Installation Guide
QAD Configurator

78-0732B
QAD Configurator Version 4.4.1
QAD Enterprise Applications 2007, 2007.1, and 2008 - Standard Edition
July 2008

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About This Guide

About QAD Configurator

QAD Configurator is a module designed to work with QAD's enterprise resource planning (ERP) application. QAD Configurator provides powerful but flexible product configuration features that enable sales personnel to configure customer-specific products without having to know the technical details of the products.

Using QAD Configurator, engineering personnel first define product features to determine how the product can be configured and set rules and formulas to define components and routings for the product to be configured depending on selected features. Sales personnel then run QAD Configurator's questionnaire to configure products when creating sales quotes or sales orders within the ERP system environment.

QAD Configurator also provides a range of control, inquiry, and reporting functions that let you run the system efficiently on a day-to-day basis.

Currently QAD Configurator only runs in GUI under Windows and is not supported in Oracle environments.

This guide applies to multiple versions of QAD's ERP application including QAD Enterprise Applications 2007, 2007.1, and 2008 - Standard Edition.

Other QAD Configurator Documentation

This guide provides detailed information on how to install the QAD Configurator system.

For details on how to implement the QAD Configurator system and how to use QAD Configurator in day-to-day operations, see *User Guide: QAD Configurator.*

These instructions are intended for the system administrator who is installing the database and is familiar with the Microsoft Windows operating system, Progress software, and networking.

QAD Web Site

QAD's 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 users with a QAD Web account, product documentation is available for viewing or downloading from the QAD Online Support Center at:

http://support.qad.com/

You can register for a QAD Web account at the QAD Online Support Center. 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.
- 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 users 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 Configurator.

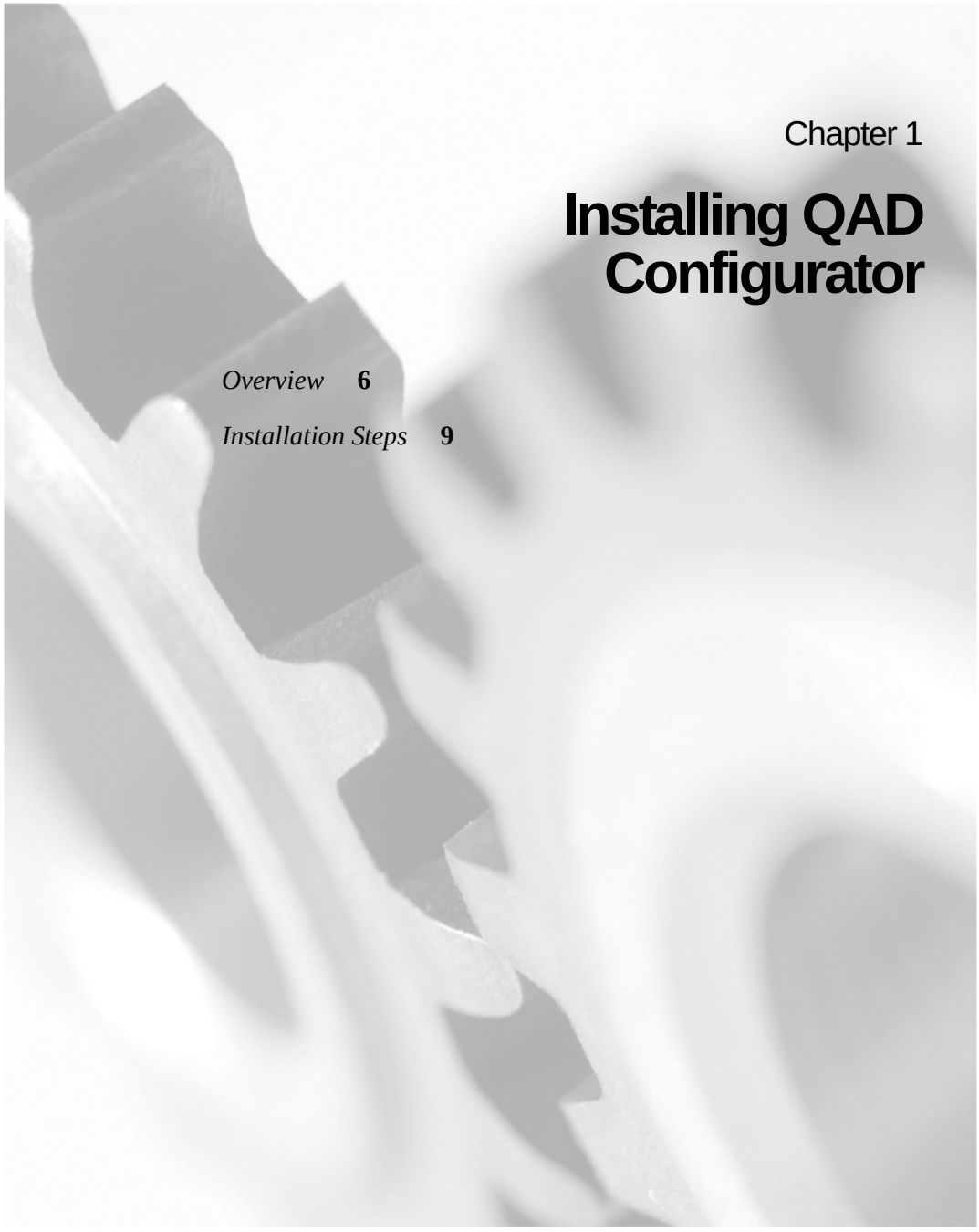
Important Before you start the installation, check the Web site to make sure you have the most recent version of this document.

Conventions

This document supports the installation of QAD Configurator on both Windows and UNIX platforms. The instructions use Windows GUI screens and Windows file and path conventions. In the few places where the two sets of instructions diverge, the headings and text state explicitly which operating system is the focus of the current set of instructions.

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.
`italicized monospaced text`	A variable name for a value you enter as part of an operating system command; for example, *`YourCDROMDir`*.
`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.



Chapter 1

Installing QAD Configurator

Overview

This chapter provides instructions for installing the QAD Configurator product in your ERP system environments.

Note It is assumed that you have already installed the QAD ERP application. See installation guide for information on installing that system.

The QAD Configurator installation requires the following general steps:

- Create QAD Configurator Databases
- Install QAD Configurator Windows GUI client

The following steps are required only if you want to implement the Questionnaire .NET user interface.

- Install QAD Configurator AppServer API
- Install QAD Configurator WebSpeed Files
- Install QAD Configurator .NET UI Plug-In
- Set QAD Desktop Connection Timeout (Optional)

Supported Versions

QAD Configurator 4.4.1 can be installed with the following ERP application versions on a Progress database; Oracle is not currently supported:

- QAD 2007 and QAD 2007.1
- QAD 2008 - Standard Edition

Prerequisite Software Components

The following components should be installed before you install QAD Configurator. See related documentation for information on how to install these components.

- OpenEdge 10.1A01 and up with the following components:
  - OE Application Server Basic or OE Application Server Enterprise
  - OE Enterprise RDBMS

    - 4GL Development System
- QAD 2007, QAD 2007.1, or QAD 2008 - Standard with the following components:
    - Database server
    - GUI file server
    - GUI client

The following components are required to implement the Questionnaire .NET user interface.

- QAD 2008 - Standard using QAD .NET UI 2.7.
- Apache web server 2.0 or above

QAD Configurator Deployment

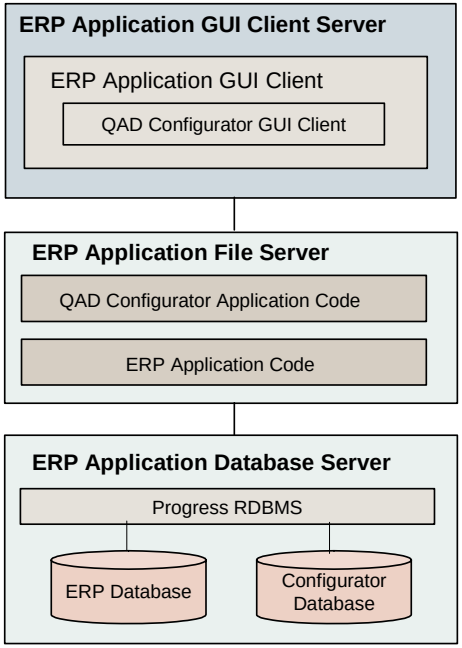
The default deployment of QAD Configurator places QAD Configurator databases on the ERP system database server and application files in the directory where you installed the ERP GUI file server or client files. For example, if the *`QADERPInstallDir`* is `\mfgsvr` on Windows, *`ConfiguratorInstallDir`* would be `\mfgsvr\guicli\cpd`.

You can move QAD Configurator to a different directory structure or on a different drive after installation. If you do so, make sure your PROPATH is updated to run QAD Configurator programs.

To implement the Questionnaire .NET UI, install the Configurator AppServer API and Configurator .NET plug-in on the ERP system .NET UI AppServer and install Configurator WebSpeed files on the Apache web server.

Note QAD Configurator Web applications cannot be deployed on the Tomcat server.

Fig. 1.1
QAD Configurator
GUI Deployment



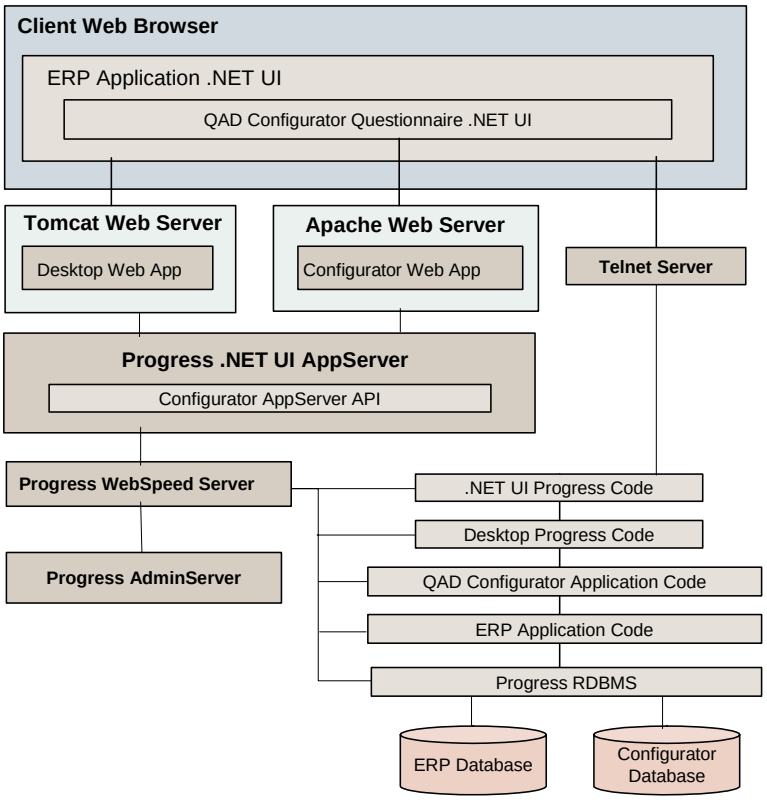


Fig. 1.2
QAD Configurator .NET UI Deployment

Languages

QAD Configurator currently supports the English (US) and German (GE) languages. To create a US English-only install, no special steps are required. To create an install that supports the German language, additional steps are required after the US English language install is completed. See “Implement the German Language” on page 35 for instructions on creating a German language install.

Installation Steps

QAD Configurator ships on a single CD that contains all required programs and all available language files.

Create QAD Configurator Databases

Use the following steps to create QAD Configurator databases on the ERP database server.

Install QAD Configurator Database Files

1. Launch `install.exe` (Windows) or `install.ksh` (Linux) in the `install` directory on the QAD Configurator CD.
2. Enter 1 to choose QAD Configurator Database Server.
3. A welcome screen displays. Press Enter to view license agreement. Press the spacebar to scroll down the page.
4. Use the following table to enter the appropriate values for script execution.

Table 1.1
Install Script Steps

Step	User Values
License agreement	Specify Yes.
Install log file	Accept the default or enter a new location and name.
Progress installation directory	Enter your Progress installation directory.
Install database, system data, and tool set files for QAD Configurator	Enter Yes to install the QAD Configurator database, system data, and tool set files on this machine.
QAD ERP application database server installation directory	Enter the ERP application installation directory where you installed the database server files (*`QADERPInstallDir`*).
Install QAD Configurator AppServer code	Enter No.
Install Configurator WebSpeed code	Enter No.
Install Configurator .NET plug-in	Enter No.
Proceed using these values?	If the values you entered are correct, accept the default. Otherwise, enter No and you will be returned to point where you specified the Progress directory so you can modify previous values.

5 The install script executes. When execution is complete, press Enter to end the script.

Note At the end of the script, the name and location of the installation log file display. You can open the log file in a text editor to check for errors.

Create the QAD Configurator Empty Database

The `cpdempty` database is used to create the production QAD Configurator database.

1 Launch the ERP application database server MFG/UTIL.

2 The MFG/UTIL window displays. Select Configure|MFG/PRO Guided Setup.

3 The Operation Sets screen displays. Select Create Configurator Progress Empty DB from the Operation Set drop-down list; then choose Run Set.

4 The QAD Database Builder screen displays. Choose Create DB.

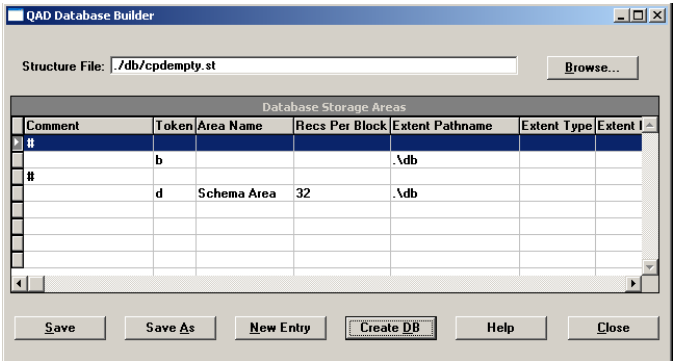
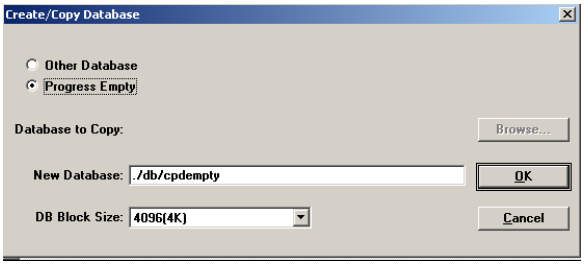


Fig. 1.3
QAD Database Builder

5 The Create/Copy Database dialog box displays. Choose OK.

Fig. 1.4
Create Empty Database



6 The database creation process begins. The QAD Create Database Monitor window displays progress and error status. When database creation is complete, choose Close to exit.

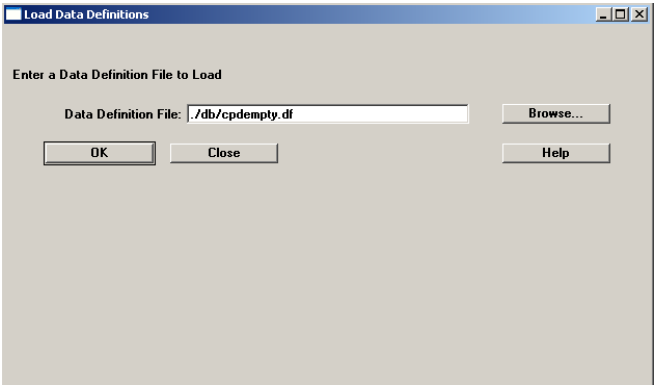
7 You return to the QAD Database Builder screen; choose Close to exit.

8 The Connect Database window displays. Connect to `cpdempty.db` and choose OK.

Fig. 1.5
Connect to the QAD Configurator Empty Database

9 The Load Data Definitions screen displays. The database schema files (`.df`) loaded contain the table, field, and index definitions for your QAD Configurator database. Choose OK.

Fig. 1.6
Load the QAD Configurator Data Definitions



10 A load window displays. When the load is complete, choose Close in the QAD Log window.

11 The Truncate BI File window displays. Choose Truncate.

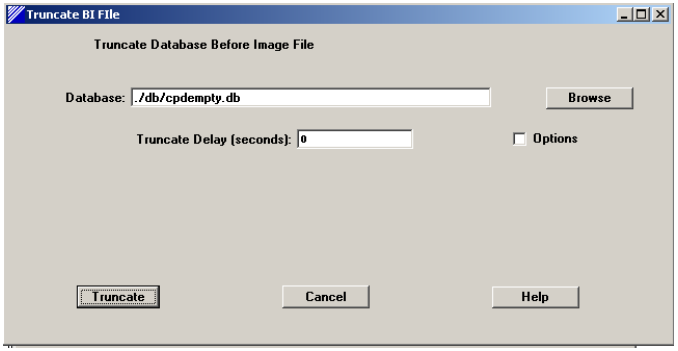


Fig. 1.7
Truncate BI File

12 The truncate process begins showing progress and error status. When file truncate is complete, choose Close to exit.

13 You return to the Operation Sets window. Choose Close to exit.

The QAD Configurator empty database is created.

Build the QAD Configurator Production Database

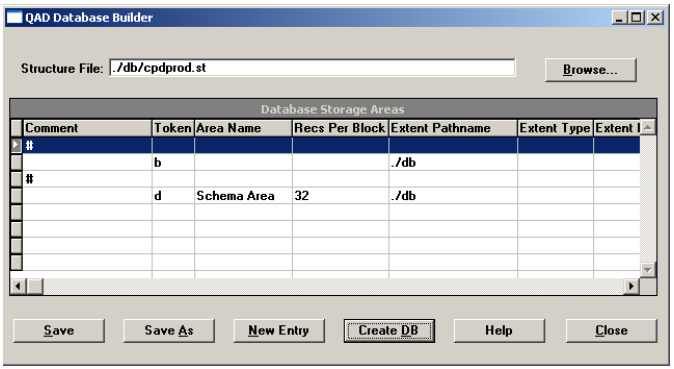
These steps create a production database.

1 Select Configure|MFG/PRO Guided Setup.

2 The Operation Sets screen displays. Select Create Configurator Progress Production DB from the Operation Set drop-down list; then choose Run Set.

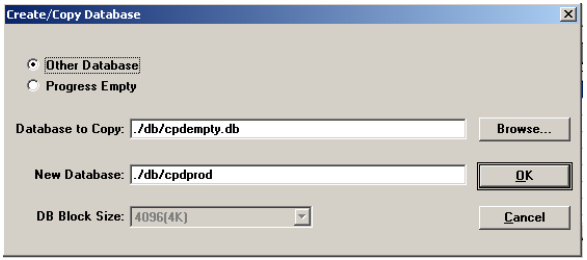
3 The QAD Database Builder screen displays. Choose Create DB.

Fig. 1.8
QAD Database Builder



4 The Create/Copy Database dialog box displays. Choose OK.

Fig. 1.9
Create Production Database



5 The database creation process begins. The QAD Create Database Monitor window displays showing progress and error status. When database creation is complete, choose Close to exit.

6 You return to the QAD Database Builder screen; choose Close to exit.

7 The Connect Database window displays. Connect to `mfgprod.db` in the *`QADERPInstallDir`*`\db` directory and choose OK.

Note Close all other applications connected to `mfgprod.db`.

8 The QAD Log window displays. Choose Close.

9 The Table Selection for Load window displays. With all the tables in the list selected, choose OK.

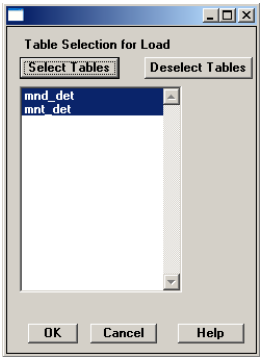


Fig. 1.10
Table Selection for Load

10 The QAD Log window displays the records of the selected tables that are being processed. When the data load is complete, choose Close to exit.

11 The Truncate BI File window displays. Choose Truncate.

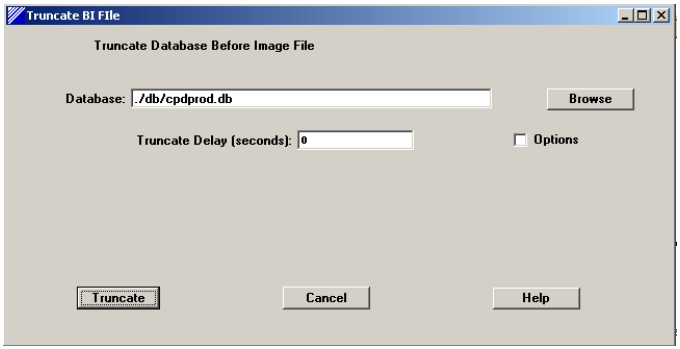


Fig. 1.11
Truncate BI File

12 The truncate process begins. The QAD Database Monitor window displays progress and error status. When file truncate is complete, choose Close to exit.

13 You return to the Operation Sets window. Choose Close to exit.

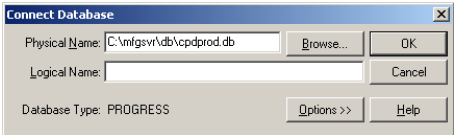
The QAD Configurator production database is created.

Load QAD Configurator Data

Data must be loaded into the QAD Configurator production database through Data Administration in Progress.

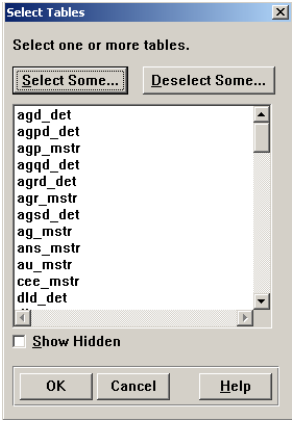
1. Launch Progress Data Administration. On Windows, click the icon on the Start menu; on Unix, execute `$DLC/bin/pro -p _admin.p`.
2. The Data Administration screen displays. Select Database|Connect to connect to the QAD Configurator production database.
3. The Connect Database window displays. Connect to *`QADERPInstallDir`*`\db\cpdprod.db` and choose OK.

Fig. 1.12 Connect to the QAD Configurator Production Database



4. The QAD Configurator production database is connected. Select Admin|Load Data and Definitions|Table Contents (.d File). The Select Tables window displays.

Fig. 1.13 Select Tables for Loading Data into the QAD Configurator Production Database



5 Select all the tables in the list. To select all the tables, choose Select Some; then in the Select Tables by Pattern Match window, enter * as the table name and choose OK.

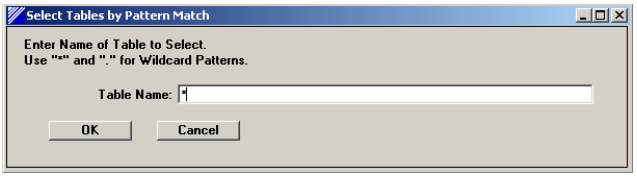


Fig. 1.14 Select Tables by Pattern Match

6 Back in the Select Tables window, choose OK.

7 The Load Data Contents for All Tables window displays. Enter *QADERPInstallDir*\data\cpd as the input directory. Select Output Errors to Screen if you want to view error information during the process. Choose OK.

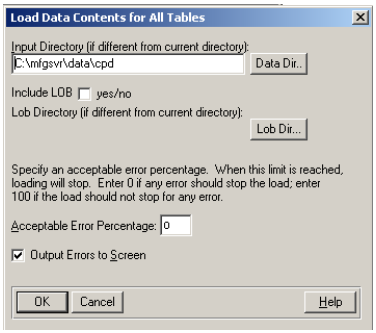


Fig. 1.15 Load Data Contents for All Tables

8 A load window displays. When the load is complete, choose Close in the Information prompt window.

9 Data has been loaded into the QAD Configurator production database.

10 Choose Database|Exit to exit Data Administration.

Create Start/Stop Scripts for Configurator Databases

Create the following database start/stop script files in the Configurator installation directory. Provide the Progress installation directory, QAD ERP application installation directory, and service name in the script files. Use the following template to create scripts for both Configurator production and empty databases.

Note The service name is added to `%System32%\drivers\etc\services` on Windows and `/etc/services` on Unix.

- Start (on Linux)

```
#!/bin/sh
# Script to start database servers.
# tokens:
# &DLC = Progress Directory
# &LOOP-DB-START = start of database loop
# &LOOP-DB-END = end of database loop
# &START-SERVER = command line to start current DB in database
loop
DLC=ProgressInstallDir;export DLC
PATH=$PATH:$DLC;export PATH
PROMSGS=$DLC/promsgs;export PROMSGS
PROTERMCAP=$DLC/protermcap;export PROTERMCAP
$DLC/bin/_mprosrv QADERPInstallDir/db/cpdprod -L 8000 -c 350 -B
1000 -S ServiceName -N TCP
```

- Stop (on Linux)

```
#!/bin/sh
# Script to stop database servers.
# tokens:
# &DLC = Progress Directory
# &LOOP-DB-START = start of database loop
# &LOOP-DB-END = end of database loop
# &STOP-SERVER = command line to shutdown current DB in database
loop
DLC=ProgressInstallDir;export DLC
PATH=$PATH:$DLC;export PATH
PROMSGS=$DLC/promsgs;export PROMSGS
PROTERMCAP=$DLC/protermcap;export PROTERMCAP
$DLC/bin/_mprshut QADERPInstallDir/db/cpdprod -by
```

- Start.bat (on Windows)

```
REM Script to start database server.
REM tokens:
REM &DLC = Progress Directory
REM &LOOP-DB-START = start of database loop
REM &LOOP-DB-END = end of database loop
REM &START-SERVER = command line to start current DB in database
loop
SET DLC=ProgressInstallDir
```

```
SET PATH=%PATH%;%DLC%
SET PROMSGS=%DLC%\promsgs
SET PROTERMCAP=%DLC%\protermcap
REM loop-db-start
%DLC%\bin\_mprosrv QADERPInstallDir\db\cpdprod -L 8000 -c 350 -B
1000 -S ServiceName -N TCP
REM loop-db-end
pause
```

- Stop.bat (on Windows)

```
REM file: stop.wtp
REM Script to stop database servers.
REM tokens:
REM &DLC = Progress Directory
REM &LOOP-DB-START = start of database loop
REM &LOOP-DB-END = end of database loop
REM &STOP-SERVER = command line to shutdown current DB in database
loop
SET DLC=ProgressInstallDir
SET PATH=%PATH%;%DLC%
SET PROMSGS=%DLC%\promsgs
SET PROTERMCAP=%DLC%\protermcap
REM loop-db-start
%DLC%\bin\_mprshut QADERPInstallDir\db\cpdprod -by
REM loop-db-end
pause
```

Install QAD Configurator Windows GUI client

Use the following steps to install QAD Configurator Windows GUI client on the QAD ERP application GUI file server.

Install QAD Configurator Application Files

1. Insert the QAD Configurator CD into a CD-ROM drive and launch `install.exe` in the `install` directory on the CD.

   Important If you copy the installation files to your local drive, make sure they are copied to a directory with no spaces in its full path.

2. Enter 2 to choose QAD Configurator Client.

3. Enter the QAD ERP GUI file server directory. Default is *`QADERPInstallDir\guicli`*.

4. The install script executes. When execution is complete, press Enter to end the script.

Note At the end of the script, the name and location of the installation log file display. You can open the log file in a text editor to check for errors.

5 Open *ConfiguratorInstallDir*\cpdxrc\pcparm.i in a text editor. Specify mfgversion to be the ERP application service pack version in the file: 5 for QAD 2007, 6 for QAD 2007.1, and 7 for QAD 2008 - Standard Edition.

Compile QAD Configurator Application Files

Prior to running QAD Configurator under QAD ERP, you must compile the QAD Configurator code and several modified QAD ERP programs specific to your release and service pack. The appropriate compile list file (utcompil.wrk) is located in the QAD Configurator source code directory.

Note If you have installed or plan to install AIM, you must copy all the files from *ConfiguratorInstallDir*\cpdsrc to *ConfiguratorInstallDir*\cpdxrc prior to compiling QAD Configurator application files.

1 Launch MFG/UTIL for Configurator 4.4.1.

On Windows, from the Start menu, choose All Programs| *ConfiguratorFolderName*|CPD(GUI).

2 In MFG/UTIL, select Configure|Database Set Maintenance.

3 The Database Set Configuration window displays. In the database set list, select CPDCompile.

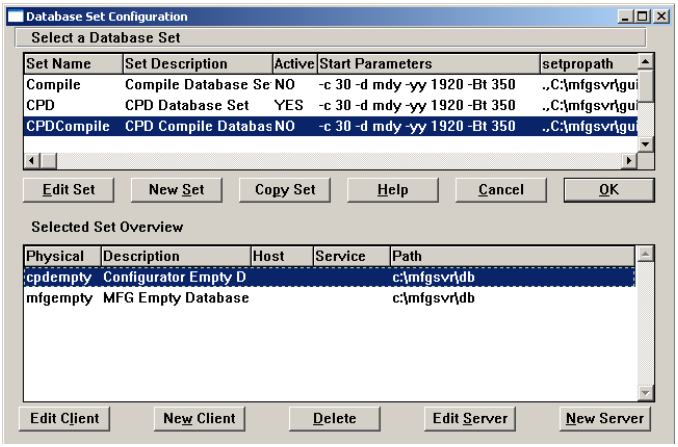


Fig. 1.16
Database Set Configuration

4 Perform the following steps to configure the client view of the cpdempty and mfgempty databases:

Note When the empty databases are deployed remotely, you need to create start/stop scripts. Use the information in “Create Start/Stop Scripts for Configurator Databases” on page 18 as a reference to create the start/stop scripts for empty databases.

a Select a database and choose Edit Client.

b When the Client Database Parameters screen displays, complete the fields using the following figure and field descriptions as guides.

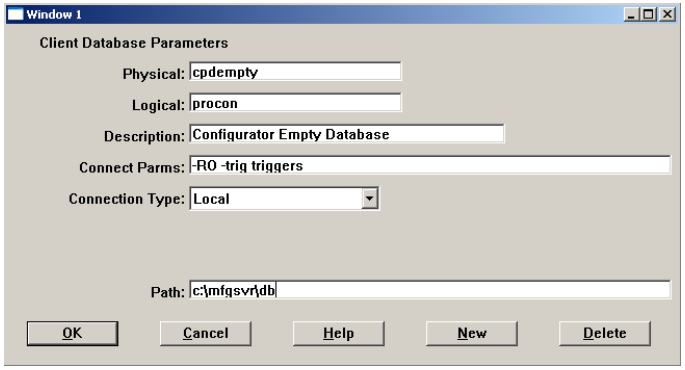


Fig. 1.17
Edit Client Database Parameters

Physical. Physical name of the database; accept the default if there is one.

Path. If you choose a Local connection type, enter or accept the full path to the directory containing the database file (extension `.db`). This should be *`QADERPInstallDir`*`\db`.

Accept the defaults for the rest of the fields.

Connection Type. If the Configurator database is installed on the same machine, choose Local; otherwise, choose ClientServer.

Host. If you choose a client/server connection, enter the host name of the machine where the database is located.

Service. For client/server connections, enter a service name for the database that corresponds to an entry in your `\etc\services` file. You must make the entries in the services file separately; the installation does not change this file. When ready, choose OK to continue.

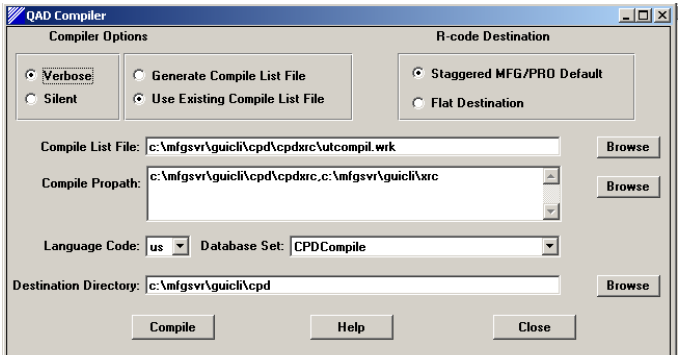
c When ready, choose OK to continue.

5 Once you have configured each database in the set, verify the database set in the Selected Set Overview frame. Click OK in the Database Set Configuration window.

6 In MFG/UTIL, select Programs|Compile Procedure.

7 The QAD Compiler window displays. Accept all the defaults and choose Compile.

Fig. 1.18
QAD Compiler



8 The QAD Compiler Summary Status window displays. Choose Continue.

9 The QAD Log window displays compile progress and error status. When the compile is complete, choose Close to exit.

10 Create a directory `cp` under *`ConfiguratorInstallDir`*`\us` and copy all the `.r` files from *`ConfiguratorInstallDir`* to this directory.

Generate Scripts and Shortcuts

The next steps create startup and shutdown scripts or shortcuts for the CPD database set. You can edit these scripts and icons after you generate them if you choose.

1 In MFG/UTIL for QAD Configurator 4.4.1, select Configure| Database Set Maintenance.

2 The Database Set Configuration window displays. Select the CPD database set.

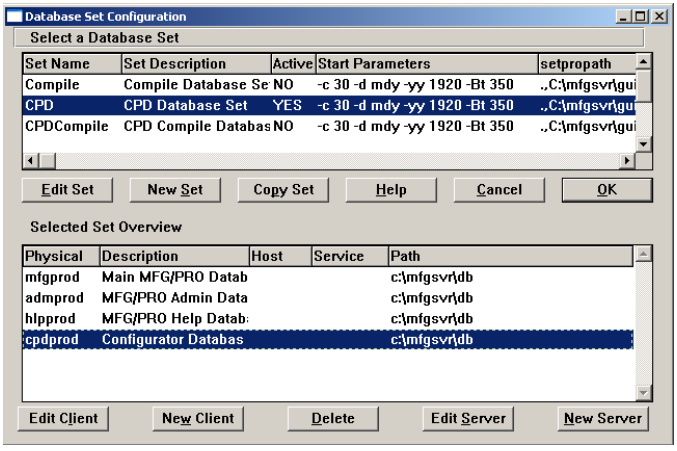


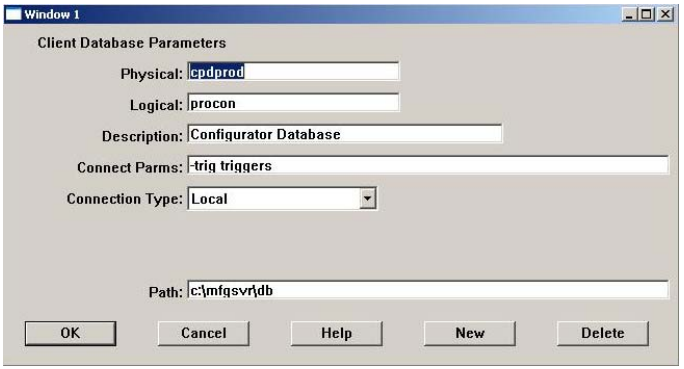
Fig. 1.19
Database Set Configuration

3 Perform the following steps to configure the client view of each database in the CPD database set:

a Select a database and choose Edit Client.

b When the Client Database Parameters screen displays, complete the fields using the following figure and field descriptions as guides.

Fig. 1.20
Client Database Parameters



Physical. Physical name of the database; accept the default if you did not change default database names previously.

Logical. Do not change the logical name for any database.

Description. Optional description of the database.

Connect Parms. Leave this field as-is for default connections.

Connection Type. Choose Local so that the startup scripts use a local host connection to access the database server; choose the client/server option if the client is going to connect to a remote database server using Progress networking.

Path. If you choose a Local connection type, enter or accept the full path to the directory containing the database file (extension `.db`). This should be *`QADERPInstallDir`*`\db`.

Host. If you choose a client/server connection, enter the host name of the machine where the database is located.

Service. For client/server connections, enter a service name for the database that corresponds to an entry in your `\etc\services` file. You must make the entries in the services file separately; the installation does not change this file. When ready, choose OK to continue.

4 Once you have configured each database in the set, verify the database set in the Selected Set Overview frame. Click OK in the Database Set Configuration window.

5 Choose Scripts|Generate Scripts.

6 The Server Script Creation window displays. Select CPD and Choose OK.

7 The program prompts you to confirm the creation of database set icons for each database set. Choose Yes.

8 The Select Icon Folder window displays. Accept the default name or enter a new one. Choose OK.

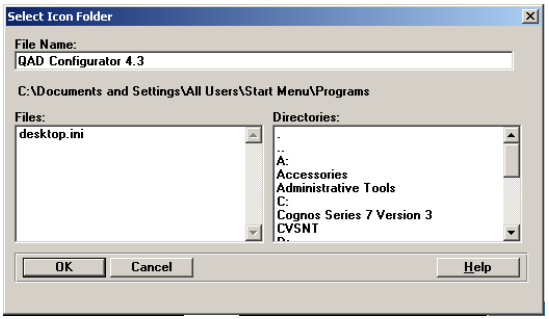


Fig. 1.21
Select Icon Folder

9 The script generation begins. The QAD Log Window displays compile progress and error status. When script creation is complete, choose Close to exit.

10 All the scripts are generated under the *ConfiguratorInstallDir* directory. Open `progress.svg` under *ConfiguratorInstallDir* in a text editor. Verify that the `propath` line is correct:

```
PROPATH=
.,ConfiguratorInstallDir,
ConfiguratorInstallDir\us,
ConfiguratorInstallDir\cpdxrc,
QADERPInstallDir,
QADERPInstallDir\guicli,
QADERPInstallDir\guicli\bbi,
ConfiguratorInstallDir\images.pl,
ConfiguratorInstallDir\hlp
```

Install QAD Configurator AppServer API

If you want to implement the Questionnaire .NET user interface, you must install AppServer API on the QAD .NET UI AppServer machine.

Install QAD Configurator AppServer API Files

1. Launch `install.ksh` (Linux) in the `install` directory on the QAD Configurator CD.
2. Enter 1 to choose QAD Configurator Database Server.
3. A welcome screen displays. Press Enter to view license agreement. Press the spacebar to scroll down the page.
4. Use the following table to enter the appropriate values for script execution.

Table 1.2
Install Script Steps

Step	User Values
License agreement	Specify Yes.
Install log file	Accept the default or enter a new location and name.
Progress installation directory	Enter your Progress installation directory.
Install database, system data, and tool set files for QAD Configurator	Enter No.
Install QAD Configurator AppServer code	Enter Yes.
QAD Configurator AppServer installation directory	Enter the directory in which to install QAD Configurator AppServer API.
Install Configurator WebSpeed code	Enter No.
Install Configurator .NET plug-in	Enter No.
Proceed using these values?	If the values you entered are correct, accept the default. Otherwise, enter No and you will be returned to point where you specified the Progress directory so you can modify previous values.

5. The install script executes. When execution is complete, press Enter to end the script.

Note At the end of the script, the name and location of the installation log file display. You can open the log file in a text editor to check for errors.

6 Open *AppServerInstallDir*/cpd/cop_xrc/pcparm.i in a text editor. Specify mfgversion to be the ERP application service pack version in the file: 5 for QAD 2007, 6 for QAD 2007.1, and 7 for QAD 2008 - Standard Edition.

Compile QAD Configurator AppServer API Files

1 Launch MFG/UTIL for Configurator 4.4.1.

On Windows, from the Start menu, choose All Programs| *ConfiguratorFolderName*|CPD(GUI).

On Linux, execute the following file:

AppServerInstallDir/cpd/cpdutil

2 In MFG/UTIL, select Configure|Database Set Maintenance.

3 The Database Set Configuration window displays. In the database set list, select CPDCompile.

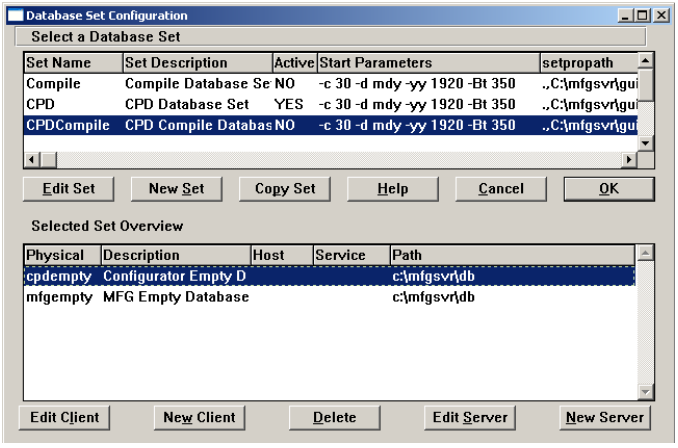


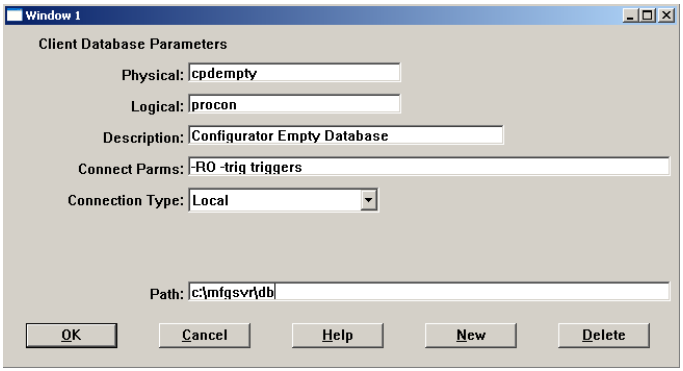
Fig. 1.22 Database Set Configuration

4 Perform the following steps to configure the client view of the cpdempty and mfgempty databases:

a Select a database and choose Edit Client.

b When the Client Database Parameters screen displays, complete the fields using the following figure and field descriptions as guides.

Fig. 1.23 Edit Client Database Parameters



Physical. Physical name of the database; accept the default if there is one.

Path. If you choose a Local connection type, enter or accept the full path to the directory containing the database file (extension `.db`). This should be *`QADERPInstallDir`*`\db`.

Accept the defaults for the rest of the fields.

Connection Type. If the Configurator database is installed on the same machine, choose Local; otherwise, choose ClientServer.

Host. If you choose a client/server connection, enter the host name of the machine where the database is located.

Service. For client/server connections, enter a service name for the database that corresponds to an entry in your `\etc\services` file. You must make the entries in the services file separately; the installation does not change this file. When ready, choose OK to continue.

c When ready, choose OK to continue.

5 Once you have configured each database in the set, verify the database set in the Selected Set Overview frame. Click OK in the Database Set Configuration window.

6 In MFG/UTIL, select Programs|Compile Procedure.

7 The QAD Compiler window displays. Edit the compile propath to add *AppServerInstallDir*`/cpd/qra/erp2.7` and *QADERPInstallDir*`/xrc` to the end of the propath and make sure *AppServerInstallDir*`/cpd/qra/erp2.7` is before *QADERPInstallDir*`/xrc`.

8 Choose Compile.

9 The QAD Compiler Summary Status window displays. Choose Continue.

10 The QAD Log window displays compile progress and error status. When the compile is complete, choose Close to exit.

11 Create a `.pf` file for Ubroker srvrStartupParam configuration, which is used to connect to other QAD ERP databases such as mfgprod and admprod. Specify the full path of the `.pf` file in srvrStartupParam.

```
-db  mfgprod -ld qaddb -H Database_Host_Name -S
mfgprod_DB_Service_Name -trig triggers

-db  admprod -ld qadadm -H Database_Host_Name -S
mfgprod_DB_Service_Name -trig triggers

-db  cpdprod -ld procon -H Database_Host_Name -S
cpdprod_DB_Service_Name -trig triggers
```

12 Create or edit the `ubroker.properties` file using the following typical broker file as a reference.

Note A `ubroker.properties.sample` file can be found in the *AppServerInstallDir*`/cpd` directory for your reference. See the `[UBroker.AS.testcfa92bui1app]` section in the file.

```
[UBroker.AS.cfa92app]
  srvrLogFile=
/qad/web/server/logs/cfa92b/testcfa92bui1app.server.log
  brokerLogFile=
/qad/web/server/logs/cfa92b/testcfa92bui1app.broker.log
  portNumber=48395
  initialSrvrInstance=3
  debuggerEnabled=1
  maxSrvrInstance=15
  autoTrimTimeout=600
```

```
  operatingMode=Stateless
  appserviceNameList=cfa92app
  controllingNameServer=NS1
  environment=testcfa92bui1app
  srvrLoggingLevel=3
  srvrShutdownProc=mfaishut.p
  srvrStartupProc=mfaistrt.p
  uuid=561db2f13e5a0142:12dacd1:1173930de1d:-8000
  description=AppServer Transaction server for testcfa92bui1app
srvrStartupParam=-pf /qad/web/working-directories/cfa92app.pf
  PROPATH=AppServerInstallDir/cpd:
AppServerInstallDir/cpd/us:AppServerInstallDir/cpd/qra/qra.pl:
AppServerInstallDir/cpd/qra/erp2.7:
AppServerInstallDir/cpd/cop_xrc:
AppServerInstallDir/cpd/qra/qra_xrc:$AppShell_Propath:$MFG_PRO:
$MFG_PRO/xrc:.
```

If you modify existing AppShell AppServer configurations, make sure to set the following in the broker file:

```
srvrShutdownProc=mfaishut.p
srvrStartupProc=mfaistrt.p
Also make sure that the following are added before the QAD ERP
path:
AppServerInstallDir/cpd/us:AppServerInstallDir/cpd/qra/qra.pl:
AppServerInstallDir/cpd/qra/erp2.7:
AppServerInstallDir/cpd/cop_xrc:
```

13 If you are running QAD 2007 or QAD 2007.1, recompile the Desktop and QAD ERP codes with the following at the start of the compile propath:

AppServerInstallDir/cpd/qra/erp2.7

See the appropriate QAD ERP installation guide.

Install QAD Configurator WebSpeed Files

1 Launch `install.exe` (Windows) or `install.ksh` (Linux) in the `install` directory on the QAD Configurator CD.

2 Enter 1 to choose QAD Configurator Database Server.

3 A welcome screen displays. Press Enter to view the license agreement. Press the spacebar to scroll down the page.

4 Use the following table to enter the appropriate values for script execution.

Table 1.3
Install Script Steps

Step	User Values
License agreement	Specify Yes.
Install log file	Accept the default or enter a new location and name.
Progress installation directory	Enter your Progress installation directory.
Install database, system data, and tool set files for QAD Configurator	Enter No.
Install QAD Configurator AppServer code	Enter No.
Install Configurator WebSpeed code	Enter Yes.
Install Configurator .NET plug-in	Enter No.
Proceed using these values?	If the values you entered are correct, accept the default. Otherwise, enter No and you will be returned to point where you specified the Progress directory so you can modify previous values.

5 The install script executes. When execution is complete, press Enter to end the script.

Note At the end of the script, the name and location of the installation log file display. You can open the log file in a text editor to check for errors.

6 Create or edit the `ubroker.properties` WebSpeed configuration file located in the *`progressinstalldir`*`/properties` directory. Use the following typical broker file as a reference:

Note Configurator's WebSpeed files only support Apache servers. If there is already a Webspeed configuration deployed on the Apache server, reuse the Webspeed files; otherwise, create them.

Note A `ubroker.properties.sample` file can be found in the *`ConfiguratorWebSpeedInstallDir`*`/cpd` directory for your reference. See the `[UBroker.WS.testcfa92bui1]` section in the file.

```
[UBroker.WS.testcfa92bui1]
  srvrLogFile=
/qad/web/server/logs/cfa92b/testcfa92bui1.server.log
  brokerLogFile=
/qad/web/server/logs/cfa92b/testcfa92bui1.broker.log
```

```
  portNumber=48396
  initialSrvrInstance=1
  maxSrvrInstance=15
  autoTrimTimeout=600
  appserviceNameList=testcfa92bui1
  controllingNameServer=NS1
  environment=testcfa92bui1
  uuid=561db2f13e5a0142:12dacd1:11739307fc5:-8000
  description=WebSpeed Transaction server for testcfa92bui1
srvrStartupParam=-pf /qad/web/working-
directories/testcfa92bui1.pf -p
AppServerInstallDir/cpd/src/web/objects/web-disp.p -weblogerror
  PROPATH=
ConfiguratorWebSpeedInstallDir/cpd/:ConfiguratorWebSpeedInstall
Dir/cpd/src:ConfiguratorWebSpeedInstallDir/cpd/
proxy:ConfiguratorWebSpeedInstallDir/cpd/qra/qra.pl:Configurato
rWebSpeedInstallDir/cpd/qra/erp2.7:ConfiguratorWebSpeedInstallD
ir/cpd/qra/qra_xrc:$MFG_PRO:$MFG_PRO/xrc:.
```

Note The `.pf` file here should have the same database connection as the AppServer `.pf` file.

7 Modify the Web server settings to add an alias to point to *`ConfiguratorWebSpeedInstallDir`*`/cpd/htdocs`.

For example, if your web server is Apache 2 or above, open `httpd.conf`, which is the Apache configuration file. If the alias for Configurator questionnaire is “cfgui”, add the following to this file:

```
Alias /cfgui/ "ConfiguratorWebSpeedInstallDir/cpd/htdocs/"
<Directory "ConfiguratorWebSpeedInstallDir/cpd/htdocs">
  Options Indexes MultiViews
  AllowOverride None
  Order allow,deny
  Allow from all
</Directory>
```

8 Restart the Web server, AdminServer, and WebSpeed Workshop.

9 Compile Configurator WebSpeed files. On the left of the WebSpeed WorkShop UI, click Propath.

10 Enter `compile.html` in the Find File text box and click Submit Query.

11 Click the first matching file that displays.

12 On the next page, select `compile.html` and click the Compile icon.

13 Click the Run icon; then select all the files and click the Compile icon.

14 Open *ConfiguratorWebSpeedInstallDir*/cpd/proxy/AppServerConnection.xml in a text editor and modify the following:

nameServerHost. The host on which the NameServer is running.

nameServerPort. The port or TCP/IP service on which the NameServer is listening.

appServiceName. Name of the OpenEdge AppService in ubroker.properties.

15 Open *ConfiguratorWebSpeedInstallDir*/cpd/src/conf.xml in a text editor and modify the following:

WebContent. The URL address in the format of http://*server_ip/alias_name* where the scripts, images, and styles folders are published. *alias_name* is the Apache server Alias configuration that points to *ConfiguratorWebSpeedInstallDir*/cpd/htdocs

AppserverLog. The error log file directory of APIs that contains detailed error information.

16 If the Configurator WebSpeed is distinct from AppShell's WebSpeed, you need to modify AppShell's client-session.xml file located in the following directory:

$QADHOME*/configurations/*$UI_ConfigurationName

Add the following to the file:

```
<ConfiguratorBaseURL>http://WebSpeed_Server_Address</Configurat
orBaseURL>
<ConfiguratorWebSpeedURI>cgi-bin/wspd_cgi.ksh/WService=
$WebSpeedBrokerName</ConfiguratorWebSpeedURI>
<ConfiguratorProgram>webctrl.p</ConfiguratorProgram>
```

Install QAD Configurator .NET UI Plug-In

1 Launch install.exe (Windows) or install.ksh (Linux) in the install directory on the QAD Configurator CD.

2 Enter 1 to choose QAD Configurator Database Server.

3 A welcome screen displays. Press Enter to view the license agreement. Press the spacebar to scroll down the page.

4 Use the following below to enter the appropriate values for script execution.

Table 1.4
Install Script Steps

Step	User Values
License agreement	Specify Yes.
Install log file	Accept the default or enter a new location and name.
Progress installation directory	Enter your Progress installation directory.
Install database, system data, and tool set files for QAD Configurator	Enter No.
Install QAD Configurator AppServer code	Enter No.
Install Configurator WebSpeed code	Enter No.
Install Configurator .NET plug-in	Enter Yes.
Configurator .NET plug-in installation directory	Enter the directory to install Configurator .NET plug-in. It is normally located in the AppShell *$QADHOME*/packages/plugins directory.
AppShell version	Enter the AppShell version you are running.
Proceed using these values?	If the values you entered are correct, accept the default. Otherwise, enter No and you will be returned to the point where you specified the Progress directory so you can modify previous values.

5 The install script executes. When execution is complete, press Enter to end the script.

Note At the end of the script, the name and location of the installation log file display. You can open the log file in a text editor to check for errors.

6 Modify *$QADHOME*/packages/plugins/manifest.qpkg to add the following in the outmost package node

```
<package ref=
"${Repos}/plugins/qad.plugin.configurator/manifest.qpkg" />
```

7 Install the .NET client via the AppShell's link and `qad.plugin.configurator` will be automatically installed to the client. If the client is already installed, you may either re-install the client or manually unzip the `qad.plugin.configurator/data.zip` file to the client's `plugins` directory.

Set QAD Desktop Connection Timeout (Optional)

If a Configurator questionnaire may take a long time to complete, you need to adjust the QAD Desktop connection timeout through QAD Desktop Connection Manager.

To set QAD Desktop connection timeout, access QAD Desktop and go to Update Configuration Settings in Connection Manager. In the Connection Timeout field, set the value to a number (in milliseconds) large enough to allow for sufficient time to complete a Configurator questionnaire.

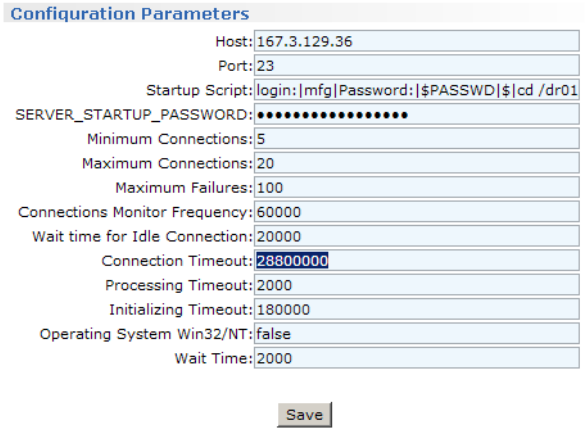


Fig. 1.24 QAD Desktop Configuration Parameters

Implement the German Language

If you are only creating a US English language install, skip this part and proceed to "Set Up QAD Configurator" on page 41.

If you are implementing the German language, you must perform additional steps to create an empty Configurator database for the German language and compile the source code for the language using Translation Manager. Follow these steps to implement the German language.

Create a QAD Configurator Database for the German Language Install

1. Deselect the read-only attribute of all the files in the *ConfiguratorInstallDir*\trans folder.
2. From the Windows Start menu, select All Programs|Progress|Data Administration.
3. The Data Administration screen displays. Select Database|Create.

   Important To implement the German language, the code page of the Progress database must be ISO8859-1.
4. The Create Database window displays. Choose File to navigate to *ConfiguratorInstallDir*\trans\db and enter cpdGEempty.db as the new physical database name; then choose OK.
5. The new database is created. The Connect Database window displays. Choose Cancel.
6. Exit Data Administration.
7. Create a new folder named ge under *ConfiguratorInstallDir*.
8. Open xl_proj.d under *ConfiguratorInstallDir*\trans\ge in a text editor and make these changes:
   - Change C:\mfgsvr\guicli\cpd\cpdtrans\db to *ConfiguratorInstallDir*\trans\db.
   - Change C:\mfgsvr\guicli\cpd\cpdxrc to *ConfiguratorInstallDir*\cpdxrc.
   - Change C:\mfgsvr\guicli\cpd\ge\pc to *ConfiguratorInstallDir*\ge\pc.

   Save the changes.
9. From the Windows Start menu, select Run and execute the following command:

   ```
   %DLC%\bin\prowin32.exe  -p _admin.p -E
   ```
10. The Data Administration screen displays. Choose Database|Connect.

11 The Connect Database window displays. Connect to the `cpdGEempty` database you just created and choose OK.

Fig. 1.25 Connect the cpdGEempty.db Database

12 Select Admin|Load Data and Definitions|Data Definitions (.df file).

13 The Load Data Definitions window displays. Enter *`ConfiguratorInstallDir`*`\trans\ge\pctxl42a.df` as the input file; then choose OK.

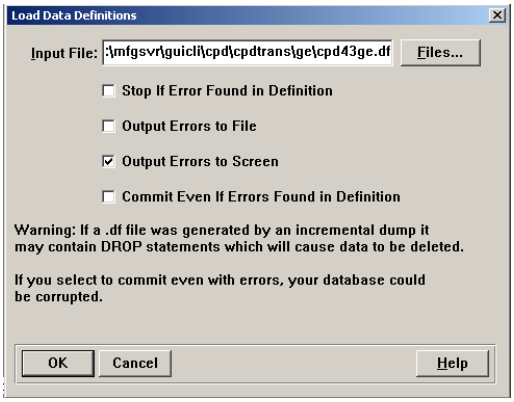
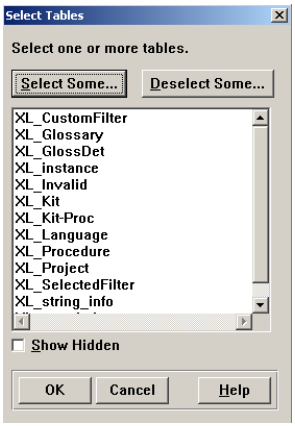


Fig. 1.26 Load Data Definitions

14 A load window displays. When the load is complete, choose OK in the prompt window.

15 Select Admin|Load Data and Definitions|Table Contents (.d file). The Select Tables window displays.

Fig. 1.27
Select Tables



16 Select all the tables in the list. To select all the tables, choose Select Some; then in the Select Tables by Pattern Match window, enter * as the table name and choose OK.

17 Back in the Select Tables window, choose OK.

18 The Load Data Contents for All Tables window displays. Enter *ConfiguratorInstallDir*\trans\ge as the input directory. Select Output Errors to Screen if you want to view error information during the process. Choose OK.

19 A load window displays. When the load is complete, choose Close in the Information prompt window.

20 Exit Data Administration.

Compile the Source Code for the German Language Install

1 Copy the pcparm.i file from *ConfiguratorInstallDir*\trans\ge to *ConfiguratorInstallDir*\cpdxrc and overwrite the old file.

2 Open *ConfiguratorInstallDir*\cpdxrc\pcparm.i in a text editor. Specify mfgversion to be the QAD ERP service pack version in the file: 5 for QAD 2007, 6 for QAD 2007.1, and 7 for QAD ERP2.7.

3 From the Windows Start menu, select Run and execute the following command:

```
%DLC%\bin\prowin32 -c 30 -d mdy -yy 1920 -Bt 350 -D 100
-mmax 3000 -nb 200 -s 128 -ininame
ConfiguratorInstallDir\progress.svg
```

4 The Procedure Editor screen displays. Select Tools|Translation Manager.

5 The Translation Manager window displays. Select File|Database Connections.

6 The Database Connections window displays. Choose Connect.

7 The Connect Database window displays. Connect to *ConfiguratorInstallDir*\db\cpdempty.db and enter procon as the database logical name; then choose OK.

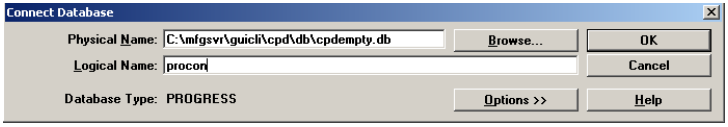


Fig. 1.28 Connect the procon Database

8 Connect to *QADERPGUIInstallDir*\db\mfgempty.db with the logical name qaddb.

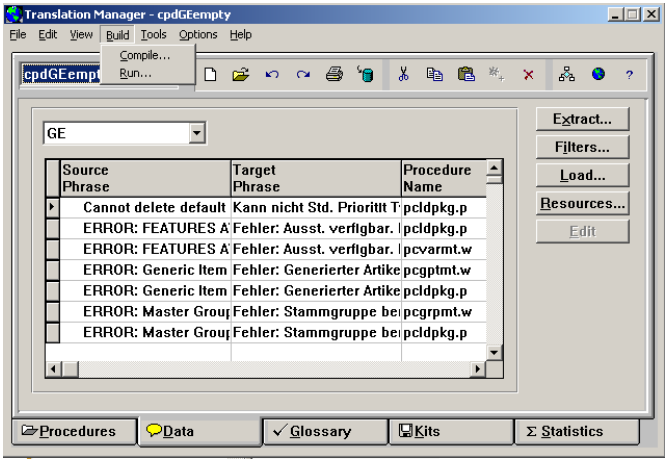
Fig. 1.29 Connect the qaddb Database

Note You must first connect cpdempty.db, then mfgempty.db.

9 Close the Database Connections window. In Translation Manager, choose File|Open or press F3 to open the empty German language database *ConfiguratorInstallDir*\trans\db\cpdGEempty.db.

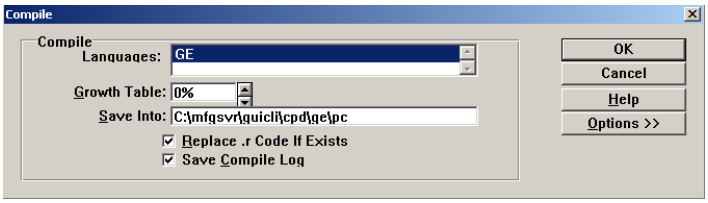
10 The Translation Manager–cpdGEempty window displays. You can choose the Data and Glossary tabs to view target and source languages. Select Build|Compile.

Fig. 1.30
Translation Manager



11 The Compile window displays. Enter *ConfiguratorInstallDir*\ge\pc in the Save Into field. Choose OK.

Fig. 1.31
Compile for the German Language



12 A compile progress window displays. When the compile is complete, exit Translation Manager and Procedure Editor.

Modify PROPATH for the German Language Install

Open `progress.svg` under *ConfiguratorInstallDir* in a text editor. Modify the `propath` line to the following:

```
PROPATH=
.,ConfiguratorInstallDir,
ConfiguratorInstallDir\ge,
ConfiguratorInstallDir\us,
ConfiguratorInstallDir\cpdxrc,
MFGPROGUIInstallDir,
MFGPROGUIInstallDir\bbi,
ConfiguratorInstallDir\images.pl,
ConfiguratorInstallDir\hlp
```

Save your changes.

The implementation of the German language is complete.

Set Up QAD Configurator

Before you can use QAD Configurator, you must set up the system first. To set up the system for proper use, you need to:

- Set the CPD Products Control File.
- Set up groups.
- Set up users.
- Set up parameters.

Set the CPD Products Control File

Follow these steps to set the CPD Products Control File:

1. From the Windows Start menu, choose All Programs|*ConfiguratorFolderName*|Start CPD.
2. The QAD Configurator database starts. From the Windows Start menu, choose All Programs|*ConfiguratorFolderName*|GUI client for CPD.
3. Once the ERP application starts, log in to the system. Enter menu number 99 and press Enter, or locate CPD Products Control File on the Custom menu.
4. The CPD Products Control File screen displays. Set QAD Configurator to yes.

Fig. 1.32 CPD Products Control File

5. Select User Menu|Exit to exit.

Set Up Groups

When QAD Configurator is installed, you access the application by automatically logging in as a default user named QAD. You must use this user account to create groups and user accounts for system administrators in QAD Configurator so that the assigned administrators can access and maintain the system later. After you have created group and user accounts for administrators, you must delete the user QAD from QAD Configurator.

Note You must create groups first before creating user accounts in QAD Configurator.

Note QAD Configurator groups have nothing to do with the security groups in the ERP application.

1 In the ERP application main menu, enter menu number 50 and press Enter, or locate QAD Configurator on the Custom menu to launch QAD Configurator. The QAD Configurator main menu displays.

Fig. 1.33
QAD Configurator Main Menu

2 In the QAD Configurator main menu, select Menu|QAD Configurator Setup Menu|Group Maintenance.

3 The Group Maintenance window displays. Enter Admin in the Master Group field; then choose Done.

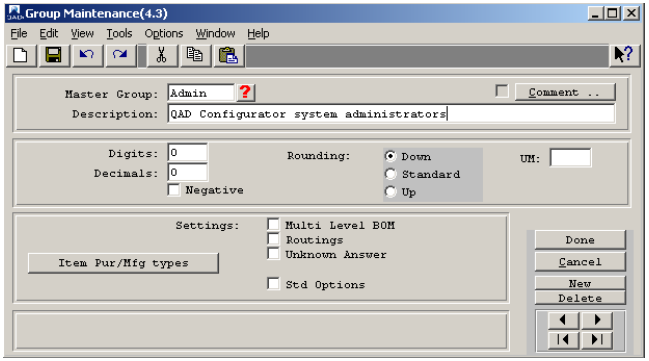


Fig. 1.34
Group Maintenance

4 The Admin group is created. You can repeat steps 2 and 3 to create more groups if you want.

See *User Guide: QAD Configurator* for additional information on Group Maintenance.

Set Up Users

Follow these steps to set up users:

1 In the QAD Configurator main menu, select Tools|Customize|Users.

2 The User Maintenance window displays.

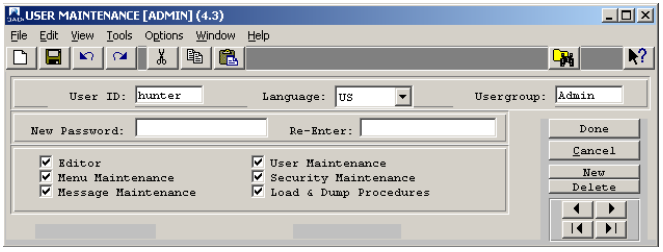


Fig. 1.35
User Maintenance

Enter the following information in the fields:

Field	Value
User ID	Enter administrator's name.
Language	Select the language version of QAD Configurator for the user. QAD Configurator currently supports the US English and German languages. You must first perform the German language install to use this language version.
User Group	Enter the Admin group previously created as the group for administrators.
Password and confirmation	Enter the password for the user; re-enter it to confirm.
Access rights	Select all access rights options for administrators.

3 Choose Done.

4 The user is created. Repeat steps 1 through 3 if you want to create more users.

Users created in QAD Configurator are specific to the application. However, if an identical user ID is found in the ERP system database, the user is automatically logged in to QAD Configurator when accessing the system from the ERP application.

5 Use the navigation buttons (left and right arrows) to locate the default user QAD.

6 Choose Delete to remove the user QAD from the system. When prompted for confirmation, choose Yes. The user QAD is deleted from QAD Configurator.

Important The default user QAD must be deleted before other users can log in to QAD Configurator properly.

See *User Guide: QAD Configurator* for additional information on User Maintenance.

7 Make sure that the ERP application users you have created accounts for to log in to QAD Configurator do not have access to multiple domains in QAD ERP. Use User Maintenance (36.3.1) to assign only one domain for these users if necessary.

The setup is complete. The user accounts you have created can be used to access, maintain, and use the system. See *User Guide: QAD Configurator* for additional information on starting and using QAD Configurator.

Set Up Parameters

Use QAD Configurator Parameter Maintenance to maintain a number of parameters that govern the overall running of QAD Configurator.

When you select this option from the QAD Configurator Setup menu, the system displays the following screen.

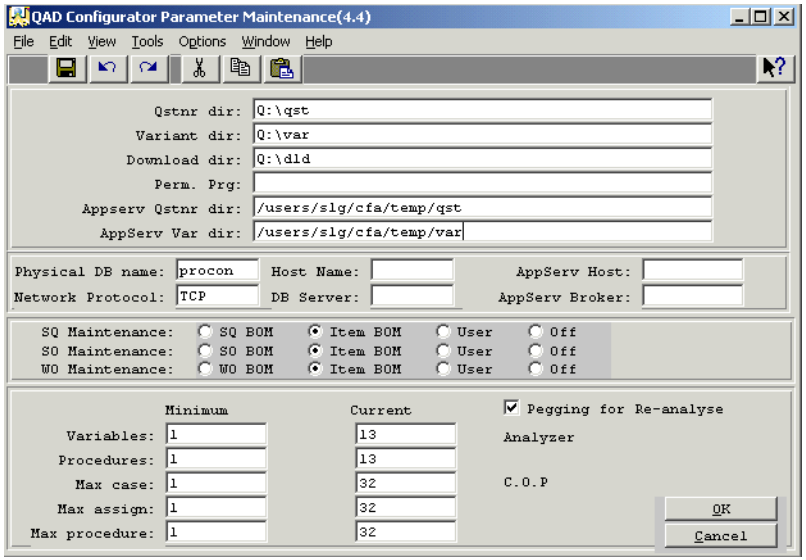


Fig. 1.36 Parameter Maintenance

Enter values for the following fields:

Qstnr dir. Use this field to specify the directory, other than the QAD Configurator startup directory, where files used by the questionnaire will be stored. These files are generated by the Analyzer and contain the inclusion and exclusion logic for features and options.

If you have implemented the .Net UI Questionnaire, make sure Appserv Qstnr dir and Qstnr dir share the same contents:

- If Configurator GUI and AppServer are installed on the same machine, the two directories should be the same.

- If Configurator GUI is installed on a Windows machine and AppServer is installed on a Linux machine, use the Samba service to share Appserv Qstnr dir (for example, `/users/slg/cfa/temp/qst`) with Windows; then on the Windows machine, choose My Computer|Tools|Map Network Drive and map the Q:\ drive to `/users/slg/cfa/temp/` and then configure Q:\qst as the Qstnr dir.

Variant dir. Use this field to specify the directory, other than the QAD Configurator startup directory, where files created by Variant BOM Generator will be stored. These files contain the variant BOM and variant routing information.

If you have implemented the .Net UI Questionnaire, make sure AppServ Var dir and Variant dir share the same contents:

- If Configurator GUI and AppServer are installed on the same machine, the two directories should be the same.
- If Configurator GUI is installed on a Windows machine and AppServer is installed on a Linux machine, use the Samba service to share Appserv Var dir (for example, `/users/slg/cfa/temp/var`) with Windows; then on the Windows machine, choose My Computer|Tools|Map Network Drive and map the Q:\ drive to `/users/slg/cfa/temp/` and then configure Q:\var as the Qstnr dir.

Download dir. This field is used with Nomadic features, which are not supported in this version. Leave the field blank.

Perm. Prg. You can use this field to enter a specific UNIX command to allow overwriting of other users' files. Leave this field blank to prevent overwriting of files when security is set on file level.

Appserv Qstnr dir. Use this field to specify the directory on the AppServer where files used by the .NET UI questionnaire will be stored. These files are generated by the Analyzer and contain the inclusion and exclusion logic for features and options.

If you have implemented the .Net UI Questionnaire, make sure Appserv Qstnr dir and Qstnr dir share the same contents:

- If Configurator GUI and AppServer are installed on the same machine, the two directories should be the same.

- If Configurator GUI is installed on a Windows machine and AppServer is installed on a Linux machine, use the Samba service to share Appserv Qstnr dir (for example, `/users/slg/cfa/temp/qst`) with Windows; then on the Windows machine, choose My Computer|Tools|Map Network Drive and map the Q:\ drive to `/users/slg/cfa/temp/` and then configure Q:\qst as the Qstnr dir.

AppServ Var dir. Use this field to specify the directory on the AppServer where files created by Variant BOM Generator will be stored and will be used by the .NET UI questionnaire. These files contain the variant BOM and variant routing information.

If you have implemented the .Net UI Questionnaire, make sure AppServ Var dir and Variant dir share the same contents:

- If Configurator GUI and AppServer are installed on the same machine, the two directories should be the same.

If Configurator GUI is installed on a Windows machine and AppServer is installed on a Linux machine, use the Samba service to share Appserv Var dir (for example, `/users/slg/cfa/temp/var`) with Windows; then on the Windows machine, choose My Computer|Tools|Map Network Drive and map the Q:\ drive to `/users/slg/cfa/temp/` and then configure Q:\var as the Qstnr dir.

Physical DB name, Network Protocol, Host Name, Database Server.

These fields are used with Nomadic features, which are not supported in this version. Leave the fields blank.

Re-analyze. If you select the Pegging for Re-analyze check box, QAD Configurator will force re-analysis of the relevant generic item and all higher level generic items whenever a rule is changed at some level of the product structure. QAD Configurator enters No in the Analyzed field of the Generic Item Maintenance window for the affected generic items.

This check box is normally deselected only when you are testing temporary rule changes and want to save excess analysis time.

SQ, SO, WO Maintenance. Use these options to select the type of entry that QAD Configurator will use to store sales quote, sales order, and work order information.

The first buttons (SQ BOM, SO BOM, and WO BOM) are not currently in use. The Item BOM buttons cause QAD Configurator to generate a variant item BOM and routing when the questionnaire creates a result. The User buttons let the user decide whether to create an item BOM and routing when creating a result. The Off buttons prevent the creation of an item BOM and routing.

Chapter 2

Upgrading QAD Configurator

Overview

The steps of upgrading from QAD Configurator 4.3 and 4.3.1 to the current version are the same, but they vary slightly depending on how you implemented previous versions of QAD Configurator with the ERP application.

General upgrading steps are as follows:

1. Updating Database Schema
2. Installing QAD Configurator 4.4.1 Over an Existing Instance
3. Dumping Existing QAD Configurator Data
4. Installing New QAD Configurator 4.4.1 Instance

   Note This step is only required if you implemented multiple QAD Configurator instances for multiple domains
5. Loading Existing QAD Configurator Data

Prior to Upgrading QAD Configurator

If your existing QAD Configurator system uses an earlier Progress version, upgrade it to OpenEdge10.1A or up first. See Progress documentation for information on how to upgrade Progress.

QAD Configurator 4.4.1 only works with QAD 2007, QAD 2007.1, and QAD 2008 - Standard Edition. If you are using previous versions of the QAD ERP application, you must first upgrade to a supported version. If you want to implement the .NET UI version of QAD Configurator Questionnaire, you must upgrade to QAD 2008 - Standard Edition. See the installation documentation for that version for information.

Back up your QAD Configurator production environment prior to upgrading.

Upgrading Steps

Updating Database Schema

Use the following steps to load the new data definitions to update your existing QAD Configurator database schema. If you implemented multiple QAD Configurator instances for multiple domains, you must repeat these steps for each QAD Configurator instance.

1. Access the appropriate Data tool (the Data Administration tool if you are using a graphical interface or the Data Dictionary if you are using a character interface).
2. Choose Database|Connect and Connect to the Configurator production database.
3. Choose Admin|Load Data and Definitions|Data Definitions (.df files).
4. The Data tool prompts you for the name of the file that contains the data definitions you want to load into the current database. Specify `\cpd_db\db\43-44.df` located in the QAD Configurator installation CD; then OK to start loading the new data definitions.
5. When loading is complete, you return to the Data Administration or Data Dictionary main window. The existing QAD Configurator database schema is updated.

Installing QAD Configurator 4.4.1 Over an Existing Instance

Install QAD Configurator 4.4.1 to overwrite your existing QAD Configurator instance. See “Installing QAD Configurator” on page 5 for information on how to install QAD Configurator 4.4.1.

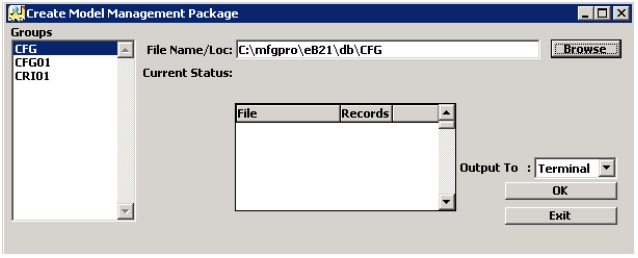
If you implemented multiple QAD Configurator instances for multiple domains, you must perform this for each QAD Configurator instance.

Dumping Existing QAD Configurator Data

Use the following steps to export all existing QAD Configurator data to a package file. If you implemented multiple QAD Configurator instances for multiple domains, you must repeat these steps for each QAD Configurator instance.

1. Launch QAD Configurator.
2. Choose QAD Configurator Setup Menu|System Management Menu|Model Management Menu|Create Package.
3. In the Create Model Management Package window, select a group and specify a path and package file name; then click OK. QAD Configurator will automatically populate the necessary domain fields with the correct information of the domain the user logs in to.

Fig. 2.1
Create Data Package



4. After the package is created, a terminal window displays. Close the terminal window.
5. Repeat step 3 and 4 for each group you want to export data from and use a different file name for each package.
6. Click Exit to close the window.

Installing New QAD Configurator 4.4.1 Instance

Skip this step if you only implemented a single QAD Configurator instance.

If you implemented multiple QAD Configurator instances for multiple domains, you must install a new QAD Configurator instance to consolidate all previous domain-specific installations. See “Installing QAD Configurator” on page 5 for information on how to install QAD Configurator 4.4.1.

Loading Existing QAD Configurator Data

Use the following steps to load data packages generated in “Dumping Existing QAD Configurator Data” on page 52 to QAD Configurator 4.4.1. If you created multiple data package files from multiple domains, repeat these steps to load data into corresponding domains.

1. Launch QAD Configurator 4.4.1, logging in to the domain you want to load data into.
2. Load QAD ERP data.

   Important Skip this step if you have not upgraded your QAD ERP application.

   a. Choose QAD Configurator Setup Menu|System Management Menu|Model Management Menu|Load MFG/PRO Data.

   b. In the Apply Model Management Package window, specify the data package file (`.pkg`) and load data from the file. Repeat this step for each package file you want to load.
3. Load QAD Configurator data.

   a. Choose QAD Configurator Setup Menu|System Management Menu|Model Management Menu|Load QAD Configurator Data.

   b. In the Apply Model Management Package window, specify the data package file (`.pkg`) and load data from the file. If you created multiple data packages from multiple groups, repeat this step for each package file.

Loading Configurator 4.3 Package into Configurator 4.4.1

Use the following steps to load a data package generated by Configurator 4.3 (including 4.3.1) for MFG/PRO eB2.1 into Configurator 4.4.1.

1. Rename the data package file extension from `.pkg` to `.pkg.`43 or `.pkg.`431 depending on your source Configurator version; for example, rename `test.pkg` to `test.pkg`.43.
2. Launch Configurator 4.4.1.
3. Log in to the same domain as the one the data package was created from; for example, if the pt_mstr record in the data package pertains to the QP domain, log in to the QP domain in Configurator 4.4.1 to load this data package.
4. Use the Load MFG/PRO Data menu to load QAD ERP data.
5. Use the Load QAD Configurator Data menu to load Configurator data.

Note Loading a data package generated from Configurator 4.3 for MFG/PRO eB2 or prior is not supported.

Appendix A

Progress Configuration File

The `Progress.svg` file in the *`ConfiguratorInstallDir`* directory contains QAD Configurator settings and records some usage information. Some of the settings can also be configured through the QAD Configuration UI.

Use the following parameters to change the QAD Configurator general settings.

Table A.1
QAD Configurator General Settings

Parameter	Description
Userid	Specify the default user ID for logging in to QAD Configurator.
Debug	Indicate whether to run QAD Configurator in debug mode. Yes: QAD Configurator runs in debug mode. In debug mode, debug information is stored in the `PCTRAIL.PRN` file, as well as displayed in the Analyzer report. Additionally, source code created by the Analyzer and COP Batch Compiler is not removed after compilation. No: QAD Configurator does not run in debug mode.
Run-Sources	Determine how QAD Configurator runs source code. Yes: QAD Configurator tries to run source code first before running compiled objects. No: QAD Configurator only runs compiled objects.
COP-rcode-crc	Indicate whether to perform the cyclic redundancy check during the variant creation process. The crc check ensures that the code generated by QAD Configurator (Analyzer and COP Compiler) you use reflects the latest system setup (rules and formulas). If you change a rule and try to run the original code without running Analyzer or COP compiler to regenerate the code, you will be presented with a CRC error message. Yes: Perform the crc check during the BOM and routing creation process. No: Do not perform the crc check. This value should always be set to Yes.

Options Menu settings can also be configured through the Options menu in the UI.

Table A.2
Options Menu Settings

Parameter	Description
Show Button Bar	Indicate whether to show the button bar in the QAD Configurator programs (Yes) or not (No).
Menu Buttons	Indicate whether to show buttons in the QAD Configurator menus (Yes) or not (No).

Parameter	Description
Save Settings on Exit	Indicate whether to save settings when exiting QAD Configurator (Yes) or not (No).
Confirm on Exit	Indicate whether to prompt users for confirmation when they exit QAD Configurator (Yes) or not (No).
Options-messages	Indicate whether to prompt users for confirmation when they perform various operations. Each Y (for Yes) and N (for No) corresponds to one type of confirmation message in the following order: • Auto Save • Save Message • Delete Question • Delete Message • Undo Question • Undo Message • Redo Question • Redo Message • OK Question
Default-messages	Same as Option-messages except that this is the default setting.

Startup settings determine system behavior during startup.

Table A.3
Startup Settings

Parameter	Description
Editor	Specify the program to run when selecting File|Editor.
Logo seconds	Specify how long to display the QAD Configurator logo.
Logo	Indicate whether to show the QAD Configurator logo (Yes) or not (No).
Full-Screen	Indicate whether to start QAD Configurator in full-screen mode (Yes) or not (No).
Start-up sound	Indicate whether to play a sound when starting QAD Configurator (Yes) or not (No).

Use questionnaire settings to customize the default way you use questionnaires and maintain COP rule tables.

Table A.4 Questionnaire Settings

Parameter	Description
Qstnr Answered HL	Indicate whether to display answered higher level questions (Yes) or not (No).
Qstnr Answered LL	Indicate whether to display answered lower level questions (Yes) or not (No).
Qstnr Temporary	Indicate whether to display temporary features (Yes) or not (No).
Qstnr Background	Indicate whether to display background features (Yes) or not (No).
Qstnr - Levels	Specify the number of levels to display in the questionnaire.
Qstnr - Displ.Qstn	Specify the type of questions to display in the questionnaire. • 1: Feature ID • 2: Short questions • 3: Long questions
Qstnr - Sort	Specify how the questions will be sorted. • 1: Navigation ID • 2: Variable ID
Rea Tbl - nbr of cols	Specify the default number of columns for COP rule table maintenance.
Rea Tbl - nbr of rows	Specify the default number of rows for COP rule table maintenance.

The following parameters register last-used values that will be used as defaults the next time the user runs QAD Configurator. In most situations, do not manually modify these values.

Table A.5 Last-Used Information

Parameter	Description
last-msgnbr	Message number
last-var	Variable extent
last-qsttype	Question type
last-varid	Variable
last-feature	Feature
last-resid	Result ID
last-forid	Rule in Rule Maintenance
last-routing	Routing
last-comp	Component

Parameter	Description
last-variant	Variant number
last-group	Group
last-part	Generic item
last-code	Directory for storing `.prn` files
last-dbfield	Database field (external entity)
last-option	Option