



Installation Guide **QAD Planning and Scheduling Workbenches**

Installation Introduction
Installation

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Change Summary

The following table summarizes significant differences between this document and the version released with previous Enterprise Edition release.

Date/Version	Description	Reference
March 2010.1 through 2013.1 EE enhancement/maintenance bundle for October 2013	Rebranded for 2010.1 up to 2013.1 EE installation September 2013 release.	
March 2010.1 through 2012.1 EE enhancement/maintenance bundle for March 2013	Rebranded for 2010.1 up to 2012.1 EE installation March 2013 release.	
	Updated the prerequisite for core processor per planner/scheduler	page 2
December 2010.1 through 2012.1 EE enhancement/maintenance bundle for December 2012.	Rebranded for 2010.1 through 2012.1 EE installation December 2012 release.	--
May 2010.1 through 2012 EE enhancement bundle	New document for enhancement bundle.	--

Installation Introduction

This chapter discusses the following configuration information:

Overview 2

Describes the chapter contents.

Prerequisites 2

Describes system and software prerequisites that must be met before you install the workbenches.

Installation Package 3

Describes the contents of the installation package.

Before You Begin 3

Provides tasks that you should perform before you begin installation.

Overview

This document provides instructions to install the Planning and Scheduling workbenches, version 3.3.5, a patch and enhancement release for Enterprise Edition versions 2010.1, 2011, 2011.1, 2012, 2012.1, 2013, and 2013.1

Prerequisites

The following are prerequisites for this release of the Planning and Scheduling Workbenches:

- QAD EE 2010.1, 2011, 2011.1, 2012, 2012.1, 2013, and 2013.1 installed.
- QAD Deployment Toolkit (QDT) installed and configured

Note QDT must be installed before QAD Enterprise Edition installation. For information on QAD EE and QDT installation, refer to the *Progress Database Installation Guide* for your EE version. You can find the *Progress Database Installation Guide* at www.qad.com |Support| Document Library | Enterprise Edition | *Your version* | Installation-Conversion:

<http://www.qad.com>

Where *Your version* is EE version 2010.1, 2011, 2011.1, 2012, 2012.1, 2013, or 2013.1.

- .NET UI required for your QAD EE installation
- Progress OpenEdge required for your QAD EE installation

Note Oracle databases are supported for QAD EE 2012, 2012.1, 2013, and 2013.1 only.

- Currently active QAD Maintenance license

You obtain the Maintenance license key through the following Web site:

<http://www.qad.com/erp/Support>

In the Web URL, select the Tools tab, then Downloads | Term License Key Request. Click the request, then follow the instructions to generate a license.

Once you obtain the license key, you must register the Maintenance license with the system through License Registration (36.16.10.1).

If you attempt to run either the MSW or PSW and you do not have an active Maintenance license, the system displays an error message. The system displays a warning if the active Maintenance license is close to the license expiration date.

Important Please be aware that even if you meet prerequisites listed in this section, the installation package does contain both schema changes (2010.1EE only) and 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.

Important Because the Planning and Scheduling Workbenches are powerful tools that summarize all your demand, supply, and capacity information across your planning/scheduling horizon, you should allocate one processor (core) per three production planners/schedulersto help prevent performance degradation.

Installation Package

Two types of installation packages are provided for the workbenches:

- Encrypted 4GL
- Unencrypted 4GL

Your individual installation package depends upon the type of QAD EE source code license that you have.

Before You Begin

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

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Installation

This chapter discusses the following information:

Overview 6

Provides an overview of the installation process and the two approaches to installation.

Beginning the Installation 8

Provides step-by-step instructions to load and unzip the installation zip file.

Using the Module Installer 8

Provides instructions to install using the Module Installer.

Manual Load of Schema Definitions (2010.1 only) 10

Provides instructions to manually load schema definitions.

Install Server-Side Artifacts 11

Tells you how to install all client-side components.

Install Client-Side Artifacts 15

Tells you how to install all client-side components.

System Setup 17

Describes system setup and tells you how to find information on the setup.

Update Related Program Help 17

Tells you how to load updated online help records.

Overview

This section provides instructions on how to install the Planning and Scheduling workbenches, version 3.3.5, a patch and enhancement release for Enterprise Edition versions 2010.1, 2011, 2011.1, 2012, 2012.1, 2013, or 2013.1. Your installation package consists of the following zip file:

```
netui-module-mswpsw-ee-ga-sourceLevel-3.3.5.n.zip
```

Where *sourceLevel* is either *unencrypted* or *encrypted*, depending on your source licensing agreement, and *n* is the 4th digit of the version build number.

Important Please be aware that even if you meet prerequisites listed in Chapter 1, the installation package does contain both schema changes (2010.1EE only) and 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.

The installation procedure covers both Oracle and Progress. Oracle versions only apply to 2012 and 2012.1.

Choosing an Installation Method

There are two methods available to install the workbenches:

- Use the Module Installer Utility.
This automates and streamlines much of the installation process.
- Use the manual installation approach.
This is similar to the installation process in previous Planning and Scheduling Workbenches EE installation packages.

You can use these methods in combination depending on the requirements of your installation. The following table summarizes the general requirements:

Table 2.1
General Requirements

Component Type	Module Installer	Manual Installation	Remarks
Server side			
• Install schema changes	No	Yes	Required for first-time 2010.1EE installations only
• Install and compile 4GL	Yes	Yes	Manual installation is necessary if using a layered PROPATH for source or compiled code
• Copy supporting files	Yes	Yes	
• Load system data	Yes	Yes	
• Load language translation data	No	Yes	
• Install QXtend QDocs	No	Yes	Required if you are using a version of QXtend prior to 1.7.1. See Kbase entry regarding the Planning and Scheduling Workbenches QXtend QDocs.
Client side			
• Install plugin	Yes	Yes	

Component Type	Module Installer	Manual Installation	Remarks
• Install collections	Yes	Yes	
Other			
• System setup	No	Yes	

Installation Examples

The following presents two examples of target environments and what you might use to install. The first example illustrates a very simple environment, and the second example illustrates a more complex environment.

Example 1: Simple Environment

Assume the following target environment:

- 2011.1EE.
- Layered PROPATH is not used.
- US English only.
- QXtend is not used.

Use the Module Installer to do the following all at once:

- Install and compile 4GL.
- Copy supporting files.
- Load system data.
- Install plug-in.
- Install collections.
- Use a manual installation for system setup.

Example 2: Complex Environment

Assume the following target environment:

- 2010.1EE.
- Layered PROPATH.
- Languages other than US English are used.
- QXtend.

There are two possible approaches. The first approach makes use of the Module Installer as much as possible:

- Use a manual installation to install the schema changes.
- Use a manual installation to install and compile 4GL.
- Use the Module Installer to do the following all at once:
 - Copy supporting files.
 - Load system data.
 - Install plug-in.
 - Install collections.

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- Use a manual installation to load language translation data.
- Use a manual installation to install QXtend QDocs.
- Use a manual installation for system setup.

The second approach utilizes **only manual installation**:

- Install the schema changes.
- Install and compile 4GL.
- Copy supporting files.
- Load system data.
- Load language translation data.
- Install plug-in.
- Install collections.
- Install QXtend QDocs.
- System setup.

Beginning the Installation

To start the installation process, perform the following:

- 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 MSW/PSW installation media.
- 3 Copy the installation package zip file to a directory of your choice.
- 4 Unzip the installation package zip file to a directory of your choice (hereafter termed the *InstallDir*).
- 5 Change the working directory to *InstallDir*.
- 6 Within the *InstallDir*, find and unzip the `manualinstall.zip` file.
The system creates the `manualinstall` subdirectory (hereafter termed the *ManualInstallDir*).

Using the Module Installer

With the Module Installer, you can quickly install 4GL, system data, the `version.msw` file, the client plug-in, and browse collections.

Whether you can install all of these components using the Module Installer depends upon your requirements. For example, if you need to maintain a layered PROPATH, or are installing into a 2010.1EE environment for the first time, then you install the 4GL using the manual approach described in this topic; however, you can still use the Module Installer to install other components, such as system data, the `version.msw` file, the client plug-in, and the browse collections.

To launch the Module Installer, invoke the following command at a command line prompt:

```
InstallDir/mswinstall.sh
```

The system presents a series of prompts. The following table lists the prompts and provides information to help you respond to the prompts.

Table 2.2
Module Installer Prompts and Responses

Prompt	Information for Response
Enter QDT Home full path directory [/dr01/qadapps/qdt]	This is the directory where QDT is installed
Enter environment name [live]	Enter the QDT environment name into which the selected components install.
Enter installer file name	Enter the name of your installation package zip file. This can be either a relative file path or an absolute file path.
Install 4GL? [yes]	Answer Yes or No to install this component.
Install system data? [yes]	Answer Yes or No to install this component.
Install client plugin? [yes]	Answer Yes or No to install this component.
Install collections? [yes]	Answer Yes or No to install this component.
Ok to proceed? [no]:	Answer Yes to proceed with the installation. Answer No to re-enter the values listed above.

Once complete, review the `mswinstall.log` file for successful completion.

Adding Additional Directories to the Compile PROPATH

To add additional directories to the compile PROPATH, make the following change before launching the Module Installer:

- 1 Edit the file `QDT_HOME/xml/QDT_serverName_environmentName.xml` where `QDT_HOME` is the home directory of your QDT installation, `serverName` is the name of the server on which QDT is installed, and `environmentName` is the QDT environment name.
- 2 Add the additional directories to the `directoryList` in the following `<compilePropath>` element:

```
<container name="mfg-code" env="environmentName" type="codeset">
...
<compilePropath>directoryList</compilePropath>
```

For example:

```
<compilePropath>/dr01/qadapps/gea/xrc,/dr01/qadapps/gea/xrc/proxy,/dr01/qadapps/gea/xrc/validation</compilePropath>
```

Manual Load of Schema Definitions (2010.1 only)

If you are installing the workbenches in a 2010.1EE environment for the first time, you must load a schema definition file. The schema definition file adds field definitions needed by the workbenches to the Work Order Master (wo_mstr), Production Line Master (ln_mstr), and Production Line Detail (ln_det) tables.

Load the Schema

For each mfg database (and associated empty databases), load the schema delta with the following procedure.

Note Before you do this, you may need to stop the other database clients, such as the AppServers, NetUI background telnet clients, and character clients, or access the database in single-user mode.

- 1 Start a Progress editor on the mfg database.

Note The mfg database is qaddb.

- 2 Type the following in the editor; then, press Go:

```
run ManualInstallDir/EE/2010.1/utility/mswutil.p
```

The system displays a list of options.

- 3 Select the Load schema delta df (2010.1 only) option.

The system prompts you for the name of the .df file. The name of the .df file defaults to *ManualInstallDir/EE/2010.1/schema/mswpsw_delta.df*.

- 4 Press the [F1] key to start the schema load.

The system completes the schema load.

Compile Your QAD Enterprise Edition 4GL

You use the QDT Deployment Toolkit (QDT) to install your version of QAD EE 4GL.

QDT is used to install QAD Enterprise Edition and other QAD products, like the Planning and Scheduling Workbenches. QDT streamlines the installation process by automatically finding system information (such as component locations) and modifying the QAD Enterprise Edition configuration profile appropriately.

QDT is installed from the application media shipped by QAD. For example, when you installed QAD Enterprise Edition, you performed the QDT install from the installation media.

QDT contains information about the current host including the operating system and currently installed versions of Progress, Java, and Tomcat.

Note You must have a graphical environment with full X-Windows capability.

- 1 Choose one of the following:

- To start QDT on Windows, select Start |All Programs |QAD Deployment Toolkit |Start QDT.
- To start QDT on Linux or UNIX, run the appropriate installation script for your version in the qdt_install_directory.

- To start QDT on Linux or UNIX, run the appropriate installation script for your version in the `qdt_install_directory`.

For example: `./qadinst` or `./qadinst.ksh`

The QDT main window displays.

2 In the QDT main window, select the Admin button.

3 Navigate to the Character Client Generate R-code pane as follows.

Note `environmentName` represents the name of the installed EE environment.

a In the left pane, expand the QAD EE `environmentName` Environment selection.

b In the expanded selections, expand the `environmentName: QAD EE` selection.

c In the expanded selections, expand the `environmentName: QAD EE Application` selection.

d In the expanded selections, select `environmentName: Character Client`.

e In the top right pane, select `Generate R-code`.

For Character Client, the system indicates when the R-code generation is complete in the Steps in Action Set frame.

f Press the Reset button.

4 Press the Edit button, then compile the 4GL, using the following compile steps.

a Add the directories `ManualInstallDir/EE/2010.1/chui/src` and `ManualInstallDir/EE/2010.1/chui/xrc` as the first directories in the Compile Propath text box.

b Select the R-Code Destination option, Staggered ERP Default.

c Compile QAD EE using the standard supplied compile list file, `QADInstallDir/utcompil.wrk`.

Note This compile is required because there are schema definition changes and some modified 4GL files (.p and .i).

d Compile the MSW/PSW program files using the supplied compile list file, `ManualInstallDir/EE/2010.1/utcompilmswpsw.wrk`.

Note QAD recommends that you take a layered approach when compiling and running the code. For example, you should place the output of the above compile steps in new, separate directories and reference them by client PROPATHs as follows:

- Directory containing output from compile step 2
- Directory containing output from compile step 1

Install Server-Side Artifacts

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

- Copy Supporting File

- Compile 4GL
- Load System Data

The following topics discuss each major step. Depending on which artifacts you were able to install using the Module Installer, you may not have to install those artifacts here.

Copy Supporting File

Copy the `ManualInstallDir/EE/[servicepack]/version.msw` file to `QADInstallDir` where `[servicepack]` is either 2010.1, 2011, 2011.1, 2012, 2012.1, 2013, or 2013.1.

Compile 4GL

Note When you install into a 2010.1EE environment, this section is not required because the compilation was performed as part of the schema load section.

The QAD Deployment Toolkit (QDT) is used to install QAD Enterprise Edition and other QAD products, like the Planning and Scheduling Workbenches. QDT streamlines the installation process by automatically finding system information (such as component locations) and modifying the QAD Enterprise Edition configuration profile appropriately.

QDT is installed from the application media shipped by QAD. For example, when you installed QAD Enterprise Edition, you performed the QDT install from the installation media.

QDT contains information about the current host including the operating system and currently installed versions of Progress, Java, and Tomcat.

Note You must have a graphical environment with full X-Windows capability.

Use the following QDT procedure to compile 4GL:

- 1 Choose one of the following:
 - To start QDT on Windows, select Start |All Programs |QAD Deployment Toolkit |Start QDT.
 - To start QDT on Linux or UNIX, run the appropriate installation script for your version in the `qdt_install_directory`.

Example `./qadinst` or `./qadinst.ksh`

The QDT displays.

- 2 In the QDT main window, select the Admin button.
- 3 Navigate to the Character Client Generate R-code pane as follows.

Note `environmentName` represents the name of the installed EE environment.

- a In the left pane, expand the `QAD EE environmentName Environment` selection.
- b In the expanded selections, expand the `environmentName: QAD EE` selection.
- c In the expanded selections, expand the `environmentName: QAD EE Application` selection.
- d In the expanded selections, select `environmentName: Character Client`.

- e In the top right pane, select `Generate R-code`.
For Character Client, the system indicates when the R-code generation is complete in the Steps in Action Set frame.
 - f Press the Reset button.
- 4 Press the Edit button, then compile the 4GL using the following compile steps:
- a Add the directories `ManualInstallDir/EE/[servicepack]/chui/xrc` and `ManualInstallDir/EE/[servicepack]/chui/src` as the first directories in the Compile Propath text box where `[servicepack]` is either 2010.1, 2011, 2011.1, 2012, 2012.1, 2013, or 2013.1.
 - b Select the R-Code Destination option, Staggered ERP Default.
 - c Use the supplied compile list file,
`ManualInstallDir/EE/[servicepack]/utcompilmswpsw.wrk` where `[servicepack]` is either 2010.1, 2011, 2011.1, 2012, 2012.1, 2013, or 2013.1.

Load System Data

System data dump files and a data load utility are included in the MSW/PSW installation package. This section first provides information on browse collections during installation, then presents the procedure to load the data.

MSW/PSW and CAC Browse Collection Definition Customizations

The installation process deletes and replaces MSW/PSW and CAC browse collection definitions; therefore, if you customized any of the browse collections, you must reapply the customizations once installation completes. The table below provides information on the browse collections that the installation process deletes and replaces.

Table 2.3
Browse Collection Definitions Replaced During Installation

Browse	Description
qp001	SearchPath
qp002	Production Order Component List
qp003	Component Check By Order/Production
qp004	Supply/Demand Summary
qp005	Component Chk By Order/Work Center
qp006	Component Chk By Item/Work Order
qp007	Supply/Demand Details
qp011	Item Planning
qp012	
qp013	
qp014	Item Master
qp016	Resource Type
qp017	Resources

Procedure to Load Data

To load the data, you must run the data load utility:

- 1 Start a Progress client session connected to the databases (for example, `qaddb` and `qadadm`) into which the data loads. You can use your normal QAD ERP session start-up for this purpose.
- 2 Enter the Progress Editor. If you started using a normal QAD ERP startup, you can enter the editor by typing `mgeditor` at the menu prompt.
- 3 Type `run ManualInstallDir/EE/[servicepack]/utility/mswutil.p` where `[servicepack]` is either 2010.1, 2011, 2011.1, 2012, 2012.1, 2013, or 2013.1 and press Go.
- 4 Select 3 Load System Data.
- 5 In the Data Directory prompt, enter `ManualInstallDir/EE/[servicepack]/data` where `[servicepack]` is either 2010.1, 2011, 2011.1, 2012, 2012.1, 2013, or 2013.1.
- 6 Press Go.
- 7 For 2010.1 only, to load language translation data for languages other than US English, perform the following:
 - a In the Progress Editor, type the following; then, press Go:

```
run ManualInstallDir/EE/2010.1/utility/mswutil.p
```
 - b Select option 2 Delete non-US English language detail records (2010.1 only) and follow the instructions displayed.
- 8 To load language translation data for languages other than US English, invoke Operational Language Data Load (36.24.6) from within a QAD EE session; then, repeat the following for each language to be loaded:
 - a Enter the two-character language code in the Language Code field. The following lists the language codes of supported languages:
 - cs (Castilian Spanish)
 - cz (Czech)
 - ls (Latin Spanish)
 - us (US English)
 - du (Dutch)
 - fr (French)
 - ge (German)
 - it (Italian)
 - jp (Japanese)
 - ko (Korean)
 - pl (Polish)
 - po (Portuguese)
 - ch (Simplified Chinese)

- tw (Traditional Chinese)
- b** Enter `new` in the Update Mode field.
 - c** In the Input Directory field, enter `ManualInstallDir/EE/[servicepack]/data` where `[servicepack]` is either 2010.1, 2011, 2011.1, 2012, 2012.1, 2013, or 2013.1.
Note It may be necessary to copy the contents of `ManualInstallDir/EE/[servicepack]/data` to a temporary directory as the maximum directory size that can be entered is 40 characters.
 - d** Check the Load Menu Title Detail check box.
 - e** Check the Load Message Master check box.
 - f** Uncheck the Master Comments check box.
 - g** Check the Load Language Detail check box.
 - h** Check the Load Label Master check box.
 - i** Press Go.

QXtend Requirements

If you use QXtend Inbound with any of the functions listed below, you may need to install updated QDocs. See the KBase entry describing QDocs for use with the workbenches.

- Site Maintenance (1.1.13)
- Item Master Maintenance (1.4.1)
- Item-Site Planning Maintenance (1.4.17)
- Work Center Maintenance (14.5)
- Work Order Maintenance (16.1)
- Production Line Maintenance (18.1.1)
- Production Line Maintenance (18.22.1.1)

Install Client-Side Artifacts

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

- Install the Client Plug-In
- Install CAC Browse Collections

Install the Client Plug-In

Use the following procedure to install the client plug-in.

- 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

```
ManualInstallDir/client/plugins/buildzips_dotnetn/Qad.Plugin.Planning  
Scheduling-x.x.x.x.zip
```

where:

n is either 2 (for NETUI version 2, that is, used by 2012.1EE and earlier) or 4 (for NETUI version 3, that is, used by 2013EE and later)

x.x.x.x represents the installation package version number

4 Edit the plug-in manifest file by typing:

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

a If the following line does not already exist in the list of <package> elements, then add it:

```
<package path="" ref=  
"${Repos}/plugins/QAD.Plugin.PlanningScheduling/manifest.qpkg" />
```

Install CAC Browse Collections

The installation package contains the following browse collection definition files:

- Manage Materials for Production Line
(210cc806-a72e-4c4b-a30b-7457c3b745af.bc.xml)
- Manage Materials for Work Center
(c6018a5d-8bbd-413c-98ba-5b1d17a405ab.bc.xml)
- Monitor Material Shortages
(221e54fc-53ba-47f0-93c0-420a31a11d9d.bc.xml)
- Purchase Direct Materials
(38d7f042-87e3-46e7-b1cd-5128c79e51fd.bc.xml)
- Release Production Orders by Production Line
(d6d7f6f5-28c8-4db2-a42d-a90c4087392c.bc.xml)
- Release Production Orders by Work Center
(4ad3793c-06b0-453d-9cf5-28005219bae2.bc.xml)

Use the following steps to install the component availability check browse collections:

1 Copy the collections definitions files to your home server:

```
cp ManualInstallDir/client/collections/[servicepack]/*  
TomcatInstallDir/webapps/HomeWebAppDir/configurations/~  
configurationname/storage/browse-collections
```

Where *configurationname* represents all configuration directories that you have created, including the default directory.

2 In the browse-collections directories to which you copied the collections definitions, rename the following files, if present (for example, rename to *filename.xml.bak*):

- 79e92e85-5edb-4f56-8760-3a2e4058a8ce.bc.xml
- 7ed73756e-fd3f-4645-876f-e595dbaed436.bc.xml

System Setup

Your user documentation for the Planning and Scheduling Workbenches describes setup steps that you should complete before you begin using the workbenches. For example, you must enable the workbenches in QAD EE programs before you can use them.

For setup, the user guide tells you how to:

- 1 Enable the workbenches.
- 2 Synchronize resource tables.
- 3 Set up production lines.

Update Related Program Help

QAD EE core programs have additional fields that help them process and prepare data for use with the workbenches. You can load the online help for these programs into a UNIX character environment by loading an FHD file, supplied on the workbenches release media.

The following procedure tells you how to load character-mode online field and procedure help. It does not affect custom help.

- 1 From a single-user QAD EE character session, open Field Help Load (36.4.19).
- 2 Leave Field, Procedure, Status, and Text Type blank.
- 3 Complete the other fields:
 - Language: Enter an appropriate two-letter language code (such as US for English).
 - Field Help Load File: Enter the full path to the help data file `ChangedHelpforEE.fhd`.
- 4 Skip loading help with lower status: Enter Yes.
- 5 Press Go to begin the load.
- 6 Exit Field Help Load when the load is finished.

