Sterling Field Sales

Upgrade Guide

Release 9.2

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Note
Before using this information and the product it supports, read the information in "Notices" on page 27.

Copyright

This edition applies to the 9.2 Version of IBM Sterling Field Sales and to all subsequent releases and modifications until otherwise indicated in new editions.

Contents

Chapter 1. Introduction

This guide explains how to upgrade to the latest release of IBM® Sterling Field Sales, which is Release 9.2. The following table provides the upgrade paths available from the earlier releases of IBM Sterling Field Sales to IBM Sterling Field Sales, Release 9.2.

From		To		Path Followed	
IBM Sterling Selling and Fulfillment Foundation Version	**IBM Sterling Field Sales Version**	**IBM Sterling Selling and Fulfillment Foundation Version**	**IBM Sterling Field Sales Version**	**IBM Sterling Selling and Fulfillment Foundation Version**	**IBM Sterling Field Sales Version**
9.1	9.1	9.2	9.2	9.1> 9.2	9.1> 9.2

Task List

When upgrading to IBM Sterling Field Sales, Release 9.2, carry out the tasks in sequence as listed in the following table:

Task	Refer to
Perform Migration Assessment	• System Requirements • Important Behavior Changes Between Release 9.1 and Release 9.2
Upgrade to IBM Sterling Field Sales, Release 9.2	• Run the Upgrade Using NFS Mounting • Upgrading to IBM Sterling Selling and Fulfillment Foundation, Release 9.2 • Installing IBM Sterling Field Sales, Release 9.2 • Pre-Migration Activities • Upgrade to Application Add-In, Release 9.2 • Factory Setup Data Migration
Post-Migration	• Analyzing IBM Sterling Field Sales User Interface Upgrade • Post-Migration Activities

Chapter 2. System Requirements

The system requirements for upgrading to IBM Sterling Field Sales, Release 9.2, are the same as that for upgrading to IBM Sterling Selling and Fulfillment Foundation, Release 9.2. For more information about the system requirements, see the *Sterling Selling and Fulfillment Foundation: System Requirements Guide*.

Chapter 3. Important Behavior Changes Between Release 9.0 and Release 9.1

This topic describes the important behavior changes in IBM 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 IBM 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 navigate 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.

Chapter 4. Important Behavior Changes Between Release 9.1 and Release 9.2

This topic describes the important behavior changes in IBM Sterling Field Sales between Release 9.1 and Release 9.2. 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 IBM Sterling Field Sales, Release 9.2, refer to the *Sterling Field Sales: Release Notes*.

Input Parameter Validation

In Release 9.2, Input Parameter Validation is used to validate all the inputs. The data validation functionality allows only explicitly defined characters in the input. This functionality ensures that the malicious scripts do not reach the business layer as the validation layer validates the data and sends it for further processing only on successful validation. The main purpose of this functionality is not to validate the individual input fields in the user interface, but to safe guard the application as a whole from external attacks like the XSS.

You can define your own validation rules for validating different request parameters. Input validation can be performed for various kinds of inputs, such as parameter name, parameter value, cookie name, cookie value, and so on. Sterling Field Sales supports regular expression based validation.

How it Affects You

In earlier releases there were no restrictions to the data that is entered at the user interface. In release 9.2, you may not be able to enter a few characters in the user interface as your administrator may have set certain validation rules for the data that is entered in the user interface.

For example, in Release 9.1, you can enter a special character such as "<" in the **Quote Name** field. Whereas, in release 9.2, if your administrator has not defined "<" in the validation rule, you may not be allowed to enter that character in the **Quote Name** field.

If the data entered by you does not pass the validation, a descriptive error message is displayed indicating the reason for the validation failure.

For more information on validation rules and customizing the validation rules, refer to the *Sterling Field Sales: Customization Guide.*

Migration Strategy

None.

Delegating Users for Approving or Rejecting a Quote

In Release 9.2, you can delegate approving or rejecting a quote to another person. The person whom you assign as the approver of a quote is termed as a delegate user. You can assign a delegate user either in your absence, or if you want the other person to approve or reject on your behalf. After setting up a delegate user, you can continue to approve or reject quotes, during the delegated period.

To delegate a user, in the **Preferences** dialog box, a new panel, **My Delegate**, has been introduced. You can use the **My Delegate** panel to search and delegate a user for a specific period of time.

How It Affects You

When Preferences dialog box is displayed, the user can search and assign a delegate user. The **getUserList** API is called to retrieve a list of users. The **getUserUiStateList API** and the **getUserHierarchy** are called to display the delegate user. For information on how to delegate users for approving or rejecting a quote, refer to the *Sterling Field Sales User Guide*.

Migration Strategy

None.

Styling Enhancement of the Quote Proposal

Styling enhancement of the Quote Proposal improves the look and feel of the generated proposal to get a better view of the contents displayed in the quote proposal. In previous versions, input fields like **Item Description** would truncate if the size of the content exceeds a certain limit. In release 9.2, the text areas which are too small are modified such that they can accommodate the complete content without any truncation. Additionally, the enterprise address and the enterprise name are printed in the proposal.

How it Affects You

In earlier releases, **SAA_GenerateQuoteProposal_9.0** service was invoked to generate the quote proposal. In Release 9.2, the **SAA_GeneratePrint** service is invoked to generate the proposal.

For more information about configuring proposal templates, refer to the *Business Center: Item Administration Guide*.

Migration Strategy

All the styles which are created using the **Jasper** service must be migrated to **FOP** (Formatting Objects Processor) styles.

Locale Selection Displayed in the Quote Proposal

Sterling Field Sales allows the Field Sales Representative to select the locale in which the proposal will be generated.

How it Affects You

In previous versions, Sterling Field Sales Representative were not allowed to choose the locale in which the proposal was generated. In Release 9.2, based on the print template selected, the locale specific formats configured for the selected template are displayed under the **Choose a Locale** drop-down list. The Field Sales Representative can select a locale in which the proposal will be generated.

For more information about configuring proposal templates, refer to the *Business Center: Item Administration Guide*

Migration Strategy

None.

Item Long Description Displayed in the Quote Printout template

In Release 9.2, the quote printout template in Sterling Field Sales is modified to display the Item long description in the quote proposal.

How it Affects You

In previous versions, the item long description was not included in the default quote printout template. In Release 9.2, **SAA_GeneratePrint** service is modified such that it fetches the item long description from the **getCompleteOrderDetails** API.

For more information about configuring proposal templates, refer to the *Business Center: Item Administration Guide*

Migration Strategy

None.

Item Attribute Values Displayed in the Quote Printout Template

In Release 9.2, the quote printout template in Sterling Field Sales is modified to display the item attribute name and its values in the quote proposal.

How it Affects You

None.

For more information about configuring proposal templates, refer to the *Business Center: Item Administration Guide*

Migration Strategy

None.

Presentation of Quote Status

In Release 9.2, the following changes have been made to the presentation of the quotes with **Pending Approval** and **Approval Rejected** status.

- In the **Quote Primary Information** Panel, the status of the quotes which are pending approval, and the quotes which are rejected, are presented as **Created (Pending Approval)** and **Created (Approval Rejected)** respectively, along with the corresponding icon and a tooltip indicating the status of the quote.
- In the **Quick Search Results** screen, **Quote Search** screen, **View Alternative Quotes** screen, and the **Opportunity Details** screen, the status of the quotes which are pending approval, and the quotes which are rejected, are presented as **Created (Pending Approval)** and **Created (Approval Rejected)** respectively, along with a tool tip indicating the status of the quote.

In earlier releases, the quotes with **Pending Approval** and **Approval Rejected** status, in the **Quote Primary Information** Panel, **Quick Search Results** screen, and **Quote Search** screen, were displayed as **Created** along with the corresponding icon and a tool tip indicating the status of the quote. For example, if a quote was pending approval, the status of the quote was displayed as **Created** with a **padlock** icon and a tooltip indicating **Pending Approval**. The quotes with **Pending Approval** and **Approval Rejected** status, in the **View Alternative Quotes** screen and **Opportunity Details** screen was displayed as **Created**.

How it Affects You

None.

Migration Strategy

None.

Manage Quote Attachments

In Release 9.2, users can upload attachments to a quote, while creating or modifying a quote. For example, the requirements of the customer might have been e-mailed to the Field Sales Representative (FSR) as a Microsoft Office Word document and the FSR may want to attach the document to the quote, while creating the quote. User can then refer to these quote attachments on a need basis. For example, while generating a proposal for the quote, the user may want to refer to a document containing customer requirements, which had been previously attached to a quote. User can also download the existing attachment and print, and can also delete the existing attachments.

To manage the attachments to a quote, a new link, **Manage Attachments**, has been introduced. User can use the Manage Attachments screen to add or delete the attachments to a quote.

How it Affects You

You can now use the Manage Attachments related task to add or delete existing attachments. The **getCompleteOrderDetails** API is called to retrieve the details of the quote to be displayed in the Manage Attachments screen. For information on how to add or delete quote attachments, refer to the *Sterling Field Sales: User Guide*.

When the user browses and selects a file the **sc.file.upload.type** widget is set to **ONSELECT**. When a single file is, or multiple files, are selected, a multipart request stores the file temporarily on the server. After selecting one or more files to be uploaded, when the user clicks the Save button, the **sc.file.upload.type** widget is set to **ONSUBMIT** and the files are saved as attachments for the quote. The

changeOrder API transfers the files from the temporary location on the server to the database.

Migration Strategy

None.

Status Modification Rules on a Quote

In Release 9.2, depending on the quote's status, you can, or cannot, modify few of the quote details. In the user interface, the fields that cannot be modified are displayed as read-only, and actions that cannot be performed are disabled.

How it Affects You

In earlier releases, you were able to edit the information of the quote fields, in the quote user interface even though the status modification rules would not permit the modification of the information in the backend. For example, in earlier releases, if a quote is in the **Presented** status, you were allowed to modify the quote and add a line to the quote. However, on save, an exception error would be thrown.

In Release 9.2, the user interface which is used for updating the quote will be enabled or disabled based on the modifications allowed for the current **status** of the quote. For example, if the Modification Type of the Quote Name is allowed in the **Presented** status, and if the corresponding quote is in the **Presented** status, you can modify the **Quote Name**.

Note: In the user interface, an element (a field or an action) is enabled or disabled based on the quote's status, provided a corresponding ModificationType exists for that particular user interface element.

Migration Strategy

None.

Applicable Manual Pricing Rules with Maximum Discount

Sterling Field Sales enables the user to perform line-level and header-level price adjustments for a quote using the manual pricing rules that have been configured in Sterling Field Sales. In Release 9.2, **Applicable Manual Pricing Rules With Maximum Discount** enables you to view only the relevant manual discount rules in manual discount rule selection list.

How it Affects You

In previous versions, you were able to view all the manual pricing rules for an enterprise while performing price adjustments for a quote. In Release 9.2, you will be able to view only the applicable manual pricing rules for the quote.

In earlier versions, the **getPricingRuleList** API was called to retrieve all the available manual pricing rules in the **Adjustment** dropdown. In release 9.2, Sterling Field Sales calls the **getApplicablePricingRulesForOrder** API instead of the **getPricingRuleList** API. The **getApplicablePricingRulesForOrder** API, returns only the list of applicable manual pricing rules for the quote.

For more information about creating a manual pricing rule, refer to the *Business Center: Pricing Administration Guide.*

Migration Strategy

None.

Generate a Proposal

Sterling Field Sales provides the Generate Proposal related task to enable a user to generate a proposal for a quote. A user can print the proposal as a PDF by selecting the PDF format from the Choose a print format drop-down list, which is generated using the SAA_GeneratePrint service.

How it Affects You

In previous versions, Jasper Print was used to generate the proposal. In Release 9.2, Apache FOP (Formatting Objects Processor) component is used to generate the proposal.

When a user clicks **Generate** in the Generate Proposal screen, the **SAA_GeneratePrint service** is invoked to generate the proposal. Based on the selected template and locale, the processPrint API retrieves the configured format and along with the XML, generates the proposal in the selected format (PDF) using the Apache FOP (Formatting Objects Processor) component.

In Release 9.2, out of the box, Sterling Field Sales uses the FOP component for printing proposals. However, to retain the customizations done in earlier releases, **/sfs/quote/manage/printJasperProposal.jsp** file has been introduced in the repository.

If you want to retain the proposals generated using the Jasper Print in earlier releases, customize the **sfs_quotes_struts.xml** and point the JSP of the PrintProposal to the newly created **/sfs/quote/manage/printJasperProposal.jsp** file.

Note: In Release 9.2 all the template XML files are stored in the database. Ensure that all the existing template XML files and the customized template XML files are migrated to the database using the Sterling Business Center user interface.

For more information on the Implementation of Generating a Proposal, refer *Sterling Field Sales: Implementation Guide.*

Migration Strategy

None

Chapter 5. Run the Upgrade Using NFS Mounting

About this task

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 IBM Sterling Selling and Fulfillment Foundation on the database server, use NFS mounting.

To use NFS mounting:

Procedure

1. Create a user on the database server with the user identification (UID), and group identification (GID) as the user who installed the IBM 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 IBM Sterling Selling and Fulfillment Foundation, Release 9.2, 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 IBM 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 IBM Sterling Selling and Fulfillment Foundation administrator on the database server.

Chapter 6. Upgrading to IBM Sterling Selling and Fulfillment Foundation, Release 9.2

Before upgrading to IBM Sterling Field Sales, Release 9.2, ensure that you have upgraded to the IBM Sterling Selling and Fulfillment Foundation, Release 9.2, and installed the latest hotfix. When you upgrade to the IBM Sterling Selling and Fulfillment Foundation, Release 9.2, the following tasks are performed that impact IBM Sterling Field Sales:

- Alters the schema
- Copies the current customizations

For more information about upgrading to IBM Sterling Selling and Fulfillment Foundation, Release 9.2, refer to the *Sterling Selling and Fulfillment Foundation: Upgrade Guide*.

Chapter 7. Installing IBM Sterling Field Sales, Release 9.2

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 IBM Sterling Field Sales, Release 9.2.

  For more information about installing IBM Sterling Field Sales, Release 9.2, refer to the *Sterling Selling and Fulfillment Suite: Applications Installation Guide*.

Chapter 8. Pre-Migration Activities

Before upgrading IBM 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, IBM Sterling Field Sales allows you to pass JVM-specific JAVA and ANT arguments in the <INSTALL_DIR>/Migration/9.1/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`

Chapter 9. Transaction Data Migration

After you upgrade to the IBM Sterling Selling and Fulfillment Foundation, Release 9.2, you can upgrade to IBM Sterling Field Sales, Release 9.2.

To migrate the upgrade-transaction-tables data from Release 9.0, 9.1 to Release 9.2, run the following command from the <INSTALL_DIR>/Migration/9.1/sfs directory:

Running the following command performs the following tasks:

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

- 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/9.1/sfs/database/FactorySetup/XMLS directory.

To ensure that the upgrade is successfully completed, the value of the Completed attribute in the *.restart files under the <INSTALL_DIR>/Migration/9.1/sfs/database/FactorySetup/XMLS directory should be set to "Y" for all the tasks.

- If the value of the `Completed` attribute is set to "N" contact IBM Sterling Selling and Fulfillment Foundation Technical Support for assistance.

  Note: The transaction data migration is not performed in the activator mode. Therefore, the event, the event handlers and the 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>
  ```

Chapter 10. Analyzing IBM Sterling Field Sales User Interface Upgrade

Several reports, which can be used to analyze the impact of the user interface upgrade on certain IBM 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`, `sfssentence_bundle.js` and `sfsmessage_bundle.js`.

To view the bundle entry changes between Release 9.1 and Release 9.2, 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 9.1 and Release 9.2, 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 9.1 and Release 9.2, 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 9.1 and Release 9.2, 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 9.1 and Release 9.2, 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 9.1 and Release 9.2, either use the `sfs_jsbs_diff_report.html` file located in the Documentation CD under the `Upgrade_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 9.1 and Release 9.2, 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 9.1 and Release 9.2, 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 9.1 and Release 9.2, 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 9.1 and Release 9.2, 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 9.1 and Release 9.2, 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 9.1 and Release 9.2, 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.

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