iBaan ERP 5.2a Exchange

Installation and Deployment Guide for the Generic Exchange Scheme
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*Installation and Deployment Guide for the Generic Exchange Scheme*
About this document

This document provides the procedure steps that you must follow to install the generic exchange scheme.

This document consists of the following steps:

Chapter 1, “Introduction,” provides a general overview of the generic exchange scheme and an overall introduction to this document.

Chapter 2, “To install the generic exchange scheme,” provides the procedure steps to perform the actual generic exchange scheme installation.

Chapter 3, “To customize the generic exchange scheme,” describes several customizations that you can make to the generic exchange scheme.

Chapter 4, “To run the generic exchange scheme,” describes the steps that you must take to export and import exchange schemes.
Installation and Deployment Guide for the Generic Exchange Scheme
1 Introduction

Purpose

A generic exchange scheme is available for transferring exchange schemes. You can use this exchange scheme to install standard exchange schemes delivered by Baan or Baan partners. You can also use this exchange scheme to copy customer-specific exchange schemes to other companies or systems, for example, in a multisite environment.

This document explains how to install and use the generic exchange scheme.

Overview

The generic exchange scheme for iBaan ERP 5.2a is called xch30a and contains a single batch BATCH for exporting and importing exchange schemes.

The procedure to set up and use the generic exchange scheme consists of the following steps:

1. Install the generic exchange scheme.
2. Customize the generic exchange scheme.
3. Create the exchange programs and run the generic exchange scheme.

The precise procedures for these steps are described in detail in the following chapters.

NOTE

This document is not valid for releases earlier than iBaan ERP 5.2a. In previous releases, generic exchange schemes were also delivered, however, the procedures to install and use those schemes was different from the procedure to install generic exchange schemes in iBaan ERP 5.2a and later.

The iBaan ERP 5.2 generic exchange scheme cannot directly import exchange schemes that are exported with generic exchange schemes delivered with earlier iBaan ERP releases.
References

For more information, refer to the following documentation:

- *iBaan ERP 5.2a Release Notes Exchange* (P3301A US)
- *iBaan ERP Exchange Online Help*
2 **To install the generic exchange scheme**

To install the generic exchange scheme, take the following steps.

1. The files to be installed for the generic exchange scheme are, by default, stored in the $BSE/lib/exchange/schemes/xch30a directory. You can move these files, however, that must be taken into account when you perform the installation. If you use FTP to copy the files, for best results, you must use the ASCII mode.

2. Start iBaan ERP.

3. Check whether you have an exchange scheme called xch30a in the specified company, which is the name of the generic exchange scheme that you must create. You can view the existing exchange schemes in the Exchange Schemes (daxch0501m000) session. If you already have an exchange scheme called xch30a, you can rename the existing exchange scheme to a new name in the Copy Exchange Scheme (daxch0201m000) session and delete the old xch30a scheme in the Delete Exchange Scheme (daxch0222m000) session.

4. From the Menu Browser, click **Tools ➤ Database Management ➤ Database Utilities ➤ Create Table from Sequential Dump**. The Create Table from Sequential Dump (ttaad4227m000) session appears, as shown in the following figure.
To install the generic exchange scheme

5 Use the parameter settings for this session shown in following figure. The company number to be given, which is 120 in the example, must be the company where you want to store and run the exchange scheme. This company can be either your working company or another company in which the user wants to use the interface.

6 Click Create to install the generic exchange scheme. This process adds the exchange scheme xch30a to your database.
After the process is complete, iBaan ERP prompts the user to run the Reorganize Tables (ttaad4225m000) session. The following figure shows the parameter settings to be used in this session.

You must specify the same company range as the range that you selected for the previous session, as described in Step 5 of this procedure.

NOTE

Click **Reorganize** to start the process.

Click **Close** after this process is complete to close the session.

The installation is now complete. However, before you start to use the generic exchange scheme, you must adapt this exchange scheme to your environment, as described in Chapter 3, “To customize the generic exchange scheme,” and you must create and run the export and import programs, as described in Chapter 4, “To run the generic exchange scheme.”
To install the generic exchange scheme
To customize the generic exchange scheme, take the following steps:

1. Return to the iBaan ERP Menu Browser and click **iBaan ERP ➤ Exchange Master Data ➤ Batches**. The Batches (daxch0104m000) session starts.

2. The parameter setting that you must use in this session are shown in the following figure. Change the setting in the **Company** field to the current working company of the user, or to any other company you want to export exchange schemes from or import exchange schemes into.

3. The generic exchange scheme is the same as any other exchange scheme, therefore, you can adapt this exchange scheme to your needs.

   In the Exchange Schemes (daxch0501m000) session, you can specify where the exchange schemes must be written to or read from, where the log files are stored, and so on.

   In the Table Relations (daxch0531m000 for export or daxch0521m000 for import) session, you can switch table relations on or off. Note that, by default, the table relations for daxch008 and daxch009 are not active, so the log tables will not be included.
To customize the generic exchange scheme
To run the generic exchange scheme

To export exchange schemes

To export one or more exchange schemes, take the following steps:

1. On the iBaan ERP Menu Browser, click iBaan ERP Exchange ➤ Export Module ➤ Create Export Programs to run the Create Export Programs (daxch0228m000) session for exchange scheme xch30a, batch BATCH.

2. Run the actual export in the Export Data Non-Regular (daxch0233m000) session for exchange scheme xch30a, batch BATCH.

   **NOTE**
   To start this session, you can Export Data in the Create Export Programs (daxch0228m000) session.

   If the exchange schemes to be exported are in another company, to export the exchange schemes, you can select the Overrule Batch Company check box in the Create Export Programs session and fill in the company number.

3. The resulting files will be in the location specified in the ASCII Files field for the exchange scheme xch30a in the Exchange Schemes (daxch0501m000) session.

   Note that the generic exchange scheme is like any other exchange scheme. Refer to the iBaan ERP Exchange online Help topics for more information on how to adapt and use exchange schemes.

   **NOTE**
   By default, the generic exchange scheme exports all the exchange schemes from the company.

   If you must export a subset of the exchange schemes from a company, you can use one of the following methods:

   - Copy the exchange schemes you need to another company that does not contain any exchange schemes and run the export for that company. You can copy exchange schemes in the Copy Exchange Scheme (daxch0201m000) session.
To run the generic exchange scheme

- You can edit the files after the export. Simply delete the lines that are not required from the ASCII files. In a number of cases, this method is easiest way to export a subset of the exchange schemes. Note, however, that a manual action always involves the risk of mistakes. You can use an operating system command such as 'grep' (UNIX). Note, however, that you cannot use this method for files containing multiline texts, because the texts will be lost, especially condition scripts in file daxch014.S.

- You can define a range for the generic exchange scheme in the Ranges (daxch0112m000) session. You must define the range for all tables on the field 'cxch'. Alternatively, you can write a condition script and link this script to all table relations of the generic exchange scheme in the Table Relations (Export) (daxch0531m000) session. The following is an example of a condition script: return( cxch = "scheme1" or cxch = "scheme2" )

An advantage of the condition script compared to using ranges is that if you must change the condition script, you only must change the script once.

To import exchange schemes

To import one or more exchange schemes, take the following steps:

1. Make sure that the files to be imported are in the location specified in the Exchange Schemes (daxch0501m000) session, in the ASCII Files field for exchange scheme xch30a.

2. On the iBaan ERP Menu Browser, click **iBaan ERP Exchange ➤ Export Module ➤ Create Import Programs** to start the Create Import Programs (daxch0227m000) session for exchange scheme xch30a, batch BATCH.

3. Run the actual import using the Import Data Non-Regular (daxch0223m000) session for exchange scheme xch30a, batch BATCH.

   **NOTE**

   To start this session, you can click **Import Data** in the Create Import Programs (daxch0227m000) session.

   To import the exchange schemes into another iBaan ERP company, in the Import Data session, you can select the **Overrule Batch Company** check box and fill in the company number.

4. In the Import Data Non-Regular session, click **Log Table** to view the results. If no records are counted as Error Rej or Records Skipped, the import was successful. If records are rejected or skipped, you can check the log file, which is stored in the location as specified in the Exchange Schemes (daxch0501m000) session, in the **Errors / Log Files** field for the exchange scheme xch30a.