

Industry-specific

QAD SOLUTIONS

Manufacturing Applications

Installation Guide
Trade Management 2.6
Service Pack 1



Trade Management 2.6
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Overview

This document is a simplified set of steps for installing Service Pack 1 (SP1) on QAD Trade Management (TrM) 2.6. The base TrM 2.6 installation incorporates the service pack installation. Only those sites that already have an installed TrM 2.6 environment should use the instructions in this document to run a separate service pack install.

The TrM 2.6 SP1 disk is the same whether you are installing 2.6 for the first time or just upgrading to SP1. In either case, you install the complete media to the *TrMInstallDir* on your server.

Important If you are currently on the initial TrM 2.6 release and plan to do a full reinstallation rather than just a service pack upgrade, follow the instructions in the installation guide and any Trade Management errata from the QAD Web site.

The service pack installation requires the following steps:

- Back up your production TrM environment.
- Install TrM 2.6 SP1 media to the TrM 2.6 install directory.
- Run utilities to:
 - Load additional data into your TrM 2.6 production databases.
 - Remove redundant TrM menus.
- Remove the redundant deal accrual account menu option in Division Maintenance.
- Compile the TrM 2.6 SP1 release.

Prior to Installation

This document assumes the person completing this installation has Trade Management installation experience and is proficient in Progress.

The cut-off date for the TrM service pack can be found in the `version.mfg` file in the `/trm` directory on each service pack CD.

Installing TrM 2.6 SP1 Files

In this set of steps, you install the full TrM 2.6 SP1 release to your Trade Management installation directory.

- 1 Log in as an administrative user with read, write, and execute permissions for your TrM environment. On UNIX systems, this is typically the `mfg` user.

- 2 Mount your TrM 2.6 installation media.

- 3 Change to the `install` directory:

```
cd install
```

- 4 Launch the database server installation script in that directory:

```
./install.ksh
```

For Windows, run `install.exe` from Run on the Start menu.

- 5 Accept the license agreement.

- 6 Select the location for the TrM installation log. You should typically use the default directory. This ensures subsequent installations can locate the log directory with all relevant TrM install information. The default is:

```
/home/mfg/instlog
```

The default file name is `mfgchrcl.log`.

- 7 Respond to the following prompts:

- Progress installation directory
- MFG/PRO installation directory
- Trade Management 2.6 installation directory

- 8 Review the summary screen and select Yes to begin copying the files. Enter No to reenter installation information.

- 9 Remove and store the TrM media.

- 10 Check `mfgchrcl.log` for errors.

Updating Production Databases

The updates required for existing TrM 2.6 environments are to compile the full TrM 2.6 SP1 release, run utilities to load additional data into your TrM 2.6 production databases and remove redundant TrM menus, and to run a program to remove the redundant deal accrual account menu option.

Compile the Full 2.6 SP1 Release

A full compile of the updated TrM release is required. This section provides a simplified set of instructions. For further information on the compile, see Compiling TrM Code in *Installation Guide: Trade Management (78-0620D)*.

TrM is compiled in two passes, as documented in the installation guide. The first pass uses `utuscomp.wrk`, the second, `utcompil.wrk`.

- 1 Launch MFG/UTIL from the `MFGPROInstallDir` using the following command: `./mfgutil`.
In Windows, double-click the MFG/UTIL icon.
- 2 Choose Compile Procedures from the Programs menu.
- 3 The Compiler Options screen displays. The screen should retain the last compile setup you entered. If this was for TrM 2.6, the only changes required are to enter the compile list file name, `utuscomp.wrk`.
- 4 Refer to *Installation Guide: Trade Management* for additional details on the compile options. Then, when ready, choose Compile.
- 5 In the compile verification screen, verify the compile information. If the compile settings are correct, choose Continue. If the settings are incorrect, choose Back to make changes.
- 6 When the compile is complete, check for errors in the log window and choose Close.
- 7 Choose Compile Procedures from the Programs menu again to launch the second compile.
- 8 In Compiler Options, enter the second compile list file, `utcompil.wrk`, and choose Compile.
- 9 Verify the compile information in the compile verification screen and choose Continue. If the settings are incorrect, choose Back to make changes.
- 10 When the compile is complete, check for errors in the log window, and choose Close.

Run Data Load Utility

The `uttrmld.p` utility loads TrM administration data into MFG/PRO. This can be run from any menu in MFG/PRO.

- 1 Launch an MFG/PRO session.
- 2 In any menu in MFG/PRO, type in the full utility program name in the command line:
`uttrmld.p`
- 3 A screen displays with a single field where the source directory for the data load should appear. The directory is:
`TrMInstallDir/us/mfg`
- 4 Press Go to initiate the load.
- 5 Once the `/mfg` load is complete, run the `uttrmld.p` program again. Enter the following directory:
`TrMInstallDir/sp1`
Note Case is significant for this command; enter the `sp1` directory in lower-case letters.
- 6 Press Go to initiate the load.

Run Redundant TrM Menu Program Removal Utility

This utility removes redundant TrM menus from the MFG/PRO menus.

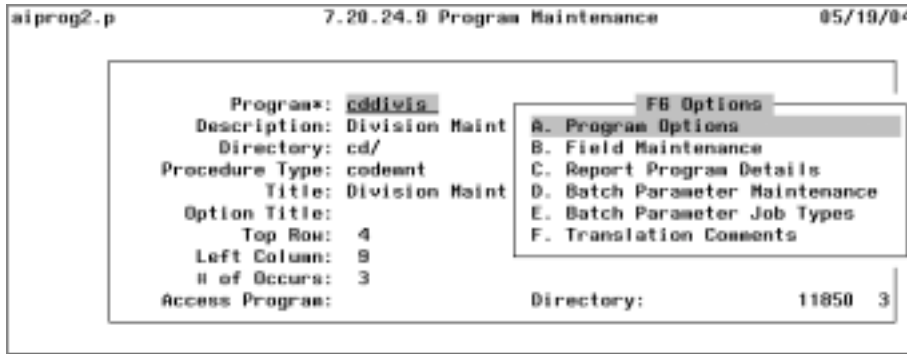
- 1 In any menu in MFG/PRO, type in the full utility program name in the command line:
`utdelmnu.p`
- 2 Press Go to perform the deletions.

Remove Obsolete Menu Option from Division Maintenance

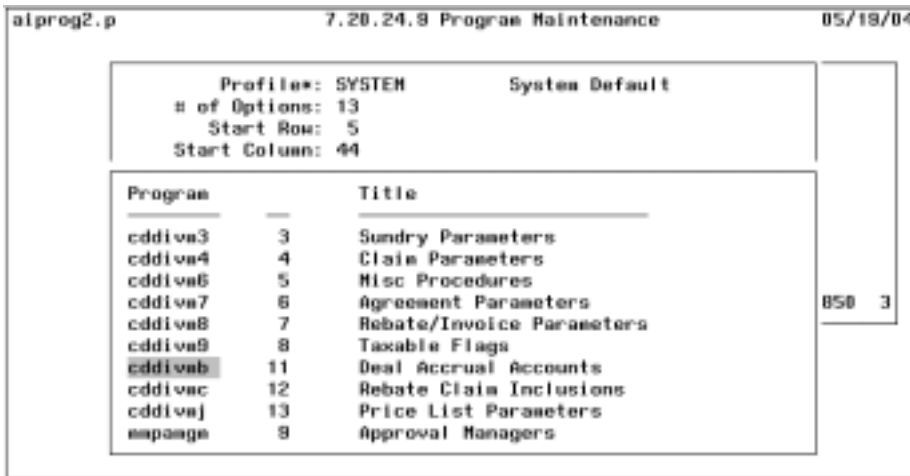
The following steps remove the obsolete deal accrual account update program from the Division Maintenance Option menu. You first remove the program from the menu, then reassign the following programs to close the gap left in the menu.

- 1 Navigate to Program Maintenance (7.20.24.9).
- 2 Enter `cddivis` in the program entry field and press the down arrow.

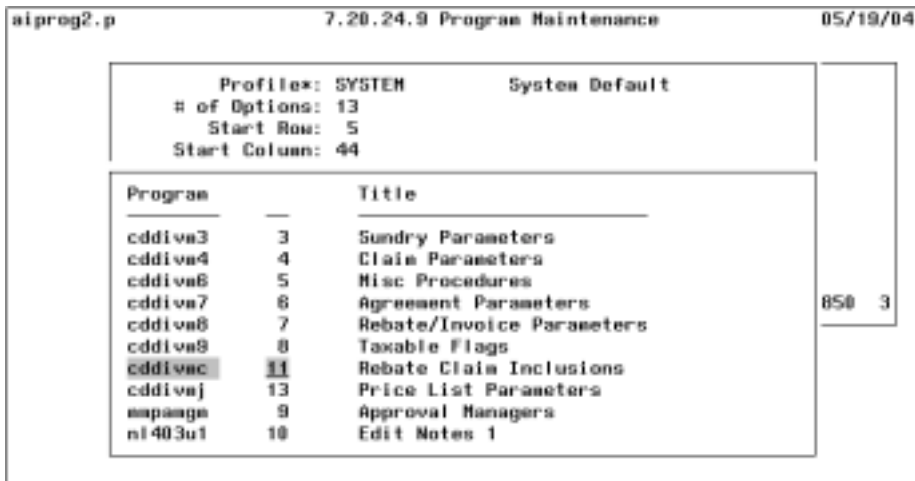
- 3 Press F6 and select Option A: Program Options.



- 4 Press Go twice to bring up the list of programs in the option menu.
- 5 Select program cddivmb, Deal Accrual Accounts, and press Delete.



- 6 Select cddivmc, Rebate Claim Inclusions, and press Enter.
- 7 Change the menu location value from 12 to 11. Press Go.



8 Select `cddivmj`, Price List Parameters, and press Enter.

9 Change the menu location value 13 to 12. Press Go.

10 Exit Program Maintenance to the main menu.

This completes the TrM compile and your Service Pack 1 update.