F76A8123
F76A8124
F76A8125
F76A9002
F76A9004
F76AUI25
F76A91
F76A92

F76A94
F76AUI15
F76AUI87
F76AUI94
F76AUI95
F76B126
F76C4001
F46CT1
F76H0904
F76H0301
F76H0401
F76H0402
F76H0903
F76H0905
F80004
F76H0906
F80001
F80002
F80003
F80005
F8009E10
F800110
F800130
F800140
F8009E00
F8009E20
F800910
F800900
F800900S
F800901
F800901S
F800920
F8011
F800930
F800940
F80100
F80101
F80111
F801610
F80151
F80160
F801600
F801600S
F801620
F80300
F801630
F80170

F80171
F80200
F804110
F804300S
F804210
F804210S
F804220
F804300
F804301
F804305
F804302
F804302S
F804303
F804304
F804810
F8399
F809E00S
F81A13
F81A14
F81A15
F8800
F8916V
F8916
F8916L
F8916RS
F8916S
F8916V2
F8926RS
F8916X
F8916Y
F8916Z
F8926
F8926Y
F9002HI
F8926Z
F89500
F89500G
F89601
F9002LI
F91013
F9002LS
F9002S
F9002SL
F9066
F95000
F9752
F95020

F950900
F95100
F9751
F9753
F98612
F9754
F98SYSGR
F98311
F98500
F986120
F98768
F98614
F98701
F98744
F98751A
F98790
F99FSAR3
F98FLATM
F99FCOEX
F99FSAR1
F99FSAR2
F99FST02
FD3N015
F99F9911
F99WFMSG
F99WFSYS
FD3N010
FD3N017
FD3N025A
FD3N018
FD3N020
FD3N021
FD3N025
FD3N026
FD3N056
FD3N030
FD3N040
FD3N050
FD3N055
FD3N120L
FD3N901
FD3N120P
FD3N120T
FD3N120W
FD3N120X
FD3N902
FD3N913

FD3N903
FD3N904
FD3N910
FD3N911
FD3N915
JDECODE

System Code 89 Obsoleted Tables

For system code 89 there are two types of obsoleted tables:

- Business Data tables that *JD Edwards EnterpriseOne* no longer uses, but are required to access the data within for the upgrade. It is recommended to back these up somewhere until they're satisfied everything runs as should be.

- New temporary tables that are used by TCs. After the TC runs successfully, these can be deleted. They are not full tables, just a couple of columns used for performance (with millions of rows...) These are:

  Note: You will not have all of the below obsolete tables.

  F00151
  F05290T
  F06116T
  F06116TZ
  F0618TA
  F063951T
  F0901T
  F0911T
  F0911Z1T
  F0917S
  F186407D
  F186407T
  F32UI002
  F3214
  F3294
  F3294Z
  F32941
  F32942
  F32943
  F32944
  F32945
  F3295
  F3296
  F3296T
  F32961
  F329611
  F4009T
  F4100T
  F41001T
  F4101TT
  F4102TT
  F31172TE
  F4072TEM
  F41021A
  F40344A
  F42005A
  F42140A
  F42150A
  F42160A
  F31172TE
  F42199A
  F4311TA

F43199A
F43121TA
F4211A
F4211B
F4074TEM
F4094TEM
F42119A
F42119B
F4600T
F4600TPU
F46011T
F46091T
F4611T
F4611TPU
F7460
F750401A

Understanding Specification Table Merges

Specification Table Merge Workbench runs the batch applications that merge custom modifications into the new specification tables. It then updates the Table Conversion Scheduler table (F98405) to indicate completion, and writes a conversion log record. The Object Librarian and Versions List merges are now a part of the specification merge.

For all users, the Specification Merge merges data in the following order:

- Object Librarian
- Versions
- Specifications

For users installing an alternate language, the Specification Merge Workbench merges the central objects and language text from the previous release into the new central objects database.

The central objects tables contain the alternate language records needed for displaying text in the selected language. Language-enabled tables include the Processing Option Text table (F98306), the Report Design Aid Text Information table (F98760), and the Forms Design Aid Text Information table (F98750). Depending on the environment choices made during the English installation, you might have several sets of central objects; for example, one set for each environment loaded during the English-language installation.

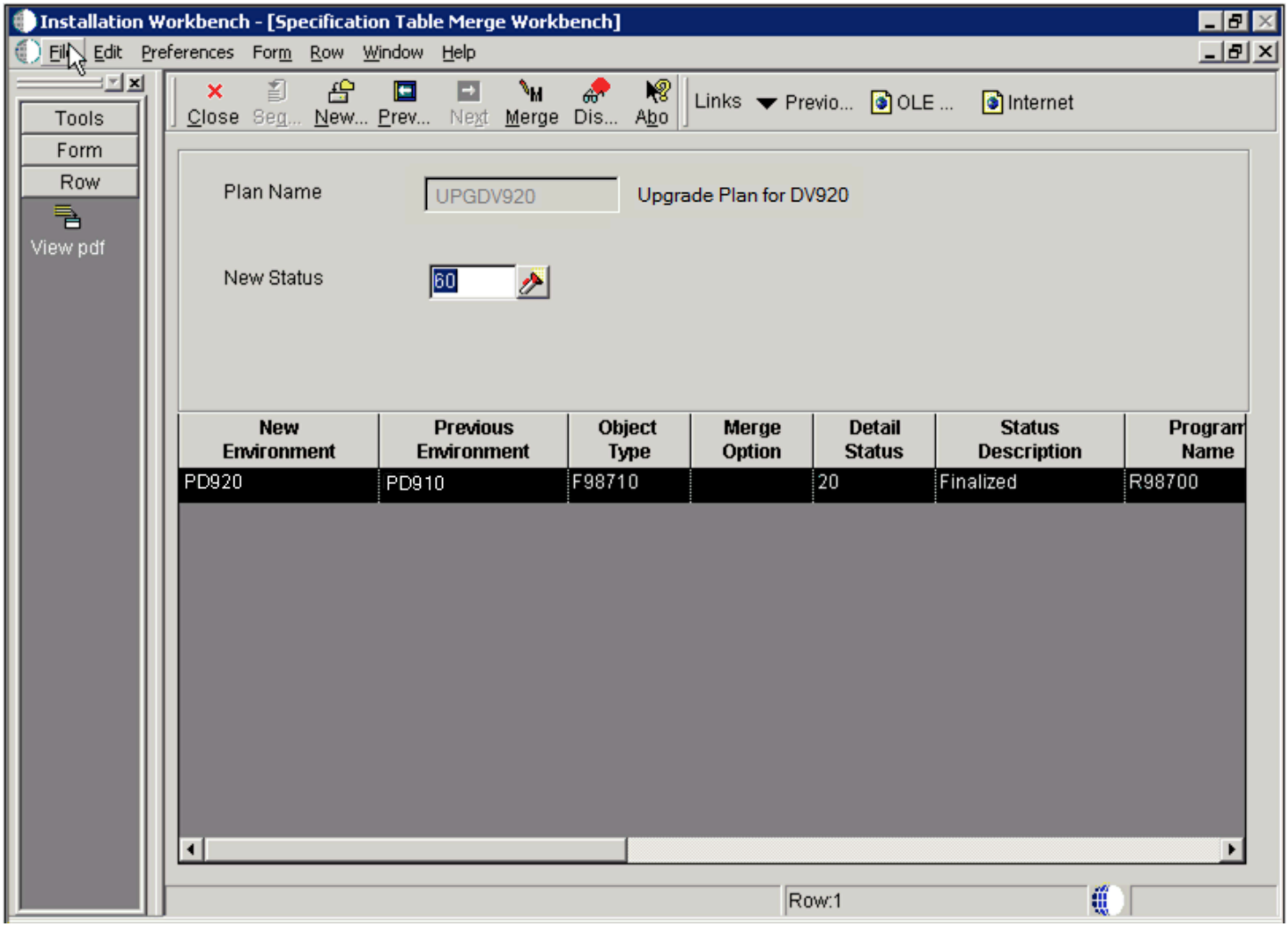
> **Note: Simplified Upgrade Specification Table Merge.** This Workbench runs R98700|XJDE0001 as driven off the manifest. This Workbench replaces or adds all objects. The source of the merge is the PS920 JDE Pristine objects. The Workbench also deletes specs for obsoleted objects.

This section discusses:

- *Merging Specification Tables*
- *Restarting the Specification Merge*

Merging Specification Tables

To merge your specification tables:



1. On Specification Table Merge Workbench, choose Merge All from the Form menu.

   If you are installing an alternate language, the Plan Name field on the Specification Table Merge Workbench form will contain the name of your language plan.
2. After the merge finishes, verify the output of the report that is produced.

Restarting the Specification Merge

If the Specification Merge stops with a status of 50 before it completes successfully, you can restart it from the point at which it stopped. If the merge completed successfully, you can skip this task and continue with the next task.

If the Specification Merge abruptly stops with a status of 45 (running), you should change it to status 50 and click Save.

To restart the specification merge:

1. Check the Specification Merge status as shown in the Specification Merge Workbench.

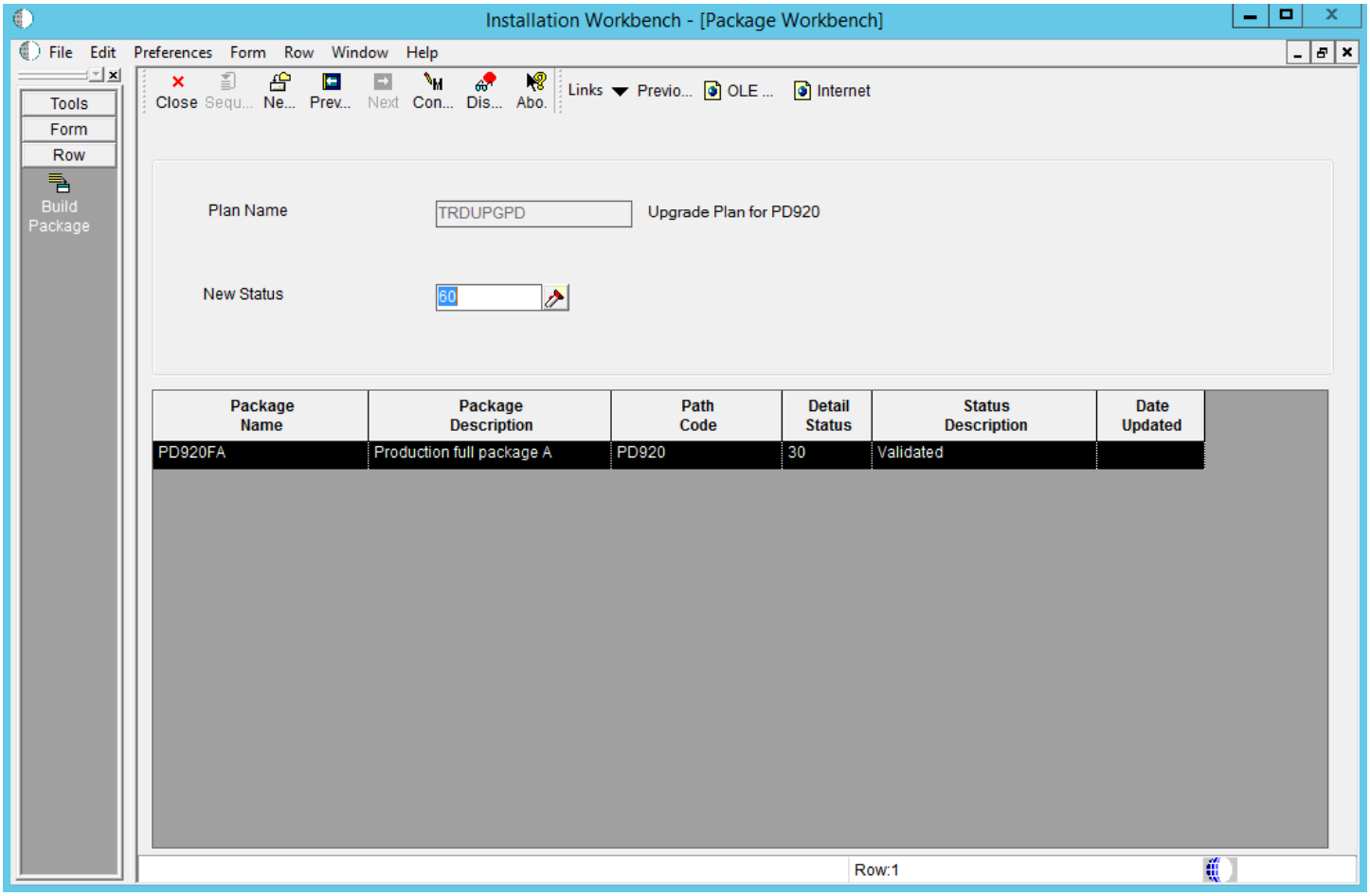
   If the status is 50, you can restart the Specification Merge by clicking Merge or Merge All. The Specification Merge restarts and processes all non-processed objects. Before restarting, review all objects with merge status of error and follow the procedures in *Modifying the Merge Status of an Object* to reset the merge status using P98700.
2. On menu GH9611 run Specification Merge Status.
3. Filter on Merge Status 1 (in Process).
4. Make a note of the object that is in process.
5. Highlight that object, click on Reset Merge Status.
6. On the next screen, change the New Merge Status to 0.
7. Click the **OK** button.

> **Note:** If the object being processed was a UBE, BSVW or TBLE, you need to verify that object once the Specification Merge has completed. The object may have had some changes applied twice.

Using the Package Workbench

Package Workbench transfers the F9603 and F9631 tables from the Planner data source to the *System - 920* data source. It then updates the F98404 table to indicate completion.

Use this procedure when running Workbench in attended mode or if a task break is set before Package Workbench. Refer to the *JD Edwards EnterpriseOne Tools Package Management Guide* for complete information about building and configuring packages.



1. On Package Workbench, review your packages.
2. Select Configure from the Form menu.

Using Remote Location Workbench

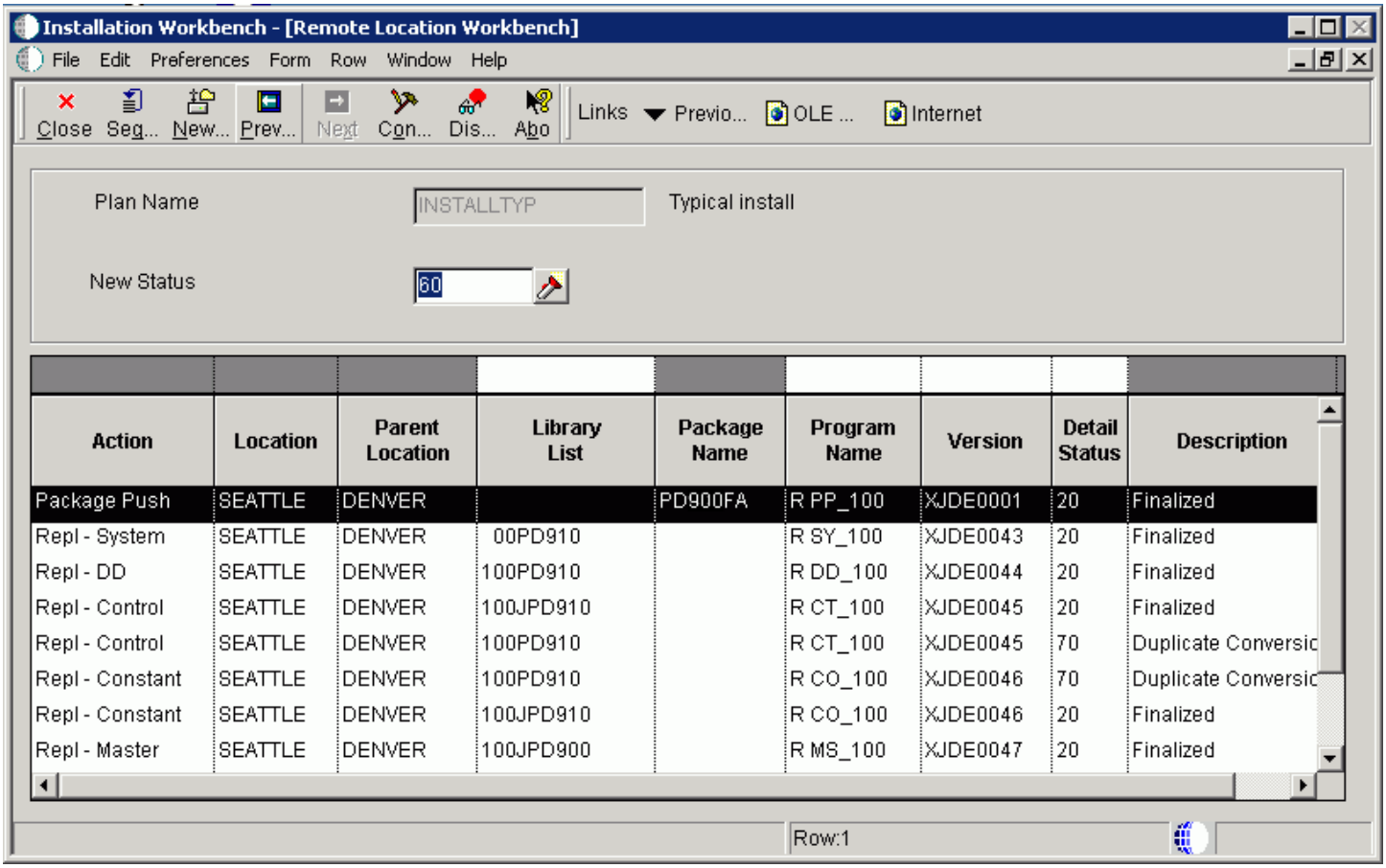
Note: This workbench only appears when Remote Locations have been set up.

Remote Location Workbench loads business (master and constant), control, data dictionary, and system tables from base location to remote location servers, by launching different versions of R98403 (XJDE0043, XJDE0044, XJDE0045, XJDE0046 and XJDE0047). It also pushes delivered packages to primary Deployment Servers at remote locations by launching the multi-tier UBE (R98825C). This workbench is processed only if you opted to install remote locations and chose to load replicated data and push packages.

Use this procedure when running Workbench in attended mode or if a task break is set before Remote Location Workbench.

Configuring Remote Locations

To configure remote locations:

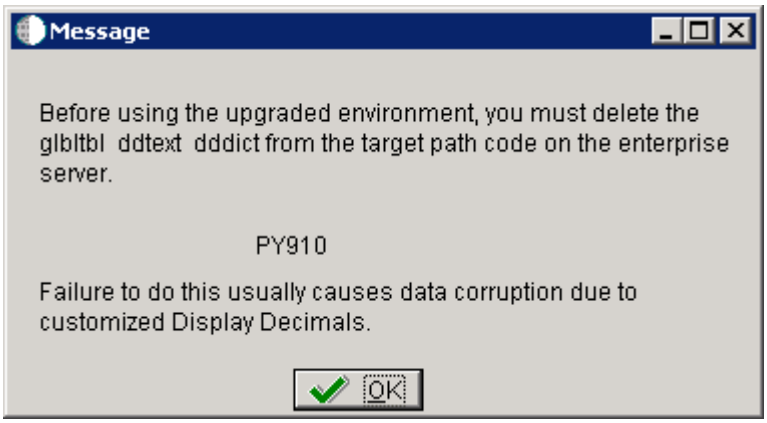


To configure your remote locations:

1. On Remote Location Workbench, *Release 9.2* displays all remote location activities in the detail area.
2. On the Form menu, select Configure to launch the workbench.
3. After all remote location activities are complete, click Next.

Finishing Installation Workbench

Note: In order to avoid issues with the JD Edwards EnterpriseOne Data Dictionary after an Upgrade, if you are running Table Conversions on the Enterprise Server, the Installation Workbench displays the following Message:



This message warns that before using the upgraded environment, you must delete the glbltbl, ddtext, and dddict spec files from the target path code on the Enterprise Server. Failure to do this usually causes data corruption due to customized Display Decimals. At this point you should delete these spec files as instructed, and then click the **OK** button in the Message to continue.

To finish the Installation Workbench:

1. From Congratulations, on the Form menu, click Finish.
2. From Work with Installation Plans, click Close.

Note: Post Install Procedures still need to be completed from a client. See *Performing Post Installation and Upgrade Tasks*.

7 Working With the Enterprise Server

Installing a 32-bit Database Client

PORTTEST will fail if the Enterprise Server does not have an appropriate 32-bit database client installed. This database client is required in order for JD Edwards EnterpriseOne to communicate with any database (local or remote). Regardless of whether your Enterprise Server is 32-bit or 64-bit, it is important that the database client be 32-bit so that it works properly with JD Edwards EnterpriseOne, which is a 32-bit application.

For Oracle databases, the installation of the database client is the same as that for the Deployment Server, which is described in the chapter of this guide entitled: *Working with the Deployment Server* in the section entitled: *Installing a 32-Bit Oracle Database Client*. For other-than-Oracle databases, the concept is the same and you will need to obtain the appropriate client from your database vendor.

Verifying the Enterprise Server Installation Using PORTTEST

> **Note:** When running PORTTEST after installing the Enterprise Server, the test returns a failure message. This is because it is not able to access the F0902 table at this time, (the format of the F0902 table changes during the Table Conversion Workbench). Ignore any errors relating to accessing the F0902 table, (for example, Select all on table F0902 failed - rcode=0). Once the Workbench tasks are all complete, and the Enterprise Server is configured, rerun PORTTEST.

To verify the Enterprise Server installation using PORTTEST:

1. Log on to the *IBM i* Enterprise Server as ONEWORLD (or other *Release 9.2* user).
2. On Current *Release 9.2* Versions, select the version of *Release 9.2* that you want to use and press Enter.
3. To verify that *Release 9.2* is installed correctly on the Enterprise Server, enter these command:

   ```
   GO JDEOW\A98OWMNU
   ```
4. On the A98OWMNU menu, select selection 4 to run PORTTEST.

   This program initializes a user and an environment. The program selects records from the F0902 table, which appear as messages on your screen. If messages indicating your selections do not appear, review the jde.log file. You should log on to each environment that you installed using JDE as the user and JDE as the password.

   > **Note:** If you are running PORTTEST prior to running Table Conversions, it will fail half-way through because the F0009 and F0010 are not in the correct format.

> **Tip:** If PORTTEST fails to run, refer to *Using the PORTTEST Checklist* for diagnostic assistance.

Starting Network Services on the Enterprise Server

To start the network services on the Enterprise Server:

1. Log on to the *IBM i* Enterprise Server as ONEWORLD (or other *Release 9.2* user).
2. On Current *9.0* Versions, select the version of *Release 9.2* that you just installed, and press Enter.
3. The first time you start the *IBM i* Enterprise Server, enter these commands and options:

   GO JDEOW\A98OWMNU

   select selection 6 to end JDE Server.

   select selection 7 to clear the IPC.
4. To start the Enterprise Server, use these options:

   select selection 5 to start the JDE Server.

   select selection 8 to display active jobs.
5. Verify that the entry **NETWORK** is running with **PGM-JDENET N** in **SELW** status.

Stopping Network Services on the Enterprise Server

To stop the network services on the Enterprise Server:

1. Log on to the *IBM i* as ONEWORLD.
2. On the *IBM i* command line, enter this command:

   ENDNET

   This command ends JDENET from an *IBM i* display, ends the JDENET jobs, and cleans up JDENET run-time structures.
3. On the *IBM i* command line, enter:

   ENDSBS SBS(JDE) OPTION(*CNTRLD)

   where is the release to which you are installing (for example, *E920*).

   This command ends the JDE subsystem.
4. On the *IBM i* command line, enter:

   WRKACTJOB SBS(JDEx)

   where *x* is the release to which you are installing (for example, *E920*).

   Wait until the JDE subsystem ends before you continue.

Creating an Output Queue for the Default Printer

To create an output queue for the default printer:

1. Log on to the *IBM i* as the QSECOFR.
2. Enter this command:

   ```
   GO JDEOW\A98OWMNU
   ```
3. Enter the appropriate selection to create an output queue.
4. Complete these fields and press Enter:

Field	Description
Outqueue Name	The outqueue name for the printer.
Printer IP Address	The network address of your printer.
Remote Printer Queue	You are required to set the remote printer queue (parameter RMTPRTQ) to something other than (`) and (') for some printers. For example, you must set this parameter to PASS for the IBM network Printer 4317. See the printer's user manual for additional information.

Creating the Job Queue

To create the job queue:

1. Log on to the *IBM i* as the QSECOFR.
2. Enter this command:

   ```
   GO JDEOW\A98OWMNU
   ```
3. From the menu, select this option:

   ```
   11 - Create Job Queue
   ```
4. To determine the unused sequence number, enter this command:

   ```
   DSPSBSD SBSD(QBATCH)
   ```

   Select the option for Job Queue Entries, and then record an unused sequence number.

Working with OCM Generation

This section discusses:

- *Understanding OCM Mappings*
- *Understanding Data Source Setup*
- *Understanding OCM Creation*
- *Understanding OCM Customization*

Understanding OCM Mappings

JD Edwards EnterpriseOne does not ship Object Configuration Manager (OCM) records for standard environments in *Release 9.2* . They are generated when you finalize an installation plan. OCM is created based on the Data Class for data sources and for a table or GT object. The Data Class is stored on the Data Sources By Environment (F98511), Data Source Master (F98611) and Object Librarian Master (F9860) tables.

Understanding Data Source Setup

Before OCM can be created, you must configure your data sources. Data source configuration and prompting is driven by the data in the F98511 table.

The first set of data sources to be configured is the Enterprise Server data sources. This includes the Server Map data source. Also, logic data sources are automatically configured without prompting. OCM records are not created for the server map data source. UBE, BSFN, RTE, and XAPI mappings are created for the logic data sources.

The next set of data sources to be configured is the shared data sources. This includes System, Data Dictionary, and Object Librarian data sources. The first time these data sources are configured, the shared data source template (F98511.SPLL = *SHARED) is copied and tokens are replaced in the data source name and properties to create the shared data source records (F98511.SPLL = DEFAULT). These defaults are then used to create the data source definition in the F98611 table. If record in the F98611 tables already exists, the defaults from the F98511 table are overridden by the current definition. The user is then optionally prompted to customize the data source.

The last set of data sources is the environment data sources. A set of data sources is configured for each environment. This includes Business Data, Control Tables, Central Objects and Versions.

The environment data source template (F98511.SPLL = *ENV) stores defaults for environment data sources. As data sources are configured for an environment, these records are copied and tokens are replaced in the data source name and properties to create records for the environment (F98511.SPLL = *Environment Name*). These defaults are then used to create the data source definition in the F98611 table. If records in the F98611 table already exists, the defaults from the F98511 table are overridden by the current definition. The user is then optionally prompted to customize the data source.

Given that the standard environments do not always follow the defaults that are specified in the *ENV template, *JD Edwards EnterpriseOne* provides preconfigured records for the standard environments. Thus, the *ENV template is only used for custom environments.

Understanding OCM Creation

After your data sources have been defined and the plan is complete, the plan is finalized. OCM is created during finalization.

This section describes:

- *Understanding Database Data Sources*
- *Understanding Logic Data Sources*

Understanding Database Data Sources

The process finds the data class for each table or GT object in Object Librarian (F9860.SICLDF). Based on the environment that is being configured and the data class for the object, the data source name is fetched from F98511. If a record is not found, it looks for a record for the data class where environment name is DEFAULT (to determine whether it should be mapped to a shared data source). If a record is not found, no mapping is created and the table is effectively mapped to the default data source. If a record is found and that record is set as the default mapping data source (F98511.SPDFLTMAP), a mapping with object name DEFAULT is created; otherwise the actual object name is used. Mappings are not created for tables in the Planner and Internal data classes.

Understanding Logic Data Sources

The OCM generation algorithm for UBEs and BSFNs are identical to each other, but the output depends on whether the default mapping is LOCAL or an Enterprise Server.

The following table shows the default mappings for UBE and BSFN objects.

UBE or BSFN	**Base Environment** ***DV920*** **,** ***PS920*** **,** ***PD920*** **,** ***PY920***	***HTML Web Server*** **Environment** **J** ***DV920*** **, J** ***PS920*** **, J** ***PD920*** **, J** ***PY920***
UBE	Enterprise Server	Enterprise Server
BSFN	LOCAL	Enterprise Server

The algorithm is:

- If the default is LOCAL, a default mapping to LOCAL is created. Server mappings are created for any object whose Location (labeled Business Function Location for BSFNs and Process Location for UBEs) in Object Management Workbench (OMW) is Server Only (F9860.SIBFLOCN = 3).
- If the default is Enterprise Server, a default mapping to the Enterprise Server is created. LOCAL mappings are created for any object whose Location (labeled Business Function Location for BSFNs and Process Location for UBEs) in OMW is Client Only (F9860.SIBFLOCN = 1).

Understanding OCM Customization

This section discusses:

- *Understanding Data Classes*

- *Creating a New Data Class*
- *Modifying the Data Source Template*
- *Associating Table Data Classes*

Understanding Data Classes

The data class is at the center of automatic OCM generation. It categorizes the type of data stored in data sources and tables, for example, in the Business Data data source the data class is **B** while in the System data source the data class is **S**. If you want to split business data into multiple data sources, you need to create a new data class, add a data source to the data source template for that data class (so Installation Planner prompts for the data source) and assign tables and GT objects to that data class. OCM will be created based on this information. You should do these steps before creating your plan.

Creating a New Data Class

You must create a new data class by adding a value to the H96/DU User Defined Code (UDC) for data sources and H96/CL UDC for table and GT objects.

Modifying the Data Source Template

A data source template defines the set of data sources that will be used by an environment, and the default values for the properties of the data source. They are stored in the F98511 table.

The information in this table can be edited using Data Source Templates By Environment (GH9611) program. By understanding this application, you can implement custom environment naming standards and ease the creation of environments.

Typically, you will add records to the template for new environments. The template can be found by filtering on *ENV in the environment field. Installation Planner prompts for this set of data sources whenever a new environment is created. The first time data sources are configured for a new environment, these records are copied and tokens replaced to create records specific to the new environment.

If you want to add a new data source to a standard *JD Edwards EnterpriseOne* environment, enter the environment name into the filter field and add a record specifically for that environment.

Records with an environment *LOGIC are for logic and server map data sources. They are set up when selecting an Enterprise Server.

Associating Table Data Classes

A table is associated with a data class using a field on the Object Librarian table (F9860.sicldf). Table data classes can be modified two ways.

- Object Management Workbench (GH902) - Select the table in the left tree view in OMW and click Design.

  Select the Install\Merge Codes tab and modify the data class value. Click OK. Modifying the data class does not affect existing OCM mappings, it is only used when creating mappings for a new environment.
- Table Data Classes - This application can be used to modify the data class for several tables at once.

  This should only be used by a *JD Edwards EnterpriseOne* administrator. Go to GH9611 and open Table Data Classes. Use the QBE to filter the list of tables in the grid. Select one or more tables whose data class will be changed. Click Select. Type in the new data class value and click OK.

Once these three steps have been taken, planner will prompt for the new data source and create OCM mappings for the new data source whenever an environment is added to a plan and the plan is finalized.

Environment	Object Name	User/Group	Data Source
ENV1	DEFAULT	*PUBLIC	Business Data - ENV1
ENV1	F0094	*PUBLIC	*System - 920*
ENV1	F9860	*PUBLIC	Object Librarian - 920
ENV1	F9200	*PUBLIC	Data Dictionary - 920
ENV1	F0004	*PUBLIC	Control Tables - ENV1
ENV1	F983051	*PUBLIC	Versions - PY920
ENV1	GT92002	*PUBLIC	Data Dictionary - 920
ENV1	GT9860A	*PUBLIC	Object Librarian - 920
ENV2	DEFAULT	*PUBLIC	Business Data - ENV2
ENV2	F0094	*PUBLIC	*System - 920*
ENV2	F9860	*PUBLIC	Object Librarian - 920
ENV2	F9200	*PUBLIC	Data Dictionary - 920
ENV2	F0004	*PUBLIC	Control Tables - ENV2
ENV2	F983051	*PUBLIC	Versions - DV920
ENV2	GT92002	*PUBLIC	Data Dictionary - 920
ENV2	GT9860A	*PUBLIC	Object Librarian - 920

Setting Up a Printer and Default Output Location on the Enterprise Server

This section describes these tasks, which must be performed in the deployment environment:

- *Adding a New Printer*

- *Defining a Default Printer*
- *Defining a Default Output Location (Tools Release 9.2.1)*

You also can print *Release 9.2* reports, modify existing printers, and delete printers. These tasks are described in detail in the *JD Edwards EnterpriseOne Tools Runtime Administration Guide*. Refer to that document to learn more about setting up a printer to run from the *Release 9.2* Enterprise Server.

If a printer was installed in your previous release of *Release 9.2*, you do not need to re-install that printer. All printer settings are carried forward during the upgrade to this release.

Adding a New Printer

Release 9.2 provides a Printer Setup director to help you add printers. Instructions appear on each form of the director to guide you through the printer addition process. This procedure is used in conjunction with the steps that appear on the forms of the Printer Setup director.

To install your first printer:

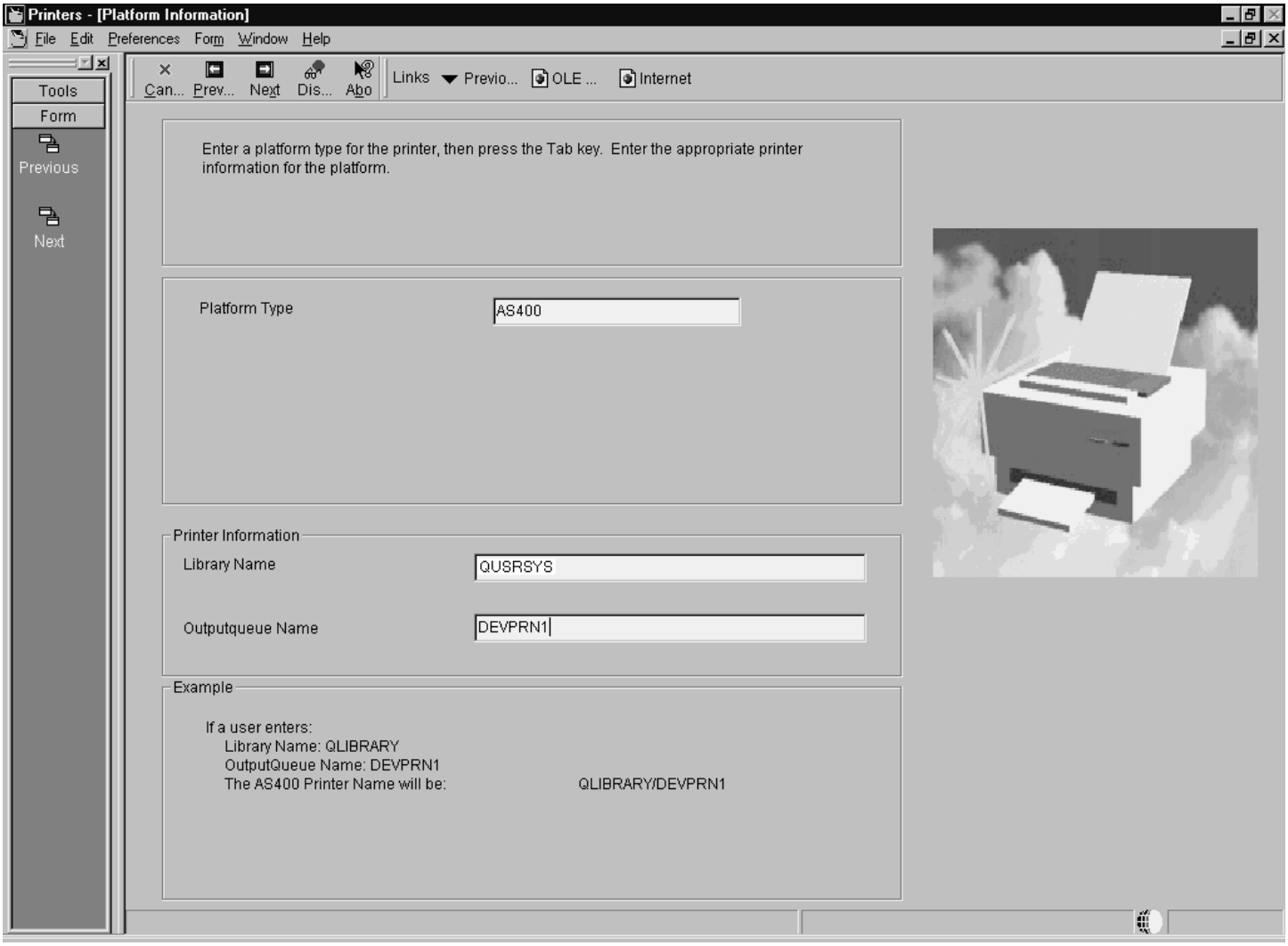
1. On the Printers menu (GH9013), select Printers (P98616).

   The Printers form appears.
2. On the Printers form, click Add Printer.

   The welcome page for the Printer Setup director appears. This page describes the tasks that the director helps you perform.

3. Review the welcome page and click Next.

   The Platform Information form appears. The platform type may appear by default, depending on the operating system on which *Release 9.2* is running.


Printers - [Platform Information]
File Edit Preferences Form Window Help
Tools
Form
Previous
Next
Can... Prev... Next Dis... Abo
Links Previo... OLE ... Internet
Enter a platform type for the printer, then press the Tab key. Enter the appropriate printer information for the platform.
Platform Type
AS400
Printer Information
Library Name
QUSRSYS
Outputqueue Name
DEVPRN1
Example
If a user enters:
Library Name: QLIBRARY
OutputQueue Name: DEVPRN1
The AS400 Printer Name will be:
QLIBRARY/DEVPRN1

4. On Platform Information, complete these fields:

Field	Description
Platform Type	Enter the platform type on which you are installing or use the visual assist button to select a platform type.
Library Name	The physical printer name must be the same as the outqueue name. If you use the default QGPL library to store your outqueues, you need only enter the outqueue name in this field. Valid characters are all alpha (A-z), numeric (0-9), at (@), and underscore (_).
Ouputqueue Name	If your outqueues reside in a library other than the default QGPL library, you need to enter the library name and the outqueue name in this field. For example, QUSRSYS\DEVDES3A. Valid characters are all alpha (A-z), numeric (0-9), at (@), and underscore (_).

5. After you complete the requisite fields, click Next to access the Printer Setup form.

   Use this form to set information for the printer such as the printer model, physical location of the printer, printer definition language (PDL), and paper types.
6. On the General tab, complete these fields:
   - Printer Model
   - Printer Location
7. On the Details tab, in the box labeled Printer Definition Language, select one of these options:
   - PostScript
   - PCL
   - Line Printer
   - Custom
8. In the Default box, specify one of the Printer Definition Language options as the default value.

   You can select multiple PDLs, but only one default PDL. A user can override this default PDL at the time a batch process is submitted.

   Choosing PostScript or Printer Command Language (PCL), *Release 9.2* disables the Line Printer option. Choosing Line Printer, *Release 9.2* disables the PostScript and PCL options.

   When choosing the Line Printer option, this logic occurs:
   - *Release 9.2* disables the grid at the bottom of the form and any paper types you have chosen are cleared.

     JD Edwards EnterpriseOne automatically provides a printer type of *JDE LINE PAPER for the printer.
   - The Fields in the box labeled Line Printers are used to set the paper dimensions and line parameters.

     This procedure is explained in later steps in this section.

   The custom option uses advanced features of the printers application, which are explained in the later steps in this procedure.

9. On the Details tab, when choosing the PostScript option, the Paper Source box appears and you can change these options:

Field	Description
Max Number of Paper Sources	Enter a numeric value in this field to indicate the number of paper trays this printer has available.
Default Paper Source	Enter a numeric value in this field to indicate which tray number you want *Release 9.2* to draw paper from as the default tray.

10. On the Details tab, when choosing the Line Printer option, fields appear in a box labeled Line Printers, which you use to set the paper dimensions and line parameters.

    Complete these fields:

Field	Description
Characters Per Inch	Enter a value to specify the number of characters in one horizontal inch.
Columns Per Page	Enter a value to specify the number of characters in one line of text in the specified report.
Lines Per Inch	Enter a value to specify the number of lines of text in one vertical inch.
Lines Per Page	Enter a value to specify the number of lines of text on one printed page.
Printer Paper Width	Displays a value that is calculated automatically based on the values entered in the Line Printers box.
Printer Paper Height	Displays a value that is calculated automatically based on the values entered in the Line Printers box.

11. On the Details tab, the Custom option lets you specify a conversion filter to use.

    When choosing the Custom option, a field appears beneath the Custom checkbox. Enter the name of the conversion filter you want to use or use the visual assist to select a filter from the Conversion Program Search and Select form.

12. If you do not want to change or add a conversion filter, skip to Step 16 in this task.

    To change or add a conversion filter, from the Form menu, select Advanced, and continue with the steps in this procedure. The Advanced option is enabled only when Custom has been chosen.

    The Work With Conversion Programs form appears.

13. Either click Add, or highlight one of the filters and click Copy or Select.

    The Advanced Conversion Program form appears.
14. Change one or both of these fields:

Field	Description
Conversion Program	If you clicked Add or Copy on the previous form, the Conversion Program field is enabled. Enter the name of the conversion program that you want to add or copy. When making a copy, the Parameter String field is populated with the string that you highlighted on the previous form.
Parameter String	The *JD Edwards EnterpriseOne* system automatically enters the parameter string in native commands based on the host type from which you are printing and the type of printer (PostScript, PCL, or line). For example: `-s string_name -l library_name -f convertPDFToPS` where -s defines the string name, -l (the letter l, not the numeral 1) defines the library name, and -f defines the function name.

15. Click OK.

    The Work with Conversion Programs form appears.

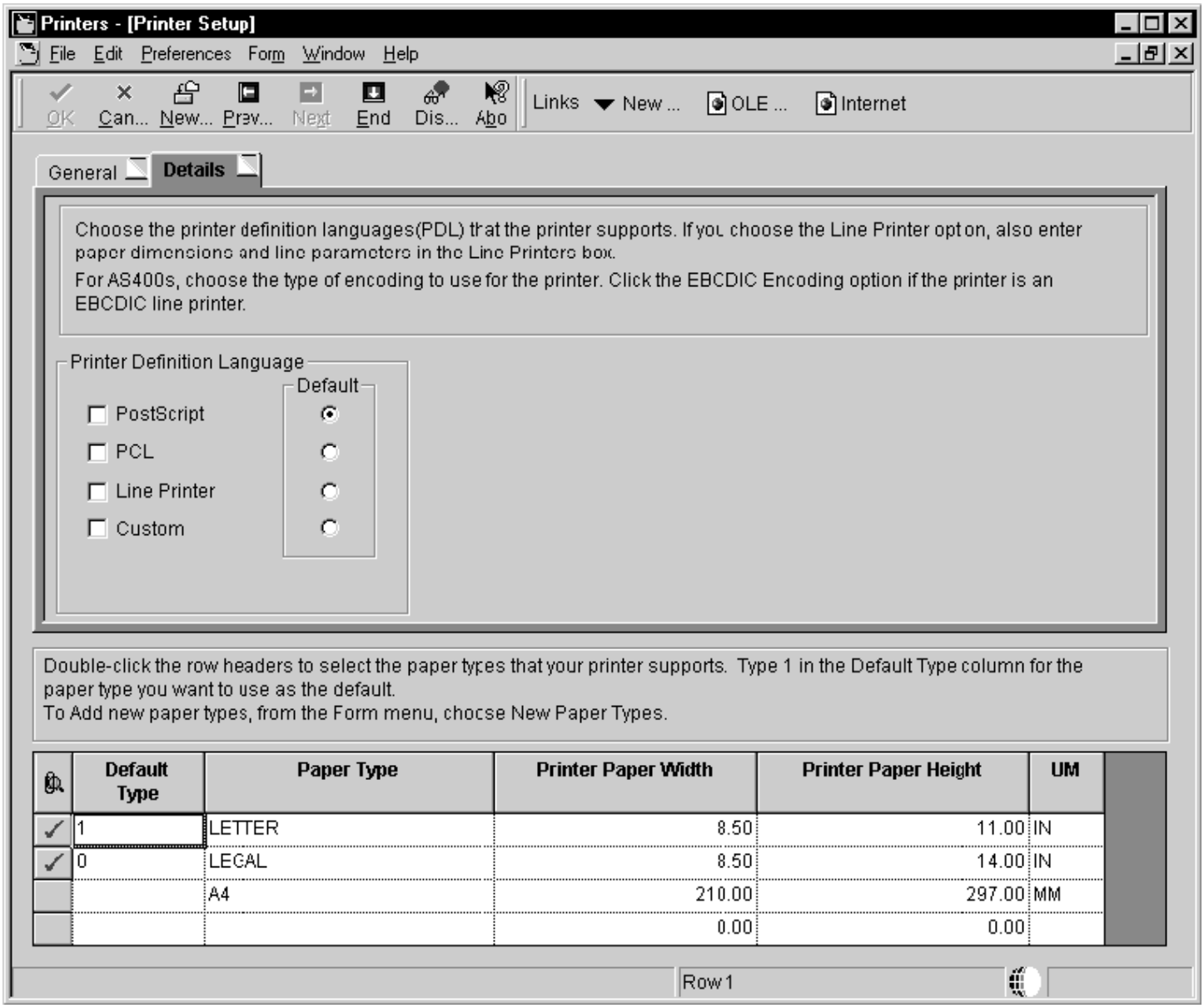
    Click Close.

    The Printer Setup form appears.
16. In the grid at the bottom of the Printer Setup form, double-click the row header for each paper type that your printer supports. A checkmark appears in the row header for each paper type that you select.

    Note: You can add new paper types as necessary. Instructions are included later in this task.

17. In the Default Type column, enter the numeral *1* in the row for the paper type you want to use as the default.

    select only one paper type as the default. A user can override the default paper type when a batch process is submitted.


Printers - [Printer Setup]
File Edit Preferences Form Window Help
OK Can... New... Prev... Next End Dis... Abo
Links New ... OLE ... Internet
General
Details
Choose the printer definition languages(PDL) that the printer supports. If you choose the Line Printer option, also enter paper dimensions and line parameters in the Line Printers box.
For AS400s, choose the type of encoding to use for the printer. Click the EBCDIC Encoding option if the printer is an EBCDIC line printer.
Printer Definition Language
Default
PostScript
PCL
Line Printer
Custom
Double-click the row headers to select the paper types that your printer supports. Type 1 in the Default Type column for the paper type you want to use as the default.
To Add new paper types, from the Form menu, choose New Paper Types.
Default Type
Paper Type
Printer Paper Width
Printer Paper Height
UM
1 LETTER 8.50 11.00 IN
0 LEGAL 8.50 14.00 IN
A4 210.00 297.00 MM
0.00 0.00
Row 1

18. To add a new paper type, continue with these steps:
19. From the Form menu, select New Paper Type.

    The Work With Paper Types form appears.
20. Click Add.

    The Paper Type Revisions form appears.
21. Complete these fields:

    - Paper Type
    - Paper Height
    - Paper Width
    - Unit of Measure

    The software saves the new paper type.
22. Click OK to return to the Work With Paper Types form, and then click Close to return to Printer Setup.

    The new paper type is available in the grid on the Printer Setup form. All previous paper type selections are cleared and must be reselected if you want to use them again.
23. When finished entering information for the printer on the Printer Setup form, click End.

    Release 9.2 saves the new printer setting and returns you to the first form in the Printers application.

Field	Description
Platform Type	Define the type of physical hardware on which the database resides.
Server Name	Define the computer that receives documents from clients.
Printer Name	Enter a name that refers to a shared resource on a server. Each shared directory on a server has a share name, which is used by clients to refer to the directory.
Printer Model	Define these attributes for your printer: - Printer Model - Printer Location Designates the physical location of the printer - Encoding
Paper Type	Enter a user defined code (H98\PT) to define the type of printer paper, such as letter or legal. For example, LETTER, LEGAL, and A4.
Paper Width	Define the width of the paper for this paper type. This value is in the unit of measure specified by Unit of Measure.

Field	Description
Paper Height	Define the height of the paper for this paper type. This value is in the unit of measure specified by Unit of Measure.
Unit of Measure	Enter a user defined code (00\UM) to define the quantity in which to express an inventory item. For example, CS (case) or BX (box). Form-specific information indicates the unit of measure in which the paper height and width are entered. For example, IN = Inches and MM = Millimeters.
Columns Per Page	Define the number of columns per page. For example, 80 or 132.
Characters Per Inch (CPI)	Define the horizontal printing density in characters per inch. You should only define values that are supported by your printer.
Line Per Page	Define the number of lines per page. For example, 60 or 66.
Line Per Inch (LPI)	Define the line spacing in lines per inch. You should only define values that are supported by your printer. Values are: 4 - IBM 5219, 5224, 5225, and 3287 printers only 6 - IBM 5224 printer only 8 - IBM 5224 printer only 9 - IBM 5225 printer only **Note:** The standard computer print is 6 LPI and 10 CPI. If you are printing on 8 1-2-inch x 11-inch paper, typically you would specify 8 LPI and 15 CPI.
Maximum Number of Output Tray	Define the maximum number of paper trays available on the printer you are setting up.
Output Tray Name	Define the output tray for a given batch print job.

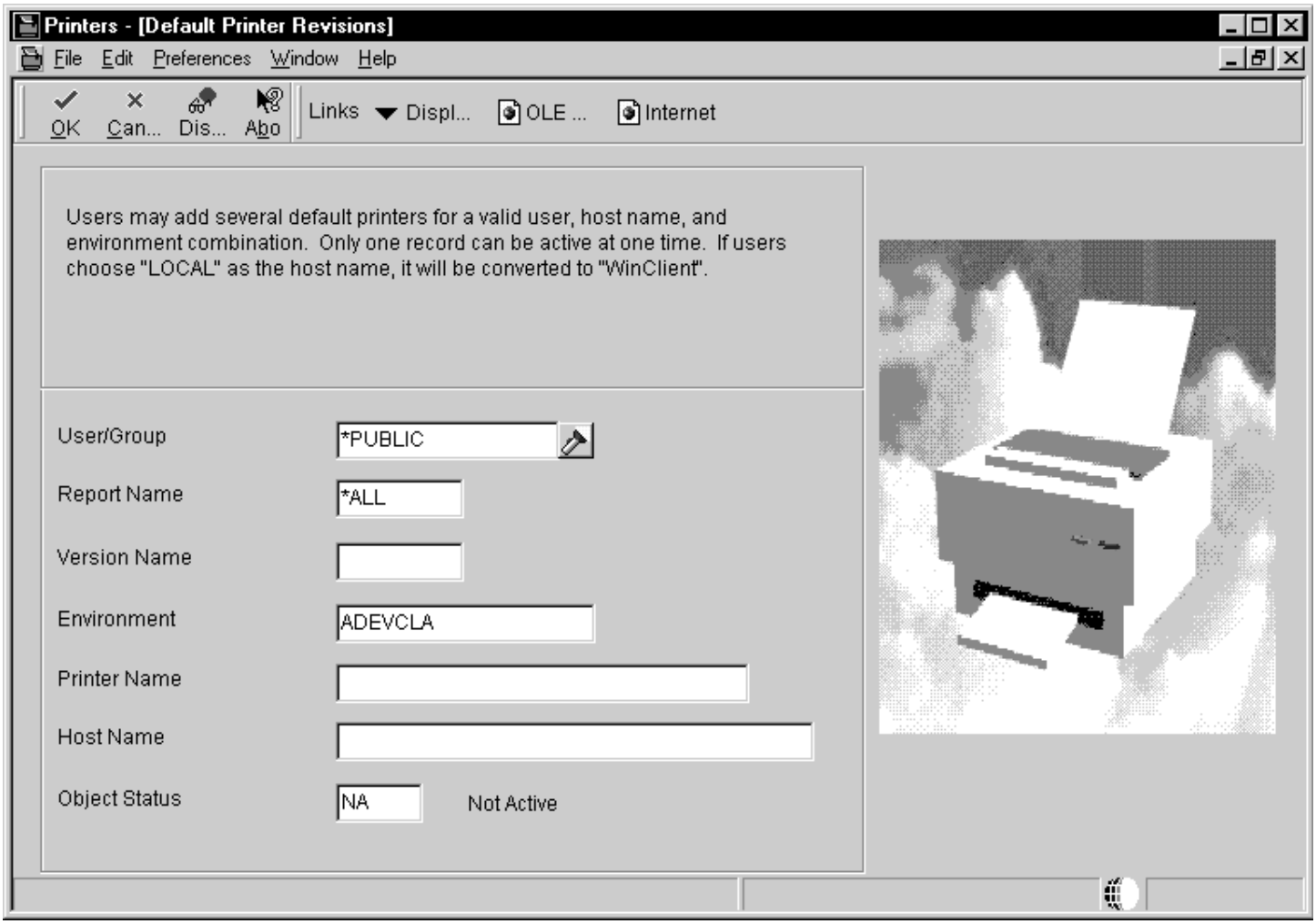
Defining a Default Printer

To define a default printer:

1. On the Printers menu (GH9013), select the Printers (P98616) program.

2. On the Printers form, click Define Default Printer.

   The Work With Default Printers form appears.
3. Click Add.



4. On Default Printer Revisions, complete these fields:

Field	Description
User/Group	Click the visual assist to select either a particular user for this printer or to select an entire group.
Report Name	Click the visual assist to select a specific report to print. Enter *ALL for all reports.
Version Name	Click the visual assist to select a specific report to print. If the value in the Report Name field is *ALL, the system populates the Version Name field with the default value of *ALL and makes the field unavailable for subsequent modification.
Environment	*JD Edwards EnterpriseOne* provides a default value for this field based on the environment that you are currently logged onto. Enter *ALL for all environments. You can change this information.
Printer Name	Enter the name of your printer.
Host Name	Enter the name of the host server where reports will be processed. The visual assist displays the appropriate host names based on the printer name you select. To use this printer for all hosts in your environment, enter *ALL.
Object Status	Define the new printer as the default printer by changing its status to active. If an error occurs, it means that another printer is currently the active default. Change the original default printer to inactive before making the new printer active. Change multiple statuses from the Work With Default Printers form, as explained at the end of this task.

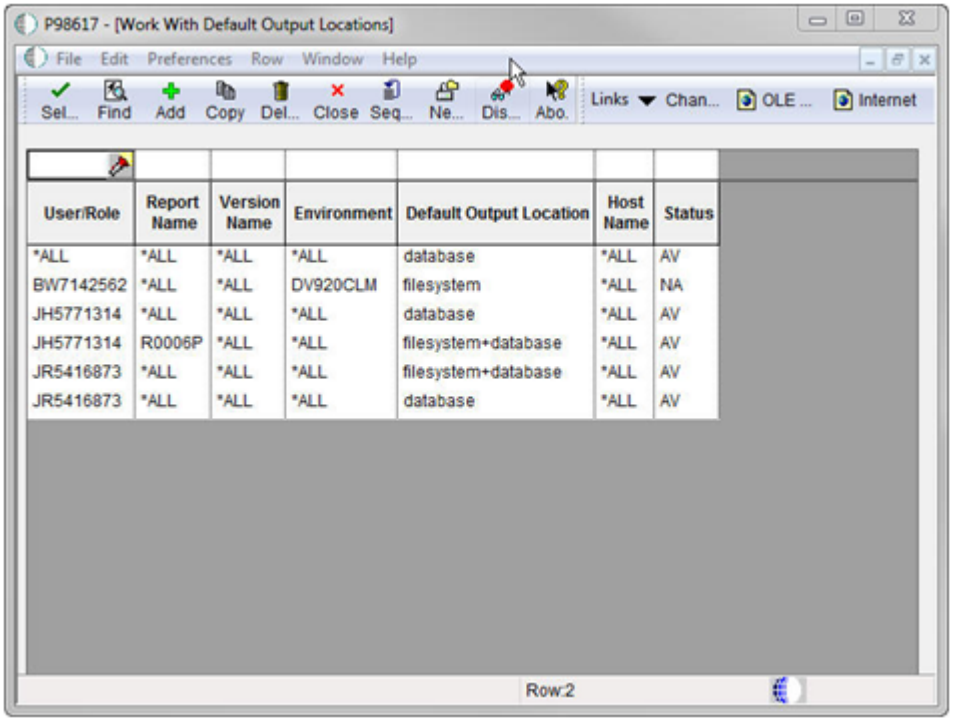
5. Click the **OK** button, and then click the **Cancel** button to access the Work With Default Printers form.
6. To change the status of a default printer, select a default record and, from the Row menu, select Change Status.

   If another printer is already set as the active default, an error occurs. To change the original default printer to inactive, select it, select Change Status on the Row menu, and then select the new printer as the default.

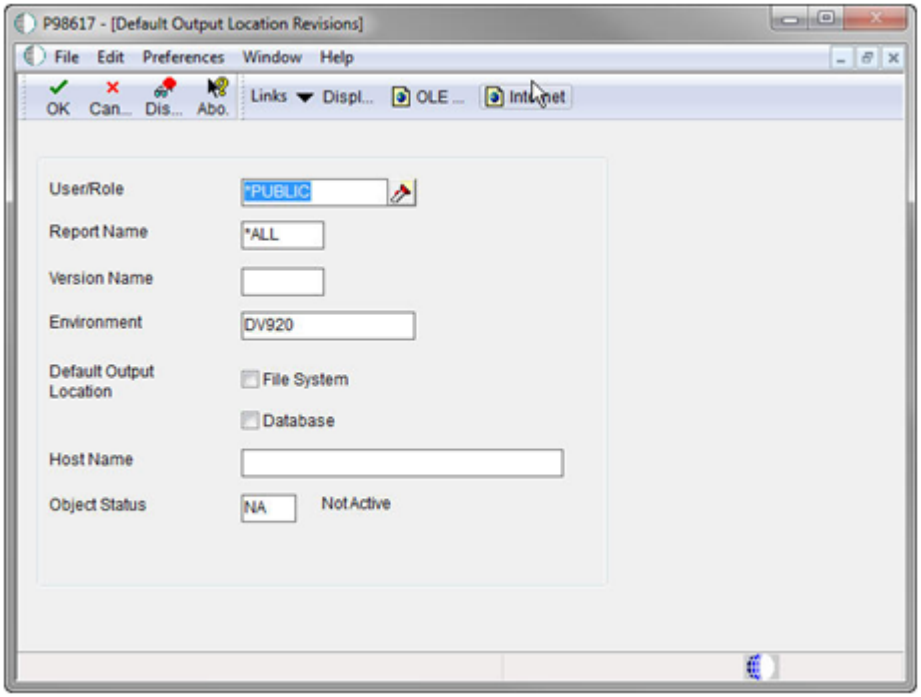
Defining a Default Output Location (Tools Release 9.2.1)

To define a default output location:

1. On the Batch Processing Setup menu (GH9013), select the Default Location (P98617) program.



2. On Work With Default Output Locations, click the **Add** button.



3. On Default Output Location Revisions, complete these fields:

Field	Description
User/Group	Click the visual assist to select either a particular user for this default output location.
Report Name	Click the visual assist to select a specific report for the default output location. Enter *ALL for all reports.
Version Name	Click the visual assist to select a specific report for the default output location. If the value in the Report Name field is *ALL, the system populates the Version Name field with the default value of *ALL and makes the field unavailable for subsequent modification.
Environment	*JD Edwards EnterpriseOne* provides a default value for this field based on the environment that you are currently logged onto. Enter *ALL for all environments. You can change this information.
Default Output Location	You can select File System or Database or both.
Host Name	Enter the name of the host server where reports will be processed. The visual assist displays the appropriate host names based on the default output location you select. To use this default output location for all hosts in your environment, enter *ALL.

Field	Description
Object Status	Define the default output location as active by changing its status to active. If an error occurs, it means that another output location is currently the active default. Change the original default output location to inactive before making the new default output location active.

4. Click the **OK** button, and then click the **Cancel** button to access the Work With Default Output Locations form.
5. To change the status of a default output location, select a default record and, from the Row menu, select Change Status.

   If another default out location is already set as the active default, an error occurs. To change the original default output location to inactive, select it, select Change Status on the Row menu, and then select the new output location as the default.

Setting the Compiler Flag (IBM AIX on IBM i Systems Only)

Note: This section is only applicable to UNIX systems running on IBM AIX on IBM i systems.

In order to avoid Package Build failures, you must modify your ***JDE.INI*** as described in this procedure.

To set the compile flag on AIX systems:

1. Open the ***JDE.INI*** on your Enterprise Server using an ASCII editor such as **vi**.
2. Update the values of the **LinkFlags** setting in the **[BSFN BUILD]** section to add **-ltextsearch** to the list of libraries to be loaded. For example:

```
LinkFlags=-bI:${INSTALL_PATH}/system/bin32/funclist.imp -bM:SRE -bexpall
-brtl -lc -lm -bnoentry -L. -L${INSTALL_PATH}/system/lib -ljdelib
-lcallobj -lerror -lgentext -ljdb -ljde_erk -ljdecache -ljdeddapi
-ljdeknet -ljderepl -ljdeschr -ljdesec -ljdespec -ljdetam -llanguage
-lmisc -lpackage -lport -lqueueknl -lruntime -lsrc -ltransmon -lube
-lworkflow -ljdesaw -ljdenet -lowver -ljdeunicode -lv_verify
-lxerceswrapper -ltextsearch -bloadmap:loadmap
```

Enabling Multiple Concurrent Table Conversions

If you are planning to run your Table Conversions on the Enterprise Server, you must set specific values in the ***JDE.INI*** ***jde.ini*** on your Enterprise Server in order to enable multiple Table Conversions to run simultaneously.

To enable multiple concurrent table conversions:

1. Open the ***JDE.INI*** ***jde.ini*** on your Enterprise Server using an ASCII editor compatible with the operating system.
2. Add or update the following entries and their respective values in the **[JDEIPC]** section:

```
[JDEIPC]
```

```
maxNumberOfResources=2000
maxNumberOfSemaphores=1000
```

Note: The above values are sufficient to run four Table Conversions at once. To run more, you may need to increase these values. The symptom of the values being set too low is that the Table Conversion will fail almost immediately on the server with this error message in its **jde.log**:

```
IPC2100004 ... maxNumberOfResources parameter (2000) exceeded on
allocation of IPCData. Please increase it in INI.
```

If you plan on running more than four concurrent Table Conversions, refer to the *JD Edwards EnterpriseOne Tools Runtime Administration Guide* for details on calculating the correct values for the anticipated workload on your machine.

8 Installing the Development Clients for Developers and System Administrators

Understanding Development Client Installation

Release 9.2 software for Development Clients is first installed on the Deployment Server, and then deployed from the Deployment Server to Development Clients for developers and system administrators.

The Development Clients are Microsoft Windows-based machines. Refer to the Oracle Certifications for specifically-supported versions of Microsoft Windows.

> **Note:** The *JD Edwards EnterpriseOne* installation of the Development Client delivers pre-built packages that are ready for use as delivered. In order for the Development Client to reflect the language installed on the Deployment Server, you must perform tasks for both the Enterprise Server and Development Clients, in addition to the procedures to verify and modify the `JDE.INI` on the Development Clients and the `JDE.INI` `jde.ini` on the Enterprise Server.

See Also

- Refer to the section of this guide entitled: *Language Process Overview* for more information about how you enable multilingual installations on Development Clients.
- *JD Edwards EnterpriseOne Development Client Installation Guide*
- *JD Edwards EnterpriseOne Tools Package Management Guide*

Preparing for Development Client Installation

To prepare for the installation of *Release 9.2* on Development Clients, you must modify the Development Client `JDE.INI` on the Deployment Server and the JD Edwards EnterpriseOne system administrator must create a user profile for every user before that user can log on to *Release 9.2* . You must also copy the configured `tnsnames.ora` from the `oracle\E1local` directory to the `\client` directory on the Deployment Server, as specified in the next section of this chapter entitled: *Working With Development Client Installation*

> **Note:** Refer to the *JD Edwards EnterpriseOne Development Client Installation Guide* for additional details on installing the Development Client.

Prerequisites

- Uninstall the previous software version on each Development Client before installing the new version. See *Uninstalling the Software* for more information about uninstalling previous releases of *JD Edwards EnterpriseOne* .
- Before installing *Release 9.2* on a Development Client used for development, you must install the Microsoft Visual C++ Compiler. The specific version of the compiler is detailed in the Minimum Technical Requirements

(MTRs). Refer to the section of this guide entitled: *Accessing Certifications*. Also refer to the appropriate Microsoft documents for installation information.

- The names of the Deployment Server, Enterprise Server, and the Development Client cannot exceed 15 characters in length.
- IPv4 Requirement

  The Development Client requires Microsoft Windows IPv4 for connectivity. It cannot function with IPv6. Refer to the *JD Edwards EnterpriseOne Development Client Installation Guide for Oracle WebLogic Server (WLS) and WebSphere Application Server (WAS) Express* details.

Note: You must have full administrator privileges to install *Release 9.2* on the Microsoft Windows 7-based Development Clients. For details, refer to the *JD Edwards EnterpriseOne Development Client Installation Guide* on the Oracle Technology Network (OTN).

During Development Client installation, connectivity is required for:

- Read/write access to this client install directory on the primary Deployment Server in the base location:

  \oneworld
- Read access to the subdirectories located under this directory:

  \pathcode\package

  For example:

  \\deployment_server_name\ *E920* \ *PD920* \package
- Read/write access to this directory on the primary Deployment Server:

  \client

  For example:

  \\deployment_server_name\ *E920* \client
- Refer to the *JD Edwards EnterpriseOne Deployment Server Reference Guide for Enterprise Systems for Microsoft Windows* in *Setting Up a Development Client Installer on the Deployment Server* for these topics:
  - *Understanding the JD Edwards Clients (Development and Web)*
  - *Understanding the Oracle Universal Installer*
  - *Creating the Web Development Feature*
  - *Copying JDBC Drivers and the tnsnames.ora file to the Deployment Server*
  - *Updating the Database Drivers in the JDBJ.ini File*
  - *Copying the JDK to the Deployment Server*
  - *Updating the InstallManager.htm File*
  - *Updating the oraparam.ini File*
  - *Setting Up Local Database Installers*

- Refer to the *JD Edwards EnterpriseOne Development Client Installation Guide for Oracle WebLogic Server (WLS) and WebSphere Application Server (WAS) Express* for these topics:
  - *Understanding the Development Client Installation*
    This section describes *Understanding Installation Steps* and *Understanding Destination Paths* .
  - *Installing WebSphere Express 7.0 or WebSphere for Developers 7.0*
  - *Installing the Local Database*
  - *Installing the Development Client*
  - *Working With SnapShot on the Development Client*
  - *Deinstalling the Development Client*
  - *Removing the Local Database*
  - *Troubleshooting the Installation Process*
  - *Installing a Development Client from the Command Line*
  - *Manual Cleanup of a Deinstalled Development Client*
  - *Manual Cleanup of a Deinstalled Oracle Database*
  - *Installing Multiple Pathcodes*

Working With Development Client Installation

The Development Client installation program copies all necessary components of *Release 9.2* to a Development Client. During installation, the installation program verifies that enough disk space exists and, if not, you are prompted to create more space before continuing.

> **CAUTION:** Before starting a *JD Edwards EnterpriseOne* Development Client installation, you must close all other applications running on that machine. The installation process may not run correctly if other applications are open.

This section discusses these topics:

- *Creating a Desktop Shortcut*
- *Using a Shared Drive*
- *Understanding Third-Party Products*

Creating a Desktop Shortcut

A system administrator can create a shortcut to `InstallManager.exe` from the *JD Edwards EnterpriseOne* client install directory on the Deployment Server and can deploy the shortcut to the Development Client. For example, the client install directory is typically:

`\JDEdwards\ E920 \OneWorld Client Install`

To ensure that the shortcut works correctly, ensure the Start in: field contains the location of the `installmanager.htm` file.

To create a desktop shortcut:

1. To edit the **Start in:** field, in Microsoft Windows Explorer or on the desktop, right-click the shortcut.

2. Click **Properties**, and then click the Shortcut menu.
3. Double-click the *Release 9.2* InstallManager shortcut to start the *Release 9.2* installation manager.
4. Skip to the next task entitled: *Using a Shared Drive*.

Using a Shared Drive

An installer can connect to the `\JDEdwards\ E920` shared drive on your Deployment Server from Microsoft Windows Explorer.

To use a shared drive:

1. Double-click `InstallManager.exe` to start the *Release 9.2* installation manager.

   The `InstallManager.exe` file is located in this folder:

   ```
   OneWorld Client Install
   ```
2. On *JD Edwards EnterpriseOne Release 9.2* Installation Manager, click the EnterpriseOne E920 Client link.
3. On Welcome, click the **Next** button.

   If you do not have the latest version of Microsoft Internet Explorer the *Release 9.2* Setup Third Party Application form appears. The option to install Internet Explorer is selected. To install this application, click the **Next** button. If you do not want to install these applications at this time, clear the option for one or both of them, and click the **Next** button.

   If the latest version of Internet Explorer are already installed, the Third Party Application form is not displayed.
4. On Package Selection, select the package you want to install and click the **Next** button.

   > **Tip:** Click the **Filters ON** button to narrow the displayed list of available packages. This can help you find the package you want. Notice that a short description of each package appears below the list.

5. On Setup Type, complete these fields:

Field	Description
Select Setup Type	Select Development or Production objects. You should only select the Development option if you intend to develop *Release 9.2* applications. **Note:** Select the Development option only if you intend to develop *JD Edwards EnterpriseOne* applications.
Install Path	Select the drive and directory in which to install the package. For example, this is the typical path for *Release 9.2* : `c:\ E920`

6. To install the package, click the **Finish** button.

   InstallManager shows the status of the installation process through a series of forms.

   The Congratulations form indicates that the installation finished successfully. InstallManager creates a *Release 9.2* shortcut in the Programs folder of your Start menu and on your desktop.
7. Reboot if necessary.

> **CAUTION:** The *JD Edwards EnterpriseOne* Development Client installation process verifies that several of the system DLL files are current. If they are not current, you receive a message to reboot your system. When you reboot, the system updates the DLL files in your Microsoft Windows directories.

Understanding Third-Party Products

A local Oracle Enterprise Edition (OEE) is required for *Release 9.2* Development Clients. The OUI installer for the Development Client installs OEE and the Development client separately. Refer to the *Development Client Installation Guide* .

The use of Microsoft Internet Explorer is optional. Adobe Acrobat Reader 6.0 or greater is strongly recommended to view reports online. Neither the browser or reader applications are delivered with the *JD Edwards EnterpriseOne* Applications *Release 9.2* installation.

Microsoft Internet Explorer provides:

- An option for a Web-like menu view within *JD Edwards EnterpriseOne* Explorer.
- An option for an Internet connection capability directly from the *JD Edwards EnterpriseOne* Explorer interface.

Understanding User Profiles and Languages

> **Note:** *Release 9.2* supports group preferences for user profile Development Client configuration and environment assignment.

For user and group profiles, you should use the preloaded users to perform the installation process. The system administrator needs to create a user profile before the user can log on to *Release 9.2* .

All users are assigned a language preference code within the user profile. The language preference code field specifies which language is presented on the applicable form or report. You can set up your users and groups when determining how groups are to be organized and what preferences each group shared to have.

For languages, the `JDE.INI` on the Windows-based Deployment Server are updated automatically. For multiple language usage, both the Enterprise Server and Development Client `JDE.INI` `jde.ini` need to be modified for the preferred language being installed.

Existing user profile configurations are set up after the upgrade process finishes. You should add any new environments to these users as needed.

See Also

- *JD Edwards EnterpriseOne Tools Runtime Administration Guide* for more detailed information about setting up group profiles and how to use them, as well as for information about defining user display preferences.

9 Performing Merges

Performing Merges

Except where noted in the text, the information in this chapter applies to upgrade and cumulative update customers only. You can run any of the merges in two ways:

- Proof mode creates merge reports, but does not update control tables. Use proof mode to examine the changes that are reported without updating your tables.
- Update mode creates merge reports and updates items in the control tables.

Tip: Check each merge as it finishes to make sure it completed successfully. Also, save your logs in case you have to troubleshoot problems.

Working with Control Table Merges

This section describes:

- *Working with Customer Base Merges*
- *Working with Language-Specific Table Merges*
- *Working with Data Dictionary Merge*
- *Work with Solution Explorer Merge*
- *Working with UDC Merge*
- *Working with Favorites Merge*
- *Working with Report Director Templates Merge*
- *Working with Tips of the Day Merge*
- *Working with Workflow Merge*

The basic structure of *Release 9.2* software consists of control tables. These tables organize and sequence the information you put into the *JD Edwards EnterpriseOne* systems. In addition, these tables determine the types of operations to be performed on the input data. For example, the data dictionary tables define all specifications for any data item in *JD Edwards EnterpriseOne* software.

Control tables differ from transaction tables in the following ways:

- Control tables contain data that is shared between *JD Edwards EnterpriseOne* and the customer.
- Transaction tables can be converted, but *JD Edwards EnterpriseOne* data is never merged into them.

A customer can modify control tables, for example, changing a menu to better suit business needs. Because customers can modify the control tables, *JD Edwards EnterpriseOne* provides a safe mechanism to merge these control tables with the new data that accompanies a new release. This protects the customer-modified information.

Working with Customer Base Merges

In a customer base merge, a *JD Edwards EnterpriseOne* change table is merged into the customer control tables. Change tables store information related to control table data that has been changed or added into *JD Edwards EnterpriseOne* since the last release. This information can show detail such as how a menu has changed. The customer base merges look for changes from one base release to the next base release, for example, *Release 8.9* to *Release 9.2* , and update the customer *Release 8.9* tables with the new information from *Release 9.2* .

The upgrade performs these customer base merges:

- Data dictionary merges
- User-defined code merges
- Solution Explorer merges
- Favorites merges
- Report director templates merges
- Tips of the day merges
- Workflow merges

For some merges, you can also specify data selection criteria. This feature lets you choose the information to merge into the *Release 9.2* control tables. The ability to limit the information merged reduces the total merge time required.

Working with Language-Specific Table Merges

This information is only for users who are installing an alternate language. The distributed language tables consist of control tables, system tables, and data dictionary tables.

- The F91100D table must be loaded to display the text from these tables in the desired language
- The F98800D and F98810D tables must be loaded to display text from these tables in the desired language.
- The F83100 and F83110 tables must be loaded to display soft code text in reports

Working with Data Dictionary Merge

Note: This merge is for upgrades and cumulative updates.

The Data Dictionary Merge (R989200P) program updates the customer-specific data dictionary tables by using a combination of information from the new *Release 9.2* data dictionary tables and the change tables in the planner database. It runs during the Installation Workbench phase.

For installation customers only, the Data Dictionary Merge program copies changes made to *IBM i* data dictionary items into the *Release 9.2* data dictionary tables. After you run the Installation Workbench, you run a specification update program to convert the relational database records into the System Local replicated objects. This process includes the Data Dictionary Specification merge (R98722C) and Data Dictionary Text merge (R98722T) programs. You should run these programs to merge your modified *IBM i* data dictionary files with the *Release 9.2* relational database tables, and then into the replicated tables that will be used by each Development Client and logic server.

The *Release 9.2* data dictionary tables are stored as follows:

- The following pristine data dictionary tables are stored in a relational database.

  Changes made to the data dictionary items that will be replicated to other Development Clients must be made here.

  - F9200
  - F9202
  - F9203
  - F9207
  - F9210
  - F9211
  - F9212
  - F00165

- Replicated data dictionary items are stored in specification tables on each Development Client.

  These tables are the .ddb and .xdb versions of the DDDICT and DDTEXT tables that are located in the `\Spec` directory.

For installations, upgrades, and cumulative updates that include an alternate language, the Data Dictionary Text tables (GT92002, F9202, and F9203) must be loaded to display the text from these files in the desired language. The data dictionary files add the alternate language on top of the installed English records.

Work with Solution Explorer Merge

Note: This merge is for upgrades and cumulative updates.

The Solution Explorer Merge (R9690002) program updates the customer-specific Solution Explorer tables using a combination of information from the new Solution Explorer tables and the change tables in the planner database. The merge runs when you run the Installation Workbench. The menu tables are F9000, F9001, F9002, F9005, F9006, F9020, F9022, and F9050.

For users installing an alternate language, the Text Alternate Description table (F9002) contains the language records to display Solution Explorer in the desired language. This process adds the desired language on top of the already installed English records.

Working with UDC Merge

Note: This merge is for upgrades and cumulative updates.

The User-Defined Codes Merge (R9600042) program updates the customer-specific user defined codes (UDC) tables by using a combination of information from the new UDC tables and the change tables in the planner database. This merge runs when you run the Installation Workbench. The UDC tables are F0004 and F0005.

During the installation process, this merge is used only for users who are installing an alternate language.

For upgrade and cumulative update customers who are installing an alternate language, the User-Defined Codes Merge (R9600042) program merges the language UDC text. When the merge business function is run, any time a UDC Header record in the F0004 table or a UDC Detail record in the F0005 table is added, the corresponding language records are added to your UDC language tables F0004D or F0005D.

A report interconnect to run the language UDC merge is provided with this merge.

Working with Favorites Merge

Note: This merge is for upgrades and cumulative updates only.

The Favorites Merge (R96911002) program updates the customer-specific favorites table by using a combination of information from the new favorites table and change tables in the planner database. It runs during the Installation Workbench phase. The favorites table is F91100.

Working with Report Director Templates Merge

Note: This merge is for upgrades and cumulative updates only.

The Report Director Templates Merge (R96914002) program updates the customer-specific report director templates tables using a combination of information from the new report director templates tables and the change tables in the planner database. The merge runs during the Installation Workbench phase. The report director templates tables are F91400, F91410, F91420, and F91430.

Working with Tips of the Day Merge

Note: This merge is for upgrades and cumulative updates only.

The Tips of the Day Merge (R96915002) program updates the customer-specific tips of the day tables using a combination of information from the new tips of the day tables and change tables in the planner database. The merge runs during the Installation Workbench phase. The tips of the day tables are F91500 and F91510.

Working with Workflow Merge

Note: This merge is for cumulative updates only.

The Workflow Merge (R98800) program merges the *JD Edwards EnterpriseOne* workflow data shipped with a new release with the customer workflow data. The merge runs during the Installation Workbench phase.

The following list shows the workflow tables:

- F98800
- F98800D
- F98800T
- F98810
- F98810D
- F98811
- F98830
- F98840
- F98845

Note: The workflow merge may overwrite your customer-defined data, as follows:

- If you have modified a *JD Edwards EnterpriseOne* workflow process, and the new *JD Edwards EnterpriseOne* workflow process has been changed, the updated new *JD Edwards EnterpriseOne* workflow process overwrites the customer-modified workflow process.
- If the customer has created a new workflow process, and used a name that is the same as the *JD Edwards EnterpriseOne* workflow process that has been updated, the updated *JD Edwards EnterpriseOne* workflow process overwrites the customer-created workflow process with the same name.

If any customer-defined processes are in danger of being overwritten, you should copy the existing process and rename it with another version number before performing the merge.

You can check for processes to be overwritten by using proof mode with the merge.

Working with Specification Merges

This section discusses:

- *Working with Object Librarian Merge*
- *Working with Versions List Merge*
- *Working with Central Objects Merge*
- *Working with Update Language Text Merge*

This table explains what happens to the following types of objects if they have been modified by the customer when the specification merge programs run during an upgrade or a cumulative update. The table assumes the *JD Edwards EnterpriseOne* action and the customer action are on the same object.

***JD Edwards EnterpriseOne* action**	**Customer action**	**Upgrade**	**Update**
An object is modified.	No action.	No action.	Add or replace.
An object is modified.	The same object is modified.	Merge (replaces data structures and applications).	Merge (replaces data structures and applications).

***JD Edwards EnterpriseOne* action**	**Customer action**	**Upgrade**	**Update**
An object is added.	No action.	No action.	Add.
No action.	A new object is added.	Add.	No action.
No action.	No action.	No action.	No action.
No action.	The same object is modified.	Merge.	No action.
An object is deleted.	No action.	No action.	The report should contain a warning. Object Librarian should be updated to product code 88.
An object is deleted	An object is modified	The report should contain a warning, and the object is merged.	The report should contain a warning and the object is not deleted.

See Also

Object Specification Merge Report (R98700) in *Working with Reports* in this guide for more information about the reports.

For users who are upgrading an alternate language, the merge copies all text for custom objects. For modified *JD Edwards EnterpriseOne* objects, all changed or added text is copied forward to the new release.

For users who are updating an alternate language, the TAM package contains only base text. The merge replaces central objects base text with base text from the package. Translated text is not removed.

Working with Object Librarian Merge

Note: This merge is for upgrades and cumulative updates only.

During an upgrade, the Specification Merge (R98700) program carries over any previous release Object Librarian changes you have made, such as added objects and modification flags, and changed category codes, to the new Object Librarian.

During a cumulative update, the Specification Merge (R98700) program adds any Object Librarian changes, such as added objects and changed category codes, to the existing Object Librarian.

Working with Versions List Merge

Note: This merge is for upgrades and cumulative updates only.

During an upgrade, the Versions List merge (R98700) program preserves any non-XJDE and non-ZJDE (customer versions) version specifications for objects that are valid in the new release and their processing options data. This process also preserves the processing options data of ZJDE and ZJDEC version (customer versions).

During a cumulative update, the Versions List merge preserves any non-XJDE and non-ZJDE (customer versions) version specifications for objects that are valid in the new release. It also preserves their processing options data and adds new XJDE and ZJDE versions. This process also preserves the processing options data of ZJDE and ZJDEC version (customer versions) for objects that are changed.

Working with Central Objects Merge

Note: This merge is for upgrades and cumulative updates only.

Use this information only if you are installing an alternate language.

When you load an alternate language with the installation, you must load language records into the central objects tables to enable that language. The central objects tables contain the alternate language records needed for displaying text in the selected language.

Language-enabled tables include the processing text (F98306), report text (F98760) and form text (F98750). Depending upon the environment choices during the English installation, you may have several sets of central objects, for example, one set for each environment loaded during the English language installation.

Working with Update Language Text Merge

This merge is for customers who have an alternate language and are installing a cumulative update release only.

The Update Language Text Merge () program runs automatically during the Specification Table Merge Workbench. This program copies text from the language database to the central objects database. Any language text records that do not exist are added. Records that already exist are updated if the text has changed. Custom text in *JD Edwards EnterpriseOne* objects is preserved if the merge flags are set correctly in Object Librarian. This process is called automatically from the Specification Table Merge Workbench or run as a standalone option from R98700. If it is run from the workbench, the Language Plan (F_) table is used to merge each language, data source, and environment selected in the plan.

10 Performing Post Installation and Upgrade Tasks

Working With Signon Security and Table Creation Security

For initial installations of *JD Edwards EnterpriseOne* , you must setup system user(s) using the Work With System Users (P980001) program to populate the F98OWPU table. You must set up system users before you can add and associate a *JD Edwards EnterpriseOne* user to a system user using EnterpriseOne Security (P98OWSEC).

CAUTION: If you attempt to add a user with the P98OWSEC program before you add the system user through the P980001 program, the system may add an invalid record to the F98OWPU table. You might have to delete the invalid record from F98OWPU using the SQL Query tool. You must perform security setup signed on to *JD Edwards EnterpriseOne* from a deployed client. If you perform the steps signed on to the deployment server, you will not be updating the correct security tables for your *JD Edwards EnterpriseOne* system.

Note: For details on Table Creation Security, refer to the *JD Edwards EnterpriseOne Security Administration Guide* in the section entitled: *Managing Data Source Security*.

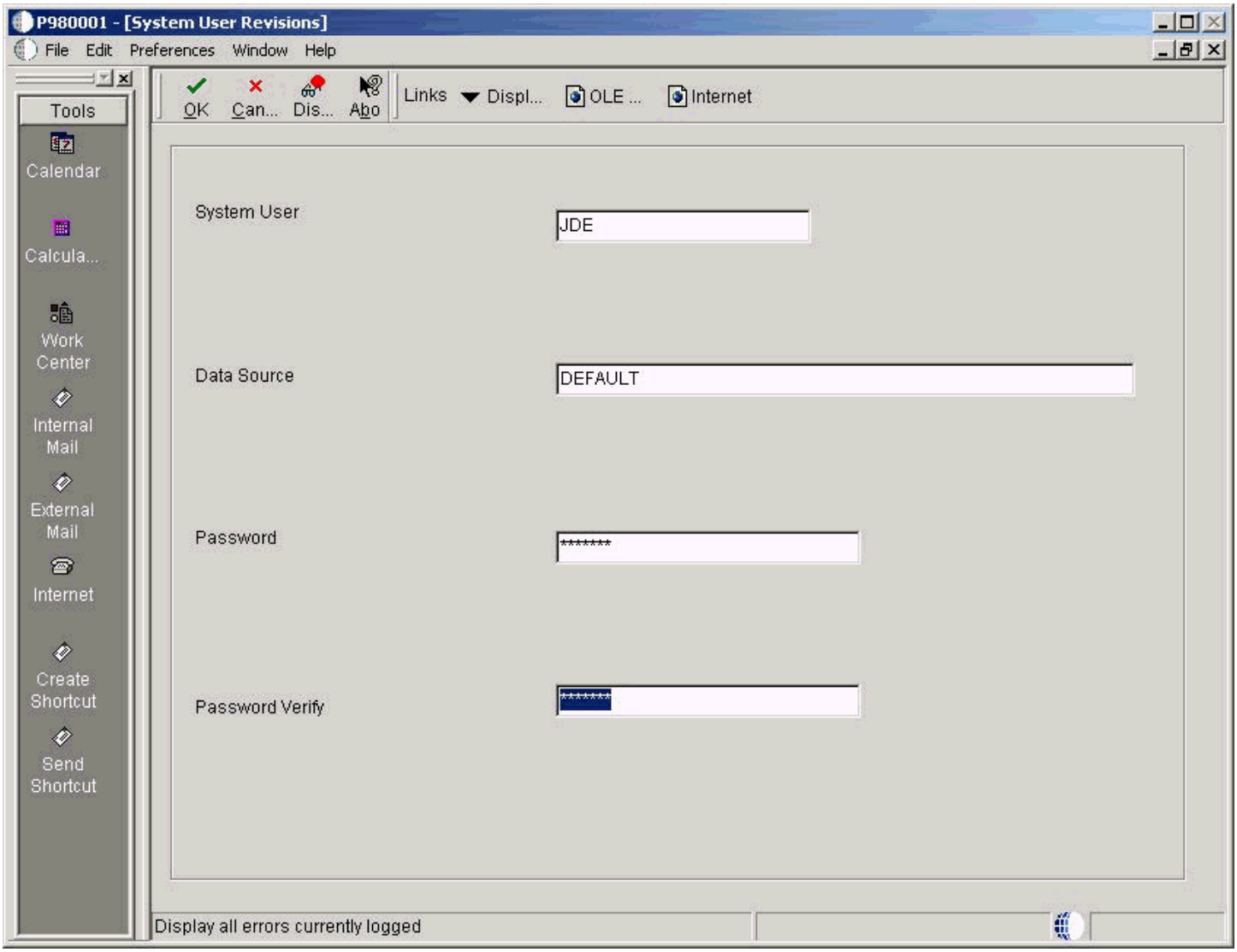
This chapter contains the following tasks:

- *Setting Up Signon Security*
- *Adding a Security Override for Running Package Build*
- *Enabling Server-Side Signon Security*
- *Enabling Client-Side Signon Security*
- *Setting Up Single Sign-on*

Setting Up Signon Security

To set up signon security:

1. On P980001 [Work With System Users], click Add.


P980001 - [System User Revisions]
File Edit Preferences Window Help
Tools
Calendar
Calcula...
Work Center
Internal Mail
External Mail
Internet
Create Shortcut
Send Shortcut
OK
Can...
Dis...
Abo
Links
Displ...
OLE ...
Internet
System User
JDE
Data Source
DEFAULT
Password
Password Verify
Display all errors currently logged

2. On System User Revisions, complete the following fields:
   - *System User*

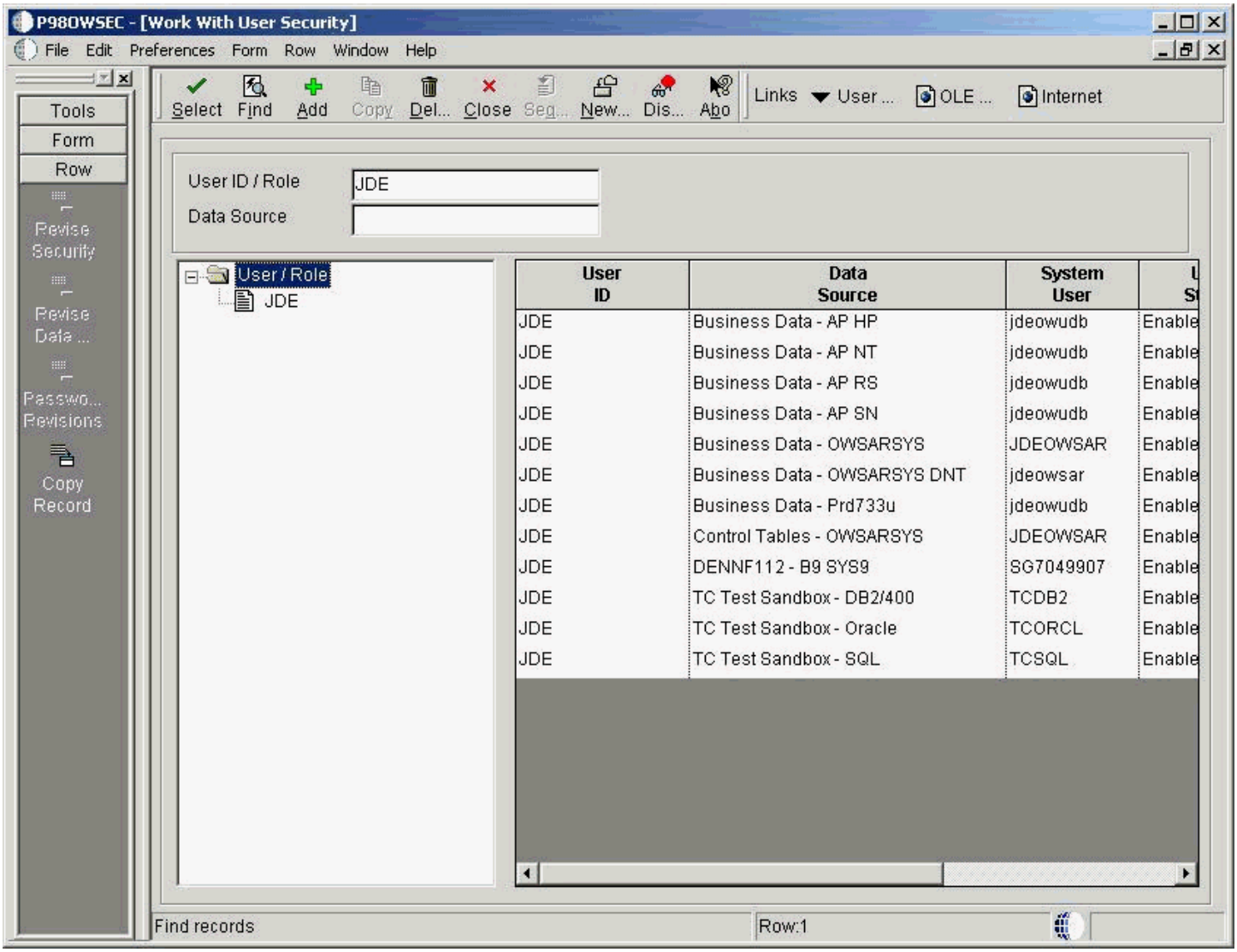
     JDE
   - *Data Source*

     DEFAULT
   - *Password*

     Enter a valid password for your installation.
   - *Password Verify*

     Enter the same password that you entered in the password field.
3. Click OK.

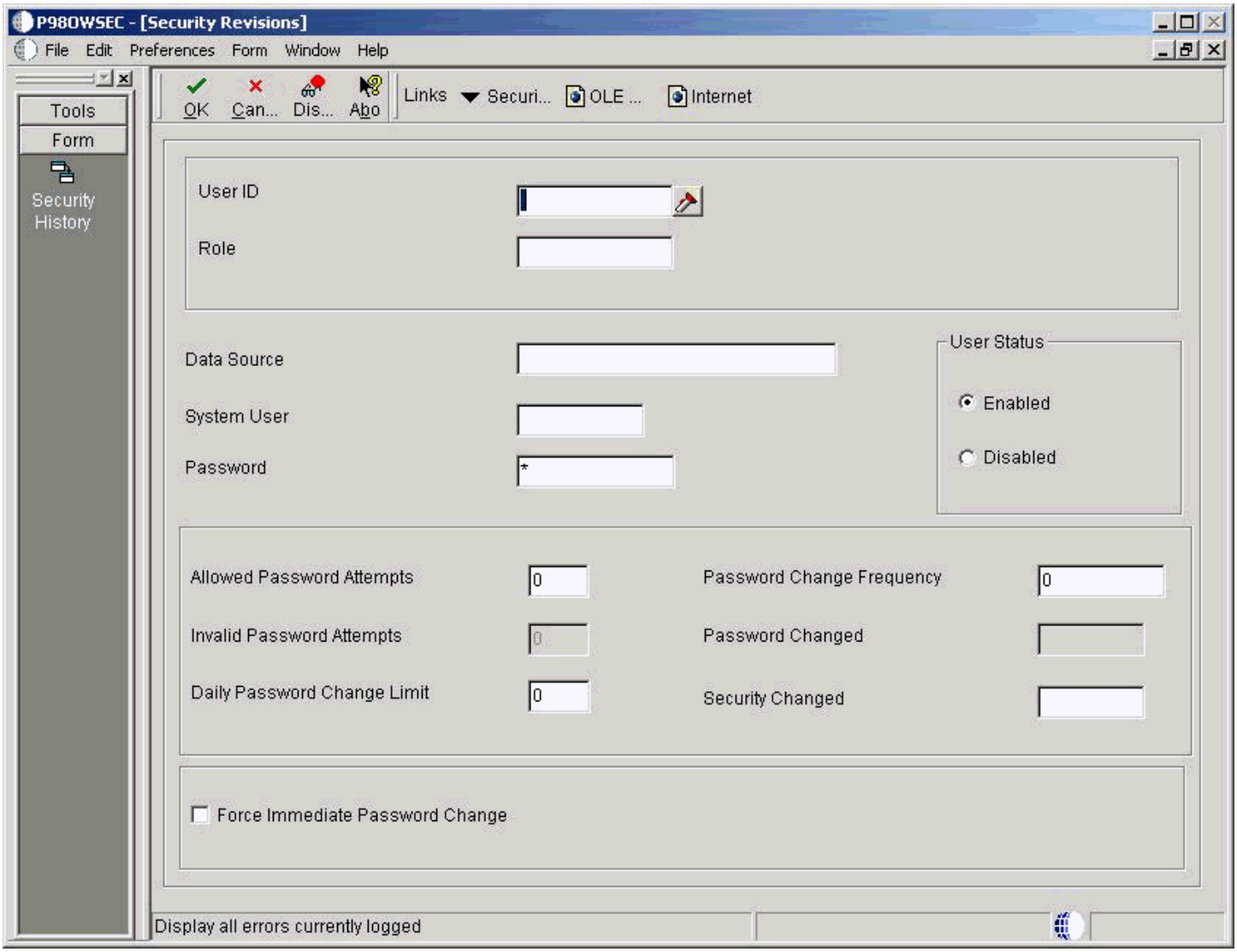
4. Click Find to verify the new record was added.


P98OWSEC - [Work With User Security]
File Edit Preferences Form Row Window Help
Tools
Form
Row
Revise Security
Revise Data ...
Passwo... Revisions
Copy Record
Select Find Add Copy Del... Close Seg... New... Dis... Abo
Links User ... OLE ... Internet
User ID / Role JDE
Data Source
User / Role
JDE
User ID
Data Source
System User
JDE Business Data - AP HP jdeowudb Enable
JDE Business Data - AP NT jdeowudb Enable
JDE Business Data - AP RS jdeowudb Enable
JDE Business Data - AP SN jdeowudb Enable
JDE Business Data - OWSARSYS JDEOWSAR Enable
JDE Business Data - OWSARSYS DNT jdeowsar Enable
JDE Business Data - Prd733u jdeowudb Enable
JDE Control Tables - OWSARSYS JDEOWSAR Enable
JDE DENNF112 - B9 SYS9 SG7049907 Enable
JDE TC Test Sandbox - DB2/400 TCDB2 Enable
JDE TC Test Sandbox - Oracle TCORCL Enable
JDE TC Test Sandbox - SQL TCSQL Enable
Find records
Row:1

5. On P98OWSEC [Work With User Security], complete the following field:
   - *User ID \ Role*

     JDE
6. Click Find.

7. Click Add.


P98OWSEC - [Security Revisions]
File Edit Preferences Form Window Help
Tools
Form
Security History
OK Can... Dis... Abo
Links Securi... OLE ... Internet
User ID
Role
Data Source
System User
Password
User Status
Enabled
Disabled
Allowed Password Attempts
Invalid Password Attempts
Daily Password Change Limit
Password Change Frequency
Password Changed
Security Changed
Force Immediate Password Change
Display all errors currently logged

8. On Security Revisions, complete the following fields:
   - *User ID*
     JDE
   - *Data Source*
     DEFAULT
   - *System User*
     JDE
   - *Password*
     Enter a valid password for your installation.
   - *User Status*
     Ensure the Enabled radio button is selected.
   - *Allowed password attempts*
     Enter a value applicable to your installation.
   - *Password change frequency*
     Enter a value applicable to your installation.
9. Click OK.
10. Click Find to verify that the record was added.

Adding a Security Override for Running Package Build

If you have secured your EnterpriseOne libraries, the user running package build must sign on as a user who has rights to create tables in the Central Objects library. If you have Security Server turned on, set up a security override for the EnterpriseOne user so that when they connect to the data source, they connect as a system user (*IBM i* user profile) who has update rights to the library.

Adding a security override must be done by a security administrator. To add a security override, you must first add a system user for the user profile which has update rights to the library (for example, the library owner), and then add an override for the EnterpriseOne user who will run the package build.

Refer to the *JD Edwards EnterpriseOne Tools Package Management Guide* in the appendix entitled: *Appendix A, Adding a Security Override for Package Build* for further details on setting up security overrides for package build.

Enabling Server-Side Signon Security

Ensure the ***jde.ini*** on the Enterprise Server has these settings to support signon security:

```
[SECURITY]
SecurityServer=server_name
User=JDE
Password=JDE
Default Role=*ALL
DefaultEnvironment=
                          PD920
```

```
DataSource=
                          System - 920

History=0
```

After you modify the *jde.ini* on the Enterprise Server, you must restart the *JD Edwards EnterpriseOne* Services so the settings can take effect.

> **CAUTION:** If you have changed the password for the JDE user, the password you specify on Enterprise Server in **JDE.INI** must be the new password.

Enabling Client-Side Signon Security

Locate the *JD Edwards EnterpriseOne* client *JDE.INI* that is deployed from the Deployment Server. Typically the file can be found at the following location:

```
x:\JDEdwards\
   E920
\OneWorld Client Install\Misc\JDE.INI
```

where x: is the drive on which *JD Edwards EnterpriseOne* is installed.

Ensure that *JD Edwards EnterpriseOne* client *JDE.INI* has these settings:

```
[SECURITY]
SecurityServer=server_name
DataSource=
                          System - 920

DefaultEnvironment=
                          DV920

Default Role=*ALL
Row Security=NO_DEFAULT
```

Setting Up Single Sign-on

You must set up *JD Edwards EnterpriseOne* Single Signon Security using the procedures described in *Setting Up JD Edwards EnterpriseOne Single Sign-On* of the *JD Edwards EnterpriseOne Tools Security Administration Guide*.

> **CAUTION:** Using default settings may expose a potential security risk. Thus, it is highly recommended to overwrite the single sign-on settings using the single sign-on configuration applications discussed in *Setting Up JD Edwards EnterpriseOne Single Sign-On* of the *JD Edwards EnterpriseOne Tools Security Administration Guide*.

Setting Up Microsoft Windows Security on Directories

To set up Microsoft Windows security on the *Release 9.2* directories and files on your Deployment Server. Use these charts to determine what permissions are required for the various types of *Release 9.2* users and perform these tasks to set permissions on the Security tab:

- *Setting Security on the Pathcode Directory*
- *Setting Security on the Database Directory*
- *Setting Security on the Data Dictionary Directory*
- *Setting Security on the Helps Directory*
- *Setting Security on the Media Object Directory*
- *Setting Security on the Planner Directory*
- *Setting Security on the Print Queue Directory*
- *Setting Security on the System Directory*

Note: Not all directories are available. The directory names listed in the table below are subdirectories of the `\JDEdwards\ E920` directory structure. You can apply the indicated permissions to all subdirectories and files except where noted.

Setting Security on the Pathcode Directory

This table lists the settings to set security on the pathcode directory:

User Type	Permissions
JDE (all subdirectories except \pathcode and \package)	Change Change
Production users (all subdirectories except \pathcode and \package)	Read Only Change
Development users (all subdirectories except \pathcode and \package)	Change Change
CNC administrators and application leads (all subdirectories except \pathcode and \package)	Change Change

Setting Security on the Database Directory

This table lists the settings to set security on the database directory:

User Type	Permissions
JDE	Change
Production users	No Access
Development users	No Access
CNC administrators and application leads	No Access

Setting Security on the Data Dictionary Directory

This table lists the settings to set security on the data dictionary directory:

User Type	Permissions
JDE	Change
Production users	No Access
Development users	No Access
CNC administrators and application leads	Change

Setting Security on the Helps Directory

This table lists the settings to set security on the Helps directory:

User Type	Permissions
JDE	Change
Production users	Read Only

User Type	Permissions
Development users	Read Only
CNC administrators and application leads	Read Only

Setting Security on the Media Object Directory

This table lists the settings to set security on the media object (literal name is `mediaobj`) directory:

User Type	Permissions
JDE	Change
Production users	Read Only
Development users	Read Only
CNC administrators and application leads	Change

Setting Security on the Planner Directory

This table lists the settings to set security on the planner directory:

User Type	Permissions
JDE	Change
Production users	No Access
Development users	No Access
CNC administrators and application leads	No Access

Setting Security on the Print Queue Directory

This table lists the settings to set security on the print queue (literal name is `printqueue`) directory:

User Type	Permissions
JDE	Change
Production users	No Access
Development users	No Access
CNC administrators and application leads	No Access

Setting Security on the System Directory

This table lists the settings to set security on the system directory:

User Type	Permissions
JDE	Change
Production users	Read Only
Development users	Read Only
CNC administrators and application leads	Change

Using the Adobe SVG Viewer on Web Clients

Per the Minimum Technical Requirements (MTRs) for *JD Edwards EnterpriseOne* web clients (refer to the section of this guide entitled: *Accessing Certifications*), you must have the Adobe Scalable Vector Graphics (SVG) viewer installed on your web clients in order to use specific *JD Edwards EnterpriseOne* applications, such as Demand Flow Manufacturing.

Within such *JD Edwards EnterpriseOne* applications, the Graphical Product Synchronization uses the Adobe SVG viewer for displaying the graphics associated with the product synchronization. The *JD Edwards EnterpriseOne* application automatically detects the Adobe viewer if it is already installed for the browser. If the viewer is not installed for the

browser, the system displays a link that you can use to install the viewer from the Adobe web site. The URL for this link is:

http:\\www.adobe.com\svg\viewer\install\main.html

Note: SVG is a graphics file format and web development language based on XML that enables dynamic creation of high-quality graphics with precise structural and visual control. It is based on standards defined by the World Wide Web Consortium (*http:\\www.w3.org\TR\SVG*) .

Tip: The installation of the SVG viewer may require administrator authority on your client machine.

Setting Up Solution Explorer

Solution Explorer is the Microsoft Windows-based interface that provides access to *Release 9.2* applications, role-based menus, implementation and configuration options, documentation, and training materials. Solution Explorer is a convenient window into *Release 9.2* .

Users can access Solution Explorer to search and navigate quickly through *Release 9.2* applications. Users also can customize Solution Explorer to create their own tasks and link tasks to other Web-based information.

Setting Up Solution Explorer HTML Documentation Path

When *Release 9.2* is installed, the system automatically stores HTML documentation hierarchically in folders located in a common documentation directory. Using Media Object Queues, Solution Explorer locates these files and displays the associated documentation in its own window whenever a user selects a task.

The file path from Solution Explorer to the HTML documentation files is defined in the F98MOQUE table; it must be configured by accessing the corresponding program, called the Work with Media Object Queues (P98MOQUE) program. When *JD Edwards EnterpriseOne* installs the documentation files, it creates an entry in the Media Object Queue table that associates the Queue Name, called ActivEraData, with a generic path to the documentation. For Solution Explorer to link each HTML file with the correct task, you must open this program and change the server name for the directory path associated with the Queue Name ActivEraData. The directory path has this structure:

\\Server_Name\ *E920* \SolutionExplorder\Data

where *Server_Name* is the name of your Deployment Server.

When the queue name ActivEraData is correctly mapped to the main HTML documentation directory, Solution Explorer locates and displays the associated documentation when a user accesses a Task Location or Task View Location. For example, if a task named JDE001234 exists, the path to the HTML file of the summary document for the task is:

\\Server_Name\ *PY920* \SolutionExplorer\Data\JDE001234\summary.html

where *Server_Name* is the name of the Deployment Server

For more information on setting up the documentation path, refer to *Modifying Media Object Queues*.

Setting Up the Home Page for Solution Explorer

The home page is generally the first screen a user sees when logging on to Solution Explorer. This screen can be used to display information that is relevant to end users in the enterprise. It can be an external Web site, an intranet site, or even HTML files stored on any server on the network.

During the installation process, a directory called PortalLite is created when the Deployment Server is installed. This directory resides in this path:

x:\base_installation_directory\SolutionExplorer\PortalLite

where *x:\base_installation_directory* is the drive and directory where you installed *Release 9.2* on your Deployment Server.

The PortalLite directory includes a set of HTML files that make up the default Home Page. Even though this directory is on the Deployment Server by default, the directory could reside anywhere on the network, such as on a *HTML Web Server* or on a local Development Client.

When the *Release 9.2* client is installed, the system updates the client ***JDE.INI*** to point to the location of the PortaLite directory. For example, if the name of the Deployment Server is DepServer1 and the share name is *E920* , the [Explorer] section of the ***JDE.INI*** is updated as follows:

```
[Explorer]
ExplorerHomeURL="\\DepServer1\
                          E920
                        \SolutionExplorer\portallite\index.html"
ExplorerStart=INTERNET
```

You can change the above parameters in the ***JDE.INI*** to display any HTML file or URL as the default Home Page. This table describes these parameters:

[Explorer] Parameter	Description
ExplorerHomeURL=	Defines the URL or filename of the Home Page that is displayed when the user logs on. The default value is: **\\Depserver1\ *E920* \SolutionExplorer\portalite\index.html**
ExplorerStart=	Defines the Explorer start mode. Values are: • INTERNET This is the default value. When you start Solution Explorer, the system displays the Internet view first. • TASK When you start Solution Explorer, the system displays the last task view the user viewed. To display a specific task view, use this syntax: **ExplorerStart=TASK:xx** where *xx* is the task ID of the task view.

Configuring for Use with Vertex Quantum Tax Applications

This topic describes how to configure *JD Edwards EnterpriseOne* to use the Vertex Quantum tax applications. If you do not use these applications with *JD Edwards EnterpriseOne* , skip this section.

Release 9.2 can be used with the following Vertex Quantum tax applications:

- Vertex Quantum for Payroll Tax
- Vertex Quantum for Sales and Use Tax

The Vertex Quantum applications should be installed on your system before starting the configuration tasks.

> **Note:** The Vertex Quantum applications can be used with the Indexed Sequential Access Method (ISAM) database or Oracle database (for either of the Vertex Quantum applications) or the SQL Server database (for Vertex Quantum for Sales and Use Tax). The ISAM database is installed as part of the Vertex Quantum application installation.

See Also

Vertex Quantum for Payroll Tax - Administrator's Guide

Vertex Quantum for Sales and Use Tax - Administrator's Guide

Before configuring *Release 9.2* for use with Vertex Quantum applications, install Vertex Quantum for Payroll Tax, Vertex Quantum for Sales and Use Tax, or both on the Enterprise Server. For information about installing the Vertex Quantum applications, refer to the Vertex Quantum administration guides listed above. When installing the Vertex Quantum applications, note the following:

- Note the directory path on the Enterprise Server for the directory in which the Vertex Quantum applications are stored.
  This information is needed when copying the Vertex libraries into the *Release 9.2* directory structure.
- For Vertex Quantum for Sales and Use Tax, you can install the ISAM database version of the Vertex Quantum application, or you can use the SQL Server or Oracle database.
- For Vertex Quantum for Payroll Tax, you can install the ISAM database version of the Vertex Quantum application, or you can use the Oracle database.
  You cannot use SQL Server with Vertex Quantum for Payroll Tax.
- When using the Vertex ISAM database, note the directory path on the Enterprise Server for the directory or directories in which the Vertex Quantum application databases are created.
  This information is needed for establishing *Release 9.2* database connectivity.

Adding Vertex Quantum Directory Information to the Microsoft Windows Server Path

To add the Vertex Quantum application directory information to the Microsoft Windows server path:

1. From the Microsoft Windows Enterprise Server, access the Control Panel.

2. On Control Panel, click the System icon.
3. In System, select the Advanced tab.
4. On the Advanced tab, click the Environment Variables button.
5. In the System Variables window, scroll down until the keyword Path appears in the Variable column.
6. Click Edit to display the current path in the Variable Value field.
7. Search the current path (as shown in the Value field) for the Vertex Quantum application directory.

   If the directory does not appear, you must add it to the path, as described in the following step. If the directory appears in the path, skip to step 9 in this task.

8. Place the cursor in the Value field, and use the right arrow to scroll to the end of the field and enter this path: `x:\vertexDirectoryPath\vertex\utils`

   where *x:\vertexDirectoryPath* is the drive and path for the directory in which the Vertex Quantum applications are stored.

   Note: You might need to include a semicolon to separate this entry from previous entries.

9. Click Set.

   The new value is saved.
10. After you finish setting the Environment Variables, repeat this task for User Variables, starting from Step 5 in this task.
11. Click OK and reboot the server.

    The new path takes effect.

Configuring the Database Connections for Vertex Quantum Tax Applications

To configure *Release 9.2* database connections to use the Vertex Quantum applications:

1. In the Fast Path field, enter G731 to access Vertex Quantum Tax Processing.

   The Vertex Quantum Tax Processing panel appears.
2. Highlight and right-click the Database Connections (P7308) program.

   A context menu appears.
3. On the context menu, select Prompt for Values.

The Processing Options dialog appears.

4. On Processing Options, click the Quantum tab and enter the following information:

Option #1: Enter which Vertex Quantum applications are installed:

Value	Action
[blank]	Install both Vertex Quantum tax applications.
1	Install the Vertex Quantum for Sales and Use Tax application.
2	Install the Vertex Quantum for Payroll Tax application.

Option #2: Enter location information for the databases:

Value	Action
[blank]	Define databases for both Vertex Quantum tax applications in the same location.
1	Define databases for the Vertex Quantum for Payroll Tax and Vertex Quantum for Sales and Use Tax applications in separate locations.
2	Define databases for the Vertex Quantum for Payroll Tax and Vertex Quantum for Sales and Use Tax applications in separate locations, and the four databases for the Vertex Quantum for Sales and Use Tax application in separate locations.

Option #3: If processing option #2 is set to 1 or 2 (that is, if the Vertex databases are in separate locations), specify the GeoCode database location information:

Value	Action
[blank]	Define the Vertex Quantum Payroll Tax and Sales and Use Tax applications to use the same GeoCode database.
1	Define each of the Vertex applications to use a separate copy of the GeoCode database, and that the two copies are expected in separate locations.

5. Click OK.

   The Vertex Quantum Database Connection panel is displayed. The Database Connection panel contains one or more tabs that correspond to the database connections that must be defined. The displayed tabs are determined by the values you entered in the processing options, in Step *4* of this task.

   > **Note:** The GeoCode database is the only Vertex Quantum database that can be shared between the Vertex Quantum Payroll Tax and Sales and Use Tax applications. However, all of the Vertex Quantum databases can be installed in the same location or in different locations.

   One or more of the following tabs appears on the Database Connection panel:

Tab	Description
All	All Vertex Quantum application databases for both applications are located on the same server and in the same location.
GeoCode	The same GeoCode database is used by both applications.
GeoCode-Sales and Use	The GeoCode database used by the Sales and Use Tax application is located on this server and location. A separate copy of the GeoCode database, at another location, is used by the Payroll Tax application.
GeoCode-Payroll	The GeoCode database used by the Payroll Tax application is located on this server and location. A separate copy of the GeoCode database, at another location, is used by the Sales and Use Tax application.
Sales and Use	The four databases used by the Sales and Use Tax application are located together, on this server and location.
TDM	The Test Data Management (TDM) database, used by the Sales and Use Tax application, is located on this server and location.
Register	The Register database, used by the Sales and Use Tax application, is located on this server and location.
Rate	The Rate database, used by the Sales and Use Tax application, is located on this server and location.
Payroll	The databases used by the Payroll Tax application are located on this server and location.

6. On the Database Connection panel, select each tab and enter the following information:
   - *Data Source*

Enter the name of the library where the Vertex Quantum tables are located. The location you enter should be the location on the server used for the database when the Vertex applications were installed as previously described in this step.

- *Server*

  Enter the name of the *IBM i* machine where the Vertex Quantum tables are located.
- *User ID*

  Enter a user ID that can access the database.
- *Password*

  Enter the password for the user ID specified above.

> **Note:** The P7308 program encrypts the user ID and password and also visibly masks the password field. For additional details, refer to "Encrypting Sensitive Data in EnterpriseOne" in the *JD Edwards EnterpriseOne Tools Security Administration Guide* .

7. Click OK.

   The changes do not take effect until you have logged off of your system and logged back on.
8. On the Form menu, use *IBM i* Library to specify the Vertex Quantum library that contains the Vertex Quantum APIs.

   For Vertex Quantum for Sales and Use Tax, this library is typically called VERQSU. For Vertex Quantum for Payroll Tax, this library is typically called VERQPRT.

Mapping Objects to the Enterprise Server

Objects that call the Vertex Quantum APIs must execute on the server on which the Vertex Quantum APIs reside. Check that the following *Release 9.2* objects are configured in the system OCM to execute on the server. Do not change the mappings.

For Vertex Quantum for Payroll Tax:

- R07200 (Pre-payroll Driver)
- B0700058

For Vertex Quantum for Sales and Use Tax:

- X00TAX.c (Tax Calculator)
- B7300002 (Validate Quantum GeoCodes)
- B7300004 (Retrieve Quantum GeoCodes)
- B7300012 (Validate Quantum Software Information)
- B0000182
- B0000183

Testing the Vertex Quantum Connection from

Use the following procedures to test the Vertex Quantum connection from *Release 9.2* .

To test the Vertex Quantum for Payroll Tax interface:

1. Access the Payroll Workbench menu (G07BUSP11), and select Pay Cycle Workbench.
   The Work with Payroll Cycle Workbench panel appears.
2. Specify pre-payroll information and submit the pre-payroll.
   For information about the Payroll Workbench and submitting pre-payroll, see Processing Pre-Payroll in the *Release 9.2 Payroll Implementation Guide.*
3. If no taxes are being calculated, there may be a setup or configuration problem.
   Verify the following to make sure setup is correct:
   - UBE R07200 is being executed on the server where the Vertex Quantum for Payroll Tax APIs reside.
   - Correct values are assigned to the **Data Source**, **Server**, **User ID**, and **Password** fields on the Database Connection panel, as specified in *Configuring the Database Connections for Vertex Quantum Tax Applications*.
4. For the Vertex Quantum for Sales and Use Tax interface:
   In the Fast Path field, enter P73GEO.
   The Retrieve GeoCode panel appears.
5. On the Retrieve GeoCode panel, enter *CO* in the State field and *DENVER* in the City field, and click Find.
   The code 060310140 should appear in the grid.
6. If nothing appears in the grid, a setup or configuration problem might exist.
   Verify the following to make sure setup is correct:
   - These values are set in the Work with Quantum Constants Revision table, accessed by the Constants application (P7306) on menu G731:

     ```
     Quantum Active: Y

     Canada Country Code: CA
     ```

     > **Note:** Changes to the Work with Quantum Constants Revision table do not take effect until you have logged off of your system and logged back on.

   - Required *Release 9.2* objects are mapped to the server where the Vertex Quantum for Sales and Use Tax APIs reside.
     Also ensure that correct values are assigned to the **Data Source**, **Server**, **User ID**, and **Password** fields on the Database Connection panel. Instructions for both procedures are specified in the section of this chapter entitled *Mapping Objects to the Enterprise Server*

Adding an Entry for a Remote Database Directory for Vertex

To add an entry for a remote database directory:

1. Log on to the *IBM i* as QSECOFR.

2. On the command line, enter:

   ```
   WRKRDBDIRE
   ```

3. Look for an entry on your *IBM i* for Remote Location *LOCAL. This entry must have the same name as your machine.
4. If you do not have an entry like this, enter *1* in the Option column and enter the machine name in the Relational Database column, and press enter.

   In the Remote Location Name or Address enter *LOCAL and press Enter. If you already have a *LOCAL entry and the Relational database name is NOT the same as your machine name, you must remove the entry that you have and add a new entry as above.

Enabling CRM Functionality

To enable CRM functionality after the upgrade is complete, you must perform these procedures on the CRM Enterprise Server and the CRM client:

- *Enabling CRM on the CRM Mobile Client*
- *Enabling CRM on the Enterprise Server*

Enabling CRM on the CRM Mobile Client

To enable CRM functionality in *JD Edwards EnterpriseOne* and the *JD Edwards EnterpriseOne* mobile client, make sure that the F99410 table has records that contain the following system codes:

- SY90CA
- CRMMSL
- SY49

On your Enterprise Server, access the P99410 application and complete this procedure to enable CRM functionality:

1. On Work with EnterpriseOne System Control, click Add.
2. On EnterpriseOne System Control Revisions, enter each of these system codes, one at a time, in the Data Item field:
   - 90CA

     This code enables CRM functionality in *JD Edwards EnterpriseOne* .
   - MMSL

     With SY49, this system code enables CRM functionality in the mobile client.
   - SY49

     With CRMMSL, this system code enables CRM functionality in the mobile client.
3. Click Yes.
4. Click OK.
5. Repeat these steps to add each system code.

Enabling CRM on the Enterprise Server

Using an ASCII editor, you must modify the ***JDE.INI*** ***jde.ini*** on your Enterprise Server to add this section and setting:

```
[MAILMERGE]
FileLocation=location
```

where **location** is a temporary location that you specify for the CRM-related mail merge files that are generated on your Enterprise Server, for example:

\TEMP

Enabling Verity Enhanced Search Capability

If you are using the enhanced search capability with *JD Edwards EnterpriseOne* , you must download and install the Verity Software from the Oracle Software Cloud Web site at this link:

http:\\edelivery.oracle.com

Understanding Media Object Queues

This section discusses these topics:

- Overview
- Modifying Media Object Queues
- Specifying the Help Location Used by the Webv Client and Development Client

Overview

Media objects enable the attachment of information to *Release 9.2* applications. Media Object Queues enable you to specify the storage location of media objects to be tracked by reference as opposed to physical network location. This enables easier administration of media locations.

Media object queues provide the system administrator the ability to easily manage the storage of media objects and helps in a *Release 9.2* configuration. Within *Release 9.2* , set up media object queues in order to use images that are outside the domain of the imaging product (for example, scanned images).

Define a media object queue to identify the pointer to the location where the actual image files or Object Linking and Embedding (OLE) objects reside. For OLE objects, the name of the queue must be OLEQUE. The media object queues must reside on a Microsoft Windows-based machine. A valid network-qualified path must exist for this machine. Use the Deployment Server or any other Microsoft Windows-based machine.

If you modify the OLEQUE path, make sure to copy the image files and OLE objects to the new location.

When using the Deployment Server to store media object queues, remember to make the machine available for use daily by *Release 9.2* applications.

Media object queue paths are shipped with generic server names. To enable media object queues at the customer site, enter the Deployment Server name in the media object queue path.

See Also

Media Objects and Imaging in the *JD Edwards EnterpriseOne Tools Runtime Administration Guide* for more information about the use of media objects.

Modifying Media Object Queues

To modify your media object queues:

1. Log into *Release 9.2* as JDE in the *DEP920* environment.
2. From System Administration Tools (GH9011), select Media Object Queues (P98MOQUE).
3. To define the location for a new OLE queue, click Add.
4. Complete these fields:
   - *Name*

     Enter a valid value for your queue.
   - *Path*

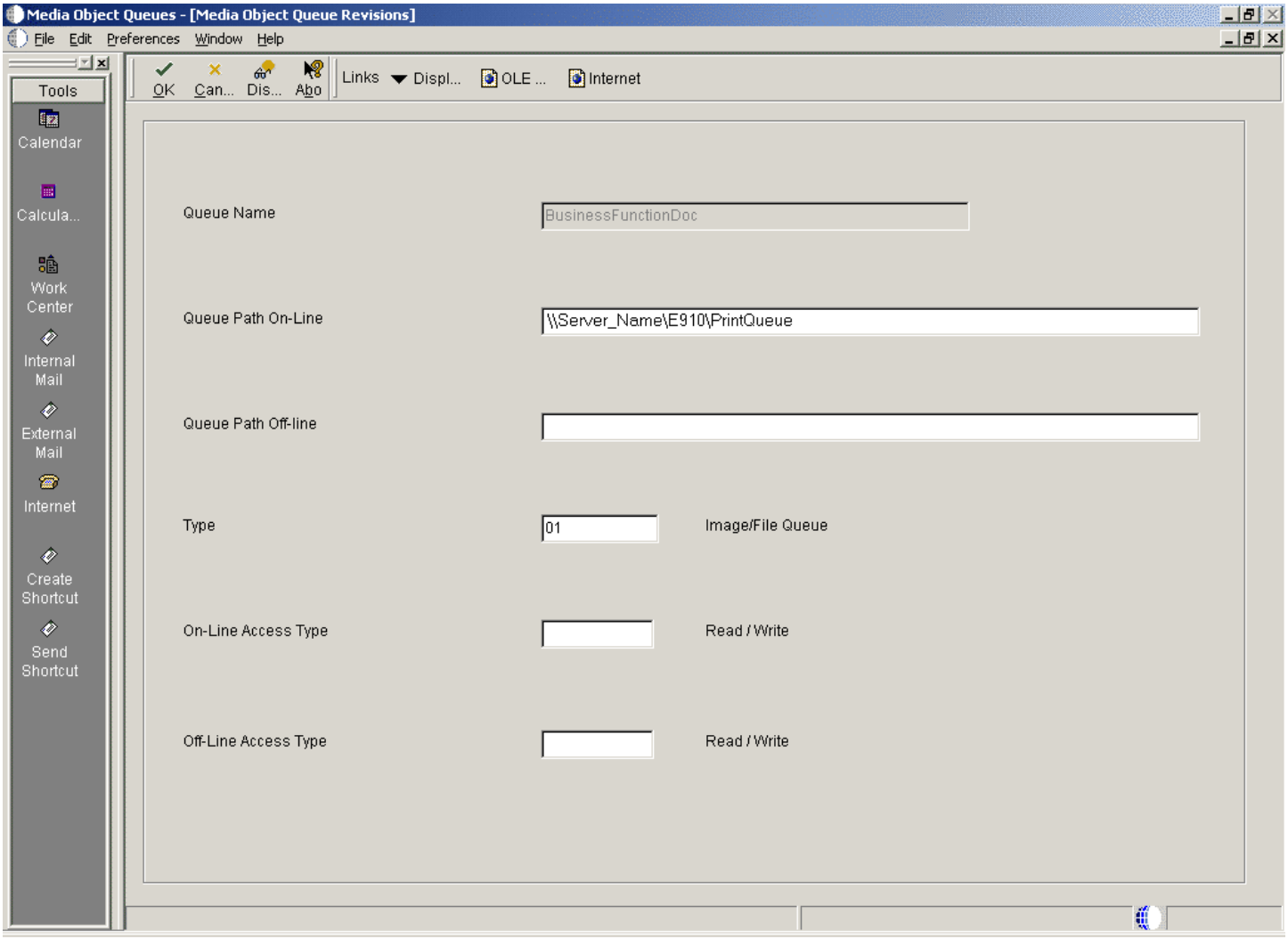
     Generally the queue paths include *server_name* and *queue_name*. Replace *server_name* with the name of the Deployment Server or the location of the media object queue. A valid queue path for a network location might be:

     \\server_name\ *E920* \queue_name

     where **server_name** is your Deployment Server and **queue_name** is the name of the media object queue.

     When using ComposerCBT, the media object queue path does not require \\ or **server_name**. ComposerCBT is shipped with an **x** for the drive name. To enable the Composer CBT queue, replace the **x** with the drive letter that the Development Client uses to access the server where the media object queues reside. For example: **N:\Mediaobj\ComposerCBT**.
5. To change an existing media object queue, click Find to display a list of queue names and their paths.

6. On Work With Media Object Queues, select the queue name you want to modify.


Media Object Queues - [Media Object Queue Revisions]
File Edit Preferences Window Help
Tools
Calendar
Calcula...
Work Center
Internal Mail
External Mail
Internet
Create Shortcut
Send Shortcut
OK
Can...
Dis...
Abo
Links
Displ...
OLE ...
Internet
Queue Name
BusinessFunctionDoc
Queue Path On-Line
\\Server_Name\E910\PrintQueue
Queue Path Off-line
Type
01
Image/File Queue
On-Line Access Type
Read / Write
Off-Line Access Type
Read / Write

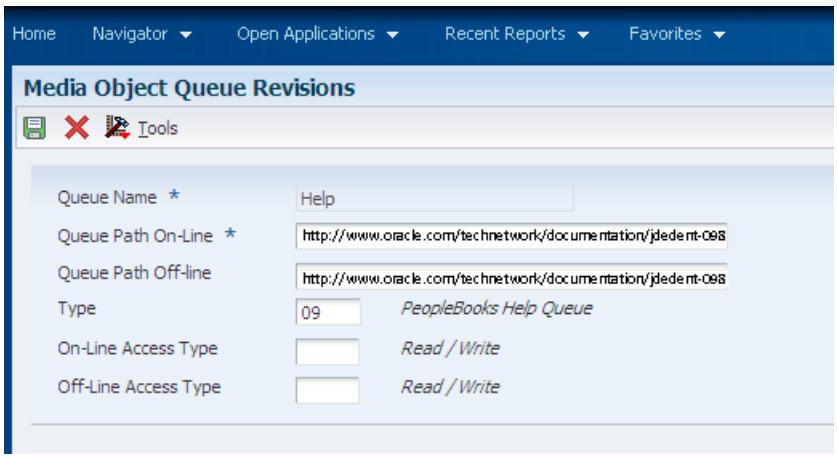
7. On Media Object Queues, change the information in the Queue Path On-Line field to reflect the new location.
8. Copy the image files and OLE objects to the new location.
9. Exit *Release 9.2* and log back on to enable the changes.

Specifying the Help Location Used by the Web Client and Development Client

> **Note:** The instructions in this section describe the setup of basic help function. For directions on setting up contextual help, refer to the *JD Edwards EnterpriseOne Tools Runtime Administration Guide* in the section entitled: *Setting Up Help* .

To specify the help location used by the Web Client and Development Client:

1. From System Administration Tools (GH9011), select Media Object Queues (P98MOQUE).
2. To define the location for the Help file that is used by the Web Client, on Media Object Queues, enter **Help** in the Name field and click Find.



3. On Media Object Queue Revisions, complete these fields:
   - *Queue Path On-Line*

     Enter this value

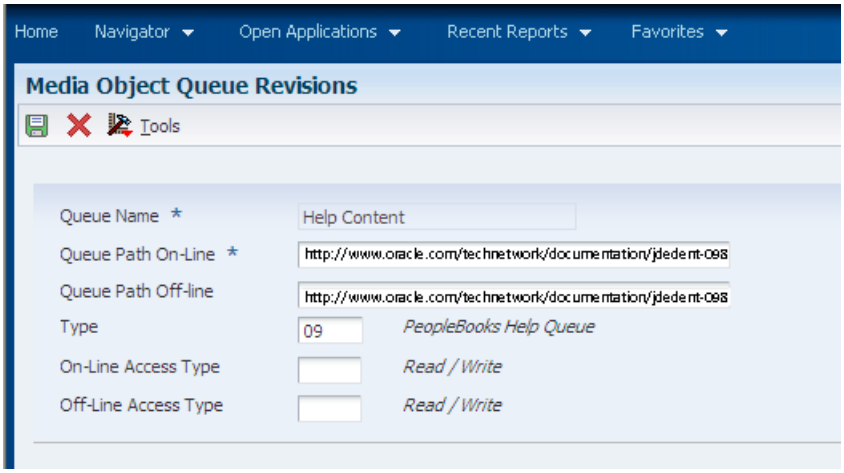
     `http://www.oracle.com/technetwork/documentation/jdedent-098169.html`
   - *Queue Path Off-line*

     Enter the same value as the preceding field, which is:

     `http://www.oracle.com/technetwork/documentation/jdedent-098169.html`
   - *Type*

     Enter the value *09*. The Type field description changes to **PeopleBooks Help Queue**.
4. Click OK to return to the Work With Media Objects form.

5. To define the location for the Help Content Queue that is used by the Development Client, on Media Object Queues, enter **Help Content** in the Name field and click Find.



6. On Media Object Queue Revisions, complete these fields:

   - *Queue Path On-Line*

     Enter this value

     `http://www.oracle.com/technetwork/documentation/jdedent-098169.html`

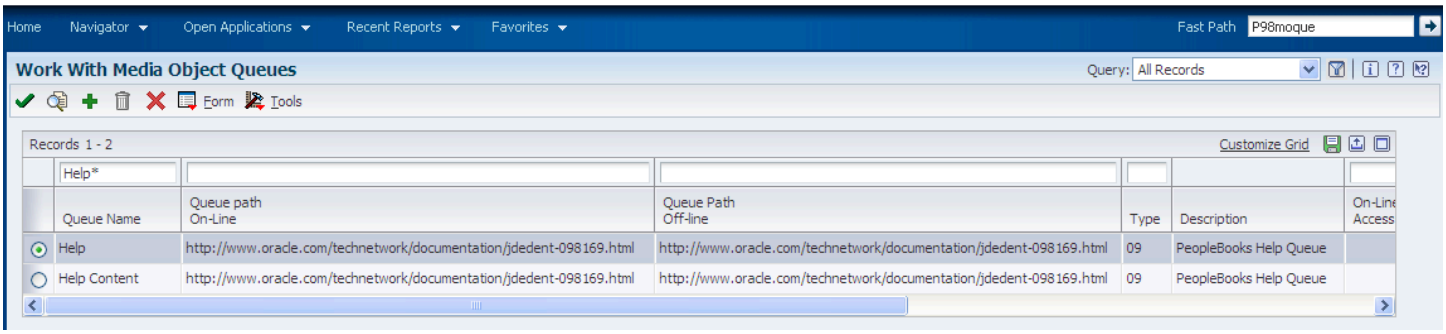
   - *Queue Path Off-line*

     Enter the same value as the preceding field, which is:

     `http://www.oracle.com/technetwork/documentation/jdedent-098169.html`

   - *Type*

     Enter the value *09*. The Type field description changes to **PeopleBooks Help Queue**.



7. On Work With Media Object Queues, enter Help* in the QBE for Queue Name and verify the two help queues are added.
8. Exit *Release 9.2* and log back on to enable the changes.

Working with the Data Dictionary

This chapter describes a scenario where you might be modifying your data dictionary on a machine other than your *IBM i* -based Enterprise Server or if you are modifying your Data Dictionary and not planning on building a package to reflect those changes. In such cases you need to use this mechanism to move the chances to your Enterprise Server.

Additionally, you might find this procedure useful for performance reasons if you do not want your Enterprise Server to JITI data dictionary specifications in real time.

This process is also useful to move generated serialized objects (required for web-enabled applications) from the Microsoft Windows web development Development Client on which they were generated to the Enterprise Server.

Recreating Replicated Data Dictionary Files

To recreate replicated data dictionary files:

1. From the Data Dictionary Design menu (GH951), select Recreate Replicated Data Dictionary (R92TAM).
2. On Work with Batch Versions, select version **XJDE0001**.
3. On Version Prompting, from the Row menu, select Processing Options and enter the following information:

   - Language Preference

   Use the visual assist button to select the correct value for your language.

   - All Languages

   Enter the value *1*.
4. Click OK.
5. Select version **XJDE0001**.
6. On Version Prompting, select Advanced from the Form menu.
7. On Advanced Version Prompting, activate the Override Location option.
8. Click OK.
9. On Version Prompting, click Submit.
10. After the job is completed, log off *Release 9.2* .

Working with SETOWAUT

SETOWAUT is a set of tools you can use to secure *JD Edwards EnterpriseOne* objects on your *IBM i* Enterprise Server. The SETOWAUT objects are delivered in a SAVF by the same name in the JDEOW library. However, it is recommended that you download the latest version of SETOWAUT from the Update Center.

This file can be restored using the RSTLIB command. It should be restored to a library called SETOWAUT. Instructions for using SETOWAUT are found in the *JD Edwards EnterpriseOne Tools Server and Workstation Administration Guide* .

UBE Performance ' SQL Package Location

Once the Table Conversions are completed, change the jde.ini setting on the Enterprise Server that controls where SQL Packages are created. The applicable setting is:

```
[DB SYSTEM SETTINGS]
sqlPackageLibrary=value
```

where **value** controls the location where *JD Edwards EnterpriseOne* will place SQL packages on your *IBM i* -based Enterprise Server.

This is shipped with a value of *2* in order for Table Conversions to work correctly. You must change this value to **0** or **1** otherwise you will see a negative performance impact on UBEs. Values are listed in this table:

Value	Action

0	Indicates the system to create packages in the library defined in this jde.ini section:
	
	`[INSTALL]`
	`DefaultSystem=e1_system`
	
	where for *JD Edwards EnterpriseOne Release 9.2* the default value for **e1_system** is *E920* SYS.

1	Indicates the system will create packages in QRECOVERY and that UBE packages will be named Rnnnnn. **Caution:** You will need to delete any old UBE SQL packages in QRECOVERY. Please note that no UBEs can be running on the server while you are deleting these packages.
2	Indicates the system will create packages in QRECOVERY and that UBEs are assigned unique names (job number). For example, a UBE name will be in the format T123456. **Note:** You can use this setting for normal daily operations. However it will make the startup for your frequently run UBEs a little slower as they will not be able to use existing SQL packages.

11 Manual Table Conversions

Manual Table Conversions

This section contains the manual table conversions that are required to finish the upgrade process if you are upgrading from previous releases.

> **Note:** Whenever you submit a Manual Table Conversion from Batch Versions, check on the Properties box to ensure you specify the correct Source and Target environments. You must also override the location to Local as the Previous Release environment is not defined on the Enterprise Server.

Running Post Installation Tasks

You must run post installation Universal Batch Engine (UBE) reports to successfully use your previous data. Unless noted otherwise, you should run these conversions from a Development Client in the environment that you are upgrading. When running against SQL Server, Oracle, or *DB2 for Linux, Windows, and UNIX* , sign on as the data source owner if any of the post installation jobs are TCs which create temp tables.

Run these post installation UBEs after the automatic table conversion programs have completed successfully.

You must use the Fast Path field to navigate to the Post Install Menu (GH9619) where you run the UBEs listed in this table.

> **Note:** If you do not use the Fast Path field to navigate to the Post Install Menu (GH9619), the menu selections may not display properly. All Conversion Programs marked with * must be run on the Deployment Server.

These post installation tasks are described in the following sections:

- *Upgrading from XE \ ERP 8.0*
- *Upgrading from 8.9 or Below*
- *Upgrading from 8.10 or Below*
- *Upgrading from 8.11 or Below*
- *Upgrading from 8.11 SP1 or Below*
- *Upgrading from 8.12 or Below*
- *Upgrading from 9.0 or Below*
- *Upgrading from 9.1 or Below*
- *Processing Options for R31P40039*

Upgrading from XE \ ERP 8.0

This section contains a list of all the Table Conversions required when upgrading from XE \ ERP 8.0.

Upgrading from XE \ ERP 8.0				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R890030B	Only if you have taken the ESU in XE/ERP8.0 and are using F0031 Bank Transit Master Tag Table.	None	To merge the F0031 Bank Transit Master Tag Table into the F0030 Bank Transit Master. The conversion will copy the data from the bank address number AN8BK in F0031 to the bank address number AN8BK in F0031.	None
R8903B11P1	To convert F03B11 from XE\ERP 8.0.	This is to be run after the A\R ledger has been successfully upgraded in the automatic Upgrade Plan. The basic F03B11 table conversion must have successfully run in your plan prior to running this Post Install job. Suspend all Invoicing and Sales Update activity from the time of the upgrade through the successful completion of this job.	Critical A\R features in invoicing will malfunction if this job is not run.	Over a dozen new fields were introduced to the F03B11 table. The standard table conversion, which is run through the Table Conversion Scheduler application (P98430), initializes all of the new fields to default or blank values. Limitations in the table conversion tool prevent it from calculating values for some of the new fields in the F03B11 table. This post-install conversion supplements R8903B11.
R890411P1	To convert F0411from XE \ERP 8.0.	This is to be run after the A\P Ledger has been successfully upgraded in the automatic Upgrade Plan. Suspend all Vouchering and Voucher Match activity from the time of the upgrade through successful completion of this job.	Critical A\P features in invoicing will malfunction if this job is not run.	New fields have been added to F0411. This updates the domestic amount to distribute (ATAD), foreign amount to distribute (CTAD), domestic non recoverable tax amount (NRTA), foreign non recoverable tax amount (FNRT) and base company currency code (BCRC). The Purchase Order number (RPPO) is left padded with zeros.
R89069116	To convert F069116 from XE	None.	This table conversion populates the new field PHISH.	The following fields were added to F069116: LVPT and PHISH. After this program is run, PHISH will contain "1 ". LVPT will remain blank.
R8908601C	To convert F08601 from XE\ERP 8.0.	The processing option of this job should be set based on whether only *JD Edwards World* was used to enter Health and Safety information from the	This table conversion checks for and handles the following scenarios: 1. Processing option is set to 1 (indicates that	Country (CTR) and Incident Occurred on Employer's Premises (ONPRM) columns were added to F08601.

Upgrading from XE \ ERP 8.0				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
		source environment. A processing option value of 1 indicates that *JD Edwards World* was used, while a processing option value of 0 or Blank indicates that *JD Edwards World* was not used exclusively for information entry and *JD Edwards EnterpriseOne* applications may have been used to enter Health and Safety information.	yes, only *JD Edwards World* was used to enter Health and Safety information). 2. Processing option is set to 0 or Blank (indicates that no, *JD Edwards World* was not used exclusively to enter Health and Safety Information).	
R890015B	To convert F0015 from XE\ERP 8.0 for Triangulation Exchange Rates.	This program must run after R891015A - F0015\F00151 Exchange Rate table conversion has completed successfully and the F0015 Currency Exchange Rate table has been upgraded successfully in the automatic Upgrade Plan. Suspend any processes requiring exchange rates from the time of the upgrade through the successful completion of the job. The following objects are required: F0015 R891015B R891015B\XJDE0001	Triangulation exchange rates have values of zero if this job is not run.	After running the R891015A - F0015\F00151 Exchange Rate table conversion the triangulation records have rates that are blank or zero. This selects records from the converted F0015 table where the calculation method is triangulation (CLMETH=3). The rates for the triangulation records are retrieved from the corresponding rates in the F0015 table for both multiplier (CRR) and divisor (CRRD) rates and updated to the triangulation records.
R891216	To convert F1216 when upgrading from XE\ERP 8.0 and requires special attention for whether or not SAR 5685791 has been applied to *JD Edwards EnterpriseOne* Xe. If this SAR has been applied to Xe before upgrading, then there is no need for F1216 data conversion because the data has already been	None	This conversion program corrects existing data in the F1216 table that has been entered using *JD Edwards EnterpriseOne* Xe. The conversion program only modifies data that is stored incorrectly in the table. The conversion program reformats	When upgrading from Xe/ ERP 8.0, the F1216 table may need a data conversion to correct the data that has previously been entered from *JD Edwards EnterpriseOne* . Please, also refer to the Breaking News message that has been published with regard to these issues and the data conversion for *JD Edwards EnterpriseOne* Xe.

Upgrading from XE \ ERP 8.0				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
	corrected when the SAR was applied. Otherwise, the F1216 data needs to be corrected to fix the data that has been entered from *JD Edwards EnterpriseOne* before. Migrating from *JD Edwards World* does not require the F1216 data conversion because the data entered from *JD Edwards World* is in the correct format.		data in the F1216 table and corrects the mapping.	
R894801P	To convert F4801 \ F4801T \ F4817 from XE \ERP 8.0 when working with configured items, serialized components, or generating orders through Customer Service and Warranty or Equipment and Maintenance.	Two processing options exist for this report: Convert URCD Convert PARS If the client does not use serialized components or work with configured items, these processing options should be set as blank.	This report must run to consolidate the F4817 table records into the F4801T tables, set the SRCN field, and reset the configured work order's parent number to the immediate higher related work order in the configured item's construction.	This report consolidates the F4801T and F4817 tables, properly sets the new serialized component field in F4801T, and reassigns the parent work order numbers for the configured item work orders.
R8948164A	To convert F48164 Media Objects from XE\ERP 8.0 for old Knowledge Base.	Requires that table conversions for F00165 and F48164 completed successfully.	To properly convert old Knowledge Base media objects. If this is not run, that information is not available for use by the new Failure Analysis applications.	The media object structure for Failure Analysis has changed. Previously, the media objects were stored in one structure. Now, the media object structure is split into three separate structures.
R8930006D	To convert F30006 Work Center Master from XE \ERP 8.0.	R8930006C must have completed successfully	Blank values in the work center branch plant field are no longer supported because application P3003 and P3112 validate the work center and the branch plant being used.	The primary key of the F30006 table was changed from Work Center (MCU) to Branch/Plant (MMCU) and Work Center in order to support the concept of the work center branch plant. R8930006C is responsible for placing each work center into the respective branch plants based on records found in the F3003 table. However, in the event that the work center is not used in F3003, the branch plant remains blank in the

Upgrading from XE \ ERP 8.0				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
				F30006 table. R8930006D assigns these work centers with a default branch plant value, and selects all records with a Branch/Plant of blank and sets the field equal to the default Branch/Plant in the processing option.
R3365	To regenerate the Resource Profile in Capacity Planning.	Run the batch application R3365 to populate F3303 Capacity Resource Profile. Make sure F4101, F4102, F3002, F3003, F30006, F3007 and F0007 tables have converted for existing data. Data for F3460 is already available since the table has not been changed.	Populates the F3303 Capacity Resource Profile table.	A new field was introduced to the F3303 table. A table conversion was not created for this table due to the complexities of the logic in conversion and the existing solution of running this batch application to create the Resource Profile.
R3380	To convert F3311 \ F3312 \ F3313 from XE \ERP 8.0 for Resource Requirement Planning.	Run the batch application R3380 to populate F3311, F3312, F3313. Make sure F4101, F4102, F3002, F3003, F30006, F3007, F0007, F3411 and F33133 tables have converted for existing data. Data for F3460 is already available since the table has not been changed.	Populates the F3311, F3312, and F3313 tables.	A new field was introduced to the F3311, F3312, and F3313 tables. Table conversions were not created for these tables because of the complexities of the logic in conversion and the existing solution of running batch applications to create Capacity Message, Capacity Peggins and Capacity Load. The R3380 or R3382 programs are the existing batch applications. User has to select either Resource Requirements Planning (R3380) or Rough Cut Capacity Planning \Capacity Requirements Planning (R3382) depending on whether they are using Resource Requirements Planning (RRP) or Rough Cut Capacity Planning\Capacity Requirements Planning (RCCP \CRP).
R3382	To convert F3311 \ F3312 \ F3313 from XE\ERP 8.0 for Rough Cut Capacity Planning\Capacity Requirements Planning.	Run the batch application R3382 to populate F3311, F3312, F3313. Make sure F4101, F4102, F3002, F3003, F30006, F3007, F0007, F3411 and F33133 tables have converted for existing data. Data	Populates the F3311, F3312, and 3313 tables.	A new field was introduced to the F331, F3312, and F3313 tables. Table conversions were not created for these tables because of the complexities of the logic in conversion and the existing solution of running batch applications to create Capacity Message,

Upgrading from XE \ ERP 8.0				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
		for F3460 is already available since the table has not been changed.		Capacity Peggins and Capacity Load. R3380 or R3382 is the existing batch application. User has to select either Resource Requirements Planning (R3380) or Rough Cut Capacity Planning \Capacity Requirements Planning (R3382) depending on whether they are using Resource Requirements Planning (RRP) or Rough Cut Capacity Planning\Capacity Requirements Planning (RCCP \CRP).
R31P40039	To convert F40039 when upgrading from XE\ERP 8.0. If you have chosen a new document type for some work orders, which is different from the document type you used in the past for those work orders, you must run R48803 in order to correct that document type in your tables. See the Setup instructions in the Enterprise Asset Management, Shop Floor and the Engineering Project Management Guides for more details. **Note:** See the table below for information regarding the values to enter for the processing options.	This is to be run immediately after upgrading to validate all programs using F4801\F4801T Order Type prior to database output. Make sure all order types in the 00\DT have been set up in the Document Type Revisions (P40040) before running R31P40039 to convert work orders.	If different types of work orders have been mixed in a single Order Type value, they must convert the F4801 work orders to separate the records by order type. If this job is not run, none of the programs that enter data into F4801\F4801T (for example, Manufacturing Work Order Entry, Equipment Order Entry, Service Order Entry, etc.) are able to function.	It is necessary that all Work Order Types be unique, which is set up in the Document Type Master. For example, an order type of "WO" needs to be set equal to "02" (Manufacturing Work Order). This is set up manually using Document Type Revisions (P40040), or by running F40039 Conversion from Xe (R31P40039). If there are a large number of order types to set up, the UBE may be more efficient. This should be set up once, prior to the following steps.
R8903B571A	To set next unique key id for F03B571 when upgrading from XE\ERP 8.0.	The table upgrade plan should be successfully completed. Suspend all Automatic Debit processing until this UBE completes successfully.	This job must be run for Autodebit processing to function correctly.	This report adds\updates an entry in the F00022 table for the F03B571 table and sets the next unique key ID equal to the next auto debit batch control number.
R8900165K	To change GT0411S Key to use KCO when upgrading from XE\ERP 8.0 and have not yet taken SAR 5848035. Also	This is to be run after the F00165 table has been successfully upgraded in the automatic Upgrade	After running this job existing Media Objects Attachments for Vouchers are accessible from	This conversion program takes records from the F00165 with object name (OBNM) equal to GT0411S and ensures that the Generic Text Key (TXKY)

Upgrading from XE \ ERP 8.0				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
	this UBE is only required for users using Media Object Attachments for vouchers.	Plan. Objects required: Change GT0411S Key to use KCO not CO	the Voucher Entry Program (P0411) and Speed Status Change (P0411S).	is written in the format KCO|DCT|DOC|SFX. Where records are written with TXKY format equal to CO|DCT|DOC|SFX it replaces the generic text key field with KCO instead of CO and preserves the rest of the key.
R8900165JA	To convert F00165 JEDTLGT to GT0911A when upgrading from XE \ERP 8.0.	This is to be run after the F00165 table has been successfully upgraded in the automatic Upgrade Plan. Requires objects: F00165 Convert JEDTLGT to GT0911A	After running this job, existing Media Objects attachments for voucher G\L distributions are accessible from the Voucher G\L Distribution form (P0411 | W0411K).	This process converts all voucher G\L distribution attachment records in the F00165 table to be coexistent with *JD Edwards World* and with *JD Edwards EnterpriseOne* A\R and G\L systems. Attachments entered for voucher G\L distribution records were written to F00165 with Object Name (OBNM) equal to JEDTLGT. Instead, these should have been written with Object Name equal to GT0911A. For each record in F00165 with Object Name (OBNM) equal to JEDTLGT, this conversion changes the Object Name to GT0911A and modifies the Generic Text Key (TXKY) to match the structure of GT0911A.
R8900165JB	To convert JEDOCGT to GT0911 when upgrading from XE\ERP 8.0.	This is to be run after the F00165 table has been successfully upgraded in the automatic Upgrade Plan. Requires objects:F00165 Convert JEDOCGT to GT0911A.	After running this job, existing Media Objects attachments for Journal Entry document levels are accessible from the Account Ledger Inquiry form (P09200 | W09200A).	This process converts all journal entry document level attachment records in the F00165 table to be coexistent with JD Edwards World and with JD Edwards EnterpriseOne A\R and G\L systems. Attachments entered for journal entry document levels were written to F00165 with Object Name (OBNM) equal to JEDOCGT. Instead, these should have been written with Object Name equal to GT0911A. For each record in F00165 with Object Name (OBNM) equal to JEDOCGT, this conversion changes the Object Name to GT0911A and modifies the Generic Text Key (TXKY) to match GT0911A's structure.
R89060117A	To populate F060117A when upgrading from XE	None	Transfers any values that were stored in	The original F060117 table contains a field to store the

Upgrading from XE \ ERP 8.0				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
	\ERP 8.0 and this job has not been run previously in an ESU.		the F060117 table to the replacement field ALRN15 in the F060117A.	Alien Registration Number (ALRN). However, this field is not long enough to store an Admissions Number, which is an acceptable value for this field. The F060117A tag table was created with an appropriate length field (ALRN15) that replaces the one in the original table.
R89060117	To populate Employee Master Tag Tables when upgrading from XE\ERP 8.0.	None.	This TC populates the F060117 record for every existing F060116 record.	Prior to 8.9 the F060117 table was treated as a tag to F060116, in that it may or may not have a corresponding record in F060117 if a record existed in F060116. After 8.9 the application was changed so that if there was no F060117 record an error would be issued. This TC populates the F060117 record for every F060116 record, so that the application will not error automatically.
R890912	To format OBJ and SUB in F0912 when upgrading from XE\ERP 8.0.	F0912, R890912 and R890912|XJDE0001 are required. The data stored in F0912 from a prior release is required. Suspend activity during the conversion.	Programs and applications requiring access to RJFROM and RJTHRU will not perform properly if the data has not been concatenated.	In *JD Edwards World* , application P0912 Recurring Journal Entry stored data for object and sub in separate fields. In EnterpriseOne, RJFROM and RJTHRU are used to store a combined object and sub. The table conversion concatenates OBJF and FSUB to form RJFROM, and OBJT and SUBT to form RJTHRU. This prevents the trouble of combining object and sub every time the fields are read and displayed. The table conversion retrieves the account separator from the General Accounting Constants for use when combining the two fields.
R891201A	To update WOYN in F1201 when upgrading from XE\ERP 8.0 to create Work Orders against equipment records.	Run after the table conversions have completed.	Work Orders cannot be created against any equipment record that does not have this flag turned on.	Logic was added to reference the Work Order Allowed Flag (WOYN) located in the F1201 table. This flag indicates whether a piece of equipment is allowed to have a Work Order entered against it. Previously WOYN existed in F1201 but was not referenced in the Work Order creation logic.

Upgrading from XE \ ERP 8.0				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R8948SINVF	To convert INVF to Uppercase when upgrading from XE\ERP 8.0.	None.	This job should be run to ensure all Invoice Format Codes within Service and Contract Billing are uppercase and consistent across all tables that store this code.	The Data Item is modified for Invoice Format Code(INVF) to be uppercase only.
R8908601	To update HH05 in F08601 when upgrading from XE\ERP 8.0.	None.	The table conversion R8908601 changes the data for HH05 in F08601 (Injury\Illness Case Master) from 1-7 to 01-05.	The OSHA 300 is now consistent with the one on the OSHA website. The number of injury\illness types has been reduced to 5 from 7. This is a legislative change.
R080101	To set Address Book AT3 and synchronize ALPH and SSN for HR related Address Book records.	None.	This job should be run to ensure synchronization of the ALPH and SSN fields between the F0101 and the F060116, F08401 and F08901.	Many tables used in the workforce management suite have ALPH and SSN fields. The address book table also has these two fields. In an effort to keep the duplicate data consistent across the database a flag in the F0101 (AT3) is set to a Y to indicate that changes should be updated to these additional tables. Previously the synchronization was based solely on search type, this method was deemed in adequate because search type is somewhat user defined and hard coding is not appropriate. This UBE takes existing records in the F0101 and if a matching record exists in one of three tables (F060116, F08401 and F08901) the AT3 flag is updated to a Y. If either the ALPH or SSN is out of sync the F0101 values are updated to the corresponding table.
R7611B	To update BSTT in F7611B when upgrading from XE\ERP8.0, and have not taken ESU #4937298.	Requires clear understanding of the Brazil process on how to populate the F7611B table correctly.	The ICMS Tax Situation Code (BSTT) contains incorrect values if this job is not run.	This is a data conversion UBE that converts the ICMS Tax Situation Code (BSTT) field based on an algorithm. Do not execute for a World A9.2 migration. Do not re-run from the Xe/E80 Post Install menu for World A7.3 migration.

Upgrading from XE \ ERP 8.0				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R897611B	To populate BST1 in F7611B when upgrading from XE\ERP 8.0, and have run the pre-requisite R7611B once.	Requires clear understanding of the Brazil process on how to populate the F7611B table correctly.	The new ICMS Tax Situation Code (BST1) has incorrect values if this job is not run.	Populates a new ICMS Tax Situation code field (BST1) in table F7611B with the concatenated value of Item Origin (BORI) and old ICMS Tax Situation Code (BSTT). This new BST1 field is now of size=3 as compared to size=2 for prior releases. Do not execute for a World A9.2 migration. Do not re-run from the Xe/E80 Post Install menu for World A7.3 migration
R98403A | XJDE0001 * Must Run on the Deployment Server	All customers	Run after all table conversions have been completed. Do not alter the Data Selection for this table conversion. Set processing options to copy the tables from Source Environment JDEPLAN to the Target Environment you are upgrading to, for example, DV9.	Errors due to missing vital data occur if this job is not run. For example, writing to certain accounts could generate an error.	Copies the data contained in demo data on the installation image to the customer's database.
R9500165	To remove RTF formatting. Run if you cannot see any customized dictionary glossaries when viewing them through the application.	Run after table conversion process. Most customers do not need to run the UBE. Check your customized data dictionary glossaries. If they appear to have disappeared, schedule this UBE to run at a convenient time. There is no loss of data. Once the UBE has run, the glossaries are visible. It runs for several hours.	Rerun if glossary items are missing (most likely for Korean and Japanese glossary items).	
R8991300	To upgrade Scheduler Job Master when upgrading from Xe \ERP8.	This conversion must be run before the F0092 series of conversions is complete. That series includes R89959212, R89959211, and R8995921.	Run from the *JDEPLAN* environment.	The conversion reads over the F91300 table row by row. Except for the *Scheduler record it fetches the user group out of F0092 based on the user id stored in SCHUSER in F91300. The user group from F0092 is then stored in SCHROLE.

Upgrading from XE \ ERP 8.0				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
				It is important that customers designate the Properties of the table conversion to input the source environment (for example, DV7333) and the target environment (for example, DV920) so that the records are properly located and updated. If you do not check the Properties box in the Table Conversion Prompting screen, the UBE is submitted with whatever has been previously designated in the options (if anything). Also, because no PDF is created, you should check the TC log in the Print Queue directory to determine if there were errors or any problems during the execution.
R8991320	To upgrade Job Schedule when upgrading from Xe \ERP8.	This conversion must be run before the F0092 series of conversions is complete. That series includes R89959212, R89959211, and R8995921.	Run from the *JDEPLAN* environment.	The conversion reads over the F91320 table row by row. It fetches the user group out of F0092 based on the user id stored in SCHUSER in F91320. The user group from F0092 is then stored in SCHROLE.
R89959212	This UBE populates the F0092 (User Profiles) table and the F00926 (Role Descriptions) from the Roles and Descriptions that may have been previously set up in the UDC H95\RL. This UDC was used for Phase I and is now being removed.	Only required if the customer is upgrading from a release prior to 8.9. If applicable to your upgrade, this UBE should be run as the first in this 3-part sequence: R89959212 R89959211 R8995921	The UBE uses each Role from the UDC H95\RL (the role is stored in the data item column KY in the F0005 table). The UBE populates the UGRP field in the F0092 table with this Role. It also populates the F00926 table with the Role Description, previously in the DL01 and DL02 columns of the F0005 table, the values in these columns are concatenated and inserted into the F00926 table, column ROLEDESC. If the insert to the F0092 table is successful, the F0005D table is then fetched upon to retrieve all of the	The 8.9 release introduces Roles. If upgrading from a release prior to 8.9, you must run a sequence of UBEs to convert Groups (as listed in the F0092) table to Roles. This creates a sequence number for each role and inserts role relationships based upon users \group records in the F0092 table.If you are running ERP 8.9 or later and wish to upgrade, you do not need to run these UBEs as the F0092, F00926 and F95921 tables already contain the necessary records.

Upgrading from XE \ ERP 8.0				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
			possible language descriptions for the Role Descriptions. Those, as well, are populated in the F00926 table. Each Domestic Language Record in the F00926 table contains a Sequence Number. When running this UBE, the sequence numbers begin at 500 and increase by 5.	
R89959211	This TC takes all current Groups in the UGRP field in the F0092 table and adds a Description record for them in the F00926 table. The Role is the Group name (Ex: OWTOOL), the description is also the Group Name as a description is required. A sequence Number is added to the F00926 record as well. This sequence number begins at 1000 and increments by 5 with each record written.	Only required if the customer is upgrading from a release prior to 8.9. If applicable to your upgrade, this UBE should be run as the second in this 3-part sequence: R89959212 R89959211 R8995921	The UBE retrieves each Group from the F0092 table. It populates the USER field in the F00926 table with this Role. It also populates the F00926 table with the Role Description which is also the Group value from the F0092 table. This value is inserted into the F00926 table, column ROLEDESC. Each Domestic Language Record in the F00926 table contains a Sequence Number. When running this UBE, the sequence numbers begin at 1500 and increase by 5.	Refer to Notes in R89959212 above.
R8995921	This TC takes all current User Profiles records in the F0092 table and inserts a User \Role Relationship Record based on the F0092.USER and F0092.UGRP tables. The record that is added to the F95921 table contains the User, Role (formerly the Group for this user in the F0092 table), Effective and Expiration Dates. Some of these values are based upon the values in the processing option.	Only required if the customer is upgrading from a release prior to 8.9. If applicable to your upgrade, this UBE should be run as the third in this 3-part sequence: R89959212 R89959211 R8995921 Values in the records inserted into the	The UBE retrieves each User Record from the F0092 (User Profiles) table. It populates the following output fields: F95921.RLFRROLE - F0092.USERF95921.RLT - F0092.UGRPF95921.RL - PO EffectiveDateF95921.RL - PO ExpirationDateF95921.R - PO cIncludedInAllF95921.R - "0" And Audit Info. The F95921 table is inserted with the	Refer to Notes in R89959212 above.

Upgrading from XE \ ERP 8.0				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
		F95921 table are based upon those inserted into the processing option at submission time.	information above. One Record per user in the F0092 table. If the Mode of the version is Final, the F0092.UGRP field is left blank for all users in the F0092 table.	
R8931CTSX	To convert CTS1, CTS2, CTS3, and CTS9 (collectively referred to as CTSx) data item values from 2 display decimals to match the display decimals of the TRQT data item (4 decimals).	You must run this program to increase the decimal precision of the CTSx data items if you use these data items to store unaccounted units.	The R8931CTSX table conversion program retrieves the TRQT data dictionary display decimals and converts the values of the CTSx data items in all affected tables to match the TRQT display decimals. The R8931CTSX program calls the Data Decimal Conversion business function (B8900010) for each CTSx data item. The UBE locates all tables containing the data item and selects non-zero values for conversion. The program converts the CTSx value and updates the table.	The default setting of the CTSx data items to 2 display decimals may cause rounding discrepancies. Therefore, Oracle recommends that you run this table conversion program to increase the decimal precision of the CTSx data items. After running the R8931CTSX program, change the display decimal setting of the CTSx data items in the E920 data dictionary to 4 to match the display decimal setting of the TRQT data item. For more information, refer to the Data Conversion Updates for Decimal Precision of Unaccounted Units document (2438553.1) on My Oracle Support: *https://support.oracle.com/epmos/faces/DocumentDisplay?id=2438553.1*

Upgrading from 8.9 or Below

This section contains a list of all the Table Conversions required when upgrading from 8.9 or below.

Upgrading from 8.9 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R48803	Convert Document Type for existing orders by running the post	Review who should run the UBE, requirements	Not applicable.	This is not a Table conversion for converting data from prior release.

Upgrading from 8.9 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
	install *JD Edwards EnterpriseOne* UBE R48803.	of the UBE, and the purpose of this UBE.		This is a post install UBE that needs to be run one time to convert Order Types for existing records. This conversion is necessary because of changes made to Document Types, based on EPM requirements. The new document type is defined in the processing options. For the orders selected in the data selection, the document type is converted.
R891207B	To update PDFG in F1207 when upgrading from 8.9 or below.	The TC should be run over the entire F1207 table.	This post-install job reads through existing maintenance schedules in the F1207 and updates the schedule type (PDFG) field with a "1" for those schedules that have no service intervals defined.	As part of the Condition-Based Maintenance enhancement, the schedule type (PDFG) field is now utilized on the Equipment PM Schedule (F1207) record to identify the type of maintenance. A value of blanks is for Interval Based Maintenance. A value of "1" is for Unschedule Maintenance. A value of "2" is for Condition-Based Maintenance.
R8912071B	To update PDFG in F12071 when upgrading from 8.9 or below.	The TC should be run over the entire F12071 table.	This post-install job reads through existing model maintenance schedules in the F12071 and updates the schedule type (PDFG) field with a "1" for those schedules that have no service intervals defined.	As part of the Condition-Based Maintenance enhancement, the schedule type (PDFG) field is now utilized on the Equipment PM Schedule Model (F12071) record to identify the type of maintenance. A value of blank is for Interval Based Maintenance. A value of "1" is for Unscheduled Maintenance. A value of "2" is for Condition-Based Maintenance.
R3210CFGID	To convert Config ID when upgrading from 8.9 or below.	None.	This UBE determines the highest seed from F3201 and writes it to Bucket 2 of Next Numbers System 32.	The Configuration ID (which is the primary key field of Configurator F3201 Master File) will now be retrieved from Next Number instead of using the "seed" record in F3201 Configurator Master Table.
R8931CTSX	To convert CTS1, CTS2, CTS3, and CTS9 (collectively referred to as	You must run this program to increase the decimal precision of the	The R8931CTSX table conversion program retrieves the TRQT	The default setting of the CTSx data items to 2 display decimals

Upgrading from 8.9 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
	CTSx) data item values from 2 display decimals to match the display decimals of the TRQT data item (4 decimals).	CTSx data items if you use these data items to store unaccounted units.	data dictionary display decimals and converts the values of the CTSx data items in all affected tables to match the TRQT display decimals. The R8931CTSX program calls the Data Decimal Conversion business function (B8900010) for each CTSx data item. The UBE locates all tables containing the data item and selects non-zero values for conversion. The program converts the CTSx value and updates the table.	may cause rounding discrepancies. Therefore, Oracle recommends that you run this table conversion program to increase the decimal precision of the CTSx data items. After running the R8931CTSX program, change the display decimal setting of the CTSx data items in the E920 data dictionary to 4 to match the display decimal setting of the TRQT data item. For more information, refer to the Data Conversion Updates for Decimal Precision of Unaccounted Units document (2438553.1) on My Oracle Support: *https://support.oracle.com/epmos/faces/DocumentDisplay?id=2438553.1*

Upgrading from 8.10 or Below

This section contains a list of all the Table Conversions required when upgrading from 8.10 or below.

Upgrading from 8.10 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R8901151	To move Email Address from F0111 to F01151 when upgrading from 8.10 or below.	Four pocessing Options exist for this conversion: 1 - Run in Proof or Final Mode. 2 - Do you want to reset the remark field in F0101 to blank or not. 3 - Enter the default value of the Email Hierarchy field.	This conversion moves Email addresses from the Who's Who table (F0111) to the Electronic Address table (F01151). If this is not run, Email addresses will not be accessible.	The UBE prints out a pdf listing the records processed and displays how the F01151 columns were updated.

Upgrading from 8.10 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
		4 - Process all records or only records with an associated User ID.		
R891755B	To convert F1755 for Case when upgrading from 8.10 or below.	Three Processing Options exist for this TC: 1 - Enter the time zone of the system date and time. 2 - Enter the daylight savings rule of the system date and time. 3 - Do you want to update the work order table with the case number of the record being converted? "0" - Do Not Update. "1" Update.	To convert the existing dates and times in F1755 to UTC time. To blank out the work order number in F1755 and to populate case number in F4801.	
R3210CFGID	To convert Config ID when upgrading from 8.10 or below.	None.	This UBE determines the highest seed from F3201 and writes it to Bucket 2 of Next Numbers System 32.	The Configuration ID (which is the primary key field of Configurator F3201 Master File) will now be retrieved from Next Number instead of using the "seed" record in F3201 Configurator Master Table.
R01302	To convert F0101 Compressed Description when upgrading from 8.10 or below.	Run this UBE when UDC H95|SC has changed. The values shipped with the software are: ~!@#^&*()_+ `-={}|[]\:";'<>?,.\	This UBE strips off special characters from the DC field in F0101 as a result of changing the UDC H95|SC (Word Search Special Characters).	If the UDC H95|SC values are changed and an address book record is added, this will cause inconsistencies in the DC fields. An example of this would be the blank value. If blank is part of the list, the "Digger Corporation" will be stripped to be "DIGGERCORPORATION" in the DC field else it would be "DIGGER CORPORATION".
R890911CA	To populate F0911 Foreign Amount when upgrading from 8.10 or below.	Run after the table conversions have completed.	A new foreign amount field (GLACR) is added to the AccountLedger table. The TC will populate the new foreign amount field based on the existing CA ledger records.	A new foreign amount field (GLACR) is added to the Account Ledger table so all of the currency information is available in one F0911 record and the extra CA record is no longer needed. The system continues to

Upgrading from 8.10 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
				write the CA ledger records during this first phase.
R890911PCA	To populate F0911P Foreign Amount when upgrading from 8.10 or below.	Run after the table conversions have completed.	A new foreign amount field (GLACR) is added to the Account Ledger Purge table. The TC will populate the new foreign amount field based on the existing CA ledger records.	A new foreign amount field (GLACR) is added to the Account Ledger Purge table so all of the currency information is available in one F0911 record and the extra CA record is no longer needed. The system continues to write the CA ledger records during this first phase.
R8931CTSX	To convert CTS1, CTS2, CTS3, and CTS9 (collectively referred to as CTSx) data item values from 2 display decimals to match the display decimals of the TRQT data item (4 decimals).	You must run this program to increase the decimal precision of the CTSx data items if you use these data items to store unaccounted units.	The R8931CTSX table conversion program retrieves the TRQT data dictionary display decimals and converts the values of the CTSx data items in all affected tables to match the TRQT display decimals. The R8931CTSX program calls the Data Decimal Conversion business function (B8900010) for each CTSx data item. The UBE locates all tables containing the data item and selects non-zero values for conversion. The program converts the CTSx value and updates the table.	The default setting of the CTSx data items to 2 display decimals may cause rounding discrepancies. Therefore, Oracle recommends that you run this table conversion program to increase the decimal precision of the CTSx data items. After running the R8931CTSX program, change the display decimal setting of the CTSx data items in the E920 data dictionary to 4 to match the display decimal setting of the TRQT data item. For more information, refer to the Data Conversion Updates for Decimal Precision of Unaccounted Units document (2438553.1) on My Oracle Support: *https://support.oracle.com/epmos/faces/DocumentDisplay?id=2438553.1*

Upgrading from 8.11 or Below

This section contains a list of all the Table Conversions required when upgrading from 8.11 or below.

Upgrading from 8.11 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R8908771A	To populate F08771A when upgrading from 8.11 or below.	The Processing Option of this job sets the value for the new field MSEB in the table F08771A.	This TC populates the F08771A tag table with the MSEB value from the processing option value selected.	The tag table F08771A was added with the MSEB column to allow managers to signoff on the final performance appraisal on behalf of the employee. A value of "1" means Yes, managers can approve or contest the final appraisal on the employee's behalf. A value of "0" means No, employees access the appraisal system through Employee Self Service and approve or contest the appraisal themselves.
R8908772A	To populate F08772A when upgrading from 8.11 or below.	The Processing Option of this job sets the value for the new field MSEB in the table F08772A.	This TC populates the F08772A tag table with the MSEB value from the processing option value selected.	The tag table F08772A was added with the MSEB column to allow managers to signoff on the final performance appraisal on behalf of the employee. A value of "1" means Yes, managers can approve or contest the final appraisal on the employee's behalf. A value of "0" means No, employees access the appraisal system through Employee Self Service and approve or contest the appraisal themselves.
R8908773A	To populate F08773A when upgrading from 8.11 or below.	The Processing Option of this job sets the value for the new field MSEB in the table F08773A.	This TC populates the F08773A tag table with the MSEB value from the processing option value selected.	The tag table F08773A was added with the MSEB column to allow managers to signoff on the final performance appraisal on behalf of the employee. A value of "1" means Yes, managers can approve or contest the final appraisal on the employee's behalf. A value of "0" means No, employees access the appraisal system through Employee Self Service and approve or contest the appraisal themselves.
R89087711A | XJDE0001	To populate F087711A Current when upgrading from 8.11 or below.	The Processing Option of this job sets the value for the new field MSEB in the table F087711A.	This TC populates the F087711A tag table with the MSEB value from the processing option value selected.	The tag table F087711A was added with the MSEB column to allow managers to sign off on the final performance appraisal on

Upgrading from 8.11 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
				behalf of the employee. A value of "1" means Yes, managers can approve or contest the final appraisal on the employee's behalf. A value of "0" means No, employees access the appraisal system through Employee Self Service and approve or contest the appraisal themselves.
R89087711A | XJDE0002	To populate F087711A Historic when upgrading from 8.11 or below.	The Processing Option of this job sets the value for the new field MSEB in the table F087711A.	This TC populates the F087711A tag table with the MSEB value from the processing option value selected.	The tag table F087711A was added with the MSEB column to allow managers to sign off on the final performance appraisal on behalf of the employee. A value of "1" means Yes, managers can approve or contest the final appraisal on the employee's behalf. A value of "0" means No, employees access the appraisal system through Employee Self Service and approve or contest the appraisal themselves.
R890411B	To generate F76C4011 from F0411 when upgrading from 8.11 or below.			
R8913907A	To convert F13907 SWO (Separate Work Order) field from 8.11 or below.	Run after the table conversions have completed.	Any data in the SWO field that used to be a Y will be changed to a 1. Any data in the SWO field that used to be an N will be changed to a 2.	Prior to 8.11 SP1, there was no editing for the Separate Work Order (SWO) field in the Associative Service Types (P13907) application. The existing application allowed entries of Y, N, 1, or 2, however the UDC attached to the SWO data dictionary only listed values of 1 and 2. To keep things simple, editing was turned on for the DD item so new entries into that fields would be validated against the UDC. Since clients could have existing data that used a Y or N, this post-install was created to correct that data.

Upgrading from 8.11 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R8976V01	To generate F76C4015 from F0411 when upgrading from 8.11 and SAR 7668978 has not been previously applied. Do not run if upgrading from 8.10 or below.	Requires use of Venezuela's localization.	For each Credit\Debit Note in table F0411 related to a Voucher in table F0411, the TC generates a record into table F76V4015 to relate the Credit\Debit Note and the Voucher.	
R8976V02	To generate F76V4011 from F76V0401 when upgrading from 8.11 and SAR 7668978 has not been previously applied. Do not run if upgrading from 8.10 or below.	Requires use of Venezuela's localization.	For each record in table F76V401, the TC generates a record into table F76V4011 to store the localized voucher information.	
R893016	To populate F3016T from F3016 when upgrading from 8.11 or below.	None.	This TC creates a corresponding F3016T tag record for every existing F3016 record.	
R893283F	To fix CTKID in F3283 when upgrading from 8.11 or below.	None.	This TC cleans up the data in F3283 for the entire table.	This report should fix all the records. If there are any problems, the records shall be listed on the report. These problematic records can be re-run using R893283L UBE, which uses data selection. Run the records that had issues. If problems persist, these records may need to be manually removed from the database and re-added.
R893283L	To fix CTKID in select F3283 records when upgrading from 8.11 or below.	R893283F	This TC cleans up the data in F3283 for select records.	Run this TC only if there were problematic records reported in R893283F.
R893215F	To fix CFGSID in F32xx when upgrading from 8.11 or below.	None.	This TC cleans up the data in F3215, F3211, F32119, F32159 and F41021 for the entire table.	This report should fix all the records. If there are any problems, the records shall be listed on the report. These problematic records can be re-run using R893215L UBE, which uses data selection. Run the records that had issues. If problems persist, these records may need to be manually removed from the database and re-added.

Upgrading from 8.11 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R893215L	To fix CFGSID in select F32xx records when upgrading from 8.11 or below.	R893215F	This TC cleans up the data in F3215, F3211, F32119, F32159 and F41021 for select records.	Run this TC only if there were problematic records reported in R893215F.
R099102	To populate the new Debit Amounts AND01-14 in F0902 when upgrading from 8.11 or below.	Run after the table conversions have completed.	The Repost on menu G09316 updates the F0902 table with the Debit Amounts.	Debit fields AND01-14 that were formerly located in tag table F0902A were added to the F0902. Many applications require data for total debits or total credits. Prior to the change, the data was obtained from the F0911, causing performance issues. With this change the data is retrieved from the F0902 resulting in improved performance.
R8900165JC | XJDE0001	To convert media object data from GT0901 to ACCGT for Job Status Inquiry.	None.	This conversion copies the data in F00165 for GT0901 to ACCGT so Job Status Inquiry can access the media object.	Prior to 8.11 SP1, Job Status Inquiry was using the media object for GT0901 but all of the other job cost applications were using ACCGT. In order to make the media object data consistent across all of job cost, Job Status Inquiry was changed to use ACCGT instead of GT0901. You only need to run this conversion if you are using Job Status Inquiry with media object data in GT0901.
R8931CTSX	To convert CTS1, CTS2, CTS3, and CTS9 (collectively referred to as CTSx) data item values from 2 display decimals to match the display decimals of the TRQT data item (4 decimals).	You must run this program to increase the decimal precision of the CTSx data items if you use these data items to store unaccounted units.	The R8931CTSX table conversion program retrieves the TRQT data dictionary display decimals and converts the values of the CTSx data items in all affected tables to match the TRQT display decimals. The R8931CTSX program calls the Data Decimal Conversion business function (B8900010) for each CTSx data	The default setting of the CTSx data items to 2 display decimals may cause rounding discrepancies. Therefore, Oracle recommends that you run this table conversion program to increase the decimal precision of the CTSx data items. After running the R8931CTSX program, change the display decimal setting of the CTSx data

Upgrading from 8.11 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
			item. The UBE locates all tables containing the data item and selects non-zero values for conversion. The program converts the CTSx value and updates the table.	items in the E920 data dictionary to 4 to match the display decimal setting of the TRQT data item. For more information, refer to the Data Conversion Updates for Decimal Precision of Unaccounted Units document (2438553.1) on My Oracle Support: *https://support.oracle.com/epmos/faces/DocumentDisplay?id=2438553.1*

Upgrading from 8.11 SP1 or Below

This section contains a list of all the Table Conversions required when upgrading from 8.11 SP1 or below.

Upgrading from 8.11 SP1 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R8908495	To convert GT08495 Media Object from 8.11 SP1 or below.	This is to be run after the F00165 table has been successfully upgraded in the automatic Upgrade Plan.	N\A	This media object supported resumes and cover letters in the eRecruit module. Changes were made to allow the resume and cover letter to be searched with Verity text search.
R8908490I	To save Internal Applicant Address Info when upgrading from 8.11 SP1 or below.	None.	N\A	
R89069116A	To convert F069116 from 8.11 SP1 or below.	The processing option on this job prompts the user for a value to update the new field DEFR in F069116.	To update the new column DEFR in F069116. It is updated with a value of "1", "2", or "3" based on the processing option value.	This TC simply calls a BSFN (B8902023) that will do a mass update to DEFR based on the processing option value.

Upgrading from 8.11 SP1 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R8901301D	To convert Activities from 8.11 SP1.	Prior to running this post upgrade UBE, all users of activity system should already have universal time (time zone) and daylight savings rule set in their user profiles. The processing option on this job prompts the user to enter the maximum number of occurrences for never ending activities.	To populate new and changed fields in F01301. To populate new field in F01331 and create new exclusion records for assignees. To write activity details in F01301D. For recurring activity with no end date: To update F01321 with a calculated end date based on the maximum number of occurrences specified in the Processing Option. To update F01321 with the combination of the originator's time zone and daylight saving rules (separated by |).	F01301 (Activity Header): The owner parent record is assigned a new GUID for the group activity ID. All assignee's activity records are reassigned the same GUID as the parent owner. "All Day" events and tasks are now stored with time starting 00:00:00 and ending 23:59:59 local time of the orignator's time zone from the user profile. F01331 (Exclusion): The existing exclusion record is updated with the Activity id of the Owner Master record. New exclusion records are created for the excluded assignee's series. The activity id updated for the new exclusion records is the activity id of the assignee's master record. F01321 (Recurrence Master): For recurring activities that have no end date, a finite end date is calculated based on the max number of occurrences specified in the UBE processing option. In addition, the combination of the activity's originator's time zone and daylight saving rule (fields separated by |) is updated in URCH. F01301D (Activity Details): Physical activity records for every instance of a recurring activity rescind in the new activity detail table F01301D. Activity search applications are changed to search over this new table, which allows for faster and easier search capabilities.
R4801T1	To populate F4801T1 from F4801T when upgrading from 8.11 SP1 or below. Only customers that have data for ETO in F4801 need to run this TC. Do not run this TC if	None.	This post-install UBE will populate table F4801T1 with data from F4801T. If there are records in F4801T with PRJM (project number) field populated corresponding records	

Upgrading from 8.11 SP1 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
	the ESU was applied prior to upgrade.		would be created in F4801T1. The only field that gets populated from F4801T into F4801T1 is DOCO.	
R8931CTSX	To convert CTS1, CTS2, CTS3, and CTS9 (collectively referred to as CTSx) data item values from 2 display decimals to match the display decimals of the TRQT data item (4 decimals).	You must run this program to increase the decimal precision of the CTSx data items if you use these data items to store unaccounted units.	The R8931CTSX table conversion program retrieves the TRQT data dictionary display decimals and converts the values of the CTSx data items in all affected tables to match the TRQT display decimals. The R8931CTSX program calls the Data Decimal Conversion business function (B8900010) for each CTSx data item. The UBE locates all tables containing the data item and selects non-zero values for conversion. The program converts the CTSx value and updates the table.	The default setting of the CTSx data items to 2 display decimals may cause rounding discrepancies. Therefore, Oracle recommends that you run this table conversion program to increase the decimal precision of the CTSx data items. After running the R8931CTSX program, change the display decimal setting of the CTSx data items in the E920 data dictionary to 4 to match the display decimal setting of the TRQT data item. For more information, refer to the Data Conversion Updates for Decimal Precision of Unaccounted Units document (2438553.1) on My Oracle Support: *https://support.oracle.com/epmos/faces/DocumentDisplay?id=2438553.1*

Upgrading from 8.12 or Below

This section contains a list of all the Table Conversions required when upgrading from 8.12 or below.

Upgrading from 8.12 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R09E115	To update Expense Location UDC Codes when upgrading from 8.12 or below.	None.	To reformat the values in UDC 09E|EL.	The size of the UDC Code 09E|EL has been increased to 10 characters. This caused the values to be left padded

Upgrading from 8.12 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
				with spaces to make up the difference in size. This UBE will remove that left padding.
R05041	To add data items to Future Data \ History Tracking when upgrading from 8.12 or below.	None.	To create a record in F06041 and F08041 for each new data item added to the F060116. For records added, set respective flags in tables (ICDE, XCOD) = "N"	F06041 - Future Data FieldsF08041 - History Tracking Fields. These tables are pre-populated with records that the client may toggle to "on" or "off" for tracking history. In 90, 2 new fields were added, that will be shipped with the data set. For customers upgrading, from say 812 to 90, the ube would be run to add the two new records, but maintain the existing data set that the customer may have changed. This UBE should ensure that the client's preferences are not lost, while gaining the ability to modify the two new records.
R98305V	When upgrading from 8.12.	None	To convert all existing Web Only versions to full versions.	None
R8915L101A	To change GT15L101 Key when upgrading from 8.12 or below.	This post-install UBE, must be run AFTER the R8915L101 TC has completed successfully.	The purpose of this Table Conversion is to enable customers to convert existing media objects in the F00165 that match the GT15L101 media object structure. Since the F15L101 table was changed to include UKID in the primary key, the resulting media objects attached to the unit master were also changed to match this key. As a result, a conversion was written to "re-key" those media objects to utilize the updated key structure. This conversion was required as a result of changes made to support inclusion of multiple leases (i.e. future leases and speculative leases).	This conversion program does not need to be run unless the Media Objects Storage (F00165) table contains very specific data. If the OBNM field of any record contains GT15L101, the table conversion is necessary. Although it is not harmful to run the procedure anyway, you can determine if the table conversion is necessary by performing the following SQL statement (with the appropriate syntax, against the appropriate database). Select count (*) from F00165 where GDOBNM = 'GT15L101' If the returned count is greater than zero, the conversion program must be run. This count is the number of records that are

Upgrading from 8.12 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
				candidates to be analyzed by this UBE.
R89I100B	When upgrading from previous releases and running India Localizations.	Apply ESU for SAR 8868437 to add R89I100B to the menu. If the ESU has not been applied and the conversion needs to be run, you must do it manually from Batch Versions.	To combine the information from F75I100 and F75I101A into one table and add new fields for TDS Certificate functionality.	This table was modified to save information that was in the F75I100 table and F75I101A table. Also, some new fields were added to this table. The conversion program copies the old F75I100 records, completes the new fields with blank or zero, and moves information from F75I101A to F75I100 record.
R8940G00	To convert all Grower Area fields to the correct format based on the new display decimals when upgrading from 8.12 or below.	Four processing Options exist for this conversion: 1 - Data Item Class. 2 - New Data Display Decimals. 3 - Enter 1 to Update the Display Decimals in the Data Dictionary. 4 - Enter 1 to convert the data and update the tables.	Display decimal changes in the Data Dictionary are not updated through the upgrade process. A new data class is created for the grower area fields (GROWERAREA). This post install UBE will update the display decimals (specified in the UBE processing options) for the new data class. The UBE will also convert the data to the correct format for the new display decimals for the following tables: F40G03 - Harvest Master F40G0300 - Update Harvest Profile F40G02 - Block Master F40G0200 - Update Block Profile F40G65 - Farming Operation Header F31B70 - Vessel Assignment Table	The following DB items were created with varying lengths and no display decimals. In 9.0, they are modified to have display decimals with a length of 4. The DD items are: PLTAREA, GRSAREA, TRTAREA, PAREA1, PAREA2, PAREA3.
R48S84A	When upgrading from 8.11 SP1 or 8.12 and you have existing Pool Grouping	Run this batch application after the	This batch application will update the ending date if applicable on	An Ending Effective Date has been added to the F48S84 table. This job

Upgrading from 8.12 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
	Code records in the F48S84 table.	F48S84 table has been converted.	records in the Pool Grouping Code Table (F48S84).	should be run to ensure there is no overlapping pool grouping code records. If there is a pool grouping code with different begin dates, the batch application R48S84A will update the ending date of the earlier record with an ending date one day prior to the begin date of the next record. *Note:* This Post Install UBE is only needed when upgrading from 8.11 SP1 and 8.12
R8931CTSX	To convert CTS1, CTS2, CTS3, and CTS9 (collectively referred to as CTSx) data item values from 2 display decimals to match the display decimals of the TRQT data item (4 decimals).	You must run this program to increase the decimal precision of the CTSx data items if you use these data items to store unaccounted units.	The R8931CTSX table conversion program retrieves the TRQT data dictionary display decimals and converts the values of the CTSx data items in all affected tables to match the TRQT display decimals. The R8931CTSX program calls the Data Decimal Conversion business function (B8900010) for each CTSx data item. The UBE locates all tables containing the data item and selects non-zero values for conversion. The program converts the CTSx value and updates the table.	The default setting of the CTSx data items to 2 display decimals may cause rounding discrepancies. Therefore, Oracle recommends that you run this table conversion program to increase the decimal precision of the CTSx data items. After running the R8931CTSX program, change the display decimal setting of the CTSx data items in the E920 data dictionary to 4 to match the display decimal setting of the TRQT data item. For more information, refer to the Data Conversion Updates for Decimal Precision of Unaccounted Units document (2438553.1) on My Oracle Support: ***https://support.oracle.com/epmos/faces/DocumentDisplay?id=2438553.1***

Upgrading from 9.0 or Below

This section contains a list of all the Table Conversions required when upgrading from 9.0 or below.

Upgrading from 9.0 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R43S001	When upgrading from 9.0 or below and ESU has not already been installed in prior release.	F43S001, UDC 43S|AL	This TC will populate the F43S001 table with the list of supported alerts from the UDC 43S|AL.	If ESU was installed in From Release, then this conversion does not need to be run again.
R41B100	To update data in tables that contain the VCF data item; it does not modify the table structure. It should be run in Final mode only once. It can be run in Proof mode multiple times. Proof mode does not perform any updates.	Users should verify that this report has not already been run. It was required if the user took the ESU for SARs 8567415 (Xe), 8757032 (8.12) or 8820775 (9.0).	This report converts the data in the Volume Correction Factor (VCF) field of the tables listed below from 4 decimals to 5 decimals. Tables containing VCF: F38111 - Agreements Transaction Ledger F41511 - Bulk Product Transaction File F41515 - Multi-Meter Readings F49211- Sales Order Detail File - Tag F49211Z1- Sales Order Detail Tag Unedited F49219- Sales Order Detail - Tag History F4963 - Load In-transit F49631- Load In-transit Ledger F49632 - Load In-transit Left on Board F49299 - S.O. Detail Tag Ledger File	The report should be run in Proof mode first. If the processing option to display the records is set to 1, the report will display all the records that will be updated and what the volume correction factor will be updated to. If the processing option is not set to display records, the total number of records in each table that will be updated is displayed. Run the report in Final mode only one time, regardless of the value of the processing option to display records. If the report is run in Final mode more than once, the data will be incorrect.
R8940G34	To populate item and harvest pattern information that was previously stored in the Grower Block table (F40G02) into the Harvest Item Master (F40G034).	This TC is dependent upon the *ALTER record being processed successfully for the Grower Block table (F40G02) and the Grower Harvest table (F40G03). The *ALTER conversions will convert the tables to the Release 9.1 format. Then	F40G034 table was added to support crop rotation functionality in which item is an attribute of the harvest rather than of the block. A record is inserted into F40G034 for every Grower Harvest	This TC is also being released in an ESU for Release 9.0. Users upgrading from Release 9.0 to Release 9.1 that have taken the ESU will not be required to run the Post Install table conversion. R8940G34 deletes existing records found in F40G034

Upgrading from 9.0 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
		R8940G34 can be run to process the records and populate the F40G034 columns.	record (F40G03) for each Block record (F40G02). F40G034 will be populated with the Vessel ID from F40G03 and with Short Item Number, 2nd Item Number, 3rd Item Number, and Harvest Pattern from F40G02.	before creating new records so it may be run more than once without errors.
R41806	To automatically mark all item and item branch records as country of origin required.	None	The TC should be run as a post install only if the Country of Origin functionality is desired after an upgrade to Release 9.1.	The user should set up data selection only for those items and branches for which they wish to activate the country of origin required functionality. Users will need to specify proof or final mode, and decide whether to activate the country of origin at the item master level. The user can also specify a default country of origin value to give to the item branch records.
R41807	After the country of origin required flag has been activated for the first time on an existing item branch you will use this TC to update all existing lots to the correct country of origin.	Should be run after the R41806.	This TC is run once the required flag has been activated and if this is being run as part of the post install process it should be run after the R41806 is run.	User should restrict any lots that already have a country of origin from the data selection. There is a proof and final mode processing option, and there is a default value for the country of origin for the lot.
R31B8505	This TC will update all data currently residing in the weigh tag master file which currently contains lot information to now contain lot and country of origin information.	Should be run after the R41806 and R41807.	This TC should be run as a post install and only if the client utilizes the grower weigh tag functionality.	There is a proof and final mode processing option, and there is a default value for the country of origin for the lot.
R8976A08	This process copies current Country of Origin data at Item/Lot level used by Argentina Localization (field LRP9 of F4108) to the new ORIG field into table F4108.	The process has to be executed only when the customer is using Argentina Localization and selling Imported Items by Sales Order module.	This UBE has to be executed as a Post Install from any prior releases to Release 9.1 or higher releases.	In case the country codes in UDC 41/L9 are not the same than UDC 00/CN, the user has to define the mapping between values using the special handling code of UDC 41/L9. That means special handling code of UDC 41/L9 should contains the corresponding country code of UDC 00/CN.

Upgrading from 9.0 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
				Execute R8976A08 selecting the correct Lots from F4108 by user data selection. For a given record, the value into ORIG field of F4108 has to contain the same country than the value of LRP9 field.
R95SQAQ	To convert old saved queries to new enhanced queries.	This is to be run if you use Saved Query. To verify, please check if you have records in F98950 table with field UOTY = "SQ"	Enhanced Query uses a different format than Saved Query to store the queries. This conversion program provides users a way to convert your old saved queries to the new format that Enhanced Query uses.	User can use the PO Template D95SQAQPO to specify any combination of 3 attributes (User ID and/ or Application Name and/ or Form Name) to filter the old queries to be converted to the new format. Records in F98950 and F98950D are converted during the process. The old SQ records are NOT deleted during the conversion.
R8931CTSX	To convert CTS1, CTS2, CTS3, and CTS9 (collectively referred to as CTSx) data item values from 2 display decimals to match the display decimals of the TRQT data item (4 decimals).	You must run this program to increase the decimal precision of the CTSx data items if you use these data items to store unaccounted units.	The R8931CTSX table conversion program retrieves the TRQT data dictionary display decimals and converts the values of the CTSx data items in all affected tables to match the TRQT display decimals. The R8931CTSX program calls the Data Decimal Conversion business function (B8900010) for each CTSx data item. The UBE locates all tables containing the data item and selects non-zero values for conversion. The program converts the CTSx value and updates the table.	The default setting of the CTSx data items to 2 display decimals may cause rounding discrepancies. Therefore, Oracle recommends that you run this table conversion program to increase the decimal precision of the CTSx data items. After running the R8931CTSX program, change the display decimal setting of the CTSx data items in the E920 data dictionary to 4 to match the display decimal setting of the TRQT data item. For more information, refer to the Data Conversion Updates for Decimal Precision of Unaccounted Units document (2438553.1) on My Oracle Support: *https://support.oracle.com/epmos/faces/DocumentDisplay?id=2438553.1*

Upgrading from 9.1 or Below

This section contains a list of all the Table Conversions required when upgrading from 9.1 or below.

Upgrading from 9.1 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R8974311	This table conversion program copy data from F743011 to F743013. The data item K74SSIGN was changed from BLOB Data Type to String. The Table F743011 will be obsolete.	None		
R8974311Z	This table conversion program copies data from F743011Z to F743013Z. The data item K74SSIGN was changed from BLOB Data Type to String. The Table F743011 will be obsolete.	None		
R8976427	This table conversion program changes F76B427 and F76B429. Only IRPJ and INSS values calculated are stored in table Service Nota Fiscal Withholdings by Formula-F76B427. PIS, COFINS and CSLL are stored in a new table, Service Nota Fiscal WH by Formula Installment F76B429.	None		
R41B110	This post install UBE (R41B110) populates records into Tank Master Additional Information Tag File (F41500T) based on the exiting transactions from tables Tank Master File (F41500) and Item Ledger File (F4111).	None	This UBE must be executed as a Post Install step from any release prior to Release 9.1 or higher.	This UBE has a proof and final mode processing option.

Upgrading from 9.1 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
R4600T1	This table conversion creates records in Warehouse Request Tag table (F4600T1) corresponding to the warehouse requests (F4600) at status (PSTB) 200, 210, 215,220, 291 and 299.	None	R4600T1 will calculate several new Warehouse fields and create an associated F4600T1 record for every record in the F4600 table.	There should be a one for one record created between the F4600 and F4600T1.
R4611T1	This table conversion creates records in Warehouse Suggestion Tag table (F4611T1) corresponding to the warehouse suggestions table (F4611) that are at status (PSTB) 300, 391 and 399.	None	R4611T1 will calculate several new Warehouse fields and create an associated F4611T1 record for every record in the F4611 table. This is applicable to customers using the ADP payroll system	There should be a one for one record created between the F4611 and F4611T1.
R79A101	To populate the EA&R Sources tag table.	None	This Batch Job or Table Conversion is used to Populate data in F79A03T and F79A039T Tag Tables from F79A03 (GHG Source). This conversion is used for upgrade from Release 9.1 to higher when there is existing data in F79A03.	A new column Energy type is added for GHG source table and for the F79A03T and F79A039 Tag tables.
R059130	To convert group limits that are currently setup in the F069116 (PDBA Setup) table to records in the new Group Limits table F069130.	None	The limits in F069116 are functionally changed to be individual DBA limits. This UBE takes all DBA limits from the F069116 where group limit is populated and use the group limit code to create a new record in the F069130 with the limits previously populated on the F069116. The F069116 limit amounts are cleared for those DBA codes.	

Upgrading from 9.1 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
			No file changes are done.	
R98222UDO - Add Converted Personal UDOs to Default Project	After the table Conversions have run for the target environment you should run this job in Proof mode to view the list of objects that will be added to default projects. Run in Final mode to commit those objects to the default projects.	In order for this UBE to run properly, there must be data in the F9861W table. This table is populated when UDOs are converted or created. For a new install, convert the current UDOs first and then run this UBE to add ay personal objects to the default projects of the end users who created them. It is important to know that if the user who created the UDO does not exist, that user id will not be created and the object will not be added to that default project (as it does not exist).	The purpose of this UBE is to add personal UDOs, those that are not *PUBLIC, to the default projects of the end users who created them so that they can continue to work on them. After the UDO Conversion processes are complete, the F9861W table will contain UDOs detail information for both *PUBLIC and personal UDOs. In order for an end user to continue to work on their personal UDOs, they must be added to their default project.	For Release 9.2, Grid Formats are now a UDO. This job runs for the environment that you are logged into. The OMW tables are System tables and are therefore shared across environments.
R8931CTSX	To convert CTS1, CTS2, CTS3, and CTS9 (collectively referred to as CTSx) data item values from 2 display decimals to match the display decimals of the TRQT data item (4 decimals).	You must run this program to increase the decimal precision of the CTSx data items if you use these data items to store unaccounted units.	The R8931CTSX table conversion program retrieves the TRQT data dictionary display decimals and converts the values of the CTSx data items in all affected tables to match the TRQT display decimals. The R8931CTSX program calls the Data Decimal Conversion business function (B8900010) for each CTSx data item. The UBE locates all tables containing the data item and selects non-zero values for conversion. The program converts the CTSx value and updates the table.	The default setting of the CTSx data items to 2 display decimals may cause rounding discrepancies. Therefore, Oracle recommends that you run this table conversion program to increase the decimal precision of the CTSx data items. After running the R8931CTSX program, change the display decimal setting of the CTSx data items in the E920 data dictionary to 4 to match the display decimal setting of the TRQT data item. For more information, refer to the Data Conversion Updates for Decimal Precision of Unaccounted Units document (2438553.1) on My Oracle Support: *https://support.oracle.com/epmos/faces/*

Upgrading from 9.1 or Below				
Conversion Program	**Run this Job**	**Requirements**	**Purpose**	**Notes**
				DocumentDisplay?id=2438553.1

Processing Options for R31P40039

This table lists all the processing options required for the R31P40039 program.

Processing Options for R31P40039	
Mode	Blank = Final (can be rerun). 1 = Proof. Does not change anything in the database.
Manufacturing	
Order Type value 01 for Manufacturing Orders	The user-defined code that the user wants to replace Order Type value 01 in the manufacturing orders. If no value is entered, the default order type assigned is 01.
Order Type value 02 for Manufacturing Orders	The user-defined code that the user wants to replace Order Type value 02 in the manufacturing orders. If no value is entered, the default order type assigned is 01.
Order Type value 03 for Manufacturing Orders	The user-defined code that the user wants to replace Order Type value 03 in the manufacturing orders. If no value is entered, the default order type assigned is 01.
Order Type value 04 for Manufacturing Orders	The user-defined code that the user wants to replace Order Type value 04 in the manufacturing orders. If no value is entered, the default order type assigned is 01.
Order Type value 05 for Manufacturing Orders	The user-defined code that the user wants to replace Order Type value 05 in the manufacturing orders. If no value is entered, the default order type assigned is 01.
Manufacturing Rework	
Order Type value 01 for Engineering Change Request Orders	The user-defined code that the user wants to replace Order Type value 01 in the engineering change request orders. If no value is entered, the default order type assigned is 01.
Order Type value 02 for Engineering Change Request Orders	The user-defined code that the user wants to replace Order Type value 02 in the engineering change request orders. If no value is entered, the default order type assigned is 01.
Order Type value 03 for Engineering Change Request Orders	The user-defined code that the user wants to replace Order Type value 03 in the engineering change request orders. If no value is entered, the default order type assigned is 01.

Processing Options for R31P40039	
Order Type value 04 for Engineering Change Request Orders	The user-defined code that the user wants to replace Order Type value 04 in the engineering change request orders. If no value is entered, the default order type assigned is 01.
Order Type value 05 for Engineering Change Request Orders	The user-defined code that the user wants to replace Order Type value 05 in the engineering change request orders. If no value is entered, the default order type assigned is 01.
Equipment	
Order Type value 01 for Equipment Orders	The user-defined code that the user wants to replace Order Type value 01 in the equipment orders. If no value is entered, the default order type assigned is 01.
Order Type value 02 for Equipment Orders	The user-defined code that the user wants to replace Order Type value 02 in the equipment orders. If no value is entered, the default order type assigned is 01.
Order Type value 03 for Equipment Orders	The user-defined code that the user wants to replace Order Type value 03 in the equipment orders. If no value is entered, the default order type assigned is 01.
Order Type value 04 for Equipment Orders	The user-defined code that the user wants to replace Order Type value 04 in the equipment orders. If no value is entered, the default order type assigned is 01.
Order Type value 05 for Equipment Orders	The user-defined code that the user wants to replace Order Type value 05 in the equipment orders. If no value is entered, the default order type assigned is 01.
S\WM	
Order Type value 01 for Service Orders	The user-defined code that the user wants to replace Order Type value 01 in the service orders. If no value is entered, the default order type assigned is 01.
Order Type value 02 for Service Orders	The user-defined code that the user wants to replace Order Type value 02 in the service orders. If no value is entered, the default order type assigned is 01.
Order Type value 03 for Service Orders	The user-defined code that the user wants to replace Order Type value 03 in the service orders. If no value is entered, the default order type assigned is 01.
Order Type value 04 for Service Orders	The user-defined code that the user wants to replace Order Type value 04 in the service orders. If no value is entered, the default order type assigned is 01.
Order Type value 05 for Service Orders	The user-defined code that the user wants to replace Order Type value 05 in the service orders. If no value is entered, the default order type assigned is 01.
Warranty Claim	
Order Type value 01 for Warranty Claim Orders.	The user-defined code that the user wants to replace Order Type value 01 in the warranty claim orders. If no value is entered, the default order type assigned is 01.

Processing Options for R31P40039	
Order Type value 02 for Warranty Claim Orders.	The user-defined code that the user wants to replace Order Type value 02 in the warranty claim orders. If no value is entered, the default order type assigned is 01.
Order Type value 03 for Warranty Claim Orders.	The user-defined code that the user wants to replace Order Type value 03 in the warranty claim orders. If no value is entered, the default order type assigned is 01.
Order Type value 04 for Warranty Claim Orders.	The user-defined code that the user wants to replace Order Type value 04 in the warranty claim orders. If no value is entered, the default order type assigned is 01.
Order Type value 05 for Warranty Claim Orders.	The user-defined code that the user wants to replace Order Type value 05 in the warranty claim orders. If no value is entered, the default order type assigned is 01.
Supplier Recovery	
Order Type value 01 for Supplier Recovery Orders	The user-defined code that the user wants to replace Order Type value 01 in the supplier recovery orders. If no value is entered, the default order type assigned is 01.
Order Type value 02 for Supplier Recovery Orders	The user-defined code that the user wants to replace Order Type value 02 in the supplier recovery orders. If no value is entered, the default order type assigned is 01.
Order Type value 03 for Supplier Recovery Orders	The user-defined code that the user wants to replace Order Type value 03 in the supplier recovery orders. If no value is entered, the default order type assigned is 01.
Order Type value 04 for Supplier Recovery Orders	The user-defined code that the user wants to replace Order Type value 04 in the supplier recovery orders. If no value is entered, the default order type assigned is 01.
Order Type value 05 for Supplier Recovery Orders	The user-defined code that the user wants to replace Order Type value 05 in the supplier recovery orders. If no value is entered, the default order type assigned is 01.
ECO	
Order Type value 01 for Engineering Change Orders	The user-defined code that the user wants to replace Order Type value 01 in the engineering change orders. If no value is entered, the default order type assigned is 01.
Order Type value 02 for Engineering Change Orders	The user-defined code that the user wants to replace Order Type value 02 in the engineering change orders. If no value is entered, the default order type assigned is 01.
Order Type value 03 for Engineering Change Orders	The user-defined code that the user wants to replace Order Type value 03 in the engineering change orders. If no value is entered, the default order type assigned is 01.
Order Type value 04 for Engineering Change Orders	The user-defined code that the user wants to replace Order Type value 04 in the engineering change orders. If no value is entered, the default order type assigned is 01.
Order Type value 05 for Engineering Change Orders	The user-defined code that the user wants to replace Order Type value 05 in the engineering change orders. If no value is entered, the default order type assigned is 01.

Processing Options for R31P40039	
ECO Request	
Order Type value 01 for Engineering Change Request Orders	The user-defined code that the user wants to replace Order Type value 01 in the engineering change request orders. If no value is entered, the default order type assigned is 01.
Order Type value 02 for Engineering Change Request Orders	The user-defined code that the user wants to replace Order Type value 02 in the engineering change request orders. If no value is entered, the default order type assigned is 01.
Order Type value 03 for Engineering Change Request Orders	The user-defined code that the user wants to replace Order Type value 03 in the engineering change request orders. If no value is entered, the default order type assigned is 01.
Order Type value 04 for Engineering Change Request Orders	The user-defined code that the user wants to replace Order Type value 04 in the engineering change request orders. If no value is entered, the default order type assigned is 01.
Order Type value 05 for Engineering Change Request Orders	The user-defined code that the user wants to replace Order Type value 05 in the engineering change request orders. If no value is entered, the default order type assigned is 01.
Real Estate Management	
Order Type value 01 for Real Estate Management Orders	The user-defined code that the user wants to replace Order Type value 01 in the real estate management orders. If no value is entered, the default order type assigned is 01.
Order Type value 02 for Real Estate Management Orders	The user-defined code that the user wants to replace Order Type value 02 in the real estate management orders. If no value is entered, the default order type assigned is 01.
Order Type value 03 for Real Estate Management Orders	The user-defined code that the user wants to replace Order Type value 03 in the real estate management orders. If no value is entered, the default order type assigned is 01.
Order Type value 04 for Real Estate Management Orders	The user-defined code that the user wants to replace Order Type value 04 in the real estate management orders. If no value is entered, the default order type assigned is 01.
Order Type value 05 for Real Estate Management Orders	The user-defined code that the user wants to replace Order Type value 05 in the real estate management orders. If no value is entered, the default order type assigned is 01.
Rate Schedules	
Order Type value 01 for Rate Schedule Orders	The user-defined code that the user wants to replace Order Type value 01 in the rate schedule orders. If no value is entered, the default order type assigned is 01.
Order Type value 02 for Rate Schedule Orders	The user-defined code that the user wants to replace Order Type value 02 in the rate schedule orders. If no value is entered, the default order type assigned is 01.

Processing Options for R31P40039	
Order Type value 03 for Rate Schedule Orders	The user-defined code that the user wants to replace Order Type value 03 in the rate schedule orders. If no value is entered, the default order type assigned is 01.
Order Type value 04 for Rate Schedule Orders	The user-defined code that the user wants to replace Order Type value 04 in the rate schedule orders. If no value is entered, the default order type assigned is 01.
Order Type value 05 for Rate Schedule Orders	The user-defined code that the user wants to replace Order Type value 05 in the rate schedule orders. If no value is entered, the default order type assigned is 01.
EPM Order Summary	
Order Type value 01 for EPM SummaryOrders	The user-defined code that the user wants to replace Order Type value 01 in the EPM summary orders. If no value is entered, the default order type assigned is 01.
Order Type value 02 for EPM Summary Orders	The user-defined code that the user wants to replace Order Type value 02 in the EPM summary orders. If no value is entered, the default order type assigned is 01.
Order Type value 03 for EPM Summary Orders	The user-defined code that the user wants to replace Order Type value 03 in the EPM summary orders. If no value is entered, the default order type assigned is 01.
Order Type value 04 for EPM Summary Orders	The user-defined code that the user wants to replace Order Type value 04 in the EPM summary orders. If no value is entered, the default order type assigned is 01.
Order Type value 05 for EPM Summary Orders	The user-defined code that the user wants to replace Order Type value 05 in the EPM summary orders. If no value is entered, the default order type assigned is 01.

12 Building and Testing Packages

Understanding Packages

Building and testing packages provides a method to create a package, to define and build a package, to deploy packages to both servers and Development Clients, and to troubleshoot the packages. These features use a step-by-step director process and include package assembly, package build, and package deployment.

Package build is used to set up a Development Client or server with *Release 9.2* software. Examples scenarios include:

- Setting up a new Development Client
- Deploying custom solutions to all or to selected users
- Creating a new pathcode for development
- Deploying a fix
- Changing the package from a full to a partial package on some Development Clients

There are options to define three different package types, to build and define packages with custom solutions, and to distribute them through two different deployment options. These options are available to a single server, to a Development Client or user, or to selected machines, groups, or individual users. These options can be delivered using just-in-time or scheduled installation methods.

You must define, build, and deploy a custom package in order to include any modifications (changed or added business functions or applications) into a package for deployment to Development Clients (for example, DV920FA or DV920PA).

The system administrator is required to build and test packages at the server level. An installer may complete the process for the Development Clients. These processes can take several hours, depending on the scope of your business. The procedures take place on the Deployment Server in the deployment environment as user JDE. *Release 9.2* installation must be completed on the Enterprise Server before building and testing packages. The time required to build packages to the Development Client varies depending on the database being used.

The package build and assembly process includes many critical tasks that must be successfully completed to install the packages correctly. This section includes a list of known issues associated with the package build, assembly, and deployment process and gives instructions for avoiding them. Before building a package, review these instructions to successfully complete this process.

See Also

Package Build in the *JD Edwards EnterpriseOne Tools Package Management Guide* for information about how to build and deploy packages.

JD Edwards EnterpriseOne Tools Development Standards for Business Function Programming Guide for information on how to convert business functions to support Unicode text strings.

Obtaining the JDK or JRE

You must have a specific JDK or JRE on the Deployment Server in order to build packages. You can obtain the requisite JDK or JRE from Oracle E-Delivery.

See Also

For the supported version of the JDK or JRE, refer to *Accessing Certifications* in the chapter entitled: *Understanding JD Edwards EnterpriseOne* of this guide.

Installing Application Fixes

Before you build packages, you should install all application fixes relevant to your business. Application fixes include maintenance packs, ESU bundles, and individual fixes. You should use Change Assistant to find relevant application fixes for system codes associated with the functionality you are using.

Change Assistant is a java-based tool that centralizes and economizes the process of searching, identifying, downloading, and deploying many types of software fixes such as ESUs and Tools Releases. It is available free of charge for maintenance paying customers, and can be downloaded from the Update Center.

Tests conducted in the Oracle labs on EnterpriseOne have shown that the use of this tool results in a significant reduction in elapsed time as well as a considerable reduction in manual steps - when compared to current search, download, and deploy processes.

For instructions on using Change Assistant, refer to *Using the Change Assistant* in the *JD Edwards EnterpriseOne Software Update Guide.*

Reviewing Pre-Package Build Issues

Check the following items before building packages in order to minimize errors during package builds. Perform each of the relevant tasks on the machine where the package will be built.

This section discusses:

- *Verifying Available Space in DBMS*
- *Verifying Specific UBEs are Mapped Locally*
- *Verifying the Server-Side Settings*
- *Configuring the Enterprise Server for Simultaneous Builds*
- *Adding a Security Override for Running Package Build*
- *Verifying UNICODE Settings When Upgrading From Xe*

Verifying Available Space in DBMS

Package Deployment will copy the Central Objects tables in your server database to a new set of Metadata Specifications tables in the same database.

Verify there is enough free disk space for this extra copy.

Note the space used by your Central Objects tables and their indexes. The new set of Metadata Specifications tables will use additional space approximately the same size (for a full package) as your current Central Objects tables plus indexes. Those tables are:

- F98306
- F98710
- F98711
- F98712
- F98713
- F98720
- F98740
- F98741
- F98743
- F98745
- F98750
- F98751
- F98752
- F98753
- F98760
- F98761
- F98762

If you do not have enough free space to accommodate these tables, you must free up some disk space or drop the metadata specifications tables for old packages no longer in use.

If you do not have enough free space to accommodate these tables, you must free up some disk space or drop the metadata specifications tables for old packages no longer in use.

Verifying Specific UBEs are Mapped Locally

To verify that specific UBEs are mapped locally:

1. Open the Object Configuration Manager (OCM).
2. Find each of the following UBEs and make sure each is mapped locally and is active: R9621, R9622, R98825C, and R98825D.

Verifying the Server-Side Settings

To verify the `jde.ini` settings on the Enterprise Server:

1. Open the `jde.ini` on the Enterprise Server.
2. Verify that the BuildArea setting in the [BSFN BUILD] section points to the PACKAGES directory on the Enterprise Server.

   Verify that the following LinkFlags settings are correct:

- Ensure that the path to the system\bin32 directory on the Enterprise Server is valid.
- Ensure that LinkFlags references the path where *Release 9.2* is installed.

Configuring the Enterprise Server for Simultaneous Builds

To ensure that simultaneous builds run properly on your Enterprise Server.

1. Open the `jde.ini` on the Enterprise Server.
2. In the [BSFN BUILD] section, change the SimultaneousBuilds setting to 5 or less (the default is zero, which enables unlimited builds)

Adding a Security Override for Running Package Build

The Package Build process creates tables due to the requirement for metadata. Therefore, you must manually set up security overrides for any user who will be doing the package build. For details on adding a security override for running packages, refer to the chapter in this guide entitled: *Performing Post Installation and Upgrade Tasks* in the section entitled: *Working With Signon Security and Table Creation Security* in the subsection entitled: *Adding a Security Override for Running Package Build*.

See Also

Refer to the *JD Edwards EnterpriseOne Tools Package Management Guide* in the appendix entitled: *Appendix A, Adding a Security Override for Package Build* for further details on setting up security overrides for package build.

Verifying UNICODE Settings When Upgrading From Xe

If you are upgrading from Xe and you have modified any applications or UBEs with NERs and which are language-enabled, you must ensure this setting is in your `jde.ini` of the build machine on which you build the NERs, and also on the Deployment Server on which you are running the upgrade processes:

```
[INSTALL]
Unicode Conversion Codepage=code_page_value
```

where *code_page_value* is a valid value for the code page of the language-enabled application with NERs. For example, for Korean language the value would be:

```
[INSTALL]
Unicode Conversion Codepage=ksc-5601
```

> **Note:** If you are a language customer but have never added NER to your applications, then you are not required to have this setting. Also note that the `LocalCodeSet=` value is no longer used in releases subsequent to Xe.

Reviewing Troubleshooting Tips

The following troubleshooting tips are designed to help avoid known issues with the package build, assembly, and deployment process. Review these tips when working through the process.

- When naming your packages, do *not* use these names:
  - CLIENT
  - SERVER
- Verify the assemble and build processes completed.

  After entering the package information on both the Assembly and Build forms, click the End icon to save the information.
- Verify setting on the package definition screen.

  When selecting servers on the Build Definition form, ensure that a check mark appears next to each server selected. If no check mark appears, highlight the server in the grid and click Select.
- Recompress the parent packages.

  After building an update package that updates the parent package, you must recompress the parent package. This step does not occur automatically.
- Verify the location of server packages.

  When building an update server package, the specified parent package must be stored under the package directory on the server. If the parent package is not under the package directory, the update package does not build.

Building an Alternate Language Package

A package represents a copy of the central objects at a point in time. It contains replicated objects that *Release 9.2* reads at run-time. If custom modifications or text overrides have been made at the time that a software upgrade is performed or to deploy development changes, including a specific language, to a local Development Client, build a package, and specify which language or languages to include in that package. This action involves the following considerations:

- *Package Build Considerations*
- *Package Deployment Considerations*

Package Build Considerations

Before beginning to build a language package, verify that the language installation is complete. To build the language package, first define the package. Building the package can take several hours, depending on the size of the package and the number of languages used. This task is completed on the Deployment Server, logged on as user JDE in *DEP920* .

To include language specifications in your package, specify the language in the package definition. The package build process then uses the language preference code. This code is specified as a parameter when building the package. It uses the relational database tables to build the form design aid text and report design aid text specifications. A language package can be a full, update, or partial package.

CAUTION: When building the client package with translated processing option text, run the build using Microsoft Windows with the system locale set to the appropriate language. If the system locale on the operating system does not match the installed language, the translated text in processing options (POTEXT) will be corrupted.

Building server packages that include languages other than English requires that the LocalCodeSet value of the *Release 9.2* client matches the LocalCodeSet value of the `jde.ini` on the Enterprise Server. If the LocalCodeSet value on the local client differs from the one specified on the Enterprise Server, the server package build fails and errors are logged in the `jde.log` on the Enterprise Server.

Package Deployment Considerations

A translated package cannot be deployed to a Development Client if the appropriate character set is not installed on that Development Client. For example, if creating a package containing Japanese text, the Development Client must be loaded with Japanese Microsoft Windows to view the Japanese data correctly.

CAUTION: To transfer translated objects to a server, complete the server package installation procedures. Define each object you have modified for languages. Therefore, track the objects you changed to include them in a package.

Note: To move all objects, call Global Customer Support for assistance.

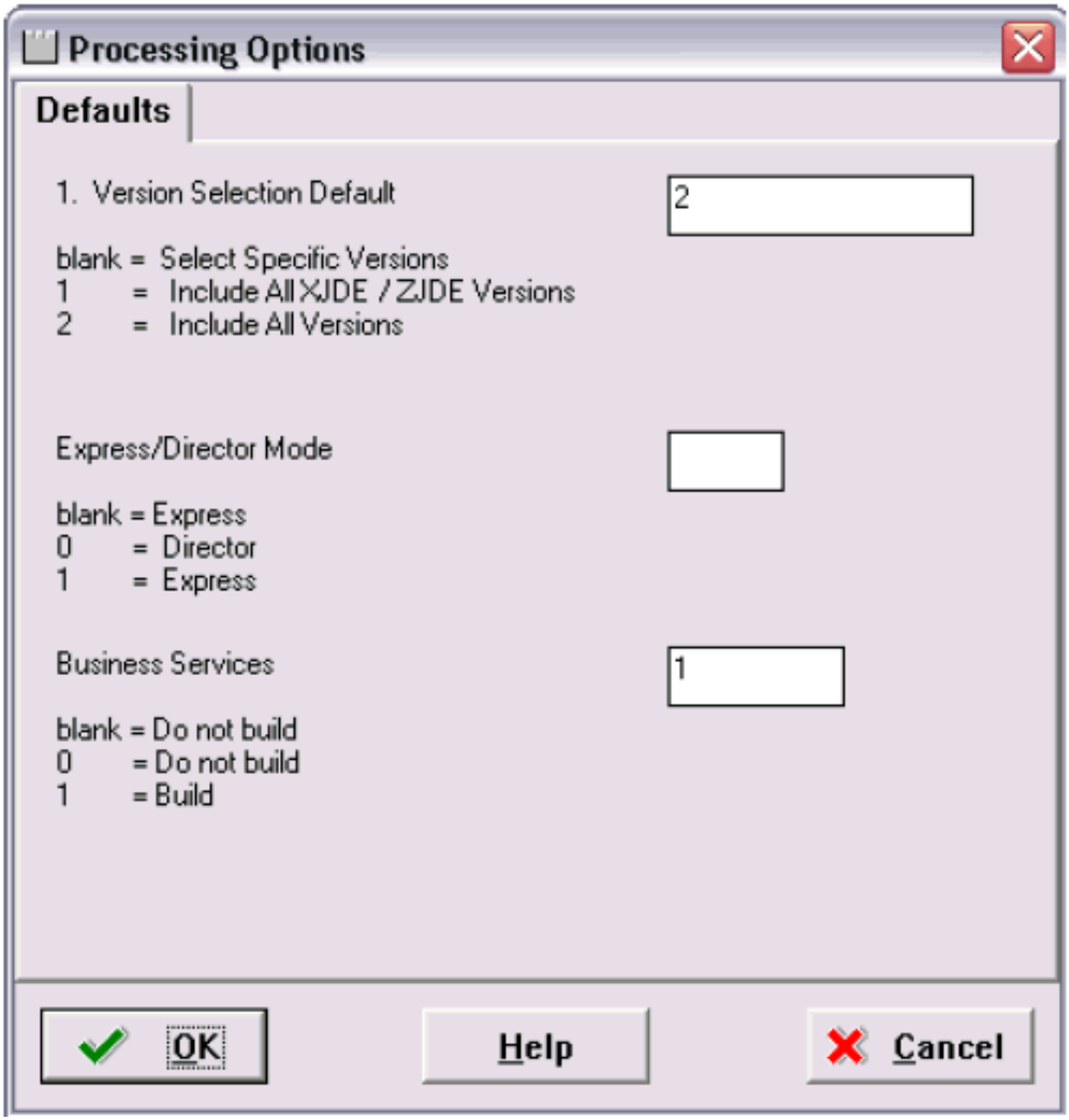
See Also

JD Edwards EnterpriseOne Tools Package Management Guide for more information about transferring objects to the server.

Assembling a Package that Contains Published Business Services

To assemble a Business Services package:

1. Navigate to the processing options for Package Assembly from to the Package and Deployment Tools menu by right-clicking the Package Assembly application (P9601), and selecting prompt for values.



2. Set the processing option entitled Business Services to a value of *1*.

   Note: This processing option is blank by default.

3. Click OK.

See Also

- To begin the assembly process, refer to the chapter entitled *Assembling Packages* in the *JD Edwards EnterpriseOne Package Management Guide*.

- *Building a Package with Published Business Services* in the *JD Edwards EnterpriseOne Package Management Guide*.
- *Deploying the Package to the Business Services Server* in the *JD Edwards EnterpriseOne Package Management Guide*.

13 Upgrading the Production Environment

Understanding the Upgrade of the Production Environment

Use this procedure after all testing has been successfully completed. This procedure brings your live production environment from the previous release to the newly upgraded release, which in this document is *Release 9.2* .

In a normal upgrade, there is an upgrade environment, such as development or CRP\PY, and then there is the live environment such as production. During the first phase of an upgrade, all modifications and customizations that are to be kept for the new release are transferred into the upgrade environment. The upgrade then converts the central objects with the table conversions and specification merge, business data table conversions, and control table merges. Once this upgrade is successfully tested, the production environment is ready to be brought up.

The new production environment borrows the already successfully merged central objects containing all your mods and customizations, and can borrow the successfully merged control tables as well. This leaves the business data table conversions as the only merge or conversion that needs to be run in order for Production to be successfully prepared. However, if you decide not to copy the control tables from the PY to the PD, then you will have to rerun the control table merge.

> **Note:** You cannot use the procedures in this section if you need to bring any additional object specification changes. This is a distinguishing factor between a complete system upgrade and an update the to the production environment upgrade.

For *Release 9.2* on the Deployment Server, Security Server should be turned off during the workbench. The may be security issues if you are using Signon Security during the workbench. There may be password issues when there is not a database sign in as JDE with password JDE.

During both the Upgrade and the Update of the production environment, the workbench begins with the Initial Tasks. The initial tasks runs four reports explained below. However, since these reports have been previously run during the initial upgrade, the Batch Application will run, but do not copy over any data by default. Alternatives to the way these run by default are discussed below the Batch explanations.

Normally after you have upgraded all other environments, you upgrade the live production environment. This chapter explains how to upgrade the production environment with a minimum amount of production downtime.

Before proceeding:

- Apply Planner Update to *PS920* and *PY920*
- Build and deploy full server package to *PS920* and *PY920*
- Test all custom modifications in *PY920*

During the first phase of an upgrade, all modifications and customizations are transferred into the upgrade environment. The upgrade then converts the central objects with the table conversions and specification merge, business data table conversions, and control table merges. Once the upgrade is successfully tested, the production environment is ready to be brought up. The new production environment will borrow the already successfully merged Central Objects containing all your modifications and customizations, and can borrow the successfully merged Control Tables as well.

The Production Upgrade only converts business data. All shared data, system data, control tables, etc. needs to be converted. Objects and version are copied from the *PY920* environment. Then, the Business Data Table conversions is the only merge or conversion that needs to be run in order for Production to be successfully prepared. However, if you opt not to copy the Control Tables from the PY to the PD, then you will have to run the Control Table Merge again.

You cannot use the Updating the Production Environment section if you need to bring any additional object specification changes. This is a distinguishing factor between an upgrade and an update of the production environment.

General Checklist and Considerations

You should review this section prior to beginning an upgrade to the production environment.

- Copying Central Objects, Object Librarian, and Packages
  You can copy Business Data, Control Tables, Central Objects from PY920 to PD920 using UBE R98403:
  XJDE0019 to copy Central Objects
  XJDE0021 to copy Business Data
  XJDE0022 to copy Control Tables
  Alternately, you can run SAVLIB for these libraries:
  - CRPDTA
  - CRPCTL
  - COPY920

  Then restore the above libraries respectively as:
  - PRODDTA
  - PRODCTL
  - COPD920
- Copy ESU History
  Run R9672 to copy ESU history. Be sure to change the Processing Options appropriately.
  Run R989861 to copy the Object Librarian Check-in records.
- Signon security
  You should turn off the Security Server when you are running the Installation Workbench. Otherwise, security issues may occur while the Installation Workbench is running. If you have changed the password for JDE in your Enterprise Server database on your *IBM i* you should sign into the Deployment Server using the correct password for the Enterprise Server. For example, JDE APPLES JDEPLAN. You should add any passwords that have changed since the initial install and which might be used during the upgrade process to the **JDE.INI** on the Deployment Server in the **[DSPWD]** section. For example:

  ```
  [DSPWD]
  JDE=APPLES
  ```

```
PRODDTA=SNOOPY
```

- Initial Tasks Workbench

  Most of the processes in the Initial Tasks Workbench will be marked as Duplicates and will not run again. The Release Master (B9800400) runs every time. If you are upgrading from Xe or ERP8, you will need to run the Media Objects conversion for your business data. You should edit the Upgrade plan to change the status of R8900165 to 30. When the workbench runs, it presents a confirmation window telling you this conversion has already run. You should click Cancel to force the process to run the conversion.

- Control Table Merge

  If you copied the Control Tables in the Environment Copy application, in that application you should modify the Advanced options for your environment to uncheck the Control Table Merges. If you already finalized the plan, you will need to re-finalize the plan for this change to take effect. Alternatively you can mark all the Control Table Merges as having run by changing their status to 60.

  The Upgrade plan will schedule the Table Conversions for your production data.

- Specifications Merge

  By default the Installation Planner will not schedule a Specifications Merge for your PD Upgrade plan. If you are upgrading any other environment, and have copied your Central Objects during Environment Copy, you should set the status of the Specifications Merge to 60 before running the Workbench.

- Log all *JD Edwards EnterpriseOne* users off

  Ensure that all *JD Edwards EnterpriseOne* users are logged off when running the Installation Workbench for the production upgrade.

Setting Up an Upgrade Plan for the Production Environment

Your goal should be to set up a plan similar to the plan used to upgrade the other environments. However, note that some exceptions might be given in this task. Remember that production should be the only environment being upgraded at this time because upgrading other environments at the same time increases downtime.

To set up an upgrade plan for the production environment, perform the all the normal tasks associated with an initial installation with differences as listed in this table:

Task	Difference
Entering a Plan Description	Press OK to enter the plan information manually.
Entering Location Information	Click Select to enter location information for an existing Location. On the next resulting dialog, select the Location and click OK.
Entering Deployment Server Information	Click Select to enter deployment server information for an existing Deployment Server if you are not changing servers.

Task	Difference
Entering Enterprise Server Information	Click Select to if you are not changing servers. If you are changing servers, click Add your add a new server.
Entering Enterprise Server Data Source Information	Select the default value, and verify the data sources if you are adding a new Enterprise Server into your plan.
Defining Machine\Server Types	Keep all of these options turned off. These machines are defined in the initial installation plan.
Entering Shared Data Source Information	If you are using recommendations, accept the default values; otherwise, you should modify to fit your specific installation values.
Setting Up Environments	Turn on the options for Default Environments Data Load and Advanced Options.
Selecting an Environment	Select the pathcode that you want installed on the Deployment Server from the Deployment Server disk (for missing environments on this form).
Specifying Environment Data Load Parameters	Enable the Load Production Data option, and click OK.
Verifying Advanced Parameters	Select the following: • Upgrade Environment. • PD7333 or PD7334 as Previous Environment. • Check Table Conversions. • Clear Specification Merge. • Enable Control Table Merge if you need to bring over specific control tables.
Setting Up Environment Data Sources	Click OK for manual set up if you want to set up data sources except for these: Control Tables - Prod, Versions - PD920, Central Objects - PD920,Business Data - PROD.
Adding a Remote Location	Skip this section.

After you run the Installation Planner with these settings, click OK at the congratulations screen to obtain a report. Review each section of the Planner Validation report and check for any of these potential error conditions:

- Duplicate Entry is the result of conversions that have run previously on Data Dictionary and System Tables. You can safely disregard these duplicate entries.
- Source and Target data source entries must be identical, and all must read as Business Data - PROD. You should remove conversions for the Central Objects or System data sources if they are present.
- Control Table Merge displays the control tables you have chosen to run. The remaining Control Table merges are for Solution Explorer, UDCs, and other Control Tables.

Taking the Production Environment Offline

Take the production environment offline before continuing.

Running the Installation Plan for the Production Environment

> **CAUTION:** The production environment must be unavailable during this task. All users must be logged off the production environment, and no production processes can run during this time.

After you have created a plan for the production environment, as well as having copied all the necessary components from the prototype environment, you are ready to run the plan using Installation Workbench. During Installation Workbench, run Table Conversion Workbench and Control Table Workbench. These processes preserve and merge the business data and control tables from your production environment.

To run the Installation Plan for the production environment:

1. Take the production environment offline.
2. Log on to the planner environment.
3. On **Installation Workbench**, double-click the installation plan you created for the production environment.
4. Perform the tasks in the Installation Workbench section.

Testing the Production Package

The next step in upgrading production is testing your modifications on the Development Client where you should surface test the *Release 9.2* production environment. After you finish testing the environment, you can deploy it to other Development Clients.

Bringing the Production Environment Online

The final step in upgrading the production environment is to bring the production environment online.

14 Retrofitting Custom Modifications

Overview

When upgrading to a new release, you might need to retrofit some of your modifications to the new release. Because it is a laborious process to recreate custom modifications each time you upgrade the software, the upgrade process preserves most of your custom modifications. This chapter explains how to integrate any custom modifications that the upgrade process did not preserve into your new *Release 9.2* software. This integration, called retrofitting, enables refitting of your customizations that could not be merged into the new version of the software.

Retrofitting modifications only needs a Development Client with the upgraded software and the development tools provided with *Release 9.2* . These tools compare the customizations that *Release 9.2* merged into the new software with any pathcode in the system. Thus, you can easily compare your upgraded modifications with a version of your modifications before the upgrade or with the pristine environment of the new release.

> **Note:** The ability to carry forward the deletion of standard *JD Edwards EnterpriseOne* text overrides is not a supported custom modification. That is, if a text override is deleted by a customer it is re-deployed with the next ESU or upgrade. The original static text control should be hidden. A new control with the desired text should be added in its place.

Retrofitting Custom Modifications

To retrofit custom modifications:

1. From the Development Client on which you will retrofit the object modifications, check out the modified objects.

   To check out objects, see *JD Edwards EnterpriseOne Tools Object Management Workbench for the Web Guide.*

   `http://docs.oracle.com/cd/E24705_01/doc.91/e24255/toc.htm`
2. Use the ER Compare utility to compare the upgraded version of the object on the client machine to a version of the object as it was before the upgrade.

   This tool enables the direct copy of event rules from the original specifications to the upgraded specifications. See the section of the *JD Edwards EnterpriseOne Tools Software Updates Guide* entitled: *JD Edwards EnterpriseOne ER Compare* for more information about this procedure.

   `http://docs.oracle.com/cd/E24705_01/doc.91/e24260/compare_tools.htm#BABDEDHF`
3. Use the other design tools described in the JD Edwards EnterpriseOne Development Tools Guides to retrofit other modified components of objects.
4. Use ER Compare to show the difference in named event rule (NER) business function source codes.
5. Redo any custom event rules for Do Initialize events because they have been removed from the UBE event list.
6. When you have tested and retrofitted the modifications, check them back in and rebuild the package.
7. Test and fix the modifications, and then rebuild and re-deploy the corrected package.

   Repeat this step until all the modifications are functioning properly.

Using JD Edwards Compare and Merge Tools

The chapter entitled: *Using JD Edwards Compare and Merge Tools* in the *JD Edwards EnterpriseOne Software Updates Guide* fully describes all of the tools that have been created to help you compare between releases as well as with environments on the same release.

See Also

- *JD Edwards EnterpriseOne Software Updates Guide*

  `http://docs.oracle.com/cd/E24705_01/doc.91/e24260/toc.htm`

The following sections in this guide provide a high-level description of the compare and merge tools:

- *Using the Application Configuration Analyzer*
- *Using the Customization Object Analyzer*
- *JD Edwards Visual Compare for UDC Descriptions and Glossary Tool*
- *JD Edwards EnterpriseOne FDA Compare*
- *JD Edwards EnterpriseOne ER Compare*

Using the Application Configuration Analyzer

The Application Configuration Analyzer is a set of reports which identify differences for processing options, data dictionary (DD) items, and user defined codes (UDCs) between releases or environments. These reports are:

- Versions Compare Report
- User Defined Codes Compare Report
- Data Dictionary Compare Report

If you have made custom modifications to business data, these reports can help you verify that your modifications were carried forward to the new release. You can use these tools anytime you want to compare items between two environments.

See Also

- The section entitled: *Application Configuration Analyzer* in the *JD Edwards EnterpriseOne Software Updates Guide* .

  `http://docs.oracle.com/cd/E24705_01/doc.91/e24260/compare_tools.htm#BABEHIBI`

Using the Customization Object Analyzer

If you are on an older release of JD Edwards EnterpriseOne, you need to identify customizations in order to determine the impact and level of effort to retrofit the customizations into the newer release of JD Edwards EnterpriseOne. This utility helps to identify the customizations in order to determine the impact and level of effort to retrofit the customizations into the newer release of JD Edwards EnterpriseOne. A review of this information, prior to performing modifications within the software, will allow for a smoother and more predictable upgrade of the EnterpriseOne software.

The Customization Object Analyzer is comprised of a UBE that loads a table and UBEs that read from that table to create either a summary or detailed report. The UBEs are:

- **R9840DL (Object Dataload)**

  This UBE loads the F98881CU table in a parent-child hierarchy of object changes with a list of all JD Edwards EnterpriseOne customized objects.

- **RD9840RS (Object Customization Summary Report - BI Publisher)**

  This UBE creates a summary report from the data in the F98881CU table.

- **RD9840RD (Object Customization Detail Report - BI Publisher)**

  This UBE creates a detail report from data in the F98881CU table that shows the details of the customizations grouped by various criteria.

- **R9840R (Object Customization Summary and Detail Report - Standard Version)**

  This UBE creates a summary and detail report from the data in the F98881CU table.

See Also

- The section entitled *Customization Object Analyzer* in the *JD Edwards EnterpriseOne Tools Software Updates Guide* .

  `http://docs.oracle.com/cd/E24705_01/doc.91/e24260/compare_tools.htm#CHDFHBHB`

JD Edwards Visual Compare for UDC Descriptions and Glossary Tool

JD Edwards EnterpriseOne Visual Compare for UDC Descriptions and Glossary tool (P96472) enables you to review and apply text updates for Data Dictionary glossaries and UDCs. You can see a side-by-side comparison of the new and old text values, which enables you to choose whether to accept the changes.

The Visual Compare for UDC Descriptions and Glossary Tool, application P96472, is run from an administrative Development Client within JD Edwards EnterpriseOne and applies the changes to the current environment.

See Also

- The section entitled *JD Edwards Visual Compare for UDC Descriptions and Glossary Tool* in the *JD Edwards EnterpriseOne Tools Software Updates Guide* .

  `http://docs.oracle.com/cd/E24705_01/doc.91/e24260/compare_tools.htm#BABJCAED`

JD Edwards EnterpriseOne FDA Compare

The FDA Compare tool in Oracle's JD Edwards EnterpriseOne Form Design Aid (FDA) enables you to compare one version of an application to another. You can compare them on the application level to determine whether forms have been added, deleted, or rearranged and whether the properties have changed. You also can compare the forms in the applications to each other to see whether controls have been added, deleted, or rearranged and whether the properties have changed.

Additionally, you can compare two different applications as well. This feature is useful when you have made a new application by copying an existing one and then modifying it. Then, when you upgrade, you can not only compare the base application to its new counterpart, but also you can compare a custom application.

While working with the target object, you can use all FDA functions except creating new forms. While comparing, you can change the target object to match the source object. If an object exists in the source but not in the target, you can copy it to the target. If an object exists in both but is different in some way, you can merge the specifications from the source to the target to make them identical.

As a software developer, you might use FDA Compare as the final step before checking in the changes to ensure that you made all of the changes you intended to make. In this way, you can also make sure that you did not move a control or make a property change unintentionally.

As an administrator, you might use FDA Compare to see the changes between a software update and the pristine or current implementation. If you have performed a number of customized modifications, you can more carefully implement the software changes without fear of ruining the customization.

See Also

- The section entitled *JD Edwards FDA Compare* in the *JD Edwards EnterpriseOne Tools Software Updates Guide* .

  http://docs.oracle.com/cd/E24705_01/doc.91/e24260/compare_tools.htm#BABBFJFF

JD Edwards EnterpriseOne ER Compare

JD Edwards ER Compare provides a detailed, on-screen comparison of event rules. You can change the target object (your local version) within the utility by moving lines directly from the source. You can also remove or disable lines. In addition to providing an on-screen comparison, you can select to print a report detailing the changes as well.

See Also

- The section entitled *JD Edwards ER Compare* in the *JD Edwards EnterpriseOne Tools Software Updates Guide* .

  http://docs.oracle.com/cd/E24705_01/doc.91/e24260/compare_tools.htm#BABJCAED

15 Troubleshooting

Using the PORTTEST Checklist

If the PORTTEST program fails to run, use this checklist to diagnose the problem before calling Global Customer Support. Please have the answers to these questions as well as copies of error messages, your Enterprise Server, and any error logs, such as JDE.log or JDE_xx.log.

PORTTEST may fail if replication, security server, or transaction processing have been installed incorrectly. If problems occur after the installation of one or more of these services, check the setup of those services for incorrect parameters.

PORTTEST will also fail if the Enterprise Server does not have an appropriate 32-bit database client installed. Refer to the chapter of this guide entitled: *Working With the Enterprise Server* in the section entitled: *Installing a 32-bit Database Client*.

Additionally, if PORTTEST reports warnings that indicate data dictionary or company constants are invalid, it may be because the F0010 table is empty. As is true with the full *JD Edwards EnterpriseOne* installation, this is a normal condition in Pristine and Production environments.

General Issues	Yes\No
Is the user logged on with administrator privileges?	
Is the JDENET Service starting with a network domain user?	
Is the JDENET Service account included in the local administrator group?	
Are all the environment variables set?	
Is the C compiler installed with Unicode module?	
Can you query the database on the Enterprise Server?	
Is a PostScript or PCL printer connected to this machine?	
Are the printer drivers for this printer installed?	
Is this printer configured as the default printer?	

***jde.ini* Issues**	**Yes\No**
Is your *jde.ini* located in the correct directory?	
Does your *jde.ini* have the correct permissions?	
Are the following *jde.ini* parameters set properly?	
[Network Queue Settings] Default Printer OUTQ=your printer	
[UBE] If you use PostScript, is the correct filter set up?	
[DB System Settings] Verify all parameters, especially the following: Default Env= your default environment Default Pathcode = your default path code Server = database server name	
[JDENET] serviceNameListen = port number serviceNameConnect = port number	
[INSTALL] *E920* =your path	

Communications Issues	**Yes\No**
Do the Development Clients and server agree on the IP address of the server?	

Other Issues	Yes\No
Were your server map tables (F98611 and F986101) edited properly?	
Run the Verify OCM application and verify:	
Do only host databases exist?	
No entries for batch applications exist.	
Are OneWorld tables accessible to the host?	
Can you query the F0902 table?	
Does PORTTEST run without error for each valid path code?	
Does the user name match that of a valid *Release 9.2* account? Remember that the user name is case sensitive.	
Is the password valid for the given *Release 9.2* account?	
Does the environment name match a valid *Release 9.2* environment? Remember that the environment name is case sensitive.	
Does JDENET start and stop properly?	

If you answered no to any of these questions, your batch application might not run. If you answered yes to all the questions, submit a batch application now.

If your batch application does not run correctly, turn on error logging and resubmit the batch. This log helps Global Customer Support diagnose the exact problem.

Resolving Data Errors

If you are receiving data warnings against the F0010 table in the Pristine or Production environments, the table might be empty. This is how it is delivered. You can ignore these warnings, load demo data, or load your own data.

Planner Update Special Instructions

The Electronic Software Update (ESU) for the Planner Update Special Instructions was created with special features that updates the Planner pathcode on the Deployment Server. It includes all fixes for *Release 9.2* installation and upgrade process.

You must run the **specialInstrs.bat** file to copy certain table records from the ESU database to the Planner databases on the Deployment server.

1. On the Deployment server, browse to this directory:

   \JDEdwards\ *920* \Planner\Package\JMxxxxxx\Scripts
2. Run the batch file **specialInstrs.bat**. Note any success or failure messages that appear in the command window.

   Review the **SpecialInstrs.log** file that is created in the same directory for details.

Resolving Errors Due to Lack of *ALLOBJ and *JOBCTL Authority

By default the Installation program grants *JOBCTL authority to the ONEWORLD user profile. You may have a temporary requirement to grant *ALLOBJ authority to ONEWORLD. This could be required if ONEWORLD needs to start journaling on a table but does not have OBJMGT rights to that table. For example, when submitting a UBE to the server for the first time, ONEWORLD needs to start journaling on F986111. Symptoms of this problem are errors indicating a transaction was cancelled because a commit cycle could not be start.

Of the multiple ways to grant the *ALLOBJ authority to ONEWORLD, the simplest is to give ONEWORLD rights to all tables using the SETOWAUT tool. Alternatively, you could run the GRTOBJAUT command to give ONEWORLD OBJMGT authority of to all tables in your business data, system, and server map libraries. Note that either method causes locks to be put on tables, which could interfere with other users on your system. In order to avoid that potential interference caused by locks, it may be preferable to temporarily grant *ALLOBJ authority to ONEWORLD, which you can revoke after a short while.

To grant *ALLOBJ authority, from a green screen enter the following command:

```
CHGUSRPRF USRPRF(ONEWORLD) SPCAUT(*ALLOBJ *JOBCTL) JOBD(*LIBL\ONEWORLD)
```

16 Performing a Data-Only Traditional Upgrade

Performing a Data-Only Traditional Upgrade

This chapter describes an abbreviated Traditional Upgrade method that can be used if the customer has made no software modifications that need to be brought forward to the new release of the software. In this method, only customer business data is preserved, and all other changes that might have been made to the software are overwritten. Basically, the process is a new installation of the software for everything except the business data. The business data is then converted to the new release by running table conversions on this data source only.

In this abbreviated method, you can skip many of the tasks required for a Traditional Upgrade. In some cases, you might need to slightly modify normal upgrade tasks as well.

For the data-only upgrade, the term business data refers to application tables only. Changes to control tables, such as user-defined codes (UDCs), menus, and data dictionary are merged, and additions to the Object Librarian are populated when you run the Environment Workbench. However, changes to the specification tables (including Versions List) are not merged into the new release. Custom or modified tables, business functions, and applications are also not preserved in this process.

This section includes these tasks:

- *Testing Long File Names*
- *Pre-Upgrade Procedures*
- *Installing the Deployment Server*
- *Planning the Upgrade*
- *Running Installation Workbench*
- *Custom Modifications and Packages*
- *Upgrading the Production Environment*

Testing Long File Names

Before you run a data-only Traditional Upgrade, you must test the cross-reference table to ensure that you can create tables with names longer than 10 characters. To test the cross-reference table, follow the procedure described in Section 4.3.9, "Testing Long File Names on the IBM i" in the Chapter 4 of this guide.

Pre-Upgrade Procedures

These procedures do not apply to a data-only upgrade because control table changes and customizations are not carried forward to the new release.

Skip the following steps which are in the *Before You Begin the Installation and Upgrade* section of this guide:

- *Preparing the Development Environment*
- *Checking Modification and Merge Flags*
- *Refreshing the Control Tables*

Instead of refreshing the existing user defined code and menu tables, delete them to ensure that they will be reloaded at the new release level when you run the Installation Workbench. Do not delete the F0002 and F00021 tables; these control tables must match the business data tables in order for the Next Numbers to be correct. Alternatively, you can save the control tables (menu, UDC, and data dictionary tables) and run the Control Table merge to update the tables with the new software release information.

See Also

Verifying Custom Changes in Master Control Tables in the *Before You Begin the Installation and Upgrade* section of this guide.

Installing the Deployment Server

Install the Deployment Server as instructed in the chapter of this guide entitled: *Working with the Deployment Server*. You must then load central objects for the environment that you are installing (for example, if you are upgrading the production environment, run the loaded or reloaded executable program).

Planning the Upgrade

When defining the plan, do the following:

- Verify that the Upgrade Environment and Table Conversions options are turned on.
- Set up the plan to upgrade the chosen environment.
- Do not turn on Specification Merges.
- If you choose not to delete the control tables, set the Control Tables Merges to merge.

Once you have defined your plan, go back to **Work with Installation Plans**. Highlight your plan and click **Expand**, and then choose the table conversion section and click Select.

Because you need to run only the vertical application table conversions, delete any of the following table conversion records that are in your plan. The records listed in your plan will depend on the version of the software from which you are upgrading. Some records might be listed multiple times.

- F89210
- F98710
- F9210 (R8989210)
- F98741 (R89IDVAR)
- F9862
- F98740

- F98741 (R8998741)
- F98752
- F98753
- F98720
- F9210 (R899210)
- F98711
- F98743
- F98762
- F98745
- F98760
- F98750
- F98751
- F98761 (R8998761)
- F98761 (R8998763)
- F98762
- F98950
- F9860
- F89210
- F983051
- F98306

Running Installation Workbench

Run Installation Planner as you normally would for an upgrade, and complete all of these Installation Workbench tasks:

- *Working With Initial Tasks Workbench*
- *Configuring Your Locations*
- *Configuring Your Data Sources*
- *Configuring Your Environments*
- *Using Machine Workbench*
- *Verifying the Table Conversion Process* (for business data only)
- *Using Remote Location Workbench*

Custom Modifications and Packages

Do not perform the following chapter if you do not need to distribute customizations:

- *Building and Testing Packages*

When testing the new release, use one of the delivered standard packages, because no modifications are carried forward.

Upgrading the Production Environment

If you are upgrading the production environment, follow the instruction for creating a production plan. Keep in mind the notes for Installation Planner, and repeat the steps above for removing the listed tables from the Table Conversion Planner.

17 Creating a Remote Installation Plan

Understanding Remote Installation Plans

Installation Planner is a *Release 9.2* application that runs on the Deployment Server. It is a system administration tool that guides you through the process of configuring the machines on which your company will run *Release 9.2* .

To set up *Release 9.2* for a remote location, create a plan that includes remote locations. Complete the tasks in this section after you create and complete a basic installation plan, and are ready to add the remote locations to the configuration. This section includes information for installing an alternate language.

Before you begin, decide what your replication strategy is for *Release 9.2* . You can use Installation Workbench to copy the system, data dictionary, control, constant and master tables to your remote location. Ongoing replication of the data in these sources must be implemented using third-party software; *JD Edwards EnterpriseOne* does not have a built-in replication engine.

The information that you provide on the Installation Planner forms, such as database type and Enterprise Server type, determines the information that the system displays on the remaining forms.

See Also

Reviewing Installation Planner Processing Options for more information about how the processing options for Installation Planner also affect the choices that you are given while setting up your plan

> **Note:** *Installation Planner Considerations.* Depending on which tables you want to replicate, you are prompted for different data source information. For example, if you choose to replicate the control tables, you are asked to define the control tables data source.

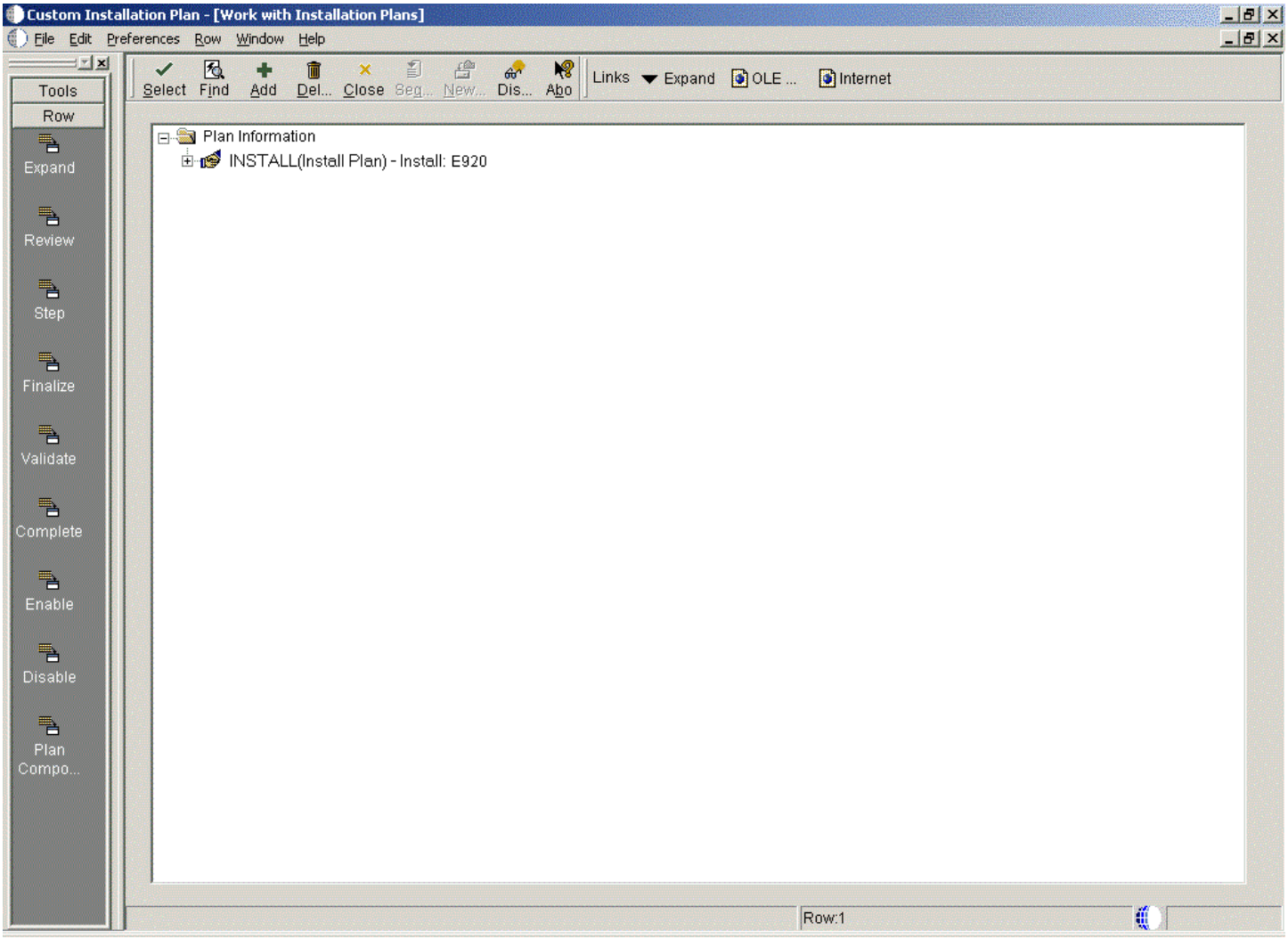
> **Note:** *Data Source Considerations. JD Edwards EnterpriseOne* provides configured data sources. However, when you run Installation Planner, you might need to modify some data source information to reflect your system-specific configuration. Only data sources that are referenced in the replication forms appear when you create a remote plan.

Starting Installation Planner

To start Installation Planner:

1. Log on to *Release 9.2* as user JDE with the database password for user JDE.
2. Access the planner environment (*JDEPLAN*).

3. From the System Installation Tools menu (GH961), click Custom Installation Plan.

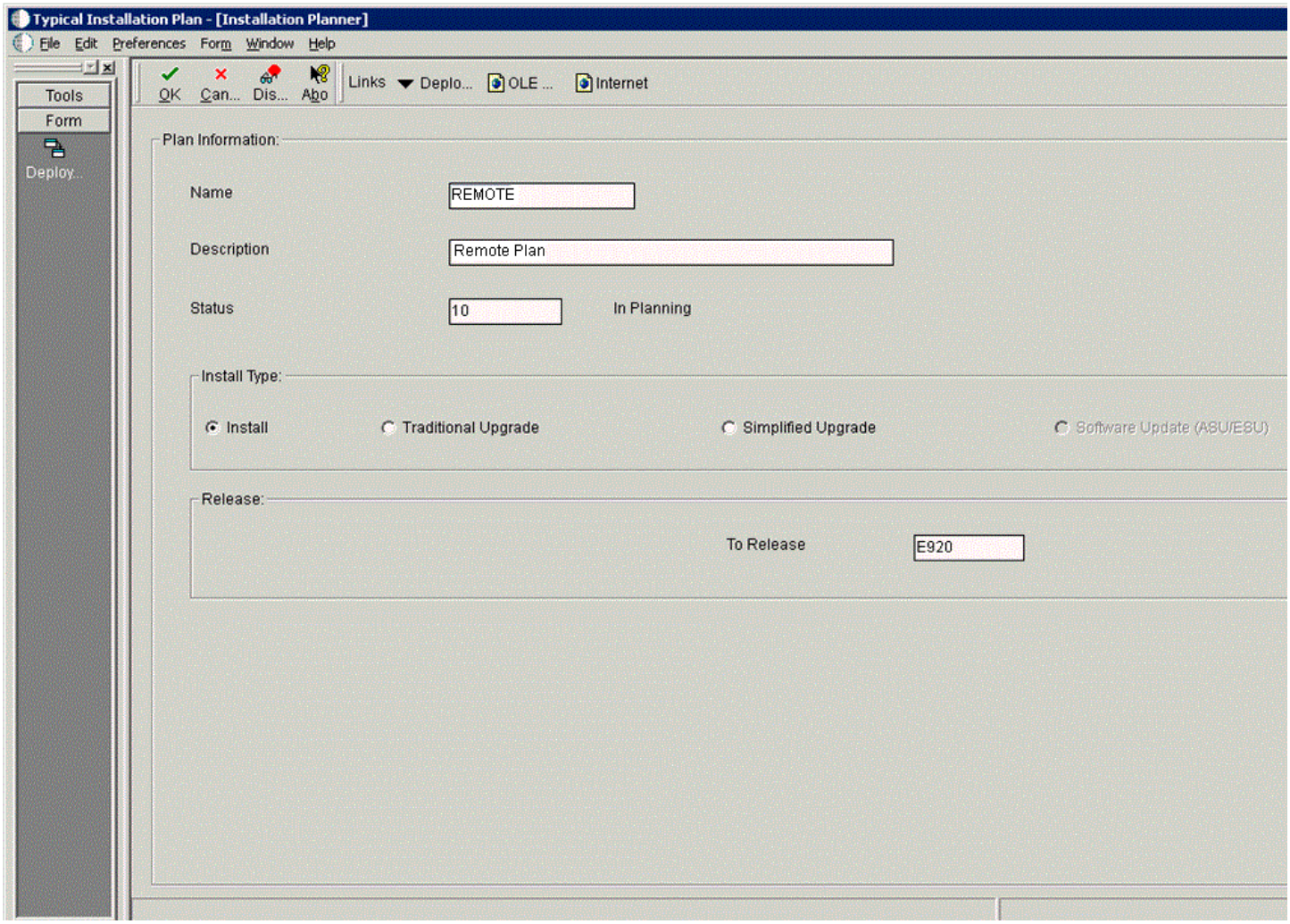

Custom Installation Plan - [Work with Installation Plans]
File Edit Preferences Row Window Help
Tools
Row
Expand
Review
Step
Finalize
Validate
Complete
Enable
Disable
Plan Compo...
Select Find Add Del... Close Seg... New... Dis... Abo
Links Expand OLE ... Internet
Plan Information
INSTALL(Install Plan) - Install: E920
Row:1

4. On Work with Installation Plans, click the **Add** button.

   The Installation Planner form appears.

Entering Information in Installation Planner

To enter information in Installation Planner:

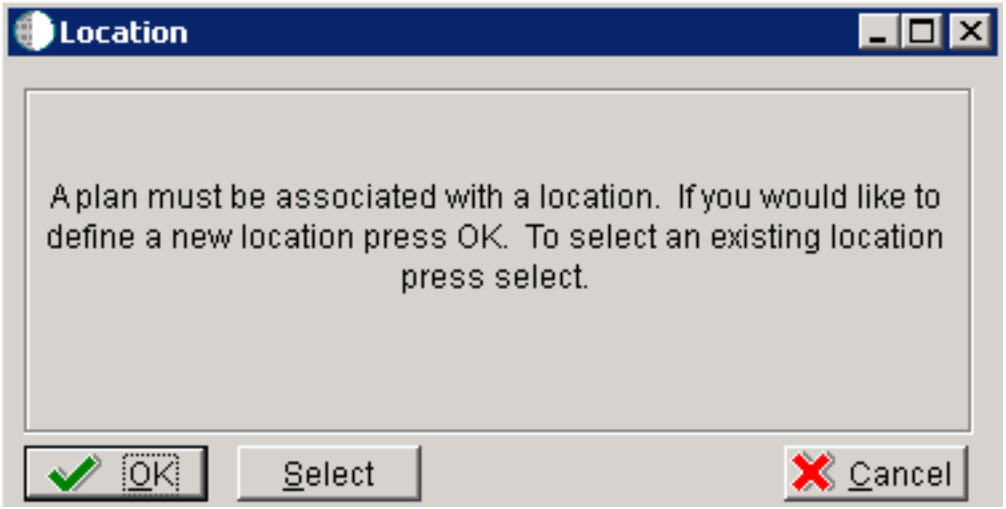


1. On Installation Planner, complete these fields:

Field	Description
Name	Enter the name of your remote plan.

Field	Description
Description	Enter the description of your remote plan.
Status	Select 10 as the status of your remote plan.
Install Type	Select Install.
To Release	Verify that the release number is *E920* .

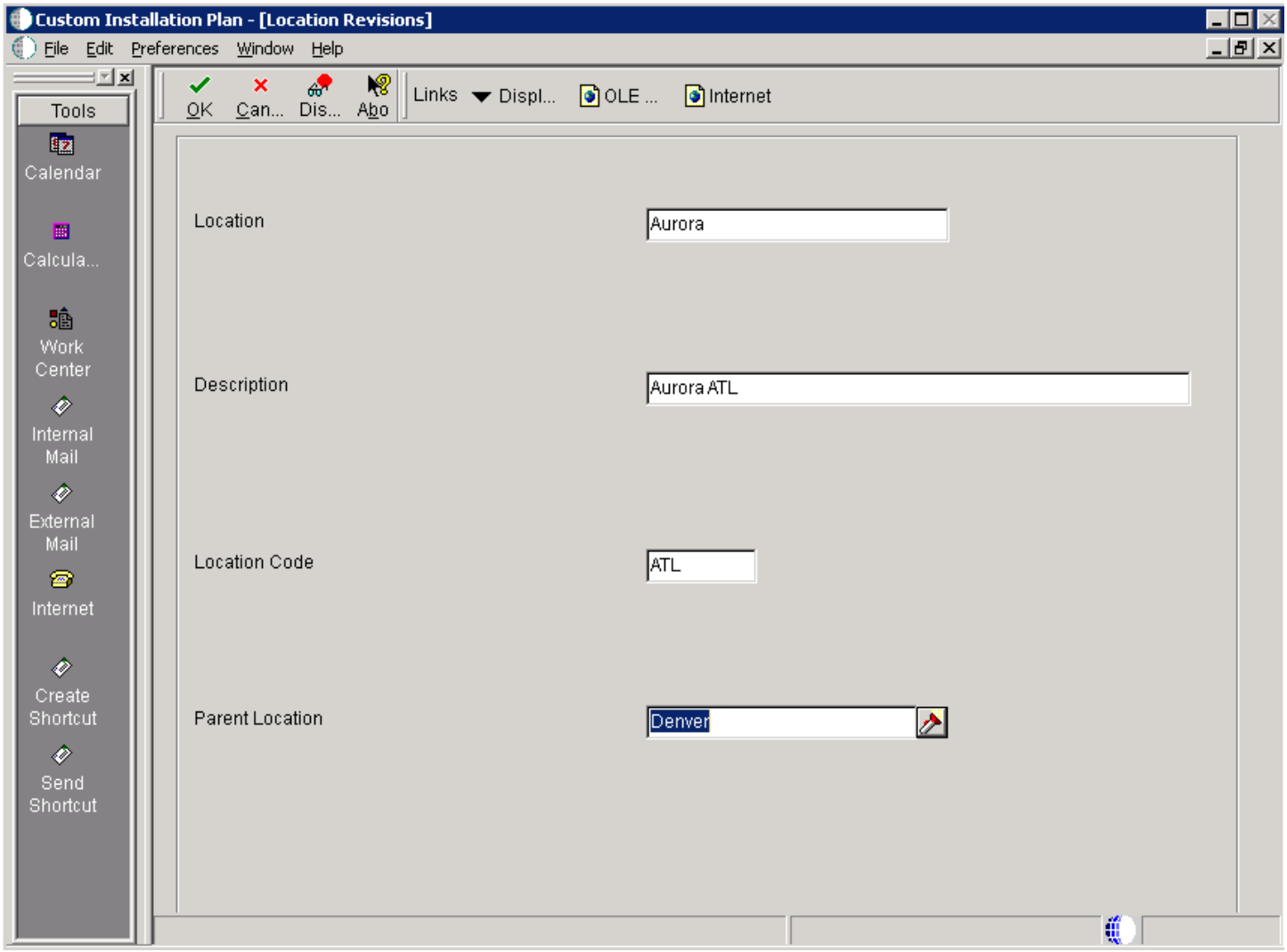
2. On Installation Planner, click the **OK** button.



3. On the Location dialog, click the **OK** button.

Entering Plan Location Information

To enter plan location information:



1. When you are prompted to enter new location information, click the **OK** button to enter a new location.

2. On Location Revisions, complete these fields:

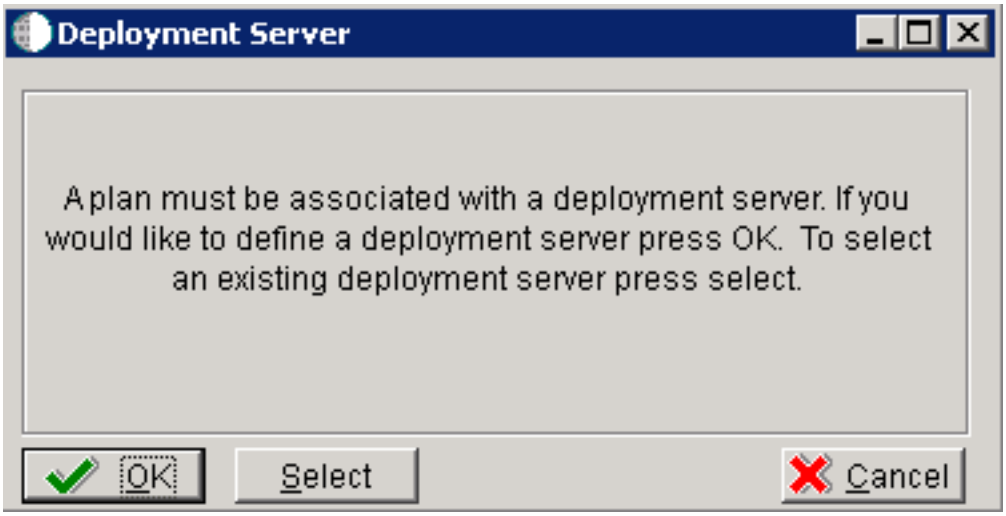
Field	Description
Location	Enter the location to which this plan applies. The location could be a city, company headquarters, or a division of a company.
Description	Enter a description of the location name.
Location Code	For a remote location, enter a 3-character alphanumeric identification code. This 3-character code is used as a prefix for the environments of the remote location, and a suffix is attached for replicated data sources. For example, you might use DAL if the location were Dallas, Texas. In that case, the prototype environment would be named DAL *PY920* , and the business data data source would be named Business Data - CRPDAL.
Parent Location	Enter the parent location to which this remote location is attached.

3. Click OK.

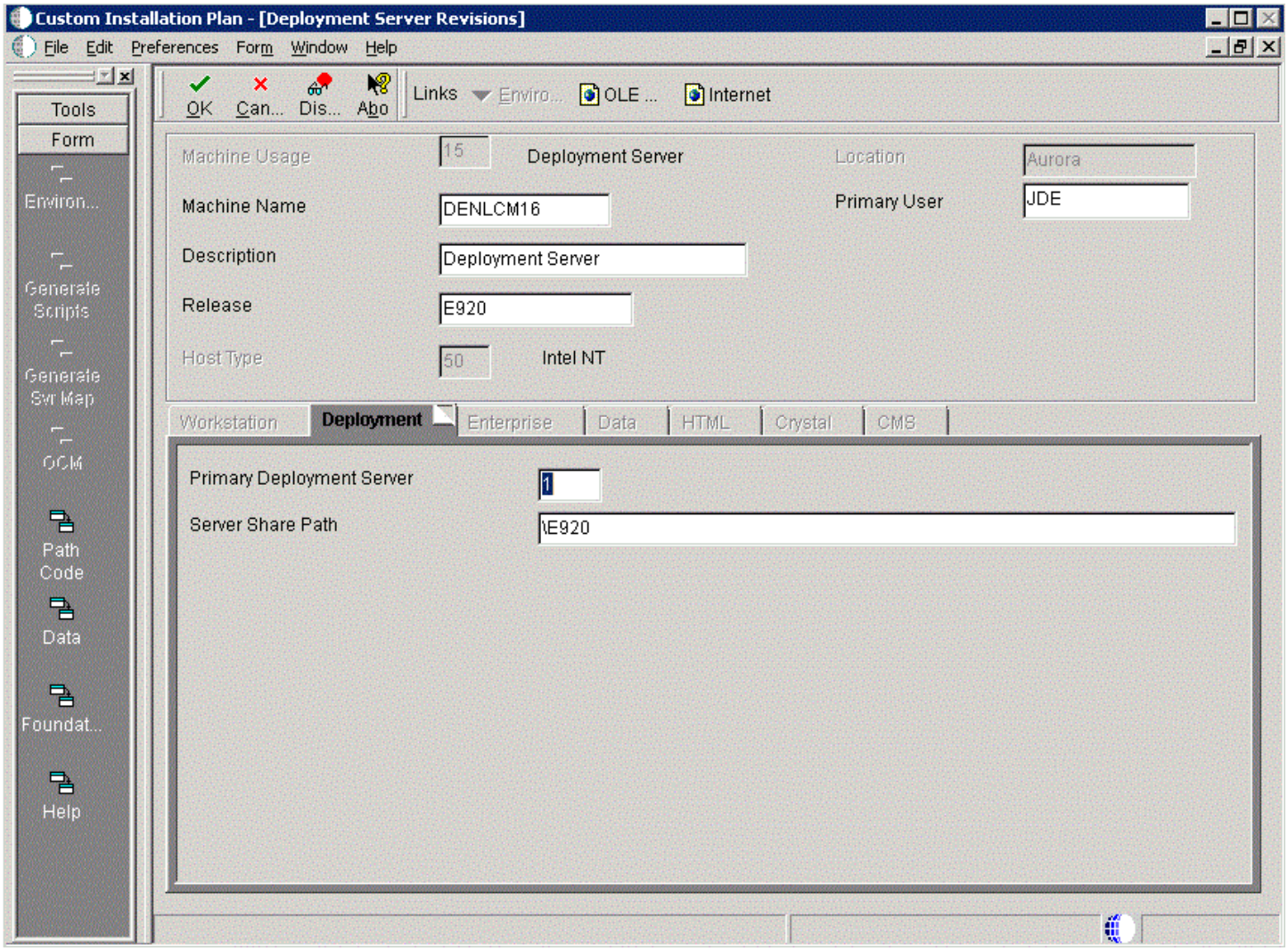
Entering Deployment Server Information

Once a plan location is specified, complete the information for the Deployment Server. You are given the option to enter a new Deployment Server or choose an existing one. For most situations, you will have a tiered Deployment Server for the remote location.

To enter Deployment Server information:



1. At the Installation Planner prompt asking if you want to enter new Deployment Server information, click the **OK** button to add a Deployment Server.


Custom Installation Plan - [Deployment Server Revisions]
File Edit Preferences Form Window Help
Tools
Form
Environ...
Generate Scripts
Generate Svr Map
OCM
Path Code
Data
Foundat...
Help
OK
Can...
Dis...
Abo
Links
Enviro...
OLE ...
Internet
Machine Usage
15
Deployment Server
Location
Aurora
Machine Name
DENLCM16
Primary User
JDE
Description
Deployment Server
Release
E920
Host Type
50
Intel NT
Workstation
Deployment
Enterprise
Data
HTML
Crystal
CMS
Primary Deployment Server
1
Server Share Path
\E920

2. On Deployment Server Revisions, complete these fields:

Field	Description
Machine Usage	Displays the default value of 15 to indicate that this is a Deployment Server.
Machine Name	Enter the name of your Deployment Server. The name is case sensitive, should not exceed 15 characters, and should not contain any special characters.
Description	Enter a description of the machine name. This name includes the location with which this Deployment Server is associated, and whether or not it is the primary server.
Release	Enter the *Release 9.2* release number that you are installing, or use the visual assist button to choose one from the list. For example, *E920* is the current release.
Host Type	Displays the default value of 50 to indicate that the server type is an Intel NT.
Location	Displays the default location chosen for this plan.
Primary User	Enter the user to whom email is sent when a package is deployed. The default for Primary User is JDE.

3. On the **Deployment** tab, complete these fields:

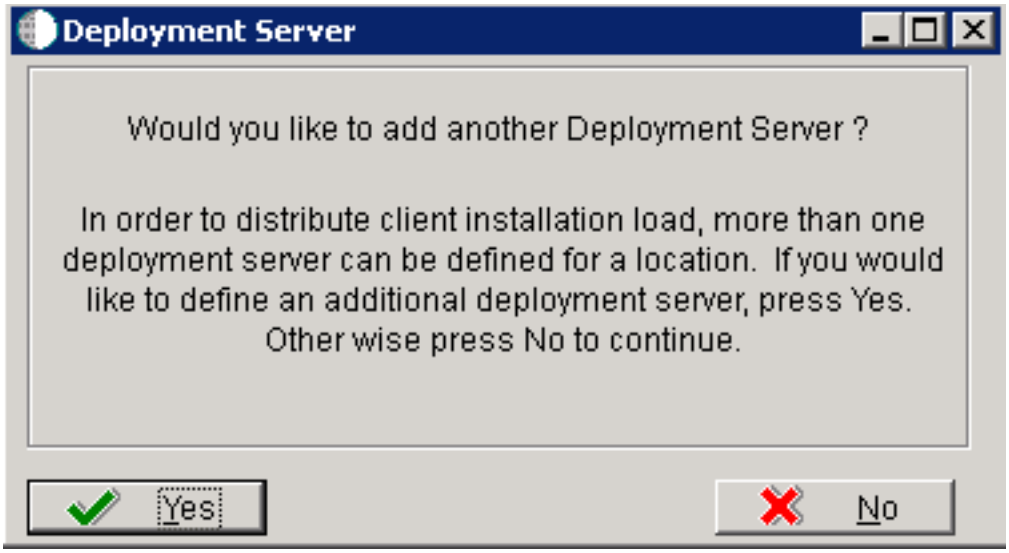
Field	Description
Primary Deployment Server	Enter the hierarchy of the servers. Type 0 (zero) if a primary Deployment Server for the location exists and this is a secondary server. Type *1* if this is the primary Deployment Server for the location.
Server Share Path	Enter the server share path where you installed *Release 9.2* on your Deployment Server. Make sure that this path is specific to your version of the release. For example, for *Release 9.2* , the path ends with\ ***E920*** .

4. Click the **OK** button.

> **Tip:** If you enter invalid information into a tab field, a stop sign symbol appears next to the tab name, such as Deployment Server. For more information about the error, click the stop sign icon in the bottom right-hand corner of the form.

5. Click OK.

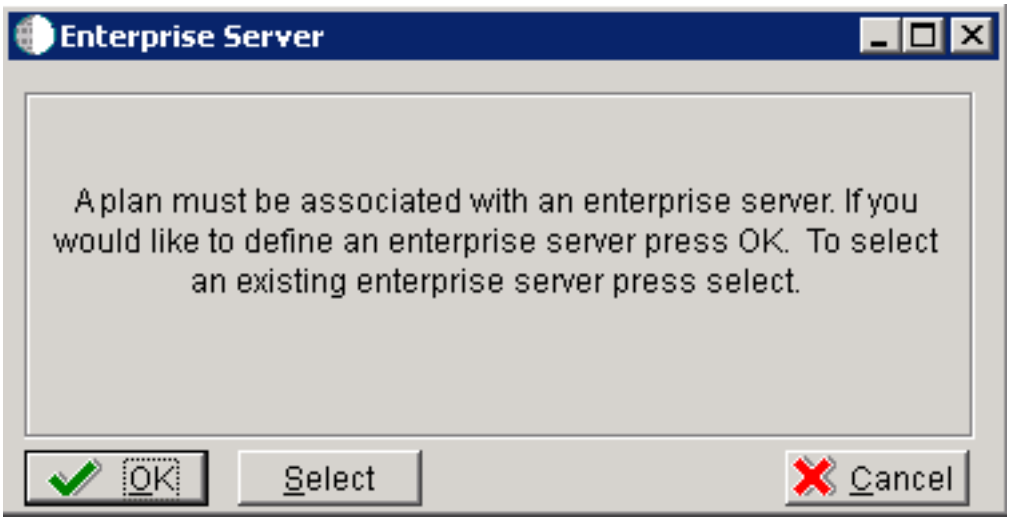
> **Tip:** If you enter invalid information into a tab field, a stop sign symbol appears next to the tab name, such as Deployment Server. For more information about the error, click the stop sign icon in the bottom right-hand corner of the form.



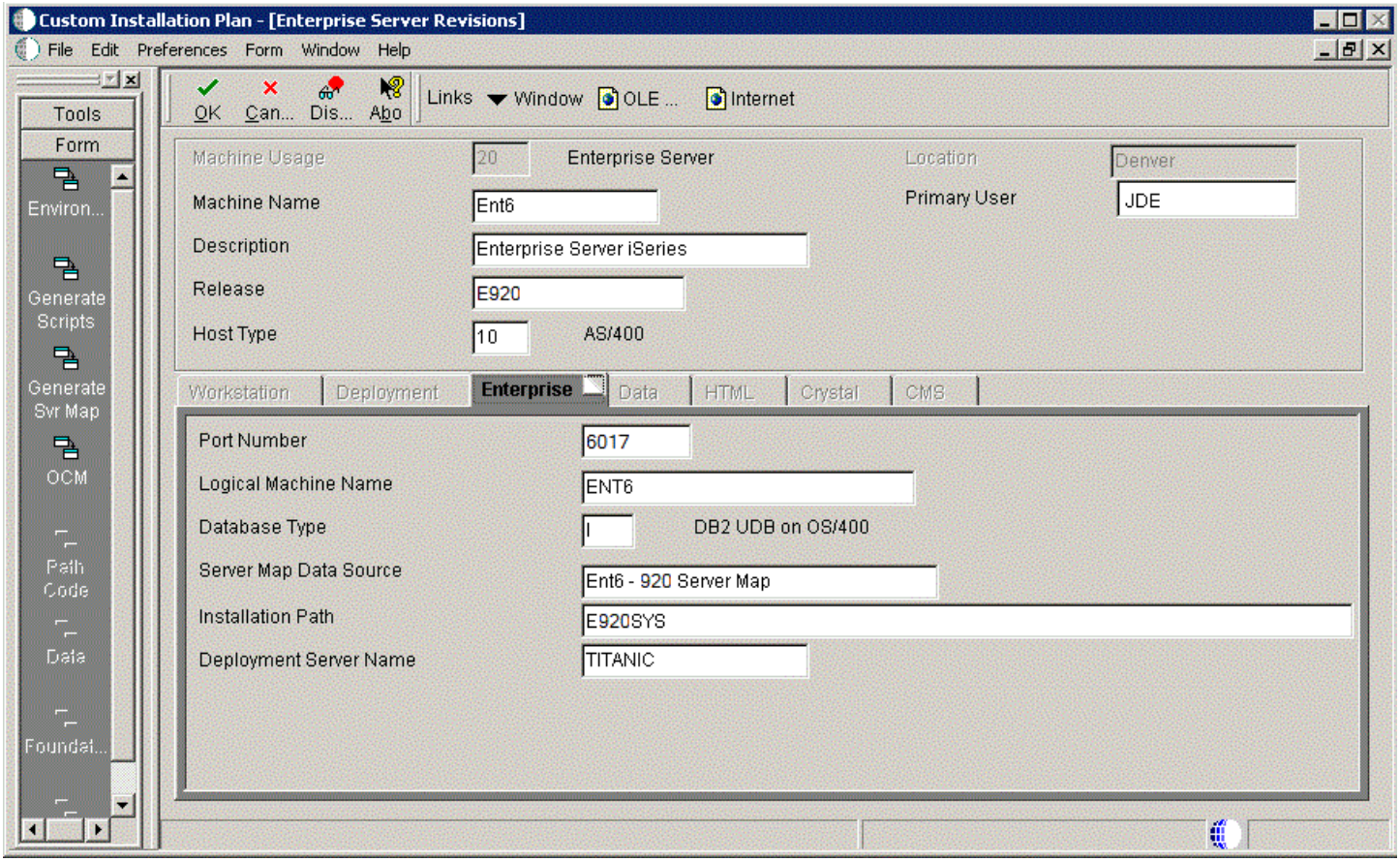
6. To continue with Remote Installation Planner setup, click the **No** button.

Entering Enterprise Server Information

> **Note:** During the definition of the Enterprise Server, a port number must be defined. While Enterprise Servers running the same release can use the same port number, an Enterprise Server running two different versions of software must use two different port numbers.



On Enterprise Server, click the OK button to define a new Enterprise Server, or click the **Select** button to choose an existing Enterprise Server.



1. On Enterprise Server Revisions, verify or complete these fields:

Field	Description
Machine Name	The name of the primary Enterprise Server. The name is case sensitive and should not contain any special characters. Because the machine name is used to create the Server Map datasource name, and because the Platform Pack Installer does not restrict you from entering a machine name that results in a datasource name greater than 30 characters; if the machine name for the Enterprise Server is longer than 13 characters, the resulting datasource name will be longer than the allowed 30 characters. For example, if your machine name is 15 characters (A23456789012345), the base datasource name input into the Planner would be: **`A23456789012345 - 920 Server Map`**. **Note:** The field in table F98611 is a hard restriction; the field only allows 30 characters. The actual field size cannot be modified or changed. When the Planner runs it truncates the value to 30 characters because that is the restriction in the F98611 table. The Platform Pack does not truncate the value when it builds the **`JDE.INI`** for the Enterprise Server. Therefore, any value greater than 30 characters will result in a mismatch between the **`JDE.INI`** and the F98611 table. That is, using the previous example, the **`JDE.INI`** would have the full length value **`A23456789012345 - 920 Server Map`** (which is 32 characters) while the F98611 populated by the Planner would have a value of **`A23456789012345 - 920 Server M`**. To remedy, you could do any one of the following: o Manually modify values in table F98611 to match the truncated value in the **`JDE.INI`** file. o Ensure that the value is not truncated by limiting the datasource name to 30 characters (this would mean limiting the machine name for the Enterprise Server to 13 characters). o Manually truncate the value in the F98611 table (for example, **`A23456789012345 - 920 Svr Map`**. In any case, you **must** ensure that the values for Server Map datasource names in the F98611 table exactly match those in the **`JDE.INI`** file on the Enterprise Server.
Description	Enter a description for the machine.
Release	Enter the release number to which this plan applies, or use the visual assist button to choose one from the list. The default value is *E920* .
Host Type	Click the visual assist button and choose the type of Enterprise Server you are adding to the plan. In this case, IBMi.
Location	The location chosen for this plan appears by default.
Primary User	The user to whom an email is sent when a package is deployed. The default value for Primary User is JDE.

Field	Description

Note: The case of machine name must also match the network ID for that machine.

2. Continuing on Enterprise Server Revisions, select the **Enterprise** tab, and complete or verify these fields:

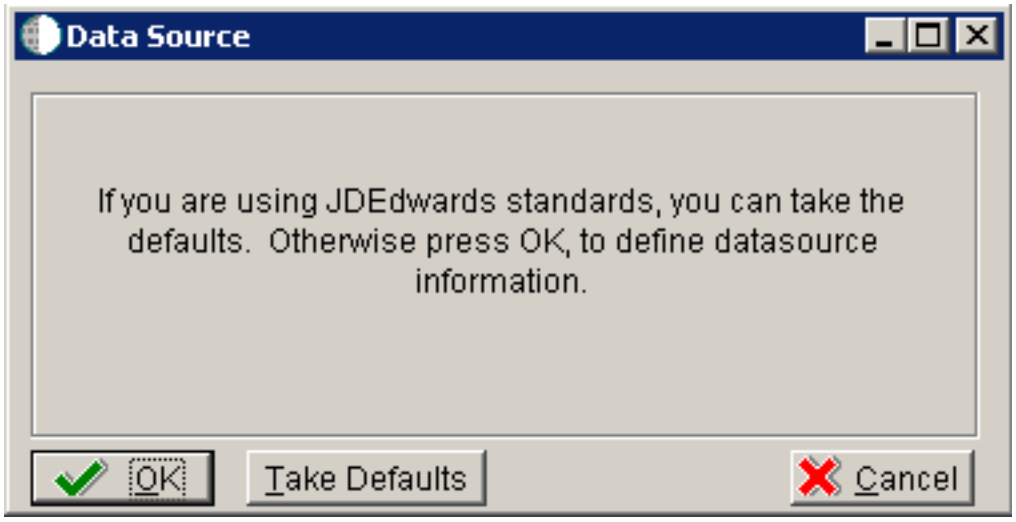
Field	Description
Port Number	The port number value (*6017*) for this Enterprise Server appears by default from the **JDE.INI**.
Logical Machine Name	The Installation Planner detects and provides a default value based on the current machine name on which the program is running. The name is case sensitive, should not exceed 15 characters, and should not contain any special characters.
Database Type	Enter the value for your database: **I - DB2 400** (*DB2 for IBM i*)
Server Map Data Source	Whenever you enter a host type, the Installation Planner populates this field with a default value: *machinename* - 920 Server Map where *machinename* is the name of your machine.
Installation Path	Verify that the default value is the installation directory path to which you want to install *Release 9.2* on the Enterprise Server. Make sure the value is specific to your version of the release. For example, for *Release 9.2* the default path is: **\JDEdwards\PPack\ *E920SYS*** This is the system library. **Caution:** You must change the value that defaults into the *Installation Path* field as shown in the screen capture above.
Deployment Server Name	Using the visual assist button, choose the name of the Deployment Server to which this Enterprise Server is attached. A Deployment Server name appears in this field by default, but it can be changed if necessary.

Note: If you change the port number to a value other than *6017* , you must also change this setting in both the Enterprise Server and Development Client **JDE.INI** file.

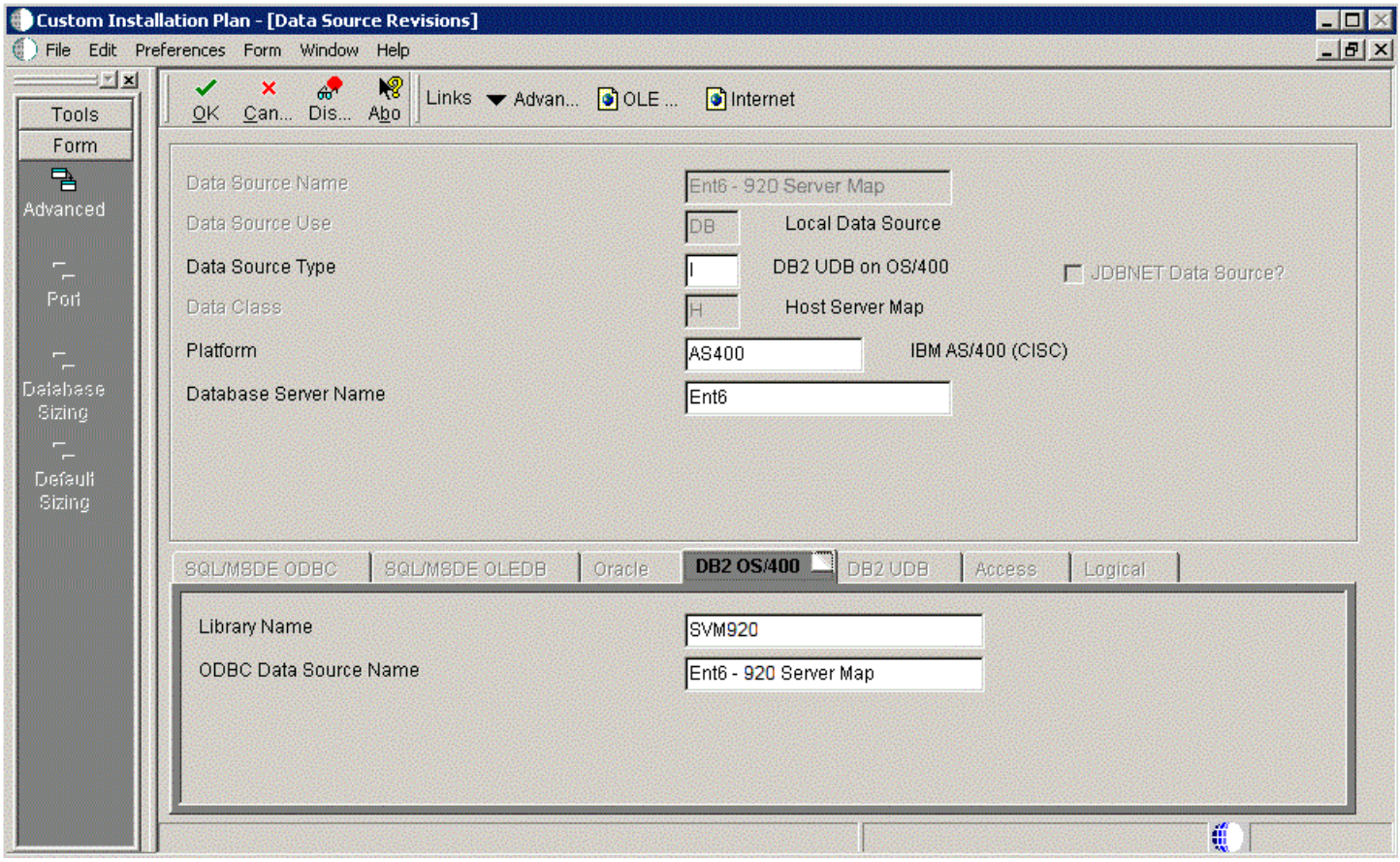
3. Click the **OK** button.

Enter Data Source Information for Server Map

To enter information for the Server Map data source:

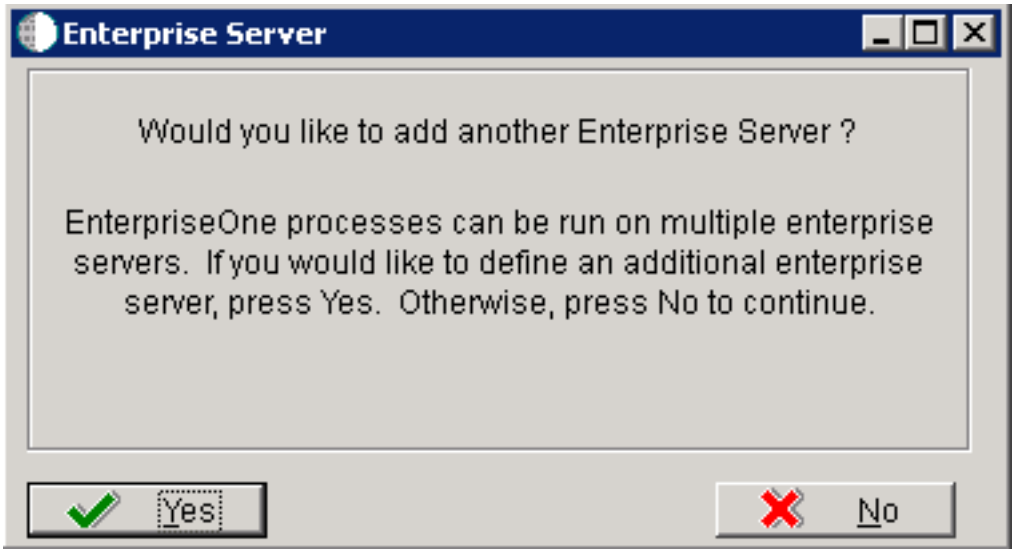


1. On Data Source, click the **OK** button to continue entering unique data source information.



2. On Data Source Revisions, verify the accuracy of the Server Map data source.

3. Click the **OK** button.



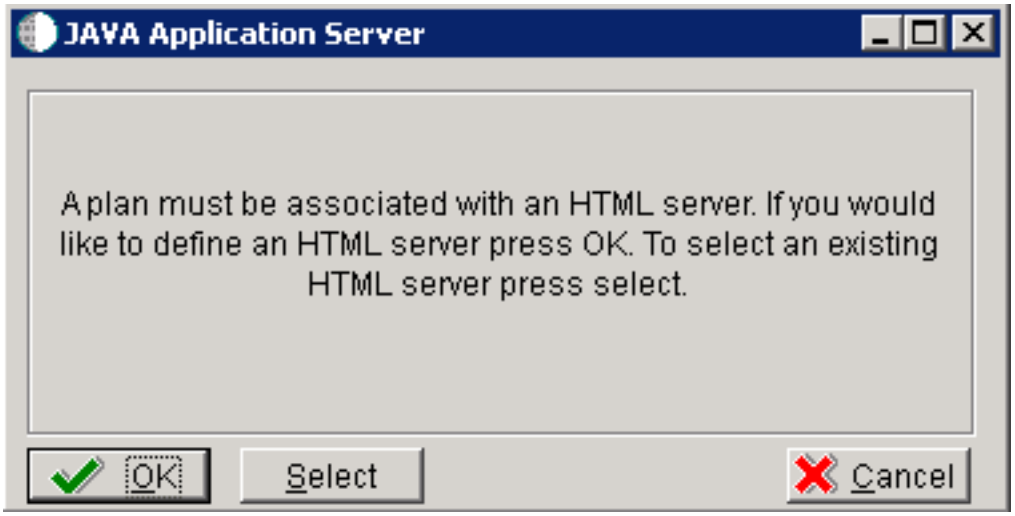
4. On the **Would you like to add another Enterprise Server?** dialog, click the **Yes** or **No** button.

Entering Information

Note: For *Release 9.2* , the current terminology and that used in this guide is to refer to the machine running the *JD Edwards EnterpriseOne* Java Application Server (JAS) as the *HTML Web Server* . Functionally, these terms are all synonymous. However, this guide only uses the terms JAS or Java Server when explicitly labeled as such by the software.

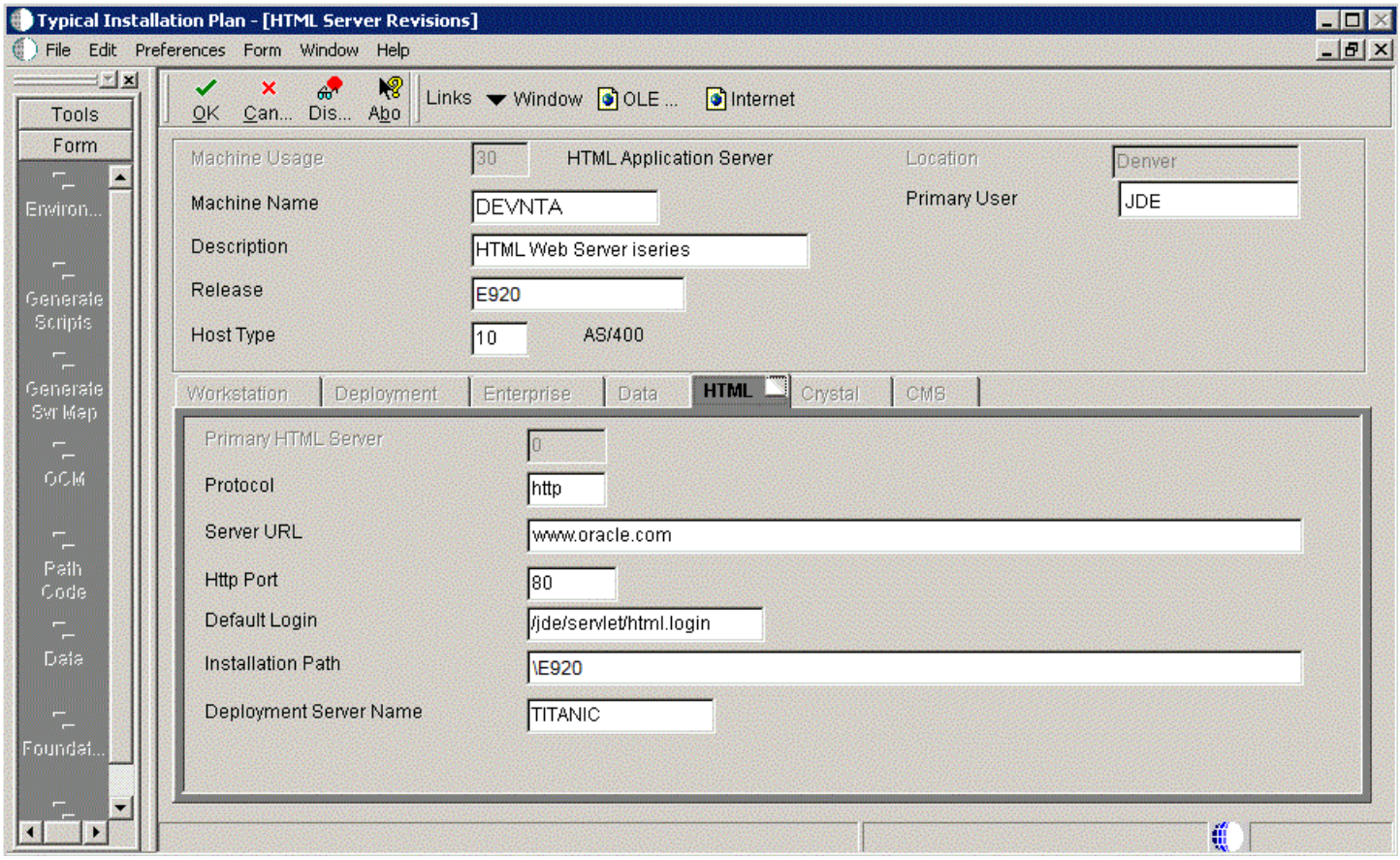
CAUTION: The *HTML Web Server* is mandatory for the majority of *JD Edwards EnterpriseOne* applications because the end-user applications are only accessible through a web interface.

To enter *HTML Web Server* information:



1. Click the **OK** button to define a new HTML Server, or click the **Select** button to choose from a list of existing HTML Servers.

   If you choose **Select**, you are presented with the Machine Search table, from which you can make your selection.



2. On HTML Server Revisions, complete these fields:

Field	Description
Machine Usage	The default value of 30 indicates that this is a *HTML Web Server* .

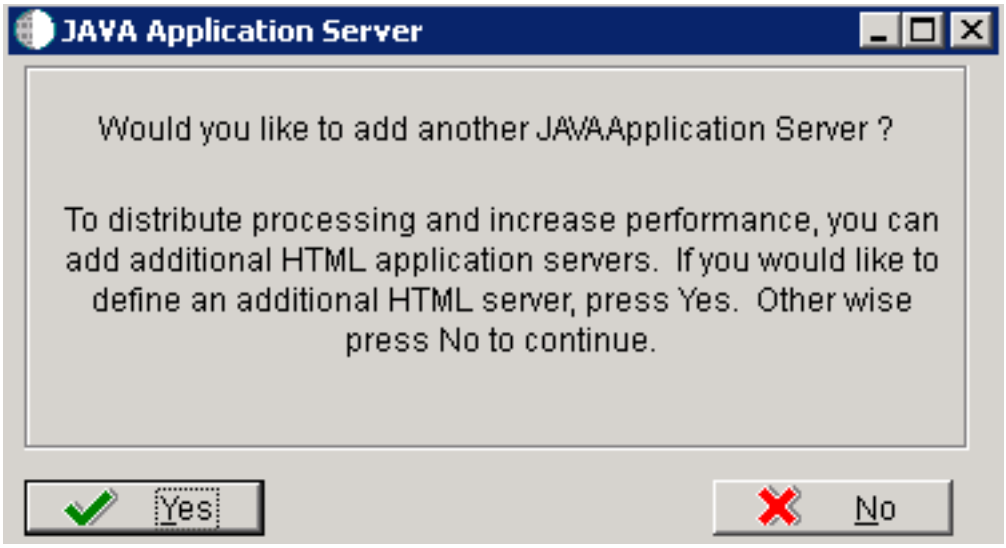
Field	Description
Machine Name	Enter the name of your *HTML Web Server* . The name is case sensitive, should not exceed 15 characters, and should not contain any special characters.
Description	Enter a description of the *HTML Web Server* machine.
Release	Enter *E920* to indicate the release number that you are installing.
Host Type	The default value of 50 specifies the server type as Intel NT. Select the correct server type.
Location	The location chosen for this plan appears in this field by default.
Primary User	The user to whom an email is sent when a package is deployed. The default for Primary User is listed in the ***jde.ini*** .

3. On the **HTML** tab, complete these fields:

Field	Description
Primary HTML Server	When the system code generates an email message with a web shortcut pointing to a form, the web shortcut generated points to the "Primary" *HTML Web Server* . Only one of all the *HTML Web Server* s defined in installation planner can be defined as primary ("1").
Protocol	This is the protocol used by the HTML Web Server. Valid values are *http* or *https*.
Server URL	This is the Domain Name System (DNS) host name of the *HTML Web Server* . The syntax is: **server_name:port\jde\owhtml** For example: **DEVNTA:81\jde\owhtml**
Http Port	This is the port number the *HTML Web Server* is listening to. For HTTP, the typical port number is *80*. For HTTPS, the typical port number is *443*.

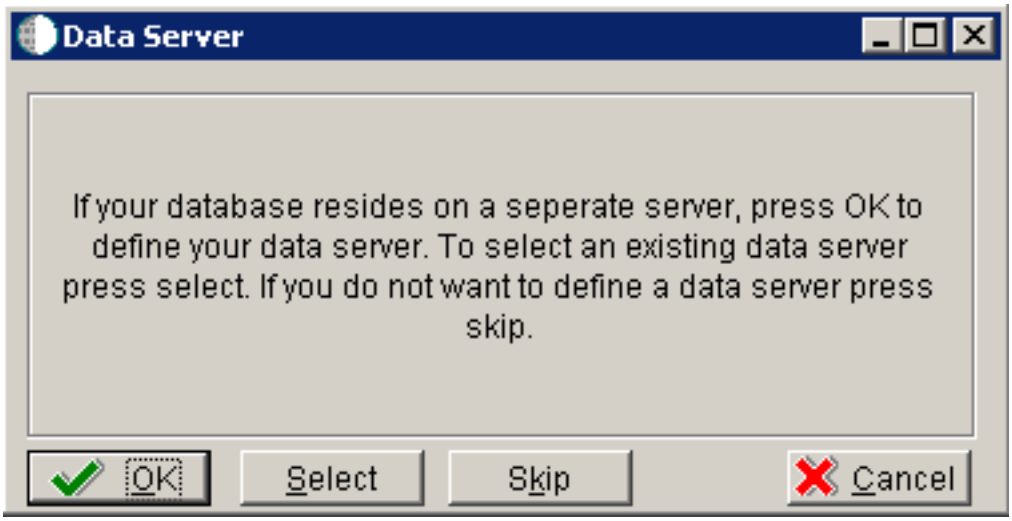
Field	Description
	However, you can choose to implement a *HTML Web Server* using a different port number.
Default Login	Defines how shortcuts to a web form are generated by the system code. Values are either a reserved value or an explicit servlet name. Reserved values are: o *Standard* The URL generated will point to a servlet on the Primary *HTML Web Server* . o *Redirector* The URL generated will point to redirector in the Primary *HTML Web Server* , and redirector will point to a servlet on another *HTML Web Server* for load balancing. The servlet name to use is generated by the system. o *Explicit Servlet Name* The user can specify an explicit servlet name in this field. In this case, the redirector functionality cannot be used. The URL generated will point to the specified servlet in the Primary *HTML Web Server* . Usage of Explicit servlet name is for backward compatibility only. You should not use it unless you have a direct need.
Installation Path	Enter the installation directory path to which you are installing *Release 9.2* on your *HTML Server* .Make sure this is specific to your version of the release, and also the platform and application server on which your *HTML Web Server* is running. For default paths, refer to the applicable platform- and application server-dependent version of the *JD Edwards EnterpriseOne HTML Web Server Reference Guide* (*JD Edwards EnterpriseOne Transaction Server Reference Guide* , *JD Edwards EnterpriseOne Transaction Server Guide for UNIX using Oracle WebLogic Server* , *JD Edwards EnterpriseOne Transaction Server Reference Guide for Microsoft Windows using WebSphere* , *JD Edwards EnterpriseOne Transaction Server Reference Guide* , *JD Edwards EnterpriseOne Transaction Server Reference Guide for IBM i using WebSphere* . Otherwise, you must obtain this value from the HTML Web Server machine itself, or its administrator.
Deployment Server Name	Using the visual assist button, choose the name of the Deployment Server to which this HTML Web Server is attached. A Deployment Server name appears in this field by default, but you can change it if necessary.

4. Click the **OK** button.



5. To add another *HTML Web Server* , click the **Yes** button and repeat steps 1 through 4 to define another *HTML Web Server* .

Entering Data Server Information



1. On Data Server, choose one of these options:
   - OK

     If your database resides on a separate server, choose click OK to continue entering unique Data Server information.
   - Select

     Click this option to select an existing Data Server.
   - Skip

Click this option if you do not want to define a Data Server.

- On Data Source, click the **OK** button to continue entering unique data source information, or click the **Take Defaults** button to select the default data.

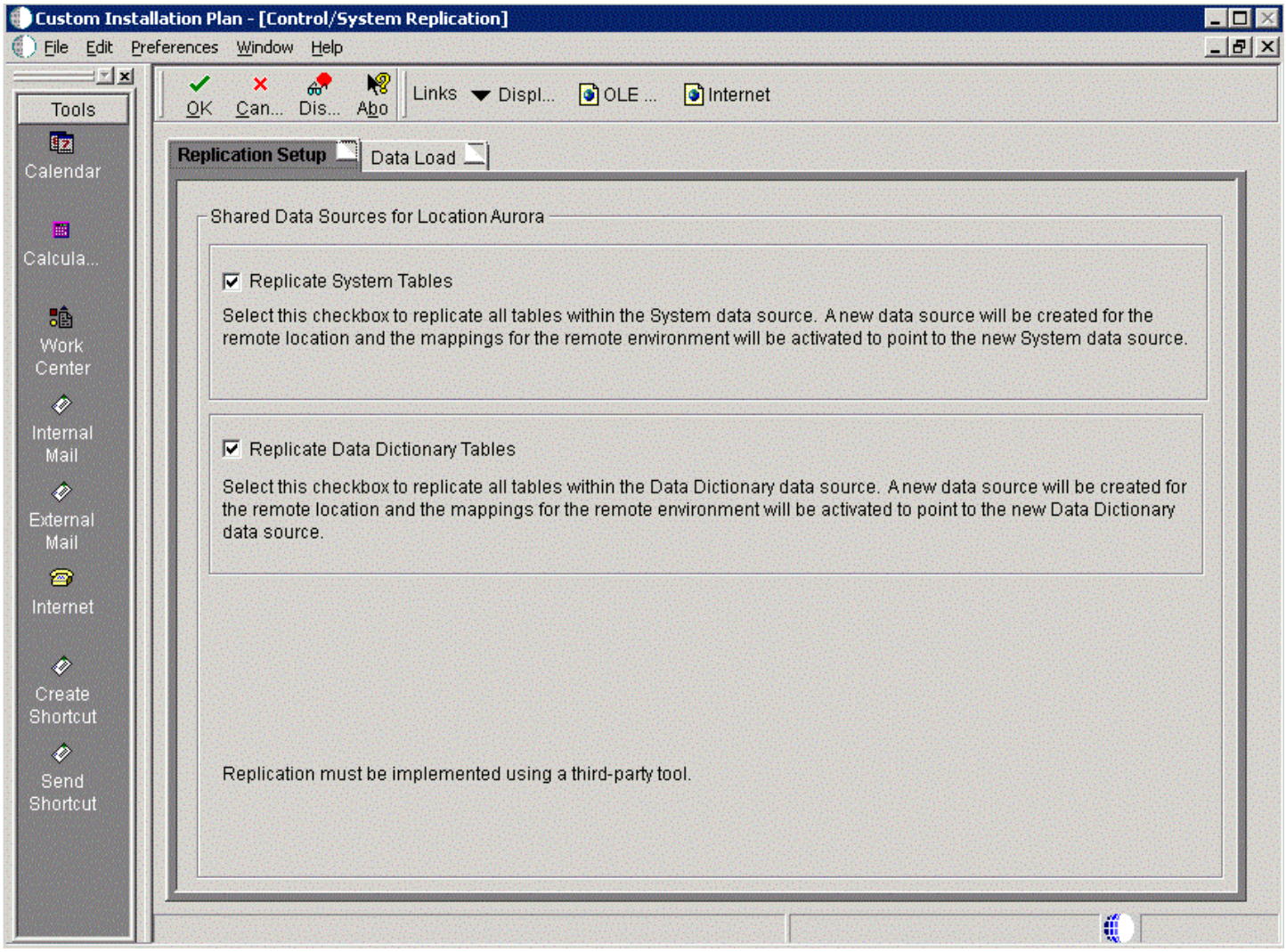
For purposes of this procedure to setup a Remote Installation Plan, the **Skip** option is assumed.

2. Click the **OK** button.

Replicating Information to Remote Locations

The options on this form determine whether the software will configure data sources and mappings for the remote location. Ongoing replication must be implemented using third-party software.

To replicate information to remote locations:

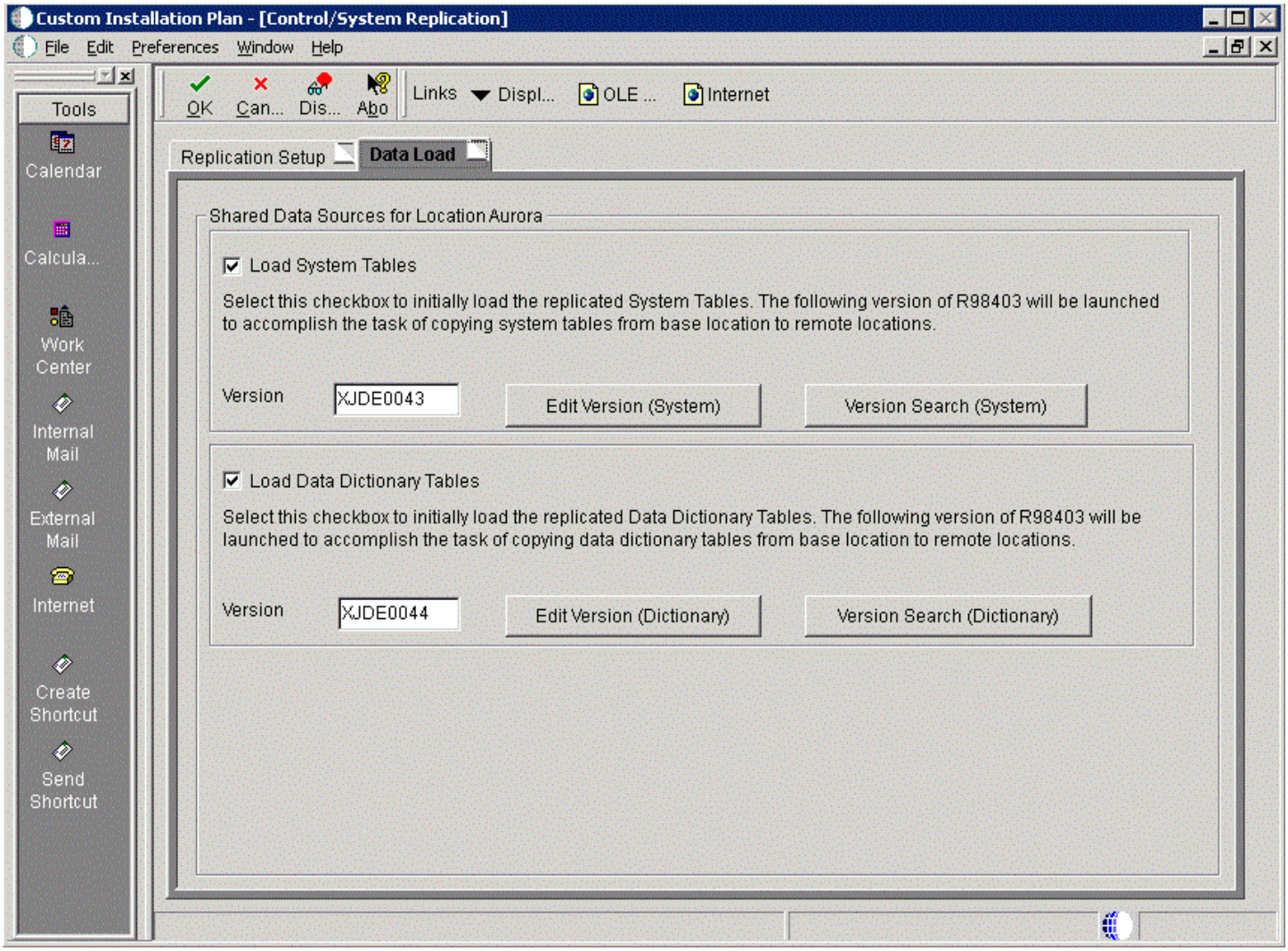


1. On Control/System Replication, select the **Replication Setup** tab and select the following options to replicate information to remote locations:

Field	Description
Replicate System Tables	Select this checkbox to replicate all tables within the System data source. A new data source will be created for the remote location and the mappings for the remote environment will be activated to point to the new System data source.
Replicate Data Dictionary Tables	Select this checkbox to replicate all tables within the Data Dictionary data source. A new data source will be created for the remote location and the mappings for the remote environment will be activated to point to the new Data Dictionary data source.

CAUTION: Replication must be implemented using a third-party tool.

2. Select the **Data Load** tab.


Custom Installation Plan - [Control/System Replication]
File Edit Preferences Window Help
Tools
Calendar
Calcula...
Work Center
Internal Mail
External Mail
Internet
Create Shortcut
Send Shortcut
OK
Can...
Dis...
Abo
Links
Displ...
OLE ...
Internet
Replication Setup
Data Load
Shared Data Sources for Location Aurora
Load System Tables
Select this checkbox to initially load the replicated System Tables. The following version of R98403 will be launched to accomplish the task of copying system tables from base location to remote locations.
Version
XJDE0043
Edit Version (System)
Version Search (System)
Load Data Dictionary Tables
Select this checkbox to initially load the replicated Data Dictionary Tables. The following version of R98403 will be launched to accomplish the task of copying data dictionary tables from base location to remote locations.
Version
XJDE0044
Edit Version (Dictionary)
Version Search (Dictionary)

3. On the **Data Load** tab, choose from the following options to copy selected tables to the remote locations:

Field	Description
Load System Tables	Select this checkbox to initially load the replicated System Tables. The following version of R98403 will be launched to accomplish the task of copying system tables from the base location to remote locations.
Load Data Dictionary Tables	Select this checkbox to initially load the replicated Data Dictionary Tables. The following version of R98403 will be launched to accomplish the task of copying data dictionary tables from the base location to remote locations..

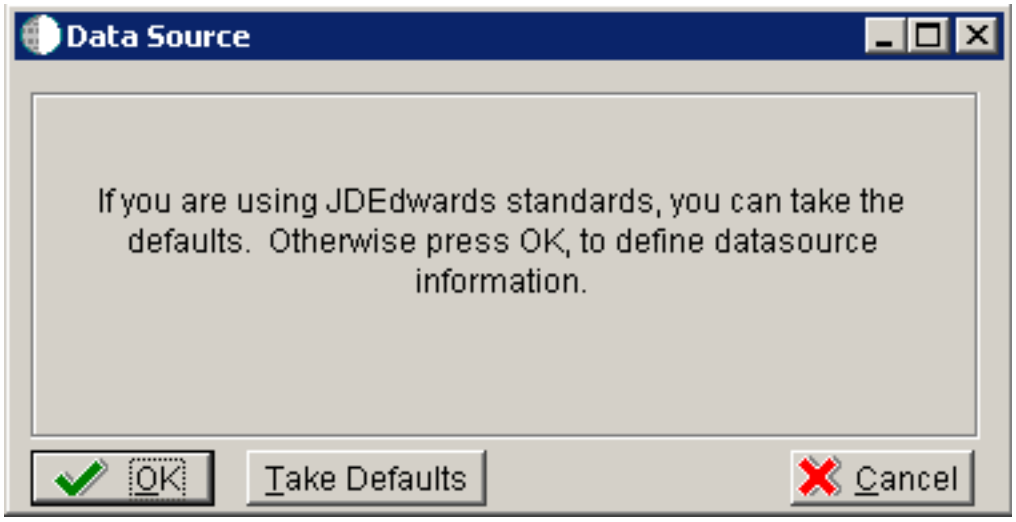
> **Note:** To edit or change the versions of the R98403 program that copy the control tables, constant tables, and master tables, click the Edit or Search buttons next to their respective versions.

> **Note:** If you have defined multiple locations, the system will prompt you to complete sets of the Replication Setup and Data Load screens for each location.

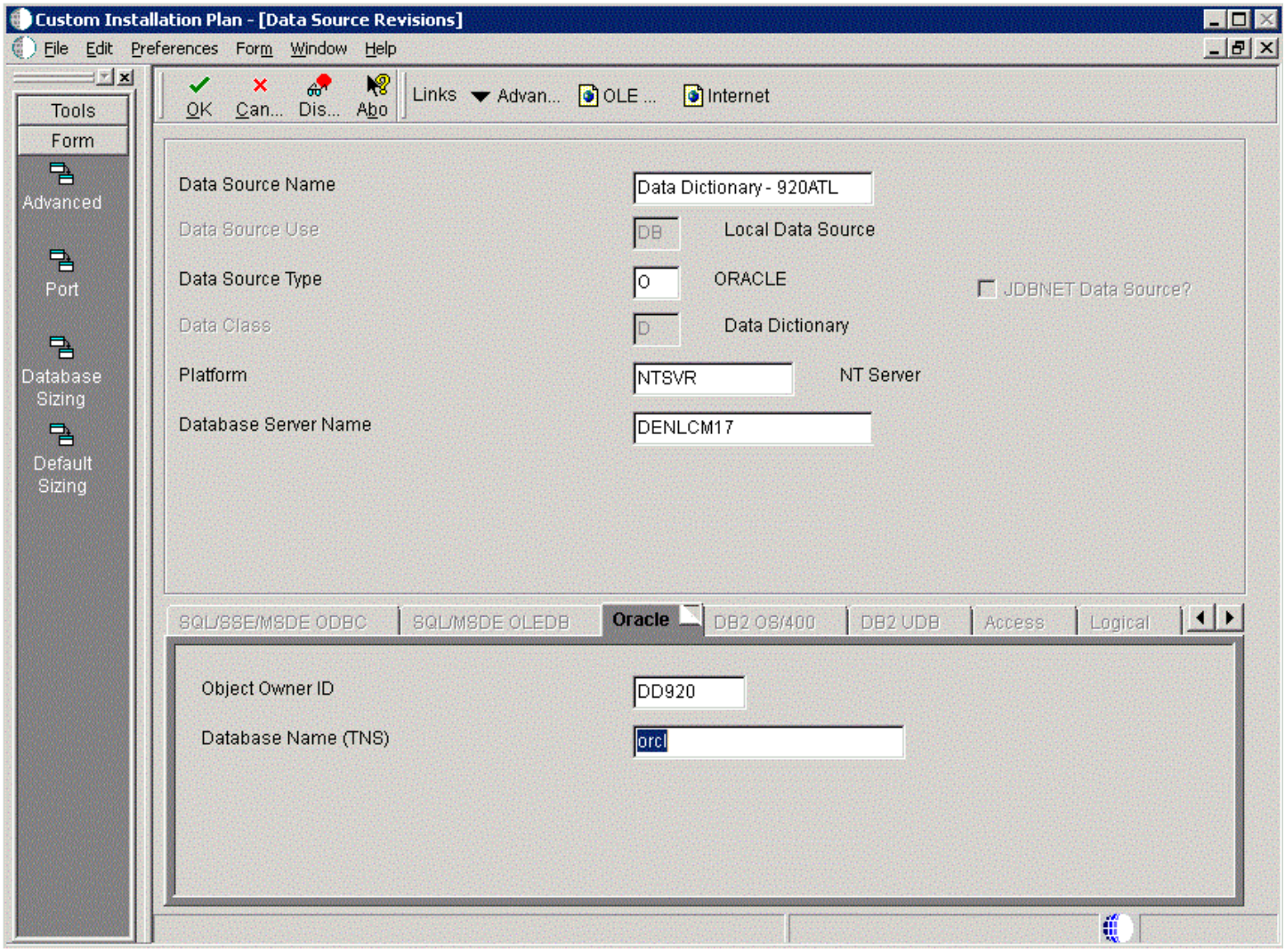
4. Click the **OK** button.

Entering Shared Data Source Information

This section describes entering the shared data source information for the Data Dictionary and System data sources.

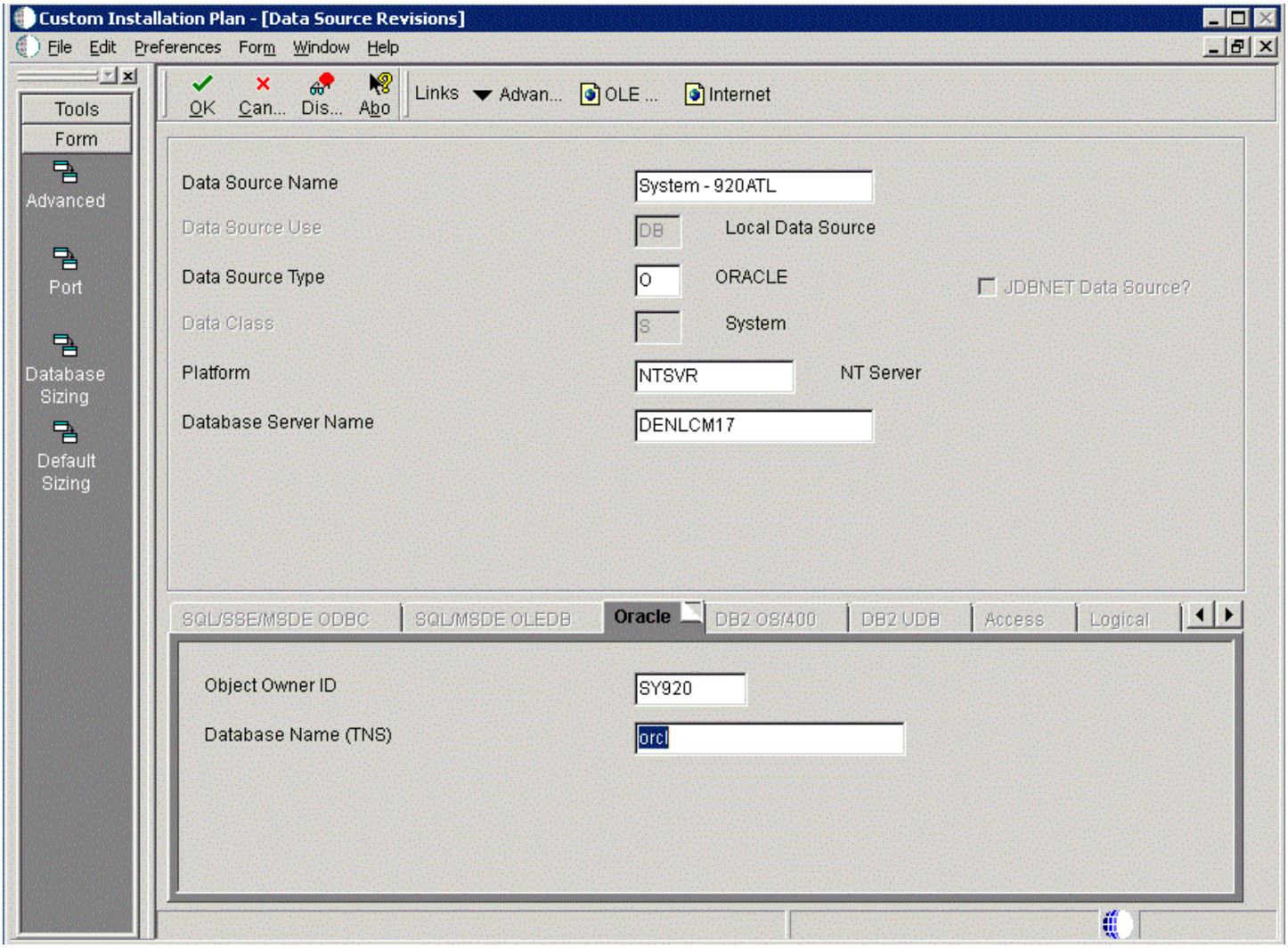


1. When you are prompted to enter the data source information for the shared data sources, to use the *Release 9.2* data sources, click the **OK** button to specify or verify the data source information.


Custom Installation Plan - [Data Source Revisions]
File Edit Preferences Form Window Help
Tools
Form
Advanced
Port
Database Sizing
Default Sizing
OK Can... Dis... Abo
Links Advan... OLE ... Internet
Data Source Name
Data Dictionary - 920ATL
Data Source Use
DB
Local Data Source
Data Source Type
O
ORACLE
JDBNET Data Source?
Data Class
D
Data Dictionary
Platform
NTSVR
NT Server
Database Server Name
DENLCM17
SQL/SSE/MSDE ODBC
SQL/MSDE OLEDB
Oracle
DB2 OS/400
DB2 UDB
Access
Logical
Object Owner ID
DD920
Database Name (TNS)
orcl

2. On Data Source Revisions, enter the data source name for the Data Dictionary data source that will be used by the remote location. For example, **Data Dictionary - 920ATL**.
3. Complete the other fields as applicable for your database and platform.

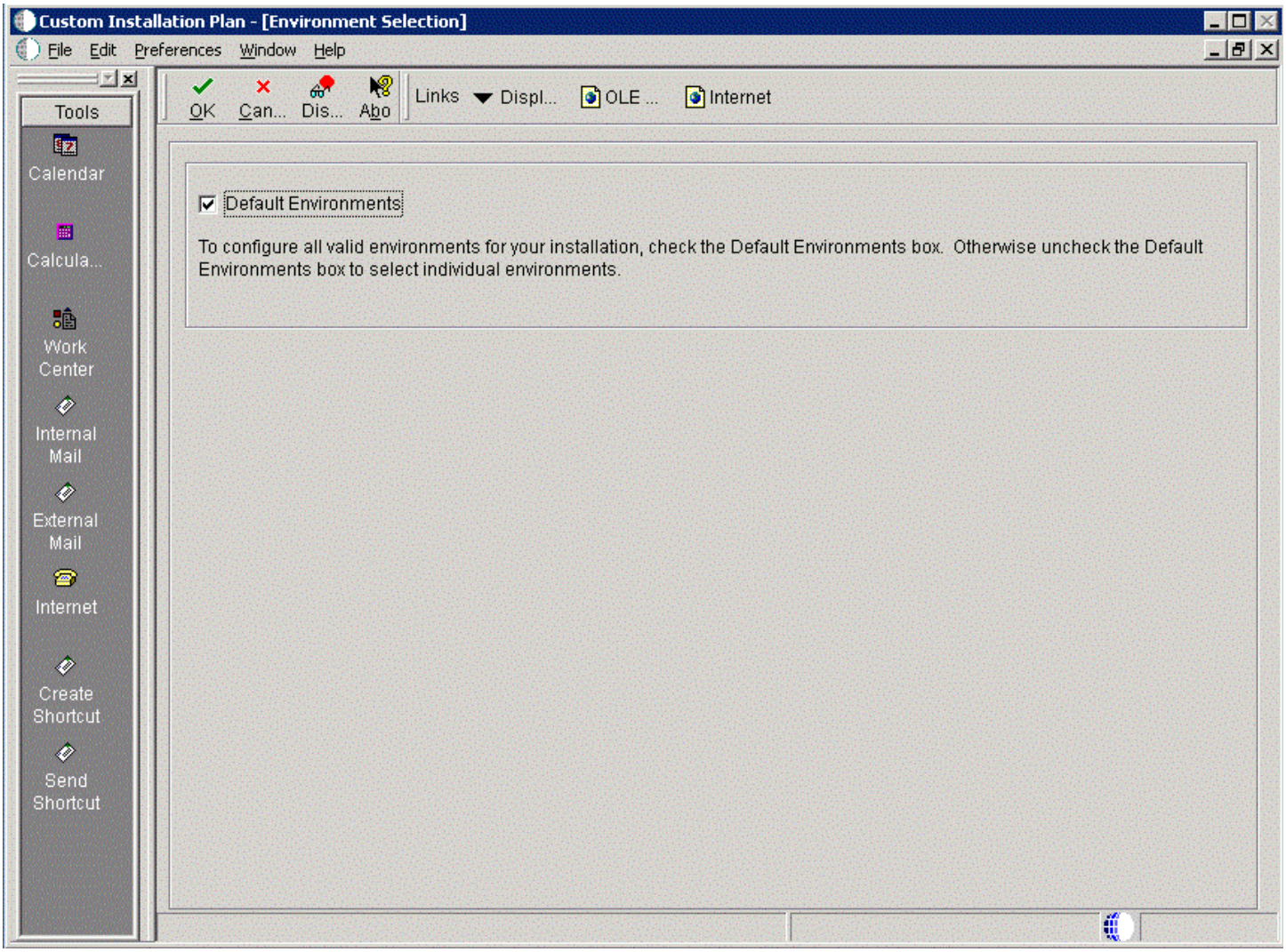
4. Click the **OK** button.


Custom Installation Plan - [Data Source Revisions]
File Edit Preferences Form Window Help
Tools
Form
Advanced
Port
Database Sizing
Default Sizing
OK Can... Dis... Abo
Links Advan... OLE ... Internet
Data Source Name
System - 920ATL
Data Source Use
DB
Local Data Source
Data Source Type
O
ORACLE
JDBNET Data Source?
Data Class
S
System
Platform
NTSVR
NT Server
Database Server Name
DENLCM17
SQL/SSE/MSDE ODBC
SQL/MSDE OLEDB
Oracle
DB2 OS/400
DB2 UDB
Access
Logical
Object Owner ID
SY920
Database Name (TNS)
orcl

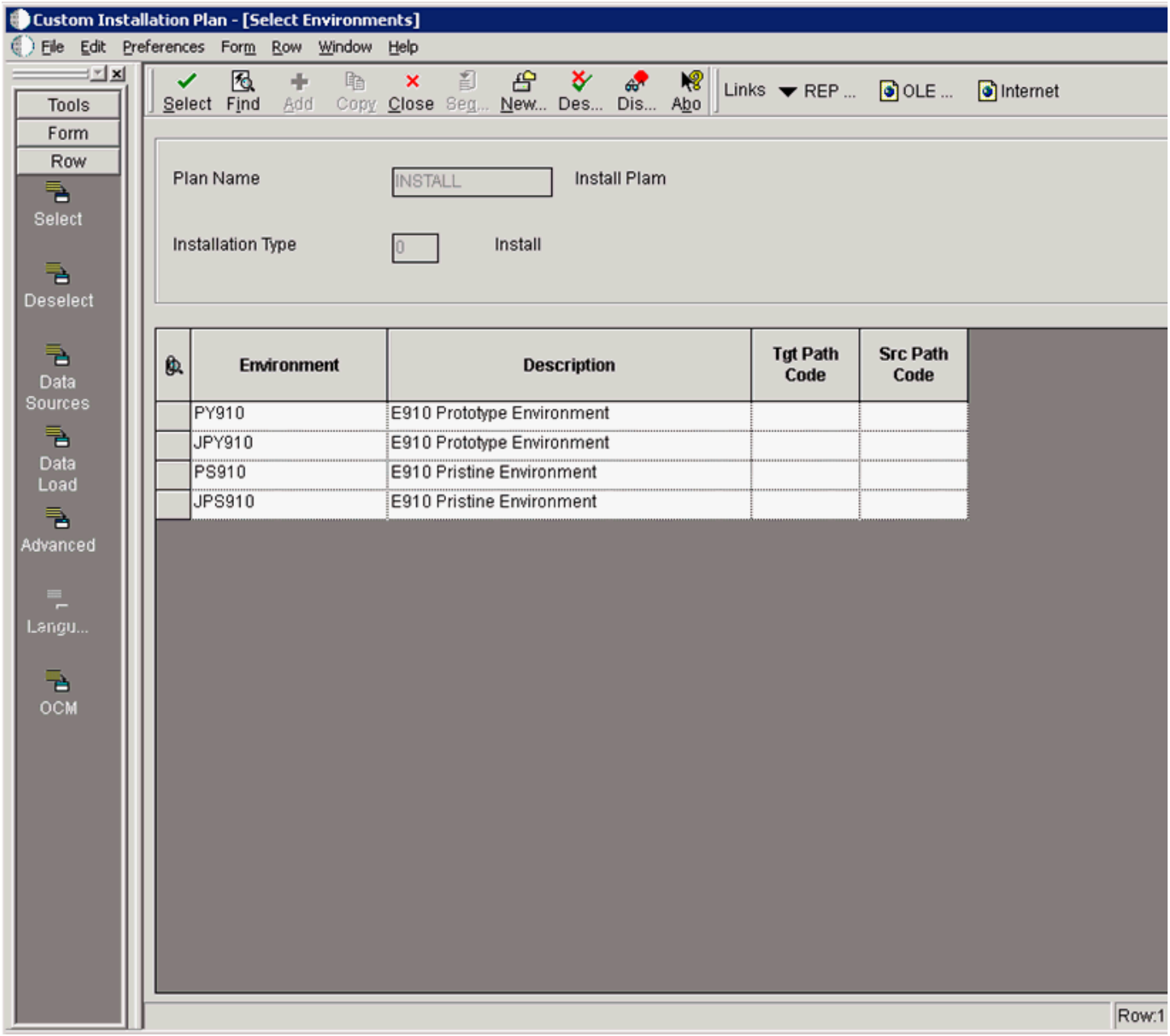
5. On Data Source Revisions, enter the data source name for the System data source that will be used by the remote location. For example, **Data Dictionary - 920ATL**.
6. Complete the other fields as applicable for your database and platform.
7. Click the **OK** button.

Setting Up Environments

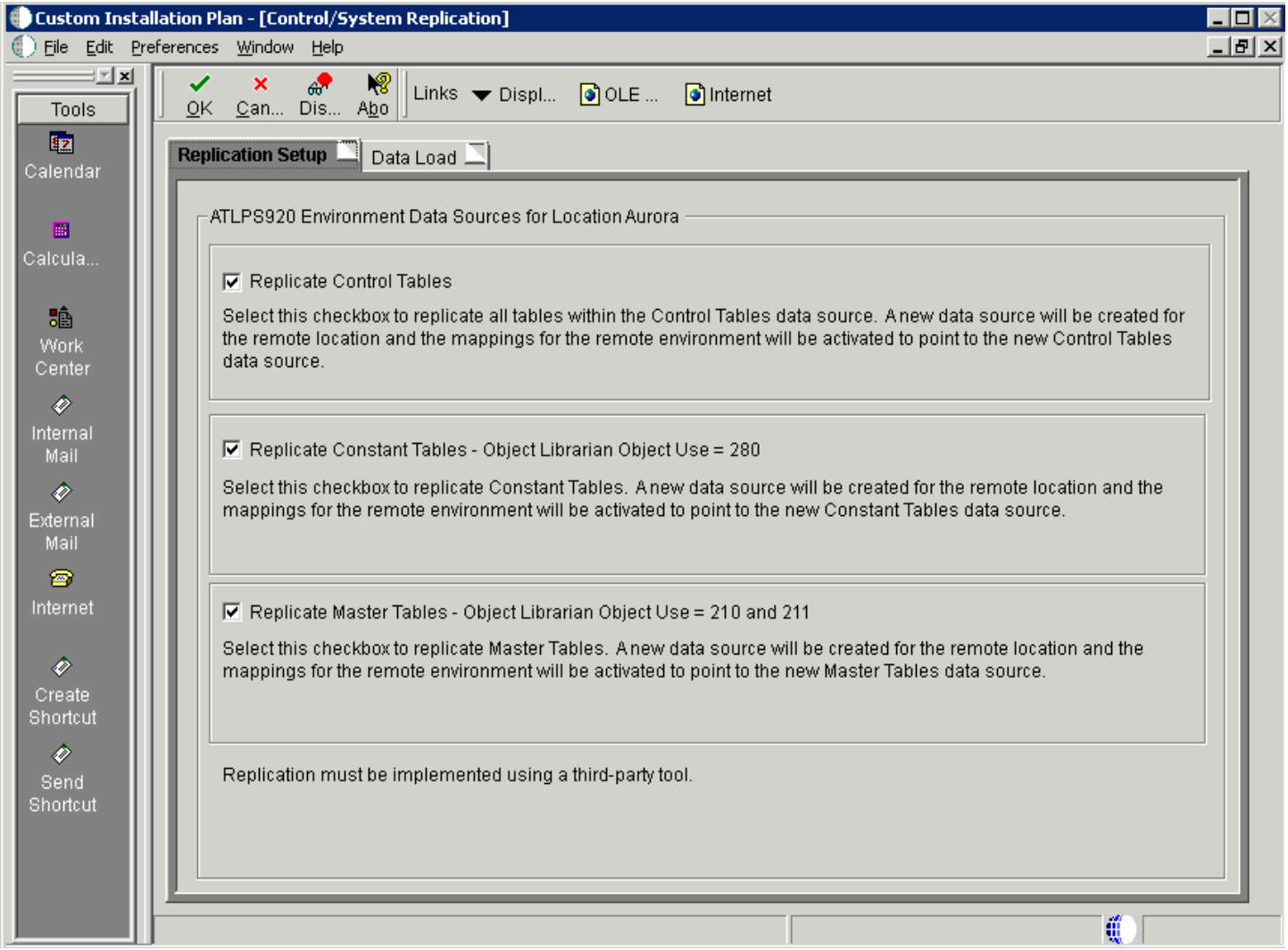
To set up environments:



1. On Environment Selection, ensure the **Default Environments** checkbox is selected and click the **OK** button.


Custom Installation Plan - [Select Environments]
File Edit Preferences Form Row Window Help
Tools
Form
Row
Select
Deselect
Data Sources
Data Load
Advanced
Langu...
OCM
Select Find Add Copy Close Seg... New... Des... Dis... Abo
Links REP ... OLE ... Internet
Plan Name
INSTALL
Install Plam
Installation Type
0
Install
Environment
Description
Tgt Path Code
Src Path Code
PY910
E910 Prototype Environment
JPY910
E910 Prototype Environment
PS910
E910 Pristine Environment
JPS910
E910 Pristine Environment
Row:1

2. On Select Environments, double click on an **Environment** to select it. Selected environments are indicated with a green check mark in the left-most column of the grid.
3. Click the **Close** button.



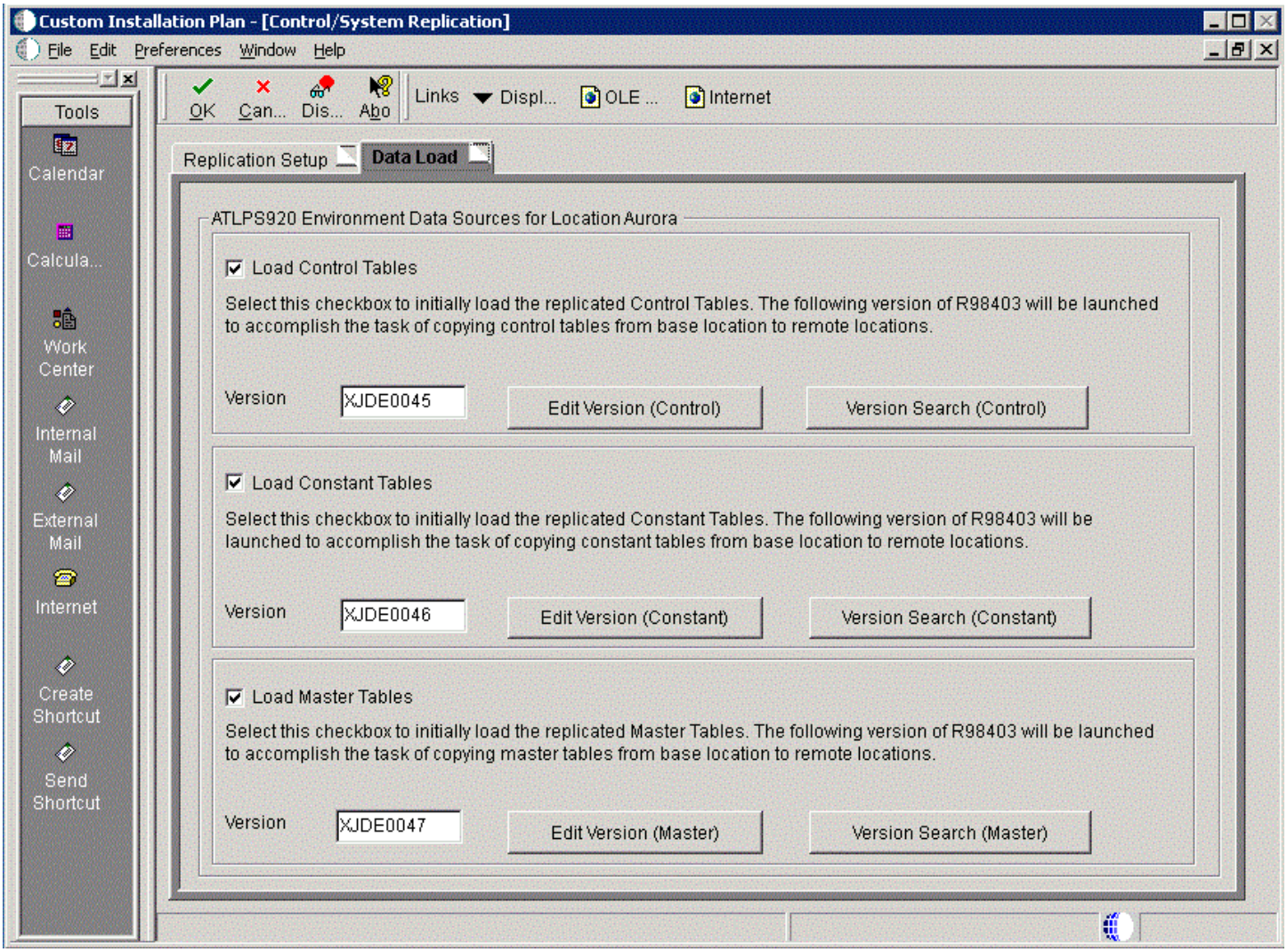
4. On Control/System Replication, select the **Replication Setup** tab and select the following options to replicate information to remote locations:

Field	Description
Replicate Control Tables	Select this checkbox to replicate all tables within the Control Tables data source. A new data source will be created for the remote location and the mappings for the remote environment will be activated to point to the new Control Tables data source.

Field	Description
Replicate Constant Tables - Object Librarian Object Use = 280	Select this checkbox to replicate Constant Tables. A new data source will be created for the remote location and the mappings for the remote environment will be activated to point to the new Constant Tables data source.
Replicate Master Tables - Object Librarian Object Use = 210 and 211	Select this checkbox to replicate Master Tables. A new data source will be created for the remote location and the mappings for the remote environment will be activated to point to the new Master Tables data source.

CAUTION: Replication must be implemented using a third-party tool.

5. Select the **Data Load** tab.


Custom Installation Plan - [Control/System Replication]
File Edit Preferences Window Help
Tools
Calendar
Calcula...
Work Center
Internal Mail
External Mail
Internet
Create Shortcut
Send Shortcut
OK Can... Dis... Abo
Links Displ... OLE ... Internet
Replication Setup
Data Load
ATLPS920 Environment Data Sources for Location Aurora
Load Control Tables
Select this checkbox to initially load the replicated Control Tables. The following version of R98403 will be launched to accomplish the task of copying control tables from base location to remote locations.
Version
XJDE0045
Edit Version (Control)
Version Search (Control)
Load Constant Tables
Select this checkbox to initially load the replicated Constant Tables. The following version of R98403 will be launched to accomplish the task of copying constant tables from base location to remote locations.
Version
XJDE0046
Edit Version (Constant)
Version Search (Constant)
Load Master Tables
Select this checkbox to initially load the replicated Master Tables. The following version of R98403 will be launched to accomplish the task of copying master tables from base location to remote locations.
Version
XJDE0047
Edit Version (Master)
Version Search (Master)

6. On the **Data Load** tab, choose from the following options to copy selected tables to the remote locations:

Field	Description
Load Control Tables	Select this checkbox to initially load the replicated Control Tables. The following version of R98403 will be launched to accomplish the task of copying Control tables from the base location to remote locations.
Load Constant Tables	Select this checkbox to initially load the replicated Constant Tables. The following version of R98403 will be launched to accomplish the task of copying Constant tables from the base location to remote locations.
Load Master Tables	Select this checkbox to initially load the replicated Master Tables. The following version of R98403 will be launched to accomplish the task of copying Master tables from the base location to remote locations.

> **Note:** To edit or change the versions of the R98403 program that copy the control tables, constant tables, and master tables, click the Edit or Search buttons next to their respective versions.

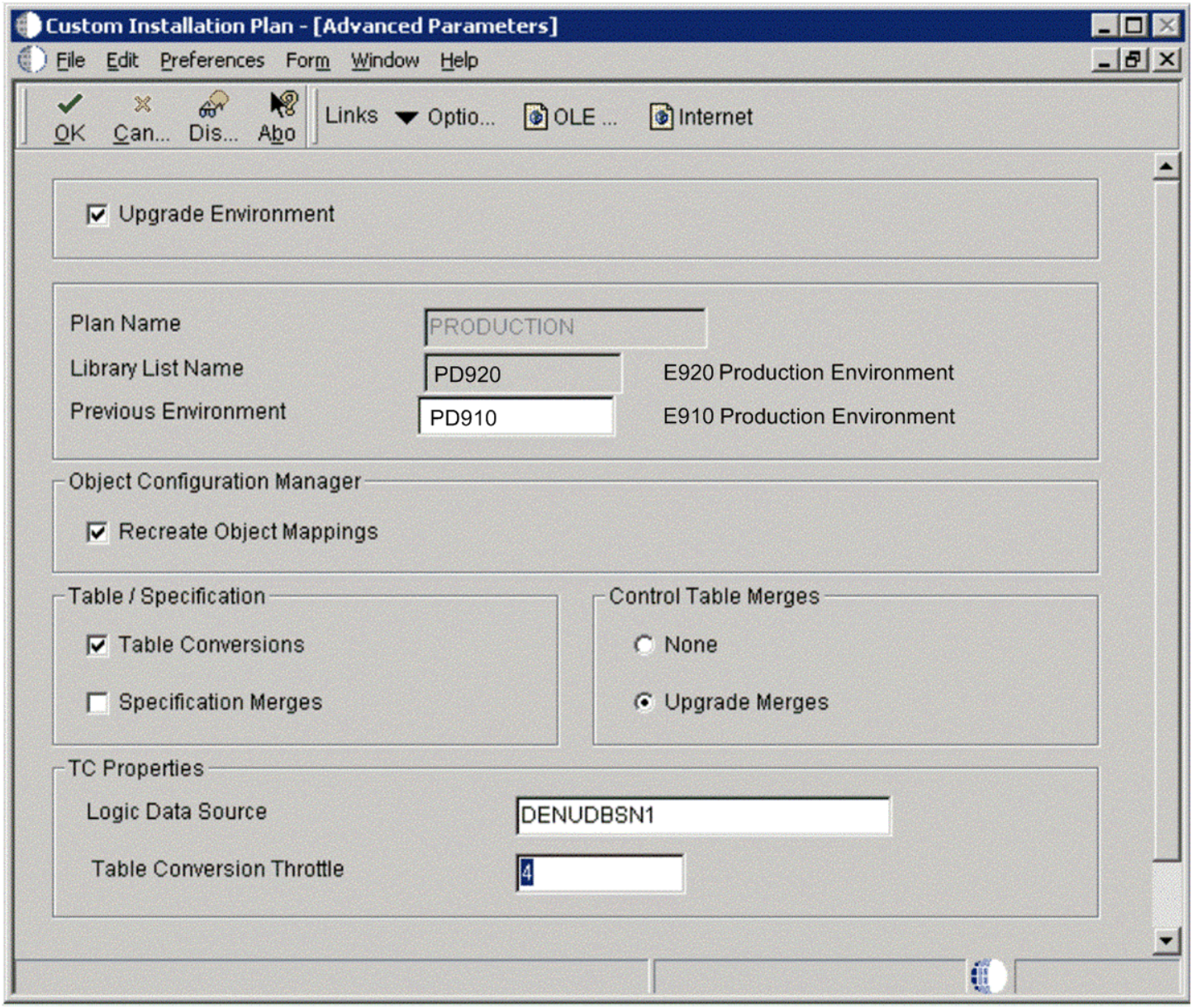
> **Note:** If you have defined multiple locations, the system will prompt you to complete sets of the Replication Setup and Data Load screens for each location.

7. Click the **OK** button.

Verifying Advanced Parameters

If you turned off **Default Advanced Parameters** on the Environment selection form, the Advanced Parameters form appears.

To verify advanced parameters:



1. On Advanced Parameters, complete these fields and turn on the following options:

Field	Description
Logic Data Source	Displays the server data source where the table conversions will run
Table Conversion Throttle	Displays the number of table conversions to be run concurrently on the server

> **Note:** The Table Conversion Workbench checks the maximum jobs for the default job queue for the logic server. It will only submit up to the number of maximum jobs on the queue to run at once. If the throttle is set higher than the queue, it uses the queue maximum number of jobs. If the queue is set higher than the throttle, it uses the throttle.

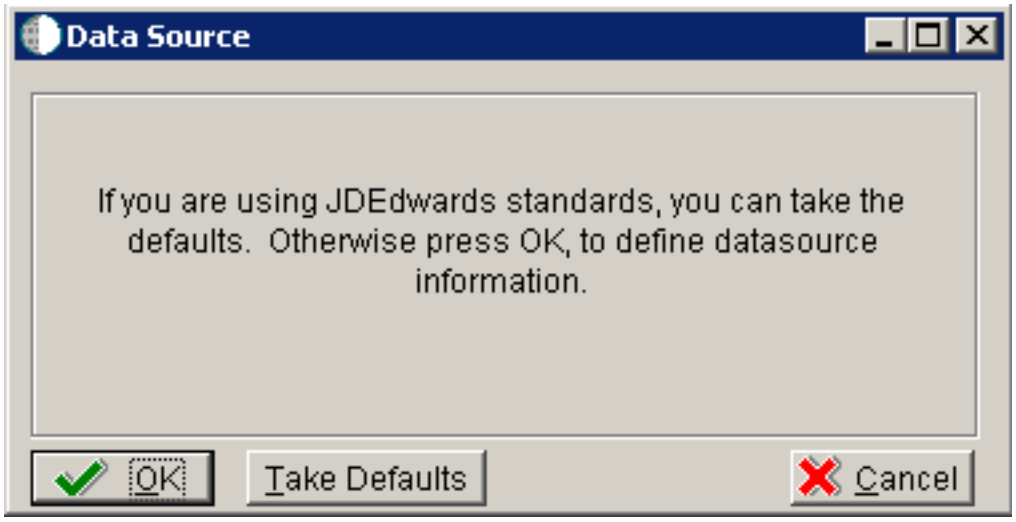
2. Click the OK button.

   If you are not installing languages, you are prompted to enter data source information.

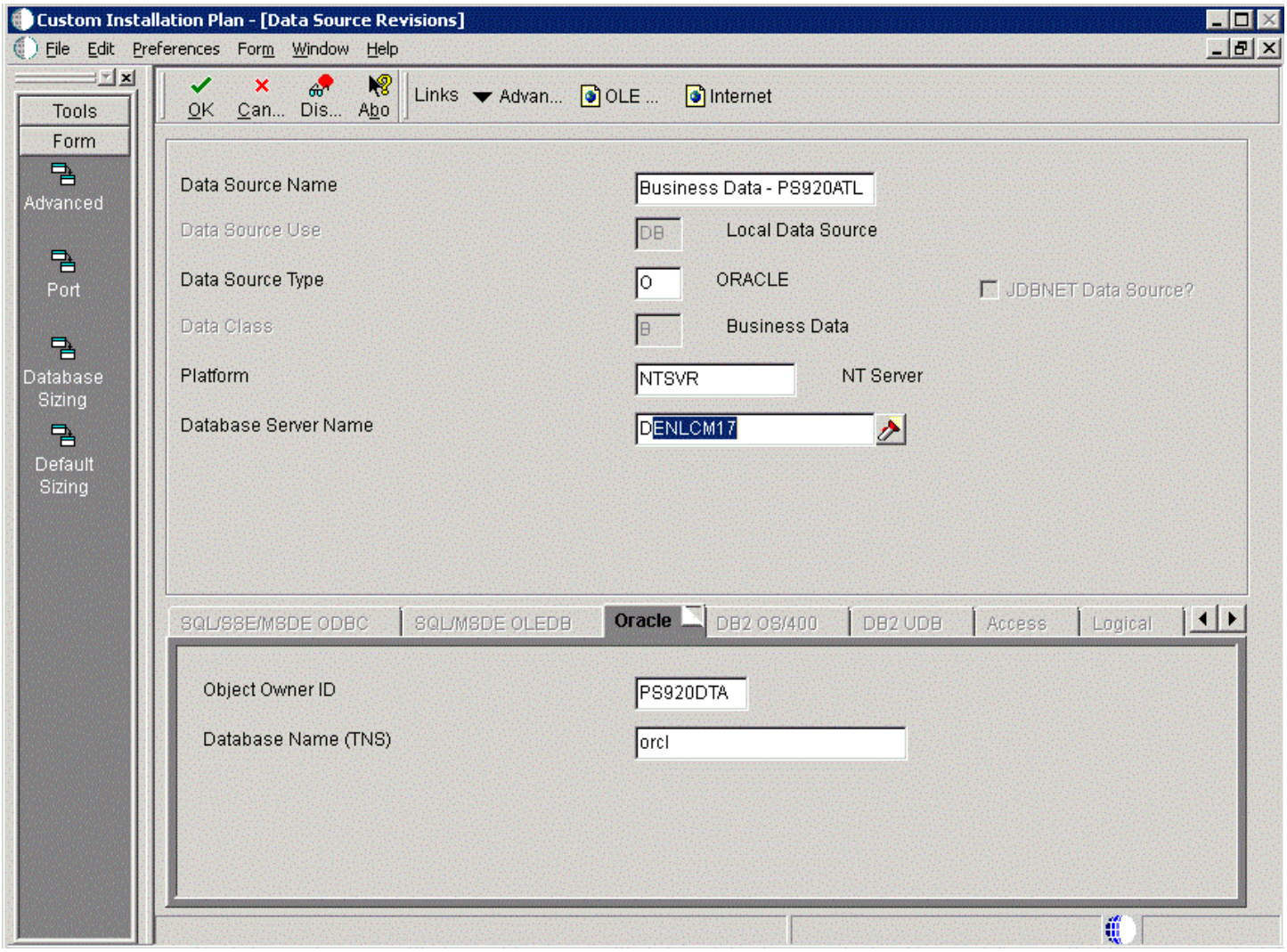
   If you turned off Default Languages on the Select Environments selection form, continue with the next task.

Setting Up Data Sources for Environment

After specifying which tables to replicate, you can set up environment data sources.

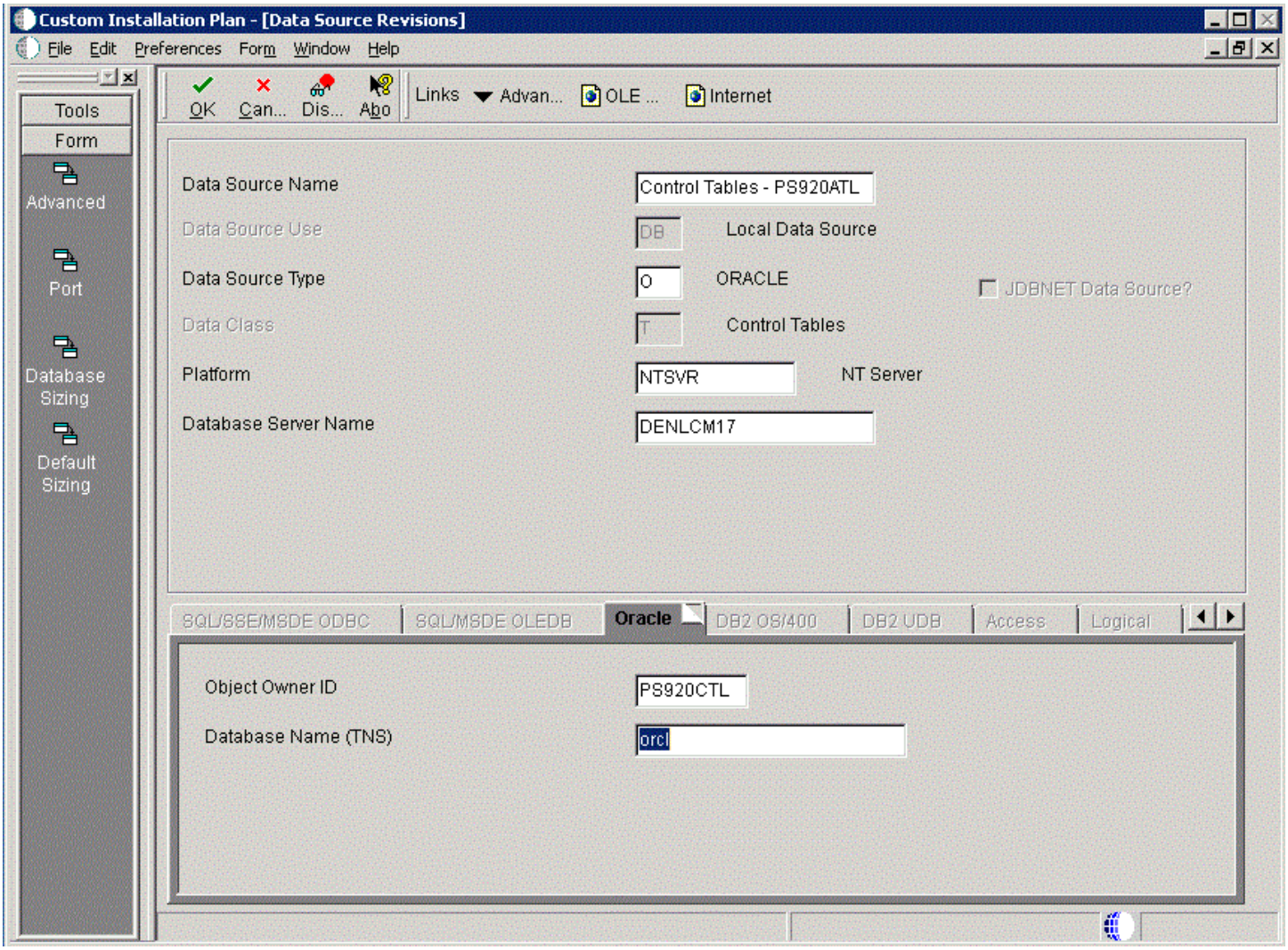


1. On Data Source, click the **OK** button.

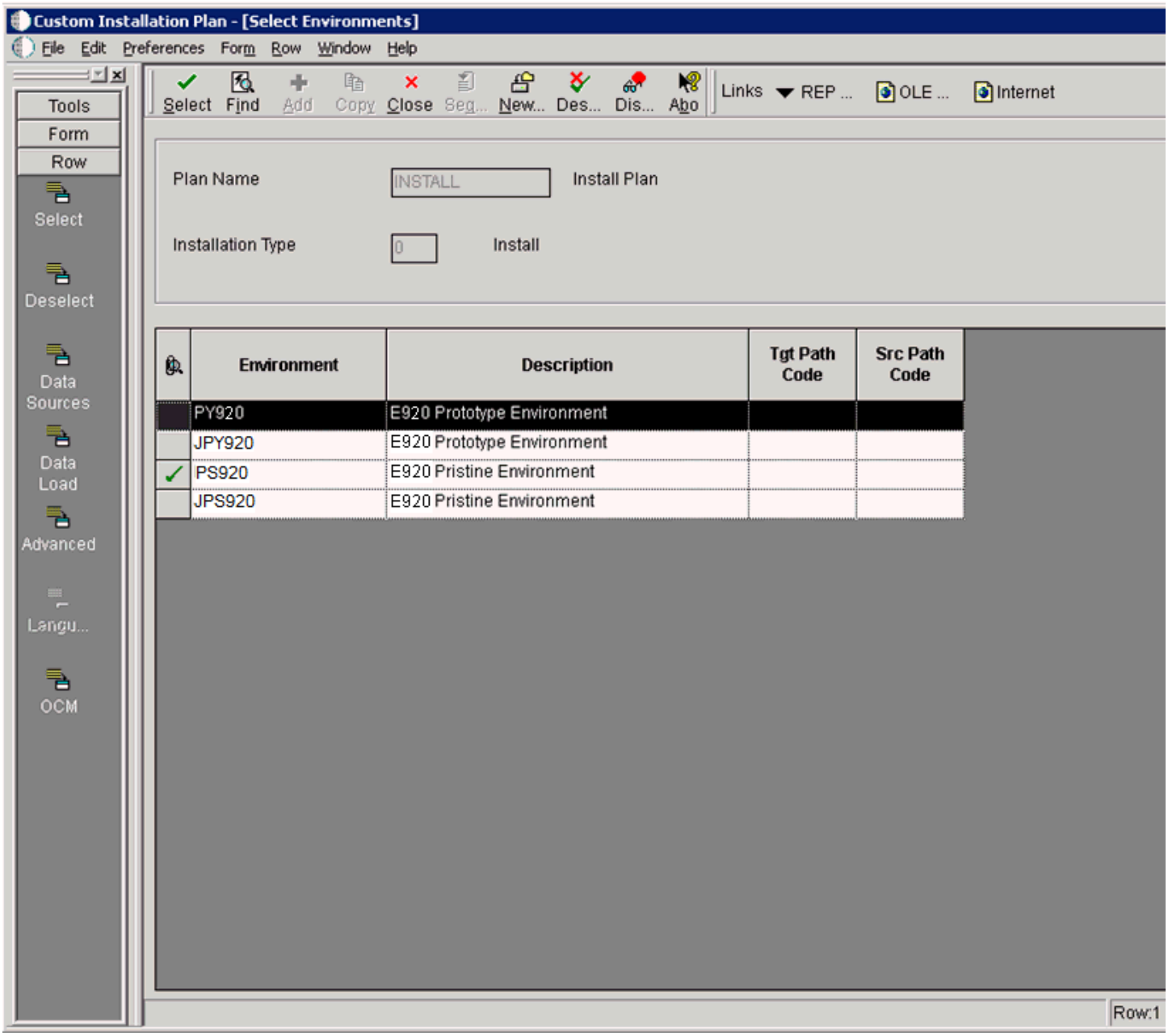

Custom Installation Plan - [Data Source Revisions]
File Edit Preferences Form Window Help
Tools
Form
Advanced
Port
Database Sizing
Default Sizing
OK Can... Dis... Abo
Links Advan... OLE ... Internet
Data Source Name
Business Data - PS920ATL
Data Source Use
DB
Local Data Source
Data Source Type
O
ORACLE
JDBNET Data Source?
Data Class
B
Business Data
Platform
NTSVR
NT Server
Database Server Name
DENLCM17
SQL/SSE/MSDE ODBC
SQL/MSDE OLEDB
Oracle
DB2 OS/400
DB2 UDB
Access
Logical
Object Owner ID
PS920DTA
Database Name (TNS)
orcl

2. On Data Source Revisions, enter the data source name for the Business Data data source that will be used by the remote location. For example, **Business Data - PS920ATL**.
3. Complete the other fields as applicable for your database and platform.

4. Click the **OK** button.


Custom Installation Plan - [Data Source Revisions]
File Edit Preferences Form Window Help
Tools
Form
Advanced
Port
Database Sizing
Default Sizing
OK Can... Dis... Abo
Links Advan... OLE ... Internet
Data Source Name
Control Tables - PS920ATL
Data Source Use
DB
Local Data Source
Data Source Type
O
ORACLE
JDBNET Data Source?
Data Class
T
Control Tables
Platform
NTSVR
NT Server
Database Server Name
DENLCM17
SQL/SSE/MSDE ODBC
SQL/MSDE OLEDB
Oracle
DB2 OS/400
DB2 UDB
Access
Logical
Object Owner ID
PS920CTL
Database Name (TNS)
orcl

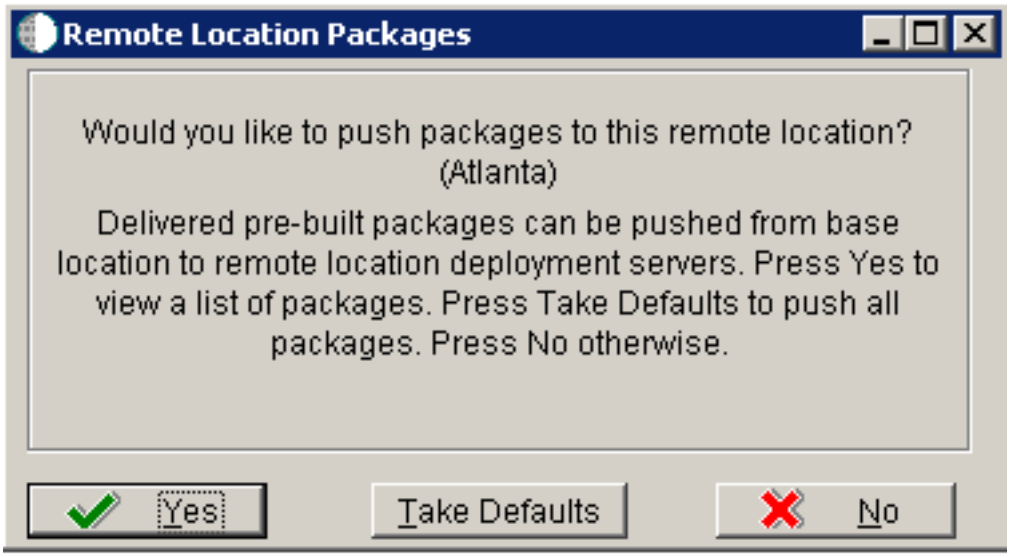
5. On Data Source Revisions, enter the data source name for the Control Tables data source that will be used by the remote location. For example, **Control Tables - PS920ATL**.
6. Complete the other fields as applicable for your database and platform.
7. Click the **OK** button.



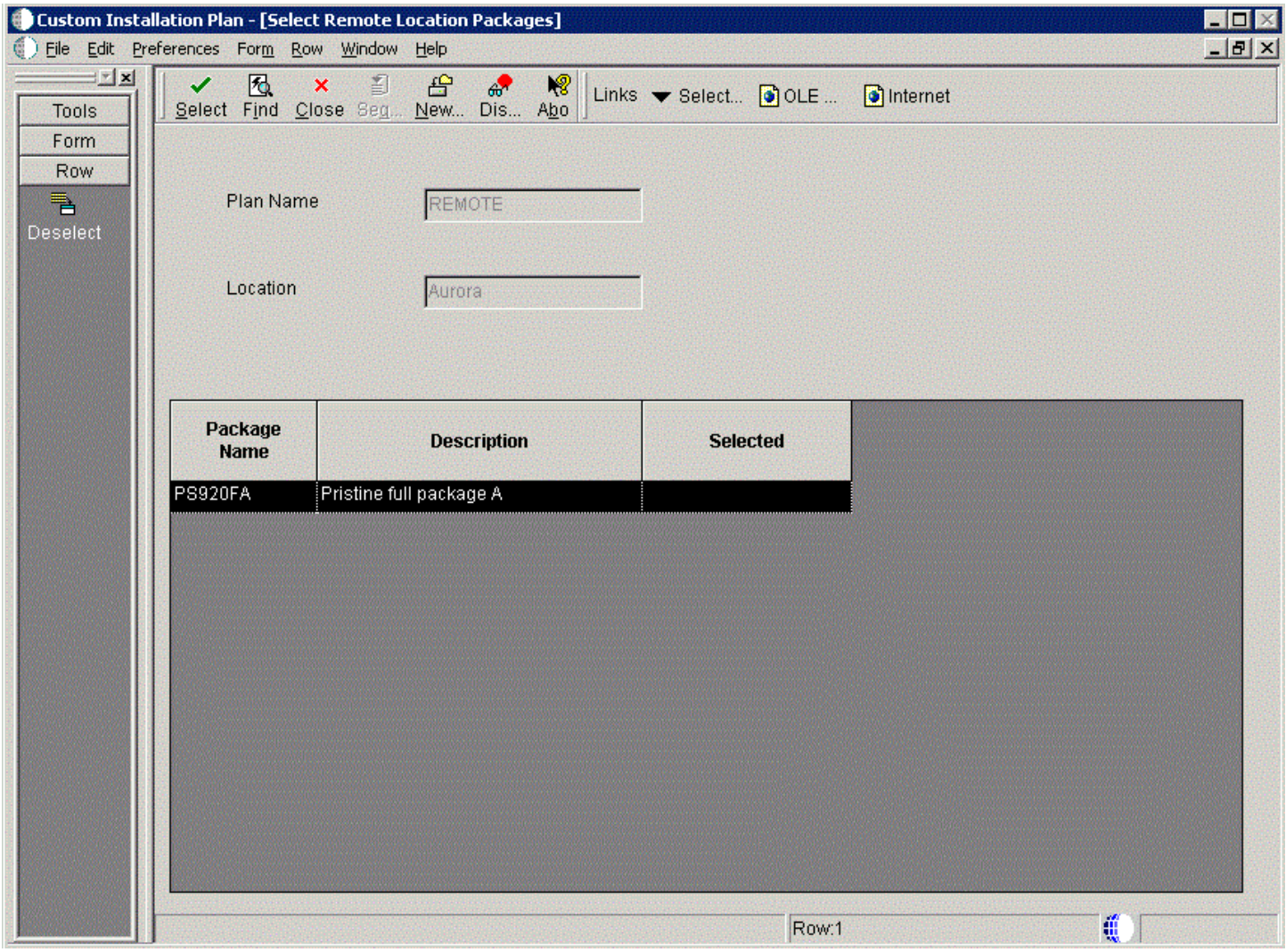
8. On Select Environments, click the **Close** button to exit the form.

Remote Location Packages

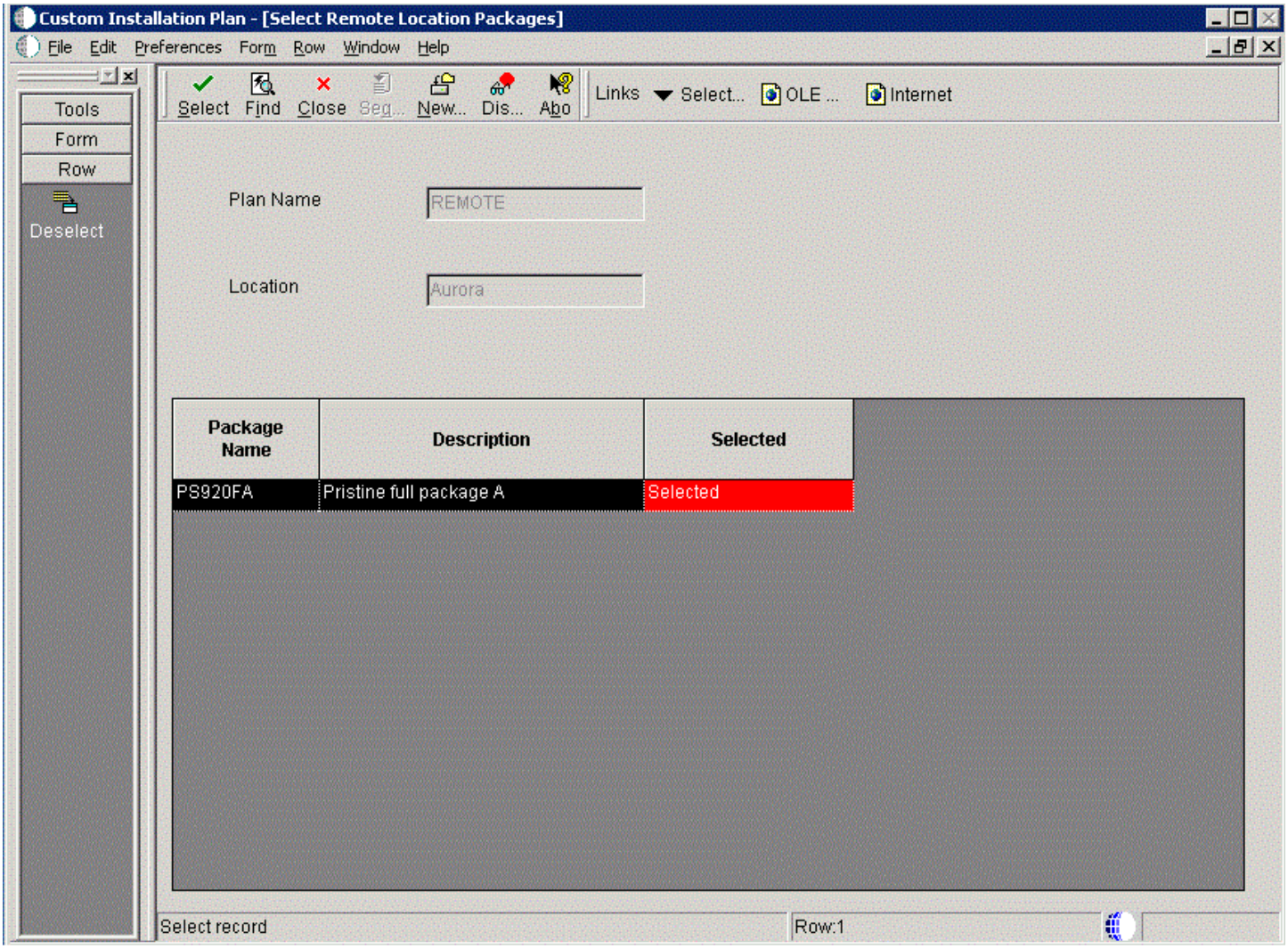
After you complete the data source setup for the environments, you can choose whether to push packages to a remote location.



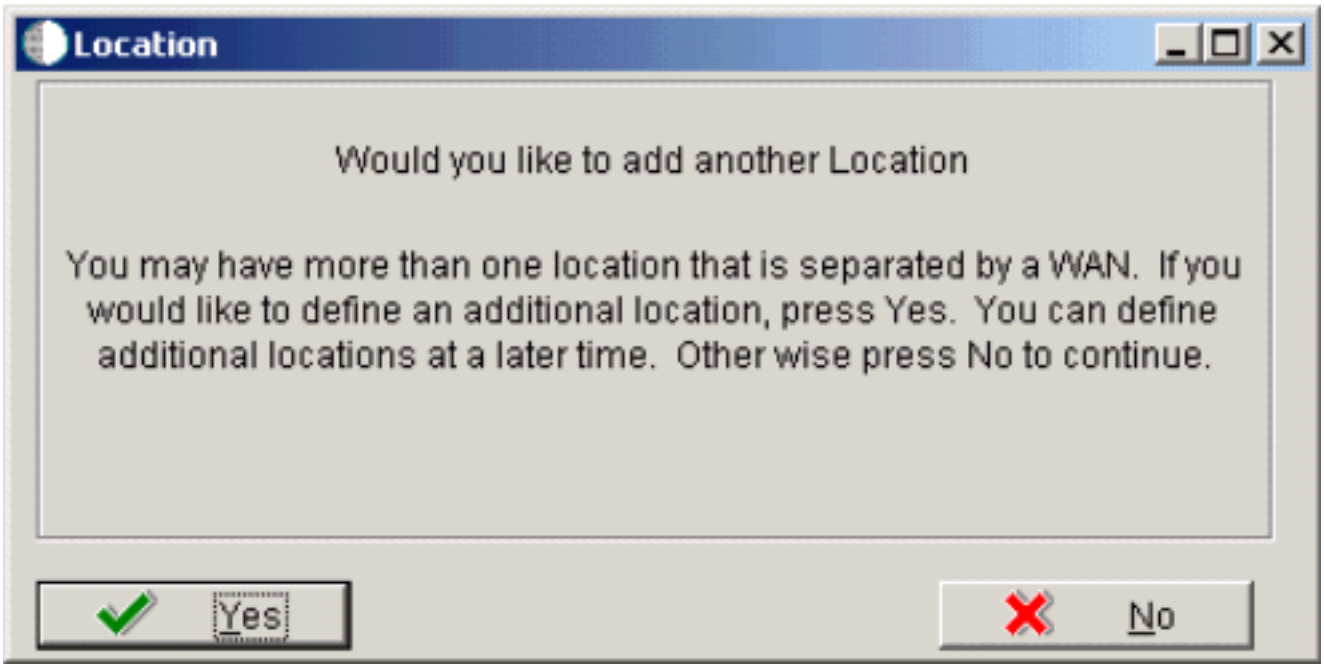
1. On Remote Location Packages, click the OK button.


Custom Installation Plan - [Select Remote Location Packages]
File Edit Preferences Form Row Window Help
Tools
Form
Row
Deselect
Select Find Close Seq... New... Dis... Abo
Links Select... OLE ... Internet
Plan Name
REMOTE
Location
Aurora
Package Name
Description
Selected
PS920FA
Pristine full package A
Row:1

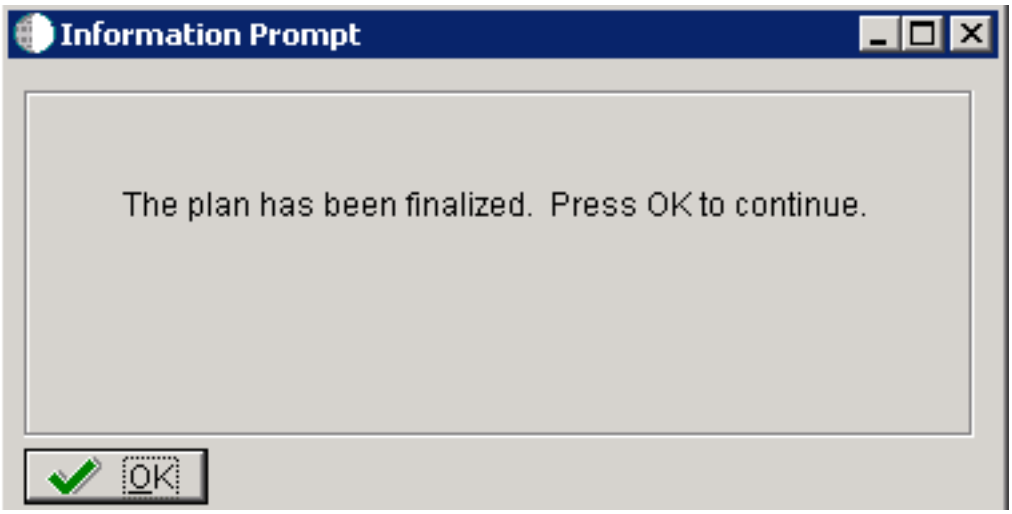
2. On Remote Location Packages, click the **Select** button to choose the highlighted package.


Custom Installation Plan - [Select Remote Location Packages]
File Edit Preferences Form Row Window Help
Tools
Form
Row
Deselect
Select Find Close Seq... New... Dis... Abo
Links Select... OLE ... Internet
Plan Name
REMOTE
Location
Aurora
Package Name
Description
Selected
PS920FA
Pristine full package A
Selected
Select record
Row:1

3. On Remote Location Packages, verify that **Selected** is displayed in the column whose heading is **Selected**.
4. Click the **Close** button.



5. On Location, click the **No** button to finalize the plan.



6. On the Information Prompt that indicates Installation Planner has concluded, click the **OK** button to exit the message box and initiate the Planner Validation Report.
    - If the processing option default was selected, Planner Validation Report automatically prompts you to run this report.
    - If the processing option default was not selected, click **Validate** on the tree view of your plan to initiate the Planner Validation Report.

Finalizing the Installation Plan

Installation Planner finalizes your installation plan automatically. The Information Prompt message appears to let you know that the installation plan is finalized.

When the plan is finalized:

- The status is set to 20. This value means that several adjustments to OCM mappings and tables were made according to your plan.
- The following tables are now updated:

  Release Master table (F00945)

  Path Code Master table (F00942)

  Create OCM (F986101)

  Package Plan table (F98404)

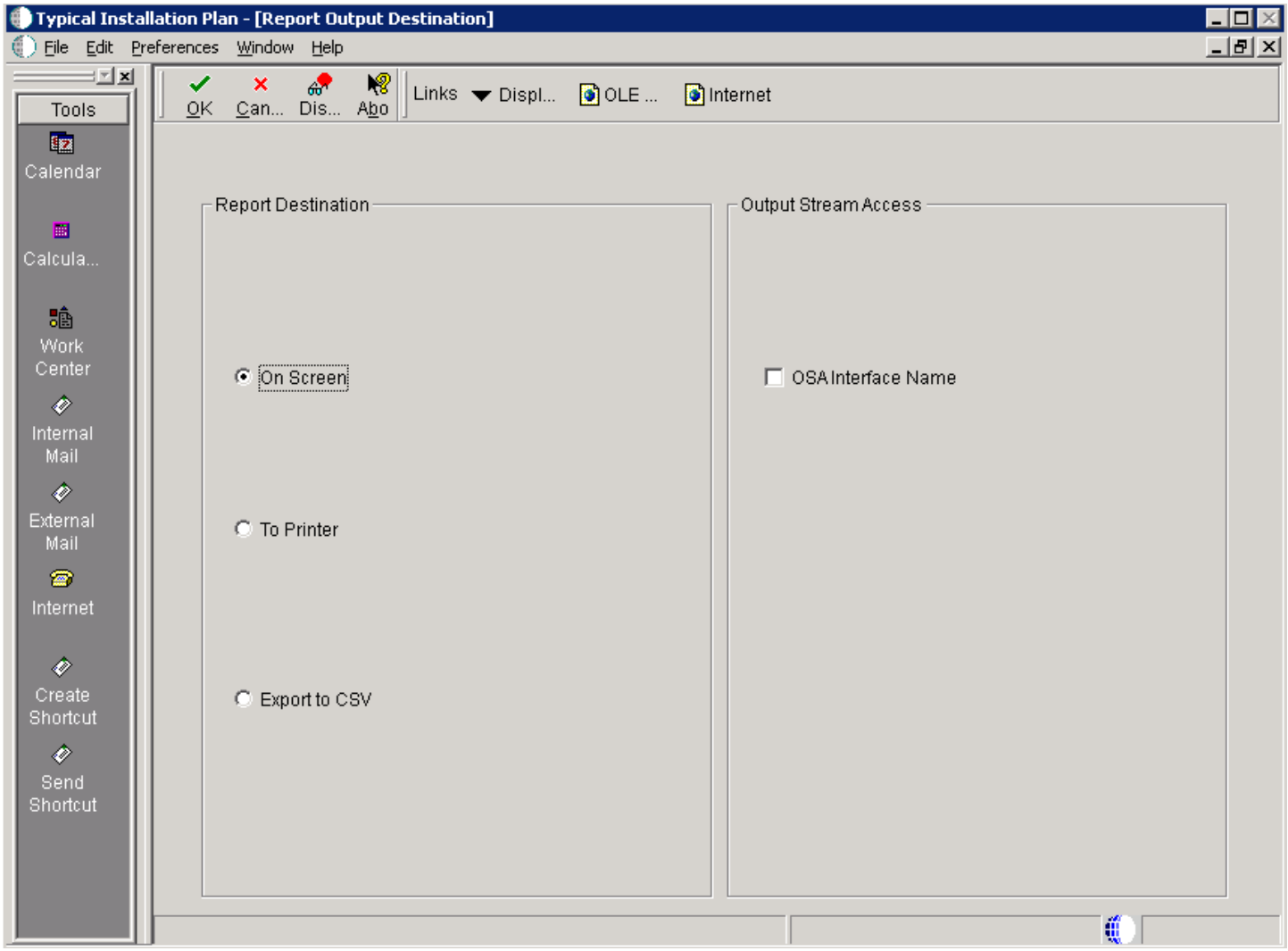
  Machine Detail table (F9651)

  Table Conversion Scheduler (F98405)

  Language table (F984031) - if you are installing an alternate language

Concluding the Planner Validation Report

To conclude the planner validation report:



1. On Report Output Destination, select the radio button for **On Screen or To Printer**.

2. Click the **OK** button.
3. Review the report to confirm that all records were validated.

   For more information about *Installation Planner Validation Report (R9840B)*, refer to *Working with Reports*.
4. On Work With Installation Plans, click Expand to review the plan you created.

See Also

- A separate chapter in this guide entitled: *Adding a Server to an Existing Configuration*
- A separate chapter in this guide entitled: *Creating a Language-Only Installation Plan*

18 Adding a Server to an Existing Configuration

Adding a Server to an Existing Configuration

This section contains the procedures for adding additional servers to your configuration. Use these procedures only if you have already defined and run your initial installation plan and set up your environments.

This section discusses:

- Assumptions about Adding a Server to an Existing Installation Plan
- Starting Installation Planner
- Entering a Plan Description
- Entering a Plan Location
- Selecting Additional Server Types
- Entering Deployment Server Information
- Specifying an Enterprise Server
- Entering HTML Web Server Information
- Entering Data Server Information
- Entering Shared Data Source Information
- Setting Up Environments
- Setting Up Environment Data Sources
- Finalizing the Installation Plan
- Concluding the Validation Planner Report
- Configuring Additional Servers

Assumptions about Adding a Server to an Existing Installation Plan

This table outlines assumptions for adding a server to an existing Installation Plan phase as a whole.

Personnel	Installer
Logon Status	On the Deployment Server, logged on as user JDE with the database password for user JDE, in the planner environment.
Prerequisites	Verify that the Deployment Server is installed and the *Release 9.2* directory is shared.

Personnel	Installer
	In order to run EnterpriseOne on an additional server, you must deploy JD Edwards EnterpriseOne to the server using either: • Server Manager • Platform Pack installer
Concurrent Tasks	None.

Starting Installation Planner

CAUTION: In order to run EnterpriseOne on an additional server, you must deploy JD Edwards EnterpriseOne to the server using either:

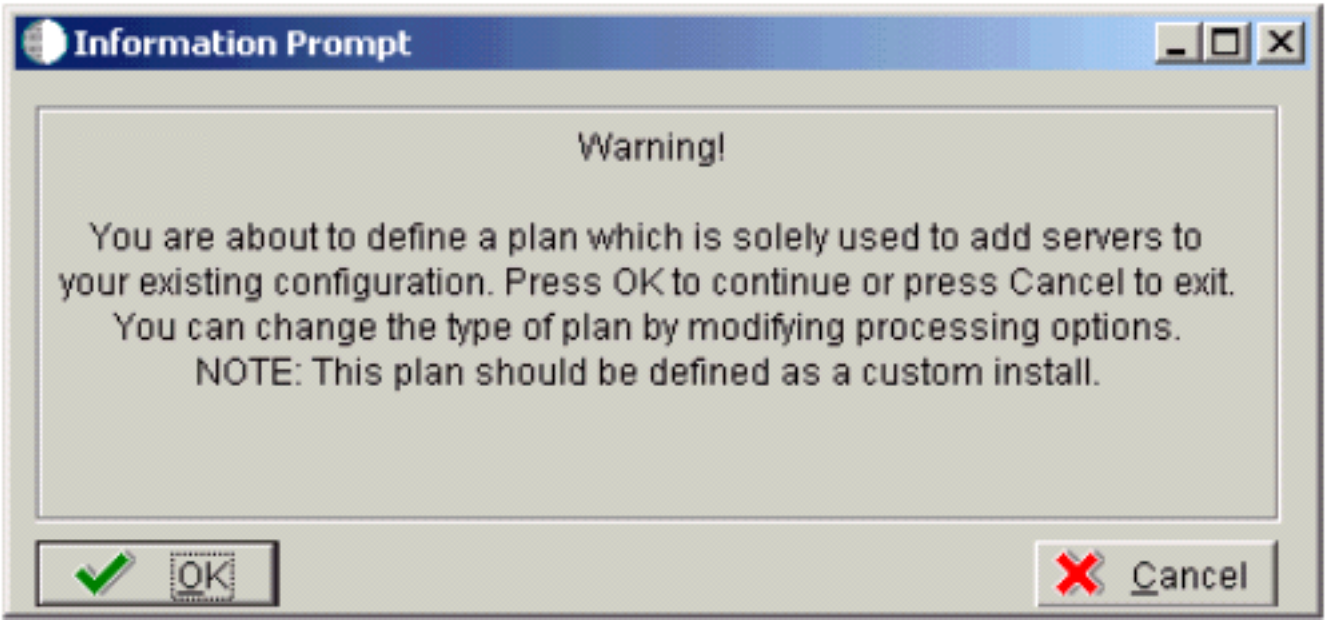
- Server Manager
- Platform Pack installer

Begin your installation plan by logging on to *Release 9.2* and starting Installation Planner.

To start the Installation Planner:

1. Log on to *Release 9.2* as user JDE with the database password for user JDE.
2. Access the planner environment (*JDEPLAN*).
3. From the System Installation Tools menu (GH961), double-click Add-on Servers Plan.
4. On Work with Installation Plans, click Add.

   Release 9.2 displays the following warning:



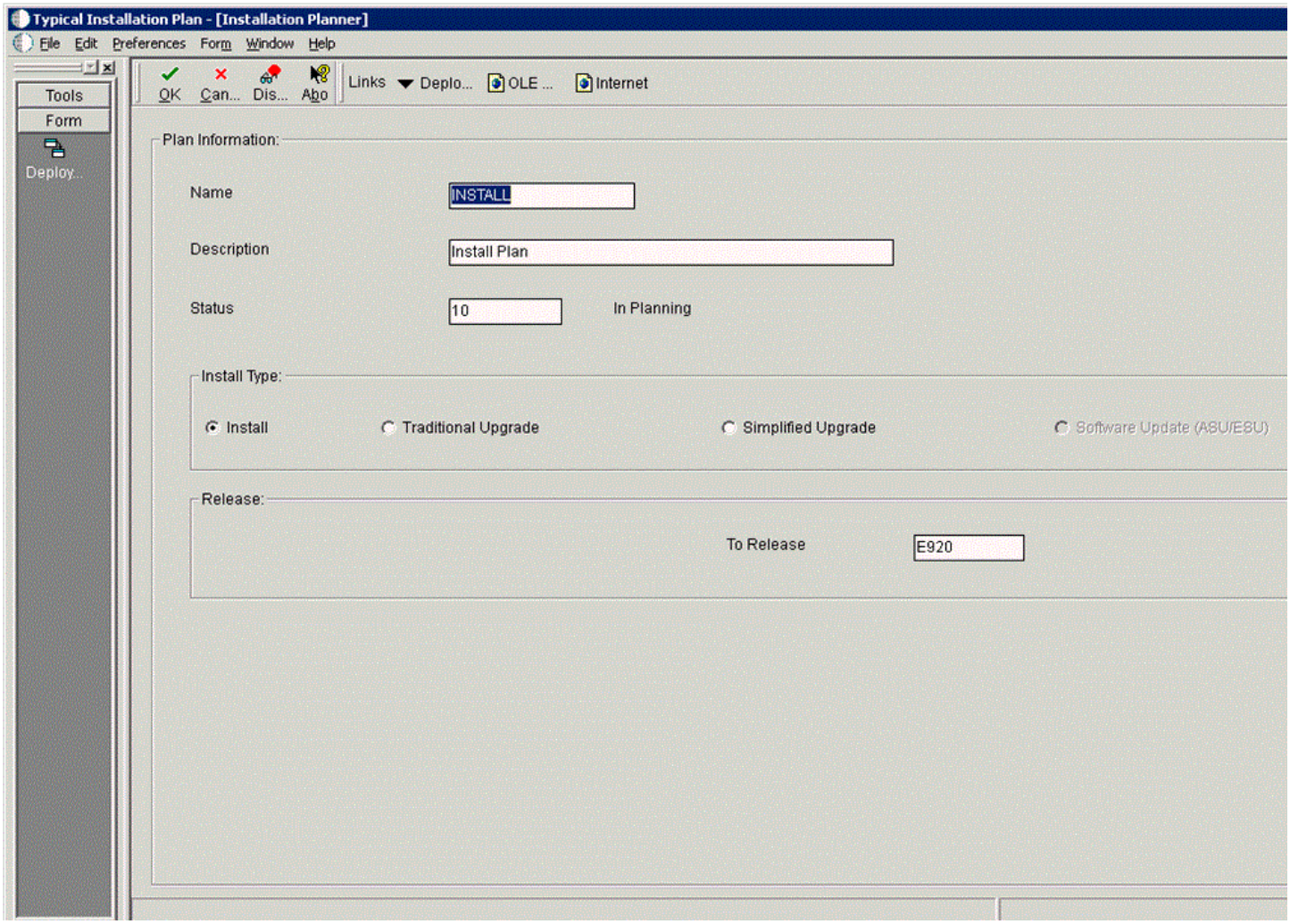
5. Click OK.

   The Installation Planner form appears.

Entering a Plan Description

After starting Installation Planner, enter basic plan information, such as plan name and description.

To enter a plan description:



1. On Installation Planner, complete the following fields:

- *Name*

  Enter the name of your installation plan.
- *Description*

  Enter the description of your installation plan.
- *Status*

  Select 10 as the status of your installation plan.
- *To*

  Verify that the release number is *E920* .

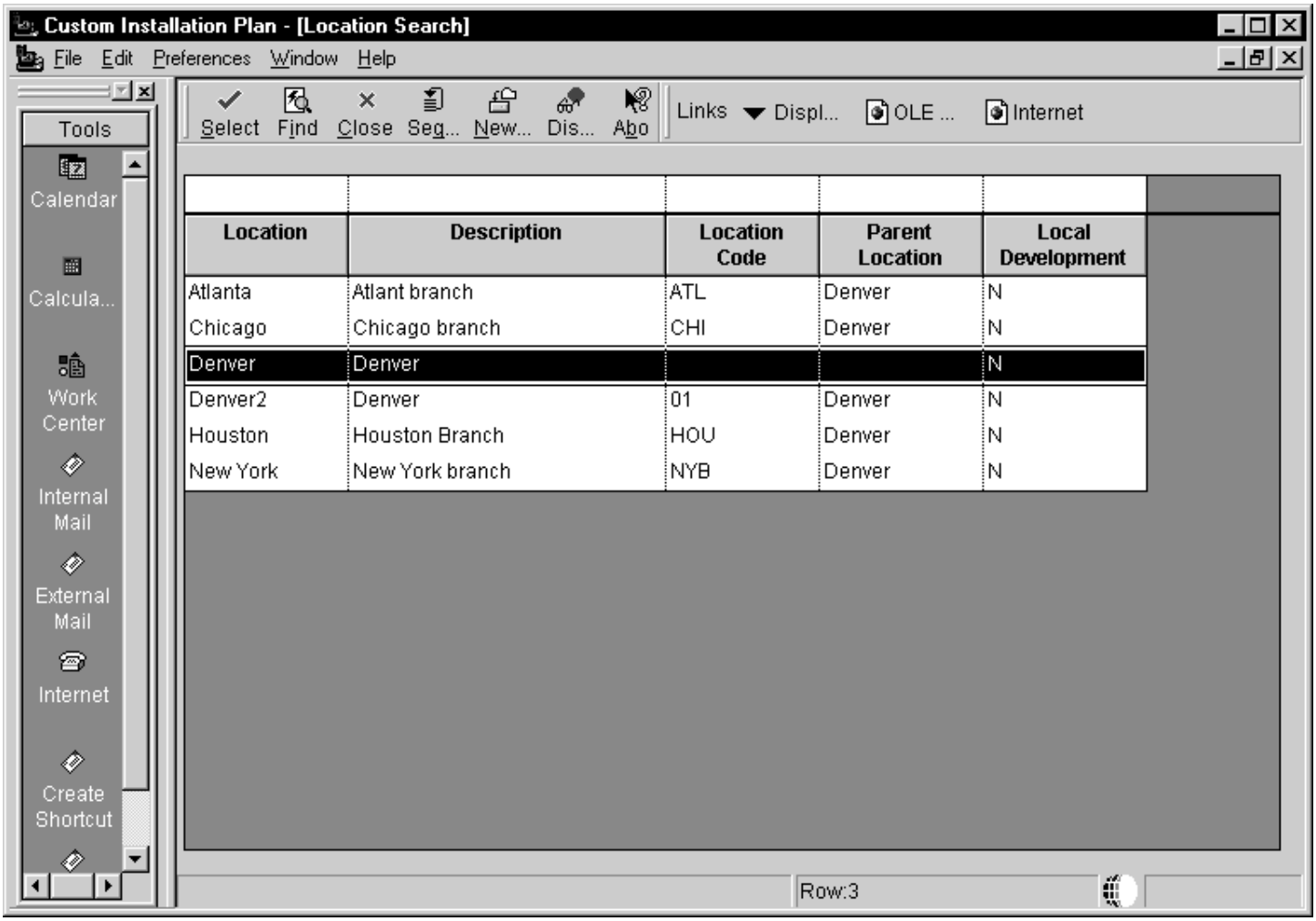
2. Click OK.

   The Location Search form appears.

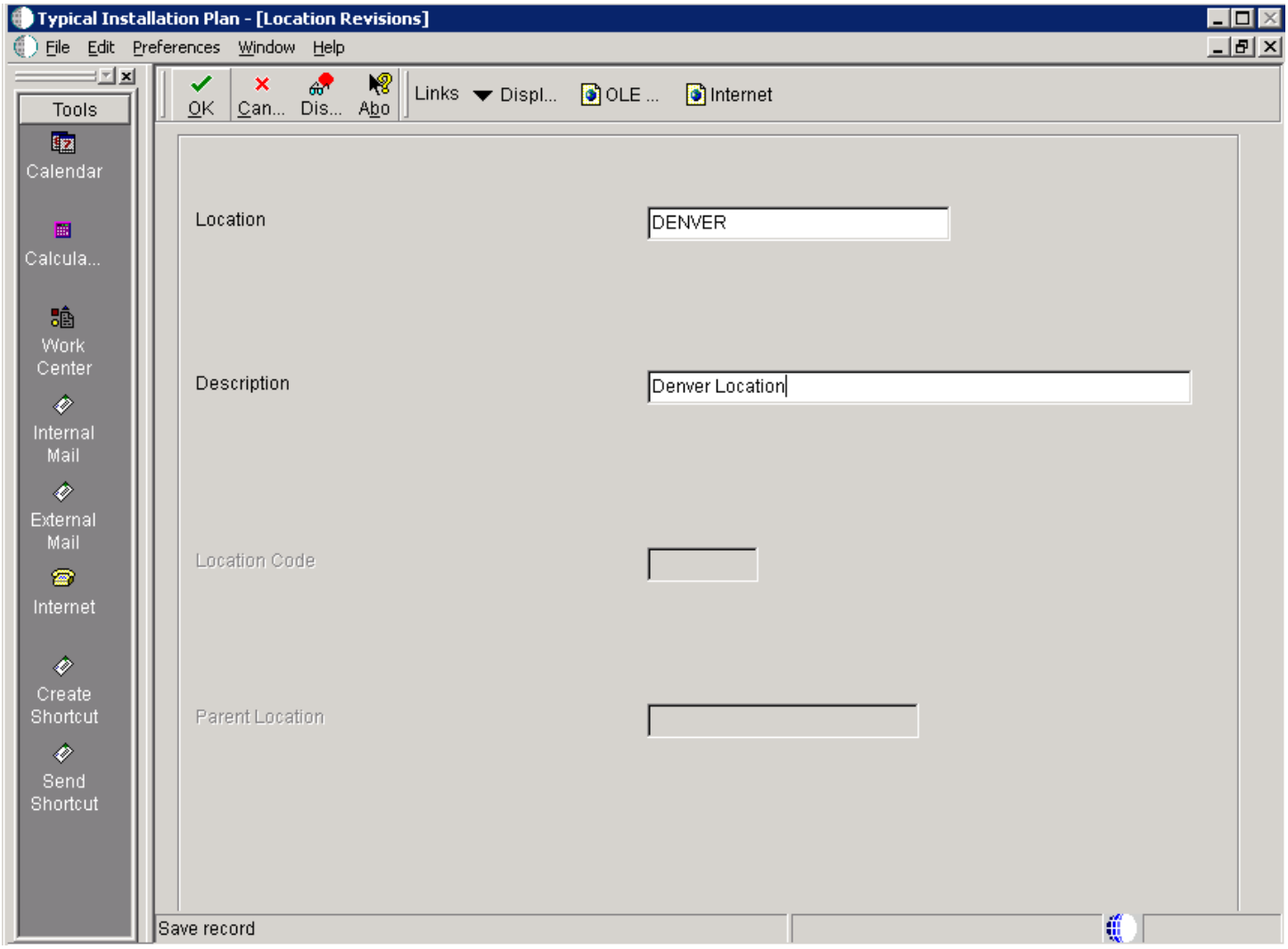
Entering a Plan Location

Once basic plan installation information is entered, you must choose an existing plan location. For most instances, choose the location defined during your base installation.

To enter a plan location:



1. On Location Search, choose a location and click Select.

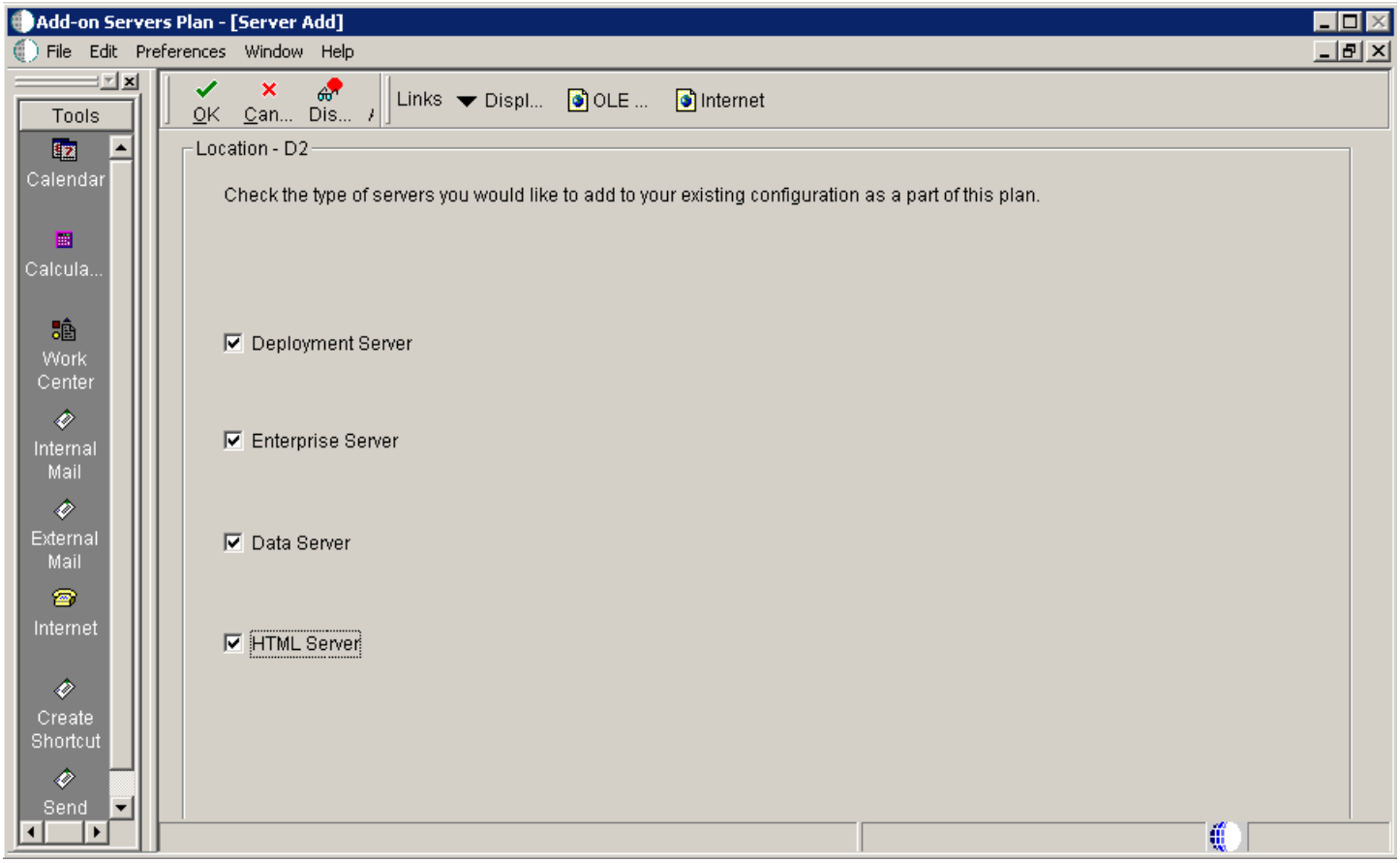

Typical Installation Plan - [Location Revisions]
File Edit Preferences Window Help
Tools
Calendar
Calcula...
Work Center
Internal Mail
External Mail
Internet
Create Shortcut
Send Shortcut
OK
Can...
Dis...
Abo
Links
Displ...
OLE ...
Internet
Location
DENVER
Description
Denver Location
Location Code
Parent Location
Save record

2. On Location Revisions, click OK.

Selecting Additional Server Types

Once a plan location is specified, specify the types of servers you want to add to your installation plan.

To select additional server types:



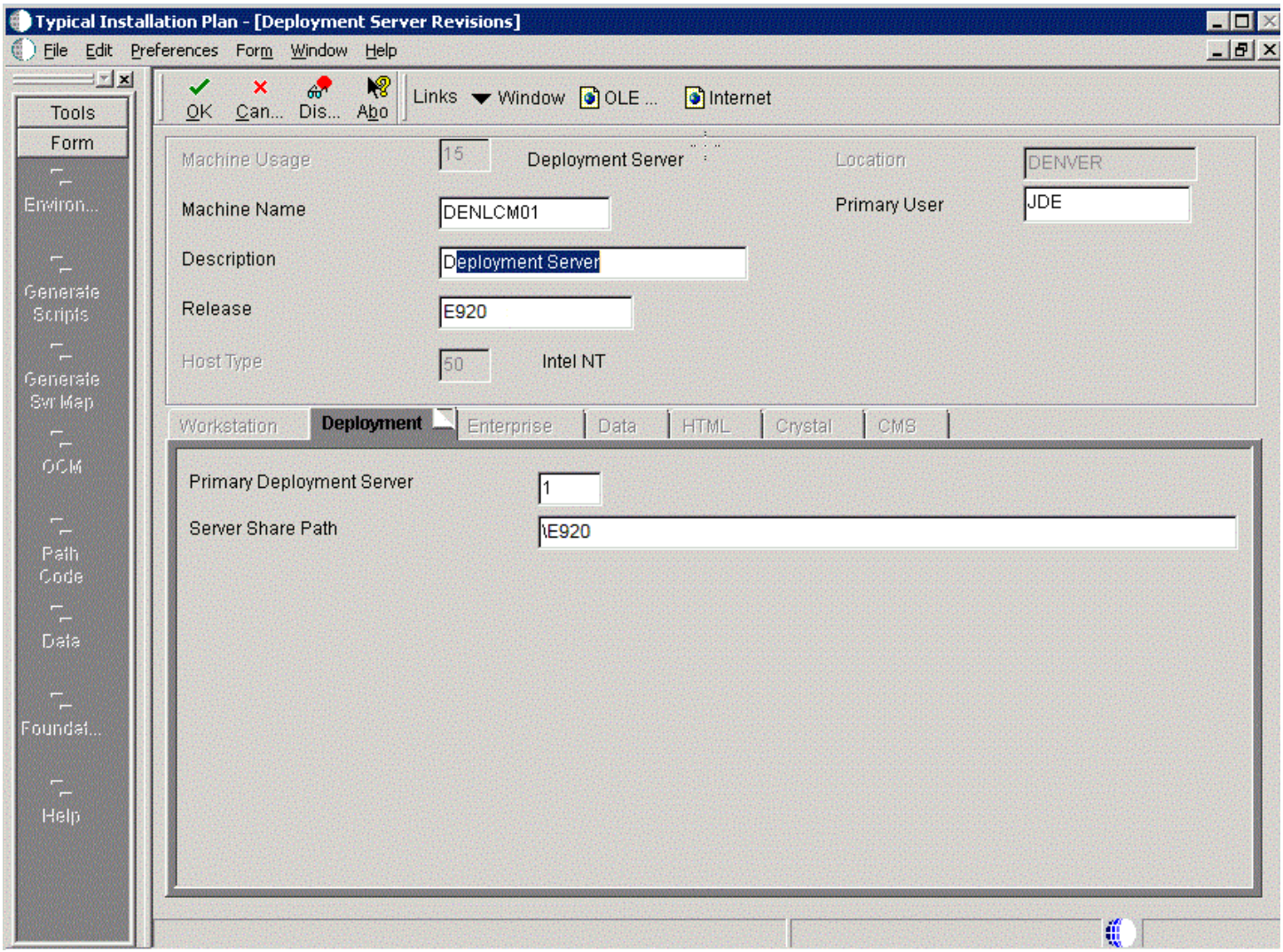
1. On Server Add, check the types of servers that you want to add to your configuration.
2. Click OK.

   A Server Revisions form appears in the order listed on the Server Add form for each type of server that you chose.
3. Continue with the relevant sections that follow.

Entering Deployment Server Information

When choosing to add an additional Deployment Server to your plan, the Deployment Server Revisions form appears.

To enter Deployment Server information:



1. On Deployment Server Revisions, complete the following fields:

Field	Description
Machine Name	Enter the name of your additional Deployment Server. The name is case sensitive, should not exceed 15 characters, and should not contain any special characters.
Description	Enter a description of the machine.
Release	Enter *E920* .
Location	Displays the system-provided default value chosen for this plan.
Primary User	This identifies the user to whom email is sent when a package is deployed. The default for Primary User is The default value for Primary User.

2. On the Deployment tab, verify or complete the following fields:

Field	Description
Primary Deployment Server	This field indicates the hierarchy of the servers. The default value for a secondary Deployment Server is **0**.
Server Share Path	Enter the server share path where you installed *Release 9.2* on your Deployment Server. Verify that this path matches your version of the release; for example, for *Release 9.2* , the server share path is\ ***E920*** .

3. Click OK.

> **Tip:** If you enter invalid information into a tab field, a stop sign icon appears next to the tab name, such as Deployment Server. For more information about the error, click on the stop sign icon in the bottom right-hand corner of the form.

4. You are prompted to add another Deployment Server.
   - To add another Deployment Server, click Yes.

     Repeat Entering Deployment Server Information.
   - To continue with the additional server plan, click No.

     Continue with the relevant sections that follow.

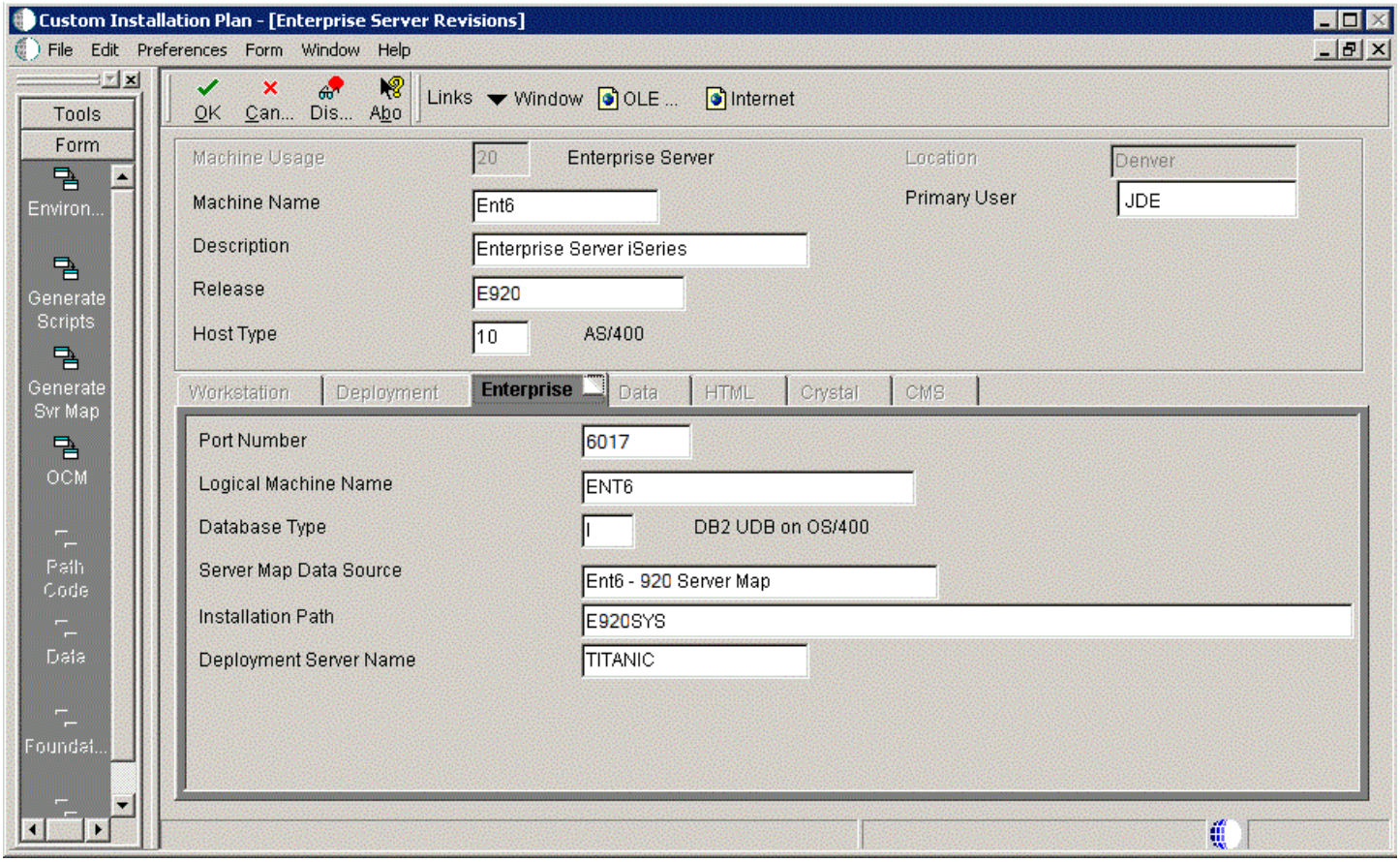
Specifying an Enterprise Server

This section discusses:

- *Entering Enterprise Server Information*
- *Entering Enterprise Server Data Source Information*

Entering Enterprise Server Information

To enter the base information for the Enterprise Server that you use in this plan:



1. On Enterprise Server Revisions, complete or verify the following fields:

Field	Description
Machine Usage	Displays the default value of 20 to indicate that this is an Enterprise Server.

Field	Description
Machine Name	The name of the primary Enterprise Server. The name is case sensitive and should not contain any special characters. Because the machine name is used to create the Server Map datasource name, and because the Platform Pack Installer does not restrict you from entering a machine name that results in a datasource name greater than 30 characters; if the machine name for the Enterprise Server is longer than 13 characters, the resulting datasource name will be longer than the allowed 30 characters. For example, if your machine name is 15 characters (A23456789012345), the base datasource name input into the Planner would be: **`A23456789012345 - 920 Server Map`**. **Note:** The field in table F98611 is a hard restriction; the field only allows 30 characters. The actual field size cannot be modified or changed. When the Planner runs it truncates the value to 30 characters because that is the restriction in the F98611 table. The Platform Pack does not truncate the value when it builds the **`JDE.INI`** for the Enterprise Server. Therefore, any value greater than 30 characters will result in a mismatch between the **`JDE.INI`** and the F98611 table. That is, using the previous example, the **`JDE.INI`** would have the full length value **`A23456789012345 - 920 Server Map`** (which is 32 characters) while the F98611 populated by the Planner would have a value of **`A23456789012345 - 920 Server M`**. To remedy, you could do any one of the following: o Manually modify values in table F98611 to match the truncated value in the **`JDE.INI`** file. o Ensure that the value is not truncated by limiting the datasource name to 30 characters (this would mean limiting the machine name for the Enterprise Server to 13 characters). o Manually truncate the value in the F98611 table (for example, **`A23456789012345 - 920 Svr Map`**. In any case, you **must** ensure that the values for Server Map datasource names in the F98611 table exactly match those in the **`JDE.INI`** file on the Enterprise Server.
Description	Enter a description of the machine.
Release	Enter the release number to which this plan applies, or use the visual assist button to choose one from the list, such as *E920* .
Host Type	Click the visual assist button and choose the type of Enterprise Server that you are adding to the plan, such as *IBM i* .
Location	Enter the default location chosen for this plan.
Primary User	Enter the user to whom email is sent when a package is deployed. The default for Primary User is JDE.

Field	Description

2. On the Enterprise tab, complete these fields:

Field	Description
Port Number	Displays the default value for this field, which is supplied the **JDE.INI**. Change the port number for this Enterprise Server to a unique value, for example, *6017* .
Logical Machine Name	Displays the system-supplied default value when you enter the host type. The name is case sensitive, should not exceed 15 characters, and should not contain any special characters.
Database Type	Enter the type of database that you want to use for data sources on the Enterprise Server. Value is: I is for *IBM i* Access
Server Map Data Source	Displays the system-supplied default value when you enter the host type.
Installation Path	Verify that the default value is the installation directory path to which you want to install *Release 9.2* on the Enterprise Server. Make sure the value is specific to your version of the release. For example, for *Release 9.2* the default path is: **\JDEdwards\PPack\ *E920SYS*** This is the system library.
Deployment Server Name	Using the visual assist button, choose the name of the Deployment Server to which this Enterprise Server is attached. The system provides a default value for this field, but you can change it.

3. Click OK.

   A message box appears prompting you to enter custom data sources or take the default data sources. Proceed to *Entering Shared Data Source Information*.

Entering Enterprise Server Data Source Information

After specifying Enterprise Server information, enter the data source information for the Enterprise Server you will use in this plan. The server data source holds the system configuration files that enable the server to run UBEs.

This section discusses:

- *Specifying Custom or Default Data Source Information*
- *Verifying Custom Server Map Data Source Information*
- *Adding another Enterprise Server*

Specifying Custom or Default Data Source Information

You are prompted to enter custom data sources or take the default data sources for the Enterprise Server you just added. Choose one of the following options:

- To enter custom data sources, click **OK**.

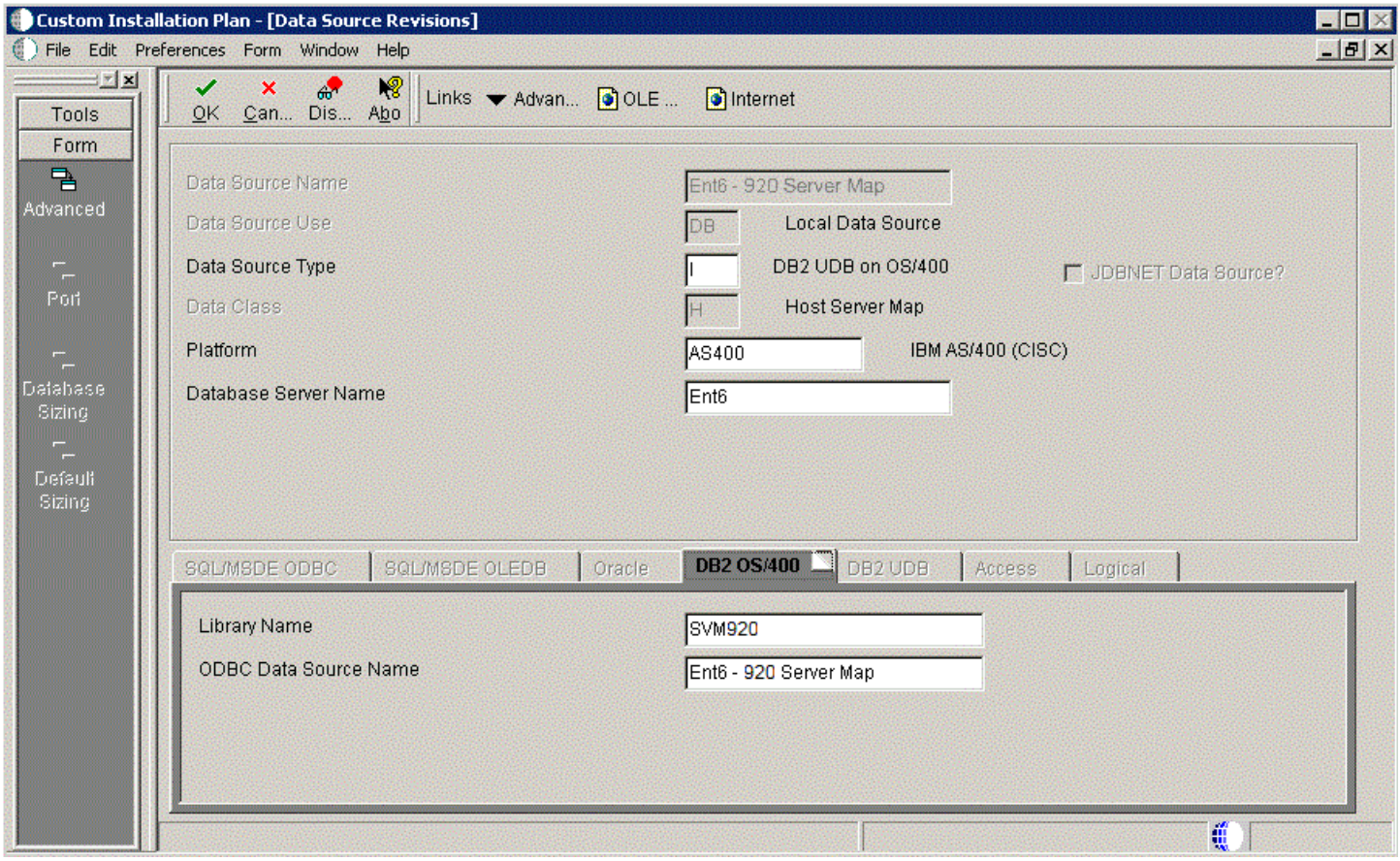
  Skip to *Verifying Custom Server Map Data Source Information*.

- To accept default data sources, click **Take Defaults**.

  This option limits your customization choices.

Verifying Custom Server Map Data Source Information

To verify custom Server Map data source information:



1. On Data Source Revisions, verify your Server Map data source information.

   Tip: Default data sources are configured as completely as possible. However, when you run Installation Planner, you might need to modify some data source information to reflect your system-specific configuration.

2. While defining your plan, some fields were changed to reflect the previous release values.

Change the following fields:

Data Source Type	Enter *I* for *IBM i* Access.
Data Library Name	Enter *SVMrelease*, where *release* is the release to which you are installing, for example, *E920* .

3. Click OK.

Adding another Enterprise Server

On the prompt to add another Enterprise Server, choose one of the following options:

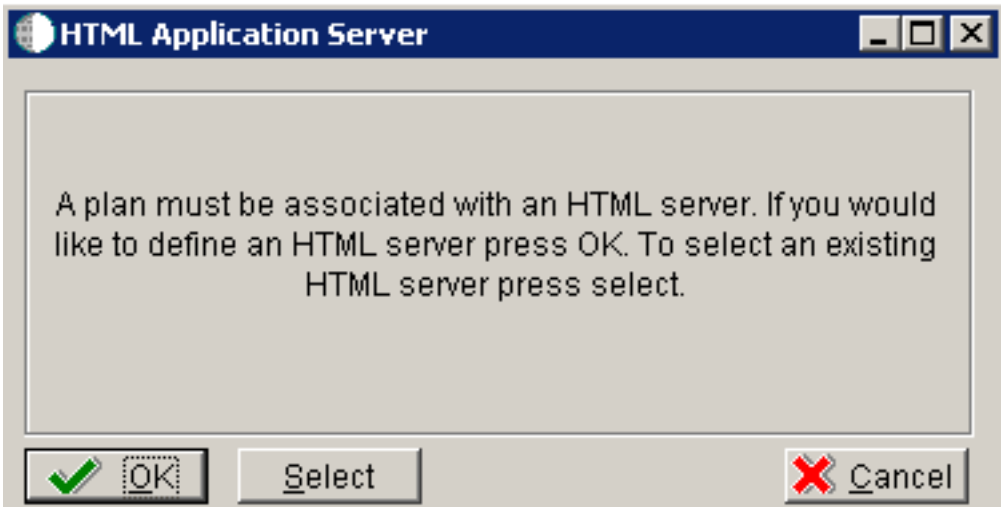
- To add another Enterprise Server, click Yes.

  Repeat processes, starting with *Entering Enterprise Server Information*.
- To continue with Installation Planner setup, click No.

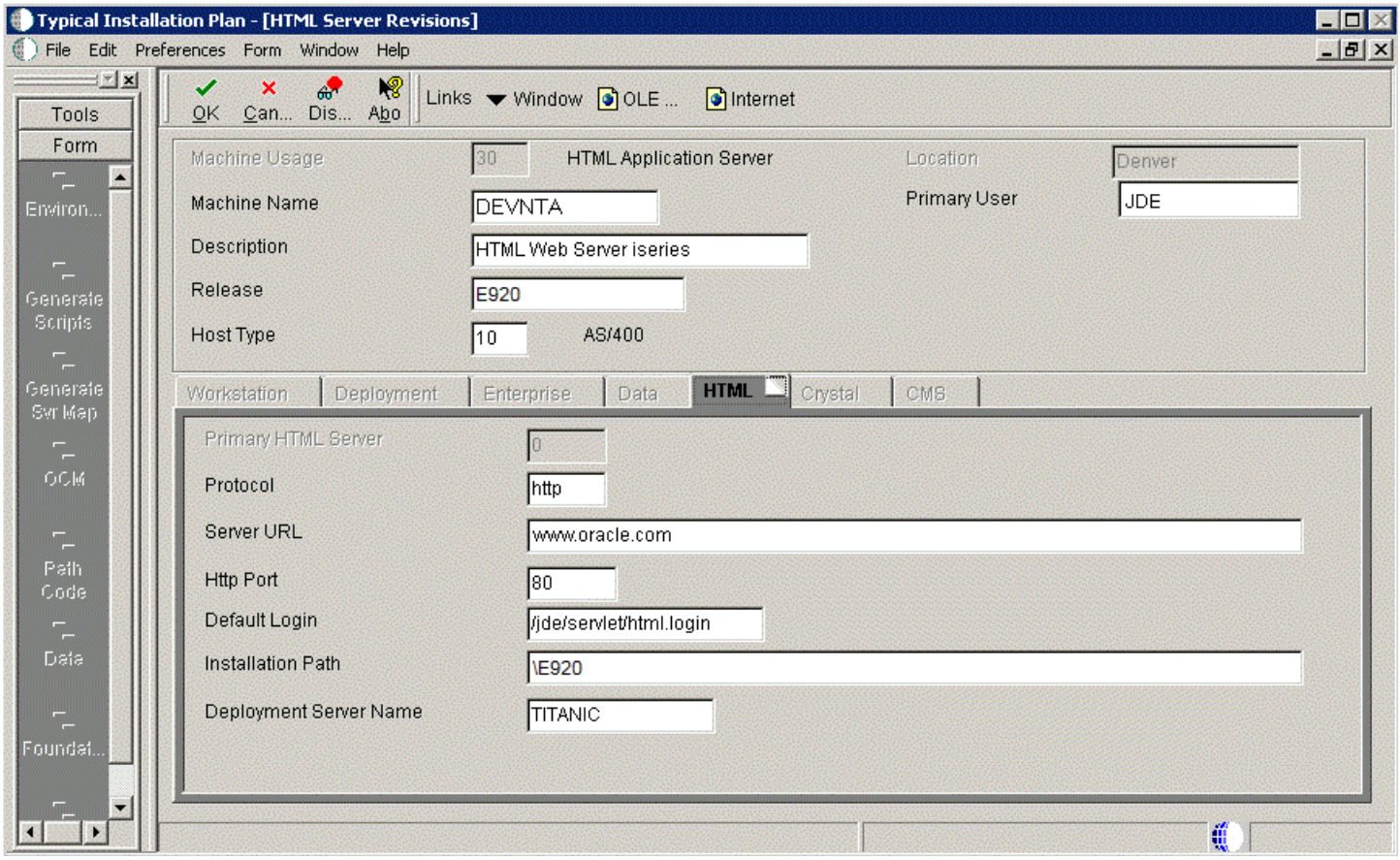
  The Machine\Server Types form appears.

Entering HTML Web Server Information

To enter HTML Web Server information:



1. On the HTML Application Server dialog, click OK to continue entering HTML Web Server information, or click Select to select an existing HTML Web Server.



2. On HTML Server Revisions, complete these fields:

Field	Description
Machine Usage	The default value of 30 indicates that this is a HTML Web Server.

Field	Description
Machine Name	Enter the name of your HTML Web Server. The name is case sensitive, should not exceed 15 characters, and should not contain any special characters.
Description	Enter a description of the HTML Web Server machine.
Release	Enter *E920* to indicate the release number that you are installing.
Host Type	The default value of 50 specifies the server type as Intel NT. Select the correct server type.
Location	The location chosen for this plan appears in this field by default.
Primary User	The user to whom an email is sent when a package is deployed. The default for Primary User is listed in the ***jde.ini*** .

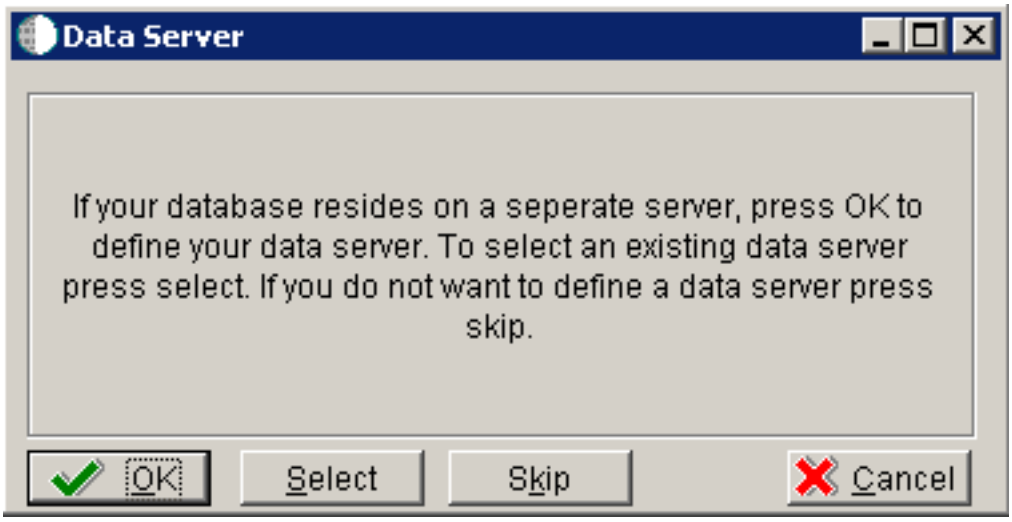
3. On the HTML tab, complete these fields:

Field	Description
Primary HTML Server	When the system code generates an email message with a web shortcut pointing to a form, the web shortcut generated points to the "Primary" HTML Web Server. Only one of all the HTML Web Servers defined in installation planner can be defined as primary ("1").
Protocol	This is the protocol used by the HTML Web Server. Valid values are **http** or **https**.
Server URL	This is the Domain Name System (DNS) host name of the HTML Web Server. For example: www.oracle.com
HTTP Port	This is the port number the HTML Web Server is listening to. For HTTP, the typical port number is 80. For HTTPS, the typical port number is 443. **Note:** You can choose to implement a HTML Web Server using a different port number.
JDENET Listen Port	This is the port on which the JDENET communications protocol communicates with the JD Edwards EnterpriseOne Enterprise Server. The value is dependent on the release of JD Edwards EnterpriseOne.

Field	Description
	For JD Edwards EnterpriseOne *Release 9.2* , the value is *6017* .
Default Login	Defines how shortcuts to a web form are generated by the system code. Values are either a reserved value or an explicit servlet name. Reserved values are: o **Standard** The URL generated will point to a servlet on the Primary HTML Web Server. o **Redirector** The URL generated will point to redirector in the Primary HTML Web Server, and redirector will point to a servlet on another HTML Web Server for load balancing. The servlet name to use is generated by the system. o Explicit Servlet Name The user can specify an explicit servlet name in this field. In this case, the redirector functionality cannot be used. The URL generated will point to the specified servlet in the Primary HTML Web Server. Usage of Explicit servlet name is for backward compatibility only. You should not use it unless you have a direct need.
Installation Path	Enter the installation directory path to which you are installing *Release 9.2* on your HTML Web Server. Make sure this is specific to your version of the release, and also the platform and application server on which your HTML Web Server is running. For default paths, refer to the applicable platform- and application server-dependent version of the *JD Edwards EnterpriseOne HTML Web Server Reference Guide* (*JD Edwards EnterpriseOne Transaction Server Reference Guide* , *JD Edwards EnterpriseOne Transaction Server Guide for UNIX using Oracle WebLogic Server* , *JD Edwards EnterpriseOne Transaction Server Reference Guide for Microsoft Windows using WebSphere* , *JD Edwards EnterpriseOne Transaction Server Reference Guide* , *JD Edwards EnterpriseOne Transaction Server Reference Guide for IBM i using WebSphere* . Otherwise, you must obtain this value from the HTML Web Server machine itself, or its administrator.

4. Click OK.
5. To add another HTML Web Server, click Yes and repeat steps 1 through 4 to define another HTML Web Server.

Entering Data Server Information



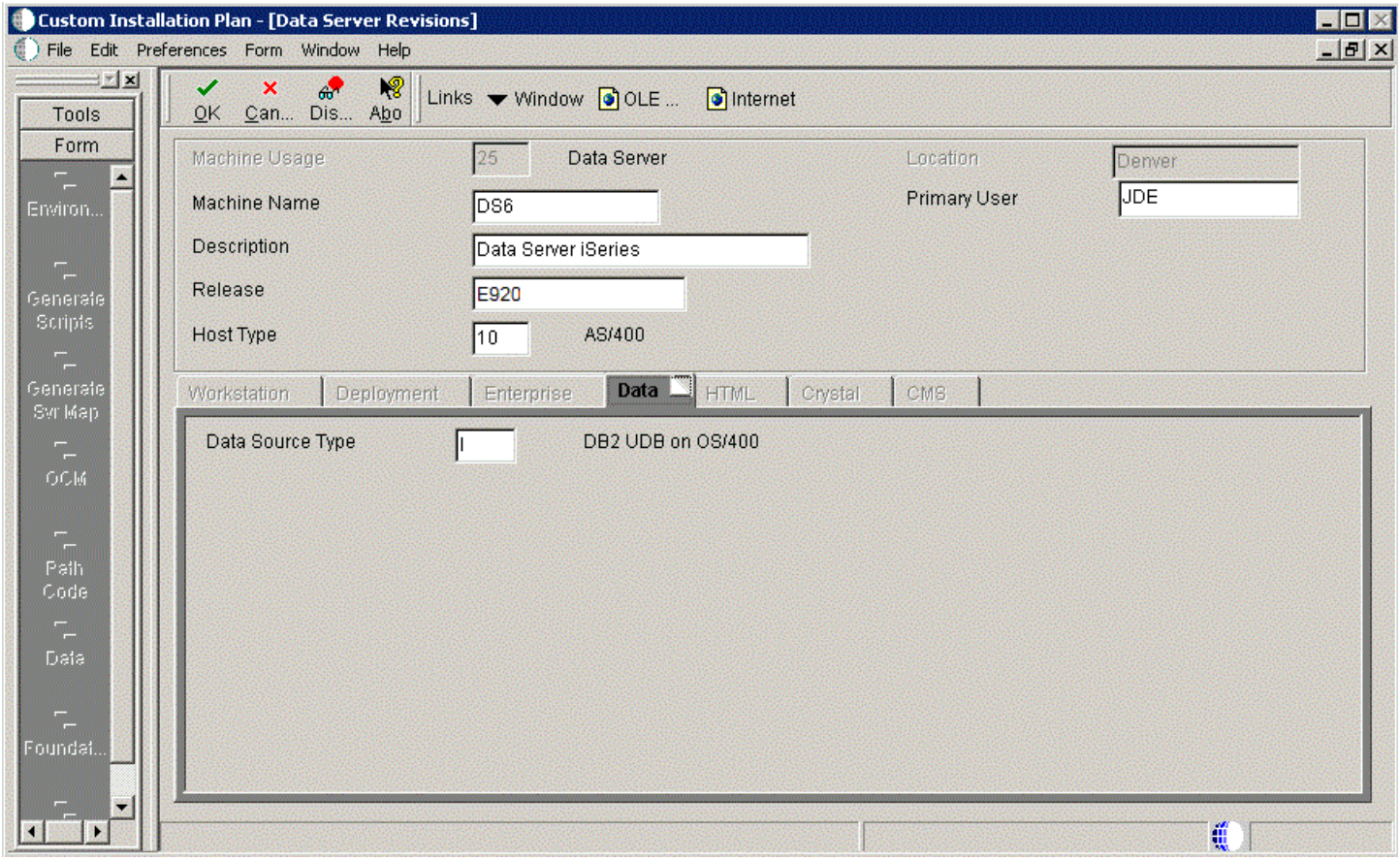
1. On Data Server, choose one of these options:

   - OK

     If your database resides on a separate server, choose click OK to continue entering unique Data Server information.
   - Select

     Click this option to select an existing Data Server.
   - Skip

     Click this option if you do not want to define a Data Server. Continue with the Planner using the environment selection in Step 6 of this task.



2. On Data Server Revisions, complete these fields:

Field	Description
Machine Usage	The default value of 25 indicates that this is a Database Server.

Field	Description
Machine Name	Enter the name of the Database Server where your central objects reside. If you are using the *IBM i* to store your central objects, enter the name of this server. The name is case sensitive, should not exceed 15 characters, and should not contain any special characters.
Description	Enter a description of the Database Server machine.
Release	Enter the release number you are installing, for example, *E920* .
Host Type	Select the type of Database Server that you are adding to the plan. Values are: o *10* — *IBM i* o *25* — Sun Solaris o *30* — RS\6000 o *35* — Linux o *50* — Microsoft Windows (Intel) o *80*— Client - Microsoft Windows o *90* — Client - Microsoft Windows
Location	The Installation Planner populates this field by default, based on previous selections.
Primary User	The user to whom an email is sent once a package is deployed. The default for Primary User is JDE.

3. On the **Data** tab, complete the following field:

Field	Description
Data Source Type	Choose the type of data source. For example: o I - *IBM i*

4. Click OK.
5. To add another Data Server, click Yes and repeat steps 1 through 4 to define another Data Server.
6. On Data Source, click OK to continue entering unique shared data source information, or click Take Defaults to select the default data for the shared data sources.
7. On Location, select Yes to add another location, or click No to continue with Installation Planner.

Entering Shared Data Source Information

This section discusses:

- *Specifying (Custom or Default) Shared Data Source Setup Information*
- *Verifying the Data Source for Data Dictionary*
- *Verifying the Object Librarian Data Source*
- *Verifying the Data Source*
- *Verifying the System Data Source*

Specifying (Custom or Default) Shared Data Source Setup Information

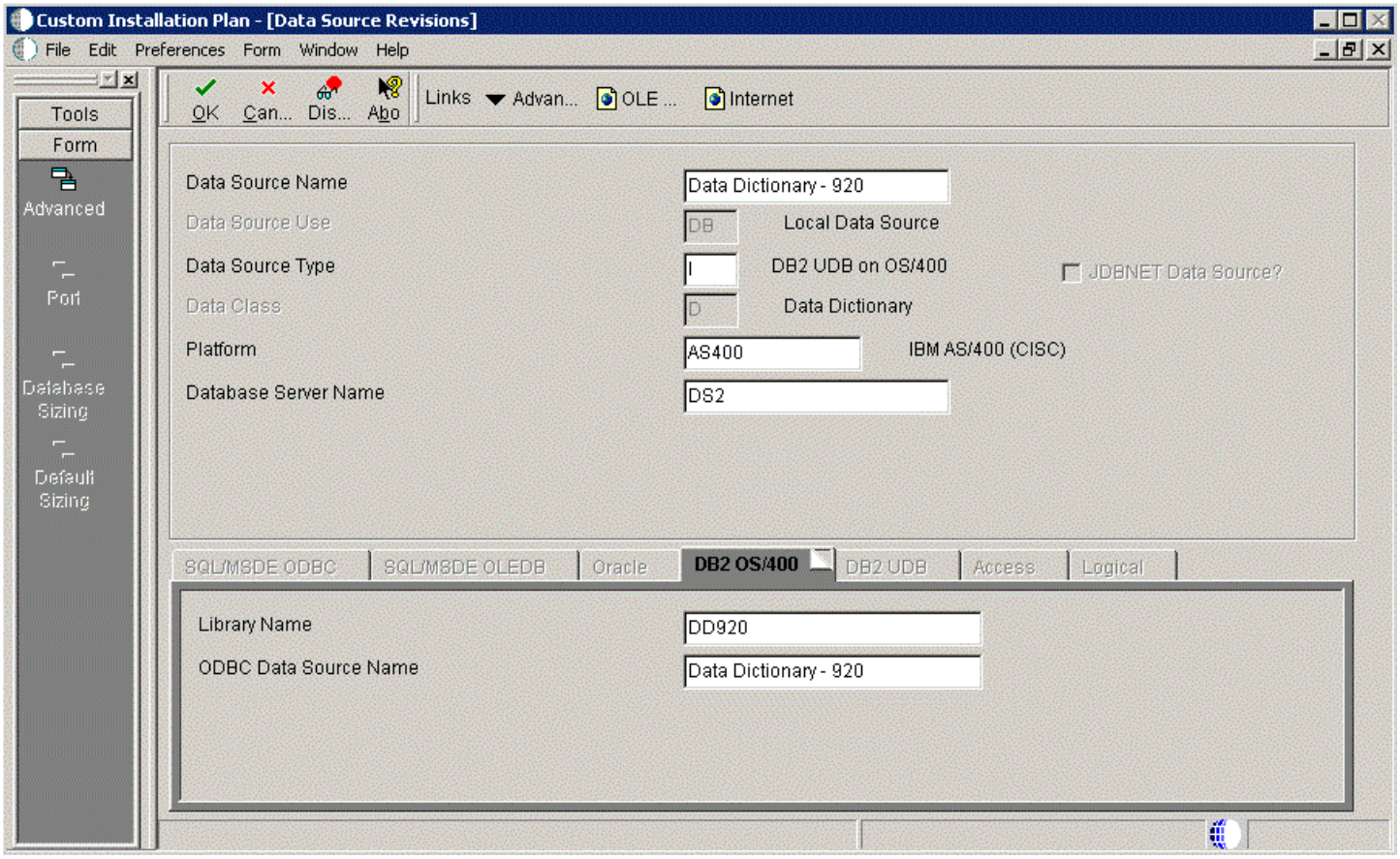
When you are prompted to enter the data source information for the shared data sources, to use the *Release 9.2* data sources, click Take Defaults, or click OK to specifically enter the data source information.

See Also

For more information about System data source fields or fields for other data sources mentioned in this process, refer to Chapter 19, "Understanding Data Source Charts".

Verifying the Data Source for Data Dictionary

To verify the data source for Data Dictionary:

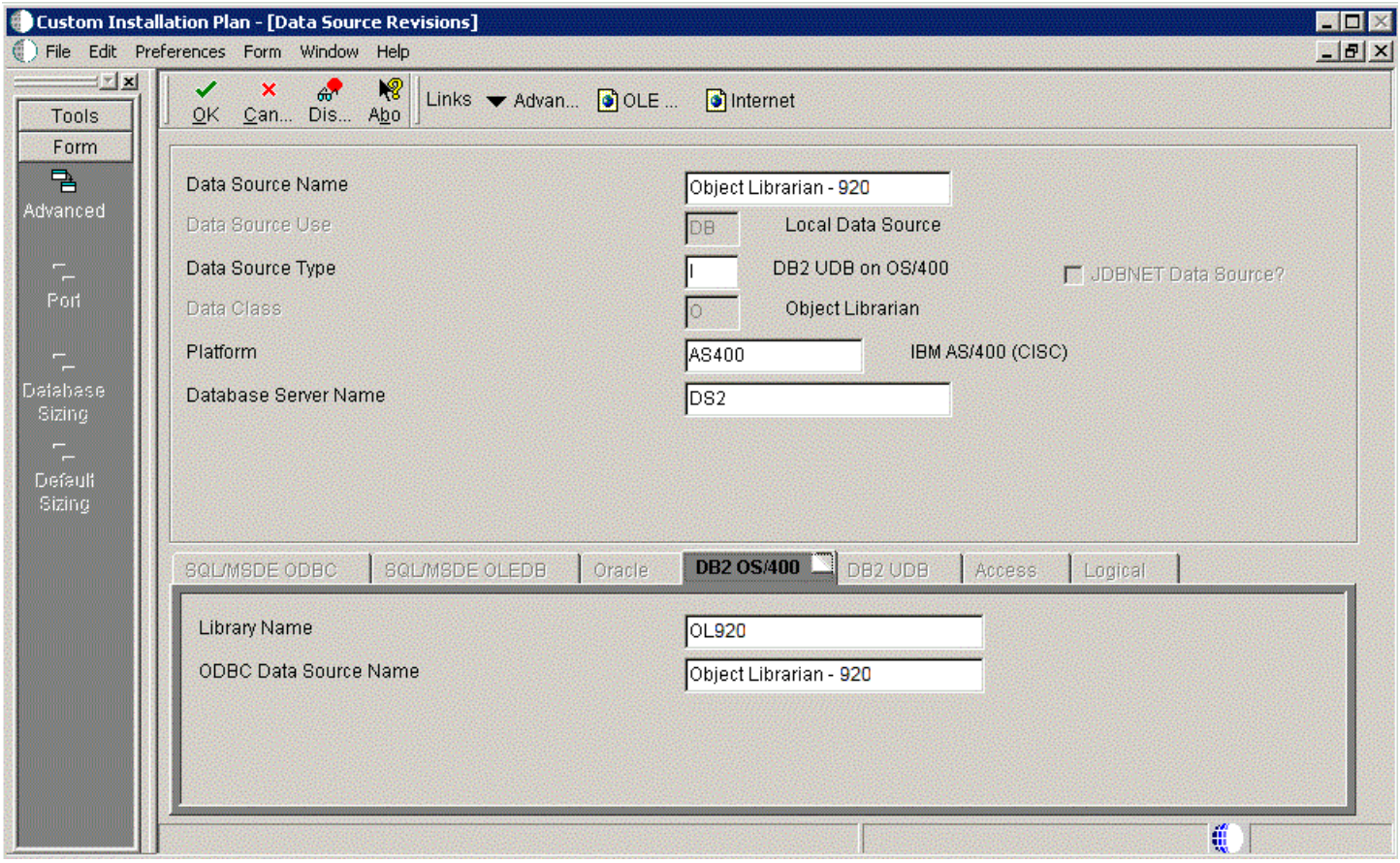


1. On Data Source Revisions, verify the accuracy of the settings for the Data Dictionary data source.

   The library name in the Library Name field is the *Release 9.2* data dictionary library (*DD920*).
2. Click OK.

Verifying the Object Librarian Data Source

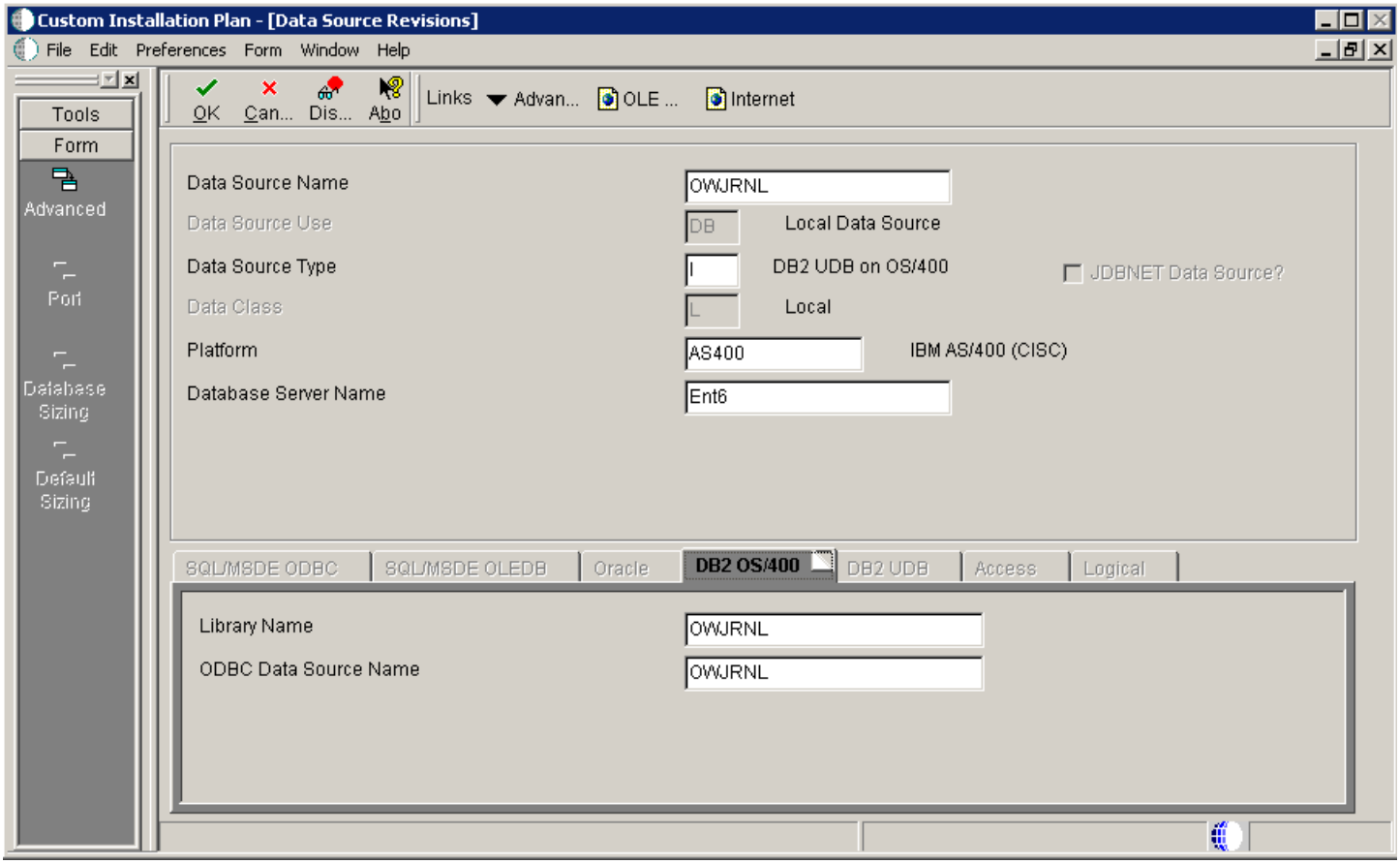
To verify the Object Librarian data source:



1. On Data Source Revisions, verify the accuracy of the settings for the Object Librarian data source.
2. Click OK.

Verifying the Data Source

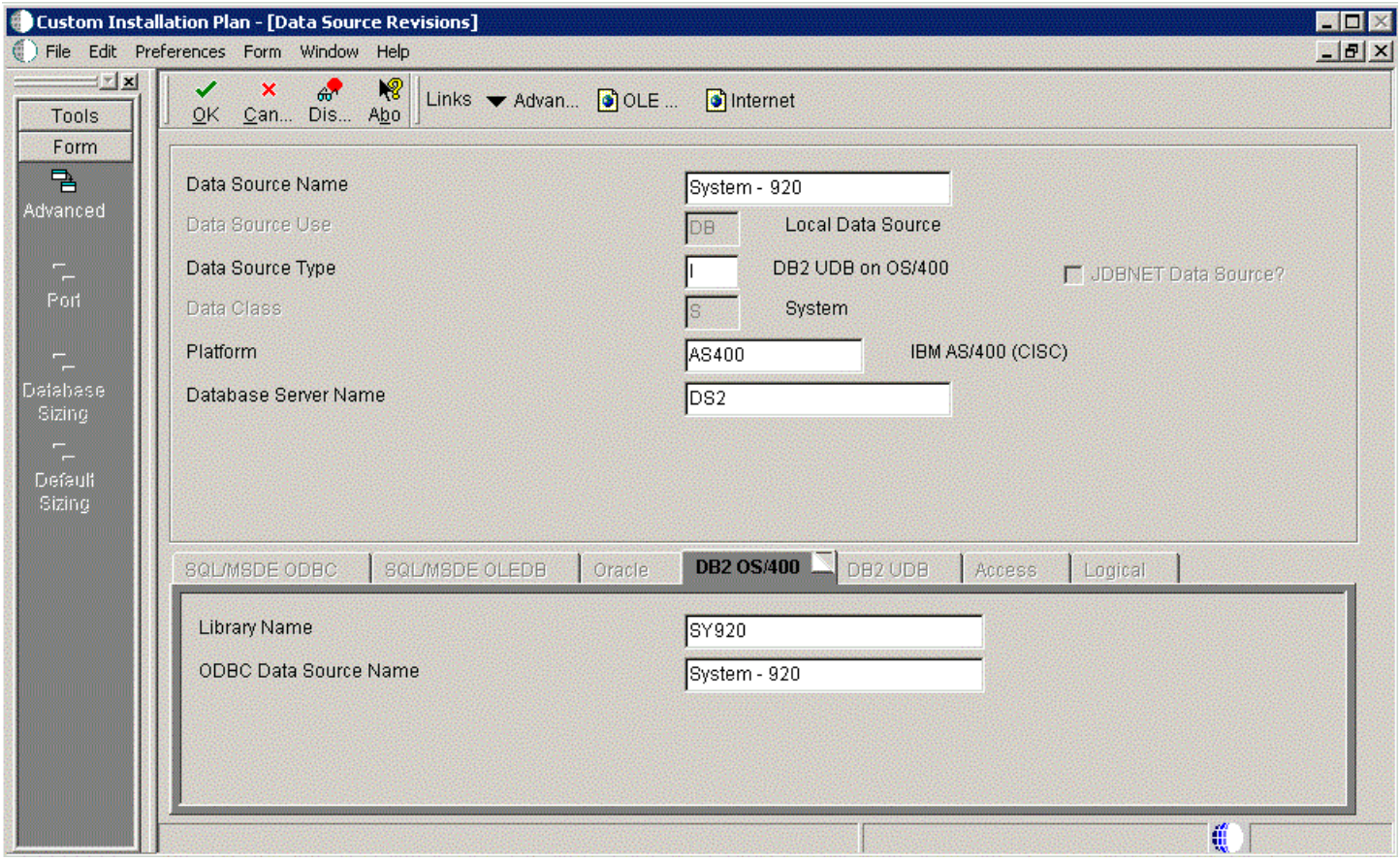
To verify the *OWJRNL* data source:



1. On Data Source Revisions, verify the accuracy of the settings for the *OWJRNL* data source.
2. Click OK.

Verifying the System Data Source

To verify the System data source:



1. On Data Source Revisions, verify the accuracy of the settings for the System data source.
2. Click OK.

   The Environment Selection screen appears.

See Also

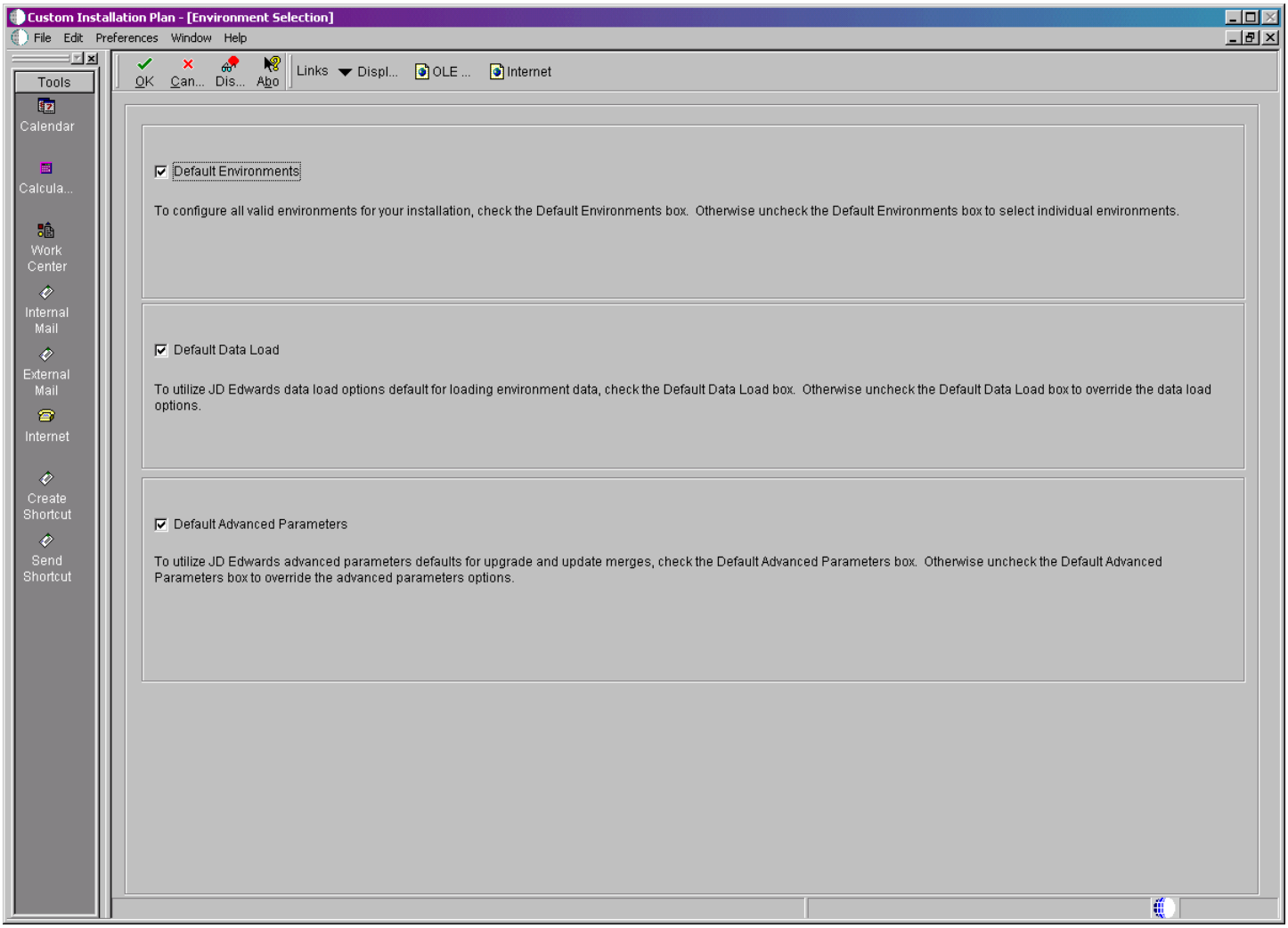
For more information about System data source fields or fields for other data sources mentioned in this process, refer to Chapter 19, "Understanding Data Source Charts".

Setting Up Environments

By default, *Release 9.2* configures your system using values for typical environments. Depending on the options chosen when you set up your plan, *Release 9.2* displays one or more of the following parameters, which you can customize in these tasks:

- Environments
- Data load options
- Advanced parameters
- Languages

You can customize any of these parameters by turning off the default option on the Environment Selection form. As you move through the plan, *Release 9.2* displays a customization form for each parameter that you turn off.



1. On Environment Selection, clear the options for those parameters that you want to customize.

> **Note:** The parameters that are available vary depending on the options that you selected at the beginning of the planning process.

2. Click OK.

> **Note:** If you selected the default option for all parameters, skip to *Setting Up Environment Data Sources*.

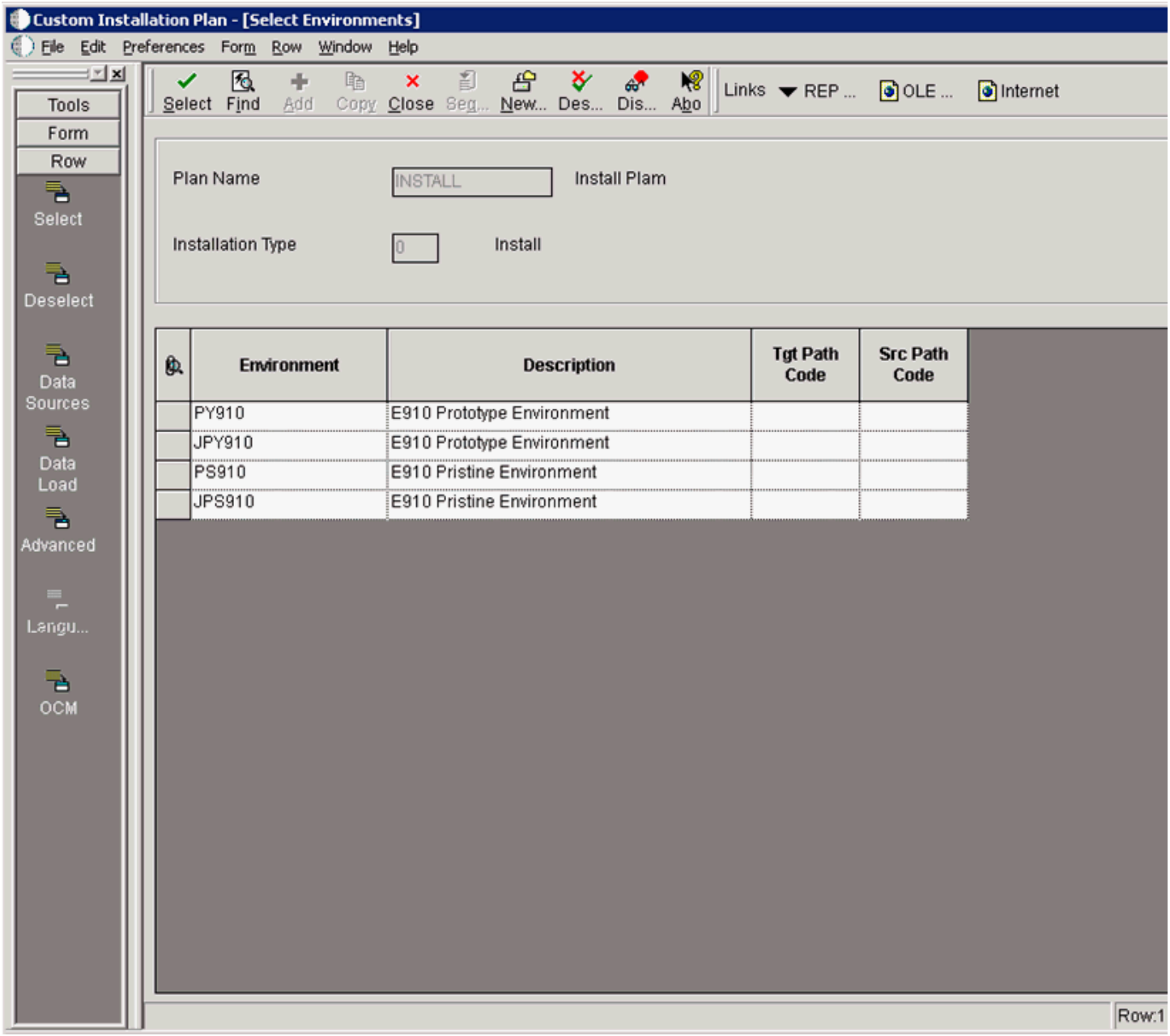
Use the following tasks to customize each of the parameters listed above. *Release 9.2* displays customization forms only for those parameters for which were cleared of the default options. Skip the tasks for those parameters that were selected.

3. Continue with the following relevant tasks:
    - *Selecting an Environment*
    - *Specifying Environment Data Load Parameters*
    - *Verifying Advanced Parameters*
    - *Selecting Languages*

Selecting an Environment

The Select Environment form appears. Environments prefixed with J are required for the *HTML Web Server* .

To select an environment:


Custom Installation Plan - [Select Environments]
File Edit Preferences Form Row Window Help
Tools
Form
Row
Select
Deselect
Data Sources
Data Load
Advanced
Langu...
OCM
Select Find Add Copy Close Seg... New... Des... Dis... Abo
Links REP ... OLE ... Internet
Plan Name
INSTALL
Install Plam
Installation Type
0
Install
Environment
Description
Tgt Path Code
Src Path Code
PY910
E910 Prototype Environment
JPY910
E910 Prototype Environment
PS910
E910 Pristine Environment
JPS910
E910 Pristine Environment
Row:1

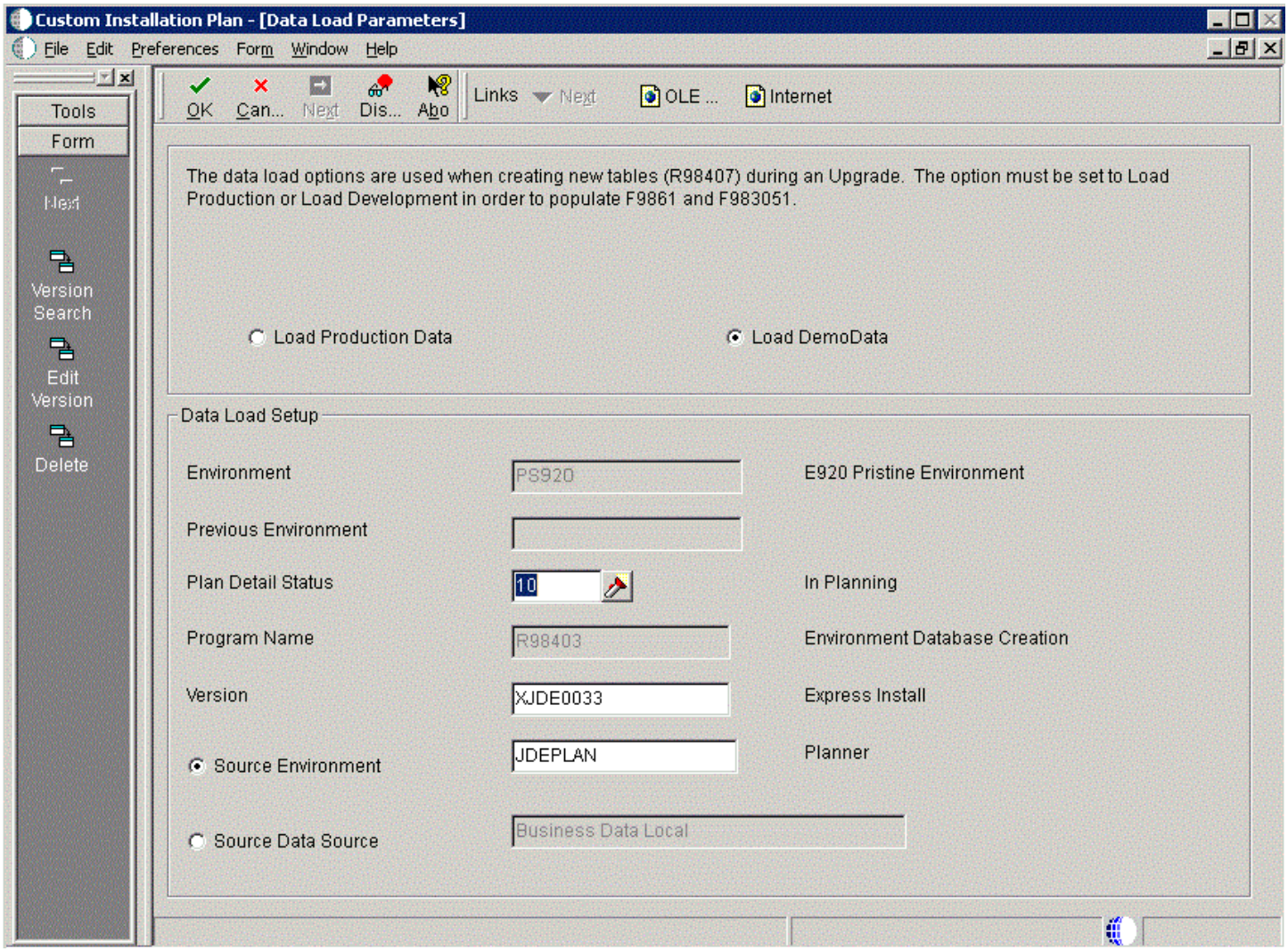
On Select Environments, double-click the environment that you want to define.

To set up multiple environments, choose and define them one at a time. This screen appears after the following tasks are completed.

Specifying Environment Data Load Parameters

If you cleared Default Data Load on the Environment Selection form, the Data Load Parameters form appears.

To specify environment data load parameters:

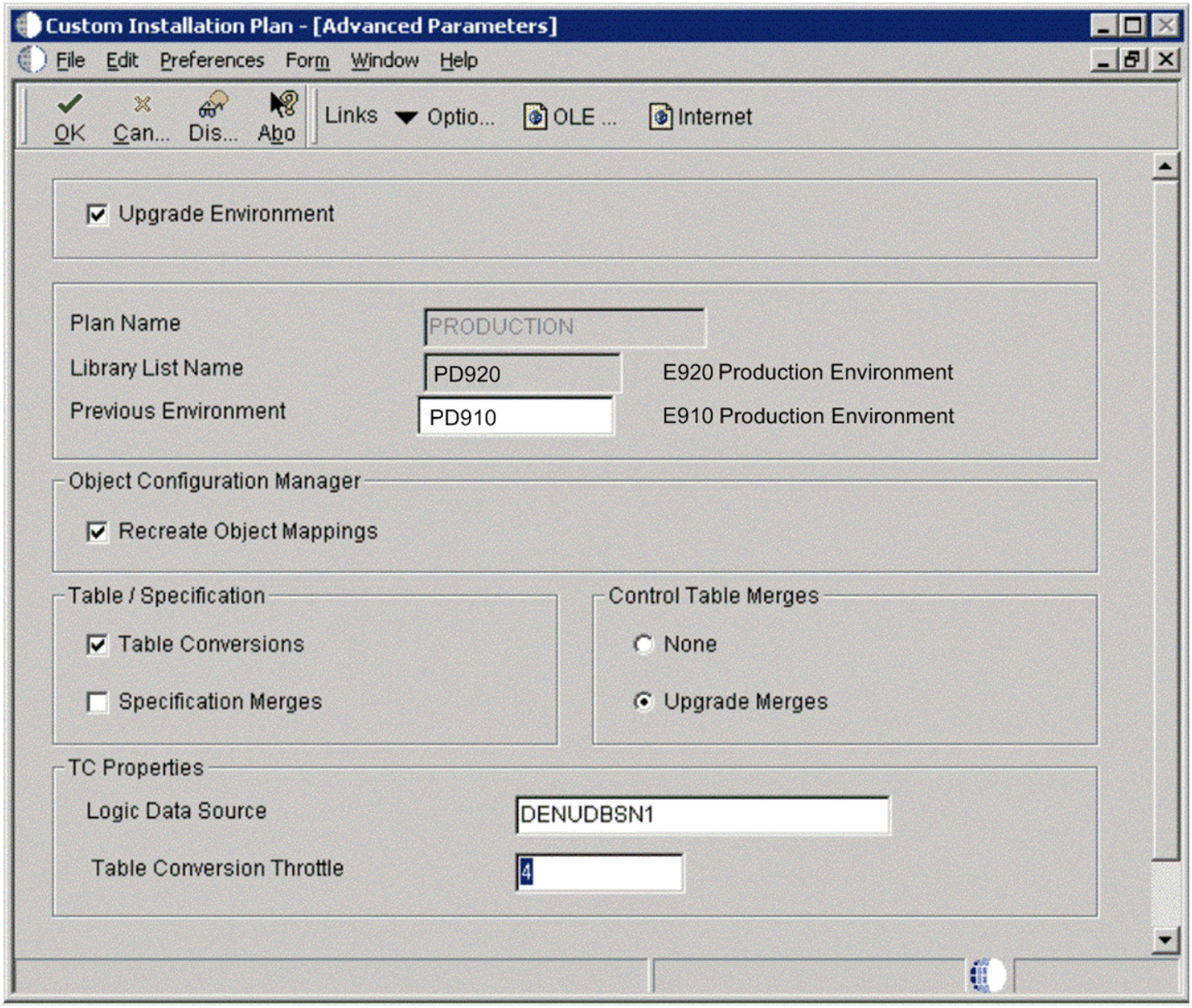


Note: The data load radio buttons on this form are no longer applicable as of *JD Edwards EnterpriseOne* Release *9.1* because data is automatically loaded by the Platform Pack Installer. For additional details, refer to *Loading Data (Demo Data and Production Data)*.

Verifying Advanced Parameters

If you turned off Default Advanced Parameters on the Environment selection form, the Advanced Parameters form appears.

To verify advanced parameters:



1. On **Advanced Parameters**, complete the following fields and turn on the following options:

Field	Description
Logic Data Source	Displays the server data source where the table conversions will run
Table Conversion Throttle	Displays the number of table conversions to be run concurrently on the server

Note: The Table Conversion Workbench checks the maximum jobs for the default job queue for the logic server. It will only submit up to the number of maximum jobs on the queue to run at once. If the throttle is set higher than the queue, it uses the queue maximum number of jobs. If the queue is set higher than the throttle, it uses the throttle.

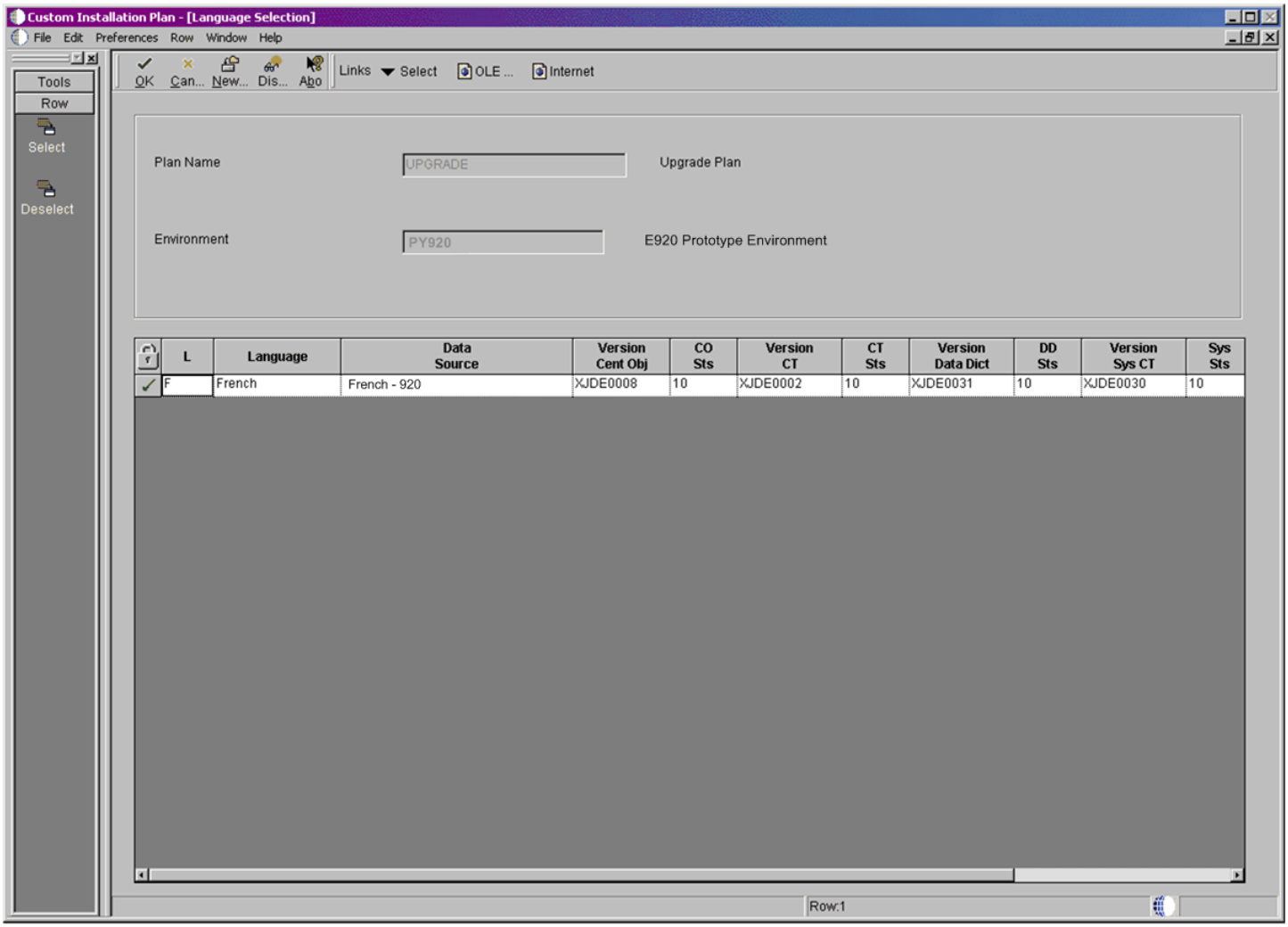
2. Click OK.

   If you are not installing languages, *Release 9.2* prompts you for data source information. Skip to *Setting Up Environment Data Sources*.

   If you turned off Default Languages on the **Select Environments selection** form, continue with *Selecting Languages*.

Selecting Languages

To select languages:



1. On Language Selection, to set up a language for the selected environment, choose the appropriate language.

2. From the Row menu, click Select.
3. Repeat the above steps until all your languages have been selected.
4. Click OK.

> **Tip:** *Customization Considerations.* If you have customizations that you do not want to merge, you can prevent individual conversions and merges from running by changing their status or deleting the appropriate records from the plan before you run the Installation Workbench.

Setting Up Environment Data Sources

Once the Environments have been set up, it is necessary to set up the data sources for those environments. If you created a custom environment, data source information is generated from the data source template provided with *JD Edwards EnterpriseOne* .

See Also

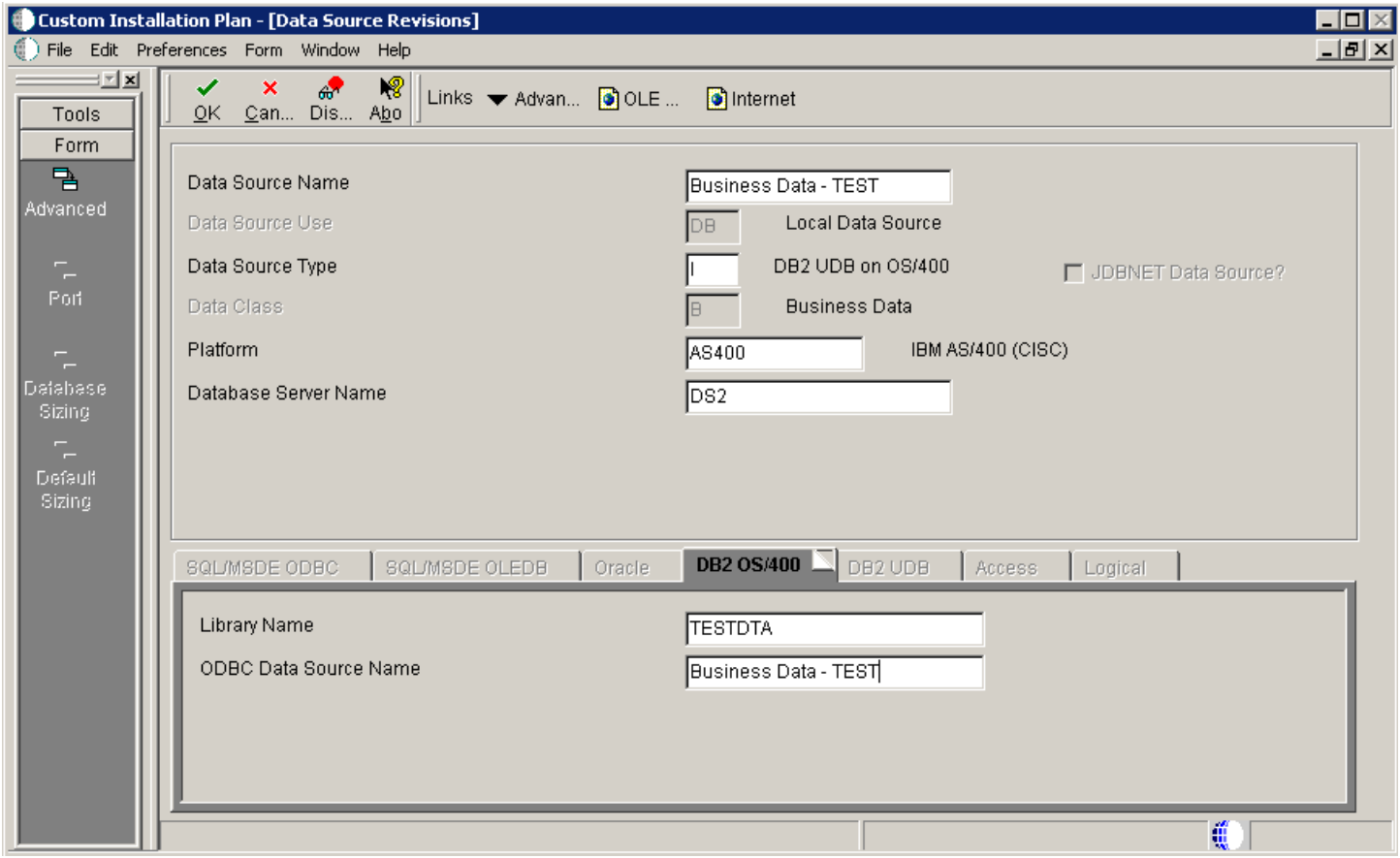
To modify this template, see the *JD Edwards EnterpriseOne System Administration Guide* .

Selecting an Environment Data Source Setup Option

When you are prompted to set up data sources for the environment you just configured, click OK to manually enter the data sources, continue with the following task, or click Take Defaults to accept the *Release 9.2* default data sources.

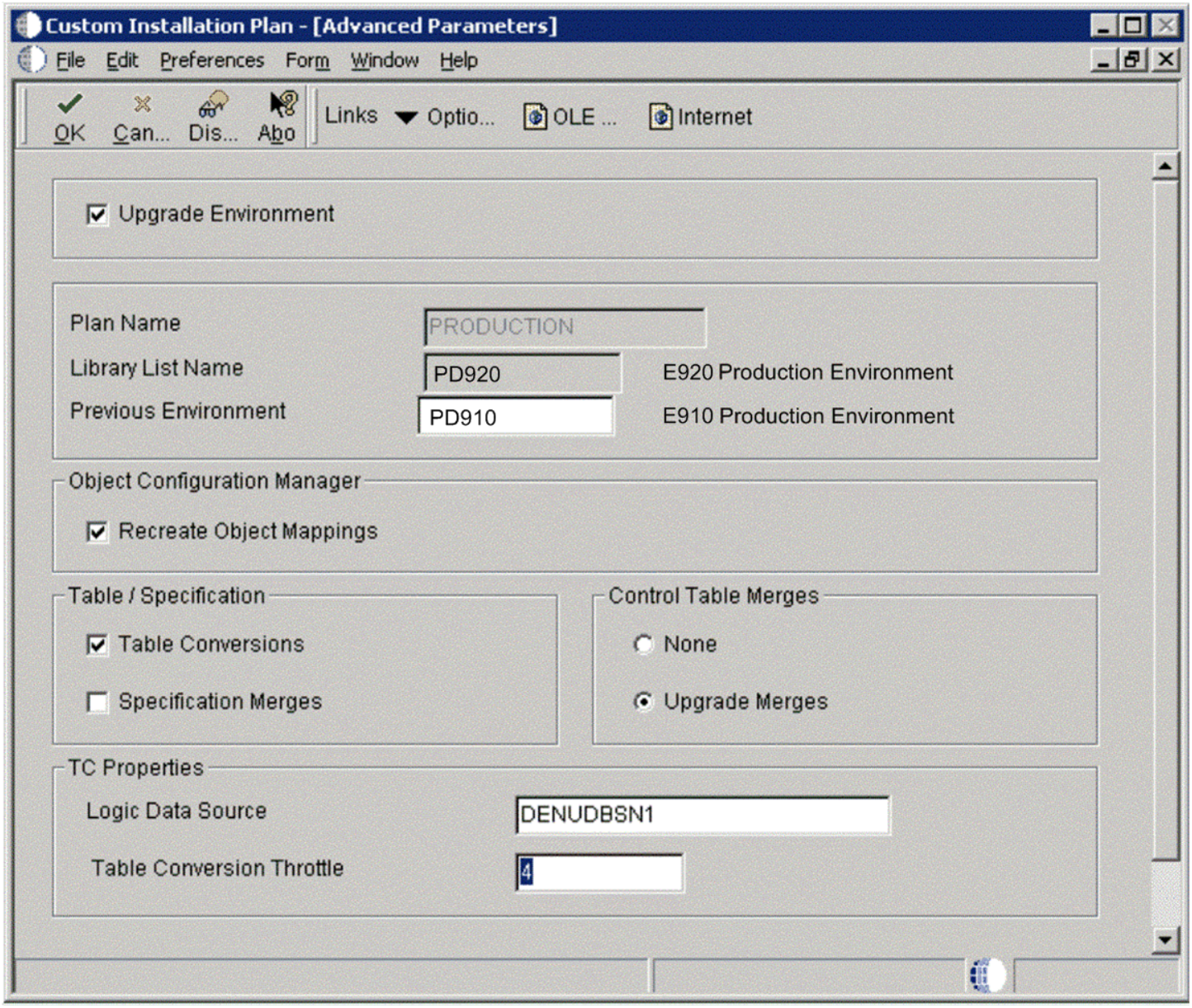
Setting Up the Data Source for Business Data

To set up the data source for business data:



1. From the Form menu, click Advanced.

   Verify the UNICODE flag is off. If your Business Data was not set to Unicode in a previous release and the data source had not yet been converted to Unicode, the Unicode flag must match the contents of the data source.


Custom Installation Plan - [Advanced Parameters]
File Edit Preferences Form Window Help
OK Can... Dis... Abo
Links Optio... OLE ... Internet
Upgrade Environment
Plan Name
PRODUCTION
Library List Name
PD920
E920 Production Environment
Previous Environment
PD910
E910 Production Environment
Object Configuration Manager
Recreate Object Mappings
Table / Specification
Table Conversions
Specification Merges
Control Table Merges
None
Upgrade Merges
TC Properties
Logic Data Source
DENUDBSN1
Table Conversion Throttle
4

2. Click OK.
3. On Data Source Revisions, verify the data source for your Business Data.

   Be sure this data source points either to the existing production data source you want to upgrade or to a copy of it.

   Note: Business Data data sources are specific to the environment and pathcode.

4. When you ran Copy Plan, some fields were changed to reflect the previous release values. Change the following fields:

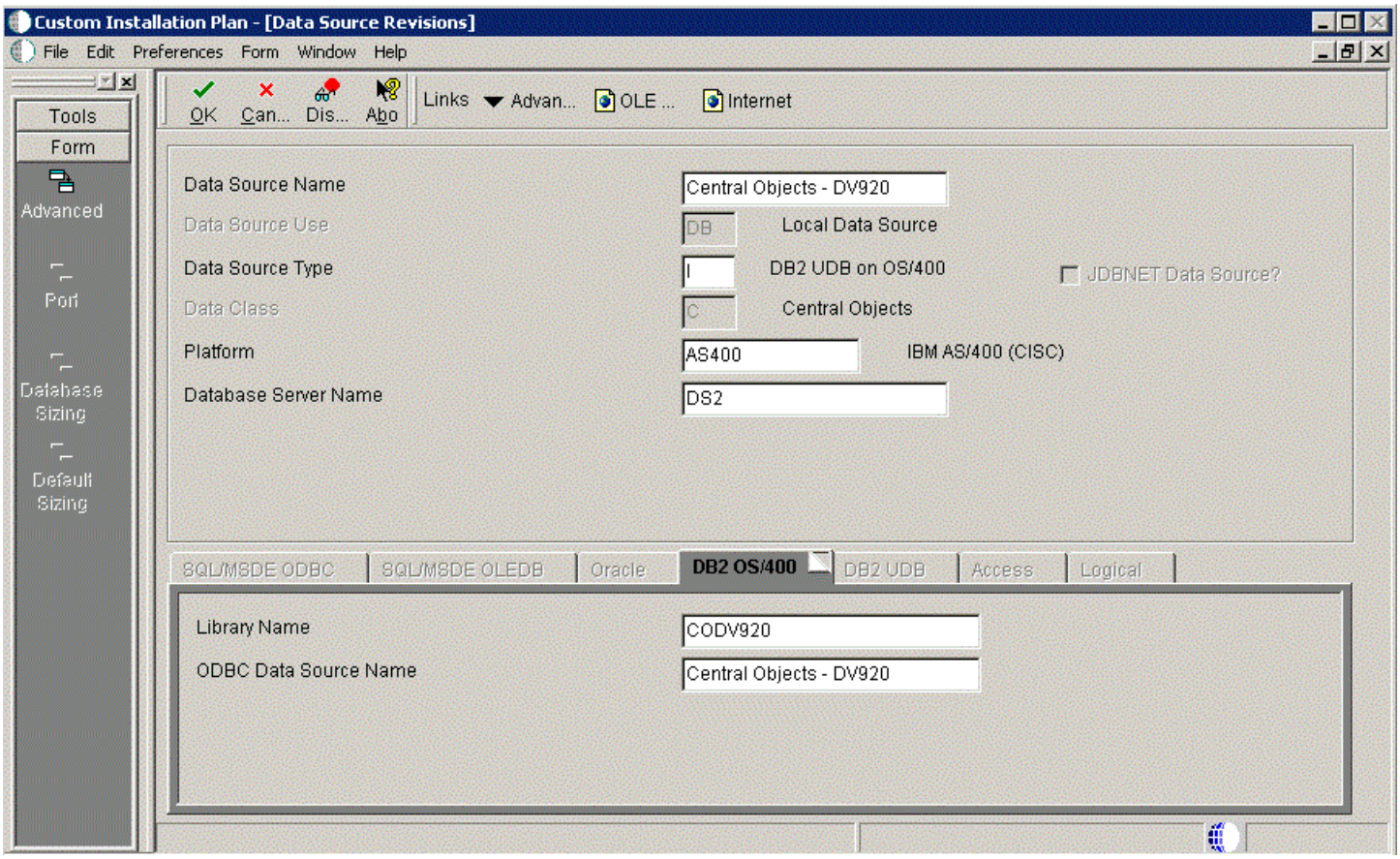
Field	Description
Data Source Type	Enter *I* for *IBM i* Access.
IBM i Database Name	Type the name of the data source, such as Business Data - TEST) in the Database Name field.

5. Click OK.

Setting Up the Data Source for Central Objects

You should change the data source if Central Objects are not on an *IBM i* machine.

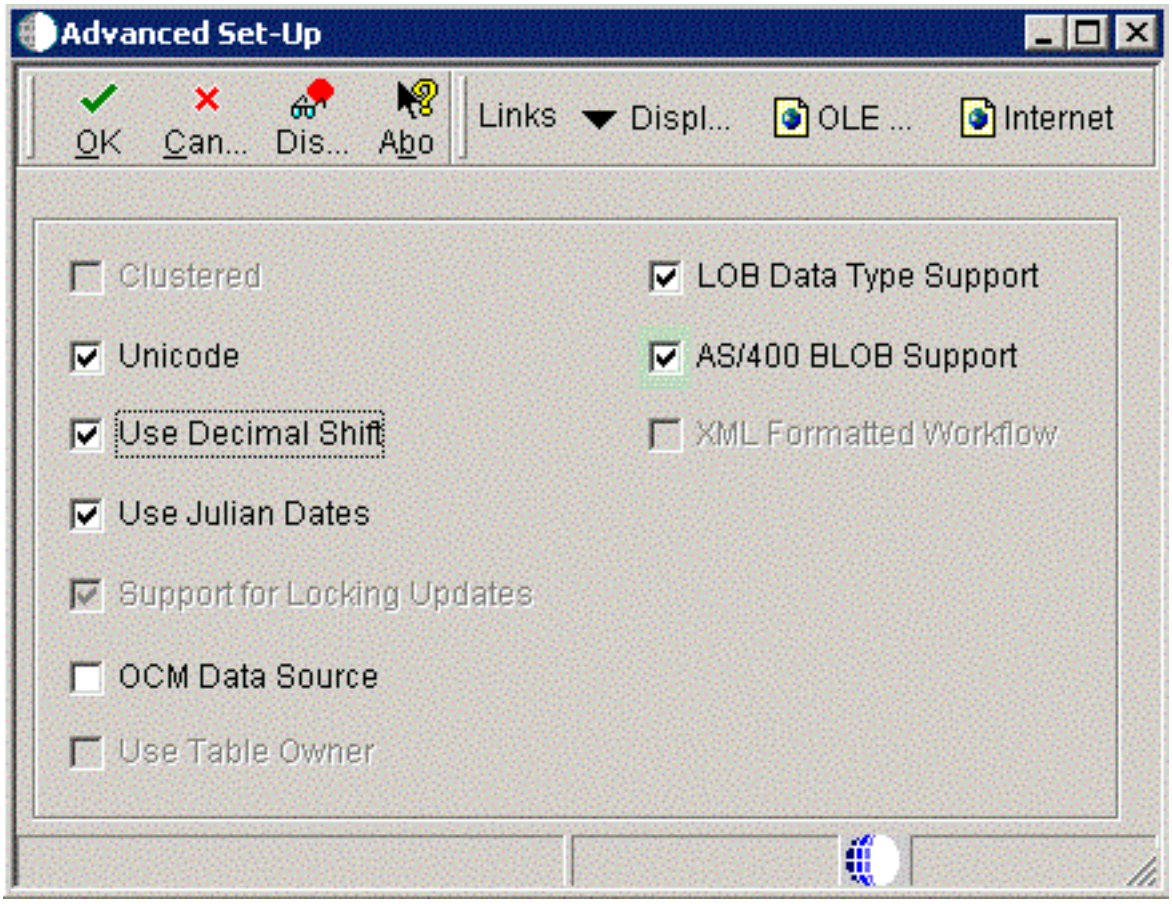
To set up the data source for central objects:



1. On Data Source Revisions, verify the information for your Central Objects data source.

   Verify that your Central Objects data source is Central Objects - <Path Code>.

2. Click OK.

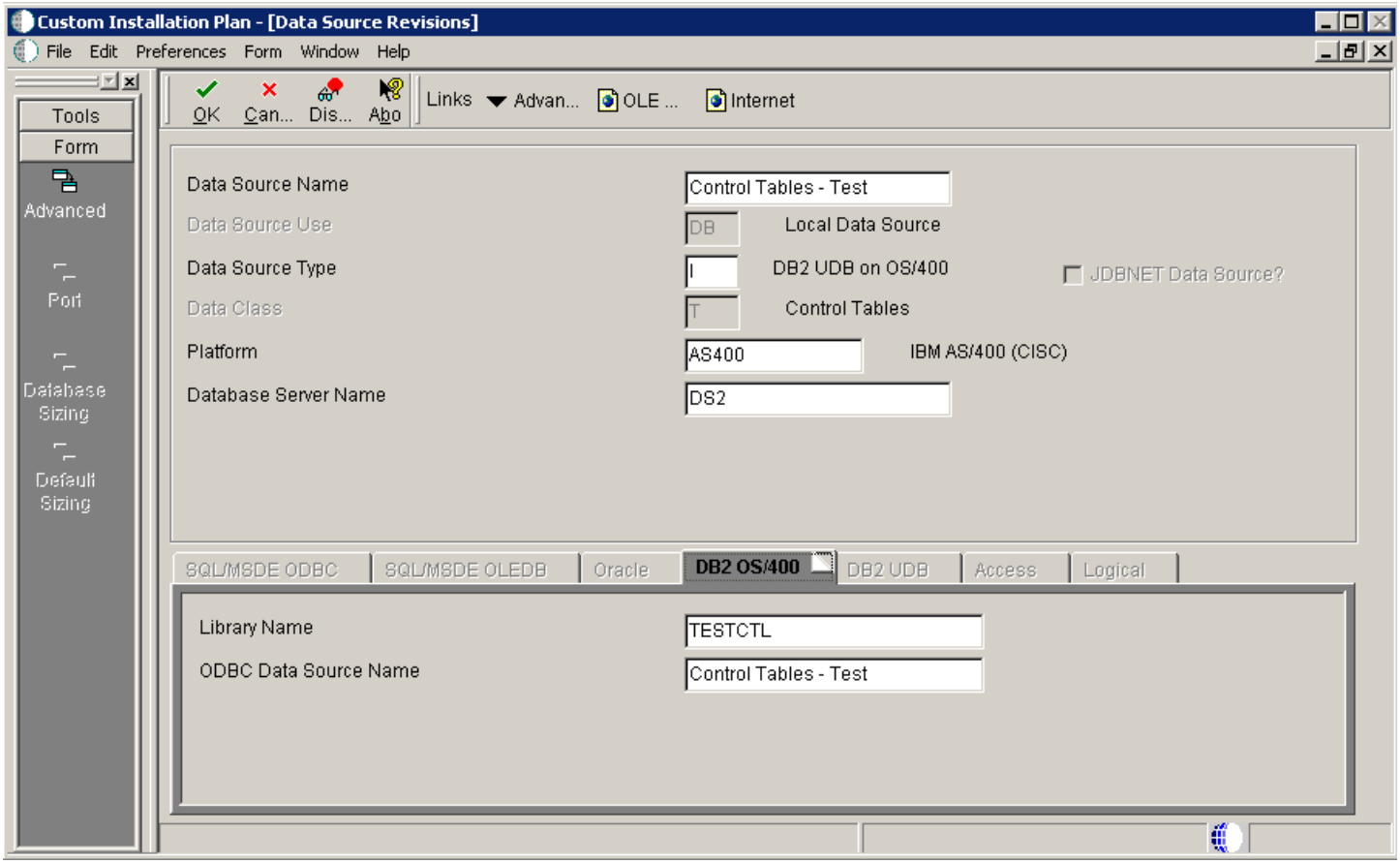


3. On Advanced Set-Up, because the central objects data source must be Unicode, verify the **Unicode** setting is checked.

   For *IBM i* , ensure the **AS/400 BLOB Support** setting is checked.

Setting Up the Data Source for Control Tables

To set up the data source for control tables:



1. On Data Source Revisions, verify the accuracy of the Control Tables data source.

Field	Description
Data Source Name	Verify the name of the data source.

Field	Description
Server Name	Verify the name of the Enterprise Server. **Caution:** When you defined your plan, some fields were changed to reflect the previous release values. Verify the value in Data Source Type field is appropriate for your database. Enter **I** for *IBM i* Access.
Library Name	Enter the name of the library housing your Control Tables for the selected environment.
ODBC Data Source Name	Enter the name of the data source. For example, Control Tables - Test.

Note: Control Tables data sources are specific to the environment and pathcode.

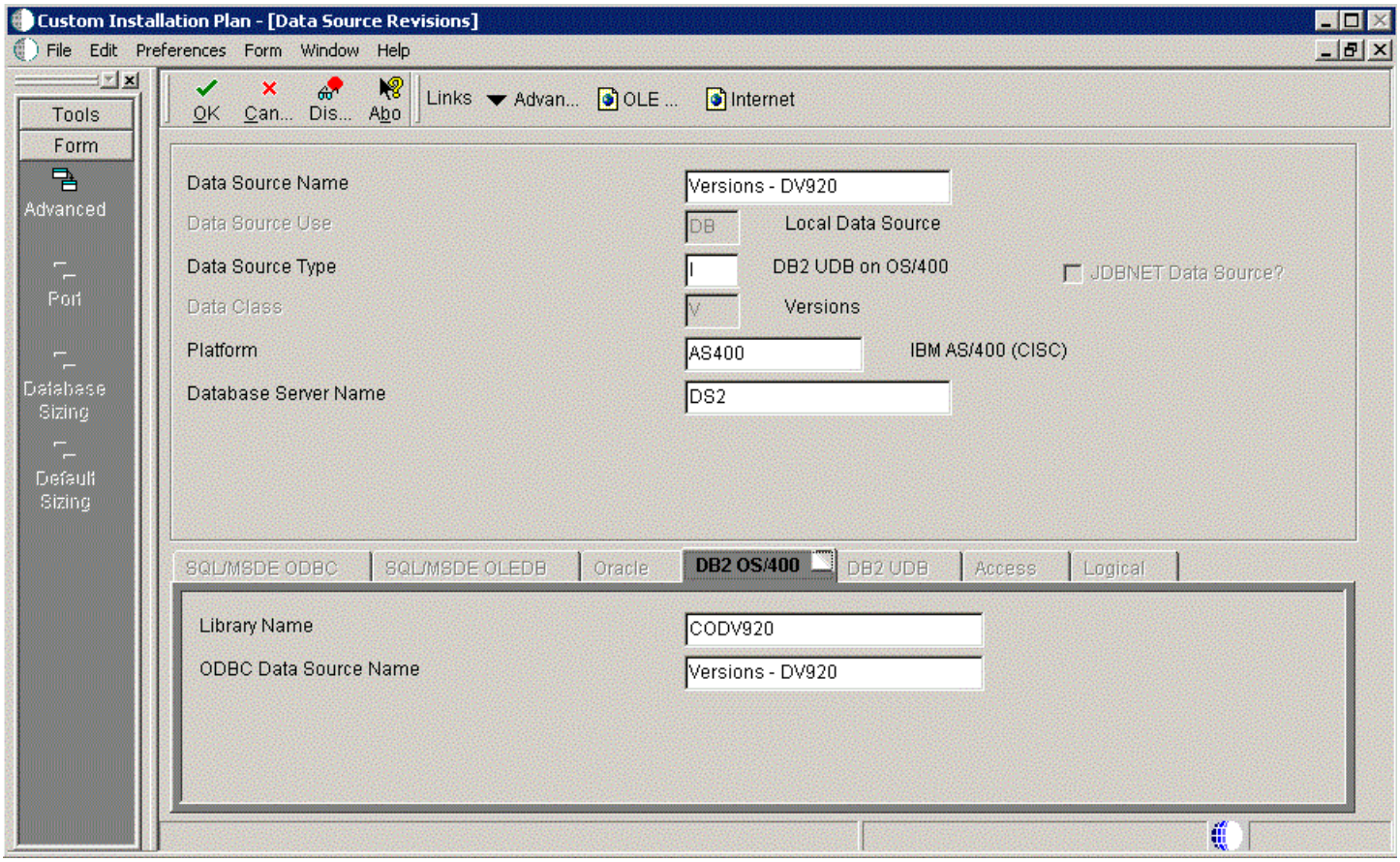
2. Click Advanced and verify that UNICODE is off only if the Control Tables are not set to Unicode in a previous release.

Note: If you upgrade from Release 8.9 the Unicode flag is on.

3. Click OK.

Verifying the Data Source for Versions

To verify the data source for versions:



1. On Data Source Revisions, verify the accuracy of the Versions data source.
2. Click OK.

> **Note:** Versions data sources are specific to the pathcode, and the Unicode flag on the Advanced Form must be checked.

Finalizing the Installation Plan

Installation Planner finalizes your installation plan automatically. A message appears to let you know that the installation plan is finalized.

When the plan is finalized:

- The `\JD Edwards\E920\hosts\hosttype\hostname` directory is created on the Deployment Server. This contains the `jde.ini` and the configuration files used by the *JD Edwards EnterpriseOne* Platform Pack Installer.

  > **Note:** The *JD Edwards EnterpriseOne* Platform Pack Installer cannot be run until the Installation Plan is finalized.

- The status is set to 20, which signals that several adjustments to tables were made according to your plan.
- Create the OCM.
- Modify the *jde.ini* .
- The following tables are upgraded:
  - Release Master table (F00945)
  - Path Code Master table (F00942)
  - Package Plan table (F98404)
  - Machine Detail table (F9651)
  - Language table (F984031), if you are installing an alternate language

To finalize the installation plan:

1. Click OK to exit the concluding message box and initiate the Planner Validation Report.
   - If you chose the default processing option, Planner Validation Report automatically prompts you to run this report.
   - If you did not choose the default processing option, on the tree view of your plan, click Validate to initiate the Planner Validation Report.

Concluding the Validation Planner Report

To conclude the validation planner report:

1. On Report Output Destination, choose On Screen or To Printer, and then click OK.
2. Review the report to confirm that all records were validated.
3. After reviewing the report, on the Batch Versions form, click Close.

   For more information about *Installation Planner Validation Report (R9840B)*, refer to *Working with Reports*.
4. On Work With Installation Plans, click Expand to review the plan that you created.
5. Run Installation Workbench for this installation plan.

   For more information about Installation Workbench, refer to *Working With Installation Workbench*.

Configuring Additional Servers

To configure any additional servers that you have added:

1. Create server map Library (*SVM920*) on additional Enterprise Servers.
2. After configuring your database and server, use Installation Workbench to allocate and configure software and resources.

   When using the Installation Workbench for adding servers, the Table Conversion and the Specification Merge workbenches do not appear because they are not needed.
3. When adding a server plan for a *HTML Web Server* , using the P9654A program, you must add all environments prefixed with J to the Enterprise Server and generate a Server Map data source.

19 Creating a Language-Only Installation Plan

Understanding Language-Only Installation Plans

To make the language-only installation as easy and quick as possible, you should use the procedures in this chapter when installing an alternate language or multiple languages for the first time. These tasks will help you organize the pre-installation preparation required for a language-only installation:

- Install alternate languages at the same time that you install *Release 9.2* , or after completing a working upgrade.
- Implement a language-only plan only for installations in which a language has not been previously installed.

It is important that you complete all tasks in this chapter to achieve a successful language installation.

Reviewing Requirements for a Language Installation

To review the basic requirements for performing a language installation:

1. Review the language installation process.

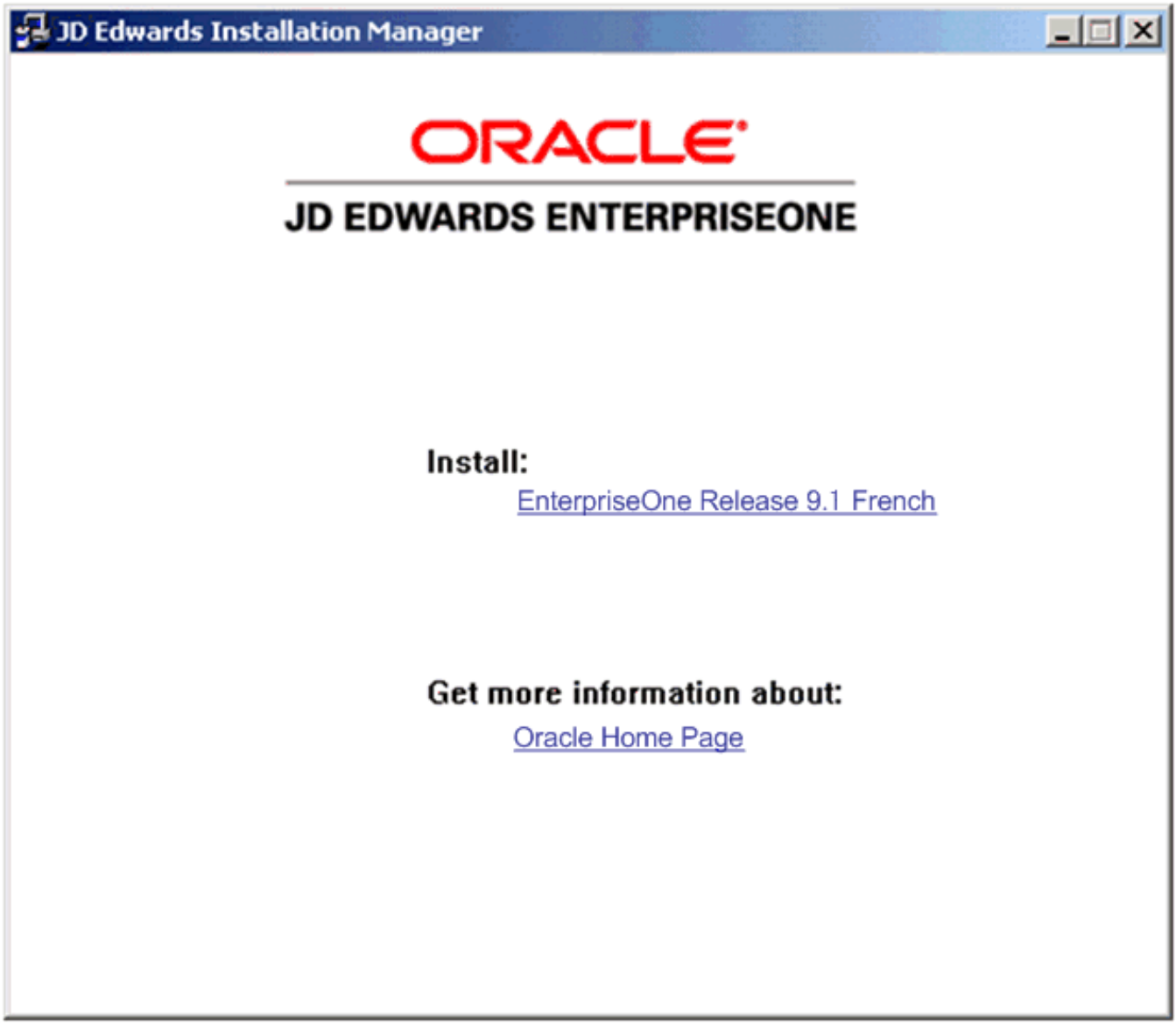
   The detailed information regarding the language installation process is found in *Language Process Overview*.
2. Review the disk space requirements.

   Verify that the disk space requirements are available for each language and each environment that you are installing on the deployment and Enterprise Servers.
3. Review the directory structure.

Installing Languages on the Deployment Server

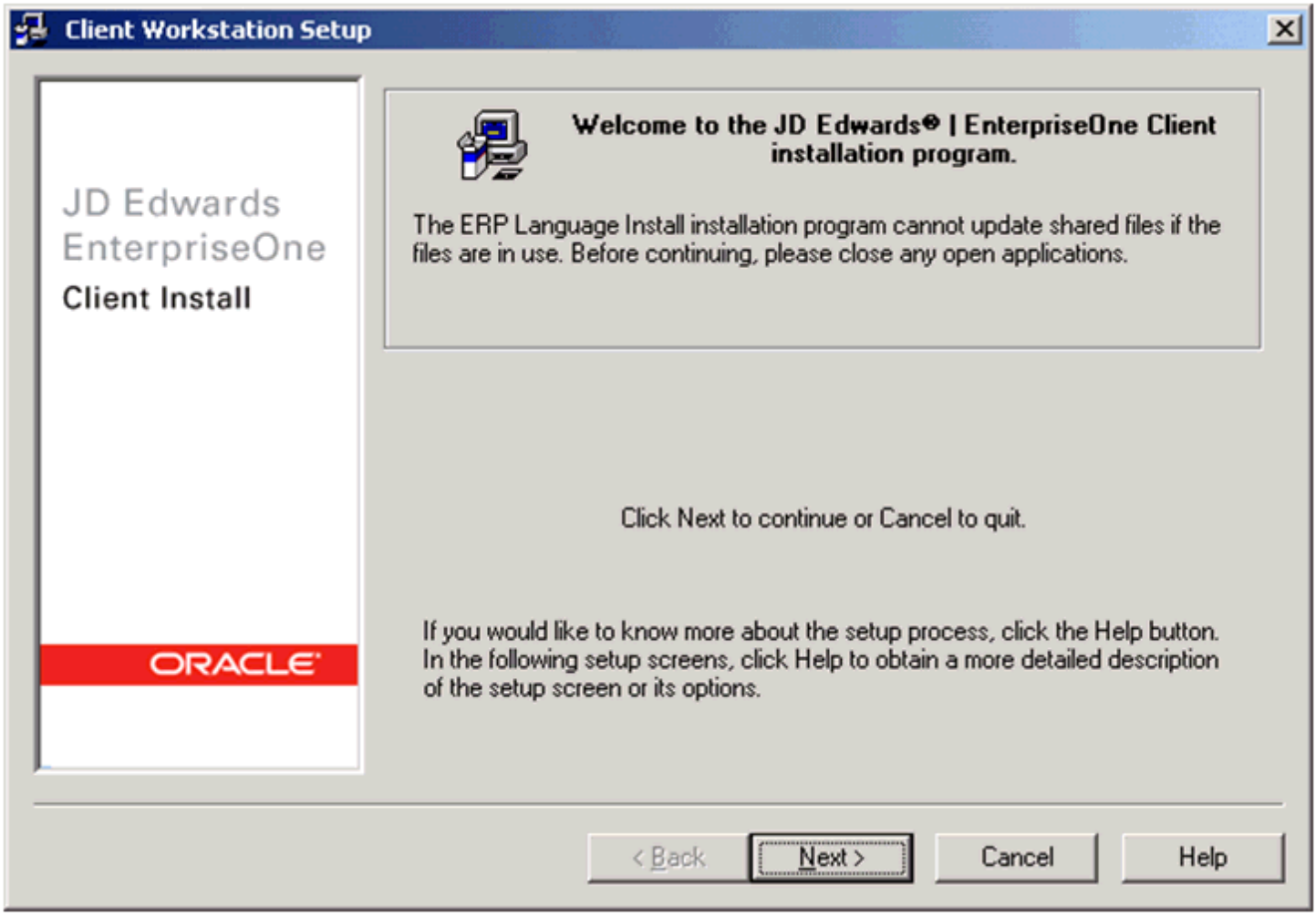
To install languages on the Deployment Server:

1. Obtain the *JD Edwards EnterpriseOne* language and run the **`setup.exe`**.

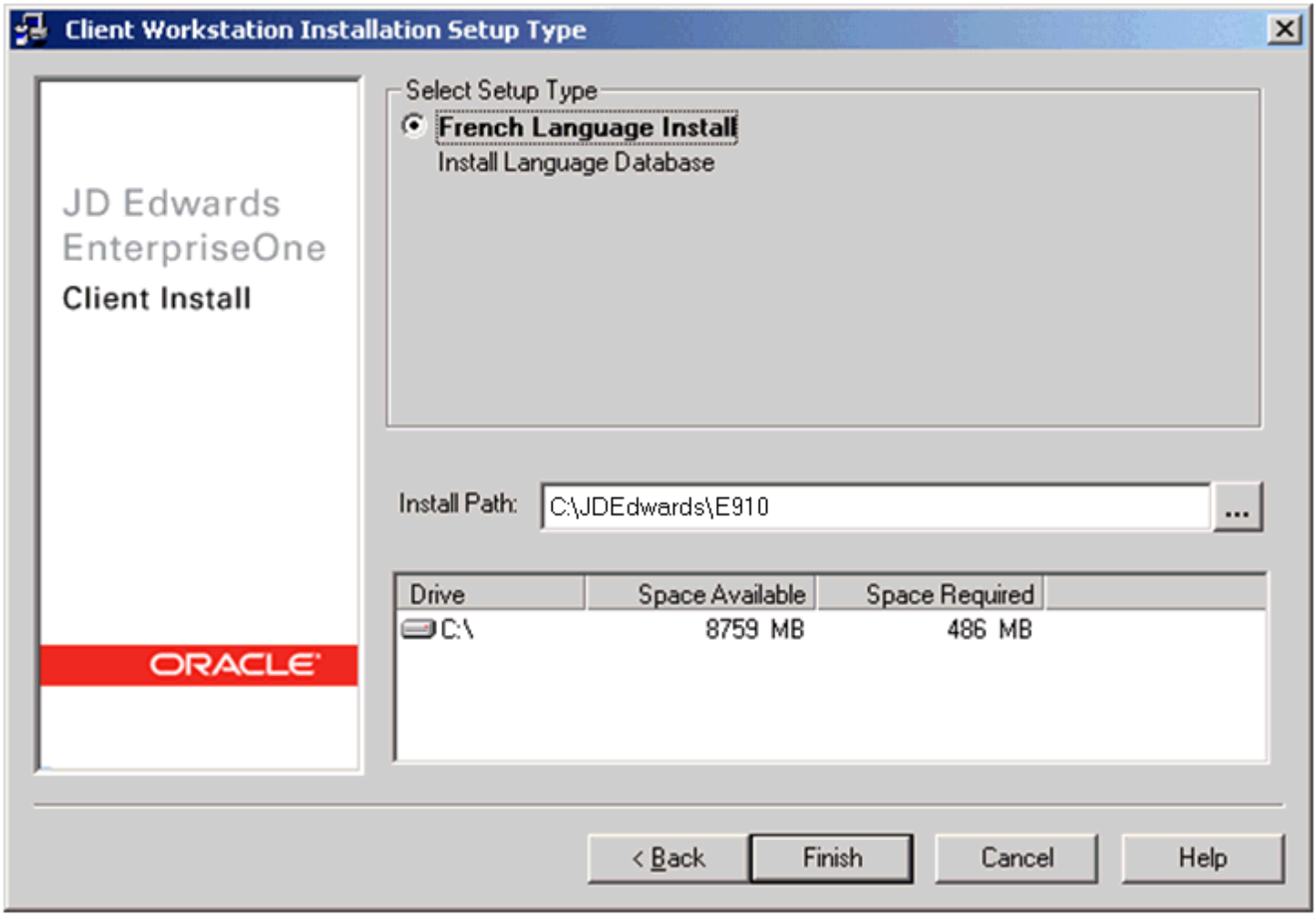

JD Edwards Installation Manager
ORACLE
JD EDWARDS ENTERPRISEONE
Install:
EnterpriseOne Release 9.1 French
Get more information about:
Oracle Home Page

2. On JD Edwards Installation Manager, click the link for the language that you want to install.

   In this example, the language installation image is for French.



3. On the Welcome screen, click Next.

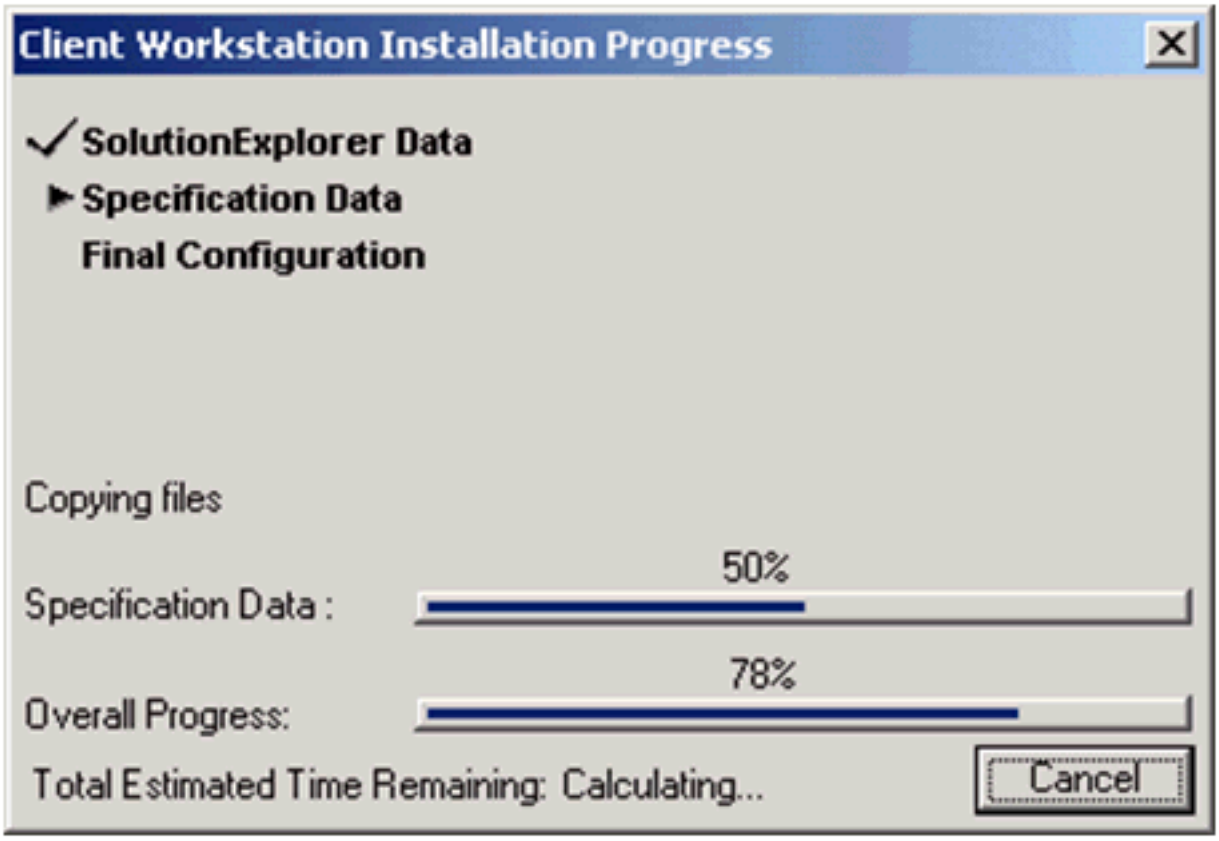


4. On Installation Setup Type, complete these fields:

Field	Description
Select Setup Type	Ensure the radio button for your language is selected.
Install Path	The Installer provides a default path to the existing client installation on this machine:

Field	Description
	c:\JDEdwards\ *920* You must verify that this drive and path is valid for your installation. You can use the browse function to locate the directory.

5. Click Finish.



The Install Progress displays the progress of the language installation.

When the installation finishes, the Oracle Deployment Server Setup form indicates whether the installation was successful.

6. On Installation Complete, click OK.

> **Note:** To access more than one language within the same package, you need to build a custom package that includes all available languages.

Running Installation Planner

Once you have installed languages on the Deployment Server, run Installation Planner. These tasks highlight the critical language-related stages of this operation.

- *Accessing Installation Planner*
- *Entering Information into Installation Planner*
- *Selecting Custom or Default Parameters*
- *Selecting an Environment*

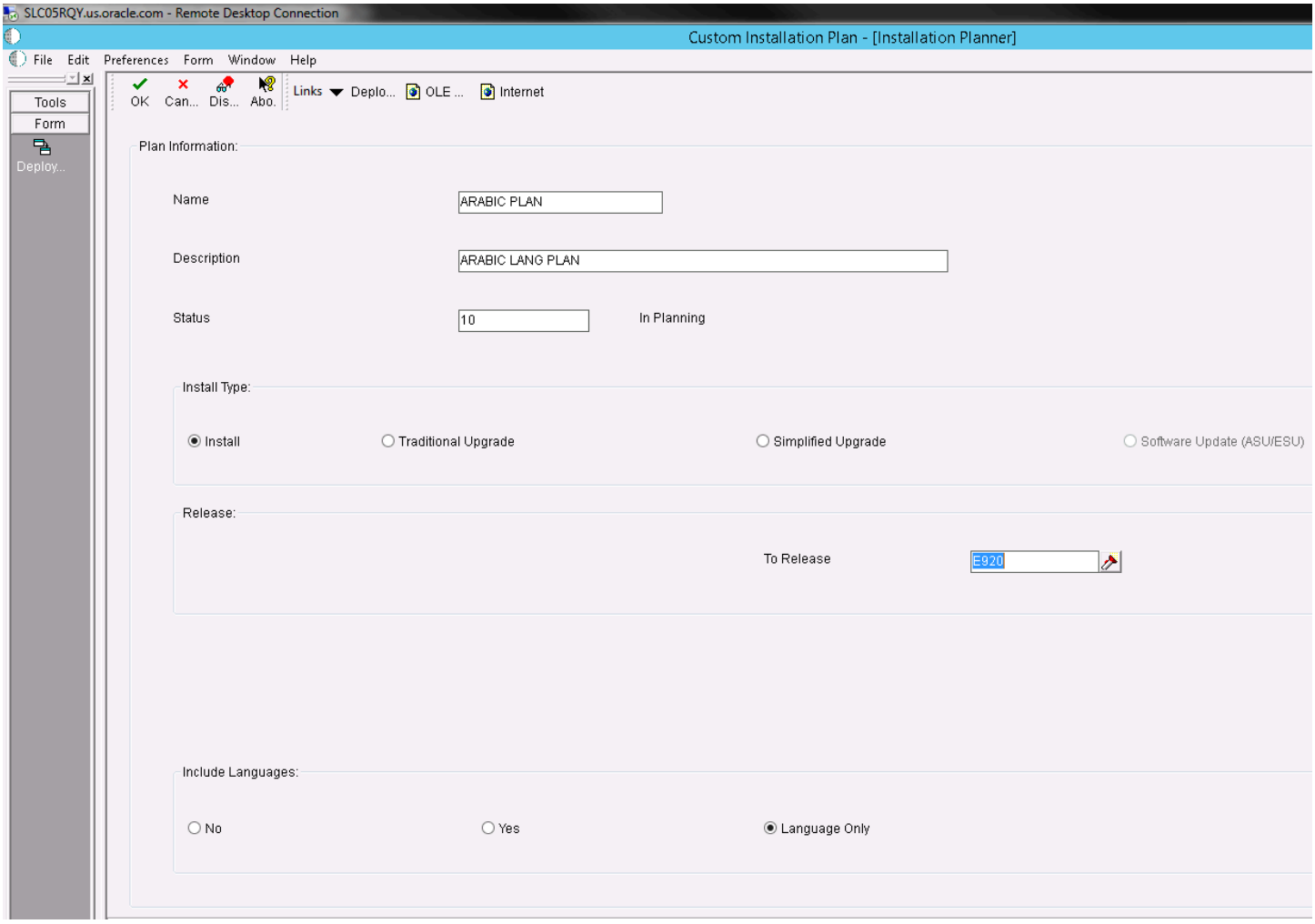
Accessing Installation Planner

For details on accessing the Installation Planner, refer to the chapter of this guide entitled: *Working with the Installation Planner*.

> **Note:** If you choose a custom installation plan, you can choose which language to install for each environment. This section assumes you are defining a custom plan.

Entering Information into Installation Planner

To enter information into the Installation Planner:

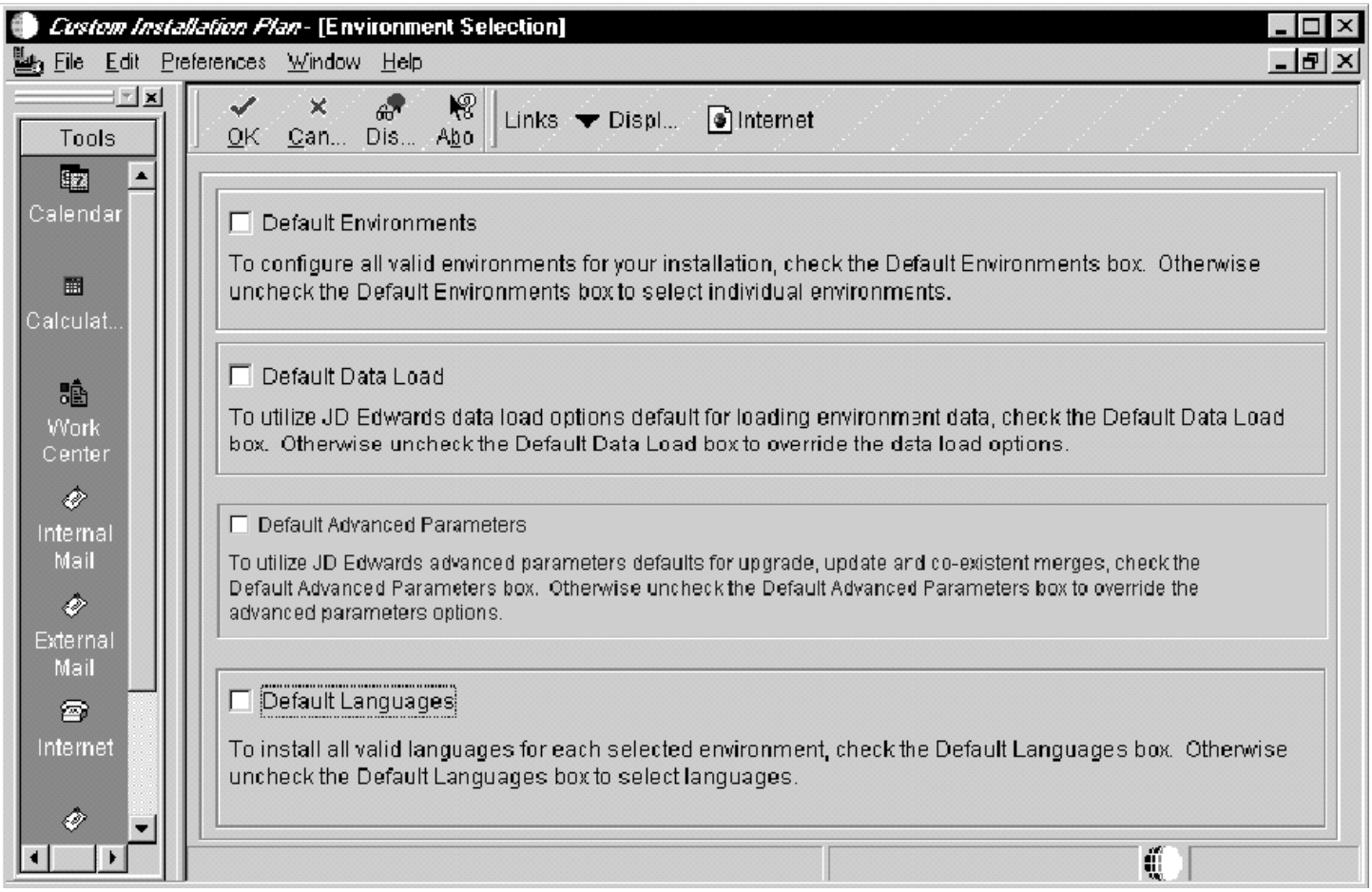


1. On Installation Planner, enter the basic plan information.

2. In the Include Language area, select the Language Only option.

Selecting Custom or Default Parameters

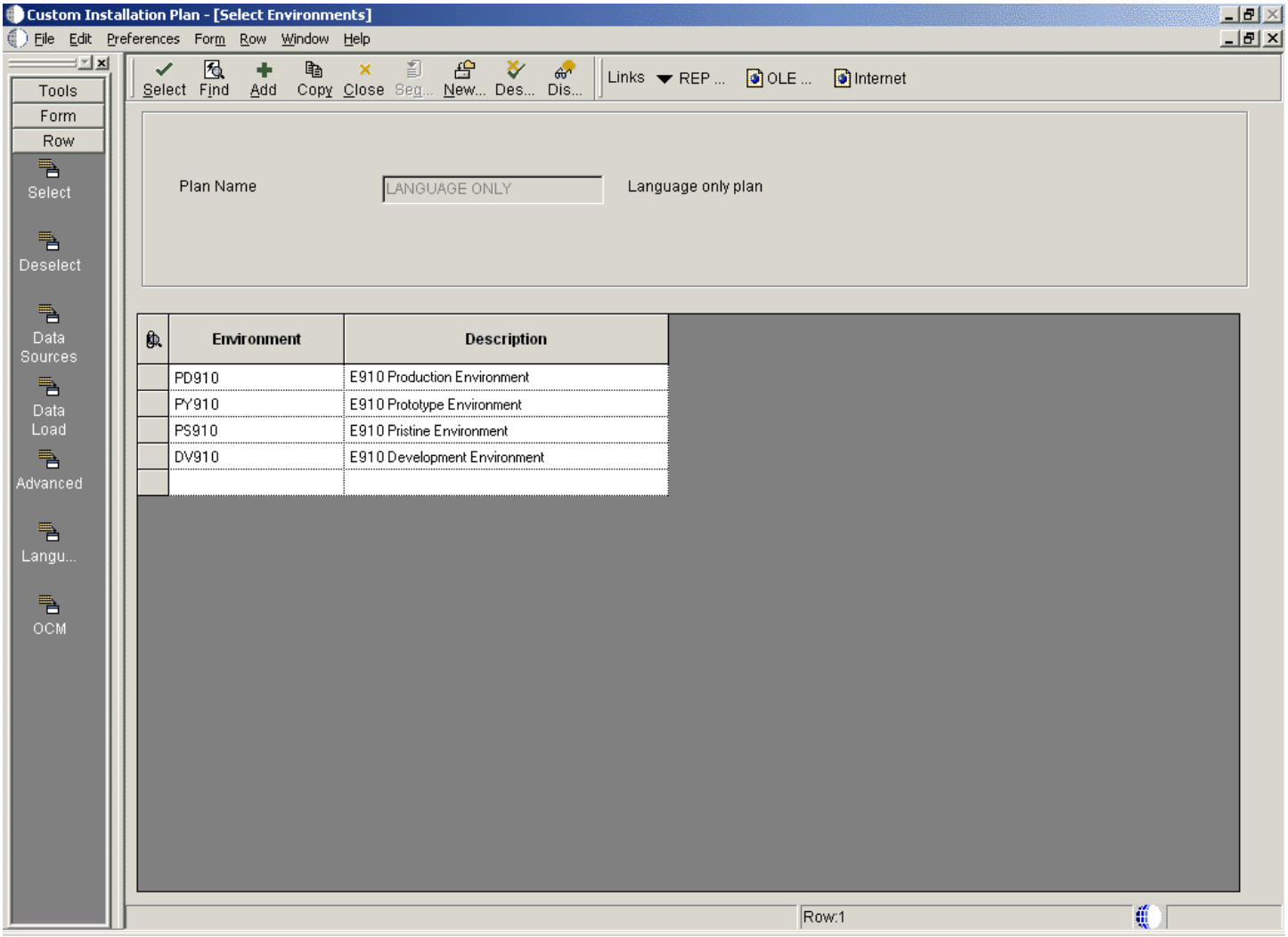
To select custom or default parameters:



1. From Environment Selection, all environments and languages are the default values. Clear the options for Default Environment and Default Languages if you want to specify which language or languages to install for each environment.

Selecting an Environment

To select an environment:

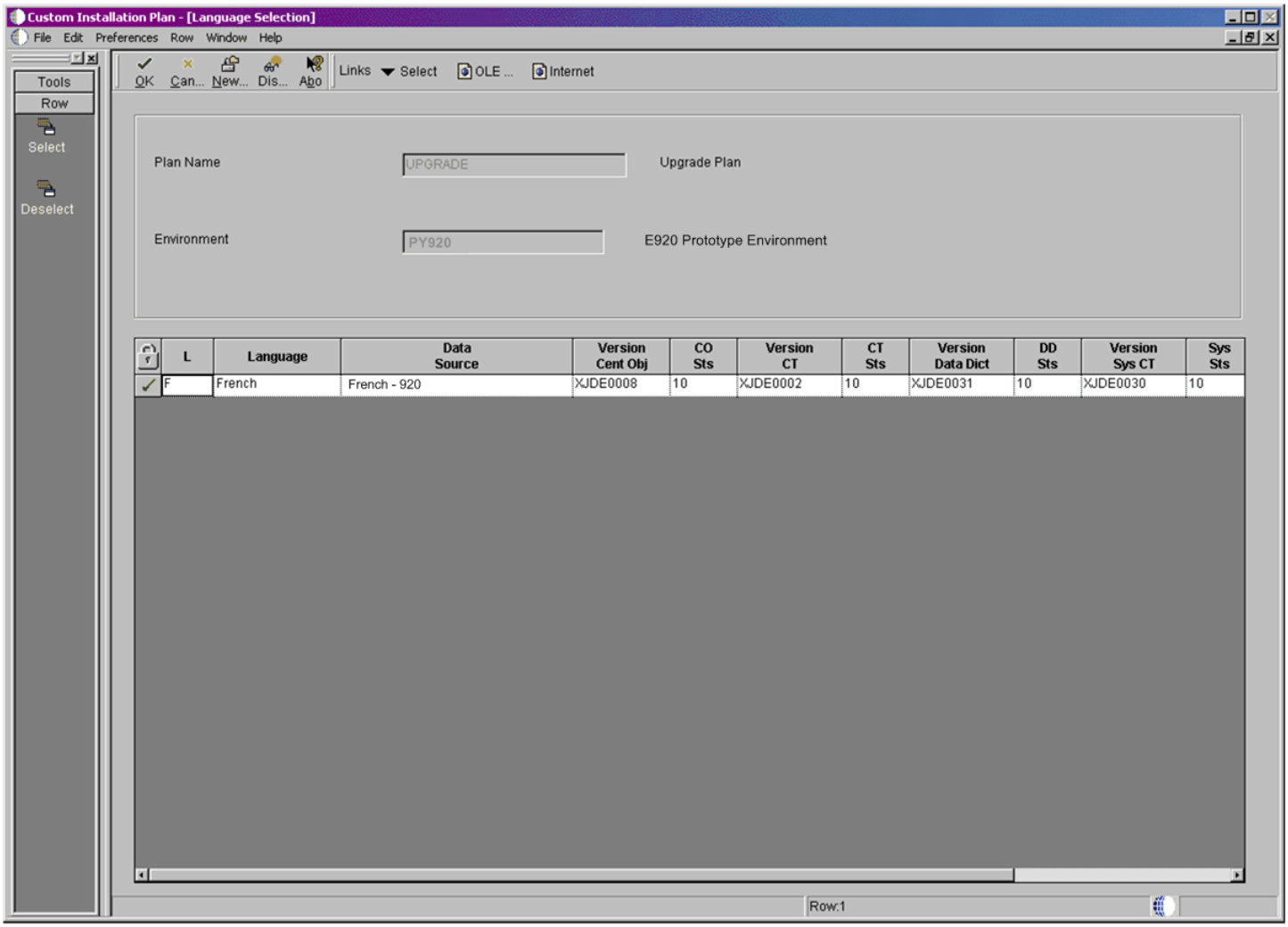

Custom Installation Plan - [Select Environments]
File Edit Preferences Form Row Window Help
Tools
Form
Row
Select
Deselect
Data Sources
Data Load
Advanced
Langu...
OCM
Select Find Add Copy Close Seg... New... Des... Dis...
Links REP ... OLE ... Internet
Plan Name
LANGUAGE ONLY
Language only plan
Environment
Description
PD910
E910 Production Environment
PY910
E910 Prototype Environment
PS910
E910 Pristine Environment
DV910
E910 Development Environment
Row:1

Choose the environment for which you wish to install a language.

The Language Selection form appears.

Selecting a Language

To select a language:



1. On Language Selection, to set up a language for the selected environment, choose the appropriate language.

2. From the Row menu, click Select.
3. Repeat the above steps until all your languages have been selected.
4. Click OK.

Running Installation Workbench

After you create the language-only plan, you must run it through a series of workbenches in order to load the language tables to the appropriate data sources. The language installation process is the same for every database.

To run the Installation Workbench:

1. Go to *Working With Installation Workbench*.
2. Complete the procedures for Control Table Workbench and Specification Table Merge Workbenches.

   The control tables, data dictionary, and central objects will be loaded by the Control Table Workbench and the Specification Table Merge Workbench.

Verifying Enterprise Server Requirements

To verify Enterprise Server requirements:

1. Verify that the Enterprise Server hardware and software meet all requirements.
2. Verify that the Enterprise Server disk space meets all requirements.
3. Verify that the `jde.ini` settings for local code set and code page values are set for your preferred language. These values are found in the National Language Support tables in *Language Process Overview*.

Verifying Development Client Requirements

To verify Development Client requirements:

1. Verify that the Development Client hardware and software meet all requirements.
2. Install the appropriate language character set to a Development Client.
3. Complete the step to verify the *JDE.INI* settings on the Deployment Server for Interactive Runtime, Install, and Network Queues.
4. Complete the tasks in *Installing the Development Clients for Developers and System Administrators*.
5. Verify that the group and user profiles are set up properly.

Completing the Language Installation

Once you have verified that the Enterprise Server and Development Client hardware and software meet your language install requirements, you can complete the installation.

See the *JD Edwards EnterpriseOne Tools Package Management Guide* for more information about how to transfer language specifications to the Enterprise Server.

Building and Deploying Alternate Language Packages

Once you have concluded the installation, it is time to build and deploy the alternate language packages. See *Package Build* in the *JD Edwards EnterpriseOne Tools Package Management Guide* for the details of including a language or creating language-only packages.

20 Installing Languages Using Change Assistant on JD Edwards EnterpriseOne

Understanding Language Installs through Change Assistant

The latest version of Change Assistant can be used to install languages on JD Edwards EnterpriseOne Release 9.2. You can use Change Assistant to automate these language installation processes:

- Extract and Install Package
- Update Planner Database
- Build, Run and Complete Installation Plan
- Launch full package build

If you decide to apply languages using Change Assistant, you can use the procedures in this chapter and skip the preceding chapter of this guide entitled: *Creating a Language-Only Installation Plan*.

Naming Convention for Installation Plans and Package Builds

The naming convention for installations plans and package builds is:

<Pathcode><PackageType><DateString><X>

where:

- <Pathcode> is the first two characters of the path code, like DV, PY, PS, PD
- Valid values for **<PackageType>** are: **F** (Full Package) or **U** (Update Package)
- Valid values for <DateString> are in this syntax: **YYMMDD**
- **<X>** is an optional character to distinguish duplicate names

To avoid naming conflicts, when the package name is defined by the System, the package name will be: PSFYYMMDD1, where 1 (X) is incremented to the next available number. After this value reaches 9, the process logs this error:

Cannot find next available package for today: MMDDYYYY

> **Note:** This process automatically defines a full package for the selected path code. It derives the Foundation, Language, and Server(s) information from the currently deployed package for this path code. If the system cannot find a deployed package in this path code, it writes this error in the log: **Cannot find deployed package for <Path Code>.**

To recover from this condition, you have three (3) options:

1. Wait and let the system launch the automatic package build for the Language Install Batch on another day.
2. Delete the package name in both JDEPLAN and DEP920 environment, then resubmit the Language Install Batch with package build.
3. Manually build and launch the package.

Reviewing Requirements for a Language Installation

To review the basic requirements for performing a language installation:

1. Review the language installation process which is described in the section of this guide entitled: *Language Process Overview*.
2. Review the disk space requirements to adequate space is available for each language and each environment that you are installing on the deployment and Enterprise Servers. The size of each language package is displayed by Change Assistant in the Space column of the returns results of available language packs as described in the following section of this procedure entitled: *Installing Languages on the Deployment Server*.
3. Review the directory structure.

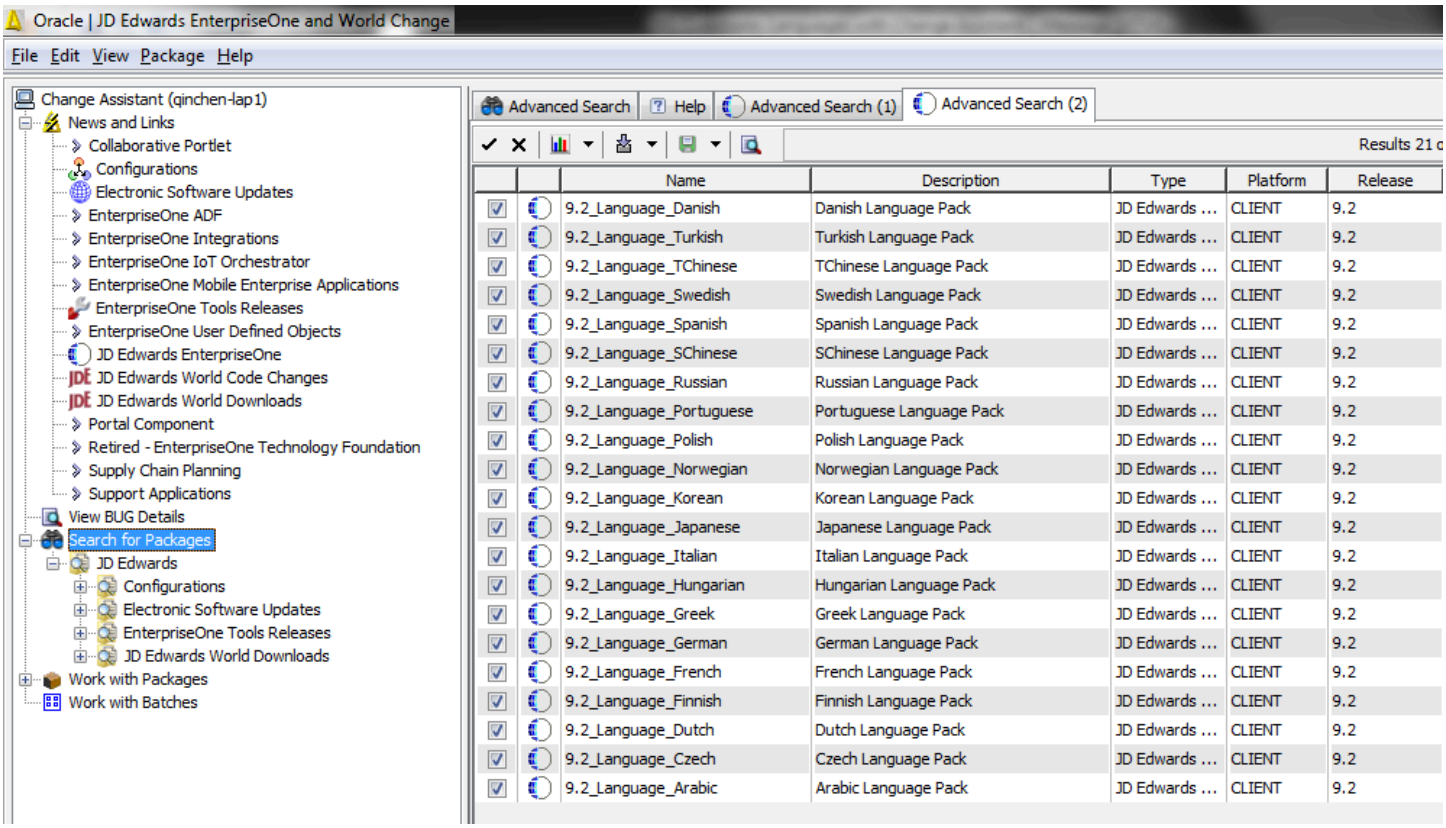
Installing Languages on the Deployment Server

To install languages on the Deployment Server:

1. Download and install the latest Change Assistant from the Update Center.

2. Using Change Assistant search on the following criteria:

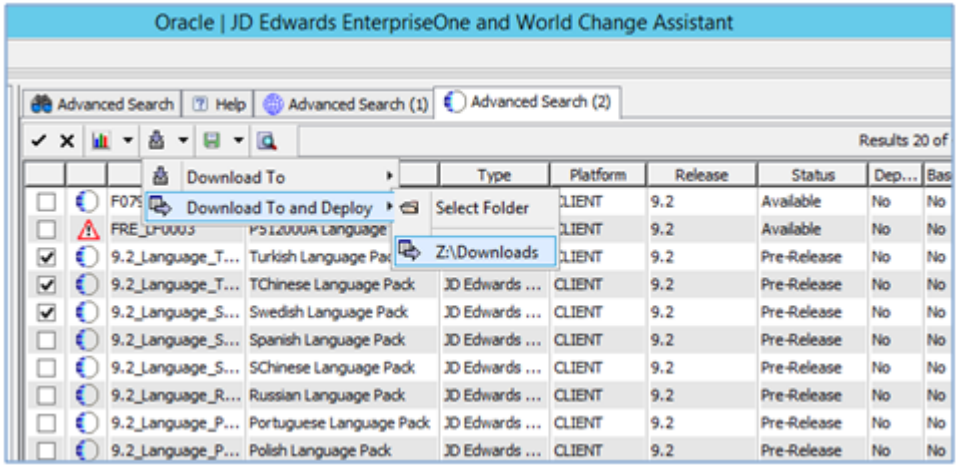
    a. **Type:** JD Edwards EnterpriseOne
    b. **Release:** 9.2
    c. **Name:** 9.2_Language_*Language_Name*



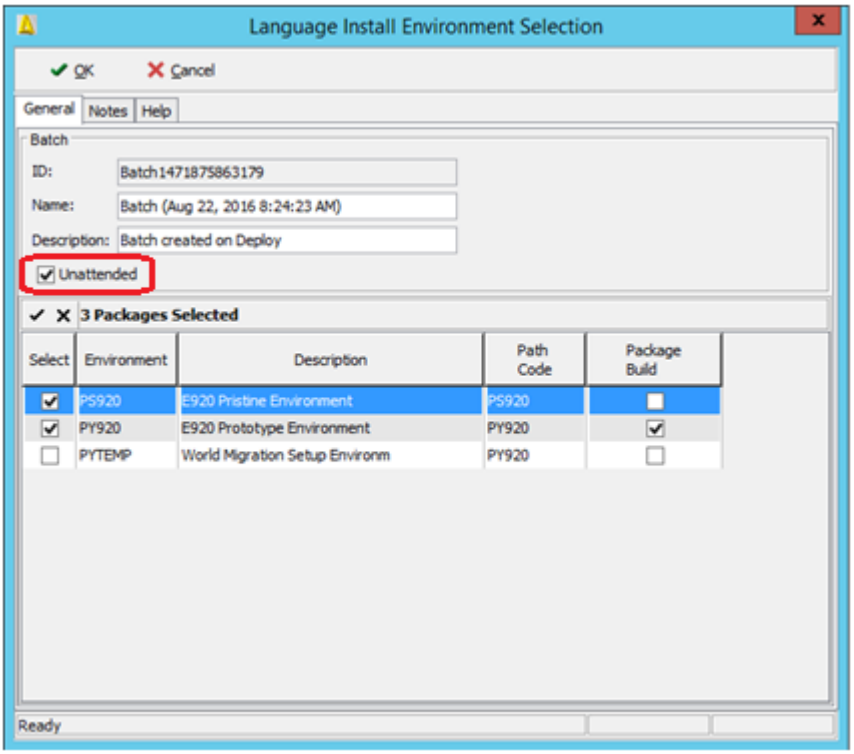
3. Select the desired language(s) by enabling the checkbox next to each language you want to install.

    Note: The size of each package is displayed by Change Assistant in the last column.

4. Click the down arrow next to the Download icon and from the fly out menu select **Download To and Deploy**, and then select a folder in which to download the language pack(s).



5. When the sign on screen displays, sign into the JDEPLAN environment.
6. On Language Install Environment Selection, select the **Unattended** checkbox.



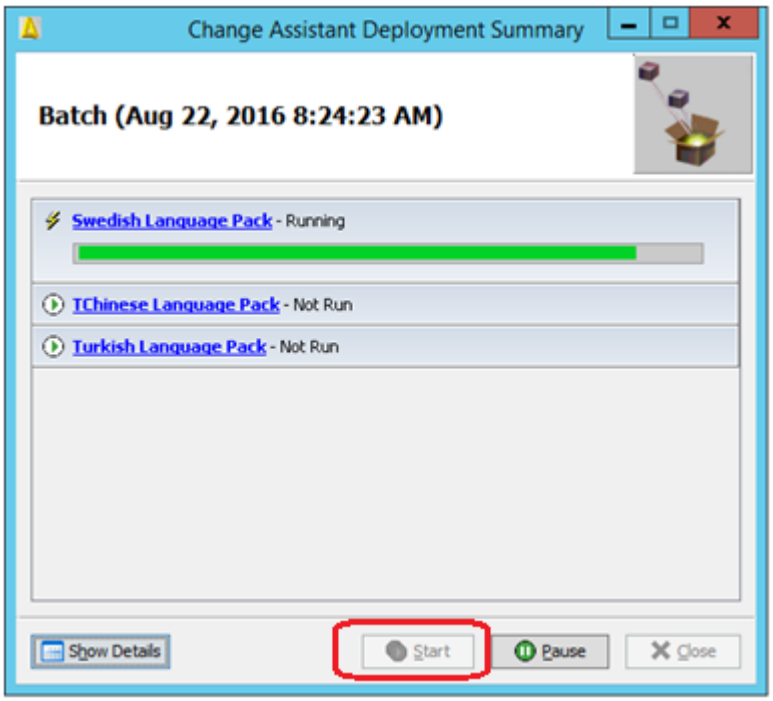
7. On Language Install Environment Selection, select the destination environments. If you select the Package Build column, Change Assistant will launch the package build after language(s) are applied. Each selected path code will have its own package build.

   Typical uses of languages are in these combinations:

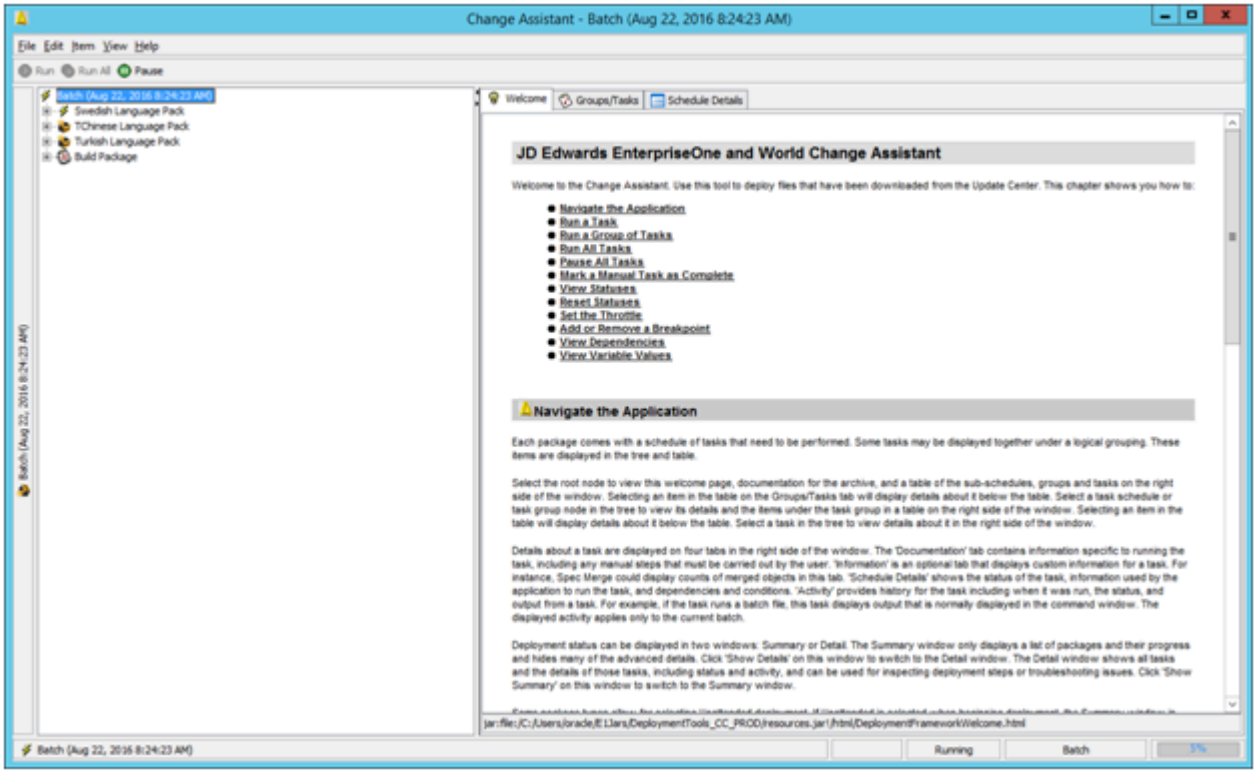
   - A single language to a single pathcode
   - A single language to multiple pathcodes

- Multiple languages to a single pathcode
- Multiple languages to multiple pathcodes

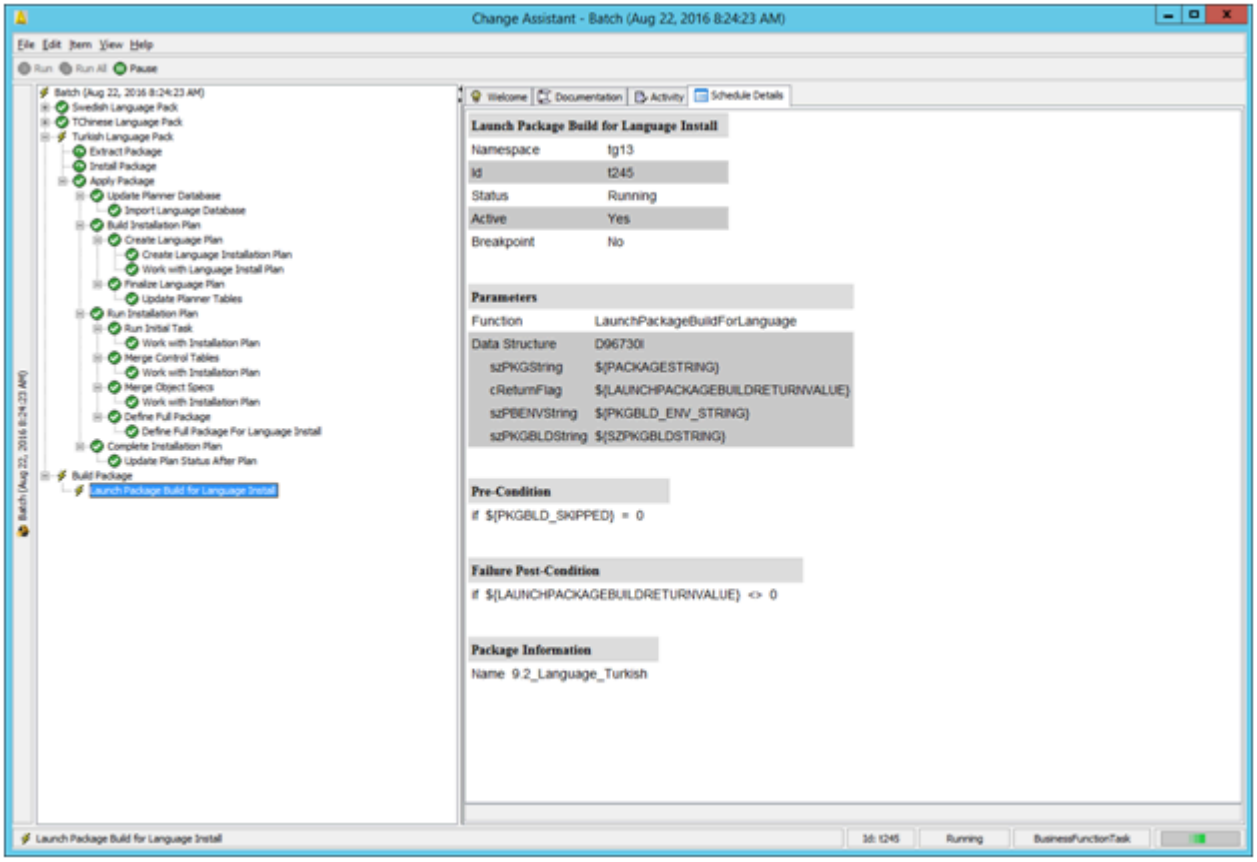
8. Click the **OK** button.



9. On Change Assistant Deployment Summary, you can click the **Show Details** button to display task status.



10. In the left pane, you can expand any of the tasks to display their current status in the right pane.

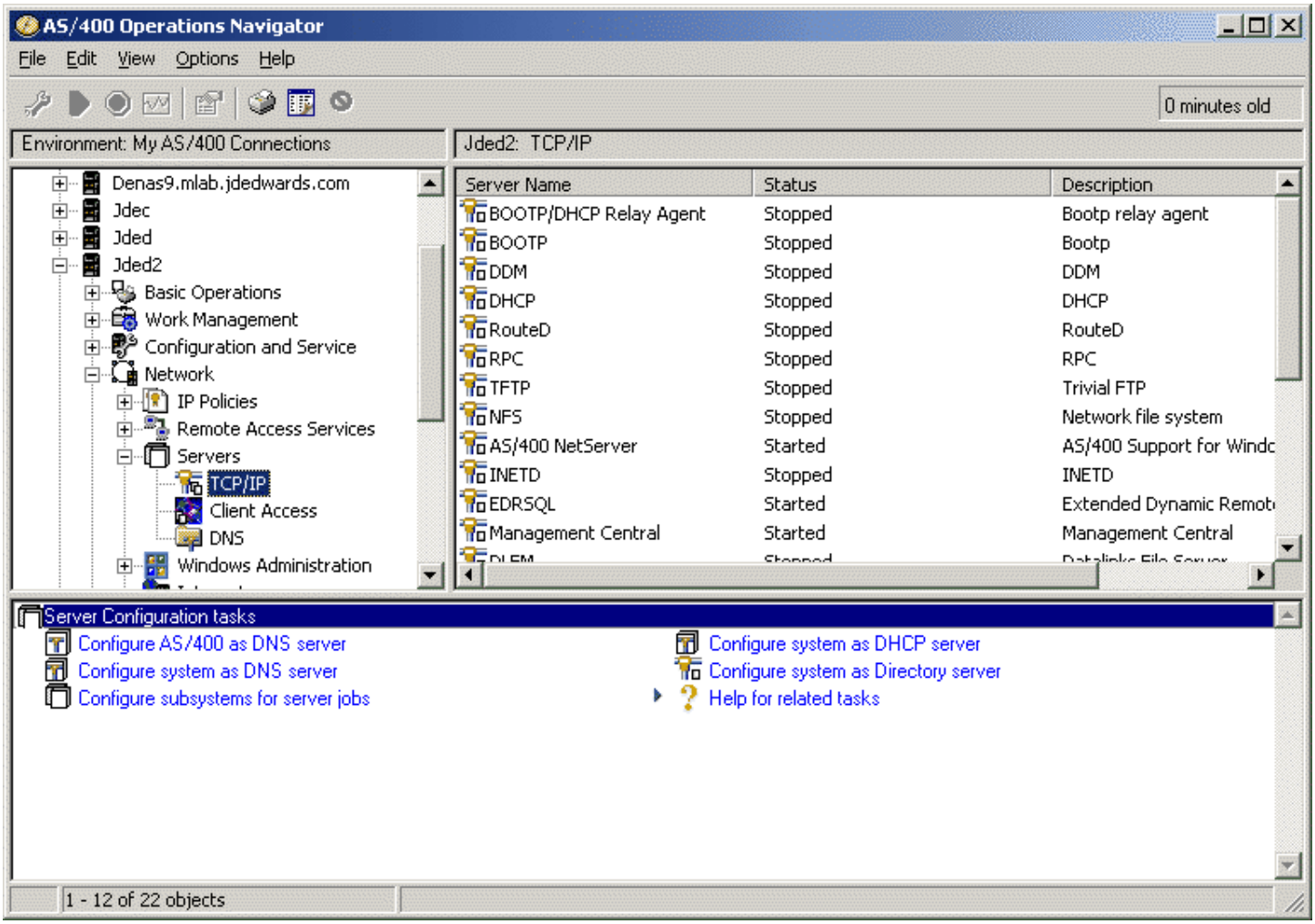


21 FTP on the IBM i

Overview of FTP on the IBM i

This chapter provides instructions on setting up FTP on your IBM i Enterprise Server for JD Edwards EnterpriseOne. Using FTP is an alternate method to transfer the unwrapped .jar file from a Microsoft Windows-machine to the IBM i machine.

Setting up FTP on the IBM i



1. Use the AS\400 Operations Navigator to open your IBM i machine node and navigate to Network > Servers > TCP\IP.

2. If the DDM server is not already started, you can manually start it using the Operations Navigator. In the right-hand pane of the Operations Navigator, in the Server Name column, highlight DDM, right-click, and choose Start.
3. Configure the FTP server. In the right-hand pane of the Operations Navigator, in the Server Name column, highlight the FTP server, right click, and choose Properties.
4. On FTP Properties, select the Initial Formats tab.
5. With the Initial Formats tab selected, ensure the following checkboxes are enabled:
    - File naming format - Path
    - Working directory - User's home directory
    - File listing format - UNIX listing format
6. Click OK to save the changes and exit the FTP Properties.

Starting the FTP Server

1. Use the AS\400 Operations Navigator to open your IBM i machine node and navigate to Network > Servers > TCP\IP.
2. In the right-hand pane of the Operations Navigator, highlight FTP, right click, and choose Start.

Copying assembly.dat to the IBM i IFS Directory (optional)

If you are not able to copy the install image from your Windows client to your IBM i because the assembly.dat file is too large, alternatively you can use FTP to transfer that file into the IFS directory.

On the Microsoft Windows client where you ran the IBM i Wrapper install:

1. Start a command window (Run | cmd), then enter this command:

    ```
    ftp machine_name
    ```

    where `machine_name` is the name of your IBM i machine.

    Enter a valid IBM i user and password when prompted to do so.
2. To indicate you want to use the IFS instead of the standard file system on the IBM i, enter this command:

    ```
    cd \
    ```

    > **Note:** This command specifies you want to put files into the IFS without changing any system settings on your IBM i, as would be the case if you entered a quote site namefmt 1 command.

3. In Microsoft Windows Explorer, drill down to the assembly.dat file in your install image on the Microsoft Windows client.

    For example, the assembly.dat file might be in a location similar to this:

    ```
    d:\disk1\install\data\E920-3ffd45216a0d2fb17cd87deda05\9.2.000
    ```

4. In the command window type this command (but do not press Enter):

   ```
   lcd
   ```

   Note: Do not press Enter at this point. Continue with the steps below to finish populating the lcd command.

5. Drag the location of the assembly.dat from Microsoft Windows Explorer results from Step 3 into the command window to append the lcd command begun in Step 4, and then press Enter to execute the lcd command.

   Your completed command will look similar to this:

   ```
   lcd d:\disk1\install\data\E920-3ffd45216a0d2fb17cd87deda05\9.2.000
   ```

6. In the command window type this command (but do not press Enter):

   cd

   Note: Do not press Enter at this point. Continue with the steps below to finish populating the cd command.

7. In Microsoft Windows Explorer, copy the location of the assembly.dat on the Microsoft Windows box from the Address bar and paste the results to append the cd command.

   Your completed command will look similar to this:

   ```
   cd address_copied_from_Windows_Explorer
   ```

8. In the command window, enter this command:

   ```
   bin
   ```

9. In the command window, enter this command:

   ```
   put assembly.dat
   ```

10. Using Microsoft Windows Explorer, verify that the size and number of files match in the Microsoft Windows install image and the IBM i install image.

22 Understanding Data Source Charts

Business Data

This chart lists the characteristics of the Business Data data source.

Field	Valid Value for Client Access
Data Source Name (list includes possible sources)	Business Data - PROD Business Data - CRP Business Data - TEST Business Data - PS920
Data Source Use	DB
Data Source Type	I
Object Owner ID	Blank
Library Name (list includes possible libraries)	*PRODDTA* *TESTDTA* *CRPDTA* *PS920DTA*
Library List Name	RDB name of the *IBM i* **Note:** To find the *IBM i* RDB name, use the WRKRDBDIRE command.
Database Name (list includes possible databases)	Business Data - PROD Business Data - TEST Business Data - CRPDTA Business Data - PS920
Server Name	Name of the machine where your database resides
Platform	*IBM i*
Use Table Owner	Blank

Field	Valid Value for Client Access
Use Julian Dates	Selected
Use Decimal Shift	Selected
Support for Updates	Selected
OCM Data Source	Blank
LOB Data Source	Selected
IBM i BLOB Support	Blank

Central Objects

This chart lists the characteristics of the Central Objects data source.

Field	Client Access
Data Source Name (list includes possible sources)	Central Objects - PY910 (for CRP) Central Objects - PS920 (for Prist) Central Objects - PD920 (for Prod) Central Objects - DV910 (for Dev)
Data Source Use	DB
Data Source Type	I
Object Owner ID	Blank
Library Name (list includes possible libraries)	*COPD920* (for Prod) *COPY920* (for CRP) *COPS920* (for Prist) *CODV920* (for Dev)
Library List Name	RDB name of the *IBM i* **Note:** To find the *IBM i* RDB name, use the WRKRDBDIRE command.

Field	Client Access
Database Name (list includes possible databases)	Central Objects - PY910 Central Objects - PS920 Central Objects - PD920 Central Objects - DV910
Server Name	Name of the machine where your database resides
Platform	*IBM i*
Use Table Owner	Blank
Use Julian Dates	Selected
Use Decimal Shift	Selected
Support for Updates	Selected
OCM Data Source	Blank
LOB Data Source	Selected
IBM i BLOB Support	Blank

Control Tables

This chart lists the characteristics of the Control Tables data source.

Field	Client Access
Data Source Name (list includes possible sources)	Control Tables - Prod Control Tables - CRP Control Tables - PS920 Control Tables - Test
Data Source Use	DB
Data Source Type	I

Field	Client Access
Object Owner ID	Blank
Library Name (list includes possible libraries)	PRODCTL CRPCTL *PS920CTL* TESTCTL
Library List Name	RDB name of the *IBM i* **Note:** To find the *IBM i* RDB name, use the WRKRDBDIRE command.
Database Name (list includes possible databases)	Control Tables - Prod Control Tables - CRP Control Tables - PS920 Control Tables - Test
Server Name	Name of the machine where your database resides
Platform	*IBM i*
Use Table Owner	Blank
Use Julian Dates	Selected
Use Decimal Shift	Selected
Support for Updates	Selected
OCM Data Source	Blank
LOB Data Source	Selected
IBM i BLOB Support	Blank

Data Dictionary

This chart lists the characteristics of the Data Dictionary data source.

Field	Client Access
Data Source Name	Data Dictionary - 920
Data Source Use	DB
Data Source Type	I
Object Owner ID	Blank
Library Name	*DD920*
Library List Name	RDB name of the *IBM i* **Note:** To find the *IBM i* RDB name, use the WRKRDBDIRE command.
Database Name	Data Dictionary - 920
Server Name	Name of the machine where your database resides
Platform	*IBM i*
Use Table Owner	Blank
Use Julian Dates	Selected
Use Decimal Shift	Selected
Support for Updates	Selected
OCM Data Source	Blank
LOB Data Source	Selected
IBM i BLOB Support	Blank

Logic

This chart lists the characteristics of the Logic data source.

Field	Client Access
Data Source Name	Name of the machine where your database resides
Data Source Use	SVR
Data Source Type	I
Object Owner ID	Blank
Library Name	xMAP (where x is the release to which you are installing, such as *920*)
Library List Name	RDB name of the *IBM i* **Note:** Ensure the system value for QCCSID is 37. To find the *IBM i* RDB name, use the WRKRDBDIRE command.
Database Name	*machinename* - 920 Server Map
Server Name	Name of the machine where your database resides
Platform	*IBM i*
Use Table Owner	Blank
Use Julian Dates	Selected
Use Decimal Shift	Selected
Support for Updates	Selected
OCM Data Source	Blank
IBM i BLOB Support	Selected

Object Librarian

This chart lists the characteristics of the Object Librarian data source.

Field	Valid Value for Client Access
Data Source Name	Object Librarian - 920
Data Source Use	DB
Data Source Type	I
Object Owner ID	Blank
Library Name	*OL920*
Library List Name	RDB name of the *IBM i* **Note:** To find the *IBM i* RDB name, use the WRKRDBDIRE command.
Database Name	Object Librarian - 920
Server Name	Name of the machine where your database resides
Platform	*IBM i*
Use Table Owner	Blank
Use Julian Dates	Selected
Use Decimal Shift	Selected
Support for Updates	Selected
OCM Data Source	Blank
IBM i BLOB Support	Blank
LOB Data Source	Selected

Language

This chart lists the characteristics of the Language data source, which applies to the Oracle tablespace on the Deployment Server.

Field	Valid Value for Oracle
Data Source Name (list includes possible sources)	Language Language – *920* For example, French – *920* .
Data Source Use	DB
Data Source Type	N
Object Owner ID (list includes possible owner IDs)	Blank
Library Name	Blank
Library List Name	Blank
Database Name (list includes possible databases)	Language JDELanguage F *920*
Server Name	Local
Platform	LOCAL
Use Table Owner	Blank
Use Julian Dates	Blank
Use Decimal Shift	Blank
Support for Updates	Blank
OCM Data Source	Blank
IBM i BLOB Support	Blank

Local

This chart lists the characteristics of the Local data source, which applies to the Oracle tablespace on the Deployment Server.

Field	Valid Value for Oracle
Data Source Name (list includes possible sources)	Local *JDELocal - DV920* *JDELocal - PS920* *JDELocal - PD920* *JDELocal - PY920*
Data Source Use	DB
Data Source Type	N
Object Owner ID (list includes possible owner IDs)	dbo
Library Name	Blank
Library List Name	Blank
Database Name (list includes possible databases)	JDELocal JDEPlan *920* JDECTL *920* JDEDD *920* JDESY *920* JDEVL *920* JDEOL *920* JDEData *920*
Server Name	Local
Platform	LOCAL
Use Table Owner	Selected

Field	Valid Value for Oracle
Use Julian Dates	Selected
Use Decimal Shift	Selected
Support for Updates	Selected
OCM Data Source	Blank
LOB Data Source	Blank

OWJRNL

This chart lists the characteristics of the Journal data source.

Field	Valid Value for Client Access
Data Source Name (list includes possible sources)	*OWJRNL*
Data Source Use	DB
Data Source Type	I
Object Owner ID	Blank
Library Name	*OWJRNL*
Library List Name	RDB name of the *IBM i* **Note:** To find the *IBM i* RDB name, use the WRKRDBDIRE command.
Database Name	*OWJRNL*
Server Name	Name of the machine where your database resides
Platform	*IBM i*
Use Table Owner	Blank

Field	Valid Value for Client Access
Use Julian Dates	Selected
Use Decimal Shift	Selected
Support for Updates	Selected
OCM Data Source	Blank
IBM i BLOB Support	Blank

Server Map

This chart lists the characteristics of the Server Map data source.

Field	Valid Value for Client Access
Data Source Name	*machinename* - 920 Server Map
Data Source Use	DB
Data Source Type	I
Object Owner ID	Blank
Library Name	*SVM920*
Library List Name	RDB name of the *IBM i* **Note:** To find the *IBM i* RDB name, use the WRKRDBDIRE command.
Database Name	*machinename* - 920 Server Map
Server Name	Name of the machine where your database resides
Platform	*IBM i*
Use Table Owner	Blank
Use Julian Dates	Selected

Field	Valid Value for Client Access
Use Decimal Shift	Selected
Support for Updates	Selected
OCM Data Source	Selected
IBM i BLOB Support	Blank
LOB Data Source	Selected

System

This chart lists the characteristics of the System data source.

Field	Valid Value for Client Access
Data Source Name (list includes possible sources)	*System - 920*
Data Source Use	DB
Data Source Type	I
Object Owner ID	Blank
Library Name	*SY920*
Library List Name	RDB name of the *IBM i* **Note:** To find the *IBM i* RDB name, use the WRKRDBDIRE command.
DLL Name	Blank
Database Name (list includes possible databases)	*System - 920*
Server Name	Name of the machine where your database resides
Platform	*IBM i*

Field	Valid Value for Client Access
Use Table Owner	Blank
Use Julian Dates	Selected
Use Decimal Shift	Selected
Support for Updates	Selected
OCM Data Source	Selected
IBM i BLOB Support	Blank
LOB Data Source	Selected

Versions

This chart lists the characteristics of the Versions data source.

Field	Valid Value for Client Access
Data Source Name (list includes possible sources)	Versions - PD920 Versions - PY920 Versions - DV920 Versions - PS920
Data Source Use	DB
Data Source Type	I
Object Owner ID	Blank
Library Name (list includes possible libraries)	*COPD920* *COPY920* *CODV920* *COPS920*

Field	Valid Value for Client Access
Library List Name	RDB name of the *IBM i* **Note:** To find the *IBM i* RDB name, use the WRKRDBDIRE command.
DLL Name	Blank
Database Name (list includes possible databases)	Versions - PD920 Versions - PY920 Versions - DV920 Versions - PS920
Server Name	Name of the machine where your database resides
Platform	*IBM i*
Use Table Owner	Blank
Use Julian Dates	Selected
Use Decimal Shift	Selected
Support for Updates	Selected
OCM Data Source	Blank
IBM i BLOB Support	Blank
LOB Data Source	Selected

23 Major Technical Tables

Major Technical Tables

This chapter lists the major technical tables in the *Release 9.2* data sources. This chapter does not list any *Release 9.2* application tables. All technical media storage objects (GTxxx) are listed at the end of this chart. Many tables exist in multiple data sources. Some tables exist in data sources not noted here.

Note: The Local - pathcode data source refers only to local databases that are path code specific. In the chart below, Local - pathcode could represent more than one data source, depending on the number of path codes you use. Pathcode is one or more of the following path codes:

- *PY920*
- *DV920*
- *PS920*
- *PD920*
- *DEP920*

Note: The Local data source refers only to the local database on the Deployment Server, which is used by the planner environment.

* Specific tables in the list below reflect language information, and contain a language preference code that is translated by *JD Edwards EnterpriseOne* .

Table	Data Source	Description	Purpose
F0004D*	Control Tables	UDC - Alternate Language	Contains the User Defined Code (UDC) key, language key, and text for headers in the F0004 table. Provides UDC type descriptions for alternate languages.
F0005D*	Control Tables	UDC - Alternate Language	Contains UDC key, language key, and text for detail in the F0005 table. Provides UDC value descriptions for alternate languages.
F00165*	Business Data - Data Dictionary - 920Object Librarian - 920 Business	Media Objects storage	Stores text OLE references and image references. Stores glossary text and media objects for all languages.

Table	Data Source	Description	Purpose
	Data Local Data Dictionary Local Object Librarian Local		
F0092	*System - 920* *Planner - 920* System Local	Library List - User	Contains one record per user with initial menu, initial program, and whether to enable fast path.
F00921*	*System - 920* *Planner - 920* System Local	User Display Preferences	Contains one record per user with date format, date separator, DW prefix, and language preference.
F00922	*System - 920* *Planner - 920* System Local	User Display Preferences Tagfile	Contains one record per user with Development Client configuration name. This table is used with the F00050 table.
F00924	*System - 920* *Planner - 920* System Local	User Install Packages	Contains one record per user for each authorized package.
F0093	*System - 920* *Planner - 920* System Local	Library List Control	Contains a list, by user, of authorized environments.
F0094	*System - 920* *Planner - 920* System Local	Library List Master file	Contains master file information for an environment.
F00941	*System - 920* *Planner - 920* System Local	Environment Detail - EO	Contains one record per environment, with release and path code.
F00942	*System - 920* *Planner - 920* System Local	Object Path Master file	Contains one record per path code with the data source for the specification files and the server path for the other development objects (.DLL, source, headers).

Table	Data Source	Description	Purpose
F00945	*System - 920* *Planner - 920* System Local	Release Master	Contains one record per release, with the data source for system tables and the environments server path.
F00946	*System - 920* *Planner - 920* System Local	Release Compatibility Map	Contains information used to map major release levels to determine forward and backward compatibility.
F00948	*System - 920* *Planner - 920* System Local	Release Data Source Map	Contains information used to map a specific type of data source to a release level, such as Object Librarian, data dictionary, or versions list data sources.
F00950	*System - 920* System Local	Security Workbench table	Stores security attributes (one record for each user or group).
F00960	*System - 920* System Local	Machine/Group Identification	Stores a list of all Development Clients that installed Release 8.9 to scheduled packages.
F83100*	*System - 920* System Local	Data Title	Series of definitions of data titles. Each row is the definition or specification of the date title. Provides soft coded RDA text.
F83110*	*System - 920* System Local	Column Headings	Gives each period number an associated description. Provides soft coded RDA text.
F9100	Control Table	Task Master	Lists Release 8.9 tasks (Solution Explorer only).
F9101	Control Table	Task Relationships	Groups tasks listed in the F9100 table in logical (parent/child) tree order (ActivEra only).
F9102	Control Table	Task Descriptions	Provides descriptions of tasks listed in the F9100 table (ActivEra only).
F9105	Control Table	Variant Description	Describes the attributes of variants listed in this table. A variant performs a series of designated tasks (nodes) within a tree order defined in the F9101 table (ActivEra only).
F9105D	Control Table	Alternate Variant Descriptions	Provides translated text for descriptions listed in the F9105 table (ActivEra only).

Table	Data Source	Description	Purpose
F9106	Control Table	Variant Detail	Defines which nodes (tasks) are run within a variant and the names of any tasks dynamically renamed within a variant (ActivEra only).
F9106D	Control Table	Alternate Variant Detail Descriptions	Provides translated text for descriptions listed in the F9106 table (ActivEra only).
F9010	Control Table	Environment Setup Answers	
F9020	Control Table	ActivEra Qualifier Rules Header	Defines rule names used by ActivEra. Rules are applied to conditionally execute an individual task or task relationship (tree order).
F9022	Control Table	ActivEra Qualifier Rules Detail	Lists conditional statements within rules listed in the F9020 table (ActivEra only).
F9030	Control Table	Documentation Cross-reference	Stores indexes of HTML documents associated with specific tasks (ActivEra only).
F9050	Control Table	Rough-cut Answer Dependency	Defines the hierarchical means of eliminating system codes and subsequent applications which do not apply within a specified system configuration (ActivEra only).
F91100	*System - 920*	Favorites - Relationship Properties	Categorizes business views on a parent/child format.
F91100D*	*System - 920*	Favorites - All Descriptions	Stores alternate descriptions for different languages.
F91300	*System - 920*	Scheduled Job Master	
F91310	*System - 920*	Scheduled Job Parameters	
F91320	*System - 920*	Job Schedule	
F91330	*System - 920*	Scheduled Job Override Printer Info	
F91400	*System - 920*	Report Director Templates	Contains the design templates for reports that users can create.
F91410	*System - 920*	Report Director Templates Sequence Items	Helps users manipulate data sequencing.
F91420	*System - 920*	Report Director Template Smart Field Activation	Creates a list showing all data items belonging to a smart field template.

Table	Data Source	Description	Purpose
F91430	*System - 920*	Smart Field Template Criteria	Stores a subset of selection criteria.
F91500	*System - 920*	Application Header for Tip of the Day	Contains application names or tools names where tips reside.
F91510	*System - 920*	Tip Details for Tip of the Day	Stores tip texts and a key to modify the sequence.
F9200	Data Dictionary Data Dictionary Local	Data Item Master	Contains the relational breakdown of data dictionary.
F9202*	Data Dictionary Data Dictionary Local	Data Field Display Text	Contains display text for each data field for language, data item, and product code reporting. Used when data items descriptions requested. Data dictionary row and column text for all languages* * The language preference code for data dictionary applies to text only. Text includes row and column headings, a compressed description, and glossaries.
F9203*	Data Dictionary Data Dictionary Local	Data Item Alpha Descriptions	Contains alpha descriptions and compressed descriptions of data items. Used when data items descriptions requested. Similar to the F9202 table. Contains data dictionary alpha descriptions for all languages.
F9207	Data Dictionary Data Dictionary Local	DD Error Message Information	Contains one record per error message.
F9210	Data Dictionary Data Dictionary Local	Data Field Specifications	Contains detailed information (specifications) for each data item. This table is accessed whenever a data item needs to be identified.
F9211	Data Dictionary Data Dictionary Local	Data Dictionary - Smart Fields	Contains information for Smart Fields.
F9212	Data Dictionary - 920 Data Dictionary Local	Smart Field Criteria - Setup Rules	
F96021	*System - 920*	Software Package Build Header	Stores the detail information from the definition process of package build.
F9603	*System - 920*	Software Package Build Header	Stores information from the assembly process of package build.

Table	Data Source	Description	Purpose
F96210	*System - 920* System Local	Package Build Validation Tables	
F96211	*System - 920* System Local	Package Build Validation Detail	
F96215	*System - 920* *Planner - 920* System Local	Software Package Build Header History	Contains the history record of the F96021 record. It stores statuses of the package each time it is built.
F9622	*System - 920* *Planner - 920* System Local	Software Package Build Detail	Stores the option information from the definition process of package build. Each record is either the name of the specification file, the name of a .DLL file, the name of the compression directory, or the name of an object.
F96225	*System - 920* *Planner - 920* System Local	Software Package Build Detail History	Contains the history record of the software build program (P9622). Stores the status of the build on the operation of that record when the package is finished.
F9631	*System - 920* *Planner - 920* System Local	Software Package Detail	Stores the detail information for the assembly process of package build. Stores the object names, foundation name, data name, or helps name.
F9650	*System - 920* *Planner - 920* System Local	Machine Master	Holds the default information regarding all machines used by *JD Edwards EnterpriseOne* .
F9651	*System - 920* *Planner - 920* System Local	Machine Detail	Holds specific information about each machine defined in the machine master table by record type.
F9652	*System - 920* *Planner - 920* System Local	Deployment Group Header	Specifies groups that can be used by the *Release 9.2* administrator for deploying packages.
F9653	*System - 920* *Planner - 920*	Deployment Group Detail Definitions	Stores the users that belong to one or more groups that were defined in the deployment header file. In addition, groups of groups can be defined here.

Table	Data Source	Description	Purpose
	System Local		
F9654	*System - 920* *Planner - 920* System Local	Deployment Location Definitions	Enables definition of one or more locations for deployment. This table is used primarily in multitier deployment.
F9660	*System - 920* *Planner - 920* System Local	Task Breaks	
F96600	*System - 920* *Planner - 920* System Local	Deployment Features	
F96601	*System - 920* *Planner - 920* System Local	Deployment Registry	
F96602	*System - 920* *Planner - 920* System Local	Deployment Shortcut	
F96603	*System - 920* *Planner - 920* System Local	Deployment Execute	
F96604	*System - 920* *Planner - 920* System Local	Deployment Third Party	
F96605	*System - 920* *Planner - 920* System Local	Deployment Initialization	
F96605T	*System - 920* *Planner - 920*	Deployment Initialization	

Table	Data Source	Description	Purpose
	System Local		
F96606	*System - 920* *Planner - 920* System Local	Deployment File Set	
F966071	*System - 920* *Planner - 920* System Local	Deployment ODBC Data Source	
F966072	*System - 920* *Planner - 920* System Local	Deployment ODBC Data Source Attributes	
F9670	*System - 920* *Planner - 920* System Local	Software Update Master Table	
F9671	*System - 920* *Planner - 920* System Local	Software Update Detail Table	
F96710	*System - 920* *Planner - 920* System Local	Impact Analysis Results	
F9672	*System - 920* *Planner - 920* System Local	Software Update Pathcode Information	
F96761	*System - 920* *Planner - 920* System Local	Software Update Object Detail	
F967611	*System - 920* *Planner - 920*	Software Update Language Table	

Table	Data Source	Description	Purpose
	System Local		
F9691100	System Local	Change Table - Favorites	Stores adds, changes, and deletes to favorites tables between releases.
F9691400	System Local	Change Table - Report Director Template Header	Stores adds/changes/deletes to the Report Director template header table between releases.
F9691410	System Local	Change Table - Report Director Template Sequence	Stores adds/changes/deletes to the Report Director Template Sequence table between releases.
F9691420	System Local	Change Table - Smart Field Activity	Stores adds/changes/deletes to the Smart Field Activity table between releases.
F9691430	System Local	Change Table - Smart Field Criteria	Stores adds/changes/deletes to the Smart Field Criteria table between releases.
F9746	System Local	UDC Merge table	Contains the UDC records changed or added from release to release. This table is used by the UDC merge program (R98741).
F960004	Control Tables - xxx Control Tables Local	UDC Type	
F960005	Control Tables - xxx Control Tables Local	UDC Codes	
F9755	Data Dictionary - 920 Data Dictionary Local	Data Item Master Changes by Release	Contains the data dictionary items changed or added from release to release. This table is used by the Data Dictionary merge program (R989200P).
F9757	Data Dictionary - 920 Data Dictionary Local	Data Item Alpha Description Changes by Release	Lists changes made to alpha descriptions of data items (F9203) between releases. This table is used in the data dictionary merge process.
F9759	Data Dictionary - 920 Data Dictionary Local	Error Message Pgm Call Changes By Release	Lists changes made to error messages (F9207) between releases. This table is used in the data dictionary merge process.
F9760	Data Dictionary - 920 Data Dictionary Local	Data Field Specification Changes By Release	Lists changes made to field specifications (F9210) between releases. This table is used in the data dictionary merges.
F980011	Central Objects - xxx Versions Local	Cross ' Reference Relationships	Lists cross-reference relationships for business views, event rules, and controls.

Table	Data Source	Description	Purpose
F980021	Central Objects - xxx Versions Local	Cross ' Reference Field Relationships	Lists cross-reference relationships for fields in an application.
F98101	*System - 920* System Local	Imaging Constants	Determines whether you are doing third-party imaging.
F983051	Versions - xxx Versions Local	Versions List	Contains one record per version (batch or interactive). For interactive, it stores processing option values. For batch, this table holds data selection, sequencing, and other template overrides.
F982xx	*System - 920* System Local *Planner - 920*	Series (OMW)	
F98306*	Central Objects - xxx Versions Local	Processing Option Text	Provides processing option text for all languages.
F9840	Version - 920 *Planner - 920*	Installation Plan Master table	Contains general information for the installation plan with one record per plan name (description and status).
F98401	Version - 920 *Planner - 920*	Data Source Plan Detail table	Lists data sources for each plan, and one record per plan record per data source associated with that plan.
F98402	Version - 920 *Planner - 920*	Host Plan Detail table	Lists the Enterprise Server and hosts for each plan (one record per plan, per server).
F984021	Version - 920 *Planner - 920*	Location Plan Detail table	Contains the last location for a plan.
F984022	Version - 920 *Planner - 920*	Replication Plan Detail table	Stores replicated plan for remote locations, publisher, and subscriber tables.
F98403	Version - 920 *Planner - 920*	Environment Plan Detail table	Lists environments for each plan. Holds flags for production data, demo data, and table conversions for an upgrade.
F984031*	Version - 920 *Planner - 920*	Language and Environment Plan Detail table	Lists language and the selected environments for each plan.

Table	Data Source	Description	Purpose
F98404	Version - 920 *Planner - 920*	Package Plan Detail table	Lists packages and package definitions for each environment.
F98405	Version - 920 *Planner - 920*	Table Conversion Scheduler	Lists table conversion information merged in Table Conversion Scheduler from Environment Planner and Table Conversion Planner. This table is similar to the F9843 table.
F984052	Version - 920 *Planner - 920*	Table Conversion - History Log	Stores the logs for table conversions, control table merges, and specification merges.
F9843	*System - 920*	Table Conversion - JDE Scheduler	Contains table conversions, control table merges, and specification merges for upgrades, updates, and coexistent installations.
F9843T	*System - 920*		
F98511	*System - 920* *Planner - 920*	REP Data Sources by Environment	Lists default data sources by environment. This table is used during installation.
F9860	Object Librarian Object Librarian Local	Object Librarian Master table	Contains one record per object with description and object type.
F9861	Object Librarian Object Librarian Local	Object Librarian - Status Detail	Contains one record per object, per location, per path code. Each object has a server location plus locations for each person who checks it out to his machine.
F986101	*System - 920* Server Map *Planner - 920* System Local	Object Configuration Master	Contains all data sources for tables, batch applications, and business functions that run on the server. The only data sources not controlled through this file are the system data source in Release Master and the Development data source in object path master.
F98611	*System - 920* Server Map *Planner - 920* System Local	Data Source Master	Holds data source definitions. One record per data source with type, database, machine name, and foundation .DLL.
F986110	*System - 920* Server Map		Contains one record for each job on the server with status information.

Table	Data Source	Description	Purpose
	Planner - 920 System Local		
F986111	*System - 920* Server Map *Planner - 920* System Local	Job Number Master	Contains the next numbers table for server jobs.
F986113	*System - 920* Server Map *Planner - 920* System Local	Subsystem Job Master	Contains server job records, including status, location, and version.
F986115	*System - 920* Server Map *Planner - 920* System Local	Table and Data Source Sizing table	Holds storage, sizing, and location parameters for Oracle, with some general information for all data sources.
F986116	*System - 920* Server Map *Planner - 920* System Local	MVS table and Data Source Sizing	Holds storage, sizing, and location parameters for MVS. Similar to the F986115 table.
F98613	*System - 920* Server Map *Planner - 920* System Local	Business View Environmental Server	Lists cached tables.
F986150	*System - 920* System Local	Server Transfer Package Contents	Lists objects belonging to each server package. This table is used by the server package installation process (P986150).
F986151	*System - 920* System Local	Server Package Transfer	Lists the servers and path codes to which a given server package will be transferred. This table is used by the server package install process (P986150).

Table	Data Source	Description	Purpose
F986152	*System - 920* System Local	Server Package Master	Contains the master list of all service packages. This table is used by the server package install process (P986150).
F98616	*System - 920* System Local	Printer	Lists the printer definitions, including logical name, physical name, and conversion program, one record per printer.
F986161	*System - 920* System Local	Default Printer table	Lists default printer settings by user and environment.
F986162	*System - 920* System Local	Paper Definition	Lists paper sizes defined for each printer, one record per printer.
F986163	*System - 920* System Local	Printer Capability	Lists printer capabilities (paper orientation and size, type and location of printer) for each printer, one record per printer.
F986164	*System - 920* System Local	Output Conversions	Lists printer output conversions defined for each printer, one record per printer.
F986165	System Shared	New Default Printer Table	Stores the default printer information including the user, environment, host name, printer name, and the status.
F986167	*System - 920* System Local	Printer Security	Reserved for future use.
F9862	Object Librarian Object Librarian Local	Object Librarian - Function Detail	Lists one record for each function contained in the source file.
F9863	Object Librarian Object Librarian Local	Object Librarian - Object Relationships	Contains one record per business function per related object. This table is used when building business functions.
F9865	Object Librarian Object Librarian Local	Form Information	Contains one record per interactive form, including online help information.
F98710	Central Objects Specifications	Table Header	Holds table-specific information for tables created in TDA (BOBSPEC).
F98711	Central Objects Specifications	Table Columns	Holds all column information for the table in TDA (DDCLMN).

Table	Data Source	Description	Purpose
F98712	Central Objects Specifications	Primary Index Header	TDA - Information pertaining to the primary index.
F98713	Central Objects Specifications	Primary Index Detail	TDA - All fields that make up the primary index.
F98720	Central Objects Specifications	Business View Specifications	Holds all business-view specific information from BDA.
F98740	Central Objects Specifications	Event Rules - Link	Stores header file for event rules.
F98741	Central Objects Specifications	Event Rules - Specification	Contains actual event rules detail for a form.
F98743	Central Objects Specifications	Data Structure Templates	Contains one record for each template, for example, Data Structure for Business Function.
F98744	Central Objects Specifications	Media Object	Contains media object text for tools.
F98745	Central Objects Specifications	Smart Field Named Mappings	Contains smart field named mappings.
F98750*	Central Objects Specifications	FDA Text Information	Contains form design text for all languages for any generated application.
F98751	Central Objects Specifications	FDA Specification Information	Contains specifications for an application.
F98752	Central Objects Specifications	FDA/SVR Header Information	Contains summary information about each application.
F98753	Central Objects Specifications	FDA/SVR Detail Information	Contains summary information about each form for each application.
F98760*	Central Objects Specifications	RDA Text Information	Holds records that contain the report design aid text for all languages.
F98761	Central Objects Specifications	RDA Specification Info	Holds records that contain report design aid setup information.
F98762	Central Objects Specifications	JDEBLC - Behavior Information	Contains business function specifications.
F9882	*System - 920*	Checkout Log table	Logs all transactions that take place to objects.

Table	Data Source	Description	Purpose
	Planner - 920 System Local		
F98825	*System - 920*	Package Deployment Scheduling	Contains information for deploying client packages, such as group user ID and package assignment.
F9883	*System - 920*	*Release 9.2* Network Locations table	Contains information for deploying server packages, such as package assignments.
F9885	*System - 920* System Local	Install Package Header	Contains one record per package.
F9886	*System - 920* System Local	Install Package Detail	Contains one record per package per product code or object to be included in the package.
F9887	*System - 920* System Local	Install Package Build History	Lists each time the package is built.
F9888	*System - 920* *Planner - 920* System Local	Merge Log	Contains temporary message logging for merges.
F98800D*	Control Tables	Process Master - Alternative Description	Contains multiple language information for the F98800 table.
F98800T	Control Tables	Process Master Supplemental Information	Categorizes Composer processes.
F98810D*	Control Tables	Activity Master - Alternative Description	Contains multiple language information for the F98810 table.
F98810	Control Tables	Activity Master	Contains workflow activity information.
F98811	Control Tables	Activity Specifications	Contains workflow activity specifications stored as event rules.
F98830	Control Tables	Process Activity Associations	Contains workflow activity relationships.
F98840	Control Tables	Organizational Structure Master	Contains the defining data for organizational models.

Table	Data Source	Description	Purpose
F98845	Control Tables	Organizational Structure Rule	Contains the data that ties workflows to organizational models.
F98860	Control Tables	Process Instance	Contains the instances of workflow processes.
F98865	Control Tables	Activity Instance	Contains the instances of workflow activities within processes.
F98881	*System - 920* System - Local	Specification Merge Logging	Contains logging information generated from the Specification Merge for upgrade, update, and the Specification Merge and Object Librarian Merge reports.
F9889	*System - 920* System - Local	Deployment Location Master	Lists records for each tier with system and help information. This table is used only for multitier deployment.
F98891	*System - 920* System - Local	Deployment Location Path Code	Lists records with packages and help information. This table is used only for multitier deployment.
F98892	*System - 920* System - Local	Package Deployment Scheduling	Lists scheduling information for a multitier environment.
F98950	Central Objects Specifications System - Local	User Overrides table	Contains application version information: application, version, and user who entered it.
F98980	*System - 920* System - Local	Font Override by Language	Lists languages with information on corresponding display fonts.
F98BLOB	*System - 920*	*DB2 for IBM i* BLOB Support	
F98CONST	*System - 920* System - Local	Table of Constants	Lists constants for report design aid and form design aid.
F98DRENV	*System - 920* *System - Planner*	Data Replication Environment Mapping table	Determines which path codes to update for data dictionary replication.
F98DRLOG	*System - 920* Server Map *System - Planner*	Data Replication Change Log	Contains one record for each replicated change. The table information is stored as a BLOB.

Table	Data Source	Description	Purpose
F98DRPCN	*System - 920* Server Map *System - Planner*	Data Replication Pending Change Notifications	Contains one record for each replicated change for each subscriber. Records are deleted as subscribers are notified.
F98DRPUB	*System - 920* *System - Planner*	Data Replication Publisher	Lists definitions of published objects.
F98DRSUB	*System - 920* *System - Planner*	Data Replication Subscribers	Defines each subscriber.
F98EVDTL	*System - 920* System - Local	Event Detail file	Filters events displayed in Form Design Aid (FDA) or Universal Batch Engine (UBE) design.
F98EVHDR	*System - 920* System - Local	Event Header file	Stores event description and event ID. This table is used for all event rules.
F98MOQUE	*System - 920* System - Local	Media Object Queues	Contains path codes to locations of multimedia objects.
F98OWSEC	*System - 920* System - Local	*Release 9.2* Security	Contains the security tables that store the *Release 9.2* user name and password for obtaining database user and password for certain data sources.
F98TMPL	*System - 920* System - Local	Templates	
F98VAR	*System - 920* System - Local	Table of Variables	Contains commonly used event rule variables.
GT92002	Data Dictionary	Data Dictionary - Glossary Information	Contains column in data dictionary with descriptions of data dictionary items.
GT9860A	Object Librarian	Object Librarian Generic Text Structure	Contains notes for objects in the Object Librarian.
GT9862A	Object Librarian	Business Function Notes	Contains notes for business functions.
GT98DSA	Object Librarian	Data Structure Notes - Structure and Item	Contains notes for data structures.

Table	Data Source	Description	Purpose
GT98DSB	Object Librarian	Data Structure Notes - Structure and Item	Contains notes for data structures.
GT98TMPL	Object Librarian	Media Object Templates	Contains templates that can be used for any attachment.

24 Working with Reports

Working with Reports

During the installation, upgrade, and cumulative update processes, *JD Edwards EnterpriseOne* creates reports that show detailed information about the plan and summarize the status of the environment builds. During upgrades and cumulative updates, additional reports summarize the status of tables merges.

Installation Planner Validation Report (R9840B)

Note: This report is used by installation, upgrade, and cumulative update customers.

All processes use version XJDE0001 of this report.

The Installation Planner Validation report summarizes the status of the installation plan and verifies that the plan information is correct before you run the Installation Workbench

Setting Processing Options

The Extra Info tab contains these options:

Option	Value
Additional data source information flag	Enter *Y* to include additional information.
OCM Information Flag	Enter *Y* to see all Object Configuration Manager (OCM) information for the current data selection. Enter *D* to select all default records. Enter *N* to prevent OCM records from being displayed.
OCM Differences Flag	Enter *Y* to see OCM differences between the new environment and the previous environment.
Path Code Information Flag	Enter *Y* to display all path code information for the plan(s) in the data selection
Update the Plan Status (10 – 60)	Enter *30*

How to Read the Report

Use the Installation Planner Validation report summary section to review basic information about the installation, upgrade, or cumulative update; the number of records validated; and the types of processes run.

Review the main body of the report to verify that each data source, machine, and package build in the plan was created successfully. To verify, each detail line should have the value *Record Validated* in the far right column.

The report includes the status of the following record types:

- Location
- Data sources (listed by database type)
- Environments
- Path codes
- Object Configuration Manager (OCM)
- Machines
- Table conversions
- Control table merges
- Specification table merges
- Packages

A summary should appear at the end of the report verifying that all records were validated and the plan status was updated to 30.

Table and Index Creation (R98407)

JD Edwards EnterpriseOne creates a report for each environment that is being upgraded. It creates new tables and indexes and recreates changed tables and indexes based on the F9698710 and F9698712 tables. It also reads the F9843 table to regenerate additional tables that do not have spec changes or to prevent regeneration of tables or indexes that will be converted in table conversion workbench or in post-workbench conversions.

The R98407 program creates a log of the actions it will perform against the database. The log table is the F984072 table. When the R98407 program is rerun it creates any items that are not at successful status and prints all items on the report.

Environment Database Creation Report (R98403)

Release 9.2 creates an Environment Database Creation report for each environment that is part of your plan. For each environment, you can choose to load either production or demonstration data.

Users performing installations and upgrades should run version XJDE0001.

Users performing cumulative updates should run version XJDE0004.

Upgrade users should run XJDE0005 because the update process updates only generic text. When running against pristine data, these users should run version XJDE0024.

The environment database creation copies the System data source (previous release) to the *System - 920* data source. The System data source is release specific. The report is read and errors are processed in the same way as they are for the regular Environment Database Creation.

Setting Processing Options

These processing options are the typical processing options for each version of the Environment Database Creation report.

Version XJDE0001 for Installations and Upgrades

The Environment Tab contains these options:

Option	Values
Enter the Environment for the database to be created.	Leave this field blank.
Enter the Data Source for the database to be created.	Leave this field blank.
Enter a 1 to load Production Data or a 2 to load Demonstration Data.	Enter *2*. The default is *1*. If this report is called from another process, the system passes in this flag.
Enter the source Data Source for Loading of Data.	Enter *OneWorld Local*. If this report is called from another process, the system passes in this flag.
Enter the Source Environment for the database to be copied from.	Leave this field blank. If this report is called from another process, the system passes in this flag.

The Update Tab contains the following options:

Option	Value
Enter a 1 for Proof Mode or a 2 to create the Environment Database.	Enter **2**. The default is Proof Mode.
Enter a A to recreate existing tables in data sources that allow automatic table creation.	Leave this field blank. The default is not to recreate tables.
Enter a 1 to only copy tables that exist in the source data source.	Leave this field blank.

Option	Value
Enter a Y to add records without clearing the target table.	Leave this field blank. This is used for language tables. The default is to clear the target table.

The Print Tab contains these options:

Option	Value
Enter a 1 to only print exceptions.	Leave this field blank. The default is to print all lines.

The Licensing Tab contains these options:

Option	Value
Enter a Y to create all tables or a N to create licensed tables only.	Leave this field blank. The default is to create all tables.
Enter a Y to print all tables in the report or an N to print licensed tables only.	Leave this field blank. The default is to print all tables.

Version XJDE0004 for Updates

The Environment Tab contains these options:

Option	Value
Enter the Environment for the database to be created.	Leave this field blank.
Enter the Data Source for the database to be created.	Leave this field blank.
Enter a 1 to load Production Data or a 2 to load Demonstration Data	Enter **1**. The default is to load production data. If this report is called from another process, the system passes in this flag.
Enter the source Data Source for Loading of Data.	Leave this field blank. If this report is called from another process, the system passes in the data source.

Option	Value
Enter the Source Environment for the database to be copied from.	Leave this field blank. If this report is called from another process, the system passed in the Source Environment.

The Update Tab contains these options:

Option	Value
Enter a 1 for Proof Mode or a 2 to create the Environment Database.	Enter **2**. The default is Proof Mode.
Enter a A to recreate existing tables in data sources that allow automatic table creation	Leave this field blank. The default is not to recreate tables.
Enter a 1 to only copy tables that exist in the source data source	Leave this field blank. The default is to copy all tables.
Enter a Y to add records without clearing the target table.	Enter **N**. to indicate you do not want to add records without clearing the target table. This is used for language tables. The default is to clear the target table.

The Print Tab contains this option:

Option	Value
Enter a 1 to only print exceptions.	Leave this field blank. The default is to print all lines.

The Licensing Tab contains these options:

Option	Value
Enter a Y to create all tables or an N to create licensed tables only.	Leave this field blank. The default is to create all tables.
Enter a Y to print all tables in the report or an N to print licensed tables only.	Leave this field blank. The default is to print all tables.

Version XJDE0024 for Running Pristine Data

The Environment Tab contains these options:

Option	Value
Enter the Environment for the database to be created.	Leave this field blank.
Enter the Data Source for the database to be created.	Leave this field blank.
Enter a 1 to load Production Data or a 2 to load Demonstration Data.	Enter *2*. The default is to load production data. If this report is called from another process, the system passes in this flag.
Enter the source Data Source for Loading of Data.	Enter *OneWorld Local*. If this report is called from another process, the system passes in the data source.
Enter the Source Environment for the database to be copied from.	Leave this field blank. If this report is called from another process, the system passes in the Source Environment .

The Update Tab contains these options:

Option	Value
Enter a 1 for Proof Mode or a 2 to create the Environment Database.	Enter *2*. The default is Proof Mode.
Enter a A to recreate existing tables in data sources that allow automatic table creation.	Enter *A*. The default is not to recreate tables.
Enter a 1 to only copy tables that exist in the source data source.	Leave this field blank. The default is to copy all tables.
Enter a Y to add records without clearing the target table.	Leave this field blank. This is used for language tables. The default is to clear the target table.

The Print Tab contains these options:

Option	Value
Enter a 1 to only print exceptions.	Leave this field blank. The default is to print all lines.

The Licensing Tab contains the following options:

Option	Value
Enter a Y to create all tables or a N to create licensed tables only.	Leave this field blank. The default is to create all tables.
Enter a Y to print all tables in the report or a N to print licensed tables only.	Leave this field blank. The default is to print all tables.

How to Read the Report

Review the reports to make sure the environments were created and configured successfully. The report includes a status for each table:

- Tables that have been created correctly have a status of Success.
- Tables that had errors have a status of Failure.
- Tables can have a status of No Action.

The Environment Database Creation report does not have a cover page. The reports list the following properties of each table (object) created:

Object headings	Description
Syst Code	System Code. Shows the *JD Edwards EnterpriseOne* product code for the database listed in the Member Description column.
Object Name	Displays the alphanumeric name of the database.
Member Description	Displays the full name of the database being created.
Data Source	Displays the data source toward which this member points.
Crt Tbl	Create Table. Shows whether tables are being created for this database.
Copy Data	Shows whether the table was copied with data.
Rec Insrt	Record Insert. Displays the number of records inserted.

Object headings	Description
Rec Fail	Record Failure. Displays the number of records that failed.
Copied from Data Source	Displays whether the table was copied with data and the data source from which it was copied.
Status	Displays one of the following statuses for the table creation: Success, Failure, or No Action.
Source DS Warnings	Displays any errors or warnings associated with the source data source.
Target DS Warnings	Displays any errors or warnings associated with the target data source.

Errors and How to Resolve Them

A report occasionally lists a status of Failure for tables that are created successfully. These failures are generally due to problems creating indices and are not critical for the successful installation of the software.

During an upgrade or cumulative update, you could receive failures for some tables. To confirm successful table creation, verify that the following tables were created successfully:

- F0007Z1
- F00092
- F0086
- F03B11
- F03B14
- F03B112
- F060116
- F06106
- F08042
- F08330
- F0911
- F1501B
- F1721
- F1731
- F17111
- F30006Z1
- F3002Z1
- F3003Z1
- F3460Z1
- F39062
- F4077
- F4106
- F4111

- F41508
- F4600
- F4812H
- F5215
- F7302
- F986113

Reports frequently list a status of No Action for tables the system created successfully. This status is accompanied by source and target data source warnings for these tables to explain why no action was taken. These warnings are normal and you can ignore them. The most common reasons for the warnings are because the source and target data sources are the same or the table was created by a previously installed environment.

When the source and target are the same, the report lists the following warnings:

Source data source warning	Target data source warning
Source Same as Target	Existing table

This commonly occurs when the "copied from" data source is the same as the "target" data source (where the table is mapped), and often occurs for the following tables:

UDC tables	Menu tables
F0004 and F0005	F0082, F00821, F0083, and F0084

If you load multiple environments that share the same mappings (for example, *DV920* and *TS920*), the first environment loaded (*DV920* in this case) lists the tables with a Success status. The second environment (*TS920*) lists any tables already created during the first environment load with a status of No Action and a target data source warning of Existing Table.

The No Action status and Existing Table warning for the second (*TS920*) environment are normal. You can verify that any table with a target data source warning of Existing Table has been created successfully by verifying it was created while loading a previous environment.

Data Dictionary Specification Merge Report and Data Dictionary Text Merge Report (R98722C and R98722T)

Note: These reports are only for customers installing *Release 9.2* on the *IBM i* . The reports are not for upgrade or cumulative update customers.

- *PY920*
- *DV920*
- *PS920*
- *PD920*
- *DEP920*

The Control Table Workbench creates these reports:

- Data Dictionary Specification Merge report (R98722C)
- Data Dictionary Text Merge report (R98722T)

Run version ZJDE0001 for both of these reports.

The data dictionary merge reports show the results of merging modified data dictionary information into the *Release 9.2* data dictionary.

Processing Options

The processing options for both reports are the same.

The Merge Option tab contains the option to select update mode.

Errors and How to Resolve Them

Most failures on these reports result from attempting to merge data items that do not exist in the target data dictionary into *JD Edwards EnterpriseOne* . These failures are normal and can be ignored. If every item on the report lists a merge status of "failed," then the source data dictionary could not be found to perform the merge. Verify your source data dictionary and run the merge again.

Object Librarian Modifications Report (R9840D)

Note: This report is used only by upgrade and cumulative update customers.

The Object Librarian Modifications report is created when running the Installation Workbench program before you merge any objects. It shows which objects from the previous release are flagged to be merged into the new release as well as which components of that object have been changed or added.

This report does not have processing options.

If you have made custom modifications to your business data, you can use the Customization Object Analyzer to identify customizations in order to determine the impact and level of effort to retro-fit the customizations into the newer release of JD Edwards EnterpriseOne. The Customization Object Analyzer is a summary and detail report that reads the custom modifications that have been made to your system. The reports are:

- Object Customization Summary Report
- Object Customization Detail Report

See Also

The section entitled *Customization Object Analyzer* in the *JD Edwards EnterpriseOne Tools Software Updates Guide* .

Async Launch (R98405A)

Table conversion workbench launches the R98405A program for every conversion when running them asynchronously, regardless of whether they will be run on the Deployment Server or Enterprise Server. The R98405A program launches the conversion. When all conversions complete, you can review their status by running the R984052 report, which is described in *Report on Table Conversions (R984052)*.

Report on Table Conversions (R984052)

Report on Table Conversions is created by Table Conversion Workbench when conversions are run asynchronously. The report shows the results for each table conversion and merge. Review this report to verify that each table conversion or merge completed normally.

How to Read the Report

The following column headings appear in this report:

Object headings	Description
Environment	The new environment being converted or merged to.

Object headings	Description
Previous Environment	The environment being converted or merged from.
Obj Name	Object Name. The name of the table being converted or merged.
Program Name	The identification number of the table conversion or merge program.
Version	The version of the table conversion or merge.
Status	The status of the table creation. A successful completion is indicated by Completed Normally.

Object Specification Merge Report (R98700)

Note: This report is used only by upgrade and cumulative update customers.

The Object Specification Merge report is closely related to the Object Librarian Modification report. This report is created during the Specification Table Merge Workbench. It shows the results of the merge for each modification and summarizes the activity shown on each Specification Merge Multithread Driver Report (R987001). Review this report to verify that all modifications were successfully merged.

Processing Options

This report has processing options for each of the following versions:

Version number	Version Title
ZJDE0001	UPGRADE – normal processing
ZJDE0002	UPDATE – normal processing
ZJDE0003	UPGRADE – restart
ZJDE0004	UPDATE – restart
ZJDE0005	UPGRADE – reprint
ZJDE0006	UPDATE – reprint
ZJDE0007	Internet Code Change Merge

Version number	Version Title

How to Read the Report

This report is designed to help you review the objects that will be merged. If the report shows any objects that you do not want to be merged, you can change the modification flag and the merge option so that the modification will not be merged into the new release. Similarly, you can verify that all modifications you want to be merged into the new release are flagged appropriately.

Two sets of headings appear on this report: one for the modified object, and a subheading for the modified components of that object.

Object headings	Description
Obj Type	Type of object. For example, APPL for application or BSFN for business function.
Object Name	Alphanumeric identifier for the object.
Member Description	Brief description of the object.
Syst Code	Product code the object belongs to.
Location	The machine the object is on, which is typically the Deployment Server.
Path Code	Path code in the previous release that the object belongs to.
Mod Flag	Whether the object has been changed (C).
Mrg Opt	Whether the object will be merged (1 is yes, 0 is no).
Date Modified	Last date the object was changed.

Component headings	Description
Object Component	Part of the object that was changed or added (for example, forms and event rules).
Status	Successfully read components will have a status of changed or added. If the status is "failed," the batch application could not read the modified component.
Description	Brief description of the change. If the status is "failed," the description will be a brief explanation of the error. These errors usually result from a failure to read the file.

Component headings	Description

The report includes the status of the following record types:

- Package names
- Source environments
- Target environments
- Advanced options

The report is broken into four sections:

- The first section is a cover page which summarizes the processing options used to generate the report.
- The second section is a list of the completion statuses of these objects as described in this table:

Object	Status	Description
Object Librarian	Success	Indicates the number of objects successfully added or updated.
	System 88 Warning	Indicates the system detected custom modifications for an object in a *JD Edwards EnterpriseOne* product code that does not exist in the new Object Librarian. Object Librarian objects were obsoleted by *JD Edwards EnterpriseOne* , so you, as the customer, need to decide how this affects your procedures.
	Errors: Setup issues	Indicates setup issues. To verify that your setup is correct you should: o Verify access authority to the source and target Object Librarian. o Check the JDE.LOG for insert or delete errors on the F986* tables.
Versions List	Success	Indicates the number of copies successfully added or updated. Specification Merge totals indicate the number of added, replaced, and merged objects.
	PO Change Warning	Indicates the processing options format for a ZJDE version has changed. Review and update options on these versions.
	Errors	Indicates the number of errors that occurred during the merge. Check the JDE.LOG for more complete messages dealing with F983051 or F98306.
Central Objects	No Action Taken	This category is applicable for ZJDE versions. It shows that the version data was transferred but that no specification merges occurred.

Object	Status	Description
	Warnings and Errors	Indicates that details for warnings and errors occured. You can locate these in the detailed fourth section of the report.
	Not Processed	Indicates that the merge did not finish. Evaluate the errors and rerun the merge using a Restart version number.
	In Process	Indicates a fatal error occurred in the merge business function before completing the object. Evaluate and fix the error conditions before restarting the merge.

- The third section summarizes the merge statuses of each object in one line per object with these column headings:

Object headings	Description
Obj Type	Object type, such as BSFN is a business function and TBLE is a table.
Object Name	Alphanumeric identifier for the object.
Version	The report version number run for this object.
Syst Code	Product code.
Merge Action	Indicates the object on source was added, replaced, or merged on the target.
Object Librarian Merge	Completion status for Object Librarian updates for this object.
Versions List Merge	Completion status for Versions List updates for this object.
Merge Status	Completion status for Specification merge for this object.
Date Completed	Date the object was merged.
Time Updated	Time the object was updated.

- The fourth section contains detail information for each merged object and includes these common errors:

- Insert errors.
- Header and source files that fail to copy.
- Invalid dictionary items for tables or views.
- Invalid files name or column in business views.

This table explains the column headings in the section:

Object headings	Description
Object Name	Alphanumeric identifier for the object.
Version	The report version number run for this object. "+" indicates a template for a report.
Obj Type	Object type. For example, BSFN is a business function and TBLE is a table.
Syst Code	Product code.
Merge Action	Indicates the object on target source was added, replaced, or merged.
Merge Status	Success means that the object and all modified components were merged successfully. Warning means that one or more components did not merge correctly.
Mod Flag	Modification flag.
Date Completed	Last date the object was modified.
Time Updated	Last time the object was updated.

This table describes the column subheadings:

Object headings	Description
Description	Type of object component, such as a template, a field or an event rule.
Status	Status of the merge for that particular component. Success is denoted by a status of Added or Changed. Unsuccessful merges are noted with Failed or Error.
Description	This can be a brief description of the component or, in the case of a failure, an error message describing the failure. Disable and Append indicates event rules which require developer fixes.

Errors and How to Resolve Them

If an error occurs which stops the merge process there are two ways to recover, RESTART or RERUN. If the process stops during the Object Librarian merge or the Versions List merge, no recovery of specifications is necessary. Just rerun the merge after fixing the problem that initially caused the error. If the Merge Status column indicates that some items have merged or started merging, you must do a RESTART.

A RESTART merges items which are at a merge status of "Not Processed". All other statuses are skipped. Whether original specifications must be restored for objects with a status of "Error," "Warning," or "In Process," the status must be evaluated based on the merge action type.

Merge ActionRestore Target Specifications	Merge Status
ADDNO	Any
REPLACENO	Any
CHANGENO	NOT PROCESSED
CHANGENO	SUCCESS
CHANGEYES	ERROR
CHANGEYES	IN PROCESS
CHANGEYES	WARNING

To restore specifications for a single object, use Object Transfer to copy the object from the new pristine environment to the target environment.

Modifying the Merge Status of an Object

This release contains a new application (P98700) for an interactive view of the progress during merges. F988810 is a new table used to control and track the merge process. Each record is time stamped as processing occurs. Before a RESTART operation it is possible to change the merge status to Not Processed, following the rules above, to repeat a merge for a specific object.

See Also

Restarting the Specification Merge

Release 9.2 on a Cluster section in the *JD Edwards EnterpriseOne Tools Server and Workstation Administration Guide* .

The summary report shows the status of the completed Object Librarian, Versions List, and Specifications Merges.

Compare Tables and Indexes Against Central Objects or TAM Specifications (R9698711)

You can run the R9698711 program from Batch Versions after an install or upgrade. The report compares database tables and indexes against *Release 9.2* Central Objects or TAM specifications. Use this report to verify the format of *Release 9.2* tables in your database.

UDC Merge Report, Data Dictionary Merge Report, and Menu Merge Report

Note: These reports are used only by upgrade and cumulative update customers.

The UDC Merge, Data Dictionary Merge, and Menu Merge programs produce these reports:

- UDC Merge and Exception report (R987241)
- Data Dictionary Merge and Exception report (R989200)
- Menu Merge report (R989751B)

These three merge reports are created when you run Control Table Workbench during *Running Installation Workbench* in the *JD Edwards EnterpriseOne* Upgrade Guide. These reports show the status of the UDCs, data dictionary items, and menus that were merged.

Setting Processing Options

The processing options are the same for all of these merge reports.

UDC Merge and Exception Report and Data Dictionary Merge and Exception Report

The Release Info tab contains these options:

Option	Value
Update Mode	Enter **2**. Default is Update Mode.
Environment Name for the Old Release	Enter a valid environment name. For example, PRODB7334.
Old Release Name	Enter the name of the old release. For example, B7334.
New Release Name	Enter the name of the new release. For example, *E920* .
Merge Language Codes	Enter *N* if language codes do not need to be merged.

Menu Merge and Exception Report

The Merge tab contains these options:

Option	Value
Update Mode	Enter *2*. The default is update mode.
Environment Name for the Old Release	Enter the name of the old release environment. For example, PRODB7334.
Old Release Name	Enter the name of the old release. For example, *E920* .
New Release Name	Enter the name of the new release. For example, *E920* .

How to Read the Report

Each report has a cover page that contains a summary of and basic information about your upgrade, release information, source mappings, mappings from replication, additional table mappings, and the mode in which the report was run.

The main text of the report indicates the status of Environment and Release Information, Source UDC Table Mappings, UDC Table Mappings from Replication, Additional Table Mappings, and Mode.

If the entire merge is successful, a message appears at the end of each report:

- For the UDC Merge and Exception report: "UDC Merge process completed successfully with no errors and warnings."
- For the Data Dictionary Merge report: "Data dictionary merge process completed successfully with no errors and warnings."
- For the Menu Merge report: "Menu merge process completed successfully with no errors and warnings."

Note: If you have made custom modifications to your business data, you can use the Application Configuration Analyzer to verify that your changes were carried forward to the new release. The Application Configuration Analyzer is a set of reports which identify differences for processing options, data dictionary (DD) items, and user defined codes (UDCs) between releases or environments. These reports are:

- Versions Compare
- User Defined Codes Compare
- Data Dictionary Compare

See Also

- The section entitled: *Application Configuration Analyzer* in the *JD Edwards EnterpriseOne Tools Software Updates Guide*.

Errors and How to Resolve Them

If warnings appear in the report, the merge finished. Check the warning log printed at the end of the report to diagnose any problems that may have occurred.

Errors appear only when the problem is severe enough to stop processing. If the report contains error messages, the merge process was not completed. Information regarding any errors is also printed in the log at the end of the report.

This following error message appears if change tables do not have records associated with the From Release and To Release settings: "DD Merge process terminated: Check Error Log."

Index Recreation (R9698713)

The R9698713 program is run from Batch Versions after an install or upgrade. It compares database indexes versus *Release 9.2* index specifications in F98712 and F98713. If you run the program in Update mode, it recreates incorrect indexes.

Pathcode Copy (R9800942)

Environment Workbench runs the R9800942 program for each custom environment whose path code is to be copied from an existing path code. It copies the directory structure of the existing path code on the Deployment Server. It also copies `package.inf` and records in the package definition tables F9603, F9631, F96021 and F96215, replacing the path code names in those items.

25 Uninstalling the Software

Uninstalling the Software

Note: Regarding the removal of software, Oracle products use the terms "deinstall", "deinstalling", and "deinstallation", which are functionally synonymous with other products who use the terms "uninstall", "uninstalling", and "uninstallation". This document uses "deinstall " and "uninstall" interchangeably. They both mean removing a product from your machine.

Understanding the Uninstallation

The installation and upgrade processes do not automatically remove any *JD Edwards EnterpriseOne* databases. You should have a database administrator (DBA) for your relational database management system (RDMS) manually remove any unused databases according to the list of databases and associated components, which are provided in this document.

The uninstallation program restricts you from uninstalling a mandatory component without also removing all associated optional components that were previously installed. The relationship between the mandatory and optional components is shown in this table:

Server	Mandatory Component	Optional Components
Deployment Server	*JD Edwards EnterpriseOne* Files	Production Environment Prototype Environment Development Environment Pristine Environment
Enterprise Server	*JD Edwards EnterpriseOne* Foundation	ES Production ES Prototype ES Development ES Pristine

Uninstalling the Software from the Development Clients

You can remove previous *JD Edwards EnterpriseOne* installations from Development Clients by running the uninstallation program as described in the *JD Edwards EnterpriseOne Development Client Installation Guide* . This guide also includes optional manual cleanup instructions in case the uninstall was not fully successful.

Uninstalling the Local OEE from the Deployment Server

To uninstall the local Oracle database:

1. Either export the local database tablespaces or uninstall JD Edwards EnterpriseOne using Start > Programs > Oracle - <Home_Name> > Oracle Installation Products > Universal Installer where <Home_Name> is the name that you gave the installation of EnterpriseOne on the Deployment Server.
2. Locate this file:

   `<Oracle_Home>\deinstall\deinstall.bat`
3. Right click on the file that you located in Step 2 and select **Run as administrator**, where `<Oracle_Home>` is the directory where you installed the local Oracle database. For example, your directory might be:

   `c:\Oracle\E1Local`
4. At the end of the uninstallation, verify that these Oracle_Home directories have been deleted:

   `c:\Oracle\E1Local`

   `c:\Oracle\oradata`\E1Local

   If these directories still exist, you should attempt to manually delete them.

   > **CAUTION:** Prior to any reinstall an Oracle local database on this same machine, the Oracle_Home directory (for example, `c:\Oracle\E1local` or `c:\Oracle\oradata`) must not exist. If you attempt to reinstall the local Oracle database and this directory still exists, it is likely that the new installation will fail.

   > **Tip:** You may not be able to delete the Oracle_Home directory (for example, `c:\Oracle\E1local` or `c:\Oracle\oradata`) if a process has it locked. In that case, to determine which process(es) has it locked, run the steps in the section of this guide entitled: *Process Explorer*.

Manual Cleanup of a Uninstalled Oracle Database on the Deployment Server

If the uninstallation of the OEE database fails for some reason, you need to perform the manual steps in this procedure to completely remove the old installation before reinstalling the database.

1. Uninstall the Deployment Server.

Be sure the Deployment Server is uninstalled before attempting to uninstall the database. This should ensure that no EnterpriseOne tablespaces are imported (attached) to the EnterpriseOne database.

2. Delete the following registry keys:

   `\HKEY_LOCAL_MACHINE\SOFTWARE\ORACLE\KEY_E1Local`

   `\HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\ORACLE\KEY_E1Local`

   `\HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\services\`(see **Keys** below)

   Keys. Delete any keys with names that start with "Oracle" and contain "E1Local".

3. Delete these directories:

   `c:\Oracle\E1Local`

   `c:\Oracle\oradata`

   If you cannot delete the `E1Local` or `oradata` subdirectory because a file in that directory is locked, follow these steps:

   a. Determine which file is locked and which process has the lock on the file. A freeware program called Process Explorer can be helpful in determining this information. You can obtain a free copy of Process Explorer from this web site:

      http://technet.microsoft.com/en-us/sysinternals

   b. Either kill the locking process with Process Explorer or Microsoft Windows Task Manager or, if the process was started as a Microsoft Windows service, change the Startup Type to Manual and reboot the computer again.

   c. Try again to delete the `E1Local` or `oradata` subdirectory.

4. Remove the 64-bit Oracle inventory entries.

   a. With a text editor (such as Notepad), edit this file:

      `c:\Program Files\Oracle\inventory\ContentsXML\inventory.xml`

   b. Delete any lines that start with:

      `<HOME NAME="E1Local"`

   c. Save the file.

5. Remove the entry from the Windows PATH.

   a. Navigate to Control Panel > System.

   b. Click the **Advanced** button for system settings on the left.

   c. Click the **Environment Variables...** button near the bottom.

   d. In the System variables box near the bottom, highlight Path and click the **Edit...** button.

   e. In the Variable value field, delete this value:

      c:\Oracle\E1Local\bin

      Note: Be sure to remove the semicolon as well.

   f. Click the **OK** button.

6. Remove the ORACLE_HOME Windows environment variable.

   a. Navigate to Control Panel > System.

b. Click the **Advanced** button for system settings on the left.
c. Click the **Environment Variables...** button near the bottom.
d. In the System variables box near the bottom, highlight **ORACLE_HOME** and click the **Delete** button.
e. Click the **OK** button.

Using the OUI Installer to Uninstall JD Edwards EnterpriseOne from the Deployment Server

You can use the OUI installer to uninstall JD Edwards EnterpriseOne from the Deployment Server. To uninstall the local database, depending on your local database type, refer to the preceding sections of this guide entitled: *Uninstalling the Local OEE from the Deployment Server*.

To use the OUI installer to uninstall JD Edwards EnterpriseOne from the Deployment Server:

1. Log on to the Deployment Server as a user with Administrator rights.

   > **CAUTION:** Ensure that the Administrator account name that you use does not contain any special characters.

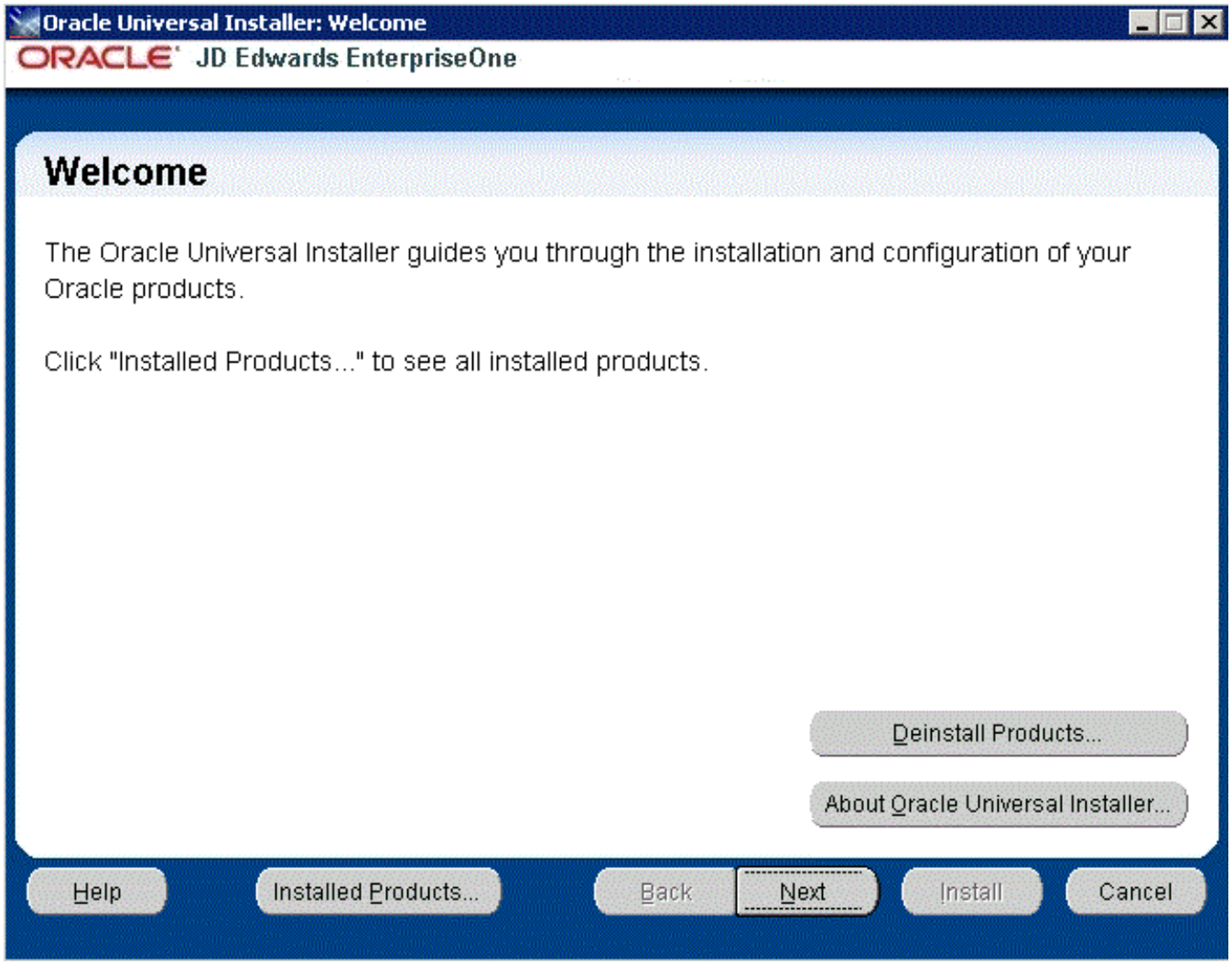
2. If JD Edwards EnterpriseOne is running on the Deployment Server, stop it.

   Use Task Manager to verify these processes are stopped:

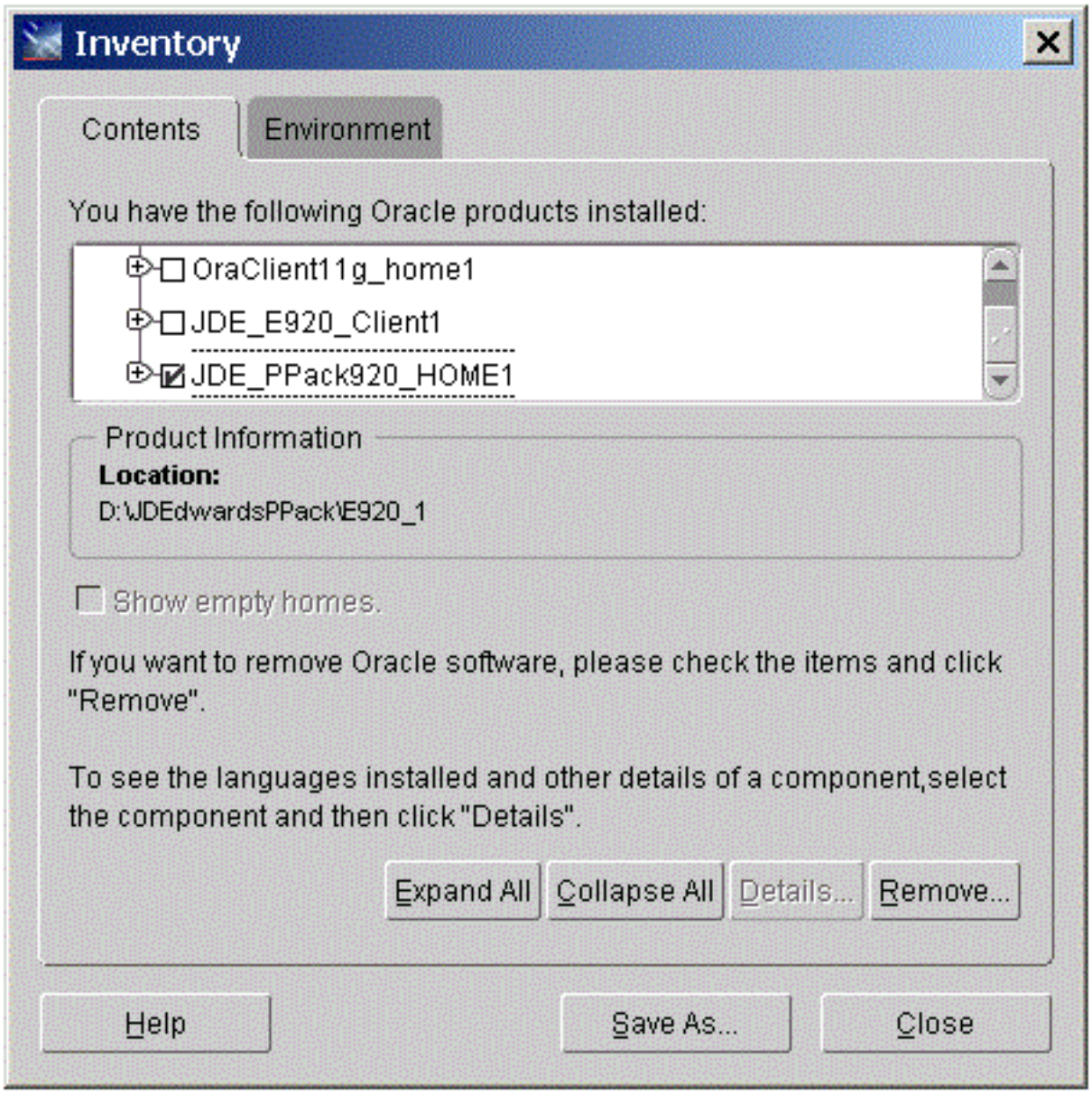
   - `activConsole.exe`
   - `jdenet_n.exe`
   - `java.exe`

   If any of these processes are running, either wait for them to finish or kill them via Task Manager.

3. Go to Start > All Programs > Oracle - JDE_DEP920_Home > Oracle Installation Products > Universal Installer.



4. On Oracle Universal Installer: Welcome, select the **Deinstall Products ...** button.

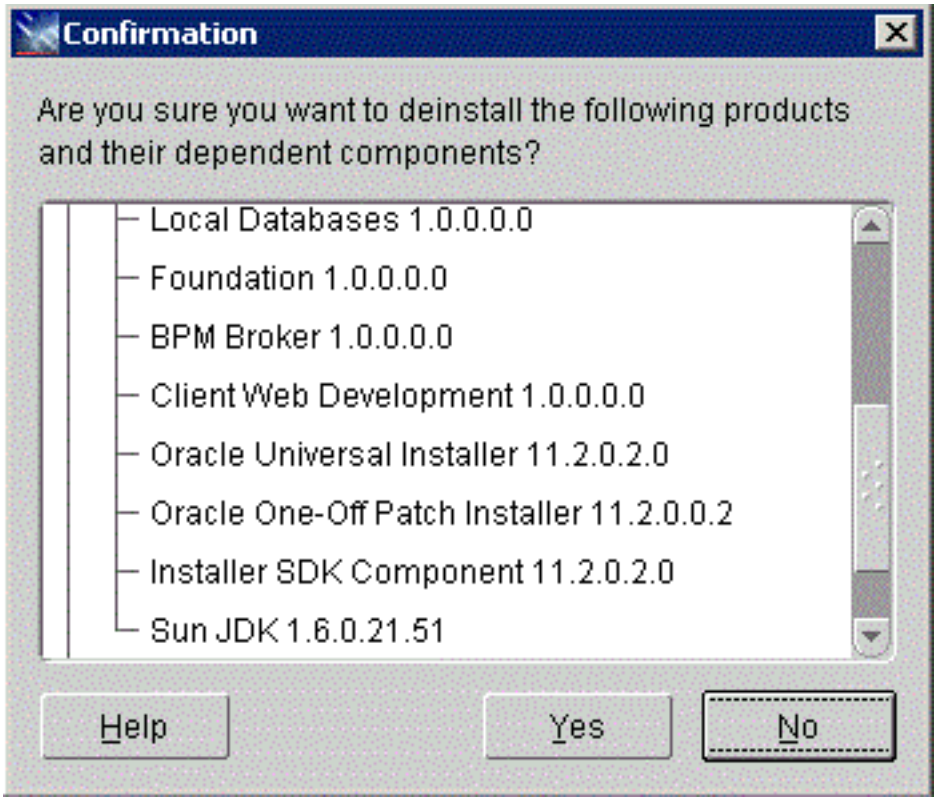


5. On Inventory, with the Contents tab select, put a check mark next to the Oracle Homes for the Deployment Server Home.

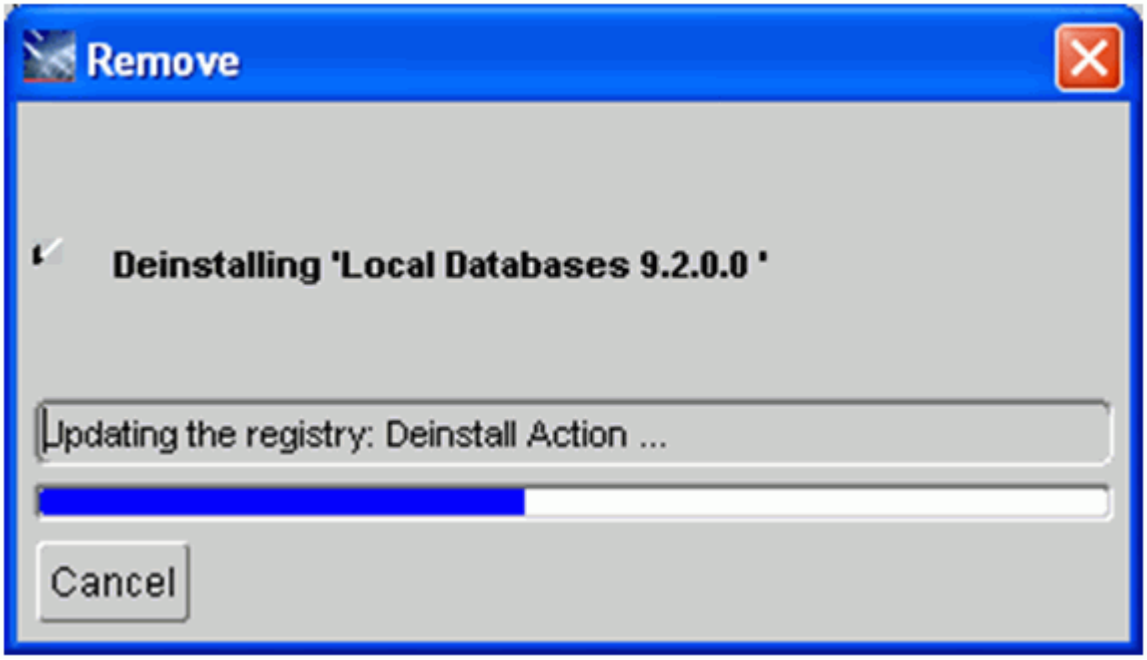
   For example, if you followed recommendation in this guide the Oracle Home for your Deployment Server is:

   JDE_DEP920_HOME

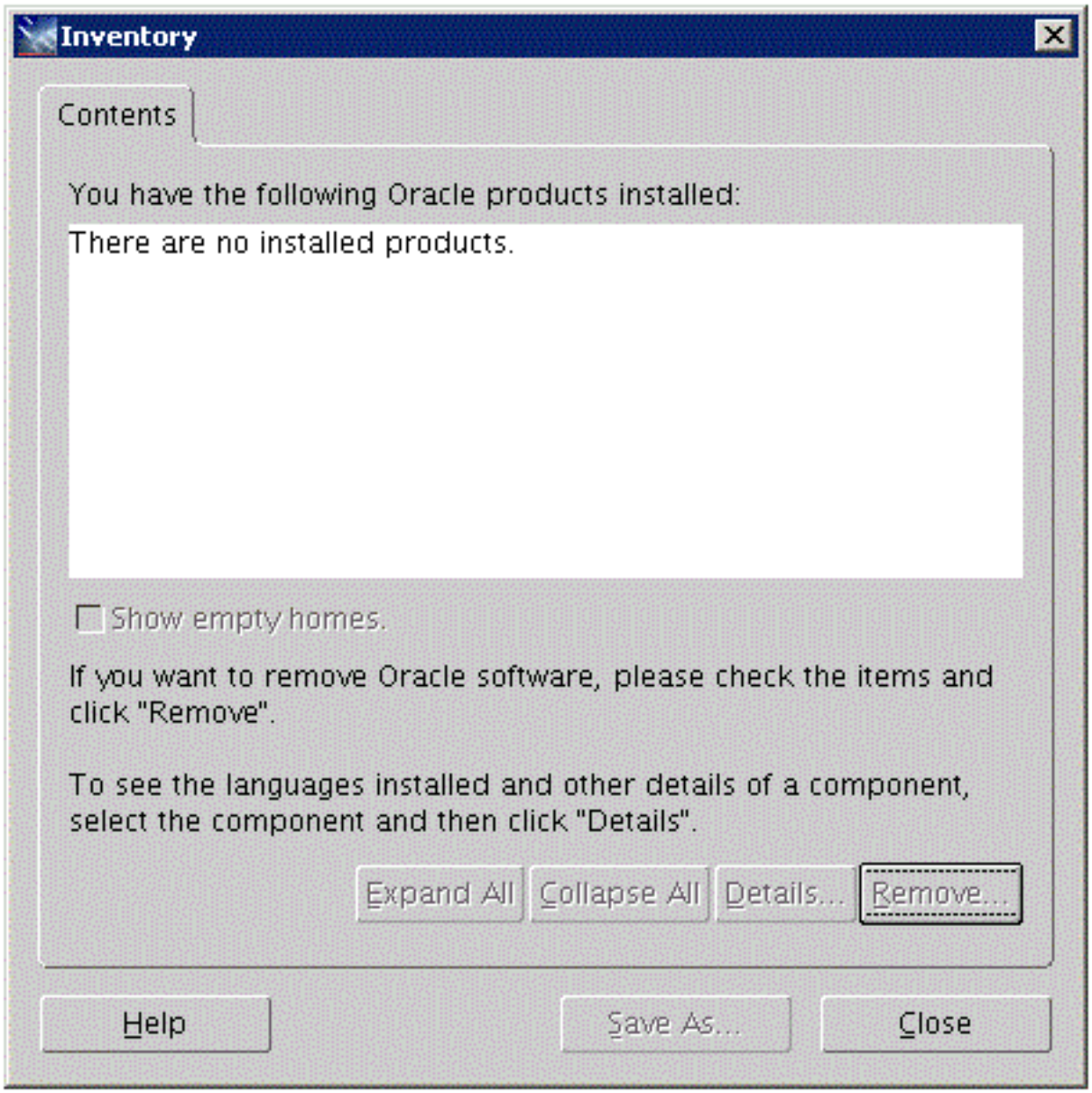
6. Select the **Remove** button.



7. On Confirmation, verify that you want to uninstall the listed components and their dependent components and if so, select the **Yes** button.

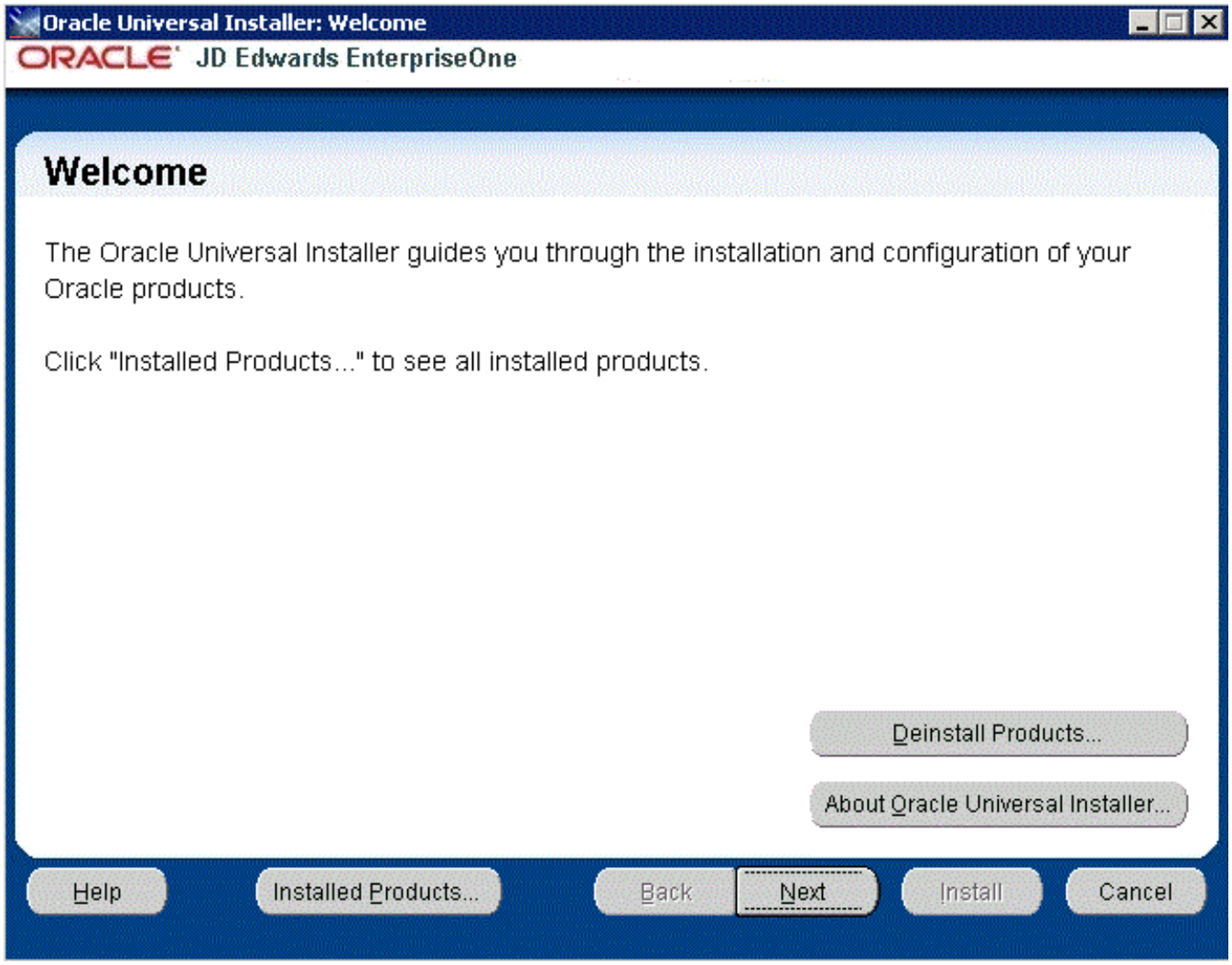


The Remove dialog indicates the progress of the uninstall action.



8. When the uninstallation process completes, the Inventory is shown again. The products you selected for uninstallation should no longer be displayed in the inventory.

9. Select the **Close** button.



You are returned to the Oracle Universal Installer: Welcome screen.

10. On Oracle Universal Installer: Welcome, select the **Cancel** button to exit the Oracle Universal Installer.

Dropping DB2 for IBM i Libraries

This section lists the *DB2 for IBM i* libraries that must be manually dropped by a DBA. This is the list of libraries that were created by the *JD Edwards EnterpriseOne 9.0* Installation of the Platform Pack on your Enterprise or Database Server for your *JD Edwards EnterpriseOne* installation, or from a previous *JD Edwards EnterpriseOne* installation.

By design, these libraries are not automatically removed by the *JD Edwards EnterpriseOne* uninstallation program. You should have a DBA for your RDBMS manually remove any unused libraries listed in the table below.

JD Edwards EnterpriseOne Component	***DB2 for IBM i* Library Name**
Foundation	*SY920* *OL920* *DD920* *SVM920* *OWJRNL*
Production	*COPD910* *PRODDTA* *PRODCTL*
Pristine	*COPS910* *PS920DTA* *PS920CTL*
Development	*CODV910* *TESTDTA* *TESTCTL*
Prototype	*COPY910* *CRPDTA* *CRPCTL*

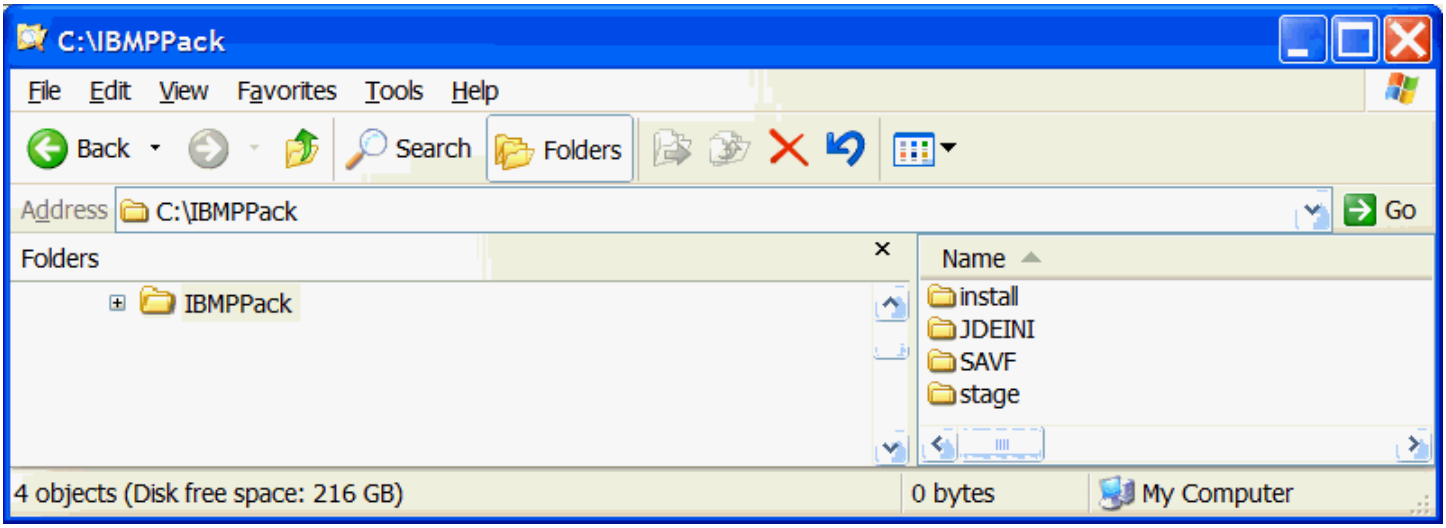
Uninstalling the Platform Pack

You should always use the *JD Edwards EnterpriseOne* OUI-based installation program to remove *JD Edwards EnterpriseOne* . If you manually remove the software, the uninstallation cannot be guaranteed to be complete and, as a result, subsequent reinstallation of *JD Edwards EnterpriseOne* may be hindered.

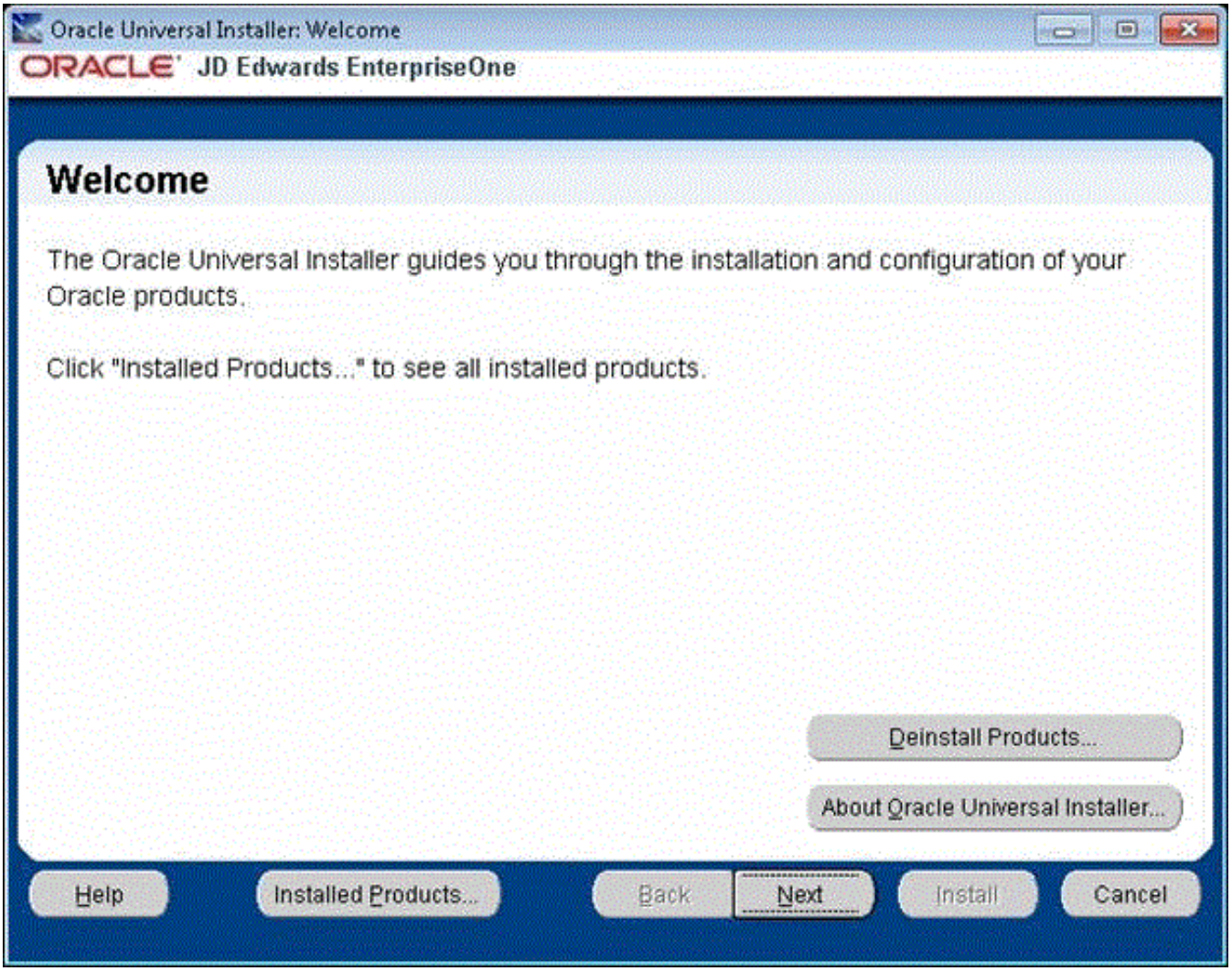
To run the JD Edwards EnterpriseOne Platform Pack Installer for the IBM i Enterprise Server:

1. Log on to the same Microsoft Windows machine where you initially ran the Platform Pack installer for IBM i. If you followed the recommendation, this will be the JD Edwards EnterpriseOne Deployment Server.
2. Locate the directory where you extracted the install images. If you followed the recommendation, the directory is:

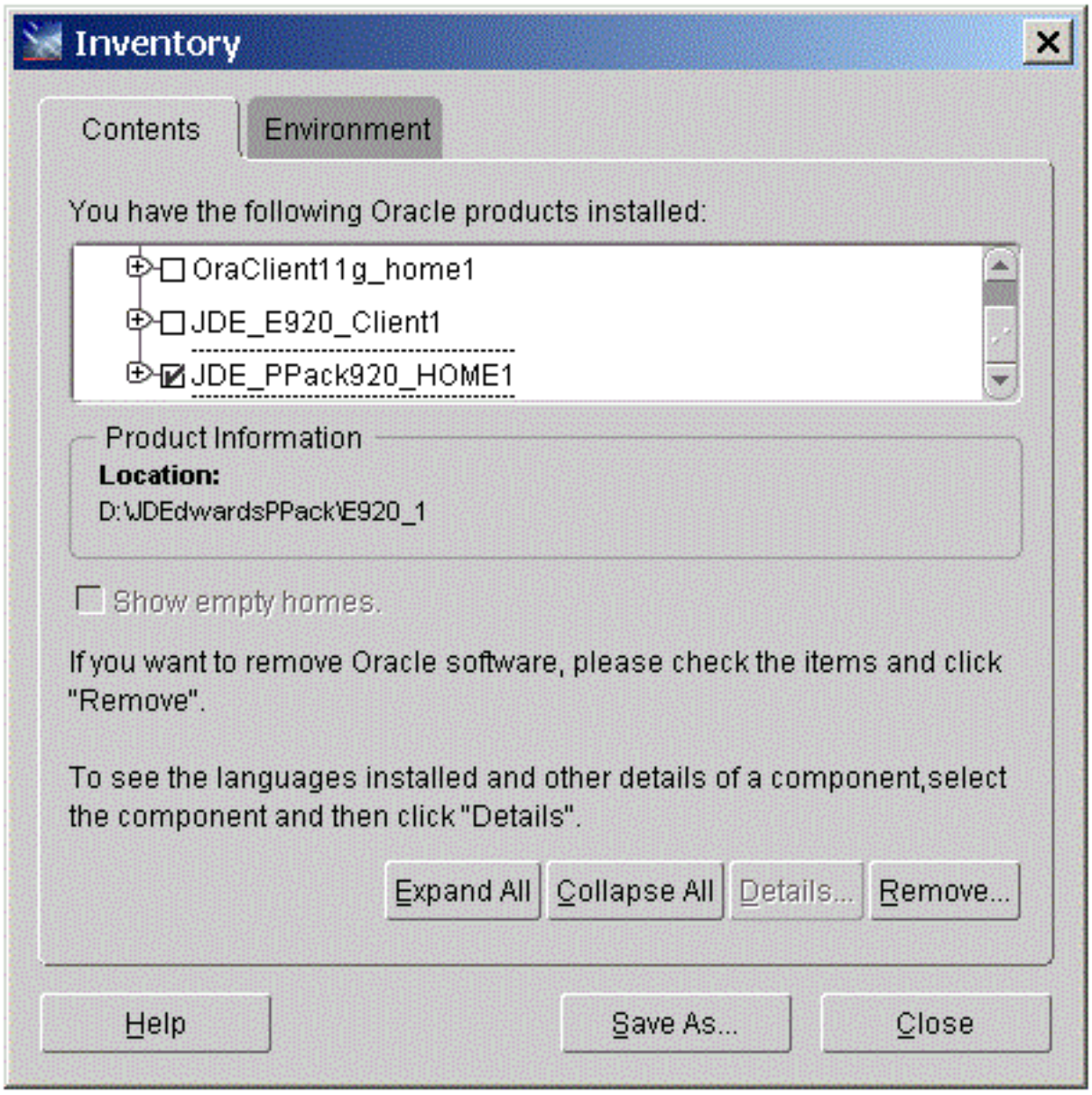
   ```
   c:\IBMPPack
   ```



3. In the extracted structure, locate the setup.exe file under the \install subdirectory, right-click on it, and select Run as Administrator.



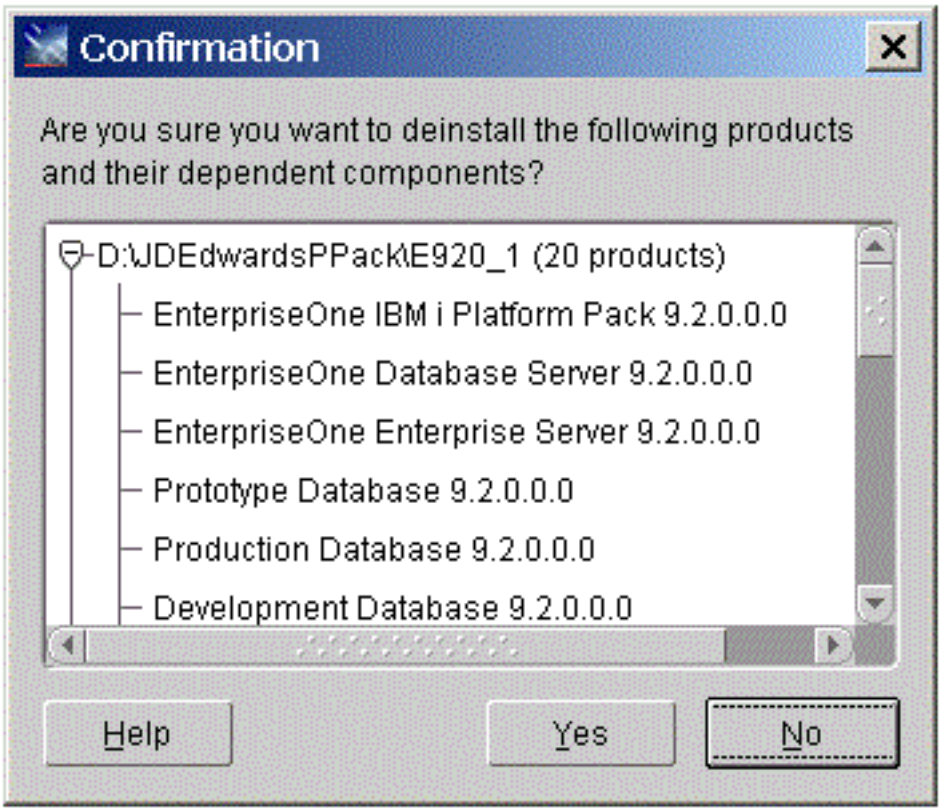
4. On Oracle Universal Installer, Welcome, click the **Deinstall Products...** button.



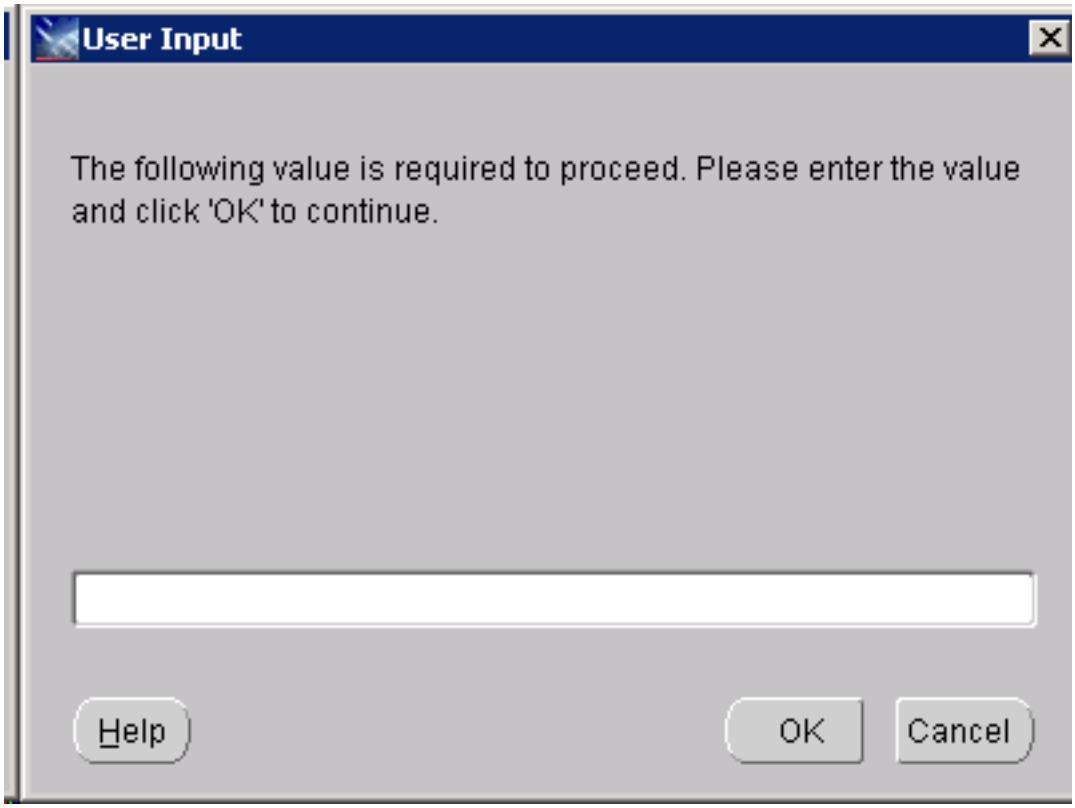
5. Turn on the check box next to the Oracle Home for the Platform Pack and expand the node to show all installed components. For example, the Oracle Home might be named **JDE_PPack920_HOME1**.

> **Note:** At this step, you should select only the Oracle Home that is associated with this particular OUI. That is, the Oracle Home name that you select on this screen should match the Oracle Home name that you selected from Start > Programs.

6. Click the **Remove...** button.

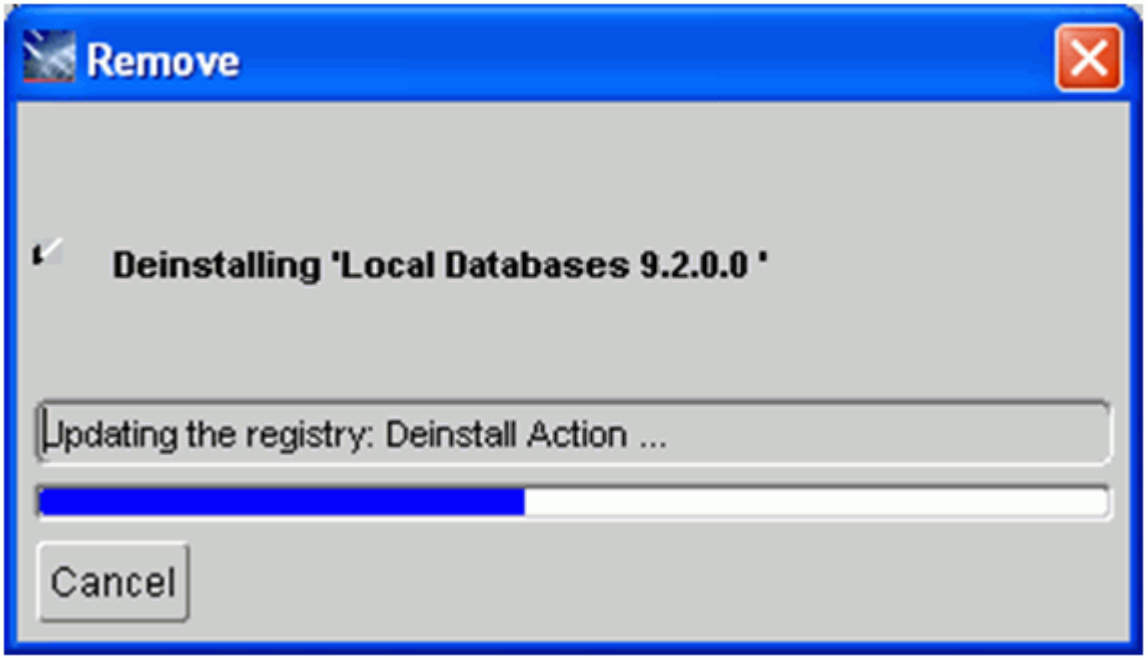


7. On Confirmation, verify that you want to uninstall the listed components and their dependent components and if so, select the **Yes** button.

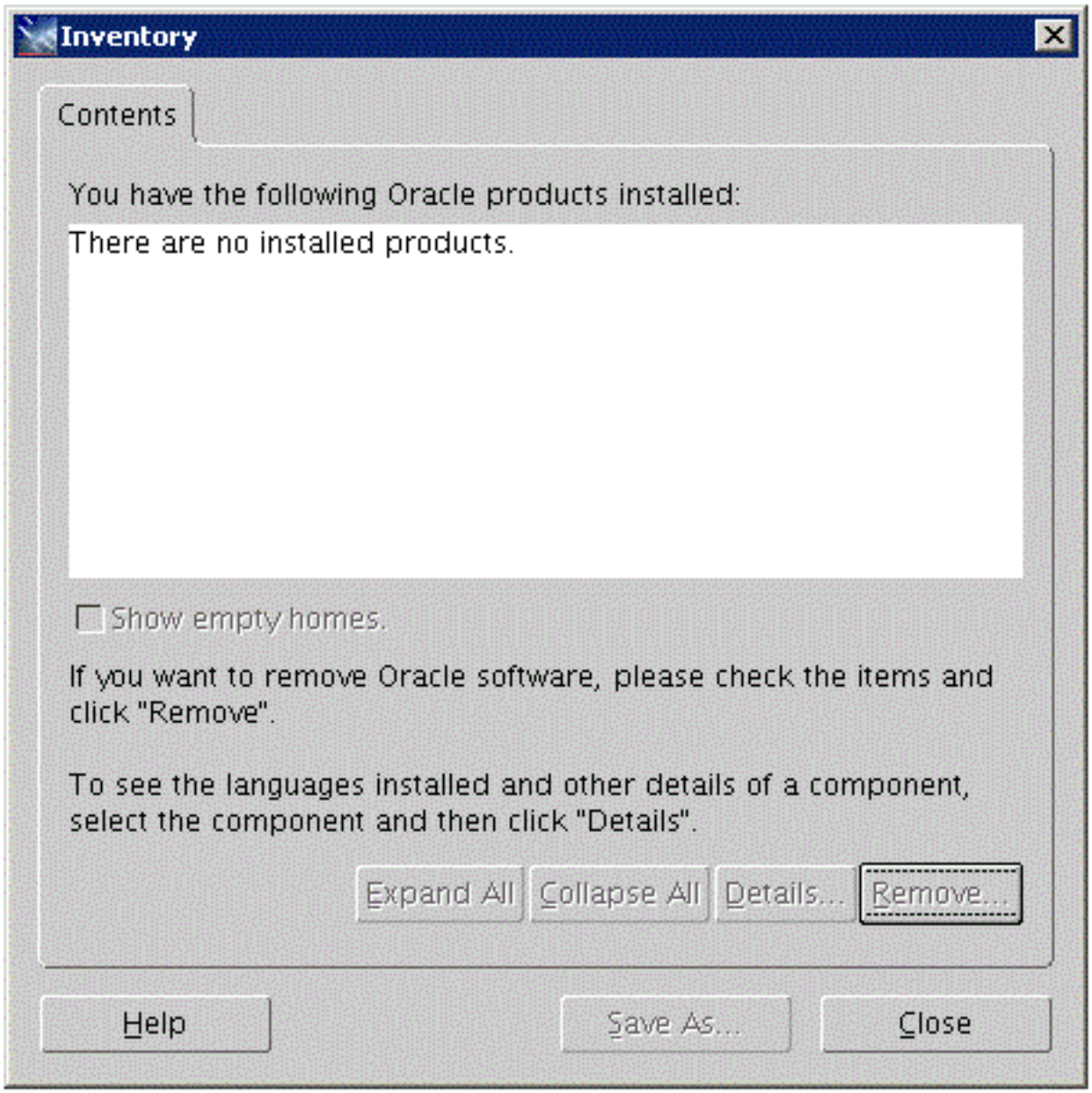


8. On User Input, you must enter the password for the account you used to run the install. For example, enter the password for QSECOFR. Then click on OK

9. Click the OK button.

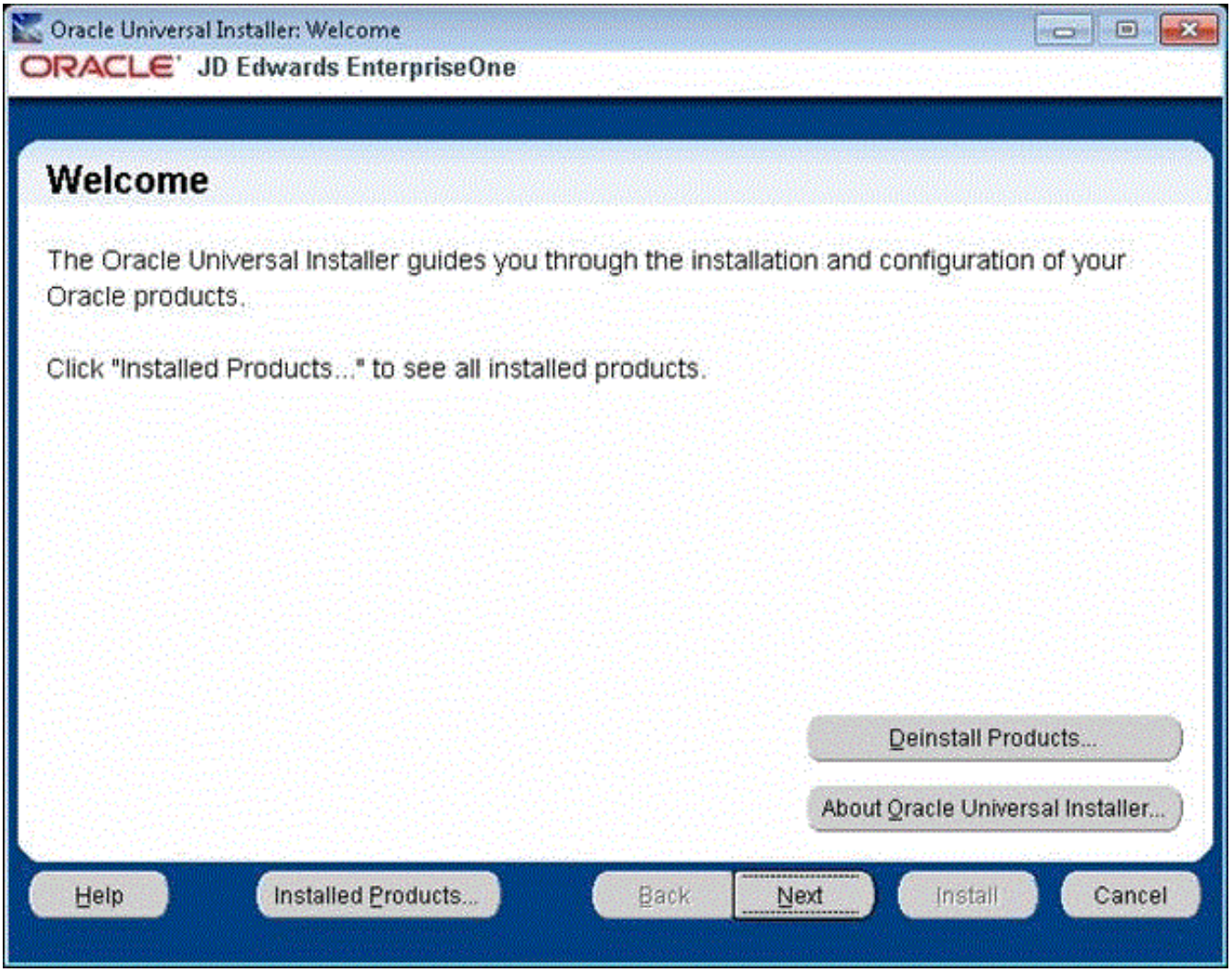


The Remove dialog indicates the progress of the uninstall action.



10. When the uninstallation process complete, the Inventory is shown again. The products you selected for uninstallation should no longer be displayed in the inventory.

11. Select the **Close** button.



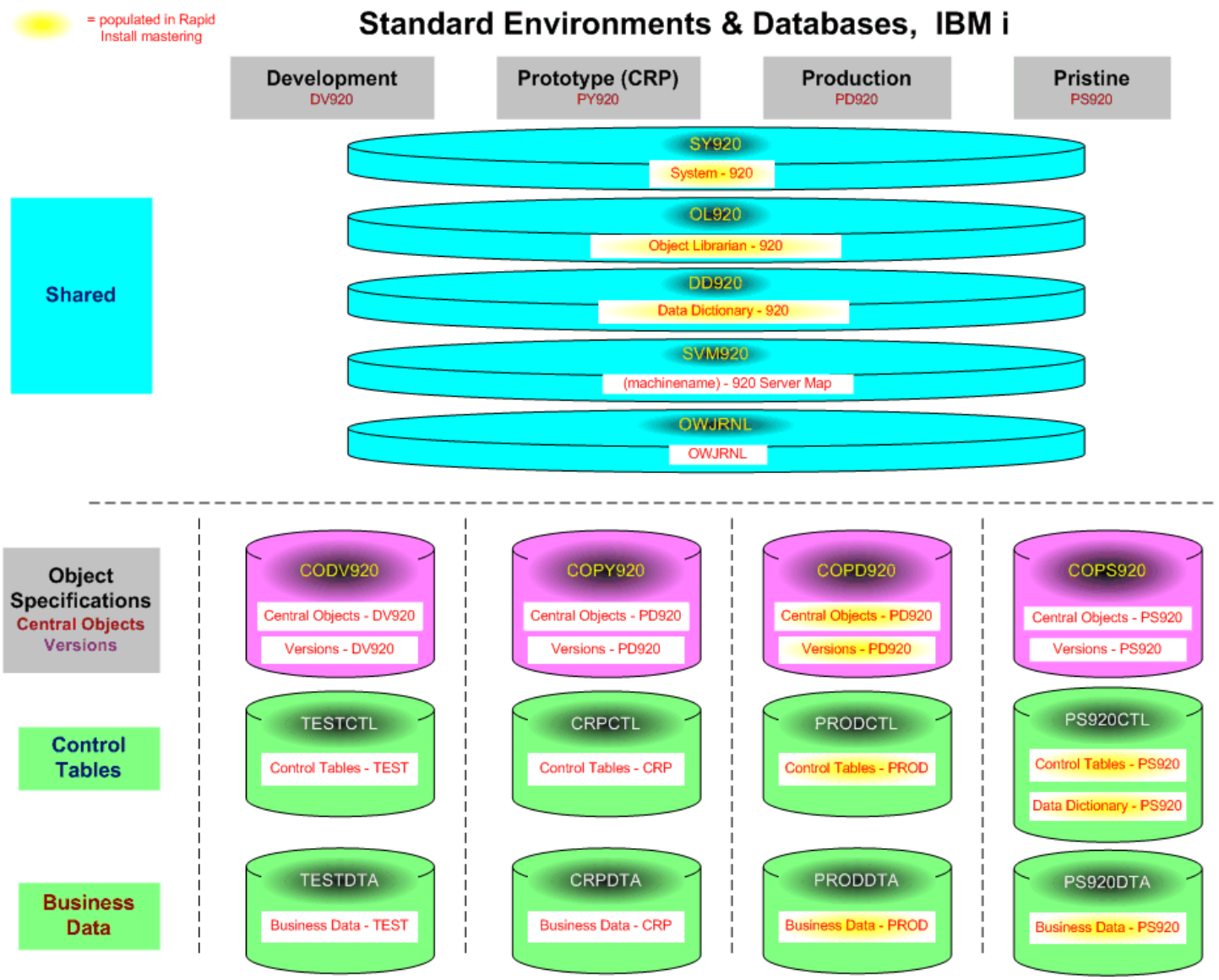
You are returned to the Oracle Universal Installer: Welcome screen.

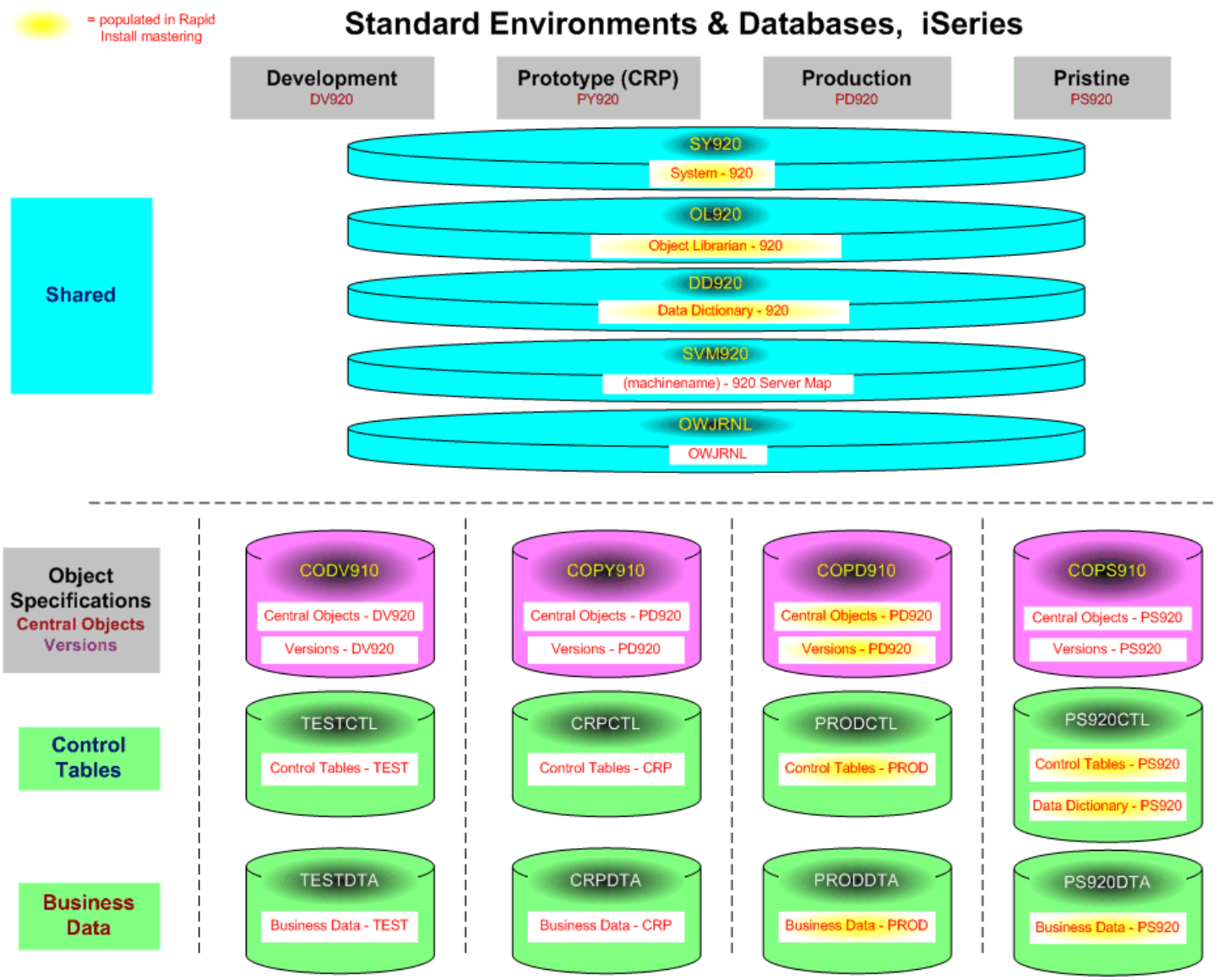
12. On Oracle Universal Installer: Welcome, select the **Cancel** button to exit the Oracle Universal Installer.
13. Verify that the installation directory (Oracle Home) has been deleted. If it still exists, you can delete it.

26 Appendix A - Understanding IBM i Databases

Understanding IBMi Databases

This appendix presents diagrams of the JD Edwards EnterpriseOne environments and their relationships with the IBM i database. The first chart shows the environments in a Traditional Upgrade while the second chart shows those in a Simplified Upgrade.


= populated in Rapid Install mastering
Standard Environments & Databases, IBM i
Development
DV920
Prototype (CRP)
PY920
Production
PD920
Pristine
PS920
Shared
SY920
System - 920
OL920
Object Librarian - 920
DD920
Data Dictionary - 920
SVM920
(machinename) - 920 Server Map
OWJRNL
OWJRNL
Object Specifications
Central Objects
Versions
CODV920
Central Objects - DV920
Versions - DV920
COPY920
Central Objects - PD920
Versions - PD920
COPD920
Central Objects - PD920
Versions - PD920
COPS920
Central Objects - PS920
Versions - PS920
Control Tables
TESTCTL
Control Tables - TEST
CRPCTL
Control Tables - CRP
PRODCTL
Control Tables - PROD
PS920CTL
Control Tables - PS920
Data Dictionary - PS920
Business Data
TESTDTA
Business Data - TEST
CRPDTA
Business Data - CRP
PRODDTA
Business Data - PROD
PS920DTA
Business Data - PS920


= populated in Rapid Install mastering
Standard Environments & Databases, iSeries
Development
DV920
Prototype (CRP)
PY920
Production
PD920
Pristine
PS920
Shared
SY920
System - 920
OL920
Object Librarian - 920
DD920
Data Dictionary - 920
SVM920
(machinename) - 920 Server Map
OWJRNL
OWJRNL
Object Specifications
Central Objects
Versions
CODV910
Central Objects - DV920
Versions - DV920
COPY910
Central Objects - PD920
Versions - PD920
COPD910
Central Objects - PD920
Versions - PD920
COPS910
Central Objects - PS920
Versions - PS920
Control Tables
TESTCTL
Control Tables - TEST
CRPCTL
Control Tables - CRP
PRODCTL
Control Tables - PROD
PS920CTL
Control Tables - PS920
Data Dictionary - PS920
Business Data
TESTDTA
Business Data - TEST
CRPDTA
Business Data - CRP
PRODDTA
Business Data - PROD
PS920DTA
Business Data - PS920

27 Appendix C - Troubleshooting the Deployment Server Installation

Verify Local Planner Tablespaces are Not Attached

If you are re-installing your Deployment Server, you must ensure that the local Planner tablespaces (Oracle) are not attached. To detach the tablespaces, run these batch files:

```
jdedwards\e920\planner\data\detach_planner.bat
```

```
jdedwards\e920\planner\data\detach_metadata.bat
```

Oracle Database Installer Logs

This section lists the log files for installations on the Deployment Server:

- `x:\jdedebug.log`

  > **Note:** The location is defined by this `JDE.INI` setting:
  >
  > ```
  > [DEBUG]
  > DebugFile=d:\jdedebug.log
  > ```

- `x:\jde.log`

  > **Note:** The location is defined by this `JDE.INI` setting:
  >
  > ```
  > [DEBUG]
  > JobFile=D:\jde.log
  > ```

- `C:\ReconfigureDB.log`
- `\InstallLogs\attach_plannerdata.log`
- `\InstallLogs\attach_plannerspec.log`
- `\InstallLogs\Configurexxxspec.log`

  Where `xxx` denotes that there are several of these logs, which contain logging for predefined package specs. For example:

  ```
  ConfigureDV920FAspec.log
  ```

- `X:\JDEdwards\E920\Detach` *XXX* `.log`

  Where `xxx` denotes that there are several of these logs, which contain logging for predefined package specs. For example:

DetachDV920FAspec.log

See Also

For OEE-specific logs, refer to *OEE Logs* in this chapter.

Configuration Files

> **Note:** This section is provided for reference. You are not required to manually configure these files because the Deployment Server installer configures the .ini files appropriately for the Oracle local database.

The data source definitions for OEE are defined in these configuration files:

- **JDE.INI**
- **JDBJ.INI**

The following lists some of the settings within the various configuration files that are related to the local database.

- **JDE.INI**

  ```
  [DB SYSTEM SETTINGS]
  Type=E
  LOBFlag=Y

  [DB SYSTEM SETTINGS  ' SECONDARY]
  Type=E
  LOBFlag=Y
  ```

- **JDBJ.INI**

  The **JDBJ.INI** file specifies location of the **tnsnames.ora** file.

  The **JDBJ.INI** file also specifies the JDBC driver for Oracle as **ojdbc7.jar**, which replaces the version (**classes12.jar**) used in prior releases of *JD Edwards EnterpriseOne* .

  ```
  [JDBj-BOOTSTRAP DATA SOURCE]
  databaseType=E
  lob=true

  [JDBj-SPEC DATA SOURCE]
  databaseType=E
  lob=true

  [JDBj-JDBC DRIVERS]
  ```

```
ORACLE=oracle.jdbc.driver.OracleDriver
```

> **CAUTION:** The shipped `jdbj.ini` file in the following folder contains specifications for each database type: **`C:\JDEdwards\E920\system\JAS\webclient.ear\webclient.war\WEB-INF\classes`** You must manually comment out (with a semicolon) every database driver that you are not using. For example, if you are connecting to only Oracle databases, your file would look like this:
>
> ```
> [JDBj-JDBC DRIVERS]
> ORACLE=oracle.jdbc.driver.OracleDriver
> ;AS400=com.ibm.as400.access.AS400JDBCDriver
> ;SQLSERVER=com.microsoft.sqlserver.jdbc.SQLServerDriver
> ;UDB=COM.ibm.db2.jdbc.app.DB2Driver
> ```

Path Code Master (F00942)

The Path Code Master (F00942) contains changes to support OEE. It contains values for use of EMDBSY column to indicate type of specs and type of local database. These values are used by JDB, JDBj, and Package Build.

EMDBSY Value	Spec Type	Local DB Type
0	TAM	MSDE
1	XML	MSDE
2	TAM	SSE
3	XML	SSE
5	XML	Oracle

Oracle Enterprise Edition

This section discusses these topics:

- *File Locations*
- *Rebooting the Deployment Server*
- *EnterpriseOne Access to the Local Oracle Database*
- *Process Explorer*
- *Verifying the Local Oracle Database Installation*
- *Deployment Server Installation Problems*
- *Runtime Problems*

- *Administering the Local Oracle Database Using SQL Plus*
- *Understanding the ReconfigureDB.exe Program*
- *Encrypting and Decrypting the Password of the Local Database*
- *Import and Export Tablespaces to the Local Oracle Database*
- *Updating the InstallManager.htm File*
- *Deployment.inf and <Package_name>.inf*

File Locations

This section discusses the location for these critical files:

- *Oracle Installation Directory*
- *OEE Logs*
- *tnsnames.ora*

Oracle Installation Directory

Deployment Server. The default installation location of the local Oracle database on the Deployment Server is:

```
C:\Oracle\E1Local
```

> **Note:** This location can be changed at installation time.

Client. The default installation location of the local Oracle database on the Web Development Client is:

```
C:\Oracle\E1Local
```

> **Note:** This location can be changed at installation time.

OEE Logs

The following table lists the locations of the various log files.

Log File	Location
Import for Planner databases	`<E1_install_dir>\planner\Data\Imp*.log`
Import for Planner specs	`<E1_install_dir>\planner\spec\Imp*.log`
Oracle import log for package specifications (created during Install and also during Package Workbench)	`<E1_install_dir>\<pathcode>\package\<pkg_name>\Spec\imp*.log and Imp*.log`
Oracle export log for specifications (created during Install and also during Package Workbench)	`<E1_install_dir>\<pathcode>\package\<pkg_name>\Spec\exp*.log and Exp*.log`
Local Oracle database runtime	`C:\Oracle\diag\rdbms\e1local\e1local\alert\`

Log File	Location
Local Oracle database listener	**C:\Oracle\diag\tnslsnr\<this_machine>\listener\alert**
Log for **ReconfigureDB.exe**	**C:\ReconfigureDB.log**
Local Oracle database install logs	**c:\Program Files\Oracle\Inventory\logs**
Log for **OEE12Setup.exe**	**c:\OEEInstall.log**

tnsnames.ora

The **tnsnames.ora** file is located in these directories:

..\Oracle\E1Local\NETWORK\ADMIN
..\JDEdwards\E920\system\classes\webclient.ear\webclient\WEB-INF\classes

Rebooting the Deployment Server

You must reboot the Deployment Server after installing or deinstalling the local Oracle database.

EnterpriseOne Access to the Local Oracle Database

The Deployment Server Installation Workbench generates and encrypts a password and then changes the local Oracle database "system" and "sys" accounts' passwords to that password. During the rest of the Installation Workbench and at runtime of the Deployment Server, the local Oracle database is accessed via the "system" account and this generated and encrypted password.

This table lists the relationship between the local Oracle database accounts and the password.

Local Oracle Database Account	Default Password
System	Generated and encrypted by the Deployment Server installer.
Sys	Generated and encrypted by the Deployment Server installer.
JDE	JDE **Note:** The default password may be changed by DBA but if Security Server is not used, it must match the password of EnterpriseOne user JDE.
<tablespace_name>	<tablespace_name>

Local Oracle Database Account	Default Password
For example: • JDESY920 • JDEOL920	For example: • JDESY920 • JDEOL920 **Note:** The default password may be changed by DBA. This value does not affect the runtime operation of *JD Edwards EnterpriseOne* because it does not access the local Oracle database in this manner.

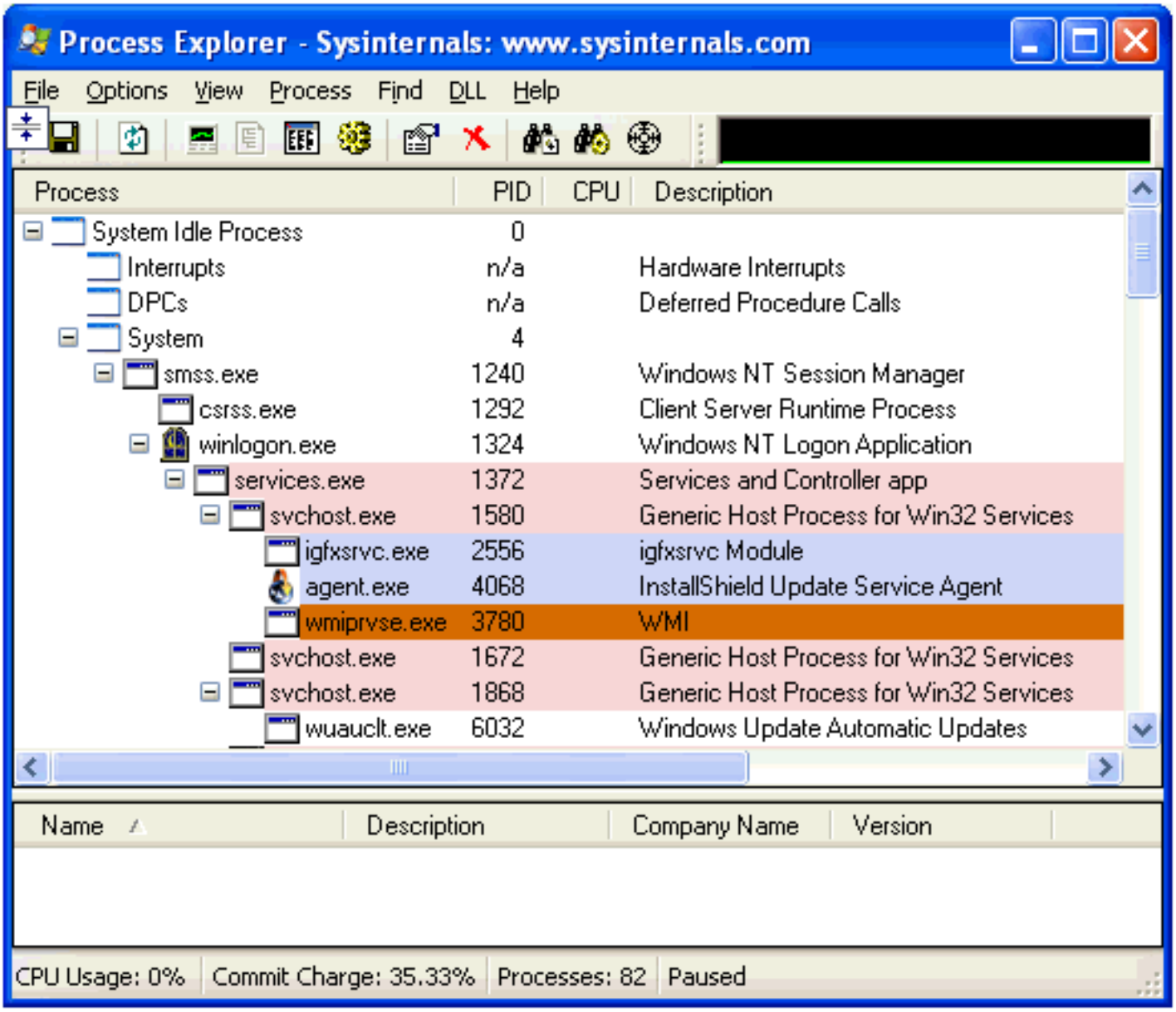
Process Explorer

If you cannot delete the directory for the *E1Local* Oracle Home because a process has it locked, you can use Process Explorer to determine which process has it locked, and subsequently kill that process.

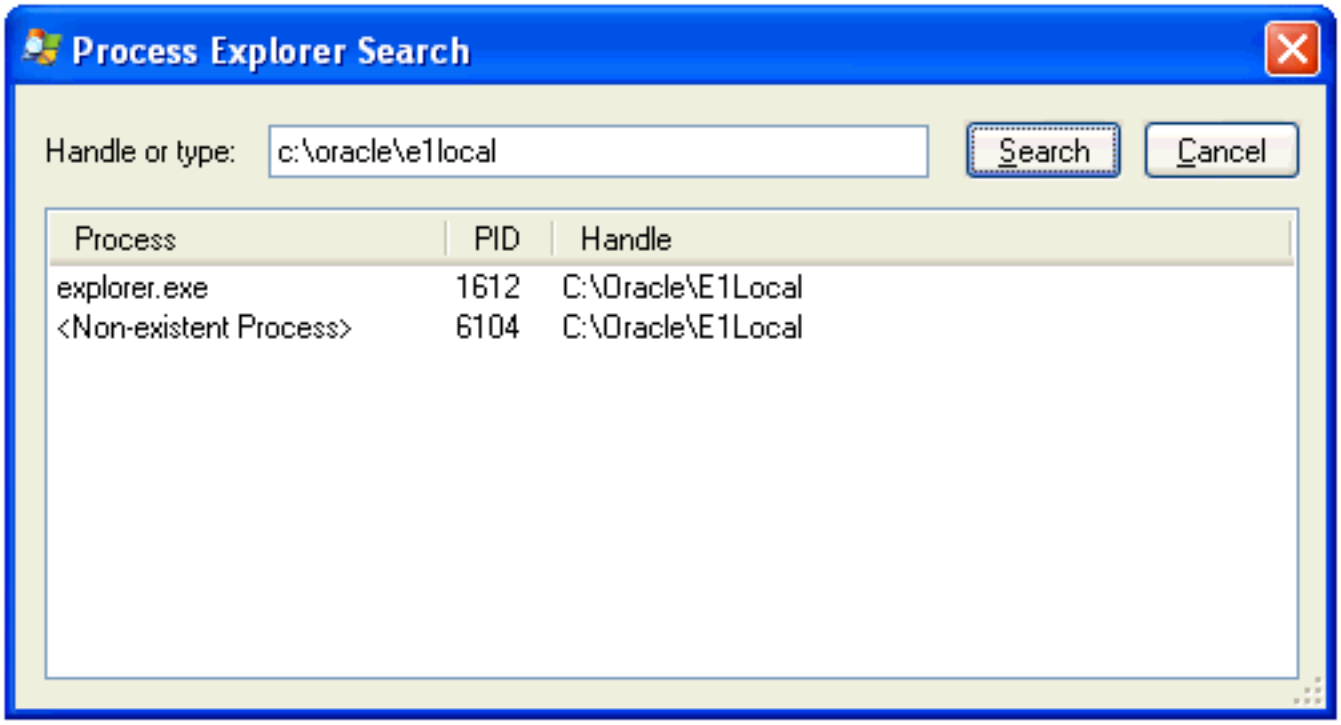
To obtain Process Explorer, you can download and install a free version at this link:

http://technet.microsoft.com/en-us/sysinternals

To use Process Explorer:



1. Navigate to Find > Find Handle or DLL....



2. In the **Handle or type** field, enter the full name of the directory that cannot be deleted. For example:

   ```
   c:\oracle\e1local
   ```
3. Click the Search button.
4. On the search results screen, note the PID(s) (Process IDs) that are associated with the specified directory.
5. Cancel the Process Explorer Search window to return to Process Explorer.
6. Use Process Explorer to kill the identified process(es).

   > **Note:** If one or more of the processes is Windows Explorer (`explorer.exe`), killing it may cause the computer to lock up. If that happens, you will need to reboot the Deployment Server machine. The process `oracle.exe` is the local Oracle database engine. If it has a file locked, you can stop the service **OracleServiceE1LOCAL**.

7. If one or more of the processes locks a file in the directory you are trying to delete even after rebooting, you may have to determine which service is automatically starting that process and change the service to manual startup. Then reboot the Deployment Server machine and delete the directory.

Verifying the Local Oracle Database Installation

To verify that the installation of the local Oracle database was successful:

1. Inspect the latest logs in these directories:

   ```
   <E1_install_dir>\InstallLogs
   ```

   ```
   C:\Program Files\Oracle\Inventory\logs
   ```
2. Resolve any issues that are identified in the logs.

Deployment Server Installation Problems

You cannot reinstall the local Oracle database using the Deployment Server installer if there are indications that the local Oracle database already exists. The Deployment Server installer will skip the installation of the local Oracle database if either of these conditions is true:

- The local Oracle database service **OracleServiceE1LOCAL** is running.
- This registry key exists:

  \HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\ORACLE\KEY_E1Local

Runtime Problems

This section discusses:

- *Jde.log shows ORA-12541: TNS:no listener*
- *User gets a pop-up window prompting for E1Local DB user and password and Jde.log shows OCI0000141 - Error - ORA-01017: invalid username/password; logon denied*
- *tnsnames.ora*

Jde.log shows ORA-12541: TNS:no listener

Verify that the Oracle listener service **OracleE1LocalTNSListener** is running. It is possible that the service may not have started due to slow bootup of the machine.

User gets a pop-up window prompting for E1Local DB user and password and Jde.log shows OCI0000141 - Error - ORA-01017: invalid username/password; logon denied

Verify that the E1Local database system account password is valid. If the following command executes successfully, it means that the password is not encrypted. If so, you must encrypt the password in order to enable database access.

```
SQLPlus.exe system/admin@E1Local
```

where "admin" is the password. This password may have been set to "admin" by one of the EnterpriseOne database scripts, or it may be a plain-text word that someone set by running `ReconfigureDB.exe`.

If the password was decrypted with `ReconfigureDB`, you should re-encrypt it using `ReconfigureDB.exe`. Refer to the sections of this guide entitled: *Understanding the ReconfigureDB.exe Program* and *Encrypting and Decrypting the Password of the Local Database*.

tnsnames.ora

When the Deployment Server installer installs the local Oracle database (**E1Local**), the `\bin` directory is added to the start of the Windows PATH. If you have both the local Oracle database and the Oracle client installed (for example, if you are connecting to an Oracle database on a machine other than the Deployment Server), the local Oracle database version of the executables and `tnsnames.ora` are used. In order to maintain functionality of the Oracle client, you should add the remote database server tnsnames entries into the `tnsnames.ora` used by **E1Local**, which is located in this directory:

<OEE_installation_path>\network\admin

By default, the **<OEE_installation_path>** is **C:\Oracle\E1Local**, but the actual value is specified during OEE installation.

Administering the Local Oracle Database Using SQL Plus

The command-prompt program **SQLPlus.exe** and GUI program SQL Developer are provided with the installation of the local Oracle database using the Deployment Server installer. You can use either tool to access the local Oracle database where both the user and default password are the same as the tablespace name. If using SQLPlus, the command to sign into a database is:

```
SQLPlus.exe <user>/<password>@E1Local
```

For example, if the tablespace JDESY920 exists in the E1Local database, use the following to sign in:

```
SQLPlus.exe JDESY920/JDESY920@E1Local
```

Understanding the ReconfigureDB.exe Program

The installation of the Deployment Server delivers a utility called **ReconfigureDB.exe**. This program can be used by a database superuser who for Oracle is the user for the **SYSTEM** and **SYS** accounts, while for SQL Server Express (SSE) it is the user of the **SA** account. Only users of these accounts can encrypt and decrypt the password for the **local database** on the Deployment Server. Throughout this text, the term **local database** refers to the database that is installed directly on the Deployment Server. Depending on the release of EnterpriseOne, the supported database could be Oracle or SQL Server Express as specified in the Certifications for JD Edwards EnterpriseOne (refer to *Accessing Certifications* of this guide).

The **local database** password must be encrypted for JD Edwards EnterpriseOne to run on the Deployment Server. In order to provide security and uniqueness, JD Edwards EnterpriseOne generates this password using a combination of the serial number of the local C drive and a proprietary encryption algorithm. Therefore it is assured that this password will not be the same on different computers.

> **Tip:** With EnterpriseOne Tools Release 9.2.0.0 and later and an Oracle local database, the method of creating the password changed to produce a more complex and secure password. In these notes and the **ReconfigureDB.exe** program, the old method is referred to as using **Legacy** encryption; whereas, the new method uses **Enhanced** encryption. **Important:** Enhanced encryption is applicable only to an Oracle local database when using Tools Release 9.2.0.0 and greater. Legacy encryption is used with an Oracle local database when using Tools Releases prior to 9.2.0.0 or with SQL Server Express (using any supported Tools Release). **Important:** Prior to running JD Edwards EnterpriseOne on the Deployment Server, you must ensure that the password of the superuser of the local database is set to the relevant encryption using **ReconfigureDB.exe**. This is done by selecting a program option appropriate for your database and Tools Release:
>
> - **Enhanced Encryption**
>
>   You should use this option with the local Oracle database and Tools Release 9.2.0.0 and greater.
>
> - **Legacy Encryption**
>
>   You should use this option with any local database and Tools Releases prior to 9.2.0.0.
>
>   You can also use this option with the SQL Server local database with any supported Tools Release.

Note: With Tools Release 9.2.0.0 and greater, the program for changing the password of the superuser of the local database is **ReconfigureDB.exe**. The program allows these password options:

- Plain Text
- Enhanced Encryption
- Legacy Encryption

Prior to Tools Release 9.2.0.0, the comparable program was called **ReconfigureMSDE.exe** and provided only the options for plain text and (Legacy) Encryption.

The **ReconfigureDB.exe** program runs in either interactive or silent mode. If no command-line options are given, the program launches a Graphical User Interface (GUI). If any command-line options are specified, the **ReconfigureDB.exe** program runs silently. In both cases, output from the program is written to this log:

C:\ReconfigureDB.log

You can determine the functionality and command syntax of the **ReconfigureDB.exe** program by executing the program with either the **/?** or **-H** options. For example:

ReconfigureDB.exe /?

or

ReconfigureDB.exe -H

When you execute the command with these options the output is not directed to the console; instead the output is written to this file:

c:\ReconfigureDB.log

The contents of the **ReconfigureDB.log** file are shown below:

```
ReconfigureDB.exe

1) Changes the password for the database "superusers" for the LOCAL
   EnterpriseOne database.
2) Can change to or from an encrypted password which is needed for E1 to run.
   This password is generated based on the C drive's serial number and then
   encrypted based on E1 proprietary algorithms; hence, this password will not
   be the same on different computers.
3) Can also change to or from user-specified passwords.
4) The program works on the following local databases--and ONLY these
   databases:
    - E1Local
        Type:  Oracle Enterprise Edition (OEE)
        Users: SYSTEM and SYS
    - JDESSELocal
        Type:  Microsoft SQL Server 2005 Express Edition (SSE)
        User:  SA

IMPORTANT NOTE:  With EnterpriseOne Tools Release 9.2.0.0 and later, the
                 method of creating the password changed to produce a more
                 complex and secure password.
```

```
                In this program, the old method is referred to as using
                "Legacy" encryption; whereas, the new method uses
                "Enhanced" encryption.


!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!
!!!  IMPORTANT !!! IMPORTANT !!! IMPORTANT !!! IMPORTANT !!! IMPORTANT !!!
!!!  The superuser password must be set to the E1 encrypted password   !!!
!!!  for E1 to work. Select "Enhanced" for Tools Release 9.2.0.0       !!!
!!!  and later. Select "Legacy" for older Tools Releases.            !!!
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!

SYNTAX
  ReconfigureDB [-options] [Old_Password|-E|-L] [New_Password|-E|-L]

LOG FILE
- The log file is  C:\ReconfigureDB.log

OPTIONS
- May be preceded by either a slash (/) or hyphen (-).
- May be either upper- or lowercase.
- Include one space before the slash or hyphen.
- The order of the options is important. The old password (or option -E or -L)
  must come before the new password (or option -E or -L).
- If  an old password (or option -E or -L) is given, a new password (or
  option -E or -L) must be given.
- If no options are provided, a GUI will prompt for the type of database and
  the passwords.

? or -H             - Writes this help to the log file.
                    - Optional.

-T[ORACLE|SSE]      - The database server instance type.
                    - Optional. If not specified, the default value is
                      ORACLE.

Old_Password|-E|-L  - May be one of the following:
                        1) Old password
                        2) -E  = Indicates that old password was created using
                                 the ENHANCED (i.e., more complex) generation
                                 algorithm.
                        3) -L  = Indicates that old password was created using
                                 the LEGACY (i.e., less complex) generation
                                 algorithm.

New_Password|-E|-L  - May be one of the following:
                        1) New password
                        2) -E  = Indicates that new password should be created
                                 using the ENHANCED (i.e., more complex)
                                 generation algorithm.
                        3) -L  = Indicates that new password should be created
                                 using the LEGACY (i.e., less complex)
                                 generation algorithm.

EXAMPLE
  In this example, the password for the JDESSELocal database SA user will be
  changed from "MyOldPassword" to a generated password that is then encrypted
  with the new enhanced method:

     ReconfigureDB -TSSE MyOldPassword -E
```

Encrypting and Decrypting the Password of the Local Database

When the **local database** is Oracle, *JD Edwards EnterpriseOne* uses an encrypted password to connect to **E1Local** through the **SYSTEM** and **SYS** accounts.

When the **local database** is SQL Server Express, JD Edwards EnterpriseOne uses an encrypted password to connect to **JDESSELocal** through the **SA** account.

Some of the administrative database scripts on the Deployment Server decrypt this password before submitting database commands. Upon exit, such programs subsequently then re-encrypt the password. If one of these scripts fails to complete (for example, it is killed or it otherwise fails) before it can encrypt the password again, JD Edwards EnterpriseOne will not be able to connect to the database. You can determine if this is the case by attempting to sign into the local Oracle database using this command:

```
SQLPlus.exe system/admin@E1Local
```

where "admin" is the default password that the scripts use.

If you can sign in, the password must still be decrypted. You must re-encrypt the **SYSTEM**, **SYS**, or **SA** account password using the following steps for EnterpriseOne to operate correctly.

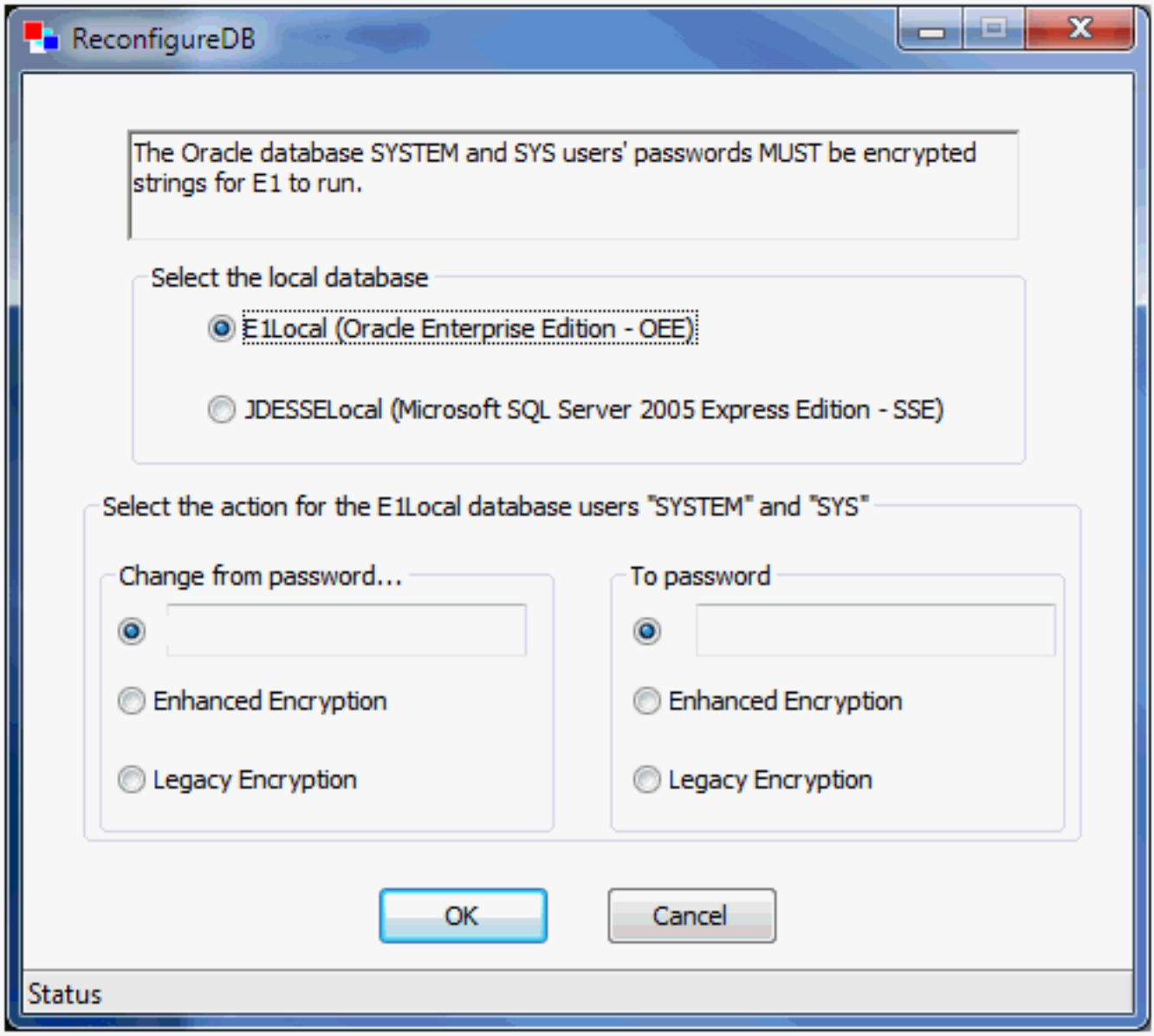
1. Launch the `ReconfigureDB.exe` program located in this directory:

   ```
   <E1_install_dir>\system\bin32\ReconfigureDB.exe
   ```

   > **Note:** You do not have to right click on `ReconfigureDB.exe` and select **Run as administrator**. This is because this version of the program is designed to automatically attempt to start with the elevated permissions. If you are not signed into Windows with an administrative account, you will be prompted to enter the credentials for an administrative account.

   If you do not specify any command line options, this program will launch in GUI mode and you can proceed as described in the following steps in this section. Optionally you can use command line options to execute `ReconfigureDB.exe .`

   > **Tip:** For details of syntax and command line options for `ReconfigureDB.exe` , refer to the preceding section in this document entitled: *Understanding the ReconfigureDB.exe Program*.



2. On the main ReconfigureDB screen, the **Select the local database section** lists the types of local databases that are currently installed; options for database types that are not installed will be inactive.

   - **E1Local (Oracle Enterprise Edition - OEE)**

     This is the only valid option for JD Edwards Applications Release 9.1 (E910) and greater.
   - **JDESSELocal (Microsoft SQL Server 2005 Express Edition - SEE)**

     You should choose this if the local database is SSE, which is a valid option in JD Edwards Applications Releases prior to 9.1 (E910).

3. In the **Select the action for the E1Local database users** section, the first column titled **Change from password...** indicates the old password; that is, the **from** password that you want to change. Select one of the available options:

   - **A plain text password**

     Specify the password in the input field if you know that it was not generated with one of the two types of encryption. For security purposes, your keystrokes are displayed as asterisks.
   - **Enhanced Encryption**

     Click this radio button if the old password was encrypted with the enhanced encryption that is applicable to a local Oracle database and Tools Release 9.2.0.0 or greater. This option uses an enhanced encryption algorithm (relative to prior releases) providing greater security for the local Oracle database.
   - **Legacy Encryption**

     Click this radio button if the old password was encrypted with the legacy encryption that is applicable to the local databases which can be either:

     - Oracle on Tools Release prior to 9.2.0.0
     - SQL Server Express on any supported Tools Release

     This option uses an older, less secure encryption algorithm (relative to later releases) providing less security for the local database.

4. The second column titled **To password** indicates the new password; that is, to what you want to change the password. Select one of the available options:

   - **A plain text password**

     Use this option if you do not want to use either of the two types of encryption. For security purposes, your keystrokes are displayed as asterisks.

     > **CAUTION:** If you select the plain text password option, ensure that you re-encrypt the password before attempting to run JD Edwards EnterpriseOne. If the password is not encrypted with the correct type of encryption, JD Edwards EnterpriseOne will fail because it cannot access the local database.

     > **Note:** The password cannot contain any spaces. Spaces at the start or end of the password will be removed.

   - **Enhanced Encryption**

     Click this radio button if the new password will be encrypted with the enhanced encryption that is applicable to a local Oracle database and Tools Release 9.2.0.0. The option uses an enhanced encryption algorithm (relative to prior releases) providing greater security for the local Oracle database.

   - **Legacy Encryption**

     Click this radio button if the old password will be encrypted with the legacy encryption that is applicable to the local databases which can be either:

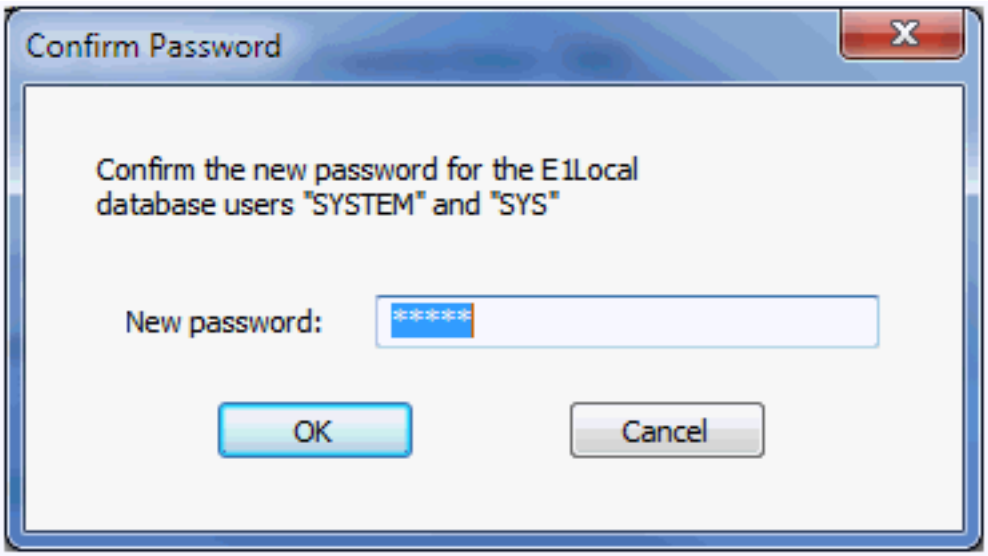
     - Oracle on Tools Releases prior to 9.2.0.0

       or

     - SQL Server Express on any supported Tools Release

     This option uses an older, less secure encryption algorithm (relative to later releases) providing less security for the local database.

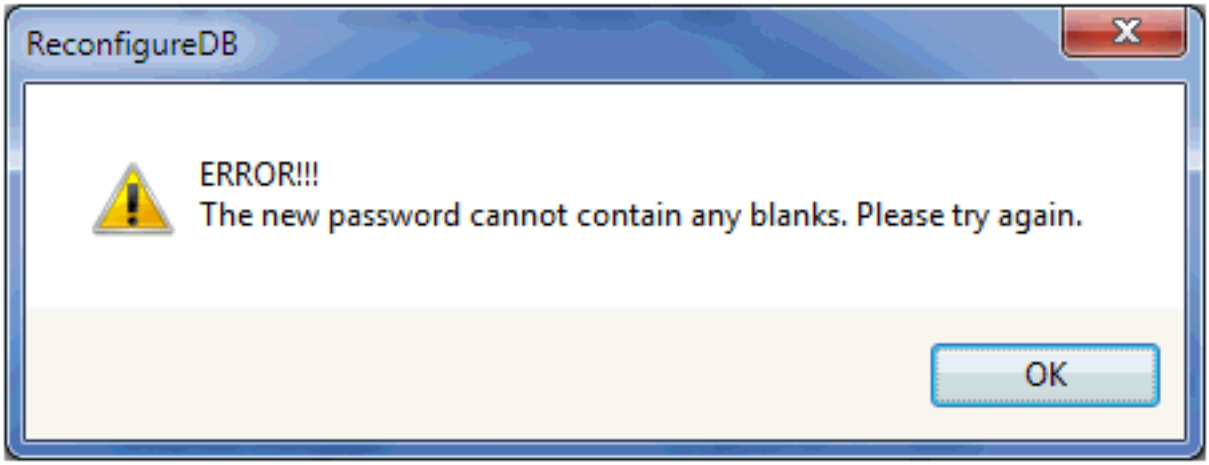
5. Click the **OK** button.



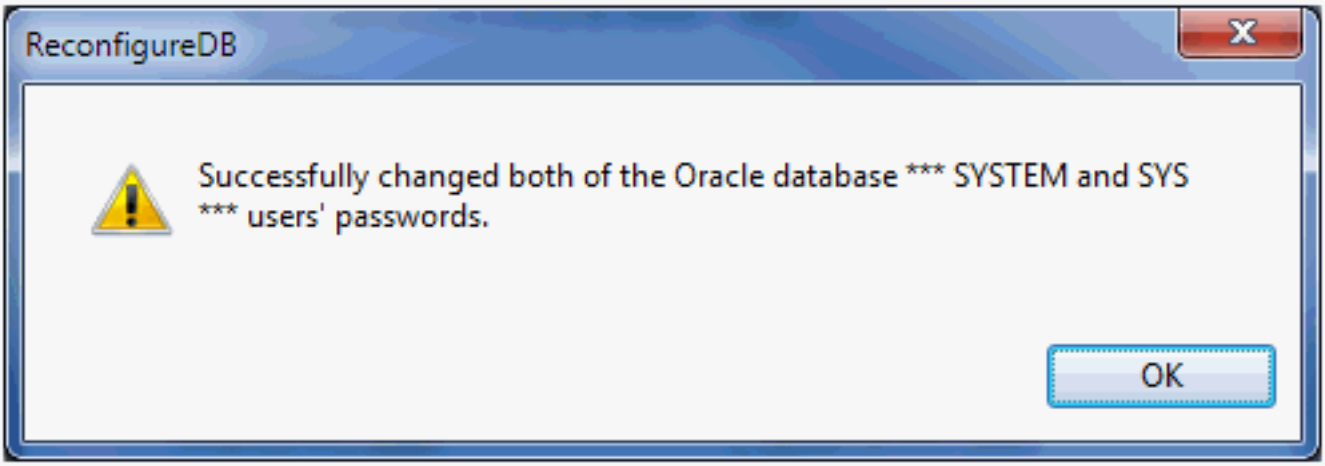
6. On Confirm Password, re-enter the password in the **New password:** field.

   This is to confirm the new password for local database users which are **SYSTEM** and **SYS** for an Oracle database and **SA** for an SSE database.

   The password value cannot contain a space character (blank). Attempting to do so causes this error to be displayed



7. Click the **OK** button.



   A dialog box indicates that the password was successfully changed. Click the **OK** button to exit the dialog.

8. Watch the status bar at the bottom of the dialog for informational messages.

Tip: If changing the password fails, look in this log file for additional information: `C:\ReconfigureDB.log` Also, ensure you are using the correct password as perhaps the password you are trying is not what you thought it was. If neither of the above helps resolve a password failure, attempt to stop and restart these database services: Oracle Database

- OracleServiceE1LOCAL
- OracleE1LocalTNSListener

SSE Database

- JDESSELOCAL

After the database services are stopped and restarted, you can retry **`ReconfigureDB.exe`**.

Import and Export Tablespaces to the Local Oracle Database

You can use the *JD Edwards EnterpriseOne* application P96717 to import and export tablespaces *except* the Planner. To import or export the Planner tablespaces, you must use scripts that are delivered with the installation of the Deployment Server. The scripts are located in this directory:

For Planner Databases:

`<E1_install_dir>\planner\data`

For local metadata repository database (for example, specs and serialized objects):

`<E1_install_dir>\planner\spec`

This section discusses:

- *Import Tablespace Script (attach_planner.bat)*
- *Export Tablespace Script (detach_planner.bat)*

Import Tablespace Script (attach_planner.bat)

To use the import tablespace script:

1. Navigate to the directory **`JDEdwards\ E920 \planner\data`** and run this script:

   `TestPlannerDBs.bat`
2. Edit the **`attach_planner.bat`** file such that any tablespaces that you do not intend to import are commented out. These lines start with:

   `call %DATA_PATH%\IMPORT_TABLESPACE.BAT`
3. Open a command prompt window by right-clicking on a Command Prompt shortcut and selecting **Run as administrator**.
4. Change directory to the location of the batch files.
5. Run the batch file to import the tablespace using this syntax:

   `attach_planner.bat <database_password> <E1_install_dir>`

   For example:

```
attach_planner.bat default c:\JDEdwards\ E920
```

Note: This import batch file for the local metadata repository is in the spec directory: `attach_metadata.bat`

Export Tablespace Script (detach_planner.bat)

To use the export tablespace script:

1. Edit the `jdedwards\ E920 \planner\data\detach_planner.bat` file such that any tablespaces that you do not intend to import are commented out. These lines start with:

   ```
   call %DATA_PATH%\EXPORT_TABLESPACE.BAT
   ```
2. Open a command prompt window by right-clicking on a Command Prompt shortcut and selecting **Run as administrator**.
3. Change directory to the location of the batch files.
4. Run the batch file to import the tablespace using this syntax:

   ```
   detach_planner.bat <E1_install_dir>
   ```

   For example:

   ```
   detach_planner.bat c:\JDEdwards\E920
   ```

   Note: This export batch file for the local metadata repository is in the spec directory: `detach_metadata.bat`

Updating the InstallManager.htm File

To install a database or the Development Client onto a Development Client machine, the user runs this program:

```
\\<deployment server name>\<release>\OneWorld Client Install\InstallManager.exe
```

This program displays a Graphical User Interface that provides several options for the user to perform. The options that `InstallManager.exe` displays are read from the file `InstallManager.htm` that resides in the same directory as `InstallManager.exe`.

The JD Edwards EnterpriseOne administrator can edit this file to rename the options or to add new options. Instructions are inside the file.

CAUTION: Although `InstallManager.htm` is in HTML format, it is a restricted HTML that the `InstallManager.exe` can read. Some text file editing programs add extraneous HTML tags that `InstallManager.exe` cannot recognize. The Microsoft Windows program `Notepad.exe` is an example of a program that is known to not add these extra tags, making it safe to use. Before you make any changes to the file, it is good practice to save a copy in case any changes that you make are not recognized by `InstallManager.exe` when it reads it.

Note that the installation path of the Development Client's installer (`setup.exe`) changed with Tools Release 9.1. This means that you will need to change the path of the Development Client's installer in the `InstallManager.htm` when you first install Tools Release 9.1 and greater onto a Deployment Server that has a tools release prior to 9.1 installed.

The following is an example of a line in a pre-9.1 `InstallManager.htm` that creates the link to install the Development Client (this should be on a single line):

```
<a class="sectionItem" id="LaunchLink" link="setup.exe" href="InstallManager.htm">EnterpriseOne Client</a>
```

The Development Client's installer prior to Tools Release 9.1 is called **setup.exe**. It should be in the same directory as **InstallManager.exe** and **InstallManager.htm**. The value of the link in the above line should be a path and executable for the installer. If a relative path is used (for example, the path starts with neither a drive letter followed by a colon nor a backslash), the path is relative to the location of **InstallManager.exe**. If no path is given, **Setup.exe** and **InstallManager.exe** are in the same directory.

Here is an example of a similar line for Tools Release 9.1 and greater (this should be on a single line):

```
<a class="sectionItem" id="LaunchLink" link="install\setup.exe" href="InstallManager.htm">EnterpriseOne Client</
a>
```

Note the addition of this relative path: **install**. With Tools Release 9.1 and greater, the Development Client's installer (which, is also called **setup.exe**) is now located in a subdirectory called **install** under the path where **InstallManager.exe** resides.

Deployment.inf and <Package_name>.inf

The following lists specific settings within the Deployment.inf and **<Package_name>.inf** for OEE.

- **Deployment.inf**

  ```
  [ThirdPartyApps]ORACLE=ThirdParty\ORACLE\OEE12Setup.exe,
  ```

- **<Package_name>.inf** (example from a **DV920FA.inf** file)

  ```
  [Oracle Databases]
  JDELocal_
                                          DV920
                                        =ORACLE
  SPEC_DV920FA=ORACLE

  [JDELocal_
                                          DV920
                                        ]
  SourceTableSpace=JDELocal
  Server=127.0.0.1
  UserID=SYSTEM
  DataFileDestDir=$D
                                          DV920
                                        DATA\JDELocal_
                                          DV920
                                        .dbf
  DumpFileDestDir=$D
                                          DV920
                                        DATA\JDELocal_DV920.dmp

  [SPEC_DV920FA]
  SourceTableSpace=SPEC_DV920FA
  Server=127.0.0.1
  UserID=SYSTEM
  DataFileDestDir=$D
                                          DV920
                                        \Spec\SPEC_DV920FA.dbf
  LogFileDestDir=$D
                                          DV920
  ```

```
\Spec\SPEC_DV920FA.dmp
```