



QAD Enterprise Applications  
Standard Edition

# Installation Guide

# QAD Kanban Sizing Workbenches

Installation Introduction  
Installation

78-0944A  
Kanban Sizing Workbenches version 1.1.0  
QAD Standard Edition 2008, 2008.1, 2009  
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# 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**

Describes tasks that you should perform before you begin installation.

## Overview

This document provides instructions for installing the Kanban Sizing Workbenches (Kanban Sizing Workbench and Kanban Process Workbench) for QAD Standard Edition, versions 2008, 2008.1, and 2009.

**Important** Installing this package in your environment will render your currently installed HTML Kanban Workbench function unusable. The .NET Kanban Sizing and Kanban Process workbenches installed with this package will as such be a replacement of the HTML Kanban Workbench (shown below).

**Fig. 1.1**  
Previous HTML Kanban Workbench

## Prerequisites

- One of the following installed versions of QAD Standard Edition (SE): 2008, 2008.1, or 2009
- .NET UI 2.9.1 or 2.9.4
- Progress databases

**Note** Oracle databases are not supported at this time.

- Minimum Progress versions to run the workbenches:
  - OE10.1C04
  - OE10.2A02
  - OE10.2B

**Note** These Progress versions are required because they contain the Cancel All Requests fix. See “Unzip the plug-in zip file contained in the installation directory by typing:” on page 11 for more information on the Cancel All Requests fix.

- Active QAD license for the Lean Manufacturing module

**Important** Please be aware that even if you meet the prerequisites listed in this section, the installation package does contain 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.

## Processor Consideration

Depending on search criteria used and amount of data saved with the workbenches, one processor (core) per workbench user might be consumed for an extended period of time. QAD recommends that you monitor this situation and allocate a processor (core) per user where there is core (processor) consumption for a longer period of time on a regular basis.

## Installation Package

There are two packages provided for the workbenches for:

- Encrypted 4GL
- Unencrypted 4GL

Your individual installation package depends upon the type of QAD SE source code license you have. Each installation package contains the following:

- Install Guide (this document) and Release Notes, located at the top level of the installation directory on the product CD
- Generic module installer
- Client-side artifacts:
  - Workbench .NET UI plug-in and Performance Fix plug-in
  - User guide and online help content for Assist Panel
- Server-side artifacts for Kanban and QRA. Each of them includes:
  - 4GL Code
  - MFG/UTIL support files
  - System data
  - Libraries, (only for QRA)

## 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 configuration information:

**Overview 6**

Provides an overview of the installation process.

**Install Server-Side Artifacts 6**

Provides step-by step instructions to install server-side components, including QRA-related server-side artifacts and Kanban Workbenches (KB WB) related server-side artifacts. Tasks include loading system data and compiling 4GL code.

**Install Client-Side Artifacts 10**

Provides step-by step instructions to install client-side components, including KB WB plug-in for .NET UI, and QAD Assist as well as QAD Assist content.

**Updating Test Databases 12**

Describes how to periodically refresh test databases from the production database.

## Overview

This section provides instructions to install the Kanban Sizing Workbenches, version 1.1.0 for QAD Standard Edition 2008, 2008.1, and 2009.

After you unzip the contents of the package, you are ready to follow normal package installation instructions. Specifically, you:

- Install the server-side artifacts
- Install the client-side artifacts

**Important** Please be aware that even if you meet the prerequisites listed in Chapter 1, the installation package does contain 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.

## Install Server-Side Artifacts

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

- Load data from the installation image to a suitable location.
- If required, install QAD Reference Architecture (QRA). The Kanban Sizing Workbenches use QRA for remote calls. You can skip this step if your system already has QRA installed.
- Install Kanban WB to server.

The following topics discuss each major step.

### Load Data from the Installation Image

- 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 Kanban WB installation media.
- 3 Change to the installation's install directory by typing `cd InstallDir/install`.
- 4 Choose one of the following:
  - For UNIX, launch the installation script in that directory by typing `./install.ksh`.
  - For Windows, run `install.exe`.
    - From the Start menu, select Run, then enter the `install.exe` file.

The welcome screen displays, showing you the product you are installing and the platform.

- 5 Press Enter to start the install.

The license agreement displays. Press CTRL-C to skip reading the agreement, or page down through the agreement. The system prompts you to accept the agreement.
- 6 Enter Y to accept the license agreement.

- 7 Select the location for the update installation log.
- 8 Accept or update the following information when prompted:
  - Progress installation directory
  - Destination directory to install the Kanban WB (*KanbanWBInstallDir*). This can be either inside or outside of the original QAD SE installation directory (*QADInstallDir*).
  - The version of QAD SE that you are using. It must be one of the following:
    - 2008
    - 2008.1
    - 2009
- 9 Review the summary screen and enter Y to copy the update files or enter N to re-enter installation information.
 

The copy progress displays in the command window and is recorded in the file *kanbanWB.log* in your log directory.

## Install QRA

The Kanban Sizing Workbenches use QAD Reference Architecture (QRA) for remote calls.

**Important** You can skip this step if your system already has QRA installed.

MFG/UTIL is used in the following steps.

**Note** If you use the Enhanced Controls module, refer to the QAD SE Update Installation Instructions document for information on unprocessed Enhanced Control records prior to installing the workbenches. This is because MFG/UTIL requires that certain Enhanced Controls records in the database be processed. The link below displays the QAD SE Update Installation Instructions document for 2008SE.

[http://www.qad.com/Documents/qad\\_se/2008/updates/EnterpriseApplications\\_IG\\_v2008SE.pdf](http://www.qad.com/Documents/qad_se/2008/updates/EnterpriseApplications_IG_v2008SE.pdf)

- 1 Copy these files in *KanbanWBInstallDir/KanbanWB/qra* to *QADInstallDir*:
  - *utcompilqra.wrk*
  - *wkqra.ini*
- 2 Choose one of the QRA libraries (QRALib) in *KanbanWBInstallDir/kanbanWB/QRA/qrapl*:
  - *qra.pl* for a 32-bit operating system
  - *qra64.pl* for a 64-bit operating system computer

Copy the appropriate file to *QADInstallDir/qra*; create *QADInstallDir/qra* if it does not exist.
- 3 To configure the QRA library, find the AppServers section in *ubroker.properties*.
  - Add *QADInstallDir/qra/QRALib* to **PROPATH**.
  - Add the following line to the end of the Appservers section:  
*svrStartupProc=mfaistrt.p*

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- Ensure that the AppServers are set to operate in either stateless or state-free mode. One of the following lines should appear in the section:

```
operatingMode=Stateless -- or -- operatingMode=State-free
```

### 4 Launch MFG/UTIL.

### 5 Select QAD ERP Guided Setup from the Configure menu.

### 6 Select Install Patches for QRA in the Operation Set drop-down list.

This workflow executes the following steps. For each step it may be necessary to enter data, such as a database, directory, or file name. These are indicated for each step where required.

#### a Load database data:

- In the Domain text box, enter a domain identifier that is in your production database.
- In the Data Directory textbox, enter *KanbanWBInstallDir/kanbanWB/qra/data*
- In the database list, select your Mfg Production and Adm Production databases by using the up-and-down arrows through the entries and pressing the space bar.
- Press the Ok button.
- The process prompts you to connect to your Mfg Production and Adm Production databases, then to connect again to the Mfg Production database to finish the data installation. This last prompt may show a blank where the database path would normally be specified. Specify the path to your Mfg Production database.
- Check the loading log in the prompt dialog box. Be sure that no errors occurred.

**Note** When you connect to a database with Multiple Users set to Yes, you must change the logical name to *qadadb* for Mfg Production, then change the logical name to *qadadm* for Adm Production by default.

#### b Compile the QRA 4GL .p program files using the supplied compile list file

*KanbanWBInstallDir/kanbanWB/qra/utcompilqra.wrk.*

- For this step it is necessary to include the directories *KanbanWBInstallDir/kanbanWB/qra/xrc*, *KanbanWBInstallDir/kanbanWB/qra/src* and *QADInstallDir/qra/QRALib* as the first directories in the Compile Propath textbox.

**Note** There are maybe some errors about “File Not Found” in the compile. This is because the compile list is comprehensive, so it could contain files for modules that have not been installed. Be sure that the 4GL code files in *qra.lst* are compiled successfully.

**Note** “Staggered QAD ERP Default” is the recommended value for R-code Destination when compiling code, even if the R-code will be placed in a separate directory other than *QADInstallDir*. With this option, the R-code will be compiled and organized in a directory structure.

**Note** The compiled code will be placed in *QADInstallDir* by default. Depending on your installation requirements, you may want to place the compiled code into a different target directory. If you do so, you need to add the Destination Directory to the AppServer’s *PROPATH* before the standard MFG/PRO compiled code directories.

## Install Kanban Workbenches

MFG/UTIL is used in the following steps.

**Note** If you use the Enhanced Controls module, refer to the QAD SE Update Installation Instructions document for information on unprocessed Enhanced Control records prior to installing the workbenches. This is because MFG/UTIL requires that certain Enhanced Controls records in the database be processed. The link below displays the QAD SE Update Installation Instructions document for 2008SE.

[http://www.qad.com/Documents/qad\\_se/2008/updates/EnterpriseApplications\\_IG\\_v2008SE.pdf](http://www.qad.com/Documents/qad_se/2008/updates/EnterpriseApplications_IG_v2008SE.pdf)

- 1 Copy these files in *KanbanWBInstallDir/kanbanWB/kanban* to *QADInstallDir*:
  - *version.kanbanWB*
  - *wkkanbanWB.ini*
- 2 Launch MFG/UTIL.
- 3 Select QAD ERP Guided Setup from the Configure menu.
- 4 Select Install Kanban Sizing Workbenches in the Operation Set drop-down list.
 

This workflow executes the following steps. For each step it may be necessary to enter data, such as a database, directory, or file name. These are indicated for each step where required.

  - a Load database data:
    - In the Domain textbox, enter a domain identifier that is in your production database.
    - In the Data Directory textbox, enter *KanbanWBInstallDir/kanbanWB/kanban/data*.
    - In the Language Selection list, choose the language code of your system. The following lists the language codes of the languages that are supported at this time:
      - cs (Castilian Spanish)
      - cz (Czech)
      - ko (Korean)
      - ls (Latin Spanish)
      - us (US English)
      - du (Dutch)
      - fr (French)
      - ge (German)
      - it (Italian)
      - jp (Japanese)
      - pl (Polish)
      - po (Portuguese)
      - ch (Simplified Chinese)
      - tw (Traditional Chinese)
    - In the database list, select your Mfg Production and Adm Production databases by using the up-and-down arrows through the entries and pressing the space bar.
    - Press the Ok button.

- The process prompts you to connect to your Mfg Production and Adm Production databases, then to connect again to the Mfg Production database to finish the data installation. This last prompt may show a blank where the database path would normally be specified. Specify the path to your Mfg Production database.
- b** Compile the new Kanban WB 4GL .p program files using the supplied compile list file *KanbanWBInstallDir/kanbanWB/kanban/utcompilkanbanWB.wrk*.
  - For this step it is necessary to include the directories *KanbanWBInstallDir/kanbanWB/kanban/xrc* and *KanbanWBInstallDir/kanbanWB/kanban/src* as the first directories in the Compile Propath textbox.

**Note** If QRA was not installed in the system before, it is necessary to add the *KanbanWBInstallDir/kanbanWB/qra/xrc* to the compile PROPATH.

**Note** “Staggered QAD ERP Default” is the recommended value for R-code Destination when compiling code, even if the R-code will be placed in a separate directory other than *QADInstallDir*. With this option, the R-code will be compiled and organized in a directory structure.

**Note** The compiled code will be placed in *QADInstallDir* by default. Depending on your installation requirements, you may want to place the compiled code into a different target directory. If you do so, you need to add the Destination Directory to the AppServer’s PROPATH *before* the standard MFG/PRO compiled code directories

## Install Client-Side Artifacts

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

- Install Plug-Ins
- Install QAD Assist
- Load QAD Assist Content

### Install Plug-Ins

Use the following procedure to install the plug-ins.

- 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 *KanbanWBInstallDir/client/plugins/qad.plugin.kanban-x.x.x.x.zip*  
Where *x.x.x.x* represents the installation package build number.
- 4** Only if you are using .NET UI version 2.9.1, use the following steps to add an additional update to the UI. This will ensure that AppServer agents are properly released back to the “free pool” in the event that certain Kanban WB calculations are invoked.

**Important** This update is already incorporated into .NET UI 2.9.4; skip these steps if you have that version.

- a** Unzip the plug-in zip file contained in the installation directory by typing:

```
unzip KanbanWBInstallDir/client/plugin/base.code-2.9.1.36.6245.zip
```

- b** Edit the plug-in manifest file by typing:

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

- c** Add the following line to the list of <package> elements:

```
<package path="" ref="{Repos}/plugins/base.code/patch/UIG-6245/manifest.qpkg" />
```

## Install QAD Assist

QAD Assist is a QAD .NET UI application that hosts user guide and related content for the QAD .NET UI and for QAD Enterprise Applications. QAD Assist features a search engine that you can use to search across user guides, field help, program help, and process maps.

For QAD .NET UI for QAD Standard Edition, installing QAD Assist is optional. For QAD Enterprise Edition, QDT installs QAD Assist automatically.

If you do not have QAD Assist installed in your QAD SE, refer to the .NET UI Release Notes for your SE version. Instructions to install QAD Assist are included in the .NET User Interface, version 2.8.1, release notes found on this page:

<http://www.qad.com/documentlibrary/QAD+.NET+UI/2+9+2/Release+Notes+2.9.2/QAD+NET+UI+2+8+1+Release+Notes>

**Important** When you install QAD Assist on a version of QAD SE prior to QAD 2009 SE, you do not need to complete the QAD Assist installation steps 5 and 6 that load QAD Enterprise Applications content. This is because QAD Assist was introduced with QAD 2009 SE and content does not exist for QAD SE versions prior to QAD 2009 SE. However, QAD Assist can still be installed and the workbenches user documentation can be loaded into it.

## Load QAD Assist Content

The following procedure assumes that QAD Assist has already been installed.

- 1 Copy `kb-wb-042911.zip` from the `InstallationDirectory/client/documentation` directory to the `TomcatInstallDir/webapps/epub` directory on the QAD .NET UI home server.
- 2 Unzip the content using the `unzip` command:
 

```
unzip kb-wb-042911.zip
```

 Unzipping creates a `kb-wb/en` directory under the `TomcatInstallDir/webapps/epub` directory. The `kb-wb/en` directory contains the content and index file for the Kanban WB content for QAD Assist.
- 3 Add the index to the search engine.
  - Copy the `links-kb-wb-en.xml` file in `TomcatInstallDir/webapps/epub/kb-wb/en` to `TomcatInstallDir/webapps/search/WEB-INF/indexes/default`.

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- The search engine automatically imports the index in:

```
TomcatInstallDir/webapps/search/WEB-INF/indexes/default/links-kb-  
wb-en.xml
```

and removes `links-kb-wb-en.xml` upon completion.

**Note** It may be necessary to restart the search webapp to get the Assistance Panel content to appear. Use the Tomcat Web Application Manager to do this.

### Accessing Help

Once the Kanban WB content is installed on QAD Assist, you can search for help by selecting Help, then Search and entering a topic.

You can also use the `qadsh://URL` mechanism. On machines where the QAD .NET UI client is installed, you can use `qadsh://` to direct QAD Assist to open specific pages or perform a specific search on a particular topic for you. You can then save the `qadsh://` links as Favorites in the QAD .NET UI.

For example, if you create the following `qadsh://` search then save it as a favorite, when you click on it, the system opens the table of contents of the *Kanban Sizing Workbenches User Guide* on any machine running the QAD .NET UI:

```
qadsh://help/ug/kb-wb/en/html/kb-wb-ug/index.html
```

Or, if you create the following `qadsh://` search, QAD Assist automatically searches for the “Using Kanban Sizing Workbenches” topic and displays the results in the Help window.

```
qadsh://help/search?q="Using Kanban Sizing Workbenches"
```

## Updating Test Databases

Periodically you may need to refresh your test databases from the databases in your production environment. To do this, use this subset of steps from the original installation:

- 1 Reload system data for QRA. See step 6 under Install QRA.
- 2 Reload system data for Kanban WB. See step 4 under Install Kanban Workbenches.