QAD Enterprise Applications
Standard & Enterprise Edition

Training Guide
QAD .NET UI

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QAD 2010 Standard and Enterprise Edition
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QAD Inc.
100 Innovation Place
Santa Barbara, California 93108
Phone (805) 566-6000
http://www.qad.com

Contents

About This Course

Course Description

QAD designed this course to cover the basics of using the QAD Enterprise Applications Standard Edition (SE) and Enterprise Edition using the .NET UI.

The course includes:

- An introduction to the QAD .NET UI.
- Navigating the .NET UI.
- Application help options.
- .NET UI programs
- Basics of Browses

Students will also learn by labs designed to reinforce concepts presented in this training guide.

Objective

Learn how to navigate both the Enterprise (EE) and Standard (SE) editions of QAD Enterprise Applications. In addition, students will be able understand the help options, different programs and be able to use browses effectively.

Benefits

Students will become more efficient in the use of QAD Enterprise Applications.

Audience

- Implementation consultants
- Members of implementation teams
- Key users

Prerequisites

- Some familiarity with Enterprise (EE) and Standard (SE) editions of QAD Enterprise Applications

Course Credit and Scheduling

This course is designed to be taught in two days.

Virtual Environment Information

The hands-on exercises in this book should be used with the “Standard Edition r01 - Training” environment, in the “Training” workspace.

QAD Resources

If you encounter questions or problems on QAD software that are not addressed in this book, several resources are available.

Product Help

All QAD products ship with integrated help systems. including Character UI Help, .NET UI Help, QAD Assist, and QAD Guide Me help. In addition QAD has extensive Web Resources

The QAD website provides product and company overviews.

http://www.qad.com/

From QAD’s main site, you can access QAD’s Learning or Support sites.

QAD Learning Portal for Training Opportunities

To view available training courses, locations, and materials, use the QAD Learning Portal. Choose Learning under the Global Services tab to access this resource.

QAD Support for Product Documentation and the QAD Knowledgebase

To access release notes, user guides, installation and conversion guides by product and release, visit the Support website. Support als2o offers an array of tools depending on your company’s maintenance agreement with QAD. These include the Knowledgebase and direct links to QAD Support experts.

Choose Support under the Global Services tab.

Any QAD customer can register for a QAD web account by accessing the Support web site and clicking the Accounts link at the top of the screen. Your customer ID number is required. Access to certain areas is dependent on the type of agreement you have with QAD.

Chapter 1

Introduction to QAD .NET UI

Objective

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Chapter Objective

- Students will introduced to the following in the QAD .NET UI:
  - The different types of UI mode in QAD Enterprise Applications
  - Attributes of component-based and non-component based programs
  - The QAD .NET UI Login window

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Benefits

Chapter Benefits

- Students will understand the following in the QAD .NET UI:
  - The different UI modes available in QAD Applications
  - The different attributes of component-based and non-component based screens
  - How to log in to the QAD .NET UI

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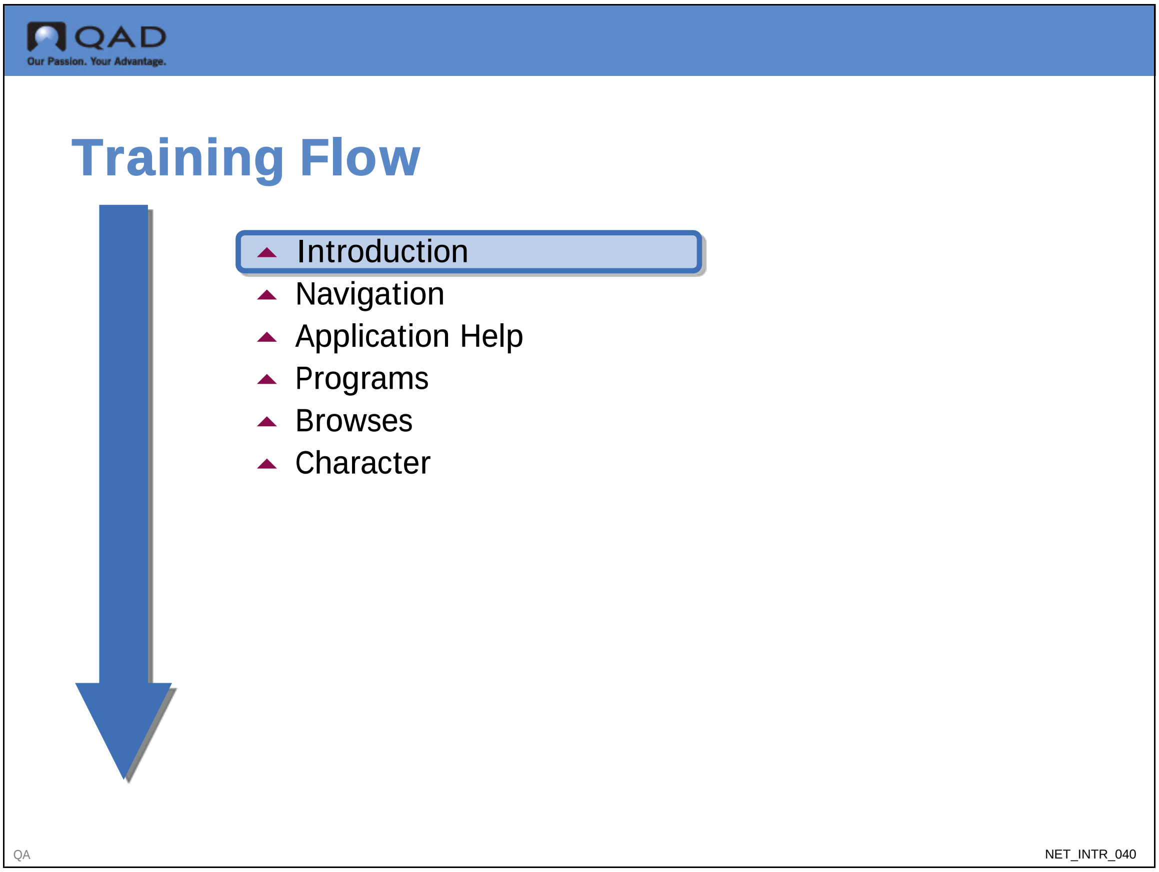
Training Flow



Introduction

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Introduction

- The QAD .NET UI
  - Microsoft Technology
    - Incorporates familiar UI features
    - Reduces learning effort by users
  - One interface, two modes
    - QAD .NET UI
    - Terminal Mode (rendering of Character UI)

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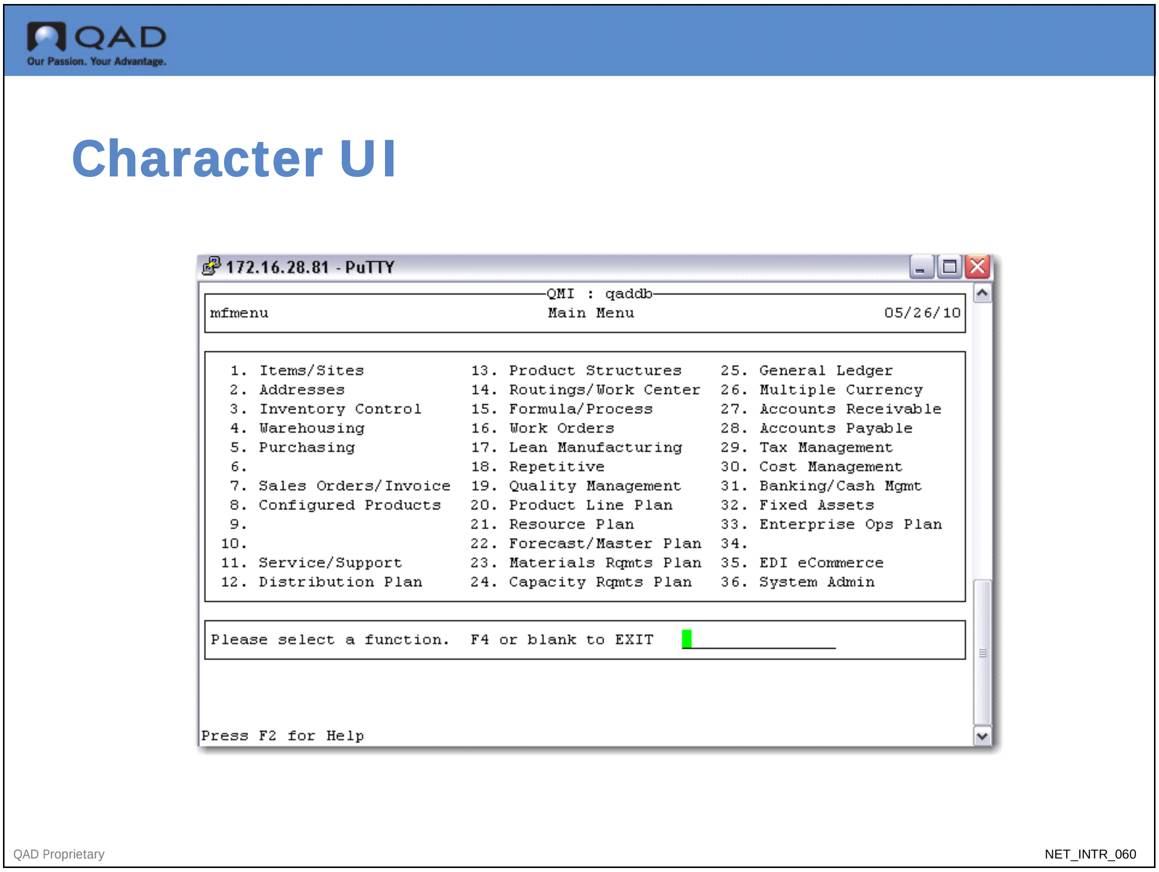
Character UI

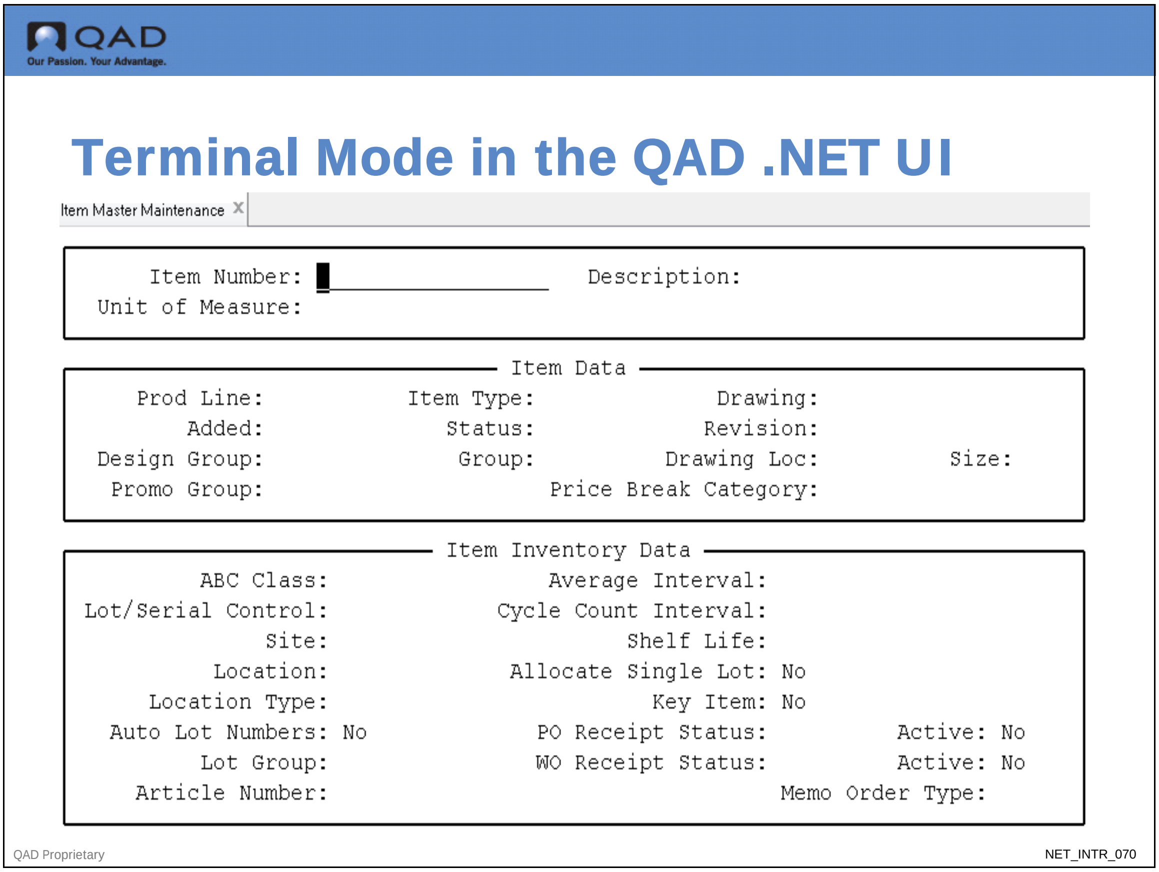


Unlike the QAD .NET user interface, the character user interface depends completely on input from the keyboard. Because it is not a graphical user interface, all navigation is based on:

- A command-prompt interface to execute programs
- Combinations of keystrokes to issue commands within programs
- Navigation without use of a mouse through the UNIX character interface.

Component-based functions are accessible only through the QAD .NET UI. You cannot access any of these functions from the Character UI.

Terminal Mode in the QAD .NET UI



With the QAD .NET UI interface, you can still use non-component based programs in a CHUI interface. You do this by selecting Terminal Mode in the Program Properties option. This is described in the section on Programs.

Attributes of Component-Based Programs

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Attributes of Component-Based Screens

- Underlying Microsoft.NET Technology
- Traditional Windows screen navigation
- Familiar click and point functions
- Right-click options

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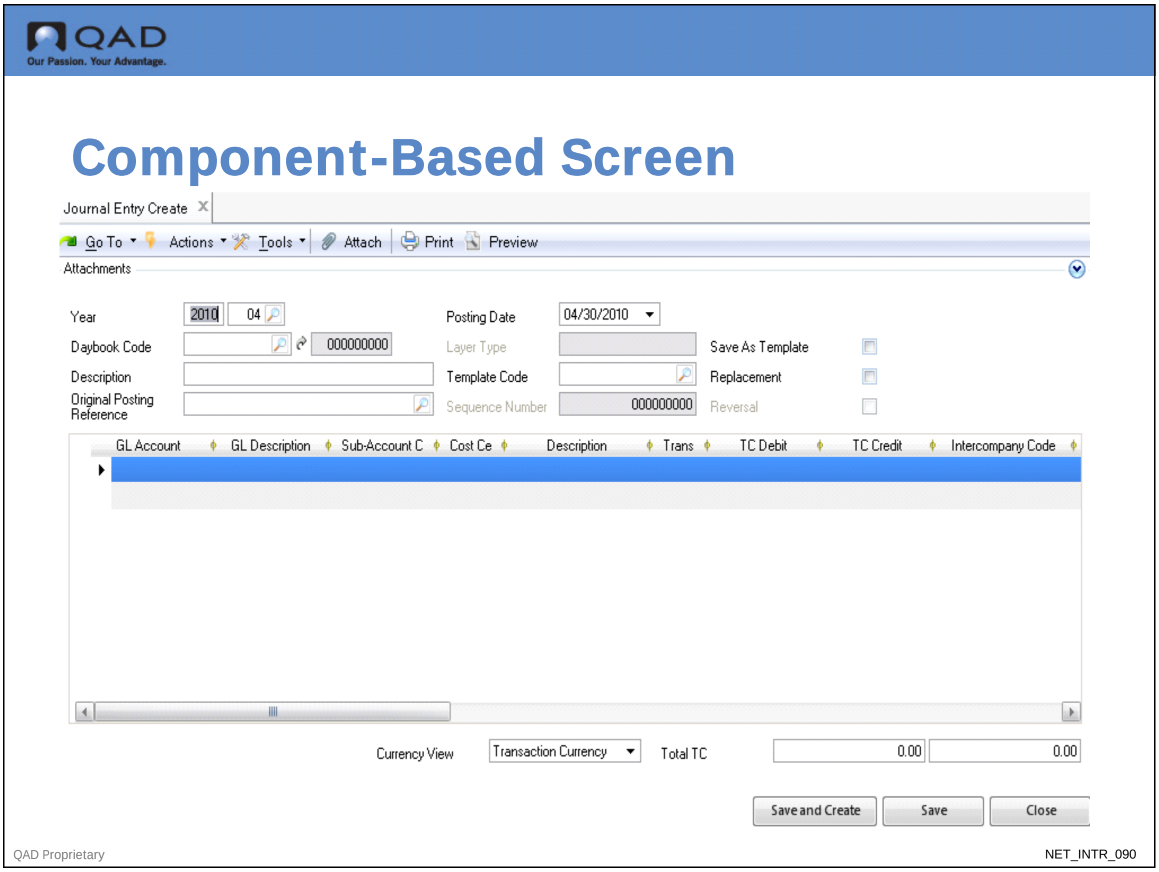
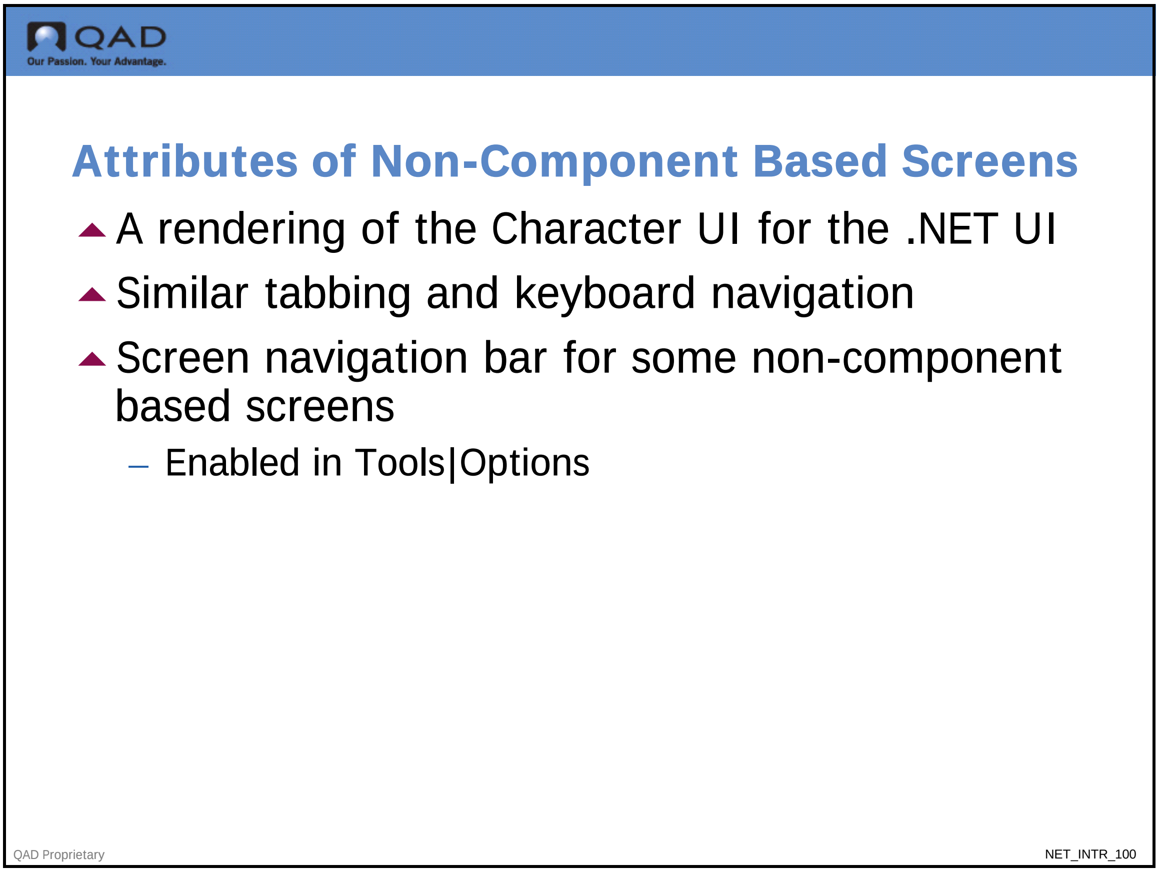
Component-Based QAD .NET UI Screen



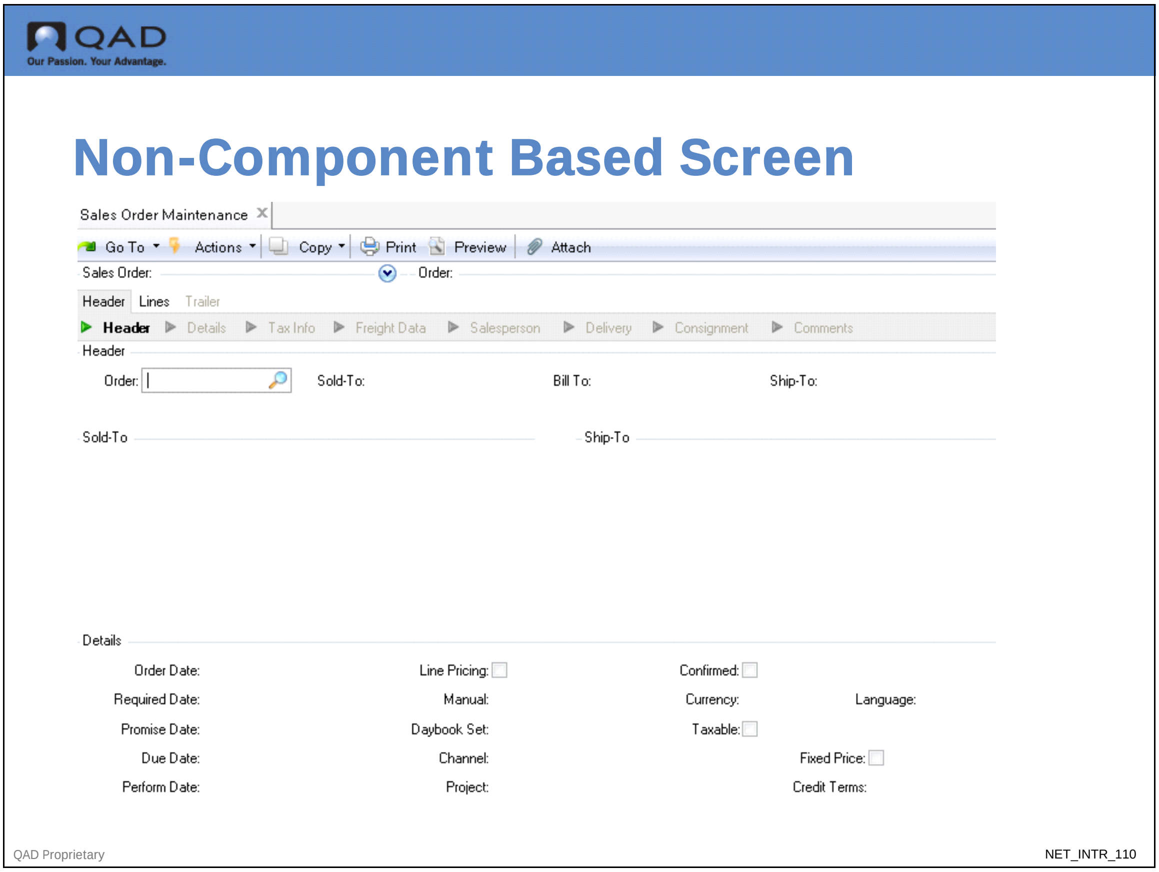
You use traditional mouse-clicks, tabs, and keyboard tabbing to navigate the component-based screen.

Attributes of Non-Component Based Screens



Non-component based screens are based on traditional procedural-written Progress-based technology.

Non-Component Based QAD .NET UI Screen



All Standard and Enterprise Edition programs are non-component based, except QAD Enterprise Financials.

Login Menu

Starting the QAD .NET UI

To launch the client, select the QAD Applications icon or Menu item under Programs on the Start Menu. Enter your assigned user and password if assigned. Select a system environment for which you have permissions from the drop-down menu.

Summary

Chapter Summary

- There are different types of UI mode within the QAD .NET UI
- Component and non-component based screens have different visual and navigation attributes
- You launch the QAD .NET UI from a menu option or desktop icon and select an environment from the drop-down menu

NET_INTR_130

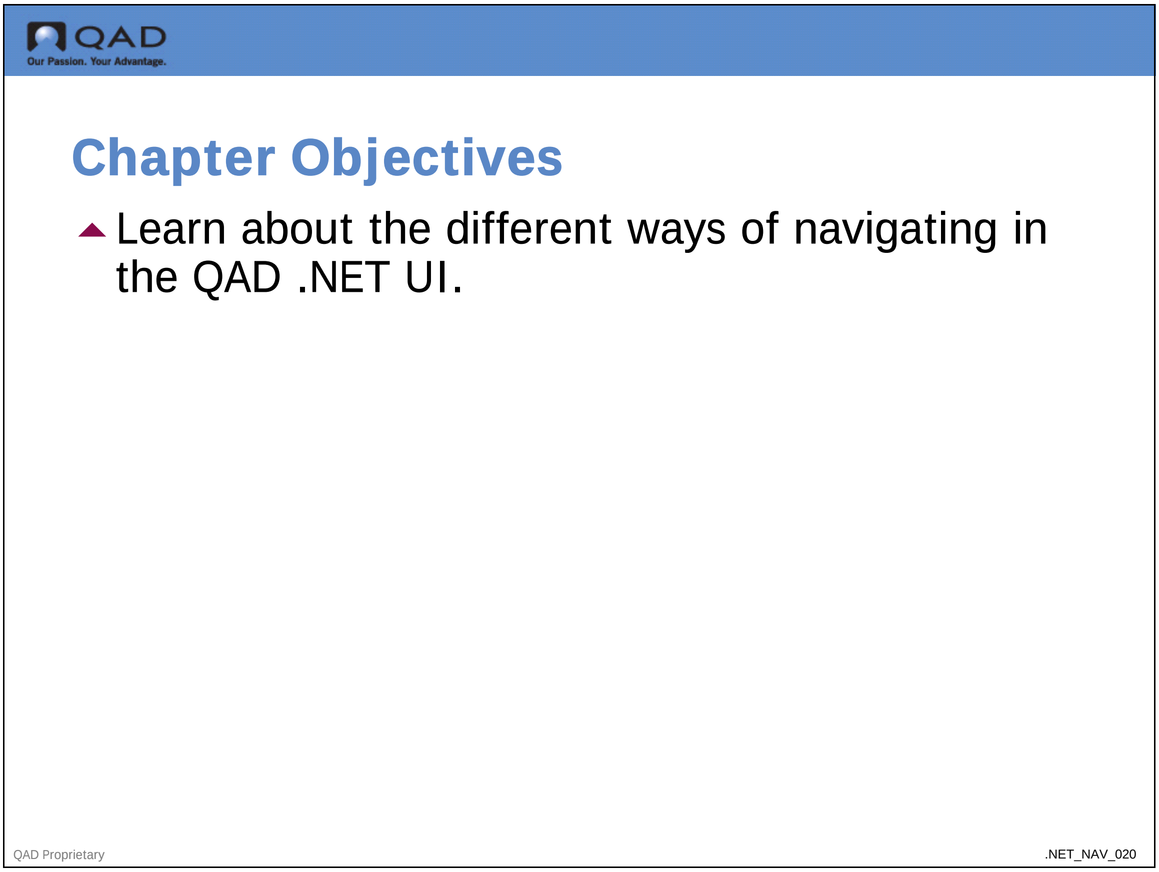
Exercise and Knowledge Check

1. You can use the mouse for certain functions in Terminal Mode. (T/F)
2. Some component-based functions are configurable in Terminal Mode. (T/F)
3. Which of the two interfaces depends completely on input from the keyboard?
4. Which Enterprise Edition application is component based?

Chapter 2

Navigating the QAD .NET UI

Objective


QAD
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Chapter Objectives
Learn about the different ways of navigating in the QAD .NET UI.
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Benefits

Chapter Benefits

- You will be able to navigate the different types of screens and programs within Enterprise Applications.

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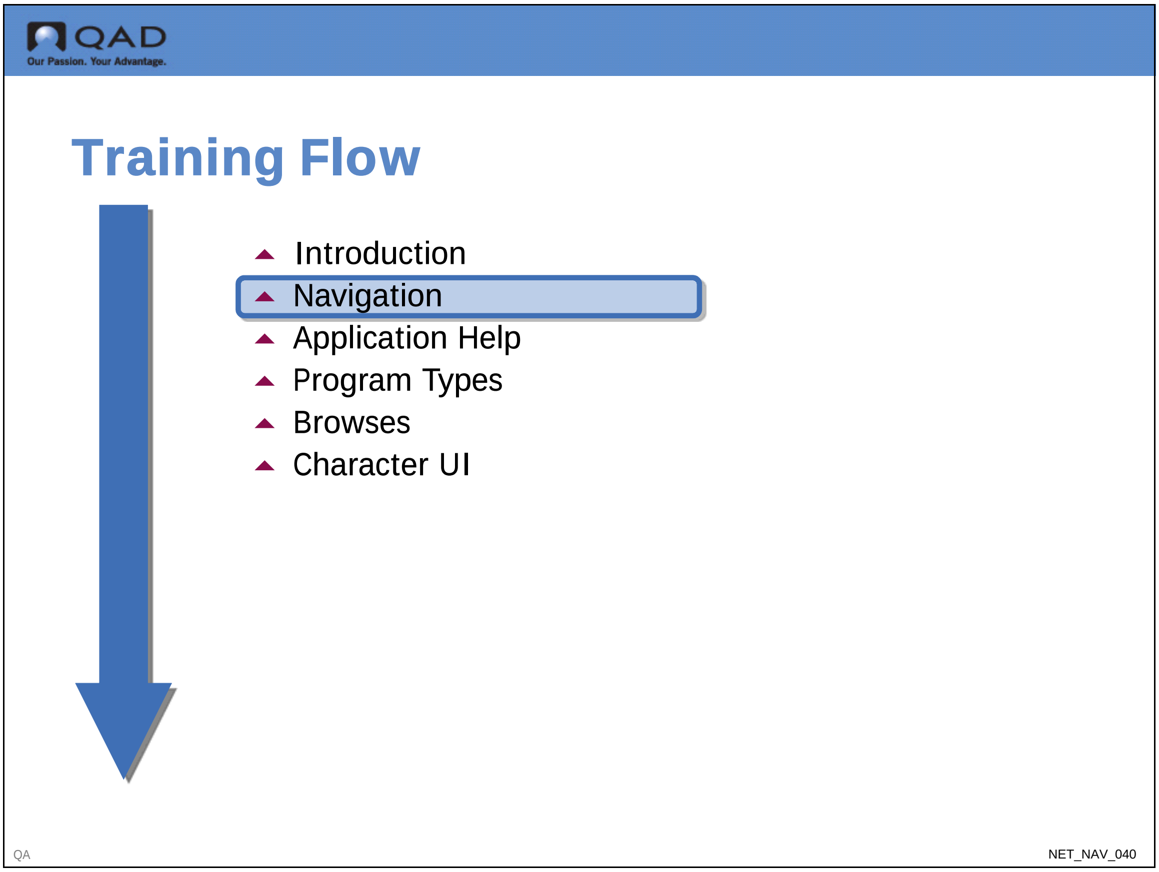
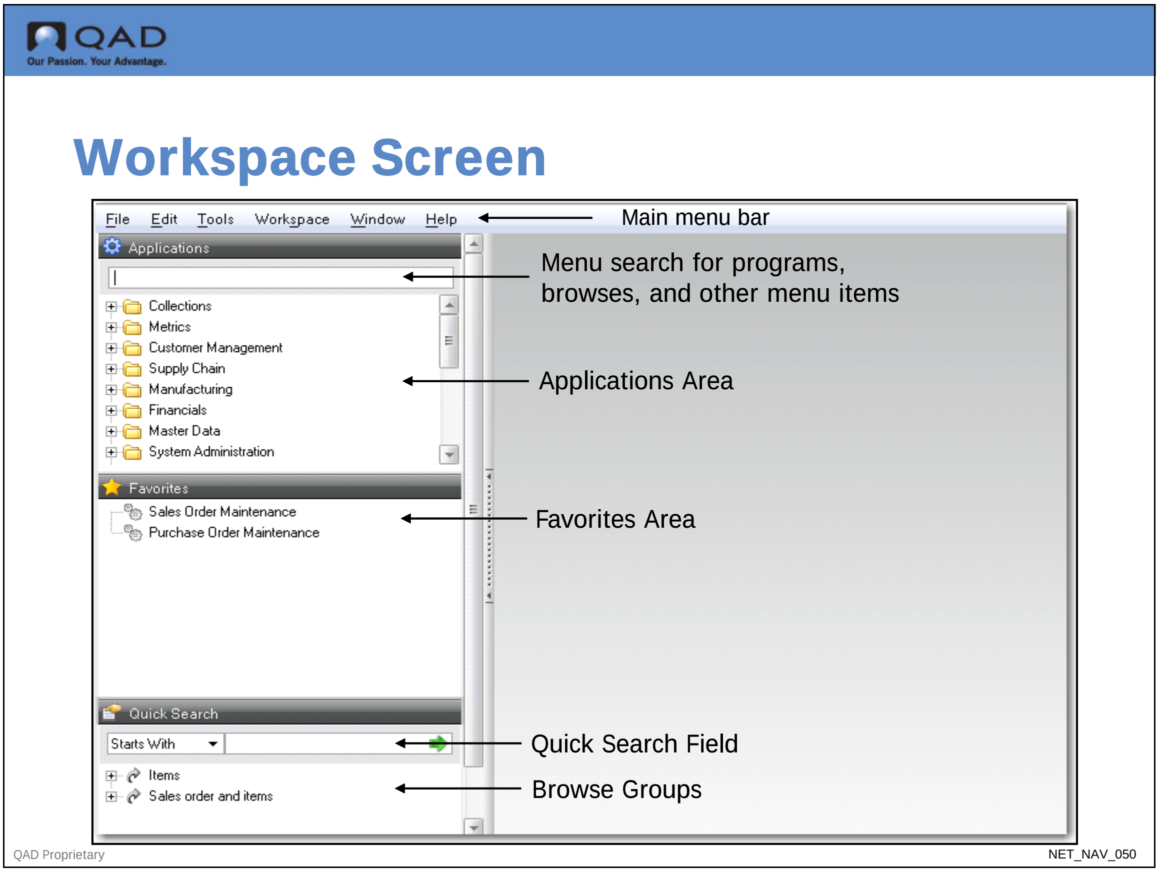
Training Flow



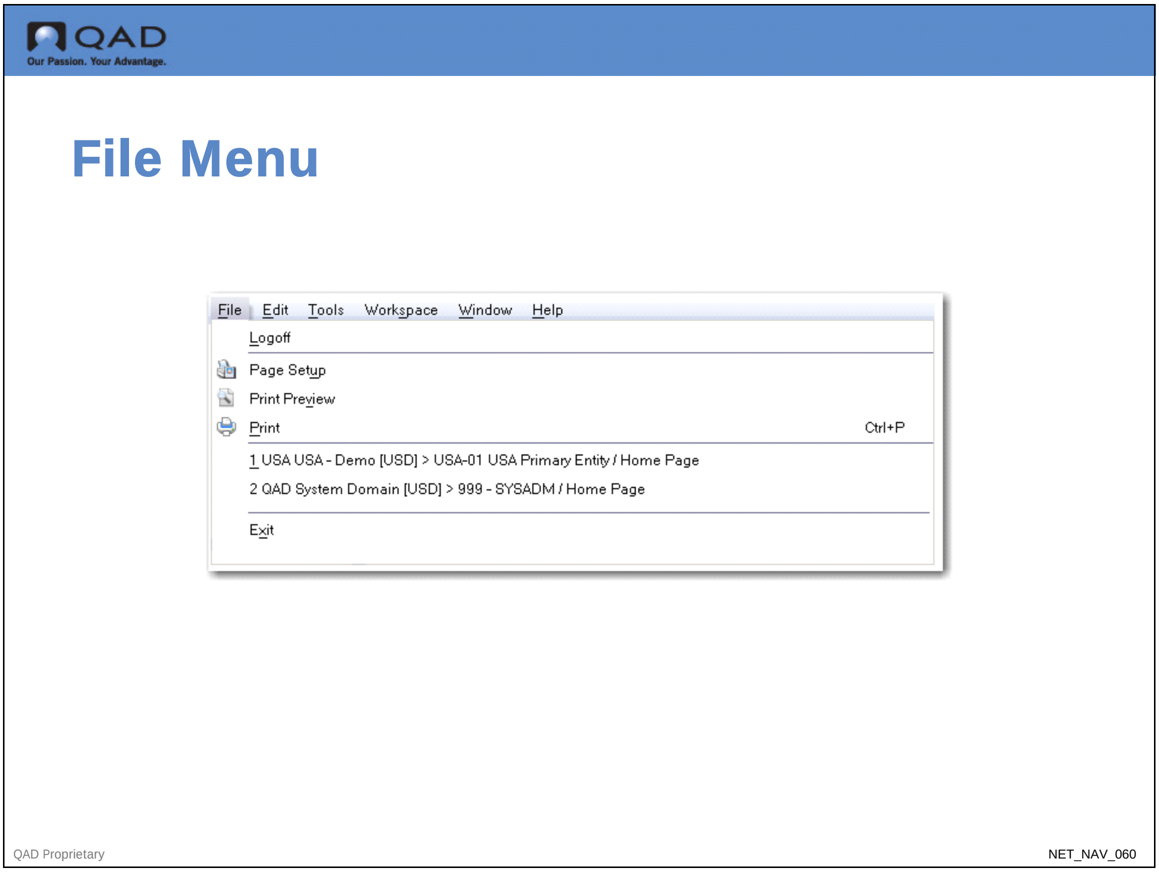
Workspace Screen



Workspace Screen

- Main menu bar. Includes file, edit, tools, workspace, window and help.
- Menu search. Locates screens.
- Application area. Displays the applications that are available in the QAD .NET UI.
- Favorites area. Lists fequently used screens.
- Quick search area. Search for a value across all of the fields in the browse.
- Browse Groups. Creates groups of browses for quick search purposes.

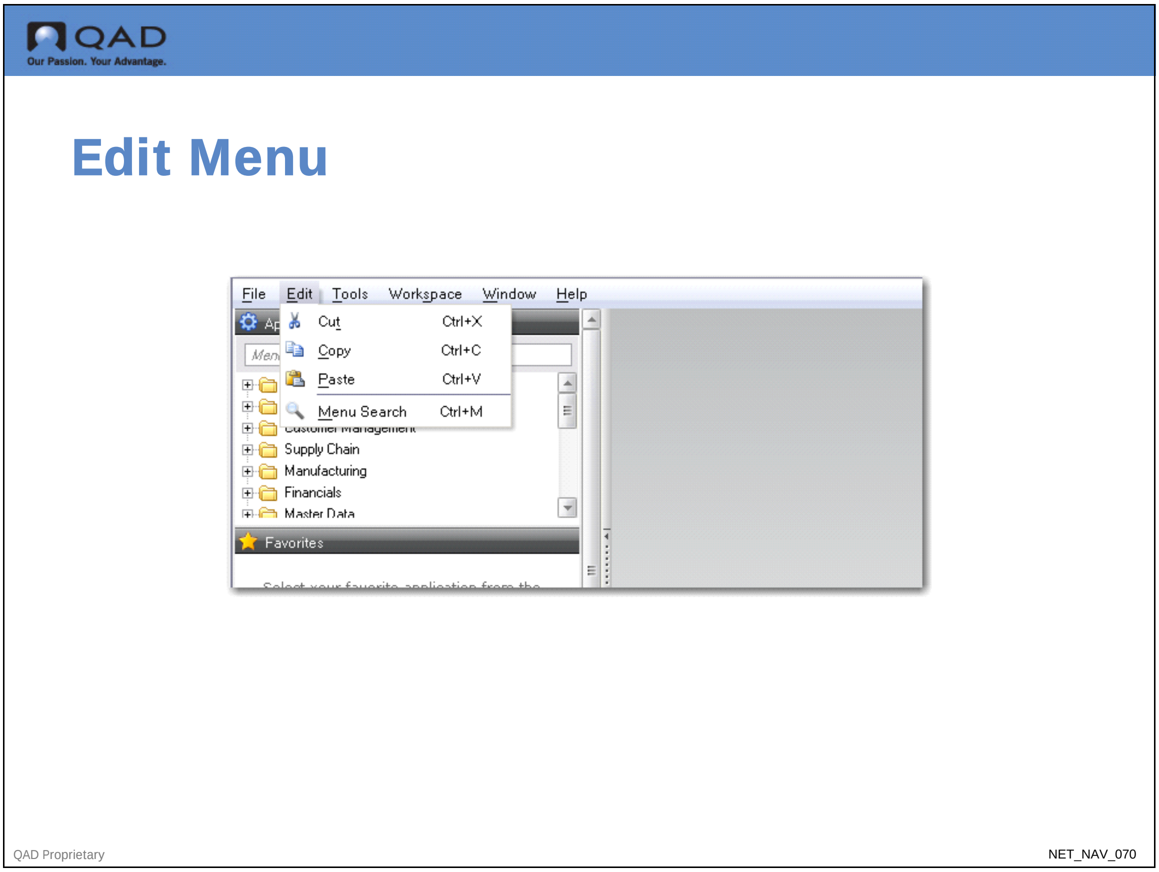
File Menu



The File menu commands include:

- Logoff/Login. Log off from all applications running in the QAD .NETUI. You can login as a separate user is security allows.
- Page Setup. Defines print output for browses. This has no impact on maitenace programs
- Print Preview. Generates a print preview of a browse prior to print.
- Print. Open the print dialog so that you can print the data for a browse or the screen for other programs.
- Program History. The section below Print displays the last six programs that you have opened. You can choose to open one of these programs directly from this pull-down menu.
- Exit. Close the QAD NET UI and log off any open applications.

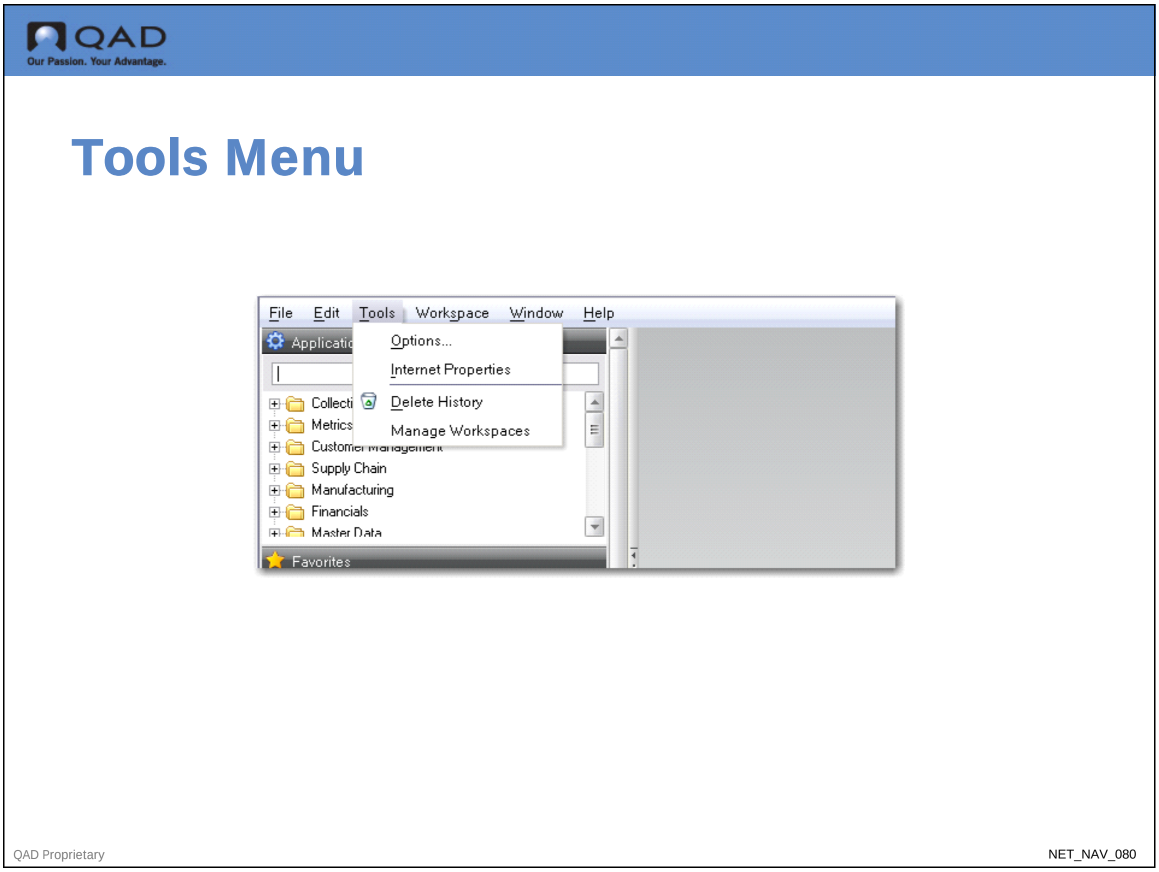
Edit Menu



The Edit menu commands include:

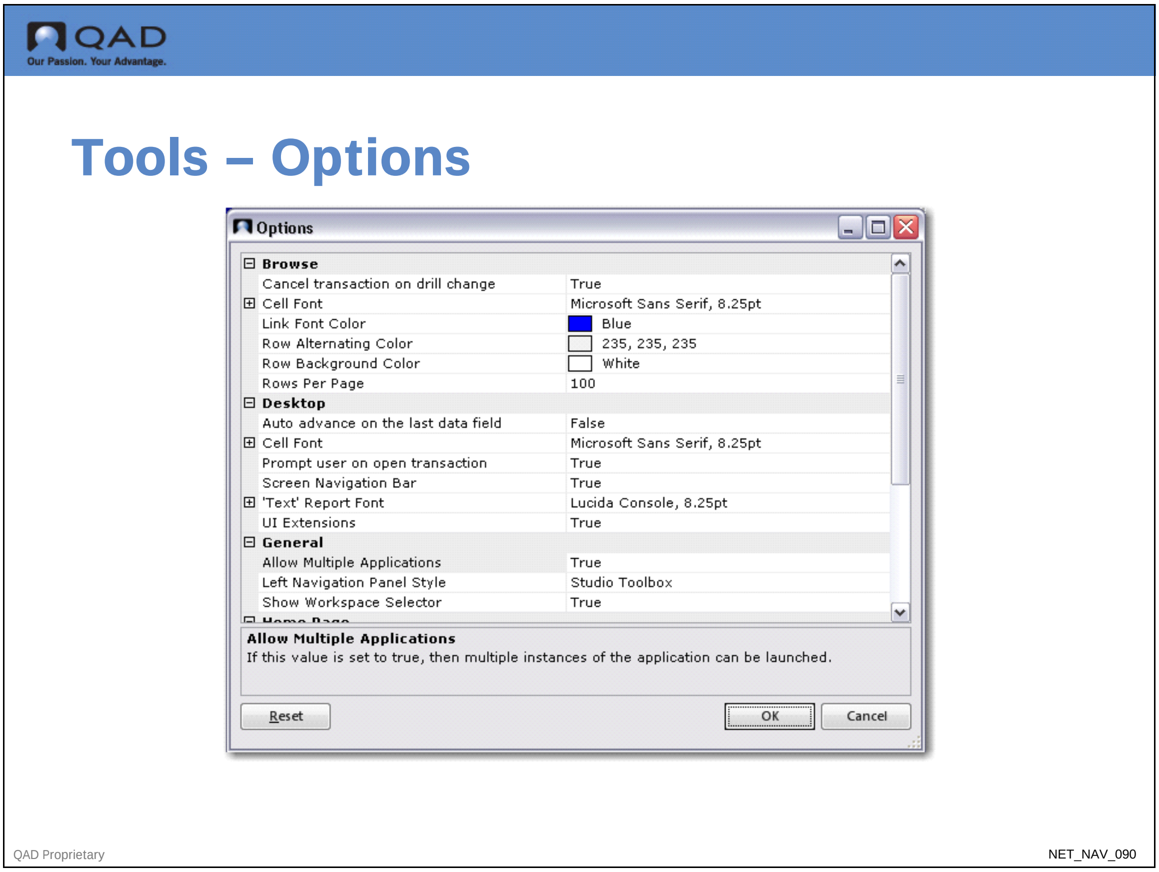
- Cut, Copy, and Paste. These are standard Microsoft commands. View associated shortcuts on the screen above.
- Menu Search. While In any screen you can immediately go to Menus search by using the shortcut Ctrl + M or select menu search.

Tools Menu



- Options. View administrative information and set personal options for browses and other application settings. For more information, see next slide Settings the user cannot configure are viewable from Help|View Configuration.
- Internet Properties. Update the same settings that display when you select Internet Options from the Tools menu in Internet Explorer.
- Delete History. Delete the following data Temporary files: Internet Explorer cache and IE cookies, and cached resources created for the current configuration.Session information: the graphical state stored by the GUI persistence manager. Also deletes user input, such as last configuration, last workspace, most recently used menu items, and credentials.
- Manage Workspaces. Activate and deactivate workspaces from a list and reorder them.

Tools|Options

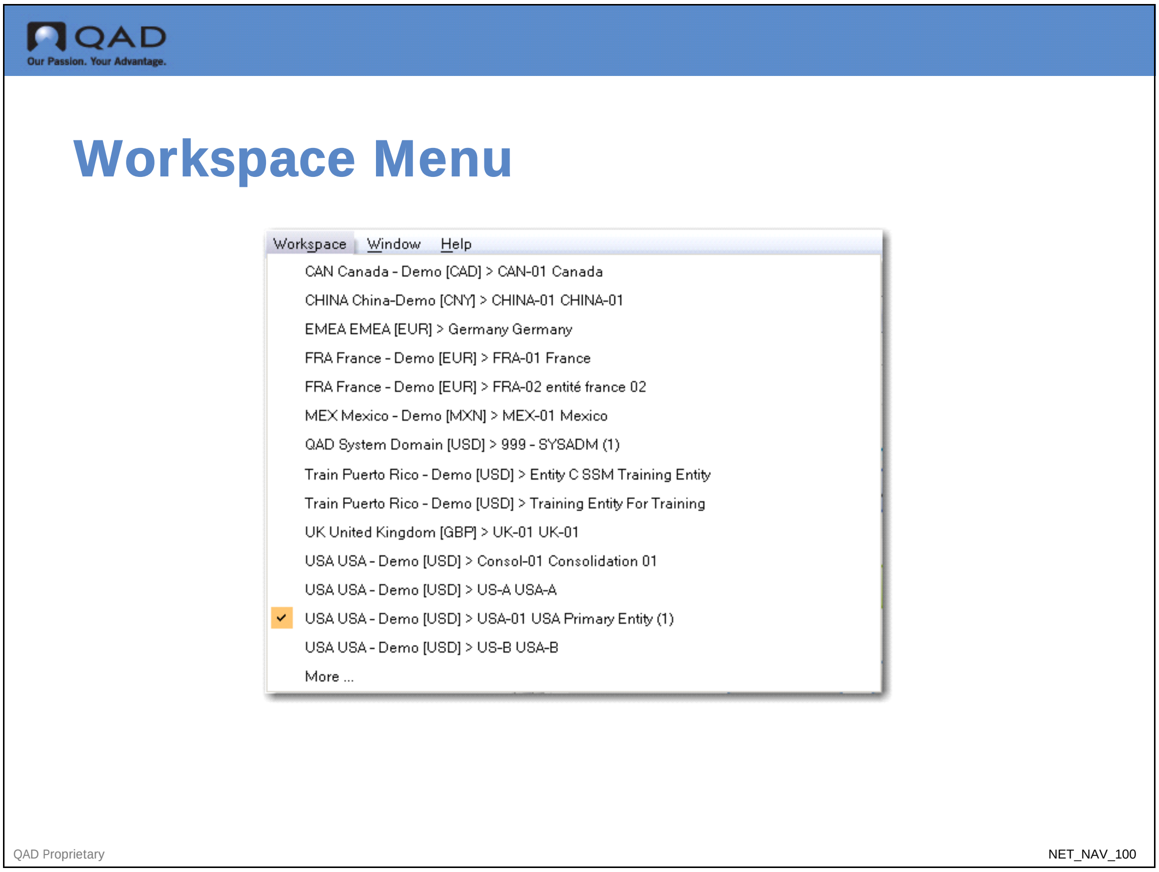


Field Descriptions

- Cancel transaction on drill change. On a maintenance screen, you can then use the up and down arrows on the keyboard to select next item from an attached look-up browse. If trues the capability is true if false then the next item will not populate.
- Cell Font. Specify standard windows font name, style, and size to use for cell data values.
- Link Font Color. Choose the color to use for hot-linked data values. You can choose system colors, Web colors, or custom colors from a color palette
- Row Alternating Color. Specify the background color for every other row in the browse display.
- Row Background Color. Specify the background color for data rows in browses.
- Rows Per Page. Specify the number of data rows to retrieve for each browse page of data in the browse. The default is 100.
- Desktop Auto advance on next data field. Specify whether to go to the next frame after leaving the last field in the current frame.
- Cell Font. Specify the font name, style, and size to use for cell data values. This field displays a standard Windows font dialog where you can select a font, font style such as bold or italic, and font size.

- Prompt user on open transaction. When you close a program that has a transaction running, you can have the QAD NET UI prompt you to double-check whether you want to close the program.
- Screen Navigation Ba**r**. To help you navigate complex screens, the QAD NET UI includes a navigation tool for selected programs. This option specifies whether to include the screen navigation bar when displaying selected programs.
- Text Report Font. Specify the font in which reports are displayed when output to text.
- UI Extensions. Specify whether to include additional UI extensions such as enhanced button labels.
- General Allow Multiple Applications. Specify whether you can launch multiple instances of the QAD NET UI.
- Left Navigation Panel Style. Specify the appearance of the left navigation panel, which includes the Applications Pane, Favorites Pane, and Role Menu Pane. .
- Enable Home Page. Specify whether the home page displays in the Home Page tab when you log in.
- Internet Properties. Update the same settings that display when you select Internet Options from the Tools menu in Internet Explorer.
- Delete History. Delete temporary files, session information, user preferences, and log file data.

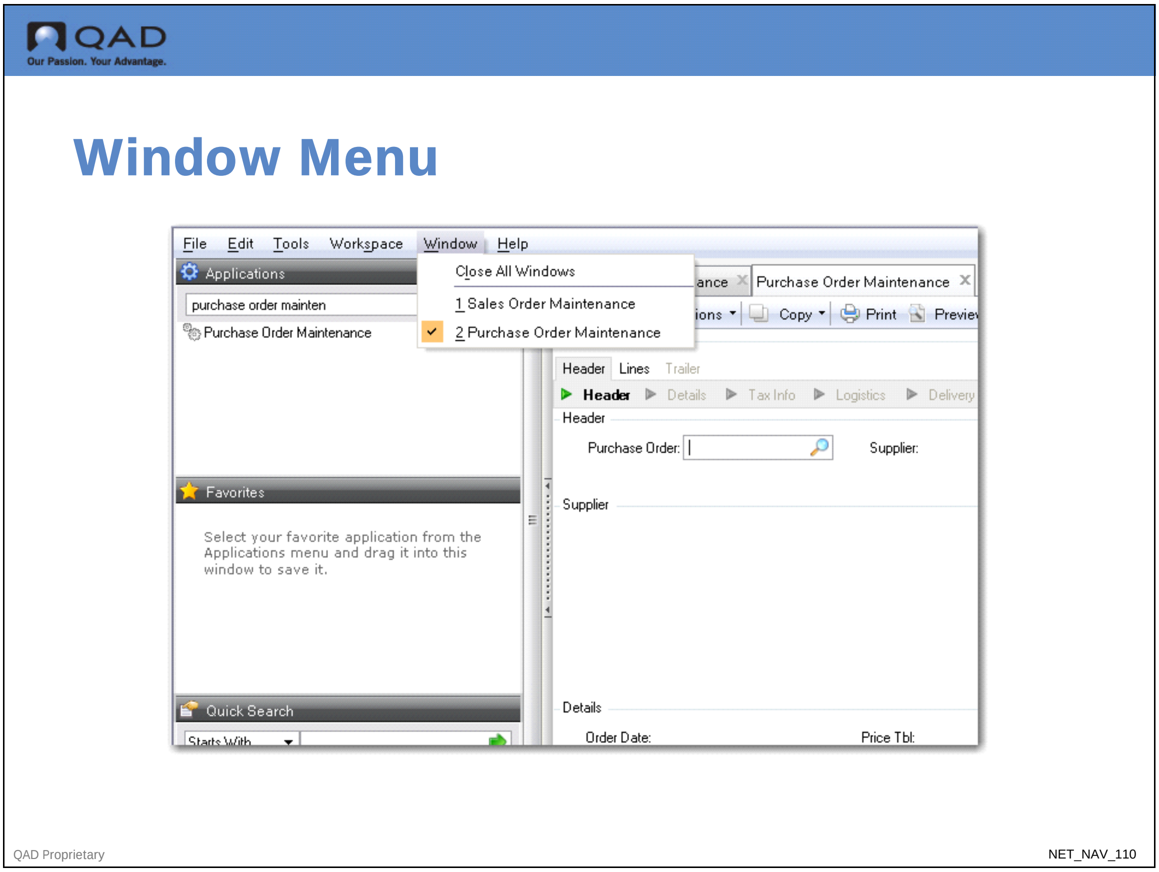
Workspace Menu



Manage Workspaces*.* Activate and deactivate workspaces from a list

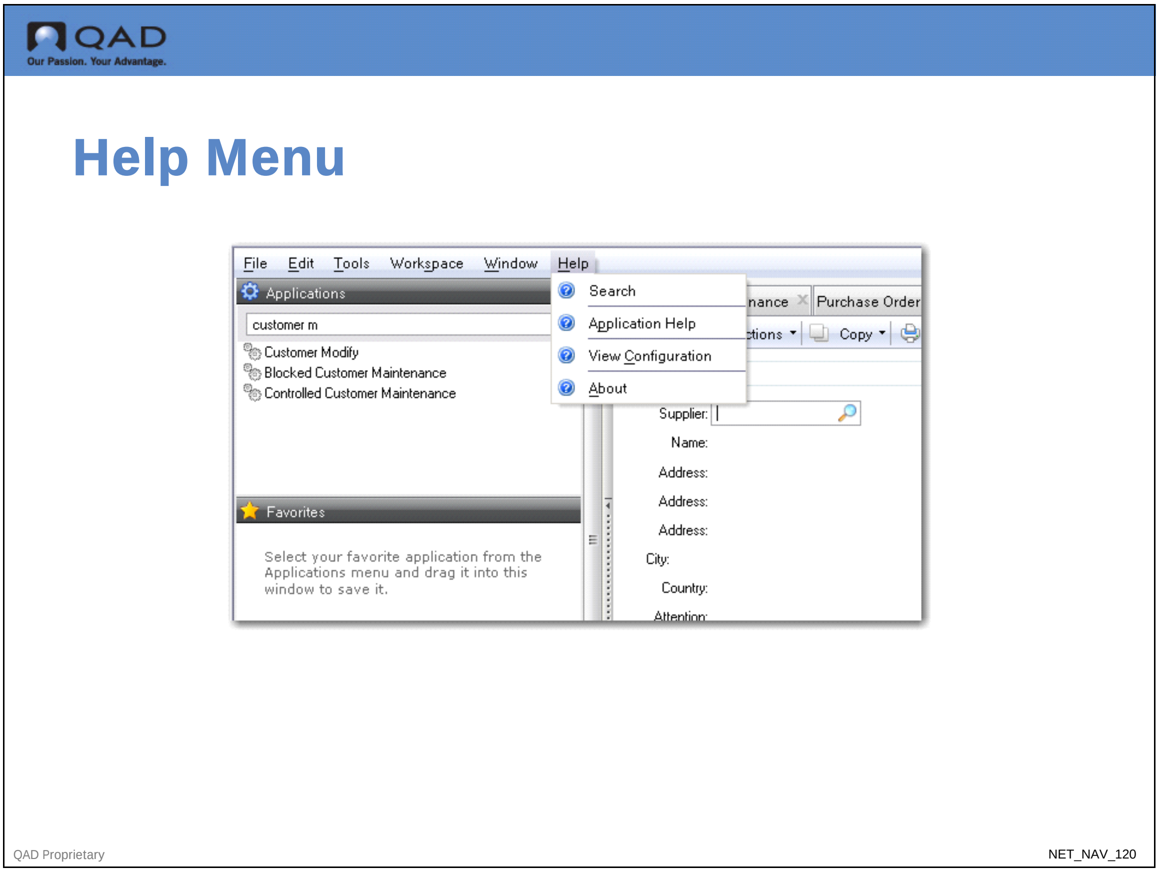
- A workspace typically represents a domain. When you exit the QAD NET UI, the active workspace is saved and displays when you log in again.This allows you to change domains by selecting from the list. The check mark signifies the domain that is currently active. You can also change your workspace from the Workspace Selector along the bottom of the QAD NET UI window. In The SE edition you login to the default domain as defined in user maintenance.

Window Menu



This menu displays the programs in the order in which they were opened. Close all windows shuts all screens on the workspace.

Help Menu



Use the Help menu to display Application and Program Help, and to view installation and application configuration details.

The Help menu commands include:

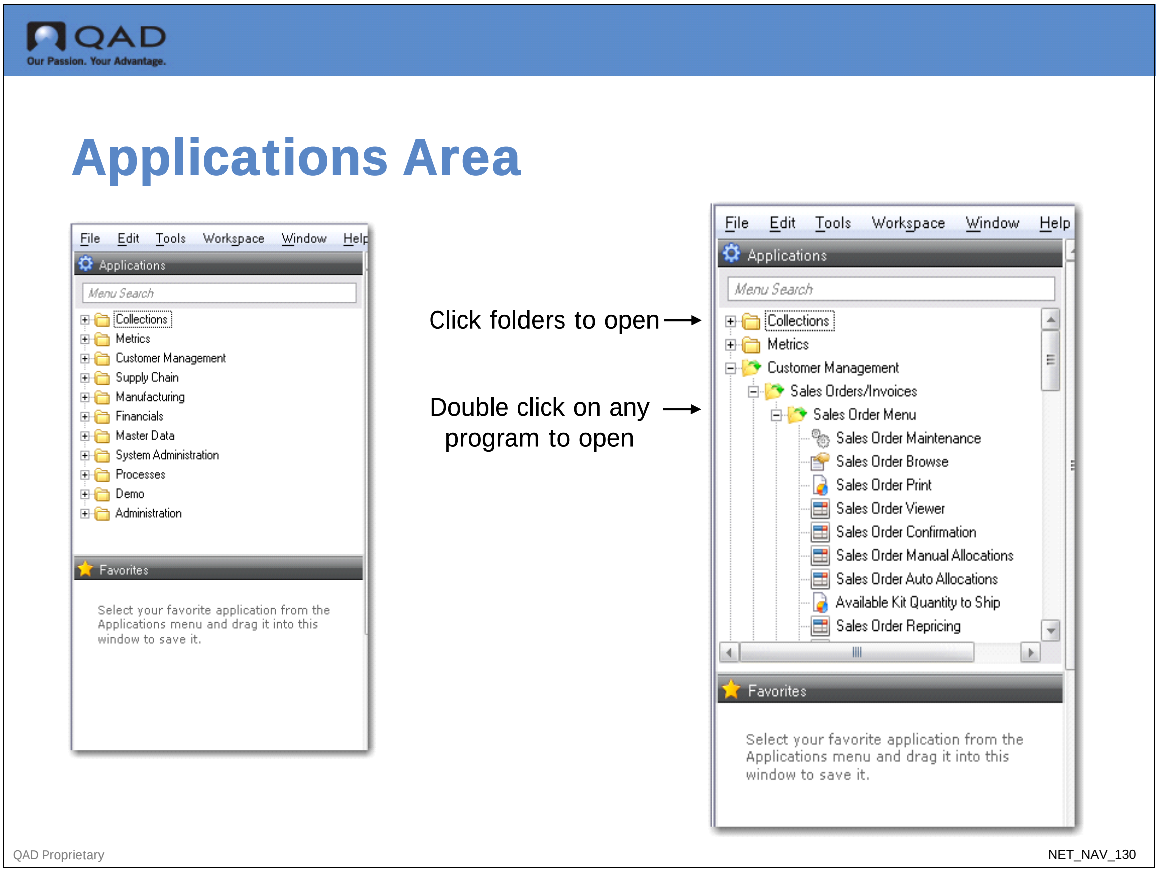
Search. This option displays the QAD Assist default search page.

Application Help. This option is available when your cursor is placed within a non-component based field or screen. When you then select Application Help, field or procedure help is displayed for the field or screen.

View Configuration. Opens a window that displays various configuration settings that cannot be directly changed by a user of the QAD .NET UI. These settings must be changed by a system administrator.

About. Display information about the version of QAD .NET UI that is running, the time the QAD .NET UI was started, and the total amount of physical memory the QAD .NET UI is using. (If N/A is displayed, the operating system is not giving the QAD .NET UI permission to access system information.)

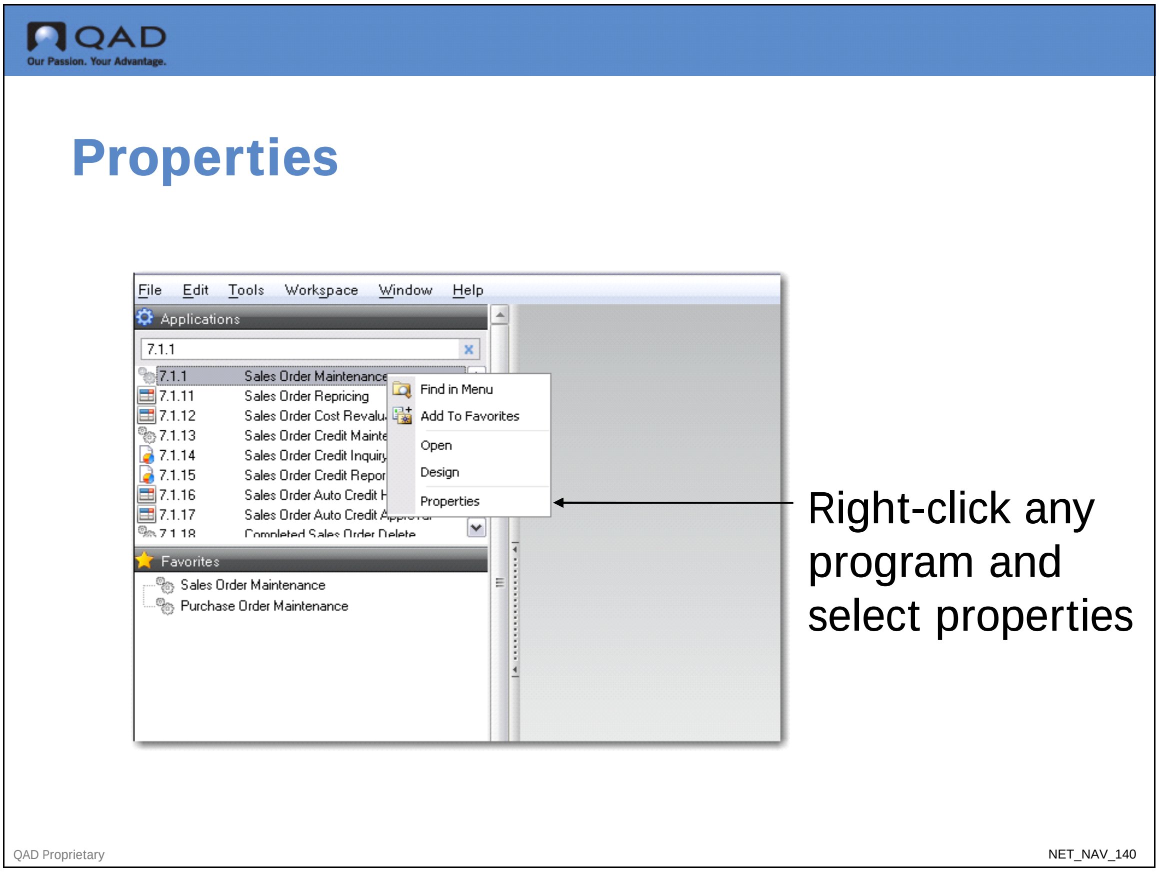
Applications Area



The Applications area displays the menu items for the QAD applications running in the QAD NET UI. When the system is installed, the default menu organization is automatically loaded. Multiple screens can be open at any one time Menu Search

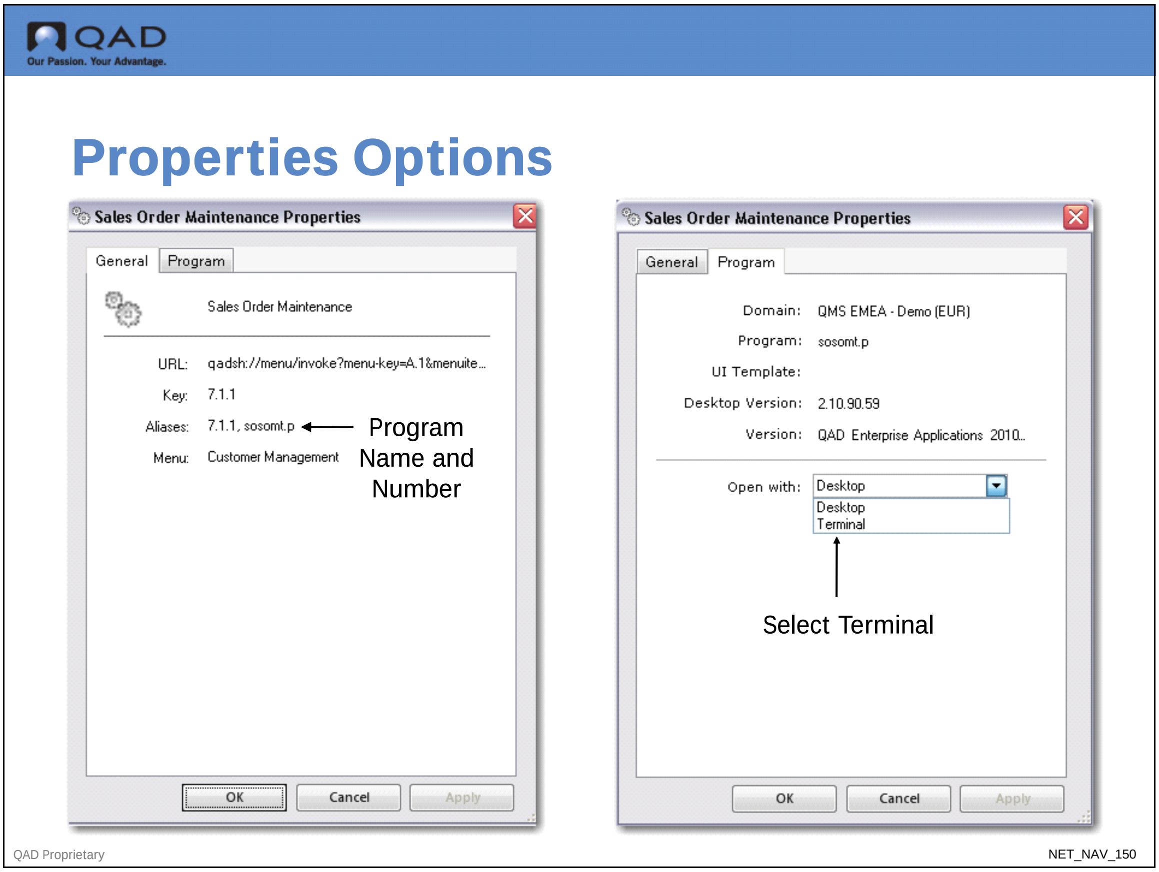
- Find programs based on one or more menu label keywords, program name, or menu number. For example, enter sales to display all menu labels that include the word sales.
- Execute a specific program based on full menu label, program name, or menu number. For example, enter Item Master Maintenance, ppptmt.p, or 1.4.1 and then press Enter to display Item Master Maintenance.
- Execute a specific program based on a shortcut defined in the Name field of Menu System Maintenance.
- When typing in the menu search area different sceens appear as the typing continues untill the proper screen is located. This is called predictive text.

Program Properties



The Properties window includes two tabs, General and Program.

Properties Options



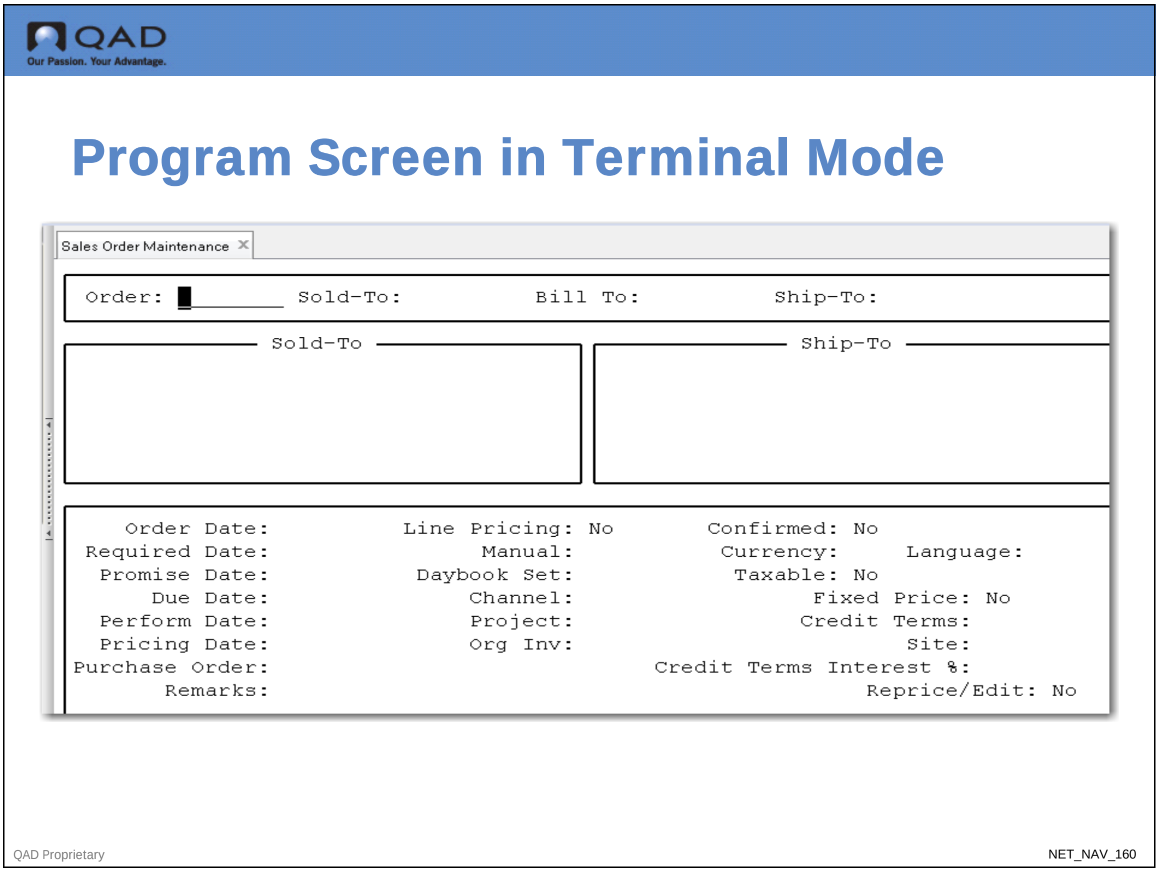
General:

- URL. The QAD Shell URL for the program.
- Key. The program number. For example, 7.1.1 is the program number for Sales Order Maintenance.
- Aliases. The program number and name. For example, for Sales Order Maintenance, 7.1.1 is the program number and `sosomt.p` is the program name.
- Menu. The menu item folder location.

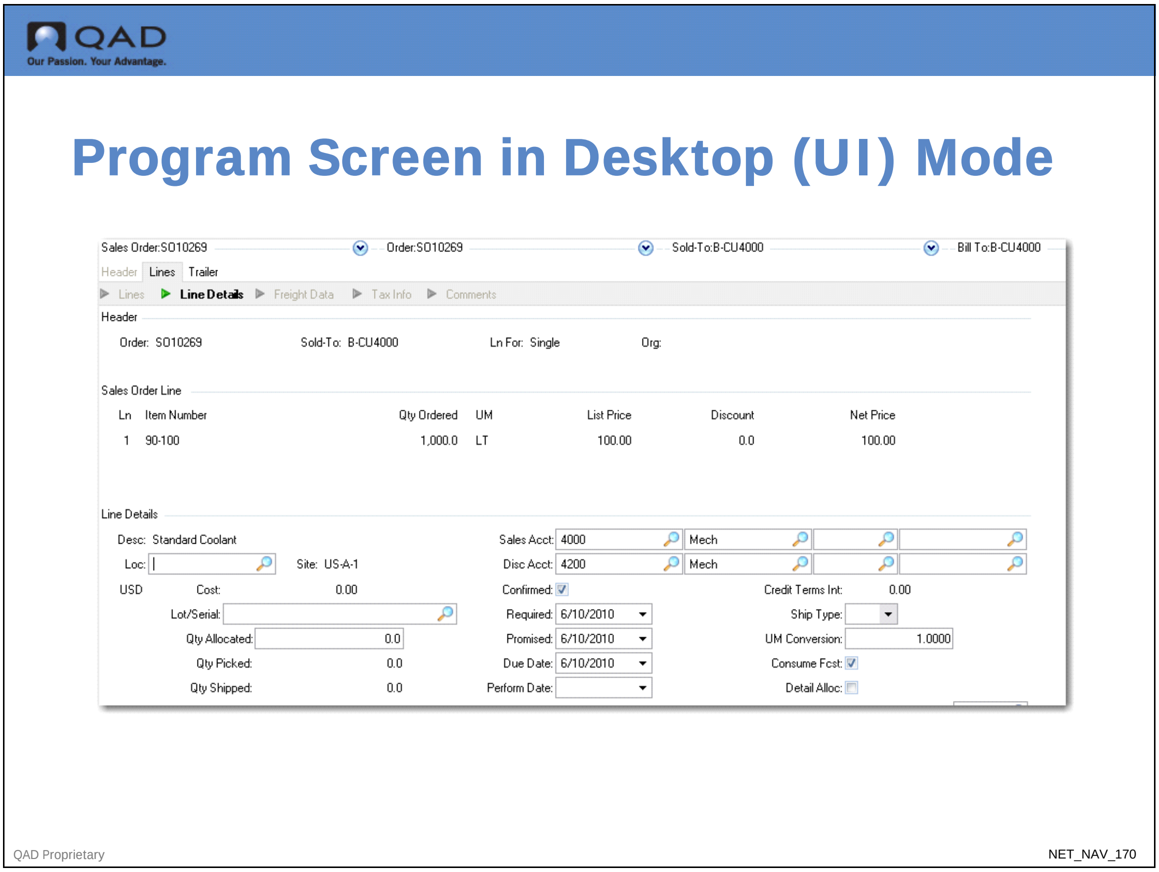
Program:

- Domain. The current working domain and domain currency. If the specific program updates data that applies to all domains.
- Program. The program name. For example, `sosomt.p` is the program name for Sales Order Maintenance.
- UI Template. If the user executing the program has been assigned a Configurable Screens version of the program, the name of the assigned UI template displays.
- Desktop Version. Version details for Desktop.
- Version. Product system version details.
- Open with. Desktop or Terminal.

Program Screen in Terminal Mode



Program Screen in Desktop (UI) Mode



Here we contrast the QAD .NET UI with the more traditional Terminal version in the prior screen. Use point and click, tab, Next, Back or Header, Lines and Trailer Tab to navigate in the non-component based QAD.NET UI.

Favorites

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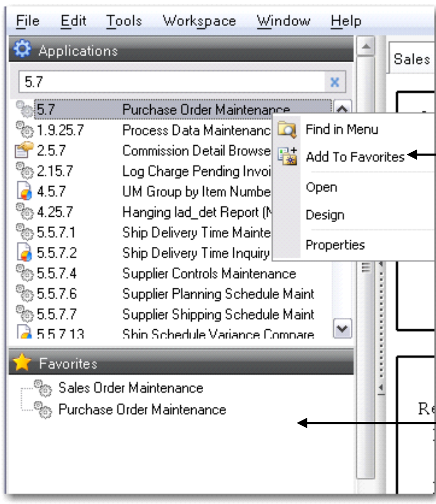
Favorites



Right-click a program and select Add to Favorites, or drag and drop programs to the Favorites area

Programs that are used frequently so that a search is not required

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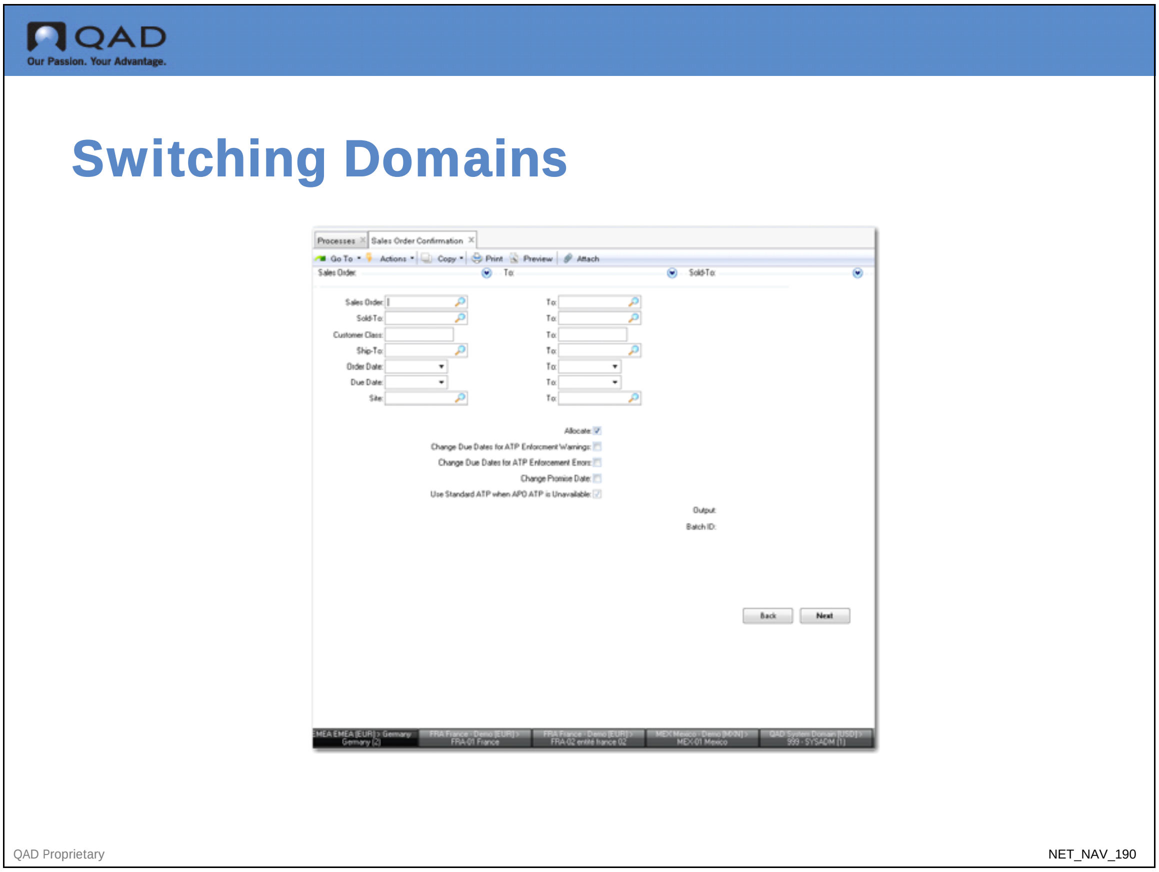
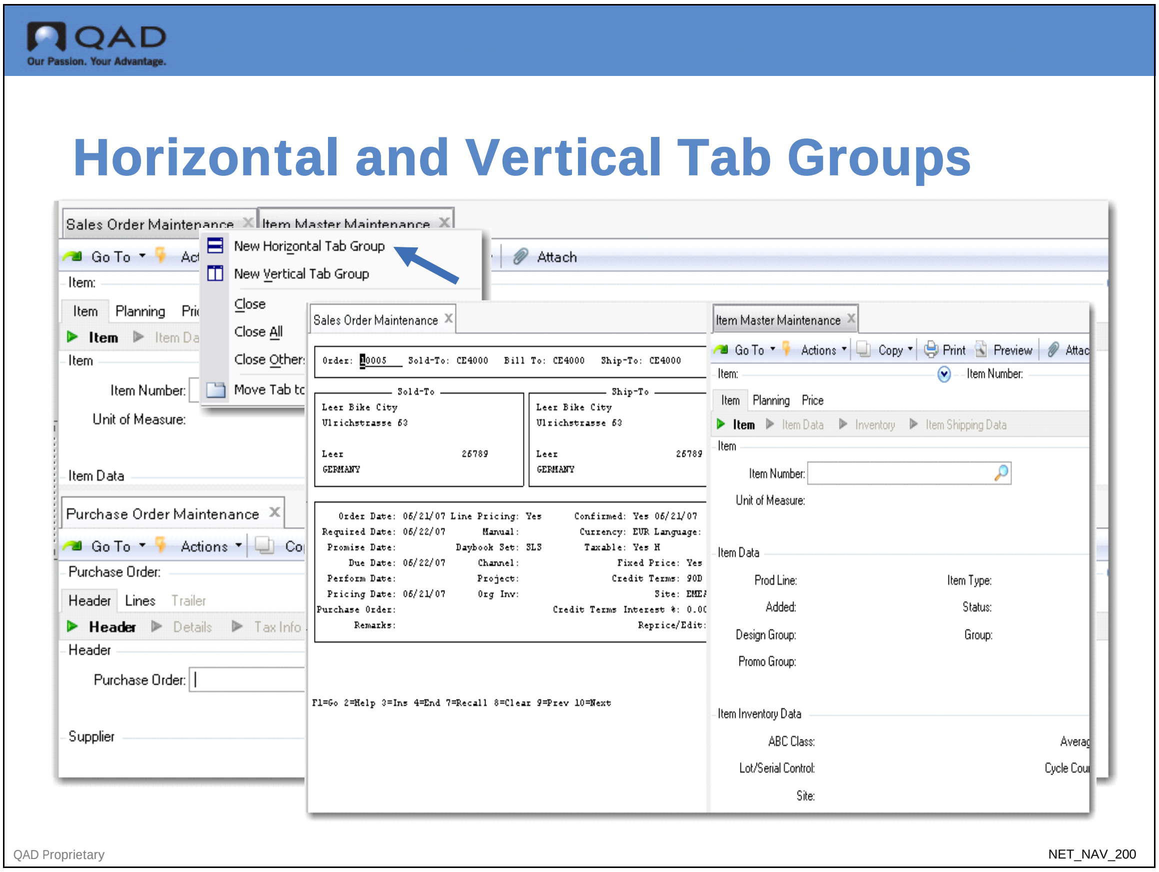
Switching Domains



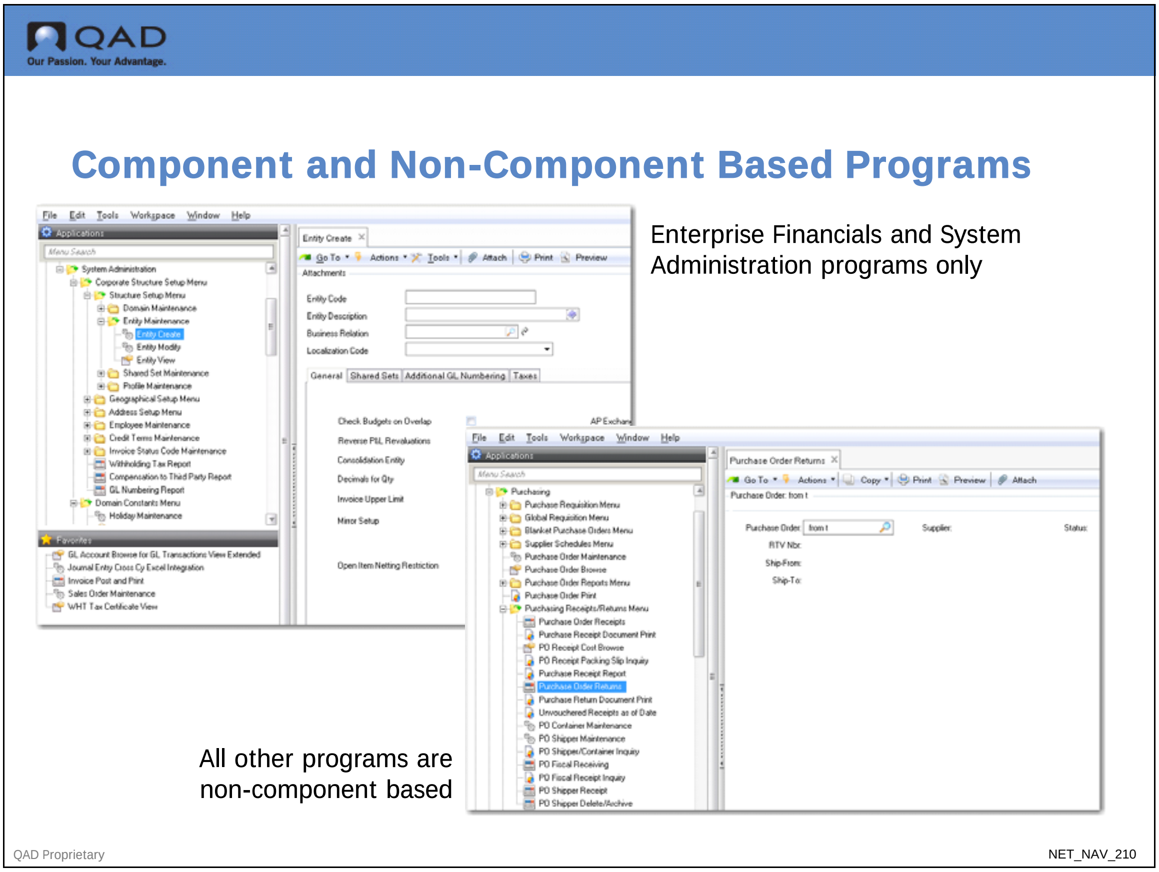
With the workspace selector toolbar along the bottom of the screen, you can quickly change workspaces and domains.

Horizontal and Vertical View Tab Groups



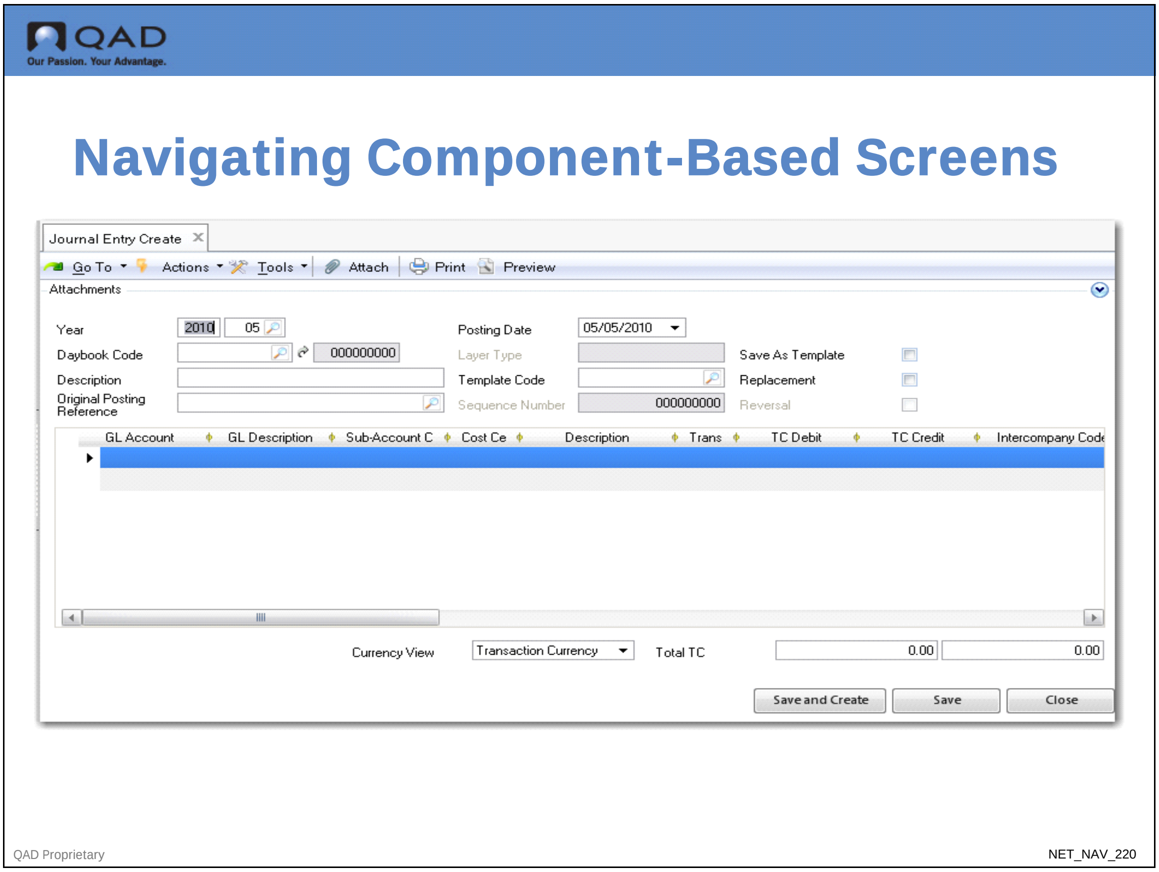
Horizontal and Vertical Tab Groups. There are two methods or views of making multiple screens appear on the desktop. This works especially well with the .NET UI browse programs.

Component and Non-Component Based Programs



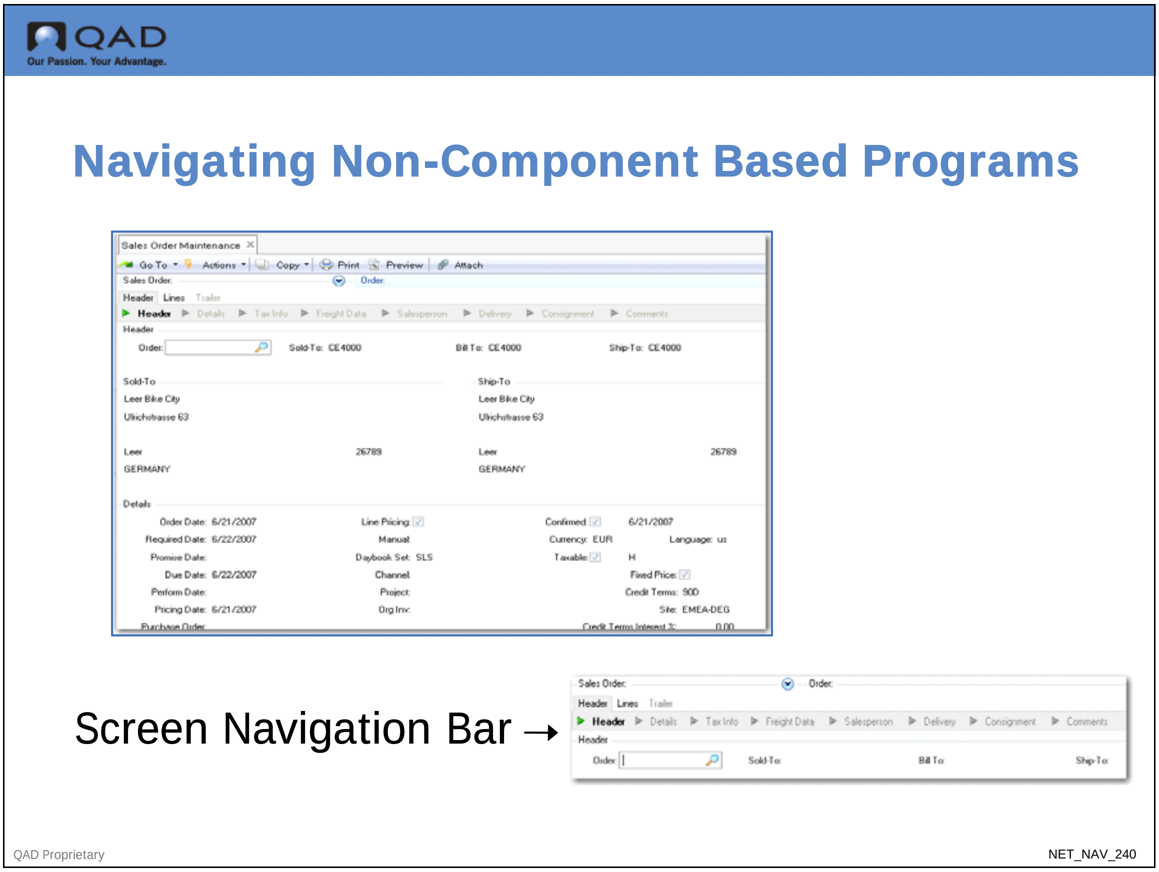
Only Enterprise Edition Financials and some System Administration programs are component-based. All other applications are non-component based, including Standard Edition Financials. Component-based programs have individual maintenance programs, such as Create, Modify, and Delete.

Navigating Component-Based Screens



Because the component-based UI is based on Microsoft .NET technology, it incorporates familiar mouse, click and drag, and tabbing functions.

Navigating Non-Component Based Screens

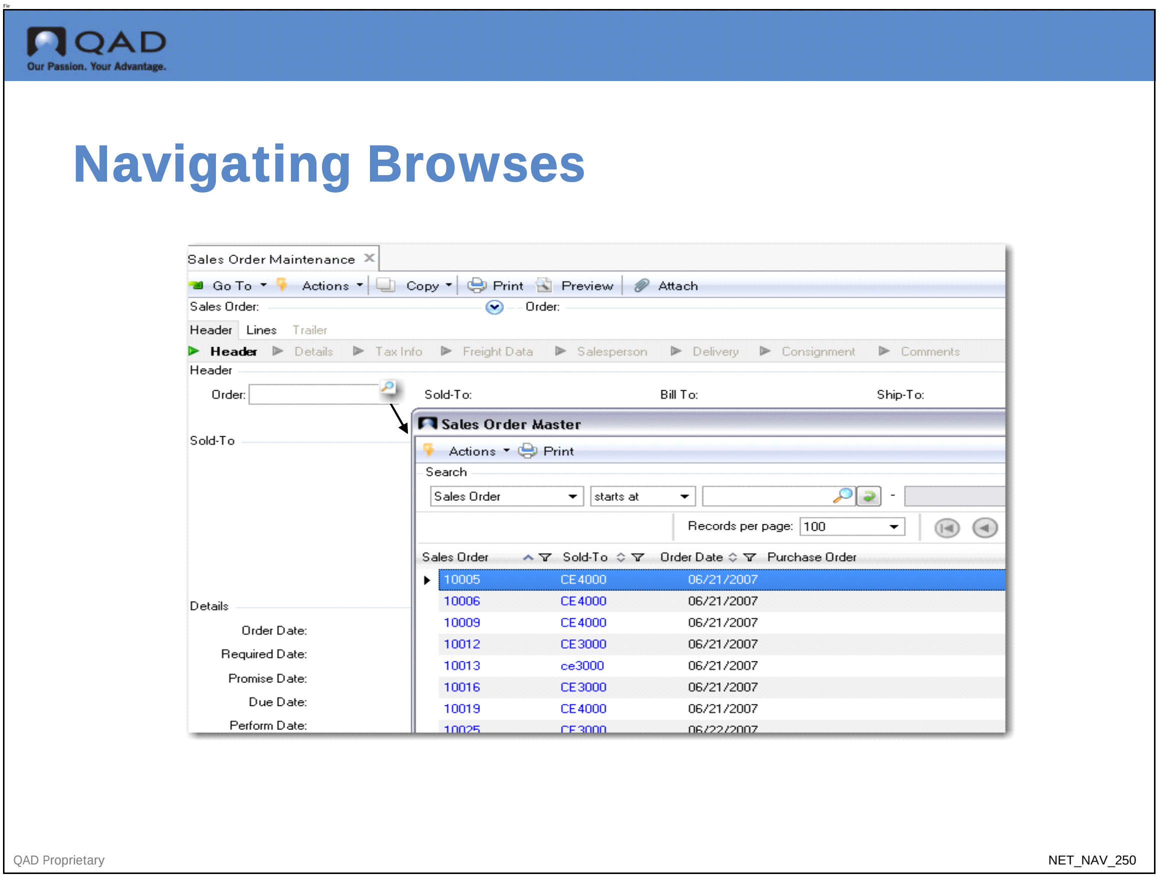


Because non-component based screens are a rendering of the character UI, you can navigate these screens using the same keyboard commands. You can also use mouse clicks to select fields and enter data.

If the program opens in .NET UI mode, a navigation bar is displayed along the top of the screen indicating where you are as you proceed through the program screens. For example, the screen for Purchase Order Maintenance includes a navigation bar indicating the parts of a purchase order: Header, Tax Info, Lines, and Trailer.

The Screen Navigation Bar option in the Desktop section of the Options menu (choose Tools| Options) specifies whether your QAD .NET UI client displays the navigation tool.

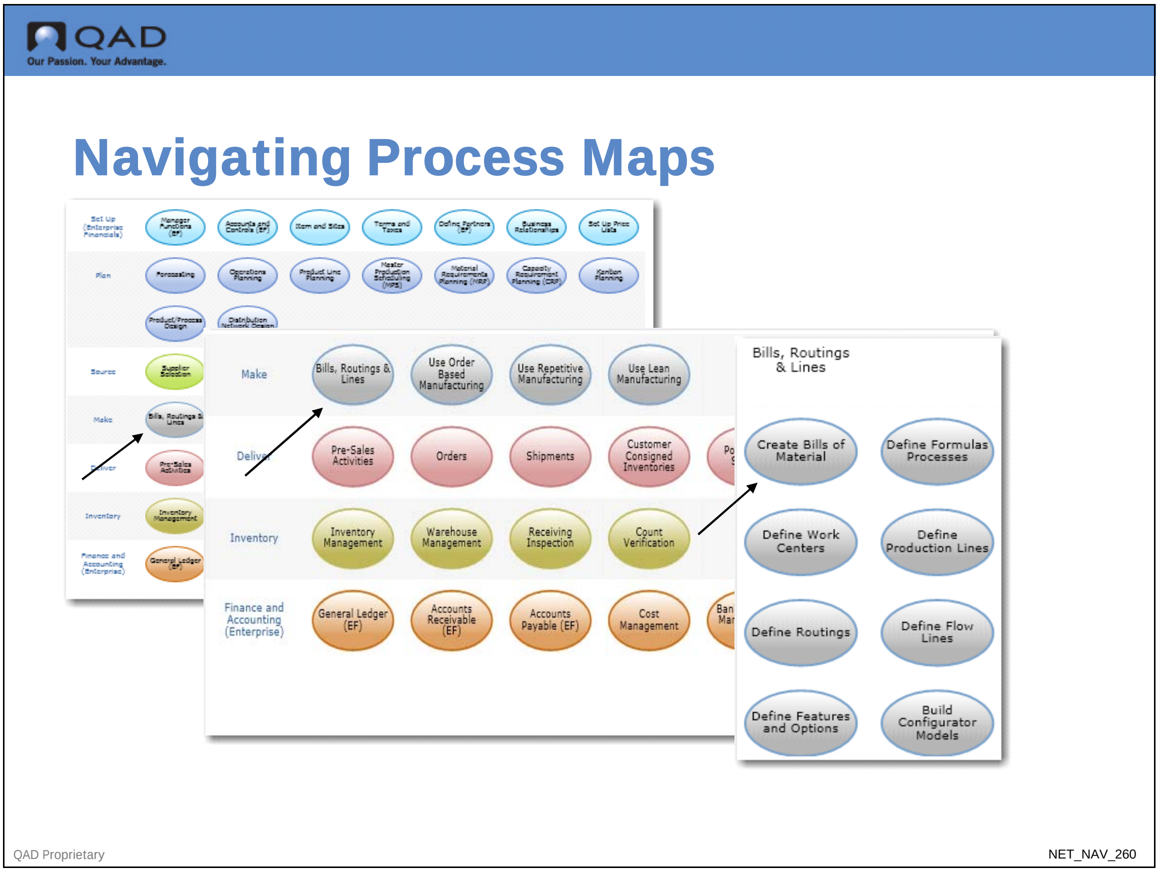
Navigating Browses



Many fields display a small magnifying glass icon. This indicates that a lookup is associated with the field. Click the icon or use the Alt+L keyboard shortcut to display the lookup. The lookup lists valid values for the field.

A drop-down list is displayed when only a few values apply to a field.

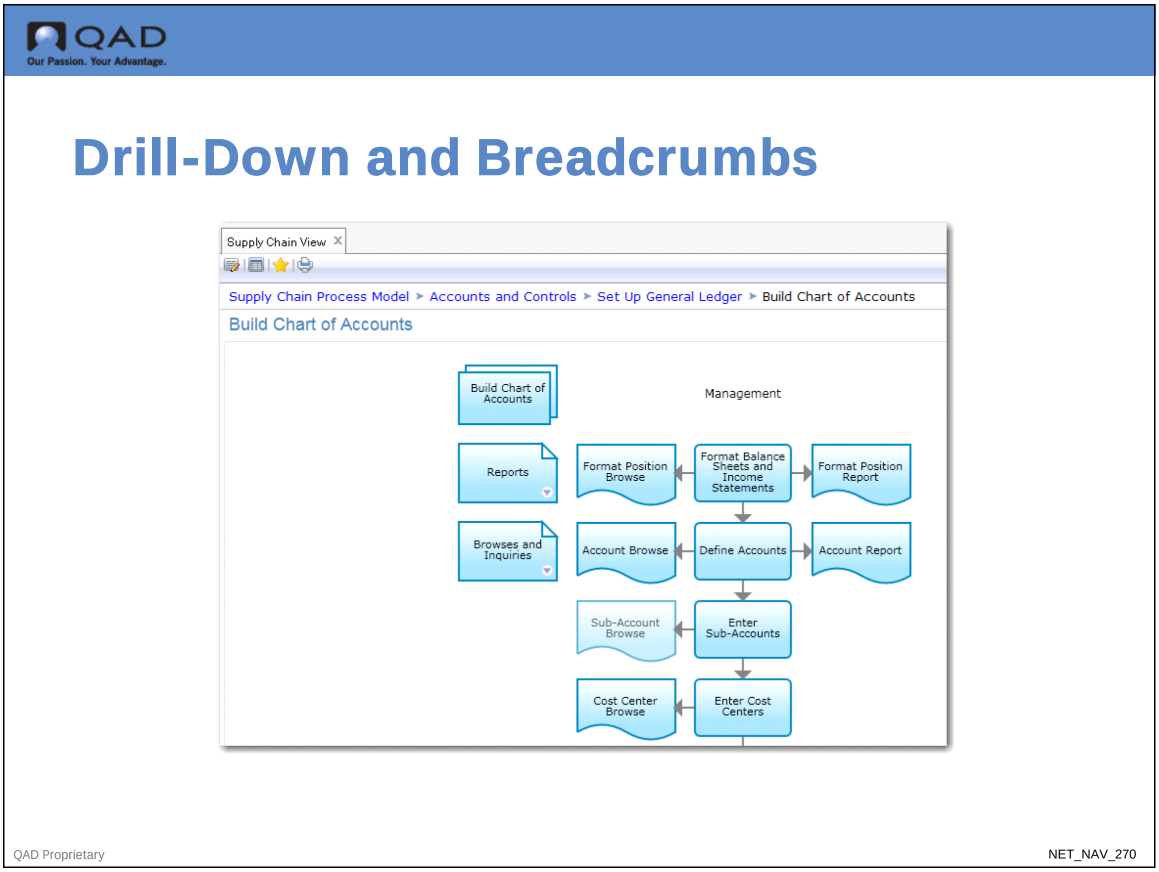
Navigating Process Maps



Processes, or process maps, are graphical models of workflows that link to programs, browses, and other process maps using advanced features of .NET technology.

Process map nodes provide drill-down navigation to individual programs within process flows.

Drill-Down and Breadcrumbs



Processes are built with two basic components:

- Nodes are represented by various shapes and typically indicate a step within the process.
- Connectors are lines with arrows that indicate the direction of execution for the steps (nodes) within the process.

You navigate the process map using nodes, and can re-trace your steps using the hyperlinked breadcrumbs at the top of the screen.

Summary

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Summary

- You can display some non-component based programs in terminal or .NET UI mode
- Component-based programs display in .NET UI mode only
- A screen navigation bar is available for some programs
- Process maps let you drill-down on process flows

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Exercise and Knowledge Check

1 The Screen Navigation Bar for non-component based programs is enabled in which menu option?

2 How do you navigate between domains?

3 Which is the only component-based application in QAD Enterprise Applications?

4 How do you display the program linked to a process map node?

5 Open up a Sales Order Menu screen by navigating through the folders. Which three folders did you open to get to the Sales Order Maintenance screen?

6 Open up Purchase Order Maintenance Screen using the menu search.

7 Open up Sales Order Browse by entering `sobr009.p` in the menu search field. What is the screen number?

8 Open up Sales Order Maintenance in terminal mode.

9 Display the lookup browse for the first field of Purchase Order Maintenance. What is the name of the master file used or name of the browse?

Chapter 3

Help in the QAD .NET UI

Objective

Objective

- Introduce the student to the extensive help capabilities of the QAD .NET UI.
  - Character UI Help
  - QAD .NET UI Help
  - QAD Assist
  - QAD Guide Me

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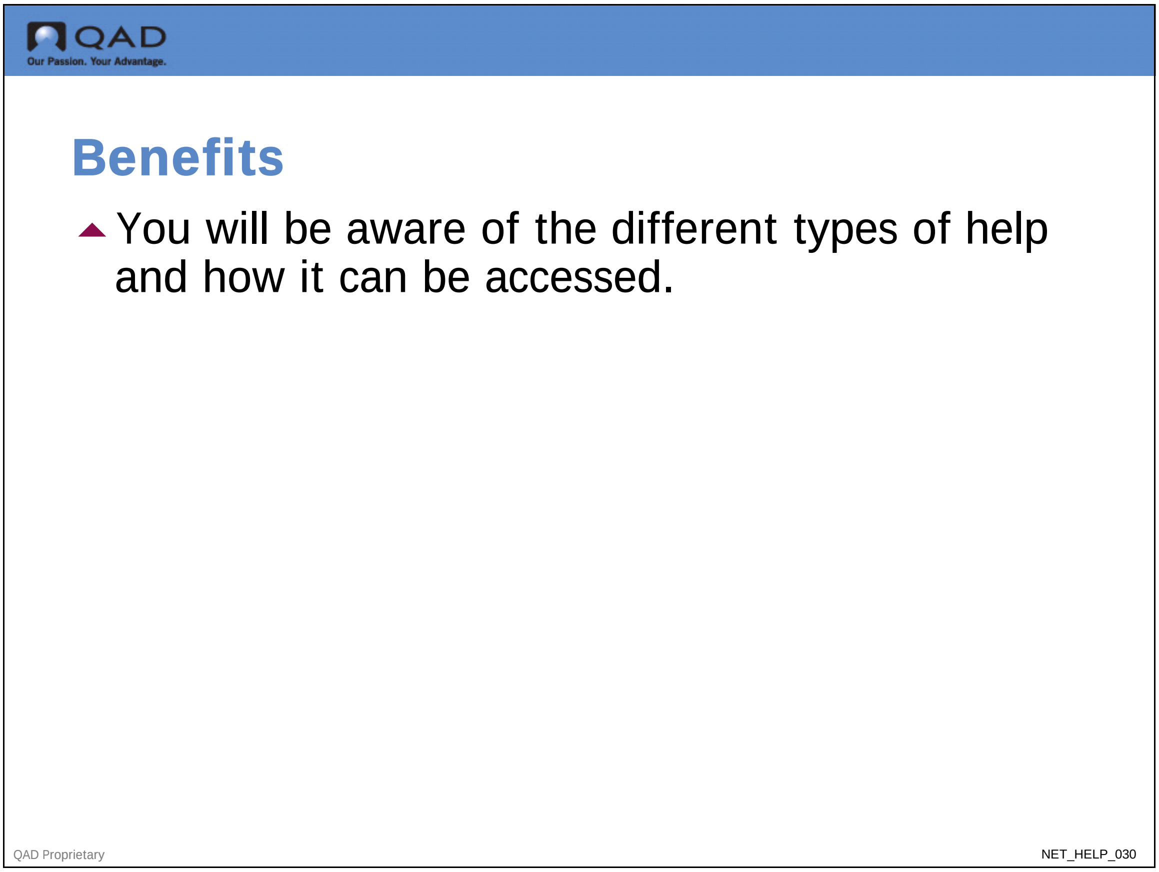
Benefits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You will be aware of the different types of help and how it can be accessed.
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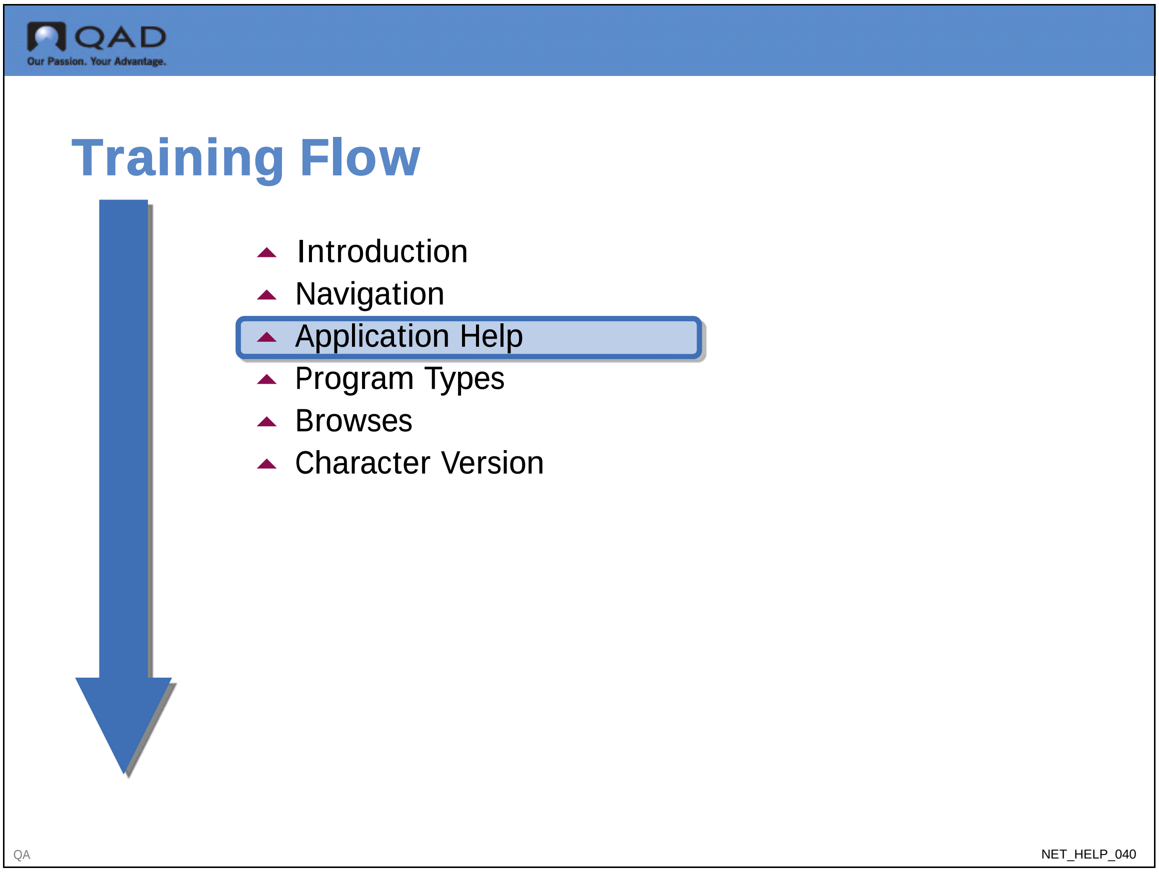
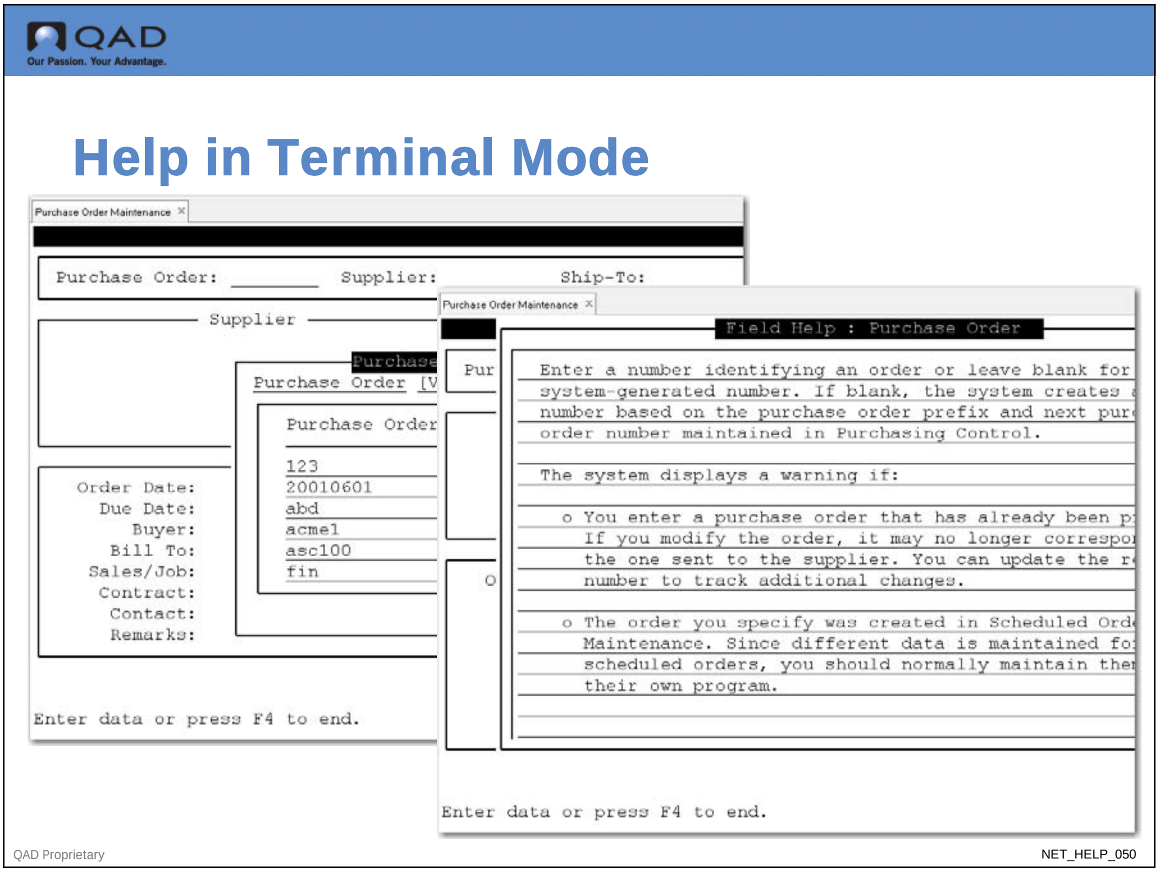
Training Flow



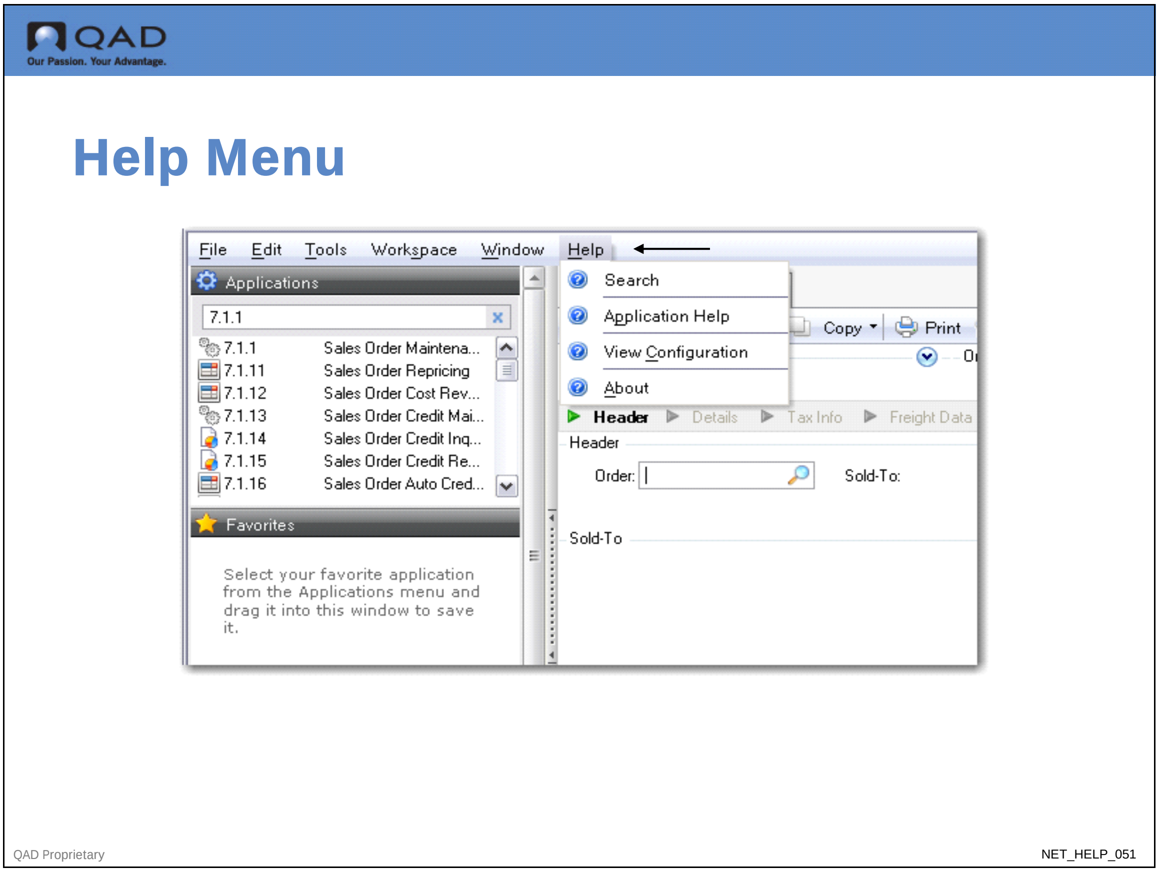
Help in Terminal Mode



Help

- The first time you press F2, a lookup browse displays if one is attached. If not, field help displays first. Use lookup browses to view records available to specified fields. You can choose a record to enter in the field. If you enter a value and press Enter, the list in the bottom of the browse frame scrolls to the first record that matches that value. Use the arrow keys to scroll through the list, then select the record by pressing Enter.
- Press F2 again to display field help. It describes a specific field and how it is used in the program. Most updateable fields have field help. Display-only fields do not.
- Press F2 again to display procedure help. It describes the program and how it is used in the module. Procedure help is not generally provided for reports, inquiries, browses, or control programs.

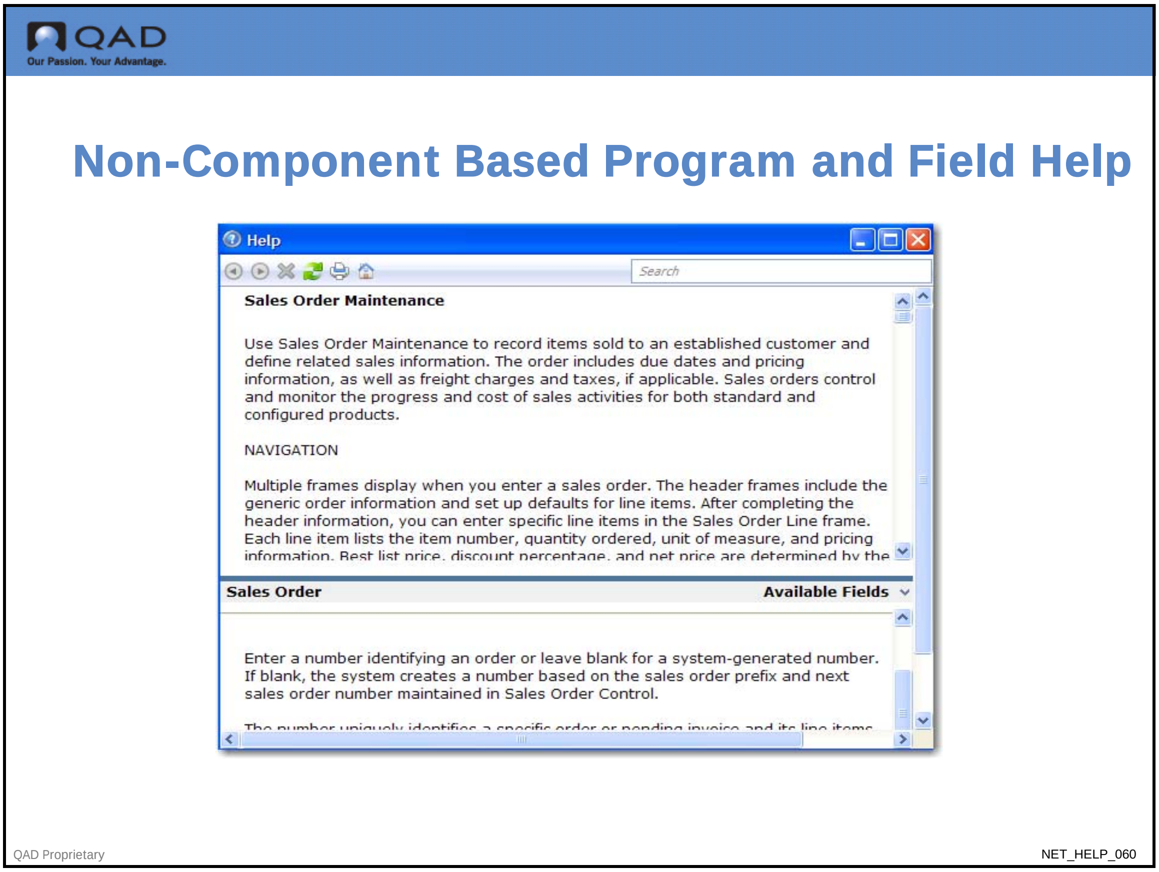
Help Menu



Help

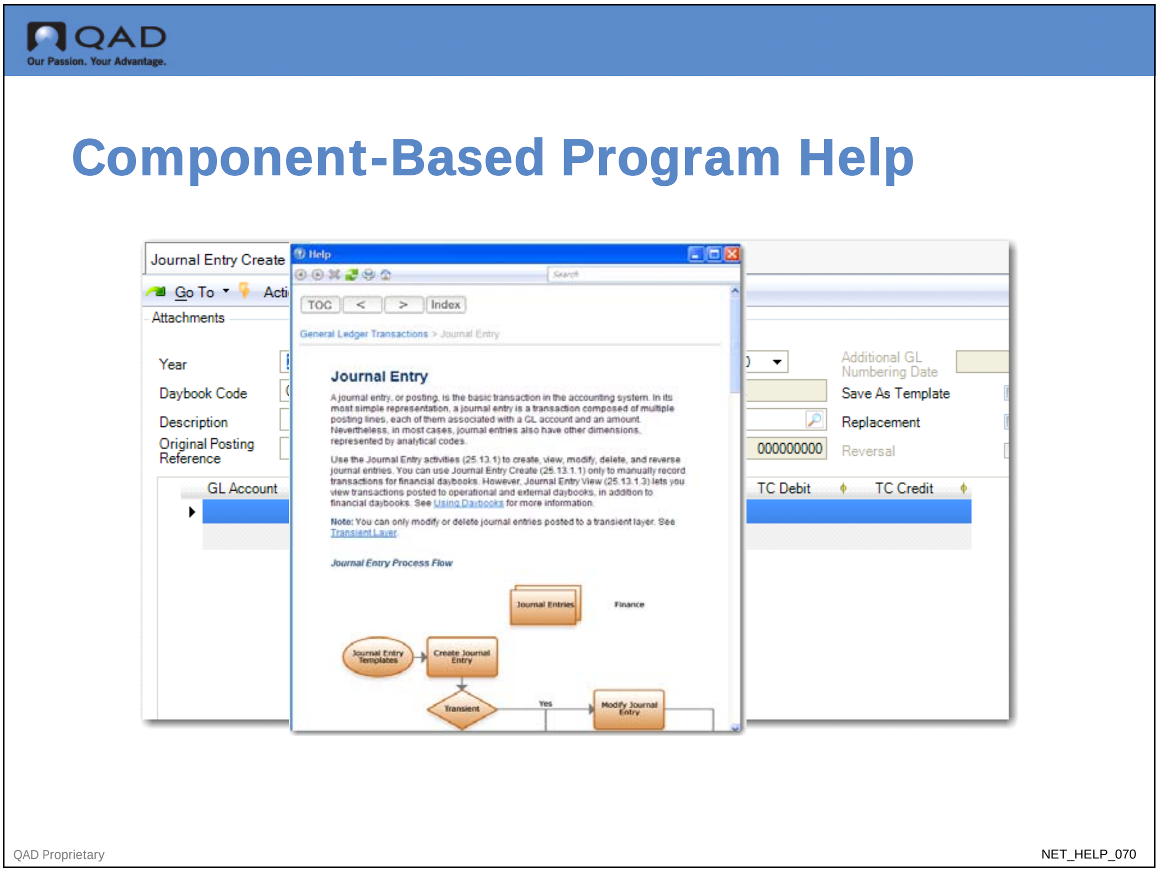
- Search. The Assistance Panel is available by selecting Search.
- Application Help. This option is available when your cursor is placed within a non-component based field or screen. When you then select Application Help, field or procedure help is displayed for the field or screen.
- View Configuration. Opens a window that displays various configuration settings that cannot be directly changed by a user of the QAD .NET UI. These settings must be changed by a system administrator.
- About. Display information about the version of QAD .NET UI that is running, the time the QAD .NET UI was started, and the total amount of physical memory the QAD .NET UI is using.

Non-Component Program and Field Help



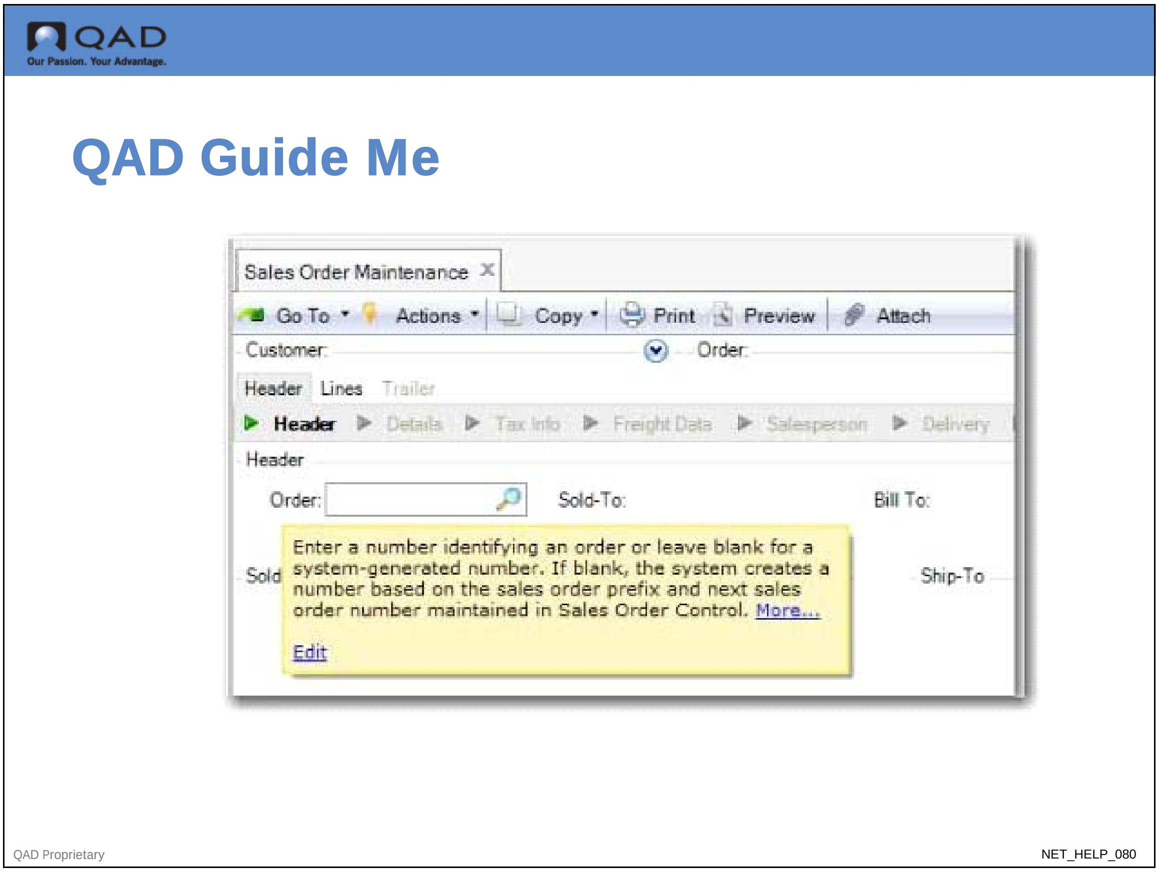
Press F1 or select menu bar help and program help will appear on the top of the page and field help on the bottom.

Component Based Help



When you select help within a component-based screen, the system displays a context-sensitive help topic for that screen within the QAD Assistance Panel.

QAD Guide Me

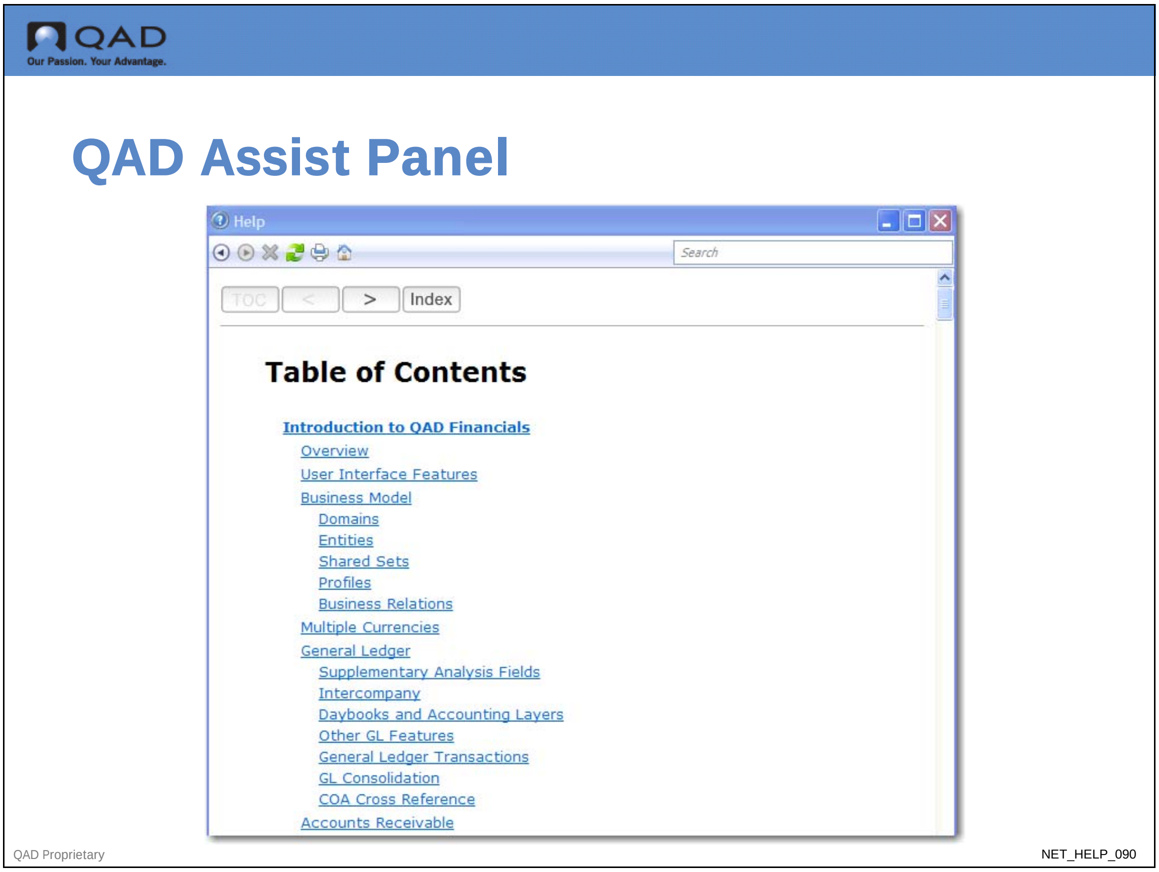


The QAD Guide Me feature provides immediate mouse-over descriptions of fields in both component and non-component programs. The feature is disabled by default.

Note Field help for non-component based programs is also displayed by pressing the F1 key when the cursor is positioned in the field. Click the More... link to display an extended description of the field, and the Edit link to edit this description in Field Help Maintenance.

Note The Edit option is only visible for users who have access to Field Help Maintenance.

QAD Assist Panel



QAD Assist Panel

The QAD Assistance Panel provides online Help for the .NET UI and for Enterprise Edition applications. Assistance replaces the previous .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. The Panel features links to program help, field help, user guides, and process maps. You can display results for the search entry in any of these formats or in all of them.

QAD Assist

Single Terms and Phrases

You can search for single terms (such as ‘Test’), phrases (such as ‘Work Orders’) 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, -

Summary

Chapter Summary

- Program and field help is available for both component- and non-component based applications.

QAD Proprietary

NET_HELP_110

Exercise and Knowledge Check

1 Launch Purchase Order Maintenance in terminal mode.

  Press F1 in the first field of the purchase order.? What is displayed? Press F1 again. What is displayed this time?

2 Go to the Sales Order Maintenance screen and select Help|Search. What screen is displayed?

3 Do a search on the word Sales. Drill down on Sales analysis. What is displayed?

4 Go to Journal Entry Create and hit F1. What is displayed? Note the differences between a non-component based help and component based help.

Chapter 4

Programs in the QAD .NET UI

Objective

Chapter Objectives

- The objective of this chapter is to describe program types and program features in QAD Enterprise Applications.

QAD Proprietary NET_PRG_020

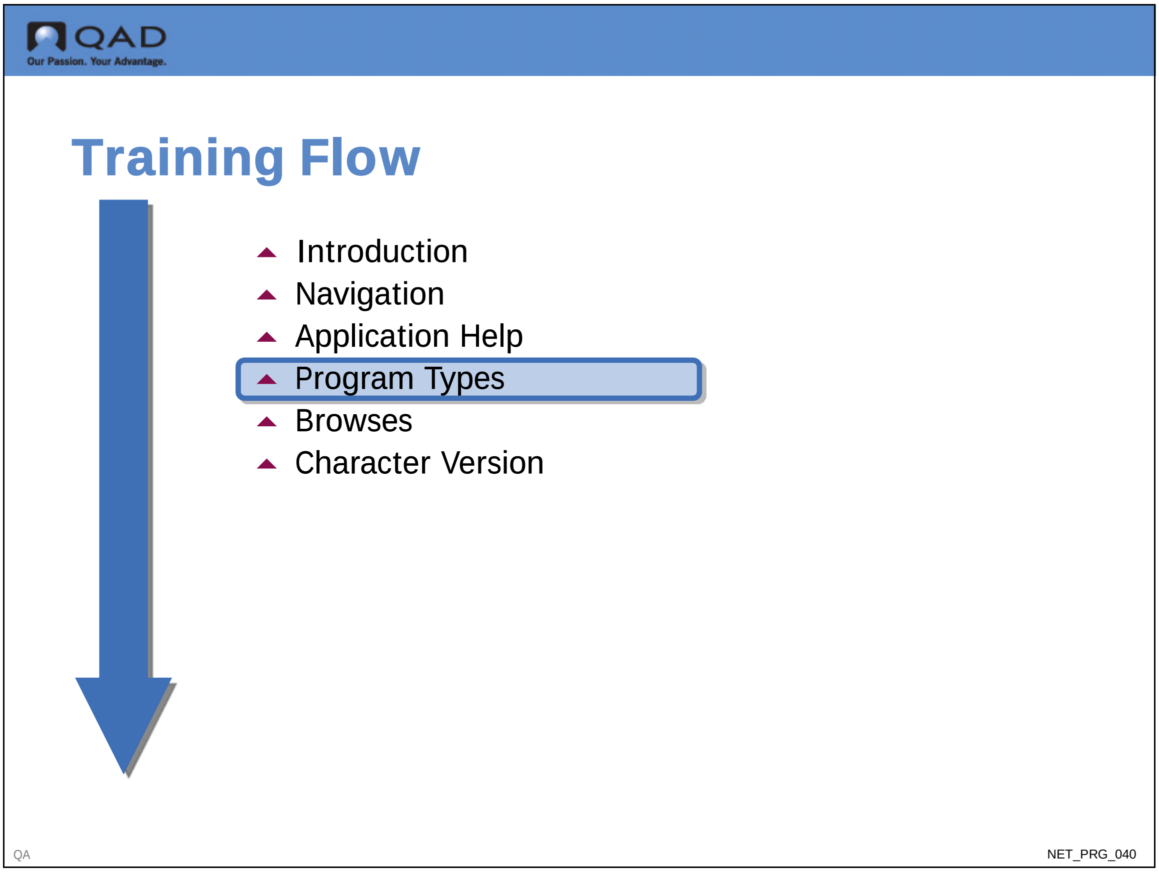
Benefits

Benefits

- You will be able to identify different program types and will be familiar with some basic Enterprise Applications program features.

NET_PRG_030

Training Flow



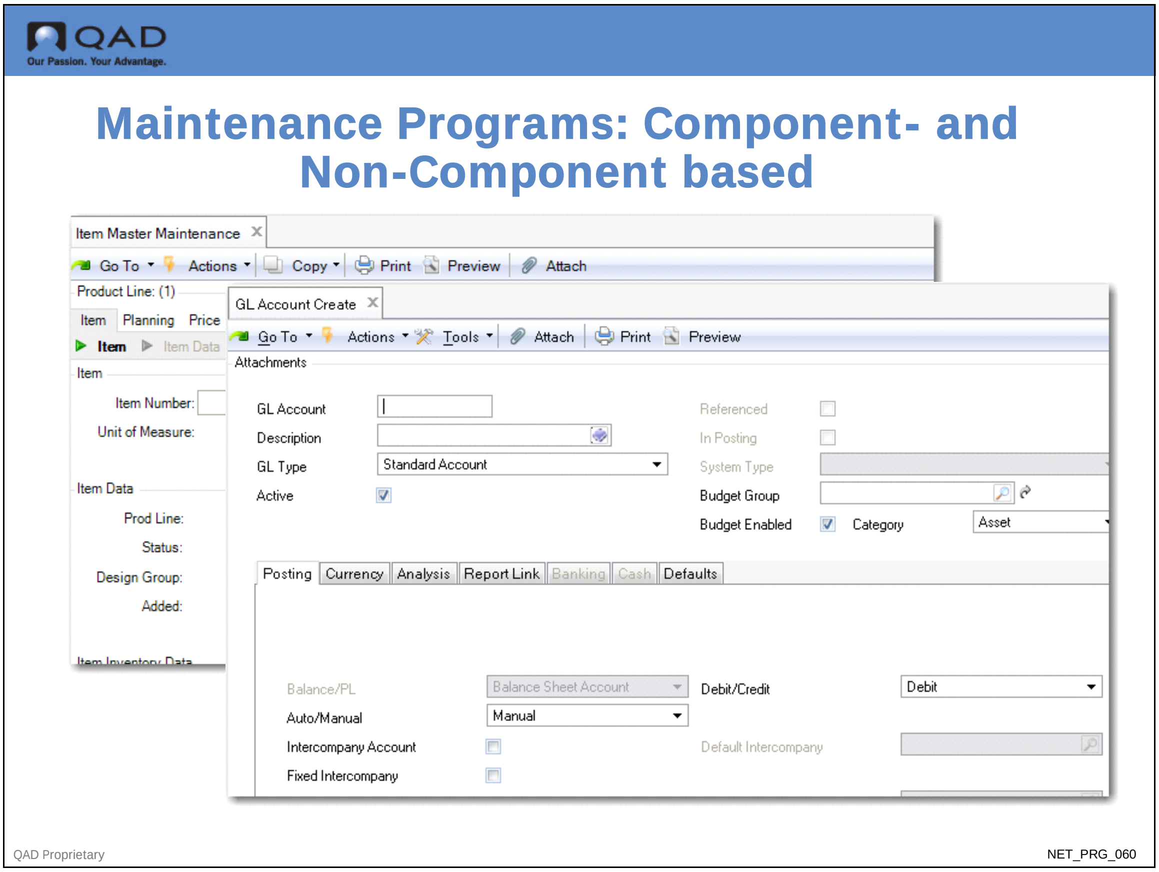
Program Types

Program Types

- Maintenance Programs
- Inquiry and Report programs
- Browse Programs
- Transaction Programs
- Utility Programs and Control programs

QAD Proprietary NET-PRG-050

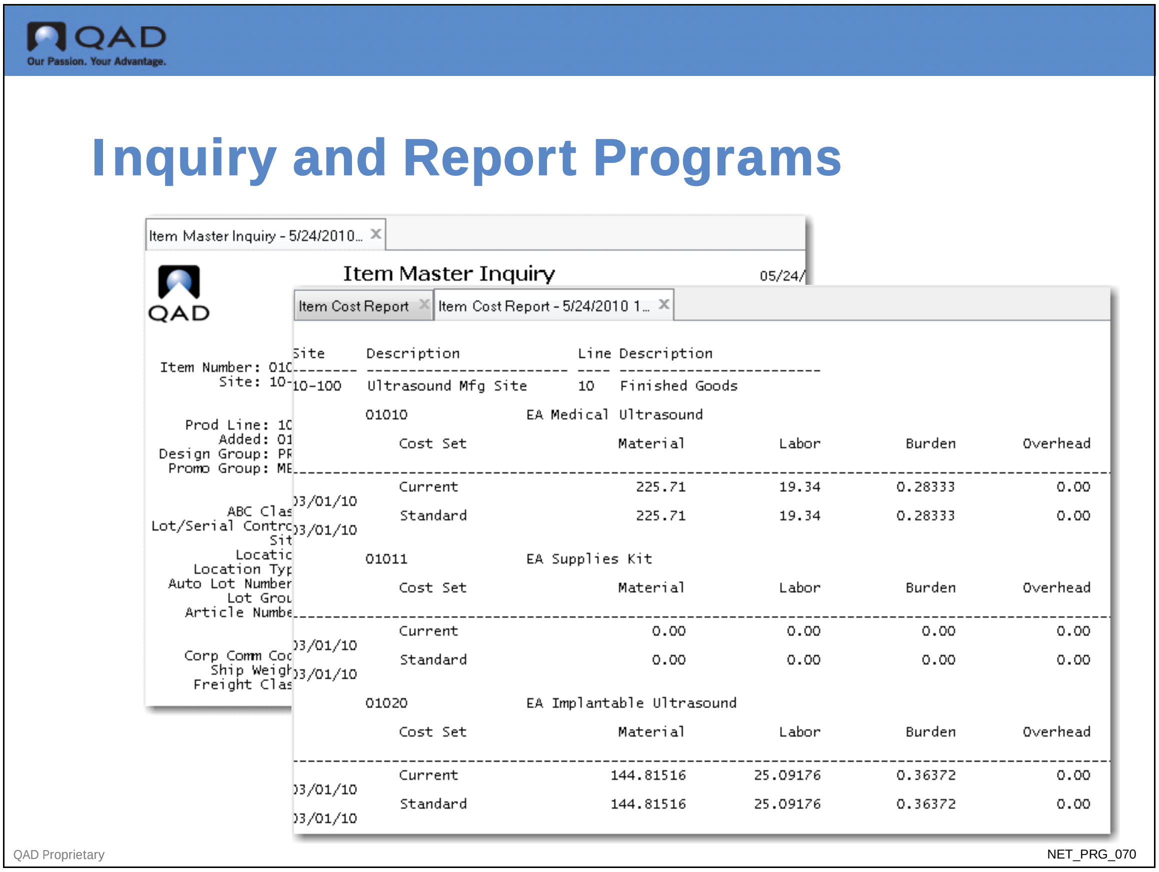
Maintenance Programs



The Item Master Maintenance and GL Account Create Entry are examples of maintenance programs that update the database directly when the record is entered and saved.

In the case of non-component maintenance programs changes to the record will be made in the same maintenance screen, where as in component based maintenance programs changes are made in the Create, Modify, or Delete maintenance screens.

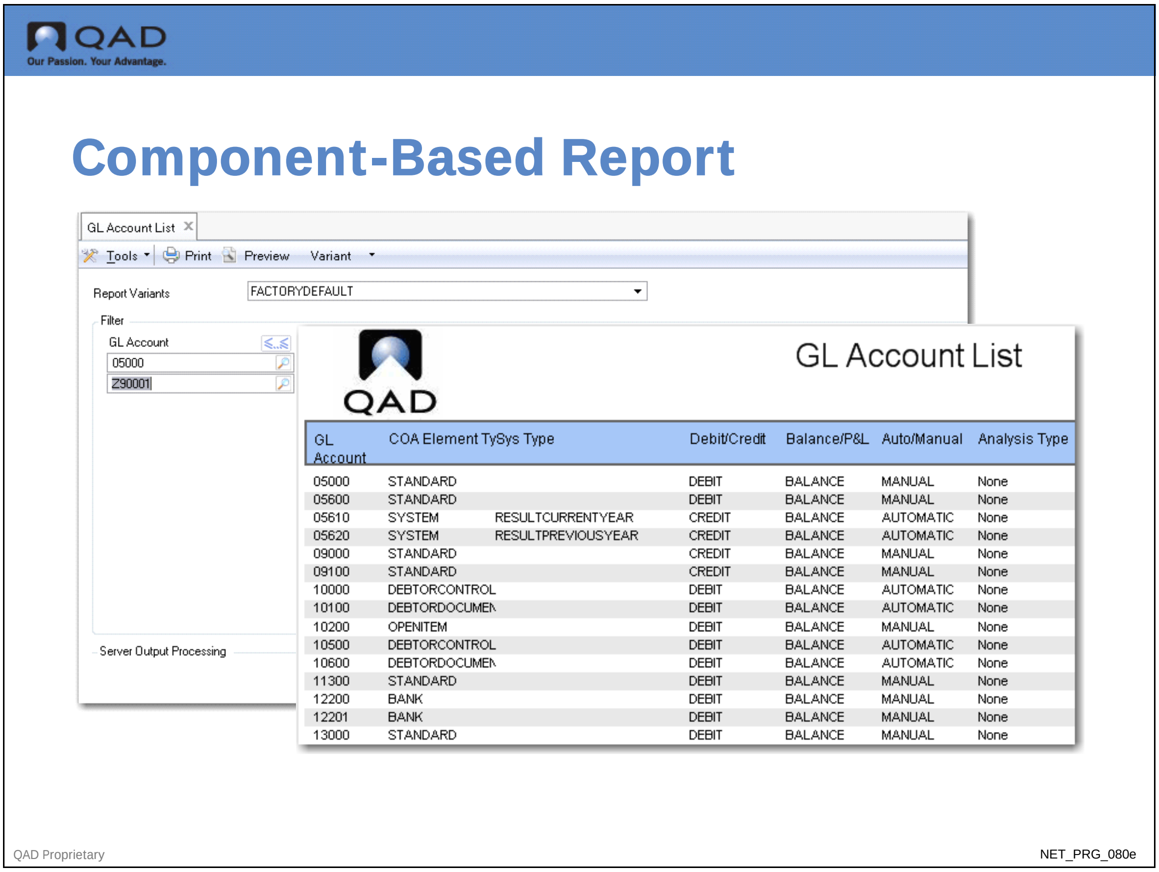
Inquiry and Report Programs



Inquiries and reports retrieve and display operational database records. Inquiries are primarily used to answer specific questions. Reports usually provide more detail and are printed for a range of data records. You select data by entering a specific range of criteria, such as item number or date.

Typically, inquiries are viewed online and reports are sent to a printer or file. However, you can also print inquiries and view reports. In addition, other output options, such as e-mail, are available.

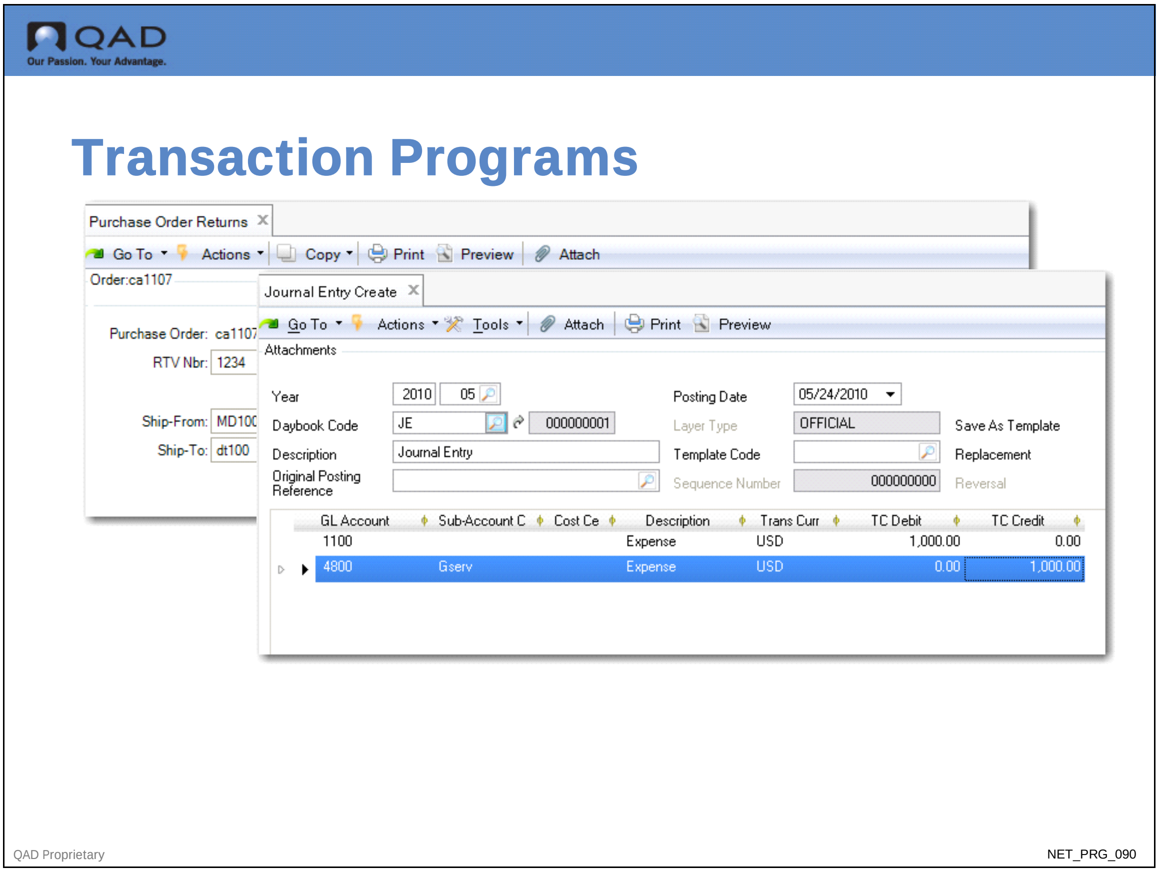
Component-Based Report



Component-based reports have multiple output options, including viewer, printer, and export to PDF, XLS, and DOC standards. The report output is easy to customize, and you can create an extensive set of reports with unlimited report variants for many output types.

You can run a report immediately, or choose to schedule it to run later. In this case, a pop-up window opens to let you enter details for running the report at a later date.

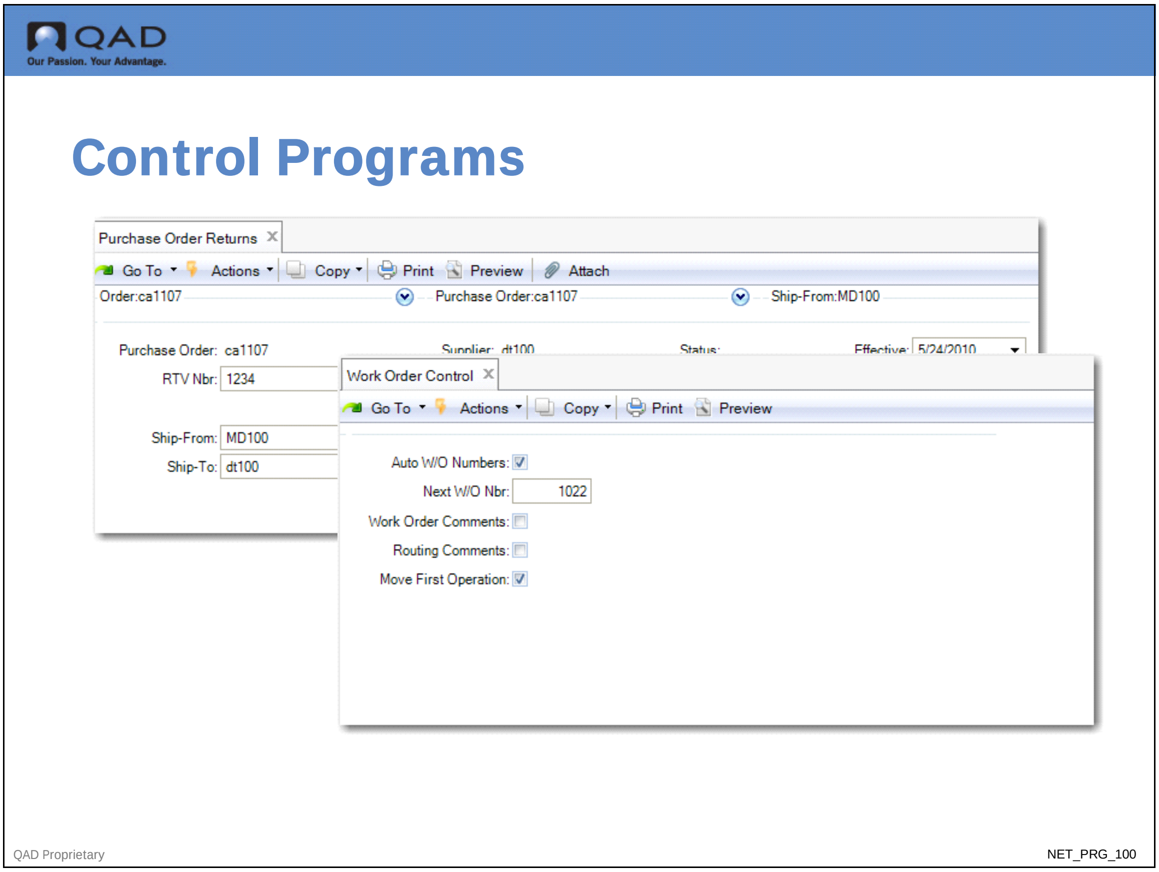
Transaction Programs



Transactions programs control and record activities related to business documents such as sales orders and invoices. An example of a transaction is receipt of a shipment for a purchase order using Purchase Order Receipts or Returns. Enterprise Financials transactions programs include Customer and Supplier Invoice, and Journal Entry.

Most data in the database is transaction data. Every day, sales orders come in, purchase orders go out, and work orders make demands on and create material for inventory. These events result in transactions, which are stored in transaction tables. In contrast to control programs, transaction tables are constantly updated by users of the system.

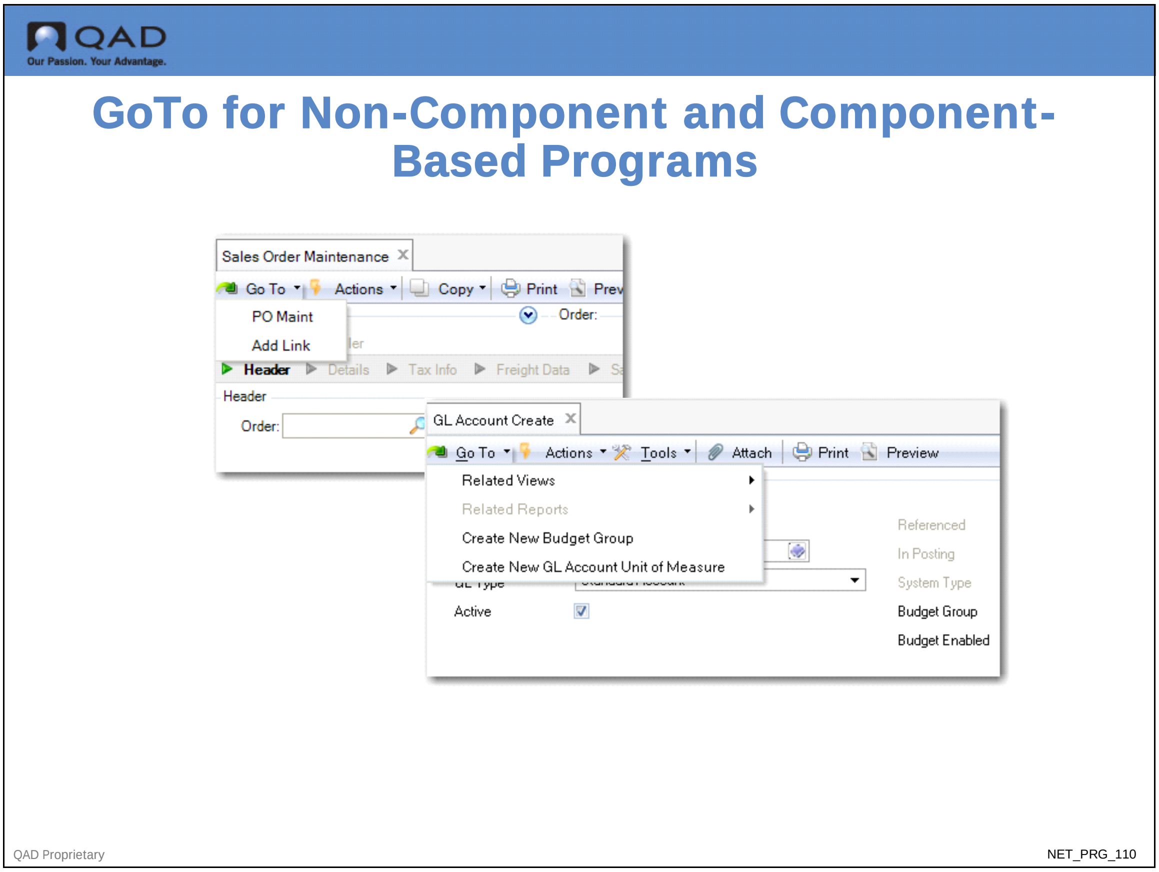
Control Programs



Control Data

When you implement a module, you enter data that the system uses later to control how the system interacts with users and with the database. This data is stored in control tables. Control tables enable you to adapt the system to your environment. The data and settings in these tables determine how certain programs are displayed, the numbers assigned to transactions, the GL accounts for particular transactions, and so on. When you can manage a typical manufacturing function in more than one way, control programs let you establish a preference.

GoTo Function



The GoTo menu for non-component based programs such as Sales Order Maintenance displays the Add Link option. Use Add Link to create links to other programs using User Tool Maintenance (36.20.4). The links you add display on the Program Links drop-down

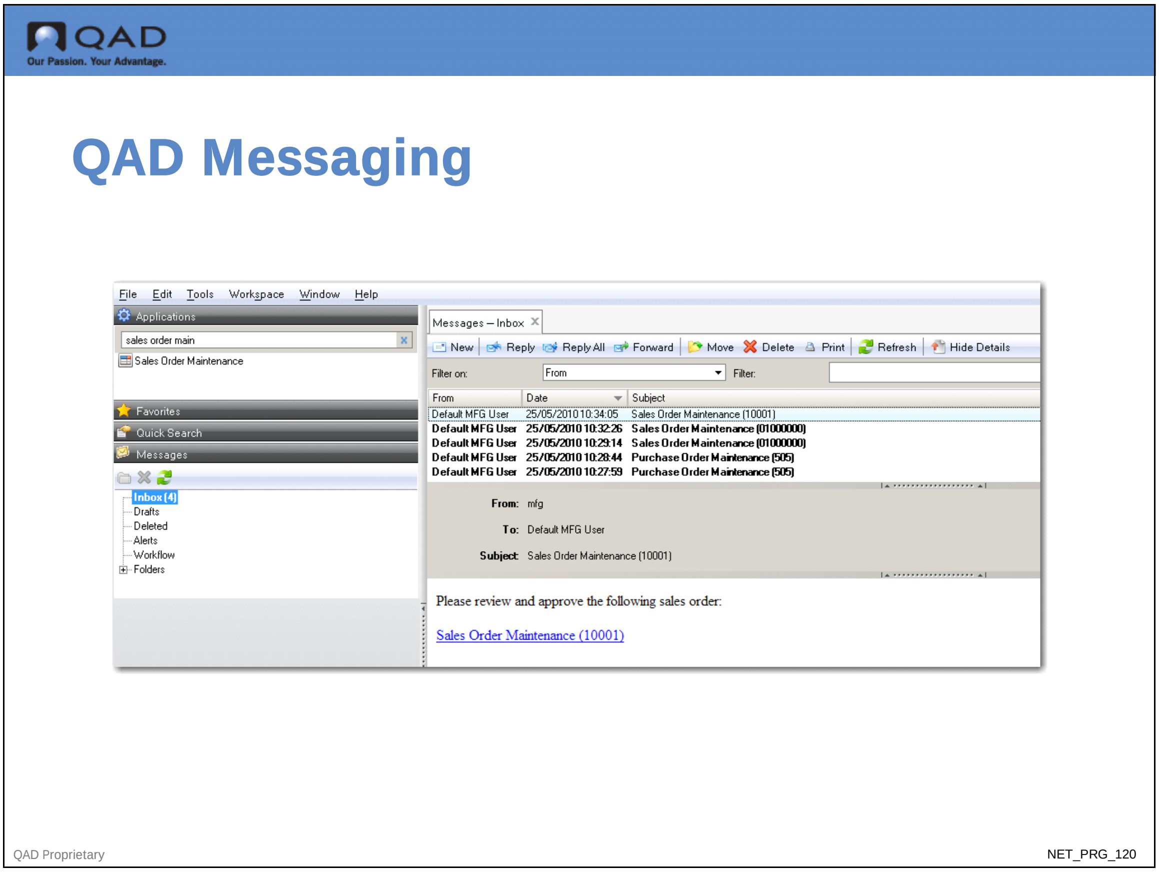
The GoTo option for component-based programs displays GoTo options and Related Views. Related Views are commonly used views and reports that apply to the record you are currently working with.

Go To behaves differently depending on whether the current field has data in it:

- If the field has a value, Go To invokes the View activity.
- If the field is blank, Go To invokes the Create activity.

All of the related views take the record you are currently using as the base for the information.You can simply click the GoTo to see the Create New Budget Group or Create New GL Account Unit of Measure.

Messaging

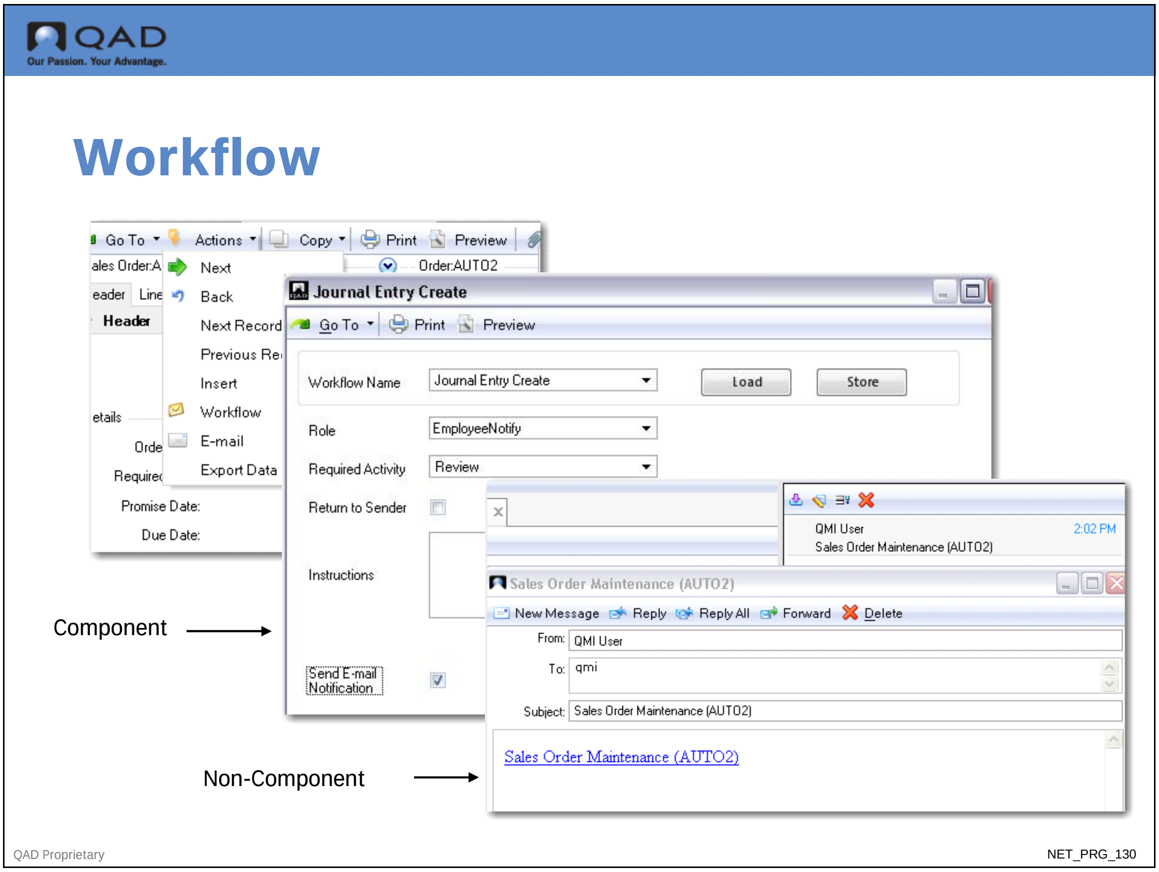


The QAD .NET UI includes a messaging capability so that you can send messages and workflow information to other users of the system. When using programs, browses, inquiries, and process maps, you have an Inbox on the Right side of the application area for sending and receiving messages. You can also send program or browse workflow messages, which include links to programs or browses, by choosing Actions|Workflow when using a program or browse

To Send a Message

- Click the Compose Message icon.
- In the To field, enter the user IDs or names of the users to whom you want to send the message.
- In the Subject field, enter text indicating the subject of the message.
- In the content area, enter or paste message content.
- Click Send to send the message (or click Cancel to cancel it).

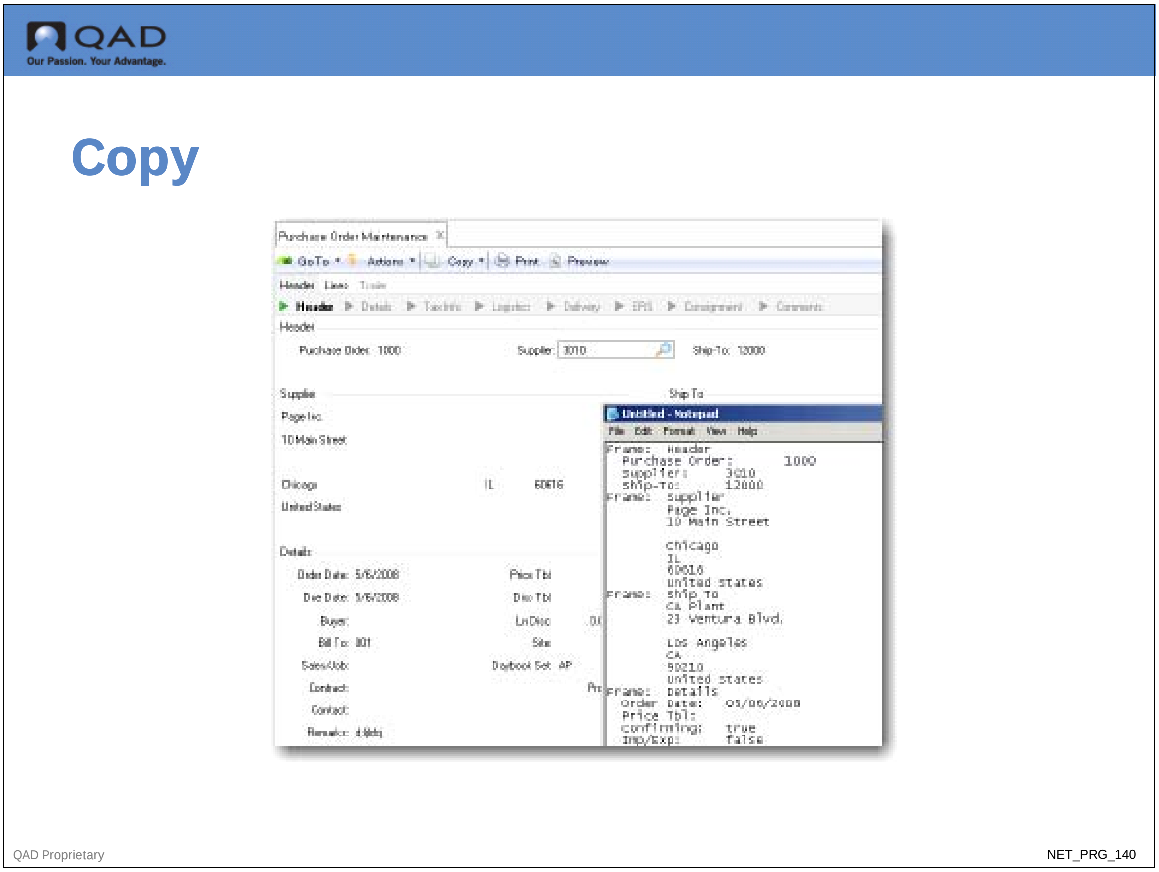
Workflow



Workflow is available for both types of program and is visible as an Actions menu option for non-component based programs and as a Tools menu option for component-based programs. When you click Workflow in a non-component based program, the system creates an e-mail message for another system user, with the current screen as an attached link. This e-mail is then posted to the user's Inbox.

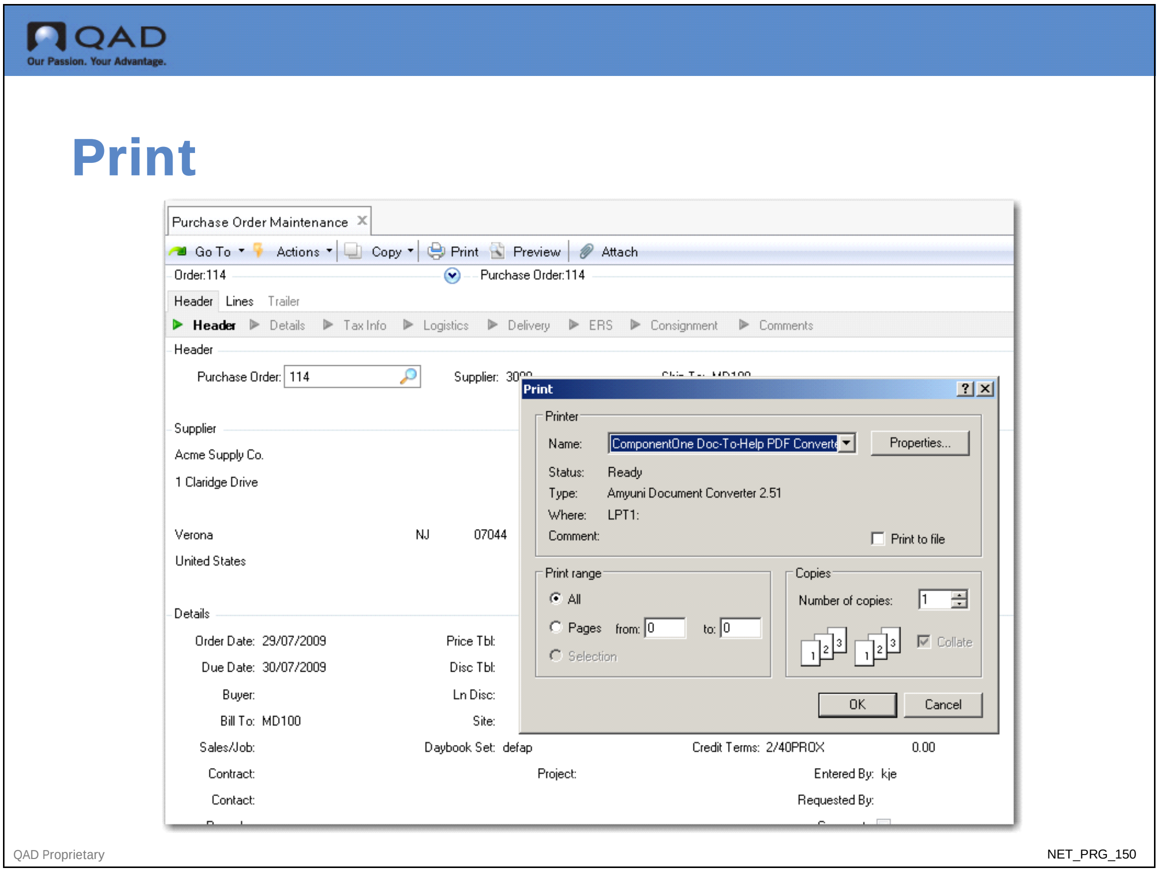
In a component-based program, you use the Workflow object dialog to specify the name of the workflow, the role of the recipient and activity they are required to perform on the link.

Copy



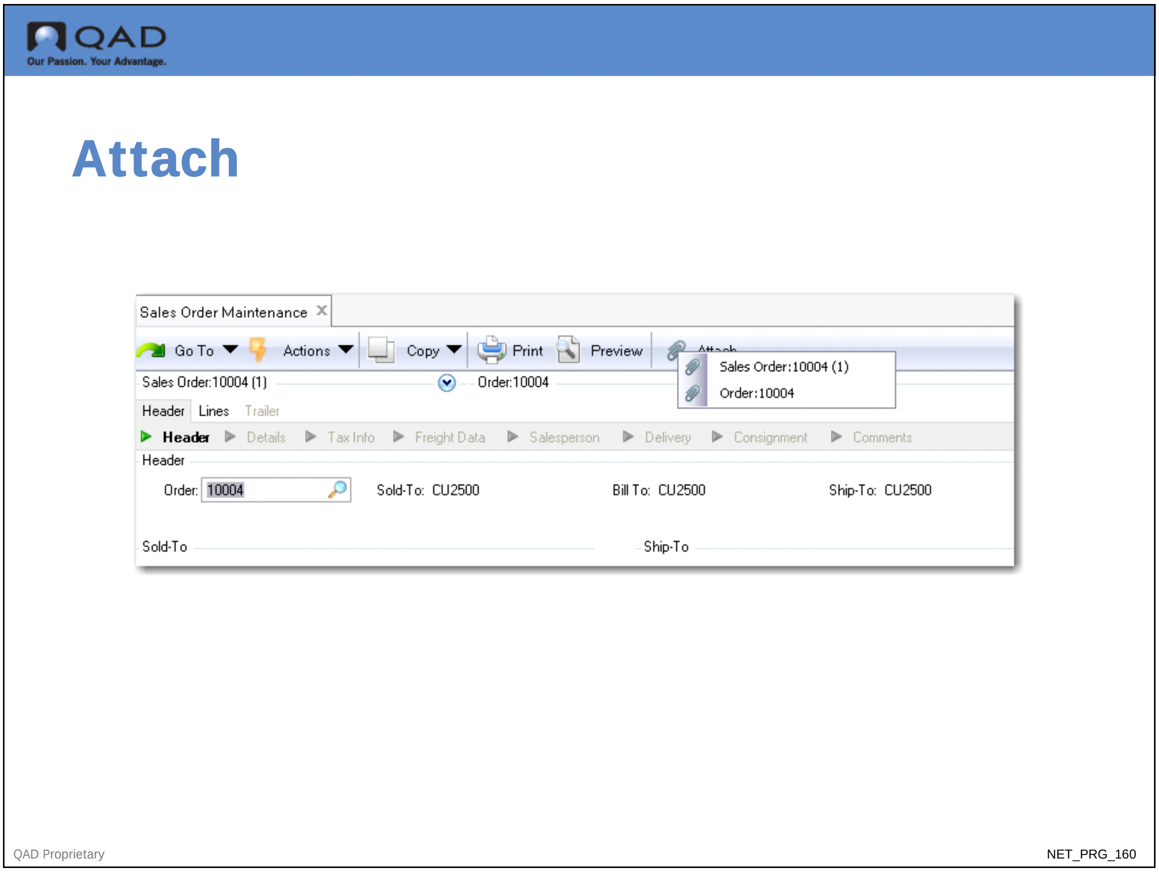
The Copy menu is only available for non-component based programs and lets you to copy the text of the current screen to the clipboard, or copy an image of the current screen to the clipboard.

Print



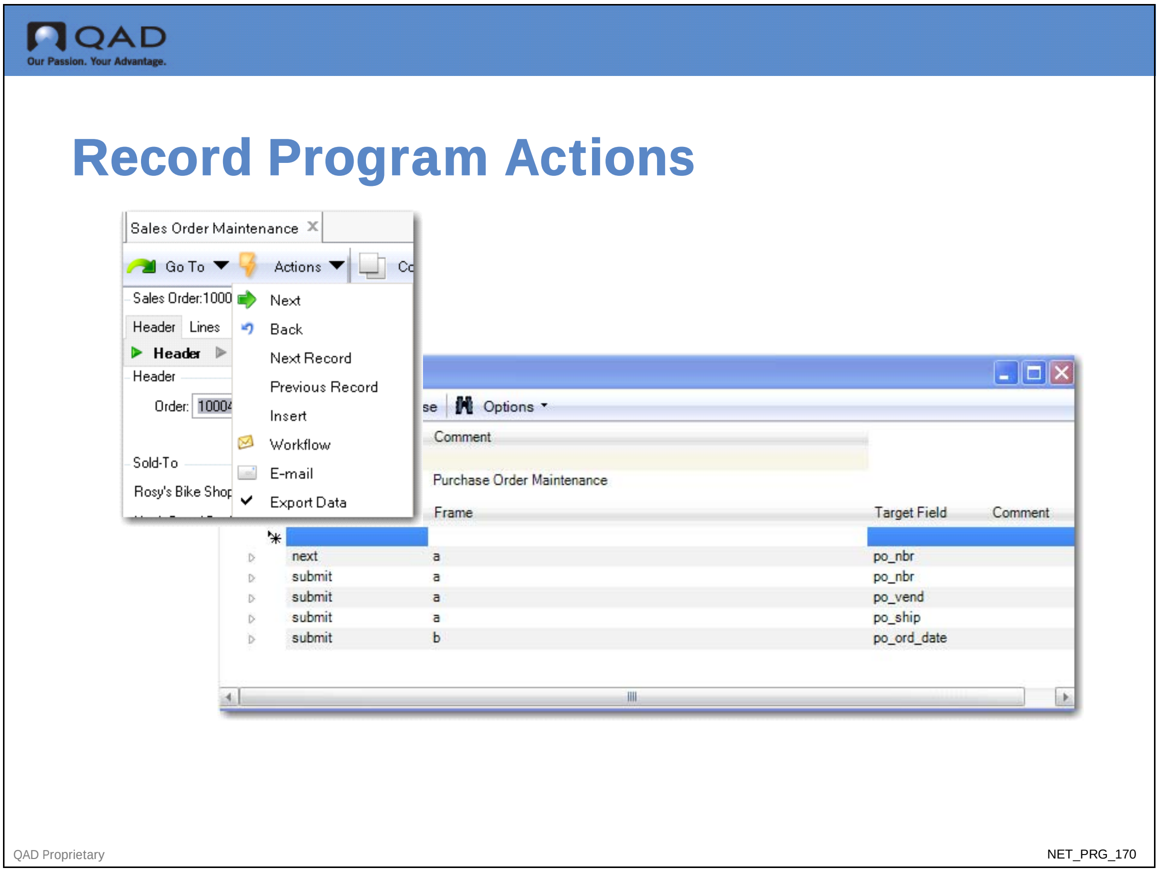
The Print menu is common to both types of program and prints the current screen to the default printer.

Attach



Attach lets you attach any type of document—such as a Microsoft Word file, graphics file, or PDF—to a record within the application. This integration ensures that all required documentation is immediately accessible when needed. You can attach and view any type of file if the corresponding viewing software is available on the client. This is both applicable to component and non-component based programs.

Record Program Actions



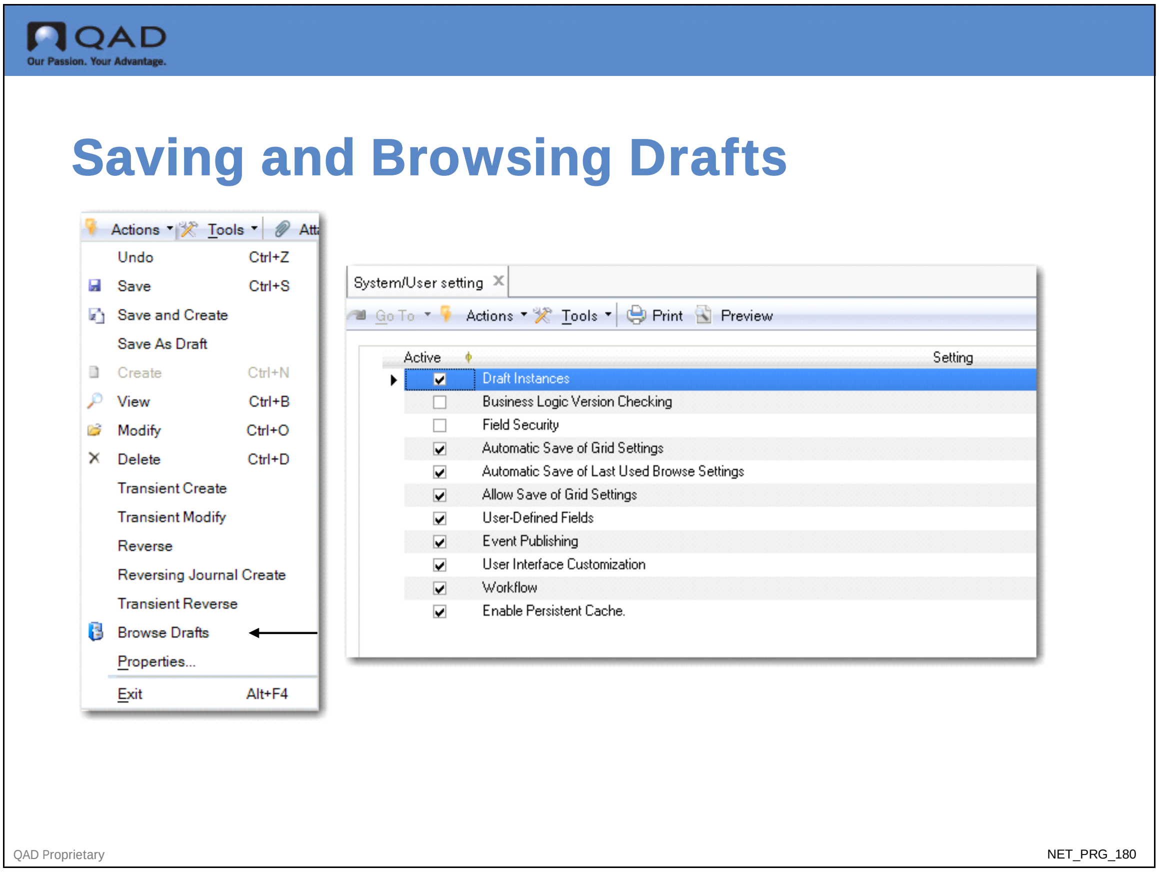
The Program Export File function is a test utility in the QAD .NET UI and is available in the Actions menu for all non-component based programs. This function lets you record your actions as you complete an application process and save the recorded actions to an .XML or .XLS file that you store locally. You then execute the saved .XML or .XLS file in the Execute Document Import function 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.

1 Launch a program.

2 Choose Actions|Export Data. 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

3 Enter a variety of actions for the program. These actions are now recorded. The Export Data dialog lists the actions, frames, and fields being recorded.

Saving and Browsing Drafts



The Save as Draft and Browse Drafts options are available for component-based programs only and must be enabled in Change System Settings. When Save as Draft is enabled, you can save selected records without completing all the validations required to ensure that the record is complete. You can then finish adding data to the record at a later time by using the Browse Drafts option to find the incomplete record. Only the following subset of components provides the ability to save unfinished records as drafts to be completed and approved later.

- Banking Entry
- Business Relation
- Petty Cash
- Customer
- Customer Invoice
- Finance Charge
- Journal Entry
- Supplier Invoice
- Supplier

Summary

QAD
Our Passion. Your Advantage.

Chapter Summary

- In this section you learned about program types and menu features for both component and non-component programs.

QAD Proprietary NET_PRG_190

Exercise and Knowledge Check

1 Sales Order Control is an example of what type of program?

2 In Sales Order Maintenance, select the GoTo function. Add a link to the Sales Order Browse program `sobr009.p`.

  Open up a sales order and GoTo the Sales Order Browse.

3 Display a completed sales order in Sales Order maintenance and send the sales order to your User ID by using the workflow.

4 Create a document in MS Word. Save it to the c:\ drive and attach the document to a purchase order.

5 Select GL Account List, run the report, and send the output to a printer.

Chapter 5

Browses in the QAD .NET UI

Objective

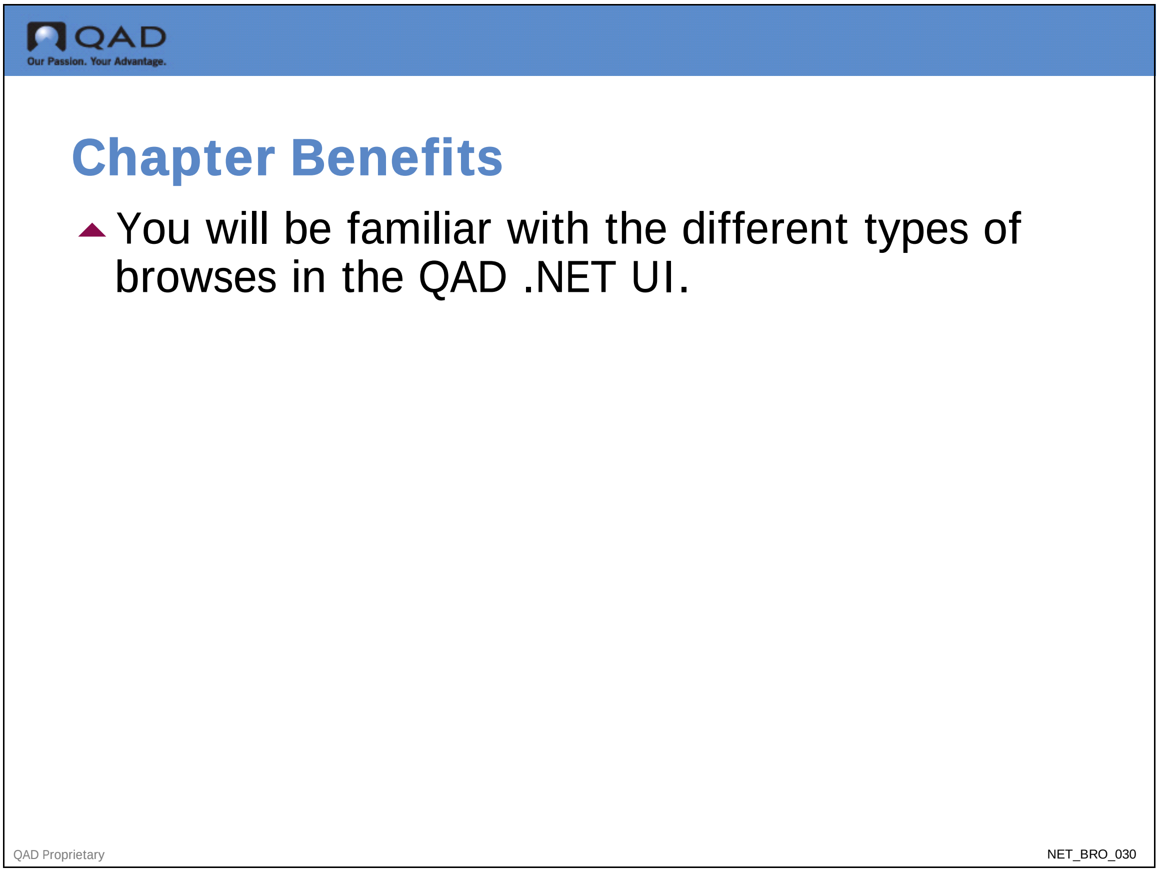
Chapter Objectives

- The objective of this chapter is to introduce browses in the QAD .NET UI.

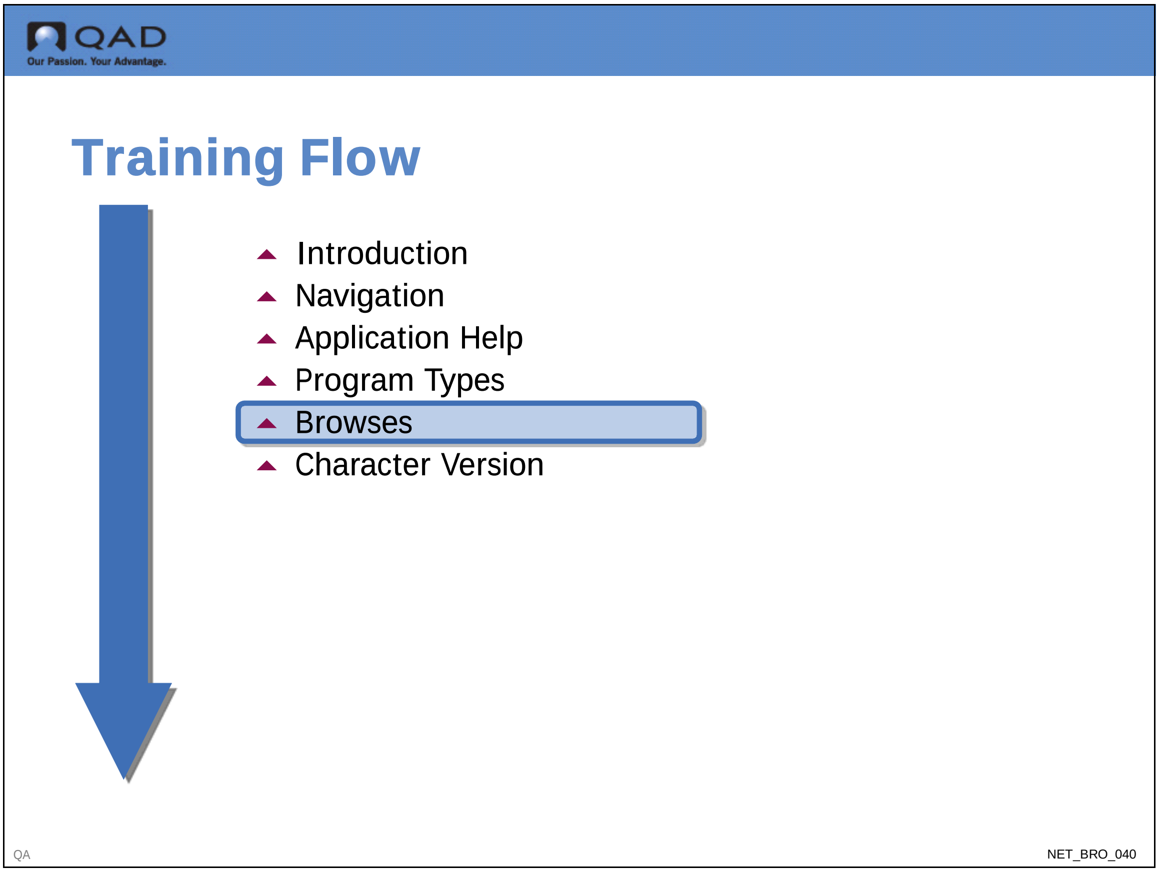
QAD Proprietary

NET_BRO_020

Benefits


QAD
Our Passion. Your Advantage.
Chapter Benefits
You will be familiar with the different types of browses in the QAD .NET UI.
QAD Proprietary
NET_BRO_030

Training Flow



Introduction to Browses in the QAD .NET UI

QAD
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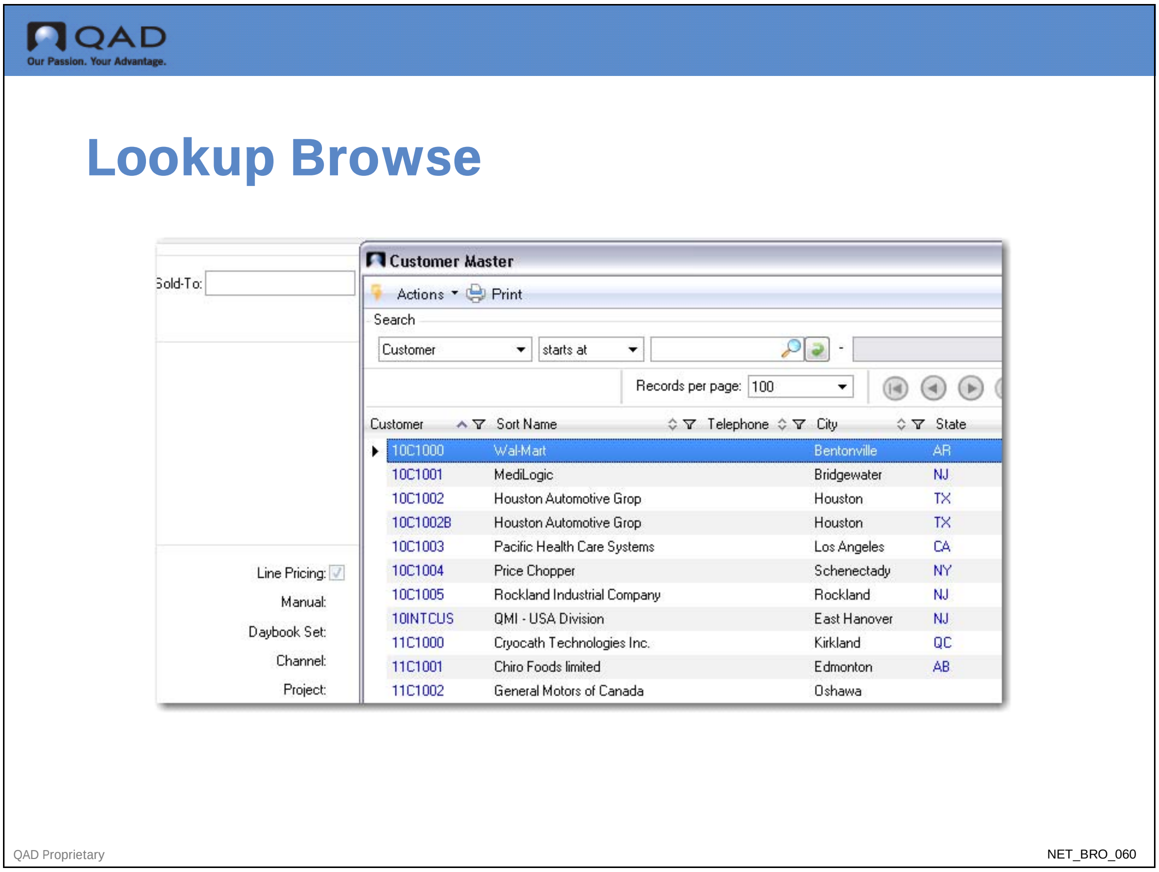
Introduction

- Browse Topics
  - Look-up Browse
  - Power Browses
  - Filters and Operators
  - Component-based browses
  - Favorites
  - Grouping
  - Column Options
  - Managing Filter Fields
  - Browse reports
  - Quick Search
  - Operational Metrics
  - Excel Integration and Browse Excel output
  - Using the Chart Designer

 NET_BRO_050

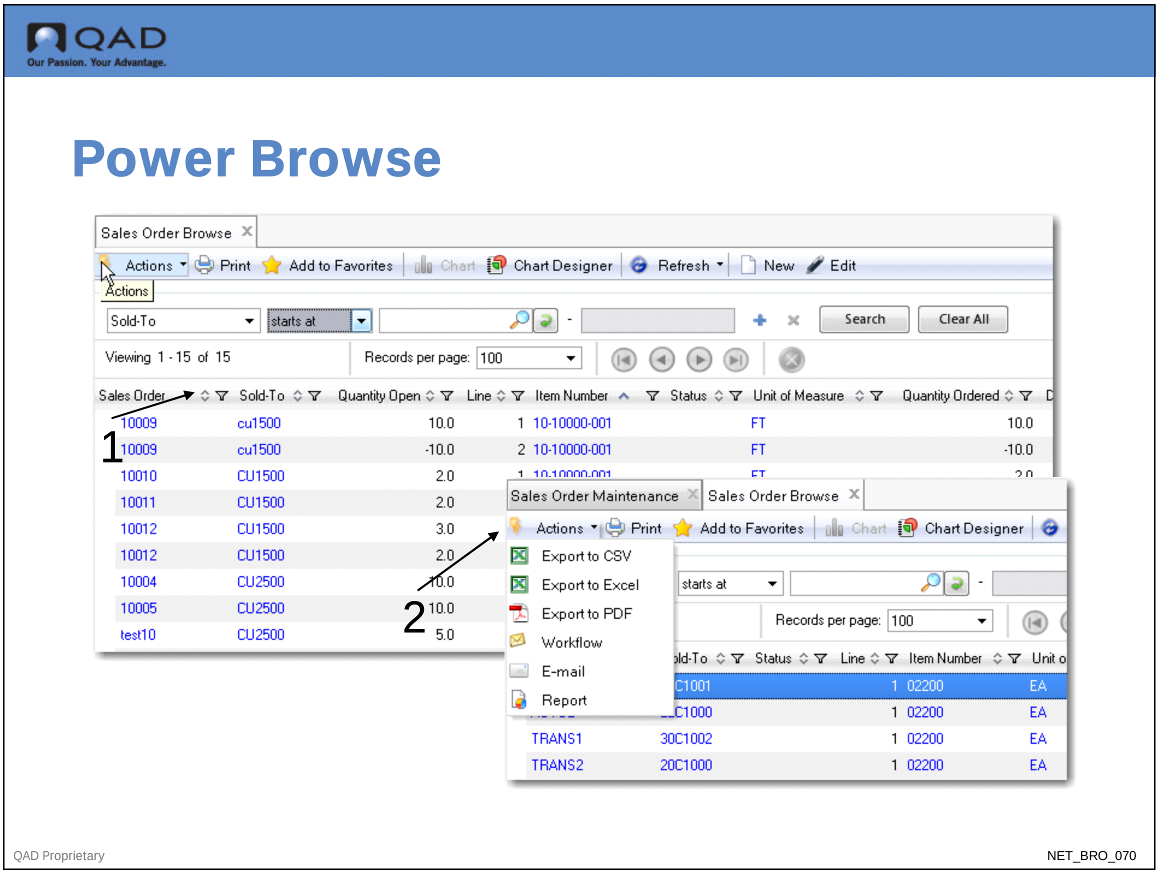
Lookup Browse



Return the value selected to the active field in a calling program. The lookup browse has limited functionality. Look-up browses cannot filter, graph, or print data

In the example, when you select the lookup Sold-To in Sales Order maintenance, you launch a lookup browse of Customer master.

Power Browse



A power browse can filter, sort, print, and graph data. Any column can be sorted. The first ten columns can be filtered.

Navigation

- Use the navigation buttons in the top left (1) to move through the records. The buttons from left to right move to the first set, previous set, next set, last set.
- Use the Records per page drop-down to determine how many records display at one time in the browse. The default value can be set using the Rows Per Page setting in Tools|Options.
- The Max Browse Records field in User Options Maintenance does not apply to browses in the QAD .NET UI. Use Tools|Options in the .NET UI.
- Attempting to display a large number of records at once can adversely affect performance. Instead, use the Search conditions to focus on the specific records you want to review.
- Drag columns by their headings to rearrange the display.
- As a shortcut, instead of clicking Edit, you can double-click on the row that includes the item.

Sorting

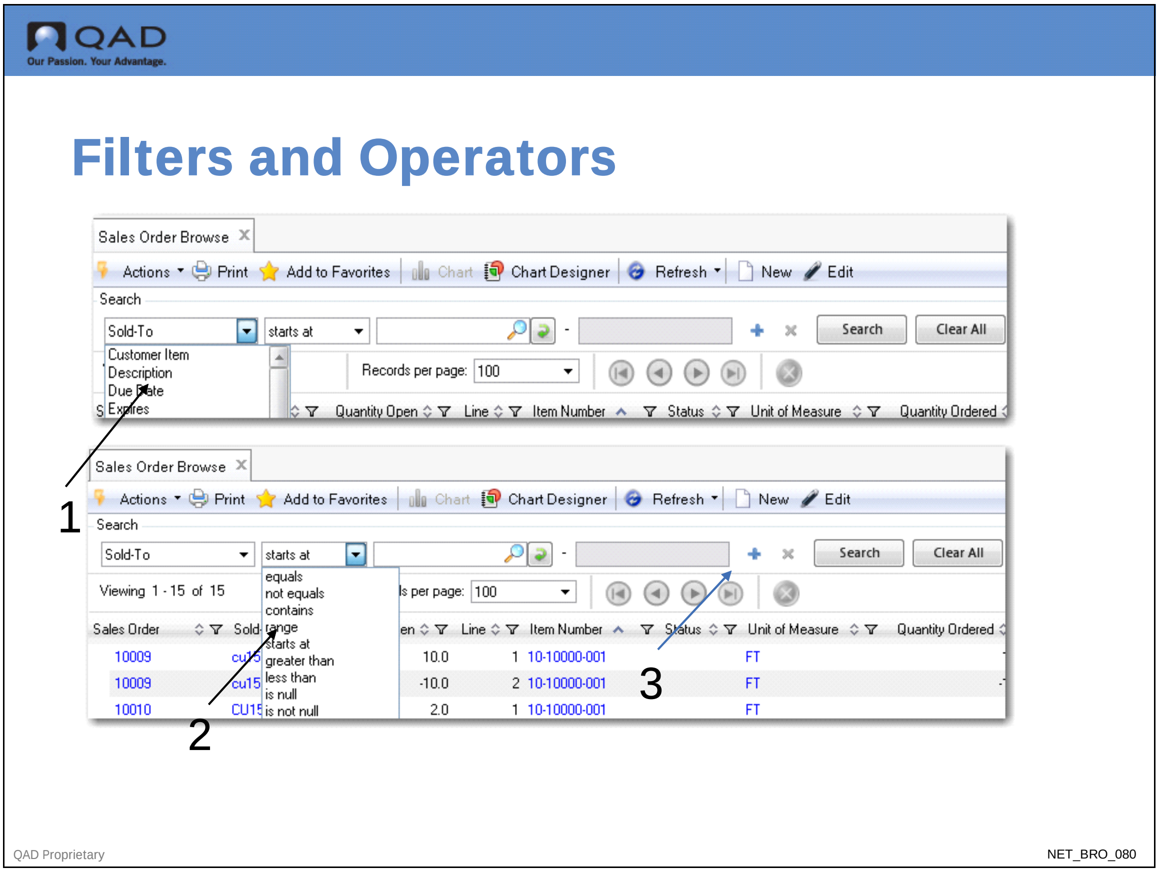
- Click Clear All to clear browse results.
- Any column in the title bar can be sorted.
- Click the heading to sort ascending order; click again to sort in descending order.

- Columns that cannot be sorted are generally non-indexed fields. Sorting by such fields degrades system performance.
- Blue underlined text indicates values for which you can drill-down.
- Use Browse Maintenance to set the default sort order for the multiple sort orders for the multiple columns in a browse
- Right-click any value to display associated links: either a more detailed browse, a related program, or an external Web page.

Actions

By selecting the Action menu (2), you can export the browse to .CSV, Excel , PDF or a report. In addition you can email the browse or include it in a workflow.

Filters and Operators

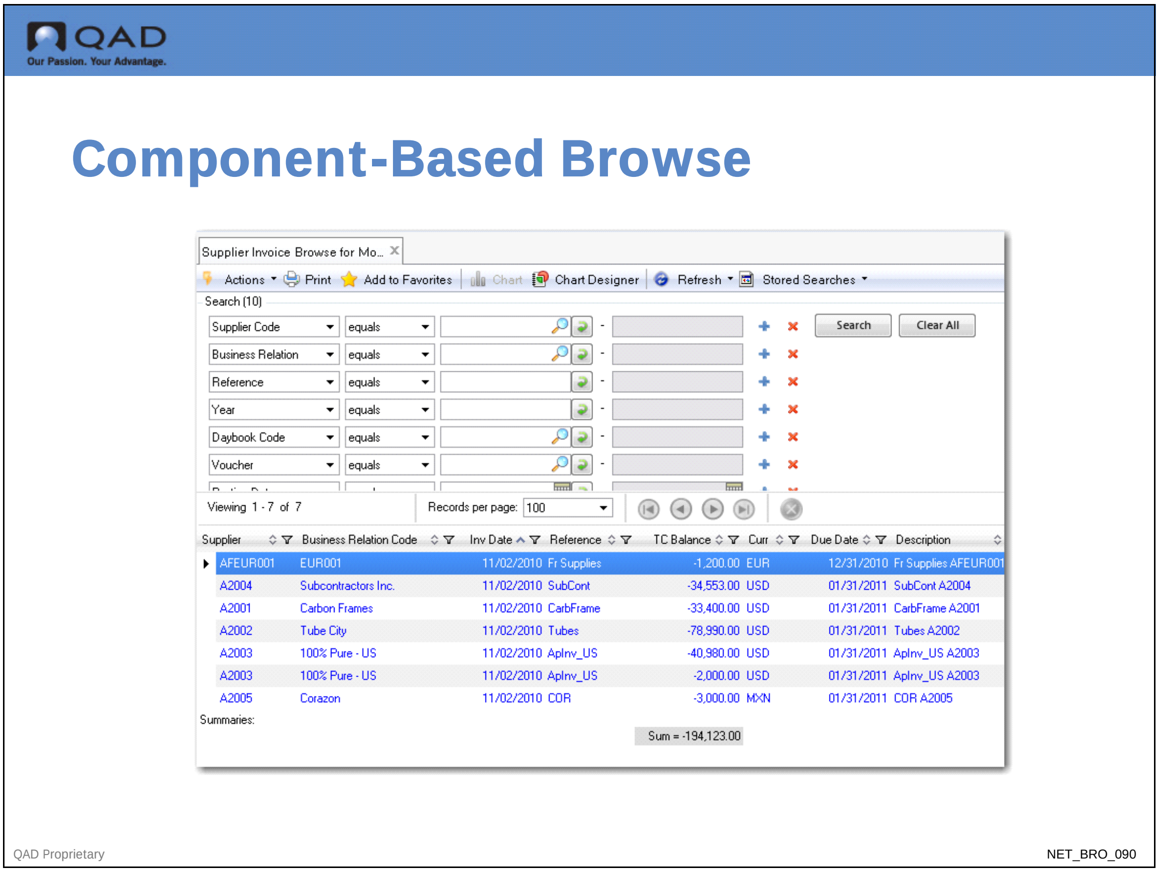


1 Filtering. If stored search criteria exist, you can select one by name from the drop-down list at the top of the search criteria (1). This sets up the filter criteria (2) to produce preconfigured results. Otherwise, the search fields display with a default configuration. Refine the search using combinations of filters and wild cards (*, and '.' for Financials browses). Click the + and X buttons (3) to add and remove search filters.Click Clear All to clear the browse results.

2 Search Operators. The various operators includes equals, not equals, contains, range, starts at, greater then, less than, is null, and is not null. When an equal sign is displayed next to the field, you enter an exact matching value.

3 To refine your search further, click the plus (+) icon to add another search row. You can add as many rows as needed, each with different search values and operators. If you choose the range search operator, the second search box is enabled for the ending value of the range.

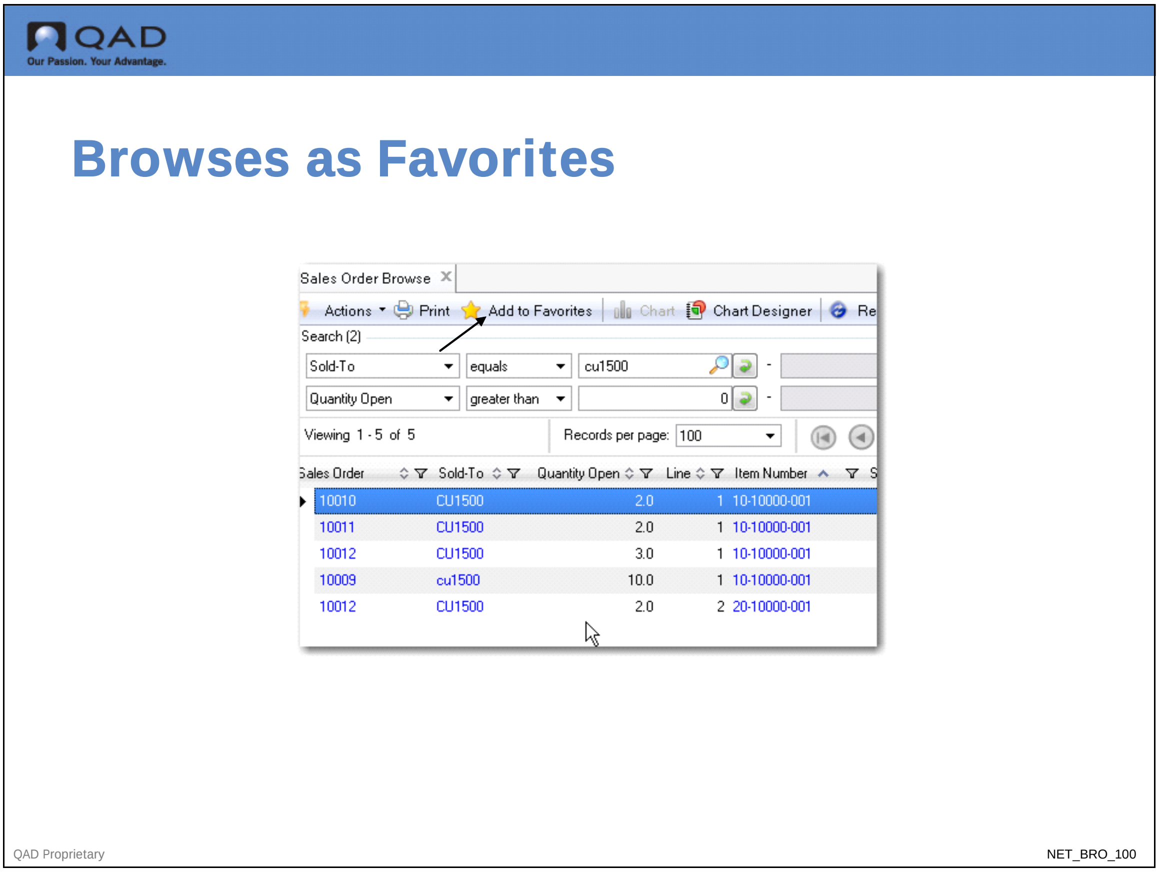
Component-Based Browse



Component-Based Browses

Component-based browses are launched when you view, modify, or delete a record created with a component-based activity. For example, Supplier Invoice View (28.1.1.3), Supplier Invoice Modify (28.1.1.2), and Supplier Invoice Delete (28.1.1.9) all launch browses, in which you select the record on which you want to perform the activity.

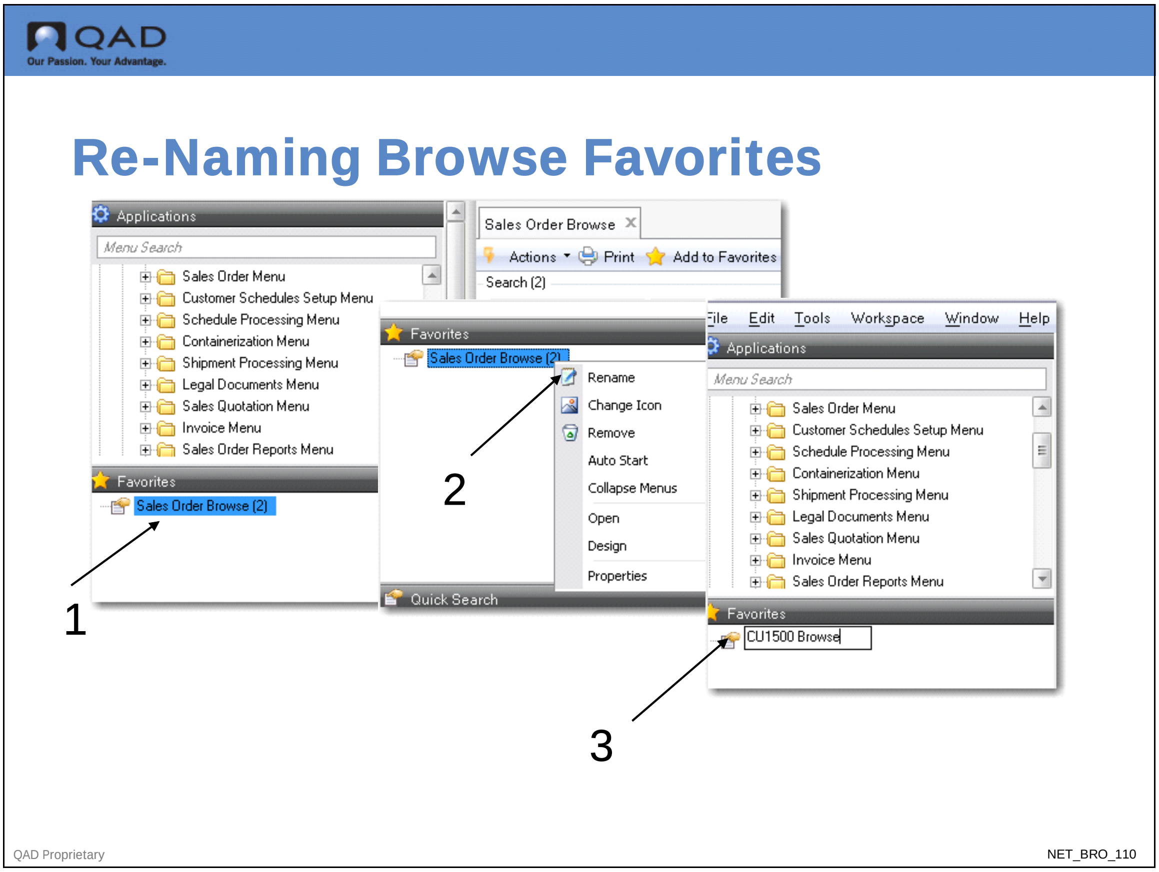
Browses as Favorites



Saving to Favorites

Click the Add to Favorites button. The browse is saved to your Favorites area and named based on the name of the browse. If it is the first instance you have saved, the browse name in the Favorites area is the name of the browse. If you save the same browse again, a (2) is appended to the name in the Favorites area. Once you have saved the browse to the Favorites pane, you can rename the browse and organize it in the same way as other items saved in the Favorites pane.

Re-Naming Favorites



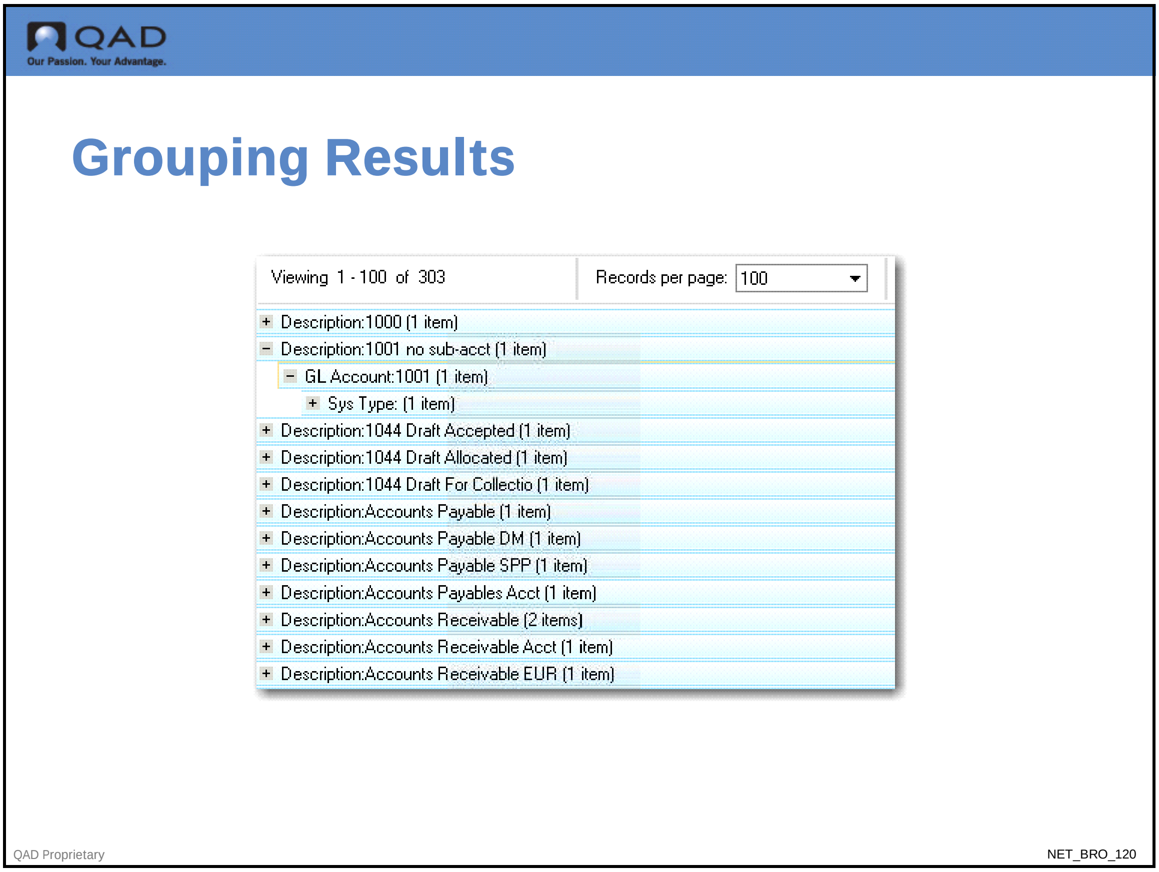
Re-Naming a Browse

1 Right-click the browse.

2 Click on Rename.

3 Rename the browse.

Grouping

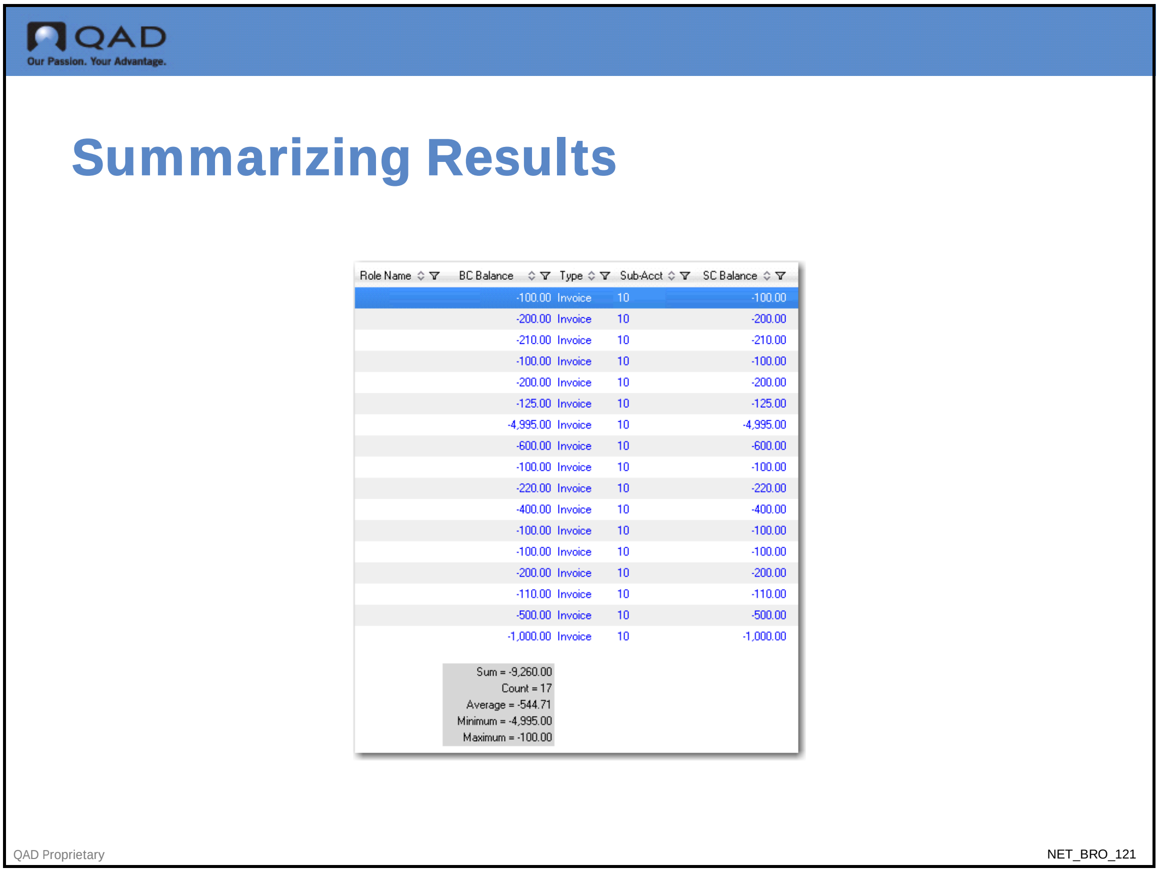


Right-click and select Group to group data by column type. The grid displays a summary of the column data, with the different elements sorted into groups. Each group in the list can be expanded using the plus sign next to the group.

Add other columns to the grid to create a group hierarchy. Group options are saved automatically in your last used settings, and can be reused when you open this browse again. You can also save these options as a stored search.

To remove the split, select the bar icon in the second panel and drag it back to its original position.

Summarizing Results



Role Name	BC Balance	Type	Sub-Acct	SC Balance
	-100.00	Invoice	10	-100.00
	-200.00	Invoice	10	-200.00
	-210.00	Invoice	10	-210.00
	-100.00	Invoice	10	-100.00
	-200.00	Invoice	10	-200.00
	-125.00	Invoice	10	-125.00
	-4,995.00	Invoice	10	-4,995.00
	-600.00	Invoice	10	-600.00
	-100.00	Invoice	10	-100.00
	-220.00	Invoice	10	-220.00
	-400.00	Invoice	10	-400.00
	-100.00	Invoice	10	-100.00
	-100.00	Invoice	10	-100.00
	-200.00	Invoice	10	-200.00
	-110.00	Invoice	10	-110.00
	-500.00	Invoice	10	-500.00
	-1,000.00	Invoice	10	-1,000.00

Sum = -9,260.00
Count = 17
Average = -544.71
Minimum = -4,995.00
Maximum = -100.00

The Summary right-click option lets you display summary information, depending on the column header in which you have clicked.

You must be able to view all the records on the screen page to enable the Summary option. If there are more records than can be displayed, set the Records per Page field to All.

By right-clicking the BC Amount column in the results grid for Supplier Invoice Browse, you can display the following summary information:

Sum. Displays a total sum of the invoice amounts

Count. Displays the number of invoice records

Average. Displays the average of the invoice amounts.

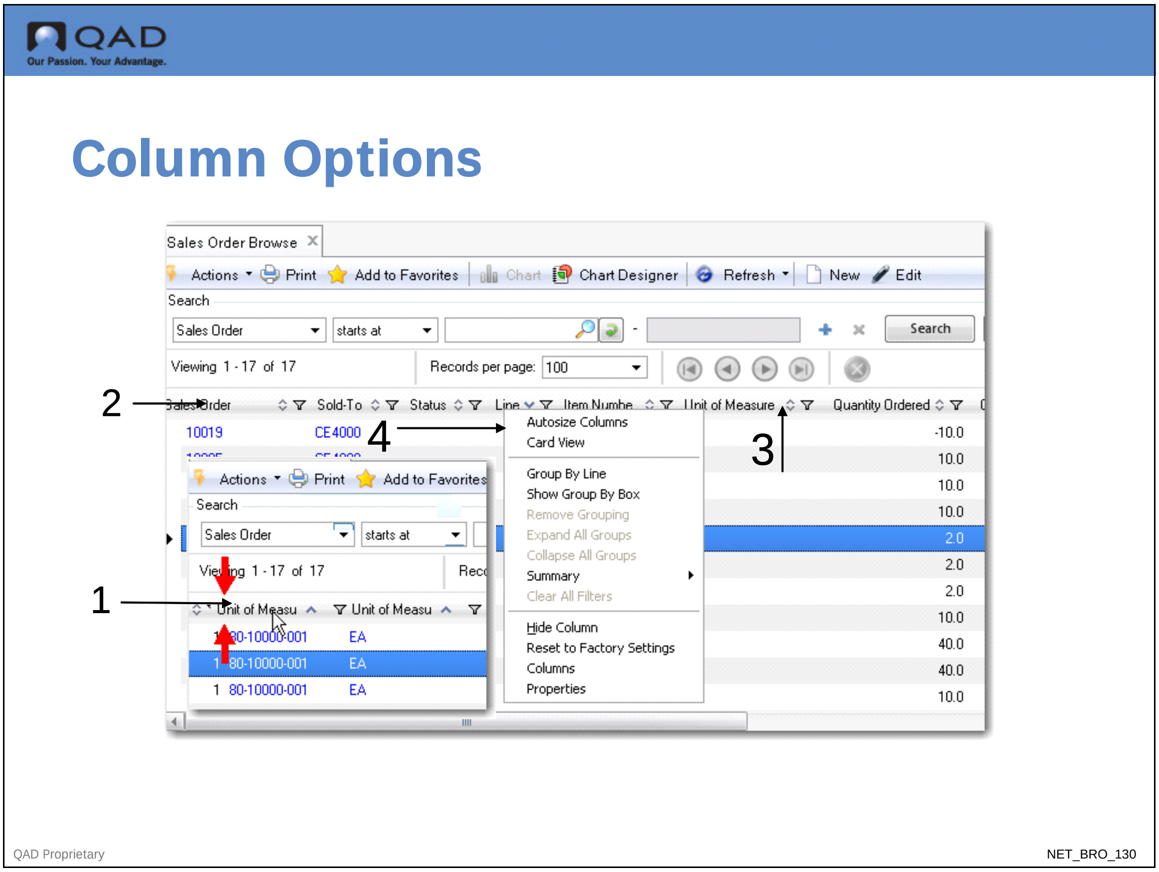
Minimum. Displays the lowest invoice amount.

Maximum. Displays the maximum invoice amount.

Note You only see meaningful results if the operator you choose applies to the data type. For example, applying the average operator to a date column does not produce a meaningful result.

Minimum and maximum are useful with dates, and summary and average with numeric fields.

Column Options



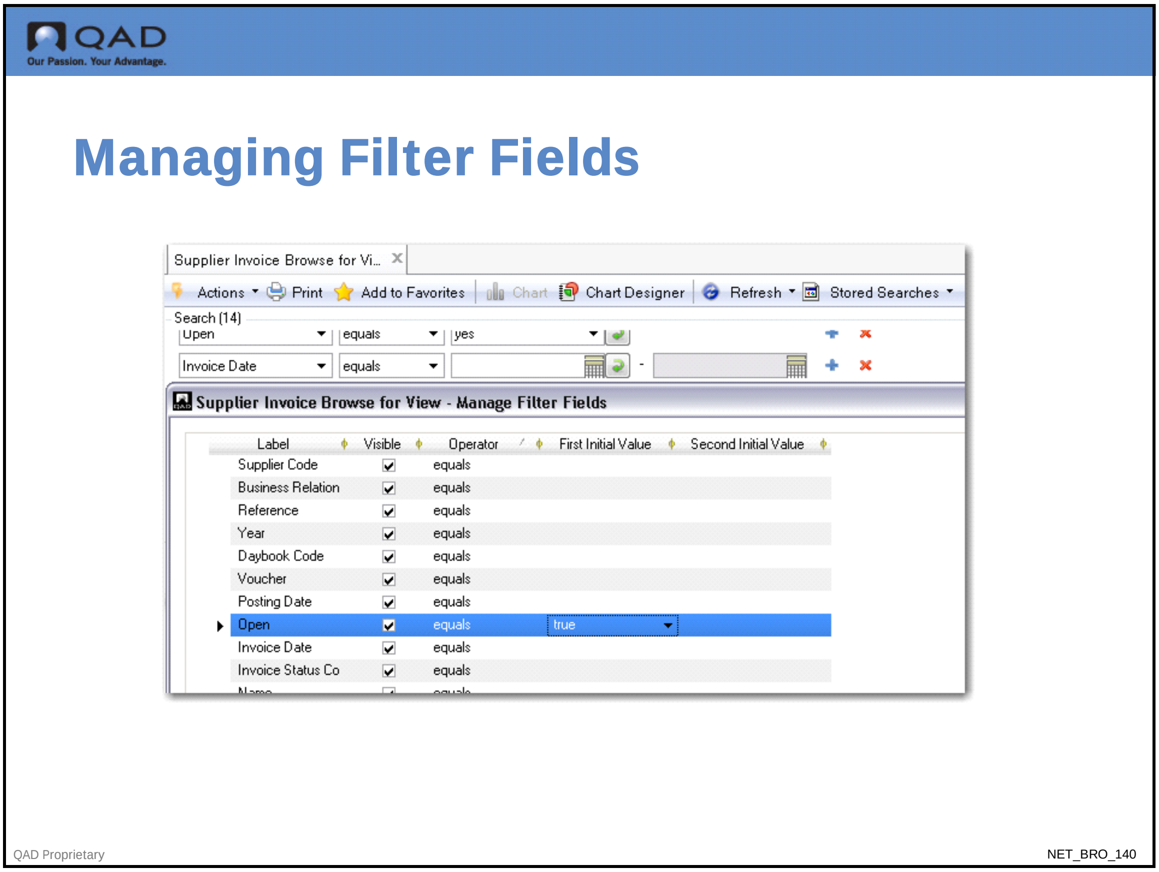
1 Change the column order by clicking the column header in the browse screen and dragging it to another position in the results list.

2 Adjust the column size by clicking on the border of the column header and dragging that border to the left or the right.

3 Click the column header to sort all data in the result list on any of the columns. Click the header again to sort the data in reverse order.

4 Each column header also features a drop-down filter option when all data has been retrieved. Click the icon to display the available filters

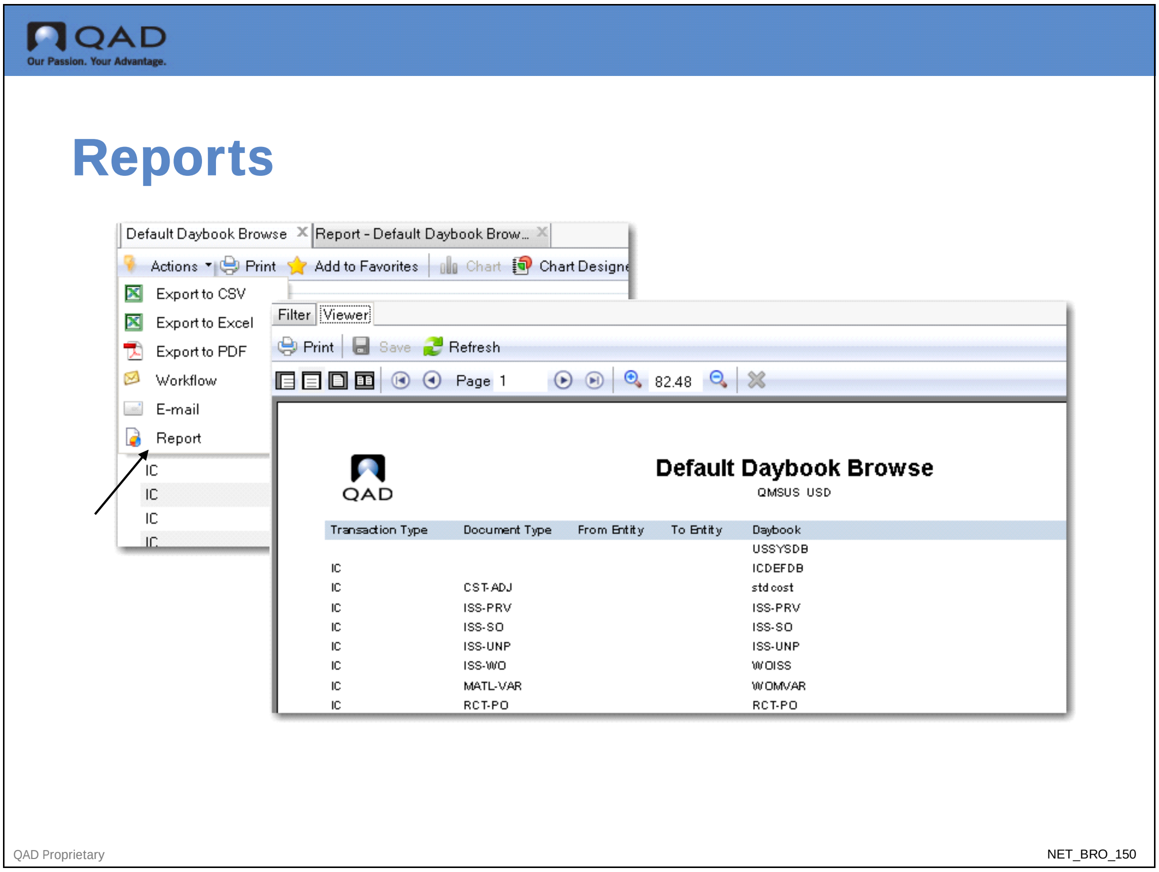
Managing Filter Fields



This option displays all the search fields possible for this type of record. You can use the Manage Filter Fields tab to:

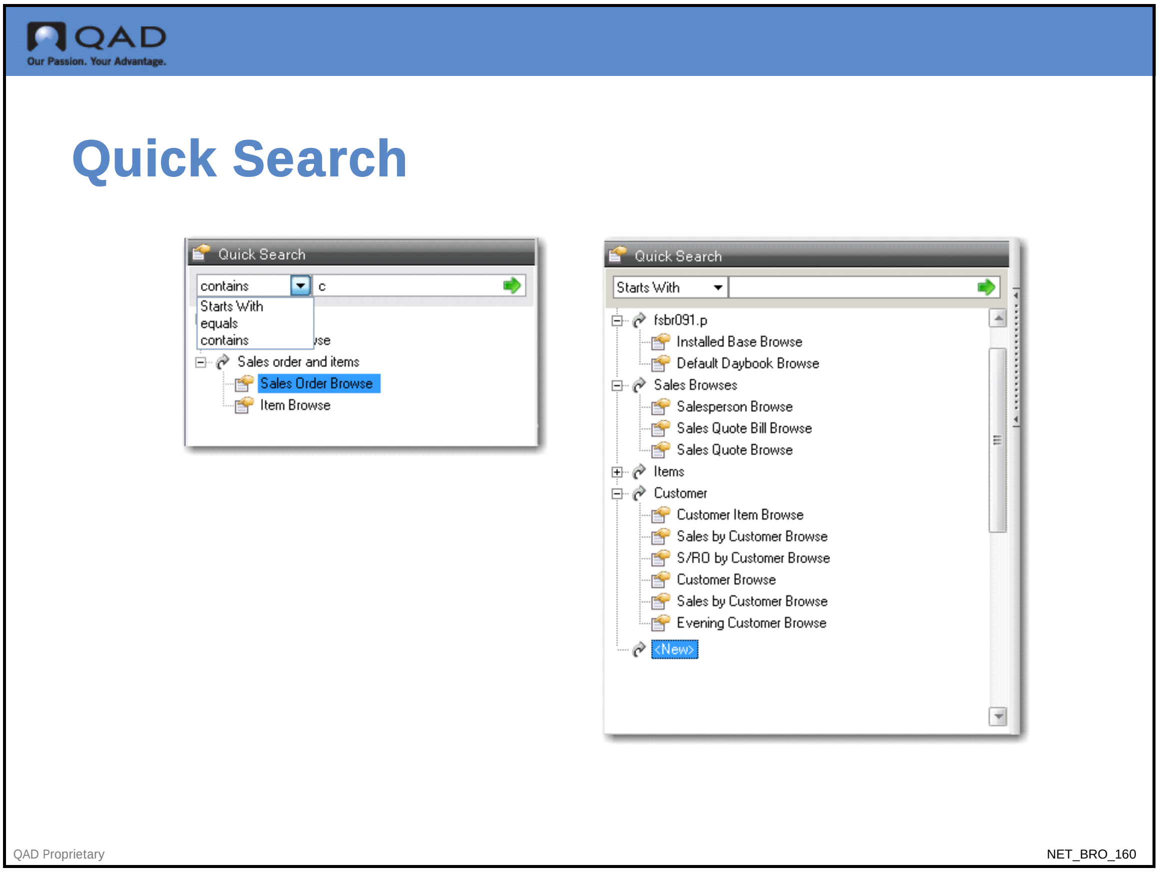
- Specify whether a filter field should appear on the Selection Criteria tab (Visible column).
- Specify in which order the filter fields should appear.
- Specify what operator to use when finding data to view.
- Define a persistent initial value or range of values for the filter field. The values for search criteria entered in the actual Search Panel are not saved with the stored search. However, the initial values entered in Manage Filter Fields are saved.
- You can refine the default search for GL accounts to retrieve only accounts with codes that are within a number range of 1000 to 5000.

Actions Menu for Browses



The Actions menu for Browses includes the options to Export to CSV, Excel, or PDF, and to generate a report from the browse results.

Quick Search

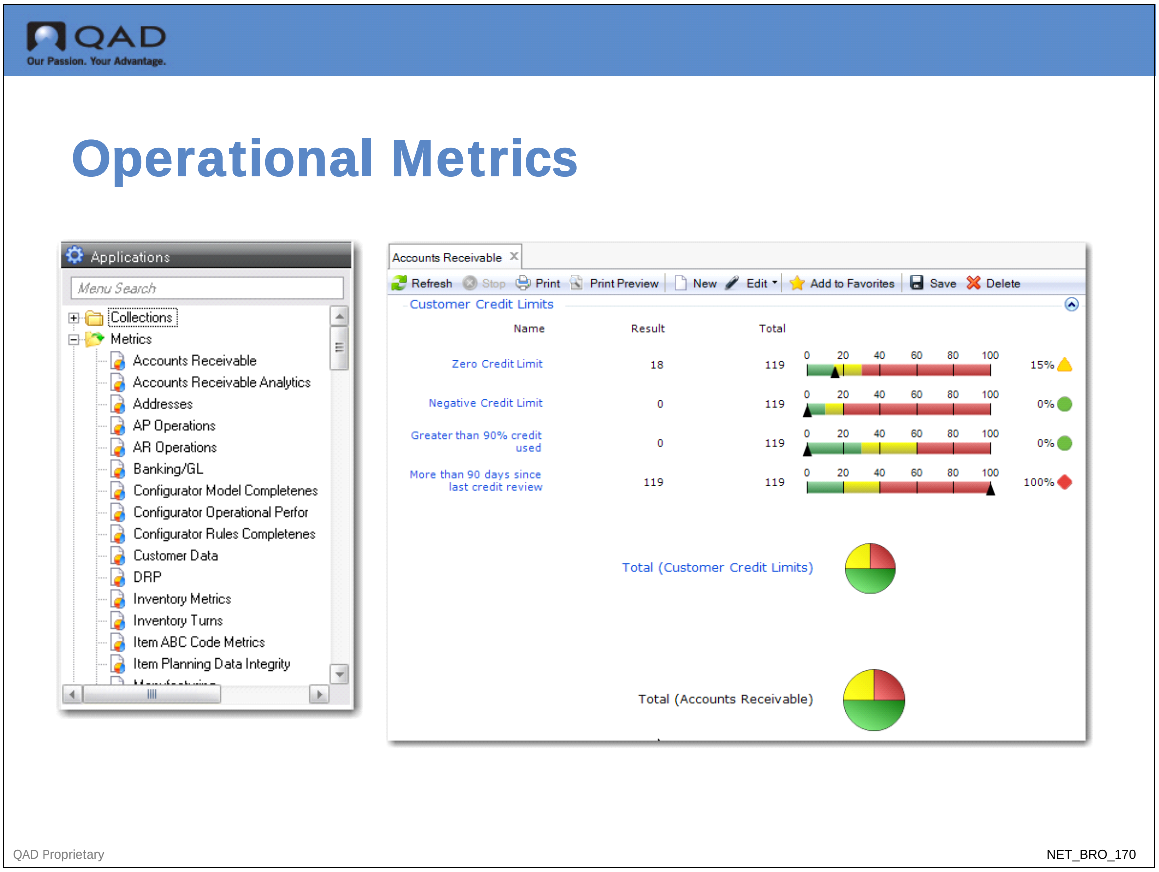


Search for a value across all of the fields in the browse.

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. You can use this filter for all browses.Use the Contains, Starts With, or Equals operators with the Search For filter. This option searches integers and text strings only and does not retrieve dates. Available on the left-hand side of the panel

Create groups of browses for quick search purposes. By default, the browse groups area of the panel is empty. Create a new browse group by right-clicking on the panel and selecting New to create a new browse folder. 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. Performance is affected when the browses have many fields with underlying joins.

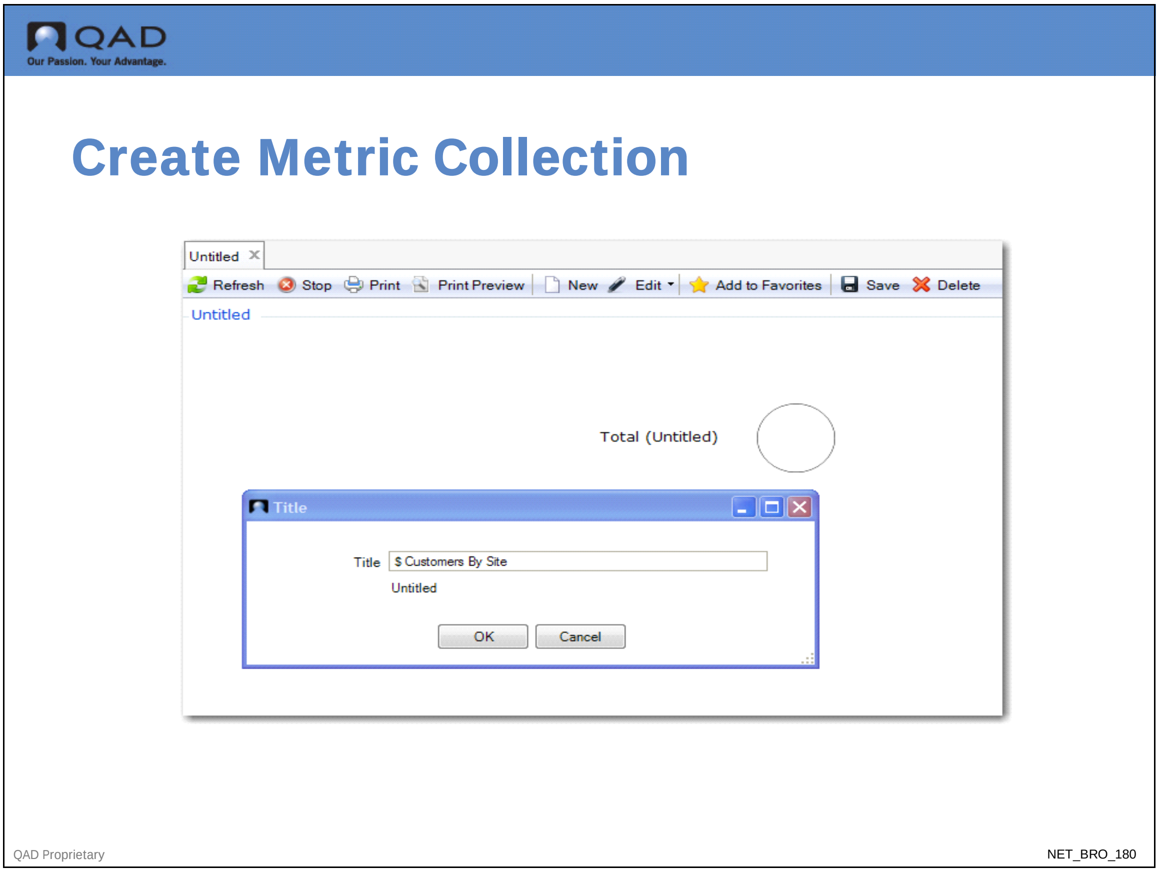
Operational Metrics



The Browse Operational Metrics option lets you create a visible metric from browse data. Operational metrics provide you with a live snapshot of production data, which lets you monitor in real-time how the system is being used. You can use operational metrics to visually track any type of browse data, including data from customized browses created in Browse Maintenance. xcel Integration

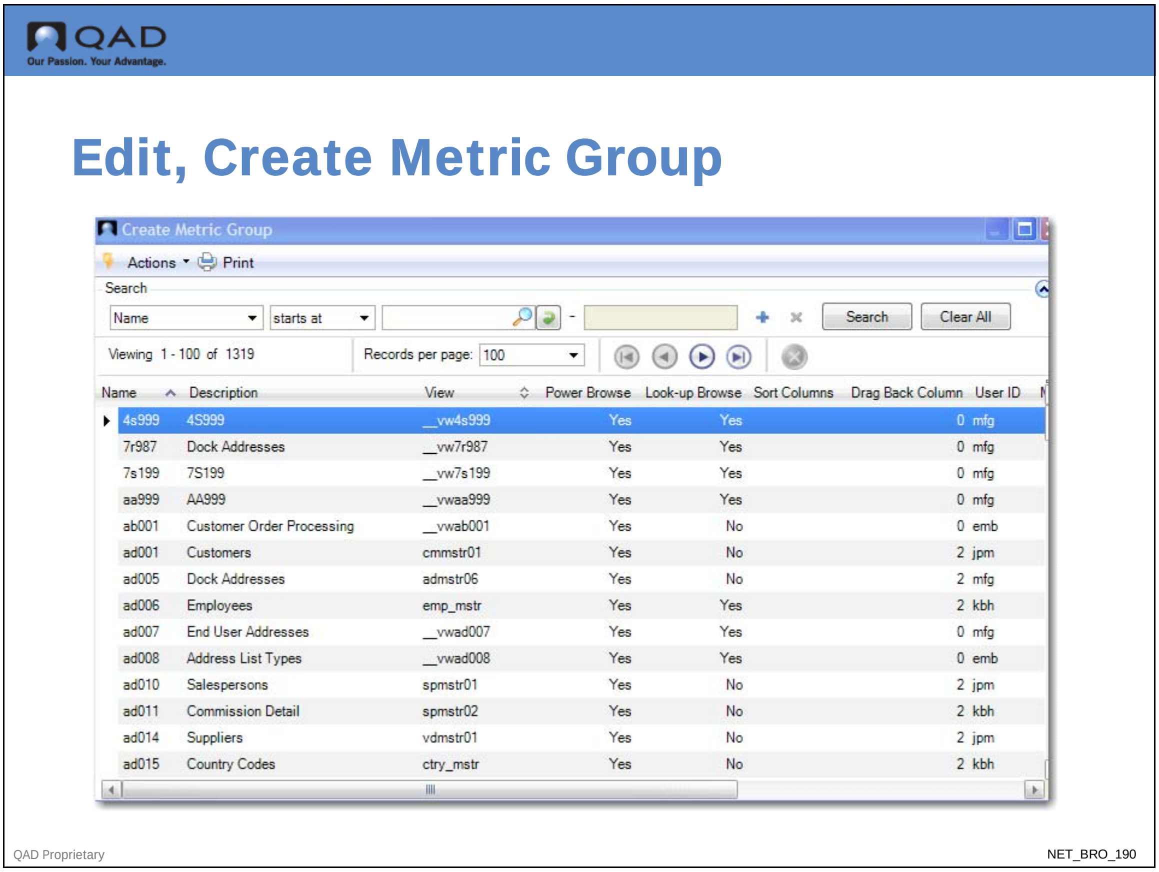
There are a number of pre-defined metrics that can be accessed under the Metrics folder. In this case, the Accounts Receivable metric displays different customer metric results.

Creating an Operational Metric



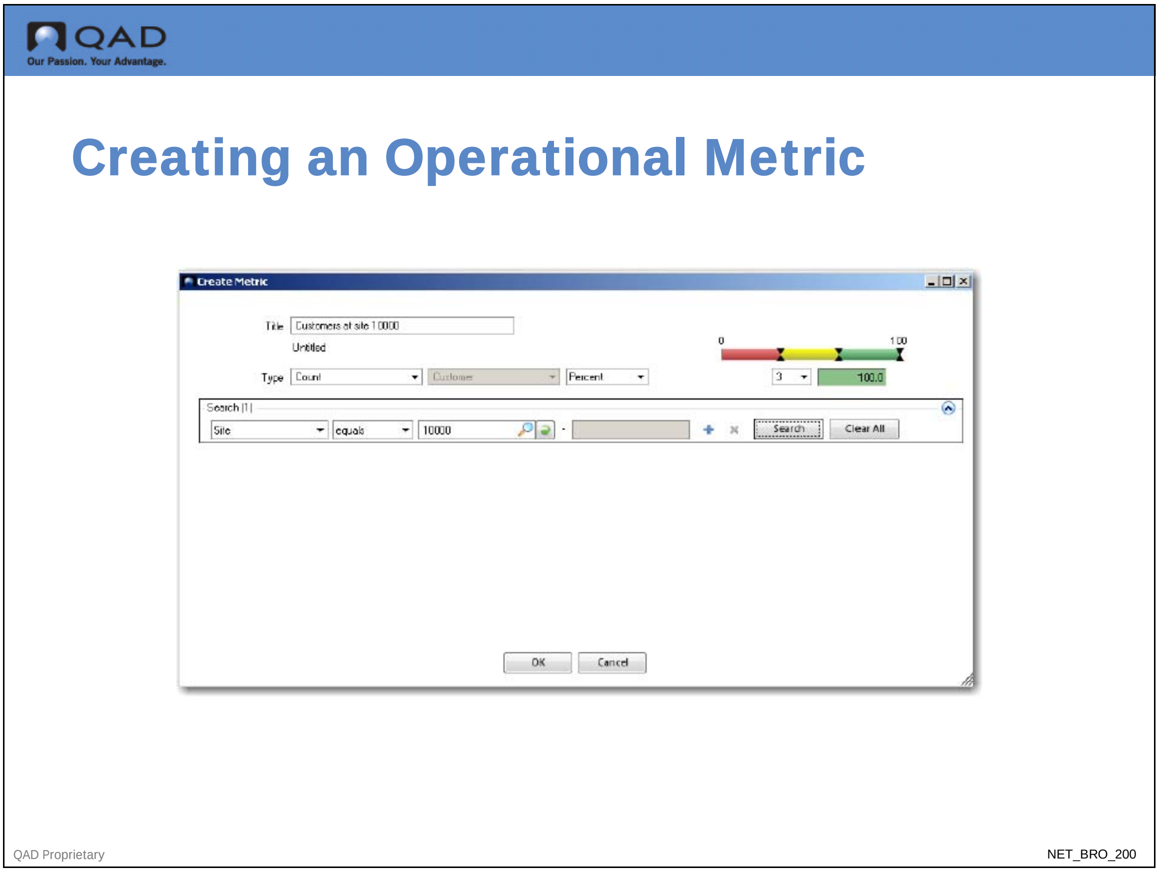
- Select Create Metric Collection from the Administration menu to create the initial metric collection. The system prompts you to name the collection.
- Right-click the collection title, or select Edit|Create Metric Group to create a metric group for the collection. You are prompted to select the parent browse for the group. Double-click the name of the browse to select it.

Creating a Metric Group



Enter a name for the metric group (for example, Customers by Site) and click OK. Select a browse on which to base the first metric.

Creating an Operational Metric



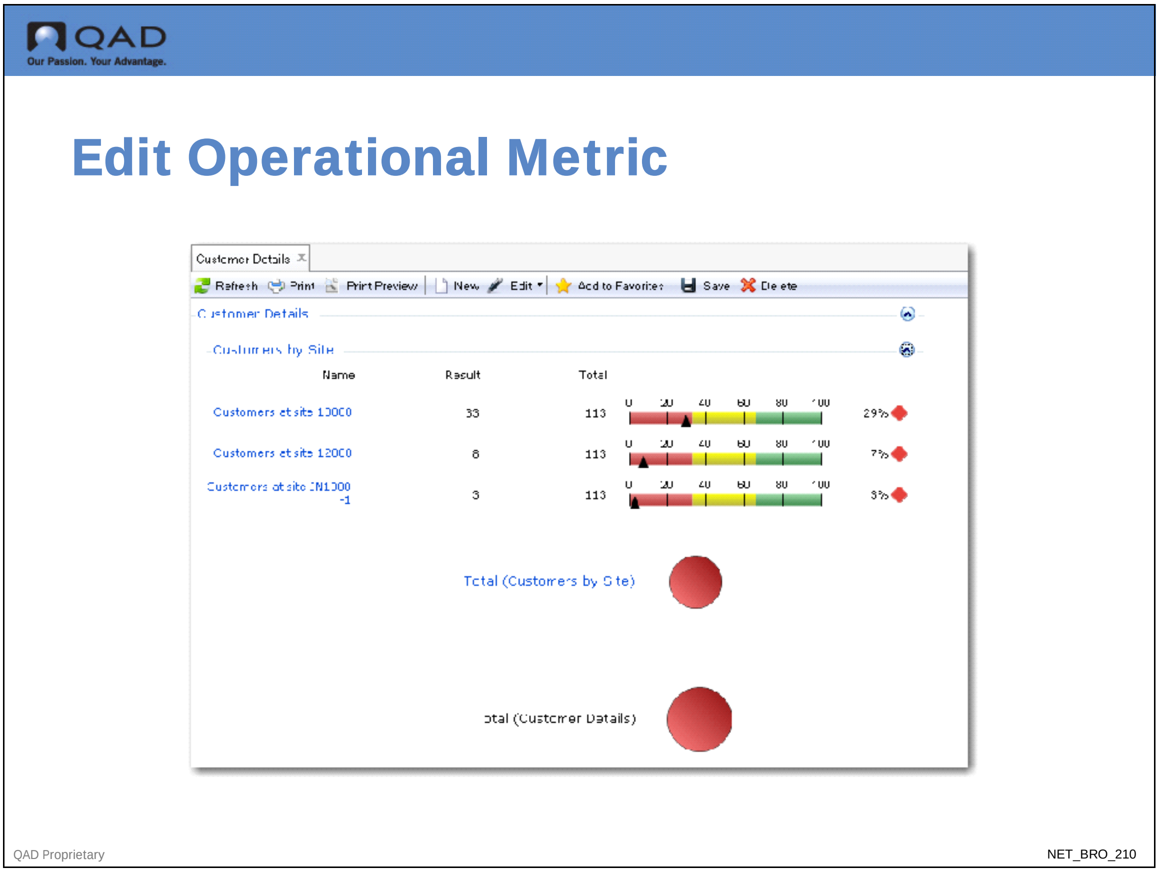
Title. Enter a title for the metric (for example, Customers at site 10000).

Type. The default type is Count. When you select the Count type, the browse filter drop-down is unavailable. Type options depend on the type of browse. For browses that produce numerical values as results, you can also choose Sum, Average, Maximum, or Minimum as the Type option. When you select a type other than Count, you can then select the value to which you apply the type.

Percent/Range. Select Percent to display the metric as a percentage of the browse total.Select Range to display the metric as a range of figures. This option lets you increase the granularity of the results.

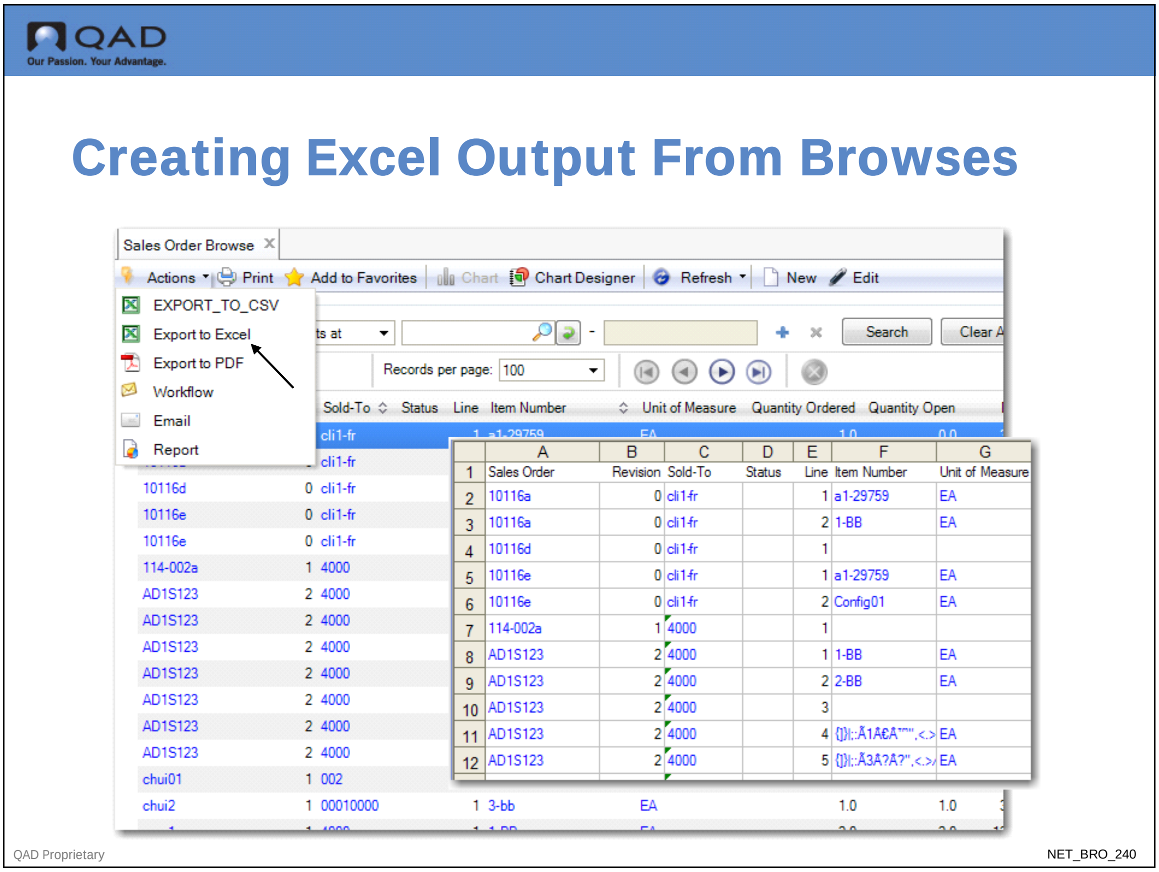
Search. Select the browse filter, operator, and value to define the metric. For example, this metric is based on the number of customers in Customer browse whose site code equals 10000. You therefore select the site code filter to equal 10000. You can set multiple filters for the metric, as you do on a normal browse. Click Search to find out how many sites meet the criteria (in this case, the number is 33). This information is displayed as a percentage of the total (when you have selected the Percent display option). Use the slider controls on the percentage bar to set the color code for thresholds.

Editing Operational Metrics



You can edit metric details by right-clicking the metric name on the main screen and selecting Edit. Click on the Save button to save the operational metric to the Metrics folder, New to save the metric for the first time, and Replace to replace an existing metric.The metric is now available in the Metrics folder. You can add operational metrics to Favorites. To refresh the metric information, re-run the individual browses from within their metrics.

Creating Excel Output From Browses

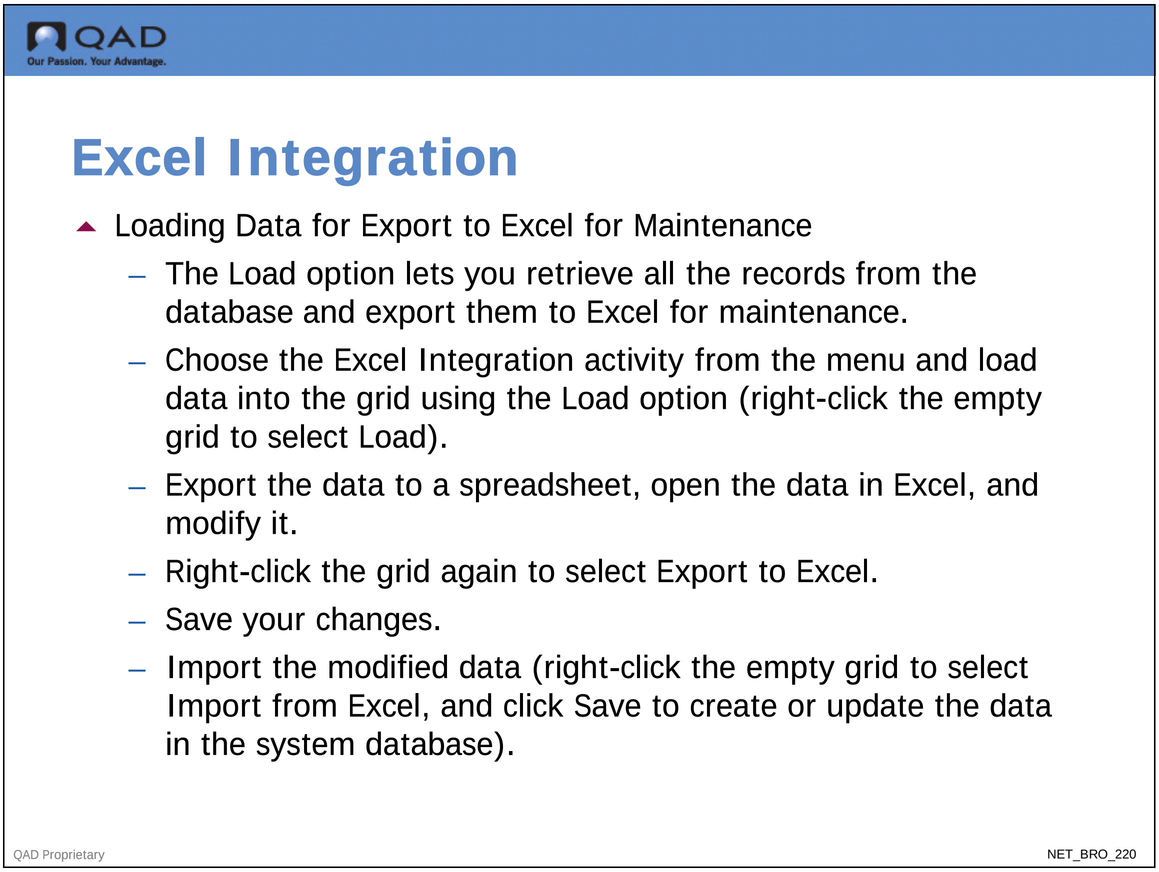


Click the Actions Tab and Export to Excel button.

The export creates three worksheets in an Excel workbook, which is opened for display.

- *Data.* This page contains the actual data columns and headings from the printed browse.
- *Search Conditions.* This page displays any search conditions used to filter the printed data. The conditions listed are field name, operator, value, and, for a range operation, the ending value.
- *Info.* This page lists details about the report generation including the ID of the user generating the report, the date the report was generated, the name of the browse, and the browse program.

Excel Integration



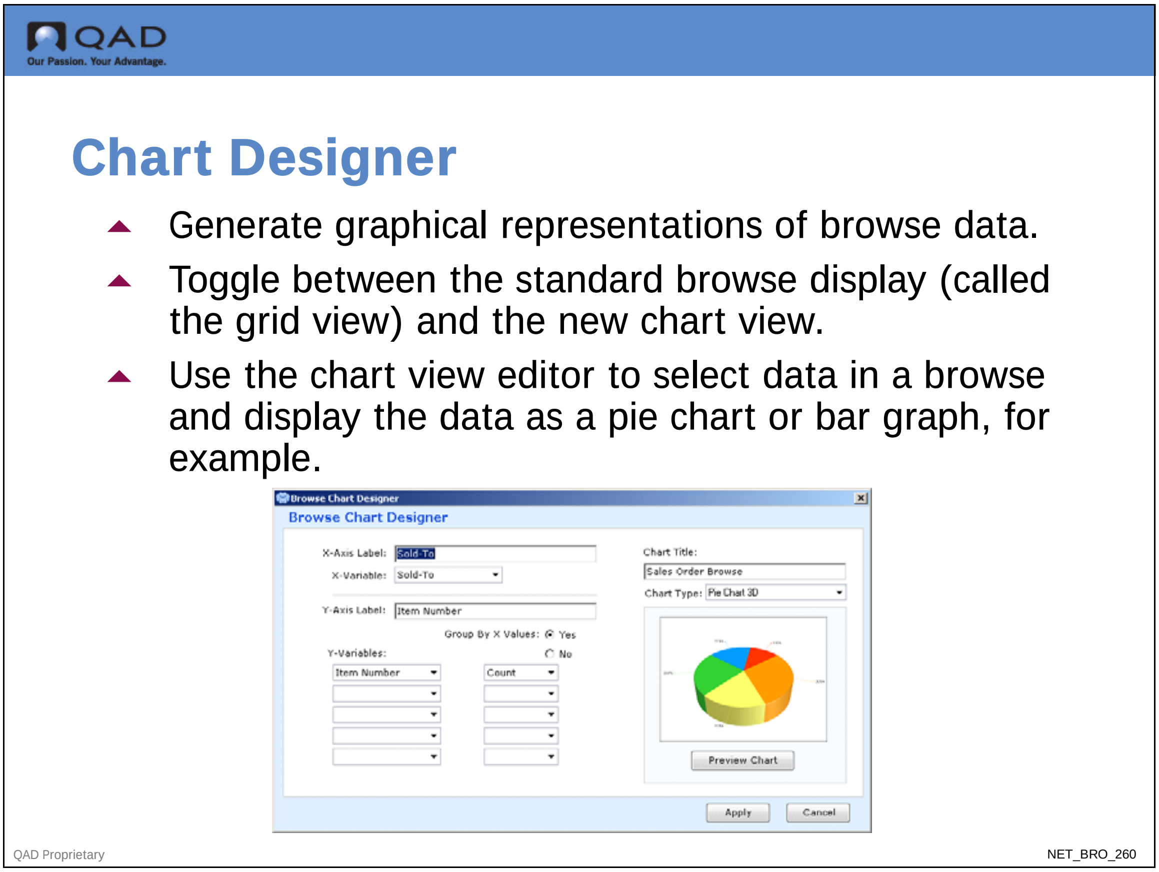
Excel integration is a utility for component-based programs that lets you export data into Excel spreadsheets, create new data within Excel, and import it to the system database, where it is validated before being saved.

Note The more advanced bi-directional Excel integration is supported in only a subset of components.

This activity has multiple steps:

- Choose the Excel Integration activity such as Country Excel Integration.
- Load data into the grid using the Load option (right-click the empty grid to select Load). The Load option lets you retrieve all database records for a supported business component.
- Export the data to a spreadsheet, open the data in Excel, and modify it (right-click the grid again to select Export to Excel).
- Save the Excel file in a folder that can be accessed so that the Excel sheet can be modified.
- Modify the Excel file and save for import. Right click on the maintenance screen and select Import From Excel.
- Import the modified data (right-click the empty grid to select Import from Excel, and click Save to create or update the data in the system database).
- Notice the changes that were made.

Chart Designer



Generate graphical representations of browse data.

Toggle between the standard browse display (called the grid view) and the new chart view.

Use the chart view editor to select data in a browse and display the data as a pie chart or bar graph, for example.

Using The Chart Designer

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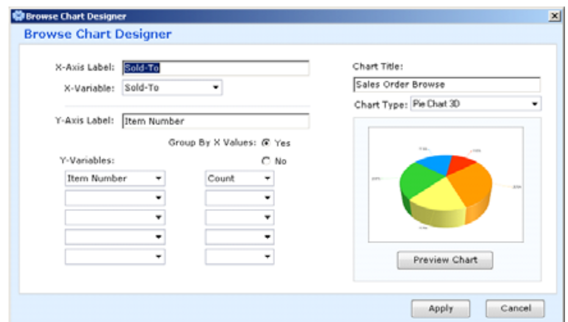
Creating Charts from Browses

1. Start a browse and click on the Chart Designer icon.
2. Design a chart using the Browse Chart Designer.
   - Set X- and Y-Axis labels
   - Set X and Y variables
   - Group By X Values
   - Chart Title
   - Chart Type
   - Preview



QAD Proprietary

NET_BRO_270

Chart Options

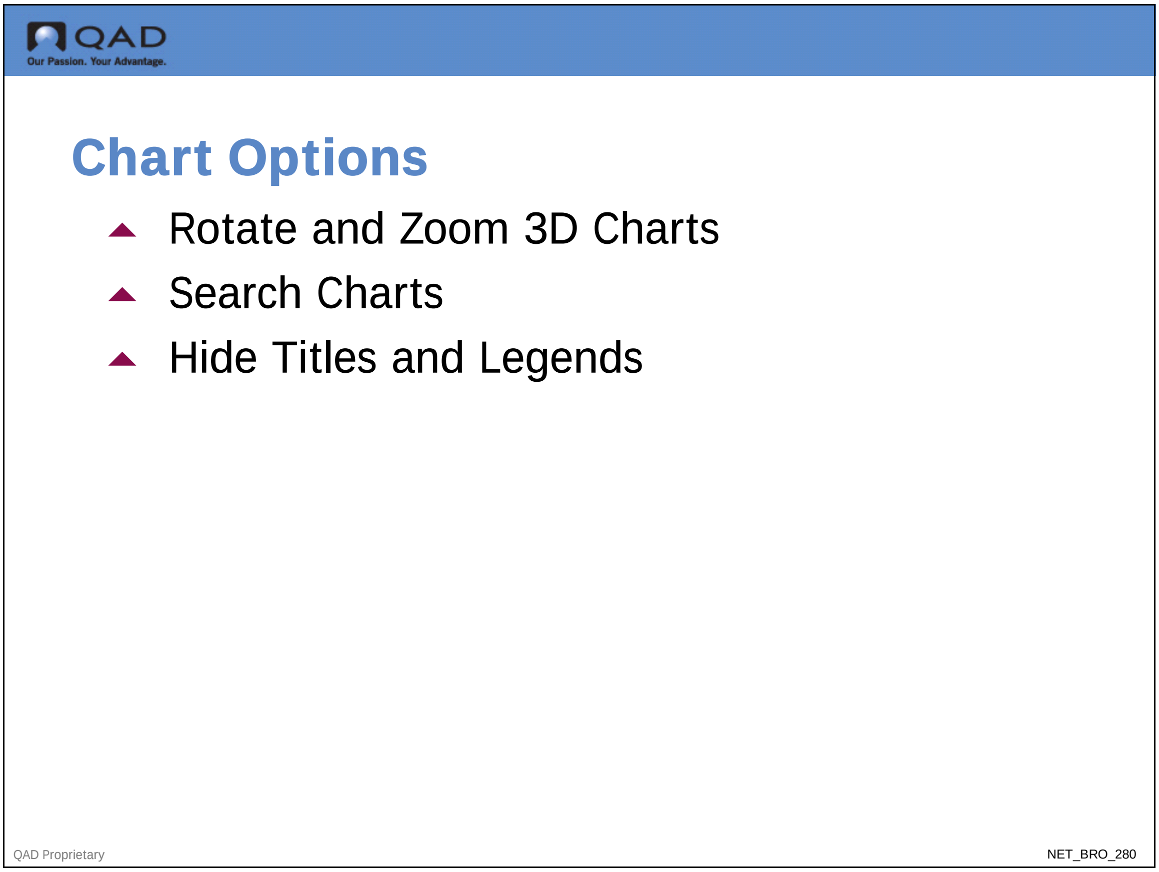


Chart Options

Chart Options

- Launch Chart in New Window.
- Copy Chart to Clipboard
- Edit Chart Design
- Interactive Charting
  - For any item that has a drill-down, a split-screen view of both the chart and the drill-down browse, which can also be displayed as a chart.
  - Click an item in the first chart, to automatically change the view to reflect the changed data for the drill-down. Click an item in the chart to select the associated row in the browse. Conversely, click a row in a browse to select the associated item in the chart

 NET_BRO_290

Summary

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Summary

- Browses let you to display selected data in different formats. You can also display browse data as charts or as operational metrics. Operational metrics can be used to display operational deficiencies in real time.

QAD Proprietary NET_BRO_300

Exercise and Knowledge Check

1 Open up the Sales Order Browse. Highlight any Sales Order and drill down by double-clicking a Sales Order number. In the Sales Order Maintenance screen that appears, click the Sold-To lookup.

2 Go to Supplier Invoice View and display a component-based browse.

3 Use Sales Order Browse and limit the output of the Sales Order Browse to orders for one specific customer.

   What was the filter did you use? What operator did you use? Send the output to an Excel sheet.

4 From the Metrics folder, display the Accounts Receivable metric.

5 Run Excel Integration for Country Browse. Delete a country and re-import the Excel sheet.

6 Run Sales Order Browse and rearrange the columns. Group the results by Sold-To.

7 Use Chart Designer to create a chart for Item Master Browse.

   Label the x axis Product Line and select the variable prod line.

   Label the y axis label Part Number and select the variable item number and group by count.

   Select a 3D pie chart and run the chart.