



# Administration Guide **QAD Planning and Scheduling Workbenches**

Introduction  
Workbench Processes  
System Load and Performance  
Configure

70-3174-2013EE  
QAD Enterprise Applications 2013  
Enterprise Edition  
March 2013

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**QAD Inc.**

100 Innovation Place  
Santa Barbara, California 93108  
Phone (805) 566-6000  
<http://www.qad.com>

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# Change Summary

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

<b>Date/Version</b>	<b>Description</b>	<b>Reference</b>
March 2013 EE	Rebranded for March 2013 EE	--
	Updated prerequisites for PCs that run the workbenches	page 13
December 2012.1 EE Revision	Added new CAC browse collection customization information	page 27
September 2012.1EE	Rebranded for 2012.1 EE	--
March 2012 EE	Rebranded for QAD 2012 EE	--
September 2011/2011.1 EE	Rebranded for QAD 2011.1 EE	--



# Introduction

This chapter introduces Planning and Scheduling Workbenches and its administration functions.

## **Overview 2**

Introduces basic components of the QAD Planning and Scheduling Workbenches and introduces the data presented within this administration guide.

## **MSW and PSW License 3**

Provides information on obtaining and registering the Maintenance license, needed to access MSW and PSW.

## **Conversion for Planning and Scheduling Workbenches 4**

Provides information on conversion programs that automatically run when you update or retrofit versions.

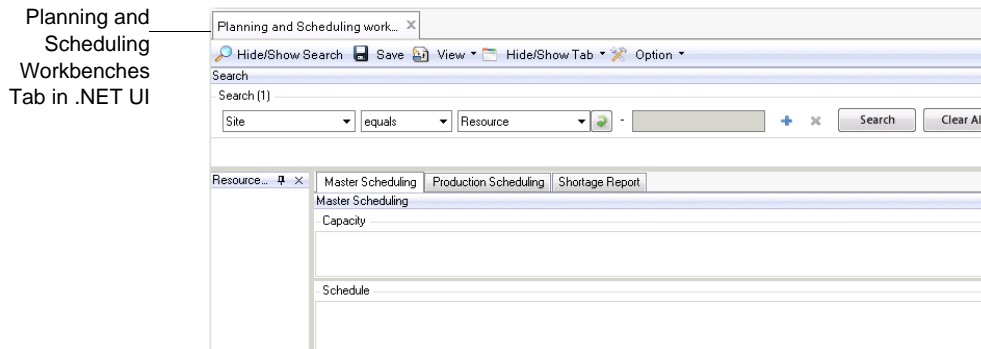
**Important** Because the Planning and Scheduling Workbenches are powerful tools that summarize all your demand, supply, and capacity information across your planning/scheduling horizon, you need to allocate one processor (core) per three production planners/schedulers to prevent performance degradation.

## Overview

The QAD Planning and Scheduling Workbenches are .NET UI-only scheduling tools that run in the QAD Enterprise Edition. The tool lets you effectively plan and schedule resources for a master schedule or a production schedule from a single workbench for each type of schedule.

You run the workbenches from the .NET UI's list of applications. The .NET UI tab indicates the Planning and Scheduling Workbenches; see Figure 1.1.

**Fig. 1.1**  
QAD Planning and Scheduling Workbenches



Once you access the workbench, you can use the following functions and features:

- Master Scheduling Workbench (MSW)
- Production Scheduling Workbench (PSW)
- Integrated component check capabilities
- Several QAD EE programs and browses that provide supporting information
- The flexibility to modify and configure virtually every aspect of the UI to reflect the needs of each application user in your organization

This document focuses on topics of interest to system administrators who troubleshoot issues or problems, analyze behavior, interact with the components or processes, or customize the workbenches. Topics within this guide include discussions on:

- How the workbenches work and background processing
- System load and performance and troubleshooting information
- Data dimensions
- XML that builds the UI
- UI customization

The following topics briefly discuss each major component; for more information, see *User Guide: Planning and Scheduling Workbenches*.

## Master Scheduling Workbench (MSW)

The MSW increases master scheduling efficiency by letting you simulate and commit scheduling changes, factoring demand, supply, inventory, production orders, and MRP data from several QAD EE programs in a single workbench.

**Note** Production orders are all orders associated with production—production lines, work centers, or other production areas—including discrete orders, repetitive orders, scheduled orders, cumulative orders, and so on.

You can use the MSW to interact with production line and work center schedules and make changes where necessary. Within MSW, you can update the production order status, as well as release, create, or close production orders, while considering all supply, demand, and capacity sources from the single workbench. You can also identify items with demand issues and check component availability for each production order to be released.

User-configurable parameters control the number of days that you are in control of the schedule as opposed to MRP control. You can also set the number of future and historical days to which you want visibility to your production data in the MSW.

Event-based color coding lets you easily identify areas of concern. You can review and manipulate schedule and production order data. Once satisfied, saving your schedule creates firm repetitive production schedules or revised and new production orders in QAD EE applications.

## Production Scheduling Workbench (PSW)

Once you generate a master production schedule over a daily, weekly, or monthly horizon, you may need to create a production schedule for a shorter, two-to-five day period for the shop floor to drive shop floor execution. The production scheduling goal is to optimize shop floor efficiency by scheduling and sequencing production orders that have like attributes together, reducing machine setups and maximizing labor utilization.

Some companies run a single production order over several days, while others run multiple production orders within a single day. Further, some companies define a production sequence/priority by shift to monitor shift performance or to ensure that products are available for a specific shipment time. The PSW lets you schedule discrete and repetitive items on production lines. You can schedule, sequencing items within a day and shift.

## MSW and PSW License

Like Operational Metrics, MSW and PSW require an active Maintenance license before you can access them. You obtain the Maintenance license key through the following Web site:

[https://support.qad.com/license\\_keys/activemaintenance/](https://support.qad.com/license_keys/activemaintenance/)

In the Web URL, click the Generate License Key button to generate a license key, then follow the prompts to generate the license key. Once you select the Accept key, the system generates the key, displaying it on the Web URL screen, and e-mails the license key to you.

**Note** The Support Web site requires your Support login information.

Once you obtain the license key, you must register the Maintenance license with the system through License Registration (36.16.10.1).

If you attempt to run either the MSW or PSW and you do not have an active Maintenance license, the system displays an error message. The system displays a warning if the active Maintenance license is close to the license expiration date. Refer to *User Guide: QAD Security and Controls* for information on registering the license key in QAD EE. Refer to the *QAD .NET User Interface 2.8.1 Release Notes* for information on Operational Metrics Licensing.

## Conversion for Planning and Scheduling Workbenches

A conversion program for the workbenches automatically installs and runs during the standard QAD EE upgrade process. There is no user interaction required for the conversion program.

The program examines existing production line/item detail (Ind\_det) records and sets the Run Crew Size field to 1 (one) if it is currently 0 (zero). When you enable the Run Crew Size field for the workbenches calculations, the system requires that the value of Run Crew Size be set to 1 to avoid issues that can arise when the system encounters a 0 in the field and attempts to divide by 0 in workbench calculations.

For information on other update programs that mass update existing data for use with the workbenches, refer to *User Guide: Planning and Scheduling Workbenches*.

## Oracle and the Workbenches

If you use Oracle with the workbenches, note that QAD does not provide standard support for customers who use standard Oracle products. To ensure proper Oracle-workbenches processing and functionality, you should submit a request to QAD for an Oracle-compliant version.

# Workbench Processes

This chapter tells you how the system works and explains background processing.

## ***Introduction*** 6

Introduces concepts and terms that describe the Planning and Scheduling Workbenches in terms of its relationship to the AppShell.

## ***Basic Processes*** 6

Explains the four basic workbench processes, include search, modify, create new, and save processes.

## Introduction

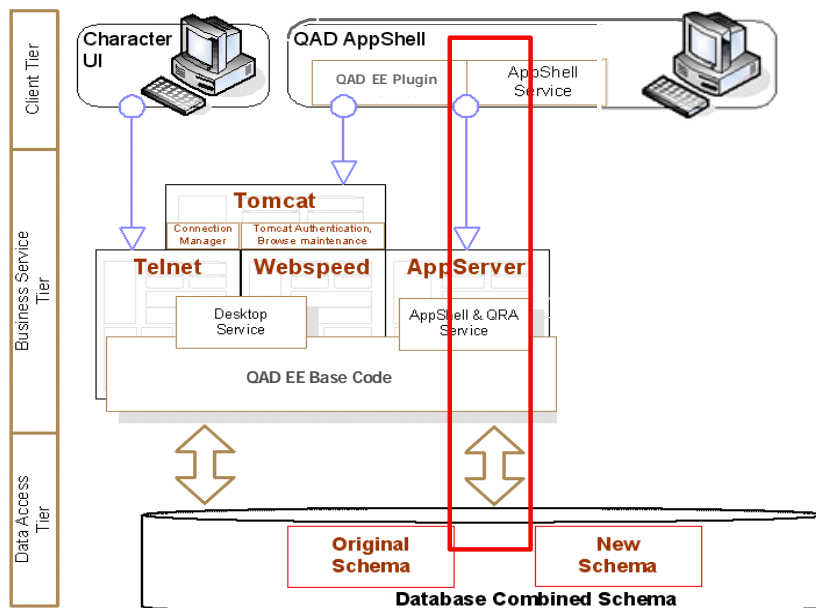
The Planning and Scheduling Workbenches, which includes two separate workbenches (MSW and PSW), a Shortage Report, several supporting browses and programs, and various frames that let you navigate resources, search, display capacity, and so on, is a plugin that runs inside the client; that is, it runs in the AppShell on the user's computer. The client connects with the database and business logic at the backend, or the *server*.

A *plugin* is a computer program that interacts with a host application (a Web browser or an e-mail client, for example) to provide a certain, usually very specific, function.

Schedulers create and maintain schedules in the workbenches, but they can also view how schedule changes impact the production line or work center load, supply and demand, and material availability. They also have simulation capabilities in the workbench. Typically, there is no impact on the database until the user commits by saving the data.

The following graphic depicts client-server interactions. The red line indicates the area of interest for MSW/PSW.

**Fig. 2.1**  
Client-Server Interactions



## Basic Processes

To understand what happens when users interact with the Planning and Scheduling Workbenches, the following topics present four common user processes:

- Search
- Modify
- Create new
- Save

These four processes typically constitute the basic processes performed in most applications. All of the processes, except modification, involve the client interacting with the server to access databases and run business logic.

## Search Process

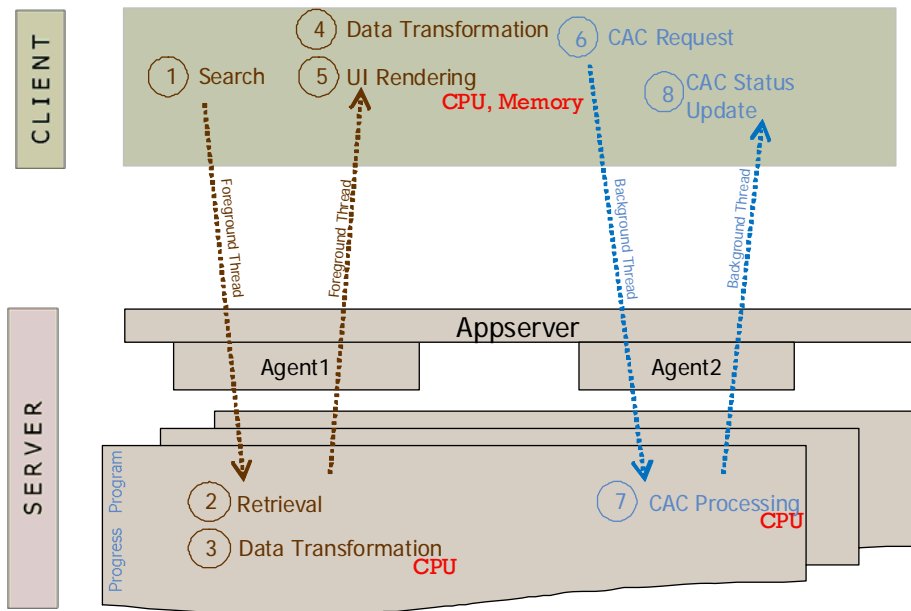
The following occurs when the user performs a search in the workbench:

- 1 The client sends search criteria to the program, running on the Progress appserver.
- 2 The program executes a search against the database.
- 3 The program transforms data into a format that the client needs.
- 4 The client receives data from the program and further transforms it.
- 5 The client loads data into memory, which, in turn, loads data on the screen.
- 6 The client initiates a background thread to compute component availability check (CAC) statuses. The background thread calls the CAC computation program on the server.

**Note** A thread is a flow of control within a program, such as Java or C#, and is either a background or foreground thread. Background threads are similar to foreground threads except that they do not keep the managed execution environment running. So, when the last foreground thread stops, then all background threads stop, and the process stops.

- 7 The program computes statuses and returns them to the client.
- 8 The client loads statuses into memory, which, in turn, loads them on the screen.

**Fig. 2.2**  
Search Process



## Modify Process

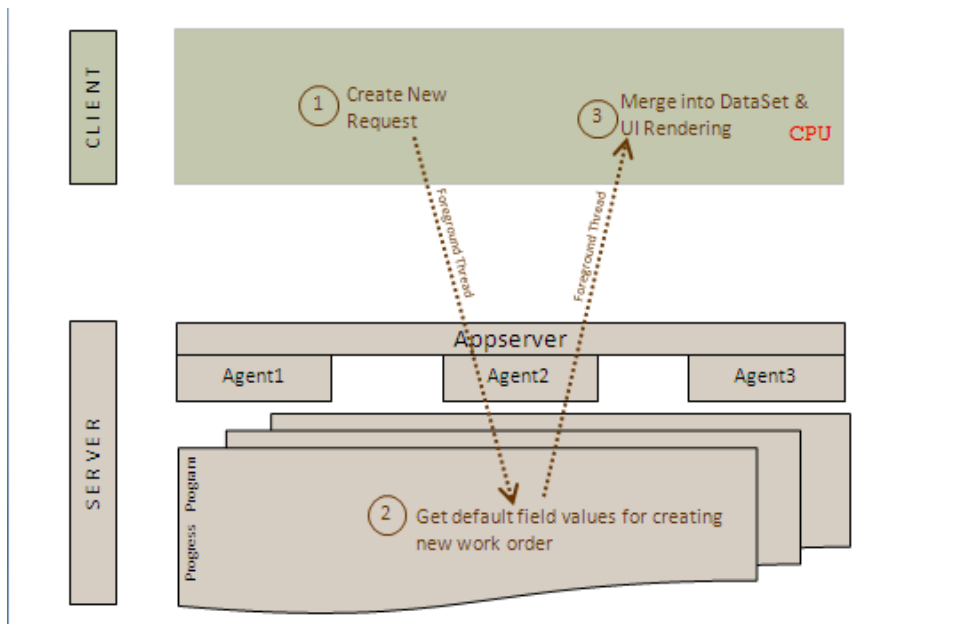
When the user modifies a production order, the client modifies data in memory. There is no client-server interaction, however.

## Create New Process

When the user creates a new production order:

- 1 The client calls the program that runs on the Progress appserver.
- 2 The program makes a copy of the new production order, discards the production order created, but returns a copy.
- 3 The client loads the copy of the new production order into memory which, in turn, loads it on the screen.

**Fig. 2.3**  
Create New Process



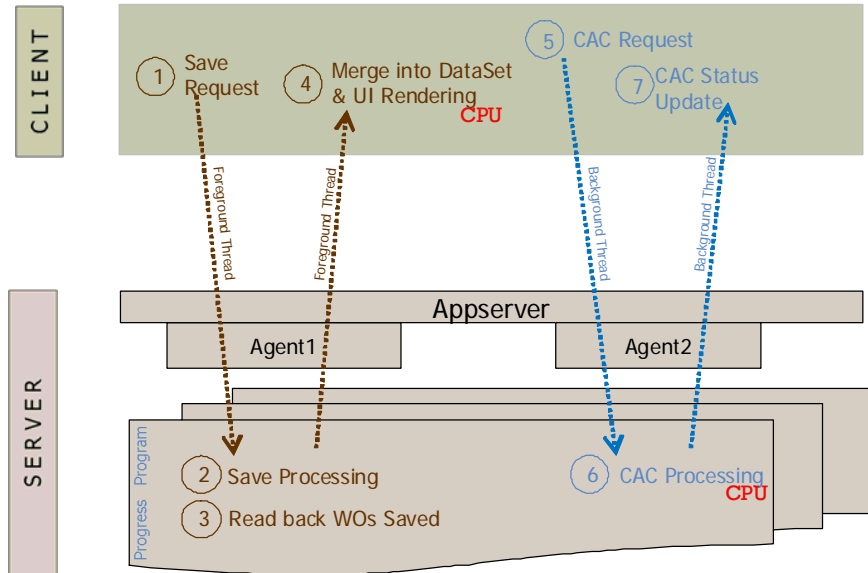
## Save Process

When users save data in the workbenches, the following occurs:

- 1 The client sends new/updated production orders to the program running on the Progress appserver.
- 2 The program saves the production orders after they have been validated.
- 3 The program reads back saved production orders.
- 4 The client reloads saved production orders into memory that it displays on the screen.
- 5 The client initiates a background thread to compute CAC statuses.  
The background thread calls the CAC computation program on the server.

- 6 The program computes statuses and returns the statuses to the client.
- 7 The client loads statuses into memory which, in turn, loads them on the screen.

**Fig. 2.4**  
Save Process



As noted in the images, some steps demand significant CPU and/or memory resources. These steps largely decide the application response times. Chapter 4, “Configure,” discusses the parameters that affect system load. The key to getting better performance is to affect the system load and help these resource-intensive steps go faster.

Each request from the client results in the system running a Progress program on one of the appserver agents that is not busy. Until the processing for that request is complete, the agent is busy. Concurrent incoming requests are handled by one of the appserver agents that is available. In other words, concurrently running clients share a pool of appserver agents. It is important to ensure there are a sufficient number of agents in the pool to service all concurrent clients. Having insufficient agents results in incoming requests being queued, which adversely affects response times.

Steps that are resource intensive on the server are likely to keep the appserver agent busy longer. As the number of workbench users grows, it is important to monitor appserver agent usage and if necessary, to increase the agent pool size by configuring the appserver.



# System Load and Performance

This chapter describes system load and performance issues.

***Introduction*** 12

Discusses topics introduced in this chapter on load and performance.

***System Load*** 12

Explains the dimensions that impact the system load.

***User Preferences Impact*** 13

Discusses the impact of certain MSW or PSW preferences on system performance.

***System Configuration*** 13

Explains how system performance is affected by system configuration, both hardware and software.

***Log Files*** 15

Explains how you can examine log files to analyze record retrieval time per user, then recommends methods to improve the time.

## Introduction

The Planning and Scheduling Workbenches let schedulers simulate results. They can see the results of their updates and modifications before they commit this data to the database. The simulations on the schedule changes, however, can require that the system read and load a great deal of data from the database into system memory.

The system load comes from these elements:

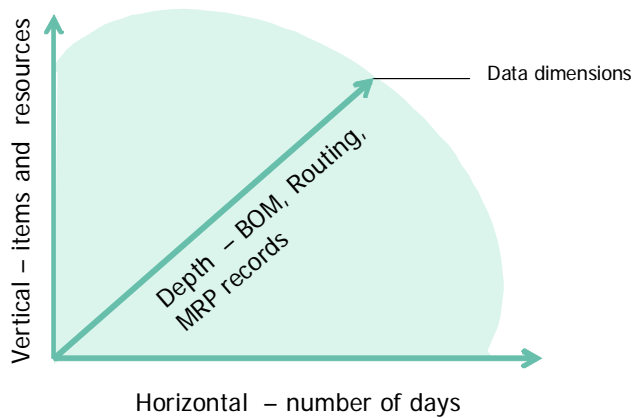
- Amount of data
- User preference parameters
- System configuration

## System Load

System load comes in the following three dimensions:

- Item and resources
- Scheduling horizon days
- The number of MRP details; that is, production order records, component records (BOM), routing records, and so on

**Fig. 3.1**  
System Load



Load on the client and server increases as any of dimensions increase, impacting system response time and, hence, performance.

Search criteria and user preference settings impact the three dimensions, too, as shown in the following table, which presents the performance impact by order of impact.

**Table 3.1**  
Performance Impact by Order of Impact

Impact (1=Highest)	Area	Impact
1	Search criteria	This is the most significant impact, affecting the number of item/resources and therefore, indirectly the number of production orders, components, and routings.
2	Scheduling horizon	The horizon affects the number of production orders, components, and routings. After search criteria, this is the most significant parameter that affects performance.
3	Other user preferences	Setting other user preferences can impact performance; see “User Preferences Impact” on page 13.

## User Preferences Impact

Use the data in Table 3.2 to determine whether a user preference can be disabled to improve performance. For example, if you disable CAC, you can improve performance when retrieving and saving data.

**Table 3.2**  
User Preference Impact

Search/User Preference	Impact
Enable CAC	When enabled, the system computes component availability statuses during both search and save operations. This is a processor-intensive computation that can add a significant load on the server.  <b>Important</b> If you do not need CAC functions, you should disable this feature as it can make a significant difference in performance.
Process Operation Details	Disabling this function prevents the search from transferring routing records to the client. Not having routing records on the client removes the required additional processing the system needs to keep routings updated. Users who schedule for production lines only should use this function.
Display Search Progress	When searching, this option makes the client divide the entire search into smaller groups. It also causes a progress bar to display as it processes each group. A processing overhead is associated with dividing the search into smaller groups. If the search takes too long, you should try disabling this feature.
CAC Horizon	The CAC horizon determines the number of days for which the system computes CAC status. This affects the number of MRP detail records that the server processes and sends to the client.

## System Configuration

System performance is affected by system configuration, both hardware and software, as follows:

- Client PC

Processor speed and amount of memory have a very significant impact on response times. Chapter 2, “Workbench Processes,” discusses the common processes that demand significant memory and processor resources. Internal performance tests reveal that using PCs with older processors can result in less-than-optimal performance. So, it is important to have a client PC with a processor that has at least a 2 GHz dual-core CPU and at least 2 GB of RAM.

- **Server machine**

Chapter 2, “Workbench Processes,” discusses a number of common processes that demand significant processor resources on the server machine. For this reason, it is important that the server machine has enough spare processing capacity to handle the load.

- **Network**

All processes involving client-server interaction are affected by network speed; however, during data retrieval, the system transfers significant amounts of data from the server machine to the client over the network. System administrators should look for poor response times caused by network latency.

- **Software configuration**

Progress administrators should ensure that there are a sufficient number of agents to service all concurrent QAD AppShell users; otherwise, the system can queue appserver requests from the client, resulting in poor response times.

## Troubleshooting Performance

Although there is no single tool that lets you measure the application’s response times, system throughput, and system stress levels, you can improve performance by increasing processors (cores) and curtailing the use of some user preferences to improve performance. You can view log files to aid in troubleshooting performance.

### Increasing Processors

The Planning and Scheduling Workbenches provide schedulers/planners visibility into future supply and demand, projected shortages, projected capacity overloads/underloads, and projected component shortages—allowing schedulers/planners to make faster, more informed, and more efficient decisions.

To provide the data, the workbenches process and summarize large amounts of transactional data. The processing required depends on the volume of transactional data for the query parameters that schedulers/planners specify. When the processing involved is large, it can add a significant load on the server machine during the processing period. Users of other applications that run on that server machine may experience a degradation in response time during those periods.

Since every environment is different, the effect of the additional load on server machine users is unpredictable. The effect depends upon the:

- Server machine’s spare processing capacity
- Scope of query
- Database transactional data volume

To address the slower response time other users may experience during workbench processing, QAD recommends augmenting the server's processing capacity by adding an additional processor (core) for each concurrent scheduler.

## User Preference Settings

The query-selection process, which lets you specify the sites, resources, and resource types, combined with the number of history and future days you specify, results in searches that can take from seconds to minutes.

It is important that all workbenches users properly define the query selection and correctly set the historical and future days of data to retrieve. Performing a search for all resources across sites or all resources within a site is strongly discouraged. Users should try to use Scheduler ID as a minimum, not just site ID, to improve search retrieval time.

There are also user preference settings defined that let the system perform data retrievals in a single request as opposed to an incremental request method; the latter method could require 20 to 30 percent more processing load over the single request method. Material on performing searches is available in segments on Getting Familiar with MSW and PSW within the Planning and Scheduling Training Guide and videos. For information on setting user preferences, refer to *User Guide: Planning and Scheduling Workbenches*.

## Log Files

You can examine the system log files to determine what took place in the system and how long it took. When users make requests to the back-end processor, or server, the system tracks the request in the appserver log file as well as in the client log file.

The client log file is on the user PC and only contains log messages pertaining to that user's activity. The appserver log file, on the other hand, is shared by all users. So it contains log messages pertaining to activity of all users.

**Note** For additional information on reading log files, refer to the following link:

<http://tracker.qad.com/confluence/display/QDN/Planning+and+Scheduling+Workbenches+Support>

To effectively troubleshoot an issue, you should be able to associate a client request with a server response. Since the server log is for all clients, associating client requests with server response can be very difficult. To facilitate this association, both log files show Call ID and Proxy Caller ID. In addition, all messages are prefixed with the words MSW/PSW.

**Fig. 3.2.**  
Appserver Log File, Proxy Caller

```
[10/07/28@15:51:16.363-0700] P-022464 T-000000 1 AS -- (Procedure: 'loggerMilestoneStart us/wo/woscdisp.p' Line:1
335) MSW/PSW --- Starting Proxy call. [Call: 12b53f73-aac5-4b95-aaf2-8846326434b8] Proxy Caller: 65414391
[10/07/28@15:51:16.383-0700] P-022464 T-000000 1 AS -- (Procedure: 'loggerMilestoneStart us/wo/woscrtrv.p' Line:1
395) MSW/PSW --- Starting Data retrieve
[10/07/28@15:51:16.396-0700] P-022464 T-000000 1 AS -- (Procedure: 'loggerStepStop us/wo/woscrtrv.p' Line:1437) M
SW/PSW --- Done Loading small tables Elapsed: 10ms
[10/07/28@15:51:16.397-0700] P-022464 T-000000 1 AS -- (Procedure: 'loggerStepStop us/wo/woscrtrv.p' Line:1437) M
SW/PSW --- Done Loading ttResourceMaster Elapsed: 0ms Count: 0
[10/07/28@15:51:16.397-0700] P-022464 T-000000 1 AS -- (Procedure: 'loggerStepStop us/wo/woscrtrv.p' Line:1437) M
SW/PSW --- Done Loading ttResourceMaster Elapsed: 0ms
[10/07/28@15:51:16.398-0700] P-022464 T-000000 1 AS -- (Procedure: 'loggerStepStop us/wo/woscrtrv.p' Line:1437) M
SW/PSW --- Done Loading loadATP Elapsed: 1ms Item Site
Count: 0
[10/07/28@15:51:16.399-0700] P-022464 T-000000 1 AS -- (Procedure: 'loggerStepStop us/wo/woscrtrv.p' Line:1437) M
SW/PSW --- Done Loading ttSupplyDemand record Elapsed: 0ms Item Site Count: 0
[10/07/28@15:51:16.407-0700] P-022464 T-000000 1 AS -- (Procedure: 'loggerStepStop us/wo/woscrtrv.p' Line:1437) M
```

In the log file, you can determine when a user starts data retrieval as the log file depicts the start and finish of the data retrieval in milliseconds. The information can help you determine exactly how many records were retrieved, the type of record, how long the retrieval took, which user retrieved the records, and so on.

Knowing this can help you curtail long user retrievals. When retrieval issues arise, you can help users resolve the issues by successfully employing the MSW/PSW search filters or disabling functions through the user preferences.

You can find the client log file in .NET UI. At the top menu, select Help, then About, then View Log. If you operate on the appserver side, the system displays the appserver log file; if you operate on the client side, the system displays the client log file.

Each MSW or PSW request is preceded by the word MSW or PSW; see figure Figure 3.3.

**Fig. 3.3.**  
Client Log File

```

2010-07-14 14:28:51. INFO. [151].
QAD.Plugin.PlanningScheduling.DataSelectionControl.BrowseModel_BeforeBrowseSubait(20).
MSW/PSW - Executing Search: prs_site Equals babl
prs_resourceType Equals 0

2010-07-14 14:28:51. INFO. [207].
QAD.Plugin.PlanningScheduling.DataSelectionControl.BrowseModel_BrowseDataChanged(1). MSW/PSW
- Done First Pass Retrieval. Elapsed: 359

2010-07-14 14:28:51. INFO. [135].
QAD.Plugin.PlanningScheduling.SchedulerProxyCaller.RetrieveData(5). MSW/PSW - Start Second
pass retrieval with proxy parameters: programToRun --> voscrtrv.p
todaysDate --> 2010/07/14
startDate --> 2010/07/09
endDate --> 2010/10/12
RetrieveRoutingRecords --> False
sequencingHorizon --> 10
proxyCallerID --> 33570340
callID --> 75c6b966-e3fe-4424-baba-05f2401ccd4f
< .. other search parameters ..>
    
```

The following graphic shows that the first pass of the data retrieval on the server took 259 milliseconds.

**Fig. 3.4.**  
Appserver Log File, Timing

```

ringScheduling.DataRetrievalBackgroundWorker.OnDowork(5), MSW/PSW - Done Retrieving Chunk 0. El
benchServices.Logging.Logger.StepStop(1), MSW/PSW - Done Second pass retrieval. Elapsed 984 ms
ringScheduling.DataSelectionControl.BrowseModel_BrowseDataChanged(1), MSW/PSW - DataSet returned
:-wo_mstr - 2, tt-wr_route - 0, ttSupplyDemandType - 12,
ourceType - 1, ttCapacityType - 5, ttworkOrderStatusType - 7,
erOrderType - 2, ttResourceDateDetail - 0, ttDateShiftDetail - 0,
:- 2, ttmrp_det - 0, ttmsll_mstr - 0,

benchServices.Logging.Logger.StepStop(1), MSW/PSW - Done Data Transformation. Elapsed 46 ms
benchServices.Logging.Logger.StepStop(1), MSW/PSW - Done Fire DataAvailable. Elapsed 3234 ms
ntroller.PluginContainer_UserLogoff(1), Logoff user mfg
ntainer.get_Internal(1),
    
```

MSW/PSW Data done retrieving.

Second retrieval pass took 984 milliseconds.

If you work on the client, the system retains a client log file that uses the same format and keeps track of the same events and requests that the appserver log file tracks.

## Additional Files

The `/Application Data` folder of the client machine contains files for each plugin. Inside the `/plugin` folder is a `layout` folder that contains a list of XML files. The files are the views that Windows saves for the user as set in the View option. Note that the system saves views for Windows, not QAD SE users. That is, the system provides a capability that allows the layout to be saved to files; so, the XML files depend upon the view you have saved.

You can clear out all Application Data files for an AppShell installation; however, doing so would affect all data related to all plugins. So, if you choose to clear Application Data files, it clears all of previously mentioned files for MSW/PSW.

In addition, in the Application Data plugin folder, the following files exist:

- `Browsesearchconditions.xml`
- `Preferences.xml`

`Browsesearchconditions.xml` saves the last search that was performed by that Windows user. `Preferences.xml` contains the preferences saved by that Windows user.



# Configure

This chapter discusses the following configuration information:

**Overview 20**

Describes the chapter contents.

**ControlConfig.XML File 21**

Describes the layout and location of the `ControlConfig.XML` file, including several examples of code from the file.

**Adding Browsers to the Workbench 24**

Provides an example and procedures to add a new browse to the workbench by altering data in `ControlConfig.XML`.

## Overview

This section describes how the plugin is internally configured. It describes the layout and location of the configuration XML file. It also provides an example and procedures to add a new browse to the workbench.

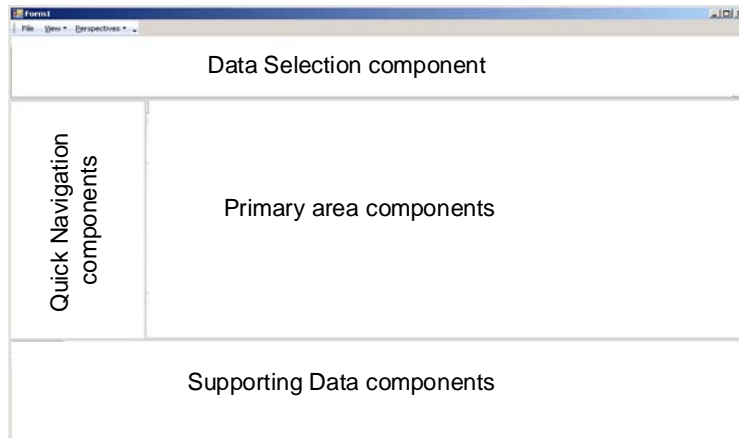
To understand how you configure the workbench, you must first understand the general layout of the workbench. The workbench user interface is divided into four areas:

- 1 **Data selection:** This area includes the basic search fields and expanded search fields that let you filter records the system retrieves in the workbenches. This area lets users select records from a very broad range—for example, all records associated with a site—to a very specific set of records—for example, a small set of orders for a particular production line. Users can optionally set user preferences so that the amount of time for the retrieval displays.
- 2 **Primary data:** This area is the heart of the MSW and PSW workbenches as well as the shortage report and CAC features. It is the area in which most users spend their time. Users select fields, rows, columns, or multiple fields, rows, and columns to manipulate data. They can also drag and drop data in this area within the MSW. Selections made in this area can change the data that displays in the supporting data area.
- 3 **Quick navigation:** This area is similar to the quick navigation that displays in many Internet browsers that helps you quickly navigate through an abundance of data.
- 4 **Supporting data:** This area includes browses and other programs that display data that supports the primary data. Programs that are new for the Planning and Scheduling Workbenches as well as browses are available through a row of tabs.

For the MSW/PSW plugin, the components that make up the four areas are as follows:

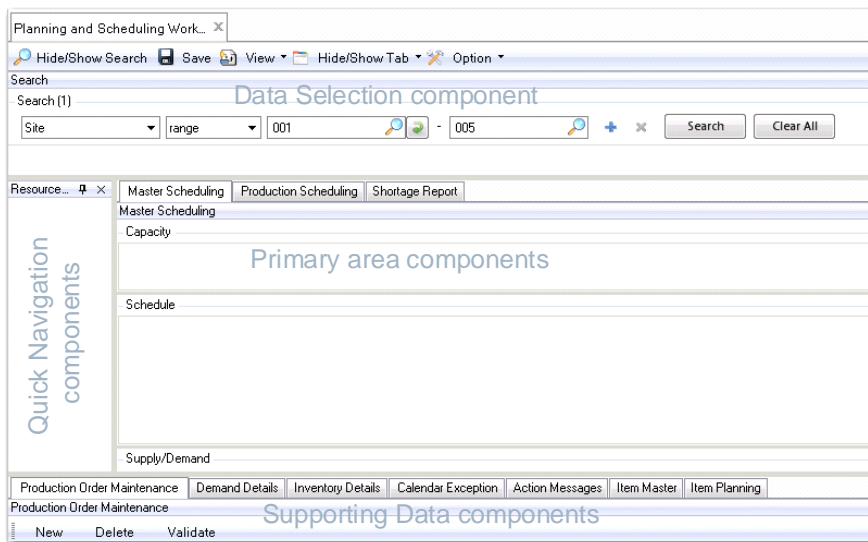
- 1 Browse component, `qpbr001.p`
- 2 Resource Navigator component
- 3 MSW, PSW and Shortage Report components
- 4 Browses Demand Details, Inventory Details, Calendar Exception, Action Messages, and Item Master data and maintenance programs, Production Order Maintenance, and Calendar Exception Maintenance

**Fig. 4.1**  
Workbench Layout



The following graphic depicts the components on the actual Planning and Scheduling Workbenches UI to help relate the components to the interface.

**Fig. 4.2**  
UI with Components



## ControlConfig.XML File

The `ControlConfig.XML` file sets up and defines the QAD Planning and Workbench configuration. It defines the major frames that display and the actual fields that display within the supporting data frames; that is, the fields that display in the programs and browses that display in the tabs at the bottom of the workbench.

The XML consists of four tags, one for each area that the user interface has as shown in the blue boxes. Each tag can contain one or more control tags. Each control tag is for a component that displays in the user interface area. Each control tag consists of a class, assembly, and name tags. In addition, there may be other tags that are unique to a certain component. The visible tag is currently not used; see Figure 4.3.

**Fig. 4.3**  
ControlConfig.XML Code

```

- <config>
- <dataselection>
+ <control>
</dataselection>
- <primary>
+ <control>
+ <control>
</primary>
- <navigation>
+ <control>
</navigation>
- <support>
+ <control>
+ <control type="browse">
+ <control type="browse">
+ <control>
+ <control type="browse">
+ <control type="browse">
- <control type="browse">
<class>QAD.Plugin.WorkbenchServices.ChildBrowseControl</class>
<assembly>WorkbenchServices</assembly>
<program>qpbr011.p</program>
+ <link>
+ <link>
<name>ITEM_PLANNING</name>
<visible>true</visible>

```

The file is located in the /config directory of your plugin installation on the local PC. In a typical system, the /config directory is located in a path like the following:

```

C:\Program Files\QAD\QAD Enterprise
Applications...\plugins\QAD.Plugin.PlanningScheduling\config\...

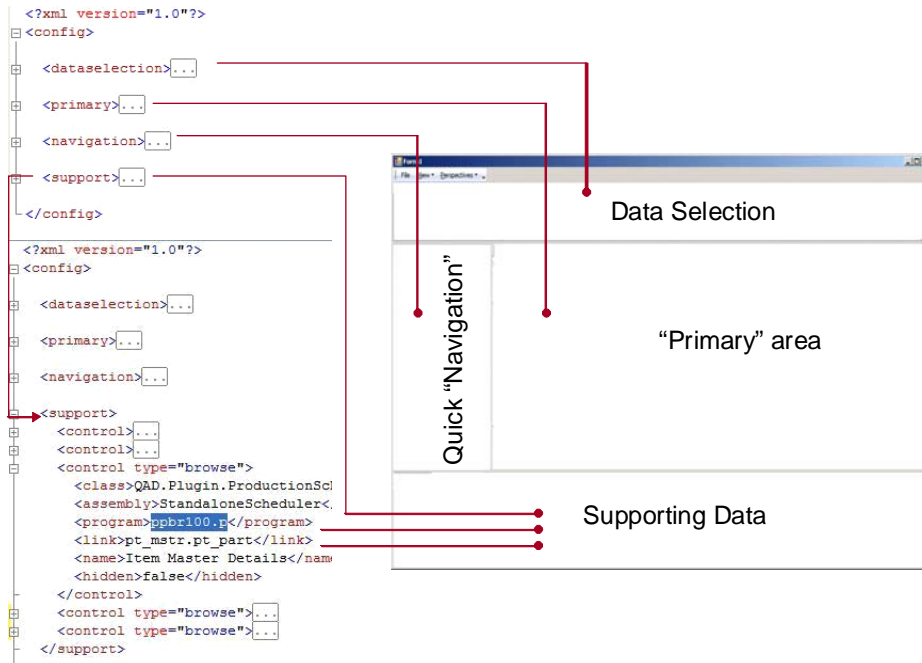
```

The file consists of control elements that define components of the workbench configuration in a hierarchical manner. For example, in the primary area are three controls are defined. These display on the user interface as three tabs:

- MSW
- PSW
- Shortage Report

Figure 4.4 depicts the code in the XML file and how it relates to the workbench framework.

**Fig. 4.4**  
Code-UI Relationship



The Resource Navigator is defined as a control element for the `<navigation>` element, and Production Order Maintenance is defined as a `<control>` element for the `<support>` element. The actual programs are defined within the class `<class:>` definitions; see Figure 4.5.

**Fig. 4.5**  
ControlConfig.XML File

```

<?xml version="1.0" ?>
<config>
- <dataselection>
  - <control>
    <class>QAD.Plugin.PlanningScheduling.DataSelectionControl</class>
    <assembly>PlanningSchedulingPlugin</assembly>
    <visible>true</visible>
    <name>SEARCH</name>
  </control>
</dataselection>
- <primary>
  - <control>
    <class>QAD.Plugin.PlanningScheduling.MasterSchedulerControl</class>
    <assembly>MasterScheduler</assembly>
    <visible>true</visible>
    <name>MASTER_SCHEDULING</name>
  </control>
  - <control>
    <class>QAD.Plugin.PlanningScheduling.ProductionSchedulerControl</class>
    <assembly>ProductionScheduler</assembly>
    <hidden>false</hidden>
    <name>PRODUCTION_SCHEDULING</name>
  </control>
- <control>
  <class>QAD.WorkOrder.ShortageMonitorControl</class>
  <assembly>WorkOrder</assembly>

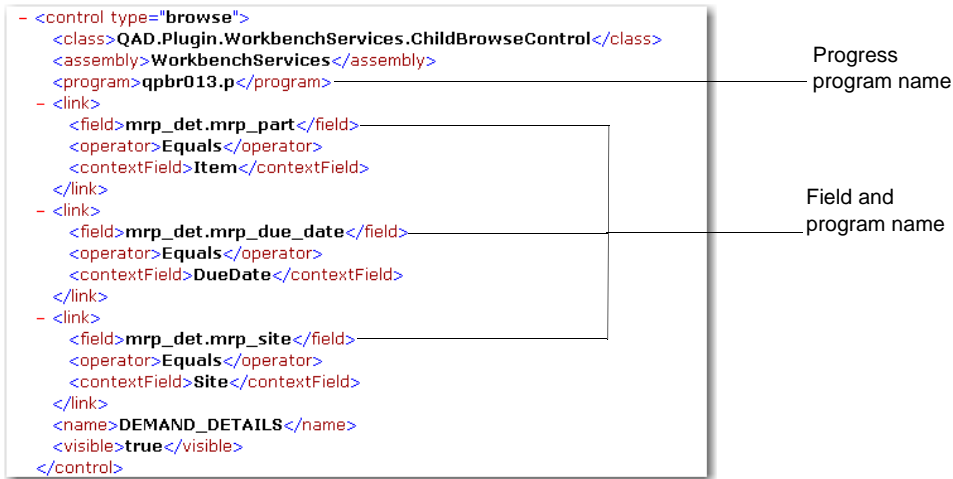
```

Defines the three major tabs that display in the workbench.

The following graphic depicts how the configuration, defined in `ControlConfig.XML`, relates to the UI.

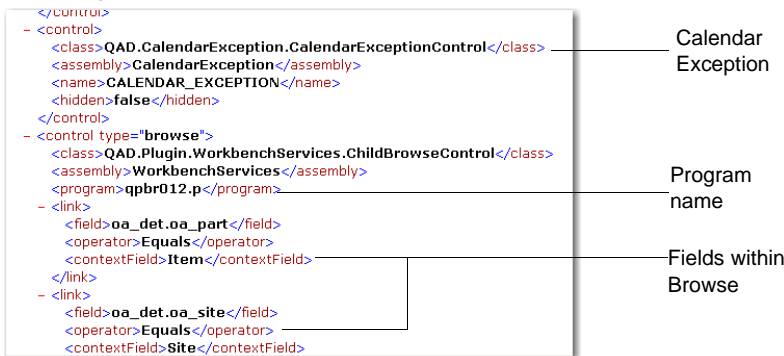
Browsers that display within Production Order Maintenance are defined in `ControlConfig.XML` as `<control type=browse>`. The file defines the QAD SE Progress program name (`.p`), then the fields within the browse are defined next, which includes the table and field name as defined within QAD SE.

**Fig. 4.6**  
Browse and Field Definitions



Other programs in tabs that display at the bottom of the workbench are also defined as control elements. This is followed by defining the control type as browse, then field definitions that display within the browses. The following figure depicts the Calendar Exception tab.

**Fig. 4.7**  
Other Program Definitions



## Adding Browsers to the Workbench

You can only configure the workbench to add browsers. Adding new components other than browsers to the XML requires that you have a knowledge of C# and workbench framework internals.

To configure, you start by accessing and editing the `ControlConfig.XML` file within the `/plugins` directory. In most cases, companies have their own data with which they work when creating master or production schedules, so the most common configuration change is the addition of a customer browse that pulls fields that hold data of interest to your schedulers.

To add a new browse that displays as a tab in the Supporting Data area alongside other QAD SE browses and programs, use the following example.

**Example** You have a QAD browse, `YourBrowsebr001.p`, customized for your business needs. You need the fields in the browse to display in a browse in the Planning and Scheduling Workbenches.

The easiest way to do this is to copy an existing browse configuration in the `ControlConfig.XML` file; then edit the copied text for your new browse entry.

To use this method, use the following procedure.

- 1 In `ControlConfig.XML`, locate and copy a browse control type definition:

```
- <control type="browse">
  <class>QAD.Plugin.WorkbenchServices.ChildBrowseControl</class>
  <assembly>WorkbenchServices</assembly>
  <program>qpbr011.p</program>
- <link>
  <field>pt_mstr.pt_part</field>
  <operator>Equals</operator>
  <contextField>Item</contextField>
</link>
- <link>
  <field>si_mstr.si_site</field>
  <operator>Equals</operator>
  <contextField>Site</contextField>
</link>
<name>ITEM_PLANNING</name>
<visible>>true</visible>
</control>
```

- 2 In the copied code, set the `<program>qpbr011.p</program>` entry to reflect the name of your new browse program, for example: `<program>YourBrowsebr001.p</program>`.
- 3 Determine which fields should be linked to the workbench, using QAD SE Browse Maintenance (36.20.13) to find valid field names for the fields that display in your browse; see Figure 4.8.

For example, if you are only interested in linking the item field with the workbench, you use Browse Maintenance for `YourBrowsebr001.p` to determine that the name of the item field is `xx_mstr.xx_part`.

- 4 Locate the `<link>` entry of the copied text, then enter the field name as depicted in Browse Maintenance within the `<field>` `</field>` parameters for the field to display in the browse.

Using the example in Step 3, enter:

```
<field>xx_mstr.xx_part</field>
```

- 5 Enter the operator as:

```
<operator>Equals</operator>
```
- 6 Enter the context for the field.

Using the example in Step 3, enter:

```
<contextField>Item</contextField>
```

For the Planning and Scheduling Workbenches, you can only enter a certain set of values for `<contextField>`. You cannot increase the set of values without QAD assistance. The set includes the following `<contextField>` values:

- Item
- Site
- DueDate
- Resource
- Resource2
- ResourceType

Where:

Resource is the production line ID or work center ID.

Resource2 is used for the machine.

ResourceType is zero (0) for the production line and one (1) for the work center or machine.

7 Continue editing existing `<link>` entries or add new `<link>` entries.

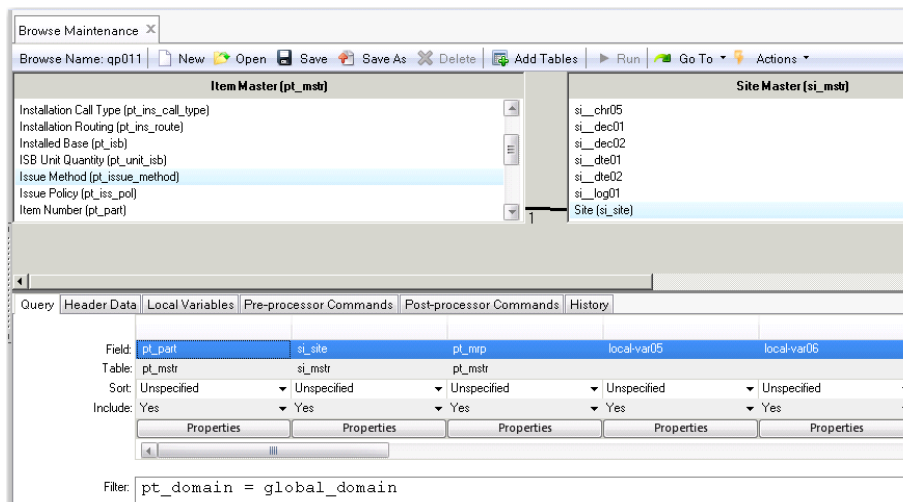
8 Name your browse and enter the name of the browse as:

```
<name>YourBrowse</name>
```

9 Save your entries.

**Important** You should configure the XML for each client machine where the Planning and Scheduling Workbenches are configured.

**Fig. 4.8**  
Browse Maintenance (36.20.13)



The following graphic depicts the code for a browse definition within `ControlConfig.XML`. It depicts how the fields names that you enter into the XML file were selected from Browse Maintenance.

**Fig. 4.9**  
XML Fields

```

- <control type="browse">
  <class>QAD.Plugin.WorkbenchServices.ChildBrowseControl</class>
  <assembly>WorkbenchServices</assembly>
  <program>qpbr011.p</program>
  - <link>
    <field>pt_mstr.pt_part</field>
    <operator>Equals</operator>
    <contextField>Item</contextField>
  </link>
  - <link>
    <field>si_mstr.si_site</field>
    <operator>Equals</operator>
    <contextField>Site</contextField>
  </link>
  <name>ITEM_PLANNING</name>
  <visible>true</visible>
</control>

```

Field:	Table:	Sort:	Include:
pt_part	pt_mstr	Unspecified	Yes
si_site	si_mstr	Unspecified	Yes
pt_mrp	pt_mstr	Unspecified	Yes

Filter: pt\_domain = global\_domain

## Saving Your Changes for New Releases

Should you update the MSW/PSW with additional releases, you must save your ControlConfig.XML file, then move it to another directory to hold while you install new files from the installation disk. Once the files install for the newer version of MSW/PSW, you can then move or copy your custom ControlConfig.XML file, overwriting the version of the file you installed for the update.

## Customizations When Updating to a New Release

When you update to a later release of the MSW/PSW, you must delete the MSW/PSW and CAC browse definitions before loading data files. The installation process presents a utility that lets you select browse definition data files to delete. When you customize any browses, you must reapply the customizations after the installation procedure is complete.

