

# QAD .NET User Interface Release Notes

March 2015

These release notes include information about QAD .NET UI for QAD Enterprise Applications 2015 – Enterprise Edition (QAD .NET UI 3.1).

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

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# Installation and Configuration Information

The following summarizes installation and configuration changes for this version of the QAD .NET UI.

For information on the QAD .NET UI release history, see the *Platform and Product Availability Guide*, available from the General Reference section of the QAD support site (<http://support.qad.com>).

The QAD Document Library (<http://www.qad.com/documentlibrary/>) offers a complete set of all QAD user guides, training guides, and other materials.

**Note** If upgrading from a previous version, be sure to review the release notes for the versions between your current version and this version.

## Cumulative Patch Information

**Important** Before installing the QAD .NET UI, be sure to go to the QAD Store (<http://store.qad.com>) to check for the latest cumulative patch for this version of the QAD .NET UI. You must install the patch after installing the QAD .NET UI.

## Release Summary

**QAD .NET UI Version:** 2015 EE (3.1)

**Product Versions:** QAD Enterprise Applications 2015 – Enterprise Edition

**Microsoft .NET Framework Version:** 4

Microsoft .NET Framework 4 must be installed on client machines. You can download and install it from the Microsoft Download Center (<http://www.microsoft.com/en-us/download/details.aspx?id=17851>).

**Tomcat Versions:** 7.x

**Operating System:** The QAD .NET UI client runs on Windows 7 and Windows 8 (Desktop Mode). The QAD .NET UI can run on 64-bit Windows, but only in 32-bit mode.

**Microsoft Internet Explorer Version:** 9 or higher.

The Connection Manager SSH implementation uses the jSch component by JCraft, Inc., distributed in accordance with the license agreement (<http://www.jcraft.com/jsch/LICENSE.txt>).

## Supported Languages

The user interface supports the following languages in this release:

Chinese (Simplified)	English (US)	Italian	Portuguese (Brazilian)
Chinese (Traditional)	French	Japanese	Spanish (Castilian)
Dutch	German	Polish	Spanish (Latin American)

The following languages have some support, but new terms added in this release may appear in English:

Bulgarian	Greek	Norwegian	Slovenia
Czech	Hungarian	Romanian	Swedish
Danish	Korean	Russian	Turkish
Finnish	Lithuanian	Slovak	Ukrainian

## Georgia SoftWorks Windows SSH or Telnet Server Installation

The QAD .NET UI uses an SSH or telnet server for two purposes:

- On the database server, it is used to run a pool of sessions that support maintenance programs, reports, and inquiries.
- It enables the client terminal interface for programs that only run in terminal mode (see “Programs in Terminal Mode Only” on page 9) as well as any custom programs that do not conform to QAD programming standards.

As of the QAD .NET UI 2013 release, the QAD .NET UI now supports secure shell (SSH) as well as telnet. You can use either SSH or telnet; the default is now to use SSH. Typically, the SSH or telnet server runs on a UNIX (or Linux) machine. If you plan to use a UNIX machine for the SSH server, QAD recommends using the SSH daemon, which comes standard on all UNIX distributions. If you plan to use a UNIX machine for the telnet server, you can use the default telnet service provided with the operating system.

If you want to run the SSH or telnet server on a Windows machine rather than a UNIX (or Linux) machine, use the Georgia SoftWorks (GSW) SSH Server or Telnet Server. This software is not included on the QAD .NET UI installation media: you must download the latest version of the software to obtain the most recent patches and functionality from Georgia SoftWorks:

<http://www.georgiasoftworks.com/>

For the Georgia SoftWorks SSH Server, see:

[http://www.georgiasoftworks.com/products/ssh2/ssh2\\_server.php](http://www.georgiasoftworks.com/products/ssh2/ssh2_server.php)

For the Georgia SoftWorks Telnet Server, see:

<http://www.georgiasoftworks.com/products/uts/overview.php>

Refer to the Georgia SoftWorks documentation for installation information as well as software and system sizing requirements.

The Georgia Softworks Power Features pack provides a session monitor, which is helpful for troubleshooting connection issues.

### Registering the Georgia SoftWorks Software

To register the software, you provide a product ID to Georgia SoftWorks so that a serial number can be generated for your product. The serial number identifies server hardware and software components. If these components change or are upgraded, contact Georgia SoftWorks about generating a new product ID and serial number.

**Important** If you need to reinstall or are planning to move your installation to a different platform, or if you are a sales agent or a distributor, include that information on the registration.

- 1 Select the Registration icon from the program group in the Start menu.
- 2 In the Georgia SoftWorks Product Registration window, enter your customer information. The information that displays in the Product Information section is system-generated.
- 3 Set Sessions Requested to 100. This is the number QAD automatically supplies with your registration.

4 Choose Save to File to save this information, or choose Print. Then, follow the appropriate step to supply the product ID to Georgia SoftWorks:

a E-mail the saved registration form file to Georgia SoftWorks at:

registration@georgiasoftworks.com

When your form is received, a serial number is generated for your product and is returned to you by e-mail.

b FAX the printed registration form to Georgia SoftWorks at 706-265-1020. When your form is received, a serial number is generated for your product and is returned to you by FAX.

When you receive your serial number, return to the Georgia SoftWorks Product Registration window and enter it in the appropriate field in the registration form. Click Register.

## Tomcat Configuration

As part of the software prerequisites for installing QAD Enterprise Edition, you must install the Tomcat web server in the \$CATALINA\_HOME directory as described in the *QAD Enterprise Applications – Enterprise Edition Installation Guide*.

**Note** When you install Tomcat, be sure to update the tomcat-users.xml file in the /conf directory to include user, password, and role settings for the admin and pronav users. For example:

```
<?xml version='1.0' encoding='utf-8'?>
<tomcat-users>
  <user name="tomcat" password="tomcat" roles="tomcat" />
  <user name="role1" password="tomcat" roles="role1" />
  <user name="both" password="tomcat" roles="tomcat,role1" />
  <user name="admin" password="mfgpro" roles="qadadmin,manager,manager-gui,admin,pronav" />
  <user name="pronav" password="editor" roles="pronav" />
</tomcat-users>
```

## Process Maps Installation

The process maps are delivered separately from the QAD .NET UI. The process maps for QAD Enterprise Applications 2015 – Enterprise Edition are included with the QAD 2015 EE release media and are available on the QAD Store (<http://store.qad.com>). The QAD Deployment Toolkit (QDT) installs the process map components (including the viewer and editor) along with the process map content as part of the overall installation process for the product. However, you should then get the latest process map content for QAD 2015 EE from the QAD Store.

## Process Map Configuration Settings

QDT installs the process map viewer, editor, and related components on the home server as a stand-alone web application named pronav (tomcat/webapps/pronav). The following settings in the client session configuration file (client-session.xml) specify the default configuration:

```
<!-- Process map settings -->
<ProcessMapBaseUrl>${DesktopProtocol}://${DesktopHost}:${DesktopPort}/pronav</ProcessMapBaseUrl>
  <qad.url.process.editor>${ProcessMapBaseUrl}/ProcessEditor.jsp</qad.url.process.editor>
  <qad.url.process.viewer>${ProcessMapBaseUrl}/ProcessViewer.jsp</qad.url.process.viewer>
```

Previously, the process viewer and editor were in /tomcat/webapps/<environment> and the process map content was in /tomcat/webapps/<environment>/WEB-INF/pronav.

Now process maps are included in an environment named pronav (/tomcat/webapps/pronav) by default. A benefit of this approach is that you can now define a single process map installation that can be shared across multiple environments.

**Note** The configuration setting for the process map images (QAD\_IMG), set in Administration > Process Admin, now requires a fully qualified domain name. The settings now include a QAD\_PMAP\_ROOT setting to specify the URL to the process map installation (`http://server.domain.com:port/pronav/`) and then the QAD\_IMG setting is `{QAD_PMAP_ROOT}images/`.

## HTML5 Process Maps and Internet Explorer

The Process Viewer and Process Editor support HTML5.

Computers running the QAD .NET UI 2015 EE client should be upgraded to use the most recent version of Internet Explorer available for the version of Windows.

For instance, if running Windows 7, you should have Internet Explorer 9, which supports HTML5.

**Important** If running Windows XP, note that Windows XP is no longer supported by Microsoft (and QAD). You should upgrade to Windows 7 or higher. However, if you are using Windows XP SP3, you should at least upgrade to Internet Explorer 8. (Internet Explorer 9 is not supported on Windows XP.) This version of the QAD .NET UI requires at least version 9. With version 8, the Process Editor will not work properly when opened inside the QAD .NET UI because version 8 does not support HTML5. If you want to edit process maps and are running Internet Explorer 8, a workaround is to install a different browser that supports HTML5 such as Chrome or Firefox, and then access the Process Editor as a stand-alone web application based on where it is installed.

You can identify the URL for the Process Editor by choosing Help | View Configuration and searching for “process” to find the URLs for both the Process Editor and Process Viewer. The Process Editor URL will typically have the format `http://server.domain.com:port/pronav/ProcessEditor.jsp`. Enter this URL in the browser that supports HTML5.

## Easy On Boarding and Integrated Customization Toolkit Process Maps

Process maps now include additional maps for Easy On Boarding (EOB) and the Integrated Customization Toolkit (ICT).

Easy On Boarding, available as a QAD Services engagement, simplifies the implementation process by populating most standard data and configuring standard processes. Companies can adjust both data and processes later, but the process streamlines the implementation tasks. For more information about Easy On Boarding, contact QAD Services.

The Easy On Boarding process maps are organized into industry verticals including Automotive, Life Sciences, Industrial, Electrical, Consumer Products, and Food and Beverage. Nodes on the maps include links to Easy On Boarding training, documentation, and other attachments that are provided during a QAD Services engagement.

You can only access the Easy On Boarding attachments if you have a QAD Services engagement for QAD Easy On Boarding.

**Note** The location of the Easy On Boarding attachments is specified by the Attachments setting on the Administration | Process Admin – Process Properties screen. If you do not have a QAD Services engagement and you try to access the attachments from a process map node, you will get a “file not found” error message. However, if you set Attachments to `ProcessViewer.jsp?ProcessName=eob_attachments&f=`, a process map displays instead that lets you know you can only access the attachments if you have a QAD Services engagement.

## Internet Explorer and QAD .NET UI Client Installation

**Warning** The 64-bit version of Internet Explorer does not install the QAD .NET UI client, even if you are running Internet Explorer as an administrator. You must use the 32-bit version of Internet Explorer (typically located in `C:\Program Files (x86)\Internet Explorer\iexplore.exe`) to install the QAD .NET UI client. A situation in which this is likely to occur is when a user inadvertently creates a shortcut to the 64-bit version of Internet Explorer rather than the 32-bit version, and then uses that shortcut to launch Internet Explorer.

## Reporting Framework Sample Reports

When upgrading from a version of the QAD .NET UI earlier than 2.9.4 where the Reporting Framework included six sample reports, note that the six reports have been removed in the newer versions. If you keep the previous menu system data, and the AppServer has the upgraded version without the .p programs (proxies) for the sample reports, you get an error when you launch the reports from the menu. If you no longer need these reports, you can delete them from the menu system using Menu System Maintenance. If you would like to continue to use these sample reports, you can copy the six proxy programs from your previous system to the new system and compile them. Alternatively, delete them from the menu system, and then install the six sample reports included on the Reporting Framework Source CD, following the instructions included with the CD, which is available for download from the QAD Store (see “Reporting Framework Source and Samples on QAD Store” on page 9).

## Configuring Business Intelligence (BI) Portal for Dashboards

This release of the QAD .NET UI includes Dashboards, which bring together browses, web pages, business intelligence, and metrics within panels. If you have QAD Business Intelligence (BI) 3.9 or later, you can include BI panels on dashboards. To have the QAD .NET UI communicate with BI, you need to specify the URL for accessing the BI portal in the client session configuration (`client-session.xml`) file's `<BI.Dashboard.URL>` setting. The BI portal must be accessible to allow BI panels to be available on dashboards. (If the BI portal is not accessible, the BI panel option will not be available on Dashboards | Create Dashboard.) The setting in `<TomcatHome>/webapps/qadhome/configurations/<environment>/client-session.xml` is:

```
<BI.Dashboard.URL>http://ip_address_of_BI:port_number/qadbi</BI.Dashboard.URL>
```

In addition, to access the BI portal, the login/password for the QAD .NET UI client must match the login/password for the BI portal.

## Operational Metrics for Dashboards

Dashboards can include operational metrics if they are available on your system. QAD provides the Operational Metrics functionality with an active maintenance contract, and a term license key applied to the QAD Enterprise Applications product (see [https://support.qad.com/license\\_keys/activemaintenance](https://support.qad.com/license_keys/activemaintenance)). For more information, contact QAD Support.

## QAD .NET UI Security Configuration

In the *QAD .NET UI Administration Guide*, the Security Configuration chapter describes how to configure security for the QAD .NET UI. The topics covered include the following:

- Setting up SSH on the QAD .NET UI
- Setting up Public Key Authentication for SSH

- Setting up SSH for QAD .NET UI terminal mode
- Setting up SSL on the QAD .NET UI Tomcat home server
- Setting up HTTPS for QAD .NET UI Desktop screen display
- Setting up HTTPS for AIA

## Application Changes

### Browse Quick Search Removed (UIGS-668)

The Quick Search panel for browses has been retired as of this release.

### Browse Export .xlsx Support (UIG-9348)

You can now specify the Excel file type for exporting browse data (Actions | Export | Export to Excel). The settings for the Excel file type (2003 for .xls or 2007 for .xlsx) in the client session configuration file are as follows:

```
<!--Excel Export format - 2003 or 2007 (xls vs xlsx file format) -->
<!--Default is 2007 -->
<ExcelFormat>2007</ExcelFormat>
```

### Browse Report Output Option To Remove Form Feed Characters (UIG-9311)

Previously, when exporting browse data to a report for a text printer, new pages included the form feed character (^L) at the start of each page. You can now specify whether the form feed character is included by choosing Options | Desktop | Page Break setting. You can also specify the default setting in the client session configuration file (client-session.xml) with the following:

```
<PageBreak>true</PageBreak> includes the page break character, while
<PageBreak>false</PageBreak> does not include it.
```

### Process Viewer QADSH Link Behavior for Multiple Sessions (UIG-9235)

Process map nodes use QAD Shell URIs (qadsh://) to link to programs and other process maps. For instance, clicking on a node in a process map can direct a qadsh link to launch a program such as Sales Order Maintenance. Previously, if two QAD .NET UI clients were running on the same machine, a problem could arise where a qadsh link on a process map node would launch a program on the QAD .NET UI client that was started first. If you were using the QAD .NET UI client that was started second and clicked on a node to launch a program, the client that was started first would launch the program. This problem has now been fixed.

## Dashboard Changes

### VP of Sales Dashboard

A new Customer Management dashboard for VP of Sales is now included:

**VP of Sales** — Provides browses, business intelligence, and metrics to assist a VP of Sales with daily activities. With this dashboard, a VP of Sales can review salesperson quota achievement, top customers,

top items and sales orders to ship. Further, the dashboard displays business intelligence on bookings (by domain, financial year and month), days of sales outstanding for the last 12 months, gross margin amount (by domain, financial year and month), and sales order shipments on-time in-full (OTIF) (by domain, year and month). Finally, the dashboard includes metrics on sales quote gross margin, sales order line gross margin, and overdue sales order lines.

## Security and User Management Changes

### New Default for Credential Storage in Client-Side Active Directory Authentication (UIG-9349)

The client-side Active Directory Authentication feature now generates encryption keys that do not require users to re-enter their old Active Directory password upon a password change. This is the new default behavior. The cipher version determines the algorithm used when encrypting stored credentials. Valid cipher version values are 1 or 2. Version 1, the previous default, requires the re-encryption of stored credentials when a user's Windows password changes. Version 2, the new default behavior, does not require the re-encryption when a user's Windows password changes. The cipher version is specified in the client session configuration file (`client-session.xml`). The default setting is now as follows:

```
<QAD.Authentication.ActiveDirectory.CipherVersion>2</QAD.Authentication.ActiveDirectory.CipherVersion>
```

### User Synchronization (Cloud Deployments Only)

With user synchronization, QAD Enterprise Applications – Enterprise Edition user accounts can be synchronized with a corporate LDAP directory (Active Directory). The configuration for user synchronization includes the use of a DSML (Directory Services Markup Language) gateway for LDAP communication between QAD Enterprise Applications and a corporate LDAP directory. In March 2015, this feature is only available in Cloud deployments and requires QRA. For more information, contact QAD Services.

### LDAP Authentication (Cloud Deployments Only)

Users can log in to QAD Enterprise Applications with their existing corporate credentials. Configuration with the new LDAP Instance Maintenance and also User Maintenance settings. In March 2015, this feature is only available in Cloud deployments and requires QRA. For more information, contact QAD Services.

### Email Login (Cloud Deployments Only)

Users can log in with either their user ID or email address, using the same password they use for their other corporate applications. In March 2015, this feature is only available in Cloud deployments and requires QRA. For more information, contact QAD Services.

### QRA Session Management (Cloud Deployments Only)

The QAD Reference Architecture (QRA) is a new module deployment framework within QAD Enterprise Applications – Enterprise Edition. QRA is required for user synchronization and additional features. QRA session management provides the ability to enable or disable QRA in QAD Enterprise Applications – Enterprise Edition. In March 2015, QRA (and QRA session management) are only available in Cloud deployments. For more information, contact QAD Services.

## Reporting Framework Changes

### Reporting Framework Support for Non-Western Characters in 2D Bar Codes (UIG-9362)

The display of non-ASCII characters requires UTF-8 conversion for some of the codes. A new script object (QAD.Translate.UTF8Encode) has been added to perform this conversion.

### Reporting Framework Source and Samples on QAD Store

The Reporting Framework Source and Samples download (Reporting Framework Source CD) is available from the QAD Store (<http://store.qad.com>). The download contains sample reports, templates, and portions of the Reporting Framework's Progress code that are relevant for Progress data source developer usage. This does not include the source code of the data source programs used by the hundreds of new reports that have been developed recently using the framework; it only includes the generic pieces that are part of the framework itself. The download also includes documentation, coding tools, and examples for using the Scheduled Report and Run Report APIs, which allow developers to write applications to schedule or run reports.

## Programs in Terminal Mode Only

Some programs are only available in Terminal mode, which emulates the Character UI within the QAD .NET UI. You navigate the program in the same way as in the Character UI. The following programs are only available in Terminal mode:

- Accounts Not To Convert Maint
- AP Integrity Report
- Archive File Reload
- Call Queue Manager
- Change Deferred/Accrued Accounts
- CIM Data Load Process Monitor
- Combined Integrity Checks
- Compile Programs
- Convert Ship Qty in Ship UM
- Count Program
- Create Records for Printer Output
- Database Connect
- Database Disconnect
- Database Table Size Inquiry
- Debug CIM Document
- Dump Export/Import Doc for Edit
- End User Time Zone Change Util
- Escalation Monitor
- Exit to Operating System
- Export/Import Document Query

- Field Eligibility Maintenance
- Fixed Asset Maintenance
- Fixed Assets Integrity Report
- GL Integrity Report
- GLRW Mismatch A/C Code
- Initial Euro Exchange Rate Copy
- Inventory Integrity Report
- License Registration
- Multiple Time Zones Startup Util
- PO Integrity Report
- Process Import Documents
- Program Level
- Program/Text File Display
- Receive Import Documents
- Reload Edited Export/Import Doc
- Required Ship Schedule Update
- Send Export Documents
- Sequence Maintenance
- Server Time Zone Change Util
- Set Multiple BOL Print Utility
- Ship-From to AR
- Trading Partner Library Load
- Trading Partner Library Unload
- WIP Integrity Report