



QAD Adaptive Applications

# Install Guide

# QAD Production Orders

Introduction  
Production Orders Installation

70-3386-3.2.1  
Production Orders 3.2.1  
QAD Enterprise Edition 2016 and Later  
January 2021

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ProductionOrders\_IG\_v0321.pdf

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# Production Orders Install Guide 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
January 2021 Production Orders 3.2.1	Updated for version 3.2.1.	--
	Removed manual installation steps.	page 6
September 2020 Production Orders 3.2	Updated software and environment requirements for version 3.2.	page 2
	Updated information about the pre-installation tasks and the installation procedure.	page 6
March 2020 Production Orders 3.1	Revision 2 of installation guide.	--
	Updated software and environment requirements for version 3.1.	page 2
	Updated the steps for installing Production Orders and the Workbenches using YAB.	page 7
	Updated the description for running the Progress program to re-create tables.	page 8
	Added installation verification for Adaptive UX.	page 12
October 2019 Production Orders 3.1	Revision 1 of installation guide.	page 7
September 2019 Production Orders 3.1	Updated software and environment requirements for version 3.1.	page 2
	Added Production Orders upgrade impact upon Data Collection.	page 4
	Updated data conversion details.	page 9
	Added verification upon Data Collection.	page 12
January 2019 Production Orders 3.0	Revision 4 of installation guide.	--
	Added process map version for 2016/2017 EE.	page 2

Date/Version	Description	Reference
November 2018 Production Orders 3.0	Revision 3 of installation guide.	--
	Updated content location information.	page 4
	Removed reference to content package.	page 10
October 2018 Production Orders 3.0	Revision 2 of installation guide.	--
	Revised E-Signature installation.	page 8
October 2018 Production Orders 3.0	Revision 1 of installation guide.	--
	Clarified YAB version required and removed EAM requirement.	page 2
	Added text for SAQ 2.7.1 installation not required for 2018 EE.	page 2 page 6
	Removed ordered steps for Production Orders and Channel Islands—San Miguel 2 installation and added additional text to clarify steps needed when installing both products.	page 2 page 6
	Added additional text for On-Premise Channel Islands installations with Production Orders.	page 2 page 6
	Clarified text for users who need to re-create tables.	page 6 page 8
October 2018 Production Orders Version 3.0	Rebranded for version 3.0; added support for 2016 through 2018	--
	Removed hotfix information required for earlier (2.0) version of Production Orders	page 2
	Added text for <code>configuration.properties</code> file based on EE versions.	page 7
	Removed steps to install SAQ and process maps and added SAQ installation as a pre-installation step.	page 6
	Added information to requirements and to pre-installation procedures for Channel Islands.	page 2 page 6
	Added a procedure to resolve conflicting tables when you upgrade production orders then install Channel Islands.	page 8
	Added version 3.0 new fields/programs to check for verification.	page 10
	Removed appendix list of Production Order files and provided a path to view the files.	page 4
May 2018 Production Orders Version 2.0	Added information about installing a hotfix package for Production Orders 2.0	--
	Added information about installing process maps	--
	Added information for a hotfix package to install with Serialization, Item Attributes, and Quality Control (SAQ) 2.7.1.	--

Date/Version	Description	Reference
March 2018 Production Orders Version 2.0	Rebranded for version 2.0.	--
	Added new package content.	page 18
	Updated prerequisites for this package.	page 2
	Removed QDoc installation procedures.	page 6
	Added Automation Solutions: Data Collection transaction installation information.	page 8
	Added E-Signature installation information.	page 8
	Updated conversion information.	page 9
	Updated customizations to include TAM information.	page 10
	Updated verification with new program screens.	page 10
Updated description for Customizations to include both customizations and patches.	page 10	
October 2017, Production Orders Version 1.2	Rebranded for version 1.2; updated version of the QAD Planning and Scheduling Workbenches. Added new package content	--
July 2017, Production Orders Version 1.1.1	Rebranded for version 1.1.1, changing file names and package content for version 1.1.1	--
July 2017, Production Orders Version 1.1.	Rebranded for version 1.1	--
	All file names were changed to reflect the correct versions for version 1.1	--
	Some QDoc installation procedures were removed; the single procedure remaining now reflects standard QDocs	--
Contents in Appendix were updated to reflect version 1.1 contents	--	
April 2017, Production Orders Version 1.0.0. Early Adopter	This is the first version of this guide.	--



# Introduction

This chapter discusses Production Orders installation topics.

**Important** Production Order functionality replaces and obsoletes functions and programs in QAD ERP. Once you install Production Orders, you cannot uninstall and return the replaced/obsoleted functions and programs. For a list of functions/programs that were replaced, removed, or moved, refer to the Introduction chapter of the *QAD Production Orders User Guide*, version 3.2.

**Production Orders Installation 2**

Describes system and software prerequisites you must meet before installing Production Orders and the package contents.

**Production Orders Requirements 2**

Describes the software and environment and other requirements for Production Orders installation.

**Production Orders Installation Package 4**

Lists the production orders package contents.

**Patches and Customized Programs 4**

Introduction to handling customizations.

# Production Orders Installation

This section discusses Production Orders installation requirements, the installation package, and pre-installation preparations.

## Production Orders Requirements

The following sections describe the software and environment and other requirements for Production Orders installation.

### Software and Environment

You must have the following software and environment to install Production Orders software:

- 2016, 2017, 2018, 2019, or 2020 Enterprise Edition (EE)
- Process map of the latest version
- YAB: YAB 1.9 is the minimum version required for on-premise users.
- OpenEdge 11.7.5 hotfix 004 is required if you use OpenEdge 11.7.5.
- QAD Planning and Scheduling Workbenches is included within the On-Premise Production Order package.

**Note** The Planning and Scheduling Workbenches package installs when you install the Production Order package; see “Production Orders Installation Procedure” on page 6.

- Serialization, Item Attributes, and Quality Control (SAQ) 2.7.1: required only for 2016 and 2017 EE

Refer to your SAQ 2.7.1 installation documentation.

- QAD E-Signature

**Note** You must also install E-Signature seed data for use with Production Orders 3.2. Refer to “Installing E-Signature Data” on page 8.

- Data Collections

To use the Data Collection transactions that optionally install with Production Orders, you must have a minimum version 3.1 or higher of the Automation Solutions: Data Collections framework installed.

**Note** To ensure better functionality and user experience, it is recommended that you install the latest Automation Solutions, which is now Automation Solutions: Data Collection 3.2.

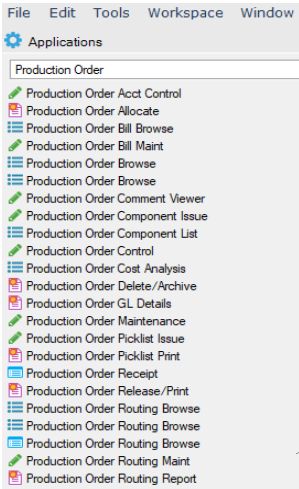
- Adaptive UX

Adaptive UX is optional for Production Orders 3.2.

When you install Adaptive UX with Production Orders 3.2, note the following:

- Adaptive UX 2020.1 Release is the minimum version requirement.
- If you install Production Orders 3.2 on a system that already uses Adaptive UX, you must re-install Adaptive UX to include *productionorder-webui-app*. For details about how to install Adaptive UX, see *QAD Adaptive ERP On-Premise Installation Guide* in QAD Document Library. Then verify that you can use Production Orders functions (for example, Production Order BOMs, Production Order Routings, and so on) in both .NET UI and Adaptive UX environments.





Production Orders functions in Adaptive UX

Production Orders functions in .NET UI

- Production Orders
- Production Order BOMs
- Production Order Routings
- Repetitive Cumulative Orders
- Operation Transactions
- Picklist Shortages
- Production Picklist History
- Production Picklists
- Bulk Item Picklist Print
- Multiple Production Order Status Change
- Production Order Picklist Print
- Production Order Status
- Production Picklist Shortage Update
- Recalculate Capacity Plan
- Work Center Dispatch



# Production Orders Installation Package

QAD provides the following Production Orders installation components:

- Installation configuration settings
- Production Orders package
- E-Signature seed data; see “Installing E-Signature Data” on page 8.
- QAD Planning and Scheduling Workbenches; see “Production Orders Installation Procedure” on page 6.
- Optionally installed software in the package:
  - QAD Automation Solutions: Data Collection transactions; see “Installing Data Collection Transactions for Production Orders” on page 8.

After the install command has been run, you can check package contents by finding version-specific sub-directories in the following directory:

```
${appdir}/build/catalog/packages/productionorder/
```

## Patches and Customized Programs

The installation package contains modifications to the existing QAD ERP programs; therefore, if you have applied QAD patches or customizations, it is your responsibility to review, and when needed, merge the QAD patch changes, customizations, and any other changes after applying the installation package. QAD does not support customized programs.

## Production Orders and QAD Automation Solutions: Data Collection Transactions

If you have Data Collection installed and are currently using the Data Collection transactions, please be aware that installing the new version of Production Orders may affect how the transactions function. If you are upgrading Production Orders, Data Collection transactions may need to be upgraded as well.

After installing Production Orders, it is required as part of the Installation Verification process to test the Data Collection transactions and verify that they function properly. See “Checking Data Collection Transactions” on page 14.



# Production Orders Installation

This chapter describes QAD Production Orders package installation and post-installation configuration.

## ***Production Orders Pre-Installation Tasks*** 6

Describes steps to perform before the actual installation.

## ***Production Orders Installation Procedure*** 6

Provides step-by-step instructions for installing both Production Orders and the QAD Planning and Scheduling Workbenches using YAB.

## ***Installing Data Collection Transactions for Production Orders*** 8

Tells you how to re-create tables when you upgrade to Production Orders 3.0 or later from an earlier version.

## ***Installing Data Collection Transactions for Production Orders*** 8

Provides instructions for when you install Automation Solutions: Data Collection transactions with Production Orders.

## ***Installing E-Signature Data*** 8

Provides instructions for when you install QAD E-Signature seed data for use with Production Orders 3.2.

## ***Conversion*** 9

Provides step-by-step instructions to run a conversion program to ready database records for use with the new Production Orders functionality.

## ***Patches and Customized Programs*** 10

Tells you what to do with customized programs when installing the Production Orders package.

## ***Installation Verification*** 10

Provides methods to verify successful installation in the EE and Adaptive UX environments.

## Overview

The following sections describe how to install the Production Orders package and how to configure the product after installation. You install Production Orders using YAB.

**Important** Production Orders functionality replaces and obsoletes functions and programs in QAD ERP. Once you install Production Orders, you cannot uninstall and return the replaced/obsoleted functions and programs. For a list of functions/programs that were replaced, removed, or moved, refer to the Introduction chapter of the *QAD Production Orders User Guide*, version 3.2.

**Note** When you upgrade to Production Orders 3.0 or later from an earlier version, you must run a Progress program to resolve table content conflicts. See “Installing Data Collection Transactions for Production Orders” on page 8.

## Production Orders Pre-Installation Tasks

### Installing Serialization, Item Attributes, and Quality Control (SAQ)

You should install SAQ 2.7.1 for the 2016 EE and 2017 EE environments that run with Production Orders 3.2 before you install Production Orders. You do not need to install SAQ 2.7.1 for a 2018, 2019, or 2020 EE environment. Refer to your SAQ 2.7.1 installation documentation for instructions.

### Checking YAB Configuration for Cloud Users

Make sure `dependency.strictscope` is set to `true`.

### Backing Up Databases

Perform these steps before the actual YAB installation:

- 1 Choose one of the following:
  - a Back up your databases and supporting environments. To back up all databases, execute the command:

```
yab database-backup
```

- b Back up a specific database by executing the command:

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

**Note** Be sure to include the compile database (`cpldb.db`) in your backup.

## Production Orders Installation Procedure

The following section describes the installation. Downloading the installation package depends upon your environment:

- On-Premise servers: You download the package(s) first.



- Cloud: The installation process retrieves the package from the Cloud Catalog. No extraction is necessary.

## Downloading the Installation Package (On-Premise Servers)

The Production Orders package contains all applicable components for Production Orders, including packages for YAB.

To download the Production Orders installation package, download the add-on .zip file from the QAD Store.

## Installing Production Orders and the Workbenches Using YAB

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. Refer to *QAD Enterprise Edition Installation Guide* for more information about using YAB.

When you run YAB, the process installs Production Orders and the Production Orders-compliant versions of the QAD Planning and Scheduling Workbenches packages.

**Note** Before installing Production Orders, you need to check whether *netui-module-mswpsw-ee-ga* has been installed. If *netui-module-mswpsw-ee-ga* has been installed, a compilation error will occur when you install Production Orders 3.1, EE 2020, or later. Therefore you need to exclude *netui-module-mswpsw-ee-ga* from the package by referring to the following KnowledgeBase article: <https://knowledgebase.qad.com/kmp/article/AB-25787>.

Follow these steps to install Production Orders using YAB:

**Note** When running commands in the following steps, fill in the latest version in the package or version number fields.

- 1 Change to the directory where EE is installed:
 

```
cd <directory>
```
- 2 Choose one of the following:
  - a If you are a Cloud user, go on to step 3 on page 7.
  - b If you are an On-Premise user, go on to step 4 on page 8.
- 3 For Cloud, update the `configuration.properties` file and the `process-ignore` file:
  - a Locate the `configuration.properties` file in the `build/config` directory.
  - b Open the `configuration.properties` file and create a reference to the Production Orders Package.

For all EE versions, you add the following packages for both Production Orders and the Workbenches (MSW/PSW):

For example, add the following information to the file:

```
--Production Orders--#
packages.productionorder-app=3.2.0.x
```

## 8 QAD Production Orders Installation Guide

- 4 For On-Premise, first download the zip package from the QAD site. Then update the environment with the following command:

```
yab install /dr01/installs/productionorder-encrypted-image-3.2.0.x.zip -install-update:false
```

- 5 Update the environment with the following command: `yab update`

## Installing Data Collection Transactions for Production Orders

You can optionally install the QAD Automation Solutions: Data Collection menus and transactions for Production Orders. Only customers that use the Data Collections module should install the transactions and menus.

Use the following Data Collections programs to load the transactions and menus:

- Transaction Definition Import/Export (6.23.4)
- Process Category Import/Export (6.23.1)

Use the following steps to import the Data Collections transaction and menus:

- 1 Run Transaction Definition Import/Export to import the new data collections transactions. The transactions are located at:

```
${appdir}/dist/as-setup/transactions/productionorder/
```

- 2 Run Process Category Import/Export to import the new data collections menus. The menus are located at:

```
${appdir}/dist/as-setup/menus/productionorder/
```

For further details on importing data, see *QAD Automated Solutions: Data Collection Installation Guide*.

## Installing E-Signature Data

You must install QAD E-Signature seed data for use with Production Orders 3.2. Seed data is mandatory data that must be loaded for a program—in this case, Production Orders 3.2—to work properly.

To load data:

- 1 Run E-Sig Initial Data Load (36.12.14.13).
- 2 When prompted, enter the following directory:

```
{appdir}/config/electronic-signature/productionorder/
```

This generates the field data details.



To use the newly loaded E-Signature data:

- 1 Run E-Signature Workbench Refresh (36.12.14.4) to bring the new seed data into the Workbench Profile.
- 2 Run E-Signature Workbench Profile Maint (36.12.14.5) to choose your desired E-Sig settings for that category.
- 3 Run E-Signature Profile Activation (36.12.14.8) to activate your new seed data. You can only enter tomorrow as the earliest date to start using this new profile.

## Conversion

In environments with YAB 1.8.0.145 or above, the data conversion process is dynamically executed by YAB as a part of an upgrade. The conversion is executed only once in each upgrade. If you want to perform conversion again, run the following command:

```
yab system-process-enable conv-progress-productionorder-qaddb-postdata-convprdord
```

In environments where the YAB version is earlier than 1.8, follow the procedure below.

The conversion program prepares database records for use with the new functionality.

Perform the following steps to run the conversion program:

- 1 Start a single-user mode OpenEdge client session for the mfgdb database.
- 2 Start the conversion program by executing the following command:  

```
run us/ut/utprdord.r
```

 The conversion screen displays.
- 3 Set the Run Production Order Conversions field to Yes and start the conversion process.  
 The Report Name field generates a report file name automatically. The system places the file in `build/work/client` where EE is installed. The report file shows statistics by domain of the record types that the system processed in the conversion.

Sample output from the conversion is as follows:

```
Domain:10USA,Table:lad_det,Count:0,Processed:0,Deleted:0
Domain:10USA,Table:mrp_det,Count:0,Processed:0,Deleted:0
Domain:10USA,Table:op_hist,Count:13488,Processed:1316,Deleted:0
Domain:10USA,Table:pt_mstr,Count:350,Processed:21,Deleted:0
Domain:10USA,Table:ptp_det,Count:24,Processed:0,Deleted:0
Domain:10USA,Table:rps_mstr,Count:110,Processed:110,Deleted:110
Domain:10USA,Table:wo_mstr,Count:5017,Processed:5017,Deleted:0
Domain:11CAN,Table:lad_det,Count:0,Processed:0,Deleted:0
Domain:11CAN,Table:mrp_det,Count:0,Processed:0,Deleted:0
Domain:11CAN,Table:op_hist,Count:12557,Processed:125,Deleted:0
```

## Patches and Customized Programs

The installation package contains modifications to the existing QAD ERP programs; therefore, if you have applied QAD patches or customizations, it is your responsibility to review, and when needed, merge the QAD patch changes, customizations, and any other changes after applying the installation package. QAD does not support customized programs.

### Trade Activity Management (TAM)

When TAM is installed in the environment, you must also install the Production Orders TAM integration files.

**Note** Production Orders 3.2 only supports TAM 2.6 and above. If you use old TAM versions, Production Orders 3.2 installation could fail.

## Installation Verification

### Verification for .NET UI

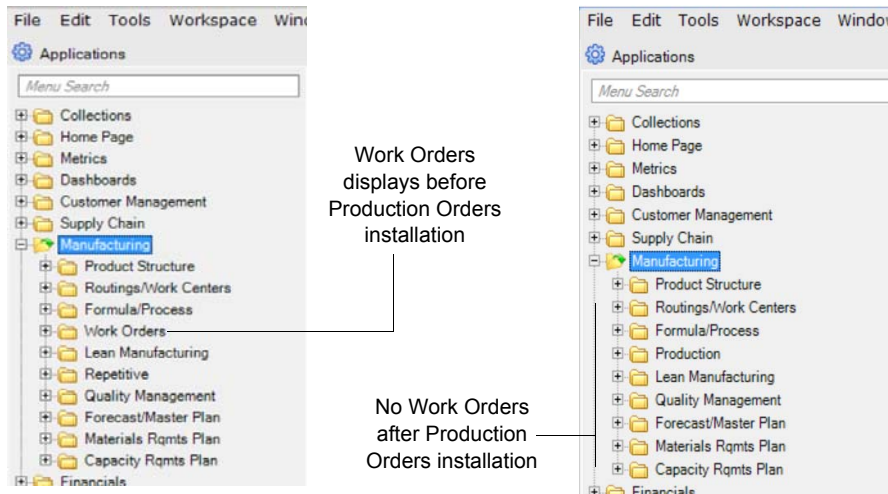
In the EE environment, you can verify that Production Orders and the Planning and Scheduling Workbenches have been successfully installed.

#### **Note**

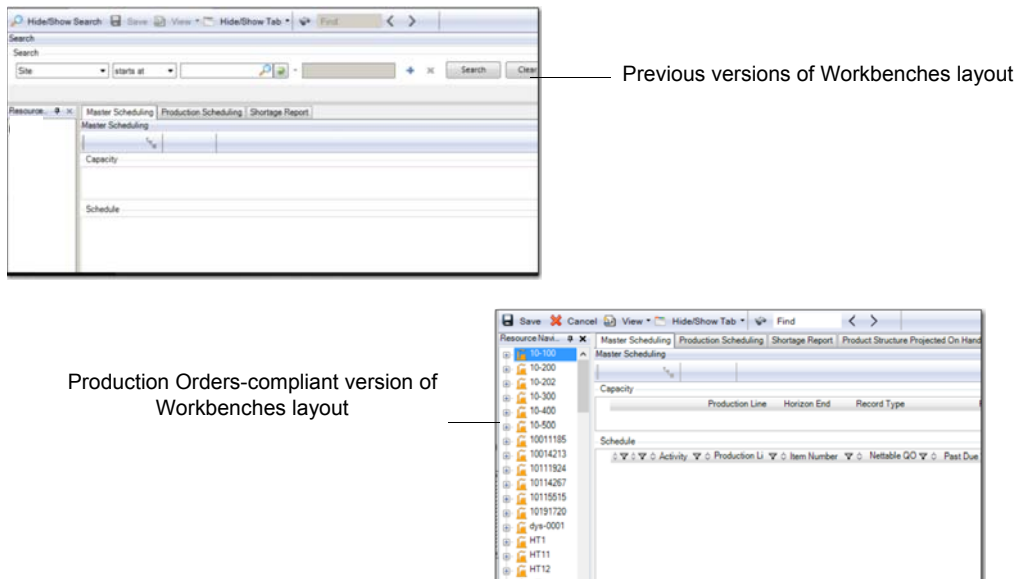
When loading stored views from EE-version Planning and Scheduling Workbenches to the Production Orders-compliant Workbenches, the Production Orders-compliant Workbenches may encounter errors and then go down. So, after installing Production Orders 3.2, which includes the Production Orders-compliant Workbenches, you are advised to re-create the stored views to ensure that they can be opened on the Workbenches properly.

Validation logic has been added to the Production Orders-compliant Workbenches to check whether the stored views are for an EE-version Workbenches. If so, an error message is displayed, asking you to re-create such views.

- 1 In your EE environment, verify that the Manufacturing menu now has *Production* in the list and both *Work Orders* and *Repetitive* removed.



- 2 Check the layout of the Production Orders-compliant version of the Planning and Scheduling Workbenches. It is different from previous versions of the product.



- 3 Verify that the new Production Shop Floor Collection exists.

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The screenshot displays the QAD Enterprise Applications interface. The main window title is "test: 10USA USA Division [USD] > 10USACO USA DIVISION (2) - QAD Enterprise Applications". The application is running in a "Production Shop Floor Collect..." process. The search criteria are: Site equals, Work Center equals, and Order Status equals R. The main table shows a list of production orders with columns for ID, Parent Item, Sequen, Order Status, Component Status, Location Availability, Quantity Open, Release Date, Destination, Production Line, Work Center, Op. Sales/Job, and Due Date. Below this, a "Production Order Component List" window is open, showing a detailed view of components for order 091402. The component list includes:

ID	Component Item	Gross Req	PQOH	Component Status	Location Availability	Item Description	Qty Required	Quantity Picked	Quantity Issued	Allocation Policy	Issue Policy	Pick Policy
091402	crz-a-001	10.0	36.0	Available	Backflush	component item 001	10.0	0.0	0.0	Detail	Detail	Issue
091402	crz-a-002	10.0	-166.0	Shortage	Not Enough Inventory	component item 002	10.0	0.0	0.0	Detail	Backflush	Transfer
091402	crz-a-003	10.0	-177.0	Shortage	Not Enough Inventory	component item 003	10.0	0.0	0.0	Detail	Backflush	Transfer

- 4 In your EE environment, start the QAD Planning and Scheduling Workbenches, version 4.4 that installed with the 3.2 package. Check for new days on hand (DOH) preferences. In the QAD Planning and Scheduling Workbenches main screen, select Options | Preferences | Data Load.

The screenshot shows the "Settings" window with the "Data Load" tab selected. The "Define The Date Range Content To Display" section contains the following settings:

- History Horizon\*: 0
- Future Horizon\*: 30
- Process Operation Detail
- Include items with no activity\*
- Calculate DOH\*
- Product Structure POH\*: POH

Changes will take effect when the application is restarted.\*

## Verification for Adaptive UX

Adaptive UX is optional for Production Orders 3.2.

When you install Adaptive UX with Production Orders 3.2, note the following:

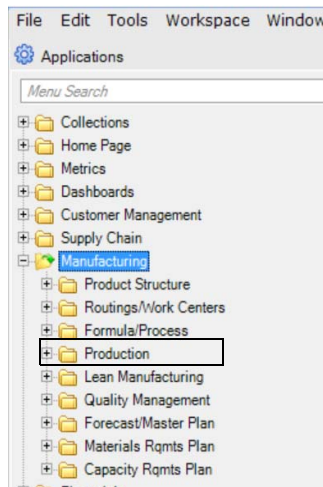
- Adaptive UX 2020.1 Release is the minimum version requirement.



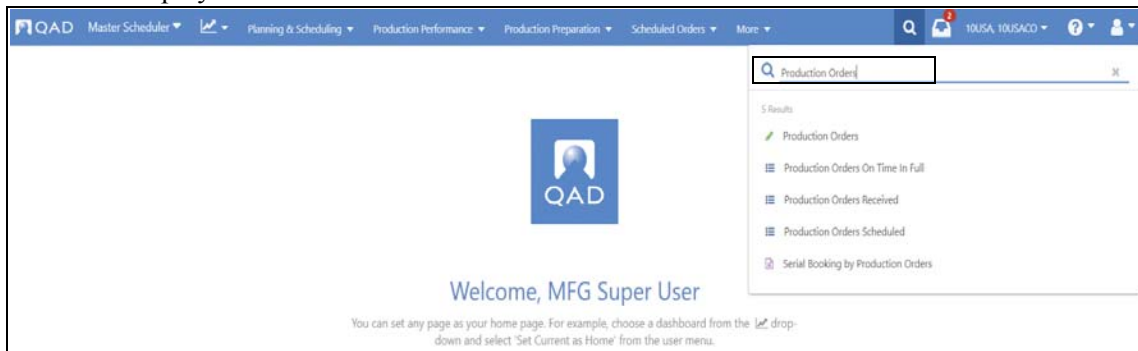
- If you install Production Orders 3.2 on a system that already uses Adaptive UX, you must re-install Adaptive UX to include *productionorder-webui-app*. For details about how to install Adaptive UX, see *QAD Adaptive ERP On-Premise Installation Guide* in QAD Document Library.

Verify that you can use Production Orders functions (for example, Production Orders, Production Order BOMs, and so on) in both .NET UI and Adaptive UX environments.

- 1 In your EE environment, verify that the Manufacturing menu now has *Production* in the list.



- 2 In your Adaptive UX environment, enter Production Orders in the search box, and click the menu displayed below the search box.



- 3 Verify that the Production Orders view exists.

Schedule Indicat...	Production Order #1	ID #2	Site	Production Line	Release Date	Sequence	Shift	Item	Description	UOM	Qty Open
⚠	03020031	2545159	10-200		3/9/2020	0.0		62510	6 Way Switch	EA	1
⚠	03020032	2545160	10-200		3/16/2020	0.0		62510	6 Way Switch	EA	2
⚠	03020033	2545161	10-200		3/23/2020	0.0		62510	6 Way Switch	EA	1
⚠	03020034	2545162	10-200		3/2/2020	0.0		62520	4 Way Switch	EA	2
⚠	03020035	2545163	10-200		3/9/2020	0.0		62520	4 Way Switch	EA	2
⚠	03020036	2545164	10-200		3/16/2020	0.0		62520	4 Way Switch	EA	2
⚠	03020037	2545165	10-200		3/23/2020	0.0		62520	4 Way Switch	EA	2
	03020038	2545171	10-200	1000A2	3/30/2020	0.0		02220	Motor Asm 4-Way S...	EA	2
	03020040	2545173	10-200	1000	3/30/2020	0.0		02010	Motor Asm Connector	EA	4

## Checking Data Collection Transactions

**Note** This section does not apply to users who do not have Data Collection installed and/or are not using the Production Orders Data Collection transactions.

If you have Data Collection installed and were using the Data Collection transactions with your previous version of Production Orders, you must check the Data Collection transactions and verify that they function properly. For details, refer to *QAD Automated Solutions: Data Collection Installation Guide* or *QAD Automated Solutions: Data Collection User Guide*.

# 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)

Visit QAD's one-stop destination for all courses and training materials.

\*Log-in required

