QAD Adaptive Applications

Technical Reference

Promotions and Environment Manager

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Promotions and Environment Manager Technical Reference Change Summary

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

Date/Version	Description	Reference	Changed By
MAY 2020/v2020	Initial upload	--	NQC
AUG 2020/v2020.1	Version update; added information about full copies.	6	RQT
MAR 2021/v2021	Updated versioning	--	NQC
SEPT 2021/v2021.1	Updated versioning; Added details about exporting navigation menu	p. 12	FFV
MAR 2022/v2022	Updated versioning	--	FFV
SEPT 2022/v2022.1	Updated versioning	--	FFV
MAR 2023/v2023	Updated versioning	--	FFV
MAR 2024/v2024	Updated versioning	--	FFV
SEPT 2024/v2024.1	Updated versioning	--	FFV
MAR 2025/v2025	Updated versioning	--	FFV

Chapter 1

Introduction

Overview

The EQMS Environment Manager application is designed to enable consistent and managed promotion of customer extensions from a development (DEVL) environment to a test (TEST) environment, and from DEVL to production (PROD).

About This Guide

This user guide focuses on:

- Prerequisites for using Environment Manager
- Capabilities and limitations of Environment Manager
- Process flow for Environment Manager
- Detailed review of each screen and function of Environment Manager
- Instructions and tips for using Environment Manager

Prerequisites for Environment Manager

To effectively perform extension promotions using Environment Manager, it is essential that the following steps are taken:

1. It is critical that source (example: DEVL or TEST) starts as a full copy of the final destination environment (example: PROD) prior to making any changes in DEVL. A full copy means both databases (meta and runtime). It is very important that the environments are on the same builds. It is also critical that PROD has no changes applied to the environment after the copy is made. This means there are no customizations in the target environment (PROD) that are not also in the source environment (DEVL and TEST).
2. AppXtender is only active in DEVL. It must be permanently deactivated in PROD and TEST.
3. Import all modified processes associated with the change. Do not import part of a configuration change.
4. Back up web folders and databases before importing. The utility publishes the destination environment before making any changes permanent. To revert, restore the databases and web folders.
5. Export as a single file.

Hardware and Software Requirements

Minimum Hardware Requirements
2 x CPU system (each processor 4 cores or more) 2 GHz or faster
8 GB RAM
40 GB available disk space

Capabilities of Environment Manager

The QAD EQMS Environment Manager application allows administrative users to complete the following actions:

- Promote extensions from a DEVL environment to a TEST environment and then from a TEST environment to a PROD environment.
- Environment Manager can be installed locally on the client machine as long as the client machine can access the QAD EQMS Admin Tools site.
- Environment Manager can also be installed on the QAD EQMS web server

Note: If report files need to be promoted to the target environment, then the Environment Manager must be run on the Web server for that activity.

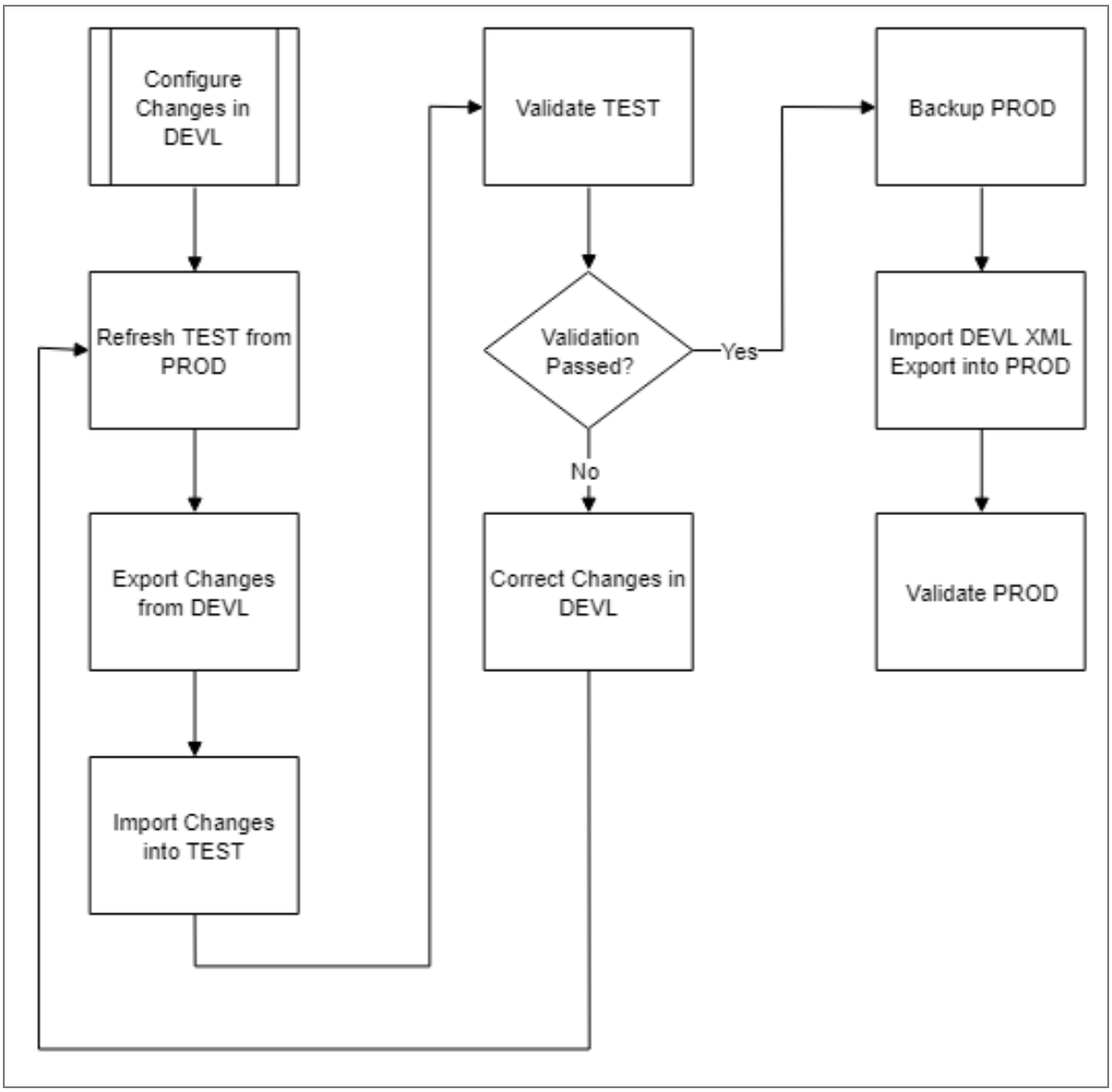
Limitations of Environment Manager

Please note the limitations of Environment Manager, listed below:

- Environment Manager is not designed to work between disparate systems. In this case, "disparate systems" means:
    - Environments that are not part of the same controlled set of DEVL, TEST, and PROD environments for a particular customer.
- Database Objects: Currently, reports that use database objects must be moved over manually. Transaction-based Stored Procedures are not supported in Extended Processes.
- Environment Manager does delete objects, such as custom fields, rules, or triggers.
    - When an object is deleted, all data in that field will be lost with no option for recovery/undo.
    - Data migration must be planned.
- Only extended process configuration is copied over. QAD does **not** copy over any Runtime data added on the HTML Client side. For example, if a new Document Type record is added, it will not be migrated over to the destination system.
    - However, QAD **does** copy over items contained in the meta database, which includes Roles and Business Units.

Process Flow

The chart below illustrates the flow in which process changes are made to product validation:



Configure Changes in DEVL

There are two types of changes to make: configuration changes and customizations.

Examples of changes include the following:

- Extending existing EQMS objects (e.g. Fields and updating the documentation information).
- New customization. Adding new objects (e.g. Filters, Fields, Rules, Actions).

Refresh TEST from PROD

Refresh TEST from PROD to prepare the test environment for importing process changes.

Export Changes from DEVL

Environment Manager is used to prepare an export file (in XML format) of the processes changed and their associated stored procedures.

Import Changes into TEST

Environment Manager is used to import the XML formatted file of the processes changed and their associated stored procedures into the TEST environment.

Verify TEST

During the validation phase, a determination is made as to whether or not the validation passes. This is a manual process, and it is the responsibility of the customer to complete testing on the TEST environment to ensure the TEST environment processes work in an identical manner to DEVL.

Correct Changes in DEVL

If verification fails, it must be determined where the problem lies. If it is a design issue, then it must be rectified and retested in DEVL. If it is a data issue, then the correct approach for remediation must be made in PROD, followed by refreshing the data in DEVL and retaking steps up to the "Validate Test" stage.

Verify TEST

If verification passes in TEST, then the promotion can proceed to the next step.

Backup PROD

Before proceeding with applying the changes to production, the web folders and databases must be backed up and kept in a safe location.

Import DEVL Export into PROD

Use Environment Manager to import the XML formatted file of the changed processes and their associated stored procedures into the PROD environment.

Verify PROD

The verification process within PROD occurs at this stage.

Going over best practices for process changes and associated use for Environment Manager.

Chapter 2

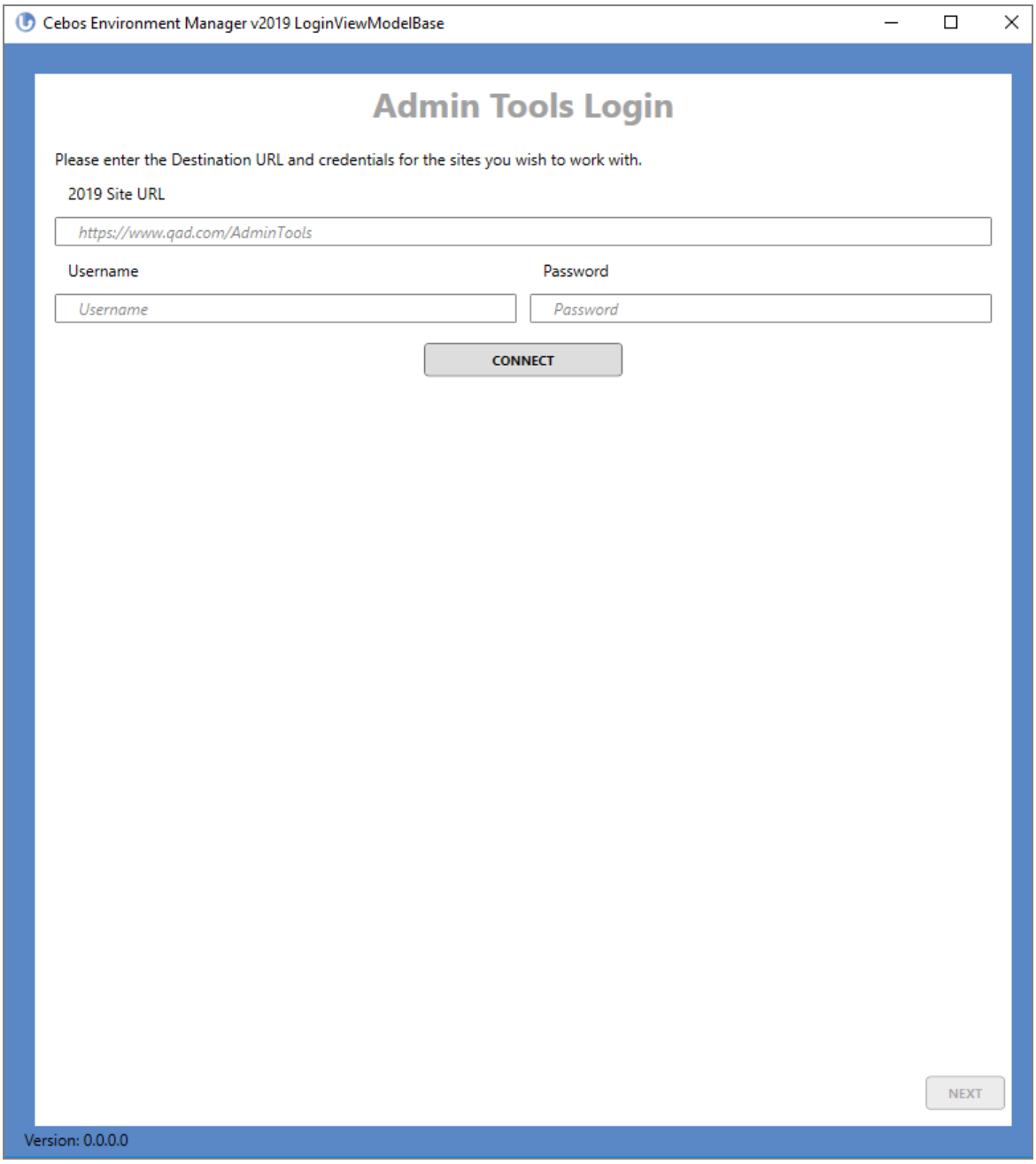
Using the Environment Manager

Sign In

On the opening page, enter the Admin Tools URL for the development environment, as well as the admin user credentials. Ensure that the URL belongs to Admin Tools, **not** the application site.

To export a file, enter a path to the source system (development) site. To import a file, enter a path to a test or production environment. A user must enter admin credentials.

Fig. 1: Admin Tools Login page



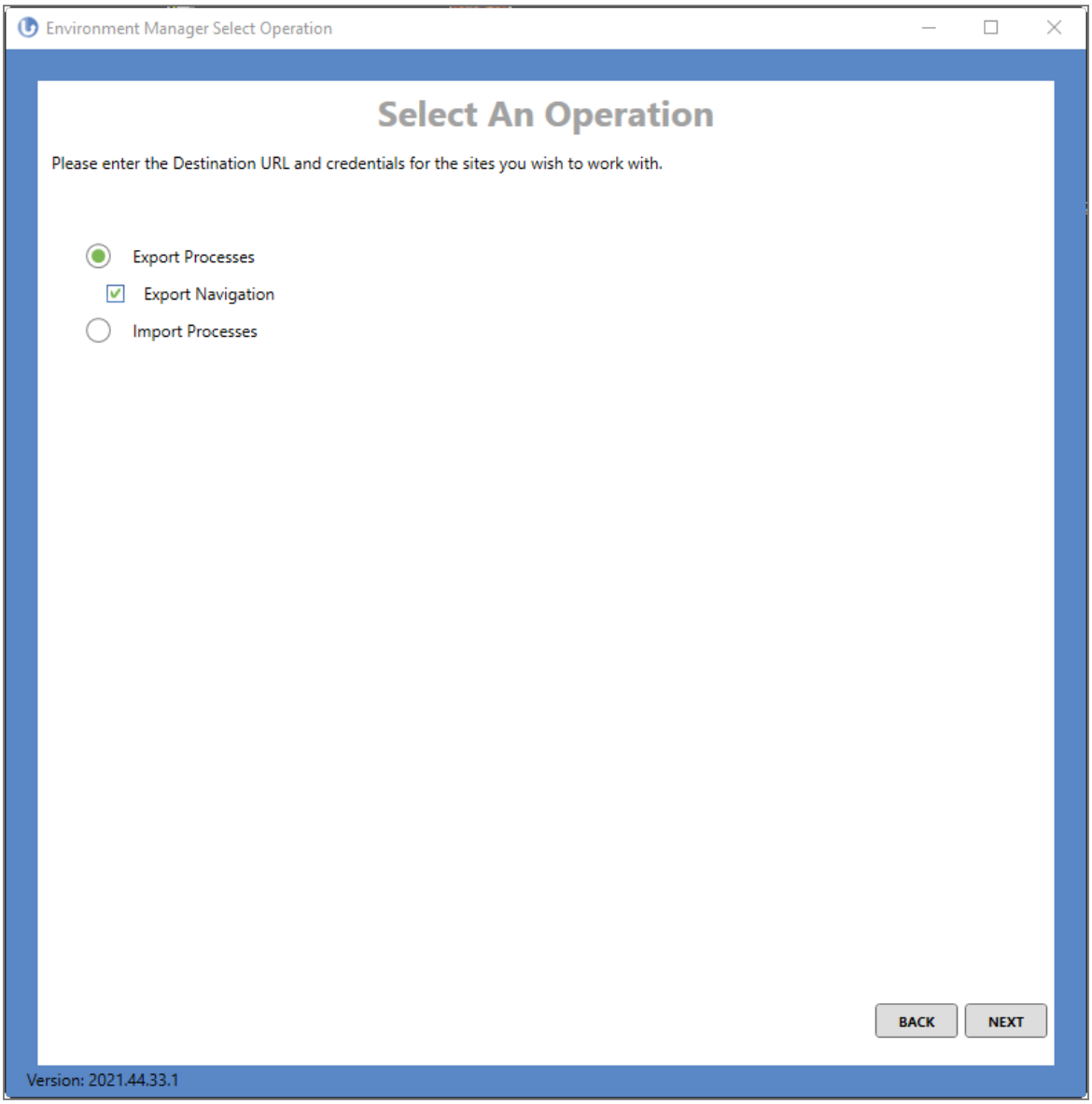
After entering the applicable path and admin credentials, click the Connect button. When you have successfully signed in, click the Next button. Note that this button is greyed out until the connection is successful.

Main Page and Options

In the Main Page, select one of two options:

1. **Export Processes.** This option exports a process or processes into a single XML formatted file.
    a. **Export Navigation.** Select this option if you wish to include the navigation menu in the export. During import, the navigation menu will automatically be updated.
2. **Import Processes.** This option imports a process or processes incorporated into a single XML formatted file.

Fig. 2: Select an Operation screen

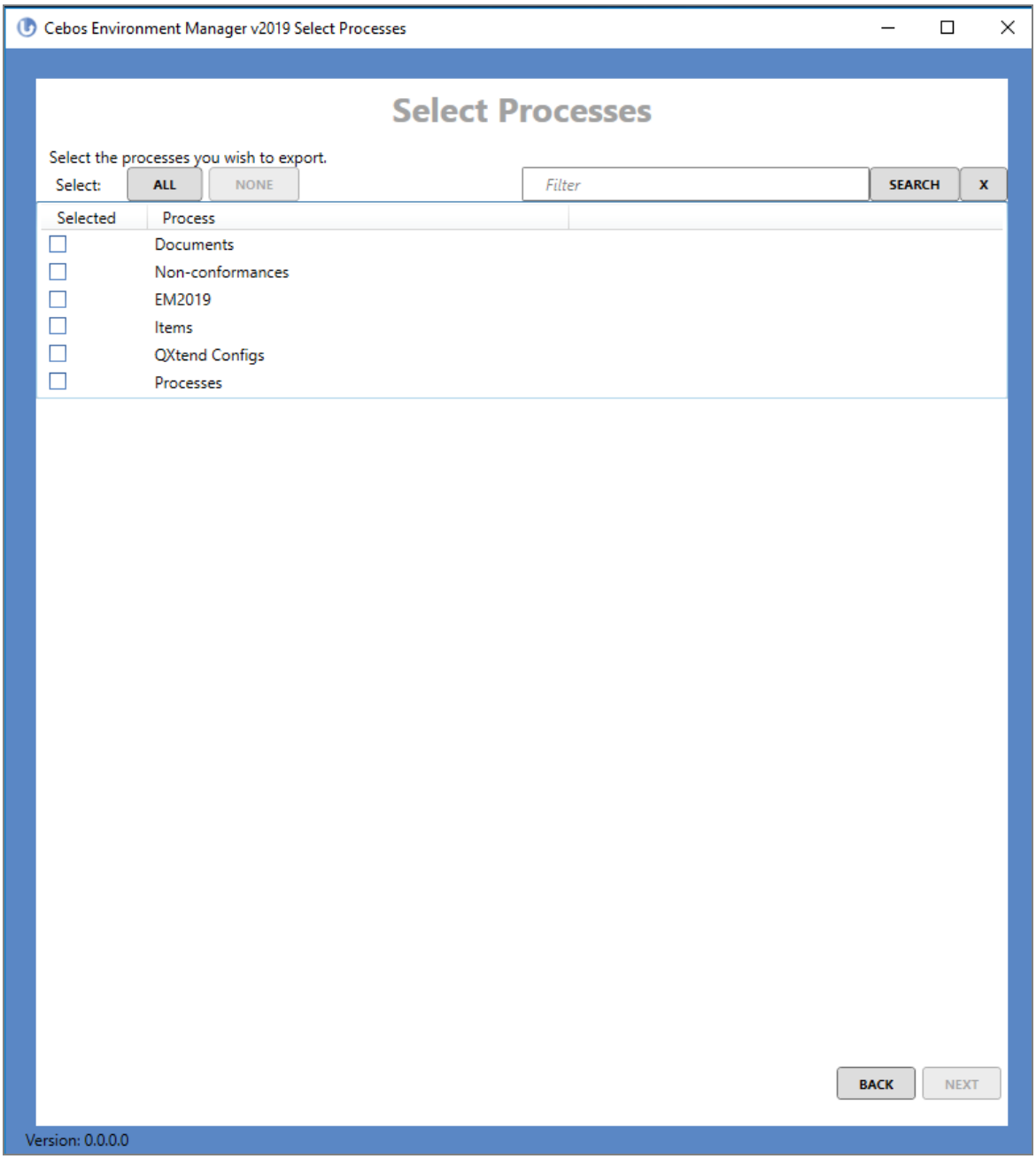


Download Processes

The Select Processes page lists all extended processes found in the system. If you are exporting, then select the processes to download. Only select processes you know include all the changes you have made; if you are unsure, then you may select all of them.

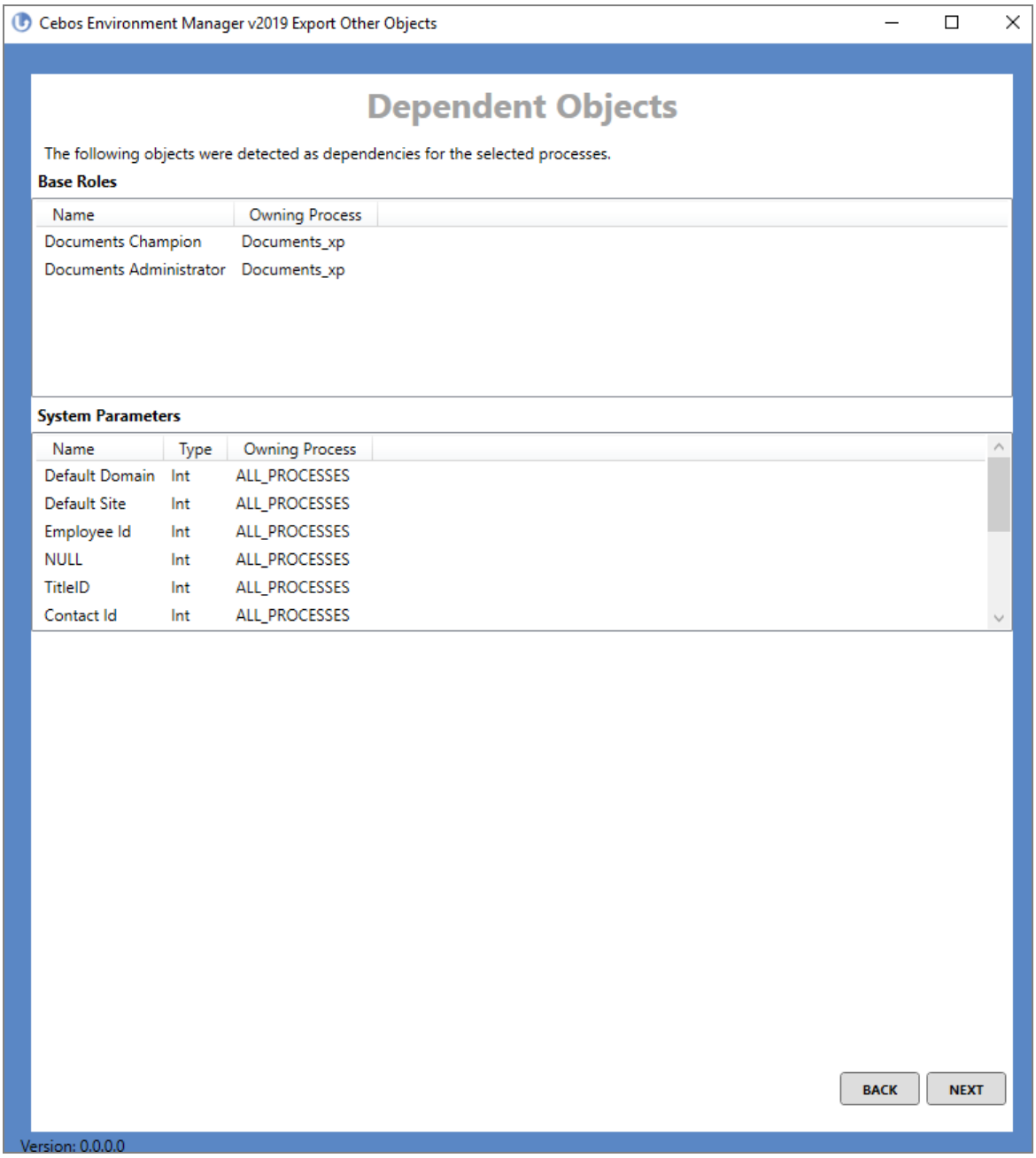
If you import extended processes that are dependent on another process and you did not select it, then the processes will fail to import until the dependent object is present. Click the Next button to proceed.

Fig. 3: Select Processes screen



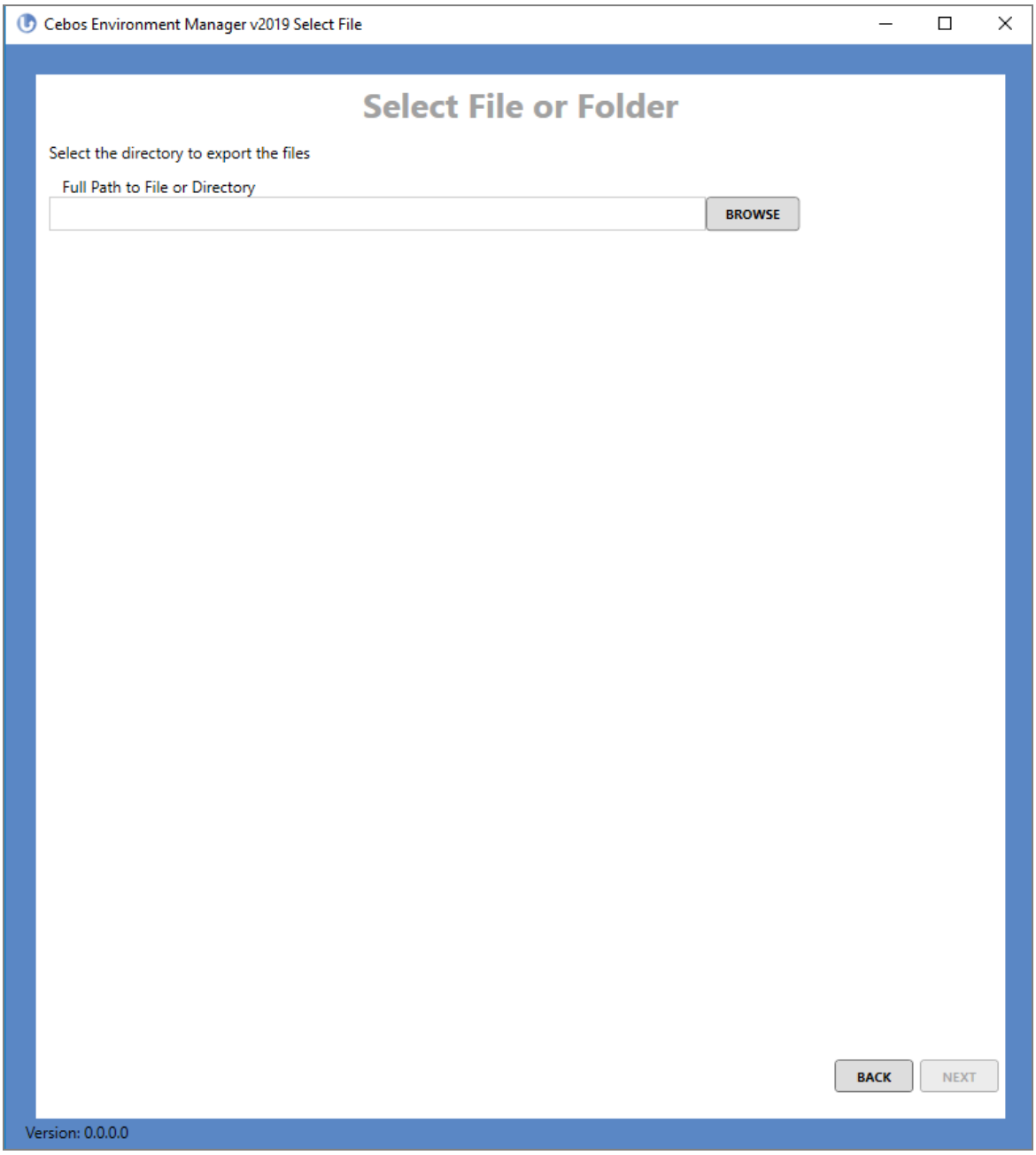
The Dependent Objects page lists objects (e.g. roles, system parameters, business units) detected as dependencies for select processes. These objects are found in the system and will be included in the export.

Fig. 4: Dependent Objects screen



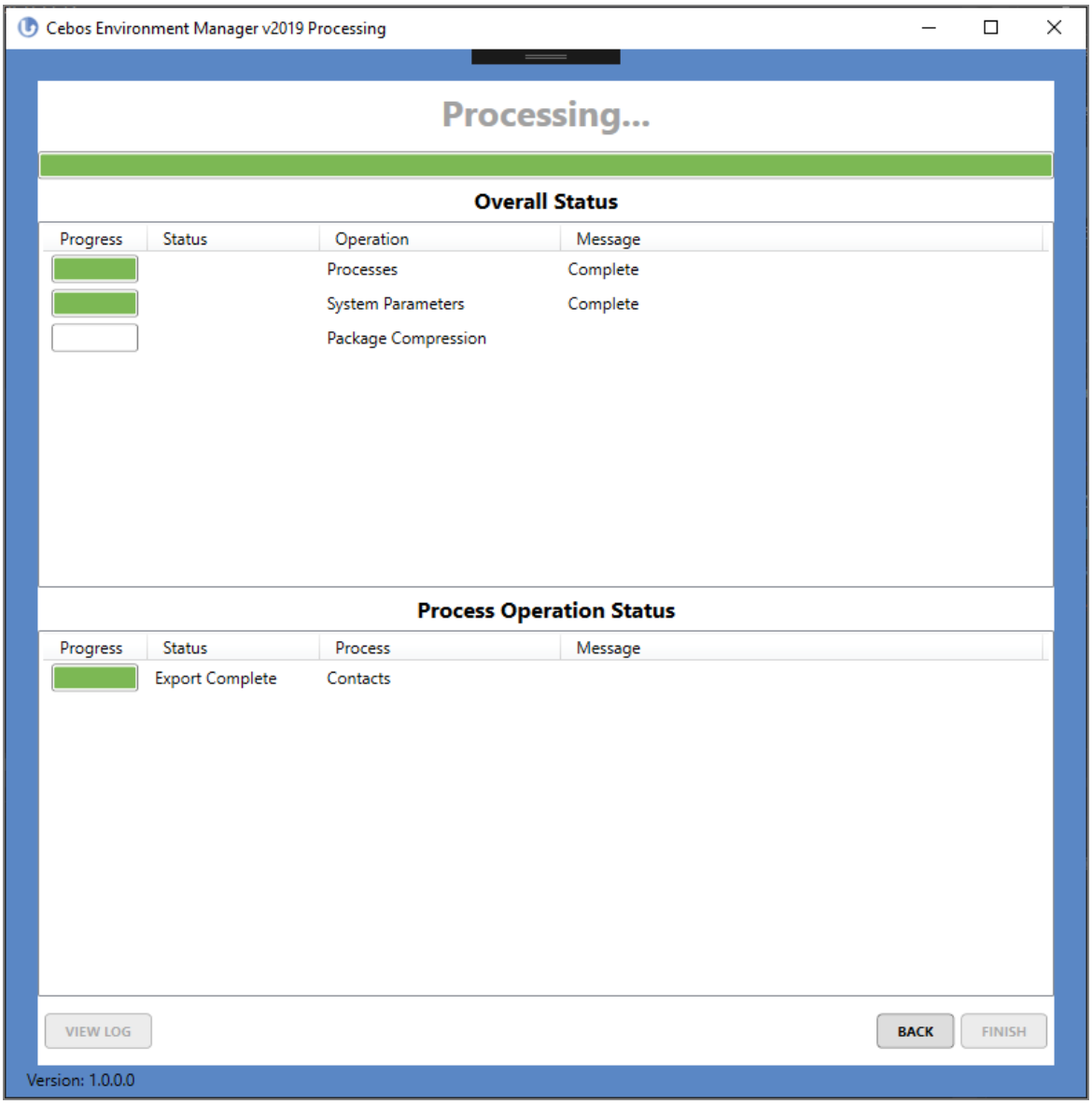
Select a location to save the .zip file. Then click Next.

Fig. 5: Select File or Folder screen



This page shows the overall status of exporting the extended processes and dependent objects.

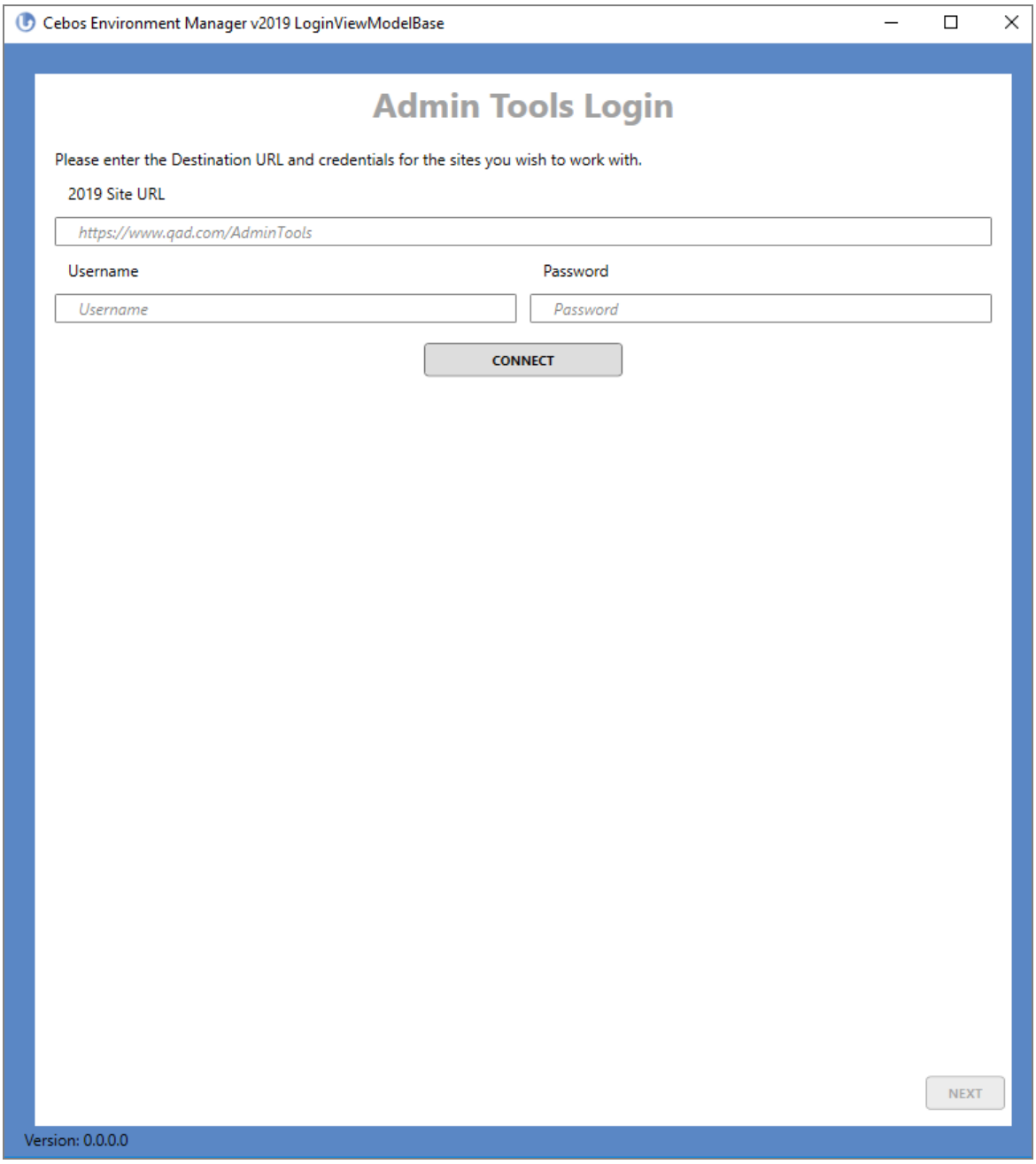
Fig. 6: Overall Status screen



Upload Processes

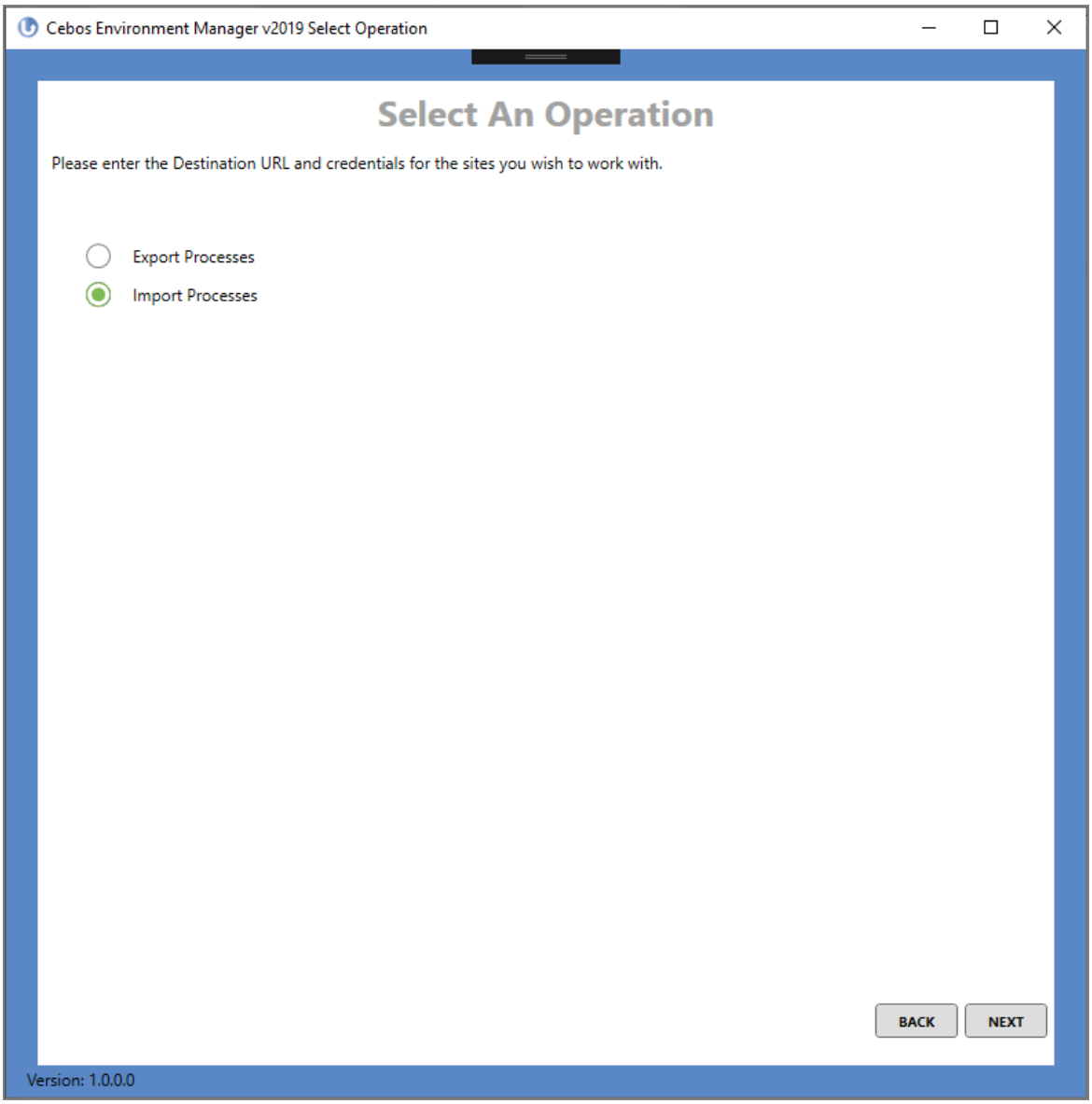
The procedure for uploading, or importing, processes (in this case, to the test environment) is very similar to downloading processes. To import a file, enter the path to the test environment. As with downloading processes, a user must enter admin credentials to sign in.

Fig. 7: Admin Tools Login screen



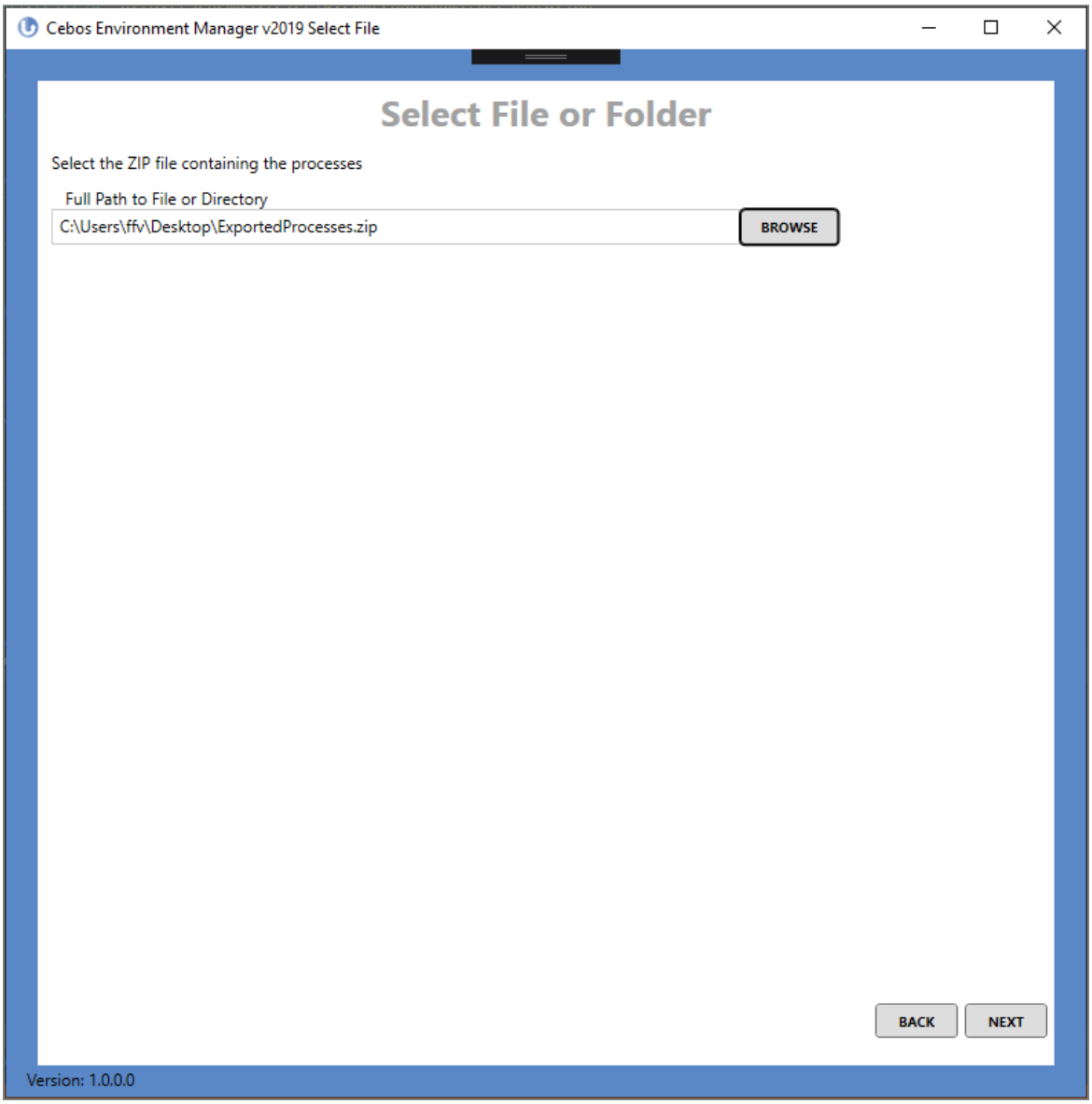
Select Import Processes, then click Next.

Fig. 8: Select An Operation screen



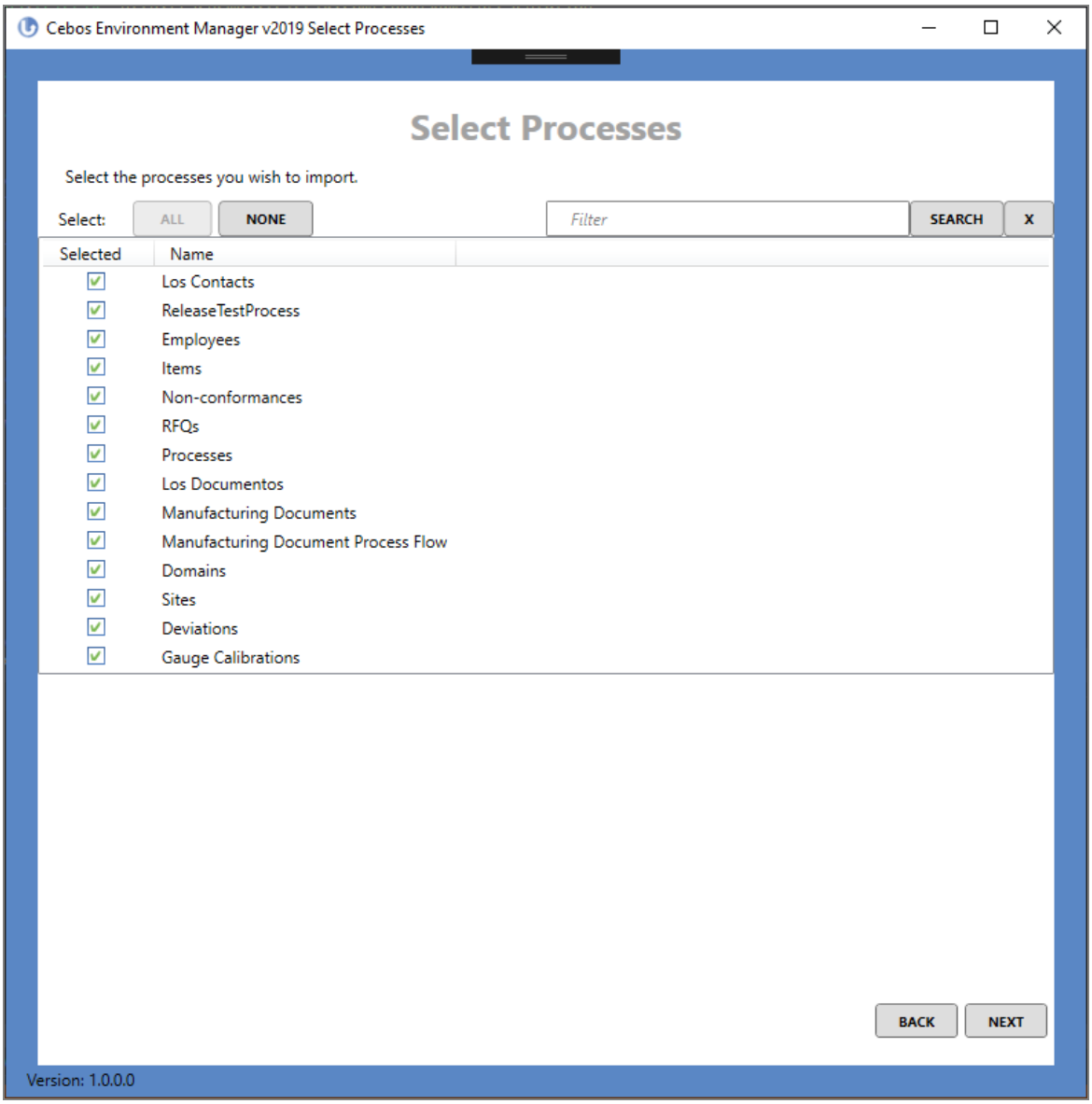
Select the exported .zip file, then click Next.

Fig. 9: Select File or Folder screen



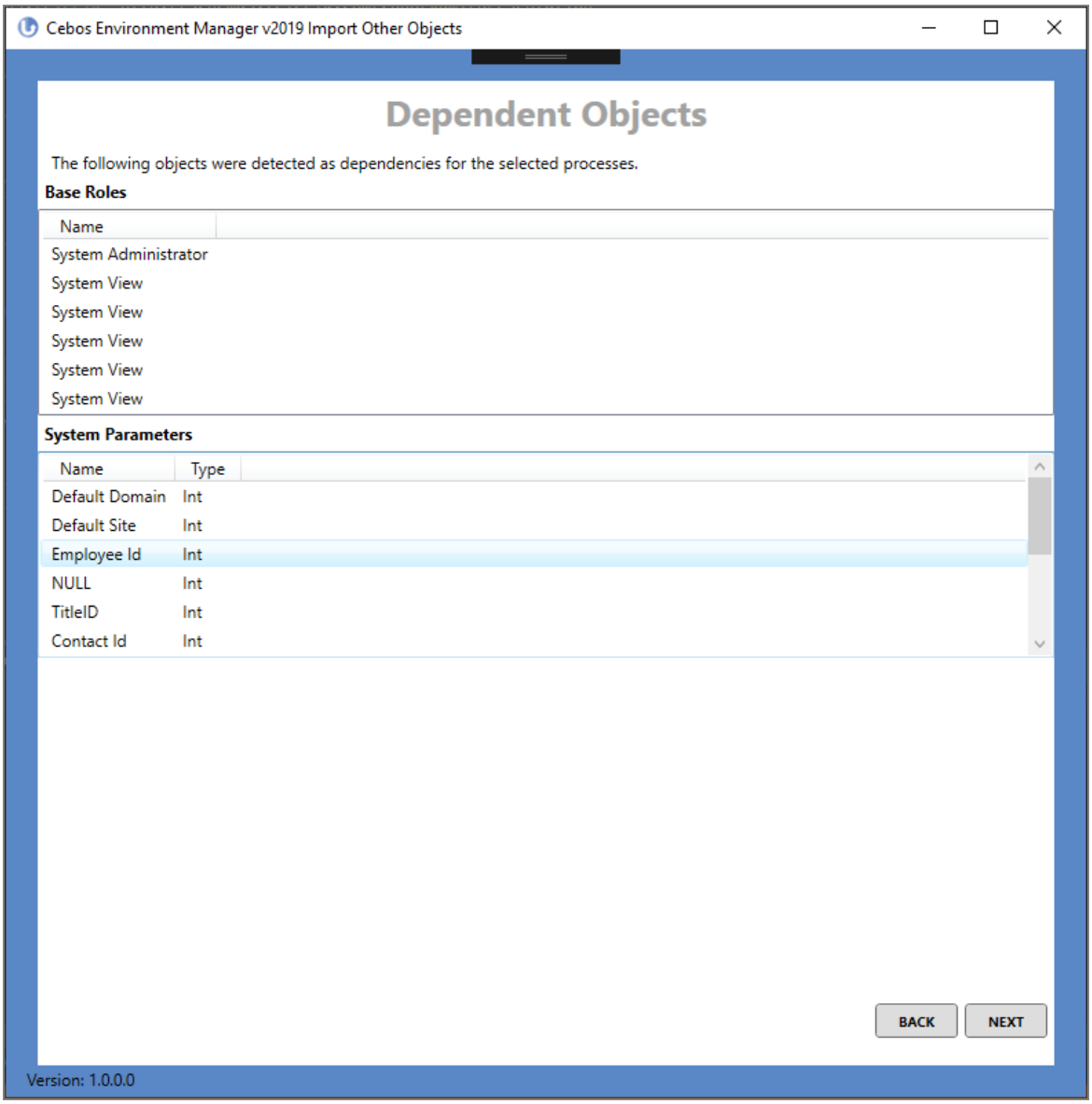
Select the extended processes you wish to import.

Fig. 10: Select Processes screen



The Dependent Objects page displays all the dependent objects contained in the exported file. Review this page, then click Next when ready. The process starts automatically.

Fig. 11: Dependent Objects screen



You can click View Log when the process is finished.

The process will publish and deploy automatically. If it fails on this step for any reason, then retry within the Admin Tools site directly.

Fig. 12: Overall Status screen