

z/OS  
2.5

*Hardware Configuration Definition  
Planning*



**Note**

Before using this information and the product it supports, read the information in [“Notices” on page 119](#).

This edition applies to Version 2 Release 5 of z/OS® (5650-ZOS) and to all subsequent releases and modifications until otherwise indicated in new editions.

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## About this document

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This document describes how to define an I/O configuration using the Hardware Configuration Definition (HCD) element of z/OS. It includes information on planning an I/O configuration, and specifying the configuration at IPL or dynamically, for a running system.

## Who should use this document

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This document is intended for anyone who plans an installation's I/O configuration and creates and coordinates action plans to change an I/O configuration.

## How to use this document

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If you are using this information for the first time, you should read all of the sections. Later, you might refer only to the information you need for a specific task that you are performing.

This document contains the following sections:

- Chapter 1, “Introduction,” on page 1 presents an overview of I/O configuration tasks using HCD and dynamic configuration.
- Chapter 2, “Planning your I/O configuration definition,” on page 11 describes the decisions you must make when planning your I/O configuration.
- Chapter 3, “Specifying an I/O configuration at IPL,” on page 67 explains the steps for defining your I/O configuration at IPL-time.
- Chapter 4, “Dynamically changing an I/O configuration,” on page 77 explains the steps for changing your I/O configuration on a running system.

## z/OS information

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This information explains how z/OS references information in other documents and on the web.

When possible, this information uses cross document links that go directly to the topic in reference using shortened versions of the document title. For complete titles and order numbers of the documents for all products that are part of z/OS, see *z/OS Information Roadmap*.

To find the complete z/OS library, go to [IBM Documentation \(www.ibm.com/docs/en/zos\)](http://www.ibm.com/docs/en/zos).



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## Summary of changes

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This information includes terminology, maintenance, and editorial changes. Technical changes or additions to the text and illustrations for the current edition are indicated by a vertical line to the left of the change.

**Note:** IBM z/OS policy for the integration of service information into the z/OS product documentation library is documented on the z/OS Internet Library under [IBM z/OS Product Documentation Update Policy \(www-01.ibm.com/servers/resourceLink/svc00100.nsf/pages/ibm-zos-doc-update-policy?OpenDocument\)](http://www-01.ibm.com/servers/resourceLink/svc00100.nsf/pages/ibm-zos-doc-update-policy?OpenDocument).

## Summary of changes for Version 2 Release 5 (V2R5)

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The following content is new, changed, or no longer included in V2R5.

### New

The following content is new.

#### June 2022

The following topic is new: [“Hardware Activate performance considerations”](#) on page 99.

#### January 2022

- Added information about changing Lowest Level CSS, see [“Modifying Channel Path Access to a spanned Coupling Facility Channel Path”](#) on page 97.
- Added information about dynamically changing access to shared devices, see [“Dynamically changing Access to Shared devices CTC, FCP, IQD, OSD, OSM, OSN, or OSX”](#) on page 90.

#### November 2021

- Added an example for adding READ-ONLY devices. See [“Defining whether an I/O device is read-only”](#) on page 41.

#### September 2021

No new content was added in this release.

### Changed

The following content is changed.

#### May 2022

- An update was made to the note about aliases was added to [“Using SuperPAV mode”](#) on page 37 (APAR OA60891).

#### November 2021

- Updated the values for the high common storage that is allocated in the SQA/ESQA storage that is allocated for the new UCBs table. See [“Defining your initial I/O configuration”](#) on page 67.

#### September 2021

- An update was made to how to map CHPIDs across multiple logical channel subsystems in [“Defining processors, PCIe functions, logical channel subsystems, partitions and channel paths”](#) on page 15.
- Processor Complex B was updated in the diagram for shared channel paths. See [“Defining shared channel paths”](#) on page 24.
- The rules that should be observed for defining and configuring PCIe functions and corresponding channel IDs was updated in [“Defining PCIe based functions”](#) on page 33.

- A note and sample about aliases was added to [“Using SuperPAV mode”](#) on page 37.
- An update was made to the note in [“Migrating to subchannel sets”](#) on page 58.
- An update about installing a new processor that does not currently have an IOCDS was made in [“Defining your initial I/O configuration”](#) on page 67.
- An update was made to the Eligible device table (EDT) identifier in [“IODF statement in the LOADxx member”](#) on page 71.
- An update was made on when defining the partition on an IBM Z processor in [“Dynamically changing logical partitions to the I/O configuration”](#) on page 83.
- The figure for "Activate or Process Configuration Data" was updated, see [“Scenario 2 - Activating Hardware Changes Only”](#) on page 104.

## Deleted

The following content was deleted.

### September 2021

- Information about WLM service coefficients was removed from [“Workload manager and dynamic alias management”](#) on page 36.

## Summary of changes for z/OS Version 2 Release 4 (V2R4)

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The following changes are made for z/OS Version 2 Release 4 (V2R4).

### New

- A new topic has been added for the dynamic deletion of I/O hardware components. See [“Dynamic deletion of I/O hardware components”](#) on page 82.
- New information has been added for dynamically changing a partition definition. See [“Dynamically changing logical partitions to the I/O configuration”](#) on page 83.

### Changed

- Changes all instances of z processors to IBM Z processors.
- Updated the table for SQA/ESQA storage allocated for new UCBs. See [“Defining your initial I/O configuration”](#) on page 67.

### Deleted

- Removed all references to ESCON as it is no longer supported.

## Summary of changes for z/OS Version 2 Release 3 (V2R3)

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The following changes are made for z/OS Version 2 Release 3 (V2R3).

### New

- APAR update for activating dynamic change on a standalone coupling facility. See
  - [“What an I/O configuration is”](#) on page 1
  - [“Making a dynamic change using “Hardware Changes Only” on a Standalone Coupling Facility”](#) on page 9
  - Chapter 4, [“Dynamically changing an I/O configuration,”](#) on page 77
  - [“Dynamic I/O - Hardware Changes Only”](#) on page 100
- [“Using SuperPAV mode”](#) on page 37 has been added.



## **Changed**

- An update has been to the considerations for PPRC device pairs, used by Basic Hyperswap. See [“Defining a special secondary device \(3390D\)” on page 32.](#)

## **Deleted**

There is no deleted information in this version.



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# Chapter 1. Introduction

This topic describes the process of defining and selecting an I/O configuration through the Hardware Configuration Definition (HCD) element of z/OS. It also introduces the concept of *dynamic I/O configuration*, which is a means of selecting or changing the I/O configuration on a running system.

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## What an I/O configuration is

An I/O configuration is the set of hardware resources that are available to the operating system, and/or coupling facility, and the connections between these resources. Hardware resources typically include:

- Channels (all channel types including coupling links that connect between z/OS and a coupling facility)
- FICON directors (switches)
- Control units (currently known as logical control unit headers)
- I/O devices
- PCIe functions

When you define an I/O configuration, you provide both physical and logical information about these resources. For example, in defining a device you provide physical information, such as its type and model, and logical information, such as the identifier you will assign to the device. [Chapter 2, “Planning your I/O configuration definition,” on page 11](#) describes the information you need to provide for each resource.

With Hardware Configuration Definition (HCD), you perform the hardware and software I/O configuration processes through a single, interactive end-user interface. As you enter data, HCD performs validation checking to help avoid data entry errors before you attempt to use the I/O configuration. Additionally, HCD provides a discovery and I/O auto-configuration function for FICON attached disk and tape storage devices to add definitions about already existing I/O paths.

The output of HCD is an I/O definition file (IODF), which contains I/O configuration data. An IODF can define multiple hardware and software configurations to the z/OS operating system. When you activate an IODF, HCD defines the I/O configuration to the channel subsystem and the operating system.

Through the HCD activate function or the MVS™ ACTIVATE operator command, you can make changes to the current configuration without having to initial program load (IPL) the software or power-on reset (POR) the hardware. Making changes while the system is running is known as *dynamic configuration* or *dynamic reconfiguration*.

You select the I/O configuration when you:

- POR
- IPL
- Activate a dynamic configuration change.

IPL and activation require that you identify the IODF that contains the definition of your configuration. A data set called an *I/O configuration data set (IOCDS)* is used at POR. An IOCDS can be created from a configuration definition in an IODF. The IOCDS contains the configuration for a specific processor, while the IODF contains configuration data for multiple processors.

---

## I/O configuration definition process

When you dynamically change an I/O configuration, you can change the I/O definitions for hardware and software as follows:

- **Both hardware and software:** Usually, you make simultaneous dynamic configuration changes to both hardware and software configuration definitions.

- **Software only:** In some cases, you might want to modify only the software control structures, such as the unit control blocks (UCBs) and the eligible device table (EDT).
- **Hardware only:** You may configure an IBM Z processor that is not running an instance of HCD, for example a stand-alone coupling facility. Those processors need only hardware update because no operating systems runs on it that needs software configuration updates.

In some cases, hardware and software changes, initiated in one logical partition may affect the hardware configuration for other partitions. For more information, see [“Dynamically changing an I/O configuration in hardware”](#) on page 81.

## Defining an I/O configuration to the software

Figure 1 on page 2 introduces the process of defining an I/O configuration to the software. At IPL, the system reads an IODF and constructs UCBs, an EDT, and all device and I/O configuration-related control blocks. When you select and activate a new configuration, the system determines the changes needed to the UCBs and EDT based on comparing the current IODF and the newly selected IODF.

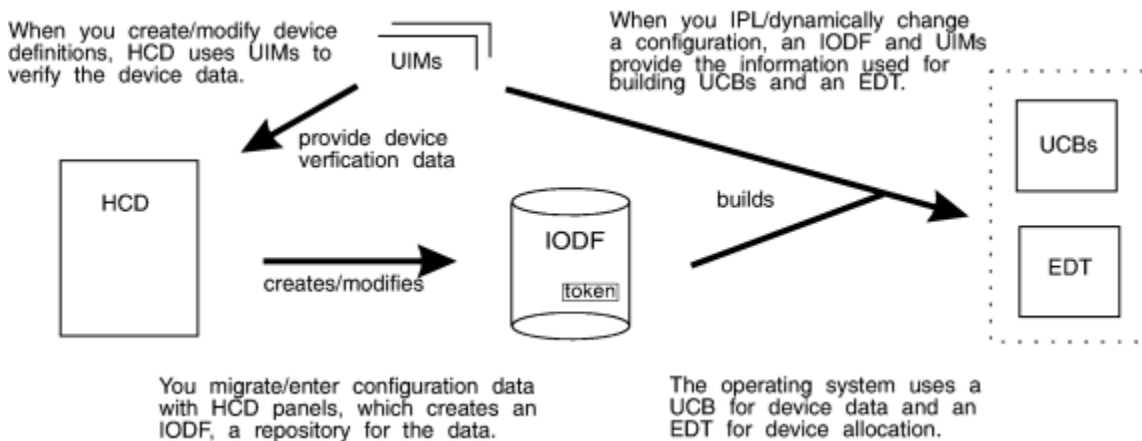


Figure 1. Defining an I/O configuration to the software

The major objects in [Figure 1 on page 2](#) are described in the sections that follow.

## Hardware Configuration Definition (HCD)

Hardware Configuration Definition (HCD) allows you to define I/O configurations to both the software and hardware from a single, interactive interface. To define configurations to the hardware and software, you use HCD to create an input/output definition file (IODF).

You can use HCD to perform the following major tasks:

- Define new configuration data (an IODF or parts of an IODF)
- Activate configuration data
- View and modify existing configuration data
- Maintain IODFs (such as, copy, import, and export)
- Query and print configuration data
- Migrate configuration data
- Compare a defined or active I/O configuration to an available I/O configuration, using automatic I/O configuration.

## Input/output definition file (IODF)

An input/output definition file (IODF) contains information about the I/O configuration, such as:

- Operating system data
- Switch data

- Device data, including EDT definition
- Processor data
- Partition data
- Channel path data
- PCIe-based functions
- Control unit data
- Channel subsystem data.

Three types of IODF exist: a work IODF, a validated work IODF, and a production IODF.

#### **Work IODF**

A work IODF allows you to create a new I/O configuration definition or modify an existing I/O configuration definition. A work IODF provides a way to build or modify an I/O configuration before you use it to activate the configuration. It is a working copy, not suitable for IPL selection or activated during dynamic activation. When a work IODF is ready to use, you need to build a production IODF from it.

#### **Validated work IODF**

A validated work IODF satisfies all validation rules for building production IODFs. It may lack at least one physical channel identifier (PCHID). In cooperation with HCD and the CHPID Mapping Tool a validated IODF is required to accept new or updated PCHIDs. From such a validated work IODF, an IOCP input deck suitable for use with the CHPID Mapping Tool is generated. As soon as all PCHIDs are inserted or updated in the validated work IODF, the production IODF can be built. In HCD, you can use various methods to obtain a validated work IODF.

#### **Production IODF**

A production IODF defines one or more valid I/O configurations. A configuration in a production IODF can be activated dynamically or selected during IPL. Although you can build multiple production IODFs, only the one that is selected during IPL or activated during dynamic configuration is the active production IODF.

To change a configuration, create a work IODF from a production IODF. When you attempt to change a production IODF, HCD automatically copies the production IODF into a work IODF so you can make your changes. When changes are complete, build a production IODF from the work IODF.

You can organize your configuration data in an IODF in multiple ways. For example:

- You can define multiple operating system and processor configurations in one IODF. The configurations can share common device definitions; this reduces the maintenance effort when devices are changed.
- For a processor that supports logical partitions, you can define the configurations for the processor and the operating systems running in the logical partitions of that processor in one IODF.
- From the IODF representing the complete configuration (master IODF), you can create IODFs containing parts of the whole configuration (for example, a processor with all of its relevant operating systems). These IODFs can be distributed to a target system and used for activation. Note that the processor token does not change during the distribution process. You can also merge distributed IODFs in the master IODF. For information about handling large IODFs, see *z/OS HCD User's Guide*.
- You can define several IODFs for the same hardware, with different configurations for use in different circumstances. However, this approach is not recommended, because you might need to update multiple IODFs when you change the configuration.

## **Unit information module (UIM)**

A unit information module (UIM) contains the information and rules that HCD uses to process I/O device definitions. When you create an IODF, HCD uses UIMs to validate the device definitions that you enter. The system invokes UIMs at IPL or during a dynamic configuration change to build UCBs.

UIMs are provided with IBM product software for devices that z/OS supports. For a non-supported device, you might be able to use a generic UIM or a UIM from a similar IBM device.

## Unit control block (UCB)

A unit control block (UCB) holds information about an I/O device, such as:

- State information for the device
- Features of the device.

You can access information in UCBs using UCB services, such as UCBSCAN and UCBLOOK. At IPL or dynamic configuration, UCBs for all I/O devices connected to the current operating system configuration are built from HCD device definition information in the IODF and UIMs. There is a UCB for each I/O device in an operating system configuration.

## Eligible device table (EDT)

An eligible device table (EDT) is an installation-defined and named representation of the I/O devices that are eligible for allocation. Using HCD, you define EDT information in an IODF. At IPL or dynamic configuration, information in the IODF and UIMs is used to build the EDT.

## Defining a D/R Site Operating System (OS) configuration

HCD may generate a disaster recovery (D/R) Site OS configuration in the process of building a new production IODF. If your I/O configuration includes special secondary devices of type 3390D, defined with the PPRC usage type of DUPLEX, the devices are attached with OFFLINE YES to a regular OS configuration. A generated D/R Site OS configuration has all the same DUPLEX defined storage devices, attached with reversed OFFLINE parameter value. That is, if the primary OS configuration specifies OFFLINE NO, the D/R site OS configuration attaches the devices with OFFLINE YES and vice versa. A corresponding setting in the HCD profile provides an option to control automatic generation of D/R Site OS configurations if they have been manually modified.

## Defining an I/O configuration to the hardware

Figure 2 on page 4 introduces the process of defining an I/O configuration to the hardware. A configuration is initially defined to hardware when an IOCDs initializes the I/O configuration information in the hardware system area (HSA) during a POR. A configuration is also defined to hardware when information in HSA is updated during a dynamic configuration change. More detailed descriptions follow the figure.

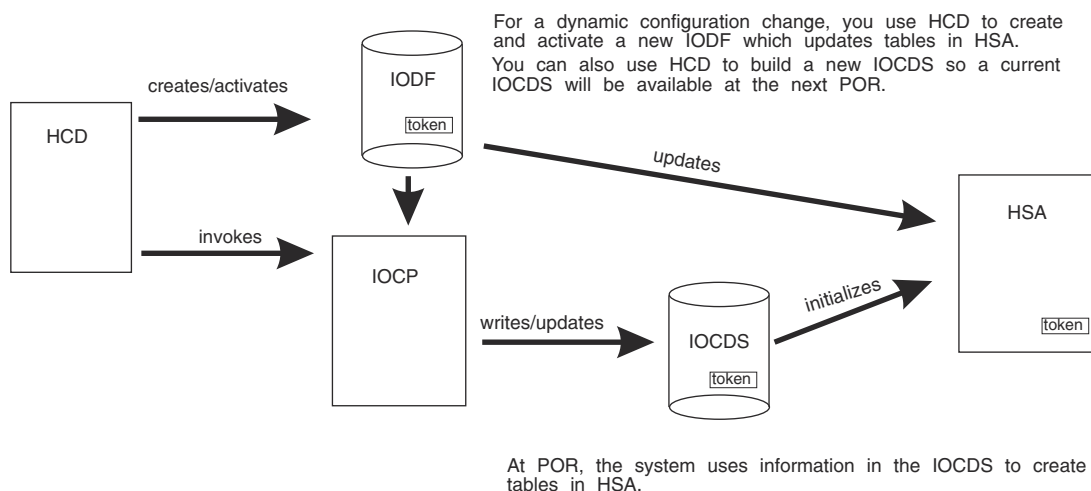


Figure 2. Defining an I/O configuration to the hardware

## I/O configuration program (IOCP)

I/O configuration program (IOCP) creates an IOCDs to define a configuration to the channel subsystem at POR. IOCP is shipped as part of the z/OS distribution, and a stand-alone version is available on a processor.

You can specify at any time that you want an IOCDS written for a configuration defined in an IODF. It is a good practice to write an IOCDS when you activate an IODF so a current IOCDS is available for the next POR. Use the HCD Activate and Process Configuration Data panel and its option "Build IOCDS". HCD invokes IOCP to write an IOCDS. IOCP builds a configuration definition from IODF information and stores the definition in an IOCDS so it is available when a POR is required.

Processors can have multiple I/O configuration data sets. On an HCD panel, you can specify the one that you want to update.

**Note:**

1. You can use the option "Build and manage IBM Z cluster IOCDSs, IPL attributes, and dynamic I/O changes" to update the selected I/O configuration data set for one or more processors. For more information, see ["Understanding a sysplex configuration"](#) on page 20.
2. When you install a new processor that does not contain an IOCDS, you can use HCD to build an IOCP input deck, transfer the data set to the USB flash memory drive, and run the processor's IOCP stand-alone program.

## **Input/output configuration data set (IOCDS)**

An I/O configuration data set (IOCDS) contains information to define the I/O configuration to the processor complex's channel subsystem. The IOCDS is created on the support element hard disk by IOCP. A POR loads the IOCDS into HSA to initialize the hardware to reflect the IOCDS.

## **Hardware system area (HSA)**

The hardware system area (HSA) contains tables that include information about the current configuration.

## **Ensuring that the software and hardware definitions match**

Before your first dynamic configuration change, you must use HCD to create an IOCDS from the IODF that will be used for a subsequent IPL, then perform a POR using that IOCDS. The POR places information about the hardware configuration in the hardware system area (HSA). The same IODF must be used at IPL to define the software configuration.

Before you can perform a software and hardware dynamic change, your hardware and software definitions must match. When you use the same IODF to define your software and hardware configurations, the software and hardware definitions match.

However, there might be times when you want to change your software definition, for example, to temporarily run a test system. To change your software definition, you might perform a software-only dynamic change using a different production IODF. If at the same time this IODF introduces one or more hardware changes to a processor configuration which the z/OS system selected for a software-only change, your software and hardware definitions do not match and you cannot perform a full hardware and software dynamic configuration change.

To be able to make a dynamic hardware and software change, you can perform a software-only change using the IODF that was used to define the current hardware configuration. This IODF is the one used to define the software and hardware configuration at POR or at the last full software and hardware dynamic configuration change.

You could also perform a POR and the subsequent IPLs using the IODF with the current software configuration so the software and hardware definitions match.

Of course, the software-only dynamic change does not require an IPL. You just need to remember the IODF that you last used to define the software and hardware configuration so you can use it for the software-only change. This IODF is the one you used for the last POR or the last full software and hardware dynamic change. When you use this IODF for the software-only change, the software and hardware definitions match.

On the HCD View Active Configuration panel, you can view the IODF used for the last POR or software and hardware dynamic configuration change. To display the panel, choose the “Activate or process configuration data” option from the HCD primary menu and then the “View active configuration” option.

You can also use a token called the hardware configuration token to find the IODF. (Do not confuse the hardware configuration token with the MVS I/O configuration token. The MVS I/O configuration token enables programs that require configuration data to detect that dynamic changes have occurred.)

The hardware configuration token exists in three places, as described in [Table 1 on page 6](#).

<i>Table 1. Location of Processor Configuration Token</i>		
<b>Where the Hardware Configuration Token Exists</b>	<b>When the Token Is Placed There</b>	<b>How You Can View the Token There</b>
In a production IODF, there is a hardware configuration token for each processor definition.	When you change a processor definition and build a new production IODF, a unique token is placed in the production IODF.	View the token in the Processor Token field on the HCD View Processor Definition panel.
In the IOCDS.	When you build an IOCDS, the unique token is placed in the IOCDS.	View the token from the Hardware Management Console or use HCD.
In the HSA.	When you POR your processor or activate a software and hardware dynamic change, the system uses the IOCDS information to create tables in the HSA, which then contains the unique token.	View the token when you enter the MVS command 'D IOS, CONFIG' or view the token on the HCD View Active Configuration panel.

The hardware configuration token uniquely identifies the hardware I/O configuration definition that exists at any given time. There are two parts in it:

- Processor token
- IODF identification.

The processor token consists of the processor ID and a world-wide-unique value (WWUV); a WWUV is not displayed and not documented.

Each time a change to a processor configuration is made, HCD generates a new WWUV and constructs a processor token when building a new production IODF. If no changes have been made to a processor configuration, the processor token remains unchanged in the new production IODF. For example, if an OS configuration gets changed, there is no effect on the processor configuration - thus the processor token remains intact.

The IODF identification contains:

- Timestamp (date and time) when the processor token for the active processor configuration was first generated by HCD
- IODF descriptor fields.

The timestamp is carried forward by HCD when it builds a new production IODF that does not introduce changes to a processor configuration.

The IODF descriptor fields may help the IPLing z/OS system to identify the production IODF, used by the previous IPL - see [“Specifying the IODF high-level qualifier” on page 72](#), and recovery scenario “Recovery of lost synchronization between HSA and the active I/O Configuration” in Appendix B. It is the reason why IBM strongly recommends to NOT override the descriptors in the Build a new Production IODF dialogue in HCD.

[Table 1 on page 6](#) explains locations of the hardware configuration token. The software and hardware definitions match only if the processor tokens, extracted from the hardware tokens in HSA and the IODF chosen for the current IPL, match.



To determine the IODF that you last used for the software and hardware definition, view the token in HSA. Then view the tokens for each processor definition in the production IODFs until you find the IODF with the token that matches the token in HSA.

After you determine the IODF from the last POR or software and hardware dynamic configuration, use that IODF for a software-only change to have the software and hardware configurations match.



**Attention:** If the only IODF matching the hardware configuration in HSA is accidentally deleted or overwritten, no dynamic changes are possible until after the next POR. For this reason, always keep a backup copy of your current IODF.

## Changing hardware and software I/O configuration definitions

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Changes to an I/O configuration include adding, deleting, and modifying the definitions of I/O components. Additionally, the I/O autoconfiguration function may be used for discovery of FICON attached tape and disk storage devices.

### Note:

1. Some changes to device characteristics cause the UCB to be deleted and added again when the dynamic configuration change occurs. Messages IOS500I and/or IOS502I reports the deleted and added device.
2. Any dynamic change that causes a device UCB to be deleted and added again also causes the device MIH time interval to be reset to the default MIH setting for its device class. To reestablish the previous MIH interval, enter the MVS command SETIOS MIH when the dynamic change is completed. For information about the SETIOS MIH command, see *z/OS MVS System Commands*.

There are now three kinds of dynamic configuration changes: software-only changes, hardware and software changes, and hardware-only changes. Most of the time, you will be starting from dynamic software only changes, either in preparation to the final dynamic hardware and software changes, or for some other reasons, for example for changing esoteric device names. Dynamic software and hardware configuration changes are required when you need to change hardware components of your configuration, for example add new control units and devices. See [“Making software-only dynamic changes” on page 7](#) and [“Making both hardware and software dynamic changes” on page 8](#).

## Making software-only dynamic changes

On many occasions you will need to make dynamic configuration changes in software-only mode. However, there are times when software-only changes are required for either recovery purpose or in preparation to changes of your hardware configuration.

- When changing the hardware configuration of the processor with a few systems running in multiple logical partitions. You make software-only changes in all partitions except one; in the remaining partition, you make a software and hardware change. (See [“Dynamically changing an I/O configuration in hardware” on page 81](#).)
- When the software I/O configuration does not match the hardware I/O configuration. For example, when the IODF that you used for IPL does not contain the hardware I/O configuration used to create the IOCDs.

You can use the software-only change to synchronize the software definition to the hardware definition so that a subsequent hardware and software change can be activated. When a software-only change switches the IODF, the new IODF can contain a processor configuration token that matches the current processor configuration token in HSA.

- When z/OS is a guest operating system running under z/VM®.

You cannot use dynamic configuration to make hardware changes in a z/OS guest system running under z/VM. However, you can use dynamic configuration to make software-only changes in the z/OS guest system. Thus, you can add new devices to a z/OS guest system using a z/VM interface (such as ATTACH or DEFINE), then use dynamic configuration to make software-only changes in the z/OS guest system. However, you must run this configuration change with the NOVALIDATE parameter.

- When z/OS is running on a processor, on which support of dynamic configuration changes to hardware I/O configuration definitions is turned off in the Activation Profile on HMC. Or z/OS itself does include support of new hardware features installed on a processor. You can still make a software-only change, for example, to update the EDT or change the definition of a device from not shared to shared.

To make software-only changes, follow these steps:

1. Plan for your changes to the device definitions in the configuration. For example, for adding devices, check that the device code was loaded at the last IPL. For deleting devices, verify that the device is not needed by any application running in the processor. For more information, see [“Making dynamic changes to I/O devices” on page 85](#).
2. Describe the new I/O configuration definition in an I/O definition file (IODF) that you create through HCD. Optionally, use the I/O autoconfiguration function. See *z/OS HCD User's Guide*.
3. Activate the new IODF using the HCD Activate New Configuration panel or the ACTIVATE command:

- On the HCD Activate New Configuration panel, choose either of the following options:
  - Activate software configuration only and validate hardware changes
  - Activate software configuration only

Always choose the “Activate software configuration only and validate hardware changes” if changes affect coupling facility links and/or PCIe functions. I/O components being deleted must not be in use.

- On the ACTIVATE command, specify the SOFT keyword for software-only changes.

For more information, see [Chapter 4, “Dynamically changing an I/O configuration,” on page 77](#).

## Making both hardware and software dynamic changes

Before changing the hardware configuration of the processor with a few systems running in multiple logical partitions, choose a system where you will invoke both hardware and software changes after making software-only dynamic changes on all other active systems. After completing software-only dynamic changes, return to the chosen system and follow these steps:

1. Activate the new production IODF using the HCD Activate New Configuration panel or the ACTIVATE command.

On the HCD Activate New Configuration panel, choose the “Activate hardware and software configuration” option.

If you are using the ACTIVATE command, do **not** specify the SOFT keyword for hardware and software changes.

2. Always start from running in TEST mode. In TEST mode, the system does not make changes: rather, it reports on found issues that may result in dynamic configuration failures. Address found issues, using the work IODF, then build a new production IODF by overwriting the IODF created earlier. Try TEST mode again. When the system no longer reports on potential issues, invoke the configuration change. Use the HCD Build IOCDS task to write a new I/O configuration data set (IOCDS), if one does not already exist. You can make the new IOCDS the default for the next POR from HCD or by issuing the ACTIVATE command with the ACTIOCDS=xx keyword. If necessary update the LOADxx members for each system to identify the new IODF.
3. Install the new I/O components that you have dynamically added through the new IODF. As required, perform the following tasks:
  - Configure the channel paths
  - Initialize devices, for example, format DASD with the volume serial
  - Enter the MVS VARY DEVICE command to make the device available to the system, for example, 'VARY dddd,ONLINE'.

For more information about making dynamic changes, see [Chapter 4, “Dynamically changing an I/O configuration,” on page 77](#).

## Making a dynamic change using “Hardware Changes Only” on a Standalone Coupling Facility

A standalone coupling facility (SACF) is a server entirely dedicated to running CFCC microcode using all processors, links and memory for CF use only.

HCD provides the capability of dynamically activating changes on a SACF. Prior to this support, it would require a disruptive outage (Power-On-Reset or CPC Activation) to make any changes to coupling link connectivity and/or a coupling facility image that resides on a SACF.

Using the “Hardware Change Only” option enables HCD running on z/OS to communicate with a SACF via Licensed Internal Code to manage the dynamic changes. This functionality requires support in the hardware as well as z/OS and HCD.

In order to activate these hardware only changes on the SACF, it is recommended that you follow the same general process as you would have previously, where you would choose a system to invoke both hardware and software changes. After completing the software only changes to all other active systems, you can activate the changes on the SACF by following these steps (Activate the Hardware Only change first on the SACF, then Activate the IODF on z/OS images using standard recommendations. For example, software changes in all images, hardware changes in the last image.):

1. Build new production IODF that includes the changes intended for the Standalone CF.
2. Perform Hardware Only - ACTIVATE TEST to check for any errors in the configuration definition or other conditions that might prevent successful activate.
3. Activate the new Hardware Only changes on the Standalone CF using Activate Hardware Changes Only (Option 5 from Processor List).
4. Verify successful completion of the dynamic activate via HCD messages.
5. Configure on coupling CHPIDS and/or activate new coupling facility images (if required).
6. Activate IODF using recommended approach in z/OS images. For example, Software changes (with VALIDATE) in all images and hardware change in the last image per CPU. Write IOCDs's to z/OS CPU's and Switch.

For more information, see [Chapter 4, “Dynamically changing an I/O configuration,”](#) on page 77.

## Using HCD I/O Autoconfiguration for automatic discovery of FICON connected DASD and tape control units and devices

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I/O Autoconfiguration is available starting with zEnterprise processors (processor type 2817). It may assist you in the process of identifying I/O hardware in the current I/O configuration that has not been configured in the active IODF. Results of automatic discovery complement the existing I/O configuration in a new work IODF, created as a copy of the active IODF. The scope of automatic discovery covers switched FICON connected or FICON directly connected DASD and tape control units and devices. The Autoconfiguration function is a part of the Define, Modify, or View Configuration Data dialogue in HCD. After completing automatic discovery, it presents the discovered controllers, control units and devices to the user and offers proposals how to configure them. You can create an Autoconfiguration policy which controls automatic definitions of discovered control units and devices. You can accept or change these definition proposals.

Additionally, you can consider I/O Autoconfiguration as a tool for checking the current active I/O configuration for possible physical miscablement and inadequate definitions.

## Using HCM for I/O definition

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Hardware Configuration Manager (HCM), an optional feature of z/OS, works with HCD to provide a set of graphical and text configuration reports. HCM complements HCD by adding information about the physical properties of the processors and I/O configurations to the logical information that HCD provides. For example, the physical information about processors and I/O configurations includes details about FICON® infrastructure such as cables, distribution panels, and patch panels.

HCM works as a client, using HCD as the server application. It takes advantage of many HCD services, for example, it uses the HCD validation. Working with HCD, HCM combines logical and physical definitions into a single process. The HCM graphical interface allows users to define the configurations and to locate and display configuration objects and their connections. It also allows users to display operational data, such as system status information. The HCM graphical interface is helpful when planning configuration changes and doing problem determination.

For more information about HCM, see *z/OS and z/VM HCM User's Guide*.

## Using CHPID Mapping Tool for assigning physical hardware attributes to CHPIDs

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A software tool, known as the CHPID Mapping Tool or CMT, should be used at the processor installation time for assigning Physical Channel Identifiers (PCHIDs) to defined channel paths, represented by CHPIDs, and PCIe-based functions. Additionally, the tool is used to assign virtual channel identification (vchid) numbers to IQD (internal queued direct communication (HiperSockets)) paths, and assign ports on available Host Channel Adapter (HCA) fanout cards to Infiniband channel paths. CMT must be installed on the Windows operating system. CMT needs two input files:

- A file that is downloaded from the z/OS system containing IOCP statements, generated in HCD using a validated work IODF, discussed in topic [“Input/output definition file \(IODF\)”](#) on page 2.
- A special CFReport configuration file, created by IBM to describe an IBM Z processor and installed features, and downloaded from the [Resource Link home page \(www.ibm.com/servers/resource link\)](http://www.ibm.com/servers/resource link).

CMT provides two methods for assigning PCHIDs, vchids and HCA ports: automatic and manual.

CMT always tracks available (installed) hardware features regardless of the chosen method. In automatic mode, CMT attempts to distribute PCHIDs, vchids evenly between defined control units according to their order in each CU type group. In manual mode, a CMT user may set CU priorities, thus influencing CMT decisions in favour of installation requirements; also, manual mode is used for assigning HCA ports to Infiniband paths if CMT does not accept HCA ports in the input IOCP file.

When all assignments are completed, a file with updated IOCP CHPID statements is generated and uploaded onto the z/OS system. Updated IOCP CHPID statements are migrated into the validated IODF and a new production IODF is to be built. CMT may be used at post-installation time as well if the processor has not been re-configured by adding/removing hardware features / I/O cards. It will be your responsibility to retain the CFReport configuration file, created by IBM, for any such reconfigurations. For more information about the CHPID Mapping Tool, see the *IBM Z CHPID Mapping Tool User's Guide*.

## Chapter 2. Planning your I/O configuration definition

Before you can create an IODF, you must first gather the necessary information.

This topic includes the following information:

- [“Components of an I/O configuration” on page 11](#)
- [“Making decisions about your configuration” on page 13](#)
- [“Understanding a sysplex configuration” on page 20](#)
- [“Defining shared channel paths” on page 24](#)
- [“Specifying an I/O device number” on page 34](#)
- [“Specifying I/O device parameters and features” on page 38](#)
- [“Defining allocation preferences” on page 48](#)
- [“Migrating to subchannel sets” on page 58.](#)

### Components of an I/O configuration

Figure 3 on page 11 shows typical components of an I/O configuration:

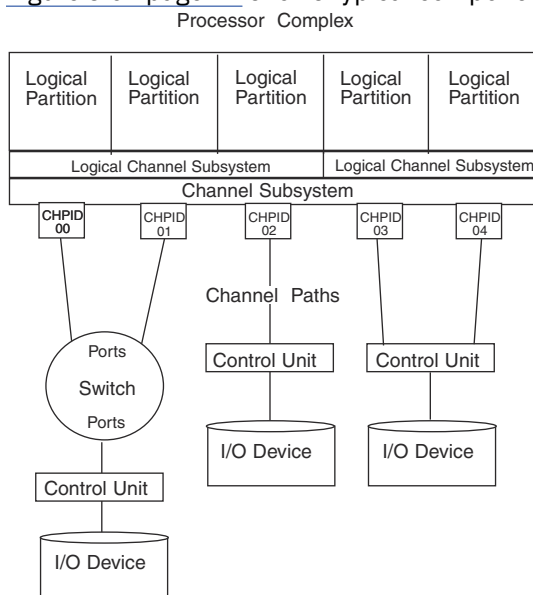


Figure 3. I/O configuration example

When you define an I/O configuration, you specify:

- Operating systems
- Eligible device tables (EDTs) with esoteric device groups
- Processors
- Logical channel subsystems
- Partitions
- PCIe functions
- Channel paths on the processor(s)
- Fibre Channel switches attached to the channel path (if any)
- Control units attached to channel paths or switches
- I/O devices in one or more subchannel sets and connected to the control units.

## Logical channel subsystems

An IBM Z processor manages I/O resources (logical partitions, channel paths, control units, I/O devices) by housing them in multiple logical channel subsystems (CSS). Each CSS, may have up to 256 channel paths. Channel paths of certain types may span boundaries of one CSS; logical control units on spanned channel paths may be defined in all or some CSSs accessed via corresponding spanned channel paths. Additionally, a CSS provides for multiple subchannel sets. An alternate subchannel set increases the number of available device numbers in each CSS. A CSS is identified by a CSS id, which is a number of 0 up to the highest number supported by the processor type. Not all device types are eligible for non-zero subchannel sets, and this will be discussed later in the Chapter. Exact number of subchannel sets depends on a specific type and model of your processor, please consult with Appendix F. Machine limits and rules, in the z Systems Input/Output Configuration Program User's Guide for ICP IOCP (IOCP User's Guide).

## Logical partitions

The Processor Resource/System Manager (PR/SM) feature allows a single processor to run multiple operating systems in logically partitioned (LPAR) mode. Each operating system has its own logical partition, which is a separate set of system resources including:

- A portion of storage (central, or central and expanded)
- One or more central and specialty processors. The processors can be dedicated or shared.

Only LPAR mode is supported on IBM Z processors.

There are restrictions on a dynamic activation of partitions. You cannot dynamically activate a configuration that changes the name of a partition. The dynamic activation of such a change must be done in two steps. First change the partition into a reserved partition. Then you can activate the configuration with the new name.

## Logical control units for I/O devices

There are restrictions on a dynamic activation that adds or deletes a control unit based on how the hardware definition groups physical control units into logical control units. Each of the following is considered a logical control unit:

- A physical control unit with no devices attached
- A physical control unit that does not share any devices
- A set of physical control units that share any devices in common.

When a physical control unit or a group of control units that share devices have a channel path in multiple logical channel subsystems (CSSs), IOCP builds a control unit header (logical control unit) for each CSS. The control unit header in each CSS contains only the channel paths from the physical control units associated with that CSS. The control unit headers in each CSS are numbered independently of each other. The devices assigned to the physical control unit or group of control units become subchannels in each CSS and are numbered independently of each other.

The channel paths attaching to the control unit must be all unshared or all shared. You cannot mix shared and unshared channel paths to a control unit. All spanned channel paths are also shared channel paths.

The type of processor determines the limit on the number of physical control units in a logical control unit. [Figure 4 on page 13](#) shows examples of logical control units.

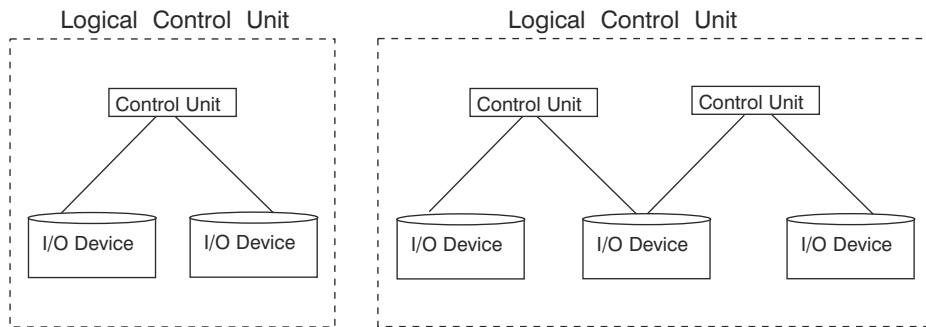


Figure 4. Logical control unit examples

You cannot dynamically activate a change that causes one of the following:

- A physical control unit to be added to a logical control unit if the addition causes two logical control units (with devices attached) to merge into one logical control unit
- A physical control unit to be removed from a logical control unit if the deletion causes a split of one logical control unit (with devices attached) into two logical control units. In this case, HCD message CBDA850I will be issued and a two step activation must be done. See *z/OS and z/VM HCD Messages*.

See *IOCP User's Guide* for requirements of defining control units to enable valid logical control units.

## Channel path numbering

A channel path is logically identified by a two-digit hexadecimal number called a channel path identifier (CHPID). Some model processor complexes can have gaps in their channel path identifier (CHPID) numbering scheme due to the mix and number of installed I/O cards. See the *IOCP User's Guide* for a description of the restrictions this might cause.

## Selection of the path to access an I/O device

You can specify a preferred channel path to an I/O device. When you do not specify a preferred path, the channel subsystem uses a rotation order for the initiation of I/O requests to a device.

The rotation order is based on the:

- Control unit number you specify for a control unit that attaches a device
- Order channel paths are specified on a control unit

In general the channel subsystem tries the first channel path you specify for each control unit that attaches to the device, beginning with the lowest numbered control unit. The channel subsystem then tries the second channel path, if specified, for each control unit that attaches to the device, beginning with the lowest numbered control unit. The channel subsystem repeats this process until all specified channel paths for all control units attached to the device have been tried. See *IOCP User's Guide* for more information.

Starting from the zEnterprise BC12 and EC12 server, the described algorithm was enhanced to recognize slower paths to a control unit and then treat them differently as long as their performance is slower than other paths to the same control unit.

Using HCD, you can supply the information to establish preferred channel paths and the rotation order. To specify a preferred channel path, when you define a device, you specify the CHPID for the channel path in the Preferred CHPID field on the HCD "Device / Processor Definition" panel.

## Making decisions about your configuration

Before you actually define your configuration, decide on and collect the general information about the configuration components in a configuration plan. HCD provides reports about the processor support and UIMs installed on your system. These reports include information about device types, their parameters and features, and current connectivity rules. The Supported Hardware Report and the I/O Definition



Reference are available as batch reports. After you define your configuration, you can use the reports that HCD generates to track updates to your plan.

After you create your configuration plan, use the HCD panels to specify the information about configuration components. HCD provides interactive help to describe the information for each field. The panels also enable you to request a list of options for some fields. For example, for the Processor Type and Model field, you can display a list of the available processor types to choose from with the Prompt function in the HCD panel.

The plan outline that follows shows the order that you would most likely follow to define your configuration:

1. Define operating system data
2. Define switch data
3. Define processor, logical channel subsystem, partition, channel path data, PCIE-based functions, and subchannel sets
4. Define control unit data
5. Define I/O device data
6. Decide about JES3 initialization stream checker data (if you are running JES3)

## IBM zSeries and IBM Z platform considerations

IBM Z and zSeries environments support the following:

- More than 15 logical partitions. Only LPAR mode is supported; you cannot run in basic mode on these processors.
- Multiple logical channel subsystems, which allow you to logically partition your physical channel resources to accommodate large-scale enterprise workload connectivity and high bandwidth demands. Each logical channel subsystem can have up to 256 CHPIDs and 15 logical partitions. See "Machine limits and rules" in the *IOCP User's Guide* for limits on a number of logical partitions in a logical channel subsystem.
- In each channel subsystem, besides subchannel set 0, there are additional subchannel sets (SS), starting from SS1. The number of additional SSs is processor dependent and documented in "Machine limits and rules" in the *IOCP User's Guide*. For additional information on defining subchannel sets, see ["Defining multiple subchannel sets" on page 18](#).
- Channels can be shared, or spanned, across logical channel subsystems. Spanned channels allow you to minimize the number of physical CHPIDs, switch ports and cables required. Channels that would otherwise be under-utilized could have their utilization increased by spanning them across logical channel subsystems. See ["Defining spanned channel paths" on page 29](#) for more information.
- On an IBM System z9® or later processor, you have maximum number of device parameters for each subchannel set that may be used by your installation. HCD defaults the maximum numbers to 63.75K for SS0 and to 64K for other available SSs.
- You can also disconnect the partition from any assigned resources using dynamic I/O. The partition will revert back to being a reserved logical partition — the space used by the partition is not returned to the available pool of storage. See ["Dynamically changing logical partitions to the I/O configuration" on page 83](#) for more information.

## Defining operating system data

To define the operating system configuration you need to decide on:

- An eight byte EBCDIC identifier for the configuration
- For eligible device tables (EDTs) for I/O devices:
  - Decide how many EDTs to define
  - Specify a two digit identifier for each EDT, for example, 20



- Decide how many esoteric device groups to define in each EDT
- Specify a name for each group
- Automatic generation of an operating system configuration for a Disaster Recovery (D/R) system.

See [“Defining allocation preferences” on page 48](#) for a description of EDTs and esoteric groups. When you define a specific device to your configuration, you specify the esoteric group in which to include the device as described in [“Defining I/O device data” on page 19](#).

## Defining switch data

Using HCD, you can define Fibre Channel (FC) switches. You can define an FC switch as a FICON FC switch (type 2032) or as a generic FC switch (type FCS). The FICON FC switch supports an internal switch control unit and device whereas the generic FC switch does not.

To define switches in your configuration, you need to know the switch type (for example, 2032 or FCS). You need to decide on:

- Switch ID, such as 01
- Switch control unit number and switch device number. A switch control unit and device may be used by RMF for measuring FICON director activities. When you specify a control unit number and device number in the HCD Add Switch panel, a control unit and device are defined to be the same type as the switch. Note that the FCS switch does not support a switch control unit and device.
- Description: text that you use to describe the switch

You also use HCD to define the connections of the switch ports to channels or control units. You can use HCD to define a matrix of all possible connections between any two ports as well.

Defining switch data is optional.

## Defining processors, PCIe functions, logical channel subsystems, partitions and channel paths

To define processors in your configuration, you need to know:

- Processor type and model.
- For a central processor complex (CPC) controlled through the Hardware Management Console, you require the SNA address of its support element. For more information, see [“Understanding a sysplex configuration” on page 20](#).
- Serial number: If you specify a serial number, the system uses the number to verify that it is updating the correct processor during IOCDS download. This verification does not occur for a CPC that has a SNA address defined in HCD.
- Support level of the processor. For example, A HCD support level describes which PCIe function types and channel path types are supported. It corresponds to a firmware MCL level. If only one support level is available for the processor type/model, you do not have to specify the support level in HCD.
- Local system name, used by coupling facility connections. To allow seamless processor upgrades, choose a name that does not depend on a processor type/model, and serial number. If a local system name is not specified, HCD defaults it to a CPC name in the specification of an SNA address.

To define processors in your configuration, you must:

- Choose an 8-byte alphanumeric processor identifier: a name that you assign to identify the processor in HCD, such as RN01PROC
- If the processor supports multiple logical channel subsystems, you specify the number of logical channel subsystems (at least one) or allow HCD to extend the number to a maximum for a given processor type.
- Supply a description: text that you use to describe the processor.
- SNA address and local system name as outlined earlier in this topic.

- Define logical partitions in logical channel subsystems.

To define multiple logical channel subsystems in your configuration, you need to know:

- Which partitions are assigned to each logical channel subsystem.
- Which control unit information, such as channel paths and link addresses are defined for each logical channel subsystem for a processor.
- What channel path access, candidate lists, and preferred paths to define for a logical channel subsystem.
- Which channel paths are defined to each logical channel subsystem. Note that when you define a logical channel path, you must associate it with a logical CHPID on the HCD panels.
- How many devices are allowed.

On an IBM zSeries 890 or later processor, you no longer specify the expansion percentages for HSA on the CPC image profile on the hardware management console (HMC). The expansion percentages are replaced by the maximum number of devices value when you define each of the logical channel subsystems. If you want to change this value, you must POR the machine. The default for the maximum number of devices value for each logical channel subsystem is 63K, so plan carefully to avoid wasting HSA space. For processor types with a fixed HSA, HCD extends a processor definition to the defined maximum when building a production IODF. The change is accepted with message CBDA202I and is only relevant temporarily as a preparation step for a processor type change.

- Whether to predefine additional subchannel sets for each logical channel subsystem (on an IBM System z9 or later processor). Use of additional subchannel sets is restricted to certain classes of devices. For more information, see [“Defining multiple subchannel sets” on page 18](#).
- How to map CHPIDs across multiple logical channel subsystems. CHPIDs are not unique across multiple logical channel subsystems, so to map a logical CHPID to a physical channel, you must specify a physical channel path attribute, which depends on a channel path type. Some processors support partitions that can run IBM provided code. These partitions are of type FW. They support only limited actions.
- Which Function Identifiers and User Defined Identifiers (UIDs) for PCIe functions (for example: zEDC) are to be defined.

**To define partitions**, you must choose:

- Partition name, such as MVS01 and RTR01
- Partition number/MIF image ID.

On an IBM zSeries 890 or later processor, the partition number and the MIF image ID are not the same. When you define your partitions on one of these processors using the "Add partition" panel in HCD, the value you specify is the MIF image ID, not the partition number. The system uses information in IOCDs to assign a partition number when you POR the machine. Because the value you specify on the HCD panel is a MIF image ID, the value must be between X'1' and X'F' and be unique within the logical channel subsystem. See [“Processors communicating through shared FICON channel paths” on page 27](#) for more information. Remember that HCD will automatically define logical partitions in each channel subsystem as reserved. Use the "Change" action to assign an actual partition name and MIF ID. For more information see [“Dynamically changing logical partitions to the I/O configuration” on page 83](#).

- Whether a partition will run an operating system, a coupling facility, or either, depending on whether coupling facility support is loaded. See [“Understanding a sysplex configuration” on page 20](#) for more information.
- Description: text that you use to describe the partition

**To define a PCIe function**, at the processor level, you can define PCIe functions based on Peripheral Component Interconnect Express (PCIe) adapters, attached to a supported system with processor type 2827 or later. To define a function, you need to know the following:

- The function type

- A channel ID associated with the function. It can be a physical channel ID (PCHID) if the function is for a real adapter, or a virtual channel ID (VCHID) for a virtual adapter. If you want to define a few function on the same channel ID, use virtual functions within the allowed ranges for the particular function type.
- A physical network ID (PNETID) if the value is supported by the function type and the function is used by z/OS.
- Logical partitions that may access the function. Only one logical partition may be in the access list.

**To define channel paths** in your configuration, you first make your physical layout decisions such as your CHPID numbers for channels, number of channel paths, channel path type, and switch information if channel path(s) are connected to a switch. The switch information includes entry switch ID, ports, and dynamic switch ID. Then you need to decide on:

- Operation Mode: If a processor is in LPAR mode, you can specify the operation mode, which indicates the access that logical partitions will have to a channel path. The operation modes that you can specify for channel paths in HCD are:

- **Dedicated** allows only one logical partition to access a channel path.
- **Reconfigurable** allows only one logical partition at a time to access a channel path, but you can reconfigure that channel path from one logical partition to another. You reconfigure a channel path using the MVS CONFIG CHP(xx) command.
- **Shared** allows more than one logical partition to access a channel path simultaneously. Sharing is limited to partitions in the same logical channel subsystem. For information about shared channel paths, see [“Defining shared channel paths” on page 24](#).

You can only specify shared mode when the support level of the processor has Multiple Image Facility (MIF) capability. See [“Defining shared channel paths” on page 24](#) for a description of the advantages and considerations for using shared channel paths.

- **Spanned** allows partitions in more than one logical channel subsystem to share the same channel.

Note that not all types of channel paths can be defined as spanned. See [“Defining spanned channel paths” on page 29](#).

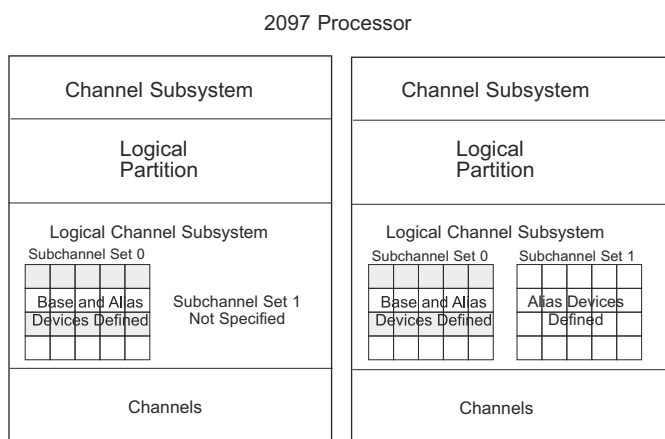
- Access and Candidate Lists: These lists specify which logical partitions can access a channel path. See [“Defining logical partition access to a channel path” on page 26](#) for information.
- Dynamic channel path management: If you are using dynamic channel path management, a subfunction of IRD, you must define which channels and control units will participate. See [“Defining dynamically managed channel paths” on page 28](#) for information.
- Intra-CPC communication: If you are using HiperSocket Accelerator, see [“Defining IQD CHPIDs and device types” on page 32](#) for information.
- Inter-CPC communication: If you are using a timing link, see [“Defining Server Time Protocol \(STP\) links in a sysplex” on page 21](#) for information.
- For a sysplex that uses the coupling facility, you need to decide on the connections between coupling facility receiver and coupling facility sender channels. The connections can be established using the 'View CF channel path connectivity' action on the HCD 'Channel Path List' panel. See [“Understanding a sysplex configuration” on page 20](#) for more information.
- You must specify a physical channel path attribute, such as a two-byte physical channel ID (PCHID) for each non-Infiniband channel and HCA/port for each Infiniband channel to map the logical CHPID to its physical card. You can specify them manually or use the zSeries CHPID mapping tool. You can get the CHPID mapping tool from the Resource Link home page ([www.ibm.com/servers/resourcelink](http://www.ibm.com/servers/resourcelink)). Note that some channel path types, such as IQD do not require a PCHID.
- You can define a channel path that is not physically installed on the processor. These are called over-defined channels. You might create over-defined channel paths if, for example, you wanted to prepare a configuration for future channel card upgrades. See [“Creating over-defined channel paths” on page 30](#).
- Description: text that you use to describe the channel path.

When you define a channel path, you specify the processor and the logical channel subsystems within the processor to which the channel will be attached. Define the processor before defining the channel path that is attached to it.

## Defining multiple subchannel sets

On an IBM System z9 (or later) processor, you can define multiple subchannel sets. Subchannel set 0 (SS0) can be used for most types of devices, additional subchannel sets (for example: subchannel set 1 (SS1)) can only be used for certain classes of devices, for example for parallel access volume alias devices. The limitations can be different depending on the operating system type. Use multiple subchannel sets to move devices of eligible device types to additional subchannel sets, then define more physical devices to SS0. See [Figure 5 on page 18](#).

To create an alternate subchannel set for parallel access volume alias devices for a logical channel subsystem, you must predefine it using HCD. You can then add and delete devices using dynamic I/O. Predefining an alternate subchannel set reserves the needed space for extra devices in the IOCDs. Then later, as needed, you can define devices and connect them to the I/O configuration using dynamic I/O. See [“Dynamic I/O configuration in a multiple LCSS environment” on page 99](#) for more information.



*Figure 5. Example of multiple subchannel set configuration*

You can use dynamic reconfiguration to move PAV alias devices to additional subchannel sets. For an example, see [“Example of migrating devices between subchannel sets” on page 58](#).

If a device is defined in an additional subchannel set, operating system configurations that have this device connected, may require a corresponding subchannel set specification.

## Defining control unit data

To define control units in your configuration, you need to know the control unit type and model, such as 2107. You need to decide on:

- Control unit number, such as 0060
- Connections to switches
- Description: text that you use to describe the control unit
- Processor(s) that the control unit will be connected to
- Logical channel subsystems that will have access to the control unit
- Information to attach the control unit to a channel path of the processor:
  - Channel path IDs
  - Link address
  - Unit address ranges that the control unit recognizes
  - Protocol

- I/O concurrency level: classification of a control unit based on its ability to concurrently operate and control the activity of attached devices without causing loss of control or data.
- Logical address, which is known as the CUADD value

If the control unit is a disk control unit that has SuperPAV capability where aliases can be shared among peer control units, path selection is one of the factors that determine whether control units are eligible to share alias devices. Only those control units with the exact same paths, in order, and those that share the alias management group number, as defined by the storage controller, are eligible to share alias devices. For more information about SuperPAV, see [“Using SuperPAV mode” on page 37](#).

## Defining I/O device data

To define I/O devices in your configuration, you need to know the device type and model, such as 3590. You need to decide:

- The device number you want assigned to a device, for example, 0015. See [“Specifying an I/O device number” on page 34](#) for considerations.
- Number(s) of the control unit(s) to which a device attaches.
- Unit addresses assigned to I/O devices. If a unit address is not specified in the definition of an I/O device, it is defaulted to two last hexadecimal digits in the device number.
- Use of non-zero subchannel set for eligible devices. For example: parallel access volume alias devices.
- Device parameters and features for defining a device to an operating system, including whether the device supports dynamic configuration or whether a tape device is automatically switchable. A non-zero subchannel set should be specified in the corresponding operating system configuration, if it has this device connected. See [“Specifying I/O device parameters and features” on page 38](#) for more information.
- For esoteric device groups (that you named in the EDT as part of defining operating system data):
  - Which I/O devices you will include in each group
  - Which groups you want to make eligible for VIO. See [“Defining devices as virtual I/O \(VIO\) eligible” on page 56](#).
- Any generic device types that you want to make eligible for VIO. See [“Defining devices as virtual I/O \(VIO\) eligible” on page 56](#).
- Any changes you need to make to the device preference table for each EDT.
- The I/O devices that you will allow z/OS to use as NIP consoles.

z/OS needs a console to initialize the system. The console can be a device that you identified as a nucleus initialization program (NIP) console through HCD. For each I/O configuration, you can specify through HCD a list of the devices that can be used as a NIP console. During system initialization, z/OS uses as the NIP console the first device in the list that is online and attached to the system.

If your processor has the console integration feature, you can use the system console to initialize the system, and you do not need to specify NIP consoles through HCD. For more information about the consoles that the operator uses to initialize a system, see *z/OS MVS Planning: Operations*.

- Device parameters associated with the processor, such as unit address and preferred channel path ID. This information includes whether you want to control logical partition access to devices when logical partitions get access through a shared channel path. If you do want to limit logical partition access, you specify that you want an explicit device candidate list when asked by HCD. See [“Defining logical partition access to a channel path” on page 26](#).

## Deciding about JES3 initialization stream checker data

Consider whether you need to create data that the JES3 initialization stream checker will use.

During the JES3 initialization process, you must define to JES3 the devices that JES3 manages. It is essential that the JES3 and MVS I/O configuration definitions be consistent. You can use the JES3

initialization stream checker to identify inconsistencies in the JES3 and MVS I/O definitions. The JES3 initialization checker looks for logical errors in the JES3 initialization statements.

The JES3 initialization stream checker can test for I/O definition consistency only if you supply data about the MVS I/O configuration definition. HCD enables you to write to a data set the MVS configuration data that the checker needs. You use the data set as input when you run the checker.

To write the configuration data to the data set with HCD, you choose the "Create JES3 Initialization Stream Data" option on the HCD Activate and Process Configuration Data panel. On the HCD Create JES3 INISH Stream Checker Data panel, you specify the following information:

- Name of the data set that you created to contain the MVS configuration data to be input to the JES3 initialization stream checker
- Identifier of the operating system configuration and EDT for which you want to create the data set.

## Understanding a sysplex configuration

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HCD offers you a single point of control for systems in a sysplex that includes a coupling facility for data sharing. A coupling facility is connected to the processors through channels. With HCD you can:

- Define the hardware and software configurations in a sysplex
- Manage IOCDS and IPL attributes across a sysplex
- Dynamically activate hardware and software configuration changes across a sysplex.

This topic provides overview information about HCD definitions required with systems in a sysplex that includes a coupling facility. It also describes using HCD to manage IOCDSs in a sysplex and configuring your tape devices in a sysplex. For information about how to dynamically activate configurations in a sysplex, see [“Dynamically changing an I/O configuration in a sysplex” on page 84.](#)

## Defining coupling facility components in a sysplex

A coupling facility is a special logical partition that runs the coupling facility control code (CFCC) and provides high-speed caching, list processing, and locking functions in a sysplex. HCD enables you to specify whether a logical partition can be a coupling facility, operating system, or either on certain processors. You connect the coupling facility logical partition to a processor through the coupling facility channels.

Processors of different types provide support of coupling facility (CF) channel paths of different types. For the list of CF path types supported by your processor, see "Machine limits and rules" in the *IOCP User's Guide*.

Using HCD, you define:

- A logical partition in which the coupling facility runs.
- You define CF peer channels on both sides of a coupling facility connection. A CF peer channel contains both sender and receiver functions. However, it is not required that these functions are used on both sides.
- Coupling facility control unit and devices. When you connect two CF peer channel paths, HCD proposes coupling facility control unit and device numbers on one or both sides of the connection depending on whether the sending function is used on only one or on both sides. You can override HCD's proposal to specify your own numbers for the control unit and device definitions.

These coupling facility control units and devices have different characteristics than control units and devices. The ones defined as a result of coupling facility connections are referred to as coupling facility control units and coupling facility devices.

Regardless of the CF channel path type used for the coupling facility connection, HCD uses Control unit type CFP and device type CFP for the generated control units and CF devices specified for each of the CF peer channel paths.



When you make connections between coupling facility channel paths, a coupling facility control unit and coupling facility devices are defined to represent the connections in the channel subsystem connection to the coupling facility. Actual number of coupling facility devices defined for each coupling facility path connection depends on a type of CF channel path involved. HCD does not create coupling facility devices for connected coupling facility channel paths defined as STP-only. One coupling facility control unit is defined for each coupling facility that a processor connects to. For example, one control unit is defined when two logical partitions on a processor are connected to the same coupling facility partition.

Coupling facility control units and devices are automatically defined by the CF peer-to-peer connections that are established. You do not have to use the "Define Control Unit Data" option that you use to define control units and you do not have to use the "Define Device Data" option that you use to define I/O devices. See ["Making changes to coupling facility devices and control units"](#) on page 95 for information about changes to the coupling facility definitions.

The characteristics that distinguish coupling facility components are:

- UIMs are not needed for coupling facility devices
- Coupling facility devices are not represented by UCBs
- An EDT and dynamic allocation do not pertain to coupling facility devices
- You do not select a preferred channel path to a coupling facility device
- You do not vary coupling facility devices offline
- Channel measurement blocks (CMBs) do not apply to coupling facility devices
- You cannot specify a unit address for a coupling facility device
- The concept of logical versus physical control unit does not apply
- You cannot specify a logical address for a coupling facility control unit.

To allow an operating system image to communicate with a coupling facility image in the same CPC without requiring any hardware resources, you can use Internal Coupling (IC) channels. Coupling communication over IC channel paths is provided by the CP microcode. Coupling channels can be configured into image along with Internal Coupling (IC) channels that need to be defined.

Except for channel packaging and providing connection information, IC channels follow the same configuration rules as real coupling facility channels.

Because you need no real hardware to perform IC functions, define IC channels with CHPID numbers that are not installed or are unusable because of other installed hardware. For the same reason, IC channels are defined without PCHIDs. An attempt to add a PCHID to an IC definition results in message CBDG523I.

Define the IC channels with the type ICP.

## Defining Server Time Protocol (STP) links in a sysplex

Server Time Protocol (STP) is designed to help multiple IBM Z servers maintain time synchronization with each other, without the use of a Sysplex Timer. STP uses a message-based protocol in which timekeeping information is passed over externally defined coupling links. These can be the same links that already are being used in a Parallel Sysplex® for coupling facility message communication.

An *STP link* is a coupling facility connection that serves as a timing-only link. With STP links, you can allow multiple servers to form a Coordinated Timing Network (CTN), which is a collection of servers and coupling facilities that are synchronized to a time value called Coordinated Server Time. Establishing an STP link between two processors does not require a CF partition; an STP link can be established between two OS partitions. For an STP link, HCD generates a control unit of type STP on both sides of the connection. No devices are defined.

You can establish an STP link between two processors. In the **Connect to CF Channel Path** dialog, select two CHPIDS capable for coupling facilities, and then specify the **Timing-only link** option to create an STP link.

## Reconfiguring coupling facility peer CHPIDs

A CF peer channel path may specify both z/OS images and CF logical partitions in its access and candidate lists. You can define a CF peer channel path as dedicated, reconfigurable, shared, or spanned. For a dedicated CF peer channel path, you can specify only one logical partition, running either an operating system image or a coupling facility. When you define a CF peer channel path as a reconfigurable, shared, or spanned, you can specify only one CF logical partition in its access list and one additional CF logical partition in its candidate list.

A coupling facility connection using CF peer channels must specify at least one z/OS image on one CF peer channel while the other CF peer channel must specify at least one CF logical partition. It is possible for each CF peer channel path of the connection to specify the same CF logical partition.

With respect to the sender and receiver functions, the restrictions for reconfiguring CF peer channels in CF logical partitions are analogous to the CF receiver channel path restrictions described previously with the exception of peer CF channel paths that are required to point to peer CF channel paths they are to talk to. To find eligible channel path types, refer to the z Systems *IOCP User's Guide* for the description of the CPATH parameter on the CHPID statement. If a peer CF path of this type is defined as spanned, with two or more CSS IDs in the path definition, you must match a planned change by modifying a definition of the connected peer CF path of the same type in HSA of the corresponding peer processor. HCD will display message CBDG422I as a warning.

For example, channel path 10 of type CIB spans CSS IDs 1 and 2 in processor 1. Its peer CIB channel path 11 in processor 2 points to CSS 1 as the lowest CSS ID for channel path 10.

An installation wants to add CSS ID 0 as the third one to the definition of channel path 10. HCD properly updates the connection created between the two CIB channel paths because the lowest CSS ID for channel path 10 must be changed from 1 to 0. The IODF now contains updated processor configurations of both processors: processor 1 and processor 2. Therefore, the installation should activate both the processor configurations. Activation of only one of the processor configurations may result in unpredictable results.

## Managing IOCDs and IPL attributes across a sysplex

HCD provides you with a single point of control for managing your I/O configuration data sets (IOCDs). On the HCD panels, processors are referred to as IBM Z processor clusters. You create IOCDs and update IPL parameters for each central processor complex (CPC) in an IBM Z processor cluster.

The Hardware Management Console consists of a hardware management console application (HWMCA) running on a PC and a LAN connected to the support element of each coupling facility and the support element of each CPC in an IBM Z processor cluster. Additionally, it is possible to access the HMC via the intranet using a web based HMC application.

Figure 6 on page 22 shows an example of support elements connected to a Hardware Management Console.

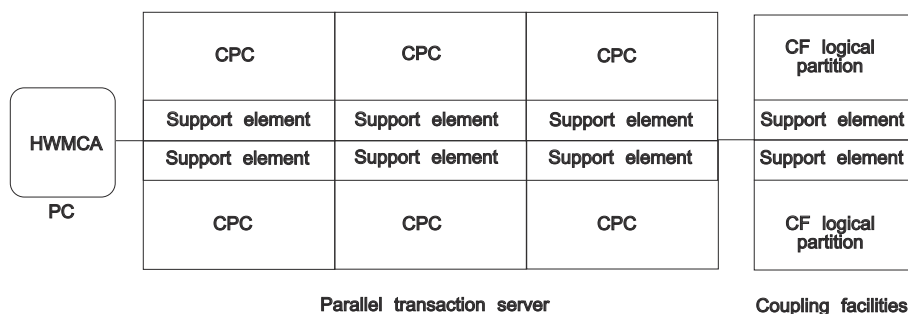


Figure 6. Support elements connected to the Hardware Management Console

The system network architecture (SNA) address of the support element identifies the attached CPC to the Hardware Management Console.



HCD uses the SNA addresses to enable you to perform, from a single system, IOCDS management for any processor managed by the HMC that also manages the processor HCD runs on. You can also use HCD to view and update the IPL address and LOAD parameter values for the next IPL. These values are used when IPLADDR(NEXT) and IPLPARM(NEXT) are specified on a load profile that is used to activate an operating system.

To enable these functions, you specify the SNA address of the support element on the HCD Add Processor panel when you define your processor. HCD provides a prompt facility that lists the SNA addresses for the currently active support elements.

**Note:**

1. Before you can use HCD to manage IOCDSs from a single system, you must use the Hardware Management Console to configure the processors. See *Support Element Operations Guide* for information about using the Hardware Management Console.
2. For HCD IPL address and LOAD parameter changes to be effective, the processor activation profiles set up with the Hardware Management Console must allow dynamic changes. See *Support Element Operations Guide* for more information about CPC activation profiles.
3. To view IOCDS status in HCD, you need READ authority to the CBD.CPC.IOCDS resource in the RACF® FACILITY class. UPDATE authority is required to change IOCDS status information. To view IPL attributes, you need READ authority to the CBD.CPC.IPLPARM resource in the FACILITY class. UPDATE authority is required to change IPL attributes. When the CBD.CPC.IOCDS resource is defined in the FACILITY class, the operator message asking for approval to write an IOCDS is no longer issued when someone attempts to write an IOCDS. Only users with UPDATE authority to the CBD.CPC.IOCDS resource will be able to write an IOCDS.

If a security product is not in operation, the HCD IOCDS management and IPL attribute functions are not available. For more information, see *z/OS HCD User's Guide*.

4. Only the processor that HCD is running in has to be operational to perform HCD IOCDS management and IPL attributes functions. As long as HWMCA and the support elements are operational, HCD can perform these functions on the other support elements even if the processors attached to these support elements are powered off.

## Using automatic tape switching

When you configure your tape devices in a sysplex, you must consider whether to have all your tape drives on one system, or whether you will spread them out. You can share tape devices across many systems, both with and without the need for manual intervention by the operator.

IBM offers the following ways for many systems to use the same tape devices:

- A **dedicated tape device**, which is varied online to one system at a time. For a second system to use that same device, an operator issues VARY commands (first VARY OFFLINE, then VARY ONLINE) to make the device available to the second system. In this information, tape devices are assumed to be dedicated unless specified otherwise.
- An **automatically switchable tape device**, which can be online to more than one system at a time. For one system to use an automatically switchable tape device, then another system to use the same device, an operator does not have to enter any VARY commands. When the system selects that device for allocation to a job step, the device is at once both assigned to the specific system and allocated to the job step. Automatically switchable tape devices require that the systems in the sysplex communicate with each other with the ATS STAR method.

You can define a tape device as automatically switchable through HCD. For information about automatic tape switching, including benefits and setup recommendations, see *z/OS MVS System Commands*.

## Preparing for automatic tape switching

Preparing for automatic tape switching requires you to:

- Decide how many automatically switchable devices to define; see [“Deciding how to use automatically switchable devices”](#) on page 24.
- Define tape devices as automatically switchable; see [“Defining a tape device as automatically switchable”](#) on page 40.

### ***Deciding how to use automatically switchable devices***

The system programmer determines the appropriate balance of dedicated devices and automatically switchable devices to meet the installation's needs. Factors that affect the decision are:

- The number of systems in the sysplex
- The number of devices that are eligible for automatic tape switching. Automatic tape switching requires "assign-capable" tape devices, such as 3490 or 3480 tape drives.
- The systems' workloads and the number of jobs requiring tape devices.
- Whether the installation has other ways to manage devices, such as JES3 or a vendor product.

Generally, tape devices that are already available to multiple systems and used periodically but not constantly are candidates for being defined as automatically switchable. These devices can be used more efficiently when available to any or all systems in the sysplex.

You might have good reasons to have a mixture of dedicated and automatically switchable devices in an installation. Consider the following example that shows a good way of splitting up your tape devices. In our example, a computing environment includes:

- An IBM Z processor that runs the company's large batch applications
- An IBM Z processor cluster that runs a CICS® OLTP workload
- A coupling facility that connects the IBM Z processor and the IBM Z processor cluster
- 60 3490 tape devices

Because of their heavy demand for storage, the batch jobs on the IBM Z processor need the majority of the tape devices. The CICS applications have occasional and short-term need for tape devices. Rather than having an operator vary the tape devices online and offline as the systems' requirements for tape devices change, divide the tape devices so that the batch work and the CICS workload use the tape devices as follows:

- 50 of the devices are dedicated to the batch work on the IBM Z processor.
- 10 of the devices are automatically switchable across the systems in the IBM Z microprocessor cluster.

### ***Operational considerations for automatic tape switching***

The operations staff is responsible for varying the automatically switchable devices online. They also must respond to messages that describe problems caused during automatic tape switching.

For considerations, see *z/OS MVS System Commands*, which describes how to:

- Define automatically switchable devices
- Display information about automatically switchable devices
- Respond to automatic tape switching events

## **Defining shared channel paths**

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This topic provides background information that is helpful if you are defining shared channel paths in your I/O configuration.

Multiple Image Facility (MIF) capability enables logical partitions to share channel paths, such as FICON and coupling facility channel paths, between logical partitions within a processor complex. In an IBM Z processor, all logical partitions can access the same shared channel paths, thereby reducing the number of required physical connections.

Figure 7 on page 25 compares three unshared channel paths to a single shared channel path. In processor complex A, three logical partitions can access an I/O device through three unshared channel paths. In processor complex B, three logical partitions can access an I/O device through a single shared channel path.

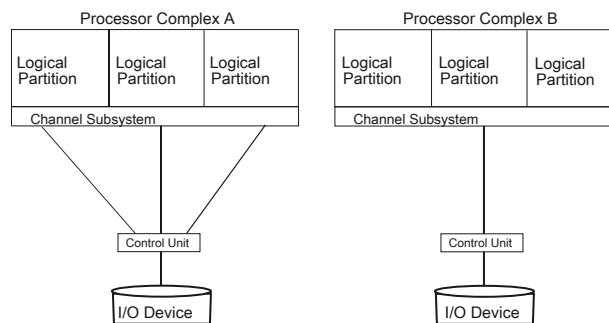


Figure 7. Shared channel paths

## Considerations for sharing channel paths

Before using shared channel paths, observe the following considerations:

- FICON channel paths can be shared. All OSA type channels, CF peer channels and CIB/CS5/CL5 channel paths can be shared.
- Using shared FICON channel paths does not reduce the number of logical paths needed at a control unit. A control unit requires a logical path for each logical partition that can access a shared channel path. For example, in [Figure 7 on page 25](#), the control units shown connected to processor complexes A and B both require three logical paths for the three logical partitions.
- The performance characteristics (for example, response time and throughput) as observed by each logical partition sharing a channel path depend on the total workload on the channel path. You should use multiple shared channel paths to provide adequate performance and recovery capabilities for critical I/O devices.

## Defining logical partition access to a channel path

You should use HCD to specify which logical partitions have access to the channel path. You specify access by including a logical partition on the following channel path lists in HCD:

### channel path access list

A logical partition that is on a channel path's access list can access the channel path when the logical partition is initially activated at POR. When a channel path is dedicated or reconfigurable, you specify one logical partition on the channel path access list. When a channel path is shared, you can specify more than one logical partition on the channel path access list.

### channel path candidate list

A logical partition that is on a channel path's candidate list can eventually access the channel path. A logical partition on this list can access the channel path when the channel path is configured online to the logical partition

**Note:** HCD automatically considers a logical partition in an access list to be in the candidate list.

The operation mode of the channel (dedicated, reconfigurable, shared or spanned) determines the need for a candidate list. Dedicated channel paths are not reconfigurable so they do not need a candidate list. If no logical partition is specified on an access list for a reconfigurable, shared or spanned channel path, then you specify logical partitions on the candidate list. Also for a shared or spanned channel path, if all the logical partitions are specified on the access list, they are all sharing the channel path initially so a candidate list is not necessary. However if not all the logical partitions are specified on the access list, a logical partition may be able to access the channel eventually if the logical partition is on the channel path candidate list.

When you define a device, HCD and IOCP also allow you to control logical partition access on a device level. A device might be attached to a control unit that uses from one to eight shared channel paths. You can specify that only certain logical partitions sharing the channel path have access to the device.

To limit logical partition access, you specify that you want an explicit device candidate list when you define a device. On the device candidate list, you indicate the logical partitions that share the channel path(s) that can access the device. When you do not specify a device candidate list, all the logical partitions that share the channel path to the device can access the device. For a logical partition to use the device, the logical partition would have to be in the access list or candidate list of a channel path going to the device.

Sharing channel paths provides flexibility and reduced cost for an installation when defining an I/O configuration. An installation selects which I/O devices to access through shared channel paths, and can define and dynamically change which partitions have access to these channel paths and to the devices connected to them.

**Note:**

1. When dynamically activating a configuration that adds a partition to the access list of a channel path, you must configure the channel path online to the partition, using the CONFIG command. You must use the CONFIG command at least once; afterward, PR/SM will configure the channel path to the partition during subsequent PORs. See *z/OS MVS System Commands* for information about the CONFIG command, and see *PR/SM Planning Guide* for information about the CHPID command and for a description of automatic configuration of channel paths to partitions.
2. Managed channels must be associated with a specific sysplex, and only images that are members of that sysplex can use them. The channel path access list and channel path candidate list cannot be specified for managed channels. For more information, see [“Defining dynamically managed channel paths”](#) on page 28.

## Processors communicating through shared FICON channel paths

I FICON CTC (FCTC) provides Channel-To-Channel communication at a high bandwidth and with great connectivity.

FICON CTC connections that are defined through a switch can be validated and reported in HCD (see the CTC Connection Report in *z/OS HCD User's Guide*). When using HCM, a separate dialog is provided for defining CTC connections. See *z/OS and z/VM HCM User's Guide*.

### Using FICON CTC connections

FICON CTC does not require that you explicitly define the CTC control unit function to one channel side or the other. The channel itself decides which side will contain the control unit function. That means, both sides of an FCTC connection use an FC channel path that is defined to one or more FCTC control units representing the target systems for the CTC connections. A logical address is required when the FC channel path is attached to a shared FC channel path to identify the logical partition to be communicated with. When attached to an unshared FC channel path, the logical address must be zero or not specified.

FICON CTC communication within a single processor complex can be accomplished with a single FC channel path connecting to an FC switch, that is, both sides of the CTC connection are represented by the same single FC channel path. This results in:

- A reduction in the number of channels required
- A simplified configuration design
- A simplified configuration definition.

### Considerations for CTC connections, based on FICON channels

FICON CTC (FCTC) connections may be switched or non-switched:

- A non-switched (direct) FCTC connection requires two FC paths, defined with no specification of an entry FICON switch ID. FCTC control units on such paths are defined without switch port specifications. Consider adding matching arbitrary serial numbers to control unit definitions in an FCTC pair if you wish to generate a CTC Connection report with valid non-switched FCTC connections.
- Switched FCTC connections may be defined, using one or two FICON switches. Switched FC channel paths must be defined with entry FICON switch IDs. If an FCTC connection uses a single FICON switch, definitions of corresponding FCTC control units must include one-byte link addresses, each one consisting of a one-byte link port number. If two FICON switches are used, definitions of corresponding FCTC control units must include two-byte link addresses; each address consists of a one-byte FICON switch address (it may be different from a corresponding FICON switch ID) and a one-byte link port number. When you specify a two-byte link address for an FC channel path, every link address for that channel path must also be two-byte. Additionally, when a two-byte link address is specified for a channel path, specify two-byte link addresses for all paths that have the same entry switch.

If an FCTC control unit is defined on a shared FC channel path, the target logical partition, represented by this control unit, must be excluded from the explicit device candidate list in definitions of all FCTC devices, connected to the control unit. Only logical partitions, eligible to access the target logical partition, should be added to the explicit device candidate list.

FCTC devices in a CTC pair may talk to each other only if they are defined with the exact same unit address. Therefore, special attention should be paid to unit address ranges in definitions of FCTC control units. IBM recommends to start the range from 00. IBM also recommends to generate a CTC connection report which may help you to validate defined CTC connections.

See IBM Z FICON Channel-to-Channel Reference publication for additional information and examples. You can download the publication from the [Resource Link home page \(www.ibm.com/servers/resourceLink\)](http://www.ibm.com/servers/resourceLink).

## Defining dynamically managed channel paths

An integral part of Intelligent Resource Director (IRD) is dynamic channel path management. Instead of defining a fixed number of channel paths to control units, this function lets Workload Management (WLM) move channel paths through the FICON switch director from one control unit to another, in response to changes in the workload requirements. By defining a number of channel paths as "managed," they become eligible for this dynamic assignment.

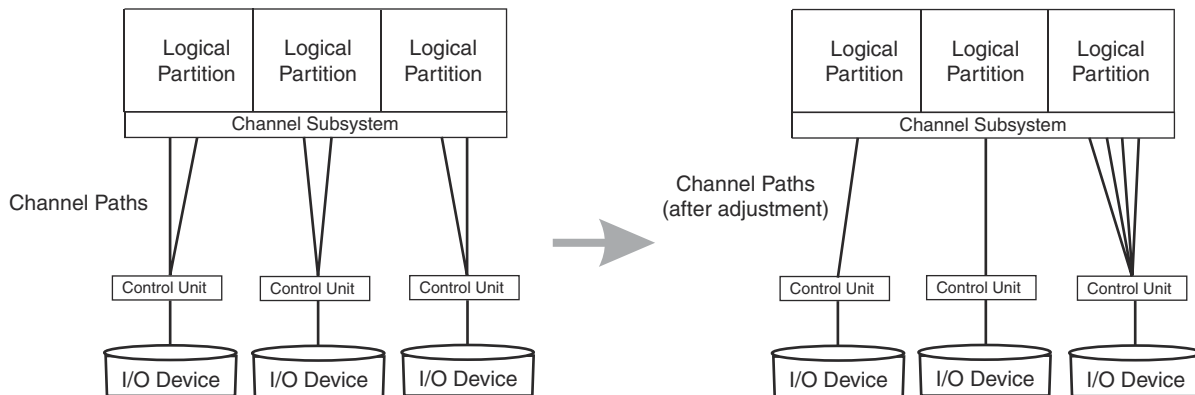


Figure 8. Dynamic channel path management

Dynamic channel path management works in two modes: *goal mode* and *balance mode*. In goal mode, dynamic channel path management will manage the channel paths to best meet the performance goals of the most important work, even at the expense of less important work, if necessary. In balance mode, dynamic channel path management will simply attempt to balance the responsiveness of all the DASD subsystems, moving dynamic channels as needed.

IRD allows an installation to group logical partitions that are resident on the same physical server, and in the same sysplex, into an LPAR cluster. This gives Workload Management the ability to manage resources, both processor and DASD I/O, not just in one single image but across the entire cluster of logical partitions. In LPAR mode, a coupling facility is required if you wish to use dynamic channel path management in any logical partition containing a system that is a member of a multisystem complex (even if the logical partition is the only member of that sysplex on this CPC). You do not need a coupling facility if all the logical partitions are running in XCFLOCAL or MONOPLEX mode.



**Attention:** Dynamic channel path management supports only non-synchronous control units, such as the Enterprise Storage Server®. A non-synchronous control unit transfers data with the host directly to and from the control unit cache. It does not support synchronous control units, nor control units that are synchronous on occasion. Dynamic channel path management supports only 100% non-synchronous control units.

The IBM Redbook *z/OS Intelligent Resource Director* (SG24-5952) provides information about choosing the appropriate channels and control units for dynamic channel path management. The installations most likely to benefit are the following:

- Installations approaching the 256 channel limit per logical channel subsystem.
- Smaller installations that do not have sufficient technical resources to design and monitor DASD subsystems
- Installations that experience large variations in channel utilization at different times of day

- Installations where the highest possible availability is an absolute requirement
- Installations with a large number of control units, and multiple control units, per channel
- Installations with a large number of EMIF channels.

After you have selected the appropriate channels and control units for dynamic channel path management, there are two HCD definitions that will need to be changed: the channel definitions and the control unit definitions.

To define a channel as being managed, you must specify YES in the Managed field on the “Add Channel Path” HCD panel. You must also specify a dynamic switch (in this case, the FICON director) to which the channel is attached. It is recommended that you also specify the entry switch ID and entry port so that HCD can do consistency checking.

You must also define the name of the LPAR cluster to which a logical partition must belong in order to have this channel in its configuration. Specify this name in the “I/O Cluster” field. Finally, you must also define this channel as being shared. Note that unlike traditional shared channels which potentially can be shared by all logical partitions on a CPC, managed channels can only be shared by logical partitions in the same LPAR cluster.

To define a control unit as managed, you must make changes to its definition in the “Add Control Unit” HCD panel. Whereas non-managed channel paths (otherwise called static channel paths) are defined through the CHPID number, a managed path is defined by specifying an asterisk (\*). The number of asterisks you specify will limit the number of managed channel paths per logical channel subsystem. The total number of non-managed and managed channel paths per logical channel subsystem cannot exceed 8. You must define the managed channel paths to the control unit in each logical channel subsystem.



**Attention:** You must define at least one non-managed channel path (which must be defined as shared) per control unit.

The control unit must be attached to a switch which in turn must be attached to managed channels.

See the *z/OS HCD User's Guide* for more information on how to define managed channels and control units.

## Defining spanned channel paths

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This topic provides background information that is helpful if you are defining spanned channel paths in your I/O configuration.

A shared channel path can only be shared by partitions in a single logical channel subsystem. In contrast, a spanned channel path is one that can be used by partitions in more than one logical channel subsystem. You must use the same CHPID value across all logical channel subsystems sharing the same spanned channel. However, logical channel subsystems that do not share a spanned channel can use that CHPID for other channels.

For more information, see [“Dynamic I/O configuration in a multiple LCSS environment”](#) on page 99.

## Considerations for spanning channel paths

Before using spanned channel paths, you need to consider the following:

- Spanned CHPIDs still use access and candidate control lists to restrict access within the logical channel subsystem.
- Spanning reduces the number of channels that can be used. For example, on processors with two logical channel subsystems, you can have up 512 channels available. However, each logical channel subsystem that has access to the spanned channel is using one of those 512 CHPIDs. So, if you have not defined any spanned channels, you have 512 channels available. If you define one channel as spanned across these 2 logical channel subsystems, you'll have only 511 channels available (512 - 2 used CHPIDs + 1 spanned channel). If you span all of your channels across all of your logical channel subsystems, you'll have 256 CHPIDs.

- Not all channel types can be defined as spanned. See the discussion of the CHPID statement in the *IOCP User's Guide* for details.

## Creating over-defined channel paths

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You can define a channel path that is not physically installed on the machine. This is called an over-defined channel path. You might do this if:

- You want to migrate from a processor with more channels defined than the target processor.
- You want to prepare your configuration for future channel card upgrades.

To distinguish an over-defined channel path from a physically installed one, use the character "\*" for the PCHID value when creating it. An over-defined CHPID must adhere to all validation rules, but is not recognized when you use the HCD Build IOCDS function to create and download an IOCDS. In addition, they are not included:

- In the IOCP statements
- In the CONFIGxx parmlib member
- During a dynamic activation

If a control unit contains only over-defined channel paths, the entire control unit, including any attached devices, is omitted from the configuration to be activated.

When you later physically install an over-defined channel path, you must edit the CHPID and replace the "\*" value with a valid PCHID. You must do this first even if you are going to use the CHPID mapping tool to assign the correct PCHID value.

## FICON channels

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FICON (fibre connection) channels increase the capacity of the channel subsystem.

### Channel path definitions

You can define Fibre Channels in the following way:

- The FC (Fibre Channel) channel requires a FICON interface at the control unit. FC channels can be attached directly to a control unit (point-to-point) or through a Fibre Channel (FC) switch or a FICON switch.

### Dynamic activation

There are no restrictions on dynamically activating an IODF that defines FC channel paths.

### Considerations for CTC connections, based on FICON channels

FICON CTC (FCTC) connections may be switched or non-switched:

- A non-switched (direct) FCTC connection requires two FC paths, defined with no specification of an entry FICON switch ID. FCTC control units on such paths are defined without switch port specifications. Consider adding matching arbitrary serial numbers to control unit definitions in an FCTC pair if you wish to generate a CTC Connection report with valid non-switched FCTC connections.
- Switched FCTC connections may be defined, using one or two FICON switches. Switched FC channel paths must be defined with entry FICON switch IDs. If an FCTC connection uses a single FICON switch, definitions of corresponding FCTC control units must include one-byte link addresses, each one consisting of a one-byte link port number. If two FICON switches are used, definitions of corresponding FCTC control units must include two-byte link addresses; each address consists of a one-byte FICON switch address (it may be different from a corresponding FICON switch ID) and a one-byte link port number. When you specify a two-byte link address for an FC channel path, every link address for that channel path must also be two-byte. Additionally, when a two-byte link address is specified for a channel path, specify two-byte link addresses for all paths that have the same entry switch.



If an FCTC control unit is defined on a shared FC channel path, the target logical partition, represented by this control unit, must be excluded from the explicit device candidate list in definitions of all FCTC devices, connected to the control unit. Only logical partitions, eligible to access the target logical partition, should be added to the explicit device candidate list.

FCTC devices in a CTC pair may talk to each other only if they are defined with the exact same unit address. Therefore, special attention should be paid to unit address ranges in definitions of FCTC control units. IBM recommends to start the range from 00. IBM also recommends to generate a CTC connection report which may help you to validate defined CTC connections.

See IBM Z FICON Channel-to-Channel Reference publication for additional information and examples. You can download the publication from the [Resource Link home page \(www.ibm.com/servers/resourcelink\)](http://www.ibm.com/servers/resourcelink).

## Open Systems Adapter Channels

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Open Systems Adapter (OSA) channels allow:

- Direct connection of LANs using the Queued Direct I/O (QDIO) architecture
- Connection of LANs using non-QDIO architectures
- Attachment of TN3270E emulators for channels running the non-SNA DFT protocol (OSA-ICC)
- Communication between a host OS partition using Channel Data Link Control (CDLC) and the NCP emulation on Linux® using QDIO.

For more information about OSA channels, see *zSeries OSA-Express Customer's Guide and Reference* or the *IBM z Systems Input/Output Configuration Program User's Guide* for ICP IOCP.

## Defining special devices and special secondary devices

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You can use HCD to define special devices and special secondary devices that are different from PAV alias devices. A *special device* is one that is defined in the alternate subchannel set (not subchannel set 0). A *special secondary device* is a Peer-to-Peer Remote Copy (PPRC) secondary device that is defined in the alternate subchannel set.

By placing devices in the alternate subchannel set, you can keep some device numbers free for later use. For example, you might choose to define a fixed block access (FBA) device, such as 3370, as a special device.

Unlike traditional devices, special devices and special secondary devices:

- Are not included in the system's eligible device table (EDT)
- Cannot be allocated through JCL or the DYNALLOC macro
- Cannot be varied online or offline by the operator.

Special devices and special secondary devices use the default MIH setting for their device classes. You cannot change the MIH interval for these devices through the MVS command SETIOS or through parmlib.

Special devices and special secondary devices are accessible only to authorized programs through the UCBSCAN and UCBLOOK macros. For more information, see *z/OS MVS Programming: Authorized Assembler Services Reference SET-WTO*.

### Defining a special device (3390S)

A device is considered special if it is defined in the alternate subchannel set. In HCD panels, a special device is shown as device type "3390S".

Observe the following considerations for a special device:

- The device is considered to be offline and in-use by the system.
- The IBM-provided DASD Error Recovery Procedure (ERP) is bypassed for an application that uses the device.

- The event notification facility (ENF) does not issue an event code to indicate the online or offline status of the device.
- To unbox a boxed special device, you can use the IOSODS service, that is: IOSODS OFF, then IOSODS ON.

## Defining a special secondary device (3390D)

You can place PPRC secondary devices (or *special secondary devices*) in the alternate subchannel set and use the SWAP command to dynamically switch the devices concurrent to the applications using them. In HCD panels, a special secondary device is to be defined as device type "3390D".

For special secondary devices, observe the following considerations:

- MIH values are not exchanged during a swap.
- The devices are configured to come up offline.
- To unbox these devices, use the VARY PATH,ONLINE command.

For PPRC device pairs, used by Basic Hyperswap, observe the following considerations:

- The four-digit device numbers for primary and secondary devices must match.
- For information on PPRC software and hardware requirements, refer to section Planning for Peer-to-Peer Remote Copy in [Planning for Peer-to-Peer Remote Copy in z/OS DFSMS Advanced Copy Services](#).
- It is best to add or delete PPRC pairs at the same time, in a non-swapped configuration.

You can request that HCD would maintain an optional D/R site OS configuration. Then, if 3390D devices are defined with the PPRC type of D (duplex), HCD will take care of proper OFFLINE attributes between the two OS configuration. See [“Defining a D/R Site Operating System \(OS\) configuration” on page 4](#) for details.

## Defining a special FBA device (FBA)

You can use disk devices, known as Fixed Block Architecture (FBA) or Fixed Block (FB) devices. Devices of this type may be considered as a data bridge between z/OS systems and Linux, UNIX®, and Windows® operating systems. Hardware support comes in the form of an optional licensed z/OS Distributed Data Backup (zDDB) multi-platform access feature on DS8700 and disk controllers of subsequent model types. External software support comes in the form of the IOSFBA service (and the macro with the same name), introduced by APAR OA41040.

Both HCD and HCM allow to define FBA control units and FBA devices. To do this, you need to:

- Define a new logical control unit of type 2107-FBA, attached to an IBM Z processor by no more than eight FICON channel paths.
- Define from 1 to 256 I/O devices of type FBA in subchannel set 0.
- Connect FBA devices to an operating system (OS) configuration.

Before allocation, FBA devices must be varied online. You can consider connecting them to an OS configuration with the OFFLINE NO attribute or using the regular VARY ONLINE system command. Since the FBA device type belongs to the Unit Record (UR) class of devices, an FBA device may be owned by only one address space at any given time and on the same system. However, FBA devices may be shared by systems in the GRS complex because the IOSFBA service uses ENQs with the scope of SYSTEMS (global ENQs) to serialize allocation of FBA devices. Sharing z/OS FBA devices between systems in different GRS complexes may cause allocation issues. See [z/OS MVS Programming: Authorized Assembler Services Guide](#) for more information on z/OS FBA services.

## Defining IQD CHPIDs and device types

HiperSockets is defined as a channel connection with a channel path type IQD. The IQD (Internal Queued Direct Communication) channel type allows communication between logical partitions on a single CPC and provides high speed, low latency access to data.

Define the IQD CHPIDs to HCD along with the control units (type IQD) and devices (type IQD) that reside on them. Note that the control units and devices defined to either of these channel paths do not represent real I/O devices but data in a TCP/IP stack.

For an IQD channel path type, the maximum frame size to be used for IQDIO requests on that channel path must be specified. Valid maximum frame sizes supported are 16K (default), 24K, 40K, and 64K. See *z/OS Communications Server: IP Configuration Guide* for further information.

The following configuration rules apply for the IQD CHPID type:

- On an IBM zSeries 890 or later processor, up to 16 IQD CHPIDs can be defined per CPC and can be spanned across all logical channel subsystems and shared among all LPARs needing the function. On an IBM z196 or later processor the number of IQD CHPIDs per CPC is increased to 32.
- On processors prior to the z890 or z990, you can define up to four IQD CHPIDs per CPC, to be shared among all LPARs needing the function. IQD CHPID numbers can range from X'00' to X'FF'.
- You can define up to 64 control units on each IQD CHPID. If more than one control unit is defined for an IQD channel path, a logical address is required for each control number. Control unit logical addresses can range from X'0' to X'F'.
- Up to 256 devices may be connected to an IQD control unit. The minimum value is 3. HCD has a default of 10 devices per control unit.

The maximum number of IQD devices that can be brought online at one time per z/OS image is 1023; however, because the z/OS Communications Server uses only a maximum of 10 online devices per IQD control unit for the HiperSockets function and you can define only 16 IQD CHPIDs per CPC, the number of usable devices per z/OS image is restricted to 160. Use caution when defining more than 1023 IQD devices. Because of the IOS device initialization algorithms, following an IPL, it is unpredictable which devices the system places online and which devices will be offline. When the 1023 device limit is reached, your attempts to issue VARY online commands for additional IQD devices are rejected with messages IOS577I and IOS579E. To bring additional IQD devices online, you must first VARY offline devices that were previously online. To identify which devices were not brought online, use the D M=CONFIG(xx) command.

- The total number of HSA subchannels for all IQD devices cannot exceed:
  - 12,288 valid HSA subchannels on an IBM zSeries 890 or later processor.

**Restriction:** You can define up to 256 IQD devices, but you cannot bring them all online simultaneously. The number of IQD devices you can bring online at one time is 160.

## Defining PCIe based functions

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Starting from zEC12 and zBC12 processors, an IBM Z processor may be ordered with native Peripheral Component Interconnect Express (PCIe) adapters for connecting feature cards with special functions to an IBM Z processor. For the list of supported PCIe function types, refer to the documentation about your processor.

Unlike regular channel paths, PCIe feature cards must be assigned a physical channel ID (PCHID) or a virtual channel ID (VCHID) depending on the type of adapter. This assignment can be done manually and changed later using the CHPID Mapping Tool.

**Note:** HCD requires to enter a channel ID for a PCIe function but CMT perfectly overrides this value. This is a required decision.

Unlike regular and virtual channel paths, feature cards are represented by functions (or function identifiers - PFIDs), owned by the whole processor, not a logical channel subsystem. In HCD, a special dialog for managing functions of the defined types is invoked directly from the list of defined processor configurations.

The following rules should be observed when defining and configuring PCIe functions and corresponding channel IDs:

- The same channel ID may be shared by multiple function numbers if corresponding functions are defined with unique virtual function (VF) numbers. Ranges of VF numbers depend on function types; HCD provides assistance with choosing valid VF numbers in PCIe Function dialogs.
- All PCIe functions of type RoCE, RoCE-2, or ISM that are defined on the same channel ID or port, must have the same set of Physical-network-ids (PNETIDs).
- At most, one logical partition may be specified in the access list; any number of logical partitions, defined in the processor configuration, may be specified in the candidate list.
- Before a function may be configured to any logical partition in the candidate list, it needs to be moved into STANDBY mode via a CF PFID(pfid),OFFLINE system command, issued on the system, running in a logical partition in the access list (current owner). A subsequent D PCIE command should show a corresponding function (pfid) as STNBY (in the STATUS column). Then a CF PFID(pfid),ONLINE system command may be issued on the system, running in an eligible logical partition in the candidate list, to configure the function to a new owner; the STATUS column in the output of the D PCIE command, issued from this new owner, should change to CNFG.
- PCIe functions may be added dynamically to the I/O configuration. They remain in STANDBY mode as long as they are not configured to a particular logical partition.

## Specifying an I/O device number

This topic describes considerations for specifying a device number when you define an I/O device to your configuration.

You assign a device number to each device to identify it in the configuration. A device number may be any hexadecimal number from X'0000' to X'FFFF'. Each installation may have its own rules for choosing a device number. Some of the rules are discussed in this topic.

When you specify coupling facility channel path connections, HCD defines control units and devices to attach to the CF sender or peer channel. HCD assigns to each device a device number, which you can override. When assigning the device number, HCD uses the highest available number starting with FFFF and continuing in descending order. You might want to avoid assigning the higher range device numbers so they are available for HCD. In general, when operating a sysplex with a coupling facility, avoid higher range device numbers because of the way the system handles ICMF and CF sender or peer channels.

The last two digits of the device number can be the physical unit address of the I/O device. When you define a large number of I/O devices, situations might occur when it is difficult or undesirable to assign device numbers that contain the physical unit address of the device. When this occurs, you specify the physical unit address in the Unit Address field in the HCD Device / Processor Definition panel when you define a device.

You might want the same device number for two different devices across two partitions or even across processors. The devices have to be attached to different control units. To indicate whether devices identified by the same device number are the same or a different device, you can specify the serial number of the device to HCD.

For ease of tape device management, IBM recommends that you use the same device number on all systems to represent an automatically switchable device. If an automatically switchable device is a 3480 or a 3490 without the 'Read Configuration Data Capable' function, you **must** use the same device number.

## Replicating I/O device numbers

When you define more than one device with the same device type, you can have HCD assign the device numbers for these devices. You specify to HCD the device type, the initial device number for the first device, and the number of devices of that type that you want defined. HCD defines the devices in the IODF using consecutive device numbers starting with the initial device number that you specified.

## I/O device numbers for a parallel access volume

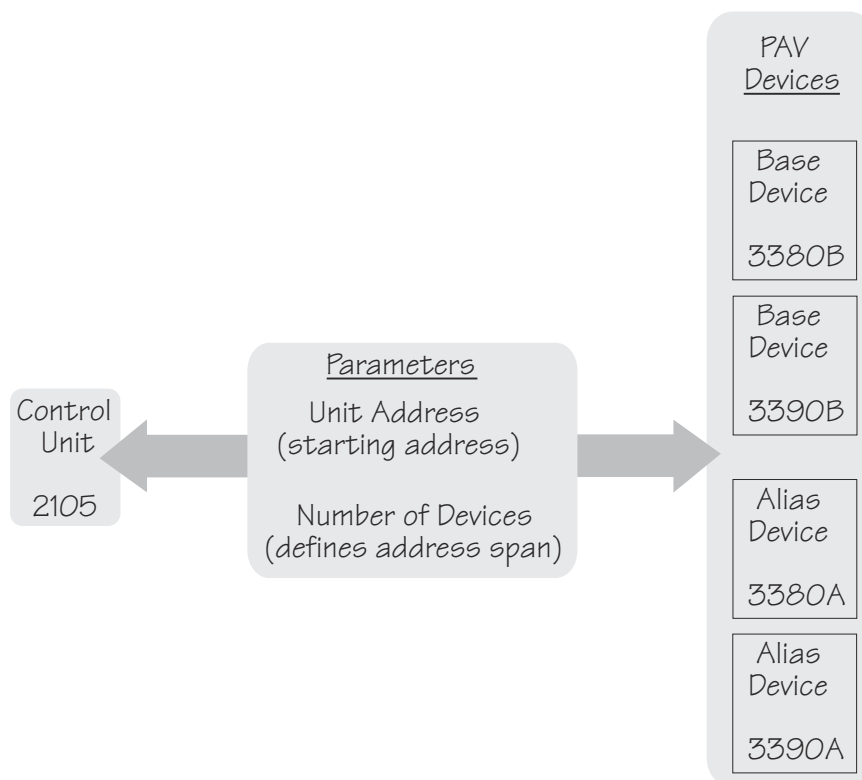
Parallel Access Volume support provides the ability for a single operating system image to drive multiple concurrent I/O requests to a single device. A parallel access volume consists of a logical base device and

associated logical alias devices. These logical devices are identified by device numbers and represented by unit control blocks (UCBs) in the system. When you request I/O to a parallel access volume, the request identifies the base UCB and the system uses the base UCB or one of its alias UCBs, depending on their availability, to initiate the request. You use HCD to define multiple device numbers for a control unit that provides parallel access volumes. Base device numbers and alias device numbers are defined independently.

A base device number is used to allocate the device, but other device numbers are needed to represent each alias UCB. The base device number is the one used when any of the following occurs:

- The device is allocated.
- The device is reconfigured with the MVS VARY command.

As shown in [Figure 9 on page 35](#), when you define a parallel access volume in HCD, you define a control unit type that provides parallel access volume capability, for example '2105'. You define the devices for the control unit with parallel access volume device types. Base devices are defined using a base device type, for example '3390B' or '3380B'. Alias devices are defined using an alias device type, for example '3390A', or '3380A'. The device numbers are associated with unit addresses on the control unit using the 'unit address' parameter, which specifies the starting unit address for the set of devices being defined. The number of consecutive device numbers and unit addresses to be assigned is specified with the 'number of devices' parameter.



*Figure 9. Control unit - parallel access volume device relationship*

The number of aliases to be assigned to each base device is determined by the parallel access volume's configuration application (ESS Specialist for 2015 and Storage Manager for newer disk storage hardware) at IPL time or at the time a base device is varied online.

HCD provides the capability to specify device numbers for alias devices that are not contiguous with the device numbers for base devices on the same control unit. This capability can be useful in helping you to migrate a string of existing control unit and device definitions to parallel access volume control unit and device definitions. In this situation, you convert the existing device numbers to the base device numbers of the parallel access volume devices. The alias device numbers can then be specified to start with a device number outside the ranges used for any existing devices. For example, you can have one control unit with 64 devices numbered 1A0 through 1DF, and a second control unit with 32 devices numbered

1E0 through 1FF. You can change the first control unit to a parallel access volume control unit type that has 64 base devices and 192 alias devices, without disrupting the second control unit.

Table 2 on page 36 shows the device numbers of the first parallel access volume control unit if you changed the starting alias device number to 21E0. Note that the device numbers for the second control unit are not shown because they are not disturbed.

<i>Table 2. Example of installation assignment of alias device numbers</i>			
Control unit	Device number	Device number	Device number
Base 1A0(00)	Alias 21E0(40)	Alias 2220(80)	Alias 2260(C0)
Base 1A1(01)	Alias 21E1(41)	Alias 2221(81)	Alias 2261(C1)
Base 1A2(02)	Alias 21E2(42)	Alias 2222(82)	Alias 2262(C2)
:	:	:	:
Base 1DF(3F)	Alias 221F(7F)	Alias 225F(BF)	Alias 219F(FF)

**Note:** Values in parentheses are unit numbers on the control unit.

Another benefit depicted in this example is that you can use four-digit numbers to identify aliases even when the base device numbers are three digits. Because most applications should not need to reference alias UCBs, applications that do not support four-digit device numbers are not affected. If your installation configuration definition lacks available three-digit device numbers and you define four-digit alias device numbers, you can migrate existing devices to parallel access volume devices without using any additional three-digit device numbers.

## Workload manager and dynamic alias management

When you define parallel access volume device numbers, you can also choose to enable or disable dynamic alias management for that device. You do this by specifying **WLMPAV=YES** or **NO** in the HCD definition. YES is the default.

When dynamic alias management is enabled, workload manager (WLM) monitors the device performance and automatically reassigns alias addresses from one base to another to help work meet its goals and to minimize IOS queueing.

Note, however, that there is no consistency checking for dynamic alias management between different systems in a sysplex. If at least one system in the sysplex specifies WLMPAV=YES for a device, then dynamic alias tuning will be enabled on that device for *all* systems in the sysplex, even if other systems have specified WLMPAV=NO. It is recommended *not* to use dynamic alias management for a device unless all systems sharing that device have dynamic alias management enabled. Otherwise, WLM will be attempting to manage alias assignments without taking into account the activity from the non-participating systems.

Note, also, that you can specify WLMPAV=YES or NO on both base and alias devices. The WLMPAV setting on an alias device, however, is only meaningful when the alias device is bound to a base device that is offline, as follows:

- If the base device is *offline*, then only alias devices with WLMPAV set to YES will be reassigned to other base devices.

The WLMPAV setting on the base device itself is irrelevant when the base device is offline, for either giving or receiving aliases. (Even if WLMPAV was set to YES on the base device, it cannot have new aliases assigned to it, as it is offline.)

- If the base device is *online*, then the WLMPAV settings on the aliases are ignored, as follows:
  - If WLMPAV is set to YES on the base device, then the aliases can be reassigned regardless of their WLMPAV settings.
  - If WLMPAV is set to NO on the base device, then no aliases can be reassigned, regardless of their WLMPAV settings.



In order for dynamic alias management to be most effective, you should try to spread out your aliases in the initial definition. If one base device has several alias devices while other base devices have none, it will take more time for WLM to reassign the aliases appropriately. Ideally, you should have at least two aliases assigned to each base at the outset.

Dynamic alias management can be globally enabled or disabled for the entire sysplex via the "Service Definition Options" panel of the WLM ISPF application. See "Defining Service Options" in *z/OS MVS Planning: Workload Management* for more information.

## HyperPAV based dynamic PAV alias management

---

If your disk storage servers support the HyperPAV License Feature and the feature is activated, you may start using HyperPAV on one or more systems at IPL time via the `HYPERPAV=YES` specification in the `IECIOSxx` parmlib member, or during normal operations via the `SETIOS HYPERPAV=YES` system command. Notice that if the command is used, it should be performed during periods of low system utilization.

HyperPAV simplifies operational procedures by removing static alias to base bindings and associating a PAV alias device in a pool of available PAV base and alias devices with any base device in a pool per an instantaneously serviced request. As soon as an I/O request serviced by a HyperPAV alias device completes, the alias immediately returns to the pool of available devices. This significantly reduces a number of I/Os, and increases I/O parallelism. HyperPAV does not require coordination throughout a sysplex because each system with access to a HyperPAV enabled storage server has the same pool of available base and alias devices. Use of HyperPAV alias devices allows to reduce their number significantly and to define many more base devices. Remember that HyperPAV alias devices and corresponding base devices are managed through the same logical control unit within the range of unit addresses from 00 through 255.

With HyperPAV active on the system, WLM stops managing PAV alias devices owned by HyperPAV enabled disk storage servers.

## Using SuperPAV mode

The HyperPAV architecture includes the concept of an *alias management group* (AMG). An AMG is a set of logical subsystems (LSS, also known as logical control units, or simply control units), each containing base and alias devices. Within an AMG, an alias device can be used for I/O to any base PAV device in the AMG.

Setting `HYPERPAV=XPAV` (also known as SuperPAV) causes z/OS to create peer relationships for LSSes that are in the same AMGs. z/OS uses a smaller grouping, known as an *AMG subgroup*, to share aliases between LSSes. An AMG subgroup consists of control units with like attributes, such as AMG number (reported by the control unit itself) and paths defined to the control units. A path is defined as the CHPID and corresponding destination link addresses (switch port) for switched paths, and the CHPID for point-to-point connections.

As with HyperPAV, when a new I/O request occurs, if the base PAV device is busy, z/OS checks to see if an alias PAV device is available for the LSS. If so, z/OS quickly binds that alias PAV device to the base PAV device and starts the I/O operation. With SuperPAV, if no alias is available in the pool for the LSS of the base PAV device, z/OS attempts to use an alias PAV device from another LSS within the AMG subgroup.

SuperPAV may provide some relief for systems that experience I/O queue time (IOSQ) during periods of peak I/O load. When a small number of aliases have been defined in an LSS, it is possible that during a heavy I/O period, no aliases might be available. z/OS may then check peer LSS alias pools to borrow an alias to start I/O requests that previously would have been left queued because no aliases were available.

**Note:** One operational aspect of aliases is that they are accessible only after an associated base device has been placed online in the control unit. For the original parallel access volume support, a base's aliases associated with it would become available only when that base volume was placed online. With HyperPAV support, all aliases in a control unit would become available once a single base in that logical control unit was placed online.

With SuperPAV support, which is a logical extension of HyperPAV support, a control unit's aliases will become available once a base in that control unit is placed online. For example, if you have one base and 255 aliases defined in a control unit, the 255 aliases will only become available once the base is placed online. If the base is varied offline aliases will not be useable.

Finally, while it may seem appealing to have control units primarily consist of aliases, the current implementation of HyperPAV and SuperPAV require that at least one base remain online in each logical control unit (CUADD) during the time that the system wants to use these aliases. This is required because path recovery operations may be necessary to re-establish paths (for example, after a signal is interrupted, or when CHPIDs are toggled offline), and those recovery operations require at least one base to be online in each control unit in order to complete successfully on their respective aliases.

Sample D M=CU(xxxx) depicting AMG's (XPAV CU Peers):

```

IEE174I 13.14.51 DISPLAY M 945
CONTROL UNIT 0690
CHP          40      42      41      43
ENTRY LINK ADDRESS 012C 012D 022C 022D
DEST LINK ADDRESS 010C 010B 020C 020B
CHP PHYSICALLY ONLINE Y      Y      Y      Y
PATH VALIDATED     Y      Y      Y      Y
MANAGED            N      N      N      N
ZHPF - CHPID       Y      Y      Y      Y
ZHPF - CU INTERFACE Y      Y      Y      Y
INTERFACE ID       0030 0230 0100 0300
MAXIMUM MANAGED CHPID(S) ALLOWED = 0
DESTINATION CU LOGICAL ADDRESS = 90
CU ND              = 002107.996.IBM.75.0000000LBN71.0030
CU NED             = 002107.996.IBM.75.0000000LBN71.9000
TOKEN NED          = 002107.900.IBM.75.0000000LBN71.9000
WWNN               = 500507630AFFD049
FUNCTIONS ENABLED = ZHPF, ZHYPERLINK(R), XPAV
XPAV CU PEERS      = 0690,06B0
DEFINED DEVICES
  09000-090EF
DEFINED PAV ALIASES
  090F0-090FF
USABLE HYPERPAV ALIASES = 16

```

## Specifying I/O device parameters and features

This topic provides information about defining a device to the operating system. You specify parameters and features of a device to the operating system in HCD, such as:

- Whether a device is considered online at IPL
- Whether a direct access storage device (DASD) is shared by other systems
- Whether a device definition can be deleted dynamically
- Whether the UCB for a device is to reside above 16 megabytes
- Whether a device is automatically switchable
- Whether a device is to be found in an additional subchannel set.

HCD displays only the parameters and features that are applicable to the device type.

## Defining whether an I/O device will be dynamic

Each I/O device type is represented by a unit information module (UIM), which is included in the product that contains the device support code. The UIM for a device specifies whether or not the device type supports dynamic configuration. If your installation includes device types that support dynamic I/O configuration, you can change your I/O configuration without performing a power-on reset or re-IPLing the system.

Using HCD, you can specify whether a device with device support code that supports dynamic is considered dynamic or not in the operating system definition. Defining a device as dynamic allows you to dynamically add, modify, and delete the device definition while z/OS is running.



A device's support code and definition determine its inclusion in one of the following categories:

- Static
- Installation-static
- Dynamic

Table 3 on page 39 describes the categories.

Table 3. Description of Device Category Capability			
Category	Description	Capability	Notes®
Static	Device with device support code that does not support dynamic.	<ul style="list-style-type: none"> <li>• Device cannot be dynamically added, deleted or modified in software configuration definition. Therefore the device is not available for use until the next IPL of z/OS.</li> <li>• Device can be added, deleted, and modified in the hardware configuration definition, but its channel path information cannot be modified.</li> </ul>	<p>Device types that do not support dynamic configuration include:</p> <ul style="list-style-type: none"> <li>• An IBM device type that z/OS does not support.</li> <li>• A device whose device type does not support dynamic configuration. See <a href="#">“Device support for dynamic configuration” on page 40.</a></li> </ul>
Installation Static	Device support code allows dynamic but is defined as DYNAMIC "No"	<ul style="list-style-type: none"> <li>• Device can be dynamically added to the software definition but cannot be modified or deleted dynamically.</li> <li>• Device can be dynamically added, deleted and modified in the hardware configuration definition, but its channel path information cannot be modified.</li> </ul>	<p>If you must delete or modify installation-static definitions, you can redefine the installation-static device to dynamic. See <a href="#">“Redefining the dynamic parameter for an I/O device” on page 40.</a></p>
Dynamic	Device support code allows dynamic and is defined as DYNAMIC "Yes"	<ul style="list-style-type: none"> <li>• Device definition can be dynamically added, deleted and modified in the software and hardware definition.</li> </ul>	<p>A device definition for a device defined as dynamic can be deleted or modified only if <b>both</b> of the following are true:</p> <ul style="list-style-type: none"> <li>• The device is offline (implies that the device is not allocated).</li> <li>• The device is not pinned. (Pinning is a technique that prevents deleting the unit control block (UCB) and related data structures of a device.</li> </ul>

**Note:**

1. When you define devices as dynamic make sure that your application programs are using UCB services that support dynamic. You can define devices as installation-static initially until you can update your affected application programs to use UCB services that support dynamic.
2. Installations that IPL with I/O definition files (IODFs) that define dynamic devices should use the IPCS subcommands FINDUCB, LISTUCB, and IOSCHECK to validate and display dynamic UCBs. Any other subcommands might not produce valid results. FINDUCB, LISTUCB, and IOSCHECK are also the subcommands to use for validating and displaying UCBs for devices that have changed from installation-static to dynamic through an ACTIVATE command.

3. Any dynamic change that causes a device's UCB to be deleted and added again, causes the device's MIH time interval to be reset to the default MIH setting for its device class. To reestablish the previous MIH interval, enter the MVS command SETIOS MIH when the dynamic change is completed. For information about this command, see *z/OS MVS System Commands*.

## Device support for dynamic configuration

To determine which devices on your system support dynamic I/O configuration, check the HCD device definition panel. If the panel indicates that the specific device can be defined as dynamic, the device supports dynamic configuration. For the most current information about device support for dynamic I/O configuration, you can also see the specific device publications.

You might need the following information about display devices and CTC connectors:

- **Display devices.** Display devices can be dynamically added or deleted, but cannot be used as multiple console support (MCS) consoles unless they are defined in the CONSOLxx member at IPL time or they are added to the console configuration in distributed mode dynamically by the SET CON system command (starting from z/OS V2R2).
- **Channel-to-channel (CTC) connectors.** CTCs can be dynamically added or deleted, but cannot be removed from global resource serialization rings, unless the CTC is managed by XCF. If so, your installation must stop XCF from using them before dynamically deleting the CTCs.

## Redefining the dynamic parameter for an I/O device

An installation-static device that is part of an I/O configuration can be redefined from installation-static to dynamic. After you redefine the device from installation-static to dynamic, you can dynamically modify or delete the device from the configuration.

When you change a device from installation-static to dynamic, its unit control block (UCB) address changes. Programs on your system that save UCB addresses will encounter problems if they attempt to use the UCB that was valid when the device was installation-static. To minimize such problems, stop the program before making the dynamic configuration change. When you restart the program after the change, the program scans for and finds the new UCB representing the device.

Redefining a device from installation-static to dynamic does not delete the storage for the original UCB. You must assess the risk of how this may affect your applications and vendor products accessing the UCB.

Modifying or deleting an installation-static device requires two separate dynamic configuration changes:

1. Change the installation-static device to dynamic device (by activating a new IODF that defines the device as dynamic.) No other device characteristics for that device can be changed on the redefinition activation.
2. Delete or modify the dynamic device (by activating another IODF that contains the appropriate changes to the device).

Using the same steps, you can also redefine a device definition from dynamic to installation-static. You can do this if you mistakenly defined a device that was supposed to be installation-static as dynamic.

The UCB for an installation-static device is accessible through the limited UCB services. For more information, see *z/OS MVS Programming: Authorized Assembler Services Guide*.

## Defining a tape device as automatically switchable

A tape device is *dedicated* when it is capable of being online to only one system at a time. The VARY ONLINE command varies the device online to the issuing system and thereafter no other system can vary the device online until the first system varies it offline. In contrast to a dedicated device, an *automatically switchable* device can be online to one or more of the systems that participate in tape sharing within the same sysplex.

Besides HCD, a tape device can be defined as automatically switchable through:

- The VARY AUTOSWITCH command

- The IEEVARYD macro
- The REMOVE DEV and RESTORE DEV command of System Automation for z/OS.

Only through HCD, however, does the definition persist beyond the duration of the IPL. Note: Although the general recommendation is to use OFFLINE YES in HCD for shared devices, this may not be applicable in all environments. For a 'shared' tape device that is auto-switchable, it may be appropriate to change to the OFFLINE NO and SHARABLE YES setting in HCD.

For devices that support automatic tape switching, the AUTOSWITCH parameter appears on the HCD Define Device Parameters / Features panel. Specify a value of either YES or NO on the AUTOSWITCH device parameter.

You might want to change the AUTOSWITCH attribute of a device, for example, if your installation needs additional devices during peak workload hours. To change a device definition from dedicated to automatically switchable, change the AUTOSWITCH parameter value from NO to YES.

When changed, the AUTOSWITCH parameter takes effect on the next IPL (the system does not check it during a dynamic software activation). To dynamically change the AUTOSWITCH parameter (that is, without an IPL), use the VARY AUTOSWITCH command.

For help in planning your use of tape devices, see [“Using automatic tape switching” on page 23](#).

## Defining whether an I/O device is read-only

You can use HCD to define devices, including Synchronous Peer-to-Peer Remote Copy secondary devices, which can be varied online in read-only mode. I/O requests to these devices are limited to search and read commands. Write commands to these devices are rejected.

A volume is read-only to the system that activates an IODF that includes this device defined as read-only. Other systems may have read-write access to this device. An operating system configuration (OSCONFIG) defines the control units and devices that are available to a system. You can use a separate OSMOD to define PPRC secondary devices as read-only 3390 or 3390B devices. The OSMOD for a production system may define PPRC secondary devices (type 3390D) into an alternate Subchannel set. To access these as read-only secondary devices from another system, a separate OSMOD is used to define these devices as 3390 or 3390B, and READ-ONLY=SEC. For example:

Example of using a separate OSMOD to define I/O devices for read-only access

Control unit	SSID	Device type	Subchannel set	Devices	OSMOD
4000	4000	3390D (256)	2	2.1000- 2.10FF	sysplex A
4001	4000	3390B (256)	0	1000-10FF	sysplex B

The READ-ONLY device attribute can be assigned to the following device types:

- 3390
- 3390B

The READ-ONLY attribute cannot be assigned to a 3390D device type because you cannot vary online a device in an alternate subchannel set.

The READ-ONLY attribute is assigned when attaching a device to an operating system. For example:

Define Device Parameters / Features				Row 1 of 7
Command ==> _____			Scroll ==> PAGE	
Specify or revise the values below.				
Configuration ID . : MVS1				
Device number . . : 3F58		Number of devices : 1		
Device type . . . : 3390B				
Parameter/				
Feature	Value +	R Description		
OFFLINE	No	Device considered online or offline at IPL		

DYNAMIC	Yes	Device supports dynamic configuration	
LOCANY	No	UCB can reside in 31 bit storage	
WLMPAV	Yes	Device supports work load manager	
READ-ONLY	No	Restrict access to read requests (SEC or NO)	<-----
SHARED	Yes	Device shared with other systems	
SHAREDUP	No	Shared when system physically partitioned	

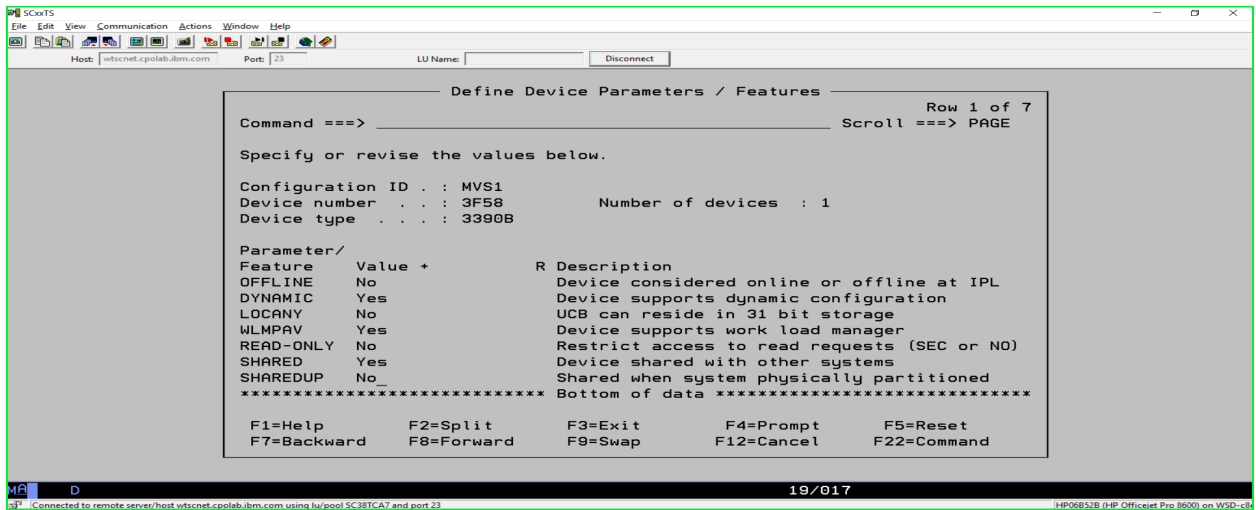


Figure 10. Define Device Parameters / Features

Regardless of how a device is defined, it must reside in the active sub-channel set so it can be varied online.

Specify one of the following values for the READ-ONLY access parameter:

- READ-ONLY = NO indicates that the device will not be accessed as read-only. If the device is a PPRC secondary it cannot vary online. *NO* is the default value.
- READ-ONLY = SEC indicates that the device is a Synchronous PPRC secondary device.

SHARED=YES or SHAREDUP=YES are mutually exclusive with READ-ONLY=SEC. ENQ and RESERVE macro requests will not issue a RESERVE channel command to a read-only PPRC secondary device.

OFFLINE(NO) is permitted with READ-ONLY devices. A read-only device can vary online at IPL.

**How the system treats a PPRC secondary defined as read-only:** A vary online request is accepted when all of the following are true:

1. The device must be a PPRC secondary.
2. The PPRC state must be full duplex.
3. The device feature that allows read access to a PPRC secondary must be enabled.

The secondary device can be in one of the following PPRC states:

#### **Full Duplex**

Read I/O requests are accepted by the device.

#### **Duplex Pending**

Read I/O requests will receive unit check status from the device. The system will redrive the I/O request once the pair is no longer duplex pending.

#### **Suspended**

Read I/O requests will receive unit check status from the device. The system will return the I/O request to the client with an error indicator.

#### **Simplex**

If the PPRC pair is terminated, the system will accept Read I/O requests as long as the device remains online.

A PPRC secondary defined as read-only cannot be included as part of a HyperSwap configuration.

#### **ENQs and RESERVEs on PPRC secondary devices:**

The ISGENQ, ENQ, and RESERVE macros issue the RESERVE channel command to request exclusive use of a shared device for the purpose of serializing access to the data held on the device. This is a problem for PPRC secondary devices because they do not allow a RESERVE channel command. A device defined as a read-only PPRC secondary cannot be defined as SHARED.

An installation must not use a SYSTEMS EXCLUSION RNL that matches a resource on the PPRC primary or secondary when the secondary is defined as read-only.

**Data set types that can be accessed from read-only devices:** not all data set types can be accessed from a read-only device. For a list of the data set types that can be accessed from a read-only device, and the access methods that support them, see [Processing data sets on read-only devices in z/OS DFSMS Using Data Sets](#). For those data sets that are supported, changes may be required by the applications that access data sets that reside on read-only devices. The operating system requires specific keywords on Batch Allocation, Dynamic Allocation, and OPEN to indicate that the application understands the new behavior. See [Table 4 on page 44](#) for a list of the required keywords and where to find more information about them.

Table 4. Keywords for accessing data sets on read-only devices		
When is access checked	How is access restricted	Where to find more information
Dynamic Allocation	DALROAC/DALROA2 test units	<a href="#">z/OS MVS Programming: Authorized Assembler Services Guide</a>

<i>Table 4. Keywords for accessing data sets on read-only devices (continued)</i>		
<b>When is access checked</b>	<b>How is access restricted</b>	<b>Where to find more information</b>
Batch Allocation	JCL DD ROACCESS keyword	<a href="#">z/OS MVS JCL Reference</a>
TSO Allocation	ROACCESS keyword on ALLOCATE command	<a href="#">z/OS TSO/E Command Reference</a>
BSAM, QSAM and EXCP OPEN	DCBE CONCURRENTRW keyword	<a href="#">z/OS DFSMS Macro Instructions for Data Sets</a>
VSAM OPEN	Based on CI size and SHROPT values	<a href="#">z/OS DFSMS Using Data Sets</a>

## Defining the location of an I/O device's unit control block (UCB)

To conserve below 16 megabyte common storage, you can consider defining a device's UCB above 16 megabytes. When a UCB is defined above 16 megabytes, programs requiring a 24-bit UCB address can still access the UCB. The system automatically captures the UCB at allocation. A captured UCB provides a 24-bit view into the above 16 megabyte UCB. A captured UCB resides in below 16 megabyte private storage for the duration of a device allocation. The captured UCB is released automatically at deallocation.

For information about accessing above 16 megabyte UCBs, see *z/OS MVS Programming: Authorized Assembler Services Guide*.

## Deciding whether to define above 16 megabyte UCBs

While captured UCBs use private storage, they are allocated in private storage only by demand. Meaning that if UCBs are defined above the 16 megabytes, then address spaces that are not interested in particular UCBs might experience a temporary shortage of virtual storage until the system releases the storage when the data is deallocated. It is more advantageous for the whole system to have UCBs defined in storage above 16 megabytes.

When you define above 16 megabyte UCBs, captured UCBs are required for certain applications, specifically those applications using data extension block (DEB)-based access methods. You can define above 16 megabyte UCBs for the applications that access them directly and for the applications that do not have private storage constraints when captured UCBs are created.

Capturing a UCB is page-oriented. Even if an address space captures only one UCB into private storage, the whole page of private storage is captured; a subsequent capture of a UCB that resides on the same page will not result in another page being captured to the address space. Other address spaces that need to capture the same UCB will have their own captured UCBs.

An exception to this would be if an address space requests a UCB to be captured to common (for example, through the macro CAPTCOM=YES) and then another address space requests a UCB on the same page to be captured to private. In this case, IOS returns to the second address space the common page address instead of the private page address. This makes sense because it is not necessary to keep multiple copies of the UCBs below 16 megabytes when they are already captured to common.

To determine the extent that you can take advantage of defining above 16 megabyte UCBs, understand whether the following situations apply to your installation. More than one case might apply depending on your installation's applications.

### Case 1

The applications can access above 16 megabyte UCBs directly (for example, if you are using VSAM and dynamic allocation with the NOCAPTURE option) and the applications do not require 24-bit addresses for UCBs.

See *z/OS Planning for Installation* for information about subsystems that support above 16 megabyte UCBs.

**Actions:**

- Define devices with above 16 megabyte UCBs.
- Use dynamic allocation indicating UCBs are not to be captured.

**Predicted Results:**

- Constraint on common storage below 16 megabytes is relieved and private storage is not affected.

**Case 2**

The applications require 24-bit addresses for UCBs (for example, you are using DEB-based access methods) and your common storage is constrained. You can define enough above 16 megabyte UCBs to cause the private storage area to expand into the next megabyte (alleviating private storage constraint).

You can estimate whether you can define enough above 16 megabyte UCBs to cause the private storage area to expand into the next megabyte. At system initialization, the system rounds the amount of common storage to the next megabyte to create a megabyte boundary between below 16 megabyte common and private storage areas. You request common storage with the SQA and CSA parameters. To determine whether the private storage area will expand to the next megabyte, determine the amount of storage used for rounding and subtract it from one megabyte as shown in the following calculation:

```
1 MB - (actual CSA - requested CSA)
```

**actual CSA - requested CSA**

The amount of rounded storage that was allocated to create a megabyte boundary. Determine this amount by subtracting the amount of CSA requested with the CSA parameter in parmlib from the actual amount of CSA present in the system after IPL. You can determine the amount of actual CSA by viewing the RMF Monitor III common storage remaining table.

The result of this calculation is the amount of requested CSA as opposed to rounded CSA. If the amount of UCB storage you are moving above 16 megabytes is greater than this value, you have captured enough UCBs to cause the private storage area to expand to the next megabyte. If the amount is less than this value, see cases 3 and 4.

When determining the amount of UCB storage you are moving above 16 megabytes, remember that the size of a UCB is dependent on the device type. For example, a average UCB defined below 16 megabytes has approximately 200 bytes below 16 megabytes. The size of the prefix extension is not included because it already exists above 16 megabytes.

**Action:**

- Define devices with above 16 megabyte UCBs.

**Predicted results:**

- Constraint on common storage below 16 megabytes is relieved and private storage expanded to the next megabyte so it is not constrained. There is room for the captured UCBs that the applications need.

**Case 3**

Some of your applications require 24-bit addresses for UCBs and your common storage is constrained. You cannot define enough above 16 megabyte UCBs to cause the private storage area to expand into the next megabyte and private storage is not currently constrained. Other applications in your installation might have enough room for the captured UCBs that they require or might not require captured UCBs.

**Action:**

- Be cautious about defining any above 16 megabyte UCBs. Capturing UCBs might cause your private storage to become constrained. There must be enough room in your private storage for captured UCBs for the application.

**Predicted results:**

- Some constraint on common storage below 16 megabytes is relieved.



- If you limited the number of above 16 megabyte UCBs, your private storage is not constrained. You might choose to move the UCBs for certain applications because there is room for the captured UCBs that they require. When trying to make this decision, remember that the same UCBs might be accessed by more than one application.

## Case 4

Some of your applications require 24-bit addresses for UCBs and your common storage is constrained. You cannot define enough above 16 megabyte UCBs to cause the private storage area to expand into the next megabyte and private storage is constrained.

### Action:

1. Try to relieve private storage constraint by moving as much data as possible to above 16 megabyte private storage.

For example, the BSAM, QSAM, BPAM, and BDAM access methods allow data areas to be located above 16 megabytes. This support includes allowing the caller to issue most SAM, PAM, and BDAM macros in 31-bit addressing mode regardless of whether the data is above or below 16 megabytes. See *z/OS DFSMS Macro Instructions for Data Sets* for more information.

Also, if you are using VSAM to allocate devices, you can use the NOCAPTURE option when you dynamically allocate devices so UCBs are not captured.

2. Try to have private storage expand to the next megabyte by changing the CSA and SQA initialization parameters.

The system rounds the amount of common storage to the next megabyte to create a megabyte boundary between the below 16 megabyte common and private storage areas. You request common storage with the SQA and CSA parameters in the IEASYSxx parmlib member.

Determine the amount to reduce the CSA/SQA parameter values to force private storage to the next megabyte using the following calculation:

```
(1MB - (actual CSA - requested CSA)) - storage savings
```

### actual CSA - requested CSA

The amount of rounded storage that was allocated to create a megabyte boundary. Determine this amount by subtracting the amount of CSA requested with the CSA parameter in parmlib from the actual amount of CSA present in the system after IPL. You can determine the amount of actual CSA by viewing the RMF Monitor III common storage remaining table.

### storage savings

The amount of common storage saved by moving UCBs above 16 megabytes. If you have already moved the UCBs, you can look at the actual storage numbers before and after moving UCBs to determine the savings or you might choose to estimate the amount you will save and then make any changes as necessary. The size of a UCB is dependent on the device type. For example, a DASD UCB defined below 16 megabytes has approximately 128 bytes below 16 megabytes. The size of the prefix extension is not included because it already exists above 16 megabytes.

Remember that you need to reserve SQA/CSA storage for the current workload as well as for future expansion. Make sure that you include that estimate when you request common storage below 16 megabytes with the CSA and SQA parameters. For more information about the parameters, see *z/OS MVS Initialization and Tuning Reference*.

3. Continue to define below 16 megabyte UCBs. Do not define any above 16 megabyte UCBs.

### Predicted results:

One of the following:

1. You were able to reduce private storage constraints enough to capture the UCBs as necessary for the application.
2. You were able to tune the CSA and SQA parameters to expand to the next megabyte.
3. You decided not to define above 16 megabyte UCBs for this application.

## Case 5

You are adding new devices to your installation, for example, a string of 3390 devices, and you are concerned about below 16 megabyte common and private storage constraints.

### Action:

- Define as many UCBs above 16 megabytes as possible to prevent below 16 megabyte common or private storage from becoming constrained.

Define enough above 16 megabyte UCBs to prevent below 16 megabyte common storage from expanding into the next megabyte segment when the IODF with the additional device definitions is used at the next IPL. For example, if only a small amount of below 16 megabyte common storage is used to round CSA to the next megabyte boundary, additional UCBs might cause common storage to expand into the next megabyte. This situation could be a problem if your private storage is constrained because of the expansion of common storage into what otherwise would be private storage. Prevent this problem by defining above 16 megabyte UCBs; however, be aware that some private storage might be used for captured UCBs depending on your applications.

### Predicted results:

- Constraint on common below 16 megabyte storage is not adversely affected by the addition of the new devices.

## Defining an above 16 megabyte UCB

You can use HCD to define a device's UCB above 16 megabytes if the device's unit information module (UIM) indicates that the device support code enables above 16 megabyte UCBs. If the device support code supports above 16 megabyte UCBs, the LOCANY parameter appears on the HCD Define Device Parameters / Features panel. Specify a value for the LOCANY device parameter to either:

- Define a device's UCB below 16 megabytes only (LOCANY is No). The UCB cannot reside in 31-bit storage.
- Define a device's UCB above 16 megabytes (LOCANY is Yes). The UCB can reside in 31-bit storage.

The default for LOCANY ( if it is not specified by the UIM) is No. This can be overwritten by including the option `OS_PARM_DEFAULT = LOCANY,YES` in the HCD profile.

You can dynamically change the definition of a UCB. To dynamically change a definition from below 16 megabytes to above 16 megabytes, change the LOCANY parameter value from "No" to "Yes" and activate the new IODF in software-only mode.

## Defining allocation preferences

---

This topic gives background information about I/O device allocation, which you need to understand before defining the EDT and esoteric device groups in your configuration.

You can control the allocation preferences for I/O devices using HCD. First, you must understand how devices are allocated for jobs in z/OS.

Decisions made by system allocation and/or DFSMS depend on definitions of devices, as well as their physical and logical grouping when established using HCD. See *Data set resources - allocation in Iz/OS MVS JCL User's Guide* for additional information about device allocation for both SMS and non-SMS managed data sets.

For use by catalog support, HCD provides automatic or manual assignment of esoteric tokens that become look-up values during catalog operations.

## Understanding I/O device allocation in z/OS

When you submit a job, you identify I/O devices required by the job. The device information can be obtained from either a catalog, SMS overrides, or specific UNIT parameters on DD statements. Before the job can continue execution, z/OS must allocate all those devices to the job.

There are three ways to specify device allocation for a job using UNIT parameters on DD statements. On the UNIT= parameter, specify one of the following:

- A specific device number
- A generic device type
- An esoteric device group

## Indicating a specific device for allocation

To request a device explicitly for a job, specify a device number on the UNIT= parameter or on the corresponding dynamic allocation parameter. If that device is available, z/OS allocates the device to the job. However, if the device is unavailable (for example, allocated to another job), your job must wait until the device is available for allocation.

## Specifying a generic device type for allocation

z/OS logically groups device types with similar characteristics and assigns the group a generic name. Such a group is called a generic device type. z/OS, for example, groups the 3330-1, 3330-2, and 3333-1 into a generic device type named 3330. Any time a program allocates a 3330, z/OS interprets it to mean any of the devices in that generic device type.

To request a device allocation, you can specify a generic device type on the UNIT= parameter. z/OS allocates a device from the specified generic device type. For example, if you code the following DD statement:

```
//OUTPUT DD UNIT=3330,...
```

z/OS allocates a device from generic device type 3330.

If you specify a device number, such as 3330, that may be mistaken for a unit device type, precede the device number with a slash.

For example, if you code the following DD statement:

```
//OUTPUT DD UNIT=/3330,...
```

z/OS allocates the device that has the device number 3330.

**Note:** An esoteric device name must not contain a slash (/).

For more information, see the UNIT= parameter description in *z/OS MVS JCL Reference*.

## Specifying an esoteric device group for allocation

A job that specifies an *esoteric device group* is requesting z/OS to allocate a device from that group. An esoteric device group can include devices of different generic device types. All of the devices that you assign to an esoteric device group must be of the same device class with the following exception: you can define esoteric device groups that contain devices from both DASD and tape device classes but this is not recommended.

Devices belong to one of the following classes:

- Channel-to-channel adapters
- Communication devices
- Direct access devices
- Display devices
- Character readers
- Tape devices
- Unit record devices

To request device allocation, you can specify an esoteric device group on the UNIT= parameter. For instance, DASD and TAPE are group names that identify a group of devices eligible for allocation to satisfy a UNIT=group request (for example, UNIT=DASD, or UNIT=TAPE on the DD JCL statement).

z/OS uses the eligible device table (EDT) to determine the set of devices associated with the esoteric device group. [Figure 11 on page 50](#) gives an example of relationships among generic and esoteric device groups.

Generic Device Types	3800	3490	3380					3390				
Esoteric Group Name	(1)	TAPE(2)		SYSDA (3)					DA1 (4)			DA2(5)
Device Number	131	151	152	181	182	183	184	190	191	192	193	194

*Figure 11. Relationships among generic and esoteric device groups*

**Note:**

1. The absence of an esoteric group name means that you can request the 3800 as UNIT=3800, or specify the specific device number, 131.
2. TAPE is the esoteric group name for the two 3490 tape drives, with device numbers 151 and 152.
3. SYSDA is the esoteric group name for two 3380s (device numbers 183 and 184) and five 3390s (device numbers 190-194). When UNIT=SYSDA appears on a DD statement, units 183, 184, 190, 191, 192, 193, and 194 are eligible devices.
4. DA1 is the esoteric group name for two 3390 DASDs (device numbers 191 and 192).
5. DA2 is the esoteric group name for a single 3390 DASD (device number 193). When DA2 is coded on a DD UNIT parameter, device number 193 is the only device eligible for that allocation request.

When z/OS allocates a tape device to a job, it serializes access to the specified esoteric device group until the allocation request is satisfied. Only the devices that belong to the specified esoteric device group are unavailable for allocation to other jobs. When the tape device is automatically switchable, all other automatically switchable devices of that generic device type are unavailable for allocation to other jobs during device selection. Referring to [Figure 11 on page 50](#), assume that TAPE151 is device 151 and TAPE152 is device 152 and that both devices are automatically switchable. If one jobstep requests UNIT=TAPE151 and during the selection process another jobstep requests UNIT=TAPE152, the system does not consider TAPE152 to be eligible for the second jobstep. This action occurs because both TAPE151 and TAPE152 are generic type 3490 and are automatically switchable.

**Required esoteric device groups**

A number of procedures in the IBM-provided SYS1.PROCLIB refer to the esoteric names SYSDA or SYSSQ. If your installation uses these procedures, you must define these esoteric device groups to HCD.

The group named SYSSQ must include only tape devices or only direct access devices. The group named SYSDA must include only direct access devices.

In addition, your installation might use other cataloged procedures that also refer to these or to other esoteric names. To determine which esoteric groups your installation uses, check the UNIT= parameter on the cataloged procedure DD statements.

## Specifying order in an esoteric with the device preference table

An esoteric device group can include devices of more than one generic device type. When z/OS attempts to allocate a demountable device, a unit record, or a printer from an esoteric device group, it turns to the device preference table that defines the order in which to attempt the allocation. The system uses the table to serialize its selection of those devices.

HCD provides a predefined device preference table that defines the generic device types and lists them in order of performance. (The first device type on the list is the fastest. The last device type on the list is the slowest.) You can use the default device preference table values for a generic or you can specify a different value to change the allocation order.

For tape requests, the system considers many factors: the type of request, the devices eligible to satisfy the request, and the characteristics of each eligible device. Based on these factors, the system selects the optimal device to allocate. For non SMS-managed tape devices, z/OS allows users to participate in the selection process through the use of SSI function code 78. For details on how to use function code 78, see *z/OS MVS Using the Subsystem Interface*.

### Related information:

- For the most current information about device support, see the specific device information or use the "Query supported hardware and installed UIMs" option on the HCD primary task selection panel.
- For information about printing reports through HCD and an example of the Supported Hardware report, see *z/OS HCD User's Guide*.

## Advantages of specifying an esoteric device group

By requesting a specific device (for example, UNIT=570), you limit z/OS to a choice of only one device, thereby decreasing the probability that the device will be available when the job needs it. In contrast, by requesting a generic device type, you can allow z/OS a choice of several devices, thereby increasing the probability that a device will be available when the job needs it. Of course, this increase in probability assumes that there will be more than one device of that generic type available for allocation.

When you request a generic device type, z/OS serializes access to that generic device type. This means that z/OS does not allocate devices from that generic device type to other jobs until z/OS satisfies your jobstep allocation request. Because z/OS makes the entire generic device type unavailable for allocation to other jobs, there might be a delay in satisfying other jobs' allocation requests. Therefore, requesting a generic device type increases the probability that there will be a delay in satisfying allocation requests for other jobs. However, waiting for a generic device type generally takes much less time than waiting for a specific device.

Assuming that the esoteric device group identifies more than one device, a device will more likely be available for a UNIT=TAPE request, for example, than if the request was for a specific device. Also, if you assume that the esoteric device group does not contain all of the devices from any one generic device type, devices from each generic device type might still be available for allocation to other jobs while z/OS serializes access to the esoteric device group.

To summarize how the system handles the different UNIT specifications, here are three examples. The first two examples describes dedicated devices and the third describes automatically switchable devices.

*The first example* compares the likelihood of the system being able to satisfy the following specific and generic device requests:

- UNIT=270
- UNIT=3480, where the devices are defined at addresses 270, 273, 285, 294, 366, and 414.

In this case, it is more likely the request can be satisfied by any of the six devices eligible with the UNIT=3480 request than with the UNIT=270 request.

*The second example* shows how you can subdivide devices into two esoteric specifications so that two jobs can have similar device requests satisfied at the same time. The devices are defined as follows:

- TAPE1 is 270, 273, and 285
- TAPE2 is 294, 366, and 414.

In this case, jobs that request TAPE1 can be in allocation at the same time as jobs that request TAPE2.

*The third example* is the same as the second example and the UNIT specifications are the same; however, all devices are automatically switchable. In this case, jobs that request TAPE1 and jobs that request TAPE2 cannot be in allocation at the same time. The second job will have to wait for the first job to complete allocation. This will be true whether the jobs are on the same system or on different systems.

When the tape device is automatically switchable, all other automatically switchable devices of that generic device type are unavailable for allocation to other jobs during device selection.

## **Holding or releasing resources while a job waits**

Assuming that you are not using JES3 pre-execution setup, to make best use of device allocation, you must decide whether the system should hold or release resources (non-sharable devices and volumes) while a job waits for those resources. When the operator requests that allocation for a specific job is to wait for resources, the system issues a message that asks the operator to reply with either HOLD or NOHOLD.

### **HOLD**

The system holds non-sharable devices and volumes already allocated to the job. Select this option if the needed resources are constantly being freed, and allocation requests for other jobs will probably not be held up by the requests made for this job. This job can hold up other requests in either of two ways:

1. The job has already allocated units needed for another job.
2. The job is waiting for devices to which z/OS is controlling access through serialization.

### **NOHOLD**

The system releases non-sharable devices and volumes already allocated to the job. Select this option if the needed resources may not be freed for some time, and allocation requests for this job are likely to hold up allocation requests issued for other jobs.

Requests for dynamic allocation are not held up by requests waiting for batch allocation, even though the jobs awaiting batch allocation are holding resources.

A dynamic change can be held up from completing if allocation is waiting for a response. For information about automating responses to allocation messages, see *z/OS MVS Installation Exits*.

## **Device preference table's effect on UNIT=AFF request**

When a job requests unit affinity, the order of devices in the device preference table can affect allocation. (See [Figure 12 on page 53](#).) The lower a device's preference value, the higher its priority. Device preference values affect allocation whenever a DD requests unit affinity to another DD that has requested allocation to an esoteric device group and both DDs specify a status of NEW. When this situation occurs, z/OS allocates both DDs to the same physical unit. That unit:

- Will belong to the specified esoteric device group
- Will have the lowest device preference value from that esoteric device group to appear in the device preference table

**Conditions:**

- Your installation has previously defined an esoteric device group and named it TAPE. Device types 3400-3, 3400-5, and 3480 belong to the group named TAPE.
- Your installation is using the IBM-provided device preference table. In that table affected device types appear with the following device preference values:

Types	Values
3480	1100
3400-5	1200
3400-3	1210

- Assume the following JCL statements:

```
//JOB1 JOB .....
//STEP1 EXEC .....
//DD1 DD DISP=NEW,UNIT=TAPE,.....
//DD2 DD DISP=NEW,UNIT=AFF=DD1,.....
.
.
//
```

**Explanation:**

- DD1 requests z/OS to allocate a device from the esoteric device group TAPE.
- DD2 requests affinity to DD1.
- z/OS allocates DD1 and DD2 to the same physical unit. That unit will be a 3480.

*Figure 12. Example of Device Preference Table Affecting UNIT=AFF*

Device preference values also affect the unit-affinity-ignored unit name, that is, the UNITAFF parameter in the ALLOCxx parmlib member. If the installation does not specify UNITAFF, the system default is the tape generic highest in the device preference table. For more information, see the ALLOCxx UNITAFF parameter in *z/OS MVS Initialization and Tuning Reference*.

See [Figure 13 on page 54](#) for an example.

**Assumptions:**

- UNITAFF was not specified in ALLOCxx
- The SMS ACS routines are defined so that:
  - Data set L is to be redirected from tape to an SMS-managed DASD volume, SD3
  - Data set M is not to be redirected and is, therefore, still intended to go to a non-SMS-managed tape volume
- Your installation is using the IBM-provided device preference table. In that table the affected device types appear with the following device preference values:

Types	Values
-------	--------

<b>3490</b>	1000
-------------	------

<b>3480</b>	1100
-------------	------

- Assume the following JCL statements:

```
//JOB2 JOB .....
//STEP1 EXEC .....
//DD11 DD DSN=L,DISP=(NEW),UNIT=3480,.....
//STEP2 EXEC .....
//DD21 DD DSN=L,DISP=OLD,.....
//DD22 DD DSN=M,DISP=(NEW,CATLG),UNIT=AFF=DD21
```

**Explanation:**

- In STEP1, DD11, data set L is created and cataloged on SD3, SMS-managed DASD (redirected using SMS ACS routines).
- In STEP2, DD21, data set L is an existing data set, cataloged on SD3, SMS-managed DASD. DD21 is both the referenced DD (referenced by the UNIT=AFF on DD22) and the primary DD.
- In STEP2, DD22 is the referencing DD, which requests unit affinity to DD21. Because data set L is on SMS-managed DASD, the system cannot honor the unit affinity for DD22, which is intended to go to tape. With the unit affinity ignored, the system must determine a unit to be used for DD2. Because UNITAFF was not specified in ALLOCxx, UNITAFF will default to 3490 because it is the tape generic highest in the device preference table. DD22 will be allocated to a 3490.

*Figure 13. Example of Device Preference Table Affecting the Default Unit-Affinity-Ignored Unit Name*

**Note:** In a JES3 environment, the IBM-supplied device preference table defines 3480X devices with a higher priority than 3480 devices. Do not alter this priority, because, if you do, the system does not honor a request for affinity between the two device types. A job that requests data set affinity between 3480X and 3480 devices will fail when the installation has specified a higher preference for the 3480 devices.

## Defining device allocation in HCD

You use HCD to define esoteric device groups and specify the device preference values of generics within esoteric device groups. You do this by defining eligible device table (EDT) information using HCD.

Information about device allocation is collected in an EDT for z/OS. An EDT is an installation-defined and named representation of the devices that are eligible for allocation. The EDT also defines the esoteric and generic relationships of these devices.

During each IPL, or during a dynamic configuration change, your installation identifies the EDT that z/OS is to use. During an IPL, you identify the EDT in the LOADxx member. See [Chapter 3, “Specifying an I/O configuration at IPL,”](#) on page 67 for a description of the LOADxx member. During a dynamic configuration change, you identify the EDT on the HCD Activate New Configuration panel or on the



ACTIVATE command. Jobs that run after the IPL or dynamic change can request device allocations from any of the esoteric device groups assigned to the selected EDT.

Your installation can define multiple EDTs in each I/O definition file (IODF). For each I/O configuration, you can define:

- One EDT with no changes to the device preference table
- One EDT with changes to the device preference table
- Multiple EDTs with or without changes to the device preference tables

You define each EDT with a unique identifier in HCD.

**Note:** In a JES3 environment, JES3 supports only one EDT per I/O configuration. If a JES3 installation defines more than one EDT in a configuration, JES3 will support only the first EDT defined.

Each EDT definition can include:

- Definitions for one or more esoteric device groups (See [“Defining esoteric device groups in an EDT using HCD”](#) on page 55.)
- Changes to the device preference table (See [“Changing the device preference table order”](#) on page 55.)
- Names of the generic device types you want to make eligible for VIO (See [“Defining devices as virtual I/O \(VIO\) eligible”](#) on page 56.)

You can use HCD to view the configuration data in an EDT. Programs can view information from the currently active EDT using the EDTINFO macro. See *z/OS MVS Programming: Assembler Services Reference ABE-HSP*.

## Defining esoteric device groups in an EDT using HCD

Use HCD to define an esoteric group, assign the group a name, and identify the I/O devices that you want included in the group. The name you assign to an esoteric device group is called the esoteric name. To request allocation of a device from an esoteric device group, specify the esoteric name on the UNIT= parameter of a JCL DD statement.

In JCL terminology, an esoteric name is called a *group name*.

Within a given EDT, no two esoteric device groups can have the same name. An esoteric device group in one EDT, however, can have the same name as an esoteric device group in another EDT.

Do not use esoteric names **SYSALLDA**, **SYS3480R**, or **SYS348XR**, which are reserved for use by IBM.

IBM recommends that you define esoteric tokens for each installation-defined esoteric group. Esoteric tokens are copied to catalog entries created for new or recataloged data sets by using either IDCAMS or IEHPROGM.

For more information, see [“Considerations for esoteric tokens”](#) on page 56.

## Changing the device preference table order

The device preference table defines the order of devices that z/OS uses to satisfy an allocation request. To change the device order that z/OS is to use when attempting to satisfy an allocation request, use HCD to define a new preference table order as part of a new EDT definition in the IODF. In the device preference table, devices with lower preference values have higher priority. If the allocation is unsuccessful, z/OS continues the attempt following the order specified in the IBM-provided device preference table.

When you define a device, HCD automatically defines the generic device type in the EDT. You can use HCD to view the generics defined in an EDT. For each generic in an EDT, you can specify an installation device preference table value to specify the order the generic is allocated within an esoteric or you can keep the IBM default device preference value.

## Defining devices as virtual I/O (VIO) eligible

VIO refers to data set allocations that exist in paging storage only. z/OS does not use a real device unless z/OS must page out the data set. If z/OS must page out the data set, z/OS writes it to a paging device. Programs that use VIO data sets access them just as if the data sets were allocated to a real I/O device.

You can allocate only temporary data sets to VIO. To request a VIO allocation, the UNIT= parameter on your DD statement must specify an esoteric device group or generic device type that is eligible for VIO. *z/OS MVS JCL Reference* and *z/OS MVS JCL User's Guide* explain, in detail, how to make the request. Those books also explain the conditions that must be met before z/OS satisfies a VIO allocation request.

You use HCD to identify the esoteric device groups or the generic device types that you want to be eligible for VIO allocation. z/OS will allocate only DASD for VIO. Therefore, any group that you identify must contain at least one DASD.

You can identify one or more *direct access* generic device types that you want to make eligible for VIO.

## EDTs for dynamic configuration

Some dynamic configuration changes that you can make to an EDT are:

- Changes to esoteric groups
- Changes to the device preference table values for generics, which determines the order in which devices are allocated from an esoteric group

These dynamic configuration changes could be used to define an IODF with the same hardware configuration but with a different ID for the EDT. The different ID for the EDT allows an installation to activate a configuration with a different device preference order and different esoteric device groups for different jobs, such as off-shift work. Other dynamic configuration changes that affect the EDT are:

- Adding devices, including appropriate new generic names
- Deleting devices
- Modifying devices, which results in deleting then adding the same device numbers (Message IOS502I reports the deleted and added device.)

A dynamic configuration change causes z/OS to activate a new EDT definition.

### Primary and secondary EDTs

Usually, z/OS uses one eligible device table (EDT) to process allocation requests. However, when you dynamically change your system's software I/O configuration definition, z/OS must use two EDTs to process the change:

- The **primary EDT** processes all current and new allocation requests. z/OS runs with only the primary EDT until you make a dynamic configuration change. z/OS then activates a new primary EDT for the new I/O configuration, which makes the old primary EDT the secondary EDT.
- The **secondary EDT** receives no new allocation requests. The system deletes the secondary EDT when it finishes the allocation requests issued before the dynamic configuration change.

A second activation may fail if the previous activation is not finished because work is still accessing the secondary EDT.

## Considerations for esoteric tokens

At allocation time, the system needs to identify devices eligible for processing allocation requests: static by using DD statements or dynamic by programmatically, using the DYNALLOC macro. During this process, the system uses either direct or indirect specifications of devices.

A direct device specification is done by the UNIT parameter on a DD statement or by a corresponding text unit passed to DYNALLOC. If the UNIT does not point to a device by a device number, the UNIT appears to be either a generic device name or an esoteric device name.

An indirect device specification comes from a data set catalog entry in the form of a special four-byte token. Tokens in a catalog entry get their values from the method used to create the entry:

- If the catalog entry is the result from a direct device specification with the disposition of CATLG, a token is a four-byte device type of the corresponding device.
- If a catalog entry is the result from the DEFINE NONVSAM or IMPORT CONNECT command of the IDCAMS utility or the CATLG control statement of the IEHPROGM utility, the system will use tokens from the EDT.

A found value (a UNIT name or token) is called a look-up value (LUV). The system uses look-up values for search in the LUV section in the EDT. This section is generated by HCD, following actual device definitions in the corresponding operating system configuration. Each entry in the LUV section contains two look-up search keys: a device name (generic or esoteric) and a corresponding four-byte name token.

If a matching entry is found in the LUV section, the system extracts an index of the first (or only) generic entry in the generic section in the EDT. A generic entry represents all devices for a given generic device type. Devices in the EDT groups are referenced by their corresponding group entry and indicate that the system needs to proceed choosing devices from the identified groups of devices.

If an LUV is a generic/esoteric name, the location of a matching entry in the LUV section in the EDT does not matter. However, if an LUV is a special token from the catalog, an installation must guarantee that the entry found in the LUV section matches a four-byte name token in the located entry with the LUV from the catalog, pointing it to a device groups of a proper device type.

For generics, the name tokens in LUV entries in the EDT are four-byte device types that are found in unit control blocks (UCBs) in IOS.

For esoterics, the name tokens are generated by HCD and consist of two parts: a two-byte esoteric token and a two-byte device class. In a special case, such an esoteric representing disk and tape devices, a two-byte device class is a combination of the disk and tape device classes (hexadecimal A000).

When HCD is asked to create an esoteric, a corresponding entry panel provides an option to specify a unique esoteric token as a decimal combination of four digits in the 0-9 range that will be saved as a two-byte hexadecimal value. If you do not enter a value for an esoteric token, HCD generates it in the default ascending alphanumeric order of all defined esoterics. If a name of a new esoteric happens to be inside of the default ascending alphanumeric order, its default esoteric token will force recalculation of esoteric tokens for existing esoteric entries in the LUV section in a new/updated EDT. In the event of activation of this EDT via dynamic I/O configuration or IPL with the containing IODF, such a situation may result in choosing a wrong entry in the LUV section in the EDT when using an LUV from the catalog.

**Example 1:** In the past, an installation defined two esoterics: DISK for 3390 devices and TAPE for 3490 devices. Whereas, HCD created FIVE esoterics in this case:

DISK	(default token 0001),	EDT Lookup value 00012000
TAPE	(default token 0002),	EDT Lookup value 00028000
SYS348XR	(default token X'270D' or 9997),	EDT Lookup value 270D8000
SYS3480R	(default token X'270E' or 9998),	EDT Lookup value 270E8000
SYSALLDA	(default token X'270F' or 9999),	EDT Lookup value 270F2000

**Example 2:** Esoteric tokens are generated according to ascending alphanumeric order of explicitly defined esoteric names DISK and SYSDA. Default esoterics always receive maximum values as shown in example 1. Now, the installation wants to add a new esoteric, named ATL, for 3590 devices in a new tape library. In absence of explicitly defined tokens, ATL becomes the first esoteric in the alphanumeric order, causing HCD to reassign the default tokens as follows:

ATL	(default token 0001),	EDT Lookup value 00018000
DISK	(default token 0002),	EDT Lookup value 00022000
TAPE	(default token 0003),	EDT Lookup value 00038000
SYS348XR	(default token X'270D' or 9997),	EDT Lookup value 270D8000
SYS3480R	(default token X'270E' or 9998),	EDT Lookup value 270E8000
SYSALLDA	(default token X'270F' or 9999),	EDT Lookup value 270F2000

**Example 3:** If a catalog entry for a disk data set was created by IDCAMS before adding the new esoteric, the token in it would contain 00012000. With the EDT updated with the new esoteric, an attempt to allocate the existing data set using its catalog entry will fail due to no matching entry.

The problem could have been avoided if the following esoteric tokens were used in the installation:

DISK	-	token 0100,	EDT Lookup value 00642000
TAPE	-	token 0200,	EDT Lookup value 00C88000
SYS348XR	-	token 9997,	EDT Lookup value 270D8000
SYS3480R	-	token 9998,	EDT Lookup value 270E8000
SYSALLDA	-	token 9999,	EDT Lookup value 270F2000

If you add an esoteric ATL with token 3000, it will have the following result with no impact to existing esoterics.

ATL	-	token 0300,	EDT Lookup value 012C8000
-----	---	-------------	---------------------------

With a unique esoteric token, the allocation of an existing data set will resolve to a proper device group. The examples illustrate how esoteric tokens might be selected if you choose their values in ranges that allow possible inserts. IBM strongly recommends that you use esoteric tokens.

## Migrating to subchannel sets

In an IBM Z environment you can define one or more alternate subchannel sets with ID 1 and up (depending on the processor type) in addition to the existing primary subchannel set (SS0) in a logical channel subsystem. This ability relieves the constraint for the number of devices that can be accessed by an LPAR. You can define parallel access volume (PAV) alias devices (device types 3380A, 3390A) as well as special devices (3390D and 3390S) into an alternate subchannel set. In SS0, you can place 63.75K devices, and in each additional subchannel set, you can place 64K devices of eligible device types. Device numbers can be duplicated across subchannel sets. See [Figure 5 on page 18](#).

Alias devices that are currently in subchannel set 0 (SS0) can be moved into one of the defined alternate subchannel sets through your normal dynamic configuration change method. After all changes are made to the IODF and it is active on the IBM Z processor, you have successfully reassigned your alias devices from SS0 to the alternate subchannel set. Doing so frees the device numbers moved to the primary alternate subchannel set in the primary subchannel set. Next, define more physical volumes to SS0.

Note that the logical and physical device unit addresses assigned to a device on a control unit must be unique; you cannot define the same CU/device unit address to a device in both multiple subchannel set, for example the primary subchannel set (SS0) and the first alternate subchannel set (SS1). For example, if you want to define the PAV base and alias devices in the range 8000-807F in different subchannel sets, but on the same control unit, you can define the devices as follows:

- Base devices, range 8000-807F in SS0, unit address 00-7F (CU number 8000)
- Alias devices, range 8000-807F in SS1, unit address 80-FF (CU number 8000).

## Example of migrating devices between subchannel sets

This topic shows a possible approach for organizing your PAV base and alias devices in two different subchannel sets:

- [“Numbering schemes” on page 59](#) introduces some methods for organizing device numbers and unit addresses of the devices.
- [“Using HCD to move alias devices into a different subchannel set and closing the gaps in the device number range” on page 63](#) shows how to use HCD to move PAV alias devices from SS0 to SS1, applying one of the discussed numbering schemes to fill the numbering gaps.

To use the information in this section, you must understand PAV and HyperPAV technology, and how to select an appropriate ratio between base and alias devices. Also be aware that the described consolidation of device ranges does not consider any involved migration of data. For this purpose, various approaches are available, such as DFSMSdss, TDMF, or zDMF.

Further, an understanding of the following topics would be helpful in migrating devices between subchannel sets:

- Availability of free device ranges within the existing 64K channel subsystem limit
- DASD capacity planning detail for a period of 5 years or longer
- Logical Subsystem alignment of existing and future disk subsystems
- Disk subsystem support of new technology (for example, HyperPAV)
- Performance profile of disk subsystems
- DASD replication requirements.

## Device number alignment

For base and alias devices, no correspondence is needed between device numbers in the two subchannel sets. For example, device number 8000 in subchannel set 0 (SS0) and device number 8000 in subchannel set 1 (SS1) can be completely separate devices.

Typically, you define base devices (for example, device type 3390B) from the start of the unit address range (unit address 00 forwards) and define alias devices from the last device in the range backwards. If the available unit address range is completely filled, this becomes unit address FF backwards.

Unit addresses of base and alias devices on a single control unit must be unique; they cannot be duplicated across subchannel sets. Also, base devices and their related alias devices must be defined on the same control unit.

## Numbering schemes

Several numbering schemes are possible, each of which is suitable for specific circumstances. Thus, the approach you select depends on your environment and requirements. Also, different implementations of PAV devices might restrict the alignment of alias addresses within the range. Check this with your disk storage vendor before selecting a numbering scheme.

This section introduces the following numbering schemes:

- [“Compacting or rolling reuse of addresses” on page 59](#)
- [“Pairing addresses” on page 60](#)
- [“Filling the device number ranges” on page 62.](#)

### ***Compacting or rolling reuse of addresses***

You can use SS0 and SS1 to have PAV base and aliases in different subchannel sets, but with the same or correlated device numbers. For example, you can use two aliases for one base device, for example, to ensure that an alias device with a number of 1080 or greater can only be correlated with a base device with a number of 1080 or greater.

This section presents three examples with different ratios between base and alias devices. For example, a ratio of 1:2 means that two alias devices are related to one base device.

Example with ratio 1:2

Control unit	Devices / SSID	Device addresses / UAs
1000	64 3390Bs in SS0	1000-103F / 00 - 3F
1000	128 3390As in SS1	1000-107F / 40 - BF
1080	64 3390Bs in SS0	1080-10BF / 00 - 3F
1080	128 3390As in SS1	1080-10FF / 40 - BF
1100	64 3390Bs in SS0	1100-113F / 00 - 3F
1100	128 3390As in SS1	1100-117F / 40 - BF

With this approach and the 1:2 ratio, you have a range of 64 unit addresses from C0 - FF on each control unit and you have gaps in the device numbering in SS0 between 1040 and 107F, 10C0 and 10FF, and so on. You use the complete capacity of SS1 for defining alias devices, which results in 256 x 64 available UAs spread over 256 control units and also results in the same amount of available device numbers in SS0, which you can use for non-PAV devices or non-DASD devices.

As an alternative, you can use the complete unit address range on a control unit, if you select a ratio of 1:1 or 1:3. The 1:1 ratio would yield a direct correspondence between base and alias device numbers with the unit addresses of the bases in the first half of the range (00-7F) and the unit addresses of the aliases in the second half (80-FF).

Example with ratio 1:1

Control unit	Devices / SSID	Device addresses / UAs
1000	128 3390Bs in SS0	1000-107F / 00 - 7F
1000	128 3390As in SS1	1000-107F / 80 - FF
1080	128 3390Bs in SS0	1080-10FF / 00 - 7F
1080	128 3390As in SS1	1080-10FF / 80 - FF
1100	128 3390Bs in SS0	1100-117F / 00 - 7F
1100	128 3390As in SS1	1100-117F / 80 - FF

Example with ratio 1:3

Control unit	Devices / SSID	Device addresses / UAs
1000	64 3390Bs in SS0	1000-103F / 00 - 3F
1000	192 3390As in SS1	1000-10BF / 40 - FF
1040	64 3390Bs in SS0	1040-107F / 00 - 3F
1040	192 3390As in SS1	10C0-117F / 40 - FF
1080	64 3390Bs in SS0	1080-10BF / 00 - 3F
1080	192 3390As in SS1	1180-113F / 40 - FF

With this approach and the 1:1 ratio, you achieve a complete and consecutive use of the available device number ranges in SS0 and SS1. With the 1:3 ratio, exploitation of device numbers is consecutive, too, in both subchannel sets, but when SS0 is one-third full, SS1 is already used.

## Pairing addresses

In this section, we examine the method of pairing addresses, with consideration for different ratios between base and alias devices.

The first half of a control unit's range of unit addresses (128 devices) is allocated to the initial base range. In contrast to the method described in [“Compacting or rolling reuse of addresses” on page 59](#), we then reuse the second half of this device range for the next consecutive assignment of devices within SS1, thus creating a different correspondence between bases and aliases. This method works only when no more than 128 alias devices are defined for a range of base devices. Here, devices are aligned to unit addresses.

Example 1 with ratio 1:1

Range	Control unit	Device addresses / UAs (128 base devices in SS0)	Device addresses / UAs (128 alias devices in SS1)
8000-80FF	8000	8000-807F / 00-7F	8080-80FF / 80-FF
8000-80FF	8080	8080-80FF / 00-7F	8000-807F / 80-FF
8100-81FF	8100	8100-817F / 00-7F	8180-81FF / 80-FF
8100-81FF	8180	8180-81FF / 00-7F	8100-817F / 80-FF

It is now possible to have the following correspondence between base and alias devices, for example, on control units 8000 and 8080:

CU 8000:  
base devices (SS0) 8000-807F are related to alias devices (SS1) 8080-80FF  
and vice versa on CU 8080:  
base devices (SS0) 8080-80FF are related to alias devices (SS1) 8000-807F

As in “Compacting or rolling reuse of addresses” on page 59, with this approach and the 1:1 ratio, you achieve a complete and consecutive use of the available device number ranges in SS0 and SS1.

Example 2 with ratio 1:2

Range	Control unit	Device addresses / UAs (64 base devices in SS0)	Device addresses / UAs (128 alias devices in SS1)
8000-80FF	8000	8000-803F / 00-3F	8080-80FF / 80-FF
8000-80FF	8080	8080-80BF / 00-3F	8000-807F / 80-FF
8100-81FF	8100	8100-813F / 00-3F	8180-81FF / 80-FF
8100-81FF	8180	8180-81BF / 00-3F	8100-817F / 80-FF

Achieved consecutive device numbering with this approach (ratio 1:2):

SS0: -----	SS1: -----
8000-803F ... 8080-80BF 8100-813F ... 8180-81BF	8000-81FF

Let's now look at an example with ratio 1:4. Here, we see that we still achieve full ranges for the alias devices in SS1, however, the gaps in SS0 for the base devices are increasing, compared to ratio 1:2.

**Note:** A ratio of 1:3 (32 bases/96 aliases) also yields gaps in SS1 (in addition to the gaps in SS0).

Example 3 with ratio 1:4

Range	Control unit	Device addresses / UAs (32 base devices in SS0)	Device addresses / UAs (128 alias devices in SS1)
8000-80FF	8000	8000-801F / 00-1F	8080-80FF / 80-FF
8000-80FF	8080	8080-809F / 00-1F	8000-807F / 80-FF
8100-81FF	8100	8100-811F / 00-1F	8180-81FF / 80-FF
8100-81FF	8180	8180-819F / 00-1F	8100-817F / 80-FF

Achieved consecutive device numbering with this approach (ratio 1:4):

SS0:	SS1:
-----	-----
8000-801F ... 8080-809F	8000-81FF
8100-811F ... 8180-819F	

### Filling the device number ranges

This approach preserves the ranges in SS0 and aligns devices to unit addresses. It is driven by the desired base to alias ratio that was calculated in advance (potentially through the PAV analysis tool).

Basic principles used here are:

1. Establish base to alias ratio first. Align to boundaries of 16 devices.
2. Stick to this alignment for all device ranges.
3. All ranges are filled with 256 devices (00-FF).
4. Use up all device ranges.
5. Define alias devices to SS1.
6. Reuse device numbers used in SS1 as base device numbers in SS0.
7. Reuse device numbers allocated in SS0 in SS1.

### Example: 192 bases, 64 aliases (ratio 3:1)

- 256 available ranges exist for each of 256 devices ( $256 \times 256 = 65536$  or FFFF(hex) devices).
- 64 alias devices in SS1 free  $256 \times 64 = 16384$  devices in SS0.
- $16384 / 192 = 85$  additional ranges for defining base devices in SS0.

Using this example, you can create a worksheet to determine the available ranges.

Table 5. Worksheet showing available ranges					
Range	Control unit	192 base devices used in SS0	Free range for 64 base devices in SS0	64 alias devices used in SS1	Free range for 192 alias devices in SS1
1000-10FF	1000	1000-10BF (UA 00-BF)	10C0-10FF	10C0-10FF (UA C0-FF)	1000-10BF
1100-11FF	1100	1100-11BF	11C0-11FF	11C0-11FF	1100-11BF
1200-12FF	1200	1200-12BF	12C0-12FF	12C0-12FF	1200-12BF

Table 5 on page 62 shows the available device numbers in SS0. Remember, there is no correspondence between the device number and the unit address. Thus, in a single new control unit, you can define the spare device numbers accordingly:

### Example: new CNTLUNIT 2000

#### Available device numbers in SS0:

64 devices: 10C0-10FF (UA 00-3F)  
 64 devices: 11C0-11FF (UA 40-7F)  
 64 devices: 12C0-12FF (UA 80-BF)

====> a total of 192 free devices numbers, however discontinuous

#### Available device numbers in SS1:



64 devices to be defined on CNTLUNIT 2000: 1000-103F (UA C0-FF)

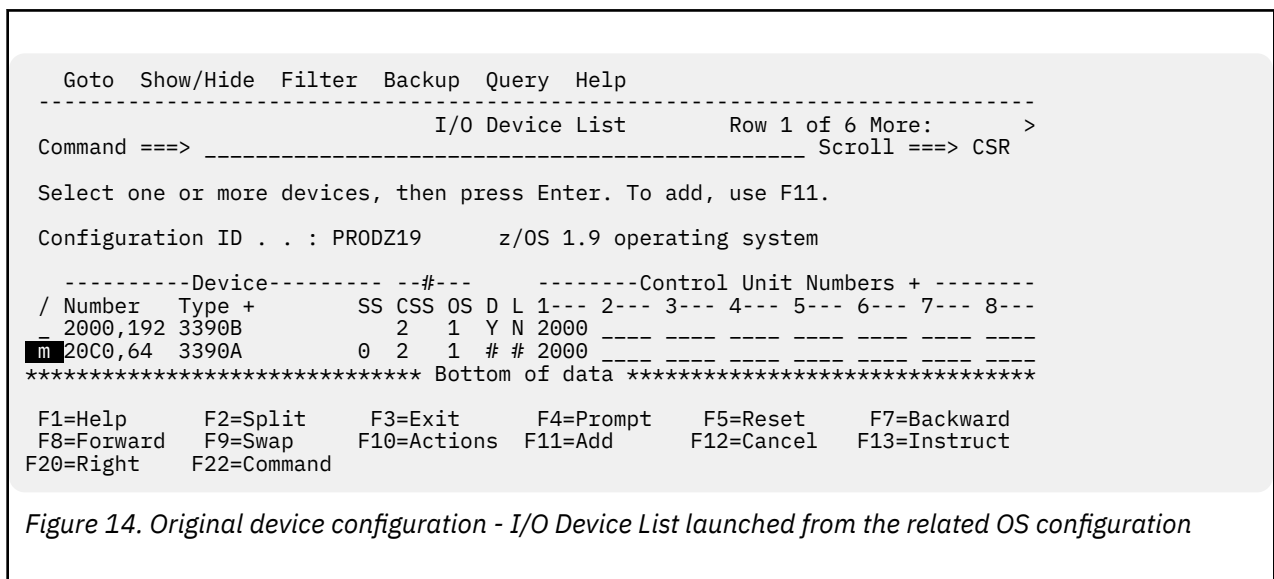
This action creates a range of  $4 * 64 = 256$  unused device numbers, distributed over subchannel sets SS0 and SS1 as shown in the worksheet. A further  $192-64=128$  device numbers are available in SS1 to be defined on a different control unit.

## Using HCD to move alias devices into a different subchannel set and closing the gaps in the device number range

This section uses the approach described in “Filling the device number ranges” on page 62. Ideally, the end result is a relationship between device numbers of base and aliases in the subchannel sets, and the freed device numbers in subchannel set 0 can be reused without disturbing existing numbering schemes.

Assume that you have the following configuration, in which all devices defined to subchannel set 0 are related to all channel subsystems of a processor:

- 192 base devices 2000 to 20BF of type 3390B are connected to control unit 2000 (type 2107), with unit addresses 00 through BF.
- 64 alias devices 20C0 to 20FF of type 3390A are connected to the same CU 2000, having the unit addresses C0 through FF.



Using the configuration shown in Figure 14 on page 63, suppose that you want to move the 64 3390A alias devices from subchannel set 0 to subchannel set 1 to gain space for defining new devices. Also, because you have used the numbering scheme in “Filling the device number ranges” on page 62, you have gaps of device numbers in SS0, which you want to fill by redefining the device numbers for the 3390B devices.

You cannot directly change device numbers in the HCD dialog without deleting and recreating the devices. To avoid an awkward and error-prone process, perform the following steps:

1. Create a work IODF from the production IODF to be changed.
2. Navigate to the required 3390A device group on the **I/O Device List** (see Figure 14 on page 63). You can use a filter for all alias devices of type 3390A. Then use action **Subchannel Set ID group change** from the context menu (or action code **m**).

HCD displays panel **Specify Subchannel Set ID** as shown in Figure 15 on page 64 . Set the Subchannel Set ID to **1**.



6. Using the current work IODF, select HCD dialog option 2.10 (**Activate or process configuration data** ---> **Build I/O configuration statements**) to write the following:
- A processor configuration deck for every processor having CU 2000 and the devices 20C0 - 20FF attached that you want to rename (specify **1** as the configuration type as shown in [Figure 18 on page 65](#)).
  - An OS configuration deck for every operating system with these devices attached (specify **2** as the configuration type).

7. Edit every processor configuration deck created in Step [“6.a” on page 65](#) and do the following:
- Replace device numbers of alias and base devices in the appropriate IODEVICE statements:

- b. For more complex scenarios, you might want to replace CU numbers in the appropriate CNTLUNIT and IODEVICE statements. Alternatively, you can change CU numbers before Step “6” on page 65 using the **Change Control Unit Definition** dialog.

8. Edit every OS configuration deck created in Step [“6.b” on page 65](#) and do the following:
  - a. Replace device addresses of alias and base devices in the appropriate IODEVICE statements. The changes are similar to the changes in Step [“7.a” on page 65](#).
  - b. If required, replace the CU numbers of alias and base devices in the appropriate IODEVICE statements (see also Step [“7.b” on page 65](#) for an alternative)
  - c. If required, replace device addresses of base devices in the appropriate EDT statements.
9. In the work IODF, delete all of the base/alias devices in the device number range to be moved.
10. If required, delete all of the CUs in the CU number range to be moved from the work IODF.

11. Use HCD dialog option 5.1 (**Migrate configuration data ---> Migrate IOCP/OS data**) to do the following:
  - a. Migrate the updated processor configuration decks into the work IODF (Migrate option = Incremental (2))
  - b. Migrate the updated OS configuration decks into the work IODF (Migrate option = Incremental (2)).

```

Migrate IOCP / MVSCP / HCPRIO Data

Specify or revise the following values.

Processor ID . . . . . PROCS1      +   CSS ID . . . . . _   +
OS configuration ID . . . . . PRODZ19  +

Combined IOCP/MVSCP input data set . 'DOCU.PROCS1.DECK'
IOCP only input data set . . . . . -----
MVSCP only or HCPRIO input data set -----
Associated with processor ----- +
partition ----- +
Processing mode . . . . . 2      1. Validate
                                   2. Save

Migrate options . . . . . 2      1. Complete
                                   2. Incremental
                                   3. PCHIDs

MACLIB used . . . . . 'SYS1.MACLIB'
Volume serial number . . . . . ----- + (if not cataloged)

F1=Help      F2=Split      F3=Exit      F4=Prompt      F9=Swap      F12=Cancel
  
```

*Figure 19. Migrate IOCP / MVSCP / HCPRIO Data*

12. Review the new I/O Device List to verify the results. In the I/O device list started from the related OS configuration (Figure 20 on page 66), note that the 3390A devices are defined to subchannel set 1. The previously occupied device number range 2000 - 20FF is now available for use on a new control unit.

```

Goto Show/Hide Filter Backup Query Help
-----
I/O Device List          Row 1 of 4 More:  >
Command ==> ----- Scroll ==> CSR

Select one or more devices, then press Enter. To add, use F11.

Configuration ID . . : PRODZ19      z/OS  operating system

-----Device----- --#--- -----Control Unit Numbers + -----
/ Number  Type +      SS CSS OS D L 1--- 2--- 3--- 4--- 5--- 6--- 7--- 8---
- 1000,64 3390A      1  2  1  #  # 2000 -----
- 10C0,64 3390B      2  1  -  - 2000 -----
- 11C0,64 3390B      2  1  -  - 2000 -----
- 12C0,64 3390B      2  1  -  - 2000 -----
***** Bottom of data *****

F1=Help      F2=Split      F3=Exit      F4=Prompt      F5=Reset      F7=Backward
F8=Forward    F9=Swap      F10=Actions F11=Add       F12=Cancel    F13=Instruct
F20=Right    F22=Command
  
```

*Figure 20. New I/O Device List after migration*

---

## Chapter 3. Specifying an I/O configuration at IPL

You must specify your I/O configuration definition at IPL: During initial install, upgrade, and recovery.

### Defining your initial I/O configuration

---

You define your initial I/O configuration in the following situations:

- You could be installing z/OS for the first time. In which case, you would have a bootstrap z/OS system with a basic IODF and a large range of disk, tape, and 3270-X devices, a SYSDA esoteric, etc.. This would require an initial "bootstrap" POR and IPL.
- You could be using IODFs for the first time and want to use dynamic configuration capability. In this case, you could run HCD and create the IODF. Do a POR to get the active hardware token into the HSA. See [“Ensuring that the software and hardware definitions match” on page 5](#) for information about configuration tokens.

Each time you install a new processor that does not have an IOCDS yet, you can use HCD to write the IOCDS to the remote processor. Alternatively, if your new processor is not yet in your processor LAN or you don't have remote access to it for any other reason, you can use HCD to build an IOCP input data set. Then you can transfer this data set to the support element of the remote processor and run the IOCP stand alone program that is installed in your processor.

Take the following general actions to define your configuration at IPL:

1. Create I/O software configuration plan.

See [Chapter 2, “Planning your I/O configuration definition,” on page 11](#).

2. Install your I/O devices.

See device guides for information about devices.

3. Install z/OS, which includes HCD.

See *z/OS Program Directory* and *z/OS HCD User's Guide*.

4. Install software support for IBM equipment.

The UIM points to other device support information provided with the product. See program directories for IBM products such as DFSMS or Virtual Telecommunications Access Method (VTAM®).

5. Provide and/or install software support for devices not supported by z/OS.

See *z/OS MVS Device Validation Support*.

6. Determine whether to authorize access to making dynamic configuration changes. The security administrator can use RACF to authorize operators and HCD users to activate dynamic changes. Before anyone can use either the ACTIVATE command or the HCD Activate New Configuration panel, the security administrator must give that user UPDATE authority to the MVS.ACTIVATE resource in the OPERCMDS class. (See *z/OS MVS Planning: Operations*.)

7. To handle data sets that are cataloged with an esoteric name, do one of the following:

- Specify a token for the esoterics. Allocation uses the esoteric token to find the appropriate esoteric for a data set that has been cataloged using esoterics. You no longer have to keep the esoterics in the same sequence and can delete and add esoterics without having problems accessing data sets that are cataloged using esoterics.
- Recatalog the data sets with a generic device type name (for example, 3380) before using HCD to migrate IOCP/MVSCP data.

8. Invoke HCD.

You start HCD like any other ISPF application in your TSO/E system. The default TSO/E CLIST that is supplied with HCD is CBDCHCD (which invokes CBDCHCD1) in library SYS1.SCBDCLST.

See *z/OS HCD User's Guide* for more information, including which functions are available as batch utilities and thus do not require ISPF.

9. Use HCD to define your configuration:

- a. Create a work IODF by either migrating MVSCP/IOCP decks with the HCD panels or migration batch facility or updating an existing IODF.

**Note:** If you are not using dynamic capability, sometimes you can anticipate I/O configuration changes. For example, you might know that a control unit and associated DASDs will be installed but are not installed when z/OS is IPLed. Two possible methods of adding the control unit and the DASD are:

- Define the control unit and DASD to both the hardware and the software before devices are installed. This strategy saves a POR and IPL when the physical control unit and DASD are installed. However, the inactive UCBs waste storage until devices are installed.
- Define the control unit and DASD only to the hardware before devices are installed. During POR, hardware definitions of the devices are built. When the control unit and DASD are installed, create the software definition, then IPL z/OS with the new software definition to make the devices available. This strategy saves a POR.

- b. Create a production IODF from the work IODF.

See *z/OS HCD User's Guide* for information about creating IODFs.

You do not need to pre-allocate an IODF; you allocate it through HCD, and it resides on the volume you specify through HCD.

You specify an EDT identifier and create an EDT as part of defining your configuration in HCD. You also specify an operating system configuration identifier.

10. Create the LOADxx member in which you specify an IODF statement to identify the I/O configuration definition for IPL.

An IODF statement contains the name of the production IODF and identifier of the EDT and operating system configuration that is used to IPL the system. The IODF identified becomes the active IODF for the system.

The Load Parameter Definition field (eight characters) in the Load Image Profile on the Hardware Management Console (HMC), managing z processors tells which LOADxx member to use.

See [“IODF processing at IPL” on page 70](#) for more information.

11. Specify the configuration to the hardware.

Use HCD to run IOCP to create I/O configuration data sets (IOCDs). To create IOCDs, you can also use IOCP directly without using HCD, but then dynamic capability will not be available, if IOCP statements are not generated by HCD. See *IOCP User's Guide*.

12. To enable dynamic I/O configuration changes, you must indicate that you want to allow dynamic modifications. You specify this information in the Activation Reset profiles.

The amount of storage allocated for your configuration in HSA depends on:

- The configuration definition (the number of devices, control units, and channel paths defined in the IOCDs) used for the POR
- The processor model and microcode level

There is an HSA option on the DISPLAY IOS,CONFIG command that displays the amount of HSA remaining for dynamic changes. For a description, see *z/OS MVS System Commands*.

13. Do a POR to initialize the channel subsystem/HSA from an IOCDs created by HCD.

When you go to make changes to your configuration, processor tokens in the current IODF and HSA must match in order to make hardware changes. To get the matching token in the HSA, you have to perform a POR with an IOCDs created by HCD. The IOCDs must contain a hardware configuration definition included with the current IODF.

14. When specifying system parameters for IPL, use the SQA parameter in the IEASYSxx member of SYS1.PARMLIB to define estimated additional storage for UCBs that will be added by future dynamic changes. System parameters can be specified either in the IEASYSxx member of SYS1.PARMLIB or as operator responses to IPL messages.

At IPL, the system determines from the current I/O configuration how much SQA and ESQA to use to represent the UCBs for the I/O configuration being IPLed. This amount of SQA and ESQA storage is added to the INITSQA value if it is specified in the LOADxx member and then increased by the amount that you request on the SQA parameter in the IEASYSxx member of SYS1.PARMLIB. (See *z/OS MVS Initialization and Tuning Reference*.)

You must ensure that there is also enough system queue area (SQA) storage for any devices that are to be dynamically added to a configuration.

When you dynamically add UCBs, the system obtains storage for these new UCBs from the SQA/ESQA and high common storage allotments. The amount of storage allocated depends on the type of device that the UCB represents and whether the LOCANY parameter is coded YES or NO.

Table 6. SQA/ESQA storage allocated for new UCBs

LOCANY parameter	Device Type	SQA storage allocated	ESQA storage allocated	High common storage allocated
No	DASD - 3380B, 3380A, 3390B, 3390A, 3390D, 3390S	168 bytes (x'A8')	48 bytes (x'30')	208 bytes (x'D0')
No	DASD - 3380, 3390, FBA	152 bytes (x'98')	48 bytes (x'30')	208 bytes (x'D0')
No	Tape	288 bytes (x'120')	48 bytes (x'30')	208 bytes (x'D0')
No	Other	152 bytes (x'98')	48 bytes (x'30')	208 bytes (x'D0')
Yes	DASD - 3380B, 3380A, 3390B, 3390A, 3390D, 3390S	0	216 bytes (x'D8')	208 bytes (x'D0')
Yes	DASD - 3380, 3390, FBA	0	200 bytes (x'C8')	208 bytes (x'D0')
Yes	Tape	0	336 bytes (x'150')	208 bytes (x'D0')
Yes	Other	0	200 bytes (x'C8')	208 bytes (x'D0')

Also, for a short period of time, the system performs additional processing to prepare the UCBs for use. This processing time varies greatly depending on the type of changes (adds, deletes, and modifications), the number of actual changes in a single activate, the number of processors available to an image to process these changes, as well as the image LPAR weight. If you are running in an SQA/ESQA constrained environment, activates are not recommended.

**Note:** If your installation needs to dynamically change between different configurations, in which few or none of the devices are the same, your installation must ensure there is enough SQA for the largest configuration and for the next largest configuration to be used. z/OS needs enough storage for all the UCBs in the current configuration and all the new and changed UCBs in the replacement configuration. If there is a problem during activation of the replacement configuration, z/OS needs this storage to recover and reestablish the UCBs that existed before the attempt to change the configuration.

15. Initialize z/OS with the production IODF and select the appropriate LOADxx member for the configuration. See [“IODF processing at IPL” on page 70](#) for more information.

# IODF processing at IPL

When you perform an IPL, the production IODF that defines the configuration to the system is selected and used. This IODF is selected from any number of other IODFs. You identify the IODF by the IODF statement in the LOADxx member of SYSn.IPLPARM or SYS1.PARMLIB PDS.

To identify the IODF selected at IPL, do the following:

1. Identify the IODF volume. An IODF volume is the direct access storage device (DASD) on which you place your IODFs. You identify the IODF volume on the LOAD parameter field (eight characters) in the Load Image Profile on the Hardware Management Console (HMC). See the processor documentation for more information. The IODF volume must be in the same subchannel set as the IPL device.

On the LOAD parameter, you specify the device number of the IODF volume and the identifier for the LOADxx member. If you do not specify an IODF volume on the LOAD parameter, the system searches the sysres volume. If you do not specify a LOADxx member on the LOAD parameter, the system uses LOAD00.

The SYSn.IPLPARM or SYS1.PARMLIB PDS contains the LOADxx member. See [“Search order for the LOADxx member and IODF” on page 71](#) for a description of the order in which the PDSs are searched.

2. In the LOADxx member, include an IODF statement that identifies the production IODF for IPL. For details about LOADxx, see *z/OS MVS Initialization and Tuning Reference*.

[Figure 21 on page 70](#) shows how the IODF is identified for IPL.

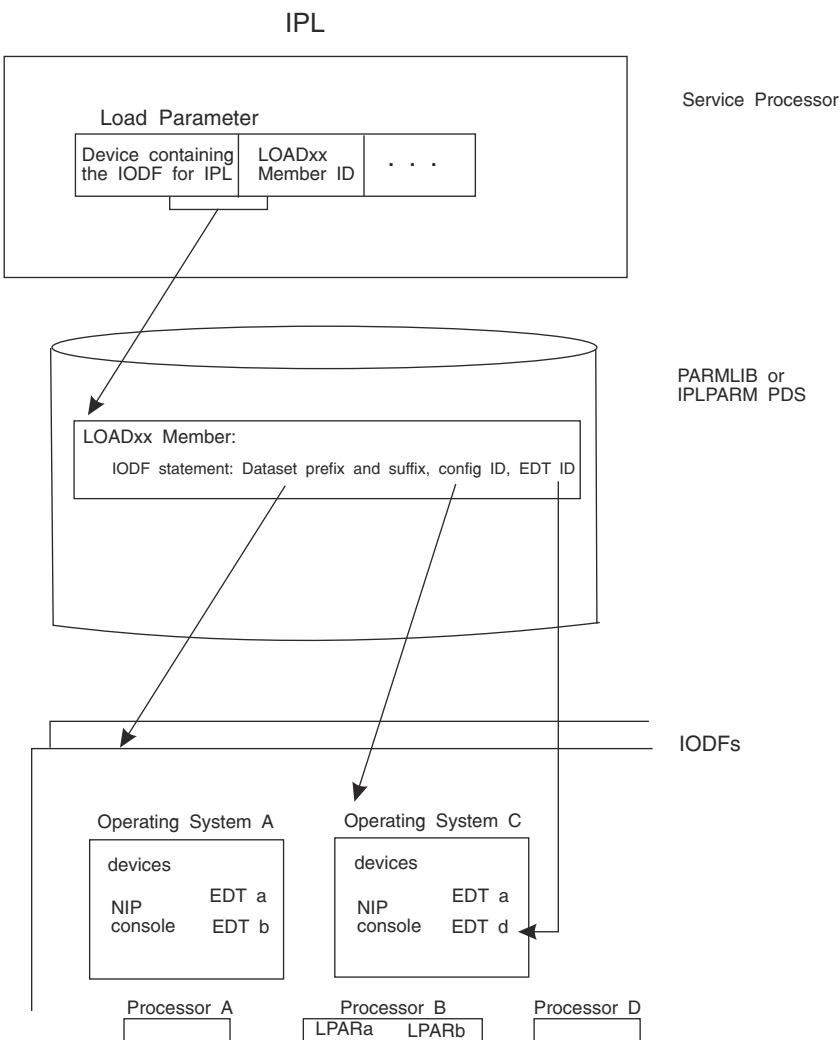


Figure 21. Specifying IODF at IPL



**Note:** Figure 21 on page 70 does not show a Subchannel set indicator located on the IODF statement and is used to tell the IPLing system which subchannel set should be checked for the IODF volume. See the description of the Subchannel set indicator in *z/OS MVS Initialization and Tuning Reference*.

You can have multiple operating system and processor configurations in one IODF. The configurations can share common device definitions. In the IODF shown in the example, the configurations for operating system A and operating system C share EDT a.

## IODF statement in the LOADxx member

A production IODF name has the following syntax:

```
(IODF-prefix).IODF(IODF-suffix)
```

An example of a production IODF name is SYS2.IODF01.

You can specify the IODF prefix and suffix in the LOADxx statement to identify the production IODF at IPL. The IODF statement in the LOADxx member can contain the following information:

- IODF suffix

The IODF suffix is the two digit hexadecimal number that is part of the IODF name. For example, 01 is the IODF suffix for IODF01.

- IODF prefix

The IODF prefix is an 8-byte high-level qualifier of the IODF data set name. For example, IBMCONF is the IODF prefix for the IODF data set IBMCONF.IODF01.

- Operating system (OS) configuration identifier

The 8-byte operating system configuration identifier is part of the configuration definition in the IODF; it identifies the operating system configuration.

- Eligible device table (EDT) identifier

The EDT identifier is the two character value that identifies the EDT for use with the configuration defined by the IODF. If you do not specify an EDT identifier, it defaults to 00.

- LOAD option

The LOAD option is a field where you indicate if the system will load device support code for every UIM, whether a device of that type is installed or not. If you leave the field blank or specify Y, the system loads all the device support modules for the devices in the IODF and all device types that support dynamic configuration for which you have UIMs installed. This option enables you to add device types dynamically that were not in the IODF at IPL. When you specify any other character, the system loads only the modules required for the devices defined in your current IODF.

- Subchannel set (SCHSET) indicator

Indicates the subchannel set IOS uses for normal base devices that have a special secondary device with the same address. The indicator provides direction when an IPL is required so that z/OS can bring the correct device(s) online when HyperSwap occurs. When the secondary device becomes the device in use, the active subchannel set for a special pair of devices will become the subchannel set to which the secondary device is attached. On systems where the special secondary device is connected and the value is not specified or the value is not valid (for example: not a 0, 1, 2, or \*), the system will prompt the operator with message IEA111D to determine which subchannel set should be used.

Specifying an asterisk '\*' will allow z/OS to inherit the active subchannel set from the IPL devices (for zEnterprise® 196 (z196) or later processors).

## Search order for the LOADxx member and IODF

During IPL, the system uses the LOADxx member that it finds first when searching in the following order:

1. The system first searches the IODF volume for a SYSn.IPLPARM PDS where **n** is 0 through 9.
2. If it does not find SYSn.IPLPARM, it searches the IODF volume for a SYS1.PARMLIB PDS.

3. If it does not find SYS1.PARMLIB on the IODF volume, it searches for SYS1.PARMLIB on the sysres volume.

**Note:** Because the system data sets are searched in ordered sequence, use SYS0.IPLPARM for best IPL performance.

Specifying the IODF on the sysres volume is not recommended for the following reasons:

- It is difficult to replicate the sysres volume if it contains an IODF because an IODF is a VSAM data set.
- When you share the sysres volume across multiple systems, I/O contention occurs when the systems are IPLed. Having the IODF on the sysres volume adds to the contention.

The LOADxx member may reside on either the IODF volume or the SYSRES volume.

If z/OS finds SYSn.IPLPARM or SYS1.PARMLIB, but it doesn't contain the LOADxx member in the LOAD parameter, z/OS enters a wait state.

### ***Specifying the IODF high-level qualifier***

If LOADxx is in SYS1.PARMLIB, you must specify an IODF high-level qualifier in the IODF statement. If the LOADxx member is in SYSn.IPLPARM and the IODF statement does not contain a high-level qualifier, z/OS defaults to the high-level qualifier of the SYSn.IPLPARM PDS.

If you optionally specify equals (=====) as the IODF high-level qualifier in the IODF statement, z/OS attempts to use the high-level qualifier from the hardware configuration token in the HSA. If the token is not available, z/OS loads wait state X'0B1', with reason code X'00B'. If the high-level qualifier found in the hardware configuration token contains a blank in the first character, z/OS loads wait state X'0B1', with reason code X'009'.

### ***Specifying the IODF suffix***

You can optionally specify an IODF suffix and operating system configuration ID in the IODF statement in LOADxx, or you can let z/OS find the correct IODF automatically. This automatic search saves you from having to change the LOADxx member every time you switch IODFs. However you might have to rename the suffix of the IODF so that z/OS will find it first in its search sequence.

The IODF search options (++ , -- , == , \*\* , and bb(blank blank)) provide flexibility in IODF management. You can set up LOADxx so that you do not have to change it, following every dynamic configuration and IOCDS update, for use at the next IPL. Users, who want to maintain a back up IODF on a second volume in case of device failure, can use the flexible searching algorithm. This allows the backup IODF name to have the next larger or lower sequential number as a suffix.

Table 7 on page 73 describes the options you can use when identifying the IODF and operating system configuration ID for IPLing the system.

When you specify asterisks, pluses, minuses, or equals as the IODF suffix, z/OS uses the IODF name in the hardware configuration token in the HSA. If you override the descriptor fields (when building a production IODF using HCD panels) and specify an invalid IODF name, the IODF portion in the hardware token in the HSA is unusable. In this situation, z/OS searches for a valid production IODF as follows:

- For '\*\*' and '++', z/OS searches suffixes X'00' to X'FF' for a valid IODF
- For '--', z/OS searches suffixes X'FF' to X'00' for a valid IODF
- For '==', z/OS loads wait state X'0B1', with reason code X'00B'



**Attention:** If you are specifying asterisks, equals, pluses, or minuses for the IODF suffix in LOADxx, never change the default descriptor field values on the HCD panel when you create a production IODF because z/OS uses this information to find the current IODF. Also, make it a policy to always write a new IOCDS after a dynamic configuration change.

Table 7. Specifying an IODF for IPL		
What you can specify in the IODF statement	How z/OS finds the IODF at IPL	How to make sure z/OS finds a new IODF at IPL
Asterisks '***' for IODF suffix	z/OS uses the IODF that you were running with. If you are IPLing initially or z/OS cannot find a current IODF, z/OS will behave as if you left the IODF suffix blank.	When you activate a different IODF, you do not have to change LOADxx or rename IODF suffixes.
Pluses '++' for IODF suffix	<p>z/OS uses the IODF that you were running with. If you are IPLing initially or there is no current IODF, z/OS behaves as if you left the IODF suffix blank.</p> <p>If the current IODF is not available, z/OS searches for the next available IODF starting with the current IODF suffix number plus one and searches to X'FF'. If none is found, the search continues from X'00' up to the current IODF number.</p>	When you activate a different IODF, you do not have to change LOADxx or rename IODF suffixes.
Minuses '--' for IODF suffix	<p>z/OS uses the IODF that you were running with. If you are IPLing initially or there is no current IODF, z/OS behaves as if you left the IODF suffix blank.</p> <p>If the current IODF is not available, z/OS searches for the next available IODF starting with the current IODF suffix number minus one and searches to X'00'. If none is found, the search continues from X'FF' down to the current IODF number.</p>	When you activate a different IODF, you do not have to change LOADxx or rename IODF suffixes.
Equals '==' for IODF suffix	z/OS uses the IODF that you were running with. If you are IPLing initially or there is no current IODF, z/OS loads wait state X'0B1', with reason code X'00B'.	When you activate a different IODF, you do not have to change LOADxx or rename IODF suffixes.
Both operating system configuration ID and IODF suffix.	<p>z/OS uses the IODF with the specified suffix for the IPL. The IODF may contain multiple operating system configurations, z/OS uses the specified one for the IPL.</p> <p>If an IODF with the specified suffix does not exist or does not contain the specified operating system configuration ID, z/OS enters a wait state.</p>	<p>When you activate a different IODF or operating system configuration, you must:</p> <ul style="list-style-type: none"> <li>• Change the suffix and configuration ID in the LOADxx member</li> <li>• Name the new IODF with the specified suffix and the operating system configuration with the specified ID.</li> </ul>
Operating system configuration ID and no IODF suffix.	<p>z/OS searches the IODFs in numerically ascending order starting with IODF00 and continuing through IODFFF until z/OS finds an IODF that contains the specified operating system configuration ID.</p> <p>If an IODF with the specified operating system configuration does not exist, z/OS enters a wait state.</p>	You need to make sure that the IODF that you want z/OS to find is the first one in the sequence that has that operating system configuration ID. If you activate a different IODF, you might have to change IODF suffixes so that IODF is the first one found.

<i>Table 7. Specifying an IODF for IPL (continued)</i>		
<b>What you can specify in the IODF statement</b>	<b>How z/OS finds the IODF at IPL</b>	<b>How to make sure z/OS finds a new IODF at IPL</b>
An IODF suffix and no operating system configuration ID.	z/OS uses the IODF with the specified suffix as long as that IODF only contains a single OS configuration.  If that IODF contains more than one operating system configuration, z/OS enters a wait state.	When you activate a different IODF, you must do one of the following: <ul style="list-style-type: none"> <li>• Change the suffix in the LOADxx member</li> <li>• Name the new IODF with that suffix.</li> </ul>
Both the operating system configuration ID and IODF suffix are left blank.	z/OS uses the IODF that it finds by searching in numerically ascending order starting with IODF00 for the first IODF that contains a single operating system configuration ID.	If you activate a different IODF, you do not have to change the LOADxx member but you do have to make sure that the new IODF will be the first one that z/OS finds by renaming the IODFs.

**Note:** If you specify asterisks, pluses, minuses, or equals, for the IODF suffix, do not change the default values for the descriptor fields when you create a production IODF. z/OS uses the default information to find the IODF.

When z/OS finds the IODF, it checks whether the IODF contains a hardware I/O configuration definition that matches the representation used by the channel subsystem. Whether it matches determines the kind of configuration changes you can make. If it does match, you can change both hardware and software definitions. If it does not match, you can make only software configuration changes. To enable changes to the hardware configuration definition, you can make a software-only dynamic change that activates an IODF containing the correct hardware I/O configuration definition.

### ***Specifying an operating system configuration ID***

If you also specify an operating system configuration ID in the IODF statement, the IODF may contain multiple operating system configurations and z/OS uses the specified one. If you do not specify an operating system configuration, then the IODF should contain only one operating system configuration. If the IODF contains more than one operating system configuration, z/OS enters a wait state.

### ***Specifying the EDT identifier***

If you are letting z/OS find the correct IODF automatically and you do not specify an EDT identifier, z/OS uses '00' as the identifier. To ensure that an IODF with the identified EDT exists, you can either specify an EDT identifier and put that EDT in each IODF or put an EDT with a '00' identifier in each IODF.

## **Using your initial I/O configuration with special secondary (3390D) devices for reIPL**

If special secondary (3390D) devices are used in an alternate subchannel set, the operating system must determine whether the IPL has occurred after a HyperSwap® that might have switched devices from the PPRC primary devices to the PPRC secondary devices. If so, the IPL can still use the initial I/O configuration definition, but must initialize using the correct set of devices as primaries and secondaries.

In the LOADxx parmlib member, the SCHSET parameter allows you to specify which subchannel set should be used as the primary devices for the IPL. You may specify the subchannel set number to be used for the primary devices or you may specify an asterisk (\*). The asterisk (\*) denotes that the devices in the same subchannel set as the IPL volume should be brought online as the PPRC primary devices.

For information on specifying the SCHSET parameter of LOADxx, see *z/OS MVS Initialization and Tuning Reference*.

## Defining your I/O configuration for reIPL

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Defining a configuration for reIPL is an exception or recovery task. The only times you would not perform a dynamic change are:

- When you are installing a device that does not support dynamic capability
- When you are installing a new product and no device code for it is resident
- When you need to reIPL the system after a system outage

Take the following general actions to define your configuration at reIPL:

1. Reconsider the SQA parameter values in case it needs to be increased due to additional devices being added to the configuration.
2. Update or create the LOADxx member so the new production IODF will be selected at IPL. This step is optional if you let the system find it by not specifying the IODF suffix. If you specify '\*\*', '++', '--', or '==' for the IODF suffix, z/OS uses the IODF that was the last active IODF. If you use asterisks for the IODF suffix, make sure that you always write a new IOCDS after a dynamic change and that you never change the default values of the descriptor fields when you create a production IODF.



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## Chapter 4. Dynamically changing an I/O configuration

HCD allows you to change an I/O configuration dynamically, that is, without an IPL or POR. It assumes that your current hardware and software configurations match. If they don't match, first perform the steps described in [“Ensuring that the software and hardware definitions match”](#) on page 5.

You can change the I/O configuration dynamically either locally, locally with target server for hardware-only change, sysplex-wide, or HMC-wide. Each way has different requirements so plan your configuration change according to your chosen approach. For more information, see *z/OS HCD User's Guide*.

### Locally

You can dynamically change the configuration of the system in which HCD is running. This includes the software changes of that system and changes to the hardware definitions for all LPARs on the CPC containing the system. Activation of these changes is initiated by one of the following ways:

- Using the activate option from the HCD ISPF application.
- Using the MVS ACTIVATE command. For more information, see *z/OS MVS System Commands*.
- Using the HCD ACTIVATE command of the HCD batch utility.

When you locally change the I/O configuration dynamically, it is necessary to logon to each system on all CPCs where dynamic changes are necessary.

### Locally with a target server using “Hardware Changes Only”

Using an option in the HCD ISPF application, you can dynamically change the configuration from z/OS HCD to a server that is running as a standalone coupling facility (SACF) using the “Hardware Changes Only” option. Currently, HCD can **ONLY** be used to target a “Hardware Change Only” to a processor that is a SACF processor, which runs coupling facility control code.

### Sysplex-wide

Using an option in the HCD ISPF application, you can dynamically change the configuration of all systems that belong to the same sysplex as the local system. When invoking this option, you get a selection list and you can select the systems and CPCs on which you want to initiate the dynamic configuration change. This way, you limit the number of systems to which you need to log on. Nevertheless, you need to distribute the changes in an IODF to different sysplexes and non-z/OS systems if the changes involve more than one sysplex and the CPCs on which its systems are running.

### HMC-wide

Another option in the HCD ISPF application is to initiate the dynamic configuration changes from a central z/OS system. You use this system to perform the changes to the configuration. To dynamically activate the changes, the new configuration in the IODF is automatically distributed to remote sysplexes and non-z/OS systems and activated remotely. This can be done for all systems that run on a CPC that is connected to the same management network managed by the Hardware Management Console (HMC) as the local CPC. To allow for this configuration, you need to start a HCD dispatcher process that can be reached remotely using TCP/IP. Using this connection, also remote system commands can be issued, for example, to prepare for an activation or to activate the configured hardware after activation.

Before attempting to change an I/O configuration dynamically, ensure that your system has migrated to dynamic capability. Until your installation updates its affected application programs or installs updated products to support dynamic configuration, you should define any devices that support dynamic configuration as installation-static, so that the programs that do not support dynamic configuration can continue to use the devices.

For migration information, see [Appendix A, “Configuration and recovery scenarios,”](#) on page 115.

## Changing or upgrading your processor configuration

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When you need to change a support level of your processor or upgrade your processor to a new type, consider doing this in a working copy of the active production IODF, created by initiating the very first change in the production IODF.

Changes to a processor configuration in HCD requires a special information table, known as a Processor Information Table (PIT). It contains a set of constants that describe each particular processor type and helps HCD to validate a processor definition. A PIT for a new processor type or for an additional support level of the existing processor type is provided by IBM in a corresponding PTF or in the base of z/OS when a new processor type or a new support level for the existing processor type is made available for installation.

HCD reads all available PITs when you start an HCD dialog; you can choose Option 7. Query the supported hardware and installed UIMs and then select 1. List supported processors to display all processor types, supported in this particular dialog. Additional information on the processors may be displayed by horizontal scrolling; you can find an identification of a hardware support level in additional columns. If a line is preceded by a '#' sign, it is the indication that this line and the previous line belong together, because the information of a horizontally scrolled screen does not fit in one line. See Appendix F. Machine limits and rules in the *z Systems IOCP User's Guide* to help you to understand what is delivered by a PIT to HCD. When you need to change a processor support level or upgrade a processor, it is your responsibility to install maintenance that contains a corresponding PIT. If a PIT for a processor type is not installed, an attempt to enter a type-model for a new processor is diagnosed by message CBDA100I:

```
CBDA100I Unknown processor type-model proc_type/model specified
```

There is a distinction between changing a support level of an existing processor and upgrading an existing processor to a new type.

### Considerations when changing a support level of an existing processor

From the HCD perspective, each new support level of an existing processor type requires an additional PIT. You may see multiple lines for the same processor type-model on the Query Supported Processors screen if HCD finds multiple PITs for the same processor type-model. If a change of a support level is required for changing existing or/and adding new I/O features, you must initiate the Change Processor Definition dialog. Do not alter anything on the first screen unless there are fields that you would wish to update; after pressing the Enter key, HCD will display the Available Support Levels panel.

Here you can choose a target support level; only after the change you may be able to modify those components of the I/O configuration that depend on a specific support level.

From the hardware perspective, a change of a support level is always a concurrent operation, it does not require bringing a processor down. If changing a support level is the only modification in the processor configuration in the IODF in preparation for future modifications of channel paths, control units, etc., this processor configuration may be dynamically activated without varying/configuring offline any of channel paths and/or I/O devices. However, a change of a support level is always aimed to modify the active I/O configuration. When such modifications are introduced in the IODF, then, depending on each installation's environment or technical reasons, some changes of the active I/O configuration may require bringing operating systems down with or without bringing down the whole processor. Please refer to subsequent sections in this Chapter for more information regarding changing different parts of the I/O configuration.

**Note:** If a processor model in the definition of your processor needs to be changed but its type will remain the same, and there are no other planned changes in the I/O configuration, there is no immediate need to activate a new processor configuration, you may delay dynamic I/O configuration until changes in other parts of your I/O configuration are needed.



## Considerations when upgrading an existing processor to a new processor type

When you upgrade from an existing processor to a new processor type, you have to bring the current processor down. You have to plan this disruptive action to minimize the potential impact on the operating systems that are running on remaining processors.

As the HCD administrator you might have to consider the following steps as part of changing a processor configuration:

- Creating a new work IODF by initiating a change in your active production IODF. HCD will copy all processor and operating system configurations to a new work IODF and then make it available for further modification.
- Changing the processor ID if necessary.
- Changing the current type and model of the outgoing processor to the type and model of a new processor.
- If necessary, updating a processor serial number and description.
- If necessary, updating the network name and CPC name fields in the SNA address.
- Updating a local system (processor) name if you wish to make it different from the processor ID.
- Building an IOCDS with the I/O configuration for a new processor using the option "Write IOCDS in preparation of the upgrade".

IBM recommends that you do not include a new processor's type and/or model into a network name in the SNA address or into a local system name in the corresponding field. IBM recommends that you introduce naming conventions that may remain the same in definitions of a future processor configuration. The use of names, not dependent on a processor type-model, will help develop consistent operational instructions and make configurations of peer processors independent of names of currently installed processors. Use the CHPID Mapping Tool (CMT).

**Note:** Definitions of some interprocessor connection types include specifications of local system (processor) names of peer processors. One example may be an Infiniband-based CF connection; a definition of an Infiniband channel path must include a local system name of a processor on the other side of the CF connection. If system names in the definitions of Infiniband channel paths do not match local system names of peer processors, expect a CF connectivity problem (loss of a signal).

A mismatch could be a result of a mistake or a typo in the process of entering a local system name for a peer processor on one of the sides. You may fix an error/typo in the incorrect local system name dynamically, in nondisruptive mode. Initiate the processor configuration change dialog against the processor configuration you need to fix, follow the dialog of creating a new work IODF, change the value in the Local system name field, build a new production IODF, and activate in hardware and software mode as required.

## Actions to change your configuration dynamically

---

Defining a configuration dynamically involves the following tasks:

1. Verify that each I/O device that you plan to delete is not needed by any application or logical partition by varying the I/O device offline.
2. Check that the current software I/O configuration definition matches the hardware I/O configuration.

You can check that the definitions match by testing an activation of a hardware and software change, using a currently active production IODF. Use the `D IOS,CONFIG` system command to identify the IODF. When the activation specifies configurations that do not match, the test function displays an error message. For more information about testing an activation, see [“Testing dynamic activation” on page 112](#).

You can use HCD option 2 and option 5 (View active configuration) when on the View Active Configuration panel. Check YES in both fields under the Activation scope title.

3. Attempt to change the (current) active production IODF.

This action will cause HCD to create a new work IODF.

4. Change the work IODF to define the new I/O configuration.

Along with specifying other information about the configuration, you use HCD to define as DYNAMIC "Yes" each device that you want to be able to dynamically change. DYNAMIC "Yes" is not required to add a device dynamically but is required to change or delete it. For more information about defining devices dynamically, [“Making dynamic changes to I/O devices” on page 85](#).

5. Create a production IODF from the work IODF. A new production IODF should have a data set name this is different from a data set name of the active IODF. Do not overwrite a currently active IODF or you will lose the ability to make dynamic changes.

In order to be able to change dynamic I/O configuration dynamically, keep the high-level qualifier in the IODF data set name the same as the name of the current active IODF and do not override the IODF descriptor fields.

6. If desired, physically remove the devices that you are deleting.
7. Optionally, test the configuration before you actually activate it. For more information about testing an activation, see [“Testing dynamic activation” on page 112](#)
8. Activate the new IODF.

See [“Dynamically changing an I/O configuration in hardware” on page 81](#) for a description of activating changes in logical partitions. For a software and hardware dynamic activation, the software and hardware configurations must match. When they match, activation occurs. When they do not match, activation does not occur.

See [“Dynamically changing an I/O configuration in a sysplex” on page 84](#) for planning considerations before you dynamically activate configurations in a sysplex.

9. Update or create the LOADxx member so the new production IODF will be selected at IPL. This step is optional if you let the system find it by not specifying the IODF suffix. If you specify '\*\*\*', '++', '- ', or '==-' for the IODF suffix, z/OS uses the IODF that was the last active IODF. If you use asterisks, ensure that you always write a new IOCDs after a dynamic change and that you never change the default values of the descriptor fields when you create a production IODF. For more information, see [“IODF processing at IPL” on page 70](#).

10. If desired, install the new I/O components.
11. Use HCD to write a new IOCDs for the new default IOCDs at the next POR.
12. Optionally, use HCD to create a backup copy of the new production IODF in case you lose your DASD.
13. Update the standard configuration list (CONFIGxx) member in SYS1.PARMLIB to reflect the new configuration definition.

You can use the configuration defined in CONFIGxx to compare the differences between the current configuration and the standard configuration as defined in a CONFIGxx member. When the operator issues the DISPLAY command with the M=CONFIG(xx) option, the system displays any differences.

Enter the DISPLAY command (D M=CONFIG(xx)) to view any differences caused by the dynamic configuration change and update the CONFIGxx member to reflect the new definition. For descriptions of the statements and parameters of CONFIGxx, see *z/OS MVS Initialization and Tuning Reference*.

14. You can also use HCD to build the CONFIGxx member from a configuration in the IODF, and to process the DISPLAY M=CONFIG(xx) command. For more information, see *z/OS HCD User's Guide*.
15. Use HCD to create a stand-alone IOCP input statements on the USB Flash Memory Drive for recovery support.

A USB Flash Memory Drive can be used for recovery if you lose the disk holding the IOCDs in the processor controller. For a description of creating an IOCP input data set, see *z/OS HCD User's Guide*.

#### **Related information:**

- For more information for the type of I/O component you are defining, see [“Dynamically changing component definitions” on page 85](#).

- For the recovery steps to take if your system fails during a dynamic configuration change, see [“Recovery during dynamic configuration”](#) on page 113.

## Dynamically changing an I/O configuration in hardware

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With multiple logical partitions active in the same processor, any single logical partition can make dynamic configuration changes that affect the hardware configuration for all the other logical partitions. To eliminate unwanted disruption across logical partitions (to not delete hardware I/O components that are in use by another logical partition), you must follow these steps:

1. In all logical partitions **except one**, use HCD panels to make software-only changes, (see [“Making software-only dynamic changes”](#) on page 7). Think of the software only changes in these partitions as step 1. In the HCD panels, activate the “software definitions only and validate hardware changes” option.

You can use the ACTIVATE command with the SOFT option. See *z/OS MVS System Commands*. As you make the software-only changes to each logical partition, the system validates that the I/O components being deleted are not in use.

Software-only changes with validation of hardware changes is critical if hardware changes affect PCIe-based functions and existing coupling facility connections. In addition to software-only changes, hardware validation will help involve z/OS systems to prepare their logical partitions for accommodation of final hardware changes. It will make a new coupling facility available in a logical partition without changing any of the existing CF connections, while keeping it safe and not requiring a hardware validation. Skipping a validation of hardware changes during dynamic I/O configuration in software-only mode might lead to unpredictable results after completing software and hardware changes.

If you are certain that a dynamic configuration change will not affect a particular logical partition, you do not need to make software-only changes to that logical partition. However, if you decide to make software-only changes to that logical partition, use the correct IODF as described in [“Ensuring that you activate the correct IODF in step 1”](#) on page 81 in [“Dynamic I/O configuration considerations”](#) on page 81.

2. In the **remaining** one logical partition, use HCD panels to make both hardware and software changes, (see [“Making both hardware and software dynamic changes”](#) on page 8). Think of the hardware and software change in this remaining partition as step 2. In the HCD panels, activate “hardware and software definitions”. You can also use the ACTIVATE command and omit the SOFT option.

## Dynamic I/O configuration considerations

Consider the following when making dynamic I/O configuration changes:

### Ensuring that you activate the correct IODF in step 1

Make sure you activate the correct IODF in step 1. Especially if it involves dynamic changes to the coupling facility devices and control units. If you activate an incorrect IODF (or for other reasons such as an omitted dynamic software activate in the past your active IODF does not point to the active hardware) and the system displays message IOS500I or IOS1500I with a note indicating that the IODF does not contain a configuration definition that matches the current hardware definition, you must bring your system back in the situation that current hardware and software definitions match. For all partitions, where you already performed the software activate, this means that you need to do the reverse action by performing a software activate back to the IODF used for the last software and hardware change. Details are described in [“Ensuring that the software and hardware definitions match”](#) on page 5. Afterwards you can start the activation process again with the correct target IODF.

1. In the step 1 partition, activate the previous IODF to reset the configuration definition to its previous state.
2. In the step 1 partition, activate the correct IODF.
3. In the step 2 partition, perform the software and hardware change.

If the system does not display the note on the IOS500I or IOS1500I message, you can activate the correct IODF in the step 1 partition and perform the software and hardware change in the step 2 partition.

Be aware that the changes to the step 1 partitions brings these partitions temporarily out of sync with the hardware definition. This condition is resolved with the software and hardware change for the step 2 partition.

## Dynamic deletion of I/O hardware components

HCD does not allow you to delete I/O components from the system it is running in. To prevent you from inadvertently deleting I/O components that another logical partition is using, HCD only allows you to delete those I/O components when you explicitly allow that. Ensure that you make the software-only changes in the other logical partition with the hardware validation before deleting the I/O component.

There are different kinds of removals of I/O components. In the first case, the I/O component remains connected to the processor and only the access by a partition is removed. In the second case, the I/O component is disconnected from the processor. To allow the first case, specify Yes in the "Delete partition access to CHPIDs unconditionally (FORCE=CANDIDATE)" field on the Activate New Configuration panel. To allow the second case, specify Yes in the "Allow hardware deletes (FORCE, FORCE=DEVICE)" field on the Activate New Configuration panel.

You can also use the MVS ACTIVATE command to either dynamically test or activate a new I/O configuration definition. To delete components, use the FORCE=CANDIDATE, FORCE, or FORCE=DEVICE attribute on the ACTIVATE command. See *z/OS MVS System Commands*.

## Dynamic activation in a sysplex that includes a uniprocessor

If you use the ACTIVATE command in a sysplex that includes a uniprocessor, that system might encounter problems in maintaining XCF synchronization with the rest of the sysplex.

## Example of deleting an I/O device

For the sample processor running in LPAR mode shown in [Figure 22 on page 82](#), assume the following:

- You wish to delete device 000F.
- The current production IODF is SYS1.IODF14.

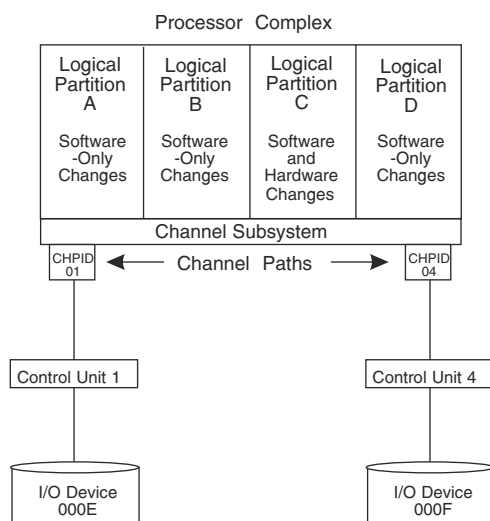


Figure 22. Sample processor configuration before deleting a device

In this example, you would make dynamic changes through the following steps:

1. Ensure that device 000F supports dynamic configuration.
2. Ensure that device 000F has been defined as dynamic.

3. Ensure that device 000F is varied offline in all partitions that have it in their I/O configuration.
4. Use HCD panels to create a new production IODF (SYS1.IODF15) that omits the device F definition. For more information, see *z/OS HCD User's Guide*.
5. Make software-only dynamic changes in logical partition A. (See [“Making software-only dynamic changes” on page 7.](#))
6. Make software-only dynamic changes in logical partition B.
7. Make software-only dynamic changes in logical partition D.
8. Make hardware and software dynamic changes in logical partition C. (See [“Making both hardware and software dynamic changes” on page 8.](#))
9. Physically remove device F.

## Dynamically changing logical partitions to the I/O configuration

On any IBM Z processor, you can pre-define one or more reserved logical partitions, which you can later add and remove from the I/O configuration dynamically.

- To add a logical partition dynamically to the I/O configuration, you first pre-define it, which reserves the space in the IOCDS and HSA. Then later, you can assign a name and resources to the logical partition using dynamic I/O.
- To delete a logical partition dynamically from the I/O configuration, you unassign the resources to it and then unassign the partition name. The partition will then revert back to the pool of reserved logical partitions - the space used by the partition is not returned to the available pool of storage.

Consider the following when dynamically adding and removing logical partitions to the I/O configuration:

- You cannot dynamically remove an active logical partition from the I/O configuration.
- After you assign a name to a partition, you can assign dedicated CHPIDs for that partition and add the partition to the candidate lists of any reconfigurable, non-managed shared, or spanned CHPIDs. Managed channels do not have to be added to the candidate list - they are in the candidate list, even unnamed ones, by default.
- When defining the partition, decide on whether the partition requires unique UID values for all PCIe functions assigned to it. For details on support and requirements, refer to the documentation of the operating system that you intend to run in the partition.
- Before deleting a logical partition from the I/O configuration by unassigning the partition name, you must unassign any dedicated CHPIDs defined for the partition. If there are any reconfigurable, non-managed shared, or spanned CHPIDs defined for the partition, you must remove the partition name from the candidate list for those CHPIDs.
- When you prepare to delete a logical partition dynamically, if Cryptographic coprocessors are configured to the logical partition you are trying to delete, these features must be deconfigured from the LPAR image using the zSeries Hardware Management Console or Support Element tasks. For more information about how to view or change your Cryptographic assignments, see the following documentation for your installed hardware:
  - *Support Element Operations Guide*
  - *Processor Resource/Systems Manager Planning Guide*
- When you delete a logical partition from the I/O configuration dynamically, you do not have to delete the partition from each device's candidate list, unless you used an explicit candidate list when you defined the device.
- You cannot rename a partition in one step. To achieve this, you need to perform two dynamic activations. The first activate that deletes the partition and the second activate that adds the partition with a new name.

Dynamically changing a partition definition may require that the partition is offline. For details, see [Table 8 on page 84](#).

Table 8. Dynamically changing a partition definition

Deactivate partitions before activating partitions that change these partition attributes	Before activating the new IODF, take the following actions
UID uniqueness	Shut down the operating system running in the partition and deactivate the partition.

You do not have to deactivate the partition before activating an IODF when you change any of the following characteristics:

- Partition usage
- description

## Dynamically changing an I/O configuration in a sysplex

You can use HCD as a single point of control to dynamically activate an I/O configuration on one or more systems configured in a sysplex. To determine the supported processors, run the HCD Supported Hardware Report. For information about running reports, see *z/OS HCD User's Guide*.

Using the "Activate configuration sysplex-wide" option on the HCD Activate and Process Configuration Data panel, you can make software-only changes as well as software and hardware changes to one or more systems from a system in your sysplex.

Consider the following requirements before you activate your sysplex-wide configuration changes:

- You can perform a sysplex-wide activation only on a system that is running and is configured in the sysplex couple data set. For more information about sysplex couple data sets, see *z/OS MVS Setting Up a Sysplex*.
- For a sysplex-wide activation to work on a system, the system must allow software configuration changes. To verify that a system allows software configuration changes, select the "Activate or process configuration data" option on the HCD Primary Task Selection panel and then the "View active configuration" option on the HCD Activate and Process Configuration Data panel on that system. HCD displays the currently active IODF, the HSA token, and information about limitations to the activation scope.

After you initiate a sysplex-wide activation, respond to any activation messages.

## Dynamically changing an I/O configuration in an HMC-attached processor control network

You can use HCD as a single point of control to dynamically activate an I/O configuration on one or more systems, active in logical partitions of processors, attached to a Hardware Management Console network (HMC-wide Activate). The option is available via the View all logical partitions (images) dialog - a part of an IBM Z Cluster management, invoked from the Activate or Process Configuration Data panel in HCD. Target systems do not have to be members of the same sysplex, they may be standalone systems or members of different sysplexes. As a prerequisite, the BCPII (Base Control Program internal interface) address space must be active on the system, used to manage HMC-wide Activate. Additionally, a special HCD dispatcher address space should be started on each system that you may be targeting for HMC-wide activate. The purpose of the HCD dispatcher is starting the HCD server, responsible for all further actions.

To determine processors that may be targeted by HMC-wide Activate, run the HCD CSS summary report and then choose processor IDs, defined with valid SNA addresses in the corresponding column in the Processor Summary Report section. Then open the Systems Management dialog on an HMC and access System details of each processor that has a matching Processor ID. From there, select the Network information tab and compare a shown SNA address with an SNA address of the same processor in the HCD report. Only processors with matching SNA addresses may be targeted by HMC-wide Activate.

HMC-wide Activate provides the following major actions:



- Activate "software configuration only" on the target system, using the IODF that is currently active on that system.
- Activate "software and hardware configuration" on the target system, using the IODF that is currently active on that system.
- Resume activation of target configuration if you would like to complete (force) the activation of the system despite a failure to activate the configuration in regular mode.
- Reset source configuration to the source IODF with the configuration that existed before the failure occurred.

You may submit commands for execution on the target systems, retrieve messages generated by the commands, and delete messages generated by the commands.

For more information about using the "View all logical partitions (images) dialog", see [Prerequisites for working with CPC images in z/OS HCD User's Guide](#).

## Dynamically changing component definitions

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You can dynamically add, modify, or delete components in the configuration. You can make software and hardware changes or software-only changes. In most cases, you will make simultaneous dynamic configuration changes to both hardware and software configuration definitions. The following sections describe how to dynamically change component definitions. For software-only changes, you do not have to perform all the steps. It is noted when the step is not required for a software-only change.

Any dynamic configuration addition, modification, or deletion requires the following two general steps:

- Describe the new I/O configuration definition in an I/O definition file (IODF) that you create through HCD. See *z/OS HCD User's Guide*.
- Activate the new IODF.

You can use either HCD panels or the ACTIVATE command to dynamically activate or test a new I/O configuration definition. Generally, system programmers use HCD and system operators use the ACTIVATE command. To use HCD panels, see *z/OS HCD User's Guide*. To use the ACTIVATE command, see *z/OS MVS System Commands*.

### Note:

1. For software/hardware changes, activate "hardware and software definitions". Also, write a new I/O configuration data set (IOCDS) for the new default IOCDS at the next POR.
2. For software-only changes, activate "software definitions only." You can also choose to "validate hardware changes," which validates that I/O components being deleted are not in use.

If changes involve PCIe-based resources and coupling facility connections, remember to do software only changes with hardware validation.

Additional steps related to specific I/O components are described in

- ["Making dynamic changes to I/O devices" on page 85](#)
- ["Making dynamic changes to channel paths" on page 90](#)
- ["Making dynamic changes to control units" on page 94](#)

For additional information, see ["Making dynamic changes to PCIe functions" on page 93](#).

Coupling facility device and control unit definitions in the IODF are created or deleted automatically when coupling facility channel paths are connected or disconnected. See ["Making changes to coupling facility devices and control units" on page 95](#).

## Making dynamic changes to I/O devices

You can dynamically add, modify, or delete device definitions. Remember that devices defined as installation-static can still be dynamically added.

## Dynamically adding I/O devices

To dynamically add an I/O device, use the following general steps:

1. For each device that you plan to add, ensure that its device support code was loaded at the last IPL.

There are two ways which device support code is loaded at IPL. The choice made at the last IPL can determine whether the device support code is loaded for the device that you want to add. Through the IODF statement in the LOADxx member of SYS1.PARMLIB, or SYSn.IPLPARM, for the last IPL, you might have chosen either of the following:

- To load, at IPL, all the dynamic device support code in SYS1.NUCLEUS.

This choice, which is the default, allows you to dynamically add any device that supports dynamic configuration.

- To load, at IPL, device support code for only those device types defined in the IODF. This choice allows you to dynamically add only those device types that were defined in the IODF.

If you add a new device and the device support code for that new device was not loaded at IPL, your system cannot use that device. Before your installation can use that device, you must re-IPL the system to load the device support code.

After a HyperSwap failover swap has occurred, ensure that if a Special Secondary (3390D) device is being added, a 3390B PPRC primary device with the same four-digit device number is also being added. If one device in a Special PPRC pair (3390B/3390D) is not being added when the other device in the pair is being added, the dynamic activate will fail.

In general, devices, including PPRC secondary (3390D) devices in an alternate subchannel set, can be dynamically added at any time. However, since 3390D devices are accessible through their corresponding partner devices in the primary subchannel set, adding such devices without their primary partners either already existing or being added at the same time will leave those 3390D devices inaccessible and, therefore, unusable.

After a HyperSwap failover swap has occurred, adding PPRC secondary (3390D) devices to the active subchannel set while their corresponding partners in the primary subchannel set already exist will not be allowed since the newly added devices, which may not contain the most up-to-date data, will replace their primary partner devices as the active devices.

For details about specifying your choice at IPL, see [“IODF processing at IPL” on page 70](#).

2. Describe the new I/O configuration definition in an I/O definition file (IODF) that you create through HCD. Including an I/O component in an IODF adds that I/O component's definition to the I/O configuration definition.
3. Activate the new IODF using the steps in [“Dynamically changing an I/O configuration in hardware” on page 81](#).
4. Install the new I/O devices that you have dynamically added through the new IODF. Vary the added devices online to eligible systems using the corresponding system commands. New and not yet formatted disk devices should be formatted in offline mode prior to varying them online.

Besides these general actions to add a device, other actions might be required to make certain devices usable. For example, adding a direct access storage device (DASD) to support a page data set requires the following actions:

1. For the DASD that you plan to add, ensure that device support code was loaded at the last IPL.
2. Create a new I/O definition file (IODF) that defines the DASD to both hardware and software.
3. Activate the new IODF.
4. Install the DASD.
5. Run the ICKDSF program to format a volume on the DASD.
6. Vary the DASD online to z/OS.
7. Run IDCAMS to define the page data set on the DASD.
8. Enter the PAGEADD command to add the page data set.



z/OS directs paging activity to the volume.

**Note:** You can add a new bank of DASD using the same procedure, but perform the steps for all the DASDs in the bank.

## Dynamically deleting I/O devices

To dynamically delete an I/O device, use the following general steps:

1. Ensure that each device you plan to delete is not needed by any application running in the processor. In a Processor Resource / System Management (PR/SM) environment, this includes applications running in any logical partition in your processor. See [“Dynamically changing an I/O configuration in hardware” on page 81](#).
2. Ensure that each device you plan to delete is offline and not in use. CTC and TP devices must also not be allocated. For JES3 FSA (Functional Subsystem Application) devices, HCD will allow the deletion as long as the device you are deleting is offline. However, JES3 requires that all FSA devices assigned to the FSS (Functional SubSystem) are inactive when performing a subsequent Hot Start with Refresh to inform JES3 that FSA devices have been deleted from the IODF configuration.

After a HyperSwap failover swap has occurred, ensure that if a Special Secondary (3390D) device is being deleted, a 3390B PPRC primary device with the same four-digit device number is also being deleted. If one device in a Special PPRC pair (3390B/3390D) is not being deleted when the other device in the pair is being deleted, the dynamic activate will fail.

In general, PPRC secondary (3390D) devices can be deleted with or without their corresponding primary partners also being deleted.

After a HyperSwap failover swap has occurred, deleting devices in the primary subchannel set while their PPRC secondary (3390D) devices exist in the active subchannel set is not allowed since the 3390D devices will be left inaccessible without their corresponding primary partners if and when the system is re-IPLed.

3. Describe the new I/O configuration definition in an I/O definition file (IODF) that you create through HCD. Omitting an I/O component from an IODF deletes that I/O component's definition from the I/O configuration definition.
4. Physically remove the I/O devices that you have dynamically deleted through the new IODF.

**Note:** This step is not required for a software-only change.

5. Activate the new IODF.

Besides these general actions to delete a device, other actions might be required for certain devices. For example, deleting a DASD that contains only one page data set requires the following actions:

1. Ensure that the DASD you plan to delete is not needed by any application.
2. Create a new IODF that **does not** define the DASD.
3. Enter the PAGEDEL command.

The system displays message IEE206I to indicate that the page delete request is accepted and in progress.

When the delete request completes, the system displays message IEE205I to indicate that the page data set is deleted.

4. Enter the DISPLAY UNITS command to determine whether the device that held the page data set is unallocated.
5. After the device is unallocated, vary it offline to z/OS.
6. Physically remove the DASD.
7. Activate the new IODF.

This procedure deletes the DASD definition from z/OS and HSA.

**Note:** You can delete a bank of DASD using the same procedure, but perform the steps for all the DASDs in the bank.

## Dynamically changing I/O devices

To dynamically change a device, use the following general steps:

1. For devices that you plan to change, if you are changing certain fields in the IODF, you must vary devices offline.

To guard against losing I/O access unexpectedly, you must vary offline I/O devices before you activate an IODF that changes the characteristic fields described in [Table 9 on page 88](#). You might need to cancel applications that have a device allocated to get the device offline and TP and CTC devices must also be unallocated.

To change the number of alias UCBs, you must change the control unit type and the device type of all the devices attached to the control unit at the same time. This action requires that all the devices for the control unit are offline at the same time.

<i>Table 9. Dynamic I/O Offline Requirements for Device Characteristic Fields</i>	
<b>Vary the affected I/O components offline before activating a new IODF that changes these device characteristics:</b>	<b>Before activating the new IODF, take the following actions:</b>
<ul style="list-style-type: none"> <li>• Unit Address</li> <li>• Device Type</li> <li>• Subchannel set</li> </ul>	In each logical partition that can access the I/O device, vary the I/O device offline. If a subchannel set is to be changed, ensure you reflect the change in the corresponding operating system configuration.
<ul style="list-style-type: none"> <li>• Connected to CUs</li> </ul>	<p>In each logical partition that will lose access to this I/O device, vary the I/O device offline.</p> <p>In each logical partition that will be able to access the I/O device through other control units, vary offline only the logical paths associated with the control unit.</p>
<ul style="list-style-type: none"> <li>• Device Candidate List</li> </ul>	In each logical partition that will lose access to this I/O device, vary the I/O device offline.

You do **not**, however, have to vary an I/O device offline before activating an IODF when you change any of the following I/O device characteristics:

- Serial Number
  - Description
  - TIME OUT
  - STADET
  - Preferred CHPID
2. After a HyperSwap failover swap has occurred, if a Special Secondary (3390D) device is being changed, ensure that a 3390B PPRC primary device with the same four-digit device number is also being changed. If one device in a Special PPRC pair (3390B/3390D) is not being changed when the other device in the pair is being changed, the dynamic activate will fail.
  3. Describe the new I/O configuration definition in an I/O definition file (IODF) that you create through HCD.
  4. Activate the new IODF.

## Limitations on dynamic changes to I/O devices

Even though a device supports dynamic configuration, the system environment might not allow dynamic changes that would add, modify, or delete the device definition.

- You cannot dynamically add certain devices. These include devices for which device support code was not loaded at IPL.
- You cannot dynamically modify or delete certain devices. These include devices containing data sets that you must never unallocate, such as the device containing the system residence volume or a device that contains a data set in the link list concatenation. Examples of data sets that you must never unallocate include:
  - Common page data sets
  - LPA page data sets
  - SYS1.LINKLIB
  - SYS1.MIGLIB
  - The logrec data set
  - The VIO journaling data set

Other factors that determine whether or not you can use dynamic configuration for a device include:

- A product or program can use a device without accessing it through allocation. If a device supports dynamic configuration, but a product or program that uses that device does not support dynamic configuration, you must not define that device as dynamic.

**Note:** Do not define devices that contain control volumes (CVOLs) as dynamic devices; define them only as installation-static.

- If you plan to use a pair of devices in a dynamic device reconfiguration (DDR) swap, both devices must have the following two attributes in common:
  - Whether the device type supports dynamic configuration
  - Whether the device is defined as dynamic

Any dynamic change that causes a device's UCB to be deleted and added again, causes the device's MIH time interval to be reset to the default MIH setting for its device class. To reestablish the previous MIH interval, enter the SETIOS MIH command when the dynamic change is completed. For information about the SETIOS MIH command, see *z/OS MVS System Commands*.

## Console devices

You can define console devices as dynamic; however:

- You can dynamically delete or modify any device that was defined as a console in the CONSOLxx member of SYS1.PARMLIB at IPL only after the console definition has been removed from the system. For information about methods of removing a console, see *z/OS MVS Planning: Operations*.
- Dynamically added devices may be added to the console configuration as new MCS consoles if the system console configuration is active in distributed operations mode. For more information, see [CONSOLxx \(console configuration definition\)](#) in *z/OS MVS Initialization and Tuning Reference*.

## Considerations for z/OS installed products

Certain products installed with z/OS require that you take additional steps to define a configuration change to the product. If you do not take these additional steps before making a dynamic configuration change, the configuration defined to these products might be out of synchronization with the z/OS configuration definition.

After you dynamically add an I/O device to z/OS, define it to other products through their specific interfaces for defining I/O configurations. For example, to add a Virtual Telecommunications Access Method (VTAM) device:

1. Dynamically add the VTAM device to z/OS.
2. Create a new telecommunication program (TP) topology that includes the VTAM device you are adding.
3. Define that new TP topology to VTAM.

When you delete an I/O device definition, first remove the definition from the related product, then delete the I/O device from z/OS by activating a new configuration definition. For example, to delete a VTAM device:

1. Create a new TP topology that does not include the device you are deleting.
2. Define that new TP topology to VTAM.
3. Dynamically delete the VTAM device from z/OS.

## Dynamically changing Access to Shared devices CTC, FCP, IQD, OSD, OSM, OSN, or OSX

If you do not specify a device candidate list for a CSS to which the device is assigned then Devices assigned to a shared CTC, FCP, IQD, OSD, OSM, OSN, or OSX channel path have a default device candidate list equal to the candidate list for the channel path. This statement excludes reserved LPs (\*). The LPs in the CTC, FCP, IQD, OSD, OSM, OSN, or OSX channel path candidate list are the only LPs in the default device candidate list.

Since these channels have sub-channel maximums, they are treated differently than other channels.

As a result, when changing the CHPID's ACCESS/CANDIDATE list of the aforementioned channel types, an HCD Activate TEST will show that in addition to the Channel Path being modified, the Devices on those channels will be modified. See the following messages for example:

- **CBDA888I** Following devices are to be modified for processor xxxxx: 2.nnnn-2.nnnn
- **CBDA882I** Following channel paths are to be modified for processor xxxxx: 2.PP

More information can be found in the chapter for IOCP Statements and functions (subtopic: Topic IODEVICE) in [Input/Output Configuration Program User's Guide for ICP IOCP \(www.ibm.com/support/pages/inputoutput-configuration-program-users-guide-icp-iocp\)](http://www.ibm.com/support/pages/inputoutput-configuration-program-users-guide-icp-iocp).

## Making dynamic changes to channel paths

You can add, modify, and delete channel path definitions. If you define a device as static or installation-static, you cannot delete or modify the channel path definition to that device.

### Dynamically adding channel paths

To dynamically add a channel path, use the following general steps:

1. Describe the new I/O configuration definition in an I/O definition file (IODF) that you create through HCD. Including a channel path in an IODF adds that I/O component's definition to the I/O configuration definition.
2. Activate the new IODF.
3. Install the new I/O components that you have dynamically added through the new IODF. As required, configure the channel paths.

### Dynamically deleting channel paths

How you dynamically delete a channel path depends on whether or not that channel path shares any control units and devices with one or more other channel paths.

To delete a channel path that is the only channel path attached to all of its devices and control units, use the following steps:

1. Describe the new I/O configuration definition in an I/O definition file (IODF) that you create through HCD. Create an IODF that defines neither the channel path nor its devices and control units.

2. Ensure that the channel path and its devices and control units are not in use by any application.
3. Vary all I/O devices on the channel path offline to z/OS.
4. Configure the channel path offline to z/OS.
5. Physically remove the channel path and all I/O devices and control units on the channel path.
6. Activate the new IODF.

To delete a channel path that is **not** the only channel path attached to its devices and control units, use the following general steps:

1. Describe the new I/O configuration definition in an I/O definition file (IODF) that you create through HCD. Create an IODF that meets both of the following requirements:
  - The new IODF does not define the channel path or the devices and control units attached exclusively on the channel path.
  - The new IODF does define those device and control units also attached on other channel paths.
2. Ensure that no devices and control units on this channel path are in use by this channel path.
3. For all devices not exclusively on this channel path, vary offline to z/OS all device paths through this channel path.
4. Vary offline to z/OS all devices exclusively on this channel path.
5. Configure the channel path offline to z/OS.
6. Physically remove the channel path and the I/O devices and control units **exclusively** on this channel path.
7. Activate the new IODF.

There is a consideration when you delete CF sender channel paths. If a coupling facility is defined in the coupling facility resource management (CFRM) policy and has working connections from a z/OS system to the coupling facility, you cannot make dynamic changes that cause a loss of connectivity to the facility. For example, the system does not allow you to dynamically delete the last operational coupling facility channel path.

To delete the last channel path connected to the coupling facility, use the following general steps:

1. If the coupling facility is in the current CFRM policy, activate a new policy that does not specify the coupling facility. For information about setting up and activating the CFRM policy, see *z/OS MVS Setting Up a Sysplex*.
2. Configure the channel path offline to z/OS.
3. Physically remove the channel path.
4. Activate a new IODF.

## Dynamically changing channel paths

To dynamically change a channel path, use the following general steps:

1. For channel paths that you plan to change, if you are changing **certain** fields in the IODF, you must configure channel paths offline.

To guard against losing I/O access unexpectedly, you must vary offline I/O devices before you activate an IODF that changes the characteristic fields described in [Table 10 on page 92](#):

Table 10. Dynamic I/O Offline Requirements for Channel Path Fields	
Vary the affected components offline before activating a new IODF that changes these channel path characteristics:	Before activating the new IODF, take the following actions:
<ul style="list-style-type: none"> <li>• Channel Path Type</li> <li>• Dynamic Switch ID</li> <li>• Operation Mode</li> <li>• PCHID/VCHID</li> <li>• HCA ID/Port</li> <li>• PNETID</li> <li>• Frame size</li> </ul>	<p>In all logical partitions in your processor complex, configure the channel path offline. If the channel path is the last path to an I/O device, you must vary the device offline before you can configure the channel path offline.</p>
<ul style="list-style-type: none"> <li>• Channel Path Access List</li> <li>• Channel Path Candidate List</li> </ul>	<p>In each logical partition that will lose access to I/O devices on this channel path, do the following:</p> <ol style="list-style-type: none"> <li>For I/O devices that will become inaccessible to the logical partition, vary those I/O devices offline.</li> <li>For I/O devices that will remain accessible by the logical partition through other channel paths, vary offline only the logical paths associated with this channel path.</li> <li>Configure the channel path offline.</li> </ol> <p><b>Note:</b> For coupling facility sender channel paths, you must first vary the CF sender channel path offline to the coupling facility.</p> <p>In all logical partitions that will gain access or continue accessing this channel path, you need not configure or vary anything offline.</p>

**Note:** This table is also valid for spanned channels.

You do **not**, however, have to vary an I/O device offline before activating an IODF when you change any of the following I/O device characteristics:

- Entry Switch Number
  - Entry Port
  - Description
  - Operation mode from shared to spanned, unless the change stops access to the attached devices in some logical channel subsystems.
- Describe the new I/O configuration definition in an I/O definition file (IODF) that you create through HCD.
  - Activate the new IODF.

**Note:** You usually cannot remove a logical partition from a channel path candidate list unless the channel path is offline. You can, however, remove a logical partition, other than your own, from the channel path candidate list for a reconfigurable or shared FICON connection (FC) or coupling facility sender channel path while the channel path is online to the other logical partition if you perform one of the following actions:

- Use the ACTIVATE command with the FORCE(CANDIDATE) parameter.
- On the HCD Activate New Hardware and Software Configuration panel, specify "Yes" in the "Delete partition access to CHPIDs unconditionally (FORCE=CANDIDATE)" field.

## Making dynamic changes to PCIe functions

You can dynamically add, modify, or delete PCIe function definitions.

### ***Dynamically adding PCIe functions***

To dynamically add a PCIe function to the selected processor configuration, use the following general steps:

1. Describe the new processor I/O configuration definition in an I/O definition file (IODF) that you create through HCD. Including a PCIe function in an IODF adds that PCIe function definition to the processor I/O configuration definition.
2. Activate the new IODF using the steps described in [“Dynamically changing an I/O configuration in hardware”](#) on page 81.
3. If needed, install the new I/O adapter supporting the PCIe functions that you have dynamically added through the new IODF.

As required, configure the added PCIe function to the partition where you want to use it and configure it online using the corresponding system commands.

### ***Dynamically deleting PCIe functions***

Whether deletion of a PCIe function may be followed by physical removal of a corresponding PCIe adapter depends on whether or not that PCIe function is sharing an adapter with other PCIe functions.

To dynamically delete a PCIe function, use the following general steps:

1. Ensure that each PCIe function you plan to delete is not needed by any application running in the processor.  
This includes applications running in any logical partition of the processor.
2. Describe the new processor I/O configuration definition in an I/O definition file (IODF) that you create through HCD.  
Create an IODF that does not define the selected PCIe function.
3. Configure all PCIe functions that you intend to delete offline to corresponding operating systems.
4. If the PCIe function is the only or last PCIe function, defined for an PCIe adapter, physically remove the PCIe adapter from your processor.
5. Activate the new IODF using the steps described in [“Dynamically changing an I/O configuration in hardware”](#) on page 81.

### ***Dynamically changing PCIe functions***

To dynamically change a PCIe function, use the following general steps:

1. You do not have to configure the PCIe function offline if you change any of the following function characteristics:
  - description
  - PCIe function candidate list if the partition having the function online is still in the access list
  - PCIe function access list, if the owning logical partition remains in the access list.
2. If any of the fields in a definition of a PCIe function, except the access list, is to be changed, this function must be offline in the processor configuration.
3. If a logical partition with an online PCIe function needs to be deleted from its access list, the PCIe function must be configured offline in this partition prior to dynamic I/O activate.
4. Describe the new I/O configuration in an I/O configuration file (IODF) that you create through HCD that does not contain the PCIe function.
5. Activate the new IODF using the steps described in [“Dynamically changing an I/O configuration in hardware”](#) on page 81.

**Note:** You usually cannot remove a PCIe function from the functions candidate list unless the PCIe function is offline.

You can remove a logical partition other than your own if you perform one of the following actions: ]

- Use the ACTIVATE command with the FORCE(CANDIDATE) parameter.
- One the HCD Activate new Hardware and Software Configuration panel, specify "Yes" in the "Delete partition access tto CHPIDs unconditionally (FORCE=CANDIDATE)" field.

## Making dynamic changes to control units

You can add, modify, and delete control unit definitions.

### Dynamically adding control units

To dynamically add a control unit, use the following general steps:

1. Describe the new I/O configuration definition in an I/O definition file (IODF) that you create through HCD. Including an I/O component in an IODF adds that I/O component's definition to the I/O configuration definition.
2. Activate the new IODF.
3. Install the new I/O components that you have dynamically added through the new IODF. As required, configure the channel paths, format the I/O devices, and vary the I/O components online.

### Dynamically deleting control units

z/OS verifies that the control units are not in use (that the set of all device paths are offline) before deleting the control unit.

How you dynamically delete a control unit depends on whether or not that control unit shares any devices with one or more other control units.

To delete a control unit that is the only control unit attached to **all** its devices, use the following general steps:

1. Describe the new I/O configuration definition in an I/O definition file (IODF) that you create through HCD. Create an IODF that defines neither the control unit nor its attached devices.
2. Ensure that none of the devices on the control unit are in use by any application.
3. Vary all devices on the control unit offline to z/OS.
4. Physically remove the control unit and all its attached devices.
5. Activate the new IODF.

To delete a control unit attached to any devices that are **also** attached to one or more other control units, use the following general steps:

1. Describe the new I/O configuration definition in an I/O definition file (IODF) that you create through HCD. Create an IODF that meets both of the following requirements:
  - The new IODF does not define the control unit or its exclusively attached devices.
  - The new IODF does define those devices also attached to other control units.
2. Ensure that none of the devices exclusively on this control unit are in use by any application.
3. Vary offline to z/OS all devices exclusively on the control unit. For all devices also attached to other control units, vary offline to z/OS all device paths through this control unit.
4. Physically remove the control unit and all its exclusively attached devices.
5. Activate the new IODF.

### Dynamically changing control units

To dynamically change a control unit, use the following general steps:



1. For control units that you plan to change, if you are changing particular fields in the IODF, you must vary attached devices offline.

To guard against losing I/O access unexpectedly, you must vary offline I/O devices before you activate an IODF that changes the characteristic fields described in [Dynamic I/O Offline Requirements for Control Unit Fields](#):

<i>Table 11. Dynamic I/O Offline Requirements for Control Unit Fields</i>	
<b>Vary the affected I/O components offline before activating a new IODF that changes these control unit characteristics:</b>	<b>Before activating the new IODF, take the following actions:</b>
<ul style="list-style-type: none"> <li>• Control unit attachment type</li> <li>• Logical Address</li> <li>• Protocol</li> <li>• I/O Concurrency Level</li> </ul>	<ul style="list-style-type: none"> <li>• Vary offline all I/O devices connected to the control unit. This is required when the attachment type changes, for example, from serial to parallel.</li> </ul>
<ul style="list-style-type: none"> <li>• Channel Path IDs</li> <li>• Link Address</li> </ul>	<p>In each logical partition that will lose access to I/O devices on this control unit, do the following:</p> <ol style="list-style-type: none"> <li>a. For I/O devices that will become inaccessible to the logical partition, vary those I/O devices offline.</li> <li>b. For I/O devices that will remain accessible by the logical partition through other channel paths, vary offline only the logical paths that you are removing from this control unit.</li> </ol>
<ul style="list-style-type: none"> <li>• Unit Addresses (with Ranges and Numbers of Units)</li> </ul>	<p>Before deleting a unit address, vary its associated I/O device offline.</p>

You do not, however, have to vary an I/O device offline before activating an IODF when you change any of the following control unit characteristics:

- Serial Number
  - Description
2. Describe the new I/O configuration definition in an I/O definition file (IODF) that you create through HCD.
  3. Activate the new IODF.

## Making changes to coupling facility devices and control units

Coupling facility devices and control units are defined to represent the connections in the channel subsystem connection to a coupling facility. The coupling facility control unit and device definitions are created in an IODF when you connect CF sender and CF receiver channel paths or two CF peer channel paths using HCD. One coupling facility control unit and two coupling facility devices are defined when you first connect a CF sender channel path to a CF receiver channel path for a coupling facility. Each subsequent channel connection adds two more coupling facility device definitions. For a CF peer channel connection, one control unit and a corresponding number of CF device definitions are generated on one or on both sides of the connection depending on whether the sending function is used on only one or on both sides of the connection. HCD does not create coupling facility devices for connected Infiniband channel paths, defined as STP-only. You do not explicitly add or delete coupling facility devices and control units in the IODF; they are added and deleted based on the CF sender-to-receiver or peer-to-peer channel connections that you make.

To use the coupling facility after you make the connections, a CFRM policy containing the coupling facility must be active. For information about setting up and activating a CFRM policy, see *z/OS MVS Setting Up a Sysplex*.

A CF sender-to-CF receiver or peer-to-peer connection can cause changes to a coupling facility control unit definition. The first path you connect adds the coupling facility control unit and the last path you disconnect deletes the coupling facility control unit, but all other connections and disconnections of channel paths change the control unit definition.

The following sections describe how dynamic changes are made to coupling facility devices and control units when you connect and disconnect channel paths for a processor.

## **Making the first channel path connection for a coupling facility**

When you connect the first CF sender channel path to a CF receiver channel path for a coupling facility, HCD creates a coupling facility control unit and two coupling facility device definitions in an IODF. When you connect the first two CF peer channel paths for a coupling facility, HCD creates a coupling facility control unit and a corresponding number of coupling facility device definitions in an IODF.

Perform the following steps when you connect the first CF sender channel path or CF peer channel path:

1. In HCD, connect a CF sender channel path to a CF receiver channel path, or connect two CF peer channel paths.
2. Accept or change the control unit and device numbers HCD proposes.
3. Activate the new IODF.
4. Install the channel path.
5. To allow the system to use the coupling facility, activate a coupling facility resource management (CFRM) policy that defines the coupling facility, if one is not already activated.
6. Configure the channel path online.

## **Making subsequent channel path connections for a coupling facility**

When you make subsequent CF sender-to-CF receiver channel path connections for a coupling facility, HCD creates two coupling facility device definitions in the IODF. When you make subsequent CF peer-to-peer channel path connections for a coupling facility, HCD creates a corresponding number of coupling facility device definitions in the IODF. When you make subsequent InfiniBand (IFB) CF peer-to-peer channel path connections for a coupling facility, you can choose to create seven or thirty-two coupling facility device definitions in the IODF, regardless of the number of IFB devices chosen earlier for the same control unit. For both the CF sender channel path connection and the CF peer channel path connection, HCD also changes the existing coupling facility control unit definition to reflect the new channel path connection in the IODF.

Perform the following steps when you connect subsequent CF sender or CF peer channel paths:

1. In HCD, connect a CF sender channel path to a CF receiver channel path, or connect two CF peer channel paths.
2. Accept or change the device numbers proposed by HCD.
3. Activate the new IODF.
4. Install the channel path.
5. Configure the channel path online.

## **Breaking a channel path connection that is not the last connection to a coupling facility**

When you disconnect a CF sender channel path connection that is not the last connection for a coupling facility, HCD deletes two coupling facility device definitions in the IODF. When you disconnect a CF peer channel path connection that is not the last connection for a coupling facility, HCD deletes a corresponding number of coupling facility device definitions in the IODF. For both the CF sender channel

path disconnection and the CF peer channel path disconnection, HCD also changes the existing coupling facility control unit definition to reflect the channel path disconnection in the IODF.

Perform the following steps when you disconnect a CF sender or a CF peer channel path that is not the last channel path connection to the coupling facility:

1. Disconnect a CF channel path from the CF receiver channel path, or disconnect the two CF peer channel paths.
2. Configure the disconnected channel path offline.
3. Complete software only changes with hardware validation.

## Breaking the last channel path connection to a coupling facility

When you disconnect the last CF sender channel path connection for a coupling facility, HCD deletes a coupling facility control unit and two coupling facility device definitions in the IODF. When you disconnect the last CF peer channel path connection for a coupling facility, HCD deletes a coupling facility control unit and a corresponding number of device definitions in the IODF.

**Note:** If a coupling facility is defined in the active coupling facility resource management (CFRM) policy, you cannot dynamically delete the coupling facility control unit by disconnecting the last channel paths.

Perform the following steps when you disconnect the last CF sender channel path or the last CF peer channel path from a coupling facility:

1. Quiesce activity to the coupling facility by activating a CFRM policy that does not contain the coupling facility.
2. Disconnect the last CF sender or CF peer channel path from a processor to a coupling facility in the IODF definition.
3. Activate the new IODF.

## Modifying Channel Path Access to a spanned Coupling Facility Channel Path

**Scenario:** Removing ALL images in the Lowest Level CSS from the Access / Candidate List of a spanned CF Channel Path.

When two Coupling CHPIDs are connected in an IODF, HCD establishes the connected path (CPATH) mapping of the Logical Connection between two Channel Subsystems in the definitions of both the source and the target coupling channel paths. If one of the connected coupling paths or both connected paths are spanned, the corresponding CPATH mapping points to the Lowest Level CSS ID that may have access to the peer channel path. The Lowest Level CSS allows Connectivity to ALL CSS's even though the CPATH references the lowest level CSS.

**Example 1:** Based on IOCP CHPID statements for ICP channel paths, defined in the same processor configuration:

HCD Panel:

```

                                CF Channel Path Connectivity List
Command ==> _____

Select one or more channel paths, then press Enter.
Source processor ID . . . . . : A89
Source channel subsystem ID . : 1

Source partition name . . . . : *

-----Source-----      -----Destination-----      -CU-  -#-
/ CHP CHID  CF Type Mode Occ  Proc.CSSID CHP CHID  CF Type Mode  Type Dev
_ EB        N  ICP  SPAN N    A89.0      EE        Y  ICP  DED    CFP  7

```

Coupling connections of the target processor always specify the lowest connected CSS of the source processor. This is depicted through the CPATH mapping on the CHPID statement in each of the two processor configurations. Here are examples of Source ICP Path EB and Target ICP Path EE:

**Source ICP Path EB:** spanned, connected to Target ICP Path EE

```
CHPID PATH=(CSS(1,2),EB),SHARED,TYPE=ICP,
PARTITION=((CSS(1),(SY1,SY2),(=)),(CSS(2),(SYE,SYP),(=))),
CPATH=(CSS(0),EE)
```

**Target ICP Path EE:** dedicated, connected to Source ICP Path EB

```
CHPID PATH=(CSS(0),EE),TYPE=ICP
PARTITION=((CFPART1),(=)),
CPATH=(CSS(1),EB)
```

Notice that the CPATH mapping on the CHPID statement for CF path EE points to CSS1. CSS 1 is known as the Lowest Level CSS ID.

If the Channel Path Access or/and Candidate List of a Coupling Facility Channel path changes in such a way that ALL of the Lowest Level CSS images are removed from that Channel Path through HCD, a subsequent Dynamic Activate will result in the Channel Path on the Connected Side to be DELETED and then RE-ADDED.

The following example illustrates the CPATH mapping change on the target CHPID definition for Path EE after ALL of the Lowest Level CSS images (images in CSS 1) are removed from the source CHPID definition for Path EB.

**Source ICP Path EB:** shared, connected to Target ICP Path EE

```
CHPID PATH=(CSS(2),EB),SHARED,TYPE=ICP,
PARTITION=((CSS(2),(SYE,SYP),(=))),
CPATH=(CSS(0),EE)
```

**Target ICP Path EE:** dedicated, connected to Source ICP Path EB

```
CHPID PATH=(CSS(0),EE),TYPE=ICP
PARTITION=((CFPART1),(=)),
CPATH=(CSS(2),EB)
```

This change, affecting the both sides, requires activate of the updated configuration, as it follows from HCD Message CBDG422I. In this case of ICP paths, only one processor configuration is involved. During activate, CHPID EE will be DELETED and then RE-ADDED. Therefore, the systems in CSS2, connected to a CF in CSS 0 via CHPID EE will lose connectivity if CHPID EE is not configured OFFLINE first. This ACTION will result in a loss of connectivity if either side of the CF Connecting CHPIDs are ONLINE during the Dynamic Activate. Depending on the configuration this could potentially result in z/OS image outage(s).

**Example 2:** The Lowest Level CSS Id change with external spanned coupling paths, connecting two different processors A89 and T89.

HCD Panels:

CF Channel Path Connectivity List Row 49 of 82  
Command ==> \_\_\_\_\_ Scroll ==> CSR

Select one or more channel paths, then press Enter.

Source processor ID . . . . : A89      A89  
Source channel subsystem ID . : 0  
Source partition name . . . . : \*

-----Source-----					-----Destination-----					-CU-	-#-			
/	CHP	CHID	CF	Type Mode Occ	Proc.	CSSID	CHP	CHID	CF	Type Mode	Type	Dev		
_	DC	06/1	Y	CS5	SPAN	N	T89.0	B0	15/1	Y	CS5	SPAN	CFP	8

Coupling connections of the target processor always specify the lowest connected CSS of the source processor. This is depicted using the CPATH mapping on the CHPID statement in each of the two processor configurations.

**Processor Configuration A89**

Source CS5 Path DC: spanned, connected to Target CS5 Path B0

```
CHPID PATH=(CSS(0,1,2),DC),SHARED,AID=06,PORT=1,TYPE=CS5,
```

```

PARTITION=((CSS(0),(S51,S50,S5A),(=)),
           (CSS(1),(S52,S53,S5D),(=)),
           (CSS(2),(S54,S55,S5E),(=))),
CPATH=(CSS(0),B0),CSYSTEM=T89

```

#### Processor Configuration T89

Target CS5 Path DC: spanned, connected to Source CS5 Path B0

```

CHIPID PATH=(CSS(0,1,2),B0),SHARED,AID=15,PORT=1,TYPE=CS5,
PARTITION=((CSS(0),(S51,S50,S5A),(=)),
           (CSS(1),(S52,S53,S5D),(=)),
           (CSS(2),(S54,S55,S5E),(=))),
CPATH=(CSS(0),DC),CSYSTEM=A89

```

If ALL IMAGES in CSS 0 are removed from the access list of CHIPID DC, the Connected CHANNEL B0 requires that a new CPATH is generated, connecting the channel to the lowest level CSS. For example, removing CSS 0 ACCESS (lowest CSS) to CHIPID DC - NEW CPATH required from CONNECTED PATH B0 on connected machine. This type of change will result in HCD Message CBDG422I.

These are changed IOCP CHIPID statements after CSS 0 is gone in the definition of Path DC in the A89 processor configuration.

#### Processor Configuration A89

Source CS5 Path DC: spanned, connected to Target CS5 Path B0

```

CHIPID PATH=(CSS(1,2),DC),SHARED,AID=06,PORT=1,TYPE=CS5,
PARTITION=((CSS(1),(S52,S53,S5D),(=)),
           (CSS(2),(S54,S55,S5E),(=))),
CPATH=(CSS(0),B0),CSYSTEM=T89

```

#### Processor Configuration T89

Target ICP Path EE: dedicated, connected to Source ICP Path EB

```

CHIPID PATH=(CSS(0,1,2),B0),SHARED,AID=15,PORT=1,TYPE=CS5,
PARTITION=((CSS(0),(S51,S50,S5A),(=)),
           (CSS(1),(S52,S53,S5D),(=)),
           (CSS(2),(S54,S55,S5E),(=))),
CPATH=(CSS(1),DC),CSYSTEM=A89 --> Note: CPATH now contains CSS 1

```

The CHIPID B0 on processor T89 will need to be DELETED and then RE\_ADDED on processor T89 via a Dynamic Activate. Therefore the systems connected to T89 via CHIPID B0 will lose connectivity if CHIPID B0 is not configured OFFLINE first. This ACTION will result in a loss of connectivity if either side of the CF Connecting CHIPIDs are ONLINE during the Dynamic Activate.

**Note:** This type of Configuration change will require a Hardware Activate on both A89 and T89.

## Dynamic I/O configuration in a multiple LCSS environment

You can use multiple logical channel subsystems (LCSS) on a supported IBM Z processor. A z/OS system can do a dynamic ACTIVATE of hardware for any LCSS.

## Hardware Activate performance considerations

Dynamic changes, such as adding or deleting devices or device paths, can impact the performance of the system on which the ACTIVATE command is issued. Also, when other images on the CPC process the hardware changes, those images might encounter a spike in CPU consumption.

Generally, the more devices and device paths that you add or delete, the more CPU consumption increases, specifically for the IOSAS and MASTER address spaces. The system processes these changes at the highest priority, which can impact other high priority work in your system, such as XCF signaling, TCP/IP, and VTAM. Thus, large activate requests that involve tens of thousands of changes can cause other high priority work to stall temporarily.

If your system is constrained or running on a single CPC, consider making dynamic changes in smaller increments to avoid impacts to CPU performance.

## Dynamic I/O - Hardware Changes Only

HCD can activate hardware changes dynamically on all processors that are running HCD. However, there are processors that are not running any operating system that runs HCD. Currently, HCD can **ONLY** target a “Hardware Change Only” to a processor that is a SACF processor. The activation of “Hardware Changes Only” enables HCD running on z/OS to communicate with these processors via "Control Code" to manage the dynamic I/O changes on the processor.

### Prerequisites

For a SACF, the process to allow a dynamic change requires the following prerequisites:

1. Stand alone coupling facility (SACF) and a z/OS server with required EC levels.
  2. Install the necessary software support levels. For example, install the PTF's for the SA CF and z/OS servers. For more information, see the scenarios in [“Scenarios for Dynamically changing an IO configuration in hardware”](#) on page 101.
  3. Provide the necessary authorization rights on the z/OS system that you use to initiate the hardware only activation. See [Defining RACF profiles in z/OS HCD User's Guide](#).
  4. You must build new IODF/IOCDS that includes a Master Control Services (MCS) LPAR image that is a firmware based version of HCD, that is actually running on the z Server as opposed to running under z/OS. This MCS LPAR contains the code responsible for performing dynamic activation of hardware changes on the SACF. The MCS LPAR image must be defined as follows:
    - MUST have Partition Name = MCS\_1
    - MUST specify Partition Number = B for highest CSS available (model dependent)
    - MUST specify Partition Usage = FW
- Note:** The MCS LPAR does not consume additional customer processor or memory resources. It will use a pool of internal resources that are provided with the z14 hardware and firmware.
5. Verify that RESET ACTIVATION profile has dynamic enabled.
  6. A one time Activation of the CPC (POR) with the IOCDS built in step 4 on the Standalone CF is required.

Once the prerequisites are met, the system that is not running z/OS can be the target of a **hardware-changes only** type of change.

### Performing a hardware-only dynamic activate

To perform the hardware-only dynamic active, go to the "Processor Cluster List" (option 2.11) on which the following two action are relevant to hardware-only changes:

- View current active configuration (action code 'c')
- Activate hardware-only changes (action code 'a')

#### View current active configuration (action code 'c')

HCD shows information of the actual active configuration.

```
View Active Configuration
CBDPDY60

Source IODF . . . . . : HCI.IODFAA
Processor ID . . . . . : BOESCLY

HSA token . . . . . : BOESCLY 17-03-14 03:14:15 HCI      IODFAA

Recovery required . . . : No
Target IODF . . . . . :
Processor ID . . . . . :

F1=Help      F2=Split      F3=Exit      F9=Swap      F12=Cancel
```

HCD allows you to view the name and status of the IODF that has been used for the POR or the last dynamic activation. The configuration token, which is currently active in the HSA (hardware system area) is shown as well as if the information IF recovery is required.

If recovery is required, the name of the target IODF name and target processor ID will be displayed for the dynamic change that was in progress when the activation failed.

## Activate hardware-only changes (action code 'a')

HCD reads the activation status of the selected CPC.

If this status can be retrieved and is OK, then the "Activate New Hardware Configuration" panel is shown on which parameters for the activation can be specified.

If the activation status can be retrieved, but the system is in recovery state, the "Recover Hardware Only Activation" panel is shown.

The target "Processor ID" is promotable with all processor configurations in the selected tared IODF and allows hardware-only activation.

```

                                Activate New Hardware Configuration
CBDDPDY50

Specify or revise the values for IODF activation.

Source IODF . . . . . : SYS4.IODFAA
Processor ID . . . . . : BOESCLY

Target IODF . . . . . : SYS4.IODF00
Processor ID . . . . . : ECL2      +

Test only . . . . . Yes (Yes or No)
Allow hardware deletes (FORCE, FORCE=DEVICE) . . . . No (Yes or No)
Delete partition access to CHPIDs unconditionally
(FORCE=CANDIDATE) . . . . . No (Yes or No)

F1=Help      F2=Split    F3=Exit      F4=Prompt    F5=Reset    F9=Swap
F12=Cancel

```

Once you confirm the activation parameters by pressing enter, the dynamic activation for the remote processor is initiated by HCD. HCD then issues an information message on the panel that the operation is in process.

## Recommendation

IBM recommends the use of a common IODF and issuing the Hardware Change Only FIRST. Once that change is complete Activate New Images and or Config new channels online to Standalone CF.

Next ACTIVATE IODF's on z/OS images just as in the past. For example, software changes in all images and hardware change in the last image per CPU.

**Note:** Always test configuration changes first. See [Chapter 4, “Dynamically changing an I/O configuration,”](#) on page 77 for more information regarding best practices.

## Scenarios for Dynamically changing an IO configuration in hardware

### Scenario 1 - Setting up and Preparing for a Hardware Change Only

There are a number of steps for you to follow in order to prepare for a hardware change only:

1. Install Standalone CF server and z/OS/HCD Server at the required EC levels and ensure that hardware dependencies are met.
2. Install the necessary HCD and IOCP PTF's for z/OS and select the **GA2** processor level in HCD.
3. Provide the necessary authorization rights on your z/OS system that you use to initiate the Hardware Only Activation.

4. Define an MCS partition named "MCS\_1".
5. Write new IOCDS that includes an MCS\_1 partition.
6. Activate CPC (POR) with a new IOCDS.
7. After the initial update to POR, update the Reset Profile - select use Active IOCDS.

## Step 1. Install correct Standalone CF server and z/OS Server at required EC Levels – Hardware Dependencies

Firmware EC P41414 (on local and remote server) → SE, HMC version 2.14.1.

Hardware Dependencies – HCD running in real (= not hypervized) local LPAR – (local and remote) z14 GA2 server

## Step 2. Install necessary HCD and IOCP PTF's for appropriate levels and select GA2 processor level in HCD.

Install HCD APAR OA54912 and IOCP APAR OA55404. The HCD APAR install requires IPL due to changes to SYS1.NUCLEUS. Ensure that the Standalone CF machine has the correct support level selected.

```
Goto  Filter  Backup  Query  Help
                          Change Processor Definition

                          Available Support Levels
                          Row 1 of 2 More:      >

Command ===> -----

Select the processor support level which provides the processor
capabilities you want to use.

Support Level
3907 support
3907 GA2 support      <----
***** Bottom of data *****

Local system name . . . . . NORMA
```

Figure 23. HCD option 1.3 - Processors - Change (c)

## Step 3. Provide the necessary authorization rights on your z/OS system that you use to initiate the hardware only activation

See [Defining RACF profiles in z/OS HCD User's Guide](#).

## Step 4: Define an MCS partition named MCS\_1

Using HCD, define an MCS\_1 (Master Control Service) partition of type FW (Firmware) in LPAR (Logical partition) number B of highest Channel Subsystem on the CF.

At the appropriate firmware level this partition contains the code responsible for dynamic activation of hardware changes.

For example, if you are defining the MCS\_1 Partition for the first time, you'll need to do the following:

1. Using HCD, select the highest CSS id for the Standalone CF.
2. Change the partition name of image number B from \* to MCS\_1.
3. Set the UID Uniqueness to NO.
4. Set the Usage type to FW.



## 5. Build a new production IODF.

```

      Partition List
  Goto  Backup  Query  Help
-----
Command ==> _____ Row 1 of 15
                               Scroll ==> PAGE

Select one or more partitions, then press Enter. To add, use F11.

Processor ID . . . . : NORMA      Norma Stand Alone CF
Configuration mode . : LPAR
Channel Subsystem ID : 2

/ Partition Name  Number Usage + UID Description
- MCS_1          B      FW      N -----
- *              1      CF/OS    N -----
- *              2      CF/OS    N -----
- *              3      CF/OS    N -----

```

Figure 24. Example of defining the MCS\_1 Partition for the first time

### Step 5. Using HCD to write a new IOCDS.

To write a new IOCDS, you must take the following steps:

1. Use the IODF you created in “Step 4: Define an MCS partition named MCS\_1” on page 102 and write an IOCDS to the Standalone CF.
2. Use HCD 2.11 and select work with IOCDS.

```

  Goto  Query  Help
-----
      Actions on selected CPCs

Command ==> _____

Select one or 1_ 1. Work with IOCDSs . . . . . (s)
-----      2. Work with IPL attributes . . . . . (i)
/ SNA Address 3. Select other processor configuration (p)
/ IBM390PS.NO 4. Work with CPC images . . . . . (v)
*****        5. Activate hardware changes only to SACF(a)
              6. View current active configuration . . (c)
              7. Download active configuration . . . (d)

```

```

                                IOCDS List          Row 1 of 4 More:  >
Command ==> _____ Scroll ==> PAGE

Select one or a group of IOCDSs, then press Enter.

/ IOCDS      Name      Type      Status      -----Token Match----- Write
- A0.NORMA   IODF31     LPAR      Alternate   No          Yes          No
- A1.NORMA   IODF28     LPAR      Alternate   No          No           No
- A2.NORMA   IODF29     LPAR      Alternate   No          No           No
- A3.NORMA   IODF30     LPAR      POR         Yes         No           Yes-POR
***** Bottom of data *****

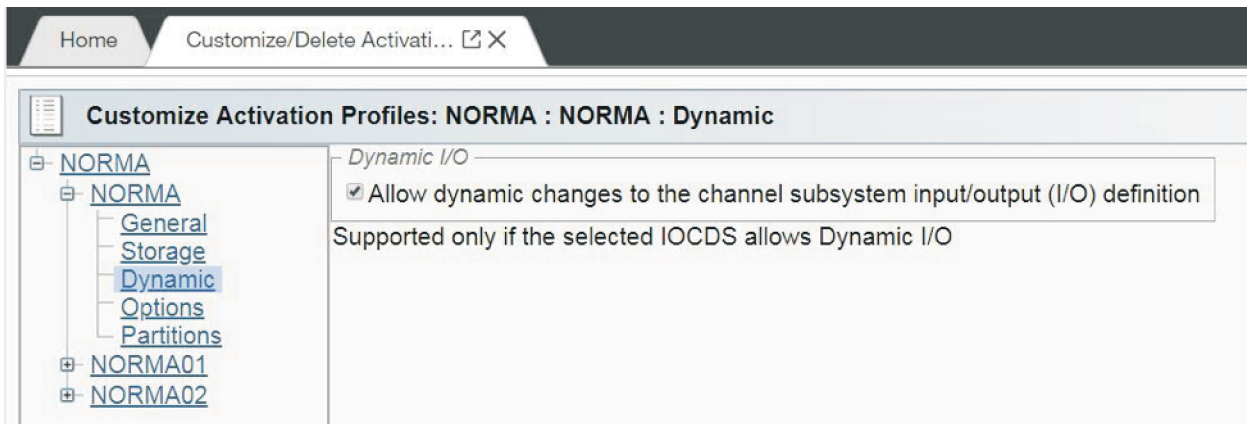
```

Figure 25. Example of using HCD to write a new IOCDS

### Step 6. Activate CPC (POR) with a new IOCDS

Verify that the RESET ACTIVATION profile has dynamic enabled.

Figure 26. Example of the RESET ACTIVATION profile



## Section 7: After initial POR update the RESET Profile by selecting "Use Active IOCDs".

This is necessary for future Activation/POR's in order for POR to complete using the most current IOCDs that was activated/written via HCD.

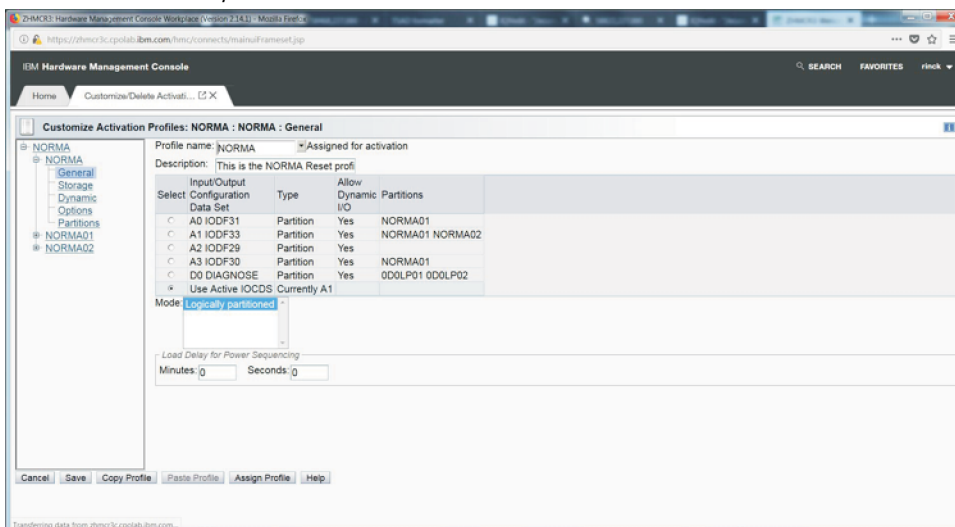


Figure 27. Example of the RESET Profile

## Scenario 2 - Activating Hardware Changes Only

There are a number of steps for you to follow in order to activate a hardware change only:

1. Make desired connectivity changes in your production IODF.
2.
  - a. Activate Hardware Changes Only with TEST (TEST = YES) on Stand Alone CF.
  - b. Activate Hardware Changes Only without TEST (TEST = NO ) on Stand Alone CF \*use FORCE when deleting resources.
3.
  - a. Write new IOCDs to Standalone CF.
  - b. Switch to new IOCDs.
  - c. Ensure "Use Active IOCDs" is selected in the RESET profile.
4. Configure newly added HW to Standalone CF.
5. Activate IODF using recommended approach in z/OS images. For example:
  - Software changes (with VALIDATE) in all images and hardware change in the last image per CPU.
  - Write IOCDs's to z/OS CPU's and Switch.
6. Configure newly defined z/OS link(s) online to z/OS images.

## Step 1. Make desired connectivity changes in your production IODF.

```

Goto  Backup  Query  Help
-      Partition List
      Goto  Backup  Query  Help
-----
Command ==> _____ Row 1 of 15
                          Scroll ==> PAGE

Select one or more partitions, then press Enter. To add, use F11.

Processor ID . . . . : NORMA      Norma Stand Alone CF
Configuration mode . : LPAR
Channel Subsystem ID : 0

Partition Name  Number Usage + UID Description
NORMA01         1      CF   N   ITS0 CF75
NORMA02         2      CF   N   ITS0 CF74 □-----
*               3      CF/OS N   -----
*               4      CF/OS N   -----
*               5      CF/OS N   -----
*               6      CF/OS N   -----
*               7      CF/OS N   -----
*               8      CF/OS N   -----
*               9      CF/OS N   -----
*               A      CF/OS N   -----

```

Figure 28. Example of adding image NORMA02 to processor NORMA

```

Goto  Filter  Backup  Query  Help
      Change Channel Path Definition

Specify or revise the following values.

Processor ID . . . . : NORMA      Norma Stand Alone CF
Configuration mode . : LPAR
Channel Subsystem ID : 0

Channel path ID . . . . E1      +      Channel ID ___ +
Channel path type . . . . CS5    +
Operation mode . . . . SHR      +
Managed . . . . . No (Yes or No) I/O Cluster _____ +
Description . . . . . A09B-LG07

Specify the following values only if connected to a switch:

Dynamic entry switch ID ___ + (00 - FF)
Entry switch ID . . . . ___ +
Entry port . . . . . ___ +

```

Figure 29. Example of adding CHPID E1 and E9 to processor NORMA

```

Goto  Filter  Backup  Query  Help
                          Change Channel Path Definition

Specify or revise the following values.

Processor ID . . . . : NORMA          Norma Stand Alone CF
Configuration mode . : LPAR
Channel Subsystem ID : 0

Channel path ID . . . . E9      +          Channel ID  11C
Channel path type . . . . CL5    +
Operation mode . . . . . SHR    +
Managed . . . . . No      (Yes or No)   I/O Cluster  _____
Description . . . . . A14B-10

Specify the following values only if connected to a switch:

Dynamic entry switch ID __ + (00 - FF)
Entry switch ID . . . . __ +
Entry port . . . . . __ +

```

Figure 30. Example of adding CHPID E1 and E9 to processor NORMA

```

Goto  Filter  Backup  Query  Help
-----
                          CF Channel Path Connectivity List          Row 1 of 6
Command ==> _____ Scroll ==> PAGE

Select one or more channel paths, then press Enter.

Source processor ID . . . . : NORMA          Norma Stand Alone CF
Source channel subsystem ID . : 0
Source partition name . . . . : *

-----Source-----
/ CHP CHID  CF Type Mode Occ  Proc.CSSID CHP CHID  CF Type Mode  -CU-  -#-
- E0  14/1  Y  CS5  SHR  N    CETUS.2   E4  2F/1  N  CS5  SHR  CFP   8
- E1  14/1  Y  CS5  SHR  N    CETUS.2   E6  2F/1  N  CS5  SHR  CFP   8 <-----
- E4  16/1  Y  CS5  SHR  N    MUSCA.1   E1  12/2  Y  CS5  SHR  STP
- E8  11C/1 Y  CL5  SHR  N    CETUS.2   E9  13C/2 N  CL5  SHR  CFP   8
- E9  11C/1 Y  CL5  SHR  N    CETUS.2   EA  13C/2 N  CL5  SHR  CFP   8 <-----
- EC  13C/1 Y  CL5  SHR  N    MUSCA.1   E9  124/2 Y  CL5  SHR  STP
***** Bottom of data *****

```

Figure 31. Channel Path Connectivity List from HCD

## Step 2a. Activate new hardware configuration with TEST

**Note:** Always TEST configuration changes first by using HCD Option 2.11.

```

                          z/OS V2.3 HCD
Command ==> _____

                          Hardware Configuration

Select one of the following.

  0. Edit profile options and policies
  1. Define, modify, or view configuration data
  2. Activate or process configuration data
  3. Print or compare configuration data
  4. Create or view graphical configuration report
  5. Migrate configuration data
  6. Maintain I/O definition files
  7. Query supported hardware and installed UIMs
  8. Getting started with this dialog
  9. What's new in this release

For options 1 to 5, specify the name of the IODF to be used.

I/O definition file . . . 'SYS9.IODF33'

```

Figure 32. Hardware Configuration

z/OS V2.5 HCD  
Activate or Process Configuration Data -----

Select one of the following tasks.

- 1. Build production I/O definition file
- 2. Build IOCDs
- 3. Build IOCP input data set
- 4. Create JES3 initialization stream data
- 5. View active configuration
- 6. Activate or verify configuration dynamically
- 7. Activate configuration sysplex-wide
- 8. (no longer supported)
- 9. (no longer supported)
- 10. Build I/O configuration data
- 11. Build and manage processor cluster IOCDs, IPL attributes and dynamic I/O changes
- 12. Build validated work I/O definition file

\* = requires TSA I/O Operations

Figure 33. Activate or Process Configuration Data

Select HCD Option 5 - Activate Hardware Changes Only

```

Goto  Query  Help
                Actions on selected CPCs

Command ==>
Select one or   Select by number or action code and press Enter.
-----
SNA Address    1. Work with IOCDs . . . . . (s)
IBM390PS.CE    2. Work with IPL attributes . . . . . (i)
IBM390PS.LE    3. Select other processor configuration (p)
IBM390PS.MU    4. Work with CPC images . . . . . (v)
IBM390PS.NO    5. Activate Hardware changes only to SACF(a) <-----
                6. View current active configuration . . (c)
                7. Download active configuration . . . .
(d)
```

Figure 34. Activate Hardware Changes Only

```

Goto  Query  Help
                Activate New Hardware
Configuration
Specify or revise the values for IODF activation.

Source IODF . . . . . : SYS9.IODF31
Processor ID . . . . . : NORMA

Target IODF . . . . . : SYS9.IODF33
Processor ID . . . . . : NORMA      +

Test only . . . . . Yes (Yes or No)      <-----
Allow hardware deletes (FORCE, FORCE=DEVICE) . . . No (Yes or No)
Delete partition access to CHPIDs unconditionally
(FORCE=CANDIDATE) . . . . . No (Yes or No)
```

Figure 35. Activate New Hardware Configuration

Messages:

```

                                Message List
Save  Query  Help
-----
Command ==> _____ Row 1 of 8
                                Scroll ==> PAGE
Messages are sorted by severity. Select one or more, then press Enter.

Sev Msg. ID  Message Text
CBDA880I Dynamic activate request contains modifications to
          functions or CF connections. Ensure that S/W changes are
          done prior to H/W changes.
CBDA881I Following channel paths are to be added to processor
          NORMA: 0.E1,0.E9
CBDA899I Following partitions are to be added to processor NORMA:
          0.NORMA02
CBDD800I All change requests were successfully executed.

```

Figure 36. Message List

## Step 2. Activate new hardware configuration without TEST

```

Goto  Query  Help
                                Activate New Hardware
Configuration
Specify or revise the values for IODF activation.

Source IODF . . . . . : SYS9.IODF31
Processor ID . . . . . : NORMA

Target IODF . . . . . : SYS9.IODF33
Processor ID . . . . . : NORMA      +

Test only . . . . . NO      (Yes or No)
Allow hardware deletes (FORCE, FORCE=DEVICE) . . . No      (Yes or No)
Delete partition access to CHPIDs unconditionally
(FORCE=CANDIDATE) . . . . . No      (Yes or No)

```

Figure 37. Activate New Hardware Configuration

```

                                Message List
Save  Query  Help
-----
Command ==> _____ Row 1 of 5
                                Scroll ==> PAGE
Messages are sorted by severity. Select one or more, then press Enter.

Sev Msg. ID  Message Text
CBDA881I Following channel paths are to be added to processor
          NORMA: 0.E1,0.E9
CBDA899I Following partitions are to be added to processor NORMA:
          0.NORMA02
CBDD800I All change requests were successfully executed.
***** Bottom of data *****
*****

```

Figure 38. Message List

### Step 3a. Write new IOCDS to Standalone CF - from option 2.11

```
Goto Query Help
-----
                        Actions on selected CPCs

Command ==>
Select one or
-----
SNA Address
IBM390PS.CE
IBM390PS.LE
IBM390PS.MU
IBM390PS.NO
*****
1_ 1. Work with IOCDSs . . . . . (s)
   2. Work with IPL attributes . . . . . (i)
   3. Select other processor configuration (p)
   4. Work with CPC images . . . . . (v)
   5. Activate hardware changes only to SACF(a)
   6. View current active configuration . . (c)
   7. Download active configuration . . . (d)
```

Figure 39. Write a new IOCDS to Standalone CF - from option 2.11

```
Goto Query Help
-----
                        Actions on selected IOCDSs

Command ==>
Select one or
-----
IOCDS
A0.NORMA
A1.NORMA
A2.NORMA
A3.NORMA
1. Update IOCDS . . . . . (u)
2. Switch IOCDS . . . . . (s)
3. Enable write protection . . . . . (e)
4. Disable write protection . . . . . (w)
```

Figure 40. Write a new IOCDS to Standalone CF - from option 2.11

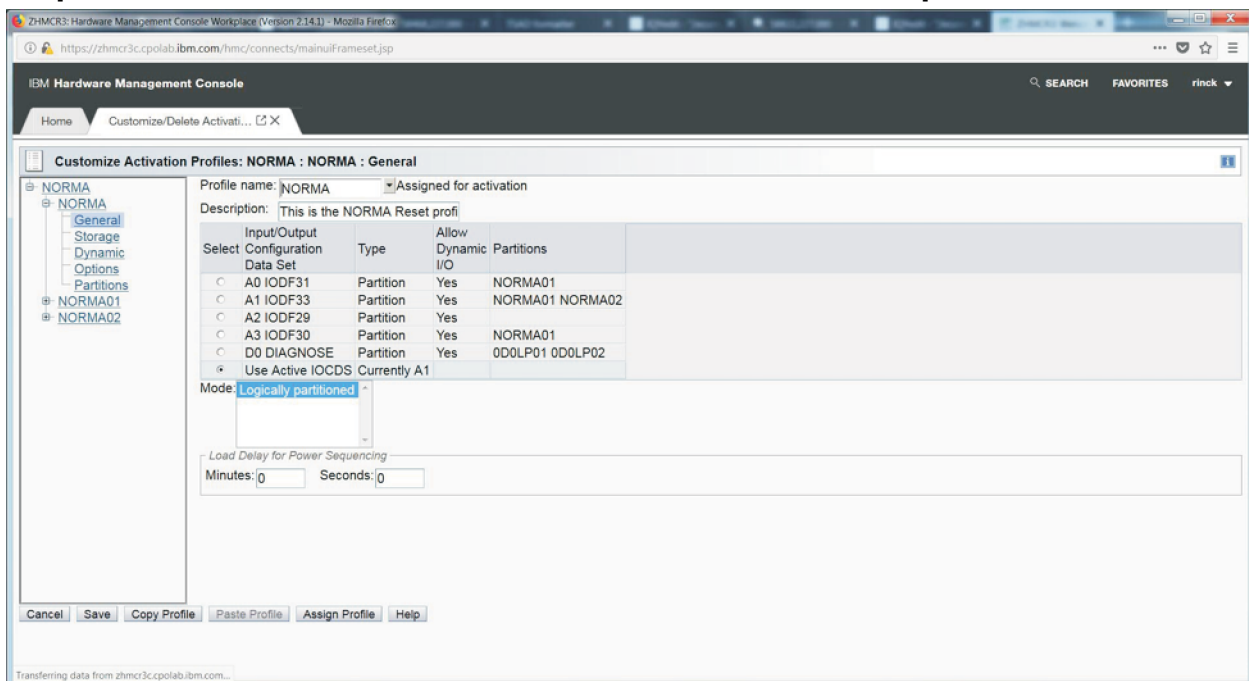
### Step 3b. Switch to newly written IOCDS

```
Goto Query Help
-----
                        Actions on selected IOCDS

Command ==>
Select one or
-----
IOCDS
A0.NORMA
A1.NORMA
A2.NORMA
A3.NORMA
2_ 1. Update IOCDS . . . . . (u)
   2. Switch IOCDS . . . . . (s)
   3. Enable write protection . . . . . (e)
   4. Disable write protection . . . . . (w)
```

Figure 41. Switch to newly written IOCDS

### Step 3c. Ensure "Use Active IOCDs" is selected in the RESET profile



### Step 4. Configure newly added HW to Standalone CF and/or Activate New Image

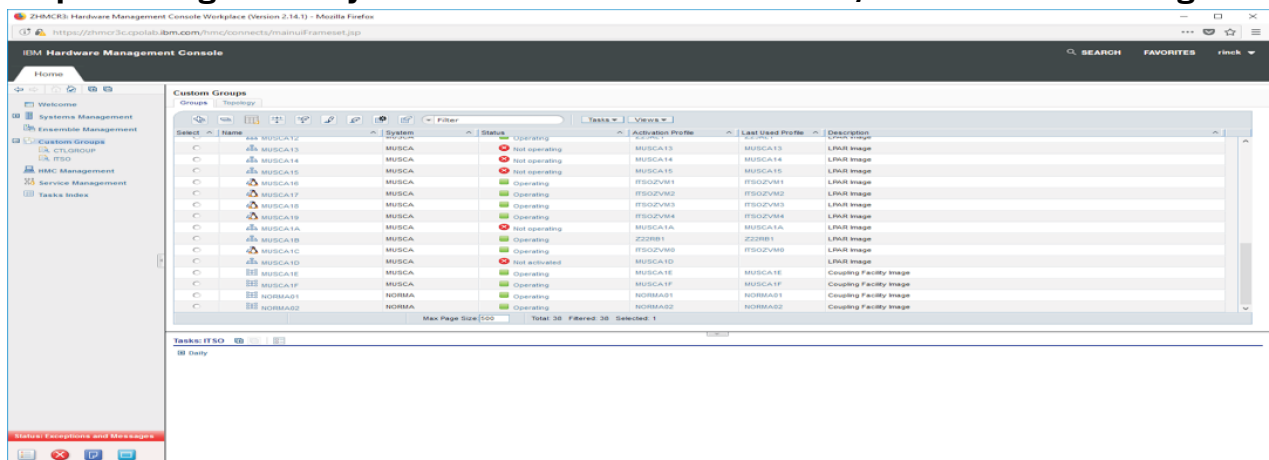


Figure 42. Configure newly added HW to Standalone CF

Configure Channels online from Operating System Messages task for the Coupling Facility image if not already online. Then verify that they are online from a SA CF image.



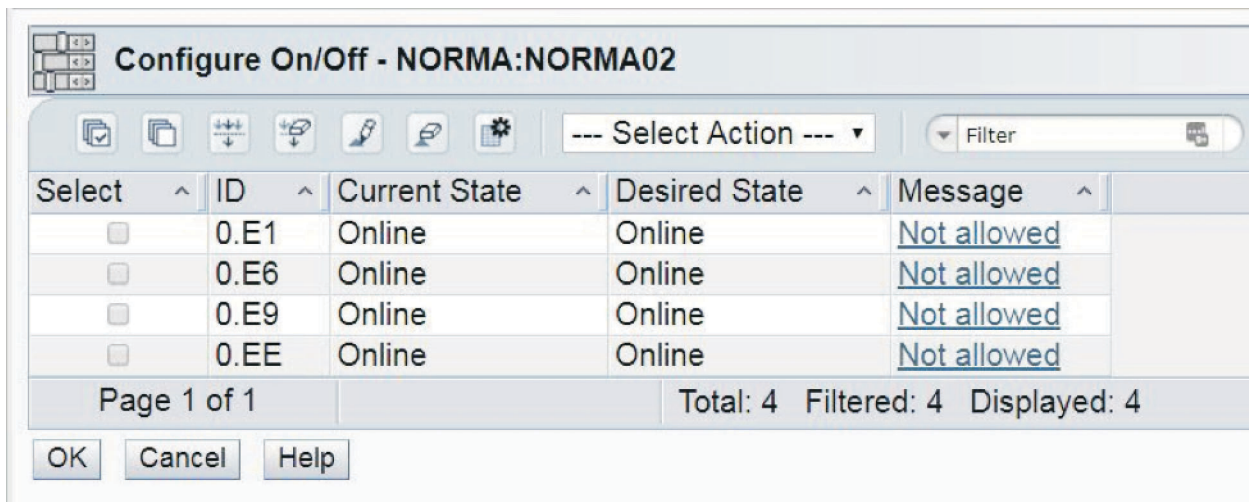


Figure 43. Verify that the channels are online from a SA CF Image

### Step 5. Activate IODF using recommended approach in z/OS images

Software changes (with VALIDATE) in all images and hardware change in the last image per CPU. Write IOCDs's to z/OS CPU's and Switch.

### Step 6. Ensure newly added links are ONLINE to z/OS images

D M=CHP from CPU - CETUS (z/OS image) going to CF74 (image NORMA02).

D M=CHP(E6)

```
IEE174I 12.05.49 DISPLAY M 641
CHPID E6: TYPE=33, DESC=COUPLING OVER PCIE, ONLINE
COUPLING FACILITY 003907.IBM.02.00000001B8F8
                PARTITION: 02 CPCID: 00
NAMED CF74      CONTROL UNIT ID: FFF0
```

PATH	PHYSICAL	LOGICAL	CHANNEL TYPE	CAID	PORT
E6 / 0512	ONLINE	ONLINE	CS5 8X-PCIE3	002F	01

```
COUPLING FACILITY SUBCHANNEL STATUS
TOTAL: 16 IN USE: 16 NOT USING: 0 NOT USABLE: 0
OPERATIONAL DEVICES / SUBCHANNELS:
FF3A / 3E6E FF3B / 3E6F FF3C / 3E70 FF3D / 3E71
FF3E / 3E72 FF3F / 3E73 FF40 / 3E74 FF41 / 3E75
FF42 / 3E76 FF43 / 3E77 FF44 / 3E78 FF45 / 3E79
FF46 / 3E7A FF47 / 3E7B FF48 / 3E7C FF49 / 3E7D
```

D M=CHP(EA)

```
IEE174I 12.06.22 DISPLAY M 643
CHPID EA: TYPE=34, DESC=COUPLING OVER ROCE, ONLINE
COUPLING FACILITY 003907.IBM.02.00000001B8F8
                PARTITION: 02 CPCID: 00
NAMED CF74      CONTROL UNIT ID: FFF0
```

PATH	PHYSICAL	LOGICAL	CHANNEL TYPE	CAID	PORT
EA / 0513	ONLINE	ONLINE	CL5 10GbE-RoCE	013C	02

```
COUPLING FACILITY SUBCHANNEL STATUS
TOTAL: 16 IN USE: 16 NOT USING: 0 NOT USABLE: 0
OPERATIONAL DEVICES / SUBCHANNELS:
FF3A / 3E6E FF3B / 3E6F FF3C / 3E70 FF3D / 3E71
FF3E / 3E72 FF3F / 3E73 FF40 / 3E74 FF41 / 3E75
FF42 / 3E76 FF43 / 3E77 FF44 / 3E78 FF45 / 3E79
FF46 / 3E7A FF47 / 3E7B FF48 / 3E7C FF49 / 3E7D
```

Figure 44. Newly added links are ONLINE to z/OS images

## Testing dynamic activation

---

When you dynamically activate a new I/O configuration, you can choose to first run in test mode, to see if the activation will run. If the test indicates a problem, HCD displays error messages at the terminal. The results of testing dynamic activation are relevant for the system when a new I/O configuration is tested. Results of testing depend on the I/O configuration of a selected logical partition.

The test function includes the following checks:

- The IODF specified for activation exists and is a production IODF.
- The IODF is allocated in a single extent. Otherwise, HCD issues message CBDA009I to warn you that IPLing with a multiple extent IODF would result in a system wait state.
- The EDT specified for activation exists and is contained in the specified IODF.
- The new configuration information will fit into the current HSA.
- The device support code for all devices is present.
- The device support code for a device supports dynamic capability.
- I/O devices that you are deleting are offline to your sysplex.
- Paths that you are deleting are offline to your sysplex.
- The software activation specifies an IODF that matches the configuration definition in HSA.
- The specified IOCDS is a valid data set.
- The activation is not changing partition names or the number of partitions.
- Any new processor has at least one CHPID identified for it.
- The activation does not change a processor type or configuration mode.
- The activation does not cause a physical control unit to be added to a logical control unit if the addition causes two logical control units (with devices attached) to merge into one logical control unit.
- The activation does not cause a physical control unit to be removed from a logical control unit if the deletion causes a split of one logical control unit (with devices attached) into two logical control units.
- The activation does not change a coupling facility receiver channel path.
- The activation does not cause a loss of connectivity to an active coupling facility by deleting the last operational channel path from the coupling facility control unit.
- The activation is not deleting a pinned device or path.
- Your operating system supports the I/O definitions.
- Your server supports the channel path types and PCIe functions in your configuration.

You can run with the test function before you activate using the HCD panels or ACTIVATE command. On the HCD Activate New Configuration panels, there is a TEST Only field in which you can specify YES to test the activation and NO to when you ready to perform the activation. To use the test function with the ACTIVATE command, specify the TEST keyword. Omit the TEST keyword to actually perform the activation.

There are some checks that the test function does not perform that the actual activation does:

- The test function does not check for pinned devices because devices are only unpinned for the actual delete signal. This is more efficient. It is also possible that during a test the device would not be pinned and then attention processing causes the device to be pinned during actual activate.
- The test function also does not check SQA storage requirements for changes due to activate on the test.

Although pinned devices and paths are detected during activates with the TEST option, some products and functions such as Geographically Dispersed Parallel Sysplex (GDPS®) and z/OS Basic Hyperswap rely on signals that occur during real (non-TEST) activates in order to prevent deletion of the devices or paths. In this case the system does not issue messages to indicate if any activates with the TEST option encounter a real activate failure that can occur because of pinned devices and paths.

Devices and paths can become pinned or unpinned if a real activate request occurs at a separate time from the test activate.

If you activate hardware and software in test mode, HCD can provide information about channel paths, control units, and devices that are deleted, modified, or added. To obtain this information, you must either:

- Set the HCD profile option `SHOW_IO_CHANGES=YES` in the HCD dialog, or
- Enter the `ACTIVATE` command using the activate action in the HCD dialog.

## Recovery during dynamic configuration

---

If your system fails while making dynamic configuration changes to the hardware definition, you can recover the I/O configuration even if the system failure requires a re-IPL.

### Note:

- Although these recovery procedures describe using the `ACTIVATE` command, you can also use an HCD panel to recover from a failure that occurs during dynamic configuration changes. When HCD recommends recovery during configuration activation, a panel displays where you can specify recovery options. You can choose to try to continue with the activation or to reset the configuration to the original (source) configuration. For more information, see *z/OS HCD User's Guide*.

After a failure during a dynamic configuration change, you can recover the system to its original I/O configuration or continue making dynamic configuration changes from either the logical partition that had failed or from any other logical partition.

## Recovering original I/O configuration without system reset

If the failure does not require a system reset, and you want to recover the I/O configuration that was active before the failure occurred, follow these steps:

1. In all logical partitions, to make software-only changes, activate the source IODF.
2. In any logical partition, enter the `ACTIVATE` command with the `RECOVER` keyword and `SOURCE` option. z/OS backs out all dynamic configuration changes made prior to the failure, returning the system to its original (source) I/O hardware configuration, which is shared by all logical partitions.

## Continuing I/O configuration changes without system reset

If the failure does not require a system reset, and you want to continue making dynamic configuration changes from the point of failure, do the following:

- In any logical partition, enter the `ACTIVATE` command with the `RECOVER` keyword and `TARGET` option. z/OS continues making the remaining dynamic configuration changes, finishing building the new (target) I/O hardware configuration, which is shared by all logical partitions.

## Recovering original I/O configuration with system reset

If the failure requires a system reset, and you want to recover the I/O configuration that was active before the failure occurred, follow these steps:

1. In the logical partition that failed, specify the source IODF in the `LOADxx` member of `SYS1.PARMLIB` or `SYSn.IPLPARM`. For more information, see [“IODF processing at IPL” on page 70](#).
2. On the logical partition that failed to perform the Reset Normal action found in the Daily task list of the HMC and Support Element. For more information, see the *Support Element Operations Guide*.
3. In all logical partitions, make software-only changes, activating the source IODF.
4. In any logical partition, enter the `ACTIVATE` command with the `RECOVER` keyword and `SOURCE` option. z/OS backs out all dynamic configuration changes made prior to the failure, returning the system to its original (source) I/O hardware configuration, which is shared by all logical partitions.

## Continuing I/O configuration changes with system reset

If the failure requires a system reset, and you want to continue making dynamic configuration changes from the point of failure, follow these steps:

1. In the logical partition that failed, specify the target IODF in the LOADxx member of SYS1.PARMLIB or SYSn.IPLPARM. For more information, see the *IBM Hardware Management Console Operations Guide*.
2. Perform system reset on the logical partition that failed. For more information, see *IBM Hardware Management Console Operations Guide*.
3. In any logical partition, enter the ACTIVATE command with the RECOVER keyword and TARGET option. This continues making the remaining dynamic configuration changes, finishing building the new (target) I/O hardware configuration, which is shared by all logical partitions.

# Appendix A. Configuration and recovery scenarios

## Recovery of lost synchronization between Hardware System Area (HSA) and the active I/O configuration

When an operating system issues requests to I/O devices, the Channel Subsystem uses the Hardware System Area (HSA) with the active I/O configuration to identify I/O devices and corresponding connectivity attributes. Initially, an IBM Z processor loads HSA from an I/O configuration data set (IOCDS), saved on the hard disk of the Support Element by the Input/Output Configuration Program (IOCP). As a standalone program, IOCP might be called from the Hardware Management Console (HMC) of the processor; or, as an operating system utility program, IOCP may be called by HCD or directly via a batch job. Later, during regular system operations, HSA might be updated by the IOS component of the z/OS system using the information presented to IOS by HCD. This information comes from the production IODF, used for hardware and software configuration changes.

Each processor configuration in the production IODF has its own hardware token with a unique processor token, generated by HCD. HSA, too, contains the hardware token from the IOCDS at POR time or from the IODF as a result of a previous dynamic I/O configuration. At IPL time and when IOS is asked to change the active I/O configuration dynamically, it compares the processor token from HSA with the processor token from the corresponding processor configuration in the target IODF. IOS may accept the processor configuration from the IODF for hardware changes only, if the two processor tokens match. If the two tokens do not match, the resulting state is called “loss of synchronization between HSA and the system”. At IPL time, expect to receive message IOS505A.

It is not that uncommon for installations to experience this state. The recommended procedure of dynamic hardware and software I/O configuration requires to start from software only I/O configuration on all systems except the last active system even if the hardware token in the target IODF is different from the hardware token in HSA. As a result, all those systems enter the state of loss of synchronization. However, it is a temporary condition because synchronization will be restored when the last system successfully completes hardware and software dynamic I/O configuration, saving the new hardware token in HSA. The discussed scenario is the only one where the state of loss is acceptable because, in the end, the synchronization will be restored on the involved systems. All other occasions should not be tolerated as acceptable and installations have to recover from the state of loss as soon as possible. Recovery should not be delayed because the active I/O configuration no longer may be changed dynamically.

There is only one option for recovering synchronization between HSA and the system - to find a production IODF with the same processor token as in HSA, and either activate it in software only mode or IPL a system with the found IODF. Here is the scenario.

The system will issue the following message:

```
IOS505A DYNAMIC I/O CONFIGURATION CHANGES ARE NOT ALLOWED, THE HARDWARE
AND SOFTWARE CONFIGURATION DEFINITIONS DO NOT MATCH
```

A system programmer will use the D IOS,CONFIG system command to display the configuration:

```
IOS506I 13.40.07 I/O CONFIG DATA 957
ACTIVE IODF DATA SET = SYS4.IODFF1
CONFIGURATION ID = ISZOS1          EDT ID = 00
TOKEN:  PROCESSOR DATE      TIME      DESCRIPTION
SOURCE: CPCPROD  15-11-27 11:58:48 SYS4      IODFEC
ACTIVE CSS:  0      SUBCHANNEL SETS IN USE: 0, 1
```

The most important piece of information is on the line that is highlighted in bold. The two qualifiers, SYS4 and IODFEC, were placed into the hardware token at the time (15-11-27 11:58:48) when HCD was asked to create a new production IODF.

At the end of the Create Production IODF dialog HCD prompts a user to either accept or override two qualifiers; HCD suggests to default them to the first and second qualifier in the data set name of a new production IODF. IBM strongly recommends to accept the suggested default. Assuming it was done, SYS4.IODFEC was the last production IODF on the system that had introduced the hardware configuration, loaded in HSA either during POR, or via dynamic I/O configuration.

SYS4.IODFF1 does not contain the same processor token for processor CPCPROD. From the Command line in the HCD dialog, started with SYS4.IODFF1, a systems programmer issues the following fast path command:

```
GO PR CPCPROD
```

HCD displays the Processor List; the systems programmer issues the 'v' line command in front of the CPCPROD processor ID and checks the contents of the line "Processor token". The line contains a different token information; for example:

```
CPCPROD 15-12-05 01:14:15
```

The only chance to recover the state of synchronization between HSA and the system would be locating a production IODF - SYS4.IODFEC or another IODF - with the processor token showing up as:

```
CPCPROD 15-11-27 11:58:48
```

Now you can activate the selected IODF in software only mode. The action should restore synchronization between HSA and the system.

In this situation, an installation should be very careful because returning to an IODF with the correct processor token might create a discrepancy of a different kind - between the OS configuration in that IODF and the existing operational environment. If you consider a possibility of this outcome, a better option would be IPL of a test system in a different logical partition with the found IODF. The test system would enter the sync condition and you would use that system to activate SYS4.IODFF1 in hardware and software mode. You might expect the original production system to recover synchronization with HSA.

**Note:**

Never overwrite production IODFs that continue to be in service. While HCD tries to prevent attempts of that kind, other tools (for example IDCAMS) do not. Always keep copies of production IODFs with the I/O configuration as in HSA.

---

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