

Enterprise Edition 2016-2017 Backward Compatibility Upgrade: QAD Enterprise Financials 2018

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Note This document is accurate as of September 2018. To ensure you have the latest version, check the QAD Document Library at documentlibrary.qad.com.

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Overview

This document provides the steps required to upgrade QAD Enterprise Financials to a later QAD Enterprise Financials release, also known as a Financials Backward Compatibility installation. Backward Compatibility refers to the upgrade of a module to a higher module release without upgrading the rest of the Enterprise Edition core release. For example, Enterprise Financials can be upgraded independently from Enterprise Edition Core. This capability allows you to implement Enterprise Financials 2018 on an existing Enterprise Edition implementation.

This document is only relevant for QAD Enterprise Edition environments managed by YAB, which applies to QAD Enterprise Edition 2016 and later.

The backward compatibility upgrade patch is installed using YAB. For detailed information about YAB installation prerequisites, installation, and use, see [QAD Enterprise Edition Installation Guide](#).

Prerequisites

YAB Requirements

For 2018 QAD Enterprise Financials and later, the QAD Enterprise Edition environment in which you are executing the backward compatibility upgrade must be using YAB 1.6.5 or later. To check the YAB and YAB patch versions that are installed in your environment, enter:

```
> yab info | grep yab
```

Table 1

Minimum YAB Patch Versions

YAB Version	Minimum Patch Version
YAB 1.6	yab-ee-app-1.6.5.45 or later
YAB 1.7	yab-ee-app-1.7.1.0 or later

Upgrade YAB

To upgrade YAB, download the appropriate patch version from QAD and then execute the following command:

```
>yab -install-update:false install yab-ee-image-VERSION.zip
```

You should see output similar to the following. After the patch installs successfully, proceed with the upgrade.

```
Validating OK
Initializing instance OK
Reconfiguring instance OK
Resolving and copying packages OK
Cleaning up OK
```

```
INSTALL SUCCESSFUL
```

For more information on installing a YAB patch, see the [QAD Enterprise Edition Administration and Configuration Guide](#).

Progress Requirements

Progress requires that `after-imaging` and `2phase` be disabled for the index rebuild process to complete properly. You must disable these features in your environment before you start the installation process.

Back Up the Existing System

Back up your production databases before you start the installation process. Previously installed hot fixes can interfere with this patch installation. Ensure that the following folders are backed up and their contents deleted.

- `dist/fin/patch`
- `dist/fin/proxypatch`
- `patches/fin/proxypatch`

For more information on backup procedures, see the *QAD Enterprise Edition Administration and Configuration Guide*.

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`. Save these two files in the `DefaultDataDirectory` as defined in the `server.xml` file. The default location of this directory is `QAD_EE_install_directory>/config/data`. For example:

```
<defaultdata>
  <DefaultDataDirectory> /dr01/qadapps/config/data/<DefaultDataDirectory>
</defaultdata>
```

Back up these files by saving them in a different location.

Upgrade Enterprise Financials

The upgrade process involves:

- Performing a delayed installation of the 2018 Enterprise Financials software using the `-install-update:false` flag
- Executing the `yab conversion-ee-upgrade` command
- Executing the `yab update` command

1 Download the following packages from the [QAD Store Download Center](#). Always use the latest version available for your environment.

Table 2
Required Packages

Name	Package Name	Minimum Version
2018 Financials Schema	fin	2018.0.18.665
2018 Enterprise Financials	qad-ee-fin-patch	2018.0.0.0 or later
2018 Financials Conversions	fin-conversion	2018.0.0.12 or later

2 Install the Enterprise Financials Schema package.

```
> yab -install-update:false install <download-dir>/fin-2018.0.18.665.zip
```

```
> yab -install-update:false install fin-2018.0.18.665.zip
```

```
Validating OK
Initializing instance OK
Reconfiguring instance OK
Resolving and copying packages OK
Cleaning up OK
```

```
INSTALL SUCCESSFUL
```

3 Install the Enterprise Financials package. Ensure that you do not apply the update by including `-install-update:false`, as shown in the following example.

```
> yab -install-update:false install /<download-dir>/qad-ee-fin-patch-2018.0.x.x.zip
```

```
> yab -install-update:false install qad-ee-fin-patch-2018.0.0.0.zip
```

```
Validating OK
Initializing instance OK
Reconfiguring instance OK
Resolving and copying packages OK
Cleaning up OK
```

```
INSTALL SUCCESSFUL
```

4 Install the Financials Conversions package. Ensure that you do not apply the update by including `-install-update:false`, as shown in the following example.

```
> yab -install-update:false install /<download-dir>/fin-conversion-2018.0.0.12.zip
```

```
> yab -install-update:false install fin-conversion-2018.0.0.12.zip
```

```
Validating OK
Initializing instance OK
Reconfiguring instance OK
Resolving and copying packages OK
Cleaning up OK
```

```
INSTALL SUCCESSFUL
```

5 Confirm that the package versions are correctly updated. Enter the following command:

```
> yab info -depth:0
```

```
INSTANCE
```

```
/qad/sbox/005/user/nus/04/2017ee
```

```
MODULES
```

```
| - archiving          1.0.0.78      remote
| - assistance-help-ee 2017.0.0.3    remote
| - base-api           1.1.0.79      remote
| - ee-pre-conversion-reports 1.0.0.2      remote
| - fin                2018.0.18.665 remote (new)
| - fin-apidoc         2018.0.0.1    remote (new)
| - fin-bin64-proxy    2018.0.0.1    remote (new)
| - fin-bin64-qadfin   2018.0.0.1    remote (new)
| - fin-bldata         2018.0.0.1    remote (new)
| - fin-conversion     2018.0.0.12   remote (new)
| - fin-customization  2018.0.0.1    remote (new)
| - fin-data           2018.0.0.2    local (new)
| - fin-src-proxy      2018.0.0.1    remote (new)
| - mfg                2017.0.17.536 remote
```

```
...
```

```
| - yab-ee-app         1.6.5.45      remote (new)
  | - yab-conv         1.6.2.5        remote (new)
  | - yab-core         1.6.5.17      remote (new)
    | - dde-ant        2.5.0.1        remote
    | - dde-build     2.5.5.17      remote (new)
    | - dde-core      2.5.0.4        remote
    | - dde-registry  2.5.2.1        remote (new)
    | - qpm           3.0.1.0        remote (new)
    | - yab           1.6.4.1        remote (new)
    | - yab-client    1.6.4.1        remote (new)
    | - yab-install   1.6.2.1        remote (new)
    | - yab-test      1.6.0.1        remote
  | - yab-ee-foundation 1.6.5.16      remote (new)
  | - yab-qa         1.6.5.2        remote (new)
  | - yab-qxtend     1.6.4.8        remote (new)
```

6 Execute the conversion process.

```
> yab conversion-ee-upgrade
conversion-ee-upgrade (25 tasks)
-----
1/25  conversion-stage                OK (0.085 s)
2/25  conversion-fin-package-stage     OK (4.121 s)
3/25  conversion-fin-get-db-version    OK (2.681 s)
4/25  conversion-fin-create-execution-list OK (0.368 s)
5/25  conversion-fin-special-dump-run  SKIPPED (0.006 s)
6/25  conversion-fin-qadddb-data-delete SKIPPED (0.004 s)
7/25  conversion-fin-qadadm-data-delete SKIPPED (0.007 s)
8/25  database-qadddb-structure-list   OK (0.042 s)
9/25  database-qadddb-structure-file-update OK (0.035 s)
10/25 database-qadddb-structure-update OK (0.042 s)
11/25 qxtend-stage                   SKIPPED (0.004 s)
12/25 database-qadddb-schema-update  OK (4:23 m)
13/25 database-qadddb-schema-index-rebuild OK (0.628 s)
14/25 oid-code-update              SKIPPED (0.024 s)
15/25 database-qadadm-structure-list  OK (0.073 s)
16/25 database-qadadm-structure-file-update OK (0.012 s)
17/25 database-qadadm-structure-update OK (0.037 s)
18/25 database-qadadm-schema-update  OK (13.979 s)
19/25 database-qadadm-schema-index-rebuild SKIPPED (0.004 s)
20/25 database-qadhlp-structure-list  OK (0.050 s)
21/25 database-qadhlp-structure-file-update OK (0.007 s)
22/25 database-qadhlp-structure-update OK (0.033 s)
23/25 database-qadhlp-schema-update  OK (3.036 s)
24/25 database-qadhlp-schema-index-rebuild SKIPPED (0.003 s)
25/25 conversion-fin-qadddb-run      OK (3.730 s)
-----
```

```
BUILD SUCCESSFUL (5:03 m)
```

7 Validate the conversion execution. You can monitor the conversion's progress in the build/logs/yab.log and build/logs/conversion.log files.

Once the conversion is complete, review the logs for errors.

8 Update the environment.

```
> yab update
...
289/299 metadata-customizations-update           SKIPPED (0.030 s)
290/299 metadata-fincore-translations-update     OK (0.182 s)
291/299 metadata-fincore-update                 OK (0.563 s)
292/299 metadata-mfgcoreplus-translations-update SKIPPED (0.008 s)
293/299 metadata-mfgcoreplus-update             OK (0.976 s)
294/299 metadata-gracore-translations-update     OK (0.369 s)
295/299 gra-sync                                SKIPPED (0.000 s)
296/299 ldapinstance-opendj-create              OK (0.451 s)
297/299 qxtend-application-id-update            OK (0.363 s)
298/299 help-update                             SKIPPED (0.086 s)
299/299 search-index-restart                    OK (0.455 s)
-----
```

```
BUILD SUCCESSFUL (17:33 m)
```

Ensure that the build completes with a BUILD SUCCESSFUL message. If the build fails, review the build/logs/yab.log file for errors.

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

For more information on customizations, see the *QAD Enterprise Edition Administration and Configuration Guide*.

