



QAD Adaptive Applications

# **Technical Reference Promotions and Environment Manager**

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# Promotions and Environment Manager Technical Reference Change Summary

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

| Date/Version      | Description                                                                                                   | Reference | Changed By |
|-------------------|---------------------------------------------------------------------------------------------------------------|-----------|------------|
| MAY 2020/v2020    | Initial upload                                                                                                | --        | NQC        |
| AUG 2020/v2020.1  | Version update; added information about full copies.                                                          | 7         | RQT        |
| MAR 2021/v2021    | Updated versioning                                                                                            | --        | NQC        |
| SEPT 2021/v2021.1 | Updated versioning;<br>Added details about exporting navigation menu                                          | p. 13     | FFV        |
| MAR 2022/v2022    | Updated versioning                                                                                            | --        | FFV        |
| SEPT 2022/v2022.1 | Updated versioning                                                                                            | --        | FFV        |
| MAR 2023/v2023    | Updated versioning                                                                                            | --        | FFV        |
| MAR 2024/v2024    | Updated versioning                                                                                            | --        | FFV        |
| SEPT 2024/v2024.1 | Updated versioning                                                                                            | --        | FFV        |
| MAR 2025/v2025    | Updated versioning                                                                                            | --        | FFV        |
| SEPT 2025/v2025.1 | Updated versioning                                                                                            | --        | FFV        |
| SEPT 2026         | Updated versioning<br>Added information on exporting and importing gadgets and dashboards across environments | p. 25     | F6J        |

## Chapter 1

# Introduction

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## Overview

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

### About This Guide

This user guide focuses on:

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

## Prerequisites for Environment Manager

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

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

### Hardware and Software Requirements

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

## Capabilities of Environment Manager

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

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

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

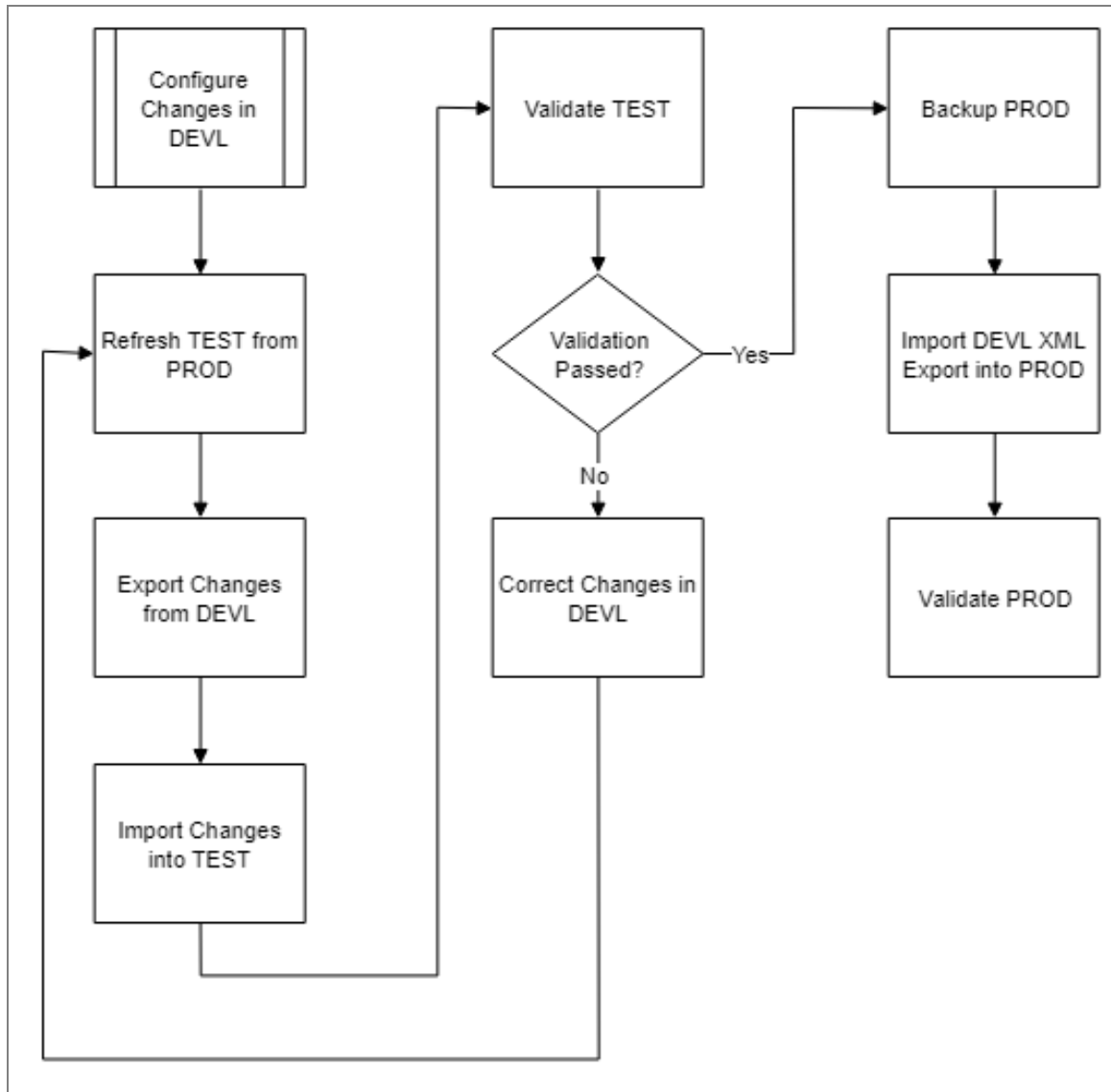
## Limitations of Environment Manager

Please note the limitations of Environment Manager, listed below:

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

## Process Flow

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



## Configure Changes in DEVL

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

Examples of changes include the following:

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

## Refresh TEST from PROD

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

## **Export Changes from DEVL**

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

## **Import Changes into TEST**

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

## **Verify TEST**

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

## **Correct Changes in DEVL**

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

## **Verify TEST**

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

## **Backup PROD**

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

## **Import DEVL Export into PROD**

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

## **Verify PROD**

The verification process within PROD occurs at this stage.

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

## Chapter 2

# Using the Environment Manager

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## Sign In

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

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

**Fig. 1: Admin Tools Login page**

The screenshot shows a web application window titled "Cebos Environment Manager v2019 LoginViewModelBase". The main heading is "Admin Tools Login". Below the heading, a message reads: "Please enter the Destination URL and credentials for the sites you wish to work with." The form includes a "2019 Site URL" label above a text input field containing "https://www.qad.com/AdminTools". Below this are two input fields for "Username" (containing "Username") and "Password" (containing "Password"). A "CONNECT" button is centered below the username and password fields. In the bottom right corner, there is a "NEXT" button. The version "Version: 0.0.0.0" is displayed in the bottom left corner of the application frame.

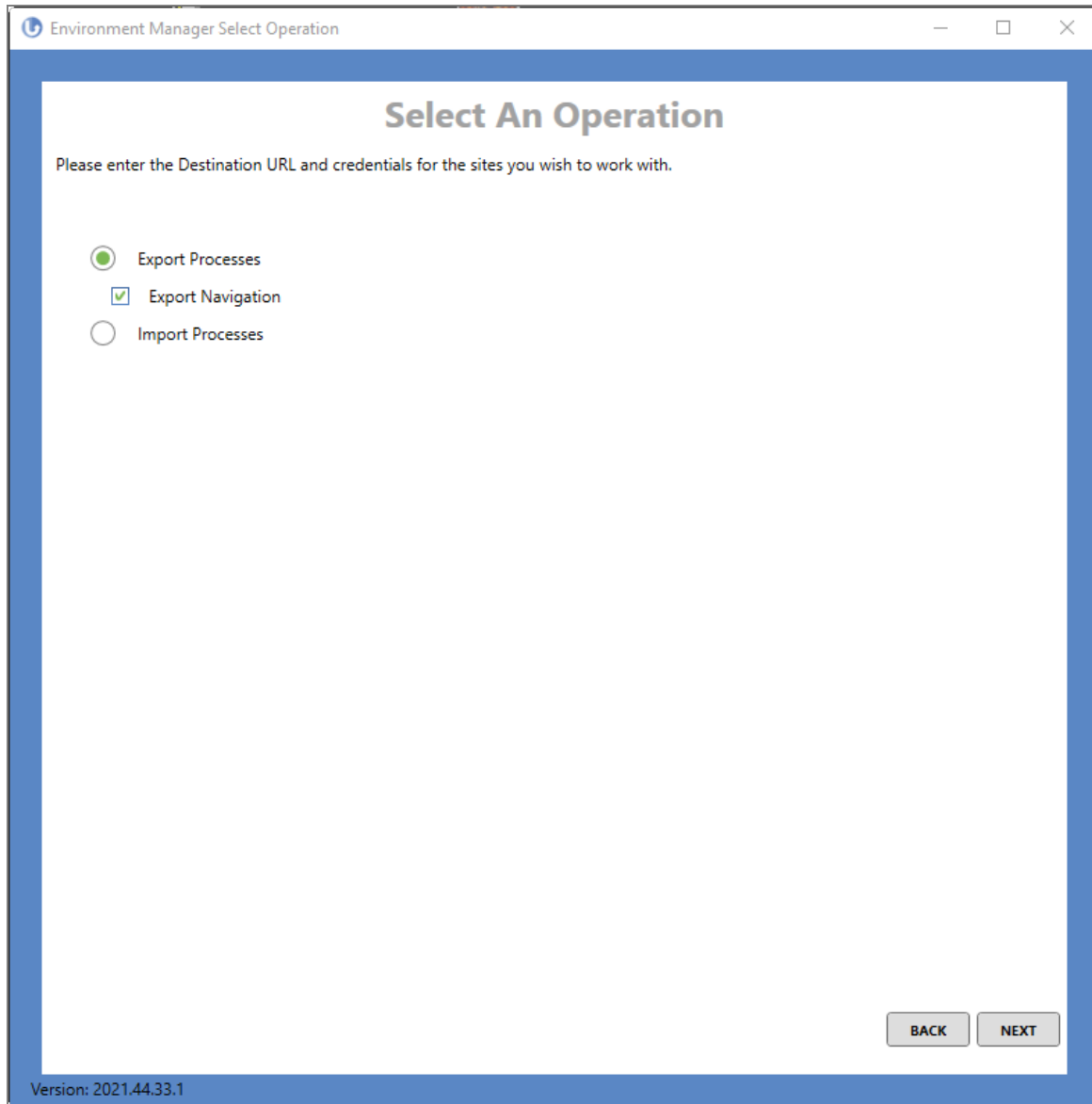
After entering the applicable path and admin credentials, click the Connect button. When you have successfully signed in, click the Next button. Note that this button is greyed out until the connection is successful.

## Main Page and Options

In the Main Page, select one of two options:

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

**Fig. 2: Select an Operation screen**



## Download Processes

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

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

Fig. 3: Select Processes screen

Cebos Environment Manager v2019 Select Processes

## Select Processes

Select the processes you wish to export.

Select: **ALL** **NONE**

Filter **SEARCH** **X**

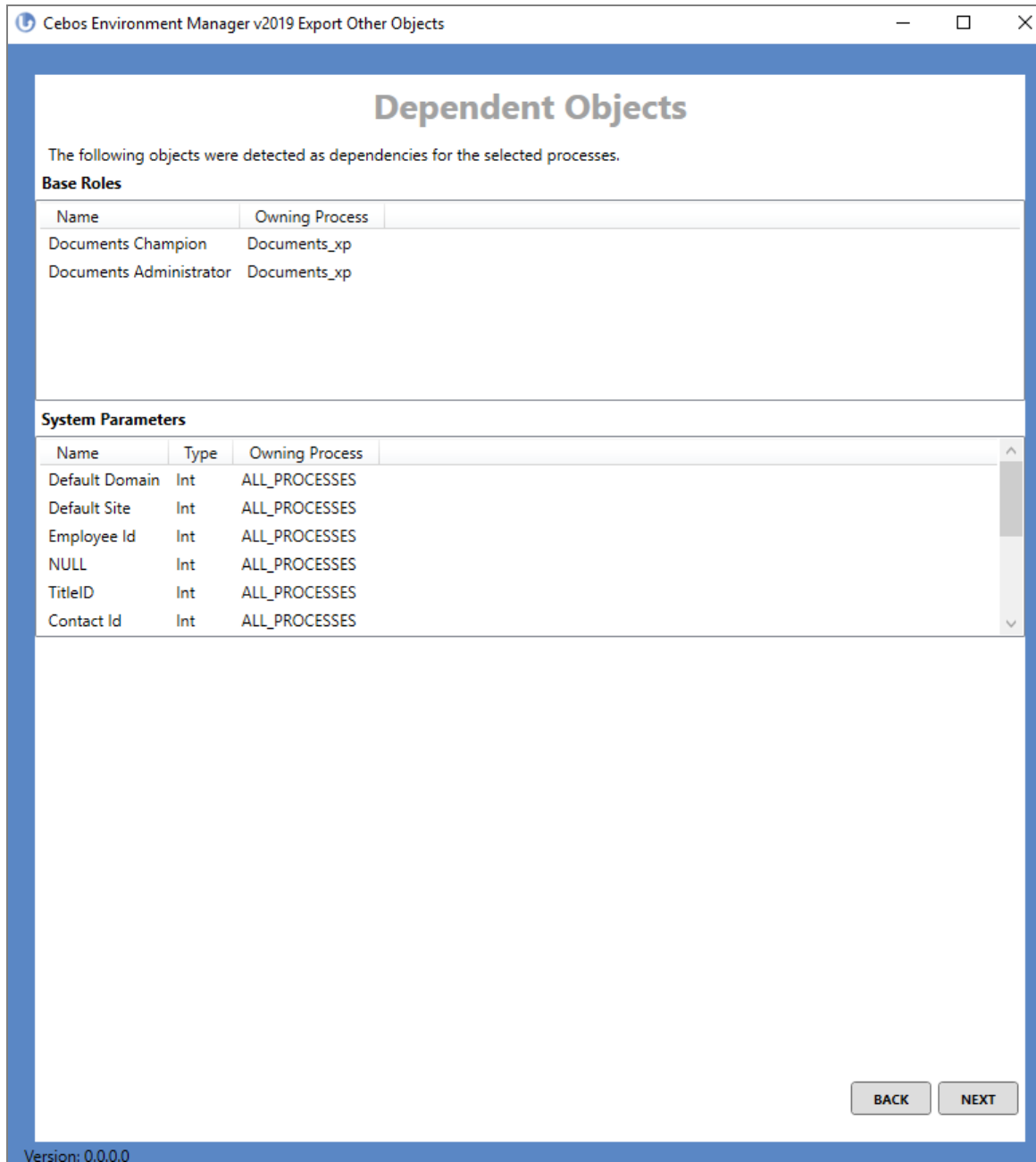
| Selected                 | Process          |
|--------------------------|------------------|
| <input type="checkbox"/> | Documents        |
| <input type="checkbox"/> | Non-conformances |
| <input type="checkbox"/> | EM2019           |
| <input type="checkbox"/> | Items            |
| <input type="checkbox"/> | QXtend Configs   |
| <input type="checkbox"/> | Processes        |

**BACK** **NEXT**

Version: 0.0.0.0

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

Fig. 4: Dependent Objects screen



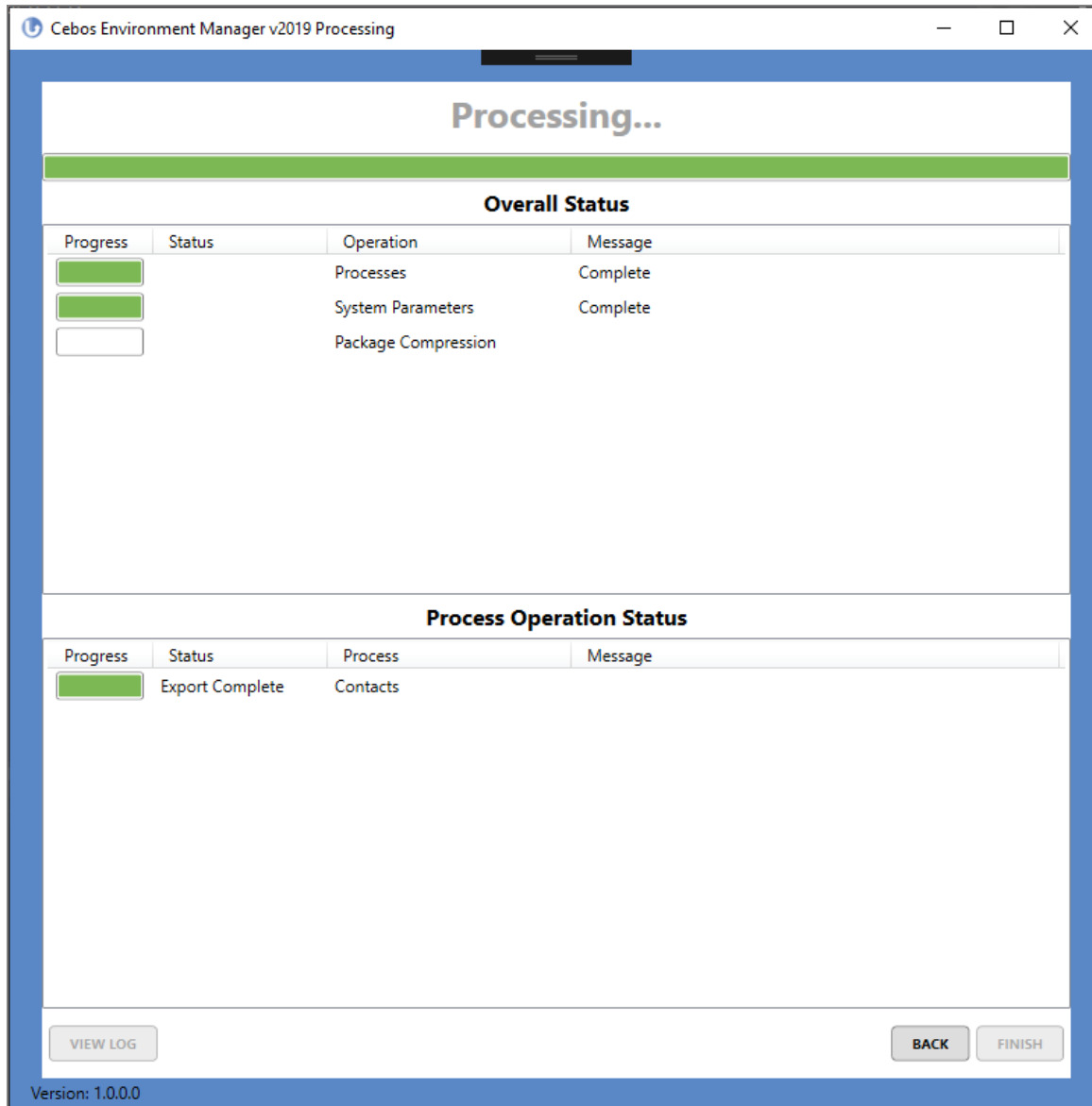
Select a location to save the .zip file. Then click Next.

**Fig. 5: Select File or Folder screen**

The screenshot shows a web application window titled "Cebos Environment Manager v2019 Select File". The main heading is "Select File or Folder". Below this, the instruction "Select the directory to export the files" is displayed. A text input field labeled "Full Path to File or Directory" is present, followed by a "BROWSE" button. At the bottom right, there are "BACK" and "NEXT" buttons. The version "Version: 0.0.0.0" is shown in the bottom left corner of the application area.

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

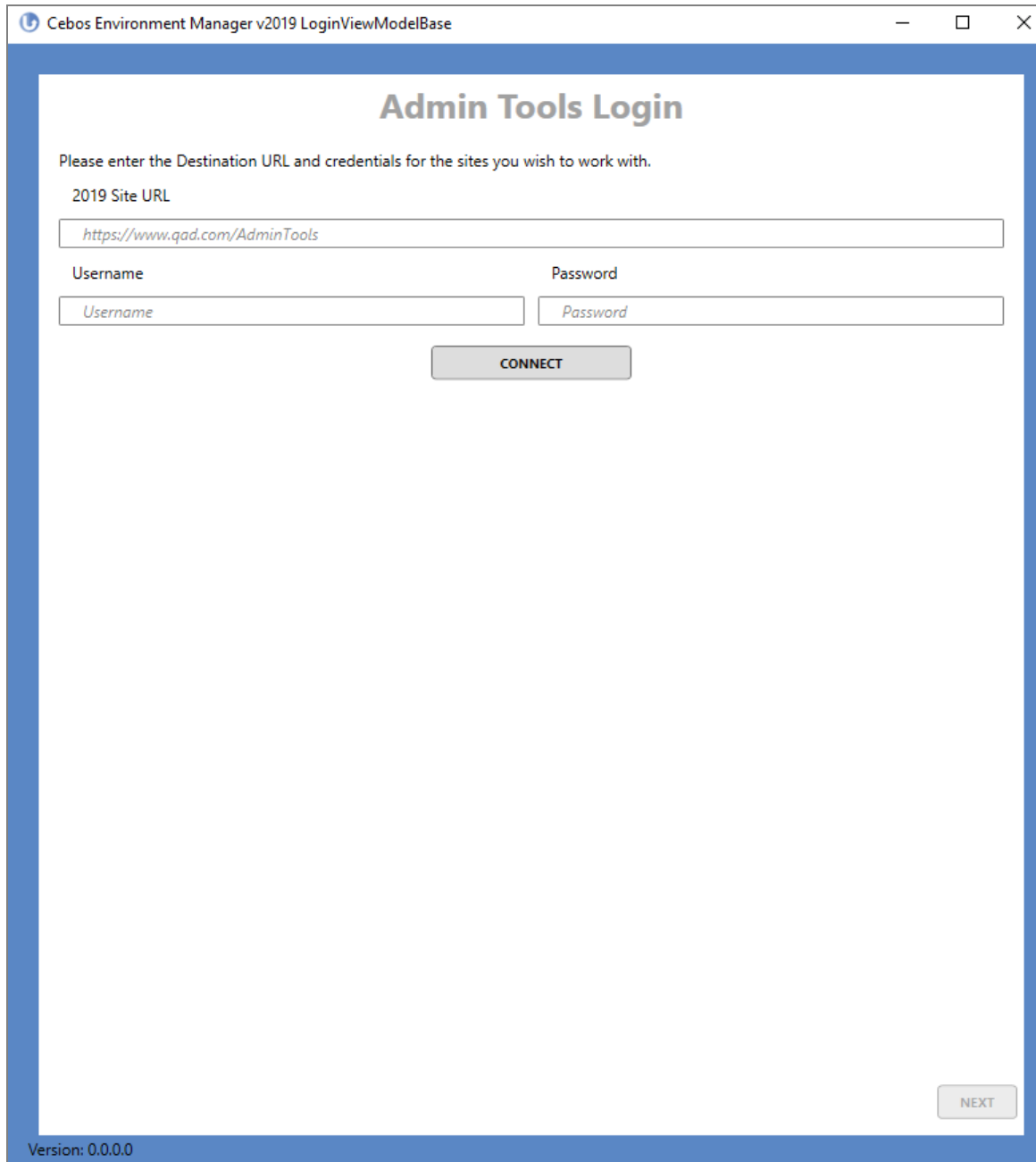
Fig. 6: Overall Status screen



## Upload Processes

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

Fig. 7: Admin Tools Login screen



The image shows a web application window titled "Cebos Environment Manager v2019 LoginViewModelBase". The main heading is "Admin Tools Login". Below the heading, there is a prompt: "Please enter the Destination URL and credentials for the sites you wish to work with." The form includes a "2019 Site URL" field with the value "https://www.qad.com/AdminTools". Below this are two fields: "Username" with the placeholder "Username" and "Password" with the placeholder "Password". A "CONNECT" button is centered below these fields. In the bottom right corner, there is a "NEXT" button. The version "Version: 0.0.0.0" is displayed in the bottom left corner.

Cebos Environment Manager v2019 LoginViewModelBase

## Admin Tools Login

Please enter the Destination URL and credentials for the sites you wish to work with.

2019 Site URL

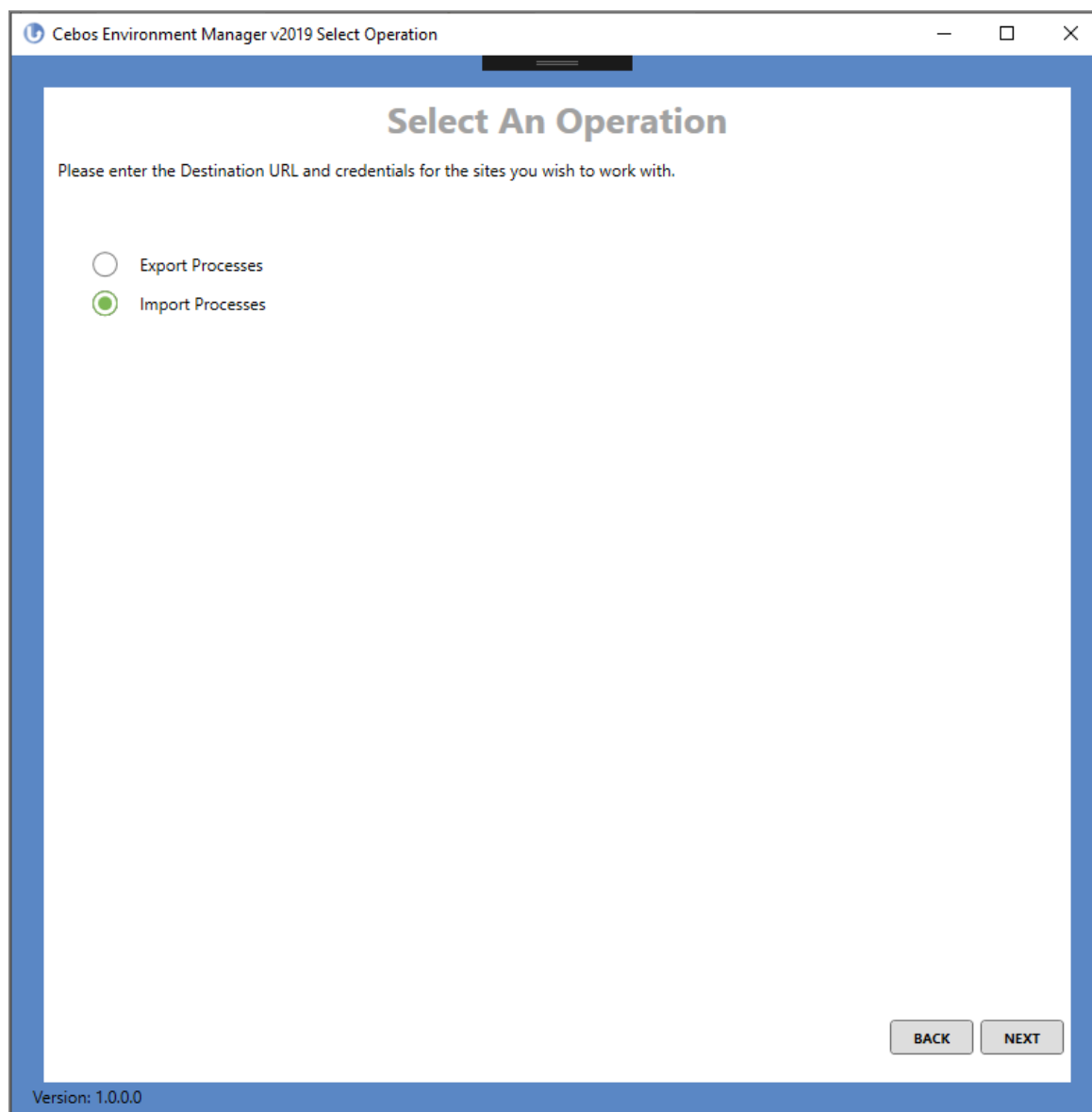
Username

Password

Version: 0.0.0.0

Select Import Processes, then click Next.

**Fig. 8: Select An Operation screen**



Select the exported .zip file, then click Next.

**Fig. 9: Select File or Folder screen**

Cebos Environment Manager v2019 Select File

## Select File or Folder

Select the ZIP file containing the processes

Full Path to File or Directory

C:\Users\ffv\Desktop\ExportedProcesses.zip

BROWSE

BACK NEXT

Version: 1.0.0.0

Select the extended processes you wish to import.

Fig. 10: Select Processes screen

Cebos Environment Manager v2019 Select Processes

## Select Processes

Select the processes you wish to import.

Select: **ALL** **NONE**  **SEARCH** **X**

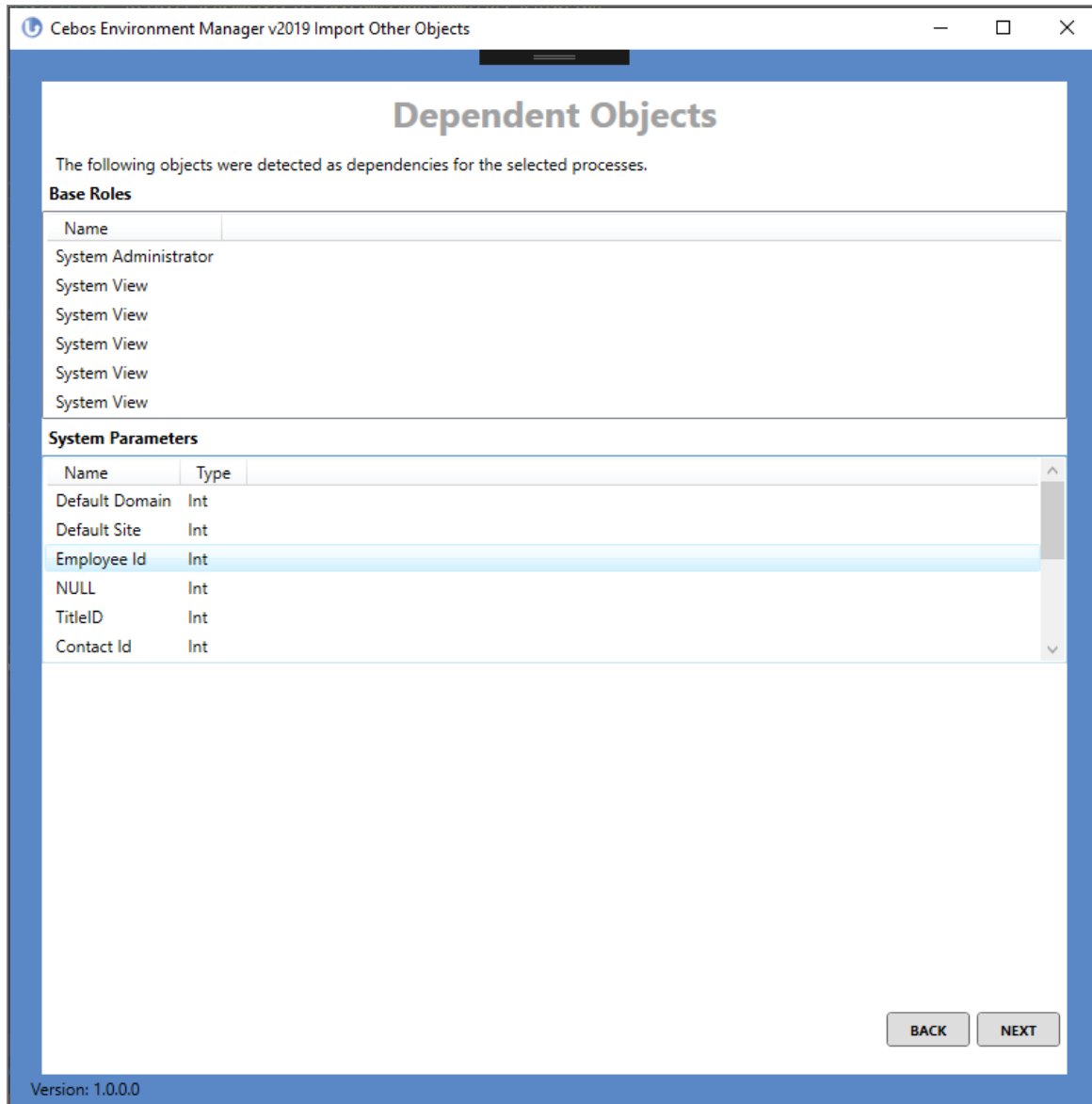
| Selected                            | Name                                |
|-------------------------------------|-------------------------------------|
| <input checked="" type="checkbox"/> | Los Contacts                        |
| <input checked="" type="checkbox"/> | ReleaseTestProcess                  |
| <input checked="" type="checkbox"/> | Employees                           |
| <input checked="" type="checkbox"/> | Items                               |
| <input checked="" type="checkbox"/> | Non-conformances                    |
| <input checked="" type="checkbox"/> | RFQs                                |
| <input checked="" type="checkbox"/> | Processes                           |
| <input checked="" type="checkbox"/> | Los Documentos                      |
| <input checked="" type="checkbox"/> | Manufacturing Documents             |
| <input checked="" type="checkbox"/> | Manufacturing Document Process Flow |
| <input checked="" type="checkbox"/> | Domains                             |
| <input checked="" type="checkbox"/> | Sites                               |
| <input checked="" type="checkbox"/> | Deviations                          |
| <input checked="" type="checkbox"/> | Gauge Calibrations                  |

**BACK** **NEXT**

Version: 1.0.0.0

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

Fig. 11: Dependent Objects screen



You can click View Log when the process is finished.

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

Fig. 12: Overall Status screen

The screenshot shows a window titled "Cebos Environment Manager v2019 Processing". The main content area is titled "Processing..." and contains two sections: "Overall Status" and "Process Operation Status".

**Overall Status**

| Progress             | Status | Operation                   | Message       |
|----------------------|--------|-----------------------------|---------------|
| <input type="text"/> |        | Extending Processes         | New Extension |
| <input type="text"/> |        | Importing Processes Stage 1 |               |
| <input type="text"/> |        | Importing Processes Stage 2 |               |
| <input type="text"/> |        | Importing Processes Stage 3 |               |
| <input type="text"/> |        | Security Roles              |               |
| <input type="text"/> |        | System Parameters           |               |
| <input type="text"/> |        | Publish and Deploy          |               |

**Process Operation Status**

| Progress             | Status       | Process                 | Message |
|----------------------|--------------|-------------------------|---------|
| <input type="text"/> | Extending... | Los Contacts            |         |
| <input type="text"/> |              | ReleaseTestProcess      |         |
| <input type="text"/> |              | Employees               |         |
| <input type="text"/> |              | Items                   |         |
| <input type="text"/> |              | Non-conformances        |         |
| <input type="text"/> |              | RFQs                    |         |
| <input type="text"/> |              | Processes               |         |
| <input type="text"/> |              | Los Documentos          |         |
| <input type="text"/> |              | Manufacturing Documents |         |

At the bottom of the window, there is a "VIEW LOG" button on the left and "BACK" and "FINISH" buttons on the right. The version number "Version: 1.0.0.0" is displayed at the bottom left.

## Chapter 3

# Exporting / Importing Dashboards and Gadgets Across Environments

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## Exporting / Importing Dashboards and Gadgets Across Environments

Environment Manager allows you to include admin dashboards and gadgets when exporting and importing processes between environments. The process works by exporting a zip package from the source environment and importing that same zip package into the destination environment.

When enabled, all dashboards and gadgets from the source environment are packaged and merged into the destination.

### Prerequisites

Before you begin, it is essential that the following prerequisites are met:

- Environment Manager 2026.0 or later is installed on the client.
- Source and destination connections are configured to access the Elements Meta database.
- A zip package produced by Environment Manager (for import).

## Export Dashboards and Gadgets

The export step packages your processes, dashboards, and gadgets from the source environment into a zip file. You will use this zip file in the import step.

1. Sign in to Environment Manager and connect to the source site.
2. On Select An Operation, select Export Processes.
3. Select the Export Gadgets checkbox next to Export Navigation.
4. Select Next and choose the processes to export.
5. Continue through Dependent Objects. Dashboards and gadgets are collected in the background and do not appear in the list.
6. Choose your destination zip file and run the export.

The package contains `AdminDashboards.json` and `AdminGadgets.json` at the zip root if non-removed dashboards or gadgets exist on the source. If the checkbox is cleared, or if no qualifying objects exist, those files are omitted.

## Import Dashboards and Gadgets

The import step takes the zip file produced during export, and merges its contents into the destination environment.

1. Sign in to Environment Manager and connect to the destination site.
2. On Select An Operation, select Import Processes.
3. Select the export zip and continue. Environment Manager automatically detects `AdminDashboards.json` and `AdminGadgets.json` files at the zip root and enables dashboard and gadget import.
4. Continue through the wizard and run the import.

Dashboards and gadgets are merged into the destination Meta database by matching on GUID. Matching records are updated; new GUIDs are inserted. Import runs only after the process import succeeds. If process import fails, dashboards and gadgets are not imported.

## Troubleshooting

If you encounter issues during export or import, use the following table that describes common situations and their resolutions.

| Situation                                                                          | Resolution                                                                                                                                                          |
|------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dashboards and gadgets are missing after import                                    | Make sure that the zip contains the JSON files at the zip root, that process import succeeded, and that you are connected to the correct destination Meta database. |
| Package was exported with an older client that stored gadget files in a sub folder | The JSON files will not be detected. Re-run the export using a client that writes them to the zip root.                                                             |
| Calendar working-exception error with an invalid table name                        | Re-run the import using a client that includes the calendar cleanup query fix (v2026.0 or later).                                                                   |