



QAD Enterprise Applications

Installation Guide
QAD Enterprise Asset
Management

78-0955-2017.1EAM
QAD Enterprise Asset Management 2017.1
September 2017

This document contains proprietary information that is protected by copyright and other intellectual property laws. No part of this document may be reproduced, translated, or modified without the prior written consent of QAD Inc. The information contained in this document is subject to change without notice.

QAD Inc. provides this material as is and makes no warranty of any kind, expressed or implied, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose. QAD Inc. shall not be liable for errors contained herein or for incidental or consequential damages (including lost profits) in connection with the furnishing, performance, or use of this material whether based on warranty, contract, or other legal theory.

This document contains trademarks owned by QAD Inc. and other companies.

Copyright © 2017 by QAD Inc.

EnterpriseAssetMgmt_IG_v2017_1EAM.pdf/b3s

QAD Inc.

100 Innovation Place
Santa Barbara, California 93108
Phone (805) 566-6000
<http://www.qad.com>

Contents

QAD EAM Install Guide Change Summary	v
Chapter 1 Installation Overview	1
Installation Process Overview	2
System Overview	2
Sizing and Capacity Planning	2
General Prerequisites	3
Supported Versions	3
Software and Hardware Prerequisites	3
Chapter 2 Upgrading Enterprise Asset Management	5
Upgrading from EAM 11	6
Upgrading from EAM 12.x or EAM 2015	6
Upgrading from EAM 2016 and Higher	6
EAM Add-On Files	6
Chapter 3 Installing Enterprise Asset Management	7
Overview	8
Installing the Latest Version of YAB 1.6	8
Installing EAM 2017.1	8
Chapter 4 Post-installation Configuration	11
Set Up the ERP Login	12
.....	12
Product Information Resources	13

QAD EAM Install Guide Change Summary

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

Date/Version	Description	Reference
September 2017/EAM 2017.1	Updated General Prerequisites, including the requirement of Python.	page 3
	Updated the upgrade instructions.	page 6
	Added steps for installing YAB 1.6.	page 8
March 2017/EAM 2017	Updated the information for upgrading earlier EAM installations to the new version.	page 5
October 2016/EAM 2016.1	Added requirement to install latest patch for 2016 EE before beginning EAM installation.	page 3
	Created a new chapter to explain the different scenarios for upgrading to EAM 2016.1.	page 5
	Added information on installing the latest version of YAB.	page 8
June 2016/EAM 2016-Rev3	Updated installations steps.	page 8
	Removed process to set up Progress Editor.	--
June 2016/EAM 2016-Rev2	Updated package requirements for download.	page 8
	Added instructions on required property used to identify ERP version.	page 8
	Added instructions on property used to install optional QMI data.	page 8
May 2016/EAM 2016-Rev1	Added requirement of QAD .NET UI 3.2 cumulative patch.	page 3
March 2016/EAM 2016 (v13)	Introduced installing EAM in a YAB environment.	--
	Removed all information pertaining to EAM installation and configuration using QDT.	--
September 2015/EAM 2015-Rev 2 (v12.9)	Revised Figure 1.1	page 2
	Revised the Installation Process Overview section	page 2
	Revised the EAM Installation Options section	page 3
	Removed QXtend information from the EAM Add-on Files section	page 7
	Removed the Patch Installation section	page_12
	Removed the Configuring the Admin Environment section	page_22
	Revised the procedure in Interfacing to QAD SE and EE	page 32
	Revised step 32 of Manually Setting Up QAD EE Financial Components	page 35
	Removed the Applying the Fixed Asset Patch (EE Only) section	page_36
Removed the Configure QXtend section and other QXtend-related content from Post-Installation Configuration	page 12	

Date/Version	Description	Reference
April 2015/EAM 2015-Rev 1 (v12.9)	Revised Figure 1.1 and the text in the Installation Process Overview	page 2
	Revised Database Server Requirements to include 2015 EE	page 6
	Revised Application Server Requirements to include 2015 EE	page 7
	Revised Initiating the Installation	page 17, page 18
April 2015/EAM 2015 (v12.9)	Rebranded for EAM 2015 (v12.9)	---
	Numerous editorial changes	---
	Added Korn Shell section	page 4
	Revised the AIX requirements information	page 5
	Deleted Red Hat 6 section and merged content with the new Korn Shell section	page 5
	Updated Database Server Requirements	page 6
	Updated Application Server Requirements	page 7
	Updated Web Server Requirements	page 7
	Renamed the “Installing the Media to Linux/UNIX” section as “Initiating the Installation”	page 16
	Revised Initiating the Installation	page 16
	Documented Select Product Version window	page 17
	Revised Interfacing to QAD SE and EE	page 31
	Updated Configure EAM Application Screen	page 31
	Updated Figure 3.15 Edit Compiler Settings	page 32
Added step 38 and Figure 3.19 for disable AIA connection	page 34	
September 2014/EAM 12.8	Numerous editorial changes	---
	Reorganized the guide to remove the default installation option and to document a single installation work flow that includes interfacing to QAD EE and SE	---
	Revised Installation Process Overview	page 2
	Revised Installing the QAD Deployment Toolkit	page 9
	Removed the Installing a Complete EAM Configuration chapter	---
	Changed the name of the Installing a Custom EAM Configuration chapter to EAM Configuration	page 21
	Revised EAM Configuration	page 21
March 2014/EAM 12.7	Added section to set up Progress editor	---
	Added information on starting QDT in AIX environments	page 5
	Updated supported Java versions	page 6 page 7 page 7
	Updated the Tomcat Web server information	page 7
November 2013/EAM 12.6 Rev 1	Added note regarding users upgrading from QAD SE to EE	page 4
October 2013/EAM 12.6	Revised QDT Installation	page 10
	Moved Installing Media to Linux to Ch. 2	page 16
	Revised Custom EAM Configuration	page_25
	Added the Configure QXtend procedure	page_46

Date/Version	Description	Reference
April 2013/EAM 12.5.2	Rebranded 12.5.2	--
	Added Upgrading From a Previous Version of EAM section	page 7
December 2012/EAM 12.5.1	Updated EAM 11 to EAM 12 conversion information.	page 7
September 2012/EAM 12.5.1	Updated Progress database server software requirements	page 6
	Updated Fixed Asset patch procedure.	page_36
April 2012/EAM 12.5	Removed obsolete language-specific scripts information.	--
	Removed editing language details information.	--
September 2011/EAM 12.4	Updated installation media add-on files information.	page 7
	Added fixed asset patch installation procedure detailing upgrade procedures. Updated other version-specific information.	page_36

Installation Overview

This chapter describes the Enterprise Asset Management installation process and provides system requirements and software prerequisites.

Installation Process Overview 2

System Overview 2

Sizing and Capacity Planning 2

General Prerequisites 3

Software and Hardware Prerequisites 3

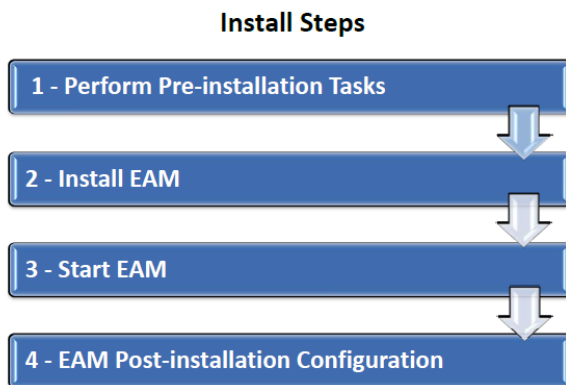
Installation Process Overview

EAM 2017.1 is installed into an existing QAD Enterprise Edition 2016 or 2017 environment. Before installing EAM, you must first install and configure QAD Enterprise Edition. QAD Enterprise Edition is installed using the QAD Enterprise Edition installer and is managed using the QAD YAB client. YAB is a deployment and management toolset that covers all products installed into an Enterprise Edition environment.

See *QAD Enterprise Edition Installation Guide* for more information about using YAB.

The following figure represents the overall flow of the installation process.

Fig. 1.1
QAD EAM Installation Process



The following steps describe the EAM installation process.

- 1 Determine if your system hardware, software, and configuration meet the requirements for EAM installation. Then set up your system according to the requirements defined in this chapter or with the assistance of QAD Services.
- 2 Download or mount the install files and run the YAB install command.
YAB installs and configures the selected components using default configuration values generated during the auto-discovery process or using your custom configuration values.
- 3 Start your new EAM installation and log in.
- 4 Perform post-installation EAM configuration.

System Overview

An EAM system consists of server components installed on a UNIX host and the QAD .NET UI client installed on multiple Windows computers.

Sizing and Capacity Planning

The server contains QAD EAM and Progress server software, as well as your production data. Before starting an installation, estimate the eventual size of your production database and the demands on the different database components. This information helps you to lay out your disks.

EAM requires a minimum of 12 GB to install and configure the product for one environment. This memory requirement does not include the additional space needed for multiple languages or major changes to the production databases.

For assistance with hardware sizing and capacity requirements planning, contact QAD Services.

General Prerequisites

The following general prerequisites apply:

- QAD Enterprise Edition 2016 or 2017, including the latest cumulative patch.
Note EAM will not install successfully with Enterprise Edition 2016 without at least patch 2016.0.16.397 installed for QAD 2016 EE. You can check your version by running `yab info` and reviewing the version of `mfg-ee2016-patch`. If you do not have at least 2016.0.16.397, download the patch from the QAD Store and install before continuing.
- The latest QAD .NET UI cumulative patch for your QAD Enterprise Applications version.
- YAB 1.6.
- Python 2, version 2.4 or higher.
- The QAD EAM media or product download from the QAD Store.
- A valid product license key.
- An accomplished UNIX and Progress database administrator who can manage Progress client processes.
- A 100 Mbps or faster network.
- Easy access to this guide.

Supported Versions

You can install QAD EAM 2017.1 with QAD Enterprise Edition 2016 and 2017.

Important If you are upgrading from QAD SE to EE, there is currently no migration tool for EAM. For further assistance, contact QAD Support.

Software and Hardware Prerequisites

For the current requirements information, refer to the Product Compatibility Guide in the QAD Store at:

<http://store.qad.com/content/compatibility-guide>

Refer to the Progress documentation for the complete requirements for Progress components. When installing Progress components, always select a Complete installation, not a Typical or Custom installation. For information about Enterprise Edition Progress installation, refer to the *QAD Enterprise Edition Installation Guide*.

4 QAD Enterprise Asset Management Installation Guide

Upgrading Enterprise Asset Management

This chapter describes upgrading your current Enterprise Asset Management instance to EAM 2017.1.

Upgrading from EAM 11 6

Upgrading from EAM 12.x or EAM 2015 6

Upgrading from EAM 2016 and Higher 6

EAM Add-On Files 6

Upgrading from EAM 11

Upgrading an EAM 11.x installation requires a conversion utility. Contact QAD Support to obtain the latest version of the utility and refer to the *Enterprise Asset Management Conversion Guide: EAM 11 to EAM 2017*.

Upgrading from EAM 12.x or EAM 2015

Upgrading from EAM 12.x or EAM 2015 is a multi-step process. First, you must install EAM 2016, upgrade and import your original database to 2016, and then install EAM 2017.1.

- 1 Download and install EAM 2016. See the [QAD Enterprise Asset Management Installation Guide](#) for EAM 2016.
- 2 Using the information in the `/add_ons/v13upgrade` folder, upgrade and import your original system's data into the newly installed instance of EAM 2016.
- 3 Ensure your system meets the "General Prerequisites" on page 3, including the latest QAD 2016 EE patch.
- 4 Install EAM 2017.1. The EAM install process will search for and detect EAM 2016 and automatically upgrade your software.

Upgrading from EAM 2016 and Higher

Once your system meets the "General Prerequisites" on page 3, including the latest QAD 2016 EE patch, install EAM 2017.1. The EAM install process will search for and detect EAM 2016 and automatically upgrade your software.

EAM Add-On Files

To complete your installation, you may need the `v13upgrade` subdirectory in the installation media `add_ons` directory. The `v13upgrade` subdirectory contains instructions and tools to help upgrade older versions of EAM.

Installing Enterprise Asset Management

Enterprise Asset Management is installed from the command line with a simple command related to Enterprise Edition administration.

Overview 8

Installing the Latest Version of YAB 1.6 8

Installing EAM 2017.1 8

Overview

In a YAB environment, QAD software is organized into packages. EAM installation requires the latest version of YAB and the eam package.

Installing the Latest Version of YAB 1.6

If you are installing EAM into QAD Enterprise Edition 2016, follow these steps to install YAB 1.6. If you are installing into QAD Enterprise Edition 2017, these steps are already complete.

- 1 Open the `configuration.properties` file and enter:

```
python.executor=<path to python interpreter>
```
- 2 Download the latest `yab-ee-image-VERSION.zip` file from QAD Release Fulfillment and make the file available on the server.
- 3 Run `yab install yab-ee-image-VERSION.zip`.

Installing EAM 2017.1

Follow these steps to install EAM 2017.1.

- 1 Download the EAM zip file from QAD Release Fulfillment. Place the file in a convenient location, for example, the `/qad/install` directory on the server where EAM will be installed.
- 2 Navigate to the directory where Enterprise Edition is installed.
- 3 Update your YAB configuration with specific settings for your install.
 - a `vi build/config/configuration.properties`
 - b Set the property to identify your ERP version. For 2016 EE or 2017 EE, this value equals `2016QRA`, as in the following example.

```
qadeam.erp-version-dir-name=2016QRA
```
 - c Optionally set the property to install QMI data.

Note Only set this property for demo or training purposes. Do not set this property when installing into a production environment.

- 4 Run the `yab install` command, including the full path to the EAM package zip file.

Important This will perform a full YAB update, during which the environment will be fully restarted.

Example

```
$ yab install /eam-yab-compatible-VERSION.zip
```

- 5 The system performs additional EAM installation steps.

Note If the installation fails, check the `./build/logs/yab.log` file.

Once installed, the `yab info` command should include, among others, the following two packages:

- eam
- yab-eam

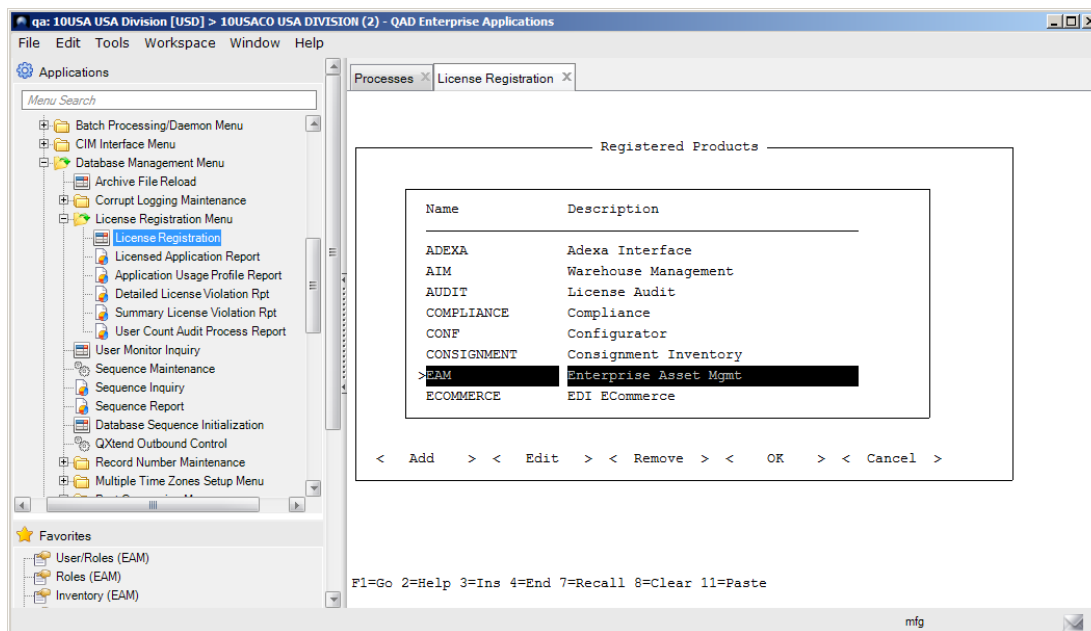
The installation creates the following directory in the local catalog:

```
./build/catalog/packages/eam
```

This contains the EAM source code as well as dmp standard files. The EAM compiled code is stored under `./dist/eam`.

- 6 Log in to QAD Enterprise Applications. Enter your EAM license code in License Registration (36.16.10.1).

Fig. 3.1
License Code Registration



Post-installation Configuration

This section describes what you must do after completing an installation to ensure that the application is ready for use.

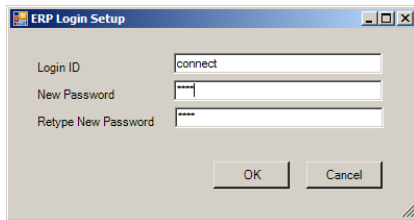
Set Up the ERP Login 12

Set Up the ERP Login

EAM requires a login to access the QAD modules for updates, such as General Ledger transactions.

- 1 In EAM, open the System Control browse at System Administration|System Control (EAM) and select ERP Login Setup from the Action menu.

Fig. 4.1.
ERP Login Setup



The screenshot shows a standard Windows-style dialog box titled "ERP Login Setup". It contains three text input fields. The first field, labeled "Login ID", contains the text "connect". The second field, labeled "New Password", and the third field, labeled "Retype New Password", both contain four asterisks (****). At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

- 2 Enter a valid Login ID and Password for QAD.
Note This setup window also can be used to update existing settings.
- 3 Click OK.

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.

[QAD Knowledgebase \(knowledgebase.qad.com\)*](https://knowledgebase.qad.com)

Search for answers, tips, or solutions related to any QAD product or topic.

[QAD Document Library \(documentlibrary.qad.com\)](https://documentlibrary.qad.com)

Get browser-based access to user guides, release notes, training guides, and so on; use powerful search features to find the document you want, then read online, or download and print PDF.

[QAD Learning Center \(learning.qad.com\)*](https://learning.qad.com)

Visit QAD's one-stop destination for all courses and training materials.

*Log-in required

