



Installation Guide **QAD Trade Activity Management**

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QAD TAM Installation Guide Change Summary

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

Date/Version	Description	Reference
May 2018/2.3	Updated the installation instructions	--
	Added instructions for updating TAM 2.1 to 2.3	page 8
November 2017/2.2	Initial release of the Installation Guide	--

Overview

This chapter includes the introduction to TAM installation and the prerequisites for installation.

QAD TAM Installation Overview 2

QAD TAM is installed on QAD EE and works with QAD EF. This section explains where you can get the instructions for installing QAD EE and EF.

Prerequisites 2

Describes the required tools and applications for installing QAD TAM.

QAD TAM Installation Overview

QAD Trade Activity Management is installed into a QAD Enterprise Edition 2016 or 2017 environment. Before installing TAM, you must first install and configure QAD Enterprise Edition. QAD Enterprise Edition is installed using QAD Enterprise Edition installer and is managed using the QAD YAB client. YAB is a deployment and management toolset that covers all products installed into an Enterprise Edition environment.

See [QAD Enterprise Edition Installation Guide \(2016\)](#) or [QAD Enterprise Edition Installation Guide \(2017\)](#) for more information about using YAB.

QAD Enterprise Financials 2017.1 is required to work with QAD TAM. Enterprise Financials can be upgraded independently from Enterprise Edition Core. This capability allows you to implement an Enterprise Financials 2017.1 instance in an Enterprise Edition 2016 implementation.

See [QAD Enterprise Financials 2017.1 EE, 2016 EE Backward Compatibility Installation Guide](#) for instructions on how to install QAD Enterprise Financials 2017.1 EE on QAD 2016 EE.

Prerequisites

Before you install QAD TAM, ensure that all the following required applications and tools are properly installed and configured.

- Python 2.4 or later versions of Python 2 Release
- YAB 1.7.0.127
- QAD Enterprise Application
 - QAD 2017 EE and the latest cumulative patches
 - mfg-patch-2017.0.17.606.zip
 - netui-3.3.0.58.zip
 - netui-module-33-cumulative-3.3.0.58.zip or later versions

Or

- QAD 2016 EE and the latest cumulative package
 - mfg-ee2016-patch-2016.0.16.542.zip
 - netui-3.2.0.62
 - netui-module-32-cumulative-3.2.0.62.zip
- QAD Enterprise Financials 2017.1

Installing and Upgrading TAM

This chapter describes the installation and upgrade of QAD Trade Activity Management.

Preparation for Installation 4

Explains the pre-installation tasks required for installing TAM.

Installing TAM 6

Instructions on how to install TAM.

Upgrading TAM 2.1 to TAM 2.3 8

Explains how to upgrade TAM 2.1 to TAM 2.3 on QAD 2016 EE.

Preparation for Installation

Before installing TAM, you must finish the following pre-installation tasks:

- 1 Configuring Python
- 2 Installing YAB Update
- 3 Installing QAD EE Patches
- 4 Installing QAD Enterprise Financials
- 5 Configuring QRA Storage Areas

Configuring Python

Before installing TAM, ensure that the required Python version is installed. If you have not installed Python, go to the official website of Python to download the installer and install it.

To check the Python version, run:

```
> /usr/bin/python -v
```

The existing shell scripts are backed up into the `scripts/backup` directory.

Configure Python settings to locate a compatible Python runtime. To configure the `python.executor` setting, run:

```
vi build/config/configuration.properties
python.executor=/usr/bin/python
```

Installing YAB Update

If you have installed QAD Enterprise Application, the YAB Client is installed into the `build/client` directory and a shell script named `yab` is created in the installation directory to run the client. You do not need to take any steps to install the YAB client.

Before you install TAM onto QAD EA, ensure that the YAB for Enterprise Edition (`yab-ee-app` package) installed on your system is version 1.7.0.127. If the installed YAB is older than the required version, follow these steps to install an update to YAB:

- 1 Download the YAB package `yab-ee-image-1.7.0.127.zip` from the QAD Store.
- 2 Move the file to a file system that is accessible from the UNIX host where your Enterprise Edition environment is installed.
- 3 Enter:

```
yab install yab-ee-image-1.7.0.127.zip
```

Installing QAD EE Patches

Ensure that the required QAD Enterprise Application and the required patches are installed before installing TAM.

The patches are:

QAD EE Version	Patches
QAD 2017 EE	mfg-patch-2017.0.17.606
	netui-3.3.0.58
	netui-module-33-cumulative-3.3.0.15
QAD 2016 EE	mfg-ee2016-patch-2016.0.16.542
	netui-3.2.0.62
	netui-module-32-cumulative-3.2.95.0

To check the installed version, run:

```
yab info | grep -e netui -e patch
```

You will see a response similar to the following:

```
coli24: EE2017 $ yab info | grep -e netui -e patch
mfg-patch                2017.0.17.606      remote
netui                    3.3.0.62           remote
netui-module-32-cumulative 3.3.0.15           remote
```

If the patches are not installed, install them following the instructions in [QAD Enterprise Edition Installation Guide \(2016\)](#) or [QAD Enterprise Edition Installation Guide \(2017\)](#).

Installing QAD Enterprise Financials

Note If you are using QAD 2017 EE, QAD Enterprise Financials 2017.1 is already installed. You do not need to install QAD Enterprise Financials separately.

QAD Enterprise Financials 2017.1 is required for using TAM 2.3. See [QAD Enterprise Financials 2017.1 EE, 2016 EE Backward Compatibility Installation Guide](#) for instructions on how to install QAD Enterprise Financials 2017.1 EE on QAD 2016 EE.

Configuring QRA Storage Areas

Note If you are installing TAM 2.3 on QAD 2017 EE, skip the steps of configuring QRA storage areas.

QRA storage areas are required in the database. Follow these steps to add the storage areas:

- 1 Copy existing definition file `mfgdb-qla.st`.

```
cp build/work/st-files/mfgdb.st build/work/st-files/mfgdb-qla.st
```

- 2 Modify the copied file to include the following new areas.

```
d "QRA":13,64;8 ./ f 512
d "QRA":13,64;8 ./
#
d "QRA_IDX":14,1;8 ./ f 512
d "QRA_IDX":14,1;8 ./
#
d "QRA_LOB":15,1;8 ./ f 512
d "QRA_LOB":15,1;8 ./
```

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Note `./` can be replaced with the full path to the database directory.

- 3 Review the storage area numbers and ensure that each number is unique within the structure file.
- 4 Review the extents defined to ensure that they have the required size.
- 5 Update the properties in `configuration.properties`.

```
# @noappend
db.qaddb._structurefile=${appdir}/build/work/st-files/mfgdb-gra.st
db.qaddb.structurefile=${appdir}/build/work/st-files/mfgdb-gra.st
```

Installing TAM

Follow these steps to install TAM:

- 1 Get the TAM 2.3 installation package from the QAD Store or from QAD Release Fulfillment.
- 2 Enable WSA webservices in `configuration.properties`.

```
vi build/config/configuration.properties
# -----
# QRA Webservices
# -----
webserviceadapter.enabled=true
qra.webservices.enabled=true
```

- 3 Modify `configuration.properties` to set the value of environment namespace and default App.

```
vi build/config/configuration.properties

qra.config.environment.environmentnamespace=com.extensions
qra.config.environment.defaultappname=QadExtensions
```

Note These values are just examples; the actual values will be different for each customer.

- 4 Modify `configuration.properties` to exclude the packages that are not required.

```
vi build/config/configuration.properties

dependency.excludes=analytics-core-webui,analytics-core-webui-translations,analytics-
financials,analytics-purchasing,analytics-sales,approvals-webui,approvals-webui-
translations,collaboration-webui,dde-installer,erp-base-webui,erp-base-webui-
translations,erp-costing-webui,erp-engineering-webui,erp-engineering-webui-
translations,erp-financials-webui,erp-financials-webui-translations,erp-inventory-
webui,erp-inventory-webui-translations,erp-logistics-webui,erp-logistics-webui-
translations,erp-purchasing-webui,erp-purchasing-webui-translations,erp-requisition-
webui,erp-requisition-webui-translations,erp-sales-webui,erp-sales-webui-
translations,netui-module-installer,opendj-dsml,qad-webshell,qracore-webui,qra-module-
installer,yam-installer
```

- 5 Install TAM image.

```
yab install zip file
```

where *zip file* is the name of the file you received from QAD. For example:

```
yab install tam23-image-2.3.0.0.zip
```

6 Check whether the following packages are installed.

- tam-app 2.3.0.15
- tam 2.3.0.36
- tam-api 2.3.0.36
- tam-ui 2.3.0.10
- tam-translation 2.3.0.0
- qracore-netui 2.20.0.5

7 Run the Analysis Codes Conversion program.

```
<environment  
root>/build/catalog/packages/tam/2/3/0/36/qad.tam/etc/conv/convert_analysiscodes.p
```

Upgrading TAM 2.1 to TAM 2.3

This section guides you in upgrading TAM 2.1 to TAM 2.3 in a QAD 2016 EE environment.

Prerequisites for Upgrade

Here are the preparation tasks to be done before starting the upgrading process.

- Back up all the data in the current system.
- If there is any customized code, ensure that the customized code is compiled.
- Configure Python settings.
- Install YAB 1.7.0.127.
- Install patches for QAD 2016 EE.
- Install QAD Enterprise Financials 2017.1.

Configuring Python

Before installing TAM, ensure that the required Python version is installed. If you have not installed Python, go to the official website of Python to download the installer and install it.

To check the installed Python version, run:

```
> /usr/bin/python -v
```

The existing shell scripts are backed up into the `scripts/backup` directory.

Configure Python settings to locate a compatible Python runtime. To configure the `python.executor` setting, run:

```
vi build/config/configuration.properties
python.executor=/usr/bin/python
```

Installing YAB Update

If you have installed QAD Enterprise Applications, the YAB Client is installed into the `build/client` directory, and a shell script named `yab` is created in the installation directory to run the client. You do not need to take any steps to install the YAB client.

Before you install TAM onto QAD EA, ensure that the YAB client on your system is version 1.7.0.127. If the installed YAB client is older than the required version, follow these steps to install an update to YAB:

- 1 Download the YAB package `yab-ee-image-1.7.0.127.zip` from the QAD Store.
- 2 Move the file to a file system that is accessible from the UNIX host where your Enterprise Edition environment is installed.
- 3 Enter:

```
yab install yab-ee-image-1.7.0.127.zip
```

Installing QAD 2016 EE Patches

Ensure that QAD Enterprise Applications 2016 EE and the required patches are installed before installing TAM.

The patches are:

Patches	Version
mfg-ee2016-patch	2016.0.16.542
netui	3.2.0.62
netui-module-32-cumulative	3.2.95.0 or later

To check the installed version, run:

```
yab info | grep -e netui -e patch
```

You will see a response similar to the following:

```
coli24: EE2016 $ yab info | grep -e netui -e patch
mfg-ee2016-patch                2016.0.16.542    remote
netui                           3.2.0.62         remote
netui-module-32-cumulative      3.2.95.0         remote
```

If the patches are not installed, install them following the instructions in [QAD Enterprise Edition Installation Guide](#).

Installing QAD Enterprise Financials 2017.1

QAD Enterprise Financials 2017.1 is required for using TAM 2.3. See [QAD Enterprise Financials 2017.1 EE, 2016 EE Backward Compatibility Installation Guide](#) for instructions on how to install QAD Enterprise Financials 2017.1 EE on QAD 2016 EE.

Installing TAM Image

- 1 Get the TAM 2.3 installation package from the QAD Store or from QAD Release Fulfillment.
- 2 Modify `configuration.properties` to set the value of environment namespace and default App.

```
vi build/config/configuration.properties
```

```
qra.config.environment.environmentnamespace=com.extensions
```

```
qra.config.environment.defaultappname=QadExtensions
```

Note These values are just examples; the actual values will be different for each customer.

- 3 Modify `configuration.properties` to exclude the packages that are not required.

```
vi build/config/configuration.properties
```

```
dependency.excludes=analytics-core-webui,analytics-core-webui-translations,analytics-
financials,analytics-purchasing,analytics-sales,approvals-webui,approvals-webui-
translations,collaboration-webui,dde-installer,erp-base-webui,erp-base-webui-
translations,erp-costing-webui,erp-engineering-webui,erp-engineering-webui-
translations,erp-financials-webui,erp-financials-webui-translations,erp-inventory-
webui,erp-inventory-webui-translations,erp-logistics-webui,erp-logistics-webui-
translations,erp-purchasing-webui,erp-purchasing-webui-translations,erp-requisition-
webui,erp-requisition-webui-translations,erp-sales-webui,erp-sales-webui-
```

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translations,netui-module-installer,opendj-dsml,qad-webshell,qracore-webui,gra-module-installer,yam-installer

4 Install TAM image.

```
yab install zip file
```

where *zip file* is the name of the file you received from QAD. For example:

```
yab install tam23-image-2.3.0.0.zip
```

5 Check whether the following packages are installed:

- tam-app 2.3.0.15
- tam 2.3.0.36
- tam-api 2.3.0.36
- tam-ui 2.3.0.10
- tam-translation 2.3.0.0
- qracore-netui 2.20.0.5

Ensure that the following packages are not included:

- packages.qrabridge
- packages.qrabridge-api
- packages.qrabridge-erp
- packages.tambridge-erp
- packages.netui-module-tam

6 Run the DD Earned Discount Conversion program.

```
<environment  
root>/build/catalog/packages/tam/2/3/0/36/qad.tam/etc/conv/convert_earneddiscount.p
```

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.

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