PeopleSoft.

EnterpriseOne JDE5
Product Packaging
PeopleBook

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Product Packaging PeopleBook
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Welcome

This guide explains how to use the Product Packaging Tools to create a software master image of ERP 8.0 objects. This section provides definitions of product packaging, a process overview, and prerequisites that are required to use the tools. The rest of the guide describes how to use the tools to create your own software master that can be installed onto any enterprise that contains a ERP 8.0 installation at the same release level.

For the complete list of tasks on how to create a software master from start to finish, see the "Software Master Creation" section of this guide. The rest of the sections go into further detail about the different aspects of software masters and the Product Packaging Tools, such as the software master definition, change table configurations, and the final software master.

Product Packaging Definitions

Product Packaging is the ability to master and package a group of ERP 8.0 objects. It provides customers a mechanism to move objects from Central Objects and Control Tables from one location to another J.D. Edwards business partners can use the Product Packaging Tools to develop and market software modules that are based in ERP 8.0. In addition, customers who modify ERP 8.0 can use the Product Packaging Tools to deliver changes to other locations within their company that are not directly connected to the central enterprise.

The Product Packaging Tools manage the task of mastering ERP 8.0 software. In this capacity, the tools oversee the entire mastering process from defining a software master to mastering the CD. The tools start with the definition process, where the user provides as much information as possible up front. After the user enters the critical information, the tools provide a batch process to validate the software mastering information before mastering. Next, the tools provide a batch process to master the software. Finally, the tools provide a batch process to validate the final software master image.

The following graphic details the product packaging flow:

Add/Select — Work With Software Mastering — Copy

OK/Cancel

Software Mastering Director

Validate

Validate Master Batch Process

Master

Read/Write

Read

Software Mastering Master File

Master Software Batch Process

Read/Write

Read/Write

Read/Write

Create Directory Structure Batch Process

CD-specific Batch Processes

Copy Software Mastering Configuration Batch Process

Software Mastering Detail File

To better understand the overall process, you should be familiar with the following key terms and processes:

Software Mastering Director	This director provides ERP 8.0 administrators with the ability to build a mastered version of ERP 8.0 objects or modules. The director handles this through a series of batch processes and manual tasks that build all of the components of a ERP 8.0 master. The final product is an image of their product, using a tree format, that they can burn onto a CD.
Change Table Configuration Director	This director provides ERP 8.0 administrators with the ability to define how to build the software master's change tables. See the Glossary for a definition of Change Tables.
Distributed Development	Distributed development refers to the ability to perform development using one installation of ERP 8.0 and deploying that development to another installation of ERP 8.0. For example, a developer in the Paris office could create new objects using the Paris installation of ERP 8.0. A ERP 8.0 administrator in Paris could then use the Product Packaging

Tools to create a CD that includes these new objects. The CD could then be shipped to the London office, where an administrator updates the London installation of ERP 8.0, assuming both installations are at the same ERP 8.0 release level. The Product Packaging Tools described in this guide provide this functionality.

This ability should not be confused with "remote development." Remote development is the creation of ERP 8.0 objects by a developer who is completely disconnected from any ERP 8.0 installation. The developer could then connect to a ERP 8.0 installation at a later time and merge those objects. Remote development will be available in a later release of ERP 8.0.

Prerequisites

This guide is designed for Management Information Systems (MIS) managers and administrators of ERP 8.0. Success depends upon your understanding of the concepts and procedures. The recommended method for obtaining this information is to attend the relevant training courses. Information about course offerings, dates, and locations is available at the J.D. Edwards Web site. At a minimum, read the following guides before you begin:

- *ERP 8.0 Foundation Guide*
- Configuration Planning and Setup Suite:
- *Configurable Network Computing Implementation Guide*
- *System Administration Guide*
- *Package Management Guide*
- *Server and Workstation Administration Guide*

J.D. Edwards Worldwide Customer Support

Important: J.D. Edwards compiles important information that affects this guide and the update process at the following Internet addresses:

For J.D. Edwards employees:

https://knowledge.jdedwards.com/jdecontent/customerknowledge/
knowledge/breakingnews.htm

For business partners:

https://businesspartner2.jdedwards.com/OneSource/SharedSrc/
knowledge/breakingnews.htm

To navigate to this site within the Knowledge Garden, use the browse tab. Drill down through the menu structure: Product Support, SARs/Knowledge/Calls, to Breaking News. On Breaking News, click the ERP 8.0 menu and choose the appropriate release of ERP 8.0 from the list given.

For business partners and J.D. Edwards employees only, the minimum technical requirements for running ERP 8.0 can be accessed at:

> https://knowledge.jdedwards.com/jdecontent/technicalmarketing/
> tminformation/bjtechreqs.htm

> To navigate to this site within the Knowledge Garden, use the browse tab. Drill down through the menu structure: Sales and Marketing, ERP 8.0 Online. On ERP 8.0 Online, there is a link to Minimum Technical Requirements.

Review this information before you begin to update a ERP 8.0 release.

If you cannot resolve problems when you install ERP 8.0, contact J.D. Edwards Worldwide Customer Support for assistance. Limit your questions to those regarding J.D. Edwards software. For questions about operating systems, databases, and other software products, contact the appropriate vendor.

The J.D. Edwards Web site is available for support issues submitted to: http://www.jdedwards.com.

During normal business hours, you will receive a confirmation within an hour of submitting issues via the Web, e-mail, or fax. An issue number is assigned immediately when you report an issue by telephone, and this number references all activity related to your issue.

Premier maintenance customers can submit support issues via e-mail address: premier_customer_support@jdedwards.com. Outside normal business hours (Monday-Friday, 8:00 A.M.-5:00 P.M. MST), premier customers should use the telephone for the most prompt after-hours service.

Standard maintenance customers should send support issues via fax or e-mail to the appropriate service provider location listed below:

Location	Telephone Number	Fax Number; E-mail Address
North America	1-800-289-2999	303-334-4141; denver_customer_support@jdedwards.com
Latin America (except below)	00-1-303-334-4000	303-334-4141; denver_customer_support@jdedwards.com
Mexico	95-800-784-4260	303-334-4141; denver_customer_support@jdedwards.com
Chile	1-230-020-5124	303-334-4141; denver_customer_support@jdedwards.com
Colombia	980-153-560	303-334-4141; denver_customer_support@jdedwards.com
Venezuela	800-1-2743	303-334-4141; denver_customer_support@jdedwards.com
Argentina	001-800-333-1111, then 303-488-4639-9194, then 1-800-784-4260	303-334-4141; denver_customer_support@jdedwards.com

Ecuador	999-170, then 303-488-4639-9194, then 1-800-784-4260	303-334-4141; denver_customer_support@jdedwards.com
Peru	170 (199 for cellular phone), then 303-488-4639-9194, then 1-800-784-4260	303-334-4141; denver_customer_support@jdedwards.com
Brazil	00081-4-550-2779	303-334-4141; denver_customer_support@jdedwards.com
Europe EMEA (except below)	44-1494-682-682	44-1494-682-698; london_customer_support@jdedwards.com
France	33-1-44-74-20-15	44-1494-682-698; london_customer_support@jdedwards.com
Germany	49-6103-762-110	44-1494-682-698; london_customer_support@jdedwards.com
Holland	31-35-548-0222	44-1494-682-698; london_customer_support@jdedwards.com
Italy	39-02-2696-7612	44-1494-682-698; london_customer_support@jdedwards.com
Asia Pacific (except below)	65-895-9656	65-227-2698; singapore_customer_support@jdedwards.com
China (Beijing, Shanghai)	10-800-650-0099	65-227-2698; singapore_customer_support@jdedwards.com
China (other provinces)	108-657, or 108-650, then follow voice prompts to dial Singapore at 895-9656	65-227-2698; singapore_customer_support@jdedwards.com
Hong Kong	800-90-3055	
Malaysia	1-800-80-1557	
Japan	81-3-3265-7143	81-3-3265-7145; japan_customer_support@jdedwards.com
Australia	1-800-145-200	

Conventions

The following explain the typographic and design conventions used in this guide.

Version Numbering

The following graphic explains how J.D. Edwards numbers its releases:

Indicates
release

Indicates the
version of the
release

B | **73** | . | **3** | . | **X**

Indicates
OneWorld

Indicates
cumulative
update level
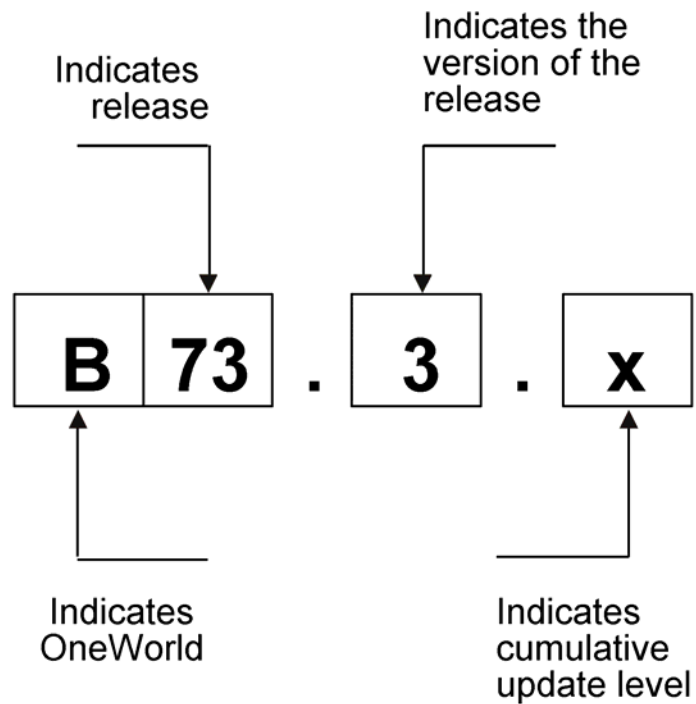
Fonts

The following special fonts are used in this guide:

Italic font designates variables used in the guide. For example, if you see the variable *deploymentserver* in a command you must enter, substitute the phrase *deploymentserver* for the actual name of your deployment server. Also, the names of other J.D. Edwards ERP 8.0 guides are in italic font. For example, the *ERP 8.0 Installation Guide*.

`Courier font` designates commands or other information that you must type into the system. For example:

Type the name of the environment, such as `DEVTEMP`.

Software Master Creation

This section explains how to create a software master from start to finish. This includes defining the master, selecting the product package, validating the software master definition, mastering the software, and validating the finished master. Use the checklist to ensure that you complete all of the processes necessary to create a software master.

Checklist for Creating a Software Master

Use the following checklist to ensure that you complete all of the processes necessary to creating a software master, as explained in this section.

- ❑ Ensure that at least 1GB of space is available for the TEMP directory of the workstation from which you use the Product Packaging Tools. This memory requirement is the most memory you might need for a software master. The actual size of the master depends upon the size of the package you create.
- ❑ Complete the tasks included in the "Prerequisites to Creating a Software Master" chapter in this section.
- ❑ Define a software master using the CD Configuration Director:
  - Provide information about the type of master you want to create, such as its name, release number, etc.
  - Select the package you want built into the master.
- ❑ Configure change tables using the Change Table Director:
  - Provide the target release number for the change tables.
  - Provide source environment information about the change tables.
  - Select the change tables and their versions.
- ❑ Validate the software master definition.
- ❑ Create the final software master, which automatically validates the master.
- ❑ Use the software master to update ERP 8.0

Prerequisites to Creating a Software Master

This chapter explains how to perform tasks that enable the Product Packaging Tools. These are one-time processes. After completing them for the first time you will not need to perform them again.

Setting up the System TEMP directory

In this task you create a temporary directory that will be used to store an Access database for mastering the Product Packaging CD.

► To set up the System TEMP directory

1. From your Windows desktop, select Start-Settings-Control Panel.
2. On Windows Control Panel, double-click the System icon.
3. Click the Advanced tab.
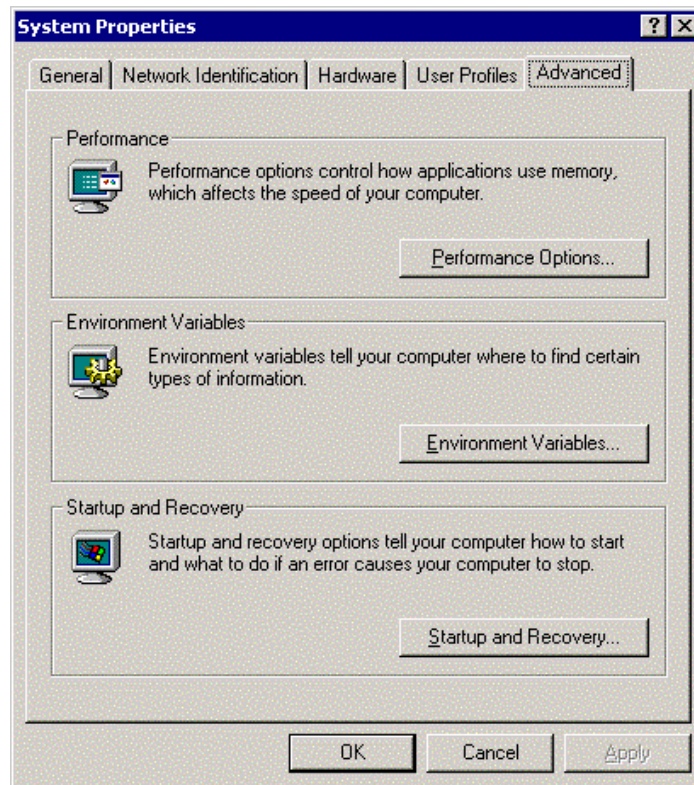
4. Double-click Environment Variables.

Environment Variables

User variables for cb4883980

Variable	Value
lib	C:\Program Files\Microsoft Visual Studio...
MSDevDir	C:\Program Files\Microsoft Visual Studio...
path	C:\Program Files\Microsoft Visual Studio...
TEMP	C:\TEMP
TMP	C:\TEMP

New...   Edit...   Delete

System variables

Variable	Value
TEMP	C:\TEMP
TERM	nutc
TERMCAP	C:\PROGRA~1\MKSTOO~1\etc\termcap
TERMINFO	C:\PROGRA~1\MKSTOO~1\usr\lib\termi...
TMP	C:\TEMP

New...   Edit...   Delete

OK   Cancel
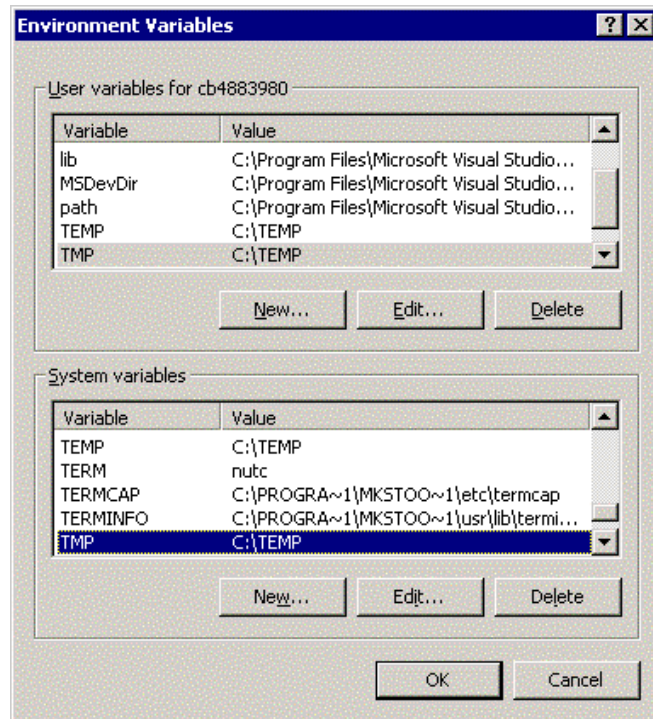
5. Set the TMP and TEMP variables for both the User and System settings so they all access the same directory (for example, c:\TEMP).

Note:

Ensure that the windows temp directory on the workstation has at least 1 GB free disk space available (the more space the better). If the temp directory has less than 1GB of free space, you can create a temp directory on another disk drive with adequate space and set the system environment variables TMP and TEMP to point to the new temp folder. Reboot your system for the change to take effect.

This directory will store the Software Master you create in the following tasks.

Creating Pristine Control Tables

In order for Control Table changes to be included on an update CD, the Product Packaging tool requires an out of the box (pristine) copy of the Control Tables. If your ERP 8.0 installation includes the JD7334 Pristine Environment, these tables already exist in your ERP 8.0 instance, and you can skip this task. If, however, your installation does not include the pristine environment, you can create a set of pristine Control Tables by copying the \planner\data\jdeb7.mdb Control Table tables to a new data source, "Control Tables – JDE". This is a one-time process and can be accomplished by completing the following task.

▶ **To Create Pristine Control Tables**

1. On the Deployment Server, Sign onto ERP 8.0 in the DEP7334 environment.

2. From menu GH9011, select Batch Version.

3. Type R98403 in the Batch Application field and click Find.

4. Select version XJDE0501 (Control Tables For Pristine Database), and choose Processing Options from the Row menu.

5. Click on the Environment tab and change the following processing options:

   - Target Environment (option 1), blank

   - Target data source (option 2), enter "Control Tables – JDE"

   - Data Load (option 3), enter 2 – this will copy data to the table.

   - Source data source (option 4), enter "OneWorld Local"

6. Run the version locally.

   The report copies the F0004, F0004D, F0005, F0005D, F0082, F00821, F0083, F0084, F91100, F91100D, F91400, F91410, F91420, F91430, F91500 and F91510 tables from the planner\data\jdeb7.mdb database to "Control Tables – JDE".

7. Verify the results of the report and the creation of the tables.

8. Exit the Batch Versions application.

9. From menu GH9011, select Object Configuration Manager (OCM).

10. Select the machine with the "System – B7334" data source.

11. For the JD7334 environment, add OCM mappings for tables F0004, F0004D, F0005, F0005D, F0082, F00821, F0083, F0084, F91100, F91100D, F91400, F91410, F91420, F91430, F91500 and F91510, and assign these new tables to the Control Tables – JDE data source.

12. Activate the new mappings.

13. Exit out of OCM.

Creating the Product Packaging Data Source

The Product Packaging process creates an Access database in the TEMP directory on the workstation that the Product Package CD image is mastered on. This database is used to store data that will be mastered on the CD. In order to copy tables into this database, an ODBC data source must be created on the mastering workstation. Follow the task below to create the "ERP 8.0 - Product Packaging" ODBC data source and database:

For general information about creating data sources, see the "Creating Third-party Data Sources for SQL Server" chapter in the appendix of the *ERP 8.0 Installation Guide*. This is a one-time process. After creating the Product Packaging data source, you will not need to do it again.

▶ To create the Product Packaging data source

From the workstation where you will run the Product Packaging Tools

1. Create a directory named "Master" in the temp directory you set up previously (for example, c:\TEMP\Master).

2. Access the workstation's Control Panel and double-click 32-bit ODBC.

   The ODBC Data Source Administrator window appears.

3. Click Add.

   The Create New Data Source window appears.
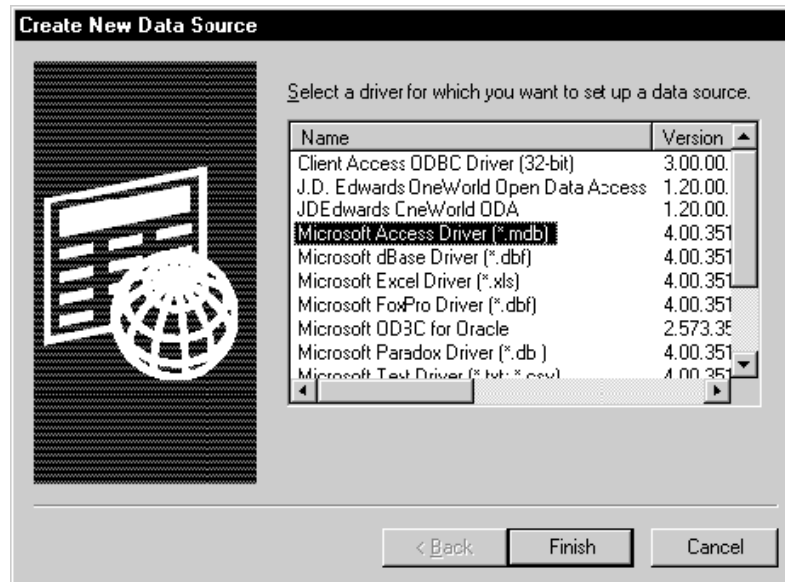
4. Choose Microsoft Access Driver (*.mdb), and click Finish.

   The ODBC Microsoft Access Setup window appears.
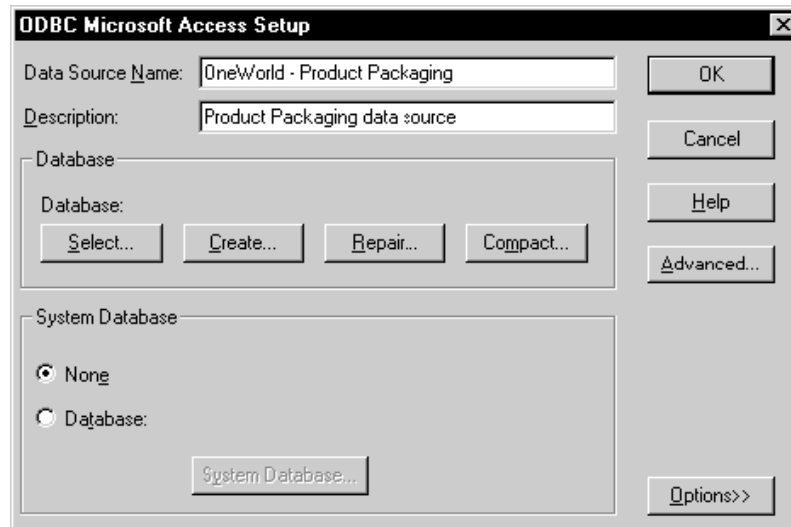
5. Enter the following data source into the Data Source Name field:

   ```
   ERP 8.0 - Product Packaging
   ```

6. Enter a description into the Description field.

7. In the Database group box, click Create.

   The Select Database window appears.
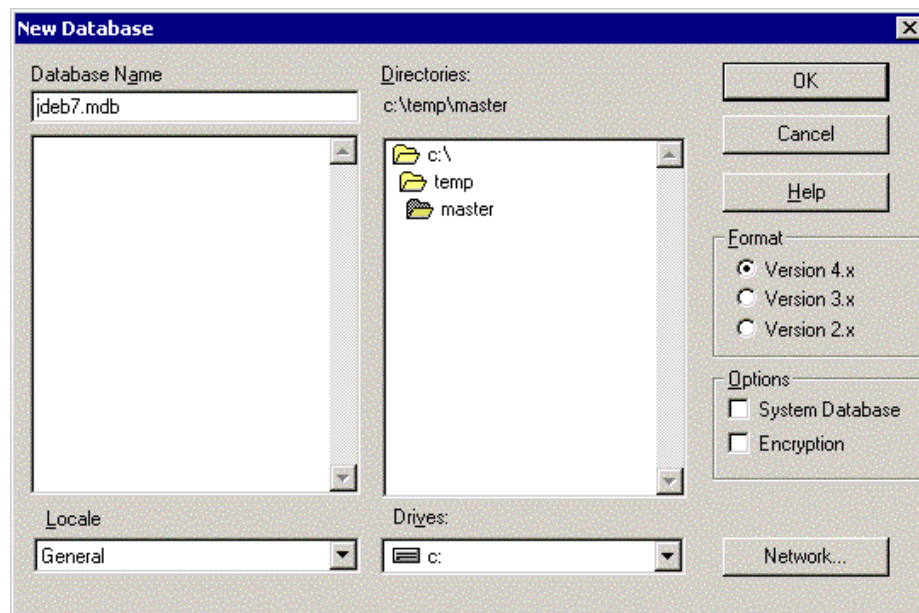
8. Type in jdeb7, and select the \temp\master directory you created earlier in this task.

9. Click OK.

A Microsoft Access Setup dialog box appears acknowledging that you successfully created the following path and database:

`\temp\master\jdeb7.mdb`

The ODBC Microsoft Access Setup window reappears.

10. Click OK.

The ODBC Data Source Administrator window reappears.

11. Verify that ERP 8.0 created the following pristine data dictionary, and that the data source is similar to the Data Dictionary - B7334 ODBC data source. There should be two differences between the data sources:

- The data source name should be: `Data Dictionary - JDE`

- The owner should be: `PRISTCTL`

You need the pristine data dictionary data source if your data dictionary is stored in either SQL Server or DB2/400. An Oracle database does not require an ODBC data source.

12. When finished adding the data source, click OK from the ODBC Data Source Administrator window.

13. On the Deployment Server, sign on to ERP 8.0 in the DEP7334 environment.

14. Enter GH9011 in the Fast Path.

15. Double-click on Database Data Sources (P986115).

16. On Database Data Sources – [Machine Search & Select], select the machine with the System – B7334 data source.

17. On Database Data Sources – [Work with Data Sources], click Find.

18. Select the OneWorld – Product Packaging data source.

19. On Database Data Sources – [Data Source Revisions], verify the OneWorld – Product Packaging data source is defined with the following values:

- Data Source Name: OneWorld – Product Packaging
- Data Source Type: A – Access
- DLL Name: JDBODBC.DLL
- Database Name: OneWorld – Product Packaging
- Server Name: LOCAL
- Platform: LOCAL

20. Save any changes, and exit the Data Source application.

Creating a Data Dictionary in the Pristine Data Source

You need to create a data dictionary in your ERP 8.0 Pristine data source. This is a one-time process. After creating these tables, you will not need to create them again.

▶ **To create a data dictionary in the Pristine data source**

From the deployment server

1. Sign onto the JDEPLAN environment. Use `JDE` as your user name and `JDE` as your password.

2. From the System Administration Tools (GH9011) menu, choose Batch Versions.

3. On the Work With Batch Versions - Available Versions form, type `R98403` into the Batch Application field and click Find.

4. Choose version `XJDE0509` and click Copy.

5. On Version Copy, enter a new version name and a new version title, then click OK.

6. On Work With Batch Versions - Available Versions, choose the version you just created, and from the Row menu, choose Processing Options.

7. Complete the following processing options:

   - "2. or Enter the name of the target Data Source for the database to be created for."

     Type `DATA DICTIONARY - JDE`

   - "4. Enter the name of the source Data Source for Loading the Data."

     Type `OneWorld Local`

     This data source exists only the deployment server.

     These processing options set up the batch process to copy the data dictionary tables from planner/jdeb7.mdb to the new pristine data dictionary.

8. Set the version you just created to run in the proof mode first, as explained in the "Submitting a Report" section of the *Enterprise Report Writing Guide*.

9. Run this report locally, not on the enterprise server.

10. Verify the results of this report.

11. When satisfied with the proof-mode results, run the version you just created in final mode.

12. Run OCM from the fastpath and select the enterprise server.

13. For the JD733 environment, add OCM mappings for F00165, F9200, F9202,F9203, F9207, F9210, F9211 that point these tables to Data Dictionary - JD7334.

14. Activate the new OCM mappings.

Creating Change Tables

Product packaging requires that a set of tables called change tables exist and be mapped to the "Control Tables - <environment>" data source. A change table is a table that contains the items that have changed between releases or updates. These tables are normally generated during the installation process when you run the environment workbench. If, however, the environment is populated with "Demo Data," these tables will not be generated even though the environment workbench reports that they were created successfully.

Complete the following tasks if you need to create change tables in the mastering environment. If the change tables already exist, skip to "To verify the creation of change tables."

► To create change tables

This task must be completed once to initially build the change tables.

1. On the Deployment Server, sign onto the DEP7334 environment in ERP 8.0.
2. Double-click on Batch Version from menu GH9011.
3. Type R98403 in the Batch Application field and click Find.
4. Choose version XJDE0507 (Change Table) and click Copy.
5. On Version Copy, complete the following fields:
    - New Version: CREATECT
    - Version Title: Type a name for the new version
6. Click OK.
7. On Batch Version Design, click on Processing Options on the General tab.
8. Edit the following processing options for CREATECT:
    - Target Environment (option 1), blank
    - Target data source (option 2), enter "Control Tables – <environment>" (where <environment> is the name of the environment you are mastering, such as CRP)
    - Data Load (option 3), enter 1 – this will create the table without copying it.
    - Source data source (option 4), enter "OneWorld Local"
    - Click OK.
9. On Batch Version Design, click Run.
10. On Version Prompting, choose Data Selection and click Submit.
11. On Data Selection, add the following tables to the right operand for BC OBNM: F960004, F960005
12. Run the version. The program creates your change tables in "Control Tables – CRP" (or whichever environment Control Table data source that you specified).

► **To create the F969861, F9698710, F9698712 and F967611 change tables**

There are four additional change tables that must be created in data sources other than Control Tables - <environment>. Complete this task for each of the following tables: F969861, F9698710, F9698712 and F967611.

1. From menu GH902, double click Object Management Workbench.

2. In OMW, click the Find Button.   The JDE – Default Project appears in the left window.
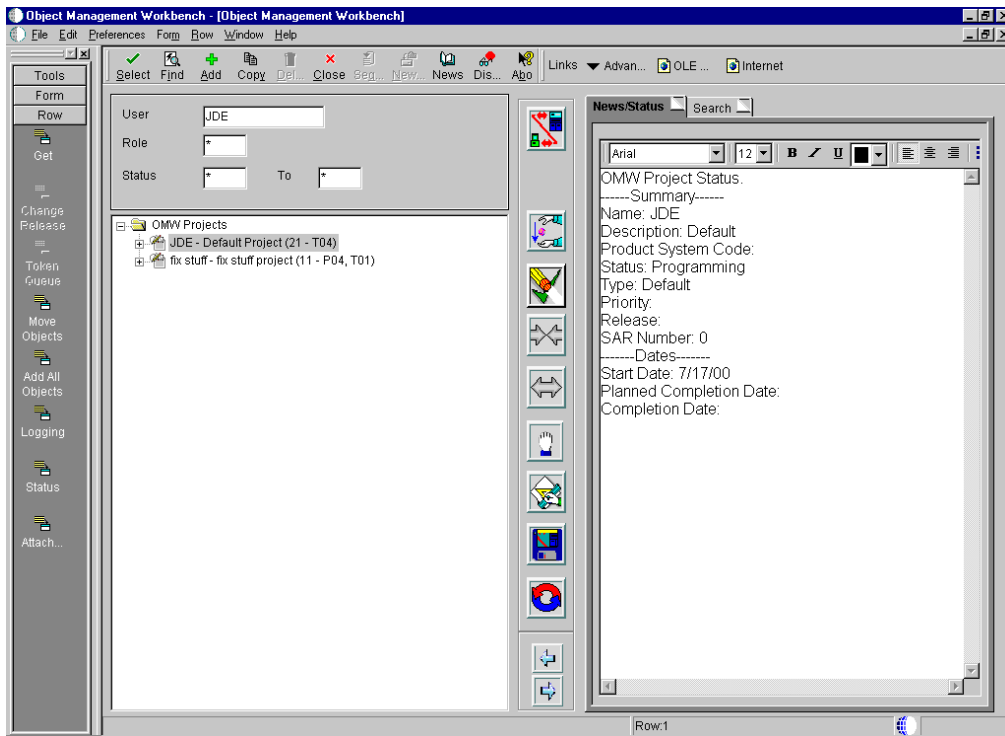
3. In the left pane, expand the Owners icon under the Default Project.

4. Choose Originator – JDE and click the Select.

5. On Project User Details, click in the User Role field, and use the Visual Assist to select Developer or type in 02.
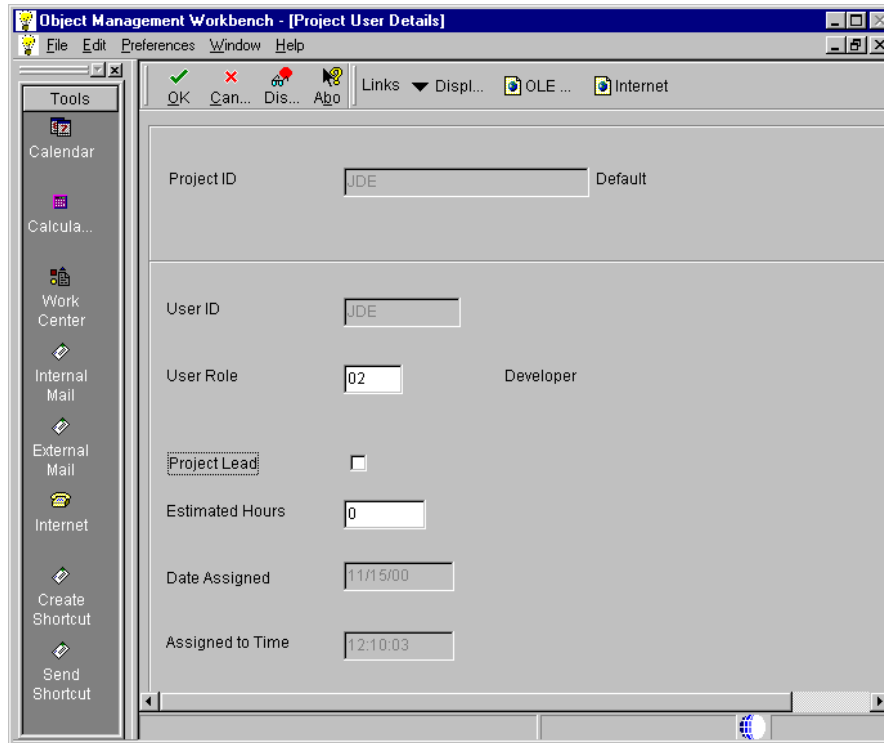
6. Click OK.

7. Click the Search Tab in the right pane, and complete the following fields:

- Category: Object Librarian

- Search Type: Object Name

- Search: Type one of the following tables in the Search field:

  - F969861

  - F9698710

  - F9698712

  - F9676

8. Click the Search button ⚙ directly to the right of the Search field.

The table appears in the right pane.
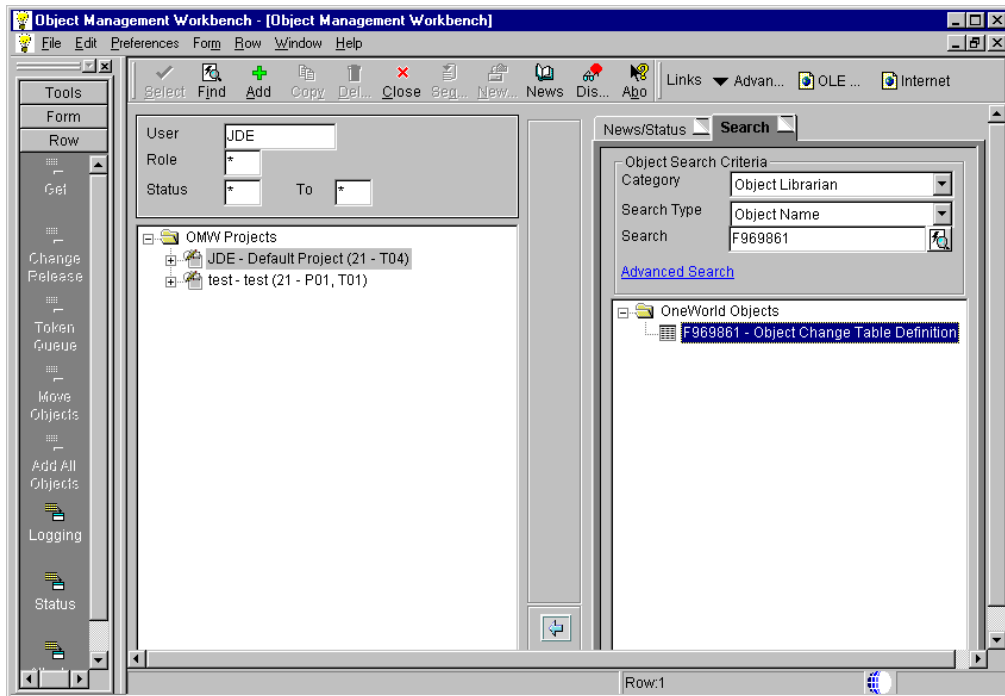
9. Choose the table in the right pane, and click the arrow pointing to the left ⬅ in the center toolbar.

   The object appears in the left pane under the Default Project - Objects tree.
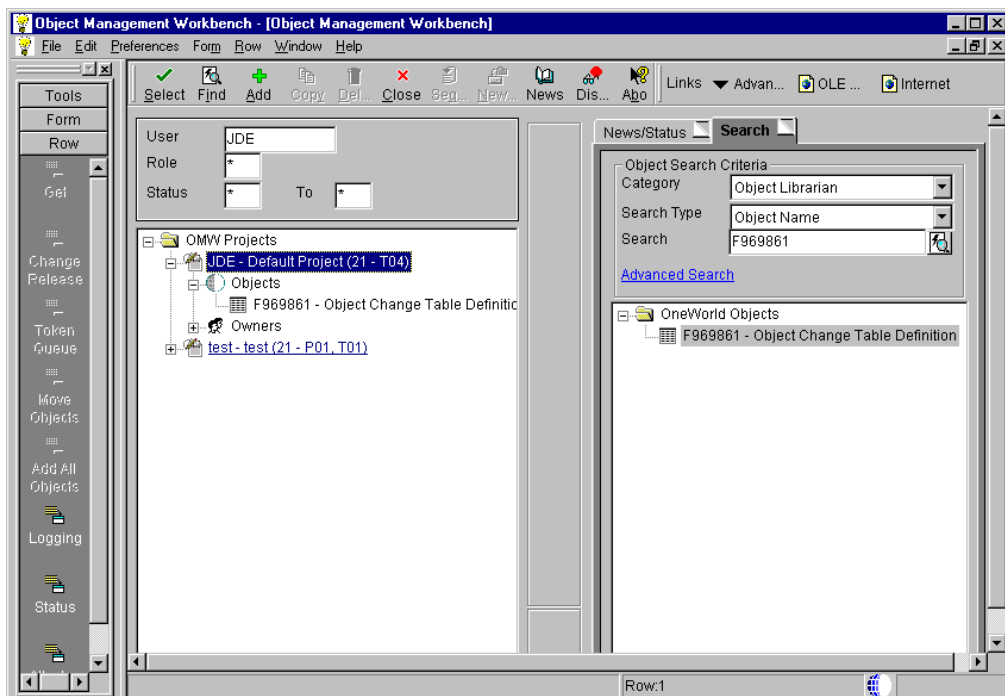
10. On Object Management Workbench, re-expand the Default Project tree in the left pane and choose the desired table under the Objects icon.

11. Click Design 🖼 in the center toolbar.

18
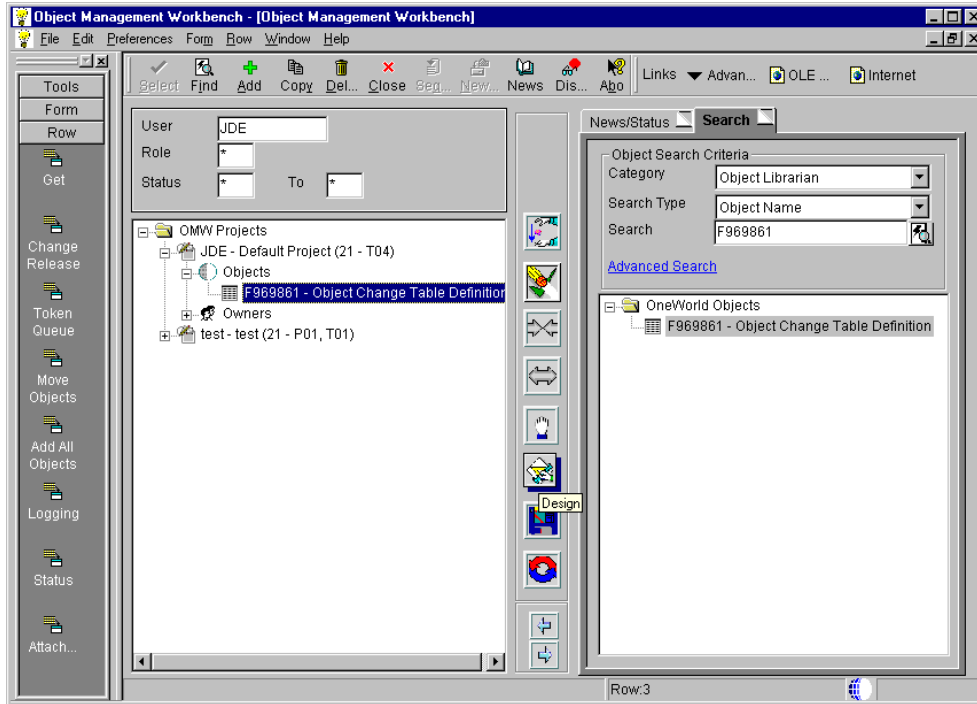
12. On Table Design, click the Table Operations tab, and click the Generate Table icon.
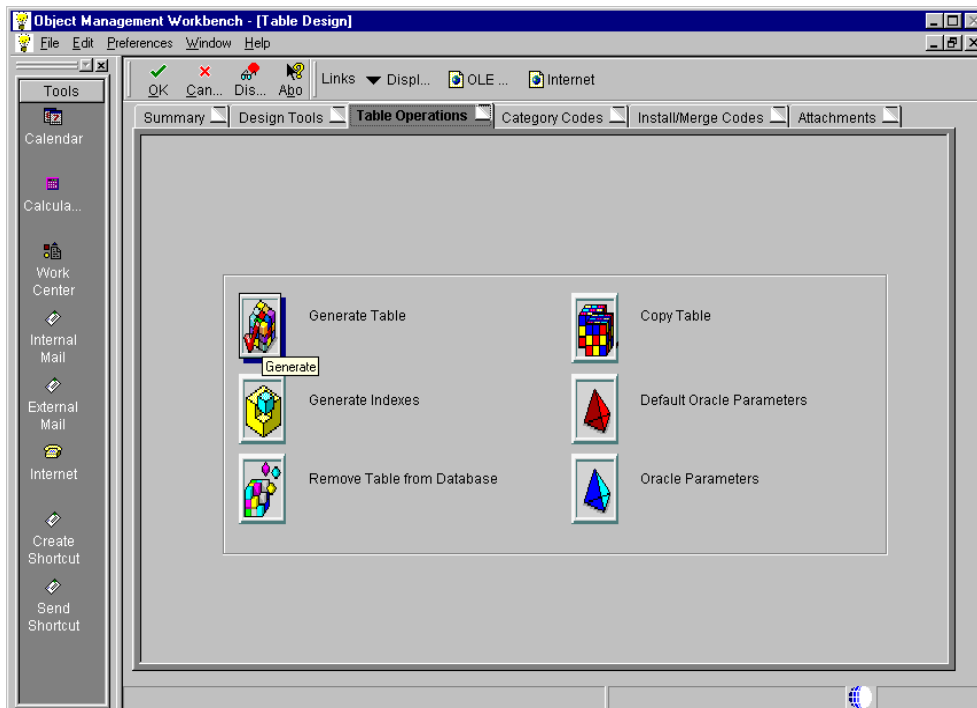
13. In the Data Source field, type the relevant Data Source for the mastering environment from the list below.

For Table:	Enter this Data Source:
F969861, F9698710, F9698712	Central Objects - <environment>
F967611	System - <environment>
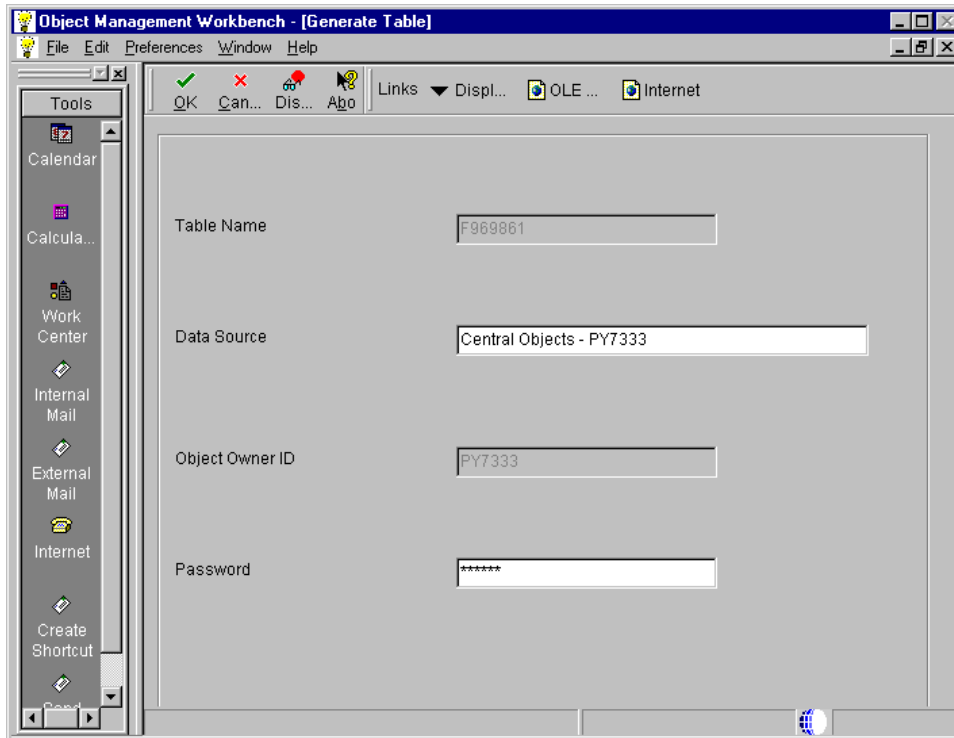
14. , Type the data base password if necessary, and click OK to generate the table in the data source.
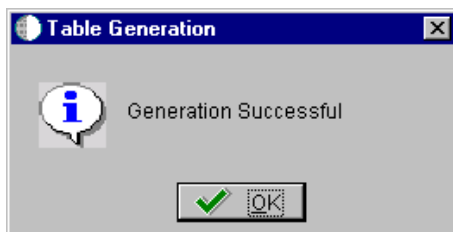
15. On Table Generation, click OK.

16. Click OK to return to Object Management Window.

17. Choose the table in the left pane and click the right-arrow on the center toolbar.

18. Return to step 7 and create the other tables.

19. Exit OMW when all four tables have been generated.

► **To verify the creation of change tables**

For each of the change tables, you should verify that there is an OCM mapping that points to the appropriate data source for the mastering environment.

1. From menu GH9011, double click Object Configuration Manager.

2. On Machine Search and Select, select the machine with the "System – B7334" data source.

3. For the mastering environment, verify that each of the following change tables is mapped to the correct data source, and that each of the mappings is activated:

Change Table	Data Source
F960004, F960005, F9691100, F9694100, F9691410, F9691420, F9691430, F9691500, F9691510, F9746, F9751, F9752, F9753, F9754, F9755, F9757, F9759, F9760, F98800DN, F98800N, F98800TN, F98810DN, F98810N, F98811N, F98830N, F98840N, F98845N	Control Tables – <environment>
F969861, F9698710, F9698712	Central Objects - <environment>
F967611	System – B7334

4. Exit out of OCM.

5. Run Universal Table Browser (UTB) to verify that the tables were created in the correct location.

Creating a Software Master

This chapter explains how to create a software master from start to finish. Use the checklist provided earlier in this section to ensure that you complete all of the tasks.

Defining a Software Master

This task explains how to use the CD Configuration director to define a software master. If you have already defined a software master and you need to revise the definition, see "Revising a Software Master Definition" in this guide.

A software master definition provides the structure for your finished software master. It establishes what template and packages to use, what build steps to follow, and the directory structure of your final master. The software master definition is only the structure or outline of the master. Once you set up your software master definition, you validate it and then create the actual software master.

Including custom data in the software definition

The Product Packaging application allows you to include custom data on the software master. Read the following tips for including custom tables and media objects on the software image.

Including new tables

If a new table is to be delivered with pristine data, the mastering process should automatically handle this if the following conditions are met:

- The table is included in the update package.

- The table is in the update package's environment.

- The table is not included in the target environment.

- The table and index change table exists.

After the mastering process is complete, the table should be in the database $TEMP\master\jdeb7.mdb.   There should also be records in the table and index change table for that new custom table.

Including custom media objects

To include custom media objects in the product package, add the following build steps to the ASU template:

6. Add a build step to copy table records from the F00165 table to the jdeb7.mdb database.

7. Add a build step to copy the media object files from the deployment server to the image path directory.

For more information about adding build steps, see "Revising a Software Master Template."

▶   **To define a software master**

Sign onto a ERP 8.0 workstation using the development environment where your modifications exist, such as DEV733.

1. From Product Packaging (GH962), choose OneWorld Product Packaging (P9640).

    The Work With Software Mastering form appears.

2. Click Add.

    The CD Configuration Director form appears.

3. Click Next.

    The CD Information form appears.

4. Complete the following fields:

- Name

  Enter a unique name for the software master definition you are adding, such as B7334 Update. This name must exactly match the name of the package to be included, and must be in all UPPERCASE letters.

- Release

  Enter the ERP 8.0 release for the software master definition, such as B7334. This is the release currently installed on the client workstation you are using. Make sure that the release field contains the release and cum that you are running. i.e. B7334 or B7334 (not B733).

- Type

  Specifies the type of CD you want to master. In this case, it is an ASU CD (option 9), which is the ERP 8.0 default. If you select an option other than 09, ERP 8.0 displays an error message when you press the Next button. This field indicates which software template to use when you further define the master. Templates include the build steps and directory structure necessary to create a software master. For information about templates, see the "Software Master Templates" section in this guide.

- Build Phase

  Enter which development phase your software master definition represents, such as an alpha, beta, or general availability phase.

- Description

Optional. Enter a description of the software master definition.

- Image Path

    Enter the directory path where you want your software master definition to resideon the Product Packaging build machine (for example, d:\b7\PP). If the directory does not exist, ERP 8.0 will create it for you when you run the software mastering process. The directory you indicate will be the root directory for the software master you create. It will contain the contents of your master. Once you create the image, the CD can be burned through the CD burner's software.

5. Click Next.

    If you chose a template that appears on the list of values when you click the visual assist button from the Type field but the template is not on your enterprise, the CD Template Does Not Exist form appears. You have probably entered the incorrect release number. Click OK to continue adding your software master definition, or click Cancel to stop adding the definition.
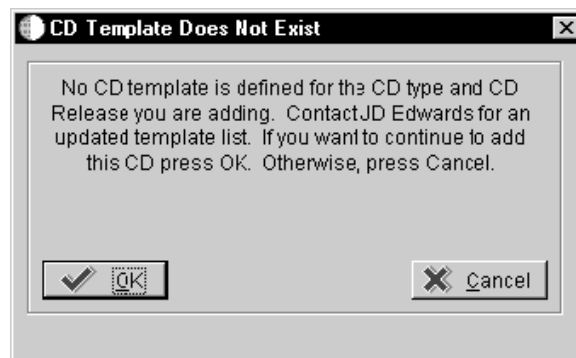
    If the template you chose via the Type field was set up to include packages, the CD Packages form appears.
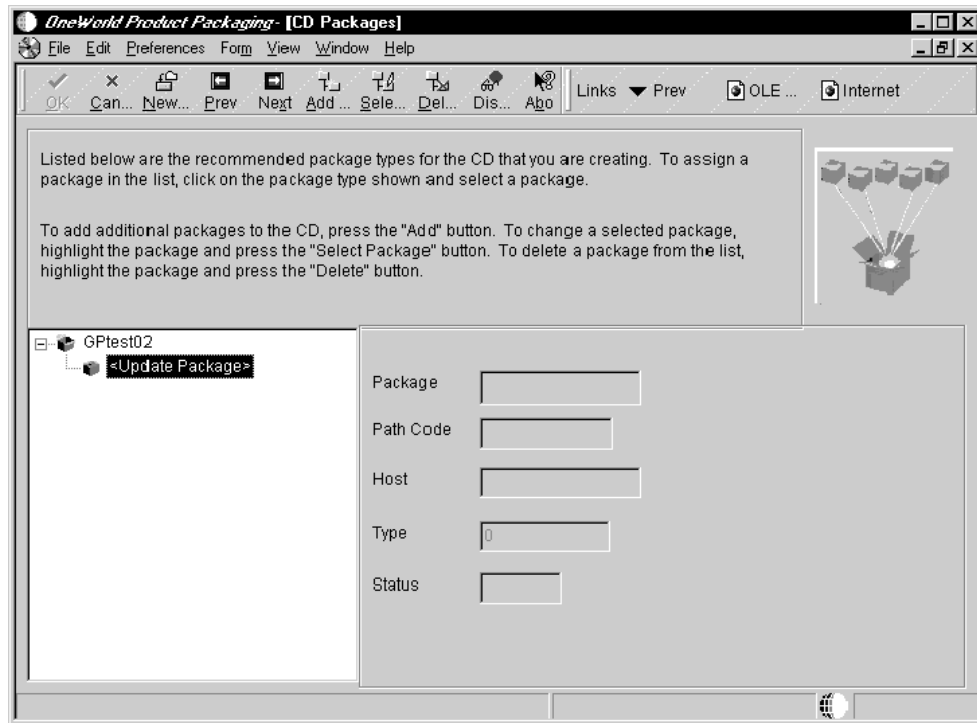
6. Choose the update package that includes the objects for the update disk. You can either select an existing update package or create a new one.

   Note:
   To ensure that the update package is defined correctly, note the following:

   - Use only update packages for this process.

   - The package name must be the same name as the product package previously defined, and must be all UPPERCASE letters.

   - The package should be created from scratch.

   - The update package must always include specifications, build specifications, build business functions, and compression. If the package is not compressed, then product packaging will not work correctly because Product Packaging only looks for cab files to copy to your image.

   - Ensure that the package build is activated and ready for build. For further information, refer to the *Package Management Guide* available on the J.D.Edwards Knowledge Garden.

7. If the package is undefined, the Select Package Build form automatically appears; otherwise, click Select Package. You can also add packages by clicking New Package Build or Package Assembly.

   The Select Package Build form appears.

8. If you need to assemble or define a package or both, choose one of the following from the Form menu:

- Pkg Assembly

  See "Assembling a Package" in the *Package Management Guide* for information about how to assemble a package.

- Pkg Build

  See "Defining a Package Build" in the *Package Management Guide* for information about how to define a package.

Note:
Make sure that you compress any packages that you build.

---

9. On the Select Package Build form, find and choose a package, then click Select.

   The CD Packages form reappears.

10. Choose the package marker that appears. For an ASU CD, there is only one package required. For other types of software masters there might be more than one package; see "Working with a Software Master Definition" in this guide for other features of this form.

11. Click Next.

   After you click Next, and if the template you chose was set up to include change table configurations, the Change Table Director form appears.
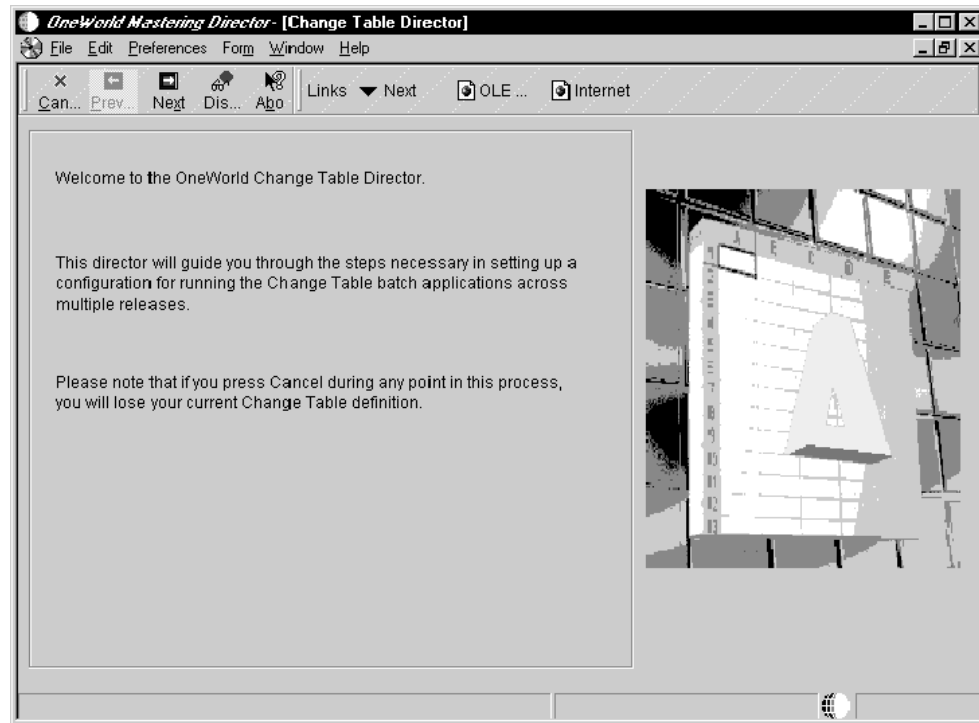
12. Continue to the next task, which explains how to configure your change tables.

Configuring Change Tables

This task explains how to set up a change table configuration using the Change Table director. Create change table configurations to indicate to the Product Packaging Tools the change tables you want included with the software master. When you install the finished software master, the installation process will update the enterprise's control tables with the change tables you indicate. See the "Glossary" in this guide for definitions of change and control tables.

The following example illustrates the need for change table configurations: The home office in Denver, USA makes some software changes and wants to update an enterprise that is not networked to the Denver enterprise. The other enterprise, which has its own set of ERP 8.0 software and control tables, is in Paris, France. The Denver enterprise creates a software master that includes the package containing the ERP 8.0 software changes as well as the change tables that contain data dictionary and user defined codes changes, which for this example are the only control table changes since the Paris enterprise was last updated. The Denver enterprise writes the software master to a CD and ships it to Paris. When the Paris enterprise installs the software master, the change tables will update the Paris control tables, which will make the tables concurrent with the Denver control tables.
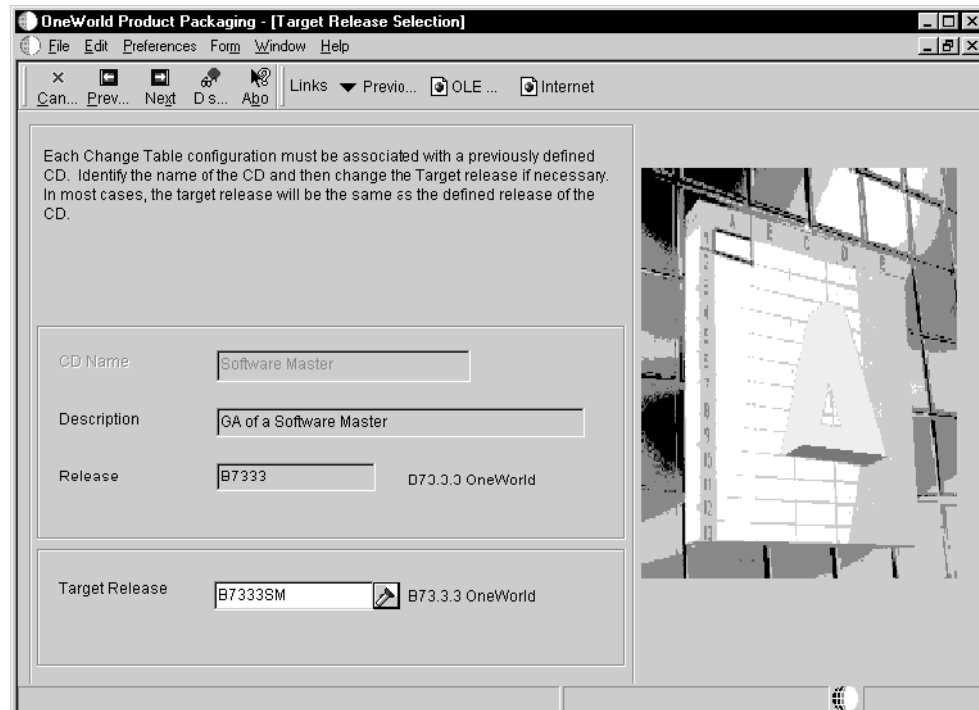
▶ **To configure change tables**

From the Change Table Director, which automatically appears during the mastering process if required by the template:

1. Click Next.

Alternatively, you can access the director from Product Packaging (GH962). Choose Change Table Configurations (P9642) and when it appears, click Add. On the Change Table Director, click Next.

The Target Release Selection form appears.

2. Complete the following field:

    *   Target Release

        Change the target release to a custom UDC name that you are mastering. This name needs to be unique, such as B7334TAX for the 1099 tax update. Choose the release name using the visual-assist button.

        Note:
        The software will not function correctly if these tables have the same value for the source and target release. To add the custom UDC, press the visual assist and then click the form exit "Revisions". This action displays the Work with User Defined Codes screen. On this screen, click Add. Scroll to the bottom of the grid and add in the new value in the last line of the grid. Once you have created the UDC, choose the new UDC on the User Defined Code form, and click Select. This action will populate the Target Release field with the new value.

        ---

3. Click Next.

    The Source Environment Selection form appears.
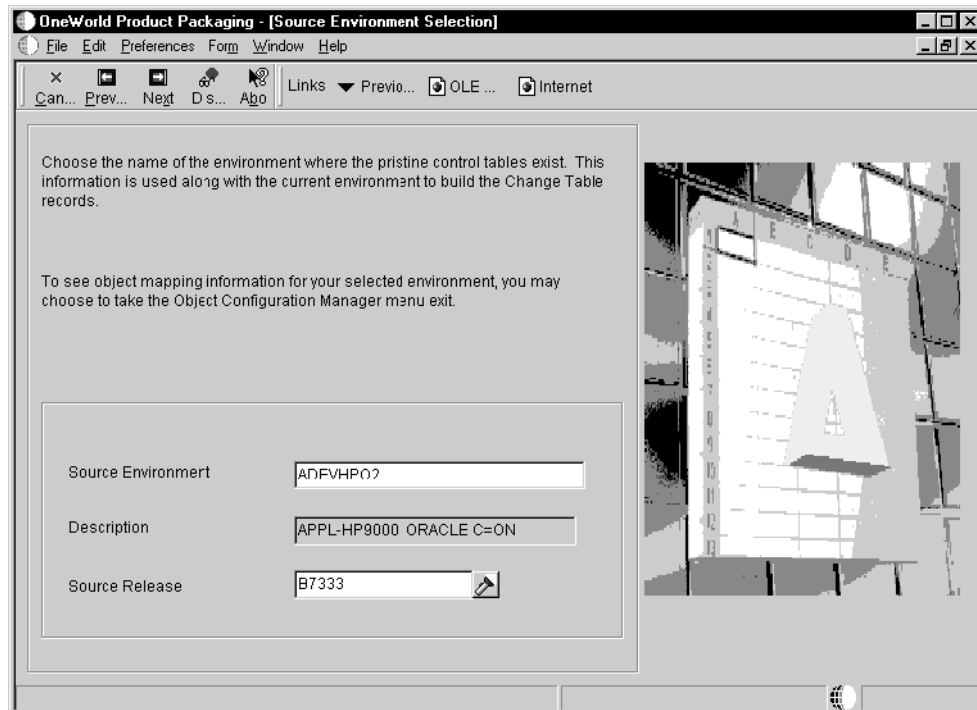
4. Complete the following fields:

- Source Environment

  Enter the name of the environment that includes the control tables used as the baseline for your changes. The source is typically the pristine environment (JD7334). ERP 8.0 builds the change table records by comparing the target environment to this baseline.

- Source Release

  Verify that the source release matches the release and the cumulative update level, such as B7334, of the source environment that you want. ERP 8.0 automatically populates this field based upon the source environment.

5. Click Next

  The Batch Application Selection form appears. This form lists the available change tables along with the batch application and version that will create the change table.
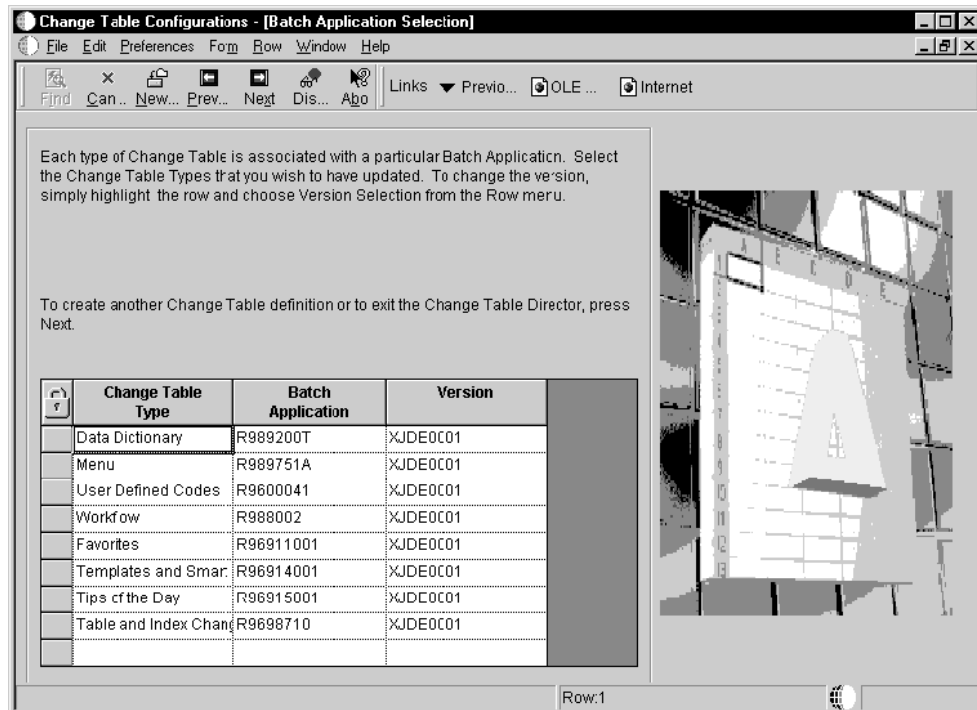
6. To choose the default change tables that you want with your software master, double-click the gray button to the left of the change table row. A checkmark appears on the button.

> Choose any or all of the following change tables where you made additions, deletions, or changes. The batch process compares the source and target tables in each selected category and creates a change table that contains all changes.

- Data Dictionary

- Menu

- User Defined Codes

  > This batch application should always be selected because these are always changes to the UDC defining the release.

- Workflow

- Favorites

- Templates and Smart Fields

- Tips of the Day

- Table and Index Changes

Note:
You can double-click on a checkmark to remove it.

7. To choose a different version or to choose multiple versions, choose a change table row and from the Row menu, choose Version Selection.

> The Version Selection form appears.
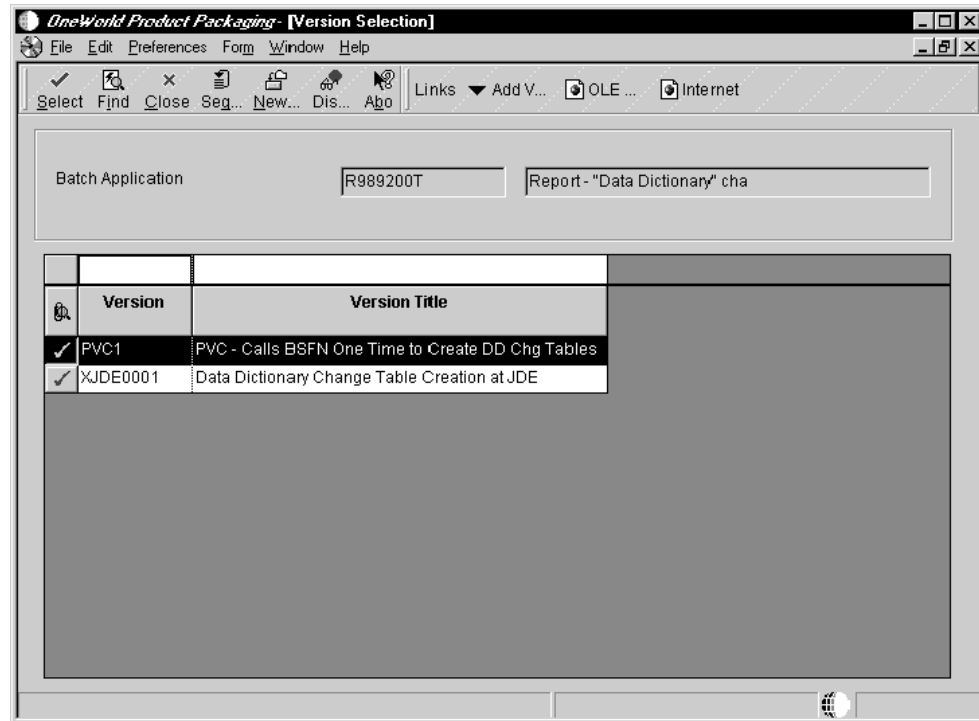
8. Choose one or more versions and click Select, or double-click the gray button to the left of a version.

> A checkmark appears to the left of the versions you chose.

9. After choosing the versions that you want, click Close.

> The Batch Application Selection form reappears.

> A checkmark appears to the left of the change table row you chose. The change tables that you want built for the software master must have checkmarks next to them or ERP 8.0 will ignore them. If you chose more than one version, the word <MULTIPLE> appears under the Version column for that change table.
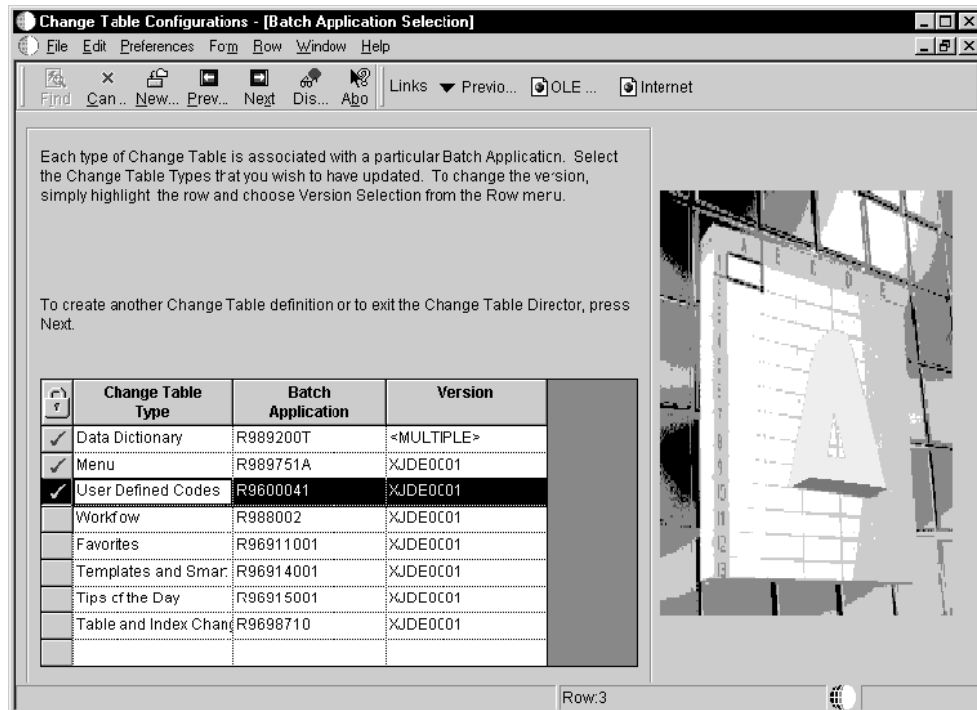
10. Either choose another change table row and from the Row menu choose Version Selection, or click Next.

If you click Next, the Additional Change Table Definitions form appears.
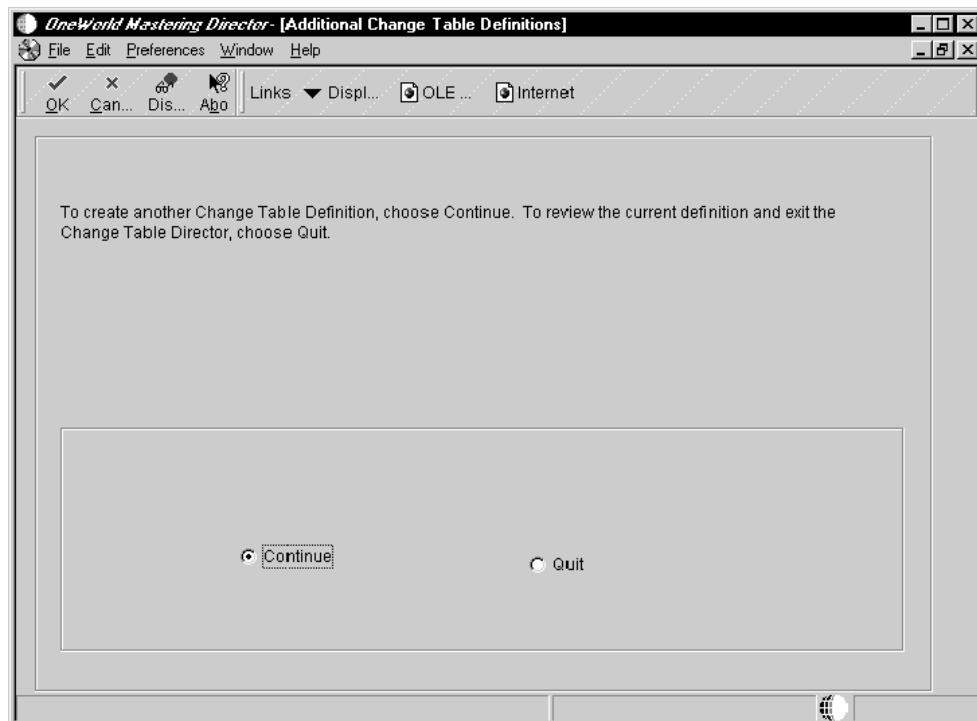
11. Complete one of the following:

- To define additional change table configurations for a new source and target release combination, choose Continue and click OK. The program displays to the Target Release Selection form. Return to the beginning of this task and repeat the steps for a different source/target combination.

- Choose Quit and click OK. This actions will stop the change table configuration director and display the final revisions screen for mastering the defined CD

  If you chose Quit, the CD Revisions form appears. Use this form to revise your software master definition. See "Revising a Software Master Definition" and "Revising or Submitting Change Tables" in this guide for information about revising what you just created.

12. On CD Revisions, click OK.

   This saves your software master definition and the CD Revisions form disappears.

13. Continue to the next task, which explains how to validate the definition you just created.

Setting the Package Build Application to the Mastering Mode
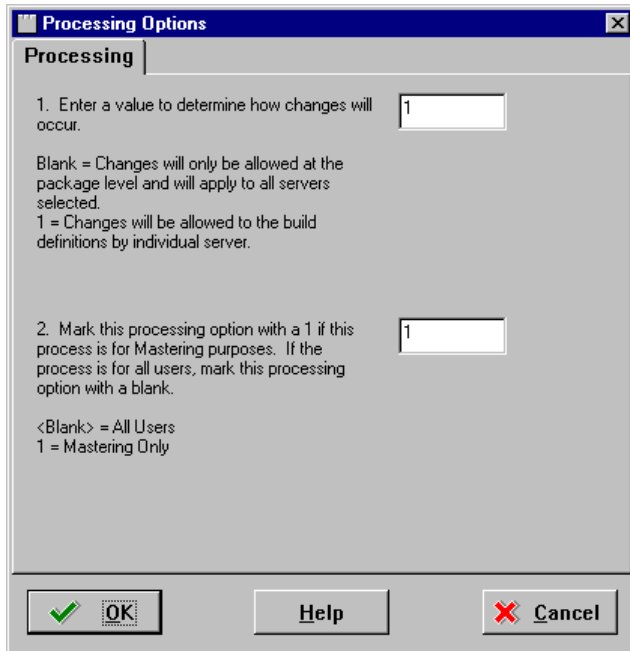
To compress an update package, the package build application must be set in mastering mode. Complete the following task to set package build in mastering mode:

► **To set the Package Build Application to the Mastering Mode**

1. On the Deployment server, sign onto ERP 8.0 in the DEP7334 environment.

2. From menu GH9083, right click on Package Build, and select prompt for values.
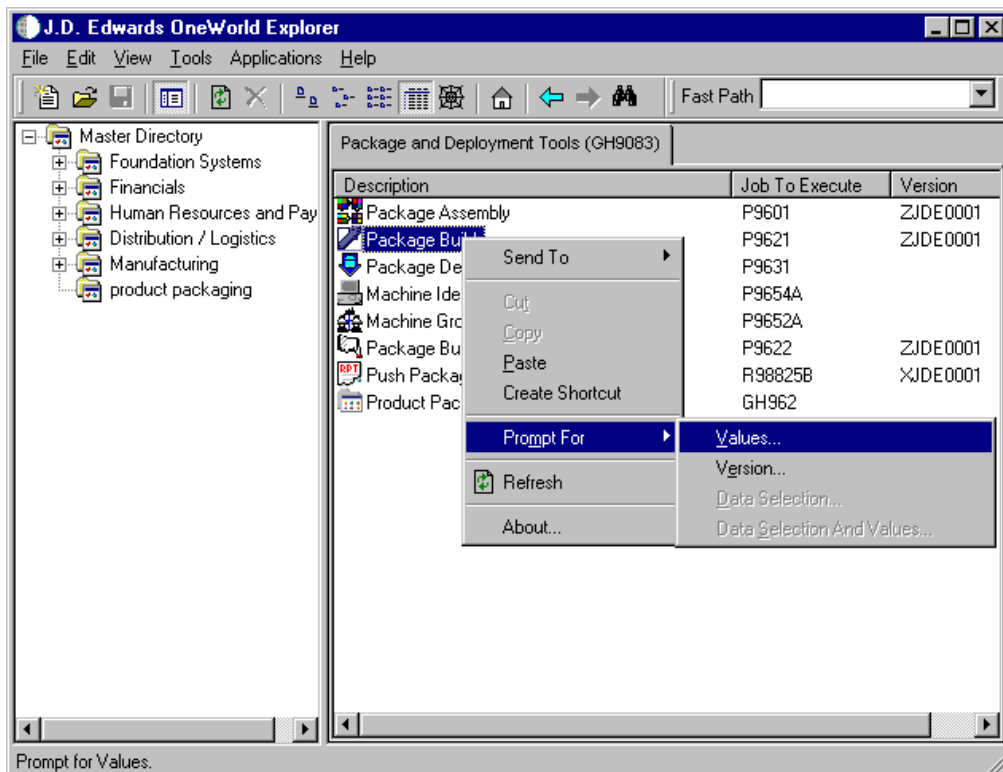
3. On Processing Options, type '1' in option 2 to set up the mastering mode.

Processing Options

Processing

1. Enter a value to determine how changes will occur. `1`

Blank = Changes will only be allowed at the package level and will apply to all servers selected.
1 = Changes will be allowed to the build definitions by individual server.

2. Mark this processing option with a 1 if this process is for Mastering purposes. If the process is for all users, mark this processing option with a blank. `1`

<Blank> = All Users
1 = Mastering Only

✔ OK   Help   ✖ Cancel

4. Click OK.

5. Exit out of the package build application.

Validating a Software Master Definition

This task explains how to run a report (R9640A) to validate the software master definition that you set up and what to look for in the report to help with your validation. The report runs in final mode. The report lists whether the build step is validated or not. The report will change the status of those build steps that do not have errors.

► **To validate a software master definition**

From Product Packaging (GH962), choose OneWorld Product Packaging (P9640).

The Work With Software Mastering form appears.

1. Click Find.

    The existing software master definitions appear.

2. Choose the master you want to validate, and click Validate in the Row Exit menu.

    The Report Output Destination form appears.

3. Select to view the report online using Acrobat Reader, and click OK.

    The report runs. All steps without errors whose status was In Definition (10) or Defined (20) are promoted to the status of Validated (30) and they will work properly during the software mastering process. Otherwise, the build step will have either a warning or an error message:

    •   Warning messages will not stop the creation of a software master. If a build step has a warning message, you should verify that the build step is how you want it to be before proceeding. Note that the report will always include a warning stating that the build step is different from the template. This warning is always true because the process uses a custom package build.

- Error messages will stop the creation of a software master. You must fix any build steps that contain error messages. The message specifies the error.

4. Continue to the next task, which explains how to create the final software master.

Creating a Final Software Master

This task explains how to create the final software master image from a definition that you previously created. You can master a single definition, or choose to master all definitions of a specific ERP 8.0 release.

The report that accomplishes this task is R9640B. This report controls the execution all of the build steps and the UBEs associated with the build steps. The report also changes the status of each build step from 30 – Validated, to a new status of 60 – Built or 50 - Failed.

Build Time

With an average workstation, network, and ERP 8.0 environment, the mastering process should take about an hour. However, ERP 8.0 includes many variables that can affect the time it takes to build a product package CD:

- Status and level of debugging

- Number of objects in the update package

- Size of the objects in the update package

- Overall size of the parent package

- Number of change tables to define

- Network speed

- Type of database

- Build machine speed

- Build machine memory

- Number of other processes running on the Enterprise Server, Deployment Server and Build Machine

Before You Begin

❑ Ensure that at least 1GB of space is available for the TEMP directory of the workstation from which you use the Product Packaging Tools. This memory requirement is the most memory you might need for a software master. The actual size of the master depends upon the size of the package you create.

► **To create a final software master**

From Product Packaging (GH962), choose OneWorld Product Packaging (P9640).

1. On Work With Software Mastering, complete one of the following:

   - To create a software master from one specific definition, click Find, then choose the definition you want to create, and click Master CD from the Row Exit menu.

   - To create software masters for all definitions of a specific release, click Master Release from the Row Exit menu. A form appears in which you enter the release number of the definitions you want to master.

   Either choice runs a batch process (R9640B) that creates your software master based upon the definition you chose. Run the report locally and "On Screen." Depending on the build steps to complete, the report launches several other reports, each corresponding to a particular build step.

2. The software mastering process will stop when it encounters a manual build step. To complete the manual build step, choose that build step, and click Execute Step from the View Exit menu. This advances the status of that step to 60 (Built). Click Master CD or Master Release to continue the software master process.
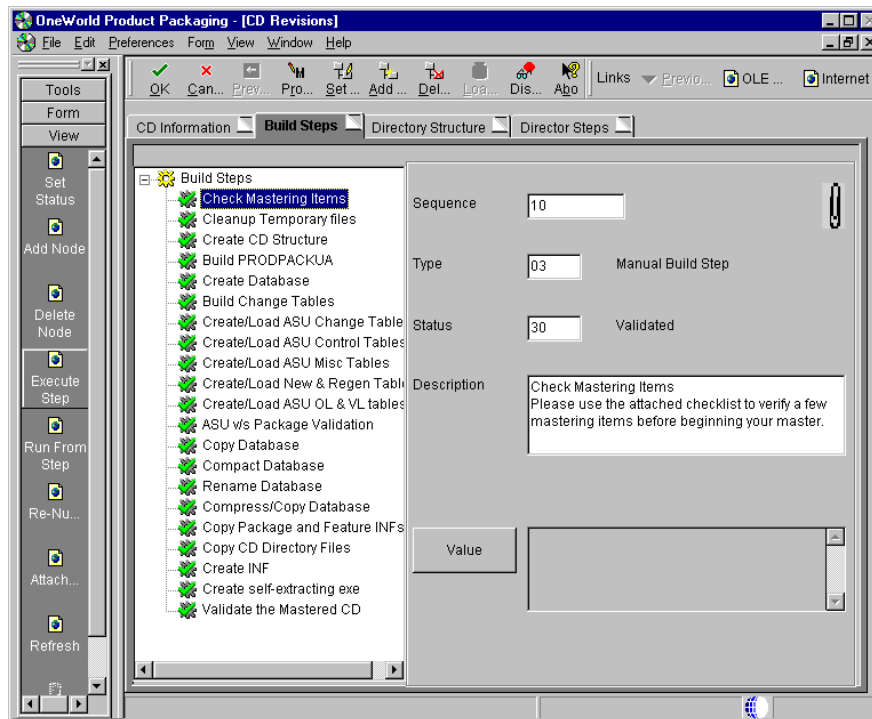
See "Revising a Software Master Definition" in this guide for more information about build steps.
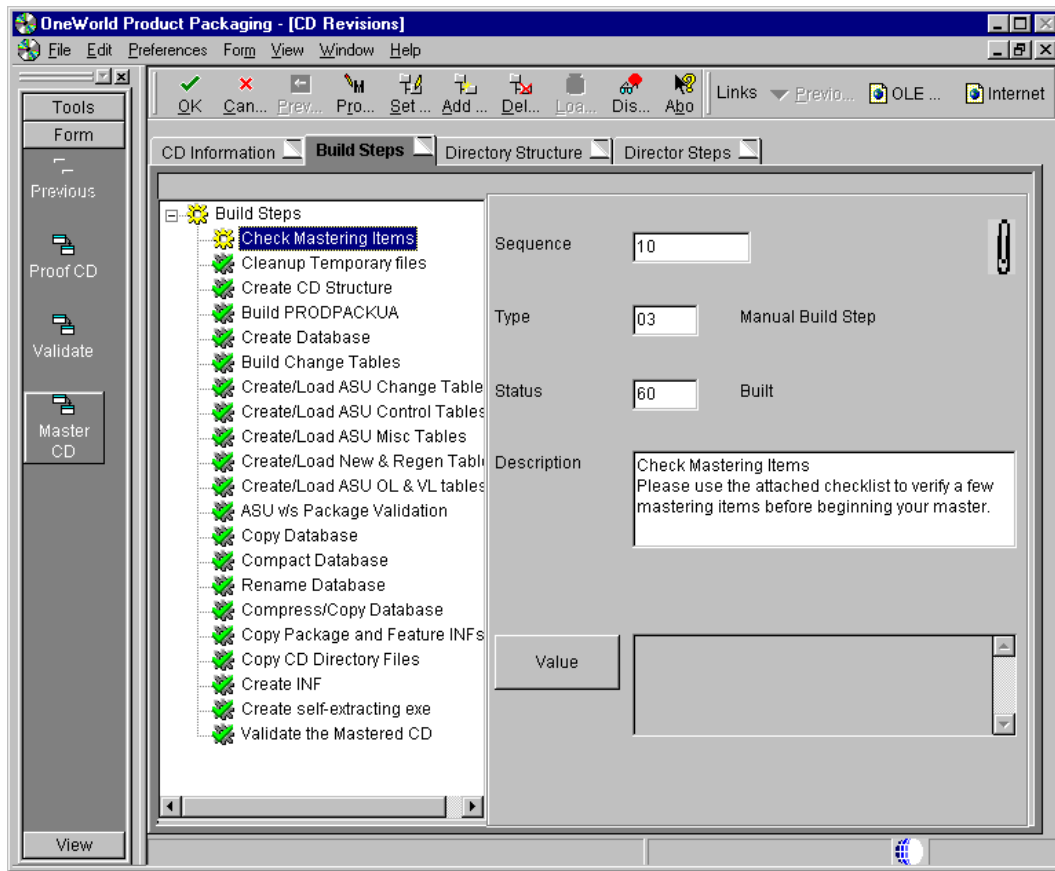
3. The progress of the build can be monitored from the CD Revisions screen. From the View exit, choose Refresh. As each step is processed and completed, the icon cog will change color and style.

4. The last build step automatically validates your software master and generates a final report (R9840B) This report includes a comprehensive status of the product package build. Review this report for errors.

Adobe Acrobat - [R9640B_XJDE0002_D1001127_T070104496.pdf]

File Edit Document Tools View Window Help

Final

Name	ProdPackUB		
Description	Product Package Update B		
CD Release	B7333	B73.3.3 OneWorld	
Phase	General Availability		
CD Type	Application Software Update		

CD built successfully

Build Component Description	Build Sequence	Step Description	CD Component Status	
Manual Build Step	10		Already Done	Check Mastering Items
				Please use the attached checklist to verify a few mastering items before beginning your master.
Batch Process	20 UBE	R9640L\XJDE0001 R9640LVXJDE0006	Built	Cleanup Temporary files
Create the CD File Structure	30		Built	Create CD Structure Creates the skeleton CD structure on the 'image' path.
Package Build	40 PRODPACKUB/PY7333		Built	Root\planner\Package\PRODPACKUB
Batch Process	50 UBE	R9640F\ZJDE0002 R9640K\XJDE0001	Built	Create Database Create 'jdeb7.mdb' / Drop all tables if it already exists
Build Change Tables	60 UBE	R989200T \XJDE0001 R989751A \ZJDE0001 R9600941 \XJDE0001 R988002 \XJDE0001 R96911001 \XJDE0001 R96914001 \XJDE0001 R96915001 \XJDE0001 ...\...	Built	Build Change Tables This will build the change tables based on the configuration that was setup during the director phase.
Batch Process	70 UBE	R9670X\XJDE0003	Built	Create/Load ASU Change Tables Copy the completed change tables to the 'jdeb7.mdb'
Batch Process	80 UBE	R9670X\XJDE0001	Built	Create/Load ASU Control Tables This creates and populates the ASU control tables
Batch Process	90 UBE	R9670X\XJDE0002	Built	Create/Load ASU Misc Tables This creates and populates the ASU misc tables
Batch Process	100 UBE	R9670X\XJDE0001	Built	Create/Load New & Regen Tables This creates (and copies data into) tables marked as new in the table change table and table marked as regen in the table scheduler

100%   1 of 2   11 x 8.5 in

If the validation report does not show any errors, you have successfully created a software master. This report validates that the number of directories match between the software master definition and the final software master. It also provides details about the file counts and the total size of the master in megabytes.

This process automatically creates a self-extracting executable file and a CAB file and places them in the $TEMP/final directory using the name of the software master followed with the .exe and .cab extensions. Use the executable (.exe) file to update ERP 8.0. Both files include the full software master with all of its directories. If you have a size restriction, such as when downloading from the Internet, you can use the CAB file (which is always smaller than the executable file), but you will need to use a third-party application to uncompress the CAB file.

Confirming the Software Master

After you create the software master image, you should visually check the directory structure and jdeb7.mdb database to verify that the image is complete.

▶ To Confirm the software master

1. In Windows Explorer, open the image path directory. Check that the package directory includes the following files:

   - install manager files
   - planner directory
   - a data cab in the planner directory
   - a directory named the same as your package
   - cab files in your package directory.

2. Verify that the $TEMP\final directory includes two files: *packagename*.cab and *packagename*.exe.

3. Open the jdeb7.mdb in the $TEMP\master directory, and verify that this database is populated with tables.

If your package includes new custom tables, verify that they are in the jdeb7.mdb database, and that these tables and their associated index change tables have records.

Moving the Software Master to a CD ROM

Once the software master process has been completed and confirmed, the image can be burned on to a CD.

► **To Move the Software Master to a CD ROM**

Using a CD burner and CD burner software, copy the *packagename*.cab or *packagename*.exe file from the $TEMP/final directory onto the CDROM.

Updating ERP 8.0 with the software master

This task explains how to update ERP 8.0 using the software master you created. This update in ERP 8.0 is done by accessing an application called Software Updates (P96470) from the GH961 menu. This process includes setting merge flags, running the self-extracting executable (*packagename*.exe), running software updates, and executing installation workbench. For detailed instructions to complete this task, see the *Software Update Guide*.

Before You Begin

❑ You must install the correction ESU JD2325 (SAR 4465163) for Software Updates before you install the product package. This is a one-time process that needs to be completed on the destination deployment server.

► **To update ERP 8.0 using a software master**

On the deployment server:

1. Complete the Customer Preparation tasks described in the *ERP 8.0 Software Update Guide*.

2. Run the *Product_Package*.exe executable file from the CD.

The process installs the package into the Planner\Package directory on the deployment server, and extracts the *Product_Package_Name*.mdb file into the Planner\Data directory. The process also creates the software master image in the PLANNER directory.

> **Note:**
> You can also use the CAB file to create the software master image on your deployment server, but you need to use a third-party application to uncompress the file.

3. If InstallManager.exe exists on the CD, start the installation by double-clicking on this executable file. If this file is not on the CD, double-click on the PACKAGE_NAME.exe file.   This will self-extract and uncompress the CAB file.   Once uncompressed, the Install Manager will automatically launch.
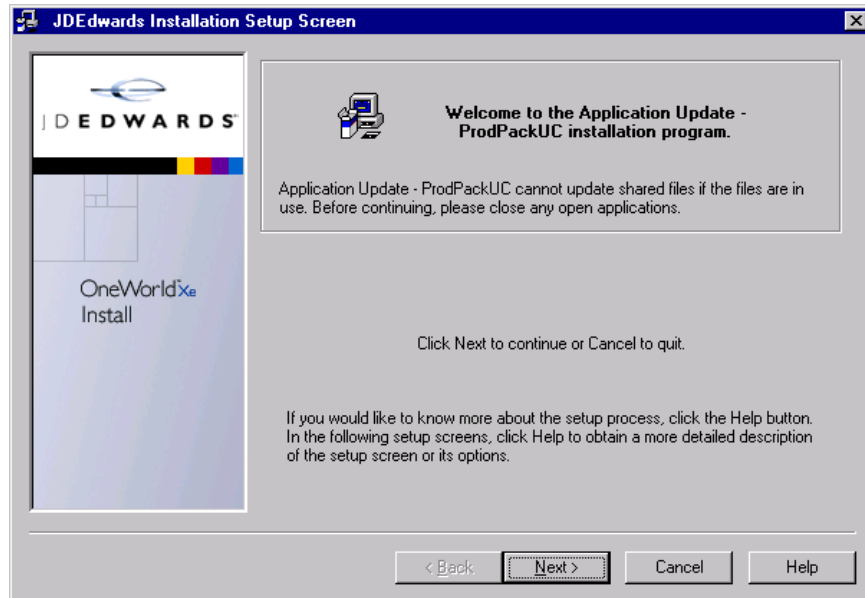
4. On the Installation Setup Screen, click Next.
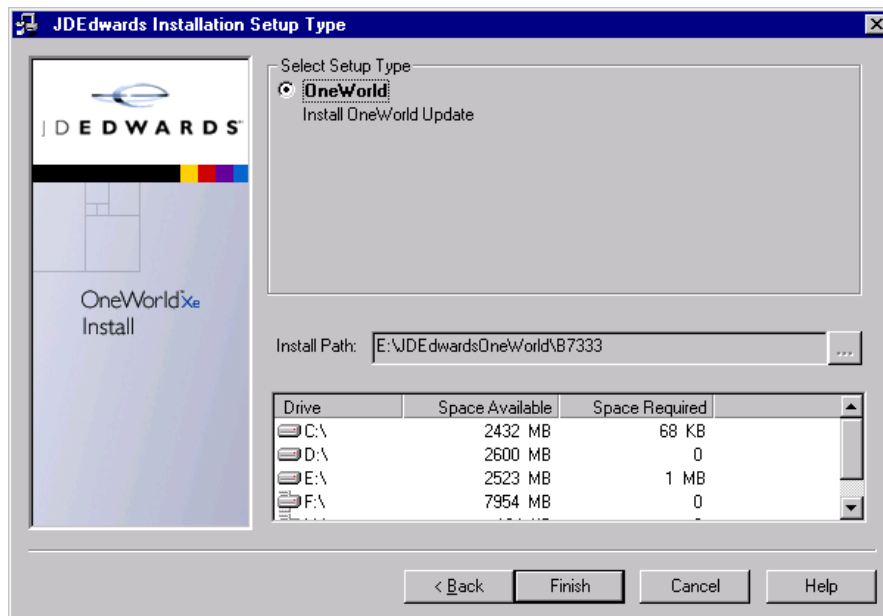
5. On the JDEdwards Installation Setup Type screen, verify that the machine has the necessary disk space and that the Install Path is correct. To proceed, click Finish.

6. When the installation is complete, the Install Manager displays the following window.

Installation Complete

JDEdwards Installation Succeeded!

Thank you for installing Application Update - ProdPackUC.

OK
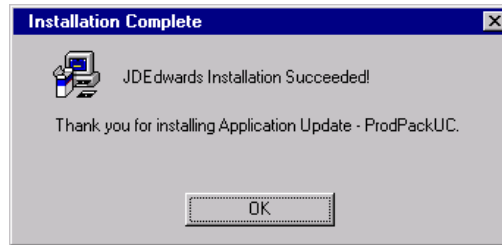
7. Click OK.

8. Sign onto ERP 8.0 on the Deployment Server in the Planner environment.

9. Type the Fast Path to menu GH9612.

10. Double-click on Software Updates (P9640).

Processing Options

Default | SAR Search

Enter the Default value to be used.

Software Update Type   02

✔ OK   Help   ✖ Cancel
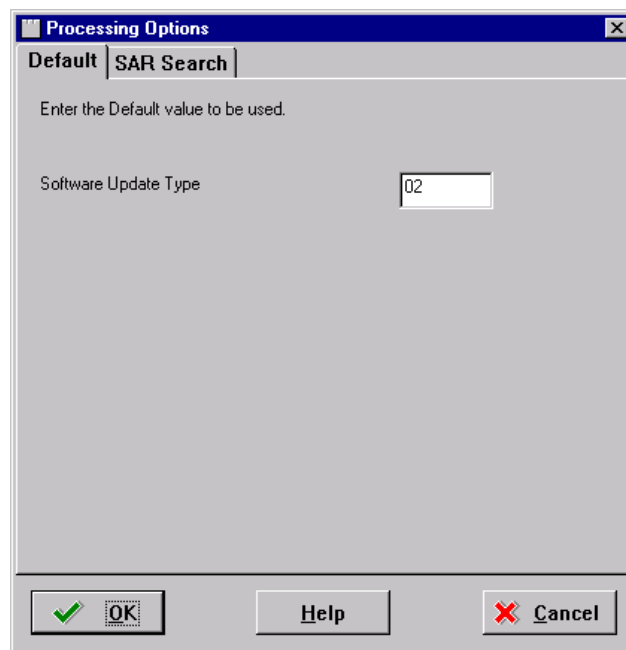
11. On Processing Options for Software Updates, change the Software Update Type to '02' – Application Software Update, and click OK.

12. On Work with Software Updates, click Find.
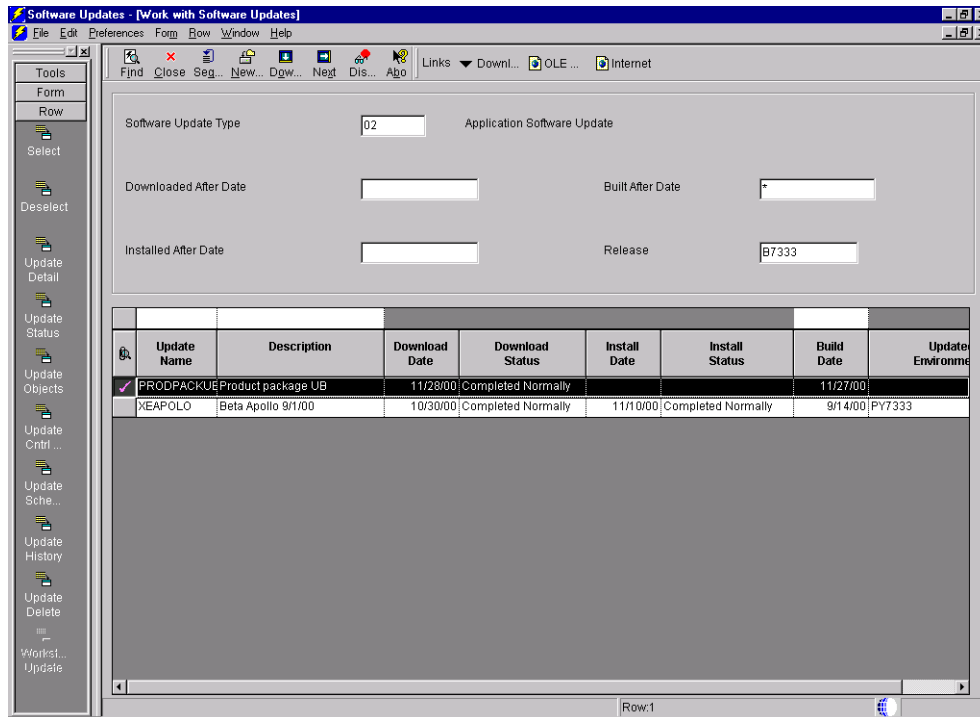
13. Choose the product package to install, and click Next.
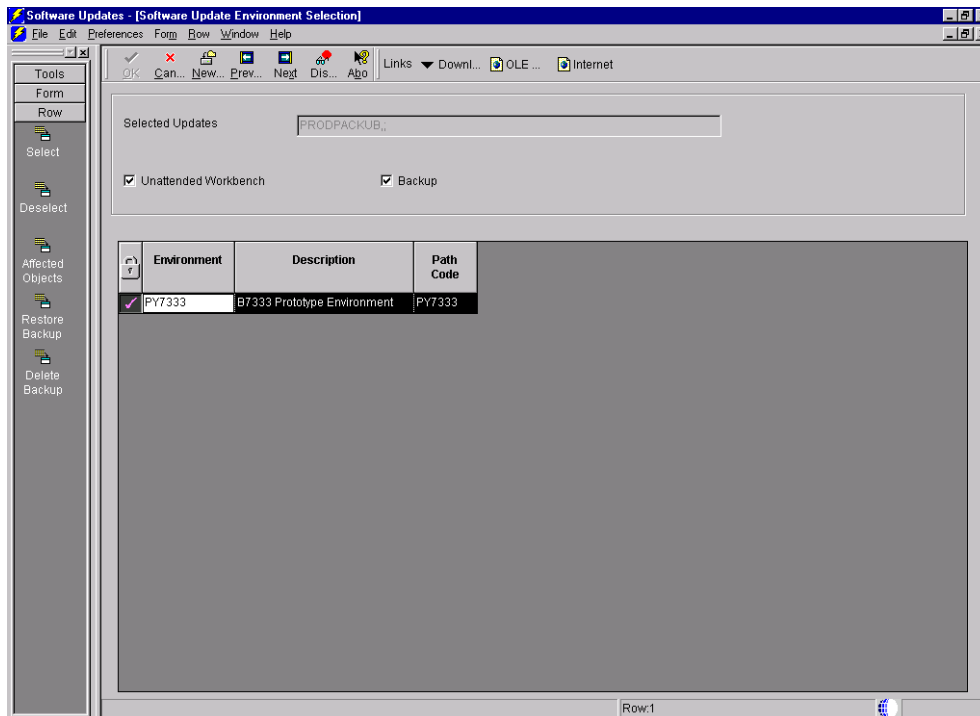
14. On Software Update Environment Selection, choose the pathcode(s) to install the package onto, and click Next.

> If unattended mode is selected, the Installation Workbench will automatically perform all the workbench tasks to complete the installation. If unattended mode is not selected, the installation workbench must be stepped through manually. If backup is selected, the process will create an Access database called backup.mdb in the

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Planner\Package*Package_Name**PathCode*.bak\data directory. Only the tables and objects affected by the update will be backed up in the database.

The Installation Workbench should stop after the Table Conversion workbench is complete.

15. Review the PDF's and the log files created by the table conversions, then continue with the Installation Workbench.

16. When the Installation Workbench is complete, Software Updates returns to the Work with Software Updates screen, and the selected software update should have the install status of "Completed Normally".
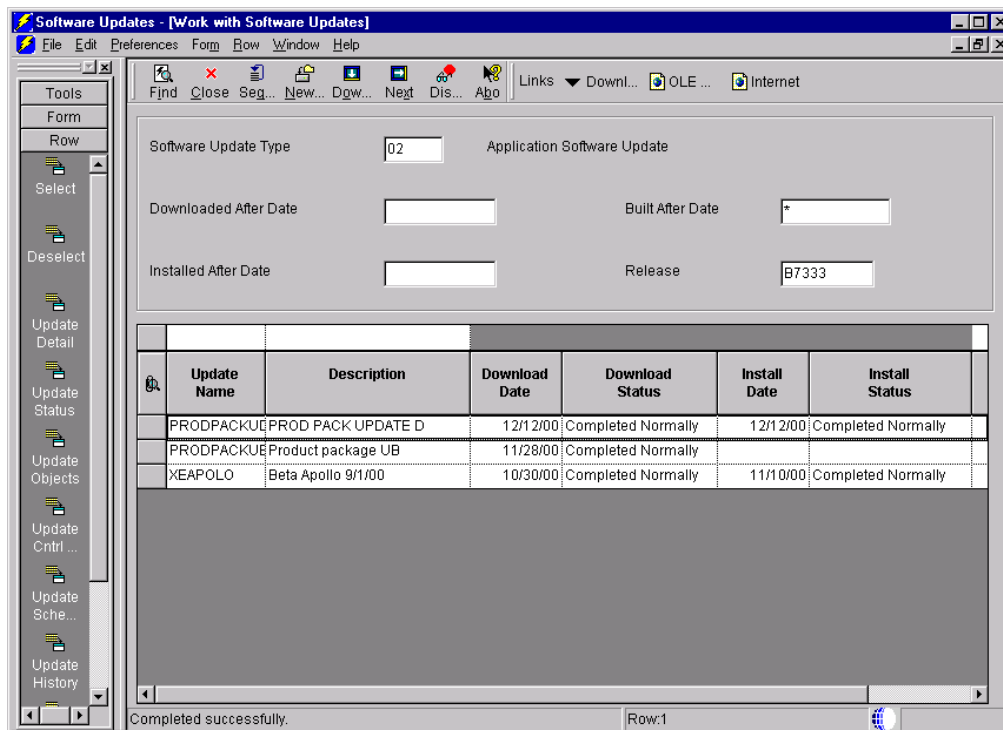
17. Click Close to exit out of Software Updates.

18. Review all the PDF files generated on the deployment server by the software update process, and verify that each of these reports is error free.

If a report has errors or doesn't appear to run, review the jde.log file to determine the source of the problem. The table below includes descriptions of the Software Update reports.

Report	Version	Description
R98405 – Application	XJDE0001	Table Conversion/Merge Driver for Application Tables: Master UBE for creating and regenerating application tables. This report should have only one record: the Table and Index Creation F98407. The status of the record should be "Completed Normally".
R98407	XJDE0001	Table and Index Creation: Launched by R98405 Application UBE. This UBE creates/regenerates all tables specified in the table change table. The first page of the report includes source, target, and environment information. Page two includes the overall status of the table creation in green or red text. The subsequent pages are dedicated to listing the status of each individual table and index to be created/regenerated.
R98405 – Control	XJDE0001	Table Conversion/Merge Driver for Control Tables: This

		is the master UBE that specifies the control table merge UBEs to launch. In general, it should list three UBEs: Data Dictionary R989200P, UDC R9600042, and Menu F989751B. The status on all should be "Completed Normally".
R989200P	XJDE0001	Data Dictionary Merge: Launched by control table merge master R98405. This is the UBE that merges all data dictionary changes specified in the data dictionary change tables into the existing data dictionary. On the first page of the report is source, target, and environment information. The subsequent pages list the status of each individual data dictionary addition or change. At the end of the individual listings, the overall status of the data dictionary merge is listed in green or red text. The final page has detailed summary information.
R9600042	XJDE0001	User Define Code Merge: Launched by control table merge master R98405. This UBE merges all user define code changes specified in the UDC change tables into the existing UDC tables. The first page of the report lists the source, target, and environment information. The subsequent pages are dedicated to listing the status of each individual UDC addition or change. The final page has detailed summary information.
R989751B	ZJDE0001	Menu Merge: Launched by control table merge master R98405. This UBE merges all menu changes specified in the menu change tables into the existing menu tables. The first page of the report lists the source, target, and environment information. The subsequent pages list the status of each individual menu item addition or change. At the end of the individual listings, the overall status of the menu merge is listed in green or red text.
R98405 – Spec	XJDE0001	Table Conversion/Merge Driver for Specification Tables: Master UBE for specification table merge. This report should have only one record: Specification Merge F98700. The status of this record should be "Completed Normally".
R98700	ZJDE0002	Specification Merge: Launched by Specification Table master R98405. The UBE adds/replaces/merges all specified object specifications into the selected path code Central Objects. This report is the standard specification merge report. The first page of the report lists the source, target, and environment information. On the second page is summary information about the merge status. The remaining pages include the individual object action and status.

19. Find the package in the Package Assembly and build and deploy the update package to a client workstation.
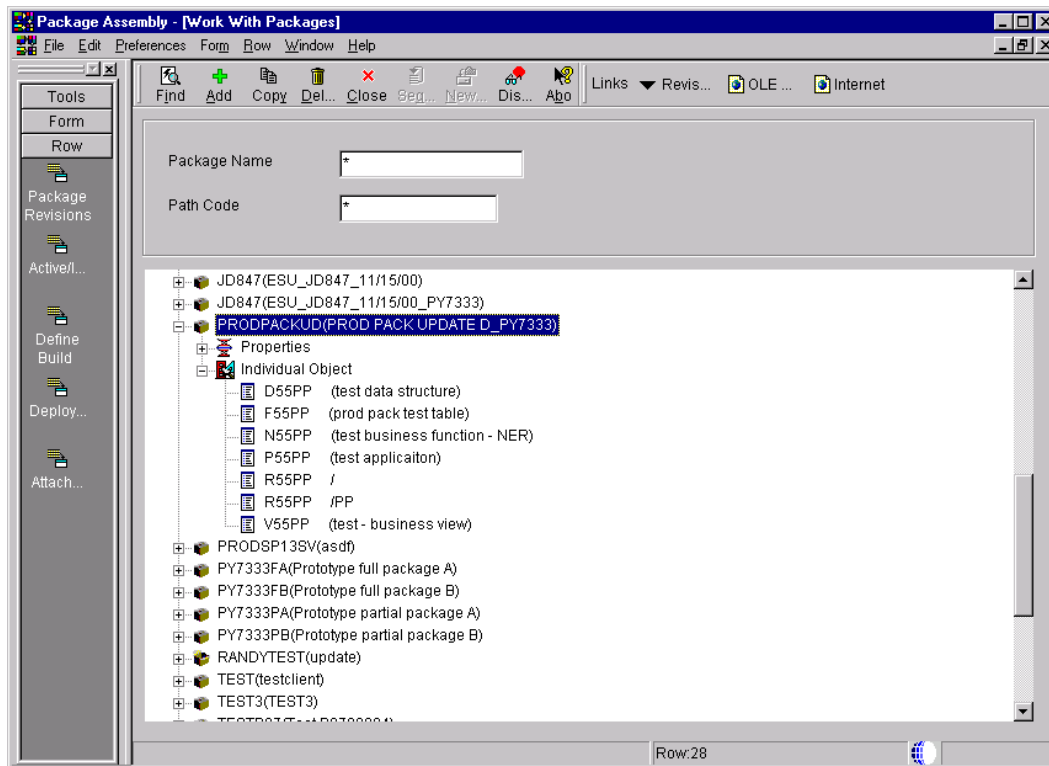
20. Open Object Management Workbench and view the new project with all the updated objects that were included in the Product Package.

45
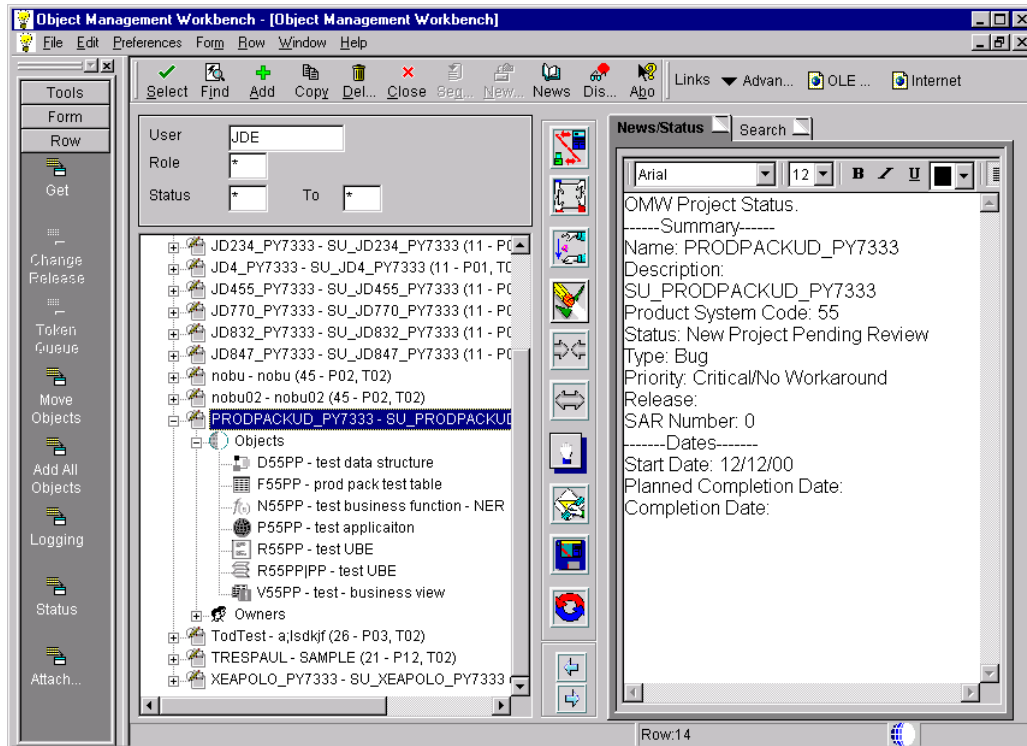
Software Master

This section explains how to repair and delete a software master after you have created it. This section also explains how to revise, copy, proof, validate, and delete a software master definition after you have created it.

See Also

- *Creating a Final Software Master* in this guide for information on how to convert your software master definition into the final software master that you can deploy to your enterprise.

- *Defining a Software Master* in this guide for information on how to create a software master definition.

Working with a Software Master

This chapter explains how to repair and delete a software master. Repair the master if you find that something is wrong with an object or that an object is missing. Objects in the software master refer to the following:

- ERP 8.0 objects (such as applications and business functions)

- Control/change tables (such as data dictionary items or user defined codes)

- Application data (such as the Address Book table)

Topics

- Adding a repair to a software master

- Deleting a repair to a software master

- Deleting a software master

Adding a Repair to a Software Master

This task explains how to repair a software master. You accomplish this by adding or revising objects and submitting them back into the final software master. Once you submit repairs back to the software master, you need to recreate the master.

See the "Software Master Creation" section in this guide for information on the software master process.

▶ **To add a repair to a software master**

From Product Packaging (GH962), choose OneWorld Product Packaging (P9640).

1. On Work With Software Mastering, click Find.

    Existing software masters and definitions appear.

2. Choose the master you want to repair. To repair, the master should have a status of 60 (Built).

3. Click Repair CD.

The Work with Master Repair Objects form appears. Use the tree structure to view what objects that you chose for repair to the master.
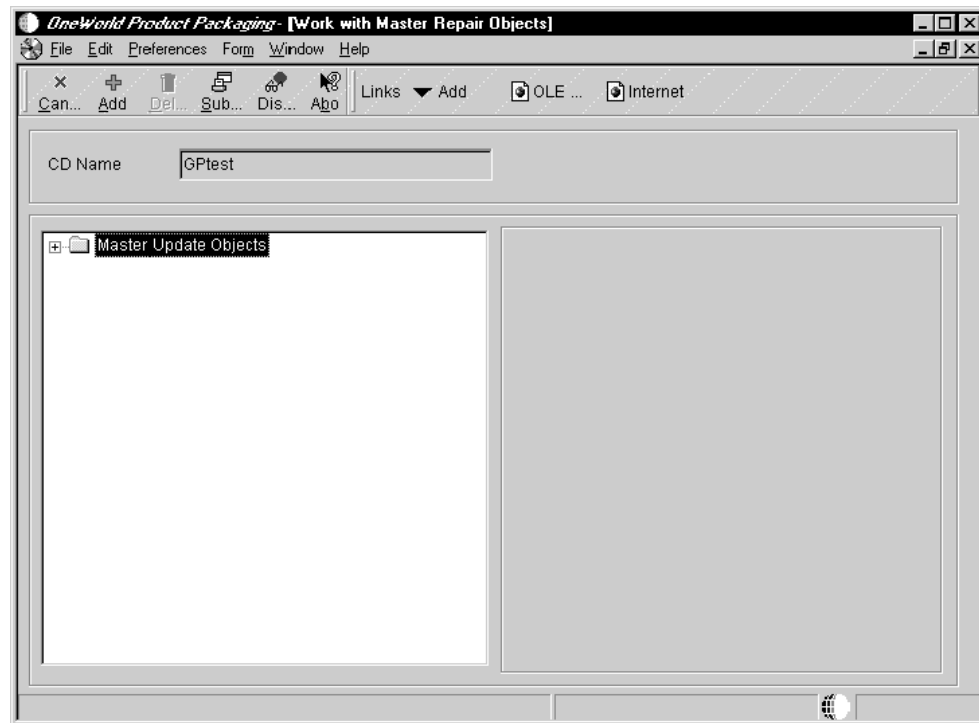
4. Click Add.

The Master Repair Director appears.
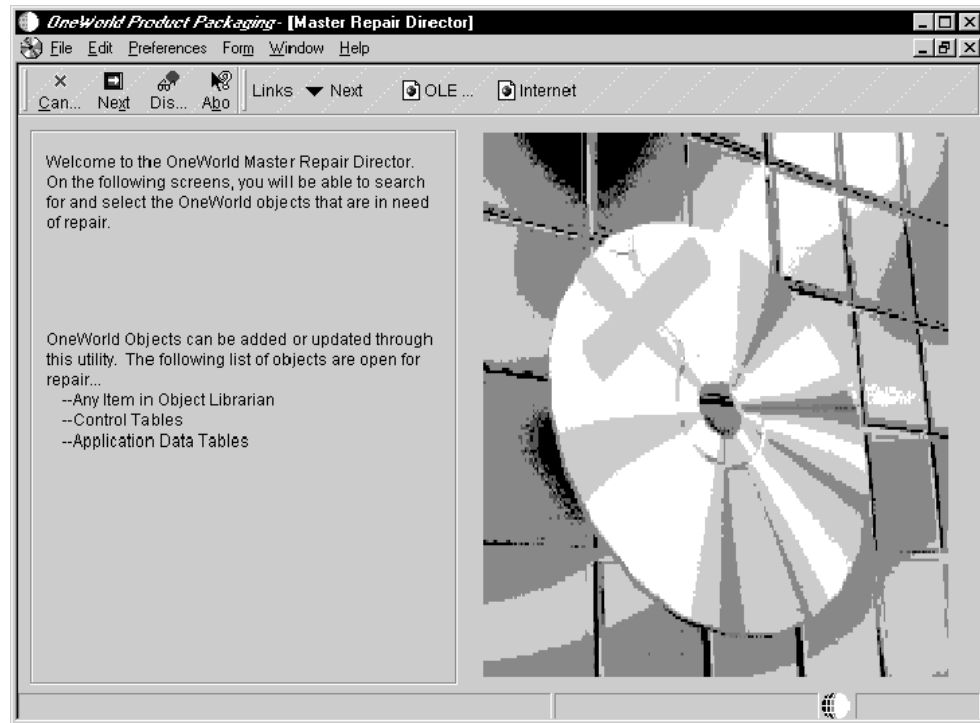
5. Click Next.

    The Master Data Locations form appears.

6. Click the CD Information tab.

7. Complete the following fields:

- Comment

  Enter or revise the comment for the software master.

- Pristine Data

  Enter the name of the data source where you want to store the software master's pristine data.

- SQL Data - **For J.D. Edwards Internal Use Only.** You can have these fields appear on this form by using the processing options for this application

- DB/2 Data - **For J.D. Edwards Internal Use Only.** You can have these fields appear on this form by using the processing options for this application

8. Click the Package Information tab. Use the tree structure to view the package(s) that are part of the software master. ERP 8.0 populates the Update Package Name field based upon your current package name and the repair number.
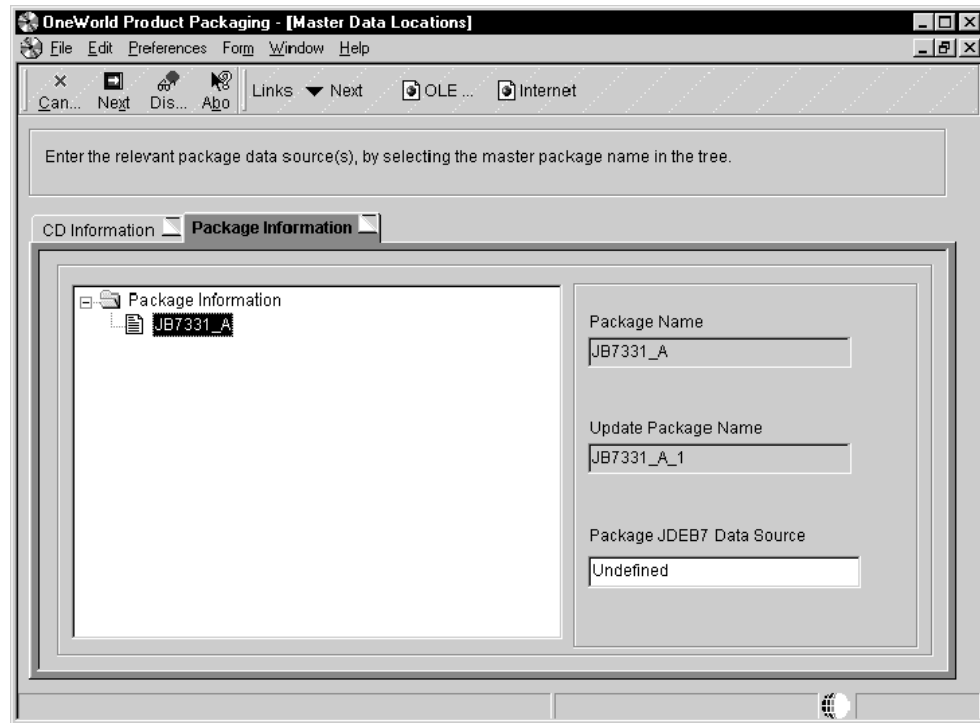
9. Complete the following field:

    - Package JDEB7 Data Source

      Enter the name of the data source for the package you chose.

10. Click Next.

    The ERP 8.0 Object Selection form appears.
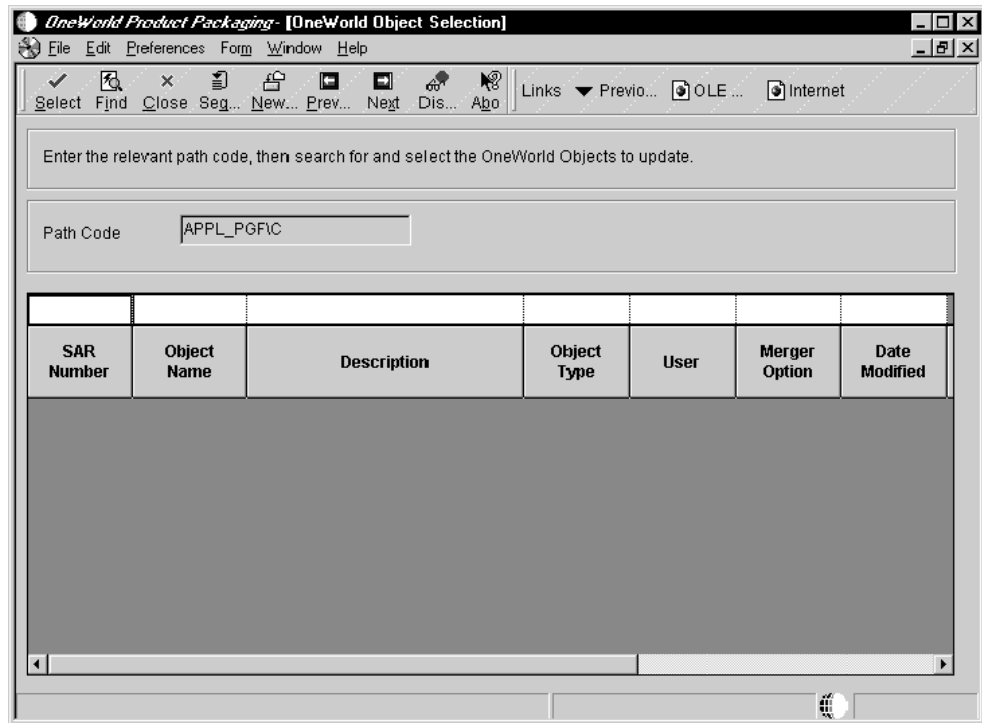
11. Find the ERP 8.0 object you want repaired to the software master.

12. Choose the object, then click Select.

    With each object you choose, that object is added to the list of objects you want repaired to the software master.

13. If you chose a batch application, the ERP 8.0 Version Selection form appears. Choose the version or versions you want included with the batch application, click Select, and then click Close

14. Click Next.

    The ERP 8.0 Data Selection form appears. Use this form to choose control/change tables and application data you want repaired to the software master.
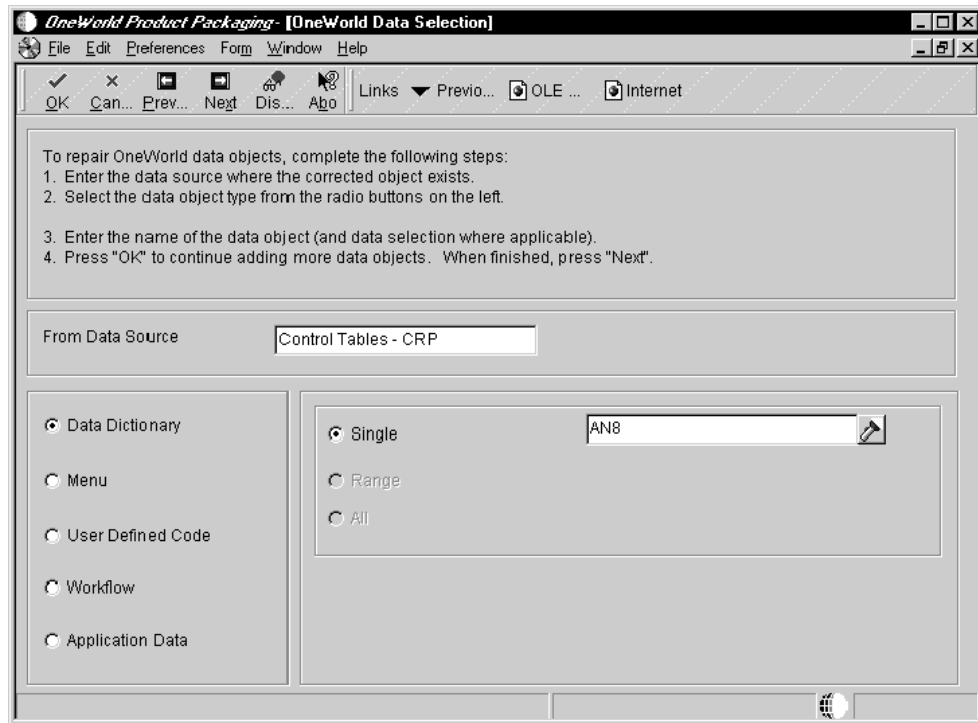
15. Complete the following field:

- From Data Source

    Enter the name of the data source that contains the object you want repaired to the software master.

16. Choose one of the following data-object types and enter the specific value(s) for that object:

- Data Dictionary

    Use the Single field to enter a data dictionary item that you want repaired to the software master. For example, enter AN8 to repair the Address Number data dictionary item.

- Menu

    Use the Single field to enter a menu that you want repaired to the software master. For example, enter G021 to repair the ActivEra menu.

- User Defined Code

    Two fields appear. To choose a user defined code, complete the Product and UDC fields, indicating the specific list of user defined codes you want repaired to the software master. For example, enter product code 98 and user defined code SY to repair the product code list.

- Workflow

    Choose the Single, Range, or All fields to choose a workflow process or processes. For example, enter 090003 into the Single field to repair the Set Up Business Unit workflow process.

- Application Data

    Use the Single field to enter application data that you want repaired to the software master. For example, enter F0101 to repair the Address Book table.

17. Click OK after providing the appropriate information for each data-object type that you want to repair. This allows you to continue choosing data objects.

18. Click Next after you finish choosing data objects.

    The Remaining Steps form appears.
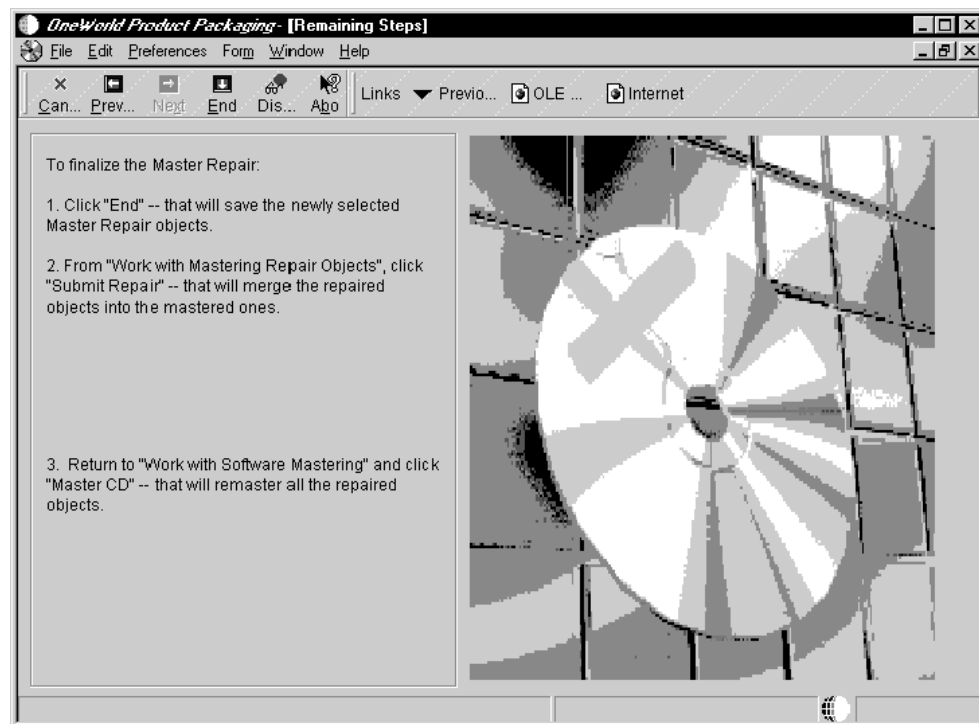
19. Click End.

    The Work with Master Repair Objects form appears. If you chose objects to repair to the software master, ERP 8.0 activates the Submit button on this form.
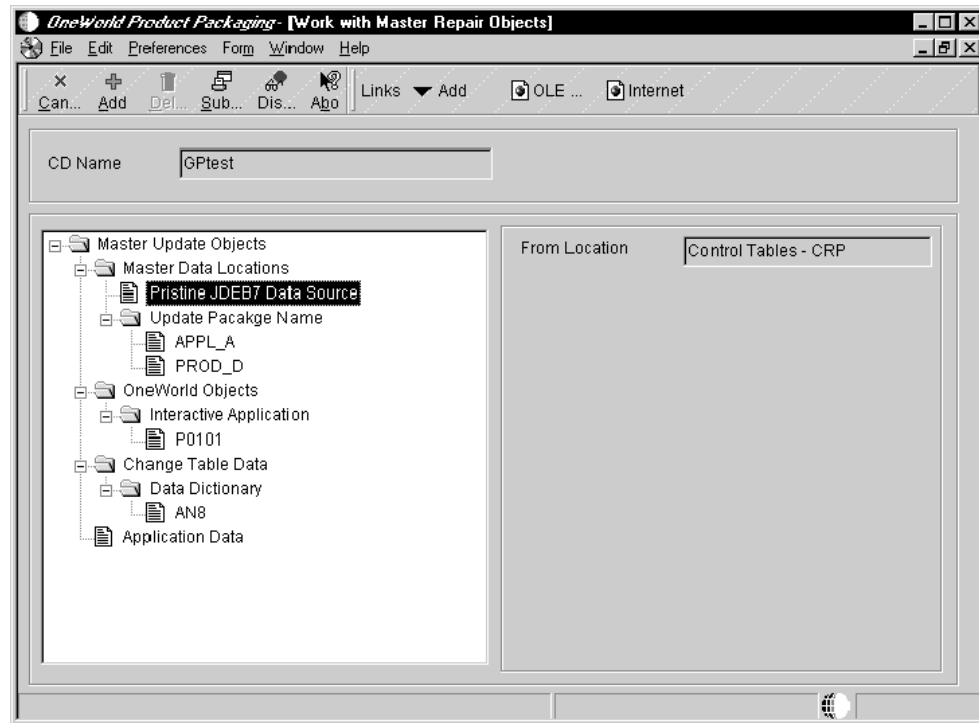
20. Click Submit Repair to move the chosen objects to the software master.

> This automatically runs a report that lists all of the items you chose for this repair. You can also run this report independently using the Batch Versions application; see "Submitting a Report" in the *Enterprise Report Writing Guide* for information about using the Batch Versions application. When running the report independently of repairing a software master, enter `R9645` into the Batch Versions application and use data selection to enter the name of the software master for which you want the report.

21. You need to recreate your software master to build the objects. See the "Creating a Software Master" topic in this guide for information.

Deleting a Repair to a Software Master

This task explains how to delete objects you chose for repair to the software master.

▶ **To delete a repair to a software master**

From Product Packaging (GH962), choose OneWorld Product Packaging (P9640).

1. On Work With Software Mastering, click Find.

2. Existing software masters appear.

3. Choose the master you want to repair, then click Repair CD.

> The Work with Master Updates form appears. Use the tree structure to view what objects you chose for repair to the master.

4. Choose an object, and click Delete.

Deleting a Software Master

This task explains how to delete a software master.

Important:

Everything associated with the definition will also be deleted, such as the change table configurations and repair director records.

▶ To delete a software master definition

From Product Packaging (GH962), choose OneWorld Product Packaging (P9640).

1. On Work With Software Mastering, click Find.

   Existing software masters appear.

2. Choose the master you want to delete, then click Delete.

   A message box appears asking if you are sure you want to delete the software master definition.

3. Click OK.

Working with a Software Master Definition

This chapter explains how to work with a software master definition after you have created one. Once you have completed the definition of a software master you can revise any of the information, which includes the build steps and directory structure. You can also copy the definition information to a new software master definition, delete the definition, and proof and validate it.

Revising a Software Master Definition

This task explains how to revise a software master definition that you already created. This allows you to revise the information you entered into the CD Configuration Director, as well as the build steps and directory structure included with the template that you chose.

If you need to add a new software master definition, see "Defining a Software Master" in this guide.

▶ To revise a software master definition

From Product Packaging (GH962), choose OneWorld Product Packaging (P9640).

1. On Work With Software Mastering, click Find.

   Existing software master definitions appear.

OneWorld Product Packaging - [Work With Software Mastering]

File Edit Preferences Row View Window Help

Select Find Add Copy Del... Close Seg... New... Vali... Mas... Rep... Mas...   Links ▼ Conve... OLE ... Internet

Release	Build Phase	Build Phase Description	CD Type	Type Description	CD Name	
B7333	03	General Availability	01	Setup CD	B7333 Change Tables	Pre-alpha
B7333	03	General Availability	09	Application Software U	QINGASU	Qing ASU
B7333	03	General Availability	09	Application Software U	Software Master	GA of a So
B7333	03	General Availability	09	Application Software U	TSTASUCD	Test ASU
B7333	03	General Availability	09	Application Software U	TSTASUCD1	T
B7333	03	General Availability	11	Custom CD	Change Table	
B7333	03	General Availability	11	Custom CD	Qing Test	Change T:
B7333	01	Alpha	01	Setup CD	B7333 Alpha Masters	B7333 Alp
B7333	01	Alpha	01	Setup CD	B7333 JanAlpha Masters	Mastering
B7333	01	Alpha	01	Setup CD	B7333 Pre-Alpha Testing	Pre-Alpha
B7333	01	Alpha	01	Setup CD	testing versions	
B7332	03	General Availability	01	Setup CD	B7332 GA Masters-SetupCD	GA- B733.
B7332	03	General Availability	09	Application Software U	10	Tools SP
B7332	03	General Availability	09	Application Software U	3298324	Freegoods
B7332	03	General Availability	09	Application Software U	4	Model
B7332	03	General Availability	09	Application Software U	7	Tools Mod
B7332	03	General Availability	09	Application Software U	ASU Creation	Application

Find records   Row:1

2. Choose the master you want to revise, then click Select.

The CD Revisions form appears.

OneWorld Product Packaging - [CD Revisions]

File Edit Preferences Form View Window Help

OK Can... Prev... Pro... Add ... Del... Loa... Dis... Abo   Links ▼ Procf... OLE ... Internet

CD Information | Build Steps | Directory Structure | Director Steps

Name   Software Master

Type   09   Application Software Update

Release   B7333   B73.3.3 OneWorld

Build Phase   03   General Availability

Status   20   Defined

Description   GA of a Software Master

Comment

Image Path... C:\B7

56

3. To refresh the information shown on any tabs on the CD Revisions form from the View menu, choose Refresh.

4. To validate the information shown on any tabs, click Validate. A report runs in proof mode to validate the definition. To run this report in final mode, see "Validating a Software Master Definition" in this section.

5. Click the CD Information tab and revise the following fields:

   - Status

     Verify the status of the software master definition.

   - Description

     Optional. Enter a description of the software master definition.

   - Comment

     Optional. The mastering process populates this field with status information about the process. You can also enter any additional information about the software master definition, but ERP 8.0 will overwrite that information when a subsequent process completes.

   - Image Path

     Verify the directory path where you want your software master to reside on your enterprise. If the directory does not exist, ERP 8.0 will create it for you when you run the software mastering process. The directory you indicate will be the root directory for when you create your final software master. See the "Software Master Creation" section in this guide for information about running the software master process.

6. Click the Build Steps tab.
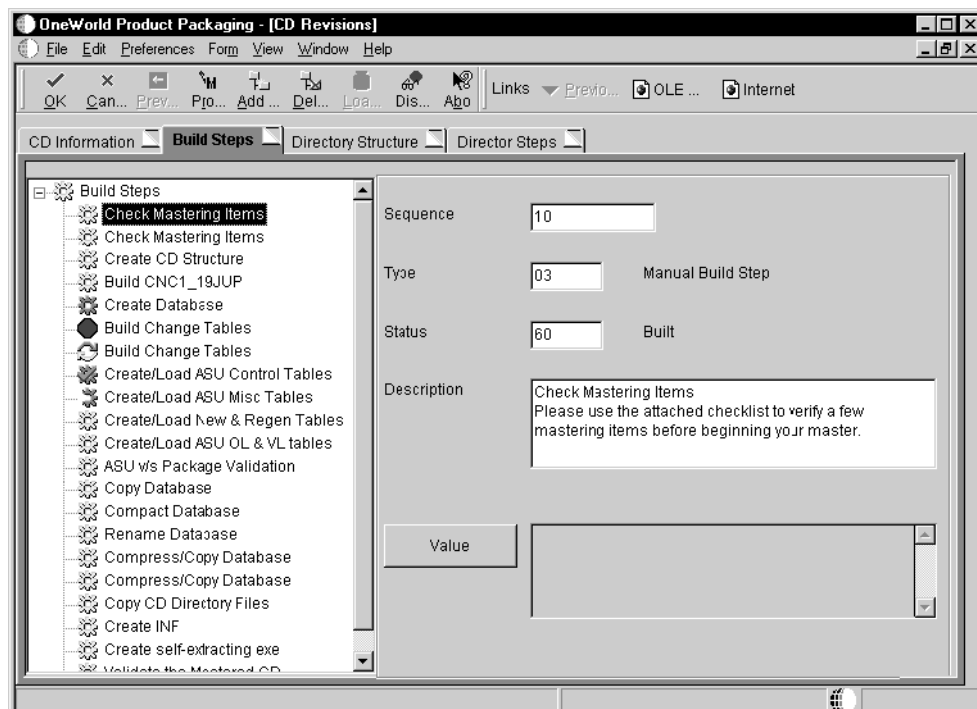
7. To revise a build step, choose the step and complete the following fields:

- Sequence

    Verify the order in which you want the step performed during the creation of the software master definition. You can use the same sequence number for multiple build steps.

- Type

    Verify which component type you want the build step to perform. For example, you can define steps to create file structures, build a package, or create INF files.

- Status

    Verify the current status of the build step, which can indicate whether or not to run the particular step during the mastering process. For example, if there are manual steps that you need to perform during the mastering process, you can manually complete the step, change the step's status to 60 (Built) by choosing the step, and then, from the View menu, choose Execute Step.

    The icons to the left of each build step illustrate the status of that step:

    The status code is 10, In Definition
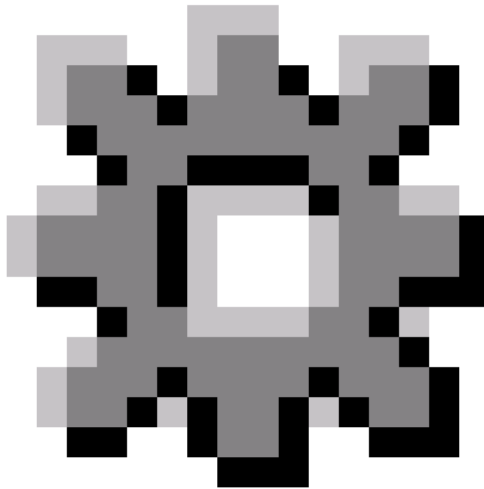
Gray Cog. The status code is 20, Defined.
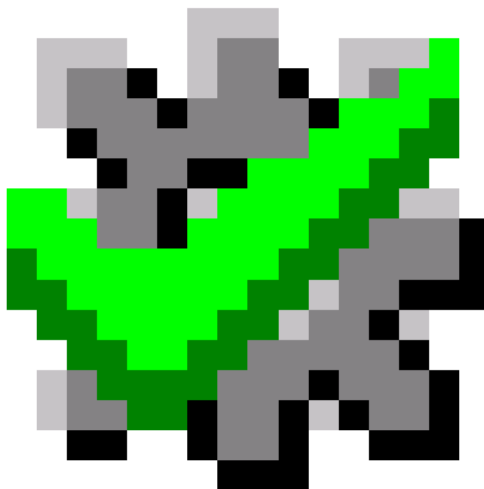
The status code is 30, Validated.
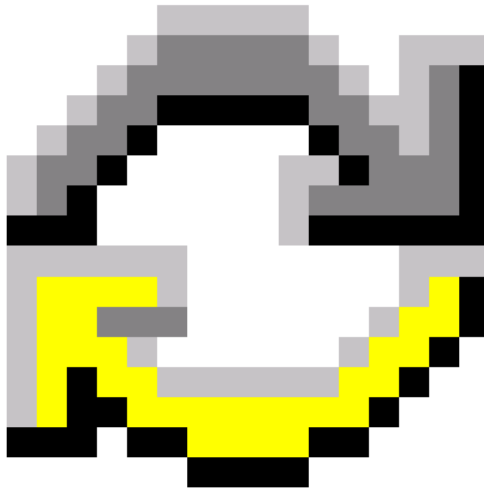
The status code is 40, Processing.
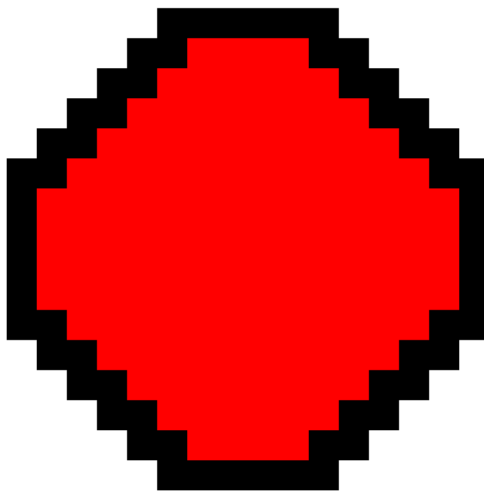
The status code is 50, Failed.
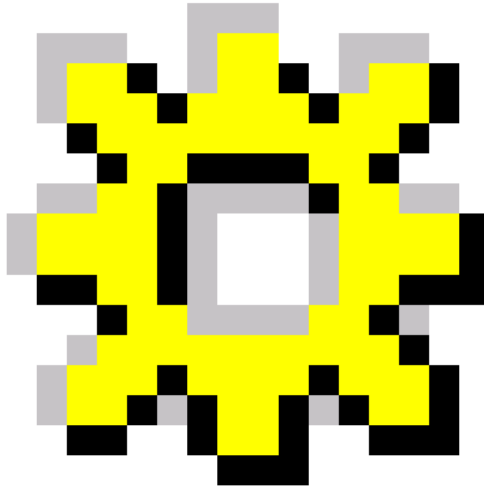
Gold Cog. The status code is 60, Built.

The following fields are dynamic and appear depending upon the build step you chose:

- Description

  Enter a description about the build step. The first line of the description appears as the text for the build step. This line of text appears in the tree view on the left side of the form. You may want to enter a short descriptive name in the first line of the Description field, such as Check Mastering Items, then press the Enter key before typing in a more robust description for the step.

- Target Folder

  ERP 8.0 may populate this field based upon the build step's definition in the software master template. To change this field, click the Target Folder button and use the Select CD Directory form to choose the target folder for this build step.

- Executable

  ERP 8.0 may populate this field based upon the build step's definition in the software master template. To change this field, click the Executable button and use the Select a Windows Executable form to choose an executable for this build step.

- Value/Parameter

  Verify the value or parameter. To change this information, click the Value/Parameter button, then enter a value or parameter appropriate to the step you chose. This field is dynamic. The button name is either Value or Parameter, based upon the step that you chose. The form that appears when you click the button also depends upon which step you chose. For example, the Package Build step calls the Select Package Build form, from which you can choose a

package; and the Build Change Tables step calls the Work With Change Table Definitions form, from which you can modify the change table configuration.

8. To add a step, click Add.

   ERP 8.0 creates a new step labelled Undefined and places it at the end of the steps.

9. Choose the Undefined step and complete the following fields:

   - Sequence

   - Type

   - Status

   - Description

   - Value

10. To run one or more steps, choose the build step you want to run, and from the View menu either choose Execute Step to run just that step or choose Run From Step to run that step plus any steps that follow it.

    This option runs the step and updates its status to 60 (Built). You might use this option for manual build steps. Manual steps are those that you need to perform yourself, such as an additional mastering step that is not part of the Product Packaging Tools. After you complete the manual step, use the Execute Step option to update the step to a status of 60 so that you can proceed to the next step in the process.

11. To add an attachment to a build step, choose the step and from the View menu, click Attachments.

    The Media Objects form appears. See "Media Objects and Imaging" in the *System Administration Guide* for information about attaching media objects.

    After attaching a media object, a paper clip appears in the upper-right corner of the Build Step tab for that build step.

12. To renumber your build steps, from the Form menu, click Renumber.

    ERP 8.0 renumbers your build steps, updating the Sequence field. The renumbering begins with 10 and increments each step by 10 (10, 20, 30, etc.). ERP 8.0 keeps the build steps in the same sequence that you or the software master template established.

13. To delete a step, choose the step, and click Delete.

14. Click the Directory Structure tab.
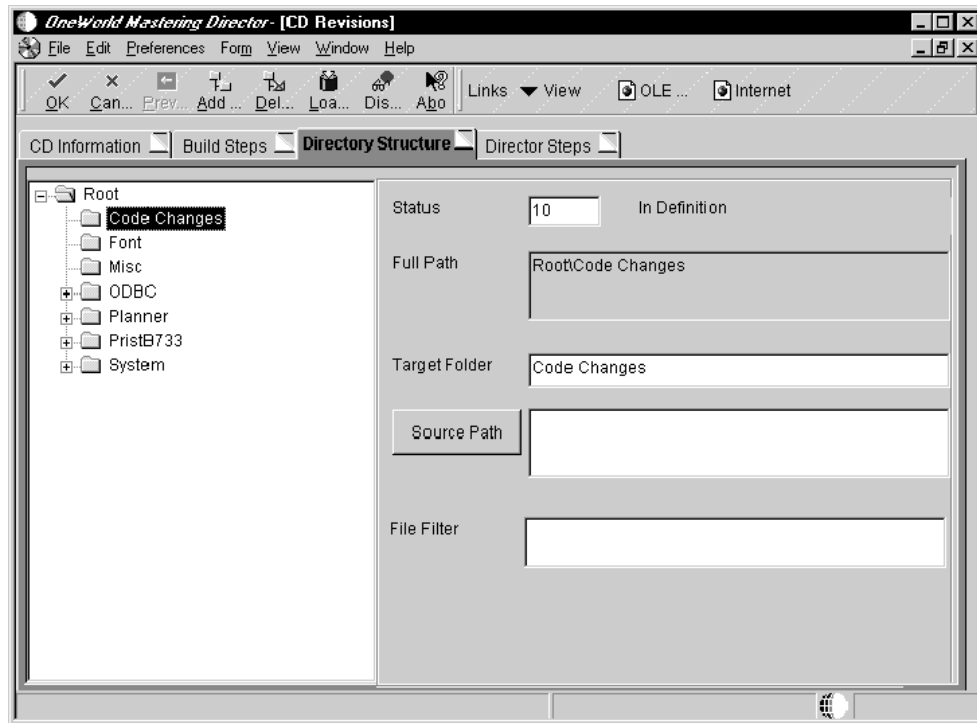
15. To revise a directory, choose the directory and complete the following fields:

    - Status

      Verify the status of the directory.

    - Target Folder

      ERP 8.0 populates this field based upon the directory's definition in the software master template. Do not change the directory name that was defined in the template.

    - Source Path

      Verify the directory path of the source that will populate the component. This is the source path name of the data that you want to retrieve for the master and that you placed into the target folder. You can specify this path using either a relative or absolute path. See "Appendix A" for information about relative and absolute paths.

    - File Filter

      Verify the file filter (*.* is the default). The file filter allows you to filter any data files you retrieve from the source directory. For example, you can use *.* to retrieve all files in the source directory.

16. To add a subdirectory, click on a directory for which you want to add a subdirectory and click Add. You can choose any directory, including Root.

    ERP 8.0 creates a new directory labeled Undefined and places it at the bottom of the structure.

17. Choose the Undefined directory and complete the following fields:

- Status

- Target Folder

  ERP 8.0 populates this field for new directories with Undefined. Change this field to represent the new directory's name.

- Source Path

- File Filter

18. To load a subdirectory from an enterprise network directory, click on the directory that will be the root of the subdirectory that you want to load, which must already exist on your enterprise.

  This feature copies any enterprise directory structure into the software master definition. Complete the following:

19. Click Load.

  The Load Folders From Directory form appears.
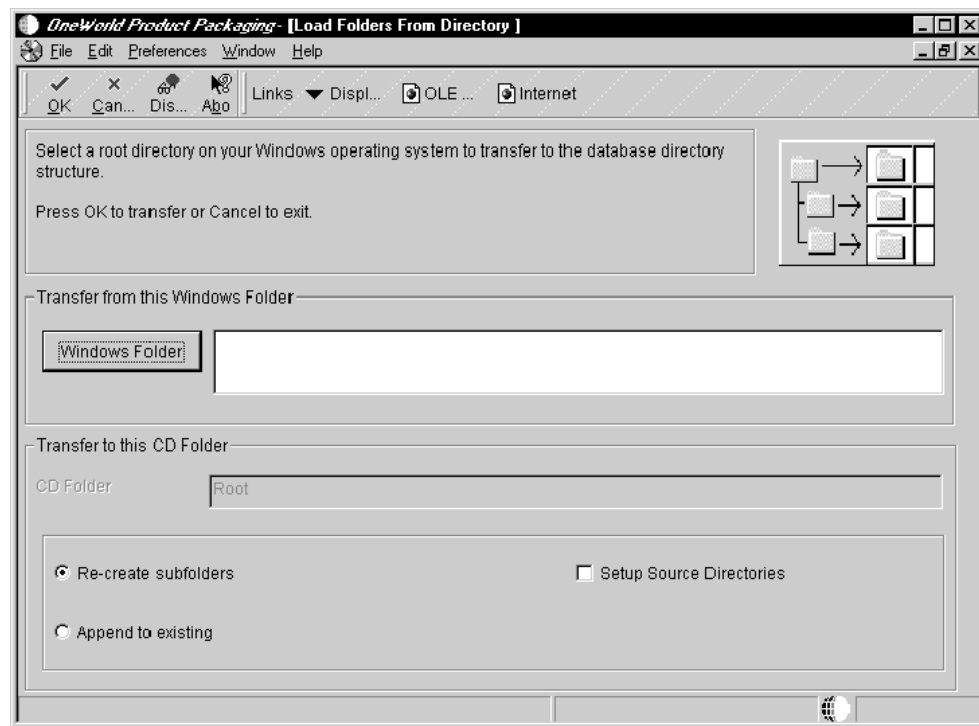
20. Click Windows Folder.

  The Select Directory form appears.
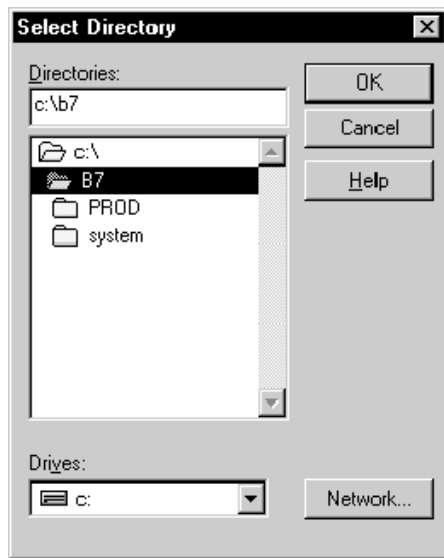
21. Find and choose a directory you want to load into your software master, then click OK.

22. On the Load Folders From Directory form, choose one of the following:

    - Re-create subfolders

      This option replaces (deletes) the existing subdirectories and replaces them with the subdirectories you want to load into the software master.

    - Append to existing

      This option appends to the existing subdirectories the subdirectories you want to load into the software master.

23. If needed, click the Setup Source Directories checkbox. When creating the software master, having this checked will automatically create the structure of the source directories and it will also copy all files within the source directories to the software master.

    If you do not check Setup Source Directories, ERP 8.0 will create the source directory structure within the software master and the directories will be empty.

24. Click OK.

25. To delete a directory, choose the directory, then click Delete.

26. When finished revising the software master definition, click OK.

Copying a Software Master Definition

This task explains how to copy a software master definition that you already created. This allows you to copy the information that you entered into the CD Configuration Director, the build steps, and the directory structure.

► **To copy a software master definition**

From Product Packaging (GH962), choose OneWorld Product Packaging (P9640).

1. On Work With Software Mastering, click Find.

   Existing software master definitions appear.

2. Choose the master you want to copy, then click Copy.

   The Copy CD Configuration form appears.

3. Complete the following fields, then click OK:

   - Name

     Enter a unique name for the software master definition you are copying, such as B7334 Update.

   - Description

     Optional. Enter a description of the software master definition.

   - Release

     Enter the ERP 8.0 release for the copy of the software master definition, such as B7334.

   - Type

     In most cases you will not need to change the default value. If you need to, however, you can change the type of your software master when making a copy. For example, you can change the type from a Setup CD to an ASU CD. This does not change build steps or the directory structure. When you validate your software master, you will receive warning messages that your master does not match the default settings of the ASU CD template, because your master is

actually based upon the Setup CD template. This will not prevent you from creating your software master.

- Build Phase

  Enter which phase of development your software master definition represents, such as an alpha, beta, or general availability phase.

- Image Path

  Enter the directory path where you want your software master to reside on your enterprise. If the directory does not exist, ERP 8.0 will create it for you when you run the software mastering process. The directory you indicate will be the root directory for the software master that you create. See the "Software Master Creation" section in this guide for information about running the software master process.

Proofing a Software Master Definition

This task explains how to proof software master definitions. This creates a report that details each build step in the definition, showing the sequence of the steps and what processes, if any, each step would run when creating the actual master.

Proofing a software master definition does not change any part of a software master's status.

▶ **To proof a software master definition**

From Product Packaging (GH962), choose OneWorld Product Packaging (P9640).

1. On Work With Software Mastering, click Find.

   Existing software master definitions appear.

2. Complete one of the following:

   - To proof one software master definition, choose the definition you want to create, then from the View menu, choose Proof CD.

   - To proof all software master definitions for a specific release, from the View menu, choose Proof Release. A form appears in which you enter the release number of the definitions you want to proof.

   With whichever proof method you chose, the Report Output Destination form appears.

3. Specify whether to send the report to a printer or to view an online version of the report using Acrobat Reader, and click OK.

   A batch process runs a report that shows each build step in sequence and what processes, if any, each step runs when creating the actual master.

Validating a Software Master Definition

This task explains how to run a report that validates the software master definition that you created. This task runs the report in final mode and the report will change the status of those build steps that do not have errors.

► **To validate a software master definition**

From Product Packaging (GH962), choose OneWorld Product Packaging (P9640).

1. On Work With Software Mastering, click Find.

   Existing software master definitions appear.

2. Choose the master you want to validate, then click Validate.

   The Report Output Destination form appears.

3. Specify whether to send the report to a printer or to view an online version of the report using Acrobat Reader, and click OK.

   The report runs. All steps without errors whose status was In Definition or Defined are promoted to the status of Validated. The report lists each build step that will run when you create your master. The report lists whether the build step is validated or not. If it is validated, the build step will work properly when creating the software master. Otherwise, the build step will have either a warning or error message:

   • Warning messages will not stop the creation of a software master. The message specifies what the warning is. If a build step has a warning message, you should verify that the build step is how you want it to be before proceeding.

   • Error messages will stop the creation of a software master. You must fix any build steps that contain error messages. The message specifies the error.

Deleting a Software Master Definition

This task explains how to delete a software master definition. Everything associated with the definition will also be deleted, such as the change table configurations.

► **To delete a software master definition**

From Product Packaging (GH962), choose OneWorld Product Packaging (P9640).

1. On Work With Software Mastering, click Find.

   Existing software master definitions appear.

2. Choose the master you want to delete, then click Delete.

   A message box appears asking if you are sure you want to delete the software master definition.

3. Click OK.

Software Master Templates

This section explains software master templates. It describes each build step that you can use in a template. Build steps are the processes used to create a software master. This section also explains how to add, revise, copy, and delete software master templates.

See Also

❑ *Defining a Software Master* in this guide for information about the ERP 8.0 Mastering Director and how to indicate the template you want to use when creating your software master

Understanding Software Master Templates

This chapter explains the components of the software master templates used by the Product Packaging Tool. Templates provide default information when creating a new software master. For example, to distribute objects to a disconnected enterprise, you would chose to build a master based upon the ASU (Application Software Update) CD template. The ERP 8.0 Mastering Director would use the ASU CD template to determine what director steps, build steps, and directory structure to use when creating the software master. You can, of course, customize the default information provided by the templates.

Details of all Build Step Processes

This topic explains all of the software mastering build step processes that a template can offer. Not all of these processes will appear on every template.

Undefined

Type = 00

Performed Automatically = Not Applicable

This build step is the default process when adding a new build step to a software master or template. Once you add this build step, you need to define it for the master or template.

Create CD File Structure

Type = 01

Performed Automatically = Yes

This build step creates the physical directory structure at the image-path location that you specified when creating the software master definition.

Package Build

Type = 02

Performed Automatically = Yes

This build step builds the assigned package based upon the package assembly and build definitions.

Manual Build Step

Type = 03

Performed Automatically = No, see the specific template definition in this chapter for complete information about this build step's performance.

This build step allows the administrator to instruct the user on how to perform a process that has not yet been automated. You should verify the mastering steps and options of this step before beginning your master.

The software mastering batch process stops when it encounters this build step. Once you complete this build step, change its status to Succeeded (status code of 60), and restart the software mastering batch process.

Pre-Build Package

Type = 04

Performed Automatically = Yes

For J.D. Edwards Internal Use Only.

Pre-Build Pristine

Type = 05

Performed Automatically = Yes

For J.D. Edwards Internal Use Only.

Build Cross-Reference

Type = 06

Performed Automatically = Yes

For J.D. Edwards Internal Use Only.

Build Data Dictionary

Type = 07

Performed Automatically = Yes

For J.D. Edwards Internal Use Only.

Build In-House Package Database

Type = 08

Performed Automatically = Yes

For J.D. Edwards Internal Use Only.

Build Planner Database

Type = 09

Performed Automatically = Yes

For J.D. Edwards Internal Use Only.

Build Pristine Database

Type = 10

Performed Automatically = Partial, see the specific template definition in this chapter for complete information about this build step's performance.

This build step creates the pristine data tables in the final pristine jdeb7.mdb database that corresponds to the given set of modules.

Build Store & Forward Database

Type = 11

Performed Automatically = Yes

For J.D. Edwards Internal Use Only.

Build Standalone Database

Type = 12

Performed Automatically = Yes

For J.D. Edwards Internal Use Only.

Build Change Tables

Type = 13

Performed Automatically = Yes

This build step builds the change tables based upon the change table configuration that was set up as part of the software master definition.

Master Central Objects

Type = 14

Performed Automatically = No

For J.D. Edwards Internal Use Only.

Compress

Type = 15

Performed Automatically = Partial, see the specific template definition in this chapter for complete information about this build step's performance.

This build step compresses the final pristine jdeb7.mdb database into the data.cab file that ERP 8.0 places within the final image path.

Create INF

Type = 16

Performed Automatically = Yes

Please DO NOT modify this file by hand. This build step updates the deployment.inf file that the installation applications use during the update installation.

Copy CD Directory Files

Type = 17

Performed Automatically = Yes

This build step copies the built package to the target image path. This step also copies to the target image path any additional files defined in the software master directory structure.

If you have already built the package and do not want the mastering process to build the package again, set the status of the Package Build step to 60. When you create your software master, the process will skip the package build and when it runs this Copy CD Directory Files step, it will copy the package.

Virus Check

Type = 18

Performed Automatically = Partial

For J.D. Edwards Internal Use Only.

Windows Executable

Type = 19

Performed Automatically = Partial, see the specific template definition in this chapter for complete information about this build step's performance.

This build step allows you to specify a Microsoft Windows executable or batch file as part of the mastering process.

Data Cleanup

Type = 20

Performed Automatically = No

For J.D. Edwards Internal Use Only.

Build Package Database

Type = 21

Performed Automatically = Yes

For J.D. Edwards Internal Use Only.

Batch Process

Type = 22

Performed Automatically = Yes

This build step allows you to define a batch process to run as part of the software master definition.

ASU CD Template

The ASU CD is the main template used with the Product Packaging Tools. This template is the basis for delivering ERP 8.0 objects to distributed enterprises. The following table shows the build steps and their sequence for an ASU CD:

Sequence Number	Build Step (Type)
10	Check Mastering Items (03 - Manual Build Step)
20	Cleanup Temporary Files (22 - Batch Process)
30	Create CD Structure (01 - Create CD File Structure)
40	Build (02 - Package Build)
50	Create Database (22 - Batch Process)
60	Build Change Tables (13 - Build Change Tables)
70	Create/Load ASU Change Tables (22 - Batch Process)
80	Create/Load ASU Control Tables (22 - Batch Process)
90	Create/Load ASU Misc Tables (22 - Batch Process)
100	Create/Load New & Regen Tables (22 - Batch Process)
110	Create/Load ASU OL & VL tables (22 - Batch Process)
120	ASU v/s Package Validation (22 - Batch Process)
130	Copy Database (22 - Batch Process)

140	Compact Database (22 - Batch Process)
150	Rename Database (22 - Batch Process)
160	Compress/Copy Database (22 - Batch Process)
170	Copy Package and Feature INFs (22 - Batch Process)
180	Copy CD Directory Files (17 - Copy CD Directory Files)
190	Create INF (16 - Create INF)
200	Create self-extracting exe (22 - Batch Process)
210	Validate the Mastered CD (22 - Batch Process)

Additional Build Step Information for the ASU CD Template

The following table provides additional information pertaining to a particular build step within the ASU CD template.

Sequence Number	Build Step (Type) with Additional Information
10	Check Mastering Items (03 – Manual Build Step) –Verify the mastering steps and options of the step before beginning your master. Must be executed manually before the Master CD.
20	Cleanup Temporary Files (22 - Batch Process) - this build step launches the R9640L batch process using versions XJDE0001 through XJDE0005. This process deletes the previous software master from the build machine. This step deletes the contents of the $TEMP\master and the $TEMP\data directory, as well as the package and feature infs from the image directory.
30	Create CD File Structure (01 – Create CD Structure) – Creates the CD file structure on the Image path
40	Build (02 – Package Build) – Builds the defined update package. Can be set to Built status if the package has run through the Package Build application.
50	Create Database (22 - Batch Process) - this build step launches the R9640F batch process using version ZJDE0002 and the R9640K batch process using version XJDE0001. This process either creates an empty Microsoft Access database, if the database does not exist. or it clears the tables from the

existing database. This process uses the following directory location and database name: $TEMP/master/jdeb7.mdb

60	Build Change Tables (13 – Build Change Tables) - This builds the change tables based on the configuration that was setup during the director phase.
70	Create/Load ASU Change Tables (22 - Batch Process) - this build step launches the R9670 batch process using version XJDE0003. This process creates change tables in the database ($TEMP/master/jdeb7.mdb), populating the tables from the Change Table data source.
80	Create/Load ASU Control Tables (22 - Batch Process) - this build step launches the R9670 batch process using version XJDE0001. This process creates control tables in the database ($TEMP/master/jdeb7.mdb), populating the tables from the Control Table data source.
90	Create/Load ASU Misc Tables (22 - Batch Process) - this build step launches the R9670 batch process using version XJDE0002. This process creates miscellaneous tables in the database ($TEMP/master/jdeb7.mdb), populating the tables based upon the selections you made for the objects in your ASU package, your change tables, and the software master definition.
100	Create/Load New & Regen Tables (22 - Batch Process) - this build step launches the R96700 batch process using version XJDE0001. This process creates tables in the database ($TEMP/master/jdeb7.mdb) that are marked as new or regenerate in the table change table or the table conversion scheduler.
110	Create/Load ASU OL & VL tables (22 - Batch Process) - this build step launches the R9600400C batch process using version XJDE0001. This process copies to the jdeb7.mdb database the Object Librarian, Versions List, package assembly information for your master. Verify that the data source, which you can set in the processing options of this version, is set correctly.
120	ASU v/s Package Validation (22 - Batch Process) - this build step launches the R9671 batch process using version XJDE0001. This process cross validates, ensuring that objects, tables, and specifications in the ASU package definition match with the object change table, table change table, index change table, and table conversion scheduler in the software master.
130	Copy Database (22 - Batch Process) - this build step launches the R9640E batch process using version XJDE0002. This process copies the ASU database from $TEMP/master/jdeb7.mdb to $TEMP/data/jdeb7.mdb.

140	Compact Database (22 - Batch Process) - this build step launches the R9640G batch process using version ZJDE0001. This process uses Microsoft Access to compact the ASU database.
150	Rename Database (22 - Batch Process) - this build step launches the R9640H batch process using version XJDE0001. This process renames the jdeb7.mdb database to *packagename*.mdb, where *packagename* is the name of the package associated with the database.
160	Compress/Copy Database (22 - Batch Process) - this build step launches R9640E using version XJDE0003. This process compresses the ASU database (*packagename*.mdb) and copies it from the $TEMP/data directory to the final software master image path as Data.cab.
170	Copy Package and Feature INFs (22 - Batch Process) - this build step launches the R9600400E batch process using version XJDE0001 and the R9640E batch process using versions XJDE0032 through XJDE0034. This process copies deployment features INFs, the package INFs, and the feature INFs from the deployment server to $TEMP directories. The INFs are then compressed in $TEMP then copied to the final software master image path.
180	Copy CD Directory Files (17 – Copy CD Directory Files) - this build step copies additionally specified items into the Image path. (For example, all install programs are copied to the root of the Image Path.)
190	Create INF (16 – Create INF) - this build step creates the deployment INF file into the image path directory.
200	Create self-extracting exe (22 - Batch Process) - this build step launches the R9640J batch process using version XJDE0001. This process takes the entire software master image and creates a CAB file and a self-extracting executable file in the $TEMP/final directory. You can use either of these files to deliver the software master. Uncompress the CAB file or run the executable file on the deployment server, then use the Application Software Update Guide to update ERP 8.0 with the software master.
210	Validate the Mastered CD (22 - Batch Process) - this UBE performs post-mastering validation on the master that has been created. Refer to the report output for datails.

Custom CD

The Custom CD is for general use. This CD type has no template. It is primarily used by a ERP 8.0 administrator to create backups of source code, documents, and so forth, while still using the Product Packaging Tools. This CD type allows you to enter a directory structure that contains all of the files that you want loaded onto a custom CD image. Once completed, the administrator can move that image to a CD burner to create the actual CD.

Working with Software Master Templates

This chapter explains how to add, revise, copy, proof, and delete software master templates. Once you add a template, you can use the ERP 8.0 Mastering Director to create a software master definition using that template. See "Defining a Software Master" in this guide for information.

Adding a Software Master Template

This task explains how to add a software master template. If you have already set up the template and need to revise it, see "Revising a Software Master Template" in this chapter.

► To add a software master template

From Advanced Operations (GH9622), choose OneWorld Mastering Templates (P9640).

1. On Work With CD Templates, click Add.

   The Template Director form appears.

2. Click Next.

   The Template Information form appears.

3. Complete the following fields:

   - Name

     Read-only. ERP 8.0 populates this field with the information you enter into the following fields. For example, if you enter release B7334 with an 11 type and a 02 build phase, the name of the template will be B7334-11-02. ERP 8.0 will not allow you to add a template with the same name as an already existing template.

   - Release

     Enter the ERP 8.0 release for the software master template, such as B7334.

   - Type

     Enter which type of CD that you want the template to define, such as an ASU CD.

   - Build Phase

     Enter which phase of development your software master template represents, such as an alpha, beta, or general availability phase.

   - Description

Optional. Enter a description of the software master template.

4. Click Next.

    The CD Revisions form appears.

5. Set up the build steps and directory structure for the template; see the "Revising a Software Mater Template" topic for an explanation.

Revising a Software Master Template

This task explains how to revise a software master template. If you need to add a new template, see "Adding a Software Master Template" in this chapter.

► **To revise a software master template**

From Advanced Operations (GH9622), choose OneWorld Mastering Templates (P9640).

1. On Work With CD Templates, click Find.

    Existing templates appear.

2. Choose the template you want to revise, then click Select.

    The CD Revisions form appears.

3. To refresh the information shown on any tabs on the CD Revisions form from the View menu, choose Refresh.

4. To validate, in proof mode only, the information shown on any tabs, click Validate. This runs a report that validates the definition.

5. Click the CD Information tab and, if needed, revise the following fields:

    - Status

      Enter the status of the template, which should be "10 In Definition."

    - Description

      Optional. Enter a description of the software master template.

    - Comment

      Optional. The mastering process populates this field with status information about the process. You can also enter any additional information about the software master template, but ERP 8.0 will overwrite that information when a subsequent process completes as you define and create your software master.

6. Click the Build Steps tab. If needed, choose a step and revise the following fields:

    - Sequence

      Enter the order in which you want the step performed during the creation of the software master definition. You can use the same sequence number for multiple build steps.

    - Type

      Enter which component type you want the build step to perform. For example, you can define steps to create file structures, build a package, or create INF files.

- Status

  Enter the starting status of the build step, which should be "10 In Definition." The Product Packaging process changes this field during the subsequent stages of defining and creating a software master.

  The following fields are dynamic and appear depending upon the build step you chose:

- Description

  Enter a description about the build step. The first line of the description appears as the text for the build step. This line of text appears in the tree view on the left side of the form. You may want to enter a short descriptive name in the first line of the Description field, such as Check Mastering Items, then press the Enter key before typing in a more robust description for the step.

- Target Folder

  Click the Target Folder button. Use the Select CD Directory form to choose the target folder for the build step you chose.

- Executable

  Click the Executable button. Use the Select a Windows Executable form to choose an executable for this build step.

- Value/Parameter

  Click the Value/Parameter button, then enter a value or parameter appropriate to the step you chose. This field is dynamic. The button name is either Value or Parameter, based upon the build step. The form that appears when you click the button also depends upon which step you chose. For example, the Package Build step calls the Select Package Build form from which you can choose a package, and the Build Change Tables step calls the Work With Change Table Definitions form from which you can modify the change table configuration.

7. If you need to add a step, click Add.

   ERP 8.0 creates a new step labelled Undefined and places it at the bottom of the steps.

8. Choose the Undefined step and complete the following fields:

   - Sequence
   - Type
   - Status
   - Description
   - Value

9. To add an attachment to a build step, choose the step and from the View menu, click Attachments.

   The Media Objects form appears. See "Media Objects and Imaging" in the *System Administration Guide* for information about attaching media objects.

   After attaching a media object, a paper clip appears in the upper-right corner of the Build Step tab for that build step.

10. To renumber your build steps, from the Form menu, click Renumber.

    ERP 8.0 renumbers your build steps, which updates the Sequence field. The renumbering begins with 10 and increments each step by 10 (10, 20, 30, etc.). ERP 8.0 keeps the build steps in the same sequence that you established.

11. To delete a step, choose the step, and then click Delete.

12. Click the Directory Structure tab and, if needed, revise each directory by choosing a directory and verifying the following fields:

    - Status

      Enter the status of the directory, which should be `10 In Definition`.

    - Target Folder

      Enter the Target Folder path for the directory you chose.

    - Source Path

      Enter the directory path of the source that will populate the component. This is the source of the data that you want to retrieve for the master and placed into the target folder (directory). You can specify this path using either a relative or absolute path. See "Appendix A" for information about relative and absolute paths.

    - File Filter

      Enter the file filter (*.* is the default) to filter data files that you retrieve from the source directory. For example, you can use *.* to retrieve all files in the source directory.

13. To add a subdirectory, click on a directory for which you want to add a subdirectory, and then click Add. You can choose any directory, including Root.

    ERP 8.0 creates a new directory labelled Undefined and places it beneath the directory that you chose.

14. Choose the Undefined directory and complete the following fields:

    - Status
    - Target Folder
    - Source Path
    - File Filter

15. To load a subdirectory from an enterprise network directory, click on the directory that will be the root of the subdirectory that you want to load. This directory must already exist on your enterprise.

16. Click Load.

    The Load Folders From Directory form appears.

17. Click Windows Folder.

    The Select Directory form appears.

18. Find and choose a directory you want to load into your template, then click OK.

19. On the Load Folders From Directory form, choose one of the following:

- Re-create subfolders

    This option replaces (deletes) the existing subdirectories and replaces them with the subdirectories you want to load into the template.

- Append to existing

    This option appends to the existing subdirectories the subdirectories you want to load into the software template.

20. If needed, click the Setup Source Directories checkbox. When creating the software master, having this checked will automatically create the structure of the source directories and will copy all files within the source directories to the software master.

    If you do not check Setup Source Directories, ERP 8.0 will create the source directory structure within the software master and the directories will be empty.

21. Click OK.

22. When finished revising the template, click OK.

Copying a Software Master Template

This task explains how to copy a software master template. This allows you to copy the information from the template, which includes the build steps and directory structure.

If you need to add a new software master template, and cannot copy and revise one that already exists, see "Adding a Software Master Template" in this section.

► **To copy a software master template**

From Advanced Operations (GH9622), choose OneWorld Mastering Templates (P9640).

1. On Work With CD Templates, click Find.

    Existing templates appear.

2. Choose the template you want to copy, then click Copy.

    The Copy CD Configuration form appears.

3. Complete the following Copy To fields, then click OK:

- Description

  Optional. Enter a description of the software master definition.

- Release

  Enter the ERP 8.0 release for the template, such as B7334.

- Type

  Enter which type of template you want to use when setting up your software master, such as the ASU CD template.

- Build Phase

  Enter which phase of development your template represents, such as an alpha, beta, or general availability phase.

Proofing a Software Master Template

This task explains how to proof software master templates. This creates a report that details each build step in the definition, showing the sequence of the steps and what processes, if any, each step would run when creating the actual master.

Proofing a software master template does not change a build step's status.

► **To proof a software master template**

From Advanced Operations (GH9622), choose OneWorld Mastering Templates (P9640).

1. On Work With CD Templates, click Find.

    Existing templates appear.

2. Complete one of the following:

    - To proof one software master template, choose the template you want to create, and then from the View menu, choose Proof CD.

    - To proof all software masters templates for a specific release, from the View menu choose Proof Release. A form appears in which you enter the release number of the templates you want to proof.

    The Report Output Destination form appears.

3. Specify whether to send the report to a printer or to view an online version of the report using Acrobat Reader, and click OK.

    A batch process runs a report that shows each build step in sequence and what processes, if any, each step would run when creating the actual master.

Deleting a Software Master Template

This task explains how to delete a software master template.

► **To delete a software master template**

From Advanced Operations (GH9622), choose OneWorld Mastering Templates (P9640).

1. On Work With CD Templates, click Find.

    Existing templates appear.

2. Choose the template you want to delete, then click Delete.

    A message box appears asking if you are sure you want to delete the software master template.

3. Click OK.

Change Table Configuration

This section explains how to work with a change table configuration after you have created one. Once you have completed the configuration of a change table you can revise, copy, or delete it.

See Also

❑ *Configuring Change Tables* in this guide for information on how to create a change table configuration

Revising or Submitting Change Tables

This task explains how to build and submit change table configurations to a software master after you have already created the software master and need to revise or add change tables. You can ignore this task if you have not yet created your software master. If the template you chose for your software master required change tables, the software master will build the change tables you specified during the setup of your software master definition.

► To revise or submit change tables

From Product Packaging (GH962), choose Change Table Configurations (P9642).

1. On Work With Change Table Definitions, complete the following field, and then click Find:

   - CD Name

     Enter the name of the software master for which you want to view change table configurations.

Existing change table configurations appear with the following:

- A check mark appears to the left of each table configuration row that either completed its build successfully or is ready to be built.

- A circle with a line through it appears to the left of any table configuration that failed its build or is not at a valid status for the configuration to be submitted.

2. If you need to rerun a particular change table batch process and the change table row does not have a checkmark to the left of it, correct any issue that may exist, choose the change table row, and click Select.

   The Change Table Revisions form appears.

3. Complete the following field, then click OK:

- Configuration Status

  Change to or verify that the status is 30 (Validated), which allows this change table to be built and submitted to the software master.

4. To submit change tables, complete one of the following:

- To submit an individual change table row, choose the row and from the Row menu, choose Submit.

- To submit multiple change table rows, choose the rows using the Control or Shift keys with your mouse, and from the Row menu, choose Submit.

- To submit all of the change table rows, from the Form menu, choose Submit.

  ERP 8.0 builds the change tables you chose and includes them with the software master. If you revised existing change tables, they will replace themselves in the

software master. If you added change tables, they will be appended to the software master.

Copying a Change Table Configuration

This task explains how to copy change table configurations from one master definition to another master definition. This process copies all change table configurations associated with the master you are copying from.

► **To copy a change table configuration**

From Product Packaging (GH962), choose Change Table Configurations (P9642).

1. On Work With Change Table Definitions, complete the following field.

    *   CD Name

        Enter the name of the software master from which you want to copy its change table configurations.

2. Click Find:

    Existing change table configurations appear.

3. Choose a change table row and click Copy.

    The Copy Change Table Definitions form appears.

4. Complete the following field, and then click OK:

    *   CD Name

Enter the name of the software master definition to which you want to copy the change table configurations. The master you are copying to must already exist.

Deleting a Change Table Configuration

This task explains how to delete change table configurations you have added to your software master definition.

▶ **To delete a change table configuration**

From Product Packaging (GH962), choose Change Table Configurations (P9642).

The Work With Change Table Definitions form appears.

1. Complete the following field, and then click Find:

   - CD Name

   Existing change table configurations appear.

2. Choose a change table row and click Delete.

Data Cleanup

This section explains how to use the data cleanup application to create procedures and templates to clean up your software master data. The data cleanup application can delete obsolete data, standardize existing data, and provide integrity, summary, and error reports about the data. You can clean up the following:

- Data dictionary tables and specifications

- Auto pilot tables

- User defined codes and types

- Menu tables

- Object librarian tables

- Central object tables

Working with Data Cleanup Procedures

This chapter explains how to work with data-cleanup procedures for your software master. This function of the Product Packaging Tools includes an application to add, revise, copy, and delete a set of data cleanup steps. You define how you want these steps to clean up your software master data.

Adding a Data Cleanup Procedure

This task explains how to add a data cleanup procedure. This allows you to add procedure information and the steps necessary to clean up data.

Note:

Even though this Product Packaging Tools function is primarily for creating data cleanup procedures, you can use it to create any type of procedure to run a batch process or Microsoft Windows executable.

► **To add a data cleanup procedure**

From Product Packaging (GH962), choose Data Cleanup Procedure Application (P9646).
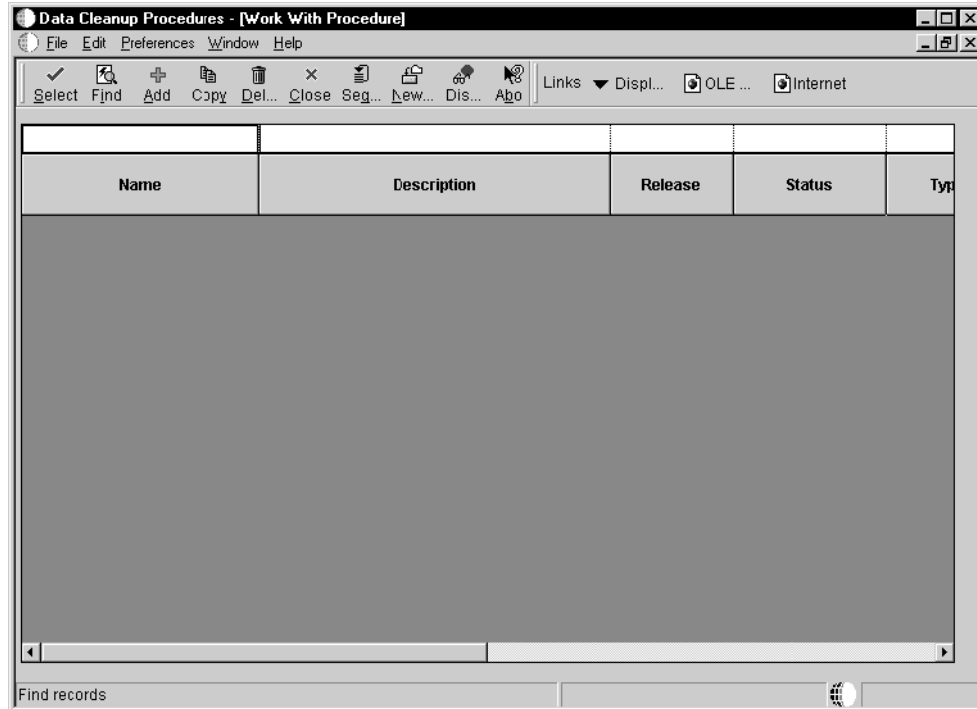
1. On Work With Procedure, click Add.

    The Procedure Definition Director form appears.
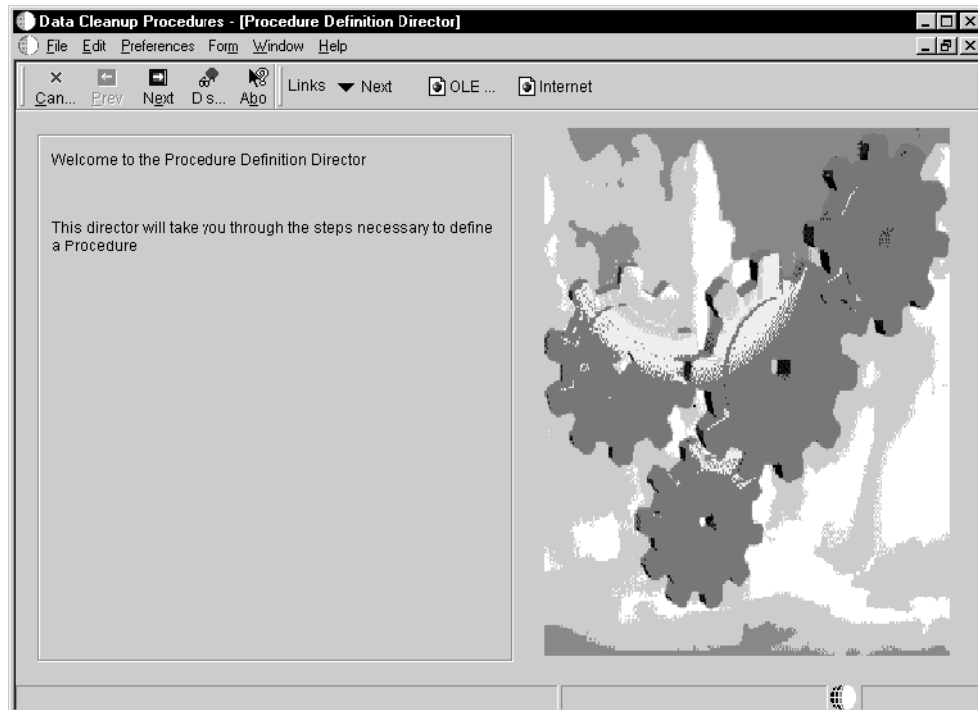
2. Click Next.

   The Add Procedure form appears.

3. Complete the following fields:

- Name

  Enter a unique name for the data cleanup procedure you are adding, such as Object Librarian Cleanup.

- Description

  Optional. Enter a description of the data cleanup procedure.

- Comment

  Optional. Enter a comment about the data cleanup procedure.

- Status

  Verify the status of the data cleanup procedure. Set the status to 30 (Validated) before you execute the procedure.

- Procedure Release

  Enter the ERP 8.0 release that pertains to the data cleanup procedure, such as B7334. This is the release currently installed on the client workstation you are using.

- Template Name

  Optional. Enter the name of the data cleanup template that you want to work from for the procedure you are adding.

4. Click Next.

   The Procedure Revision form appears.

5. To refresh the information shown on either the Information tab or the Steps tab of the Procedure Revision form, from the View menu, choose Refresh.

6. Click the Information tab, and complete the following fields:

    - Description

    - Status

    - Comment

    - Release

7. Click the Steps tab.

8. To add a step, click Add.

    ERP 8.0 creates a new step labelled Undefined and places it at the end of the highlighted procedure displayed in the tree. If you add a step to a subprocedure, the Undefined step appears at the end of that subprocedure. A form appears asking you to verify your add to the subprocedure; the add changes that procedure, whether it is a subprocedure or not, wherever it appears.

9. Choose the Undefined step and complete the following fields:

    - Status

    Enter the status of the data cleanup build step. Set the status to 30 (Validated) before you execute the step.

    - Type

    Enter which type of build step you want to add. For example, you can add steps that are batch processes, a Microsoft Windows executable program, or another data cleanup procedure.

- Sequence

  ERP 8.0 automatically displays a sequence number based upon where you add the build step. You can change this sequence number to move the build step up or down in the procedure. You can use the same sequence number for multiple build steps.

- Description

  Optional. Enter a description of the data cleanup build step.

- Comment

  Optional. Enter a comment about the data cleanup build step.

10. Complete the following fields, which appear if you are adding a batch process:

    - Object Name

      Enter a ERP 8.0 name of a batch process. For example, enter R9647R to have the step execute the Object Librarian - Object Relationship Cleanup report.

    - Version

      Enter the name of the report version for the batch process you entered. For example, XJDE0002, the Final Mode version.

11. Complete the following fields, which appear if you are adding a Microsoft Windows executable program:

    - Executable

      Enter the name of a Microsoft Windows-compatible executable program. For example, the `xcopy.exe` program.

    - Parameters

      Enter the parameters for the executable program. You can enter command-line switches, directories, and files. For example, for the `xcopy.exe` program, you could enter a copy-from parameter of `c:\temp\*.*`, and you can enter a command-line switch of `\s`.

12. Complete the following field, which appears if you are adding a data cleanup procedure:

    - Procedure Name

      Enter the name of an existing data cleanup procedure. The data cleanup procedure that you enter must already exist. If the procedure appears on the visual-assist form, then it exists.

13. When you tab out of the last field or click on a step in the tree structure on the left side of the form, the data cleanup application saves your step.

14. When finished adding steps, click OK.

Revising a Data Cleanup Procedure

This task explains how to revise a data cleanup procedure that you already created. This allows you to revise the information and steps you created within the procedure. Be aware that if you revise a data cleanup procedure, those revisions are reflected wherever that procedure is used, such as when the revised procedure is nested within another procedure.

If you need to add a new data cleanup procedure, see "Adding a Data Cleanup Procedure" in this chapter.

► **To revise a data cleanup procedure**

From Product Packaging (GH962), choose Data Cleanup Procedure Application (P9646).

1. On Work With Procedure, click Find.

   Existing data cleanup procedures appear.

2. Choose the procedure you want to revise, then click Select.

   The Procedure Revision form appears.

3. To refresh the information shown on either the Information tab or the Steps tab of the Procedure Revision form, from the View menu, choose Refresh.

4. Click the Information tab, and revise the following fields:

   - Description

     Optional. Enter a description of the data cleanup procedure.

   - Status

     Verify the status of the data cleanup procedure. Set the status to 30 (validated) before you execute the procedure.

   - Comment

     Optional. Enter a comment about the data cleanup procedure.

   - Release

     Verify the ERP 8.0 release that pertains to the data cleanup procedure, such as B7334. This is the release currently installed on the client workstation you are using.

5. Click the Steps tab.

6. To revise a build step, choose the step, and complete the following fields:

   - Status

     Verify the status of the data cleanup build step. Set the status to 30 (Validated) before you execute the step.

   - Type

     Verify which component type you want the build step to perform. For example, you can define steps as a batch process, a Microsoft Windows executable, or another data cleanup procedure.

   - Sequence

     Verify the order in which you want the step performed during the execution of the procedure. You can use the same sequence number for multiple build steps.

   - Description

     Optional. Enter a description of the data cleanup build step.

- Comment

  Optional. Enter a comment about the data cleanup build step.

The following fields appear if you are revising a batch process:

- Object Name

  Verify the ERP 8.0 name of the batch process.

- Version

  Verify the name of the report version for the batch process.

The following fields appear if you are revising a Microsoft Windows executable program:

- Executable

  Verify the Microsoft Windows executable program.

- Parameters

  Verify the parameters of the executable.

The following field appears if you are revising a data cleanup procedure:

- Procedure Name

  Verify the name of the data cleanup procedure.

7. To renumber your build steps, from the View menu, click Renumber.

   ERP 8.0 renumbers your build steps, updating the Sequence field. The renumbering begins with 10 and increments each step by 10 (10, 20, 30, etc.). ERP 8.0 keeps the build steps in the same sequence that you or the data cleanup template established.

8. To delete a step, choose the step, and click Delete.

9. When finished revising the data cleanup procedure, click OK.

Copying a Data Cleanup Procedure

This task explains how to copy a data cleanup procedure that you already created.

► **To copy a data cleanup procedure**

From Product Packaging (GH962), choose Data Cleanup Procedure Application (P9646).

1. On Work With Procedure, click Find.

   Existing data cleanup procedures appear.

2. Choose the procedure you want to copy, then click Copy.

   The Copy Procedure form appears.
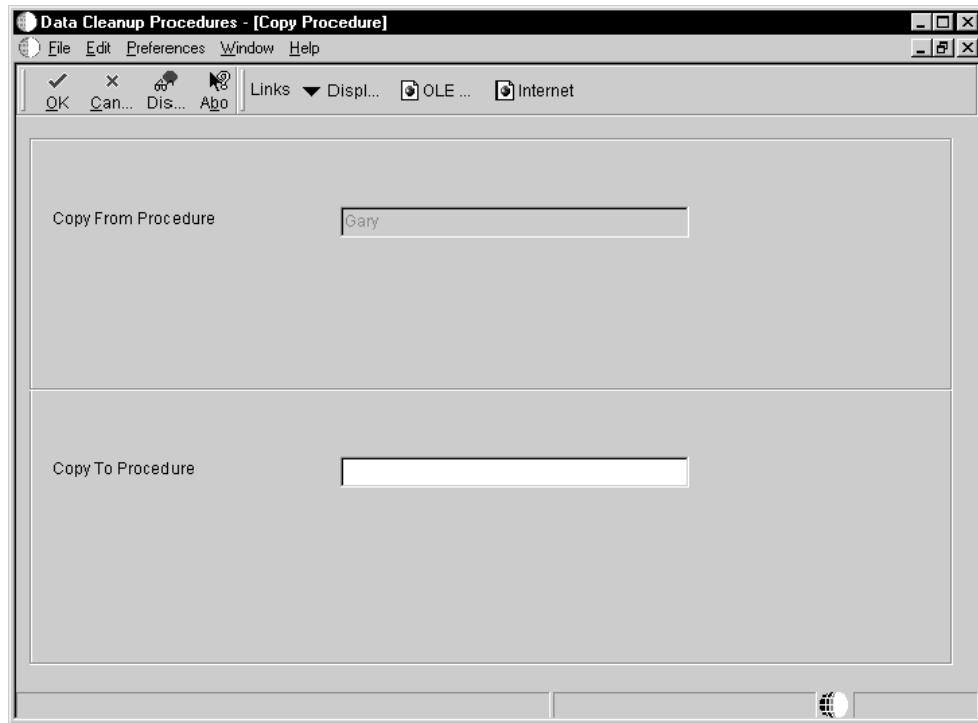
3. Complete the following fields, and then click OK:

- Copy From Procedure

  Enter the name of an existing data cleanup procedure.

- Copy To Procedure

  Enter the name that you want to call the new data cleanup procedure.

Executing a Data Cleanup Procedure and Build Step

This task explains how to execute a data cleanup procedure and build step from the data cleanup application.

Note:

While this task explains how to execute procedures from the data cleanup application, you can also use the software-master build steps to define a step that executes your data cleanup. See "Creating a Software Master" in this guide for information about adding build steps to the software master definition.

▶ **To execute a data cleanup procedure and build step**

From Product Packaging (GH962), choose Data Cleanup Procedure Application (P9646).

1. On Work With Procedure, click Find.

    Existing data cleanup procedures appear.

2. To execute the entire procedure, complete one of the following:

    - On the Work With Procedures form, choose the procedure and from the Row menu, choose Execute.

    - On the Procedure Revision form, choose the main data cleanup procedure and from the View menu, choose Execute Step.

    - On the Procedure Revisions form and from the Form menu, choose Run Main Procedure.

    These options execute the entire procedure. If it executes successfully, ERP 8.0 updates the procedure and the build steps' statuses to 60 (Built).

3. To execute individual build steps, on the Work With Procedures form, choose a procedure, and then click Select.

    The Procedure Revision form appears.

4. Click on the Steps tab.

5. Choose the build step you want to execute and from the View menu, choose Execute Step to process only that step.

    This option executes the step. If the step executes successfully, ERP 8.0 updates the step status to 60 (Built). If you execute a data cleanup procedure step, all of its subordinate steps also execute, including any subprocedures.

Deleting a Data Cleanup Procedure

This task explains how to delete a data cleanup procedure. The application deletes everything associated with the procedure, including deleting where it existed as a subprocedure under other data cleanup procedures.

▶ **To delete a data cleanup procedure**

From Product Packaging (GH962), choose Data Cleanup Procedure Application (P9646).

1. On Work With Procedure, click Find.

    Existing data cleanup procedures appear.

2. Choose the procedure you want to delete, then click Delete.

    A message box appears to verify that you want to delete the procedure.

3. Click OK.

Working with Data Cleanup Templates

This chapter explains how to work with data cleanup templates. Templates are optional for data cleanup. You can use them as a guide to building your own data cleanup procedures. You can add, revise, copy, and delete templates just as you would procedures.

See Also

❑ *Working with Data Cleanup Procedures* for information about procedures.

Adding a Data Cleanup Template

This task explains how to add a data cleanup template. This allows you to add template information and the steps you want for cleaning up data.

► **To add a data cleanup template**

From Advanced Operations (GH9622), choose Data Cleanup Procedure Templates (P9646).

1. On Work With Templates, click Add.

   The Template Definition Director form appears.

2. Click Next.

   The Add Template form appears.

3. Complete the following fields:

   • Name

   Enter a unique name for the data cleanup template you are adding, such as Object Librarian Cleanup.

   • Description

   Optional. Enter a description of the data cleanup template.

   • Comment

   Optional. Enter a comment about the data cleanup template.

   • Status

   Enter a status of 10 (In Definition).

   • Template Release

   Enter the ERP 8.0 release that pertains to the data cleanup template, such as B7334. This is the release currently installed on the client workstation you are using.

   • Template Name

   Enter the name of another data cleanup template that you want to work from for the template you are adding.

4. Click Next.

The Template Revision form appears.

5. To refresh the information shown on either tab on the Template Revision form, from the View menu, choose Refresh.

6. Click the Information tab, and complete the following fields:

- Description

- Status

- Comment

- Release

7. Click the Steps tab.

8. To add a step, click Add.

ERP 8.0 creates a new step labelled Undefined and places it at the end of the highlighted procedure displayed in the tree. If you add a step to a subprocedure, the Undefined step appears at the end of that subprocedure. A form appears asking you to verify your add to the subprocedure; the add changes that procedure, whether it is a subprocedure or not, wherever it appears.

9. Choose the Undefined step and complete the following fields:

- Status

Enter the status of the data cleanup build step. Set the status to 10 (In Definition).

- Type

Enter which type of build step you want to add. For example, you can add steps that are batch processes, a Microsoft Windows executable program, or another data cleanup procedure or template.

- Sequence

ERP 8.0 automatically displays a sequence number based upon where you add the build step. You can change this sequence number to move the build step up or down in the template. You can use the same sequence number for multiple build steps.

- Description

Optional. Enter a description of the data cleanup build step.

- Comment

Optional. Enter a comment about the data cleanup build step.

10. Complete the following fields, which appear if you are adding a batch process:

- Object Name

Enter a ERP 8.0 name of a batch process. For example, enter R9647R to have the step execute the Object Librarian - Object Relationship Cleanup report.

- Version

Enter the name of the report version for the batch process you entered. For example, XJDE0002, the Final Mode version.

11. Complete the following fields, which appear if you are adding a Microsoft Windows executable program:

- Executable

  Enter the name of a Microsoft Windows-compatible executable program. For example, the `xcopy.exe` program.

- Parameters

  Enter the parameters for the executable program. You can enter command-line switches, directories, and files. For example, for the `xcopy.exe` program, you could enter a copy-from parameter of `c:\temp\*.*`, and you can enter a command-line switch of `\s`.

12. Complete the following field, which appears if you are adding a data cleanup procedure:

- Procedure Name

  Enter the name of an existing data cleanup procedure. The data cleanup procedure that you enter must already exist. If the procedure appears on the visual-assist form, then it exists.

13. When you tab out of the last field or click on a step in the tree structure on the left side of the form, the data cleanup application saves your step.

14. When finished adding steps, click OK.

Revising a Data Cleanup Template

This task explains how to revise a data cleanup template that you already created. This allows you to revise the information and steps you created within the template.

If you need to add a new data cleanup template, see "Adding a Data Cleanup Template" in this chapter.

▶ **To revise a data cleanup template**

From Advanced Operations (GH9622), choose Data Cleanup Procedure Templates (P9646).

1. On Work With Templates, click Find.

   Existing data cleanup templates appear.

2. Choose the template you want to revise, then click Select.

   The Template Revisions form appears.

3. To refresh the information shown on either tab on the Template Revisions form, from the View menu, choose Refresh.

4. Click the Information tab, and revise the following fields:

- Description

  Optional. Enter a description of the data cleanup template.

- Status

Verify the status of the data cleanup template. Set the status to 10 (In Definition) before you execute the template.

- Comment

  Optional. Enter a comment about the data cleanup template.

- Release

  Verify the ERP 8.0 release that pertains to the data cleanup template, such as B7334. This is the release currently installed on the client workstation you are using.

5. Click the Steps tab.

6. To revise a build step, choose the step, and complete the following fields:

- Status

  Verify the status of the data cleanup build step. Set the status to 30 (validate) before you execute the step.

- Type

  Verify which component type you want the build step to perform. For example, you can define steps as a batch process, a Microsoft Windows executable, or another data cleanup template.

- Sequence

  Verify the order in which you want the step performed during the execution of the procedure. You can use the same sequence number for multiple build steps.

- Description

  Optional. Enter a description of the data cleanup build step.

- Comment

  Optional. Enter a comment about the data cleanup build step.

The following fields appear if you are revising a batch process:

- Object Name

  Verify the ERP 8.0 name of the batch process.

- Version

  Verify the name of the report version for the batch process.

The following fields appear if you are revising a Microsoft Windows executable program:

- Executable

  Verify the Microsoft Windows executable program.

- Parameters

  Verify the parameters of the executable.

The following field appears if you are revising a data cleanup procedure:

- Procedure Name

    Verify the name of the data cleanup procedure.

7. To renumber your build steps, from the View menu, click Renumber.

    ERP 8.0 renumbers your build steps, updating the Sequence field. The renumbering begins with 10 and increments each step by 10 (10, 20, 30, etc.). ERP 8.0 keeps the build steps in the same sequence that you established.

8. To delete a step, choose the step, and then click Delete.

9. When finished revising the data cleanup template, click OK.

Copying a Data Cleanup Template

This task explains how to copy a data cleanup template that you already created.

▶ **To copy a data cleanup template**

From Advanced Operations (GH9622), choose Data Cleanup Procedure Templates (P9646).

1. On Work With Template, click Find.

    Existing data cleanup templates appear.

2. Choose the template you want to copy, then click Copy.

    The Copy Template form appears.

3. Complete the following fields, then click OK:

- Copy From Template

    Enter the name of an existing data cleanup template.

- Copy To Template

    Enter the name for the new data cleanup template.

Deleting a Data Cleanup Template

This task explains how to delete a data cleanup procedure. The application deletes everything associated with the procedure, including deleting it where it existed as a subprocedure under other data cleanup procedures.

► **To delete a data cleanup template**

From Advanced Operations (GH9622), choose Data Cleanup Procedure Templates (P9646).

1. On Work With Template, click Find.

   Existing data cleanup templates appear.

2. Choose the master you want to delete, then click Delete.

   A message box appears to verify that you want to delete the template.

3. Click OK.

Relative and Absolute Paths

An absolute path name begins with the root directory and details the entire path, such as
`Z:\DepServer\CD Templates\Partial Update`. A relative path name begins with a
token, such as `$DEP`. The token represents at least the root directory and possible
contiguous directory paths. For example, `$DEP` may represent `Z:\DepServer`. This relative
path might appear within an applicable field as `$DEP\CD Templates\Partial Update`.
The following list shows the relative path tokens you can use:

- $DEP - Represents the root directory where ERP 8.0 is installed on your deployment
  server.

- $IMAGE - Represents the image path of your software master.

- $CLIENT - Represents the root directory where ERP 8.0 is installed on the
  workstation you are currently using.

- $TEMP - Represents the Microsoft Windows temporary directory of the workstation
  you are currently using.

You do not need to define the tokens. The Product Packaging Tool automatically resolves the
token values based upon your ERP 8.0 installation and other information available to it.

Using Relative Path Tokens

This task explains how to use a relative path token within a field.

▶ To use relative path tokens

From a field that allows relative paths, enter a token followed by the remainder of the path
needed for that field. For example:

        $DEP\CD Templates\Partial Update

Converting Relative and Absolute Paths

ERP 8.0 allows you to convert relative path tokens and absolute path names for those fields
that accept them within the Product Packaging Tools. If any fields use a token, you can
convert the token into an absolute path or you can convert the absolute path into a token. For
example, you can convert any instance of `$DEP` into `Z:\DepServer` or you can convert
`Z:\DepServer` into `$DEP`.

▶ To convert relative and absolute paths

From Product Packaging (GH962), choose OneWorld Product Packaging (P9640).

1. On Work With Software Master, click Find.

   Existing software masters appear.

2. Choose the master for which you want to convert relative and absolute paths, and from
   the Row menu, choose Convert Paths.

   The Work With Batch Versions - Available Versions form appears.

3. Click Find.

Available versions appear.

4. Choose a report version, and then from the Row menu, choose Processing Options.

   The Processing Options form appears.

5. Complete the following fields, and then click OK:

   - FromPath

     Enter the root path or relative path token that you want to change. For example, enter Z:\DepServer.

   - CD ToPath

     Enter the root path or relative path token that you want the FromPath to become. For example, enter $DEP.

6. On the Work With Batch Versions - Available Versions form, choose the version and click Select.

   The Version Prompting form appears.

7. Click Submit.

   The Report Output Destination form appears.

8. Choose to send the report to a printer or to your screen, then click OK.

   ERP 8.0 converts the absolute and relative paths for any fields within the Product Packaging Tools to which this applies.

Troubleshooting

This section lists problems encountered while creating Product Packages and describes tips for solving these problems.

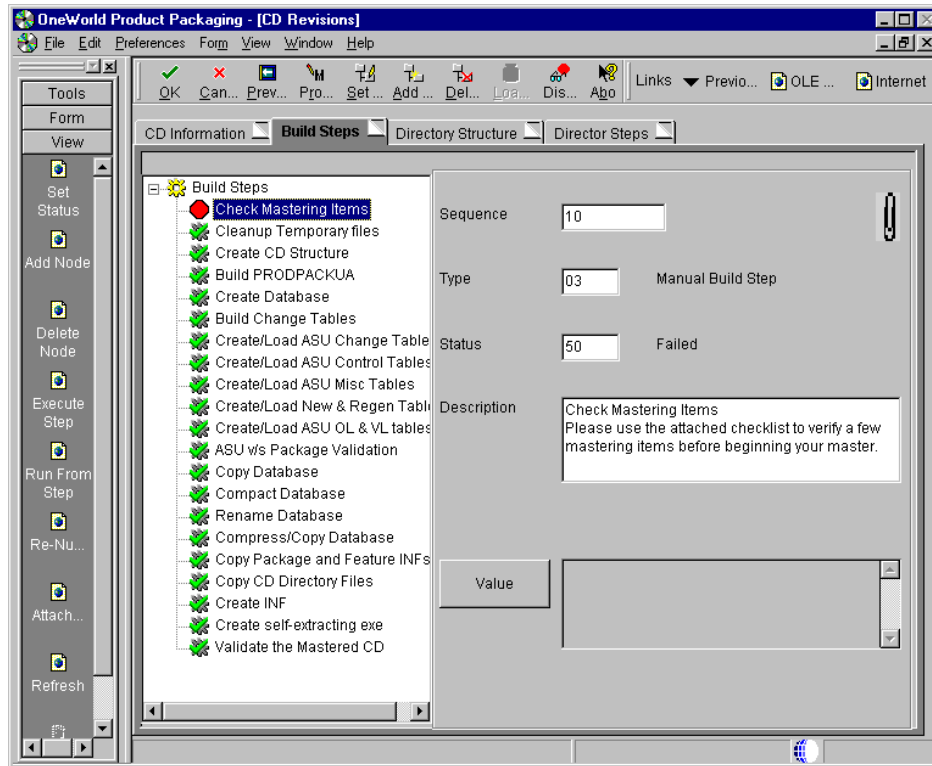## Failure during Check Mastering Items

Problem:

When mastering the CD, the process fails on the step Check Mastering Items.

Solution:

This is a manual build step. It must be executed manually, highlighting the step and selecting Execute Step from the View exit menu. Once that is executed, click on Master CD and proceed.

Failure copying data to the ERP 8.0 – Product Packaging

Problem:

In some cases, when we copy information to the "ERP 8.0 – Product Packaging" Access database, the database surpasses its 1GB limit. If this occurs, the R98403 report will list a "copy failure" error.
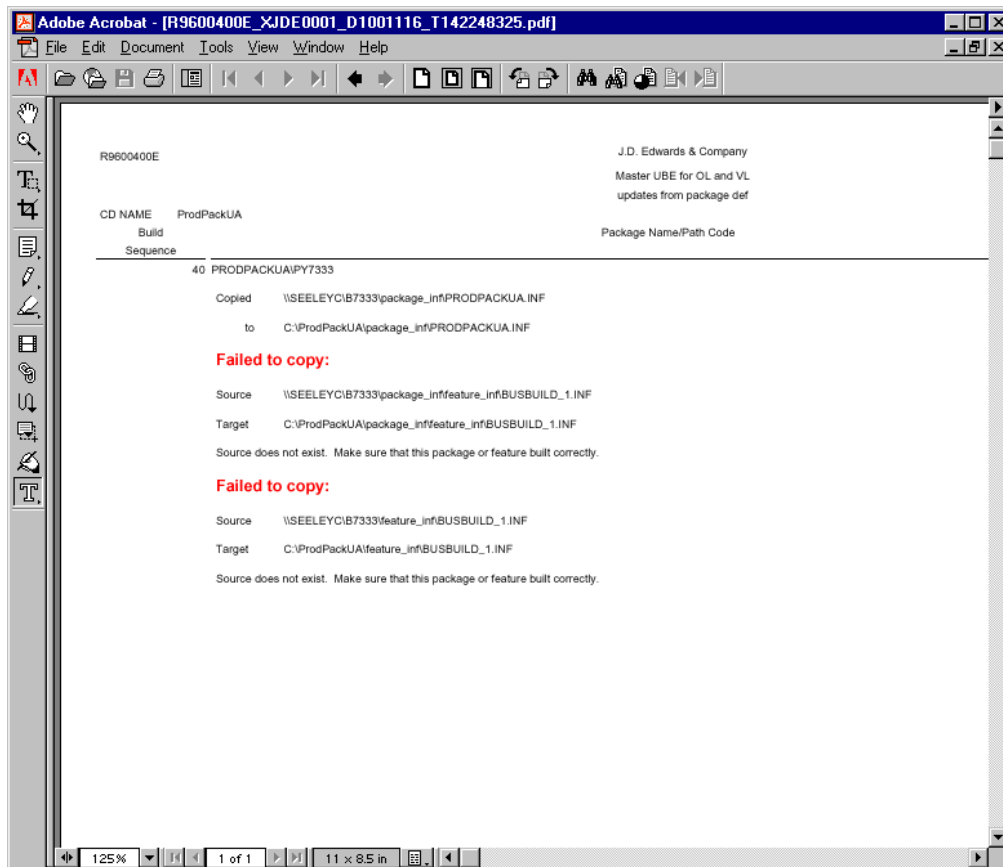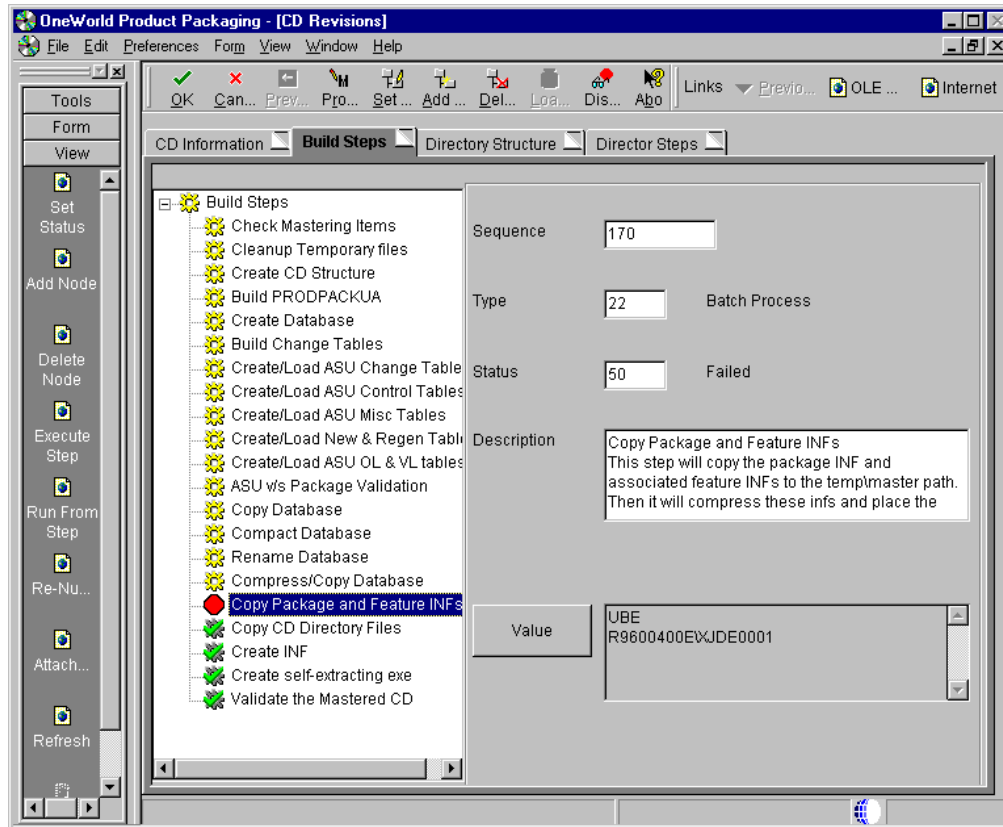
Solution:

Open the Access database and select "Tools|Database Utils|Compact". This will compact the Database to an acceptable size. You will then need to recopy the tables that had copy failures.

1. **Failure to build the Features INF file**

Problem:

The product packaging mastering process fails at the build step "Copy Package and Feature INFs" – report R9600400E. Because features are a new part of the ERP 8.0 Package Build process, update packages are unable to build feature INF files at this time. A sample report is shown below.

OneWorld Product Packaging - [CD Revisions]

File　Edit　Preferences　Form　View　Window　Help

OK　Can...　Prev...　Pro...　Set ...　Add ...　Del...　Loa...　Dis...　Abo

Links ▼ Previo... OLE ... Internet

Tools
Form
View

Set Status
Add Node
Delete Node
Execute Step
Run From Step
Re-Nu...
Attach...
Refresh

CD Information | **Build Steps** | Directory Structure | Director Steps

Build Steps
- Check Mastering Items
- Cleanup Temporary files
- Create CD Structure
- Build PRODPACKUA
- Create Database
- Build Change Tables
- Create/Load ASU Change Table
- Create/Load ASU Control Tables
- Create/Load ASU Misc Tables
- Create/Load New & Regen Table
- Create/Load ASU OL & VL tables
- ASU w/s Package Validation
- Copy Database
- Compact Database
- Rename Database
- Compress/Copy Database
- Copy Package and Feature INFs
- Copy CD Directory Files
- Create INF
- Create self-extracting exe
- Validate the Mastered CD

Sequence　170

Type　22　Batch Process

Status　50　Failed

Description
Copy Package and Feature INFs
This step will copy the package INF and
associated feature INFs to the temp\master path.
Then it will compress these infs and place the

Value
UBE
R9600400E\XJDE0001

Adobe Acrobat - [R9600400E_XJDE0001_D1001116_T142248325.pdf]

File　Edit　Document　Tools　View　Window　Help

R9600400E

J.D. Edwards & Company
Master UBE for OL and VL
updates from package def

CD NAME　ProdPackUA
Build
Sequence

Package Name/Path Code

40　PRODPACKUA\PY7333

Copied　　\\SEELEYC\B7333\package_inf\PRODPACKUA.INF

to　　C:\ProdPackUA\package_inf\PRODPACKUA.INF

Failed to copy:

Source　　\\SEELEYC\B7333\package_inf\feature_inf\BUSBUILD_1.INF

Target　　C:\ProdPackUA\package_inf\feature_inf\BUSBUILD_1.INF

Source does not exist. Make sure that this package or feature built correctly.

Failed to copy:

Source　　\\SEELEYC\B7333\feature_inf\BUSBUILD_1.INF

Target　　C:\ProdPackUA\feature_inf\BUSBUILD_1.INF

Source does not exist. Make sure that this package or feature built correctly.

125%　1 of 1　11 x 8.5 in

Solution:

If Features are included in the selected update package, be sure that the feature INF files are previously created. See the *ERP 8.0 Package Management Guide* for instructions to complete this task.

JDEB7.mdb not Populated

Problem:

The build process completes without error but there are no tables in the JDEB7.MDB in the $TEMP\master directory. This error occurs when the ERP 8.0 - Product Packaging data source is not setup correctly, either in the ODBC data sources or the database data sources.

Solution:

Reconfigure the ODBC data source and the ERP 8.0 database data source for ERP 8.0 - Product Packaging, then repeat the build process.

Failure to copy change tables

Problem: There are no change tables (for instance F960004, F960005, …) in the jdeb7.mdb database, and the jde.log file lists several errors reporting that it cannot find these tables in the Control Tables. This problem indicates that the change tables do not exist in the mastering environment.

Solution: Verify that those tables exist and are set up correctly in the mastering environment.

Error during Workflow Change Table Creation (R988002)

Problem:

When reviewing the report R988002 – Workflow Change Table Creation, page 7 reports an error stating "Unable to locate table in specified data source for section: F98811N".
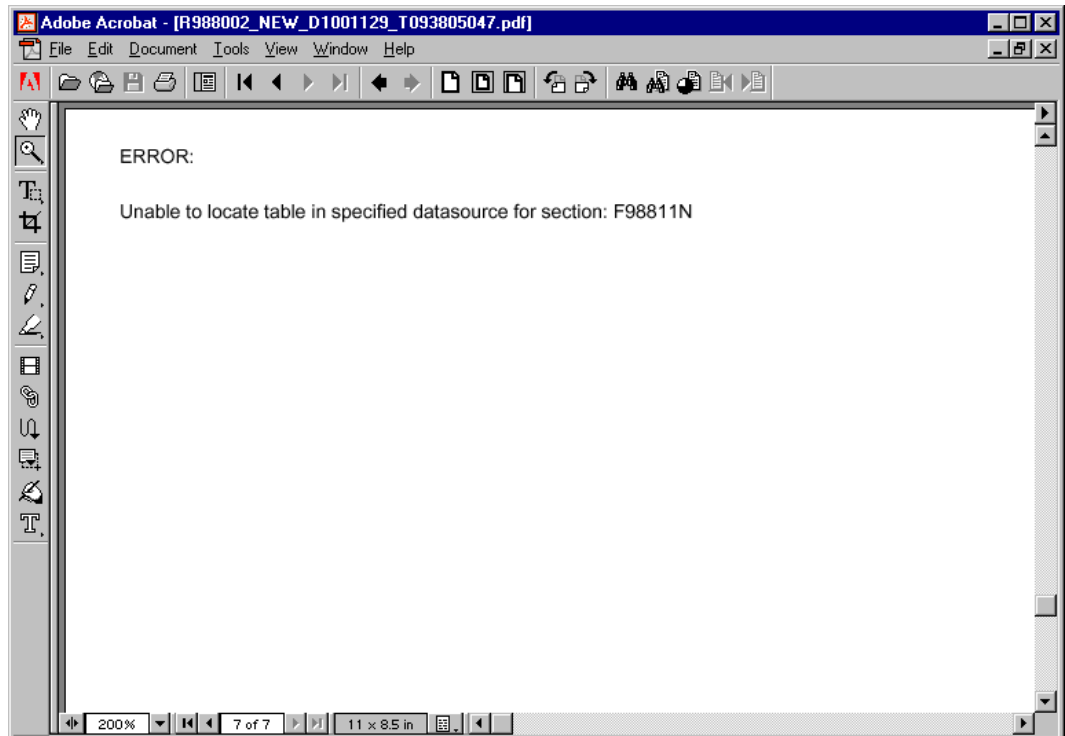
Also the jde.log file includes the following message:

```
[Microsoft][ODBC SQL Server Driver][SQL Server] A column has been
specified more than once in the order by list. Columns in the order
by list must be unique. - SQLSTATE: 37000
```

The problem is that the report R988002 has data sequencing problems with the F98811N table.   The "Change Flag" (CHGF) is listed in the report 4 times, even though it is only present in one place in the actual table.
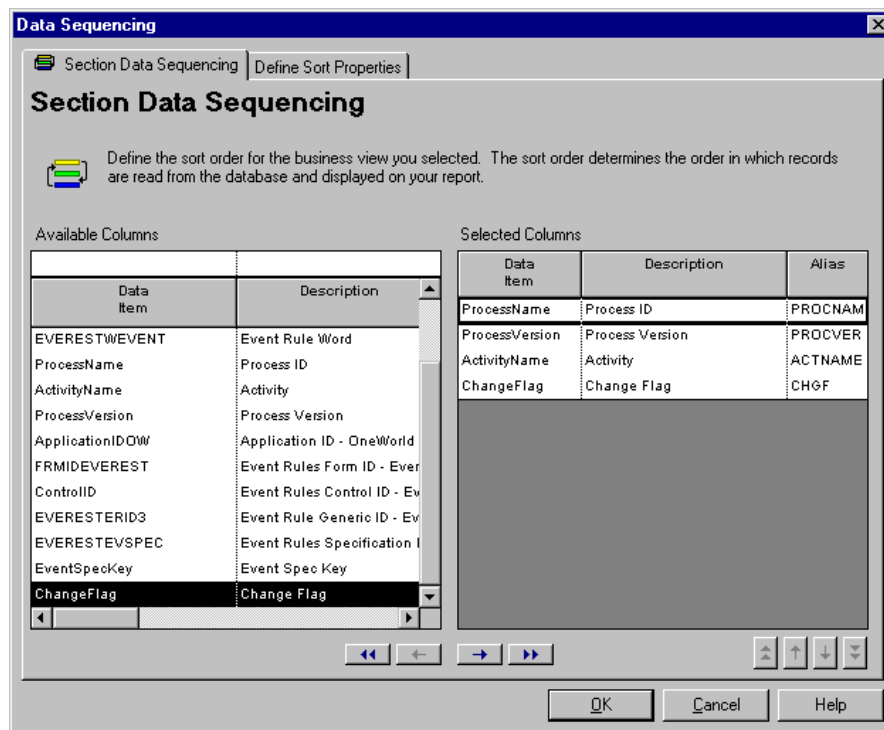
Solution:

Even though this error is listed in the report, the process successfully created the workflow change tables. It is only the printing to the report that is failing.

This problem will be corrected in B9. To prevent the error in ERP 8.0, complete the following steps:

1. Open Report Design Aid for the report R988002, find the section F98811N, and select the Data Sequencing.
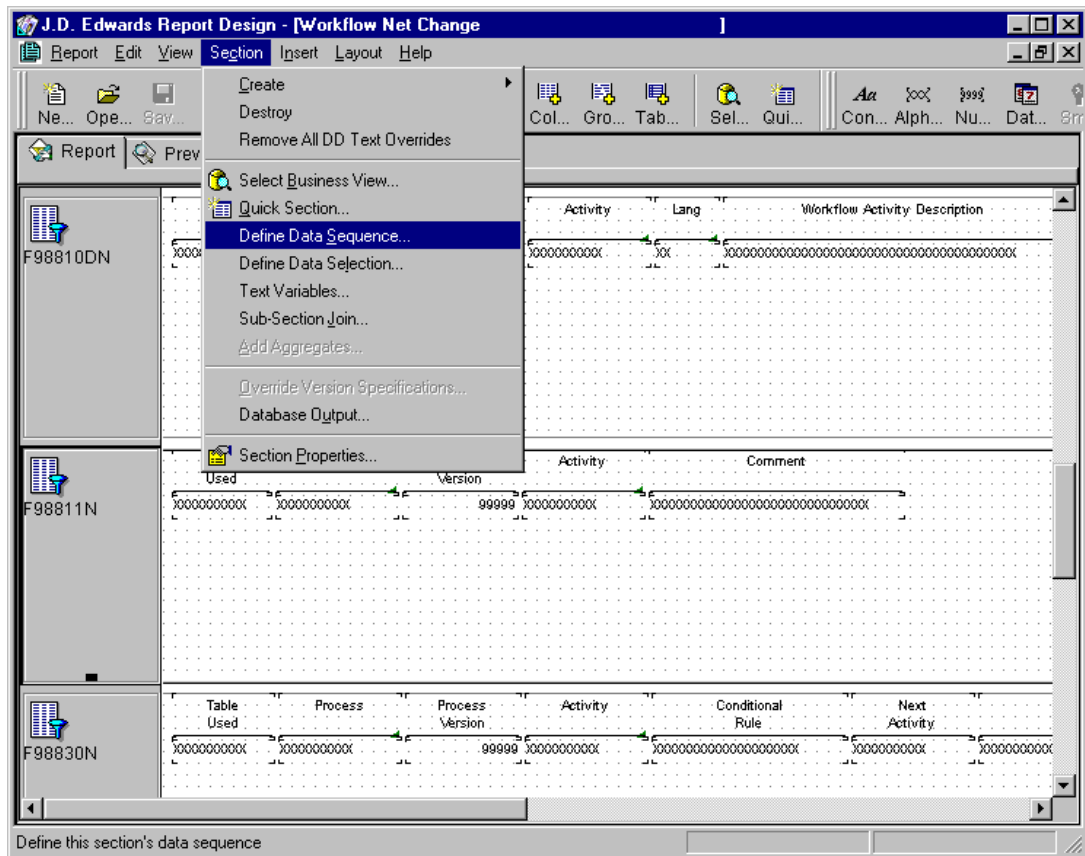
2. Remove the Change Flag from the selected columns and click OK.

3. Save the report.

4. Repeat the above steps to remove the column until it no longer appears.

5. Add the Change Flag data item back as a selected column at the top of the sequencing.

6. Save the report and run the software master again.

Failure to copy custom tables

Problem:

Custom tables were not copied to the jdeb7.mdb database, even though these tables were included in the update package and exist in the environment that the package is built from. This problem is a good indication that the source environment specified in the change table configurator is not setup correctly or that the table exists in that environment.

Solution:

Verify that the specified environment is valid, has tables associated with the environment, and that the custom table cannot be found in that environment.

Unable to find product package after installation

Problem

After running the install manager to install the software master on the new system, the product package is not listed in the Software Updates application. This occurs because the package name does not match the product package name.
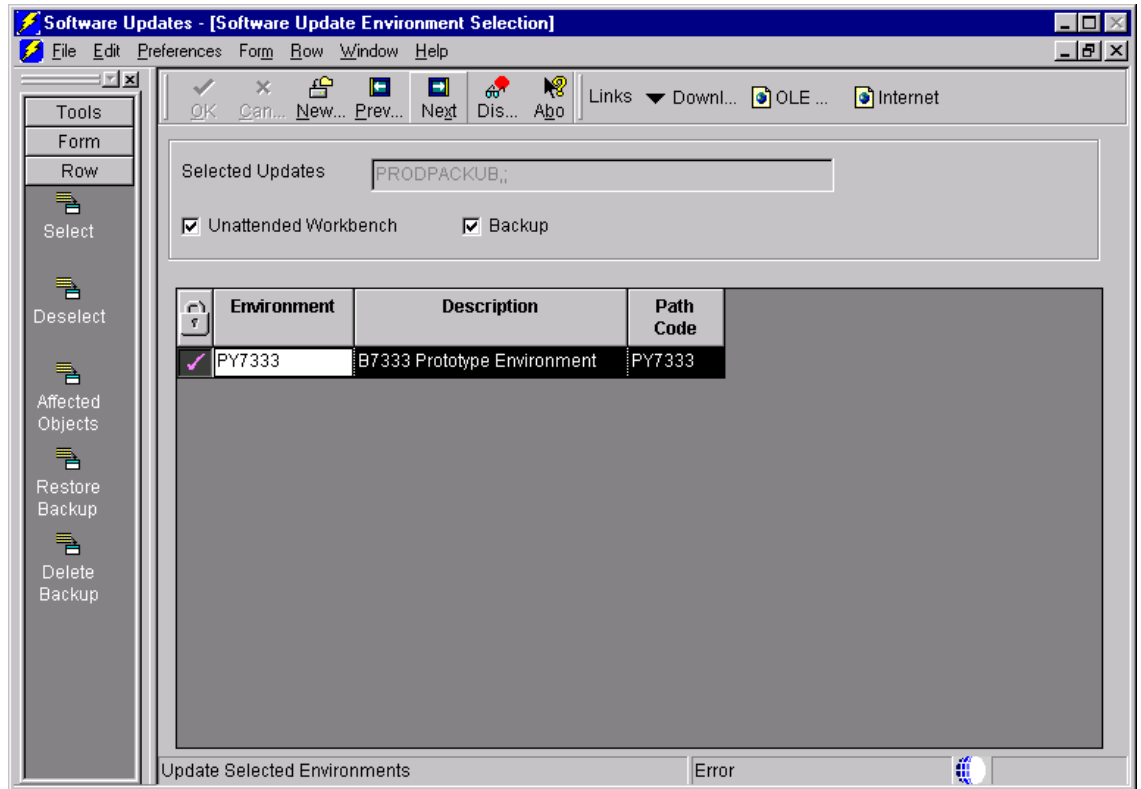
Solution

Re-master the Software Master and ensure that the update package name is the same as the product package name. Also, make sure that the correction ESU JD2325 (SAR 4465163) is installed before you install the product package.

Error selecting an environment in the Software Update application

Problem:

After selecting the path code to install the product package on to in the Software Updates application, nothing happens and there is an error in the status bar at the bottom of the application. The jde.log file has an error like the following:

JDB9900245 - Failed to find F98611 OneWorld SU - PRODPACKNAME in cache

Solution:

1. Ensure that you install the correction ESU JD2325 (SAR 4465163) before you install the product package.

2. Open the Database Data Sources application (P986115), and verify that the data source for the Software Update is created.

   The data source to look for is "OneWorld SU – *PRODUCT_PACKAGE_NAME*", where product package name is the product package name and is in all UPPERCASE letters.

3. If the data source exists but is not in all UPPERCASE letters, manually delete that data source item and create a new data source as shown below:

Data Source Name:	OneWorld SU – *PRODUCT_PACKAGE_NAME*
Data Source Type:	A – Access
DLL Name:	JDBODBC.DLL
Database Name:	OneWorld SU – *PRODUCT_PACKAGE_NAME*
Server Name:	LOCAL
Platform:	LOCAL

Error backing up tables in the Software Update application

Problem:

In the Software Updates application, after selecting the path code and backup, it displays the following error message: "Create Table Failed," and the application stops processing.
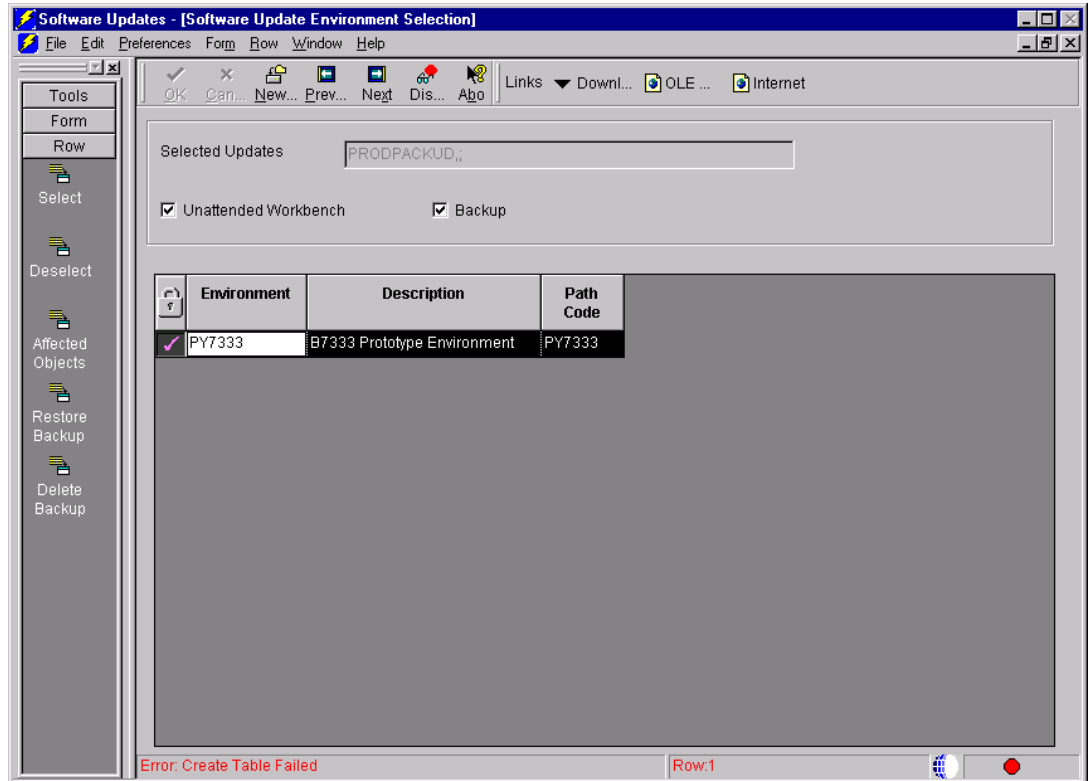
The jde.log file reports the following error:

> JDB9900245 - Failed to find F98611 OWBAK_PRODPACKUD_PY7334 in cache
> JDB3100011 - Failed to get location of table F983051 for environment JDEPLAN
> JDB2100004 - Failed to open table

Solution:

The Software Update application creates a new ERP 8.0 data source and ODBC driver called OWBAK_*PACKAGE_NAME_PATHCODE* that points to a backup database called Planner\Package*PACKAGE_NAME\PATHCODE*.bak\data\backup.mdb. Follow the steps below to troubleshoot the problem:

1. Ensure that the correction ESU JD2325 (SAR 4465163) is installed before you install the product package.

2. Open the Database Data Sources application P986115, and verify that the data source "OWBAK_*PACKAGE_NAME_PATHCODE*" is created, where *PACKAGE_NAME* is the product package name in all UPPERCASE letters, and *PATHCODE* is the selected path code from the Software Updates application. If the data source exists but is not in all UPPERCASE letters, manually delete that data source item and create a new data source item as follows:

Data Source Name:	OWBAK_*PACKAGE_NAME_PATHCODE*
Data Source Type:	A – Access
DLL Name:	JDBODBC.DLL
Database Name:	OWBAK_*PACKAGE_NAME_PATHCODE*
Server Name:	LOCAL
Platform:	LOCAL

3. Verify that the ODBC data source is created and is pointing to a valid location and database.

4. Exit out of ERP 8.0, log back in, and try the process again.

Problems with Object Librarian records

Problem:

There is the potential problem for objects that belong to a project in the original system that was create with a SAR that contains an alpha character.   This problem would be evident when trying to enter that project after installation on the destination system.

Solution:

After the package is installed on the destination deployment server, open the created ERP 8.0 - Product Packaging jdeb7.mdb database and modify the F9861 table. In the SIMSAR column, make sure that no records have alpha characters for values. Change all alpha characters to '0'.

We are creating an ESU to correct the problem. Until that ESU is available, make sure that the project name contains only numeric characters – no alpha characters are allowed.