



QAD Adaptive Applications

# Backward Compatibility Upgrade: QAD Financials 2020

## Revised September 2020

**Note** This document is accurate as of September 2020. To ensure you have the latest version, check the QAD Document Library at [documentlibrary.qad.com](http://documentlibrary.qad.com).

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## Overview

This document provides the steps required to upgrade QAD Financials to a later 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 QAD Enterprise Edition core release. This capability allows you to implement QAD Financials 2020 on an existing Enterprise Edition implementation.

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

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

### Supported QAD Enterprise Edition Releases

- QAD Enterprise Edition 2016
- QAD Enterprise Edition 2017
- QAD Enterprise Edition 2018
- QAD Enterprise Edition 2019
- QAD Enterprise Edition 2020

### Supported Adaptive UX Releases

QAD Financials 2020 (enterprise-financials-app) can only be used in the Web UI with systems that are running Adaptive UX 2020 and higher.

**Important** QAD Financials 2020 is not compatible with earlier releases of Channel Islands nor QAD Adaptive UX 2019.

**Note** This guide covers the steps required to install QAD Financials 2020 into an earlier release of QAD Enterprise Edition. When installing into a system that is also running QAD Financials in the Web UI, you must complete additional steps. See “Installing a New Version of QAD Financials” in the [QAD Adaptive UX On-Premise Installation Guide](#) for details.

### YAB Requirements

For QAD Financials 2020 and later, the QAD Enterprise Edition environment in which you are executing the backward compatibility upgrade must be using YAB 1.6.7 or later. To check the YAB and YAB patch versions that are installed in your environment, enter:

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

For more information on upgrading YAB, see the [YAB Release Notes](#).

### 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 Adaptive ERP Administration and Configuration Guide*.

## Factory Defaults

The 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/config/data/<DefaultDataDirectory>
</defaultdata>
```

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

## Upgrade QAD Financials

The upgrade process involves:

- Performing a delayed installation of the 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 1**  
Required Packages

Name	Package Name	Minimum Version
Financials 2020	enterprise-financials-app	2020.0.0.x



## 2 Install the Financials package.

```
> yab -install-update:false install <download-dir>/enterprise-financials-app-2020.x.x.zip
```

```
> yab -install-update:false install enterprise-financials-app-2020.x.x.zip
Validating OK
Initializing instance OK
Reconfiguring instance OK
Resolving and copying packages OK
Cleaning up OK
```

```
INSTALL SUCCESSFUL
```

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

```
yab info | grep enterprise-financials-app
|- enterprise-financials-app          2020.0.x.x      local (new)
```

## 4 Reset conversion process.

```
> yab conversion-ee-upgrade-reset
conversion-ee-upgrade-reset (1 task) [APPLY]
-----
1/1 conversion-ee-upgrade-reset      OK (0.037 s)
-----
```

## 5 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)
```

## 6 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.

## 7 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.

## 8 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 Adaptive ERP Administration and Configuration Guide*.

## Upgrade QAD Financials with Adaptive UX 2020 Financials

As noted earlier in this guide, when installing into a system that is also running QAD Financials in the Web UI, you must complete additional steps. See “Installing a New Version of QAD Financials” in the *QAD Adaptive UX On-Premise Installation Guide* for details.