Connect:Direct® for i5/OS

Upgrading Guide

Version 3.6

Connect:Direct for i5/OS Upgrading Guide
Version 3.6
Second Edition

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Contents

Upgrading Connect:Direct for i5/OS

This document covers the information you need when upgrading from a previous version of Connect:Direct for i5/OS using the same administrator profile and installation library.

> **Note:** You cannot upgrade from a version prior to version 3.5.00. If you wish to migrate from an earlier version to version 3.6.00, you must follow the instructions for first-time installations in the *Connect:Direct for i5/OS Installation and Administration Guide*.

Read *Before You Begin* in its entirety and follow those instructions prior to the upgrade.

> **Note:** If you are planning to run two different versions of Connect:Direct for i5/OS simultaneously, you must use a different administrator user profile to install the new version of Connect:Direct for i5/OS. You cannot use the administrator profile used to install the earlier version of the product. Do not use QSECOFR as the Administrator profile during installation.

Upgrade Worksheet

Use the following worksheet when you upgrade Connect:Direct for i5/OS *Upgrade Worksheet* .

Upgrade Worksheet

Connect:Direct administrator profile name: <u>cdadmin</u>

Production Library where you will install Connect:Direct: _____ (8 characters)

CD Reader for the installation:_____

Name for the Connect:Direct subsystem:_____

    (10 characters - This name can match the production library name.)

Do you want to convert an existing Connect:Direct i5/OS 3.5.00 Netmap: *YES or *NO

    Name of Temporary Location (library) existing file will be copied to: _____

Do you want to convert an existing Connect:Direct i5/OS 3.5.00 User File: *YES or *NO

    Name of Temporary Location (library) existing file will be copied to: _____

Do you want to upgrade Secure+ Option: *YES or *NO

    Name of Temporary Location (library) existing files will be copied to: _____

Do you have customized Extended Translation Tables?

    Name of Temporary Location (library) existing tables will be copied to: _____

Do you want the install process to create translation tables: *YES or *NO

Type of printer device file to be created: _____

    Type: *SCS or *IPDS

Define necessary initialization parameters. *Modifying Initialization Parameters* in the *Connect:Direct for i5/OS Installation and Administration Guide*, contains a list of these parameters along with detailed information.

    Name for your local Connect:Direct node: _____

    (This name can match the library name or subsystem name.)

    Enable TCP/IP up to four Listeners: *YES or *NO.

    If *YES, this node's TCP/IP address: _____   Port Number _____

        TCP/IP address: _____   Port Number _____

        TCP/IP address: _____   Port Number _____

        TCP/IP address: _____   Port Number _____

License Management Key File Information

> **Note:** Both temporary and permanent license management key files are sent through E-mail. See *Connect:Direct for i5/OS Release Notes* for more information on the license management key file. Also, see *Preparing to Install Connect:Direct* in the *Connect:Direct for i5/OS Installation and Administration Guide* for instructions on how to check options in the license management key file.

    N-Concurrent-Sessions: _____

    Will you be reusing the existing License Management Key file: *YES or *NO

     Name of Temporary Location (library) existing file will be copied to: _____

Before You Begin

Before beginning the upgrade, complete the following steps:

1. Complete the *Upgrade Worksheet* on page 6.

2. To convert the network map and user authorization files from an earlier version of Connect:Direct for i5/OS, copy the CDNTMP file, CDUSER file, and any custom translation files to another i5/OS library. On the *Upgrade Worksheet*, record the temporary location (library) to which you will be copying the files. Do not use QTEMP.

3. To upgrade Secure+ Option, copy the Secure+ Option files, SPACC and SPNTMP, to another i5/OS library. On the *Upgrade Worksheet*, record the temporary location (library) to which you will be copying them. Do not use QTEMP.

4. To reuse the existing license management key file, copy it to another i5/OS library. On the *Upgrade Worksheet*, record the temporary location (library) to which you will be copying the file. Do not use QTEMP.

5. To retain any existing customized Extended Translation tables, copy those files to another i5/OS library. On the *Upgrade Worksheet*, record the temporary location (library) to which you will be copying the files. Do not use QTEMP.

6. Create a backup of the Connect:Direct for i5/OS library and administrator user profile to a Save File (*SAVF).

7. If you use SNA, take a screen print of the communications entries of your Connect:Direct for i5/OS subsystem description. (To access the Display Communications Entries screen, type **DSPSBSD** *Subsystem Name* and press **Enter**, and then select Option 8, Communications Entries, on the Display Subsystem Description menu.)

8. Take screen prints of all Change Connect:Direct Parameters (CHGCDPARM) screens to capture information about your current initialization parameters.

9. Clear and delete the Connect:Direct for i5/OS library and administrator user profile from your system.

10. Create a dedicated user profile as the Connect:Direct for i5/OS administrator using the following parameters.

```
CRTUSRPRF USERPRF (cdamin) SPCAUT(*ALLOBJ *SAVSYS *SPLCTL *SECADM *JOBCTL
*SERVICE *IOSYSCFG) PWDEXPITV(*NOMAX) LMTDEVSSN(*NO)
```

where *cdamin* is the name you chose for your administrator.

Note: Do not user QSECOFR as the installing administrator user profile.

Installing from the SAVF File

Once you upload the SAVF file to your i5/OS server, complete the following steps to install Connect:Direct for i5/OS.

1. Sign on to the i5/OS server as cdadmin using the password you set.

2. Use the DSPLIBL command to ensure the following:

    ❖ QTEMP and QGPL are in your library list.

    ❖ CURLIB is set to *CRTDFT. (No current library)

    ❖ Your list does not include any previously installed Connect:Direct libraries.

Note: You must use a new library for installation.

3. To restore the object files, type the following command and press Enter.

    ```
    RSTOBJ OBJ(CDINSTSAVF) SAVLIB(CDBAS36) DEV(*SAVF) SAVF(CD3600SAVF) RSTLIB(QTEMP)
    ```

4. To start the installation, type the following command and press F4 to display the prompt for the installation parameters:

    ```
    CDINSTSAVF
    ```

5. Follow the instructions on the command for save file and install library. When you are prompted, type the following values in the Connect:Direct Install screen and press Enter.

Field	Value	Description
Install from Device	*SAVF	Specifies the name of the device to be used for installation (in this case a file name).
Save file name	CD3600SAVF	Specifies the name of the save file.
Library	*LIBL	Specifies the name of the save file library *LIBL.
Install to library	cdlib	Specifies the name of the library where you want to install the product.

6. The Create Connect:Direct Objects screen (CRTCDOBJ) is displayed, as shown in *Installing Connect:Direct* of the *Connect:Direct for i5/OS Installation and Administration Guide*.

7. To generate the rest of the components, go to *step 7 on page 11*.

Upgrade Connect:Direct for i5/OS from the Distribution Media

To upgrade to Connect:Direct for i5/OS from the distribution media:

1. Mount the Connect:Direct for i5/OS CD-ROM.

2. Sign on to the i5/OS system as the designated Connect:Direct for i5/OS Administrator.

3. Use the DSPLIBL command to ensure the following:

   ◆ QTEMP and QGPL are in your library list.

   ◆ CURLIB is set to *CRTDFT. (No current library)

   ◆ Your list does not include any previously installed Connect:Direct libraries.

   > **Note:** You must use a new library for installation. If the Connect:Direct library has been added to the System Library List, you must remove it before you install Connect:Direct for i5/OS, which will require you to IPL the system.

4. To load the installation objects from the CD and start the upgrade, type the following command and press **Enter**:

```
LODRUN DEV(device id)
```

where device id is the name of your optical drive, for example, OPT01.

The following is an example of the **Load and Run** screen:

```
                      Load and Run (LODRUN)

 Type choices, press Enter.

 Device  . . . . . . . . . . . . .   _____      Name, *TAP, *OKT, *OPT












                                                                  Bottom
   F3=Exit   F4=Prompt   F5=Refresh   F12=Cancel   F13=How to use this display
   F24=More keys
```

5. To start the installation, type **CDINSTALL** and press **Enter**.

```
                     Connect:Direct Install (CDINSTALL)

   Type choices, press Enter.

   Install from Device  . . . . . .   Filled in      NAME
   Install to library . . . . . . .   _____       NAME
   Character set  . . . . . . . . .   *MIXED         *UPPER, *MIXED
```
```
                                                                   Bottom
   F3=Exit   F4=Prompt   F5=Refresh   F12=Cancel   F13=How to use this display
   F24=More keys
```

6. Type the information for each field using the following table for reference, and press **Enter**
    when you are finished.

Field	Description
Install from Device	Specifies the name of the device to be used for installation. The installation procedure extracts the value for this field automatically from the Load and Run screen so you cannot type anything into this field.
Install to library	Specifies the name of the library where you want to install the product. This is your Connect:Direct for i5/OS production library (if necessary, refer to your Change C:D parms (CHGCDPARM) screen print).
Character Set	Specifies to install either a mixed case or all upper-case version of Connect:Direct for i5/OS for systems that use DBCS character sets. The values are: MIXED–Install the mixed-case version of Connect:Direct for i5/OS. UPPER–Install the upper-case version of Connect:Direct for i5/OS.

7. To generate the rest of the components required by Connect:Direct, type the required
    information as it applies to your system in the Create Connect:Direct Objects (CRTCDOBJ)
    screen and press **Enter**. Use the following table for reference.

```
                        Create Connect:Direct Objects (CRTCDOBJ)

     Type choices, press Enter.

     Local Library Name . . . . . . .   _____         Character value
     Subsystem Name . . . . . . . . .   _____         Name
     Local Node Name  . . . . . . . .   _____
     Convert Old C:D Netmap file  . .   *NO             *YES, *NO
     Convert Old C:D User File  . . .   *NO             *YES, *NO
     Copy Secure+ Files . . . . .       *NO             *YES, *NO
     Build XTRAN tables . . . . . . .   *NO             *YES, *NO




                                                                         Bottom
     F3=Exit   F4=Prompt   F5=Refresh   F12=Cancel   F13=How to use this display
     F24=More keys
```

Field	Description
Local Library Name	Specifies the name of the Connect:Direct production library. Use the same name that you used in the Install to library field on the Connect:Direct Install (CDINSTALL) screen.
Subsystem Name	Specifies the name of the Connect:Direct subsystem. The subsystem cannot be named CDJOBD. SBSD can be 10 characters long. By default, this name should be the same as the production library name. You can change the subsystem name.
	Note: A test version of Connect:Direct for i5/OS cannot run concurrently from the same subsystem as the production Connect:Direct for i5/OS.
Local Node Name	Specifies the name of the local Connect:Direct node used for communicating with remote nodes. The Local Node Name (PNODE) cannot exceed 16 characters and is case-sensitive.
Convert Old C:D Netmap File	Specifies whether CRTCDOBJ should convert the Connect:Direct i5/OS version 3.5 network map to version 3.6. If you have version 3.5 of Connect:Direct i5/OS, type *YES.
Convert Old C:D User File	Specifies whether CRTCDOBJ should convert the connect:Direct i5/OS version 3.5 version user file to version 3.6. If you have version 3.5 of Connect:Direct i5/OS, type *YES.
Copy Secure+ Files	Specifies whether CRTCDOBJ should copy the Secure+ Option files to use with Connect:Direct for i5/OS version 3.6. If you have Secure+ Option, type *YES.

Field	Description
Build XTRAN tables	Specifies whether CRTCDOBJ should build the Connect:Direct for i5/OS version 3.6 extended translation tables. This option is primarily for those systems requiring Double-byte Character Set (DBCS) support. To build your tables after installation, type *YES. After the entire installation is complete, refer to *Maintaining Extended Translation* in the *Connect:Direct for i5/OS Installation and Administration Guide*. **Note**: If you are not using extended translation tables, you can delete the cdlib/CDXTSOURCE file after the installation is complete.

You may receive the message *Object already exists* in the following circumstances:

◆ If you tried to install Connect:Direct previously but aborted the installation.

◆ If you received an abnormal termination and then attempted to install again.

This message gives you the opportunity to either cancel, ignore, or proceed.

8. When the Create Printer File (CRTPRTF) screen is displayed, press **Enter** to accept the default values and continue the upgrade.

```
                         Create Printer File (CRTPRTF)

  Type choices, press Enter.

  File . . . . . . . . . . . . . .                   Name
    Library  . . . . . . . . . . .     *CURLIB       Name, *CURLIB
  Source file  . . . . . . . . . .   *NONE           Name, *NONE
    Library  . . . . . . . . . . .                   Name, *LIBL, *CURLIB
  Source member  . . . . . . . . .   *FILE           Name, *FILE
  Generation severity level  . . .   20              0-30
  Flagging severity level  . . . .   0               0-30
  Device:
    Printer  . . . . . . . . . . .   *JOB            Name, *JOB, *SYSVAL
  Printer device type  . . . . . .   *SCS            *SCS, *IPDS, *LINE...
  Text 'description' . . . . . . .   *SRCMBRTXT



                                                                       Bottom
    F3=Exit   F4=Prompt   F5=Refresh   F10=Additional parameters   F12=Cancel
    F13=How to use this display       F24=More keys
```

9. When the Convert Old User File (CPYCDUSRF) screen is displayed, type the name of the library where you copied the user authorization file in the **Temporary Location** field and

press **Enter**. Refer to your *Upgrade Worksheet*, if necessary. The **C:D Production Library** field is already filled in and cannot be changed.

```
                     Convert Old User File (CPYCDUSRF)

  Type choices, press Enter.

  Temporary Location (Library)  . . . .           Name
  C:D Production Library . . .  . . . .           Filled in








                                                                      Bottom
   F3=Exit    F4=Prompt   F5=Refresh   F12=Cancel   F13=How to use this display
   F24=More keys
```

Note: If you receive warning messages after CRTCDOBJ is executed, go to step 1 on page 18 for further instructions.

10. When the first Change C:D parms (CHGCDPARM) screen is displayed, verify the initialization parameters by reviewing the information on it. Refer to the screen prints you created earlier.

> **Note:** All parameters on the Change C:D parms (CHGCDPARM) screens, including all parameters new to release 3.6, are described in detail in *Modifying Initialization Parameters* in the *Connect:Direct for i5/OS Installation and Administration Guide.*

```
                      Change C:D parms (CHGCDPARM)

  Type choices, press Enter.

  Production Library Name  . . . . > CDDV3600     Character value
  Connect:Direct subsystem name  .   CDDV3600     Character value
  Local Node Name  . . . . . . . .   'CDDV3600'
  Default local location . . . . .   *NETATR      Character value
  User to receive Messages . . . .   CDDV3600     Character value
  Process queue startup option . .   *COLD        *WARM, *COLD
  Enable TCP/IP listener . . . . .   *YES         *NO, *YES
  TCP CRC  . . . . . . . . . . . .   *ON          *ON, *OFF
  TCP CRC Override . . . . . . . .   *YES         *YES, *NO
  TCP/IP host address  . . . . . .   'FRAN'

  TCP/IP host port . . . . . . . .   '01364'      00001-65535, '',
   Alternate TCP/IP Host Address

   Alternate TCP/IP Host Port  . .                00001-65535, '',

                                                               More...
  F3=Exit   F4=Prompt   F5=Refresh   F12=Cancel   F13=How to use this display
  F24=More keys
```

> **Note:** To run the TCP/IP listener job when you start up Connect:Direct for i5/OS, be sure that ***YES** is specified for the **Enable TCP/IP listener** field and then enter the information for your system in the **TCP/IP host address** and **TCP/IP host port** fields.   Optionally you may enter the **Alternate TCP/IP Host Address** and **Alternate TCP/IP Host Port** fields. You may specify up to four TCPHOST/TCP PORT combinations for the server to listen on for incoming remote node connections. To listen on all interfaces, enter **0.0.0.0** in **TCP/IP host address**.

a. Press **Page Down** to access the second screen and display additional parameters. An example follows.

> **Note:** If you have a usage license, use the value of *N CONCURRENT-SESSIONS* in the license management key file for the fields **Maximum primary sessions**, **Maximum secondary sessions**, and **Maximum synchronous sessions**. See *Preparing to Install Connect:Direct* in the *Connect:Direct for i5/OS Installation and Administration Guide* for more information about how to check options in the license management key file.

```
                        Change C:D parms (CHGCDPARM)

   Type choices, press Enter.

    Alternate TCP/IP Host Address

    Alternate TCP/IP Host Port  . .              00001-65535, '',
    Alternate TCP/IP Host Address

    Alternate TCP/IP Host Port  . .              00001-65535, '',
   TCP SRC Ports . . . . . . . . .

   TCP SRC Port Listen Iterations    03           01-255
   Netmap Check . . . . . . . . . .  *YES         *NO, *YES
   Node Check . . . . . . . . . . .  *NAME        *NAME, *ADDRESS, *BOTH
   Enable spool monitor . . . . . .  *NO          *NO, *YES
   Permanent session managers . . .  00           00-20, *NOMAX
   Maximum primary sessions . . . .  2            00-99, *NOMAX
   Maximum secondary sessions . . .  2            00-99, *NOMAX
   Maximum synchronous sessions . .  2            00-99, *NOMAX
                                                                     More...
   F3=Exit   F4=Prompt   F5=Refresh   F12=Cancel   F13=How to use this display
   F24=More keys
```

b. Press **Page Down** to access the third screen and display additional parameters. An example follows.

```
                        Change C:D parms (CHGCDPARM)

   Type choices, press Enter.

   Trace Instructions . . . . . . .  *NONE
   Job Default Priority . . . . . .  07           00-15
   Checkpoint Interval  . . . . . .  0            0..2000M
   Checkpoint Days  . . . . . . . .  03           01-99
   Wait between Retries . . . . . .  000300       Time
   Maximum Retry Attempts . . . . .  002          000-512
   Maximum records in stat member    0000010000   *NOMAX 1000..2147483643
   Maximum members in stat file . .  00010        *NOMAX 2..32767
   Full stat file action  . . . . .  *ARCHIVE     *ARCHIVE, *DELETE
   Extended compression level . . .  1            01-09
   Extended compression window  . .  13           08-15
   Extended compression memory  . .  4            01-9
   Print CDLOG spool files  . . . .  *YES         *NO, *YES
   TCP Max Time to Wait . . . . . .  00180        *NOMAX 0..03600
   RUNTASK Max Time to Wait . . . .  21600        *NOMAX 0..21600


                                                                     More...
   F3=Exit   F4=Prompt   F5=Refresh   F12=Cancel   F13=How to use this display
   F24=More keys
```

c. Press **Page Down** to access the fourth screen and display the remaining parameters. An example follows.

```
                          Change C:D parms (CHGCDPARM)

   Type choices, press Enter.

   Asset protection key file  . . . >  'cdlib/APKEYF(APKEYF)'

















                                                                       Bottom
    F3=Exit    F4=Prompt    F5=Refresh    F12=Cancel    F13=How to use this display
    F24=More keys
```

d. Type the location and name of the **Asset protection key file** (also known as the license management key file) enclosed in single quotes. Refer to your *Upgrade Worksheet*, if necessary.

e. When you have verified or modified all the initialization parameters, press **Enter**.

11. When the Convert Old Netmap File (CNVNTMPF) screen is displayed, type the name of the library where you copied the network map file in the **Temporary Location** field and press **Enter**. Refer to your *Upgrade Worksheet*, if necessary. All other fields are already filled in and cannot be changed.

```
                        Convert Old Netmap File (CNVNTMPF)

   Type choices, press Enter.

   Temporary Location (Library)  . . . . .  _____         Name
   C:D Production Library. . . . . . . . .  Filled in
   C:D New Release Subsystem . . . . . . .  Filled in
   Connect:Direct Administrator  . . . . .  Filled in







    F3=Exit    F4=Prompt    F5=Refresh    F12=Cancel    F13=How to use this display
    F24=More keys
```

12. Regardless of whether you have Secure+ Option installed, Connect:Direct for i5/OS creates a local node record and displays the Secure+ Admin Main Screen.

```
                        SECURE+ ADMIN MAIN SCREEN                    FRAN
                                                        06/03/04  11:13:22
    Position to node . . .

    Type option and press Enter.
      2=Change    4=Delete    5=Display    6=Add Alias Node

      Node-Name        Typ  S+  STS  SSL  TLS  Ovr  Encryption  Sig  Lmt  Upd
      *LCLNODE         L    N   Y    N    N    Y    IDEACBC128  N         N
      FRAN.CDTS3500    R    *   Y    N    N    *    *           *         *










                                                                    Bottom

    F1=Help    F3=Exit    F5=Refresh    F6=Add NEW entry    F7=Sync-Add    F8=Sync-Del
    F12=Previous          F13=ReKey Secure
```

If you do not have Secure+ Option installed, press **F3** to exit. When the build process is complete, you receive a message that the process was successful. Continue with step 1 on page 18.

If you do have Secure+ Option installed, press **F3** to continue the installation, and continue with the next step.

13. When the Upgrade Connect:Direct Secure+ (SPUPGRADE) screen is displayed, type the name of the library where you copied the Secure+ Option files in the **Temporary Location**

field, and press **Enter**. Refer to your *Upgrade Worksheet*, if necessary. The **C:D Production Library** field is already filled in and cannot be changed.

```
                     Upgrade Connect:Direct Secure+ (SPUPGRADE)

  Type choices, press Enter.

 Temporary Location (Library)  . . . .          Name
 C:D Production Library . . .  . . . .          Filled in












                                                                          Bottom
    F3=Exit    F4=Prompt    F5=Refresh    F12=Cancel    F13=How to use this display
    F24=More keys
    Parameter FROMLIB required.                                              +
```

When the build process is complete, you receive a message that the process was successful.

To configure Secure+ Option, refer to the *Connect:Direct Secure+ Option for i5/OS Implementation Guide* for more information.

Verify and Complete the Upgrade

To verify and complete the upgrade:

1. Type **DSPJOBLOG** at the command line and press **F10** for detailed messages to view the job log.

2. Log off and log back on as the Connect:Direct for i5/OS Administrator.

3. To verify certain netmap parameter values, access the Work with CD Netmap screen (WRKCDNTMP). For each node, verify that the Transmission Buffer Size value is a five-digit number (no greater than 65535) and that the Pacing Count value is 000000.

4. If you use SNA, re-enter the communications entries of your Connect:Direct for i5/OS subsystem. See *Performing Administrative Duties* in the *Connect:Direct for i5/OS Installation and Administration Guide* for instructions on how to use the Add Communications Entry (ADDCMNE) commands.

5. To add network map entries to reflect your remote nodes, use the WRKCDNTMP (Work with Connect:Direct Netmap) command. See *Maintaining the Network Map* in the *Connect:Direct for i5/OS Installation and Administration Guide.*

6. Verify that you have installed the latest maintenance by accessing the Sterling Commerce Customer Support Web site at www.sterlingcommerce.com. For more information about accessing the Customer Support Web site, see the *Connect:Direct for i5/OS Release Notes*.