QAD

QAD Enterprise Applications
Standard and Enterprise Editions

Installation Guide
QAD Kanban Sizing Workbenches

Installation Introduction
Installation

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

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Installation Introduction

This chapter discusses the following configuration information:

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Overview

This document provides instructions for installing the Kanban Sizing Workbenches (Kanban Sizing Workbench and Kanban Process Workbench) version 1.2.0, a patch bundle release for QAD Enterprise Edition (EE) 2010, 2010.1, and 2011 and QAD Standard Edition (SE) 2010 and 2011.

Prerequisites

- One of the following installed versions of QAD Enterprise Applications:
  - Enterprise Edition (EE): 2010, 2010.1, or 2011
  - Standard Edition (SE): 2010 or 2011
- .NET UI 2.9.0 and above
- Progress databases

  Note   Oracle databases are not supported at this time.

- Minimum Progress versions to run the workbenches:
  - OE10.1C04
  - OE10.2A02
  - OE10.2B

  Note   These Progress versions are required because they contain the Cancel All Requests fix. For more information, see QAD Knowledgebase entry qad83788.

- Active QAD license for the Lean Manufacturing module

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

There are two packages provided for the workbenches 1.2.0 patch bundle for:
- Encrypted 4GL
- Unencrypted 4GL

Your individual installation package depends upon the type of QAD EE or SE source code license you have. Each 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
- Client-side artifacts:
  - Workbench .NET UI plug-in and Performance Fix plug-in
- Server-side artifacts for Kanban:
  - 4GL Code

- MFG/UTIL support files (for SE versions)
- System data
- System data load script (for EE versions)

Before You Begin

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

Installation

This chapter discusses the following configuration information:

Overview   6
Provides an overview of the patch bundle installation process.

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Provides step-by step instructions to install server-side components, including Kanban Workbenches (KB WB) related server-side artifacts, with different procedures for SE and EE versions. Tasks include loading system data and compiling 4GL code.

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Provides step-by step instructions to install client-side components, including KB WB plug-in for .NET UI.

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Describes how to periodically refresh test databases from the production database.

Overview

This section provides instructions to install the Kanban Sizing Workbenches patch bundle, version 1.2.0 for QAD Standard Edition 2010 and 2011 and QAD Enterprise Edition 2010, 2010.1, and 2011.

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

- Install the server-side artifacts
- Install the client-side artifacts

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 Server-Side Artifacts

Installation of the server-side components is very similar to installing a QAD service pack. The server-side installation consists of these steps:

- Load data from the installation image to a suitable location.
- Install Kanban Workbenches update for QAD Standard Edition.

    OR

- Install Kanban Workbenches update for QAD Enterprise Edition.

The following topics discuss each major step.

Load Data from the Installation Image

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 Mount the Kanban WB installation media.

3 Change to the installation's install directory by typing `cd InstallDir/install`.

4 Choose one of the following:

- For UNIX, launch the installation script in that directory by typing `./install.ksh`.
- For Windows, run `install.exe`.
    - From the Start menu, select Run, then enter the `install.exe` file.

The welcome screen displays, showing you the product you are installing and the platform.

5 Press Enter to start the install.

The license agreement displays. Press CTRL-C to skip reading the agreement, or page down through the agreement. The system prompts you to accept the agreement.

6   Enter Y to accept the license agreement.

7   Select the location for the update installation log.

8   Accept or update the following information when prompted:

- Progress installation directory
- Destination directory to install the Kanban WB (*KanbanWBInstallDir*). This can be either inside or outside of the original QAD installation directory (*QADInstallDir*).
- The version of QAD Enterprise Applications that you are using. It must be one of the following:
  - 2010SE
  - 2011SE
  - 2010EE
  - 2010.1EE
  - 2011EE

9   Review the summary screen and enter Y to copy the update files or enter N to re-enter installation information.

The copy progress displays in the command window and is recorded in the file `kanbanWB.log` in your log directory.

Install Kanban Workbenches Update for SE Versions

Important   This topic applies only to QAD 2010 SE and 2011 SE. If you have Enterprise Edition, skip to "Install Kanban Workbenches Update for EE Versions" on page 9.

MFG/UTIL is used in the following steps.

Note   If you use the Enhanced Controls module, refer to the QAD SE Update Installation Instructions document for information on unprocessed Enhanced Control records prior to installing the workbenches. This is because MFG/UTIL requires that certain Enhanced Controls records in the database be processed. The link below displays the QAD SE Update Installation Instructions document for 2008SE.

http://www.qad.com/Documents/qad_se/2008/updates/EnterpriseApplications_IG_v2008SE.pdf

1   Copy these files in *KanbanWBInstallDir*/kanbanWB/ to *QADInstallDir*:
- `version.kanbanWB`
- `wkkanbanWB.ini`

2   Launch MFG/UTIL.

3   Select `QAD ERP Guided Setup` from the Configure menu.

4   Select `Install Kanban Sizing Workbenches` in the Operation Set drop-down list.

This workflow executes the following steps. For each step it may be necessary to enter data, such as a database, directory, or file name. These are indicated for each step where required.

a   Load database data:
- In the Domain textbox, enter a domain identifier that is in your production database.

- In the Data Directory textbox, enter *KanbanWBInstallDir*/kanbanWB/data.
- In the Language Selection list, choose the language code of your system. The following lists the language codes of the languages that are supported at this time:
    - cs (Castilian Spanish)
    - cz (Czech)
    - ko (Korean)
    - ls (Latin Spanish)
    - us (US English)
    - du (Dutch)
    - fr (French)
    - ge (German)
    - it (Italian)
    - jp (Japanese)
    - pl (Polish)
    - po (Portuguese)
    - ch (Simplified Chinese)
    - tw (Traditional Chinese)
- In the database list, select your Mfg Production and Adm Production databases by using the up-and-down arrows through the entries and pressing the space bar.
- Press the Ok button.
- The process prompts you to connect to your Mfg Production and Adm Production databases, then to connect again to the Mfg Production database to finish the data installation. This last prompt may show a blank where the database path would normally be specified. Specify the path to your Mfg Production database.

b Compile the new Kanban WB 4GL .p program files using the supplied compile list file *KanbanWBInstallDir*/kanbanWB/utcompilkanbanWB.wrk.

- For this step it is necessary to include the directories *KanbanWBInstallDir*/kanbanWB/xrc and *KanbanWBInstallDir*/kanbanWB/src as the first directories in the Compile Propath textbox.

Note "Staggered QAD ERP Default" is the recommended value for R-code Destination when compiling code, even if the R-code will be placed in a separate directory other than *QADInstallDir*. With this option, the R-code will be compiled and organized in a directory structure.

Note The compiled code will be placed in *QADInstallDir* by default. Depending on your installation requirements, you may want to place the compiled code into a different target directory. If you do so, you need to add the Destination Directory to the AppServer's PROPATH *before* the standard MFG/PRO compiled code directories

Install Kanban Workbenches Update for EE Versions

Important   This topic applies only to QAD 2010 EE, 2010.1 EE, and 2011 EE. If you have Standard Edition, see "Install Kanban Workbenches Update for SE Versions" on page 7.

QDT is used in the following steps.

Note   Please shut down your database server before beginning this procedure.

1   Run the script *KanbanWBInstallDir*/kanbanWB/utility/load_data.sh to load system data. In this step, only US language data is loaded. If multiple languages are used, see step 3 for additional data loading instructions. This script starts a Progress session and prompts you for the following inputs:

MFG DB Path. Specify the physical path to the mfg database.

Admin DB Path. Specify the physical path to the admin database.

Data Directory. Specify the directory for system data. By default, you should enter *KanbanWBInstallDir*/kanbanWB/data.

Commit Changes. Specify whether whether accrued changes are committed to the database.

Log File. Specify the log file for this loading step.

2   Open the QDT Admin dialog box to compile the source code.

   a   In the Product box, choose QAD EE Envs Environment -> Envs: QAD EE ->Envs: QAD EE Application->Envs: Character Client.

   b   In the Action box, choose Generate R-code.

   c   Choose <reset> if the original status is Completed, or choose Edit for more configurations. In Compile List File, enter the compile list file name: *KanbanWBInstallDir*/kanbanWB/utcompilkanbanWB.wrk.

      • For this step it is necessary to include the directories *KanbanWBInstallDir*/kanbanWB/xrc and *KanbanWBInstallDir*/kanbanWB/src as the first directories in the Compile Propath textbox.

Note   "Staggered QAD ERP Default" is the recommended value for R-code Destination when compiling code, even if the R-code will be placed in a separate directory other than *QADInstallDir*. With this option, the R-code will be compiled and organized in a directory structure.

Note   The compiled code will be placed in *QADInstallDir* by default. Depending on your installation requirements, you may want to place the compiled code into a different target directory. If you do so, you need to add the Destination Directory to the AppServer's PROPATH *before* the standard MFG/PRO compiled code directories

3   Optionally, load language data using Operational Language Data Load (36.24.6).

Language Code. Choose the language code of your system. The following languages are supported at this time:

      • cs (Castilian Spanish)

      • cz (Czech)

- ko (Korean)
- ls (Latin Spanish)
- du (Dutch)
- fr (French)
- ge (German)
- it (Italian)
- jp (Japanese)
- pl (Polish)
- po (Portuguese)
- ch (Simplified Chinese)
- tw (Traditional Chinese)

Update Mode. Select New for adding new data.

Input Directory. Enter the path to *KanbanWBInstallDir*/kanbanWB/data.

Other Fields. Only keep Load Label Master checked.

4   Optionally, apply the performance fix. If your configuration includes QAD .NET UI version 2.9.0, additional 4GL code for the .NET UI is needed. This will ensure that AppServer agents are properly released back to the "free pool" in the event that certain Kanban WB calculations are invoked.

Instructions for this fix are provided in *KanbanWBInstallDir*/kanbanWB/performancefix/readme.txt.

Note   .NET UI 2.9.1 and above versions do not require this server-side fix; however, .NET UI 2.9.1 does need a client-side fix, which is described as part of the following section.

Install Client-Side Artifacts

The following topics discuss tasks to complete when installing client-side artifacts, including:

- Install Plug-Ins

Install Plug-Ins

Use the following procedure to install the plug-ins.

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   Change to the Tomcat home server webapp packages directory by typing:

`cd TomcatInstallDir/webapps/HomeWebAppDir/packages`

3   Unzip *KanbanWBInstallDir*/client/plugins/qad.plugin.kanban-x.x.x.x.zip

Where `x.x.x.x` represents the installation package build number.

4   Ensure that the following line is in the `plugins/manifest.qpkg` file. Note that the text is case-sensitive.

```
<package path="" ref=
"${Repos}/plugins/qad.plugin.kanban/manifest.qpkg" />
```

5   Only if you are using .NET UI version 2.9.0 or 2.9.1, use the following steps to add an additional update to the UI. This will ensure that AppServer agents are properly released back to the "free pool" in the event that certain Kanban WB calculations are invoked.

Important   This update is already incorporated into .NET UI 2.9.2 and above; skip these steps if you have one of those versions.

a   Choose the suitable patch according to your AppShell version:

- `base.code-2.9.0.88.8083.zip` applies to AppShell 2.9.0.
- `base.code-2.9.1.36.6245.zip` applies to AppShell 2.9.1.

b   Unzip the selected plug-in zip file by typing:

```
unzip KanbanWBInstallDir/client/plugin/base.code-2.9.x.xx.xxxx.zip
```

c   Edit the plug-in manifest file by typing:

```
vi plugins/manifest.qpkg
```

d   Add the following line to the list of <package> elements:

```
<package path="" ref="${Repos}/plugins/base.code/patch/UIG-
6245/manifest.qpkg" />
```

Updating Test Databases

Periodically you may need to refresh your test databases from the databases in your production environment.

To do this, follow the instructions for your version:

- Step 4 under "Install Kanban Workbenches Update for SE Versions" on page 7.
- Steps 1 and 3 under "Install Kanban Workbenches Update for EE Versions" on page 9.