

QAD Demand and Supply Chain Planning 2017 Release Notes

April 2017

These release notes include information about QAD Demand and Supply Chain Planning (DSCP). These changes may affect the way you implement and use QAD DSCP. Review this document before installing the new QAD DSCP release.

QAD highly recommends that you implement the latest QAD DSCP release available. Check the QAD Online Support Center to make sure you have the latest QAD DSCP release notes, installation guide, and installation media:

<http://support.qad.com/>

Use the following list to find a specific release:

Release Notes for Current Release 2

Release Notes for QAD DSCP 2016 Release 7

Release Notes for 7.3 Release 13

Release Notes for 7.2 Release 18

Release Notes for Current Release

QAD Version: QAD DSCP 2017

Release Date: April 2017

User Guide: The user guide for this release will be available, on request, at a later date.

Languages Supported: French, English, German, Spanish, Italian, Polish, and Simplified Chinese.

UI Changes

Simplified Chinese

With DSCP 2017, the standard objects and interface are available in Simplified Chinese.

Fig. 1

Example of a Workspace with Simplified Chinese as the Application Language

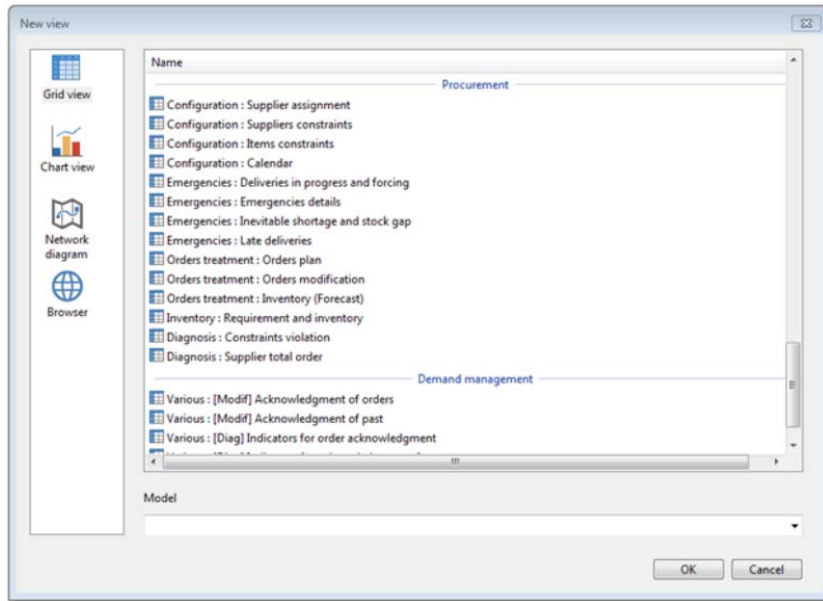


View Templates

QAD DSCP 2017 offers more than 70 view templates. The majority of these templates are grids, but graphs are also available.

The view templates cover all the planning modules of the DSCP suite.

Fig. 2
Examples of New View Templates Available in DSCP 2017



Create Views from Ribbon Using View Templates

You can create views using view templates directly from the ribbon.

Click the dedicated button in the ribbon; select the view type and the view template. Link the view to the model from which you want to display data.

The view template includes pre-selection of data fields and display settings that allow you to quickly create a view that displays accurate data fields with a relevant configuration, according to a calculation setup or a specific planning process step.

Display and Search Features in Page Elements

Now it is easier to display or hide the names of page elements and to find elements in page dimensions.

To display the name of the dimensions positioned in page, open the View Management window, and select **Display dimensions name** in the Order of dimensions tab.

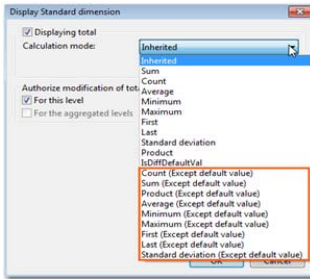
Standard Data Table for Flow Charts

With DSCP 2017 you can create a standard data table that contains all the standard data fields required to create a flow chart diagram. The flow chart that you create with these standard data fields is compatible for display in a web workspace.

New Aggregation Rules for Total Calculations

You can use new aggregation rules, excluding default values. With these aggregation rules you can achieve better results in total calculations. You can define the aggregation rule as the default rule for the data field or for a specific view.

Fig. 3
New Aggregation Rules Excluding Default Values



Text Search in Macros and Rule Bases

You can search macros and rule bases for a specific text. The search function displays a list of objects that include the required text. You can easily locate the corresponding object from the list.

QAD DSCP Web Portal Improvements

Rich and Responsive Layout

The DSCP Web Portal in 2017 version offers a rich and responsive layout.

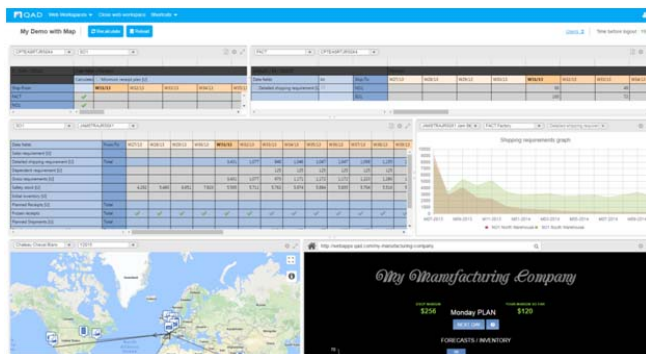
You can now display multiple views in the same web workspace. The views stack and resize dynamically according to the browser width. This behavior makes the Web Portal a very responsive and flexible tool for any kind of device and allows greater mobility.

Each view header allows you to complete independent actions, such as maximizing the view or interacting with Excel.

In addition, you now have direct access to shortcuts and workspaces from drop-down menus on the home page.

All of these developments comply with Channel Islands guidelines—providing consistency with the entire QAD product range.

Fig. 4
Example of Workspace in QAD DSCP 2017 Web Portal



Dynamic Chart and Map Components

The chart views in the web workspaces are now actual chart components, instead of images as in the previous version.

Advanced developments enable you to hide some of the chart components. Simply select the data field that you want to focus on.

In addition, interactive maps are a new component that you can integrate in your web workspace. These maps display product flows between sites, as well as site data and alerts. You can change the values and set up additional flows.

Browser views are also available in your web environment, allowing you to view external sites for information such as weather forecasts or the company intranet.

Planning Features

This release includes functional improvements in all planning modules, particularly in Demand Planning.

In the planning modules, most of the new developments derive from project experience and aim to bring best practices into the standard features of DSCP.

Safety Stock Model

The safety stock simulation is a component that is available in previous versions of QAD Demand Planning to calculate a safety stock level from the mean absolute deviation of the statistical forecast. With QAD DSCP 2017 you create this component independently on any data field, provided that the dimensions comply with some constraints.

When you create a safety stock model, you define the number of archives that you need. The setup of the required archive template and the creation of the calculation that feeds the safety stock model are automatic. The model includes the archive template and the calculations required to provide the safety stock simulation.

New Features to Monitor Statistical Forecast

In Demand Planning you can now set up the forecast calculation so that data fields you define, such as history size, determine the forecast method. You can compare the forecasts calculated with each chosen forecast method.

New data fields for frequency help you to manage intermittent demand.

There is a new forecast method that combines the moving average with family seasonality.

New Count Calculation

A new standard calculation is available that allows the counting of references that meet a defined condition within a group of references. For example, you count the number of items in Launch sale status within the Consumer Products family.

Planning Optimization and Control

The latest developments result in better performances in calculations and offer new analysis indicators.

For example, the impact of item substitutions on the forecast model calculations is reduced.

Additional data fields help you to monitor item substitutions. You can also now display the whole substitution chain on the same chart.

In Procurement Planning, new indicators and processes help you to combine orders and to manage your delivery and order plans by order date.

New data fields are now integrated as standard to analyze procurement and distribution plans.

Integration and Architecture

Developments allow better integration and higher performances.

Additional Archiving Features

You can archive data fields of text type. You can also archive comments associated with value entries, whatever the archive type.

Concurrent Modeling

Concurrent modeling is also called parallel modeling. It allows several users to create objects and modify the dataset structure at the same time.

This release includes the latest developments and allows more actions; for example, you can now add master tables and conditions to the hierarchy at the same time.

Release Notes for QAD DSCP 2016 Release

QAD Version: QAD DSCP 2016

Release Date: April 2016

User Guide: The user guide for this release will be available, on request, at a later date.

Languages Supported: French, English, German, Spanish, Italian, and Polish

UI Changes

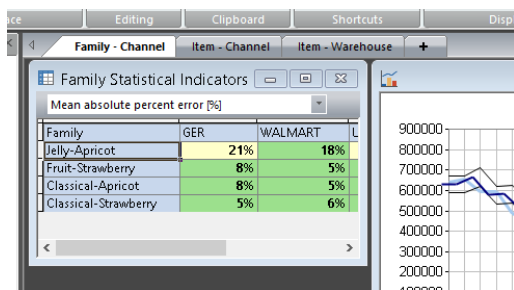
Workspace Tabs

In QAD DSCP 2016, you can use tabs in your workspaces. Tabs replace pyramid views, and offer you greater flexibility in grouping and arranging views.

The usability of tabs is very intuitive. Using a right-click menu, you can create, rename, or delete tabs. Additionally, you can move tabs by dragging and dropping them. You also move or copy views from one tab to another easily and quickly.

Fig. 5

Example of Workspace with Tabs



Tabs and Migration

When you migrate to QAD DSCP 2016, your existing pyramid views are retained as they are, and you can keep them, if needed. However, you can no longer change the configuration of your pyramid views. As a result, QAD recommends that you convert your pyramid views to tabs.

To convert a pyramid view to a tab, click the Tabs button in the Ribbon and specify the position for the tabs at the top or bottom of the workspace. Each pyramid level is converted to a tab. The set of views and their layouts remain unchanged.

Creating Views from the Ribbon

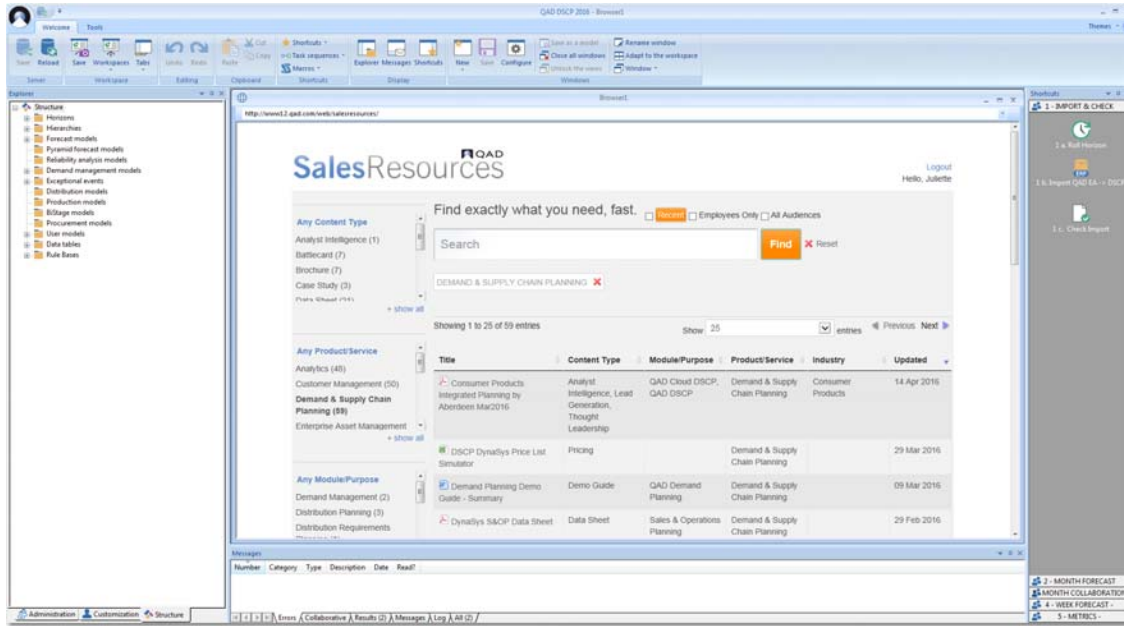
You can now create views directly from the Ribbon, which avoids the need to display the Explorer. A dedicated button for creating views is available on the Ribbon.

From the Ribbon, you can create grid views, chart views, network diagrams, and browser views.

Browser Views

Browser views are a new type of view available with QAD DSCP 2016. Using browser views, you can integrate a navigator view into your workspace. This feature is open to HTML5 and Java Script.

Fig. 6
Example of Browser View in a Workspace



You can use browser views as a basis for customized reports, or to enhance the way in which QAD DSCP data is displayed in the application. For example, you can build dashboards or include any element that meets your specific requirements.

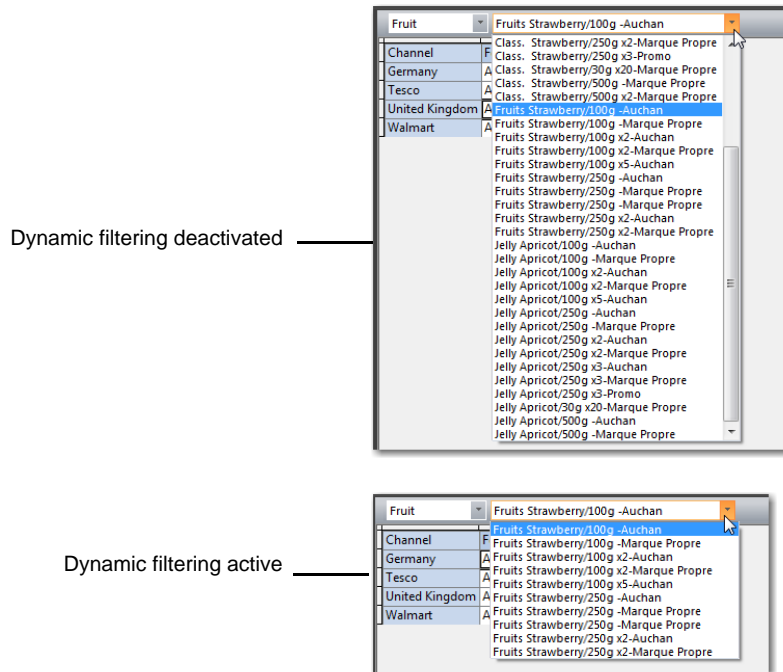
Dynamic Filtering

A new dynamic filtering option is included in the view configuration, and you can apply it to a dimension that you have split and that is positioned in page.

The element that you select in the left combo list acts as a filter that defines the elements in the right combos, displaying only the valid combinations.

To activate dynamic filtering, open the View Configuration window, and choose **Hide invalid combinations in pages** in the Order of dimensions tab.

Fig. 7
Example of Dynamic Filtering Option



In Figure 7, the upper graphic shows a drop-down list as it appears when dynamic filtering is deactivated. When you select Fruit in the combo list on the left, the drop-down list on the right displays all items, including items that are not in the Fruit family.

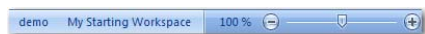
The lower graphic displays the drop-down list for the same view as it appears when dynamic filtering is activated. Now, when you select Fruit in the combo list on the left, the drop-down list on the right only displays items that include the word “Fruit.”

Adjusting the Zoom Level in the Status Bar

In QAD DSCP 2016, you can adjust the zooming factor from the status bar.

As in a Microsoft Office document, you can use a slider to zoom in or out, or you can increase the zooming factor using the + and – buttons. When you click the 100% area, a window opens in which you can set the zooming percentage.

Fig. 8
Zoom Slider in the Status Bar



Planning Features

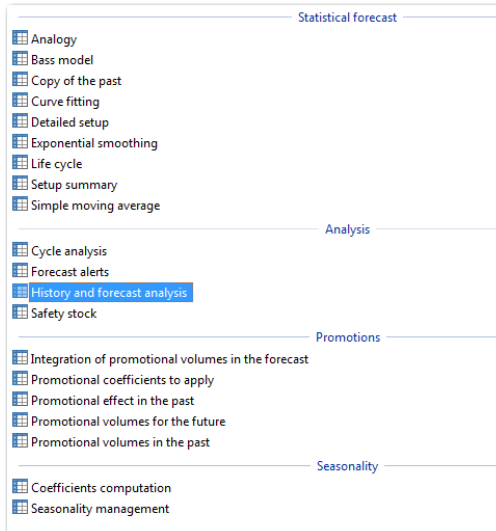
View Templates

QAD DSCP 2016 offers more than 60 view templates, most of which are grids, but some graph templates are also included. These view templates are additional to the small number of view templates available in previous versions of QAD DSCP.

View templates help you to benefit from QAD DSCP best practices and to avail of an embedded configuration assistant. Using a view template, it takes a few seconds to create a view with accurate data fields using the required configuration, according to a particular calculation setup or to a specific planning process step.

Some standard view templates are derived from the Ready to Plan database configuration.

Fig. 9
Examples of View Templates in QAD DSCP 2016 Demand Planning



View templates cover the Demand Planning, Production Planning, and Distribution Planning modules. View templates for the Procurement Planning modules are under construction.

Reliability Analysis Model

Reliability analysis is a component that was available in previous versions of QAD Demand Planning to assess the accuracy of the final forecast. In QAD DSCP 2016, you can create the reliability analysis component independently on any data field, provided that the dimensions comply with some constraints.

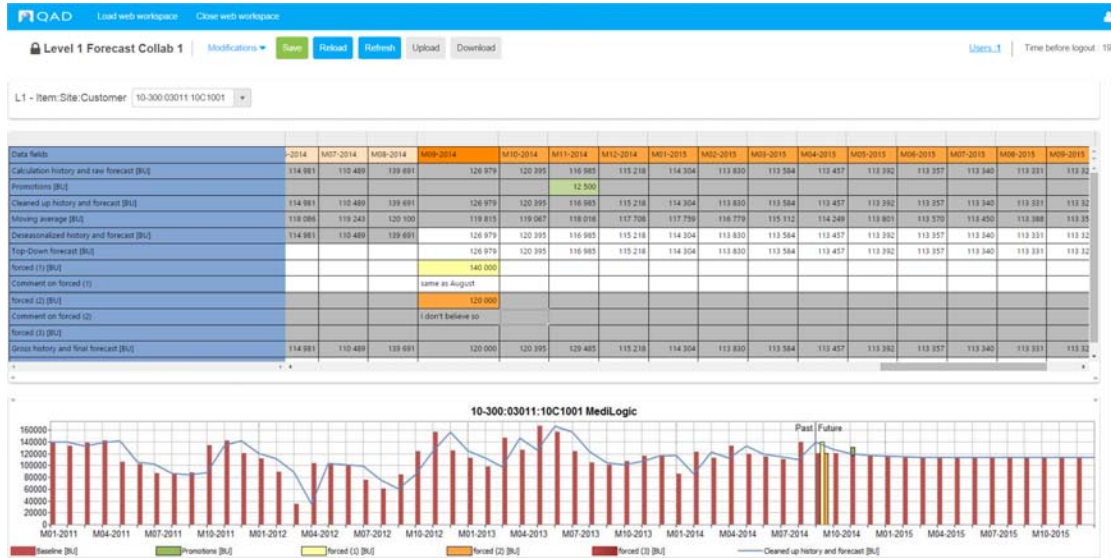
When you create a reliability analysis model, you define the number of archives that you need. The archive template setup and calculation that feeds the analysis model are created automatically. The model includes the archive template and the calculations required to provide accuracy analysis.

QAD DSCP Web Portal Improvements

New Web Portal Look and Feel

The 2016 version of the QAD DSCP Web Portal has a new look and feel that complies with QAD User Experience (UX) guidelines. The reworked QAD DSCP Web Portal layout is compatible with QAD Enterprise Applications.

Fig. 10
Example of Workspace in QAD DSCP 2016 Web Portal



Windows Authentication

When you connected to Windows, the QAD DSCP Web Portal now logs you in automatically using your Windows ID.

Web Portal UX Improvements

Search Feature

In the QAD DSCP 2016 Web Portal, the Search feature in the grid views is native, which means that it applies to the whole grid and not just to the rows displayed in the current Web page.

Compatibility

QAD DSCP Web Portal is now compatible with the I pad

Quality Improvements

New development in the QAD DSCP Web Portal provide increased stability.

Integration with QAD Enterprise Applications

Standard process and connection tools easily integrate QAD DSCP with QAD Enterprise Applications. Standard integration is now available for the Demand Planning and Production Planning modules.

The standard interface process retrieves data from QAD Enterprise Applications with SQL through ODBC queries.

The export from DSCP to QAD Enterprise Applications is performed using QXtend, which is a QAD application.

Technical Improvements

Concurrent Modeling

Concurrent modeling is also called parallel modeling, and ensures that several users can create objects and modify the dataset structure at the same time on the same model.

The latest enhancements and automated testing have increased the stability of concurrent modeling and you can now perform additional actions. For example, you can now duplicate a time fence group.

Additionally, some previous constraints no longer apply in situations where several users create or delete data fields in the same model simultaneously.

Better Performances in Calculations and Rule Bases

Now, several users can run MRP and DRP-MRP calculations at the same time, each with their own data. The impact is restricted to selected records, and the calculation no longer locks the whole dataset.

Development enhancements have reduced the memory consumption and execution time for rule bases.

Monitoring Tools

QAD DSCP 2016 offers two new monitoring tools to assess the performance of your settings: Data Field Compression and Performance Monitor. You can access these tools directly from the Ribbon.

Fig. 11

Monitoring Tools Available from the Ribbon



Select **Data Field Compression** to display a view that lists the data loaded and the last actions performed such as workspaces opened or calculations run.

Using this view, you can focus on implementation and see which objects you can optimize.

The **Performance Monitor** analyzes calculation execution time.

When you open a workspace or run a batch execution, select Performance Monitor to display the list of associated executed calculations, and their durations. This way, you can see which steps take more time than others. This tool is very useful in highlighting objects in need of improvement.

Technical Architecture

From QAD DSCP 2016, only 64-bit platforms are supported for use with QAD DSCP.

The minimum Windows operating system version that you can use with QAD DSCP is Windows 7, and the required server version is 2008 R2 or later.

Release Notes for 7.3 Release

QAD Version: QAD DSCP 2015 Demand Planning EOB 7.3

Release Date: February 2016

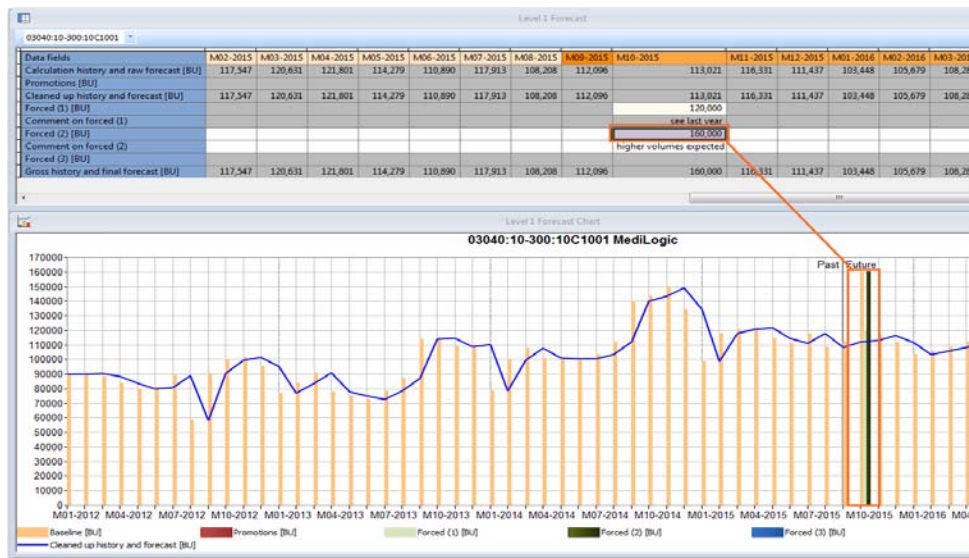
User Guide: *QAD Demand Planning 7.3 EOB*, item 70-3326-7.3

Languages Supported: French, English, German, Spanish, Italian, and Polish

Fixes

In the Collaborative 2 workspace, collaborative 2 user group viewing and editing rights were fully implemented. As a result, the demo 2 user can now display views and enter a forced forecast within the workspace.

Fig. 12
Collaborative 2 Workspace



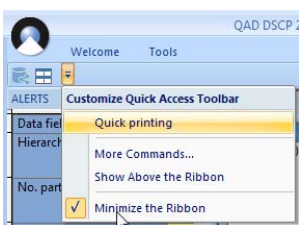
UI Changes

Ribbon Hidden in Preconfigured Workspaces

In preconfigured workspaces, the Ribbon is hidden by default to maximize the workspace area available for displaying planning views.

To display the Ribbon, click the small arrow on the right of the Quick Access toolbar, and clear the **Minimize the Ribbon** option.

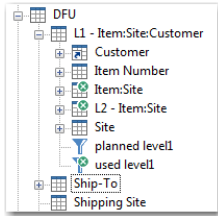
Fig. 13
Minimize the Ribbon Option



Renamed Master Tables

Several hierarchical master tables and objects have been renamed to better reflect how the tables and objects map to imported QAD Enterprise Applications data.

Fig. 14
Master Tables

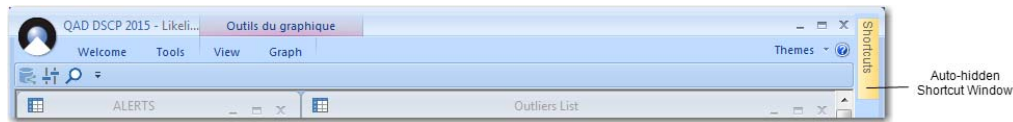


EOB Workspaces

Several workspaces have been reworked extensively in the EOB 7.3 database.

Many shortcuts are now located in the Quick Access tool bars, instead of in the Shortcut menu. This updated configuration allows you to hide the Shortcut menu to gain the maximum amount of space for positioning child views. The Shortcut menu is auto-hidden and you can display it by hovering the cursor over the Shortcut window name.

Fig. 15
Auto-Hidden Shortcut Menu



The EOB 7.3 database also includes new workspaces for managing the life cycle of items. Additionally, the workspaces dedicated to metrics are now separate from the Forecast process workspaces.

New text data fields let you record comments, which enriches user experience in the Review Forecast 1, Review Forecast 2, and Weekly Demand collaborative workspaces.

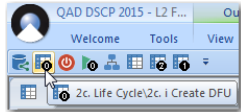
Fig. 16
Text Data Field

Data fields	M08-2014	M09-2014	M10-2014
Calculation history and raw forecast [BU]	139 691	126 979	120 395
Promotions [BU]			
Cleaned up history and forecast [BU]	139 691	126 979	120 395
forced (1) [BU]		120 000	
Comment on forced (1)		Promotion different from last September	

The EOB 7.3 database includes new Quick Access tool bars that include shortcuts previously located in the Shortcut menu. The Shortcut menu is easy to use and offers a clean vision of the Demand Planning process.

Most shortcuts are now available in the relevant workspaces so you no longer need to frequently display the Shortcut window.

Fig. 17
Shortcut for Creating DFUs



Interfaces with QAD Enterprise Applications

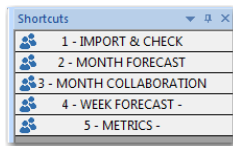
The EOB 7.3 database includes new features that facilitate integration with QAD Enterprise Applications. The standard EOB processes now simplify the import and export processes from and to QAD Enterprise Applications.

Planning Features

Simpler Demand Planning Process Menu

The reworking of workspaces and shortcuts has resulted in a refined Demand Planning Process menu in the Shortcut window.

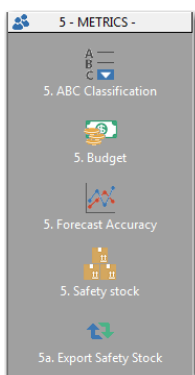
Fig. 18
Shortcut Menu



A dedicated workspace includes the views required to clean the sales history, before you calculate and adjust the forecast.

A new Metrics shortcut menu separates the Metrics views from the Forecast Process workspaces.

Fig. 19
Metrics Shortcut Menu



Weekly Forecast Enhancements

Weekly Split Calculation

A new calculation splits the forecast from monthly buckets to weekly buckets.

The principle of the calculation is as follows:

- Depending on the month, the monthly forecast is split into four weeks or five weeks.
- The Monday determines the month to which a week belongs. Therefore, a week that overlaps two different months is considered to be fully within a single month, regardless of the number of days in the month.
- By default, the monthly forecast is then spread evenly over the four or five weeks.
- Use the data fields Forced weight week 1, Forced weight week 2, and so on to manually force the weight of any of these weeks.

If needed, QAD Demand Planning readjusts the week weights to ensure that the monthly total is exactly 100%, and applies these coefficients to every week in the horizon.

A new Pegging view displays the calculated weekly numbers and adjusted weekly weights to facilitate understanding of the numbers attributed in the weekly forecast split.

Recording Comments on Promotions

A new text data field lets you enter free-text comments regarding promotions.

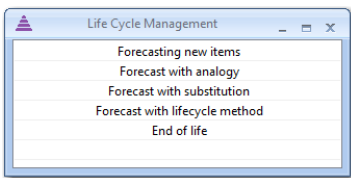
Managing Item Life Cycles

A specific workspace is now dedicated to the management of item life cycles.

Several sets of views allow you to analyze all stages in an item life cycle and to manage them. You can:

- Assign a forecast to new items
- Define forecasts using the substitution method
- Define forecasts using the analogy method

Fig. 20
Life Cycle Management Menu



You can now manage an item's end of life using the following new data fields in QAD DSCP 2015:

- Immediate end
- Forced end date
- End of life date with volume to exhaust

Managing Safety Stock

A new workspace is dedicated to the management of safety stock.

This workspace makes it easier for you to compare the safety stock calculated in QAD DSCP with the safety stock imported from QAD Enterprise Applications.

New data fields allow you to force the safety stock value to export to QAD Enterprise Applications, and to select the safety stock values exported.

Fig. 21
Safety Stock Management View

Item Number	Safety stock split from L2 [BU]	Lead time from import [Standard Days]	Computed safety stock [BU]	Safety stock from import [BU]	Safety stock difference [BU]	Safety stock deviation [%]	Forced safety stock [BU]	Safety stock to export [BU]	Export safety stock
03011	41,174	15.0	34,980	45,000	10,420	23.16%		34,980	<input type="checkbox"/>
03012	77,768	15.0	65,313	65,000	-313	-0.48%		65,313	<input type="checkbox"/>
03013	39,962	12.0	30,033	28,500	-1,533	-5.38%		30,033	<input type="checkbox"/>
03021	205,994	15.0	173,002	170,000	-3,002	-1.77%		173,002	<input type="checkbox"/>
03022	38,400	21.0	38,158	45,000	6,842	15.20%		38,158	<input type="checkbox"/>
03023	33,703	30.0	40,029	60,000	19,971	33.28%		40,029	<input type="checkbox"/>
03033	84,416	15.0	70,896	88,500	17,604	19.89%		70,896	<input type="checkbox"/>
03040	20,288	15.0	13,047	18,750	1,703	9.08%		13,047	<input type="checkbox"/>
03041	66,579	15.0	55,015	55,400	-385	-0.70%		55,015	<input type="checkbox"/>
03042	72,584	10.0	49,773	75,000	25,227	33.64%		49,773	<input type="checkbox"/>
03043	37,662	20.0	36,523	38,500	1,977	5.14%		36,523	<input type="checkbox"/>
03090	55,099	15.0	46,274	56,000	9,726	17.37%		46,274	<input type="checkbox"/>

A new shortcut lets you export the selected safety stock values to QAD Enterprise Applications using one click.

Release Notes for 7.2 Release

QAD Version: QAD DSCP 2015 Demand Planning EOB 7.2

Release Date: March 2015

User Guide: *QAD Demand Planning*, item 70-3326-7.2-Rev 1

Languages Supported: French, English, German, Spanish, Italian, and Polish

User Interface Changes

In QAD Demand Planning 7.2, the graphical interface has been extensively updated and offers increased flexibility for configuring views and workspaces. The aim of these new developments is to create a better user experience.

Ribbon

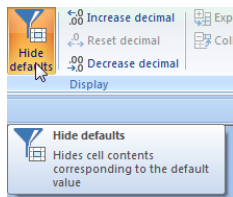
Fig. 22
Ribbon Menu



A new *ribbon* replaces the previous menus and toolbars, and the layout is now closer to Microsoft Office standards, which makes the application easier to work with. In the ribbon, button and menu bars display in different ways, depending on the current view type and the current action.

When you hover the mouse over an icon, a tool tip displays a short description of the menu item.

Fig. 23
Tool Tip



You can set the ribbon to be minimized.

Customization

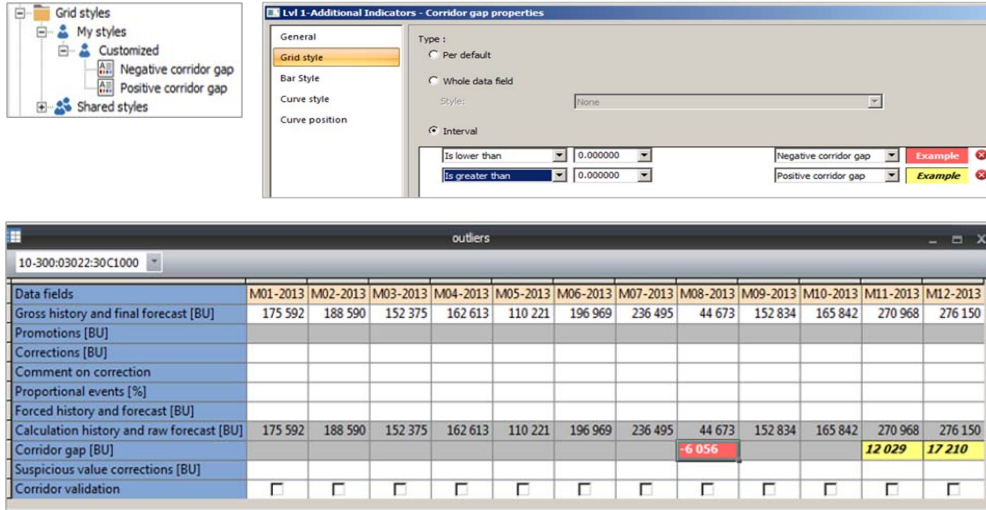
Display Options

You can now hide the default values in grid views to gain immediate access to relevant data.

You can also create customized styles for alerts, or for any relevant data field. This feature makes it easier and quicker for you to detect suspicious values, or to view data fields that are most relevant to you.

In the following example, additional styles were created to distinguish between corridor gaps with negative values and corridor gaps with positive values.

Fig. 24
Example Showing Additional Styles



As a result of the new UI changes, you can also:

- Include a read-only feature in a style definition.
- Define a style depending on the value of the current data field or on the value of another data field.
- Create as many styles as you want, with unlimited value ranges.

Configuring Views and Workspaces

QAD Demand Planning now includes the ability to set side panels as auto-hidden, which means that the panels only display when you hover the cursor over them.

A new magnetism feature allows you to set up the magnetism strength to easily position views within the workspace.

QAD Demand Planning includes two new field types: Date and Text. The Date type replaces the list of periods in previous version of QAD Demand Planning. The Text data field type lets you enter free text within a cell. For example, you can now enter a comment to explain a data correction that you made.

When configuring a view or a calculation, you can now select data fields from separate models, which facilitates data field selection.

QAD Demand Planning now lets you rename and translate objects and views quickly.

Quick Access Toolbar

Use the new Quick Access toolbar to launch one-click functions or shortcuts that you have chosen to include. The only default button in the Quick Access bar is the Save command. By default, the Quick Access toolbar is located on the top left of the environment, above the ribbon. You can also position it under the tape, which then allows you to display all the button bars simultaneously.

In the menu, choose Show Below the Ribbon to move the Quick Access toolbar under the button ribbon.

Accessing Help

QAD Demand Planning now allows you to access the online help for a data field or calculation directly from the grid header, or from the browser. As a result, you can now reach the information you require easily and quickly. You can also open the online help from the ribbon.

When you receive an error message about a calculation, you can now locate the corresponding calculation directly from the message.

From a grid header, you can open a summary view of all standard data fields, which displays useful information about the data field dimensions, default value, unit of measure, and so on.

Web Portal

The Web Portal was introduced in QAD Demand Planning 7.1, and is a collaborative tool, accessed through the Internet. The Portal is designed to enable users to share and view demand planning information, even when they are away from the office.

A number of enhancements were made to the Web Portal in QAD Demand Planning. The Web workspaces have been enriched and you can now view real charts instead of pictures.

You can now open several workspaces in different tabs to, for example, quickly compare data.

Using the Web client, you can now export a grid to an Excel file, work separately in Excel, and then upload the updated values and comments back to QAD Demand Planning.

When connected, you can see what users are currently using QAD Demand Planning, and can share instant messages with all connected users.

All these features make QAD Demand Planning a highly collaborative tool, with multi-access and multi-users features.

Planning Features

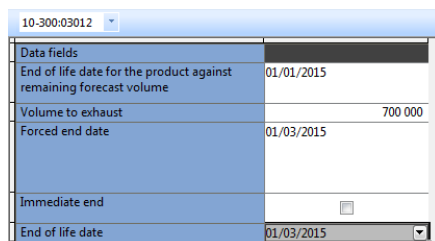
End of Life

QAD Demand Planning includes new data fields for managing the end of life for an item.

You can force the item end of life immediately or at a specific date, and you can combine the end of life date with a sales volumes to use up before phasing the product out.

The Global setup data table of the forecast model contains the new end of life data fields.

Fig. 25
Global Setup Table



10-300:03012	
Data fields	
End of life date for the product against remaining forecast volume	01/01/2015
Volume to exhaust	700 000
Forced end date	01/03/2015
Immediate end	<input type="checkbox"/>
End of life date	01/03/2015

Demand Planning Data Fields

QAD Demand Planning now includes a new KPI: Average of calculation history. This indicator, which is very useful for analysis purposes, is now available as standard.

The Forced cycle total data field now follows the standard Demand and Supply Chain Planning (DSCP) forcing rules. The forcing becomes effective as soon as you enter a Forced cycle total value.

Promotional Events

QAD Demand Planning includes a new option for promotional events. The Promotion Effect Estimate option lets you calculate promotion volumes from sales history, instead of entering the values or retrieving them from events tables. To use the Promotion Effect Estimate option, you specify the items and periods in the past where a promotional event was ongoing. Within these periods, the gap between the archived baseline and actual sales is calculated as the promotion effect.

At the same time, the calculation history is automatically cleaned of exceptional values. The calculation history without promotional data is then input to the forecast calculation. After the raw forecast is calculated, you can use the promotional effect to automatically define the promotional volumes for future events.

You need to specify the references and periods for which an exceptional event is scheduled in the future. This information probably comes from people external to Demand Planning. The process of involving several people in Demand review is called Collaborative forecasting.

You can use the promotion effect calculated at item level, or at item group level. This way you can estimate the promotion effect for a new item with no history, deducting it from the group the item belongs to.

