

# QAD .NET User Interface Release Notes

March 2011

These release notes include information about the QAD .NET UI 2.9.3 fixes and changes, as well as historical release notes for earlier versions. These changes may affect the way you install and use the QAD .NET UI. Read these notes before installing and using the QAD .NET UI.

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

QAD highly recommends that you implement the latest QAD .NET UI release available. Check the QAD support site to make sure you have the latest documentation and installation media:

<http://support.qad.com>

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## Release History Summary

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>). For details on each release, see the release notes available from the Documentation section of the QAD support site.

The following table summarizes the previous QAD .NET UI releases.

**Table 1**  
QAD .NET UI Release Summary

Version	Date	QAD Product Version
1.1	October 2006	eB2.1 Service Pack 4 (SP4)
1.2	January 2007	eB2.1 SP4
2.0	August 2007	QAD Enterprise Applications 2008–Enterprise Edition Early Adopter (EA)
2.1	March 2007	eB2.1 SP4 QAD Enterprise Applications 2007 (new name for eB2.1 SP5)
2.5	September 2007	QAD Enterprise Applications 2007.1 (new name for eB2.1 SP6)
2.5.1	December 2007	eB2.1 SP4 QAD Enterprise Applications 2007 QAD Enterprise Applications 2007.1
2.5.2	May 2008	eB2.1 SP4 QAD Enterprise Applications 2007 QAD Enterprise Applications 2007.1
2.5.3	June 2008	eB2.1 SP4 QAD Enterprise Applications 2007 QAD Enterprise Applications 2007.1
2.7	March 2008	QAD Enterprise Applications 2008–Standard Edition QAD Enterprise Applications 2008–Enterprise Edition
2.7.1	April 2008	QAD Enterprise Applications 2008–Standard Edition QAD Enterprise Applications 2008–Enterprise Edition
2.7.2	September 2008	QAD Enterprise Applications 2008.1–Enterprise Edition
2.7.3	November 2008	QAD Enterprise Applications 2008–Standard Edition QAD Enterprise Applications 2008.1–Standard Edition
2.8	May 2009	QAD Enterprise Applications 2009–Enterprise Edition QAD eB2.1 SP4 QAD Enterprise Applications 2007 (eB2.1 SP5) QAD Enterprise Applications 2007.1 (eB2.1 SP6) QAD Enterprise Applications 2008–Standard Edition (eB2.1 SP7) QAD Enterprise Applications 2008.1–Standard Edition (eB2.1 SP8)
2.8.1	June 2009	QAD eB2.1 SP4 QAD Enterprise Applications 2007 (eB2.1 SP5) QAD Enterprise Applications 2007.1 (eB2.1 SP6) QAD Enterprise Applications 2008–Standard Edition (eB2.1 SP7) QAD Enterprise Applications 2008.1–Standard Edition (eB2.1 SP8) QAD Enterprise Applications 2009–Standard Edition (eB2.1 SP9)
2.8.2	September 2009	QAD Enterprise Applications 2009–Enterprise Edition QAD Enterprise Applications 2009.1–Enterprise Edition
2.9	March 2010	QAD Applications 2010 Enterprise Edition
2.9.1	June 2010	QAD Applications 2010 Standard Edition
2.9.2	September 2010	QAD Applications 2010.1 Enterprise Edition
2.9.3	March 2011	QAD Enterprise Applications 2011 Enterprise Edition

## 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

## QAD .NET UI 2.9.3 Release Notes

The following sections describe highlights of the 2.9.3 release in the following areas:

- Installation and Configuration Changes
- Application Changes

### Installation and Configuration Changes

**QAD .NET UI Version:** 2.9.3

**Product Versions:** QAD Applications 2011 Enterprise Edition (eB3 SP8).

**Microsoft .NET Framework Version:** 3.0

**Tomcat Versions:** 5.5.x and 6.0.x.

**Operating System:** The QAD .NET UI client runs on Windows XP, Windows Vista, and Windows 7. It can run on 64-bit Windows, but only in 32-bit mode.

Some of the changes and fixes are included with the QAD .NET UI 2.9.3 release, but some may also require a patch (indicated by ECO) to your version of the product.

### Tomcat Versions and the QAD .NET UI

If you are upgrading and have already installed Tomcat 5.5.x, you do not need to upgrade to Tomcat 6. Tomcat 5.5.x is fully supported for use with QAD .NET UI 2.9.3.

### Progress Versions and the QAD .NET UI

QAD .NET UI supports the same version of OpenEdge10 as the QAD Enterprise Applications release for which it is running. Some QAD .NET UI features, however, may require a Progress version greater than the QAD Enterprise Applications required version. The following section details Progress OpenEdge version requirements, and also those features that require a specific OpenEdge version.

**Note** These exceptions do not affect the basic UI functions.

- When using Progress OpenEdge version 10.1B, the minimum required release is OE10.1B03 (Service Pack 3).
- When using Progress OpenEdge version 10.1C, the minimum required release is OE10.1C01 (Service Pack 1).
- The Browse Maintenance Import/Export browse option requires the use of at least Progress 10.1C01.
- The Browse Cancel All option requires version OE10.2B01 (for the client DLL version only: any OpenEdge 10 server version will work for this feature) to be fully functional. The QAD .NET UI 2.9.3 release ships this OpenEdge client DLL version as standard.

### QAD .NET UI Upgrade and Document Attachment Schema Issue

When installing QAD .NET UI 2.9.3 on QAD Enterprise Applications releases that do not have the new Document Attachment schema (such as QAD 2010.1 EE), the following error can occur during the QDT-based installation when Desktop programs are being compiled (as recorded in the `qadui.log` file):

```
unknown or ambiguous table docapp_mstr (725)
```

```
** <desktop source code>/com/qad/shell/interface/AttachmentUpdate_a.p Could
```

not understand line 57. (198).

To avoid this error, you must delete the file `AttachmentUpdate_a.p` from the `<desktop source code>/com/qad/shell/interface` directory, where `<desktop source directory>` is typically `/<env_name>/ebdesktop2/<web_app_name>/`. (This directory contains the file `mkdt.`)

## QAD .NET UI and Schema Changes

Some QAD .NET UI features require schema changes to be used in some QAD Applications environments. QAD Services can help you implement schema changes as needed.

- The QAD Messaging feature introduced in QAD .NET UI 2.9 to replace the QAD InBox feature requires schema available beginning in the QAD Applications 2010 Enterprise Edition release.
- Beginning with QAD Applications 2010 Enterprise Edition and QAD Applications 2011 Standard Edition, the Guide Me feature can take advantage of schema changes that remove the 15-line limitation for procedure and field help records maintained by Field Help Maintenance.

## QAD .NET UI and Internet Explorer 8

Kanban Workbenches

HTML Kanban workbenches are not certified for use with IE 8.x. Use IE version 7 instead.

Process Maps and Internet Explorer 8

You may experience the following issues when maintaining and viewing process maps in Internet Explorer 8:

- SVG is not supported by IE8. Therefore, when the SVG viewer is not automatically installed on the machine, process maps do not display correctly. You must manually install the SVG Viewer in order to view process maps.
- Print Preview for process maps is not supported by IE 8, and process maps do not print correctly.
- Drop-down lists in Process Editor appear to be slightly misaligned with the field box.

## Browse Collections, Menu Collections, and Metrics Installation

Starting with QAD .NET UI 2.7.1, the QAD .NET UI began maintaining the default storage data for menu collections, browse collections, and attachments in the `TomcatInstallDir/webapps/qadhome/configurations/default/storage` directory.

During system installation, you had to copy the appropriate default files in

`.../configurations/default/storage/...`

to

`.../configurations/config-name/storage/...`

for each system environment configuration.

Further, in QAD .NET UI 2.8.1, the release media included a `/notes/Metrics` directory, which included metrics definitions. In subsequent releases, metrics definitions were included as part of the default configuration. Metrics for Standard Edition were included in

`TomcatInstallDir/webapps/qadhome/configurations/default/eb21_storage/metrics`

and metrics for Enterprise Edition were included in

`TomcatInstallDir/webapps/qadhome/configurations/default/eb3_storage/metrics`. As

with browse and menu collections, these metrics had to be copied to the storage directories for each configuration.

Now, with QAD .NET UI 2.9.3 for QAD Enterprise Applications – Enterprise Edition, you no longer have to copy the files from the default directory for Enterprise Edition (*TomcatInstallDir/webapps/qadhome/configurations/default/eB3\_storage*). Instead, the content installer in the QDT-based installation process will do that for you based on the system environments you specify while using QDT.

**Note** Currently, this only applies to Enterprise Edition, which uses QDT; for Standard Edition, you must still copy the files from the default directory for Standard Edition (*TomcatInstallDir/webapps/qadhome/configurations/default/eB21\_storage*).

## Application Changes

### Browse and Program Integration Enhancements

In this release, you can move seamlessly between a record in a browse and viewing and modifying the details for that record. As you do so, you can take advantage of screen display options that allow you to focus on the details of interest.

When in a browse, you can double-click on a record and have the details display in a pane that opens to the right of the browse. You can then quickly view and edit those details. For example, in Item Browse, you can double-click on an item number, and then the details about that item display (in Item Master Maintenance). Meanwhile, in the browse display, you can select some other item number, and the display on the right automatically updates to show you the details of the item you have just selected. If you want to have the screen display only the details for a particular item, you can click on the Screen View icon along the upper right of the display. You can then return to the hybrid view by clicking the Hybrid View icon or just have the browse display by clicking the Browse View icon. While in the browse, if you want to create a new item, click the Create icon, located next to the Screen View icon. You can also toggle between View and Modify, depending on whether you want to just view the details of an item or modify those details.

### Browse Collection Navigation Enhancements

In a browse collection, a main browse drives the fields selected in the other browses and programs. The QAD .NET UI displays the other browses and programs in the lower part of a horizontal split-screen, with the main browse located in the upper part. When you drill-down a couple of times, the screen can start to display a lot of useful information, but with so many tabs open it can be difficult to focus on the information you need. Now, for the main browse, new buttons are included so that you can hide or show the display of the browse or program. The new buttons are located on the left side of the toolbar for the browse or program. The buttons display as two up arrow symbols when a view is open and as two down arrow symbols when a view is closed.

Additionally, on the right side of the toolbar, two icons, Tile Screen and Full Screen, allow you to switch between the tile screen view (the default) and the full screen view. When you select the full screen view for a program or browse driven by the main browse, the screen expands to show just the selected program or browse. To return to view all the driven programs and browses, click on the Tile Screen icon. Next to the Tile Screen and Full Screen icons, the browse hybrid view icons (Browse View, Hybrid View, and Screen View) are included for controlling the main browse.

The following summarizes the new display icons:

- Tile Screen (the default “split-screen” view) for the collection
- Full Screen (display the current view in full screen mode)
- Browse View (display the browse, focusing on the row for the currently selected item)

- Hybrid View (display a combination of the row for the currently selected item and the program that can modify the item)
- Screen View (display the program that can modify the currently selected item in a full screen)

These icons provide you with a useful way to control the display and focus on the information you need.

### Attachment Panel Enhancements

To improve the display and accessibility of attachments, the attachments have moved from being placed along the top of the program to a panel in the upper right-hand side of the program. You can open and close the display by clicking on the + / - icon. Links to the attachments are listed in order by the fields with which they are associated. You can view the attachment by clicking on the link, or view options by right-clicking on the link. Options include Open, Open With, Copy To, Delete, and Properties.

The Attach pull-down menu now includes a Show check box that specifies whether the Attachments panel is displayed. The pull-down then includes selections for each field, where you can access any current attachments or attach new items by selecting Attach. Selecting Properties here informs you of the attachment key, which indicates where the attachment is located in the attachments storage directory.

The Properties window, which you can access by right-clicking on an attachment link and selecting Properties, has been enhanced to include the last modified date, creation date, size, and attachment key, which indicates where the attachment is located in the attachments storage directory.

### Configurable Attachment Storage

You can now configure the system to have a single repository of attachments across multiple installations.

The default path is the same as in previous releases, where attachments are stored in `TomcatInstallDir/webapps/qadhome/configurations/config-name/storage/attachments` and subdirectories organize the attachments based on domain, program, type, and field. (Each directory includes an underscore character ( `_` ) at the end by default to account for the possibility of using a blank.)

Instead of using the default path, you can now specify a path (a WebDAV location) using the new `<Attachment> . . . <WebDAVRoot>` setting in the client session configuration file (`client-session.xml`) file. By default, the new setting is commented out. The new setting's default path is `${HomeServer}/webdav/attachments`, so that all attachments are stored on the Home Server in `/webdav/attachments`. To use this path, simply remove the comment delimiters (`<!--` and `-->`) around the statement. To use another location, edit the setting to use a path to some other server; for example:

```
<Attachment>
    <WebDAVRoot>ServerURL/webdav/attachments</WebDAVRoot>
</Attachment>
```

Note that the WebDAV location should be UTF-8 enabled to support the WebDAV standard.

With the `<WebDAVRoot>` setting, you now have a way to have all the attachments located on a common server.

This release also includes another approach for storing attachments, where the attachment information is maintained on the system database while the attached documents are stored in a specified WebDAV directory. In this approach (see “Document Attachments in System Database” on page 8), the default path for storing attachments and the storage location specified in `<WebDABVRoot>` are ignored. Instead, the

path specified in Document Attachment Application Maintenance's Repository field will be used, as described in the next section.

## Document Attachments in System Database

The new Document Attachments feature gives you the option to store attachment information in the system database, which provides better control and extra tagging information on the attached files. The actual files remain in a WebDAV accessible directory defined by QAD Enterprise Applications.

This feature currently applies only to non-component based programs — programs based on procedural, Progress-based technology. (For more information on component-based and non-component based programs, see *Introduction to QAD Enterprise Applications*.)

This feature introduces the following new Document Attachments menu items:

- Document Attachment Application Maintenance — Configure the system so that document attachment information will be stored in the database
- Document Tag Maintenance — Define the tags available for document attachments
- Document Maintenance — Select the tags and other metadata for a document attachment
- Documents browse
- Document Tags browse — List all the tags, and right-click on a record to list all documents associated with a tag
- Document Tags by Language Code browse — List all tags and language codes
- Document Attachment Applications browse — List all the Application IDs defined in Document Attachment Application Maintenance

The new Document Attachments feature requires QAD Enterprise Applications 2011 – Enterprise Edition. Using this feature with a prior version of QAD Enterprise Applications requires assistance from QAD Services to update the database schema.

To set up Document Attachments for non-component based programs:

- 1 Open Document Attachment Application Maintenance.
- 2 Set Application ID to `mfg` (enter `mfg` for attachments to non-component based programs).
- 3 Set Repository to the WebDAV location where you are storing attachments. For example:  
`http://host.domain.com/.../webdav/.../configurations/default/storage/attachments.`

**Note** The default path for storing attachments (`TomcatInstallDir/webapps/qadhome/configurations/config-name/storage/attachments`) and the storage location in specified in the `config-session.xml` file's `<Attachment>...<WebDABVRoot>` setting will be ignored. Instead, the default path for storing attachments will be the path specified in the Repository field.

- 4 Set Repository Type to `webdav`.

Now, when you add an attachment to a non-component based program, the attachment's properties will include additional information after Key, including Title, Last Author, Audience, Revision, Label, and Tags.

You can define tags you want to have available using Document Tag Maintenance by entering a tag string in the Tag Name field. You can use label terms (for example, `${SALES_ORDERS}`) for tags that you want to be translated.

To assign tags you have defined to a particular document attachment, open Document Maintenance and select the document in the Field Name field. Under Tags, select from the tags defined in Document Tag Maintenance. You can include up to 10 tags. Note that you can also define Title, Description, File Type, Audience, Revision fields here.

To find out the document attachments associated with a particular tag, in Document Tags browse, right click on a row (tag record) and choose Documents by Tag Name. Documents by Tag Name launches in a tab under Document Tags, listing all the documents associated with the tag. The columns in Documents by Tag Name include Tag Name, Description, Tag Translation, File Name (the file name of the document attachment), Title (title of the document attachment), File Size, File Type, Last Author, and Timestamp.

Additionally, Document Attachment Applications lists the Applications IDs. Right-click on an Application ID and choose Documents by Application ID to list all the documents associated with a particular application ID (for example, mfg).

### Configurable Toolbar Colors

You can now configure QAD .NET UI client toolbar colors in the client session configuration file (`client-session.xml`) file. The toolbar colors can vary based on the workspace, which gives you a helpful way of reminding users that they have changed environments or workspaces. For example, you might use red to indicate a test environment and silver to indicate a production environment.

To set the primary toolbar color, use `<Workspace.DefaultToolBarColor>`, specifying the color as RGB values:

```
<Workspace.DefaultToolBarColor>233,233,233</Workspace.DefaultToolBarColor>
```

To set the secondary toolbar color, use `<Workspace.DefaultToolBarColor2>`, specifying the color as RGB values:

```
<Workspace.DefaultToolBarColor2>233,233,233</Workspace.DefaultToolBarColor2>
```

You can specify individual workspaces to have different toolbar colors based on the workspace ID, which typically has the format `domain-id.entity_id`. For example:

```
<Workspace.workspaceid1.ToolBarColor>Silver</Workspace.workspaceid1.ToolBarColor>  
<Workspace.workspaceid1.ToolBarColor2>LightGray</Workspace.workspaceid1.ToolBarColor2>  
<Workspace.workspaceid2.ToolBarColor>LightGray</Workspace.workspaceid2.ToolBarColor>  
<Workspace.workspaceid2.ToolBarColor2>Silver</Workspace.workspaceid2.ToolBarColor2>
```

### Program Message Color and Font Options

You can now specify the color and font of program messages by setting the new Message Color and Message Font options available in Tools|Options. Note that Message Color and Message Font apply to the messages automatically displayed by programs. ( Message Color and Message Font options do not apply to workflow messages: these settings apply only to program messages.)

### Workspace Time Zone Display

You can now configure the workspace title to include the server time zone in the client session configuration file (`client-session.xml`) file. In `<Workspace.Format>`, `${domain-timezone}` specifies the server time zone for domain and `${domain-tzoffset}` specifies the server time zone offset for the domain in `+HH:MM` format:

```
<Workspace.Format>  
...  
${domain-timezone}
```

```

${domain-tzoffset}
...
</Workspace.Format>

```

## Messaging (Inbox) Enhancements

The recipient fields (To, Cc, and Bcc) have been enhanced with a “type-ahead” (auto complete) capability, so the system suggests user names based on the first letters you enter. Additionally, you can click on the To, Cc, or Bcc field names to use a menu for selecting recipients. The Select Recipients window lists all the users, allows you to filter the list of users, and then lets you select the user names to go in the To, Cc, or Bcc fields.

In Tools|Options, the Auto Complete Recipients Textbox option specifies whether message addresses entered in the recipient textboxes should be automatically completed (default: True).

You can now open messages in a separate tab by selecting the View option. In the Inbox, right-click on the message title and select View or double-click on the message title. The View button is also included as the first button on the Inbox’s toolbar.

## Power Browse / Look-up Browse Selection in Browse Maintenance

Previously, all browse definitions created using Browse Maintenance (QAD .NET UI mode) were marked as both Power Browse and Look-up Browse. You can now specify the browse type using the new Power Browse and Look-up Browse check boxes on the Header Data tab in Browse Maintenance. You can specify a browse definition to be a Power Browse, a Look-up Browse, or both.

**Note** These check boxes duplicate the function of the CHUI fields, allowing a definition to only be used as a browse and/or lookup in CHUI. However, it is important to note that in the QAD .NET UI no such distinction exists. A definition can be used as either a Browse or a Look-up regardless of this Browse Type setting in the database.

## Configurable Screens: Disabled Field Positioning

You can now reposition disabled fields within the active frame. Previously, only enabled fields could be repositioned.

## Configurable Menu Images

The menu items listed in the left-hand Applications panel include small (16 x 16 pixels) icons to indicate the type of menu item. Process maps, maintenance programs, browses, reports, and collections all have default icons, but you can now include your own custom icons. Custom icons should be the same size as the default icons (16 x 16 pixels) and accessible from some URL path that you specify in the client session configuration file (`client-session.xml`) file.

By default, the following statements in the client session configuration file (`client-session.xml`) file specify the default images for process maps, maintenance programs, browses, reports, and collections:

```

<Menu>
  <Image name="process">ProcessMap.png</Image>
  <Image name="maint">Maint.png</Image>
  <Image name="browse">Browse.png</Image>
  <Image name="report">Report.png</Image>
  <Image name="collection">Group.png</Image>
</Menu>

```

These statements specify which images to use for the menu items. The name attribute maps to the Image field in Program Information Maintenance. (The name attribute must be in lower-case.) The default image files (Maint.png, Browse.png, Report.png, and Group.png) cannot be modified.

If you would like to use different images for the process, maint, browse, report, or collection menu items, you can specify a different file along with a URL to where you have located the file. For example, the following specifies NewMaint.png, located in `http://url_path/`, to be the image file for maint (maintenance program) menu items:

```
<Menu>
  ...
  <Image name="maint">http://url_path/NewMaint.png</Image>
  ...
</Menu>
```

If you have a custom menu item type, you can define an image for it as follows, where *custom* is what you have specified in Program Information Maintenance's Image field:

```
<Menu>
  <Image name="process">ProcessMap.png</Image>
  <Image name="maint">Maint.png</Image>
  <Image name="browse">Browse.png</Image>
  <Image name="report">Report.png</Image>
  <Image name="collection">Group.png</Image>
  <Image name="custom">http://url_path/custom.png</Image>
</Menu>
```

**Note** Custom images should be 16 x 16 pixels.

### Cancel During Save in Browse Maintenance

In Browse Maintenance, when you save a browse definition to the database, the system attempts to run the browse to validate the definition after the definition is saved to the database. The attempt to run the browse can identify both definition errors and performance problems. The Save dialog box now includes a progress indicator so you can get an indication of the browse's performance. If the performance is poor, you can now cancel the attempt to run and validate the browse by clicking the Cancel button in the Save dialog box. After clicking Cancel, you can undo the save of the browse definition to the database. Click Yes to remove the definition you have just saved and restore the browse definition to the previous definition. Click No to save the new browse definition in the database even though it was not validated.

### Filter By Current Domain in Browse Maintenance

Previously, the Join to Domain option in the Header Data tab specified whether the tables are joined to the global domain automatically when the join phrase is generated. The Join to Domain option would apply the `global_domain` global variable to all tables containing a domain field in the definition. This has now been modified to only apply the `global_domain` to the parent table for the definition. Any remaining tables will be automatically joined by their domain fields when appropriate (that is, if the join is not already present and both sides of the relationship have domain fields). To reflect this change, the Join to Domain option is now called Filter By Current Domain. Filter By Current Domain does the following:

- It applies the `global_domain` filter to the primary table (parent table) for the browse (for example, `pt_mstr.pt_domain = global_domain`).
- It automatically joins tables on their domain fields where appropriate (for example, `so_mstr.so_domain = sod_det.sod_domain` for a browse containing `so_mstr` and `sod_det` in the definition). These changes appear in the Join Phrase field in the `vue_mstr` table of the Browse Maintenance database schema.

When selected only records from the current domain will appear in the query result set.

### Current Entity Only in Browse Maintenance

If the Filter by Current Domain check box in the Header Data tab is selected, you can then select Current Entity Only to filter the Browse by the current entity. If the Company table from the Financials schema is present in the definition, the `Company.CompanyCode` is filtered by the `current_entity` global variable (for example, `Company.CompanyCode = current_entity`).

The Enterprise Financials schema is highly normalized and thorough knowledge of the schema is required to create definitions against it. In order to create legitimate Browsers (that is, limiting the results to the current Domain and Entity), the Company table must be included and joined (on `Company_ID`) appropriately.

When selected, only records for the current Domain and Entity will be included in the result set.

**Note** This check box is only applicable for QAD Enterprise Applications – Enterprise Edition and is not displayed in Standard Edition.

### Menu Collection Maintenance Enhancements

The Name field drop-down has been enhanced so that the list of collections is sorted alphabetically and a scrollbar displays for long lists of collections. Further, with the new “type-ahead” display, collections starting with the letters you enter in the Name field are listed automatically.

### Dynamic Inquiries Enhancement

You can now resize the column widths in dynamic inquiries by dragging the borders of the title cells.

### Browse Side Panel Program Link Behavior

You can now control whether a program link in a browse opens the program in a new menu tab or in a side panel if the side panel is closed. In Tools|Options, under Browse, set Side Panel Auto Open to True to have the program link open in a side panel. Set Side Panel Auto Open to False to have the program link open in a menu tab. You can also specify this behavior by setting `<SidePanelAutoOpen>` to true or false in the client session configuration file (`client-session.xml`).

### Tomcat Encoding Setting

**Note** The following applies to system administrators configuring the Home Server.

Tomcat encoding for HTTP GET parameters defaults to ISO8859-1, but recent Tomcat modifications permit changing the default. If you change this default, extended characters in HTTP GET statements can be corrupted. In particular, attachments (in WebDAV) and Desktop direct launch can be affected. If Tomcat has UTF-8 enabled on GET requests, the client session configuration file (`client-session.xml`) file needs to account for this change. If Tomcat has `<Connector>` with `URIEncoding="UTF-8"` in `server.xml`, you should set the following in the client session configuration file (`client-session.xml`) file:

Set `<DesktopUtf8Conversion>` to false if Tomcat has `<Connector>` with `URIEncoding="UTF-8"` in `server.xml`. Otherwise, set it to true (the default):

```
<DesktopUtf8Conversion>true</DesktopUtf8Conversion>
```

Set `<Web.WebdavUtf8Conversion>` to `false` Tomcat if has `<Connector>` with `URIEncoding="UTF-8"` in `server.xml`. Otherwise, set it to `true` (the default):

```
<Web.WebdavUtf8Conversion>true</Web.WebdavUtf8Conversion>
```

## AIA Compression Support

The QDT-based installation of QAD Enterprise Applications 2011 – Enterprise Edition now supports setting up AppServer Internet Adapter (AIA) compression. AIA compression reduces network traffic between QAD .NET UI clients and the server, improving system performance. Note that currently you can do AIA compression or SSL, but not both. During the QDT-based installation process, you can choose to enable a second AppServer for SSL, to enable an AIA connection, or to do neither (the default). If you choose AIA, QDT then makes the necessary configuration changes to the client session configuration file (`client-session.xml`) and `ubroker.properties` file.

For reference, the following examples list the different settings in `client-session.xml` depending on whether you are using the AppServer or the AppServer Internet Adapter (AIA):

`<ConnectionPort>`

```
AppServer: <ConnectionPort>5162</ConnectionPort>
```

```
AIA : <ConnectionPort>8080</ConnectionPort>
```

`<ConnectionService>`

```
AppServer: <ConnectionService>qadui_ASpilot</ConnectionService>
```

```
AIA : <ConnectionService>aia/Aia?AppService=qadui_ASpilot</ConnectionService>
```

`<ConnectionSecureProtocol>`

```
AppServer: <ConnectionSecureProtocol>AppServer</ConnectionSecureProtocol>
```

```
AIA : <ConnectionSecureProtocol>http</ConnectionSecureProtocol>
```

`<ConnectionSecureService>`

```
AppServer: <ConnectionSecureService>qadui_ASpilot</ConnectionSecureService>
```

```
AIA : <ConnectionSecureService>aia/Aia?AppService=
qadui_ASpilot</ConnectionSecureService>
```

`<ConnectionSecurePort>`

```
AppServer: <ConnectionSecurePort>5162</ConnectionSecurePort>
```

```
AIA : <ConnectionSecurePort>8080</ConnectionSecurePort>
```

**Important** You should verify the settings in `$TOMCAT/conf/server.xml`. These settings are already set for the version of Tomcat included with QDT for QAD 2011 EE, but if you are using an earlier version, you will need to add these settings manually.

For AIA compression, the settings in `server.xml` should include

```
<Connector port=[tomcat port]
```

```
...
```

```
compression="on"  
compressableMimeType="text/html , text/xml , application/xml , application/octet-  
stream">
```

**Note** For more information on setting up AIA compression with QDT, see the *QAD Enterprise Applications – Enterprise Edition 2011 Installation Guide*.

### Program and Field Help Display Enhancement

When you are viewing a program such as Sales Order Maintenance, and you enter F1, a Help window displays help information for the program and field in which your cursor is located. The layout of the Help window has improved in this release to use a tab-based display of the current field and program. You can toggle the display by clicking the tabs. Additionally, a list of the fields for the current program is included so that you can quickly find out more information about the other fields in the program.

### Generalized Code Field Validation

If the user has edit access to generalized codes (see “Generalized Code Fields” on page 61), then the edit option displays along with any codes. If no codes are present, the edit option continues to display. If some other look up is assigned to this field, but no generalized codes exist, the Alt+L shortcut will display the look-up.

### Generalized Code Display Issue Resolved

Systems that were using many generalized codes were experiencing delays with the display of the drop-down selections. This issue has been resolved.

### Chart Designer in Windows 7 Issue Resolved

In QAD .NET UI 2.9.1 with Windows 7, when you used Chart Designer to create a chart from a browse, and clicked on the displayed chart, the system displayed an error message. This limitation has been fixed.

### Input Method Editor (IME) Mode Limitation

The Dart terminal emulation control used in the QAD .NET UI’s terminal mode display does currently not support IME mode. Consequently, the QAD .NET UI’s terminal mode does not accept character sets for Asian languages such as Chinese.

### Terminal Mode Transparent Background Limitation

Currently, programs displaying in Terminal Mode cannot have Background Color set to Transparent in Tools|Options. Setting the Background Color to Transparent will cause a `System.ArgumentException: Control does not support transparent background colors` error when launching a program in Terminal Mode.

### Code Page 1250 (Eastern European) and Japanese Data Excel Export Limitation

When exporting code page 1250 (Eastern European) or Japanese browse data to Excel spreadsheets, the data can be corrupted if the data set is larger than 1,000 records. As a workaround, the browsers can be run in smaller sets (less than 1,000 records) and then combined in Excel.

# QAD .NET UI 2.9.2 Release Notes

The following sections describe highlights of the 2.9.2 release in the following areas:

- Installation and Configuration Changes
- Application Changes

## Installation and Configuration Changes

**QAD .NET UI Version:** 2.9.2

**Product Versions:** QAD Applications 2010 Enterprise Edition (eB3 SP6); QAD Applications 2010.1 Enterprise Edition (eB3 SP7).

**Microsoft .NET Framework Version:** 3.0

**Operating System:** The QAD .NET UI client runs on Windows XP, Windows Vista, and Windows 7. It can run on 64-bit Windows (Microsoft Windows XP Professional x64 Edition), but only in 32-bit mode.

Some of the changes and fixes are included with the QAD .NET UI 2.9.2 release, but some may also require a patch (indicated by ECO) to your version of the product.

## QAD .NET UI and Progress Versions

QAD .NET UI supports the same version of OpenEdge10 as the QAD Enterprise Applications release for which it is running. Some QAD .NET UI features, however, may require a Progress version greater than the QAD Enterprise Applications required version. The following section details Progress OpenEdge version requirements, and also those features that require a specific OpenEdge version.

**Note** These exceptions do not affect the basic UI functions.

- When using Progress OpenEdge version 10.1B, the minimum required release is OE10.1B03 (Service Pack 3).
- When using Progress OpenEdge version 10.1C, the minimum required release is OE10.1C01 (Service Pack 1).
- The Browse Maintenance Import/Export browse option requires the use of at least Progress 10.1C01.
- The Browse Cancel All option requires version OE10.2B01 (for the client DLL version only: any OpenEdge 10 server version will work for this feature) to be fully functional. The QAD .NET UI 2.9.2 release ships this OpenEdge client DLL version as standard.

## QAD .NET UI and Schema Changes

Some QAD .NET UI features require schema changes to be used in some QAD Applications environments. QAD Services can help you implement schema changes as needed.

- The QAD Messaging feature introduced in QAD .NET UI 2.9 to replace the QAD InBox feature requires schema available beginning in the QAD Applications 2010 Enterprise Edition release.
- Beginning with QAD Applications 2010 Enterprise Edition and QAD Applications 2011 Standard Edition, the Guide Me feature can take advantage of schema changes that remove the 15-line limitation for help records maintained by Field Help Maintenance and Procedure Help Maintenance.

## **QAD .NET UI and Internet Explorer 8**

### **Kanban Workbenches**

HTML Kanban workbenches are not certified for use with IE 8.x. Use IE version 7 instead.

### **Process Maps and Internet Explorer 8**

You may experience the following issues when maintaining and viewing process maps in Internet Explorer 8:

- SVG is not supported by IE8. Therefore, when the SVG viewer is not automatically installed on the machine, process maps do not display correctly. You must manually install the SVG Viewer in order to view process maps.
- Print Preview for process maps is not supported by IE 8, and process maps do not print correctly.
- Drop-down lists in Process Editor appear to be slightly misaligned with the field box.

### **Fixed Asset Maintenance Display Mode**

In QAD Enterprise Applications — Enterprise Edition 2011 with QAD .NET UI 2.9.3, Fixed Asset Maintenance (32.2) is only available in Terminal mode.

## **Application Changes**

### **Exporting Browsers to Excel**

If you are using the QAD .NET UI with a Japanese or Eastern European code page, you may experience errors or data corruption when you attempt to export browses of 1,000 or more records to Excel. To resolve this issue, redefine the main browse into smaller datasets, run the sub-browses and export them separately to Excel. You can then combine the data into one Excel spreadsheet.

### **Editing Generalized Codes**

If you have user permissions to Generalized Code Maintenance (36.2.13), the right-click option to edit the generalized code value of a field is available as a drop-down menu option. Select the field and use Ctrl+F to display the field properties. The Edit option is accessible in the Generalized Codes drop-down menu when codes have been enabled for the field.

### **Reports and Browse Collections**

Only reports on the menu can be added to a browse collection, even if they are listed on the look-up.

### **Chinese Language Support for Terminal Mode**

Terminal mode does not provide Chinese language support. This configuration displays alignment and spacing issues, as well as data-entry limitations.

## Browse Link Maintenance and HTTP Parameters

Browse Link Maintenance currently supports a maximum of five HTTP parameters. Depending on the version of Progress being used and the length of the variable names entered, it may not always be possible to use five parameters in a browse link.

In Progress OpenEdge versions prior to 10.1B, the physical length of the values of the parameter fields in a Progress index was limited to around 200 characters. These parameter names are assembled into the field `url_exec` in `url_mstr`. The field `url_exec` participates in the primary index of `url_mstr` and so creates this limitation. In later Progress versions, the character length limit is raised to around 2,000 characters (see Kbase 66721), and the parameters issue is resolved.

## Product Structure Maintenance Levels

Product Structure Maintenance should not be used for large product structures that require rendering to more than 10 levels, due to possible performance issues. To work with large product structures, use the Effective Date and Levels filters to define a more specific working product structure.

## Browse Maintenance Tables

When creating a browse, you cannot add the same table to the browse twice. For example, if you want to join an customer address table to a sales order more than once (for example, for sold-to, bill-to, and ship-to customers), in SQL you can use sub-queries or table aliases. However, the current implementation uses a Progress dynamic query that does not support table alias or sub-queries in the column specification.

You can, however, create a browse that supports the viewing of child record information as child browses of the parent browse. For example, you can create a collection that uses Sales Order Browse as a parent with two or three children address browses (for example, Sold-To, Ship-To, Bill-To).

## Shipment ASN Export and Character UI

In the character UI, the selection list in Shipment ASN Export does not display the messages correctly when you scroll the messages list. Instead, the message is displayed in edit mode in the selection list row.

# QAD .NET UI 2.9.1 Release Notes

The following sections describe highlights of the 2.9.1 release in the following areas:

- Installation and Configuration Changes
- Application Changes

## Installation and Configuration Changes

**QAD .NET UI Version:** 2.9.1

**Product Versions:** QAD Enterprise Applications 2007 (eB2.1 SP5); QAD Enterprise Applications 2007.1 (eB2.1 SP6); QAD Enterprise Applications 2008 – Standard Edition (eB2.1 SP7); QAD Enterprise Applications 2008.1–Standard Edition (eB2.1 SP8); QAD Enterprise Applications 2009 – Standard Edition (eB2.1 SP9); QAD Applications 2010 Standard Edition (eB2.1 sp10).

**Microsoft .NET Framework Version:** 3.0

**Operating System:** The QAD .NET UI client runs on Windows XP, Windows Vista, and Windows 7. It can run on 64-bit Windows (Microsoft Windows XP Professional x64 Edition), but only in 32-bit mode.

Some of the changes and fixes are included with the QAD .NET UI 2.9.1 release, but some may also require a patch (indicated by ECO) to your version of the product.

## Operating Systems Supported in this Release

The QAD .NET UI 2.9.1 Standard Edition release supports only those Windows operating systems that are generally supported by Microsoft. These are Windows XP, Windows Vista, and Windows 7.

## Installing QAD Assist

QAD Assist is a QAD .NET UI application that hosts user guide and related content for the QAD .NET UI and for QAD Enterprise Applications. QAD Assist features a search engine you can use to search across user guides, field help, program help, and process maps.

### File Delivery

The installation files include:

- Files for installing the QAD Assist application
- Files for installing the QAD Assist content

The QAD Assist application files are included in the QAD .NET UI release media and consist of two Web applications:

```
epub.war  
search.war
```

The QAD Assist content files are included in the QAD .NET UI release media and also in the QAD Enterprise Applications 2010–Standard Edition Language Files CD for each supported language.

The QAD .NET UI release media contains the help files for the QAD .NET UI, in one .zip file:

`netui-ug-en-2010se-291.zip` — contains user guides about the QAD .NET UI and related topics (available in English only).

The QAD Enterprise Applications 2010 – Standard Edition Language Files CD contains the content for QAD Enterprise Applications in two .zip files:

erp-ug-en-2010se-sp10.zip — contains user guides about QAD Enterprise Applications (available in English only).

erp-<lang>-2010se-sp10.zip — contains help content in the language indicated by <lang>.

For example, if you have a Japanese language installation, you would use the following content files:

netui-ug-en-2010se-291.zip — copied from the QAD .NET UI release media.

erp-ug-en-2010se-sp10.zip — copied from the QAD Enterprise Applications 2010–Standard Edition Language Files CD for Japanese.

erp-jp-2010se-sp10.zip — copied from the QAD Enterprise Applications 2010–Standard Edition Language Files CD for Japanese.

## Installation Steps

Use the following steps to install QAD Assist. Note that the following steps are based on using a Linux environment with JDK 1.6.

- 1 Shut down Tomcat.
- 2 Copy `epub.war` and `search.war` from the `/zips` directory on the QAD .NET UI release media into the `/webapps` directory.
- 3 Start Tomcat.

With the Web application files in place, you next copy and unzip the content files.

- 4 Copy `netui-ug-en-2010se-291.zip` from the QAD .NET UI release media's `zips/content` directory to the `/webapps/epub` directory.
- 5 Copy `erp-ug-en-2010se-sp10.zip` from the QAD Enterprise Applications 2010–Standard Edition Language Files CD's `/ePub` directory to the `/webapps/epub` directory.
- 6 Copy `erp-<lang>-2010se-sp10.zip` from the QAD Enterprise Applications 2010–Standard Edition Language Files CD `/ePub` directory to the `/webapps/epub` directory.
- 7 For each .zip you have copied, unzip the content using the `unzip` command.

For example, for `netui-en-2010se-291.zip`, enter:

```
unzip netui-en-2010se-291.zip
```

Unzipping creates a `/netui` directory containing the content under the `/epub` directory.

After you have unzipped the content, set up the search engine index:

- 8 Using a web browser, access the search administration page URL.  
Open `http://host:port/search`, where `host` and `port` are the host and port for the Tomcat instance under which you installed the `epub` and `search` Web applications.
- 9 Click the **New Index** button and in the field enter:

```
default
```

This creates a new index and directory in the following location:

```
search/WEB-INF/indexes/default
```

Next, you need to add index (links) content to the search engine by copying the `links_*.xml` files (which contain the default link information for the search engine index) under `/epub` to `/search/WEB-INF/indexes/default`.

You can use the following step to copy all the files that match `'links-*.xml'` into the directory.

**10** Using a command line, navigate to the `/epub` directory and enter:

```
cp `find . -name "links-*.xml"` ../search/WEB-INF/indexes/default
```

The search engine automatically imports these files and removes them upon completion.

The search administration page (<http://host:port/search>) updates the information about the default index, including the number of documents in the Documents column and the total size under the Size column.

Note that you can import the same content multiple times without affecting the number of documents loaded into the search engine, although that action will increase the allocated file size. In the Actions column, you can click Optimize to reclaim the excess disk space.

To load the default index, you must stop and start the search engine for that index:

**11** In the Actions column for default, click Stop.

**12** In the Actions column for default, click Start.

Finally, you need to update the `client-session.xml` file.

**13** Edit the `client-session.xml` file

(`<HomeServer>/configurations/<SysEnvName>/client-session.xml`) so that it includes the following settings:

```
<ContentIndexServer>http://host:port/search</ContentIndexServer>
```

```
<ContentIndex>default</ContentIndex>
```

```
<ePublisherServer>http://host:port/epub</ePublisherServer>
```

QAD Assist is now ready for use. You can access it from the QAD .NET UI by choosing Help|Applications Help or by pressing the F1 key.

### Upgrading QAD Assist from an Existing Installation

If you are upgrading the QAD .NET UI but continuing with your current version of QAD Enterprise Applications, you must replace the existing QAD Assist content with the new content provided in this release.

Replace the existing content in the `/webapps/epub/netui` folder with the new content contained in the `netui-ug-en-2010se-291.zip` (User Guide content) and `erp-<lang>-2010se-sp10.zip` (language Help content) files. To do this, you complete steps 4 to 7 in the procedure described above.

### QAD Messaging and Previous Standard Edition Releases

QAD Messaging is a new messaging and internal email feature within QAD applications (see “QAD Messaging” on page 21).

When you install QAD .NET UI 2.9.1, QAD Messaging is enabled by default for QAD Standard Edition 2010. QAD Messaging is not compatible with software versions previous to QAD Standard Edition 2010, however, and you must disable the feature for QAD Applications version 2009.1 and older.

The QAD Messaging plugin is enabled by an entry in the `client-bootstrap.xml` file:

```
<!-- A plugin deployed on the client that should not be initialized. Multiple plugins may be
```

```

disabled by repeating this configuration. [plugin key] (bootstrap only)-->
<!-- for eB2.1 SP10+ no change is needed below -->
<!-- for eB2.1 SP6 - SP9, change the disabled to qad.plugin.messaging2 -->
<!-- for versions earlier than eB2.1 SP6 that do not have the messaging schema, disable both
qad.plugin.messaging and qad.plugin.messaging2 -->
<disable>qad.plugin.messaging</disable>
<disable></disable>

```

As the text indicates, to disable QAD Messaging for releases QAD Enterprise Applications 2007.1 (eB2.1 SP6), 2008–Standard Edition (eB2.1 SP7), 2008.1–Standard Edition (eB2.1 SP8), or 2009–Standard Edition (eB2.1 SP9), you must ensure that the following line is included in this section of the file:

```
<disable>qad.plugin.messaging2</disable>
```

For releases prior to QAD Enterprise Applications 2007.1 (eB2.1 SP6), you must ensure that the following lines are included in this section of the file:

```
<disable>qad.plugin.messaging</disable>
<disable>qad.plugin.messaging2</disable>
```

## Process Map Context Parameters

When installing process maps following an upgrade, the installation does not overwrite the existing process parameters as defined on the Context Parameters tab of the Process Admin option. The Properties Directory and XML Directory parameters displayed on the tab are also stored in the `process-config.xml` file, which is located in the `WEB-INF/conf/` directory, and is not replaced when you install a new version of the .NET UI.

However, the `process-config.xml` *template* file, which is stored in the `WEB-INF/conf/defaults/` directory is updated during installation, and is used by the system if no file exists in the `WEB-INF/conf/` directory. This can prevent the system from locating and displaying your process maps when you have merged them following upgrade.

For this reason, it is good practice to copy your Properties Directory and XML Directory settings before upgrading, and if they have changed following the upgrade, to re-enter them in the Context Parameters tab.

## Application Changes

### QAD Messaging

QAD Messaging is introduced in this release to replace the existing Inbox functionality. QAD Messaging integrates with Workflow to create a messaging and internal e-mail system within QAD applications.

QAD Messaging is enabled by default and is displayed as a panel on the left of the main screen. The feature consists of a button toolbar and Folders area, which contains the following folders:

*Inbox.* Click to display the inbox of current messages. Similar to standard email, the Inbox folder name indicates the number of unread messages in brackets. The Inbox screen features an e-mail toolbar, with options to create, move, delete, and print messages, and to reply, reply to all, and to forward selected messages. The Refresh button refreshes the current Inbox view. You can use the Filter drop-down list to filter messages by From, Date, or Subject.

*Drafts.* Click to display the Drafts folder. When you click to save an unfinished message, the message is saved to the Drafts folder for future sending. You can edit, forward, move, and delete drafts, and you send a draft by selecting the message and clicking Send.

*Deleted.* Click to display the folder for deleted messages. Deleted messages are retained in this folder until you select the message and click Delete.

*Alerts.* Click to display the folder of system alerts. Alerts are messages generated by Workflow in response to QXtend events, and sent to specified alert subscribers.

*Workflow.* Click to display the folder of workflow messages. You create workflow messages in other applications, which are then displayed and processed in QAD Messaging. A workflow message consists of a hyperlink to the application object (for example, a sales order browse) and optional information and instructions.

*Folders.* Click Folders and then click the Folders icon on the toolbar to create separate messages folders in which to organize messages. To delete a folder and its messages, select the folder name and click the Delete button on the Messaging toolbar.

There are also additional Messaging options under Tools|Options:

*Display Alerts.* Set to True to display the New Message Prompt in the Messaging area. The prompt is displayed when the user receives a new message.

*Empty Deleted Folder Frequency.* Set the number of days after which the Deleted folder is emptied of messages.

*Poller Frequency.* Sets the interval in milliseconds after which the system automatically polls the mail server for QAD Messaging.

## Chart Designer in Windows 7

When you use Chart Designer to create a chart from a browse, and click on the displayed chart, the system displays the error message 'Unable to process your request'. This limitation occurs on Windows 7 operating systems only.

## Product Structure Maintenance

A previous Release Notes entry referred to the need to import the browse programs `ps001.p` and `ps002.p` in order to run Product Structure Maintenance. These programs are in fact browse definitions, and this procedure applies to .NET UI Mode only. Therefore, to run Product Structure Maintenance successfully in .NET UI mode, the system must contain the browse definitions `ps001` and `ps002`. These browses are included in the release media in the directory `/notes/ps_maint` and can be imported using the Browse Maintenance Import function.

**Note** You must be using Progress Open Edge version 10.1C or later to use the Browse Maintenance Import function.

## Default Operational Metrics

The following table lists the Operational Metrics that are provided out-of-box in this release:

Component/Application Area	Operational Metric
Accounts Receivables	Customer Credit Limits
Addresses	US Addresses Countries

<b>Component/Application Area</b>	<b>Operational Metric</b>
AP Operations	Supplier Invoice Analysis Supplier Invoice Analysis Current Q Supplier Payment Analysis Supplier Aging Analysis Value Supplier Aging Analysis NOS
AR Operations	Customer Payment Risk Customer Payment Risk Customer Invoice Analysis Current Q Customer Invoice Aging Analysis Value Customer Invoice Again Analysis NOS Customer Invoice Analysis Current Quarter Customer Invoice Aging Analysis Val Customer Invoice Aging NOS
Banking GL	Bank Statements Supplier Checks Entity GL Period
Customer Data	Customers Customer Data Setup
DRP	Open DRP Requests
Inventory Metrics	Zero Cost Inventory Inventory Turns Inventory Value By ABC Code
Inventory Turns	Inventory Turns
Item ABC Code Metrics	Inventory Value By ABC Code
Item Planning Data Integrity	Item Master Metrics Manufactured Items Purchase Items MPS Items
Manufacturing	Manufacturing Receipts - Yesterday Manufacturing Receipts - Last 7 Days Manufacturing Receipts - Last 30 Days
Manufacturing Diagnostics	Manufacturing Scheduled Receipts (overdue) Open Purchase Order Lines (overdue)
Planning Process Action Messages	Rescheduled More Than 5 Days Orders Due/Past Due For Release Orders Passed Due Cancel Orders
Planning Process Diagnostics	Manufactured Items Purchased Items DRP Items MPS Items
Production Data	Manufacturing Receipts - Last 30 Days Manufacturing Receipts - Last 60 Days Manufacturing Receipts - Last 90 Days

Component/Application Area	Operational Metric
Purchasing	Purchasing Schedule Receipts
Sales Orders	Sales Orders Past Due
Shipment Performance	Sales Performance - Yesterday Sales Performance - Last 7 Days Sales Performance - Last 30 Days Sales Performance - Last 60 Days Sales Performance - Last 90 Days
SAM Operational Metrics	Open Calls by Queue Fault Code Analysis Engineer Utilization
Supplier Data	Suppliers Taxable Suppliers Suppliers Data Setup
Supplier Performance	Supplier Performance - Yesterday Supplier Performance - Last 7 Days Supplier Performance - Last 30 Days Supplier Performance - Last 60 Days Supplier Performance - Last 90 Days
Work Center Planning Data Integrity	Work Center Data

These operational metrics are provided as samples, and can be customized to suit your own business requirements.

## Default s

The following table lists the s that are provided out-of-box in this release:

Account Codes	Enter Item Data	Monitor Wave Progress
Add Flow Lines	Enter Item Data (2)	Move Cost Set to Simulation
Approve Discrete Orders	Enter Inventory Data	Move Current Cost to GL Cost
Assemble Discrete Order Packages	Enter Item Planning Data	Prepare Global Contracts
Call Activity	Execute Batch Delivery (Local)	Prepare Orders for Export
Close & Export General Ledger	GL Calendars	Process Sales Orders - AR
Close Work Orders	GL Cost Centers	Process Sales Orders - Sales Admin
Consolidate Subsidiary Transactions	Identify Distribution Centers	Process Sales Order - WHSE
Create Bill of Material	Inspect Inventory	Process Scheduled Orders - Logistics
Create Budget	Inspect Production	Process Scheduled Orders - Planning
Create Daybook	Installed Base Collection	Process Sequenced Orders - Logistics
Create Flow Line	Inventory Movement Code	Process Sequenced Orders - Planning
Create Planned Material Purchase	Invoice/Recognize Contract	Process Shipping Containers - Sales Admin
Create Production Line	Issue Inventory	Process Shipping Containers AR
Create Purchase Order	Issue Kanban to production	Process Shipping Containers - Logistics
Create Purchase Requisition	Item Status Code	Received Finished Goods From Production
Create Routings	Link Sites/Activate Cost Sets	Received Material Returns from Production
Create Scheduled Orders	Location Detail	Receive Return from Customer
Create Schedules	Manage Cycle Counts	Receive Return from Production

Create Work Centers	Manage Discrete Production	Release Order to Production
Customer Collection	Manage End User	Reports Discrete Production
Define Exchange Rates	Manage Fixed Assets	Reports Discrete Production (2)
Define Routing Costs	Manage Installed Base	Re-Supply Consignment Materials
Define Tax Environments	Manage Material	Re-Supply Consignment Materials
Define Tax Types	Manage Scheduled Purchasing	Return Updated Costs
Define Tax Usages	Manage Subcontract Releases	Select Global Suppliers
Define Tax Zones	Manage Supplier Loops	Select Global Suppliers (2)
Define Work Centers	Manage Wave Progress	Select Local Suppliers
Deliver from Manual Input	Monitor Discrete Production	Set Up Bills of Material
Deliver to Customer	Manage Discrete Production (2)	Set Up Currency Codes
Edit Customer Data	Monitor Flow Lines	Set Up Customer - Sales
Edit Supplier Data	Monitor Schedule Lines	Set Up Depreciation Books
Engineer Schedule & Availability	Monitor Schedule Lines (2)	Set Up Freight Charges
Enter Costing Detail	Monitor Supplier Performance	Set Up Freight Lists

You can customize these samples to suit your own business requirements

## QAD .NET UI and Terminal Keyboard Shortcuts

The following tables summarize keyboard shortcuts in QAD .NET UI.

### Terminal Mode

These shortcuts can be used in all programs in Character terminal mode.

Keystroke	Action	Description
F2	Help	Display help for current cursor focus.
Ctrl+P	Display user-selected programs	Displays a list of user-selected programs
F1 <i>or</i> Ctrl+X	Next frame	Submit current data in current frame and move to the next frame. Equivalent to Next button click, Go, Enter or Tab in the Character UI.
F4 <i>or</i> Ctrl+E	Exit frame	Exit current frame (Back button click) and move back to previous frame. Equivalent to End in the Character UI.
F5 <i>or</i> Ctrl+D	Delete record	Execute the Delete Record command when valid. (Delete button click.) In a text field, delete a single character.
F7 <i>or</i> Ctrl+R	Recall	Recalls the last saved value in a field.
Shift+?	Clear Date	Clears the value date in date fields.
Enter <i>or</i> Tab	Next field	Move forward to next field within a frame or to next row within a selection list.
Ctrl+U	Previous field	Move back to previous field within a frame or to previous row within a selection list.
Up arrow <i>or</i> F9	Previous record	In a field where next/previous processing is enabled, display the previous record. Equivalent to using the up arrow key in the Character UI.

<b>Keystroke</b>	<b>Action</b>	<b>Description</b>
F10 <i>or</i> Ctrl+J	Next record	In a field where next/previous processing is enabled, display the next record. Equivalent to using the down arrow key in the Character UI.
F3 <i>or</i> Ctrl+T	Insert mode toggle	Toggles insertion mode.
F8	Clear field	Clear the value in a field.
Shift+? <i>or</i> F8	Clear date field	Clear the value in a date field.
Ctrl+F	Field information	Displays information about the current program context, including the field name.
Ctrl+C	Exit program	Close currently running program.
Esc+M	Browse Menu bar	Accesses the browse menu bar. Use the mouse instead in Windows character clients.
F7	Browse options	Opens the browse options window.
Esc+F	Browse Options Toggle	Toggles the Browse Options on and off. Use the mouse instead in Windows character clients.

## .NET User Interface

This section lists general .NET UI interface shortcuts.

<b>Keystroke</b>	<b>Action</b>	<b>Description</b>
Ctrl+R	Run dynamic inquiry	Run a dynamic inquiry. Dynamic inquiries display in a dynamic, hierarchical (bucketed) format that makes them more convenient to use.
Ctrl+E	Export dynamic inquiry to Excel	Export a dynamic inquiry to Excel.
Ctrl+Shift+P	View dynamic inquiry as PDF	View a dynamic inquiry in the PDF format.
Ctrl+M	Activate the menu search bar.	Places the cursor in the menu search bar
Ctrl+F6	Displays a list of active workspaces, from most recently used to least recently used.	The current workspace is highlighted. Hold the Ctrl key and use the down and up arrow keys to scroll through the list. Release the Ctrl key to select the highlighted workspace.
Ctrl+Shift+F6	Displays a list of active workspaces, from least recently used to most recently used.	The current workspace is highlighted. Hold the Ctrl key and use the down and up arrow keys to scroll through the list. Release the Ctrl key to select the highlighted workspace.
Ctrl+Tab	Display a scrollable list of current active windows.	The most recently active window is highlighted. Hold the Ctrl key, use the arrow keys or Tab key to scroll, and release the Ctrl key to select.
Ctrl+Shift+Tab	Display a scrollable list of current active windows.	The least recently active window is highlighted. Hold the Ctrl key, use the arrow keys or Tab key to scroll, and release the Ctrl key to select.
Ctrl+F4	Close current window.	Closes the currently active window.
Alt+L	Run Lookup.	Opens the lookup for the field in which the cursor is placed.
Alt+F4	Exit application.	Close the QAD .NET UI.
Right arrow	Expand parent record	Expands the parent record in a grid when there is one or more child records.
Left arrow	Collapse parent record	Collapses the parent record in a grid when there is one or more child records.

Up arrow	Increment the calendar date by one. Scroll through drop-down menus.	When a date field is selected, increments the date by one day. Scrolls up through drop-down menu records.
Alt+Up/Down arrow	Displays drop-down menu options.	Displays drop-down menu options or displays calendar in date fields.
Down arrow	Decrement the calendar date by one. Scroll through drop-down menus.	When a date field is selected, decrements the date by one day. Scrolls down through drop-down menu records.
Ctrl+Right arrow	Expand a menu group folder.	Expands the menu group in the Applications area when the group has sub-menus (indicated by a +)
Ctrl+Left arrow	Collapse a menu group folder.	Collapse the menu group in the Applications area when the group has sub-menus (indicated by a +)
Space bar	Selects/De-selects field.	Selects or de-selects check fields.
F1	Displays Help.	Displays field help if the cursor is in a field, and the QAD Assist panel if the cursor is not focused on one field.
Alt+Space	Displays application system menu.	Displays the system menu, also displayed by clicking the QAD logo in top right of the menu bar.

## .NET UI Maintenance Screens

These shortcuts apply to non-component based maintenance screens in the .NET UI.

Keystroke	Action	Description
Enter	Sames as Next button	Moves cursor to next key field
Ctrl+Enter	Same as Back button	Moves cursor to previous key field.
CTRL+F	Field Information	Displays Properties dialog for the current field.
Up arrow	Previous value	Displays the previous value for the field.
Down arrow	Next value	Displays the next value for the field.
Ctrl+P	Pivot	Sorts data in a selection list by a different column.
Alt+B	Drill down	Drills down to the lookup for the current field.
Tab	Next field	Moves the cursor to the next key field.
Shift+Tab	Previous field	Moves the cursor to the previous key field.
Space bar	Select field in selection list	Selects the current highlighted field in a selection list.
Page Up	Previous page in selection list	For selection lists which span multiple screen pages, displays the previous page.
Page Down	Next page in selection list	For selection lists which span multiple screen pages, displays the next page.

## Product Structure Maintenance

These shortcuts are specific to Product Structure Maintenance.

Keystroke	Action	Description
Down arrow	Navigate down hierarchy	In Product Structure Maintenance (.NET User Interface mode), navigate downwards in the product structure hierarchy.
Up arrow	Navigate up hierarchy	In Product Structure Maintenance (.NET User Interface mode), navigate upwards in the product structure hierarchy.

Right arrow	Open hierarchy item	In Product Structure Maintenance (.NET User Interface mode), open an item in the product structure hierarchy.
Left arrow	Close hierarchy item	In Product Structure Maintenance (.NET User Interface mode), close an item in the product structure hierarchy

## Enterprise Financials

These shortcuts apply to component-based Enterprise Financials programs.

Keystroke	Action	Description
F3	Balance transaction amounts	In Enterprise Financials transaction grids, place the cursor in the debit or credit field and press F3 to balance the transaction amount.
Ctrl+Z	Undo last action	When creating a record, this cancels the create activity without saving any record details.
Ctrl+S	Save current record	Used when creating or modifying records. Saves the current data
Ctrl+N	Switch to Create activity	Switches to this activity from any other component activity.
Ctrl+B	Switch to View activity	Switches to this activity from any other component activity.
Ctrl+O	Switch to Modify activity	Switches to this activity from any other component activity.
Ctrl+D	Switch to Delete activity	Switches to this activity from any other component activity.
Insert	Insert a row	Inserts a new row into a grid
Delete	Delete a row	Deletes a row from a grid
Tab	Moves the cursor to the next field in a grid or form	Moves the cursor and highlights the next key field on a form or grid.
Shift+Tab	Moves the cursor to the previous field in a grid or form	Moves the cursor and highlights the previous key field on a form or grid.
Enter	Saves the current record	Saves the current record in a Create or Modify screen.
F1	Displays program help	Displays context-sensitive help for the current screen.
F2	Focuses the cursor on the first key field in a grid, and toggles between field and grid	Highlights the first key field in a grid, and toggles to highlight the grid itself.

## QAD Messaging

These shortcuts are specific to the QAD Messaging feature.

Ctrl+N	Create a message	Enabled when you select a Messaging folder.
Ctrl+E	Edit a message	Enabled when you select a message.
Ctrl+S	Send a message	Enabled when you select a message in the Drafts folder.
Ctrl+Shift+R	Restore a message	Enabled you select a message in the Deleted folder.
Ctrl+M	Move a message	Moves messages to different folders.
Ctrl+R	Reply to a message	Reply to the current message.
Ctrl+Shift+A	Reply to all for a message	Reply to all recipients of the current message.
Ctrl+F	Forward a message	Forward the current message.
Delete	Delete a message	Delete the currently selected message.
Ctrl+P	Print a message	Print the current message.
Ctrl+Shift+M	Refresh the message list	Rerfresh the current Inbox folder
Ctrl+G	Send a message	Save the current new message.
Ctrl+S	Save a message.	Save the message (to the Drafts folder)

## Browse Maintenance

Ctrl+N	New browse	Create new browse in Browse Maintenance.
Ctrl+O	Open browse	Open browse in Browse Maintenance.
Ctrl+S	Save browse	Save browse in Browse Maintenance.
Ctrl+D	Delete browse	Delete browse in Browse Maintenance.
Ctrl+T	Add tables	Add tables in Browse Maintenance.
Ctrl+R	Run browse	Run browse in Browse Maintenance.
Ctrl+I	Import browse	Import browse in Browse Maintenance.
Ctrl+E	Export browse	Export browse in Browse Maintenance.
Shift+Delete	Delete multiple browses	Delete multiple browses in Browse Maintenance.

## Browses

Keystroke	Action	Description
Ctrl+S	Browse search panel focus	In a browse, place cursor focus on the search panel.
Enter	Refresh browse with current search conditions	In the browse search panel, refresh the query based on the current search conditions in the browse search panel.
up arrow <i>and</i> down arrow	Set browse search date	In the browse search field, when the field is a date, use the up arrow or down arrow keys to enter the current date and then move up or down from the current date.
Alt+up arrow	First set of browse records	Display first set of records in a browse.
Alt+left arrow	Previous set of browse records	Display previous set of records in a browse.
Alt+right arrow	Next set of browse records	Display next set of records in a browse.
Alt+down arrow	Last set of browse records	Display last set of records in a browse.
up arrow <i>or</i> right arrow	Previous browse record	Select the row previous (above) the current row in a browse.
down arrow <i>or</i> left arrow	Next browse record	Select the row after (below) the current row in a browse.
Tab	Next field in browse toolbar	Move focus to next field or button in browse toolbar.
Shift+Tab	Previous field in browse toolbar	Move focus to previous field or button in browse toolbar.
Alt+ move mouse	Rotate 3D browse chart	Rotate 3D browse chart.
Alt+ move mouse scroll wheel	Zoom 3D browse chart	Zoom 3D browse chart.
Ctrl+F4 <i>or</i> Ctrl+Enter	Exit browse	Close the browse. Cursor must be in browse record display area for this shortcut to take effect.  Note that if the cursor is in the Search panel of a browse, Ctrl+Enter opens and closes the panel.
Ctrl+P	Print browse	Print the current browse.

# QAD .NET UI 2.9 Release Notes

The following sections describe highlights of the 2.9 release in the following areas:

- Installation and Configuration Changes
- Application Changes

## Installation and Configuration Changes

**QAD .NET UI Version:** 2.9

**Product Versions:** QAD Applications 2010 Enterprise Edition and QAD Applications 2010 Standard Edition.

**Microsoft .NET Framework Version:** 3.0

**Operating System:** The QAD .NET UI client runs on Windows XP, Windows Vista, and Windows 7. It can run on 64-bit Windows (Microsoft Windows XP Professional x64 Edition), but only in 32-bit mode.

Some of the changes and fixes are included with the QAD .NET UI 2.9 release, but some may also require a patch (indicated by ECO) to your version of the product.

### client-session.xml File

Data source provider settings in the `client-session.xml` file have been updated to match environment changes in this release. The settings for the `BLFDataSourceProvider` assembly and class namespace have been updated to the following:

```
<Provider>
  <Name>FinancialAPI</Name>
  <Assembly>BaseLibrary</Assembly>
  <Class>BaseLibrary.Reports.BLFDataSourceProvider</Class>
</Provider>
```

If you have upgraded from QAD Applications 2009 Enterprise Edition, to version 2009.1 or to the current release, you must manually apply these settings to the `client-session.xml` file(s) for your .NET UI environment(s).

## Application Changes

### QAD Guide Me

The QAD Guide Me feature provides immediate mouse-over descriptions of fields in both component and non-component programs. The feature is disabled by default. You can enable it and control the length of time it takes to display the field description, as well as the length of time the description is displayed on screen, using Guide Me parameters in the `client-session.xml` file.

Click the More... link to display an extended description of the field, and the Edit link to edit this description in Field Help Maintenance. When editing the description, you can add HTML code to change the description font and background color, and also add URL links to, for example, graphics, PDF files, websites, or process maps.

You can enable the feature by changing the Guide Me parameter in the `client-session.xml` (or in the local `QAD.Client.exe.config` file or on the command line) or by enabling the Guide Me plugin in the `client-bootstrap.xml` file.

## QAD Assistance Panel

The QAD Assistance Panel has been enhanced to improve usability. The left navigation panel has been removed, and procedure help and field help are now displayed in the top and bottom panels respectively. When you launch the Assistance Panel from a program, the field help is always displayed, with the context-sensitive help for the current field in the bottom panel. You can now also select help for other fields in the screen from the Available fields drop-down list. The previous Search for field help field is now hidden, and can be restored by modifying the Assistance Panel `help.css` file.

## Field Help Maintenance

In previous releases, when creating a field help entry using Field Help Maintenance (36.4.13.1), you were limited to 15 lines of text in the Text field. This restriction is removed in QAD Applications 2010 Enterprise Edition.

## Attachment Maintenance

When creating attachments for fields using Attachment Maintenance, you were previously limited to one attachment area for a program. You can now create attachment areas for multiple fields in a program, and can create attachment areas for fields in different frames, which are displayed when the specific frame is opened. Attachment areas are also automatically created for lookup fields when the lookup browse has been defined with an Edit link option. In this case, the automatic attachment area is created for the Edit program to which the lookup is linked, and is displayed in every program in which the lookup is used. You use Browse Link Maintenance to view edit links for programs.

## Export Data to .CSV

A new Export to .CSV option exports the contents of the current browse to a comma-separated-value (.CSV) file, which you can open in supporting spreadsheet applications. The feature exports only browse columns that are marked as visible, which lets you exclude columns from the export by hiding those columns on the browse grid. Grouping that you apply to browses is also preserved in the exported file.

## Browse Search Criteria

When selecting search criteria in a browse, you can now use database fields of the same type as filters. For example, you can filter a browse to retrieve records for which Sold-To equals Ship-To, Date Due is greater than Date Shipped, or Quantity Ordered is greater than Quantity Shipped. This option is toggled by the Search Variable Tip button.

## Browse URL Link to Help

You can now also use the following commands to launch the Assistance Panel from the command line:

```
qadsh://help/search
```

This command opens the Assistance Panel on the default Search page.

```
qadsh://help/home
```

This command displays the table of contents page for the QAD .NET UI.

```
qadsh://help/search?q=sosomt.p
```

This command displays the Assistance help for the Sales Order Maintenance program

## Process Editor

When loading an image into a process map node using Process Editor, you can only select images that are stored on the server. For security reasons, the Microsoft Silverlight browser prevents you from selecting an image stored on a local drive.

## qadsh:// URL Enhancements

New options for the `qadsh:// URL` syntax let you use a `qadsh:// URL` to run reports developed using the QAD Reporting Framework, in a similar way to running browses.

The `report-code` parameter lets you specify a report to run by its report code. You can also use an optional `label` parameter to specify an alternative label for the program tab displayed when the report is run. For example, in the following command:

```
qadsh://report/invoke?report-code=QAD_PrintCallQuote&label=Call%20Quote%20Print%20Sample
```

`report-code` is the code from Report Resource Maintenance and `label` specifies the report label. The URL-encoded value for blank spaces between characters is `%20`.

You can also use the `report-search` parameter to specify optional search conditions to be used when running the report. Use the following syntax for this option:

```
report-search=<table>,<field>,<operator>,<value>
```

You can also specify a range of values for a report field, using the range operator:

```
report-search=<table>,<field>,range,<fromValue>,<toValue>
```

where `<fromValue>` and `<toValue>` specify the value range returned in the report.

In the following example:

```
qadsh://report/invoke?report-code=QAD_PrintCallQuote&report-search=tt_ca_mstr,ca_bill,=,10000
```

the command runs the Call Quote Print Sample report, and the Bill To field (`tt_ca_mstr.ca_bill`) is auto-populated with the value 10000.

You can add as many `report-search` parameters to a report `qadsh:// URL` as required.

An `autorun=true` can also be added to the command for the report, which causes the report to automatically run when launched, avoiding the need to click Run on the toolbar.

You can also run reports by their menu key using the following syntax:

```
qadsh://menu/invoke?menu-key=<menu>&menuitem-key=<menu item>&report-search=<table>,<field>,<operator>,<value>
```

## Restricting Configurable Screens by Domain

By default, the Configurable Screens function does not take into account the user's domain when providing access to the Configurable Screens templates. This means that if you have access to a template in one domain, access is granted across all domains. You can now restrict this function by domain by re-setting the `configByDomain` parameter in the `setting.dat` files for the environment.

The `setting.dat` files are located in two directories:

```
QADInstallDir/qadui/com/mfgpro, and QADInstallDir/qadui/com/qad/mfgpro
```

You must apply this change to both files. You complete the change by logging back into the application and restarting Connection Manager in the Connection Manager option.

## Exporting Browsers to PDF in Japanese and Chinese Languages

When you export a browse to PDF that contains Japanese or Chinese language characters, the characters do not display correctly in the resulting PDF. You can work around this issue by changing the Cell Font in Tools|Options to a font that supports these languages (for example, Arial Unicode MS). This ensures the body text in the PDF is correctly displayed, although it may not resolve text in the PDF title area. You can also resolve the issue by printing the browse to a printer that uses a PDF driver.

## Limitation on Entering Chinese Characters in Terminal Mode

In the current release, you cannot enter Chinese characters when working in terminal mode.

## Excluded Programs

Some programs cannot be run in the QAD .NET UI and are only available in Terminal mode. The following is the current list of programs that execute in a telnet display only:

- Set Multiple BOL Print Utility (7.25.2, utsoship.p)
- Required Ship Schedule Update (7.5.5, rcrsup.p)
- Call Queue Manager (11.1.6, fsquemg.p)
- Escalation Monitor (11.1.13.13, fsesmgr.p)
- Change Deferred/Accrued Accounts (11.5.13.25.4, uxssmen3.p)
- End User Time Zone Change Util (11.21.22.20, uteutz.p)
- Server Time Zone Change Util (11.21.22.22, utsrvrtz.p)
- Multiple Time Zones Startup Util (11.21.22.24, utmtzon.p)
- GLRW Mismatch A/C Code (25.25.8, utgrdel.p)
- Initial Euro Exchange Rate Copy (26.21.1.2, etratecp.p)
- GL Integrity Report (26.21.1.12.1, etinglrp.p)
- AP Integrity Report (26.21.1.12.4, etinaprp.p)
- PO Integrity Report (26.21.1.12.6, etinporp.p)
- Inventory Integrity Report (26.21.1.12.8, etininrp.p)
- WIP Integrity Report (26.21.1.12.9, etinwirp.p)
- Fixed Assets Integrity Report (26.21.1.12.11, etinfarp.p)
- Combined Integrity Checks (26.21.1.12.12, etincbrp.p)
- Accounts Not To Convert Maint. (26.21.1.13, etexacmt.p)
- Count Program (26.21.1.18, etcount.p)
- Ship-From to AR (27.25.1, utshipfm.p)
- Trading Partner Library Load (35.17.7, edtpload.p)
- Trading Partner Library Unload (35.17.8, edtpdstr.p)
- Database Connect (36.6.13, mgdccn.p)
- Database Disconnect (36.6.15, mgdcdc.p)
- Send Export Documents (36.8.7, qqsnd.p)

- Receive Import Documents (36.8.9, qqrcv.p)
- Process Import Documents (36.8.10, qqimprc.p)
- Debug CIM Document (36.8.11, qqimdebug.p)
- Dump Export/Import Doc for Edit (36.8.13, qqdp.p)
- Reload Edited Export/Import Doc (36.8.14, qqld.p)
- Export/Import Document Query (36.8.16, qqbr.p)
- Create Records for Printer Output (36.13.25.1, uxprup.p)
- CIM Data Load Process Monitor (36.15.4, mgbdmon.p)
- Database Table Size Inquiry (36.16.1, mgdbiq.p)
- Archive File Reload (36.16.5, mghstld.p)
- License Registration (36.16.10, lvreg.p)
- Sequence Maintenance (36.16.13, mgsqmt01.p)
- Exit to Operating System (36.24.1, mgoscall.p)
- Program/Text File Display (36.24.4, mgfdsply.p)
- Compile Programs (36.25.1, utcompil.p)
- Convert Ship Qty in Ship UM (36.25.16, uxshipum.p)
- Field Eligibility Maintenance (36.25.22, mgfldcmt.p)
- Program Level (36.25.24, mpggmlvl.p)

# QAD .NET UI 2.8.2 Release Notes

The following sections describe highlights of the 2.8.2 release in the following areas:

- Installation and Configuration Changes
- Application Changes

## Installation and Configuration Changes

**QAD .NET UI Version:** 2.8.2

**Product Versions:** QAD Enterprise Applications 2009 and 2009.1–Enterprise Edition

**Microsoft .NET Framework Version:** 3.0

**Operating System:** The QAD .NET UI client runs on Windows XP and Windows Vista. It can run on 64-bit Windows (Microsoft Windows XP Professional x64 Edition), but only in 32-bit mode.

Some of the changes and fixes are included with the QAD .NET UI 2.8.2 release, but some may also require a patch (indicated by ECO) to your version of the product.

## Importing and Exporting Shell Data Between Different QAD .NET UI Environments

When migrating from one QAD .NET UI version to another, you can transfer your UI configurations or shell states to the new environment. Shell data—such as menus, process maps, and attachments—is stored in the following formats:

- As .xml files
- As Progress database records
- As binary .dat files

These include both application-specific data, such as labels and messages, and user-defined data, such as Favorites or user-defined browses. You use a number of tools to import or export these data types to the new environments. The following table describes the shell data types and their locations.

**Table 2**  
Shell States and Data Files

Shell State	Description
Menus	You can use Menu System Maintenance (36.4.4) to assign menu labels and programs to menu numbers, and in this way create your own custom menus. These custom menus are defined in the following file: <i>TomcatInstallDir/webapps/qadhome /configurations/&lt;Environment Name&gt;/menu/plugin-menu.xml</i> The database records created by use of custom menus are stored in <i>mnd_det</i> and <i>mnt_det</i> records in the <i>qaddb</i> database.
Labels and Messages	The system reads the source code to determine the labels to display on non-component based programs and reports or, when Translate Frames is selected in Label Control (36.4.17.24), reads the label master table. You can use Label Master Maintenance (36.4.17.1) to modify existing program labels, and Label Detail Maintenance (36.4.17.5) to assign terms and labels defined in Label Master Maintenance to fields generically or to fields in specified programs. These modifications are stored as <i>lbl_mstr</i> records in the <i>qadadm</i> database. You can modify standard messages in Message Maintenance (36.4.6.1) and these modifications are stored as <i>msg_mstr</i> records in the <i>qaddb</i> database.
Field and Program Help	You can use Field Help Maintenance (36.4.13.1) and Field Help Name Change (36.4.25.3) to supplement the standard help with company-specific information. These modifications are stored as records in <i>flh_mstr</i> and <i>flhd_det</i> tables in the <i>qadhlp</i> database.

Shell State	Description
Process Maps	Process maps are saved as individual XML files and are stored in the <i>QADDesktopBase/webapps/WEB-INF/pronav/xml</i> folder.
Favorites Menu	Favorites are stored in <i>TomcatInstallDir/webapps/qadhome/configurations/&lt;EnvironmentName&gt;/storage/user-data/&lt;userid&gt;/&lt;domain&gt;</i> , where subdirectories based on user ID and domain contain <i>UserMenu.dat</i> files that include Favorites information.
Attachments	The attachments you create are stored in <i>TomcatInstallDir/webapps/qadhome/configurations/&lt;EnvironmentName&gt;/storage/attachments</i> , where subdirectories organize the attachments based on domain, program, type, and field. Each directory includes an underscore character ( <i>_</i> ) at the end by default to account for the possibility of using a blank.
Menu Collections	Use Menu Collection Maintenance to define collections of menu items such as programs, browses, process maps, and dashboards. Menu collections are stored in <i>TomcatInstallDir/webapps/qadhome/configurations/&lt;EnvironmentName&gt;/storage/menucollections</i> . Each menu collection is assigned a unique ID by the system.
Browses	Browses are stored in an XML-based file format with the <i>.brwx</i> file extension. You can export browses, import browses, and delete multiple browses from the Actions menu in Browse Maintenance (QAD .NET User Interface mode).
s	s are stored as individual XML files in <i>TomcatInstallDir/webapps/qadhome/configurations/&lt;EnvironmentName&gt;/storage/browse-collections</i> . Each is assigned a unique ID by the system.
Browse State Data	You can add state data (for example, charts or summaries) to a browse. When you then drill down by right-clicking on the browse running inside Collection Maintenance, the system saves that state with the collection. Each state is saved as an XML file with the <i>in a TomcatInstallDir/webapps/qadhome/configurations/&lt;EnvironmentName&gt;/storage/user-data/&lt;userid&gt;/browse-state</i> folder.
Browse Drill, URL, and Program Links	Browse drill-downs, URL links, and program links are saved as records in the <i>drl_mstr</i> (for drills to other browses) and <i>url_mstr</i> (URL and program links) tables in the <i>qadadm</i> database.
GoTo Programs	GoTo links are saved as individual records in the <i>utd_det</i> table of the <i>qadadm</i> database.
Configurable Screen Definitions	Configurable screen template changes are saved as individual XML files in program-specific directories and as <i>genfld_m .d</i> records in the <i>qadadm</i> database.
Reports created in Report Framework	Reports created in Report Framework are saved as Report Resource Object (RRO) records on the <i>qadadm</i> database. An RRO contains the entire definition of the report, and can be exported and imported using the Report Resource Export and Import utilities. The Export utility exports the RRO as an <i>.xml</i> file, which can then be imported into another target system.
Beautified Reports	When enhancing reports, the selected reports that display in the enhanced format are specified in the <i>BeautifyReports.lst</i> file. This file is located in <i>QADInstallDir/qadui/com/mfgpro</i> .

## Migration Tools

Use standard UNIX commands to navigate to the file location and perform the file copy.

To dump and load Progress *.d* files that contain data, use the following steps:

- 1 Start the Progress editor program that is connected to the database from which you want to dump data.
- 2 In the Tools|Data Dictionary menu item, select Database|Select Working Database to choose the required database from the list of connected databases.
- 3 Choose Admin|Dump Data and Definitions to dump data.
- 4 Select the Table Contents (*.d* file) option.
- 5 Select the specific *.d* file.

- 6 Complete the data dump.
- 7 Disconnect from the current database and connect to the database into which you want to load the data.
- 8 Go to Admin|Load Data And Definitions to load data from a .d file.
- 9 Choose the Table Contents (.d file) option.
- 10 Select the .d file and complete the data load.

Use this procedure when loading data into a database in which QAD OIDs are not used.

If OIDs are used in the database, the OIDs of the records in the .d being loaded may conflict with OIDs from records in the target database, which will cause errors. In this case, you should use a custom Progress program that loads the data without including the OID in the load process.

## Application Changes

### Home Page URL and Operational Metrics

The system displays an error when you attempt to specify an operational metric as your UI Home Page using Tools|Options, Home Page URL. To automatically display an operational metric when you log in to the UI, you can add the metric to Favorites. You can then select the metric in the Favorites area and right-click to select Auto Start. The metric is then automatically displayed when you next log in.

### Attachment Maintenance

When you create a document type in Attachment Maintenance, you can only remove this document type from the user interface by deleting the entry in the `DocumentAttachData.xml` file on the server. This file is located in the following directory:

```
TomcatInstallDir/webapps/qadhome/configurations/configuration/  
storage/attachments
```

### Document Export Data

The Actions|Export Data function has been enhanced with a visual indicator of the recording progress. An Export Data screen is displayed (minimized) on the screen while the system is recording your user actions. Each user action is immediately listed in the Actions grid of this screen, and you can pause, name, and save the recording in this dialog. The Options menu in the Export Data dialog lets you define the data being recorded. Select Record Changes Only to record changed values only, or Record All to record all of your actions, including the values you select during navigation.

### QAD Shell Enhancements

The following options have been added to the QAD Shell function, which you use to access QAD .NET UI using pre-defined URLs:

- &target=tab. Open the program in tab view.
- &target=tabgroup/Sales. Open in a tab group with a user-defined group name (for example, Sales).
- &target=window. Open in a detached window.
- &target=fullscreen. Open in full screen mode.

**Example** The following URL displays Sales Order Maintenance in full screen mode:

```
qadsh://menu/invoke?menuitem-key=7.1.1&target=fullscreen
```

The keyboard command Ctrl+F11 reverts the screen to normal display.

## Configuring Lookups for Multiple Return Values

The majority of field lookups in Character mode return one value to the calling field. However a number of fields return values to several screen fields. You can now provide this functionality for QAD .NET UI screens.

This can be accomplished by editing the `lookupreturnfields.xml` file, which is stored in `tomcat/webapps/<appname>/net/lookups/`.

The format of each entry is as follows:

```
<program name="<program name>" screenid="<frame:field>" lookupfield="<lookup field>">  
  <returnvalue screenfield="<screen field>" fieldinlookup="<field in lookup>" />  
</program>
```

`<program name>` is the menu-level program name.

`<frame:field>` is a combination (separated by a colon) of the frame name and the first enabled field on that frame.

`<lookup field>` is the name of the field that the lookup is attached to. Use Ctrl+F to view the name of the field.

`<screen field>` is the name of the field that the lookup should return data to. Use Ctrl+F to view the name of the field.

`<field in lookup>` is the field in the lookup that the data will be returned from. It can be determined by running the lookup, right-clicking on the column of the data you are interested in returning, and selecting Properties.

If you require more than one additional return value, add another `<returnvalue>` element with the appropriate attributes.

Once you have added your data into the XML document, save it, close down the QAD .NET UI, and then restart the application.

The `lookupreturnfields.xml` file contains a number of examples of the above format.

If the QAD .NET UI version is 2.8 or greater running on QAD Enterprise Applications SE SP10 and above or QAD Enterprise Applications EE SP5 and above, you can also enable this feature using Drill-Down/Lookup Maintenance (36.4.8.1), which has additional fields that provide this functionality.

## MRP Summary Inquiry

When the value in a summary row of a dynamic inquiry has too many characters to be displayed in the column, you can now resize the column width by dragging the borders of the title cells.

## Client Session Configuration File Update

The `client-session.xml` file has been enhanced with the following new parameters:

```
<GoOnLastField>>false</GoOnLastField>
```

This parameter determines that when you exit the last field on a frame, the frame automatically shuts.

```
<RequestTimeout>30</RequestTimeout>
```

This parameter sets the number of seconds after which a web request times out. The range is 10 to 120 seconds.

These parameters are available in the <Desktop> element of the file.

## Browse Maintenance

### Add Tables Dialog

When you click New to create a new browse, the Add Tables dialog is automatically displayed. This enhancement lets you select the tables for the browse immediately.

### Table Indexes Dialog

To provide additional information to the user when creating Browse Definitions, you can now view the indexes defined for a table in the database schema. Right-click a browse table and select Table Indexes to display the context menu.

Each table index is displayed in a separate tab, with the index name as the tab caption. The tab displays the index attributes and the table fields that make up the index. The sequence, field name, and sort type is listed for each field. The view also details whether the index is primary, unique, and active.

### Filter Field Character Limit

The description of the Filter field on the Query tab in *User Guide: QAD User Interfaces* incorrectly gives the character limit of a filter as 255. You can enter up to 512 characters in a filter expression in this field.

### Browse Definitions and Program Information

When you create, modify, or delete a browse, the system now includes an entry for the activity in Program Information Browse. Browsers you create or modify are immediately listed in the Program Information Browse, and are removed from this list when you use Delete or Multiple Delete.

### Browse Maintenance Usability

There are a number of Browse Maintenance usability enhancements in this release. The Run Browse toolbar option has been renamed Run, and icons for the Run, GoTo, and Actions options have been added to the toolbar. You can now also open a browse definition by entering the name in the Browse Open field on the toolbar. This field is displayed by simply clicking the Browse Name <Unspecified> label on the toolbar, or by using the shortcut Ctrl+Shift+O.

## Browse Collection Maintenance

When you select a browse collection in the Collections folder in the Applications area of the desktop, a new right-click Design option lets you open the collection directly in Browse Collection Maintenance. This option lets you modify collection properties from the desktop without having to run the maintenance program.

## Background Color in Terminal Mode

The system prevents you from running a maintenance program in Terminal mode when you have selected Transparent as the background color in Tools|Options|Terminal. This restriction does not apply to any other background color.

## Quick Search User Permissions

A new Properties option for saved quick searches allows you to make the quick search available to all other users (globally) or to the current user only (locally). Right-click the name of the quick search, and select Assign to all Users in the Properties dialog to make the quick search available globally.

## Exporting Browsers to Excel

*User Guide: QAD User Interfaces* incorrectly states that if you have grouped data in a browse that you then export to Excel, the grouping is preserved in Excel as pivot tables. Grouped data is, instead, preserved in the spreadsheet as a collapsible outline.

# QAD .NET UI 2.8.1 Release Notes

The following sections describe:

- 2.8.1 installation and configuration changes
- 2.8.1 application changes

## Installation and Configuration Changes

**QAD .NET UI Version:** 2.8.1

**Product Versions:** QAD Enterprise Applications 2009–Standard Edition.

**Microsoft .NET Framework Version:** 3.0

**Operating System:** The QAD .NET UI client runs on Windows XP and Windows Vista. It can run on 64-bit Windows (Microsoft Windows XP Professional x64 Edition), but only in 32-bit mode.

Some of the changes and fixes are included with the QAD .NET UI 2.8.1 release, but some may also require a patch (indicated by ECO) to your version of the product.

### Installing QAD Assist

QAD Assist, introduced in QAD .NET UI 2.8 (see “QAD Assist” on page 50), provides online help for the QAD .NET UI and for QAD Enterprise Applications.

The QAD .NET UI 2.8.1 release media includes the QAD Assist content for both the QAD .NET UI and QAD Enterprise Applications 2009–Standard Edition (eB2.1 SP9).

To install QAD Assist, you need to install and configure two Web applications that are included on the release media in the `/zips` directory:

```
/zips/epub.war  
/zips/search.war
```

Use the following steps to install QAD Assist. Note that the following steps are based on using a Linux environment with JDK 1.6.

- 1 Shut down Tomcat.
- 2 Copy `epub.war` and `search.war` from the `/zips` directory on the release media into the `/webapps` directory.
- 3 Start Tomcat.
- 4 Copy the content from the release media’s `zips/content/*` directory to the `/webapps/epub` directory.

Note that the QAD Assist content for the QAD .NET UI 2.8.1 and QAD Enterprise Applications 2009—Standard Edition (eB2.1 SP9) is included on the release media in the `/zips/content` directory.

The QAD User Interfaces User Guide content is available in `netui-en-2.8.1.zip`.

The QAD Enterprise Applications 2009–Standard Edition content, which includes program help, field help, and user guides, is available in `.zip` files for the following languages:

- German: `erp-de-2009se-sp9.zip`
- English: `erp-en-2009se-sp9.zip`

- Spanish (Castillian): `erp-es-es-2009se-sp9.zip`
- Spanish (Latin American): `erp-es-mx-2009se-sp9.zip`
- French: `erp-fr-2009se-sp9.zip`
- Italian: `erp-it-2009se-sp9.zip`
- Japanese: `erp-ja-2009se-sp9.zip`
- Portuguese (Brazilian): `erp-pt-br-2009se-sp9.zip`
- Chinese (Simplified): `erp-zh-cn-2009se-sp9.zip`
- Chinese (Traditional): `erp-zh-tw-2009se-sp9.zip`

**5** Unzip the content using the `unzip` command.

For example, for `netui-en-2.8.1.zip`, enter:

```
unzip netui-en-2.8.1.zip
```

Unzipping creates a `/netui` directory under the `/epub` directory containing the content.

You next set up the search engine index.

**6** Using a web browser, access the search administration page URL.

Open `http://host:port/search`, where `host` and `port` are the host and port for the Tomcat instance under which you installed the `epub` and search Web applications.

**7** Click the New Index button and in the field enter:

```
default
```

This creates a new index and directory in the following location:

```
search/WEB-INF/indexes/default
```

Next, you need to add index (links) content to the search engine by copying the `links_*.xml` files (which contain the default link information for the search engine index) under `/epub` to `/search/WEB-INF/indexes/default`.

You can use the following command to copy all the files that match `'links-*.xml'` into the directory.

**8** Using a command line, navigate to the `/epub` directory and enter:

```
cp `find . -name "links-*.xml"` ../search/WEB-INF/indexes/default
```

The search engine automatically imports these files and removes them upon completion.

The search administration page (`http://host:port/search`) updates the information about the default index, including the number of documents in the Documents column and the total size under the Size column.

Note that you can import the same content multiple times without affecting the number of documents loaded into the search engine, although that action will increase the allocated file size. In the Actions column, you can click Optimize to reclaim the excess disk space.

To load the default index, you must stop and start the search engine for that index:

**9** In the Actions column for default, click Stop.

**10** In the Actions column for default, click Start.

Finally, you need to update the `client-session.xml` file.

**11** Edit the `client-session.xml` file

(`<HomeServer>/configurations/<SysEnvName>/client-session.xml`) so that it includes the following settings:

```
<ContentIndexServer>http://host:port/search</ContentIndexServer>
<ContentIndex>default</ContentIndex>
<ePublisherServer>http://host:port/epub</ePublisherServer>
```

The Assist feature's search is now ready for use. You can access it from the QAD .NET UI by choosing Help|QAD Enterprise Applications User Interface Help or pressing the F1 key.

## Metrics and QAD Reporting Framework Materials

In QAD .NET UI 2.8.1, the release media includes the directory `/notes`, which contains support materials for metrics and reporting.

- The `/notes/Metrics` directory includes the following sub-directories:

`/notes/Metrics/metrics`. This contains XML files that define metrics.

`/notes/Metrics/se_browse`. This contains browse definitions to support the metrics.

To install the metrics:

- a Copy the folder `/metrics` to the HomeServer configuration storage location.

For example, if the configuration name is `qadui`, you copy `/metrics` to `$TOMCAT/webapps/qadhome/configurations/qadui/storage`.

- b Import each of the browse definition files in the `se_browse` folder using the Browse Maintenance import program. However, if you are using QAD .NET UI 2.8.1 with QAD Enterprise Applications 2009–Standard Edition (eB2.1 SP9), you do not need to load these browses because they are already included. You only need to import these browse definitions if you are using QAD .NET UI 2.8.1 with the following:

- QAD eB2.1 SP4
  - QAD Enterprise Applications 2007 (eB2.1 SP5)
  - QAD Enterprise Applications 2007.1 (eB2.1 SP6)
  - QAD Enterprise Applications 2008–Standard Edition (eB2.1 SP7)
  - QAD Enterprise Applications 2008.1–Standard Edition (eB2.1 SP8)
- The `/notes/report` directory includes support materials for the QAD Reporting Framework. The QAD Reporting Framework is only available by means of a Services engagement with QAD.

## Browses for Product Structure Maintenance

To run Product Structure Maintenance successfully, the system must contain the browse programs `psbr001.p` and `psbr002.p`. These browses are included with QAD Enterprise Applications 2009–Standard Edition (eB2.1 SP9). However, if you are using a prior version, these browses are included in the release media in the directory `/notes/ps_maint`. You can use the Browse Maintenance Import function to import these browses.

## User Limitation for Windows Servers

The Database Requirements section of *Installation Guide: QAD .NET User Interface* previously stated that the number of users on Windows servers was limited to 30. This restriction does not apply, and there is no limit to the number of users on a Windows server.

## Application Changes

This section covers application changes for QAD .NET UI 2.8.1 deployments.

### Browse Maintenance Enhancements

The Expression field in Field Properties, in which you specify the syntax for the variable when the field is a local variable, was previously limited to 80 characters. This limit has now been increased to 512 characters.

### Displaying and Accessing Process Maps

When a process map is defined as the Home Page URL in Tools|Options, the process map is displayed even when security for the Process Map function has been restricted for this user. This means that the user can view the process map, but cannot access individual nodes within the map. To prevent restricted users from trying to access process maps, system administrators can disable the process map URL in the Tools|Options Home Page URL option.

### Operational Metrics Enhancements

#### Operational Metrics Licensing

QAD Active Maintenance is a new feature that provides access to enhancements and new functionality by means of a Support license key.

Operational Metrics is now provided through Active Maintenance, and you now require the Active Maintenance license key in order to use this function. The license key is available on the QAD Support Web site at the following URL:

[https://support.qad.com/license\\_keys/activemaintenance](https://support.qad.com/license_keys/activemaintenance)

Click the `Term License Key Request` link to receive the Active Maintenance license. The Support Web site requires your Support login information.

#### Display Enhancements

You can now display operational metrics results broken down by field by selecting from a list of available field names. The new Break By feature, which you access by right-clicking on an individual metric result, displays the available fields in this browse. Select a field to view metrics for that field. For example, if the metric is of Customers, you can choose to break by state, which displays a metric for customers by state in a separate window.

You can also preview the contents of a browse before selecting it to be used for a metric. Click on the hyperlinked metric group name to display the browse results window.

#### Metrics Configuration

You can also modify the metric and metric images configuration using the following parameters in the `client-session.xml` file:

```
<!-- Metric Parameters-->
<Metrics>
  <!-- Max records for count metrics -->
  <MaxBrowseRecordsForCount>100000</MaxBrowseRecordsForCount>
```

```
<!-- Max records returned to client when requested -->
<MaxBrowseRecordsReturned>50000</MaxBrowseRecordsReturned>
<!-- Show title and date on saved images -->
<ShowTextOnImage>>true</ShowTextOnImage>
<!-- The font used on saved images -->
<ImageFont>MS Gothic, 8.5pt</ImageFont>
</Metrics>
```

## Maximum Input for Range Feature

The maximum range you can apply to a metric is six characters; a character range larger than this is truncated. For example, if the maximum range for records is set to 1,000,000, only 100,000 is displayed on the metric.

## Expand and Collapse Metric Features.

You can now use Expand All and Collapse All buttons for large metrics. These buttons let you display or hide the percentage bar.

## Adding Metrics to Workflow

You can now add metrics to a workflow. This lets you use the Workflow function to pass metrics to other individuals or departments for review and analysis.

## Metrics Groups List

Operational metrics groups are now displayed in the Applications pane in an editable list, which you can reorganize to launch metrics in the order you require.

## Slider Enhancement

On the color slider, you can now either set the start and end values as percentage values or as a range of absolute values. In the Edit Metric window, after the Type settings, use the pull-down to choose Percent for percentage values or Range for a range of absolute values.

## Outputting Reports to Text

A new Text Output Font option in the Desktop section of the Tools|Options menu lets you specify the font in which reports are displayed when outputted to text.

# QAD .NET UI 2.8 Release Notes

The QAD .NET UI 2.8 Release is available for:

- QAD eB2.1 SP4
- QAD Enterprise Applications 2007 (eB2.1 SP5)
- QAD Enterprise Applications 2007.1 (eB2.1 SP6)
- QAD Enterprise Applications 2008–Standard Edition (eB2.1 SP7)
- QAD Enterprise Applications 2008.1–Standard Edition (eB2.1 SP8)

In this section, when an update applies to all these deployments, they are referred to as Standard Edition.

The QAD .NET UI 2.8 Release is also included with QAD Enterprise Applications 2009–Enterprise Edition.

The following sections describe:

- 2.8 installation and configuration changes
- 2.8 application changes

Some changes are specific to product versions, as noted in the description text.

## Installation and Configuration Changes

**QAD .NET UI Version:** 2.8

**Product Versions:** QAD eB2.1 SP4, QAD Enterprise Applications 2007 (eB2.1 SP5), QAD Enterprise Applications 2007.1 (eB2.1 SP6), QAD Enterprise Applications 2008–Standard Edition (eB2.1 SP7), QAD Enterprise Applications 2008–Standard Edition (eB2.1 SP8), QAD Enterprise Applications 2009–Enterprise Edition.

**Microsoft .NET Framework Version:** 3.0

**Operating System:** The QAD .NET UI client runs on Windows XP and Windows Vista. It can run on 64-bit Windows (Microsoft Windows XP Professional x64 Edition), but only in 32-bit mode.

Some of the changes and fixes are included with the QAD .NET UI 2.8 release, but some also require a patch (indicated by ECO) to your version of the product.

### Installing QAD Assist (Standard Edition)

**Note** In Enterprise Edition, QAD Assist is installed automatically as part of the QDT installation process.

To install QAD Assist for Standard Edition, you need to install and configure two Web applications that are included on the release media in the `/zips` directory:

```
/zips/epub.war  
/zips/search.war
```

Use the following steps to install QAD Assist. Note that the following steps are based on using a Linux environment with JDK 1.6.

- 1 Shut down Tomcat.
- 2 Copy `epub.war` and `search.war` from the `/zips` directory on the release media into the `/webapps` directory.

- 3 Start Tomcat.
- 4 Copy the content from the release media's `zips/content/*` directory to the `/webapps/epub` directory. For example, copy `netui-en-2.8.zip` to `/webapps/epub`.

- 5 Unzip the content.

For example, enter:

```
unzip netui-en-2.8.zip
```

Unzipping creates a `/netui` directory under the `/epub` directory containing the content.

You next set up the search engine index.

- 6 Using a web browser, access the search administration page URL.

Open `http://host:port/search`, where `host` and `port` are the host and port for the Tomcat instance under which you installed the epub and search Web applications.

- 7 Click the New Index button and in the field enter:

```
default
```

This creates a new index and directory in the following location:

```
search/WEB-INF/indexes/default
```

Next, you need to add index (links) content to the search engine by copying the `links_*.xml` files (which contain the default link information for the search engine index) under `/epub` to `/search/WEB-INF/indexes/default`.

You can use the following command to copy all the files that match `'links-*.xml'` into the directory.

- 8 Using a command line, navigate to the `/epub` directory and enter:

```
cp `find . -name "links-*.xml"` ../search/WEB-INF/indexes/default
```

The search engine automatically imports these files and removes them upon completion.

The search administration page (`http://host:port/search`) updates the information about the default index, including the number of documents in the Documents column and the total size under the Size column.

Note that you can import the same content multiple times without affecting the number of documents loaded into the search engine, although that action will increase the allocated file size. In the Actions column, you can click Optimize to reclaim the excess disk space.

To load the default index, you must stop and start the search engine for that index:

- 9 In the Actions column for default, click Stop.

- 10 In the Actions column for default, click Start.

Finally, you need to update the `client-session.xml` file.

- 11 Edit the `client-session.xml` file

(`<HomeServer>/configurations/<SysEnvName>/client-session.xml`) so that it includes the following settings:

```
<ContentIndexServer>http://host:port/search</ContentIndexServer>
```

```
<ContentIndex>default</ContentIndex>
```

```
<ePublisherServer>http://host:port/epub</ePublisherServer>
```

The Assist feature's search is now ready for use. You can access it from the QAD .NET UI by choosing Help|QAD Enterprise Applications User Interface Help or pressing the F1 key.

## Configuring the Progress-Based Field/Program Help Search Field (Standard Edition)

In release 2.8, the QAD Assist screen displays a Search field in the menu bar on the top right, which you use to search the HTML-based Help content.

In Enterprise Edition, this HTML help contains user guides, field and procedure help, and you can search across the range of these content sources.

In Standard Edition, this HTML help contains the .NET UI user guide only. The field and procedure help is Progress-based and is not included in HTML format.

In QAD .NET UI releases 2.5.x and 2.7.x, the Help screen has a Search field on the left of the Screen above the Procedure Help link and Fields area, which you use to search the Progress-based field and procedure help labels. This search field for Progress-based help is not displayed by default in the 2.8 release, and you must enable it in order to search field and procedure help labels when using Standard Edition in the 2.8 release.

You make the field visible by modifying the `help.css` file in the `TomcatHome/webapps/.../css` directory.

Edit the file as follows:

1 Open `help.css` using `vi` or some other text editor.

2 Change the last line of the file:

```
.helpSearchTitle, .processMapsPanel {display:none;}
```

to the following two lines:

```
.helpSearchTitle {display:inline;}
```

```
.processMapsPanel {display:none;}
```

This displays the Progress-based Search field in the Assist window.

Note that this does not display the related process map display listing.

3 Finally, clear the cache by choosing Tools|Delete History to ensure that the client displays the changes correctly.

## Product Structure Maintenance (Standard Edition)

To run Product Structure Maintenance successfully, the system must contain the browse programs `psbr001.p` and `psbr002.p`. These browses are included in the release media in the directory `/notes/ps_maint`. You can use the Browse Maintenance Import function to import these browses.

## Configuring Process Maps for Service Packs (Standard Edition)

To display Process Maps as menu items, you configure the UI in two different ways, depending on the service pack:

- For SP4 and SP5, you include the process maps as entries in the `plugin-menu.xml` file.

The format for adding a process map using the `<ShellMenuItem>` element is as follows:

```
<ShellMenuItem key="process.N" label="ProcessMapName" image="ProcessMap">
<Command type="QAD.Commands.ProcessViewerCommand">
<Parameter value="{DesktopBaseUrl}/ProcessViewer.jsp?ProcessName=ProcessMapName" type=
"System.Uri, System"/>
<Property name="Text" value="ProcessMapName"/>
</Command>
</ShellMenuItem>
```

You must also include references to the process name in the `<ShellMenuItem>`'s label attribute, the `<Parameter>` element's value attribute, and the `<Property>` element's value attribute.

This process is described in *User Guide: QAD User Interfaces*.

- For SP6, SP7, and SP8, you update the menu system to include the process maps using Menu System Maintenance (36.4.4).

You include a process map as a menu item by specifying the process map URN as the execution procedure for the new item. The following URNs are already included:

`urn:pmap:1_SCP_SF`: Supply Chain View

`urn:pmap:1_VIP_SF`: Vertical Industry View

In this release, the URN `urn:pmap:home` is included for the Processes Home map. This map combines vertical industry and supply chain views of the process map system.

Using Menu System Maintenance to setup process maps as menus is described in *User Guide: QAD User Interfaces*.

## Metrics and QAD Reporting Framework Materials (Standard Edition)

The release media includes the directory `/notes`, which contains support materials for metrics and reporting.

- The `/notes/Metrics` directory includes the following sub-directories:

`/notes/Metrics/metrics`. This contains XML files that define metrics.

`/notes/Metrics/se_browse`. This contains browse definitions to support the metrics.

To install the metrics:

- a Copy the folder `/metrics` to the HomeServer configuration storage location.

For example, if the configuration name is `qadui`, you copy `/metrics` to `$TOMCAT/webapps/qadhome/configurations/qadui/storage`.

- b Import each of the browse definition files in the `se_browse` folder using the Browse Maintenance import program.

- The `/notes/report` directory includes support materials for the QAD Reporting Framework. The QAD Reporting Framework is only available by means of a Services engagement with QAD.

## Messaging and Workflow Inbox (Standard Edition)

The Messaging and Workflow Inbox is not available for SP4, SP5, and SP6, but is available for SP7 and SP8.

For SP4, SP5, and SP6, you must disable the Inbox as follows:

- 1 Open the `manifest.qpkg` file in the `TomcatInstallDir/webapps/qadhome/packages/plugins` directory using a text editor.

- 2 Comment out or delete the following line:

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

For SP7 and SP8, you must enable the Inbox by ensuring that the line in the `manifest.qpkg` file listed in Step 2 is uncommented.

## Installing Clients from Multiple Servers (Standard and Enterprise Editions)

The installation process for QAD .NET UI has been enhanced to let you install multiple versions of the client to different locations.

**Note** This update applies to Standard Edition and Enterprise Edition deployments.

The installation shield now prompts you to either install a new instance of the application or maintain or update the existing instance. This option lets you install more than one version of the QAD .NET UI locally, or to redirect the application path of a currently installed version to a different location. By default, the system installs each client version to a different location.

The `setup.html` file, which you use to download the client, has been updated to enable this flexibility. The file is located at `http://TomcatHost:TomcatPort/qadhome/client/setup.html`.

The following variables have been added to the file to control the installation process:

`ShortcutName...Vers`

This variable displays the installation name and version, which is also displayed in the Properties of the application desktop icon. You can modify this variable to point the desktop icon to a different application version.

`AllowPath`

When set to true, this variable enables a screen prompt that lets you modify the installation path. When set to false, the system installs to the default path.

`AllowShortcutName...Vers`

When set to true, the user can specify a different application shortcut name. If the name already exists, the system prompts you to provide a unique name.

`TargetDir`

Use this variable to hard-code the target location of the installation.

**Note** You must enter two slashes in this path location; for example, `c:\program files\qad`. If you are defining a unicode path, the initial path takes four slashes, for example, `\\\\server\path`.

If the target directory is already in use, the system prompts you for an alternative location if `Allowpath` is set to true. Otherwise, the installation fails.

`StartInDir = TargetDir`

Use this variable to define the Start In directory of the shortcuts. You must also use two slashes in this path location.

`CommandLineOptions = ""`

Add values to this variable to place command line options on the shortcuts. Command line options can include default username, log, and default configuration name.

## Application Changes for QAD .NET UI 2.8

This section covers application changes for all 2.8 deployments.

### QAD Assist

QAD Assist provides online help for the QAD .NET UI and for QAD Enterprise Applications, and is installed for Enterprise Edition as part of the QDT installation process. This feature replaces the previous QAD .NET UI and application online Help files, and is a searchable HTML interface that is displayed by pressing the F1 key. The panel can also be accessed by selecting the option in the Help menu.

Character UI users can still access the online help available for fields and procedures.

You can use QAD Assist to search across user guides, program help, field help, and process maps included with your installation. You can display results for the search entry in any of these formats or in all of them.

**Note** For QAD eB2.1 SP4 through SP8, the search capability is limited to *User Guide: QAD User Interfaces* and to procedure and field help label content.

### Single Terms and Phrases

You can search for single terms (such as 'test'), phrases (such as 'test system') or complex terms using operators (such as 'test AND system'). The panel stores default fields, which you define during deployment, which do not need to be specified when searching. The following operators are supported by the panel:

AND, +, OR, NOT, -

**Note** You can also use the symbol ! instead of the NOT operator.

Operators must be typed in all capitals.

The panel also supports the use of wild cards. Use '?' to replace a single character (for example, 'te?t') and '\*' to replace multiple characters.

**Note** You cannot use these wild cards as the first character in a search term.

The tilde symbol '~' lets you perform fuzzy searches, which return results similar to the term you entered. You can specify the similarity to the searched term using a numerical option between 0 and 1 (for example, 'test~0.8'). The closer the value to 1, the greater the similarity. The default value is 0.5.

You can also use numerals to specify words within a specified distance from each other. For example, if you enter 'test system~10', the panel returns all instances of 'test' and 'system' appearing within 10 words of each other in a document.

The boost symbol '^' allows you to specify the relevance between two terms in a search. For example, if you enter:

test^4 system

the panel applies four times more relevance to documents containing 'test' than to those containing 'system', although it returns results for both. The boost symbol can also be applied to groups of terms (for example, 'test system^4 application deployment').

### Recording Program Actions

The Actions|Export File function is a test utility in the QAD .NET UI and is available in the Action menu for all programs. This function lets you record your actions as you complete an application process and save the recorded actions to an .XML or .XLS file that you store locally. You then execute the saved .XML or .XLS file using Administration|Execute Document Import to reproduce the recorded process on screen. Saved files can be exported for testing to another QAD .NET UI environment, or imported into the current environment.

For example, if an error is occurring in the Purchase Order Maintenance flow, select Actions|Export File before creating a purchase order. As you process the purchase order, the system records each mouse and keyboard action you take, and also the values you select in each stage of the process. The saved file lists each program, field, and value selected.

Execute Document Import lets you replay the process, loop the recorded file, and step through or pause each action or selection in the process.

A `.log` file that reports the results of the actions is created when the recording is run. This file has the same prefix as the recording file but is appended with `.log`.

## New Delete History Option

You can now delete QAD .NET UI temporary files, session information, user preferences, and log file data by choosing Tools|Delete History.

## Configurable Screens Enhancements

### New Workflow and Layout

The Configurable Screens function has been improved with a new screen layout and new workflow. The Properties and Add Fields tabs have been removed from the Configure screen, and replaced with Available Fields, Selected Fields, and Field Properties areas on the main screen. A new Edit screen lets you modify field properties, including the field validation method, and the Tab Order option lets you set the tabbing order for fields on the screen. You can now also move existing standard fields around the current screen.

**Note** The Configurable Screens feature is not available for component-based functions. Component-based program screens are customized using the component-based Design Mode.

### All Program Screens Now Configurable

You can now configure all non-component based program screens using the Configurable Screens function.

### Adding New Fields

When you design a program, the user fields available to add to the screen are displayed in the Available Fields area. You can add these to existing frames, or create a new frame to contain one or more of these fields.

By default, only specific tables and fields are displayed for a particular program. These tables and fields are defined in the `configscreens.xml` file, which is located in the `com/qad/mfgpro` and `com/mfgpro` folders. There are two copies of `configscreens.xml`, in the `com/qad/mfgpro` and `com/mfgpro` folders. You must modify both files to enable your additional field changes.

The `<tableaccess>` section of this file lists the tables associated with each program that are available for Design mode.

By default, only fields that follow the naming conventions below appear in the Available Fields list during Design:

- \*\_\_chr
- \*\_\_dte
- \*\_\_log
- \*\_\_dec
- \*\_user1
- \*\_user2

If you want to display additional fields, you can specify them in the `<userfields>` section of this file.

You can see in the example below that this has been done with `pt_desc1` and `pt_desc2`.

**Warning** The default fields that follow the naming conventions above are safe to add to screens because they are specifically reserved for customizations. However, when adding other fields to the <userfields> section of configscreens.xml, you should be very familiar with the fields and the side effects that can be caused by adding them to the screen. Some fields are heavily validated and verified by the standard code. If they are added to the screen using this mechanism, this validation and verification will be bypassed—causing data corruption.

In the example, the <tableaccess> section of the configscreens.xml file lists the tables for woworl01.p and woworl.p. The default value of each program displays the default table that appears first in the Available Fields area of the Design window.

```
<configscreens>
  <tableaccess>
    <program name="woworl01.p" default="wo_mstr">
      <table name="wo_mstr"/>
      <table name="pt_mstr"/>
    </program>
    <program name="woworl.p" default="wo_mstr">
      <table name="wo_mstr"/>
      <table name="pt_mstr"/>
    </program>
  ...
</tableaccess>
<userfields>
  <table name="pt_mstr">
    <field name="pt_desc1"/>
    <field name="pt_desc2"/>
  </table>
</userfields>
</configscreens>
```

You can now add table sections to this list. The tables and fields you specify here are then displayed in the Available Fields area.

### Default Values on Fields

The Default Value field in the Field Properties area of the Design screen lets you display a default value for the selected field. The Default Value option for fields is available in the following programs:

adcsmt.p	iclotr03.p	pppsmt01.p	renplf.p	sfoptr02.p	wobkfl.p
advnmt.p	icrsrc.p	ppptmt.p	rescrap.p	sfoptr03.p	woopmt.p
aprvtm.p	icsorc.p	ppptmt04.p	reset.p	sfoptr04.p	wowois.p
apvomt.p	icunis.p	rcpsmt.p	rewadj.p	sfoptr05.p	wowoisrc.p
bmpsmt.p	icunrc.p	rcsomt.p	rework.p	sfoptr06.p	wowomt.p
dsdopk01.p	icunrc01.p	rcssmt.p	rqrqmt.p	sfscrap.p	woworc.p
fscamt.p	kbcdrp01.p	rebkfl.p	rspomt.p	soivmt.p	woworl.p
fsrmamt.p	kbcdrp03.p	redt.p	rwopmmt.p	sosomt.p	woworl01.p
icccaj.p	poblmt.p	reject.p	rwromt.p	sosopk.p	
iclomt.p	popomt.p	relbr.p	rwromt01.p	sososl.p	
iclotr02.p	poporc.p	remove.p	sfoptr01.p	sqqomt.p	

### Configurable Screens Report

The Configurable Screens Report (36.20.10.17)—available in patch ECO: Q1WY—lists all screens that have been configured. The report details the fields that have been modified or added, and you can generate a report on individual configured screens or on all screens. This patch is required for all service packs.

## Browse Maintenance Enhancements and Issues

### Field Properties Enhancement

The Data Type drop-down menu in the Field Properties screen of Browse Maintenance now displays all the valid Progress 4GL datatypes. You can select a datatype for the field from the following: character, data, decimal, integer, logical, recid.

### Browse Definition Migration Utility

You can now export browses, import browses, and delete multiple browses from the Actions menu in Browse Maintenance (QAD .NET User Interface mode). Browses are stored in an XML-based file format with the .brwx file extension.

**Note** Access to these functions should be restricted to authorized users. See “Restricting the Export, Import, and Deletion of Browses” on page 55.

### Exporting a Browse

To export a browse:

- 1 Open Browse Maintenance.
- 2 Choose Actions|Export (shortcut: Ctrl+E).  
An Export menu displays, listing the browses and their associated data.
- 3 Use the Output File field to specify the location and filename of the browse data you want to export.  
By default, the location is C:\Documents and Settings\username\Application Data\QAD\Shell\version\qad.plugin.services\BrowseMaintenance, and the filename is your user ID followed by a numerical string and then the .brwx extension.
- 4 From the Available area, select a browse by clicking it.
- 5 Click the right angle bracket (>) button to move the browse to the Selected area.  
Note that you can select multiple browses by using the Ctrl key and can place all the browses in the Selected area using the double angle bracket (>>) button.  
Exporting includes the browse and view data for the browse, but you can specify whether to include associated browse data in the Associated Data area, which includes check boxes for including the Drill Master, Field Help, Program Information, Label Detail, Procedures, Source Detail Data, and URL Data. Finally, click the Export button.

### Importing a Browse

To import a browse:

- 1 Open Browse Maintenance and choose Actions|Import (shortcut: Ctrl+I). An Import menu displays.  
Use the Input File field to specify the location and filename of the browse data you want to import.  
The browses you have selected are listed in the Available area.
- 2 From the Available area, select a browse by clicking on it and then click the right angle bracket (>) button to move the browse to the Selected area.  
Note that you can select multiple browses by using the Ctrl key and can place all the browses in the Selected area using the double angle bracket (>>) button. Importing includes the browse and view data for the browse, but you can specify whether to include associated browse data in the Associated Data

area, which includes check boxes for including the Drill Master, Field Help, Program Information, Label Detail, Procedures, Source Detail Data, and URL Data.

If you are importing a browse that has the same name as an existing browse, specify whether you want the system to replace the existing browse with the one you are importing by choosing the Overwrite Existing check box in the Options area.

- 3 Click the Import button.

### Deleting a Browse

To delete one or more browses:

- 1 Open Browse Maintenance.
- 2 Choose Actions|Delete Multiple Browses (shortcut: Shift+Delete).

A Delete menu is displayed, listing the browses and their associated data.

- 3 From the Available area, select a browse by clicking on it and then click the right angle bracket (>) button to move the browse to the Selected area.

Note that you can select multiple browses by using the Ctrl key and can place all the browses in the Selected area using the double angle bracket (>>) button.

- 4 Click the Delete button.

Deleting removes the browse and view data along with the associated data.

### Restricting the Export, Import, and Deletion of Browses

The ability to export, import, and delete browses is disabled by default and should be limited to authorized users.

The `client-session.xml` file (located in `TomcatInstallDir/webapps/qadhome/configurations/SysEnv/`) now includes a setting for authorizing access to the import, export, and delete features.

A new `<DotNetBrowseMaintenanceUtilities>` element includes a `<Utility>` element whose attributes specify authorization. The format is as follows:

```
<DotNetBrowseMaintenanceUtilities>
    <Utility name=name enabled=boolean authorization=users></Utility>
</DotNetBrowseMaintenanceUtilities>
```

Where *name* can be "Import", "Export", or "MultipleDelete", *enabled* can be "true" or "false", and *users* can be "\*" for all users, a list of user IDs, or a role (Enterprise Edition).

### Configured Fields and Browse Maintenance

When you add fields to a screen using Configurable Screens, the added fields are now available for use in Browse Maintenance.

### Maintenance Screen Enhancements

- You can now show/hide tabs in the Query area (the lower half of the form) so that by default you only see the Query Grid and Header Data. Right-click to display the Local Variables, Pre-processor Commands, Post-processor Commands, and History tabs. The Query and Header Data tabs are necessary for maintenance and therefore cannot be hidden.

- An Insert Calculated Field function is now available by right clicking a column in the Query Grid and selecting the context menu item. You no longer have to remember the proper naming for creating calculated fields (local-varXX).
- You can now add a conversion function to the From and/or To fields for a table relationship join. The fields that you join must be of the same data types, and the system displays a warning when fields of different data types are selected.

The Join Properties screen lets you set the conversion function to be used for the join.

The following fields have been added to the Join Properties screen:

#### Conversion (Left Field)

This combo box contains a list of the available conversion functions that can be used to convert the left field datatype.

#### Conversion (Right Field)

This combo box contains a list of the available conversion functions that can be used to convert the right field datatype.

Select to convert either the left or right field datatype to ensure the datatypes match. At any time you can display the Join Properties dialog by right-clicking the line indicating the join between the two fields and selecting Join Properties from the context menu. You can then modify the conversion.

- You can now also select the fields to be displayed in the field list for a table. Your selections are stored on the home server and remembered when the Browse definition is subsequently loaded.  
To filter the list of fields, right-click on the table and choose Select Fields from the Context menu. The Select Fields screen lets you select the fields to be displayed in the Table Control field list.
- New Insert and Delete right-click options on the Query grid in Browse Maintenance let you add blank columns to the grid, in which you can specify additional fields for the browse. The right-click Show option on the query grid, which you use to display or hide tabs, has been renamed Include.

## Excluding Tables

System administrators can now exclude tables for use in Browse Maintenance by designating the tables and restricted users or roles in the `client-session.xml` file. The Browse Maintenance function reads this .XML file before populating the Select Tables screen.

## Roles and Browse Maintenance Utilities

Roles in Enterprise Edition are the equivalent of user groups in Standard Edition. You use the same User IDs/Groups field to define access to browse functions in both applications.

If your role or user group has not been specified in the UserID/Groups field on the Header Data tab of Browse Maintenance, you can run the browse but cannot open the browse in Browse Maintenance. You can also now specify roles or user groups in the authorized user list for the Browse Maintenance Import, Export, and Multiple Delete functions. Previously, you could only specify individual users.

## Browse Maintenance Index Limits

Progress has a limit to the size of the data that can be stored in an index. In versions prior to 10.1B, the limit is around 200 characters (the sum of all the data contained in the fields of an index of a record). This limit has been increased to around 2000 characters in version 10.1B and beyond. Within Browse Link functionality, you are restricted to the 200-character limit unless you have upgraded your version of Progress. This limits the number of parameters that can be defined in a browse link, usually to four or less, although a fifth parameter is possible if the names of all of the involved fields are small.

## Browse Collection Maintenance State Management

Browse Collection Maintenance now runs the browses without any simplification of logic, so you can add state data (for example, charts or summaries) to the browse. When you then drill-down by right-clicking on the browse running inside this maintenance program, the system saves that state with the collection. This also means that you can create child drill-downs in the running browse instance in this screen, rather than having to use the Collection Maintenance UI to add a child program. This also means that you can now deploy browses with state to the menu using Collection Maintenance.

## Browse Enhancements

### Browse Data Variable Enhancement

When configuring a browse, you can now enter date variables when searching using a date filter. For example, when browsing for sales order bills by due date, you can now select from a drop-down list of date variables such as Today, Tomorrow, Current Quarter, Last Year, Next Week, and Last 7 Days. The Search Variable Tip button toggles this option.

### Quick Search on Browses

A new search filter on browses lets you search for a value across all of the fields in the browse. This feature is available for non-component based browses only.

Use the \*Search For option from the Search pull-down list to retrieve all the results that contain the search value in any of the columns. This option is useful as a quick search, and also when you have details for a record that cannot be searched using any of the existing filters. For example, if you are browsing customer records and use Search For to retrieve the value 1234, the results display all records for which 1234 is found in any of the record columns (for example, customer code, postal code, or site code). You can use the Contains, Starts With, or Equals operators with the Search For filter.

**Note** The Search For option is not available for the following browses in this release:

- Supplier/Item
- Program Information
- Sales Accounts
- Contract Detail
- Call Quote Detail View
- Tax Class
- Tax Environment
- Tax Type
- Tax Usage
- Tax Zones
- Supplier
- Inventory Detail by SLG

These browses contain outer table joins, and do not retrieve correct search results for the Search For option.

You can also create groups of browses for quick search purposes. Create a new browse group by right-clicking on the panel and selecting New to create a new browse folder.

You can add individual browses or browse collections by selecting the folder and dragging and dropping browses from the Applications panel.

Enter a search term in the Quick Search field and press Enter to search the browses contained in the folder for the term.

This option searches integers and text strings only and does not retrieve dates.

### Operational Metrics

The Browse Metrics option lets you create a visible metric from browse data. For example, by creating a metric group from a Customer browse, you can view what percentage of your total customers are based in the US or France.

The browse program (in this example, Customer Browse) is the basis for the metric and provides the total against which percentages are calculated. You add information types as additional metrics as necessary.

You can create a separate metric for US customers and French customers, by adding two separate browse metrics based on the country code contained in the customer address. The additional metrics are added to the metric group, which then displays the numbers for each customer type as a percentage of the total for all customers.

You can also add operational metrics as new nodes in process maps. See “Process Map Enhancements” on page 59.

### Product Structure Maintenance Enhancements

Product Structure Maintenance has been enhanced with the addition of Show and Hide functions for columns. These options let you quickly reorganize the screen display for ease of editing.

Show All Columns, Show Default Columns, Hide Columns, and Reset Default Column Order are available as right-click options on the column headers of the structure workspace. These options let you hide data that is not immediately relevant for product structure maintenance.

The new Add Effective Date and Maximum Levels To Retrieve fields limit the number of records returned from a product structure browse and improve performance.

When you specify an Effective Date, the browse engine returns only those records that are valid for that date. (The effective date occurs between the component’s start and end dates.) You can only use the Effective Date filter when the Product Workbench is in New mode.

The Maximum Levels option sets the number of levels to be retrieved for the root Product Structure. The maximum value is 25 to limit the impact and usability of structures larger than 25. A blank value (the default) returns all levels. You can only use the Maximum Levels filter when the Product Workbench is in New mode.

### Product Structure Maintenance Usability Enhancement

The Product Structure Maintenance screen has been reorganized for ease of use. The Item and Product Structure codes grid is now positioned in the upper part of the screen, and the BOM tree is moved to the lower part.

## Process Map Enhancements

### Process Maps in Silverlight

In this release, the QAD .NET UI now renders process maps using Microsoft's Silverlight technology as the default instead of SVG-based technology. With Silverlight, the process maps can have a sharper display with a greater range of graphical options. You set the default display technology in the Process Admin Context Parameters.

### Editor Enhancements

The Process Editor has been improved with a number of enhancements:

- The system displays a confirmation prompt when you save changes to a process map.
- You can use the Disabled style to disable a node in a process map without deleting it.
- The Dash Width attribute for node borders and connectors lets you convert a solid border or line to dashed.

### Migrating Process Maps

Process map `.xml` files for QAD .NET UI releases are stored in the `TomcatInstallDir/webapps/qadhome/configurations/default/storage` directory. When migrating to a new QAD .NET UI release, you must manually copy the map files to the `configurations/default/storage` directory of the new web applications server.

See also “Storage Directory Content Location” on page 70.

### Refresh Enhancement

The Administration|Process Admin menu has been enhanced with a Refresh button. When you modify a Process Map context parameter, click Save to save the change, and then Refresh to update the process map function configuration. The screen now displays a refresh status, and indicates when the refresh is complete.

### Adding Operational Metrics to Process Maps

The Operational Metrics option lets you create a visible metric from browse data. You can now import operational metrics into process maps as node images.

Saved metrics are stored in the `{QAD_HOMESERVER}configurations/<environment_name>/storage/metrics_images/` directory and can be imported into a process map as a `.PNG` file.

To access these files, you first identify their storage folder as a Process Properties variable in Administration|Process Admin, and then identify the name of the metric graphic file as a process map node image. Use the following steps to import metrics as map images:

- 1 Set the metrics storage folder in the `QAD_METRICS_IMAGE` variable on the Process Properties screen.

The Metric Groups variable has the syntax

`{QAD_HOMESERVER}configurations/<environment_name>/storage/metrics_images/`, where `<environment_name>` is the name of the environment to which you log in.

- 2 Click Apply to apply the change, and Refresh to refresh the configuration.

- 3 In the Metrics folder of the Applications area, select the metric you want to import into the process map.
- 4 Right-click the metric name to view its properties.

**Note** The identifying keys for metrics are typically long random strings; for example, `metrics/0e52091e-5820-46e8-a06c-c8b3bc91a152.xml`. The key is the string itself, and does not include the `/metrics` folder reference.

- 5 Run Process Editor, and open an existing process map or create a new one.
- 6 Select a Node Cell.
- 7 In the Node Properties, Image field, enter the identifying key for the metric.  
You must include the metric variable prefix, and must also change the identifying key extension from `.xml` to `.png`.

For example, to include a metric with the key `metrics/0e52091e-5820-46e8-a06c-c8b3bc91a152.xml`, enter:

```
{QAD_METRICS_IMAGES} 0e52091e-5820-46e8-a06c-c8b3bc91a152.png
```

The metric image is now displayed in the process map cell.

### Fixed Asset Maintenance Issue

Previously, you could only add an attachment to enabled fields in Fixed Asset Maintenance (32.2), and the attachment was not tracked as the asset was updated. In this release, you can now add attachments to any field in Fixed Asset Maintenance, and the attachment is tracked throughout the update process.

### Domain/Workspaces Configuration

With the introduction of Enterprise Financials, workspaces are partitioned by domain and entity. This has a dramatic impact on the number of workspaces, the amount of memory used, usability and migration. For this reason, you can now configure the behavior of workspaces in your system.

Two new configuration settings have been added to the `client-session.xml` file:

- `<Workspace.Provider>`

This setting controls the type of plug-in used to display workspaces. It has two options:

- `QAD.Plugin.Services.DomainWorkspaceProvider`  
This option displays one workspace per domain.
- `QAD.Plugin.Services.DomainEntityWorkspaceProvider`  
This option displays one workspace per domain and entity.

- `<Workspace.Format>`

This setting lets you customize the workspace display name. The following variables have been defined to allow flexible naming.

- `db-name`
- `domain-name`
- `domain-id`
- `currency`
- `entity-name`

- entity-id
- culture-name

### **Example**

```
QAD.Plugin.Services.DomainWorkspaceProvider = ${domain-name}
QAD.Plugin.Services.DomainEntityWorkspaceProvider = ${domain-id} ${domain-name} [${currency}]
${entity-id} > ${entity-name}
-->
<Workspace.Format>${domain-id} ${domain-name} [${currency}] > ${entity-id} ${entity-
name}</Workspace.Format>
```

## **Generalized Code Fields**

If a field is designated to have Generalized Codes validation, a drop-down menu of selectable generalized codes is displayed beside the field. To check that a field is validated by generalized codes, place the cursor in the field and enter CTRL+F (in non-component based programs only). If a field with generalized codes validation does not have any codes defined in Generalized Codes Maintenance, a lookup icon is displayed next to the field rather than a pull-down icon. If you add codes in Generalized Codes Maintenance, you must log out and in to the application to view the change to the field. The lookup icon changes to a pull-down icon and the new codes are available. The refresh also takes place when you change domains.

## **Work Order Receipt Backflush Issue**

When backflushing components in Work Order Receipt Backflush, if you use the keyboard arrow keys to scroll through the list, and select a component by pressing ENTER, the wrong component is selected. You must select components in the components list by clicking the component with the mouse or pressing the spacebar.

## **Document Attachment Issue**

In the current release, it is possible to define key fields in the document attachment definition that do not exist in the target program to be defined. If the target program is executed, an attachment area is enabled and attachments can be created. These attachments are not correctly referenced (they are stored in the file hierarchy above the domain level) and are not displayed unless additional attachments are created for the same invalid key field. You therefore must define a valid field (one that is visible in the current frame) when creating an attachment definition.

## **Self-Bill Maintenance Issue**

When you use the down arrow in Self-Bill Maintenance to select a record, press Enter to load the record, and press Enter a further three times to navigate through the screen, the system displays a frame with a blank line. To continue, press the Insert key on the keyboard or choose Actions|Insert. This action is equivalent to pressing F3 in the Character UI or in Terminal mode.

## **Connection Manager Enhancement**

The Connection Timeout field in Connection Manager sets the number of milliseconds an HTML session can remain inactive before Connection Manager closes it. This number has been increased from 1800000 (30 minutes) to 3600000 (60 minutes).

### **Closing Active Report Tab**

You use the CTRL+F4 keyboard shortcut to close an active tab in a QAD .NET UI screen. However, this shortcut does not apply to active reports that are set to output to Page. You must click the close button (X) on the screen tab to close these screens.

### **Printing Metrics from Print Preview**

When using QAD .NET UI 2.8 with eB2.1 SP4, SP5, or SP6, if you choose Print from the Print Preview screen of an operational metric, the metric is printed but then continuously sends blank pages to the printer. Close the Print dialog to stop the printing of the blank pages.

### **Saving Configurable Screens for All Users**

When you create a design template for all users (by selecting All Users on in the Configurable Screens Setup window), the changes you make are saved and applied to the screen. However, when you exit Design Mode, right-click the program again and choose Design, the All Users checkbox is de-selected.

To resolve this issue, select the All Users field for the template and click to close the Configurable Screens Setup window. When the system prompts you to Save changes before closing, click Yes. This ensures that the status of All Users is correctly displayed when you next open the Configurable Screens Setup window. This issue applies to Standard Edition deployments only.

# QAD .NET UI 2.7.3 Release Notes

## Installation and Configuration Changes

### Process Map Changes for Multiple Language Support

Previously, process maps for each supported language were stored in the *QADDesktopBase/webapps/WEB-INF/pronav/xml/language* directory, where each language subdirectory contains process maps translated into the supported languages. For example, the directory where process maps in English were stored is the *QADDesktopBase/webapps/WEB-INF/pronav/xml/en* directory.

Starting with this release, instead of having process maps in language subdirectories for each supported language, process maps look up the appropriate label text to display for the user's current language when the QAD .NET UI displays the process map. The system identifies the label text to display based on a label key and the user's language. In the *QADDesktopBase/webapps/WEB-INF/pronav/properties* directory, a *properties\_language.xml* file contains the label text for each supported language. For example, the file for the label text in English is *properties\_en.xml*.

Maintaining the label text for the supported languages in these properties files makes it easier for QAD .NET UI administrative users to modify the label text of process maps for the language that they must support.

### QAD Business Intelligence Integration and QAD BI Dashboards

When integrated with QAD Business Intelligence (BI), the QAD .NET UI can support business intelligence dashboards that can display key data for managers. The QAD BI Dashboards include the following:

- Sales Manager Dashboard
- Purchase Manager Dashboard
- Warehouse Manager Dashboard

QAD BI provides a complete business intelligence solution for analyzing data residing in QAD Enterprise Applications and other data sources. It extracts and transforms data from one or many data sources using flexible rules and stores this information in a data warehouse. Prebuilt models support powerful analysis against the data warehouse using Cognos 8. For more information on QAD BI, contact your QAD representative.

### QAD Production Scheduler Menu Collections

You can now access QAD Production Scheduler (QPS) through two new menu collections:

- Repetitive Scheduling
- Work Order Scheduling

You can continue to access other versions of QAD Production Scheduler using the existing Internet URL link. If you do not have QAD Production Scheduler installed, the system displays an error message when you select the tab for it.

Once you install QAD Production Scheduler, you should update the menu extension configuration file (*plugin-menu.xml*) file to remove the error message. To do this, use the following procedure:

1 Open the `plugin-menu.xml` file in the directory:  
`TomcatInstallDir/webapps/qadhome/configurations/SysEnvName/menus/plugin-menu.xml`, where `SysEnvName` is the system environment name that you select when you log in to the QAD .NET UI.

2 In the file, locate the code for the Add On folder.

3 Locate the line that points to a `QPSUnavailable.html` page:

```
<ShellMenu key="addon" menuType="application" label="{AddOn}">
  <ShellMenuItem key="qps2" label="{QPS2}" image="Maint">
    <Command type="QAD.Commands.WebBrowserCommand">
      <!-- Parameter value="http://server:port/path/qps.html?sid={sessionid}" type=
"System.Uri,System"/> -->
      <Parameter value="{HomeServer}/status/QPSUnavailable.html" type=
"System.Uri,System"/>
    </Command>
  </ShellMenuItem>
</ShellMenu>
```

4 Replace the `<Parameter>` element with an entry about your installed version of QAD Production Scheduler:

```
<Parameter value="http://server:port/path/QPS.html?sid={sessionid}" type=
"System.Uri,System"/>
```

**Note** The `server:port/path` settings are specific to your implementation of the QAD Production Scheduler. For example: `http://server123:80/michigan/plant15/QPS.html?sid={sessionid}`

`QPS.html` is the main QAD Production Scheduler Web page, while the `sessionid` is determined by the system for each login session; therefore, these should not be changed.

## QAD ReportNet Bundle Installation

The QAD ReportNet Bundle 1.1 is required only if you want to implement the advanced reporting and dashboard functionality to create custom reports or QAD-provided dashboards in the QAD .NET User Interface.

When you install QAD BI, you must install the QAD ReportNet Bundle 1.1, which is included on the QAD .NET UI CD. Before installing the QAD ReportNet Bundle, you must first install Cognos 8.2 or 8.3.

Perform the following steps to install QAD ReportNet Bundle on the Cognos report server:

- 1 If the Cognos 8 service is running, launch Cognos Configuration and choose Action|Stop to stop the Cognos 8 service.
- 2 On the QAD .NET UI CD, unzip the `QADReportNetBundle_1_1.zip` file to a directory (for instance, to `/QADReportNetBundle_1_1`).
- 3 From the `/QADReportNetBundle_1_1` directory, launch `install.exe`; to install QAD ReportNet Bundle on UNIX, launch `install.sh`.
- 4 An introduction screen is displayed. Choose Next to continue.
- 5 The Cognos Server Configuration screen is displayed. Enter or view the following information:  
*Cognos Installation Directory*. Enter the directory where Cognos is installed.  
*Cognos Dispatcher URL*. Use the default dispatcher URL value.

*Cognos Version.* Indicates the version of Cognos installed.

*Operating System.* Indicates the server operating system.

Choose Next to continue.

- 6 The installation program checks the status of the Cognos 8 service. If the service is running, you will be prompted to stop it first before proceeding.
- 7 On the QAD Admin Database Configuration screen, enter the correct information to connect to the QAD administration database:
  - Host.* Enter the QAD database server name.
  - Port.* Enter the TCP/IP port on which the QAD administration database is listening for connections.
  - Database.* Enter the logical name of the QAD administration database.
  - User and Password.* Enter the correct user/password combination for connecting to the QAD administration database. Contact your system administrator for this information.Choose Next to continue.
- 8 On the Home Service Configuration screen, enter the correct information relating to the QAD .NET UI implementation:
  - Service URL.* Enter the URL pointing to the QAD .NET UI home server (the Tomcat instance where it is running).
  - Environment Name.* Specify a system environment as defined on the QAD .NET UI home server (defined by a system administrator in the `../configurations/SysEnv` directory).
  - Environment Name Key.* Leave this field blank. The field is currently not used.Choose Next to continue.
- 9 An installation summary screen is displayed. If all information is correct, click Install to proceed with the installation.
- 10 When installation is complete, exit the installation program.
- 11 Start the Cognos 8 service.

## Application Changes

### Process Map Updates

- Multiple Language Support for Process Maps

In previous releases of the QAD .NET UI, node labels were simply text strings displayed on the node. To create versions of the process map in multiple languages, you had to maintain a version of the process map for each language.

In this release, each label has a identifier key and associated text that can be displayed on a node. You can use Process Label Maintenance to create and maintain the label keys and text. Additionally, the Process Editor includes some changes in the Label field to support the use of label keys.

You can now either just enter text in the Label field in your language as before or you can define a label key and its associated text and assign the label key to the node from the Label field.

This option lets you reuse existing label keys on multiple nodes and have the associated text translated once for each language.

- Process Editor Changes

When creating or editing nodes in the Process Editor, the Label field on the Node Properties panel gives you the ability to select the label keys as well as enter text. Because you can define the text for the label keys in all the available languages using Process Label Maintenance, you now have a powerful way to define reusable label text for all of the supported languages.

- Process Map Node Enhancements

The Process Editor includes two new shapes available from the Shape pull-down in the Node Properties menu: Document and Automated Process. The Node Properties menu now also includes two new buttons, Add More Links and Cell Borders. With Add More Links, you can define up to eight links on a given node. With Cell Borders, you can specify the color, width, and dash width of the top, bottom, left, and right borders of the cell in which the node is located.

- Process Editor Add Links Enhancement

The Process Editor's Node Properties panel now includes an Add More Links button next to the Target field. You can add up to eight URLs as links on a process map node. After clicking Add More Links, for each link, in the Label field enter text for the label text of the link and in the Link field enter the URL.

## Auto Start Issue

Previously, menu items set to start automatically with the Auto Start feature would launch twice rather than once. This problem has been fixed in this release.

## Configurable Screens Updates

- New Field Label Display Issue

Previously, when setting up a configurable screen, after you placed a field with a new field label on the screen, the label did not display in certain situations. This problem has been resolved in this release.

- Configurable Screens Hidden Field Issue

With the Configurable Screens feature, a field can be set as hidden so that the field does not display to the user. In the previous release there was an issue in which hidden date fields were not visible even in design mode, which prevented the date field from being made visible again. This issue has been resolved with ECO Q1PZ.

- Enabling Browsers to Include New Fields on Configurable Screens

The Configurable Screens feature allows new fields to be added to program screens. New fields can be existing fields in a table (user fields such as `so_chr01`, for example) or entirely new fields that do not already exist in a table. Fields that already exist in a table can be added to a browse using Browse Maintenance in the standard way.

## Browse Updates

- Search Shortcut Improvement

When using a browse, entering Ctrl+S is a shortcut for placing the cursor focus on the first field in the Search panel. Previously, entering Ctrl+S placed the focus within the Search panel but not on the first Search field. This issue has now been fixed so that the focus is placed on the first field in the Search panel.

- Browse Search Comma-Separated Values

Browse search condition values can now be a list of comma-separated values where each comma indicates a logical *or* operator in the search query. This feature is only available for search conditions with the Equals operator and fields with the String data type. If you want to include the comma

character as part of the search value and not have it treated as a logical *or* operator, enter a backslash (\) in front of the comma. For example, a , b would specify a or b, but a \ , b would specify the string a , b.

- Financials Browse Icon Issue

On Financials browses, an extra icon was displayed next to the Related Views divider on the drill-down menu. This issue has been fixed in this release.

- Browse Maintenance Column Limit

In Browse Maintenance, the number of columns in a browse definition cannot exceed 50. The error message has been clarified so that it now explains the reason for the error is that there are more than 50 columns in the browse definition.

- Maximum Browse Record Display Issue

The `<MaximumBrowseRecordsToCount>` parameter in the client session configuration file `client-session.xml` specifies the maximum number of records the browser server will count during a query. (The default is 50000.) For example, if `<MaximumBrowseRecordsToCount>` is set to 200 and the browse's records per page setting is 100, the browse would indicate that you are viewing 1 - 100 of >200. Previously, if the value of the parameter was set to zero or less, the system would query for the count and then generate an error when displaying browses. Now, if the parameter is set to zero or less, the system does not query for the count and the browse does not display the count: the browse only indicates that you are viewing 1 - 100, for instance.

- Browse Maintenance PDF and Excel Export

In Browse Maintenance you can run a browse by clicking the Run Browse button. From the window for running browses, you can now export the browse to PDF or Excel by selecting Actions|Export to PDF or Actions|Export to Excel.

## Dynamic Inquiries Display Improvement

The display format of the dynamic (bucketed) inquiries has been improved to prevent the crowded, overlapping views of data that could occur with certain inquiries such as the Master Schedule Summary Inquiry (22.18).

## Progress Data Type Issue

A new Progress data type, `datetime-tz`, is now supported in the Character UI but it is not supported by the QAD .NET UI's Browse Engine. You can create a custom field in a custom table with the data type `datetime-tz` and then create a browse to query this table. However, the `datetime-tz` data will be rendered as a string in the QAD .NET UI because the `datetime-tz` data type is not supported by the Browse Engine.

## Product Structure Updates

- Maintenance Date Format Issue

In Product Structure Maintenance (13.5), date fields (such as Start Date, or End Date) using date formats other than `mm/dd/yy` were causing an error for systems whose language and country code was other than `en-US`. For example, if the system was using `GB` as the country code, the date format is `dd/mm/yyyy`, but an error would occur if you used the `dd/mm/yyyy` format. The error only occurred in the Product Structure Maintenance tab view, not in the hierarchical view. This issue has been fixed in this release.

- Product Structure Maintenance Case-Sensitivity Issue

Previously, Product Structure Maintenance in the QAD .NET UI was not representing parent-component relationships correctly for component records that were inconsistent in their use of upper and lower case characters. This issue has been fixed in this release.

- **Product Structure Maintenance Duplicate Component Issue**

Previously, Product Structure Maintenance in the QAD .NET UI prevented you from saving a product structure where you had two different components in the same structure referencing the same sequence number. This issue has been fixed in this release.

### **Components with Trailing Spaces Display Issue**

Previously, Product Structure Maintenance in the QAD .NET UI was not displaying certain components (Item Number, Parent Item, Component Item, and BOM Code) under their parents if the component values included trailing spaces. This issue has been fixed in this release.

### **Percentage Field Issue**

In the previous release, values entered in fields for percentages were not being stored properly. This issue has been fixed in this release.

### **Application Help Access Issue**

In previous releases, users who did not have access to the Field Help Maintenance (36.4.13) program were unable to access field and program help by pressing the F1 key. This issue was resolved in this release.

## **QAD .NET UI 2.7.2 Release Notes**

The QAD .NET UI 2.7.2 release is only available as a bundled component of the QAD Enterprise Applications–Enterprise Edition 2008.1 release.

The features are described in the release bulletin for QAD 2008.1 Enterprise Edition. The 2.7.2 release is not available for QAD Enterprise Applications–Standard Edition 2008.1. For QAD 2008.1 Standard Edition, use the QAD .NET UI 2.7.3 release.

# QAD .NET UI 2.7.1 Release Notes

## Installation and Configuration Changes

### Storage Directory Content Location

The QAD .NET UI maintains the default storage data for menu collections, browse collections, and attachments in the *TomcatInstallDir/webapps/qadhome/configurations/default/storage* directory. However, during system installation, you must first place the appropriate data for your system in that directory.

If you are using QAD 2008 or 2008.1 Standard Edition, you must copy the data in *TomcatInstallDir/webapps/qadhome/configurations/default/eB21\_storage* to *TomcatInstallDir/webapps/qadhome/configurations/SysEnvName/storage*.

If you are using QAD 2008 or 2008.1 Enterprise Edition, you must copy the data in *TomcatInstallDir/webapps/qadhome/configurations/default/eB3\_storage* to *TomcatInstallDir/webapps/qadhome/configurations/SysEnvName/storage*.

## Application Changes

### Number Format Matching

A number format matching error caused by different usages of the decimal point in different countries generated a "System is unable to process your request" error message. This problem was resolved in this release.

### Inquiry and Browse PDF and Excel Export

The Excel (.xls) and .pdf files exported from inquiries and browses are stored in the %TEMP%\Shell folder. The appropriate application (Excel or Acrobat) then launches and opens the file. If you choose Save As from the program and specify where to put the copy of the file, the program creates a new copy of the file in the folder you specify. Meanwhile, the original file in the %TEMP%\Shell folder remains in that folder and is not deleted. The benefit of not deleting the file is that the file exists as a backup even when not saved in the application. However, the number of original files can gradually build up over time in the %TEMP%\Shell folder unless you move or delete them.

### Browse Sort Order Changes Summary

In the QAD .NET UI 2.7 and 2.7.1, the search sort defaults to the primary field in the browse. To change the sort order after the search, click on the top of the column header for the desired sorting. When you save the browse, the sort order is retained for the next search. Before searching, you can change the sort order by clicking the column header for the desired sort order. The sort order is then retained in the search.

### Support for New Double-byte Codepages in QAD 2008 Standard Edition

QAD 2008 Standard Edition includes support for new double-byte Progress codepages for Simplified Chinese, Traditional Chinese, and Korean.

<b>Language</b>	<b>Previous Codepage</b>	<b>New Codepage</b>
Simplified Chinese	gb2312	cp936
Traditional Chinese	big-5	cp950
Korean	ksC5601	cp949

The new codepages include the character codes in the previous codepages and also include additional characters.

### **Program Session Timeout**

Previously, active program sessions could close unexpectedly because of a QAD .NET UI home server session timeout configuration. This issue was resolved in this release.

# QAD .NET UI 2.7 Release Notes

## Application Changes

### Browse Output to PDF

The Export to PDF option was introduced to let you generate PDF versions of browses.

**Note** To access browse output to Excel, choose Actions|Export to Excel.

### Browse Column Filters

Filters were introduced for browse columns. The filter option is accessible as a filter-shaped icon located at the heading of each column.

### Browse Sort Settings Saved in Favorites Menu

When you save a browse as a favorite, the QAD .NET UI will save any sort column settings. When you launch a saved browse from the Favorites menu, the sort conditions, summaries, charts, and search conditions are applied to the browse results.

### Browse Sort Conditions Preserved After Changes to Search Conditions

When you click on a column header to sort it and then change the search conditions to re-query, the QAD .NET UI does not cancel the column sort conditions.

### Multiple Browse Maintenance Sort Options

In Browse Maintenance, the value of the Sort Order field for each column specifies the order in which the columns are sorted relative to each other, and the Sort field specifies whether a column is sorted in ascending order, descending order, or unspecified order.

### Browse Engine Table Limit Increased

In this release, the QAD .NET UI browse engine can process browses with up to 30 tables. However, the Character UI cannot process browses with more than four tables. ECO Q1FD prevents the Character UI Browse Maintenance (and browse engine) from accessing the enhanced browse definitions defined in the QAD .NET UI that the Character UI cannot run.

### Comma-Separated List of Values in Browse Search Value Field

You can enter a comma-separated list of values in the search field for browses. When the search conditions include the equals operator and the search is against values of the string data type, the search query will perform a logical OR on the results.

### Automatic Refresh for Browses

Displayed browses are automatically refreshed at a specified rate, using Refresh|Start. Refresh|Rate lets you set the number of seconds for the refresh. The default value is 30 seconds, and is set using the `client-session.xml` file's `<DefaultRefreshRate>` parameter.

## Dynamic Inquiries

Selected inquiries display in a dynamic, hierarchical (bucketed) format that makes them more convenient to use. With these inquiries, all the fields for the inquiry are displayed along the top of the screen. You can enter values, run the inquiry, and then enter new values to get an updated inquiry. The results can be exported to PDF or Excel. The inquiries that feature this display include the following:

- Master Schedule Summary Inquiry (msmsiq.p, 22.18)
- MRP Summary Inquiry (mrmpiq.p, 23.13)
- DRP Summary Inquiry (drmpiq.p, 12.13.13)
- Work Center Load Inquiry (crwciq01.p, 24.13)
- Department Load Summary Inquiry (crdpiq01.p, 24.19)
- Shipping Load Summary Inquiry (dntmiq01.p, 12.5.17)
- Item Resource Load Summary Inquiry (rprsiq01.p, 21.21)
- Item Resource Load Detail Inquiry (rprsiq02.p, 21.23)
- PL Resource Load Summary Inquiry (rprsiq03.p, 21.9)
- PL Resource Load Detail Inquiry (rprsiq04.p, 21.11)

The dynamic inquiries include the following keyboard shortcuts:

- To run an inquiry, enter Ctrl+R
- To export an inquiry to Excel, enter Ctrl+E
- To view an inquiry as a PDF, enter Ctrl+Shift+P

## Report Output to Text Printer

You can configure a text printer for "page" printer output. The text printer renders a non-formatted report that can be saved locally a text file or PDF file, or can be printed on a standard printer. To set up report output to a text printer, use Printer Setup Maintenance (36.13.2), setting the Initialize Ctrl field to text.

## Attachments

You can include attachments to selected programs and maintain the attachments using the new Attachment Maintenance program.

## Messaging and Workflow

A new messaging facility lets you send messages and workflow information to other system users of the system. When using programs, browses, inquiries, and process maps, you have an Inbox on the left side of the application area for sending and receiving messages. You can also send workflow messages, which include links to programs or browses, by choosing Actions |Workflow when using a program or browse.

## Configurable Screens

The Simplified Screens feature available in previous releases was enhanced and expanded in this release, and renamed Configurable Screens. If you are using the QAD .NET UI with QAD 2008 Enterprise, you can add a user-defined field (UDF) to a table and then add the new field to the current screen. For QAD 2008 Standard, you can add existing fields from tables.

## New Configurable Programs

In this release, the following programs were added to the list of programs you can configure:

- Work Order Maintenance (16.1)
- Product Structure Maintenance (13.5)
- Supplier Scheduled Order Maintenance (5.5.1.13)
- Customer Plan Schedule Maintenance (7.5.1)
- Customer Ship Schedule Maintenance (7.5.2)
- Location Maintenance (1.1.18)
- Item Data Maintenance (1.4.3)
- Item Inventory Data Maintenance (1.4.5)
- Item Planning Maintenance (1.4.7)
- Item Cost Maintenance (1.4.9)
- Item Site Inventory Data Maintenance (1.4.16)
- Item Site Planning Maintenance (1.4.17)
- Routing Maintenance (Rate-Based) (14.13.2)
- Standard Operation Maintenance (14.9)
- Process Definition Maintenance (15.13)
- Work Order Routing Maintenance (16.13.13)

## Print and Print Preview for .NET Screens

A Print button is available on programs, inquiries, and browses. You can also preview the output using the new Preview button.

## Enhanced CTRL+F

In Desktop mode, you can get detailed information about a particular field by entering Ctrl+F when the cursor is in that field. This displays a pop-up window with the field information, which can be copied to the clipboard.

## Collapse Menu Item Display

The Collapse Menus option lets you display the top-level folders in the Application area. Select the option by right-clicking any menu item.

## Menu System Maintenance

The Menu System Maintenance program is available in .NET User Interface mode, and provides an improved user interface to the program.

## Favorites Now Stored on Server

Menu items identified as Favorites are stored on the server rather than on client computers. By default, favorites are stored in .dat files located in sub-directories in the `TomcatInstallDir/webapps/qadhome/configurations/ storage/user-data` directory.

## Active Directory Support

The QAD .NET UI supports Microsoft's Active Directory authentication for use with the Enforce OS User ID option in Security Control (36.3.24, mgurpmmmt.p). With Active Directory support, user passwords can be centrally managed. User accounts must be created in the QAD system, and the User ID must match the Active Directory User ID.

# QAD .NET UI 2.5.3 Release Notes

## Installation and Configuration Changes

### Language and Country Code Display

You define the display language for QAD .NET UI 2.5.3 in User Maintenance (36.3.1). Date and number formatting derives from the regional settings on the user's computer.

The date and number formatting uses only the regional settings on the user's computer for screens displayed in the default Desktop display mode. However, for screens displayed in the Desktop (Web Browser) and Terminal modes, or for screens viewed using the Character UI, the date and number formatting is based on the settings defined in the `locale.dat` file located in the QAD Enterprise Applications installation directory. Typically, the settings in the `locale.dat` file and the available regional settings on the user's computer are in agreement according to ISO locales. However, for non-ISO locale situations, such as a U.S. English user who wants to use French date and number formatting, you configure the non-ISO locale by:

- setting the language and country code in User Maintenance (36.3.1)
- modifying the `<UseLocalDateAndNumberFormats>` tag in the `client-session.xml` file
- checking the syntax of the `locale.dat` file.

## Application Changes

### Copy and Paste Issue

Previously, the ability to copy-and-paste was not activated for inactive fields or frames. This issue was resolved in this release.

### Date Format Issue

In Product Structure Maintenance, date fields (such as Start Date, or End Date) using date formats other than mm/dd/yy were causing an error for systems whose language and country code was other than en-US. This issue was resolved in this release.

### Percentage Field Issue

In the previous release, values entered in fields for percentages were not correctly stored. This issue was resolved in this release.

### Multiple Line Display Issue

In the previous release, in certain situations the display of multiple lines (for example, in Sales Order Maintenance (7.1.1), Sales Order Line), the display of lines could halt unexpectedly. This issue was resolved in this release.

# QAD .NET UI 2.5.2 Release Notes

## Application Changes

### Current Entity Change

Previously, Current Entity Change (25.1) did not function in the character UI. ECO P6HW resolved this issue. This patch applied to QAD Enterprise Applications 2007.1 (MFG/PRO eB2.1 SP6), QAD Enterprise Applications 2007 (MFG/PRO eB2.1 SP5), and MFG/PRO eB2.1 SP4.

### VAT Registration Format Init Description

Previously, utility information did not display correctly when running VAT Registration Format Init (2.15.3.25). ECO P6HC resolved this issue. This patch applies to QAD Enterprise Applications 2007.1 (MFG/PRO eB2.1 SP6), QAD Enterprise Applications 2007 (MFG/PRO eB2.1 SP5), and MFG/PRO eB2.1 SP4.

### Inquiry by Acct with Drill-Down Page Up Issue

Previously, the page-up feature did not function correctly in Inquiry by Acct with Drill-Down (25.13.20). ECO P6F5 resolved this issue. This patch applies to QAD Enterprise Applications 2007.1 (MFG/PRO eB2.1 SP6), QAD Enterprise Applications 2007 (MFG/PRO eB2.1 SP5), and MFG/PRO eB2.1 SP4.

### Container Workbench Delete Options Issue

Previously, delete options did not display correctly in Container Workbench (7.7.1) in QAD Desktop 2 or the QAD .NET UI with MFG/PRO eB2.1 Service Pack 5. ECO P6GX resolved this issue. This patch applies to QAD Enterprise Applications 2007.1 (MFG/PRO eB2.1 SP6), QAD Enterprise Applications 2007 (MFG/PRO eB2.1 SP5), and MFG/PRO eB2.1 SP4.

### Sales Order Shipper Maintenance Container Deletion

Previously, in the QAD .NET UI 2.5.1 and in QAD Desktop 2.9, in Sales Order Shipper Maintenance (7.8.9), you could not delete a container once you had attached it to a Shipper. The F5 key did function in the character UI but not in the QAD .NET UI. ECO P69M resolved this issue with a new Delete button. This patch applies to QAD Enterprise Applications 2007.1 (MFG/PRO eB2.1 SP6), QAD Enterprise Applications 2007 (MFG/PRO eB2.1 SP5), and MFG/PRO eB2.1 SP4.

### Cost Roll-Up Freeze Report Column Issue

Previously in QAD Desktop 2, Cost Roll-Up Freeze Report (13.12.2) did not display the values from the last column (frozen/unfrozen). ECO P5RX resolved this issue. This patch applies to QAD Enterprise Applications 2007 (MFG/PRO eB2.1 SP5) and MFG/PRO eB2.1 SP4, and is included with QAD Enterprise Applications 2007.1 (MFG/PRO eB2.1 SP6).

### Labor Feedback By Employee Frame Issue

Previously, in the QAD .NET UI (Windows Server only), Labor Feedback by Employee (17.2) did not proceed to the next frame after you clicked Next. ECO P6J4 resolved this issue, in combination with the Connection Manager startup script setting `dsu=off`. The startup script settings is accessed through

Administration | Connection Manager, Update configuration settings, Startup Script field. This patch applies to QAD Enterprise Applications 2007.1 (MFG/PRO eB2.1 SP6), QAD Enterprise Applications 2007 (MFG/PRO eB2.1 SP5), and MFG/PRO eB2.1 SP4.

### **Labor Feedback by Work Order Frame Issue**

Previously, in Labor Feedback by Work Order (17.1), you could not navigate to the Qty Completed fields in the lower frame, having completed the upper frame. ECO P6DM resolved this issue, in combination with the Connection Manager startup script setting `dsu=off`. This patch applies to QAD Enterprise Applications 2007.1 (MFG/PRO eB2.1 SP6), QAD Enterprise Applications 2007 (MFG/PRO eB2.1 SP5), and MFG/PRO eB2.1 SP4.

### **Purchase Order Maintenance Supplier Item Issue**

Previously, you could not complete Purchase Order Maintenance (5.7), if the Supplier Item had not already been defined using Supplier Item Maintenance (1.19). ECO P6NT resolved this issue, by introducing a warning message which does not prevent you from completing the screen. This patch applies to QAD Enterprise Applications 2007.1 (MFG/PRO eB2.1 SP6), QAD Enterprise Applications 2007 (MFG/PRO eB2.1 SP5), and MFG/PRO eB2.1 SP4.

### **Work Order Receipt Backflush Transaction Issue**

Previously, when using Work Order Receipt Backflush (16.12), you could not perform more than one stock transaction. ECO P6C4 resolved this issue. This patch applies to QAD Enterprise Applications 2007.1 (MFG/PRO eB2.1 SP6), QAD Enterprise Applications 2007 (MFG/PRO eB2.1 SP5), and MFG/PRO eB2.1 SP4.

### **Requisition Number Lookup Issue**

Previously, the lookup for the Requisition Number field on Intersite Demand Confirmation (12.17.1) did not function correctly in QAD Desktop. Desktop ECO P69X and MFG/PRO ECO P69V resolved this issue, by displaying only the requisitions related to the site specified in the Shipping Site field. This patch applies to QAD Enterprise Applications 2007.1 (MFG/PRO eB2.1 SP6), QAD Enterprise Applications 2007 (MFG/PRO eB2.1 SP5), and MFG/PRO eB2.1 SP4.

### **Cost Set Copy To Cost Set Issue**

Previously, in Cost Set Copy To Cost Set (30.3), you could not enter a question mark (?) in the Tolerance or Pct Change Allowed fields. ECO Q1LT resolved this issue.

### **Receipts Unplanned Issue**

Previously, in Receipts Unplanned (3.9), decimal values such as 0.0000x entered in the Quantity field were being displayed incorrectly after you entered the Tab key. ECO Q1LT resolved this issue.

### **Inventory Control Issue**

Previously, in Inventory Control (3.24), the Class A, Class B, and Class C field percentage (%) values were automatically reverting to their previous values. This issue has been fixed with ECO Q1LH resolved this issue.

### **Invalid Cookie Issue**

Previously, when you logged off from one environment without exiting the application, and then logged into another environment, the QAD .NET UI could display a fatal error and record an invalid cookie entry in the application log file. ECO Q1LR resolved this issue.

### **Case Sensitivity in Browse Group By Option**

Previously, the Group By option in browses was case sensitive on the QAD .NET UI, but not in the character UI. ECO Q1GK resolved this issue by making the option case insensitive in the QAD .NET UI.

### **Date Field Format**

Previously, if you entered a date without slashes (for example, in mmddy format instead of mm/dd/yy format), the date entered would no longer display when you moved to the next field. ECO P6GS resolved this issue.

### **Simplified Screen Template with Non-ASCII Characters in Name**

Previously, if you named a simplified screen template with non-ASCII characters, you could not delete the template. ECO P6G4 resolved this issue.

### **Saving Case Sensitive Changes in Fields**

Previously, the QAD .NET UI did not save changes correctly when the case of some letters was changed in a field. ECO P6DJ resolved this issue.

### **Component Name Truncated in Product Structure Maintenance**

Previously, a specified component name was truncated in Product Structure Maintenance. ECO P6QK resolved this issue.

### **Program Session Timeout**

Previously, active program sessions could close unexpectedly because of a QAD .NET UI home server session timeout configuration. This issue is resolved in this release.

### **Active Directory Support**

This release of the QAD .NET UI supports Microsoft's Active Directory authentication for use with the Enforce OS User ID option in Security Control (36.3.24). With Active Directory support, user passwords can be centrally managed.

# QAD .NET UI 2.5.1 Release Notes

## Installation and Configuration Changes

### Applications Support

QAD .NET UI 2.5.1 supports the following applications:

- MFG/PRO eB2.1 SP4
- QAD Enterprise Applications 2007 (eB2.1 SP5)
- QAD Enterprise Applications 2007.1 (eB2.1 SP6)

The following patches were required for the release:

- ECO Q186  
This patch was required to enable the MFG/PRO eB2.1 SP4 and QAD Enterprise Applications 2007 (eB2.1 SP5) applications.
- ECO Q1FD  
This patch was required to prevent Character UI Browse Maintenance (and browse engine) from accessing enhanced browse definitions defined in the QAD.NET UI that the Character UI cannot run. This was applicable to MFG/PRO eB2.1 SP4, QAD Enterprise Applications 2007 (eB2.1 SP5), and QAD Enterprise Applications 2007.1 (eB2.1 SP6)

### QAD ReportNet Bundle 1.0

The QAD ReportNet Bundle 1.0 is required only if you want to implement the advanced reporting and dashboard functionality to create custom reports or QAD-provided dashboards in the QAD .NET User Interface. The ReportNet Bundle 1.0 is included on the QAD .NET UI installation CD.

## Application Changes

### Multiple Instances of Same Program in Terminal Mode

Previously, you could not run two instances of the same program in Terminal screens. With this release, you can now run multiple instances of the same program in Terminal screens.

### Browse Engine Table Limit Increase

The QAD .NET UI 2.5 release introduced the improved Browse Maintenance program in .NET User Interface mode, which allowed you to define browses with more than 4 tables. In the QAD .NET UI 2.5.1 release, the browse engine can process browses with up to 30 tables. However, the Character UI cannot process browses with more than 4 tables. Apply patch ECO Q1FD to prevent the Character UI Browse Maintenance (and browse engine) from accessing the enhanced browse definitions defined in the QAD .NET UI that the Character UI cannot run.

# QAD .NET UI 2.5 Release Notes

## Application Changes

### Language Support

The following languages were supported in this release:

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

The following languages had limited support with some new terms appearing in English:

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

### Configuration Files

Default configuration files were consolidated in a `TomcatInstallDir/webapps/qadhome/configurations/default` directory. These files consist of :

- Client bootstrap configuration file (`client-bootstrap.xml`)
- Client session configuration file (`client-session.xml`)
- Menu extension configuration file (`.../menus/plugin-menu.xml`)
- You can now define additional system environments by creating directories under the configuration directory.

## Viewing Configuration Settings

Configuration settings that could not be changed directly from the QAD .NET UI client were now displayed in Help|View Configuration. The view includes a Search facility.

## Heartbeat URLs for Load Balancing

Heartbeat URLs were created under `TomcatInstallDir/webapps/heartbeat/` to let system administrators setting up a load balancer for multiple Tomcat instances check connection status for each instance.

Load balancing scripts (or other custom status scripts) could access the following links under `http://TomcatHost:TomcatPort/heartbeat/`:

- `status.jsp` — returns a status message number of agents that are: (All / Idle / Init / Busy)
- `idle.jsp` — returns a page containing the number of idle connections
- `busy.jsp` — returns a page containing the number of busy connections
- `init.jsp` — returns a page containing the number of initializing connections

## Selecting Systems at Login

When you have multiple environments installed, you can select an environment from the drop-down list on the login screen.

## Process Map Enhancements

A number of enhancements were made to Process Map functionality in this release.

- A new Process Map storage directory was created, `QADDesktopBase/webapps/WEB-INF/pronav/xml`. This directory contains a sub-directory for each language into which maps have been translated.
- The Process Editor was enhanced to include a Background Color field for the grid background, and a Row/Properties Column section in which to specify row or column colors. A new Text Node was added, as well as Text Color, Stroke Color, Fill Color, Stroke Width and Dash Width fields to enhance map design options. Connector Properties were improved with new shapes, and a new icon was added to indicate that this node is linked to another node, program or browse.
- The Process Map Viewer was enhanced to let you edit maps while in View mode, and a zoom option was added to improve display.
- In this release, you can also save process maps as Favorites.

## QAD Business Intelligence Integration and QAD BI Dashboards

When integrated with QAD Business Intelligence (BI) version 2.5, QAD .NET UI 2.5 provided support for business intelligence dashboards, including:

- Sales Manager Dashboard
- Purchase Manager Dashboard
- Warehouse Manager Dashboard

When installing QAD BI, you must install the QAD ReportNet Bundle 1.0, which was included on the QAD .NET UI 2.5 CD. Before installing the QAD ReportNet Bundle, you must first install Cognos 8.

The QAD ReportNet Bundle is required only if you want to implement the advanced reporting and dashboard functionality to create custom reports or QAD-provided dashboards in the QAD .NET user interface.

QAD ReportNet Bundle 1.0 is an optional component of QAD .NET UI 2.5 and must be installed after QAD .NET UI 2.5 and Cognos 8.2 are installed and properly configured. For information about implementing the QAD .NET UI 2.5, see *Installation Guide: QAD User Interfaces*.

The ReportNet Bundle installation steps are described in *Installation Guide: QAD Business Intelligence*.

## Browse Enhancements and Browse Maintenance

Improvements to the Browse function for this included:

- Usability improvements in the toolbar
- Improved save browses mechanism (for example, saving a browse directly to Favorites)
- Improved up/down arrow behavior (selecting a row by clicking and using up/down arrows to move rows)
- Editing within rows by clicking a selected row.
- Double-clicking on a row to execute the primary drill. A lookup returns the row on a double-click.
- A Create button to launch the corresponding maintenance program for the browse, and Modify, Delete, Copy, and Report buttons

Browse Maintenance was also enhanced in the following ways:

- You could create browse definitions using a graphical drag-and-drop approach.
- Views were now created automatically within browses.
- Browses were now backwards-compatible with Browse Maintenance in Desktop (WebSpeed) and the Character UI. You could maintain browses using Desktop or Character UI Browse Maintenance.
- There was no limit to the number of tables you can include with Browse Maintenance. However, including more than four tables can cause the Browse Engine to halt. The Browse Engine was originally designed with a four-table limit to avoid Progress performance issues.
- The Browse search feature was streamlined so that instead of having Quick Search and Advanced Search, you now had a powerful Search feature that includes the features of the Advanced search. You can create multiple search conditions as with the Advanced Search in previous releases.
- Selected browses now included New (to link to the program you use to create the browse item) and Edit (to link to the program you use to modify the browse item) buttons.

## Browse Collection Maintenance

Browse Collection Maintenance was introduced to help you browse and maintain related item, site, sales, location, and customer data, by defining collections of related browse and maintenance programs.

**Note** Browse Collection Maintenance is only available if you have access to the Administration menu.

In a browse collection, a main browse drives the fields selected in the other browses and programs. The QAD .NET UI displays the other browses and programs in the lower part of a horizontal split-screen, with the main browse located in the upper part. Browse collections can be saved under Favorites.

### Menu Collection Maintenance

Menu Collection Maintenance was introduced to let you define collections of menu items such as programs, browses, process maps, and dashboards. You can place menu collections in any folder in the Applications area. The default location for menu collections is the Menu Collections folder.

**Note** Menu Collection Maintenance is only available if you have access to the Administration menu.

### Cancel Transaction on Drill Change Option

The Options menu (Tools|Options) was enhanced with a Cancel transaction on drill change option that specifies the default action when a drill item changes.

### QAD .NET UI Screens from XML

By default, programs you launch in the QAD .NET UI typically open in Desktop mode, which specifies that program screens display based on XML data using .NET technology. The Desktop (Web Browser) mode specifies that programs display based on an HTML screen generated from the QAD Desktop application.

In this release, the Simplified Screen designer does not work in screens displayed in the new Desktop mode.

### Home Page

You can now define a home page and assign it to any URL, including the new QAD Shell URL (see “Invoking QAD .NET UI Menu Items By URL (qadsh://)” on page 85). From Tools|Options, the Enable Home Page setting specifies whether the home page displays upon login. The home page URL setting specifies the URL of the home page, which can be any URL (http:// or qadsh://).

### Drag-and-Drop Favorites

You can now drag-and-drop URLs from Internet Explorer or Mozilla Firefox to the Favorites area, where the link will be saved as a favorite. You can also drag-and-drop an item from the file system (for example, from Windows Explorer) to the Favorites area, where a link to the item will be saved as a favorite, and also drag-and-drop programs (executables).

### Change Favorites Icons

You can now change the icon of any menu item saved in the Favorites area by right-clicking on the item and selecting Change Icon from the pull-down menu. You can then select a new image to use as the icon from the browse dialog box.

### New Left Panel Navigation Styles

This release of the QAD .NET UI includes a variety of styles for the left navigation panel, including the following:

- ExplorerBar

- ListBar
- ToolBox
- OutlookNavigationPane
- VisualStudio2005Toolbox (the default)

To set the left panel navigation style, select Tools|Options. In the Options window, under General, open the pull-down menu for Left Panel Navigation Style and select a style.

### New Prompt User Terminal Authentication Setting

The PromptUser setting for terminal authentication was added to ShellUser and ScriptUser in this release. With PromptUser, when a terminal screen is launched, and the user is prompted for a user ID and password to log into the server operating system.

The terminal authentication method is now specified by the <TerminalAuthentication> element in the client session configuration file, located in

*TomcatInstallDir/webapps/configurations/client-session.xml*.

### Invoking QAD .NET UI Menu Items By URL (qadsh://)

You can access QAD .NET UI using the following QAD-defined URL:

qadsh://menu/invoke?*argument\_list* , where *argument\_list* can include optional arguments, summarized in the following table.

Argument	Value	Description	Required	Multiple
workspace-key	A workspace key	If provided the container will activate the workspace before forwarding the request to any service providers.	No	No
menu-key	A menu key	The menus that should be searched for the menu keys and aliases. If not specified, all menus in the activated workspace will be searched.	No	Yes
menuitem-key	A menu item key	The keys indentifying menu items to execute.	No	Yes
menuitem-alias	A menu item alias	The aliases indentifying menu items to execute.	No	Yes
browse-search	A table name, a field name, an operator, start value, and end value (optional).	The fields are comma delimited and multiple search conditions can be applied by adding additional parameters to the URL. The operator can be one of the following: = <> < > <= >= contains range isnull isnotnull  The start value specifies the value or the start of a value range if the optional end value is included.	No	No

## **Workspace Activation**

When you login to the QAD .NET UI, the system uses the active workspace from the previous session. However, if there was not a previous session or if the last activated workspace is not valid for the new session, then the QAD .NET UI activates the primary workspace for the user as specified in the User Maintenance program, or the first workspace listed in the Workspaces pull-down menu.

Information about the last active workspace and the ordering of workspaces is set on the client, and the information about the primary workspace is set on the server. Consequently, if a user switches computers, or logs into a different system, the active workspace depends on the client-side settings of the new computer or the server-side setting of the new system.

## **Detaching Screen to New Window**

In this release, you could detach a screen and display it in a separate window, using the right-click Move Tab to New Window option, or by entering Ctrl+F11.