

Industry-specific

QAD SOLUTIONS

Manufacturing Applications

Installation Guide Trade Management



78-0620D
Trade Management 2.6, Service Pack 1 and Higher
July 2004

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The background of the page is a grayscale image of several interlocking gears. The gears are of various sizes and are arranged in a way that they appear to be meshing together. The lighting is soft, creating subtle shadows and highlights on the teeth of the gears, giving them a three-dimensional appearance. The overall tone is technical and industrial.

About This Guide

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Use this guide to install Trade Management (TrM) on a UNIX, Linux, or Windows server. Windows installations support character clients only. For graphical interfaces, run QAD Desktop.

These instructions are for the system administrator who manages the database and is familiar with the installation operating system, networking, and Progress.

TrM and Service Pack Installation

Each TrM 2.6 release is completely remastered. Therefore, if you are installing TrM 2.6 for the first time, regardless of service pack level, the entire release including all service pack updates is included during the base installation; no additional steps are required.

If you are upgrading from the TrM 2.6 initial release (IR) or an earlier service pack to the most recent TrM 2.6 service pack, follow the specific steps outlined in the service pack installation guide provided on the CD.

If you are installing an MFG/PRO service pack, contact QAD Support Services for information regarding compatibility with TrM.

Installation Errata

▶ See “QAD Web Site” on page 3 for information.

In addition to these instructions, you may receive a supplementary errata sheet with changes and additional instructions. Check your product package. In addition, when you begin the installation, check the QAD Web site to verify that you have the latest version.

Other TrM Documentation

For information on using Trade Management, refer to *User Guide: Trade Management* and *User Guide Supplement: Trade Management*. The supplement includes information about the latest changes and enhancements to the application.

For technical details, refer to *Trade Management Entity Diagrams* and *Trade Management Database Definitions*.

To view documents online in PDF format, see the *Supplemental Documents on CD*.

Note The Trade Management installation guide is not included on a CD. Printed copies are packaged with your software. Electronic copies of the latest versions are available on the QAD Web site.

Online Help

Trade Management has an extensive online help system. Help is available for most fields found on a screen. Procedure help is available for most programs that update the database. Most inquiries, reports, and browses do not have procedure help.

For information on using the help system, refer to *User Guide: Trade Management*.

QAD Web Site

The QAD Web site provides a wide variety of information about the company and its products. You can access the Web site at:

<http://www.qad.com>

For MFG/PRO users with a QAD Web account, product documentation is available for viewing or downloading at:

<http://support.qad.com/>

You can register for a QAD Web account by accessing the Web site and clicking the Accounts link at the top of the screen. Your customer ID number is required. Access to certain areas is dependent on the type of agreement you have with QAD.

Most user documentation is available in two formats:

- **Portable document format (PDF).** PDF files can be downloaded from the QAD Web site to your computer. You can view them with the free Adobe Acrobat Reader. A link for downloading this program is also available on the QAD Web site.
- **HTML.** You can view user documentation through your Web browser. The documents include search tools for easily locating topics of interest.

Features also include an online solution database to help QAD customers answer questions about setting up and using the product. Additionally, the QAD Web site has information about training classes and other services that can help you learn about QAD products.

Conventions

Typographic Conventions

This document uses the text or typographic conventions listed in the following table.

If you see:	It means:
monospaced text	A command or file name.
<i>italicized monospaced text</i>	A variable name for a value you enter as part of an operating system command; for example, <i>YourCDROMDir</i> .
indented command line	A long command that you enter as one line, although it appears in the text as two lines.
Note	Alerts the reader to exceptions or special conditions.
Important	Alerts the reader to critical information.
Warning	Used in situations where you can overwrite or corrupt data, unless you follow the instructions.

UNIX and Windows Conventions

This document supports the installation of Trade Management for both UNIX and Windows platforms. Some steps are unique to a particular platform and are documented in separate sections and marked as UNIX or Windows only. In steps that are common to UNIX and Windows, UNIX file and path conventions are used when needed. If you are installing on the Windows platform, substitute the drive letter and path conventions for your operating system.

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The background of the page is a grayscale image of several interlocking gears. The gears are of different sizes and are arranged in a way that they appear to be meshing together. The lighting is soft, creating a sense of depth and texture. The gears are the primary visual element, symbolizing the mechanical and systematic nature of the installation process.

Chapter 1

Planning a TrM Installation

This chapter presents basic topics that you should understand before beginning a Trade Management (TrM) installation.

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Planning an Installation

Trade Management (TrM) is a pricing and promotions application that covers the full spectrum of promotions, from planning through execution, administration, and evaluation. The application allows your company to manage fluid pricing activities effectively.

TrM runs in conjunction with MFG/PRO on Progress. TrM is typically deployed on the same server as your production MFG/PRO instance. This guide supports UNIX or Windows server installs, and character clients.

▶ See page 43.

Note If you are using Windows GUI clients, you must install several Windows-based TrM programs for certain MFG/PRO functions to run in Windows. These steps are documented in Chapter 4.

Important In order to convert from prior versions of Trade Management to version 2.6, contact QAD Services.

Installation Utilities

A large portion of the installation is managed by a QAD utility called MFG/UTIL. This product can be used for numerous database management tasks, both for the server and Windows clients.

After installation, you can access MFG/UTIL to perform maintenance, such as compilation and editing startup scripts or Windows client icons.

Keyboard Commands

Keyboard commands for MFG/UTIL are listed in Table 1.1.

Table 1.1
MFG/UTIL
Character Interface
Commands

Keyboard Entry	Command Name	Description
F1	Go	Moves to next frame or runs a program
F2	Help	Displays context-sensitive help (may not be available for all functions)
F3	Menu Bar	Accesses the menu bar
F4	End	Exits a frame, program, or menu
Spacebar	Select	Selects check boxes and on/off options

Keyboard Entry	Command Name	Description
Enter or Tab	Tab	Moves to next field or command
Shift+Tab or Control+U	Back Tab	Moves to the previous field or command

Note In the character interface, buttons appear within angle brackets: <OK>. To choose a button, Tab to the button and press Enter.

Log Files

You can refer to the following log files created by the installation utilities.

Utility	Log File Name	Directory Location
Installation script	install.log and mfgpro.log	Subdirectory /log under the installation target directory
MFG/UTIL	mfgutil.log	MFG/PRO installation directory

Note Each time MFG/UTIL runs a prolonged task, such as compiling or loading a .df file, it creates a new log file. The most recent log file is always called mfgutil.log. Older log files are named with the convention mfgutil.xxx, where xxx is a number from 001 through 999. The lower the number, the older the file. For example, these files are listed newest to oldest:

```
mfgutil.log
mfgutil.002
mfgutil.001
```

Prior to Installation

Complete these tasks before a Trade Management install:

- Set up the network.
- Set up services files for client/server connections if you have multiple hosts.
- Install any patches for your operating system.
- Install MFG/PRO.
- Install the latest Progress patches. These can be obtained from:

<http://www.progress.com/support>

Installing TrM

- Install the TrM server media.
- Create the empty TrM database.
- Create the TrM production database from the empty database and structure file.
- Load system data into the database.
- Configure new database sets—groups of databases started or stopped together with a single script.
- Generate server startup and shutdown scripts.
- Compile the application code.
- If you use Windows GUI clients, install the Windows files and compile them.
- Run several utilities to update data.
- Start MFG/PRO with TrM.
- Integrate TrM with MFG/PRO.
- Load TrM field help.

System Requirements

The TrM installation requires adequate system resources. This chapter provides system requirements and software prerequisites for the TrM server and the network.

General Requirements **12**

Database Server **12**

Network **13**

A TrM installation consists of a database server and TrM clients. It operates under MFG/PRO with the QAD Desktop.

General Requirements

The system administrator must be an experienced Progress database administrator with a minimum of 1-2 years experience and must know how to manage Progress client processes.

Database Server

The database server is a UNIX or Windows server that contains TrM source code and the TrM database.

Hardware Requirements

- 1 GB of free disk space
- High-speed 100 mbps network card
- ISO9660 CD-ROM or tape drive
- 2 disk controller channels (minimum)

Software Prerequisites

- Operating system patches
- Progress 9.1D, Service Pack 5+ Enterprise DB Server, licensed for the appropriate number of users
- Progress 9.1D Service Pack 5+ ProVision Plus
- QAD Desktop 2.4.2+
- MFG/PRO eB2 Service Pack 4+

▶ See “Installing MFG/PRO Patch for TrM” on page 39.

Note If you are using MFG/PRO eB2 with Service Pack 4, you must install an additional patch, included on the installation CD. If you are using a service pack higher than 4, such as Service Pack 5, this patch is already included in your MFG/PRO code and does not need to be applied.

Network

Set up your network to support Progress networking specifications. Minimum requirements from the TrM standpoint are:

- 10 Megabit (Mb) Ethernet or faster network

Server Install

This chapter describes the installation of Trade Management on the MFG/PRO database server.

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Preliminary Steps

Prior to install, review the following cautions and requirements:

- Set your \$TERM variable to a standard terminal type such as vt100 or vt200 while installing TrM.
- Create services on your servers for the TrM databases, `trmempty`, `trmprod`, and optionally `trmdemo`.
- Determine the following information:
 - The TrM installation directory where you want to install the TrM server files, referred to as *TrMInstallDir*
 - The Progress directory
 - The host name for the database server

Installing the TrM Server

In this set of steps, you mount the Database Server media and copy the files to the server. Choose the steps for the media you received.

Mount the CD-ROM (UNIX only)

- 1 Log on as `mfg`.
- 2 Mount the CD-ROM. Example commands are listed in Table 3.1.

Table 3.1
UNIX CD Drive
Mount Commands

Hardware	Mount Command
Sun	<code>volcheck cdrom</code>
HP	<code>/etc/mount -F cdfs /dev/dsk/YourCDDevice /cdrom</code>
Digital	<code>mount -r -o noversion -t cdfs /dev/YourCDDevice /cdrom</code>
AIX	<code>smitty mountfs</code> Then select file system, directory, and file system type (<code>cdarfs</code>).
Linux	<code>mount /dev/hdb /mnt/cdrom</code> Where <code>/hdb</code> could be <code>hdc</code> or <code>hdd</code> among other possibilities.
All others	Refer to your operating system documentation or vendor for requirements to mount a CD-ROM. You may be able to type <code>man mount</code> to determine the correct command.

- 3 Continue with “Install Database Server Files” on page 18.

Load Tape Media (UNIX Only)

Load the tape media into a temporary directory, then extract the TrM files from there into a permanent installation directory. All QAD tapes are written using a block size of 5120 bytes.

- 1 Log on as `mfg`.
- 2 Create a temporary directory.
- 3 Load your tape into the appropriate server drive.
- 4 Change to the temporary installation directory:

```
cd TemporaryTapeDir
```
- 5 Enter the applicable load command from Table 3.2.

On this type of hardware...	Enter this load command...
HP 9000/800 Series, 1/4" cartridge	<code>tcio -i /dev/rct/YourTapeDevice cpio -iumvdBc</code>
All others	<code>cpio -iumvdBc < /dev/YourTapeDevice</code>

Table 3.2
UNIX Tape Extract
Commands

- 6 Remove the tape and store it.

Installation Directory

Your selection of an installation directory for Trade Management can be important. If this is a new install, the easiest method and simplest to support is to accept the default that is parallel to the MFG/PRO installation directory (`MFGPROInstallDir`). If you choose another location, installation scripts will require manual updates when they are run.

On Windows, do not install to a directory with spaces such as `c:\Program Files\trm`. Some installation utility programs or logs may not recognize the full path.

Install Database Server Files

Complete this section to install the TrM database server files on your server.

- 1 In UNIX, log on as user `mfg` under the group `qad`. On Windows, log on as an Administrator.

- 2 On the CD, change to the directory containing the database server media. This is the temporary tape directory for tape installs.

- 3 Change to the `install` directory:

```
cd install
```

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

```
./install.ksh
```

In Windows, launch `install.exe` from the Windows Explorer.

A welcome screen displays. Press Enter.

```
Welcome to QAD's Trade Management 2.6 installation.
We are installing Trade Management 2.6 for Linux.
Press <Enter> to view license agreement.
```

- 5 Accept the software license agreement. Press Ctrl+C to jump to the end of the agreement.

```
Do you accept all the terms of the preceding License
Agreement?
If you choose no, the install will stop.

To install Trade Management 2.6, you must accept this
agreement. (y/n)?
Default is n
->y
```

- 6 You are prompted for a location for the log files. Accept the default or enter the installation log file location. If you enter a different log file location, make note of it for later installations.

```
Please enter the location where the log file should be
written.
Default is /home/mfg/instlog
->/home/mfg/instlog
```

On Windows systems, the default is `c:\instlog`.

This log directory is used to record information about this installation.

- 7 Enter the Progress installation directory path or accept the default. The script verifies the location and version. Specify Yes to confirm. The message Installing Trade Management displays.
- 8 Enter the MFG/PRO installation directory (*MFGPROInstallDir*).
- 9 Enter the path and directory where you want to install the Trade Management server files (*TrMInstallDir*). By default, the installation is to `/qad/trm`. In Windows, this is `c:\qad\trm`. If this directory does not exist, it is created.
The following message displays:

The character client is normally installed under the database server directory.
You are then asked to confirm the TrM installation directory.
- 10 On Windows system, enter the name for the folder to contain MFG/UTIL icons. By default, this is Trade Management 2.6.
- 11 Review the summary and confirm by entering `y` and pressing Enter.
- 12 When the files finish copying, press Enter to end the script.

Modify the Workflow .ini Files

Important Different TrM workflow files with different names may be installed with different eB2 service packs. Go to your *MFGPROInstallDir* and look for *wk0605.ini* and *wk0610.ini*. If you have these files in your install directory, delete them before proceeding.

The *wktrmdb.ini* file controls the Trade Management Guided Setup creation of empty, demo, and production databases; *wktrmcom.ini* compiles the TrM code. You may need to make the following changes to *wktrmdb.ini*; *wktrmcom.ini* should not require any changes.

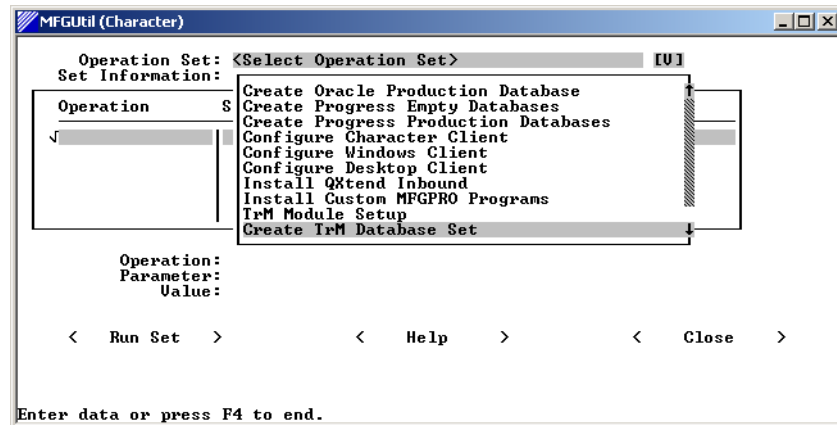
If needed, use a text editor to edit *wktrmdb.ini*:

- Uncomment the `trmdemo` database steps if you want to create a `trmdemo` database.
- Change directory locations if you chose a non-default installation directory for TrM.

Creating the TrM Databases

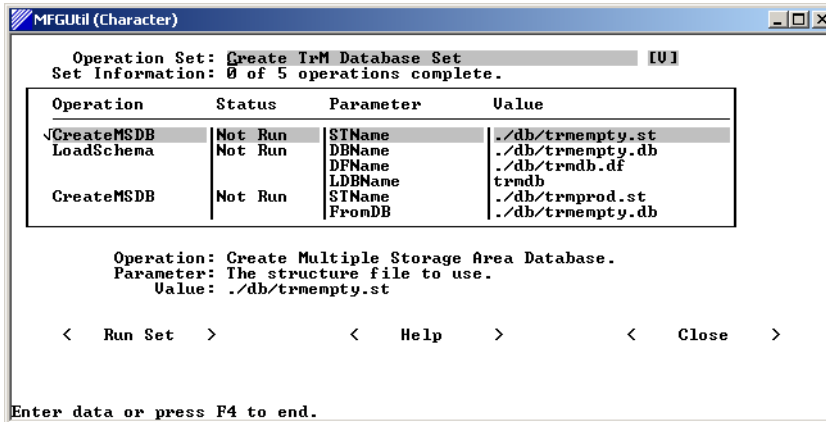
In the following section, you create the empty TrM production database from the default QAD structure files. You will then use the empty database as a template to build your production and demonstration databases.

- 1 Launch MFG/UTIL from *MFGPROInstallDir* using the following command: `./mfgutil`.
- 2 Choose MFG/PRO Guided Setup from the Configure menu.
- 3 Select Create TrM Database Set in the Operation Set list box.



The MFG/PRO Guided Setup program provides a workflow of the operations required to set up your TrM environment. You can use this program to access the different configuration utilities in MFG/UTIL with proper default information and in proper sequence. Review the following figure to become familiar with the Guided Setup screen.

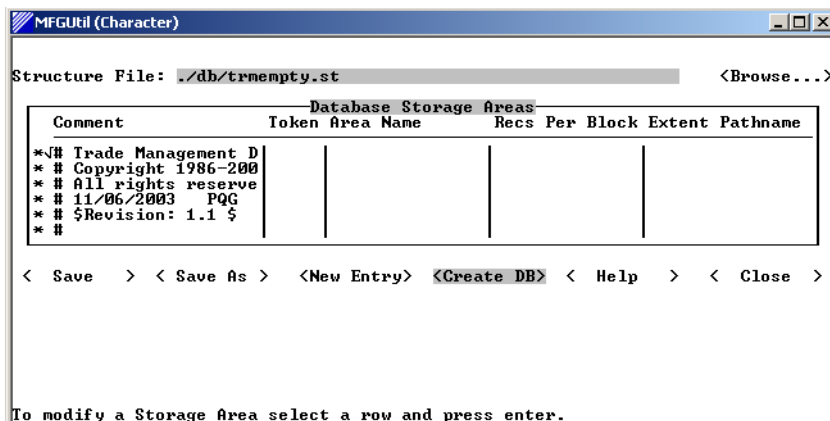
Note The number of operations is determined by the number of uncommented sections in *wktrmdb.ini*. See “Modify the Workflow .ini Files” on page 19 for information on configuring this file.



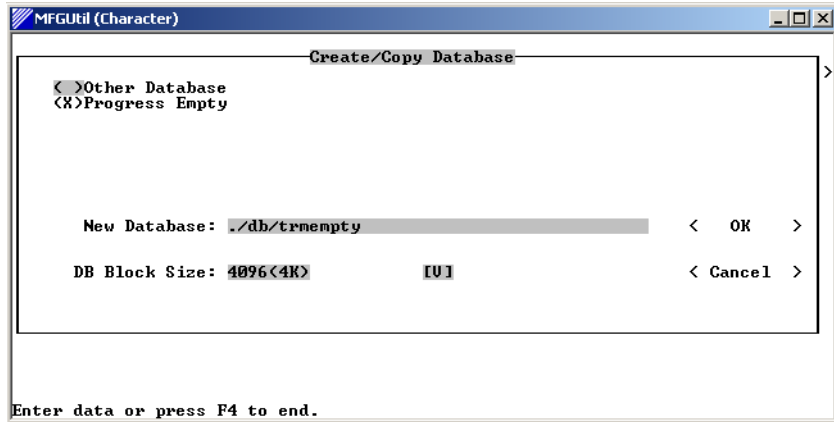
Operation sets are groups of installation activities. The operations in a set display in the Operation frame. On completion, the status changes to Done. If errors occur or if you cancel processing prior to completing a step, the status is Error. Below the Operation frame, the operation, the key variable required, and default value for that variable display.

If you stop the workflow and an Error status is written to a step, this is the first step run when you restart the operation set.

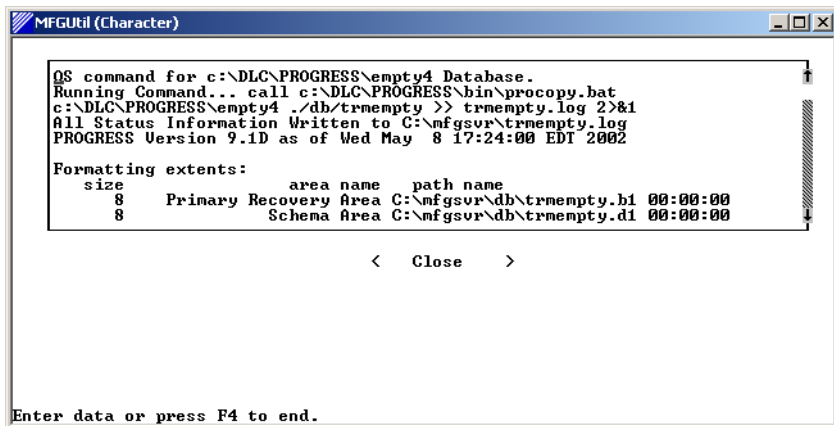
- 4 Choose Run Set and press Enter.
- 5 The QAD Database Builder screen displays with the default QAD empty structure file, `trmempty.st`. Generally, you do not need to edit this file for the empty databases. Choose Create DB.



- 6 In the Create/Copy Database screen, verify that Progress Empty is selected and accept the defaults in the New Database and DB Block Size fields.



- 7 Choose OK to build the main empty database, trnempty.
- 8 When trnempty is built, a log of the database build process displays. Choose Close to exit the log window.



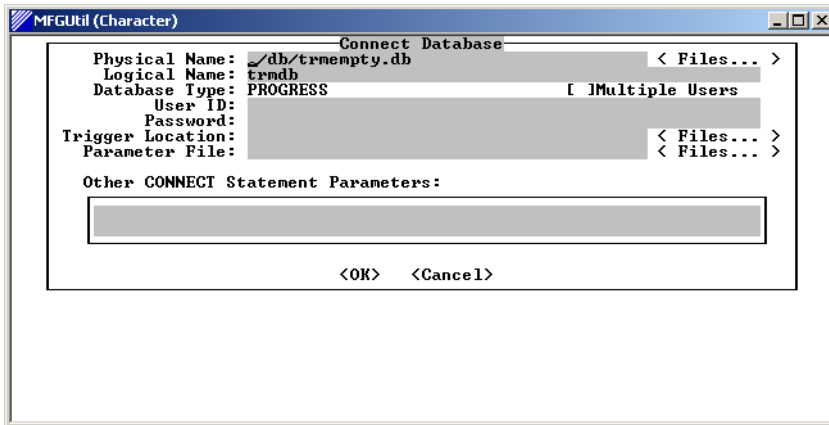
Load Schema in Empty Databases

The database schema consists of the sequences, tables, fields, and indexes in the database. In this task, you load the schema into the empty TrM database using a data definition file `trmdb.dfl`. The resulting database is used to build your main databases such as `trmprod` and `trmdemo`.

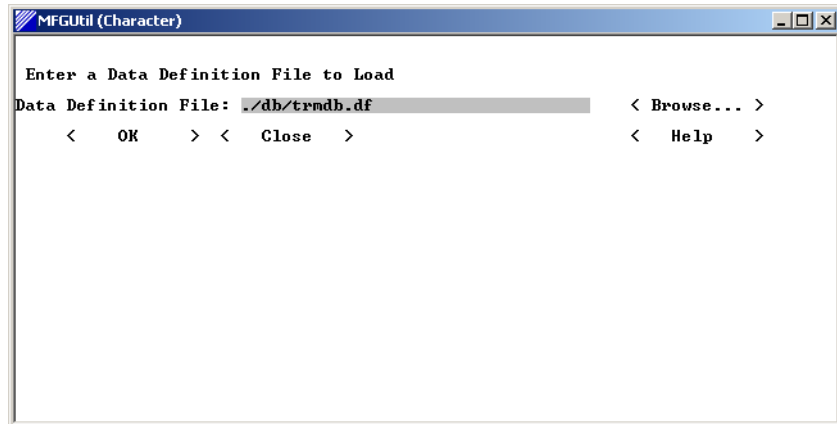
- 1 After you close the Edit Structure File/Create Database screen, the Connect Database screen displays. Accept the defaults and choose OK to connect to `trmempty`. Use Table 3.3 and the screen as guides.

Field	Value
Physical Name	Path to <code>trmempty (/db/trmempty.db)</code>
Logical Name	Logical database name (<code>trmdb</code>)
All other fields	Leave blank

Table 3.3
Connect Database
Values for
`trmempty`

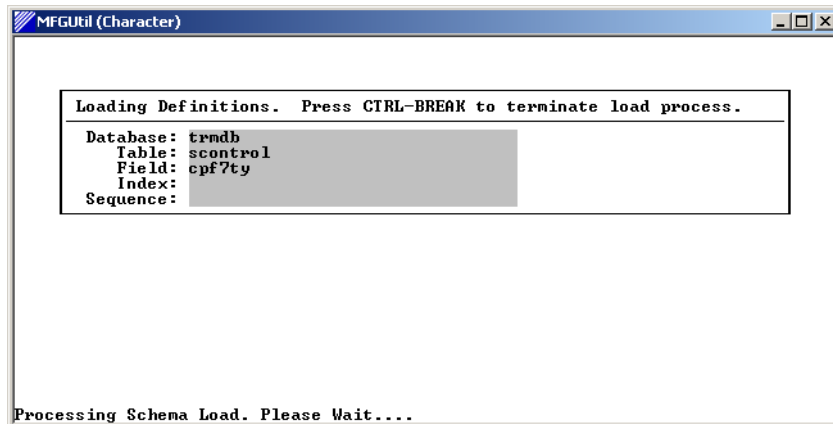


- 2 The default data definition file displays. Choose OK to begin loading the database schema.



The program first writes the schema to a buffer, then loads it into the database. The write displays a progress screen; the load process does not.

Important Due to Progress limitations in the character interface, almost half the load time you see the message, “Processing schema load. Please wait...”



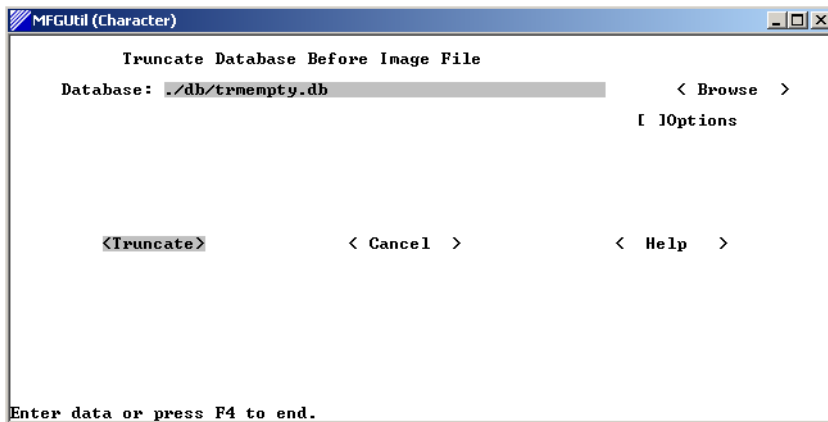
- 3 When the load completes, close the log window.

- 4 The Enter a Data Definition File to Load screen displays with the OK button selected. Press Enter to close the screen. An error stating you must be connected may appear. Choose OK in this error. The workflow continues correctly following the error.

Truncate Before-Image Files

You now truncate the empty database before-image (BI) files. These files contain data awaiting writes to the database. Truncation updates the file so that the database is fully synchronized and then deletes the temporary data, bringing the files back to their minimum size. Little has occurred to increase the size of your BI file at this point, but the synchronization is required prior to creating copies of these databases.

- 1 In the Truncate Database Before Image File screen, accept the default path to `trmempty` and choose Truncate.



- 2 Close the log window that displays on completion.
- 3 The workflow displays the Structure File Edit screen.

Create the Production and Demo Databases

In the next set of tasks, the empty databases and the default structure files are used to create your working databases. Cycle through the entire process for `trmprod` and `trmdemo`, if it remains in the workflow.

Edit the Structure Files

The Guided Setup starts with the production database. By default this is `trmprod`. The first step is editing the structure file if you choose. The Structure File Record Detail screen lets you edit the Storage Area Path and the Extent Size for fixed-length extents.

- Use the Extent Pathname to distribute your database onto drives to maximize performance and optimize disk access.
- Use the Extent Size on fixed-length extents to control the size of each storage area. (This field does not appear for variable-length extents.)

Note Most storage areas consist of two extents—one fixed length, the other variable to allow for growth.

Warning Do not edit the Comment line in a storage area. This converts the storage area definition to a comment and nullifies the storage area. To add a comment to the file, select a comment line (#) from the Database Storage Area selection list and press Enter.

Warning Do not change the storage Area Name. This name matches the Area definition in the Data Definition files (.dff) for the database. When Progress encounters data files without defined storage areas, it creates them in the System storage area, which is also used to maintain the structure of the database.

- 1 In the Structure File Edit screen, a structure file for the production database, `trmprod.st`, defaults in the Structure File field. The MFG/UTIL screen that displays lets you assign disk locations and sizes to your storage areas.

MFGUtil (Character)

Structure File: `./db/trmprod.st` <Browse...>

Comment	Token	Area Name	Recs	Per Block	Extent	Pathname
*√# Trade Management D						
* # Copyright 1986-200						
* # All rights reserve						
* # 11/06/2003 PQG						
* # \$Revision: 1.1 \$						
* #						

< Save > < Save As > <New Entry> <Create DB> < Help > < Close >

To modify a Storage Area select a row and press enter.

- 2 Modify any storage area by tabbing to the row and pressing Enter.

MFGUtil (Character)

Please Enter The Structure File Record Detail Mode: Modify

Comment: _____

Storage Area Token: `d - DB or Dn <Schema/Us [U]`

Area Name: `Transaction Area`

Records Per Block: `32 [U]`

Storage Area Path: `./db`

Extent Type: `Variable Len [U]`

< OK > < Cancel > < Delete >

Enter data or press F4 to end.

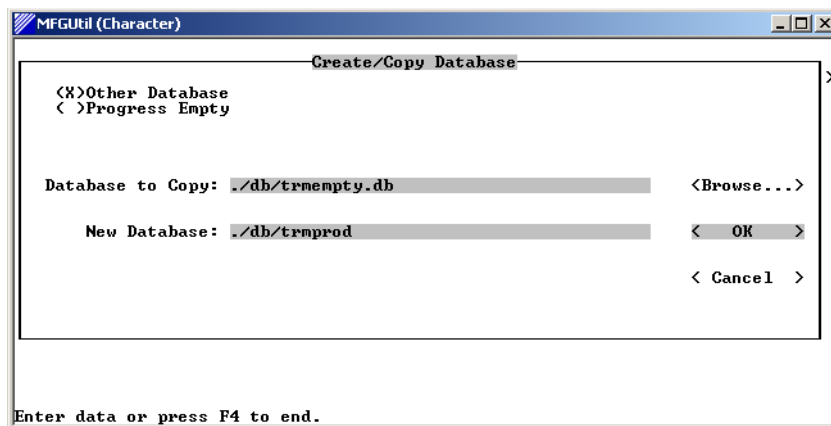
- 3 Edit the storage area definition. Typically you would edit only the Storage Area Path and Extent Size (on fixed-length extents).
- 4 Choose OK to save the edits.
- 5 Choose Create DB to save your entries and close the screen.

Build the Main Databases

In these next steps, you use the new `trmprod` structure file you configured and the empty databases to create the working databases.

- 1 The Create/Copy Database screen displays. Select Other Database and verify the path to `trmempty.db`. Choose OK.

The New Database name defaults from the `.st` file name. You can enter a different database name here if you choose.



- 2 When `trmprod` is built, a log of the database build process displays. Scroll through the log and verify that `trmprod` was created successfully. This information is also recorded in `trmprod.log` in the `MFGPROInstallDir`. When ready, choose Close to continue.
- 3 The Database Storage Areas screen displays with the Close button selected. Press Enter to close the screen.
- 4 If the demo database is in the workflow, that database is created here, following steps 1 through 3 in this section.

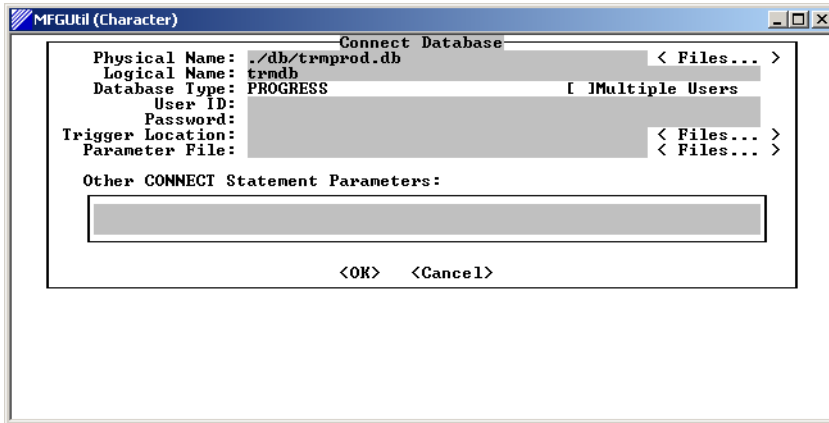
You now load the data for the production and demo databases.

Load System Data

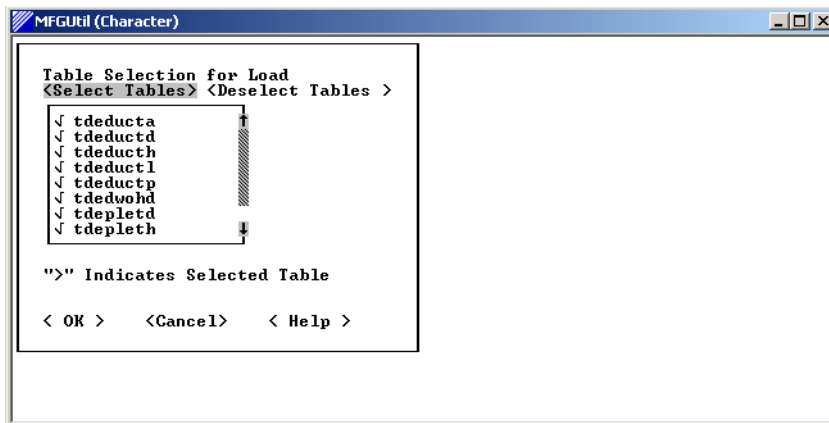
In this task, you load the default system data, such as menu and message files supplied by QAD, into each database.

▶ See “Modify the Workflow .ini Files” on page 19.

- 1 After the Database Storage Areas screen closes, the Connect Database screen displays. Accept the defaults to connect to the production database, `trmprod`. Choose OK.



- 2 The Table Selection for Load screen displays the data files in the `trmprod` database in the `TrMInstallDir/trmprod` directory. Choose OK to start the load.



3 The load displays a progress screen.

Table	Load file	Records Loaded	Total Errors	Expected Records
sfldinfo	.\trm\trmprod\sfldinfo.d	2247	0	2247
sfndfunc	.\trm\trmprod\sfndfunc.d	1176	0	1176
sgwdfmt	.\trm\trmprod\sgwdfmt.d	75	0	75
sgwfdsp	.\trm\trmprod\sgwfdsp.d	10	0	10
sgwlfmt	.\trm\trmprod\sgwlfmt.d	102	0	102
sgwseqs	.\trm\trmprod\sgwseqs.d	128	0	128
sgwtype	.\trm\trmprod\sgwtype.d	62	0	62
shlptxt	.\trm\trmprod\shlptxt.d	3084	0	3084
shlptpts	.\trm\trmprod\shlptpts.d	0	0	0
sinterfa	.\trm\trmprod\sinterfa.d	12	0	12
slangcde	.\trm\trmprod\slangcde.d	1	0	1
slangdsc	.\trm\trmprod\slangdsc.d	11565	0	11565
smessage	.\trm\trmprod\smessage.d	4876	0	4876
sopmendt	.\trm\trmprod\sopmendt.d	Loading	0	2666
sdftbls	.\trm\trmprod\sdftbls.d	0	0	0

4 When the load completes, press spacebar to continue.

5 If the demo database is in the workflow, those data loads occur here, following steps 1 through 4, from the directory *TrMInstallDir/trmdemo*.

6 When the steps are complete, you return to the Operation Set screen. Choose Close to complete the workflow.

Operation	Status	Parameter	Value
LoadData	Done	DBName LDBName DataDir	./db/trmprod.db trmdb ./trm/trmprod
√TruncBI	Done	DBName LDBName DBName	./db/mfgprod.db qaddb ./db/trmprod.db

Operation: Truncate DB BI file.
Parameter: The DB to truncate.
Value: ./db/trmprod.db

< Run Set > < Help > < Close >

Preparing Database Sets and Scripts

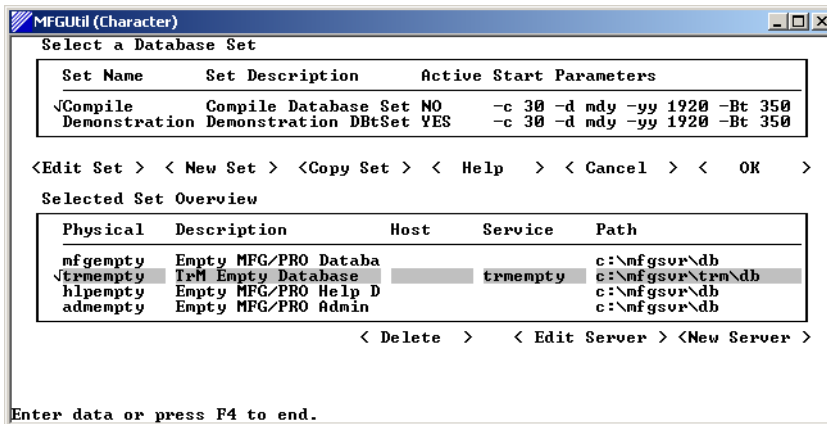
MFG/UTIL uses the concept of database sets to link your various databases together. Each database set you create in MFG/UTIL is then used to generate startup and shutdown scripts (UNIX) or shortcuts and initialization and parameter files (Windows) that start and stop servers and client sessions correctly, launching and closing all the related databases together.

You create database sets for each working database and compiles.

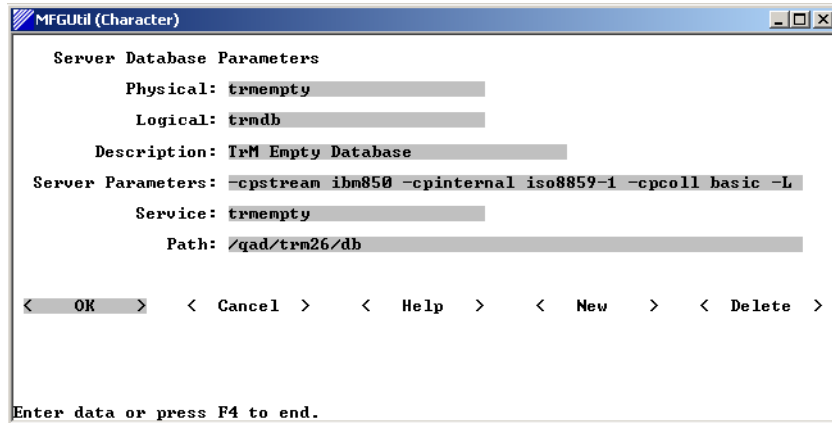
The following steps add the TrM databases to the appropriate MFG/PRO database sets, and then generate server start and stop scripts for those database sets.

Configure Database Sets

- 1 In MFG/UTIL, choose Configure Database Sets from the Configure menu.
- 2 Select the Compile database set in the top frame. Then Tab to the Selected Set Overview window. If a TrM database is displayed there, select it and choose Edit Server. Otherwise, choose New Server.



- 3 The Server Database Parameters screen displays. Verify the entries using the screen and field descriptions.



```

MFGUtil (Character)
Server Database Parameters
Physical: trmempty
Logical: trmdb
Description: TrM Empty Database
Server Parameters: -cpstream ibm850 -cpinternal iso8859-1 -cpcoll basic -L
Service: trmempty
Path: /qad/trm26/db
< OK > < Cancel > < Help > < New > < Delete >
Enter data or press F4 to end.

```

Physical. Enter the physical database name. For the Compile database set, this is trmempty.

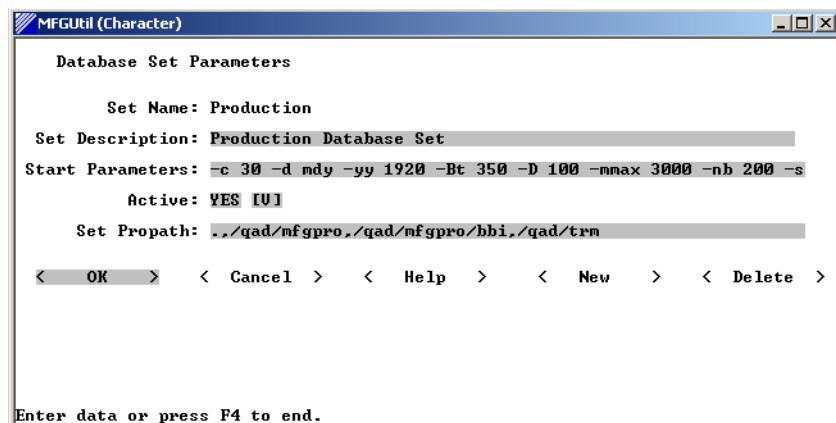
Logical. Enter the logical database name for trmempty.

Service. Enter the service name as set up in your services file.

Path. Enter the full path to the database.

When you finish, choose OK.

- 4 Tab to the top frame again. With the Production database set selected, choose Edit Set. Add the *TrMInstallDir* to the PROPATH and choose OK.

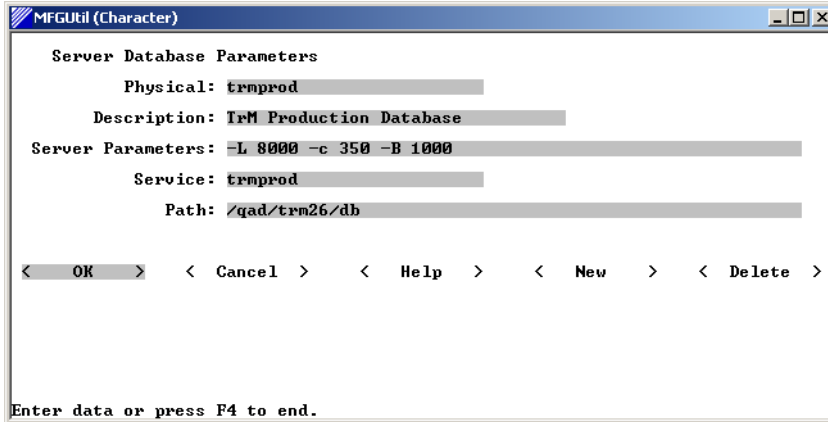


```

MFGUtil (Character)
Database Set Parameters
Set Name: Production
Set Description: Production Database Set
Start Parameters: -c 30 -d mdy -yy 1920 -Bt 350 -D 100 -nmax 3000 -nb 200 -s
Active: YES [U]
Set Propath: ../qad/mfgpro./qad/mfgpro/bbi./qad/trm
< OK > < Cancel > < Help > < New > < Delete >
Enter data or press F4 to end.

```

- 5 Tab to the Selected Set Overview and choose New Server. The Server Database Parameters screen displays. Verify the entries using the screen and field descriptions.



Server Database Parameters

Physical: `trmprod`

Description: `TrM Production Database`

Server Parameters: `-L 8000 -c 350 -B 1000`

Service: `trmprod`

Path: `/qad/trm26/db`

< OK > < Cancel > < Help > < New > < Delete >

Enter data or press F4 to end.

Physical. Enter the physical database name. For the Production database set, this is `trmprod` by default.

Service. Enter the service name as set up in your `services` file.

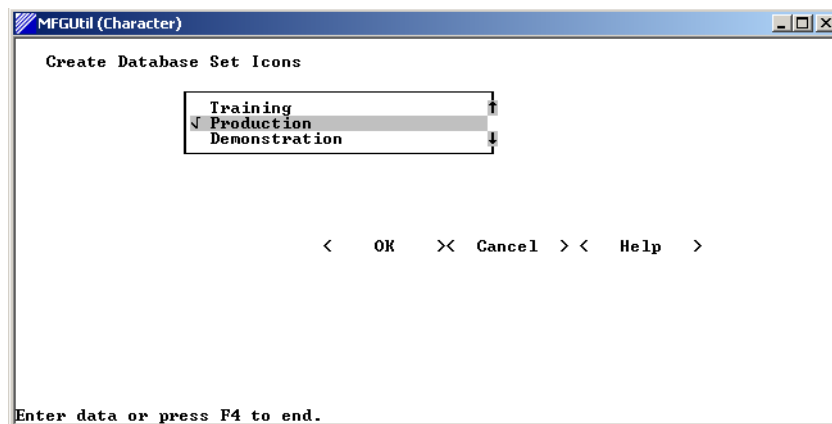
Path. Enter the full path to the database.

When you finish, choose OK.

- 6 Update the Demonstration database set in the same way if you created the TrM demo database.
- 7 When you complete the configuration of all applicable database sets, return to the main Database Set Maintenance window and choose OK to save your work.

Generate Scripts

- 1 In MFG/UTIL, choose Generate Scripts from the Scripts menu.
- 2 Select the Production database set and Demonstration if required, and choose OK. The Compile database set does not require a start script since it is only used during compiles.



- 3 You are asked to confirm the script generation. Choose Yes.
- 4 The log window displays progress. When the process completes, choose Close.

Compiling TrM Code

A full compile of TrM code is required. Compiling a source file creates an object file with the same name and the `.x` extension. Compiled programs are saved into a subdirectory using the first two letters of the program name. This subdirectory is located below the two-letter language code directory below `TrMInstallDir`. For example, `aiapprov.p` compiled for U.S. English is placed in `TrMInstallDir/us/ai`.

Set the Correct PROPATH

When configuring database sets using MFG/UTIL, a value defaults to the PROPATH field. Depending on the specific system configuration, the default value may not be correct. Continuing an MFG/UTIL operation without updating an incorrect value will cause unforeseen errors. Typically, the PROPATH value defaults from the value defined in the Set Paths for MFG/PRO and MFG/UTIL screen from the MFG/UTIL Configure menu.

Note the following points when working with MFG/UTIL:

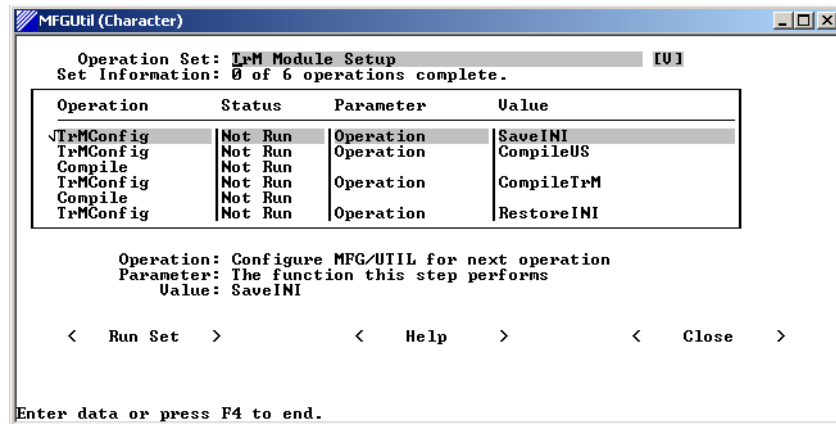
- In MFG/UTIL, select Configure|Set Paths for MFG/PRO and MFG/UTIL. Review and update the values as needed.
- When using MFG/UTIL to generate any script or complete any task, always carefully review the PROPATH values displayed for each screen you access.
- When working with database sets, verify the PROPATH for each database in the Database Set Parameters screen. Access this screen by choosing Edit in the Select a Database Set screen.
- The typical PROPATH for a new TrM installation includes these directories in this order:
 - a The current directory (.)
 - b The directory where the client code was installed (/qad/trm), and two if its subdirectories: /qad/trm/us and /qad/trm/us/xrc.
 - c The xrc directory

Example `./, /qad/trm, /qad/trm/us, /qad/trm/us/xrc, /qad/trm/xrc`

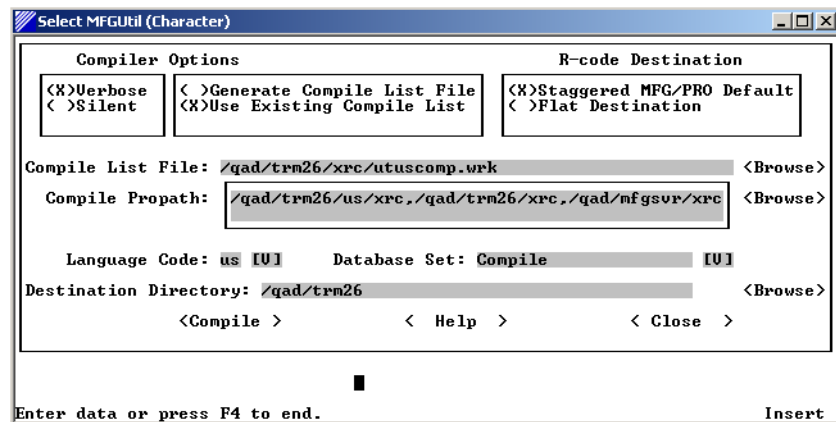
Compile TrM

TrM is compiled in two passes, each pass controlled by a compile list file. The first pass uses `utuscomp.wrk`, the second, `utcompil.wrk`. Both passes through the compile program are controlled with a second TrM workflow in MFG/UTIL.

- 1 Launch MFG/UTIL from the *MFGPROInstallDir* using the following command: `./mfgutil`.
In Windows, click the MFG/UTIL icon.
- 2 Choose MFG/PRO Guided Setup from the Configure menu.
- 3 Select TrM Module Setup in the Operation Set list box and choose Run Set.



- 4 The first step in the workflow is to resave the `mfgutil.ini` file. The purpose of this step is to update MFG/UTIL with TrM values.
- 5 The log window displays progress. Choose Close on completion.
- 6 The Compiler Options screen then displays automatically. Use the screen example and field descriptions to select compile options. The Compiler Options in the upper left of the screen let you set feedback levels and select a compile list.



Verbose. MFG/UTIL displays compile information on the screen and writes it to the MFG/UTIL log file (`mfgutil.log`). During the compile, the following information displays:

- Date and time

- Percentage of the compile completed
- Path and name of the program currently compiling
- Number of compile errors that occur

The log file is in the directory from which MFG/UTIL was launched.

Silent. MFG/UTIL writes to `mfgutil.log` only.

Generate Compile List File. Generates or regenerates a file listing the programs to compile. When you select this option, the Generate Compile List screen displays.

Use Existing Compile List File. Use this option for most cases. This uses the compile list shipped with the product.

Staggered MFG/PRO Default. Saves compiled code in the default structure of language directories underneath `TrMInstallDir`.

Flat Destination. Select this option to save the compiled code in a single destination directory.

Compile List File. Specify the name of the compile list file, by default `usutcomp.wrk`. If the file is located in a directory other than the one from which MFG/UTIL was launched, include the directory path and the file name.

Compile Propath. The compile PROPATH for this compile must contain:

- The `xrc` subdirectory in `TrMInstallDir/us`
- The `xrc` subdirectory in `TrMInstallDir`
- The `xrc` subdirectory in `MFGPROInstallDir`

Language Code. If you selected Staggered MFG/PRO Default option, enter the language code where you want the code saved.

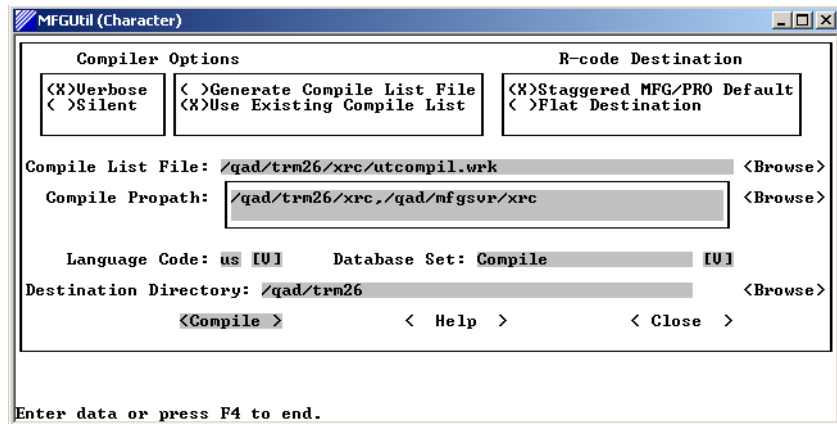
Database Set. The database set against which to compile.

Destination Directory. Specify the directory where you want compiled code saved. This is typically the `TrMInstallDir`. If Staggered MFG/PRO Default is selected, the compile places compiled code in

the appropriate language directory beneath this directory and within two-letter directories beneath that. For example, a U.S. English `aiapprov.p` is compiled to:

```
./TrMInstallDir/us/ai/aiapprov.r
```

- 7 When ready, choose Compile.
- 8 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.
- 9 When the compile is complete, check for errors in the log window, and choose Close.
- 10 The next compile displays. The correct settings are as shown. Note the following altered fields.



Compile List File. This should be `utcompil.wrk` located in the `xrc` subdirectory in `TrMInstallDir`.

Compile Propath. The compile PROPATH for this compile contains:

- The `xrc` subdirectory in `TrMInstallDir`
- The `xrc` subdirectory in `MFGPROInstallDir`

- 11 Choose Compile to start the compile.
- 12 In the compile verification screen, verify the compile information and choose Continue.

- 13 When the compile is complete, check for errors in the log window, and choose Close.
- 14 The `mfgutil.ini` file is saved again and the workflow ends. Choose Close to exit the log window. Choose Close again to exit the Guided Setup program.

This completes the TrM compile.

Installing MFG/PRO Patch for TrM

In order to successfully establish connections with the TrM database after installing Release 2.6 of Trade Management, you must install a patch that updates one include file (`ifapmcon.i`) in the MFG/PRO eB2 source.

Note This issue applies to installations with MFG/PRO eB2 Service Pack 4 and has been fixed in MFG/PRO eB2 Service Pack 5. If you have installed Service Pack 5, this installation step can be omitted.

- 1 Mount the TrM 2.6 CD.
- 2 Locate the `MFGPRO_PATCH` directory on the TrM 2.6 CD. This directory contains:

`/src/ifapmcon.i`. Unencrypted source of the include file that must be replaced in your current MFG/PRO installation.

`/xrc/ifapmcon.i`. Encrypted source of the include file that must be replaced in your current MFG/PRO installation.

`fixtrm.wrk`. A list of files that must be compiled after you copy the include file.

`ReadMeTrMPatch.txt`. A document with patch installation instructions.

- 3 Copy `ifapmcon.i` from the CD to your `MFGPROInstallDir`.

If you have encrypted source only, copy `/xrc/ifapmcon.i` from the CD to your `MFGPROInstallDir/xrc` directory, replacing the version of the file you currently have.

If you have unencrypted and encrypted source, copy both `/xrc/ifapmcon.i` and `/src/ifapmcon.i` to the associated directories in `MFGPROInstallDir`.

▶ See “Mount the CD-ROM (UNIX only)” on page 16.

- 4 Copy `fixtrm.wrk` to `MFGPROInstallDir`.
- 5 Launch MFG/UTIL from `MFGPROInstallDir` using the following command:

```
./mfgutil
```

In Windows, click the MFG/UTIL icon.

- 6 Choose Programs|Compile Procedures in MFG/UTIL.
- 7 Review the options in the Compiler Options screen.
 - a Enter the correct compile list file name, `fixtrm.wrk`.
 - b Review and update the compile PROPATH. Specify the PROPATH for compiling MFG/PRO code, not TrM code. The typical PROPATH for an MFG/PRO installation includes these directories in this order:

- The current directory (.)
- The directory where the client code was installed
(`c:\mfgsvr`)
- The `xrc` directory

Example `.,c:\mfgsvr,c:\mfgsvr\xrc`

- c Choose your TrM compile database set.
 - d Review the destination directory.
- 8 Choose Compile. Verify the compile information, then choose Continue to compile the code.

Additional Optional Setup

TrM uses a method of accessing database information that may leave certain records in a locked state for extended periods. This situation can be avoided by enabling a function to release these locks.

This function is disabled by default since enabling it can impact performance for each affected database table. QAD recommends that you enable the record release function only for tables where locking could cause a significant problem.

▶ See “Compile TrM” on page 35 for details about compiler options.

Use the following steps to enable the record release function.

Prerequisites

- Access to the Progress editor
- Knowledge of Progress commands
- The location of the MFG/PRO and TrM encrypted code
- The location of the MFG/PRO database .pf file

Compile Programs for Record Locking

- 1 From an MFG/PRO session with the Trade Management database connected, access the Progress editor.
- 2 Create a database alias for database `trmprod` using the command:

```
create alias proc for database trmprod
```
- 3 Add the location of the encrypted source to the `PROPATH` using the command:

```
PROPATH = PROPATH + ",MFGPRO_XRC_Directory,  
TrM_XRC_Directory"
```

- 4 Use the application compiler to compile the triggers directory:
 - a From the Progress Editor, choose Tools|Application Compiler.
 - b Delete the “.” directory from the compile list.
 - c Add the `<TrMInstallDir>/triggers` directory to the compile list.
 - d Press Go to compile the code.
 - e When the compile finishes, exit the Progress editor.
- 5 Using a command window, access the TrM installation directory.
- 6 Using operating system commands, copy:

```
TrMInstallDir/xrc/triggers/*.r
```

To:

```
TrMInstallDir/triggers
```

Update the Database Configuration File

- 1 Open the MFG/PRO .pf file for editing with a text editor.
- 2 Add the following directory to the `trmprod` database entries:

```
-trig TrMInstallDir
```

Enable the Unlocking Function

After you have prepared the locking programs and modified the environment, you must enable the function for selected database tables using a supplied program. Follow these steps:

- 1 From the Progress editor, run `triggers\trigupd.p`.
- 2 Select the tables you want to enable. An asterisk (*) indicates selection.
- 3 Press Go to execute the update. Automatic unlocking is applied to all selected tables.
- 4 Quit from the Progress editor.

This completes the optional setup.

Setting Up TrM with MFG/PRO for Windows

This chapter describes installing TrM clients to run with MFG/PRO in Windows mode.

Character and Windows Programs **44**

Task Summary **44**

Loading TrM Windows Files **44**

Compiling TrM Windows Programs **48**

Setting Windows Client PROPATH **49**

Character and Windows Programs

Since TrM is a character-based application, several Windows-based TrM programs are required in order for certain MFG/PRO functions to run in Windows.

For example, the MFG/PRO invoice post function, which can be run in either character or Windows mode, interacts with the TrM database. The TrM Windows programs must have the same functionality as the character programs.

Task Summary

The main tasks are:

- Loading the TrM Windows programs from the media
- Compiling the TrM Windows programs
- Setting the client PROPATH

Loading TrM Windows Files

These instructions assume you have already installed MFG/PRO eB2 for Windows on the file server.

- 1 Start on a PC that is connected to your network file server and has a CD-ROM drive. Insert the TrM GUI CD-ROM into the CD-ROM drive.
- 2 Run the program `install.exe` from the CD-ROM using the method appropriate to your version of Windows. A welcome screen displays.

```
c:\WINNT\System32\cmd.exe - install.exe
Welcome to QAD's Trade Management 2.6 GUI installation.
We are installing Trade Management 2.6 GUI for MSWin32.
Press <Enter> to view license agreement. _
```

- 3 Press Enter to continue. The TrM license agreement displays.

```
c:\WINNT\System32\cmd.exe - install.exe
-----
IMPORTANT - Please read carefully BEFORE you install, copy or otherwise use the
software products in this package.
-----
1. The Software Product bearing the trademark MFG/PRO ("Software") is the
property of QAD Inc. It is protected by copyright laws and international copy
right treatise as well as other intellectual property law and treatise. The
Software is licensed, not sold.
2. You are granted a license to install, copy or otherwise use this Software if
and only if
<i>i)</i> you have signed a Software Product License Agreement with QAD Inc <or any
of its subsidiaries), or
<i>ii)</i> you have signed an end-user agreement with one of our authorized
distributors. The end-user agreement you have signed must contain QAD's
Licensing Provisions as an integral part of the agreement. Our
distributors are not authorized to amend the terms of the Licensing
Provisions. A copy of QAD's Licensing Provisions in English can be found
in this package for your reference. <Please see footnote *>
3. Other than the circumstances described in paragraph 2 above, you have no
-- More --
```

- 4 Press Ctrl+C to skip to the end of the agreement. Accept the agreement. You are asked to provide a log file location. By default this is c:\instlog. This is also the default for MFG/PRO eB2. If

you used this location for MFG/PRO, the script reads in the install locations you used during that installation. Enter or accept the log file location and press Enter to continue.

```

C:\WINNT\System32\cmd.exe - install.exe

Do you accept all the terms of the preceding License Agreement?
If you choose no, the install will stop.

To install Trade Management 2.6 GUI,
you must accept this agreement. <y/n>?
Default is n
->y

Please enter location where the log file should be written.
Default is c:\instlog
->_

```

- 5 Enter or accept the Progress install directory. Press Enter.
- 6 Enter or accept the MFG/PRO install directory. Press Enter.
- 7 Enter or accept the TrM install directory. By default, this is your MFG/PRO install directory. Press Enter.

If the directory does not exist, you are asked to confirm its creation.

```

C:\WINNT\System32\cmd.exe - install.exe

Enter PROGRESS installation directory:
Default is c:\DLC\PROGRESS
->
Installing Trade Management 2.6 GUI

Please enter the directory where the database server was installed.
Default is c:\mfgsvr
->

Please enter the destination location for this installation
Default is c:\mfgsvr\gui
->
Directory c:\mfgsvr\gui does not exist.
The character client is normally installed under the database server directory.
Create c:\mfgsvr\gui and install there?
Default is y
->y

```

- 8 You are then asked to enter a folder name for the MFG/UTIL icons. Enter a new one or accept the default and press Enter to continue.

- 9 A summary displays. Enter n to re-enter the installation values. Enter y and press Enter to continue.

```

C:\WINNT\System32\cmd.exe - install.exe
Platform is MSWin32.
Product is Trade Management 2.6 GUI.
Database type is Progress.
Progress directory is c:\DLC\PROGRESS.
Language directory is us
Installing from D:.
MFG/PRO Database Server is located in c:\mfgsvr.
Destination location is c:\mfgsvr\gui.
MFGUtil icons will be in Trade Management 2.6 GUI
Trade Management 2.6 GUI will be in C:\Documents and Settings\All Users\Start Me
nu\Programs

Proceed using these values? (y/n)
Default is y
->y_

```

- 10 The TrM files are copied to the appropriate directories. The name and location of the log file displays on completion.

```

C:\WINNT\System32\cmd.exe - install.exe
to c:\mfgsvr\gui\src
Copied D:\trm\src\ifapm008.p
to c:\mfgsvr\gui\src
Copied D:\trm\src\ifapm007.p
to c:\mfgsvr\gui\src
Copied D:\trm\src\ifapm006.p
to c:\mfgsvr\gui\src
Copied D:\trm\src\ifapm005.p
to c:\mfgsvr\gui\src
Copied D:\trm\src\ifapm004.p
to c:\mfgsvr\gui\src
Copied D:\trm\src\ifapm003.p
to c:\mfgsvr\gui\src
Copied D:\trm\src\ifapm002.p
to c:\mfgsvr\gui\src
Copied D:\trm\src\ifapm001.p
to c:\mfgsvr\gui\src
Copied D:\trm\src\guilist
to c:\mfgsvr\gui\src
110 files copied.

Log written to c:\instlog\mfgchrc1.log
Press <enter> to end script.

```

- 11 Press Enter to end the script.

Compiling TrM Windows Programs

- 1 Select the Program menu in MFG/UTIL and choose Compile Procedure Files.
- 2 Use the following field descriptions to enter the correct values.

Verbose. Select Verbose to display the MFG/UTIL compile information on the screen and write it to the MFG/UTIL log file (`mfgutil.log`). During the compile, the following information displays:

- Date and time
- Percentage of the compile completed
- Path and name of the program currently compiling
- Number of compile errors that occur

The log file is in the directory from which MFG/UTIL was launched.

Silent. MFG/UTIL writes to `mfgutil.log` only.

Use Existing Compile List File. Select this option. The compile list for TrM is `utusc comp.wrk`.

Staggered MFG/PRO Default. Select this option. This saves compiled code in the default structure of language directories underneath `MFGPROInstallDir`.

Compile List File. Specify the name of the compile list file: `utuscomp.wrk`. The file is located in the `MFGPROInstallDir\gui\us\src` directory.

Compile Propath. The compile PROPATH must contain:

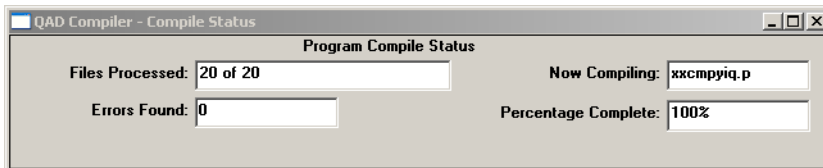
- `MFGPROInstallDir\gui\us\src`
- The `xrc` subdirectory in `MFGPROInstallDir`

Language Code. US.

Database Set. Compile.

Destination Directory. Specify the directory where you want compiled code saved. This is `MFGPROInstallDir\gui`.

- 3 Click Compile.
- 4 You may see one or more messages asking whether to overwrite existing directories. Answer Yes.
- 5 A summary screen displays. Verify the settings and choose Continue. The compile starts.



- 6 When the compile is complete, close the log window.

Setting Windows Client PROPATH

- 1 Use a text editor to open `Progress.vga` or `Progress.svg` in the Windows client working directory.
 - `Progress.vga` is for screen resolutions of 640 x 480.
 - `Progress.svg` is for screen resolutions of 800 x 600.
- 2 In the lines labeled PROPATH, under section [Startup], add the path to the TrM Windows install directory.

- 3 In the lines labeled PROPATH, under section [Startup], move the elements so that the path to the TrM Windows install directory is before the MFG/PRO install directory.

```
...,c:\mfgsvr\trm, ...,c:\mfgsvr
```



Chapter 5

Completing the Installation

Use the instructions in this chapter to complete the installation and integrate TrM with MFG/PRO so that users can run TrM from the MFG/PRO menu. These steps must be completed for both `trmprod` and `trmdemo`.

Running MFG/PRO Utilities **52**

Setting Up MFG/PRO **53**

Loading TrM Field Help **55**

Setting Up TrM Control **56**

Restarting Applications **56**

Running MFG/PRO Utilities

Before using MFG/PRO, you must run two utilities:

- Run a language code utility from the Progress Editor.
- Run a utility to load data in the MFG/PRO administration database.

Note If you created a TrM demo database, you must repeat these steps in it.

Run the Language Code Utility

TrM supports English language installations only. Because of this, language codes were not built into the product and MFG/PRO cannot access TrM. In order to create a language code of US in the TrM database, the `utlngcnv.p` utility must be run.

- 1 Start an MFG/PRO character session.
- 2 From the main menu, press End. You are prompted to confirm exit. Enter P at the confirmation prompt to access the Progress Editor:

```
please confirm exit P
```
- 3 In the Progress Editor, enter the following command:

```
run ut/utlngcnv.p
```
- 4 Choose Run from the Compile menu or press Go.
The utility runs for a few minutes, then you are returned to the Editor.
- 5 Choose Exit from the File menu to close the Editor and return to MFG/PRO.

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 In any menu in MFG/PRO, type in the full utility program name in the command line:

```
uttrmld.p
```

- 2 A screen displays with a single field where the source directory for the data load should appear. The directory is:

```
/qad/trm/us/mfg
```

- 3 Press Go to initiate the load.
- 4 Once the /mfg load is complete, a screen displays with a single field where the source directory for the data load should appear. The directory is:

```
/qad/trm/trmprod
```

- 5 Press Go to initiate the load.

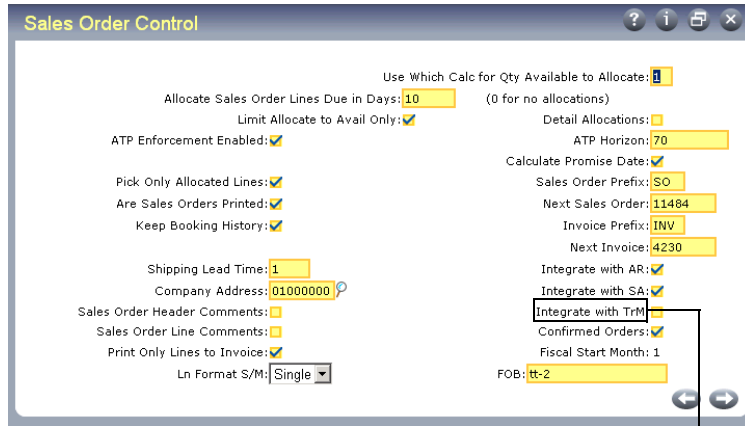
Setting Up MFG/PRO

You must complete the following steps to prepare MFG/PRO for use with TrM:

- Modify Sales Order Control.
- Modify Pricing Control.
- Set up data for use with the MFG/PRO payment/deduction functions.

Update MFG/PRO Sales Order Control

- 1 Start an MFG/PRO client session in character mode.
- 2 In MFG/PRO Sales Order Control (7.1.24), set the Integrate with TrM field to Yes.
- 3 Press Go to save this change. Then press End until you have exited Sales Order Control.



Set this field to Yes to complete the installation process.

This will enable you to access TrM from an MFG/PRO character session. Further initial setup instructions are provided in Chapter 4 of *User Guide: Trade Management*.

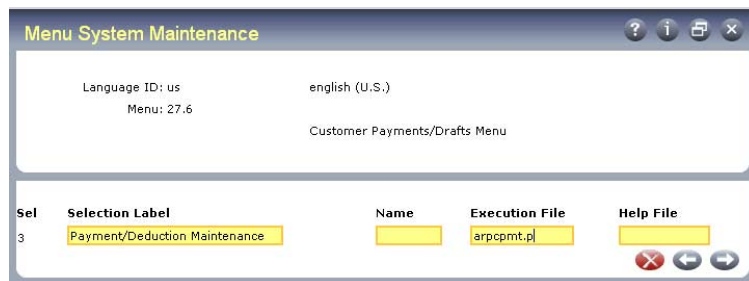
Update MFG/PRO Pricing Control

In MFG/PRO Pricing Control (1.10.1.24), enter a TrM price list prefix and set the QO and SO Price by Line fields to Yes.

Update MFG/PRO Data for Payments/Deductions

To use the MFG/PRO payment deductions features added by TrM, you must update menus and add lookups.

- 1 Use Menu System Maintenance (36.4.4) to add three menu items to the MFG/PRO Customer Payment/Drafts menu. The specific locations mentioned in these instructions are suggestions only.



Suggested Location	Selection Label	Executing File
27.6.3	Payment/Deduction Maintenance	arpcpmt.p
27.6.7	Customer/Payment Center Link	arpcmt.p
27.6.8	Customer /Payment Center Inquiry	xxcmpyiq.p

- 2 Use Drill Down/Lookup Maintenance (36.20.1) to set up thirteen lookup records.

Field Name	Description	Procedure to Execute	Window Starts at Row	Lines in Windows
vs_reas_code	Reason Code	swreas.p	7	6
h2-bank	Bank	gplu311.p	7	6
h7-ard-acc	Account	gplu309.p	7	6
h7-ard-cc	Cost Center	gplu059.p	7	6
h7-ard-entity	Entity	gplu322	7	6
h7-drsn-code	Reason Code	swreas.p	7	6
pyck_acct	Account	gplu309.p	7	6
pyck_cc	Cost Center	gplu059.p	7	6
pyck_entity	Entity	gplu322.p	7	6
pyck_disc_acct	Account	gplu309.p	7	6
pyck_disc_cc	Disc Cost Center	gplu059.p	7	6
sh1-batch	Batch	gplu038.p	7	6
sh2_payctr_cust	Bill-To	gplu036.p	7	6

Loading TrM Field Help

Use Field Help Load (36.4.19) to install the `fieldhlp.fhd` file containing new TrM procedure and field help. The `fieldhlp.fhd` file is located in the `TrMInstallDir` root directory.

- 1 In Field Help Load (36.4.19), enter the following field values:

Language. Enter the appropriate two-letter language code; for example, US for English.

Field, Procedure, Status, Text Type. Leave blank.

Field Help Load File. Enter the full path to the `fieldhlp.fhd` file.

Skip loading help with lower status. Enter Yes.

- 2 Press Go to load the help file into the MFG/PRO database.

Setting Up TrM Control

Trade Management must be integrated with MFG/PRO prior to adding or updating any records.

- 1 In MFG/PRO, go to TrM Control (7.20.19.1).
- 2 The Control ID defaults to 1. Press Go once to enter the program.
- 3 Press Page Down to access page 10.
- 4 Change MFG/PRO? to Yes to integrate with MFG/PRO.
- 5 Press F1 to save; press F4 to exit.

Restarting Applications

Restart both TrM and MFG/PRO so that the MFG/PRO startup routine can run the TrM interface program.

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