

# 2017.1 Financials Patch Installation: QAD Enterprise Applications 2015-2009.1 Enterprise Edition

**November 2017**

**Note** This document is accurate as of November 13, 2017. To ensure you have the latest version, visit the QAD Document Library at [documentlibrary.qad.com](http://documentlibrary.qad.com).

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## Overview

Enterprise Financials is a module that is available for Enterprise Edition. Support for Enterprise Financials is delivered using patches. Enterprise Financials uses a build mechanism, and patches are complete new versions of the Enterprise Financials executables. Enterprise Financials versions have a year component, similar to Enterprise Edition Core.

This document provides the steps required to apply an Enterprise Financials patch to an existing QAD 2015-2009.1 Enterprise Edition installation.

## Prerequisites

Verify that X terminal is installed. It is required for QAD Enterprise Edition Linux and UNIX installations.

## Back Up the Existing System

Back up the following folders, files, and databases for all of the environments that you plan to update:

- `<QAD_EE_install_directory>/qra`
- `<QAD_EE_install_directory>/fin`
- `<QAD_EE_install_directory>/xrc/proxy`
- `<QAD_EE_install_directory>/qadui`
- `<QDT_install_directory>/xml`
- Progress backup of all production databases
- `<QADHOME_directory>`

Previously installed hot fixes can interfere with the installation of this patch. Ensure that the following folders are backed up and their contents are deleted:

- `<QAD_EE_install_directory>/fin/patch`
- `<QAD_EE_install_directory>/fin/proxypatch`

## Factory Defaults

The QAD Enterprise Financials patch overwrites any changes you have made to the factory defaults. If you want to keep your changes, back them up.

To save your current storage search and report variant settings, run the Stored Search Export Initial Settings and Report Variant Export Initial Settings programs from the QAD .NET UI.

The programs generate two files, `factorydefaults.xml` and `reportvariantfactorydefaults.xml`, and save them in `<QAD_EE_install_directory>/fin`. Back up these files by saving them in a different location.

## Shut Down Databases and Servers

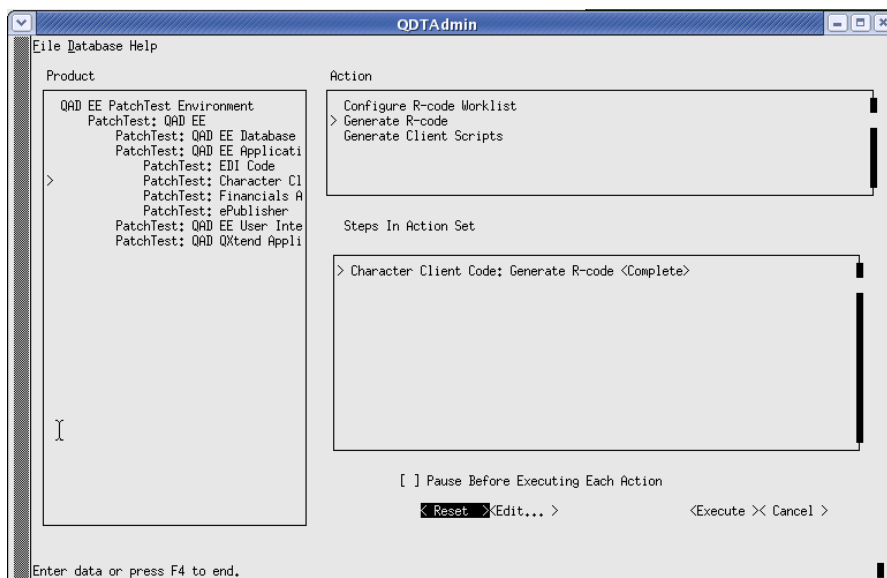
Shut down all QAD Enterprise Edition databases and servers:

- 1 Stop Tomcat by using the appropriate shutdown script in `<Tomcat_install_directory>/bin`.
- 2 Stop any add-ons that are integrated into your QAD Enterprise Edition environment.
- 3 Stop all QAD Enterprise Edition servers and databases by using the `stopenv` script located in `<QDT_install_directory>/envs/<environment_names>/scripts`.

## Apply the Patch

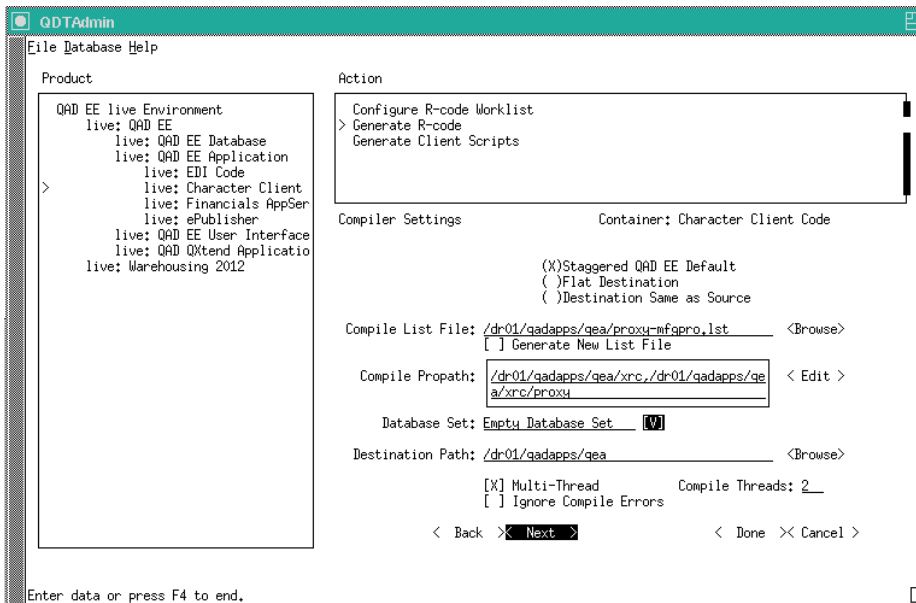
- 1 Download and extract the patch bundle (zip file) to the system being patched (qad2017ee\_patch<patch\_number>.zip). The files are extracted into a subdirectory named patch<technical\_version\_number>.
- 2 From the patch<technical\_version\_number>/install directory, run instpatch.ksh for Linux/UNIX operating systems or instpatch.exe for Windows.
- 3 Read and accept the license agreement.
- 4 Enter the following locations for the patch installer to apply the patch to your system:
  - Enter the QAD EE Financials patch install location as the full path to the existing EE installation directory.
  - Enter the patch install log files directory. This directory is not necessarily the QDT/logs directory. It can be any directory, but the directory must exist because the installer does not create it.
  - Enter the location of the Progress installation associated with the EE installation.
  - Enter the fully qualified location and name of the qadhome WebApp under the Tomcat directory (for example, /dr01/tomcat/webapps/qadhome). Where the name was modified from qadhome, enter the modified name associated with the environment being updated.
- 5 A summary of the entered values displays. If all of the information is correct, press <Enter> or type y to continue with the install.
- 6 The files are copied to the specified locations and a summary of the installation actions displays on the screen. Review the log files that were written to the directory specified in step 4 to ensure that there were no errors.
- 7 If you have multiple instances of QAD Enterprise Edition installed with a single QDT, repeat steps 2 through 6 for each instance. Since they all use the same qadhome WebApp in Tomcat, you must patch them at the same time. Then start QDT and launch QDTAdmin by clicking the Admin button.
- 8 Navigate to the Character Client | Generate R-code actions set and select Reset. This action enables QDTAdmin to recompile programs. Select yes when prompted and close the output screen to continue.

**Fig. 1**  
Enabling QDTAdmin to Recompile Programs



- 9 After you run the reset action, select Edit.
- 10 In the Compile List File field, enter the name of the compile list that the installer extracted. You can find this file in `<QAD_EE_install_directory>/proxy-mfgpro.lst`. Select Done when finished.
- 11 Once you modify the Character Client | Generate R-code actions set with the new compile list, select Execute to start the compile.
- 12 Select Yes when prompted, and choose whether to clear the log to continue.

**Fig. 2**  
Preparing to Compile



- 13 When the compile finishes, check the log files for errors as indicated in the QDTAdmin log window. A log file is created for each compile thread specified; the files are named `xxbatchCompile.log` and they are located in `<QDT_install_directory>/logs` by default.
- 14 Select Close to continue.
- 15 If you have multiple instances of QAD Enterprise Edition built with this instance of QDT, repeat steps 8 through 14 for each instance. Then exit from QDTAdmin and QDT to conclude the server portion of the patch install.
- 16 If you backed up your factory default settings, stop the application servers before you attempt to restore them. If you did not back up your factory default settings, start up all QAD Enterprise Edition databases and servers.
- 17 If you backed up your factory default settings, restore them by placing the `factorydefaults.xml` and `reportvariantfactorydefaults.xml` files into `<QAD_EE_install_directory>/fin`. By doing so, you lose the latest factory default settings in the QAD patch.
- 18 Start up all QAD Enterprise Edition databases and servers:
  - a Run the `startenv` script or scripts located in:  
`<QDT_install_directory>/envs/<environment_name(s)>/scripts`.
  - b Start up other add-ons as needed.
  - c Start Tomcat using the appropriate script in `<Tomcat_install_directory>/bin`.

- 19 Once the QAD Enterprise Edition environment starts, run System Synchronize to ensure that all components are updated. You can run the synchronization through QDT or the QAD .NET UI as a user with administrative privileges.
- 20 Upon launching the QAD .NET UI client, the system prompts you to update any plug-ins that have changed. Accept all prompts.

## Import Templates and Reports

Import the updated reports. This process has the following parts:

- Importing the templates
- Importing the reports

To enable a user to run the Report Resource Import Menu item, assign the user the rptAdmin role.

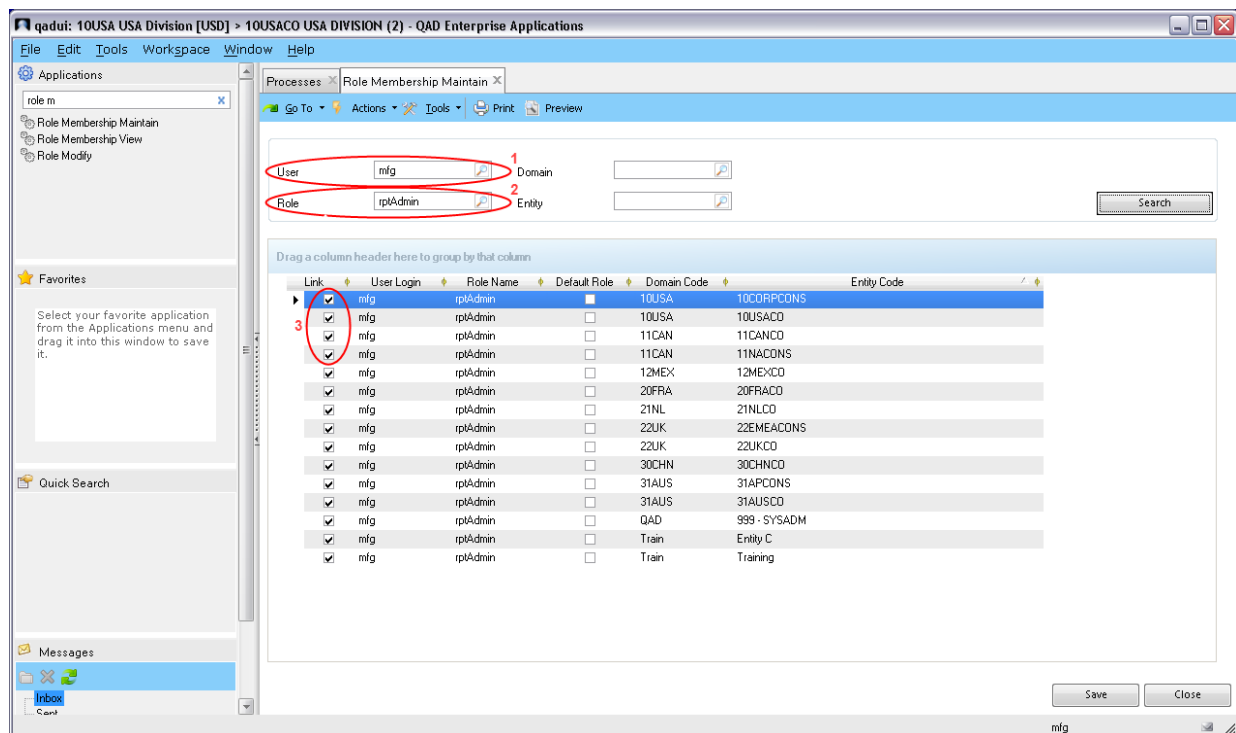
### Creating a rptAdmin Role

If you previously assigned the rptAdmin role to a user for a certain domain and entity, you can use that user to import the report resources included with the patch. If such a user exists, skip ahead to “Importing the Templates” on page 6.

To import the reports, do the following:

- 1 Use the QAD .NET UI to log in to QAD Enterprise Edition.
- 2 Open Role Membership Maintain.

**Fig. 3**  
Role Membership Maintain



- 3 Enter the user login in the User field (Figure 3, item 1).
- 4 Enter rptAdmin in the Role field (Figure 3, item 2).

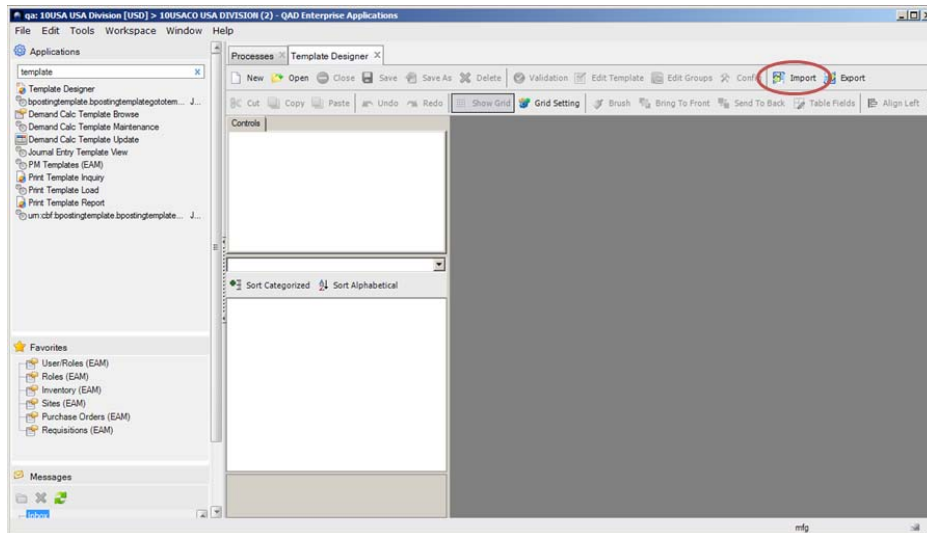
- 5 Click Search.
- 6 Select the Link check box for each user, domain, and entity combination that needs to run the operation. Usually, only one is necessary. The operation is universal; one user only has to do it once (Figure 3, item 3).
- 7 Click Save, then click Close.
- 8 Log out of the QAD .NET UI and log in again to make the role changes take effect.

## Importing the Templates

To import the templates, follow these steps:

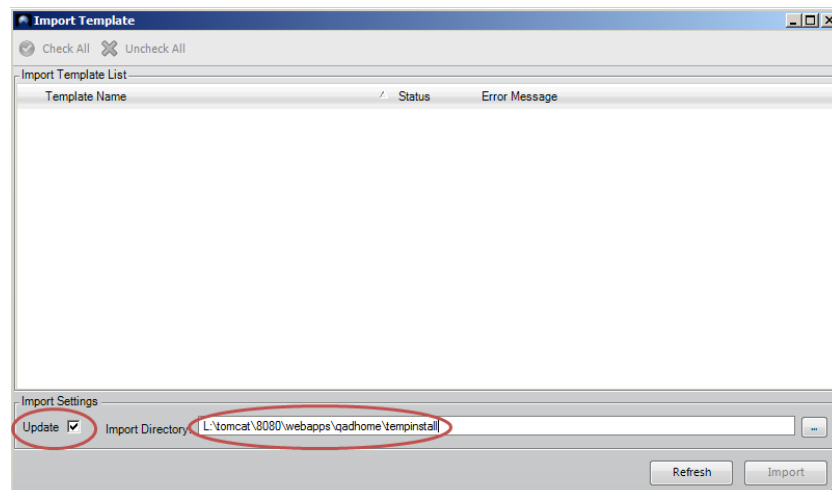
- 1 Use the QAD .NET UI to log in to QAD Enterprise Edition.
- 2 Open the Template Designer menu.

**Fig. 4**  
Template Designer



- 3 Click the IMPORT button in the upper right of the menu screen.

**Fig. 5**  
Import Template



- 4 Select the Update check box to update the existing templates. (Figure 5)
- 5 Enter the directory where the report XML was copied during the patch install. This directory is <Tomcat\_directory>/webapps/qadhome/repinstall. (Figure 5)

If QDT and QAD Enterprise Edition are installed on a Linux/UNIX system, the drive referenced in the previous figure is not a local drive on the machine running the QAD .NET UI client. For a successful import, mount the Tomcat directory containing the copied patch installation files to the Windows system as a network drive. If you cannot mount the Tomcat directory as a network drive, copy the files locally to your QAD .NET UI machine. Enter the appropriate network drive or local drive containing the templates to load.

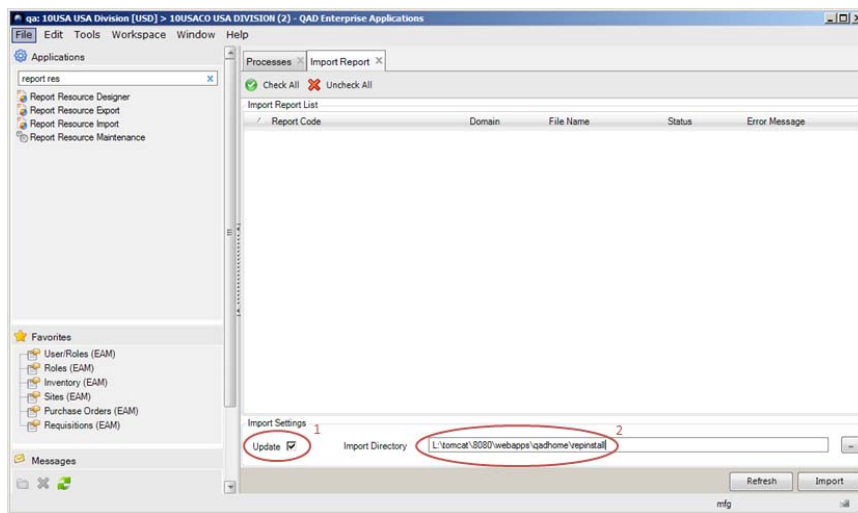
- 6 Click the Refresh button to refresh the display and show the templates to be imported.
- 7 Once the templates are imported, close the menu to continue with the report import.

## Importing the Reports

To import the reports, follow these steps:

- 1 Use the QAD .NET UI to log in to QAD Enterprise Edition as the rptAdmin user.
- 2 Open the Report Resource Import menu item.

**Fig. 6**  
Import Report

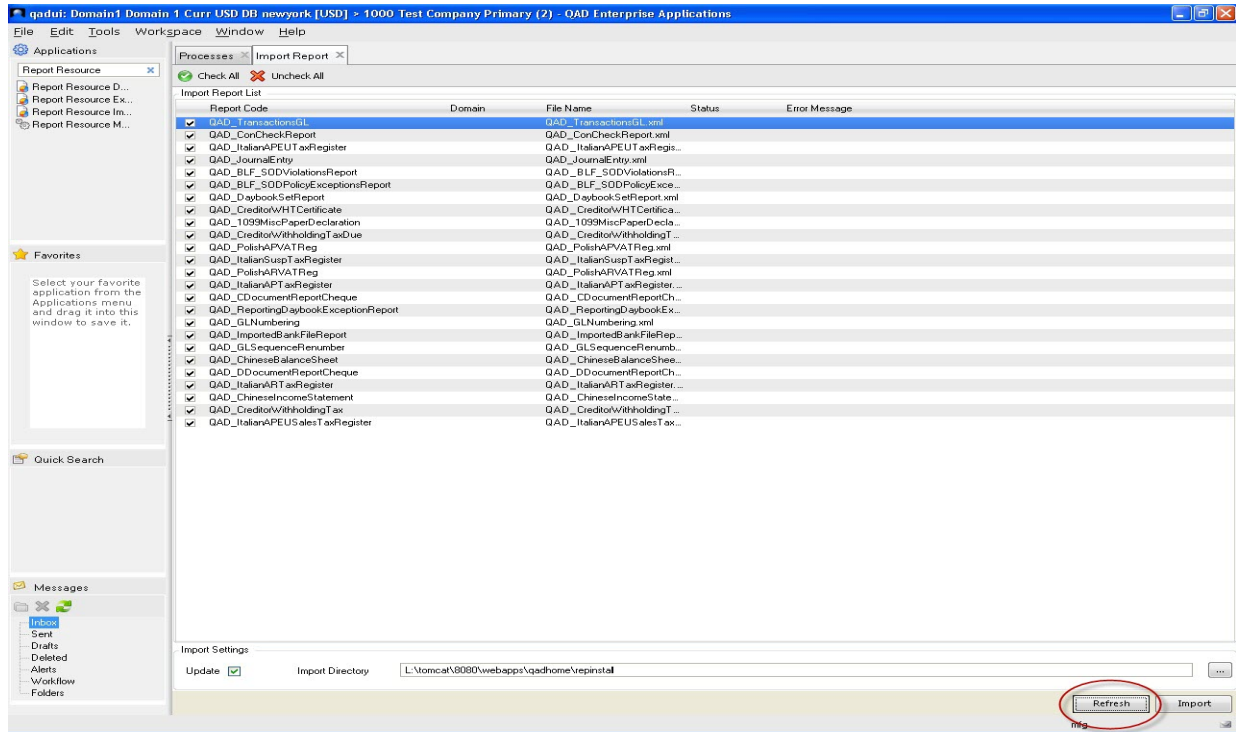


- 3 Select the Update check box to update the existing reports (Figure 6, item 1).
- 4 Enter the directory where the report XML was copied during the patch install. This directory is <Tomcat\_directory>/webapps/qadhome/repinstall (Figure 6, item 2).

If QDT and QAD Enterprise Edition are installed on a Linux/UNIX system, the drive referenced in Figure 6, item 2 is not a local drive on the machine running QAD .NET UI. For a successful import, mount the Tomcat directory containing the copied patch installation files to the Windows system as a network drive. The reference in the Input Directory field (Figure 6, item 2 and the circled area in Figure 7) points to the network-mounted drive. This reference allows for the import of files from the Linux/UNIX system. If you cannot mount the Tomcat directory as a network drive, copy the files locally to your QAD .NET UI machine. Enter the appropriate network drive or local drive containing the templates to load.

- 5 Click the Refresh button to refresh the display and show the reports.

**Fig. 7**  
Import Report: Reports List



- 6 Select the reports that you want to import. The default is all.
- 7 Click the Import button to import the reports.
- 8 Log out of Enterprise Edition.

## Apply Non-intrusive Customization Code

Apply the non-intrusive customization code to the new customization templates that were shipped with the patch. Then recompile the code.