

QAD BPM Release Notes

September 2014

The release notes include information about the latest QAD BPM fixes and changes.

Review this document *before* proceeding with any phase of a QAD BPM implementation.

These release notes are cumulative, with the most recent changes described first. Review the notes for all releases after your currently installed release. Installation and configuration changes can occur in those intermediate releases, and unless otherwise noted, apply to the release where they were announced, as well as subsequent releases.

Use the following list to find release notes for a specific product:

Release Notes for Current Release **2**

Release Notes for Release 1.3 **6**

Release Notes for Release 1.2 **9**

Release Notes for Release 1.1 **11**

Release Notes for Current Release

Version: 2.0

Date: September 2014

QAD Enterprise Applications Compatibility: QAD Enterprise Applications (EA) Standard Edition and Enterprise Edition, 2011 and later

Supported Progress Releases: OpenEdge 11.3.2 (with hotfix 011 or later)

QAD .NET UI Versions: 2.9.3 and later

QAD QXtend Versions: 1.8 and later

Languages: English, Castilian Spanish, Latin Spanish, Dutch, French, German, Italian, Japanese, Korean, Czech, Polish, Brazilian Portuguese, Simplified Chinese, Traditional Chinese

Related Documentation: *User Guide: QAD BPM*, *Administration Guide: QAD BPM*, *Installation Guide: QAD BPM*, and *Migration Guide: QAD BPM*

New and Changed Features

Core Architecture Changed to OpenEdge 11.3 BPM

In this release, the core architecture of QAD BPM has been changed from Savvion 8.0 to OpenEdge 11.3 BPM. Progress integrated Savvion 8.0 into the OpenEdge 11.3 platform as OpenEdge BPM, and enhanced it with new features, such as ABL support and streamlined product installation.

This change leads to the following major changes to QAD BPM:

- QAD BPM no longer installs the BPM server because it is now part of OpenEdge.
- QAD BPM installs Progress Corticon and uses it as the business rules engine.
- QAD BPM supports the use of Progress data types.
- QAD BPM provides a new repository mechanism.

Instructions to migrate an existing QAD BPM 1.x environment or application to QAD BPM 2.0 are provided in *Migration Guide: QAD Business Process Management*.

- Database migration makes the history records (completed process instances) and user configuration of the source BPM environment available in the target BPM environment. It converts the source SBM database to an OpenEdge 11.3 BPM database.
- Application migration allows you to run QAD BPM 1.x applications in the target QAD BPM 2.0 environment.

New Corticon Engine

With the core architecture changed to OpenEdge 11.3 BPM, Progress Corticon replaces BizRules. The Corticon engine, which the QAD BPM installer installs, provides a better suite of tools for building business rules. The QAD-built Corticon adapter replaces the BizRules adapter to simplify the invocation of Corticon Decision Services.

Changes to Data Types

In OpenEdge 11.3 BPM, Progress data types are newly introduced and Java data types are deprecated (but still supported). QAD BPM has been modified to leverage the Progress data types:

- QAD BPM components in BPM server now support Progress data types.
- Dataslots and business objects have been changed from using Java data types to using Progress data types.
- Sample processes have been changed to use dataslots and business objects in Progress data types.

The following table shows the mapping between Java data types and Progress data types.

Java Data Type	Progress Data Type
BigDecimal	DECIMAL
Boolean	LOGICAL
Date	DATATIMETZ
Decimal	DECIMAL
Document	CHARACTER
Double	DECIMAL
Integer	INTEGER
Long	INT64
String	CHARACTER
Timestamp	DATATIMETZ
URL	CHARACTER
XML	LONGCHAR

Note Java data types are still supported. So when an application is migrated from QAD BPM 1.x to QAD BPM 2.0, it is not necessary to change data types of dataslots and business objects.

New Repository Mechanism

Because Process Assets Management (known as repository) in Savvion BPM is removed from Business Process Server in Progress OpenEdge 11.3, QAD BPM provides a new file system-based repository mechanism. The repository contains the following BPM process-related artifacts:

- BPM projects, common resources projects
- Business object metadata
- Adapter metadata
- Dataslots
- Messages

This new repository mechanism also provides functions to import and export BPM artifacts, when you package and deploy BPM processes.

New Utility for Metadata Importing/Exporting

During BPM process packaging and deployment, you can use BPM Meta Utility to deal with metadata and projects. You can use this utility with OpenEdge Developer Studio to do the following:

- Import metadata and projects from a BPM package
- Create a studio package that only includes the metadata and projects for the corresponding process

Using this utility, you avoid efforts of manually importing or exporting BPM artifacts in the studio.

New BPM Properties File

The previous two properties files, `QdocWebService.properties` and `qxtend.properties`, are now merged into a single file named `qadbpm.properties`. Using this properties file, administrators can easily search and update the properties of QAD BPM.

Multiple OpenEdge 11.3 BPM Instances on One Host

You can install multiple OpenEdge 11.3 BPM instances on a single physical server. Refer to *Installation Guide: QAD Business Process Management* for more information.

QAD Environment Name Added to Tasks Notification E-mail

The tasks notification e-mail, in both the title and the body, now displays the name of the environment where the tasks notification is created. In this way, when you are using multiple environments, you can identify the source environment of the tasks. The environment name is specified during the installation of QAD BPM.

Changes to Customer Creation Sample Process

The sample process of Customer Creation now includes a new step of Customer Credit Limit Approval. In this way, the credit information for a new customer goes through review and approval to ensure that the correct credit information has been configured.

Usability Enhancement

In BPM browses, the display of the following buttons has been changed:

- Flow
- Tabular
- Audit
- Dataslots
- Details
- Comments

Now the system maintains statuses of the buttons and highlights the button that is pressed down.

Fixes

Fix Description	Internal ID	Issue Affected Versions
The Calendar icon now works properly on translated Delegated My Tasks Browse for a user using the Chinese language.	BPM-613	1.3
Previously, a user using the Chinese language could not find delegated tasks in My Tasks Browse. This problem is now fixed.	BPM-621	1.3
Previously in My Process Browse, the system incorrectly used the default calendar to calculate the due date. Now the system correctly uses the current user calendar to calculate the due date.	BPM-877	1.3
Deleting a process instance now does not fail when there is a subprocess instance with the same process instance name.	BPM-940	1.3
Previously in BPM browses, the system could not correctly display some languages that were not in the iso8859-1 character set. Now the problem is fixed.	BPM-969	1.3

Known Issues

- On Windows, after the installation of QAD BPM, the system cannot create process instances due to a bpm_handler.jar conflict. (BPM-1052 and Progress support case 00269938)
- If you log in as a user of any other language than English, you can find on the dataslot page that some of the labels are not translated. (BPM-1207)
- In approval subprocesses—for example, Customer Credit Limit Approval—Comments History tabs are not translated. (BPM-1209)
- Currently on Windows, the BPM packaging and deployment bundle cannot work properly. (BPM-1215)

Release Notes for Release 1.3

Version: 1.3

Date: September 2013

Environment: QAD Enterprise Applications (EA) Standard Edition and Enterprise Edition, 2011 and later

QAD .NET UI Versions: 2.9.3 and later

Languages: English, Castilian Spanish, Latin Spanish, Dutch, French, German, Italian, Japanese, Korean, Czech, Polish, Brazilian Portuguese, Simplified Chinese, Traditional Chinese

Related Documentation: *User Guide: QAD BPM, Administration Guide: QAD BPM, Installation Guide: QAD BPM*

New and Changed Features

Viewing Dataslots

Now you can view the dataslot information for the process instance by clicking the Dataslots button in the application toolbar. The dataslot information can be helpful, for example, in process debugging.

Role-Based Process Ownership and Visibility

A new “process ownership” concept has been introduced to increase the level of visibility for the managers of specific business processes or a specific business area. A process can be owned by one or more roles. In My Processes (History) Browse, a user of the roles can view all instances of the process that the user is responsible for. Administrators can define which role is responsible for which business process.

Changes to My Processes (History) Browsers

The My Processes (History) Browsers now display process instances according to role-based ownership instead of creator. A new Creator field has been added to the browsers.

Maintaining Process Ownership

Administrators can use Process Ownership Maintenance to define which user role is responsible for which business process. The relationship between Application and Role field is not restricted as one-to-one.

Viewing Completed Work Step in Processes Browse

In the Tile screen view of Processes Browse, you can see active work steps of the process in a child browse. Now in the child browse, a new tab is available aside the Active Work Steps tab to show all completed work steps.

Visibility to Suspended Process Instances

Suspended process instances can now also be seen in My Processes Browse and All Processes Browse.

Launching Processes from Custom Forms

Now the system allows users to launch a process from a custom screen in QAD .NET UI. To achieve this, the application developer defines the custom form and process in BPM Studio and the administrator adds a menu entry to .NET UI configuration file. After these actions, authorized users can see the launch process menu in .NET UI and use it to launch the process.

Packaging and Deploying Business Processes

Now administrators can use a tool `bpm_package.sh` to package deployed processes, BizRules, and any other BPM artifacts in one BPM environment and deploy or install it to another BPM environment. The artifacts can include business objects, business object meta data, adapters, adapter meta data, dataslot meta data, messages, and any other common resource files.

Fixes

Fix Description	Internal ID	Issue Affected Versions
Now in My Task Browse, when you select a business process and click the Details button, the system passes DocumentID to the corresponding function correctly.	BPM-737	1.2
Previously for the approval subprocess, the system failed to display comments of the first approval cycle. Now the system displays comments for all approval cycles correctly.	BPM-751	1.2
Previously for some Item sample processes, some swim lanes had no performer name. Now the issue is fixed.	BPM-753	1.0+
Previously when a new version of a process was deployed, BPM browses did not work. Now the issue is fixed.	BPM-754	1.2
Previously when the parent process was removed, the completed tasks were still displayed in the History Browse. Now when the parent process is removed, the completed tasks are no longer displayed.	BPM-761	1.0+
Previously when a user logged out from .NET UI and logged in again without closing the client, the BPM menus would disappear. Now the issue is fixed.	BPM-767	1.2
Now when multiple versions of the same process exist, all process instances use labels and instructions from the corresponding process template versions correctly.	BPM-774	1.2
Now the Refresh button in BPM browses works normally in .NET UI version 3.0.	BPM-793	1.2
Previously when multiple versions of the same process existed, My Tasks Browse and All Tasks Browse did not function correctly. Now the issue is fixed.	BPM-794	1.2
Previously in the Processes Browse, when a subprocess instance was completed in the flow view and the user clicked Refresh, the flowchart would close. Now the Refresh button works as expected.	BPM-795	1.0+
Now the adapter that returns application data from API works fine, as <code>suppressResponseDetails</code> in <code>QDoc11MethodAdapter</code> now can be set to <code>False</code> .	BPM-817	1.2
Now the Add to Favorites button in BPM browses works normally in .NET UI version 3.0.	BPM-822	1.2
Previously in My Tasks Browse and All Tasks Browse, when record per page was set to All, the search function reported errors. Now the issue is fixed.	BPM-838	1.0+

Fix Description	Internal ID	Issue Affected Versions
Previously when a completed process instance was removed and a user clicked Actions in the Processes Browse, the system reported errors. Now the issue is fixed.	BPM-847	1.1+
Now in Query Adapter, Max Rows can be set to zero to allow the query to return all records that meet query conditions.	BPM-854	1.0+
Now even without Internet access, the installer can successfully install BPM.	BPM-859	1.0+
Report action in BPM browses now works as expected.	BPM-868	1.0+

Release Notes for Release 1.2

Version: 1.2

Date: March 2013

Environment: QAD Enterprise Applications (EA) Standard Edition and Enterprise Edition, 2011 and later

QAD .NET UI Versions: 2.9.3 and later

Languages: English, Castilian Spanish, Latin Spanish, Dutch, French, German, Italian, Japanese, Korean, Czech, Polish, Brazilian Portuguese, Simplified Chinese, Traditional Chinese

Related Documentation: *User Guide: QAD BPM, Installation Guide: QAD BPM*

New and Changed Features

Multi-level Processes Browsers

The process browsers now only list top level processes initially. User can click and expand a process and see the child processes under it and active tasks in a child browse. The Tile Screen button and Full Screen button help to display or hide the child browse. From the child browse, you can select a task and bring up the Tasks Browse.

Read-only Process View

A Flow view button has been added to task browsers so that user can see the whole process and understand the context of a task. However, this view is read-only, which means that users cannot modify the process or work steps in task browsers.

Process Name Display

The process names, which are displayed in views (Flow, Tabular, and Audit) and associated pages, are simplified and more meaningful to users. A displayed process name now includes process labels and values for documented IDs and Keys, and so on.

Labels for Document Fields

In BPM browsers, the system shows labels for document IDs and keys with their field values, which makes the labels more meaningful.

Changes to Sample Processes

The Item Creation and Supplier Creation sample processes now contain several approval subprocesses demonstrating the generic approval process pattern.

Usability Changes

- The Chart view button has been renamed to Flow.
- An Assign button has been added to Assign User Browse and Reassign User Browse.

Enhancements to Installer

- Installer is able to install BPM against QADERP database whose security exists.
- Installer now supports the use of DBMAN for QAD BPM database.

Fixes

Fix Description	Internal ID	Issue Affected Versions
Tasks with custom JSP forms can now be completed in Task Browses.	BPM-647	1.0+
Now the system can handle the situation where the installed process template name is different from the application name; the process instance can be launched correctly.	BPM-648	1.0+
Previously in Task Browses, if the qadsh link for a task was invalid, clicking the Details button would result an error and later the button could not be used for other tasks. Now when there is an incorrect qadsh link for a task, an error message appears to inform the user, and Details button works properly for other tasks.	BPM-651	1.0+
Previously in Tasks browses, a Java SQL error would appear when a user sorted on Application column and then pressed the Search button. Now the problem is solved.	BPM-652	1.0+
Now BPM can work with a QXtend outbound receiver named other than <i>QADQXO</i> .	BPM-656	1.0+
The system now pops up a warning message when BPM settings are incorrect in the client-session.xml.	BPM-681	1.0+
Administration tab and pages in BPM Portal are now displayed normally when QADRealm is disabled.	BPM-683	1.0+
Now the system prevents work steps to be completed from Flow or Tabular View by other users.	BPM-688	1.1
Previously, QDoc Adapters retried call to QXI and would display a misleading error "Receiver is not specified". Now the real error is reported	BPM-689	1.0+
Previously in task browses, if a task had internal work item ID larger than 1000, it would be disabled when selected. Now it can be selected fine.	BPM-704	1.0+
BPM now includes root causes in email sent by BizLogic when Query Service Adapter receives SOAP errors from QXtend.	BPM-707	1.0+

Known issue

- If a Document ID or Document Key with process labels is passed to the Details screen, the system reports an error saying that the record does not exist. We recommend that you get a patch from QAD to solve the issue.

Release Notes for Release 1.1

Version: 1.1

Date: September 2012

Environment: All QAD Enterprise Applications (EA) Standard Edition and Enterprise Edition, 2011 and later

QAD .NET UI Versions: 2.9.3 and later

Languages: English, Castilian Spanish, Latin Spanish, Dutch, French, German, Italian, Japanese, Korean, Czech, Polish, Brazilian Portuguese, Simplified Chinese, Traditional Chinese

Related Documentation: *User Guide: QAD BPM, Installation Guide: QAD BPM*

New and Changed Features

Tasks Notification

You can subscribe to BPM Task Notifications and receive email notifying you that there are BPM tasks to work on. There is a link in the email which directly takes you to your Tasks Browse.

Generic Approval Process Pattern

A generic pattern has been provided to implement the review/approval process. This feature allows process designers to quickly design an approval process using the template. During the execution of the process, approvers can approve or reject with comments; all approval or rejecting history is kept. At the end of the process, the overall result is generated and email can be sent out to stakeholders.

History Browse

The following browses have been added to BPM menu:

- My Task History Browse and My Process History Browse for all users
- All Tasks History Browse and All Processes History Browse for QAD admin users

These history browses allow user to see completed tasks or processes.

Event Process Acknowledgement

BPM can send QDoc event processing results asynchronously to QXtend. This seamless integration with QXtend allows users to efficiently track event message status and process results in QXtend.

Patch Delivery Process

A formal patch creation and delivery process is available for users to upgrade a BPM environment to a certain patch level safely and efficiently.

Language Support

BPM now supports 14 languages.

Fixes

Fix Description	Internal ID	Issue Affected Versions
Now when multiple versions of the same process are deployed to the server and you filter on the Application Name in the browses, all deployed process versions can be displayed. Previously only one of the deployed versions could be displayed.	BPM-560	1.0
Previously when a user group was defined as dynamic dataslot group by process developers, users in the group could not use the buttons Make Available and Reassign for their tasks. Now the buttons work properly.	BPM-561	1.0
Now there is an option for the managed adapters to suspend on error. If suspendOnError is True, the system suspends work steps when error is returned from QXtend.	BPM-586	1.0
Now BPM Profile can be validated when saving BPM Subscriber with SSL enabled on subscriber.	BPM-590	1.0

Known Issues

- Sometimes the system suspends the NotifyStakeholders work step, because the stakeholder's email address has not been set up in QAD EA. The issue is, even after the stakeholder's email is set up, the suspended workstep cannot be resumed. The workaround for this issue is to create another process instance for the process.
- In the Processes Browse, dataslot values are not displayed for process instances.
- BPM can use the Query Service only when Require Authentication is disabled on the QXI receiver.