JD Edwards EnterpriseOne Tools

Software Updates Guide

9.2

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Software Updates Guide

9.2

Part Number: E53540-20

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Preface

Welcome to the JD Edwards EnterpriseOne documentation.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at *http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc* .

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit *http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info* or visit *http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs* if you are hearing impaired.

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.

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1 Introduction to Software Updates

Software Update Overview

JD Edwards EnterpriseOne Software Update distributes the following types of updates.

- Electronic Software Update (ESU) is a fix to a problem reported on a specific JD Edwards EnterpriseOne application or report.

- Application Software Update (ASU) is a set of enhancements for a specific functional area of EnterpriseOne applications.

- Language Update contains the translated language updates associated with a Software Update. This is only applicable to customers that have a base language installed.

- Maintenance Pack (MP) is a group of all currently available fixes and in some cases, enhancements.

- Tools Release is a group of all fixes to JD Edwards EnterpriseOne foundation (System) code.

All are installed on the deployment server, deployed to a path code, merged with custom code as necessary, and validated before rollout to production users.

Using My Oracle Support

My Oracle Support is your link to customer support functions, the latest release information, and the Update Center. Select the Patches and Downloads tab and JD Edwards Products link to access the Update Center. Link to the Update Center to research and download updates for the entire line of Oracle's JD Edwards EnterpriseOne products.

Using Update Documentation

Each software update includes documentation that describes the contents of the update and includes instructions specifically related to that update.

For an ESU, the documentation is in the form of an HTML document (JL12345.htm) packaged within the download or accessible online before downloading. This document includes a list of SARs fixed by the update, the list of objects modified in the update and a section detailing special installation instructions to implement the fix. Each ASU and Service Pack distribution CD includes a cover letter in PDF format. Read the cover letter before installing the update.

The cover letter includes this information:

- An overview of the installation process.

- Information related to running the update application.

- Manual steps specific to the update (for example, processing option and application setup).

- Other Software Updates that must be applied before or after the Software Update from the CD.

- Any changes to JD Edwards EnterpriseOne Certifications (MTRs) required by this update.

Each Tools Release includes an HTML document detailing SARs fixed by this release, installation instructions, and special considerations for this release.

Implementing Software Updates

All JD Edwards updates follow this basic process flow:

1. Prepare for the update.
2. Acquire the update from the appropriate source.
3. Install the update on the deployment server.
4. Deploy the update to the Pristine and Development environments.
5. Retrofit custom modifications and complete specific tasks relevant to the update.
6. Validate the applied update in a safe environment.
7. Rollout the update to production users.

2 Preparing for a Software Update

Understanding the Update Process

To update JD Edwards EnterpriseOne successfully, complete the following checklist before starting the update process:

- Apply the latest JD Edwards EnterpriseOne Planner ESU prior to applying any JD Edwards EnterpriseOne Applications ESUs in order to ensure that updates are merged as expected.
- Complete a thorough Impact Analysis to consider the benefits and costs of applying each update.
- Prepare the prototype environment.
- Prepare the development environment.
- Check modification and merge flags.
- Backup critical data.
- Verify custom changes in master control tables.

Note:
- *Using the Software Update Impact Analysis Tool*.

Performing an Impact Analysis

Before you deploy any update, complete a thorough analysis of the benefits and costs associated with each update. Not all updates are relevant to your business or to the way you conduct your business. Careful planning at this stage is critical to the success of applying an update. It is recommended that you perform the impact analysis in two phases:

1. Perform a rough cut by reviewing SARs associated with the update. This review will help you determine if the update is relevant to your needs.
2. If you determine that an update is relevant, download and install it to your deployment server. Use the Impact Analysis tool to conduct a thorough review, or apply and run the update in the Pristine environment (PS900).

The Impact Analysis tool provided with JD Edwards EnterpriseOne helps perform an impact analysis. A key feature of this tool is a list of the objects in the update that you have modified. You must reapply the modifications using the JD Edwards ER Compare tool.

Note:
- *Using the Software Update Impact Analysis Tool*

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Knowing what an Update Preserves and Replaces

This section discusses the considerations that are important if your business requires custom modifications. An update does not change or delete any new JD Edwards EnterpriseOne object you create. However, if you modify a standard JD Edwards EnterpriseOne object or interface to an object, there may be an impact to your modifications when applying an update.

These rules describe which of your modifications the update process preserves and which modifications the update replaces.

1. "Preserve" means that during an update you do not lose your custom modifications when the software you currently have installed automatically merges them with the new JD Edwards EnterpriseOne applications shipped with the update. If there is a direct conflict between your specifications and JD Edwards EnterpriseOne specifications, the update process uses your specifications. When there is no direct conflict between the two, the update process merges the two specifications.

2. "Replace" means the update replaces your modifications and does not merge them into the update. You will need to redo your custom modifications after the update completes.

   Note: If possible, transfer all modifications to one path code. Do this only if you have tested and approved all modifications or if you have modifications only in development. Having only one environment to update significantly shortens the process.

To ensure an accurate and predictable update, follow these rules as you modify your JD Edwards EnterpriseOne objects.

Interactive Application Rules

Do not delete controls, grid columns, or hyperitems on existing JD Edwards EnterpriseOne applications; instead, hide or disable them. The updates might use these items for calculations or as variables, and deleting them might disable major functionality.

The update process replaces the current application that resides in your Central Object database. Use Oracle's JD Edwards ER Compare to restore custom changes. This set of tools helps you restore custom changes to:

- New hyperitems.

- New controls and their event rules.

- 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.

An update replaces custom forms on existing JD Edwards EnterpriseOne applications.

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Report Rules

These rules apply to report specifications that were created using Report Design.

An update preserves these changes:

- New reports.
- New objects to existing 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.

An update replaces custom sections on existing reports.

Application Text Changes

An update preserves overrides done in Oracle's JD Edwards EnterpriseOne Form Design Aid (FDA), Report Design, or Interactive or Batch Vocabulary Overrides.

Table Specification Rules

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

An update preserves these changes:

- New tables
- New indexes

An update replaces columns added or removed from existing JD Edwards EnterpriseOne tables. This includes changing field length, field type, and decimal position.

Instead of adding a new column to an existing JD Edwards EnterpriseOne table, use Oracle's JD Edwards EnterpriseOne Table Design Aid to create a second table that has the same key as the first table and add your modifications to the new table. Use system codes 55 -59. For custom tag files, be aware of data item changes in the JD Edwards EnterpriseOne 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.

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For this reason, you might need to use Oracle's JD Edwards EnterpriseOne Table Conversion tool to convert the tag file data to the new release level. For base tables, the update process takes care of the data dictionary changes by upgrading the JD Edwards EnterpriseOne database to the new release level.

An update preserves custom indices over the custom tag files.

See *JD Edwards EnterpriseOne Tools Table Conversion Guide* .

Control Table Rules

An update merges your control tables during an update using the Change Table process, a delta between the base product and the update, as the basis to do the data merge.

An update preserves these changes:

- Data dictionary custom changes, such as changes to row, column, and glossary text. The update process uses your data dictionary as the base. If there is a conflict with JD Edwards EnterpriseOne data items, your changes override them.

- User-defined codes. The update process merges any new hard-coded JD Edwards EnterpriseOne values. (Values owned by JD Edwards EnterpriseOne are system 90 and higher, and H90 and higher.) The process also reports any JD Edwards EnterpriseOne hard-coded values that conflict with your custom values.

- Oracle's JD Edwards EnterpriseOne Workflow. The update process merges any JD Edwards EnterpriseOne additions, updates, or deleted workflow processes in your data. If there is a conflict with your workflow processes, JD Edwards EnterpriseOne overrides them.

Business View Rules

Do not remove columns from existing business views. Changing business views that applications use can cause unpredictable results when you run the application. If you need to hide columns, do so at the application design level using either FDA or Report Design. Performance is not greatly improved by deleting a few columns from a business view.

An update preserves these changes:

- New custom business views.

- New columns, joins, or indices to the existing business views.

An update replaces columns that you have removed from JD Edwards EnterpriseOne business views.

Rules for Event Rules

An update replaces all modifications that you have made to applications, including custom event rules. Use FDA and ER Compare to restore your customizations after an update.

An update replaces modifications that you have made to JD Edwards event logic in reports, tables, and Named Event Rules (NER).

An update preserves new, custom logic that you have added to reports, tables, and NER on events with no previous or current JD Edwards logic.

Data Structure Rules

An update preserves all of these custom data structures:

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

An update replaces these custom modifications to JD Edwards EnterpriseOne data structures:

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

Preparing Environments for Update

This section discusses how to:

- Prepare the prototype environment.
- Prepare the development environment.
- Check the modification and merge flags.
- Verify custom changes in master control tables.
- Back up servers and databases.
- Prepare the localization update.

In Tools Release 9.2.5 and later you can use long database passwords. You must perform the software update process with the Security Server turned on if you are using long database passwords. The system user passwords must be changed using P98OWSEC or P98LPSEC and you must add security overrides to all data sources prior to applying ESUs with the Security Server turned on. Add security overrides for the following data sources:

- System – 920
- Object Librarian – 920
- Data Dictionary – 920
- Business data, control tables, and versions for each environment

For example, you can add security override as:

- Business Data – TEST

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- Control Tables – Test
- Versions – DV920

Note: You cannot specify a password longer than 10 characters if you are using the [DSPWD] section in the jde.ini file.

For more information, see the appendix "Adding a Security Override for Package Build" in the JD Edwards EnterpriseOne Tools Package Management Guide and the section "Change Default EnterpriseOne System User Passwords for the Database" in the JD Edwards EnterpriseOne Tools Security Administration Guide.

Preparing the Prototype Environment

This table lists the requirements for preparing the prototype environment.

Task	Details
Personnel	Installer or system administrator
Logon status	On the deployment server, in the deployment environment, logged on as user JDE with the database password for user JDE.
Prerequisites	None
Concurrent Tasks	None

To make sure you retain all modifications from the base prototype environment, complete these tasks:

- Transfer all tested and approved modifications to the base prototype path code.
- After the transfer finishes, build a prototype package.
- Deploy the prototype package to workstations you want to run at the base release.
- Verify the Central Object Database is large enough to accommodate the update.

Preparing the Development Environment

This table lists the requirements to prepare the development environment.

Task	Details
Personnel	Installer or system administrator
Logon status	On the deployment server, in the development environment, logged on as user JDE with the database password for user JDE.
Prerequisites	None
Concurrent Tasks	None

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Task	Details

To make sure you retain all modifications from the base development environment, complete these tasks:

- Make sure that all work in progress is checked into the development path code. From a development workstation, use the Promotion Manager or your own query or report to verify that objects are not checked out.

- Build the development package in preparation for deployment to one or more workstations.

Deploy the development package to one or more workstations. You will use these workstations later to help verify that all modifications were carried forward to the new release.

While you update, you cannot make any modifications (except changes to custom business functions written in C language) to carry forward to the next release.

Verify the Central Object Database is large enough to accommodate the update.

> **Note:**
> - *"Understanding Objects" in the JD Edwards EnterpriseOne Tools Package Management Guide* .
> - *"Building Packages" in the JD Edwards EnterpriseOne Tools Package Management Guide* .

Checking Modification and Merge Flags

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

Do not run the Specification merges until you check the flags for all path codes containing modified objects.

Check modification and merge flags:

This table lists the requirements for checking modification and merge flags.

Task	Details
Personnel	Installer or system administrator
Logon status	On a workstation that accesses Object Librarian tables, or from the deployment server, in the deployment environment.
Prerequisites	Make sure you have prepared your environments for the update.
Concurrent Tasks	None

Log onto a workstation or to the deployment environment on the deployment server.

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From the Advanced Operations (GH9611) menu, select Specification Merge Selection (P98401).

1. On Specification Merge Selection, complete these fields:

   ○ **Location**

     Type the name of the deployment server that contains the central objects specifications.
   ○ **Path Code**

     Type the name of the associated path code (prototype or development).
2. On the QBE line, type **C** in the Mod Flag field to list the changed objects, then click Find.
3. For each object that appears in the grid, verify that the Mod Flag field is set to **C**, and the Mrg Opt field is set to **1** (merge), which ensures that the modifications are merged when the specification merges run during the update workbenches.

   Do not set the Mrg Opt field to **1** unless you want objects merged or saved.
4. When you finish reviewing or modifying the records, click Close.

To verify the accuracy of modifications, some additional queries are strongly recommended to avoid missing any modified objects. For example, SY = 55 - 59.

> **Note:** You can also print Oracle's JD Edwards EnterpriseOne Object Librarian Modifications Report (R9840D), which lists all added and modified objects. After the update finishes, review this report to verify whether the object modifications were carried forward to the new release. For more information about the JD Edwards EnterpriseOne Object Librarian Modifications report, see Reports in the Installation Reference Guide.

Verifying Custom Changes in Master Control Tables

This table lists the requirements to verify custom changes in master control tables:

Task	Details
Personnel	Installer or database administrator
Logon status	On the workstation, for each applicable environment, logged on as user JDE with the database password for user JDE.
Prerequisites	None
Concurrent Tasks	None

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1. Verify that these 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

   ◦ F00165 (GT92002)

2. Verify that these master control tables for Solution Explorer tasks reside in a relational database accessed by the Control Tables - Production data source (for production) or Control Tables - CRP (for prototype environments) or Control Tables - Test (for the development environment):

   ◦ F9000

   ◦ F9001

   ◦ F9002

   ◦ F9005

   ◦ F9005D

   ◦ F9006

   ◦ F9006D

   ◦ F9020

   ◦ F9022

   ◦ F9050

3. Verify that these master control tables for user-defined codes reside in a relational database accessed by the Control Tables - Production data source (for production) or Control Tables - CRP (for prototype environments) or Control Tables - Test (for the development environment).

   ◦ F0004

   ◦ F0005

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4. Verify that these master control tables for workflow reside in a relational database accessed by the Control Tables - Production data source (for production) or Control Tables - CRP (for prototype environments) or Control Tables - Test (for the development environment).

   - F98800
   - F98800D
   - F98800T
   - F98810
   - F98810D
   - F98811
   - F98830
   - F98840
   - F98845

5. Verify that the media objects queue paths are configured correctly.

   Use P98MOQUE from the deployment server in both the JDEPLAN and DEPSRV environments.

Backing Up Servers and Databases

Before beginning the software update, back up the entire deployment server, the enterprise server (the complete directory structure for the base installation), and the Oracle or SQL Server databases.

Preparing the Localization update

If you are a Localization customer, you must complete all the tasks in Appendix A: Setting Up Localizations. These tasks describe how to set up the software to automatically handle all future updates to the localization that are installed by ESUs.

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3 Installing Updates on the Deployment Server

Understanding the Deployment Server Installation

> **Note:** For ASUs, service packs, and tools releases, follow the instructions included with each update.

The Deployment Server is the central hub for distribution of Oracle's JD Edwards EnterpriseOne objects to servers and users. The update process delivers changes to the deployment server to integrate with that distribution process. Each update type has a slightly different method of completing this task but the outcome is the same.

The installation process for the deployment server includes these tasks:

- Acquiring the update from the Update Center, Oracle Software Delivery Cloud portal.

- Installing the objects from the CDs or the Web.

Using Update Center to Acquire Updates

Link to the Update Center through My Oracle Support or use Oracle's JD Edwards EnterpriseOne and World Change Assistant from your desktop to acquire all ESUs and updates for other Oracle JD Edwards EnterpriseOne and World products. JD Edwards EnterpriseOne and World Change Assistant streamlines the update process. This versatile tool simplifies the installation and deployment of ESUs and other updates.

> **Note:**
> - *Using Change Assistant*

Using the Oracle Software Delivery Cloud to Acquire Updates

If you already have JD Edwards EnterpriseOne 9.0 software and want to acquire an update, go to the Oracle Software Delivery Cloud portal at *https://edelivery.oracle.com* , or contact your local Customer Care Center. The Oracle Software Delivery Cloud portal enables you to obtain your software electronically. At this portal, you will find instructions for use, available languages, access to download software, and a list of releases that are available for download.

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Installing the Software Update on the Deployment Server

The following process installs the software update on the deployment server. This installation may be from a CD or a download from the Update Center via My Oracle Support or JD Edwards EnterpriseOne and World Change Assistant.

Before you run the installation program, shut down all programs running on the deployment server that could cause Dynamic Link Library (DLL) conflicts (such as Internet Explorer or Adobe Reader).

> **Note:** In order to ensure that updates are merged as expected, it is strongly recommended that you apply the latest JD Edwards EnterpriseOne Planner ESU prior to applying any JD Edwards EnterpriseOne Applications ESUs.

Install the software update on the deployment server:

This table lists the requirements for installing the software update on the deployment server:

Action	Tasks
Personnel	Installer
Logon status	Logged on to the deployment server with administrator rights. You must log off JD Edwards EnterpriseOne before completing this task.
Prerequisites	You must create the JDE user.
Concurrent Tasks	None

To install an ESU that was downloaded from the Update Center:

1. Locate the downloaded JLnnnnn.exe file.
2. Right-click on the self-extracting executable and click on **Run As Administrator.** The Client Workstation Setup Screen appears.
3. Click Next, the package size is calculated. The Installation Setup Type appears.
4. Click Finish.

To install ASUs from a CD:

1. Insert the setup CD into the CD drive.
2. Double-click the InstallManager.exe file. The Installation Setup Screen appears.
3. Click Next, and the package size is calculated. The Installation Setup Type appears.
4. Click Finish.

> **Note:**
> - *Using Change Assistant*

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Note: After completing this step, the update is ready to deploy to an environment. JD Edwards EnterpriseOne updates (ASU and ESU) are located in a folder under the Planner path code (..\Planner\Package\package name).

Note: Complete your Impact Analysis at this time and then continue with deployment using JD Edwards EnterpriseOne and World Change Assistant, the JD Edwards EnterpriseOne Software Updates application, or special instructions included with your update.

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4 Deploying Software Updates (ESUs) Using the Web Client (Release 9.2.7)

Understanding Deploying Software Updates Using the Web Client

Starting with Release 9.2.7, you can also use the JD Edwards Web Client to deploy application patches. Applying updates using the web client enables remote patch management and automation.

The web deployable are available as multi-platform (Portable Archive) package files on the Oracle JD Edwards Update Center.

> **Note:** The self extracting ESUs that can be deployed using the Windows Deployment Server are also available on the Oracle JD Edwards Update Center.

> **Note:** *Click here to view a recording of this feature.*

> **Note:** *Click here to view an OBE of this feature.*

Deploying Software Updates (ESUs) Using the Web Client

This section discusses how to:

- Download an ESU from the Oracle JD Edwards Update Center
- Add or import an ESU using the web client
- Run the software update on the web client
- Validate the software update using reports

Downloading the ESU from the Update Center

The web deployable ESUs are in the multi-platform format.

To download the Electronic Software Update file (ESU) from the Update Center:

1. Access the Oracle JD Edwards Update Center.
2. In the Search section, set these criteria and click Search:
   a. In the Type field, select Electronic Software Updates.

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    b. In the Release field, select 9.2.

    c. In the Platform field, select Multi-platform.

3. Review the search results. Select and download the ESU to your Download Basket.

> **Note:** The description of the multi-platform ESUs is suffixed with *web*. For example, *ESU_JN19899_7/19/22_web*. Only these ESUs can be deployed using the web client.

4. To download the multi-platform ESU using the Change Assistant, refer to the instructions on *Downloading Packages*.

> **Note:** You will need an AIS/REST connection to download the ESU using Change Assistant. For instructions on AIS connection, see the AIS Authorization steps in *Installing Change Assistant*. On successful download, the system transfers the downloaded file to the EnterpriseOne Software Archive Repository table (F96700R).

Adding/Importing the ESU Using the Web Client

To add/import the ESU using the Web Client:

1. Sign in to EnterpriseOne on the web client.
2. From the Software Updates menu (GH9612), select the Work with Software Update - Web application (P96470W).
3. If the ESU is downloaded using Change Assistant:

    a. Click Add.

    b. Select the ESU from the Software Update Portable Archives Search & Select form and click Ok.

    c. Verify the ESU populated in the grid of the Work with Software Updates form.

4. If the ESU is downloaded from the Update Center using the browser:

    a. Select the Form exit, Import.

    b. Click the Choose File button and access the downloaded file. Only one ESU can be imported at a time.

    c. Click the Load button. The file is imported and the application returns to the Work with Software Update – Web (P96470W) application. The new ESU appears in the grid.

5. The system also populates the Software Update Status window on the screen which displays a visual of the deployment status highlighting the current deployment step and the percentage of update remaining.

> **Note:** If the Software Update Status window does not appear, select Software Update Status History from the Layout dropdown menu.

6. The Work with Software Updates form presents these Row exits:

    a. Detail Status - Verify the steps that were run for the selected ESU.

    b. Objects - View the objects delivered with the selected ESU.

    If you have not deployed the ESU, the system shows the list of objects from the manifest table (F96400). If the ESU is deployed, the system shows the list of objects from the Software Update Pathcode Information table (F9672).

    c. Bugs - Displays the list of bugs associated with the objects included in the ESU package. Double-click on the bug to view the bug details.

    d. History - Displays a list of reports from the Table Conversion History Log (F984052). In the Software Update Plan History form, click the View Output icon or the PDF File Name link to download and view the reports.

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> **Note:** If the ESU was applied on the Deployment Server, the View Output column is hidden in the Update Plan History form and the reports cannot be accessed.

   e. Advanced Setup - The Advanced Software Update Setup form displays a list of table components that you can configure to recopy.

   f. Special Instructions - If the downloaded ESU has special instructions in the EnterpriseOne Software Archive Repository table (F96700R), the Special Instructions option is seen in the Row menu. Click Special Instructions to access the Work with Special Instructions form.

   The special instructions for the selected ESU are displayed in the grid. To view the list of enhancement types for localizations, click Enhancements on the Form menu. The system displays the Work with Enhancements form with the list of registered enhancements for your enterprise.

   See *Understanding How to Set Up Localizations* for more information.

Running the Software Update (ESU) Using the Web Client

To run the ESU using the web client:

1. From the Software Updates menu (GH9612), select the Work with Software Update - Web application (P96470W). The Work with Software Updates form is displayed.

2. Select the ESU from the grid.

   > **Note:** The Web Deploy column on the grid identifies the ESU as web deployable. You can only deploy ESUs that have not been installed on the Deployment Server.

3. Select the Row exit and click Deploy. The Software Update Environment Selection form appears.

4. The Backup and Create OMW Project and Package Assembly checkboxes are selected by default.

   If the Backup checkbox is selected, the system creates a backup of object specifications included in the update. If required, the original specs can be restored.

   If the Create OMW Project and Package Assembly checkbox is selected, the system keeps the OMW Project in the Object Management Workbench-WEB program (P98220W) and creates package assembly and build records for the software update in the Work with Packages programs P9601W and P9621W respectively.

   If the Create OMW Project and Package Assembly checkbox is not selected, the system removes the OMW project after the OMW load success. If the OMW load is not successful, the system retains the OMW project even if the checkbox is not selected.

   > **Note:** If Backup is selected, the Create OMW Project and Package Assembly will also be automatically selected.

5. The Software Update Environment Selection form also presents these Row exits:

   a. Restore Backup - If backups were performed for a software update for a specific environment, this option restores all specs and business functions. Control tables are not backed up and hence will not be restored. For information about restoring a backup, see *Restoring a Backup*. This row exit is not applicable for language updates.

   b. Delete Backup - Deletes the backup PAR file created in the EnterpriseOne Software Archive Repository table (F96700R) table. A warning message is displayed if no backup was performed. This row exit is not applicable for language updates.

c. Affected Objects - Displays the list of objects that will be applied. The status of the object is set to *1 - Marked for Selection* in the Software Update Pathcode History form. If the Install Status is set to *0 - Not Selected*, the object will not be applied.

> **Note:** The Change Status option allows you to change the status of the objects individually. You can select an object record and click Change Status to manually update the Install Status. This initiates the Spec Merge UBE (R98700W) to remerge the objects. Refer to *Document 660444.1* for more information on Force Merge.

d. Advanced Setup - When applying software updates to alternate environments, we recommend that you do not perform the spec merge. Instead, transfer objects using OMW. However, this exit enables you to set this option and skip the spec merge.

6. In the Records grid, select the Environment(s) to be updated.
7. Click Ok.

> **Note:** If one or more of the dependent updates are not installed on the selected environment, the process displays a dependency warning with the dependent ESU(s) details. Click Ignore to continue the deployment without the dependent ESU(s). Click Cancel to stop the deployment.

8. The system launches the ESU Deploy form. The Software Updates Status on the Work with Software Updates form shows the percentage of progress. On completion of the deployment, the 100% completion status is seen.
9. The deployment generated reports are listed in the Software Updates Plan History CafeOne layout of the Work With Software Updates form.
    - Click on the View Output icons to view the corresponding reports.
    - (Release 9.2.7.3) Click on the View Log icon to open the jde.log file of the Web Deploy Report (R98701W).

Verify Backup Project PAR File

To verify the backup project PAR file generated in the F96700R table, run the Software Update File Repository program (P96700R). Search for the ESU deployed and verify the corresponding backup file is generated.

For example, if the deployed ESU is *JN198899_01_07.par* then a backup file *PRJ_JN198899_DV920_60_99.par* is generated.

Verify Objects Installed in the Package

To verify the objects included in the package assembly, access the Object Management Workbench - Web program (P98220W). Enter the ESU number followed by * (example, JN198899*) in the Project QBE field. The system displays the objects included in the package in the lower grid of the form.

> **Note:** See the *JD Edwards EnterpriseOne Tools Package Management Guide* to assemble and build the package from the web.

Validating the Software Update

After the deployment of the software update(s) using the web client, the system generates the Deploy Software Update on Web (R96701W) and the Spec Merge for Web Deploy (R98700W) reports.

On completion of the software deployment process, you can view the list of generated reports in the CafeOne window (Software Update Plan History) of the Work With Software Updates form. Click on the View Ouptut icons in the Software Update Plan History section to view the corresponding reports.

The Deploy Software Update on Web (R96701W) summarizes the updated objects in a PDF file. To validate the update process, view the R96701W report and note the value of the Object Install Flag for each of the objects listed in the report:

Object Install Flag Value	Description
0	The object was not updated because the existing object in the environment is more recent that the object in the software update.
1	The object is selected to be applied to the environment. (This is the status of all objects in the list before the upgrade starts, but should not be observed when the update process is complete.)
2	Updated object was applied to the environment.

The Spec Merge for Web Deploy (R98700W) report provides a summarized report of the specification merge of the objects for web deployment.

Enabling UBE Debug Log for R96701W Using P98617

For information on defining report logging for the Deploy Software Update on Web (R96701W) UBE, see *Defining Default Logging Levels for Jobs (Release 9.2.6)* in the *JD Edwards EnterpriseOne Tools Administration Guide*.

Table Create and Alter Records Delivered with Software Updates

The processing of Alter Table and Create Table conversion records has been moved from the ESU deployment process and is now part of the full/update package build and deployment process.

> **Note:** If you chose to defer the table conversion on the deployment server, it will be run only during package build and deployment.

See the Package Management Guide, Chapter 8 "Deploying Packages" for more details.

Deploying Cumulative Software Updates (ASU) Using the Web Client (Release 9.2.8)

> **Note:** *Click here to view an OBE of this feature.*

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Deploying User Defined Objects (UDOs) Using the Web Client (Release 9.2.8.2)

Beginning with Tools Release 9.2.8.2, Update Manager supports the deployment of User Defined Objects (UDOs) packages using the Web Client.

This section discusses how to:

- Download a UDO from the Oracle JD Edwards Update Center.
- Download special instructions from Change Assistant.
- Import the UDO using the web client.
- Deploy the UDO using the web client.
- Validate the UDO deployment using web OMW.
- Run the UDO Impact Analysis on the web client.

Downloading the UDO from the Update Center

1. Access the Oracle JD Edwards Update Center.
2. In the **Search** section, set the following criteria:
   a. In the **Type** field, select *EnterpriseOne User Defined Objects*.
   b. In the **Release** field, select *9.2*.
   c. In the **Platform** field, select *CLIENT*.
3. Enter the UDO name or `UDO*` in the **Search for Name** field to further limit the UDO search and click **Search**.
4. Review the search results.
5. Click the download icon of the UDO you want to add. The UDO package is added to your Download Basket.
6. From the Download Basket, download the UDO as a portable archive (.ZIP) file.

Downloading Special Instructions from Change Assistant

1. Open Change Assistant from the desktop link with an Update Center connection.
2. Expand the **Search for Packages** navigation node to begin searching the Update Center and click **Advanced Search**.
3. Enter the following search criteria and click **Search**.
   - **Type**: `EnterpriseOne User Defined Objects`
   - **Release**: `9.2`
   - **Name**: `UDO_9.2_10600`
4. Select the package from the search results.
5. Use the Tool drop-down to select **Special Instructions**.
6. In the Special Instructions options, select **Special Instructions**.
7. Click **Analyze Packages** to view the report. The system downloads the data into the EnterpriseOne Software Archive Repository table (F96700R) table.

   Note: Hover over the processing icon at the top of the browser window to view background processes.

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8. The Summary Analysis report includes the special instructions for the list of selected packages.
9. To review the special instructions for the selected UDO package, sign in to the Web Client and run **Work with Software Update Special Instructions** (P96700RW) from the fast path. Alternatively, you can navigate to Software Updates menu (GH9612) and run Work with Software Update Special Instructions (P96700RW).
10. In the Query by Example (QBE) field, enter the ESU Name and click **Find** to filter and review the special instructions.

Importing the UDO Using the Web Client

1. Sign in to EnterpriseOne on the web client.
2. From the Software Updates menu (GH9612), select **Work with Software Update** application (P96470W).
3. On the Work With Software Updates form, enter 22 (User Defined Objects) in the **Software Update Type** field and click **Find** and select the UDO package from the grid.
4. Select the Form menu and click **Import**.
5. On the File Upload dialog box, click **Choose File** and select the UDO package file that you downloaded. Only one UDO package can be imported at a time.
6. Click **Load**. The system imports the file and returns to the **Work With Software Updates** (P96470W) form. The new UDO package appears in the grid.
7. The system also populates the **Software Update Status** pane on the screen which displays a visual of the deployment status, highlighting the current deployment step and the percentage of updates remaining.

   Note: If the Software Update Status window does not appear, select **Software Update Status_History** from the Layout drop-down list.
8. To view objects delivered with this UDO package, click the Row menu and select **Objects**.
9. Click **Close**.

Deploying the UDO Using the Web Client

1. Access the **Work With Software Updates** application from the Software Updates menu (*GH9612*).
2. On the Work With Software Updates form, enter 22 (User Defined Objects) in the **Software Update Type** field and click **Find**.
3. Select the UDO from the grid.
4. Select the Row menu and click **Deploy**.
5. The **Software Update Environment Selection** form is displayed. The **Auto Share** check box is NOT selected by default.

   If you select the Auto Share check box, the system promotes the UDO object(s) to the 'Shared' (08) status after import and deploy.
6. Select the check box corresponding to the environment(s) that you want to deploy the UDO package to.

   Note: For Trial Edition, use *PS920* because *DV920* does not exist.
7. To verify the list of objects that will be applied, click the Row menu and select **Affected Objects**.
8. The **Merge Action** is set to 2 *(Replace)* if UDO object already exists, and the **Merge Action** is set to 1 `(Add)` if this is a new UDO object.
9. Click **OK** to exit.
10. Click **OK** on the **Software Update Environment Selection** form to launch the UDO deployment.
11. The Software Updates Status on the Work With Software Updates form shows the progress. When the UDO deployment is complete, the system displays 100% Complete status in the Deployment Status.
12. Click **Find** on the Work With Software Updates form to refresh the grid columns.
13. Click **Refresh** on the **Software Update Plan History** pane.
14. Click the **View Output** icon in the Grid Column to download the UDO Web Deploy Summary Report.

Validating the UDO Deployment

1. To verify the UDO deployment using Web OMW, run the **Object Management Workbench – Web** application (P98220W).
2. Search for the UDO Project that you deployed and click **Find**. The system displays the deployed objects in the Project Objects tab.
3. Select **Logging** from the Row menu.
4. Click **Find** on the Work With Project Logs form.
5. Click the log data item and view the log detail.

Running the UDO Impact Analysis on the Web Client

Enable Impact Analysis environment tracking from the Work With Software Updates application (P96470W).

1. Click **Configure Analysis** from the Form menu. The **Revise Software Update Impact Analysis Tracking Enablement** form is displayed.
2. Select the tracking environment and click **OK**.
3. On the Work With Software Updates form, select **Advanced** and **Impact Analysis** from the Row menu. The **Work With User Defined Object Impact Analysis** form is displayed.

   Note: If Impact Analysis Tracking is enabled for the environment, the system populates the Impact Analysis data (F96710) during Add and Import, and displays the Impact Analysis option when you select Advanced option from the Row menu.
4. You can also run Impact Analysis from Software Update Environment Selection form before deploying to the target environment. Click **Impact Analysis** from the Row menu.
5. On the Work With User Defined Object Impact Analysis form, click **View Dependencies** from the Row menu. The Work with Project Object Dependencies form is displayed.

   If there is a dependent UDO for the project, it is displayed in the grid.

Resetting Software Update Merge (Control Tables and Table Conversions) Using the Web Client (Release 9.2.9)

Beginning with Tools Release 9.2.9, JD Edwards Update Manager enables you to reset merges that were performed as a part of updates using the web client. You can reset to rerun the merges (Business Data Table Conversions and Control Table Merges) as needed to refresh the data in the target environment.

Resetting Merge for Control Tables Using the Web Client

To reset control table merges:

1. Sign in to EnterpriseOne on the web client.
2. From the Software Updates menu (GH9612), select the **Work with Software Update - Web** application (P96470W).
3. From the grid, select the deployed ESU that you want to reset in an environment.

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4. Select the **Row** menu and click **Deploy**. The **Software Update Environment Selection** form appears.

5. Deselect the **Backup** and **Create OMW Project and Package Assembly** checkboxes that are selected by default.

6. Select the environment and click **Reset Merge** from **Row** menu. The **Software Update Control Table History** form (P96470W) is displayed.

   > **Note:** If the selected ESU is not deployed in the environment you select, the Reset Merge option is unavailable for selection in the Row menu.

7. To change the status of the control tables individually, select a control table record and click **Change Status** from Row menu, to manually update the reset status to 30.

   Alternatively, to reset the status of all the control tables, click **Reset Merge** from the Form menu. The system resets the merge status for all the tables to 30.

8. Click **OK**.

   This initiates the reset of the selected environment(s) and updates the status in the Software Update Detail (F9671) table. It then updates the Table Conversion Scheduler (F98405) to reflect completion, and writes a conversion log record to the Table Conversion History Log (F984052).

9. In the **Software Update Environment Selection** form, click **OK** to deploy. The **Work with Software Updates** form shows the deployment status and displays the corresponding reports in the **Software Updates Plan History** pane.

Resetting Merge for Table Conversions (TCs) Using the Web Client

To reset the merge for TCs:

1. From the Update Manager workbench, select **Package Deployment**.

2. In the **Work With Package Deployment** form, select the package and verify if the package is deployed and the TC is completed.

3. Sign in to EnterpriseOne on the web client.

4. From the Software Updates menu (GH9612), select the **Work with Software Update - Web** application (P96470W).

5. Select the ESU package and click **Deploy** from the Row menu.

6. In the **Software Update Environment Selection** form select the environment from the grid and click **Reset Merge** from **Row** menu.

7. In the **Software Update Control Table History** form (P96470W), to filter the records select **Cnv Type** field in the grid and set the value to 3.

8. To individually update the reset status to 30 for a table, select the table in the grid and click **Change Status** from **Row** menu.

9. To reset the merge status for all the tables click **Reset Merge** from the **Form** menu.

10. Click **Cancel** in the **Software Update Control Table History** form to exit without updating the Software Update Detail table (F9671) for this environment.

11. Click **Cancel** to exit the **Software Update Environment Selection** form without deploying the ESU.

12. Click **Cancel** to exit the **Work with Software Update - Web** application (P96470W).

13. Run the **Work With Package Deployment** program (P9631W).

14. Select the package in the records grid and then click **Add** in the **Enterprise Server** tab.

15. In the **Package Deployment Revision** form, select the Enterprise Server in the **Enterprise Server Selection** pane.

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16. Click **OK**.

17. In the **Work With Package Deployment** form, select the server in the **Enterprise Server** tab and click **Deploy**.

18. After deployment, to verify the TC report, access the **Standard version submitted from Package Deploy** report (R98405W) and the **Table Conversion/Merge Driver** report (R98405) from the **Submitted Job Search** program (P986110B).

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5 Deploying Configurations Using the Web Client (Release 9.2.9)

Overview

Certain types of deliverables are categorized as Configurations.

- Configuration files that you can download from the JD Edwards EnterpriseOne Update Center are:
    - Data Packs
    - EnterpriseOne Samples

- Custom Configurations are created with Configuration Assistant and delivered to the Customer by the Business Partner.

Beginning with Tools Release 9.2.9, Update Manager supports the deployment of multi-platform deliverable (PAR) configuration files using the Web Client.

This section discusses how to:

- Download a Configuration (Data Pack) from the Oracle JD Edwards Update Center.
- Download a Configuration (UN* UDO Bundle) from the Oracle JD Edwards Update Center.
- Import the Configuration using the web client.
- Deploy the Configuration using the web client.
- Validate the Configuration deployment using reports.

> **Note:** *Click here to view an OBE of this feature.*

Downloading a Data Pack Configuration File from the Oracle JD Edwards Update Center

To download a Data Pack configuration file from the Oracle JD Edwards Update Center:

1. Access the Oracle JD Edwards Update Center.
2. In the Search section, set the following criteria:
    a. In the **Type** field, select `Configurations.`
    b. In the **Release** field, select `9.2.`
    c. In the **Platform** field, select `CLIENT.`
3. Enter `DP*` in the **Search for Name** field to further limit the data pack search and click **Search**.
4. Review the search results.
5. Click the download icon for the data pack you want to add to your downloads. The configuration package is added to your Download Basket.

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6. From the Download Basket, download the configuration as a portable archive (.PAR) file.

Downloading a UDO Bundle Configuration File from the Oracle JD Edwards Update Center

To download UDO bundle configuration package from the Oracle JD Edwards Update Center:

1. Access the Oracle JD Edwards Update Center.
2. In the Search section, set the following criteria:
    a. In the **Type** field, select `Cumulative Updates.`
    b. In the Release field, select `9.2.`
    c. In the Platform field, select `CLIENT.`
3. Enter `*UDO*` in the **Search for Name** field to further limit the UDO bundle search and click **Search**.
4. Review the search results.
5. Click the download icon for the UDO Bundle you want to add to your downloads. The configuration package is added to your Download Basket.
6. From the Download Basket, download the configuration as a portable archive (.PAR) file.

Importing the Configuration File Using the Web Client

To import the downloaded configuration file using the web client:

1. Sign in to EnterpriseOne on the web client.
2. From the Software Updates menu (GH9612), select **Work with Software Update** application (P96470W).
3. On the Work With Software Updates form, enter `60` (Configurations) in the **Software Update Type** field and click **Find**.
4. Select the configuration package from the grid.
5. Select the Form menu and click **Import**.
6. On the File Upload dialog box, click **Choose File** and select the configuration package file that you downloaded. You can only import one configuration package at a time.
7. Click **Load**. The system imports the file and returns to the **Work With Software Updates** (P96470W) form. The new configuration package appears in the grid.
8. The system also populates the **Software Update Status** pane on the screen which displays a visual of the deployment status, highlighting the current deployment step and the percentage of updates remaining.

    Note: If the Software Update Status window does not appear, select Software Update Status_History from the Layout drop-down list.

9. To view objects delivered with this configuration package, click the **Row** menu and select **Objects**.
10. Click **Close**.

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Deploying the Configuration File Using the Web Client

To deploy the imported configuration file using the web client:

1. Access the **Work With Software Updates** application from the Software Updates menu (GH9612).
2. On the Work With Software Updates form, enter `60` (Configurations) in the **Software Update Type** field and click **Find**.
3. Select the configuration file from the grid.
4. Select the Row menu and click Deploy.
5. The Software Update Environment Selection form is displayed. Select the **Backup** check box if required. It is not selected by default.
6. Select the checkbox corresponding to the environment(s) that you want to deploy the configuration package to.
7. To verify the list of objects that will be applied, click the Row menu and select **Affected Objects**.
8. Click **Close** to exit.
9. Click **OK** on the **Software Update Environment Selection** form to launch the deployment.
10. Click **OK** in Warning dialog box.

    > **Note:** The warning message is displayed only when you schedule Load Configuration Data.

11. The Software Updates Status on the **Work With Software Updates** form shows the progress. When the deployment is complete, the system displays 100% complete status in the Deployment Status pane.
12. Click **Find** on the Work With Software Updates form to refresh the grid columns.
13. Click **Refresh** in the **Software Update Plan History** pane.
14. Click the View Output icon in the grid column to download the Web Deploy Summary report.

Validating the Configuration Deployment Using the Web Client

You can validate the deployment of the configuration package using the following steps.

Verify Backup Project PAR File

To verify if the backup project PAR file is generated in the F96700R table, run the **Software Update File Repository** program (P96700R). Search for the configuration package deployed and verify that the corresponding backup file is generated.

For example, if the deployed configuration package is `UN7_UDO_60_99.par` then a backup file `PRJ_CFG_UN7_UDO_UDO_DV920_BAK_60_99.par` is generated.

Verify Objects Installed in the Configuration

To verify the objects installed from configuration package, access the **Object Management Workbench - Web** program (P98220W). Enter the configuration package name with * (example, `*UN7_UDO*`) in the **Project QBE** field. The system displays the objects installed from the configuration, in the lower grid of the form.

> **Note:**
>   1. To share UDO objects (if any) in the configuration package, from the lower grid, click **Share** from **More Row Actions**. This option is only for Data Pack configuration packages.

Validate the Configuration Deployoment

After the deployment of the configuration using the web client, the system generates the **Deploy Configuration on Web** (R96701C) and **Report to Load Configuration Data** (R98403WC) reports.

On completion of the deployment process, you can view the list of generated reports in the CafeOne window (**Software Update Plan History**) of the **Work With Software Updates** form. Click the View Output icons in the Software Update Plan History section to view the corresponding reports.

The Deploy Configuration on Web (R96701C) report summarizes the detailed status and updated objects in a PDF file.

The Report to Load Configuration Data (R98403WC) report provides a summarized report of load XML Data for web deployment.

Enabling UBE Debug Log for R96701C Using P98617

For information on defining report logging for the Deploy Configuration on Web (R96701C) UBE, see *Defining Default Logging Levels for Jobs (Release 9.2.6)* in the *JD Edwards EnterpriseOne Tools Administration Guide*.

6 Using Change Assistant

Understanding Change Assistant

The JD Edwards EnterpriseOne and World Change Assistant is a standalone Java application that helps you manage, download, and deploy JD Edwards EnterpriseOne packages. Change Assistant provides a single point of entry to facilitate administration of software updates and fixes. You can download Change Assistant from the Oracle JD Edwards EnterpriseOne Update Center by clicking the Download the Change Assistant Application link.

You can access the Update Center by using the following navigation from My Oracle Support:

My Oracle Support | Patches &Updates tab | JD Edwards

Installing the Java Runtime Engine

Change Assistant requires a certified JRE. If you do not have an appropriate version of JRE installed, you will not be able to use Change Assistant. You can download and install the Java Runtime Engine by navigating to the Java website. The Change Assistant Launch page provides the link to launch the application via Java WebStart.

> **Note:** See the Oracle Technology Network (OTN) for certified versions of JRE: `http://www.oracle.com/technetwork/java/javase/overview/index.html`

If you have problems after installing the JRE, Oracle recommends that you manually remove all existing JREs and start over.

Installing Change Assistant

You download Change Assistant from the Update Center.

When the installation is finished, a Preference wizard opens, prompting you for preferences for setting up Change Assistant. If you already have Change Assistant installed, or if the Preference wizard does not appear when installing Change Assistant, you can launch Change Assistant from your desktop. You can change or set up your preferences by selecting Preferences from the Edit menu.

The Preference wizard provides an option for you to choose whether the Preference wizard always appears upon startup of the tool. If you choose to have the Preference wizard always appear, you are prompted for your Update Center password each time you launch Change Assistant.

To install Change Assistant:

1. Within Update Center, select Electronic Software Updates from the News and Links pane on the left.
2. Click the Download the Change Assistant Application link on the Update Center, Electronic Software Updates web page.

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The JD Edwards EnterpriseOne and World Change Assistant page opens providing information about Change Assistant features.

3. Click the "here" link in Step 2, under Installing Change Assistant.

After Change Assistant installs, the Preference wizard opens prompting you for preference information.

4. For Update Center Authentication, enter your Update Center access information in these fields:

Field	Description
User ID	Enter your Update Center user ID.
Password	Enter your password.
User Name	Enter a user name.
Email	Enter your email address.
Phone	Enter your phone number.

5. If you want to disable the Update Center connection, select the Disable Update Center connection check box.

> **CAUTION:** If you select this check box, you will not be able to search for and download ESUs.

6. If you want to be prompted for your password each time Change Assistant starts, select the Always Prompt at Startup? option.

This option is on all pages of the Preference wizard. If you change your selection on a future page, the change is reflected on all pages.

7. Click Next to open the next page of the Preference wizard, which prompts you for connection information.

8. The system provides default values for these Update Center Connection fields:

   ○ Timeout
   ○ Number of Retries

Oracle recommends that you use the default values.

9. If you access the Update Center through a proxy server that requires authentication, enter this information:

   ○ User ID
   ○ Password
   ○ Domain

10. Click Next to open the next page of the Preference wizard, which prompts you for a directory location for downloads.

11. Enter the path to the directory where you want to store downloaded updates.

   For example, C:\Change Assistant\Downloads.

   This is the root folder for packages that are downloaded from the Update Center. Typically, this is a folder that is shared by all your Update Center users to avoid downloading the same packages multiple times. Packages can be organized into additional folders under this parent folder.

12. Select the Include Dependencies option to automatically include dependent packages in download and deployment requests.

13. Select Show News and Links at Startup to automatically display this information each time you launch Change Assistant.

   If you select this option, the Show News and Links page appears each time you launch Change Assistant. If you do not select this option, Change Assistant opens with the tree structure. The News and Links page enables you to view content that is downloaded from the Update Center, such as breaking news, planner information, or JD Edwards EnterpriseOne Certifications (MTRs) information.

14. Click Next to open the next page of the Preference wizard, which prompts you for Logging information.

15. Enter the directory for the activity Log files.

   For example, C:\Change Assistant\Logs.

   Deployment activity for downloads is kept in the log file directory. This includes information about download times and deployment times. This location is also used to hold information that is captured during the deployment of downloaded packages. You create the download log by searching your local downloads or by retrieving download audit information from the Update Center.

16. Select the Create Download Log from current downloads option if you want the system to automatically generate logs based on downloads in the download folder.

17. Select the Create Download Log from download audit history option if you want to create logs based on the Update Center audit history.

18. (Release 9.2.6) Click Next to open the next page of the Preference wizard, which provides AIS Connection information.

19. For AIS authorization, you can select the authorization you prefer. You can select the User and Password authorization type or the Basic authorization type. Enter your authorization information in these fields:

Field	Description
User ID	Enter a user ID.
Password	Enter your password.
Environment	Enter the enivironment required by the AIS Server. Leave the field blank if the information is not required.
Role	Enter the user role required by the AIS Server. Leave the field blank if the information is not required.
URL	Enter the URL to the AIS Server.

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You can use the AIS connection to enable the Analyze Packages option to get a personalized comprehensive analysis of the selected packages that use EnterpriseOne data. The summary analysis report connects to the AIS Server and the analysis information is included in the reports generated. You can use this information to evaluate the changes that can occur based on the objects. You can also verify if the objects have been previously deployed.

> **Note:** For more information on authorization types see, *Understanding AIS Authentication* in the JD Edwards EnterpriseOne Tools Application Interface Services Server Reference Guide.

20. Click Next to open the next page of the Preference wizard, which provides licensing information.
21. Select the Always Accept option to hide the license agreement during the download process.
22. Click Finish.

    Change Assistant is now installed on your system with a shortcut available on your desktop.

Viewing BUG Details

The View BUG Details option appears within the Change Assistant tree structure. When you select View BUG Details, the BUG Details tab displays in the right pane. Enter the BUG you want to review and click on the Show Details button to retrieve the BUG information.

First In (Release 9.2.6)

The First In option appears within the View Bug Details section within the Change Assistant tree structure. Enter the BUG number and click First In to identify in which package the bug first appeared.

You can view which software update the BUG first appeared in. You can also view in a chronological order the list of packages in which the bug has appeared.

Searching for Software Packages

This section provides an overview of package searches and discusses how to:

- Perform a search.
- Analyze packages.
- Run all queries.
- Save search criteria for future use.

Understanding Package Searches

Package searches can be performed in various ways. You can use preexisting queries to find packages, or you can create your own query and save it for future use. The preexisting queries are organized by type, release, and business purpose within the Search for Packages tree structure under the JD Edwards folder.

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Queries in the JD Edwards folder are updated each time that you launch Change Assistant.

When you choose one of the predefined queries, the system populates the fields in the Search pane. You can update these fields as needed or create your own query by populating these fields manually.

If you customize a query, you can save it for future use within the My Queries folder. Queries within the My Queries folder are persistent and do not get overwritten. You can configure the predefined queries with date ranges or other filters and save these searches in the My Queries folder or any subfolder therein.

You have the ability to run all queries inside a query folder. The queries will be run in the order that they appear in the tree, the results will be displayed on a single tab, and any duplications will be excluded.

You can customize any query folder that you have created under the My Queries folder using the Folder Options dialog. This enables you to designate a folder as an aggregate folder. An aggregate folder enables you to arrange the child queries in a particular order by simply dragging them to the desired location, while a regular query folder sorts the queries alphabetically. You can also use the Folder Options dialog to disable searching at the folder level.

> **Note:** When you use the Run All Queries option under an aggregate subfolder of JD Edwards, the results tab only allows you to download or download and deploy *all* of the packages in the order they appear in the grid.

When you perform a search, the results are displayed on the right side of the form. Only the first twenty matches are displayed, and the results count is displayed above the grid. You can use the Page at a time button or the All Results button to continue fetching the results. Each search that you perform creates a new results tab.

Performing a Search

Access Change Assistant.

1. Expand the Search for Packages node on the tree.
2. If you want to create a new query, use any of these fields on the Search pane to define your query:

Field	Value
Type	Specify the type of update you want to search for.
Release	Specify the release for the selected updated type.
Platform	Specify the target platform of the package.
Defect Category	Specify the defect category of a BUG in the package. Valid values are: ◦ **All** ◦ **Memory** ◦ **Performance**

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Field	Value
Name	Enter the name of the package. Valid values include a single name with a wildcard (*) and a comma-separated list of exact names.
BUG Number	Enter the name of a BUG contained in the package or a comma-separated list of BUGs.
Object	Enter the name of an object contained in the package. Valid values include a single name with a wildcard (*) and a comma-separated list of exact names.
System Code	Enter a system code for a BUG or an object contained within the package. You can also enter a comma-separated list of exact names.
Description	Enter a description for the package or for a BUG or an object contained within the package. You can enter a string including wildcards (*).
Search by Dates	Specify whether you want to search over a range of dates or for a duration of time. ○ Duration: Specify how many days, weeks, or months you would like to include in the search. ○ Range: Specify a From Date and Through Date

3. If you want to use an Oracle JD Edwards predefined query, expand the JD Edwards folder to view a predefined set of queries and select a search.
4. Update the search criteria as needed to search by type, names, or dates.
5. Click the search button above the search criteria to run the search against the Update Center.
6. View the search results on the appropriate search tab on the right side of the screen.
7. To view details for a specific package, select the package.

The Package Details pane displays detailed information for that package, such as included BUGs, objects, and dependency information.

8. View the package details below the search results by clicking the tab that corresponds to the information that you want to view.

Select any of these tabs to view more information:

Tab Title	Description
BUGs	Displays a list of all of the BUGs included in the package. You can double-click on any of the BUGs to see the BUG details. **First In:**(Release 9.2.6) You can select the First In option to identify which package the bug first appeared in.
Objects	Displays a list of all of the objects included in the package.

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Tab Title	Description
Objects by BUG	Lists the objects included in the package as well as the BUG with which they are associated. **First In:**(Release 9.2.6) You can select the First In option to identify which package the bug first appeared in.
Net Change	Lists the packages that are superseded by the selected package. Select the Compare button to see a comparison of the selected package and any of the superseded packages.
Dependencies	Lists any other packages upon which the selected package is dependent. These packages should be installed before the selected package.

Check Sum	When you select this tab, the system computes the checksum. This can be used after downloading a package in order to verify its integrity. The following two checksum algorithms are used:
	
	   ○ MD5
	   ○ SHA-1

9. To close a specific results tab, right-click it and select Close from the pop-up menu.
10. Select Close All Results to close all results tabs.

Analyzing Packages

After finding a package, you can perform a net change analysis before you download the package.

To analyze packages:

1. On the search results tab, select the packages that you want to analyze and click the Analyze button.
2. If you have selected more than one package and you choose the Analyze with Downloads option from the Analyze drop-down list box, the selected packages are compared to the superseded list. Next, the most current download found is used to perform the net change analysis by comparing the most current download to previously downloaded packages.
3. If you select the Summarize All option from the Analyze drop-down list box, Change Assistant will summarize the selected packages and will not perform a net change comparison.
4. When the analysis finishes processes, a report appears. Review the report.

    Any special instructions selected in the Special Instructions option are included in the report.

    (Release 9.2.6) You can use the AIS connection to enable the Anaylze Packages option to get a comprehensive impact analysis of all the packages that use EnterpriseOne data. The summary analysis report connects to the AIS Server and the analysis information is included in the report generated. You can use this information to evaluate the changes that can occur based on the objects.

    You can apply any of the following options for package analysis:
      ○ All Packages

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- Changed Objects
- New BUGs
- New Objects
- All BUGs
- All Objects
- Special Instructions
- Include BUG and Object Relationships
- (Release 9.2.6) Include Dependent Packages.

You can generate the comprehensive impact analysis report in an HTML, an XML, or a Comma Separated Values (CSV) format. If you select the CSV format then the report is exported in the form of a spreadsheet.

The summary analysis report provides the following information:
- A list of selected packages.
- The list of changed objects and their details, for example, the date when the object was changed, when the object was last deployed, and in which environment. The report also provides information about the object and its pathcode. The report also helps you identify if an object has been copied and provides information regarding the base-object from which the object was copied.
- A list of new bugs. You can use this information to compare the new bugs and their information with the software updates history to identify the bugs which have been previously deployed. If a bug is not a part of any package, then it is considered as a new bug which needs to be assessed. By using the Include BUG and Object Relationships option, you can see the objects with which a bug is associated.
- All the bugs that are related to the packages. The report also provides information about whether the bugs have been previously deployed.
- A list of all the objects related to the packages. You can verify if the objects have been previously deployed, and view information with which the packages were deployed.

Note: The Analyze option is available when you are connected to the Update Center or through the AIS connection using the EnterpriseOne orchestrations. You can also enable the Analyze Packages option from Working with Packages application and Working with Batches application.

Summarizing Packages

After finding a package, you can summarize the package before you download the package. The Summarize Packages option enables you to group all the packages by the option you select in a separate list.

To summarize packages:

1. On the Search Results tab, select the packages that you want to summarize and click the Summarize Packages button.
2. If you select the Summarize option from the drop-down list box, Change Assistant summarizes the selected packages.
3. Select one of the following options to specify the information type by which you want to summarize the packages:
   - BUGs

     The First In option enables you to identify in which package or ESU the bug first appeared.

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- o Objects

- o Objects by BUG

  The First In option enables you to identify in which package or ESU the bug first appeared.

  - o Include Dependent Packages.

4. You can right-click the user interface grid to export or view the data in a print preview mode.
5. Click Ok.
6. Rick-click the user interface grid and select Export All or Print Preview from the context menu to view the summarized package information in an Excel or a PDF format, respectively.

Note: You can also enable the Summarize Packages option from Working with Packages application and Working with Batches application.

Special Instructions (Release 9.2.6)

You can view the special instructions before you download a package.

To view the special instructions:

1. On the Search Results tab, select the packages for which you want to view the special instructions and click the Special Instructions button.
2. You can view the following options as special instructions:
   - o All Packages

   - o All BUGs

   - o Special Instructions

   - o (Release 9.2.6) Include Dependent Packages

3. Click Ok. A report is generated with all the selected special instructions. Review the report.

You can generate the report in an HTML, an XML, or a Comma Separated Values (CSV) format. If you select the CSV format then the report is exported in the form of a spreadsheet.

If you enable the Special Instructions option while being connected to the AIS Server, the completed tasks are displayed in the report in the form of strikethrough text.

You can access the Work with Software Update Special Instructions application (P96700RW) from the Software Updates menu on EnterpriseOne. Access the P96700RW application to review and set the status of each of the special instructions which have been listed when the package is analyzed using Change Assistant. The P96700RW application also enables you to mark the completed instructions from the list of instructions.

The summary analysis report shows you the special instructions that have already been completed before the current pacakage was analyzed.

Note: You can also enable the Special Instructions option from Working with Packages application and Working with Batches application.

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Running All Queries

To run all queries:

1. Select the folder for which you want to run the queries.

   > **Note:** If the Disable Folder Search check box has been selected within the Query Folder Options, you will not be able to search at the folder level.

2. Right-click and select Run All Queries to run all the queries in the selected folder and subfolders.

   Change Assistant will display the combined results of all the included queries.

Saving Search Criteria for Future Use

To save search criteria for future use:

1. Select one of the existing queries under the JD Edwards folder.
2. Configure the query as desired.
3. Click the Save Query button.
4. Specify the folder to save the query in within the My Queries folder.
5. Enter a name for the query.
6. Click the Save the Query button.

Working with Packages

This section provides an overview of package downloads and discusses how to:

- Change the downloads directory.
- Download packages.
- Extract packages.
- Copy packages.
- Perform an impact analysis.
- Use Visual Compare for UDC descriptions and glossaries.
- Delete packages.
- Deploy packages.

Understanding Package Downloads

Once you have searched for your packages, the next step is to download the packages. Downloading the packages makes them available to work with on your machine. For example, you can extract, transfer, copy, or deploy packages once they have been downloaded.

Your download folder structure appears in Change Assistant under the Work with Packages node. You can organize packages into subfolders based on release, package type, and platform. This allows for easy browsing, tracking, and management of packages. You could also further categorize the packages based on when they were downloaded.

To view your downloaded packages, select a downloads folder in the tree structure on the left side. The display on the right changes to display the packages contained in that folder in the Work with Packages grid. By default, only the packages that are immediate children of the folder selected in the tree are displayed in the grid. The Descendants option on the View menu allows you to display the contents of the selected folder and all the subfolders.

Clicking on the column in the grid header allows you to sort rows in ascending and descending order based on that column. You can also sort multiple columns by holding the Control key down while clicking on one or more column headers. Selected packages can be extracted, deployed, transferred to a different machine, or deleted, using the tool bar options.

Changing the Downloads Directory

To change the downloads directory:

1. Select File, Open Downloads Directory.
2. Enter the new downloads directory and click OK.

   Note: The downloads directory must have read/write access. To access a PAR file on a CD or from the Oracle Software Delivery Cloud portal, copy the PAR file to a folder within the current downloads directory, or to a folder with read/write access. Then, change the downloads directory to the folder where you copied the PAR file.

3. To quickly switch back to previously used directories, select File, Recent Home Directories.

Downloading Packages

Packages in the Search Results grid are downloaded from the Update Center. The checked boxes in the first column of the grid specify those updates that have not been downloaded. This status is determined by local information that is taken from the download log. You can select which packages to download by manually checking or unchecking the check boxes in the first column. You can download multiple packages simultaneously by selecting more than one package in the Search Results grid.

To download packages:

1. Within the Search Results grid, select the packages you would like to download by placing a check mark in the first column.
2. Open the Download drop-down list box by selecting the down arrow next to the Download button.
3. To download the selected packages, select either the Download To option or the Download and Deploy To option from the drop-down list box.

   The Download and Deploy To option provides a way to download and deploy all selected packages in one step.

4. Select your download folder from the list of previously chosen folders or select a new folder to which to download your packages.

> **Note:** During the download process, you have the ability to pause, resume, and cancel the download using the appropriate buttons in the bottom-right corner of the form. You can also view the progress of the download in the status bar at the bottom of the form.

5. If you selected to download and deploy in one step, you are prompted to sign into JD Edwards EnterpriseOne and then must enter your specific deployment information before starting the download.

   For example, deploying Electronic Software Update (ESU) packages from the JD Edwards EnterpriseOne deployment server requires the name of the target environment and other deployment options. An additional input dialog is displayed to prompt for these options.

   > **Note:** You must be on the deployment server in order to deploy the packages.

   See *Deploying Packages*.
6. View your downloaded packages by selecting Work with Packages and then Downloads from the tree structure.
7. If you think there may have been problems during the download process, you can perform a checksum validation to ensure the integrity of the downloaded package by selecting the Check Sum tab within the Package Details pane.

   When you select this tab, the system uses 2 algorithms, MD5 and SHA-1, to calculate checksum values for the downloaded package and compares these values to the original package. A green check mark appears next to each value if the checksum value for the downloaded package and the original package are the same. If there is a problem with the integrity of the package, you will see a red universal no symbol over a check mark next to the value.

Extracting Packages

If the downloaded package is a PAR file, you need to extract the contents of the package.

1. Select the Work with Packages node from the tree structure.
2. Select the Downloads node, and your downloaded packages appear on the Work with Packages tab.
3. Select the package to download and click the Extract button.

   When you click the Extract button, the contents of the package appear in a new Extract window in a tree structure or in a tabular form.
4. In the Extract window, select one or more files or folders to be extracted by selecting the corresponding check box.

   Selecting a folder automatically selects all of its contents.
5. To examine a file before extracting it, right-click the tree or grid and select Open/Launch.

Copying Packages

To copy packages:

1. On the Work with Packages tab, select the package that you want to copy and click the Copy button.
2. Enter the target directory on the Select the Target Location form and click OK.

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Note: The target directory must allow write permission, and cannot be the same as the source directory.

Performing an Impact Analysis

To perform an Impact Analysis:

1. On the Work with Packages tab, select the packages for which you would like to perform an impact analysis.
2. Click the Impact Analysis button and the system will verify the selected packages as ESUs, extract the impact analysis document from the package deliverable, and import the impact analysis document into JD Edwards EnterpriseOne.
3. If you want to import impact analysis documents from the deployment server, select Impact Analysis from Deployment Server directory from the Impact Analysis drop-down list box.
4. Use the Impact Analysis Tool to review the changes for your selected software updates.

Note: The Impact Analysis option is only available when JD Edwards EnterpriseOne is installed.

Using Visual Compare for UDC Descriptions and Glossaries

To use Visual Compare for UDC Descriptions and Glossaries:

1. On the Work with Packages tab, select the packages for which you would like to run Visual Compare.
2. On the Impact Analysis drop-down list box, select Visual Compare for UDC Descriptions and Glossary.
3. If you want to import impact analysis documents from the deployment server, select Visual Compare for UDC Descriptions and Glossary from Deployment Server directory from the Impact Analysis drop-down list box.

   Change Assistant verifies that the selected packages are ESUs, extracts the automated special instructions document from the package deliverable, and imports only documents containing User Defined Codes or Glossaries into JD Edwards EnterpriseOne.
4. Use the Visual Compare for UDC Descriptions and Glossary Tool to review the changes and accept the changes for your target environment.

Note: The Visual Compare for UDC Descriptions and Glossary option is only available when JD Edwards EnterpriseOne is installed.

Deleting Packages

To delete packages:

1. Click the Delete button.
2. Select Continue in the Delete Confirmation dialog box to delete the selected packages and the corresponding temporary folders from the local machine.

Note: This process only deletes the file from your machine and does not affect deployment status. If the package was deployed, it will not be uninstalled.

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Deploying Packages

Before deploying a package, you should check whether the prerequisites or dependencies for the package have been deployed. This information is displayed on the Dependencies tab.

When you click the Deploy button, the activity log is checked to determine whether any of the selected packages have been superseded. If so, a list of these packages is displayed. Also, the log is checked to determine whether all prerequisites for the selected packages have been deployed. If not, a list of these dependencies is displayed and you can continue or cancel deployment.

To deploy packages:

1. Select Deploy.
2. From the Deploy drop-down list menu, select one of these two options:
    - Deploy

      Select Deploy to search for a previous batch for the current object at an "in process" status. The system will restart that deployment where it left off or if it cannot find any batches with an "in process" status, it will start a new batch. This is typically used in an Oracle Business Accelerator (OBA) where there is a question and answer session that may require input from multiple sessions, but the "logical" session remains intact.
    - New Batch Deploy

      Select New Batch Deploy to start deployment of a new batch.
3. Select Run All to deploy all of the packages.
4. If multiple packages are selected, a new window is launched and the packages are deployed as an aggregate.
5. If a single package is selected and if the package is suitable for deployment, one of the following processes will occur, depending on the type of package that is selected:
    - If the package is a documentation package, the documentation link is displayed in a new documentation window, and clicking the link launches the associated application.

      If the link points to an HTML page that resides inside the package itself, it is directly displayed in the window.
    - If the package only contains some files that need to be extracted to the disk, the extract window is displayed.
    - If the package is a PAR file that contains some deployment tasks or is an EXE file, a new window is displayed that enables you to view the documentation for these tasks and run them.

      Configurations and packages with JD Edwards EnterpriseOne tables or objects are validated for their release level. If the source and target release do not match, a warning is displayed. If you choose to ignore this warning, you must give careful consideration to changed table formats, object dependencies, and so forth.

      During the deployment of configurations that contain versions, the Versions tab appears. Use this tab to change the version prefix. Enter the From Prefix and the To Prefix values in the grid.

      > **Note:** The new prefix string must be the same length as the old prefix.

    - If the package is an ESU, a new window is displayed that prompts you to select the target deployment environments and the following deployment options:

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Batch Deployment Option	Description
Backup	Select the backup check box to create a backup of object specifications included in the updates. Backups are used with the compare/merge tools to aid the retrofitting process and to examine changes made by the update. Backup is selected by default.
Environment	Select the environments to which you want to deploy the update. It is recommended to apply updates to the Pristine and Development environments using Change Assistant. After retrofitting custom objects, you can transfer the objects to the Prototype and Production environments using OMW.
Notes	Use this tab to add any runtime notes that you would like displayed on activity reports and during restart of a deployment.
Skip Spec Merge	Select this option if you would like to skip the spec merge for objects for a particular environment.
Skip OMW and Package Build Data	Select this option to skip the creation of OMW projects and package build definitions.
Summary	Select this option to deploy the group automatically with minimal status information. If you do not select this option, you step through each task of the deployment with full status. The manual mode requires clicking the Run or Run All button before starting the deployment.
Unattended	Select this option to deploy a group of updates in a single process. If you do not select this option, you step through each task of the deployment manually (attended mode). The unattended mode requires no further input after clicking the OK button. The status of each update displays as the application runs.

Working with Batches

This section provides an overview of batches and discusses how to work with batch details.

Understanding Batches

A batch is created for each download, deployment, and delete action taken. All packages selected for the initial action are preserved in a single link to simplify future tasks with these same packages. You can research all packages that were downloaded in a batch by right-clicking the batch record. You can also use the Deploy button to deploy all packages that were previously downloaded in a batch.

You can use the following options when you are working with a batch:

- Deploy

  To deploy all the packages in the selected batch, click Deploy. If the batch contains one or more ESUs, you will be prompted to sign into JD Edwards EnterpriseOne.

- Export

  This feature is useful when you want to download packages to one machine and deploy them from another machine. For example, if your deployment server does not have access to the Update Center, you can download packages to a client and then export the packages to a Jar file. This file can then be copied to the deployment server and imported using the Import option.

- Import

  This option enables you to import packages to a machine from a jar file that was created using the Export option. The application prompts you to select the jar file from which you want to import the packages and to choose the directory to which you want to import the packages.

- New

  You can create a custom batch by clicking the New button on the Work with Batches grid. This enables you to group the previously downloaded packages together for the purpose of deployment or exporting.

- Delete

  Use this option to remove any batches that you do not need. This option removes only the batch information, not the packages themselves.

- Batch Summary

  This option generates a summary report of all the actions that were performed on the highlighted batch. The report is displayed in the default browser.

Working with Batch Details

To work with batch details:

1. Select Work with Batches in the tree structure.

   A list of batches will appear in the Batches pane.
2. Select the batch that you want to work with.

   A list of packages included in that batch will appear in the Batch Details pane.
3. To add a package to the batch, select Add Package.
4. To remove a package from the batch, select Remove Package.
5. To view more information about one of the packages, select the package to highlight it, and select Package Summary.
6. To view a history of actions that were performed on the batch, select the Batch Actions tab.

   You can also restart deployment from the Batch Actions tab by clicking the Restart Deployment button.

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Deploying UDOs using the Change Assistant (Release 9.2 Update 2)

Beginning with 4.0.0.4 version, the Change Assistant supports the deployment of User Defined Object Packages and provides a Deployment Summary report after a successful deployment.

To download and deploy the User Defined Object Packages from the Change Assistant:

1. In the Change Assistant, open Search for Packages in the tree structure.
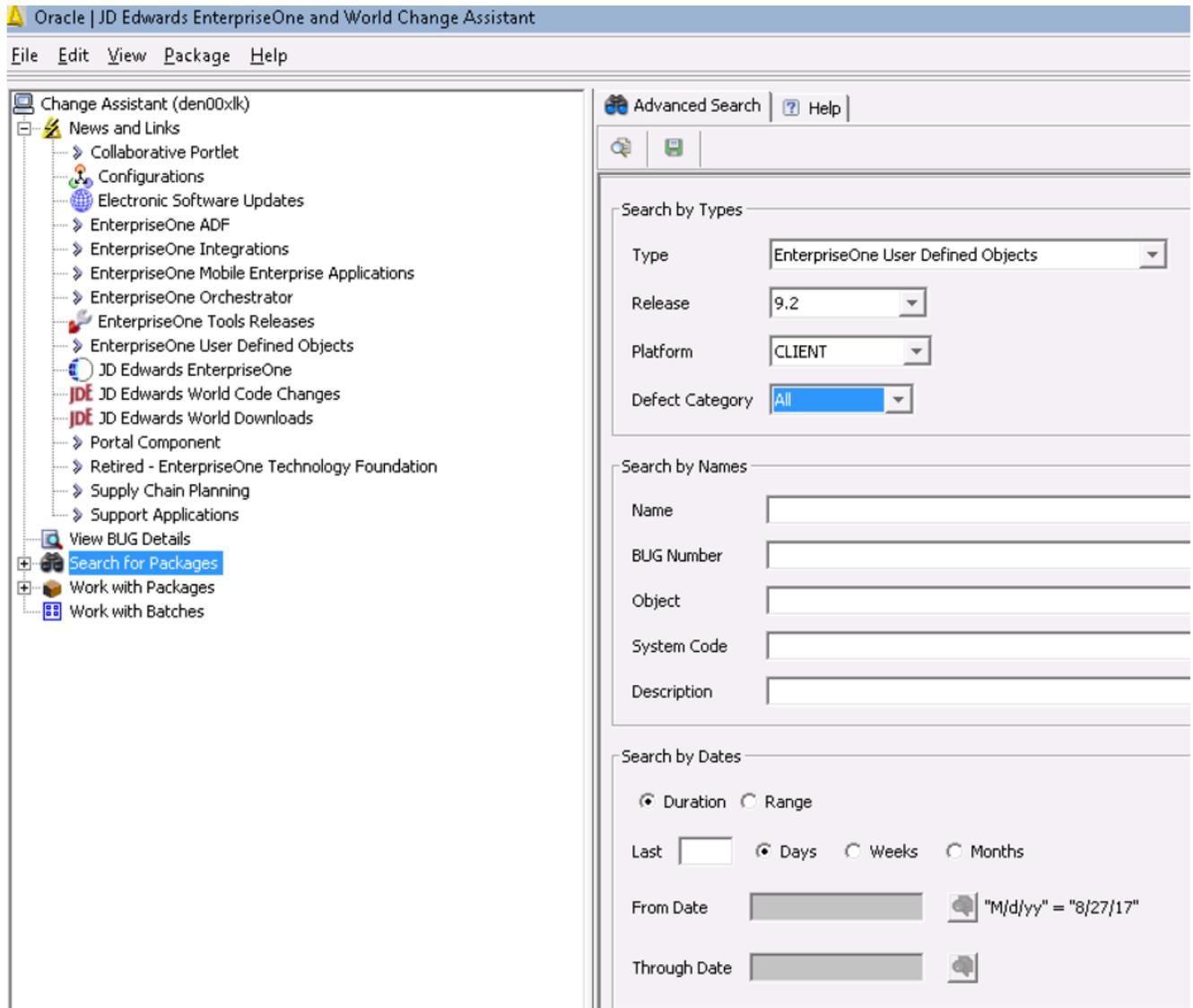
2. In the Advanced Search tab, select the Type as EnterpriseOne User Defined Objects, the Release Number as 9.2, and the Platform as CLIENT.

    Click the Search icon.
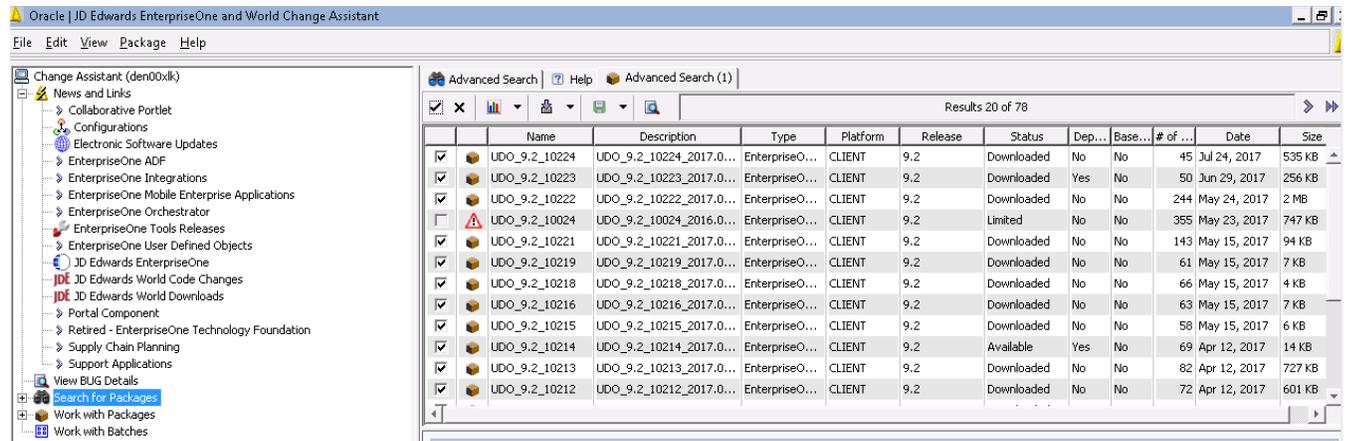
3. Select the required User Defined Object Packages you want to download and deploy. You can select single or multiple packages.

4. Click the Download icon and then select Download To and Deploy Option, and then select the required folder as shown in the following example.

> **Note:** You can select the Download To option to download the packages to the selected directory. You can navigate to the Download directory under Work with Packages in the Change Assistant tree structure, and then deploy the downloaded packages.

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5. Enter the required credentials in the JDEPLAN environment window.

6. Select the Environment in the Environment Selection window, and then click OK.

The Change Assistant Deployment Summary window displays the summary of the UDOs deployment as shown in the following examples.

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7. The User Defined Object Summary Report is displayed after the deployment is successful.

   Click the required User Defined Object Package name to see the detailed report.

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Advanced Search (Aug 27, 2017 10:57:10 PM) Summary

Batch created on Download and Deploy

Batch Action		Status
Download		Completed
Deploy		Completed
Unattended	true	
Backup	false	
Environment	DV920	
UDO_9.2_10224	Deployed To Selected Environment(s)	
UDO_9.2_10222	Deployed To Selected Environment(s)	
UDO_9.2_10221	Deployed To Selected Environment(s)	
UDO_9.2_10219	Deployed To Selected Environment(s)	
UDO_9.2_10218	Deployed To Selected Environment(s)	
UDO_9.2_10216	Deployed To Selected Environment(s)	
UDO_9.2_10215	Deployed To Selected Environment(s)	

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Change Assistant Deployment Summary

Advanced Search (Aug 27, 2017 10:57:10 PM)

- ✓ **UDO_9.2_10224** - Succeeded
- ✓ **UDO_9.2_10222** - Succeeded
- ✓ **UDO_9.2_10221** - Succeeded
- ✓ **UDO_9.2_10219** - Succeeded
- ✓ **UDO_9.2_10218** - Succeeded
- ✓ **UDO_9.2_10216** - Succeeded
- ✓ **UDO_9.2_10215** - Succeeded

Show Details   Start   Pause   Close

Package	Type			B)	Build Date
UDO_9.2_10224	22 (EnterpriseOne User Defined Objec				Jul 24, 2017 12:00:00 AM
UDO_9.2_10222	22 (EnterpriseOne User Defined Objec				May 24, 2017 12:00:00 AM
UDO_9.2_10221	22 (EnterpriseOne User Defined Objec				May 15, 2017 12:00:00 AM
UDO_9.2_10219	22 (EnterpriseOne User Defined Objec				May 15, 2017 12:00:00 AM
UDO_9.2_10218	22 (EnterpriseOne User Defined Objects)	99 (CLIENT)	E920	4	May 15, 2017 12:00:00 AM
UDO_9.2_10216	22 (EnterpriseOne User Defined Objects)	99 (CLIENT)	E920	7	May 15, 2017 12:00:00 AM
UDO_9.2_10215	22 (EnterpriseOne User Defined Objects)	99 (CLIENT)	E920	6	May 15, 2017 12:00:00 AM

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In the User Defined Objects Summary report, the Customized UDOs tab displays the UDOs modified by the customer, and the Deployed UDOs tab displays the UDOs that are a part of the deployed packages.

UDO_9.2_10222 Summary

Definition Customized UDOs Deployed UDOs Report(s) Package Action Status History Task Activity Package Group Notes

Definition	Description
Name	UDO_9.2_10222
Description	UDO_9.2_10222_2017.05.24
Type	22 , EnterpriseOne User Defined Objects
Platform	99 , CLIENT
Release	E920 , 9.2
Size	3021KB
Date	May 24, 2017 12:00:00 AM
Location	C:\Temp\Satish\UDO_92_10222.zip

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Customized UDOs

UDO Name	UDO Type	Description	Date Modified	Modified by User	Modified in PathCode	Logged in User	Merge Action

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Deployed UDOs

UDO Name	Description	UDO Type	Logged in User	Deployed PathCode	Post-Deployment Status	Merge Action
QRY31B99A_1701220001JDE	Spray Operations	QUERY	JDE	DV920	Pending Promote	REPLACED
OVW40G110A_1611280009JDE	Paid Advances	WATCHLIST	JDE	DV920	Pending Promote	REPLACED
E1P_1701270007JDE	Additive Operations P31B99 - Operation Additives Inquiry	E1PAGE	JDE	DV920	Pending Promote	REPLACED
QRY40G210A_1611280007JDE	Receipts with Payment Complete	QUERY	JDE	DV920	Pending Promote	REPLACED
QRY40G200_1609090065JDE	ContractedVarietySupplierDemo	QUERY	JDE	DV920	Pending Promote	REPLACED
OVW31B94A_1701310003JDE	Open Operations	WATCHLIST	JDE	DV920	Pending Promote	REPLACED
OVW31B94A_1701040013JDE	Open Crush	WATCHLIST	JDE	DV920	Pending Promote	REPLACED
QRY31B94A_1512180001JDE	Winery	QUERY	JDE	DV920	Pending Promote	REPLACED
OVW40G03A_1612090002JDE	Recently Planted	WATCHLIST	JDE	DV920	Pending Promote	REPLACED
QRY40G03A_1612090002JDE	Doubtful Blocks	QUERY	JDE	DV920	Pending Promote	REPLACED
E1P_1612010003JDE	P40G032 - Remaining Quantity	E1PAGE	JDE	DV920	Pending Promote	REPLACED

Deploying UDOs Using Change Assistant with the Application Interface Services (AIS) Server Connection (Release 9.2.8.2)

Beginning with Tools Release 9.2.8.2, JD Edwards EnterpriseOne Update Manager supports the deployment of User Defined Objects (UDOs) packages using Change Assistant with the Application Interface Services (AIS) Server connection.

This section discusses how to:

- Verify the Update Center and AIS connection preferences.
- Search for UDO package on the Oracle JD Edwards Update Center using Change Assistant.
- Download UDO packages as a batch.
- Deploy the UDO as a server batch.
- Download and analyze special instructions from Change Assistant.

Verifying Update Center and AIS Connections

To verify the JD Edwards Update Center and the AIS Server connections:

1. Launch Change Assistant from your desktop.
2. From the Edit menu, select **Preferences**. The Preferences form is displayed.
3. In the **Authentication** tab, enter valid Update Center credentials.
4. In the **AIS** tab, enter these valid EnterpriseOne AIS credentials.
   - Authorization: `Basic`
   - USERID: `AIS User ID`
   - Password: `AIS Password`
   - Environment: `Target AIS Environment`
   - Role: `*ALL`
   - URL: `AIS URL`
5. Click **OK** to save the preferences. The Status Bar at the bottom right of the screen verifies the connections.

Searching for UDO Packages on the Update Center Using Change Assistant

1. Select **Search for Packages** from the Change Assistant tree node.
2. In the Advanced Search screen, set these criteria:
   - **Type**: Select `EnterpriseOne User Defined Objects.`
   - **Release**: Select `9.2.`
   - **Platform**: Select `All Platforms.`
   - **Target Environment**: Select `PS920` or a valid target environment to deploy the package.
3. Click **Search**.

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> **Note:** The search results are environment aware. The packages that are already deployed to the specified environment are grayed out and not selected. The UDO packages that are already in the repository are also not selected.

> **Note:** You can show or hide the deployed packages using the [−][+] toggle buttons.

Downloading UDO Packages as a Batch

1. Click ☒ on the toolbar to deselect all packages.
2. Select one or more UDO packages.
3. To download the selected packages to the default location as a batch, click **Download To**.

   > **Note:** When AIS is active, the downloaded packages are imported to the package repository F96700R.

   After download completes, the Status of the downloaded packages changes to In Repository.

Deploying UDO Packages as a Batch

1. Select **Work with Server Batches** from the tree node.
2. Select the batch containing the downloaded packages. The Packages tab on the Batch Details pane lists all the packages in the batch.
3. Select **Deploy** 🗗 from the Toolbar. Alternatively, click the Batch Actions tab and then click **New Deploy Action**. The Software Update Environment Selection form is displayed.
4. Select the **Auto Share** option to automatically share the UDOs after deployment.
5. Click **OK** to start the deployment.
6. Click **Show Details** to review the deployment steps.
7. On completion of deployment, the Batch Activity Report is displayed in the browser. The status of each of packages deployed is available in the report.

   > **Note:** Click the package links to review the individual package activity.

Downloading Special Instructions from the Change Assistant

1. Open Change Assistant (with an Update Center connection) from the desktop link.
2. Click **Search for Packages** in the navigation node.
3. Enter the following search criteria in the **Advanced Search** form and click **Search**.
   - **Type**: `EnterpriseOne User Defined Objects`
   - **Release**: `9.2`
   - **Name**: `UDO package name`
4. Select the UDO package from the search results.
5. Use the Tool drop-down to select **Special Instructions**.
6. In the Special Instructions options, select **Special Instructions**.
7. Click **Analyze Packages** to view the report. The system downloads the data into the EnterpriseOne Software Archive Repository table (F96700R) table.

   > **Note:** Hover over the processing icon at the top of the browser window to view the background processes.

8. The Summary Analysis report includes the special instructions for the list of selected packages.

9. To review the special instructions for the selected UDO package, sign in to the Web Client and run **Work with Software Update Special Instructions** (P96700RW) from the fast path. Alternatively, you can navigate to Software Updates menu (GH9612) and run Work with Software Update Special Instructions (P96700RW).

10. In the Query by Example (QBE) field, enter the ESU Name and click **Find** to filter and review the special instructions.

Working with Software Update - Web (Release 9.2.6)

From the Software Updates menu, select the Work with Software Update - Web application (P96470W). You can use this application to access the details of a software update. You can also see the list of objects, and bugs for the selected software update.

To access the details for a software update:

1. Access the Work with Software Update - Web application from GH9612.
2. In the Update Name field, enter the name of the software update for which you want to run this application. Click Find.
3. The application will display the software update. Click Select. The application will display all the details of the software update.
4. From the Row menu, click Objects. The application will display the list of objects and object details for the selected software update.
5. From the Row menu, click Bugs. The application will display the list of bugs and their descriptions for the selected software update.

You can also filter the software updates by date and type using this application.

Deploying Batch Updates Using Change Assistant - Web Client (Release 9.2.8)

Starting with Tools Release 9.2.8, the JD Edwards Update Manager enables you to deploy multiple updates in the batch mode using the Work With Software Updates application (P96470W) instead of the Windows Deployment Server.

> **Note:** *Click here to view an OBE of this feature.*

Prerequisite

Ensure that the AIS Authentication is configured and you are connected to the Application Interface Server.

Deploying Batch Update Using Change Assistant (Web Client):

To download and deploy the batch from Change Assistant:

1. In the Change Assistant, open Search for Packages in the tree structure.
2. In the Advanced Search tab, select the Type as Electronic Software Updates, the Release Number as 9.2, and the Platform as Multi-platform.

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Click the Search icon.

3. Select the packages you want to download and deploy. You can select single or multiple packages.

   Note: You can filter the search results by environment using the Target Development Environment drop-down list. Filtering by environment reduces the dependency list as credit is given for either Cumulative Updates and/or Baselines. Leaving a wild card can result in the full dependency list as many environments may not have all the dependencies.

4. To download the selected package, click the Download icon and then select the Download To option, and then click Select Folder to download the package to the repository.

   Note: The Download and Deploy To option provides a way to download and deploy all selected packages in one step.

5. Navigate to the In Repository directory under Work with Packages in the Change Assistant tree structure, select the package you downloaded, and then click Deploy.

   The **Software Update Environment Selection** form appears.

6. Select the environment to be updated, enter an appropriate name for the batch in the Name field and click OK.

   Note: Select the Automate Special Instructions check box to deploy the UDCs and Glossary to your environment.

   The Change Assistant Deployment Summary window displays the result of the package deployment.

7. Click the package name to review the deployment summary report.

8. Click the package link within the summary report to review the detailed reports, the Deploy Software Update on Web (R96701W) and the Spec Merge for Web Deploy (R98700W) reports.

Validating Batch Deployment

After the deployment of the software package using the web client, you can verify the deployment on the HTML server.

1. Access the Work With Software Updates application (P96470W).

2. Search and select the software package that you deployed. The Software Updates Status pane on the Work with Software Updates form shows the completion status.

   You can view the list of generated reports in the CafeOne window (Software Update Plan History) of the Work With Software Updates form. Click on the View Output icons in the Software Update Plan History section to view the corresponding reports.

Deploying Configurations Using Change Assistant (Release 9.2.9)

Certain types of deliverables are categorized as Configurations.

- Configuration files that you can download from the JD Edwards EnterpriseOne Update Center are:
  - Data Packs
  - EnterpriseOne Samples

- Custom Configurations are created with Configuration Assistant and delivered to the Customer by the Business Partner.

Beginning with Tools Release 9.2.9, you can use the JD Edwards EnterpriseOne Change Assistant to deploy Configurations.

There are two methods of deploying Configurations using Change Assistant.

- Deploying Configurations using Change Assistant on the Deployment Server.
- Deploying Configurations using Change Assistant with the Applications Interface Server (AIS) from a web client (without Deployment Server).

Note: *Click here to view an OBE of this feature.*

Deploying Configurations Using Change Assistant on the Deployment Server

The JD Edwards EnterpriseOne Change Assistant supports the deployment of configuration packages and provides a Deployment Summary report after a successful deployment.

Note: Before you begin, verify that the AIS connection is disabled.
1. Launch **Change Assistant** from your desktop.
2. From the Edit menu, select **Preferences**.
3. In the AIS tab, ensure that **Disable AIS Connection** is selected.

To download and deploy the Configuration Packages from Change Assistant:

1. In Change Assistant, open **Search for Packages** in the tree structure.
2. In the Advanced Search tab, enter the search criteria and click **Search**.
    - To download Configurations, set the following criteria:
        i. In the **Type** field, select `Configurations.`
        ii. In the **Release** field, select `9.2.`
        iii. In the **Platform** field, select `All Platforms.`
        iv. In the **Search by Names - Name** field, enter `DP*.`
    - To download samples, set the following criteria:
        i. In the **Type** field, select `EnterpriseOne Samples.`
        ii. In the **Release** field, select `All.`
        iii. In the **Platform** field, select `All Platforms.`
3. Select the data packs you want to deploy.
4. Click the Download icon and then select **Download To and Deploy** option, and then select the required folder.

    Note: You can select the Download To option to download the packages to the selected directory. You can navigate to the Download directory under Work with Packages in the Change Assistant tree structure, and then deploy the downloaded packages.

5. Enter the required credentials in the JDEPLAN environment window and click **OK**.
6. Select the Environment in the Environment Selection window, and then click **OK**. You will see prompts warning of data replacement.

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7. Click **Yes** to Continue. Click **No** to stop the deployment.
8. The Change Assistant Deployment Summary window displays the summary of the packages deployed.
9. The Batch Summary report is displayed after the deployment is successful. Click the required package name to see the detailed report. The Package Summary report also has links to additional reports such as the Backup Status report.

Deploying Configurations Using Change Assistant with the AIS Server Connection - Web Client

Beginning with Tools Release 9.2.9, JD Edwards EnterpriseOne Update Manager supports the deployment of Configuration packages using Change Assistant with the Application Interface Services (AIS) Server connection.

This section discusses how to:

- Verify the Update Center and AIS connection preferences.

- Search for Data Packs or EnterpriseOne Sample packages on the Oracle JD Edwards Update Center using Change Assistant.

- Download Configuration packages as a batch.

- Deploy the packages as a server batch and review the deployment report.

Verifying Update Center and AIS Connections

To verify the JD Edwards Update Center and the AIS Server connections:

1. Launch Change Assistant from your desktop.
2. From the Edit menu, select **Preferences**. The Preferences form is displayed.
3. In the **Authentication** tab, enter valid Update Center credentials.
4. In the **AIS** tab, enter these valid EnterpriseOne AIS credentials.
   - Authorization: `Basic`
   - USERID: `AIS User ID`
   - Password: `AIS Password`
   - Environment: `Target AIS Environment`
   - Role: `*ALL`
   - URL: `AIS URL`
5. Ensure that the **Disable AIS Connection** option is not selected.
6. Click **OK** to save the preferences. The Status Bar at the bottom right of the screen verifies the connections.

Searching for Configuration Packages on the Update Center Using Change Assistant

1. Select **Search for Packages** from the Change Assistant tree node.
2. In the Advanced Search screen, set these criteria:
   - **Type**: Select `Configurations` (Data Packs).

     > **Note:** EnterpriseOne Sample packages can also be deployed using this feature.

> **Note:** Packages classified as Configurations that start with DME are not Configurations. They are Data Model.zip files that can be extracted using Change Assistant.

- ○ **Release**: Select `9.2`.
- ○ **Platform**: Select `All Platforms.`
- ○ **Target Environment**: Select `PS920` or a valid target environment to deploy the package.
- ○ **Search by Names - Name**: Enter `DP*`.

3. Click **Search**. The search result displays all the data packs available on the Update Center.

> **Note:** The search results are environment aware. The packages that are already deployed to the specified environment are grayed out and not selected. The UDO packages that are already in the repository are also not selected.

> **Note:** You can show or hide the deployed packages using the 🔲➕ toggle buttons.

Downloading Configuration Packages as a Batch

1. Click ☒ on the toolbar to deselect all packages.
2. Select one or more data packages.
3. To download the selected packages to the default location as a batch, click **Download To**.

> **Note:** When AIS is active, the downloaded packages are imported to the package repository F96700R. After download completes, the Status of the downloaded packages changes to `In Repository.`

Deploying Configuration Packages as a Batch

1. Select **Work with Server Batches** from the tree node.
2. Select the batch containing the downloaded packages. The Packages tab on the Batch Details pane lists all the packages in the batch.
3. Select **Deploy** 📤 from the Toolbar. Alternatively, you can click the Batch Actions tab and then click **New Deploy Action**. The **Web Deploy Environment Selection** form is displayed.
4. Click **OK** to start the deployment. You will see prompts warning of data replacement.
5. Click **Show Details** on the **Change Assistant Deployment Summary** page to review the deployment steps.
6. On completion of deployment, the Batch Summary report detailing the status of each package deployed is shown.

> **Note:** Click the package link within the Batch Summary report to review the individual package activity.

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7 Running Software Updates

Understanding Software Updates

After downloading the software update or updates, selecting the update to install, and selecting the environment to be updated, you choose to run the software update workbenches in either attended or unattended mode.

It is recommended that you use the JD Edwards EnterpriseOne and World Change Assistant to run software updates. However, if you choose not to use the JD Edwards EnterpriseOne and World Change Assistant (for example, if your company has fire walls that block your access), then use the methods discussed in this chapter to run updates.

You will use Oracle's JD Edwards EnterpriseOne Table Conversion Workbench if you are applying any Application Software Update (ASU).

Depending on the contents of the update, these workbenches may run:

- JD Edwards EnterpriseOne Control Table Workbench runs the batch applications for the planned merges that update the data dictionary (DD), user-defined codes (UDCs), menus, and workflow tables. It then updates the F98405 table to reflect completion, and writes a conversion log record to the F984052 Table Conversion History Log.
- JD Edwards EnterpriseOne Table Conversion Workbench runs the batch application that creates tables and indexes. It then updates the F98405 table to reflect completion, and writes a conversion log record to the F984052 Table Conversion History Log.
- JD Edwards EnterpriseOne Specification Table Merge Workbench runs the batch applications that update the specification tables. It then updates the F98405 table to reflect completion, and writes a conversion log record. The Object Librarian and Versions List merges are now a part of the specification merge.
- JD Edwards EnterpriseOne Package Workbench transfers the F9603 and F9631 Package Information tables from the Planner data source to the System - 900 data source. It then updates the Package Plan Detail table (F98404) to reflect completion.

Working with the Software Updates

The software update application combines a series of individual update workbenches into a single process. You will see only the workbenches that apply to your update.

You can run the workbenches manually (attended mode), or automatically (unattended mode). If you run the workbenches unattended, you will start the update as described. The status of each individual workbench will display as the workbench begins. Unattended mode is the default.

Starting and Running the Software Updates

This section provides an overview of starting and running the software updates and discusses how to:

- Select environments and start the software.

- Replace language data when running a language update.

- Restore a backup.

Selecting Environments and Starting the Software Update

The following procedure lets you select environments and starts the software update workbenches in unattended mode or attended mode. Unattended mode is the default.

In unattended mode, if an error is encountered in any of the individual workbenches, the process stops. Fix the error and continue. The software update resumes.

This procedure also creates a JD Edwards EnterpriseOne Object Management Workbench (OMW) project, an installation plan, and an update package for this update. In addition, the procedure optionally creates a backup of specs, so that the original specs can be restored if necessary.

Do not lock the deployment server during the software update (for example, with a screen saver password) because doing so pauses some processes. In addition, do not minimize any of the workbench forms, or the software update will not continue to the next workbench form until it is again maximized.

If you use a SQL Server database, be sure that these database options are selected before you start the software update:

- Select Into/Bulk Copy.

- Truncate Log on Checkpoint.

This table lists the requirements for starting the update workbenches:

Task	Details
Personnel	Installer
Logon status	On the deployment server, logged on as user JDE with the database password for user JDE, in the JDEPLAN environment.
Prerequisites	Software update installed on the deployment server.
Concurrent Tasks	None

To select the environment and start the update workbenches:

On the deployment server, log on to the JDEPLAN (planner) environment as user JDE with the database password for user JDE.

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From the System Installation Tools menu (GH9612), select Application Software Update, Electronic Software Update, or Language Update, depending on the type of update you are installing.

1. On Work with Software Updates, select the software update that you want to install. Click Next.

> **Note:** If you want to install more than one update at the same time, you must use the JD Edwards EnterpriseOne and World Change Assistant. See *Using Change Assistant* for more information.

The Work with Software Updates panel presents these row exits:

- Select

  Selects the software update, and puts a check mark in the media object column for the selected row.
- Deselect

  Deselects the software update, and puts an X in the media object column for the selected row.
- Update Detail

  Provides more information on the software update
- Update Status

  Shows the statuses of the processes that run during the software update.
- Update Sched Comp

  Displays all merges (DD Merge, Spec Merge, and so forth) that are scheduled for the software update. This row exit is not applicable for language updates.
- Update Objects

  Displays all objects, SARs and dependencies that are part of the software update. Use this exit to check for dependent and baseline updates.

  > **Note:** If you don't install the correct dependent or baseline updates, the system will display an error message.

- Update Cntrl Table

  Displays all DD, UDCs, Menus, Favorites, Tips of the Day, and Report Director Templates that are delivered with the software update. This row exit is not applicable for language updates.
- Update Table Changes

  Displays table changes delivered with the software update.
- Update Index Changes

  Displays index changes delivered with the software update.
- Update History

  Shows the environment and plan history of the software update.
- Advanced Setup

  The program performs a series of common processes when each software update is run on the first environment. If you want to run these processes on a second environment, however, you must use this

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option to select processes that you want to run again. Note that you must clear the check boxes for the processes you want to run again.

The Work with Software Updates panel presents these form exits:

- ○ Remove Updates

  Opens the Software Update Remove form where you can choose packages to remove. You can also select to remove files only or history and files.

- ○ Update Hist. Rpt

  Runs a report of all of the software updates that have been applied.

2. Double-click the environments where you want the software update installed.
3. If you want the software update to run in unattended mode, verify that the Unattended Workbench check box is selected. Unattended Workbench is checked by default.
4. If you want to make a backup of specs, so that the original specs can be restored, select the Backup check box. Backup is selected by default. This option is not available for language updates.

> **Note:** If you have custom modifications and will be retrofitting these to the new update, it is strongly recommended that you make a backup of your original specs. For more information about retrofitting, see *Retrofitting Custom Modifications*.

The Backup option creates a backup directory with the path **planner\package\software update name \PATHCODE.BAK**(for example, \planner\package\JL123456\DV900.BAK). All artifacts for the delivered objects (specs, source, include files) are stored in a single file with the extension .PAR. Control tables (data dictionary, UDC, and others) are not backed up. The contents of the backup file may be viewed with the JD Edwards EnterpriseOne Universal Table Browser tool or WinZip.

5. Select the Create OMW Project and Package Assembly check box if you want to create the OMW project and package assembly record for the software update. This option is not available for language updates.

The Software Update Environment Selection panel also presents these row exits:

- Select

   Selects the environment to be updated, and puts a check mark in the media object column for the selected row.
- Deselect

   Deselects the environment to be updated, and puts an X in the media object column for the selected row.
- Affected Objects

   Use this exit to view:

   - Objects that will be installed.
   - SARs that will be installed to a specific path code.
   - Checked out objects.
   - Modified objects.
   - Objects with tokens.

   This row exit is not applicable for language updates.
- Restore Backup

   If backups were performed for a software update for a specific environment, this option restores all specs and business functions. Control tables are not backed up and hence will not be restored. For information about restoring a backup, see *Restoring a Backup*. This row exit is not applicable for language updates.
- Delete Backup

   Deletes the backup directory created, and frees up disk space. A warning message is displayed if no backup was performed. This row exit is not applicable for language updates.
- Advanced Setup

   When applying software updates to alternate environments, we recommend that you do not perform the spec merge. Instead, transfer objects using OMW. However, this exit enables you to override this option and run the spec merge.

Replacing Language Data when Running a Language Update

In order to preserve your customized language records, the update process only appends new language records in the target environment and does not update any existing records. This is the default setting for updates, but you can change this setting by changing a processing option.

If you do not have any customized language records, you may want to change the processing option value so that changes delivered in the language update will replace the current records. Follow these steps to change the processing option value:

1. After installing language updates on the deployment server, sign onto JD Edwards EnterpriseOne JDEPLAN on the deployment server.
2. Enter BV in the Fast Path to open the Batch Version application.
3. Find R98403XB and select version XJDE0030.

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4. Select Processing Options from the Row Menu.
5. On the Advanced Tab, enter 'Y' for the following processing option:

   Enter a 'Y' to replace duplicate records in the target table, or enter 'N' (or leave blank) to preserve duplicate records in the target table.
6. Click OK to save your changes.
7. Repeat this process and change the same processing option value to a 'Y' for versions XJDE0031, XJDE0032, and XJDE0033.
8. Enter GH9612 in the Fast Path.
9. Run Language Updates to apply the update to the target environment.

Restoring a Backup

Use this procedure to restore a backup you made while starting the software update. If you are not restoring a backup, skip this section and proceed to Completing the Update.

You can restore a backup if you selected the Backup check box on the Software Update Environment Selection panel, as described previously.

To restore a backup:

From the System Installation Tools menu (GH9612), select Application Software Update, or Electronic Software Update. The Work with Software Updates panel appears.

1. Select the software update for which you want to restore the backup.
2. Click Next. The Software Update Environment Selection panel appears.
3. Select the environment for which you want to restore the backup.
4. On the Row Exit menu, click Restore Backup. The backup is restored.

   This may take several minutes.
5. Click Cancel to close the Software Update Environment Selection panel.

   > **Note:** The restore process doesn't remove objects that were added through the software update. If you wish to remove the added objects, use the JD Edwards EnterpriseOne Object Management Workbench (OMW) project created by the software update. A list of added objects can be found in the software update spec merge report. If you are restoring objects for a software update that you have already transferred to other path codes, make sure you re-transfer the restored specs to the other path codes using OMW. If you wish to remove the added objects in all path codes, use the OMW project created by the software update.

Completing the Update

This section provides an overview of the completion process for the attended mode and discusses how to complete these update workbenches:

- Add a Security Override for Running Table Conversions.

- Run Table Conversions.

- Configure your control tables.

- Merge your specification tables.

- Restart the Specification Merge.

- Configure your packages.

- Validate the update.

If you selected the unattended mode, the process begins and all workbenches are completed automatically. In this case, skip the following tasks and continue with "Custom Modifications and Packages."

When the workbenches are complete, an update package must be built.

When the software update begins, status messages appear in the status bar at the bottom of the screen reporting progress. If an error occurs, the process stops. In this case, click Previous to return to the Work with Software Updates screen, and then, on the Row menu, click Update Status. Status messages are displayed.

Adding a Security Override for Running Table Conversions

If your database is Oracle, SQL, or *DB2 for Linux, UNIX, and Windows database* , you must add a security override so that the table conversion process can drop and recreate a table. 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 data source owner, and then add an override for the EnterpriseOne user who will run the table conversion.

To add a system user for the data source owner:

1. In P98OWSEC, select the form exit Add System User.
2. On Work with System Users, enter the appropriate data source owner (for example **PRODDTA, TESTDTA**, or **CRPDTA**) in the System User field and select Find.
3. If no values are returned, add the data source owner as a system user by selecting Add and completing the fields on the System User Revisions form:

    ○ System User

    ○ Data Source

    ○ Password

    ○ Password Verify

4. Click OK and then Cancel and Close to return to the Work with User Security form.

To add an override for an EnterpriseOne user who is going to run the table conversion:

1. On Work with User Security, enter the user who is going to run the table conversion, and select Find.
2. Select the Form exit, Add Data Source.
3. On Add Data Source, complete the User ID, Data Source, and System User fields.

> **Note:** This override can be deleted once the table conversion has run.

> **Note:** For *IBM i* , either sign on as a user who has *ALLOBJ rights to the table to be converted or complete the steps above, setting 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 *ALLOBJ rights to the table.

Running Table Conversions

Table conversions are performed after applying the software update to the path code. Review the special instructions for the software update that you are applying to see if there are any table conversions.

> **Note:** You must be signed on as an administrative user who has rights to change security overrides.

To run table conversions:

1. Build and deploy an update package containing the software update changes.
2. Install the update package on an administrative client.
3. Sign onto the administrative client in the environment that had the changes applied.
4. For each table conversion that is going to be run, check which data source contains the base table that the table conversion is changing. The name of the table should be in the special instructions.
5. Add security overrides for the JD Edwards EnterpriseOne user who will run the table conversions.

   See *Adding a Security Override for Running Table Conversions*.
6. Go to Batch Versions and verify, on the Properties tab for the table conversions, that the input and output environments point to the login environment.
7. Run the table conversions.
8. Review the table conversion logs in the print queue, and verify that the table conversions completed successfully.

Configuring your Control Tables

If you are running the software update in unattended mode, this process is run automatically.

Complete this task to configure your control tables.

1. On Control Table Workbench, the system displays all control table merges in the detail area. From the Form menu, select Merge All.
2. After each merge finishes, verify the output of the report produced.
3. From Control Table Workbench, click Next.

Merging your Specification Tables

If you are running the software update in unattended mode, this process is run automatically.

To merge your specification tables:

1. On Specification Table Merge Workbench, from the Form menu, select Merge All.
2. After the merge finishes, verify the output of the report that is produced.
3. After all merges complete, click Next.

   The Package Workbench form appears.

Restarting the Specification Merge

If you are running the software update in unattended mode, this process is run automatically.

If the Specification Merge stops before it completes successfully because the merge of an object fails, you can restart it from the point where it stopped. If all merges complete successfully, you can skip this task.

To restart the Specification Merge:

This table lists the requirements for restarting the specification merge.

Task	Details
Personnel	Installer
Logon status	On the deployment server, logged on as user JDE with the database password for user JDE, in the JDEPLAN environment.
Prerequisites	Specification merge must be stopped.
Concurrent Tasks	None

Before you restart the Specification Merge you must set the status of the failed merge back to Not Processed (zero). The restarted Specification Merge will skip completed merges and process the failed merge and all subsequent merges.

Use this procedure to set the status of the failed merge back to Not Processed (zero):

From Advanced Operations menu (GH9611) select Specification Merge Status (P98700).

1. On the SpecMerge Status panel, complete these fields:

    ○ **Package Name**

       Enter the name of the software update.
    ○ **Source Environment**

       Enter JDEPLAN (the Planner environment).
    ○ **Target Environment**

       Enter the name of the environment you are updating.
2. Click Find. All objects that are part of the specification merge are displayed.
3. Select the object for which the specification merge failed. The object will have a status of 4 (Error) in the Merge Status column.
4. On the Row Exit menu, click Reset Merge Status. The Reset Merge Status panel appears.
5. In the New Merge Status field, specify **0** (zero, or Not Processed).
6. Click OK.

    The object's merge status is changed.
7. Click Close.

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You can now restart the specification merge.

Configuring your Packages

If you are running the software update in unattended mode, this process is run automatically.

Package Workbench transfers the F9603 and F9631 Package Information tables from the Planner data source to the System - 900 data source. It then updates the Package Plan Detail table (F98404) to reflect completion.

If you are running the software update in unattended mode, this process is run automatically.

Item	Details
Personnel	Installer
Logon status	On the deployment server, logged on as user JDE with the database password for user JDE, in the deployment environment (DEP900).
Prerequisites	None
Concurrent Tasks	None

1. On Package Workbench, review your packages.
2. From the Form menu, select Configure. The Congratulations form appears.
3. Click Finish. The Software Updates History report will appear.

   Note: After this screen appears, processing continues to occur in the background. Once completed the program displays a message that the update was completed successfully.

   After this report appears processing continues in the background. Once this is completed, an Update Completion message appears.
4. Click OK.

Note:
- *Restarting the Specification Merge*.
- Reports in the *JD Edwards EnterpriseOne Application Release 9.0 Installation Guide*.

Validating the Update

After the spec merge process, JD Edwards EnterpriseOne generates the Software Update Report (R96701) that lists the updated objects and the SARs addressed by the update.

For Tools Release 9.2.1.x and after, if the path code value in the F00942T.emdbsrcflg field is set to 1, this report also updates the Object Librarian Archive Repository (F98780R) and Object Librarian Archive History (F98780H) tables in central objects.

This report is summarized in a PDF file that opens automatically once the update process is complete. If the spec merge process fails, this report is not created.

To validate the update process, view the R96701 report and note the value of the Object Install Flag for each of the objects listed in the report:

Object Install Flag Value	Description
0	The object was not updated because the existing object in the environment is more recent that the object in the software update.
1	The object is selected to be applied to the environment. (This is the status of all objects in the list before the upgrade starts, but should not be observed when the update process is complete.)
2	Updated object was applied to the environment.

For Tools Release 9.2.1.x and after, also, note the value of the Update Repository Table column for each of the objects listed in the report:

Update Repository Table Value	Description
Not Applicable	The object was not updated by the spec merge so there was no need to save it to the F98780R and F98780H tables.
Updated	The object was updated in the F98780R and F98780H tables in central objects.
Not Updated	There was an error saving the information to the F98780R and F98780H tables.

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8 Using Object Usage Tracking (Release 9.2.1.2)

Understanding Object Usage Tracking

You perform an object usage tracking analysis to determine the frequency that objects are being used within a path code. This information will enable you to determine the objects that need to be validated prior to upgrading or applying an update to your system.

See the *JD Edwards EnterpriseOne Tools Security Administration Guide* to secure applications to system administrators only.

You can track the usage of the following objects:

- Applications (APPL)
- Batch Applications (UBE)
- Business Functions (BSFN)

Note: Object Usage Tracking is available for JD Edwards EnterpriseOne Application Release 9.0 and later releases.

Working with Object Usage Tracking Configuration (P980042T)

Object Usage Tracking is disabled by default. You enable Object Usage Tracking with the Working with Object Usage Tracking Configuration (P980042T) application. You must first enable Object Usage Tracking for the system prior to enabling at the path code level.

To activate Object Usage Tracking:

1. Navigate to: EnterpriseOne Menus/ EnterpriseOne Life Cycle Tools/Application Development(GH902)/Object Usage Tracking.
2. Click Object Usage Tracking Configuration.

   The Revise Object Usage Tracking Enablement form displays the following fields and columns:

   System Level Tracking Enabled

   Checked - object tracking is enabled at the system level.

   Un-checked - Object tracking is disabled at the system level.

   Tracking

   Green circle - Object tracking is enable for the path code.

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Red Square - object tracking is disabled for the path code.

Path Code

The available path codes.

Description

The path code descriptions.

3. Click the System Level Tracking Enabled check box.
4. Click the path code row in the Tracking column to enable object usage tracking for that path code.
5. Close the application.

> **Note:** You can use Server Manger to restart the HTML Server and Enterprise Server for the changes in Object Usage Tracking Configuration to take effect immediately. Otherwise, the configuration changes will not take effect until the Object Usage Tracking Configuration is automatically updated on the server every 60 minutes.

Disable / Enable Object Usage Tracking by Object Type (Release 9.2.2)

You can enable and disable object types through Revise Usage Tracking by Object Type (W980042TC). The Usage Tracking Configuration Lists (F98900) table maintains the object types that are disabled and enabled. By default the F98900 table is empty to prevent disruption of current Object Usage Tracking configuration. Applications and batch application are enabled for tracking and business functions are disabled until a record is added and set to disable or enable.

To enable or disable an object type for Object Usage Tracking:

1. Navigate to: EnterpriseOne Menus/ EnterpriseOne Life Cycle Tools/Application Development (GH902)/Object Usage Tracking.
2. Click Object Usage Tracking Configuration.
3. Select the path code you want to exclude an object type in.
4. On the Row menu, click Object Type Tracking.
5. On the Revise Object Type Enablement form click the Tracking column for the object type to want to enable / disable.

   - Green Circle = Enabled
   - Red Square = Disabled

6. Click Close.

Object Exclusion list (Release 9.2.2)

You can add and remove object names in the Object Exclusion List (W980042T). When you add object names to the grid, Object Usage Tracking does not track them. If a business function is in the list and calls another business function, the called business function is tracked unless also added to the Object Exclusion List. The Usage Tracking Configuration Lists (F98900) table maintains the names of objects in the Object Exclusion List.

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To exclude an object from Object Usage Tracking:

1. Navigate to: EnterpriseOne Menus/ EnterpriseOne Life Cycle Tools/Application Development (GH902)/Object Usage Tracking.
2. Click Object Usage Tracking Configuration.
3. Select the path code you want to exclude an object in.
4. On the Row menu, click Exclusion List.
5. Enter the object to be excluded in the grid.
6. Click OK.

Copy Path Code

You can copy the object type and exclusion list for a path code to another path code.

To copy the tracking configuration of a path code:

1. Navigate to: EnterpriseOne Menus/ EnterpriseOne Life Cycle Tools/Application Development (GH902)/Object Usage Tracking.
2. Click Object Usage Tracking Configuration.
3. Select the path code you want to copy.
4. Click the Copy button on the tool bar.
5. In Object Path Search & Select, select the path code you want to copy to.
6. Click the Select button on the tool bar.

Working with Object Usage Tracking Detail (P98911)

The Object Usage Tracking Detail (P98911) application displays all object usage recorded by the system that has not been purged from the Object Usage Tracking Detail (F98911) table. Object usage is any time a tracked object is accessed by a user or the system. Sub-system calls to an object will create only one record. The grid displays the object name, the user, path code, environment, date, time, and future use columns .You can delete individual or multiple records from the grid, or use Purge Object Usage Tracking Detail (R98911P) to delete records.

To launch Working with Object Usage Tracking Detail:

1. Navigate to: EnterpriseOne Menus/ EnterpriseOne Life Cycle Tools/Application Development (GH902)/Object Usage Tracking.
2. Click Object Usage Tracking Detail.

Note: It is recommended you increase the table size for Object Usage Tracking Detail (F98911).The table size necessary will depend on how often you run R98911P.

Working with Object Usage Tracking Summary (P98902)

The Object Usage Tracking Summary (P98902) application displays data from the Object Usage Tracking Summary (F98902) table, which is populated by running the Summarize Object Usage UBE (R98902). Object usage data in this

table can be summarized by Object Name, Object Name/Form/Version, and/or Product Code. In addition, object usage counts for each type can be totaled by day, month, or year.

To launch Object Usage Tracking Summary:

1. Navigate to: EnterpriseOne Menus/ EnterpriseOne Life Cycle Tools/Application Development (GH902)/Object Usage Tracking.
2. Click Object Usage Tracking Summary.

Working with Summarize Object Usage UBEs (R98902)

The Summarize Object Usage UBEs (R98902) populates the F98902 table with data up to the last complete day. The following four batch versions summarize data in F98902:

- XJDE0001 - Summarize Object Usage by Object Name UBE

- XJDE0002 - Summarize Object Usage by Object Form Version UBE

- XJDE0003 - Summarize Object Usage by Product Code UBE

- XJDE0004 - Summarize Object Usage by Business Function UBE

Each time you run a summarization version, it will summarize the records in the F98911 or F98912 tables based on the Object Tracking Type:

- 01 - Object Name (F98911 and F98912)

- 02 - Object Name/Form/Version (F98911)

- 03 - Product code (F98911 and F98912)

- 04 - object Name/Business Object (F98912)

Each summary will summarize by Tracking Unit:

- 01 - Hours per Day (24)

- 02 - Days per Month (28-31)

- 03 - Months per Year (12)

Each time you run a summarization version, it will add to the existing records for Days per Month and Months per Year, so that it is cumulative from the first time it was executed and it will create new records for:

- Hours per Day for new days

- Days per Month for new months

- Months per year for new years

The first time you run a summarization version, it will summarize to the current date minus 1 for the Object Tracking Type version selected.

At the end of the summarization, the UBE adds a LASTSUMMARY record to the F98902 table with Object Tracking Type of 01, 02, 03, 04 with the current date minus 1. This record will contain a value in the OSOTUT field of how many F98911 records were read.

The next time you run the UBE, it will use the LASTSUMMARY date and will only use records from that date to the current date minus 1. Each Object type will have a LASTSUMMARY record.

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To launch Summarize Object Usage UBEs:

1. Navigate to: EnterpriseOne Menus/ EnterpriseOne Life Cycle Tools/Application Development (GH902)/Object Usage Tracking.
2. Click Summarize Object Usage by (select a version).

Purging Object Usage Tracking Detail for Applications and Batch Applications (R98911P)

You purge records from the Object Usage Tracking Detail (F98911) table by running the Purge Object Usage Tracking Detail UBE (R98911P). Complete the following processing options prior to running

Select Tab

Path Code

The path code you want to purge from.

Object Tracking Purge From Date

The date you want the purge to start.

Object Tracking Purge To Date

The date you want the purge to end.

Process Tab

Proof or Final Mode

Blank = Proof Mode

1 = Final Mode

Report View

Blank = View the summary.

1 = View the detail purge records.

> **Note:** It is recommended you run the Purge Object Usage Tracking Detail UBE in proof mode first to verify the summarization UBEs have been run. Use the Proof mode to generate a report that displays the Path Code, From and To Dates, Purge Total, and Last Summary Dates for each Tracking Type.

Purging Business Function Tracking Detail (R98912)

You purge records from the Business Object Usage Tracking Detail (F98912) table by running the Purge Business Function Tracking Detail UBE (R98912P).

Complete the following processing options prior to running:

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Select Tab

Path Code

The path code you want to purge from.

From Date

The date you want the purge to start.

To Date

The date you want the purge to end.

Process Tab

Proof or Final Mode

Blank = Proof Mode

1 = Final Mode

Working with Object Usage Tracking Composed EnterpriseOne Page

The Object Usage Tracking Composed EnterpriseOne Page (CMP_1701270001JDE) presents four charts for you to use to analyze Object Usage Tracking data.

> **Note:** The Object Usage Tracking Composed Page is available for JD Edwards EnterpriseOne Applications Release 9.2 and later releases.

See the *JD Edwards EnterpriseOne Tools Security Administration Guide* to secure UDOs to system administrators only.

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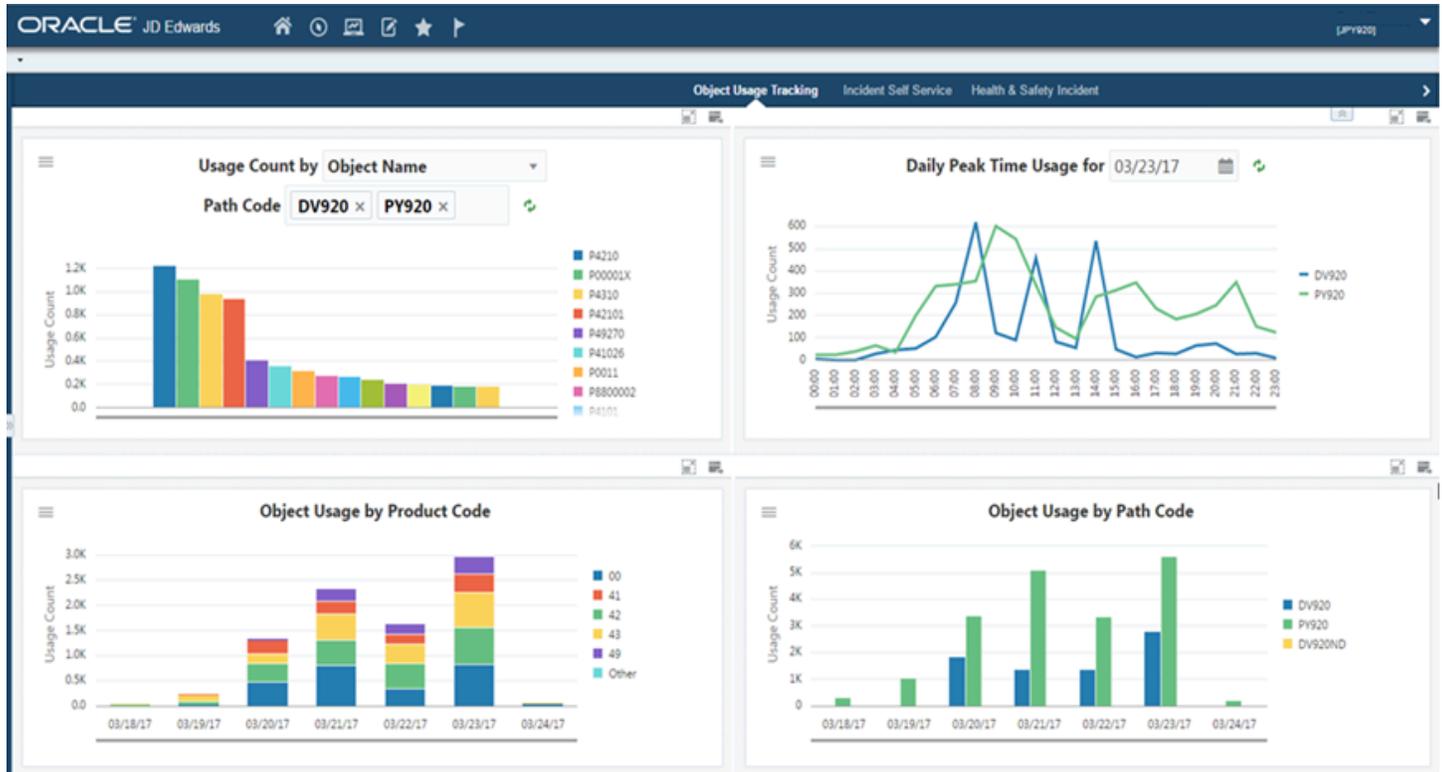
Usage Count by (Tracking Type) Chart

Use this chart to view object usage for the specified path code. The chart is based the Object Usage Tracking Summary table (F98902).

Additionally, you can use the drop-down menu on the top of the chart to change the data that the system displays. You can select one of the these options:

- Object
- Object/Form/Version
- Product Code

You can use the menu to further filter the data in the chart that the system displays.

The queries associated with the object Usage Tracking Summary table are all filtering on Tracking Unit 01. Any query you create for use with this composite page must be filtering on one of the three tracking units. Tracking Unit 01 provides the most detail.

Daily Peak Time Usage for (Date) Chart

Use this chart to view daily object usage by path code. The chart is based over the Object Usage Tracking Summary table (F98902). You can use the input date field in the chart's title to change the date of the data displayed in the chart.

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You can also use the menu to further change the data displayed in the chart.

- The Path Code field determines which path code totals display on the chart. If you select multiple path codes, a separate line for each path code displays on the chart. If you do not select a path code, totals from all path codes in the F98902 are displayed in separate lines on the chart by default.

- The Tracking Type field determines the type of summary totals displayed on the chart. For example, object usage totals may only be summarized in the F98902 by product code, so you will need to select the Product Code option from this field to view the data in the chart.

Note: If the Universal Time setting in User Preferences is populated, the usage totals displayed on the chart will be adjusted to the account for your time zone offset. This will correctly display the hourly totals according to your day. Otherwise, all hourly totals on the chart are displayed according to Coordinated Universal Time (UTC) regardless of your time zone.

Object Usage by Product Code

Use this chart to view object usage totals by Product Code for a specified number of days. The chart is based over the Object Usage Tracking Detail table (F98911) and can show object usage totals for the past seven days.

You can use the menu to further change what data displays in the chart.

- The Path Code field determines which path code totals display on the chart. If you select multiple path codes, product code totals for all selected path codes are combined into a single bar for each date. If you do not select a path code, usage totals for all path codes in the F98911 display on the chart by default.

- The Number of Days field determines the number of dates appearing on the chart. You can select between one to seven days in the past.

- The Display Count field determines the number of individual product code totals displaying on the chart. If the chart data contains totals for more product codes than the number specified, the totals beyond this number are accumulated and displayed under an "Other" category.

Object Usage by Path Code

Use this chart to view object usage totals by path code for a specified number of days. The chart is based over the Object Usage Tracking Detail table (F98911) and can show object usage totals for the past seven days.

You can use the menu to further change the data displaying in the chart.

- The Path Code field determines which path code totals display on the chart. If you select multiple path codes, a separate totals bar for each selected path code displays on each date. If do not select a path code, usage totals for all path codes in the F98911 display on the chart by default.

- The Number of Days field determines the number of dates appearing on the chart. You can select between one to seven days in the past.

These charts are based on the Object Usage Tracking Detail and Summary tables. By default, the charts are set up to render using predefined queries found in the chart's menu drawer. You can modify the queries to better meet your requirements. Additionally, you can add filters in the menu of each chart to further restrict the chart's data. The filters provide selection capabilities based on the columns included in the primary table used by each chart. For example, with the Daily Peak Time Usage chart, you can display hourly totals for a single object by creating a filter to only retrieve data where the F98902 Summary ID (OTSUM) column equals the name of the object.

The shared queries are:

- All Supported Types (QRY98902_1702010003JDE)

  Tracking Unit = 1

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- Applications (QRY98902_1701300005JDE)
  Tracking Unit = 01
  OMWOT = APPL

- Applications and Reports (QRY98902_1701300008JDE)
  Tracking Unit = 01
  OMWOT = APPL or UBE

- Reports (QRY98902_1701300006JDE)
  Tracking Unit = 01
  OMWOT = UBE

> **Note:** To limit irrelevant objects from appearing in the charts, you can add an exclude into the query, for example; SY not in (' ','H92','H95','H96U','H96B') and SYR not in (' ','00','UX'). This will limit some tools system codes that you may not want in your reporting.

User Access and Application Usage Tracking (Release 9.2.8.2)

Starting with Tools Release 9.2.8.2, JD Edwards EnterpriseOne provides you two new charts to track the user access in EnterpriseOne. These charts provide graphs of unique user count for each application module and user count for each application module based on user roles. The data in the charts is displayed based on the application modules provided in the Application Module Mapping. The application also enables you to create custom product codes and application modules.

The user access data can be filtered for a specific date range.

You have the below charts available to track user access:

- User Access by Application Modules
- User Access by Application Modules – Based on Roles

See *JD Edwards EnterpriseOne Tools Security Administration Guide* to secure the charts for user access and Application Module Mapping to System Administrators only.

> **Note:** Tools Release 9.2.8.2 provides you a Composed EnterpriseOne page, JDE Usage Tracking, that lists charts and applications for visibility into user access, object tracking, and security activity. For details, see *UX One: JDE Usage Tracking Composed EnterpriseOne Page (Release 9.2.8.2)* in the *UX One Roles User Guide*.

Prerequisite

Before you access User Access Tracking ensure that Object Usage Tracking is enabled. See *Disable / Enable Object Usage Tracking by Object Type (Release 9.2.2)* for details.

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You must also create a query in Working with Object Usage Tracking Detail (P98911) before you access User Access Tracking. To create a new query in Working with Object Usage Tracking Detail:

1. Access Working with Object Usage Tracking Detail and click **Manage Queries**.
2. In the Query Manager window, expand the Additional Fields Selection.
3. Select Environment Name (QBE) from the list.
4. Ensure the Match All option is selected.
5. Select "contains" from the drop-down list in the first column.
6. In the next field, define the environment value. For example, PD920.
7. Click **Save**.
8. Provide a name for the created query and click **OK**.

Understanding Work with Application Module Mapping

Work with Application Module Mapping has system-defined product codes and application modules. You can view all the default product codes and the application module for tracking individual application module access. You can also use Work with Application Module Mapping to create custom product codes and application modules.

To access Work with Application Module Mapping, enter P98901 in the fast path. Alternatively, you can navigate to **EnterpriseOne Menus**, select **EnterpriseOne Lifecycle Tools**, **System Administration Tools**, **Security Maintenance**, **User Access Tracking**, and then select **Work with Application Module Mapping**.

Work with Application Module Mapping also enables you to create custom application module codes. To create a custom application module code, follow the steps in *Adding a UDC* section in *JD Edwards EnterpriseOne Tools Foundation Guide*.

After you create custom module, follow the below steps to create mapping for custom codes and custom application modules:

1. In Work with Application Module Mapping, click **Add** to access Add Application Usage Module Mapping form.
2. In Add Application Usage Module Mapping form, enter the custom Code.
3. Enter the Module Code in the Module Code field.
4. Click **OK**.

If you want to delete any custom product code and application module, select it in the from the list and click **Delete**.

> **Note:** Delete option is disabled for system defined product codes and application modules.

Use the Form menu in Work with Application Module Mapping to access the charts for User Access by Application Modules and User Access by Application Modules - Based on Roles.

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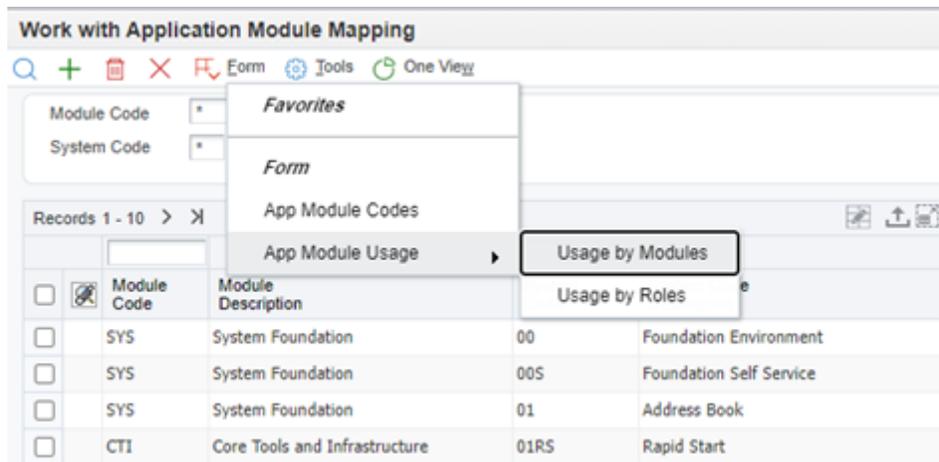
User Access by Application Modules

Use this chart to view unique user access count by Application Modules in EnterpriseOne. The graph is based on the Object Usage Tracking Detail table (F98911) and can show the unique users accessing each module.
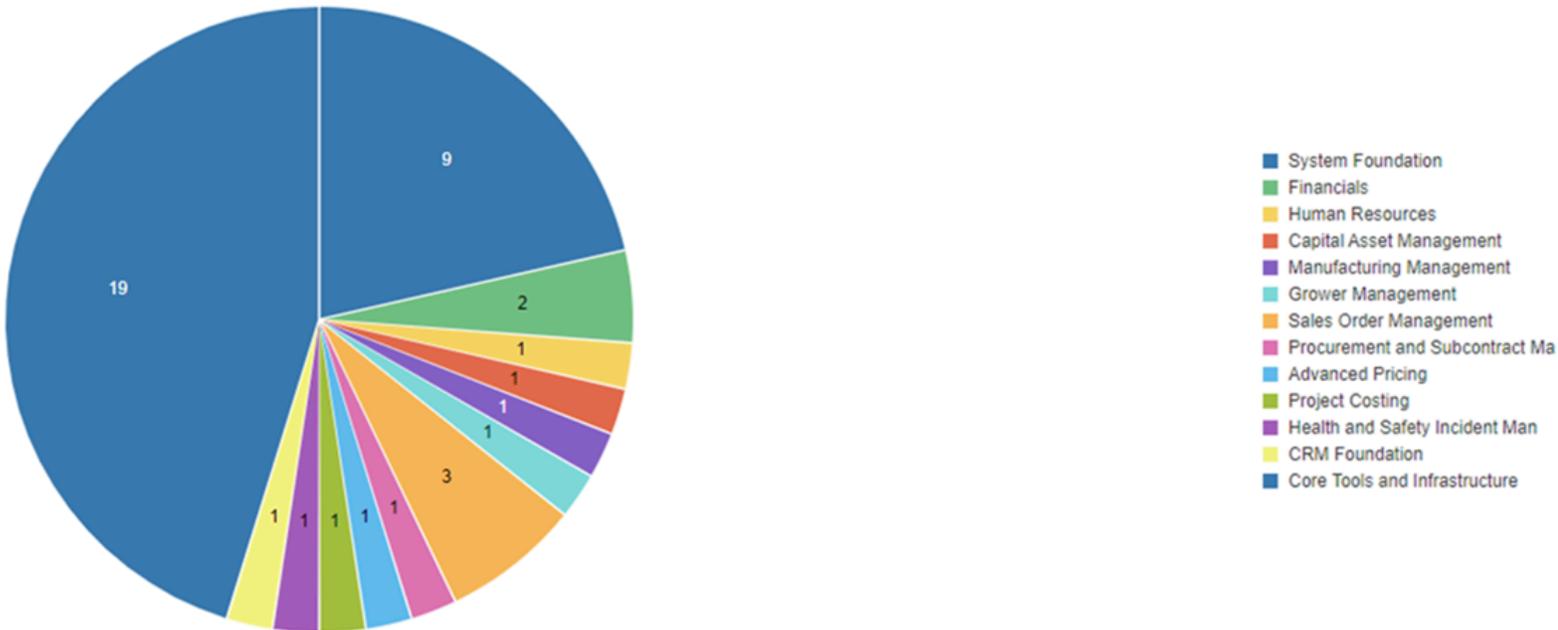
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You can use the available fields to filter the data.

- The Begin Date and End Date fields determine the date range for which you want to view the user access count.
- For the Modules field, All Modules is selected by default. Use the dropdown menu to select the appropriate module.

The dropdown menu lists only those application modules that have been accessed within the date range.

Click the refresh icon, next to the module dropdown, after you change the Application Module to refresh the data.

You can select or deselect specific application modules from the legend to filter the data in the chart.

User Access by Application Modules – Based on Roles

Use this chart to view application access count by Roles in EnterpriseOne. The graph is based on the Object Usage Tracking Detail table (F98911) and can show the number of users accessing each Application Module based on their roles.
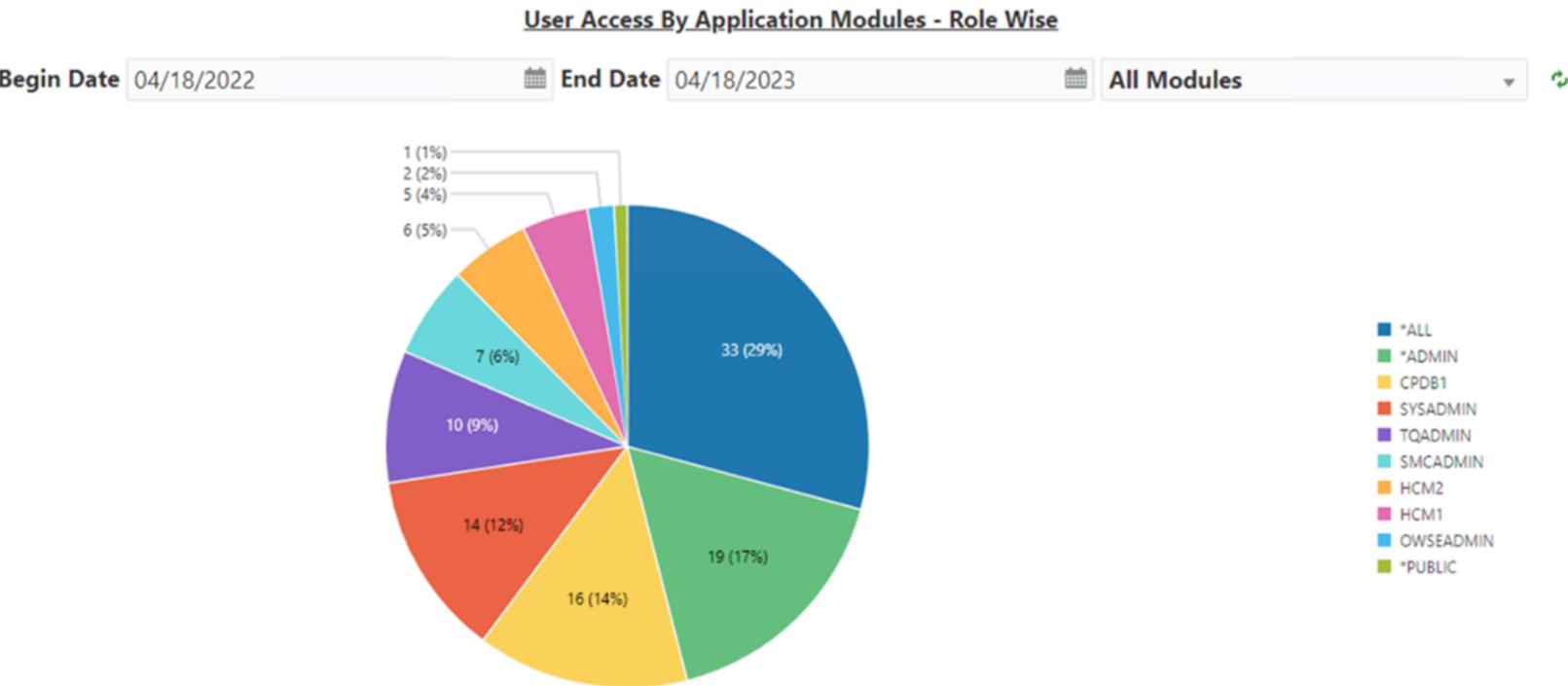
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User Access By Application Modules - Role Wise

You can use the available fields to filter the data.

- The Begin Date and End Date fields determine the date range for which you want to view the user access count based on user roles.

- For the Roles field, All Roles is selected by default. Use the dropdown menu to select the appropriate role.

The dropdown menu lists only those roles that have been used to access the application modules within the date range.

Click the refresh icon, next to the role dropdown, after you change the role to refresh the data.

You can select or deselect specific application modules from the legend to filter the data in the chart.

Downloading Application Module Usage Metrics

You can download the application module usage data in a `.csv` file. To download:

1. From the User Access by Application Modules chart, double click the data label to open the detailed list of users accessing a specific module. Similarly, from the User Access by Application Modules - Based on Roles chart, double click the data label to open the detailed list of user roles accessing a specific module.
2. Click the download icon.

A `.csv` file with users accessing the selected module or roles is downloaded.

9 Using the Software Update Impact Analysis Tool

Understanding the Software Update Impact Analysis Tool

Oracle's JD Edwards EnterpriseOne Software Update Impact Analysis Tool has been added to help manage your software update. This tool is used to gauge the level of impact a software update will have on your existing system. Users may access this tool from a client workstation or the deployment server.

You perform an impact analysis when you download ESUs. If you are performing a new installation, or if you are performing an upgrade, you do not need to do an impact analysis. If you do need to perform an impact analysis, you do so after you have installed the update on the deployment server, but before you deploy the update to another environment.

This is a list of features that this tool provides:

- Identification of what Software Action Requests (SARs), objects, and control files will be applied to the system.
- Special instructions for SARs.
- List of objects associations with a SAR.
- List of any dependent software updates.
- Identification of any table conversions within a software update.

It can also be used to manage the application of the software update to your system. A system administrator may assign specific objects, control files, and SARs to individual users. Users who have been assigned objects can update the status of approved objects, SARs, and control files that have been assigned to them. They can also keep track of the status of their approvals.

The web client version, Object Usage for Software Update Impact Analysis (P96710) is available for JD Edwards EnterpriseOne Application Release 9.0 and later releases. (Release 9.2.1.2)

Working with the Software Update Impact Analysis Tool

Access the JD Edwards EnterpriseOne Software Update Impact Analysis Tool:

1. Logon to a JD Edwards EnterpriseOne client with administrative privileges.
2. In the fast path enter GH9612.
3. From the Software Updates menu, right-click Software Update Impact Analysis → Prompt For → Values.
4. Enter the path to the location of the update.xml file (for example, \\deployment server name \E920\ImpactAnalysis). Since this utility can be run from a client or the deployment server, it is important that the XML files are located in a central location. By default, the XML files will be downloaded to the unc path provided in the previous example by the installation of a software update.
5. Click OK.
6. From the Software Updates menu (GH9612), select Software Update Impact Analysis (P96710).

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> **Note:** Within this form, a list of earlier analyses are listed in the main work area. This is the core navigation screen that will enable you to access many of the features available within this tool.

Configuring a New Analysis

To configure a new analysis:

1. Click Add.
2. When creating a new report complete these fields:
   - **Software Update Name**
     Click the browse button to search for the software update you wish to analyze.
     Select the desired software update.
     Click the **Select** button on the tool bar. This will populate the Software Update Name field in the setup screen.
   - **Description**
     Enter additional details on this update in this field's text box.
   - **Environment Name**
     Enter the environment to do the analysis on (for example, DV900).
   - **Expected Completion Date**
     Enter the date you anticipate to complete the analysis.
   - **Percent Complete**
     Enter the percent complete for this update.
   - **Impact Analysis Status**
     Use the visual assist to select the status of the impact analysis (for example, 03 - In Process, 02 - Configure).
3. Click OK to return to the SU Impact Analysis Master screen.

Analyzing your Software Update

Access the JD Edwards EnterpriseOne Software Update Impact Analysis Tool: On the SU Impact Analysis Master screen, highlight the record that was created in the previous steps. Once this is completed click the Analyze row exit.

> **Note:** Once this step has been completed, analysis processing occurs in the background. This processing may take several moments. Once it is completed, a success message will appear in the status bar area.

Reviewing the Results in the Impact Analysis - Master View

From the SU Impact Analysis Master screen, select the Master View row exit.

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The overall view of the analysis displays and includes:

- SARs.
- Objects and control files in SARs.
- What objects are affected or merged.

> **Note:** The master view should be accessible to the CNC administrative user only by enforcing security.

Assigning Objects to Users

Objects may be assigned to different users within this tool for further analysis.

1. To assign objects to users, select the Assign exit row.
2. Highlight the object you wish to assign and click the Select exit row.

   A check mark will appear to the left of the item you selected. Multiple records can be selected at once within this screen as well.
3. In the Assigned To text box, enter the address book number of the user who will receive the assignment.
4. To complete this process, select the Assign option from the row exit.

Notifying Users of Assignments by Email

Complete this task to notify users of their assignments by email.

1. Select the Form exit.
2. Select one of these row options:

   ○ Approval Report

   Shows the latest states of what users have done with objects.
   ○ Notify all

   Sends a global email notification to all users that have been assigned objects (past and present).
   ○ Notify today's assigners

   Sends an email notification to users who have been assigned today.
3. To exit this screen click the Close button. This will take you to the Impact Analysis - Master View.
4. Click the Close button again to enter the SU Impact Analysis Master screen.

Viewing any Prerequisites prior to Installing a Software Update

Complete this task to view the prerequisites before you update the software.

1. Within the SU Impact Analysis Master screen select the Pre-reqs View exit row.

   The Pre-reqs View displays any prerequisites that may be required to apply a software update. These requirements may include:

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- Base line software updates that are required prior to installing the current software update.
- Indicates any quarterly updates that already have the dependent / baseline software update.
- Through the Install Status column, it will indicate if an update has been installed.

2. To exit this item, click the Close button to re-enter the SU Impact Analysis Master screen.

Viewing Objects Affected by the Software Update

Select the Object View row to display this screen.

Select one of these radio buttons to filter objects:

Objects that will be affected by applying this software update (Default)
Lists all affected objects delivered by the software update.

All objects delivered with this software update
Lists all objects in the software update.

Accepting Assigned Objects

Complete this task to accept the assigned objects.

1. In the object window, accept a job by selecting it in the object window.
2. Click the Approved exit row.
   The administrator might modify these text fields:
   - **Impact Analysis Status**

     Through a visual assist, various values may be assigned to indicate the status (for example Accept / Completion).
   - **Percent Complete**

     A percent completed may be assigned to indicate the progress of analyzing the object.
3. Click the OK button to return to the Impact Analysis - Object View Screen.
4. Click the Close button to return to the main screen (SU Impact Analysis Master)

Viewing SARs

Complete this task to view relevant SARs.

1. Click the SAR View row.
   Select one of these options:
   - **New SARs delivered**

     List new SARs available in the software update.
   - **All SARs delivered**

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List all SARs in the software update.

- **View Objects associated with each SAR**

   Select this check box if you wish to view objects associated with a specific SAR.

- **Special Instructions exit row**

   List any additional details and special instructions that may be associated with a specific SAR.

2. Click the Close button to return to the Impact Analysis SAR View screen.

- **Approved exit row**

   Same as noted earlier.

3. Click the Close button again to return to the SU Impact Analysis screen.

Viewing Control Files in the Software Update

Complete this task to view the Control Files.

1. To access this option, click the Control File View row.

   The Control File View lists all control files in a software update and will indicate the merge options for individual items.

   Select one of these exit row options:

   - Approved

      Same as indicated earlier.

   - Detail

      What specifically has changed within a control file.

2. Click the close button to return to the SU Impact Analysis Master screen

Working with the Scheduler View

Complete this task to view the scheduled merges and table conversions.

1. Click Scheduler View from the exit row.

   The Scheduler viewer lists merges and table conversions that will be performed when the software update is executed.

2. Click the Close button to return to the SU Impact Analysis Master screen.

Working with the Analyze Report

Click the Analyze Report exit row.

This report is a complete summary, in pdf format, of the impact analysis results.

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Working with Object Usage for Software Update Impact Analysis

The Object Usage for Software Update Impact Analysis application has additional information not available on the Software Update Impact Analysis on the development client. The following additional columns exist:

- Customized Objects

  The number of objects in the ESU that have been customized (checked-out/checked-in).

- Used Objects

  The number of objects in the ESU that have a record in the Object Usage Tracking Detail table (F98911) or Object Usage Tracking Summary table (F98902).

- Total Objects

  The total number of objects contained in the ESU.

  > **Note:** You need to execute an Impact Analysis for an ESU to populate the columns. The Used Objects column is populated after Object Usage Tracking is activated in the Object Usage Tracking Configuration (P980042T) application.

The Object Usage View option is only available on the web client version of the Software Update Impact Analysis Master (P96710) application.

To access Object Usage for Software Update Impact Analysis:

1. From the Application Development menu (GH902), select Object Usage Tracking and click Object Usage for Software Update Impact Analysis.
2. Select the Object Usage View from the Analysis Views Row exit to display the Impact Analysis - Object Usage View form.

The form has the following fields and table columns:

ESU Name

The name of the ESU Being analyzed.

Path Code

The path code being analyzed.

Total Objects

The total number of objects contained in the ESU.

Customized Objects

The number of objects in the ESU that have been customized (checked-out /checked-in).

Used Objects

The number of objects in the ESU that have a record in the Object Usage Tracking Detail table (F98911) or Object Usage Tracking Summary table (F98902).

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OMW Object Name

The unique identifie for the object in the ESU.

Last Patched

The last date this object was updated by an ESU in this path code.

Last Patched ESU Name

The name of the last patched ESU.

Object Customized

Checkmark - Object has been customized (checked-out/checked-in).

Last Customized

The date the object was last customized.

User ID

The User ID of who last checked-in the object.

Object Used

Checkmark - Object has been used.

X - Object has not been used.

Grey Ball Icon - Tracking not supported.

Usage Count

The number of times the object has been accessed.

Last Accessed

The date the object was last accessed.

> **Note:** The Used Objects, Object Used, Usage Count, and Last Accessed field are populated after Object Usage Tracking is activated in the Object Usage Tracking Configuration application.

Software Update Impact Analysis Using the Web Client(Release 9.2.8)

After adding/importing an Electronic Software Update (ESU) or a cumulative update (ASU), you can use the Work With Software Update Impact Analysis application (P96710W) to configure and analyze the impact that the software update will have on your system, using the web client.

> **Note:** *Click here to view a recording of this feature.*

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Note: *Click here to view a recording of this feature.*

Note: *Click here to view an OBE of this feature.*

Configuring the Impact Analysis Environment

To configure the impact analysis environment, navigate to the Work With Software Updates application (P96470W), select Form Exit, and then click **Configure Analysis**.

Note: You can also access the Revise Software Update Impact Analysis Tracking Enablement form directly from the Update Manager Process page (Configure Impact Analysis).

In the Revise Software Update Impact Analysis Tracking Enablement form, select the target environment and click **OK**. Note that the Green circle indicates that Object Tracking is enabled for the environment and Red Circle indicates Object Tracking is disabled for the environment. When an ESU is imported into the environment which has object tracking enabled, the system uses this configuration to automatically set up the data for the impact analysis.

Working with Software Update Impact Analysis Tool on the Web (P96710W)

Access the JD Edwards EnterpriseOne Software Update Impact Analysis application:

1. Sign in to JD Edwards EnterpriseOne on the web client.
2. From the Software Updates menu (GH9612), select Software Update Impact Analysis (P96710W).
3. In the Work With Software Update Impact Analysis form, click **Add**. The Impact Analysis Setup form is displayed.
4. Enter the **Software Update Name** (for example *JN12345*) and **Environment Name** (for example *DV920*) and click **OK**.
5. The impact analysis record that was created in the previous step is loaded in the Work With Software Update Impact Analysis form and the analysis process begins in the background.
6. Click **Find** to refresh the page. The analysis results are displayed in the lower pane of the Work With Software Update Impact Analysis form. A list of all the affected objects, delivered bugs, and applied control tables are displayed.

Reviewing the Impact Analysis Results

The JD Edwards system enables you to review the impact analysis results in different views namely, Product Code View, Table Change View, and Summary View.

Impact Analysis Product Code View

In the Work With Software Update Impact Analysis form (P96710W), click Form Exit and select **Product Code View**.

The Impact Analysis Product Code View form is displayed.

You can filter the count of objects affected by the software update, by Product Code, Environment Name or by setting the Query in the Query field. A graphical representation of the object count analysis is displayed in the right pane of the form.

Impact Analysis Table Change View

In the Work With Software Update Impact Analysis form (P96710W), click Form Exit and select **Table Change View**. The Impact Analysis Table Change View form is displayed.

You can filter the table and index changes by Product Code, Environment Name or by setting the Query in the Query field. A graphical representation of the Table and Index change analysis is displayed in the right pane of the form.

Impact Analysis Summary View

In the Work With Software Update Impact Analysis form (P96710W), click Form Exit and select **Summary View**. The Impact Analysis Summary View form is displayed.

You can filter the view by setting the Query in the Query field and review the graphical summary of the affected and replaced objects.

Reviewing the Analysis Views

The Analysis Views provide additional information apart from the software update impact analysis results.

Object Usage View

To access the object usage view for the software update:

1. In the Work With Software Update Impact Analysis form (P96710W), click Row exit, select **Analysis Views** and then select **Object Usage View**. The Impact Analysis - Object Usage View form is displayed.
2. Use this view to filter the records and review the usage of all objects for the selected ESU.

Table Change View

To access the table changes view for the software update:

1. In the Work With Software Update Impact Analysis form (P96710W), click Row exit, select **Analysis Views** and then select **Table Change View**. The Work With Table Change Table form is displayed.
2. Use this view to filter the table change records and review the table changes for the selected ESU.

Index Change View

To access the index changes view for the software update:

1. In the Work With Software Update Impact Analysis form (P96710W), click Row exit, select **Analysis Views** and then select **Index Change View**. The Work With Index Change Table form is displayed.
2. Use this view to filter the index change records and review the index changes for the selected ESU.

Copied Object View

To access the copied objects view for the software update:

1. In the Work With Software Update Impact Analysis form (P96710W), click Row exit, select **Analysis Views** and then select **Copied Object View**. The Impact Analysis - Copied Object View form is displayed.
2. Use this view to filter the copied objects records and review all the copied objects for the selected ESU.

Reviewing Impact Analysis Using the Software Update Dashboard (Release 9.2.8)

The Impact Analysis Dashboard provides a comprehensive interface to visualize the objects and business processes that are updated when a patch is applied to your system.

The data displayed in the Impact Analysis Dashboard is based on the impact analysis configuration setup (see *Configuring the Impact Analysis Environment*) and the impact analysis results (See *Reviewing the Impact Analysis Results*).

Access the Impact Analysis Dashboard from the Update Manager Process Flow page.

The Impact Analysis Dashboard comprises of four components:

- Object Count by Product Code
- Deployment Summary
- Table/Index Changes by Data Source
- Special Instructions Summary
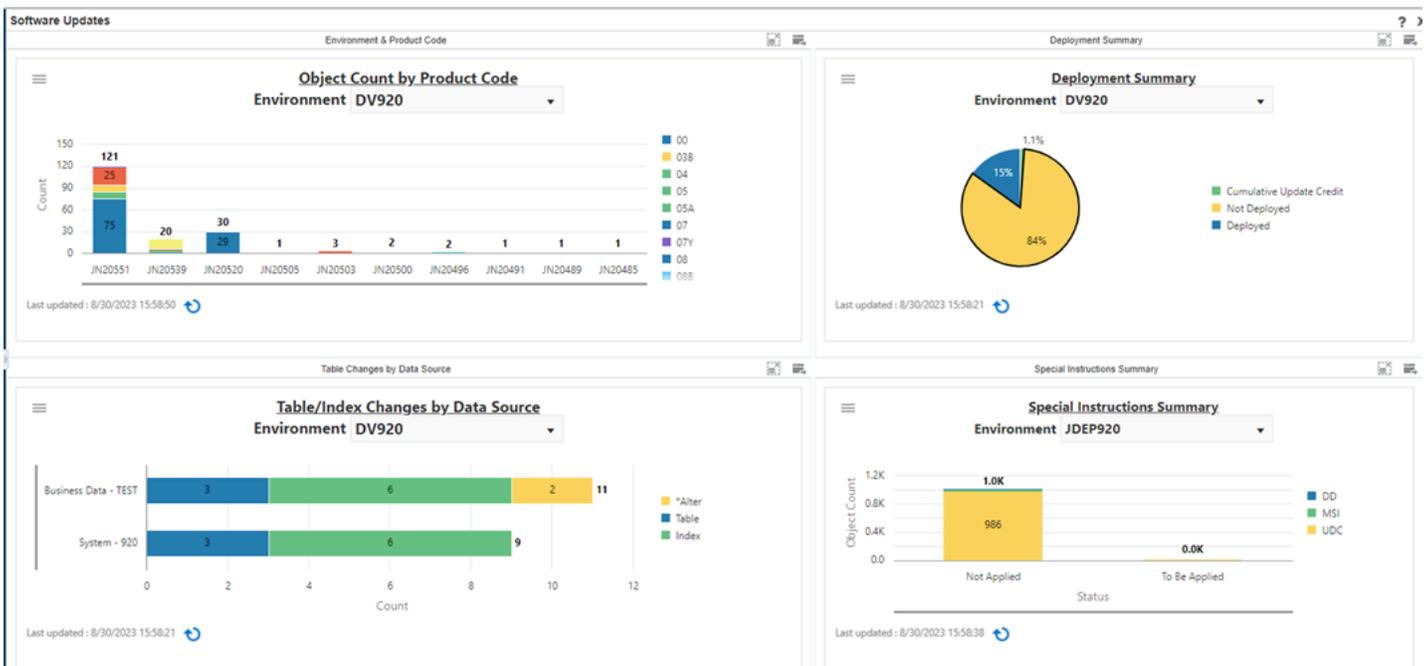
Each of the dashboard components displays a graphical chart that summarizes the view. Click the menu to open the pane with filter criteria. Set the filter/query and click **OK**. The dashboard also provides exportable tabular data for external consumption. You can click the component heading to drill down to the corresponding impact analysis application.

Object Count by Product Code

Use the Object Count by Product Code chart to view object usage totals by product code for the specified environment.

You can use the menu to further filter the data displayed in the chart.

- The Query field allows you to set any of the preexisting queries or, you can create your own query and save it for future use.

- The Product Code field determines the product to which the data pertains.

- The Environment field determines the target environment for the data.

Deployment Summary

Use the Deployment Summary chart to view the deployment summary for the specified environment. The chart details the deployment status of the ESU. Click the Deployment Summary link to drill back to the Impact Analysis Summary View form. This form shows the percentage of replaced objects and for the replaced objects the chart summarizes the percentage of customized, not customized, and copied objects.

You can use the menu to further filter the data displayed in the chart.

- The Query field allows you to set any of the preexisting queries, or you can create your own query and save it for future use.

- The Product Code field determines the product to which the data pertains.

- The Environment field determines the target environment for the data.

Table/Index Changes by Data Source

Use the Table/Index Changes by Data Source chart to view all the table and index changes for the specified environment by product code.

You can use the menu to further filter the data displayed in the chart.

- The Query field allows you to set any of the preexisting queries, or you can create your own query and save it for future use.

- The Product Code field determines the product to which the data pertains.

- The Environment field determines the target environment for the data.

Special Instructions Summary

Use the Special Instructions Summary chart to view the summary of special instructions (DD Glossary, Manual Special Instructions, and UDC Description) applied and to be applied for the ESU in the specified environment.

You can use the menu to further filter the data displayed in the chart.

- The Query field allows you to set any of the preexisting queries, or you can create your own query and save it for future use.

- The Product Code field determines the product to which the data pertains.

- The Environment field determines the target environment for the data.

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10 Using JD Edwards Compare and Merge Tools

Understanding JD Edwards EnterpriseOne Compare and Merge Tools

JD Edwards compare and merge tools enable you to compare two versions of JD Edwards EnterpriseOne objects and non-code objects, such as versions, UDCs, data dictionary items. Tools Release 9.2.4 and later include and merge tools for business views, tables, reports. If you have made custom modifications to business data, forms, or event rules, the compare and merge tools can help you retrofit your changes or verify that they were carried forward to a new release. Furthermore, you can use these tools anytime you want to compare items between two environments.

> **Note:** The compare and merge tools for RDA, business views, and tables require that the JAS.ini, JDBJ.ini, and MergeTools_JAR.jar files reside in the ..System/Classes directory of the development client. If you are using the Oracle Database Client, the tnsnames.ora file must also be present in the ..System/Classes local folder on the development client. These files are copied automatically from the Developer Web Client configuration, if it has been installed.

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:

- Version Compare Report
- User Defined Codes Compare Report
- Data Dictionary Compare Report

> **Note:** JD Edwards provides the report templates and report definitions to produce the Application Configuration Analyzer reports using the JD Edwards EnterpriseOne embedded BI Publisher. For information about the embedded BI Publisher, see *"Introduction to BI Publisher for JD Edwards EnterpriseOne"* in the *JD Edwards EnterpriseOne Tools BI Publisher for JD Edwards EnterpriseOne Guide* .

Version Compare Report

The Version Compare report (R983051N) compares the processing options for interactive versions and batch versions between two environments or data sources. Environment (1) and Data Source (1) are determined from the current sign on environment. You specify Environment (2) or Data Source (2) in a processing option to indicate the environment or data source to use for comparison.

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Before an upgrade, you can compare the versions in the Production and Pristine environments to determine which versions were added, deleted, or changed. After the upgrade, you can use the report to verify that your modifications were carried forward to the new release.

Another way to use the report is as an audit or validation tool. For example, if a version performs as expected in a development environment but not in a production environment, you can use the Versions Compare report to see if there are processing option differences in the two environments.

The comparison report includes both a summary and a detailed section. The detailed section is sorted by system code and object type.

Processing Options

The following processing options enable you to specify the processing for the report.

Environment

1. Enter the Environment (2) that you want to compare.
Specify an environment to compare with the sign on environment. Leave this option blank if you want to compare data sources.

2. Or Enter the Data Source (2) for Versions table F983051.
Specify a data source to compare with the sign on data source. Leave this option blank if you want to compare environments.

Options

3. Enter '1' to display all selected versions.Enter '2' to display only 'Processing Option (PO) Data' that are different.Default is to display all versions that are different.
Use this processing option to display all versions, all versions that are different, or only those where the processing option data is different.

Entering '1' displays all versions, even if there are no differences.

Entering '2' displays batch versions that have different processing option values.

The default (blank) displays:

- Versions that exist in one environment or data source, but not in another.

- Versions with processing option values that are different.

Running the Report

To run the Version Compare report:

1. From the Software Compare Tools (GH96111) menu, select Compare Versions.
2. Enter values for the processing options.
3. Click Submit.

   Note: Do not run multiple instances of the Version Compare report simultaneously. The report uses work table F98881 to build the report data. If two Version Compare reports are running at the same time, the information in the reports will not be accurate.

4. Select options for the report definition, and then click Next.

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5. From Recent Reports on the top menu bar, select Version Compare report.

> **Note:** If the report is not shown in the drop-down list, select View Job Status to monitor the processing of the report.

6. When the report processing is complete, you can view or print the output by selecting either View Job Status or Version Compare report from the Recent Reports menu.

Reading the Report

The Version Compare report identifies differences in the interactive and batch versions between two environments or data sources. Based on the processing options that you select, the report will identify the following:

- Versions that exist in one environment or data source, but not in the other.
- Processing option values that are different in the compared versions.

Report Components

The cover page of the report shows the report title, the date and time of the report, the data sources that were compared, and the report level of detail that was selected.

The report contains the following components:

- Processing Option Data Changed - Summary by System Code (table)
- Version Differences Detail (horizontal bar graph and table)
- Report summary (text)

Summary by System Code

The summary section displays a table that summarizes the number of versions without processing option data changes, the number of versions with processing option data changes, and the total number of versions for each system code.

Versions Differences Detail

The detail portion of the report is grouped by system code. At the beginning of each system code section, a horizontal bar chart shows the total number of versions with processing option data differences and without processing option data differences in that system code.

Each version with differences has a table with the following columns:

Column Heading	Description
Result	Describes the result of the comparison. Values are: Only In: The version is only in the location shown in the Data Src column. Different: The versions in the two locations are not identical. PO Data Differ: The version processing option values are different.
Data Src	Data Location (1) or (2)
Version	Version Name An example of a version name is XJDE0001 or VER0003.

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Column Heading	Description
Version Title	Version Title An example of a version title is "Mailing Labels for the Eastern Region."
Security Flag	Values are: 0 - No Security 1 - Medium Security 2 - Medium to Full Security 3 - Full Security
Option Code	Values are: Blank - Disables the processing options for the version. 1 - Blind Execution. The application will use existing processing options without prompting the user. 2 - Prompt for Values. The application will prompt the user for processing options at run time
Check Out Status	Indicates whether the version is checked out in Object Management Workbench. Values are Y or N.
Version Availability	Values are: Y - The version is available for use from the server. N - The version is not available for use from the server.
Processing Option Template Name	Processing Option Template Name An example of a processing option template name is T0018P.
PO Data Differ (Y/N)	Processing Option Data Difference Indicates whether there are differences in the processing option values in the compared versions. Values are Y or N.

Note: To change processing option values shown on the Version Compare report:

- For batch versions, use the Batch Versions (P98305W) application.

- For interactive versions, use the Interactive Versions (P983051) application.

Report Summary

The summary at the end of the report displays the names of the environments or data sources that were compared and the F983051 table mappings. Also included is a record count with the following information:

- Total number of versions selected in each data source.
- Total number of versions that are only in one data source or the other.
- Total number of versions that are different.
- Total number of versions with processing option data that is different.

Compare Terms

The terms used in the report are defined as follows:

Term	Definition
Only in (1)	Version is only in Data Source (1)
Only in (2)	Version is only in Data Source (2)
Different	Version in Data Source (1) and (2) are not identical.
PO Data Differ - Y	Version processing option values are different.

User Defined Code Compare Report

  The User Defined Code Compare report (R960004N) displays differences in the user defined codes (UDCs) in two environments or data sources. Environment (1) and Data Source (1) are determined from the current sign on environment. You specify Environment (2) or Data Source (2) in a processing option to indicate the environment or data source to use for comparison. If data sources are compared, the F0004 User Defined Code Types and F0005 User Defined Codes tables must exist in both data sources for the comparison to succeed.

Before an upgrade you can compare the UDCs in the Production and Pristine environments to determine which UDCs were added, deleted, or changed. After the upgrade, you can use the report to verify that your UDC modifications were carried forward to the new release.

Another way to use the report is as an audit or validation tool. For example, if a UDC performs as expected in a development environment but not in a production environment, you can use the User Defined Code Compare report to see if there are UDC differences in the two environments.

The comparison report includes both summary and detailed sections. The detailed section is sorted by system code, and then by UDC type, such as 01/ST.

Processing Options

The following processing options enable you to specify the processing for the report.

Environment

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1. Enter the Environment (2) that you want to compare.

Specify an environment to compare with the sign on environment. Leave this option blank if you want to compare data sources.

2. Or Enter the Data Source (2) for User Defined Code (UDC) tables.

Specify a data source to compare with the sign on data source. Leave this option blank if you want to compare environments. If you are comparing the UDCs in data sources, Data Source (2) must contain the F0004 and F0005 UDC tables.

Options

3. Enter '1' to display all selected UDCs.Default is to display all UDCs that are different.

Entering '1' displays all UDCs, even if there are no differences.

The default (blank) displays:

- ○ UDCs with different values.
- ○ UDCs that exist in one environment, but not in the other.

Running the Report

To run the User Defined Code Compare report:

1. From the Software Compare Tools (GH96111) menu, select Compare User Defined Codes.
2. Enter values for the processing options.
3. Click Submit.

   Note: Do not run multiple instances of the User Defined Code Compare report simultaneously. The report uses work table F98881 to build the report data. If two User Defined Code Compare reports run at the same time, the information in the reports will not be accurate.

4. Select options for the report definition, and then click Next.
5. From Recent Reports on the top menu bar, select User Defined Codes Compare report.

   Note: If the report is not shown in the drop-down list, select View Job Status to monitor the processing of the report.

6. When the report processing is complete, you can view or print the output by selecting either View Job Status or User Defined Code Compare report from the Recent Reports menu.

Reading the Report

The User Defined Code Compare report identifies differences in the UDCs between two environments or data sources. Based on the processing options that you select, the report will identify the following:

- UDCs that exist in one environment or data source, but not in the other.
- UDCs with different field values.

Report Components

The cover page of the report shows the report title, the date and time of the report, the data sources that were compared, and the report level of detail that was selected.

The report contains the following components:

- Summary by User Defined Code Types (horizontal bar graph).
- Differences by Product Code (table).

- Report summary (text and table)

Summary by Product Code

A horizontal bar graph at the beginning of the report displays the percentage of UDC differences in each product code.

Differences by Product Code

The Differences by Product Code portion of the report is grouped by product code. Only the product codes with UDC differences display on the report. Under each product code section are UDCs with differences (grouped by UDC, such as 01/PH). A table for each UDC or UDC value with differences shows the differences that were found.

For example, an entire UDC, such as 01/PH, could exist in one environment or data source, but not in the other. Or, if the UDC exists in both locations, some of the code values could be different. For instance, the BUSN code within the 01/PH UDC shown in the following example could be missing in one location or have a different value for one of its fields, such as Description 01.

This is an example of a UDC:

Each UDC with differences displays a table showing the values for the UDC and for any codes within the UDC with differences.

The following columns are shown for the UDC:

Column Heading	Description
Result	The Result column indicates that the UDC has differences.

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Column Heading	Description
Product Code	The UDC's product code.
Code Types	The UDC type, which is a code that identifies the table that contains user defined codes. For example, for UDC 01/PH the type is PH.
Description	The UDC description.
Code Length	The maximum length of UDC code values.
Second Line (Y/N)	Determines if the Select User Defined Code form will display a second line of description. Valid values are: • Y - Enables the second line of description. • N - Enables the Select User Defined Code form to display only one line of description.
Numeric (Y/N)	Determines whether a user defined code is numeric or alphanumeric. Valid values are: • Y - Indicates that the code is numeric and should be right-justified. • N - Indicates that the code is alphanumeric and should be left-justified.

The following columns are shown for the UDC codes:

Column Heading	Description
Result	The Result column displays one of these values: • UDC Codes Different (<1 or 2>) • UDC Codes Only in (<1 or 2>) The 1 or 2 value indicates in which environment or data source the difference was found.
Product Code	The UDC's product code.
Code Types	The UDC type, which is a code that identifies the table that contains user defined codes. For example, for UDC 01/PH the type is PH.
UDC Codes	The code values within the UDC with differences.
Description 01	Values that are different for the Description 01 field are shown in this column.
Description 02	Values that are different for the Description 02 field are shown in this column
Special Handling	Values that are different for the Special Handling field are shown in this column.

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Column Heading	Description
Hard Coded Y/N	Values that are different for the Hard Coded field are shown in this column.

> **Note:** Use the User Defined Codes (P0004A) application to change UDCs and UDC values.

Report Summary

The summary at the end of the report shows the environment or data sources that were compared and the F0004 and F0005 UDC table mappings. Additionally, the report displays a table with the following information for each location:

- Total UDCs (F0004) selected in Data Source (1) and Data Source (2).
- Total UDCs (F0004) only in Data Source (1) and Data Source (2).
- Total UDCs (F0004) that are different.
- Total UDCs (F0005) selected in Data Source (1) and Data Source (2).
- Total UDCs (F0005) only in Data Source (1) and Data Source (2).
- Total UDCs (F0005) that are different.

Compare Terms

The terms used in the report are defined as follows:

Term	Definition
Only in (1)	The UDC is only in Data Source (1)
Different	The UDC in Data Source (1) and (2) are not identical.
Only in (2)	The UDC is only in Data Source (2)

Data Dictionary Compare Report

The Data Dictionary Compare report (R969200N) compares data dictionary items between two environments or data sources. Environment (1) and Data Source (1) are determined from the current sign on environment. You specify Environment (2) or Data Source (2) in a processing option to indicate the environment or data source to use for comparison.

Before an upgrade, you can compare the data dictionary items in the Production and Pristine environments to determine which items were added, deleted, or changed. After the upgrade, you can use the report to verify that your modifications were carried forward to the new release.

Another way to use the report is as an audit or validation tool. For example, if a data dictionary item performs as expected in a development environment but not in a production environment, you can use the Data Dictionary Compare report to see if the items in the two environments are different.

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The report includes both a summary and a detailed section. The detailed section is sorted by system code, and then by the item alias name within each system code.

Processing Options

The following processing options enable you to specify the processing for the report.

Environment

1. Enter the Environment (2) that you want to compare.

Specify an environment to compare with the sign on environment. Leave this option blank if you want to compare data sources.

2. Or Enter the Data Source (2) for Data Dictionary tables.

Specify a data source to compare with the sign on data source. Leave this option blank if you want to compare environments.

The data dictionary tables that will be used for comparison are F9200, F9203, F9207, F9210, and GT92002.

Options

3. Enter '1' to display all selected DD items.Default is to display all DD items that are different.

Entering '1' displays all selected DD items, even if there are no differences.

The default (blank) displays:

- o Data dictionary items with different values.
- o Data dictionary items that exist in one environment, but not in the other.

Running the Report

To run the Data Dictionary Compare report:

1. From the Software Compare Tools (GH96111) menu, select Compare Data Dictionary.
2. Enter values for the processing options.
3. Click Submit.

   Note: Do not run multiple instances of the Data Dictionary Compare report simultaneously. The report uses work table F98881 to build the report data. If two Data Dictionary Compare reports run at the same time, the information in the reports will not be accurate.

4. Select options for the report definition, and then click Next.
5. From Recent Reports on the top menu bar, select Data Dictionary Compare report.

   Note: If the report is not shown in the drop-down list, select View Job Status to monitor the processing of the report.

6. When the report processing is complete, you can view or print the output by selecting either View Job Status or Data Dictionary Compare report from the Recent Reports menu.

Reading the Report

The Data Dictionary Compare report identifies differences in the data dictionary tables between two environments or data sources. The following data dictionary tables are compared:

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Table Name	Description
F9200	Data Item Master
F9203	Data Item Alpha Description
F9207	Error Message Information
F9210	Data Item Specifications
GT92002	Data Dictionary Glossary

Based on the processing options that you select, the report will identify the following:

- Data dictionary items that exist in one environment or data source, but not in the other.

- Values which are different in the compared data dictionary items.

Report Components

The cover page of the report shows the report title, the date and time of the report, the data sources that were compared, and the report level of detail that was selected.

The report contains the following components:

- Summary by Product Code (horizontal bar graph)

- Data item differences (detail tables)

- Report summary (text and table)

Summary by Product Code

The summary displays a horizontal bar graph showing the number of data items with differences in each product code in two environments or data sources. The summary is followed by a detail section, which displays detailed information about the items in both locations.

Data Item Differences

The detail section for each product code is sorted by data item aliases. The section consists of a table for each item, which displays the item differences. The information shown in the table differs, depending on whether the data dictionary item is a regular data item or a glossary data item.

Note: If the data item exists only in Environment (2) or Data Source (2), the report lists the item but does not display a detail section for the item.

For more information, see "Understanding the Data Dictionary" in the *JD Edwards EnterpriseOne Tools Data Dictionary Guide* .

Glossary Data Items

Each glossary item with differences has a table with the following columns:

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Column Heading	Description
Result	Describes the result of the comparison.
	DD: The glossary data dictionary items in the two locations are different.
Glossary Group	The glossary group assigned to the glossary data item in the Data Item Master (F9200) table.
	The most common glossary groups for glossary data items are E, H, X, or Y, although other types are available.
Product Code	The product code assigned to the glossary data item in the Data Item Master (F9200) table.
Product Code Reporting	The product reporting code assigned to the glossary data item in the Data Item Master (F9200) table.
Error Message	Error message tab for F9207.
Program Name	Program name (FRPGM) in F9207.
Error Level	The error level assigned to the glossary data item in the Error Message Information (F9207) table
	Values are:
	• 1 - Error Message
	• 2 -Warning Message
	• 3 - Information Message
Item Glossary	Item Glossary tab for F9203
Data Item	Data Item (FRDTAI) for DD Alpha Descriptions F9203
Language	Language (FRLNGP) in F9203
Product System Code	System Code (FRSYR) in F9203
Scrn/Rpt	Screen Name (FRSCRN) in F9203
Alpha Description	The description assigned to the glossary data item in the Data Item Alpha Description (F9203) table.
Generic Text Key	The glossary data dictionary item's Generic Text Key.
Glossary Text Change	Indicates differences in the glossary text.
	Values are:
	• A - Glossary text is only in Data Source (1).
	• Y - Glossary text in Data Source (1) and (2) are not identical. (Yes, there is a change)
	• N - Glossary text in Data Source (1) and (2) are the same. (No changes)

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> **Note:** To access the values for glossary data items, select any of the following Data Dictionary Design (GH951) menu selections:
>
> - Work with Data Dictionary Items (P92001).
>
>   Select Glossary Data Item from the Form menu.
>
> - Error Messages (P92002).
>
> - Workflow Messages (P92002).
>
> - Processing Option Glossaries. (P92002)

Regular Data Items

Each regular data item with differences has a table with the following columns:

Column Heading	Description
Result	Describes the result of the comparison. Values are: - Only in (<location>): The data dictionary item is only in the location shown. Values are (1) or (2). - Different: The data dictionary items in the two locations are different.
Glossary Group	The glossary group assigned to the glossary data item in the Data Item Master (F9200) table. Values are: C, D, K, S, E.
Product Code	The product code assigned to the data item in the Data Item Master (F9200) table.
Product Code Reporting	The product reporting code assigned to the data item in the Data Item Master (F9200) table.

The second portion of the table displays the values for the data item in the two environments or data sources being compared. The table shows the data item values for the following categories:

- Item Specifications
- Default Value
- Visual Assist
- Edit Rule
- Display Rule
- Next Number
- Item Glossary

The table, with a side-by-side comparison of the field values in the two locations, enables you to verify all field value differences.

> **Note:** To access the values for regular data dictionary items, select Work with Data Dictionary Items (P92001) from the Data Dictionary (GH951) menu.

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Report Summary

The report summary displays the names of the environments or data sources that were compared and the data dictionary table mappings in both locations. Also included is a record count for the following tables:

- Data Item Master (F9200)
    - Total number of data items selected in each data source.
    - Total number of data items that are only in Data Source (1) or Data Source (2).
    - Total number of data items that are different.

- Data Item Alpha Description (F9203)
    - Total number of data items selected in each data source.
    - Total number of data items that are only in Data Source (1) or Data Source (2).
    - Total number of data items that are different.

- Data Dictionary Glossary (GT92002)
    - Total number of data items that are only in Data Source (1) or Data Source (2).
    - Total number of data items that are different.

- Error Message Information (F9207)
    - Total number of data items selected in each data source.
    - Total number of data items that are only in Data Source (1) or Data Source (2).
    - Total number of data items that are different.

- Data Item Specifications (F9210)
    - Total number of data items selected in each data source.
    - Total number of data items that are only in Data Source (1) or Data Source (2).
    - Total number of data items that are different.

Compare Terms

Term	Definition
Only in (1)	DD is only in Data Source (1)
Different	DD in Data Source (1) and (2) are not identical.
Only in (2)	DD is only in Data Source (2).
A	DD Glossary Text is only in Data Source (1).
Y	DD Glossary Text in Data Source (1) and (2) are not identical. ('Y' means that there is a change)
N	DD Glossary Text in Data Source (1) and (2) are the same. (N means that there is no change)

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Term	Definition

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. When you install an ESU containing UDC Description and Glossary changes, an XML file is extracted to the Special Instructions folder on the deployment server and is located in the following directory: ..\E900\SpecialInstructions. The Visual Compare for UDC Descriptions and Glossary Tool, application P96472, is run from an administrative client workstation within JD Edwards EnterpriseOne and applies the changes to the current environment. You must have installed the Planner Update, which contains Software Action Request (SAR) 7481054, completed the special instructions, and built and deployed your package.

To apply DD glossary and UDC description changes:

1. In the Fast Path, enter **P96472.**
2. On Work With Special Instructions, click Add.

   On Search and Select Special Instructions, in the Server Share Path field, the path to the Deployment Server special instructions folder appears as the default.
3. If you have moved the folder or if the appropriate folder does not appear, click the browse button, navigate to the directory that contains the XML file, and select the directory. Click Find.
4. In the grid, click the appropriate ESU, and then click Select.

   The data from the new ESU is imported and the application returns to the Work With Special Instructions form. The new ESUs appear in the grid. The Work With Special Instructions form appears. The ESUs appear in the grid.
5. Select the appropriate ESU.
6. Select one of the following options from the Row menu:
   - Accept: Select this option if you want to accept all updates in the ESU without reviewing them.
   - Reset Status: Select this option to change the status from **Applied** to **Not Applied** or from **Reviewed** to **Not Applied.**

     Three types of statuses are available:

Status	Description
Applied	Applied status appears if you have applied everything contained in the ESU. If you have applied parts of the ESU, but not all, then this status will not appear.
Not Applied	This status appears if you have not applied any of the ESU contents.
Reviewed	This status appears if you have looked at the ESU but not applied any of its contents.

Status	Description

7. Select the UDC Description Option to access the Work with UDC Description Changes form. This option is enabled only if the ESU contains changes to UDC descriptions.

   The UDCs are grouped by product code and appear in a list underneath the Available UDC Items folder. Only those UDCs that have different descriptions from the ones that already reside in your current environment appear.

8. You can select individual UDCs, multiple UDCs, or all UDCs. To select all UDCs, click the top-level node located under the Available UDC Items folder. Clicking any node selects all of the UDCs beneath it. To accept the UDC descriptions, click Accept.

9. You can opt to view all UDCs in the ESU by clicking the All items option. Or, you can opt to view only those items that have not already been reviewed by clicking the Non Reviewed Items option.

10. Click the double-arrow button to accept the UDC description of the currently selected UDC.

11. Select the DD Glossary option to access the Work with DD Glossary Changes form. This option is enabled only if the ESU contains changes to DD glossaries.

   The DD items are grouped by product code and appear in a list underneath the Special Instructions folder. Only those DD items that have different glossaries from the ones that already reside in your current environment appear.

12. You can select individual DD items, multiple DD items, or all DD items. To select all DD items, click the top-level node located under the Special Instructions folder. Clicking any node selects all of the DD items beneath it. To accept the DD glossaries, click Accept.

13. You can opt to view all glossaries in the ESU by clicking the All items option. Or, you can opt to view only those items that have not already been reviewed by clicking the Non Reviewed Items option.

14. Click the double-arrow button to accept the DD glossary of the currently selected DD.

15. Select the Preceding ESU option to view a summary of changes previously applied but also contained in the selected ESU.

16. Select the SARs Related option to view all SARs in the selected ESU containing text changes for UDCs and glossaries.

Managing Special Instructions (UDCs and DD Glossaries) Using the Web Client (Release 9.2.8)

The Manage Special Instructions application (P964720W) enables you to review, compare, and apply text updates for User Defined Codes (UDCs) and Data Dictionary Glossaries, using the web client.

UDC values and DD Glossary text are two typical types of special instructions that are evaluated during the software update process. A side-by-side comparison of the new and old text values, enables you to review and choose whether to accept the changes.

When you upload an ESU containing UDC description and glossary changes through web deployment into the update repository, the system automatically imports Manual Special Instructions (MSI) XML from the package into the staging area.

The Manage Special Instructions web utility P964720W enables you to compare the UDC value and Data Dictionary Glossary text existing in your system with the proposed changes that are included in the software update.

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> **Note:** *Click here to view a recording of this feature.*

> **Note:** *Click here to view a recording of this feature.*

> **Note:** *Click here to view an OBE of this feature.*

Working with Manage Special Instructions (P964720W)(Release 9.2.8)

This section discusses how to:

- Download an ESU with special instructions from the Oracle JD Edwards Update Center.
- Import the ESU using the web client.
- Apply UDCs and DD Glossaries changes to the staging environment.
- Deploy the ESU with special instructions edits to the target environment.

Downloading the ESU with Special Instructions from the Update Center

To download the Electronic Software Update file (ESU) from the Update Center:

1. Access the Oracle JD Edwards Update Center.
2. In the Search section, enter the ESU name in the Search for Name field and click **Search** OR set these criteria and click **Search**:
   a. In the Type field, select `Electronic Software Updates.`
   b. In the Release field, select `9.2.`
   c. In the Platform field, select `Multi-platform.`
3. Review the search results. Select and download the ESU with special instructions to your Download Basket.

   > **Note:** The description of the multi-platform ESUs is suffixed with *web*. For example, `ESU_JN19899_7/19/22_web`. Only these ESUs can be deployed using the web client.

4. Click **Items** link in the Download Basket section and click the download icon corresponding to the ESU you downloaded.

Importing the ESU to EnterpriseOne Using the Web Client

To import the ESU using the web client:

1. Sign in to EnterpriseOne on the web client.
2. From the Software Updates menu (GH9612), select the Work With Software Updates application (P96470W).
3. Select the Form exit and click **Import**.
4. Click **Choose File** and access the downloaded file. Only one ESU can be imported at a time.
5. Click **Load**. The file is uploaded to the system. The Work With Software Updates (P96470W) application refreshes with the new ESU in the grid and the deployment process is initiated.

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6. The system then populates the Software Update Status window on the screen which displays a visual of the deployment status highlighting the current deployment step and the percentage of update remaining.

> **Note:** If the Software Update Status window does not appear, select **Software Update Status History** from the Layout drop-down menu.

When the deployment process is 38% complete, the ESU is loaded and is ready for deployment.

Applying UDC and DD Glossary Changes to the Staging Environment

To apply UDC and DD Glossary changes to the staging environment:

1. From the Software Updates menu (GH9612), select **Work with Software Update** application (P96470W). The **Work with Software Updates** form is displayed.
2. Click **Find**.
3. In the records grid, click the **Special Instructions** icon in the row corresponding to the ESU that you imported.

    The Manage Special Instructions form is displayed with the record of the selected ESU. The manual special instructions, User Defined Codes, and Glossaries from the selected ESU package are displayed in the corresponding tabs, in the lower pane of the Manage Special Instructions form.
4. To make edits for UDCs in the staging environment (`JDEP920`):
    a. Click the **User Defined Codes** tab. The available UDCs are listed by product code in the grid with their status set to *Not Applied*.
    b. Review and set the Status of each of the required UDCs to *Applied*. These changes will be applied automatically during the deployment process.

      > **Note:** To skip applying a UDC, set the status of the UDC to *Skipped*.

5. To make staged edits for glossaries in the staging environment (`JDEP920`):
    a. Click the **Glossaries** tab. The available glossaries are listed by product code in the grid with their status set to *Not Applied*.
    b. Review and set the Status of the required glossaries to *Applied*. These changes will automatically be applied during the deployment process.
6. Click **OK**.

Deploying the ESU with Special Instructions Edits to the Target Environment

After making edits to the UDCs and DD Glossary items in the staging environment, deploy the ESU to apply the changes to the target environment.

1. In the Work With Software Updates form (P96470W), select the ESU and click Row Exit, **Deploy**.
2. In the Software Update Environment Selection form, select the target environment, example `PS920`.
3. If you have made staging edits detailed in the *Applying UDC and DD Glossary Changes to the Environment* section above and only want those changes to be deployed, deselect the **Automate Special Instructions** option.

    > **Note:** To apply all the special instructions provided by JD Edwards, select the **Automate Special Instructions** option.

4. Click **OK**. The system initiates the deployment process. The Software Updates Status pane on the Work with Software Updates form shows the percentage of progress. On completion of deployment, the 100% completion status is displayed.
5. After the deployment is completed, click the Special Instruction icon corresponding to the staging environment `JDEP920`, in the records grid.

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6. The Manage Special Instruction form displays the ESU with the target environment `JDEP920` in the Records grid. The Status of the target environment is set to *Applied*.

7. Select the target environment (example `PS920`) in the grid and review the UDC and DD Glossary changes in the lower pane of the form.

   a. To review the applied UDCs, click the **User Defined Codes** tab.

   b. Select **Display All Statuses** option to view all the UDCs. The status of the applied UDCs is replaced with a check mark in the grid.

   c. To review the applied DD glossaries, click the **Glossaries** tab.

   d. Select **Display All Statuses** option to view all the glossaries. The status of the applied glossaries is replaced with a check mark in the grid.

8. To apply special instruction changes after deployment to all the deployed target environments:

   a. Select the staging environment from the Manage Special Instructions form.

   b. In the **User Defined Codes** tab, edit the status of the UDCs as required.

   c. Click **Apply to all target environments** (Save icon) in the **User Defined Codes** tab.

   d. In the **Glossaries** tab, edit the status of the DD glossary items as required.

   e. Click **Apply to all target environments** (Save icon) in the **Glossaries** tab.

   > **Note:** When the Apply to all target environments option is selected, the system evaluates the status at these levels:
   >
   > ○ The status set for the UDC and DD Glossary items in the staging environment.
   >
   > ○ The status of the target environment.
   >
   > ○ The status set for the UDC and Glossary items in the target environment.
   >
   > The skip status set in any of these evaluation levels takes precedence during processing.

9. To apply special instructions edits to a deployed target environment:

   a. Select the target environment (example `PS920`) in the Manage Special Instructions records grid.

   b. Click the Status of the selected target environment to unlock the editing status from *Applied* to *Not Applied*.

   c. In the **User Defined Codes** tab, click the Status of the UDCs to make changes as required.

   d. Click Apply (Save icon) in the **User Defined Codes** tab to apply the UDC changes to the selected target environment (`PS920`).

   e. In the **Glossaries** tab, click the Status of the glossary items to make changes as required.

   f. Click **Apply** (Save icon) in the **Glossaries** tab to apply the DD Glossaries changes to the selected target environment (`PS920`).

JD Edwards EnterpriseOne FDA Compare

This section contains the following topics:

- *Understanding FDA Compare*
- *Understanding the FDA Compare Color Scheme*

- *Using FDA Compare*

Understanding 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.

Understanding the FDA Compare Color Scheme

FDA Compare uses colors and letters to highlight the differences between the source and target objects. This table lists the default colors and their meanings:

Color	Meaning
Black	The object exists in both the source and target and is the same in both versions.
Red	The object exists in both the source and target but is not the same in both versions.
Green	The object exists only in the target.
Blue	The object exists only in the source.

In the form workspace, the controls that differ between the versions are marked with a symbol in a color indicating the type of change. When you click a control, the browsers highlight the changes in specific property values with the same color coding. To change the color scheme, select View, User Options.

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> **Note:** Nodes in the Application Tree View browser appear in a color if one or more of their children are different. Therefore, while the node itself may not be different, you will find that an object is different when you navigate deeper into the tree.

Using FDA Compare

This section discusses how to merge specifications using FDA Compare.

Forms Used To Use FDA Compare

Form Name	FormID	Navigation	Usage
Select Source Object	NA	Form Design Aid, File, Compare Mode	Enable or disable compare mode (toggle). When you enable compare mode, the system prompts you to identify the application that you want to use as the basis for the comparison.

Merging Specifications Using FDA Compare

To merge specifications using FDA Compare:

1. In FDA, open the target application.

   This is the application that you have been working on or that your company uses. It is the version of the application that you might want to change when you compare it to the source, which is a base version of the application.
2. Select a source application (the one to use as the basis for the comparison).
3. To change the view properties in the source or target property browser, select one of these options from the drop-down menu at the bottom of the pane:

   o All

      Displays all the properties and values in alphabetic order for the object including the translation properties.
   o Standard

      Displays only the standard properties in alphabetic order.
   o Translation

      Displays only the translation properties in alphabetic order.
4. Compare the source application properties (on the left) to the local target properties (on the right).
5. To merge properties from the source object to the target object, right-click in the property source property browser and select Merge to Target from the menu.

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JD Edwards EnterpriseOne ER Compare

This section contains the following topics:

- *Using JD Edwards ER Compare for Applications and Event Rules*
- *Working with JD Edwards 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.

Using JD Edwards ER Compare for Applications and Event Rules

This section provides an overview of the JD Edwards ER Compare user interface and discusses how to start JD Edwards ER Compare.

Understanding the JD Edwards ER Compare User Interface

JD Edwards ER Compare is a utility that enables you to compare an application on the local workstation (target application) to the source applications defined in:

- The central objects data source of any defined path code.
- A TAM specifications directory.
- An ESU backup.

You can compare applications, reports, table conversions (TC), business functions (BSFN), table event rules (TER), and business services (BSSVs) using the ER Compare User Interface.

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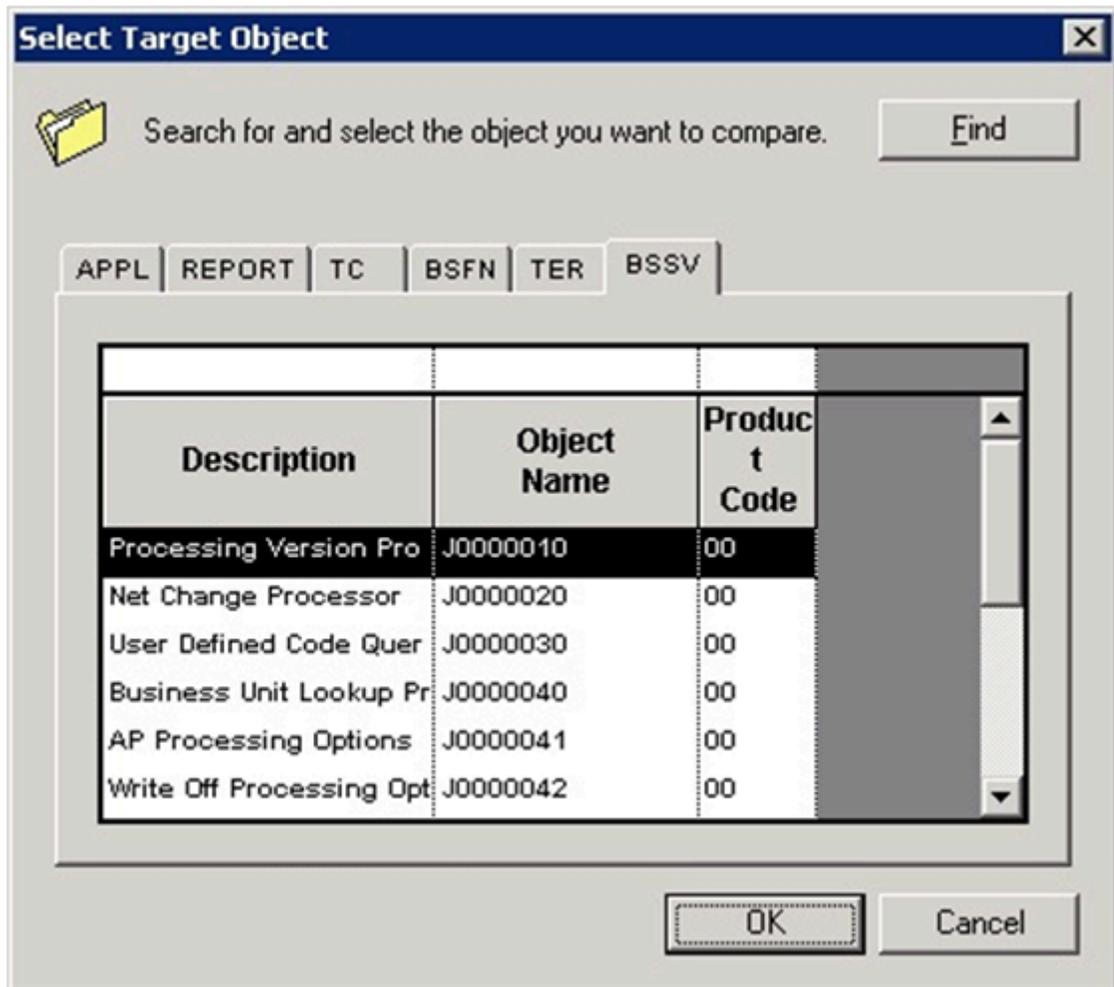
When you start JD Edwards ER Compare, a tree-structured outline of the application appears on the left. You can change source locations with the Select Source command under the File menu.

Expand an event node in the tree to display a split window that shows the source ER on the left and corresponding target ER on the right. The ER on the right belongs to your local specifications.

The program indicates differences in color, while identical lines are normally displayed in black. Disabled lines are marked with an exclamation point. You can customize the color coding by selecting the Set Colors command from the View menu.

JD Edwards ER Compare normally displays ID numbers and technical details about the currently selected item in two small windows on the status bar. The window on the left annotates the source specification while the window on the right annotates the target specification. This information is superfluous in most cases, and can be deactivated with the Show Object IDs switch under the View menu.

The tool lets you compare a modified application to the original version of that application on the server. JD Edwards ER Compare provides a side-by-side, visual comparison of the event rules for the two applications. Moreover, JD Edwards ER Compare enables you to modify the target ER (your local version) by copying lines directly from the source application. You can also move, remove, and disable ER lines in the target application. To copy all eligible lines in the current event from source to target, use the Copy All command. To copy all eligible lines in every event from source to target, use the Auto Merge Application command in the Edit menu.

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To refresh the comparison, click the Refresh button. A warning message saying 'the source and target specifications are about to refresh, any unsaved changes will be lost' is displayed when you click the refresh button. You can click OK or Cancel as required.

To validate your changes before saving, select the Validate Event Rules command from the File menu. A validation will automatically occur before you exit the tool if you have saved changes.

Starting JD Edwards ER Compare

JD Edwards ER Compare can be started from FDA or directly from OMW.

When JD Edwards ER Compare starts, a window appears. On this window, entitled Select the Location of Source Specifications, select one of these locations:

- Central Objects Path Code

  Enter the server location of the source object (the object to which you want to compare the local ER).

- Remote Specifications Location

  Enter the TAM location of the source object (the object to which you want to compare the local ER). ESUs are delivered in a TAM package, so use this method to compare the local ER to an object packaged in an ESU.

- Software Update Backup

  After applying a software update, use this tool to retrofit custom ER from the customized copy on the ESU backup.

Note: Starting JD Edwards ER Compare under FDA freezes all other programs running on your system, including FDA itself. Finish your work in JD Edwards ER Compare and then exit ER Compare to restore normal operation. The purpose of this action is to prevent two programs from potentially modifying the same set of specifications at the same time.

Working with JD Edwards ER Compare

Use the application tree view to identify and display specific application and ER components that have changed. If a parent node is identified as having changed, expand it to see which of its children are different. Expand an event in the tree structure to display its associated code. You can display more than one event at a time.

You can change the target ER with JD Edwards ER Compare. You can also print the ER.

Changing the Target ER

Perform any of these actions to change the target ER:

Task	Details
To copy selected lines from source to target	Select the lines to copy and then select Copy Right.
To copy all lines in the current event	See *Merging ER in a Single Event*.

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Task	Details
To copy all lines in the application	See *Merging ER in the Entire Application*.
To delete selected lines from the target	Select the lines to delete, and then click Delete.
To enable or disable selected lines in the target	Select the lines to enable or disable, and then select Enable/Disable ER.
To undo the previous command	Select Undo.
To redo the previous command	Select Redo.
To reload the last saved version of the specifications	Select Refresh.

Each command is available from the Edit menu and tool bar.

Note: Use the Shift key to select multiple, contiguous lines and the Ctrl key to select multiple, noncontiguous lines.

When you are copying ER, JD Edwards ER Compare checks ER variable references before copying and automatically fixes nonmatching variable IDs. Not only does JD Edwards ER Compare perform validity checking on ER variables, which are present in almost every ER statement, but it also does many other types of validity checking.

CAUTION: Although JD Edwards ER Compare provides validity checking, which eliminates the largest source of invalid ER, you must still be vigilant when using JD Edwards ER Compare. When JD Edwards ER Compare copies ER statements, it does not check all of the object references in those statements. If the ER statements reference objects that do not exist in the target specifications or objects that have different IDs in the source and target specifications, JD Edwards ER Compare may allow the copy operation, which results in invalid ER. Different control IDs are very common for controls or objects that were not in the base version of the application. Controls that were added at separate times to separate versions of the application usually have different control IDs.

When you save changes, your local application specifications are updated. JD Edwards ER Compare prompts you to save before either of these operations:

- Exit
- Select new source location

Printing

You can use the Print command to place a copy of the target ER in a text file. JD Edwards ER Compare will generate the text file and open it in your default text editor. You can then print the ER from the text editor.

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Merging ER in a Single Event

The Copy All command copies ER lines from the source to the target, but only within the currently displayed event. The command will not delete lines from target ER if they do not exist in the source location. The command also does not necessarily copy all lines. It does not copy lines that would produce any of these types of invalid ER:

- Duplicate variables.

- Unbalanced IF and ENDIF statements.

- Unbalanced WHILE and ENDWHILE statements.

- Statements referencing an ER variable that is not defined in the target application.

- Statements referencing an ER variable that is defined differently in the target application.

Merging ER in the Entire Application

The Auto Merge Application command resides under the Edit menu. It lets you copy ER lines from all events in the source application to the corresponding events in the target application. It works like the Copy All command, but it works on all events at once. The command will not delete lines from target ER that do not exist in the source location. The command also attempts to avoid copying lines that would result in invalid ER.

As with any JD Edwards ER Compare command, you might create invalid ER by using the Auto Merge Application command. As of version 8.98, JD Edwards ER Compare attempts to protect you from this by disabling unsafe operations. For example, JD Edwards ER Compare prevents the accidental creation of references to undefined ER variables. However, it does not recognize references to other kinds of undefined objects. Follow the steps recommended earlier to ensure that your ER remains valid.

Regardless of how you modify the ER, you should validate event rules prior to saving. This command is found under the File menu. If any ER violations occur, delete the offending lines and use Edit Event Rules to reenter them after you have exited JD Edwards ER Compare.

JD Edwards EnterpriseOne RDA Compare (Release 9.2.4.3)

This section contains the following topics:

- *Understanding RDA Compare*,
- *Using RDA Compare*,

Understanding RDA Compare

The Report Design Aid (RDA) Compare tool in Oracle's JD Edwards EnterpriseOne Batch Application Design enables you to compare and merge one report to another of the same name. You can compare the details of reports to determine if objects have been added, deleted, or rearranged and whether the properties have changed.

This is useful when you have made modifications to an EnterpriseOne report and you upgrade, you can compare the base report to its new counterpart.

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Use RDA 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 use the RDA Compare tool to validate and implement your customization.

RDA Compare will compare the following attributes:

Report

Compares the report interconnect templates.

Section

Only sections with the same section Id are compared. If a section does not have the same type (columnar or group) or business view, it and all child fields will be marked as protected.

- Section Size
- Section Properties
- Color
- Data Sequencing

Field

Fields with the same Id in a section are compared to each other. Fields with different DDICT and/or different data types with the same Id will show differences, and are marked protected.

- Field Properties
- Total Types
- Field Style
- Display Length
- Display Decimals
- Edit Code
- Justification
- Display Styles
- Field Position

  Note: In columnar section comparisons, field position differences are not marked as different as they are re-sorted and repositioned upon merge from a source to a target and are almost always different because of this.

- Font Format
- Field Color
- Text Override

Note: Table Conversions, tabular reports, reports with database mappings are not compared.

Using RDA Compare

This section discusses how to compare and merge specifications using RDA Compare.

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To compare and merge specifications using RDA Compare:

1. Navigate to Object Management Workbench (OMW) from a JD Edwards Development Client.
2. Check out the object to be the target. The target object should always be a copy of the object received in an ESU or Applications Update.
3. Click the OMW Design button, click the Design Tools tab and then click the RDA Compare button.
4. In the Spec Compare Manager, click the Select Source button. The source objects should be the object version that has been customized.
5. Select the location of the source object under Object Location.

   Source objects may be selected from:

Location	Fields
Central Objects	Path Code Select the path code. Object Name Select the object name.
Local	Path Code Select the path code. OMW Project (Optional) Select the OMW Project Filters projects for which you are a member. Specifications come from E1Local Object Name Select the object name.
Object History	Path Code Select the path code. Object Name Select the object name. Changed Date Displays the date the object was last modified. Object Release

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Location	Fields
	Displays the JD Edwards EnterpriseOne application release.
Package	Path Code Select the path code. Package Name Select the name of the full package build. Object Name Select the object name.
Development Save	SAVE Path Code Select the path code. Save Object Name Select the object name.
file System .par File	PAR File Name Select the file system .par file. Value must include the full path and can be a .par or .zip file.

6. Click the OK button to accept the selection and return to the Spec Compare Manager.

The selected object version will be extracted from the location and validated. This may take some time depending on the size and location of the object.

> **Note:** It is not recommended to merge a source report to a target report that is not the same report or copy of the same report. Doing so may result in specifications that are not runnable. RDA Compare tool does not prevent you from doing this, however, if you try this, always back up your report specifications to a PAR file from OMW so they can be restored.

7. Click the Compare button to display object differences.

The Compare Specifications form displays with the Source on the left pane and Target on the right pane.

The Compare Specifications form enables you to compare and merge the specification differences between the specifications.

The report name row is highlighted in blue. The rows with red text illustrate where the reports are different. Some rows with differences are not selectable and are protected from merge, and the reason why will be

displayed in the cell text of the protected object (or, if the object is a field, in the cell text of its parent section object).

8. Click the OK button to save the merged specifications and exit.

> **Note:** When a new section is merged into a report that did not previously contain that section, the new section Data Selection will be merged in addition to the above mentioned items. When merging a report, section, or field that has event rules on an event which does not have event rules in the target report the event rules will be copied from the source to the target. When the target event already has event rules, and the event rules are not identical, there will be text in the compare cell indicating that the user must also run Event Rule Compare after merging in the Report Compare Tool to also merge any differences in event rules.

JD Edwards EnterpriseOne Business View Compare (Release 9.2.4)

This section contains the following topics:

- *Understanding Business View Compare*,
- *Using Business View Compare*,

Understanding Business View Compare

The Business View Compare tool in Oracle's JD Edwards EnterpriseOne Business View Design enables you to compare one business view to another to identify. The Compare Specifications form displays the differences in columns and joins. You can compare the details of business views to determine if columns have been added, deleted, and whether the properties have changed.

This is useful when you have made modifications a business view and you upgrade, you can compare the business view to its new counterpart and merge the specification differences.

Use Business View 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 use the Business View Compare tool to validate and implement your customization.

Using Business View Compare

This section discusses how to compare and merge specifications using Business View Compare.

To compare and merge specifications using Business View Compare:

1. Navigate to Object Management Workbench (OMW) from a JD Edwards Development Client.
2. Check out the object to be the target. The target object should always be a copy of the object received in an ESU or Applications Update.
3. Click the Business View Design button, click the Design Tools tab and then click the BSSV Compare button.
4. In the Spec Compare Manager, click the Select Source button. The source objects should be the object version that has been customized.

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5. Select the location of the source object under Object Location.

Source objects can come from the following locations:

Location	Fields
Central Objects	Path Code Select the path code. Object Name Select the object name.
Local	Path Code Select the path code. OMW Project (Optional) Select the OMW Project Filters projects for which you are a member. Specifications come from E1Local Object Name Select the object name.
Object History	Path Code Select the path code. Object Name Select the object name. Changed Date Displays the date the object was last modified. Object Release Displays the JD Edwards EnterpriseOne application. release.
Package	Path Code Select the path code. Package Name

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Location	Fields
	Select the name of the full package build. Object Name Select the object name.
Development Save	SAVE Path Code Select the path code. Save Object Name Select the object name.
file System .par File	PAR File Name Select the file system .par file. Value must include the full path and can be a .par or .zip file.

6. Click the OK button to accept the selection and return to the Spec Compare Manager.

The selected object version will be extracted from the location and validated. This may take some time depending on the size and location of the object.

7. 7. Click the Compare button to compare the specifications.

The Compare Specifications form displays with the Source on the left pane and Target on the right pane.

The Compare Specifications form enables you to compare and merge the specification differences between the two selected objects. You can select Source lines and copy them to the Target.

The table definition row is highlighted in blue. The columns that are different, but protected are in red text. The source rows with red text, representing tables, columns, or joins and red background, you can copy to the target.

8. Click the Ok button to save the merged specifications and exit.

Note: Business View Compare also merges dependent rows when merging certain elements. For example, merging a source join will also merge the source column and source table if they are not already part of the target specifications. Another example is merging a source table causes the source join and source join-column to be merged if they are not already part of the target specifications.

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JD Edwards EnterpriseOne Table Compare (Release 9.2.4)

This section contains the following topics:

- *Understanding Table Indices Compare*,
- *Using Table Indices Compare*,

Understanding Table Indices Compare

The Table Compare tool in Oracle's JD Edwards EnterpriseOne Table Design enables you to compare the indexes from one table to another. You can compare and merge missing indexes or index columns. Table Compare does not merge missing data columns of the table.

Use Table Compare to see the index changes in a table between a software update and the pristine or current implementation. If you have performed a number of customized modifications, you can use the Table Compare tool to validate and implement your customization.

Using Table Indices Compare

This section discusses how to compare and merge indexes using Table Compare.To compare and merge specifications using Table Compare:

1. Navigate to Object Management Workbench (OMW) from a JD Edwards Development Client.
2. Check out the object to be the target. The target object should always be a copy of the object received in an ESU or Applications Update.
3. Click the OMW Design button, click the Design Tools tab and then click the Table Compare button.
4. In the Spec Compare Manager, click the Select Source button. The source objects should be the object version that has been customized.
5. Select the location of the source object under Object Location.
   Source objects can come from the following locations:

Location	Fields
Central Objects	Path Code Select the path code. Object Name Select the object name.
Local	Path Code

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Location	Fields
	Select the path code. OMW Project (Optional) Select the OMW Project Filters projects for which you are a member. Specifications come from E1Local Object Name Select the object name.
Object History	Path Code Select the path code. Object Name Select the object name. Changed Date Displays the date the object was last modified. Object Release Displays the JD Edwards EnterpriseOne application. release.
Package	Path Code Select the path code. Package Name Select the name of the full package build. Object Name Select the object name.
Development Save	SAVE Path Code Select the path code. Save Object Name Select the object name.

Location	Fields
file System .par File	PAR File Name
	Select the file system .par file.
	Value must include the full path and can be a .par or .zip file.

6. Click the OK button to accept the selection and return to the Spec Compare Manager.

   The selected object version will be extracted from the location and validated. This may take some time depending on the size and location of the object.
7. Click the Compare button to compare the specifications.

   The Compare Specifications form displays with the source on the left pane and Target on the right pane.

   The Compare Specifications form enables you to compare and merge the specification differences between the two selected objects. You can select source lines and copy them to the target.

   The table definition row is highlighted in blue. The source rows that are different, but protected are in red text. The Source rows with red text, representing indexes and red background, you can copy to the target.
8. Click the Ok button to save the merged specifications and exit.

Note: Table Compare does not automatically generate the indexes; it only changes the specifications for the table indices. The table indices and associated header files must be generated through the design tools after the Table Compare merge is complete. The index ids may get changed during the merge process and while the tool attempts to maintain the index ids, the same maintenance steps associated with introducing new indices must be implemented to ensure EnterpriseOne functions properly (for example, New header files must be generated, new indices must be generated and any code relying on the changed indices must be modified or re-built to incorporate the index changes). To minimize the number of index id changes, perform all table index merges in a single compare and merge session.

Customization Object Analyzer

This section contains the following topics:

- *Object Dataload*,
- *Release Level Dataload*
- *Object Customization Summary Report*
- *Object Customization Detail Report*
- *Import and Configure Reports and Data Models*
- *Object Customization Summary Interactive Report*
- *Object Customization Detail Interactive Report*
- *Pathcode Comparison Summary Interactive Report*

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- *Pathcode Comparison Detail Interactive Report*

- *Pathcode Comparison Summary Report*

- *Pathcode Comparison Detail Report*

- *Troubleshooting Information and Tips*

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, allows for a smoother and more predictable upgrade of the EnterpriseOne software. This section details the impact of an upgrade of the EnterpriseOne software on custom objects and custom modifications to standard EnterpriseOne objects.

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) loads the F98881CU table in a parent-child hierarchy of object changes with a list of all JD Edwards EnterpriseOne customized objects.

- R9840RLS (Release Level Object Dataload) - This Data Load UBE takes the Cross Release Pathcodes as input from User from the Processing Options. The Input from the Processing Option can be selected from the Visual Assist. Once the Cross Release Pathcodes are selected and the UBE is submitted to execute, this UBE will load the data into 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) creates a summary report from the data in the F98881CU table.

- RD9840RD (Object Customization Detail Report - BI Publisher) 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) creates a summary and detail report from the data in the F98881CU table.

- R9840R|ZJDE0005 (Object Customization Summary Version) creates a summary report on all of the objects from the data in the F98881CU table. This Summary report can be used to compare the Customized objects across pathcodes.

- R9840R|ZJDE0006 (Object Customization Detail Version) creates a Detail report on all of the objects from the data in the F98881CU table when executed without Dataselection. This version can also be run with Data Selection to get the Detail report on selected objects.

- R9840R|ZJDE0007 (Object Customization Summary Version By Pathcode) - This version takes two pathcodes as input from processing Options and will generate a Summary report only for the selected Pathcodes from Processing Options. This Summary report can be used to compare the Customized objects across pathcodes.

  Note: For the pathcodes which will be entered in the Processing Options in the R9840R|ZJDE0007 summary report, data should be loaded for those pathcodes using the DataLoad UBE.

Note: JD Edwards provides the RD9840RS and RD9840RD report definitions and report templates to produce the summary and detail reports using the JD Edwards EnterpriseOne embedded BI Publisher. BI Publisher reports are only available for E812 and later releases. For information about the embedded BI Publisher, see *"Introduction to BI Publisher for JD Edwards EnterpriseOne"* in the *JD Edwards EnterpriseOne Tools BI Publisher for JD Edwards EnterpriseOne Guide* .

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Objects Captured and Not Captured for Customizations

Currently the APPL, UBE, BSFN, DSTR, BSVW, TBLE object types are captured and all other types of objects are not captured. This table lists what specifically is and is not captured within these object types:

Object Type	Captured	Not Captured
APPL	For applications, the details about the Form Events, Control Events, Grid Column events, Controls and Grid Columns that are added or changed. New objects list all the details, even the hidden items like columns, controls and events.	Event Rule changes. Changes in BSFN call from an application, like BSFN parameter changes.
UBE	In UBE templates, changes related to Section Events and Control Events that are newly added or changed. New objects list all the details, even the hidden items like columns, controls and sections.	Event Rule changes.
UBE Versions	Changes related to section events, newly added controls, Control Event changes and Version Overrides.	Event Rule changes.
BSFN	Newly added business functions and the BSFN name and function name that are added.	Changes to the C code. BSFN Parameter changes.
DSTR	Only the data structure name and description.	Internal details of the DSTR variable that are added or changed, but the report displays that the data structure has changed.
BSVW	Only the business view name and description.	Internal details of business view changes, but the report displays that the business view has changed.
TBLE	Existing table new column additions, Indexes and Table Events.	Event Rule changes.

Object Dataload

EnterpriseOne records when an object is created or modified (an object is considered modified when it is checked in, regardless of whether or not changes were made). This customization information is loaded into the F98881CU table by using the R9840DL UBE. A processing option value needs to be set prior to running this UBE.

> **Note:** R9840DL will typically be run by the administrator.

Processing Options

The following processing options enable you to specify the processing for the data load:

- Enter 0 or Blank to load the data according to data selection without deleting the other existing records where load will occur after deletion based on data selection.

- Enter 1 to delete all of the existing records from the F98881CU table and load the data still based on data selection.

> **Note:** Setting the processing option value to 1 means that you want to clean up all of the loaded data and reload it with the default data selection or data selection based on the user 's needs.

Data Selection Options

Users running this UBE need to identify the objects that were added or existing objects that have been changed. The default ZJDE0001 version that is shipped with the template R9840DL is set with the default data selection. This data selection loads the F98881CU table with all of the object types for all path codes into the F98881CU table.

Running the Object Dataload

To run the R9840DL Object Dataload UBE:

1. From the Software Compare Tools (GH96111) menu, select Object Dataload.
2. Enter values for the processing options.
3. Enter values for the Data Selection.
4. Click Submit.

Running the Object Dataload Using Batch Versions

To run the R9840DL Object Dataload UBE using Batch Versions:

1. Fast Path to BV.
2. Enter R9840DL. Select the ZJDE0001 version.
3. Enter values for the processing options.
4. Enter the values for the Data Selection.
5. Click Submit.

Release Level Dataload

EnterpriseOne records when an object is created or modified (an object is considered modified when it is checked in, regardless of whether or not changes were made).

Prerequisite for Release Level Dataload

The following configuration must be done on the development client where the Release Level Dataload UBE will execute:

1. The F00941 table should contain the entries for the Source and Target pathcodes providing all the information regarding the Environment, Pathcode, Release, etc. for which the USER wants to run the Release level Data load UBE.
   For example, if the USER wants to run the Release Level Dataload for pathcodes DV900 and DV910, the F00941 table should contain entries for the DV900 and DV910 pathcodes with their corresponding Environments and Releases.

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If the entry for the Source and Target pathcode with their corresponding Environment and Release is not available, then it can be created using the P0094 application.

The following screen captures show examples from the F00941 table displaying the entries for the DV910 and DV900 Pathcodes.

2. The Environments of the Source and Target Pathcodes from the F00941 table should have the entries for the following tables with their corresponding Datasources in OCM, in system and Server Map Datasource:

   ○ F9860
   ○ F9861
   ○ F9862
   ○ F00941
   ○ F9202
   ○ F983051

The following screenshots display the DV900WIN and DV910WN environments with the tables and their corresponding datasource mappings and Object Status.

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DV900WIN					
Environment	**Object Name**	**Object Type**	**Primary Data Source**	**System Role**	**Object Status**
DV900WIN	F00941	TBLE	System - 900	*PUBLIC	AV
DV900WIN	F00942	TBLE	System - 900	*PUBLIC	AV
DV900WIN	F9202	TBLE	Data Dictionary - 900	*PUBLIC	AV
DV900WIN	F983051	TBLE	Versions - DV900	*PUBLIC	AV
DV900WIN	F9860	TBLE	Object Librarian - 900	*PUBLIC	AV
DV900WIN	F9861	TBLE	Object Librarian - 900	*PUBLIC	AV
DV900WIN	F9862	TBLE	Object Librarian - 900	*PUBLIC	AV

DV910WN					
Environment	**Object Name**	**Object Type**	**Primary Data Source**	**System Role**	**Object Status**
DV910WN	F00941	TBLE	System - 910	*PUBLIC	AV
DV910WN	F00942	TBLE	System - 910	*PUBLIC	AV
DV910WN	F9202	TBLE	Data Dictionary - 910	*PUBLIC	AV
DV910WN	F983051	TBLE	Versions - DV910	*PUBLIC	AV
DV910WN	F9860	TBLE	Object Librarian - 910	*PUBLIC	AV
DV910WN	F9861	TBLE	Object Librarian - 910	*PUBLIC	AV
DV910WN	F9862	TBLE	Object Librarian - 910	*PUBLIC	AV

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Processing Options

This Data Load UBE takes the Cross Release Pathcodes as input from User from the Processing Options. The input from the Processing Option can be selected from the Visual Assist. Once the Cross Release Pathcodes are selected and a UBE is submitted to execute, this UBE will then load the customized data into F98881CU table.

A Processing Option value needs to be set prior to running this UBE.

> **Note:** R9840RLS will typically be run by the administrator.

Release Level Data Load Database Specific Prerequisites:

For Oracle Database:

TNSNAMES.ORA should be manually updated with SID of source and target pathcodes.

For example, if a customer is running the release level data load for DV900 and DV910 pathcodes, make sure the TNSNAMES.ORA file is updated with the SID of both the databases of E9.0 and E9.1.

For Other Databases:

Please make sure that the Data Sources of the Source and Target Pathcodes are created in odbcad32 for the following tables:

- F9860
- F9861
- F9862
- F00941
- F9202
- F983051

Processing Options

The following processing options enable you to specify the processing for the data load.

Enter the Source and Target Pathcodes of Different Releases to load the customized data of these Pathcodes into the F98881CU table. Pathcodes can be selected from Visual Assist.

- Enter **0** or Blank to load the data according to data selection without deleting the other existing records where load will occur after deletion based on data selection.
- Enter 1 to delete all of the existing records from the F98881CU table and load the data still based on data selection.

> **Note:** Setting the processing option value to 1 means that you want to clean up all of the loaded data and reload it with the default data selection or data selection based on the user's needs.

Running the Release Level Dataload

To run the R9840RLS Release Level Dataload UBE:

1. From the Software Compare Tools (GH96111) menu, select Release Level Dataload.
2. Enter values for the processing options.
3. Click Submit.

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Running the Release Level Dataload Using Batch Versions

To run the R9840RLS Release Level Dataload UBE using Batch Versions:

1. Fast Path to BV.
2. Enter R9840RLS. Select the ZJDE0001 version.
3. Enter values for the processing options.
4. Click Submit.

Object Customization Summary Report

RD9840RS (BI Publisher version) and R8940R (Standard Version) are read-only reports that print the information available in the F98881CU table in a usable format.

This report should be run only after running UBE R9840DL, which loads the F98881CU table. Since the RD9840RS and R9840R reports are based on what is loaded in F98881CU via R9840DL, you need to ensure that table F98881CU has been loaded with what you expect to see in the RD9840RS or R9840R report.

Running the R9840R|ZJDE0005 Object Customization Summary Report

To run the R9840R Object Customization Report:

1. Fast Path to P95620.
2. Provide R9840R in Source UBE and click on Find.
3. Select ZJDE0005.
4. Click on Submit.

Running the R9840R|ZJDE0006 Object Customization Detail Report

To run the R9840R Object Customization Report:

1. Fast Path to P95620.
2. Provide R9840R in Source UBE and click on Find.
3. Select ZJDE0006.
4. Click Submit.
5. Provide Data Selection if Detail report is required for selected objects, else run this version without any Data selection which will give the Output for all the objects in F98881CU table.

Running the R9840R|ZJDE0007 Object Customization Summary Report by Pathcode

To run the R9840R Object Customization Report:

1. Fast Path to P95620.
2. Provide R9840R in Source UBE and click on Find.
3. Select ZJDE0007.
4. Click Submit.
5. Provide the Source and Target pathcode in Processing Options. Summary report will be generated only for the provided Source and Target pathcode.

Customizations Summary

The Customizations Summary gives an overview of the impact of customizations to the system, and provides information to estimate the level of effort needed to retrofit the customizations. This summary sees the system as a whole (all of the data in F98881CU) and is not affected by any data selections the user provides before the run.

> **Note:** The quickest way to extract a Summary ONLY report in RD9840RS and the R9840R standard UBE is to give an invalid data selection so that no data is selected. This is shipped with a default *invalid* data selection.

The Customizations Summary section contains the following:

Customizations Summary Statement

The Customizations Summary statement contains embedded values (xx) within a sentence. The sentence reads:

```
System has  xx  customized objects impacting  xx Product Codes.
```

The Customizations Summary statement section contains the following:

Column Heading	Description
System has **xx**	Refers to the unique count of objects that have been customized.
customized objects impacting	These objects could exist in multiple pathcodes and may have many versions.
xx product codes.	This shows the unique count of all Product Codes affected across all pathcodes.

Summary by Pathcode

This section shows all pathcodes affected by customizations and shows the number of objects affected in each pathcode. Remember that the same object might have been customized in multiple pathcodes. Thus, the sum of objects impacted by pathcode might not be equal to the total number of objects customized. The information is presented in horizontal bar chart and table format (RD9840RS) and table format (R9840R).

The Summary by Pathcode section has these columns:

Column Heading	Description
Pathcodes	Shows all pathcodes affected by customizations.
Number of Objects	Shows number of objects affected in each pathcode.

Summary by Object Type

This section shows all object types affected by customizations and shows the number of objects affected for each object type. The summary lists only object types that were affected and not necessarily all EnterpriseOne object types. The information is presented in pie chart format and table format (RD9840RS) and table format (R9840R).

The Summary by Object Type section has these columns:

Column Heading	Description
Object Type	Shows all Object Types affected by customizations.

Column Heading	Description
Number of Objects	Shows number of objects affected for each Object Type.

Summary by Product Code

This section shows all Product Codes affected by customizations and shows the number of objects affected for each Product Code. The information is presented in horizontal bar chart format and table format (RD9840RS) and table format (R9840R).

The Summary by Product Code section has these columns:

Column Heading	Description
Product Code	Shows all Product Codes affected by customizations.
Product Code Description	Shows description of each product code.
Number of Objects	Shows number of objects affected for each Product Code.

Object List

This section shows information for the different types of objects affected by customizations. If the same object was customized in multiple pathcodes, the object is listed twice; one time for each path code it was customized in. This section does not list versions for objects.

The object list has these columns for each object type:

Column Heading	Description
Product Code	Shows all Product Codes affected by customizations.
Pathcode	Shows pathcodes affected by customizations.
Object Name	Shows application affected by customizations.
Object Description	Provides a description of the object.

Customizations Summary R9840R ZJDE0005, ZJDE0007

This Summary report can be used to compare the Customized objects across pathcodes. The sample screen capture below shows the Summary report from ZJDE0005, ZJDE0007.

We can see that P0006 is modified in both the pathcodes. It has 1 as a flag under DV910 and PD910, which says object is modified in both the pathcodes.

- 1 signifies Object changed.

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- 0 signifies Object not changed.

P01012 is changed in DV910 and not changed in PD910.

Pathcodes	DV910	PD910	Total Instances
Application	5	3	8
JF07620 Sowers' Dummy App	1	0	1
P0005S User Defined Code Search and Select	1	1	2
P0006 Business Units	1	1	2
P01012 Address Book	1	0	1
P9603 Assemble Business Services	1	1	2

Object Customization Detail Report

The Customization Detail Report is impacted by data selection. You may choose to see the objects along with customizations details by data selecting on the following criteria: Path Code, Object Name, Object Type and Product Code. Any other data selection might return unexpected results. A new page is created for each object and its version (if applicable for UBEs). The change details are printed until all are listed.

RD9840RD - BI Publisher Report Version

The Customization Detail Report section in RD9840RD has up to five levels of line items. Each level will be indented relative to the previous line level.

Line Item	Description
Object Type	Type of object.

Line Item	Description
Pathcode + Product Code	Shows the pathcode for the Object Type. Shows the Product Code for the Object Type.
Object Name	Shows the Object Name and version.

Running the RD9840RD Detail Report

To run the RD9840RD Object Customization Detail Report:

1. From the Software Compare Tools (GH96111) menu, select Object Customization Detail.
2. Enter the values for the data selection.
3. Click Submit.

R9840R - Standard Report Version

The Customization Detail section in R9840R has these columns:

Column Heading	Description
Object Type	Type of object.
Product Code	Shows all Product Codes affected by customizations.
Pathcode	Shows pathcodes affected by customizations.
Object Name	Shows application affected by customizations.
Object Description	Provides a description of the object.

The objects are listed by Object Type. The details are shown in a parent child hierarchy where the top-most parent is the object, followed by 3 children for each change. The 3 children are listed in Child Component 1, Child Component 2, and Child Component 3 order. Each line in the detail identifies one unique change at the lowest level child for that line.

Running the R9840R Detail Report

To run the R9840R Object Customization Detail Report:

1. Navigate to Batch Versions.
2. Select R9840R.
3. Enter the values for the data selection.
4. Click Submit.

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Import and Configure Reports and Data Models

In order to use interactive reports, Oracle BI Publisher and the JD Edwards EnterpriseOne Data Access Driver need to be installed, and then Interactive reports and data models need to be imported from the Oracle Update Center and then configured.

Installing Oracle BI Publisher and the Data Access Driver

To install Oracle Business Intelligence Enterprise edition (OBIEE) 11g, see: *Oracle® Fusion Middleware Installation Guide for Oracle Business Intelligence 11g Release 1 (11.1.1.5)*.

To install the JD Edwards EnterpriseOne Data Access Driver, see: *JD Edwards EnterpriseOne Tools BI Publisher for JD Edwards EnterpriseOne Guide* .

Importing Interactive Reports and Data Models

Interactive reports and data models need to be imported from the Oracle Update Center and then configured.

To download reports and data models from the Oracle Update Center:

1. Go to the Oracle Update Center.

   https://updatecenter.oracle.com/apps/WebSearch/updatecenter.jsp?action=news&pkgType=06&
2. Select the data model files (.xdmz) and report files (.xdoz) that you want to import.
3. Once you have imported the files, upload the data model files (.xdmz) and report files (.xdoz) to Target Instance.

   To upload the data model file (.xdmz file):

   a. Click on Catalog on the toolbar.
   b. Select any folder where you want to upload this file.
   c. Click on Upload in the Tasks window.
   d. Click the Browse button to find the .xdmz file which you copied from target machine.
   e. After uploading, it will show the data model in that folder. Click on the Edit hyperlink and select a correct data source and save the data model.

   To upload the report file (.xdoz file):

   a. Click on Catalog on the toolbar.
   b. Select the same folder where you saved the data model.
   c. Click on Upload in the Tasks window.
   d. Browse the .xdoz file which you copied from target machine.
   e. After uploading, click on the Edit hyperlink for the report name to open the report in edit mode.
   f. If there is an associated Data Model, it will display next to Data Model in the top left corner under the tab title. If the correct one is not displayed, or if the one displayed is in red letters, then re-associate the

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interactive report with appropriate data model by clicking on the Magnifying Glass on the toolbar, then selecting the correct data model, then click Open, and then click Save.

The associations are:

Report	Data Model
Object Customization Summary	F98881CU_SUMMARY_DM
Object Customization Detail	F98881CU_DETAIL_DM
Pathcode Comparison Summary	F98881CU_PATHCOMP_SU_DM
Pathcode Comparison Detail	F98881CU_DE_DM

Once the data model is associated, it will display on the toolbar in blue letters.

g. Click on View Report on the toolbar to run the report.

Object Customization Summary Interactive Report

The Object Customization Summary Interactive Report consists of three tabs:

- Summary by Object Type
- Summary by Product Code
- Object List

Summary by Object Type tab

The Summary by Object Type tab will display a pie chart that shows the distribution of the object types affected. The first line of the report has a clickable list of pathcodes affected. Clicking on a pathcode will interactively filter the Object Types to show the summary for that pathcode only.

The Object Types available for selection are:

- Application
- Batch Application
- Business Functions
- Business View
- Data Structure
- Table

The Number of Objects table displays the number of object types affected for the selected pathcode or for all pathcodes.

The Object Type Vs Pathcode comparison table is available which tells the impact of each object type in each pathcode.

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The interactive report can be viewed in different formats. In View Report mode, select the View Report icon on the tab toolbar and select a viewing option:

- Interactive
- HTML
- PDF (recommended output type)
- RTF
- Excel
- PowerPoint

Summary by Product Code tab

The Summary by Product Code tab displays a horizontal bar graph that lists the product codes affected. The first line of the report has a clickable list of pathcodes affected. Clicking on a pathcode will interactively filter the Product Codes to show the summary for that pathcode only.

The Number of Objects table lists the number of objects affected for each product code.

The Product Code Vs Pathcode comparison table is also available at the bottom of the page for cross analysis of object types and pathcodes. The table will display the number of objects per pathcode for each product code.

The interactive report can be viewed in different formats. In View Report mode, select the View Report icon on the tab toolbar and select a viewing option:

- Interactive
- HTML
- PDF (recommended output type)
- RTF
- Excel
- PowerPoint

Object List tab

The object list tab has a summary statement that contains embedded values (xx) within a sentence. The sentence reads:

```
System has  xx  customized objects impacting  xx Product Codes.
```

The object list statement section contains the following:

Column Heading	Description
System has **xx**	Refers to the unique count of objects that have been customized.
customized objects impacting	These objects could exist in multiple pathcodes and may have many versions.
xx product codes.	This shows the unique count of all Product Codes affected across all pathcodes.

The Pathcodes Affected section has a list of pathcodes which can be clicked on to filter the report data to that pathcode only.

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The Object Types Affected section has a list of object types which can be clicked on to filter the data shown on the report. It can also be clicked in combination with any other filters available on the page.

A table presents all of the objects affected by customizations (the list will be affected by any filters in effect). The table displays:

- Object Type
- Pathcode
- Product Code
- Object Name
- Object Description

Object Customization Detail Interactive Report

The Object Customization Detail Interactive Report has a Pathcode and Product Code filter on the header which determines which detail information is shown on the page.

After selecting the Pathcode and Product Code, click on Apply to display the details for that combination in the report. Desired objects can be chosen from the Object Name field using the drop down menu. Change details for that object will be listed in a parent child relationship for up to three children.

The interactive report can be viewed in different formats. In View Report mode, select the View Report icon on the tab toolbar and select a viewing option:

- Interactive
- HTML
- PDF (recommended output type)
- RTF
- Excel
- PowerPoint

Pathcode Comparison Summary Interactive Report

The Pathcode Comparison Summary Interactive Report compares two pathcodes for the selected product code. The pathcodes and Product Code are selected at the top of the page. Once the selections are applied, an object list comparing the existence of the object in the chosen pathcodes is displayed along with the total number of instances of the objects.

The interactive report can be viewed in different formats. In View Report mode, select the View Report icon on the tab toolbar and select a viewing option:

- Interactive
- HTML
- PDF (recommended output type)
- RTF
- Excel

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- PowerPoint

Pathcode Comparison Detail Interactive Report

The Pathcode Comparison Detail Interactive Report compares two pathcodes for the selected product code. The pathcodes and Product Code are selected at the top of the page. Once the selections are applied, the user can choose the object he is interested in using the Object Name field drop down object list. Once the object is selected, the detail is shown in table format in a parent child hierarchy with changes displayed for up to three children. The changes in the two pathcodes are grouped at the left showing the changes in each pathcode.

The interactive report can be viewed in different formats. In View Report mode, select the View Report icon on the tab toolbar and select a viewing option:

- Interactive
- HTML
- PDF (recommended output type)
- RTF
- Excel
- PowerPoint

Pathcode Comparison Summary Report

The Pathcode Comparison Summary Report can be accessed by executing the XJDE0005 version of R9840R using Batch Versions (BV). It can also be accessed from the GH96111 menu. No data selection is allowed for this report. An invalid data selection is included by default for this version.

The report output is presented in table format. The pathcodes will be listed as column headings horizontally across the table. The object type will be listed vertically in the left column. The table cell where the object type and pathcode intersect displays the number of instances of the object in each pathcode. A sum of all instances of the object in pathcodes is also available.

Note: The Pathcode Comparison Summary Report is available with Bug# 14767497.

Pathcode Comparison Detail Report

The Pathcode Comparison Detail Report can be accessed by executing the XJDE0006 version of R9840R using Batch Versions (BV). It can also be accessed from the GH96111 menu. This report needs a mandatory data selection for up to 3 pathcodes. The user may add further data selection based on his preference of object type, product code and object name.

This report shows a linear comparison of customizations between pathcodes in a format similar to the regular Object Customization detail report. Each section will report on an object within a pathcode. The first line in the section will display the object type and the associated pathcode. The second line will display a description of the object type. The third line will display the product code. The lines following will display details that are relevant to the object type.

Note: The Pathcode Comparison Detail Report is available with Bug# 14767497.

Troubleshooting Information and Tips

Object customizations are captured based on the SIMRGMOD flag in the F9861 table for each pathcode. A check-out and check-in of an object in OMW flags this column as changed even if the object does not have any changes.

When a new object is created or copied, the flag is set to **A**. When the R9840DL is run with data selection for this object, it is normal for the R9840DL to display the ***Object Customizations data load failed*** and ***No Data selected*** messages.

The R9840DL/ZJDE0001 version is shipped with a default data selection which captures all objects that are added or changed. Any other data selection additions should be added to this default data selection.

If the object has been changed but does not appear in the reports, the issue could be that the object is not checked in. The object must be checked in for the changes to be captured. The SISTCE column set to **1** in F9861 indicates that the object is checked in.

The original UBE template must be checked in for the UBE Version changes or override changes to be reflected in the report.

Changes for object types BSFN, DSTR and BSVW are shown in the Summary report and not in the Detail report.

If for some reason the R9840DL UBE fails to run on the server, you can run this UBE locally from a development client, which should capture the same data.

The R9840R|ZDE0006 version which prints the detail report will fail when the F98881CU data load has a huge amount of data. This issue is fixed in Bug 17195573 in the 9.1.4 Tools Release.

Decustomizer Analysis Report (Release 9.2.3.3)

This section contains the following topics:

- *Overview*
- *Decustomizer Dataload Report*
- *Decustomizer Analysis Report*

Overview

The JD Edwards EnterpriseOne Decustomizer Analysis Report enables you to identify the UI customizations that can be replaced using the personalization and extensibility framework.

A periodic review of the information generated by the report allows you to track the customizations that can be reduced and to stay in sync with the latest updates in JD Edwards EnterpriseOne. Also, you can run this report prior to performing an upgrade to know the number of customizations that can be replaced by using the personalization framework.

The Decustomizer analysis report identifies the customization done to the Application (APPL) EnterpriseOne objects by comparing the application between two path codes, which are the source and target path codes. Ensure that the ESU

level of the source and target path codes that are being compared are at the same level. For more information see, "ESU History (R9672)" in the *JD Edwards EnterpriseOne Tools System Administration Guide*.

For example, the report scans the EnterpriseOne applications in the Production path code, compares the same with the Pristine path code, and stores the information pertaining to the specific UI customizations in the JD Edwards EnterpriseOne table. Also, the source path code should not have any customizations retrofitted in it for the report to identify the customization done to the APPL objects. Note that the target path code is where the customizations are expected to be present.

The Decustomizer analysis report contains information of the customizations pertaining only to the APPL object type. The report identifies the Application objects that have been customized and provides detailed information about them.

The Decustomizer analysis report supports Tools and Applications releases 9.1 and 9.2.

Generating the Decustomizer analysis report is a two-step process. The first step involves running a UBE to load the table. Second step comprises of running a UBE that reads from the table to produce a report in the PDF format.

The UBEs are:

- R9540DC (Decustomizer Dataload Report): It loads the Decustomizer data load table (F98881DC) with a list of all the customized APPL EnterpriseOne objects. The Decustomizer Dataload UBE takes the path codes as input from Processing Options - Pathcode Details. Once the path codes are selected and the UBE is submitted to execute, the UBE scans the central objects specs for the source and target path codes, and loads the data into the F98881DC table in a parent-child hierarchy of object changes with a list of all the customized APPL type of objects.

- R9540DCR (Decustomizer Analysis Report): It creates a summary and detail report from the data in the F98881DC table. The report takes the two path codes as input from Processing Options and generates a report only for the selected path codes.

The following customizations are specifically captured within the APPL EnterpriseOne object type:

- Forms that have hidden fields or fields removed

- Forms that have changed the tab sequence

- Forms that have changed the labels of the form controls

- Forms that have moved the fields

- Forms that have made the form field as mandatory

- Forms that have inserted additional Business View columns

Decustomizer Dataload Report

When an APPL object is customized, EnterpriseOne records the changes in the respective spec repositories. This customization information is loaded into the F98881DC table by using the R9540DC UBE. The processing option values need to be set prior to running this UBE.

Running the Decustomizer Dataload

To run the R9540DC Decustomizer Dataload UBE:

1. Fast Path to BV.
2. Enter R9540DC for Batch Application.
3. Select the Version.
4. In Prompt For, selecy Data Selection.

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> **Note:** If the Data Selection is not specified, the R9540DC UBE will scan all of the APPL objects that are marked as customized.

5. Click Submit.
6. Enter values for Data Selection.
7. Click OK.
8. In Path Code Details, enter the values for the Source and Target path codes.

    You can use the visual-assist button to select the values for path codes. It is mandatory to specify the values for the Source and Target path codes.
9. Enter values for the processing options.

    The following processing options enable you to specify the processing for the data load:
    - Enter 0 or Blank to load the data according to data selection without deleting the other existing records.
    - Enter 1 to delete all of the existing records from the F98881DC table and load the data still based on data selection.

    > **Note:** Setting the processing option value to 1 means that you want to clean up all of the loaded data and reload it with the default data selection or data selection based on the user 's needs.

10. Click OK.
11. In Report Destination, click OK.

After the path codes are selected and the UBE is submitted to execute, this UBE will then load the customized data into F98881DC table.

If there are no UI customizations identified in Target path code when compared against the Source path code (pristine), the F98881DC table will be empty and the data load UBE will display the message: The Decustomizer report found no potential customizations.

Decustomizer Analysis Report

The Decustomizer Analysis Report (R9540DCR) gives an overview as well as a detailed summary of customizations to the Application EnterpriseOne objects. These customizations can be replaced using the personalization framework. R9540DCR is a read-only report that prints the information available in the F98881DC table in a usable format.

This report should be run only after running UBE R9540DC, which loads the F98881DC table. Since the R9540DCR report is based on what is loaded in F98881DC through R9540DC, you need to ensure that the F98881DC table has been loaded with the data you want to see in the R9540DCR report.

Running the Decustomizer Analysis Report

To run the R9540DCR Decustomizer Analysis Report:

1. Fast Path to BV.
2. Enter R9540DCR for Batch Application. Select the Version.

    > **Note:** You can skip the data selection step as the UBE only populates the information available in the F98881DC table.

3. Click Submit.
4. In Report Destination, click OK.

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Decustomizations Summary

The Decustomizations Summary gives an overview of the impact of customizations to the APPL objects. The Decustomizations Summary section contains the following:

Decustomizations Summary Statement

The Decustomizations Summary statement contains embedded values (xx) within a sentence. The sentence reads:

```
System has  xx  customized objects impacting  xx Product Codes.
```

The Decustomizations Summary statement section contains the following:

Column Heading	Description
System has xx	This refers to the unique count of APPL objects that have been customized
customized objects impacting	These objects could have many versions
xx product codes.	This shows the unique count of all Product Codes affected across the selected path codes

Summary by Path Code

This section shows the number of APPL objects affected in the target path code.

The Summary by Path code section has these columns:

Column Heading	Description
Source Path code	Shows the source path code
Target Path code	Shows the target path code
Number of Objects	Shows number of objects affected in the target path code

Summary by Object Type

This section shows the object type affected by customizations and shows the number of objects affected for this object type. The summary lists only the APPL object type that is affected.

The Summary by Object Type section has these columns:

Column Heading	Description
Object Type	Shows the APPL object type affected by customizations
Number of Objects	Shows the number of objects affected for the APPL object type

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Summary by Product Code

This section shows all Product Codes affected by customizations and shows the number of objects affected for each Product Code.

The Summary by Product Code section has these columns:

Column Heading	Description
Product Code	Shows all the product codes affected by customizations
Product Code Description	Shows the description of each product code
Number of Objects	Shows the number of objects affected for each product code

Customized Application Objects

This section lists all the Application objects that have been customized. This section does not list versions for the objects.

The Customized Application Objects list has these columns for each object:

Column Heading	Description
Object Name	Shows the application affected by customizations
Product Code	Shows all Product Codes affected by customizations
Source Path code	Shows the source path code
Target Path code	Shows the target path code
ESU Match Status	Show whether the source and target path codes are at the same ESU level for the specific Application object
Object Description	Shows the description of the object

Customizations Detail Report

The details are shown in a parent-child hierarchy where the top-most parent is the object, followed by each type of change to the APPL objects.

The parent section of the Customization Detail Report has these items.

Column Heading	Description
Object Name	Shows the object name and version

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Column Heading	Description
Description	Shows the description of the object
Product code	Shows the product code for the object
Source Path code	Shows the source path code
Target Path code	Shows the target path code
ESU Match Status	Show whether the source and target path codes are at the same ESU level for the specific Application object

The child section of the Customization Detail report has these columns.

Column Heading	Description
Control Category	Shows the category type
Form Name	Shows the form name
Control Type	Show the type of control
Control Name	Shows the ID of control
Customization Type	Shows the description of each customization

Note:

- Any form control that has simple UI customization along with event rule changes is skipped and a message is logged in jde.log file.

- If the customization involves moving a control that is designated as a tab stop to another tab, changes the tab sequence of both the source tab and target tab pages.

- If the ESU level of the source and target path codes are not at the same level for a specific object, the report might indicate that a given customization is present when it is not (i.e. false positive result).

11 Custom Modifications and Packages

Understanding Custom Modifications and Packages

At this point, you are ready to retrofit your custom modifications into the objects delivered in the update. You may also choose to apply Oracle's suggested UDC description Data Dictionary glossary changes. This portion of the update process may involve several iterations of retrofitting and testing, so you will also be building update packages to deliver the modifications to the testing environments. This chapter also explains how to build and test the packages that you will deploy to the workstations.

> **Note:** As of Tools Release 9.2, customers could perform custom modifications only after the upgrade process. Beginning with Tools Release 9.2 Update 2, customers can retrofit the custom modifications for the objects that are part of the deployed ESU bundle.

If you made a backup of original specifications and business functions, you can restore this backup.

See *Restoring a Backup*.

Identifying Custom Modifications Using the Customization Workbench

The Customization Workbench (P98UCUST) is an application that provides a customer a way of easily identifying and managing the merge of EnterpriseOne customized objects that have been changed in the most recent delivery.

To identify custom modifications using the Customization Workbench:

1. Fastpath to OMW.
2. Create an OMW project. Make sure that you are a developer on this project and that this project is at a development status of **21**.

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3. Use Fastpath to launch P96UCUST.
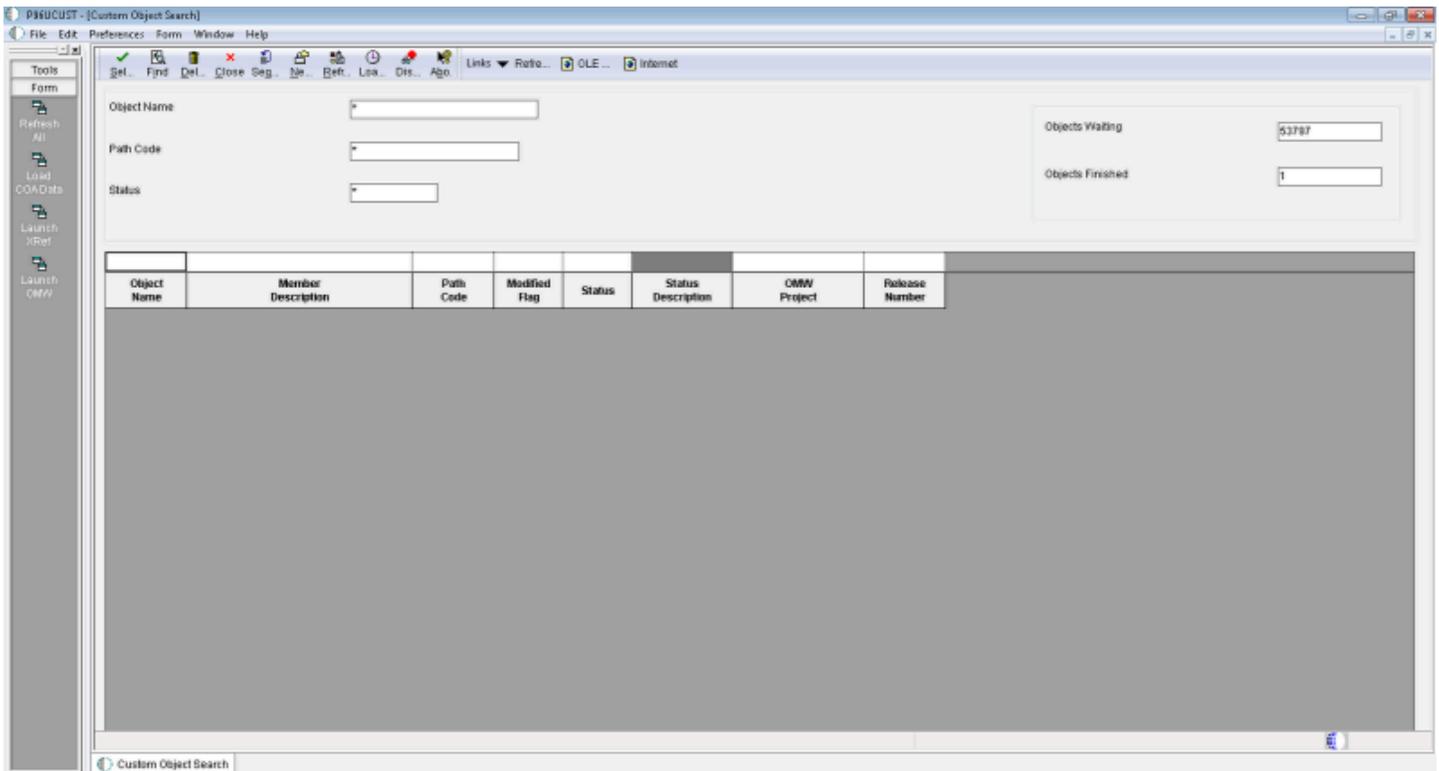
Available Form Exits:

- o **Refresh All** - calls BSFN to refresh the F96UCUST data based on the merge modification flag in the F9861 table.
- o **Load COA Data** - launches batch versions for the Report R9840DL - Object Customizations Data Load Report.
- o **Launch XRef** - will launch the entry point form of the cross reference application in order that the end user may gather more information about the currently checked in object.
- o **Launch OMW** - will Launch OMW (P98220) where more actions can be taken on the object and project as needed.

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4. If the F96UCUST table has been loaded with customization objects information, then click "Find". Otherwise, click the form exit "Load COA Data". This will take a while for the table to load.

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5. The grid will appear with the data. The counters in the form header will indicate how many objects are complete and how many are still in need of review. Select an object from this list.

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6. An OMW Project Search and Select form will appear. Select the project that you will add the objects to. A popup window will appear.

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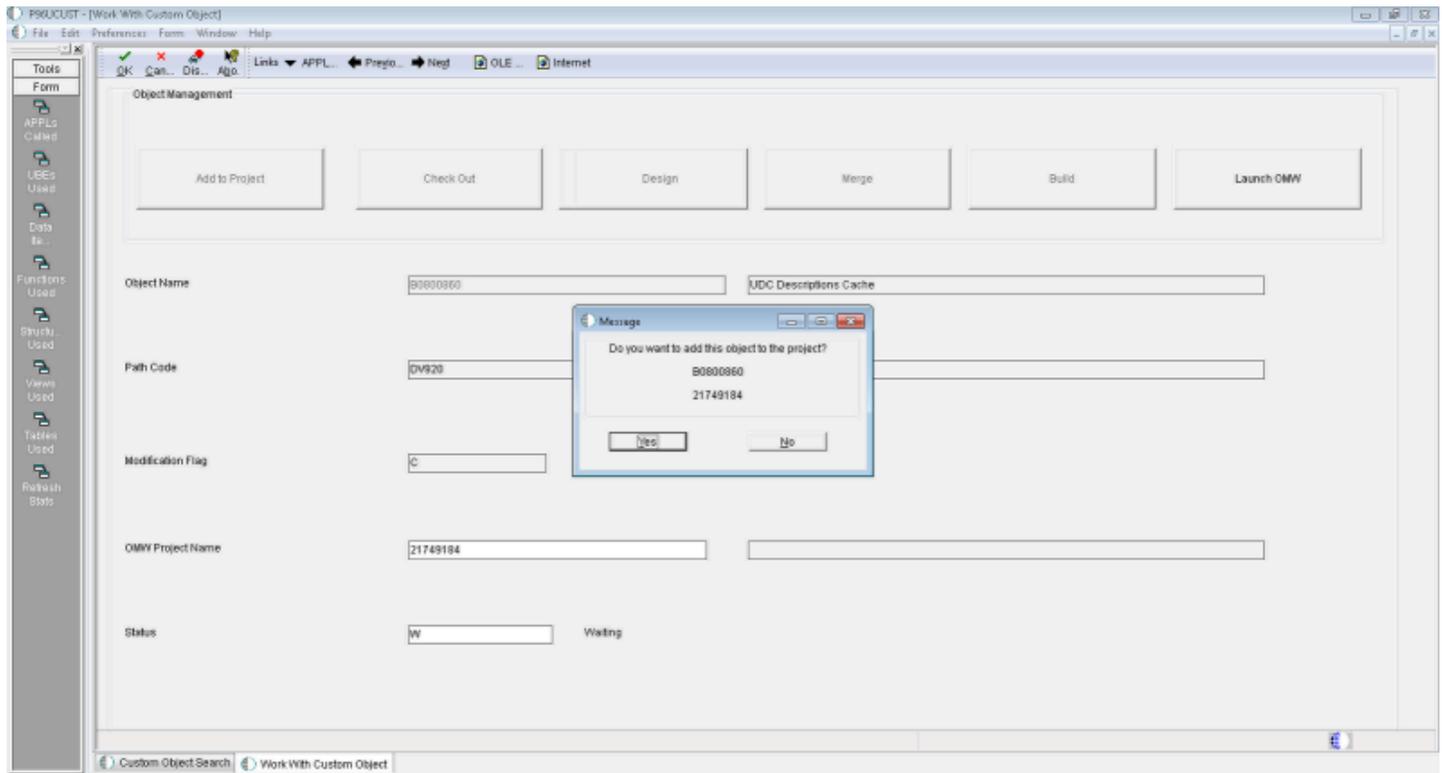
7. Confirm that you want to check out the object to the project. If you choose "No", you will have the option to check out the object later.

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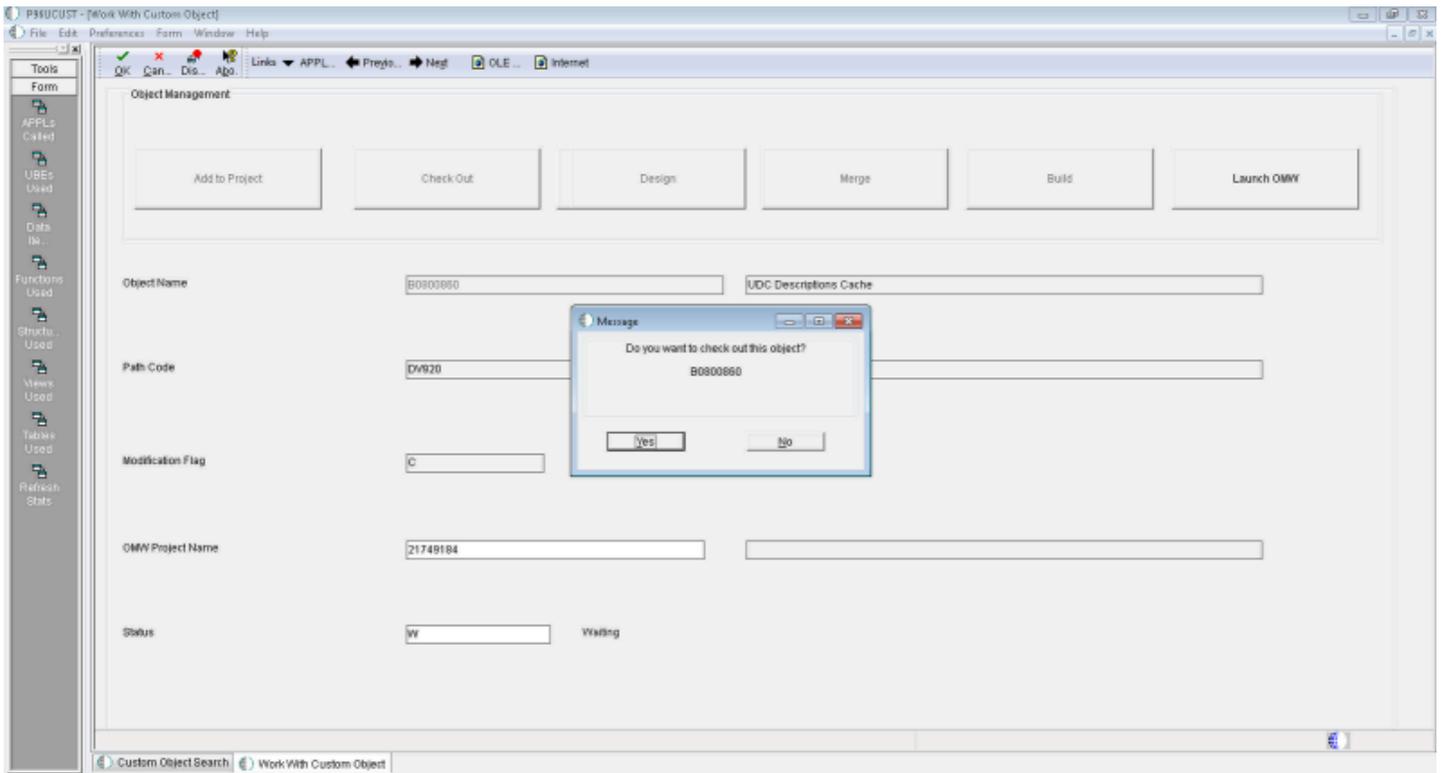
8. Once on the form, there are several options that will change based upon the specific object.

   o Is the object on the project or not?

   o Is the object checked out or not?

   o What is the object type?
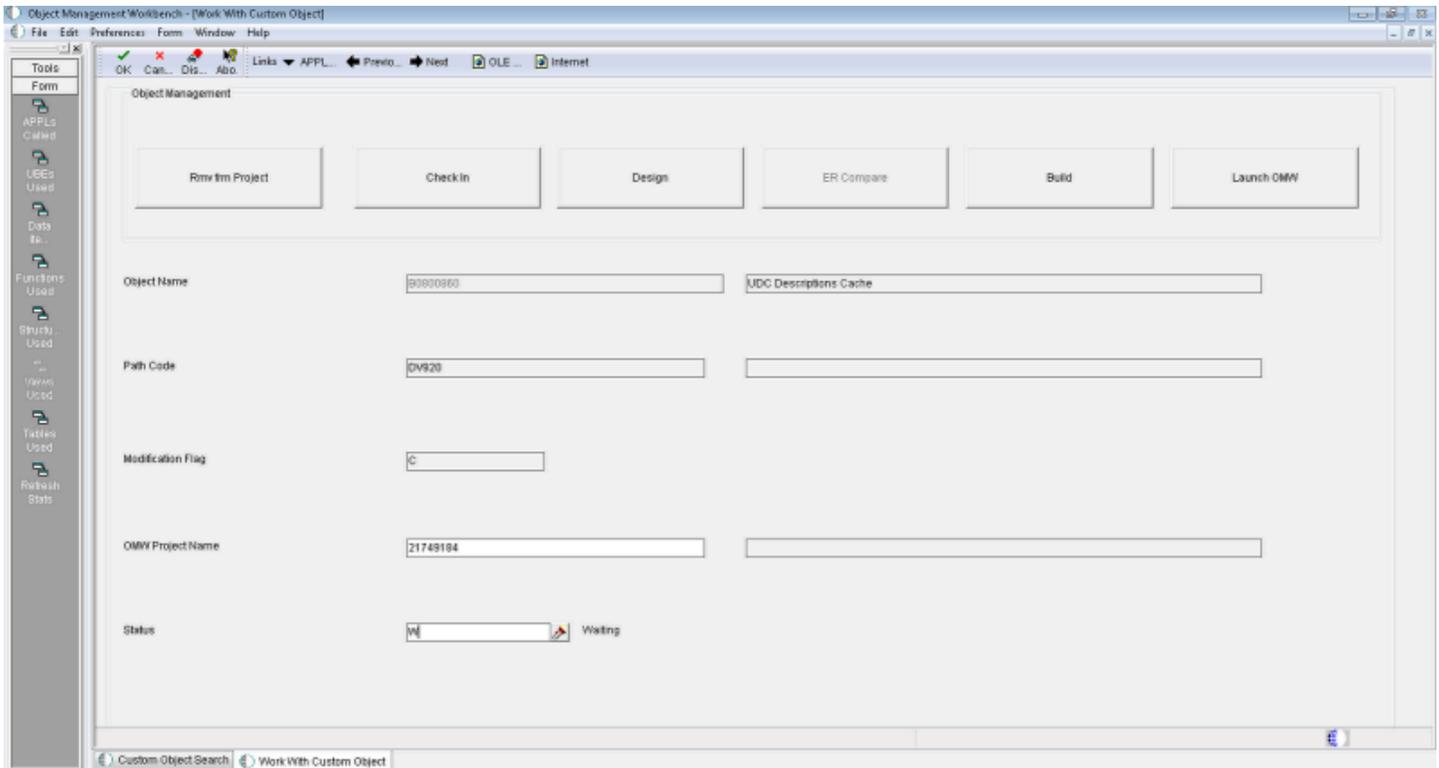
9. Perform the tasks necessary to add the appropriate customized objects.

Button	Function
Rmv frm Project	Removes the object from the current project.
Add To Project	Will launch the OMW Project Search and Select form to all for the end user to choose the project to which to add the object.
Check In	Will check the object in on the current project.

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Button	Function
Check Out	Will check the object out to the current project.
Design	Will launch the appropriate design application for the object type (i.e. FDA for APPL type objects, RDA for UBE type objects, etc.).
ER Compare	Will launch the ER Compare tool for APPL, UBE and BSFN (NER) type objects. The default comparison will be between the local specs and the specs of the login pathcode (both can be modified in the tool once it is launched).
Build	Available for BSFN type objects.
Launch OMW	Will launch OMW (P98220) where more actions can be taken on the object and project as needed.
OK	When complete and a value of "D' is entered and the OK button clicked, the object will be checked (confirmation pending).
Next/Previous	Will scroll through the records on the previous screen for quick completion.

Field	Value
Object Name	The object name.
Path Code	The path code.
Modification Flag	The modification flag with a value of "C" indicates that the object has been customized.
OMW Project Name	Name of the OMW project.
Status	

If the object is finished, it can be marked as D - Done. When the object is checked in the number of completed objects will change.

Available Form Exit:

Cross Reference - for reference purposes, will launch the appropriate cross reference form based on the object selected.

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Retrofitting Custom Modifications

This section provides an overview of retrofitting custom modifications, discusses prerequisites, and discusses how to retrofit custom modifications for:

- Interactive applications
- Reports
- Table conversions
- Tables
- Named event rules
- C business functions

Understanding Retrofitting Custom Modifications

Most users modify their software to make the functionality more applicable to their business situations. When you update to a new release, you need to transfer your modifications to the new release.

Because re-creating custom modifications each time you update the software would be a laborious process, this chapter explains how to integrate the custom modifications that you made in your current software into the updated software. This integration, called retrofitting, enables you to refit the customizations that can be merged into each new version of the software.

Prerequisites

To retrofit modifications, you need a workstation with the upgraded software and the development tools. These tools enable you to compare the customizations that your current software merged into the new software with any path code in the system. This enables you to easily compare the upgraded modifications with a version of your modifications before the upgrade or with the pristine environment of the new release.

This table lists the requirements to retrofit custom modifications.

Requirement	Details
Personnel	A programmer, preferably the same one who did the custom modifications, should perform this task.
Logon status	You must be able to log on to the workstation on which you will retrofit object modifications, typically in the development or prototype environment.
Package	The environment must be updated and a package must be built and deployed to the workstation being used.
Modified Objects	The modified objects must be checked out. See *JD Edwards EnterpriseOne Tools Object Management Workbench Guide* .

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Requirement	Details

Retrofitting Custom Modifications for an Interactive Application

To retrofit custom modifications for an interactive application:

1. From Object Management Workbench (OMW), use Form Design Aid (FDA) to copy custom objects into the target application.

   You can use Compare Mode, under the File menu, to help with this process. Everything custom must be copied in FDA, except for Event Rule (ER) variables and ER statements that do not reference any custom objects.
2. Save your changes.
3. Within FDA, select Edit and Event Rules.

   This option enables you to use EditER to reenter all ER statements that reference any custom objects other than custom ER variables.
4. Save your work.
5. Use the JD Edwards ER Compare tool (ER Compare button in OMW or ER Compare command in FDA) to compare the updated local specifications (target) with the original, customized (source) specifications.
6. Copy ER variables and then ER statements from source to target.

   Do not copy any statements that reference objects that existed only in the source (customized) environment. Those should have been created in step 3.
7. Validate the resulting ER. Save and exit JD Edwards ER Compare.
8. When you finish retrofitting and testing the modifications, check them back in and rebuild the package.
9. Test and fix the modifications, and then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

Retrofitting Custom Modifications for a Report

To retrofit custom modifications for a report:

1. From OMW, use Report Design Aid (RDA) to re-create all custom report objects in the target UBE (universal batch engine).
2. Within RDA, select Edit and Event Rules.

   This option enables you to use EditER to reenter all ER statements that reference custom objects other than custom ER variables.
3. Save your work.
4. Use the JD Edwards ER Compare tool (ER Compare button in OMW) to compare the updated local specifications (target) with the original, customized (source) specifications.
5. Copy ER variables and then ER statements from source to target.

   Do not copy any statements that reference objects that existed only in the source (customized) environment. Those should have been created in step 2.
6. Validate the resulting ER. Save and exit JD Edwards ER Compare.
7. When you finish retrofitting and testing the modifications, check them back in and rebuild the package.

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8. Test and fix the modifications, and then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

Retrofitting Custom Modifications for a Table Conversion

To retrofit custom modifications for a table conversion (TC):

1. Within OMW, use Table Conversion Design Aid to re-create all custom parts of the target UBE.
2. Within Table Conversion Design Aid, click the Advanced ER button within the Mapping dialog.

   This option enables you to use EditER to reenter all ER statements that reference custom objects other than custom ER variables.
3. Use the JD Edwards ER Compare tool (ER Compare button in OMW) to compare the updated local specifications (target) with the original, customized (source) specifications.
4. Copy ER variables and then ER statements from source to target.

   Do not copy any statements that reference objects that existed only in the source (customized) environment. Those should have been created in step 2.
5. Validate the resulting ER. Save and exit JD Edwards ER Compare.
6. When you finish retrofitting and testing the modifications, check them back in and rebuild the package.
7. Test and fix the modifications, and then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

Retrofitting Custom Modifications for a Table

To retrofit custom modifications for a table:

1. Within OMW, on the Design Tools tab, click the Table Trigger Design Aid button and use EditER to reenter all ER statements that reference custom objects other than custom ER variables.
2. Use the JD Edwards ER Compare tool (ER Compare button in OMW) to compare the updated local specifications (target) with the original, customized (source) specifications.
3. Copy the ER variables and then the ER statements from the source to the target.

   Do not copy any statements that reference objects that existed only in the source (customized) environment. Those should have been created in step 1.
4. Validate the resulting ER. Save and exit JD Edwards ER Compare.
5. Use the Table Design Aid tool within OMW to update each table that needs further work.
6. When you finish retrofitting and testing the modifications, check them back in and rebuild the package.
7. Test and fix the modifications, and then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

Retrofitting Custom Modifications for a Named Event Rule

To retrofit custom modifications for a named event rule (NER):

1. Within OMW, use the JD Edwards ER Compare tool to compare the updated local specifications (target) with the original, customized (source) specifications.
2. Copy the ER variables and then the ER statements from the source to the target.

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Do not copy any statements that reference objects that exist only in the source (customized) environment.

3. Save and exit JD Edwards ER Compare.

4. Use the Business Function Design Aid tool from OMW to select and update each business function that needs further work.

5. Within the Business Function Design Aid tool, select Form and Edit.

   The edit option enables you to use EditER to reenter ER statements that reference custom objects. Save your work.

6. Validate the resulting ER.

7. When you finish retrofitting and testing the modifications, check them back in and rebuild the package.

8. Test and fix the modifications, and then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

Retrofitting Custom Modifications for a C Business Function

To retrofit custom modifications for a C business function:

1. Within OMW, use the JD Edwards ER Compare tool to compare the updated local business function source code (target) with the original, customized (source) code.

2. Select Edit, Auto Merge Application to merge the code. Save and exit JD Edwards ER Compare.

3. Start the Business Function Design Aid tool from OMW.

4. Select Form and Edit to use Microsoft Visual Studio to finish editing the code.

5. Select the Build Business Function button in OMW to build the business function.

6. When you finish retrofitting and testing the modifications, check them back in and rebuild the package.

7. Test and fix the modifications, and then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

Using JD Edwards EnterpriseOne Package Management

The package management process provides a means to create a package, to define and build a package, and to deploy packages to both servers and workstations using a step-by-step director process.

> **Note:** The software update process creates the package definition; you simply build and test the package.

Several instances occur in which you will need to update or set up a workstation or server with the JD Edwards EnterpriseOne software. You might need to set up a new workstation, deploy custom solutions to all or to selected users, create a new path code for development, or deploy a fix.

To include any modifications (changed or added business functions or applications) into a package for deployment to workstations (for example, DV900FB or DV900PB), you must define and build one of your own.

> **Note:**
> - *"Building Packages" in the JD Edwards EnterpriseOne Tools Package Management Guide .*

12 Updating Environments

Understanding How to Update the Production Environment

Before proceeding with these instructions, you should test the new modifications with a copy of production data in the prototype environment.

Update the production environment after you update and test development and prototype environments.

Do not include additional environments when updating the live production environment. The purpose of isolating the update of production is to minimize production downtime.

Oracle's JD Edwards EnterpriseOne Global Support Center maintains several documents that describe how to manage and promote Software Updates. These documents address many details of the update process and complement the current documentation.

To access these documents, log on to My Oracle Support, and click the Knowledge tab. Perform a search for the following documents:

- Best Practice for Managing Software Updates
- Applying and Promoting Software Updates
- Understanding and Managing Planner ESUs

Updating the Production Environment

This section discusses how to:

- Update the production environment.
- Prepare to use the updated production environment.

Updating the Production Environment Using OMW

You update the production environment (and other environments) using Oracle's JD Edwards EnterpriseOne Object Management Workbench (OMW).

The software update process creates an OMW project for this update. To update the production environment, promote the project in OMW to the appropriate status as defined by the activity rules. (For example, if you are using Oracle's default JD Edwards EnterpriseOne conventions, you can promote a project from Development to Prototype by changing the status from **21** to **26**. For more information about your organization's activity rules, see your JD Edwards EnterpriseOne administrator.)

> **Note:** If the software update process runs the table and index creation batch application (R98407 in F9843) and you are using OMW to promote the project to the production environment, you must manually create and regenerate the table and index in OMW.

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See *"Understanding JD Edwards EnterpriseOne OMW Administration" in the   JD Edwards EnterpriseOne Tools System Administration Guide   .*

Preparing to Use the Updated Production Environment

After you update the production environment, you create a new package, deploy the new package to a workstation, and test the modifications there.

This table lists the requirements to use the updated production environment:

Action	Details
Personnel	Installer or system administrator
Logon status	On the enterprise server, logged on as user JDE with the database password for user JDE.
Prerequisites	Run the installation plan for the production environment.
Concurrent Tasks	None

To prepare to use the updated production environment:

1. Create a new package.

   See *"Building Packages" in the   JD Edwards EnterpriseOne Tools Package Management Guide   .*
2. Deploy the new production package to the workstation.
3. Surface test the updated production environment.

   After you finish testing the environment, you can deploy the package to other workstations.

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13 Appendix A - Setting Up Localizations

Understanding How to Set Up Localizations

To install localizations using Electronic Software Updates (ESUs), the customer should run the Work with Enhancements application and register the localization with the JD Edwards EnterpriseOne Installation system.

When you run the Work with Enhancements application, it registers the localization with the JD Edwards EnterpriseOne Installation system and enables the software to correctly handle all future updates to the localization. When you register an enhancement from an ESU, the software update system will correctly apply the ESU to your system.

R96450 is a UBE that enables and disables localization code. When ESUs are shipped out, all localization objects are disabled in the ESU. The R96450 enables the correct objects based on the enhancement and revision level that you entered in the Work With Enhancements application.

Adding the Localization

Complete this task to add the localization to the JD Edwards EnterpriseOne environment.

On the deployment server, sign on to the DEP900 environment.

In the fast path, type **P96450**.

> **Note:** In order to run the application, you must install the most recent Planner ESU.

1. On Work with Enhancements, click Add.
2. On the Edit Enhancement Info screen, complete these fields:
   - **Enhancement Type**

     Type or select **ARGENTINA**.
   - **Revision**

     Type the revision number of the Quarterly Update that you obtained in the previous task.
   - **Description**

     Type a valid description.
3. Click OK.
4. Click OK.
5. On the Work with Enhancements form, click Enable to run the R96450 enabler.

   > **Note:** Click Disable to disable the enhancement type.

6. When the UBE completes, open the generated UBE report, and ensure that the report has not recorded any errors. If the report contains errors, forward the report to your GSC representative.

   This information is also contained in the jde.log.

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7. If the UBE runs successfully without errors, the Localization should be successfully registered. The software will now correctly manage the localization for all subsequent software updates.

   Once you have registered the localization, you may take ESUs as normal.

Changing the Revision Level

Complete this task to update the revision number of the localization.

1. On the Work With Enhancements browse form, select the row for ARGENTINA.
2. Click Select.
3. Type the new revision number in the Revision box and press OK.

   The program displays a warning message.
4. Click OK to synchronize the NER to the new enhancement revision level.

   The Enabler automatically runs with the specification merge, R98700. For it to run, you must have an enhancement type set up and the software update must have NERs.

Setting Processing Options for R96450

These values are the default processing options and data selection for the XJDE001 version. You can tell that you are running the XJDE001 version because the P96450 prompts you with the warning that it will run R96450 version XJDE0001.

The default processing options are:

Environment Name
DV900

Enter the name of the environment for which you want to update the NERs.

Enhancement Operation
E

E indicates that the NER for localization will be enabled.

Generate NER
<blank>

A blank value indicates that the NER source will not be regenerated (for example, you will need to build a full package and deploy to get the changes to a client workstation).

Level of Detail
0

A value of 0 indicates that only errors and lines changed will be printed on the report.

Proof or Final
1

A value of 1 indicates that the UBE will update the NER.

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A data selection of 70 means that only NER objects belonging to system code 70 (localization) will be affected.

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central objects merge

A process that blends a customer's modifications to the objects in a current release with objects in a new release.

checksum

A fixed-size datum computed from an arbitrary block of digital data for the purpose of detecting accidental errors that may have been introduced during its transmission or storage. JD Edwards EnterpriseOne uses the checksum to verify the integrity of packages that have been downloaded by recomputing the checksum of the downloaded package and comparing it with the checksum of the original package. The procedure that yields the checksum from the data is called a checksum function or checksum algorithm. JD Edwards EnterpriseOne uses the MD5 and STA-1 checksum algorithms.

Control Table Workbench

An application that, during the Installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.

control tables merge

A process that blends a customer's modifications to the control tables with the data that accompanies a new release.

edit rule

A method used for formatting and validating user entries against a predefined rule or set of rules.

Object Librarian Merge

A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.

Specification merge

A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.

Specification Table Merge Workbench

An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.

Table Conversion Workbench

An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.

User Overrides merge

Adds new user override records into a customer's user override table.

Versions List merge

The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.

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