



QAD Adaptive Applications
Enterprise Edition

Installation Guide

QAD Automation Solutions:

Data Collection

Introduction
Package Installation for QAD Automation Solutions: Data Collection
Configure EAM for QAD Automation Solutions: Data Collection and Label Printing
Services

70-3343-3.3.0
Data Collection 3.3.0
QAD Enterprise Edition
September 2021

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Change Summary

Product Name Changes

Starting in September 2019, the new name for QAD’s complete portfolio of products is QAD Adaptive Applications. Additionally, QAD Adaptive ERP is the new name for QAD’s flagship ERP solution. QAD Adaptive ERP includes the functionality previously associated with QAD Cloud ERP and QAD Enterprise Applications - Enterprise Edition, plus the QAD Enterprise Platform and Adaptive UX which resulted from the Channel Islands program. Going forward, the terms QAD Enterprise Applications, QAD Cloud ERP, and Channel Islands will be deprecated but will remain in previous documentation and training materials. QAD’s intention is to—as soon as possible—eliminate the use of the deprecated terms going forward.

Change Summary

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

Date/Version	Description	Reference
September 2021/DC v3.3.0	Updated Software and Environment section	page 2
	Removed QDT installation information	--
	Updated the table in the User Login Script and protermcap section where you set the server connection to access EAM	page 5
June 2020/DC v3.2.2	Updated Post Installation step: Loading Field Help	page 7
	Updated the version numbers in the Downloading and Extracting QDT Installation Package section	--
	Updated Software and Environment section	page 2
December 2019/DC v3.2.1	Updated the Patches and Customized Programs statement	page 2
	Updated references to DC v3.2.1	--
	Updated Software and Environment section	page 2
September 2019/DC v3.2	Updated Installing Data Collection Using YAB section	page 4
	Updated Installing Data Collection Using QDT section	page 5
	Changed references to v3.1.0 to v3.1.x	--
September 2018/DC v3.1	Updated Software and Environment section	page 2
	Updated QDT and YAB table in the Overview section	page 4
	Updated Installing Data Collection Using YAB section	page 4
	Updated Installing Data Collection Using QDT section	page 5

Date/Version	Description	Reference
	Updated screenshots in Configure Data Collection for QAD section	page 10
May 2018/DC v3.0-Rev2	Added instructions to install DC using QDT	page 5
March 2018/DC v3.0-Rev1	Update YAB version requirements	page 2
	Updated Patches and Customizations statement	page 2
	Added link to download updated .fhd help file for DC v3.0	page 7
March 2018/DC v3.0	Updated the Software and Environment Requirements section	page 2
	Removed the Unzip Utilities section	--
	Updated Installation Procedure section	page 4
	Updated Locate Artifacts section	page 5
	Updated User Login Script and protermcap section	page 5
	Updated Loading Field Help section	page 7
	Various revisions to Appendix A: Configure EAM for Data Collection and LPS	page 9
	Updated Configure LPS for EAM section	page 16
January 2018/DC v2.1.0-Rev1	Updated the software and environment requirements	page 2
	Updated Ch. 2 Overview	page 4
	Updated Overview and Requirements in Appendix A: Configure EAM for Data Collection and LPS	page 10
October 2017/DC v2.1.0	Updated the software and environment requirements	page 2
	Update the Installation Package section	page 2
	Major revisions to the Installation Procedure section	page 4
	Updated the Post Installation Tasks section	page 5
	Updated the Overview section in Appendix A: Configure EAM for Data Collection and LPS	page 10
August 2017/DC v2.0.1 Rev3	Added note about YAB versions less than version 1.3	page 4
	Changed all references, when applicable, from Data Collection to QAD Automation Solutions: Data Collection	--
February 2017/DC v2.0.1 Rev 2	Removed Appendix A: Installing Transaction Package	--
November 2016/DC v2.0.1 Rev 1	Corrected LPS directories in Configure LPS for EAM section	page 16
September 2016/DC v2.0.1	Rebranded for v2.0.1	--
	Added section: Downloading and Extracting Installation Package	page 4
	Revised section: Installing QAD Automation Solutions: Data Collection Using YAB	page 4
	Revised section: Installing QAD Automation Solutions: Data Collection Using QDT	page 4
	Removed section: Configure QAD Automation Solutions: Data Collection to Utilize ICT Framework	--
	Added section: Loading Field Help	page 7
May 2016/DC v2.0-Rev3	Added steps from Before You Begin section, which was removed, to the Pre-installation section	page 4
	Added "Enter RF Device Information" to post installation steps	page 7
	Added Appendix A: Installing Transaction Package	--
	Added Appendix B: Configure DC and LPS for EAM	page 9

Date/Version	Description	Reference
April 2016/DC v2.0-Rev2	Revised the User Login Script and protermcap section	page 5
April 2016/DC v2.0-Rev1	Changed the title of and revised the post installation ICT section	--
March 2016/DC v2.0	Updated software and environment requirements	--
	Added instructions to install DC using the YAB console	page 4
	Removed Installation Messages section	---
April 2015/DC v1.2.1	Not applicable. First release of QAD Automation Solutions: Data Collection Install Guide	---



Introduction

This chapter discusses the following installation topics for QAD Automation Solutions: Data Collection:

Overview 2

Describes the chapter contents.

Requirements 2

Describes system and software prerequisites that you must meet before installing Data Collection.

Installation Package 2

Describes the contents of the installation package.

Patches and Customized Programs 2

Describes considerations for previously installed patches and customized programs.

Overview

This chapter discusses the installation requirements for QAD Automation Solutions: Data Collection, the installation package, and pre-installation preparations.

Requirements

The following sections describe the software and environment and other requirements for installing Data Collection.

Software and Environment

You must have the following software and environment to install software for Data Collection:

- Enterprise Edition 2016EE or above
- Java Runtime Environment (JRE) 1.6 or above
- Progress 11.6 or above
- YAB 1.6.5 or above
- If installing on a UNIX Server, the zip and unzip packages must be installed
- If installing on a Windows server, the Windows Powershell app must be installed

Installation Package

The Data Collection package contains all the components to install Data Collection.

Note The *QAD Automation Solutions: Data Collection Installation Guide* can be found in the QAD document library:

- <http://documentlibrary.qad.com/>

Patches and Customized Programs

This package contains modifications to QAD programs. If you have made customizations to QAD programs, it is the responsibility of the person(s) who made the customizations to merge those customizations with the modifications included in this package.

Package Installation for QAD Automation Solutions: Data Collection

This chapter describes package installation and post-installation configuration for QAD Automation Solutions: Data Collection.

Overview 4

Provides an overview of the installation process.

Installing Data Collection 4

Provides instructions to install Data Collection using YAB.

Post-installation Tasks 5

Provides instructions to install Data Collection using QDT.

Post-installation Tasks 5

Describes post-installation activities.

Overview

The following sections describe how to install the QAD Automation Solutions: Data Collection package and how to configure the product after installation.

Installing Data Collection

Pre-Installation Tasks

Back up your databases and supporting environments. To back up all databases, execute the command:

```
> yab database-backup
```

Alternatively, to back up a specific database, execute the command:

```
> yab database-[INSTANCE]-backup
```

Downloading the Installation Package

Follow these steps to download the Data Collection installation package:

- 1 Download the add-on .zip file from the QAD Store or from QAD Release Fulfillment.
Example `as-data-collection-3.3.x.x.zip`
- 2 Move the selected file(s) to a file system that is accessible from the UNIX host where your Enterprise Edition environment is installed.
Example `<InstallDir>`

Installing Data Collection

YAB is a configuration management tool you can use to start, stop, reconfigure, and maintain the consistency of your Enterprise Edition environments. Your environment is defined in terms of discrete units, or packages, which you can replace and add as needed.

See [QAD Enterprise Edition Installation Guide](#) for more information about using YAB.

Follow these steps to install Data Collection:

- 1 Change to the directory where Enterprise Edition is installed.
`cd directory`
- 2 Add the packages to the environment:
`yab -i:<path to package>/as-data-collection-3.3.x.x.zip`
- 3 Update the configuration.properties file.
`packages.as-data-collection=3.3.x.x`

Note Remove references to any prior/earlier Data Collection schema and framework versions within the YAB configuration properties files. The schema is now included within the module package. The configuration files can be found at:

```
../build/config/
```



../build/config/system

The values within the property files to search for are:

- data-collection-schema=
- data-collection=
- data-collection-encrypted=
- data-collection-unencrypted=
- as-data-collection * service-pack=
- netui-module-data-collections-schema=
- netui-module-data-collections-unencrypted=
- netui-module-data-collections-encrypted=

4 Update the environment.

> yab update

Proceed to “Post-installation Tasks” on page 5.

Post-installation Tasks

Data Collection post-installation tasks consist of the following:

- Locate Artifacts
- User Login Script and protermcap
- Enter RF Device Information
- Merging Existing Patches and Customizations
- Loading Field Help
- Restarting Anti-Virus

Locate Artifacts

If the directory `<DIST_Dir>/as-setup` is not available, you can find it in the package contents under `../build/catalog/packages/as-data-collection/nn/nn/nn/nn`.

User Login Script and protermcap

The installation package for QAD Automation Solutions: Data Collection contains modifications to the `protermcap.dc` file that Progress uses. The scripts created by YAB during the installation (`client-asdc-xxx`) utilize the `protermcap` file supplied. The login scripts are created and maintained by the installer to ensure that the `propath` values in the scripts are updated during any environmental update that may affect them.

Service Connection and Control File

1 Verify AppServer connection information for Data Collection.

- a Launch the ERP application.
- b Launch Service Connection Maintenance (6.22.1).

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- c Set the AppServer information for the core product to the following:

Field	Setting
Type	Appserver
Name	<the name of the appserver to use> For example, as-eam.
Name Srvr	Yes
URL	default
Port	<port number of the server>
Host	<host name>
WSDL	default
User ID	default
Password	default
Parameter	default

- d Set the server connection to access EAM:

Field	Setting
Type	Direct Appserver
Name	<the name of the appserver to use> For example, as-eam.
Name Srvr	Yes
URL	default
	Note: In environments running OE12 and higher, provide the URL to the server. For example, http://vmlexample.qad.com:26137/aspv -sessionModel -session-free
Port	<port number of the server>
Host	<host name>
	Note: For a secure environment and environments running OE12 and higher, it is mandatory to include the domain name of the host.
WSDL	default
User ID	default
Password	default
Parameter	Yes
Sequence	1
Name	For non-secured environments, enter "-sessionModel session-free". For secured environments, enter "-sessionModel session-free -ssl". Note: Secured environments require a second input character parameter (-ssl) to be appended to this parameter.
Type	INPUT
Datatype	CHARACTER

- 2 Verify control for Data Collection.

- a Launch Data Collection Control (6.22.24).
- b Set the connection name. Enter the connection name that was entered in Service Connection Maintenance (steps c and d); for example, as-eam.



- c Set the environment to the <Name of the environment>; for example, DEVL,Test,Train,PROD.

Enter RF Device Information

If users have RF devices with screen widths greater or less than 40 characters, enter the device information into Device Maintenance (6.22.14). Repeat this step as needed for each device that meets this criteria.

Example Skip this step if all RF devices have a 40 character display.

Field	Setting
Device Type	Enter the name of the device. This name is visible to users when they log in and choose their device.
Screen Width	Enter the number of characters that can be displayed across the devices screen.
Maximum Label Characters	10
Use Data Justification	No

Fig. 2.1
Device Maintenance

The screenshot shows a web browser window with two tabs: 'Processes' and 'Device Maintenance'. The 'Device Maintenance' tab is active. The browser's address bar shows 'Go To', 'Actions', 'Copy', 'Print', and 'Preview' buttons. The form content is as follows:

Device Type: RF Device
 Screen Width:
 Maximum Label Characters:
 Use Data Justification:

Merging Existing Patches and Customizations

The Data Collection installation package contains modifications to the existing QAD EE programs. If you previously applied QAD patches or customizations, merge the QAD patch changes, customizations, and any other changes.

Loading Field Help

There are two field and procedure help files for Automation Solutions: Data Collection v3.3:

- DChelpv330.fhd. Contains the new/updated field definitions for the standard Data Collection framework.
- DChelpLabPre.fhd. Contains new field and program definitions for the label prefix functionality introduced in the v3.3 release.

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Use this procedure to load character-mode online field and procedure help. It does not affect custom help.

- 1 Download the two help files from the following QAD Knowledgebase article (AC-2823):
<https://team.qad.com/pages/viewpage.action?spaceKey=QSM&title=How+to+Install+Help+Files+for+Data+Collection+v3.3+-+AC-2823>
- 2 Place the help files in <Dist Dir>/as setup.
Note If you cannot add the files to the <Dist Dir>/as setup directory, place them in a temporary directory.
- 3 From a single-user EE character session, go to the System Interface menu (36.4) and select Field Help Load (36.4.13.14).
- 4 In Field Help Load, leave Field, Procedure, Status, and Text Type blank.
- 5 Complete the other fields:
Language. Enter an appropriate two-letter language code (such as US for English).
Field Help Load File. Enter the full path to the help data file <DCHelpfile>.fhd.
Note Please note that there is a restriction on the number of characters that can be entered in this field. If you cannot enter the complete path and file name, copy the <DCHelpfile>.fhd file into a temporary directory and then enter the temporary path to the help data file.
Skip loading help with lower status. •Enter Yes.
- 6 Press Go to begin the load.
- 7 Exit Field Help Load when the load is finished.

Restarting Anti-Virus

Restart any anti-virus programs that were shut down to perform the Data Collection package installation.



Configure EAM for QAD Automation Solutions: Data Collection and Label Printing Services

This appendix describes the procedure to install the EAM package.

Overview 10

Requirements 10

Configure Data Collection for QAD 10

Configure LPS for EAM 16

Overview

The following appendix describes how to configure DC and LPS for QAD ERP transaction banners.

For DC and LPS artifacts for EAM, please see the EAM 2017.1 or higher package.

Please contact QAD Services for assistance in retrofitting the transactions on EAM 2016.

Requirements

Before applying the EAM DC LPS package, make sure that the following software has been installed and configured:

- QAD 2016EE or greater.
- EAM 2016 (v13) or greater.
- QAD Automation Solutions: Data Collection 3.0 or greater
- QAD Automation Solutions: Label Printing Services 3.0 or greater

Configure Data Collection for QAD

- 1 Log in to QAD ERP.
- 2 Open Service Connection Maintenance (6.22.1) and create a record for Service Connection by entering the following information:

Field	Setting
Type	Direct Appserver
Name	Enter the name of the EAM AppServer
Name Srvr	Yes
URL	blank
Port	Enter the port number of the EAM AppServer's broker
Host	Enter the host's name of the IP address for the server running the EAM AppServer
WSDL	blank
User ID	blank
Password	blank
Parameter	Yes
Parameter Frame	
Sequence	1
Name	-sessionModel session-free
Type	INPUT
Datatype	CHARACTER



Fig. A.1
Service Connection Maintenance

The screenshot shows a web-based interface for 'Service Connection Maintenance'. The window title is 'Service Connection Maintenance'. At the top, there is a navigation bar with 'Go To', 'Actions', 'Copy', 'Print', and 'Preview' options. The main content area is divided into several sections:

- Type:** Direct Appserver (dropdown menu)
- Name:** qadeam_ASlive
- Name Svr:**
- URL:**
- Port:** 22088
- Host:** vmlinux
- WSDL:**
- User ID:**
- Password:**
- Parameter:**

Below these fields is a section for 'Parameter' configuration:

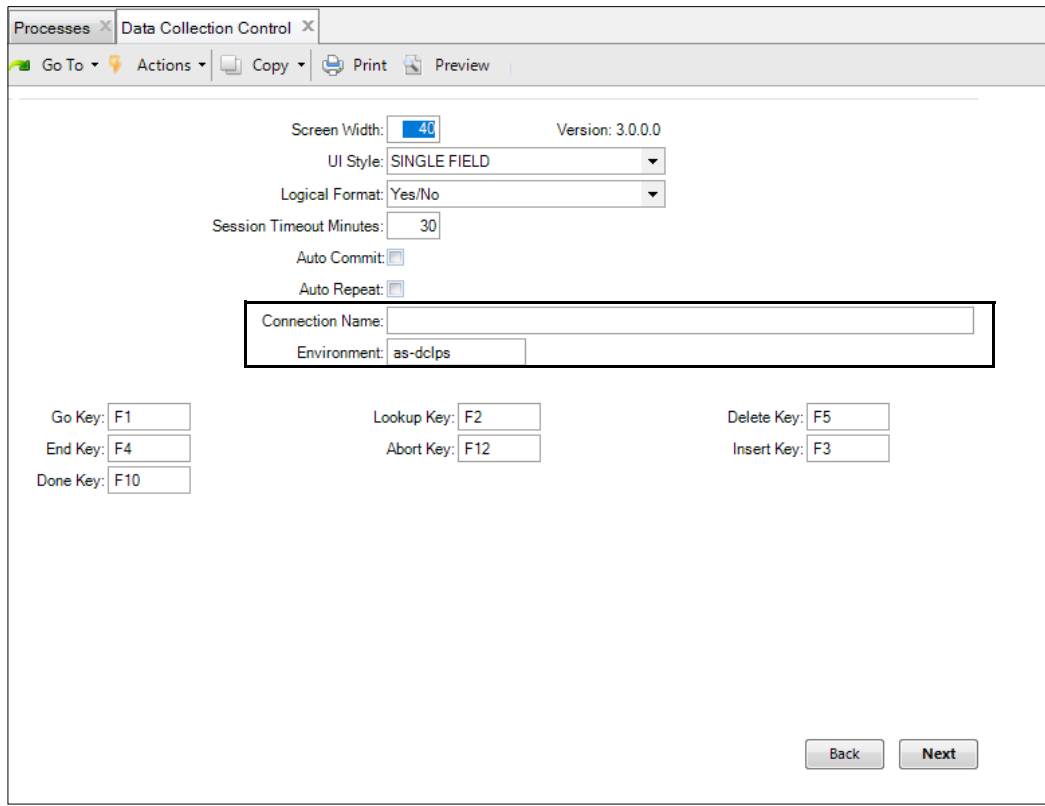
- Sequence:** 1
- Name:** -sessionModel session-free
- Type:** INPUT (dropdown menu)
- Datatype:** CHARACTER (dropdown menu)

At the bottom right, there are three buttons: 'Delete', 'Back', and 'Next'. The text 'Adding new record' is visible at the bottom left of the form area.

- 3 Open Data Collection Control (6.22.24) and enter the following information in the Connection Name and Environment fields.

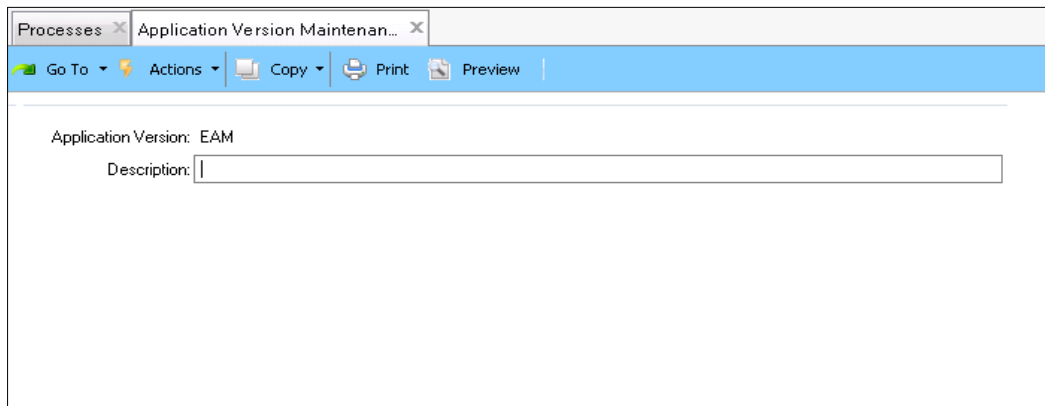
Field	Setting
Connection Name	Enter the name of the EAM AppServer that was entered in the previous step.
Environment	Optionally, identify the environment to users by entering “Test”, “Prod”, “Live”, and so on.

Fig. A.2
Data Collection Control



- 4 Open Application Version Maintenance (6.22.2) and create a record for the Application Version.

Fig. A.3
Application Version Maintenance

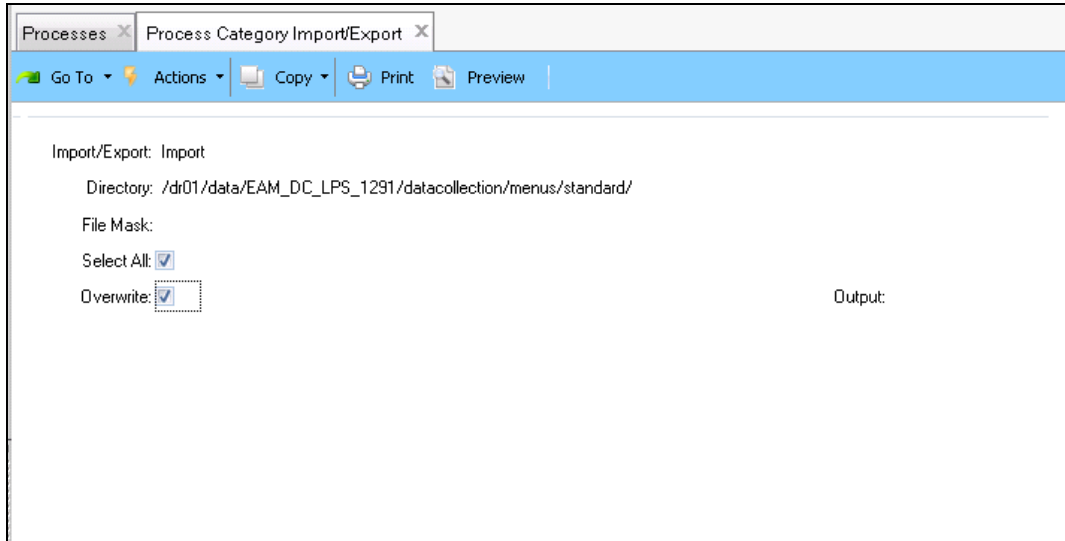


- 5 Open Process Category Import/Export (6.23.1) and import the EAM xml transaction file located in <Dist Dir>/as-setup/menus/eam.

Field	Setting
Import/Export	Import
Directory	Enter the full path to the folder that contains EAM.xml.

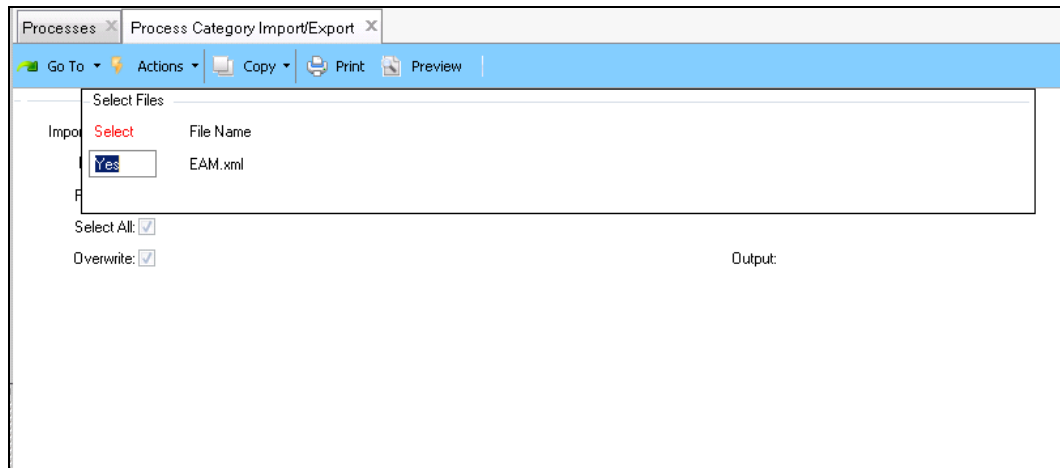
Field	Setting
File Mask	blank
Select All	Yes
Overwrite	Yes

Fig. A.4
Process Category Import/Export



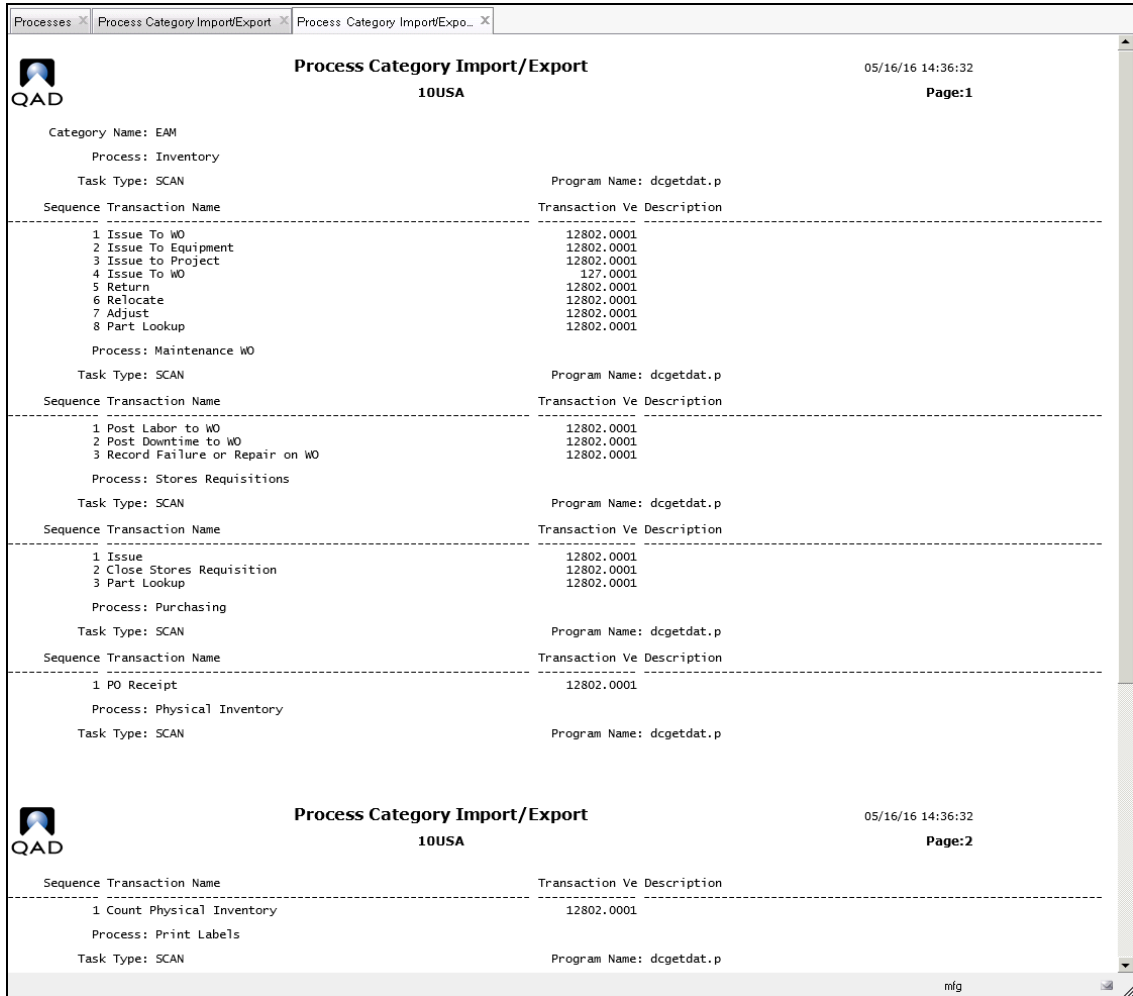
6 Click Next. The Select Files frame is displayed. Click Next.

Fig. A.5
Process Category Import/Export - Select Files



7 Click Next again and output the results to PAGE.

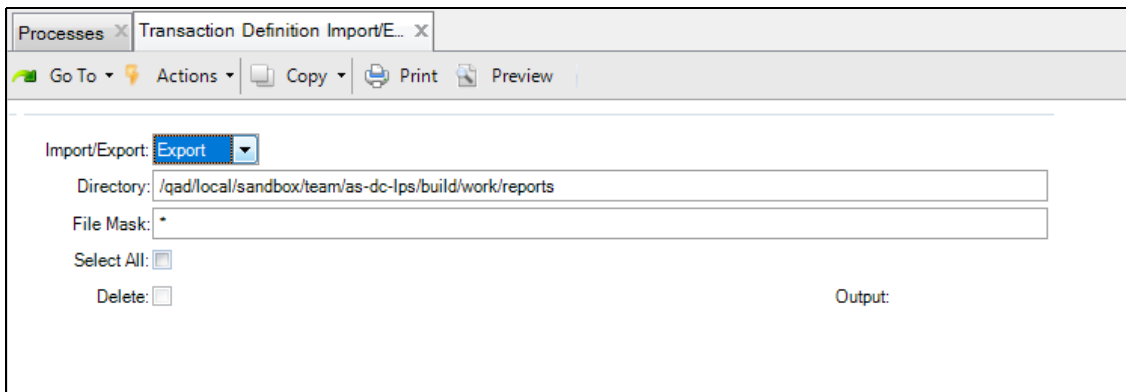
Fig. A.6
Process Category Import/Export - Output



8 Open Transaction Definition Import/Export (6.23.4) and enter the following information to import the EAM DC transaction XML files located in <Dist Dir>/as-setup/transactions/eam.

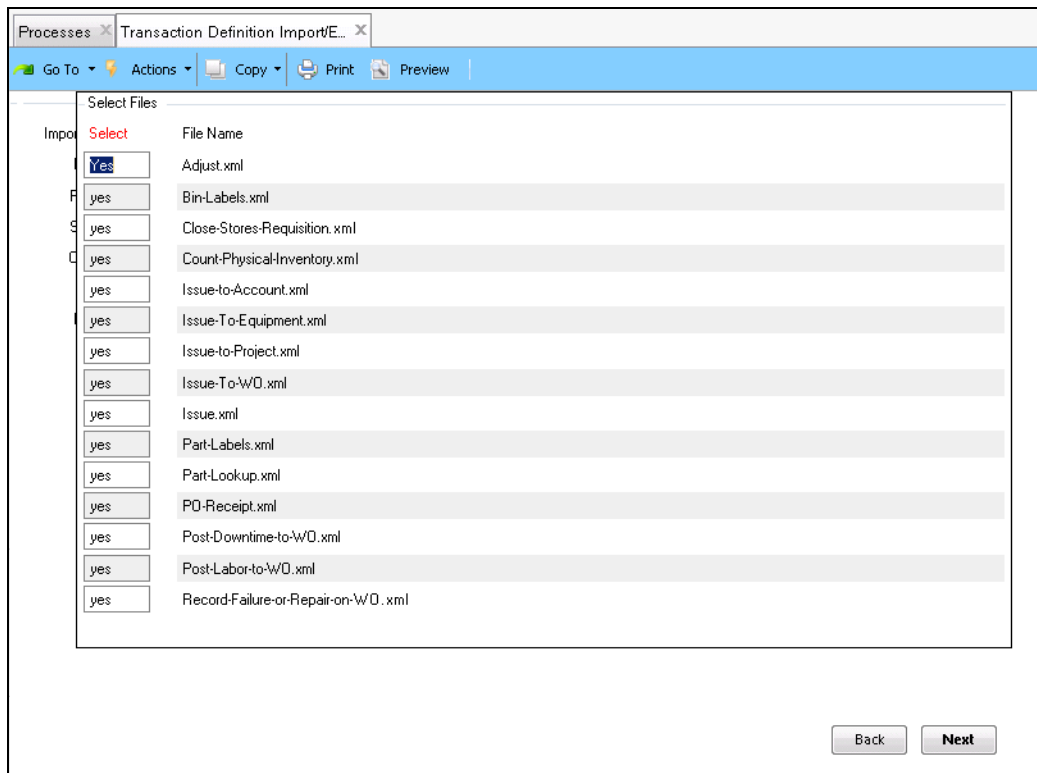
Field	Setting
Import/Export	Import
Directory	Enter the full path to the folder that contains the transaction files, such as "Issue-to-Equipment.xml".
File Mask	*
Select All	Yes
Overwrite	Yes
Delete	No
Include Version in File Name	No

Fig. A.7
Transaction Definition Import/Export



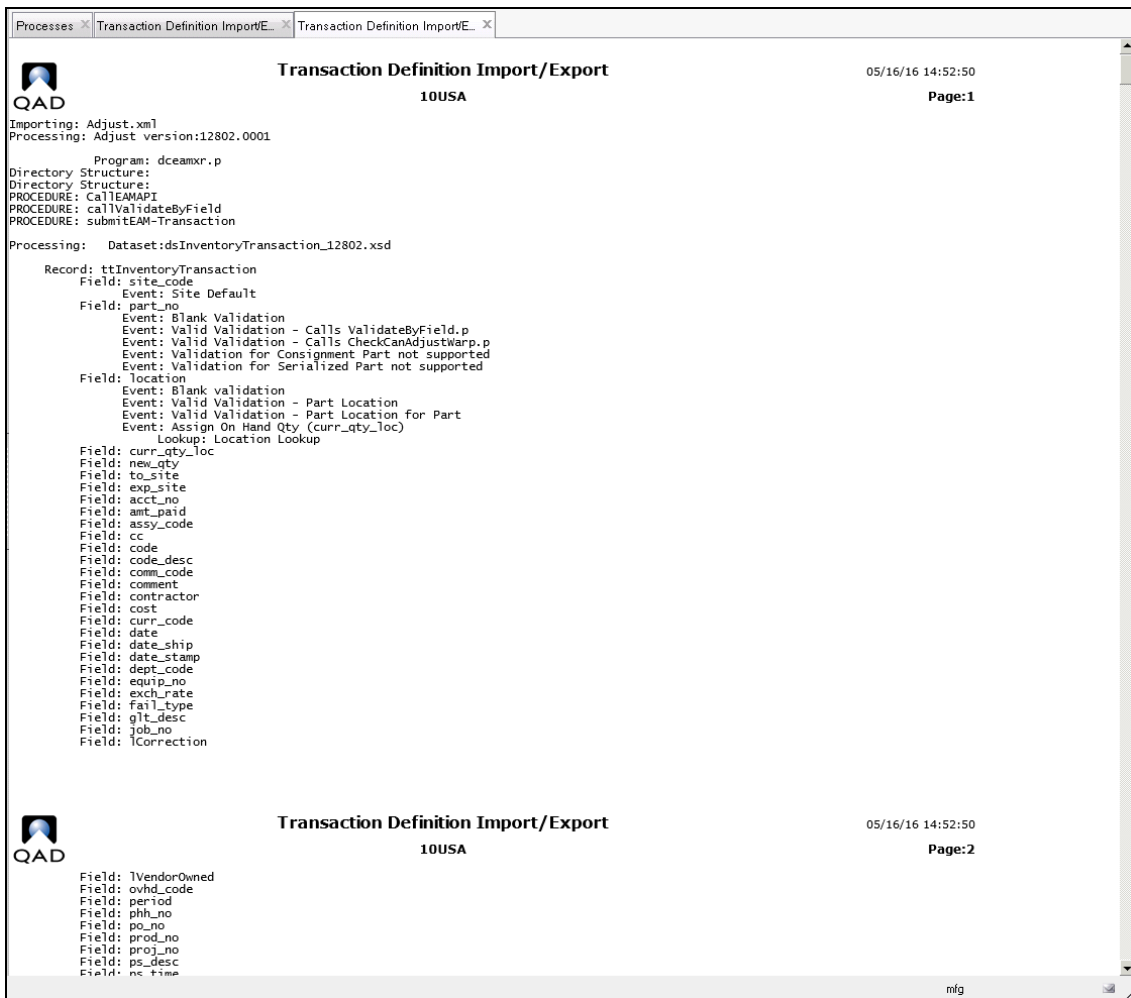
9 Click Next. The Select Files frame is displayed. Click Next.

Fig. A.8
Transaction Definition Import/Export - Select Files



10 Click Next again and output the results to PAGE.

Fig. A.9
Transaction Definition Import/Export - Output



Configure LPS for EAM

- 1 Locate the folders with datasets, templates, and labels that are created when the LMS module is installed. These destinations are useful during the import. For example:

```
/test/lps/templates
```

```
/test/lps/datasets
```

```
/test/lps/output
```

- 2 Copy the datasets from the .../as-setup/labels/datasets/eam folder to the datasets folder found in step 1.
- 3 Copy the templates from the ../as-setup/labels/templates/eam folder to the templates found in step 1.
- 4 If using Software, copy the following files to the Software server machine:

```
../as-setup/labels/loftwarelabelfiles/eam/EAMLocationDefault.lwl
```

```
../as-setup/labels/loftwarelabelfiles/eam/EAMPartDefault.lwl
```



- 5 Log in to QAD ERP and use the following programs to configure various LPS-related settings:
- Label Config Import/Export (36.13.16.16.4)
 - Import (ALL): set directory to `../as-setup/labels/configuration/eam/labelinfo`
 - Import (Printer Only): set directory to `../as-setup/labels/configuration/eam/printer`
 - Import (Format only): set directory to `../as-setup/labels/configuration/eam/format`
 - Label Printer Connection Maint (36.13.16.1.1)
 - Label Printer Syntax Type Maint (36.13.16.1.2)
 - Printer Model Maintenance (36.13.16.1.3)
 - Print Queue Maintenance (36.13.16.1.4)
 - Label Printer Maintenance (36.13.16.1.5)
 - Label Template Maintenance (36.13.16.1.7)
 - Label Format Maintenance (36.13.16.1.9)
 - Label Content Routing Config (36.13.16.1.16)



Product Information Resources

QAD offers a number of online resources to help you get more information about using QAD products.

[QAD Forums \(community.qad.com\)](https://community.qad.com)

Ask questions and share information with other members of the user community, including QAD experts.

[QAD Knowledgebase \(knowledgebase.qad.com\)*](https://knowledgebase.qad.com)

Search for answers, tips, or solutions related to any QAD product or topic.

[QAD Document Library \(documentlibrary.qad.com\)](https://documentlibrary.qad.com)

Get browser-based access to user guides, release notes, training guides, and so on; use powerful search features to find the document you want, then read online, or download and print PDF.

[QAD Learning Center \(learning.qad.com\)*](https://learning.qad.com)

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