QAD Enterprise Applications
Enterprise Editions

Installation Guide

Reports and Browses Bundle

Installation Introduction
Installation

78-0954-1.3
Manufacturing and Supply Chain Reports and Browses Bundle Version 1.1, 1.2
Customer Management Reports and Browses Bundle Version 1.1, 1.2, 1.3
QAD Enterprise Edition 2011, 2011.1, 2012, 2012.1
September 2012

This document contains proprietary information that is protected by copyright and other intellectual property laws. No part of this document may be reproduced, translated, or modified without the prior written consent of QAD Inc. The information contained in this document is subject to change without notice.

QAD Inc. provides this material as is and makes no warranty of any kind, expressed or implied, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose. QAD Inc. shall not be liable for errors contained herein or for incidental or consequential damages (including lost profits) in connection with the furnishing, performance, or use of this material whether based on warranty, contract, or other legal theory.

QAD and MFG/PRO are registered trademarks of QAD Inc. The QAD logo is a trademark of QAD Inc.

Designations used by other companies to distinguish their products are often claimed as trademarks. In this document, the product names appear in initial capital or all capital letters. Contact the appropriate companies for more information regarding trademarks and registration.

Copyright © 2012 by QAD Inc.

ReportsAndBrowsesBundle_IG_v103/mat/c6s

QAD Inc.
100 Innovation Place
Santa Barbara, California 93108
Phone (805) 566-6000
http://www.qad.com

Contents

Chapter 1 Installation Introduction 1

Overview 2
Prerequisites 2
Installation Package 2
Before You Begin 2

Chapter 2 Installation 3

Overview 4
Install the Bundle in a Character Environment 4
Install the Bundle in a Graphical Environment 5
Post-installation Task 5
For Manufacturing and Supply Chain Reporting Bundle version 1.2 . . . 5
For Customer Management Reporting Bundle version 1.3 6

Chapter 1

Installation Introduction

This chapter discusses the following configuration information:

Overview 2
Describes the chapter contents.

Prerequisites 2
Describes system and software prerequisites that must be met before you install the workbench updates.

Installation Package 2
Describes the contents of the installation package.

Before You Begin 2
Describes tasks that you should perform before you begin installation.

Overview

This document provides instructions for installing Reports and Browses Bundle.

Prerequisites

- One of the following installed versions of QAD Enterprise Applications:
  - Enterprise Edition (EE): 2011
  - Enterprise Edition (EE): 2011.1
  - Enterprise Edition (EE): 2012
  - Enterprise Edition (EE): 2012.1
- Java Runtime Environment (JRE) 1.6 or above

Important Please be aware that even if you meet the prerequisites listed in this section, the installation package does contain modifications to existing QAD ERP programs. Consequently, if your company has applied QAD patches or customizations, for example, to any of the modified programs, it is your company's responsibility to merge the QAD patch changes, customizations, and any other changes once this installation package has been applied. QAD does not support customized programs.

Installation Package

The installation package contains the following:

- Install Guide (this document) and Release Notes, located at the top level of the installation directory on the product CD
- Generic module installer
- Reports and Browses Bundle Package

Before You Begin

Before installing the package, you should back up your databases and supporting environments.

Chapter 2

Installation

This chapter discusses the following configuration information:

Overview 4
Provides an overview of the installation process.

Install the Bundle in a Character Environment 4
Provides step-by step instructions to install the Reports and Browses Bundle in a character environment on UNIX.

Install the Bundle in a Graphical Environment 5
Provides step-by step instructions to install the Reports and Browses Bundle in a graphical environment on UNIX or Windows.

Post-installation Task 5
For some specific reports, there are some additional steps to follow after you finish the normal bundle installation steps.

Overview

After you unzip the contents of the package, you are ready to follow normal package installation instructions. Specifically, you can choose one of the following:

- Install the Bundle in a Character Environment
- Install the Bundle in a Graphical Environment

Important Please be aware that even if you meet the prerequisites listed in Chapter 1, the installation package does contain modifications to existing QAD ERP programs. Consequently, if your company has applied QAD patches or customizations, for example, to any of the modified programs, it is your company's responsibility to merge the QAD patch changes, customizations, and any other changes once this installation package has been applied. QAD does not support customized programs.

Install the Bundle in a Character Environment

1. Log in as an administrative user with read, write, and execute permissions for your production environment. On UNIX systems, this is typically `mfg`.
2. Make sure that you have JRE 1.6 or above installed, and make sure it is the first JRE located on the environment variable *`PATH`*.
3. Make sure that the *`JAVA_HOME`* variable is exported correctly.
4. Mount the Reports and Browses Bundle installation media.
5. Change to the installation's install directory by typing `cd` *`InstallDir`*.
6. Launch the installation script for UNIX by typing `./install.sh`.

   The welcome screen displays, showing you the command tips for the installation and the product you are installing. You can press Enter to skip the welcome page.
7. Enter the location where the QAD Deployment Toolkit (QDT) is installed.
8. Select a QAD environment as the installation target.
9. Select a typical or custom installation:
   - `Typical`. Choose this option to use the installation parameters loaded from the QAD environment that you selected.
   - `Custom`. Choose this option when you want to view or edit the installation parameters.
10. Review the summary screen and enter `b` if you want to re-enter installation information.
11. Press Enter to start the installation.

Note If an error occurs during the installation, refer to the *`$TMP`*`/installation.[user].log` file for detailed error information, where *`$TMP`* is determined by the Java system property *`java.io.tmpdir`*; for UNIX, *`$TMP`* is `/tmp`.

Install the Bundle in a Graphical Environment

1. Log in as an administrative user with read, write, and execute permissions for your production environment.
2. Make sure that you have JRE 1.6 or above installed, and make sure it is the first JRE located on the environment variable *PATH*.
3. Make sure that the *JAVA_HOME* variable is exported correctly.
4. Mount the Reports and Browses Bundle installation media.
5. Change to the installation's install directory.
6. Choose one of the following:
   - For UNIX, type `./install.sh -i swing`
   - For Windows, run `install.exe`.

   The welcome screen displays, showing you the product you are installing. You can press Enter to skip the welcome page.
7. Accept or update the following information:
   - `Environment source`. Choose the location where the QAD Deployment Toolkit (QDT) is installed.
   - `Environment`. Choose a QAD environment as the installation target.
8. Select a typical or custom installation:
   - `Typical`. Choose this option to use the installation parameters loaded from the QAD environment that you selected.
   - `Custom`. Choose this option when you want to view or edit the installation parameters.
9. Review the summary screen and click the Previous button if you want to modify installation information.
10. Click the Install button to start the installation.

Note If an error occurs during the installation, refer to the *$TMP*`/installation.[`*user*`].log` file for detailed error information, where *$TMP* is determined by the Java system property *java.io.tmpdir*; for Windows, *$TMP* is `C:\DOCUME~1\[`*user*`]\LOCALS~1\Temp\`.

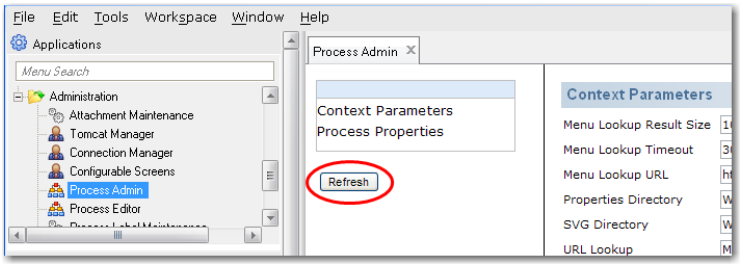
Post-installation Task

For Manufacturing and Supply Chain Reporting Bundle version 1.2

Important This section applies to the Manufacturing and Supply Chain Reporting Bundle version 1.2 only.

Version 1.2 of the Manufacturing and Supply Chain Reporting Bundle includes updated process maps. Follow these steps to make the latest maps available:

1. Launch a QAD .NET UI session.
2. Access Administration|Process Admin.
3. Click Refresh on the left side of the screen to load the changes.



For Customer Management Reporting Bundle version 1.3

Important This section applies to the Customer Management Reporting Bundle version 1.3 only.

Two reports in the bundle—Retrobill Report and Renewal Process/Report—only work with 2012 EE and 2012.1 EE. For these two reports to work, after you finish the normal bundle installation steps, continue with the steps described in the “Setting Up QAD Reporting Framework Service” section of *User Guide: QAD Reporting Framework*.