



## Compiere 3.6.2 Release Notes

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September 29, 2010

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## Compiere 3.6.2 Release Summary

Compiere 3.6.2 introduces the new calendar review report, ABC rank analysis for cycle counting, new cash journal expense/receipt types and application dictionary copy attribute. Compiere 3.6.2 also includes 22 customer/partner enhancement requests and 96 customer/partner bug fixes.

All bug fixes and new functionality from 3.6 and 3.6.1 are already part of this service pack, including the new Manufacturing and Warehouse Management integration, Visual Editor Enhancements, a new print format editor based on a flash interface, new cycle counting inventory functionality and significant performance improvements. For more details on the changes made in previous releases please see the release notes from <http://wiki.compiere.com/display/docs/Compiere+Release+Notes>

Certain features in Compiere require a Compiere Professional or Enterprise Edition subscription. Contact a Compiere Authorized Partner or Compiere Sales (<http://www.compiere.com/company/contact-us.php>) to acquire Compiere subscription.

Compiere may include certain prototype features and beta functionality as indicated in their respective user interfaces with a beta checkbox. These are not recommended for production. They are intended only for evaluation as beta functionality.

### Audience

This guide is designed for Compiere Business Partners and Customers. It provides essential information for current Compiere administrators planning to install or migrate (upgrade) to Compiere 3.6.2.

### Prerequisites

- Working knowledge of Compiere ERP and CRM
- Compiere Web Store Access
- Sun Java JDK 1.6.0 Update 5 or Later
- Database Oracle XE, Oracle 10gR2, Oracle 11g, or EnterpriseDB Postgres Plus Advanced Server 8.3

## Software Management

### Previous Installations

You can download the Compiere 3.6.1 from <http://www.compiere.com/wstore>. The migration tool will bring you up directly to Compiere 3.6 plus all the cumulative fixes included in the service packs without having to migrate to an intermediate release.

### Recommended Infrastructure

- Sun Java JDK 6 Update 5 or Later (not just JRE)  
- also known as Sun Java SDK.
- Database Oracle XE, Oracle 10gR2, Oracle 11g, or EnterpriseDB Postgres Plus Advanced Server 8.3.  
**Tip:** It is Mandatory to use a Unicode character set.
- Database approved Linux Operating System, Windows 2003 or Windows XP
- TCP/IP connection and Internet access
- Disk Space: > 5 GB (includes database)
- Swap Space: > 1GB
- Memory: > 1 GB
- Firefox Browser 3.5 is recommended for Web User Interface.

### Process to Log Support Requests

To ensure timely service for any issues, please use the Compiere's Case Management system. For details please review the [Support Requests](#) page on our website.

### Update/Migration Procedure

See [Appendix A](#)

### Install Procedure

See [Appendix B](#)

### Application Extensions

See [Appendix C](#)

### Command Line Scripts

See [Appendix D](#)

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## New In Compiere 3.6.2

The following is a detailed description of the enhancements made available in Compiere 3.6.2.

### Calendar Review Report

This report reviews Calendars for accuracy by listing gaps between periods, period numbers and years.

It also identifies any standard periods that overlap with other standard periods or adjusting periods that do not overlap with standard periods. Similar validations are enforced when creating or updating periods. The Calendar Review Report does not automatically update any calendar . You must review the report and make manual updates if necessary

### ABC Rank Analysis

ABC Rank Analysis Criteria for cycle counting provides you with an additional option to sort and assign ranks to products. There are three seeded rules:

- Product velocity by dollar value sold
- Product velocity by number of products sold
- Product/Component of highest dollar value on price list.

You also have the option to seed your own custom rule with a Java implementation class

### Cash Journal Expense/Receipt Types

Expense/Receipt Type allows you to classify cash expenses and receipts by custom types. You can define types in the Expense/Receipt Type window and assign accounts to be used. When entering Cash Journals, select the appropriate Expense/Receipt Type for expense and receipt lines. There are two seeded types - General Expenses and General Receipts

### Application Dictionary Copy Attribute

Uncheck the Copy checkbox in the table column definition in the Application Dictionary to prevent the contents of the column from being copied over to the newly created record when using the Copy Record functionality. You can override the copy attribute for specific windows by setting the Copy Overwrite attribute for the required fields. Certain columns like DocumentNo, DocAction, Created, etc. are not copied over even if the Copy checkbox is enabled

## New Features from Compiere 3.6 and 3.6.1

### Cycle Counting (available since 3.6.1)

Cycle counting provides you with the option of carrying out systematic physical inventory counting of products in your locator. Using the Analysis group you can define the rules and frequency with which the products needs to counted in a warehouse. You can assign products to these analysis groups and run the generate Cycle count process to generate Inventory cycle count documents which the warehouse operator can use to count products. Optionally, user can lock down the locator for material transactions while the actual counting is in progress for the locator. User can define their custom rules to sort products within each rank in the analysis group using the ABC rank sort criteria window.

When migrating from earlier release, the seeded ABC rank sort criteria are not populated by default. So user will have to define them in the system once. There are three seeded rules:

- Least Onhand Quantity
  - o Name:- Least Onhand Quantity
  - o class Name:- org.compiere.model.LeastOnHand
  - o Based on Price List :- false
- Earliest Ship Date
  - o Name:- Earliest Ship Date
  - o class Name:- org.compiere.model.EarlyShipDate
  - o Based on Price List :- false

- Highest Price
  - o Name:- Highest Price
  - o class Name:- org.compiere.model.HighestPriceList
  - o Based on Price List :- True

## Changes to M\_Storage – Performance Improvement (available since 3.6.1)

In this release, Compiere has introduced a new table M\_StorageDetail that replaces existing table M\_Storage as the container for information about product quantity.

This change was made to eliminate unnecessary contentions on M\_Storage by the many critical business flows (e.g. the processing of a Purchase Order with 10,000 lines previously would hold up other short running programs such the processing of many sales orders of 10 lines each) and thereby increase the concurrency between the said flows.

As a part of this change, Compiere will migrate existing quantity information from M\_Storage to M\_StorageDetail. This migration is implemented as a migration step that will be automatically launched when an instance is migrated from a version earlier than 3.6.1 to version 3.6.1+. To ensure the correct migration of data, Compiere will only initiate the migration if the M\_StorageDetail table is empty prior to migration.

In addition to the migration that Compiere has performed, users will need to perform additional tasks if one or more of the following situations are applicable:

Situation	Recommended Changes
Custom code and application dictionary entries that refer to the now obsolete MStorage class	Refer to the new MStorageDetail and Storage classes
Custom code and application dictionary entries that refer to the now obsolete M_Storage table	Refer to the new M_StorageDetail table. Alternatively, users can also refer to the new M_Storage_V view. Do note that references to the M_Storage_V view will in general perform worse than direct references to M_StorageDetail table
Custom columns have been added to M_Storage	Evaluate if they should be created on M_StorageDetail and/or M_Storage_V

## Bulk Updates – Performance Improvement (available since 3.6)

Bulk Updates improves the overall system throughput by reducing the database record-locking contention on key tables such as M\_Storage. The amount of time a record is locked for update is directly dependent on the amount of time it takes for the entire transaction to either commit or rollback. With the application of the new “bulk update” architecture, the elapsed time of each transaction should be substantially reduced, leading to significant improvements in the overall system throughput.

Bulk updates have been enabled for the following processes: Orders, Invoices, Warehouse Tasks, Shipments and receipts processing.

New for 3.6.2: Bulk updates have also been enabled for the import processes for business partners, products, orders, invoices and locators.

## Sequence Cache – Performance Improvement (available since 3.6)

A new “Gapless” flag has been added for the ID and document sequences. When the flag is checked, sequences continue working in the same way as in previous releases where the sequence row is locked until the transaction is committed, allowing it to keep the sequence numbers without gaps even if the process fails. This fulfills a legal requirement in some countries where document numbers must be consecutive and auditable, but it generates contention issues when multiple users try to create the same type of documents. As an alternative for customers that

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can allow to have gaps in their document numbers you can deselect the “Gapless” flag to allow a more efficient and without contention management of the sequence numbers, similar to the database dependent sequences.

By default for new instances all the document sequences continue being gapless, and internal ID sequences (usually for columns with the name <Table>\_ID) won't be gapless to improve performance.

For existing instances migrating to 3.6, all existing tenant sequences will have the gapless flag unchecked, with better performance, but with the possibility of losing sequence numbers in case of process or environment failures.

**IMPORTANT:** Please review the accounting and legal requirements in your country. If it is mandatory to have gapless document numbers please be sure to check the gapless flag for your document sequences. If it is not mandatory and your business allows the possibility of having gaps in the document numbers, we recommend that you uncheck the flag for all sequences. Notice that most tables have two sequences: one called <Table> for the internal IDs, and another DocumentNo\_<Table> for the document numbers.

## Technical Notes

- Since 3.6.1 the following standard parameters need to be modified for any webservice request:
  1. "Organization" changed to "#Organization" (URL encoded as "%23Organization")
  2. "Tenant" changed to "#Tenant" (URL encoded as "%23Tenant")
  3. "Role" changed to "#Role" (URL encoded as "%23Role")
  4. "Warehouse" changed to "#Warehouse" (URL encoded as "%23Warehouse")This change is necessary as while performing GET on Views, it is necessary to distinguish the context parameters from query parameters. E.g. If user passes the parameter "Organization" instead of "#Organization", it will be treated as a filter parameter for a view that returns data from multiple organizations.
- Internet Explorer 8 is now a certified browser for the Compiere web UI
- Important Notes from previous releases:
  - Web UI is now based on [Google Web Toolkit \(GWT\) 2.0.1](#)
  - Compiere does not support Business View Layer Component on EnterpriseDB (Postgres Plus AS) due to some technical constraints to enforce the Compiere security model. You can get Jasper Reports to work in EnterpriseDB by setting up the Jasper reports directly against the Compiere schema, but the report developer will need to manually apply the security rules. The following reports can be used as an example to setup Jasper Reports in EDB: Trial Balance, Profit and Loss Statement, and Balance Sheet.
  - The Payflow Pro integration provided by Compiere to process payments has been updated to use the new Payflow Pro SDK and updates to the payment processor data from the bank window are required. If you continue to use outdated SDKs after January 2010 your payment processing will stop.

## Web User Interface

## Compiere Professional Edition

In order to get properly acquainted with the Web User Interface, please read the section on “Using the Web Application” in the user documentation.

At present, there are still some known features available in the “Java Swing” User Interface that are not yet available in Web User Interface. Most of these features are scheduled for a future release.

The following features are currently **Not Available** in the Web User Interface. However, they are fully functional in the “Java Swing” User Interface:

- Resource & Schedule Info Windows – Info Window available from the ‘View’ menu to view Scheduled Resources.
- Resource Assignment – A Form used to schedule a resource accessed from the Assigned Resource field in a Sales Order, Project, or Expense Report.

- Personal lock – A security feature accessible from the toolbar used to lock a specific record to keep the record private. It is also used as a method to set security access rules for specific records.
- Archive Viewer – A window used to view the Archived Records. Records or Documents can be archived via the toolbar from the document viewer or automatically via a setting available in the tenant window.
- Ability to print mass shipments – A process available from the Main Menu used to print multiple shipments.
- Print from info windows – A button accessible from any Info window used to print a screen shot of the information.
- Ability to email documents/reports as attachment – A button available from the toolbar of any report or document that opens an e-mail dialog box with the report attached as a .pdf file allowing users to send the report via e-mail.
- Product attribute grid – A form available from the Main Menu which allows users to select an Attribute and view a grid of which products are available with the selected attributes.

**Important:** The Firefox Browser 3.0/3.5 is recommended when using Compiere with the web user interface.

When using Internet Explorer, verify the options: “Always switch to new tabs when they are created” and “A new tab in the current window” are enabled: Under Tools> Internet Options> General Tab, open the Tab settings.

## Product Enhancements for Compiere 3.6.2

SR	SUMMARY
10016729	New date promised field for the Generate Shipments (Manual) window
10017303	New validations added at the time of saving a period record and new calendar review report
10017319	Project:Project:Standard Phase - When I create a new record 'Standard Phase' field is already populated according to the previous current record while it should be empty and it ca
10017360	beginning balance should be updated when saving bank statement/and or when running prepare
10017643	From my experience, Compiere can do several payment for a specific order, or invoice by using Payment window (or received payment for a down payment) which is related to other tha
10017986	Encrypt Database Password The database user and password should not be stored in plain text in the properties files - it needs to be encrypted.
10018084	Enhancement to allow you to copy phases and tasks for all project types
10018247	When creating a project and setting a Project Type, only a category of Service (Charge) will copy phases and tasks to the project. Project Types in the category of Asset, General,
10019115	The sum in the bank statement does not take in consideration the currency used and is calculated on the amount instead of the converted amount.
10019540	Function Edit-Copy Record for a Business Partner The Open Balance of the BPartner source gets copied into the new Business Partner. The Open Balance of the new Business Partner sho
10020632	Enhancement. When creating a Sales Order and setting the Shipping Method to Shipper, we would like the Freight Carrier to be defaulted to a value on the Business Partner. This woul
10020646	WMS Bug: None of the following screens allow the appropriate fields to be zoomed or requiered. - Wave Planning window - Wave Planning Process - Generate Putaway process
10021333	Update HTML UI to allow export of reports in different formats from all places where reports are l
10021565	Creating more than one Cash Book. As per manual more than one Cash Book can be created per organisation. I have created an additional cash book, however when I create invoice and t
10021573	new window "Cash Journal Expense/Receipt Type"
10021639	period open/close: no changelog The proccess for opening/closing periods does not generate changelog records for the C_PeriodControl records that it updates.
10022351	Product, Partener view

	The buttons Ok, Clear, Cancel should have assigned short keys:
10022625	Changelog: ChangeLogType Currently AD_Changelog entries are being created for both initial values and updates. This has a huge impact on the record count in the changelog table.
10023170	user can override the accounting class for seeded documents
10023246	External callout: no WindowNo In the Swing callout API and the annotation based callout API for GWT the "WindowNo" is part of the arguments. For "External" callouts for GWT (meth
10023277	GWT versus Swing: ModelValidator.login We use the ModelValidator.login method to prevent users from logging under some conditions. In the swing interface the String result of this
10023278	GWT versus Swing: column with process and list reference GWT UI always displays the name of the process, regardless of the current value of the column

## Fixed Issues for Compiere 3.6.2

SR	Summary
10016401	PrintFormat Privileges If user has read only access to a window, ensure that changes cannot be made and saved in Sort tabs (shuttle tabs) e.g. Users with read only access
10016462	Translation Problems / Issues
10016520	Column Sort Order in the Print Format window does not show translated values.
10016531	Import Bank Statement
10016612	Conversion in Multi-Currency Bank Statement
10016637	Country translation error in location editor
10016641	Import product decimals rounded for volume
10016905	Swing UI - Payment Selection (Manual) 1. Shift F4 shortcut doesn't work - Still needs to be fixed.  2. Tab order is wrong: Fixed
10017138	SwingUI - the shortcut keys fail intermittently in various windows. Hard to reproduce but the one place that it is reproducible is in the Role window and navigating to the differen
10017155	HTML UI - In Recent Items list, unable to distinguish between an Invoice (Customer) and Invoice (Vendor), Purchase Order and Sales Order. Items in the list are marked as either ord
10017403	Update in reference the name of the regions from Spain
10017435	Read only checkboxes When a checkbox is displayed as readonly, the label is displayed light grey / disabled, while all other fields are shown with a normal label.
10017489	Import Inventory window - a Product search key gets created when it shouldn't.
10017771	Saving new workflow node resets action of previous node
10017890	Hello we found several invoices in this customer production system in an invalid state.  The problem stem from the fact that an attempt to reverse those invoices was made, the docs
10018230	Cash Journal Allocation
10018975	Mandatory fields save warning & navigation When you create a new record and then close the window, there will be a warning about mandatory fields
10019056	On Import Order window, when copying a record that has been imported, the fields Imported, Order, Order Line and Error are copied across when they should be cleared because they ap
10019289	User can migrate (by using up and down arrow) to any record without saving a newly created record in any tab.
10019442	Attribute Set Instance dialog (scrollbar) A customer of ours would like to have a vertical scrollbar on "Attribute Set Instance" dialog.
10019514	After an Order, Invoice or Shipment/Receipt is completed, the focus is not put on the form anywhere. Hence none of the keyboard shortcuts can work, so a user can't insert a new ord



10019671	On tenant setup, when 'serveremail' is ticked, and 'smtp authentication' is enabled, mail fails with following trace. However, if smtp authentication is not ticked, no failure.
10019937	When using import order or import invoice, could you confirm how the system consolidates records? I believe that it is on document number (if present), document type, business part
10020216	Confirmations: On the Material Receipt > Receipt Line > Confirmations tab, if a confirmation has been entered, the Description field is enable for updated, and all other fields are
10020505	The ordering of the search fields for a window does not correspond to the selection sequence of the application dictionary (both swing and web ui)
10020541	We have found that the Compiere web edition does not allow the user to print directly to the printer, when the "print preview" option has been turned off.
10020647	Web UI: When running searches in any window, sorting the results by a column, viewing an individual record in single record mode, and then returning to the search window, the sort
10020851	Bug: In SR 10019937 it was confirmed that importing orders/invoices were consolidated based on document number (if present), document type, business partner and price list/currency
10020960	Bug: Within the WebUI the Material Transaction window has 2 search buttons. In the Swing UI there is only 1. There should only be 1 in the Web UI.
10021284	We can't seem to get the "Server EMail" feature to work. When this option is selected on the client record the email still originates from the client machine.
10021308	On screen "Attribute Set Instance" the tab "Invoice" is not filtered with the invoices of the Instance selected on the principal tab. (e.g. print screen)
10021416	Lookup loading timing data logged on Warning level While testing out the 3.4 release I am seeing a lot of messages somewhat like this: -----> Lookup.run: AD_Column.AD_Colu
10021417	Loader - Too many records I often observe the following message in console while working with the swing UI: -----> Lookup.run: AD_Column.AD_Column_ID: Loader - Too many re
10021427	"Not licensed" license text for components distributed by partners
10021470	Saving Queries returns incorrect message when trying to save view without name. see image
10021517	In email.send() there is no time out set for the connection, so if the connection to the smtp server hangs (which sometimes happen in production without throwing an exception
10021608	Migration issues with change log for columns with values T (true) or F (false)
10021626	more than 1000 active pricelist versions When checking our customers AD_Issue tables we recently encountered some ORA-01795 error messages, produced by the InfoProduct class.
10021652	Process Generate PO from Sales Order A customer of ours uses the Generate PO from Sales Order a lot. They're having some difficulties finding out what went wrong when purchase ord
10021796	WebStore - Non standard port issue: If the application server setup use non standard web ports (for example web port=8080; ssl=8443) some web store redirections does not work.
10022203	In swing ui, when tabbing into a date, we have to tab twice before the date is highlighted. In older version it only required one tab.
10022276	Incorrect error message when setting a window's Data Access to System Only and try to run in Web UI. Get the error message: java.lang.IndexOutOfBoundsException: Index: 0, Size
10022277	In Web UI, in Window, Tab and Field window, in the Field Sequence and Multi-Row Sequence tabs, unable to move the top field. The Down arrow has no effect.
10022290	When selecting the process button for any window the focus is put on the Document Action field. If selecting the enter button on the keyboard the focus is lost and the mouse ha
10022292	Release Wave (summarised) - Process Row field process lines when it should process orders. In Release Wave (Summarised) orders are displayed to a user. If the Process Row val
10022293	When linking a Business Partner to an organisation, in the Swing UI the Link Organisation button displays the linked org's name. In the Web UI it doesn't.
10022353	Product view- When selecting a row it should be marked as selected also by changing the color into yellow. The row selected should yellow whenever the field i
10022521	Attribute Set Instance changed on original record when editing copy record (Product). When copying a product record with an attribute set and attribute set instance, the original
10022629	Login with gardenadmin and go to invoice (vendor). Click on organization. You can start typing the name of the organization (HQ or Store) press return or tab and the orga

10022753	Set the record indicator text, ###, for all faces of the record number button - up, down, up hover and down hover. Previously the record number was being updated for only the up or up hover states.
10022817	[Manufacturing] Cannot complete "Work Order Transaction" for the "Work Order movement" type with the error message: Push components still required.
10022837	Error in web UI and admin page when using Oracle listener with a non-default port.
10022839	New Workflow nodes do not respect tenant boundaries.
10022934	PO Price Variance using incorrect cost to calculate DR and CR entries associated with PO Match record. This is causing major accounting problems for one of our clients, an update
10022960	The dunning entry creation do not show errors when errors appears.
10022982	Cannot create a simple menu with only 1 window
10023032	Periods are defined in Compiere using dates only (no timestamp) - STARTDATE and ENDDATE. The dates defined for each period are stored in the database using the following format -
10023052	The 'Print Invoices' process results in an error when 'Consolidate' is flagged. InvoicePrint.startProcess: Unbalanced save/restore state operators. [18]
10023092	I am having strange behavior where after I print payments/checks, the documentno is changed the next time I go in and view the payment.
10023108	The Accounting Facts for Customer Returns seem to have the quantities wrong. The Qty on the DR side of the transaction should be positive (+) and the CR side should be negative (-
10023126	I have setup an Attribute Set for Lot tracking and I have made it Always Mandatory but have added Excludes for the C_OrderLine table. I try to create a PO for the item setup with
10023140	User with no acces to '*' organisation can't create a new print format from 'my report' in the Web UI.
10023144	If you use a virtual column as a selection column, Searching does not work on Web UI ! compiere us the columnname instead of the column sql. this Problem occured in version 3.3, 3
10023146	When updating a location from the location field, It does not update the field
10023157	when I creating import bank statement record, with negative value for transaction and statement amounts, after creating payment, bank statement transaction amount is converted
10023165	In GWT UI, when saving some date before 1970, date is saved but the day before. Exemple, in purchase order, create new record and set date promised to 17 april 1966.
10023214	#Web UI - filtering on virtual columns does not work#
10023228	error in vFormat
10023233	#Role -> Info window access -> DB Error# If the login language is not the default (English), the info windows list is empty when trying to add a new info window access.
10023243	Print Engine & field starting with newline We have had some support calls from users that got a "Can't add attribute to 0 length text" error dialog popup while using reports from
10023249	Error in report when you try to print a translated column. In the 'Transaction Detail by Account' Report, If you try to print it in a different language you have an error because t
10023251	We have been trying to clear the payment lines via the bank statement process – and have found a bug. We are unable to select multiple lines – in many cases.
10023290	The Request tab on the Request window containse a where clause that is not correctly parsing the variables @#AD_User_ID@ and @#AD_Role_ID@.
10023294	Unable to add business partner contacts without providing email address
10023297	Synchronize Terminology crashes.
10023354	GWT versus Swing: Number Process Parameter
10023357	No access to Print Format Window: window toolbar displayed
10023358	GWT versus Swing: disallow editing Print Format  In Swing, when access to the "Print Format" windows is disabled for a role, the "edit" functionality for reports in the viewer (whi
10023371	System throws ORA-01000 - maximum open cursors exceeded while importing a large document (15,000 lines) like PO/SO, Inventory etc. ( max in oracle allowed is 65k)
10023396	Unable to close window when someone else has modified current record
10023397	the report "open order" based on the view "RV_OrderDetail" which uses the fonction "productAttribute" gives an error (see screenshot)

10023401	Issue on Firefox when trying to open attachments with extension in upper case: instead of opening the attachment immediately you get a pop-up window where you need to select the ap
10023406	In the web version of Compiere, there is an issue with the Shipping Rule field
10023414	Migration error from 3.4.1 to 3.6.1 After migration completed with error, no invoice, shipment and order line can be printed.
10023430	The report "Unallocated Payment" is not correct
10023440	After upgrade to 3.6.1 find this issues Inventory Move, if logon in Spanish, no movement line show product name check log and show C_Product_Trl.Name invalid
10023448	Sequences for VALUE fields are the same than Sequence for Tables ID Fields
10023462	Balance aged at an earlier date
10023466	Unable to prepare pick tasks although stock is available in warehouse,
10023467	While completing putaway tasks system increases allocated quantity at destination locatation,
10023476	Setup new server for new client and the Accounting Facts do not display the Account - the database shows that the wrong account_id is being used in the fact_acct table (looks as if
10023481	compiere bug at the list of invoice if you have several languages (EN / FR / DE , for example)
10023523	In Country Region and City Window,For United States Country, the name of "AK" should stand for "Alaska" not "Arkansas" in Region.
10023524	When creating work order transactions from a work order, it was found that the value for the qtyEntered was being pulled in from the database as an integer, when it is numeric. Thi
10023526	When running the Accounting Entries by Date report, we are given a pdf with an empty table, and find this error repeated over and over in the logs (for different tables)
10023531	Error "Negative inventory not allowed" even when inventory exists.

## Known Issues in the Migration Process

Warnings and Error Messages you may see during the Migration steps.

Migration Issues – Warning/Error Messages	Database	Comments
ORA-00001: unique constraint... violated	All	This might indicate referential issues in your pre-migration data. Review the problem data.
ORA-01408: such column list already indexed	All	This is an acceptable warning message.
ORA-01440: column to be modified must be empty to decrease precision or scale	All	This is an acceptable warning message.
ORA-02296: cannot enable	All	This might indicate referential issues in your pre-migration data. Review the problem data...
ORA-02275: such a referential constraint already exists in the table	All	This might indicate referential issues in your pre-migration data. Review the problem data. This is an acceptable warning when upgrading CBIZ and getting errors for the tables AD_Dashboard*
ALTER TABLE S_ResourceType MODIFY ChargeableQty NUMBER(10) DEFAULT NULL Failed sql statements ERROR: cannot alter type of a column used by a view or rule Detail: rule _RETURN on view rv_asset_delivery depends on column "lot" - ALTER TABLE A_Asset_Delivery ALTER Lot TYPE VARCHAR(255) , ALTER Lot SET DEFAULT NULL No Key & No Parent - Table AD_RecentItem	EnterpriseDB	This is an acceptable warning message.
	All	This is an acceptable warning message

Migration Issues – Warning/Error Messages	Database	Comments
While executing RUN_Setup, refreshing an existing instance =====> DB_PostgreSQL.getDataSource: DB_EnterpriseDB[null] [12] java.lang.IllegalArgumentException: DataSource with name 'CompiereDS' already exists!	EnterpriseDB	This is an acceptable warning message
While executing RUN_Setup -----> ModelValidationEngine.addClasses: GardenWorld: compiere.model.MyValidator - java.lang.ClassNotFoundException: compiere.model.MyValidator [12] -----> ModelValidationEngine.addClasses: Extended Units of Measure: org.compiere.xuom.XUOMModelValidator - java.lang.ClassNotFoundException: org.compiere.xuom.XUOMModelValidator [12]	All	This is an acceptable warning message
ORA-01452: cannot CREATE UNIQUE INDEX; duplicate keys found - CREATE UNIQUE INDEX AD_PrintFormatItem_Unique ON AD_PrintFormatItem (AD_PrintFormat_ID,Name)	All	Migration of additional components (.car) with print format items won't work as expected.

## Known Issues in the Install Process

Warnings and Error Messages you may see during the Import steps.

Install Issues – Warning/Error Messages	Database	Comments
-----> g.a: DROP SEQUENCE T_Spool_Seq -----> g.a: ORA-02289: sequence does not exist	All	This is an acceptable warning message.
-----> DB_PostgreSQL.convertStatement: Convert error! Converted statement Number=2 (CREATE OR REPLACE VIEW ...	EnterpriseDB	This is an acceptable warning message.
-----> DB.saveError: DBExecuteError - ORA-00001: unique constraint (COMPIERE.C_REGION_NAME) violated [15] -----> MRegion.saveNewInsertSQL: Not inserted - C_Region [15] -----> ProgressPanel.publish: Unable to import Region, requires UNICODE database [15] =====> DB.executeUpdate: INSERT INTO C_Region (AD_Client_ID,AD_Org_ID,C_Country_ID,C_Region_ID,Created,CreatedBy,Description,IsActive,IsDefault,Name,Updated,UpdatedBy) VALUES (0,0,216,438,TO_DATE('2006-02-23 15:43:34','YYYY-MM-DD HH24:MI:SS'),0,'???(Miyasaki)','Y','N','???',TO_DATE('2006-02-23 15:43:34','YYYY-MM-DD HH24:MI:SS'),0) [null] [15] java.sql.SQLException: ORA-00001: unique constraint (COMPIERE263.C_REGION_NAME) violated; State=23000; ErrorCode=1 at oracle.jdbc.driver.DatabaseError.throwSQLException(DatabaseError.java:125) at oracle.jdbc.driver.T4CTTloer.processError(T4CTTloer.java:305) at oracle.jdbc.driver.T4CTTloer.processError(T4CTTloer.java:272)	All	These are acceptable if your database is not set for Unicode (UTF8).
At the very end of the install process or when manually executing utils/RUN_Support 13:07:55.094 Compiere.startup: Client lap-fr/10.104.139.177: C:\Compiere2 - Java HotSpot(TM) Client VM 1.5.0_11-b03 - Windows XP 5 .1 Service Pack 2 [15] Exception in thread "AWT-EventQueue-0" java.lang.NullPointerException at javax.swing.plaf.basic.BasicScrollBarUI.layoutHScrollbar(BasicScrollBarUI.java:676)	All	No effect on the functionality. You may ignore this error.
Error after clicking Save on the RUN_Setup window =====> CConnection.createConnection: jdbc:oracle:thin:@//lap-fr:1521/xe, (1) AutoCommit=true,TrxIso=READ_COMMITTED - ORA-01017: invalid username/password; logon denied [12] -----> CPreparedStatement.<init>: ALTER TABLE AD_System MODIFY Summary NVARCHAR2(2000) [12] java.lang.UnsupportedOperationException: No DBConnection at org.compiere.util.DB.getConnectionRW(DB.java:228)	All	No effect on the functionality. You may ignore this error
Error installing the sample application extension XUOM Failed sql statements: ORA-00955: name is already used by an existing object - CREATE INDEX M_Product_ProductCategory ON M_Product (M_Product_Category_ID) - java.sql.SQLException: ORA-00955: name is already used by an existing object	All	This is an acceptable warning message
Error installing the sample application extension XUOM Create Views ***** Starting to create views for entity: XUOM Created view #1 for entity: XUOM Failed sql statements	All	This is an acceptable warning message

Install Issues – Warning/Error Messages	Database	Comments
<pre>&lt;&lt;ERROR: ERROR: relation "m_product_expensetype" already exists - CREATE UNIQUE INDEX M_Product_ExpenseType ON M_Product (S_ExpenseType_ID) - java.sql.SQLException: ERROR: relation "m_product_expensetype" already exists&gt;&gt; ... same error for other indexes... &lt;&lt;ERROR: ERROR: constraint "fk208_10919" for relation "m_product" already exists - ALTER TABLE M_Product ADD CONSTRAINT FK208_10919 FOREIGN KEY (C_SubscriptionType_ID) REFERENCES C_SubscriptionType (C_SubscriptionType_ID) - java.sql.SQLException: ERROR: constraint "fk208_10919" for relation "m_product" already exists&gt;&gt; ...same error for other constraints...</pre>		

## Known Issues in Compiere 3.6.2

Issues you may encounter using Compiere 3.6.2

Issue	Database	Solution
Null pointer exception when creating CAR file in Web UI		Use Swing.
Web UI: Description is not available in workflow editor. Process requisition workflow. You should be able to see the description (ex: {10: Total Lines >100})		
Web UI: When any of the Workflow Review (i.e. Initial Tenant Setup Review) windows are displayed and then the menu tree is expanded over the workflow review, the icons for the steps in the workflow overwrite the menu options.		
Web UI: There is no button Panel at the bottom of the page for workflow Navigation in workflow editor window.		
Error when executing BVL reports on EnterpriseDB JasperReportServer.startReport: BVL Schema does not exist	EnterpriseDB	BVL is currently not supported on EDB
Firefox only. Error message when uploading an attachment to a window: An error occurred while uploading the attachment. Please reload the record and try again The attachment as such works but only gives an error. In order to see the attachment to a record, reopen the window.		
Issues with pdf maker printing accent, grave characters (SR 10019315). Previous fix had to be reverted as the awt fonts stopped working		
Error when trying to post a matched Invoice: Java.lang.ArithmeticException: /by zero" at org.compiere.acct.Doc_MatchInv.createFacts(Doc_MatchInv.java:159)		

For a current list of open issues please query the list of public requests from our request system  
<http://www.compiere.com/support/support-requests.php>.

---

## **Appendix A**

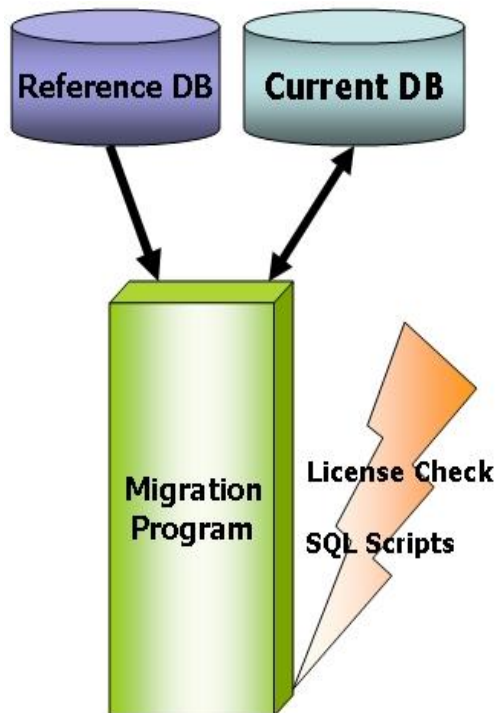
### Migration Instructions

## Compiere 3.6.2 Migration Instructions

These instructions are for upgrading an existing installation of Compiere. If you are doing a new installation please refer to the installation instructions on appendix B.

### Prerequisites

- A valid Support contract
- Sun Java JDK 6 (SDK) – Update 5 or later (not just JRE)
- Database Oracle XE, Oracle 10gR2, Oracle 11g or EnterpriseDB Postgres Plus Advanced Server 8.3.



### Preserving Customizations

Compiere will not modify any customizations - as long as the customizations are marked appropriately. By default, all added records in the dictionary will have the entity type "User Maintained":

Entity Type	User maintained
	Applications
	Compiere
	Customization
	Dictionary
	User maintained

For changes to existing dictionary records, in the Change Audit window mark as 'Customizations' the changes that you need to preserve before running the migration.

Before performing the migration, run it in the test mode to ensure all customizations will be preserved.

### Migration Steps



---

Migration Consists of the Following steps:

- Preparation
- Test Mode (optional)
- Migrate to a New Release
- Post Migration Steps

## Preparation

Use the following steps to prepare for the Migration:

- Server needs to have access to the Internet for http (port 80) and https (port 443).
- Stop the application server by executing `utils/RUN_Server2Stop`
- Backup the database
- If you are running EnterpriseDB 8.2 or older you must upgrade to EnterpriseDB Postgres Plus Advanced Server 8.3

## Test Mode (optional)

As an optional step you may want to run migration in test mode. This allows the ability to evaluate the actions taken when running it against the database. Please note that the first step (resolve ID conflicts) will not show the correct future IDs in test mode. It is expected to get errors in test mode as the database changes are not being executed, but this is a useful tool to evaluate the schema changes that are about to be done.

Follow the `RUN_setup` steps for a regular migration from the following section, but on step 19 leave the 'Test Only' checkbox marked.

If the program marks certain wanted tables for deletion, then create the table in the data dictionary (Window Table/Column) with the Entity Type *User Defined* or your own entity type.

If the program marks certain wanted columns for deletion, make sure that the column has the Entity Type *User* or *Application*. If the wanted column has the Entity Type Data Dictionary or Compiere and it is marked for deletion, then copy it under another name and mark the new column as *Custom* or *Application*. The same applies to windows, tabs, fields, etc.

Mandatory User or Application Columns must have a default value defined in the database, e.g. `ALTER TABLE someTable MODIFY (myColumn DEFAULT 'myDefault')`, otherwise adding new records will result in an error.

## Migrate to a New Release

Use the following steps on the Application Server box for migrating to the new release:

- 1) If upgrading from 3.2.1 or older you must rename the existing Compiere2/jboss folder to uptake the new JBoss version
- 2) If upgrading from 3.0.x you must delete all the .car files from Compiere2/data/
- 3) Download and unzip/untar the distribution file, (e.g. Compiere\_3XX.X.zip) making sure to overwrite any existing files
- 4) Execute **RUN\_setup**. Verify all your environment settings and click Save to continue. If you get any errors in the parameters validation, you'll see a red icon right next to the parameter with the problem; make the required changes, click Test to run the validation again and then click Save to continue.

Note: The screen shots show version 3.2.0\_Beta but these also apply for 3.6.2.

The screenshot shows the 'Compiere Server Setup - Release 3.2.0\_Beta' window. It has a menu bar with 'File' and 'Help'. The configuration is organized into several sections:

- Java Home:** C:\Program Files\Java\jdk1.6.0 (with a folder icon and a green checkmark).
- Java VM:** sun (dropdown menu).
- Compiere Home:** c:\compiere2 (with a folder icon and a green checkmark).
- KeyStore Password:** (masked with dots, with a green checkmark).
- Application Server:** lap-js-new (with a green checkmark).
- Server Type:** jboss (dropdown menu).
- Deployment:** c:\compiere2\jboss\server\conf (with a folder icon and a green checkmark).
- JNP Port:** 1099 (with a green checkmark).
- Web Port:** 80 (with a green checkmark).
- SSL:** 443 (with a green checkmark).
- Database Server:** lap-js-new (with a green checkmark).
- Database Type:** oracleXE (dropdown menu).
- Database Name:** xe.
- Database Search:** xe (dropdown menu).
- Database Port:** 1521.
- System Password:** (masked with dots, with a green checkmark).
- Database User:** compiere.
- Database Password:** (masked with dots, with a green checkmark).
- Mail Server:** lap-js-new (with a green checkmark).
- Admin Email:** info@lap-js-new.
- Mail User:** info.
- Mail Password:** (masked with dots, with a green checkmark).

At the bottom, there are three buttons: 'Test' (with a wrench icon), a help button (with a question mark icon), and 'Save' (with a floppy disk icon). An 'Ok' button is visible at the very bottom left.

- 5) The Compiere Public License Opens. Click "Yes, I Understand and Accept" to continue.

The screenshot shows the 'Compiere - License Agreement' window. The title bar says 'Compiere - License Agreement'. The main content area has the following text:

**COMPIERE PUBLIC LICENSE**  
**Version 1.3**  
Contact [Compiere](#) for licensing alternatives.

**Preamble**

BY INSTALLING OR USING THE SOFTWARE PROVIDED TO YOU BY COMPIERE, INC. ("SOFTWARE"), YOU ARE AGREEING ON BEHALF OF YOURSELF OR THE ENTITY LICENSING THE SOFTWARE ("CUSTOMER") THAT CUSTOMER WILL BE BOUND BY AND IS BECOMING A PARTY TO THE LICENSE AGREEMENTS REFERRED TO HEREIN AND THAT YOU HAVE THE AUTHORITY TO BIND THE ENTITY LICENSING THE SOFTWARE. IF CUSTOMER DOES NOT AGREE TO ALL OF THE TERMS OF THE REFERENCED LICENSE AGREEMENTS, DO NOT INSTALL THE SOFTWARE. CUSTOMER HAS NOT BECOME A LICENSEE OF, AND IS NOT AUTHORIZED TO USE THE SOFTWARE UNLESS AND UNTIL IT HAS AGREED TO BE BOUND BY THE TERMS OF THE LICENSE AGREEMENTS REFERRED TO HEREIN. THE "EFFECTIVE DATE" FOR THIS AGREEMENT SHALL BE THE DAY CUSTOMER INSTALLS THE SOFTWARE. The Software is licensed under the GNU General Public License (GPL), Version 2, except that certain software packaged with the Software (the

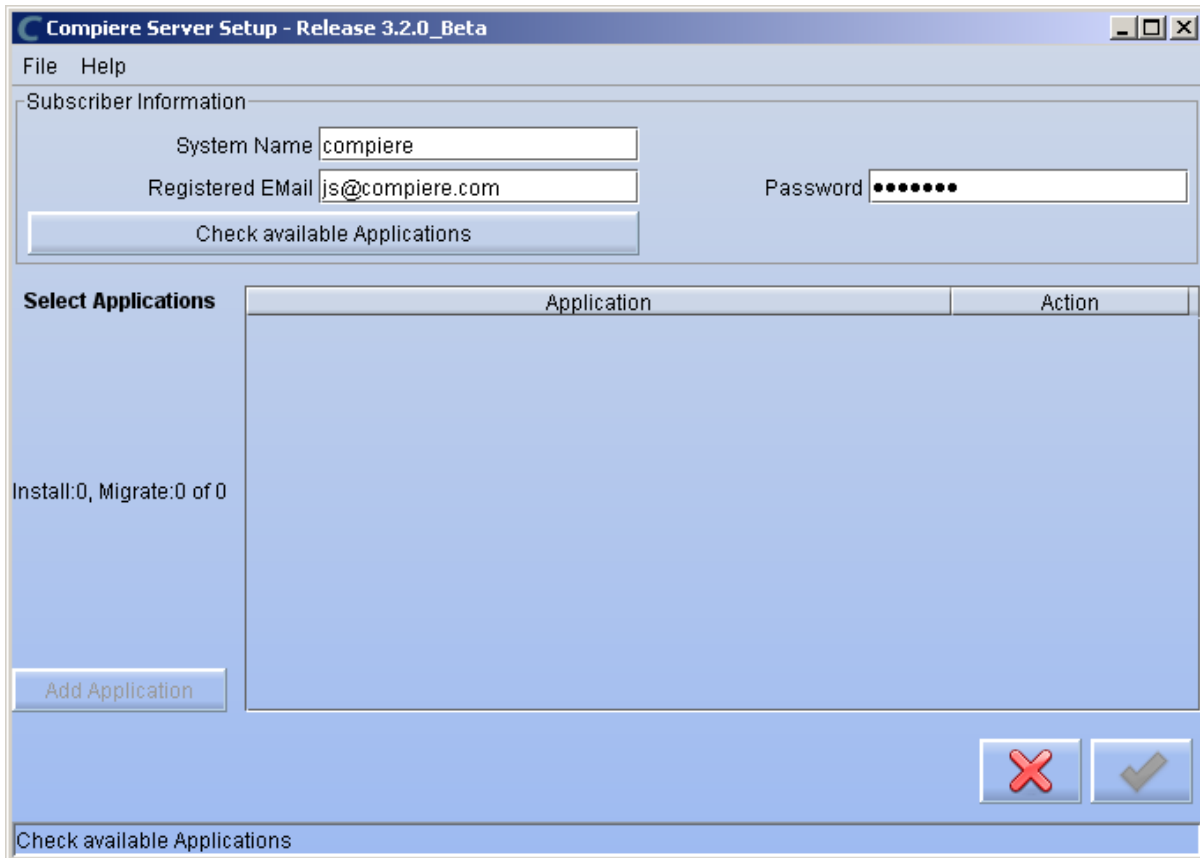
At the bottom, there is a question 'Do you accept the License ?' followed by two buttons: 'No' (with a red X icon) and 'Yes, I Understand and Accept' (with a green checkmark icon).

- 6) If you haven't set a security key file the following prompt will display. Click 'OK' to continue.



- 7) The Next step is to provide the Subscriber Information. Current customers should provide the subscriber information (System Name, Email and Password) exactly as it was registered in the Compiere Web Store to get a complete list of applications.

Click Check Available Applications to get a list of applications that are available to be installed.



**Note:** To install additional applications once you have installed or migrated to the latest Compiere Core version, you must select Compiere Core plus any additional applications to install, and then run Migration.

- 8) Select the applications that you want to migrate and select the action **Reinstall/Migrate**. Compiere Standard is the core application that must always be installed or migrated to the latest release, but you also may choose additional applications provided by Compiere or any of our authorized partners.

If you do not wish to install or migrate any of the applications listed, be sure to change the action to –None- To install new applications change the action to New Install

**IMPORTANT:** If you don't provide the correct email/password or if you don't have Internet connection you won't be able to select Compiere Professional or any of the other optional components

The screenshot shows the 'Compiere Server Setup - Release 3.2.0\_Beta' window. It has a menu bar with 'File' and 'Help'. Below is the 'Subscriber Information' section with fields for 'System Name' (filled with 'compiere'), 'Registered EMail' (filled with 'js@compiere.com'), and 'Password' (filled with dots). A 'Check available Applications' button is below these fields. The 'Select Applications' section contains a table with columns 'Application' and 'Action'. The table lists several applications, all with 'Reinstall/Migrate' in the Action column. To the left of the table, it says 'Install:6, Migrate:6 of 6'. Below the table is an 'Add Application' button. At the bottom right are two buttons: a red 'X' (cancel) and a green checkmark (OK). The status bar at the bottom says 'Select Applications'.

Application	Action
Compiere Standard 3.2.0 (Requires accepting License)	Reinstall/Migrate ▼
Compiere End User Layer 3.2.0 (Requires accepting License)	Reinstall/Migrate ▼
Compiere Manufacturing 3.2.0 (Requires accepting License)	Reinstall/Migrate ▼
Compiere Professional 3.2.0 (Requires accepting License)	Reinstall/Migrate ▼
Compiere Warehouse Management 3.2.0 (Requires accepting License)	Reinstall/Migrate ▼
Extended Units of Measure 1.0	Reinstall/Migrate ▼

- 9) Next, read and accept the Compiere Public License agreement.  
**Hint:** You might get more than one license agreement, depending on the applications that you are installing.  
Notice that XUOM is a sample application extension

The screenshot shows the 'Compiere Standard 3.2.0 - License Agreement' window. It has a title bar with the window name and a close button. The main content area has the title 'COMPIERE PUBLIC LICENSE' and 'Version 1.5'. Below this is a paragraph of text explaining the license. Then, there is a section titled 'Preamble' followed by a detailed paragraph of legal text. At the bottom, there is a question 'Do you accept the License ?' with two buttons: 'No' (with a red X) and 'Yes, I Understand and Accept' (with a green checkmark).

**COMPIERE PUBLIC LICENSE**

**Version 1.5**

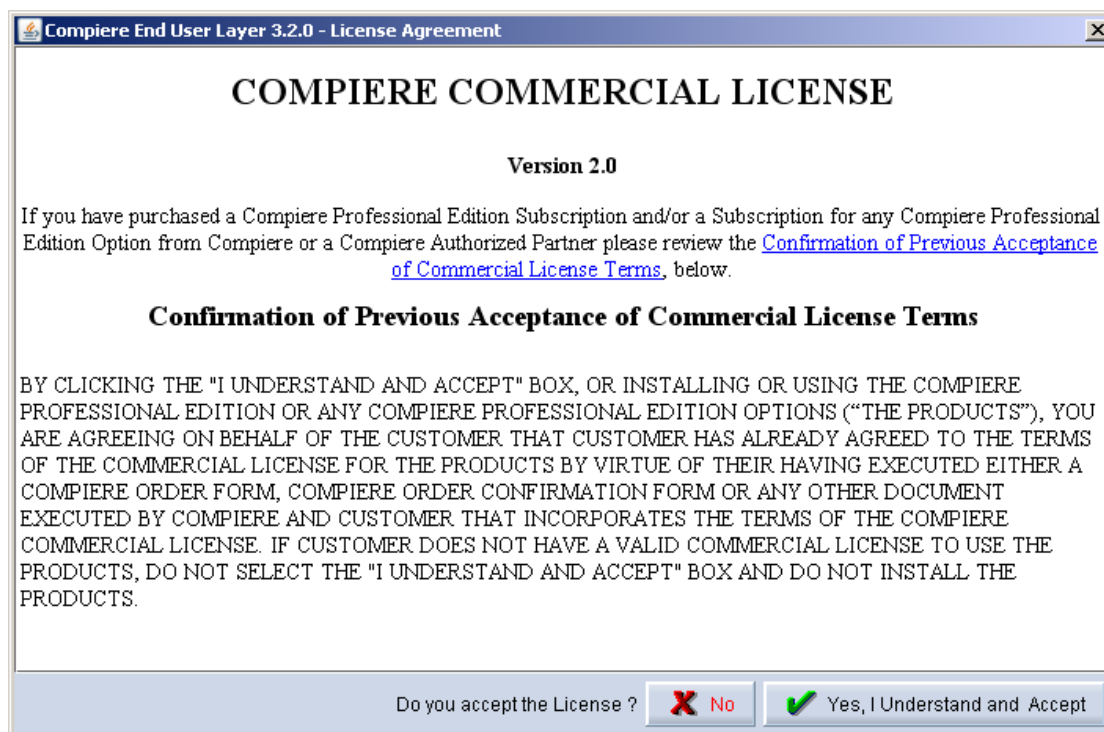
This Compiere Public License does not apply if you are subscribing to the Compiere Professional Edition or any of the Compiere Professional Edition options or if you are using an Evaluation version of the Compiere Professional Edition. If you are using an Evaluation version of the Professional Edition and you elect not to purchase the Compiere Professional Edition at the conclusion of the evaluation period then your use of the Software will be governed by the Compiere Public License after the evaluation period ends.

**Preamble**

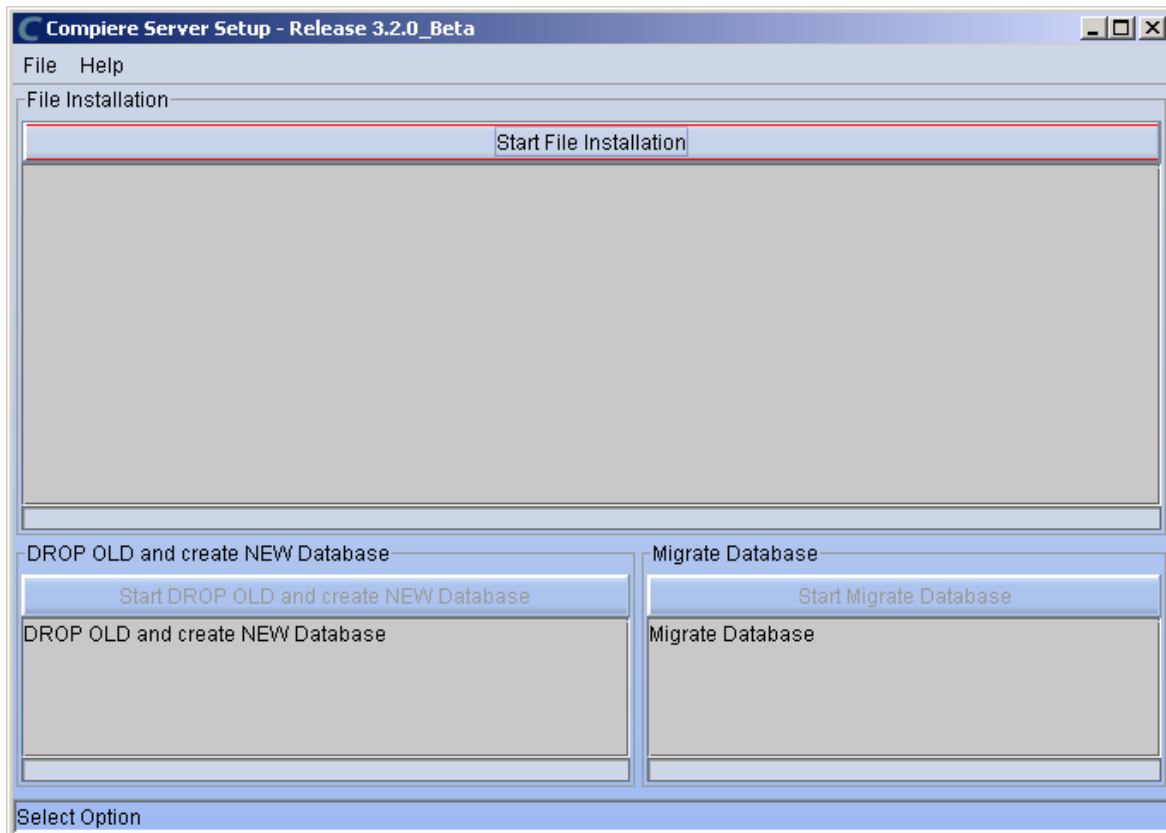
BY INSTALLING OR USING THE SOFTWARE PROVIDED TO YOU BY COMPIERE, INC. ("SOFTWARE"), YOU ARE AGREEING ON BEHALF OF YOURSELF OR THE ENTITY LICENSING THE SOFTWARE ("CUSTOMER") THAT CUSTOMER WILL BE BOUND BY AND IS BECOMING A PARTY TO THE LICENSE AGREEMENTS REFERRED TO HEREIN AND THAT YOU HAVE THE AUTHORITY TO BIND THE ENTITY LICENSING THE SOFTWARE. IF CUSTOMER DOES NOT AGREE TO ALL OF THE TERMS OF THE REFERENCED LICENSE AGREEMENTS, DO NOT INSTALL THE SOFTWARE. CUSTOMER HAS NOT BECOME A LICENSEE OF, AND IS NOT AUTHORIZED TO USE THE SOFTWARE UNLESS AND UNTIL IT HAS AGREED TO BE BOUND BY THE TERMS OF THE LICENSE AGREEMENTS REFERRED TO HEREIN. THE "EFFECTIVE DATE" FOR THIS AGREEMENT SHALL BE THE DAY CUSTOMER INSTALLS THE SOFTWARE. The Software is licensed under the GNU General Public License (GPL), Version 2, except that certain software packaged with the Software (the "Auxiliary Software") is subject to the terms of Compiere's Auxiliary Software License, which can be located at the following URL: <http://www.compiere.com/terms/auxiliary-software-license.pdf>, the terms of which are hereby incorporated by reference. Furthermore, Compiere notifies Customer that certain other software including programs licensed from third parties have been included in the Software ("Third Party Software"). Customer's use of the Third Party Software is subject to the terms and conditions imposed by the licensors of such Third Party Software, which may differ from the GPL and the Auxiliary Software License. Customer must review the relevant licenses for

Do you accept the License ?

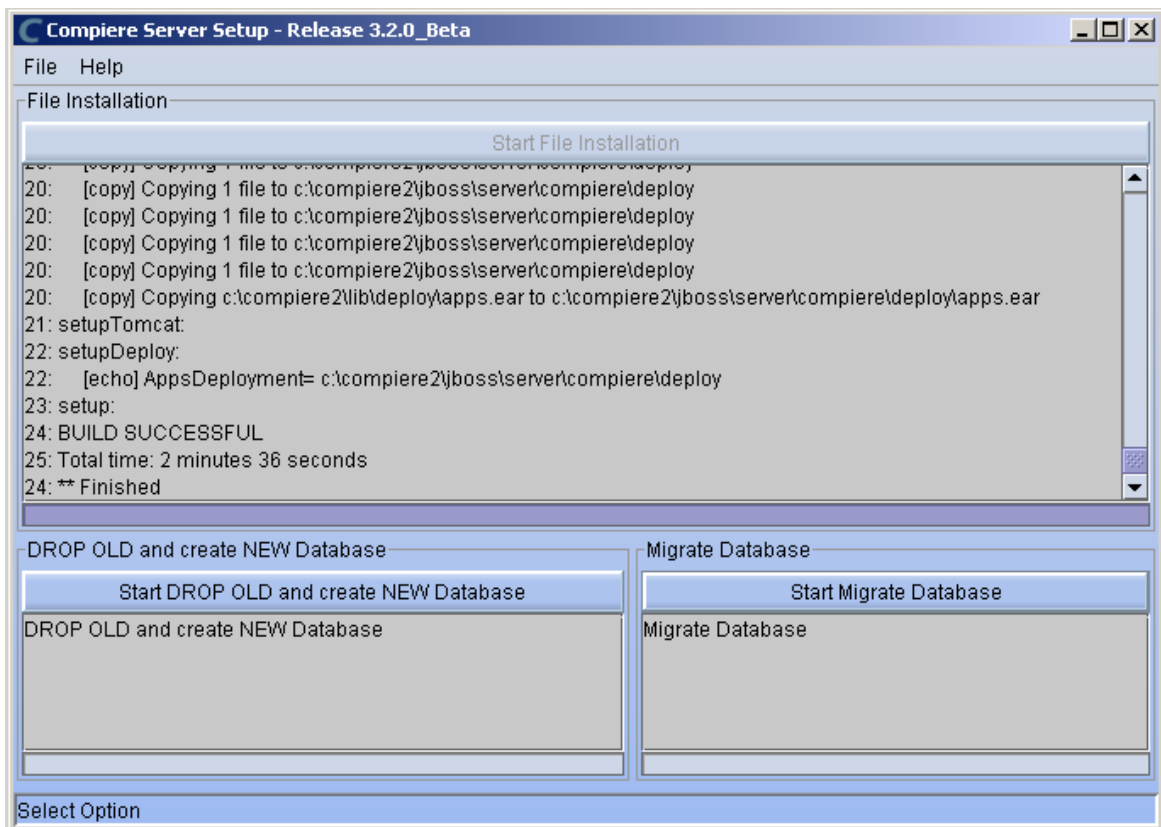
- 10) If you are installing Compiere Professional, you will receive a Commercial license agreement. Please read and accept the license agreement, in order to continue.  
**Hint:** You might get more than one license agreement, depending on the applications that you are installing.



- 11) Click on Start File Installation



12) When the File Installation has completed click on Start Migrate Database.



- 13) Provide the following information exactly as it was registered in the Compiere Web store and click **Check License** to validate your asset information (Note: This information may already be populated if it was entered in the system window)

- System Name
- Registered Email
- Password

Compiere Support 3.2.0

System Name: compiere

Registered Email: js@compiere.com

Support Email:

Target URL: jdbc:oracle:thin:@//lap-js-new:15

Support Expires: 2010-02-06 00:00:00.0

Support Units: 0

Supported Users:

Support Level:

Source URL: file:/c:/compiere2/data/compiere

Source UserID:

Source Password:

☒ Existing Support Contract

Compiere Standard: Licensed (pdf licensed), Expires 02/06/2010 (in 494 days), Seats: 1 (Actual: 0), Status: U

Compiere Professional: Not Licensed

Check entries and press OK to submit.

Start Migration

Cancel

Check License

**Tip:** If you get the “Core Invalid” error after selecting the ‘Check License’ button, that is an indication that you did not select the appropriate action for the Core component in step #5. In this case, Exit the setup and support windows and execute RUN\_setup again selecting Standard plus any other components to install.

- 14) Click on “Start Migration”.

Compiere Support 3.2.0

System Name: compiere

Registered Email: js@compiere.com

Support Email:

Target URL: jdbc:oracle:thin:@//lap-js-new:15

Support Expires: 2010-02-06 00:00:00.0

Support Units: 0

Supported Users:

Support Level:

Source URL: file:/c:/compiere2/data/compiere

Source UserID:

Source Password:

☒ Existing Support Contract

Compiere Warehouse Management: Compliant, Expires 02/06/2010 (in 494 days), Seats: 1 (Actual: 0)

Compiere Manufacturing: Compliant, Expires 02/06/2010 (in 494 days), Seats: 1 (Actual: 0)

Compiere End User Layer: Compliant, Expires 02/06/2010 (in 494 days), Seats: 1 (Actual: 0)

Compiere Warehouse Management Information updated.

Compiere Manufacturing Information updated.

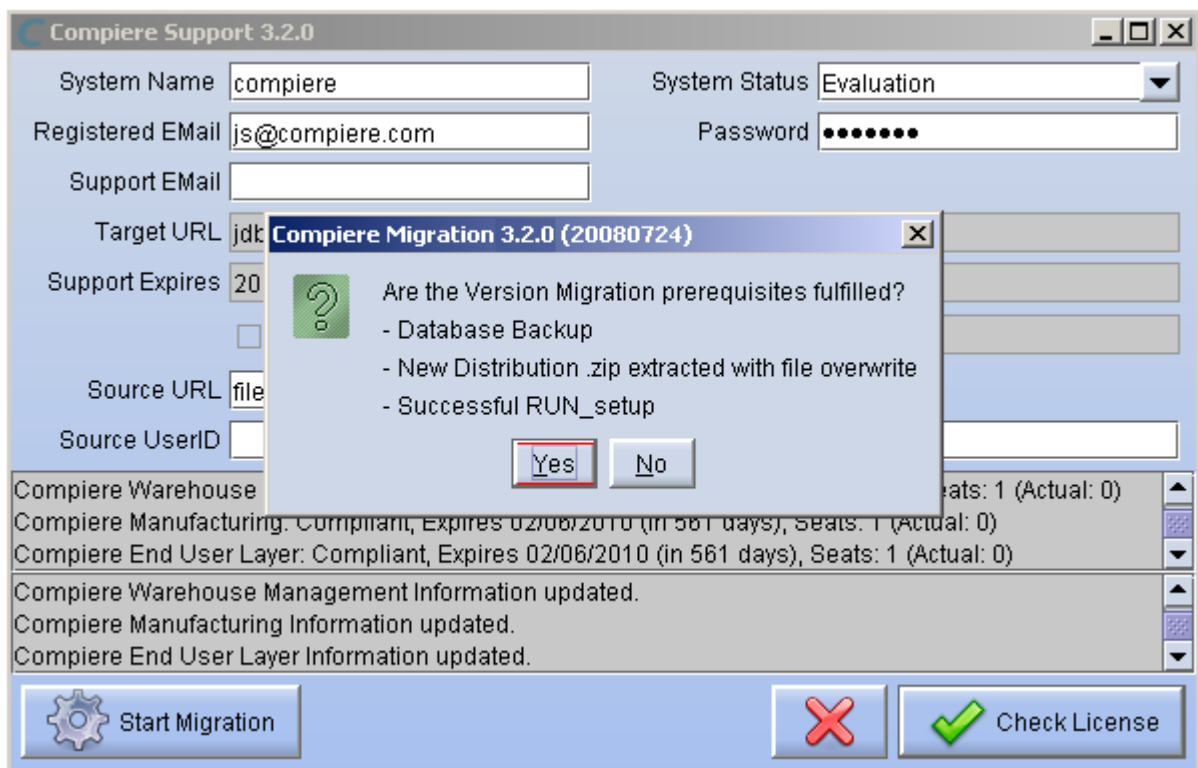
Compiere End User Layer Information updated.

Start Migration

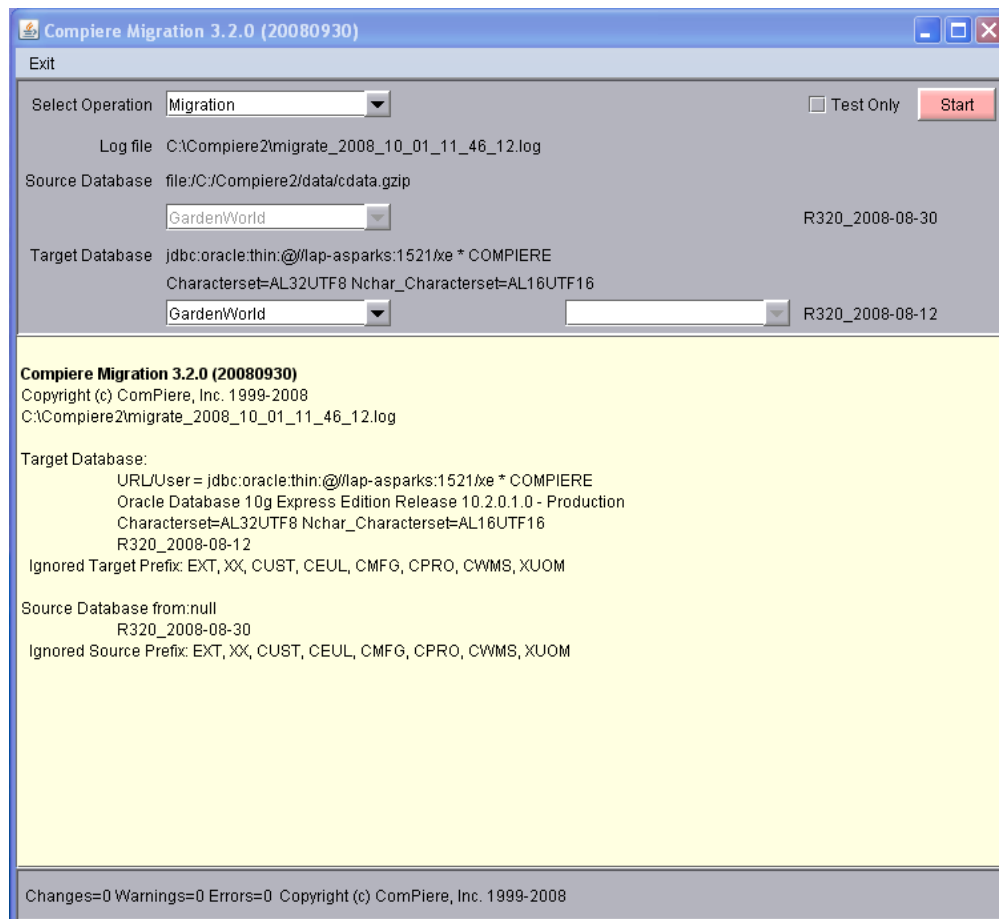
Cancel

Check License

15) At the Compiere Version Migration Prompt, click “Yes” to proceed with the Migration.

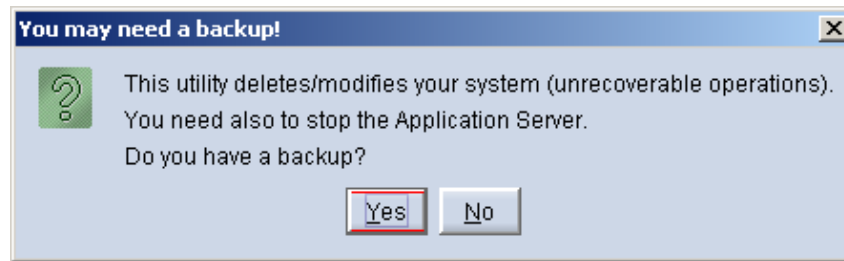


16) Unselect the “Test Only” option, and click Start.

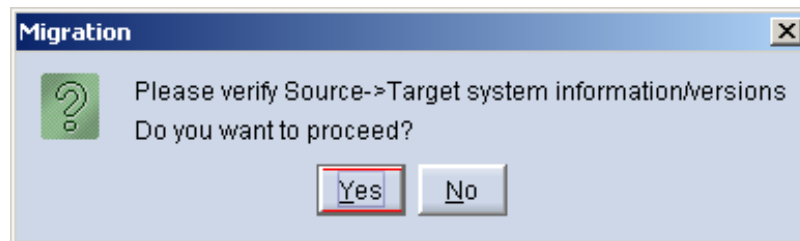




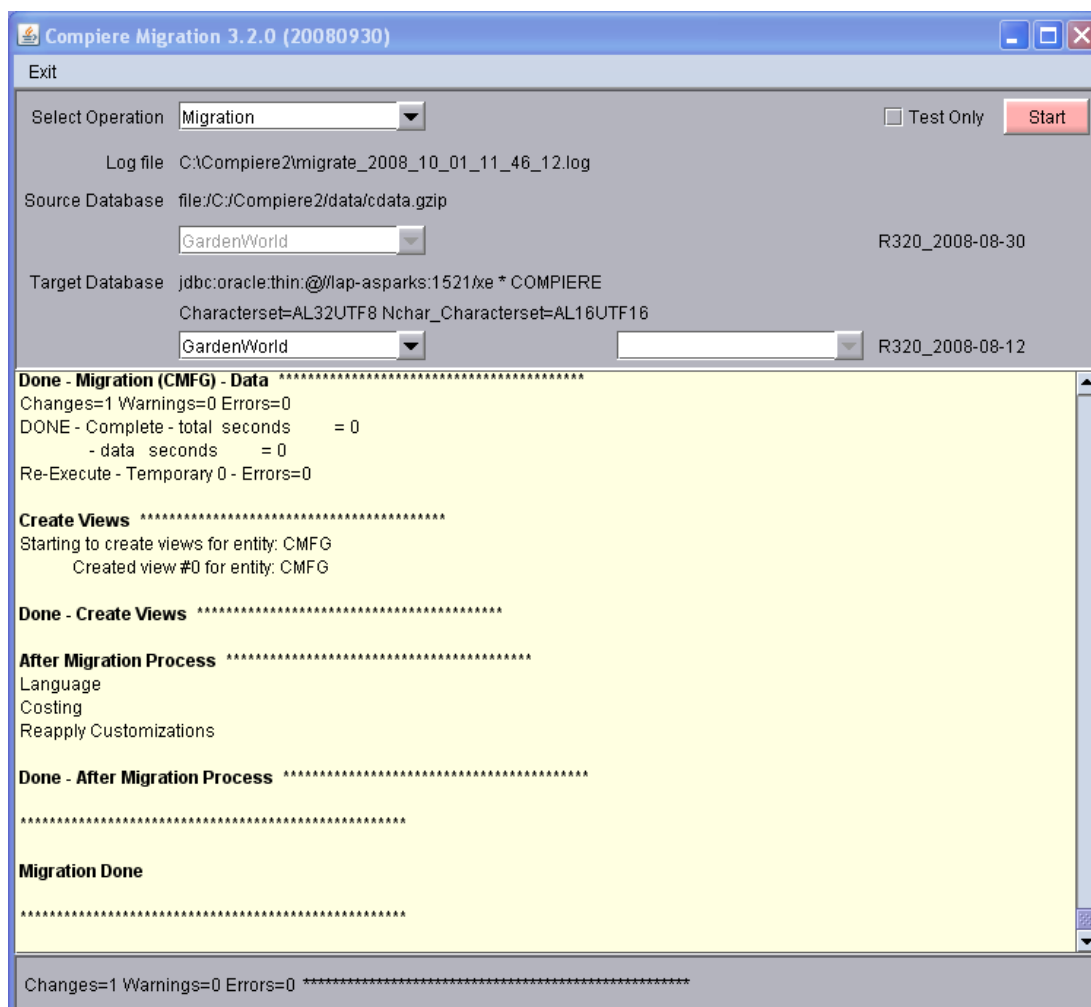
- 17) Confirm that you have a current back up of your database



- 18) Confirm that the Source and Target database versions from the Compiere Version Migration window are correct.



- 19) Verify that the migration finish with no errors and the message “**After Migration - DONE**” is displayed. In case you get any errors, please be sure to review the list of known issues listed in this document before logging a service request.



20) Verify the following log files for errors:

- a. migrate\_2010\_mm\_dd\_hh\_mi\_ss.log: complete log
- b. migrate\_2010\_mm\_dd\_hh\_mi\_ss.err.log: subset of log with just errors
- c. 2010-mm-dd\_#.log: possible additional errors not printed to the migration log. (search for the file with the text "Compiere Migration 3.6")

21) If you have a Compiere Professional or Enterprise Edition license, execute **utils/RUN\_Support** and click "Check License" to activate your license.

**Tip:** There is no need to click the start migration button.

22) After you have pressed the Check License button you should be able to see if your Professional License has been activated.

23) After Compiere Professional license has been updated you may click the "X" to close the window.

---

**Hint:** It is NOT necessary to click the Start Migration at this point.

- 24) Start the Apps Server using the script `utils/RUN_Server2`
- 25) To start Compieri in the Web UI after migration, it is required that all Web UI users clear their browser cache first.

## Multi-Server Installation

## Compieri Enterprise Edition

On a multi-server installation, after upgrading the main application server and database you need to run the following on the additional application servers that are used to load balance the web UI connections:

- 1) Unzip the binary distribution to update the Compieri2 folder
- 2) Copy the template for the configuration file  
`Compieri2/Utils/CommandLine/CLConfigurationTemplate.sh/bat`  
To  
`Compieri2/Utils/CommandLine/CLConfiguration.sh/bat`  
and configure it so the Apps Server is the local server where you are doing this installation, but the database server is the box where you already installed Compieri
- 3) Execute the following script to run only the file installation  
`cd Compieri2/Utils/CommandLine`  
`CLFileInstall CLConfiguration.sh`

**IMPORTANT:** Be sure to use the `CLFileInstall` script. If you use `CLInstall` it will drop your database user

- 4) Delete the files `COMPIERE_HOME/jboss/server/compieri/deploy/compieriRoot.ear` to ensure that there won't be conflicts by having multiple accounting, request, etc. processors
- 5) Start the apps server
- 6) Configure your load balancing solution to distribute part the load to the additional servers. Be sure to use sticky sessions to ensure that all requests from a session go to the same application server.

Support for this feature is only available for customers using Enterprise Edition. For more details about the different [Compieri Editions](#) please see our website.

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**Note:** After migration, (re-) apply the language packs when needed.

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## Post Migration Steps for RMA/RTV

This step is only relevant if you plan to use the new returns functionality and you are **migrating from 2.6.3 or older**.

Compiere now has explicit return transactions. We discontinued the previously seeded "Return Material" functionality.

In the "Document Type" window you need to do the following for every Tenant/Client:

1) Delete or de-activate the document types

- Return Material
- MM Customer Return  
*Hint:* This is discontinued functionality

If you choose to deactivate the obsolete document types (as opposed to deleting them), please rename the document type 'MM Customer Return' to an alternate name (For eg., ' \*\*\* MM Customer Return \*\* Do Not Use \*\*') so you can successfully create the new document types detailed below.

2) Create Return Document Types

- MM Vendor Return
  - Copy "MM Receipt" and set Name
  - Select Return Transaction
  - De-Select Counter Document flags
  - Optionally select Confirmations
- Vendor RMA
  - Copy "Purchase Order" and set Name
  - Select Return Transaction
  - De-Select Counter Document flags
- MM Customer Return
  - Copy "MM Shipment" and set Name
  - Select Return Transaction
  - De-Select Counter Document flags
  - Optionally create a special Document Sequence and or Confirmations
- Customer RMA (Copy Standard Order
  - Copy "Standard Order" and set Name
  - Select Return Transaction
  - De-Select Counter Document flags
  - Select AR Credit Memo for Invoice Document Type
  - Select the created MM Customer Return for Shipment Document Type
  - Optionally create a special Document Sequence

Unfortunately, we cannot do the above steps automatically as this is configuration specific user data.

**Tip:** For an example of a set-up, please check GardenWorld in a fresh install or in a newly created Tenant.

---

## **Appendix B**

### Installation Instructions

---

## Compiere 3.6.2 Installation Instructions

This is for a new installation of Compiere. If you already have installed a previous version of Compiere, please refer to the Migration instructions.

### Prerequisites

- Database Oracle XE, Oracle 10gR2, Oracle 11g or EnterpriseDB Postgres Plus Advanced Server 8.3.  
**Important:** It is mandatory to use a Unicode character set
- Database approved Linux Operating System, Windows 2003, 2008, XP or 7
- Disk Space: > 5 GB (includes database)
- Swap Space: > 1GB
- Memory: > 512 MB - Recommended: > 1 GB
- TCP/IP connection
- Network setup with DNS server and a domain.  
**Tip:** Do not use IP addresses.
- Internet access

**Hint:** Notice that the screenshots in this document refer to the installation on Windows, but the process is the same for Linux, except for the paths (e.g. C:\Compiere2 vs. /Compiere2) and the extension of the scripts (.bat vs. .sh)

### Database Installation

Install Database – For the instructions on how to install Oracle XE and EnterpriseDB on Windows and Linux please use the install guide on the Compiere website <http://www.compiere.org/support/installation.php>.

If you are using Oracle XE you need to modify the following database parameters:

- Start SQL\*Plus (Start => Programs => Oracle Database 10g Express Edition => Run SQL Command Line)
- connect system/xxxx
- alter system set processes=100 scope=spfile;
- Re-start the database (Start => Programs => Oracle Database 10g Express Edition => Stop DB & then Start DB)

### Java Installation

1. Download and install [Sun Java JDK 6](#) (SDK), update 5 or higher.  
**Important:** The Compiere Server requires the JDK (not just JRE).
2. For installation instructions see the JDK section on this page: <http://java.sun.com/javase/6/webnotes/install/index.html>

### Compiere Installation

3. Install /Setup Compiere Server (this includes the Client as well)
  - 1) Download the current version of Compiere: [Web Store](#) (for current customers) or free [Community Edition and Professional Trials](#) .
  - 2) Extract the .zip file. The steps shown assume that you extract to the root directory, resulting in a COMPIERE\_HOME of C:\Compiere2 in Windows or /Compiere2 in Linux.
  - 3) Set the JAVA\_HOME system variable to the location of your java JDK installation (e.g., 'C:\Program Files\Java\jdk1.6.0\_05') and add JAVA\_HOME/bin to the PATH  
  
To update the JAVA\_HOME in Windows, right click on My Computer and choose Properties. Then move to the advanced tab and click on Environment Variables. Find the JAVA\_HOME variable and click Edit.
  - 4) Verify that the bin directory for your database executables is included in the PATH. Also, if using Oracle XE on Linux, run \$ORACLE\_HOME/bin/oracle\_env.sh.

To update the PATH in Windows, right click on My Computer and choose Properties. Then move to the advanced tab and click on Environment Variables. Find the PATH variable and click Edit.

- 
- 5) Set the COMPIERE\_HOME system variable to the path of your Compiere installation (e.g., 'C:\Compiere2')
  - 6) Execute the script \$COMPIERE\_HOME/RUN\_Setup.

**Note:** Compiere requires Internet connection for installation. If you are using a proxy server then you need to modify the script Compiere2/RUN\_setup to set your proxy options.

- 7) Select Database Type Oracle XE, Oracle (for Standard or Enterprise Editions) or PostgreSQL (for EnterpriseDB).
- 8) For System Password, enter the System database User password (e.g. manager)
- 9) For Database Password, enter the Compire database user password, (e.g. 'compiere')
- 10) For Server Names, i.e., Application, Database and Mail, use the DNS name of the server. **Hint:** Do not use localhost (127.0.0.1) or IP addresses.

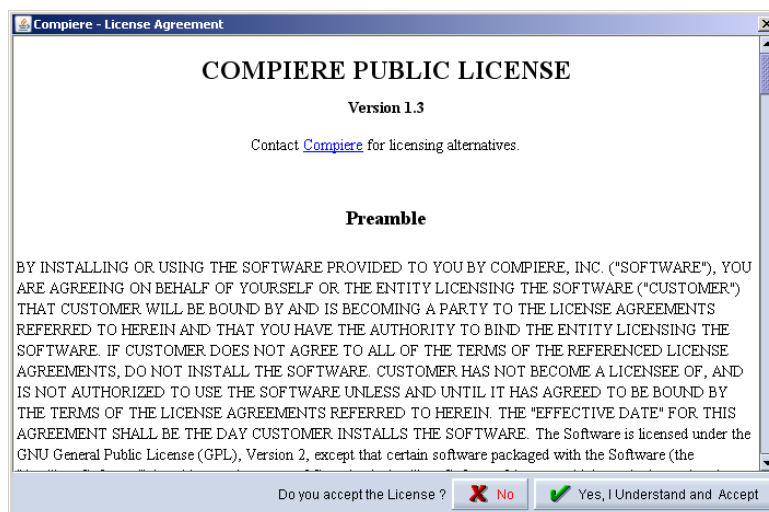
The screenshot shows the 'Compiere Server Setup - Release 3.2.0\_Beta' window. It has a menu bar with 'File' and 'Help'. The configuration fields are organized into sections: Java (Java Home, Java VM), Compire (Compire Home, KeyStore Password), Application Server (Application Server, Deployment, Web Port, Server Type, JNP Port, SSL), Database Server (Database Server, Database Name, Database Port, Database User, Database Type, Database Search, System Password, Database Password), and Mail Server (Mail Server, Mail User, Admin Email, Mail Password). The 'Test' button, located at the bottom left, is highlighted with a red box.

- 11) Enter or update any other parameters as necessary.
- 12) Select the Help button, for information on any field.
- 13) Select the Test button to check the parameters.  
**Tip:** The parameters will only save after they have been verified.
- 14) If an entry is unverifiable, it will display with a red X. Correct the entry and re-select Test.
- 15) Once all fields are verified, click the Save button to proceed.

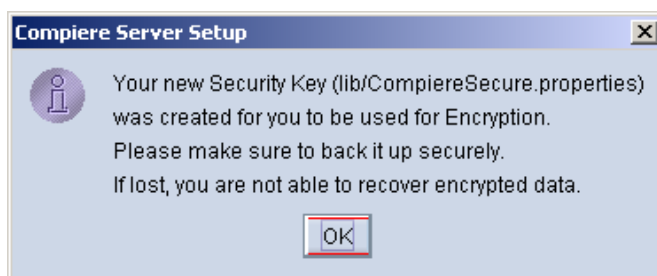
This screenshot shows the same 'Compiere Server Setup' window after verification. Each configuration field now has a small green checkmark icon next to it, indicating that all parameters have been successfully verified. The 'Test' button remains highlighted with a red box.



- 16) The Compiere Public License Opens. Click “Yes, I understand and Accept” to continue.



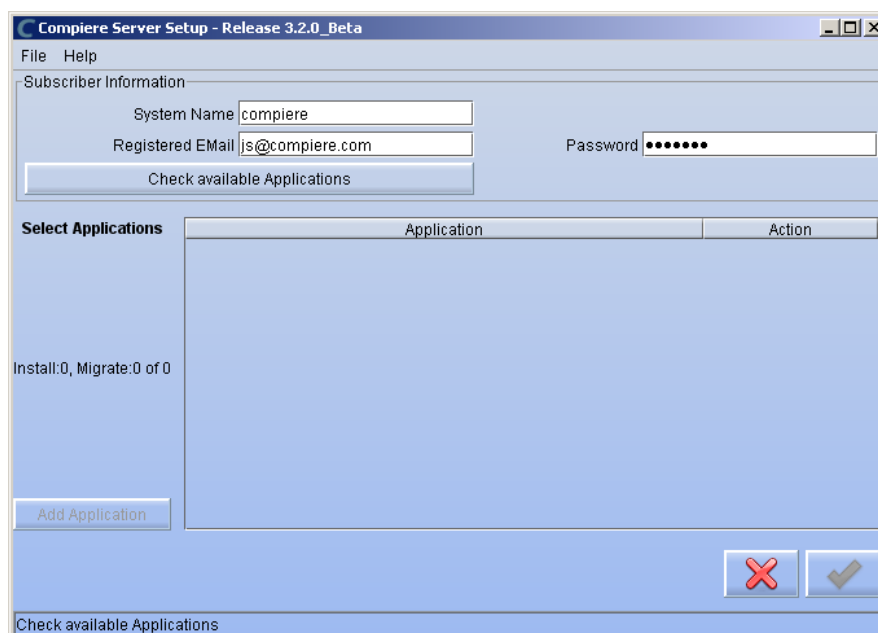
- 17) The following prompt will display describing your new Security Key. Click 'Ok' to continue.



- 18) The Next step is to provide the Subscriber Information. Current customers should provide the subscriber information (System Name, Email and Password) exactly as it was registered in the Compiere Web Store to get a complete list of applications.

Click Check Available Applications to get a list of applications that are available to be installed.

**Tip:** Community Edition users may leave the fields blank and click “Check available components” to install the Community Edition.



- 19) Select the applications that you would like to install. You can include additional applications by using the button Add Application.

By default all available applications will be installed. If you do not wish to install one of them you should change the action field from “New Install” to “-None-“. Notice that Compiere Core is a *Mandatory Prerequisite* and must be selected.

Select the OK button to continue

**Compiere Server Setup - Release 3.2.0\_Beta**

File Help

Subscriber Information

System Name: compiere

Registered Email: js@compiere.com

Password: .....

Check available Applications

**Select Applications**

Application	Action
Compiere Standard 3.2.0 (Requires accepting License)	Reinstall/Migrate ▼
Compiere End User Layer 3.2.0 (Requires accepting License)	Reinstall/Migrate ▼
Compiere Manufacturing 3.2.0 (Requires accepting License)	Reinstall/Migrate ▼
Compiere Professional 3.2.0 (Requires accepting License)	Reinstall/Migrate ▼
Compiere Warehouse Management 3.2.0 (Requires accepting License)	Reinstall/Migrate ▼
Extended Units of Measure 1.0	Reinstall/Migrate ▼

Install: 6, Migrate: 6 of 6

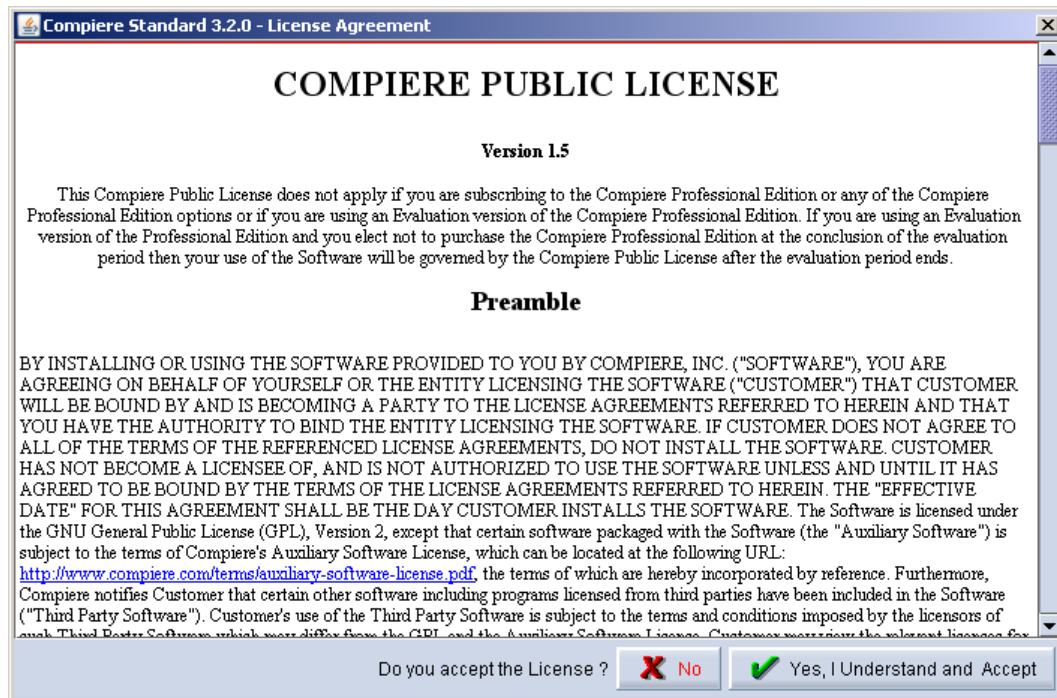
Add Application

✖ ✔

Select Applications

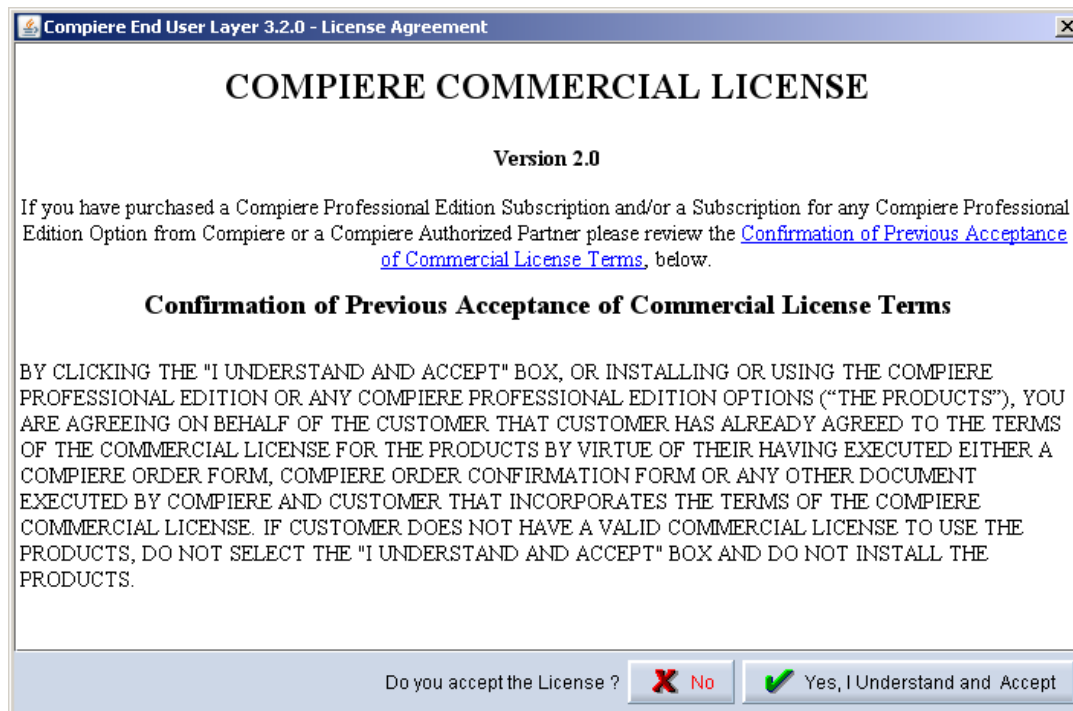
**IMPORTANT:** If you don't provide the correct email/password or if you don't have Internet connection you won't be able to select Compiere Professional or any of the other optional components

- 20) Next, read and accept the Compiere Public License agreement.  
**Hint:** You might get more than one license agreement, depending on the applications that you are installing.

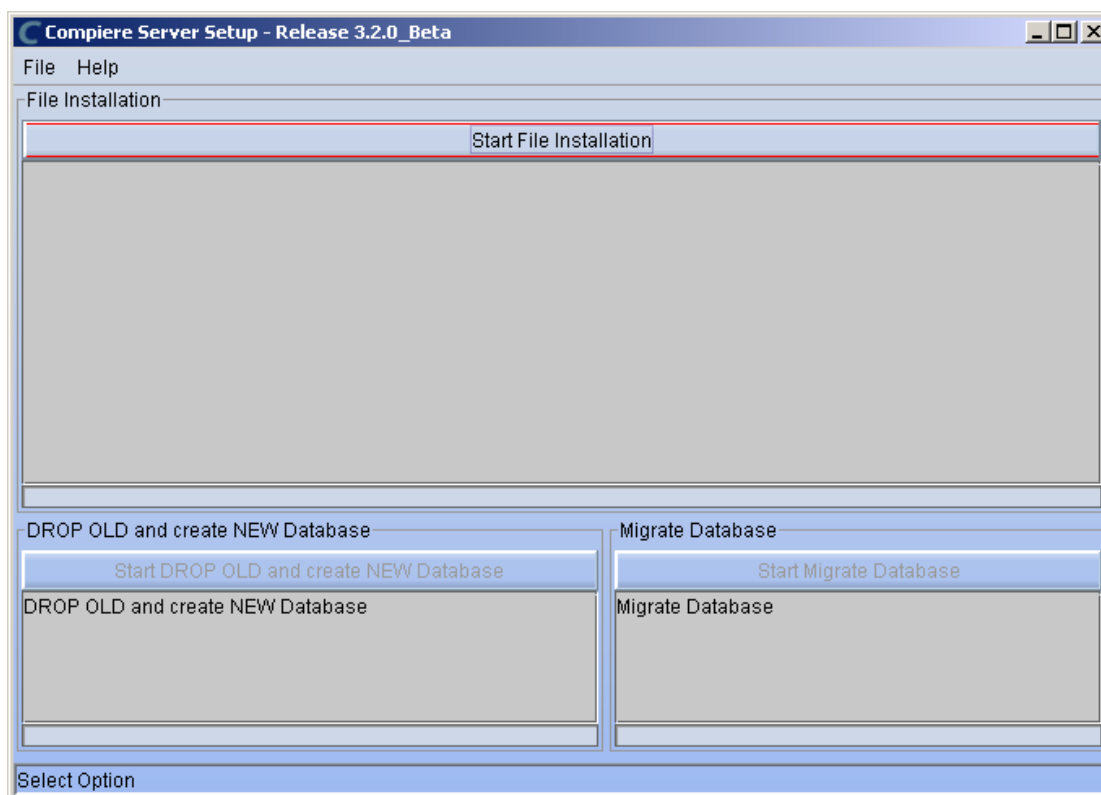


- 21) Then read and accept the Compiere Commercial License agreement.

**Hint:** You might get more than one license agreement, depending on the applications that you are installing.



22) After accepting the license agreement the following window will display:

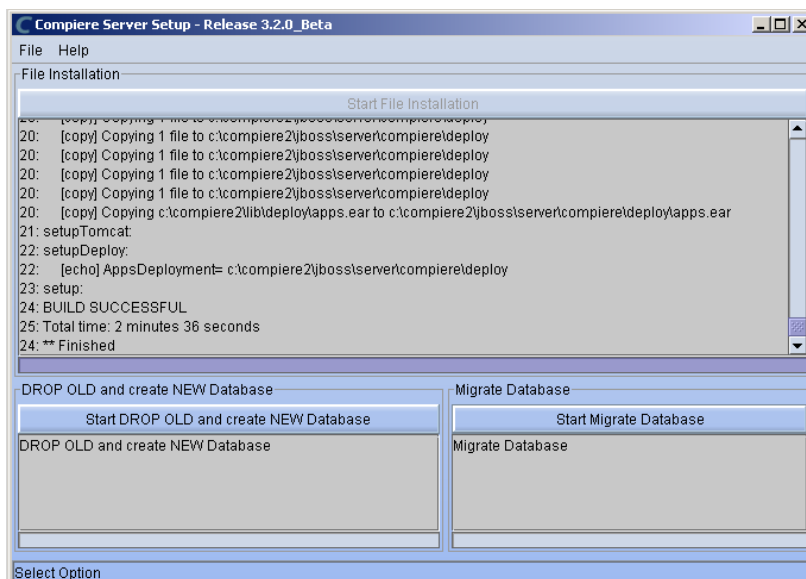


23) Select Start File Installation.

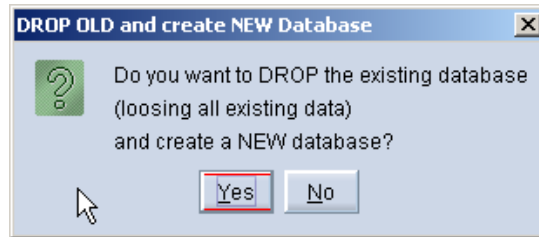
**Important:** At this point, you must be connected to the internet to continue or the installation will not succeed.

24) Once the file installation is complete, select Start Create New Database.

**Note:** If you already have a Compiere database in your system, you will be presented with a split panel after 'Start Server Install'. Click the left panel (Start DROP OLD and create NEW Database) if you want to replace the existing database with the new database.

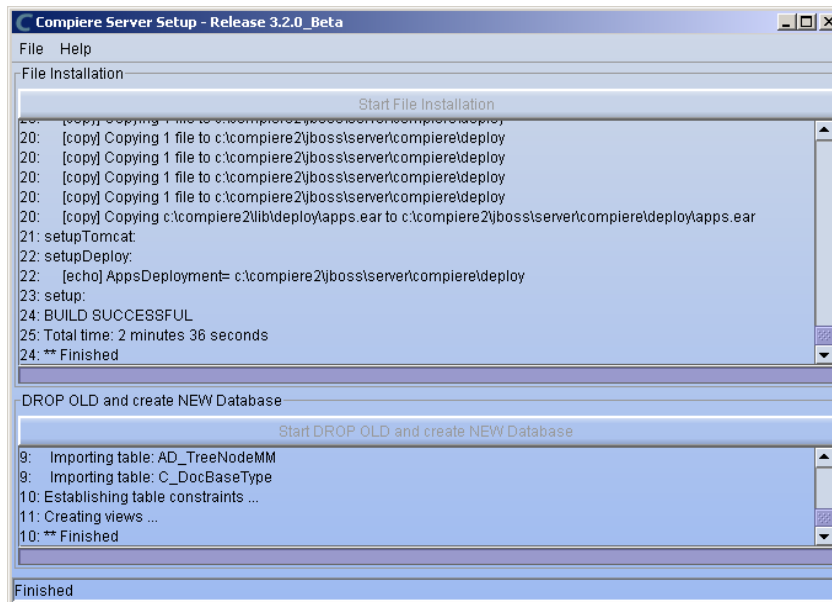


25) At the prompt select 'Yes' to Drop the existing Database and create a new database.



**Warning:** If you choose to replace the existing database, all data in the existing database will be removed.

- 26) Verify that you see a '10: \*\* Finished' message at the end of this step. Then a new window should pop-up to do the license validation.



- 27) The Compiere Support window opens. Complete the necessary fields in order to validate your assets.

**Hint:** If you only intend to use the Community Edition of Compiere 3.0, you may skip the following steps and go to the Application Server section.

**Important:** For customers with a valid support contract with Compiere, this is a required step to ensure that the features associated with the support level are enabled. If you are a customer and do not have a web store login, please contact your system administrator or Compiere Support first. If you are not a customer and would like to obtain a trial license for the Professional Edition, please [Contact Us](#).

- 28) Provide the following information exactly as it was registered in the Compiere Web store and click Check License to validate your asset information.

- System Name (name provided in the web store registration)
- Registered Email (email address provided in the web store registration)
- Password (web store password)

29) To verify your license, click the “Check License” button.

**Tip:** Do not click Start Migration.

Notice that internet access is required to validate the license information.

30) Next, review that your license information has been validated. If you have a trial license for Compiere Professional, but you currently don’t have a license with Compiere, you will see that the license for Standard is invalid. This is expected as the trial doesn’t include Standard and you may ignore the error.

31) After Compiere Professional license has been verified, click the “X” to close the window.

**Note:** If you get the error “You do not have an appropriate license to use this feature” when starting the web UI, then login to the server and execute `utils/RUN_Support` to validate again your license and restart the application server. When using the Swing client, ensure that your database connection information matches exactly the information in the

---

target URL in RUN\_Support (including the fully qualified server name)

---

32) Close any additional Setup and /or Support windows.

## Run Application Server

### 4. Start the Compiere Application Server

- 1) Execute `utils/RUN_Server2`.
- 2) There should be no errors. Check the logs in `$COMPIERE_HOME/jboss/server/compiere/log` to verify this.
- 3) Common problems include ports already in use:
  - 17:41:09,085 ERROR [NamingService] Could not start on port 1099  
java.net.BindException: Address already in use:  
JVM\_Bind at java.net.PlainSocketImpl.socketBind(Native Method)
  - There is another program using port 1099; Stop it and restart `Run_Server2`  
or setup Compiere to use another port in `RUN_setup`.

Likely port conflicts:

- 80 - Other web server running (or you need privileges under Linux/Unix)
- 8080 – Used by Oracle Database
- 1099 - Often used by IDEs for debugging, or by internet messengers (Skype, Gtalk, etc.)

## Start Compiere

### 5. Start the Compiere Client.

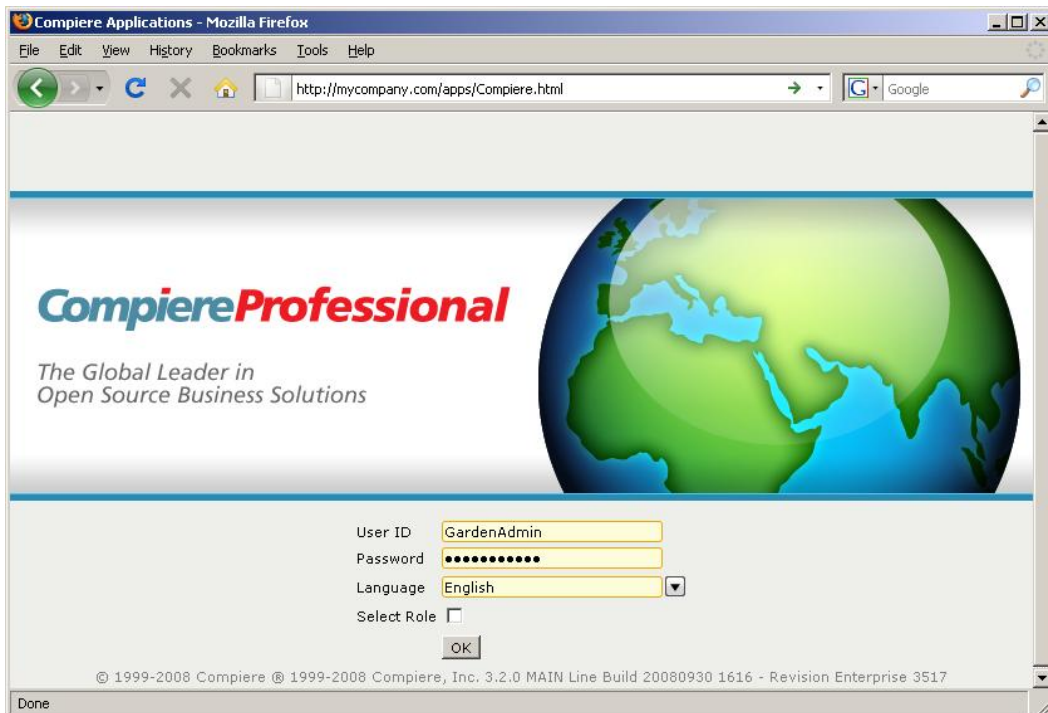
- 1) Start the Swing client by double clicking on the Compiere shortcut in your desktop or by executing **RUN\_Compiere2** from the \$COMPIERE\_HOME directory.

Default users and passwords for the sample Garden World application:

- |                           |                    |
|---------------------------|--------------------|
| - GardenUser/GardenUser   | - System/System    |
| - GardenAdmin/GardenAdmin | - SuperUser/System |



- 2) Alternatively, if you have access to the Professional Edition, you can launch the application from the browser by using the URL: <http://server:port/apps>, (e.g. <http://mycompany.com:80/apps>.)  
**Tip:** For optimal performance, the Firefox browser is recommended for using the Compiere Web User Interface.



**Information:** For additional information see the Compiere home page <http://www.compiere.com>.



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## **Appendix C**

### Application Extensions

## Application Extensions - Compiere Partners

This section is for Application Extensions in Compiere available as functionality for Partners only. This framework will allow Partners to create application extensions that include both reference data and code, and can be distributed to their customers through Compiere.

### Registration of Application Extensions – Application Provider (Partner)

Use the steps below to register for Application Extensions:

- 1) To register an Application Extension, log a Support Request with Compiere.
- 2) Login with the System Administrator role.
- 3) Open the Entity Type window (Application Dictionary => Entity Type) and create a new record.

Entity Type SuperUser@\*.System [lap-fr{lap-fr-xe#compierecore}]

File Edit View Go Tools Help

Entity Type: Tenant System Organization \*

Entity Type: fr1 ☐ Registered

Name: Test fr1

Description: Test application extensions

Comment: Full description of the application extension

☒ Active

Version: 1.0

Prerequisite Version: 3.0.3 Prerequisite Applications: CPRO

Classpath

ModelPackage

Model Validation Classes

License Text

Documentation Text

Register Application

Inserted +\*7/9

**Hint:** Be careful not to modify the entities C, D, CPRO or XUOM.

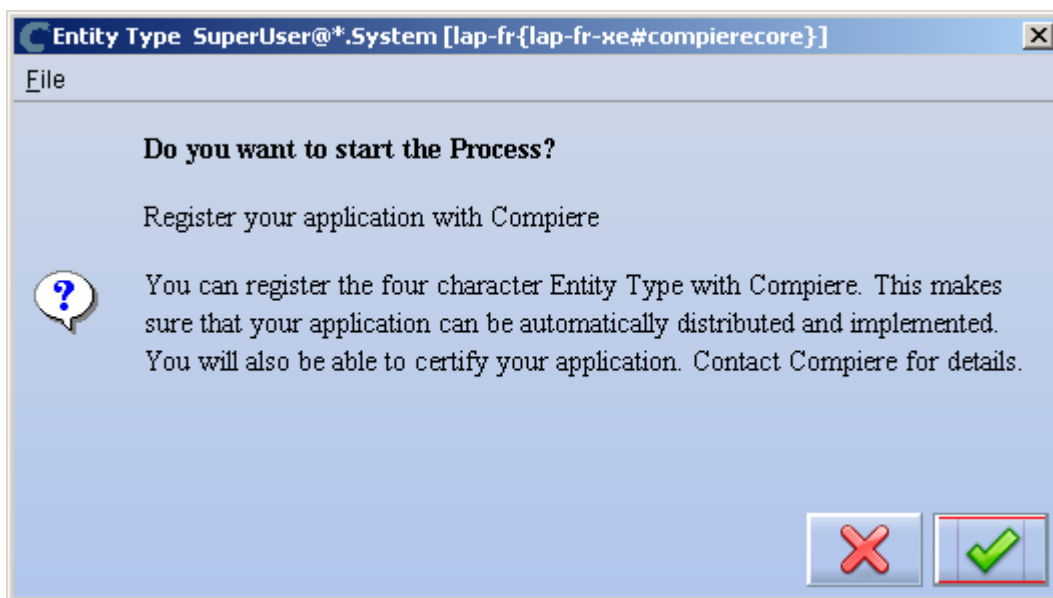
**Important:** Complete all the mandatory fields. For entity type, notice that names beginning with “C” and “X” are reserved for Compiere and you must use four characters.

Comments about optional fields:

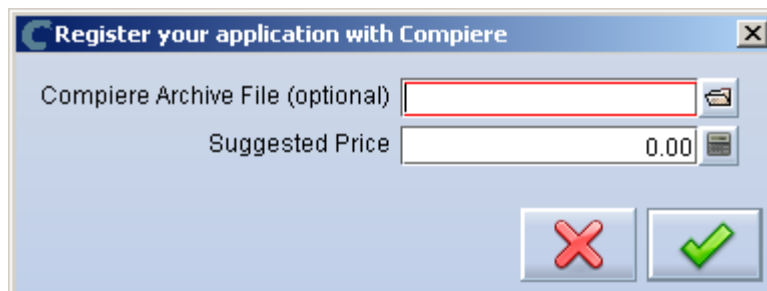
- Version: The version of your extension. Usually 1.0 for the first version.
  - Prerequisite version: The Compiere Core version that is required for this extension, e.g. 3.3.0. You need to use the exact text as defined for the entity type D.
  - Prerequisite applications: The entity type of the applications that need to be installed in order to install this extension. For example, set it to CPRO if the extension must be applied on top of the professional edition.
  - Classpath: List of additional jar files required for this extension.
  - Model package: Specific model package from the jar files listed in the classpath field.
- 4) You do not need to enter any information on the Version, Modification, or Migration Step tabs.
  - 5) Ensure that your System window contains your up to date information for your system and web store email/password information.
  - 6) Click "Register Application" to send your request to Compiere.

**Tip:** If an entity type with the same name has already been registered you'll get an error "Error: Already registered: XXXX". You will have to create a new record with the new entity type. Verify with Compiere that the new entity type that you plan to use is available.

- 7) Click 'Ok' to start process.



- 8) Leave the defaults in place and click 'Ok' to continue.



- 9) At this point the status will be pending approval from Compiere. Please log a support request in our case management system requesting the approval of your component including a long description and license type.

## Creation of Application .car file – Application Provider (Partner)

Follow the steps below to create the Application.car file:

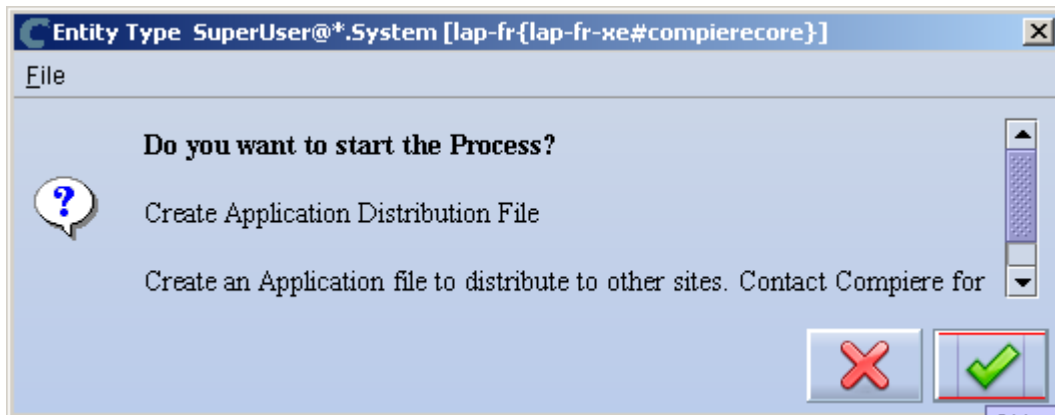
- 1) Make all the application dictionary changes using the entity type that you registered in the previous step.
- 2) Generate jar files for the custom code required by your extension.
- 3) After having your new Entity Type approved by Compiere; login to Compiere with the System Administrator role and query the entity type that you registered in the previous step and click “Create Application File.”

The screenshot shows the 'Entity Type' configuration window in Compiere. The window title is 'Entity Type SuperUser@\*.System [lap-fr-{lap-fr-xe#compierecore}]'. The left sidebar has tabs for 'Entity Type', 'Version', 'Modification', and 'Migration Step'. The main area contains the following fields and controls:

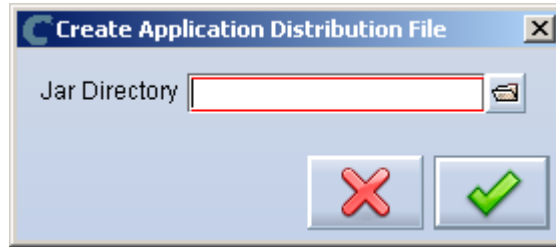
- Tenant: System
- Organization: \*
- Entity Type: LFR1 (with a checked 'Registered' checkbox)
- Name: Test fr1
- Description: Test application extensions
- Comment: Full description of the application extension
- Active: ☒ Active
- Version: 1.0
- Prerequisite Version: 3.0.3
- Prerequisite Applications: CPRO
- Classpath: lfr1\_code.jar
- ModelPackage: (empty)
- Model Validation Classes: (empty)
- License Text: (empty)
- Documentation Text: (empty)

At the bottom, there are two buttons: 'Register Application' and 'Create Application File'. The status bar at the bottom left says 'Record saved' and the bottom right shows '7/9'.

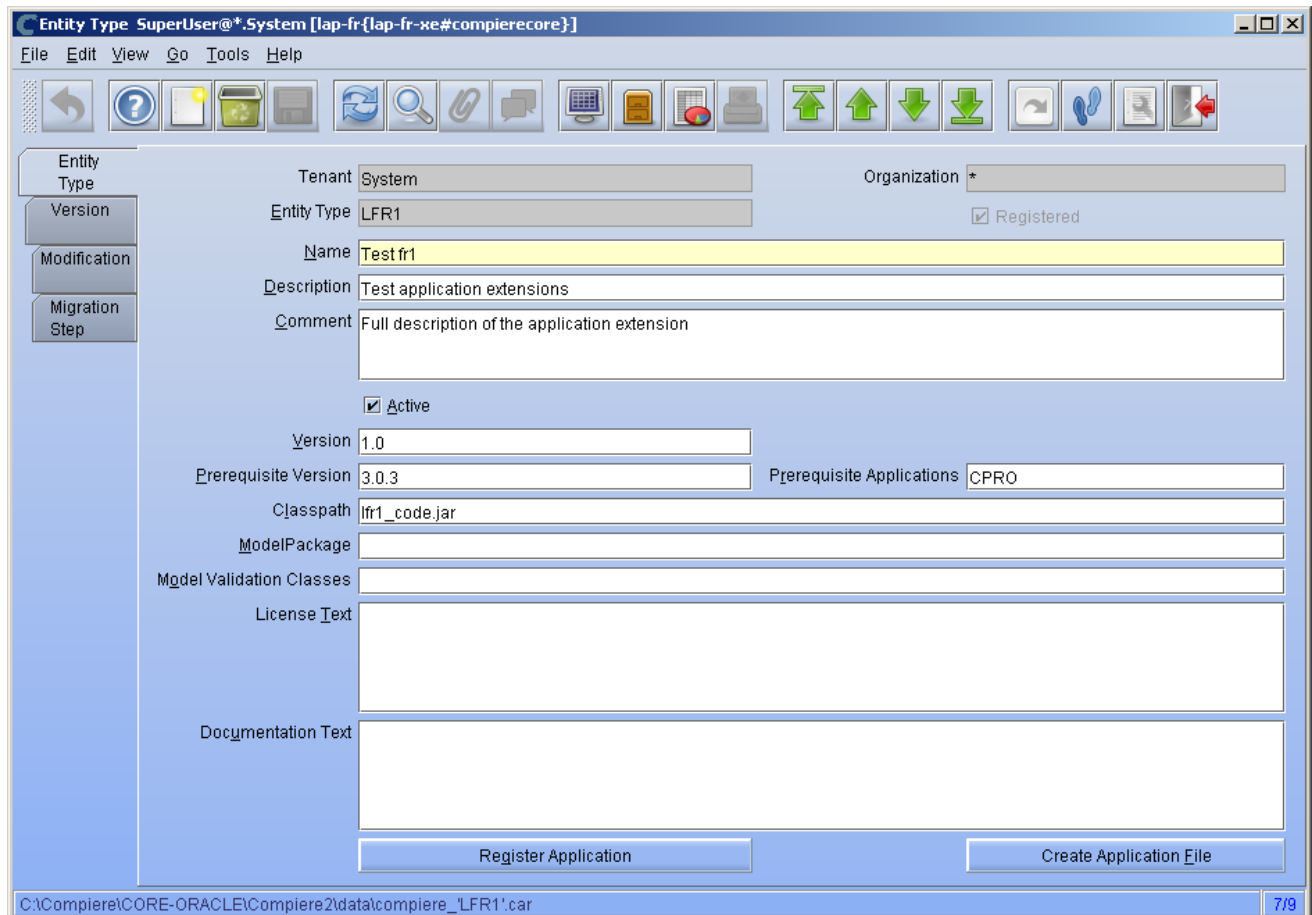
- 4) Click 'Ok' to start process.



- 5) Provide the directory for the jar file listed in the field classpath.



- 6) The car file will be generated in the COMPIERE\_HOME/data directory. The newly generated .car file will have a name of compiere\_XXXX.car.



**Important:** The naming convention for .car files has changed, (e.g. compiere\_'CPRO'.car from 3.0 and 3.1 is now compiere\_CPRO.car in 3.3, i.e. without quotes in the file name). If a customer unzips the Compiere installation files into the same directory, it is possible to end up with both compiere\_'CPRO'.car as well as compiere\_CPRO.car. This in turn will cause Compiere Professional to show up twice in the installation window. To avoid this situation, customers will need to manually delete compiere\_'CPRO'.car and compiere\_'XUOM'.car from COMPIERE\_HOME/data directory. These are the only two .car files that Compiere has distributed prior to 3.2. If a customer has created any additional .car files prior to 3.2, it is necessary to follow the same procedure for those .car files as well.

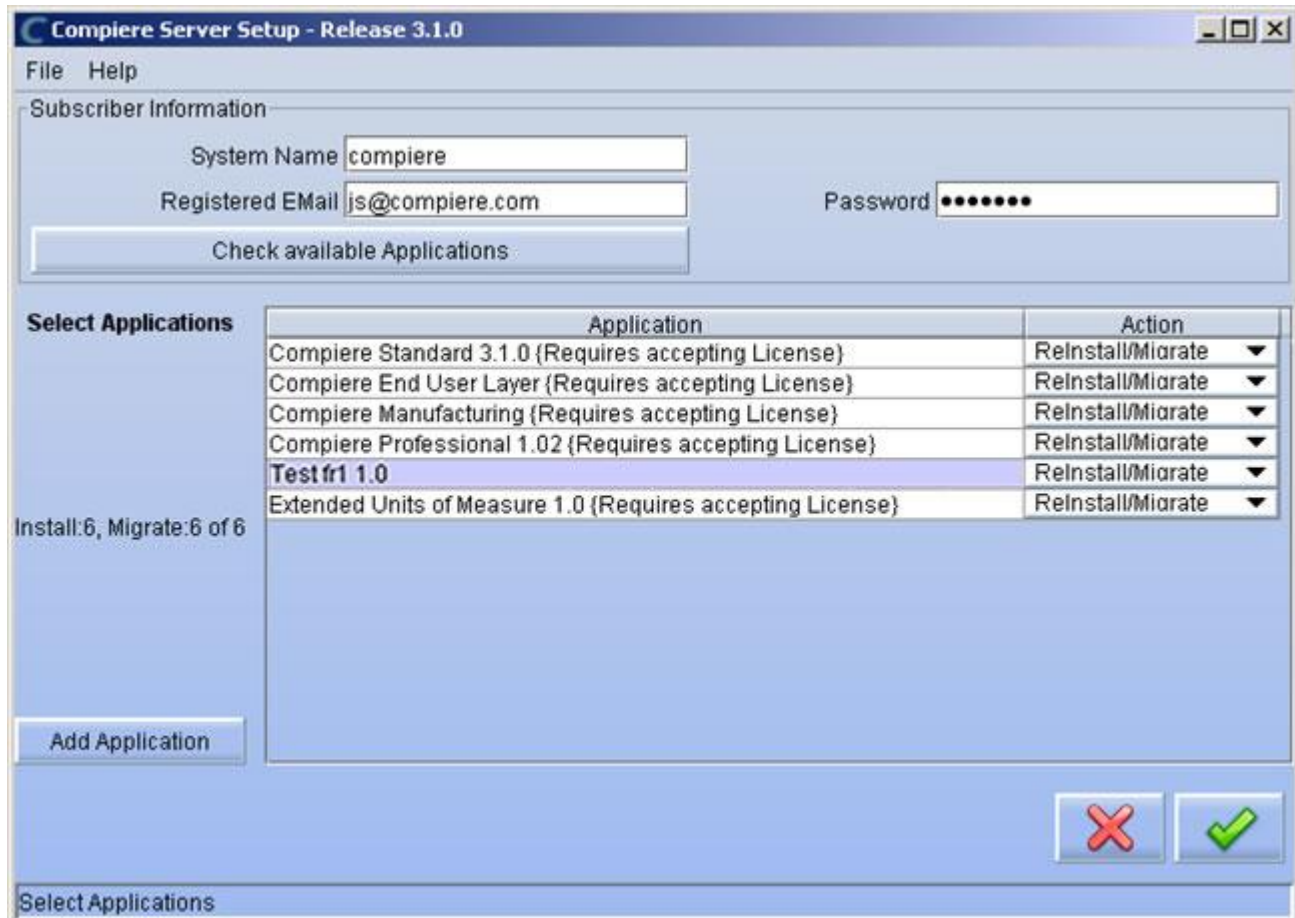
## Installation – Application Consumer (Customer)

Follow the steps below to install the Application:

- 1) After obtaining the car file for the application extension, copy it to the directory COMPIERE\_HOME/data.
- 2) Execute RUN\_Setup (see Appendix A for details on the setup information.)

**Important:** Be sure to have internet connection available to be able to get the license terms for the application extensions that you plan to install.

- 3) When you get to the window to select the applications, besides the application extension that you need to install, also select the option Reinstall/Migrate for Compiere Core 3.3.



- 4) Then continue with the MIGRATION steps as usual. (See Appendix A for more details.)

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## **Appendix D**

### Command Line Scripts

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## Command Line Scripts

Scripts are provided in the \$COMPIERE\_HOME/utils/CommandLine directory for experienced Compiere users who would like to perform Compiere instance creation and maintenance via command line or using automated scripts.

### CLInstall

Purpose: To create a new Compiere installation. When this script is run a new Compiere instance is created on the database specified via configuration file. Please note that existing Compiere database instance is dropped and a fresh new Compiere instance is created when this script is run.

The script validates the components that can be installed against Compiere License server and hence need to be connected to internet while running and have the appropriate license to allow you to install the components. The script also updates the License information after the instance is created.

All the component .car files present in \$COMPIERE\_HOME/data will be installed as long as you provide the correct subscriber information, otherwise only the standard application will be installed.

1) Environment Variables \$COMPIERE\_HOME, \$JAVA\_HOME need to be set.

2) The configuration parameters to CLInstall are provided via a configuration file. A template CLConfigurationTemplate is provided in the same directory, which you can make a copy and edit the configuration parameters for your specific installation. All the parameters have one to one correspondence with the parameters on the first window that comes up when running RUN\_setup

Subscriber information for License validation: CL\_SYSTEM\_NAME, CL\_WEBSTORE\_EMAIL, CL\_WEBSTORE\_PASS

Homes: CL\_COMPIERE\_HOME, CL\_JAVA\_HOME, CL\_JAVA\_TYPE

Database: CL\_COMPIERE\_DB\_TYPE, CL\_COMPIERE\_DB\_SERVER, CL\_COMPIERE\_DB\_PORT,  
CL\_COMPIERE\_DB\_NAME, CL\_COMPIERE\_DB\_SYSTEM, CL\_COMPIERE\_DB\_USER,  
CL\_COMPIERE\_DB\_PASSWORD

Apps Server: CL\_COMPIERE\_APPS\_TYPE, CL\_COMPIERE\_APPS\_SERVER, CL\_APPS\_SERVER\_DEPLOY\_DIR,  
CL\_COMPIERE\_JNP\_PORT, CL\_COMPIERE\_WEB\_PORT

SSL Settings: CL\_COMPIERE\_SSL\_PORT, CL\_COMPIERE\_KEYSTOREPASS

Mail: CL\_MAIL\_SERVER, CL\_ADMIN\_EMAIL, CL\_MAIL\_USER, CL\_MAIL\_PASSWORD

3) Running:

CLInstall takes in the configuration file as a parameter.

Sample Usage: >CLInstall.bat CLConfiguration.bat

Errors while running the script are displayed onto the console window and are also written to log files within the same directory.

### CLMigrate

This is very similar to CLInstall.bat except that it performs the migration of a Compiere instance instead of dropping and recreating a new instance.

### CLUpdateLicense

This script can be run to update the license information instead of executing RUN\_Support. The script can be only run in a successful Compiere installation created via RUN\_Setup or installation/migration via command line. The script can be edited to provide different subscriber information for license validation.



---

The following line in CLUpdateLicense.bat

```
"%COMPIERE_JAVA%" %COMPIERE_JAVA_OPTIONS% -cp %CLASSPATH% com.compiere.client.UpdateLicense
```

can be changed as follows to pass in the subscriber information

```
"%COMPIERE_JAVA%" %COMPIERE_JAVA_OPTIONS% -cp %CLASSPATH% com.compiere.client.UpdateLicense --  
sysname xxx --email xxx --password xxx
```

If the parameters are not specified, the subscriber information at the time of installation will be used to update the Licenses