

BaanERP5.0b

Quick Guide Product Maintenance and Control

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Table of contents

1	Introduction	1-1
	Dependency check	1-1
	To find the PMC module	1-2
2	To set up PMC	2-1
	To create a VRC combination	2-6
	To create the runtime data dictionary	2-7
3	To set up a test environment for PMC	3-1
4	To import solutions	4-1

About this document

This User Guide describes how to set up the Product Maintenance and Control (PMC) module and how to import solutions. How to actually use PMC sessions is explained at a basic level only. You can find more detailed information about using PMC in the online Help for each PMC session.

This guide is intended for BaanERP administrators with thorough knowledge of BaanERP administration.

Chapter 1 introduces the PMC features.

Chapter 2 explains how to setup PMC.

Chapter 3 describes the steps you must take after the standard setup to use PMC in a test environment.

Chapter 4 explains how to import solutions with PMC.

1 Introduction

New BaanERP5.0b solutions are no longer in the .dmp format. You can no longer import solutions by using the Import Patch (ttiex1284m000) session. A new module, Product Maintenance and Control (PMC), manages the implementation of the solutions. You must use the PMC module to install the solutions. PMC is delivered to all BaanERP5.0b customers as part of the master tape or master CD-ROM that are part of Service Pack 5.

With the PMC module solutions are checked for completeness and customization interference. Previously, solutions were installed without regard to other solutions that were already installed. Technically it you could install a solution that contains an older version of a function or dll than already present on your system. In such a case the fixes that were in the original function or dll were lost.

Dependency check

The PMC module checks solutions for dependencies. Example situations are described below.

EXAMPLE To import the latest version of the Copy Sales Order (tdsls4201s000) session object, you must also have the latest version of the forms for that session.

EXAMPLE A dependency requires you to install the previous version of the solution first. Assume that you installed BaanERP from the master tape without customizations or solutions. You receive an updated version of the Copy Sales Order (tdsls4201s000) session, which contains the session object, script, and forms; which are all dependent on one another. For some reason you decide not to install the dump. A few months later you discover that a change is required in the script to correct a problem which is keeping your sales force from selling an item. The change is sent as a dump containing only the session object and script. You can install this dump only if you installed the previous because it requires the proper form from the first update solution. The PMC module warns you that the form is incorrect and that the installation will be aborted. You must install the first dump and only then will the system allows you to install the latest solution.

What if your reason for not installing a solution is important, for example, because you do not know if the existing version of the Copy Sales Order (tdsls4201s000) session was customized. The PMC module provides protection against this as well. PMC informs you that the current version is customized. There is no danger of overwriting software because PMC uses update VRC levels and keeps copies of all old software components, allowing you to easily roll back updates to any point in history.

The BaanERP5.0b Service Pack 5 release notes give some background information on PMC. Multimedia-based training on the PMC module is available on CD-ROM. Baan advises you to order and use this training program.

To find the PMC module

The PMC module is part of Baan Tools and is accompanied by online Help . The However, the Help describes some sessions that are used by Baan to create solutions; these sessions are not intended for customer use. Baan Company is the distributor of the solutions and the user or customer of the applications is the recipient. These are the sessions for customer use:

- Parameters (ttpmc0100s000)
- Initialize PMC (ttpmc0299s000)
- All sessions in the range ttpmc2000m000 through ttpmc2999m000

Other sessions mentioned in the online Help must be ignored by customers.

Follow these steps to navigate to the PMC module:

- 1 In the menu browser, expand **Tools**.
- 2 Expand **Software Installation**.
- 3 Expand **Miscellaneous**.
- 4 Expand **Product Maintenance and Control (Recipient)** . This is the recipient (the customer/user part of PMC).

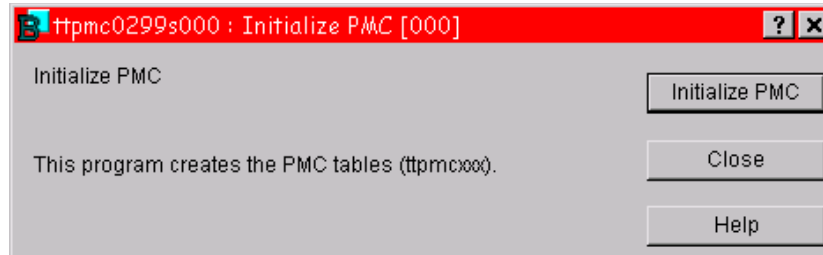
Alternatively you can follow these steps to navigate to the PMC module.

- 1 In the menu browser, expand **Tools**.
- 2 Expand **Application Development**.
- 3 Expand **Product Maintenance and Control (Recipient)**. This is the recipient (the customer/user part of PMC).

2 To set up PMC

Before you can use PMC, you must set up parameters and update VRCs. To set up PMC, take the following steps:

- 1 Run the Initialize PMC (ttpmc0299s000) session. This session sets up the ttpmc tables with your specific system information.



- 2 Click **Initialize PMC**.
- 3 Run the Parameters (ttpmc0100s000) session. Use this session to specify the paths from which the software will import solutions and where it will place the dumps that you create.

NOTE

PMC is used by both the organization that creates the solutions (called the distributor, in general this is Baan Company) and by the user or customer who wants to install the solutions (called Recipient). You play the role of recipient, therefore only the fields in the **Recipient** group box are relevant. However, for technical reasons you must also fill the fields in the **Distributor** group box.

The directory specified for **Path for Individual Solution Dumps** is not the directory where you will place a dump. This is the directory to which PMC copies the dump for its own use. You can place the dumps anywhere on your system. When you import the solution, you are prompted for the path to the original dump file. These directories must be unique. You must also enter the paths for distributor, although they are not used.

- 4 If you have completed the fields, click **Save** and click **OK**.
- 5 PMC uses base VRCs and update VRCs. The standard software is installed in the base VRC. The update VRC must be created on top of the base VRC. Service packs and individual solutions that are downloaded from the Internet are installed in this update VRC. The update VRCs must be defined and created before you can use PMC. This step describes how to create the update VRCs.

NOTE Most BaanERP5.0b users already have an update VRC available. In general, the VRC structure for standard BaanERP5.0b users looks like this:

B50_b	(base VRC)
B50U_b_stnd	(update VRC)

In general, one of the service packs is installed in the B50U_b_stnd VRC. If your VRC structure looks like this and you do not make use of customization

VRCs, you can skip this step. You can immediately continue with the next section To create a VRC combination.

If you are making use of a customization VRC, the VRC structure generally looks like this:

B50_b	(base VRC)
B50U_b_stnd	(update VRC standard)
B50_b_cust	(customization VRC)
B50U_b_cust	(update VRC for customization must be created)

In this case an update VRC for the customization (*B50U_b_cust*) must be created and in that case you must also perform this step.

To set up the relation between the current (base) VRCs and the new (update) VRCs, run the Generate Update VRC Structure (ttpmc2240s000) session.

The example dialog box below shows an installation of standard BaanERP5.0b.

The screenshot shows the 'Generate Update VRC Structure' dialog box. The title bar reads 'tpmc2240s000 : Generate Update VRC Structure [000]'. The 'Package to Determine VRC Structure' is set to 'lf'. Under 'VRC Information', 'Standard VRC' is 'B50' and 'Update customer' is 'stnd'. 'Localizations' are listed in a table with 4 rows, all empty. Below, 'VRC Combination' is 'B50Ub', 'Description' is 'Update for B50b', and 'Customization Type' is 'U'. The 'Options' section has 'Create Update VRC's' and 'Update Package Combinations' checked, and 'Change Derivation of other VRC's' also checked with 'From' and 'To' fields set to empty and 'zzzzzzzz' respectively. Buttons for 'Generate', 'Close', and 'Help' are on the right.

The example dialog box below shows an installation of Localizations for BaanERP5.0b.

The screenshot shows the same dialog box but with localization settings. 'Standard VRC' is 'B50' and 'Update customer' is 'stsy'. 'Localizations' table has row 1 with 'B50L', 'b', and 'bgl0'. 'VRC Combination' is 'B50Ub', 'Description' is 'Update for B50b', and 'Customization Type' is 'U'. The 'Options' section is identical to the previous screenshot. Buttons for 'Generate', 'Close', and 'Help' are on the right.

- 6 Complete the fields in this session.
 - You can choose any customer VRC extension for the **Update Customer** field.
 - Select the **Create Update VRCs** check box.

- The **Customization Type** field can contain any character you like, but Baan recommends U for Update. Check the online Help for illegal characters.
- You must select the **Change the Derivation of Other VRCs** check box to point to the correct upper level.
- Although selecting the **Update Package Combinations** check box is optional, Baan recommends it if you use customized VRCs (and your Package Combination does not use purely standard VRCs). This option allows the standard level to include the update VRC, protecting it from accidental modification without the PMC controls.

The example below shows a more complex BaanERP5.0b installation with a bgl0 localization and on top of that a cus0 customization.

The screenshot shows the 'Generate Update VRC Structure' dialog box. The 'Package to Determine VRC Structure' is set to 't'. Under 'VRC Information', the 'Standard VRC' is 'B50'. The 'Localizations' section shows a table with 4 rows: 1 (B50L, b, bgl0), 2 (B50C, b, cus0), 3 (empty, empty, empty), and 4 (empty, empty, empty). The 'VRC Combination' is 'B50Ub', the 'Description' is 'Update for B50b', and the 'Customization Type' is 'U'. The 'Options' section has three checked boxes: 'Create Update VRC's', 'Update Package Combinations', and 'Change Derivation of other VRC's'. The 'From' field is empty and the 'To' field is 'zzzzzzzzzz'.

The table below shows the directory structure before and after running the Generate Update VRC Structure (ttpmc2240s000) session

Before	After
B50_b	B50_b
B50L_b_bgl0	B50U_b_stsy
B50C_b_cus0	B50L_b_bgl0
	B50U_b_bgl0
	B50C_b_cus0
	B50U_b_cus0

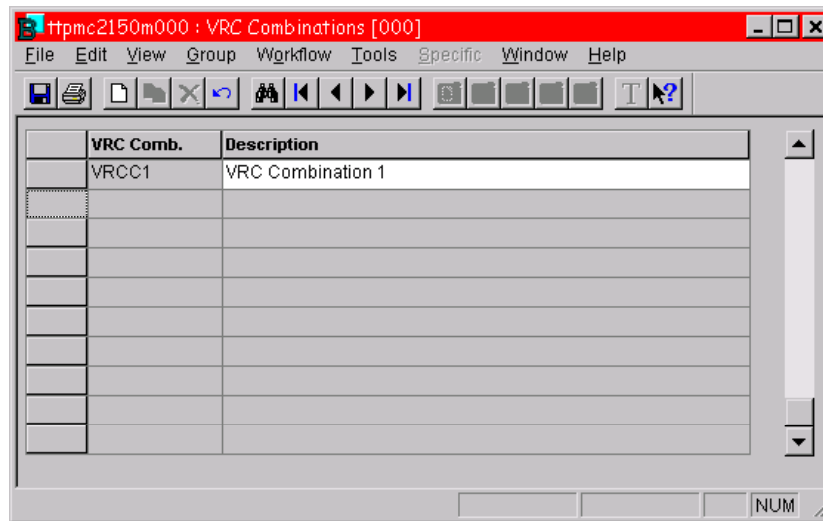
To create a VRC combination

The various update VRCs that are defined in your system are related to each other. This relation must be defined by using VRC combinations. This relation definition is required to check dependencies when you install solutions in one of the VRCs.

If you did not fill the **VRC Combination** field in the Generate Update VRC Structure (ttpmc2240s000) session, you must create a VRC combination to run a single import that places objects in all the VRCs. Otherwise you can continue with the next section To create the runtime data dictionary.

To create a VRC combination, take the following steps:

- 1 Run the Maintain VRC Combinations (ttpmc2150m000) session.
- 2 Insert one VRC combination with an appropriate name and a description.



- 3 To link the VRCs to this combination, run the Update VRCs (ttpmc2140m000) session.

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- The screenshot shows a software interface titled "ttpmc2140m000 : Update VRC's [000]". The menu bar includes File, Edit, View, Group, Workflow, Tools, Specific, Window, and Help. Below the menu is a toolbar with icons for saving, opening files, undo, redo, deleting, navigating between views, and editing text. The main area contains a table with four columns: "Update VRC", "Base VRC", "Package For Determining VRC Derivation Structure", and "VRC Combination".
- | | Update VRC | | | Base VRC | | | Package For Determining
VRC Derivation Structure | VRC Combination |
|--|------------|---|------|----------|---|--|---|-----------------|
| | B5OU ▶ | b | stdn | B5O ▶ | b | | td ▶ | VRCc1 ▶ |
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- The status bar at the bottom right has input fields containing "add", "alphanum / zoor", and some empty boxes.

In this section you create the physical update VRCs that you already defined in the previous chapters. To create the runtime data directory, take the followings steps.

- Quick Guide Product Maintenance and Control**
2-7

3 To set up a test environment for PMC

In the actions described in the previous chapter you set up PMC for your live environment. You can test the PMC solutions in a test environment before you implement them in your live environment. If you want to test, you must create the Update VRC and the VRC combination for your test environment manually.

Create the update VRC for a test environment on top of the highest VRC of your live environment. The table below contains an example of an environment in which B50_b standard and B50L_b_bgl0 extension are used.

Before you generate update VRCs for PMC	After you generate update VRCs for PMC	Update VRCs for the test environment
B50_b	B50_b	B50_b
B50L_b_bgl0	B50U_b_stnd	B50U_b_stnd
	B50L_b_bgl0	B50L_b_bgl0
	B50U_b_bgl0	B50U_b_bgl0
		B50T_b_stnd
		B50T_b_bgl0

NOTE

The update VRCs for the test environment must be created on top of B50U_b_bgl0.

In this example the character T in the VRC names indicates that this is a test environment.

To set up PMC for a test environment, take the following steps:

- 1 Run the Update VRCs (ttpmc2140m000) session and add the new B50T_b_stnd and B50T_b_bgl0 VRC as update VRCs. The base VRC for B50T_b_stnd is B50_b, and the base VRC for B50T_b_bgl0 is B50L_b_bgl0
- 2 Run the Maintain VRC Combinations (ttpmc2150m000) session and create a new VRC combination for the test update VRCs, for example, the VRC combination B50Tb.
- 3 Link the update VRCs created in step 1, to the VRC combination created in step 2.

When you run the Scan Solution File (ttpmc2200m000) session, you can first scan the test environment by entering the VRC B50T_b_stnd test update. After importing and testing, connect it to the live environment by connecting it to the B50U_b_stnd update VRC in the Connect Solutions to VRC (ttpmc2201s000) session.

You must process the solution again in the B50U_b_stnd update VRC to make the solution available for the live environment.

NOTE

The steps to create the VRCs and package combinations in Baan Tools are not described.

4 To import solutions

To import solutions, take the following steps:

- 1 Place the delivered update dump in a directory of your choice. You can, for example, use your home directory. After the initial import you can remove the files from this directory because they are copied during the import.
- 2 To run the Scan Solution File (ttpmc2200s000) session, you must have a default text group for Company 000. Check this by taking the following steps:
 - Verify whether a text group template is set up in the Default Text Groups Template (ttams1121m000) session.
 - Run the Default Text Groups by Text Field Template (ttams1120m000) session to set up the default text group.
 - To assign a default text group to your account, run the User Data (ttaad2500m000) session.
 - Double-click the specific user entry. The User Data (ttams1100s000) session starts. Click the **Defaults** tab and enter a default text group.
 - Go back to the User Data (ttaad2500m000) session and click the **Convert Changes to Run-Time DD** option on the **specific** menu. The Convert Changes to Run-Time DD (ttams2200m000) session starts.
- 3 Run the Scan Solution File (ttpmc2200s000) session. You can find it on the **Maintenance** menu under **Product Maintenance and Control (Recipient)**.

4 Enter the update VRC.

This can be any of the VRCs that you created in the Update VRCs (ttpmc2140m000) session. The reason that it can be any of these, is that the all grouping that was created is scanned for whichever other update VRCs are related to it. Any of these grouped VRCs will be accepted from the dump. You can receive multiple dumps from Baan (one for each VRC), but you can import them simultaneously since they are grouped, providing the dump files are in the same initial directory.



Select the **Print** check box to print a postupdate report.

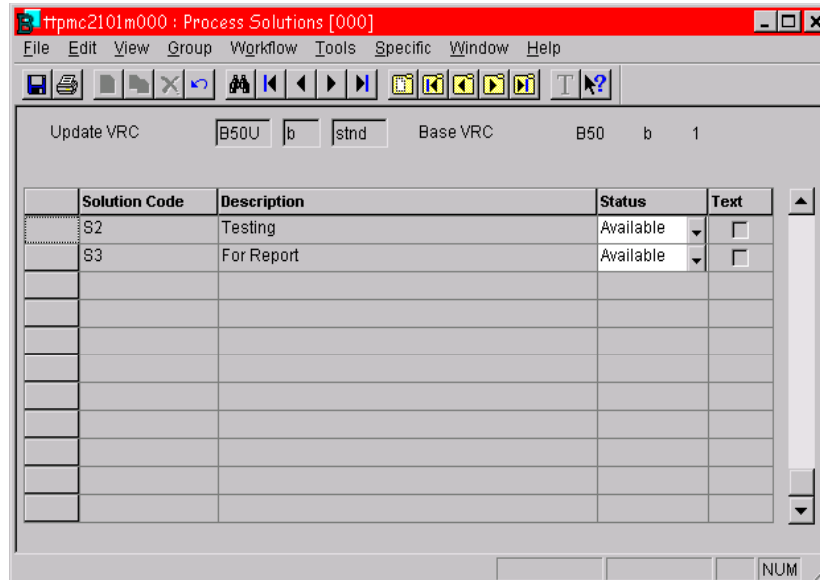
Select the **Overwrite** check box if the dump was installed previously. This allows the system to overwrite the copy in the installed directory.

Click **Ok**.

NOTE

This session does not install the dump on your system. It only verifies that the file format is correct and copies the file to the installation directory. It also stores information about the solution in the appropriate tables in Baan.

- 5 To import the solution, run the Process Solutions (ttpmc2101m000) session . This session lists all solutions on your system. Use filters to limit the number of viewed records. You can display individual solutions (as opposed to the normal bulk solutions), not-yet-installed solutions, and installed solutions. The first time you start this sessions the filter opens to define its settings, because the session may otherwise not display solution codes at all.



- 6 Select the solution you want to import. To actually install the solution, from the **Specific** menu choose **Check Solution/Patch to Install**. The customized components and any other dependencies that exist are now examined.
- 7 Complete the dialog box as shown below and click **OK**.



- 8 To find out which components are in the dump, select **Components** from the **Specific** menu. Similarly, the **Dependencies** menu option shows all dump dependencies.
- 9 Choose **Install** from the **Specific** menu. When the installation process has been completed, you can run the new software.

