

QAD Configurator Release Notes

March 2012

These release notes include information about the latest QAD Configurator fixes and changes. These changes may affect the way you implement and use QAD Configurator.

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

QAD highly recommends that you implement the latest QAD Configurator release available. Check the QAD Web site to make sure you have the latest QAD Configurator release notes, installation errata, installation guide, and installation media.

<http://support.qad.com>

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Release Notes for Current Release

QAD Configurator Version: 5.3

Release Date: March 2012

QAD Product Suite Compatibility: eB2.1 SP4, QAD 2007, QAD 2007.1, QAD 2008 Standard, QAD 2008.1 Standard, QAD 2008.1 Enterprise and later

Documentation Updates

The following documents have been updated for this release:

User Guide: QAD Configurator (the new item number: 70-3189-5.3); *Installation Guide: QAD Configurator* (the new item number: 78-0914-5.3)

New and Changed Features

- Maintaining Configuration Keys
- Using Standard Configurations in Configuration Questionnaire
- Maintaining Standard Configurations
- Maintaining Configurations Manually
- Using New System Variables
- Performance Enhancements for Configuration Rebuild
- Performance Enhancements for Configuration Questionnaire
- Usability Enhancements for Configuration Questionnaire

Maintaining Configuration Keys

Now for a configurable item, you can specify up to twenty features that together form a configuration key.

Using Standard Configurations in Configuration Questionnaire

A new tab Standard Configurations is added to Configuration Questionnaire. Standard Configurations are configurations recommended by the manufacturer to make it easier for customers to order configured items. For example, standard configurations can be popularly ordered configurations in the past, or some particular configurations that a marketing campaign wants to promote.

Maintaining Standard Configurations

A new function Standard Configuration Maintenance is added. You can use Standard Configuration Maintenance to get standard configurations shown in the questionnaire. To set an existing configuration to a standard configuration, just select the check box above the configuration ID of the existing configuration.

To use Standard Configuration Maintenance:

- 1 Select a group using the binocular button on the toolbar.
- 2 Specify a configurable item in the Configurable Item field; the system displays all available configurations of the configurable item for you to choose.

- 3 Browse through all available configurations; you can also use the search capabilities to search for configurations that meet your criteria.
- 4 Select the check box above a Configuration ID to set the configuration as standard. You can set one or more standard configurations.
- 5 Click Save.

After you have standard configurations, the next time you use Standard Configuration Maintenance, the standard configurations are shown first, followed by non-standard configurations.

Maintaining Configurations Manually

Changes are made to Manual Configuration Maintenance so that you can browse the configuration, modify descriptions, and add comments for variant items created from questionnaire configurations.

Using New System Variables

Four system variables—sysExtLaunch, sysQuestLaunch, sysConfigurationDesc, and sysConfigurationCmmt—are added to define specific sales and product configuration rules.

Performance Enhancements for Configuration Rebuild

There are significant performance improvements to configuration rebuild.

Performance Enhancements for Configuration Questionnaire

There are performance improvements to the Questionnaire.

Usability Enhancements for Configuration Questionnaire

- Tips are now added for long questions in the Questionnaire.
- Tips are now added for long answers in the Questionnaire.

Fixes

Issue Number	Fixes
CFG-1505	Now all records are displayed when users use the down key to view records in General Prod Struct Rule Maint.
CFG-1530	Validate Orphaned Rule and Delete Orphaned Rule now also work for Routing rule in Cross Validation Analyzer.
CFG-1551	An error in loading 441-522.df to the database using cpdutil in upgrading Configurator is fixed.
CFG-1552	Now a feature value can be printed on Configuration Report, even if the report cannot parse the data type of the feature.
CFG-1557	For header features in the Questionnaire, the Price is now displayed after the Description.
CFG-1558	Now the default cursor locations on Questionnaire are as follows: <ul style="list-style-type: none">• In Standard Configurations and Existing Configurations, the cursor is on New Configuration.• In Configure Item, the cursor is on View Summary.• In Configuration Summary, the cursor is on Save Configurations.
CFG-1559	For header features in the Questionnaire, item description 1 and item description 2 are added after the item number.
CFG-1560	In the Configure Item screen, a button Save Configuration is added to the Configurator tab.
CFG-1564	An error of using a customer item in the order line to launch Questionnaire is fixed.
CFG-1568	In Configurable Item Maintenance, you can now tab through the fields in the correct order.
CFG-1569	In Element Roll-Up, the Master Element field inputs are not case sensitive now.
CFG-1570	When a user closes the questionnaire window without saving, the system now asks if the user wants to save the answers before closing the window.
CFG-36	Now variable options are displayed properly in General Prod Struct Rule Maint.

Release Notes for Release 5.2.2

QAD Configurator Version: 5.2.2

Release Date: September 2011

QAD Product Suite Compatibility: eB2.1 SP4, QAD 2007, QAD 2007.1, QAD 2008 Standard, QAD 2008.1 Standard, QAD 2008.1 Enterprise, QAD 2009 Standard, QAD 2009 Enterprise, QAD 2009.1 Enterprise, QAD 2010 Standard, QAD 2010 Enterprise, QAD 2010.1 Enterprise, QAD 2011 Standard, QAD 2011 Enterprise, QAD 2011.1 Enterprise

Related Documentation: *User Guide: QAD Configurator* (item 70-3189A); *Installation Guide: QAD Configurator* (item 78-0914B)

New and Changed Features

- Show All Options of Feature
- Customer Specific List Price
- Enhancement for Browse Code
- Copy from Variable
- Copy from Rule Table
- Validate Orphaned Rule and Delete Orphaned Rule
- Using Custom Functions in Product Configuration Rules
- Performance Enhancements for Configuration Rebuild
- Performance Enhancements for Configuration Questionnaire

Show All Options of Feature

For Configurable Item Maintenance, you can now specify whether to show all feature options or only available options.

- If Show All Options of Feature is Yes, the excluded options, which are not available to select, can be seen as dimmed.
- If Show All Options of Feature is No, you cannot see the excluded options.

The Show All Options of Feature setting is also available for questionnaire customization. You can use this setting to facilitate diagnosing configuration errors. The default value of the setting is inherited from the setting in Configurable Item Maintenance.

Customer Specific List Price

For Configurable Item Maintenance, you can now control whether the price list for list price is customer specific or not.

- If Customer Specific List Price is Yes, the price list for list price, which is created by the system, is based on the current customer.
- If Customer Specific List Price is No, the created price list for list price is general, not customer specific.

The Customer Specific List Price setting only applies when Create a Price List is selected. By default, this setting is selected when Create a Price List is selected. Note that whether this setting is selected or not, the created price list for net price is always customer- specific.

Enhancement for Browse Code

When using the browse code in Variable Maintenance or Feature Maintenance, you can now specify as many as five parameters for the browse. The parameter can be a variable, a feature, or even a constant.

Copy from Variable

For Variable Maintenance, you can now use the Copy from Variable button to create a new variable. Just enter the variable ID first, click the Copy From Variable button, and select a variable whose details you want to copy.

Copy from Rule Table

You can now use the Copy from Rule Table button to generate a rule table. Just click the Copy from Rule Table button, and then select a rule table whose rules you want to copy. After the new rule table is generated, you can edit the table to get the rules that you need.

Validate Orphaned Rule and Delete Orphaned Rule

You can now delete orphaned rules by selecting the Validate Orphaned Rule and Delete Orphaned Rule options. Currently, the options are only for product structure (BOM) rules and not for routing rules.

Using Custom Functions in Product Configuration Rules

Previously custom functions are only available for some product configuration rules. Now custom functions are available for all product configuration rules.

Performance Enhancements for Configuration Rebuild

- There has been significant performance improvement in configuration rebuild.
- When repricing configurations, you can now specify the Effective Date for the updated price lists to take effect. You can either select or manually enter the effective date in the Effective Date drop-down list.

Performance Enhancements for Configuration Questionnaire

- There has been significant performance improvement in questionnaire loading.
- There has been significant time reduction in rule execution and thus improved questionnaire processing performance.

Fixes

The following issues have been fixed in this release of QAD Configurator.

Table 1 ECO List

ECO Code	Fixes
Q4G9	When users clicked the Answer All button in Configuration Questionnaire, some default answers were not set properly.
Q4KK	Temporary Configurator files are now written to the DLC directory.
Q4LF	The Questionnaire now can also be launched by entering a customer item number on the sales order or sales quotation line.
Q4L4	Not all variant costs were copied correctly from costs of configurable items.
Q4MD	Element-type variables for sales quotes did not show in the questionnaire.
Q4M4	The compatibility issue between Configurator and previous QAD Reference Architecture (QRA) versions is now fixed.
Q4M9	Improvements of the Configuration Rebuild are made, including updating price lists, execution of external entity rules, and setting the effective start date correctly.
Q4N5	Values for entry boxes in Configuration Rebuild can now be numeric.
Q4N6	Features used in product structure assignment rules are now included in the Where-Used Report.
Q4N7	An issue of the Model Import is fixed.
Q4N9	Rule tables now update default values in the Questionnaire.
Q4NZ	When an existing variant item is ordered in a different currency, the line price is now updated accordingly.
Q4PD	Values for entry boxes in Questionnaire and Question Browse can now have more than two decimal places.
Q4PS	The Configuration Rebuild now displays all error messages in the Rebuild Report, instead of writing some error messages to a log file.
Q4Q7	Variant Product Structure Rule Maintenance now handles items with very large product structures without an error.
Q4Q8	Variant Sales Order Line Rules and Variant Sales Quote Line Rules can now also be executed in Sales Order and Sales Quote multi-line mode.
Q4SG	There is improvement to the verification of lower level components for non-configurable items.
Q4S2	Cancelling the variant item creation process now maintains the sequence of the options in the Questionnaire.
Q4TP	Now using the up and down arrow keys in General Product Structure Rule Maintenance results in the correct records being displayed.
Q4TZ	Configurable Item Maintenance now correctly displays the Analyzed status when exiting the program.
Q4YJ	The Rebuild Report now works fine when Configurator is used in conjunction with Trade Management (TrM).

Release Notes for Release 5.2.1

QAD Configurator Version: 5.2.1

Release Date: September 2010

QAD Product Suite Compatibility: eB2.1 SP4, QAD 2007, QAD 2007.1, QAD 2008 Standard, QAD 2008.1 Standard, QAD 2008.1 Enterprise, QAD 2009 Standard, QAD 2009 Enterprise, QAD 2009.1 Enterprise, QAD 2010 Enterprise, QAD 2010.1 Enterprise

Related Documentation: *User Guide: QAD Configurator* (item 78-0913A); *Installation Guide: QAD Configurator* (item 78-0914A)

New and Changed Features

- Active User Check
- Enhanced Variant Product Structure Rule Maintenance Function
- Comments Handling in Model Import/Export
- Support for QAD Trade Management 2.8.2
- SO/SQ Line Rules Execution
- Price List Creation
- Variables/Features without Default Values

Active User Check

After the QAD ERP data comparison, the system checks whether there are any users currently processing questionnaires within the groups being loaded. If active users are found, the Active User Manager appears showing active and queued users and prompting to cancel the load or wait until no user is active. If you choose to wait, when all users have completed their questionnaires, the load process will automatically continue.

Enhanced Variant Product Structure Rule Maintenance Function

The Product Structure Rule Maintenance function has been rewritten with the following significant enhancements:

- You can now define rules for multiple components before saving your changes all at once. Previously, you could only define and save rules for one component at a time.
- The Variant Product Structure Rule Filter is now called Component Filter and its icon is now located at the top-right corner of the screen.
- You can now save assignment rules without having to perform and pass the syntax check.
- The number of assignment rules is now displayed on the Assignment Rule tab.

Comments Handling in Model Import/Export

Importing and exporting data using Model Import/Export now includes comments in the data package. Previously, comments were not a part of the data package and therefore could not be transferred between systems through Model Import/Export.

You can enter comments in the following Configurator functions:

- Master Group Maintenance

- Configurable Item Maintenance
- Variable Maintenance
- Variable Option Maintenance
- Feature Maintenance
- Feature Option Maintenance
- Rule Group Maintenance

Support for QAD Trade Management 2.8.2

In addition to Trade Management (TrM) 2.7.6, this release of QAD Configurator also supports TrM 2.8.2, and a new patch is available under the `CfgAppServerDir/cpd/trmitemapi` directory for integration with the newly supported TrM version.

The 2.8.2 patch has been certified against this configuration: QAD 2009 SE + QXtend 1.6.2 + TrM 2.8.2.

If there are customizations in your TrM programs, you have to manually merge them into the following program files contained in the TrM patch that ships with Configurator:

gaiginc.i	ppptapm3.i	aichfv1.p	ppptapm3.p	aidrva.p
ppptmta.p	gbcdrval.p	ppptpt.i	gbcdrvam.p	gprdrvaaa.p
gbcdrva.p	grpdrva3.p	gbcvap3.p	grpdrva.p	gcdcont7.p
gsinxbtch.i	gifapm017.p	gsinxwork.i	gifapm019.p	gsiprgacc.i
gifapm021.p	gsirptinc.i	pppdspt.i	gsisubmt2.i	ppptapm1.i
gsrpdrv2.p	ppptapm1.p	gspsisdef.p	ppptapm2.p	gsptopln.p

SO/SQ Line Rules Execution

Previously, the system executed SO/SQ line rules only when creating a new variant item. In this release, SO/SQ line rules are also executed when you order an existing variant item. Selecting an existing variant item sets default values for the line fields.

The system now executes SQ/SO line rule when:

- you click the Order icon on the existing configurations list
- you click the Order icon on the similar configurations list
- you click the order icon in the Save Variant Item window
- the system finds a matching variant item and selects it automatically

Price List Creation

When you order an existing variant item, the system now first checks for existing valid price lists. If a valid price list is found, the system uses the price list to price the SO/SQ line; if none is found, the system creates a new price list to make sure the correct price is applied to the SO/SQ line.

Note You must set Create Price List in Configurable Item Maintenance to Yes to enable this function.

Variables/Features without Default Values

You can now define text or numeric list type variables and features without default values.

Fixes

The following issues have been fixed in this release of QAD Configurator.

Table 2 ECO List

ECO Code	Fixes
Q417 & Q48N	Wrong price list.
Q42M	The system displays different messages: <ul style="list-style-type: none">• When you order an existing variant item, “Variant variant# selected”• When it creates a new variant item, “Variant variant# created”
Q46R	Improved performance in looking up configurations.
Q47Z	Element-type variables and features cannot have pricing information.
Q484	List price and net price cannot share the same variable.

Release Notes for Release 5.2

QAD Configurator Version: 5.2

Release Date: March 2010

QAD Product Suite Compatibility: eB2.1 SP4, QAD 2007, QAD 2007.1, QAD 2008 Standard, QAD 2008.1 Standard, QAD 2008.1 Enterprise, QAD 2009 Standard, QAD 2009 Enterprise, QAD 2009.1 Enterprise, QAD 2010 Enterprise

Related Documentation: *User Guide: QAD Configurator* (item 78-0820A); *Installation Guide: QAD Configurator* (item 78-0819A)

These release notes describe the most significant changes and fixes introduced with this version of QAD Configurator.

- Oracle Database Support
- Forecast Consumption by Configurable Items
- View Configuration Details Browse Collection
- Integration with QAD Trade Management

Oracle Database Support

This release of QAD Configurator supports the Oracle database as well as the Progress database.

Forecast Consumption by Configurable Items

Use Variant Planning Item Rule Maintenance to define variant planning item selection rules for non-kit configurable items. Variant planning items are used to consume forecast when confirmed sales orders are created for variant items. For configurable items that are physical or phantom kits, when you generate variant items from them, the system adds components of their variant items to the `mrp_det` table so that they also consume forecasts upon sales order confirm.

When you create a variant item by either creating a new configuration or modifying an existing one, the system applies the variant planning item rule to add the variant item to the product structure of the planning item as a component. When the variant is put on a sales order line and confirmed, the forecast of the planning item, if set up, is consumed by the order quantity.

For a multi-level product structure, there can be multiple configurable items with their own planning items and selection rules.

View Configuration Details Browse Collection

You can now use the new View Configuration Details browse collection to view details of existing configurations, including features, short questions, options, short answers and functional groups. You do not have to be a licensed Configurator user to use this browse collection in QAD EE.

Integration with QAD Trade Management

This release of QAD Configurator can be integrated with QAD Trade Management. When creating a variant item, the system copies TrM product data as well as product division data from the configurable item to the variant item.

If you want to integrate the Configurator variant item creation process with the QAD Trade Management product, you must apply the Configurator-TrM integration patch and perform some additional steps. The patch has only been certified against this configuration: QAD 2008.1 SE + QXtend 1.6.2 + TrM 2.7.6.

Release Notes for Release 5.1

QAD Configurator Version: 5.1

Release Date: September 2009

QAD Product Suite Compatibility: eB2.1 SP4, QAD 2007, QAD 2007.1, QAD 2008 Standard, QAD 2008.1 Standard, QAD 2008.1 Enterprise, QAD 2009 Standard, QAD 2009 Enterprise, QAD 2009.1 Enterprise

Related Documentation: *User Guide: QAD Configurator* (item 78-0761B); *Installation Guide: QAD Configurator* (item 78-0762BC)

These release notes describe the most significant changes and fixes introduced with this version of QAD Configurator.

- Configuration Rebuild
- User-Defined Warning Messages
- Variant Item-Site Data Options
- New Browsers and Browse Collections
- Custom Functions in Sales and Product Configuration Rules
- System Variables in Sales and Product Configuration Rules
- Non-editable Configurable Item Descriptions
- New Process Maps
- Configurator Metrics

Configuration Rebuild

You can now use Configuration Rebuild to quickly make batch changes to multiple configurations and update variant items data without having to go through the questionnaire entry process. You can also reprice configurations as well as update variant product structures and routings for selected variant items during the rebuild process.

The Configuration Rebuild function does not create new variant items from existing configurations. For configurations without variant items, only features and price information can be updated.

User-Defined Warning Messages

When constructing sales configuration rules, you can now define warning messages to display when a particular rule condition is met during the questionnaire entry process.

Variant Item-Site Data Options

You can now specify for each configurable item, whether to create item-site data along with item master records when the system generates variants from the configurable item, and if so, which sites to use to create item-site data. This feature can be disabled during system installation as needed.

New Browsers and Browse Collections

The following menu-level browsers and browse collections are now available for easily viewing, filtering and sorting configurations, variables, and features:

- Configuration browse
- View Variables and Features browse collection
- View Configurations browse collection

Custom Functions in Sales and Product Configuration Rules

The system now lets you easily define and maintain custom functions in two separate Progress programs and use them in sales and product configuration rule definitions. These custom functions are called and executed when the system processes the rules containing them.

System Variables in Sales and Product Configuration Rules

You can now use the following exposed system variables when defining sales and product configuration rules.

Variable	Description	Comment
sysDomainID	Current domain ID	Used in both sales and product configuration rules.
sysGroupID	Current master group ID in Configurator	
sysConfigurableItemID	Current configurable item ID	
sysUserID	Current QAD ERP log-in user ID	
sysUserLanguage	Current QAD ERP user language code	
sysConfigurationID	Configuration ID	When used in sales configuration rules, the variable contains the reloaded configuration ID for reloaded configurations and is blank for new configurations. When used in product configuration rules, the variable contains the current configuration ID.
sysVariantItemID	Variant item number	The variable can only be used in sales configuration rules. The variable contains the variant item number of the reloaded configuration for reloaded configurations and is blank for new configurations.

Non-editable Configurable Item Descriptions

The system no longer lets you modify configurable item descriptions retrieved from the QAD ERP item master. Previously, you could edit the Description field in Configurable Item Maintenance.

New Process Maps

The Configurator process maps have been updated and are now integrated into the Supply Chain View and Vertical Industry View process maps in the QAD .NET UI 2.8.2.

Configurator Metrics

Configurator now offers you a set of metrics to help you gauge how effectively you are using Configurator on a daily basis in order to reveal opportunities for improvement and make the best use of the product. This visual management tool lends at-a-glance insight into your performance level in using Configurator by graphically representing the following KPIs (Key Performance Indexes):

- Configurator Model Completeness
- Configurator Rules Completeness
- Configurator Operational Performance

Release Notes for Release 5.0.2

QAD Configurator Version: 5.0.2

Release Date: July 2009

QAD Product Suite Compatibility: eB2.1 SP4, QAD 2007, QAD 2007.1, QAD 2008 Standard, QAD 2008.1 Standard, QAD 2008.1 Enterprise, QAD 2009 Enterprise, QAD 2009 Standard

Related Documentation: *User Guide: QAD Configurator* (item 78-0761A); *Installation Guide: QAD Configurator* (item 78-0762B). The installation guide has been updated for this release.

These release notes describe the most significant changes and fixes introduced with this version of QAD Configurator.

- The system has been modified to answer all unknown background questions before saving a configuration and to cancel committing changes if an error occurs.
- List price and net price are now available as configuration search criteria in the questionnaire.
- The system now lets you choose whether to retain the original sequence or automatically modify it when you run the Analyzer to analyze features.
- When you access Configurator in the QAD .NET UI, the system now displays by default the master group and configurable item information you last worked with.
- In External Entity Rule Maintenance, you can now assign rules to multiple fields for an entity.
- The system has been modified to take lower-case letters into account when creating alphabetical variant numbers.
- There has been significant performance improvement in querying configurations in the questionnaire.
- You can now use your customized sales order and sales programs with Configurator by specifying their file names in a new `command_config.xml` configuration file located under the `AppShellDir/plugins/QAD.Configurator` directory.
- Manual Configuration Maintenance now supports fill-in fields associated with browses.
- In Variant Product Structure Rule Maintenance, the system now displays components with no P/M type defined when you select Blank as the P/M type filter criterion. Previously, these components were only displayed when none of the P/M type criteria was selected.
- A defect has been fixed that incorrectly displayed item prices as zero in the questionnaire.
- A defect has been fixed that caused incorrect question sequence in Questionnaire Sequence Maintenance when the configurable item has a multi-level structure.
- The system no longer displays a JavaScript error message when answers contain percentage symbols (%) in the questionnaire.
- The system now removes all error messages about feature options when their statuses are reset.
- A defect has been fixed that caused an XML structure error when a configuration was saved for a customer whose name contained the “&” character.
- A defect has been fixed that caused sales order/sales quotation rules execution to fail when items existed in multiple domains.
- Domain has been added to the Web-based questionnaire API parameters.

Release Notes for Release 5.0.1

QAD Configurator Version: 5.0.1

Release Date: April 2009

QAD Product Suite Compatibility: eB2.1 SP4, QAD 2007, QAD 2007.1, QAD 2008 Standard, QAD 2008.1 Standard, QAD 2008.1 Enterprise, QAD 2009 Enterprise

Note During the product life cycle, QAD changed the name of the former MFG/PRO eB2.1 product to QAD 2008 Standard. Individual releases of QAD 2008 Standard are identified by a decimal number; for example, QAD 2008.1 Standard. (The Service Pack 5 and 6 releases were branded as QAD 2007 and QAD 2007.1, respectively.) The current Enterprise Financials version of the product is called QAD 2009 Enterprise and follows the same convention of identifying individual releases with a decimal number.

Related Documentation: *User Guide: QAD Configurator* (item 78-0761A); *Installation Guide: QAD Configurator* (item 78-0762A)

These release notes describe the most significant changes and fixes introduced with this version of QAD Configurator.

- Support for QAD .NET UI
- Terminology Changes
- QAD Configurator Process Maps
- Revamped Menus
- Major UI and Functionality Changes

Support for QAD .NET UI

QAD Configurator has now moved away from the former Windows graphical user interface (GUI) to fully support the QAD .NET user interface (UI). All QAD Configurator GUI programs have been rewritten using the QAD .NET UI framework, which is based on Microsoft .NET technology.

Using the QAD Configurator .NET UI, you can:

- Have multiple workspaces open simultaneously and multiple programs open at the same time.
- Use an enhanced menu system that:
 - Provides full search capability
 - Displays function menus in tree view
 - Displays only those menu choices that a user has security access to execute
 - Supports a user-defined menu that applies across applications
- Display records using enhanced browses that feature:
 - Drag-and-drop arrangement of columns that can be hidden and resized
 - Single-click column sort
 - Simple searches for matched strings in a specific column or advanced search that lets you build complex queries, including discontinuous range searches
- Use common security control and log-in functions provided by the QAD .NET UI framework.

Also, since the UI is based on Microsoft .NET technology, it incorporates familiar UI metaphors, reducing the need for you to learn how to navigate QAD applications.

Terminology Changes

Some old terms adopted in previous versions of QAD Configurator have been replaced by more accurate and user-friendly ones.

Old Term	New Term
knowledge building	sales configuration
knowledge exploitation	product configuration
generic item	configurable item
result	configuration
result key	configuration key

The term COP (Configuration Output Processor) is not used anymore.

QAD Configurator Process Maps

A set of QAD Configurator process maps are provided to help you make the most effective use of the product. These graphical models of workflows organically link together key Configurator functions and sub-processes and represent best practices in customizing products in the make-to-order and assemble-to-order environments.

Revamped Menus

The QAD Configurator menu system has been completely redesigned in this release. Some function menus are renamed to be consistent with the newly adopted terminology, some are combined for merged functions, and others are retired completely. All menus are reorganized around workflow tasks to align with Configurator process maps and are seamlessly built into the QAD .NET UI Application panel.

Detailed menu changes are listed as follows:

Old Menu in 4.4.1	New Menu in 5.0	Change
Menu	Configurator	Renamed
QAD Configurator Setup Menu	Configurator Setup	Renamed
Group Maintenance	Master Group Maintenance	Renamed
Copy Function	Configurable Item	Renamed
Knowledge Base Menu	Sales Configuration	Renamed
Variables + Features	Variables/Features and Options	Renamed
Variable Option Maintenance	Variable Maintenance	Combined
Feature Option Maintenance	Feature Maintenance	Combined
Rules	Sales Configuration Rules	Renamed
Rule-Group Maintenance	Rule-Group Maintenance	Combined
'Rule-Group' Rule Maintenance	Rule-Group Maintenance	Combined
Rule Report	Sales Configuration Rule Report	Combined
Rule Table Report	Sales Configuration Rule Report	Combined
Analyser	Configuration Analyzer	Renamed
Result Key Maintenance	Configuration Key Maintenance	Renamed
Knowledge Exploitation Menu	Product Configuration	Renamed
COP Maintenance	Product Configuration Rules	Split into Variant Item Number Rule Maint, Variant Item Data Rule Maint, Variant Prod Struct Rule Maint, and Variant Routing Rule Maint

Old Menu in 4.4.1	New Menu in 5.0	Change
	Variant Item Number Rule Maint	New
	Variant Item Data Rule Maint	New
	Variant Prod Struct Rule Maint	New
	Variant Routing Rule Maint	New
COP Report	Product Config Rule Report	Combined
COP Rule Table Maintenance	Product Config Rule Report	Combined
COP Detail Rule Table Maintenance	General Prod Struct Rule Maint	Renamed
	Variant SO Line Rule Maintenance	New
	Variant SQ Line Rule Maintenance	New
COP Rule Table Report	Product Config Rule Report	Renamed
COP External Entity Maintenance	External Entity Rule Maintenance	Renamed
COP Batch Compiler	Batch Compiler	Renamed
Cross Validation Analyser	Cross Validation Analyzer	Renamed
System Management Menu	Administration	Renamed
Model Management Menu		Obsolete
Create Data Package	Model Import/Export	Combined
Load QAD 2008 - Standard Data	Model Import/Export	Combined
Load QAD Configuration Data	Model Import/Export	Combined
Archive Results	Configuration Delete/Archive	Renamed
Manual Result Maintenance	Manual Configuration Maintenance	Renamed
Questionnaire	Configuration Questionnaire	Renamed
Result/Configuration Report	Configuration Report	Renamed
QAD Configurator Parameter Maintenance	Configurator Control	Renamed
Generalised Code Maintenance		Obsolete
Generic Item Maintenance	Configurable Item Maintenance	Renamed
Item Number Change	Configurable Item Number Change	Renamed
Data-Dictionary/Xref Report		Obsolete
Element Roll-Up Maintenance	Element Roll-Up Rule Maintenance	Renamed
Item Element Roll-Up	Element Roll-Up	Renamed
Message Report		Obsolete
Active User Manager		Obsolete
Nomadic		Obsolete
Process Upload		Obsolete
Make Download		Obsolete
Force Download		Obsolete
QAD Configurator Report Menu		Obsolete
Question Type Report		Obsolete
Nomadic Report		Obsolete

Major UI and Functionality Changes

QAD Configurator has undergone numerous and significant changes across the board to provide the following benefits:

- Improved usability with less learning curve

- Enhanced productivity with streamlined workflow
- Quick and easy access to all relevant information
- Similar look and feel to that of QAD Enterprise Applications

For some Configurator functions, this means more consistent and intuitive user interface with little changes in functionality—you can still perform the same tasks using these functions but in different ways. For some other functions, major functionality changes have taken place, and a number of functions are now obsolete.

Record Maintenance Functions

There are significant changes in the way you maintain records in all record maintenance functions, such as in Variable Maintenance, Question Type Maintenance, and Master Group Maintenance. You now use the Delete button on the Configurator application toolbar to delete records and create new records by either clicking the New button at the lower bottom of screen or entering a new record ID and then pressing Enter or Tab. Previously, you used a command panel to perform these tasks.

Comment Tab

Most record maintenance functions in QAD Configurator now provide a Comment tab that lets you create additional notes in different languages.

Variant Data Types

Variant data types are now changed to: numeric, text, numeric list, date, logical and element.

Variable Maintenance

The original Variable Option Maintenance function is now merged into the Variable Maintenance function. You can now maintain variable attributes as well as variable options in this function.

- The Mandatory check box is now obsolete.
- The Monitor check box is now obsolete.
- The Infinite check box is now obsolete. Leaving the Minimum and Maximum fields blank denotes infinite value.

Feature Maintenance

The original Feature Maintenance and Feature Option Maintenance functions are now merged into the Feature Maintenance function. You can now maintain feature attributes, options, and sequences in this function. Also, features are now classified by function groups.

Feature Sequence Maintenance

An Analyzer button is provided to let you perform sales configuration rules analysis directly from this function.

Syntax Check

A new Check Syntax button replaces the original syntax check check box for you to perform rule validation.

Rule Assistant

When you compose a rule, you are now provided with a hideable Rule Assistant panel to help you enter valid rule elements. Previously, you accessed similar functions by selecting element windows from the View menu.

Configuration Key Maintenance

The Automatically Update Result check box has now removed.

Model Import/Export

The following three functions from the previous release are now combined into one Model Import/Export function:

- Create Data Package
- Load QAD 2008 Standard Data
- Load QAD Configurator Data

COP Maintenance Function Replaced

The COP Maintenance Function has been replaced by the following separate new functions:

- Variant Item Number Rule Maintenance: Use this function to define how QAD Configurator assigns item numbers to new variant items.
- Variant Item Data Rule Maintenance: Use this function to assign values to database fields in newly created variant items.
- Variant Product Structure Rule Maintenance: Use this function to define selection and assignment rules for component items in the generic product structure.
- Variant Routing Rule Maintenance: Use this function to define selection and assignment rules for operations in the generic routing.

The COP Sales Order Line and Sales Quote Line maintenance functionality, which was disabled in prior releases, has now been removed.

Variant Item Number Rule Maintenance

The new Variant Item Number Rule Maintenance now offers a much more user-friendly way to maintain variant item numbers than that was used previously in COP Maintenance

Product Configuration Rule Report

The COP Report and COP Rule Table Report functions are now combined into a new Product Configuration Rule Report function.

General Product Structure Rule Maintenance

The COP Rule Table Maintenance and COP Detail Rule Table Maintenance functions are now combined into a new General Product Structure Rule Maintenance function.

Rule-Group Maintenance

The Rule-Group Rule Maintenance function is now combined into the Rule-Group Maintenance function. You can now use this function to maintain rule groups as well as linking general rules to rule groups.

Item Rule Maintenance

The Item Rule-Group Maintenance function is now combined into the Item Rule Maintenance function. You can now use this function to link general rules, rule groups, and item-specific rules to specific configurable items. You can also preview rule details in this function.

Rule Table Generation Wizard

When you create a rule table, a new rule table generation wizard now guides you step by step through the process of generating a new rule table from scratch. After a rule table is generated, you can also use the generation wizard to modify the rule table.

Sales Configuration Rule Report

Rule Report and Rule Table Report are now combined into one Sales Configuration Rule Report. You can choose which type of report you want to run from one screen.

Product Configuration Rule Report

COP Report and COP Rule Table Maintenance are now combined into one Product Configuration Rule Report.

Multiple Languages Support

Progress Translation Manager is no longer used for compiling Configurator for multiple languages. QAD Configurator now uses the QAD Enterprise Application infrastructure for label and message translation.

Variant Product Structure Rule Filter

In the variant product structure rule filter, the Phantom Items option is changed to Include Phantom Items with new filtering logic: Clear this check box to exclude phantom items when displaying specified P/M types of items; otherwise, select this check box. The corresponding selection criterion option in Master Group Maintenance is changed as well.

Customizing the Configuration Process

You can now customize the configuration process using the Show Existing Configurations option in Configurable Item Maintenance. Its value determines whether and how the Existing Configurations screen is displayed in the Configurator questionnaire:

- First: Display existing configurations on launching the questionnaire.
- Second: Display the new configuration on launching the questionnaire.
- On request: When launching the questionnaire, display a message asking the user whether to show existing configurations.
- No: Hide the Existing Configurations tab in the questionnaire.

Browse Code

A new Browse Code field is now available in Variable Maintenance. When you define details for text type variables, you can select Allow Fill-In and then specify a browse code to associate the variable with an existing browse so that the question respondent can select a value from the browse instead of manually typing in an answer in the questionnaire.

Variant SO Line Rule Maintenance

A new Use Variant SO Line Rule Maintenance function lets you define assignment rules for a configurable item to assign values to sales order details fields of newly created variant item records.

Variant SQ Line Rule Maintenance

A new Variant SQ Line Rule Maintenance function lets you define assignment rules for a configurable item to assign values to sales quote details fields of newly created variant item records.

Release Notes for Release 4.4.2

QAD Configurator Version: 4.4.2

Release Date: April 2009

QAD Product Suite Compatibility: eB2.1 SP4, QAD 2007, QAD 2007.1, QAD 2008 Standard, QAD 2008.1 Standard

Note During the product life cycle, QAD changed the name of the former MFG/PRO eB2.1 product to QAD 2008 Standard. Individual releases of QAD 2008 Standard are identified by a decimal number; for example, QAD 2008.1 Standard. (The Service Pack 5 and 6 releases were branded as QAD 2007 and QAD 2007.1, respectively.) The Enterprise Financials version of the product is called QAD 2008 Enterprise and follows the same convention of identifying individual releases with a decimal number.

These release notes describe the most significant changes and fixes introduced with this version of QAD Configurator.

QAD Configurator 4.4.2 is a maintenance release of the 4.4.1 version. All 4.4.x releases of Configurator only support GUI and feature the web-based questionnaire while the 5.x releases fully support the QAD .NET UI. This release includes the following changes and fixes:

- Fixed the German language data file.
- API errors are now recorded in the WebSpeed log file instead of in separate files.
- Fixed the Progress error during the load package process.
- Fixed the No sod_det error that occurred during the process of answering the .NET UI questionnaire.
- The Analyzer now displays clear and precise error messages when the questionnaire path and variant item number are not set.
- Enhanced the web-based questionnaire to support rule tables.
- Fixed an error in rule table linear interpolate calculations.
- Added rule table descriptions to the Help icon in the web-based questionnaire.
- The system now displays a warning message and exits the web-based questionnaire when the generic item is not analyzed.
- A ubroker sample file is provided for reference during the installation process.
- Added the Configurator .NET UI plug-in for .NET UI 2.5.3.
- The system has been modified so that only the last rule table rule involving default values are applied.
- Rule and rule table errors are fixed for the German language version.
- Performance of Analyzer and questionnaire loading has been improved.
- Remote Analyzer on the AppServer is now available.
- A set of proxy files have been added to allow local calls to the service APIs for performance improvement.
- Fixed character issues in answer-all XML requests.
- Added the summary report function in the summary page of the .NET questionnaire.
- Rounding method errors have been fixed.
- Variant directory changes are now automatically applied to variant file generation.
- Locked configurable items are now checked by the system.
- Summary report print errors have been fixed.
- Script errors that occurred when the configurable item is locked have been fixed.

- Feature search criteria can now be properly displayed on the first page of the web questionnaire.
- You can now configure pt_pm_code in product configuration rule maintenance.
- The feature option browse has been implemented.
- Non-ISO characters are now encoded in URL using utf-8.
- A progress bar indicating the progress of creating new configurations or reloading existing configurations has been added.
- Web questionnaire has been modified so that expired price lists cannot be selected.
- The browse button on the web questionnaire is now hidden when the browse is not available.
- The sales order and sales quote line rules are enabled.
- The duplicated rule check issue has been fixed.
- A random URL parameter v has been added to disable the web browser cache.
- The “** Incompatible data types in expression or assignment. (223)” error has been fixed.
- Clicking a blank area now no longer causes a pricing window to pop up unexpectedly.
- The questionnaire now displays configuration description in the existing configurations list.
- The error that makes you unable to return to the Existing Configurations tab in some occasions has been fixed.
- Variant Item has been added as a new search criterion for searching existing configurations.

Release Notes for Release 4.4.1

QAD Configurator Version: 4.4.1

Release Date: July 2008

QAD Product Suite Compatibility: QAD 2007, QAD 2007.1, QAD 2008 Standard

Note During the product life cycle, QAD changed the name of the former MFG/PRO eB2.1 product to QAD 2008 Standard. Individual releases of QAD 2008 Standard are identified by a decimal number; for example, QAD 2008.1 Standard. (The Service Pack 5 and 6 releases were branded as QAD 2007 and QAD 2007.1, respectively.) The Enterprise Financials version of the product is called QAD 2008 Enterprise and follows the same convention of identifying individual releases with a decimal number.

Related Documentation: *User Guide: QAD Configurator* (item 78-0733A); *Installation Guide: QAD Configurator* (item 78-0732B)

These release notes describe the most significant changes and fixes introduced with this version of QAD Configurator.

- Translated German language menus and labels have been updated for this release.
- The Questionnaire module now supports QAD .NET UI 2.5.3 as well as QAD .NET UI 2.7.
- A ubroker.properties.sample file is provided for your reference when you edit the ubroker.properties file during installation.
- The installation script has been modified to correctly load data packages when you upgrade Configurator from a previous release.
- When the questionnaire directory or variant directory is not set up in Parameter Maintenance, the system now displays a specific error message. Previously, no specific description of the error was provided.
- The .NET UI Questionnaire module has been modified to support rules defined using rule tables and rule table rule descriptions are also provided in question help in Questionnaire.
- The system has been modified to correctly generate records in the QAD ERP system when variant items are generated.

Release Notes for Release 4.4

QAD Configurator Version: 4.4

Release Date: April 2008

QAD Product Suite Compatibility: QAD 2007, QAD 2007.1, QAD 2008 Standard

Note During the product life cycle, QAD changed the name of the former MFG/PRO eB2.1 product to QAD 2008 Standard. Individual releases of QAD 2008 Standard are identified by a decimal number; for example, QAD 2008.1 Standard. (The Service Pack 5 and 6 releases were branded as QAD 2007 and QAD 2007.1, respectively.) The Enterprise Financials version of the product is called QAD 2008 Enterprise and follows the same convention of identifying individual releases with a decimal number.

Related Documentation: *User Guide: QAD Configurator* (item 78-0733A); *Installation Guide: QAD Configurator* (item 78-0732A)

These release notes describe the most significant changes and fixes introduced with this version of QAD Configurator.

Questionnaire .NET User Interface

In this release of QAD Configurator, the Questionnaire module features a whole new .NET user interface that is integrated with QAD 2008 Standard using QAD .NET UI 2.7. It performs the same functions as the Questionnaire Windows user interface but has a more intuitive and consistent look and feel and offers richer data search and browsing capabilities.

Note Users of earlier versions of QAD Enterprise Applications can continue to use the Windows GUI version of the questionnaire. The .NET UI version is only available to users who install QAD 2008 Standard.

Multiple-Domain Support

This release of QAD Configurator provides true support for multiple domains in the QAD 2008 Standard application. Previously, you needed to install a new Configurator instance for each domain.

Functional Group Maintenance

A new Functional Group Maintenance function is provided in this release to categorize variables and features.

New Variant Item Numbering Component

You can now use alphabetically sequenced characters as a part of the variant item number when defining the variant item number formats in COP Maintenance.

Corrections to Existing Features

- 6 The system now correctly calculates the prices of sublevel components in a multilevel generic item where the component features are quantity based but corresponding variables are not.
- 7 Physical and logical names of QAD ERP and CPD databases QAD Configurator connects to are no longer hard coded in the system. Previously, QAD Configurator failed to connect to QAD ERP and CPD databases whose physical and logical names were different from the hard-coded values.

- 8 The system has been modified to change the pcpt_rcode field value when loading data from a dumped package file to prevent identical pcpt_rcode field values in the same instance.
- 9 Gratuitous error messages no longer display when running the Where-Used report.
- 10 The system now handles numeric variables correctly when using European numeric formats.
- 11 You can now create general rules using the free and advanced formats in the German language version of QAD Configurator.

Release Notes for Release 4.3.1

QAD Configurator Version: 4.3.1

Release Date: September 2007

MFG/PRO Compatibility: MFG/PRO eB2 and eB2.1; QAD Enterprise Applications 2007 (QAD 2007)

Note Effective with Service Pack 5, MFG/PRO eB2.1 has been renamed QAD 2007. Release Notes references to MFG/PRO also apply to QAD 2007.

Related Documentation: *User Guide: QAD Configurator* (item 78-0640A); *Installation Guide: QAD Configurator* (item 78-0641A)

These release notes describe the most significant changes and fixes introduced with this version of QAD Configurator.

Fixes

- 1 When you define rules with a large number of variables, the system no longer displays a Progress error message related to a 32 KB limit.
- 2 Several issues related to Questionnaire have been fixed:
 - a A pricing browse is now always available when you select Pricing Info. Previously, the Pricing block was grayed-out under some circumstances.
 - b Entries in the Status column have been clarified as shown in the following table:

Status	New Code	Previous Code
Error	Error	**
Automatically Answered	A-Answer	Ar
Manually Answered	M-Answer	Ar
 - c In some cases, you could not complete a configuration in which a dependent feature was left with a single option if the dependent feature option had Mandatory set to Yes and the standard options were set to No. In this release, feature options display correctly in that situation.
 - d When you exclude a single option as part of a rule, the system no longer incorrectly populates the answer column with the literal string from the exclusion definition.
 - e When you use exclusion-based rules, the system now builds the exclusion list correctly. Previously, the last exclusion found replaced the list, instead of being appended to it—leading to incorrect results, such as having the incorrect default answer.
 - f An incorrect warning message (Not all questions are answered. Continue?) no longer displays when all questions have been answered. This sometimes resulted because a price could not be calculated correctly for some multi-level generic items—which also caused a ** tprice record not on file error to display in Sales Order Maintenance.
 - g Costs are now rolled up correctly to all levels when an item is configured. Previously, cost roll-ups were not always done correctly for three-level structures.
- 3 COP Batch Compiler now works correctly with various combinations of parameters defined in QAD Configurator Parameter Maintenance. Previously, some combinations of valid parameters caused the compiler to fail and display error messages.

- 4 QAD Configurator has been modified to create the correct lines in Sales Order Maintenance and the correct structures in Product Structure Maintenance when a configured item includes phantoms nested within the product structure.
- 5 The Load MFG/PRO Data function has been fixed so that it now loads data correctly without displaying Progress error messages.
- 6 Multi-line sales quotes and sales orders now have all the line-item fields populated correctly when the structure includes phantoms. Previously, in some cases the first line was correct, but subsequent lines had incorrect or missing data in some fields.
- 7 Item Rule Maintenance no longer displays a `Duplicate variable name--pologon` error message when you save a new rule.
- 8 Some programs—including those used to define and maintain rules—previously displayed an error message and hung up the application if parent and child windows were closed in a certain sequence. The current release fixes that problem.
- 9 The following issues have been corrected involving Message Report:
 - a Missing default records have been added to the `pra_ctrl` table. Previously, the missing records caused Message Report to display error messages such as `RELEASE NUMBER NOT DEFINED`.
 - b The report file generated from Microsoft Word now correctly displays QAD as the company name.