Training Guide

QAD Web UI Quick Start

70-3401-2018EE
QAD Cloud ERP with Web UI 2018
March 2019

WebUI_QuickStart_TG_v2018EE.pdf/xcm

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Change Summary

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

Date/Version	Description	Reference
March 2019/2018EE	1st Release	--
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		--

About This Course

Course Description

This course provides quick start training on QAD Web UI by offering a high-level overview of most of the core features of the QAD system. The quick start is for students who want to rapidly begin using the application software. This accelerated course provides a focused introduction to the fundamentals of the system and demonstrates how features apply to critical business processes.

Topics will be presented and then practiced with hands-on exercises. On the last day, students will have the opportunity to test their understanding and knowledge by working on an extended exercise covering most of the topics discussed during the class.

Course Objectives

By the end of this class, students will:

- Have a thorough understanding of the concepts underlying QAD Web UI
- Be able to navigate, browse, and report in QAD Web UI
- Understand the best practices for setting up and using QAD Web UI
- Understand how QAD Web UI security concepts and setup
- Be able to admin the system users and functions in QAD Web UI
- Be able to complete the basic business processes of the Actioin Center, Platform, etc.

Audience

This class is intended for QAD users, who have the knowledge of QAD Enterprise Edition and would like to understand QAD WebUI, include QAD customers, partners, as well as QAD R&D and Services and Support personnel.

Prerequisites

In order to obtain maximum benefit from this class, an understanding of QAD Enterprise Edition is required.

Course Credit and Scheduling

This course provides 12 credit units. It is designed to be taught in 2 days.

Virtual Environment Information

The hands-on exercises in this book should be used with the latest Enterprise Edition learning environment.

When prompted to log in, specify demo@qad.com for user ID and qad for password. In general, students are more comfortable with static data they are familiar with such as currencies and addresses. However, it is up to the instructor to decide which exercise set to use, depending on the audience.

Additional Resources

If you encounter questions on QAD software that are not addressed in this book, several resources are available. The QAD corporate Web site provides product and company overviews. From the main site, you can access the QAD Learning or Support site and the QAD Document Library.

Access to some portions of these sites depends on having a registered account.

http://www.qad.com/

QAD Learning Center

To view available training courses, locations, and materials, use the QAD Learning Center. Choose Education under the Services tab to access this resource. In the Learning Center, you can reserve a learning environment if you want to perform self-study and follow a training guide on your own.

QAD Document Library

To access release notes, user guides, training guides, and installation and conversion guides by product and release, visit the QAD Document Library. Choose Document Library under the Support tab. In the QAD Document Library, you can view HTML pages online, print specific pages, or download a PDF of an entire book.

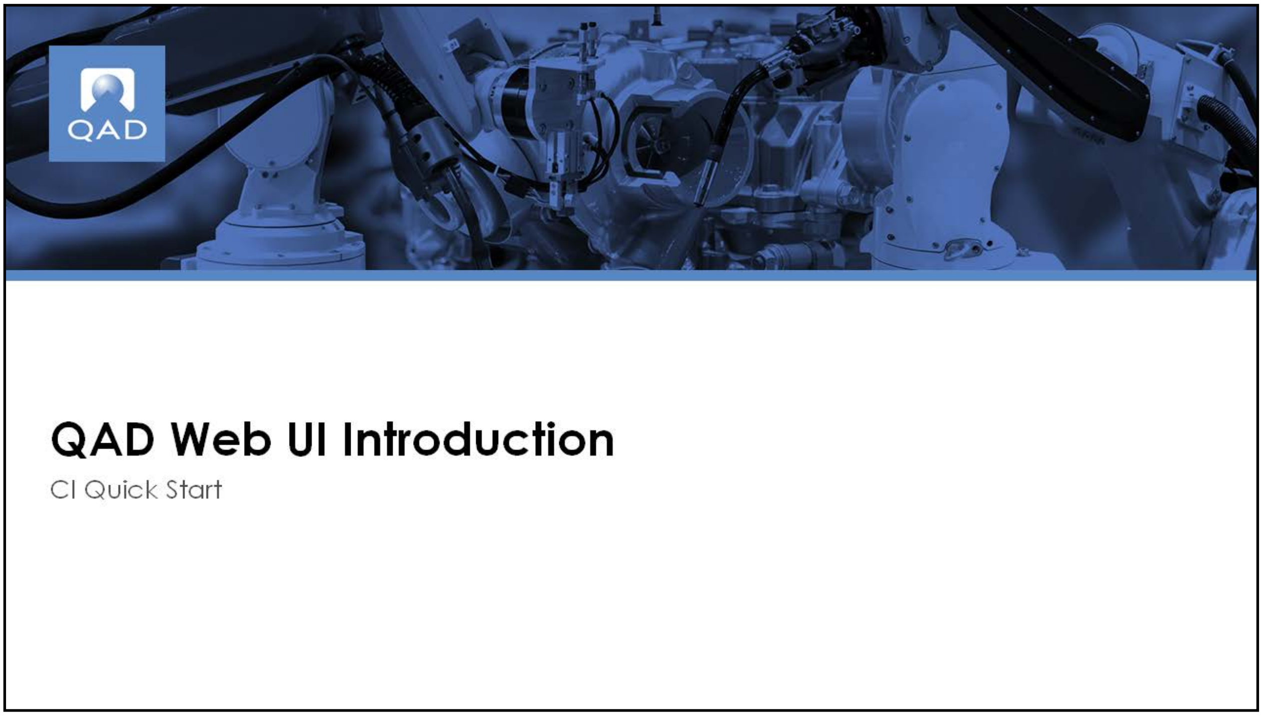
To find a resource, you can use the navigation tree on the left or use a powerful cross-document search, which finds all documents with your search terms and lets you refine the search by book type, product suite or module, and date published.

QAD Support

Support also offers an array of tools depending on your company’s maintenance agreement with QAD. These include the Knowledgebase and QAD Forums, where you can post questions and search for topics of interest. To access these, choose Visit Online Support Center under the Support tab.

CHAPTER 1

QAD Web UI Introduction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Facilities


Facilities
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Class Hours
Emergency
Messages
Breaks
EXIT
Restrooms
Parking
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QAD

Quick Start

Overview

Introductions

Overview

- QAD Enterprise Applications Web UI
- Role-based Menus
- Menu Access
- Menu Item Types
- Menu Item Views
- Collaboration
- Role-based Security
- Action Centers
- QAD Platform
- Terminology

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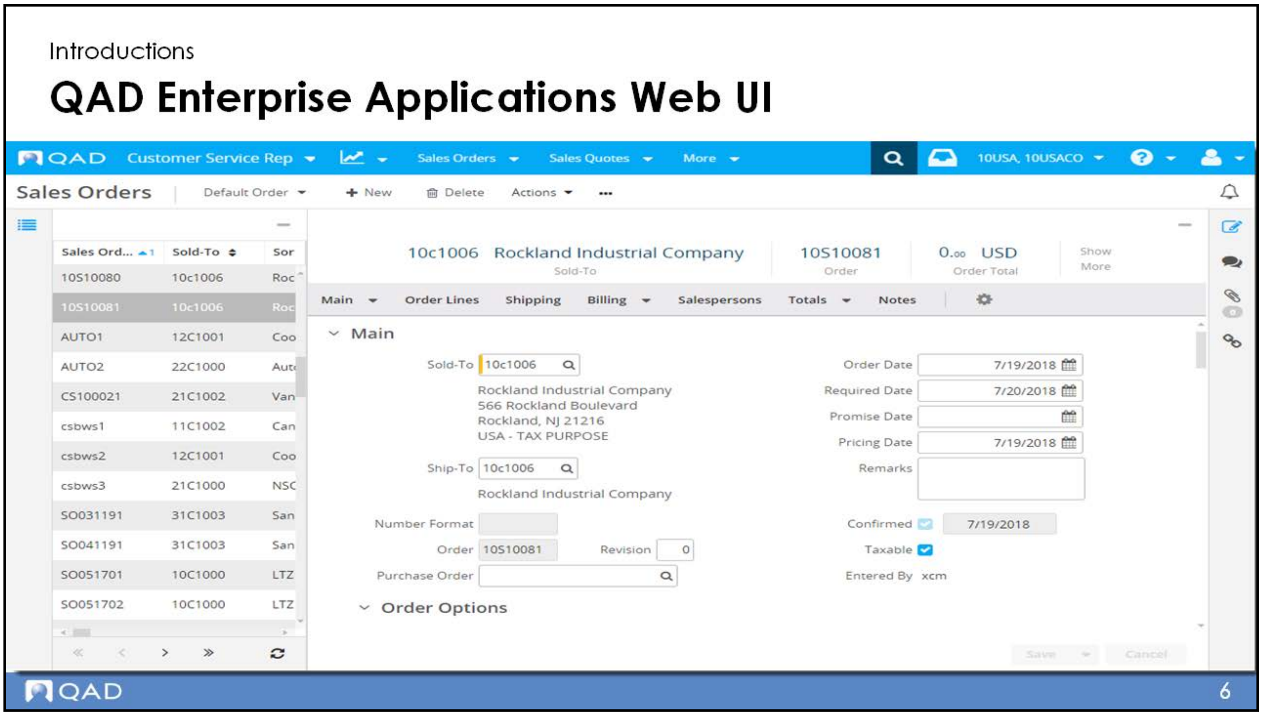
QAD Enterprise Applications Web UI



QAD Enterprise Applications Web UI streamlines tasks, making them faster and more efficient.

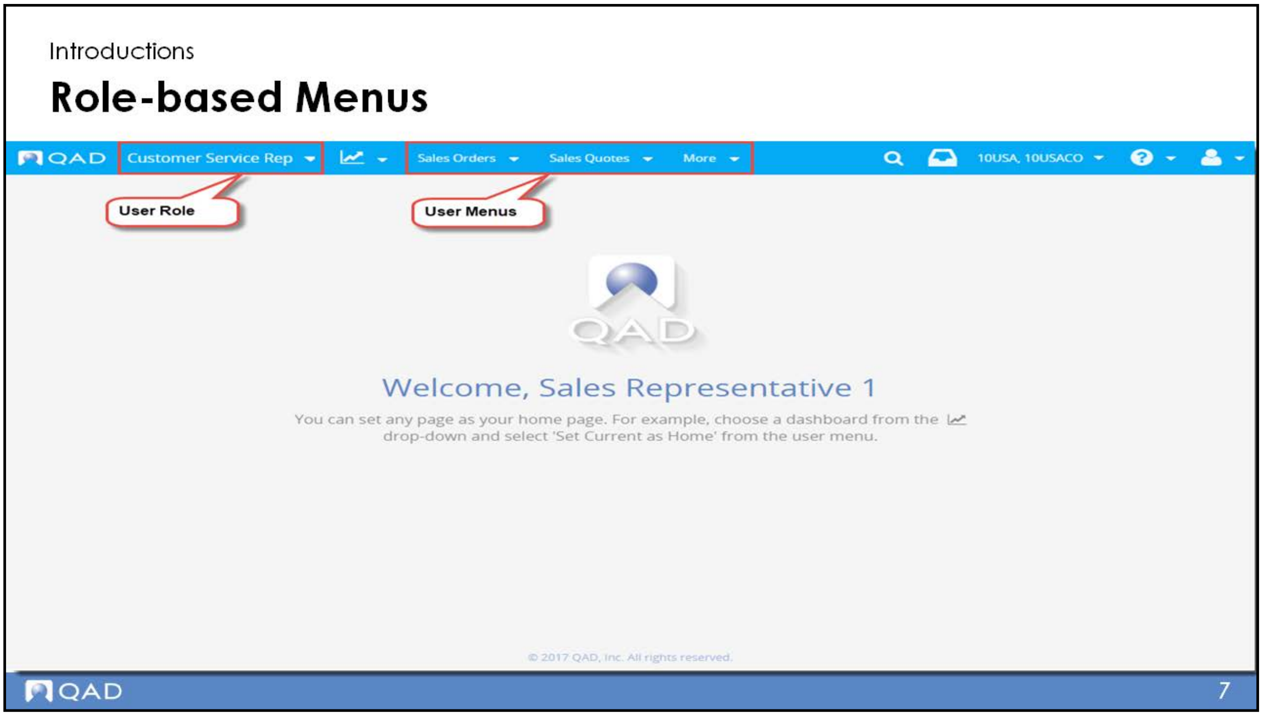
The QAD Web UI is based on a new architecture in QAD Enterprise Applications that offers a layered, services-oriented architecture, with separate layers responsible for presentation, business logic, data, and foundation services.

This layered approach makes possible the new, responsive user experience. The QAD Web UI is designed for desktop and mobile interaction with QAD Enterprise Applications in the Cloud.

In QAD Cloud ERP, the QAD Web UI offers mobile access, enabling QAD Enterprise Applications to run anywhere, anytime and on any device.

The QAD Web UI provides a web-based user interface to the resources of QAD Cloud ERP. These resources include views that bring together forms and browses, reports, action centers, and many more. Resources are organized within apps that bring together related business services. For example, for Customer Management, the Sales app brings together business services for the Salesperson view, Sales Quotes view, Sales Orders view, and many more.

Role-based Menus

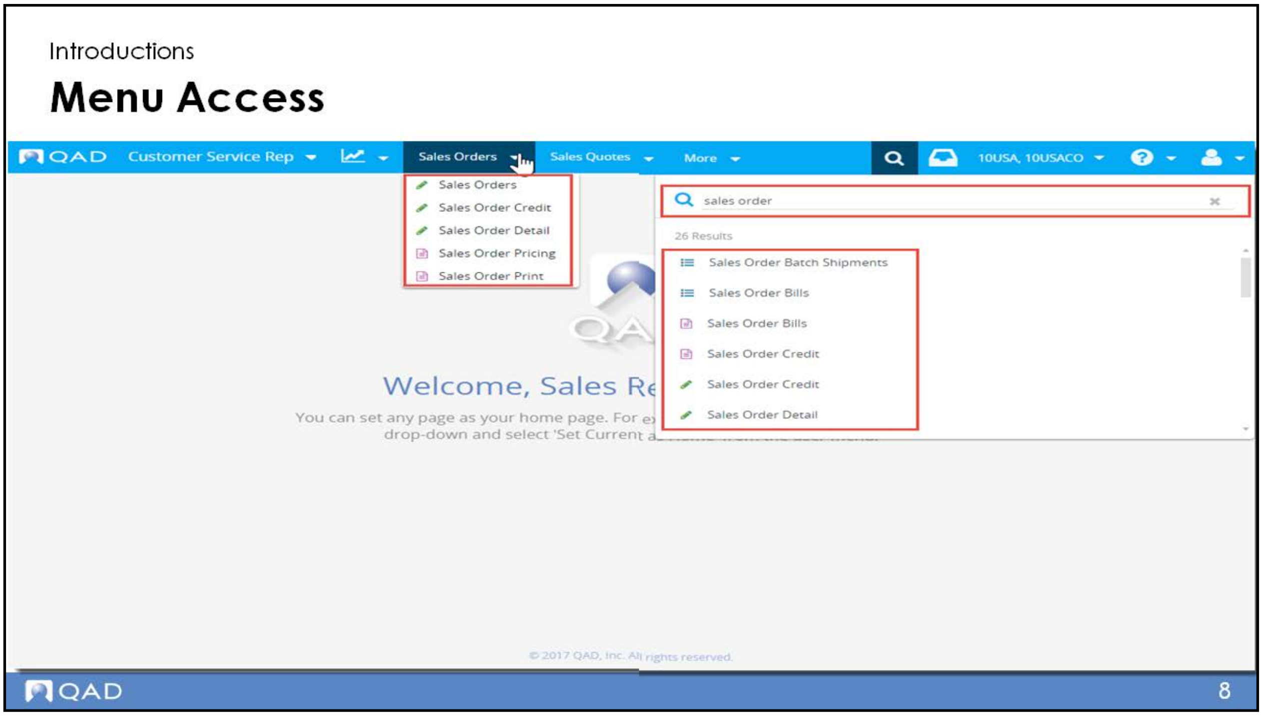


QAD Web UI is based on Role-based Access and Security.

When user login to QAD Web UI, the system checks the user role membership, role permissions, and user role menus etc. and displays the menus in the Menu Bar area based on the user role menus organization.

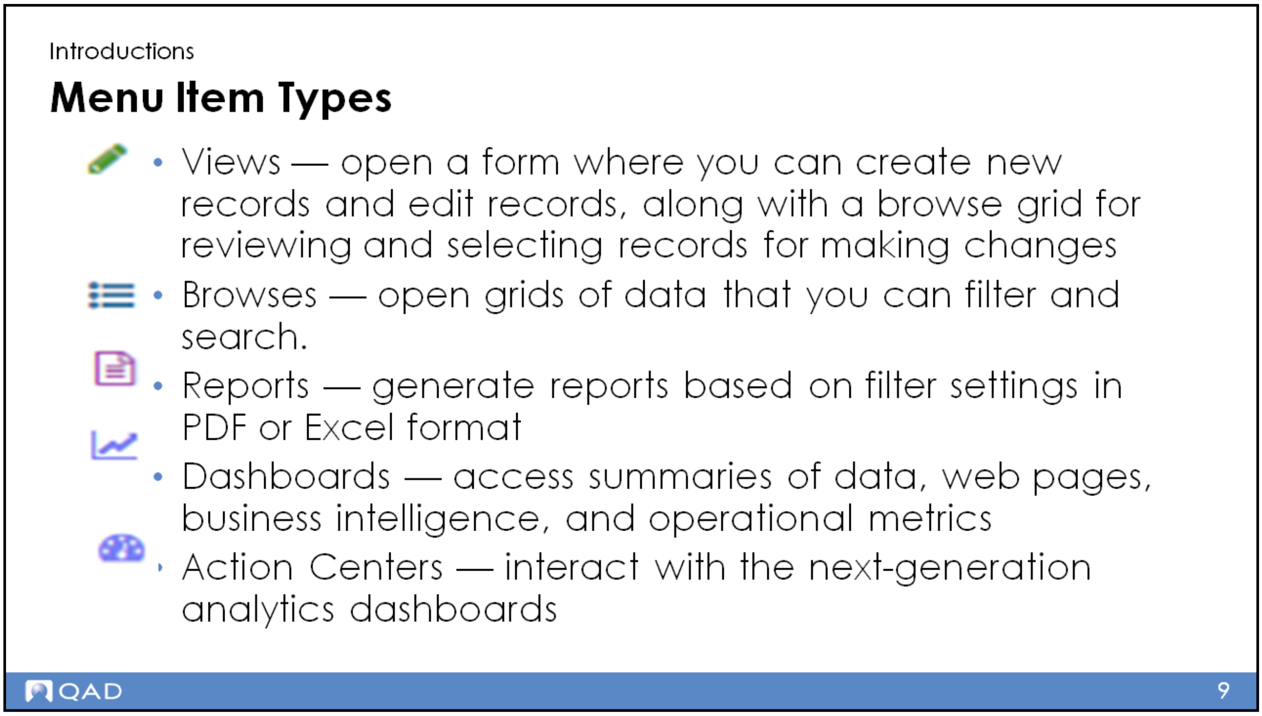
If one user has multiple roles, select different role to have different menus displayed accordingly.

Menu Access

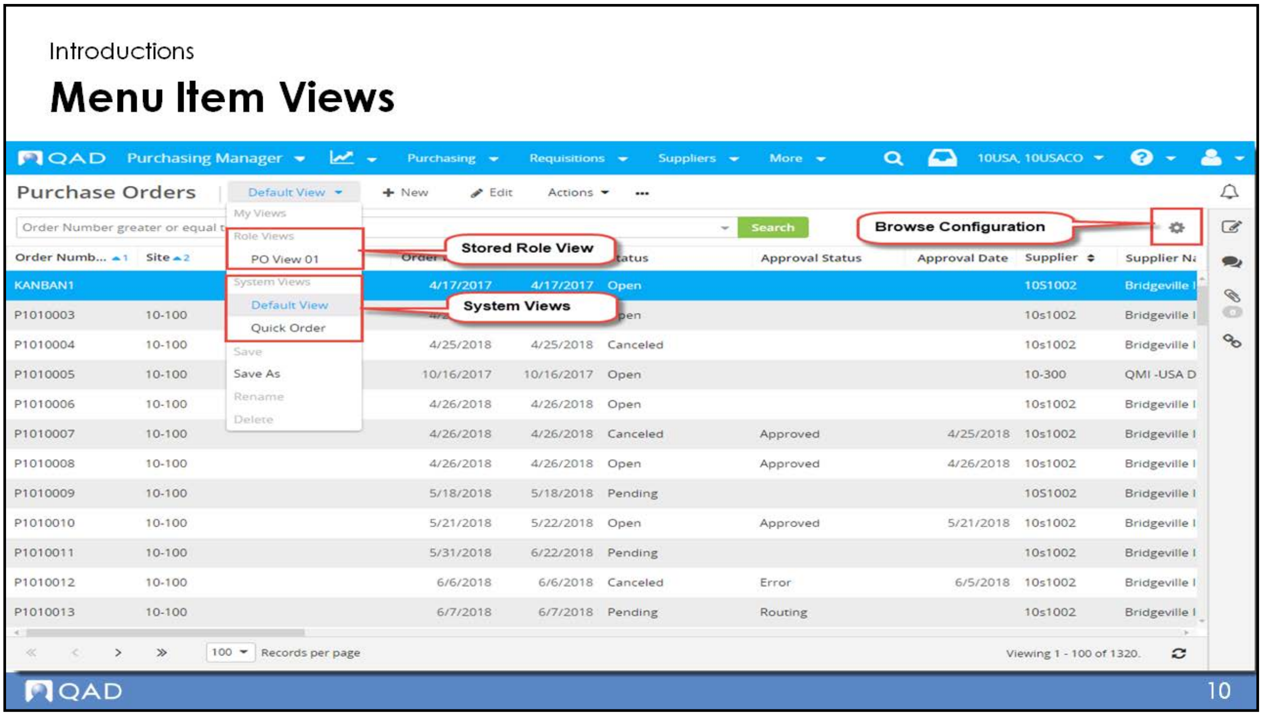


User can access menu from menu drop-down list. Or user can search menu who have the permission to access. The system keeps recently searched menus so user can easily to access often using menus.

Menu Item Types



Menu Item Views



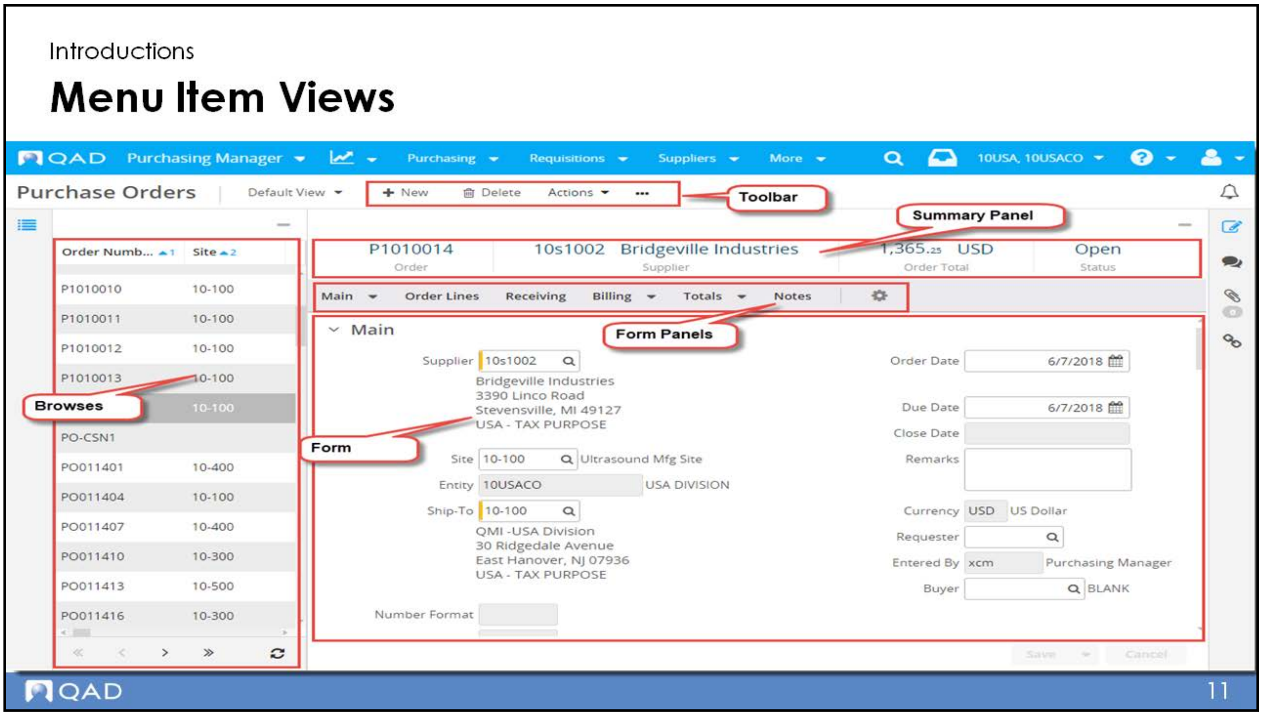
The QAD Web UI menu offers views in which you can interact with QAD Enterprise Applications. Because views combine forms and browses, they are also called hybrid views.

For a menu item, some views include predefined system views for your convenience. For example, Purchase Orders includes a Quick Order view that includes only the panels that contain required fields, while the Default View includes all of the panels. Security settings can limit what a given role can see and update, tailoring access for that role.

You can modify a view and then save it for later use as a stored view. Aspects of a view you can modify include the grid columns, grid search conditions, and form panels. After configuring a view, you can save it as a stored view from the drop-down located next to the view title. Once saved, a stored view is available from a pull-down menu located next to the view title.

Stored views can be made available just to you, can be shared with selected roles, or can be made available to everyone on the system.

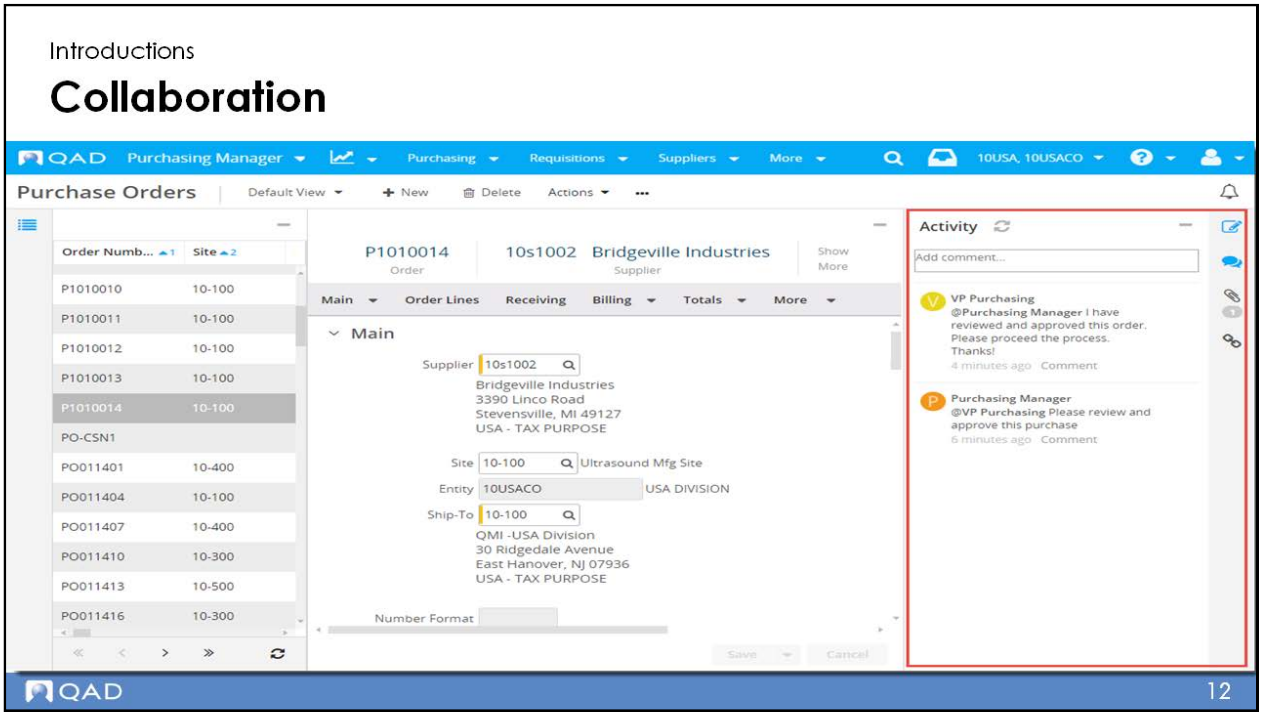
Menu Item Views



A view includes a toolbar along the top, a grid (or browse) displaying a list of records, and a form for completing work. Because views combine forms and browses, they are also called hybrid views.

The form organizes everything you need on a single page, typically starting with a summary panel at the top. Related fields and functions are grouped within panels. The navigation bar, located just below the summary panel, allows for quick access to any panel of interest. You can quickly access anything on the form by scrolling or using the navigation bar.

Collaboration



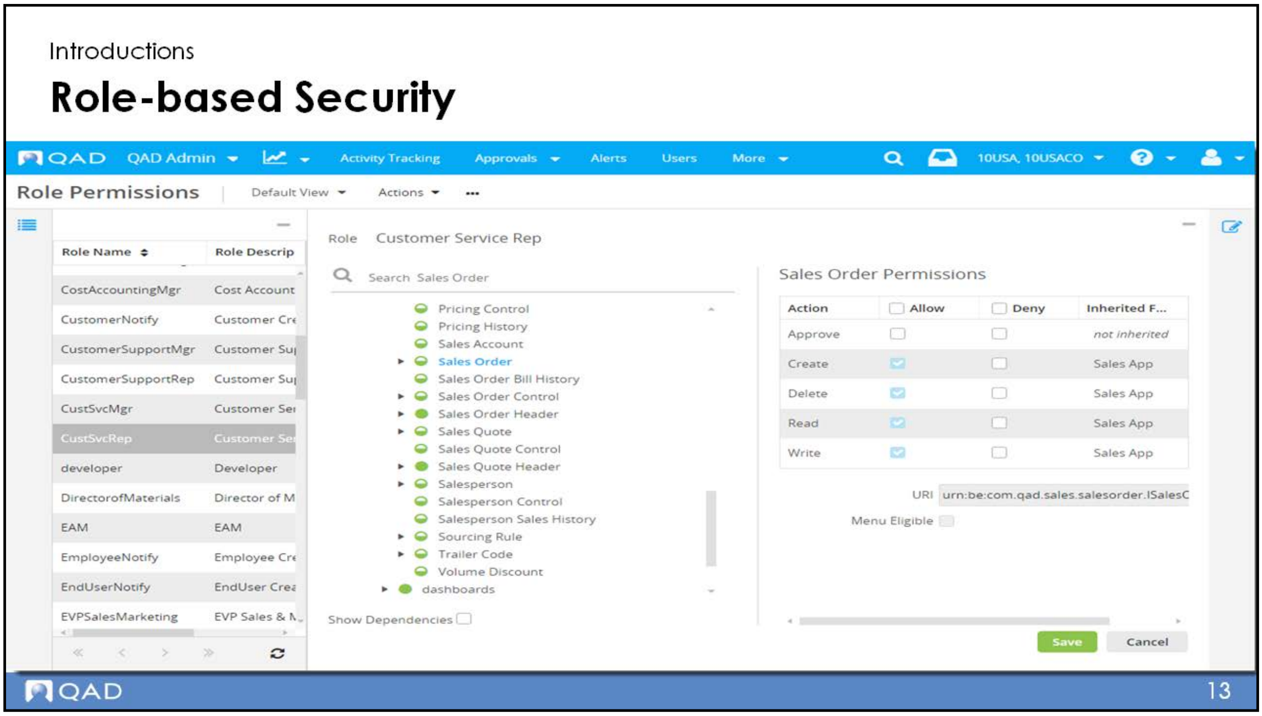
From a form, open the Activity panel on the right side of the page by clicking on the Activity icon along the right. You can comment on activity in a way similar to how you use social media.

You can add comments directly to the activity feeds, and mention the names of other uses in the comments by first typing the @ symbol.

Tagged users receive Inbox notifications that they have been mentioned in a comment. They can then go directly from their Inbox notification to the form and its activity panel. They can also simply reply to the Inbox notification.

You can attach files to views to keep relevant documents together for a particular transaction. For example, you can attach spreadsheets, Word documents, and PDFs to a purchase order.

Role-based Security



Security model components include Users, Roles, Permissions, Menu Security, Field Security, Business Entity Security, Service Security, and Secured Resources.

Role-based access security is a mechanism that governs a user’s ability to gain access to domains, entities, sites, and menu-level functions.

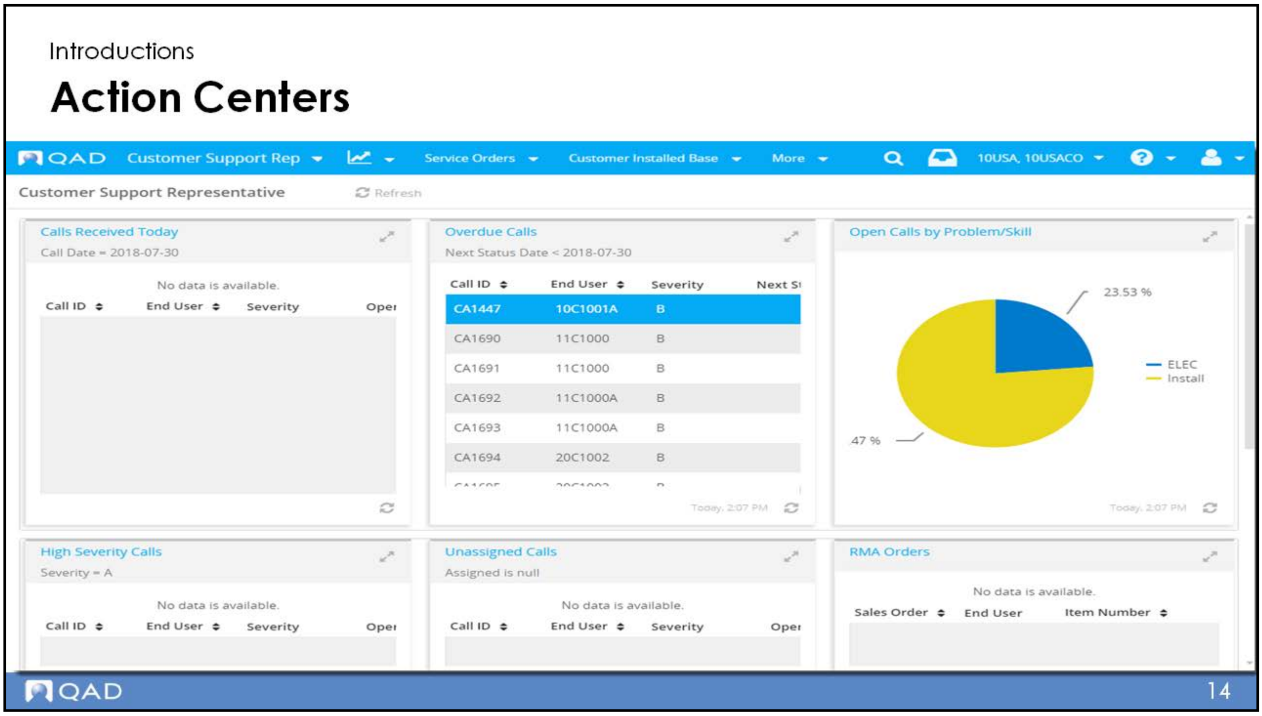
Role-based access security operates through the use of several key components: Roles, Role permissions, Role membership.

Use Role Permissions to assign the permissions to the role and ensure the role can access the business entities, browses, lookup tables, and dashboard panels required to perform its tasks.

Use User Access to assign Domain, Entity and Roles to user.

Use Menus to assign and organize the menus for a role and also assign the permissions to the menus.

Action Centers

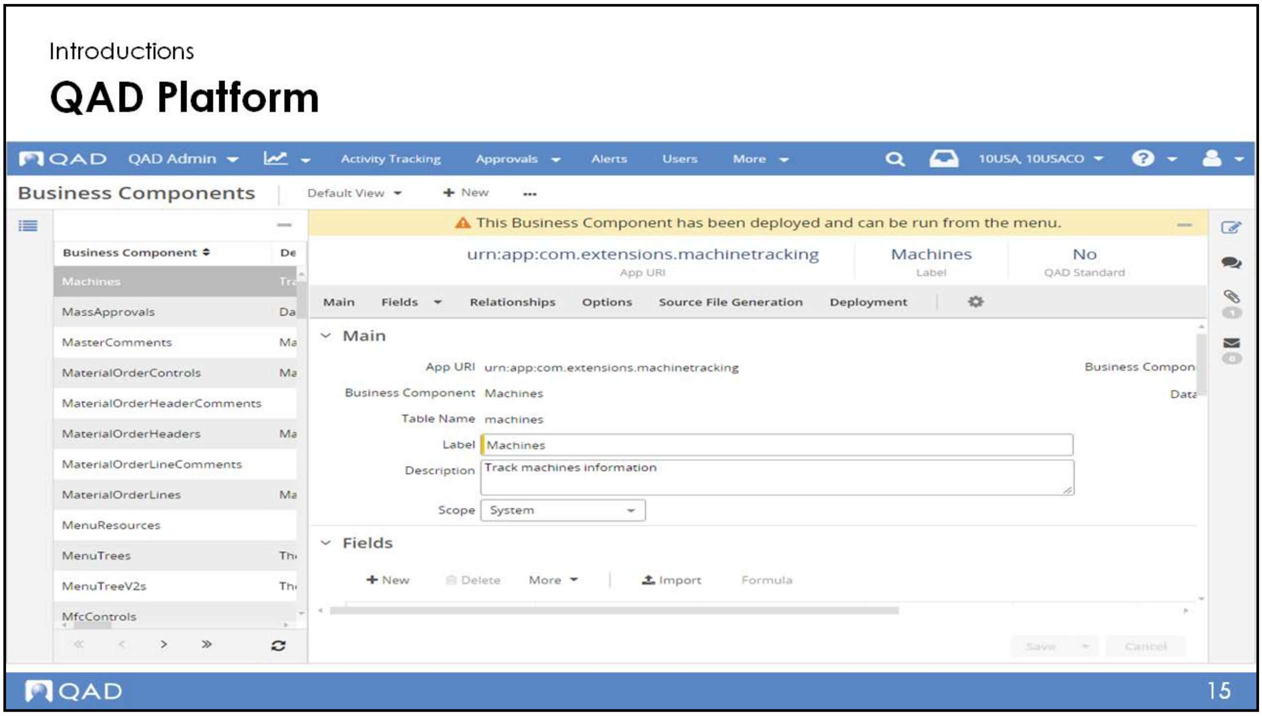


Action Centers provide managers with insights into their business in a visual format. They offer next-generation analytics, which allow managers to monitor KPIs that provide insights into particular areas of responsibility.

The KPIs are based on operational or financial browses and Financial Report Writer (FRW) KPIs created in the .NET UI, and on browses built using the Entity Builder functionality. They provide slice and dice capabilities, so that you can modify the data output according to your needs. These embedded analytics read the data directly from the core ERP system in real time or daily, depending on your needs.

Visuals are graphical representations of the KPI data in chart or table form. After you create a visual, you can publish it to the action center Gallery. You can then create an action center with multiple tabs, each of which contains multiple KPI visuals. You can create personal action centers, and administrators can create shared action centers for distribution to a number of users based on a user role.

QAD Platform



The QAD Platform allows you to extend the QAD product by adding a new Business Entity.

The QAD Platform includes Data Stores, Apps, Entity Builder and utilizing the View Builder to create views allowing users to interact with new Business Entities.

The process start from creating an app and then define the data stores in the system. Next, you can create business entity and build view and form for the business entity. After you deployed the business entity, you can access and run the business entity. You can also set up relationships for some business entities.

Terminology

QRA: QAD Reference Architecture. Increasingly, users access the latest software from anywhere, at anytime, and their interaction with systems have evolved from keyboard and mouse to touch screen and voice input. In order for QAD's products to have a place in this environment, its architecture must promote a high degree of flexibility, accessibility, and usability. To provide a design that meets these requirements, the QAD reference architecture (QRA) describes and sets the standards for QAD's strategic architectural goals for its products.

QRA is a layered, services-oriented architecture, with separate layers responsible for presentation, business logic, data, and foundation services.

QRA Layers: The presentation layer contains the components that implement the user interface. The business layer contains the application business logic and exposes functionality to consumers through published business service APIs. The data layer represents the data store of the application. The foundation layer contains functionality and services that are common to multiple architectural layers.

Business Components: Business Components encapsulate the business logic and data necessary to represent real world elements, such as Customers or Orders, within the application.

A business component is an application business object with a specific CRUD (Create, Update and Delete) interface through which the state of a business component instance can be maintained. It is defined by a set of interfaces that together describe an application business object. A business component has a structure used to represent its state and metadata describing other characteristics of the entity. These characteristics include information about formatting and labels that can be applied to entity properties, lists of values that a property may assume and other general validations.

Apps: An App is a container of all your specific development artifacts for extensions. QAD Enterprise Application provides the standard apps such as Base, Costing, Financials, Inventory, Logistics, Purchasing, Sales, Service etc..

Data Stores: A Data Store is where data is stored and retrieved in the system. When you define a Business Component, the system will need to know where to store the structure and data of the Business Component.

Business Component Builder: The Business Entity Builder is a hybrid view which shows all business components that exist in the system. This is a mixture of business components that can be controlled in the current environment and business components that have been installed as part of other app packages. You can use the Business Entity Builder to define business components fields, relationships, and deploy business component.

View Builder: The View Builder functionality allows you to build views for visual representation of your Business Components. It also allows you to define the hybrid view and by defining the browse that should be used for selecting your business component from the menu.

Review

Introductions

Review

- QAD Enterprise Applications Web UI
- Role-based Menus
- Menu Access
- Menu Item Types
- Menu Item Views
- Collaboration
- Role-based Security
- Action Centers
- QAD Platform
- Terminology

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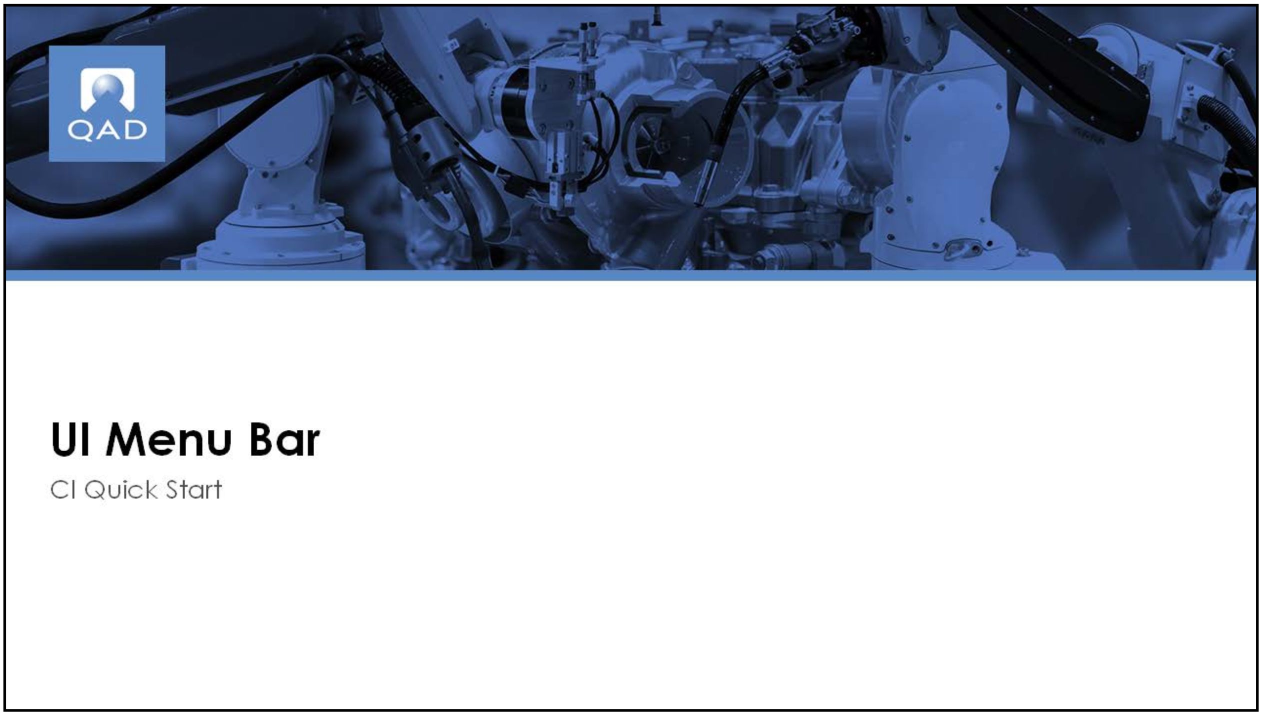
CHAPTER 2

UI Menu Bar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UI Menu Bar
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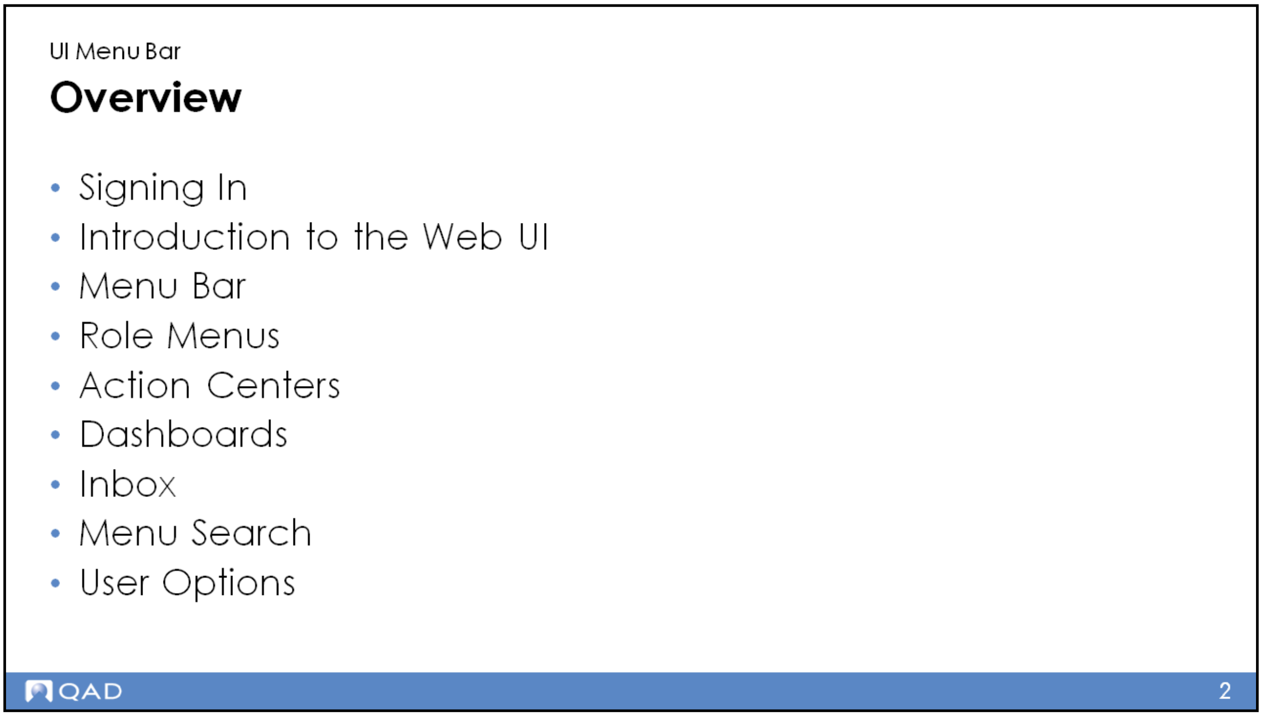
Overview


UI Menu Bar
Overview
Signing In
Introduction to the Web UI
Menu Bar
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Dashboards
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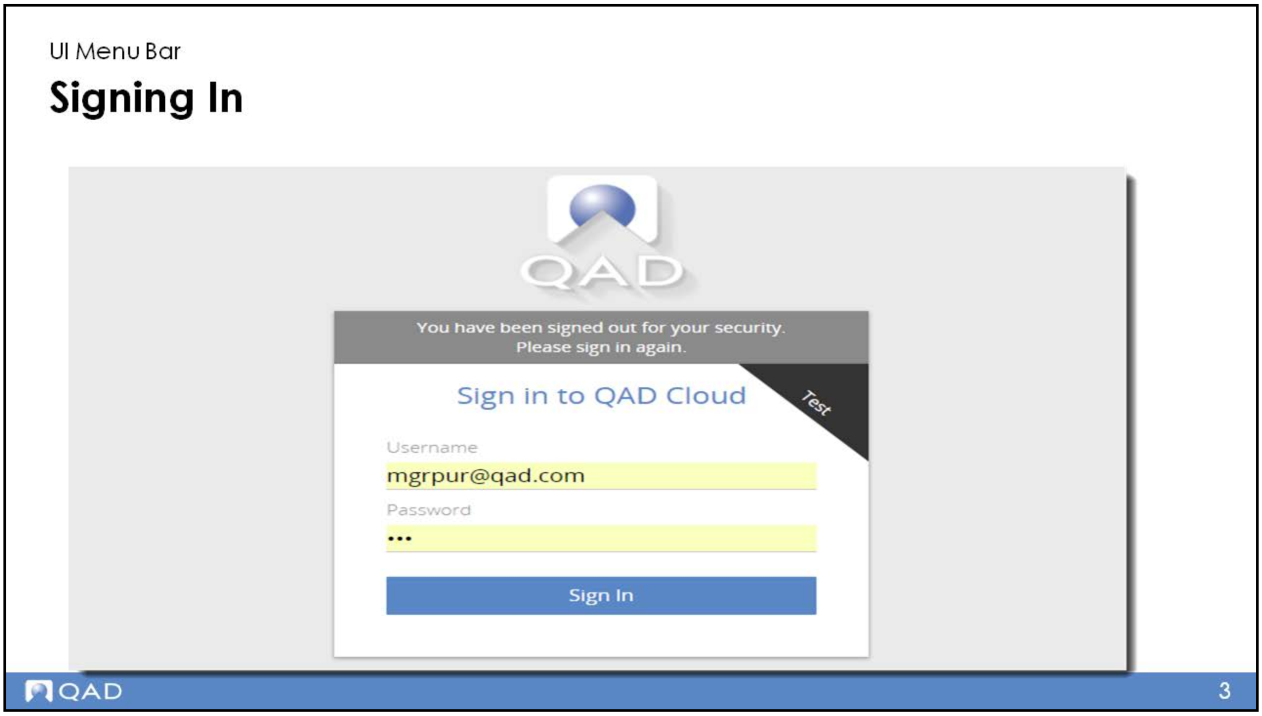
Signing In



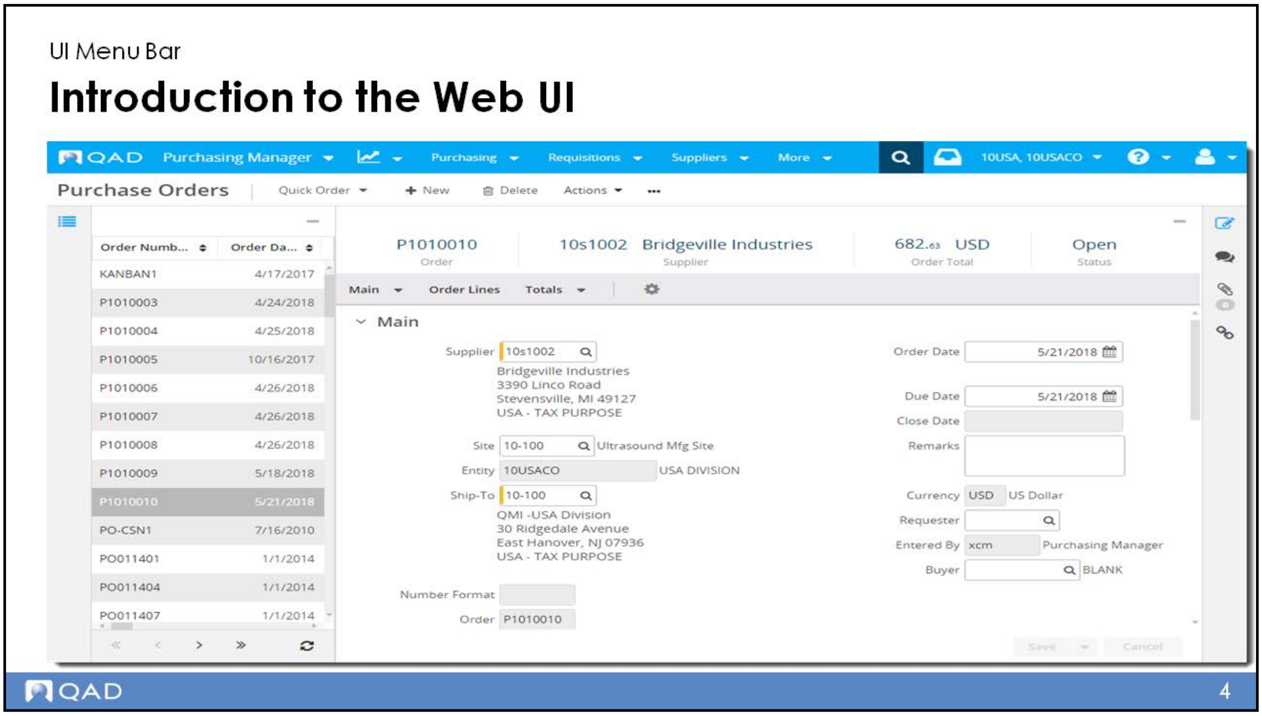
You can access the QAD Channel Islands UI from a web browser in the same way that you normally access web pages on the Internet.

To sign in, open the QAD Channel Islands UI in your browser and enter your username and password. Your username can be a user identifier or email address.

If QAD is synchronized to your company's directory service, you can sign in with your company email address and password.

The features you can access depend on your role memberships in the system. The menu options can vary depending on your role.

Introduction to the Web UI



QAD Enterprise Applications is a complete integrated suite of software solutions for enterprise resource planning (ERP). Now, a new web-based user interface is available for QAD Enterprise Applications: the QAD Channel Islands UI.

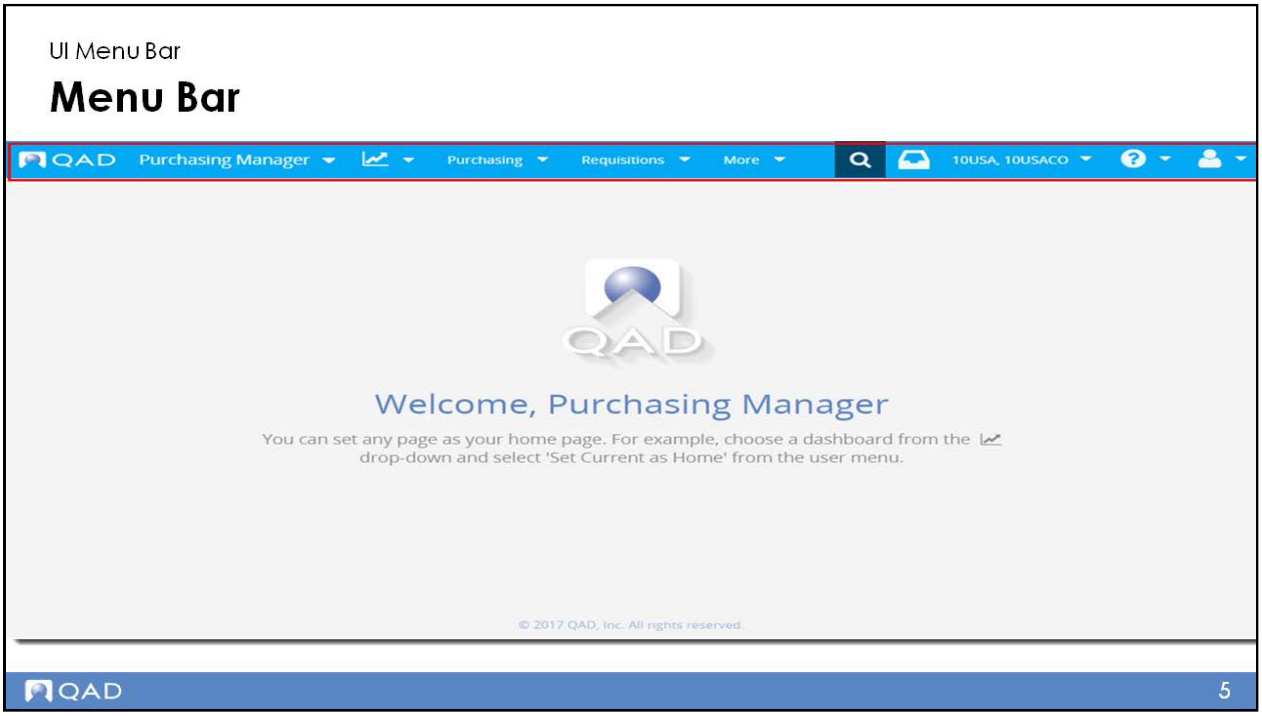
The QAD Channel Islands UI streamlines tasks, making them faster and more efficient. Simple and intuitive for the first-time user, the system also offers all the complexity needed by the power user, enabling the Effective Enterprise.

The QAD Channel Islands UI is based on a new architecture in QAD Enterprise Applications that offers a layered, services-oriented architecture, with separate layers responsible for presentation, business logic, data, and foundation services.

This layered approach makes possible the new, responsive user experience. The QAD Channel Islands UI is designed for desktop and mobile interaction with QAD Enterprise Applications in the Cloud.

In QAD Cloud ERP, the QAD Channel Islands UI offers mobile access, enabling QAD Enterprise Applications to run anywhere, anytime and on any device.

Menu Bar

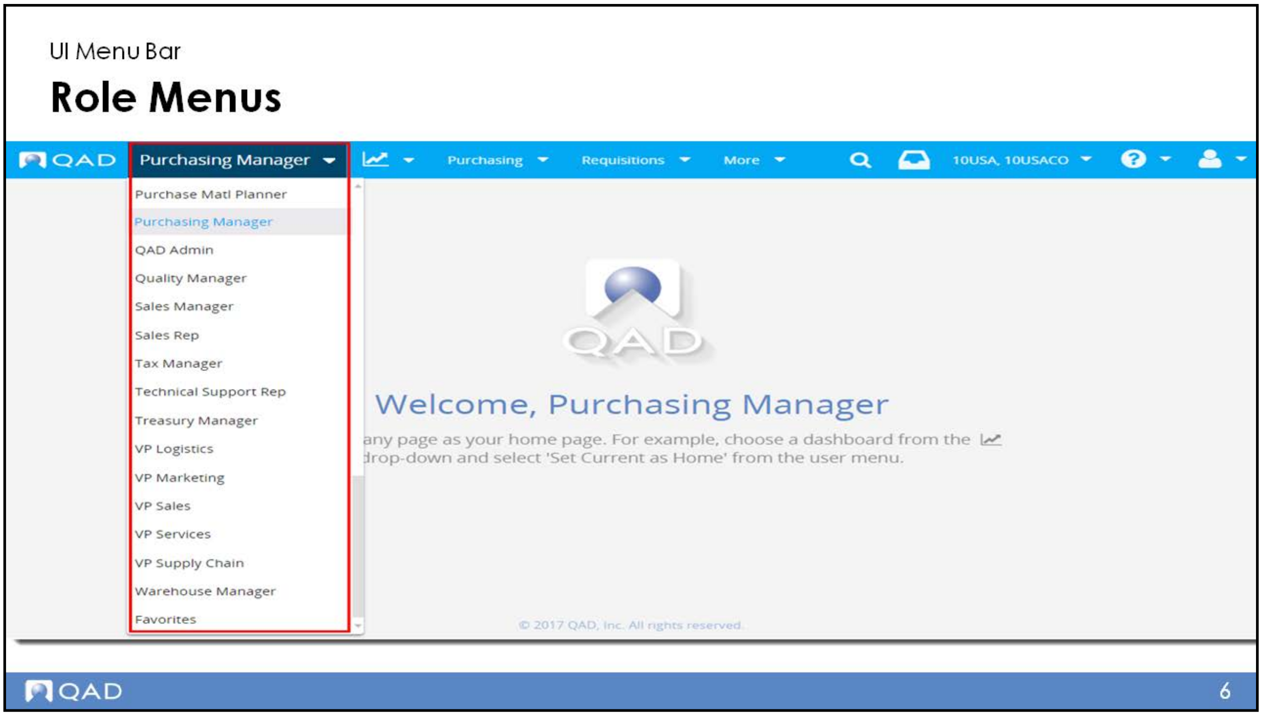


The menu bar is in the top of the screen and starts with the QAD icon, located in the upper left. Clicking on the QAD icon takes you to your home page.

After the QAD icon, the menu bar includes:

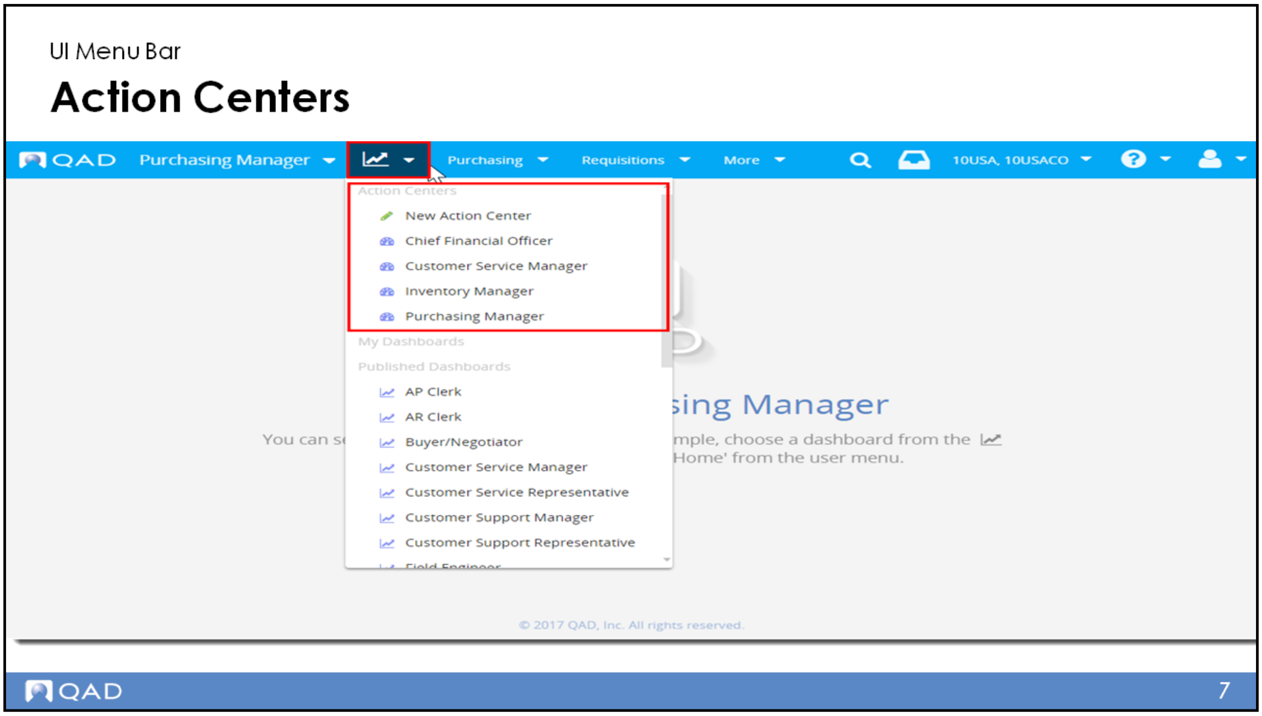
- Role and Favorites menu selection
- Action Centers and Dashboards
- Role menu options
- Menu Search
- Inbox
- Workspace
- Help
- User Options

Role Menus



On the menu bar, choose your role from the drop-down listing the roles available to you. When you choose a role menu, the menu bar displays the menu items available for the role. Choose Favorites, located at the bottom of the drop-down list, to have the menu bar display all your favorite menu items.

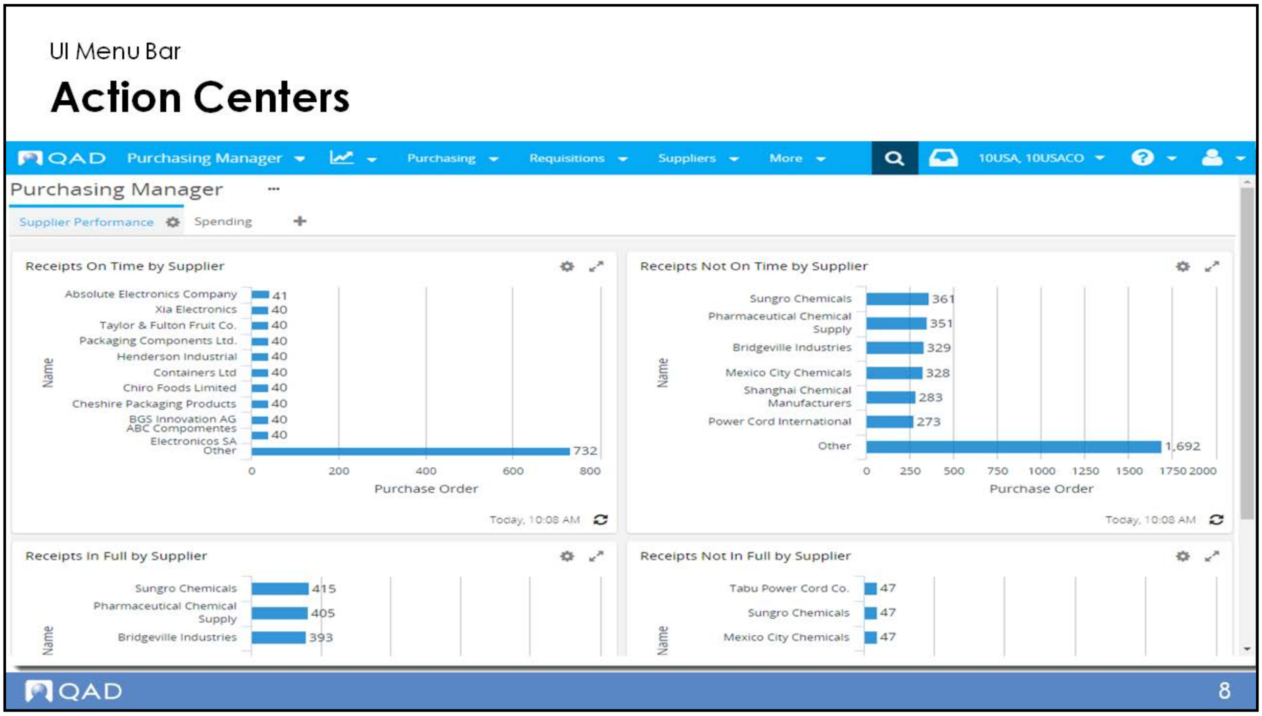
Action Centers



Action Centers provide managers with insights into their business in a visual format. They offer next-generation analytics, which allow managers to monitor KPIs that provide insights into particular areas of responsibility.

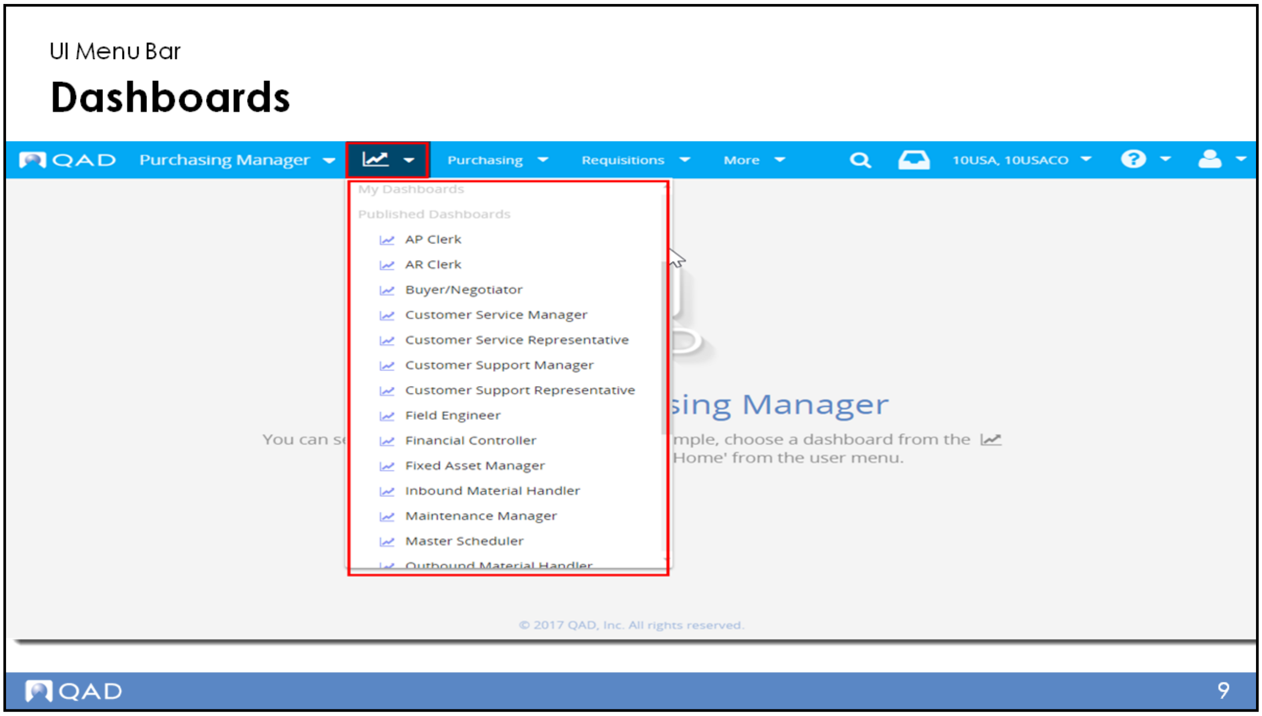
Choose an action center to view from the dashboard icon drop-down listing all the action centers available to you.

Action Centers



An example of Action Centers: Purchasing Manager.

Dashboards



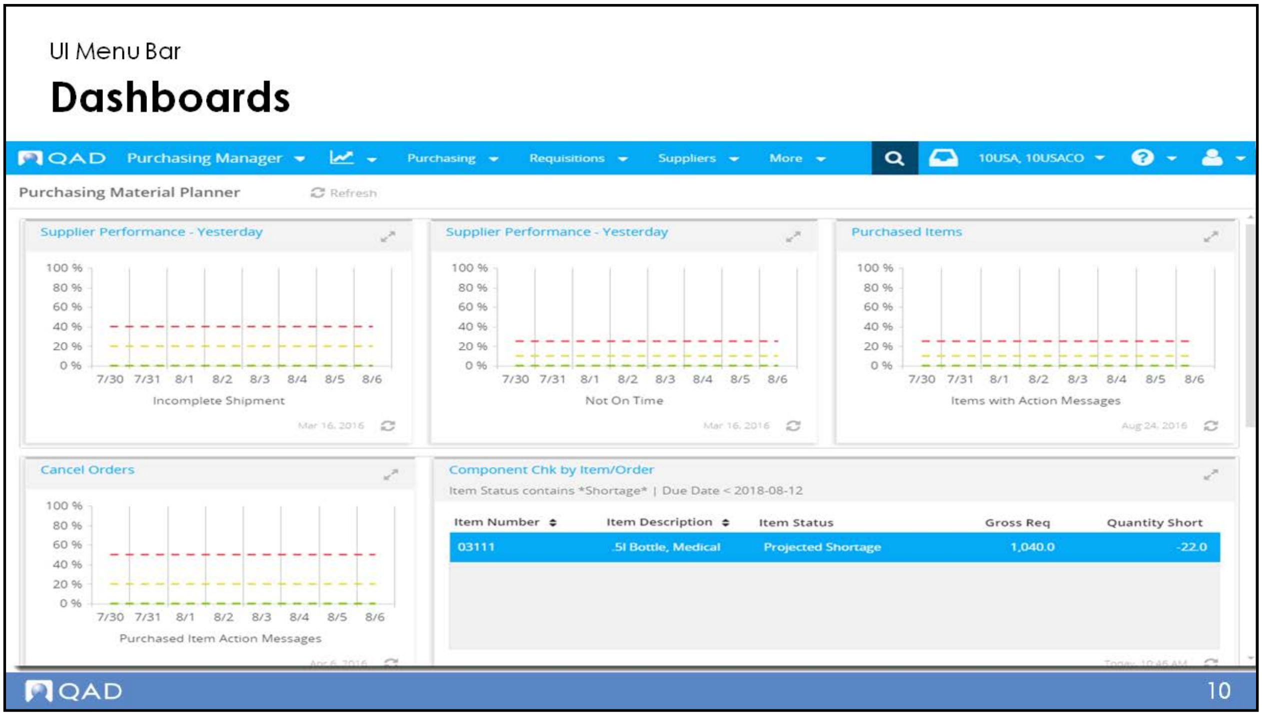
A dashboard brings together summaries of data, web pages, business intelligence, and operational metrics within panels. Each panel offers a quick summary; to find out more, you can expand the panel or click on the panel to open a view.

Choose a dashboard to view from the dashboard icon drop-down listing all the dashboards available to you.

Each role-based dashboard provides visual indicators of trends, inefficiencies, and outlying indicators to help users respond to immediate concerns and to develop long-term strategies.

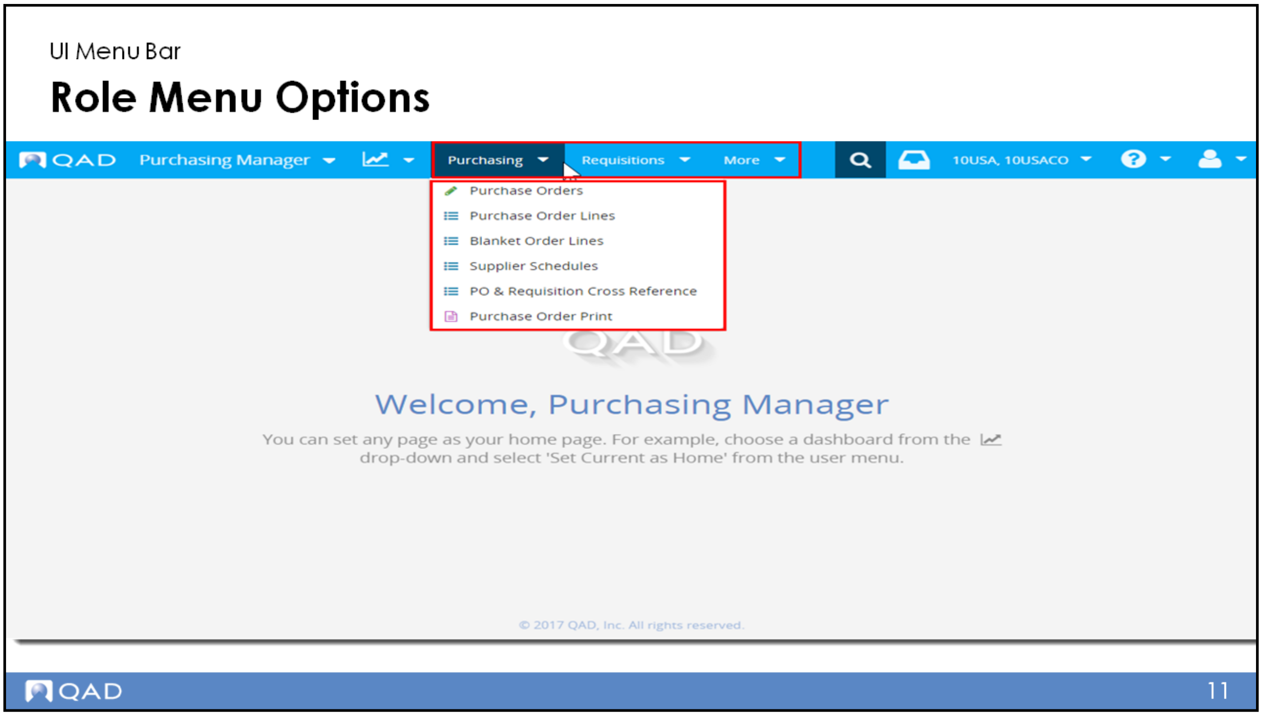
If you have been assigned more than one role, the available dashboards available to you do not change when you change roles. You always have access to the same set of dashboards regardless of your current role. Note that you can set a dashboard as your home page.

Dashboards



An example of Dashboards: Purchasing Material Planner.

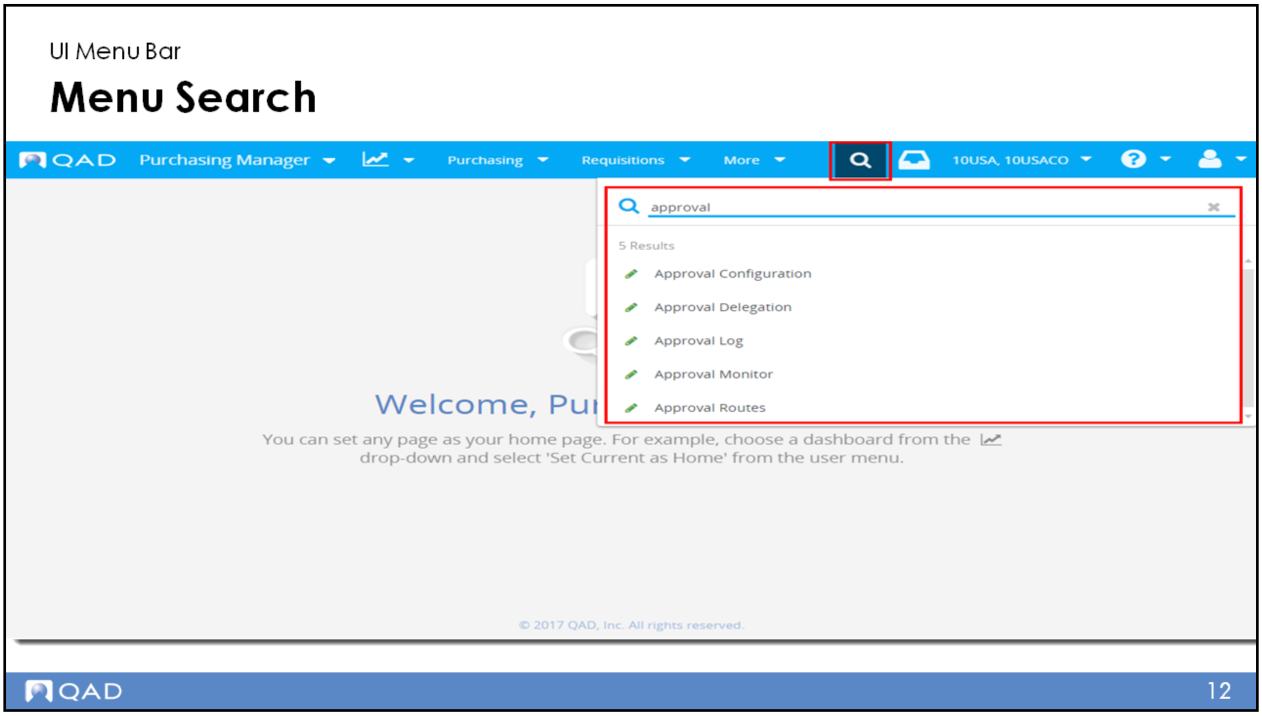
Role Menu Options



The selections here can vary depending on your current role, as selected from the role menu. For example, if your role is Purchasing Manager, the menu options include Purchasing, Customers, Requisitions, Suppliers, Purchasing Attributes, Receipts, and so on.

Click the menu option drop-down listing and choose a menu to work with the browses or view grids.

Menu Search



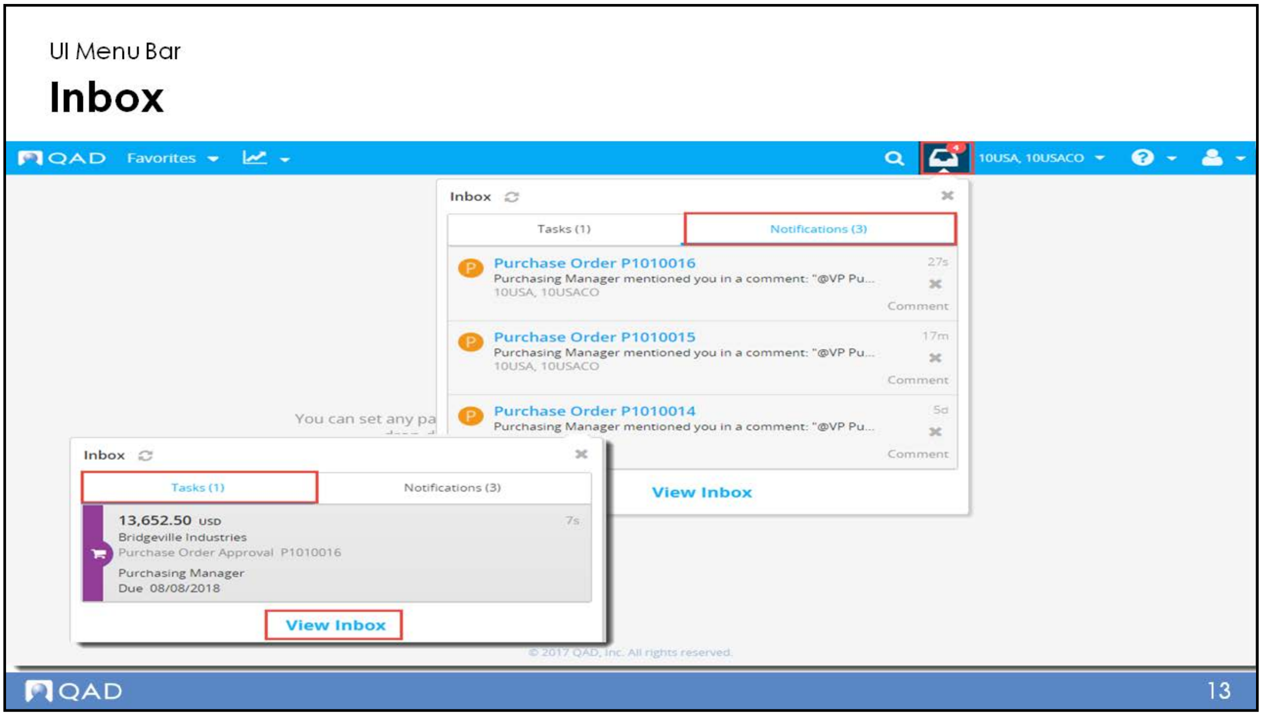
Use the menu search to find all the menu items available to you. The menu search features “type ahead” behavior so you can easily find items with similar names.

Icons indicate the menu item types, including browses, reports, and views.

You can set a menu item as a favorite directly from the listing of menu items, and see which are already favorites.

Note: The search listing is in alphabetical order, starting with the first letter of found matches. For example, if you type “items” in the search bar, the listing will not start with Items, as you might expect, but with “Container Items.”

Inbox



Click on the Inbox to see your messages. The Inbox lets you know of how many new messages you have with an indicator on the icon.

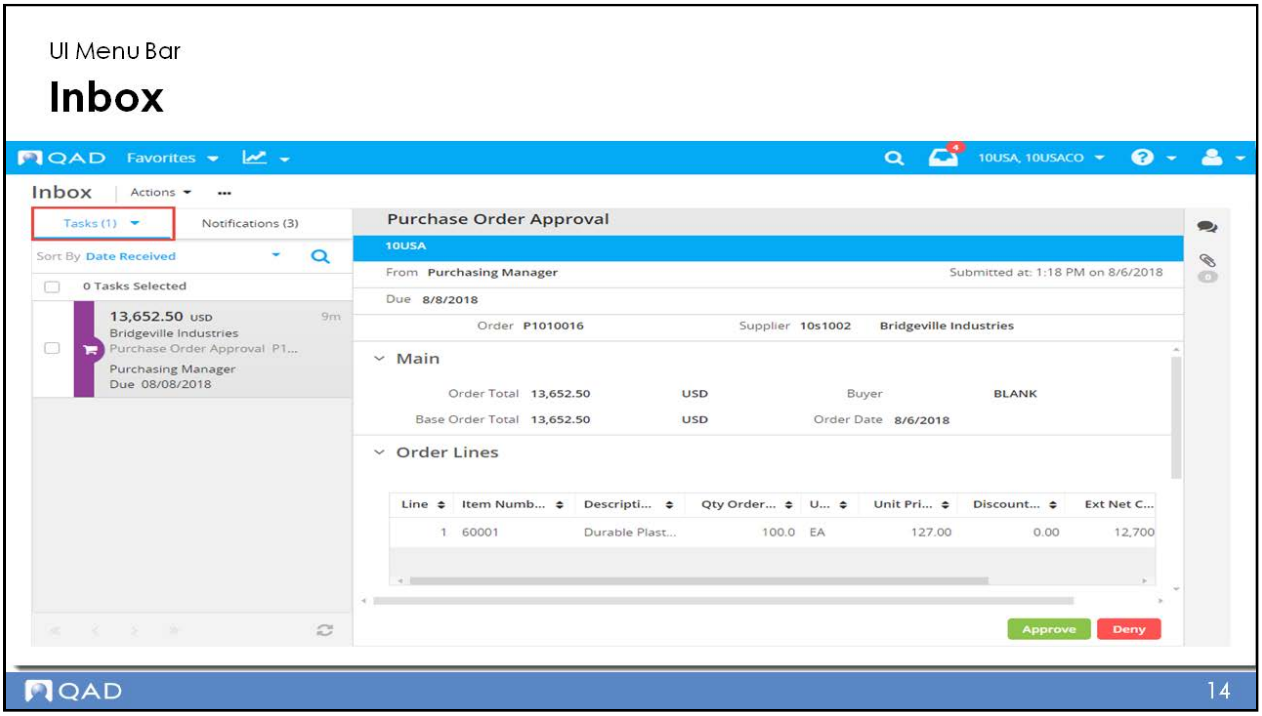
Inbox messages include Tasks and Notifications.

•Tasks include approval requests such as Requisition Approvals.

•Notifications indicate activity such as system events, comments from other users, and updates on transactions that you are following.

To view all task messages and notification messages, you can go to the Extended Inbox. To go to Extended Inbox, click View Inbox.

Inbox



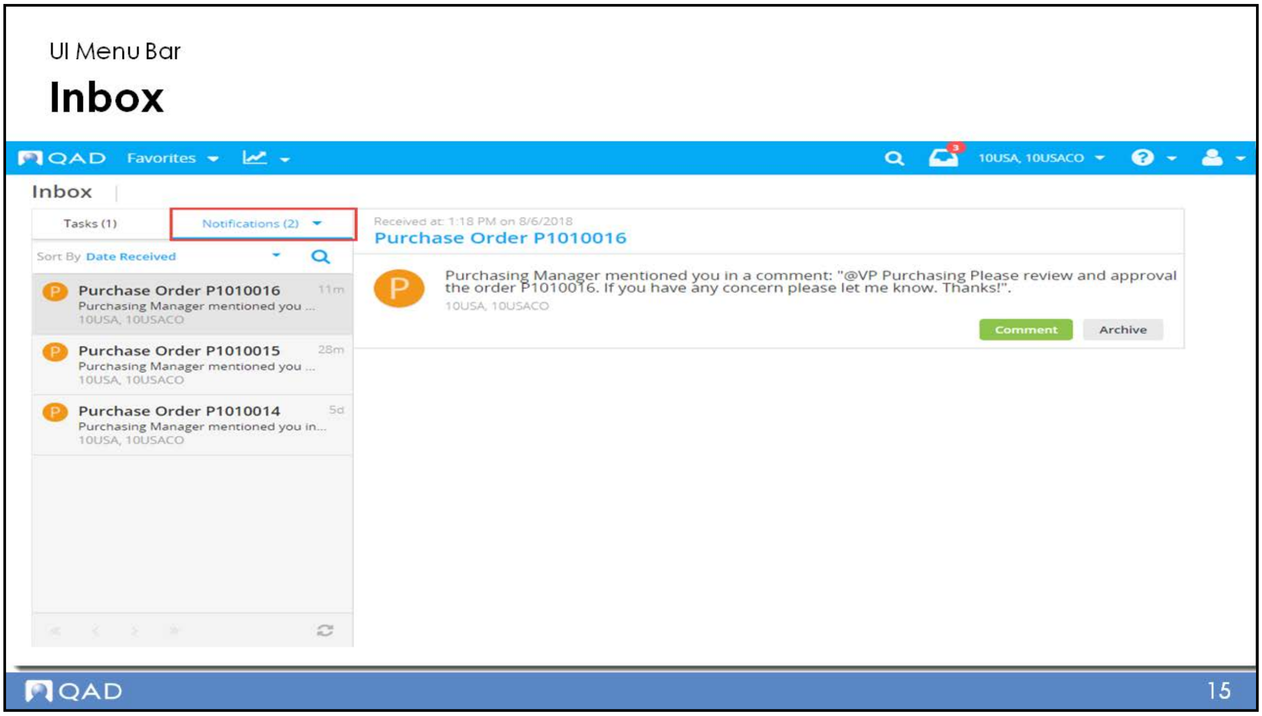
On the Task tab in the Extended Inbox, the system displays all the active tasks by default. You can sort the task messages by Date Received, Due Date, From, or Domain. You can also filter the messages by clicking the lookup browse icon and using searching conditions.

Click a specific task message in the list, and the system displays the approval screen to the right. You can approve, deny, or route the approval request. When you approve or deny a request, you can enter your comments on the request and also update the editable fields. To route the approval request to another user, click the More button and choose Route. When you route the approval request, you can also enter your remarks.

You can approve or deny the approval requests in bulk. To do a mass approval, select the boxes at the beginning of all the listed approval requests that you want to handle. And then from Actions, choose Approve to approve all the selected requests. Choose Deny to deny all the selected requests. You can also give your comments when you approve or deny.

You can view archived tasks by clicking the small drop-down arrow button beside Tasks. Archived tasks show all tasks that are completed by you. You cannot take any action on these tasks. To switch from Archived Tasks back to Active Tasks, click the small triangle drop-down button beside Tasks.

Inbox

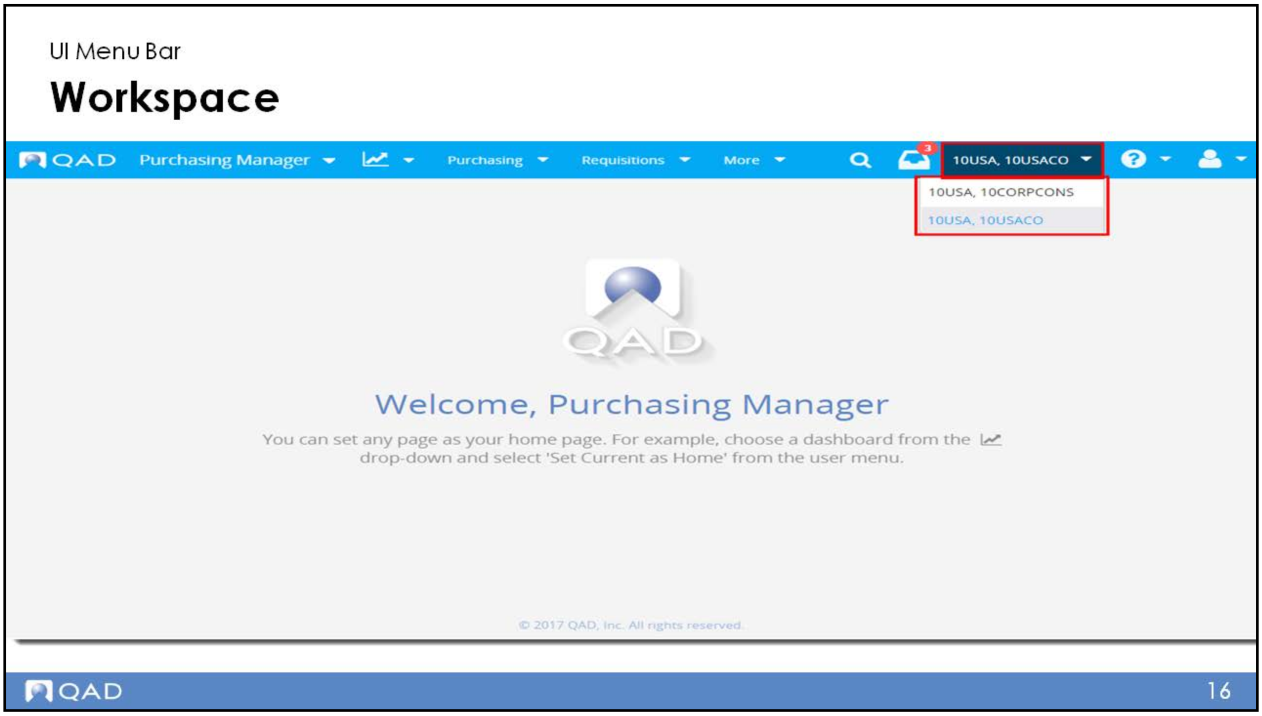


On the Notifications tab in the Extended Inbox, the system displays all the active notifications by default. You can sort the notification messages by Date Received or Workspace. You can also filter the messages by clicking the lookup browse icon and using search conditions. For example, you can search by From and enter System to search the notifications that are not generated from user activities or comments. An example of this kind of notification is a notification to show that an approval request has been approved.

Click a specific notification message in the list, and the system displays the details page to the right. You can comment on the notification message, or archive it. If the notification is about a report for downloading, the system displays the Download button instead of the Comment button. To download the report, click Download.

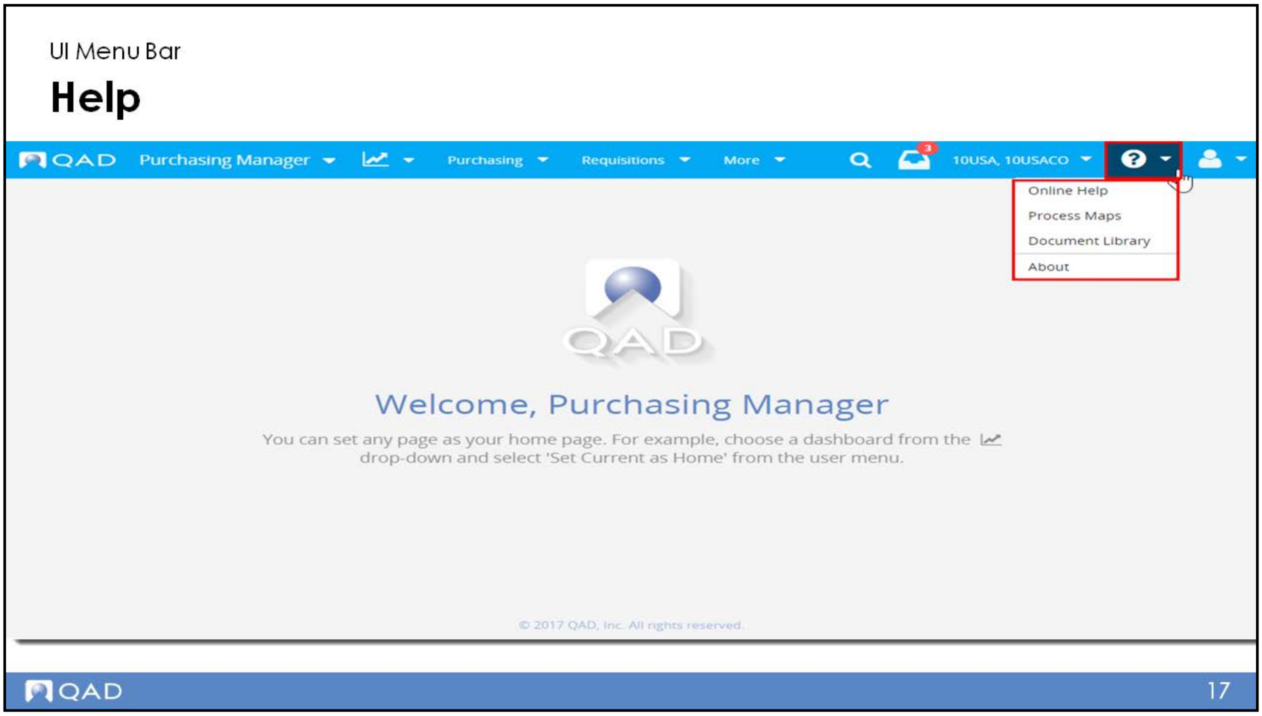
You can view archived notifications by clicking the small triangle drop-down button beside Notifications. Archived notifications show all notifications that are archived. You can still comment on the notifications. To switch from Archived Tasks back to Active Tasks, click the small drop-down arrow button beside Tasks.

Workspace



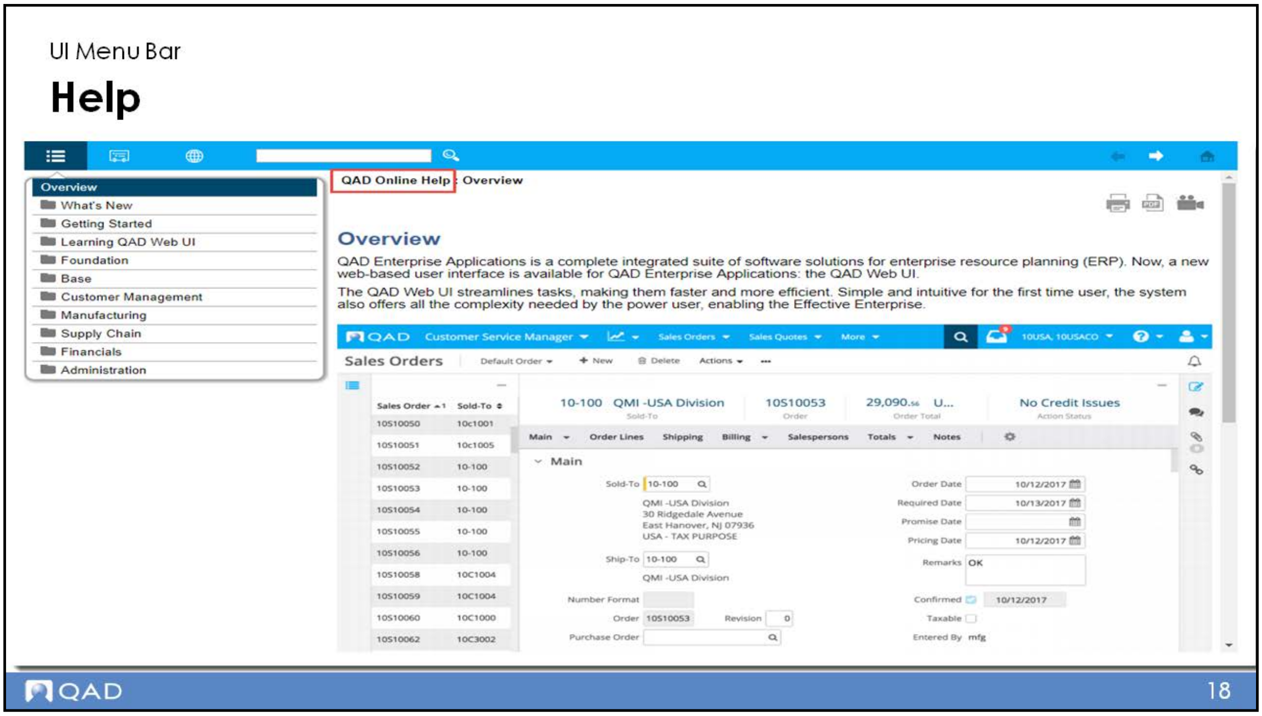
Choose the workspace from the drop-down list of workspaces available to you, where workspace is the domain and entity within which you are working. Changing workspaces applies to all browser tabs running the QAD Channel Islands UI. Be sure you have saved your work in all the tabs before changing workspaces. When you change workspaces, the system will prompt you to confirm that you are ready to change workspaces.

Help



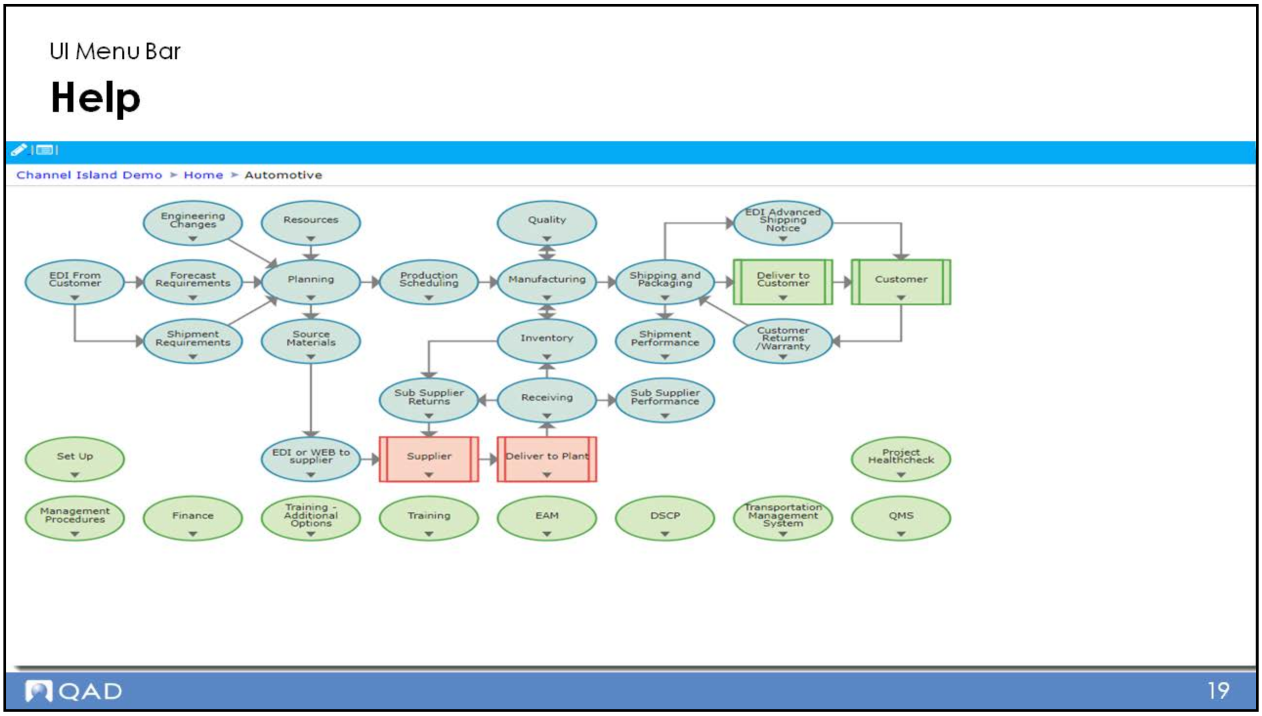
From the help drop-down, you can view the online help, open process maps, and access the QAD Document Library.

Help



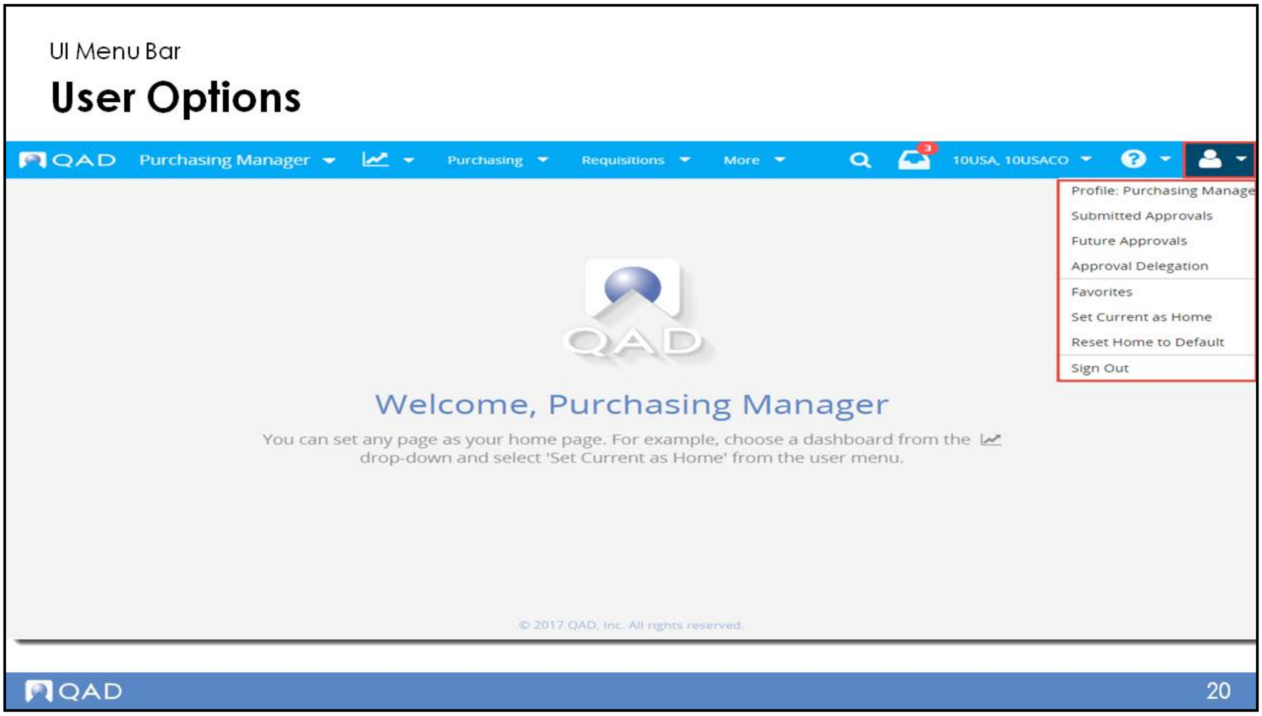
From the help drop-down, click Online Help and go to QAD Online Help web page.

Help



From the help drop-down, click the Process Map and go to QAD process maps.

User Options



From the user options icon drop-down, you can:

- View your user profile settings and change your language and locale

- Review submitted approvals and set approval delegation

- View and organize your favorites

- Set the current page as your home page or reset to the default home page

- Sign out of the QAD Channel Islands UI

Note: A detailed explanation of these functions will be covered during a combination of the Administration and Navigation sections of the course.

Review

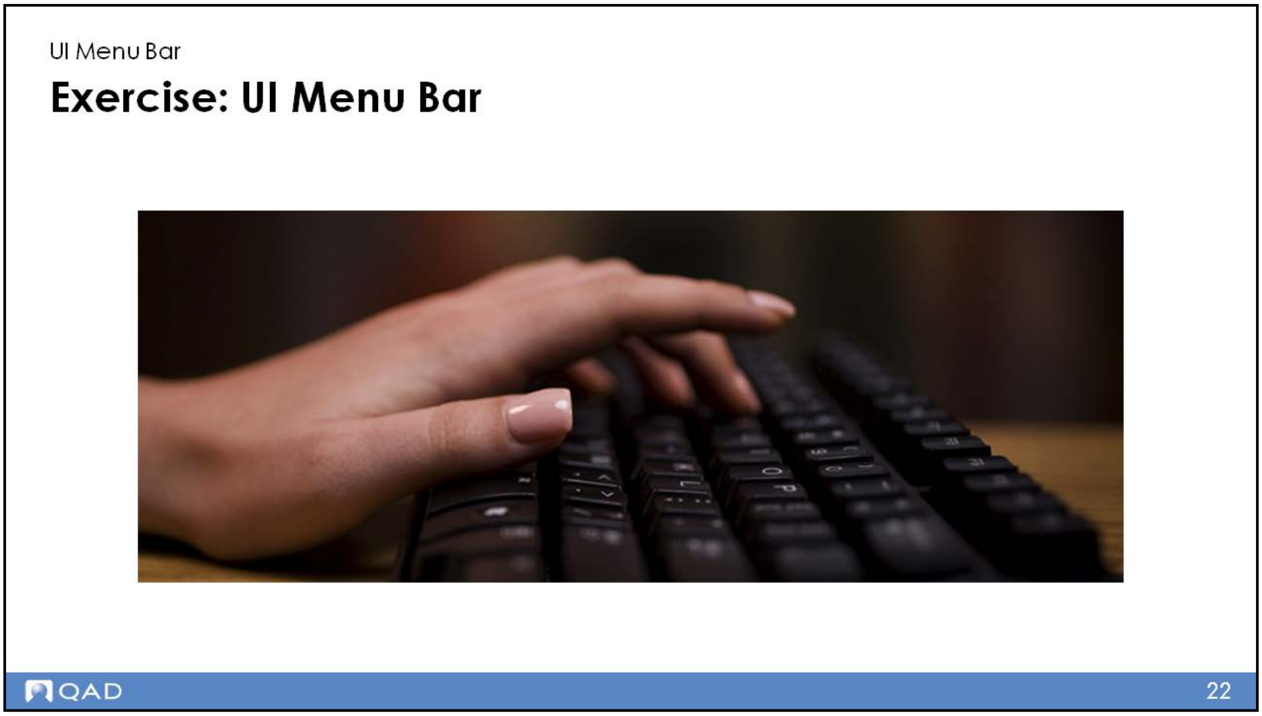
UI Menu Bar

Review

- Signing In
- Introduction to the Web UI
- Menu Bar
- Role Menus
- Action Centers
- Dashboards
- Inbox
- Menu Search
- User Options

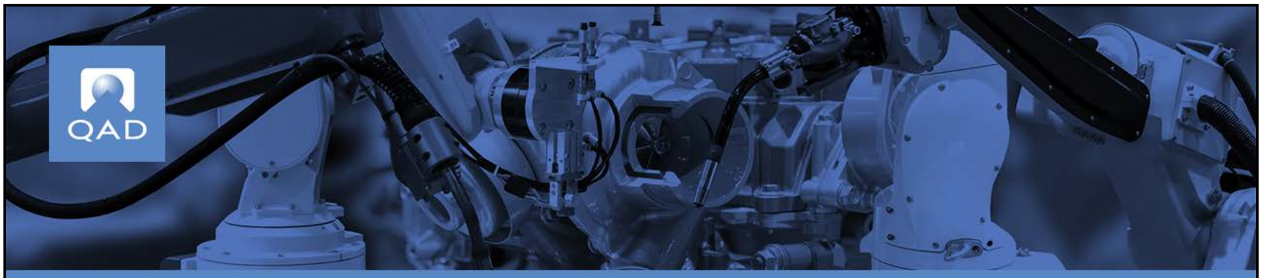
QAD 21

Exercise: UI Menu Bar



CHAPTER 3

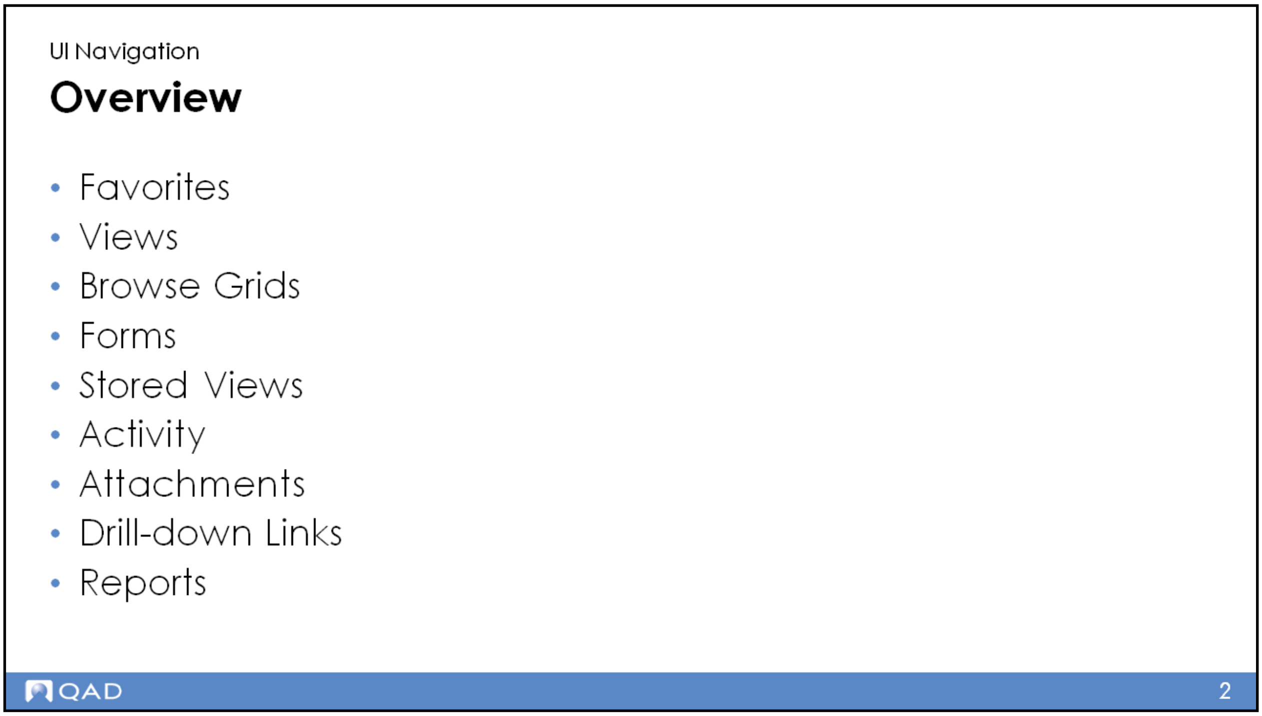
UI Navigation



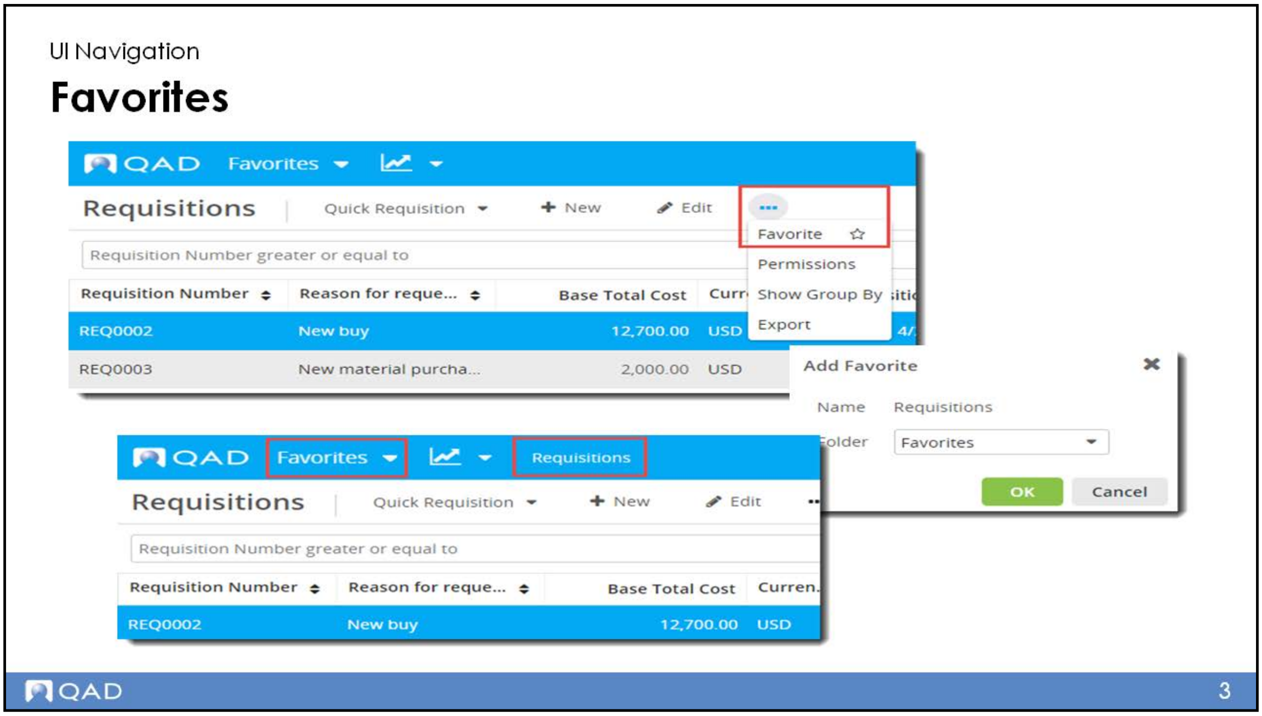
UI Navigation

CI Quick Start

Overview

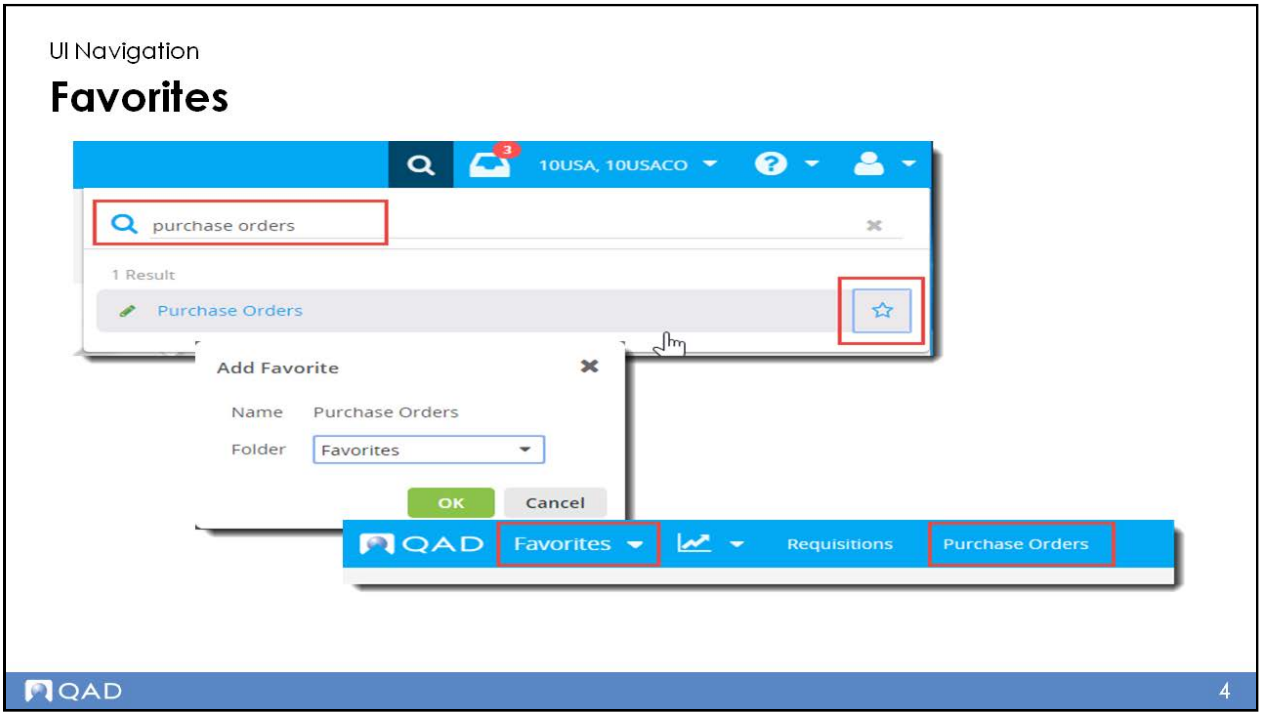

UI Navigation
Overview
Favorites
Views
Browse Grids
Forms
Stored Views
Activity
Attachments
Drill-down Links
Reports
2

Favorites



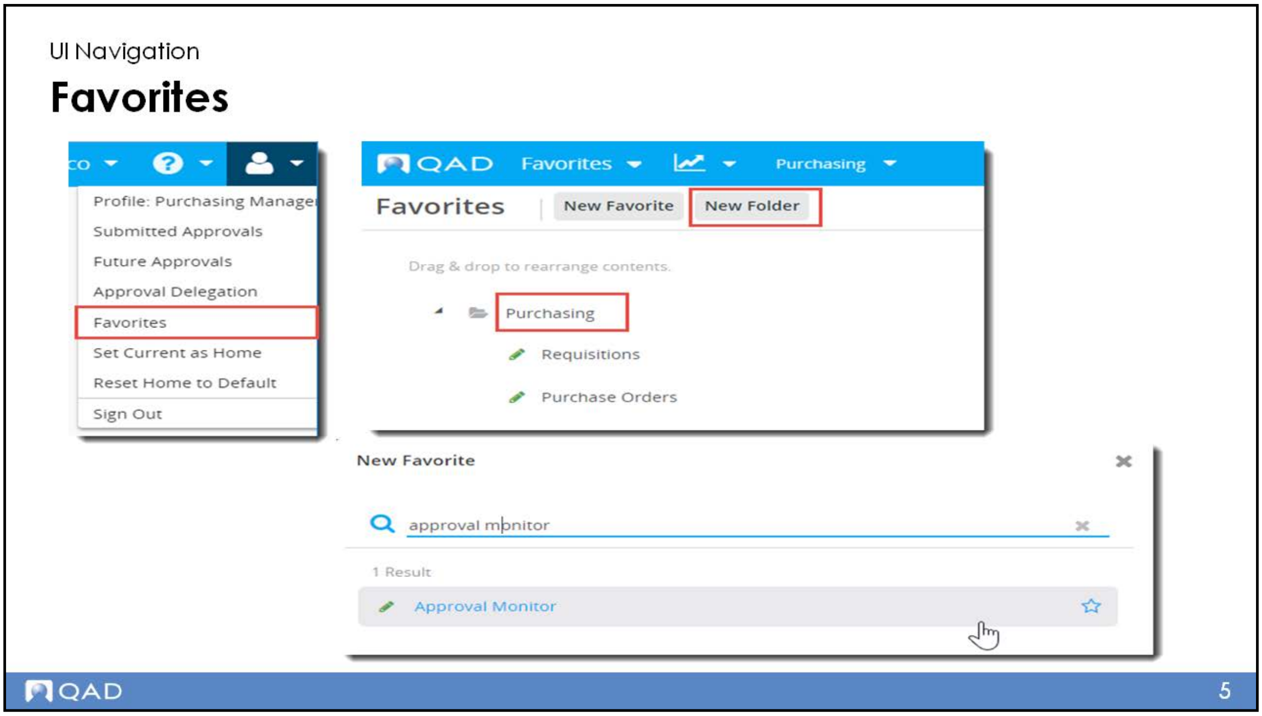
You can save a menu item as a favorite, and easily access your favorites from the menu bar. On a menu item where you are currently working, you can save it as a favorite by selecting Favorite from the ellipsis icon.

Favorites



You can also set a menu item as a favorite from the menu search results.

Favorites

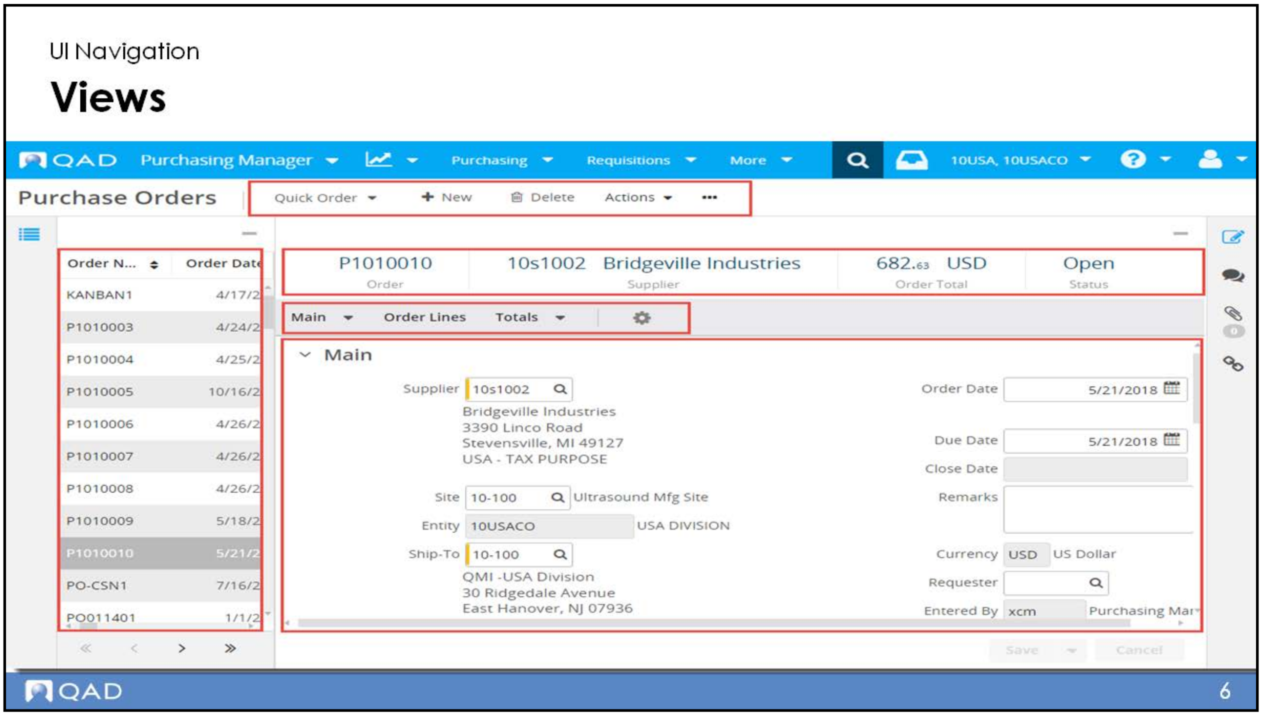


To manage your favorites and organize them into folders, from the user options drop-down menu, choose Favorites, located at the bottom of the listing.

From here, you can add new folders by selecting New Folder. The folders you create will become the menu bar option drop-downs. You can drag-and-drop your favorites and organize them into folders. The changes you make here specify the order and hierarchy of how your favorites display in the menu bar.

Select New Favorite to open the menu search and find menu items you want to set as favorites.

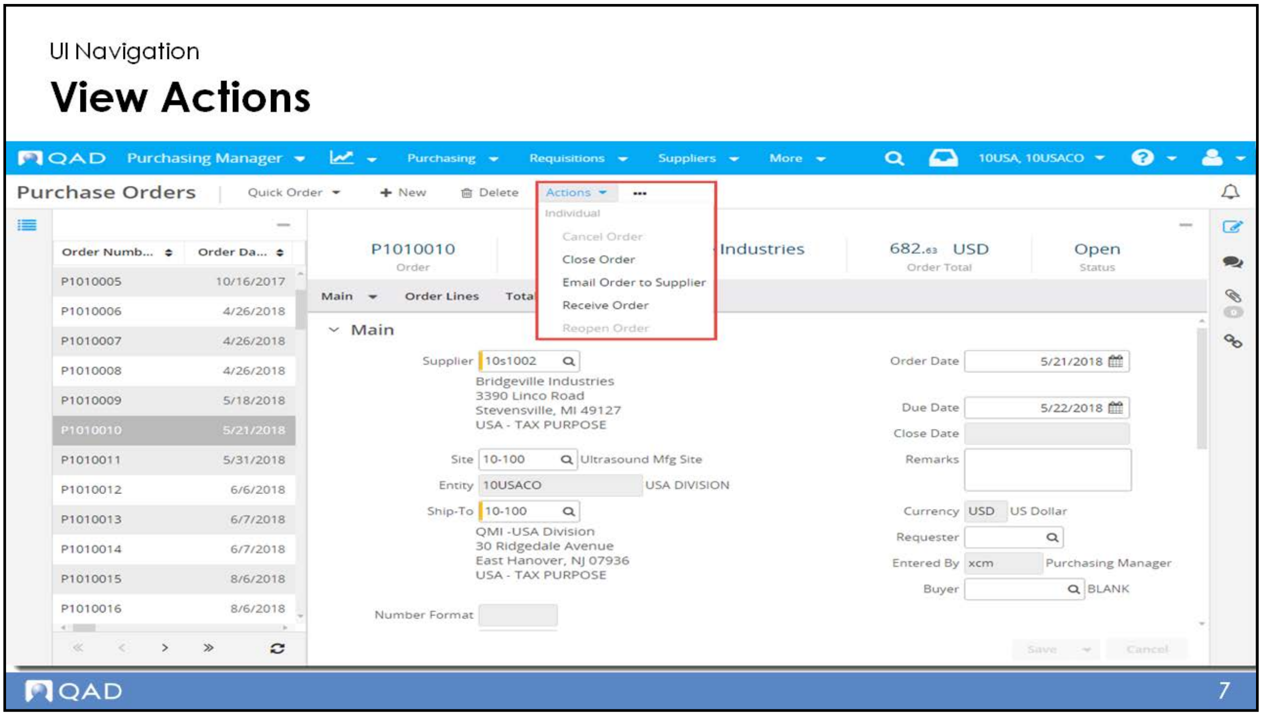
Views



A view includes a toolbar along the top, a grid (or browse) displaying a list of records, and a form for completing work. Because views combine forms and browses, they are also called hybrid views.

The form organizes everything you need on a single page, typically starting with a summary panel at the top. Related fields and functions are grouped within panels. The navigation bar, located just below the summary panel, allows for quick access to any panel of interest. You can quickly access anything on the form by scrolling or using the navigation bar.

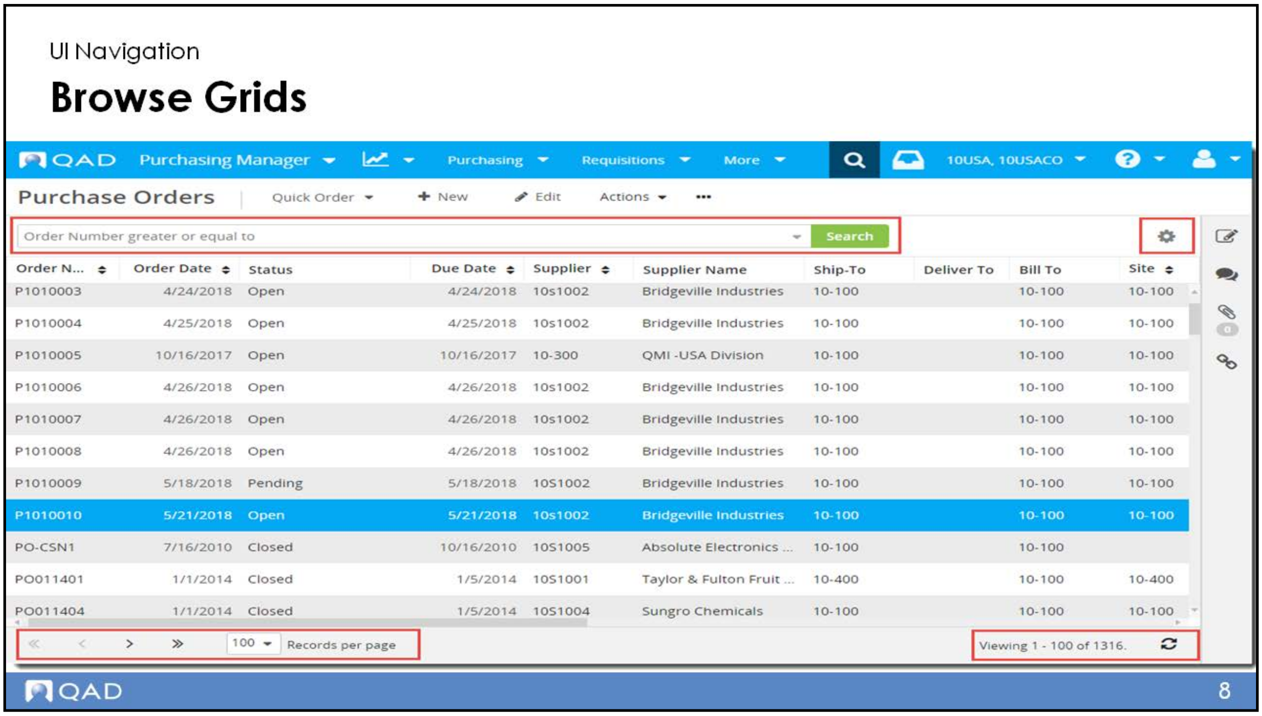
View Actions



A view may include an Actions toolbar in the top, and you can take some actions on the individual record.

For example, based on the purchase order status, you can cancel an order, receive an order, close an order, or reopen an order.

Browse Grids

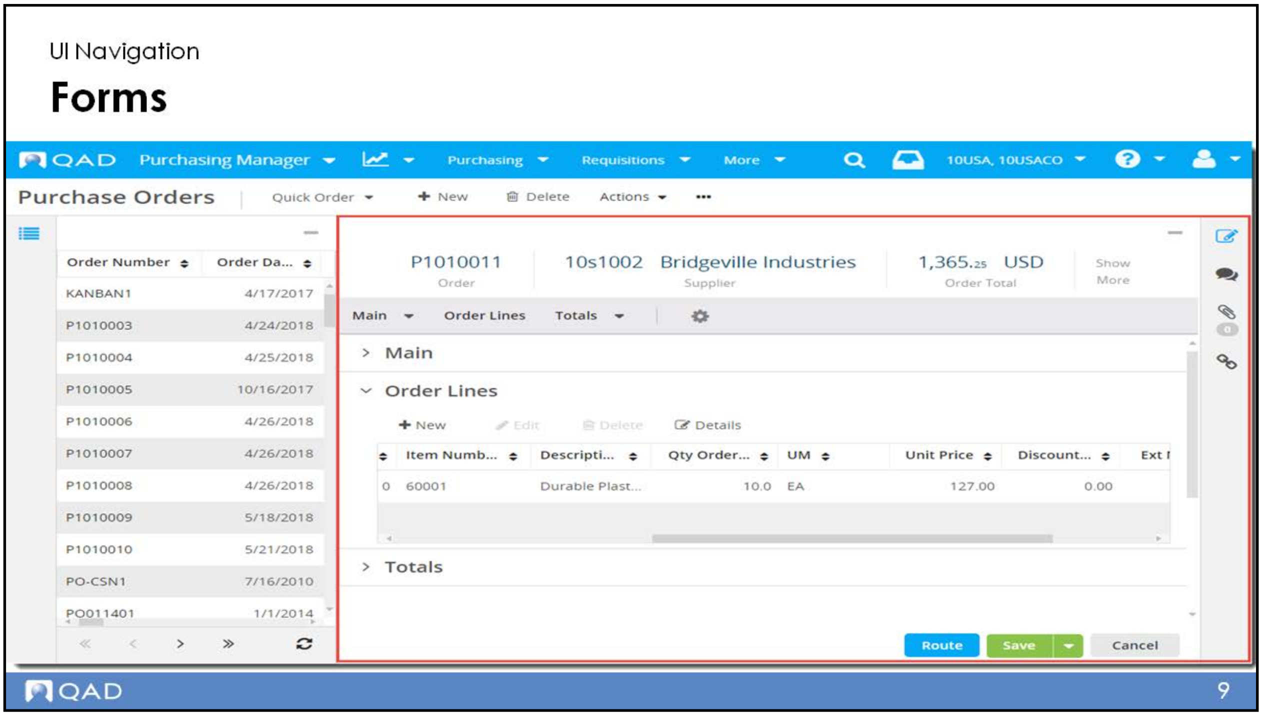


When you first open a view, the browse grid displays records in rows.

Browses include the following features:

- Quickly search for data or add search conditions
- Sort on columns
- Use paging controls along the bottom of the grid display
- Hide and show columns with configuration settings
- Save column configurations as part of a stored view
- Save search filters as stored searches

Forms



In a form, you create, view, edit, and delete record data. The form displays when you double-click on a row (a record) in an editable view grid. A form includes a summary panel, navigation bar, main panel, and then various detail panels and sub-panels.

The summary panel displays key data about the form so that you know what you’re working on at a glance. The summary panel is located between the menu bar and the navigation bar. These fields are read-only and stay in view even when you scroll down the page.

The navigation bar summarizes the various panels on the form, with drop-downs for the sub-panels. Use the navigation bar to jump quickly to any panel on the form.

The configuration (gear) icon on the navigation bar provides a dialog where you can control the display of panels on a form.

The main panel is the first panel located below the navigation bar. The main panel includes the most pertinent fields and controls, while the detail panels (and sub-panels) bring together various supporting fields and controls.

A form grid is a grid located in a form’s panel that lists data you can edit. The Channel Islands UI includes two types of form grids:

•Single-row edit grid — only one row at a time can be edited.

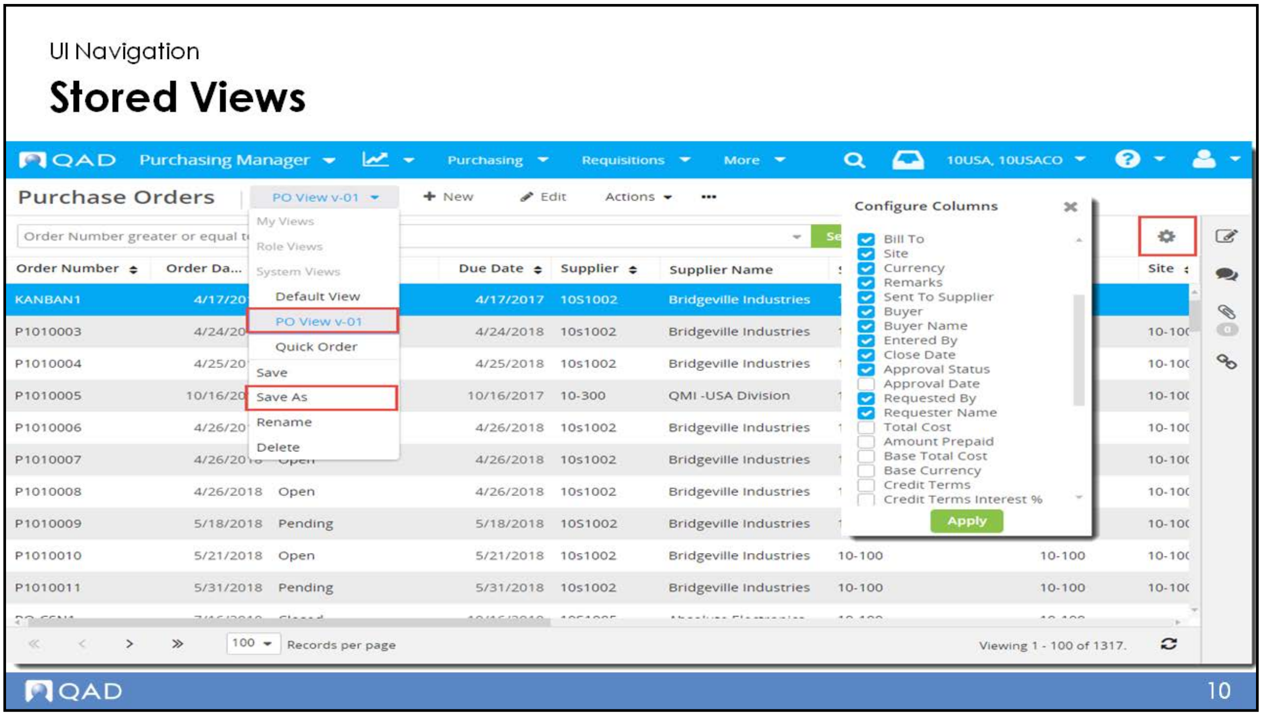
•Multi-row edit grid — multiple rows can be edited at a time.

The form footer is the area along the bottom of the form. This area includes buttons for saving and canceling changes you have made on the form:

•Save — the Save button becomes active when you have made changes that need saving.

•Save & Next — Clicking Save & Next saves the current form and then moves to the next grid (browse) record so you can continue your work without having to explicitly open the next record. If you are on the last record, clicking Save & Next will start a new record for you.

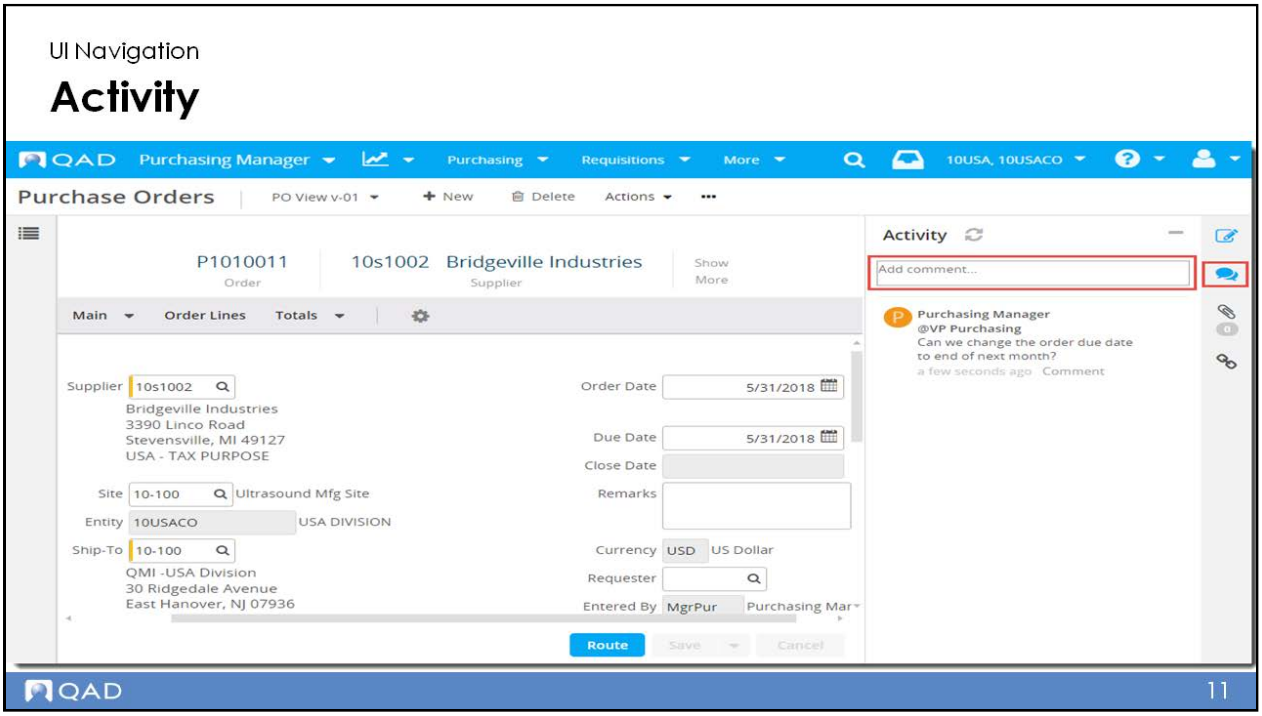
Stored Views



You can modify a view and then save it for later use as a stored view. Aspects of a view you can modify include the grid columns, grid search conditions, and form panels. After configuring a view, you can save it as a stored view from the drop-down located next to the view title. Once saved, a stored view is available from a pull-down menu located next to the view title.

Stored views can be made available just to you, can be shared with selected roles, or can be made available to everyone on the system.

Activity

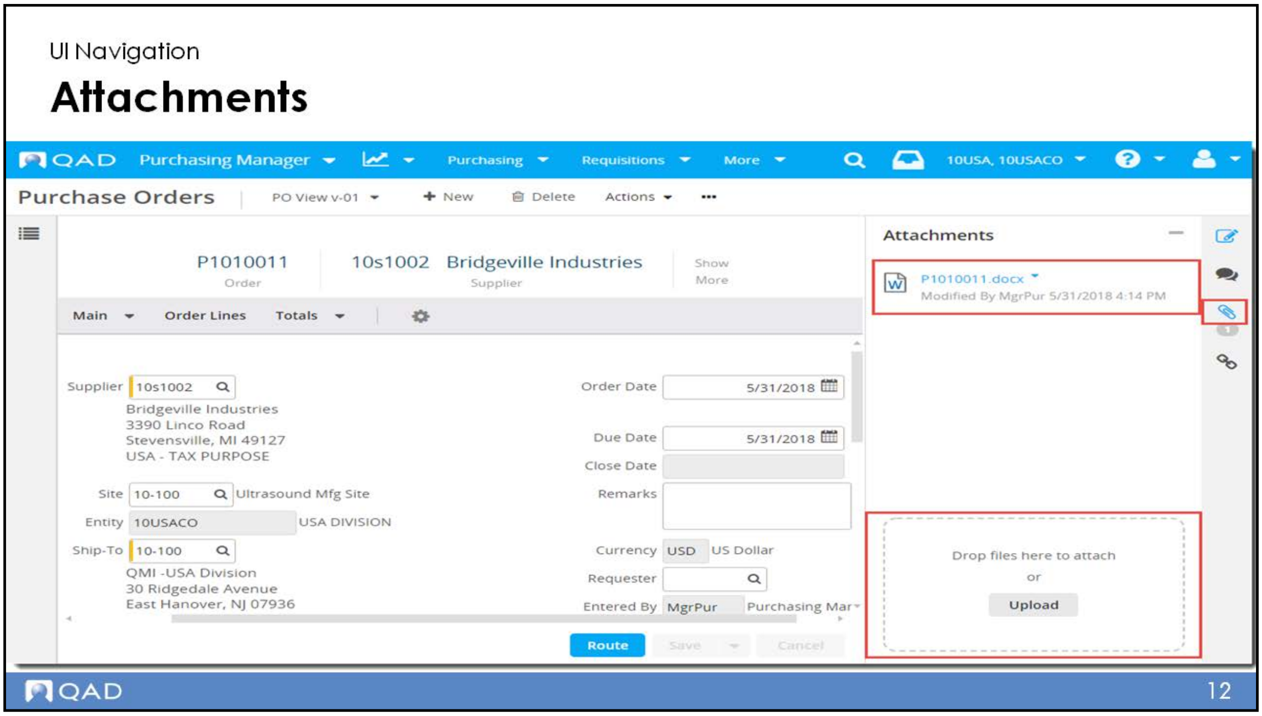


From a form, open the Activity panel on the right side of the page by clicking on the Activity icon along the right. You can comment on activity in a way similar to how you use social media.

You can add comments directly to the activity feeds, and mention the names of other uses in the comments by first typing the @ symbol.

Tagged users receive Inbox notifications that they have been mentioned in a comment. They can then go directly from their Inbox notification to the form and its activity panel. They can also simply reply to the Inbox notification.

Attachments



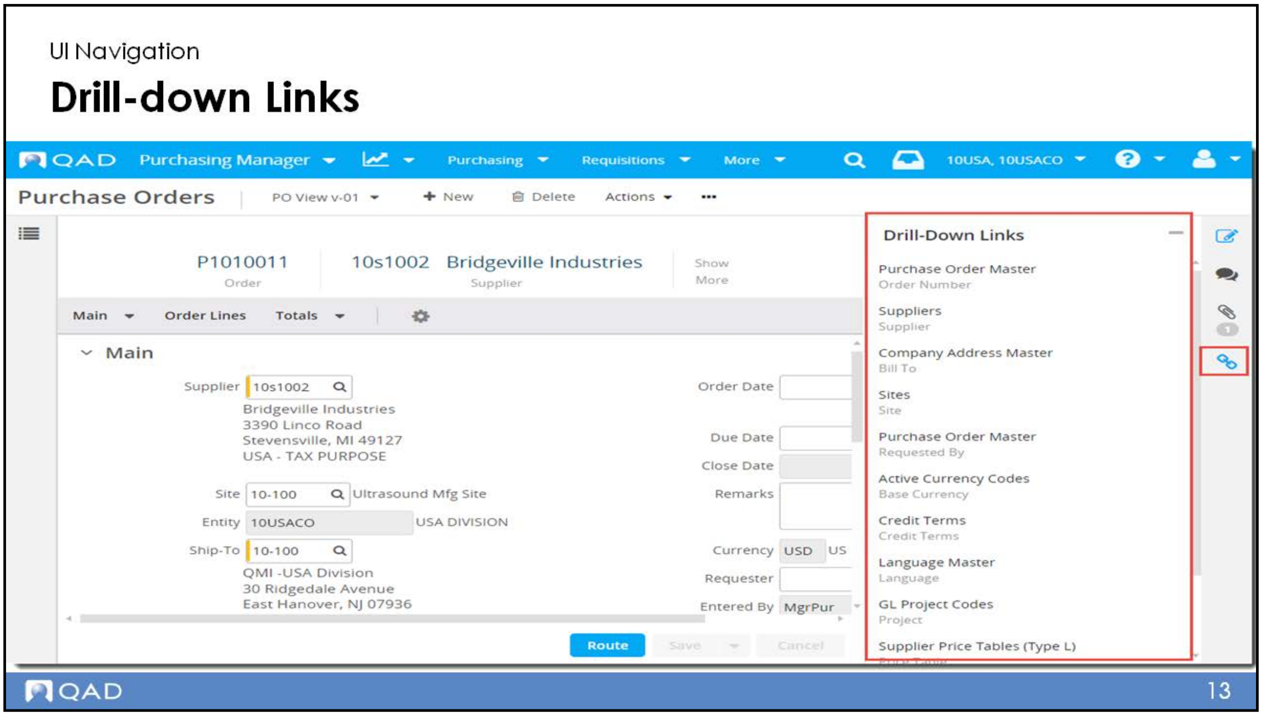
You can attach files to views to keep relevant documents together for a particular transaction. For example, you can attach spreadsheets, Word documents, and PDFs to a purchase order.

To attach a file, open the attachments panel by clicking on the paperclip icon. Drag the attachment to the attachments drop area, or click Upload to select the attachments.

To view an attachment, in the Attachments panel, click on the attachment title to download and view the file.

Right-click on the attachment to delete the attachment, view its properties, or download it.

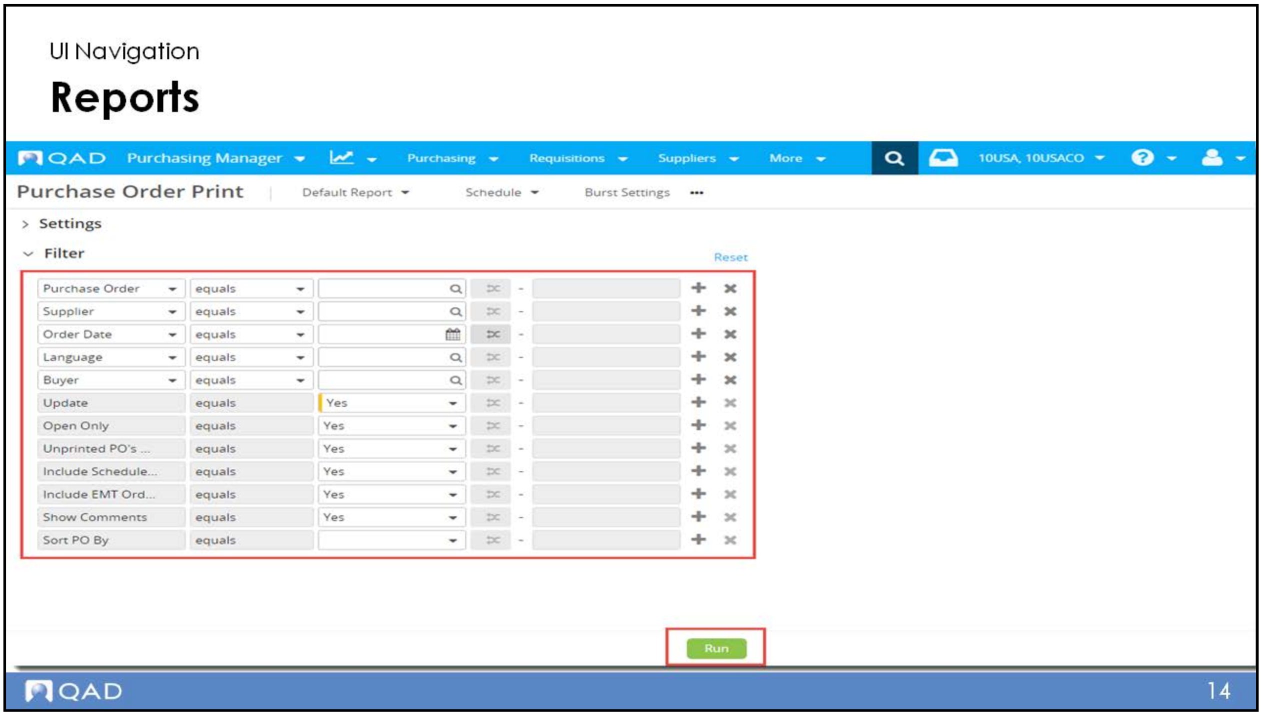
Drill-down Links



Selected views such as Purchase Orders include the drill-down links feature. By clicking on the link icon located on the right side of the view, you can quickly access browses related to data in the currently selected record.

For example, if you have Purchase Orders open and are working on a particular order, you can quickly open the Supplier browse for the supplier of the order.

Reports



You can run reports using the report viewer. When you first open a report, complete the Settings and Filter panels. Next, click Run to run the report right away, or schedule the report to be delivered in your Inbox using Schedule > Schedule Report.

Some reports can take time to render. After you click the Run button, a new tab opens with options for viewing the report or having the report sent to your Inbox.

You can save a report with its current settings and filter by using the stored reports drop-down option.

Review

UI Navigation

Review

- Favorites
- Views
- Browse Grids
- Forms
- Stored Views
- Activity
- Attachments
- Drill-down Links
- Reports

QAD 15

Exercise: UI Navigation

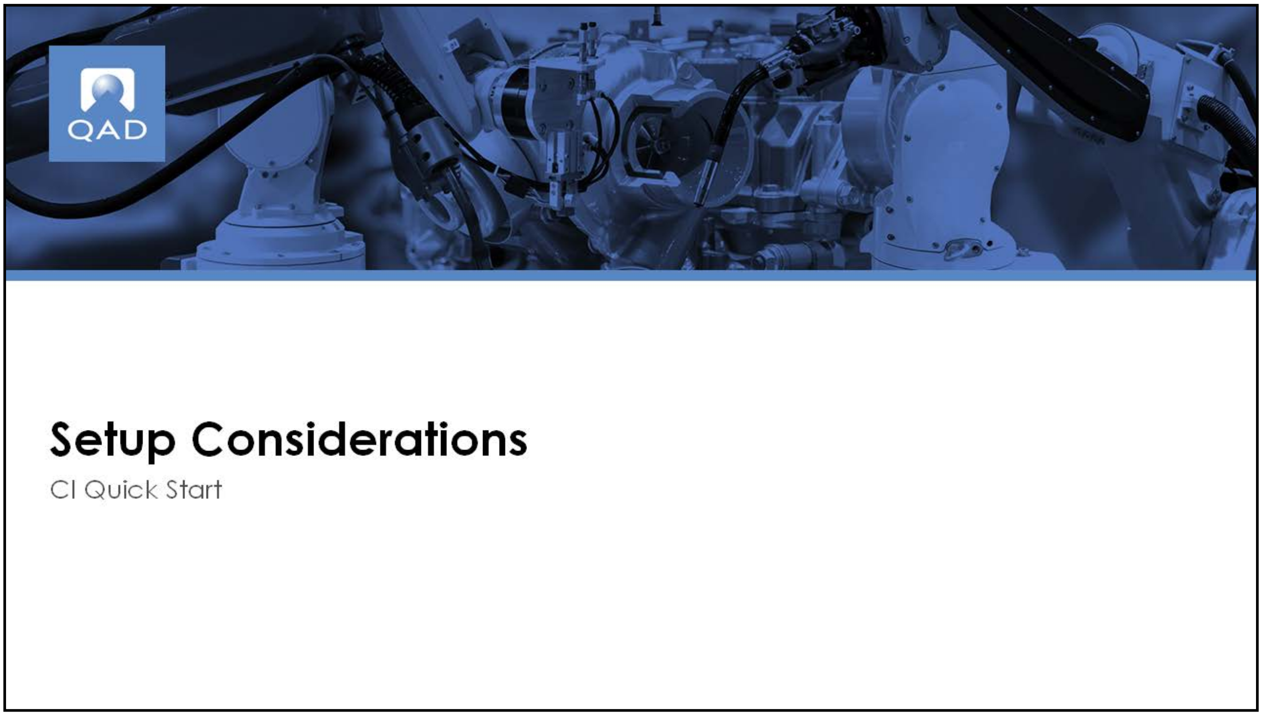
UI Navigation

Exercise: UI Navigation

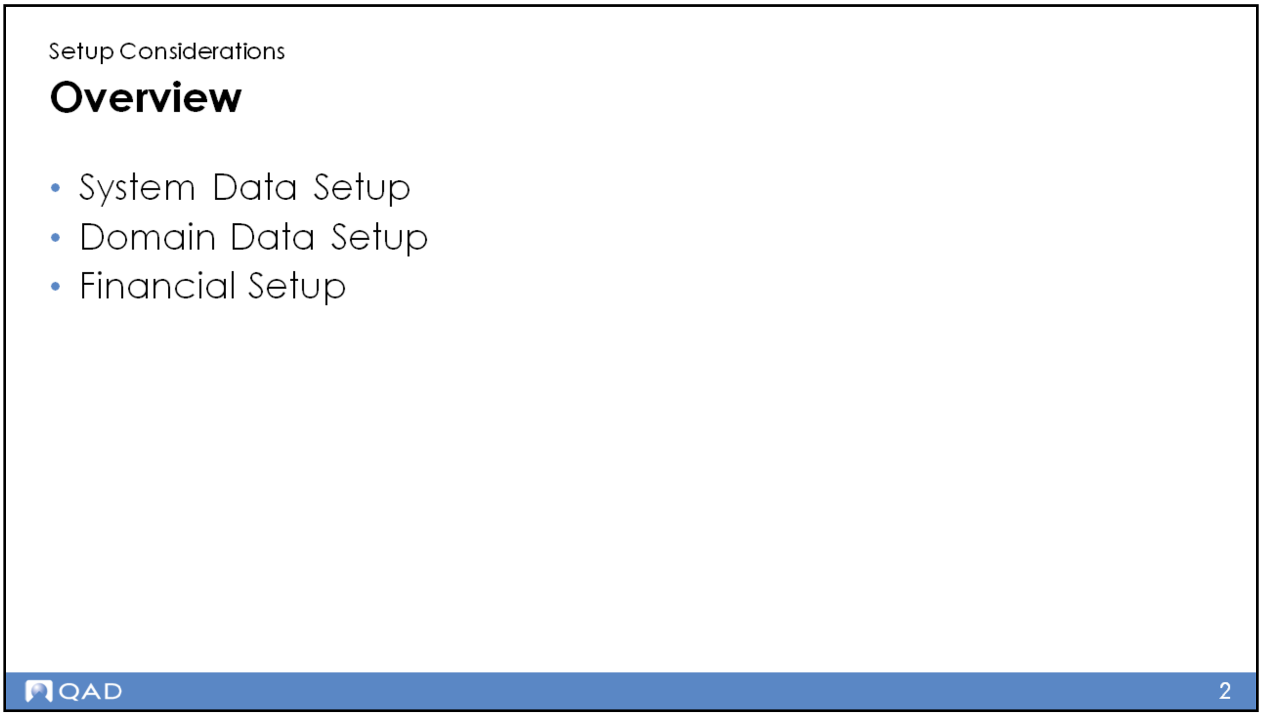
QAD 16

CHAPTER 4

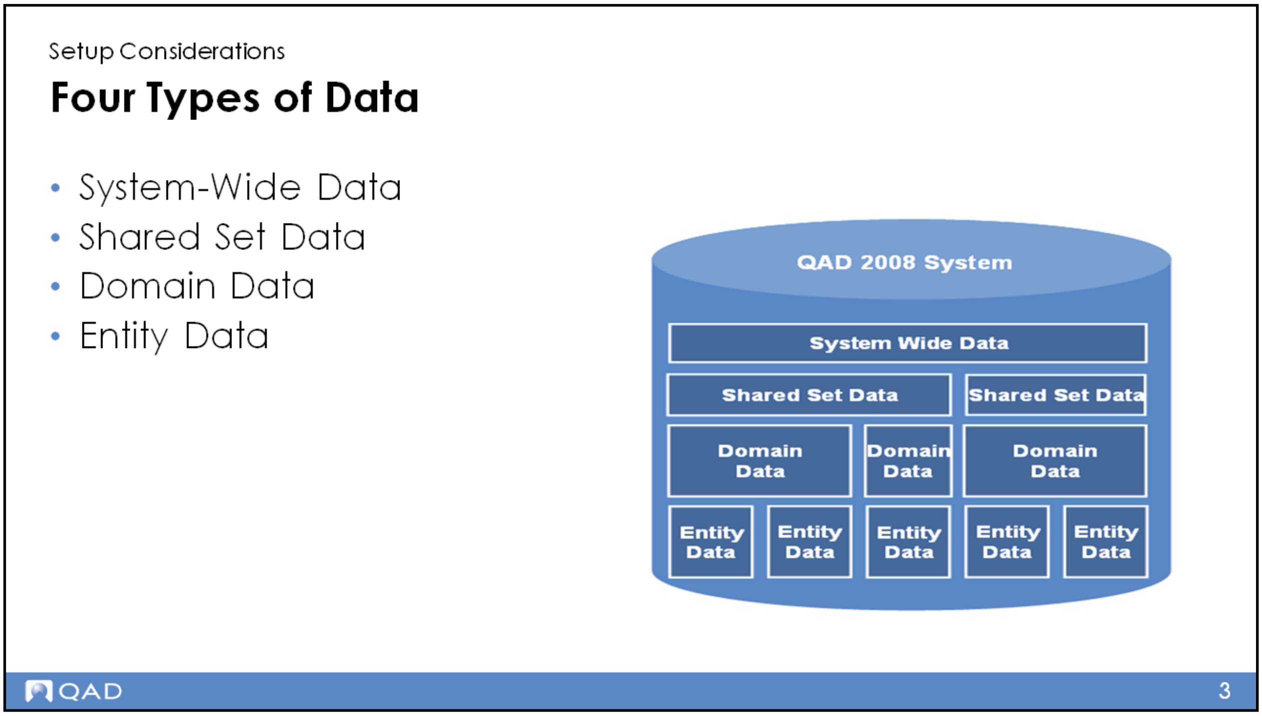
Setup Considerations


QAD
Setup Considerations
CI Quick Start

Overview


Setup Considerations
Overview
System Data Setup
Domain Data Setup
Financial Setup
QAD
2

Four Types of Data



Business Data Summary

Setup Considerations

Business Data Summary

Level	Category	Detailed Data Types
System-wide	Business relations and address-related data	• Address types, corporate groups, currencies, rounding methods, languages, counties, countries, states
	Address-related tax data	• Tax zones, tax environments, tax classes, tax usage codes, tax types
	Financial codes	• Shared set codes, credit terms, invoice statuses, profiles, and Supplementary Analysis Fields (SAFs)
	Security data	• Users, roles
	Administrative data	• E-mail definitions, printers, some EDI and eCommerce setup data
	User interface data	• Labels, menus, messages, lookup definitions

QAD 4

Business Data Summary

Setup Considerations

Business Data Summary

Level	Category	Detailed Data Types
Shared sets	Financial data Business relations	• Accounts, sub-accounts, cost centers, projects, daybooks, exchange rates • Customers, suppliers
Domain	Financial data Operational data Orders	• COA mask (combination of account/sub-account/cost center/project), GL periods • Sites, locations, items, default accounts, generalized codes • Purchase orders, sales orders, work orders, distribution orders, service calls
Entity	Financial data	• Employees • Bank account numbers • Period closing statuses • General ledger and sub-ledger transactions and balances • Transaction numbering

QAD 5

System Data Setup in .Web UI

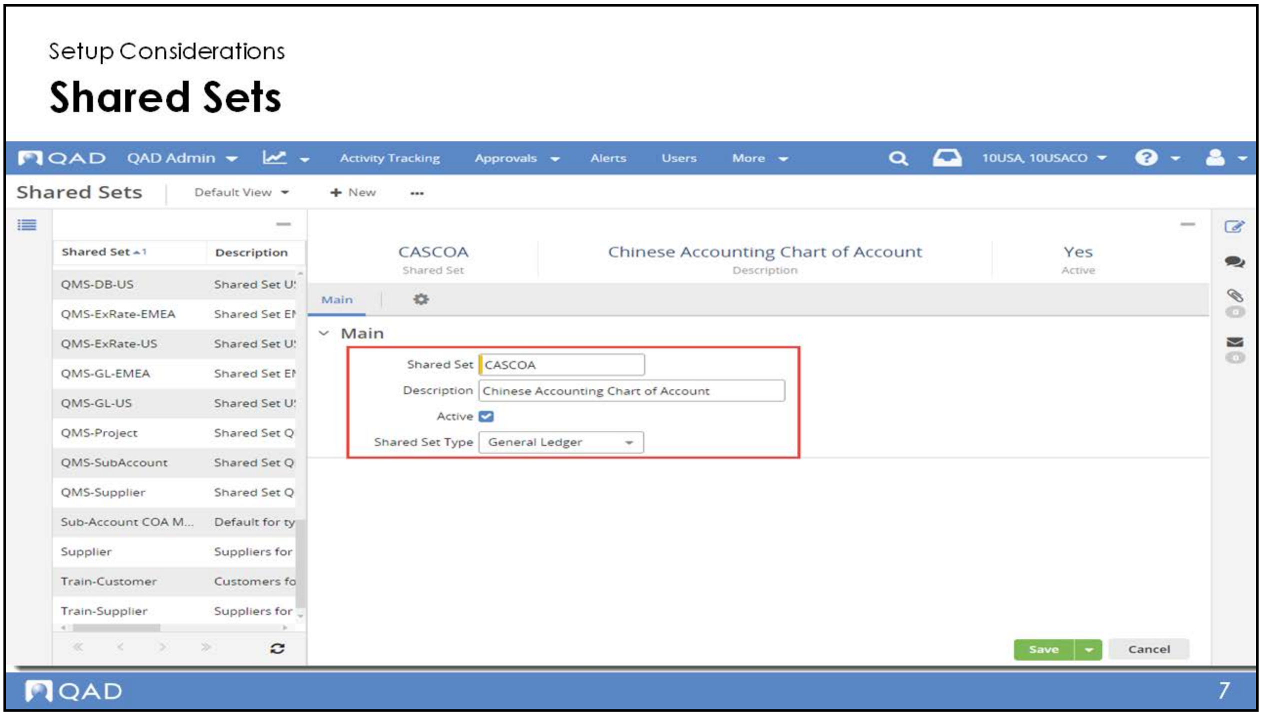
Setup Considerations

System Data Setup in .Web UI

- Address Types
- Corporate Groups
- Currencies
- Rounding Methods
- Languages
- Counties
- Countries
- States
- Users
- Roles
- SAFs
- SAF Concepts
- SAF Structures
- Shared Sets
- Credit Terms

QAD 6

Shared Sets



Shared sets provide great flexibility in how a system can be set up. Default shared set codes are supplied with the system. However, you can create as many shared sets as necessary.

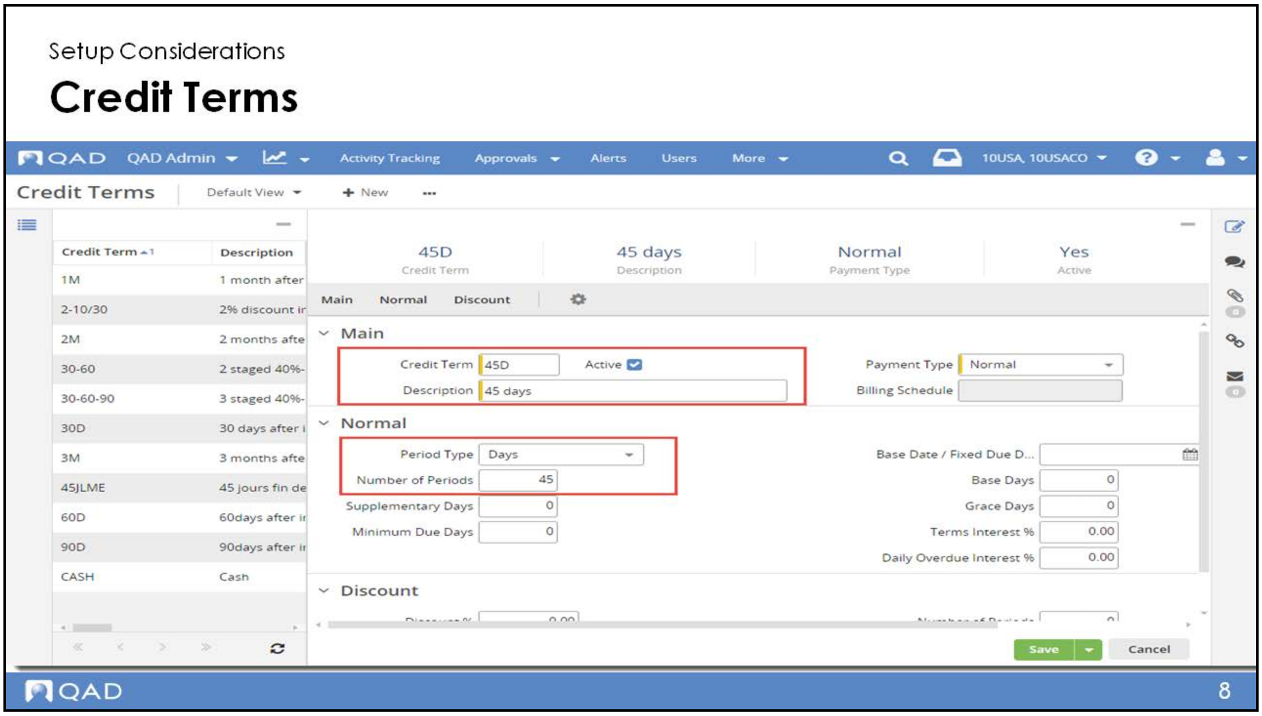
Use Shared Sets to create shared set codes. Enter a shared set code and description. Select a shared set type for the shared set code.

The following types of data can be shared:

- Customers
- Suppliers
- Accounts
- Sub-accounts
- Sub-account COA mask
- Cost centers
- Cost center COA masks
- Projects
- Project COA masks
- Exchange rates
- Daybooks

Example: Three US domains can use the same chart of accounts, while two other domains in China use another accounts shared set. Using shared sets streamlines and standardizes the use of accounts across the enterprise.

Credit Terms



System Data Setup in .NET UI

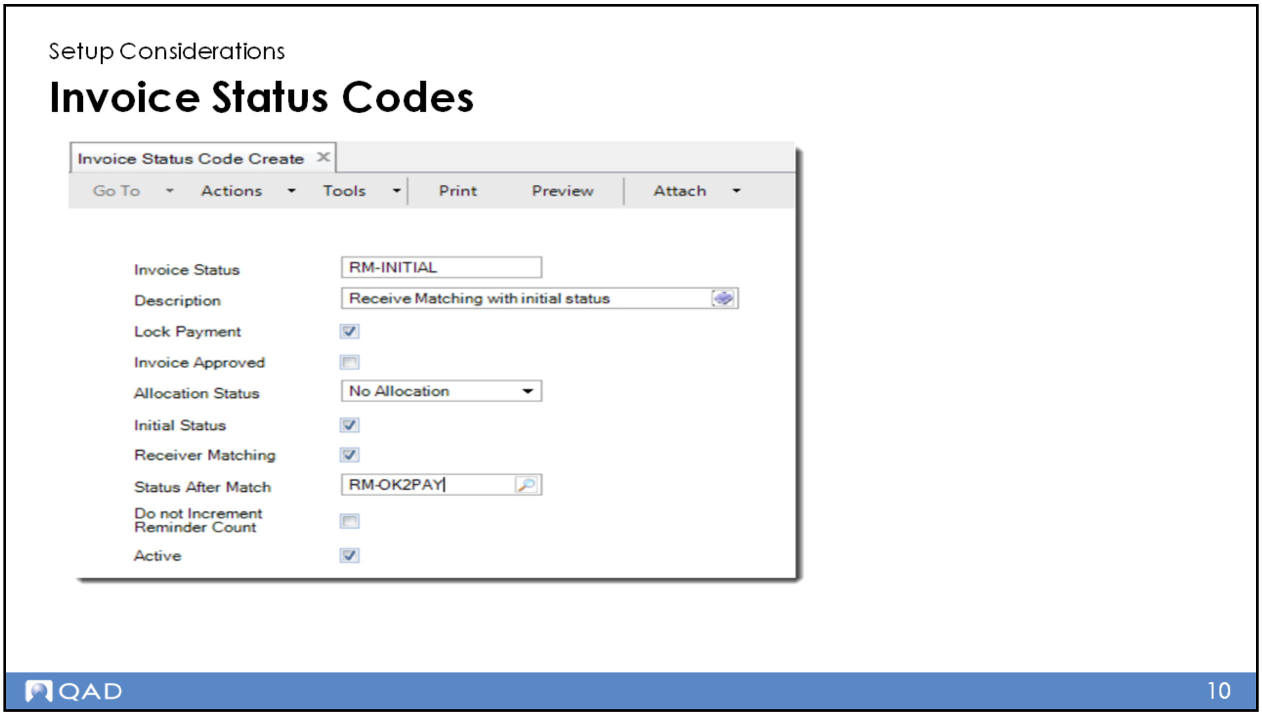
Setup Considerations

System Data Setup in .NET UI

- Tax Zones
- Tax Environments
- Tax Classes
- Tax Usages
- Tax Types
- Invoice Status Codes
- Profiles

QAD 9

Invoice Status Codes



Use Invoice Status Code Create to create codes used to:

- Manage the approval, allocation status, and payment of invoices for suppliers.

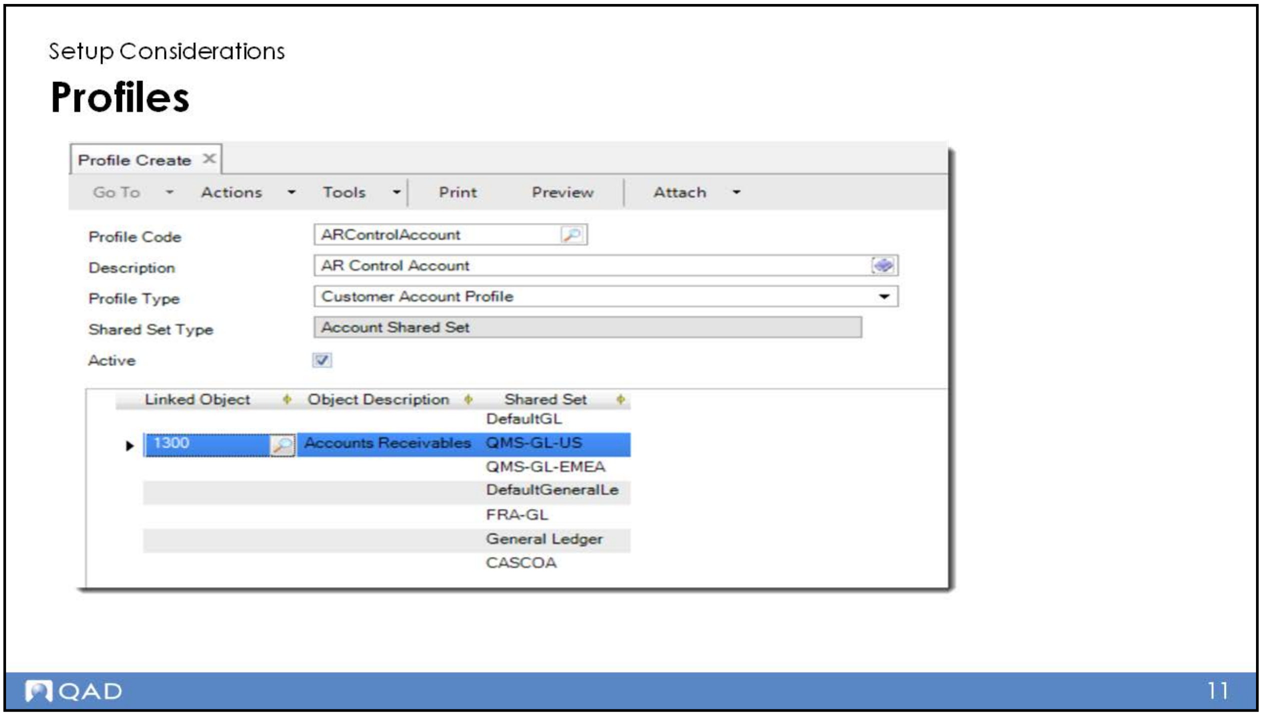
- Identify contested invoices for filtering reports and managing finance charge calculation for customers.

- Associate a default invoice status with each customer and supplier record.

Invoice status codes are primarily used with suppliers. You approve supplier invoices and release them for payment by modifying the invoice status code applied to the invoice. You also control when and how postings occur by specifying an invoice status code with a different allocation status.

The allocation status is typically changed after receiver matching, and you can specify the status the system should use after matching by linking two codes together. This linking is used to provide defaults during the processing of supplier invoices when receiver matching is done as a separate step. The defaults can be changed as needed.

Profiles

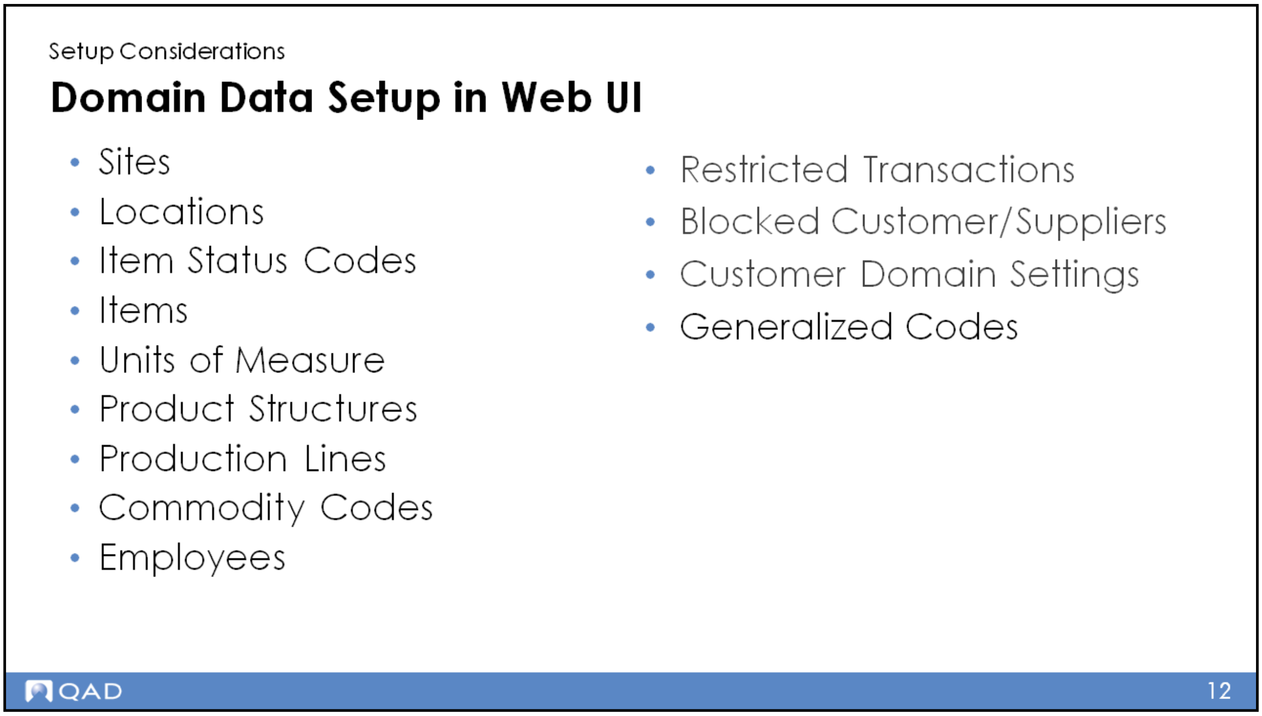


Use Profile Create to create profiles. You use profiles to identify the relationships between records in shared sets of different types. You may need only one profile of each type. However, there are cases when you may want more than one. For example, it is a common practice to have different AR and AP accounts for domestic and international trade. This requires defining a different profile code for each type.

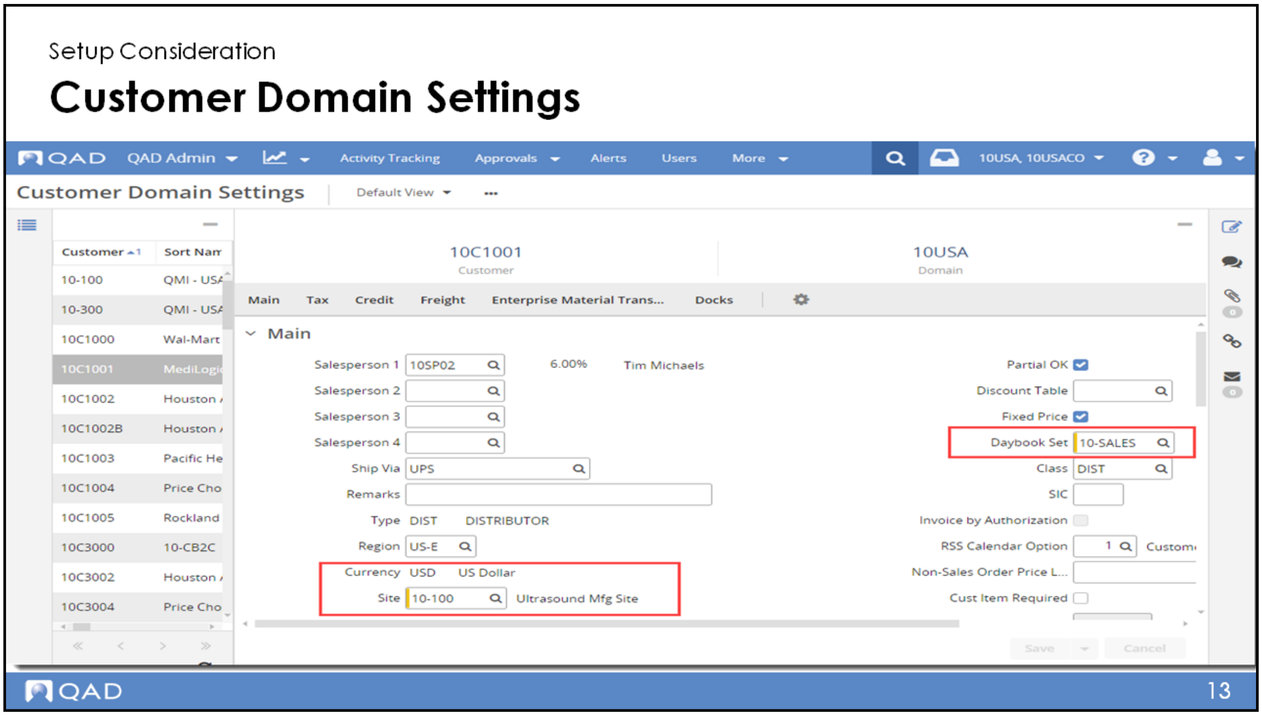
You can create profiles of the following types:

- Banking Entry Daybook
- Cash Paid Daybook
- Cash Received Daybook
- Cost Center
- Customer Account
- Project
- Purchase Account
- Sales Account
- Sub-Account
- Supplier Account

Domain Data Setup in Web UI

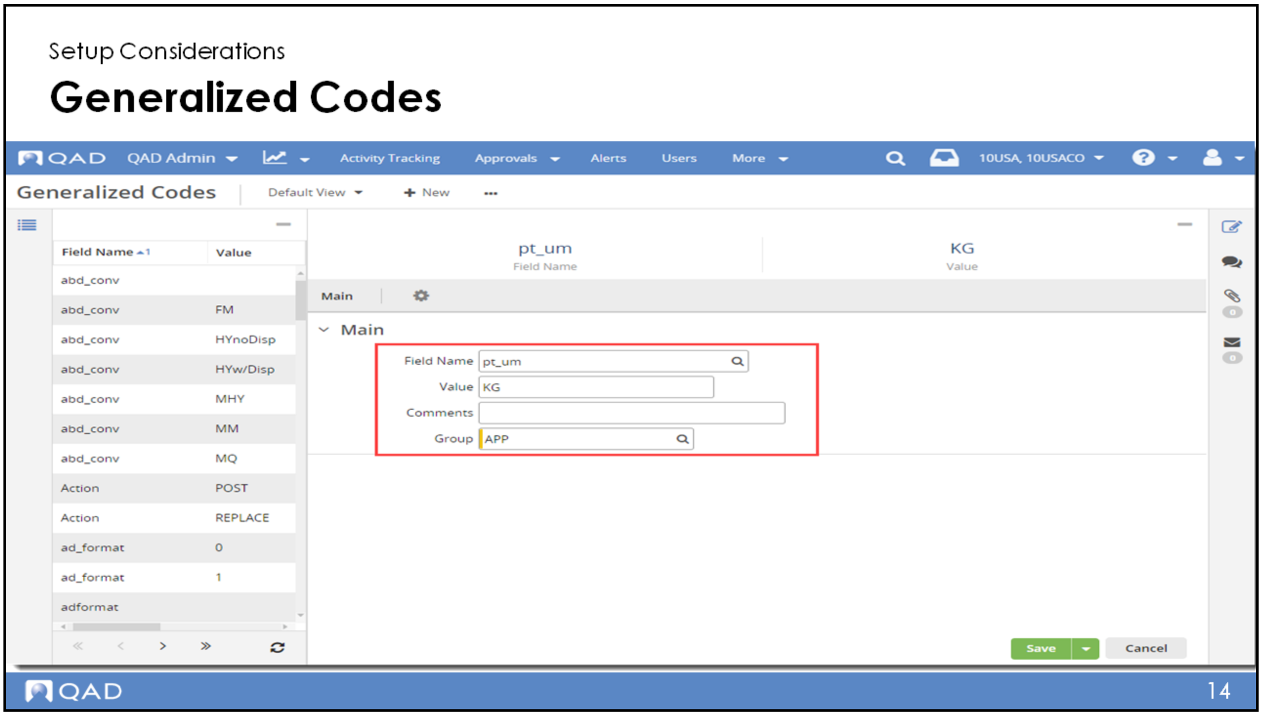


Customer Domain Settings



Use Customer Domain Settings to complete operational data for each company that purchases your products. Customer records and associated financial data are created in the base module and reference a business relation for address details and tax defaults.

Generalized Codes



Use Generalized Codes to define values for the fields that only accept predefined codes.

Enter field name, value, and optionally a comment. If you have permission, specify the generalized code group that this generalized code belongs to.

Domain Data Setup in .NET UI

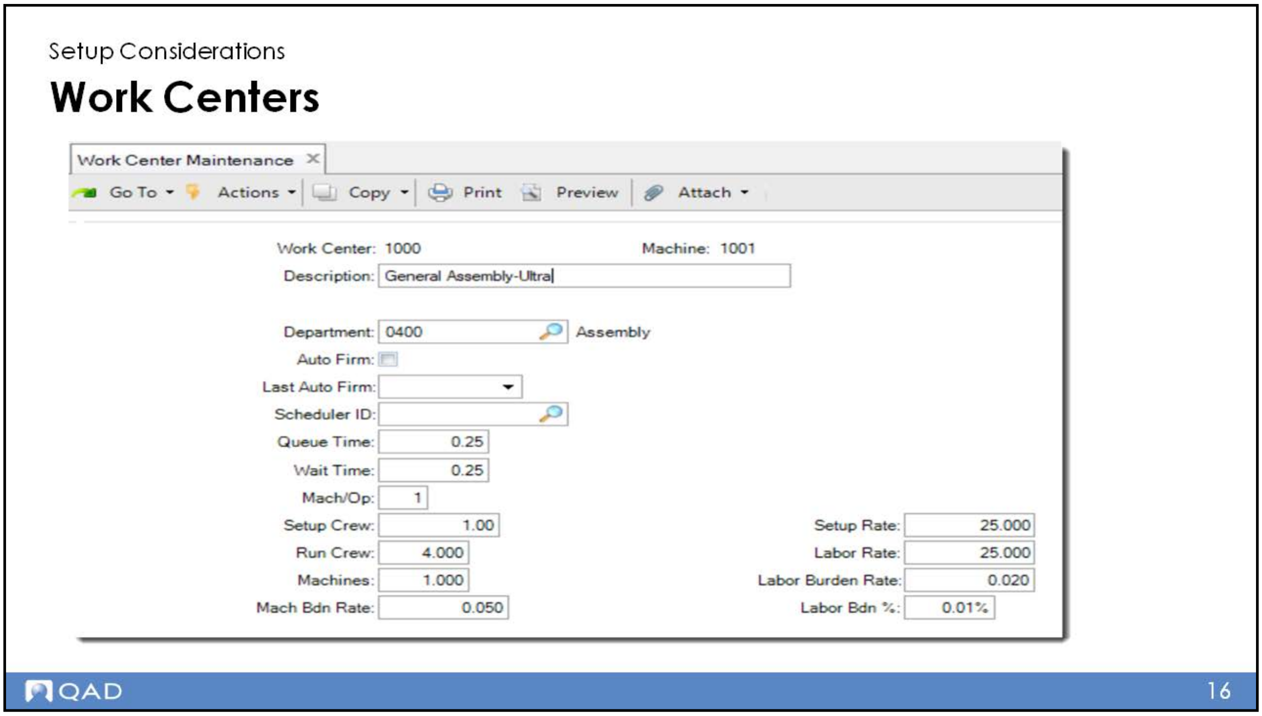
Setup Considerations

Domain Data Setup in .NET UI

- Domains
- Entities
- Inventory Status Codes
- Shop Floor Calendar
- Departments
- Work Centers
- Routings

QAD 15

Work Centers



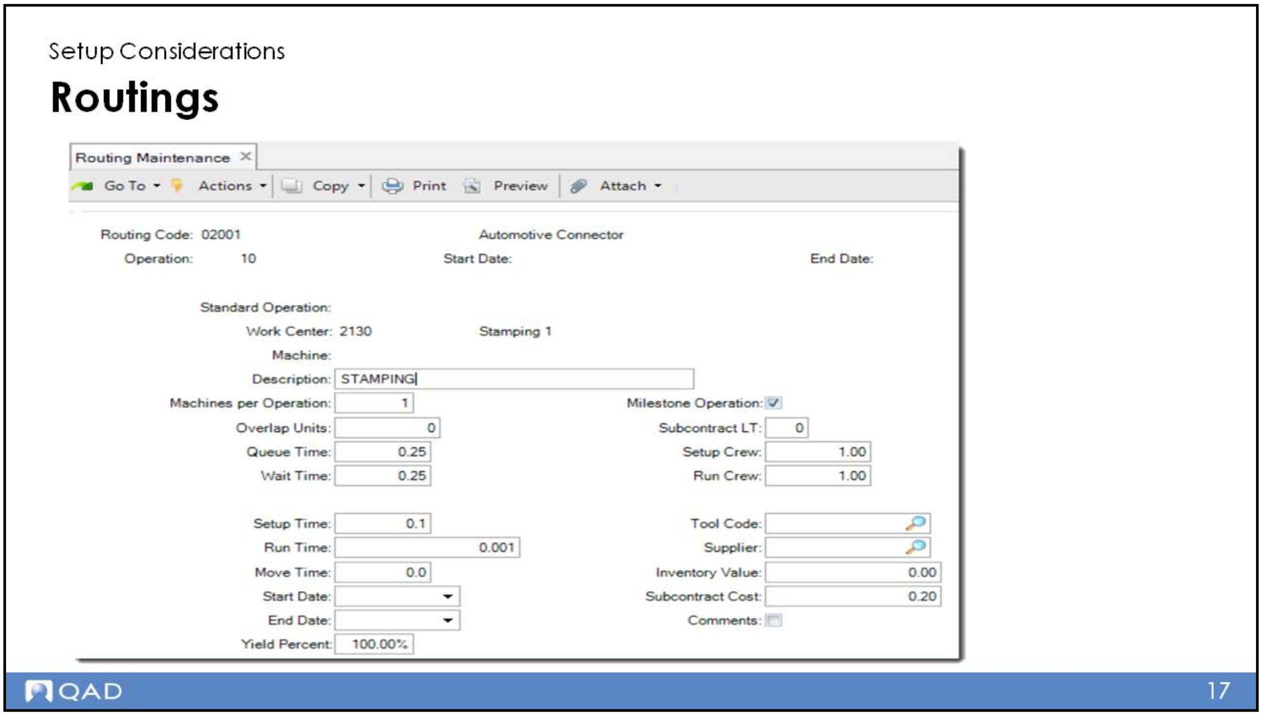
Use Work Center Maintenance to define work centers, which are production areas with one or more people or machines having identical capabilities.

A work center and machine code identify a work center. Machine can be blank. Specify a machine only if there is more than one machine in the work center and they cannot be used interchangeably (that is, each machine is different or dedicated to different items).

If you specify a machine code, each operation must be assigned to a particular machine. Capacity and load can be reviewed by machine or aggregated by work center.

When a subcontractor is used, set up a work center for each type of subcontract operation or supplier, leaving costs zero.

Routings



Use Routing Maintenance to specify the sequence of operations used to produce a finished product or subassembly.

Each routing consists of one or more operations. Operation information consists almost entirely of control data, specifying where and how work is done, how long it should take, and how much it should cost.

The routing code is typically the item number of the manufactured item, but can be different for alternate routings or for similar routings or processes at different sites. When different, specify the default routing code in Item Planning Maintenance or Item-Site Planning Maintenance.

Each operation specifies a work center and machine, determining where the operation occurs. For in-house operations, specify run time, setup time, and move time. If subcontracted, specify the preferred supplier and subcontract cost.

Financial Data Setup in Web UI

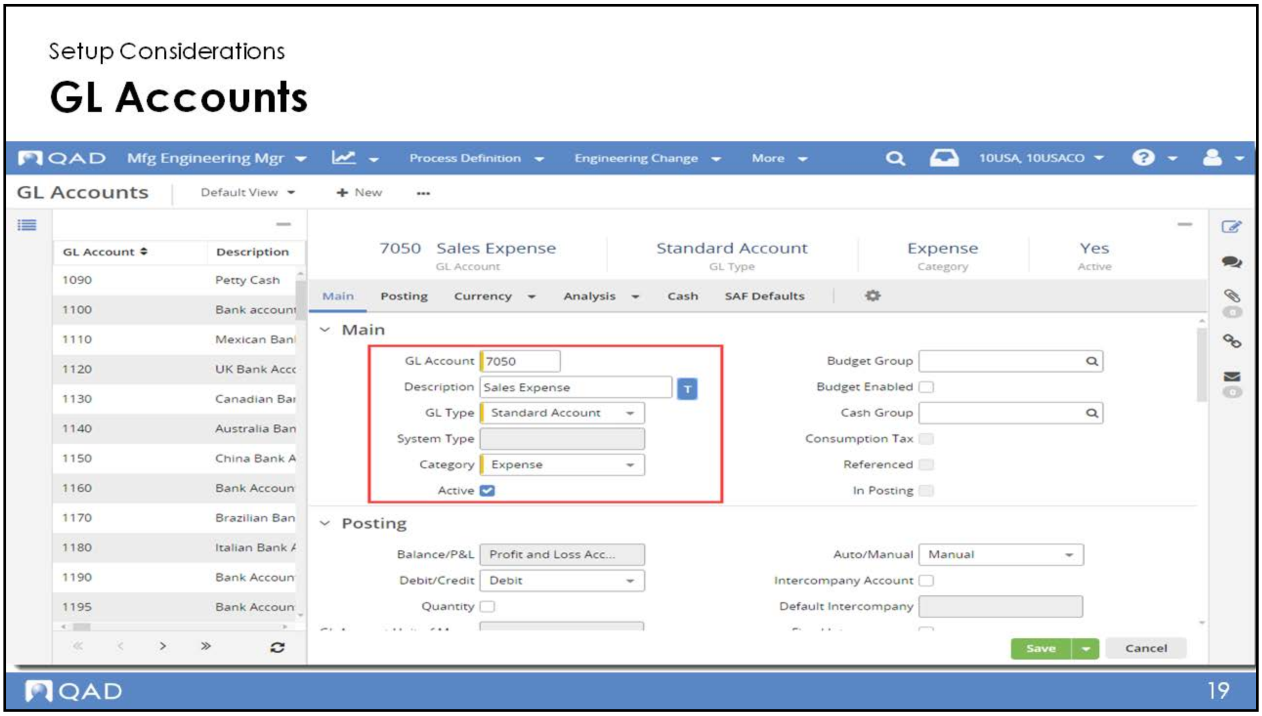
Setup Considerations

Financial Data Setup in Web UI

- Customer Types
- Customers
- Customer Ship-tos
- Docks
- End Users
- Supplier Types
- Suppliers
- Remittance/ Reminder Addresses
- Item Supplier Certifications
- Daybook Sets
- Default Daybooks
- GL Accounts
- Sub-accounts
- Cost Centers
- Projects

QAD 18

GL Accounts



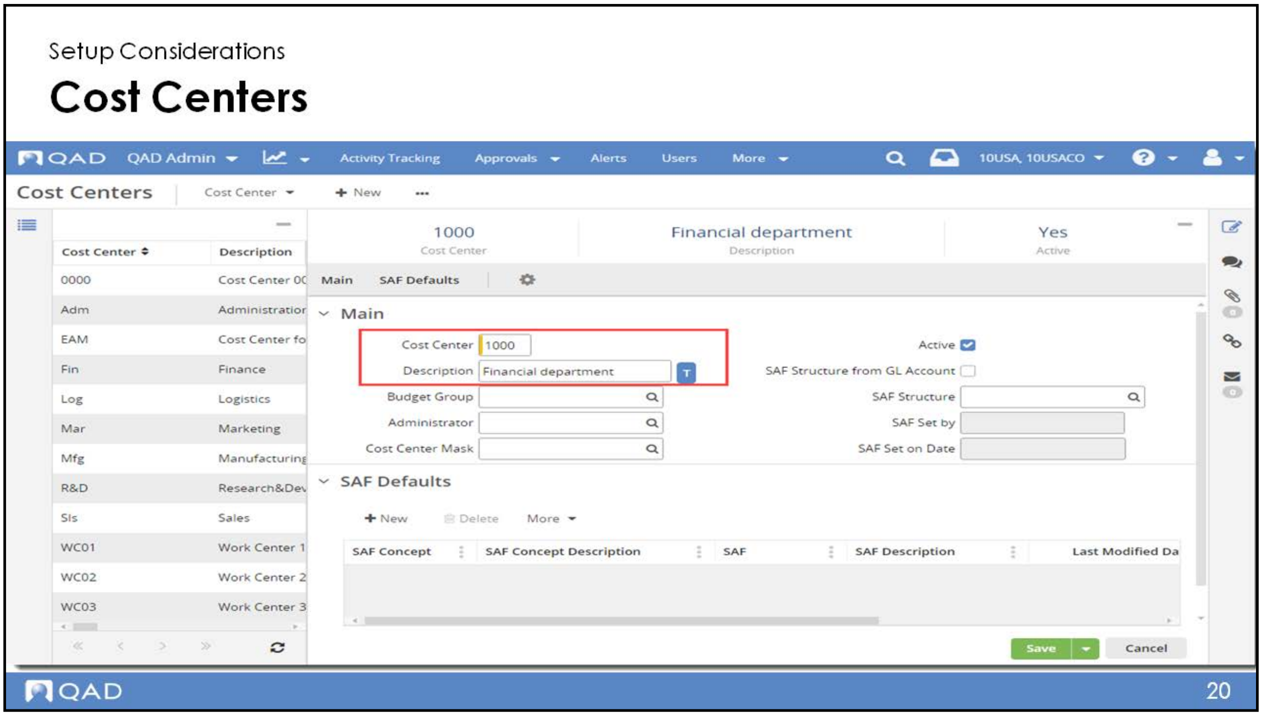
Use GL Accounts to create GL accounts.

You can create the following types of accounts: Bank, Cash, Closing, Cross-Company Control, Customer Control, Customer Payment, Fixed Assets, Inventory Control, Open Items, Standard, Supplier Control, Supplier Payment, System, Tax, and WIP Control.

System accounts are used for system-wide functions, such as rounding differences or exchange rate gains and losses. The System Type drop-down list in the GL Account screen is enabled when you specify a system account.

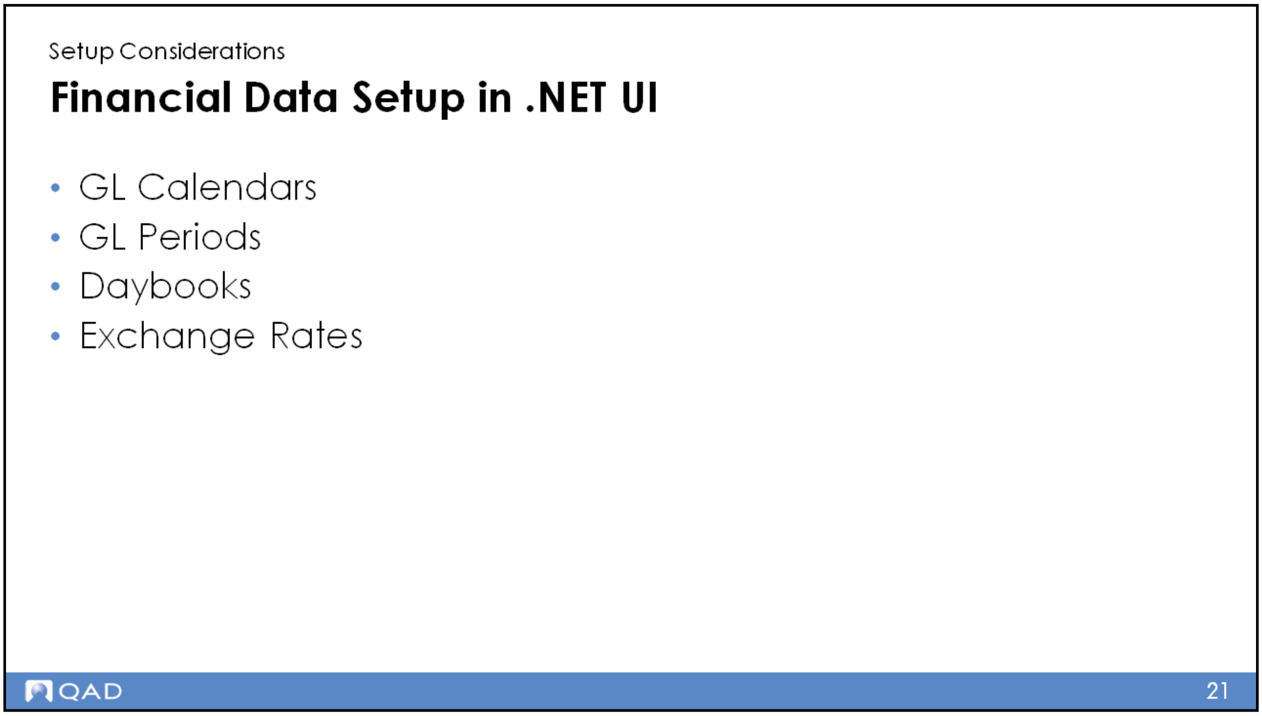
GL Accounts includes seven panels: Main, Posting, Currency, Analysis, Banking, Cash, and SAF Defaults.

Cost Centers

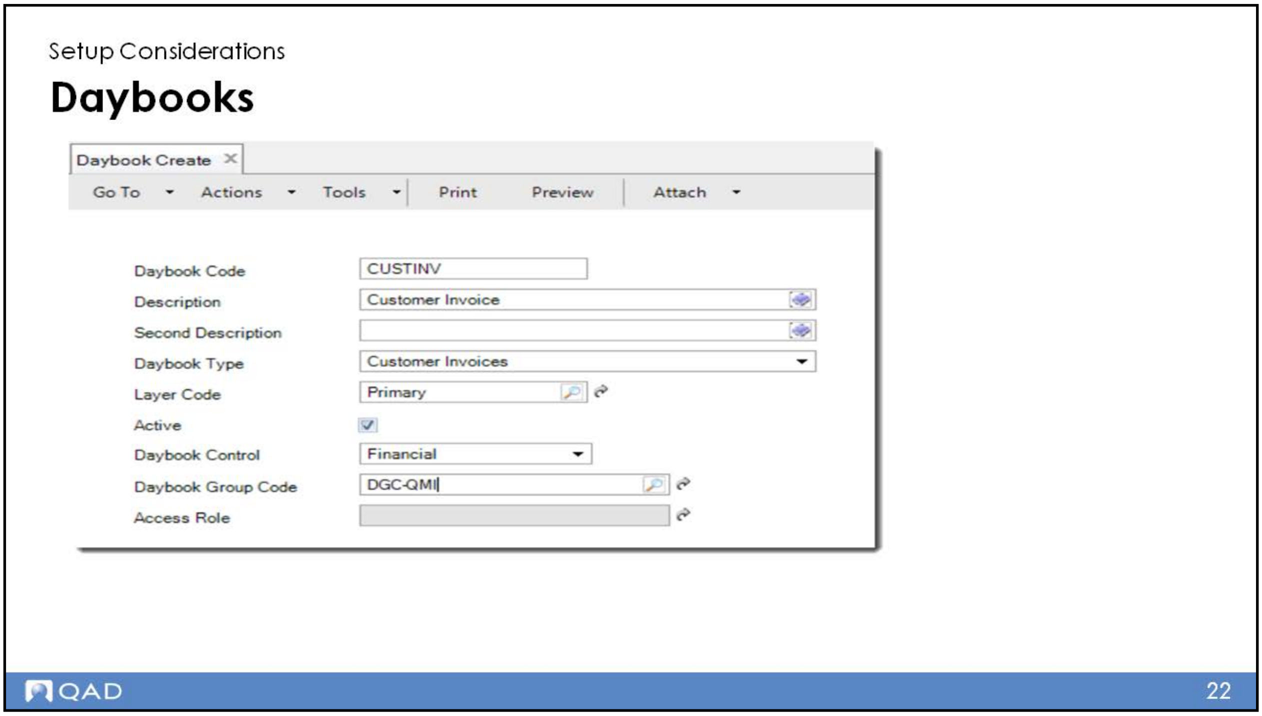


Use the Cost Centers to create cost centers that provide an additional reporting level for the GL account and sub-account. Typically, a cost center can be a department or profit center within the entity for which you want to generate separate reports.

Financial Data Setup in .NET UI



Daybooks



Use Daybook Create (25.8.1.1) to create daybooks.

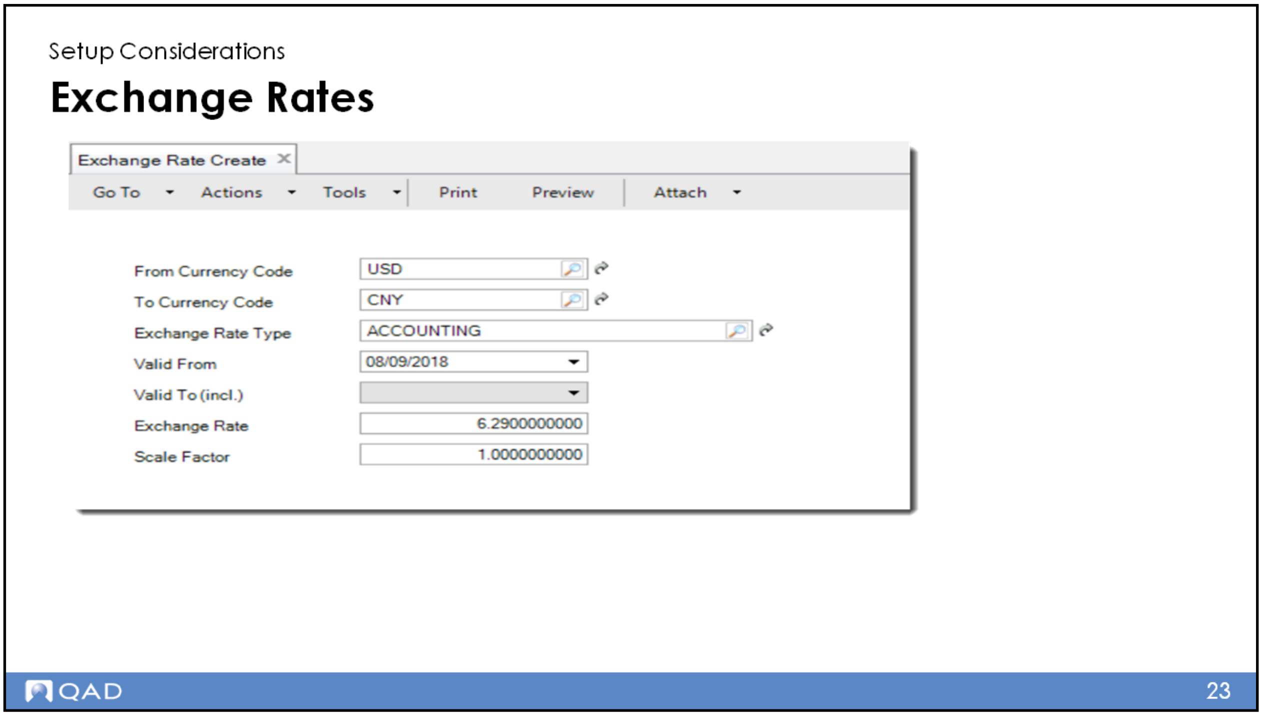
You can create the following types of daybooks: Banking Entries, Cash Entry, Consolidation, Customer, Journal Entries, Matching Daybook, Revaluation, Periodic Costing, Reversing Entries, Supplier, and Year-End Closing.

Daybooks contain the transaction posting lines, and control the posting of transactions because each daybook must be linked to an accounting layer. In addition, each daybook is associated with a daybook control type, which separate postings based on their source.

Daybooks define the accounting layers to use for posting: official, management, or transient. For example, IFRS adjustment postings can be applied to the management layer to make the books conform to an IFRS standard. Therefore, transactions that require verification can be easily grouped and isolated.

Depending upon the daybook type, the layer codes available for selection can be limited. Each posting belongs to a single daybook and each daybook is linked to a single layer type.

Exchange Rates



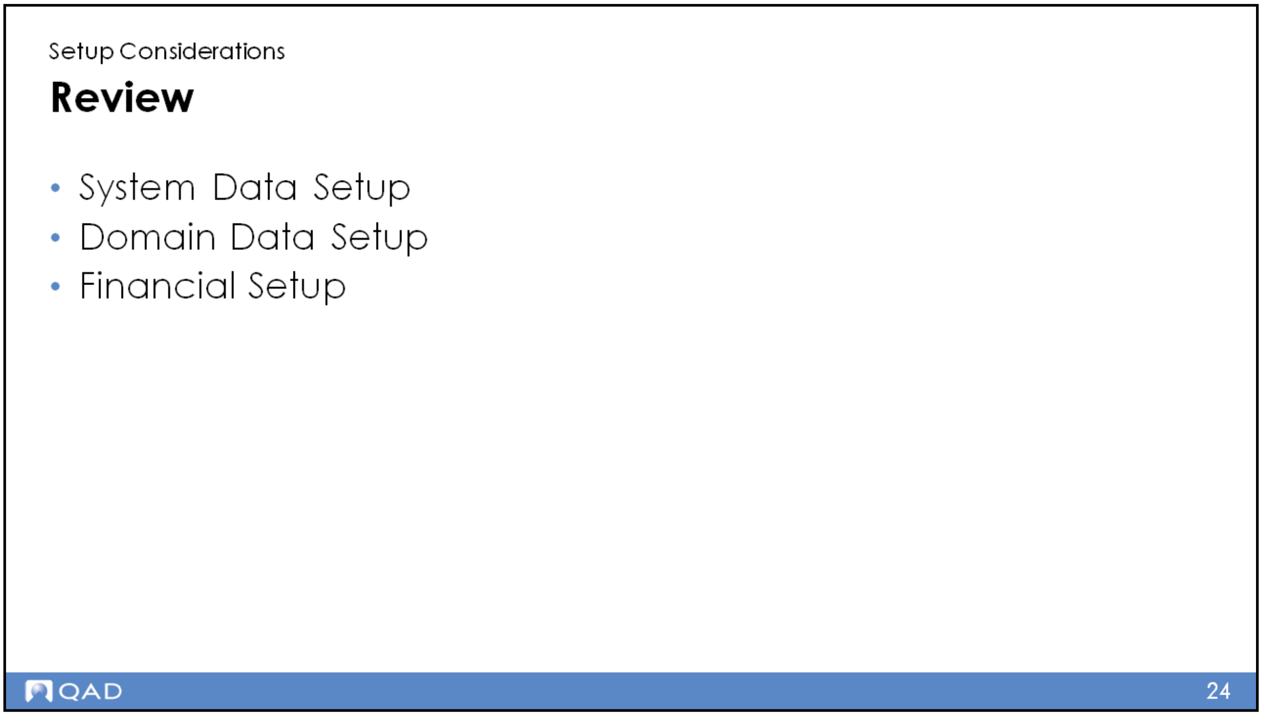
Use Exchange Rate Create (26.4.1) to create exchange rates, which are applied to multiple-currency transactions. Exchange rates are stored at the shared set level. Therefore, any changes made to exchange rates in a domain affect all other domains using the same shared set.

Exchange rates are specified as the amount by which you multiply a single unit of a From Currency to reach the equivalent number of the To Currency units. Exchange rates can be expressed in up to 10 decimal places.

You can create an exchange rate in only a single direction; you cannot create both an exchange rate and a reciprocal rate.

Exchange rates can have both a start date and an end date. An exchange rate between two currencies is superseded by an exchange rate of the same type between the same two currencies with a later start date. Exchange rates can also have a scaling factor. Use scaling factors for currencies that have a very small value relative to other currencies. The actual exchange rate used is the product of the entered exchange rate and the scaling factor. The scaling factor can have up to seven decimal places.

Review


Setup Considerations
Review
System Data Setup
Domain Data Setup
Financial Setup
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24

Exercise: Setup Considerations

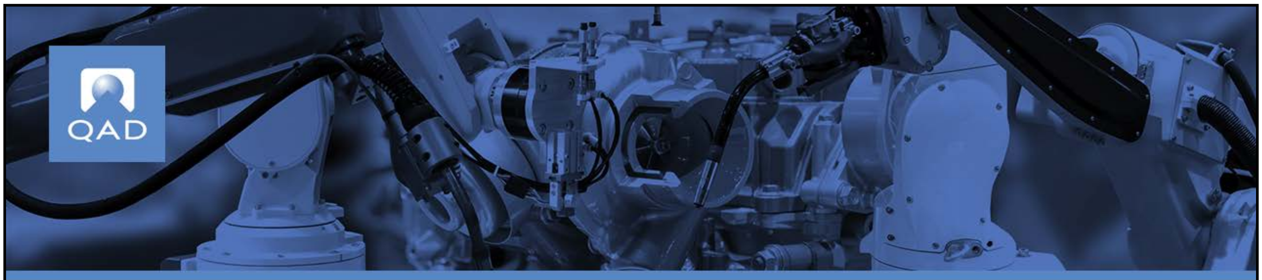
Setup Considerations

Exercise: Setup Considerations

QAD 25

CHAPTER 5

Security



Security

CI Quick Start

Overview

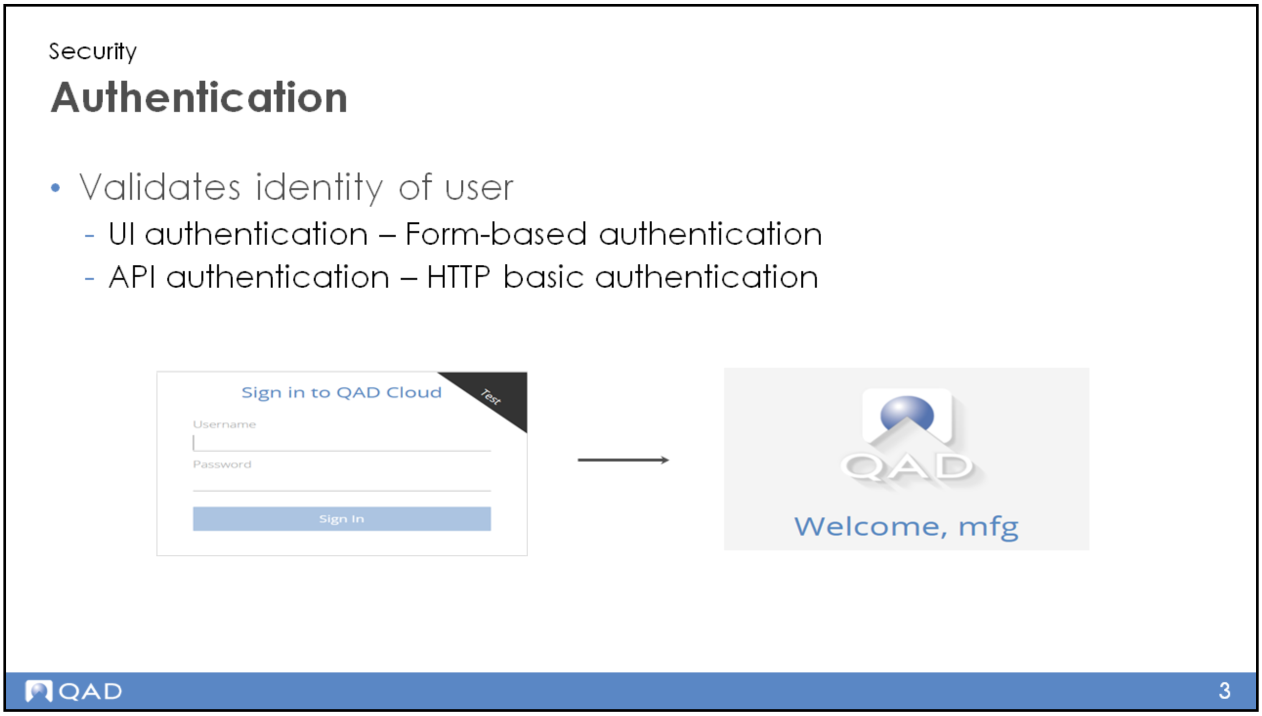
Security

Overview

- Role-Based Access Control
- Users, Roles, Role Membership
- Role Permissions
- Resource
- Set Up User, Role, Role Membership
- Role Permissions
- User Access
- Menus

QAD 2

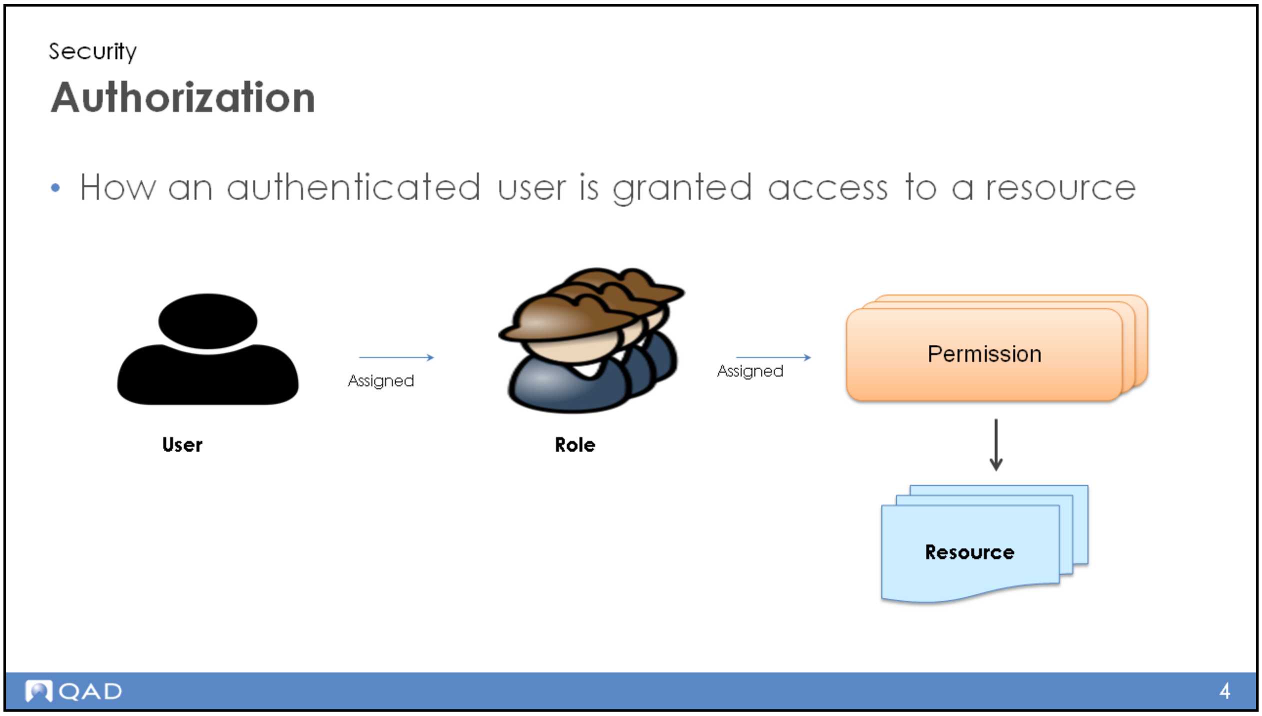
Authentication



Authentication is the mechanism through which the application identifies the user. The authentication service provides the means to allow users to sign in to the application and be verified as a trusted user.

There are two types of authentication: form-based UI authentication and HTTP basic authentication.

Authorization

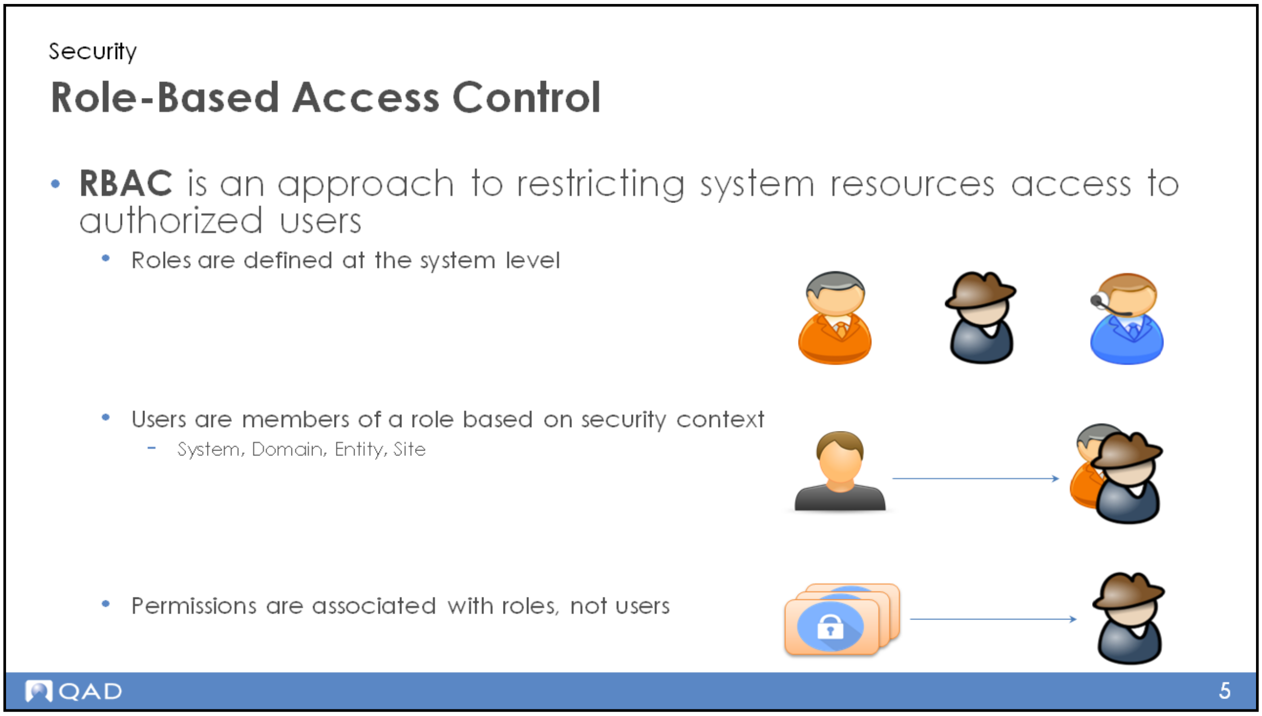


Authorization uses a combination of “role permissions” information and “role membership” information.

Role permissions is used to identify the resources that should be accessible by users belonging to a role.

Role membership is used to identify the roles a user belongs to in the system.

Role-Based Access Control



Role-based access control (RBAC) is an approach to restricting system access to authorized users.

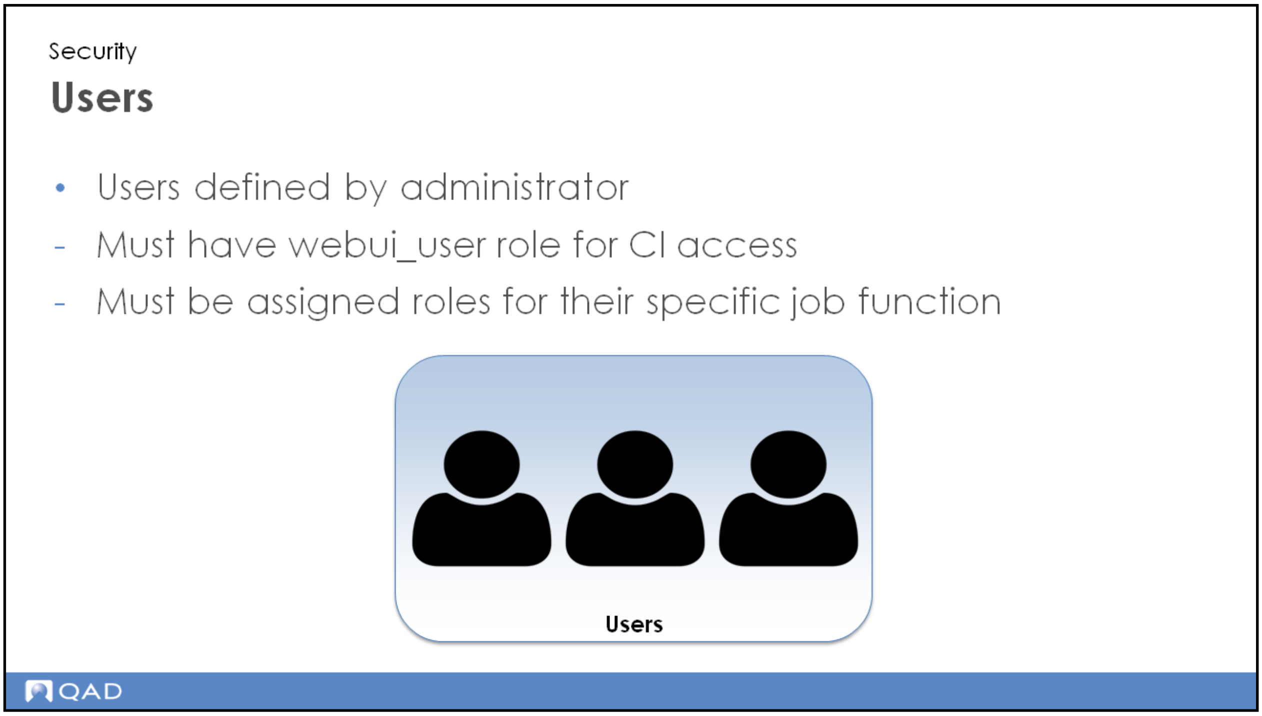
Within an organization, roles are created for various job functions.

The permissions to perform certain operations are assigned to specific roles.

Users are assigned particular roles within a security context.

Management of individual user rights becomes a matter of simply assigning appropriate roles to the user.

Users

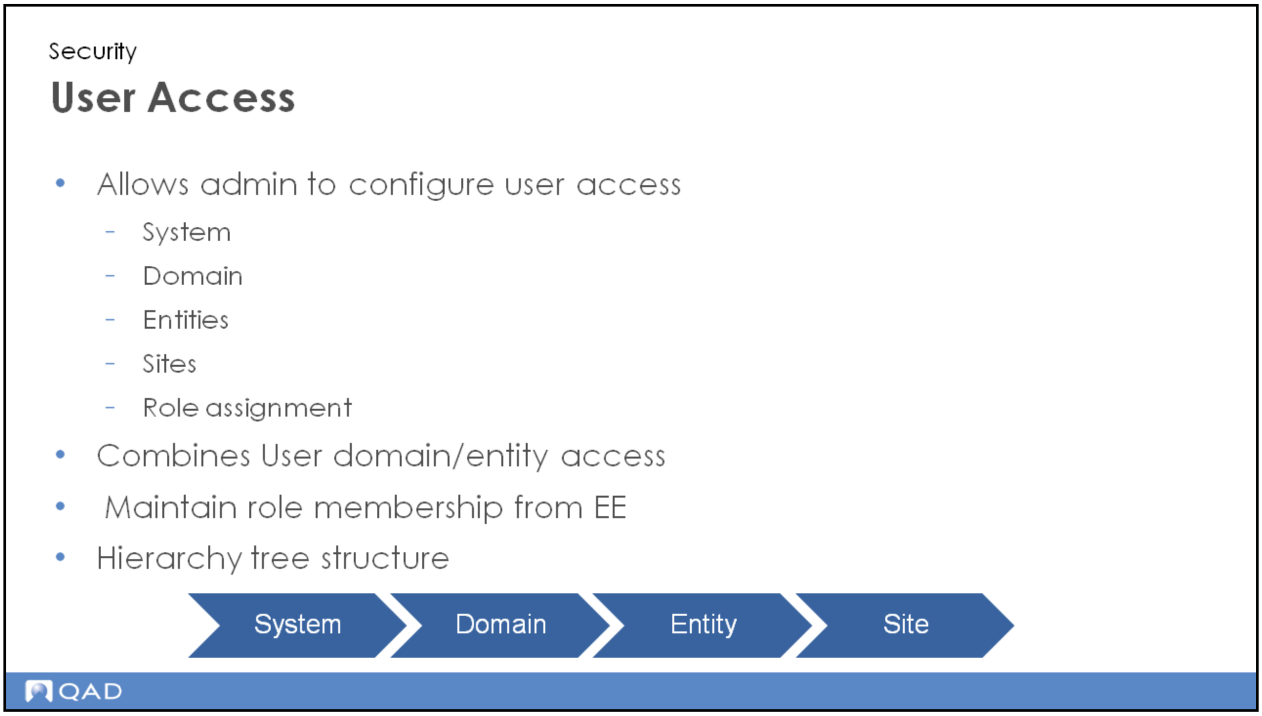


Users are defined by the administrator.

In order for a user to be able to access a resource, the user needs permission. Determining if a user should be granted permission is a two-step process: 1) determine if this user is a member of any of the roles in the current security context and 2) determine what roles have access to the resource.

If a user needs to access the Web User Interface, the user must have a webui_user role.

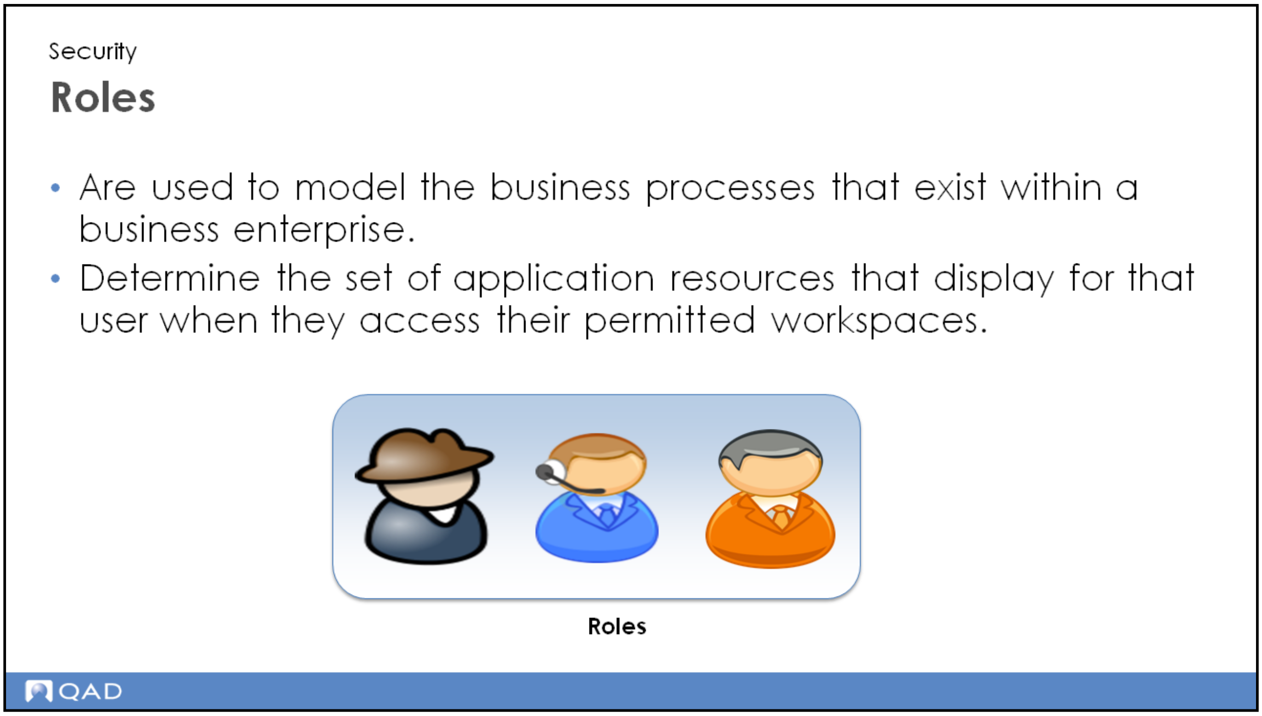
User Access



After auser’s access has been granted to those entities, use User Access to assign sites and roles to user.

The hierarchy tree structure includes system, domain, entity, site. Then determine the access and role membership.

Roles



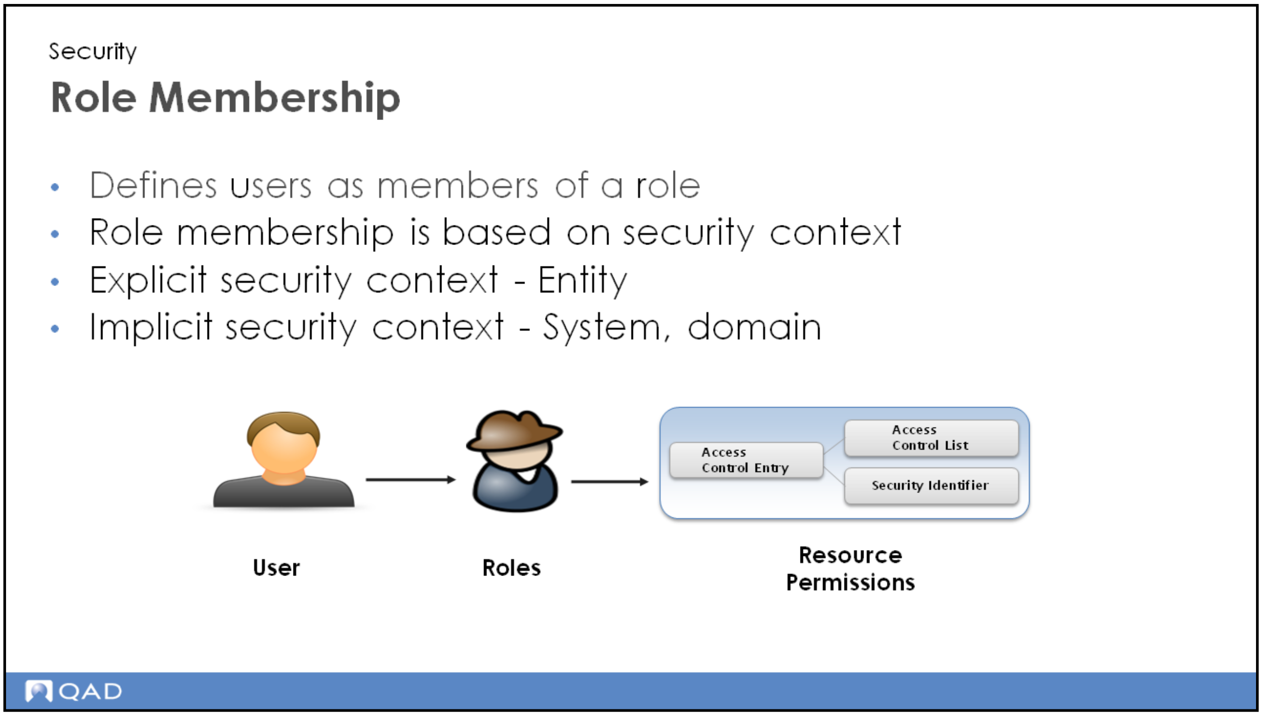
Roles are used to model the business processes that exist within a business enterprise. Roles determine the set of application resources that display for that user when they access their permitted workspaces. In order to model your organization's business processes effectively, users need access to all the appropriate application resources required for them to perform their everyday business tasks.

Roles are defined at the system level. Roles and role menus delivered by QAD are samples only.

QAD reserves the right to change sample role menus or permissions.

Customers should create their own roles and may copy existing role menus.

Role Membership

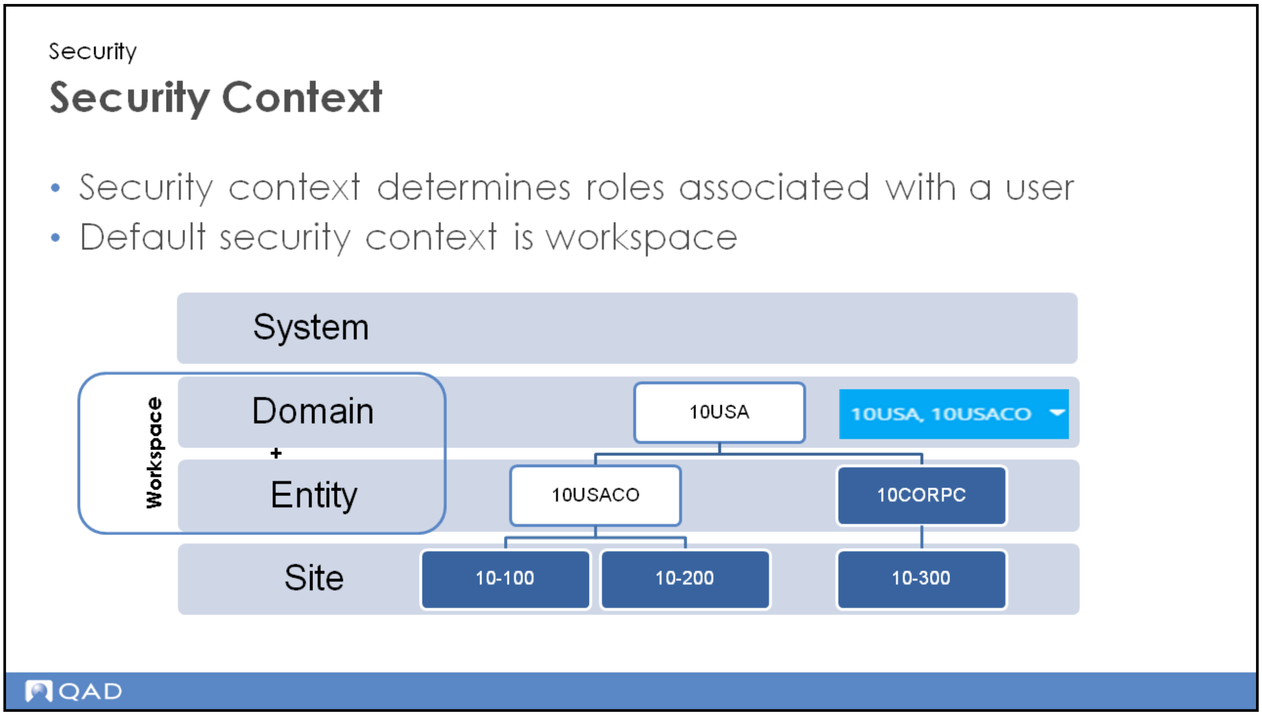


Role Membership is the set of links between roles and users.

A user is defined as a member of a role, and role membership is based on security context. For a user, the entity is the explicit security context; the system and domain are the implicit security context.

A user can also have a default role for each of the security contexts. This is for the case where a user may have more than one role within a security context.

Security Context



Security context determines roles associated with a user. The default security context is workspace based. Domain and Entity provided the security context for a user.

User and role are used when determining access rights to a resource. The roles associated with a user are determined by the current workspace, which is comprised of the domain and entity.

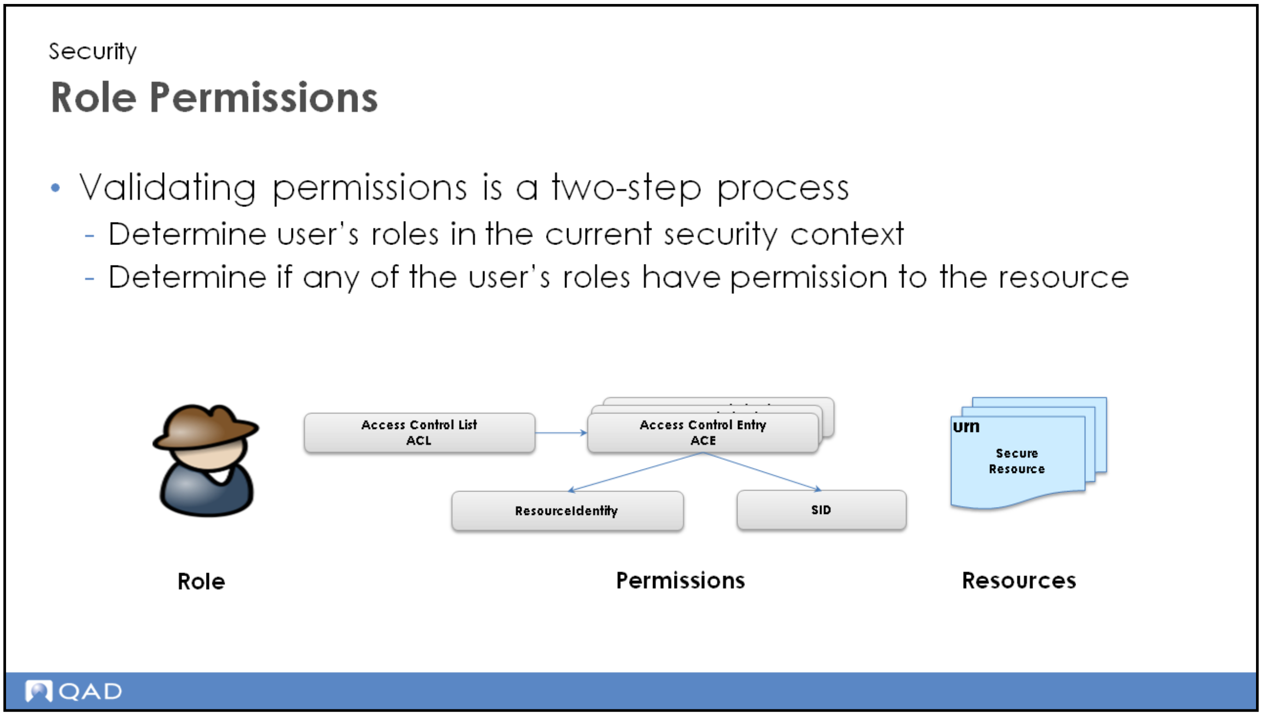
The System is the resource available across all domains and entities.

The Domain is a resource only available in this domain.

The Entity is a resource only available in this entity.

The Site is a resource only available in this site.

Role Permissions

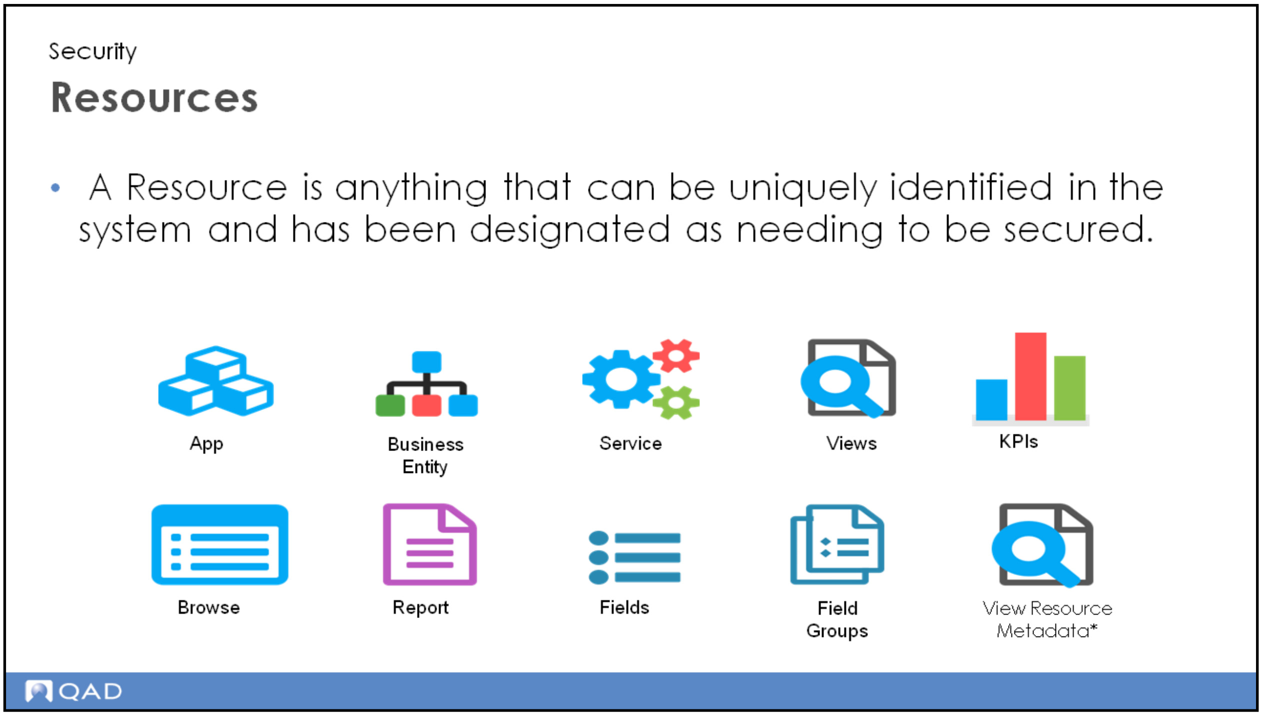


Role permissions are defined by assigning a set of application resources to a role.

Role permissions are system-wide settings and are granted or denied on resources.

Permission is inherited from the parent, and the user must be granted permission for access.

Resources



An app is a collection of programs that exposes a cohesive set of business services through a well-defined interface. The set of exposed services defines a high-level area of business functionality. Example: Sales Orders.

A business entity is an application business object with a specific CRUD interface. Example: SalesOrder.

A browse is a view of data that may be sourced from multiple tables across multiple modules

A report is a view of data generated from multiple datasources based on given filter criteria. Example: Sales Order Price Report.

A Service exposes a piece of functionality outside of the regular CRUD interface. Example: AuthorizationService, AttachmentService

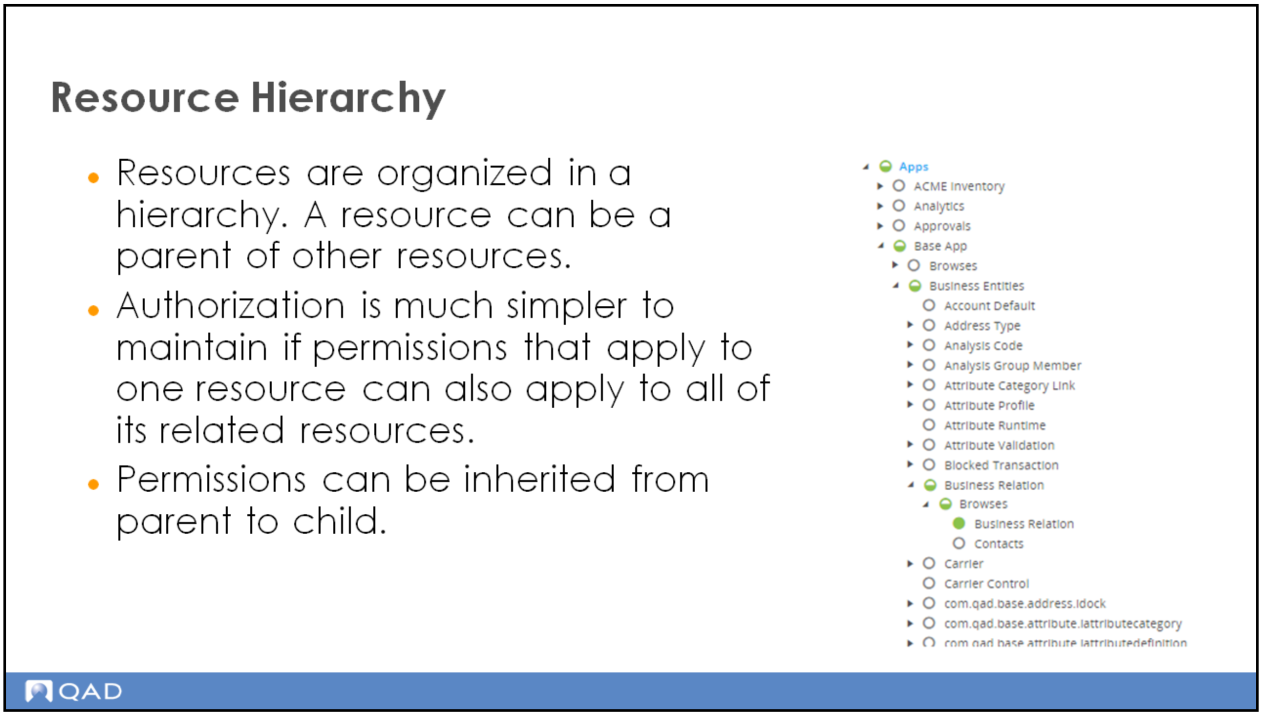
Action Centers are based on Dashboards and KPIs. Dashboards are associated with Users and not Roles as with other secure resources.

Field is a single element of data in a business entity. Example: CreditTerms.

Field Group is a logical grouping of fields that are part of a business entity.

View Resource Metadata is not a secured resource but used to create secured resource.

Resource Hierarchy



Resources are organized in a hierarchy. A resource can be a parent of other resources.

Authorization is much simpler to maintain if permissions that apply to one resource can also apply to all of its related resources.

Permissions can be inherited from parent to child.

Secure Resources Permissions

Security

Secure Resources Permissions

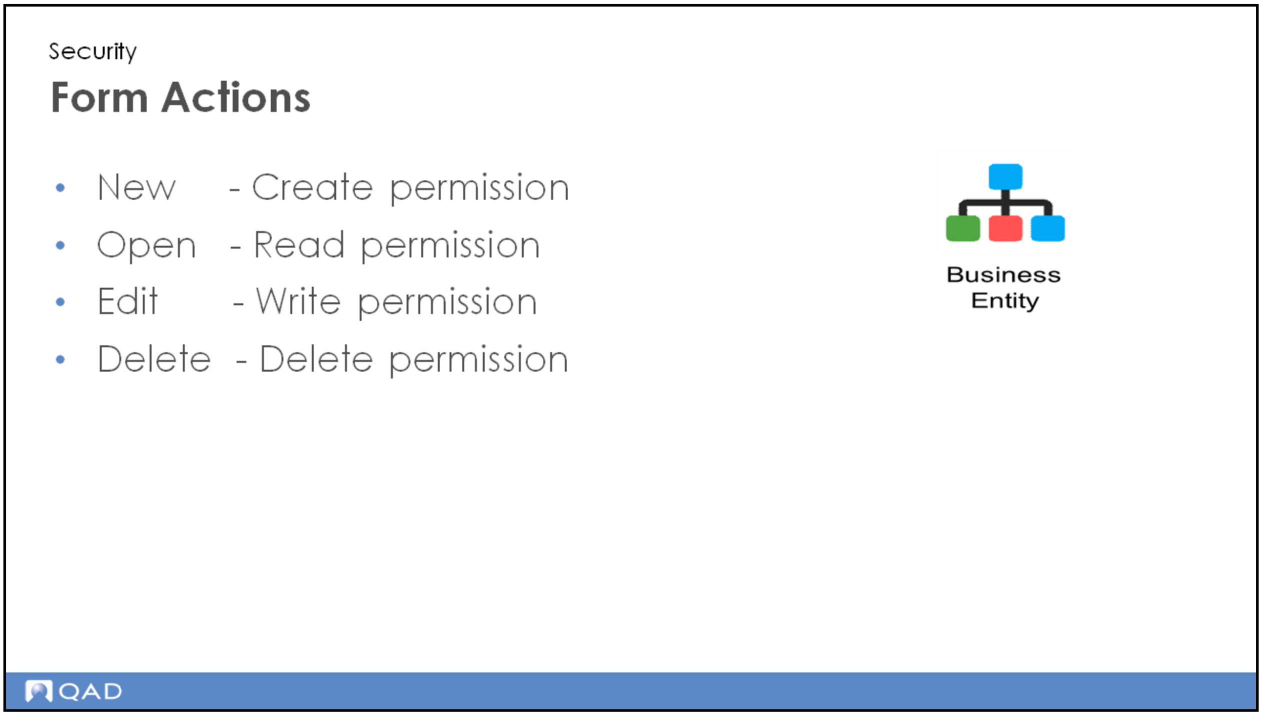
- Security is driven by menu items and components.
- Each role is either granted or denied access to a given menu item/component.

Resource Type	Permissions
Apps	Approve, Create, Delete, Read, Write
Business Entities	Approve, Create, Delete, Read, Write
Browses	Read
Dashboard & KPIs	Read, Write, Delete
Reports	Read
Services	Create, Delete, Read, Write
Fields	Read, Write
Field Groups	Read, Write
Views	Read

QAD

Security is driven by Secure Resources. Resources are arranged in a hierarchy, and may have multiple associated permission types; for example, Create, Read, Write, Delete, and so on. Any resource can have permissions set explicitly; if not set, the resource will inherit permissions from its parent.

Form Actions



Form Actions include New, Open, Edit, and Delete.

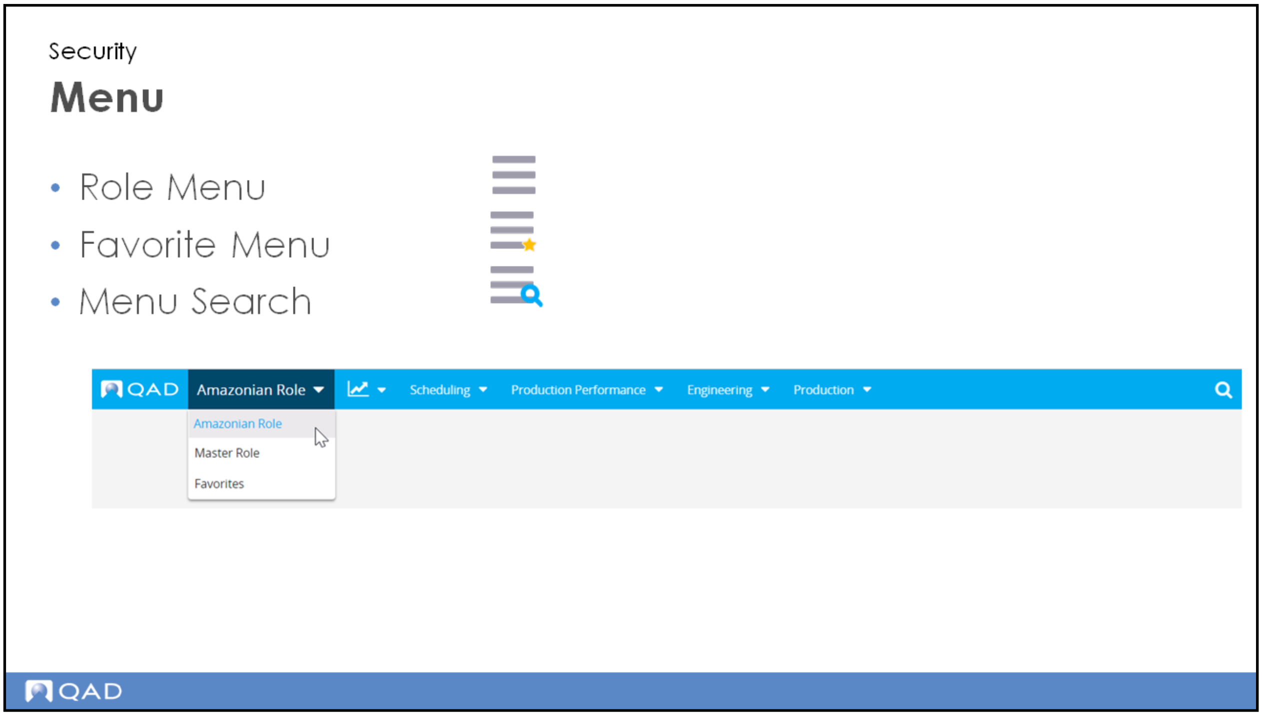
The New action needs the Create permission.

The Open action needs the Read permission.

The Edit action needs the Write permission.

The Delete action needs the Delete permission.

Menu



Menus can be defined by the user as favorites.

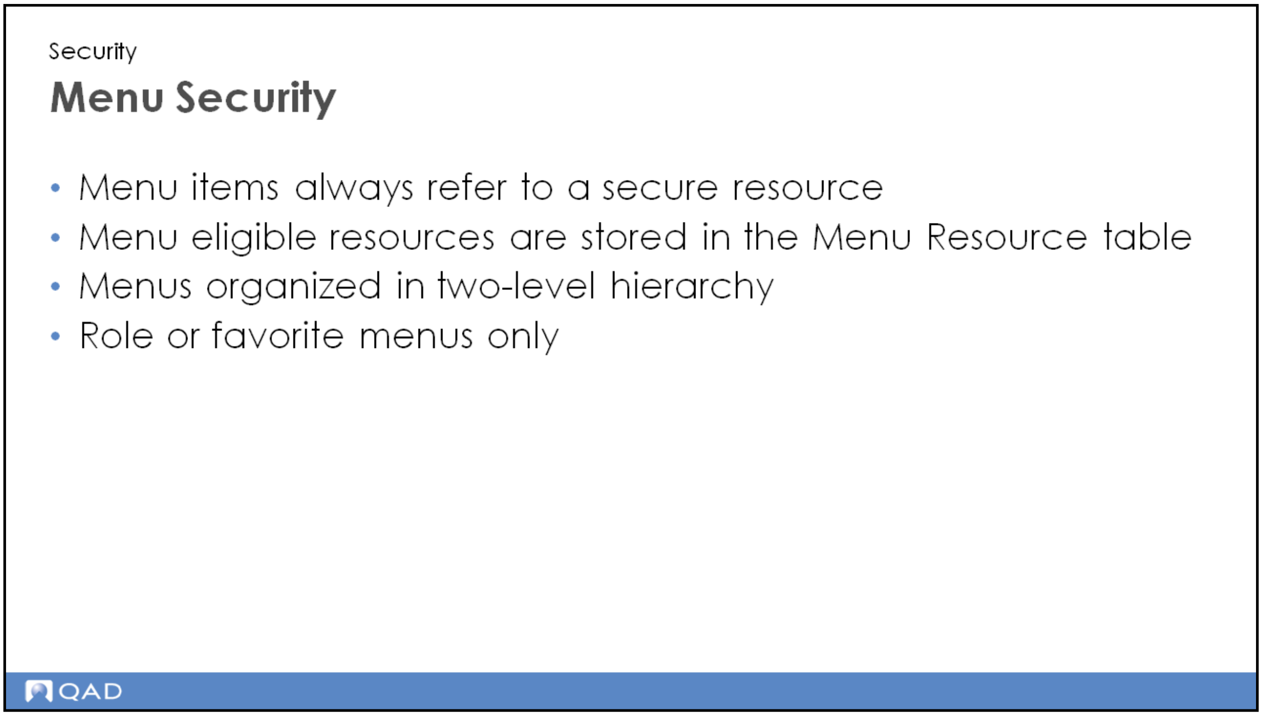
Menus can be defined by an admin as role menus.

Role menus align with the roles associated with the user in the workspace.

Role menu permissions are independent of the role menu.

Permissions SHOULD align with the role menu.

Menu Security



Menu items always refer to a secure resource.

Menu eligible resources are stored in Menu Resource table.

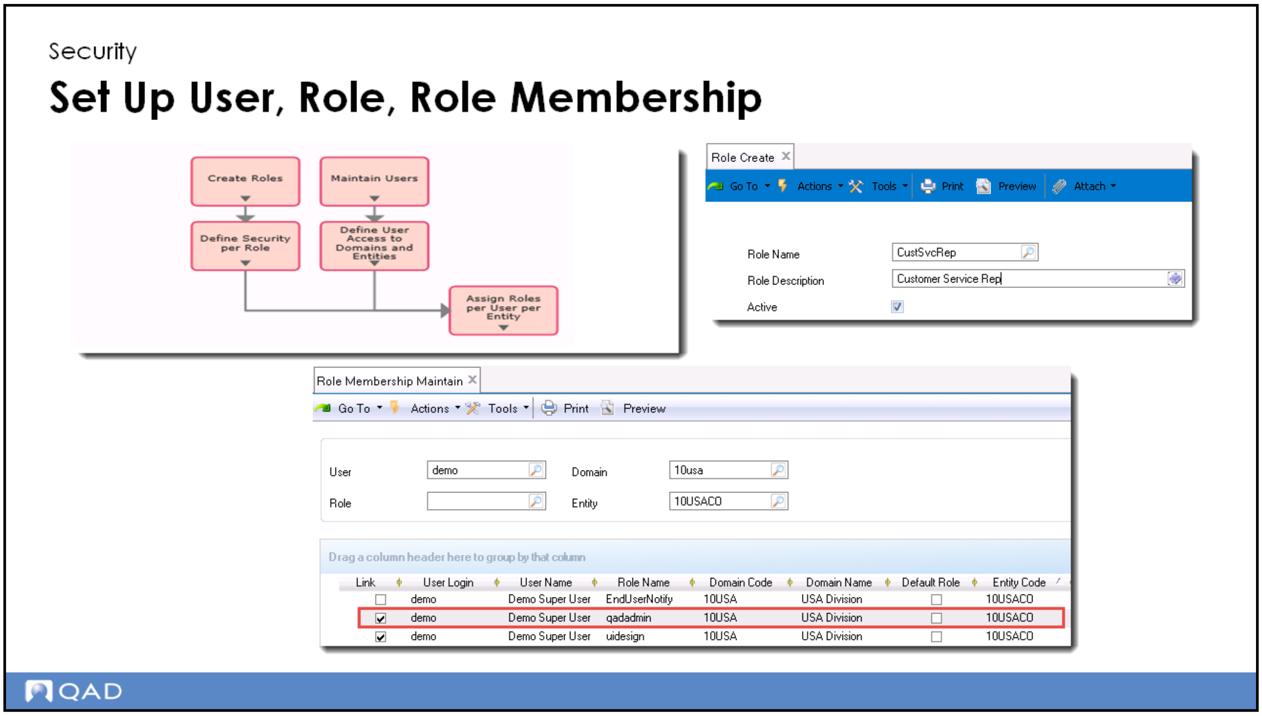
Menus are organized in a two-level hierarchy.

Two menu types: Role or favorite.

QAD role menus can be copied but not modified by customers.

QAD role menu permissions CAN be modified.

Set Up User, Role, Role Membership

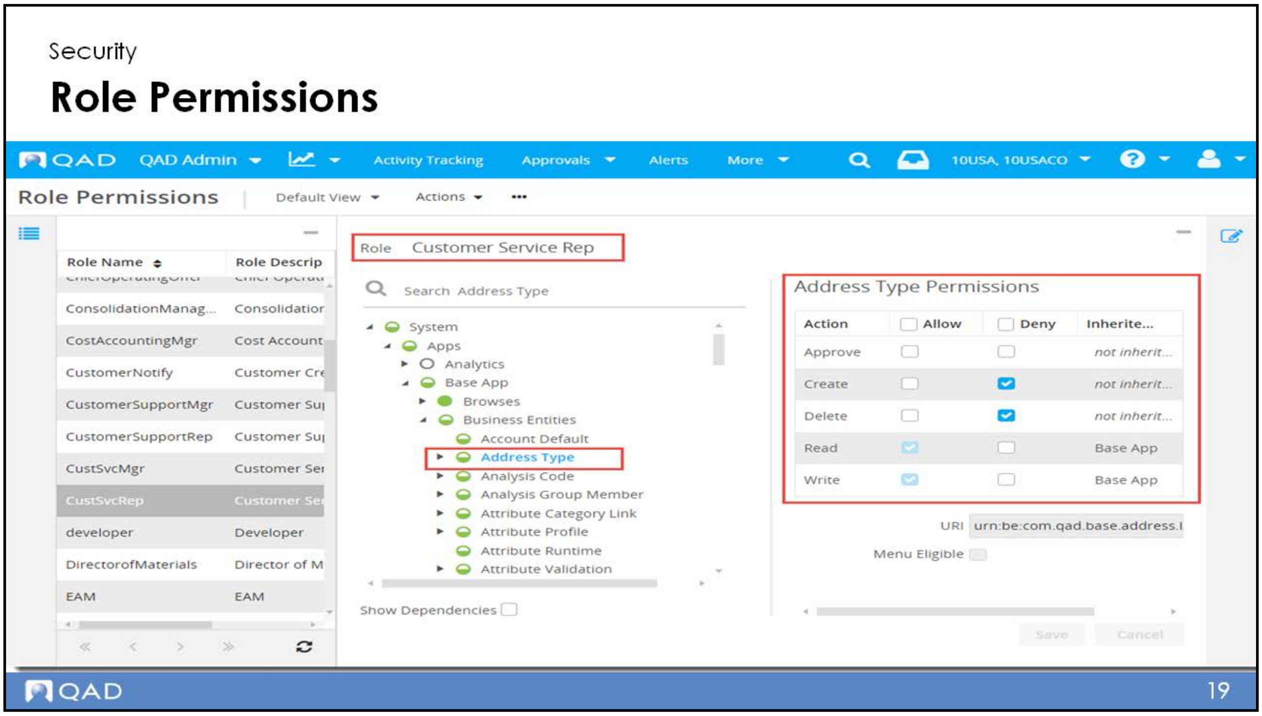


You can set up users, roles, role permissions, and role membership in QAD EE .NET UI. To create a role for the Channel Islands UI, open Role Create in the .NET UI.

You can also maintain the role permissions in both .NET UI and Web UI.

In order to set up security, the logged-in user must have the role of qadadmin.

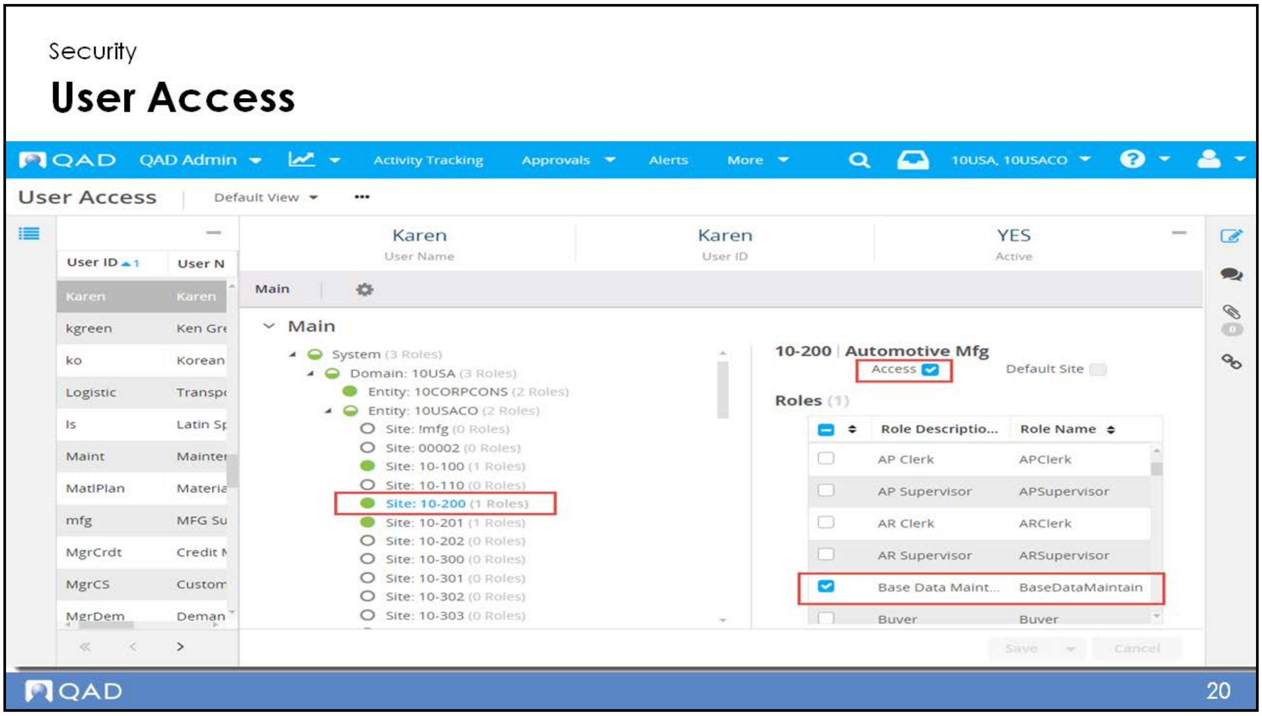
Role Permissions



Use Role Permissions to assign permissions to the role and ensure the role can access the business entities, browses, lookup tables, and dashboard panels required to perform its tasks.

In the role permissions maintenance form, you can explicitly assign Allow or Deny for the actions for the System, Apps, Business entities, Browses, Views, and Reports.

User Access

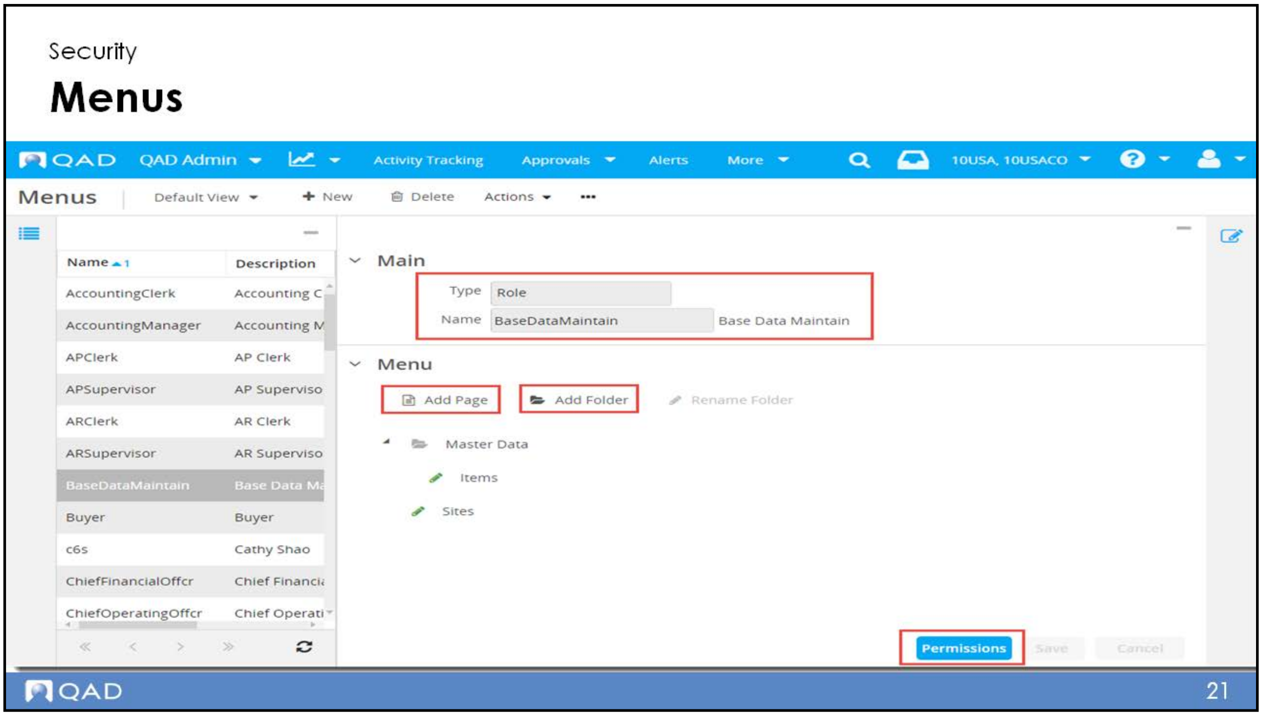


Use User Access to assign Domain, Entity, and Roles to users.

In the User Access maintenance form Main panel, you can expand the “System” tree, click once in Domain, Entity, Site like 10USA, 10USACO, 10-200.

Select the Access and Default check boxes in the selected domain, entity, or site panel. In the “Roles” panel, check the corresponding role(s) for the user.

Menus



Use Menus to assign and organize the menus for a role and also assign the permissions to the menus.

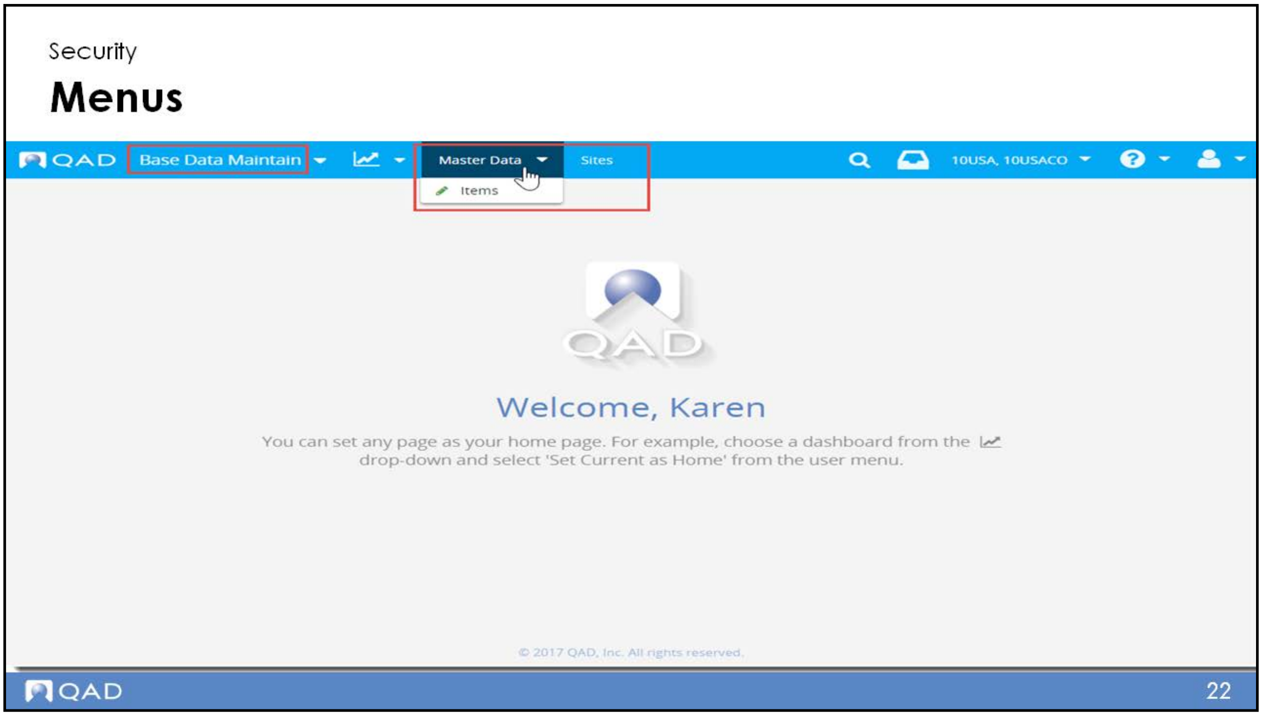
In the Menus maintenance form Main panel, you can select a menu type, either Role or Favorites. If the Type is Role, then you can select an existing role for the menu.

You can click the Add Folder icon to add new folders for menus. You can click the Add Page icon to select the menus from a pop-up screen.

If you want to add the menu at the top level, just leave the folder label blank. You can rename the folder label by selecting the folder and clicking the Rename Folder icon.

You can click the Permissions button to assign permissions to the menus.

Menus



When you log in the user as the role, you can see all the menus assigned in menu permissions.

For our example, you log in as the role Base Data Maintain. You can only see the menu folder Master Data, which include a menu Items and top menu Sites.

Review

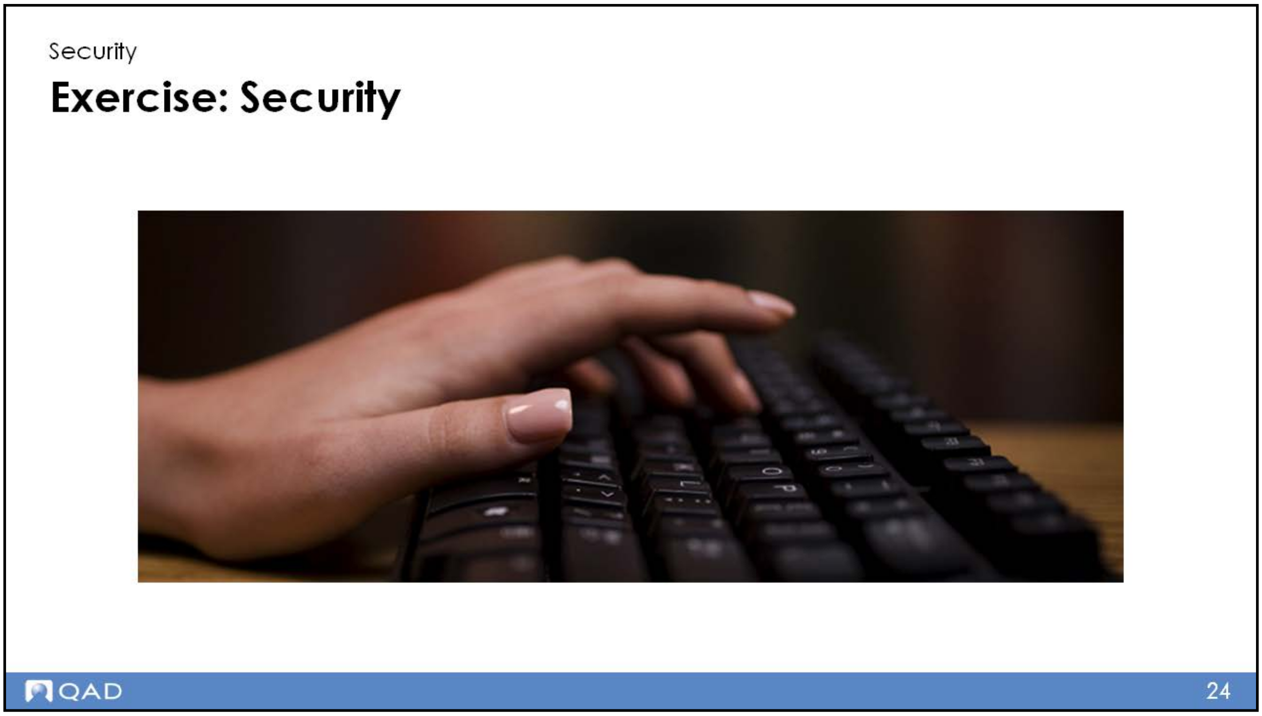
Security

Review

- Role-Based Access Control
- Users, Roles, Role Membership
- Role Permissions
- Resource
- Set Up User, Role, Role Membership
- Role Permissions
- User Access
- Menus

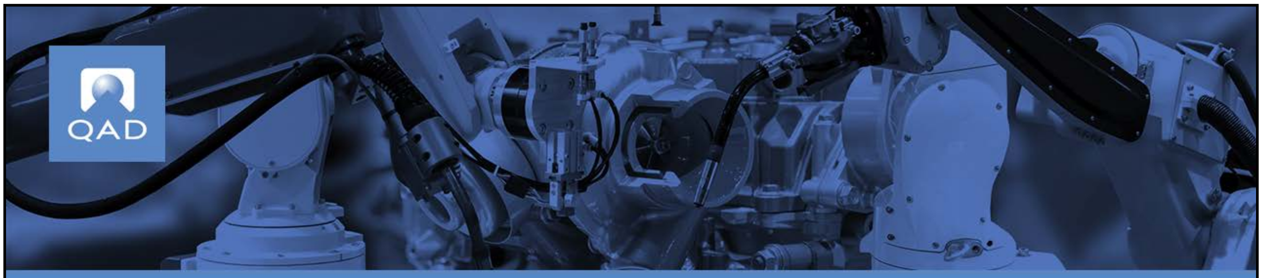
QAD 23

Exercise: Security



CHAPTER 6

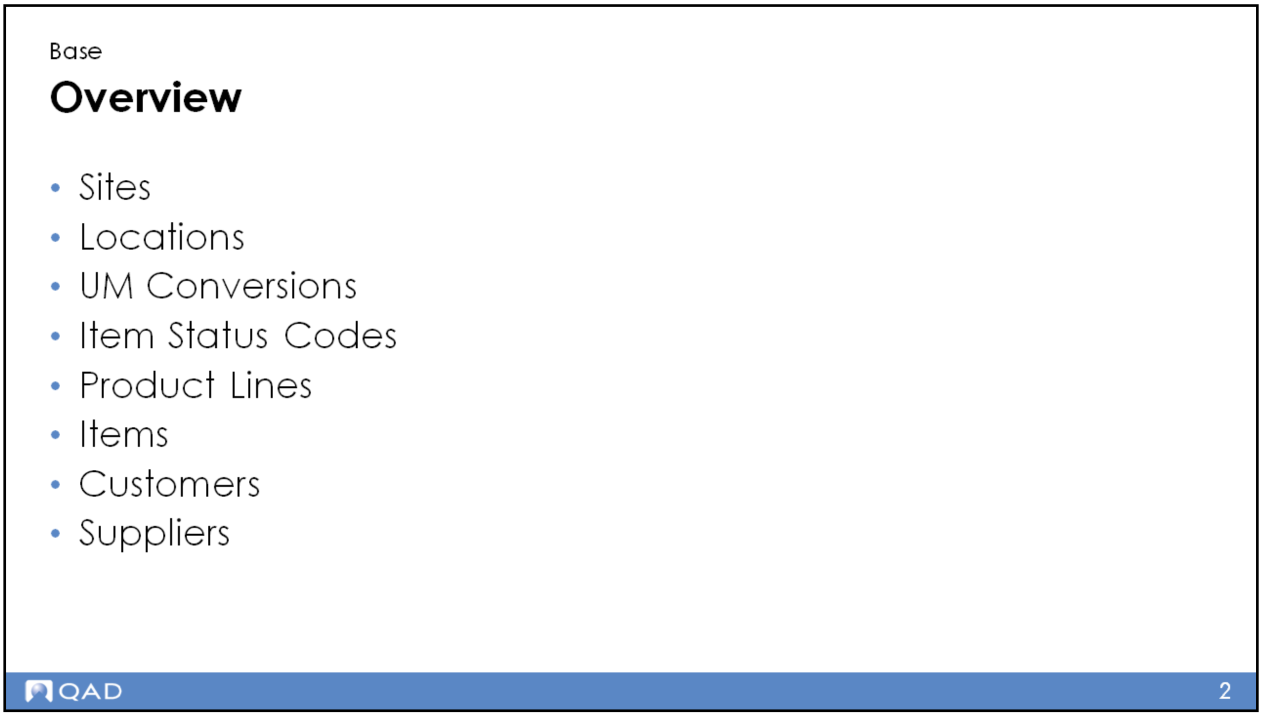
Base



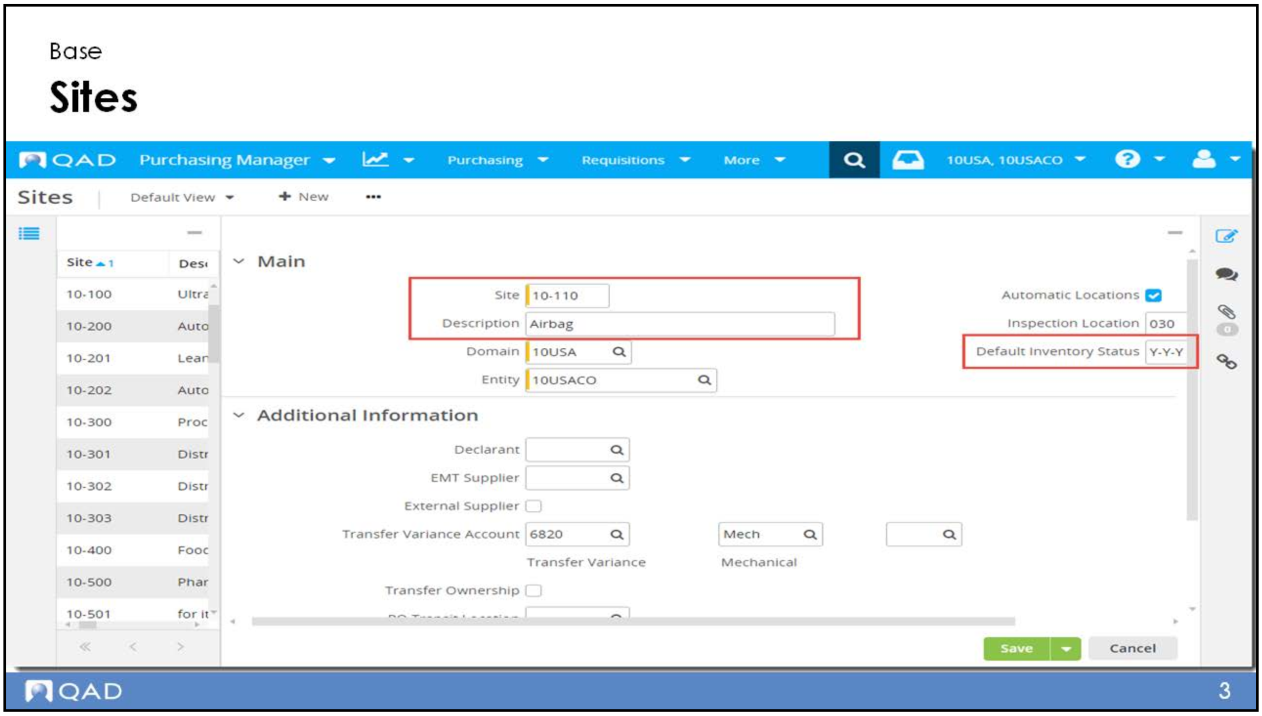
Base

CI Quick Start

Overview

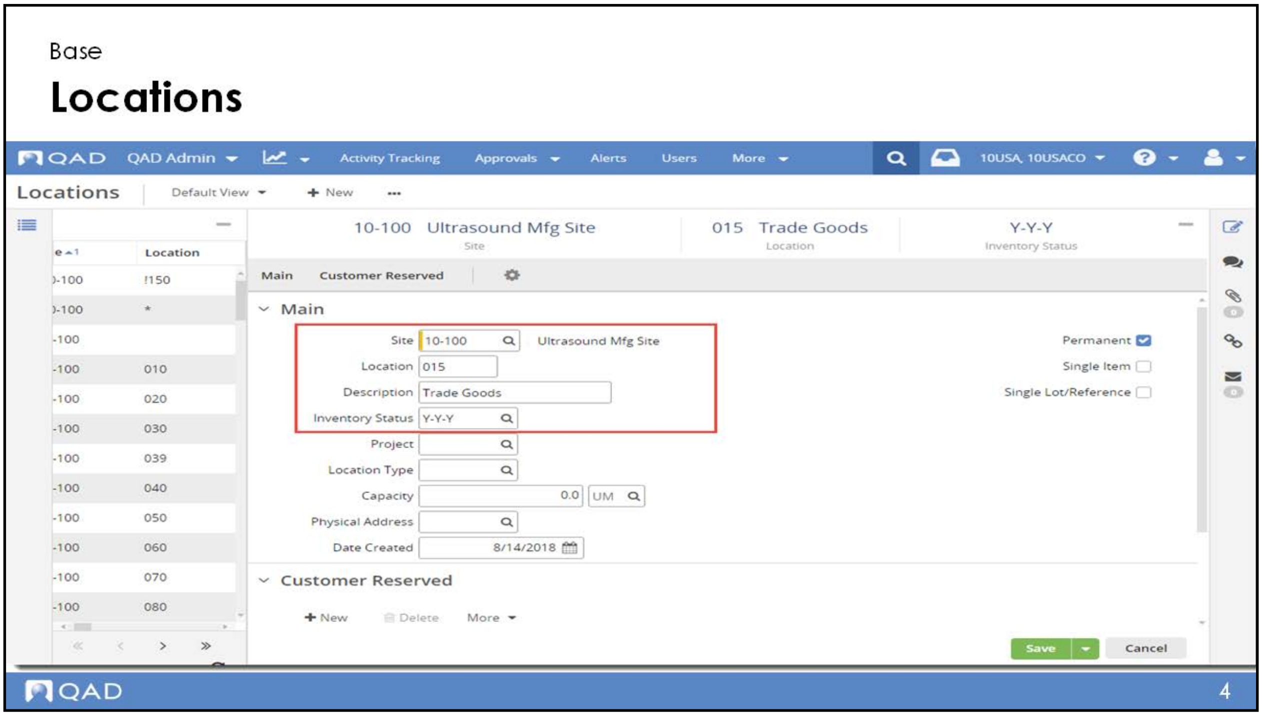

Base
Overview
• Sites
• Locations
• UM Conversions
• Item Status Codes
• Product Lines
• Items
• Customers
• Suppliers
QAD
2

Sites



Use Sites to define records that identify the places where you manufacture or store inventory. A site can be a distribution center, warehouse, manufacturing facility, or a combination of these.

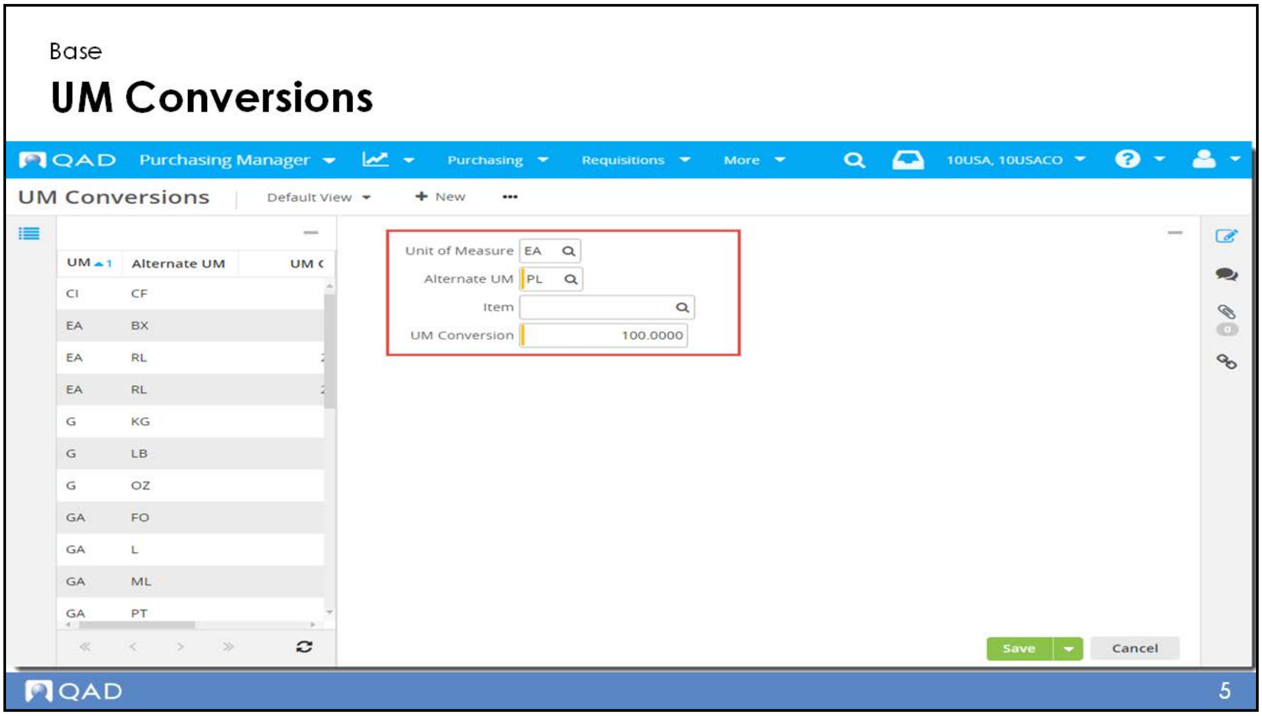
Locations



Use Locations to specify areas within a particular site where inventory is stored. Locations may include shelves, bins, tanks, lots, or other storage areas. Each location's parameters identify what can be stored there and how that inventory can be used.

Assign locations to specific customer addresses in order to ensure adequate inventory supply for sales orders. Reserving a location lets you control how items are allocated, picked, and issued by functions throughout the system.

UM Conversions

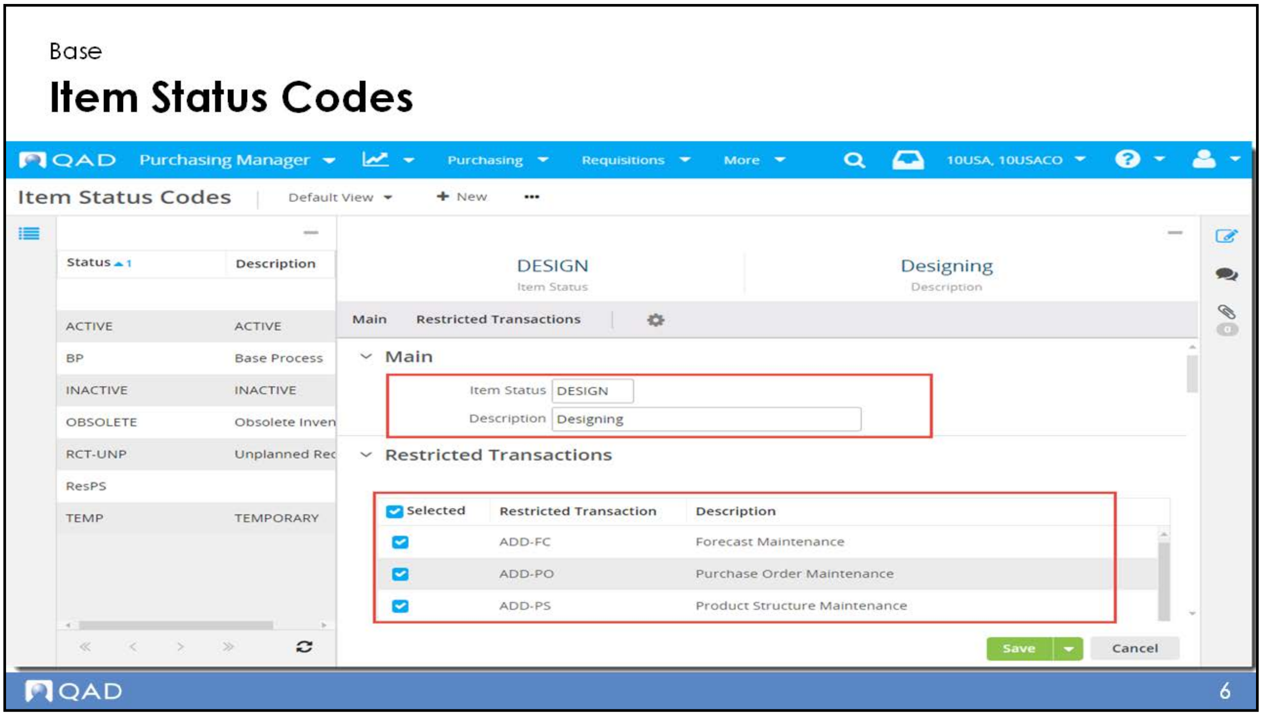


Each item has a unit of measure. All inventory balances are maintained and most planning is done in this unit of measure. However, inventory transactions can be processed in any unit of measure.

Use UM Conversions to define the conversion factor to identify how many stockkeeping units equal one unit of an alternate unit of measure.

You can optionally enter an item number or leave blank if the conversion factor applies to all items.

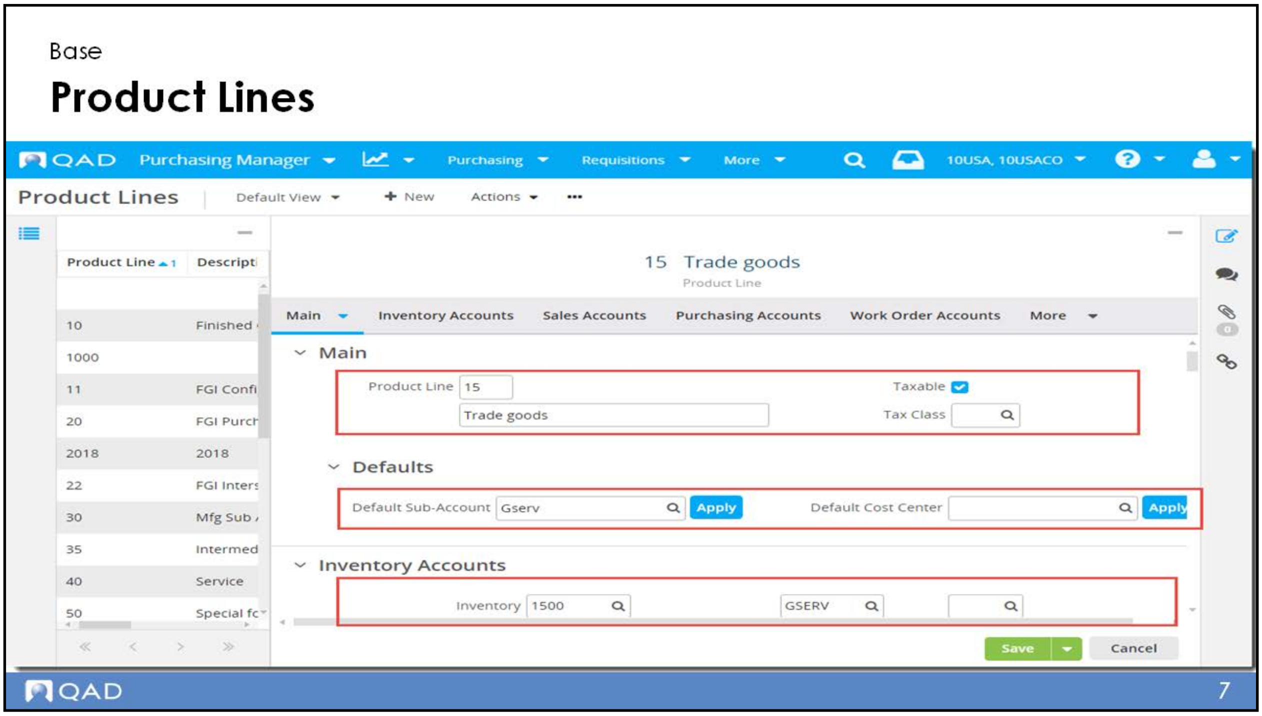
Item Status Codes



Use Item Status Codes to define status codes to associate with items in Items or Item-sites. Status codes indicate where an item is in its life cycle from planning through design, production, and obsolescence.

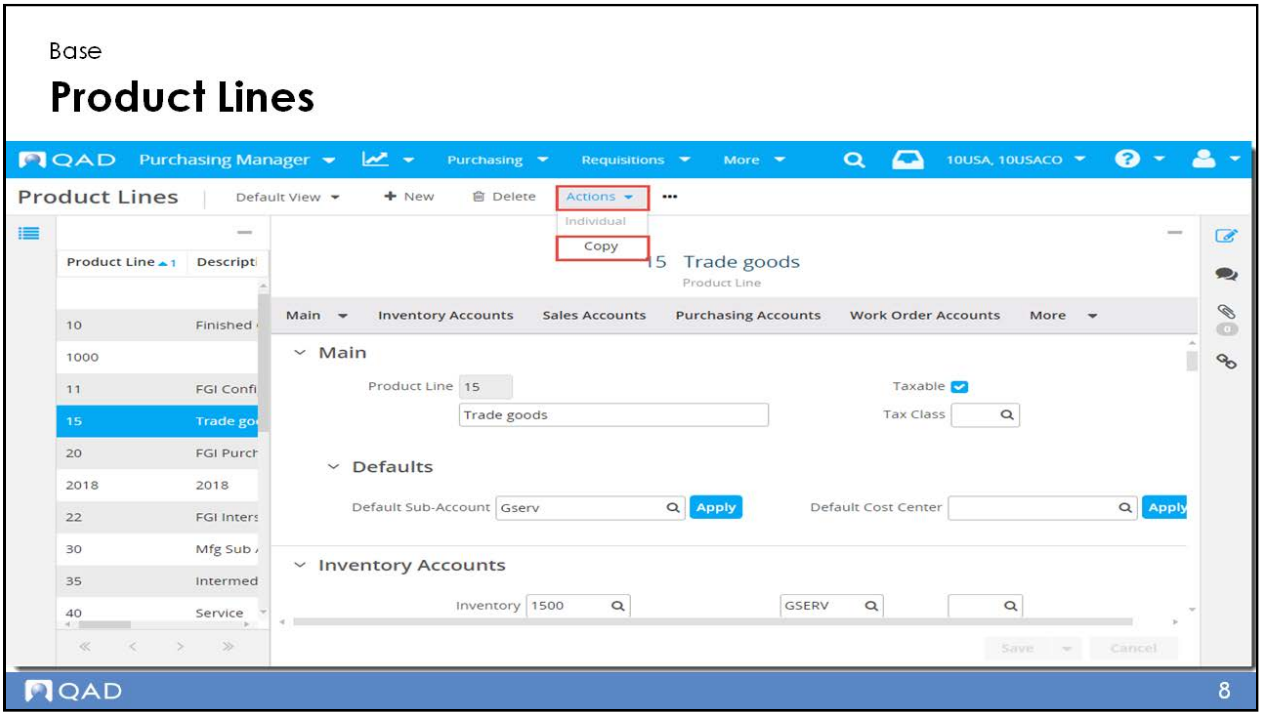
Also use Item Status Codes to restrict which transactions can occur for a particular item. When you process an item transaction, the system checks the item's status code to verify that the transaction is not restricted. If it is, an error message displays and you cannot proceed.

Product Lines



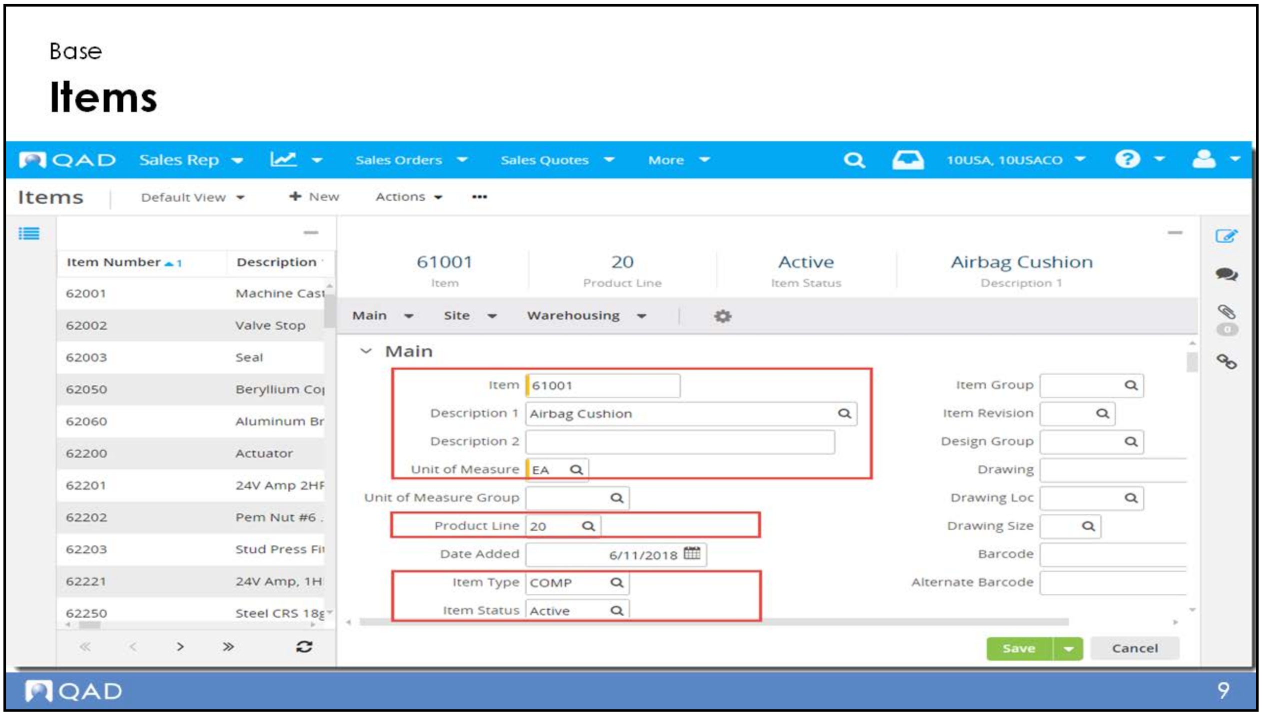
Use Product Lines to define product line codes to group items for reporting, planning, and accounting purposes.

Product Lines



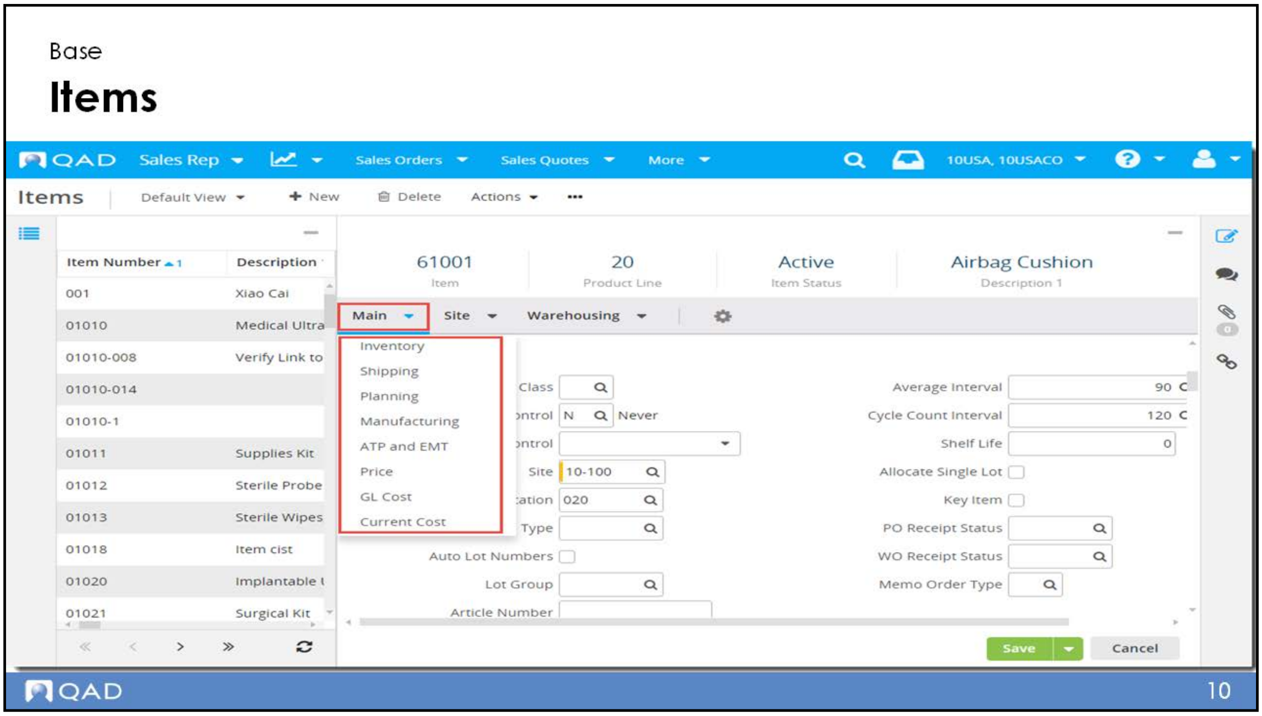
You can also copy an existing product line to a new product line. First select a product line from the product line view. Then click the Actions menu and choose Copy from the drop-down menu.

Items



Use Items to define the items your company uses. These are primarily items stored in inventory and planned by MRP or DRP. However, you can also define other types of items such as planning items, configured products, service kits, and repair parts used in service activities.

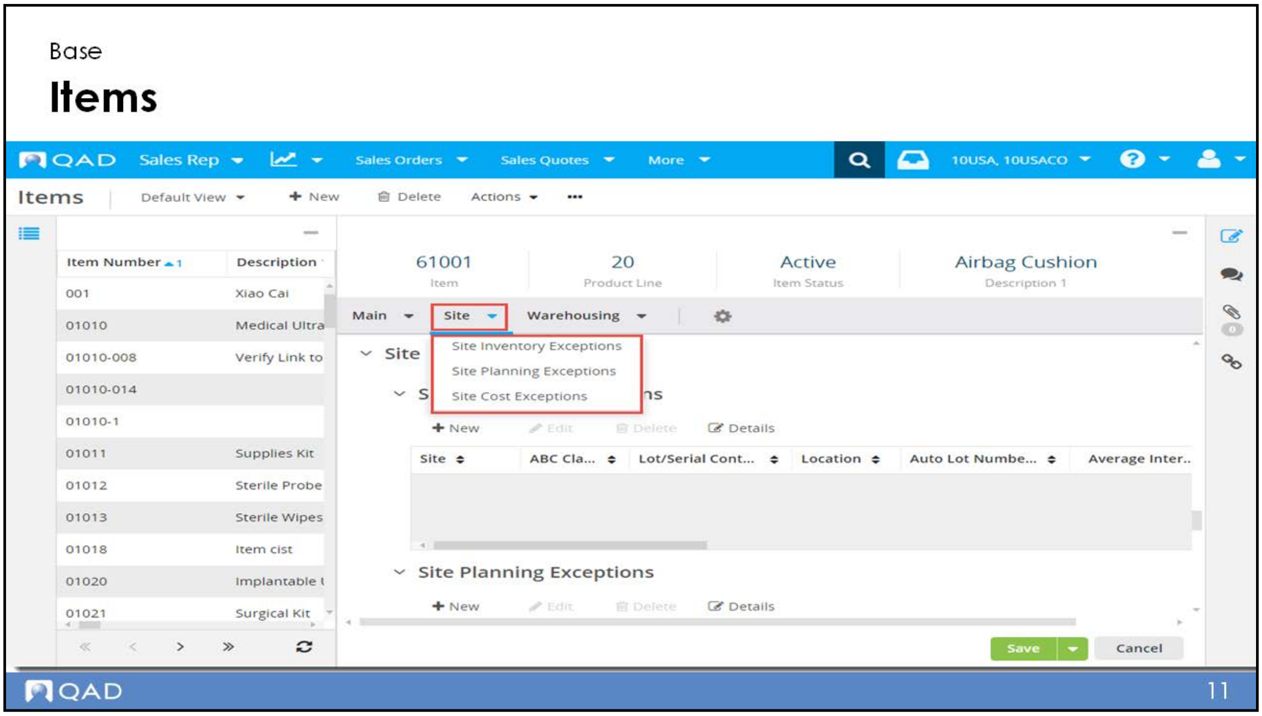
Items



Select a panel from the Main drill-down list and go directly to the item data maintenance section:

- Inventory
- Shipping
- Planning
- Manufacturing
- ATP and EMT
- Price
- GL Cost
- Current Cost

Items



Select a panel from the Site drill-down list and go directly to the item-site exceptions data maintenance section:

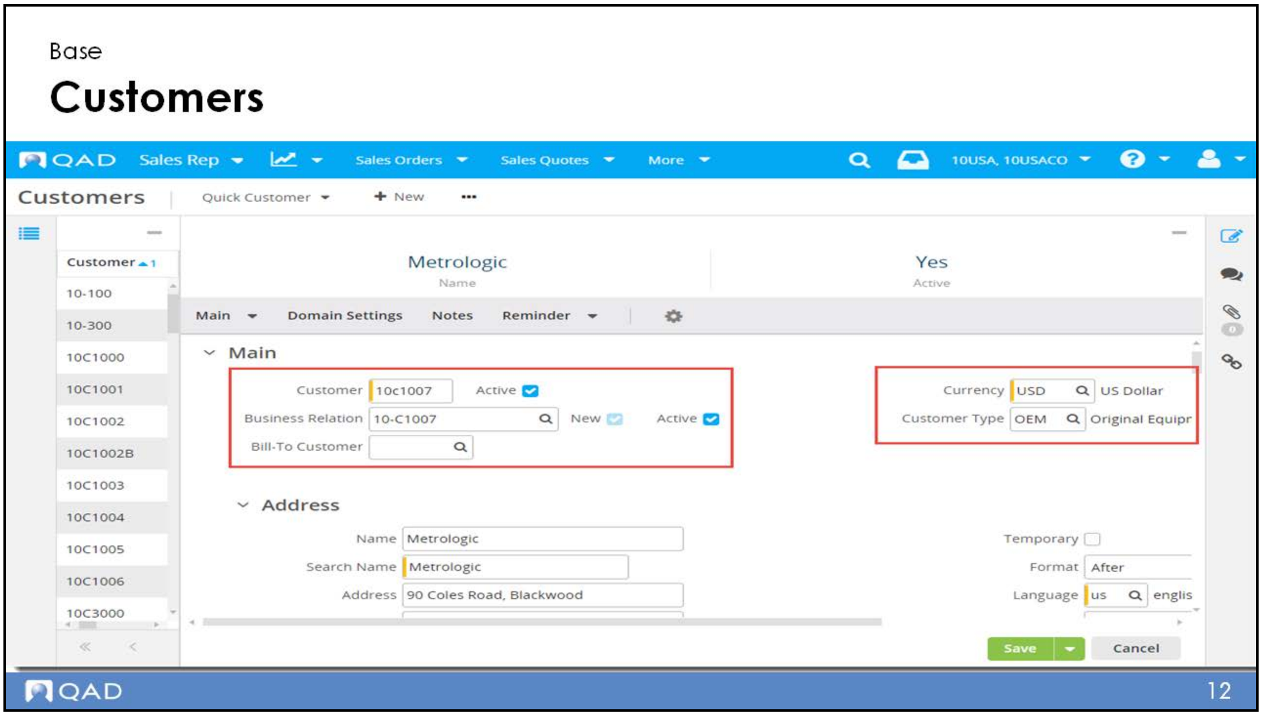
- Site Inventory Exceptions

- Site Planning Exceptions

- Site Cost Exceptions

Click the New icon to add exception data for a specific site.

Customers



Your customers are the companies that purchase your goods and services. They are referenced on sales quotations, sales orders, invoices, and in Accounts Receivable. They are also used for Service and Support documents such as calls, contracts, and return material authorizations (RMAs).

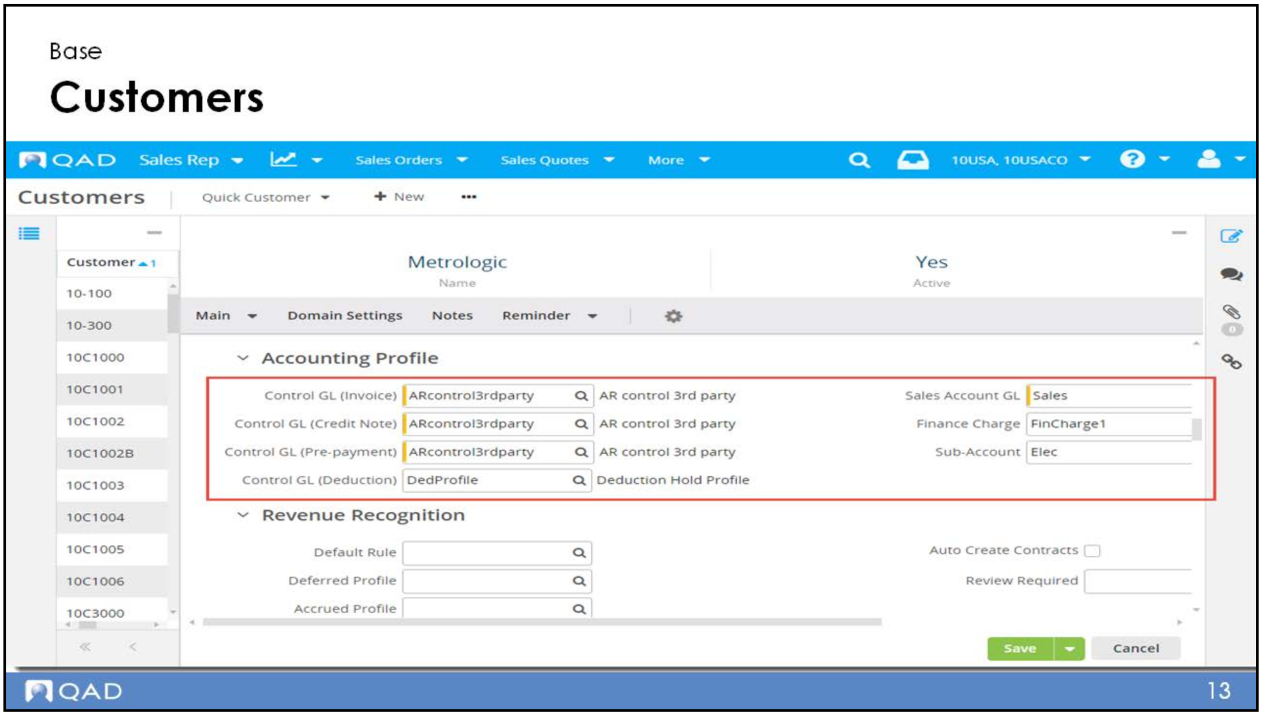
Before setting up customers, you must first define customer type codes and credit rating codes, described next. Customer records also require GL account profiles—control accounts for invoices, control accounts for credit notes, customer bank accounts, and sales accounts.

Use Customers to set up customer records in the system. Enter the customer code, business relation, and optional bill-to customer code. You can specify a default currency code and optional customer type code for this customer.

Choose a business relation code to associate with this customer. Address and contact details default from the headoffice address type of the business relation; you cannot modify the details here. After you have created a customer, you cannot modify the associated business relation.

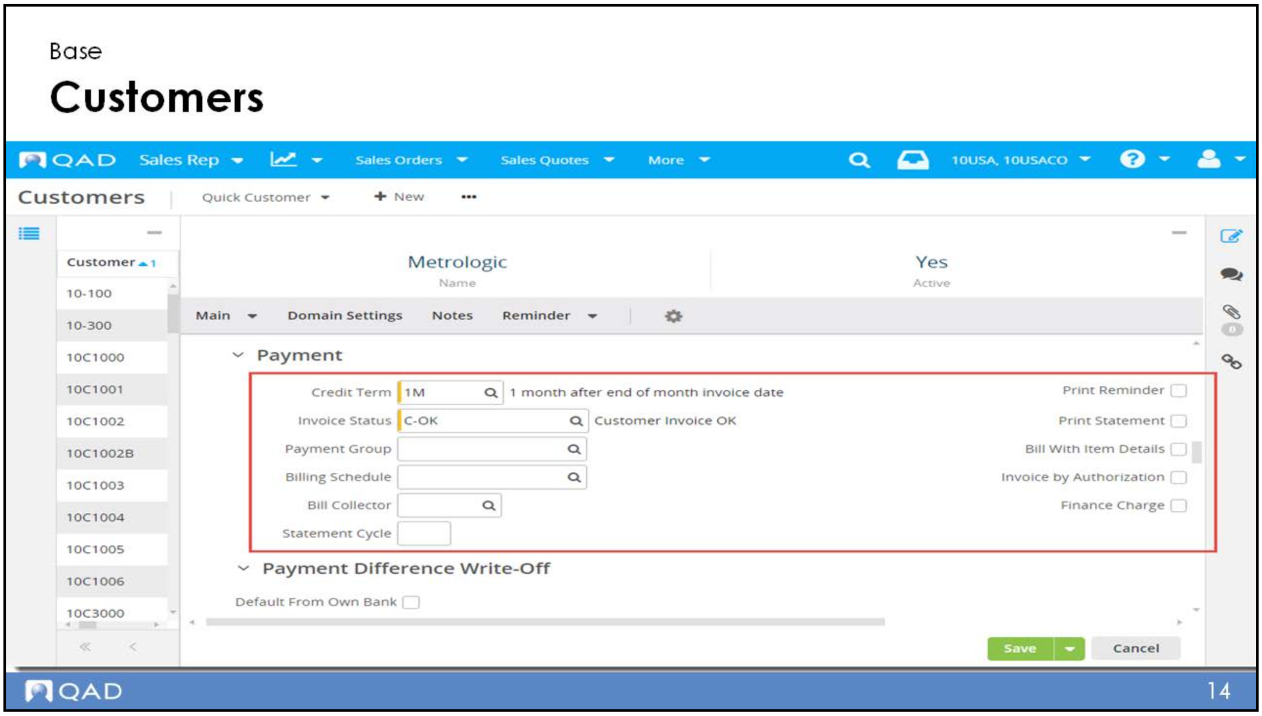
If you enter a new business relation code, enter the business relation information in the Address, Contact Persons, and Business Settings panels.

Customers



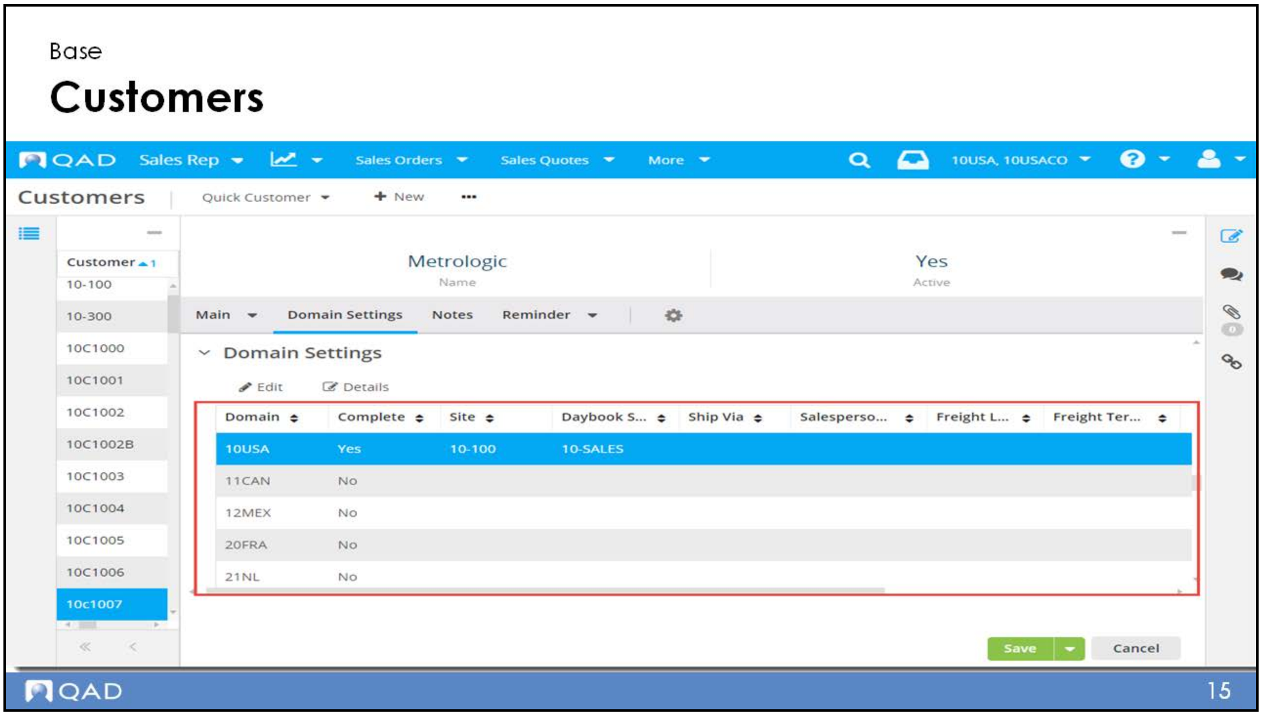
In the Accounting Profile panel, set up the profiles for Invoice Control GL, Credit Note Control GL, Prepayment Control GL, Deduction Control GL, Sales Account GL, Finance Charge, and Sub-Account.

Customers



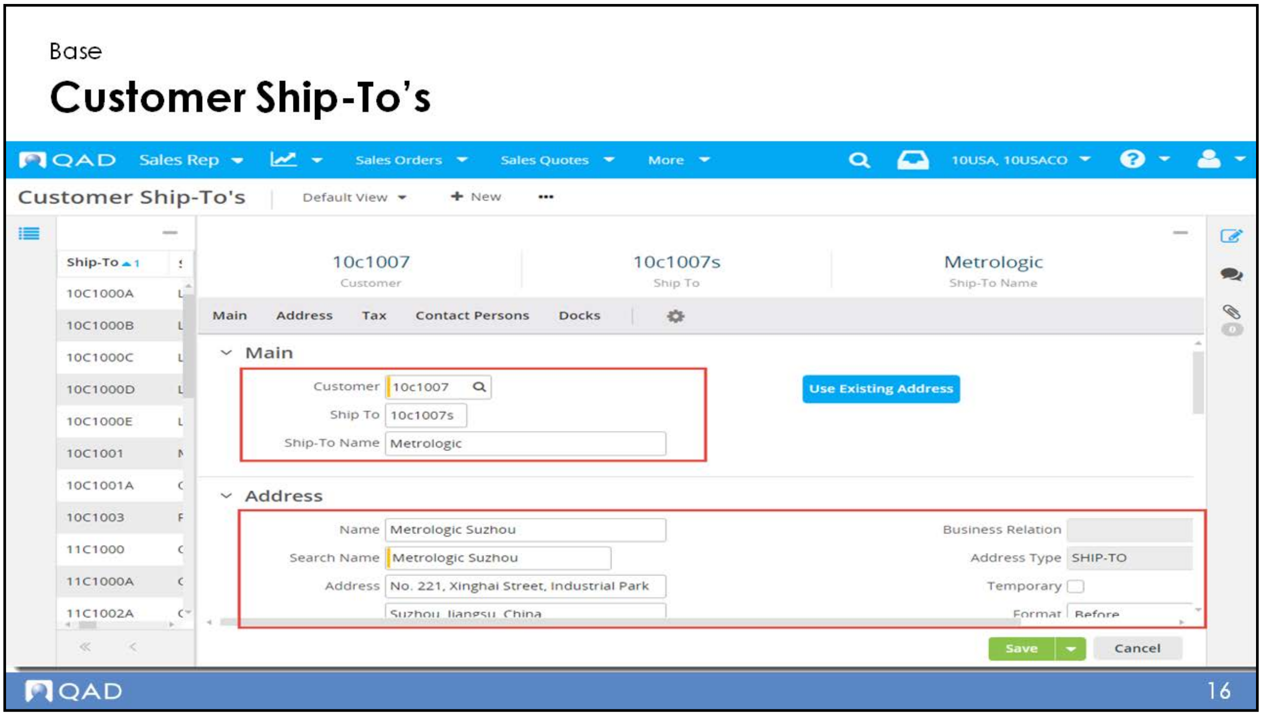
In the Payment panel, set up fields such as Credit Term, Invoice Status, and so on.

Customers



Set up customer domain data in the Domain Settings panel. Select a domain record and click the Edit icon to update the domain-related fields such as Site, Daybook Set, Ship Via, Salesperson, and so on.

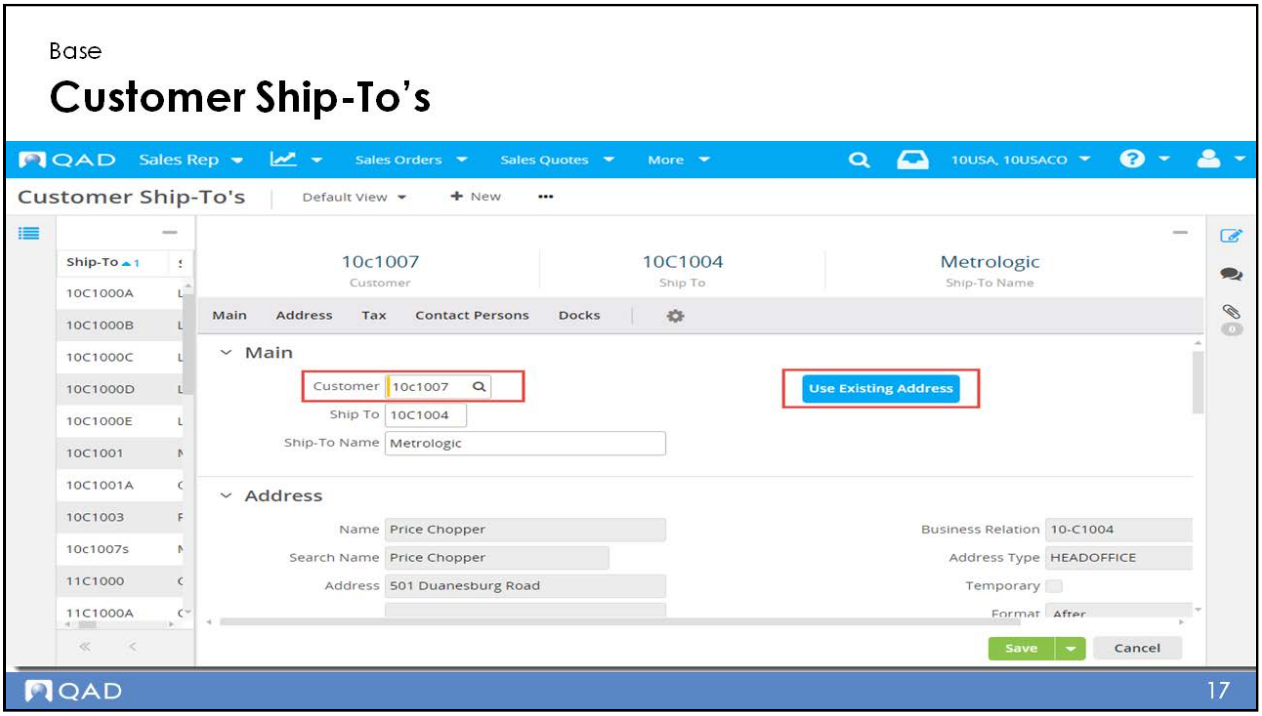
Customer Ship-To’s



Use Customer Ship-To’s to create customer ship-to records.

Enter the customer, ship-to code, and ship-to name. You can directly enter the address information for the ship-to, and the system will add a new address line in the customer business relation with the address type of “SHIP-TO”.

Customer Ship-To's

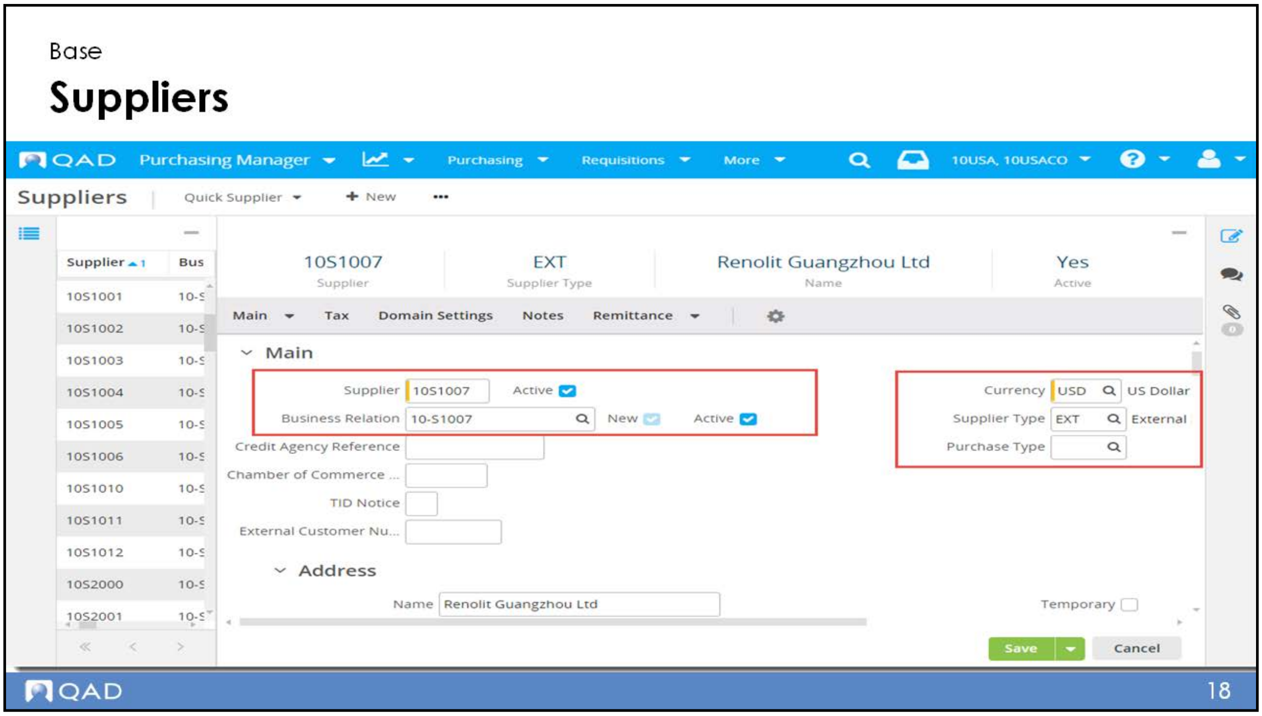


You can indicate another customer as a ship-to address. Or you can indicate a customer's end user as a ship-to address.

You can also specify a new ship-to code and associate it with an existing address with the ship-to type defined for a customer's business relation.

For example, enter a customer code and click the Use Existing Address button.

Suppliers



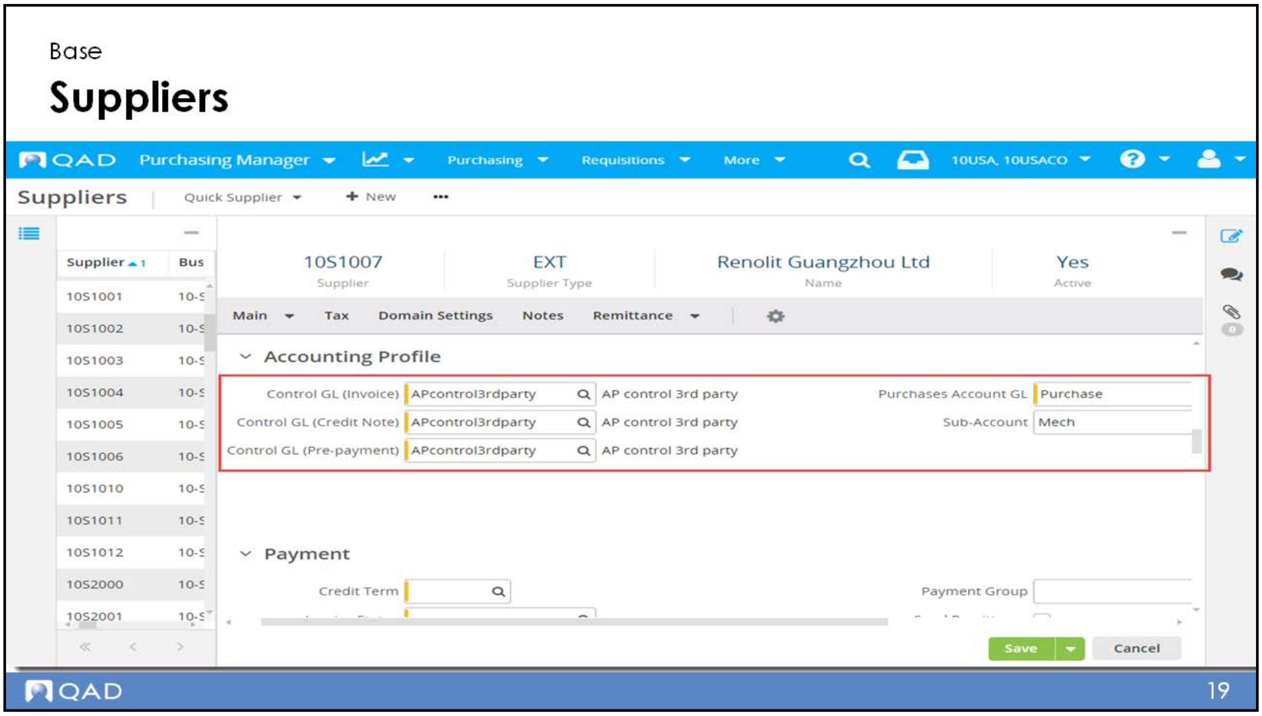
Use Suppliers to set up codes representing the companies you purchase goods and services from. Suppliers are used in purchasing, accounts payable, Service and Support Management, and other functions. Before setting up suppliers, you must first define payment formats, payment groups, bank account numbers, supplier types, and so on.

In the Main panel, you enter the supplier code and business relation. You can specify a default currency code and optional supplier type code for this supplier.

Choose a business relation code to associate with this supplier. Address and contact details default from the headoffice address type of the business relation; you cannot modify the details here. After you have created a supplier, you cannot modify the associated business relation.

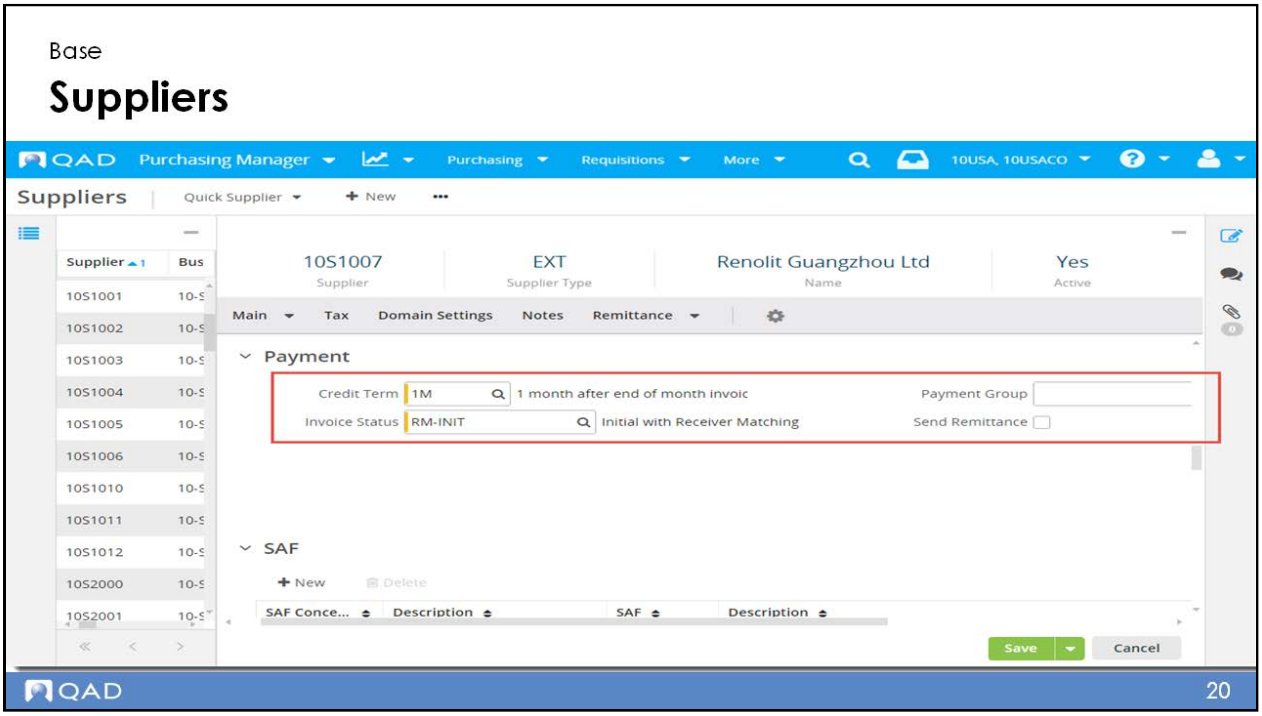
If you enter a new business relation code, enter the business relation information in the Address, Contact Persons, and Business Settings panels.

Suppliers



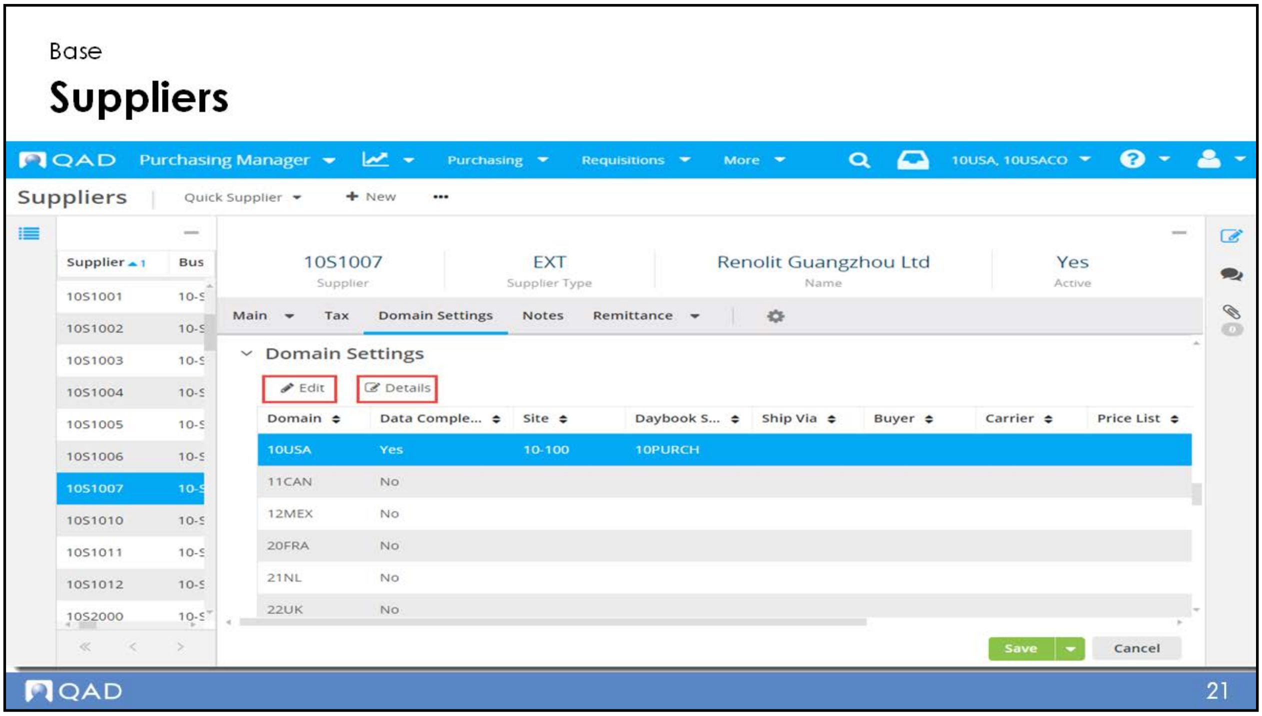
In the Accounting Profile panel, you can set up the profiles for Invoice Control GL, Credit Note Control GL, Prepayment Control GL, Deduction Control GL, Sales Account GL, Finance Charge, and Sub-Account.

Suppliers



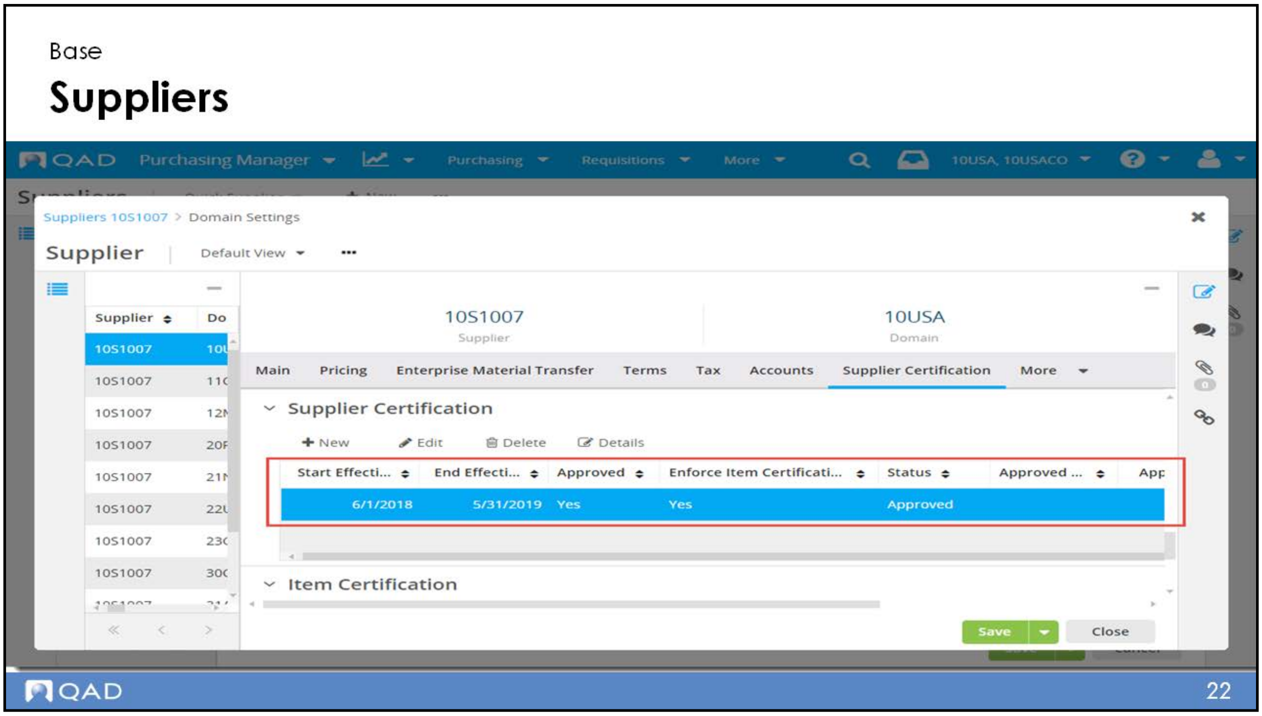
In the Payment panel, you can set up fields such as Credit Term, Invoice Status, Payment Group, and so on.

Suppliers



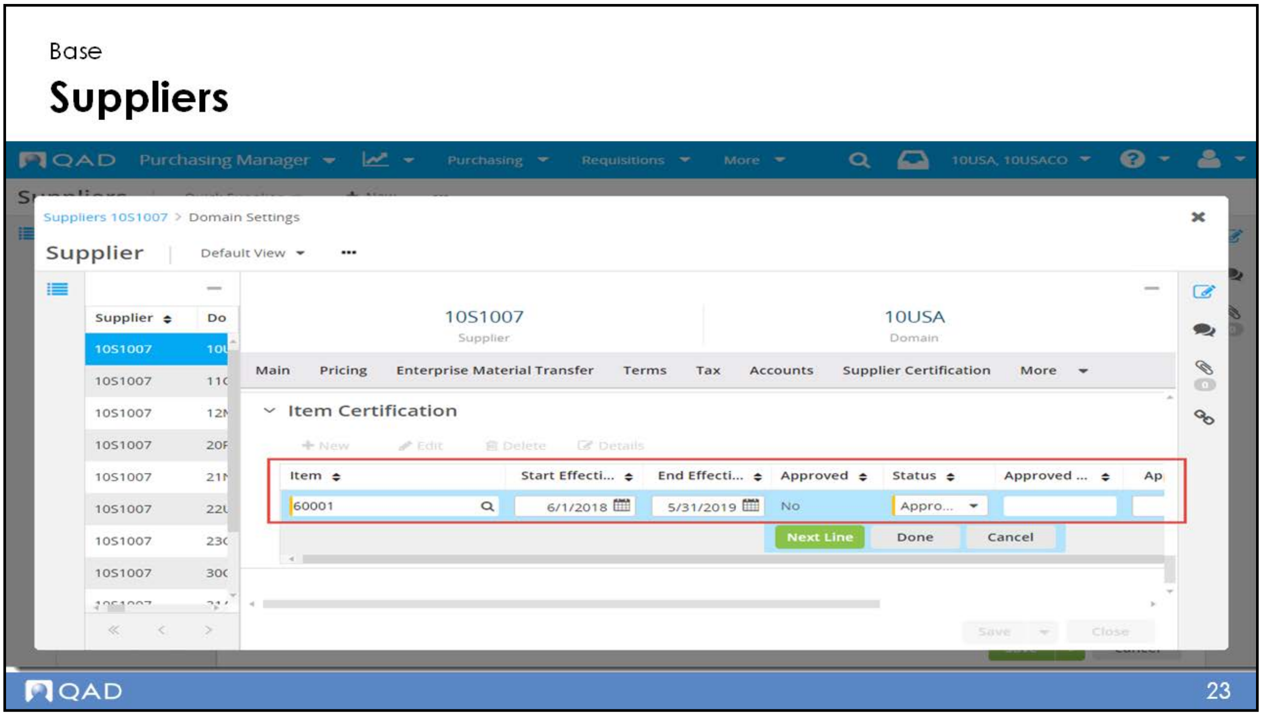
You can set up supplier domain data in the Domain Settings frame. You can select a domain record and click the Edit icon to update domain-related fields such as Site, Daybook Set, Ship Via, Buyer, and so on.

Suppliers



In the Domain Settings details panel, click the New icon to enter supplier certification information such as Start and End Effective dates, Enforce Item Certification, Status, and so on.

Suppliers



In the Domain Settings details panel, click the New icon to enter item certification information such as Item number, Start and End Effective dates, Status, and so on.

Review

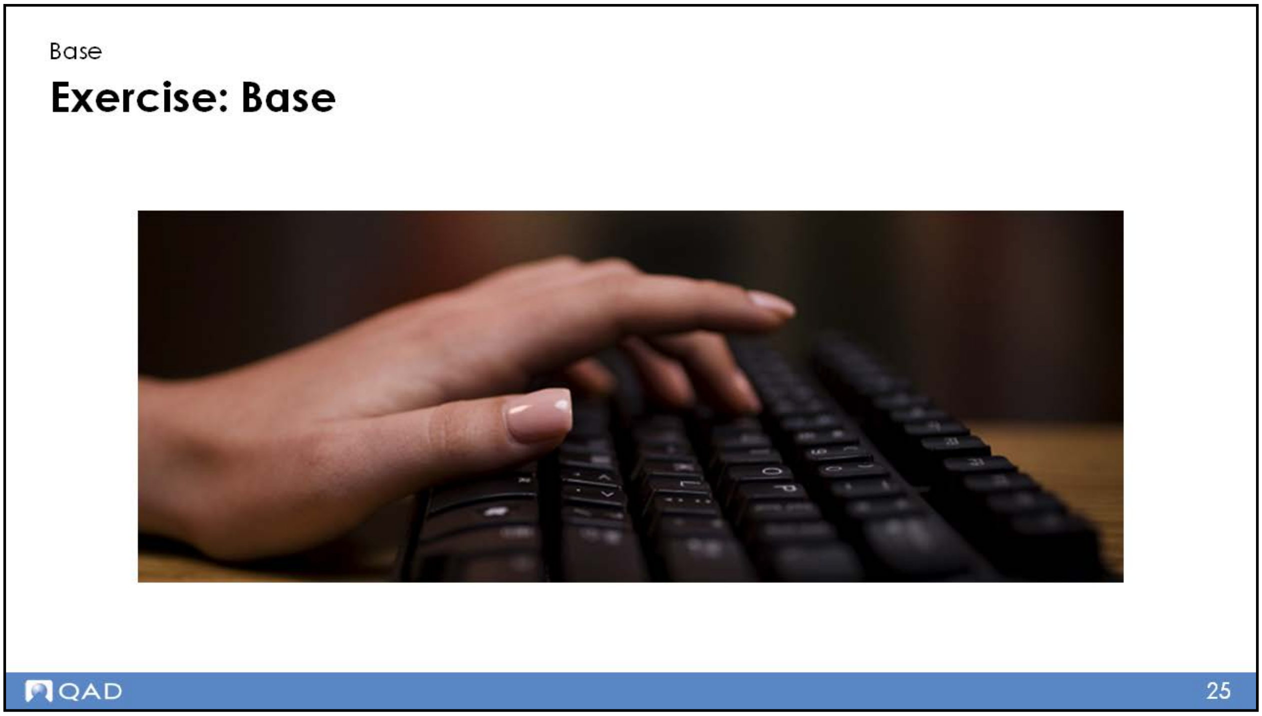
Base

Review

- Sites
- Locations
- UM Conversions
- Item Status Codes
- Product Lines
- Items
- Customers
- Suppliers

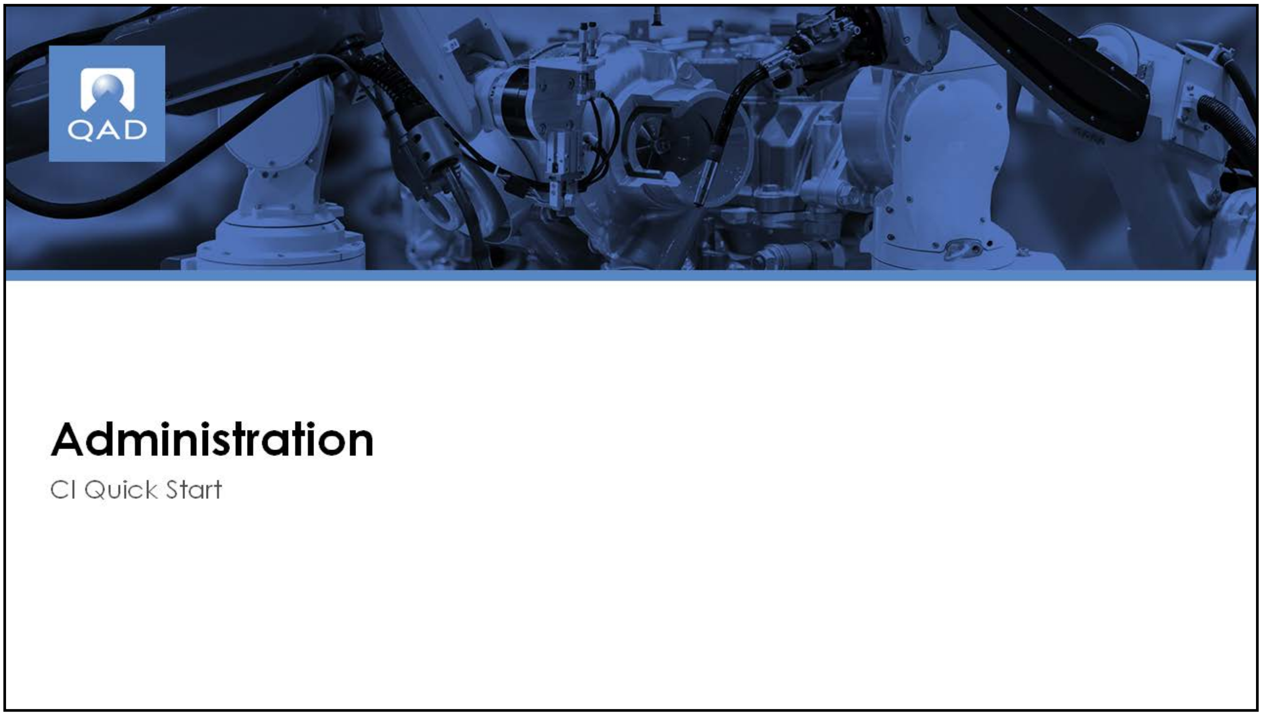
QAD 24

Exercise: Base



CHAPTER 7

Administration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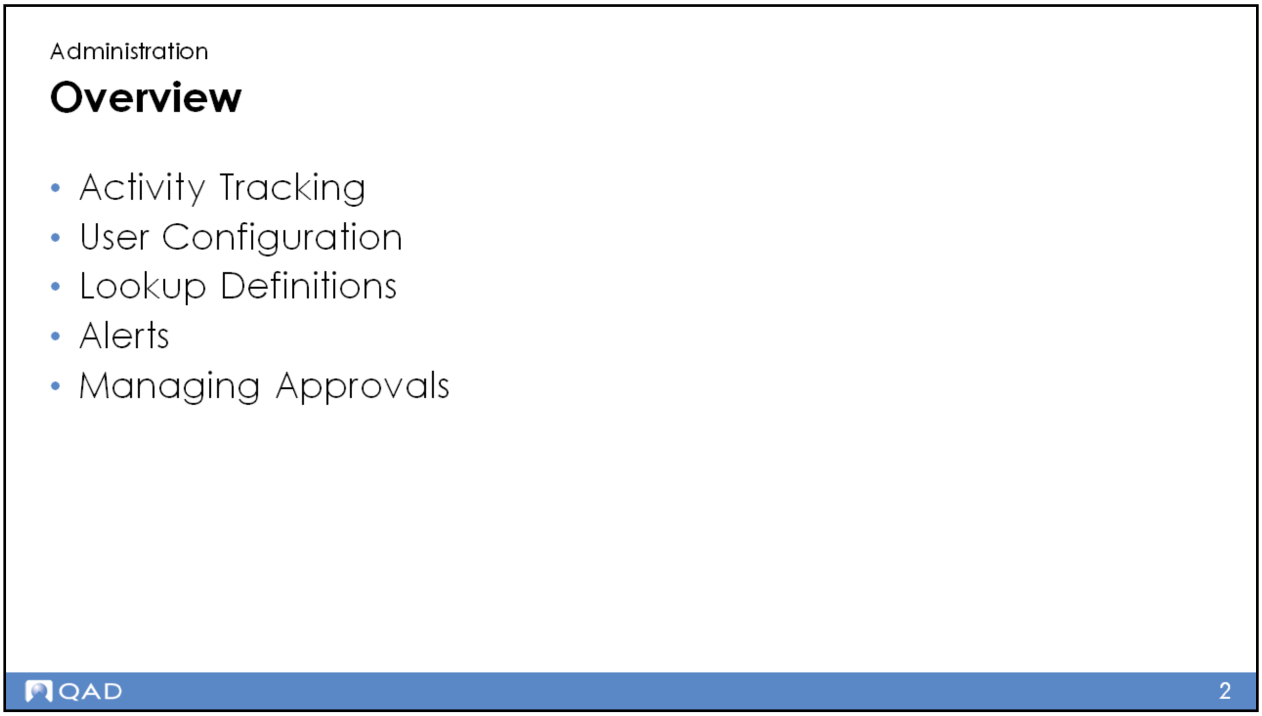
Administration
CI Quick Start

Overview


Administration
Overview
• Activity Tracking
• User Configuration
• Lookup Definitions
• Alerts
• Managing Approvals
QAD
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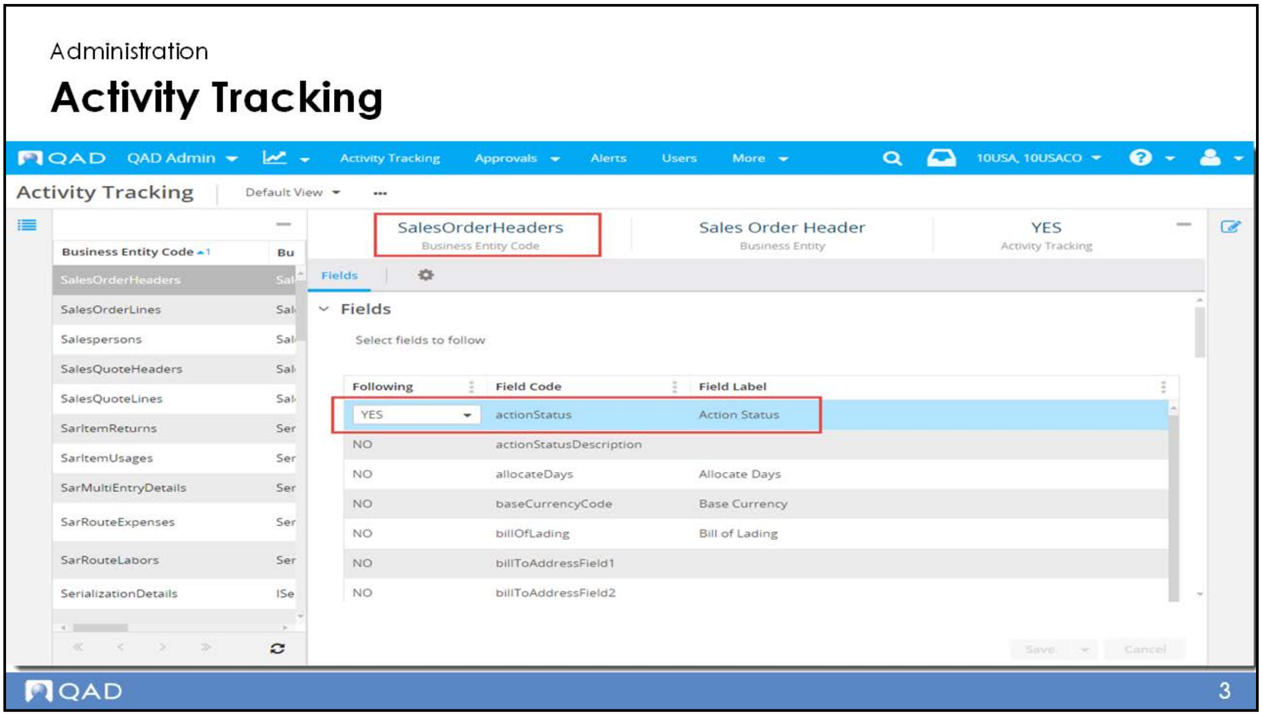
Activity Tracking



The system can track field changes, comments, and attachment uploads for the current record (such as a field) and display them in the Activity panel.

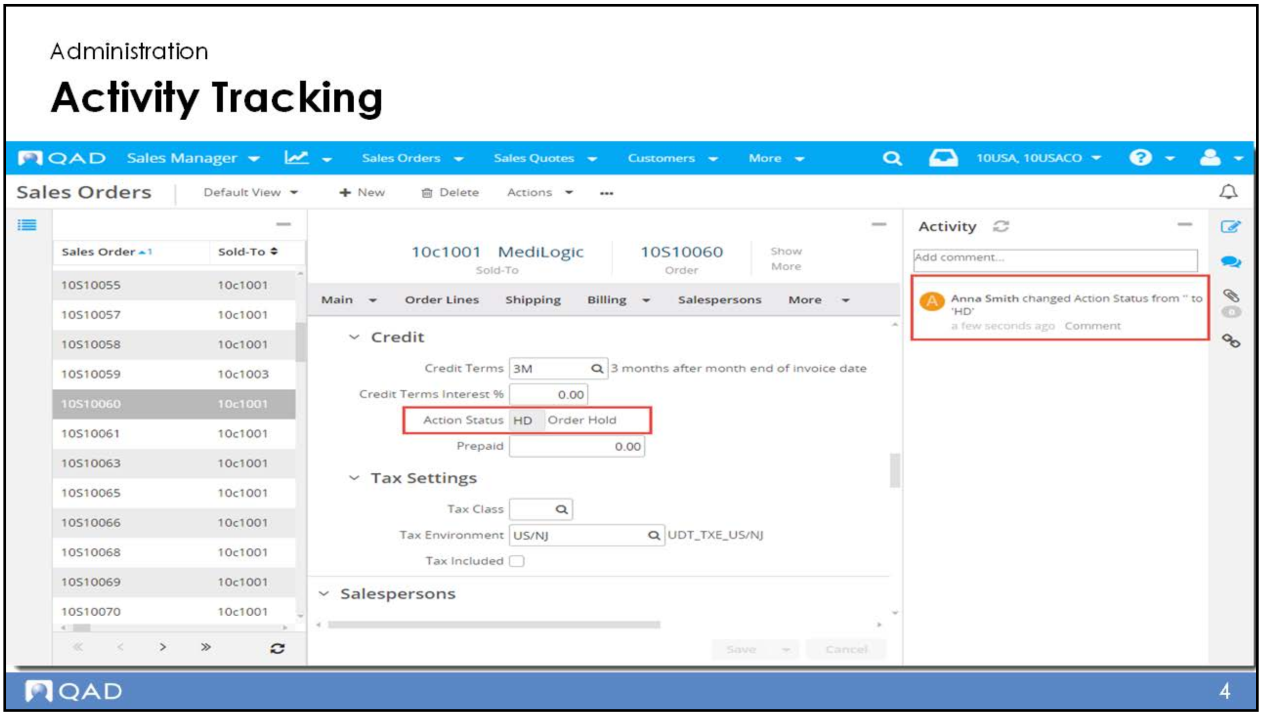
By default, not all field activity can be tracked. As an administrator, you can specify which fields can be tracked using Activity Tracking.

In the Activity Tracking view, you can configure what users can track based on business entity. The Activity Tracked column indicates whether the business entity is being tracked (Yes or No).

For each field, in the edit form, you can choose whether the field can be tracked as part of Activity Tracking.

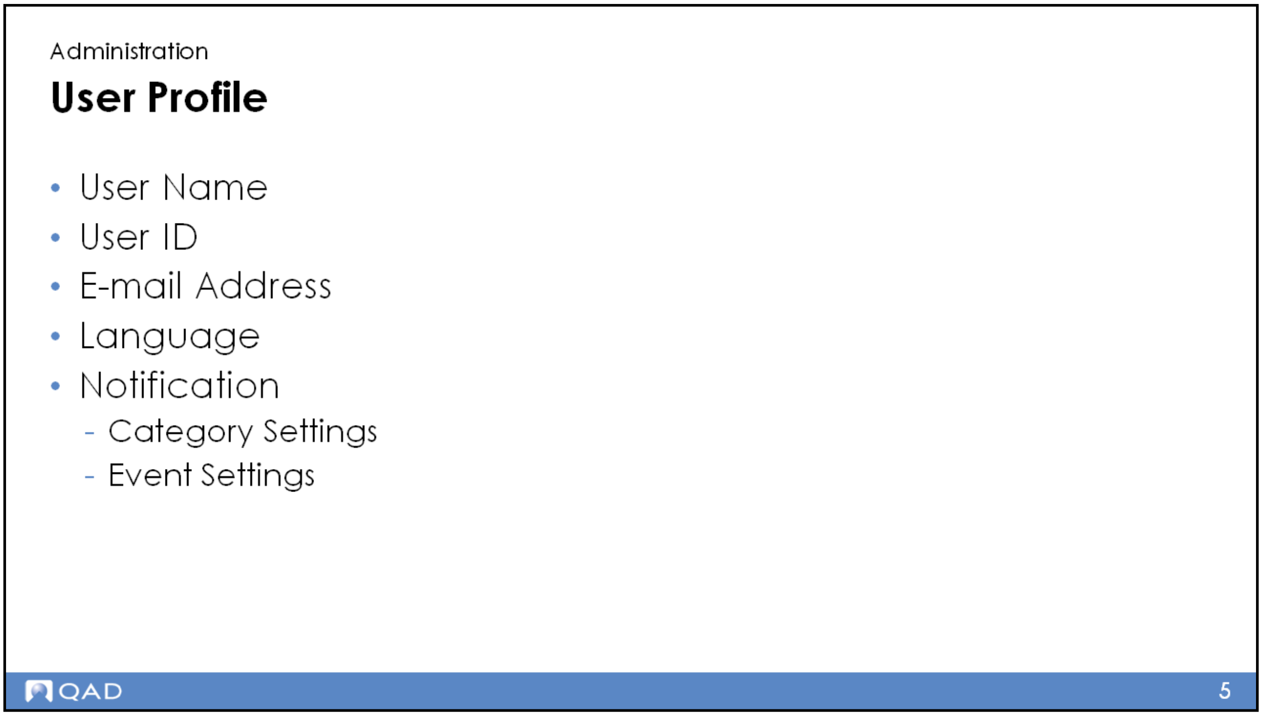
For example, you can edit the business entity SalesOrderHeaders fields by double-clicking the row. Then you can choose Yes for the Action Status field.

Activity Tracking

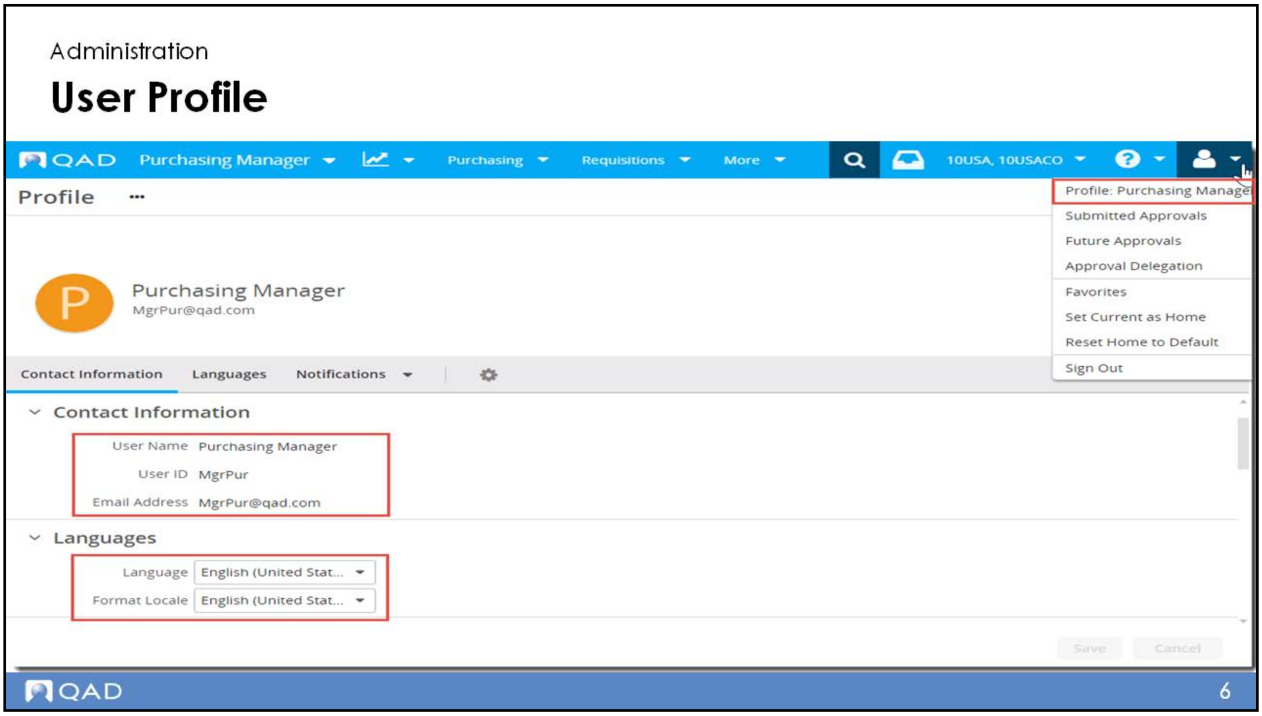


When a user changes a sales order’s Action Status field, the system records the activity. You can see the history of the transaction in the Activity panel.

User Profile



User Profile



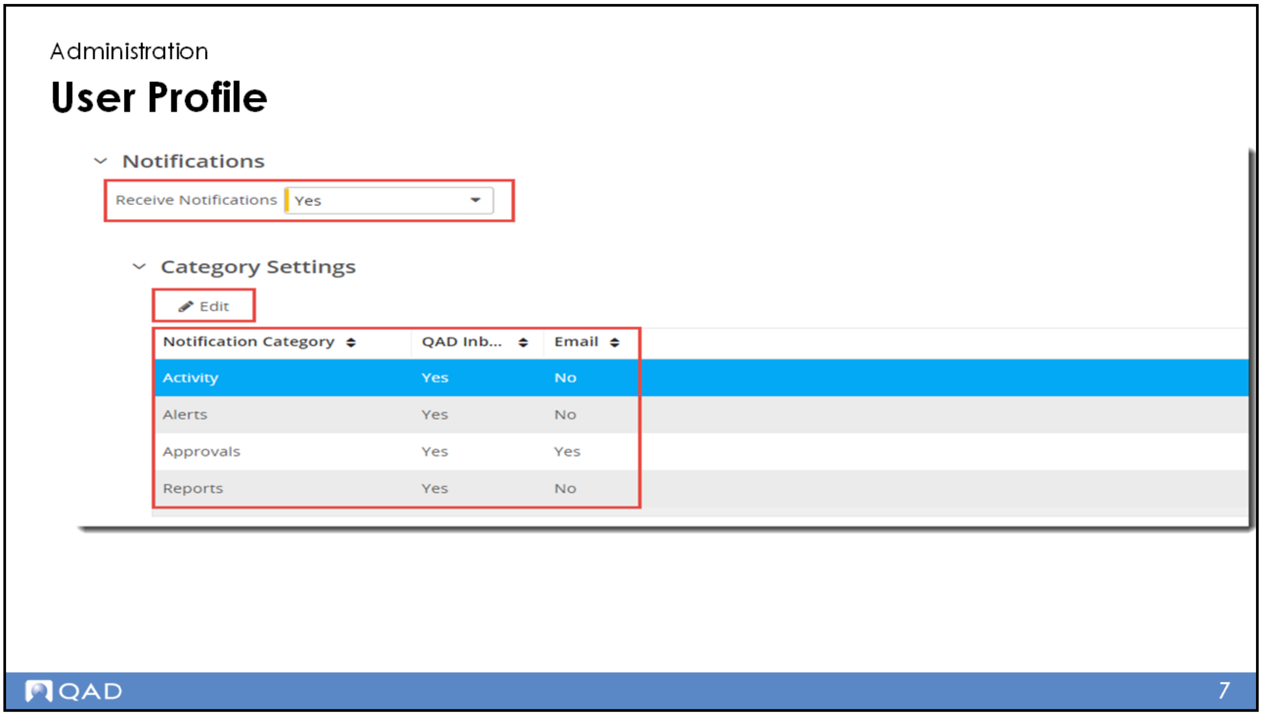
Choose User Profile from the menu bar user options drop-down list.

You can view User Name, ID, and Email Address in the Contact Information panel.

You can change the Language and Format Locale by selecting from the drop-downs for these fields in the Languages panel.

Note that any profile changes will take effect the next time you sign in to QAD.

User Profile

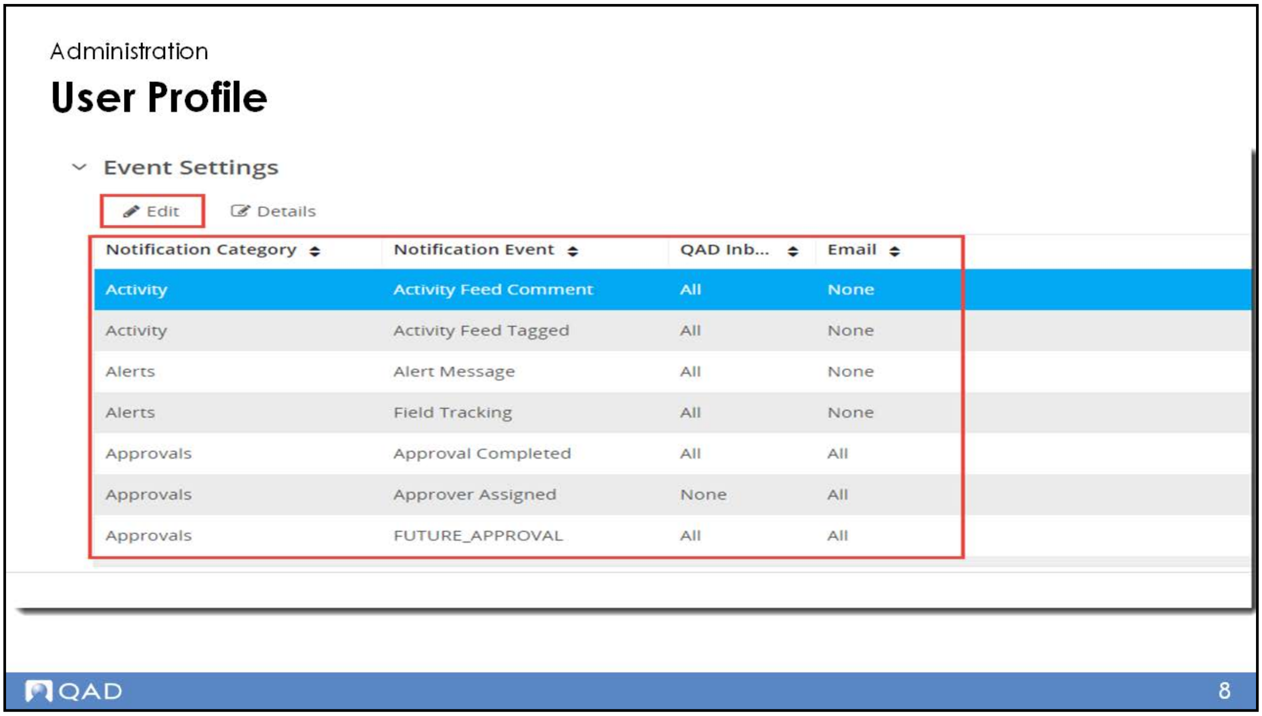


In the Notification panel, you can set up user notification preferences.

Choose Receive Notification to enable user notification.

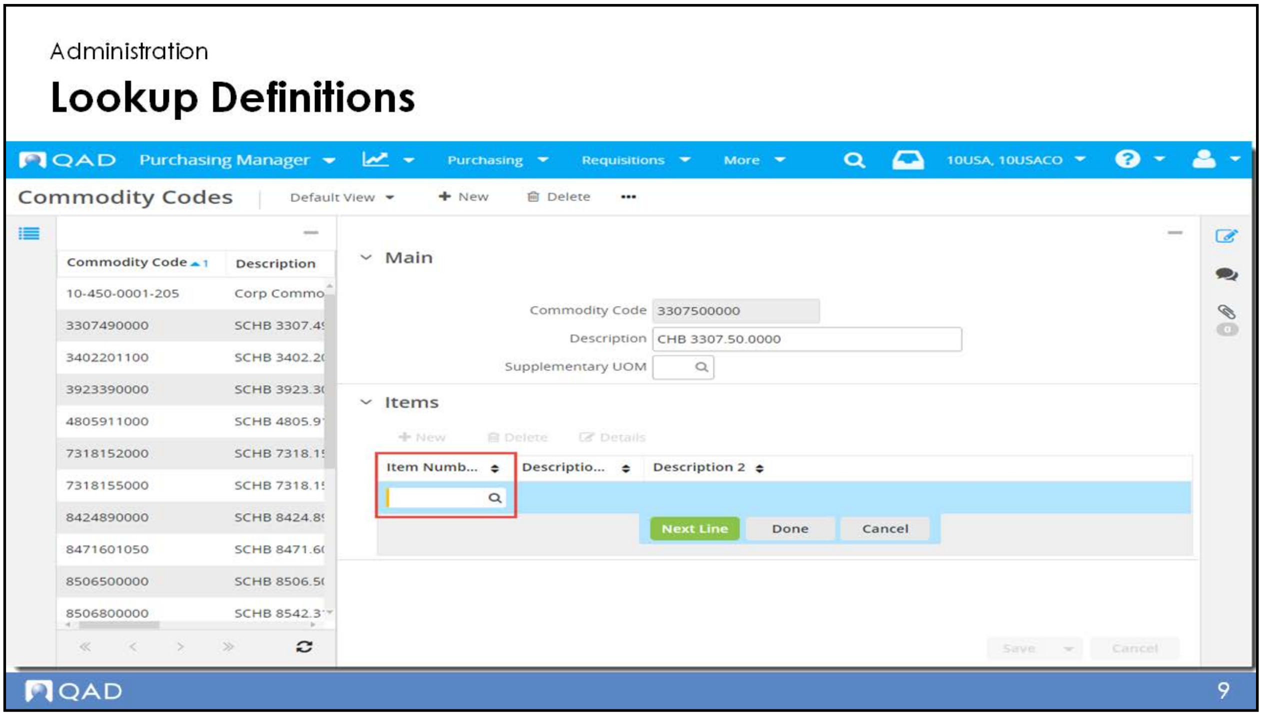
You can set up notifications by four categories: Activity, Alerts, Approvals, and Reports. For each category, you can choose to receive notification by QAD Inbox, by Email, or both.

User Profile



You can set up notifications further by category then by event. For a category, you can choose how to receive notifications for different events.

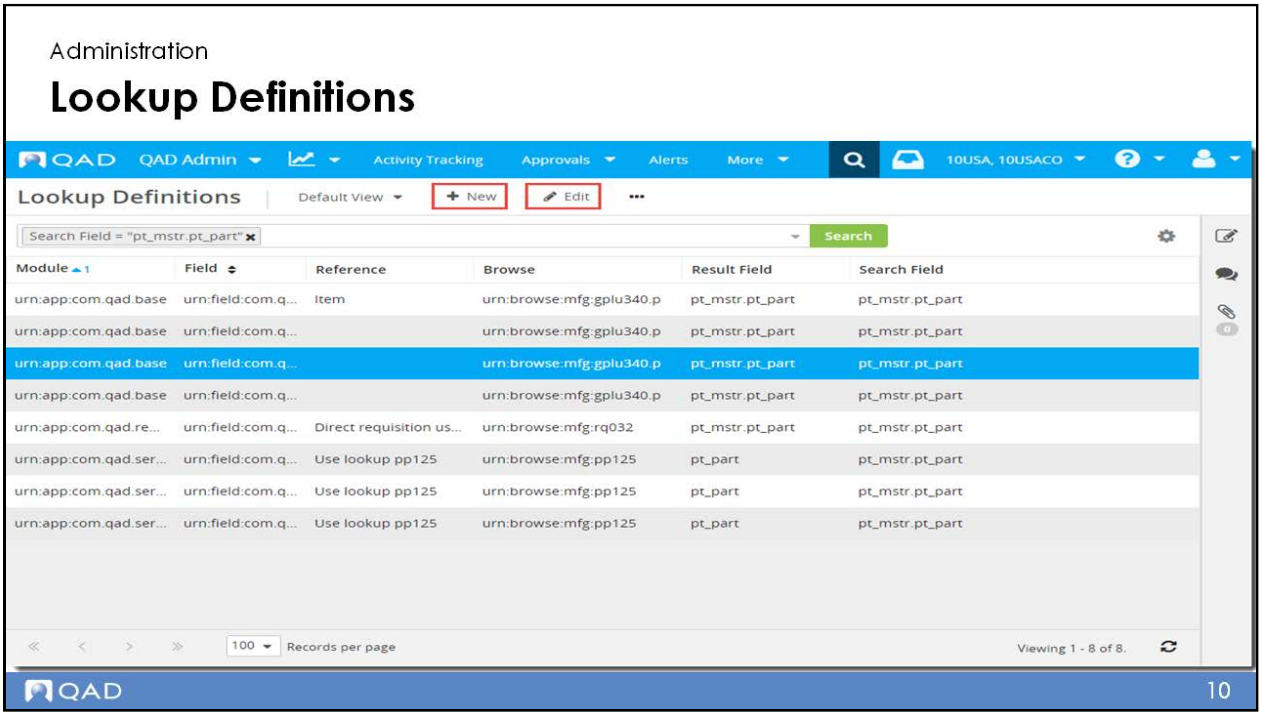
Lookup Definitions



A lookup gives users a way to select a value from a browse instead of having to enter the value manually. On the user interface, a lookup can be included on various input fields, indicated by a magnifying glass icon located on the right side of the field.

For example, in Commodity Codes, you can click the magnifying glass icon of the Item Number field and select an item from the pop-up list.

Lookup Definitions

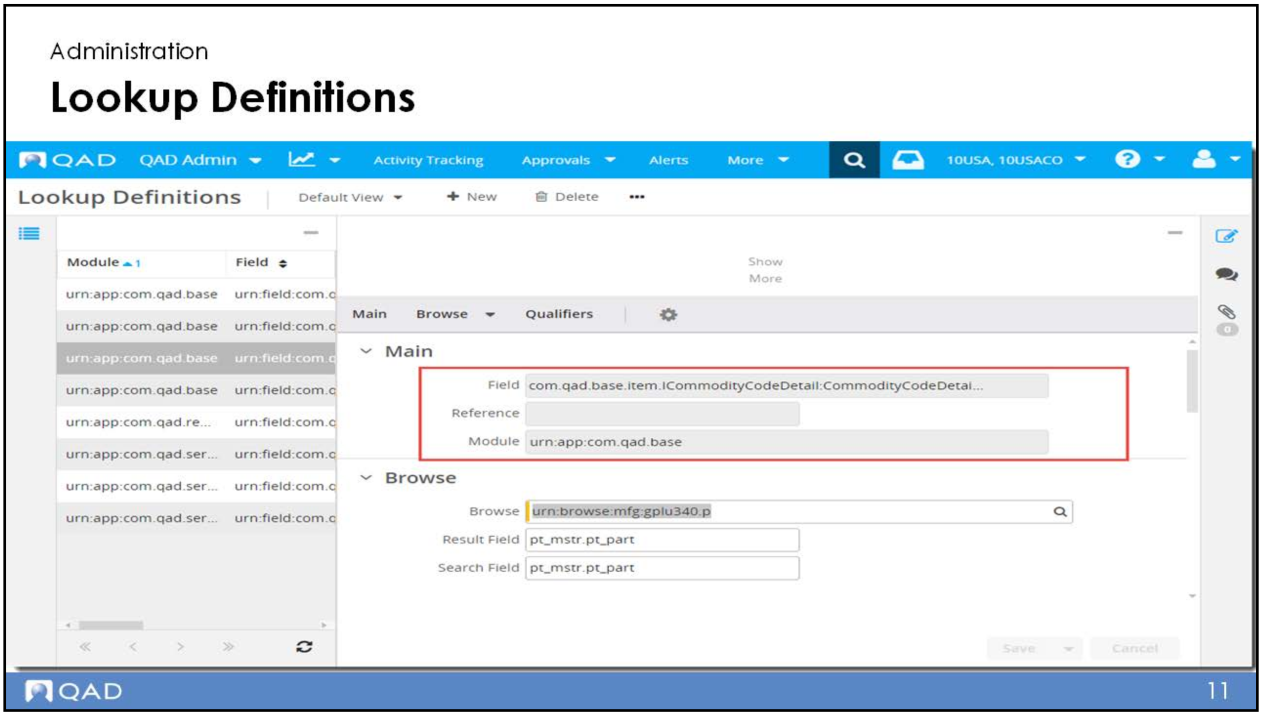


With Lookup Definitions, you can view lookup definitions, create new lookup definitions, and edit lookup definitions.

When you open Lookup Definitions, you first see a listing of the settings for the currently defined lookups, including:

- Module
- Field
- Reference
- Browse
- Result Field
- Search Field

Lookup Definitions



A lookup definition is uniquely identified by Field, Reference, and Module values.

Enter the URI value for a business entity field, a view field, or a browse search field.

A business entity field takes the following format: urn:field:<business entity interface namepace>:<TableName.FieldName

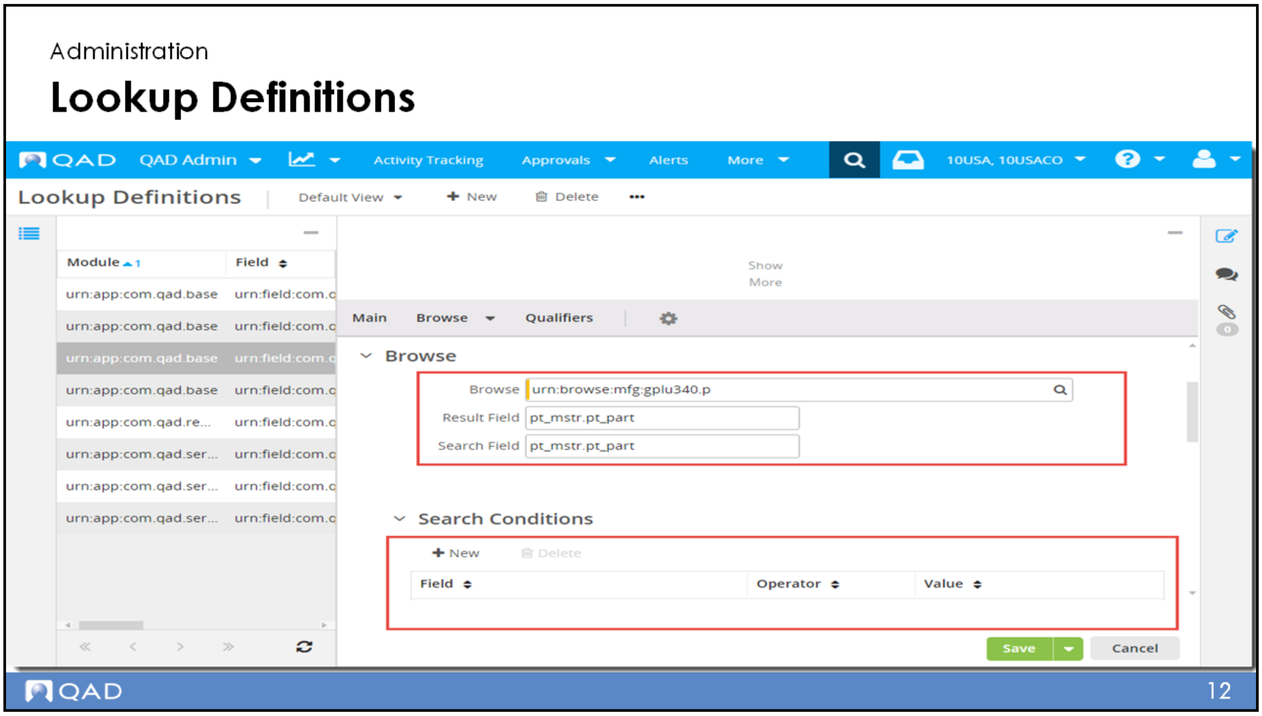
For example, for the Item Code field in the Commodity Code Detail business entity:

urn:field:com.qad.base.item.ICommodityCodeDetail:CommodityCodeDetail.ItemCode

Reference is a free-form text field that can be used to differentiate between multiple lookup definitions for the same field value. For a single lookup definition for a field, this value can be left blank.

Module indicates the URI for the module that owns the lookup definition. For example, the Sales module is: urn:module:com.qad.sales

Lookup Definitions



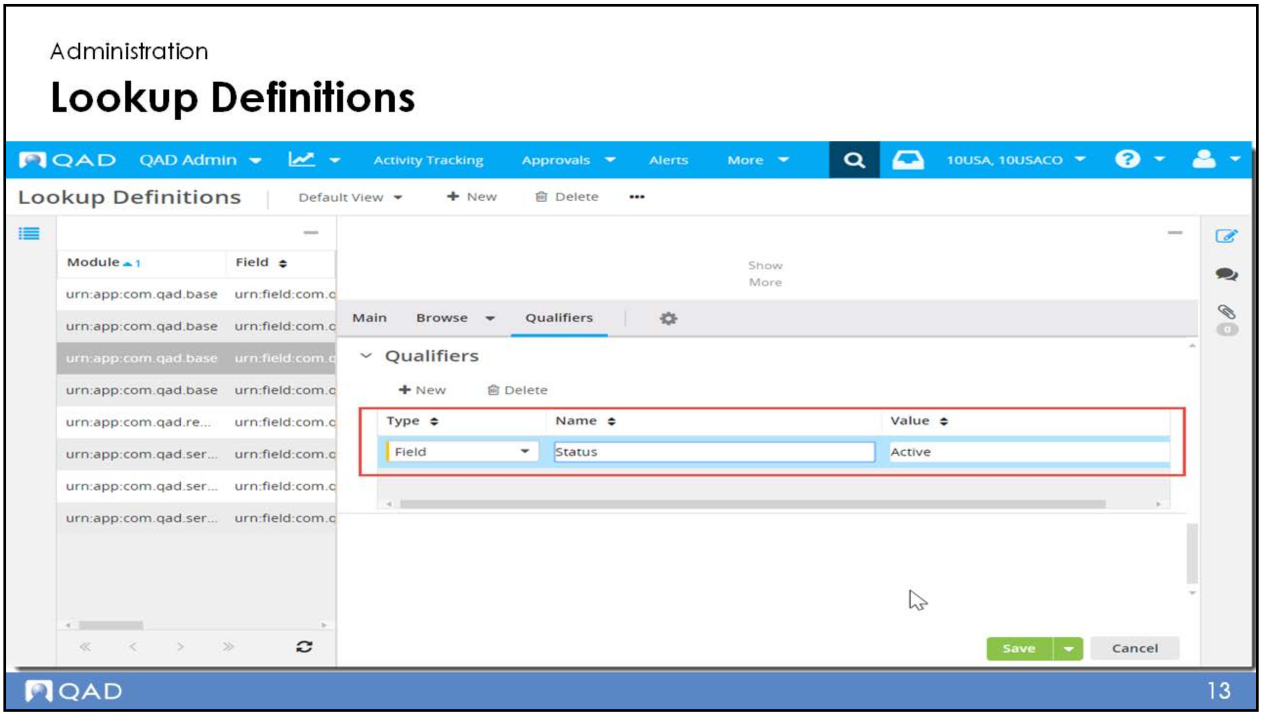
In the Browse field, specify the URI for the browse to be used for the lookup. This is in the format urn:browse:<browse type>:<browse identifier>.

Result Field specifies the field in the browse whose value will be assigned to the field from which the lookup is launched.

If there is a value in the field from which the lookup is launched, a browse search condition will be created for the specified search field and the value.

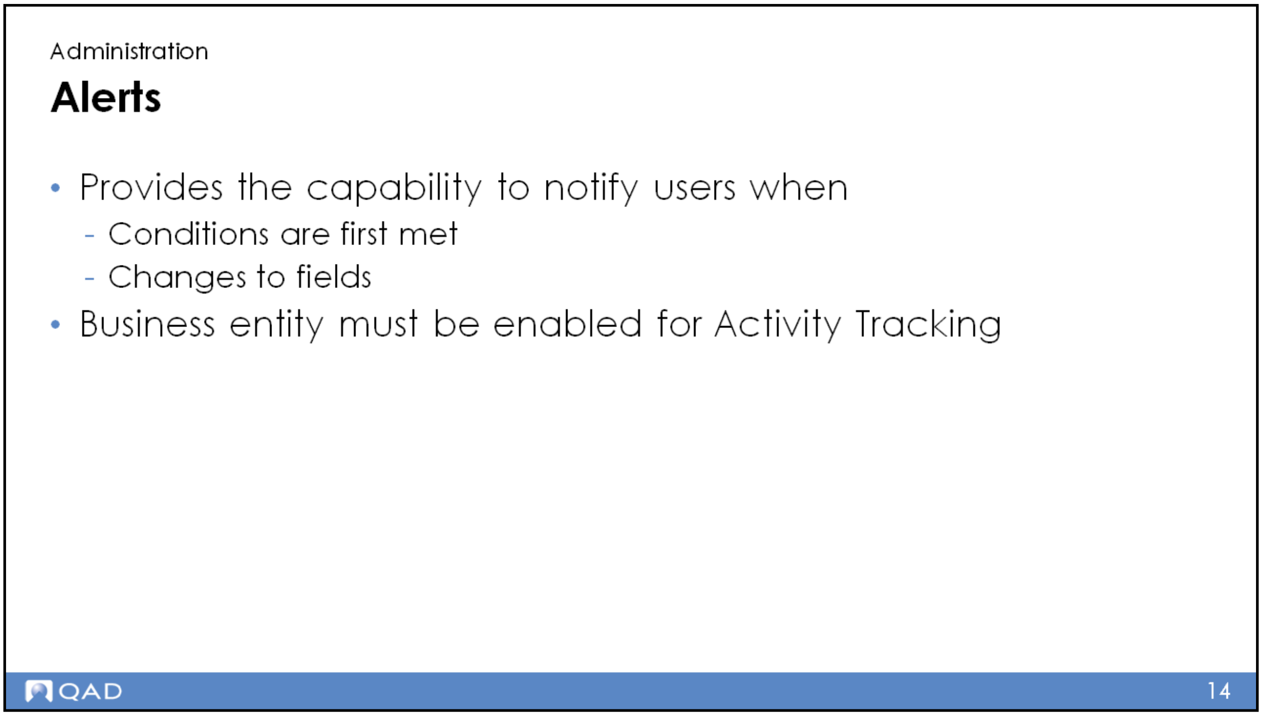
If needed, enter search conditions for the browse.

Lookup Definitions



Use Qualifiers to define conditional lookups. They are used to limit the set of lookups that can be used with a field and to select a particular lookup when multiple lookups are available. Each qualifier has a type, name, and value.

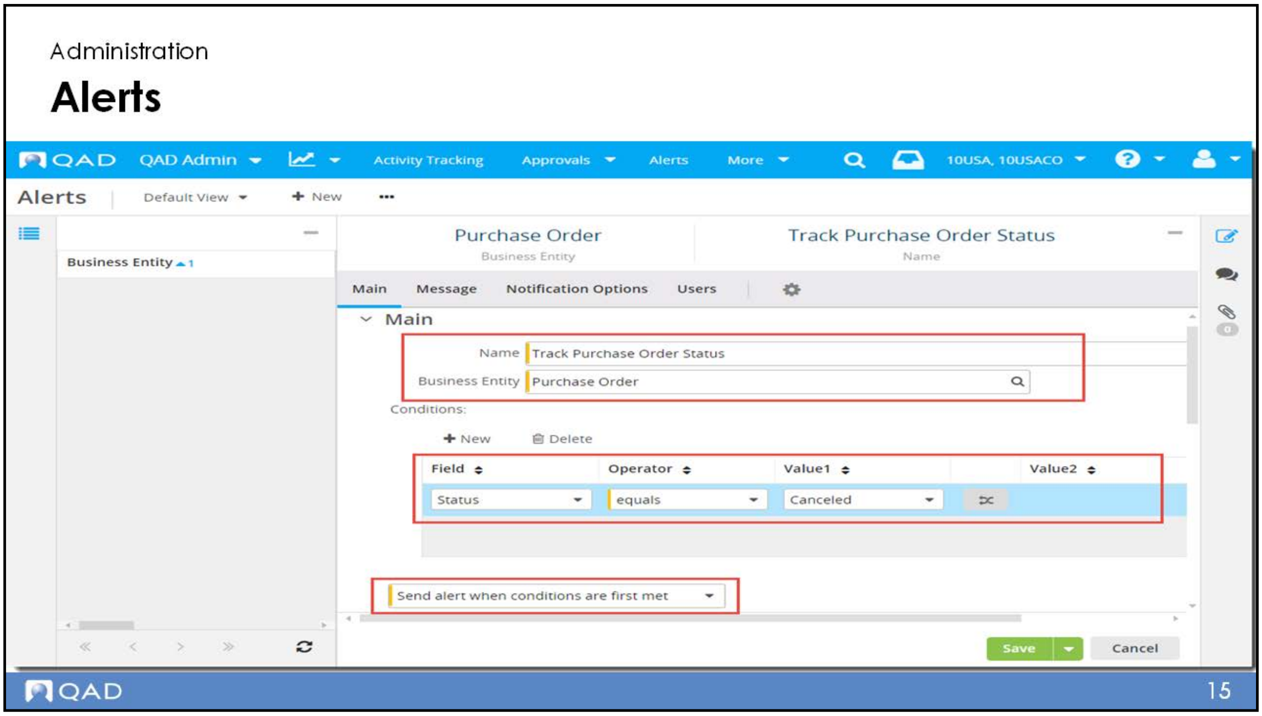
Alerts



The Alerts functionality provides the capability to notify users when certain conditions are satisfied for a business entity. Only administrators can access the Alerts menu to create, modify, or delete alerts, and to add users who subscribe to the alerts.

The Alerts solution is based on data change events. So before you can set up alerts, the business entity must be enabled for Activity Tracking. Also, note that only the changes to database fields can trigger alerts. You cannot use calculated fields for setting conditions.

Alerts



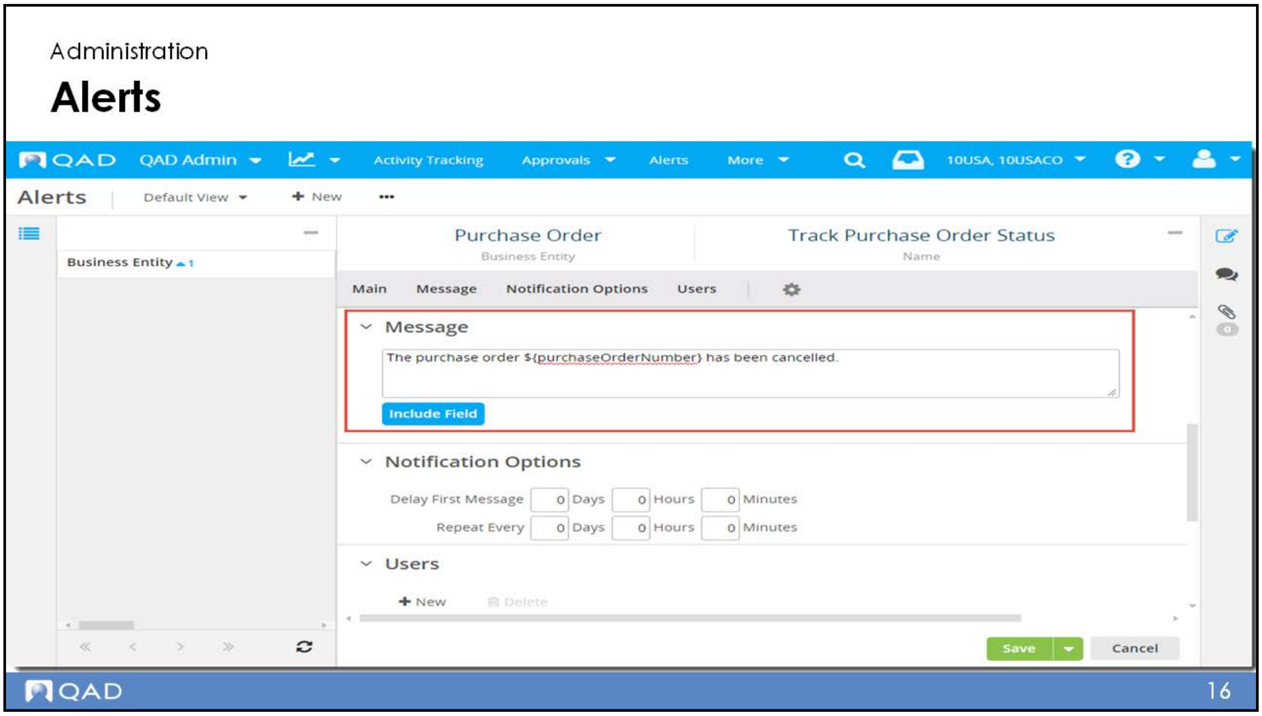
On the Main panel, in the Name field, enter a description of the alert that you want to create. And in the Business Entity field, specify the business entity for which you want to define this alert.

In the Conditions grid, set up the conditions that trigger the alert.

If you want the system to send alerts when changes are made to specific fields, choose the "Send alerts about changes to fields" option under the Conditions grid. When conditions are met, the system sends alerts that notify users of the changes to the tracked fields.

If you want the system to send alerts when the conditions to trigger the alert are met, choose the "Send alert when conditions are first met" option under the Conditions grid.

Alerts

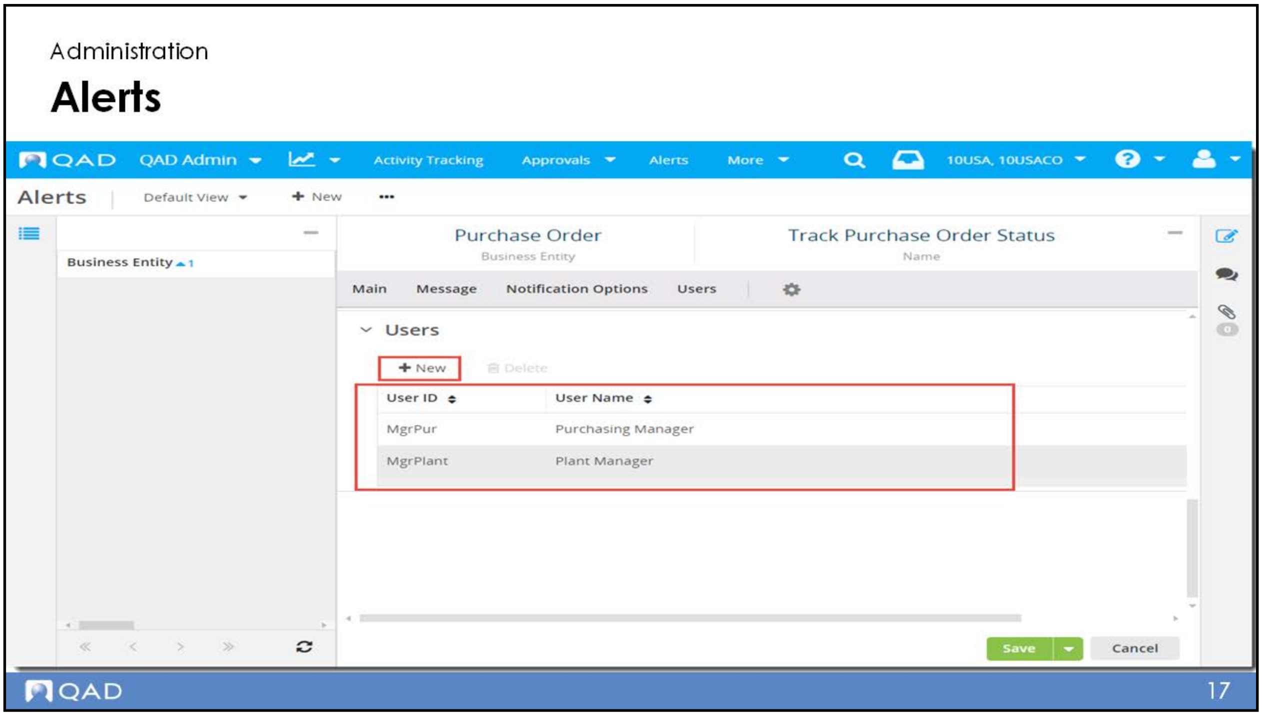


In the Message box, define the alert message. You can click Include Field to include fields in the alert message.

The added fields are automatically added to the end of the text. You can adjust the positions of the added fields manually.

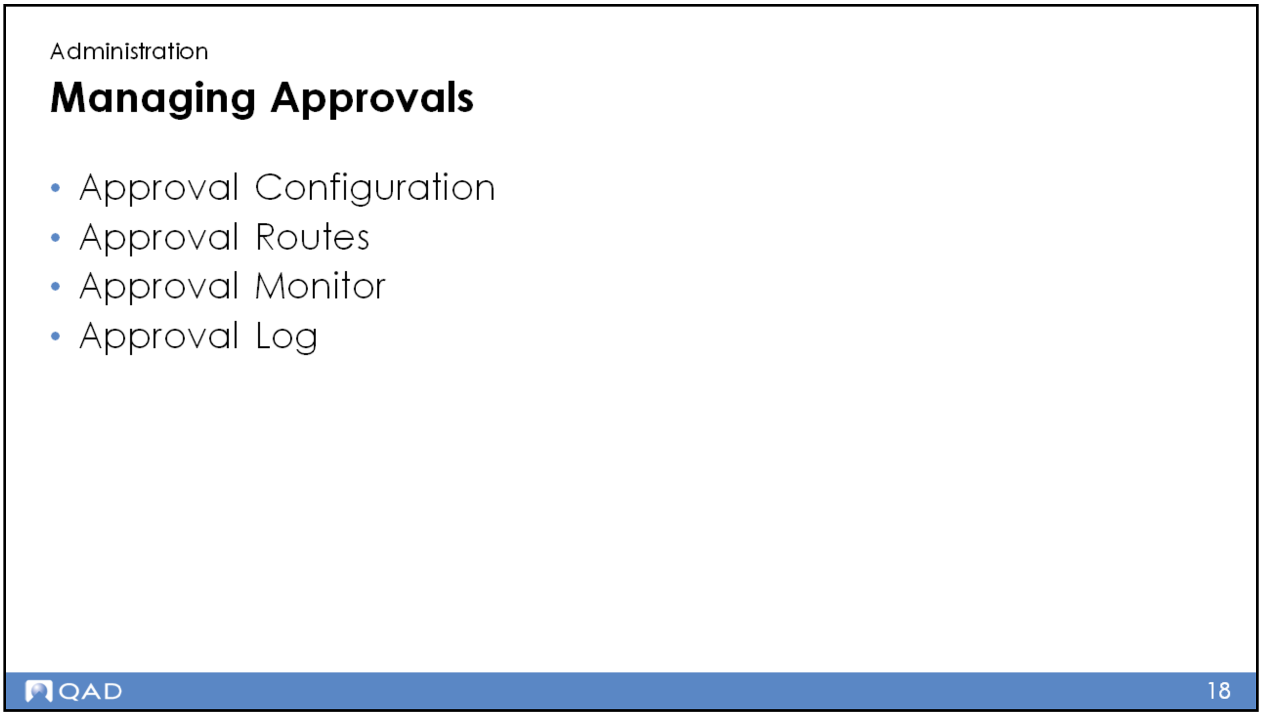
On the Notification Options panel, configure the system to deliver alert messages only when the defined delay time has passed, or to repeat them every specified period of time.

Alerts



On the Users panel, add users to subscribe to the alert.

Managing Approvals



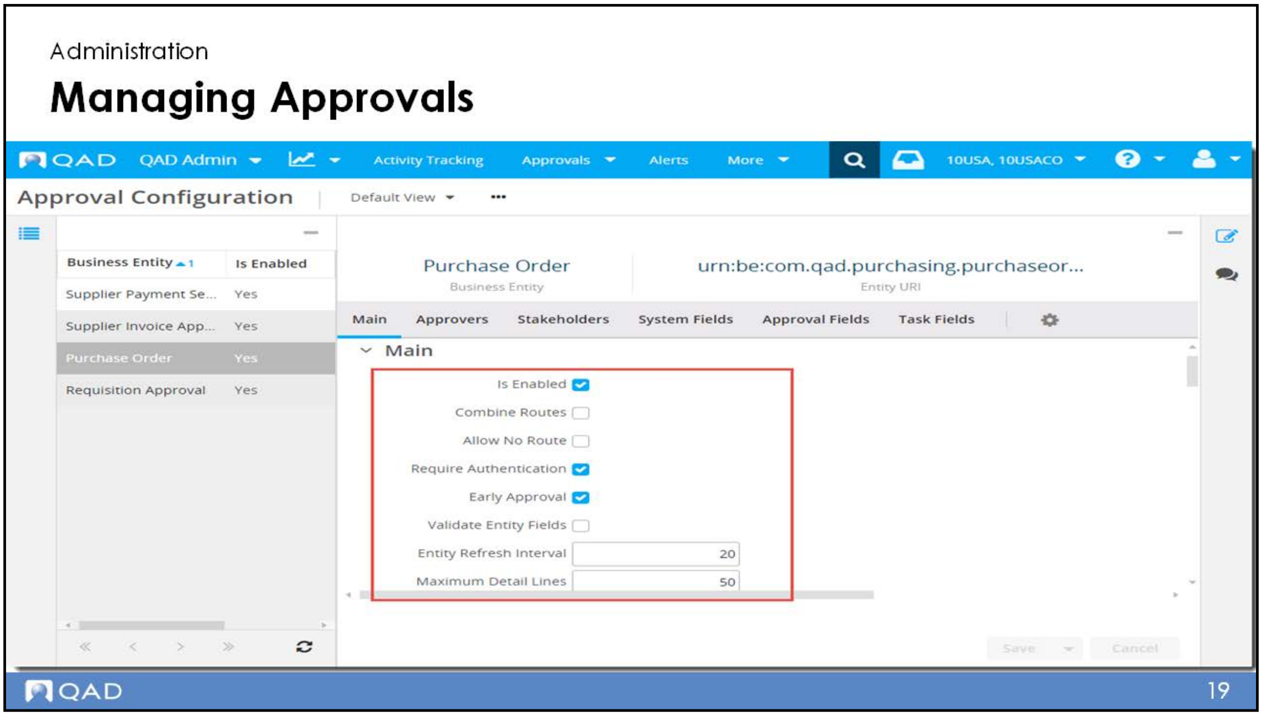
Managing Approvals provides a generic approval capability for the approval of requisitions, purchase orders, supplier invoices, and supplier payment selection.

You can enable or disable the general approvals for the specific functionality. You can configure the approval message format.

You can set up approval routes, including specifying the approval conditions and approvers in sequence.

You can monitor the approval status and review the approval log.

Managing Approvals



The Approval Configuration function allows administrators to view and update configuration meta data of approval processes.

Using Approval Configuration, you can:

•Enable or disable an approval process

•Configure how approvers and stakeholders get email notifications

•View predefined read-only data of an approval process Currently, you can configure six types of approval processes:

•Inventory Status Code Approval

•Item Approval

•Purchase Order Approval

•Requisition Approval

•Supplier Invoice Approval

•Supplier Payment Selection Approval

If you set Combine Routes field to Yes, when an approval request meets the conditions of multiple routes, the system combines these routes. All approvers from those routes are required to approve this approval request. If an approver is set for multiple routes, this approver only needs to approve once. Early Approval is not available when Combine Route is set to Yes. If No, the system chooses the first route that matches the request.

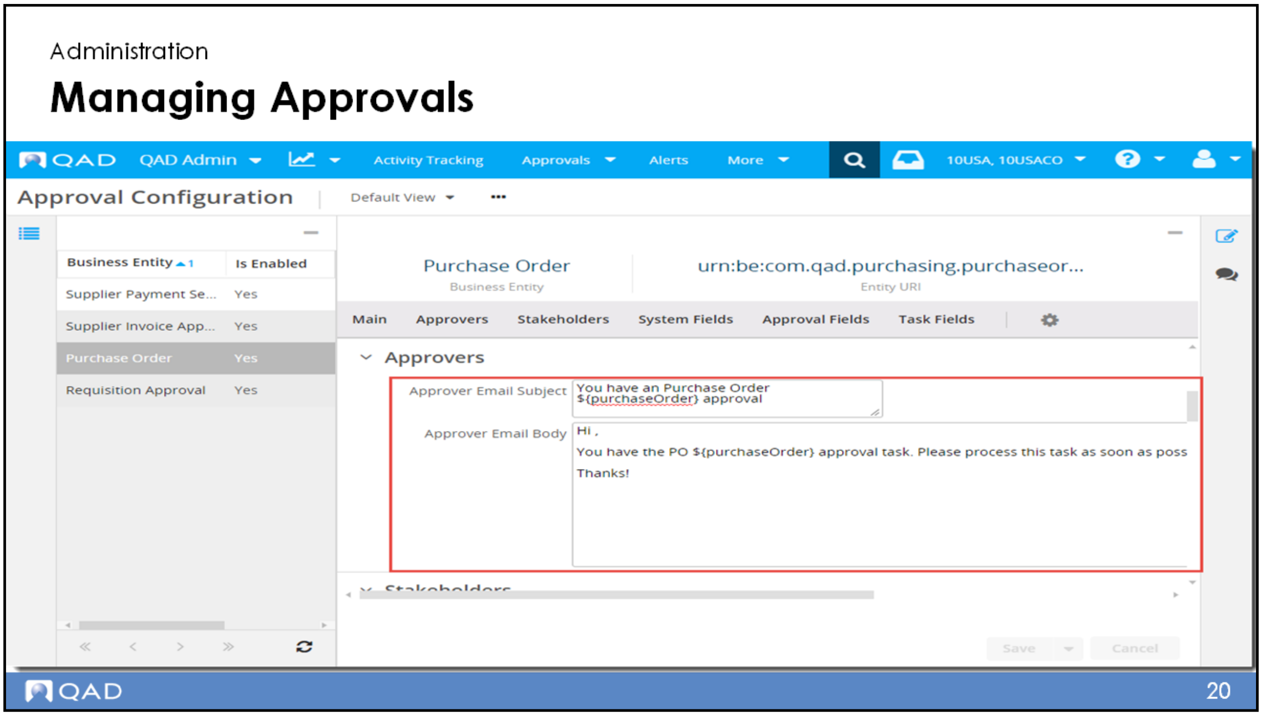
If you set Allow No Route field to Yes, when there is no route that matches the request, the system automatically approves the approval request. If you set this field to No, when there is no route that matches the request, the system marks the approval process with the Error status.

If the Require Authentication field is set to Yes, approvers are required to provide credentials when clicking an action in the approval screen. If No, no authentication is required when choosing an action.

This field is not available when Combine Routes is set to Yes.

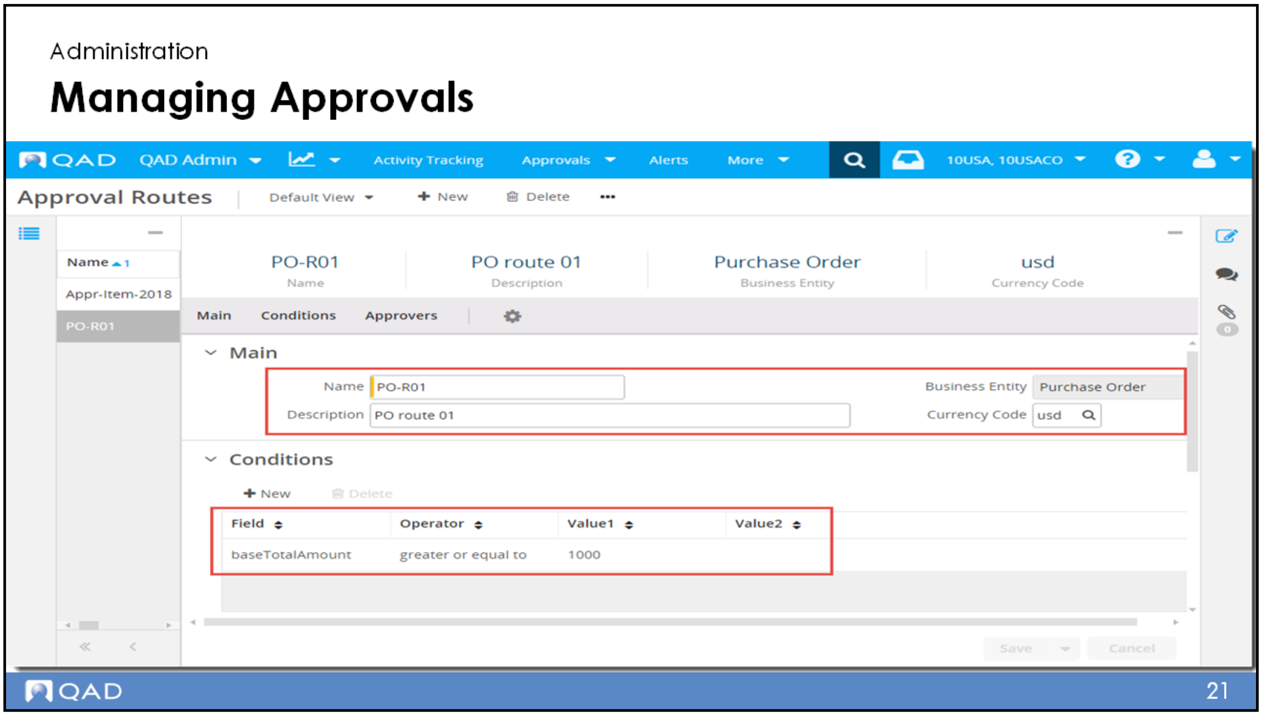
If the Early Approval field is set to Yes, early approvals are allowed in the entity. You can skip approvers before you in the sequence to take action on an approval request using Future Approvals. If No, early approvals are not allowed in the entity.

Managing Approvals



Enter the subject and body of the notification email that is sent to an approver. You can include key fields as tokens. You can find some of the key fields from the Approval Fields and Task Fields panels.

Managing Approvals



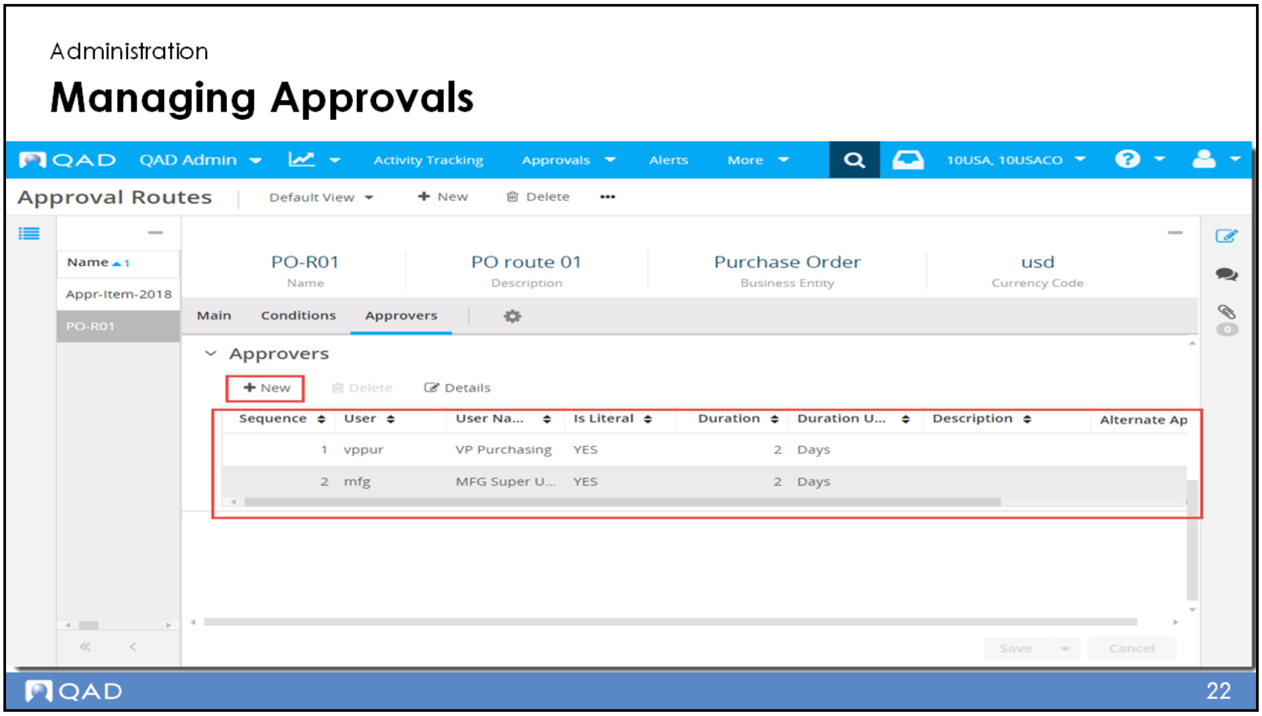
Use Approval Routes to configure routes for an approval process. You can configure the chain of approvers who need to approve a request, based on the approval request data.

When you create a route, on the Main panel, enter the name, business entity, description of the route, and currency code.

The Currency Code determines the currency of the amounts in both route conditions and approver conditions. When the currency of the value in the business entity is different from the currency specified in the route, the system first converts the values of the entity before evaluating the conditions.

After an approval request is submitted, the system first determines the route to use based on the route conditions set up on the Conditions panel. Then the system determines the specific approver based on the approver conditions set up on the Approvers panel.

Managing Approvals



On the Approvers panel, you define the approvers in the current route. For each approver, you define the user, its sequence, duration, and other data.

The rules for combining approver conditions are the following:

•Conditions with different Conditions Fields are joined with AND operation.

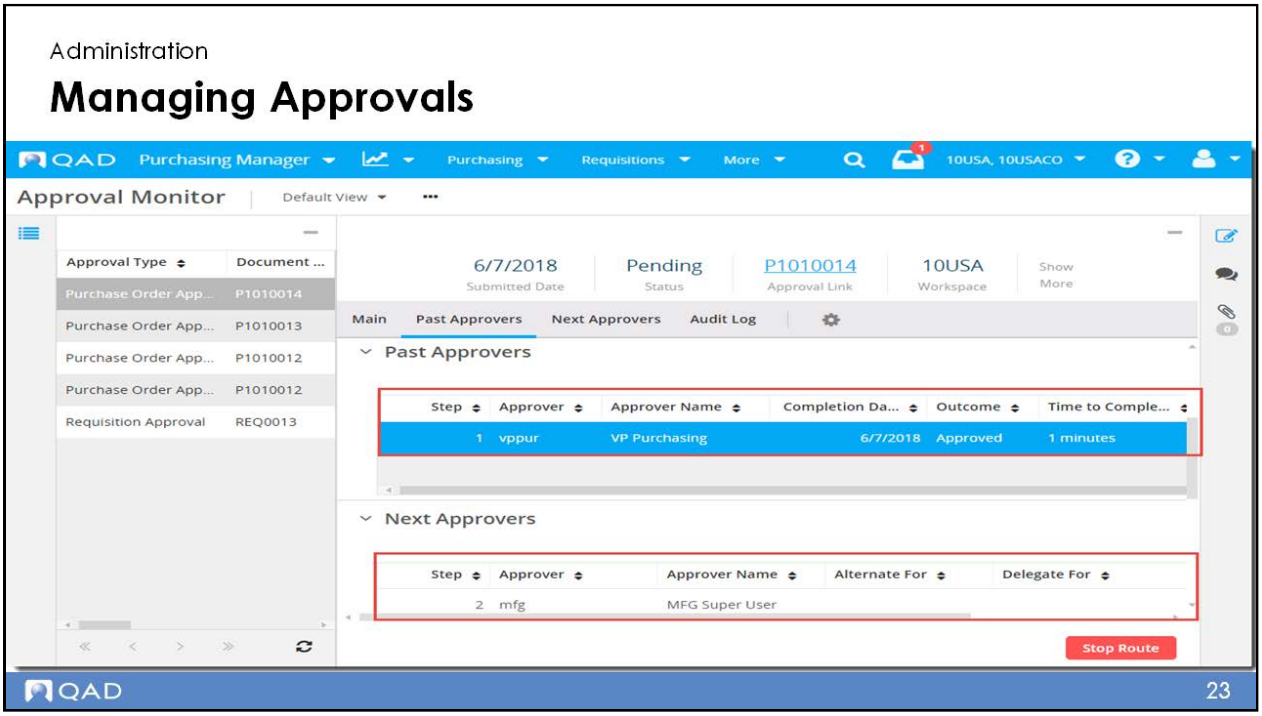
•Conditions with the same Conditions Fields are joined with OR operation

•Conditions of a second-level table field are iteratively evaluated on the second-level table record collection. If one record satisfies the condition, then the system returns true. If there is no second-level table record, or none of the records satisfy the condition, then the system returns false.

You can use aggregate calculation in setting up approver conditions. Define the field for which you want to calculate an aggregate amount, and set Aggregate to Yes. Then set up the condition based on the aggregate amount of this specified field.

The Aggregate field can only be set to Yes when the value is integer or decimal.

Managing Approvals



With Approval Monitor, administrators can do the following:

•View all open approvals, including the ones with errors

•Stop an approval process by using the Stop Route button

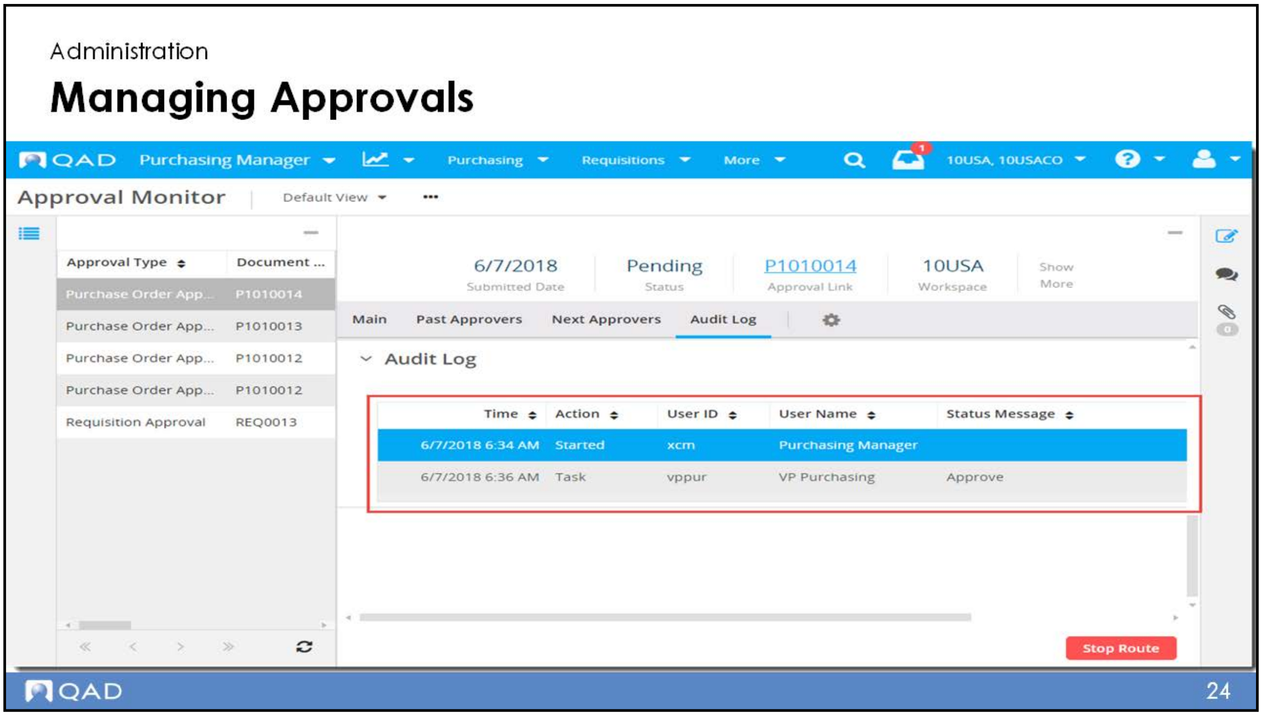
•Resume an approval process with an error after fixing the error

The Main panel displays the basic information of the approval request. Besides the information displayed on the top of the Approval Monitor Form, it also includes approval type and description.

The Past Approvers panel: Displays the approvers that have taken action to the approval request with their usernames, names, completion dates, comments, and other details. If an approver is an alternate approver, the system displays the main approver in the Alternate For column. If an approver is a delegated approver, the system displays in the Delegate For column the original approver, who delegates the approval task to this approver.

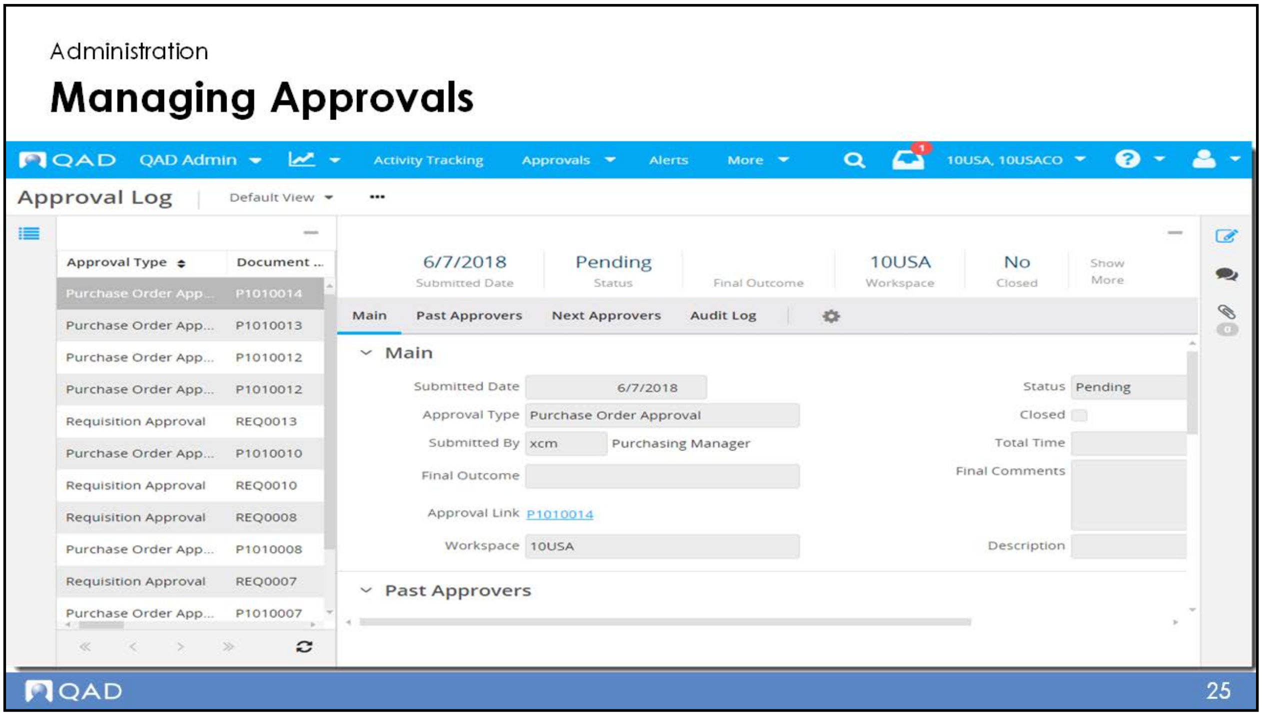
The Next Approvers panel: Displays in sequence the approvers to whom the approval request will route, with their usernames and names. If an approver is an alternate approver, the system displays the main approver in the Alternate For column. If an approver is a delegated approver, the system displays in the Delegate For column the original approver, who delegates the approval task to this approver.

Managing Approvals



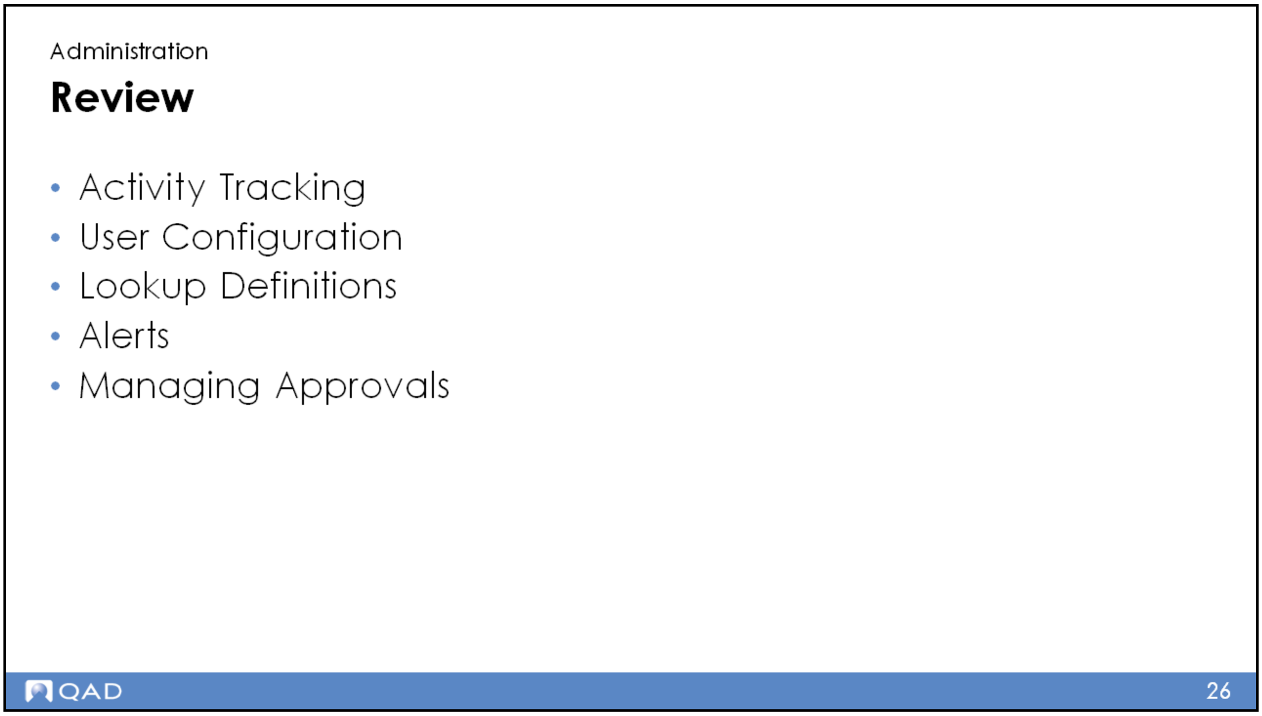
The Audit Log show the approval process journal. The administrator can review the approval status from this panel.

Managing Approvals



Approval Log gives a browse to show all approval processes, including closed ones.

Review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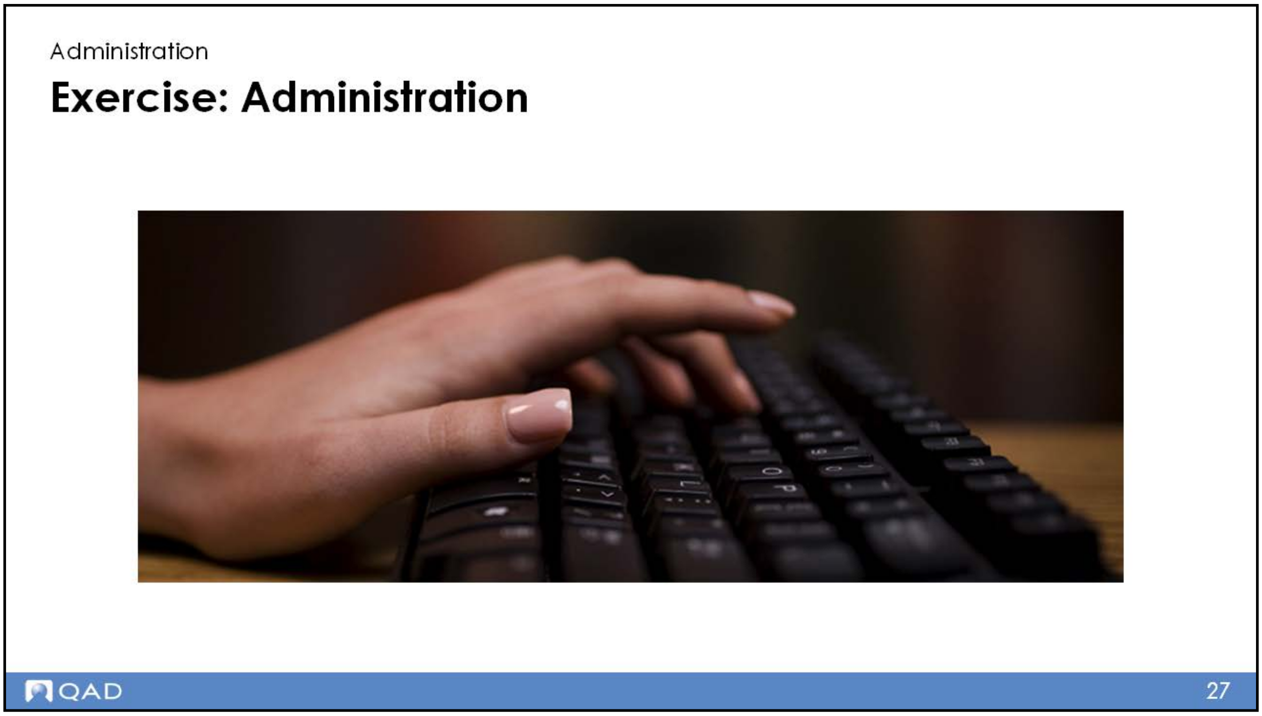
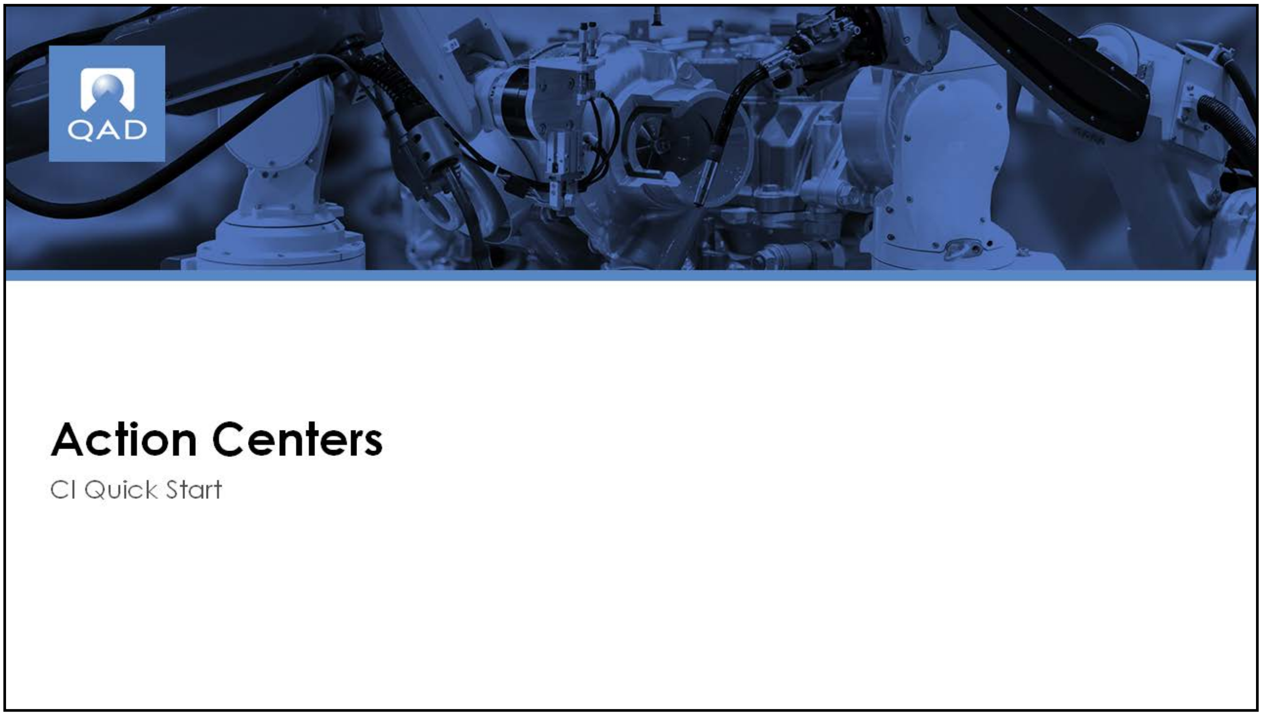


CHAPTER 8

Action Centers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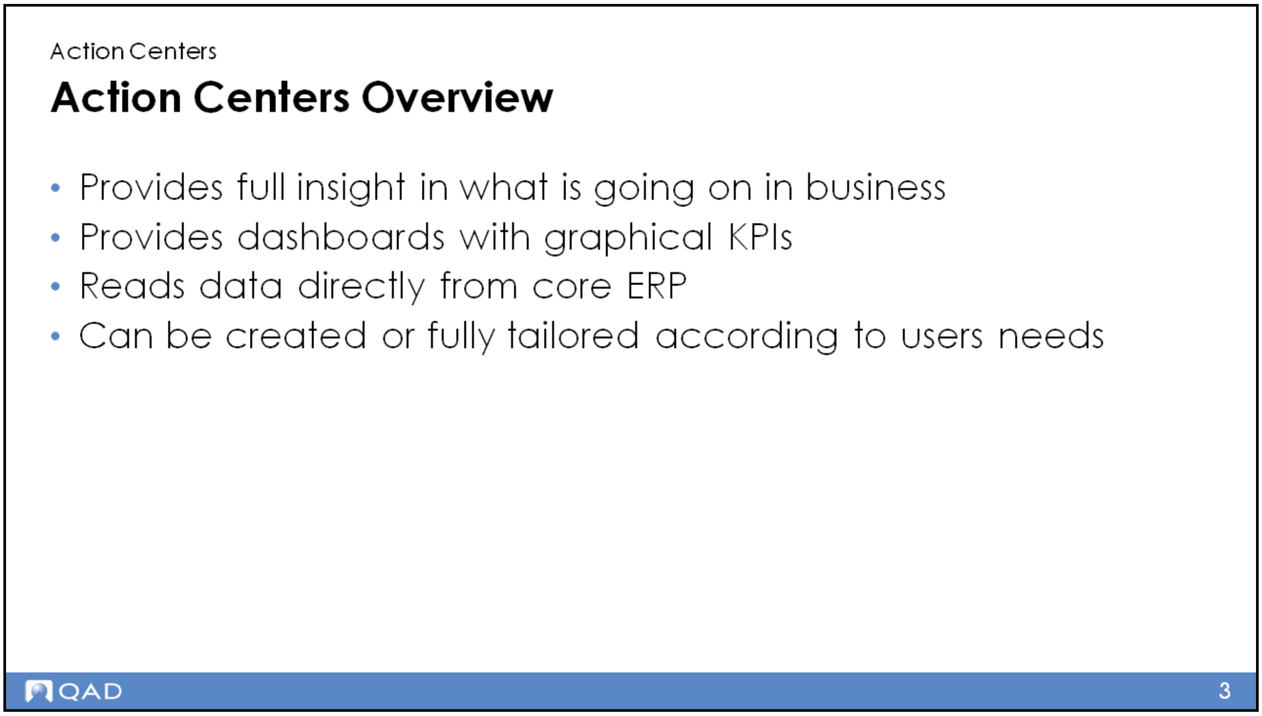
Action Centers

Overview

- Action Centers Overview
- KPIs
- Visuals
- Developing Action Centers

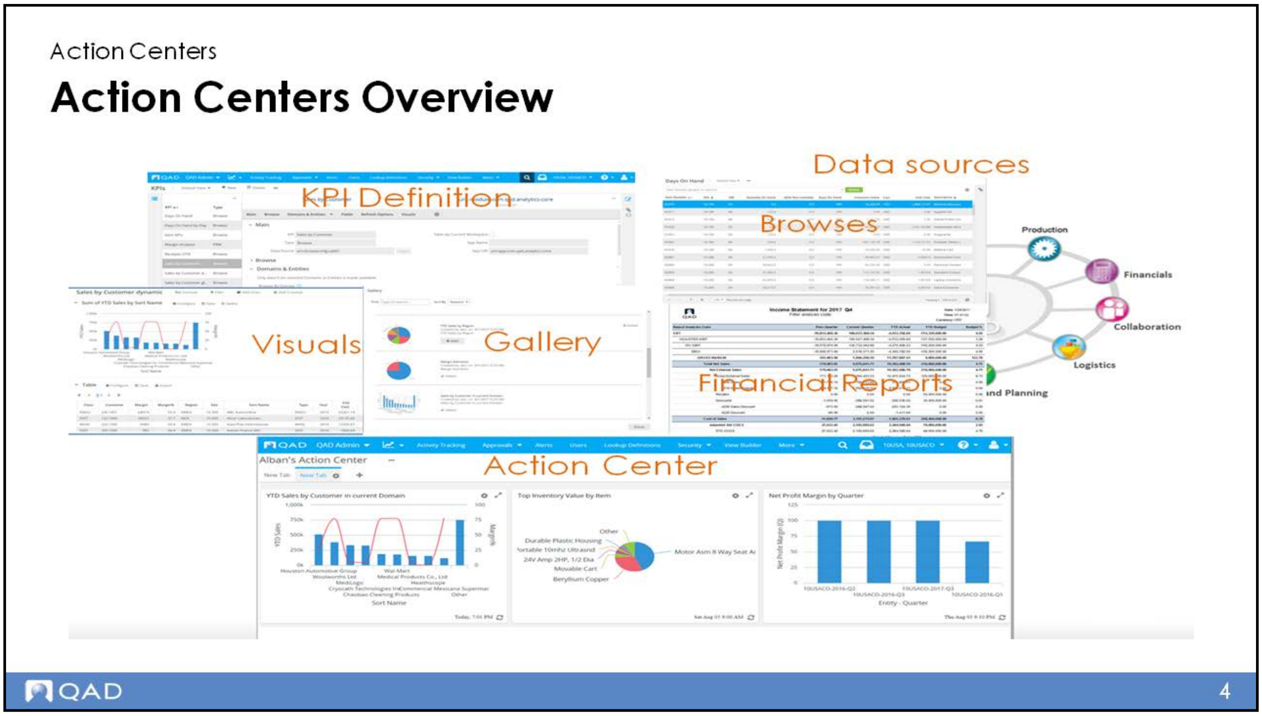
QAD 2

Action Centers Overview



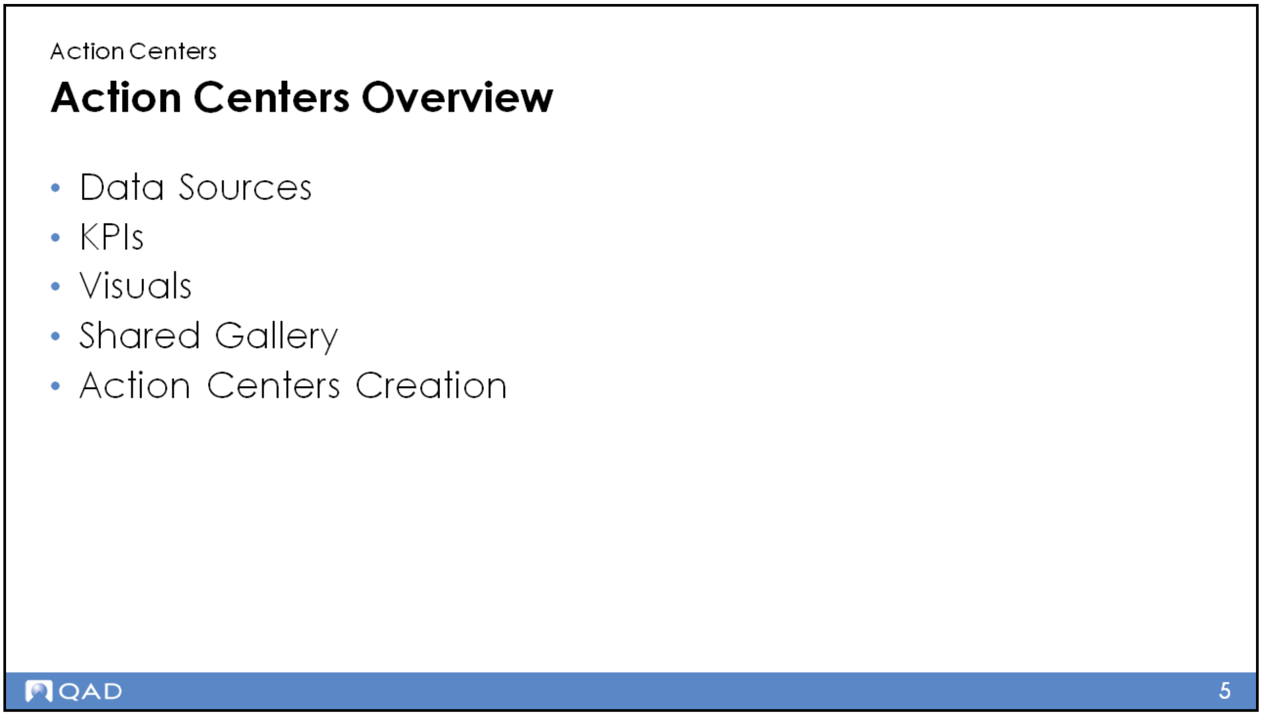
Action Centers provide managers with insights into their business in a visual format. They offer next-generation analytics, which allow managers to monitor KPIs that provide insights into particular areas of responsibility.

Action Centers Overview



The QAD ERP browses and Financial reports can be used as a data source to build powerful KPIs with attractive Visuals that are stored in a shared Gallery. Users can build their own Action Centers by selecting KPIs from the Gallery and tailoring their Action Center to show all the KPIs they want to track and analyze.

Action Centers Overview



The QAD ERP suite consists of Apps for many functional areas like Inventory, Purchasing, Production, Sales, Financials, and so on. Each of those Apps stores its data in a central database that can be queried with browses. There exist many standard QAD browses, and customers can also build their own custom browse queries. In the Action Centers, any browse in the system becomes available as a data source for building KPIs.

For Financial data, most companies already use financial statements like balance sheet, income statement and cash flow statement that they built with the Financial Report Writer. Data from these reports can also be used as a data source for the KPIs of the Action Centers.

New KPIs can be created at will with a KPI maintenance screen. In the screen you can select a data source from the list of browses or from the list of Financial Report Writer data sources.

You can specify the selection criteria to apply when retrieving the data. This happens in the same way as setting Search criteria when running a browse query. You can also specify the domains and entities to read data from. And you select the fields that will be used as dimensions and facts for the KPI calculation and visualization. Once the KPI is defined, you can start creating Visuals.

Visuals are graphical representations of the data in chart or table form. You can choose the chart type, define the dimensions used for the chart, define aggregation types, make calculations with formulas, apply additional filtering, and even create cross-tables.

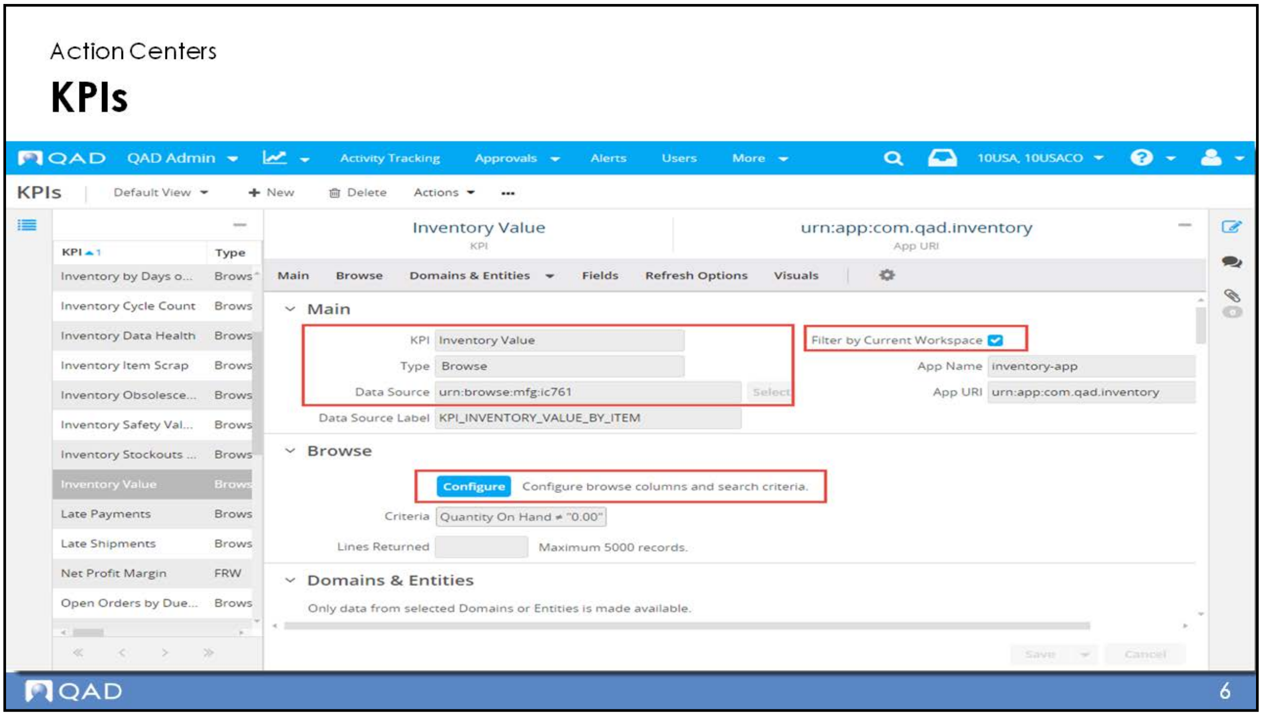
With the same KPI definition you can create many different visuals. All the visuals that you create are stored in a shared Gallery.

The Visuals in the Gallery are then used to build Action Centers. That brings us to the most prominent component of the solution: the Action Center itself.

Users can create personal Action Centers or administrators can create shared Action Centers and share those with users based on their role.

Starting from an empty dashboard that you just created, you can open the Gallery, select Visuals from it, and add those to your Action Center dashboard. On the resulting Action Center dashboard you can rearrange the visuals. It is all saved automatically so you can come back at any time later to add more KPIs or to modify or to replace existing KPIs on your dashboard. This Action Center dashboard is also the starting point for further analysis of the KPIs.

KPIs



A KPI is a metric that provides important information to a manager monitoring a particular area of the business; for example, a chief financial officer monitors the Net Profit Margin KPI. Each Action Center KPI is based on either an operational or financial browse. You can use the KPI definition to further refine the data—and build on it—before creating KPI visuals for inclusion in an Action Center.

When you create a KPI definition, you can specify the selection criteria to apply when retrieving the data from the core ERP system. The process is similar to specifying search criteria when running a browse query. You can also specify the domains or entities to read data from, and select the fields that will be used as dimensions and facts—KPI elements—for the KPI calculation and visualization.

The KPIs view is available to users with the QAD Admin role. To open the KPIs view, search for the KPIs option in the More menu on the Menu Bar or type KPIs in the Menu Search.

Enter a unique name for the KPI.

Select a type of the KPI. To create a KPI based on an operational browse or a financial browse, select Browse. To create a KPI based on an FRW KPI, select Financial Report Writer. Depending on the value that you select for this field, the Browse panel or FRW panel opens in the KPI form.

Data Source is the source browse or FRW KPI on which the Action Center KPI is based. When selecting a browse data source, a list of all of the browses that exist in the ERP system and are available in the Channel Islands UI is displayed.

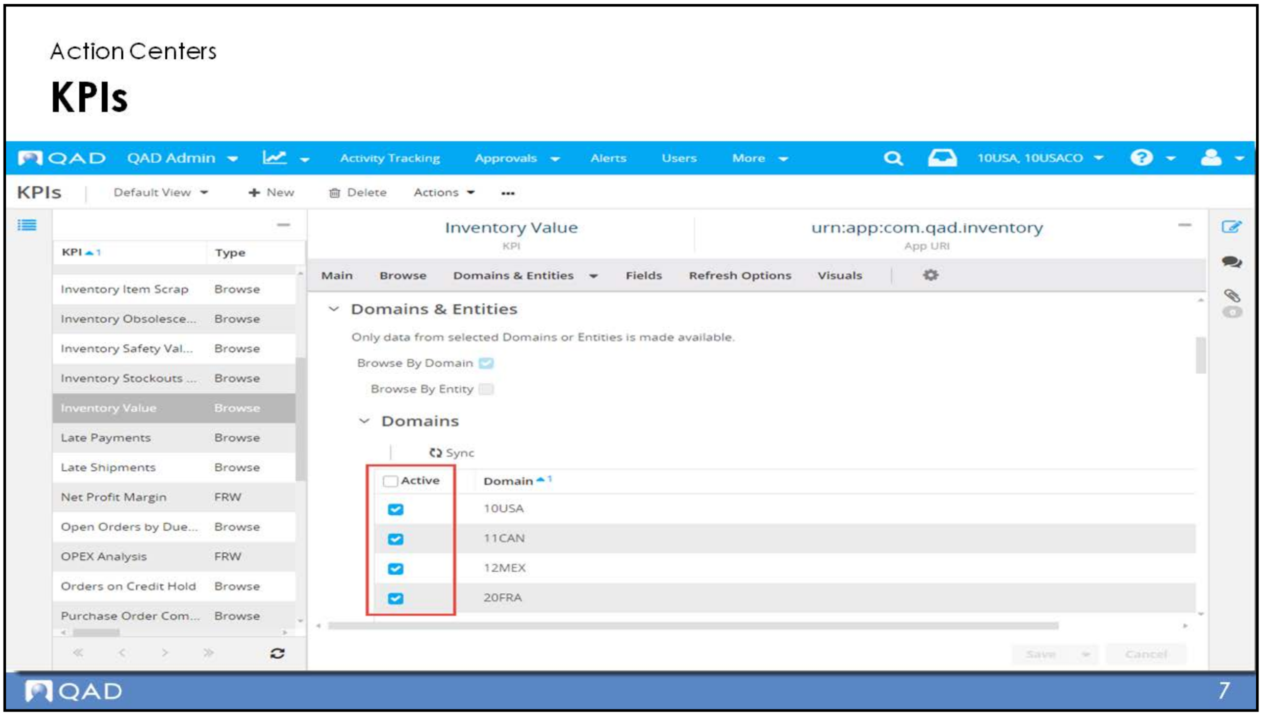
When the Filter by Current Workspace field is selected, the scope of the KPI is restricted to the current domain or entity.

The Browse panel opens when the Type field in the Main panel is set to Browse. The panel contains information that is only relevant when the KPI is based on an operational or financial browse. It allows you to control the browse results on which the KPI dataset is based.

The Configure button allows you to run the browse and refine the browse results using selection criteria. You can change the selection criteria at any time.

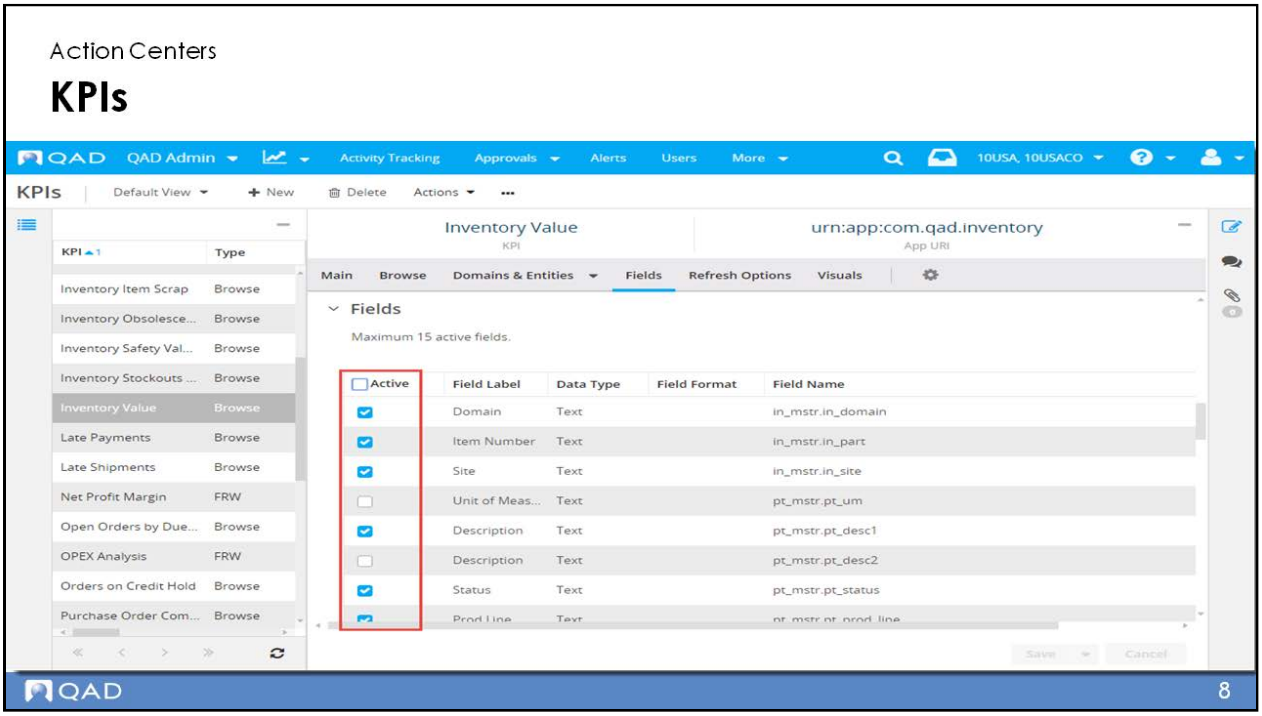
The Financial Report Writer panel opens when the Type field in the Main panel is set to Financial Report Writer; it contains information that is only relevant when the KPI is based on an FRW KPI. You can specify the number of periods to take into account, and you can refresh the Fields and Entities lists based on the FRW report cube.

KPIs



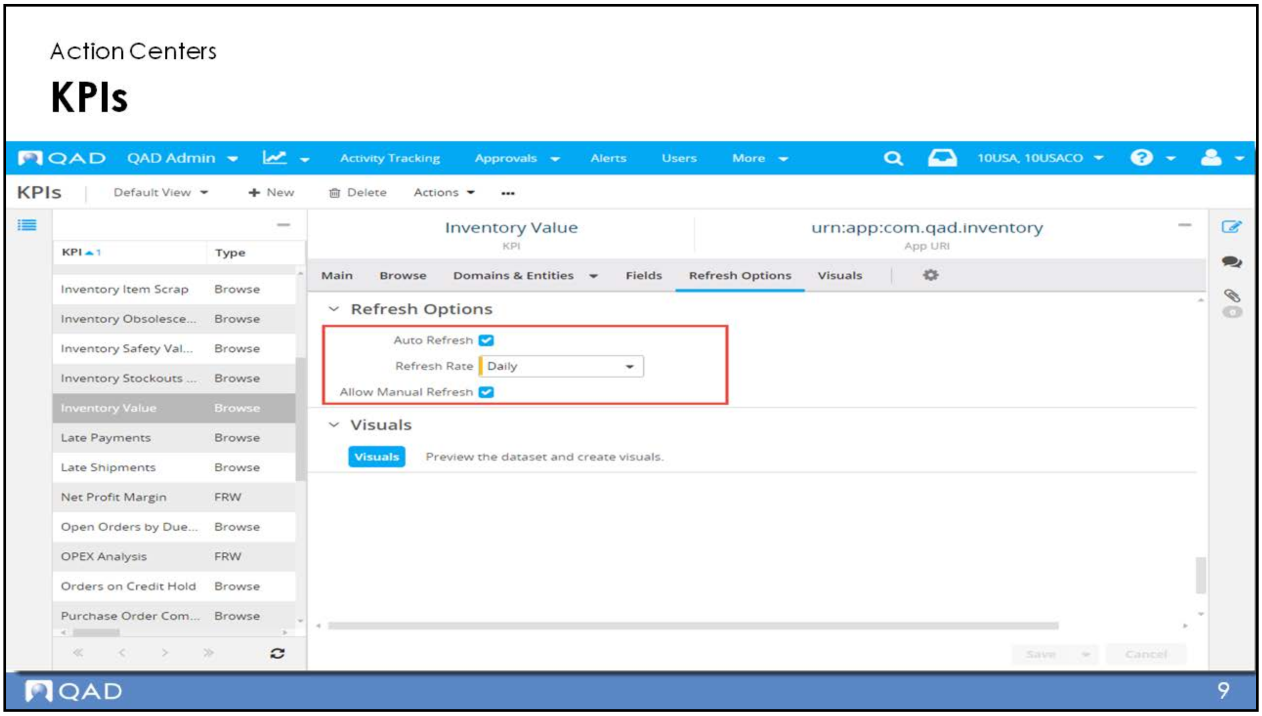
The Domains and Entities panel displays the domains or entities included in the KPI scope.

KPIs



The Fields panel displays the fields from the selected data source. Select the Active field for each field that you want to include in the result dataset for KPI analysis. You can select up to 20 fields, which should be sufficient to create a meaningful KPI.

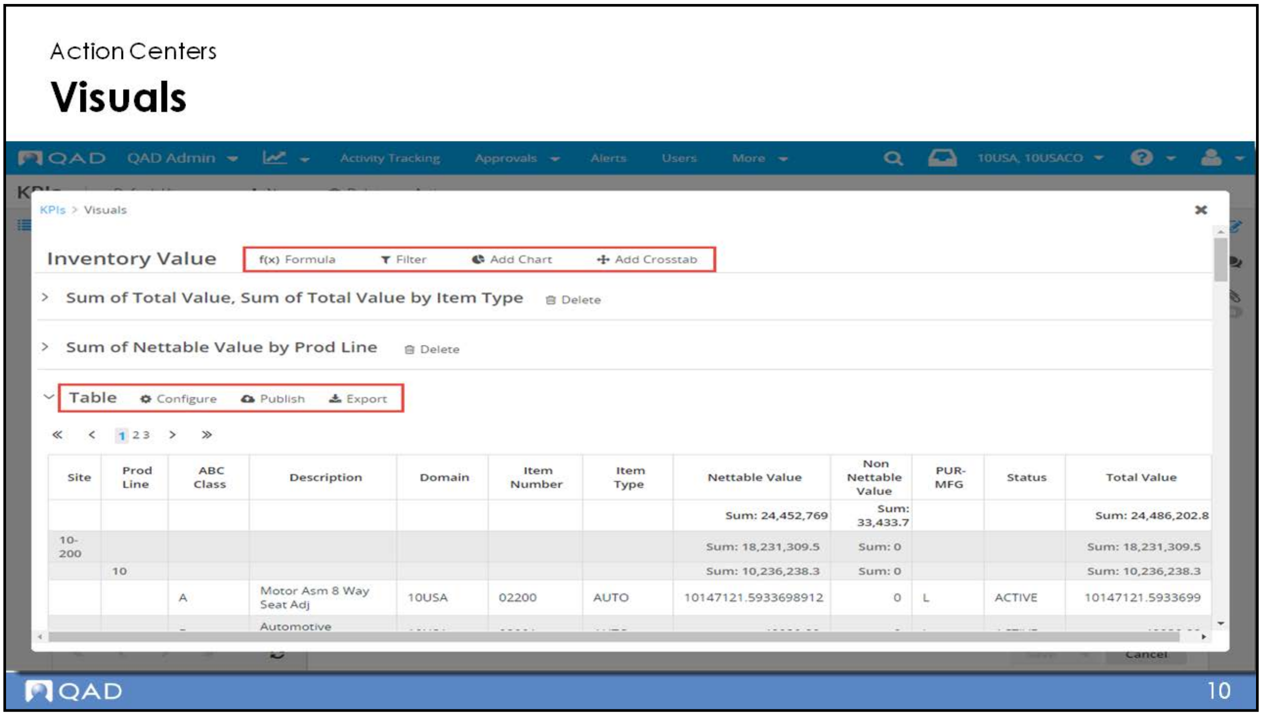
KPIs



The Refresh Options panel allows you to specify how often and by what method the KPI is refreshed with data.

The Visuals panel allows you to generate a chart based on the KPI definition. It is only accessible after you save the settings in the other panels by clicking Save.

Visuals



A visual is a chart based on a KPI definition. You can publish a visual to the gallery for inclusion in Action Centers.

Visuals are graphical representations of KPI data in chart or table form. You can choose the chart type, define the dimensions used for the chart, define aggregation types, make calculations with formulas, and apply additional filtering. You can also create cross-tables. You can create many different visuals from a single KPI definition and save these visuals in the KPI definition before publishing the visuals to the public gallery. After you publish the visuals to the gallery, you can include them in Action Centers.

The Visuals modal window, accessible from the Visuals button in the KPIs form for a saved KPI definition, allows you to review the data generated by a KPI. Based on the KPI definition, you can create additional data and visuals.

The Table panel contains a table visual displaying the data generated from the KPI configuration.

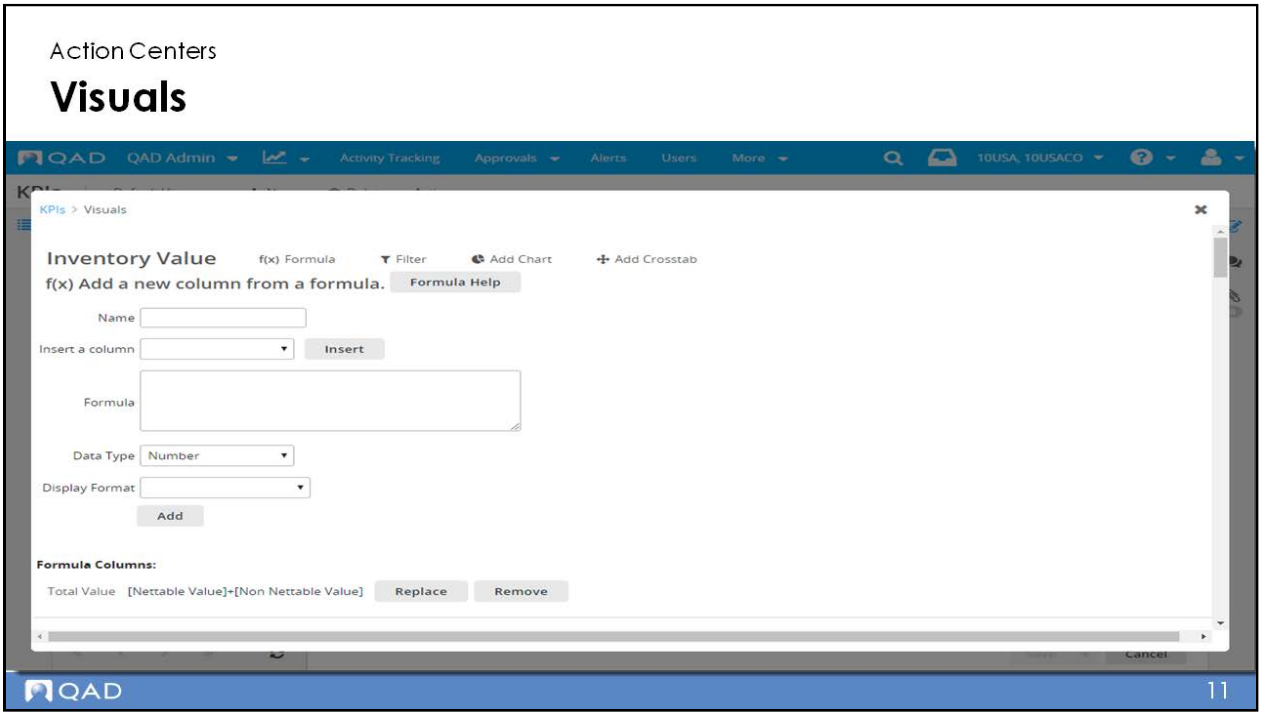
The Visuals toolbar allows you to add a formula to the table visual, filter the data in the table visual, and add a chart or cross-table visual.

Visual options appear in the Table, Chart, and Crosstab panels, and allow you to perform certain actions on the visual. Depending on the type of visual and your permissions, you may be able to configure, publish, export, or delete the visual.

After you have configured the settings in the Visuals modal window, you can save these settings by clicking Save. A Reset button is also available. The Reset button removes all of the settings in the visuals screen and saves this change.

The Reset button allows you to clear all filters, formulas, table settings, charts, and cross-tables in the Visuals modal window, so that you can start again with the data in the table, which is based on the KPI definition settings in the KPIs view. To avoid accidental resets, a warning is displayed when you click Reset.

Visuals



The Formula area allows you to add a column to the table visual. The contents of each cell in this table column is the result of the formula calculation.

For example, you can use formulas to:

•Create custom time buckets for reporting purposes.

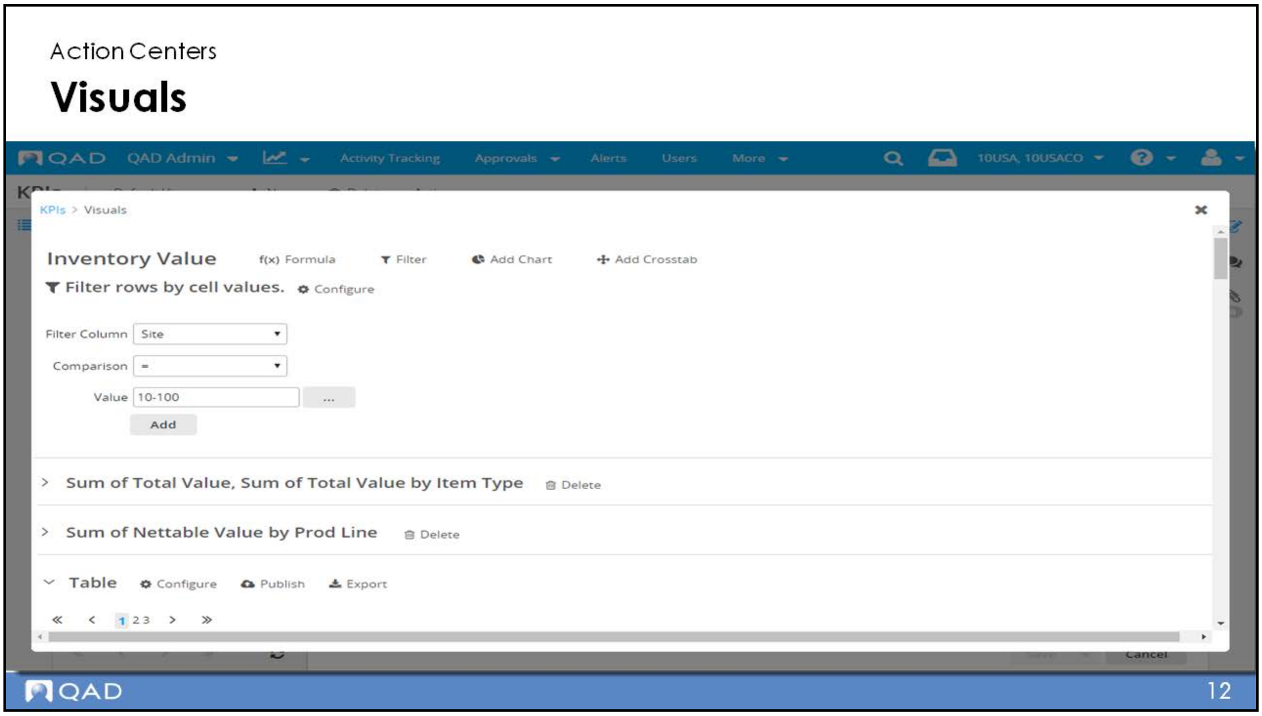
•Compare dates to identify overdue orders or payments.

•Round numbers.

•Convert data from one type to another; this feature is useful because some chart columns can only accept data of a particular type.

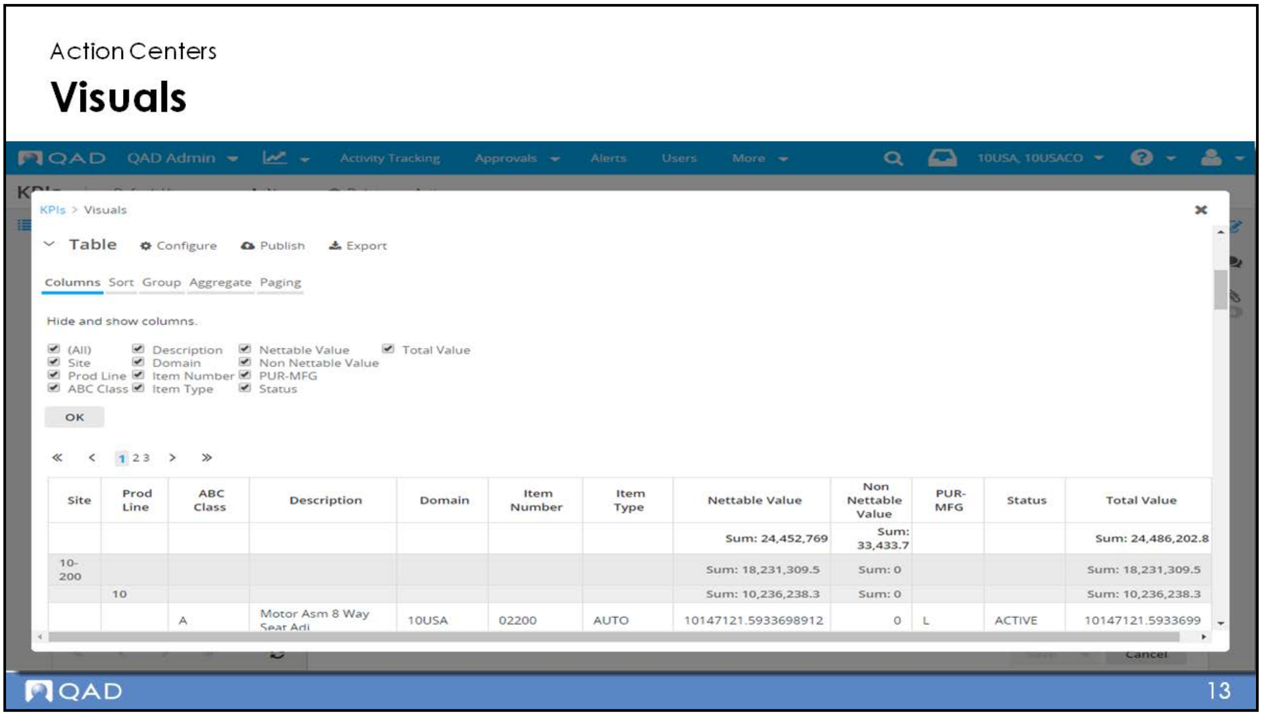
•Manipulate text strings; this feature allows you to shorten text labels that appear in charts so that they are easier to read on screen.

Visuals



The filter area allows you to filter the contents of the table visual based on a particular column. You can build complex filters by adding and connecting simple filters.

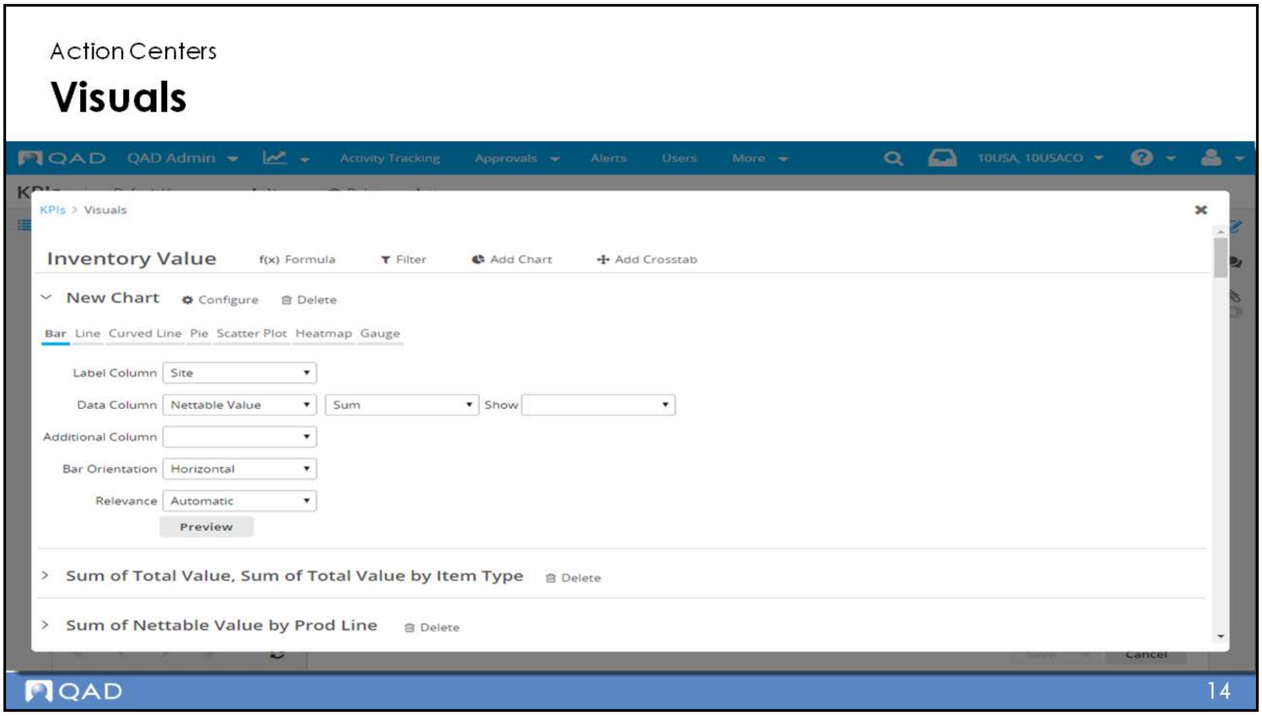
Visuals



Use the table panel to configure how the KPI data displays in the table visual. After you have configured the content, you can publish the table visual to the gallery or export the table.

The Configure option allows you to modify a number of table attributes, and to change how the data in the table is presented by introducing groupings and aggregate amounts based on the top level of data and any groupings. When you click Configure, the attributes display at the top of the table panel. To update a particular attribute, click the attribute heading; the attribute heading then shows a blue underline, and the attribute settings display below this heading.

Visuals



Use the Chart panel to create and edit chart visuals based on the KPI content in the table visual. Your choice of chart depends on the information that you want to show in the KPI. Each chart that you create appears in a separate chart panel above the table visual.

To create a new visual with the Chart panel, click Add Chart. To edit an existing chart in the Chart panel, click the Configure button for the particular chart. When creating or editing a chart, the chart settings show in the panel.

You can choose to display the chart in one of the available formats:

•Bar

•Line

•Curved line

•Pie

•Scatter plot

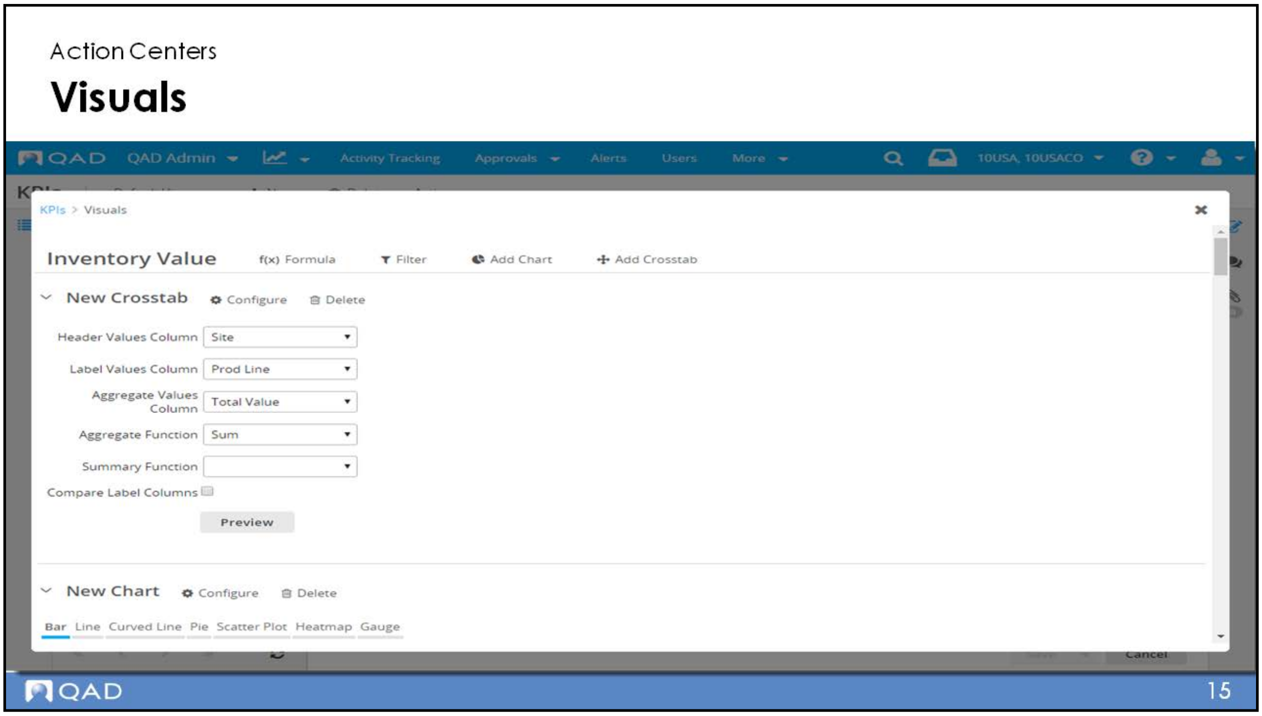
•Heatmap

•Gauge

Click the appropriate chart type; the selected chart type will show with a blue underline. For each chart type, you can specify the data that displays in the chart using different chart settings.

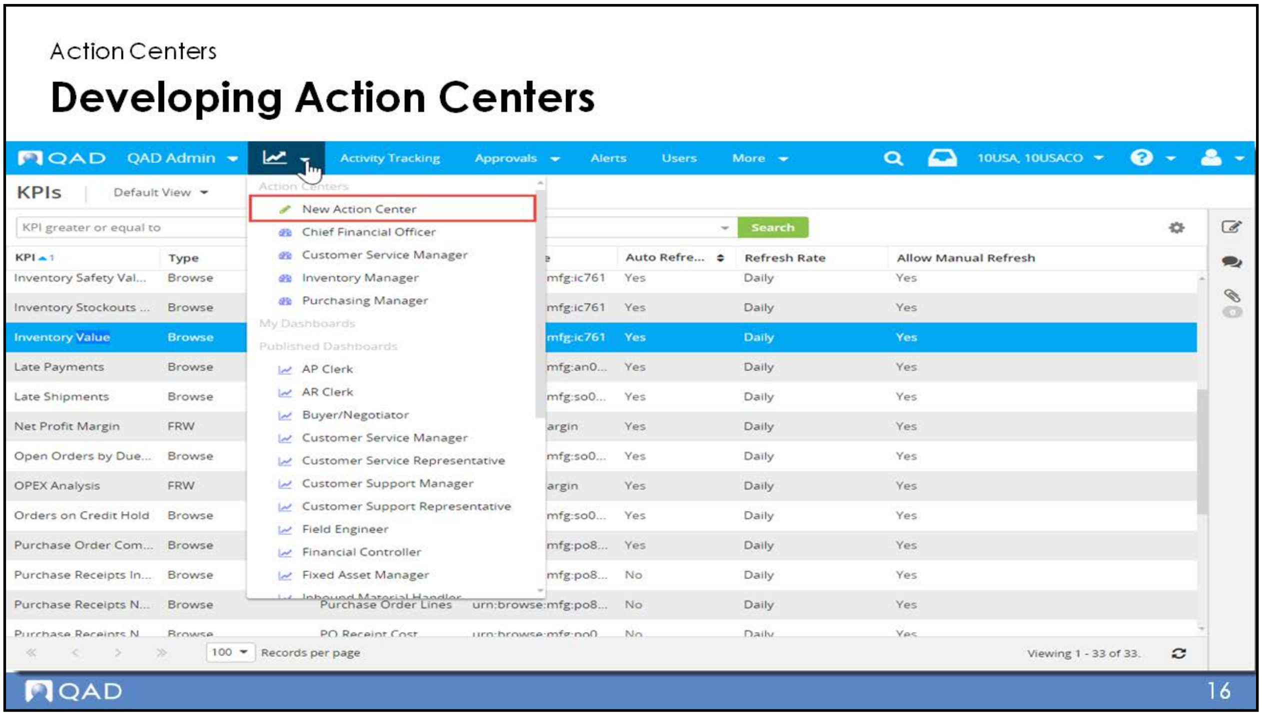
After you specify the chart settings, you can click the Preview button to view the chart. If you want to edit the chart, you can update the settings and click the Preview button again. When you are happy with the chart and want to publish it to the Gallery, click Publish.

Visuals



Cross-tables are small summary tables that transform flat source data into two-dimensional tables with one dimension as columns and the other dimension as rows. This format is not graphical, but it is very easy to read, and it is popular with Excel users. Use the Crosstab panel to create a cross-table visual based on the KPI content in the table. A cross-table visual allows you to convert a row in the table into a column so that you can display data side by side for comparison purposes.

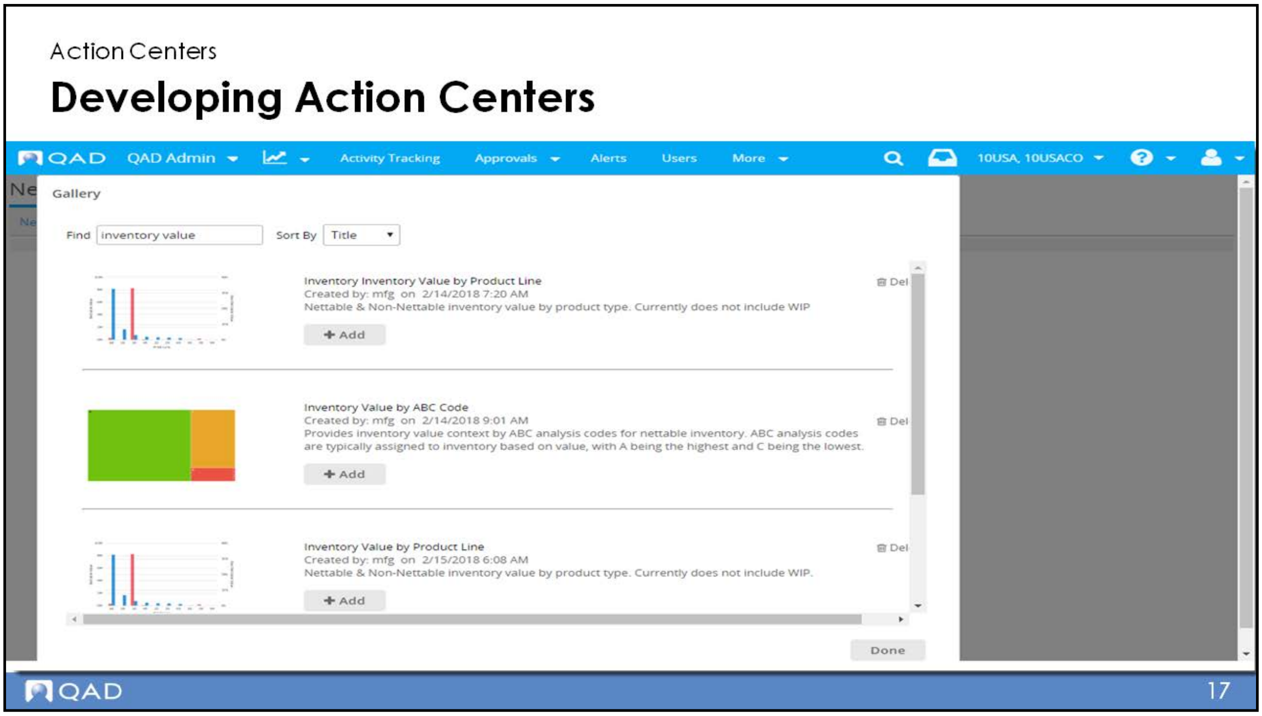
Developing Action Centers



You can create an Action Center to store important KPI visuals that you want to access quickly and easily. You can group related visuals in Action Center tabs, and give these tabs meaningful names. You can modify the layout of these tabs, and adjust the visuals in the tabs to best suit your needs.

To create an Action Center, select the Action Centers and Dashboards menu from the menu bar and choose New Action Center. In the New Action Center modal dialog, specify a name for the Action Center.

Developing Action Centers



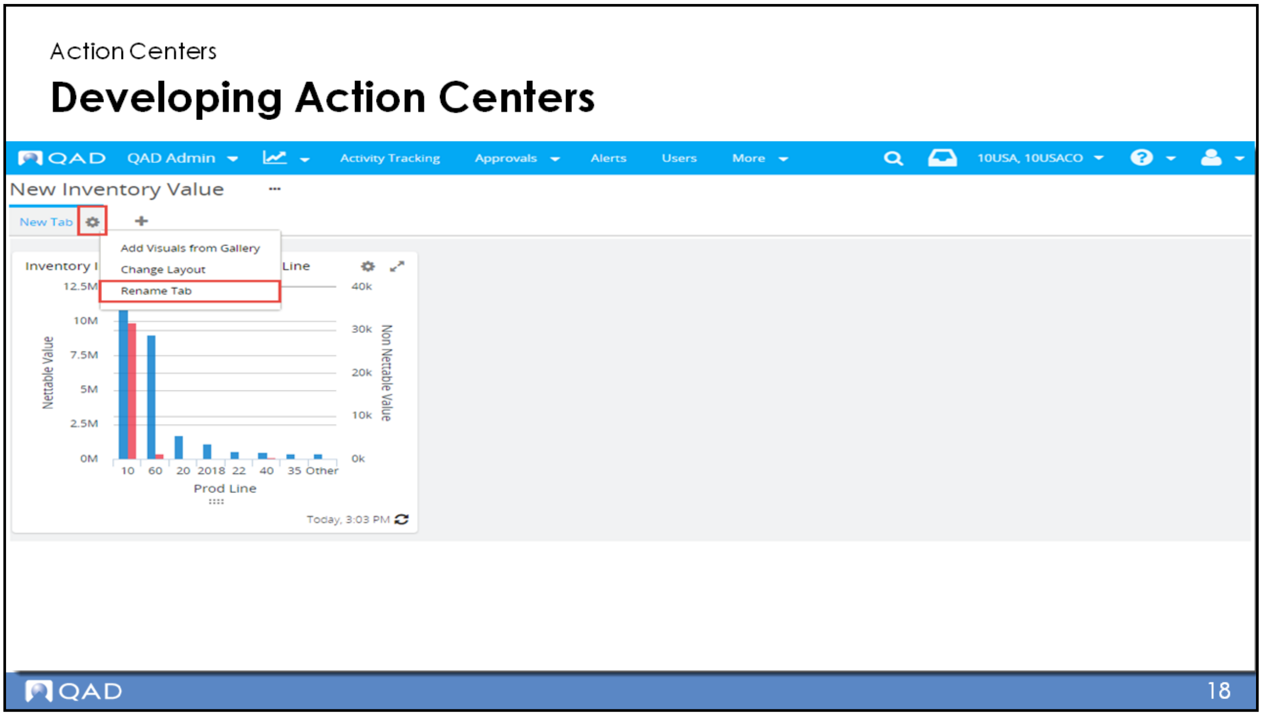
Select the new Action Center from the Action Centers and Dashboards menu to view the Gallery modal window.

In the Gallery modal window, use the Find and Sort options to locate the particular visual that you want to add to the tab. The Gallery displays a preview of each visual, along with information such as the creator, publication date, and a short description. The Gallery consists of both visuals created by users and visuals supplied by QAD as part of the predefined KPI action centers and KPI definitions. To search for visuals related to the predefined Inventory Manager Action Center, for example, specify Inventory as the search text in the search field at the top of the Gallery modal window and press Enter to see relevant visuals in the search results.

Click Add next to each visual that you want to add to the gallery.

Click Done to return to the updated tab. The most recently added visual appears in the top left corner of the tab; any other visuals move right to accommodate this visual.

Developing Action Centers



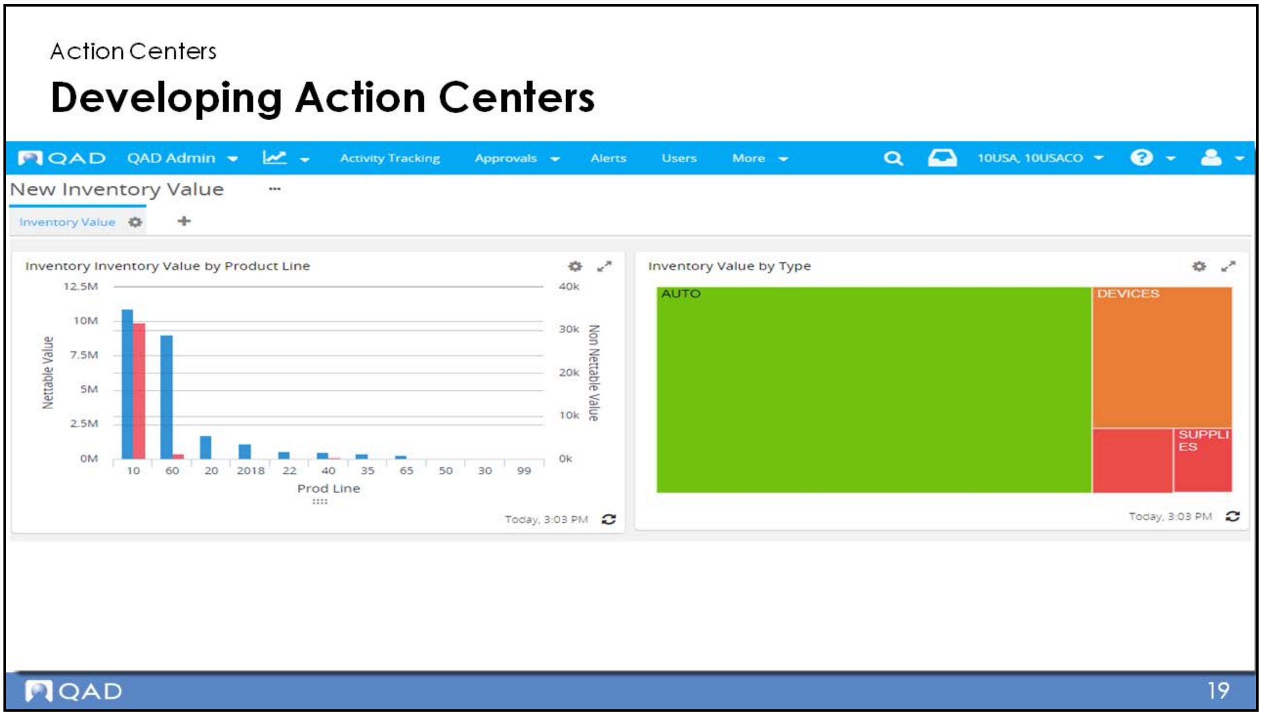
Click the Configuration icon in the tab and choose Rename Tab. Enter the new name and press enter or click another area of the screen to save your update.

Click the + icon below the Action Center name to add more tabs.

Click the Configuration icon for the tab and choose the Add Visuals from Gallery option to add more visuals to an Action Center tab.

Click the Configuration icon for the tab and choose the Change Layout option to update the layout of an Action Center tab.

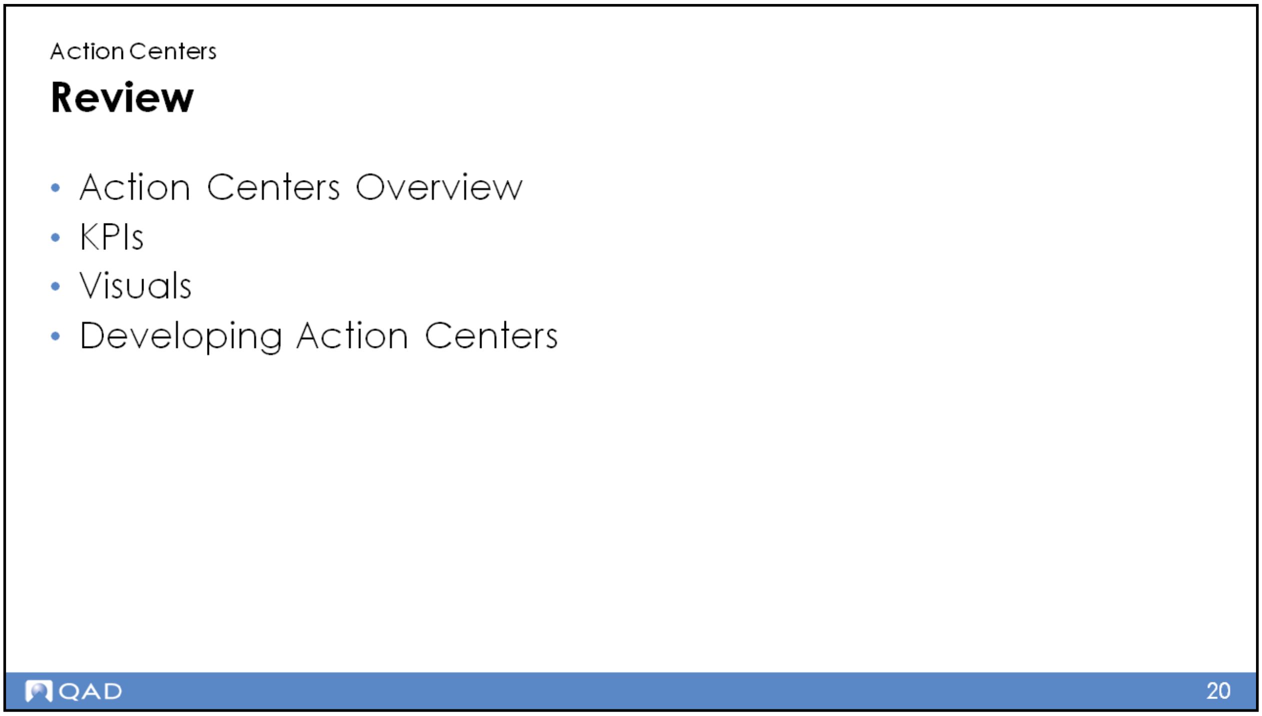
Developing Action Centers



The Action Center is now accessible from the Action Centers and Dashboards menu, and contains the tabs and visuals that you added to it, in the chosen layout.

You can access the Action Center at any time to view, analyze, and update the KPI visuals. You can update the Action Center regularly to reflect the needs of your business.

Review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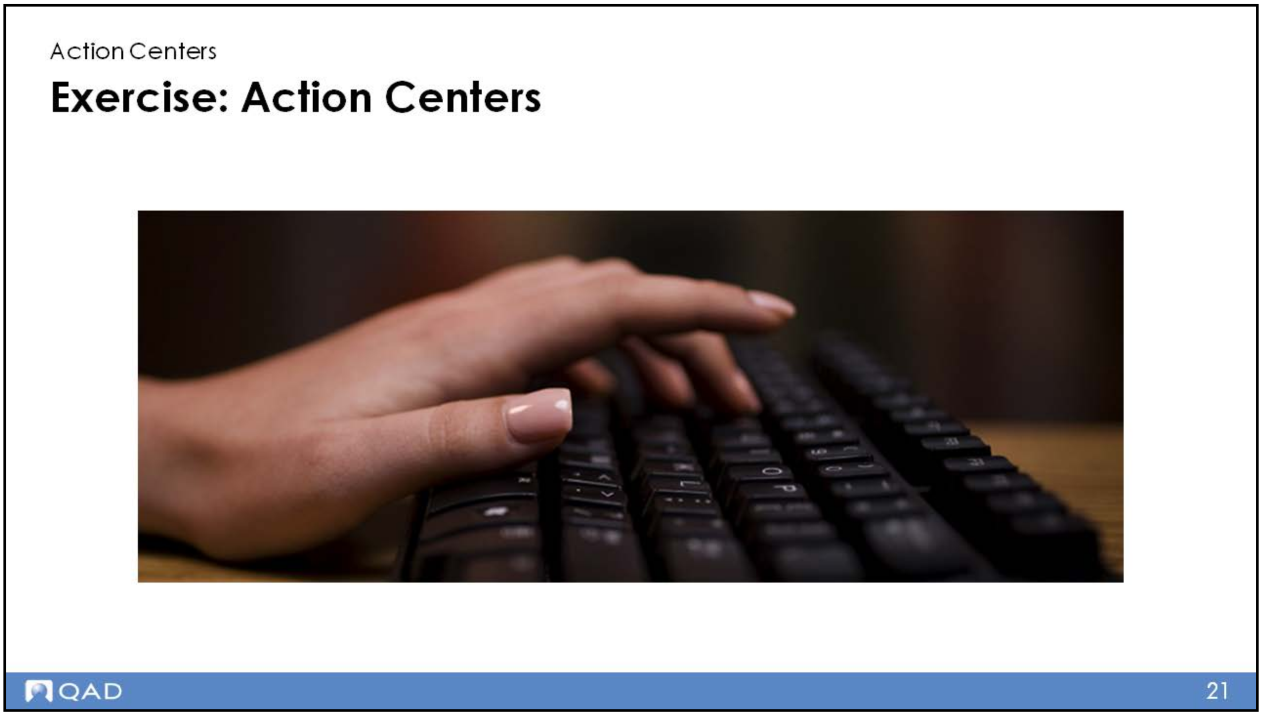
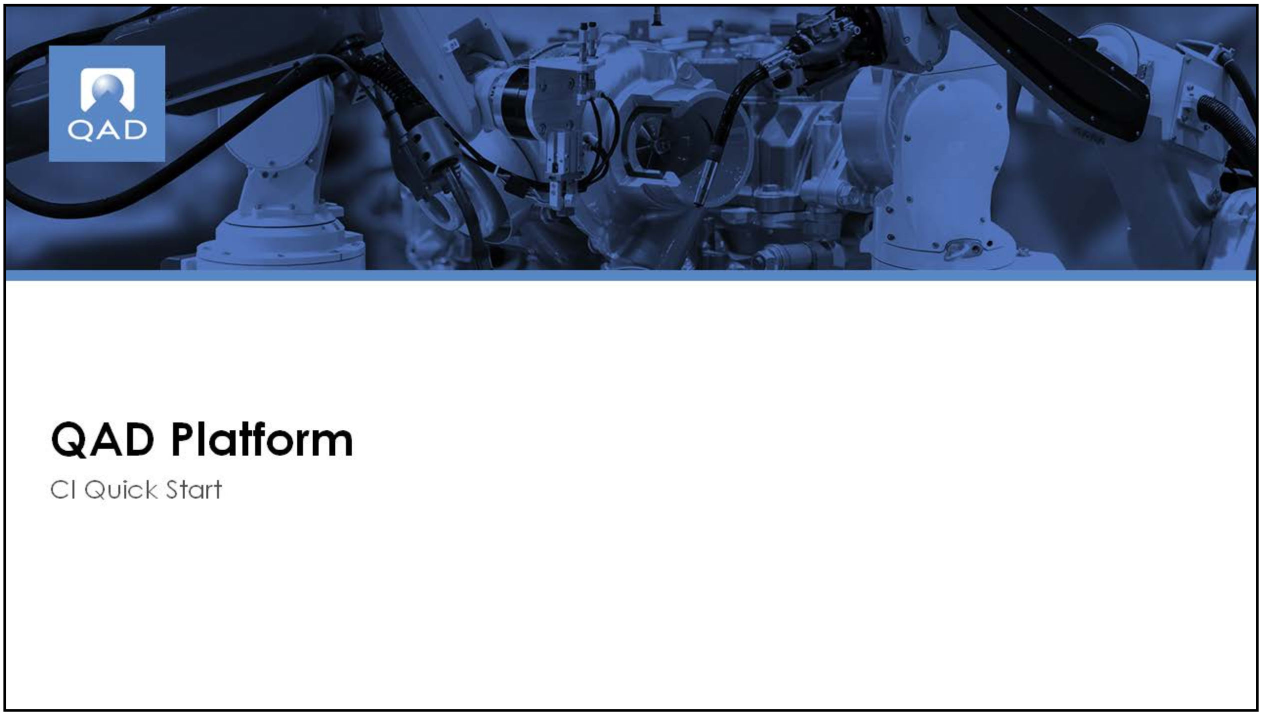
Exercise: Action Centers



Chapter 9

QAD Platform


QAD
QAD Platform
CI Quick Start

Overview

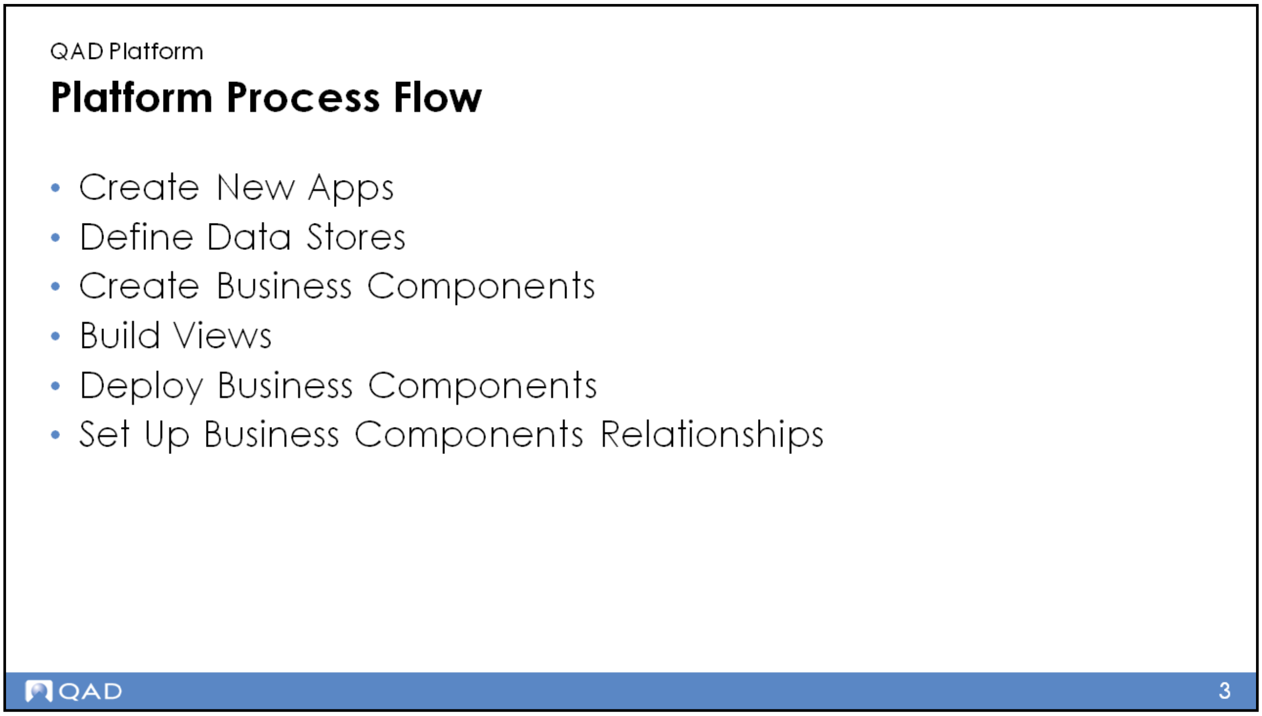
QAD Platform

Overview

- Platform Process Flow
- Apps
- Data Stores
- Business Components
- View Builder
- Business Components Deployment
- Business Components Relationships

QAD 2

Platform Process Flow

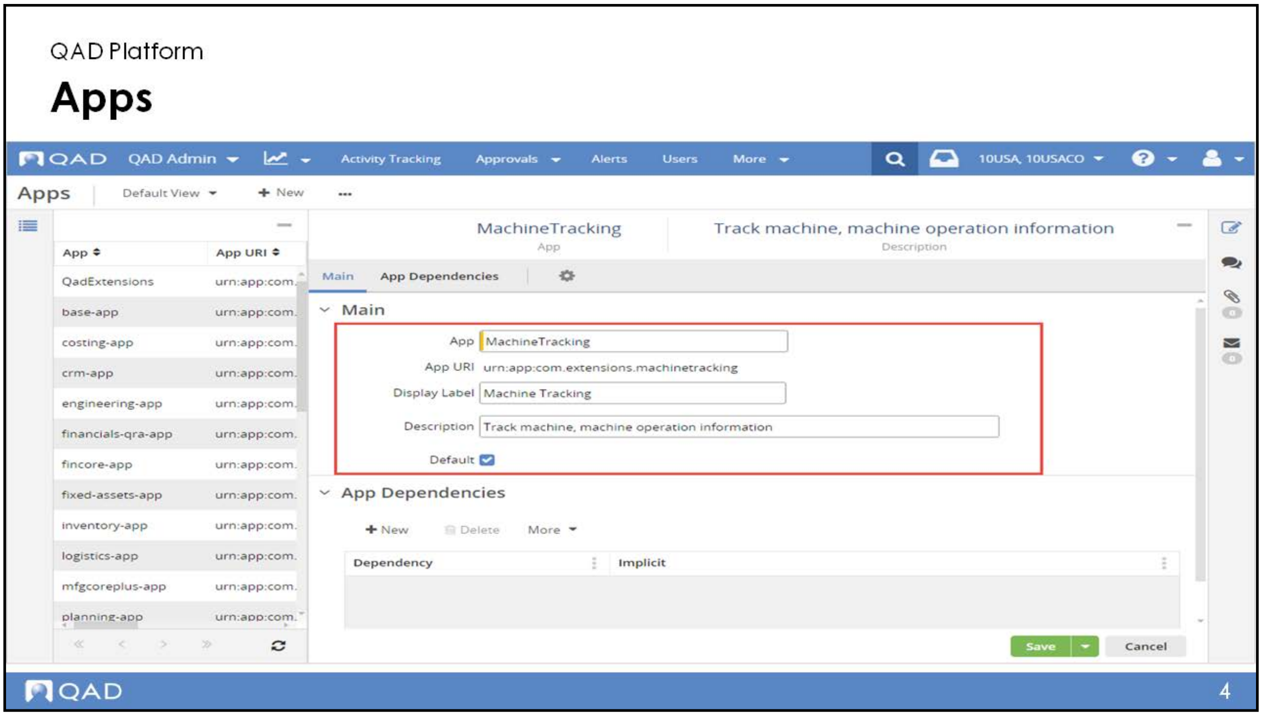


The QAD Platform allows you to extend the QAD product by adding a new Business Component.

The QAD Platform includes Data Stores, Apps, Entity Builder and utilizing the View Builder to create views, allowing users to interact with new Business Components.

The process starts with creating an app and then defining the data stores in the system. Next, you can create a Business Component and build a view and form for it. After you have deployed the Business Component, you can access and run it. You can also set up relationships for some Business Components.

Apps



An App is a container of all your specific development artifacts for extensions. For example, you can create an app for tracking machines and machine operators information.

In the Apps maintenance form, you can enter the App name in the App field. A new app always belongs to what we call the “environment namespace”. This is defined at install time of the environment and cannot be changed.

The app URI will automatically populate based on the entry in the App field. The App URI is read only as it is the unique system data associated to the app. This is the namespace for this app only.

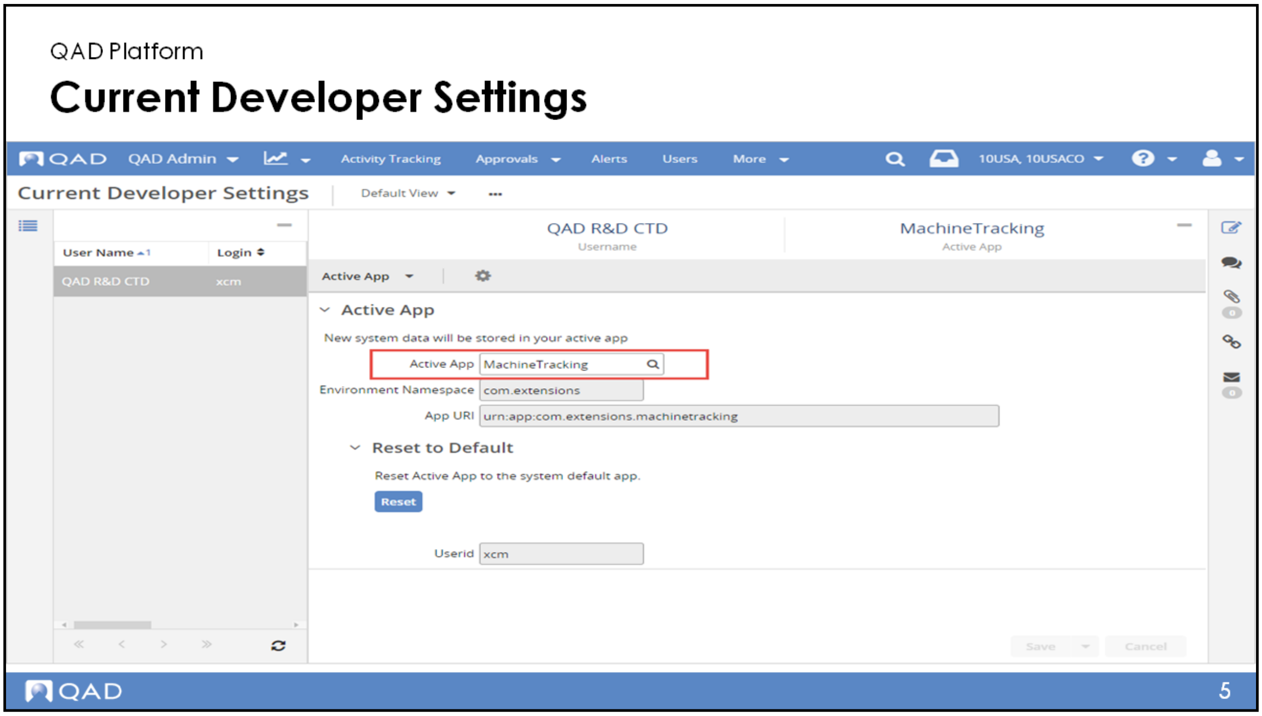
You can enter the display label for the app. The display label determines how the label associated with this app displays from the browse.

Enter a brief description of your app.

Select the default field to make this app a system default; all created system data will be associated with this app from this point. There is only one default app in the system at a time.

An app can have implicit or explicit dependencies on other apps. Any implicit dependencies are listed automatically. If you know that the new app will be dependent on another app, you can add that app here as an explicit dependency. For example, if the new app extends the capabilities of an existing app, then you can identify that existing app as an explicit app dependency.

Current Developer Settings

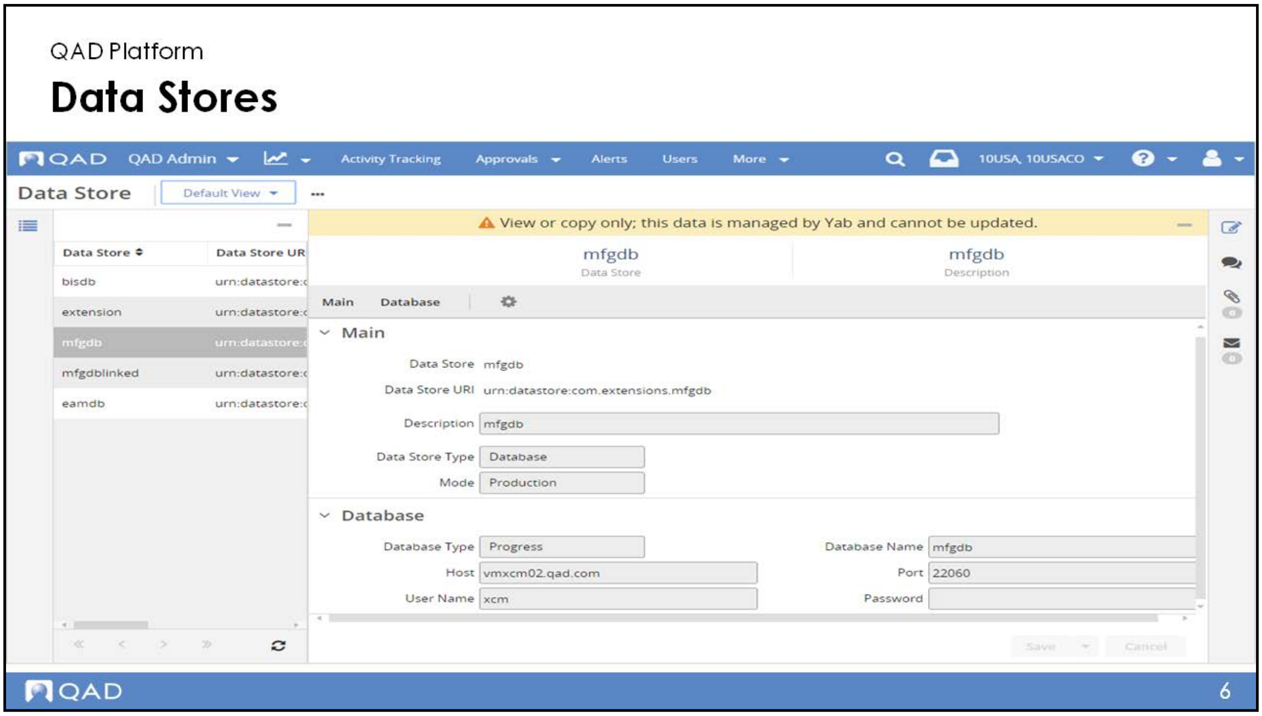


When new data is created, it is automatically stored in the current user’s Active App. Every user’s Active App will default to the system default App, but the user can change it.

An individual user may want to override the default app set by an administrator. To do this, the user can open the Current Developer Settings and select the desired Active App.

You can launch Current Developer Settings from the top menu. In the Active App field, you choose another app as the current user’s active app.

Data Stores



A Data Store is where data is stored and retrieved in the system. When you define a Business Component, the system will need to know where to store the structure and data of the Business Component.

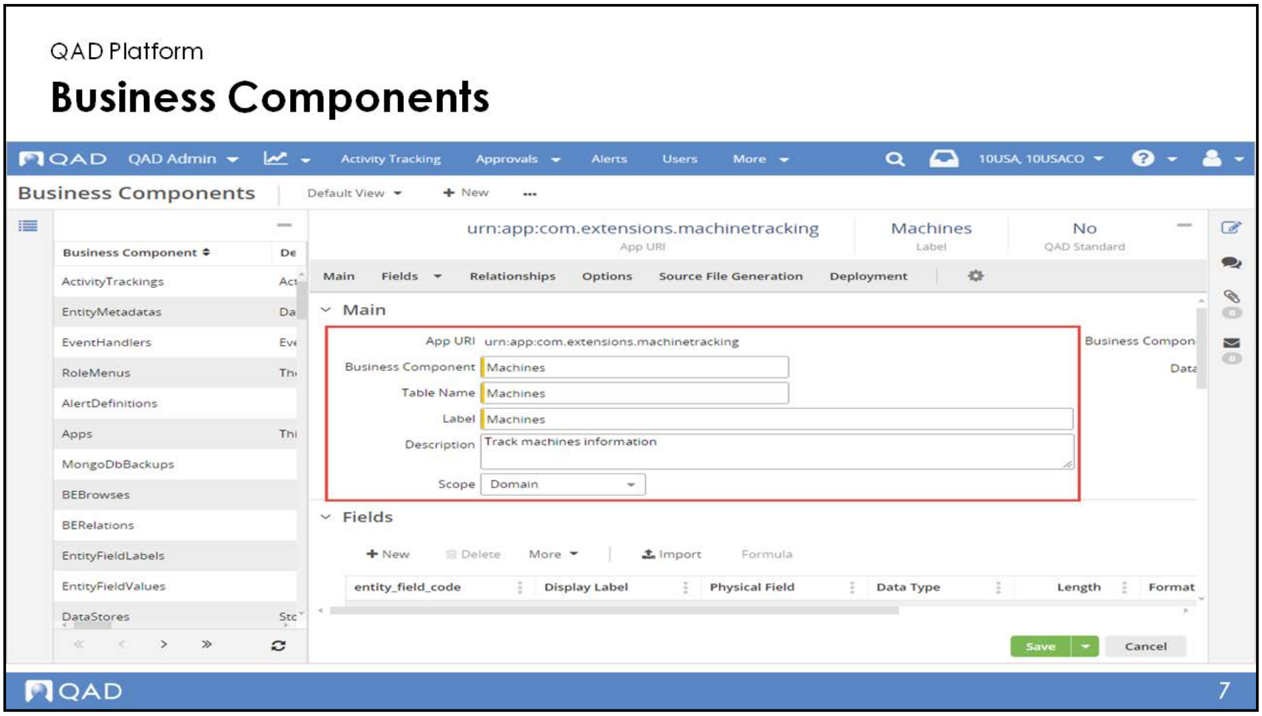
Normally after the system installed, the mfgdb data store will be created automatically by YAB. You can use it to store newly created Business Components.

You can use YAB commands to enable the data store and create the data store record for other customization databases.

Use the Data Stores view to establish the data stores associated with your business components.

Notes: The mode of the data store is DEVELOPMENT or PRODUCTION. Business components can be deployed only to data stores in DEVELOPMENT mode.

Business Components



A Business Component (BE) encapsulates the business logic and data necessary to represent business activities, such as sales orders, within the application.

The Business Component Builder is a hybrid view that shows all Business Components that exist in the system. This is a mixture of Business Components that can be controlled in the current environment and Business Components that have been installed as part of other app packages.

The Business Components maintenance form contains the Main, Fields, Field Groups, Relationships, Options, and Deployment panels.

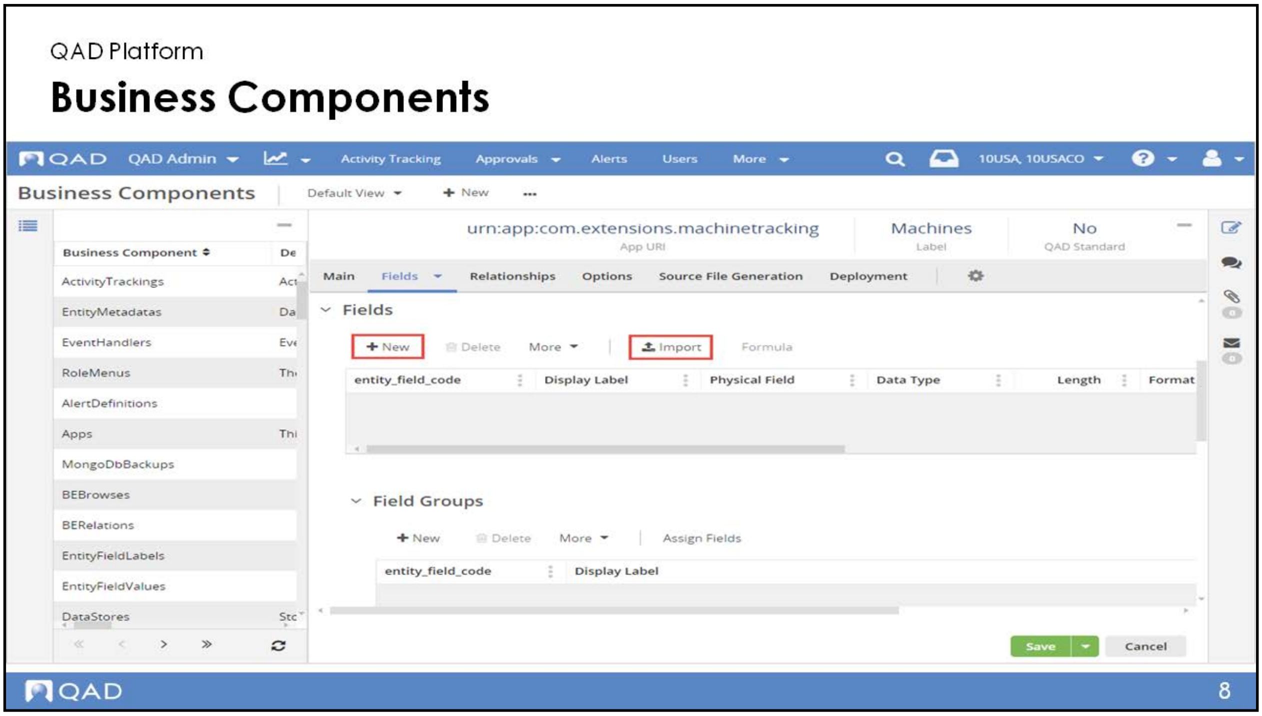
In the Main panel, the App URI is set to the default app in the system, or the active app if one is set for the current user.

Enter the name of your Business Component. The Business Component code and URI will be generated automatically based on the App URI and Business Component name.

You can enter label, description, and select a scope for the Business Component.

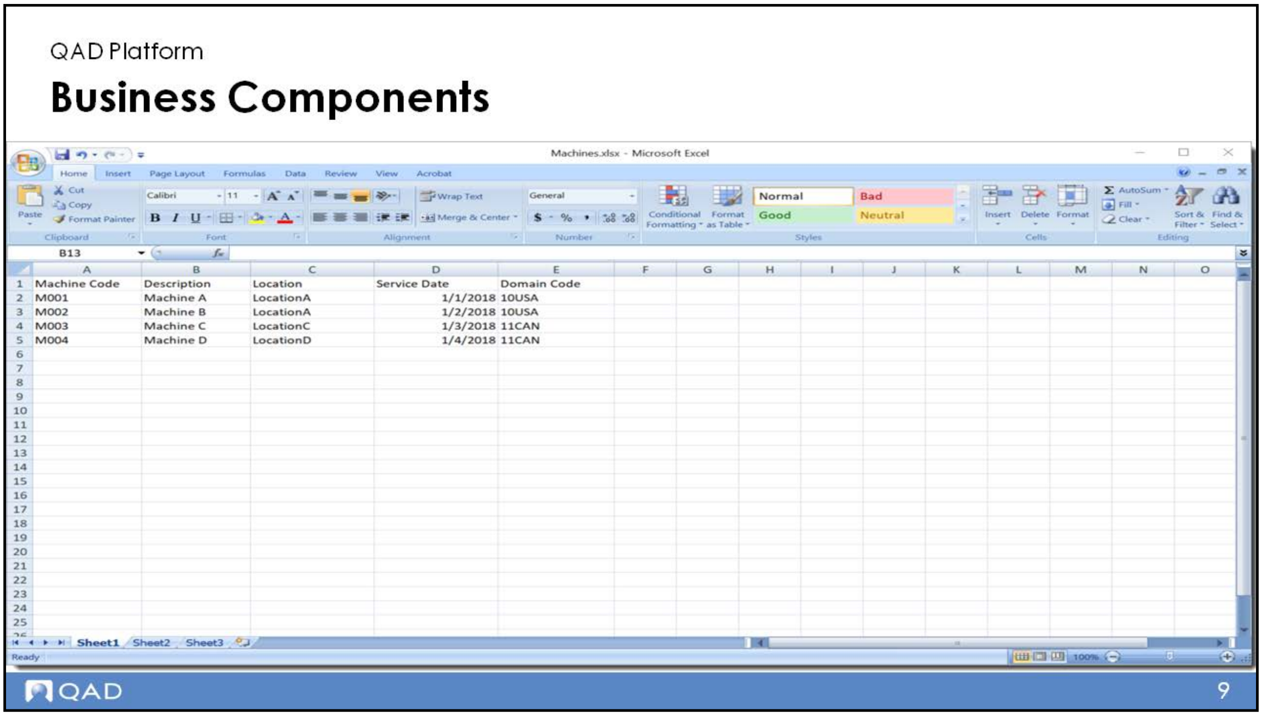
When Business Component is defined in a QAD-owned app, the QAD standard will be selected. These apps always belong to namespace “com.qad”.

Business Components



In the Fields panel, you can click the New icon to add new fields for the Business Component. Or you can click the Import icon to add fields from an Excel file.

Business Components

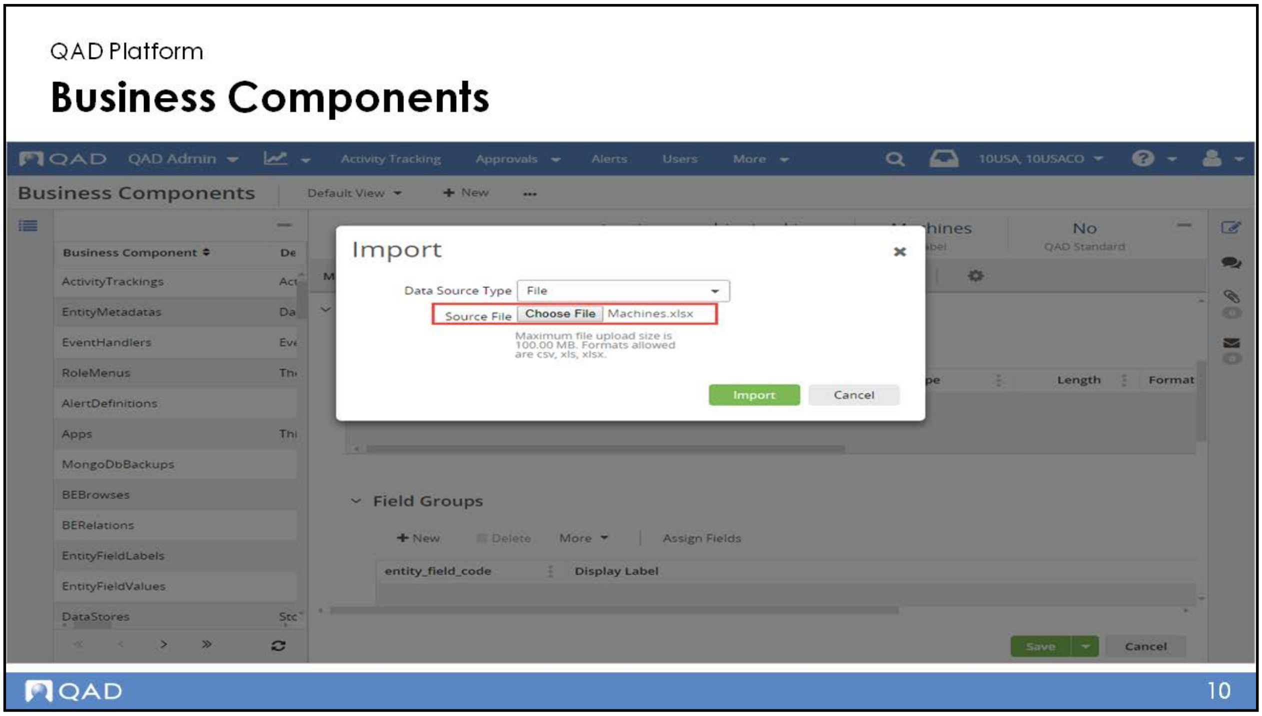


In the Excel file, enter the field names in the first line. Enter field values in the following lines.

The system will determine the field type based on the field value.

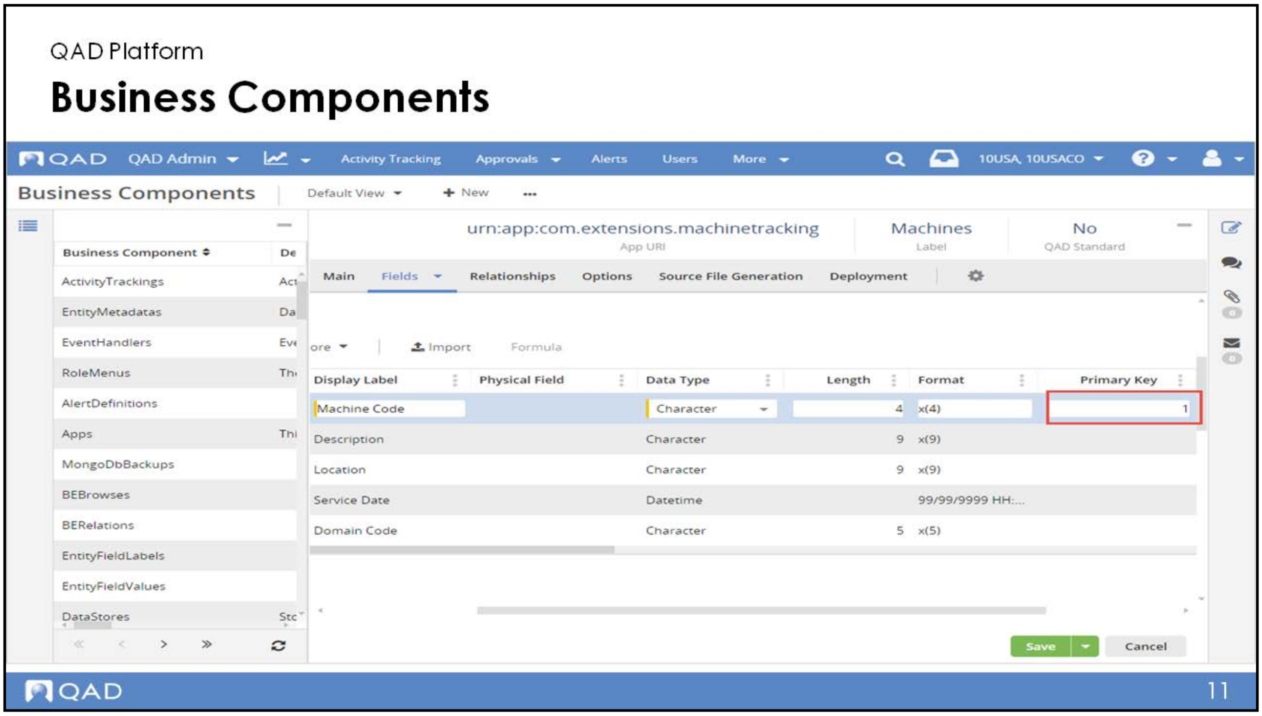
This is a fields example for the Machines Business Component.

Business Components



Click the Choose File button to choose the fields definition Excel file from your local drive. Click the Import button to finish the import.

Business Components



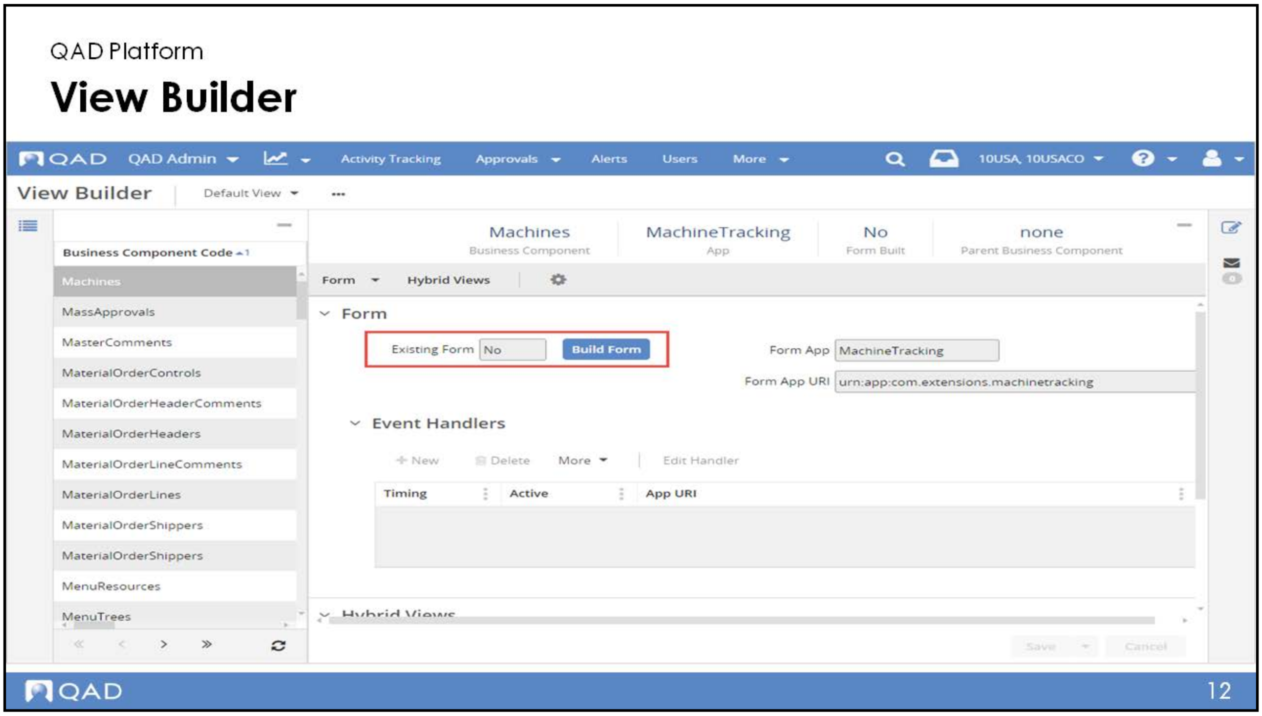
Review the imported fields definition and specify the proper numerical order for the primary key fields in the Fields frame.

For our example, the Machine Code is the primary key, so we enter 1 in the Primary Key field.

Click the Save button to save the Business Component data.

So far we have done part of the Business Component setting and will add more data and deploy it later on.

View Builder



The View Builder functionality allows you to build views for visual representation of your Business Components.

The View Builder view allows you to create and organize the forms users will use to interact with your Business Component.

It also allows you to define the hybrid view and define the browse that should be used for selecting your Business Component from the menu.

In the View Builder, you can build the Business Component’s form and hybrid views. A hybrid view is a view that brings together a form and a browse.

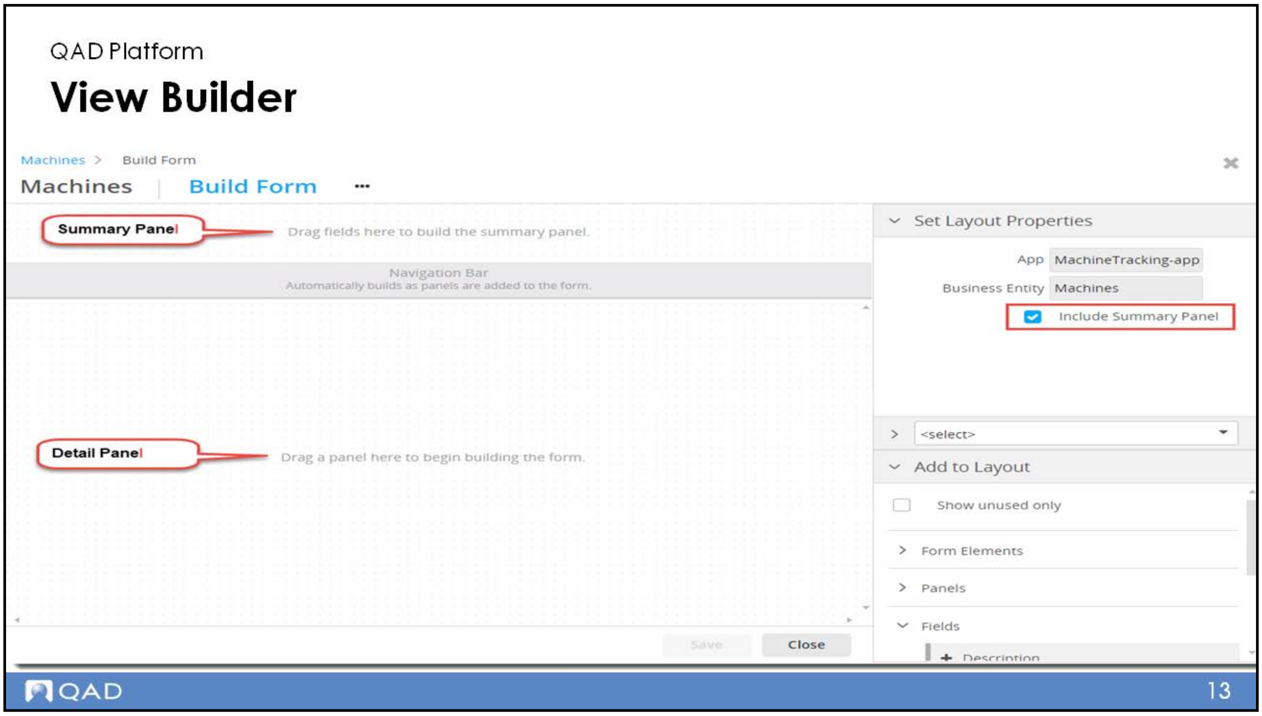
In the maintenance screen, the top line are the Business Component name, App name, Form Built status, and the Parent Business Component name.

For our example, the Business Component name is Machines, the App name is MachineTracking-app, the Form Built status is No, and the Parent Business Component name is none.

In the Form frame, the Existing Form is read-only and indicates whether or not a form has already been created for the selected Business Component. The right side button may display Build Form or Edit Form based on the value of the Existing Form field.

If Existing Form is No, you can click the Build Form button to add a new form for the Business Component. If the Existing Form is Yes, you can click the Edit Form button to update the form for the Business Component.

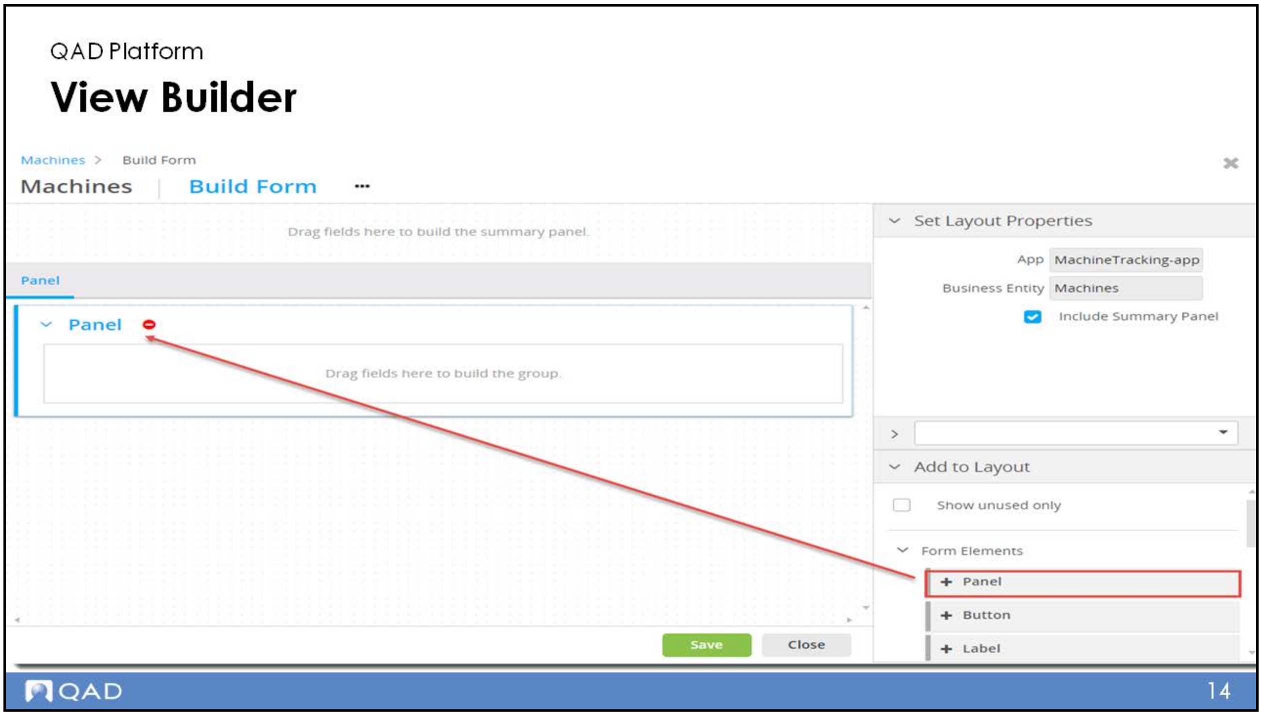
View Builder



In the Build Form maintenance screen, the left side includes the summary panel and detail panel area. You can design the new form layout there. The right side is for setting the layout and panel properties.

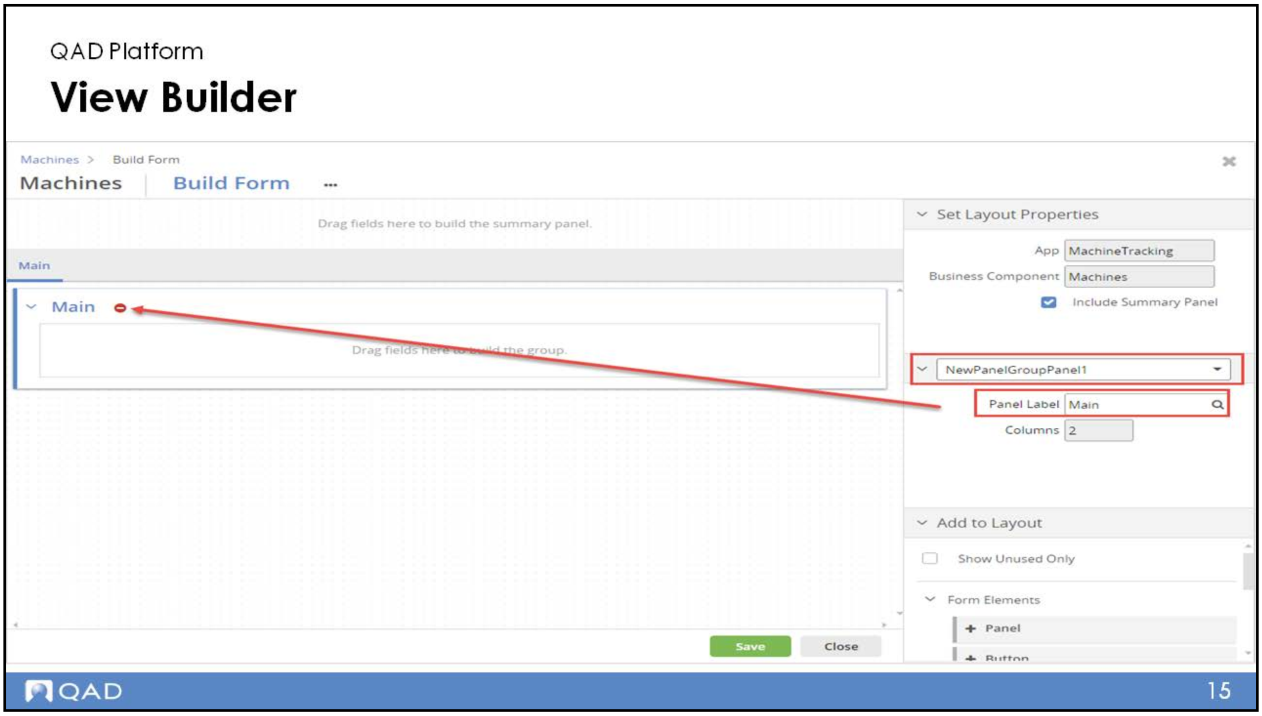
In the Set Layout Properties frame, the App and Business Component are read-only. The App displays the app to which the form will be stored. The Business Component displays the Business Component for which the form is being built. You can click the Hide summary panel to hide the summary panel from the form.

View Builder



To add a new panel in the form, in the Add to Layout frame, you can drag and drop the Panel icon from the Form Elements to the left-side detail panel area. If needed, you can also add new Button, Label, Grid, Group, and Field values.

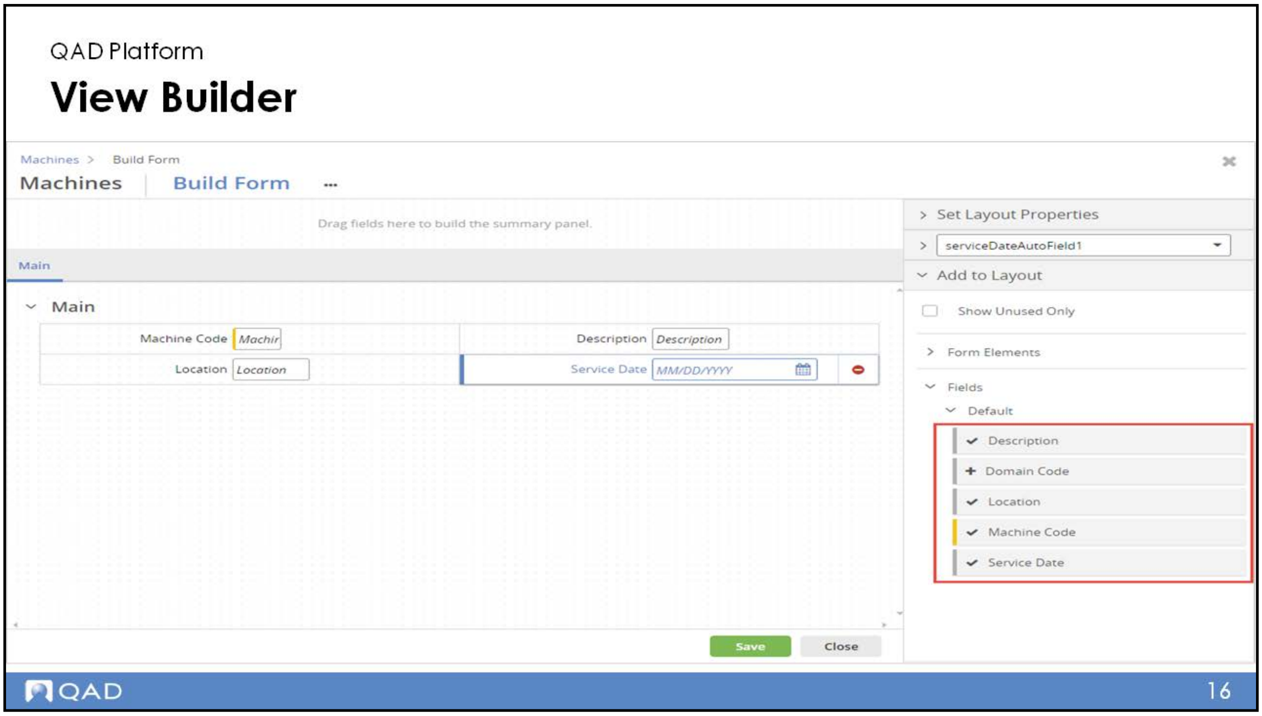
View Builder



When a panel is selected on the form, panel properties display on the right.

You can see a new panel group name is created by the system automatically. The Display Label is the label for the panel and it is updatable.

View Builder

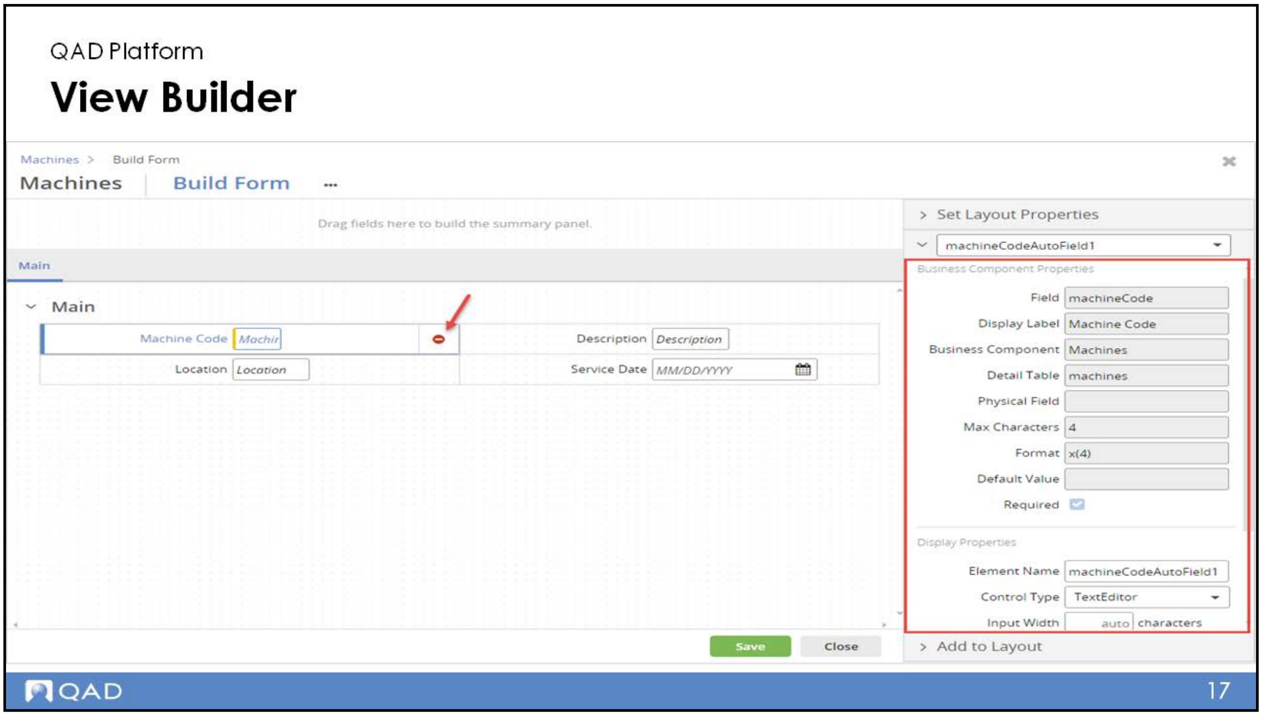


You can add fields to the panel by dragging-and-dropping the plus sign field to the new panel area.

For our example, you drag and drop the Machine Code, Description, Location, and Service Date fields to the Main panel.

After dropping the fields into the panel, the plus signs on the fields become check marks.

View Builder

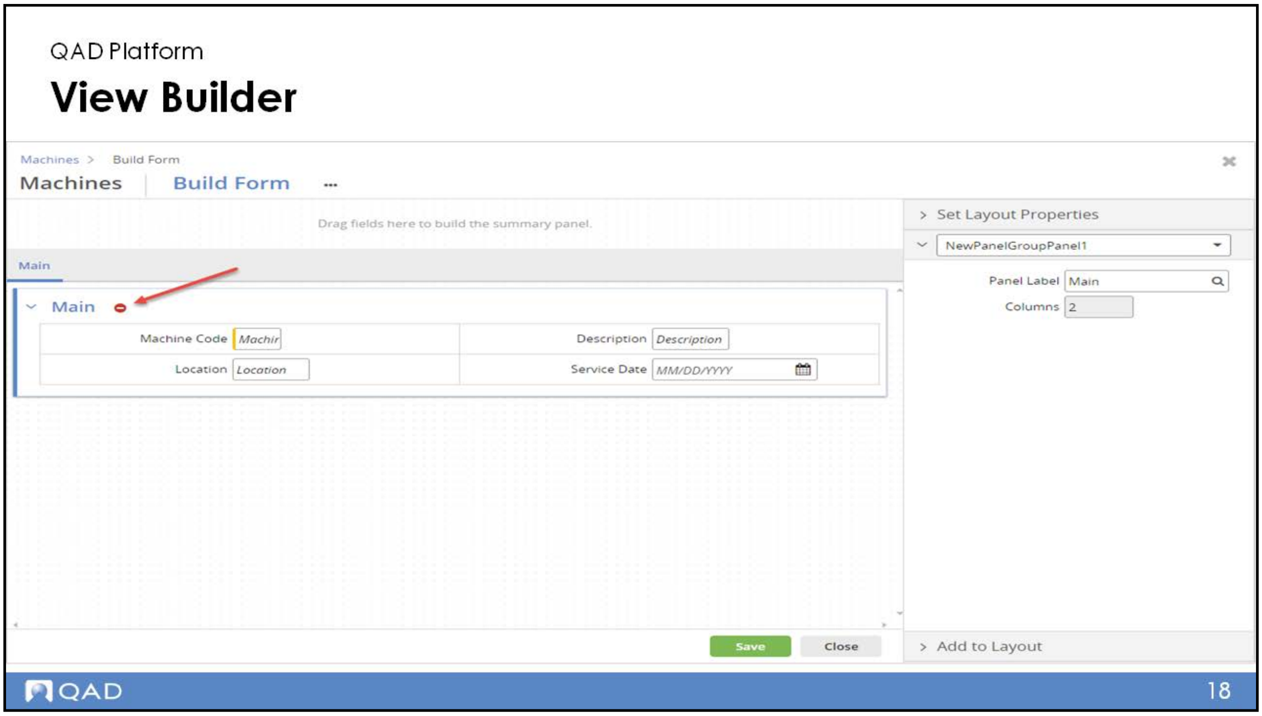


When a field is selected on the panel, the field properties are displayed in the Set Properties frame on the right side.

Field properties are defined in the Business Components screen. Any changes must be done on that screen, and cannot be made from here. This is for viewing only.

If you want to remove the field, click the red minus sign.

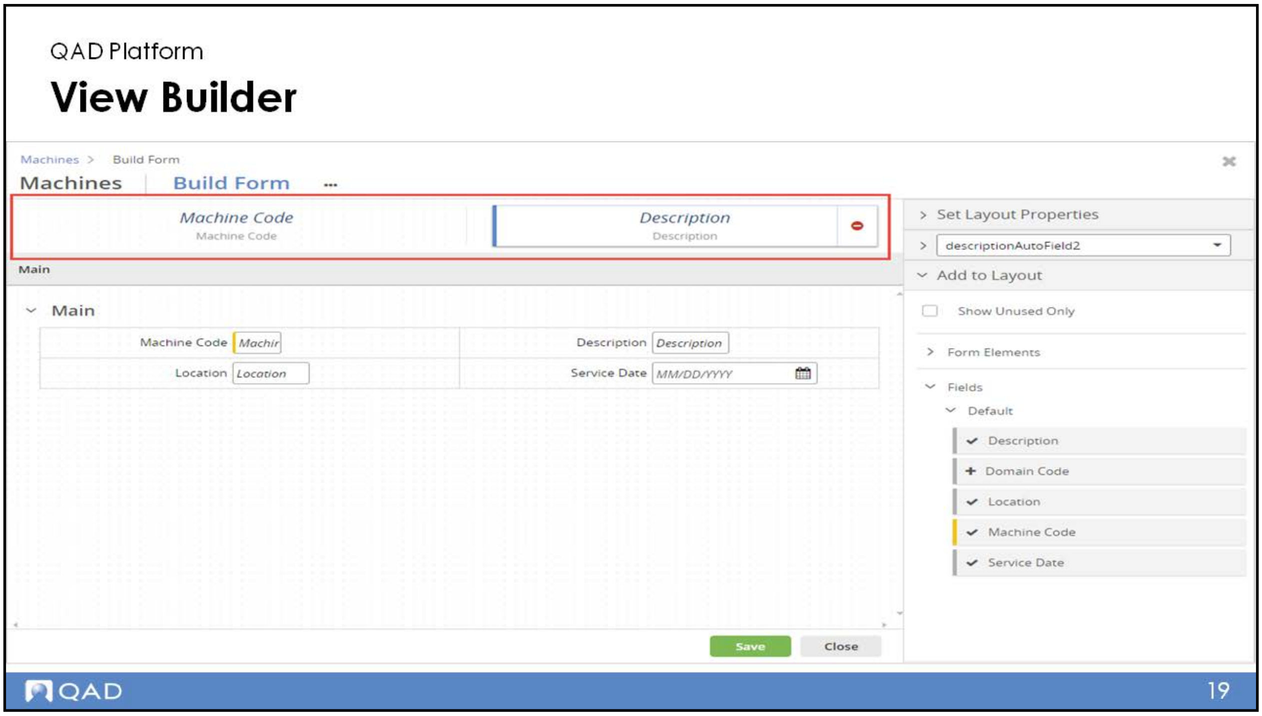
View Builder



If you want to remove the panel, select the panel and click the red minus sign besides the panel label.

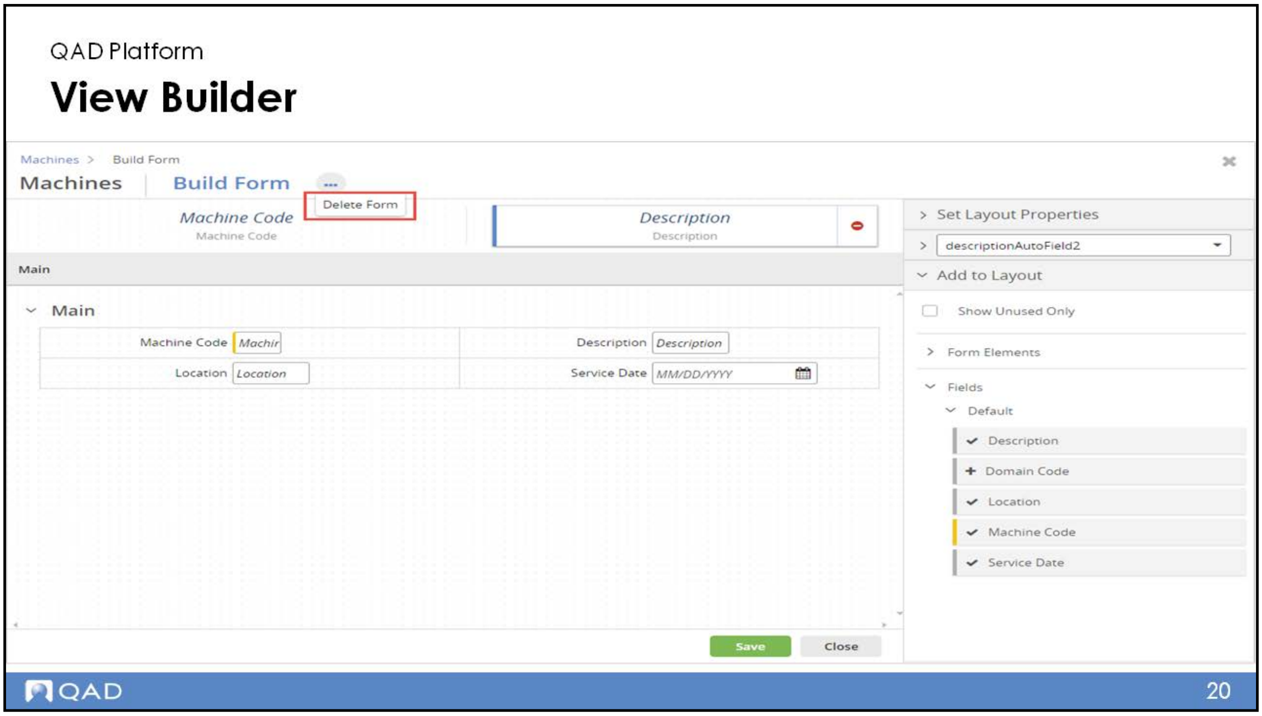
In the same way, you can add other new panel and add other fields to it.

View Builder



You can also drag and drop some fields to the summary panel. Click the Save button to save the update.

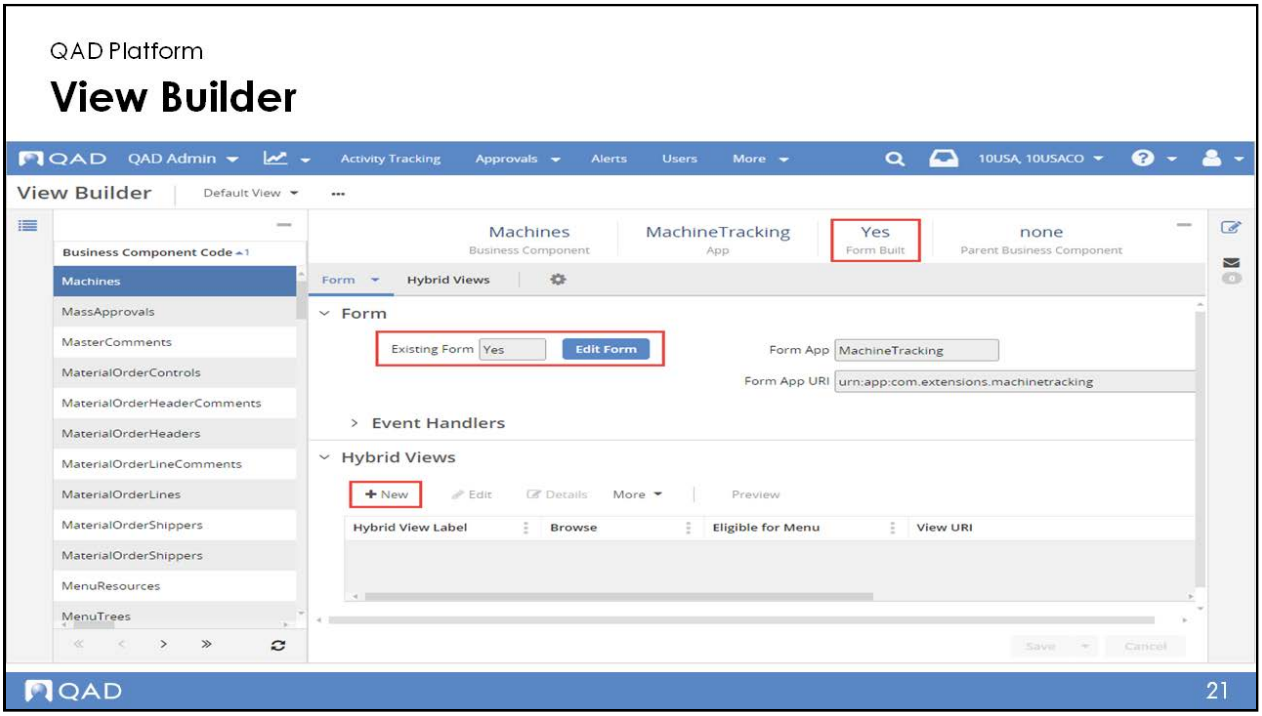
View Builder



If you want to delete a previously built form, select Delete Form from the ellipsis icon (...) on the toolbar.

Deleting a form will also delete all hybrid views created using that form, even if those hybrid views are in use. A confirmation message will ask the user if they would like to continue with the delete. For our example, you click Cancel to keep the built form.

View Builder



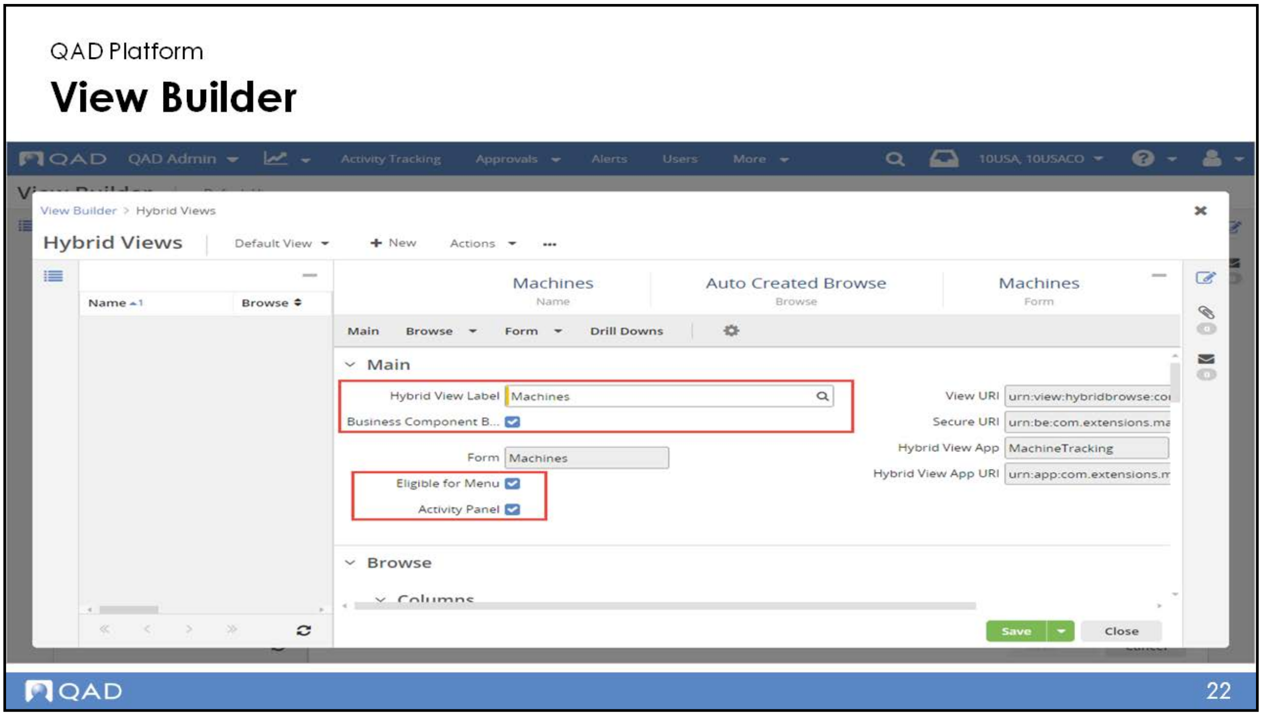
In the View Builder maintenance screen, you will find that Existing Form and Form Build now become Yes. And the button on the right side of Existing Form now becomes Edit Form.

Once a form has been built, hybrid views can be created using that form. The buttons in this panel are disabled until a form has been built.

Click the New icon to create a new Hybrid View.

Click the Details icon to open the Hybrid Views details modal in Edit mode for the selected row. If no row is selected, the system opens the modal in New mode.

View Builder



In the Hybrid View Main frame, enter the Name and Browse fields.

The Name field provides a name for the hybrid view to differentiate from additional hybrid views for that Business Component.

The Browse field lets you select a browse to associate with the form. When you build the Business Component, the browse will be created automatically.

The Form field defaults to the currently select Business Component.

The Eligible for Menu field determines if the hybrid view should be eligible for the menu. If this is checked, the hybrid view will be available from the menu search as soon as the view is saved.

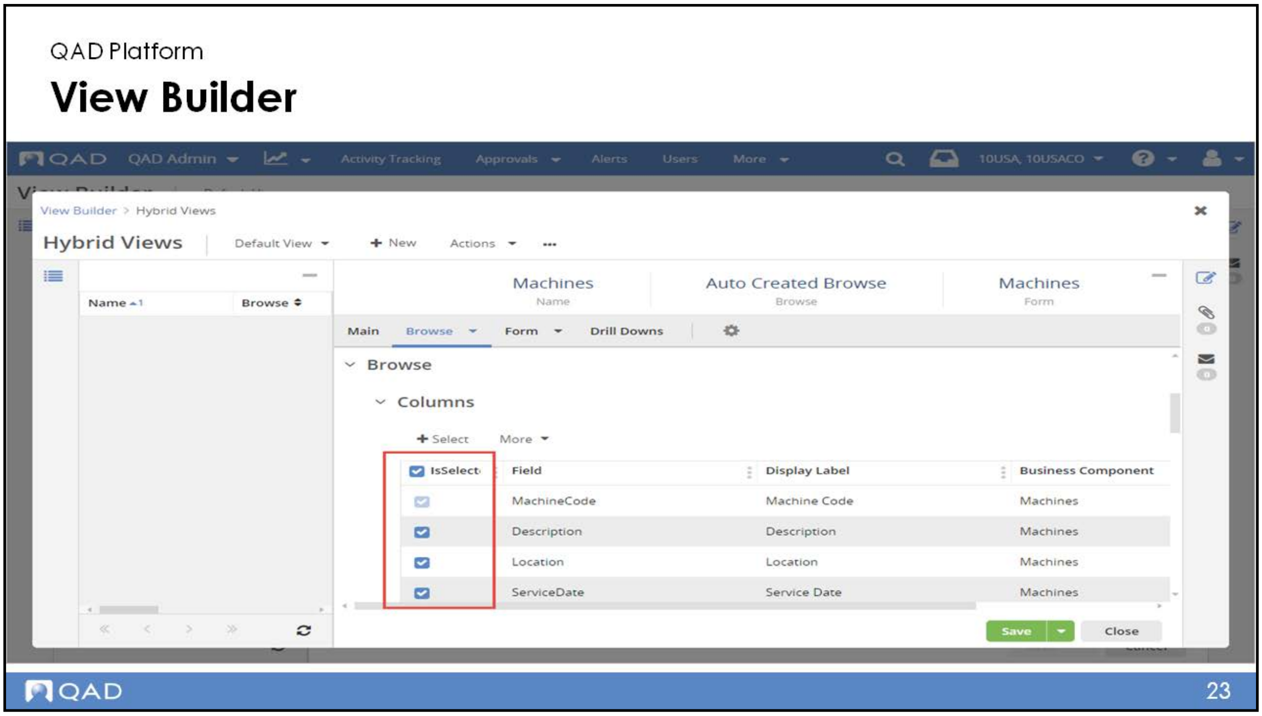
The View URI is read-only. This is where the View data is stored.

The Secure URI is read-only. This is where the Secure data is stored.

The App is read-only and defaults from the user’s active app. It cannot be changed.

App URI is read-only and defaults from the user’s active app. It cannot be changed. This is where the App data is stored.

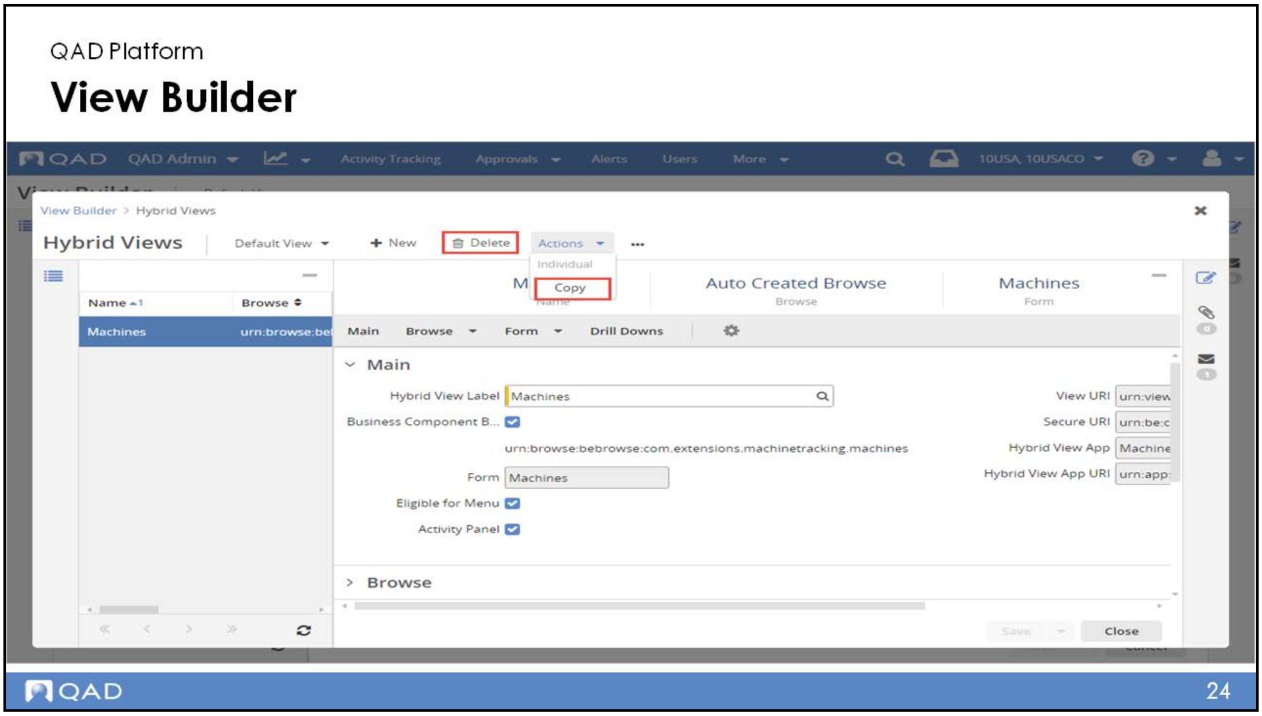
View Builder



In the Browse frame, select the fields for the browse columns. The key field selection boxes are read-only and they are selected automatically.

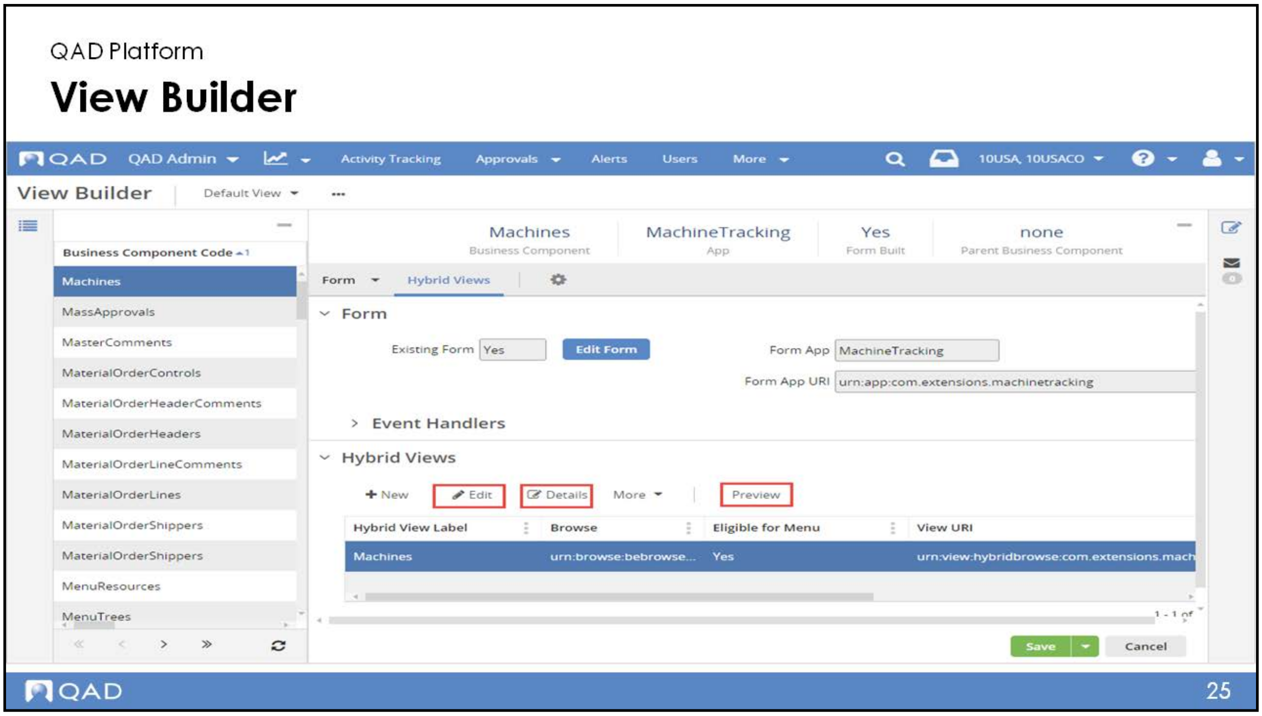
Click the Save button to save the Hybrid View data.

View Builder



You can copy a Hybrid View by selecting the Copy from Actions menu in the Details modal. Or you click Delete in the top menu to delete the selected Hybrid View.

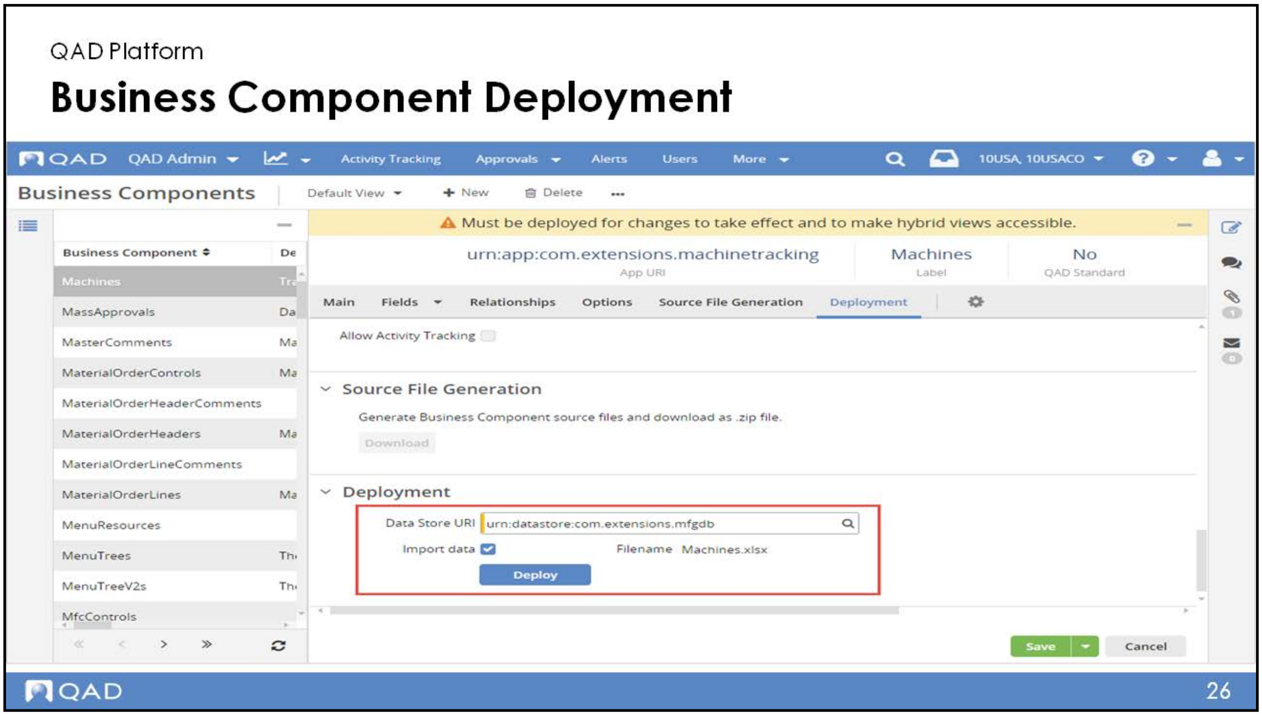
View Builder



You can select one Hybrid View record and click the Edit or Detail icon to review or update the data.

You can select one Hybrid View record and click the Preview icon to launch the hybrid view in a new browser tab. The Business Component must be deployed in the Business Components Builder screen before it can be previewed.

Business Component Deployment



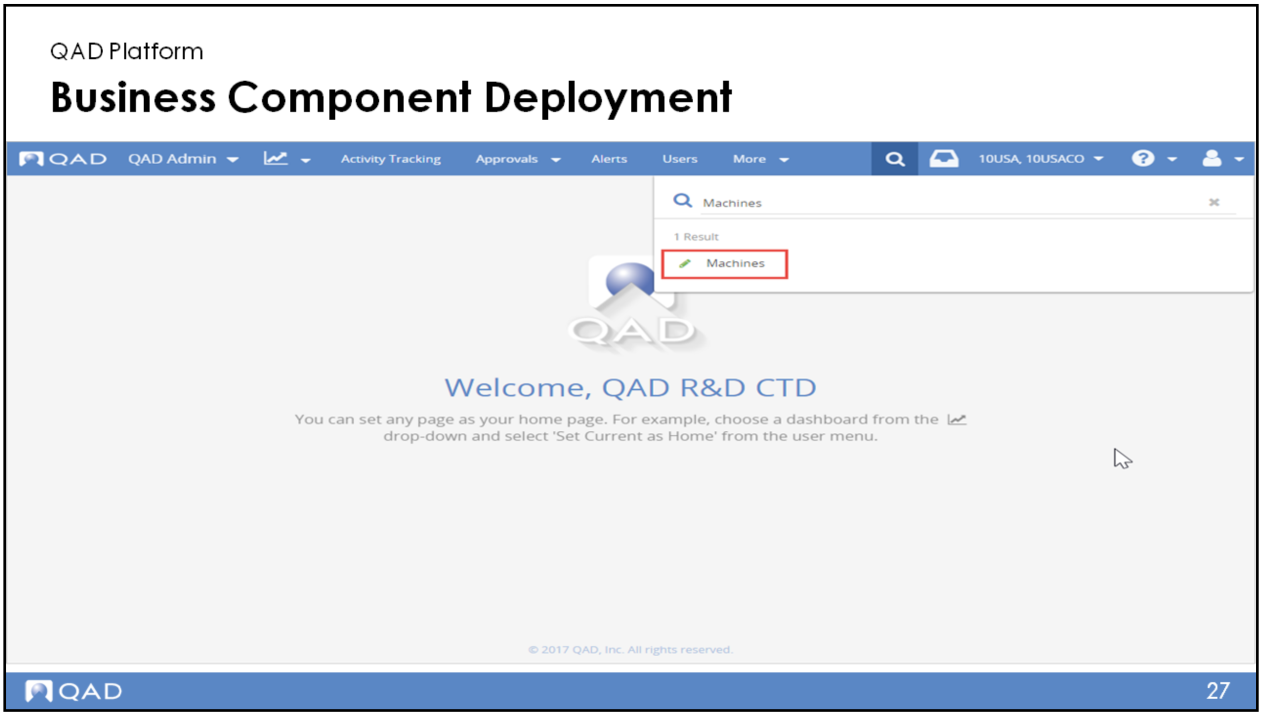
Deployment of a Business Component is a process of verifying if everything is available and correctly defined for the Business Component. This includes having available view and view resources available.

Select a Data Store URI to indicate the URI of the data store that is used to store the schema and the data of the Business Component.

Select Import data to import data from the data source the Business Component definition has been loaded from. If the BC definition is not loaded from a file, you cannot select this field.

Click the Deploy button to deploy the Business Component.

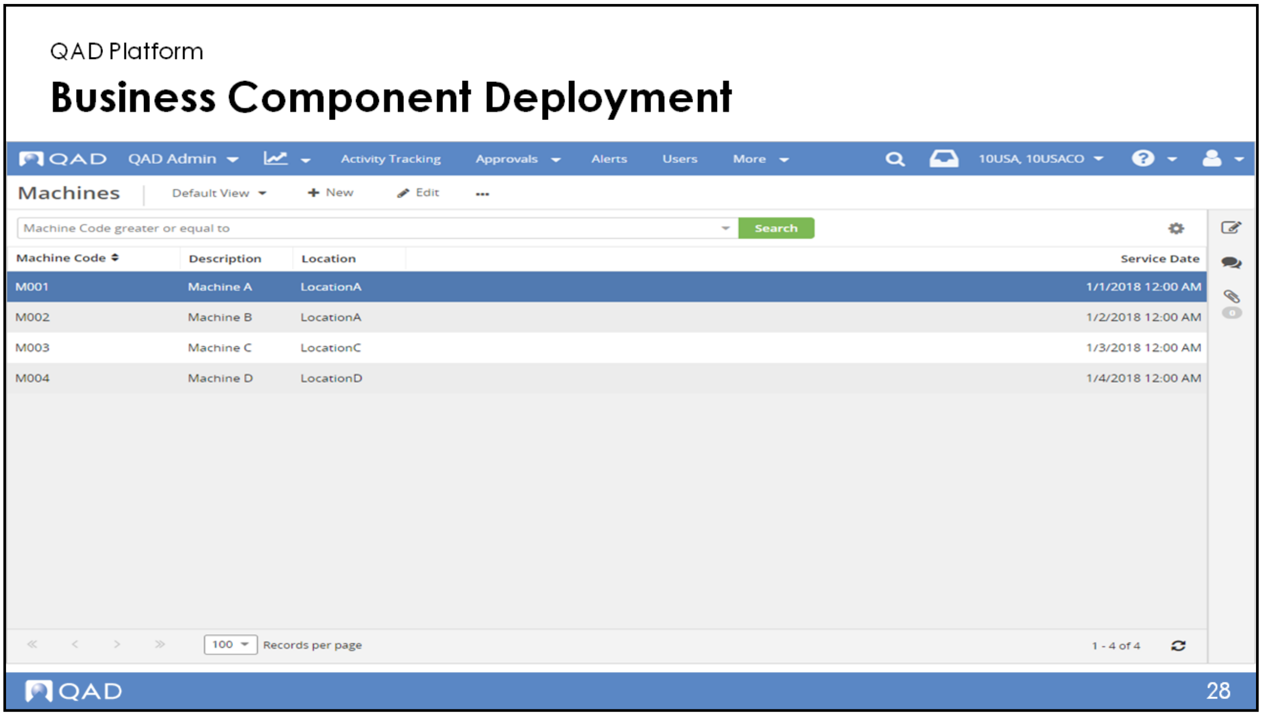
Business Component Deployment



Now this Business Component has been deployed and can be run from the menu.

You can search the Machines menu in the menu search now.

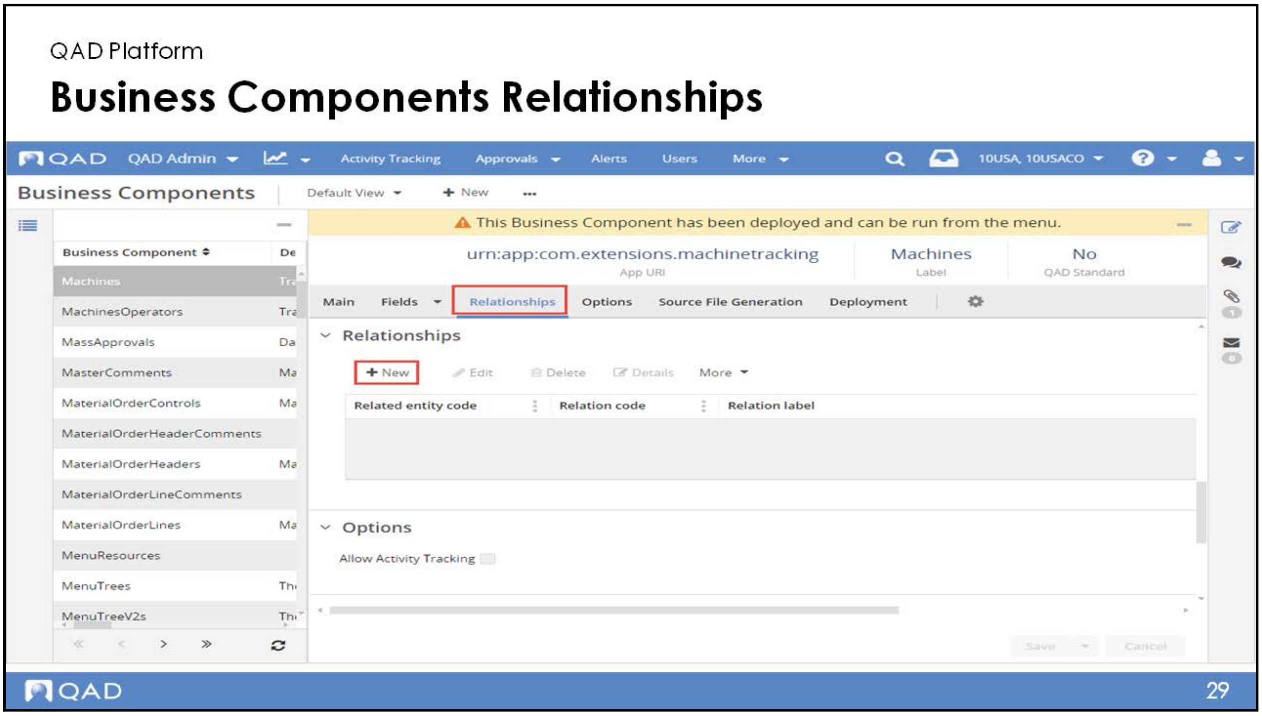
Business Component Deployment



You can view machines and machine operators information in the Web UI.

For this example, you open the Machines view and browse machines information. The initial lines are imported from the Excel file.

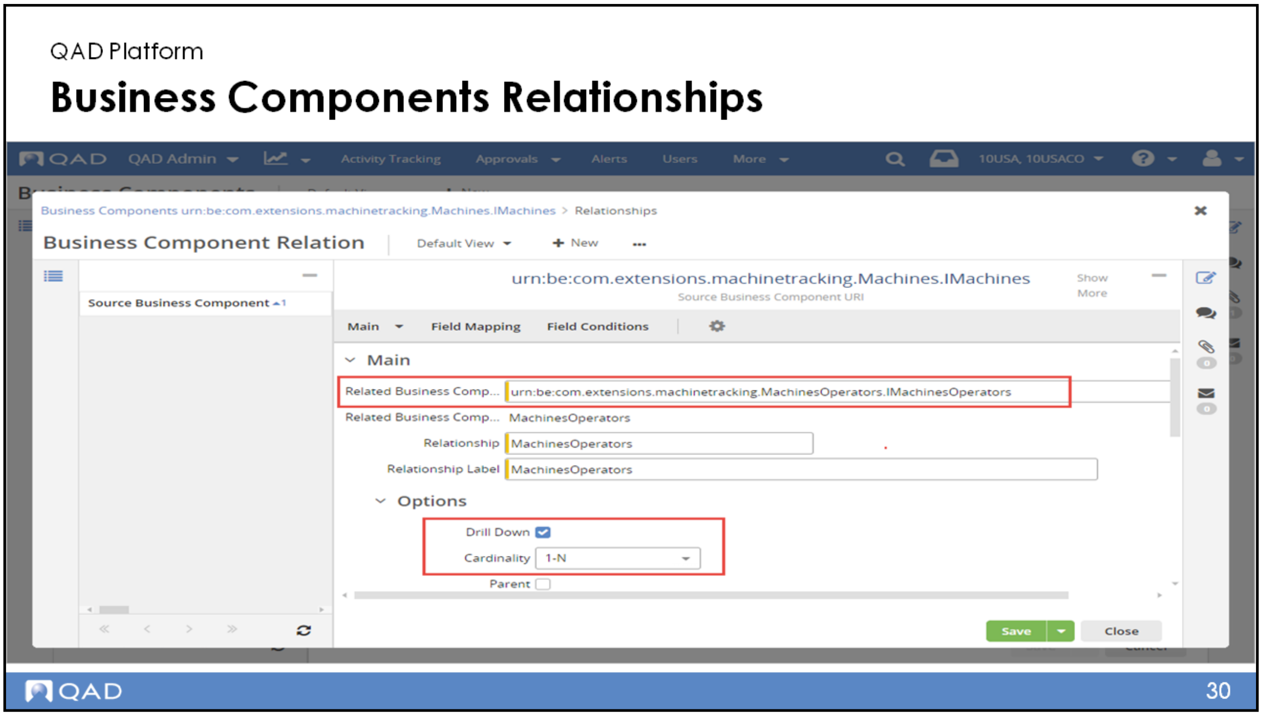
Business Components Relationships



In some cases, there is a link between Business Components. For our example, the Machine Code is a link between Machines and Machines Operators, and we call the link a relationship. You can set up the relationship in the Business Components builder.

In the Business Components form Relationships panel, click the New icon to add a new relationship between the current Business Component and another Business Component.

Business Components Relationships

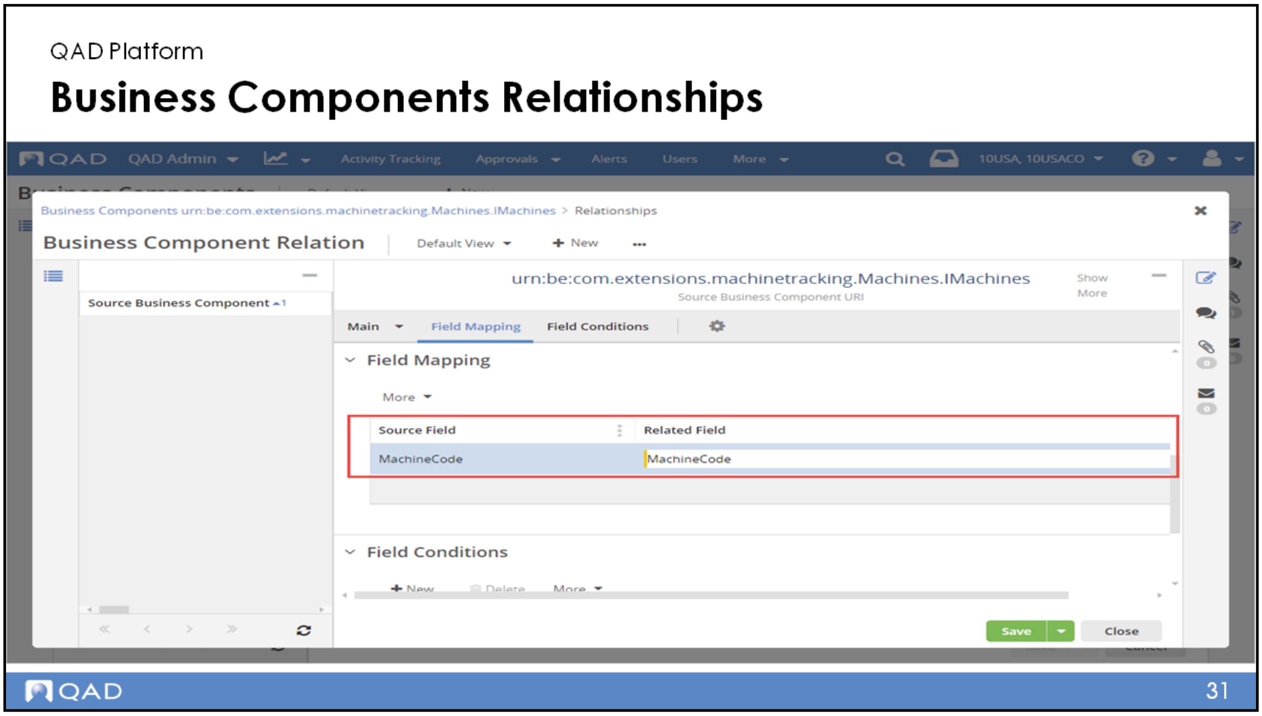


Select the related Business Component from the Related Entity URI field.

You can select Drill Down to create the related Business Component Drill-Down Links for the current Business Component.

You can choose a cardinality—either 1-1, 1-N, or N-1.

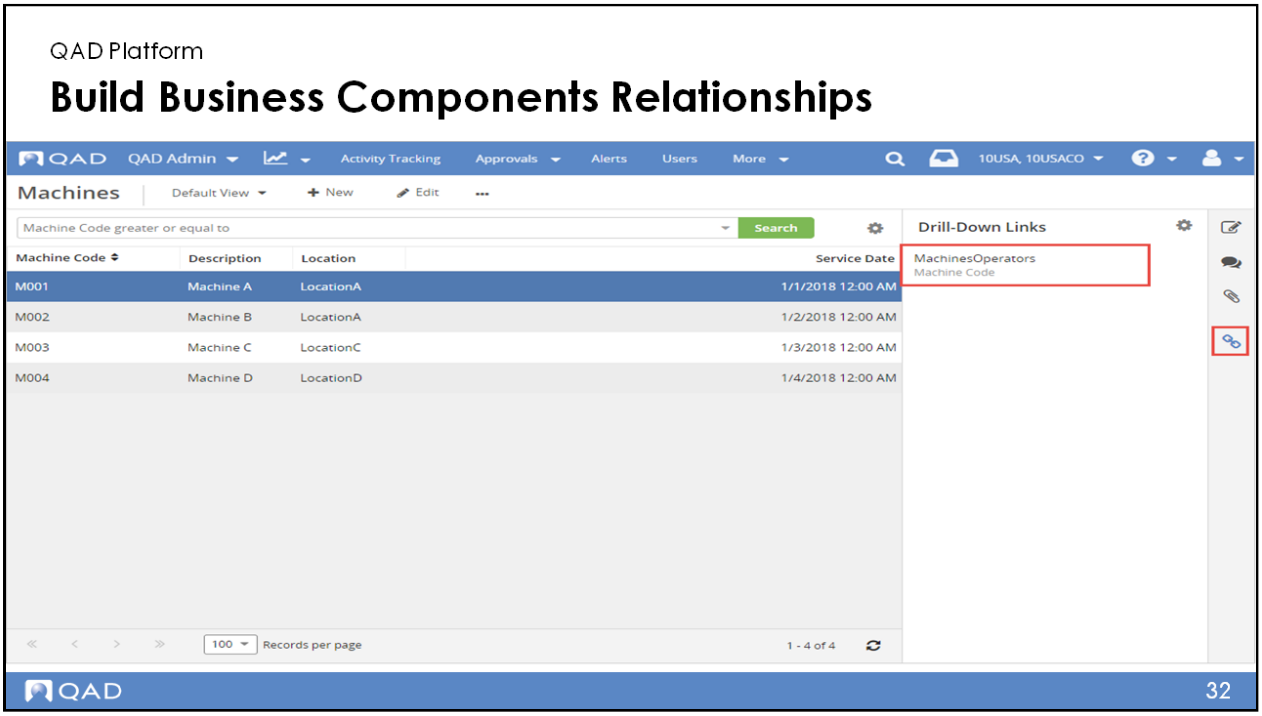
Business Components Relationships



In the Field Mapping frame, select the Related Field for the Source Field.

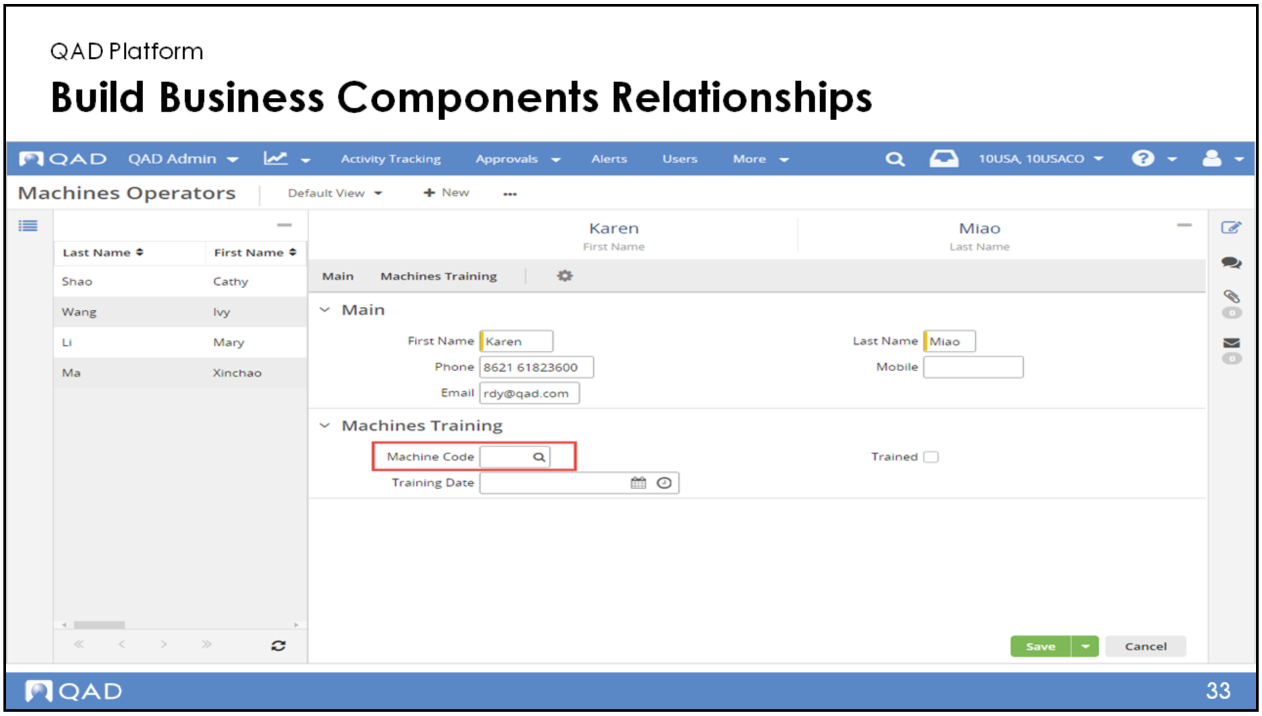
Click the Save button to save the relationships setup.

Build Business Components Relationships



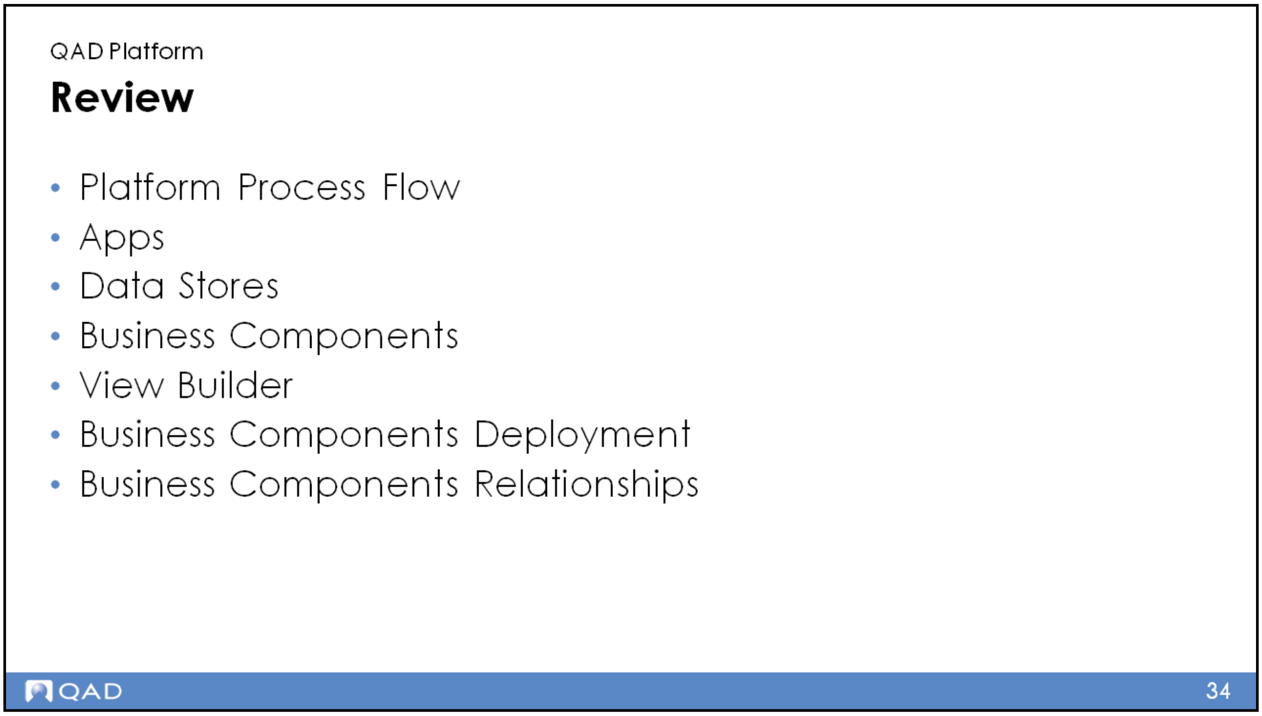
Now if you open the Machines view, you will see there is a drill-down link on the right side.

Build Business Components Relationships



Relationships also creates the look-up for the link field. For our example, you can see the Machine Code has a look-up capability in the Machines Training panel.

Review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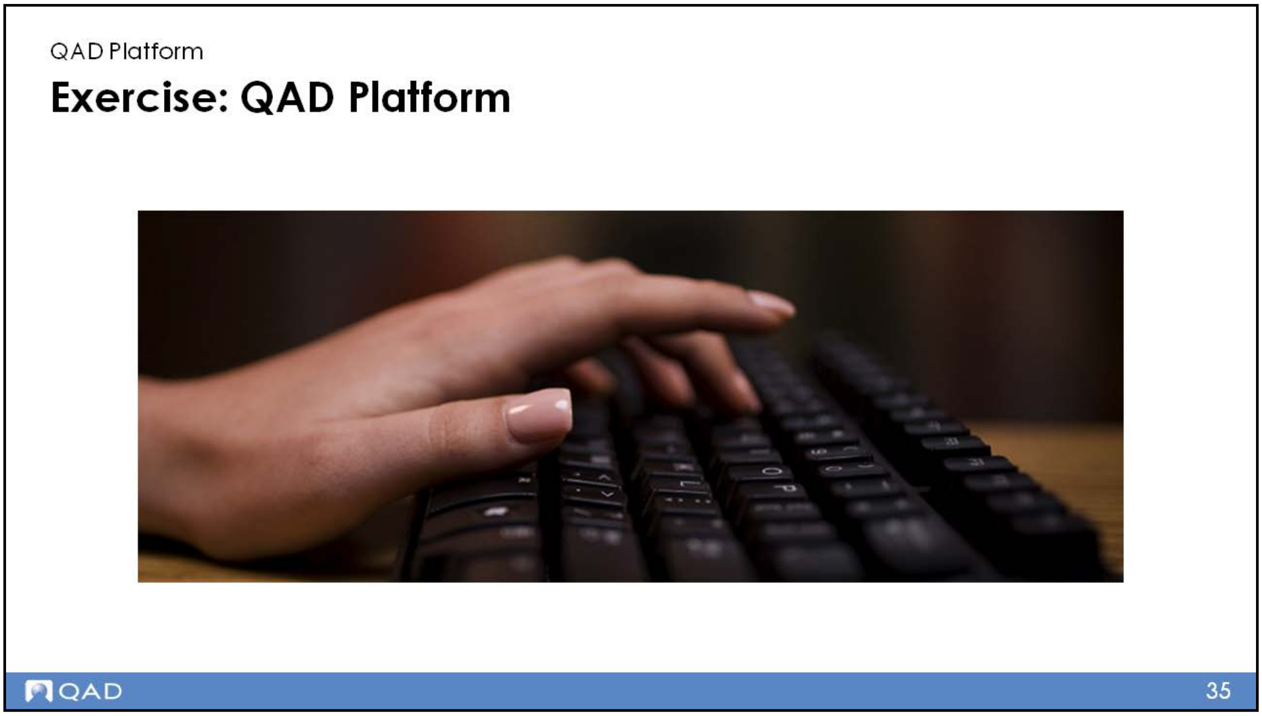
Exercise: QAD Platform



CHAPTER 10

Exercises

Exercise: UI Menu Bar

In this exercise, you will login to QAD Web UI, access Web UI menu bar items include User Role, Favorites menu selection, Action Centers, Dashboards, Role menus, Menu Search, Inbox, Workspace, Help, and User Options.

1. Sign in to QAD as user demo@qad.com. You can see your default home page: Welcome, Demo User message in the center of the screen. Click the QAD logo icon located in the upper left. You will still see the Welcome, Demo User message.

2. Select the Sales Rep from the user role drop-down list. You will see the role menus like Sales Orders, Sales Quotes, Customers, Items, More.

3. Select Purchasing Manager from the user role drop-down list. You will see the role menus change to Purchasing, Requisitions, Suppliers, More.

4. Select Purchasing Manager from the Action Centers drop-down list. You will see some system pre-defined action centers show on the screen.

5. Navigate to Purchase Orders from the menu bar. You will see the Purchase Orders view includes a toolbar along the top, a search bar, and browse lines.

6. Click the Menu Search, search for the Approval Monitor menu, and navigate to it. Click the Menu Search again, and you will see the recently searched menus.

7. Click the Inbox and check Tasks and Notifications. Click View Inbox to see the detailed messages in the Tasks or Notifications.

8. Click the Workspace and try to select a different entity. Make sure to go back to the entity 10USACO for your exercise workspace.

9. Select Online Help from the Help menu bar and you will see the online help contents on another page. If you have an open menu, the system displays the specific help for the menu. Otherwise it displays the online help menu.

10. Navigate to Purchase Orders from the menu bar. Click Set Current as Home for the User Option. Navigate to another menu like Requisitions. Click the QAD logo icon located in the upper left. Now you see your home page, Purchase Orders, displayed on the screen.

Exercise: UI Navigation

In this exercise, you will save a menu item as a favorite, create a Favorite folder, and access your favorites; create a stored search and stored view; comment on activity and add an attachment to a view; and use the drill-down links to access browse-related data.

1. Select the Purchasing Manager role and navigate to Purchase Orders. In the top toolbar, select Favorite from the ellipsis icon. Click the OK button in the pop-up frame.
2. Search the Requisitions menu and add it to Favorite.
3. Use Favorites user option and add your two favorites into a new folder named Purchasing.
4. Select Favorite from the role drop-down list. You will see the Purchasing menu bar with two drop-down menus: Purchase Orders and Requisitions.
5. Navigate to Purchase Orders. Search the supplier 10s1002 orders with status open. Save the search filters as stored search sup-10s1002. Check My Searches and you will find the new stored search.
6. Configure the Purchase Orders columns and change the columns sequence. Save the view as Myview01 for the role Purchasing Manager (PurchasingMgr). You will see the new stored view in the Role Views.
7. Edit an open purchase order. Add a comment and @ to another user.
8. Attach a Word file to the purchase order.
9. Click the Drill-Down Links; review the supplier information and check the credit terms for the purchase order.

Exercise: Setup Considerations

In this exercise, you will set up some system data, domain data, and financial data in QAD Web UI.

1. Select the Financial Controller role and navigate to SAF Concepts. Add three new SAF Concepts: employee code, employee name, employee department.
2. Navigate to SAFs and add SAF codes as in this table:

Employee Code	Employee Name	Employee Department
1001	Frank Wang	Service
1002	Mary Zhang	Sales
1003	Peter Lin	Support
1004	Cathy Li	R&D
1005	Richard Zhao	Finance

3. Navigate to SAF Structures and add a new SAF structure for Employee Info as in this table:

SAF Concept	Default SAF
Employee code	1001
Employee name	Frank Wang
Employee department	Service

4. Navigate to Commodity Codes and add a new commodity code 201860001 and link to item 60001.
5. Navigate to Employees and add a new employee code 1001.
6. Navigate to Daybook Sets and add a new AP daybook set code 10-AP.
7. Navigate to Sub-Accounts and add a new sub-account code 5501 (Sales expense).

Exercise: Security

In this exercise, you will set up a new user, and new role. Assign the domain/entity access and role membership to the user in .NET UI. Also you will set up the role permissions, user access, and menu for the role in QAD Web UI.

1. Login .NET UI as admin user. Use User Maintenance to create a new user with the following data.

User ID	Frank
User Name	Frank Wang
Email	Frank@qad.com
Email address login	Yes
Password	qad
Role	DataAdmin

2. Log in to Web UI as the demo@qad.com user and select the QAD Admin role.
3. Use Roles to add a new role DataAdmin.
4. Use Role Permissions to assign the Base Permissions to the role DataAdmin.
5. Use User Access to grant access to entity 10USACO to Frank with the role DataAdmin. Set domain 10USA as the default domain.
6. Use Menus to add a new menu bar Base Data for the role DataAdmin. Add menu items Sites, Locations, and Items in the folder.

Exercise: Base

In this exercise, you will set up Sites, Locations, UM Conversions, Item Status Codes, Product Lines, Items, Customers, and Suppliers in QAD Web UI.

1. Log in to WEB UI as demo@qad.com user. Use Sites to create a new site code 10-110 for airbag.
2. Use Locations to create a new location code 015 for trade goods.
3. Use UM Conversions to define 100 EA equal one PL.
4. Use Item Status Codes to create a new item status code Design.
5. Use Product Lines to add a new product line 15 for trade goods.
6. Use Items to add a new item master for airbag cushion. The item number is 61001 and product line is trade goods. The default site/location are 10-110/015.
7. Use Customers to add a new customer Metrologic; the code is 10c1007.
8. Use Suppliers to add a new supplier Renolit; the code is 10s1007.

Exercise: Administration

In this exercise, you will set up Activity Tracking, User Configuration, Alerts, and Managing Approval in QAD Web UI.

1. Log in to Web UI as demo@qad.com user. Use Activity Tracking to set up tracking for the Action Status field in the Business Component SalesOrderHeaders.
2. Navigate to Sales Orders. Edit a sales order and change the Action Status to CH. You will see a new activity record for the sales order in the Activity panel.
3. Click User option and change your language and format locale. Change your notification category setting or event setting.
4. Use Alerts to set up a status change alert for sales order header's action status. The alert is sent to user demo.
5. Navigate to Sales Orders. Edit a sales order and change the Action Status to CH. You will see a status change notification in your Inbox.
6. Use Approval Configuration to enable Purchase Order approval. Enable authentication required and early approval.
7. Use Approval Routes to add a new route named PO route and select the Purchase Order as the Business Component and USD as the currency. Add two approvers: first demo, and second VPPur.

Exercise: Action Centers

In this exercise, you will set up a new Action Center in QAD Web UI.

1. Log in to Web UI as demo@qad.com user. Use Action Centers to add a new action center New Inventory Manager.
2. Add three inventory value Visuals from Gallery: Inventory Value by ABC Code, Inventory Value by Product Line, and Inventory Value by Type to the New Inventory Manager.
3. Rename the tab to Inventory Value.
4. Change the Number of Panel Column to 2. Move the Inventory Value by Type visual to the upper right.

Exercise: QAD Platform

In this exercise, you will create new Apps, define Data Stores, create Business Components, build Views, deploy Business Components, and set up Business Components Relationships in QAD Web UI.

1. Log in to Web UI as demo@qad.com user. Use Apps to add a new App Machine Tracking as system default.
2. Use Data Stores to review existing created data store records. Add a new data store testdb and use the same database from the created data store record.
3. Use Business Components to add a new Business Component Machines with the following fields:

Field Name	Data Type	Form	Primary Key
Machine Code	Character	X(8)	1
Description	Character	X(20)	
Location	Character	X(8)	
Service Date	Datetime		
Domain Code	Character	X(8)	

4. Use View Builder to build Form, create Main panel, and add Hybrid View for the Business Component Machines.
5. Use Business Components to do the deployment for the Business Component Machines in the data store testdb.
6. Search menu Machines and enter several machines records.
7. Repeat steps 3 through 6 to create another Business Component Machine Operators with the following fields:

Field Name	Data Type	Form	Primary Key
Employee	Character	X(20)	
First Name	Character	X(10)	1
Last Name	Character	X(10)	2
Machine Code	Character	X(8)	
Trained	Logical	Yes/No	
Training Date	Datetime	99/99/99	
Email	Character	X(20)	
Office Phone	Character	X(15)	
Mobile Phone	Character	X(15)	

8. Use Business Components to add a relationship between Machines and Machine Operators. One machine may have one or multiple operators. Enable the drill-down in Machines.

9. Navigate to Machines again and you can see the Machine Operators drill-down links.
10. Navigate to Machine Operators again and you can look up machines by the Machine Code field.