



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 2019/2.5	Updated the installation instructions	
	Added instructions for updating TAM 2.4 to 2.5	page 9
November 2018/2.4	Updated the installation instructions	--
	Added instructions for updating TAM 2.3 to 2.4	page 9
May 2018/2.3	Updated the installation instructions	--
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 can be installed into a QAD Enterprise Edition 2016 or later. 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 \(2016\)](#), [QAD Enterprise Edition Installation Guide \(2017\)](#), or [QAD Enterprise Edition Installation Guide \(2018\)](#) for more information about using YAB.

QAD Enterprise Financials 2017.1 or later is required to work with QAD TAM 2.5. Enterprise Financials can be upgraded independently from Enterprise Edition Core. For example, you can implement an Enterprise Financials 2018 instance on Enterprise Edition 2016. For more information about backward compatibility, see [Backward Compatibility Installation Guide](#).

Prerequisites

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

- Progress OpenEdge 11.7.4 hotfix 12 or later
- Python 2.4 or later
- Java 8 JDK version 1.8.0_191
- ZIP64 format support by the zip program
- QAD Enterprise Edition 2016 or later
- QAD Operational Patch
 - For QAD Enterprise Edition 2016, 2016 EE Operational Patch 6 is mandatory.
 - For QAD Enterprise Edition 2017, 2017 EE Operational Patch 3 is mandatory.
 - For QAD Enterprise Edition 2018, no patch is required.
- QAD Enterprise Financials
 - For QAD Enterprise Financials 2017.1, patch 1 or later
 - For QAD Enterprise Financials 2018, patch 1 or later
 - QAD Enterprise Financials 2019
- QAD .NET UI
 - For QAD .NET UI 3.2, Cumulative Patch 6 is mandatory.
 - For QAD .NET UI 3.3 or 3.4, no patch is required.
- QAD QXtend
 - QAD QXtend 1.8.7 with qxtend-bundled-patch-1.8.7.4 or higher is required.
 - If a version of QAD QXtend higher than 1.8.7 is installed, no patch is required.
- Channel Islands March 2019 is required for systems that have Channel Islands installed.
- QAD Production Orders 3.0 patch 1 is required for systems that have Production Orders installed.

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 2.4 to TAM 2.5* 9**

Explains how to upgrade TAM 2.4 to TAM 2.5 on QAD 2016 EE or above.

Preparation for Installation

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

- 1 Installing JAVA
- 2 Installing Python
- 3 Validating Existing QAD Instance Configuration and Installing YAB
- 4 Installing QAD EE Patches
- 5 Installing QAD Enterprise Financials
- 6 Installing QAD QXtend 1.8.7 or Later
- 7 Configuring QRA Storage Areas (QAD 2016 EE Only)

Note After downloading any tool or patch package from the QAD Store, move the downloaded file to a file system that is accessible from the UNIX host where your Enterprise Edition environment is installed.

Installing JAVA

Before installing TAM, make sure that the required JAVA version (jdk 1.8.0_191) is installed. If the current JAVA version is earlier than jdk 1.8.0_191, download jdk 1.8.0_191 and install it.

See Oracle documentation for details about how to install JAVA.

Installing Python

Before installing TAM, make sure that the required Python version (2.4 or later) 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:

```
python -version
```

Validating Existing QAD Instance Configuration and Installing YAB

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, make sure that the YAB for Enterprise Edition (`yab-ee-app`) package installed on your system is version 1.9. If the installed YAB is older than the required version, follow these steps to install an update to YAB:

- 1 Run the following commands to determine the YAB configured username and password:

```
yab config user  
yab config password
```

Note You can log in to the existing QAD Enterprise Edition installation using the .NET UI or CHUI client to confirm that the configuration above is valid.

- 2 Run certain YAB commands to make sure that all existing patches and customizations are compiled successfully. For example:

```
yab code-mfg-customizations-update
yab code-mfg-update
```

- 3 Download the YAB package `yab-ee-image-1.9.0.xxx.zip` from the QAD Store and run the following command:

```
yab install <path to media download>/yab-ee-image-1.9.0.XXX.zip
```

Note If you have installed the YAB client script outside of your environment, this does not automatically update and must be updated before proceeding. See YAB 1.9 Release Notes for details on this operation.

Installing QAD EE Patches

Make sure that the required QAD Enterprise Applications and the required patches are installed before installing TAM.

The patches are:

EE Version	Operational Patch	.NET UI
2018 EE	N/A	N/A
2017 EE	mfg-patch-2017.0.17.710	N/A
2016 EE	mfg-ee2016-patch-2016.0.16.683	netui-module-32-cumulative-3.2.95.0

To check the installed version, run:

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

If the patches are not installed, install them following the instructions in [QAD Enterprise Edition Installation Guide \(2016\)](#), [QAD Enterprise Edition Installation Guide \(2017\)](#), or [QAD Enterprise Edition Installation Guide \(2018\)](#).

If an Operational Patch is required but not installed, install it now:

```
yab -install-update:false install <path to media download>/<mfg-patch>.zip
```

If a .NET UI 3.2 cumulative patch is required but not installed, install it now:

```
yab -install-update:false install <path to media download>/netui-module-32-cumulative-3.2.95.0.zip
```

Installing QAD Financials

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

QAD Financials 2017.1 or later is required for using TAM 2.5.

- If you are using QAD Financials 2017.1, make sure that its latest patch is installed:

```
yab -install-update:false install <path to media download>/qad-ee-fin-patch-2017.1.x.0.zip
```

- If you are using QAD Financials 2018, make sure that its latest patch is installed:

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```
yab -install-update:false install <path to media download>/qad-ee-fin-patch-2018.0.1.x.zip
```

Installing QAD QXtend 1.8.7 or Later

QAD QXtend version 1.8.7 or later is required for using TAM 2.5.

- Make sure that its latest patch is installed:

```
yab -install-update:false install qxtend-bundled-1.8.7.11
yab -install-update:false install qxtend-bundled-patch-1.8.7.4
```

If a version of QAD Qxtend higher than 1.8.7 is installed, no patch is required.

Configuring QRA Storage Areas (QAD 2016 EE Only)

Note If you are installing TAM 2.5 on QAD 2017 EE or later, skip this procedure.

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

- 1 Identify the existing structure file:

```
yab config db.qaddb.structurefile
```

- 2 Modify the file to make sure that the following new areas are added:

```
d "QRA":16,64;8 ./ f 512
d "QRA":16,64;8 ./
#
d "QRA_IDX":17,1;8 ./ f 512
d "QRA_IDX":17,1;8 ./
#
d "QRA_LOB":18,1;8 ./ f 512
d "QRA_LOB":18,1;8 ./
```

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

- 3 Review the storage area numbers and make sure that each number is unique within the structure file.
- 4 Review the extents defined to make sure that they have the required size.

Installing TAM

Perform the following steps to install TAM:

- 1 Get the TAM 2.5 installation package from the QAD Store or from QAD Release Fulfillment.
- 2 Install TAM image.

```
yab -install-update:false install <path to media download>/tam-image-2.5.x.x.zip
```

The TAM installer then starts and guides you through the TAM installation.

- a Press Enter to confirm that you want to begin the installation process.

This installer will guide you through the process of installing TAM App.

The installation is being recorded in the file:

```
/tmp/install.mfg.log
```

At the prompt the ENTER key submits a response and moves to the next question.

'!' will enter command mode to navigate through the questions.

Hit ENTER to continue

```
>
```

b Enter the location of the Progress OpenEdge installation.

```
[Progress OpenEdge]
```

Enter the location of Progress OpenEdge:

```
>/tech/progress/dlc1174_012
```

Note The current value from the environment is populated but can be updated if required.

c Enter the location of the Java JDK installation.

```
[Java]
```

Enter the location of Java:

```
> /tech/java/jdk1.8.0_191
```

Note The current value from the environment is populated but can be updated if required.

d Enter the location of the Python installation.

```
[Python]
```

Enter the location of the Python interpreter:

```
> /usr/bin/python
```

Note The current value from the environment is populated but can be updated if required.

e Enter the namespace of the environment into which you are installing.

Note This namespace controls the set of Apps that can be maintained in the environment. Use the same namespace when installing into multiple environments (for example Dev, Test, and Production).

```
[Environment Namespace]
```

Enter the namespace to associate with this environment:

The namespace identifies the organization using "Reverse Domain Notation" and is used to control which Apps can be maintained using this environment.

Ex. com.[ORGANIZATION]

```
>
```

f Enter the default App to be created.

```
[Default App]
```

Enter the default app:

Configures the app that will be used by default when platform extensions are developed.

Ex. [ORGANIZATION]App

```
>
```

g Select whether to proceed with the installation or not.

```
[Start Installation]
```

Start installing TAM App?

```
n - No
```

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```
y - Yes  
>
```

If you continue, the TAM App packages will be added into the environment and configured.

If you do not continue at this point, no changes are made to the environment.

- 3 Review the current configuration using `yab config` to check if the configuration needs to be adjusted. You can also apply any configuration changes in the `configuration.properties` file.
- 4 When Production Orders 3.0 is installed in the environment, perform the following operations to manually install the integration files:
 - a Create a new folder titled **tamprodorders** within `patches/mfg` folder.
 - b Copy one of the following directories, depending on your EE version and whether Channel Islands (CI) is installed, from the TAM `etc/shared_files` directory to the `patches/mfg` directory:
 - 3-0-with-tam2-4-ee2016
 - 3-0-with-tam2-4-ee2016-ci
 - 3-0-with-tam2-4-ee2017
 - 3-0-with-tam2-4-ee2017-ci
 - 3-0-with-tam2-4-ee2018
 - 3-0-with-tam2-4-ee2018-ci
 - c Copy `ppptmta.p` from the `etc/shared_files/prodorder/us/pp` folder to the corresponding sub-folder (`.../us/pp/`) of the above directory within `patches/mfg/tamprodorders`.
- 5 Use the follow steps to avoid creation of extension database.

Note This step is required for non-Channel Islands customers only.

```
vi build/config/configuration.properties  
db._extension.enabled = false
```

- 6 Run the following command to apply the update:

```
yab update
```

Note The update installs TAM as well as any additional updates included in the configuration. You can monitor the status of the update in `build/logs/yab.log`.

- 7 Run `yab info -all` to check whether the following packages are installed:
 - YAB version: 1.9
 - tam-app 2.5.x.x
 - tam 2.5.x.x
 - tam-api 2.5.x.x
 - tam-ui 2.5.x.x
 - tam-translation 2.5.x.x

- qracore-netui 2.20.0.8

8 Run the Analysis Codes Conversion program.

```
<environment
root>/build/catalog/packages/tam/2/5/0/x/qad.tam/etc/conv/convert_analysiscodes.p
```

To verify that TAM is installed successfully, you can check if the following functions under Trade Activity Management work properly:

- TAM Control
- Deal Profile Maintenance|Create
- Promotion Maintenance|Create

Upgrading TAM 2.4 to TAM 2.5

This section guides you in upgrading TAM 2.4 to TAM 2.5 in a QAD 2016 EE or later 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, make sure that the customized code is compiled.
- Make sure Progress OpenEdge, minimum version OE 11.7.4 hotfix 12 is installed.
- Make sure that Java (jdk 1.8.0_191) is installed.
- Make sure that Python 2.4 or later is installed.
- Validate the existing QAD instance configuration and install YAB 1.8.
- Install patches for QAD 2016 EE or QAD 2017 EE. If running QAD 2018 EE, no patch is required.
- Install QAD Financials 2017.1 or later.

Note After downloading any tool or patch package from the QAD Store, move the downloaded file to a file system that is accessible from the UNIX host where your Enterprise Edition environment is installed.

Installing JAVA

Before installing TAM, make sure that the required Java version (jdk 1.8.0_191) is installed. If the current Java version is earlier than jdk 1.8.0_191, download jdk 1.8.0_191 and install it.

See Oracle documentation for details about how to install Java.

Installing Python

Before installing TAM, make sure that the required Python version (2.4 or later) 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:

```
python -version
```

Validating Existing QAD Instance Configuration and Installing YAB

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 EE, make sure that the YAB client on your system is version 1.9. If the installed YAB client is older than the required version, follow these steps to install an update to YAB:

- 1 Run the following commands to determine the YAB configured username and password:

```
yab config user
yab config password
```

Note You can log in to the existing QAD Enterprise Edition installation using the .NET UI or CHUI client to confirm the above configuration is valid.

- 2 Run certain YAB commands to make sure that all existing patches and customizations are compiled successfully. For example:

```
yab code-mfg-customizations-update
yab code-mfg-update
```

- 3 Download the YAB package `yab-ee-image-1.9.0.xxx.zip` from the QAD Store and run the following command:

```
yab install <path to media download>/yab-ee-image-1.9.0.XXX.zip
```

Note If you have installed the YAB client script outside of your environment, this does not automatically update and must be updated before proceeding. See YAB 1.9 Release Notes for details on this operation.

Installing QAD EE Patches

Make sure that QAD Enterprise Applications 2016 EE or later and the required patches are installed before installing TAM.

The following table outlines the minimum operational patch or .NET UI version that must be installed for TAM for each EE version:

EE Version	Operational Patch	.NET UI
2018 EE	N/A	N/A
2017 EE	mfg-patch-2017.0.17.710	N/A
2016 EE	mfg-ee2016-patch-2016.0.16.683	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: 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 an Operational Patch is required but not installed, install it now:

```
yab -install-update:false install <path to media download>/<mfg-patch>.zip
```

If a .NET UI 3.2 cumulative patch is required but not installed, install it now:

```
yab -install-update:false install <path to media download>/netui-module-32-cumulative-3.2.95.0.zip
```

Installing QAD QXtend 1.8.7 or Later

QAD QXtend version 1.8.7 or later is required for using TAM 2.5.

- Make sure that its latest patch is installed:

```

yab -install-update:false install qxtend-bundled-1.8.7.11
yab -install-update:false install qxtend-bundled-patch-1.8.7.4

```

If a version of QAD QXtend higher than 1.8.7 is installed, no patch is required.

Installing QAD Financials 2017.1 or Later

QAD Financials 2017.1 or later is required for using TAM 2.5.

- If you are using QAD Financials 2017.1, make sure that its latest patch is installed:

```
yab -install-update:false install <path to media download>/qad-ee-fin-patch-2017.1.x.0.zip
```

- If you are using QAD Financials 2018, make sure that its latest patch is installed:

```
yab -install-update:false install <path to media download>/qad-ee-fin-patch-2018.0.1.x.zip
```

Installing TAM Image

- 1 Get the TAM 2.5 installation package from the QAD Store or from QAD Release Fulfillment.
- 2 Install TAM image.

```
yab -install-update:false install <path to media download>/tam-image-2.5.x.x.zip
```

The TAM installer then starts and guides you through the TAM installation.

- a Press Enter to confirm that you want to begin the installation process.

This installer will guide you through the process of installing TAM App.

The installation is being recorded in the file:

```
/tmp/install.mfg.log
```

At the prompt the ENTER key submits a response and moves to the next question.

'!' will enter command mode to navigate through the questions.

```
Hit ENTER to continue
```

```
>
```

- b Enter the location of the Progress OpenEdge installation.

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```
[Progress OpenEdge]
```

Enter the location of Progress OpenEdge:

```
> /tech/progress/dlc1174_012
```

Note The current value from the environment is populated but can be updated if required.

c Enter the location of the Java JDK installation.

```
[Java]
```

Enter the location of Java:

```
> /tech/java/jdk1.8.0_191
```

Note The current value from the environment is populated but can be updated if required.

d Enter the location of the Python installation.

```
[Python]
```

Enter the location of the Python interpreter:

```
> /usr/bin/python
```

Note The current value from the environment is populated but can be updated if required.

e Enter the namespace of the environment into which you are installing.

Note This namespace controls the set of Apps that can be maintained in the environment. Use the same namespace when installing into multiple environments (for example Dev, Test, and Production).

```
[Environment Namespace]
```

Enter the namespace to associate with this environment:

The namespace identifies the organization using "Reverse Domain Notation" and is used to control which Apps can be maintained using this environment.

Ex. com.[ORGANIZATION]

```
>
```

f Enter the default App to be created.

```
[Default App]
```

Enter the default app:

Configures the app that will be used by default when platform extensions are developed.

Ex. [ORGANIZATION]App

```
>
```

g Select whether to proceed with the installation or not.

```
[Start Installation]
```

Start installing TAM App?

n - No

y - Yes

```
>
```

If you continue, the TAM App packages will be added into the environment and configured.

If you do not continue at this point, no changes are made to the environment.

- 3** Review the current configuration using `yab config` to check if the configuration needs to be adjusted. You can also apply any configuration changes in the `configuration.properties` file.

- 4 When Production Orders 3.0 Patch 1 is installed in the environment, perform the following operations to manually install the integration files:

Note If you are already using TAM 2.4 along with Production Orders 3.0, then just rename that folder to "tamprodorders" and the following steps are not required.

- a Create a new folder titled **tamprodorders** within patches/mfg folder.
 - b Copy one of the following directories, depending on your EE version and whether Channel Islands (CI) is installed, from the TAM `etc/shared_files` directory to the `patches/mfg` directory:
 - 3-0-with-tam2-4-ee2016
 - 3-0-with-tam2-4-ee2016-ci
 - 3-0-with-tam2-4-ee2017
 - 3-0-with-tam2-4-ee2017-ci
 - 3-0-with-tam2-4-ee2018
 - 3-0-with-tam2-4-ee2018-ci
 - c Copy `ppptmta.p` from the `etc/shared_files/prodorder/us/pp` folder to the corresponding sub-folder (`.../us/pp/`) of the above directory within `patches/mfg/tamprodorders`.
- 5 Use the follow steps to avoid creation of extension database.
- Note** This step is required for non-Channel Islands customers only.

```
vi build/config/configuration.properties
db._extension.enabled = false
```

- 6 Run the following command to apply the update:

```
yab update
```

Note The update installs TAM as well as any additional updates included in the configuration. You can monitor the status of the update in `build/logs/yab.log`.

- 7 Run `yab info -all` to check whether the following packages are installed:

- YAB version: 1.9
- tam-app 2.5.x.x
- tam 2.5.x.x
- tam-api 2.5.x.x
- tam-ui 2.5.x.x
- tam-translation 2.5.x.x
- qracore-netui 2.20.0.8

- 8 Run Accrual Conversion program.

Note This step is only required if you are upgrading from a patched version of TAM 2.4 (TAM 2.4.1.x or higher).

Run the Accrual Conversion program from the following location:

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```
<environmentroot>/build/catalog/packages/tam/2/5/x/x/qad.tam/etc/conv/convert_accrual_2425.p
```

To verify that TAM is installed successfully, you can check if the following functions under Trade Activity Management work properly:

- TAM Control
- Deal Profile Maintenance|Create
- Promotion Maintenance|Create

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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