

PER/ZIP4
New CD-ROM Installation Process
Introduction and Overview

We are pleased to announce that we have streamlined the PER/ZIP4 installation process so that all PER/ZIP4 components can be installed with a single LODRUN command. Required components (PER/DPV and PER/LLK) are automatically installed with PER/ZIP4, eliminating the need to install them separately. Installation and use of PER/SLK remains optional. However, if selected for installation, PER/SLK will be installed with PER/ZIP4, eliminating the need to install it separately.

We have also taken this opportunity to address one of the most common complaints associated with the installation of PER/ZIP4 updates.

Install While Active

The installation process and PER/ZIP4 have been improved to allow for the installation of PER/ZIP4 updates while users are actively using the product. **Yes, monthly updates can now be installed while users are actively using PER/ZIP4.** This is a significant enhancement that will allow PER/ZIP4 updates to be installed at time convenient for you. The requirement that PER/ZIP4 not be in use during the installation of monthly updates has long been a burden for many of our clients. We are pleased to say that those days are behind us.

To accommodate the new *Install While Active* feature, we have slightly modified the library structure for PER/ZIP4. This change is designed to be completely transparent to users and requires no program changes. When installing from the new CDs for the very first time, the existing PER/ZIP4 libraries will be converted to the new library structure. **The one time conversion of PER/ZIP4 libraries does require that PER/ZIP4 not be in use.**

Previously, PER/ZIP4 resided in only two libraries; MLCTRL and MLLIBR. These two libraries are still used by PER/ZIP4. However, there is now an additional separate library for each month's update. The new libraries follow the naming convention *MLyyymm*. Where *yy* is the year, *mm* is the month, and *v* is the version (A, B, C, etc.) of the update. For example the January 2010 PER/ZIP4 library name is ML1001A.

Again, no program changes are required on your part. Just as before, make sure that MLLIBR and MLCTRL are in the user's library list before accessing PER/ZIP4. PER/ZIP4 will handle editing the user's library list with the update specific library, *MLyyymm*.

Host Up To Three Versions

The installation process and PER/ZIP4 have also been improved to allow up to three versions of PER/ZIP4 to exist on your system simultaneously. This improvement allows you to install and test a new version of PER/ZIP4 before placing it into production. This improvement also allows you to revert back to a previous version of PER/ZIP4 in the event you discover an issue with the latest version of PER/ZIP4 after it has been placed into production.

We refer to the three installed versions of PER/ZIP4 as *TEST*, *PRODUCTION*, and *PREVIOUS*. By default, all users access the *PRODUCTION* version of PER/ZIP4. *TEST* and *PREVIOUS* versions are accessible by using a new parameter available on the **STRPERZIP4** command.

To access the *PREVIOUS* version of PER/ZIP4, type: **STRPERZIP4 *PREV**. To access the *TEST* version of PER/ZIP4, type: **STRPERZIP4 *TEST**. To access the *PRODUCTION* version of PER/ZIP4, just type: **STRPERZIP4** as you always have.

New PER/ZIP4 updates can be installed as *TEST* or *PRODUCTION* versions. If a PER/ZIP4 update is installed as a *TEST* version and there is already a *TEST* version installed, the existing *TEST* version is removed from your system.

If a PER/ZIP4 update is installed as a *PRODUCTION* version, the existing *PREVIOUS* version (if any) is removed from your system, the existing *PRODUCTION* version becomes the *PREVIOUS* version, and the newly installed update becomes the *PRODUCTION* version.

If you do not wish to deal with the complexity of managing three versions, you can simply accept the default values and always install your updates to the *PRODUCTION* environment.

Managing The PRODUCTION Version

With up to three versions of PER/ZIP4 installed, the ability to manipulate the versions between *TEST*, *PRODUCTION*, and *PREVIOUS* environments becomes necessary. We have created a new command (**PERSETVER**) to support this function.

The **PERSETVER** command establishes either the current *TEST* version or the current *PREVIOUS* version as the new *PRODUCTION* version. The **PERSETVER** command can be executed at any time; even while users are actively using PER/ZIP4. The **PERSETVER** command has no immediate effect on users. Each user will begin using the newly established *PRODUCTION* version only after exiting and returning to the PER/ZIP4 application.

To promote a *TEST* version of PER/ZIP4 to *PRODUCTION* use the following command:

MLLIBR/PERSETVER *TEST

This will cause the existing *PREVIOUS* version (if any) to be removed from your system, the existing *PRODUCTION* version to become the *PREVIOUS* version, and the existing *TEST* version to become the *PRODUCTION* version.

To revert back to a *PREVIOUS* version of PER/ZIP4, use the following command:

MLLIBR/PERSETVER *PREV

This will cause the existing *TEST* version (if any) to be removed from your system, the existing *PRODUCTION* version to become the *TEST* version, and the existing *PREVIOUS* version to become the *PRODUCTION* version.

The following pages provide step-by-step instructions for installing from the new CDs. Please note that when installing from the new CDs for the first time, the existing PER/ZIP4 libraries must be converted to the new library structure. This step requires that PER/ZIP4 not be in use. The conversion is only necessary when installing from the new CDs for the very first time. This step can be submitted to batch for after-hours execution.

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Installing PER/ZIP4 from the new CDs for the first time

When you install from the new CDs for the first time, the existing PER/ZIP4 libraries will be converted to the new library structure. The one time conversion of PER/ZIP4 libraries requires that PER/ZIP4 not be in use. To assist in meeting this requirement, we have provided the option to submit the conversion step to batch. The batch job can be scheduled to run at a time that PER/ZIP4 is not in use. This works very similar to our old "Batch-Unattended" installation option.

If conversion of PER/ZIP4 libraries is required, you will encounter the following screen during the installation process:

```
PER/MAIL - PRODUCT MANAGEMENT                               System:  S10FDE81
PRODUCT INSTALLATION

The PER/MAIL products on your system require a one-time conversion in order to
be compatible with our enhanced method of providing updates. This requires
that no one is currently using any PER/MAIL application while the conversion
is running. If you choose to run the conversion interactively, you will be
prompted to load the current update after the conversion is completed. If you
choose to submit the conversion to batch, you will need to load the current
update after the submitted job has successfully completed.

Select one of the following:

    1. Run interactively
    2. Submit to batch

===> 1

-----
F3=Exit
```

As the screen indicates, you can choose to perform the library conversion immediately by selecting option 1. PER/ZIP4 cannot be in use while this process is active. After the library conversion is complete you will be presented with the Product Management screen allowing you to continue with installation of the latest PER/ZIP4 update.

If PER/ZIP4 is in use at this time, you can choose to submit the library conversion process to batch by selecting option 2. If you select option 2, the following screen will be displayed:

```
PER/MAIL - PRODUCT MANAGEMENT                               System:  S10FDE81
                                PRODUCT INSTALLATION

Enter submit options:

Hold on job queue . . . . . *JOBD                *JOBD, *NO, *YES
Schedule date . . . . . *CURRENT                Date, *CURRENT, *MONTHSTR...
Schedule time . . . . . *CURRENT                Time, *CURRENT

                                                ... *MONTHEND
                                                *MON
                                                *TUE
                                                *WED
                                                *THU
                                                *FRI
                                                *SAT
                                                *SSUN

-----
F3=Exit
```

The screen above gives you the opportunity to specify a scheduled date and time for execution. Of course, you will want to schedule the job to run at a date and time that you know PER/ZIP4 will not be in use. When you press ENTER on this screen, a batch job named PERCVTBAT will be submitted.

After the batch job PERCVTBAT completes, PER/ZIP4 libraries are converted and your users will be able to continue using the currently installed version of PER/ZIP4. The currently installed version will be utilizing the new PER/ZIP4 library structure.

You can now install the newest version of PER/ZIP4 from the new CDs while users are actively using PER/ZIP4 by simply starting over with the **LODRUN** command.

Installation

Installing a PER/ZIP4 update from the new CDs is much simpler than the previous installation process. We have streamlined the installation so that all components are installed using a single **LODRUN** command.

You can install a PER/ZIP4 update from the new CDs at any time. There is no need to have users exit the PER/ZIP4 application. And, there is no reason to wait for an after-hours opportunity.

When you install PER/ZIP4 from the new CDs for the first time, the existing PER/ZIP4 libraries will be converted to the new structure. Details regarding this one time conversion of PER/ZIP4 libraries are provided in the section of this document titled *Installing PER/ZIP4 from the new CDs for the first time*.

Installation Authority

The user installing PER/ZIP4 must have *ALLOBJ and *SECADM special authorities. These special authorities are required to allow the installation process to delete, create, and modify libraries, objects, and user profiles. If the installing user doesn't have adequate authority, the installation will not run properly.

Step-By-Step Instructions

Follow these simple steps to install the PER/ZIP4 update:

1. Sign off and sign on again before installing PER/ZIP4 to insure a "clean session". Make sure that you sign on as a user with both *ALLOBJ and *SECADM special authorities.
2. Please be sure that QTEMP is in your library list.
3. Load the PER/ZIP4 Volume 1 CD into your system's CD drive.
4. The installation involves only one command;
Type: **LODRUN DEV(device name)** and then press ENTER.
5. Load the PER/ZIP4 Volume 2 through 5 CDs as prompted. Depending upon the modules being installed, you may not be prompted to load all volumes.

The next few pages display and explain the screens that you will see during the installation process.

The first screen displayed during installation will look similar to the following:

```
PER/MAIL - PRODUCT MANAGEMENT                               System:  S10FDE81

Installing the system for the first time . . .

The following libraries will be created: MLCTRL, MLLIBR,
MLyyymm (yy = year, mm = month, v = version)

Installing a release upgrade . . .

The following library will be created: Mlyymm (yy = year,
mm = month, v = version)

Call WorksRight Software, Inc. at (601) 856-8337 if you have
any non-PER libraries with these names.

Press Enter to continue.

-----
F3=Exit
```

When the screen above is displayed, press ENTER.

If you are installing from the new CDs for the first time, the following screen will be displayed:

```
PER/MAIL - PRODUCT MANAGEMENT                               System:  S10FDE81

PRODUCT INSTALLATION

The PER/MAIL products on your system require a one-time conversion in order to
be compatible with our enhanced method of providing updates. This requires
that no one is currently using any PER/MAIL application while the conversion
is running. If you choose to run the conversion interactively, you will be
prompted to load the current update after the conversion is completed. If you
choose to submit the conversion to batch, you will need to load the current
update after the submitted job has successfully completed.

Select one of the following:

1. Run interactively
2. Submit to batch

===> 1

-----
F3=Exit
```

If the previous screen is displayed, then PER/ZIP4 must convert your existing PER/ZIP4 libraries to our new library structure before the update can be installed. The one time conversion of PER/ZIP4 libraries requires that PER/ZIP4 not be in use.

Details regarding this one time conversion of PER/ZIP4 libraries are provided in the section of this document titled *Installing PER/ZIP4 from the new CDs for the first time*. Follow the instructions in that section. Once the existing libraries are converted to the new library structure, you can proceed with the installation of the PER/ZIP4 update.

The next screen displayed during the installation process allows you to indicate which product(s) you wish to install and whether you wish to install to *TEST* or *PRODUCTION*. The screen will look similar to the following:

PER/MAIL - PRODUCT MANAGEMENT

Type options, press Enter.
1=Install 4=Delete

Opt	Product	Type	Description	Size MB	Installed Status	Prod Level	Test Level
<u>1</u>	PER/ZIP4	Base	Postal coding	2211	INSTALLED	0911A	.....
-	PER/ZIP4	Option	eLOT database	345	.....	.....	.....
-	PER/ZIP4	Option	Occupancy database	100	.....	.....	.....
-	PER/ZIP4	Option	SUITE-Link database	677	.....	.....	.....
-	PER/SORT	Base	Postal presorting	43	.....	.....	.....

System: **S10FDE81**
Media level: 0912A
Device: OPTVIR

Currently installed products and components will be preselected.

P P = load to production, T = load to test

F3=Exit

As explained in the *Introduction and Overview* section of this document, if a PER/ZIP4 update is installed as a *TEST* version and there is already a *TEST* version installed, the existing *TEST* version is removed from your system.

If a PER/ZIP4 update is installed as a *PRODUCTION* version, the existing *PREVIOUS* version (if any) is removed from your system, the existing *PRODUCTION* version becomes the *PREVIOUS* version, and the newly installed update becomes the *PRODUCTION* version.

The PER/ZIP4 database, PER/DPV and PER/LLK are all installed with the PER/ZIP4 Base Postal Coding selection. They are not listed separately because they are all required components. The three remaining optional components are listed separately.

eLOT Database

The optional PER/ZIP4 component eLOT database should be selected if you are using PER/ZIP4 to populate eLOT fields in your database. The eLOT number is a sequential number that indicates the order in which add-on codes are arranged within a given carrier route. eLOT information is used to qualify mailings for carrier route sortation discounts.

Prior to the new installation process, the eLOT database was only installed if you were a licensed PER/SORT client. We have isolated the eLOT database so that it can be installed without having to install the entire PER/SORT Postal presorting application.

Occupancy Database

The optional PER/ZIP4 component Occupancy database should be selected if you would like to use PER/ZIP4 to populate occupancy fields in your database. The Occupancy database is provided by the USPS as part of the Delivery Point Validation (DPV) data set. This database allows PER/ZIP4 to return a one character field indicating the occupancy status of any address with a DPV confirmation indicator of “Y”. The occupancy status will be represented by one of the following values:

- Blank = If the address DPV confirms, it is presumed to be occupied
- N = Nostats (mail delivery to this address has not started)
- V = Vacant (this address is currently vacant)

Prior to the new installation process, the Occupancy database was not available. This is a new feature for PER/ZIP4.

SUITE-Link Database

The optional PER/ZIP4 component SUITE-Link database should be selected if you would like for PER/ZIP4 to standardize and validate secondary address information for businesses located in multi-tenant office buildings. This is PER/SLK.

Prior to the new installation process, the SUITE-Link database was (optionally) installed from the green CD-ROM as PER/SLK. If you were not installing and using PER/SLK, there is no need to select and install the SUITE-Link database.

PER/SORT - Postal Presorting

The base PER/SORT Postal presorting application is the same PER/SORT that was previously supplied on CD-ROM to PER/SORT licensees. If you are not a licensee of PER/SORT, there is no need to install PER/SORT. If you are a PER/SORT licensee, select this component for installation and PER/SORT will be installed at the same time as PER/ZIP4.

Once you identify the product(s) you wish to install and the environment to which they should be installed (*TEST* or *PRODUCTION*), press ENTER and the following screen will be displayed:

```

                                PER/MAIL - PRODUCT MANAGEMENT
                                System:  S10FDE81

P.E.R.  -----
        / SSSSSS  OOOOOO  FFFFFFF  TTTTTTTTTWWW  WW  AAAA  RRRRRR  EEEEE  /
        / SSSSSS  OOOOOO  FFFFFFF  TTTTTTTTTWWW  WW  AA  AA  RR  RR  EEEEE  /
        / SS      OO  OO  FF          TT  WW  WW  AA  AA  RR  RR  EE      /
        / SSSSSS  OO  OO  FFFF        TT  WW  WW  AAAAAA  RRRRR  EEEEE  /
        / SSSSSS  OO  OO  FFFF        TT  WW  W  WW  AAAAAA  RRRR  EEEEE  /
        /  SS      OO  OO  FF          TT  WW  W  WW  AA  AA  RR  RR  EE      /
        / SSSSSS  OOOOOO  FF          TT  WW  W  WW  AA  AA  RR  RR  EEEEE  /
        / SSSSSS  OOOOOO  FF          TT  WWW  WWW  AA  AA  RR  RR  EEEEE  /
        -----
                                                INC.

PER/ZIP4 is being installed.

```

The screen above will be displayed while PER/ZIP4 and the selected optional components are being installed. The message at the bottom of the screen will change as the installation process progresses.

When the installation process is complete the following screen will be displayed:

```
PER/MAIL - PRODUCT MANAGEMENT                               System:  S10FDE81

P.E.R.  -----
/ SSSSSS  000000  FFFFFFF  TTTTTTTTWWW  WW  AAAA  RRRRRR  EEEEEEE /
/ SSSSSS  000000  FFFFFFF  TTTTTTTTWWW  WW  AA  AA  RR  RR  EEEEEEE /
/ SS      00  00  FF      TT  WW  WW  AA  AA  RR  RR  EE      /
/ SSSSSS  00  00  FFFF      TT  WW  WW  AAAAAA  RRRRR  EEEE  /
/ SSSSSS  00  00  FFFF      TT  WW  W  WW  AAAAAA  RRRR  EEEE  /
/  SS      00  00  FF      TT  WW  W  WW  AA  AA  RR  RR  EE      /
/ SSSSSS  000000  FF      TT  WW  W  WW  AA  AA  RR  RR  EEEEEEE /
/ SSSSSS  000000  FF      TT  WWW  WWW  AA  AA  RR  RR  EEEEEEE /
-----
INC.
```

Software installation/deletion complete. Press Enter to continue.

Press the ENTER key to return to the command line from which you executed the **LODRUN** command.

Frequently Asked Questions

Q: *I use Virtual Optical to install my PER/ZIP4 updates. Will the new CDs work with Virtual Optical?*

A: Yes. The new CDs can be loaded into an Image Catalog just like the old CDs were loaded into an Image Catalog.

Q: *I was not prompted to install the PER/ZIP4 database. Is there a separate step for this?*

A: The PER/ZIP4 database is installed with the PER/ZIP4 Base Postal Coding selection. There is no longer a separate step for installing the PER/ZIP4 database.

Q: *Can I still load only certain states or am I required to load the entire database?*

A: PER/ZIP4 no longer offers the option of installing only certain states. Databases used by the newer required components PER/DPV and PER/LLK are not available by state and cannot be broken apart by state. For consistency and to provide the best possible results, the entire National +4 database is loaded as well.

Q: *I have installed my PER/ZIP4 update to the TEST environment. Now I can't install it to the PRODUCTION environment. Why?*

A: A PER/ZIP4 update can only exist in one environment (*TEST*, *PRODUCTION*, or *PREVIOUS*). If you've installed the update to the *TEST* environment you can promote it to the *PRODUCTION* environment using the following command:

MLLIBR/PERSETVER *TEST

Q: *How do I revert back to the PREVIOUS version of PER/ZIP4?*

A: You can revert back to the *PREVIOUS* version of PER/ZIP4 by using the following command: **MLLIBR/PERSETVER *PREV**

Q: *What happens if I execute the PERSETVER command while users are actively using PER/ZIP4?*

A: The **PERSETVER** command has no immediate effect on active users. Each user will begin using the newly established *PRODUCTION* version only after exiting and returning to the PER/ZIP4 application.

Q: *How can I research an address using the PREVIOUS version of PER/ZIP4 without reverting back to the PREVIOUS version of PER/ZIP4?*

A: You can access the *PREVIOUS* version's PER/ZIP4 Main Menu using the following command: **STRPERZIP4 *PREV**

From the *PREVIOUS* version's PER/ZIP4 Main Menu you can use option 3 to research an address. The PER/ZIP4 Main Menu will indicate that you are using the *PREVIOUS* version. Using this technique, only you are accessing the *PREVIOUS* version. All of your users will continue using the *PRODUCTION* version of PER/ZIP4.

Q: *How can I research an address using the TEST version of PER/ZIP4?*

A: You can access the *TEST* version's PER/ZIP4 Main Menu using the following command: **STRPERZIP4 *TEST**

From the *TEST* version's PER/ZIP4 Main Menu you can use option 3 to research an address. The PER/ZIP4 Main Menu will indicate that you are using the *TEST* version. Using this technique, only you are accessing the *TEST* version. All of your users will continue using the *PRODUCTION* version of PER/ZIP4.

Q: *Can I remove optional components after installing them?*

A: Yes. Optional components can be deleted (or installed) using either of two methods. The first method would be to load the new CD (Volume 1) and execute the **LODRUN** command. When presented with the list of components you can select the desired components with a "4" to delete them.

The second method would be to go to the PER/ZIP4 Main Menu and select option 5 for Product Management. This option presents the same list of components that you see during the installation process. Simply select the optional components you wish to delete with a "4" and press ENTER. FYI, if you use this method to install new components, you must have the new CD (Volume 1) loaded in your optical device.

Q: *I license the Residential Delivery Indicator (RDI) data from the USPS. Has the process changed for loading the RDI data?*

A: No. The RDI data is still loaded by going to the PER/ZIP4 Main Menu and typing in the command: **PERLODRDI**. This process has not changed.