



QAD Enterprise Applications
Enterprise Edition

Install Guide QAD Production Orders

Introduction
Production Orders Installation

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Production Orders Install Guide Change Summary

The following table summarizes significant differences between this document and previous versions.

| Date/Version | Description | Reference |
|--|---|------------------|
| October 2018 Production Orders Version 3.0 | Rebranded for version 3.0; added support for 2016 through 2018 | -- |
| | Removed hotfix information required for earlier (2.0) version of Production Orders | page 2 |
| | Added text for <code>configuration.properties</code> file based on EE versions. | page 7 |
| | Removed steps to install SAQ and process maps and added SAQ installation as a pre-installation step. | page 6 |
| | Added information to requirements and to pre-installation procedures for Channel Islands. | page 2 page 6 |
| | Added a procedure to resolve conflicting tables when you upgrade production orders then install Channel Islands. | page 8 |
| | Added version 3.0 new fields/programs to check for verification. | page 13 |
| | Removed appendix list of Production Order files and provided a path to view the files. | page 3 |
| May 2018 Production Orders Version 2.0 | Added information about installing a hotfix package for Production Orders 2.0 | -- |
| | Added information about installing process maps | -- |
| | Added information for a hotfix package to install with Serialization, Item Attributes, and Quality Control (SAQ) 2.7.1. | -- |
| March 2018 Production Orders Version 2.0 | Rebranded for version 2.0. | -- |
| | Added new package content. | page 18 |
| | Updated prerequisites for this package. | page 2 |
| | Removed QDoc installation procedures. | page 7 |
| | Added Automation Solutions: Data Collection transaction installation information. | page 11 |
| | Added E-Signature installation information. | page 11 |
| | Updated conversion information. | page 12 |
| | Updated customizations to include TAM information. | page 12 |
| | Updated verification with new program screens. | page 13 |
| | Updated description for Customizations to include both customizations and patches. | page 12 |

| Date/Version | Description | Reference |
|--|--|-----------|
| October 2017, Production Orders Version 1.2 | Rebranded for version 1.2; updated version of the QAD Planning and Scheduling Workbenches. Added new package content | -- |
| July 2017, Production Orders Version 1.1.1 | Rebranded for version 1.1.1, changing file names and package content for version 1.1.1 | -- |
| July 2017, Production Orders Version 1.1. | Rebranded for version 1.1 | -- |
| | All file names were changed to reflect the correct versions for version 1.1 | -- |
| | Some QDoc installation procedures were removed; the single procedure remaining now reflects standard QDocs | -- |
| | Contents in Appendix were updated to reflect version 1.1 contents | -- |
| April 2017, Production Orders Version 1.0.0. Early Adopter | This is the first version of this guide. | -- |

Introduction

This chapter discusses Production Orders installation topics.

Important Production Order functionality replaces and obsoletes functions and programs in QAD ERP. Once you install Production Orders, you cannot uninstall and return the replaced/obsoleted functions and programs. For a list of functions/programs that were replaced, removed, or moved, refer to the Introduction chapter of the *QAD Production Orders User Guide*, version 3.0.

Production Orders Installation 2

Describes system and software prerequisites you must meet before installing Production Orders and the package contents.

Production Orders Requirements 2

Describes the software and environment and other requirements for Production Orders installation.

Production Orders Installation Package 3

Lists the production orders package contents.

Patches and Customized Programs 3

Introduction to handling customizations.

Production Orders Installation

This section discusses Production Orders installation requirements, the installation package, and pre-installation preparations.

Production Orders Requirements

The following sections describe the software and environment and other requirements for Production Orders installation.

Software and Environment

You must have the following software and environment to install Production Orders software:

- 2016, 2017, or 2018 Enterprise Edition
- YAB: YAB 1.6.4.9 is the minimum version required; version 1.6.5.45 is suggested.
- QAD Planning and Scheduling Workbenches, plug-in version 4.2 is included within the On-Premise Production Order package.

Note The Planning and Scheduling Workbenches package installs when you install the Production Order package; see “Production Orders Installation Procedure” on page 7.

- Serialization, Item Attributes, and Quality Control (SAQ), version 2.7.1

Production Orders version 3.0 depends on SAQ 2.7.1. Refer to your SAQ 2.7.1 installation documentation.

- QAD E-Signature

Note You must also install E-Signature seed data for use with Production Orders 3.0. Refer to “Installing E-Signature Data” on page 11.

- Enterprise Asset Management (EAM)

For customers on 2016 EE, the EAM minimum version required is 13.3. This is a prerequisite for 2016 EE Cloud customers even when they do not actively use EAM. EAM automatically installs with 2016 EE on the Cloud, and Production Orders 3.0 requires a minimum version to exist in the environment. Customers using 2017 EE already have the correct EAM version available.

On-Premise installations do not include EAM; therefore, if you previously installed EAM, you must ensure that you have version 13.3 at a minimum.

- Data Collections

To use the Data Collection transactions that optionally install with Production Orders, you must have a minimum version 2.1 or higher of the Automation Solutions: Data Collections framework installed.

- Channel Islands

A Channel Islands environment is optional with Production Orders 3.0; however, when you install Channel Islands with Production Orders 3.0, note the following:

- Channel Islands—San Miguel 2 is the minimum version for existing Channel Islands customers.
- When you install both Channel Islands—San Miguel 2 and Production Orders for the first time, you install Channel Islands—San Miguel 2 first, then install Production Orders 3.0.

- When upgrading from an earlier version of Production Orders to version 3.0, you:
 - a Install Production Orders 3.0 first.
 - b Run a Progress database tool to re-create tables that have conflicting content. See page 8.
 - c Install Channel Islands—San Miguel 2.

Unzip Utilities

QAD's Store (<https://store.qad.com>) provides product downloads as .7z format. The .7z format is used to overcome a limitation that prevents the creation of a .zip file larger than 2 GB.

To unzip .7z files, use the free 7-Zip utility. Windows, Linux, and UNIX versions of this utility are available from:

<http://www.7-zip.org>

Unzipping the compressed product file using the appropriate utility yields an uncompressed ISO.

Production Orders Installation Package

QAD provides the following Production Orders installation components:

- Installation configuration settings
- Production Orders package
- E-Signature seed data; see “Installing E-Signature Data” on page 11.
- QAD Planning and Scheduling Workbenches, version 4.2; see “Production Orders Installation Procedure” on page 7.
- Optionally installed software in the package:
 - QAD Automation Solutions: Data Collection transactions; see “Installing Data Collection Transactions for Production Orders” on page 11.

You can find a list of files in the Production Order package by looking in the directory where you installed the package:

```
$ROOT/build/catalog/packages/productionorder/3/0/0/24/qad.productionorder/
```

Patches and Customized Programs

The installation package contains modifications to the existing QAD ERP programs; therefore, if you have applied QAD patches or customizations, it is your responsibility to review, and when needed, merge the QAD patch changes, customizations, and any other changes after applying the installation package. QAD does not support customized programs.

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Production Orders Installation

This chapter describes QAD Production Orders package installation and post-installation configuration.

Production Orders Pre-Installation Tasks 6

Describes steps to perform before the actual installation.

Production Orders Installation Procedure 7

Provides step-by-step instructions for installing both Production Orders and the QAD Planning and Scheduling Workbenches using YAB.

Run Progress Program to Re-create Tables 8

Tells you how to re-create tables when you upgrade to Production Orders 3.0 from an earlier version; then install Channel Islands.

Installing Data Collection Transactions for Production Orders 11

Provides instructions for when you install Automation Solutions: Data Collection transactions with Production Orders.

Installing E-Signature Data 11

Provides instructions for when you install QAD E-Signature seed data for use with Production Orders 3.0.

Conversion 12

Provides step-by-step instructions to run a conversion program to ready database records for use with the new Production Orders functionality.

Patches and Customized Programs 12

Tells you what to do with customized programs when installing the Production Orders package.

Installation Verification 13

Provides a method to verify successful installation.

Overview

The following sections describe how to install the Production Orders package and how to configure the product after installation. You install Production Orders using YAB.

Important Production Orders functionality replaces and obsoletes functions and programs in QAD ERP. Once you install Production Orders, you cannot uninstall and return the replaced/obsoleted functions and programs. For a list of functions/programs that were replaced, removed, or moved, refer to the Introduction chapter of the *QAD Production Orders User Guide*, version 3.0.

Note When you upgrade to Production Orders 3.0 from an earlier version, then install Channel Islands, you must run a Progress program to resolve table content conflicts. See “Run Progress Program to Re-create Tables” on page 8.

Production Orders Pre-Installation Tasks

Install Serialization, Item Attributes, and Quality Control (SAQ)

You should install SAQ 2.7.1, which runs with Production Orders 3.0, before you install Production Orders. Refer to your SAQ 2.7.1 installation documentation for instructions.

Install Channel Islands with Production Orders

When you install Channel Islands with Production Orders 3.0, note the following:

- Channel Islands—San Miguel 2 is the minimum version for existing Channel Islands customers.
- When you install both Channel Islands—San Miguel 2 and Production Orders for the first time, you install Channel Islands—San Miguel 2 first, then install Production Orders 3.0.
- When upgrading from an earlier version of Production Orders to version 3.0, you:
 - a Install Production Orders 3.0 first.
 - b Run a Progress database tool to re-create tables that have conflicting content. See page 8.
 - c Install Channel Islands—San Miguel 2.

Back Up Databases

Perform these steps before the actual YAB installation:

- 1 Choose one of the following:
 - a Back up your databases and supporting environments. To back up all databases, execute the command:

```
yab database-backup
```
 - b Back up a specific database by executing the command:

```
yab database-[INSTANCE]-backup
```

Note Be sure to include the compile database (cpldb.db) in your backup.

Production Orders Installation Procedure

The following section describes the installation. Downloading the installation package depends upon your environment:

- On-Premise servers: You download the package(s) first.
- Cloud: The installation process retrieves the package from the Cloud Catalog. No extraction is necessary.

Download the Installation Package (On-Premise Servers)

The Production Orders package contains all applicable components for Production Orders, including packages for YAB.

To download the Production Orders installation package, download the add-on .zip file from the QAD Store:

For environments without Channel Islands, install:
 prodorderaddition-image-3.0.0.14.zip
 productionorder-image-3.0.0.24.zip

Installing Production Orders and the Workbenches Using YAB

YAB is a configuration management tool you can use to start, stop, reconfigure, and maintain the consistency of your Enterprise Edition environments. Your environment is defined in terms of discrete units, or packages, which you can replace and add as needed. Refer to *QAD Enterprise Edition Installation Guide* for more information about using YAB.

When you run YAB, the process installs Production Orders and the Production Orders-compliant versions of the QAD Planning and Scheduling Workbenches packages.

Follow these steps to install Production Orders using YAB:

- 1 Change to the directory where EE is installed:
`cd <directory>`
- 2 Choose one of the following:
 - a If you are an On-Premise user, go on to step 4 on page 8.
 - b If you are a Cloud user, go on to step 3 on page 7.
- 3 For Cloud, update the `configuration.properties` file:
 - a Locate the `configuration.properties` file in the `build/config` directory.
 - b Open the file.
 - c Create a reference to the Production Orders Package.
 For all EE versions, you add the following packages for both production orders and the Workbenches (MSW/PSW):

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For example, add the following section to the file:

```
#--Production Orders--#
packages.productionorder=3.0.0.24
packages.prodorderaddition=3.0.0.14 (Required only for environments without
Channel Islands.)
packages.netui-module-mswpsw=4.2.0.2
```

- 4 For On-Premise, first download the zip package from the QAD site, then perform the following steps:
 - a Update the environment with the following commands:

```
yab install /dr01/installs/productionorder-image-3.0.0.24.zip -
install-update:false

yab install /dr01/installs/prodorderaddition-image-3.0.0.14.zip -
install-update:false (Required only for environments without Channel Islands.)
```
- 5 For 2016 environments without Channel Islands, update the `process-ignore` file to skip a process:
 - a Locate the `process-ignore` file in the `/build/config/etc` directory.
 - b Open the file.
 - c Add the following references to the file:

```
metadata-productionorder-update
metadata-prodorderaddition-update
```
 - d Update the environment with the following command: `yab update`

Run Progress Program to Re-create Tables

After you install an upgrade of Production Orders to the 3.0 version, and you intend to install Channel Islands, you must first run the Progress database tool, `progdb`, to re-create the following tables that have conflicting content:

- `ln_mstr`
- `serh_hist`
- `wo_mstr`
- `ser_mstr`
- `pt_mstr`
- `ptp_det`

The procedure in this section provides step-by-step instructions to use the tool. You run the procedure from a character environment, entering commands at the command line.

- 1 Determine whether YAB allows unrecognized schema in `qaddb` by entering:

```
yab config db.qaddb.allowunrecognizedschema
```
- 2 When YAB does not allow unrecognized schema (that is; not set to true), update YAB so that YAB does not remove unrecognized schema by entering:

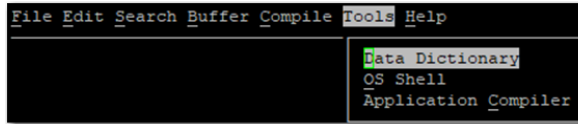
db.qaddb.allowunrecognizedschema=true

3 Stop the database environment by entering: `yab stop`

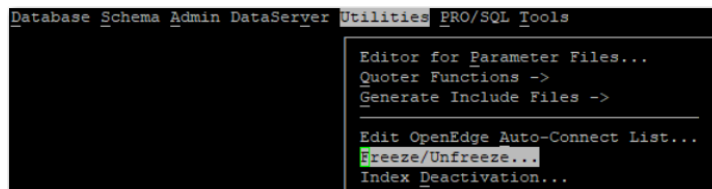
4 Rename the tables:

a Path to the database directory; then enter: `pro mfgdb.db` (or `qaddb.db`).

b Select Tools | Data Dictionary:

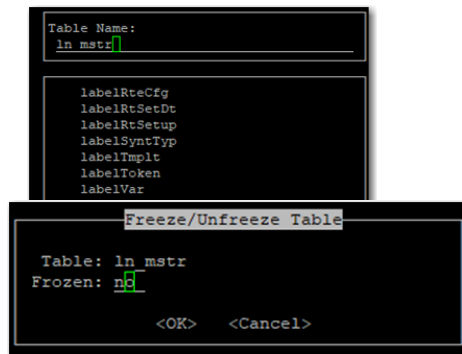


c Select Utilities | Freeze/Unfreeze:

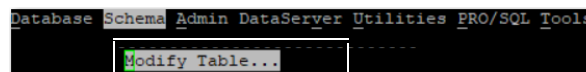


d Select each of following tables; then, set Frozen to No and click OK:

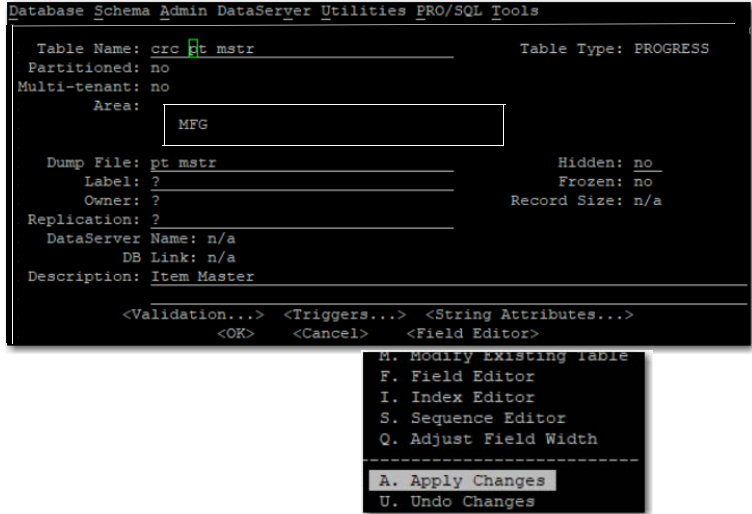
| | | |
|----------|-----------|---------|
| ln_mstr | serh_hist | wo_mstr |
| ser_mstr | pt_mstr | ptp_det |



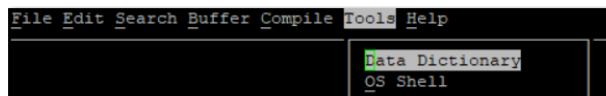
e Select Schema | Modify Table(s):



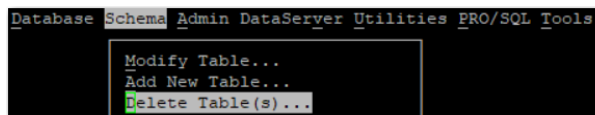
f Modify each table name by typing `crc_<original table name>` in the Table Name field; then select Apply Changes.



- 5 Re-add renamed tables by entering: `yab -clean database-qaddb-schema-update`
- 6 Start the database environment by entering: `yab start`
- 7 Run a buffer copy utility:
 - a Open a Progress Editor session.
 - b Select `File | Open`.
 - c Select the `utbfcopy.p` file in the following directory; then, run the utility.
`$ROOT/build/catalog/packages/productionorder/3/0/0/24/qad.productionorder/etc/utility`
- 8 Remove the renamed tables:
 - a Enter: `yab stop`
 - b Go to the database directory; then, enter: `pro mfgdb.db`
 - c Select `Tools | Data Dictionary`.



- d Select `Schema | Delete Table(s)`; then delete all renamed tables.



- e Enter: `yab start`
- 9 If you changed the YAB configuration in step 2 on page 8, change it back to the original setting. So, if you added the following, then remove it:
`db.qaddb.allowunrecognizedschema=true`

- 10 Verify that the YAB configuration value is back to what you started with by entering:

```
yab config db.qaddb.allowunrecognizedschema
```

Installing Data Collection Transactions for Production Orders

You can optionally install the QAD Automation Solutions: Data Collection menus and transactions for Production Orders. Only customers that use the Data Collections module should install the transactions and menus.

Use the following Data Collections programs to load the transactions and menus:

- Transaction Definition Import/Export (6.23.4)
- Process Category Import/Export (6.23.1)

Use the following steps to import the Data Collections transaction and menus:

- 1 Run Transaction Definition Import/Export to import the new data collections transactions. The transactions are located at:

```
${appdir}/dist/as-setup/transactions/productionorder/
```

- 2 Run Process Category Import/Export to import the new data collections menus. The menus are located at:

```
${appdir}/dist/as-setup/menus/productionorder/
```

For further details on importing data see *QAD Automated Solutions: Data Collection Installation Guide*, version 3.0.

Installing E-Signature Data

You must install QAD E-Signature seed data for use with Production Orders 3.0. Seed data is mandatory data that must be loaded for a program—in this case, Production Orders 3.0—to work properly. You use the following E-Signature programs to load the seed data:

- E-Signature Workbench Refresh (36.12.14.4)
- E-Signature Workbench Profile Maint (36.12.14.5)
- E-Signature Profile Activation (36.12.14.8)

Use the following steps to install the E-Signature seed data:

- 1 Run E-Signature Workbench Refresh to bring the new seed data into the E-Signature Workbench Profile. The seed data are located at:

```
${appdir}/config/electronic-signature/productionorder/
```
- 2 Run E-Signature Workbench Profile Maintenance to choose your desired E-Signature settings for that category.
- 3 Run E-Signature Profile Activation to activate your new seed data.

Note You can only enter tomorrow as the earliest date to start using this new profile.

Conversion

Once you install Production Orders, you should run a conversion program, even when you installed previous versions of Production Orders.

The conversion program prepares database records for use with the new functionality. Use the following procedure to run the conversion program:

- 1 Open a Progress Editor session.
- 2 Start the conversion program by executing the following command:

```
run us/ut/utprdord.r
```

 The conversion screen displays.
- 3 Set the Run Production Order Conversions field to Yes and start the conversion process.
 The Report Name field generates a report file name automatically. The system places the file in `build/work/client` where EE is installed. The report file shows statistics by domain of the record types that the system processed in the conversion.

Sample output from the conversion is as follows:

```
Domain:10USA,Table:lad_det,Count:0,Processed:0,Deleted:0
Domain:10USA,Table:mrp_det,Count:0,Processed:0,Deleted:0
Domain:10USA,Table:op_hist,Count:13488,Processed:1316,Deleted:0
Domain:10USA,Table:pt_mstr,Count:350,Processed:21,Deleted:0
Domain:10USA,Table:ptp_det,Count:24,Processed:0,Deleted:0
Domain:10USA,Table:rps_mstr,Count:110,Processed:110,Deleted:110
Domain:10USA,Table:wo_mstr,Count:5017,Processed:5017,Deleted:0
Domain:11CAN,Table:lad_det,Count:0,Processed:0,Deleted:0
Domain:11CAN,Table:mrp_det,Count:0,Processed:0,Deleted:0
Domain:11CAN,Table:op_hist,Count:12557,Processed:125,Deleted:0
```

Patches and Customized Programs

The installation package contains modifications to the existing QAD ERP programs; therefore, if you have applied QAD patches or customizations, it is your responsibility to review, and when needed, merge the QAD patch changes, customizations, and any other changes after applying the installation package. QAD does not support customized programs.

Refer to “Package Contents” on page 18 for a list of program files loaded during installation.

Trade Activity Management (TAM)

When TAM is installed in the environment, you must also install the Production Orders TAM integration files.

You install the TAM files manually. To do this, use the following procedure:

- 1 Copy one of the following directories, depending on your TAM version, from the Production Order etc/shared_files directory to the patches/mfg directory:

3-0-with-tam2-1-ee2016

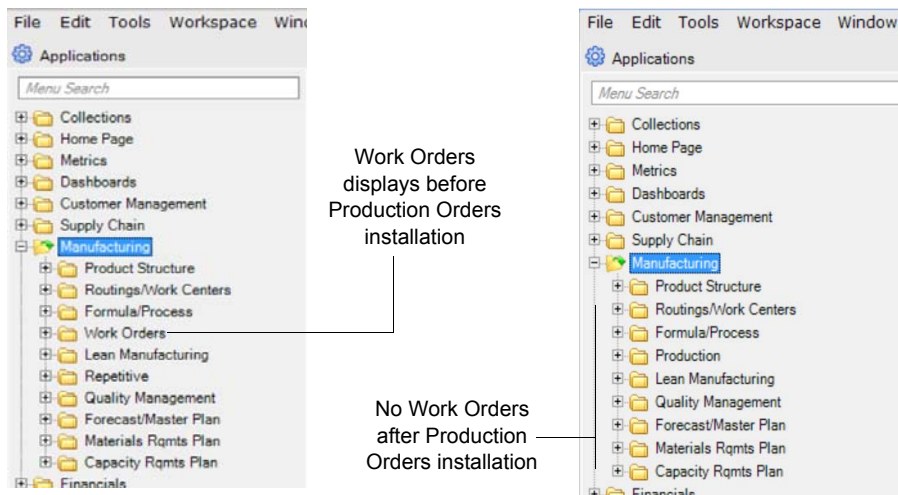
3-0-with-tam2-3-ee2016

- 2 Add the new directory to the compile propath and compile the contents by running this command: `yab -r code-mfg-update`

Installation Verification

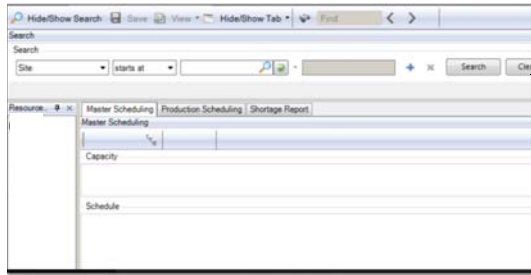
You can verify that the Production Orders and the Planning and Scheduling Workbenches installed. Use this method to verify that the package has installed successfully.

- 1 In your EE environment, verify that the Manufacturing menu now has *Production* in the list and both *Work Orders* and *Repetitive* removed.



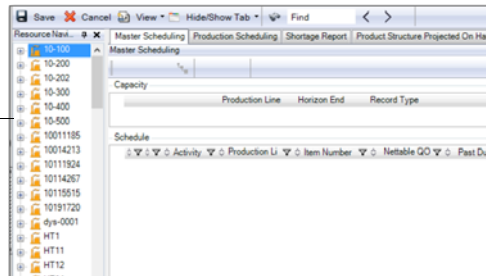
- 2 Check the layout of the Production Orders-compliant version of the Planning and Scheduling Workbenches. It is different from previous versions of the product.

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Previous versions of Workbenches layout

Production Orders-compliant version of Workbenches layout



3 Verify that the new Production Shop Floor Collection exists.

10USA USA Division [USD] - 10USACO USA DIVISION (2) - QAD Enterprise Applications

File Edit Tools Workspace Window Help

Processes: Production Shop Floor Collec...

Search (Order Status = R)

Site equals [] Search Clear All

Work Center equals []

Order Status equals R

Viewing 1 - 100 of 4360 Records per page: 100

| Production Order | ID | Parent Item | Sequen | Order Status | Component Status | Location Availability | Quantity Open | Release Date | Destination | Production Line | Work Center | Op. Sales/Job | Due Date |
|------------------|--------|-------------|--------|--------------|------------------|-----------------------|---------------|--------------|-------------|-----------------|-------------|---------------|----------|
| 8014 | 090612 | crz-b | | R | Shortage | Not Enough Inventory | 12.0 | 9/6/2017 | crz-a | crzwc001 | 10 | 9/6/2 | |
| 8014 | 090612 | crz-b | | R | Shortage | Not Enough Inventory | 12.0 | 9/6/2017 | crz-a | crzwc002 | 20 | 9/6/2 | |
| 8014 | 090612 | crz-b | | R | Shortage | Not Enough Inventory | 12.0 | 9/6/2017 | crz-a | crzwc003 | 30 | 9/6/2 | |
| 8591 | 090617 | crz-b | | R | Shortage | Not Enough Inventory | 17.0 | 9/7/2017 | crz-a | crzwc001 | 10 | 9/7/2 | |
| 8591 | 090617 | crz-b | | R | Shortage | Not Enough Inventory | 17.0 | 9/7/2017 | crz-a | crzwc002 | 20 | 9/7/2 | |
| 8591 | 090617 | crz-b | | R | Shortage | Not Enough Inventory | 17.0 | 9/7/2017 | crz-a | crzwc003 | 30 | 9/7/2 | |
| 090801 | 090801 | crz-a | | R | Shortage | Not Enough Inventory | 10.0 | 9/8/2017 | fg001 | crzwc001 | 10 | 9/8/2 | |
| 090801 | 090801 | crz-a | | R | Shortage | Not Enough Inventory | 9.0 | 9/8/2017 | fg001 | crzwc002 | 20 | 9/8/2 | |
| 090801 | 090801 | crz-a | | R | Shortage | Not Enough Inventory | 9.0 | 9/8/2017 | fg001 | crzwc003 | 30 | 9/8/2 | |

Production Order Component List

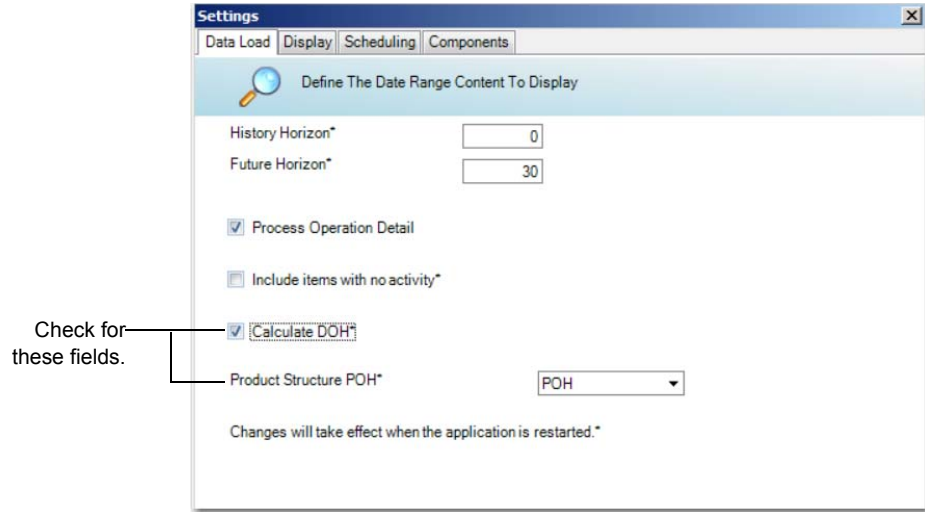
Package Issue Receipt Transactions by Item Browse Serial Master Browse

Viewing 1 - 3 of 3 Records per page: 100

| ID | Component Item | Gross Req | PQOH | Component Status | Location Availability | Item Description | Qty. Required | Quantity Picked | Quantity Issued | Allocation Policy | Issue Policy | Pick Policy |
|--------|----------------|-----------|--------|------------------|-----------------------|--------------------|---------------|-----------------|-----------------|-------------------|--------------|-------------|
| 091402 | crz-a-001 | 10.0 | 36.0 | Available | Backflush | component item 001 | 10.0 | 0.0 | 0.0 | Detail | Direct | Issue |
| 091402 | crz-a-002 | 10.0 | -156.0 | Shortage | Not Enough Inventory | component item 002 | 10.0 | 0.0 | 0.0 | Detail | Backfish | Transfer |
| 091402 | crz-a-003 | 10.0 | -177.0 | Shortage | Not Enough Inventory | component item 003 | 10.0 | 0.0 | 0.0 | Detail | Backfish | Transfer |

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- In your EE environment, start the QAD Planning and Scheduling Workbenches, version 4.2 that installed with the 3.0 Package. Check for new days on hand (DOH) preferences. In the QAD Planning and Scheduling Workbenches main screen, select Options | Preferences | Data Load.



Product Information Resources

QAD offers a number of online resources to help you get more information about using QAD products.

[QAD Forums \(community.qad.com\)](https://community.qad.com)

Ask questions and share information with other members of the user community, including QAD experts.

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