QAD Field Service Scheduler Release Notes

September 2012

These release notes include information about the latest QAD Field Service Scheduler (QAD FSS) fixes and changes. These changes may affect the way you implement and use QAD FSS.

Important Review this document and the QAD FSS errata *before* proceeding with any phase of a QAD FSS implementation.

QAD highly recommends that you implement the latest QAD FSS release available. Check the QAD Web site to make sure you have the latest release notes, user guide, 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 Release 3.0.5 3

Release Notes for Release 3.0.4 4

Release Notes for Release 3.0.2 7

Release Notes for Version 3.0.1 10

Release Notes for Version 3.0 14

Release Notes for Version 2.3 18

Release Notes for Version 2.2 21

Release Notes for Version 2.1.2 23

Release Notes for Version 2.1.1 24

Release Notes for Version 2.1 27

Release Notes for Version 2.0.1 30

Release Notes for Current Release

QAD Field Service Scheduler Version: 3.0.6

Date: September 2012

QAD Enterprise Applications Version: 2012 SE (.NET UI 2.9.4.47), 2012.1 EE (.NET UI 2.9.5.123)

Fixes

- Added time stamp information for call comments entered through FSS client.
- In the previous version, when you changed the status of a closed call visit to open and modified the fix time and travel duration repeatedly, the information of start date, visit date, and fix date did not show correctly, and the ERP application did not respond to your operation. This issue has been fixed.
- In the previous version, if a call was canceled from FSS, the visits for this call were not closed or removed. This issue has been fixed.

Release Notes for Release 3.0.5

QAD Field Service Scheduler Version: 3.0.5

Date: March 2012

QAD Enterprise Applications Version: 2012 EE (.NET UI 2.9.5.87)

About This Release

This release of QAD FSS only supports QAD 2012 EE and has no new or changed features. If you are not using QAD 2012 EE, please implement an earlier version of QAD FSS.

You require a license code from QAD Support to unlock and use QAD FSS with QAD EE.

Release Notes for Release 3.0.4

QAD Field Service Scheduler Version: 3.0.4

Date: September 2011

QAD Enterprise Applications Versions: 2010.1 EE (.NET UI 2.9.3.65), 2011 EE (.NET UI 2.9.3.65), 2011 EE (.NET UI 2.9.3.79), 2011 SE (.NET UI 2.9.4), 2011.1 EE (.NET UI 2.9.3.79)

Fixes

- In previous versions, the system only displays the visits scheduled for the engineer for the selected day correctly when visit start and end date are the same. When you right-click a day other than the visit date and time on the visit bar that spans several days on the Gantt chart and select the Engineer Visits for a Day command, the system displays a message: No engineer schedule found. This issue has been fixed.

Installation Changes

You require a license code from QAD Support to unlock and use QAD FSS with QAD EE.

Setup is required for the QAD .NET UI client. See ".NET Client Setup."

Complete the setup instructions described in "QAD Enterprise Applications."

.NET Client Setup

1. Remove any existing `qad.plugin.fss` folder under:

   `<.NET UI HomeServer>/packages/plugins/.`

2. This release contains a QAD FSS client package:

   - `Client\2.9.3\qad.plugin.fss-3.0.4-2.9.3-ee.zip` for .NET UI 2.9.3.65
   - `Client\2.9.3.79\qad.plugin.fss-3.0.4-2.9.3.79-ee.zip` for .NET UI 2.9.3.79
   - `Client\2.9.3.4\qad.plugin.fss-3.0.4-2.9.4-se.zip` for .NET UI 2.9.4

   Extract the required `.zip` file into `<.NET UI HomeServer>/packages/`.

3. Update `<.NET UI HomeServer>/packages/plugins/manifest.qpkg` and add the following line to the end of the package element:

   ```
   <package ref="${Repos}/plugins/qad.plugin.fss/manifest.qpkg"/>
   ```

The next time that clients connect to the QAD .NET UI HomeServer, they are prompted to load the new FSS plug-in.

Note To use the mapping capabilities of FSS, you must install Microsoft MapPoint 2006 or 2009 locally on each PC.

QAD Enterprise Applications

Note If you are also installing MFS 3.0.4, use the steps in *User Guide: QAD Mobile Field Service* to update the ERP server and then perform the steps in ".NET Client Setup," above.

1. Stop all servers, including Tomcat Webapps, WebSpeed brokers, and QAD Enterprise Applications database servers.

2. Copy all the files from the `/Server/SSM/QADERPVer` directory on the QAD FSS installation media into the *QADERPInstallDir*`\ssmpatch` directory.

3. Run MFG/UTIL and choose Database|Load Database Schema to load the following schemas into the QAD Enterprise Applications databases.

   - Load *QADERPInstallDir*`/ssmpatch/db/ssmpatch.df` and *QADERPInstallDir*`/ssmpatch/db/mfstriggers.df` into the production database.
   - Load *QADERPInstallDir*`/ssmpatch/db/ssmpatch.df` and *QADERPInstallDir*`/ssmpatch/db/mfstriggers.df` into the empty database.

4. Run *QADERPInstallDir*`/ssmpatch/xrc/utssmbrw.p` from a Progress editor that is connected to both the main production database and admin database.

   Note Perform this step only if you are using QAD 2011 SE.

5. In MFG/UTIL, choose Database|Load System Data into Database to load data into the QAD Enterprise Applications databases.

   a. Load data from *QADERPInstallDir*`/ssmpatch/data` into the production database. Accept default selected tables in the process.

   b. Load data from *QADERPInstallDir*`/ssmpatch/data` into the administration database. Accept default selected tables in the process.

   c. If you have implemented additional languages, load data from *QADERPInstallDir*`/ssmpatch/data/`*LanguageCode* into the production database. Accept default selected tables in the process.

6. Perform a full system compile. The Compile PROPATH should include the *QADERPInstallDir*`/ssmpatch/xrc` directory before the *QADERPInstallDir*`/xrc` directory.

7. Compile SSM bolt-on code.

   a. Choose Programs|Generate Compile List File.

   b. Use *QADERPInstallDir*`/ssmpatch/xrc` as the Source Directory.

   c. Choose Programs|Compile Procedures.

   d. Enter the compile list file from the previous step. Use the following PROPATH:

      QXOAdapterInstallDir`,`*QXOAdapterInstallDir*`/src,`
      QADERPInstallDir`/ssmpatch/xrc,`*QADERPInstallDir*`/`
      `xrc`

      Specify *QADERPInstallDir*`/ssmpatch` as the destination directory.

   Note If you do not use QAD Mobile Field Service, do not include *QXOAdapterInstallDir*`,`*QXOAdapterInstallDir*`/src` in the PROPATH.

   e. If you have implemented additional languages, repeat the compile process using the appropriate language and language-specific compile database set.

8. Compile QAD Enterprise Applications Desktop code. In MFG/UTIL, choose UI|Build UI Configuration and add *QADERPInstallDir*`/ssmpatch/xrc,`*QXOAdapterInstallDir* in front of the PROPATH.

9 Edit the PROPATH in all client scripts to add *QADERPInstallDir*/ssmpatch,*QXOAdapterInstallDir* in front of the PROPATH.

10 Add a database connection for qxevents (alias_qxevents as logical name) in the server startup/shutdown scripts and .pf files.

11 Modify the ubroker.properties file.

- If you use QAD .NET UI, add *QADERPInstallDir*/ssmpatch,*QXOAdatperInstallDir* in front of the PROPATH. Also, add srvrStartupProc=mfaistrt.p and srvrStartupProcParam=qra to the qadui AppServer.
- If you do not use QAD .NET UI, manually create an AppServer entry. Use the following example as a guide:

```
[UBroker.AS.qadui]
   srvrLogFile=QADERPInstallDir/qadui/qadui.server.log
   brokerLogFile=QADERPInstallDir/qadui/qadui.broker.log
   portNumber=39795
   initialSrvrInstance=2
   maxSrvrInstance=5
   operatingMode=Stateless
   autoTrimTimeout=600
   appserviceNameList=qadui
   controllingNameServer=NS1
   environment=qadui
   uuid=2993d17cfa993b70:-2eefabaf:11c88180435:-8000
   description=AppServer Transaction server for qadui
  srvrStartupParam=-pf QADERPInstallDir/qadui.pf (include the qxevents db with logical name
alias_qxevents and the qxo db with logical name qxodb)
   PROPATH=
QXOAdapterInstallDir:QADERPInstallDir/ssmpatch:QADERPInstallDir:QADERPInstallDir/ssmpatch/
qra.pl:.
   srvrStartupProc=mfaistrt.p
   srvrStartupProcParam=qra
```

12 Restart all QAD Enterprise Applications database servers, WebSpeed brokers, AppServers, and Tomcat Webapps.

13 Load procedure and field help.

a Log in to QAD Enterprise Applications.

b Go to Field Help Load (36.4.19).

c Specify US as the language and *QADERPInstallDir*/ssmpatch/data/fieldhlp.fhd as the field help load file.

d Press Go.

Release Notes for Release 3.0.2

QAD Field Service Scheduler Version: 3.0.2

Date: September 2010

QAD Enterprise Applications Versions: MFG/PRO eB2.1 Service Pack 4, QAD 2007, QAD 2007.1, QAD 2008 Standard, 2008.1 Standard, 2009 Standard, 2010 Standard, 2009 Enterprise, 2009.1 Enterprise, 2010 Enterprise, 2010.1 Enterprise

Installation Changes

You require a license code from QAD Support to unlock and use QAD FSS with QAD EE.

Setup is required for the QAD .NET UI client. See ".NET Client Setup."

Complete the setup instructions described in "QAD Enterprise Applications."

.NET Client Setup

1. Remove any existing `qad.plugin.fss` folder under:

   `<.NET UI HomeServer>/packages/plugins/`.

2. This release contains a QAD FSS client package:

   - `2.5.3\qad.plugin.fss-3.0.2-2.5.3.zip` for QAD eB2.1 SP4, QAD 2007 SE, QAD 2007.1 SE
   - `2.7.3\qad.plugin.fss-3.0.2-2.7.3.zip` for QAD 2008 SE and 2008.1 SE
   - `2.8\qad.plugin.fss-3.0.2-2.8.zip` for QAD 2009 EE
   - `2.8.1\qad.plugin.fss-3.0.2-2.8.1.zip` for QAD 2009 SE
   - `2.8.2\qad.plugin.fss-3.0.2-2.8.2.zip` for QAD 2009.1 EE
   - `2.9\qad.plugin.fss-3.0.2-2.9.zip` for QAD 2010 EE
   - `2.9.1\qad.plugin.fss-3.0.2-2.9.1.zip` for QAD 2010 SE
   - `2.9.2\qad.plugin.fss-3.0.2-2.9.2.zip` for QAD 2010.1 EE

   Extract the required `.zip` file into `<.NET UI HomeServer>/packages/`.

3. Update `<.NET UI HomeServer>/packages/plugins/manifest.qpkg` and add the following line to the end of the package element:

   ```
   <package ref="${Repos}/plugins/qad.plugin.fss/manifest.qpkg"/>
   ```

The next time that clients connect to the QAD .NET UI HomeServer, they are prompted to load the new FSS plug-in.

Note For QAD eB2.1 SP4, QAD 2007 SE, and QAD 2007.1 SE, FSS must be installed locally onto each client that will need to run the application from the QAD .NET user interface. To do this, extract `2.5.3\qad.plugin.fss-3.0.1-2.5.3.zip` into the `plugins` folder of your QAD .NET UI client installation. Your QAD .NET UI client installation is typically found in `C:\Program Files\QAD`.

Note To use the mapping capabilities of FSS, you must install Microsoft MapPoint 2006 or 2009 locally on each PC.

QAD Enterprise Applications

Note If you are also installing MFS 3.0.2, use the steps in *Technical Reference: QAD Mobile Field Service* to update the ERP server and then perform the steps in ".NET Client Setup," above.

1. Stop all servers, including Tomcat Webapps, WebSpeed brokers, and QAD Enterprise Applications database servers.

2. Copy all the files from the `/Server/SSM/QADERPVer` directory on the QAD FSS installation media into the `QADERPInstallDir\ssmpatch` directory.

3. If you are using eB2.1 SP4, QAD 2007 SE, or QAD 2007.1 SE, copy the files from the `/Server/QADUI` directory on the QAD FSS installation media into the directory:

   `QADUIInstallDir/com/qad/shell/interface`

4. Run MFG/UTIL and choose Database|Load Database Schema to load the following schemas into the QAD Enterprise Applications databases.

   - Load `QADERPInstallDir/ssmpatch/db/ssmpatch.df` and `QADERPInstallDir/ssmpatch/db/mfstriggers.df` into the production database.
   - Load `QADERPInstallDir/ssmpatch/db/ssmpatch.df` and `QADERPInstallDir/ssmpatch/db/mfstriggers.df` into the empty database.

5. Run `QADERPInstallDir/ssmpatch/xrc/utssmbrw.p` from a Progress editor that is connected to both the main production database and admin database.

   Note Perform this step only if you are using QAD 2009 SE, QAD 2010 SE, or QAD 2009 EE.

6. In MFG/UTIL, choose Database|Load System Data into Database to load data into the QAD Enterprise Applications databases.

   a. Load data from `QADERPInstallDir/ssmpatch/data` into the production database. Accept default selected tables in the process.

   b. Load data from `QADERPInstallDir/ssmpatch/data` into the administration database. Accept default selected tables in the process.

   c. If you have implemented additional languages, load data from `QADERPInstallDir/ssmpatch/data/LanguageCode` into the production database. Accept default selected tables in the process.

7. Perform a full system compile. The Compile PROPATH should include the `QADERPInstallDir/ssmpatch/xrc` directory before the `QADERPInstallDir/xrc` directory.

8. Compile SSM bolt-on code.

   a. Choose Programs|Generate Compile List File.

   b. Use `QADERPInstallDir/ssmpatch/xrc` as the Source Directory.

   c. Choose Programs|Compile Procedures.

   d. Enter the compile list file from the previous step. Use the following PROPATH:

      `QXOAdapterInstallDir,QXOAdapterInstallDir/src, QADERPInstallDir/ssmpatch/xrc,QADERPInstallDir/ xrc`

      Specify `QADERPInstallDir/ssmpatch` as the destination directory.

Note If you do not use QAD Mobile Field Service, do not include *QXOAdapterInstallDir*,*QXOAdapterInstallDir*/src in the PROPATH.

e. If you have implemented additional languages, repeat the compile process using the appropriate language and language-specific compile database set.

9. Compile QAD Enterprise Applications Desktop code. In MFG/UTIL, choose UI|Build UI Configuration and add *QADERPInstallDir*/ssmpatch/xrc,*QXOAdapterInstallDir* in front of the PROPATH.

10. Edit the PROPATH in all client scripts to add *QADERPInstallDir*/ssmpatch,*QXOAdapterInstallDir* in front of the PROPATH.

11. Add a database connection for qxevents (alias_qxevents as logical name) in the server startup/shutdown scripts and .pf files.

12. Modify the ubroker.properties file.

- If you use QAD .NET UI, add *QADERPInstallDir*/ssmpatch,*QXOAdatperInstallDir* in front of the PROPATH. Also, add srvrStartupProc=mfaistrt.p and srvrStartupProcParam=qra to the qadui AppServer.
- If you do not use QAD .NET UI, manually create an AppServer entry. Use the following example as a guide:

```
[UBroker.AS.qadui]
   srvrLogFile=QADERPInstallDir/qadui/qadui.server.log
   brokerLogFile=QADERPInstallDir/qadui/qadui.broker.log
   portNumber=39795
   initialSrvrInstance=2
   maxSrvrInstance=5
   operatingMode=Stateless
   autoTrimTimeout=600
   appserviceNameList=qadui
   controllingNameServer=NS1
   environment=qadui
   uuid=2993d17cfa993b70:-2eefabaf:11c88180435:-8000
   description=AppServer Transaction server for qadui
  srvrStartupParam=-pf QADERPInstallDir/qadui.pf (include the qxevents db with logical name
alias_qxevents and the qxo db with logical name qxodb)
   PROPATH=
QXOAdapterInstallDir:QADERPInstallDir/ssmpatch:QADERPInstallDir:QADERPInstallDir/ssmpatch/
qra.pl:.
   srvrStartupProc=mfaistrt.p
   srvrStartupProcParam=qra
```

13. Restart all QAD Enterprise Applications database servers, WebSpeed brokers, AppServers, and Tomcat Webapps.

14. Run *QADERPInstallDir*/ssmpatch/xrc/utssmse.p from a Progress editor that is connected to the main production database and admin database to perform data conversion.

Note Do not perform this step if you are using QAD 2009 SE, QAD 2009 EE, or later.

15. Load procedure and field help.

a. Log in to QAD Enterprise Applications.

b. Go to Field Help Load (36.4.19).

c. Specify US as the language and *QADERPInstallDir*/ssmpatch/data/fieldhlp.fhd as the field help load file.

d. Press Go.

Release Notes for Version 3.0.1

QAD Field Service Scheduler Version: 3.0.1

Date: March 2010

QAD Enterprise Applications Versions: MFG/PRO eB2.1 Service Pack 4, QAD 2007, QAD 2007.1, QAD 2008 Standard, 2008.1 Standard, 2009 Standard, 2009 Enterprise, 2009.1 Enterprise, 2010 Enterprise

Installation Changes

You require a license code from QAD Support to unlock and use QAD FSS with QAD EE.

Setup is required for the QAD .NET UI client. See ".NET Client Setup."

Complete the setup instructions described in "QAD Enterprise Applications."

.NET Client Setup

1. Remove any existing `qad.plugin.fss` folder under: `<.NET UI HomeServer>/packages/plugins/`.
2. This release contains a QAD FSS client package:
   - `2.5.3\qad.plugin.fss-3.0.1-2.5.3.zip` for QAD eB2.1 SP4, QAD 2007 SE, QAD 2007.1 SE
   - `2.7.3\qad.plugin.fss-3.0.1-2.7.3.zip` for QAD 2008 SE and 2008.1 SE
   - `2.8\qad.plugin.fss-3.0.1-2.8.zip` for QAD 2009 EE
   - `2.8.1\qad.plugin.fss-3.0.1-2.8.1.zip` for QAD 2009 SE
   - `2.8.2\qad.plugin.fss-3.0.1-2.8.2.zip` for QAD 2009.1 EE
   - `2.9\qad.plugin.fss-3.0.1-2.9.zip` for QAD 2010 EE

   Extract the required `.zip` file into `<.NET UI HomeServer>/packages/`.
3. Update `<.NET UI HomeServer>/packages/plugins/manifest.qpkg` and add the following line to the end of the package element:

   ```
   <package ref="${Repos}/plugins/qad.plugin.fss/manifest.qpkg"/>
   ```

The next time that clients connect to the QAD .NET UI HomeServer, they are prompted to load the new FSS plug-in.

Note For QAD eB2.1 SP4, QAD 2007 SE, and QAD 2007.1 SE, FSS must be installed locally onto each client that will need to run the application from the QAD .NET user interface. To do this, extract `2.5.3\qad.plugin.fss-3.0.1-2.5.3.zip` into the `plugins` folder of your QAD .NET UI client installation. Your QAD .NET UI client installation is typically found in `C:\Program Files\QAD`.

Note To use the mapping capabilities of FSS, you must install Microsoft MapPoint 2006 or 2009 locally on each PC.

QAD Enterprise Applications

Note If also installing MFS 3.0.1, use the steps in *Technical Reference: QAD Mobile Field Service 3.0.1* to update the ERP server and then perform the steps in ".NET Client Setup," above.

1. Stop all servers, including Tomcat Webapps, WebSpeed brokers, and QAD Enterprise Applications database servers.

2. Copy all the files from the `/Server/SSM/QADERPVer` directory on the QAD FSS installation media into the *QADERPInstallDir*`\ssmpatch` directory.

3. If you are using eB2.1 SP4, QAD 2007 SE, or QAD 2007.1 SE, copy the files from the `/Server/QADUI` directory on the QAD FSS installation media into the directory:
   QADUIInstallDir`/com/qad/shell/interface`

4. Run MFG/UTIL and choose Database|Load Database Schema to load the following schemas into the QAD Enterprise Applications databases.
   - Load *QADERPInstallDir*`/ssmpatch/db/ssmpatch.df` and *QADERPInstallDir*`/ssmpatch/db/mfstriggers.df` into the production database.
   - Load *QADERPInstallDir*`/ssmpatch/db/ssmpatch.df` and *QADERPInstallDir*`/ssmpatch/db/mfstriggers.df` into the empty database.

5. Run *QADERPInstallDir*`/ssmpatch/xrc/utssmbrw.p` from a Progress editor that is connected to both the main production database and admin database.

   Note Perform this step only if you are using QAD 2009 SE or QAD 2009 EE.

6. In MFG/UTIL, choose Database|Load System Data into Database to load data into the QAD Enterprise Applications databases.

   a. Load data from *QADERPInstallDir*`/ssmpatch/data` into the production database. Accept default selected tables in the process.

   b. Load data from *QADERPInstallDir*`/ssmpatch/data` into the administration database. Accept default selected tables in the process.

   c. If you have implemented additional languages, load data from *QADERPInstallDir*`/ssmpatch/data/`*LanguageCode* into the production database. Accept default selected tables in the process.

7. Perform a full system compile. The Compile PROPATH should include the *QADERPInstallDir*`/ssmpatch/xrc` directory before the *QADERPInstallDir*`/xrc` directory.

8. Compile SSM bolt-on code.

   a. Choose Programs|Generate Compile List File.

   b. Use *QADERPInstallDir*`/ssmpatch/xrc` as the Source Directory.

   c. Choose Programs|Compile Procedures.

   d. Enter the compile list file from the previous step. Use the following PROPATH:

      QXOAdapterInstallDir`,`*QXOAdapterInstallDir*`/src,`
      QADERPInstallDir`/ssmpatch/xrc,`*QADERPInstallDir*`/`
      `xrc`

      Specify *QADERPInstallDir*`/ssmpatch` as the destination directory.

   Note If you do not use QAD Mobile Field Service, do not include *QXOAdapterInstallDir*`,`*QXOAdapterInstallDir*`/src` in the PROPATH.

e If you have implemented additional languages, repeat the compile process using the appropriate language and language-specific compile database set.

9 Compile QAD Enterprise Applications Desktop code. In MFG/UTIL, choose UI|Build UI Configuration and add *QADERPInstallDir*/ssmpatch/xrc,*QXOAdapterInstallDir* in front of the PROPATH.

10 Edit the PROPATH in all client scripts to add *QADERPInstallDir*/ssmpatch,*QXOAdapterInstallDir* in front of the PROPATH.

11 Add a database connection for qxevents (alias_qxevents as logical name) in the server startup/shutdown scripts and `.pf` files.

12 Modify the `ubroker.properties` file.

- If you use QAD .NET UI, add *QADERPInstallDir*/ssmpatch,*QXOAdatperInstallDir* in front of the PROPATH. Also, add `srvrStartupProc=mfaistrt.p` and `srvrStartupProcParam=qra` to the qadui AppServer.
- If you do not use QAD .NET UI, manually create an AppServer entry. Use the following example as a guide:

```
[UBroker.AS.qadui]
   srvrLogFile=QADERPInstallDir/qadui/qadui.server.log
   brokerLogFile=QADERPInstallDir/qadui/qadui.broker.log
   portNumber=39795
   initialSrvrInstance=2
   maxSrvrInstance=5
   operatingMode=Stateless
   autoTrimTimeout=600
   appserviceNameList=qadui
   controllingNameServer=NS1
   environment=qadui
   uuid=2993d17cfa993b70:-2eefabaf:11c88180435:-8000
   description=AppServer Transaction server for qadui
  srvrStartupParam=-pf QADERPInstallDir/qadui.pf (include the qxevents db with logical name
alias_qxevents and the qxo db with logical name qxodb)
   PROPATH=
QXOAdapterInstallDir:QADERPInstallDir/ssmpatch:QADERPInstallDir:QADERPInstallDir/ssmpatch/
qra.pl:.
   srvrStartupProc=mfaistrt.p
   srvrStartupProcParam=qra
```

13 Restart all QAD Enterprise Applications database servers, WebSpeed brokers, AppServers, and Tomcat Webapps.

14 Run *QADERPInstallDir*/ssmpatch/xrc/utssmse.p from a Progress editor that is connected to the main production database and admin database to perform data conversion.

Note Do not perform this step if you are using QAD 2009 SE, QAD 2009 EE, or later.

15 Load procedure and field help.

a Log in to QAD Enterprise Applications.

b Go to Field Help Load (36.4.19).

c Specify US as the language and *QADERPInstallDir*/ssmpatch/data/fieldhlp.fhd as the field help load file.

d Press Go.

Application Changes

1 When you schedule a visit and try to update a call or call line status in FSS, if the record is locked by another user in SSM, the system now waits for the call to be unlocked for one minute and retries twice before it displays an error.

Release Notes for Version 3.0

QAD Field Service Scheduler Version: 3.0

Date: September 2009

QAD Enterprise Applications Versions: MFG/PRO eB2.1 Service Pack 4, QAD 2007, QAD 2007.1, QAD 2008 Standard, 2008.1 Standard, 2009 Standard, 2009 Enterprise, and 2009.1 Enterprise

Installation Changes

Setup is required for the QAD .NET UI client. See ".NET Client Setup."

Complete the setup instructions described in "QAD Enterprise Applications."

.NET Client Setup

1. Remove any existing `qad.plugin.fss` folder under: `<.NET UI HomeServer>/packages/plugins/`.
2. This release contains a QAD FSS client package:
   - `2.5.3\qad.plugin.fss-3.0-2.5.3.zip` for QAD eB2.1 SP4, QAD 2007 SE, QAD 2007.1 SE
   - `2.7.3\qad.plugin.fss-3.0-2.7.3.zip` for QAD 2008 SE and 2008.1 SE
   - `2.8\qad.plugin.fss-3.0-2.8.zip` for QAD 2009 EE
   - `2.8.1\qad.plugin.fss-3.0-2.8.1.zip` for QAD 2009 SE
   - `2.8.2\qad.plugin.fss-3.0-2.8.2.zip` for QAD 2009.1 EE

   Extract the required `.zip` file into `<.NET UI HomeServer>/packages/`.
3. Update `<.NET UI HomeServer>/packages/plugins/manifest.qpkg` and add the following line to the end of the package element:

   ```
   <package ref="${Repos}/plugins/qad.plugin.fss/manifest.qpkg"/>
   ```

The next time that clients connect to the QAD .NET UI HomeServer, they are prompted to load the new FSS plug-in.

Note For QAD eB2.1 SP4, QAD 2007 SE, and QAD 2007.1 SE, FSS must be installed locally onto each client that will need to run the application from the QAD .NET user interface. To do this, extract `2.5.3\qad.plugin.fss-3.0-2.5.3.zip` into the `plugins` folder of your QAD .NET UI client installation. Your QAD .NET UI client installation is typically found in `C:\Program Files\QAD`.

Note To use the mapping capabilities of FSS, you must install Microsoft MapPoint 2006 or 2009 locally on each PC.

QAD Enterprise Applications

Note If also installing MFS 3.0, use the steps in *Technical Reference: QAD Mobile Field Service 3.0* to update the ERP server and then perform the steps in ".NET Client Setup," above.

1. Stop all servers, including Tomcat Webapps, WebSpeed brokers, and QAD Enterprise Applications database servers.

2. Copy all the files from the `/Server/SSM/`*`QADERPVer`* directory on the QAD FSS installation media into the *`QADERPInstallDir`*`\ssmpatch` directory.

3. If you are using eB2.1 SP4, QAD 2007 SE, or QAD 2007.1 SE, copy the files from the `/Server/QADUI` directory on the QAD FSS installation media into the directory:

   QADUIInstallDir`/com/qad/shell/interface`

4. Run MFG/UTIL and choose Database|Load Database Schema to load the following schemas into the QAD Enterprise Applications databases.

   - Load *`QADERPInstallDir`*`/ssmpatch/db/ssmpatch.df` and *`QADERPInstallDir`*`/ssmpatch/db/mfstriggers.df` into the production database.
   - Load *`QADERPInstallDir`*`/ssmpatch/db/ssmpatch.df` and *`QADERPInstallDir`*`/ssmpatch/db/mfstriggers.df` into the empty database.

5. Run *`QADERPInstallDir`*`/ssmpatch/xrc/utssmbrw.p` from a Progress editor that is connected to both the main production database and admin database.

   Note Perform this step only if you are using QAD 2009 SE or QAD 2009 EE.

6. In MFG/UTIL, choose Database|Load System Data into Database to load data into the QAD Enterprise Applications databases.

   a. Load data from *`QADERPInstallDir`*`/ssmpatch/data` into the production database. Accept default selected tables in the process.

   b. Load data from *`QADERPInstallDir`*`/ssmpatch/data` into the administration database. Accept default selected tables in the process.

   c. If you have implemented additional languages, load data from *`QADERPInstallDir`*`/ssmpatch/data/`*`LanguageCode`* into the production database. Accept default selected tables in the process.

7. Perform a full system compile. The Compile PROPATH should include the *`QADERPInstallDir`*`/ssmpatch/xrc` directory before the *`QADERPInstallDir`*`/xrc` directory.

8. Compile SSM bolt-on code.

   a. Choose Programs|Generate Compile List File.

   b. Use *`QADERPInstallDir`*`/ssmpatch/xrc` as the Source Directory.

   c. Choose Programs|Compile Procedures.

   d. Enter the compile list file from the previous step. Use the following propath:

      `QXOAdapterInstallDir``,`*`QXOAdapterInstallDir`*`/src,`
      `QADERPInstallDir``/ssmpatch/xrc,`*`QADERPInstallDir`*`/`
      `xrc`

      Specify *`QADERPInstallDir`*`/ssmpatch` as the destination directory.

   e. If you have implemented additional languages, repeat the compile process using the appropriate language and language-specific compile database set.

9 Compile QAD Enterprise Applications Desktop code. In MFG/UTIL, choose UI|Build UI Configuration and add *QADERPInstallDir*/ssmpatch/xrc,*QXOAdapterInstallDir* in front of the PROPATH.

10 Edit the PROPATH in all client scripts to add *QADERPInstallDir*/ssmpatch,*QXOAdapterInstallDir* in front of the PROPATH.

11 Add a database connection for qxevents (alias_qxevents as logical name) in the server startup/shutdown scripts and `.pf` files.

12 Modify the `ubroker.properties` file.

- If you use QAD .NET UI, add *QADERPInstallDir*/ssmpatch,*QXOAdatperInstallDir* in front of the PROPATH. Also, add `srvrStartupProc=mfaistrt.p` and `srvrStartupProcParam=qra` to the qadui AppServer.
- If you do not use QAD .NET UI, manually create an AppServer entry. Use the following example as a guide:

```
[UBroker.AS.qadui]
   srvrLogFile=QADERPInstallDir/qadui/qadui.server.log
   brokerLogFile=QADERPInstallDir/qadui/qadui.broker.log
   portNumber=39795
   initialSrvrInstance=2
   maxSrvrInstance=5
   operatingMode=Stateless
   autoTrimTimeout=600
   appserviceNameList=qadui
   controllingNameServer=NS1
   environment=qadui
   uuid=2993d17cfa993b70:-2eefabaf:11c88180435:-8000
   description=AppServer Transaction server for qadui
  srvrStartupParam=-pf QADERPInstallDir/qadui.pf (include the qxevents db with logical name
alias_qxevents and the qxo db with logical name qxodb)
   PROPATH=
QXOAdapterInstallDir:QADERPInstallDir/ssmpatch:QADERPInstallDir:QADERPInstallDir/ssmpatch/
qra.pl:.
   srvrStartupProc=mfaistrt.p
   srvrStartupProcParam=qra
```

13 Restart all QAD Enterprise Applications database servers, WebSpeed brokers, AppServers, and Tomcat Webapps.

14 Run *QADERPInstallDir*/ssmpatch/xrc/utssmse.p from a Progress editor that is connected to the main production database and admin database to perform data conversion.

Note Do not perform this step if you are using QAD 2009 SE, QAD 2009 EE, or QAD 2009.1 EE.

15 Load procedure and field help.

a Log in to QAD Enterprise Applications.

b Go to Field Help Load (36.4.19).

c Specify US as the language and *QADERPInstallDir*/ssmpatch/data/fieldhlp.fhd as the field help load file.

d Press Go.

Application Changes

1 Support has been enhanced for ERP and .NET UI releases:

- QAD FSS 3.0 now supports eB2.1 SP4, QAD 2007 SE, QAD 2007.1 SE, 2008 SE, 2008.1 SE, 2009 SE/EE, and 2009.1EE.

- QAD FSS 3.0 now supports .NET UI versions 2.5.3 (eB2.1 SP4, QAD 2007 SE, and QAD 2007.1 SE), 2.7.3 (2008 SE and 2008.1 SE), 2.8 (2009 EE), 2.8.1 (2009 SE), and 2.8.2 (2009.1 EE).

2 Support has been added for MapPoint versions 2006 and 2009.

3 The refresh performance of browses has been enhanced.

Release Notes for Version 2.3

QAD Field Service Scheduler Version: 2.3

Date: June 2009

QAD Enterprise Applications Versions: QAD Enterprise Applications 2008 - Standard Edition (SE) running on QAD .NET UI 2.7.3

Installation Changes

Setup is required for the .NET UI client. See ".NET Client Setup."

Complete the setup instructions described in "QAD Enterprise Applications 2008 – Standard Edition Setup."

.NET Client Setup

1. Remove any existing `qad.plugin.fss` folder under: `<.NET UI HomeServer>/packages/plugins/`.
2. This release contains the following FSS client package:
   - `qad.plugin.fss-2.3.zip` for QAD 2008 SE

   Extract the appropriate `.zip` file into `<.NET UI HomeServer>/packages/`.
3. Update `<.NET UI HomeServer>/packages/plugins/manifest.qpkg` and add the following line to the end of the package element:

   ```
   <package ref="${Repos}/plugins/qad.plugin.fss/manifest.qpkg"/>
   ```

The next time that clients connect to the .NET UI HomeServer, they will be prompted to load the new FSS plug-in.

Note To use the mapping capabilities of FSS, you must install Microsoft MapPoint 2006 or 2009 locally on each PC.

QAD Enterprise Applications 2008 – Standard Edition Setup

QAD FSS version 2.3 is a bolt-on install to the server side and to the .NET UI plug-in.

1. Stop all AppServers, WebSpeed Brokers, and database servers; for example:
   - `asbman -i qadui_AS -stop`
   - `wtbman -i qadui_WS -stop`
   - `stopProduction.bat` or `stop.Production`
2. Copy the contents of the `Server/SSM/2008SE` folder into a folder called `ssmpatch` under the `<QAD ERP InstallDir>` folder.
3. Run MFG/UTIL and choose Database|Load Data Definitions.
4. Load `<QAD ERP InstallDir>/ssmpatch/db/ssmpatch.df` and `<QAD ERP InstallDir>/ssmpatch/db/mfstriggers.df` into the production database.
5. Load `<QAD ERP InstallDir>/ssmpatch/db/ssmpatch.df` and `<QAD ERP InstallDir>/ssmpatch/db/mfstriggers.df` into the empty database.

6 Choose Database|Load System Data into Database.

7 Connect to your main production database and enter `<QAD ERP InstallDir>/ssmpatch/data` as the input directory.

8 Accept the selected tables and click OK to load the data.

9 Repeat the data load for the administration production database.

10 If you have additional languages, repeat the data load into your main production database using `<QAD ERP InstallDir>/ssmpatch/data/<lang>` as the input directory.

11 Perform a full system recompile to make use of the new schema changes.

12 Choose Programs|Generate Compile List File. Use `<QAD ERP InstallDir>/ssmpatch/xrc` as the source directory.

13 Choose Programs|Compile Procedures.

14 In the Compile List File field, enter the compile list file just generated.

15 Include `<QAD ERP InstallDir>/ssmpatch/xrc` at the beginning of the compile PROPATH and enter `<QAD ERP InstallDir>/ssmpatch` as the destination directory.

16 Click Compile to deploy the new programs. Answer Yes to any prompts, and then click Continue on the Summary screen.

17 If you have additional languages, repeat the compile process using the appropriate QAD Enterprise Applications language and language-specific compile database set.

18 Copy the compiled triggers from `<QAD ERP InstallDir>/ssmpatch/triggers` to `<QAD ERP InstallDir>/triggers`.

19 Edit the PROPATH in all client scripts so that `<QAD ERP InstallDir>/ssmpatch` is listed before `<QAD ERP InstallDir>`; for example:

- `CharacterclientProduction.bat`
- `Production.ini` (two instances)
- `connmgrProduction.bat`
- `telnetProduction.bat`
- `qadui.chr`

20 Edit `ubroker.properties` for the `qadui` AppServer as follows:

- The PROPATH should have `<QAD ERP InstallDir>/ssmpatch` listed before `<QAD ERP InstallDir>` and `<QAD ERP InstallDir>/ssmpatch/qra.pl` added to the end
- Add `srvrStartupProc=mfaistrt.p`
- Add `srvrStartupProcParam=qra`

21 Restart the database servers, AppServers, and WebSpeed brokers.

- `startProduction.bat` or `start.Production`
- `asbman -i qadui_AS -start`
- `wtbman -i qadui_WS -start`

22 Run the program `<QAD ERP InstallDir>/ssmpatch/xrc/utssmse.p` from a Progress editor that is connected to the main production database.

23 Launch QAD Enterprise Applications 2008 SE and select menu 36.4.19 – Field Help Load. Enter `US` as the language and `<QAD ERP InstallDir>/ssmpatch/data/fieldhld.fhd` as the Field Help Load File. Accept all other defaults and select Go to load the new help data.

24 Run Menu System Maintenance from the QAD .NET UI and click the Refresh button to install the new menu options for SSM.

Application Changes

- The Gantt Chart -Scheduling tab now provides a paginated view and features a new set of navigation controls that let you easily page through scheduling information or jump to the first or last page. A new Rows per Page option is also available under the General tab in User Preference that lets you specify the default number of rows to be displayed on each page.
- You can now specify whether to display bars representing downtime or non-working time for each engineer in the Gantt Chart using a new Fetch Engineer Downtime Data option under the General tab in User Preference.
- In the Data Dependent Colors area in User Preference, two new categories are available for you to assign colors to: CallLineSvcType and VisitStatus.

Release Notes for Version 2.2

QAD Field Service Scheduler Version: 2.2

Date: April 2009

QAD Enterprise Applications Versions: eB2.1 SP4

Installation Changes

Setup is required for the .NET UI client. See ".NET Client Setup."

Prerequisites

1. Install eB2.1 SP4 per standard MFG/UTIL procedure.
2. Install .NET UI 2.5.3 per standard procedure.

QAD Enterprise Applications

1. If also installing MFS 2.2, use the steps in *Technical Reference: MFS 2.2* to update the ERP server and then skip to ?$paratext>? below.
2. Stop all Tomcat Webapps, AppServers, WebSpeed brokers and database servers.
3. Copy the contents of `\Server\SSM\eb21sp4` from the media into a folder called `<QAD ERP InstallDir>\ssmpatch`.
4. Run MFG/UTIL and choose Database|Load Data Definitions.
5. Connect to your main production db and load `<QAD ERP InstallDir>\ssmpatch\db\ssmpatch.df` as the data definition file.
6. Repeat the schema load for the main empty db.
7. Choose Database|Load System Data into Database.
8. Connect to your main production db and load `<QAD ERP InstallDir>\ssmpatch\data` as the input directory, accepting the selected tables.
9. Repeat the data load for the administration production db.
10. If you have additional languages, repeat the data load into your main production db using `<QAD ERP InstallDir>\ssmpatch\data\<lang>` as the input directory.
11. Perform a full system recompile.
12. Choose Programs|Compile Procedures.
13. Enter `<QAD ERP InstallDir>\ssmpatch\ssmcompile.lst` for the Compile List File. The Compile Propath should include the `<QAD ERP InstallDir>\ssmpatch\xrc` directory prior to the `<QAD ERP InstallDir>\xrc` directory. The destination directory should be `<QAD ERP InstallDir>\ssmpatch`.
14. If you have additional languages, repeat the compile process using the appropriate QAD Enterprise Applications language and language-specific compile database set.

15 Copy the compile triggers from <*QAD ERP InstallDir*>\ssmpatch\triggers to <*QAD ERP InstallDir*>\triggers.

16 Choose UI|Build UI Configuration in MFG/UTIL and include <*QAD ERP InstallDir*>\ssmpatch\xrc in the Propath prior to <*QAD ERP InstallDir*>\xrc.

17 Edit the Propath in all client scripts so that <*QAD ERP InstallDir*>\ssmpatch is listed before <*QAD ERP InstallDir*>.

18 Edit ubroker.properties for the qadui AppServer so that <*QAD ERP InstallDir*>\ssmpatch is listed before <*QAD ERP InstallDir*> and <*QAD ERP InstallDir*>\ssmpatch\qra.pl is added to the end.

19 Add srvrStartupProc=mfaistrt.p and srvrStartupProcParam=qra to the qadui AppServer.

20 Restart all database servers, WebSpeed brokers, AppServers, and Tomcat Webapps.

21 Run the program <*QAD ERP InstallDir*>\ssmpatch\xrc\utssmse.p from a Progress editor that is connected to the main production db.

22 Launch QAD Enterprise Applications and select Field Help Load (36.4.19). Enter US as the language and <*QAD ERP InstallDir*>\ssmpatch\data\fieldhlp.fhd as the Field Help Load File.

23 If using .NET UI, run Menu System Maintenance for the .NET UI and click the Refresh button to install the new menu options for SSM.

.NET Client Setup

FSS must be installed locally onto each client that will need to run the application from the QAD .NET user interface. To do this, extract \Client\qad.plugin.fss-2.2.0.0.zip into the plugins folder of your QAD .NET UI client installation. Your QAD .NET UI client installation is typically found in C:\Program Files\QAD.

Note To use the mapping capabilities of FSS, you also must install Microsoft MapPoint 2009 locally on each client PC.

Application Changes

FSS 2.2 now integrates with an optional installation of Microsoft MapPoint 2009. Previously, mapping capabilities were only available via MapPoint 2006. With FSS 2.2, mapping capabilities require the installation of MapPoint 2009 on each FSS client.

Release Notes for Version 2.1.2

QAD Field Service Scheduler Version: 2.1.2

Date: April 2009

QAD Enterprise Applications Versions: QAD 2009 - Enterprise Edition (EE)

Installation Changes

You require a license code from QAD Support to unlock and use QAD FSS. No further setup is required.

Note To use the mapping capabilities of FSS, you also must install Microsoft MapPoint 2006 or Microsoft MapPoint 2009 locally on each client PC.

Application Changes

FSS 2.1.2 now integrates with an optional installation of Microsoft MapPoint 2006 or Microsoft MapPoint 2009. Previously, mapping capabilities were only available via MapPoint 2006. With FSS 2.1.2, mapping capabilities require the installation of the Microsoft MapPoint software on each FSS client.

Release Notes for Version 2.1.1

QAD Field Service Scheduler Version: 2.1.1

Date: November 2008

QAD Enterprise Applications Versions: QAD Enterprise Applications 2008.1 - Enterprise Edition (EE)/Standard Edition (SE)

Installation Changes

Setup is required for the .NET UI client. See ".NET Client Setup."

If you are using QAD 2008.1 EE, you require a license code from QAD Support to unlock and use QAD FSS—no further setup is required.

If you are using QAD 2008.1 SE, complete the setup instructions described in "QAD Enterprise Applications 2008.1 – Standard Edition Setup."

.NET Client Setup

1. Remove any existing `qad.plugin.fss` folder under:
   `<.NET UI HomeServer>/packages/plugins/.`
2. This release contains two FSS client packages:
   - `qad.plugin.fss-2.1.1.0-ee.zip` for QAD 2008.1 EE
   - `qad.plugin.fss-2.1.1.0-se.zip` for QAD 2008.1 SE

   Extract the appropriate .zip file into `<.NET UI HomeServer>/packages/.`
3. Update `<.NET UI HomeServer>/packages/plugins/manifest.qpkg` and add the following line to the end of the package element:

   ```
   <package ref="${Repos}/plugins/qad.plugin.fss/manifest.qpkg"/>
   ```

The next time that clients connect to the .NET UI HomeServer, they will be prompted to load the new FSS plug-in.

Note To use the mapping capabilities of FSS, you must install Microsoft MapPoint 2006 locally on each PC.

QAD Enterprise Applications 2008.1 – Standard Edition Setup

QAD FSS version 2.1.1 is a bolt-on install to the server side and to the .NET UI plug-in.

1. Stop all AppServers, WebSpeed Brokers, and database servers; for example:
   - `asbman -i qadui_AS -stop`
   - `wtbman -i qadui_WS -stop`
   - `stopProduction.bat` or `stop.Production`
2. Copy the contents of the `Server/2008.1se/ssm` folder into a folder called `ssmpatch` under the `<QAD ERP InstallDir>` folder.
3. Copy the contents of the `Server/2008.1se/fss` folder into a folder called `fsspatch` under the `<QAD ERP InstallDir>` folder.

4 Run MFG/UTIL and choose Database|Load Data Definitions.

5 Connect to your main production database and enter *<QAD ERP InstallDir>*/ssmpatch/db/ssm2008.1se.df as the data definition file.

6 Click OK to load the new schema.

7 Repeat the schema load for the main empty database.

8 Choose Database|Load System Data into Database.

9 Connect to your main production database and enter *<QAD ERP InstallDir>*/ssmpatch/data as the input directory.

10 Accept the selected tables and click OK to load the data.

11 Repeat the data load for the administration production database.

12 If you have additional languages, repeat the data load into your main production database using *<QAD ERP InstallDir>*/ssmpatch/data/<lang> as the input directory.

13 Perform a full system recompile to make use of the new schema changes.

14 Choose Programs|Compile Procedures.

15 In the Compile List File field, enter *<QAD ERP InstallDir>*/ssmpatch/ssmcompile.lst.

16 Include *<QAD ERP InstallDir>*/ssmpatch/xrc at the beginning of the compile PROPATH and enter *<QAD ERP InstallDir>*/ssmpatch as the destination directory.

17 Click Compile to deploy the new programs. Answer Yes to any prompts, and then click Continue on the Summary screen.

18 Repeat Steps 14 through 17 in order to compile the fsspatch, replacing ssmpatch with fsspatch, and ssmcompile.lst with fsscompile.lst.

19 If you have additional languages, repeat the compile process using the appropriate QAD Enterprise Applications language and language-specific compile database set.

20 Copy the compiled triggers from *<QAD ERP InstallDir>*/ssmpatch/triggers to *<QAD ERP InstallDir>*/triggers.

21 Edit the PROPATH in all client scripts so that *<QAD ERP InstallDir>*/ssmpatch is listed before *<QAD ERP InstallDir>*; for example:

- CharacterclientProduction.bat
- Production.ini (two instances)
- connmgrProduction.bat
- telnetProduction.bat
- qadui.chr

22 Edit ubroker.properties for the qadui AppServer as follows:

- The PROPATH should have <QAD ERP InstallDir>/ssmpatch listed before <QAD ERP InstallDir> and <QAD ERP InstallDir>/ssmpatch/qra.pl added to the end
- Add srvrStartupProc=mfaistrt.p
- Add srvrStartupProcParam=qra

23 Restart the database servers, AppServers, and WebSpeed brokers.

- `startProduction.bat` or `start.Production`
- `asbman -i qadui_AS -start`
- `wtbman -i qadui_WS -start`

24 Run the program `<QAD ERP InstallDir>/ssmpatch/xrc/utssmse.p` from a Progress editor that is connected to the main production database.

25 Launch QAD Enterprise Applications 2008.1 and select menu 36.4.19 – Field Help Load. Enter `US` as the language and `<QAD ERP InstallDir>/ssmpatch/data/fieldhld.fhd` as the Field Help Load File. Accept all other defaults and click Go to load the new help data.

26 Run Menu System Maintenance from the .NET UI and click the Refresh button to install the new menu options for SSM.

Application Changes

See Application Changes on page 27.

Release Notes for Version 2.1

QAD Field Service Scheduler Version: 2.1

Date: September 2008

QAD Enterprise Applications Versions: QAD Enterprise Applications 2008.1 - Enterprise Edition (EE)

Installation Changes

Setup is required for the .NET UI client. See ".NET Client Setup."

You require a license code from QAD Support to unlock and use QAD FSS—no further setup is required.

.NET Client Setup

1. Remove any existing `qad.plugin.fss` folder under:

   `<.NET UI HomeServer>/packages/plugins/.`

2. Extract `qad.plugin.fss-2.1.0.0.zip` into `<.NET UI HomeServer>/packages/.`

3. Update `<.NET UI HomeServer>/packages/plugins/manifest.qpkg` and add the following line to the end of the package element:

   ```
   <package ref="${Repos}/plugins/qad.plugin.fss/manifest.qpkg" />
   ```

The next time that clients connect to the .NET UI HomeServer, they are prompted to load the new FSS plug-in.

Note To use the mapping capabilities of FSS, you must install Microsoft MapPoint 2006 locally on each PC.

Application Changes

1. The Update Visit Details pop-up window has been enhanced to display a more complete and concise view of the visit information.
   - The following additional visit-related information for service calls can be updated:
     - Start date and start time, which automatically updates Visit date/time and Fix date/time.
     - Visit date and visit time, which automatically updates Start date/time and Fix date/time.
     - Fix date and fix time, which automatically updates Start date/time and Visit date/time.
     - Call status can now be changed from Open to Closed. Existing fix date and time information can be updated by the user—QAD FSS automatically updates visit duration when the visit is closed. (Visit status can no longer be updated from the right-click menu for the scheduling Gantt chart—the Update Visit Details pop-up window must be used.)
     - Visit duration. QAD FSS automatically updates the Fix date/time.
     - Travel time. QAD FSS automatically updates the values in the Visit Date and Visit Time and Fix Date and Fix Time fields.
   - All times in the Update Visit Details pop-up window use the dispatcher time zone.

2 Users can now set various display preferences for the scheduling Gantt chart by using the User Preference dialog box. This dialog is displayed by clicking the User Preferences button. The User Preference dialog box has three tabs.

- General. The General tab has two areas: Geography Map and Gantt Chart Schedule.
  - Geography Map. Users can indicate that Microsoft MapPoint is installed by selecting the Use Mapping Software check box. They can specify region (US or Europe) depending on where they are using QAD FSS, and specify distance unit settings (miles or kilometers) and the path to the `Images` directory. QAD FSS assumes that Microsoft MapPoint is installed. The Geography Map tab displays only when the mapping software is installed and the Use Mapping Software check box is selected.
  - Gantt Chart Schedule. Users can indicate the format to use for engineer resource names (Last/First or First/Last) and whether to use travel time or visit time as the drop time onto the scheduling Gantt chart. Starting and ending work times can also be specified.
- Colors. The Colors tab has two areas: Default Colors and Data Dependent Colors.
  - Default Colors. Users can specify the color to use for scheduled visits, absence times, scheduled non-working time, and visits with alerts. The same color can be assigned to all types of time if desired.
  - Data Dependent Colors. Users can specify the color to use for visits based on data from the calls or call lines (for example, call status, call queue, call line work code, and so on).
- Tool Tips. Users can specify the fields that display in the Tool Tip used for scheduled visits on the scheduling Gantt chart.

Fixes

1 QAD FSS now allows calls that have no Next Status Date/Time defined to be selected in the All Calls browse; previously QAD FSS displayed an error message.

2 QAD FSS now prevents calls that are closed from being assigned to an engineer.

3 QAD FSS now calculates the correct fix time regardless of whether or not a response date is provided. If a response date is provided, QAD FSS calculates the fix date by adding the work time to the response date/time. If no response date is provided, fix date is calculated by adding the work time to the open date/time.

4 If an offset is defined using Multiple Time Zones Maintenance (11.21.22.1), QAD FSS now correctly updates the call date to the next day when the time is converted to 00:00.

5 In the QAD 2008 Enterprise Edition of QAD FSS 2.0.1, only the engineer code displayed in the Gantt scheduling chart. QAD FSS now displays the engineer name.

6 QAD FSS now calculates and displays the correct fix time using the HH:MM format in the All Calls browse.

7 QAD FSS now allows reason codes for engineer absences to be created immediately before these codes may be assigned to an engineer.

8 In the Spare Parts Details area in the List of Engineers tab, QAD FSS now displays the correct Quantity on Hand value for spare parts.

9 QAD FSS now correctly updates the status of a call line in the Call Info tab in Call Details when Prioritize Call Header is set to No in Engineer Schedule Control (11.13.15.24).

10 QAD FSS now correctly updates the visit travel duration if the visit before the current call is deleted or reassigned.

11 The Update Visit Details window now shows the correct fix date for calls that have start times and travel times that result in the call maintenance visit ending on the next day.

12 The Tool Tips now display relevant call-related information correctly; in previous versions some information was incorrect or missing.

Release Notes for Version 2.0.1

QAD Field Service Scheduler Version: 2.0.1

Date: June 2008

QAD Enterprise Applications Versions: QAD Enterprise Applications 2008 - Standard Edition, QAD Enterprise Applications 2008 - Enterprise Edition

Installation Changes

Installation setup is required for the .NET UI client and your QAD ERP application (QAD 2008 EE or QAD 2008 SE). These instructions replace the installation instructions contained in the *User Guide: QAD Field Service Scheduler.*

Note QAD FSS version 2.0.1 is a maintenance release that replaces QAD FSS 2.0.

Perform the steps below to set up your .NET client and QAD ERP application.

.NET Client Setup

1. Remove any existing `qad.plugin.fss` folder under: `<.NET UI HomeServer>/packages/plugins/.`
2. Extract `Client/qad.plugin.fss-2.0.1.0.zip` into `<.NET UI HomeServer>/packages/.`
3. Update `<.NET UI HomeServer>/packages/plugins/manifest.qpkg` and add the following line to the end of the package element:

   ```
   <package ref="${Repos}/plugins/qad.plugin.fss/manifest.qpkg"/>
   ```

The next time that clients connect to the .NET UI HomeServer, they will be prompted to load the new FSS plug-in.

Note If you want to use the mapping capabilities of FSS, you must install Microsoft MapPoint 2006 locally on each PC.

QAD Enterprise Applications 2008 – Enterprise Edition Setup

Customers that are currently using QAD Enterprise Applications 2008 – Enterprise Edition must replace their client plug-in and replace certain modified files/data on the server side using the instructions below.

1. Copy the contents of the `Server/2008ee` folder into a folder called `ssmpatch` under the `<QAD ERP InstallDir>` folder.
2. Copy the programs from the `<QAD ERP InstallDir>/ssmpatch/xrc` folder into the `<QAD ERP InstallDir>/xrc` folder where your source code resides. You might want to save the previous versions of these programs to uninstall the FSS bolt-on later.
3. Run QDT and choose Database|Load System Data into Database.
4. Connect to your main production database and enter `<QAD ERP InstallDir>/ssmpatch/data` as the input directory.
5. Accept the selected tables and click OK to load the data.
6. Repeat the data load for the administration production database.

7 Choose Programs|Compile Procedures.

8 In the Compile List File field, enter <*QAD ERP InstallDir*>/ssmpatch/ssmcompile.lst.

9 Click Compile to deploy the new programs. Answer Yes to any prompts and click Continue on the Summary screen.

QAD Enterprise Applications 2008 – Standard Edition Setup

QAD FSS version 2.0.1 is a bolt-on install to the server side and to the .NET UI plug-in.

Note QAD FSS version 2.0.1 is the first available release of QAD FSS on QAD Enterprise Applications 2008 – Standard Edition.

1 Stop all AppServers, WebSpeed Brokers and database servers; for example:

- asbman –i qadui_AS –stop
- wtbman –i qadui_WS –stop
- stopProduction.bat or stop.Production

2 Copy the contents of the Server/2008se folder into a folder called ssmpatch under the <*QAD ERP InstallDir*> folder.

3 Run MFG/UTIL and choose Database|Load Data Definitions.

4 Connect to your main production database and enter <*QAD ERP InstallDir*>/ssmpatch/db/ssm2008se.df as the data definition file.

5 Click OK to load the new schema.

6 Repeat the schema load for the main empty database.

7 Choose Database|Load System Data into Database.

8 Connect to your main production database and enter <*QAD ERP InstallDir*>/ssmpatch/data as the input directory.

9 Accept the selected tables and click OK to load the data.

10 Repeat the data load for the administration production database.

11 If you have additional languages, repeat the data load into your main production database using <*QAD ERP InstallDir*>/ssmpatch/data/<lang> as the input directory.

12 Perform a full system recompile to make use of the new schema changes.

13 Choose Programs|Compile Procedures.

14 In the Compile List File field, enter <*QAD ERP InstallDir*>/ssmpatch/ssmcompile.lst.

15 Include <*QAD ERP InstallDir*>/ssmpatch/xrc at the beginning of the compile PROPATH and enter <*QAD ERP InstallDir*>/ssmpatch as the destination directory.

16 Click Compile to deploy the new programs. Answer Yes to any prompts, and then click Continue on the Summary screen.

17 If you have additional languages, repeat the compile process using the appropriate QAD ERP language and language-specific compile database set.

18 Copy the compiled triggers from <*QAD ERP InstallDir*>/ssmpatch/triggers to <*QAD ERP InstallDir*>/triggers.

19 Edit the PROPATH in all client scripts so that <*QAD ERP InstallDir*>/ssmpatch is listed before <*QAD ERP InstallDir*>; for example:

- CharacterclientProduction.bat
- Production.ini (two instances)
- connmgrProduction.bat
- telnetProduction.bat
- qadui.chr

20 Edit ubroker.properties for the qadui AppServer as follows:

- The PROPATH should have <QAD ERP InstallDir>/ssmpatch listed before <QAD ERP InstallDir> and <QAD ERP InstallDir>/ssmpatch/qra.pl added to the end
- Add srvrStartupProc=mfaistrt.p
- Add srvrStartupProcParam=qra

21 Restart the database servers, AppServers, and WebSpeed brokers.

- startProduction.bat or start.Production
- asbman -i qadui_AS -start
- wtbman -i qadui_WS -start

22 Run the program <*QAD ERP InstallDir*>/ssmpatch/xrc/utssmse.p from a Progress editor that is connected to the main production database.

23 Launch QAD Enterprise Applications 2008 and select menu 36.4.19 – Field Help Load. Enter US as the language and <*QAD ERP InstallDir*>/ssmpatch/data/fieldhld.fhd as the Field Help Load File. Accept all other defaults and click Go to load the new help data.

24 Run Menu System Maintenance from the .NET UI and click the Refresh button to install the new menu options for SSM.

Application Changes

1 Searches in certain browses have been modified. In the All Calls browse during startup—and when a user switches between Call View and Engineer View—the system searches the BrowseSearches folder under the plug-in install directory for a file that matches the pattern *.fs060.xml. If multiple files match the pattern, the system runs the browse using the search condition saved in the first file. If no file is found, the system runs the browse without any search conditions.

The following FSS browses perform in the same way when the browse is initially loaded:

- Gantt Chart – Scheduling browse. The search pattern is *.fs065.xml.
- Engineer browse in List of Engineers tab. The search pattern is *.fs064.xml.
- Inventory browse in Spare Parts tab. The search pattern is *.fs067.xml.

2 The selection functionality in the All Calls browse has been modified. Now only one row can be selected at a time.

3 The visit data and engineer downtime schedules are now available only from the Gantt start date – 7 to Gantt start date + 13 (a total of 21 days).

Fixes

1. Various fixes have been applied to correct the display of information and the user interface:
   - Text formatting in the Call Details tab has been corrected.
   - The labels on the End User Details tab and the Contract Details tab on the Call Details screen have been corrected. In addition, the search criteria drop-down has been corrected.
   - A scroll bar has been added to the Call Details – Installed Base tab.
   - Searches that involve matching parts now return the correct search results.
   - The travel time for reassigned service calls now displays correctly.
   - The orange SLA bar now remains visible when a call row is clicked in the Gantt Chart – Scheduling tab.
2. Various fixes have been made to correct scheduling irregularities:
   - The correct travel time is now calculated when an engineer—if already scheduled for a service visit that day—is assigned an earlier appointment.
   - Travel duration is now calculated correctly when—following a service engineer break—a later service call is scheduled for the same address as a previous service call.
   - A service call can now be reassigned to a different engineer using the same call schedule details.
3. The system now attempts to schedule a later appointment after a previous appointment for an engineer only if the later appointment begins and ends on the same day.
4. When the QAD FSS configuration file is loaded, the system now checks to determine if Microsoft MapPoint 2006 is installed. If Microsoft MapPoint 2006 is not installed, the QAD FSS mapping functions are disabled, and a message to this effect displays.
5. The system now uses the absence address to calculate the travel distance to a service call when a non-working schedule has been assigned to the scheduled engineer for that day. Previously the home address of the engineer was used.