

Sterling Field Sales

Upgrade Guide

Release 9.1



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This edition applies to the 9.1 Version of IBM® Sterling Field Sales and to all subsequent releases and modifications until otherwise indicated in new editions.

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Introduction

This guide explains how to upgrade to the latest release of IBM® Sterling Field Sales, which is Release 9.1. The following table provides the upgrade paths available from the earlier releases of Sterling Field Sales to Sterling Field Sales, Release 9.1.

From		To		Path Followed	
Sterling Selling and Fulfillment Foundation Version	Sterling Field Sales Version	Sterling Selling and Fulfillment Foundation Version	Sterling Field Sales Version	Sterling Selling and Fulfillment Foundation Version	Sterling Field Sales Version
9.0	9.0	9.1	9.1	9.0 > 9.1	9.0 > 9.1

Task List

When upgrading to Sterling Field Sales, Release 9.1, carry out the tasks in sequence as listed in the following table:

Task	Refer to
Perform Migration Assessment	<ul style="list-style-type: none">◆ System Requirements◆ Important Behavior Changes Between Release 9.0 and Release 9.1
Upgrade to Sterling Field Sales, Release 9.1	<ul style="list-style-type: none">◆ Run the Upgrade Using NFS Mounting◆ Upgrading to Sterling Selling and Fulfillment Foundation, Release 9.1◆ Installing Sterling Field Sales, Release 9.1◆ Pre-Migration Activities◆ Upgrade to Application Add-In, Release 9.1◆ Factory Setup Data Migration
Post-Migration	<ul style="list-style-type: none">◆ Analyzing Sterling Field Sales User Interface Upgrade◆ Post-Migration Activities

System Requirements

The system requirements for upgrading to Sterling Field Sales, Release 9.1, are the same as that for upgrading to Sterling Selling and Fulfillment Foundation, Release 9.1. For more information about the system requirements, see the *Sterling Selling and Fulfillment Foundation: System Requirements Guide*.

Important Behavior Changes Between Release 9.0 and Release 9.1

This topic describes the important behavior changes in Sterling Field Sales between Release 9.0 and Release 9.1. This topic describes only those changes that have an impact on the application because of the migration. For more information about all the new features introduced in Sterling Field Sales, Release 9.1, refer to the *Sterling Field Sales: Release Notes*.

Validating a Quote

In Release 9.1, the `validateItemsForOrdering` API is no longer called to validate the items in a quote when a user navigates to the **Products** tab or clicks **Save** in the Quote Details screen. The items in a quote are validated when a user performs any of the following tasks:

- Requests approval of the quote
- Presents the quote to a customer
- Converts the quote to an order

Additionally, in Release 9.1, in the **Products** tab of the Quote Details screen, the **Problem Lines** radio button has been removed from the panel that is displayed when a user clicks the **Show Filter Options** hyperlink. A new **Validate Quote** related task has been added to enable a user to view the lines failing validation, if any, in the quote.

How it Affects You

In Release 9.1, the `validateItemsForOrdering` API is not called to validate the items in a quote when a user navigates to the **Products** tab or clicks **Save** in the Quote Details screen. Additionally, a user cannot filter the items in a quote to view the lines failing validation. To view the lines failing validation, a user can click the **Validate Quote** related task. For more information about validating a quote, refer to the *Sterling Field Sales: User Guide*.

Migration Strategy

None.

Modifications to Notes Dialog Box

In Release 9.1, the following changes have been made to the **Notes** dialog box:

- A new check box, **Mark priority as high**, has been added.
- The **Filter By** and **Include** panels have been removed.
- The **Filter by Note Type** drop-down list and **Show System Generated Notes** check box are displayed under a new **Filter Options** panel. The **Filter Options** panel is collapsible and by default, is in a collapsed view.
- By default, all the notes added for the abandon quote, present quote to customer, accept quote, rework quote, and reject quote tasks are automatically marked as high priority notes.

- All the notes that are marked as For internal use only are displayed with the prefix INTERNAL USE ONLY and in red.
- Notes of high priority are displayed with a red border.
- Each note added to a quote is displayed in a collapsible panel, and the panel header displays the following information:
 - User name of the user who added the note.
 - Date and time when the note was added.
 - The note type associated with the note that has been added. This is not displayed if the note is not associated with a note type.
- The **Add Note** title has been added to the panel that contains the **Note Text** field, **Note Type** drop-down list, and the **For internal use only** check box.
- The location of the **Add Note** button is moved within the **Add Note** panel.

How it Affects You

If you have customized the **Notes** dialog box, ensure that your customizations are retained after the migration.

Migration Strategy

None.

Run the Upgrade Using NFS Mounting

It is recommended that you run the upgrade from the database server instead of the application server to avoid significant network overhead. Therefore, to avoid installing the complete Sterling Selling and Fulfillment Foundation on the database server, use NFS mounting.

To use NFS mounting:

1. Create a user on the database server with the user identification (UID), and group identification (GID) as the user who installed the Sterling Selling and Fulfillment Foundation on your application server. It is preferred that this user also has the same user name. For example, if the UNIX user 'Sterlite' is used for installing and running Sterling Selling and Fulfillment Foundation, Release 9.1, with a UID of 5001 and ID of 101, the user that you create on the database server must have a UID of 5001 and GID of 101, and preferably is named 'Sterlite'.
2. Share the <INSTALL_DIR> directory on the application server.
3. Mount the <INSTALL_DIR> directory with the same path on the database server. For example, if your <INSTALL_DIR> is /apps/Sterling on the application server, mount it as /apps/Sterling on the database server.
4. Share the <JAVA_HOME> directory that you are using for the Sterling Selling and Fulfillment Foundation from the application server as you might have multiple Java versions installed on the application server for various reasons.
5. Mount the <JAVA_HOME> directory with the same path on the database server. For example, if your <JAVA_HOME> is /apps/java on the application server, you must mount it as /apps/java on the database server.

Note: Ensure that you only perform NFS mount for <INSTALL_DIR> and <JAVA_HOME> directories. Do not perform NFS mount for database files. It is recommended that you do not perform NFS mount for write-intensive applications, as it drastically impacts the database performance.

6. Log in as the Sterling Selling and Fulfillment Foundation administrator on the database server.

Upgrading to Sterling Selling and Fulfillment Foundation, Release 9.1

Before upgrading to Sterling Field Sales, Release 9.1, ensure that you have upgraded to the Sterling Selling and Fulfillment Foundation, Release 9.1, and installed the latest hotfix. When you upgrade to the Sterling Selling and Fulfillment Foundation, Release 9.1, the following tasks are performed that impact Sterling Field Sales:

- Alters the schema
- Copies the current customizations

For more information about upgrading to Sterling Selling and Fulfillment Foundation, Release 9.1, refer to the *Sterling Selling and Fulfillment Foundation: Upgrade Guide*.

Installing Sterling Field Sales, Release 9.1

Before proceeding with the upgrade, ensure that you have completed the following tasks:

- Modify the values of the following properties in the `sandbox.cfg` file located in the `<INSTALL_DIR>/properties` directory as follows:
 - `REINIT_DB=false`
 - `LOAD_FACTORY_SETUP=false`
 - `NO_DBVERIFY=true`
- Rerun `setupfiles.sh` from the `<INSTALL_DIR>/bin` directory.
If the properties are already set, skip this task.
- Install Sterling Field Sales, Release 9.1.
For more information about installing Sterling Field Sales, Release 9.1, refer to the *Sterling Selling and Fulfillment Suite: Applications Installation Guide*.

Pre-Migration Activities

Before upgrading Sterling Field Sales, ensure that you set the following environment variables appropriately:

- JAVA_HOME
- ANT_HOME
- ANT_OPTS

For more information about setting the environment variables, see the *Sterling Selling and Fulfillment Foundation: Installation Guide*.

Allocating Memory in sfsmigration.properties

During the upgrade process, Sterling Field Sales allows you to pass JVM-specific JAVA and ANT arguments in the

<INSTALL_DIR>/COM/Migration/9.0/COM_Add-in/ycdmigration.properties and <INSTALL_DIR>/Migration/9.0/sfs/sfsmigration.properties files to avoid out-of-memory errors. You can pass the following arguments:

- mem_java_args_sun=-Xms128m -Xmx1408m -XX:MaxPermSize=512m
- mem_java_args_non_sun=-Xms128m -Xmx1408m
- mem_ant_args_sun=-Xms128m -Xmx1408m -XX:MaxPermSize=512m
- mem_ant_args_non_sun=-Xms128m -Xmx1408m

Upgrade to Application Add-In, Release 9.1

Application Add-in consists of APIs, Services, Entities, Agents, and so on, which are common to Sterling Field Sales, Sterling Call Center, Sterling Store, and Sterling Web. When upgrading to Sterling Field Sales, Release 9.1, you must first upgrade the Application Add-in components. The following sections describe the tasks that have to be performed to upgrade the Application Add-in.

Notes:

- ⌚ If you have upgraded S Sterling Call Center, Sterling Store, or Sterling Web, do not perform the Application Add-in upgrade since the Application Add-in upgrade will already be performed as part of the S Sterling Call Center, Sterling Store, or Sterling Web upgrade.
- ⌚ Between the time that you run the upgrade-history-tables and the upgrade-transaction-tables tasks, DO NOT purge or restore any data.

History Data Migration

To migrate the history data when upgrading from Release 9.0 to Release 9.1, run the following command from the <INSTALL_DIR>/COM/Migration/9.0/COM_Add-in directory:

```
{ANT_HOME}/bin/ant -f ycdmigration.xml -Druntime=<INSTALL_DIR>  
-Druntime.old=<INSTALL_DIR_OLD> -DapplySOM=false  
-Dtarget=upgrade-history-tables migrate -logfile <logfile>
```

- The actual data migration of all history data present in the history tables is done. All new indexes required for performance are added. After migration of history data, history tables will have new columns and data.
- This command has 3 inner tasks which are performed. They are:
 - ⌚ pre-history-migration
 - ⌚ migrate-history-data
 - ⌚ post-history-migration
- The *.done files created in the status folder for the upgrade-history-tables task are:
 - ⌚ history_ant_migration.xml.done
 - ⌚ history_ant_premigration.xml.done
 - ⌚ history_ant_postmigration.xml.done

Transaction Data Migration

To migrate the transaction data from Release 9.0 to 9.1, run the following command from the <INSTALL_DIR>/COM/Migration/9.0/COM_Add-in directory:

```
{ANT_HOME}/bin/ant -f ycdmigration.xml -Druntime=<INSTALL_DIR>  
-Druntime.old=<INSTALL_DIR_OLD> -DapplySOM=false  
-Dtarget=upgrade-transaction-tables migrate -logfile <logfile>
```

- The actual data migration of all transaction data present in the transaction tables is done. All new indexes required for performance are added. After migration of transaction data, transaction tables will have new columns and data.
- This command has 4 inner tasks which are performed. They are:
 - pre-transaction-migration
 - migrate-transaction-data
 - post-transaction-migration
 - apply-fc-setup for COM_Add-in
- The `transaction_Add-in_ant_applycomfcsetup.xml.done` file is created in the `status` folder for the `upgrade-transaction-tables` task.

After the tasks are completed, search for all the `*.restart` files under the `9.0/COM_Add-in/database/FactorySetup/ycd` directory.

For the upgrade tasks to be successfully completed, ensure that the value of the `Completed` attribute is set to "Y" for all the tasks.

- If the value of the `Completed` attribute is set to "N" for any of the tasks, do not proceed with the upgrade. Contact Sterling Selling and Fulfillment Foundation Technical Support for assistance.
- **Note:** The transaction data migration is not performed in the activator mode. Therefore, the event handlers and pipeline conditions are not overridden.
- If you want to clear or remove all `*.restart` and `*.done` files before restarting the transaction data migration, run the following command:

```
${ANT_HOME}/bin/ant -f ycdmigration.xml -Druntime=<INSTALL_DIR>
-Druntime.old=<INSTALL_DIR_OLD> -Dtarget=clean-up-for-rerun migrate
-logfile <logfile>
```

Factory Setup Data Migration

After you upgrade to the Sterling Selling and Fulfillment Foundation, Release 9.1, and the Application Add-in, Release 9.1, you can upgrade to Sterling Field Sales, Release 9.1.

To migrate the upgrade-transaction-tables data from Release 9.0 to Release 9.1, run the following command from the <INSTALL_DIR>/Migration/9.0/sfs directory:

```
${ANT_HOME}/bin/ant -f sfsmigration.xml -Druntime=<INSTALL_DIR>
-Druntime.old=<INSTALL_DIR_OLD> -Dtarget=upgrade-transaction-tables migrate
-logfile <logfile>
```

Running this command performs the following tasks:

- This command performs the apply-fc-setup and -update-si-version tasks.
- The following *.done files are created in the status folder for the upgrade-transaction-tables task:
 - ┆ transaction_ant_applyfcsetup.xml.done
 - ┆ sfs_transaction_ant_applicationversion.xml.done

Note: As part of the transaction data migration, only the factory defaults are upgraded.

After the tasks are completed, search for all the *.restart files under the <INSTALL_DIR>/Migration/9.0/sfs/database/FactorySetup/XMLS directory.

For the upgrade tasks to be successfully completed, ensure that the value of the Completed attribute is set to "Y" for all the tasks.

- If the value of the Completed attribute is set to "N" for any of the tasks, do not proceed with the upgrade. Contact Sterling Selling and Fulfillment Foundation Technical Support for assistance.
 - Note:** The transaction data migration is not performed in the activator mode. Therefore, the event handlers and pipeline conditions are not overridden.
- If you want to clear or remove all *.restart and *.done files before restarting the transaction data migration, run the following command:

```
${ANT_HOME}/bin/ant -f sfsmigration.xml -Druntime=<INSTALL_DIR>
-Druntime.old=<INSTALL_DIR_OLD> -Dtarget=clean-up-for-rerun migrate
-logfile <logfile>
```

Analyzing Sterling Field Sales User Interface Upgrade

Several reports, which can be used to analyze the impact of the user interface upgrade on certain Sterling Field Sales components, are provided in the Documentation CD. The reports can be accessed from the `sfs_upgrade_analysis_reports.html` file that is available in the `Upgrade_Guide/sfs/analysis` directory in the Documentation CD.

Client-Side Bundles Report

This report provides the changes in the bundle files such as `sfs_bundle.js`, `sfsformatted_bundle.js`, `sfsentence_bundle.js` and `sfsmessage_bundle.js`.

To view the bundle entry changes between Release 9.0 and Release 9.1, either use the `sfs_bundles_diff_report.html` file located in the Documentation CD under the `Upgrade_Guide/sfs/analysis/bundles/DiffDoc` directory, or click the **Client-Side Bundles Report** hyperlink in the `sfs_upgrade_analysis_reports.html` file.

If the changes made to the resource bundle entries affect any custom screens, change your customized code.

Server-Side Properties Report

This report provides the changes in the `sfsbundle.properties` file.

To view the changes in the server-side properties between Release 9.0 and Release 9.1, either use the `sfs_properties_diff_report.html` file located in the Documentation CD under the `Upgrade_Guide/sfs/analysis/properties/DiffDoc` directory, or click the **Server-Side Properties Report** hyperlink in the `sfs_upgrade_analysis_reports.html` file.

If the changes made to the properties affect any custom screens, change your customized code.

Cascading Style Sheet Report

This report provides the changes in the properties of the cascading style sheet (CSS) class files.

To view the CSS changes between Release 9.0 and Release 9.1, either use the `sfs_css_diff_report.html` file located in the Documentation CD under the `Upgrade_Guide/sfs/analysis/css/DiffDoc` directory, or click the **Css Report** hyperlink in the `sfs_upgrade_analysis_reports.html` file.

If the changes made to the CSS affect any custom screens, change your customized code.

Struts Report

This report provides the changes in the struts action classes, input and output namespaces of mashups, and the results.

To view the changes in the Struts action classes between Release 9.0 and Release 9.1, either use the `sfs_struts_diff_report.html` file located in the Documentation CD under the

Upgrade_Guide/sfs/analysis/struts/DiffDoc directory, or click the **Struts Report** hyperlink in the `sfs_upgrade_analysis_reports.html` file.

If the changes made to the Struts properties affect any custom screens, change your customized code.

Mashup Report

This report provides the changes in the mashups.

To view the mashup changes between Release 9.0 and Release 9.1, either use the `sfs_mashups_diff_report.html` file located in the Documentation CD under the Upgrade_Guide/sfs/analysis/mashups/DiffDoc directory, or click the **Mashups Report** hyperlink in the `sfs_upgrade_analysis_reports.html` file.

If the changes made to the mashups affect any custom screens, change your customized code.

Java Script Builder Report

This report provides the changes in the Java Script Builder (JSB) targets.

To view the JSB changes between Release 9.0 and Release 9.1, either use the `sfs_jsbs_diff_report.html` file located in the Documentation CD under the Upgrade_Guide/sfs/analysis/jsbs/DiffDoc directory, or click the **JSBs Report** hyperlink in the `sfs_upgrade_analysis_reports.html` file.

If the changes made to the JSB targets affect any custom screens, change your customized code.

web.xml Report

This report provides the changes in the web.xml file.

To view the web.xml changes between Release 9.0 and Release 9.1, use the `sfs_config.xmls_diff_report.html` file located in the Documentation CD under the Upgrade_Guide/sfs/analysis/webxml/DiffDoc directory.

If the changes made to the web.xml file affect any custom screens, change your customized code.

Screen SCI ID Report

This report provides the list of all the SCI IDs that have been added or deleted for a screen.

To view the SCI ID changes between Release 9.0 and Release 9.1, either use the `sfs_jsons_diff_report.html` file located in the Documentation CD under the Upgrade_Guide/sfs/analysis/sciids/DiffDoc directory, or click the **Screen sciIDs Report** hyperlink in the `sfs_upgrade_analysis_reports.html` file.

If the changes made to the SCI IDs affect any custom screens, change your customized code.

XTemplate Report

This report provides the changes in the XTemplate files.

To view the XTemplate file changes between Release 9.0 and Release 9.1, either use the `sfs_tpls_diff_report.html` file located in the Documentation CD under the `Upgrade_Guide/sfs/analysis/xtemplate/DiffDoc` directory, or click the **XTemplate Report** hyperlink in the `sfs_upgrade_analysis_reports.html` file.

If the changes made to the Xtemplates affect any custom screens, change your customized code.

Dashboard Report

This report provides the changes in the dashboards.

To view the dashboard changes between Release 9.0 and Release 9.1, either use the `sfs_dashboards_diff_report.html` file located in the Documentation CD under the `Upgrade_Guide/sfs/analysis/dashboard/DiffDoc` directory, or click the **Dashboards Report** hyperlink in the `sfs_upgrade_analysis_reports.html` file.

If the changes made to the dashboards affect any custom screens, change your customized code.

Dashlet Report

This report provides the changes in the dashlets.

To view the dashlet changes between Release 9.0 and Release 9.1, either use the `sfs_dashlets_diff_report.html` file located in the Documentation CD under the `Upgrade_Guide/sfs/analysis/dashlet/DiffDoc` directory, or click the **Dashlets Report** hyperlink in the `sfs_upgrade_analysis_reports.html` file.

If the changes made to the dashlets affect any custom screens, change your customized code.

Related Task Report

This report provides the changes in the related task metadata.

To view the related task metadata changes between Release 9.0 and Release 9.1, either use the `sfs_relatedtasks_diff_report.html` file located in the Documentation CD under the `Upgrade_Guide/sfs/analysis/relatedtasks/DiffDoc` directory, or click the **Related Tasks Report** hyperlink in the `sfs_upgrade_analysis_reports.html` file.

If the changes made to the related task metadata affect any custom screens, change your customized code.

Post-Migration Activities

Factory setup changes made to document type specific entities must be applied to custom document types. To apply the changes, you must provide a mapping between the custom document types and the out-of-the-box document types. To provide this mapping, perform the following steps:

1. Rename the `customdoctype.properties.sample` file located in the `<INSTALL_DIR>/COM/Migration` directory as `customdoctype.properties`.
2. To modify the `customdoctype.properties` file, follow the instructions provided in the sample file.
3. Run the following ant script from the `<INSTALL_DIR>/COM/Migration` folder:

```
<ANT_HOME>/bin/ant -f doc_migrator.xml migrate  
-Dtarget=migrate-custom-doc-types -logfile <logfile>
```

This will ensure that the custom document types are updated to reflect the modification types provided for the out-of-the-box document types.

The following tables are updated during the custom document type migration:

- ⋮ YFS_Status
- ⋮ YFS_Transaction
- ⋮ YFS_Transaction_Pickup_Status
- ⋮ YFS_Transaction_Drop_Status
- ⋮ YFS_Event
- ⋮ YFS_Status_Modification_Type
- ⋮ YFS_Status_Modification

After performing the migration, you need to configure Sterling Field Sales according to your business requirements. After the configuration is complete, perform the following steps:

- a. You must regenerate the db classes if you have performed extensions on the database in earlier releases. In Release 9.1, if the user wants to extend the database further, the user must generate the db classes after extending the database. To generate the db classes, go to the `<INSTALL_DIR>/bin` directory and execute the following task:
 - `deployer.cmd -t entitydeployer` for Windows operating systems
 - `deployer.sh -t entitydeployer` for UNIX or Linux operating systems
- b. Build your EAR file. For more information about building the EAR, refer to the *Sterling Field Sales: Deployment Guide*.

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