QAD Adaptive Applications 2019 Combined Release Notes

October 2019

The September 2019 release of QAD Adaptive Applications includes new features and fixes in Enterprise Edition, as well as releases of several QAD add-on products.

Note 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.

This document compiles Release Notes from Enterprise Edition and the add-on products.

For the latest documentation on QAD products, see the Document Library:

http://documentlibrary.qad.com

The library includes historical release notes from earlier versions.

Release notes are included for the following products:

QAD Enterprise Edition 2019

QAD Enterprise Edition 2019 includes product changes made between June 20, 2018, and July 1, 2019.

This release contains new features and enhancements as well as fixes that resulted from maintenance activities. For detailed information about individual fixes, see the Product Changes Dashboard under the Product Changes area on QAD's Online Support Center:

http://tools.qad.com/product_changes/

The Release Notes describe changes in the following areas:

- Financials Enhancements
- Internationalization Enhancements
- Manufacturing/Supply Chain Enhancements
- Installation and Conversion Updates

Note QAD Enterprise Edition is supported by the latest releases of the QAD .NET UI.

Because of the new product direction that began with the development of Enterprise Edition several years ago, some features that existed in earlier versions of the core application are no longer available. See "Additional System Changes and Limitations" on page 6 for information.

Financials Enhancements

Daybook Summarization Maintenance

You can use Daybook Summarization Maintenance (25.8.6) to set the level of operational transaction summarization at daybook level. First, select a range of daybooks. Next, specify if you want to update all the daybooks in the range on this page or whether you want to specify the level of summarization at daybook level. The next page enables you to set a summarization level at daybook level. For the changes in this program to take effect, Summarized Journal must be selected in Inventory Accounting Control (36.9.2).

AP/AR Chronological Numbering Check

In the prior release, Chronological Invoice Numbering was a standard field in the Invoice Numbering tab of Domain Modify (36.1.1.1.2) that was effective for both supplier and customer invoices. Now, there are two separate options:

- AR Chronological Invoice Numbering
- AP Chronological Invoice Numbering

These fields allow you to turn chronological invoice numbering on or off for supplier invoices and customer invoices independently. For example, select "Error on Non Chronological Number" to display an error when an invoice is created with a posting date earlier than an already existing supplier or customer invoice in the same daybook. Select "Warning on Non Chronological Number" to display a warning rather than an error.

Multiple Control Accounts

Use the Control Account field in Customer Create (27.20.1.1) and Supplier Create (28.20.1.1) to update the default account in the Control GL Profile for invoices or credit notes. The CI and SI Posting tabs display the account updated in the Control Account field. This field is hidden by default but can be added

using design mode. If the Control Account field is blank, the default account will be used for generating the posting. Only customer or supplier control account types can be entered in the Control Account field. Postings for the invoice use the control account entered here instead of the control account determined from the profile stored on the customer or supplier record. The Control Account feature is supported for all types of invoices except:

- Finance Charge
- Prepayment
- Adjustment types of invoices

Paying Suspended/Delayed Taxes

This report shows the invoices subject to suspended/delayed tax, payments, and the resulting movements from suspended/delayed tax accounts to the final tax accounts. Two new tables have been added to the schema; one for storing data related to suspended tax and the other for delayed tax.

Split Payments

It has always been possible in QAD EE to pay an invoice partially to different supplier bank accounts, using different own bank accounts. However, in some countries there is a legal requirement to pay the tax amount to a regulated bank account. This is an account under control by both the supplier and the tax authorities. You can now:

- Mark a supplier as subject to split payments.
- Indicate that a bank account is regulated.
- Automatically split the payment into the base amount and the tax amount upon invoice creation. The tax amount needs to be paid from an own regulated bank account to the regulated bank account of the supplier.

GL Transactions By Account Report

The GL Transactions by Account report now displays amounts in all currencies.

Revenue Recognition Updates

When creating a revenue contract, the Version Valid from field enables you to choose any valid date. However, when modifying a revenue contract the Version Valid from field is now a list that displays all versions of the contract. Also, when you modify an existing contract and you click Save, a window is displayed with the proposed version date. You can edit the date, subject to certain validations.

In Revenue Contract Opening Balance (37.1.25), the Delete field in the grid now enables you to delete an opening balance, as long as revenue calculation has not run on the contract.

Internationalization Enhancements

Withholding Tax

Use Withholding Tax Modify (29.15.8) to modify withholding tax records. The menu initially displays a browse with tax records. For a tax record to be displayed, the user must have access to the entity containing the tax record, and the entity must belong to the same domain from which you run Withholding Tax Modify.

When you select a WHT record, a modify screen is displayed where you can edit two fields: Additional WHT Number and Remarks. Withholding Tax View (29.15.9) displays the same fields as Withholding Tax Modify, with all fields being read-only.

These menus are license controlled and available for Thailand licenses.

ERS Control

Two new fields have been added to ERS Control (28.10.24):

- Use the ERS Invoice Create Option field to stop the ERS Processor from creating invoices when the PO Header site does not belong to the current entity (the entity where the ERS Processor is run). Enter "2" in this field to stop the invoices from being created. Enter "1" in this field for the ERS Processor to continue creating these invoices. This functionality covers the legal requirement in some countries, such as Brazil, where Intercompany postings are not accepted in supplier invoices. The invoice needs to be created in the entity that raised the PO or incurs the costs.
- When you select the ERS Receipt Based Invoicing field, supplier invoices are created with Posting Date matching the Effective Date in Purchase Order Receipts (5.13.1).

Manufacturing/Supply Chain Enhancements

Periodic Costing Statutory Currency

Periodic Costing now supports the use of statutory currency.

Note You specify the use of statutory currency for a domain in QAD Financials; see *QAD Financials User Guide* for more information.

When statutory currency is enabled for the domain, the system now prompts you to enter the name of the Statutory cost set in the following programs:

- Periodic Costing Initialize (30.5.1.23)

  You have the option of entering a current cost set, standard cost set, or simulation cost set when you enter a statutory cost set. When you do not have statutory currency in use, the system does not prompt you to enter the statutory cost set name and defaults the base currency cost set name. The base or statutory cost set is used as the basis for costs when you begin to use Periodic Costing.

- PC Work Center Rate Maintenance (30.5.3.1)

  When you specify that the system use statutory currency, Periodic Costing calculates, stores, and reports item costs in base and in statutory currencies, if defined, for each period.

  You can enter a statutory currency cost set in this program by entering the name in the Cost Set field. When you enter a statutory currency cost set, the system maintains labor and burden rates or total amounts for labor and burden for each periodic cost period in statutory currency when Periodic Costing is enabled in Periodic Costing Control.

  Note When you enter a statutory cost set, you must enter both base and statutory rates. When you enter a base cost set, you only enter base rates.

- PC Adjustment Menu (30.5.5) Programs

  You can now specify a statutory currency in Unit Cost Adjustment (30.5.5.1), PC Total Cost Adjustment (30.5.5.2), WO Component Cost Adjustment (30.5.5.13), and WO Operations Adjustment (30.5.5.14).

  When statutory currency is enabled for the domain, the system now prompts you to specify statutory currency in these programs. Once you specify the currency, the currency type cost set displays in the

adjustment programs. When you do not have statutory currency in use, the system does not prompt you to select statutory currency and defaults base currency as the selection; then the base currency cost set displays in this program.

The system validates accounts, supporting either the base or statutory currency, based on your selection of the currency type. Amounts are saved as either base or statutory fields within system internal tables.

Serialization

The following enhancements have been made to the Serialization functionality in 2019 EE:

- Serialization Control (3.17.24)

  The Activate Allocation/Picking for Serialization panel, which contains two new fields (Ship From and Active), has been added to Serialization Control (3.17.24). This panel allows users to define if serialization is activated for the shipping process, either for the whole domain or for specific sites. When using Picklist/Pre-Shipper Automatic (7.9.1), the settings in this panel determine whether detail allocations are processed traditionally (directly picked) or if they are processed with serialization (detail allocated only). When serialization is enabled, picking is done using the specific Picking/Pack Build functions.

  For example, users can determine that only a few specified sites will have the serialized shipping process activated while all other sites will process allocations traditionally. This allows customers who are new to serialization to use serialization gradually, by site instead of by domain. Conversely, users can also determine that only a few sites will process allocations traditionally while all other sites will have the serialized shipping process activated.

- The Address field was added to the following programs to give users the ability to generate specific serial ID ranges based on a specific ship-to/sold-to address:
  - Pack Create by Production Line (18.22.7.1)
  - Pack Create by Work Orders (16.15.2)
  - Pack Split (3.17.16)

  Previously, if a user needed to print labels for a specific production order, there was no direct link from the label to the sales order or to the sold-to/ship-to for the production order. Now, if the destination is known and the customer expects customer-specific labels using a custom-specific serial ID range, users can select the specific address code to ensure that serial IDs get generated for the desired serial ID range.

  Another use case is the need to have different serial ID ranges by production line. For example, some production lines were integrated with an MES system where the serial IDs were imported, while for other lines, internally generated serial IDs were used. By defining the production line codes as addresses, users can now enter a specific address code, which refers to the production line, to generate production line specific serial IDs.

  Another use case is when goods are picked for a specific SO Pre-Shipper. When the quantities to pick are smaller than a pack size, a user can perform a pack split or repack transaction to generate a new pack for the exact quantity to pick. Previously, that transaction was not related to that specific SO Pre-Shipper. Now, when using the Pack Split transaction during the picking process, users can enter a specific address code to generate a specific serial ID based on the ship-to/sold-to address. This ensures that the serial ID range that is used is specific for this sold-to/ship-to.

Other Manufacturing/Supply Chain Enhancements

Schedule Comparative Enhancements

Supplier and Customer Schedule Comparative programs were enhanced with new colors that display when plan and ship variance percentages exceed the threshold. Exceeding the variance percentage now triggers the following color changes as per the requirement quantity for the date:

- Pink: This color highlights a critical out-of-tolerance condition. The % change between the current value and the value from the same date on the previous release is greater than the Variance %.
- Yellow: This color highlights a warning out-of-tolerance condition. The -% change between the current value and the value from the same date on the previous release is greater than the Variance %.
- Red: This color indicates an out-of-tolerance condition.

The new colors display in both .NET UI Supplier Schedule Comparative Extract, Schedule Comparative Extract, and Schedule Comparative (7.5.11) and Web UI Supplier Schedule Comparative and Customer Schedule Comparative.

Installation and Conversion Updates

- QAD Enterprise Edition 2019 requires OpenEdge 11.7.4 and YAB 1.9.
- QAD Enterprise Edition 2019 installations are limited to RedHat and CentOS operating systems. See the Compatibility Guide on the QAD Store for more details on supported operating systems:

  https://store.qad.com/content/compatibility-guide
- QAD Financials is now distributed as an application, enterprise-financials-app. This enhancement consolidates the individual packages that comprise a Financials release into one file, which makes installations more straightforward and less prone to error due to keyboarding mistakes.

Additional System Changes and Limitations

At this point in the Enterprise Edition product development cycle, differences with earlier releases as well as limitations exist in various areas:

- Not all optional modules and complementary products can be used with the current version. Some of these modules are planned to be available; others may be replaced by a different type of offering.
- Some limitations exist related to technical components such as databases and operating systems.
- Some specific application features that were available in previous releases of the core application are no longer available. In some cases this is intentional; in other cases, plans exist to reimplement the features.
- QAD Financials introduces many new capabilities as well as new Financial concepts. Due to differences in concepts with Standard Edition Financials, a clear function-by-function comparison is not always possible. Certain specific functions of Standard Edition Financials might work differently or not be supported in Enterprise Financials.

Updated Policy Regarding Source Code

Source code licenses for QAD Enterprise Edition are available on a module-by-module basis and priced separately. However, even for customers who do not purchase source code licenses, QAD has historically made a subset of source available. This includes source for frequently modified reports and inquiries, and excluded transactional programs.

The list of files supplied as part of this free subset of source has changed since Standard Edition. QAD is maintaining the policy of allowing modification of reports and inquiries, but is now applying a stricter criteria to qualify what programs can be modified without purchasing source. As a result of this change, customers may notice that some programs they received in previous releases are no longer available. For example, QAD previously provided *all* include (`.i`) files—including those not used by reports and inquiries. Delivery is now limited to `.i` files that are needed by reports and inquiries; for example, frame definitions.

Another change in source code involves Financial source code. The new QAD Financials follows a different development model, and customization of source is facilitated through a customization layer that does not require direct update to the generated source code. Therefore, source for Financials programs is not available for purchase by customers. A small subset of traditional Financial programs that still remain in the Accounts Payable (AP), Multiple Currency (MC), and General Ledger (GL) modules have been moved to the base (OS) module and are available to customers who purchase source for that module.

Windows GUI User Interface No Longer Supported

The Windows Graphical User Interface (GUI) is no longer supported at all. Some programs can only be run in .NET UI; many operational programs can still be run in character, but the full use of the suite requires .NET UI.

Progress Results Files

In QAD Enterprised Edition, a full set of Progress Results files (`.qc` and `.qc7` files) is not provided because customer requirements for reporting vary extensively. Instead, a sample set is provided on the media containing five valid relationships. Users can add more relationships using the Progress Results application to fit their business needs. Refer to the Progress Results documentation or contact QAD Global Services for assistance with adding relationships to the existing QC files.

Support for Optional Modules and Complementary Products

Optional Modules Not Supported in QAD Enterprise Edition

Project Realization Management (PRM)

PRM was removed from the product. It may be restored at a later time pending product management decision regarding enhancing PRM or using another project management solution.

Centralized Order Processing (not planned)

Centralized Order Processing (COP) is not supported in the product, either for sales or purchase orders. Other order management features can be used.

This means that you cannot enter an SO or PO in one domain and process the SO shipment or PO receipt in another domain. However, you can open an SO or PO with the header site belonging to one entity and the line sites belonging to different entities in the same domain. In this scenario, the appropriate cross-company postings are registered.

You can also use Enterprise Material Transfer for cross-domain sourcing of items. QAD Enterprise Edition features enhancements to the EMT functionality that make this method easier to use.

Complementary Products Not Supported in QAD Enterprise Edition

- QAD Manufacturing Execution Workbench (MEW) (unplanned)
- QAD Distributed Order Management (DOM) (unplanned)
- Trade Management (TrM) and APM Medical (unplanned)
- The Planner (unplanned)
- Multi-Level Pegging (unplanned)
- Q/LinQ and DataSync. The features of both these products are now included in QXtend.

Installation and Conversion Limitations

Installation

Service pack only media are not provided. Each release is a full install, although database upgrade utilities are provided.

Conversions

To ensure the highest level of quality and success for customers converting to the QAD Enterprise Edition 2019 release, the participation of QAD or certified QAD partner services is strongly recommended. As a result, the conversions are disabled on the release media to ensure conversion requirements are properly reviewed and planned by QAD prior to any conversion activities.

Operating Systems and Platforms

Support for an Oracle database is not generally available; only Progress database can be used.

Note An Oracle version is available for Early Adopters only.

Performance Tuning

Please consult with QAD prior to implementing a Wide Area Network configuration.

General Limitations

Multiple Databases Not Fully Supported

YAB does not currently support the installation of multiple databases. In addition, the application is limited in the support for multiple databases.

Because of the use of proxies through an App Server to update financial tables, you cannot switch databases if any activity may update financial tables. Currently, this means that a user cannot connect to another database from the UI. The only switching that is allowed is from the low-level DRP and EMT routines where it is known that the resulting updates do not affect financial data.

EMT itself works correctly in both single (cross-domain) and multiple database implementations. When using multiple databases, users must separately log in to the databases; it is not possible to switch between databases from the menu.

GL consolidation between multiple databases is not fully supported.

Some Financial Utilities Not Available

Delete/archive utilities are planned. Other utilities will be created as needed.

Handling of Euro Conversion Deferred

The programs for converting a currency to the Euro have not been updated to work with the Enterprise Financials. This will be addressed when a need for such conversion exists.

Financial Source Not Available

Since QAD Financials uses a new component-based methodology, they cannot be modified in the way traditional MFG/PRO programs were customized. Source code for the financial modules is no longer provided. Customization templates can be used to add business logic to existing Financial programs without making invasive code changes. Documentation of the source code required for creating APIs is supplied in HTML format. Customization features will be expanded in future releases to support additional features such as including new tables or new components.

System Cross-Reference Not Available

Earlier versions of QAD ERP applications provided a system cross-reference that let you see where tables, fields, and programs were referenced. This feature is no longer available, since it did not apply to the new component architecture.

Internationalization Features

Support for country-specific requirements is being addressed in each release of QAD Enterprise Edition. Many of these features that were previously provided as localization or partner offerings are now being provided as generic features of the product.

For a complete list of internationalization features and planned country support, see the QAD Support Web site.

QAD Automation Solutions: Data Collection 3.2

QAD Data Collection Version: 3.2

QAD Enterprise Edition: 2015 Enterprise Edition and higher

Release Date: September 2019

Prerequisites: For information about compatibility and prerequisites, see the *QAD Automation Solutions: Data Collection Installation Guide v3.2*.

User Guide: *QAD Automations Solutions: Data Collection User Guide v3.2*

Installation Information: Installation information is included in the *QAD Automation Solutions: Data Collection Installation Guide v3.2*.

Entity Diagrams: Entity Diagrams for QAD Automation Solutions: Data Collection are included in the *QAD Entity Diagrams Technical Reference Guide*.

Enhancements

The following enhancements have been made to QAD Automation Solutions: Data Collection.

- Added the Where Program is Used Report (6.20.15), which identifies from where within a transaction a program is called.
- Added the Where Dataset is Used Report (6.20.16), which identifies all transactions referencing the datasets specified in the search conditions.
- Added the Where Transaction is Used Report (6.20.17), which identifies where a transaction is referenced.
- Added the Dataset Changes (6.20.18) report, which identifies what has changed in a dataset.
- Added the Update Specific Field Format action, located in Transaction Definition Maintenance (6.16), which allows the user to update the format of a specific field within a transaction.

Fixes

You can find a list of fixes that apply to this version by visiting the www.qad.com site. You should have a valid QAD login to enter the site. From there, you select Support > Store > Product Changes > Automation Solutions > [DC version]. Or, you can use the following URL:

https://tools.qad.com/product_changes/index.php

QAD Automation Solutions: Label Printing Services 3.2

Label Printing Services Version: 3.2

QAD Enterprise Edition: 2015 Enterprise Edition and higher

Release Date: September 2019

Prerequisites: Refer to the *QAD Label Printing Services Installation Guide,* version 3.2, dated September 2019 for information on compatibility and prerequisites.

Conversion Information: Conversion information is included in the *QAD Label Printing Services Installation Guide,* version 3.2, for September 2019.

User Information: User information is included in the *QAD Label Printing Services User Guide,* version 3.2, dated September 2019.

Entity Diagrams: Entity diagrams for Automation Solutions: Label Printing Services are included in the *QAD Entity Diagrams Technical Reference,* for September 2019.

Enhancements

The following topics introduce enhancements for this release.

For detailed information on the enhancement, find this version of Label Printing Services at the product change page at the QAD Store. To find the store, visit the www.qad.com site; then, log in with a valid QAD login. From there, you select Support > Store > Product Changes > Automation Solutions > [LPS version]. Or, you can use the following URL:

https://tools.qad.com/product_changes/index.php

The enhancements introduced below are also documented in more detail in the 3.2 version of the *QAD Label Printing Services User Guide*.

New Utility to Delete Stranded Label Work File Records

A new Remove Stranded Label Work File Records (36.13.16.4.14) was added in this release. Use the utility to delete stranded label event work flow records (lbevntwkfl records). The system creates these records when processing labels and typically deletes them once the label is processed; however, occasionally, they are not successfully removed from the system. You can run this utility in simulation mode only to review the records the system intends to delete. You can also run it in batch mode. The system prompts you to enter a date that the system uses as a stopping point when deleting records; the system deletes records up to the date you specify.

The system creates an archive file when you run the utility in simulation mode and when you actually delete the records. Refer to the Set Up chapter of the *QAD Label Printing Service User Guide* for more information on the utility.

Copy an Existing Label Content Routing Setup or Configuration

You can now copy an existing label content routing setup or configuration record to a new label content routing setup or configuration record.

To copy an existing label content routing setup, in Label Content Routing Setup (36.13.16.1.15), select the Copy Setup option from the Action drop-down menu. The system displays a screen with fields that prompt for additional information for the new record.

To copy an existing label content routing configuration, in Label Content Routing Config (36.13.16.1.16), select the Copy Config option from the Action drop-down menu. The system displays a screen with fields that prompt for additional information for the new record.

Refer to information in the Set Up chapter of the *QAD Label Printing Service User Guide* for more information.

Copy an Existing Label Printer Routing Setup or Configuration

You can now copy an existing label printer routing setup or configuration definitions to a new label printer routing setup or configuration definition.

To copy an existing label printer routing setup, in Label Printing Routing Setup (36.13.16.1.17), select the Copy Setup option from the Action drop-down menu. The system displays a screen with fields that prompt for additional information for the new record. W

To copy an existing label printer routing configuration, in Label Printing Routing Config (36.13.16.1.18), select the Copy Config option from the Action drop-down menu. The system displays a screen with fields that prompt for additional information for the new record.

Refer to information in the Set Up chapter of the *QAD Label Printing Service User Guide* for more information.

Copy Label Formats

You can now copy an existing label format definition in Label Format Maintenance (36.13.16.1.9) and name the copy to a new label format definition. You select Copy Label Format from the drop-down menu from the Action option to access the function.

The copy function is available when the following fields are enables:

- Active
- Label Desc
- Track
- Delete Labels before month
- Generate Files
- Tokens

Refer to information in the Set Up chapter of the *QAD Label Printing Service User Guide* for more information.

Fixes

You can find a list of fixes that apply to this version by visiting the www.qad.com site. You should have a valid QAD login to enter the site. From there, you select Support > Store > Product Changes > Automation Solutions > [LPS version]. Or, you can use the following URL:

https://tools.qad.com/product_changes/index.php

QAD Configurator 5.11

QAD Configurator Version: 5.11

Release Date: September 2019

QAD Product Suite Compatibility: 2014 SE, 2015 EE to 2019 EE

New and Changed Features

Configuration Rebuild Enhancements

The following rules are executed correctly during a Configuration Rebuild so that the Price of the new generated Variant Item can be accurate:

- General Sales Configuration Rules linked to Configurable Item
- General Sales Configuration Rules linked to Rule Group
- Item Specific Sales Configuration Rules
- Item Specific Sales Configuration Rules linked to Rule Group
- General Rule Tables Rules
- Item Specific Rule Table Rules
- Pricing Part Rules on Feature Level
- Pricing Part Rules on Option Level

Fixes

Issue Number	Fixes
CFG-1971	Configuration Questionnaire now correctly shows the Price for an independent Feature based on the Pricing Part attached to it, although the Feature/Question is not answered when the flag “Pricing on Feature level” is set as True and a non-blank Pricing Part is attached to it.
CFG-1972	Previously in Questionnaire launched from CSS, the price calculation switch was not working. This issue has been fixed.
CFG-1980	Previously when launching menu items from the .Net UI client, an error would appear. This issue has been resolved.
CFG-1989	Previously, Sales Rules were not executed during rebuild so that pricing could not be correctly done. This issue has been fixed.
CFGS-424	Configuration Questionnaire now correctly retains the setting of the “Show all options of feature” flag in the Customize frame until it is specifically changed, when creating a new variant. Previously, this did not occur.
CFGS-428	Configuration Rebuild now correctly executes the External Entity rules when creating a variant having External Entity Rules defined for the Item-Site planning record in External Entity Rule Maintenance.
CFGS-430	Configuration Questionnaire now correctly creates the price lists for the top-level variant item, when the Configuration Questionnaire is run for a Configurable Item that contains a lower-level Configurable Item for which the flag Calculate Configuration Price is enabled or List Price variable and Net Price variable are set for lower-level Configurable Item in Configurable Item Maintenance. Previously, in the above scenario, the price list of the top-level variant item was incorrect.
CFGS-431	Configuration Questionnaire now correctly shows the Print icon when Configuration Questionnaire is started using Customer Self Service (CSS) in the IE 11 browser.
CFGS-441	In Configurator with SE, Configuration Questionnaire no longer overwrites Item-Site planning data in Item-Site Planning Maintenance (pppsmt02.p), when an already existing variant is selected in the questionnaire.
CFGS-442	Configuration Questionnaire now correctly enables Feature Option Price for a feature when the feature it is dependent on is answered

Issue Number	Fixes
CFGS-444	Configuration Questionnaire now correctly replaces the Variable/Feature placeholders within the routing comments in Routing Maintenance (rwromt.p) with the value from the Configuration Questionnaire when the Variable/Feature is defined as an extent.
CFGS-445	Variable Maintenance now correctly forces re-analyze of the Configurable item, when Questionnaire is executed after modifying the fields in the Data Format tab for variable of type Element.
CFGS-455	Configuration Questionnaire no longer fails the Feature Browse validation when Questionnaire enables the browse and a valid answer is selected, although the user has no permission to run the linked browser as set in Role Permissions Maintenance.
CFGS-463	Configuration Questionnaire now correctly creates variants when working with OE 10.2.b QAD 2014SE Configurator 5.10.1 environment.
CFGS-470	Configuration Questionnaire no longer displays the progress error "** Input Value: should be yes/no. (87)" when the configuration analyzer is run from the questionnaire for the configurable item and the logical feature is defined as a dependent feature in the Item-Rule Maintenance while launching the questionnaire.
CFGS-471	Configuration Questionnaire now correctly answers all the dependent features with the default value when the Answer All button is clicked for the first time when multiple dependent rules are defined to set a feature.
CFGS-482	Cross Validation Analyzer report no longer displays Progress messages to indicate ambiguous fields when using custom function for cost rollup.
CFGS-483	Configuration Rebuild now correctly retains the setting of the Purchase/Manufacture field of an existing Variant Item when rebuilding it.
CFGS-490	Configuration Rebuild now correctly checks syntax, when Check Syntax is executed in the RebuildPopupForm and the entered statement in the Advanced Value is correct.
CFGS-498	Configuration Rebuild no longer fails, when a custom function is entered in the Advanced Value section of the RebuildPopupForm frame and Check Syntax is executed.
CFGS-502	Now, after the back arrow has been clicked twice, the Questionnaire rule can be executed appropriately. Previously, this did not occur.
CFGS-503	Variable Maintenance now correctly leads to a forced re-analyze of the Configurable item in the Configuration Questionnaire when the Pricing Part of the variable options is modified and the variable is attached to the item feature in Feature Maintenance with Std Option set to Yes.
CFGS-506	Configuration Rebuild now correctly creates planning Item Data when selecting and rebuilding multiple Configurations/Variant Items and Product Structure/Routing is checked.
CFGS-507	Configuration Rebuild now correctly show the progress of the rebuild in percentages in the "Rebuild in process" pop-up, when the configuration rebuild is executed.
CFGS-513	Configuration Questionnaire no longer display the value of datatype Numeric/Date as [0.00] in Questionnaire when no Pricing Part or Pricing Part Rule is attached to Feature/Variable.

QAD Customer Self Service 5.6

QAD CSS Version: 5.6

Release Date: September 2019

QAD Product Suite Compatibility: 2014 SE, 2015 EE to 2019 EE

Fixes

Issue Number	Fixes
CCS-863	Previously, when creating an item with a photo, the system hung without notice. This issue has been fixed.
CCS-684	Previously, the submission of shopping cart and confirm sales order was fairly slow because of the unnecessary full buffer-table. This performance has been enhanced.
CSSS-134	Previously, when a user double-clicked the Submit Order button, an error page would display. This issue has been fixed.
CSSS-135	Previously, with the Customer Invoice Numbering feature enabled, CSS's customer credit report would incorrectly display Finance invoice number instead of operational invoice number. This issue has been fixed.
CSSS-141	Previously, the admin report download button stopped working. This button now works as intended.
CSSS-142	Previously, even if the user clicked Accept after submitting an order, an error page appeared. This issue has been fixed.
CSSS-147	Previously, incorrect customer items were created in QAD ERP when being submitted from CSS. This issue has been fixed.

QAD Mobile Field Service 3.9

QAD Mobile Field Service Version: 3.9

Release Date: September 2018

QAD ERP Compatibility: 2012 EE, 2013.1 EE, 2014 EE, 2014 SE, 2015 EE, 2016 EE, 2017 EE, 2018 EE

QXtend Compatibility: 1.7 or later

Languages: Chinese (Simplified and Traditional), Czech, Dutch, English, French, German, Italian, Japanese, Korean, Polish, Portuguese, Spanish (Castilian and Latin American)

Fixed Issue

Internal ID	Description
MFS-488	Previously, the Status fields in the Completion panel allowed users to input characters. Now, the field value can only be selected from the drop-down list.
MFS-492	Previously, when the Document Attachment Application had the webdav type defined for the mfg user, the FSR reports were not attached to the Call Maintenance and Call Activity Reports. This issue has been fixed.
MFGS-9404	Previously, the value for the Engineer Name field was blank in FSR. Now, the field is rendered correctly.

QAD Production Orders 3.1

QAD Production Orders Version: 3.1

QAD Planning and Scheduling Workbenches Version: 4.3

Production Order Enhancements

Phantom Usage

The phantom use-up logic is now available in this release. It applies to global phantom items whose Allocation Policy is set to Detail.

The phantom use-up logic first allocates and consumes available inventory for the phantom item. It then explodes the remaining requirements to the phantom's components.

This feature applies to the following programs:

- Production Order Maintenance (16.3.1)
- Production Order Split (16.3.11)
- Production Order Bill Maint (16.3.4)
- Production Order Allocate (16.5.1)
- Prod Order Manual Allocation (16.5.2)
- Bulk Item Picklist Calculate (16.5.3)
- Production Picklist Pick (16.5.7)
- Production Picklist Transfer (16.5.9)
- Operation Activity Transaction (16.13.13)
- Production Order Receipt (16.13.1)
- Production Order Picklist Issue (16.5.11)

For details about usage of phantom items and phantom use-up logic, refer to the *QAD Production Orders User Guide*.

Support for Routable Production Orders

You can set the Pur/Mfg code for an item to Routable in Item Master Maintenance (1.4.1) or Item Planning Maintenance (1.4.7).

When routable components are included in a production order bill, the system automatically creates production orders for the routable components once the parent order is allocated or released.

Routable production orders can be allocated, released, and used for processing component issues, inventory receipts, and shop floor control transactions.

This new feature affects the Planning and Scheduling Workbenches (MSW/PSW) and the following programs:

- Production Order Maintenance (16.3.1)
- Multiple Order Status Change (16.4.3)
- Production Order Allocate (16.5.1)
- Bulk Item Picklist Calculate (16.5.3)

- Production Order Release/Print (16.4.2)

Enhanced Production Order Release/Print

Production Order Release/Print (16.4.2) has been enhanced, allowing you to re-print order sheets or picklists for released orders.

A new filter, Print Bar Code, has been added. This enables you to print the production order ID and operation number in bar code format.

In this program, you now have options to:

- Print the production order sheet.
- Release the order along with a printed shop paper.
- Calculate a picklist.
- Print a picklist.
- Print shortage tags.
- Dispatch the shop paper along with any picked materials to the shop floor.
- Print the production order ID and operation number in bar code format.

If released production orders are included, the system does not release such orders again, but supports all the other functions such as reprinting order sheets or picklists.

If you set Print Bar Code to Yes, the production order ID and operation number are printed in bar code format with the alphabetic codes beside it. If this field is set to No, only the alphabetic codes print.

Calendar Considerations

The system can now take production line calendars and exception settings into account:

- When you create a production order, the system uses the manufacturing lead time to calculate the due date starting from today by default. If there is a primary production line defined for the item on the order site, the primary production line calendar takes precedence over the other kinds of calendars, and should be used first.
- When no routing scheduling logic is involved and the production line is assigned, if you leave the release date or due date blank, the system uses the specified production line calendar first.

The calendar priorities in such scenarios are listed in descending order as follows:

- Production Line Calendar
- Site Calendar
- Domain Calendar

Support for Planned Orders in Certain Reports

The option P (Planned) is now available for the Order Status field in the following programs:

- Production Order Release/Print (16.4.2)
- Production Order Allocate (16.5.1)
- Bulk Item Picklist Calculation (16.5.3)

If you leave the Order Status field blank or set it to P, planned orders are included in the generated report.

Updated Options for the Include WO/Rep/Both Field

The WO option for the Include WO/Rep/Both field has been renamed Discrete.

The Include WO/Rep/Both field now contains the following options:

- Both
- Repetitive
- Discrete

This update applies to the following programs:

- Production Order Release/Print (16.4.2)
- Production Order Allocate (16.5.1)
- Bulk Item Picklist Calculation (16.5.3)

Restructured Prod Order Accounting Close to Support QRF Version

The production order number is added to some temporary tables, so that Prod Order Accounting Close (16.20.10) works properly.

Added QRF Versions for Multiple Order Status Change and Post Production Order Usage Variances

The QRF report Multiple Order Status Change (16.4.25) has been added. In this release, the CHUI report (16.4.3) and the QRF report (16.4.25) co-exist for Multiple Order Status Change.

You can use Multiple Order Status Change to update the status of multiple production orders in batches.

Post Rep Accum Usage Variances has been renamed Post Production Order Usage Variances (16.20.7).

Post Production Order Usage Variances shares the function of calculating usage variances as Production Order Accounting Close does, and makes sure that variances are not posted repeatedly.

Enhanced Support for Negative Backflush of Components

The system supports negative backflush of components.

If there is no backflush location or production reserved location defined for components, the system returns the inventory of components back to the primary location of the item during negative backflush processing.

This new feature affects the following programs:

- Operation Activity Transaction (16.13.13)
- Production Order Receipt (16.13.1)
- Purchase Order Receipt (5.13.1)
- PO Shipper Receipt (5.13.20)
- Purchase Order Returns (5.13.7)
- Components reverse when Zero Balance WIP is Yes

Production Order GL Details Report (16.20.28)

A new report, Production Order GL Details (16.20.28), has been added. This allows you to view a report about the GL details of a production order.

Using this report, you can view all GL transactions posted for a production order. Each GL transaction related to an order is displayed with Debit and Credit accounts shown as two separate lines in the output. Debit values are positive while Credit values are negative.

You can check the differences and see whether all GL transactions are recorded correctly. You can also export the report to an Excel file for further analysis.

Production Order Split Enhancement

The system allows you to create a discrete production order with Quantity to Complete or Quantity to Start set to 0 (zero). During order splitting, however, Quantity to Complete or Quantity to Start cannot be 0 (zero). Therefore, when splitting an order, whose Quantity to Complete or Quantity to Start is set to 0, the system displays error messages like the following:

- Quantity to Start cannot be zero.
- Quantity to Complete cannot be zero.

In addition, when a production order is split into schedule orders A and B, the system also displays an error message if Quantity to Complete or Quantity to Start of order A or order B is 0.

Zero Not Allowed for Quantity to Start in Repetitive Orders

When you create a repetitive order using Production Order Maintenance (16.3.1), the value of Quantity to Start cannot be 0 (zero).

Support for Routable Items During Planned Order Approval

A new filter criterion, Include Routable Items, has been added to Planned Production Ord Approval (23.10) and Planned Purchase Order Approval (23.11).

This field determines whether planned orders for routable items are to be included during planned order approval.

If this field is set to Yes, the planned orders for routable items (Pur/Mfg code = Routable) are displayed and can be approved as production orders or purchase requisitions.

New Reports Added

The following reports have been added to this release:

- Production Order Routing Report (16.3.28): allows you to view routing details by production order.
- Efficiency by Production Order Report (16.13.20.26): allows you to view routing efficiencies by production order.
- Operations by Production Order (16.13.20.27): allows you to view operation details by production order.

Enhanced Rebuild 'mrp_det' Table

The system calculates the open quantity on a production order based on the Open Quantity Method setting defined in Production Order Control (16.3.24):

- When Open Quantity Method is set to QtyComp:

  Open quantity on a production order = Quantity to Complete - Completed Quantity

- When Open Quantity Method is set to QtyProc:

  Open quantity on a production order = Quantity to Start - Quantity Processed

If the calculated open quantity is 0 (zero), the production order is deemed completed.

Rebuild 'mrp_det' Table (23.25.1) now no longer rebuilds MRP requirements for completed production orders.

Automatic Backflush for Lot-Controlled Items If No Detail Allocation Exists

In earlier releases, if there was insufficient allocated inventory for lot- or serial-controlled items during backflush, the system automatically displayed the component list regardless of the Modify Inventory setting.

In this release, the system displays the Component Issue frame only when Modify Inventory is selected. If there is insufficient inventory for lot-controlled items at a lot, the system displays an error message, prompting you to cancel the transaction.

Logic for Determining Backflush Component Required Quantity When Substitute Items Issued on Order

During backflush of components, different logic is used to determine the quantity required for component issuing:

- You can manually modify the component quantity required in Production Order Bill Maint to fulfill production requirements. During backflush component issuing, the system reflects the modification by using a dynamic quantity per (Component quantity required/Order quantity) to determine the quantity required for component issuing.

  If there is no substitute item issued, the quantity required for component issuing is calculated according to the following formula:

  Quantity required for component issuing = Quantity processed x Dynamic quantity per,

  Where *Dynamic quantity per = (Component quantity required/Order quantity)*

- When you process a repetitive CUM order and no schedule could be consumed, the system uses the quantity per from the standard product structure to calculate the quantity required.
- When you process a discrete CUM order and no schedule could be consumed, the system uses the quantity per in the order BOM to calculate the quantity required.
- If you have issued substitute items to replace the original components, this affects the dynamic quantity per.

  Then the quantity required for component issuing is calculated according to the following formula:

  Quantity required for component issuing = Quantity processed x Quantity per in order BOM

  A validation has also been added. If you have set up substitute item relationships, the system does not allow you to add any substitute item directly in the backflush frame.

Removed Order Status B

Beginning with this release, Production Orders does not support order status B (Batch).

Order status B was applied in earlier releases to speed up the processing of a large number of orders. In this way, the system did not create or explode bills or routings for these orders until the order status was changed from B to F, E, A, or R. Material Planning did not consider the demand for production order components when the order status was B, either. This helped the system respond to user operations swiftly.

As system performance is greatly improved in this release, status B is no longer required, and therefore has been removed to simplify user operations.

You are now not allowed to create or import production orders with status B. When you run Multiple Order Status Change, you cannot set Current Status (or Change From Status) or New Status (or To) to B. In addition, the default for Current Status (or Change From Status) is now F.

Production Order Cost Analysis (16.13.21)

A new browse, Production Order Cost Analysis (16.13.21), has been added to Production Orders 3.1.

This browse is available only in Production Orders and is not accessible in environments with Work Orders.

The Production Order Cost Analysis browse displays the cost information for each production order, such as total standard cost, total actual cost, total cost variance, standard unit cost, actual unit cost, and so on.

As a Cost Accounting Manager, you can easily analyze standard and actual costs in the browse, therefore better understanding the true costs for a production order, and where the issues may be.

Program Replacement

The following Production Order programs were removed in this release:

Table 1
Programs Removed and Replaced

Removed Program	Replaced By
Cumulative Order Delete/Archive (18.23.2 and 18.22.23.2)	Production Order Delete/Archive (16.3.50)

Production Order QDoc APIs

This table provides QDoc API information for the 3.1 version of Production Orders.

Table 2
APIs by Version

QDoc	Version 3.1	Procedure	Method Name	Menu
maintainProductionLineCalendar	ERP3_1	us/re/rescmt.p		Production Line Calendar (16.1.13.1)
allocateProductionLine	ERP3_1	us/sp/splamt.p		Production Line Allocation (16.1.6)
maintainWorkCtrReserveLoc	ERP3_1	us/rw/rwrldmt.p		Work Ctr Reserve Loc Maintenance (1.1.18.13)

QDoc	Version 3.1	Procedure	Method Name	Menu
maintainProductionOrderBill	ERP3_1	us/wo/wowamt.p		Production Order Bill Maint (16.3.4)
maintainProdLineReserveLoc	ERP3_1	us/sp/sprldmt.p		Prod Line Reserve Loc Maintenance (1.1.18.16)
maintainProductionOrderRouting	ERP3_1	us/wo/woopmt.p		Production Routing Bill Maint (16.3.6)
reportNonProductiveLaborFeedback	ERP3_1	us/re/renplfapi.p	processNonProductiveLaborFeedbackAPI	Non-productive Labor Feedback (16.13.5)

Production Orders Fixes

Table 3
Production Orders Fixes

QAD Internal Ticket ID	Description
CRMFG-19166	Previously, in an average cost repetitive order with WIP transfer, the floor stock was transferred at the last operation, instead of the operation it was linked to. This issue has been fixed.
CRMFG-19326	Prod Order Cost Variance Report (16.20.15) and WIP Valuation Report (16.13.20.4) have been removed and replaced by other reports in Production Orders. Prod Order Cost Report (16.20.27) and WIP Valuation Report as of Date Report (16.20.16) have been enhanced to report posted material costs correctly.
CRMFG-19356	When there is a production order with an operation set in a subcontract work center, if you run Production Order Allocate (16.5.1) to allocate this order with Include Subcontract Work Center set to Yes, the system takes the subcontract operation into consideration and allocates components properly.
CRMFG-19380	In a product structure, the same items in one operation may have different effective dates. During production order explosion, this kind of product structure can now be processed correctly. Such items are accumulated for component backflush or creation of production order BOM.
CRMFG-19386	During routing scheduling, if some operation transactions have been completed for an order, Open Qty of an operation is calculated by following the formula: Open Qty of an operation = Qty to Start of the operation - Run Complete (field in production order routing) - Qty Scrap - Sub Complete Note: If the value of Qty to Start, Qty Scrap, or Sub Complete is less than 0, the system takes it as 0 during calculation.
CRMFG-19389	You can change the status of a discrete production order from F to R and then back to F. If you then run Production Order Split (16.3.11) to split the order, the value in the Move In field is 0 in the WIP Queue.
CRMFG-19390	The open quantity of a scheduled order is now taken into consideration during routing scheduling. In other words, routing scheduling now does not apply if the open quantity of a scheduled order is equal to or less than 0 (zero) during production order splitting.
CRMFG-19391	Production Order Routing Maint (16.3.6) now does not allow you to delete an operation from a discrete CUM order if the operation has labor reported.
CRMFG-19399	If a production order is closed or its open quantity is less than 0 (zero), Production Order Split (16.3.11) now does not allow you to split this order and 0 is displayed in the Open Quantity field for this order.
CRMFG-19400	A discrete production order can be split into two or more scheduled orders. If you change the production line for any of the scheduled orders, you can still enter the discrete CUM order ID in Production Order Maintenance (16.3.1) or Operation Activity Transaction (16.13.13) to search for all of the scheduled orders.
CRMFG-19404	Split Cum Order Maintenance (16.3.12) does not allow you to edit the routing code or BOM/formula code for a discrete CUM order with component issuing information.

QAD Internal Ticket ID	Description
CRMFG-19405	Assume that there is a discrete production order that has been split into two or more scheduled orders. If you run Split Cum Order Maintenance (16.3.12) to change the CUM order status to C and change the BOM code and routing code as well, the BOM and routing codes of the scheduled orders are changed accordingly.
CRMFG-19426	Previously, after you added a line item with an earlier effective date in Production Order Maintenance with “Add Item to Production Line with an earlier effective date” set to Yes, the results displayed in Production Line Allocation Maint (16.1.6) were incorrect. This issue has been fixed.
CRMFG-19427	After you split a discrete order into two scheduled orders, if the open quantity of each scheduled order is 0, allocations are released for both of them.
CRMFG-19432	Previously, the Qty Allocated value shown in Inventory Detail Report (3.6.5) was incorrect after you split an order and removed some picked quantity to the picklist. This issue has been fixed. The Qty Required value is now reduced in Inventory Detail Report after you decrease the value of Qty to Start.
CRMFG-19435	You can link a production line to two line items with different Start Effective dates. If you delete the line item whose Start Effective date is earlier after conducting Production Line Allocation Maint (16.1.6), the system can now display the allocation percentage of this production line correctly.
CRMFG-19436	Previously, if a scheduled order has picked more quantity than the quantity required and then been split, and the newly generated order had a higher priority than the original order, both the total allocated quantity and picked quantity displayed were incorrect after you ran Allocated Inventory Inquiry (3.18). This issue has been fixed.
CRMFG-19438	The Qty Required value in inventory details is now updated correctly after you change the status of a discrete scheduled order from F to E, A, or R.
CRMFG-19439	An error message is now displayed if you run Production Order Component Issue (16.5.12) to issue an item that does not exist in the order BOM.
CRMFG-19440	Previously, Production Order Receipt did not record the setup time when the production order quantity was inconsistent with the order quantity maintained in Item Master. This resulted in incorrect labor setup usage variances during Prod Order Accounting Close. This issue has been fixed.
CRMFG-19442	After you run Production Order Delete/Archive (16.3.50) to delete a discrete CUM order, its discrete scheduled orders are now deleted accordingly.
CRMFG-19455	Previously, there might be an error message when Production Orders were in use and you updated the item-site inventory record. This issue has been fixed.
CRMFG-19464	Previously, after you reconfigured the pick policy and issue policy for a component, an incorrect value was displayed for Quantity Issued in Production Order Bill Maint (16.3.4). This issue has been fixed.
CRMFG-19467	When multiple users run Production Order Maintenance (16.13.1) concurrently, the system now displays an error message to indicate that this program is being used by another user.
CRMFG-19473	Production Order Receipt now correctly posts overhead costs for RCT-WO transactions where costs have overheads, and does not post MTHD CHG transactions.
CRMFG-19491	In Production Order Maintenance (16.3.1), if you clean up the release or due date for co- or by-product production orders at E status and set Adjust Co/By Order Date to No, the system fills in the release or due date with the corresponding date set in the base process production order.
CRMFG-19492	Previously, if you used Operation Activity Transaction (16.13.13) to issue a substitute item with the Substitute field selected, it resulted in a method change variance instead of a material usage variance. This issue has been fixed.
CRMFG-19500	You can create a production line with an item in a future date in Production Line Maintenance. If you then create a production order with this production line and add the preceding line item with an earlier effective date, the following fields default from the settings in Production Line Maintenance: Number of Lines, Setup Time, Duration Buffer, and Units/Hours.

QAD Internal Ticket ID	Description
CRMFG-19508	Post Rep Accum Usage Variances has been renamed Post Production Order Usage Variances (16.20.7) to post usage information for both repetitive and work orders. Post Production Order Usage Variances shares the function of calculating usage variances as Production Order Accounting Close does, and makes sure that variances are not posted repeatedly. Previously, if you reported extra labor and then ran Post Rep Accum Variances for a CUM order, the labor variance was created correctly. During accounting close, however, a labor variance was being created again for the same transaction, and a method variance was created to balance out the extra variance. This issue has been fixed, making sure that the variances are not calculated repeatedly and correct values are displayed on Production Order Cost Report.
CRMFG-19513	A picklist is updated based on the Picklist Maximum value after you increase the Qty to Start value using Production Order Maintenance.
CRMFG-19518	In Production Schedule Leveling (PSL), setup time is not calculated repeatedly for orders generated during order splitting since these orders are for manufacturing the same item.
CRMFG-19519	After leveling, production orders are sorted according to their Run Sequence values. For example, if Run Sequence of items A and B are set to 1 and 2 separately, after leveling, production orders for item A are displayed ahead of production orders for item B.
CRMFG-19534	Previously, when you used Production Order Receipt (16.13.1) for production orders with subcontract operations, the system might mistakenly process Qty Complete for such operations and components at that same operation were backflushed. This resulted in overstated Qty Complete value and components backflushed at that subcontract operation. This issue has been fixed. Production Order Receipt now calculates the labor for subcontract operations only when Auto Labor is set to Yes.
CRMFG-19540	Previously, after you ran Inventory Detail Report (3.6.5), the system might display incorrect Qty Required values for components whose Pick Policy was set to No Pick and Issue Policy set to No Issue. This issue has been fixed.
CRMFG-19546	Previously, after you increased the value of Qty to Start for a production order, the system might display incorrect Qty Allocated values. This issue has been fixed.
CRMFG-19549	In Production Order Receipt and Operation Activity Transaction API, if the process quantity is a decimal, the system displays an error message.
CRMFG-19553	The Mfg Type field has been added to Prod Order Accounting Close (16.20.10). The fields Machine, Work Center, and Account Description have been added to Post Production Order Usage Variances (16.20.7).
CRMFG-19555	The Production Orders API has been enhanced to resolve the issues detected during QMI data setup.
CRMFG-19561	The performance of the Supplier Schedule Release browse has been improved. This browse is no longer locked or takes a long time to return when there are a large number of agents are running it concurrently.
CRMFG-19584	When Zero Balance Work in Process is set to Yes in Production Order Control, the system now calculates and displays correct Qty Issued values in BOMs for repetitive CUM orders.
CRMFG-19585	The control for calculating the issue date of a component now works properly when MRP is running.
CRMFG-19591	When creating a firmed order or firming a planned order, the system now uses the longest CUM lead time to calculate the issue date for the component.
CRMFG-19602, CRMFG-19601	Previously, when you used Post Production Order Usage Variance (16.20.7) to post floor stock, incorrect values were displayed in the Qty Prev Expensed column of the generated report. The issue has been fixed.
CRMFG-19650	A record can now be successfully created after you change the domain and use Production Order Maintenance QDoc to send a request.
CRMFG-19654	After you add a component to a discrete CUM order, Qty Req of the new component in Inventory Master is now updated.
CRMFG-19655	After you create a production order with a component serving as the key item in Production Order Maintenance (16.3.1), the order quantity is kept even if there is no inventory available for the component and a key item error occurs.
CRMFG-19658	Previously, when you entered a CUM order number in the Prod Order field in Operation Activity Transaction (16.13.13), incorrect Routing and BOM values might be displayed in the header frame. In addition, an improper new CUM order was created after the transaction. This issue has been fixed.

QAD Internal Ticket ID	Description
CRMFG-19659	When the UM of a component is different from that of its substitute item, the UM of the substitute item in the Component Issue panel of Operation Activity Transaction (16.13.13) is the same as its UM set in Item Master Maintenance (1.4.1).
CRMFG-19662	Serialized inventory can now be issued in Production Order Component Issue (16.5.12).
CRMFG-19663	Previously, you could not launch Production Order Maintenance (16.3.1) after you generated a picklist by using any of the following programs: • Production Order Allocate (16.5.1) • Production Order Release/Print (16.4.2) • Bulk Item Picklist Calculation(16.5.3) This issue has been fixed.
CRMFG-19683	You can create a production order with Order Status set to E, Component Issue Date Method set to Order, and the component's Issue Date set differently from the order's Release Date. Previously, if you modified the order quantity, the component's Issue Date was then automatically changed to the order's Release Date. This issue has been fixed, and order quantity change no longer leads to issue date update.
CRMFG-19702	When you use Production Order Bill Maint (16.3.4) to modify the BOM of a repetitive scheduled order, the system no longer displays the detail allocation frame. The system now displays an error message, stating that editing the BOM of a repetitive scheduled order is not allowed.
CRMFG-19726	By default, when creating a joint production order set, the system should use the manufacturing lead time of the base item to calculate the due date. Previously, if you started with a co-/by- product, the system calculated the order's due date based on the co-/by-product's manufacturing lead time. This issue has been fixed and the system now uses the base item's manufacturing lead time to calculate the due date or release date for production orders related to co-/by-products.
CRMFG-19729	Work order sets are renamed production order sets to keep consistency. When you delete a co-/by-product production order set, the system now displays a message "Delete co-/by-product production order set" instead of "Delete co-/by-product work order set."
CRMFG-19865	The system no longer hangs on data merging when leveling Kanban items.
CRMFG-19880	Previously, the Qty Required value of a component was incorrect in Inventory Master after you ran Operation Activity Transaction (16.13.13) for an exploded order. This issue has been fixed.
CRMFG-19891	Assume that Qty Required is less than Quantity Allocated, and the quantity detail-allocated is the same as Quantity Allocated in Production Order Bill Maint. If you set Quantity Allocated to a value less than Qty Required by using Prod Order Manual Allocation, the Quantity Allocated value shown in Production Order Bill Maint is now changed accordingly.
CRMFG-19893	The following fields in Production Picklist Transfer (16.5.9) now support up to nine decimal places: • Total Open Balance • Total Transaction Qty • Transaction Quantity This is consistent with the quantity to transfer displayed on the picklist.
CRMFG-19894	Previously, creating a variant item failed in Configurator Questionnaire and an error message was displayed. This issue has been fixed.
CRMFG-19928	Post Production Order Usage Variances (16.20.7) has been enhanced and no longer processes orders that are not released; for example, planned orders.
CRMFG-19931	The order number instead of the picklist number is now recorded in transaction history for picklist issue.
CRMFG-19937	When Component Issue Date Method is set to Order in Production Order Control (16.3.24), the issue date for a component on a production order bill is the production order release date, adjusted for the component lead time offset. If you change the parent order status from E to F and then back to E, the system now updates the component issue date correctly, with the component lead time offset considered.
CRMFG-19948	When both the batch size and the quantity per batch are involved during the calculation for component backflush, the calculation of the quantity to process and that of the quantity per are now combined. This ensures that Operation Activity Transaction does not over-issue inventory during auto backflush.
CRMFG-19959	MPS/MRP Detail Report can now be launched successfully.

QAD Internal Ticket ID	Description
CRMFG-19965	Previously, the system might display “Quantity to issue is greater than quantity required” on Operation Activity Transaction (16.13.13) even though the Qty Required and Total Issue Qty values displayed on the UI were the same. That is because the system rounded decimals and then displayed them on the UI, which led to inconsistency between the actual values and the values displayed. This issue has been fixed and the anchor field “open quantity” is now rounded to match UI operations.
CRMFG-19966	Running Selective Materials Plan (23.3) for the parent item no longer leads to incorrect Qty Required values of its components.

Workbenches for Production Orders Enhancements

The following section describes enhancements to QAD Planning and Scheduling Workbenches for Production Orders.

Support for Co-/By-Products

You can use the MSW/PSW to manage co-/by-product production orders, such as creation, modification, deletion, and scheduling.

For information about the co-/by-product features supported by the MSW/PSW, refer to the *QAD Planning and Scheduling Workbenches User Guide*.

Verification upon Views Stored on ERP-version Workbenches

When loading stored views from ERP-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 3.1, 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 ERP-version Workbenches. If so, an error message is displayed, prompting you to re-create such views.

Enhanced Production Line Switching

Previously, when there were two production lines, each of which was linked to a large number of items, switching between the two lines on the MSW took a long time.

In this release, the MSW performance is improved and the switching duration between such two lines is shortened.

Improved Order Saving Performance

Previously, when saving a large number of production orders on the MSW, the client GUI was locked until the save was completed. No user operation was allowed during the saving process.

In this release, the logic has been updated and the client GUI is available during order save. This enables you to take actions when orders are being saved, thereby facilitating user operations and improving efficiency.

Updated Setup Time Logic for Production Line Items

You can link multiple items to one production line for manufacturing those items on the line. You can also specify attributes and options for each item, such as setting different Setup Time values.

When you use the MSW to level a production line item whose setup time is 0, the system now uses the Setup Time value defined for the production line during EPEI calculations.

Production WIP Status

The Production CUM Activity window has been renamed Production WIP Status.

The Production WIP Status window displays WIP status information for discrete orders, repetitive scheduled orders, and split scheduled orders.

Leveling with Fixed Orders

Production orders can now be leveled within a time bucket that includes fixed orders, those with production order status E, A, or R, as well as non-fixed orders, those with production order status P or F.

Before this release, production schedules were leveled correctly only when there were non-fixed orders within a time bucket. The required production capacity for fixed orders within a time bucket was not calculated correctly, resulting in the miscalculation of the available capacity for scheduling and leveling non-fixed orders.

Recording Modified Fields in Client Log File

If you load a production order record to the MSW, modify it, and then save it on the MSW, the MSW checks whether this order has been modified by another user or in another program after you load it to the MSW. If so, the MSW displays an error, indicating the commit failure. The error message, however, does not contain any information about which fields have been modified for the order.

The MSW now automatically records the field inconsistencies in the client log file. In this scenario, you can check the log file to identify the modified fields.This helps you to locate the root cause.

Enhanced Record Processing Performance

Previously, if a large number of supply or demand records existed on the MSW, the MSW might take several minutes to load, unload, or refresh the records.

In this release, the MSW functionality has been enhanced, therefore improving the processing performance.

The following fields are now available on the Data Load tab page of the Preferences dialog box, allowing you to define the record loading horizon and filter items:

- Include active item in window only
- Backward Days
- Forward Days

If you select “Include active item in window only,” and enter values in Backward Days and Forward Days, the system calculates the start date and end date of the loading horizon as follows:

Start date = Today’s date - Value in Backward Days

End date = Today’s date - Value in Forward Days

Note If both values are 0 (zero), no filtering takes effect.

Then the system loads only the items that fall in the loading horizon.

Important When "Include Items with No Activity" is selected, search functions return data for all items associated with the resources retrieved, and the settings of the other fields in the Include activity window are ignored.

The MSW now performs well and responds promptly when loading, unloading, or refreshing a large number of records.

Minimum Interval Parameter Applied for Leveling Non-Kanban Items

A new field, Minimum Interval, has been added to Production Line Maintenance (16.1.1) and Item Production Line Maintenance (16.1.4).

Use the Minimum Interval parameter to:

- Control how frequently items are produced within a time bucket when leveling.
- Reduce the number of orders that are created by leveling.

The minimum interval:

- Is the shortest number of hours for producing an item.
- Determines the frequency at which an item is produced.

Setting the minimum interval to the number of hours for a workday prevents leveling from creating more than one order for an item in a day.

Leveling uses the:

- Minimum Interval instead of EPEI for scheduling items within a time bucket when the calculated EPEI is less than the minimum interval.
- Greater of the minimum interval set for the item and production line, the production line, and the calculated EPEI.
- Calculated EPEI when minimum interval is set to 0.

As rule, set Minimum Interval for a production line, rather than setting it for items on a production line.

- Production Line Maintenance

  Set Minimum Interval in hours to determine the smallest production interval for leveling every item.

  For example, if Minimum Interval is set to 16 hours when the calendar consists of six 8-hour work days, it limits the production to one interval for every two workday, or three intervals per 48-hour week.

- Item Production Line Maintenance

  Set Minimum Interval for an item only when there is an exception for that item.

  Set Minimum Interval in hours to determine the smallest production interval for a particular item.

  Use this menu when the interval for the item is different than for the production line.

No Required Quantity Lost During EPEI Leveling

During EPEI leveling, if all of the production line capacity in a time bucket is consumed but there is a leftover quantity waiting for production, the system now generates a supplementary order on the last day of the time bucket, making sure that all quantity required is produced.

Removed Order Status B

The Workbenches no longer support production order status B (Batch) since this status has been removed from Production Orders 3.1.

Supported for Two Decimal Places in Required Capacity in PSW

In earlier releases, only one decimal place was supported in the Required Capacity field in the PSW while this field in the Production Order Maintenance Details tab supported up to two decimal places.

The Required Capacity field in the PSW now supports two decimal places to ensure consistency.

Workbench Fixes

Table 4
Workbench Fixes

QAD Internal Ticket ID	Description
CRMFG-18982	You can define shifts in Production Line Calendar Maint (16.1.13.1) and add calendar exceptions for a shift in Production Line Cal Except Maint (16.1.13.3). If the sum of the working hours defined for a shift in Production Line Calendar Maint and those defined as an exception for the shift is smaller than 0, the system considers the total working hours in the shift is 0. The MSW/PSW has been enhanced to apply the same logic, making sure that the total capacity in a day calculated by the MSW/PSW is consistent with that shown in Production Line Calendar Maint.
CRMFG-19308	Previously, after you reconfigured the Process value for a co-/by-product on the Order Relationships tab page, the order status was automatically changed from F to E on the Production Order Maintenance tab page. This issue has been fixed.
CRMFG-19367	After you select a work center resource on the MSW, if you open Production Order Maintenance on a separate tab page, update the due date, and then back to refresh the MSW, the change is updated accordingly.
CRMFG-19395	After a production order is generated during leveling, its BOM and routing information is automatically obtained and displayed on the MSW. This improves operation efficiency.
CRMFG-19429	When you change the quantity of an order on the MSW, the BOM and routing quantities are now changed accordingly.
CRMFG-19430	If you create a production order again on the MSW/PSW, the system automatically copies the BOM and routing from the existing production order to the one you are creating. This saves time and improves efficiency.
CRMFG-19437	Previously, the MSW/PSW used the due date to check whether a CUM order should be loaded. So if a repetitive CUM order had a blank end date (due date for a CUM order), the MSW/PSW could not load it. This issue has been fixed.
CRMFG-19445	The Post variances at SFC field has been removed from the Accounting Data tab page of the MSW/PSW.
CRMFG-19456	Both the Batch and Lot Number fields on the Compliance tab page can now support up to 18 digits in length while the Grade field supports up to 2 digits.
CRMFG-19466	The MSW can obtain the production line calendar that has just been created and displayed on the detail tab page, but EPEI leveling cannot. The system displays an error message instead, saying there is no time for EPEI leveling.
CRMFG-19481	Previously, if you clicked the Delete button on the keyboard to remove a resource group, the system deleted the group from the `ResourceGroupMaster.xml` file. As a result, the production line was unavailable in the MSW/PSW navigation panel. This issue has been fixed.
CRMFG-19487	On the MSW/PSW, if you change the order quantity when Adjust Co/By Order Quantities is selected, the system adjusts the order quantity of all joint order sets regardless of the order status.
CRMFG-19488	If you expand a production line or work center and load orders on the MSW, and then collapse or expand any folder, the folder is now opened successfully and all .NET UI applications are running properly.

QAD Internal Ticket ID	Description
CRMFG-19524	Previously, if you selected “Include Items with No Activity” and loaded a production line on the MSW, No was displayed in the Activity column for all items in the Schedule grid. If you cleared “Include Items with No Activity,” Yes was displayed. This issue has been fixed, and correct values are displayed in the Activity column.
CRMFG-19552	When you close the MSW/PSW for Production Orders, the system checks whether there is any running background processor. If any exists, the system displays an error message: “Background processor is running. Please try again later.”
CRMFG-19647	After you choose Option > Preferences on the MSW and press Ctrl+A on the Data Load tab page in the Settings dialog box, the As of Date field is displayed, allowing you to change today to a specific date. Previously, if you changed the PC locale setting from the US time format to the UK time format and then opened the MSW, the system would go down or read the wrong As of Date value. This issue has been fixed.
CRMFG-19680	Filters now work properly on the PSW.
CRMFG-19864	The unload function on the MSW now works properly when Display Shifts is set to Yes.
CRMFG-19899	Previously, after you used the MSW to load a production line at a site and level the line, you could not load another production line at the same site. This issue has been fixed.
CRMFG-19900	Previously, if you used the MSW to level two production lines at one site in sequence, the leveling results of the production lines were affected mutually and became incorrect. This issue has been fixed.
CRMFG-19917	When loading views with different horizon settings, the MSW now ignores the column resizing error to avoid .NET UI crashes.
CRMFG-19933	After you use the MSW to level a production order, the MSW automatically splits the order that crosses one day into two scheduled orders, and the setup time of the second scheduled order is 0. If you click Save and then check the details of the second scheduled order, the setup time is saved successfully.
CRMFG-19986	Previously, when you refreshed resources on the PSW, the PSW might leave column names untranslated and display them in disorder. Now, the Production Scheduling panel can display the correct column names and sort the columns in order.