QAD Cloud ERP
Channel Islands 2019 Release Notes

March 2019

These release notes include information about QAD Cloud ERP with Channel Islands 2019 and the QAD Enterprise Platform.

This release is a General Availability (GA) release for QAD Cloud ERP and is an Early Adopter (EA) release for on-premise customers.

Review this document *before* proceeding with any phase of an implementation.

These release notes include the following sections:

Channel Islands – March 2019

Previous Releases

Summary of previous Channel Islands releases:

Installation and Configuration Information

The following summarizes installation and configuration changes for this version of Channel Islands.

The QAD Document Library (https://documentlibrary.qad.com) offers a complete set of all QAD user guides, training guides, and other materials.

Introduction to Channel Islands Program

The Channel Islands program is a technology initiative that transforms the QAD user experience (UX), improving business outcomes through more effective users, processes, and decision-making. The Channel Islands program includes the new QAD Web UI, which provides an intuitive, engaging, and flexible user interface that streamlines tasks while offering clear visual insights into business data. The Channel Islands program also includes the QAD Enterprise Platform, which provides the underlying architecture with a set of agile, rapid response technologies for extending the capabilities of the system. The Channel Islands program components, including the QAD Web UI and Enterprise Platform technologies, work with QAD Enterprise Applications – Enterprise Edition.

Release Summary

This release, Channel Islands 2019 (March 2019), is available as follows:

- General Availability (GA) release for QAD Cloud ERP
- Early Adopter (EA) release for on-premise with QAD Enterprise Applications – Enterprise Edition

For this release, customers are encouraged to work closely with their QAD account manager or partner to learn more about the selection, implementation, and use of new and upgraded capabilities for their specific business requirements.

Versions Required

This section lists the product and technology versions required for Channel Islands 2019.

QAD Cloud ERP and QAD Enterprise Applications Versions

Versions required:

QAD Cloud ERP: Channel Islands 2019 General Availability (GA) for QAD Cloud ERP 2019 requires:

- QAD Enterprise Applications – Enterprise Edition (EE) 2015, 2016, 2017, or 2018

QAD Enterprise Applications (On-Premise): Channel Islands – March 2019 Early Adopter (EA) for QAD Enterprise Applications On-Premise requires:

- QAD Enterprise Applications – Enterprise Edition (EE) 2016, 2017, or 2018 (Linux only)

Enterprise Edition Operation Patches

QAD Enterprise Applications – Enterprise Edition Operation Patches:

- 2015 EE — 2015 EE Cloud Patch 8 mandatory if 2019 QAD Financials is in use; otherwise, can stay on Patch 6
- 2016 EE — 2016 EE Op Patch 6 mandatory if 2019 QAD Financials is in use; otherwise, can stay on Patch 4.
- 2017 EE — 2017 EE Op Patch 3 mandatory if 2019 QAD Financials is in use; otherwise, can stay on Patch 2.

- 2018 EE — Latest 2018 EE Op Patch is recommended but none needed.

QAD Financials Versions

Minimum QAD Financials versions required:

- 2017.1 QAD Financials Patch 1
- 2018 QAD Financials Patch 1
- 2019 QAD Financials

For the new Financials and Fixed Assets features, 2019 QAD Financials is required.

Note QAD Financials was previously known as Enterprise Financials.

QAD Reference Architecture (QRA) Version

The QAD Reference Architecture included with Channel Islands 2019 is QRA 3.5.

Your Application Builder (YAB) Version

- YAB 1.9

QAD Enterprise Platform Version

The QAD Enterprise Platform (version 3.5) is included with this release, accessible directly from the QAD Web UI.

Note QAD Enterprise Platform 3.5 can be made available for customers using Channel Islands – San Miguel 2. Please contact QAD Support for further details.

QAD Web UI Version

The QAD Web UI is the web-based user interface for Channel Islands 2019. The QAD Web UI coexists with the QAD .NET UI and Character UI (CHUI) user interfaces, which are included with QAD Enterprise Applications – Enterprise Edition (EE).

QAD .NET UI Versions

QAD .NET UI versions required:

- QAD .NET UI 3.4 for 2018 EE
- QAD .NET UI 3.3 for 2017 EE
- QAD .NET UI 3.2 Cumulative Patch 6 for 2015 EE and 2016 EE

QXtend Versions

QXtend: the latest QXtend release and patches are recommended:

- QXtend 1.8.7, qxtend-bundled-patch 1.8.7.4 is mandatory; latest release and patches are recommended

Enterprise Asset Management (EAM) Versions

During installation, you have the option to enable EAM Requisitions Integration, which will integrate EAM with the requisitions, purchasing, and asset management capabilities in the QAD Web UI. Using the asset management capabilities in the QAD Web UI can change how you use EAM in the QAD .NET UI. Further, system configuration changes are required for using the asset management capabilities in the QAD Web UI. Be sure to work with QAD regarding the necessary configuration changes for using asset management in the QAD Web UI.

EAM version required:

- EAM 2017.1 (13.3.0.6)

Production Orders Version

For Production Orders, Production Orders 3.0.1 is required and includes MSW/PSW 4.2.2.2.

Production Orders also requires SAQ 2.7.1.

Action Center Mobile App Versions

QAD Action Center Mobile App versions required:

- QAD Action Center Mobile App version 1.4.1 and above (iPhone and Android)

Web Browsers Supported

Browsers supported for use with the QAD Web UI:

- The user interface is only supported on current versions of Chrome and Safari web browsers. Although other web browsers can be used, you may experience differing levels of performance and user experience.
- To make sure you have the latest security updates, browsers such as Chrome and Safari can be updated automatically by Google or Apple.

Tablets Supported

For tablet use, the user interface is only supported on iPad Pro (or newer equivalent) running iOS 11+ with the Safari web browser. Although other tablets can be used, you may experience differing levels of performance and user experience.

Technology Versions

Technology versions include the following:

- Progress OpenEdge Minimum Version: 11.7.4.009; Supported: 11.7.4+
  Hot Fix OpenEdge 11.7.4.012 Mandatory for Performance Gain
- .NET Framework Runtime: 4.5 (Compile 4.0)
- Visual Studio 2017 Professional for framework development; 2010 Professional or greater for plugin development
- Infragistics Winforms Libraries 2012.1
- Tomcat: 7.0.85
- Oracle Java Runtime:1.8.0_191 (Compile: 1.8.0_191)

- Enterprise Edition Browser Support: IE11
- Progress DLLs: Minimum Version: 11.7.4, Supported: 11.7.4+
- Spring Framework: 4.3.18
- Spring Security: 4.2.6 (5.0.4 latest)
- Kendo UI v2018.3.911
- Web UI Browser Support: Chrome 71+, Safari 12+
- MongoDB: 3.0.3
- AngularJS: 1.6.1
- Typescript: 1.8.10
- Apache Web Server: 2.4.27
- Logi Info Server: 12.5+
- Python: 2.7
- Elastic Search: 5.4
- Log Stash 5.4.0.1
- Kibana: 5.4.3.0
- Minimum Server Operating System: CentOS 6.6, RH 6.6
- Cassandra 3.11.1
- Kafka 1.0.1
- Apache Spark 2.2.1
- Mobile Framework: Cordova 8.0.0

Installation Considerations

When installing QAD Enterprise Applications – Enterprise Edition for use with this release Channel Islands, please note the following.

SECCOMP Warning Message

During installation, you might encounter the following message:

```
[WARN ][o.e.b.JNANatives         ] unable to install syscall filter:
java.lang.UnsupportedOperationException: seccomp unavailable: CONFIG_SECCOMP not compiled into
kernel, CONFIG_SECCOMP and CONFIG_SECCOMP_FILTER are needed
```

This warning message can be safely ignored and requires no action during the installation process: there is no impact to the installation or any Elastic Search functionality.

Inbox Links to Reports after Channel Islands Upgrade

If upgrading to this release from the Channel Islands – Santa Rosa 2 release, please note that Inbox notification links to reports that were generated with the Channel Islands – Santa Rosa 2 release will no longer be valid due to a change in the report storage location. If you encounter an error with a previously generated report, please re-run the report.

Online Help Locations by Release

- Channel Islands — March 2019:

    https://documentlibrary.qad.com/help/webui/2019_0/en-US/index.html

- Channel Islands — San Miguel 2:
  https://documentlibrary.qad.com/help/webui/sanmiguel/en-US/index.html
- Channel Islands — San Miguel 1:
  https://documentlibrary.qad.com/help/webui/sanmiguel1/en-US/index.html
- Channel Islands — Santa Rosa 2:
  https://documentlibrary.qad.com/help/webui/santarosa/index.html
- Channel Islands — Santa Rosa 1:
  https://documentlibrary.qad.com/help/webui/santarosa1/index.html
- Channel Islands — Santa Cruz 1 and 2:
  https://documentlibrary.qad.com/help/webui/santacruz/index.html
- Channel Islands — Anacapa:
  https://documentlibrary.qad.com/help/webui/anacapa/index.html

A system administrator can change the base online help URL setting for the QAD Web UI using Your Application Builder (YAB) commands. For example, configuring the online help to use the base URL for March 2019 (`https://documentlibrary.qad.com/help/webui/2019_0`) is as follows:

1. In the installation directory, locate the `/build/config/configuration.properties` file and edit it (for example, using `vi`) to include the following settings:
```
qad-webshell.online-help-url=https://documentlibrary.qad.com/help/webui/2019_0
qad-webshell.help.defaultGroupContext=QAD
qad-webshell.help.supportedLanguages=en-US
```
2. On the command line, reconfigure the environment by entering: `yab reconfigure`
3. Restart the environment by entering: `yab stop start`

Role Permissions Management

Unless permissions for standard functionality are found to be missing, users should not modify Channel Islands permissions for standard, QAD-provided roles. If you want to change the permissions in a standard role, instead of modifying the existing role, create a new role, copy the role menu of the standard role to the new role, and change permissions on the new role.

Tablet Usage Guidelines

Please note the following guidelines for using the QAD Web UI on a touchscreen tablet.

Interaction Guidelines

- For tablet use, the user interface is only supported on iPad Pro (or newer equivalent) with the Safari web browser. Although other tablets can be used, you may experience differing levels of performance and user experience.
- The QAD Web UI is optimized for landscape mode: most tablets in portrait mode are not quite wide enough to fit all of our fields and full menu.
- For data-entry tasks, an external keyboard is highly recommended.
  - If using the tablet's virtual keyboard, consider using an alternative keyboard app for improved functionality and view area usage.
  - If using the tablet's virtual keyboard, use the tablet's settings to make the keyboard smaller so that it does not cover too much of the view area.

    - On some tablets, the virtual keyboard can obscure the view area, especially when used in landscape mode.
- On a tablet, QAD Web UI views do not offer a hybrid mode where you can simultaneously access browse and form data.
- Configuring views and stored views is best done on a larger desktop or laptop screen.
- Double-click actions are not supported on tablets.
- Hover events are not supported on tablets.
- The browse grouping (Group By) feature is not yet available for tablet use.
- The Design Layout mode for extending forms is not available on tablets. This feature requires more screen area and so is only available for laptop or desktop use.

Note Although the Surface Pro has a touchscreen, the QAD Web UI works on the Surface Pro as it does with regular laptop and desktop devices. These interaction guidelines do not apply to the Surface Pro.

Note Windows 10 can automatically scale displays by 150% for high-resolution screens. For best results, change the automatic 150% scaling factor to be from 125% to 100%.

Performance Guidelines

On a tablet, for performance reasons, open no more than five levels deep of drill-down modal dialogs. If you need to drill down more than five levels deep, open the next drill-down modal dialog in a new browser tab.

For high-speed broadband connection performance, the following is recommended:

- Minimum download speed 16 mbps
- Maximum latency 150 ms

Terminology

Business Component. On the user interface and in the documentation, the term “business component” is now being used instead of “business entity.” In this context, a business component brings together the business logic and data necessary to represent a business activity within the application. This change, made in the San Miguel 2 (September 2018) release, is intended to avoid confusion with other possible uses of the term “entity” and “business entity.” (For example, in corporate law, the term “business entity” refers to an legal entity that engages in a business activity.)

Business Document. The Channel Islands – March 2019 release introduces business documents, which bring together a set of related business components in a parent-child relationship. When creating a business component, you can specify it as a business document and then the system automatically generates the business document structure based on the business component’s existing relationships.

App. Related business components are now organized into apps. Prior to the San Miguel 2 (September 2018) release, apps were referred to as modules.

QAD Web UI. The web-based user interface for the Channel Islands program is called the QAD Web UI. Prior to the San Miguel 2 release, it was called the Channel Islands UI.

Features in Channel Islands 2019 (March 2019)

User Interaction Features

These new features extend the capabilities and user experience of the QAD Web UI:

- New sign-in screen, with new logo, with more space for version and environment information
- For drop-downs offering more options, the ellipsis (...) icon has been replaced by "More"
- Description fields can now include a Translation modal dialog to support having descriptive comments in multiple languages (Financials only)
- Hierarchical data grids now support a "Collapse All" display option
- Hierarchical data grids now support multi-tab display of data
- Keyboard navigation now supported for browses where grouping (Group By) has been applied
- Streamlining of actions workflow
- General form layout improvements
- Overall performance improvements

Action Center Features

New Action Center features include:

- Drill to browse capability, which allows you to access the underlying browse used in a visual, and to also drill down to related browses and views
- A new Operational Metrics History browse, which is available for use as a KPI definition source. You can now keep track of a metric periodically (for example, daily) and visualize the trend over time using a visual. When setting up the KPI, specify the Metric History browse (urn:browse:mfg:an004) as the data source, with search criteria to filter for the desired metric data. Next, to update the operational metric history data, run the report named "Report to run OpMetrics automatically" for a specific operational metric (for example, for OPERATIONAL_INVOICES_VALUE). You can then schedule the report to run periodically (for example, daily) to get a snapshot of the history on a daily basis.
- The ability to add or remove active fields in an existing KPI definition:

  Existing visuals are updated so that you can use new active fields to further configure each visual.

  In previous releases, adding or removing active fields removed all existing visuals from the Visuals panel in the KPI definition. Now, you can add or remove active fields without losing the visuals.

  Note You can also remove active fields from the KPI definition. Any formula, filter, or unpublished visual that references the field is deleted. Published visuals that reference an inactive or modified field are still visible in action centers. But they may not display the expected data because a field that is used in the visual is no longer accessible or has changed.
- A new predefined Fixed Assets Manager action center, with visuals for monitoring asset cost, accumulated and YTD depreciation, net book value, acquisitions, and retirements.
- Updates to existing predefined action centers
- Performance improvements: by default, data columns not used in any visuals are not included in the visuals processing.

Note FRW-based KPIs can only show data in action centers if FRW reports have been set up in the QAD .NET UI and FRW-based KPIs are created in the QAD .NET UI with names that match the FRW-based KPI definitions. For information on how to set up FRW reports and create FRW-based KPIs in the QAD .NET UI, see *QAD Financials User Guide*.

Customer Management Features

New Customer Management features for Sales and Service include:

Sales

- Customer scheduled orders is now supported for entering into long-term agreements for regular releases to determine scheduled shipments:
    - Customer Scheduled Orders (hybrid view) — allows users to review and change customer scheduled orders
    - Customer Scheduled Orders Line Copy action — allows users to quickly copy a specified line and modify this line as needed.
    - Customer Scheduled Release (hybrid view)
    - Customer Scheduled Release Lines (browse) — provides consolidated access to all schedule types (plan, ship, required ship) and visibility of scheduled releases.
    - Customer Schedule Comparative (released as Customer Schedule Comparative Extract in 2017 EE) — allows users to compare successive planning and shipping releases against the same schedule, color-coded to identify excessive variance.
- Customer Items (hybrid view) — allows users to define the customer item number for any of your internal items.
- Various Dashboards corrections
- EMT Purchase Order performance improvements
- Performance improvements

Service

- Customer quotes capability to set up customer quotes for service or depot repairs. Service Orders and Depot Orders have a new action, Create Quote.
    - Customer Quotes (hybrid view) with Release action to release customer quotes.
    - Customer Quote Print (report)
- Sales Workflows (hybrid view) — allows users to define the sequence of steps. For example, you can define how a depot order can move from one status to another, allowing the status to move from Pending to Complete.
- New Depot Orders actions so users can quickly access the next step in the process:
    - Workflow Move action — users can now move a depot order to a different step in the workflow
    - Create Quote action — users can now create a service quote
    - Add Service Labor action — users can now record labor on a depot order
- New Service Orders Actions:
    - Create Quote
    - Add Service Labor
- Depot Order Receipt History — if Keep Booking History is selected in Sales Order Control, in Depot Repair Orders, when you select Action > Receive Order, the system automatically creates an RCT-DEP transaction in the transaction history. Note that depot order receipts have a transaction type of memo, so they have no impact on inventory.

- Parts List panel extended to Deport Order Detail — the panel shows the parts associated with each line on a depot order. These parts will default based on the Service BOM for the item being serviced, but you can modify the parts list as needed.
- Parts List panel extended to Service Order Detail — the panel shows the parts associated with each line on a service order. These parts will default based on the Service BOM for the item being serviced, but you can modify the parts list as needed.
- Service Activity Processing Report — in Service Activity Report, select Action > Process (SAR) to get a report of the processing summary and error details for records that failed to process.
- ISB Move during Create RMA action — allows a support representative to record that an installed base (ISB) item has been moved from one end user (and location) to another. To do so, select Action > Create RMA from an Action Request or Service Order. You can enter a new end user and optionally recalculate the warranty coverage based on the move date.
- Performance improvements

Manufacturing Features

The Manufacturing features in this release include the following.

Engineering

New Engineering features include:

- Routings (hybrid view) — enables users to manage the operations for manufacturing a product. It also provides the Item Routing Assignment panel, supporting alternate routing management, where the routing can be assigned to multiple items. You can also use this view to define alternate routings for a given item. You can use any of the item routings defined here when you create a production order.
- Product Structures (hybrid view) — enhanced to include the Item Structure Assignment panel, allowing a product structure to be assigned to multiple items. You can also use this view to define alternate routings for a given item. You can use any of the item routings defined here when you create a production order.

Planning

Planning now includes:

- Planned Orders (hybrid view) — users can review orders planned by MRP. They can use Action > Bulk Firm Production or use the Auto Firmed Planned Orders report to select one or more planned orders and change the status to Firm.

  With this view, users can fill demand with Material Planning. It supports the following actions:

  - *Bulk* Firm Production
  - *Bulk* Delete

Costing

The menus for the Cost Accounting Manager were restructured for this release. New menus were added, and the new menus include several new hybrid views, reports, and browses that depict costing and other related data. The Cost Accounting Manager role now includes the following menus:

- Inventory
- Production
- Product Costing

- Requisitions
- Cost Analysis
- Cost Planning
- Cost Elements
- Cost Simulation
- Linked Site Costing
- Periodic Costing Setup
- Periodic Costing Analysis
- Periodic Costing Close

The following QAD Reporting Framework (QRF) reports have also been included:

- Cost-Set Copy to Cost-Set
- Cost Set to Site Assignment
- Cost-Set Delete
- PC Prod Order WIP Cost Report
- PC Prod Order WIP History Report
- Item-Element Cost Calculation
- Item-Element Cost Name Change
- Co/By Products Cost Report
- Routing Cost Roll-Up
- Product Structure Cost Roll-Up

The Cost-Set Copy to Cost-Set, Cost Set to Site Assignment, and Cost Set Delete reports give a cost accountant the ability to copy or assign cost sets from one site to another, or to delete / archive cost set information. These reports offers the opportunity to review the results before doing any updates. Additionally, with the Comparative Cost Sets report, you can compare cost sets across sites for one or more items.

Production

This release offers Production Orders functionality for managing discrete and repetitive production, including planning and preparation for production (planned order approvals, production order BOMs, routings, component allocations and picking), production order release, split, and close. Transactional functions to supply materials or report production activities are done using QAD Automotive Solutions or using the QAD .NET UI.

- Production Orders (hybrid view)

  This view allows users to manage production orders and supports the following actions, enabling users to review and manage production orders, and use actions to do the next step in the process (allocating, releasing, printing, or splitting orders). You can also select a group of production orders and calculate a bulk pick list or do an accounting close. Actions include the following:

  - *Individual* or *Bulk* Allocate
  - *Individual* or *Bulk* Release
  - *Individual* or *Bulk* Print
  - *Individual* Split Order
  - *Bulk* Calculate Bulk Picklist

    - *Bulk* Accounting Close
- Production Order BOMs (hybrid view)

  This view enables users to manage the production order bill and supports the *Individual* Allocate action.
- Production Order Routings (hybrid view)

  With this view, users can review and modify the routing operation for a production order, as well as the components associated with the operation.
- Repetitive Cumulative Orders (hybrid view)

  This view supports creation, modification, and deletion of repetitive cumulative orders. It also supports the *Bulk* Create Orders action.
- Production Order Release/Print (report)
- Production Order Bulk Picklist (report)
- Production Order Order Picklist (report)
- Production Order Accounting Close (report)
- Post Production Order Usage Variances (report)

Inventory

Inventory Detail is now available as a hybrid view which allows you to review and modify the regulatory attributes for items held in inventory at a particular site and location. In addition, the following actions have been added to Inventory Detail:

- Receive Unplanned. Use this action to register a receipt not related to any open sales, purchase, manufacturing, or quality order.
- Issue Unplanned. Use this action to register an issue not involving any open sales, purchase, manufacturing, or quality order.

The following reports have been added to Inventory:

- Zero Balance Delete/Archive. Use Zero Balance Delete/Archive to remove the inventory detail information for any item, site, location, lot/serial, and lot reference combination with zero quantity currently on hand. This report offers the opportunity to review the results prior to doing any update.
- Tag Inventory Valuation. Use this report to see the value, at GL Cost, of all the completed physical inventory counts (tags) so that you can properly plan for the impact on total inventory. Properly planning for the impact might include recounting one or more of the tags or creating or applying a "reserve" balance to the update. This report may be run for a specified site, location, product line, item number and/or ABC class, and cost set (Current, Standard). Review this information on the screen, print the PDF report or send the details to Excel for further analysis.

The following changes have been made to the Inventory Transactions hybrid view:

- Added the WIP Lot Trace grid. The WIP Lot Trace grid displays WIP lot trace data for the inventory transaction, including Produced/Consumed, Item, Item Description, Lot/Serial, Reference, Quantity, and Unit of Measure.
- Added End Location Balance field to the Inventory panel. This field displays the inventory balance of the item, lot/serial number, and reference in the specified site and location after the transaction was processed.
- Changed the following field labels. In each of these cases, there is no change to the field definitions:
    - In the Inventory panel, the Lot field label was changed to Lot/Serial.
    - In the GL Cost panel, the Cost Total field label was changed to Unit Cost.

    - In the GL Cost panel, the Extended Cost Total field label was changed to Extended Cost.

Supply Chain Features

The Supply Chain features in this release include the following.

Purchase Requisitions

Enhancements to Requisitions include:

- The system now includes the commodity code as part of the search logic for determining the default buyer for a requisition line when you are not using the Enforce Buyer to Line feature. Commodity Codes lets you associate a buyer with a commodity code/site combination.
- You can now update the Supplier Item field on both EE and Asset Management requisition lines.

Purchase Orders

Purchase Orders includes these enhancements:

- Channel Islands 2019 supports blanket order releases (EE and Asset Management) that have been created and released in the QAD .NET UI, including Receive Order and Return Order actions. Purchase Orders includes read-only information about the original blanket order.
- You can now modify Supplier Items for both EE and Asset Management order lines.
- Purchase Orders includes support for Intrastat history records during purchase order receipts and returns. Note that Intrastat corrections are not supported.
- It is now possible to return Asset Management subcontract purchase order lines.
- Additional enhancements in the area of purchase order receipts:
    - Tax amounts impact (Asset Management/PO integration)
    - Accrue taxes in FIFO environment (Asset Management/PO integration); note that Weighted Average and Last Cost are not supported in FIFO environment
    - Accrue taxes for subcontract receipt
- Additional enhancements in the area of purchase order returns:
    - Return subcontract (Asset Management/PO integration)
    - Accrue taxes in FIFO environment (Asset Management/PO integration); note that Weighted Average and Last Cost are not supported in FIFO environment
    - Tax amounts impact (Asset Management/PO integration)
    - Accrue taxes in Standard cost

Supplier Scheduled Orders

This release includes support for supplier planning and shipping schedules.

- Supplier Scheduled Orders shows key order information in view-only mode. It also includes fields that let you define tolerance thresholds for positive and negative variances between schedule releases.

  Note Continue to use QAD .NET UI to set up supplier schedules.
- Variance visibility features allow planners to specify variance tolerances on planning and shipping schedules, as well as to easily identify when the release-to-release variation in quantity is outside those tolerances.

- Supplier Scheduled Releases displays information about active and draft releases of planning and shipping schedules, such as Cumulative Received and In Transit quantity (quantities in ASNs received but not confirmed). The application also includes graphic indicators to identify variances between releases. Additionally, the Manage Schedule Releases action lets planners update key values on releases; for example, to adjust quantity variations that are outside acceptable tolerances.
- New browses are available, including Active & Draft Supplier Scheduled Release Detail and Historical Supplier Scheduled Release Detail. Detail data can be exported to Excel to support further analysis.
- Drill-downs provide tools for planners to analyze further information for a particular releases (for example, inventory details, master data).
- An enhanced Update Schedules from MRP QRF report is now available. The restructured output includes information about the success or failure of the schedule creation process on summary and detail levels.
- Supplier Schedule Print is available as a QRF report.

Asset Management

This release expands the functionality of Asset Management. New features include:

- Asset Work Order Step Completion. You can now require that all individual steps on a work order instruction list be marked as complete before the work order can be closed or finished.
- Asset Work Order Finish Approvals. An approval process has been added that routes work orders through different approvers before the work order status can change to Finished.
- Channel Islands 2019 supports blanket order releases (EE and Asset Management) that have been created and released in the QAD .NET UI, including Receive Order and Return Order actions. Purchase Orders includes read-only information about the original blanket order.
- Support for links to external websites from Asset Work Orders and Asset Work Order Close
- Equipment (hybrid view)
- PM Templates (hybrid view)
- Master Instruction Lists (hybrid view)
- Master Parts Lists (hybrid view)
- Indirect Inventory (browse with Issue and Return to Inventory actions)

Financials Features

This release expands the Financials functionality while introducing the new Fixed Assets functionality.

New Financials functionality includes:

- In Supplier Invoices, you can create standard supplier invoices. (Note that standard supplier invoices are regular invoices; that is, they are not credit notes or correction invoices.)

  For this release, you can create supplier invoices of type Initial. Other invoice types are read-only.
- In Receiver Matchings, you can retrieve pending invoices associated with a purchase order so that you can record invoice lines against them. In this release, only initial receiver matchings without variances are supported.
- Supplier Payments enables you to create and maintain supplier payments.
- Supplier Payment Selections enables you to create or modify a supplier payment selection and submit it for approval.
- Journal Entries enables you to manually record transactions for financial daybooks.

- The Customer Activity Dashboard offers a comprehensive overview of all activity related to a single customer, including invoices, payments, and credit details. You can review information from one or more entities, and select the currency for displaying values. Everything you need to know about a customer is accessible from this dashboard using drill down links: customer data, payments, invoice history, credit, sales orders, customer balance, and invoice activity. You can record a customer payment and match it to an open invoice using the Customer Payments drill down link.

Fixed Assets

This section describes the new Fixed Assets capability in Channel Islands, accessed with the QAD Web UI.

Important Fixed Assets in the QAD Web UI is available to customers in addition to the version of Fixed Assets in the QAD .NET UI. These two different Fixed Assets applications do not run side-by-side. A conversion procedure is provided in the QAD .NET UI version to uplift the existing records for use with Fixed Assets in the QAD Web UI.

The new Fixed Assets offers processing capabilities for the full asset life-cycle from acquisition to retirement. There is integration to QAD Financials for updates to the GL, along with advancements in asset activation, transaction processing, and reporting. When an asset is created with Enterprise Asset Management, integration enables you to capitalize and manage that asset in Fixed Assets.

There are two fixed assets roles:

- Fixed Assets Manager
- Fixed Assets Clerk

Security settings enable the division of responsibilities.

For the Fixed Asset Manager, an asset activation process assists accurate asset creation. The Fixed Assets Action Center provides KPIs on asset value and performance so the Fixed Asset Manager can monitor fixed assets balances.

The Fixed Asset Clerk can process depreciation and any other transactions that can arise during the lifetime of an asset easily and update the GL directly using Fixed Asset Transaction Posting and Reversal. The Fixed Asset Clerk can also simulate postings to review transactions before actually posting them to the ledger.

When implementing Fixed Assets in the QAD Web UI, use Fixed Assets Control in the QAD Web UI to specify the control settings. (Fixed Assets Control specifies settings that are similar to the settings in the Fixed Assets Control File function in the QAD .NET UI.)

Fixed Assets is implemented at domain-level. Use Fixed Assets Control to specify how Fixed Assets will work in the domain. Use Fixed Asset Methods to set up the depreciation methods that your organization uses. The depreciation methods in this release are straight line and declining balance. The declining balance depreciation method allows an option to base calculations on financial period end. In addition, there is an option to accelerate depreciation in the final period of the asset life if a balance remains.

Use Fixed Asset Books to set up depreciation books for fixed assets and to specify daybooks that record different transactions for the asset. Within Fixed Asset Books, you can add daybook, transaction type, and entity for better transaction visibility in the general ledger.

You assign assets to classes and locations. Site and GL Projects are available in Fixed Assets Locations for improved analysis. You can also optionally use Fixed Asset Calendars to set up calendars for non-posting books.

There are a number of reports available:

- Fixed Asset Register Report
- Fixed Asset Transfer Report
- Fixed Asset Depreciation Schedule Report

The Fixed Assets view enables you to create an asset and update its status. For an asset that is assigned an Active status, you can post its acquisition to the GL. The Fixed Assets view also enables you to add attachments and a picture of the asset to each individual asset record, allowing auditors to immediately verify the asset. On this view, you can also transfer or split an asset during its lifetime. You can retire an asset at the end of its life. During the lifetime of the asset, you can perform asset depreciation and cost and salvage adjustments. Excel integration also allows you to add or update asset records easily.

To run Fixed Assets, you must be running at least QAD Enterprise Edition 2015 Cloud or 2016 On Premise, and you must install QAD Financials 2019 and QAD Cloud ERP 2019.

Base Data Features

Base Data hybrid views include the following enhancements to the Employees and Items hybrid views:

- Employees hybrid view now supports Pay Rate settings
- Items hybrid view supports the Picking parameter, which is used by Production
- Item-Site Inventory also supports the Picking parameter, which is used by Production

Platform Features

New Platform features for extending the functionality include the following:

- Business Components (hybrid view) — the functionality of the View Builder, which was previously a separate hybrid view, is now combined with Business Components to improve the workflow for extending the system.
- Building and editing forms for a hybrid view is now opened from the Business Component hybrid view, which launches the Form Builder.
- Drill Down Links for Reports and External Links: the Business Component's Form Builder includes a pop-up window for specifying Drill Downs. In addition to specifying drill downs to hybrid views (`urn:view:hybridbrowse:*`) and browses (`urn:browse:*`), you can now also specify drill downs to reports (`urn:report:*`) and external links (URLs).
- Business Documents — a business document is a set of related business components in a parent-child relationship. When creating a business component, you can specify it as a business document and then the system automatically generates the business document structure based on the business component's existing relationships.
- Further Business Components enhancements include:
    - Adding fields from related business components
    - Defining business component relationships
    - Support for business documents, which bring together a set of business components
    - Support for custom elements
    - Ability to define drop-down fields
    - A business component can now be enabled for the Approvals workflow.

Administration Features

Approvals

A business component can now be enabled for the Approvals workflow. This is available as part of the Platform's Business Components view.

Security

The Security features in this release include the following:

Record-Level Security

Important Before implementing record-level security, contact QAD to review configuration requirements and to evaluate how it will affect your system.

Record-level security allows you to restrict user access to individual records. Access to secured records can be granted to individuals, groups, or with everyone in the system through sharing. The new screens involved with record-level security are:

- Record Level Security — You can enable record-level security for a business component from this hybrid view.
- Secure Records — The Secure Records browse lists one entry for each record that is secured in the system. You can use the browse to change ownership of secure records, either as an individual or bulk action. The Secure Records Details browse lists every user who has access to each record and what level of access the user has.
- Security Groups — You can now organize groups of users for record sharing with the new Security Groups hybrid view.
- Security Rules — With the Security Rules hybrid view, you can automate sharing with rules that filter and apply record-level security permissions. Security rules can be applied to individual users or to groups of users, using security groups.

Sharing

Records can be shared using the Share option in the More menu on individual records. Users can copy the Link to Share URL and send the link to other users through email. Records that have been secured through record-level security can be shared manually from the Share modal, through security rules, or with APIs.

Security Control

Use the Security Control hybrid view to establish basic security parameters for your environment and to define the way you want to set up and control passwords.

Features in San Miguel 2 (September 2018)

User Interaction Features

These new features extend the capabilities and user experience of the QAD Web UI:

- Information and warning message display improvements: the information and warning messages are now displayed in a vertically-oriented right-hand panel, which reduces potential distractions during data entry while improving message accessibility.

- Excel Integration: on a limited selection of hybrid views, in addition to exporting data, you can now also import data from Excel. The data must be structured based on the business component for the hybrid view, which can be determined by doing an initial export of sample data.
- Stored views with search criteria: you can now specify stored search default settings and include those settings as part of a stored view.
- Hierarchical form grids: grids on forms can now show parent-child data relationships.
- Column menu on form grids: a drop-down menu (indicated by the ellipsis icon) is now included on form grid columns, allowing you to sort, filter, and total column data. Additionally, numeric fields include average, count, minimum, maximum, and sum. Non-numeric fields can be counted when Group By is applied.
- Group By option for form grids: on a form grid, from the More button, you can apply the Group By feature to form grids (on hierarchical form grids, only applies to the first level).
- The More button was also added and will allow users to group data in the grid. This behaves similar to how it behaves in browses.
- QAD Web UI color changes for alignment with QAD brand color palette.

Action Center Features

New action center features include:

- Three new predefined action centers:
  - Maintenance Manager action center
  - Operations action center
  - Production OTIF action center
- New and enhanced KPIs for the Purchasing Manager action center.
- New query service to improve performance and provide expanded capability. The previous dataset limitation of 5000 dataset records was solved by automatically aggregating the data when it is retrieved for the action center. Now, hundreds of thousands of browse records are automatically summarized in a small data set that has no more rows than strictly needed for the visuals and for efficient processing in the action center.
- In the KPIs view, you can now select 20 fields from the underlying browse or Financial Report Writer (FRW) KPI to include in the KPI definition. Previously, the maximum number of fields permitted was 15.
- A KPI migration tool for the export and import of KPIs was added to the menu. With this tool, a KPI created in one environment can be migrated to another environment, for example, from a test environment to a production environment.

Platform Features

New Platform features include:

- View Builder:
  - Conditional Grid Column Styling: ability to include a background color or colored icon in a form grid row, based on a specified condition.
  - Configure Business Component Browses
  - Option to hide Activity panel
  - Group Fields by Field Group in Add to Layout
  - Event Handlers panel for adding event handlers, enabling for example UI triggers

- Business Components hybrid view includes settings for Formula Fields and UI Events
- Drill Down Configuration in View Builder and Design Layout
- Management of Duplicate Field Names
- Apps:
  - Show implicit app dependencies
  - Select explicit app dependencies
- Data extension capabilities for standard business components

Asset Management Features

The Enterprise Asset Management (EAM) functionality is being introduced in the Channel Islands program with the new Asset Management app. In Asset Management, Work Orders are now called Asset Work Orders, and EAM Service Requests are now called Maintenance Requests. New features include:

- Asset Work Orders (hybrid view)
- Asset Work Order Close (hybrid view)
- Maintenance Requests (hybrid view)
- Maintenance Manager (action center)
- Projects, with Jobs form grid (view-only)

Important In this release, enabling the Asset Management app requires additional configuration steps to update the Enterprise Asset Management (EAM) database and perform data synchronization. Using the Asset Management app in the QAD Web UI can change how you use EAM in the QAD .NET UI. Please work with QAD to enable the Asset Management app in the QAD Web UI.

Base Features

The Base app manages essential data needed in common throughout the application. New features include:

- Currencies (hybrid view, create and update only)
- Rounding Methods (hybrid view)
- Supplier & Schedule Price Lists (hybrid view, create and update only)
- Languages (hybrid view)
- Shared Sets (hybrid view)
- Item Site MRO (hybrid view, limited)

Customer Management Features

The Customer Management apps support all phases of the customer lifecycle from acquiring customers, through managing orders, pricing, fulfillment, along with service, and support. This release includes new Sales and Service features.

Sales

- Sales Orders Actions:
  - Revalue Cost Action
  - Allocate Action improvements
- Sales Quotes Actions:

  - Reprice Action
- Sales Item Pricing report: This is an improved report based on the Pricing What If Inquiry in the QAD .NET UI.
- Available To Promise report: includes sites across domains and databases if they are included in the Sourcing Rules used for Global Sales Orders.
- Global Sales Orders
  - System now recognizes sites across databases: used in sourcing rules, used in the ATP or Inventory check, and used to get the status of the EMT sales order.
  - Requires Enterprise Edition 2015 databases or higher (connections to previous versions would require QAD Services engagement).
- Enterprise Material Transfer (EMT): Visibility at the Primary Business Unit (PBU) of the order status changes from the sourcing site or Secondary Business Unit (SBU) when the order has been shipped.

Service

- Depot Orders, with actions for receipts, restocking, and service labor, including:
  - Receive Order Action
  - Ship Allocated Action
  - Restock Order Action
  - Add Service Labor Action on the depot order line
- Material Orders, now with ship and usage actions, including:
  - Auto-Create Lines
  - Ship Allocated action: creates and confirms the shipper; also allows you to print that and automatically consume the material order. Then, on the QAD .NET UI's Pre-Shipper/Shipper Workbench and Shipper Unconfirm utility, you can now un-confirm or modify shippers for material orders.
  - EMT Source sub-panel: provides the visibility of the Secondary Business Unit (SBU) order information at the Primary Business Unit (PBU).
  - Service Activity Reports: Select Item Usage/Return from the material orders
- Service Pending Invoice (Process Activities Workflow Option: creates a pending invoice from the Web UI).
- End User Domain Settings (hybrid view).
- New Service panels in Items (hybrid view) that leverage the extensible End User and Item business components in the Base app.
- New option "Close Depot Order on Invoicing" on SSM Accounting Control: now the depot order can be automatically closed after the invoice is posted.
- EMT Source sub-panel on RMAs: provides the visibility of the Secondary Business Unit (SBU) order information at the Primary Business Unit (PBU).

Financials Features

New Financials features include accounts receivable, accounts payable, general ledger, and chart of accounts setup capabilities:

- GL Accounts (hybrid view)
- Sub-Accounts (hybrid view)

- Cost Centers (hybrid view)
- Project Groups (hybrid view)
- Project Status (hybrid view)
- Projects (hybrid view)
- SAF Concepts (hybrid view)
- SAF Structures (hybrid view)
- SAFs (hybrid view)
- Journal Entries (hybrid view, limited view-only)
- Customer Credit Rating Categories (hybrid view)
- Customer Invoices (hybrid view, limited)
- Customer Payment Status (hybrid view)
- Customer Payments (hybrid view)
- Deduction Categories (hybrid view)
- Customer Activity Dashboards (hybrid view, view-only)
- Supplier Invoices (hybrid view, view-only)
- Supplier Payment Status (hybrid view)
- Payment Groups (hybrid view)
- Supplier Payments (hybrid view, view-only)
- Supplier Payment Selections (hybrid view, view-only)
- Supplier Activity Dashboards (hybrid view, view-only)
- ERS Configuration (hybrid view)

Manufacturing Features

New Manufacturing features include:

- Locations (hybrid view)
  - Includes ability to specify Customer Reserved location
- Inventory Transactions (view-only)
- Inventory Detail browse now includes Transfer action for non-serialized inventory items
- Cycle Count browse actions:
  - Cycle Count Results
  - Cycle Count Worksheet Create
  - Item ABC Status Update
- Inventory Tags browse actions:
  - Inventory Balance Update
  - Tag Delete
  - Tag Print
  - Uncounted Tag Update
- Item Packaging browse actions:
  - Packaging Simulation
  - Packaging Hierarchy

Supply Chain Features

New Supply Chain features include:

- Purchase Order Enhancements:
  - Order indirect materials (including EAM items)
  - Charge Order Lines to EAM Asset Work Orders, Equipment, Stores Requisitions, Projects & Jobs
  - Enhancements to support manufacturing Work Orders, Repetitive, Production Order subcontract workflows
- Requisitions Enhancements:
  - Release to purchase order action combines direct & indirect materials (including EAM items) on the same purchase order document accessible from the QAD .Web UI.
- Purchase Order Receipts Enhancements:
  - Support manufacturing Work Orders, Repetitive, Production Order subcontract workflows
  - Receive indirect materials (including EAM items)
  - Intrastat History at receipt
  - Receipt with site transfer
- Purchase Order Returns:
  - Return to supplier direct and indirect materials (including EAM items)
  - Return items based on original receiver information for non-consigned returns
- Other Supply Chain Enhancements:
  - New and Enhanced KPIs for Purchasing Manager Action Center
  - New reports available in the QAD Web UI
    - Unmatched Purchase Order Receipts (new Excel format available)
    - Aging Inventory by Order
    - Aging Inventory by Item
    - Requisition Document Print
    - Purchase Order Return Document Print
    - Distribution Order Print
    - Distribution Order Pick List Print
    - Logistics Charges Print
    - Supplier Schedule Print
    - Supplier Schedules
    - Supplier Scheduled Orders

Administration Features

New administration features include:

- Global Distribution (view-only): provides information on the status of the distributed environment. This will include all the properties sent in the broadcast by each environment.
- Alert Delivery Configuration: on the Alerts form, when the option “Send alert when conditions are met” is selected, a new Delivery option offers the following options:
  - Immediate (when conditions are first met)
  - Delayed (when conditions are still true)

    - Relative (before or after a variable date)

  Additionally, the Repeat option includes settings for Every *n* Days, *n* Hours, and *n* Minutes.

Security Features

New security features include:

- Role Permissions: search and usability enhancements, including use of icons to distinguish resource types.
- Roles (hybrid view): create and manage roles in the system.
- SAML SSO (Security Assertion Markup Language, Single Sign-On). Administrators can can configure sign-in options that display when signing in to the QAD Web UI.
- Portal landing page to support multiple login options.
- Access Card Authentication
- Security and Menu Performance Improvements
- Copy & Merge action on Menus (hybrid view) for copying multiple roles to create new roles.
- X509 Certificate Authentication
- Dialog to change new or expired passwords upon signing-in, with a password strength indicator based on the password policy.
- Launch QAD .NET UI from QAD Web UI with one time token to avoid login prompt.

Features in San Miguel 1 (March 2018)

The following summarizes new features in the Channel Islands — San Miguel 1 release:

User Interaction Features

- Platform - Extra Conditions on BE Relations
- Swagger Styling Updates
- View Builder
    - Add Non-Entity Fields, Labels and Buttons to Layout
    - Add Grid to Layout
    - Field Groups (Nested Grids)
    - Conditional Grid Column Styling
    - Typescript Handlers
    - Element Properties
- Browses and Forms
    - Multi-select and Append
    - Site Context on Browses and Forms
    - Group-By Enhancements
    - Create New from Drill-Down List
    - Disallowed Messages Styling Update
    - Sort Icon Styling Update
- Security

    - User Access
- Inbox and Approvals
    - Inbox Keyboard Navigation
    - Alternate Approvers
- Alerts
    - Alerts Redesign
    - Alerts Delay
- Miscellaneous
    - Context-Sensitive Help
    - Cancel Modal for Tasks in Reporting Framework Queue
    - Supplier Portal - External Link

Customer Management Features

Sales

- Spare Parts Orders
- Credit Check Action
- Global Order Management
    - ATP/EMT Visibility
    - EMT Tracking
- Sales Quote Copy
- Sales Quote Release Attachment Workflow

Service

- RMA Completion
- RMA Replacements
- Service Order Completion
- SAR Transaction Processing
- Installed Base
- Material Orders
- ISB Move

Manufacturing Features

Inventory

- Enhancements to Inventory Action Center
- New Inventory Manager module and role menu

New Inventory Manager role menu includes the following drop-down menus:

Value

- Inventory Days On Hand browse

- Inventory Depreciation Rate browse
- Inventory Value by Item browse
- Inventory Scrap by Account report

Usage

- Inventory Activity by Item browse
- Inventory Transactions browse

Inventory

- Inventory by Item browse
- Inventory Detail browse
- Inventory Serial Detail browse
- Inventory report
- Inventory Detail report
- Inventory Allocations report

Validation

- Cycle Count browse
- Inventory Tags browse
- Inventory Transactions browse

Warehouse

- Inventory Locations browse

Traceability

- Lot Groups browse
- Packaging Codes browse
- Packaging Structures browse
- Item Packaging browse

Costing

- Support for PO Receipts and PO Returns

Transaction History

- Support for PO Receipts and PO Returns

Engineering

- Production Lines (for Production Orders)
- Production Line Items (for Production Orders)

Financials Features

No updates for the San Miguel 1 release.

Supply Chain Features

Purchase Order Enhancements

- Cancel PO
- Taxes: Update Tax Records
- Unit of Measure Conversion

Generic Approvals Enhancements

- PO Approval when Generic Approval Fails
- Approval Currency for PO Approvals

Purchase Requisition Enhancements

- Buyer Out of Tolerance Control
- Unit of Measure Conversion

Purchase Order Receipts

- Basic Receipt Functionality
  - Error Messaging
  - Create Inventory Records
  - Create Unmatched PO Receipts
  - Update PO Document at Receipt
  - Create Unposted GL Transactions
  - Create Transaction History
  - Update MRP
  - Multi-level Detail for Receipts
- Supplier Consignment Receipt
- Accrue Taxes at Receipt
- Cancel Backorder
- Support UOM Conversion
- Feed into ERS process
- Dynamic locations
- Reports and Browses
  - Purchase Order Receipt Print
  - Receipt Transactions

Base Features

- Dock (create and update only)
- Reminder & Remittance Address (create and update only)
- Carrier (create and update only)
- Employee (create and update only)

- Combined Static and Analysis Group into one menu item called Analysis Groups, which has been extended to include Ship-To in addition to Item and Customer.

Foundation Features

Foundation enhancements include many structural enhancements, along with the following:

Web UI

- User Experience and Styling Improvements
- Context-Sensitive Help
- View Builder Enhancements

Platform

- REST Service Generator and Swagger Documentation

Security

- EAM (Site) Security
- Role Permissions Enhancements

Action Centers

- You can now export and import a KPI from one environment to another environment, using the Action menu for the KPI's view.
- You can now create KPIs from Business Entity browses in the same way as you can create KPIs from Financials and Manufacturing browses.

Features in Santa Rosa 2 (September 2017)

The following summarizes new features in the Channel Islands — San Rosa 2 release:

User Interaction Features

Action Centers

- Action Centers with KPI Builder and Gallery - new action centers with expanded analytics capabilities

Platform

- Platform development features: View Builder and Business Entity Create

Forms

- Summary panel layout enhancements with primary image
- Expandable form grids (Max Height setting)
- Expandable configuration panel
- Improved form panel layout (less padding between panels allows more panels on screen)

- Scrollbar enhancements for improved usability
- Color enhancements for improved readability

Browses

- Browse totaling included with browse grouping (Group By with totals)
- Export browse data to Excel files, Comma-Separated (.csv) files, and more
- Color enhancements for improved readability

Inbox

- Inbox design and layout enhancements for improved usability and coordination with Action Center mobile app
- Inbox Mass Approvals: you can now select and approve multiple tasks
- Inbox Archive: you can view tasks that have been acted upon & notifications that have been archived.
- Notification preferences setting on User Profile, so you can specify how you want to receive notifications

Alerts

- Alerts: you create and configure alerts, including integrating with the existing activity feed.

Attachments

- Keep with Workflow option
- Primary Image option

Administration and Security

- Menus management
- Users management
- Role Permissions management
- Logging settings

Customer Management Features

Sales

- Sales Order Auto Allocations
- Confirmation and Repricing
- Copy Orders
- Copy Order to Quotes
- Quote Bulk Release

Service & Support Management (SSM)

- SSM BL Services for MFS
- Return Material Authorizations (Maintain Return Lines only)

- Service Activity Reports (Call Activity Recording)

Manufacturing Features

Automation Solutions

- Inventory and Production Transaction Services
- Supporting Cost Services
- Production Order Transactions

Financials Features

- Supplier Invoice Approval
- Action Center enhancements

Supply Chain Features

Purchase Requisitions

- Essential features (Close)
- Keep attachments through purchase requisition workflow

Purchase Orders

- Essential features (Delete, Cancel, Re-open)
- View Tax Records
- Intrastat
- Print and Email Purchase Orders

Generic Approvals Enhancements Adaptations

- Mass approvals with new Inbox styling
- Activity Feed and Attachments links for PO Approvals
- Approval Currency for PO Approvals

Base Features

- Item Copy
- Maintain End Users
- Creation of Static & Dynamic Analysis Groups for Item and Customer
- Added support to add specific Customers/Suppliers to Blocked Transactions

Features in Santa Rosa 1 (March 2017)

The following summarizes new features in the Channel Islands — San Rosa 1 release:

User Interaction Features

- Form Design Layout - modify layout and properties of panels and fields on a form.

  The Design Layout option is available by default only to users in the QAD Admin role.

  On a form, from the ellipsis icon (**...**) for more options, choose **Design Layout**, and then select **+ New Layout** to get started. In the Design Layout view, you can directly click on panels and fields and move them using drag-and-drop. For fields, you can view and edit the field properties to set the default value, whether the field is required, and other options. Note that field changes apply to the Business Entity that the form layout is using, and these changes can affect all other layouts using the same Business Entity.
- Browse Group By - display browse data hierarchically based on selected columns.

  On a browse, from the ellipsis icon (**...**) for more options, choose **Show Group By**. For Group By to take place, all the records of interest must be on the page.

  Apply browser filtering using the **Search** option as needed and make sure that all the browse records are on the page by setting **Records per page** to be greater than the number of records being displayed (that is, in the lower right corner, check the **Viewing page 1 - *n***: where *n* should be less than Records per page).

- Inbox Enhancements - extended Inbox interaction, including commenting and archiving.
- Keyboard Shortcut Enhancements, including a shortcut (**Alt + R**) to go to the right-hand options such as attachments, activity, and drill-down links.
- Process Maps - Process Viewer, Process Editor, and example, demo maps for Channel Islands. From the menu bar help option (question mark icon), you can choose Process Maps to open the home process map for Channel Islands. This map's nodes link to some example maps for Channel Islands processes. Nodes that launch Web UI resources have Links that start with the `QAD_CI` process properties variable that points to the Web UI server. Further, these nodes must have the Target node property set to New Window, which opens the Web UI resource in a new tab.

Note Currently it is not possible to launch the Web UI from a process map in the QAD .NET UI.

Security Features

- Cross domain/entity calls
- Process map Veracode certification and process map integration
- Process map Veracode certification
- Google analytics
- Role Permissions Sync

Base Features

- Create/Maintain Suppliers
- Create End Users
- Create/Maintain Business Relation within Customer and Supplier
- Create static Analysis Groups for Items/Customers for TAM
- Product Line Copy
- Implement Easing of Backwards Compatibility Changes

- Support for User-defined Fields for Item and Customer
- Approved Vendor List (AVL) — for defining information about Supplier Certification and Item Certification in the system, so that an extra control on the Suppliers or Items that can be entered in Purchasing is provided.

Customer Management Features

Sales activity from prospect to services, with new features supporting:

- Service Orders (Calls)
- Action Requests (Pending Calls)
- TAM Integration for Channel Islands
- Action Center Performance Improvements for Customer Service Manager

Financials Features

- Supplier Invoice Approval
- CFO Dashboard Enhancements
- More Financials APIs Available in QRA

Manufacturing Features

Making Engineering users more effective with new product structure features:

- Configured Items
- Formula/Process BOM
- Alternatives Grid
- Related Structure Grid

Supply Chain Features

Purchase Order enhancements, including:

- Create Purchase Orders
  - Master data defaulting
  - Totals and tax details visibility
  - Add CI Requisition lines to CI Purchase Orders
- Purchase Order documents
  - Feed into the Consignment process
  - Feed into the ERS Process
  - Feed into the Subcontract process
- Submit a Purchase Order for approval
- Overview of the PO documents created in a Domain

Purchase Requisition enhancements, including:

- Request items for different sites on the same requisition
- Add notes to my requisition

Supplier Certification (new):

- Certified Suppliers
- Certified Supplier Items

Supplier Portal in QAD Reference Architecture (QRA), with:

- Sign In, Menus
- Purchase Order View
- Receipts View
- Schedules View
- Activity Feed

Features in Santa Cruz 2 (September 2016)

The following summarizes new features in the Channel Islands — Santa Cruz 2 release:

User Interaction Features

User interaction features now include:

- Search across menu items
- New icons for menu item types
- Favorites settings and management
- Role-based menus, with discontinuation of the Show All option
- Browse drill-down feature, like the drill-downs on browse rows on the QAD .NET UI
- Ability to add and edit records from lookups
- Actions drop-down on certain browses for taking actions on selected or all browse records (batch selection)
- Globalization: local data and currency formats, language support
- Responsive design enhancements

Browses

All QAD browses available on QAD Enterprise Applications are now available on the Web UI (includes approximately 600 browses on the menu, with a total of up to 1,900 including lookups and drill-downs).

Reports and Report Viewer

All QAD Reporting Framework reports are available from the Web UI (includes approximately 450 reports). The Web UI includes a new Report Viewer for running and scheduling reports. Note that the report design features are available only on the QAD .NET UI.

Action Centers

Action Centers are next generation analytics dashboards, now available along with the current dashboards. The new action centers provide role-based actionable insights. This release includes action centers for Chief Financial Officer (CFO), Customer Service Manager (CSM), and Purchasing Manager.

Note that the QAD Financials 2016.1 module will also be required to use the Chief Financial Officer (CFO) Action Center.

New Role-based Menus

This release includes many new role-based menus.

Note The Show All option is no longer included as a role menu drop-down option. In the Santa Cruz 2 release, most of the Base Module functions are not assigned to specific role menus. These functions can only be accessed by searching for them in the new search feature on the menu bar.

Customer Management Roles

New Customer Management roles include:

- Sales Manager
- Sales Representative
- Pricing Manager
- Customer Service Representative
- Customer Support Representative
- Customer Support Manager
- Technical Support Representative
- Vice President of Services
- Marketing Manager
- Vice President of Marketing
- Executive Vice President of Sales and Marketing

Finance Roles

- AP Clerk
- Financial Controller
- Fixed Assets Manager
- AR Clerk
- Chief Financial Officer (CFO)
- Operational Controller
- AP Supervisor
- AR Supervisor
- Accounting Clerk
- Treasury Manager
- Tax Manager
- Consolidation Manager
- Accounting Manager

Manufacturing Roles

New Manufacturing roles include:

- Chief Operating Officer
- Master Scheduler
- Production Scheduler

- Production Material Planner
- Purchase Material Planner
- Production Manager
- Production Operator
- Warehouse Manager
- Material Handler
- Manufacturing Engineering Manager
- Product Engineering Manager
- Quality Manager
- Cost Accounting Manager

Supply Chain Roles

New Supply Chain roles include:

- Vice President of Supply Chain
- Director of Materials
- Buyer - Direct
- Buyer - Indirect
- Vice President of Logistics
- Logistics Manager
- Logistics Analyst

Base Module Features

New Base Module features include:

- Customer (create and update only)
- Customer Type
- Supplier Type

Note In the Santa Cruz 2 release, most of the Base Module functions are not assigned to specific role menus. These functions can only be accessed by searching for them in the new search feature on the menu bar.

Customer Management Features

New Customer Management features include:

- Release Sales Quote to Sales Order
- Quick Ship, Quick Pick, and Quick Invoice from Sales Order
- Confirm Pre-shipper
- Confirm Shipper

On Sales Order, 'Ship-To' lookup includes New and Edit options.

Financials Features

Financials features include Supplier Payment Selection Approvals.

Note For the Supplier Payment Selection Approval functionality, the QAD Financials 2016.1 module is required.

Manufacturing Features

Manufacturing features include Product Structure for discrete items, with one level drill down.

Supply Chain Features

Supply Chain features include the following:

- Purchase Requisition Approvals, which includes new Actions drop-down for bulk transactions.
- Requisition Approvals and Supplier Payment Selection Approvals included within Activity feed.

Security Features

QAD Channel Islands has achieved VerAfied certification (see http://www.veracode.com/ratings/qad). VerAfied certification means that Channel Islands met or exceeded the security score outlined in the Veracode Risk Adjusted Verification Methodology for an application at the assurance level specified above. Veracode's risk adjusted verification methodology is based on respected industry standards including MITRE's Common Weakness Enumeration (CWE) for classification of software weaknesses and FIRST's Common Vulnerability Scoring System (CVSS) for severity and ease of exploitability and NIST's definitions of assurance levels.

Additional security features included in this release:

- Background caching to improve performance of menu loading.
- Resource data loader to automatically add all browses and reports as secure resources and available to be added to a role menu.
- New `qra-sync` YAB command to call the resource data loader to synchronize menus and reports.
- New `sec-role-menu` YAB command to provide a list of secure resources associated with a role menu.
- Updated Role Permission Maintain (requires Financials 2016.1) to include URI in secure resource menu items (in Secured Resources tab).
- Added proxy layer to centralize security for Action Center, Configurator and Process Maps.
- Added a secure downloader for reports which ensures users are authorized before the report is downloaded.
- Updated `sec-resource-bom` YABcommand to support drill down dependencies in browses.
- Secure mobile login with Touch ID to support the new Mobile Action Center.
- New QAD Security Administration Guide that covers Channel Islands security topics.

Features in Santa Cruz 1 (March 2016)

The following summarizes new features in the Channel Islands — Santa Cruz 1 release:

Santa Cruz 1 was only for use with QAD Enterprise Applications — Enterprise Edition 2015 Cloud ERP.

Base Module Features

The Santa Cruz 1 release introduced the following Base Module functions:

- Attribute
- Attribute Category
- Attribute Category Link
- Attribute Profile
- Attribute Validation
- Blocked Transaction
- Default Daybook

Customer Management Features

The Santa Cruz 1 release introduced the following Customer Management features:

Sales Orders Enhancements

The Sales Order view now includes:

- Intrastat — support for inter-EC orders (including DE, IT, and NL)
- Line Pricing and Price Details form grid — ability to turn off best pricing when first creating order; grid shows pricing history on how net price was calculated.
- Quality Attributes — filter detail allocations based on attribute profiles for customer and item.
- Installed Base — ability to record service data prior to invoicing.
- CRM Integration — orders creating in the Web UI now included in CRM (version 6.7.2).

Sales Quotes

In Anacapa, Sales Quote was a read-only browse grid. In this release, Sales Quote a full view so that you can create and edit sales quotes in the Web UI. Sales Quote specifics include Release flag, Recurring, Released Count, Reason Lost, and Expire Date.

Quick Ship

With Quick Ship, theWeb UI supports ordered items that are fulfilled immediately because of over-the-counter sales or orders entered after inventory processed. This feature is similar to orders created in Pending Invoice Maintenance in the QAD .NET UI.

- New flag on order header only available during create.
- Order must be confirmed.
- Allocated quantity on items will be shipped.
- Lot/Serial controlled items must be detail allocated to ship.
- Shipper will always be created for shipment.
- NRM sequence for shipper numbers & assigned in Shipper Control is required setup for shippers.

Configurator Integration

With Configurator integration, the questionnaire is launched from the Order / Quote Line grid (or detail form). Note that the item must first be set up in Configurable Item Maintenance (on the QAD .NET UI). The variant item created or selection is placed on the order line and priced. To use this feature, Configurator version 5.8.1 is required.

Features in Anacapa (October 2015)

Anacapa, the first release of the Channel Islands, introduced the new web-based user interface. Along with selected Customer Management functions and Base Module functions, the user interface itself introduced a variety of features:

- Role-based menus
- Dashboards
- Inbox
- Views, grids, and forms
- Follow and tracking capability
- Stored views
- Attachments
- Activity feed
- Keyboard shortcuts

Role-based Menus

Channel Islands provides efficient access to what you need for your job role. The role-based menu bar provides a navigation experience tailored to your needs. QAD provides a default set of role menus, but each role menu can be configured by an administrator to best align with your company's needs. The roles introduced in Anacapa include:

- Customer Service Manager
- Customer Service Representative
- Purchasing Manager
- Sales Manager
- Vice President of Sales
- Administrator

In Anacapa, the Show All option shows all the menu options available across roles.

Base Module Features

The Anacapa release includes the following Base Module functions:

- Address Type
- Commodity Code
- Country
- County
- Corporate Group

- Customer Ship-To
- Daybook Set
- Generalized Code Group
- Generalized Code
- Item Fiscal Class
- Item
- Item Status
- Language Detail
- Master Note
- Product Line
- Reason Code
- Site
- Site Security
- State
- UM Conversion

Customer Management Features

The Anacapa release includes Sales Order, Sales Order Credit, and Salesperson functions, where you can create and modify sales orders, sales order credit settings, and salespersons.

Additionally, the following browses are included:

Sales

- Sales Order Detail
- Sales Order Price
- Orders Not Shipped On Time In Full
- Lines Not Shipped On Time In Full
- Overdue Orders
- Sales Order Gross Margin
- Sales Orders To Ship
- Customer Scheduled Orders
- Customer Schedule Pricing
- Required Ship Schedule
- Customer Ship Schedule
- Customer Ship Schedule Variance
- Sales Quote Detail
- Sales Quote Price
- Sales Quote Gross Margin
- Quotes Not Converted To Orders

Sales Management

- Invoice History
- Sales by Customer
- Sales by Customer/Item
- Customer Order Periods
- Trailer Codes
- Pre-Shipper/Shipper
- Price List
- Volume Discounts
- Customer Item
- Sales by Item
- Salesperson Assignment
- Commission Detail
- Sales by Salesperson
- Salesperson Quote Achievement
- Reserved Locations
- Customer Invoices
- Analysis Codes

Manufacturing Features

The Anacapa release includes Inventory browses, including:

- Consignment Inventory Usage
- Inventory Detail by Item
- Item Replacement Up/Cross Sell
- Stock Availability
- Book Transactions

Supply Chain Features

The Anacapa release includes Requisition Approval and Requisition Line functions, along with the following browses:

- Purchase Order
- Blanket Order
- Supplier Item
- Supplier Performance Data
- Supplier Schedule

Note For the Anacapa release, you use the QAD .NET UI to set up users as requisition approvers (for example, use Vertical Approver Maintenance) and to create requisitions (using Requisition Maintenance).