

***Cleo* EEI™**

Upgrade Guide

Detailed instructions for upgrading to Cleo EEI Release v7.1.



May 2017

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General Information

This document provides steps to upgrade to Cleo EEI Release v7.1 from these previous releases: v6.4 and v6.5 only. If you are not at one of these release levels, you must first upgrade to v6.4 minimally before performing the upgrade to v7.1. Please contact Technical Support at 866-444-2536 (CLEO) for assistance.

This process must be performed by a user ID with *ALLOBJ and *SECADM authority (for example: QSECOFR). All objects as shipped from Cleo are owned by user EXTLOWN with IBM default *PUBLIC authorities as on the various CRTxxx commands, except for certain data files which require *PUBLIC *ALL authority.

Note: To follow Sarbanes-Oxley (SOX) compliance, the authority on the Cleo EEI libraries has been changed to exclude public profiles. Cleo EEI users must have EXTLOWN group (or supplemental group) authority in their profiles to be authorized to the Cleo libraries and the objects in them.

Default program library names

The Cleo system, file, and message queue libraries have default names EXTSYS, EXTSYSF, and EXTINTMSGQ, respectively. During installation, you may have assigned different names to these libraries. If so, replace the default names used in these instructions with the actual library names on your system. This process will replace the Cleo program library (default name EXTSYS). Any user objects or changes to source code as provided by Cleo and placed into this library should be copied to another library prior to beginning the upgrade process.

How long will this upgrade take?

The time required to perform this upgrade is estimated to be less than one hour on a dedicated system. On a busy system, depending on configuration, workload, etc., it could take longer. On small systems with entry-level CPU, memory, or disk configurations, the time required to perform this process may be two hours or more, even for a dedicated system.

Disk Storage Requirements

The approximate disk storage requirements for EEI Release v7.1 are:

Install Library	578 MB	Can be deleted after a successful install.
Code and Files Library	1225 MB*	(Depends on standards applied) *Plus whatever data you are storing
Tutorial Library	2 MB	Optional
Web Facing Objects	68 MB	Optional

The minimum required O/S level is V7R1 or higher.

Upgrade Procedures

These installation steps take place after obtaining the ISO from the Cleo Support Portal, and following the procedures provided there.

Before beginning the upgrade, ensure that no other users are signed into the Cleo EEI environment.

1. Sign on to a System i session as the system security officer.

Ensure system value QALWOBJRST is set to *ALL. The *ALL value allows the restore of all objects regardless of security sensitive attributes.

2. Type WRKOBJLCK OBJ(EXTSYS) OBJTYPE(*LIB) and press Enter to make sure that no one is using the Cleo system. The only job, if any, should be the current job.

Note: In order to ensure that all potential users of the Cleo system (including automatic calls to the Cleo system) do not attempt to use the system until this process has completed, the upgrade process will obtain exclusive locks on certain critical objects in the EXTOL libraries.

Type WRKOBJLCK OBJ(EXTSYSF) OBJTYPE(*LIB) and press Enter to make sure that no one is using the Cleo files library.

3. Type SAVLIB and press F4 to prompt the Save Library command, which allows you to back up the EXTSYS and EXTSYSF libraries. Set the Save active parameter (SAVACT) to *NO.

If the upgrade process does not complete (perhaps due to media error, device failure, or general system failure), you may be required to restore the previous version of EDI.

A save of connection data is not a library backup! Also, do not use the Save Changed Objects command (SAVCHGOBJ).

4. Type CHGLIBL EXTINSTALL and press Enter to leave only the EXTINSTALL library in the user portion of the library list.

5. Type ENDSBS SBS(EXTOL) and press Enter to end the EXTOL subsystem, if it is running.

WARNING: If you have multiple copies of the Cleo system library (default name EXTSYS) and wish to run Cleo jobs using one copy of the library while upgrading another copy, the active Cleo subsystem must be started using the subsystem description from a library other than the library being upgraded.

Please contact Technical Support if you require additional information.

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6. Type WRKRPYLE and press Enter to display the Work with System Reply List Entries panel.

The value that you will specify (in step #8) for the System reply list start seq # parameter (SEQNBR) of the Update Cleo EEI command (EDIUPDATE) depends upon the presence/values of these message IDs:

CPA5700
CPA5805
CPA5806
CPA5880
CPA5800
CPA5900

- If there are no entries for these message IDs, use the default 1010
- If entries for ALL of these message IDs are present with a Compare Value of EXT, use *NONE

If entries for ANY of these message IDs are present with a Compare Value of *NONE AND there are no entries with a Compare Value of EXT, you must specify a sequence number lower than the lowest sequence number used for these message IDs.

7. Type DSPLIB LIB(EXTSYSFSC) and press Enter to check for the existence of library EXTSYSFSC.

If it is present, type DLTLIB LIB(EXTSYSFSC) and press Enter to delete.

8. Type EDIUPDATE and press F4 to prompt the Update Cleo EEI command; press F10 to see additional parameters.

```
Type choices, press Enter.
Job Queue for submit . . . . . *JOBBD      Name, *JOBBD
Library . . . . .                Name, *LIBL, *CURLIB
EXTOL system library name . . . . . EXTSYS      Name
EXTOL files library name . . . . . EXTSYSF     Name
System object save library . . . . . EXTSYSB     Name
File object save library . . . . . EXTSYSBF    Name
System reply list start seq # . . . . . 1010      1-9990, *NONE

                        Additional Parameters

Restart at step A, B, ... . . . . *START      A-Z, *START
Stop after step A, B, ... . . . . *END        A-Z, *END

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

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This table describes parameters for the Install Cleo Integrator command.

Parameter	Description
Job Queue for submit	JOBQ – The job queue name used for the submit of the release upgrade and optionally the library where it is located. The default is *JOBQ. This should not be EXTOL, as that subsystem has been ended. <i>(Uses the current user's default JOBQ)</i>
Cleo system library name	EXTSYS – The name of the library which currently contains Cleo EEI programs. The default is EXTSYS .
Cleo files library name	EXTSYSF – The name of the library which currently contains Cleo EE I files. The default is EXTSYSF .
System object save library	EXTSYSB – The current code library name is renamed to this unique name – this library CANNOT already exist. Furthermore, this library is not used to save all system objects, and therefore cannot be used as a backup to EXTSYS . The default is EXTSYSB .
File object save library	EXTSYSBF – The name of a NON-EXISTING library that will be used to store copies of files during the upgrade process. This library is not used to save all file objects, and therefore cannot be used as a backup to EXTSYSF . The default is EXTSYSBF .
System reply list start seq #	SEQNBR – Specifies the starting sequence number for system reply list entries, which are required for automatic communications support (for example, network alternate port). The default is 1010 . *NONE may also be used to specify that no reply list entries are to be created. Use the value as determined in step #10.
Restart at step A, B, ...	RESTART – The starting point to be used by the upgrade program. The default is *START. If the upgrade program ends abnormally (perhaps because of a system or device failure), contact Technical Support. The job log will be analyzed and, using this parameter, the program may be restarted at the appropriate point.
Stop after step A, B, ...	STOPAFTER – The ending point to be used by the upgrade program. The default is *END. If the upgrade program ends abnormally (perhaps because of a system or device failure), contact Technical Support. The job log will be analyzed and, using this parameter, the program may be restarted and then stopped at the appropriate point.

- After specifying the parameters, press Enter to display the Select Standards For Installation panel, which allows you to specify that one or more or all of the standards shipped with Cleo EEI Release v7.1 be installed.

```

SRVDFOR          Select Standards For Installation          6/21/06 10:34:37
EXTOL EDI Integrator 5.9.0

      Std  Ind  VerRel
      cls  grp
      -  -  -----
                                     Install all standards: N

Type options, press Enter.
1=Select
  Std  Ind  VerRel  Version description
Opt  cls  grp
-    A    A    1      Version 1
-    A    A    8      Version 8
-    A    A    9      Version 9
-    F    B    003INV  BISAC - Invoice
-    F    B    003PO   BISAC - Purchase Order
-    F    B    003POA  BISAC - Purchase Order Acknowledgement
-    F    E    001010  1984 EMBARC Standard with 1988 updates
-    F    H    002.00  Version 002.00
-    F    H    004.00  UB-92 Version 4.0
-    F    H    005.00  UB-92 Version 5.0
  
```

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To install all shipped standards, change the N in the Install all standards field to Y and press Enter. Otherwise, type 1 (Select) in the Opt field for each of the standards you wish to install. You must select at least one standard.

Note: Any standards that already exist in the files library being upgraded will be overwritten. If additions have been made, those additions will subsequently be copied back into the files library being upgraded.

The *Select Standards For Installation* process only ADDS new standards. It cannot be used to selectively delete standards. A new option on the product's Standards menu allows for selective standards deletion.

10. Press Enter to continue, and then press Enter again to confirm.

If the parameters are valid, a job will be submitted to perform the upgrade. This job will produce RSTOBJ printouts and both *MSG and *SECLVL versions of the job log.

When the process completes, a "normal completion" message is sent to the EXTINSTALL message queue. To display the message queue, type: DSPMSG EXTINSTALL/EXTINSTALL and press Enter.

Notes: If you have only one Cleo EEI files library, the upgrade process is complete. Otherwise, please see *Additional Environments -Technical Memo 2012-266*, for instructions.

This upgrade process replaces the Cleo printer files in library EXTSYS. You may have previously modified these to allow for a different number of lines per inch and/or lines per page, for example. If so, use the Change Printer File command (CHGPRTF) to make those modifications again.

11. If you would like to change the environment name that appears at the top left of the EXTOL screens, use command 'CHGENVNAM'.

```
XMAIN                               Cleo EEI Main Menu                               5/12/17 15:49:29
Level . : 1
Cleo EEI 7.1.0                       System: EXPAP71
Select one of the following:

    1. Mailroom
    2. Scheduling System
    3. Archiving and Data Management
    4. Trading Partners and Networks
    5. Mapping
    6. Standards
    7. Electronic Customer Support
    8. System Configuration
    9. Reports
   10. Communications Setup
   11. e-send

   90. Sign off

      Change environment name (CHGENVNAM)
```


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Type choices, press Enter.

Library name	*LIBL	Name, *LIBL
Display attribute (hex)	*SAME	20-3F, *SAME, *NONE
*Same, *None, environment name	*SAME	
.			
Create environment objects	*NO	*NO, *YES

If you only have one environment, then the Library name entered will be your Cleo programs library. When in the Cleo environment, the default value *LIBL will suffice.

For a list of the display attribute values, press F1 (help) with your cursor on that field and in the help panel, place your cursor on the DSPATR highlighted in yellow, and hit enter. This provides a list of display attribute values and the effect of those values on your display device.

The Cleo environment name is the text that will appear in the environment name field. If you only have one environment then the Create environment objects parameter will be *NO.

The environment name is stored in a data area called YCOTXA. The data area is shipped in the programs library. When you have more than one environment, you should use the files library for library name and set Create environment objects to *YES so that the data area will be copied into the files library. Since your files library occurs before your programs library in your library list, this allows different names to be displayed for the different environments.

Optional Step

Note: After running the upgraded product for a period which you deem to be sufficient, you may wish to delete the EXTSYSB and EXTSYSBF libraries (or whatever you provided as input for the System object save library and File object save library parameters, respectively, on step 12.