



QAD Enterprise Applications  
Standard & Enterprise Edition

# Training Guide **QAD .NET UI**

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**QAD Inc.**

100 Innovation Place  
Santa Barbara, California 93108  
Phone (805) 566-6000  
<http://www.qad.com>

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# **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 Browsers

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 browsers 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 also 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



### 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

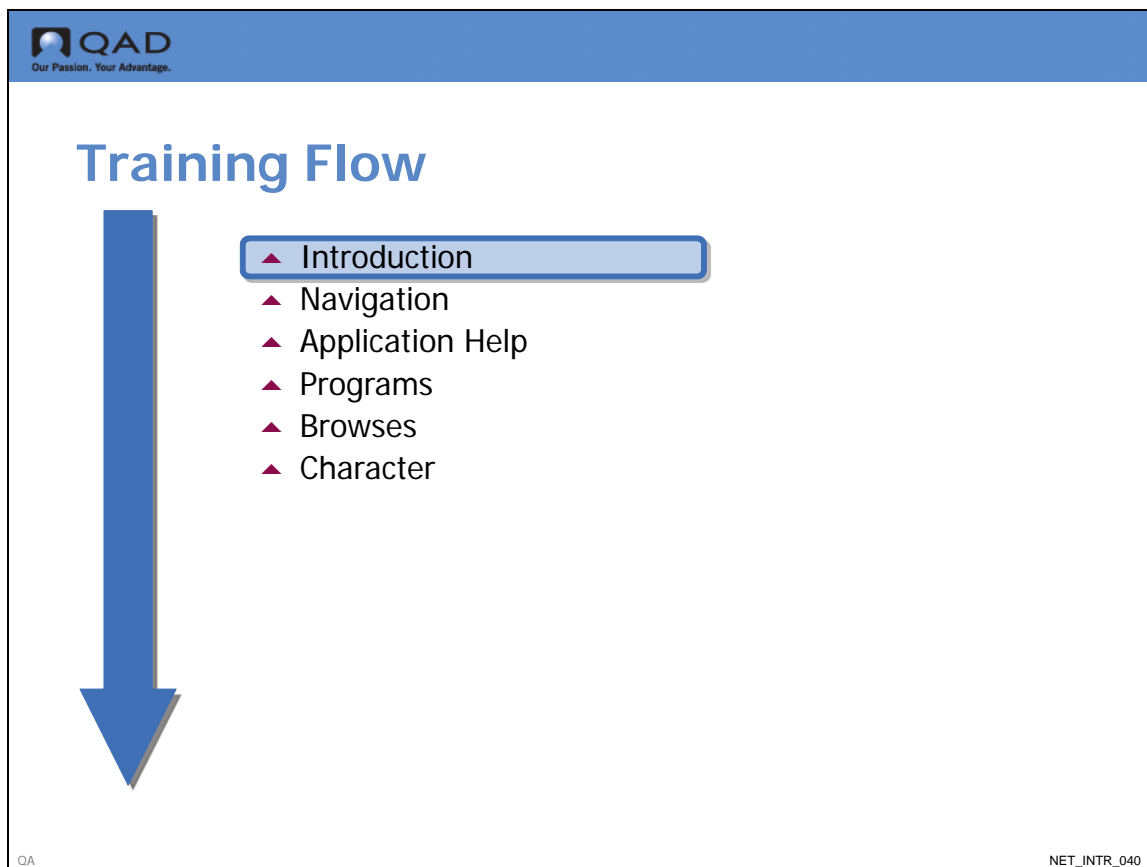
## Benefits



### 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

## Training Flow



The diagram illustrates the training flow. On the left, a large blue arrow points downwards. To the right of the arrow is a list of topics, each preceded by a small red triangle. The first item, 'Introduction', is highlighted with a blue rounded rectangular bar. The other items are 'Navigation', 'Application Help', 'Programs', 'Browses', and 'Character'.

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## Training Flow

- ▲ Introduction
- ▲ Navigation
- ▲ Application Help
- ▲ Programs
- ▲ Browses
- ▲ Character

QA NET\_INTR\_040

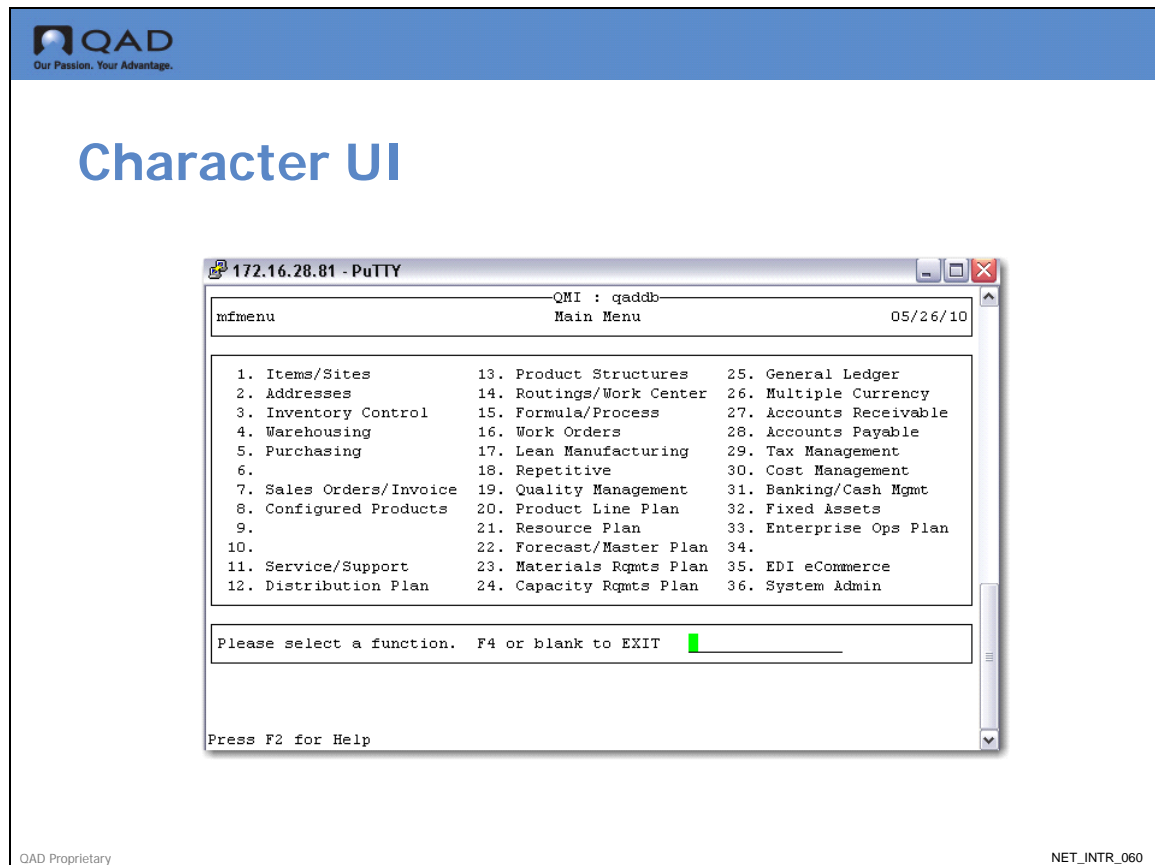
## Introduction



### 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)

## 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

The screenshot shows the QAD .NET UI interface in Terminal Mode. At the top left is the QAD logo with the tagline "Our Passion. Your Advantage." Below the logo is a blue header bar. The main content area has a title "Terminal Mode in the QAD .NET UI" and a window title "Item Master Maintenance x". The interface is divided into three main sections:

- Item Data Section:** Contains fields for "Item Number:" (with a cursor), "Description:", and "Unit of Measure:".
- Item Data Section:** Contains fields for "Prod Line:", "Item Type:", "Drawing:", "Added:", "Status:", "Revision:", "Design Group:", "Group:", "Drawing Loc:", "Size:", and "Promo Group:", "Price Break Category:".
- Item Inventory Data Section:** Contains fields for "ABC Class:", "Average Interval:", "Lot/Serial Control:", "Cycle Count Interval:", "Site:", "Shelf Life:", "Location:", "Allocate Single Lot: No", "Location Type:", "Key Item: No", "Auto Lot Numbers: No", "PO Receipt Status:", "Active: No", "Lot Group:", "WO Receipt Status:", "Active: No", "Article Number:", and "Memo Order Type:".

At the bottom left, it says "QAD Proprietary" and at the bottom right, it says "NET\_INTR\_070".

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



### Attributes of Component-Based Screens

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

## Component-Based QAD .NET UI Screen

The screenshot shows the 'Journal Entry Create' screen in the QAD .NET UI. The interface includes a header with the QAD logo and tagline 'Our Passion. Your Advantage.'. Below the header is a title bar 'Journal Entry Create' and a menu bar with options: 'Go To', 'Actions', 'Tools', 'Attach', 'Print', and 'Preview'. An 'Attachments' section is visible below the menu bar.

The main form area contains several input fields and controls:

- Year:** 2010 04
- Posting Date:** 04/30/2010
- Daybook Code:** 000000000
- Layer Type:** (empty)
- Save As Template:**
- Description:** (empty)
- Template Code:** (empty)
- Replacement:**
- Original Posting Reference:** (empty)
- Sequence Number:** 000000000
- Reversal:**

Below these fields is a table with the following columns: GL Account, GL Description, Sub-Account C, Cost Ce, Description, Trans, TC Debit, TC Credit, and Intercompany Code. The table is currently empty.

At the bottom of the form, there is a 'Currency View' section with a dropdown menu set to 'Transaction Currency' and two input fields for 'Total TC', both containing '0.00'. Below this are three buttons: 'Save and Create', 'Save', and 'Close'.

The footer of the screen contains the text 'QAD Proprietary' on the left and 'NET\_INTR\_090' on the right.

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

## Attributes of Non-Component Based Screens



### Attributes of Non-Component Based Screens

- ▲ A rendering of the Character UI for the .NET UI
- ▲ Similar tabbing and keyboard navigation
- ▲ Screen navigation bar for some non-component based screens
  - Enabled in Tools|Options

QAD Proprietary

NET\_INTR\_100

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

## Non-Component Based QAD .NET UI Screen

The screenshot displays a web-based interface for 'Sales Order Maintenance'. At the top left is the QAD logo with the tagline 'Our Passion. Your Advantage.'. The main title 'Non-Component Based Screen' is prominently displayed in blue. Below the title is a browser-style menu bar with options: 'Go To', 'Actions', 'Copy', 'Print', 'Preview', and 'Attach'. A search bar labeled 'Sales Order:' and 'Order:' is present. The interface is divided into sections: 'Header' (with sub-tabs for 'Header', 'Details', 'Tax Info', 'Freight Data', 'Salesperson', 'Delivery', 'Consignment', and 'Comments'), and 'Details'. The 'Header' section includes fields for 'Order:', 'Sold-To:', 'Bill To:', and 'Ship-To:'. The 'Details' section contains various fields with checkboxes: 'Order Date:', 'Required Date:', 'Promise Date:', 'Due Date:', 'Perform Date:', 'Line Pricing: ', 'Manual:', 'Daybook Set:', 'Channel:', 'Project:', 'Confirmed: ', 'Currency:', 'Taxable: ', 'Language:', 'Fixed Price: ', and 'Credit Terms:'. The footer contains 'QAD Proprietary' on the left and 'NET\_INTR\_110' on the right.

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

## 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



### Chapter Objectives

- ▲ Learn about the different ways of navigating in the QAD .NET UI.


## Benefits




### Chapter Benefits

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

## Training Flow



### Training Flow

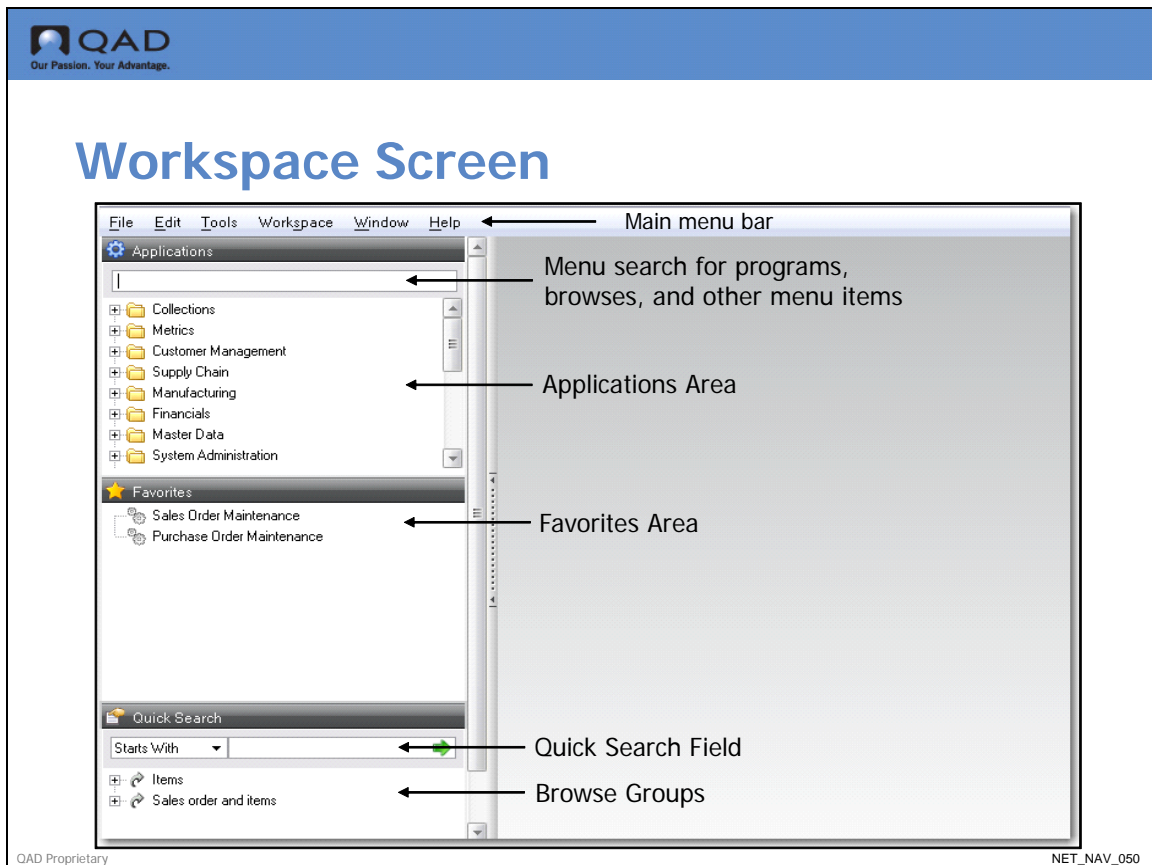


- ▲ Introduction
- ▲ **Navigation**
- ▲ Application Help
- ▲ Program Types
- ▲ Browses
- ▲ Character UI

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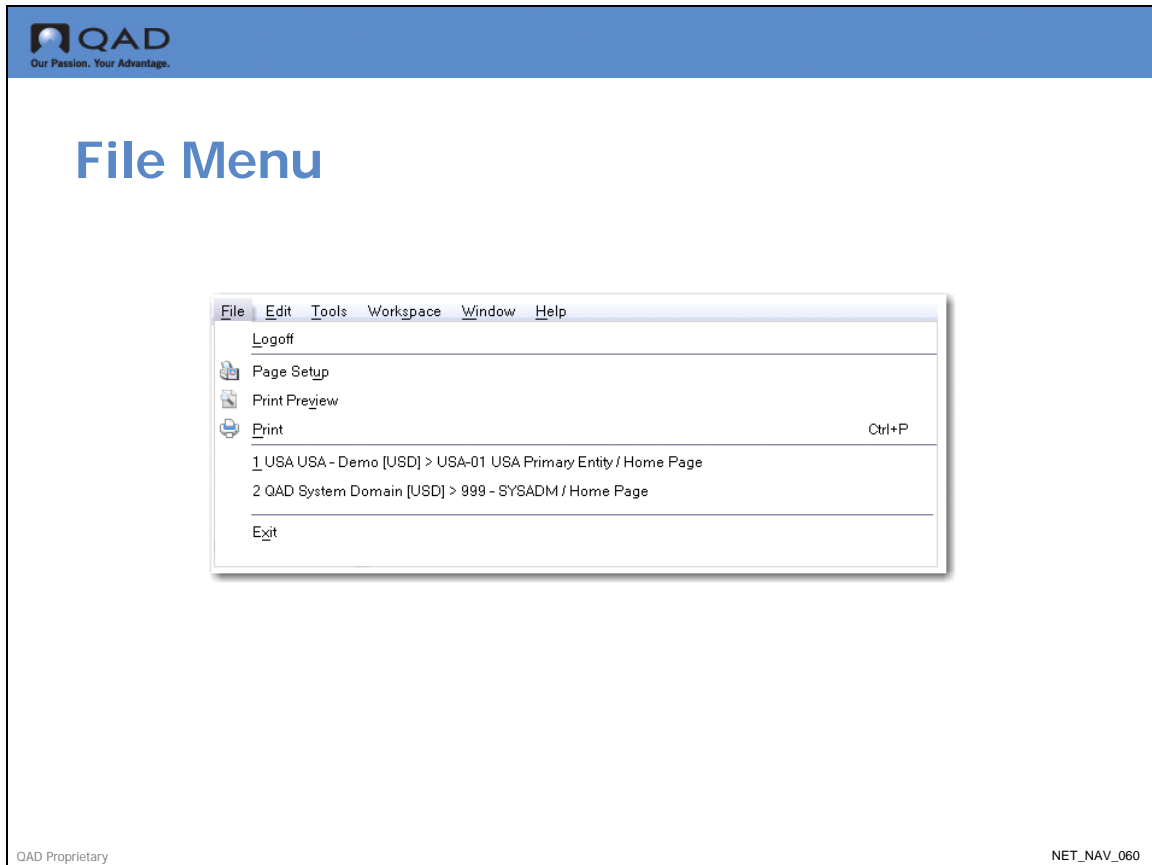
## Workspace Screen



### 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 frequently 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.

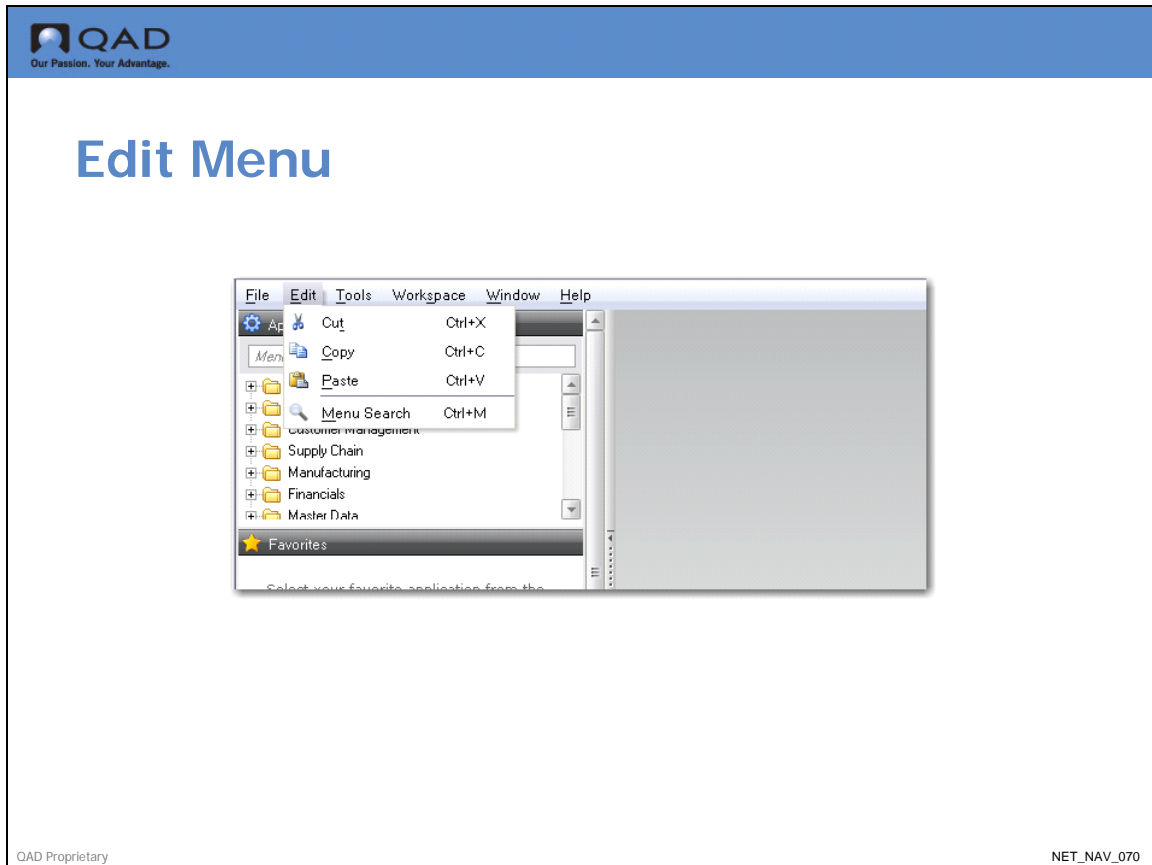
## File Menu



The File menu commands include:

- Logoff/Login. Log off from all applications running in the QAD .NETUI. You can login as a separate user if security allows.
- Page Setup. Defines print output for browses. This has no impact on maintenance 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.

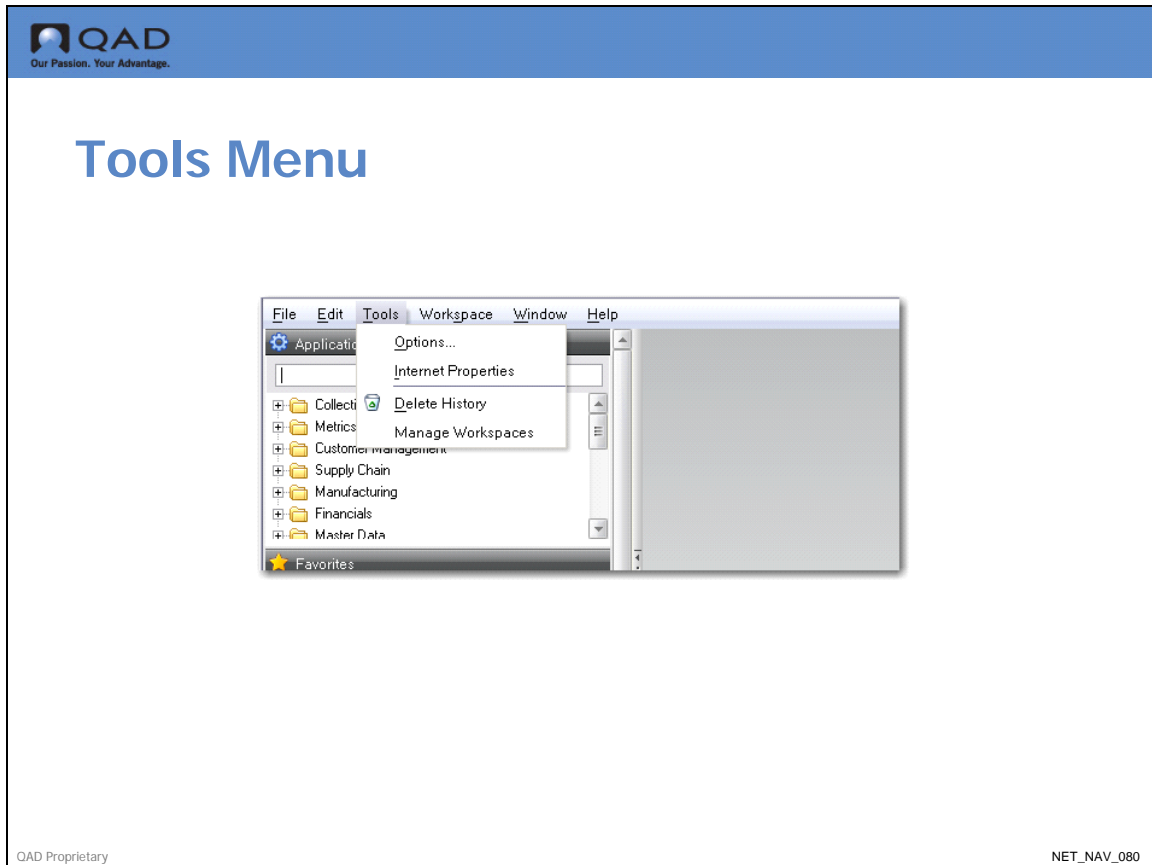
## Edit Menu



The Edit menu commands include:

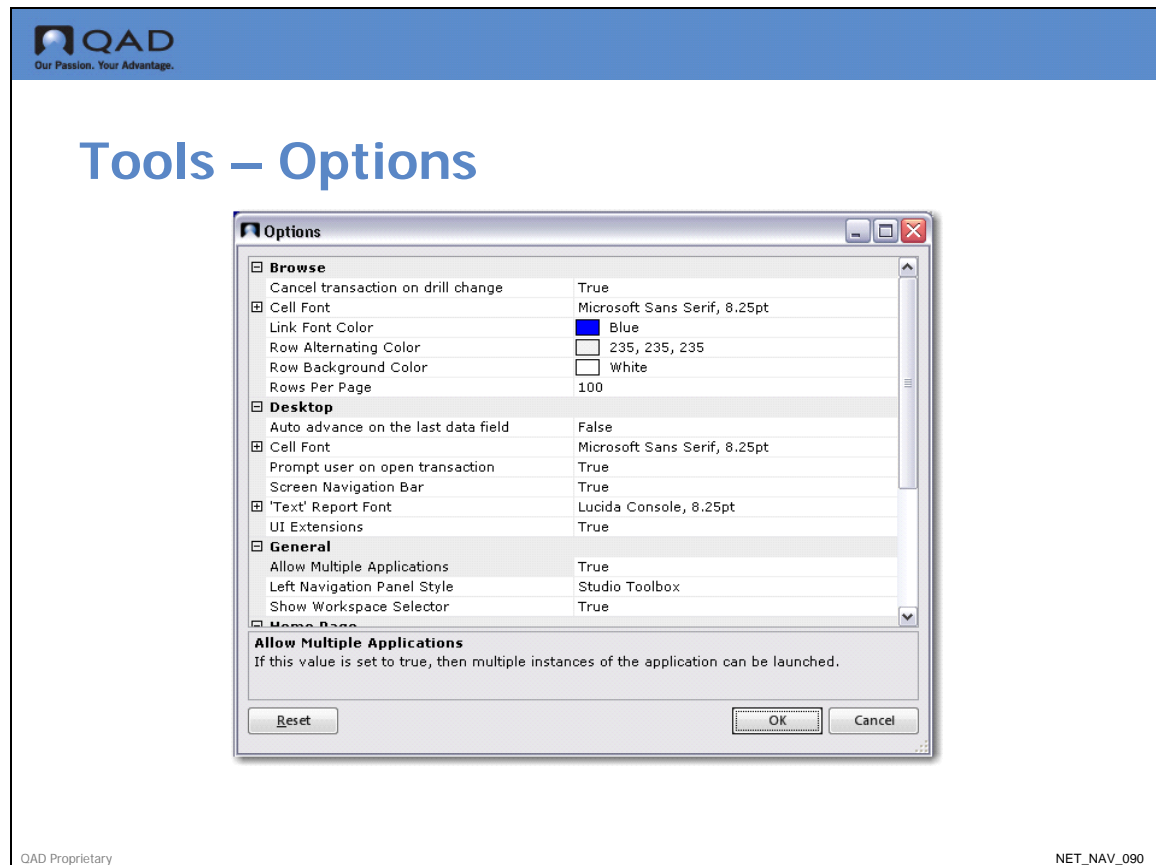
- Cut, Copy, and Paste. These are standard Microsoft commands. View associated shortcuts on the screen above.
- Menu Search. While In any screen you can immediately go to Menus search by using the shortcut Ctrl + M or select menu search.

## 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

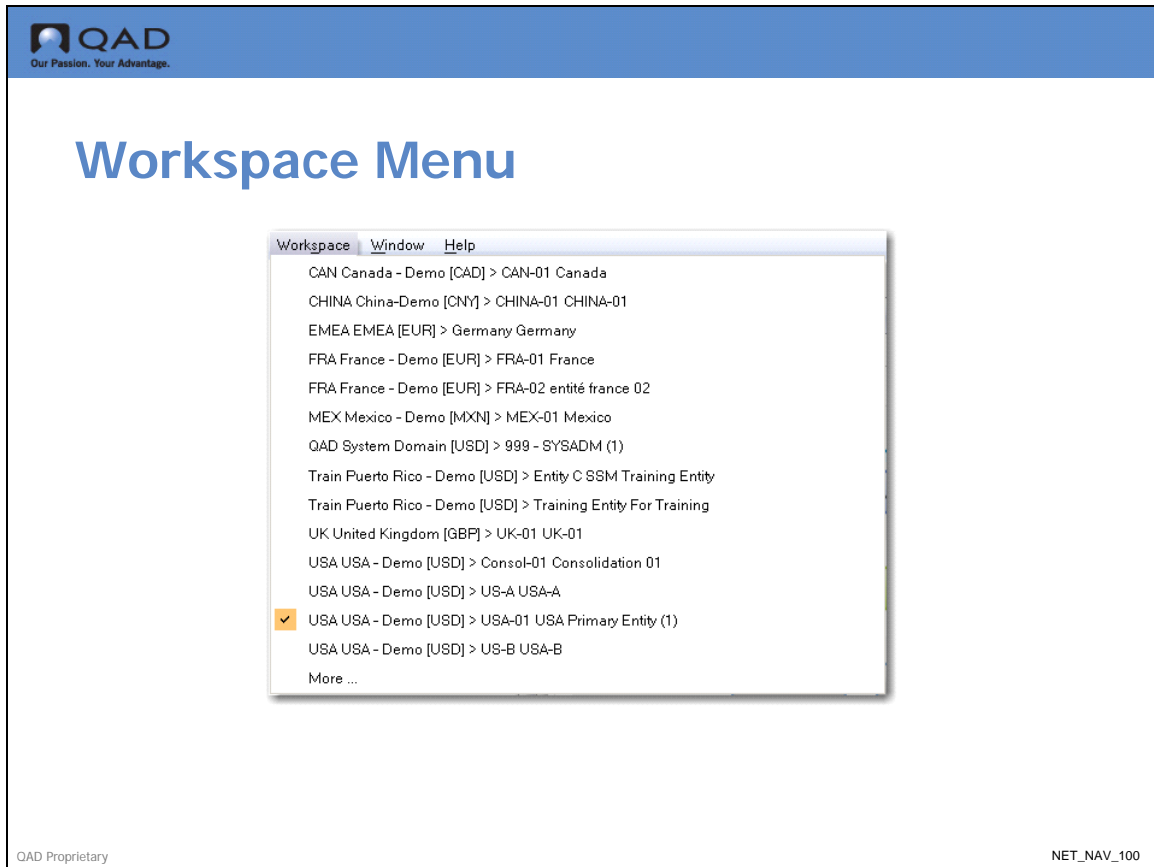


### Field Descriptions

- **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 true 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 Bar. 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.

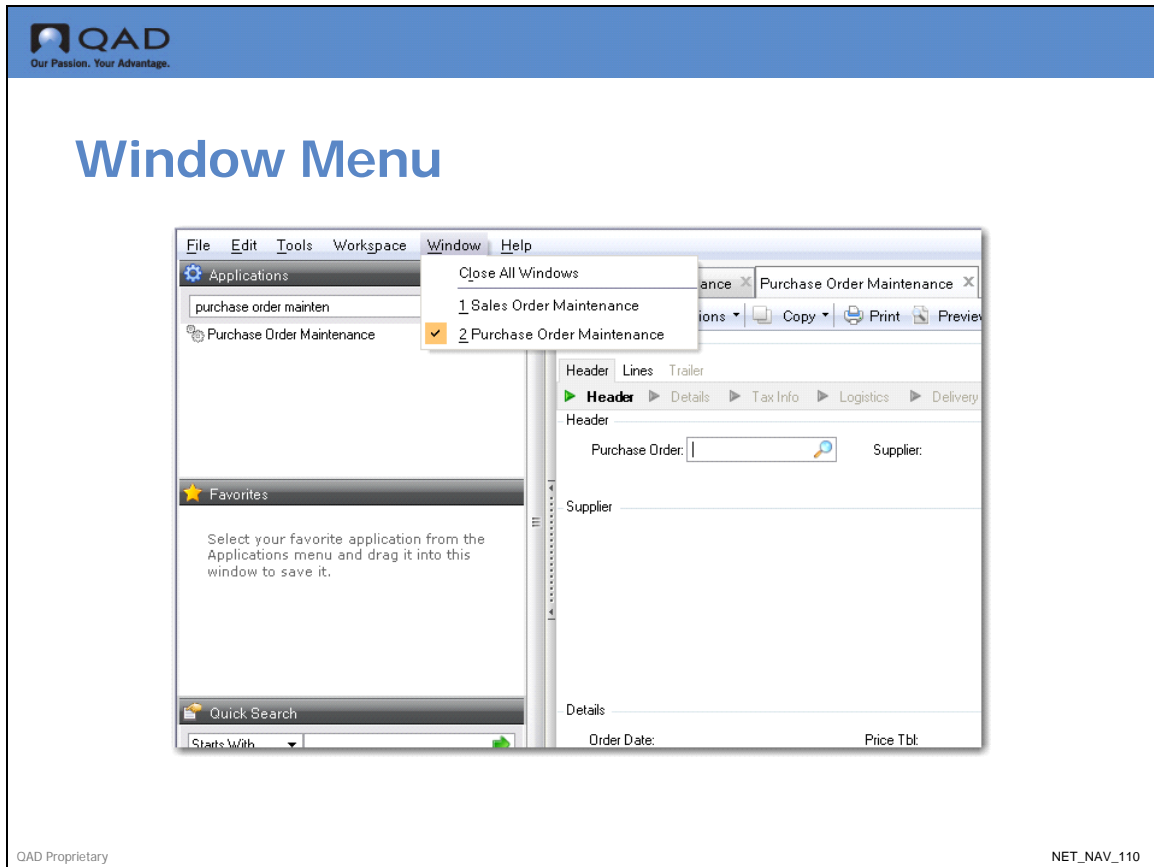
## Workspace Menu



Manage Workspaces. Activate and deactivate workspaces from a list

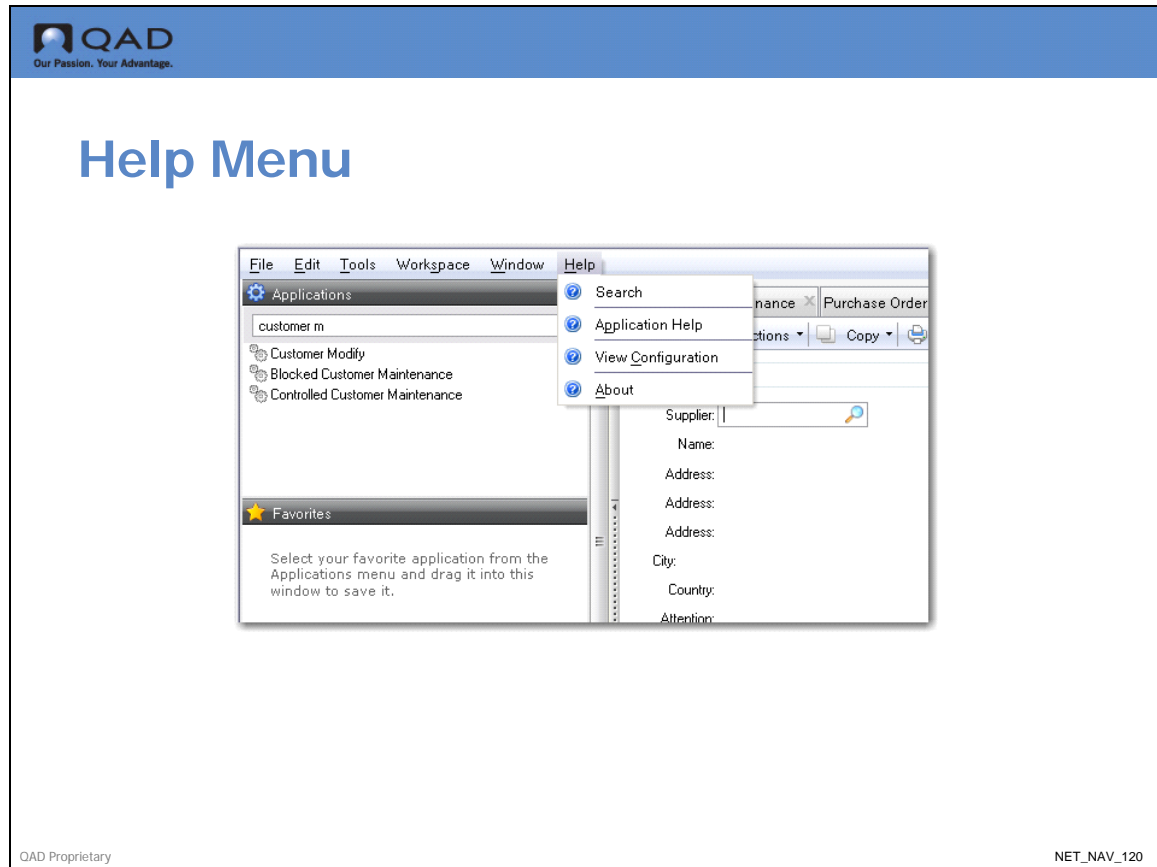
- A workspace typically represents a domain. When you exit the QAD NET UI, the active workspace is saved and displays when you log in again. This allows you to change domains by selecting from the list. The check mark signifies the domain that is currently active. You can also change your workspace from 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:

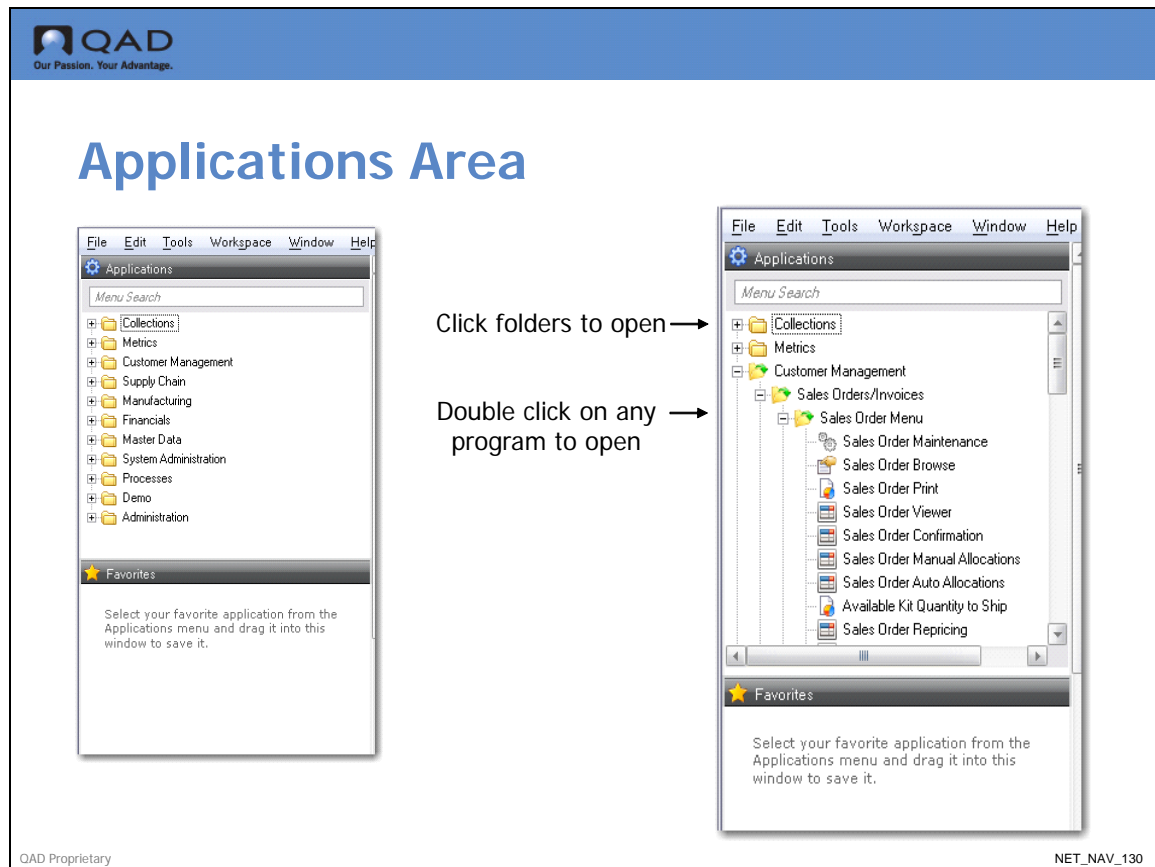
*Search.* This option displays the QAD Assist default search page.

*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



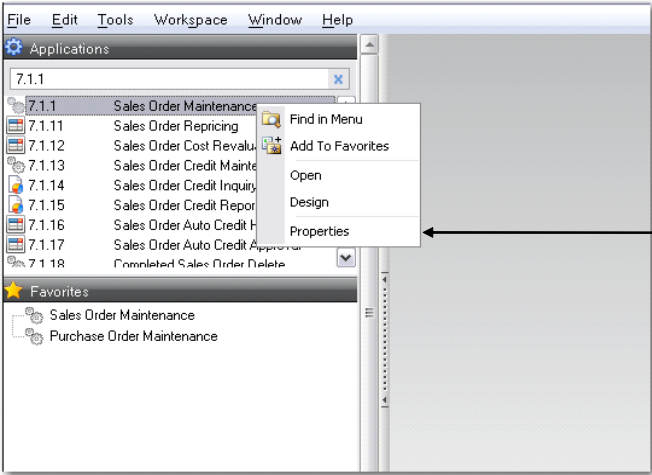
The Applications area displays the menu items for the QAD applications running in the QAD NET UI. When the system is installed, the default menu organization is automatically loaded. Multiple screens can be open at any one time Menu Search

- 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, pptmt.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 screens appear as the typing continues until the proper screen is located. This is called predictive text.

## Program Properties


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# Properties

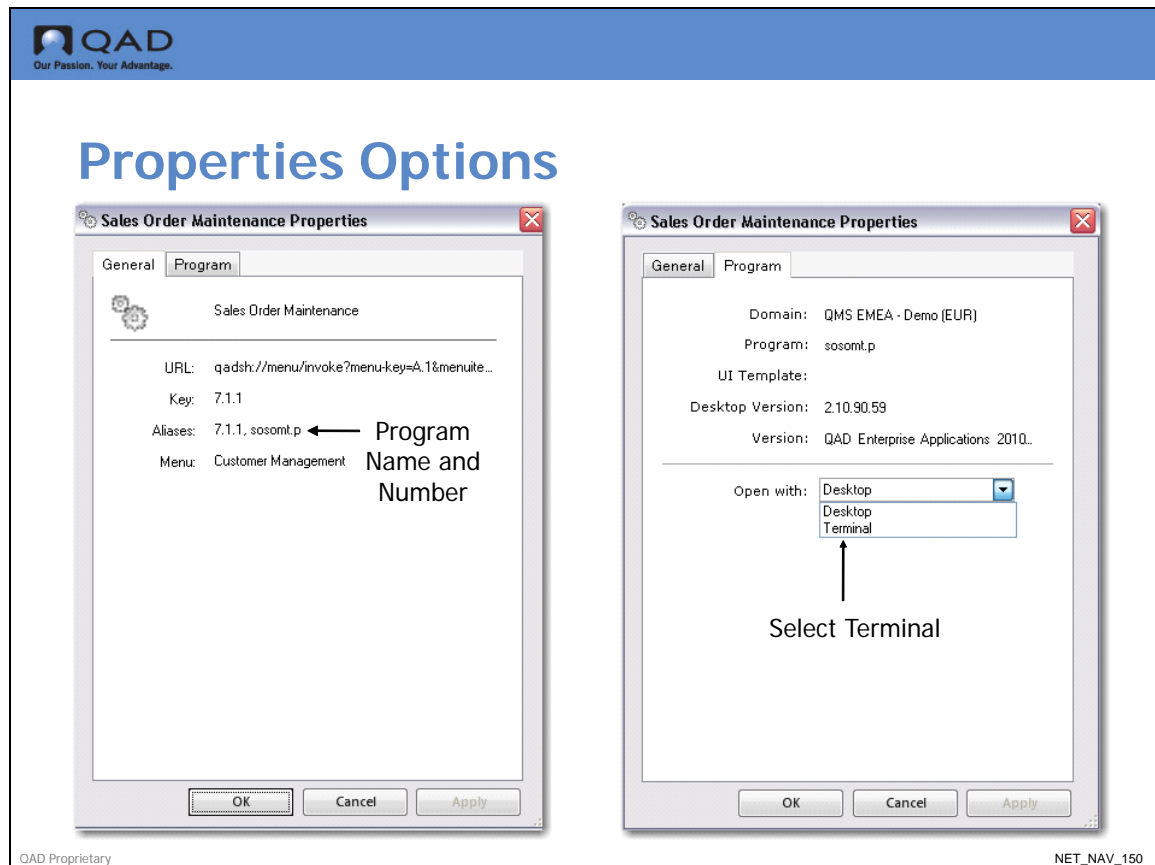


Right-click any program and select properties

QAD Proprietary
NET\_NAV\_140

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


Our Passion. Your Advantage.

## Program Screen in Terminal Mode

Sales Order Maintenance X

Order: <input style="width: 80%;" type="text"/>	Sold-To: <input style="width: 80%;" type="text"/>	Bill To: <input style="width: 80%;" type="text"/>	Ship-To: <input style="width: 80%;" type="text"/>

Order Date:	Line Pricing: No	Confirmed: No
Required Date:	Manual:	Currency: Language:
Promise Date:	Daybook Set:	Taxable: No
Due Date:	Channel:	Fixed Price: No
Perform Date:	Project:	Credit Terms:
Pricing Date:	Org Inv:	Site:
Purchase Order:		Credit Terms Interest %:
Remarks:		Reprice/Edit: No

QAD Proprietary
NET\_NAV\_160

## Program Screen in Desktop (UI) Mode

Sales Order: S010269    Order: S010269    Sold-To: B-CU4000    Bill To: B-CU4000

Header   Lines   Trailer

▶ Lines ▶ **Line Details** ▶ Freight Data ▶ Tax Info ▶ Comments

Header

Order: S010269    Sold-To: B-CU4000    Ln For: Single    Org:

Sales Order Line

Ln	Item Number	Qty Ordered	UM	List Price	Discount	Net Price
1	90-100	1,000.0	LT	100.00	0.0	100.00

Line Details

Desc: Standard Coolant    Sales Acct: 4000    Mech    Mech

Loc:    Site: US-A-1    Disc Acct: 4200    Mech    Mech

USD    Cost: 0.00    Confirmed:     Credit Terms Int: 0.00

Lot/Serial:    Required: 6/10/2010    Ship Type:    UM Conversion: 1.0000

Qty Allocated: 0.0    Promised: 6/10/2010    Consume Fcst:


Qty Picked: 0.0    Due Date: 6/10/2010    Detail Alloc:

Qty Shipped: 0.0    Perform Date:   

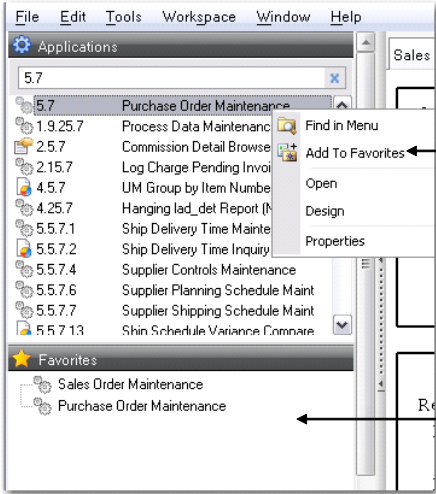
QAD Proprietary    NET\_NAV\_170

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


Our Passion. Your Advantage.

## 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

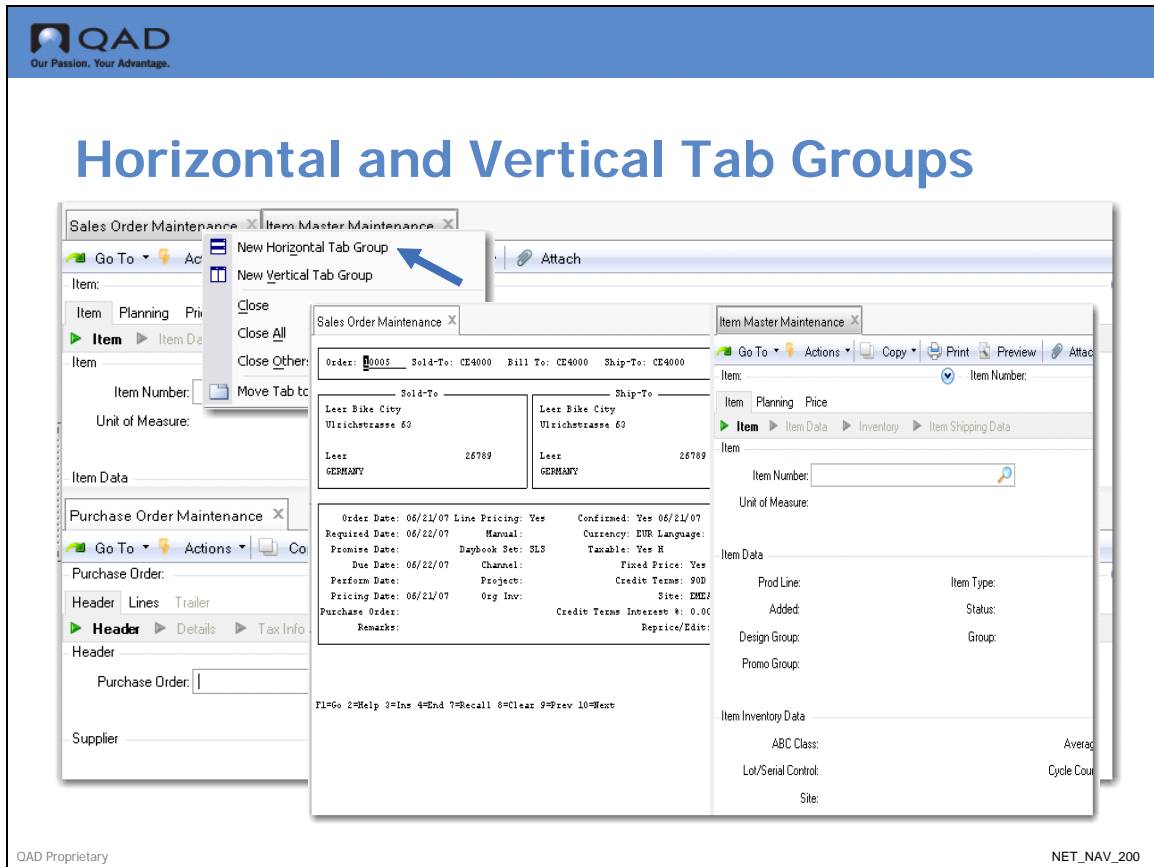
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NET\_NAV\_180

## Switching Domains

The screenshot displays the 'Sales Order Confirmation' window in the QAD .NET UI. The window title is 'Processes | Sales Order Confirmation'. The main area contains a form with fields for 'Sales Order', 'SubTo', 'Customer Class', 'Ship To', 'Order Date', 'Due Date', and 'Site'. There are also 'To' and 'SubTo' dropdown menus. Below the form, there are several checkboxes: 'Allocate' (checked), 'Change Due Dates for ATP Enforcement Warnings', 'Change Due Dates for ATP Enforcement Errors', 'Change Promise Date', and 'Use Standard ATP when APO ATP is Unavailable'. An 'Output' section shows 'Batch ID:'. At the bottom of the window, there is a workspace selector toolbar with five buttons: 'MEA-EMEA-EMEA (Germany)', 'FRA-FRANCE (France)', 'USA-USA (United States)', 'MEX-MEXICO (Mexico)', and 'QAD-QAD (QAD)'. The 'QAD-QAD (QAD)' button is currently selected. The toolbar also shows '999-9754208 (1)'. At the bottom left of the page, it says 'QAD Proprietary' and at the bottom right, it says 'NET\_NAV\_190'.

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

The screenshot displays the QAD .NET UI interface. At the top left is the QAD logo with the tagline "Our Passion. Your Advantage." Below this is a large blue header with the text "Component and Non-Component Based Programs". The main content area shows three overlapping windows. The largest window is titled "Entity Create" and contains a "Menu Search" pane on the left with a tree view of system administration options like "System Administration", "Corporate Structure Setup Menu", "Entity Maintenance", and "Entity Create". The main area of this window has input fields for "Entity Code", "Entity Description", "Business Relation", and "Localization Code", along with tabs for "General", "Shared Sets", "Additional GL Numbering", and "Taxes". To the right of this window is a smaller window titled "Purchase Order Returns" showing a table with columns for "Purchase Order", "Item", "Supplier", and "Status". Below the table are fields for "RTV Nbr", "Ship From", and "Ship To". A third window, titled "AP Exchange", is partially visible behind the others, showing a "Menu Search" pane with a tree view of purchasing options like "Purchasing", "Purchase Requisition Menu", "Supplier Schedules Menu", and "Purchase Order Receipts Menu".

Enterprise Financials and System Administration programs only

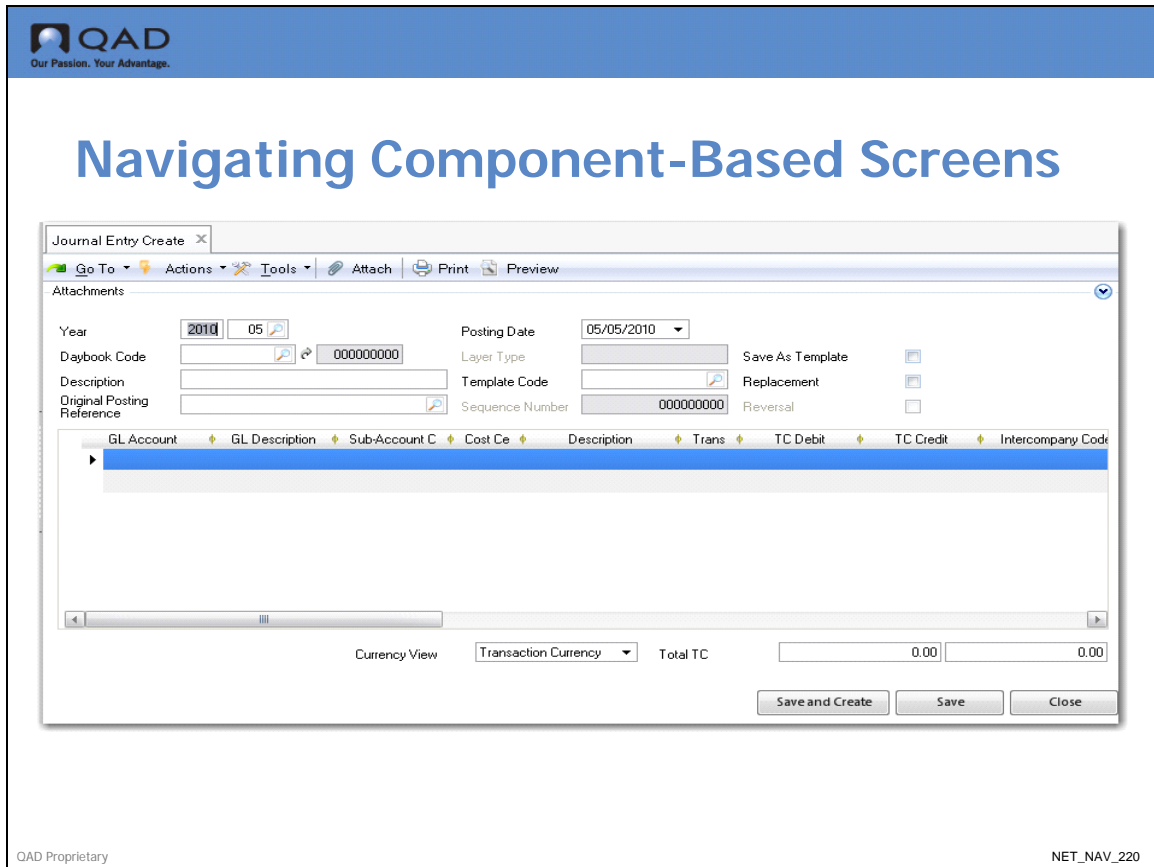
All other programs are non-component based

QAD Proprietary

NET\_NAV\_210

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

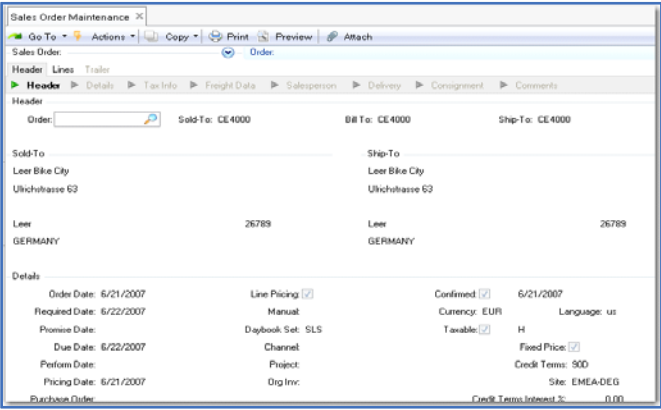


Because the component-based UI is based on Microsoft .NET technology, it incorporates familiar mouse, click and drag, and tabbing functions.

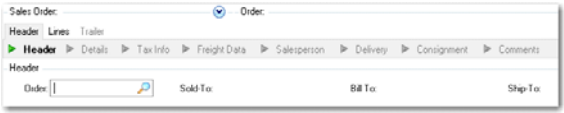
## Navigating Non-Component Based Screens

**QAD**  
Our Passion. Your Advantage.

### Navigating Non-Component Based Programs



Screen Navigation Bar →



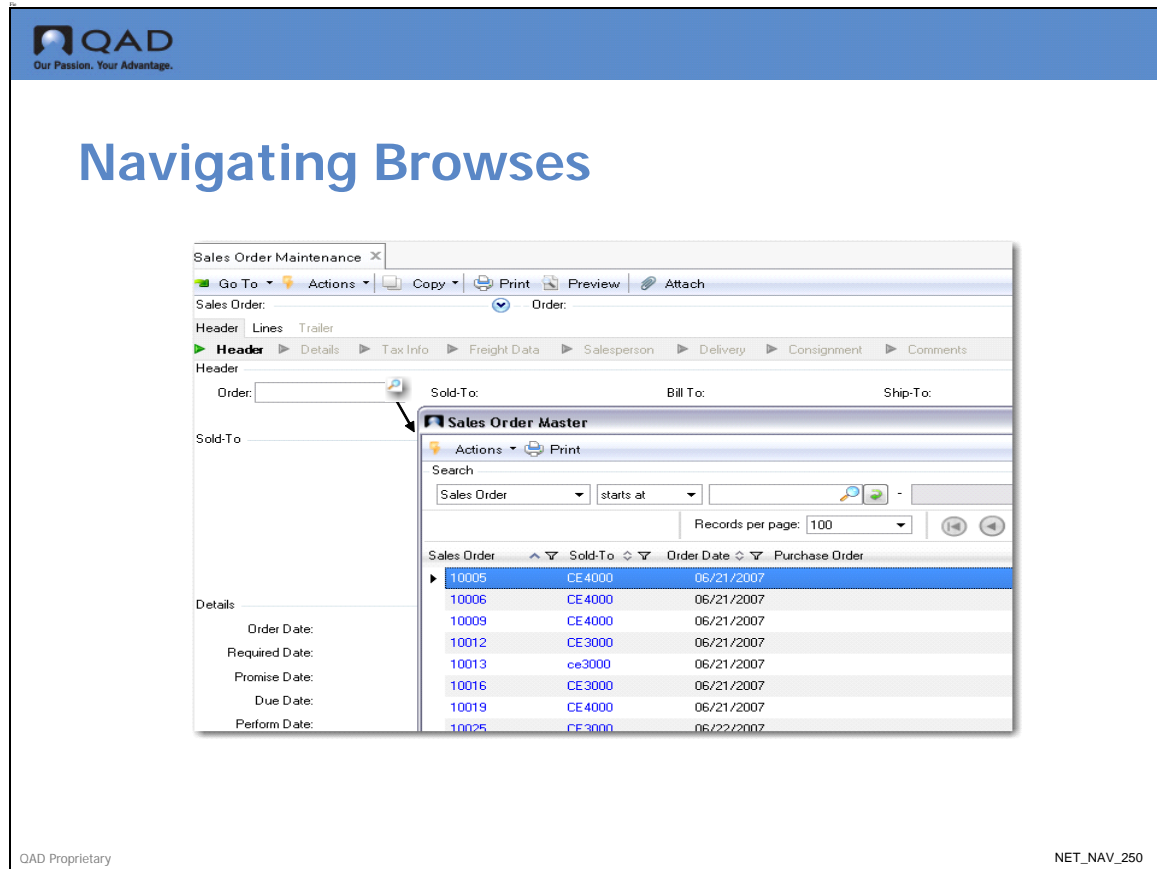
QAD Proprietary
NET\_NAV\_240

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.

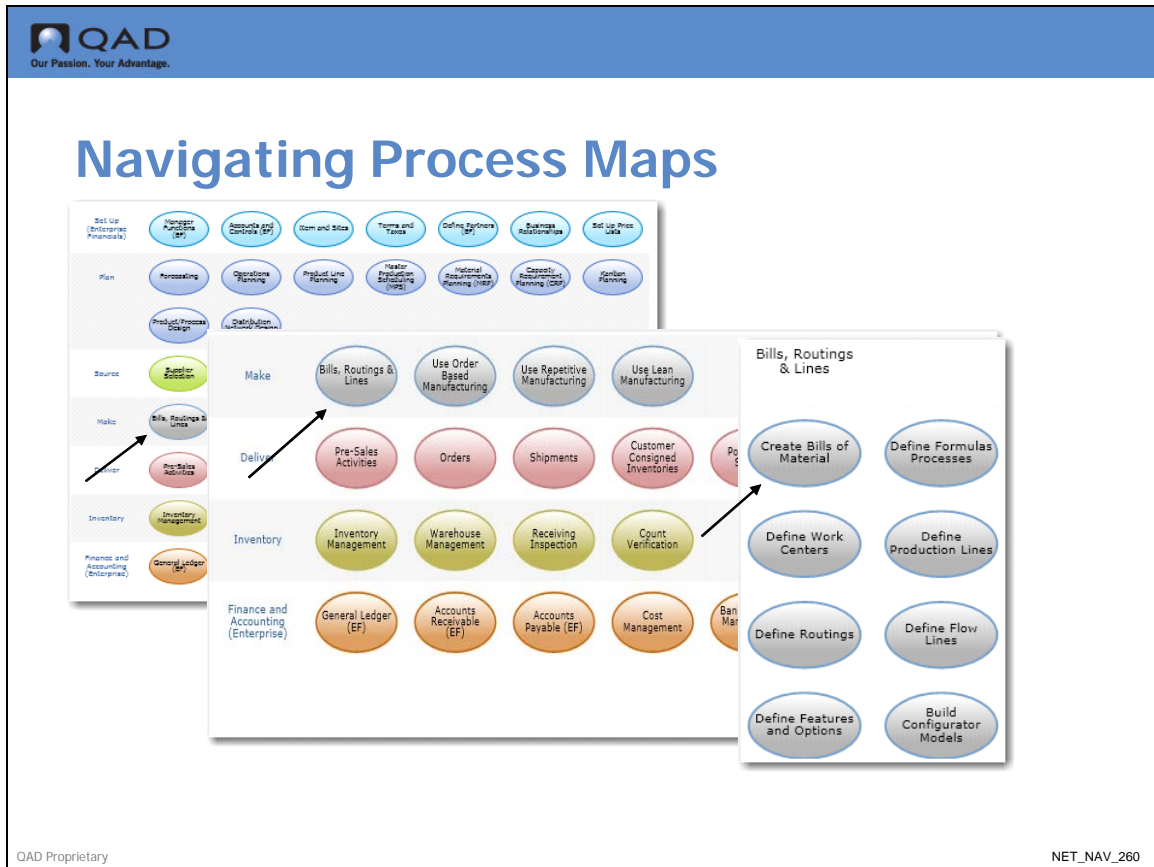
## Navigating Browsers



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

The screenshot displays the QAD .NET UI interface. At the top left is the QAD logo with the tagline "Our Passion. Your Advantage." Below the logo, a breadcrumb trail reads: "Supply Chain Process Model > Accounts and Controls > Set Up General Ledger > Build Chart of Accounts". The main content area is titled "Build Chart of Accounts" and contains a process map diagram. The diagram is organized into two columns: "Build Chart of Accounts" on the left and "Management" on the right. The flow starts with "Format Balance Sheets and Income Statements" in the Management column, which leads to "Format Position Report". From there, it goes to "Account Report" in the Build Chart of Accounts column, then to "Define Accounts" in the Management column, then to "Enter Sub-Accounts" in the Management column, then to "Sub-Account Browse" in the Build Chart of Accounts column, then to "Enter Cost Centers" in the Management column, and finally to "Cost Center Browse" in the Build Chart of Accounts column. There are also horizontal arrows between "Format Position Browse" and "Format Position Report", and between "Account Browse" and "Account Report". On the far left, there are two menu items: "Reports" and "Browses and Inquiries".

QAD Proprietary NET\_NAV\_270

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



### 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

## 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


## Benefits




### Benefits

- ▲ You will be aware of the different types of help and how it can be accessed.

## Training Flow



### Training Flow

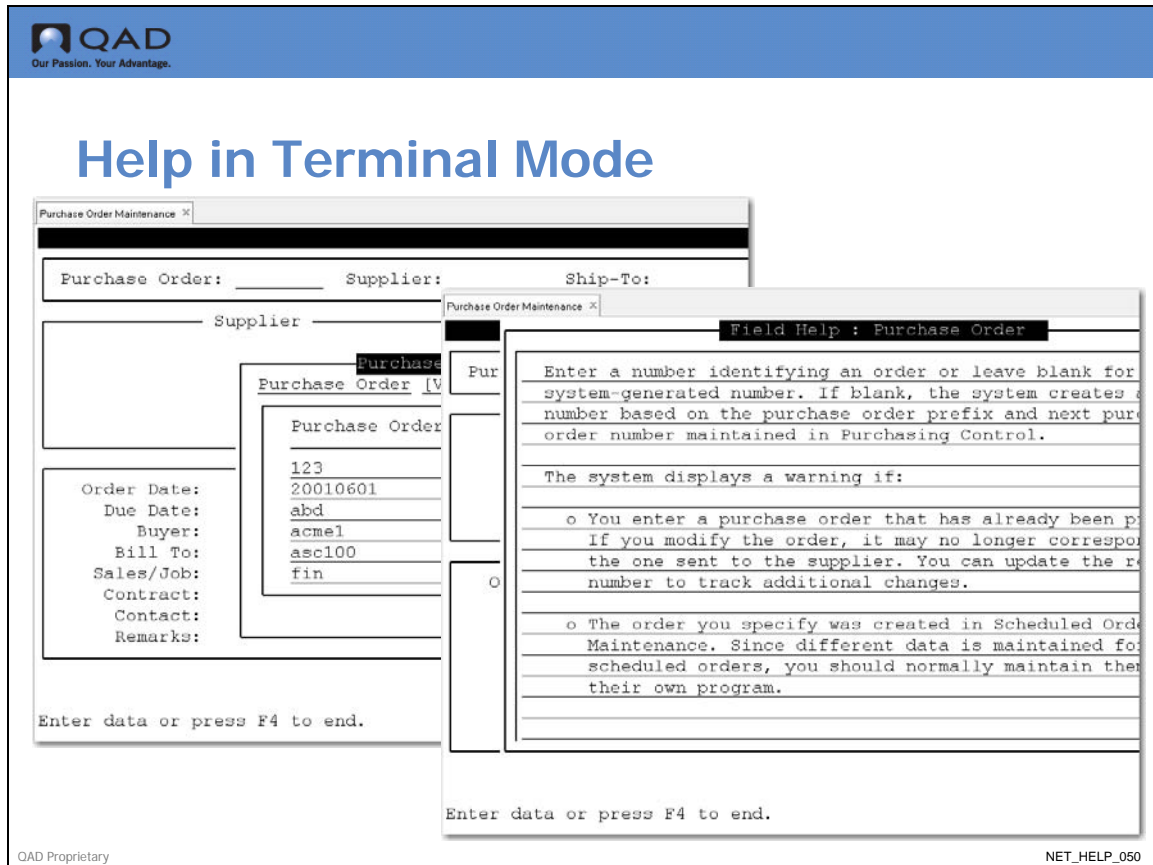


- ▲ Introduction
- ▲ Navigation
- ▲ Application Help
- ▲ Program Types
- ▲ Browses
- ▲ Character Version

QA

NET\_HELP\_040

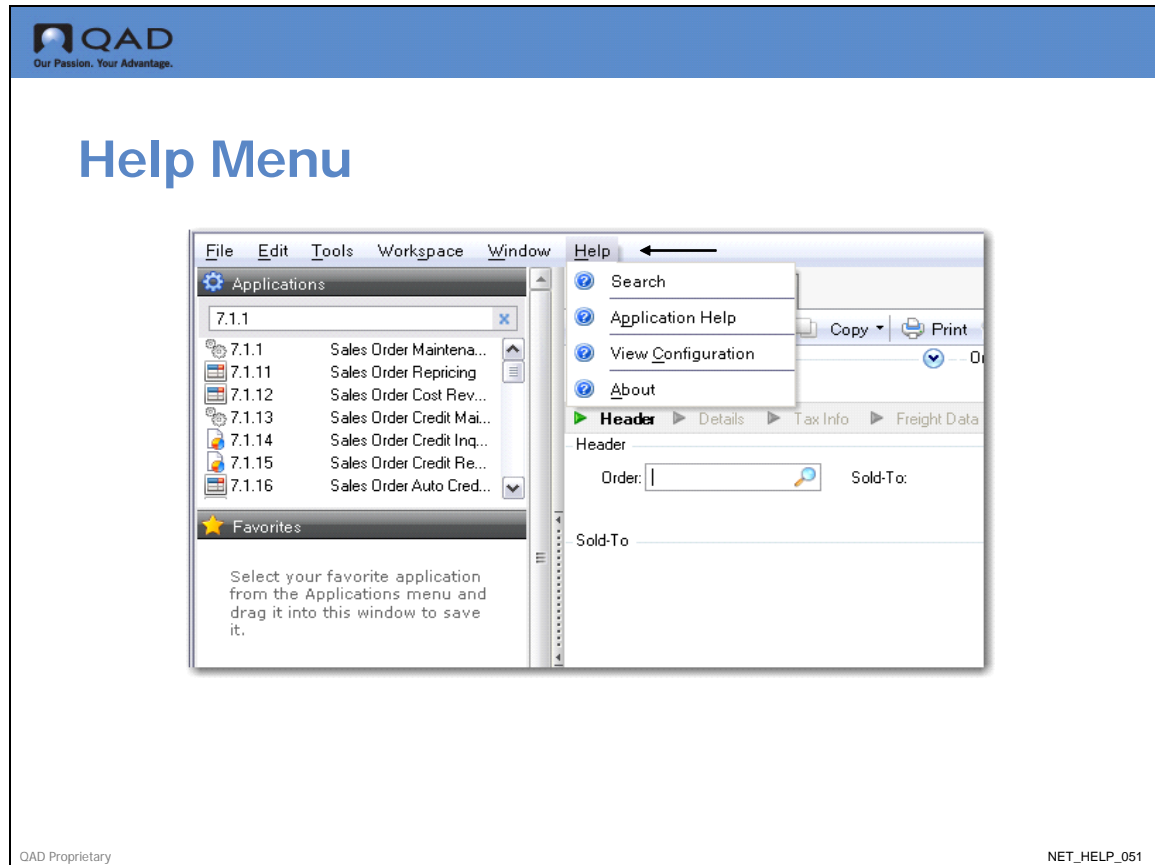
## Help in Terminal Mode



## 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.

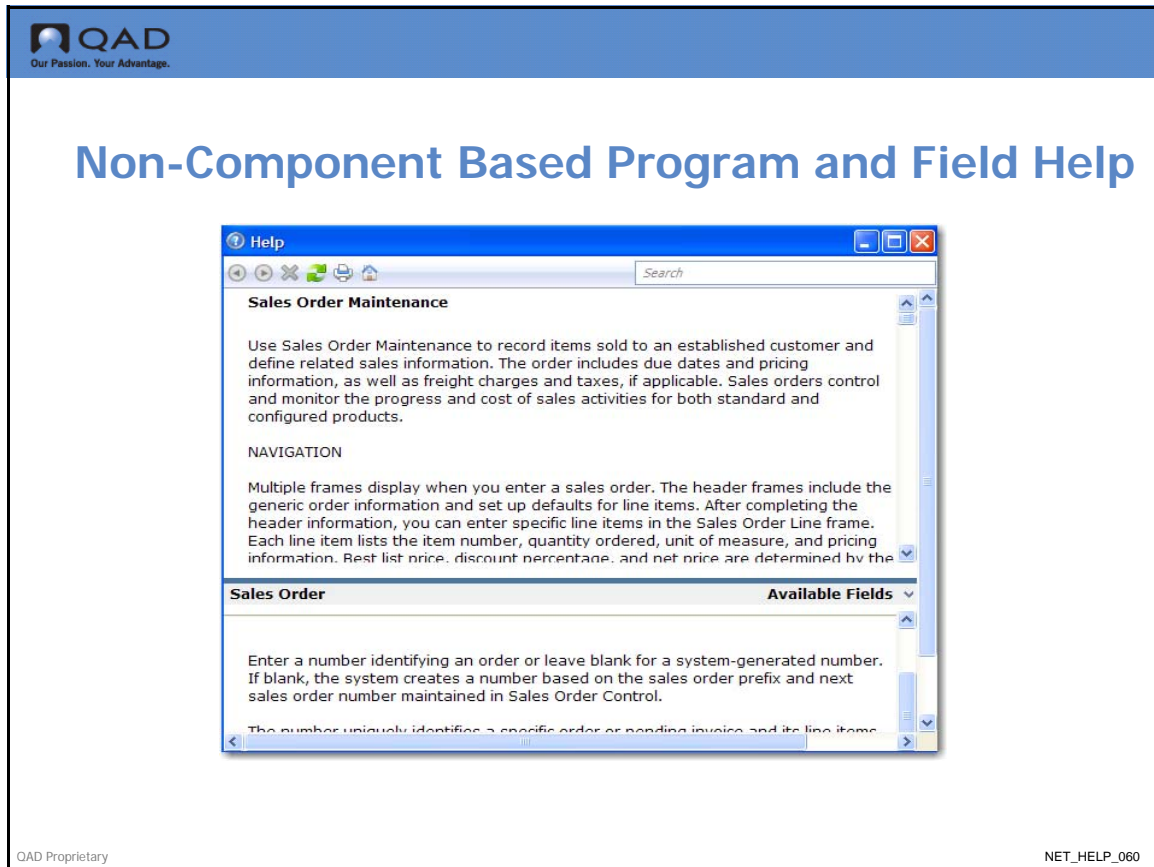
## Help Menu



## 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

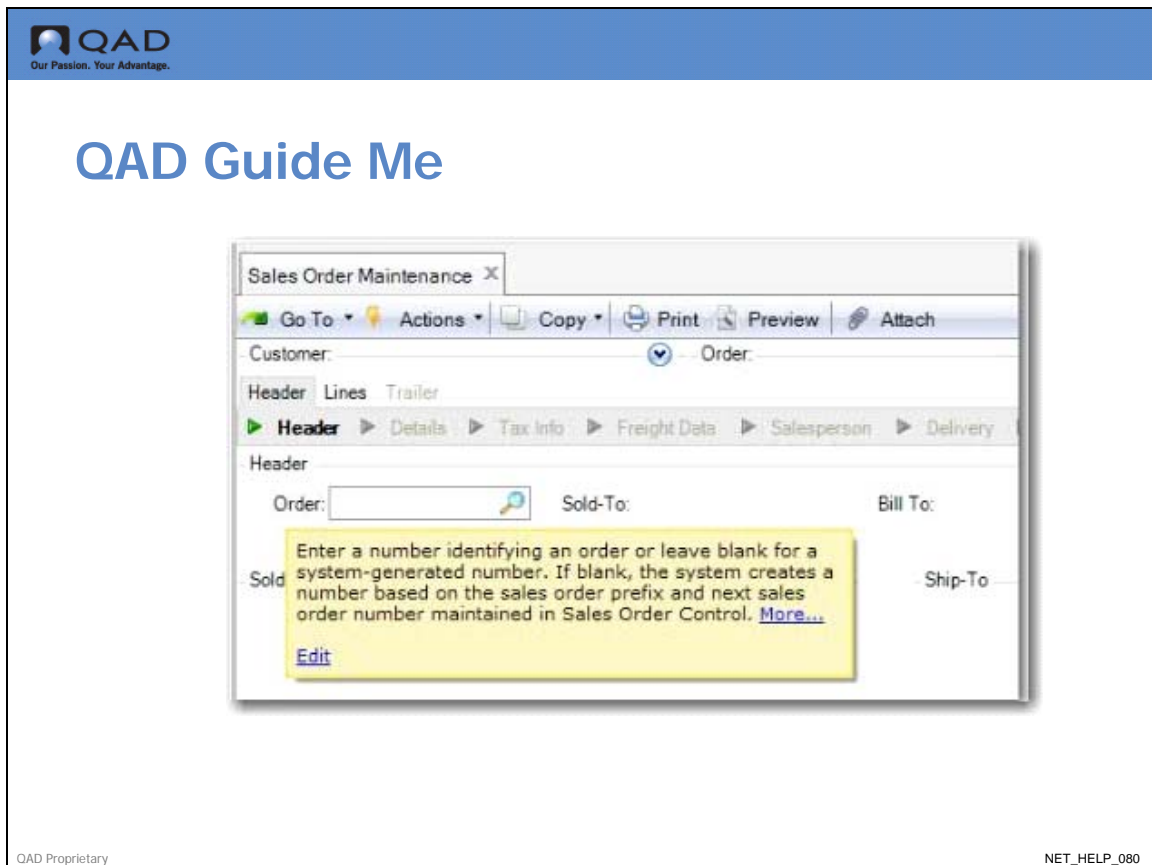
The screenshot shows the QAD .NET UI interface. At the top left is the QAD logo with the tagline "Our Passion. Your Advantage." Below this is a large blue header area with the text "Component-Based Program Help" in white. The main content area is divided into three panels:

- Left Panel:** A sidebar for the "Journal Entry Create" screen. It includes fields for "Year", "Daybook Code", "Description", "Original Posting Reference", and "GL Account".
- Center Panel:** A help window titled "Journal Entry" with a search bar and navigation buttons (TOC, <, >, Index). The content includes:
  - Journal Entry:** A paragraph explaining that a journal entry is a basic transaction in accounting, composed of multiple posting lines associated with a GL account and an amount.
  - Usage:** A paragraph stating that the "Journal Entry" activities (25.13.1) are used to create, view, modify, delete, and reverse journal entries.
  - Notes:** A note indicating that only transient journal entries can be modified or deleted.
  - Journal Entry Process Flow:** A flowchart showing the process starting with "Journal Entry Templates", leading to "Create Journal Entry", which then branches into "Journal Entries" (Finance) and "Modify Journal Entry" (via a "Transient" decision diamond).
- Right Panel:** A portion of the "Journal Entry Create" screen showing fields for "Additional GL Numbering Date", "Save As Template", "Replacement", and "Reversal" (with a value of "00000000"). Below these are "TC Debit" and "TC Credit" fields.

At the bottom left of the screenshot is the text "QAD Proprietary" and at the bottom right is "NET\_HELP\_070".

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

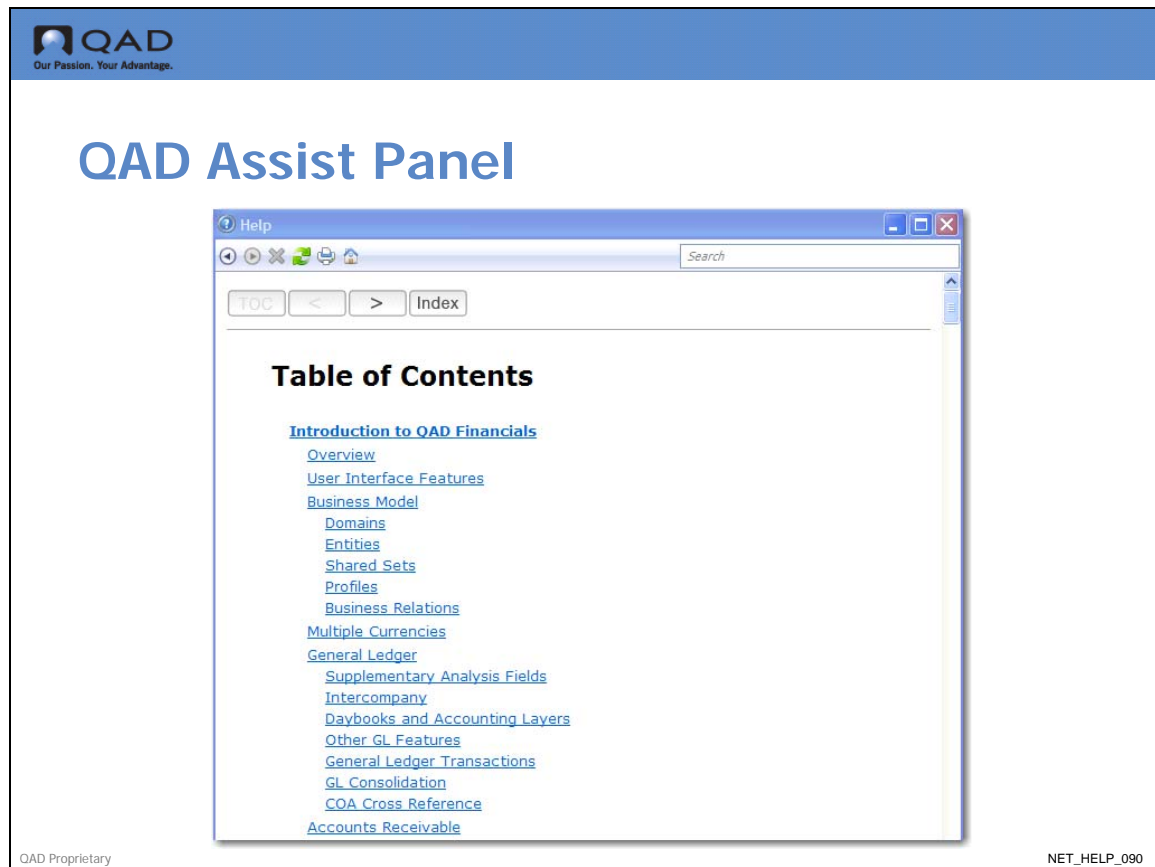


The QAD Guide Me feature provides immediate mouse-over descriptions of fields in both component and non-component programs. The feature is disabled by default.

**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.

## 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.


## Benefits




### Benefits

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

## Training Flow



### Training Flow



- ▲ Introduction
- ▲ Navigation
- ▲ Application Help
- ▲ Program Types
- ▲ Browses
- ▲ Character Version

QA

NET\_PRG\_040

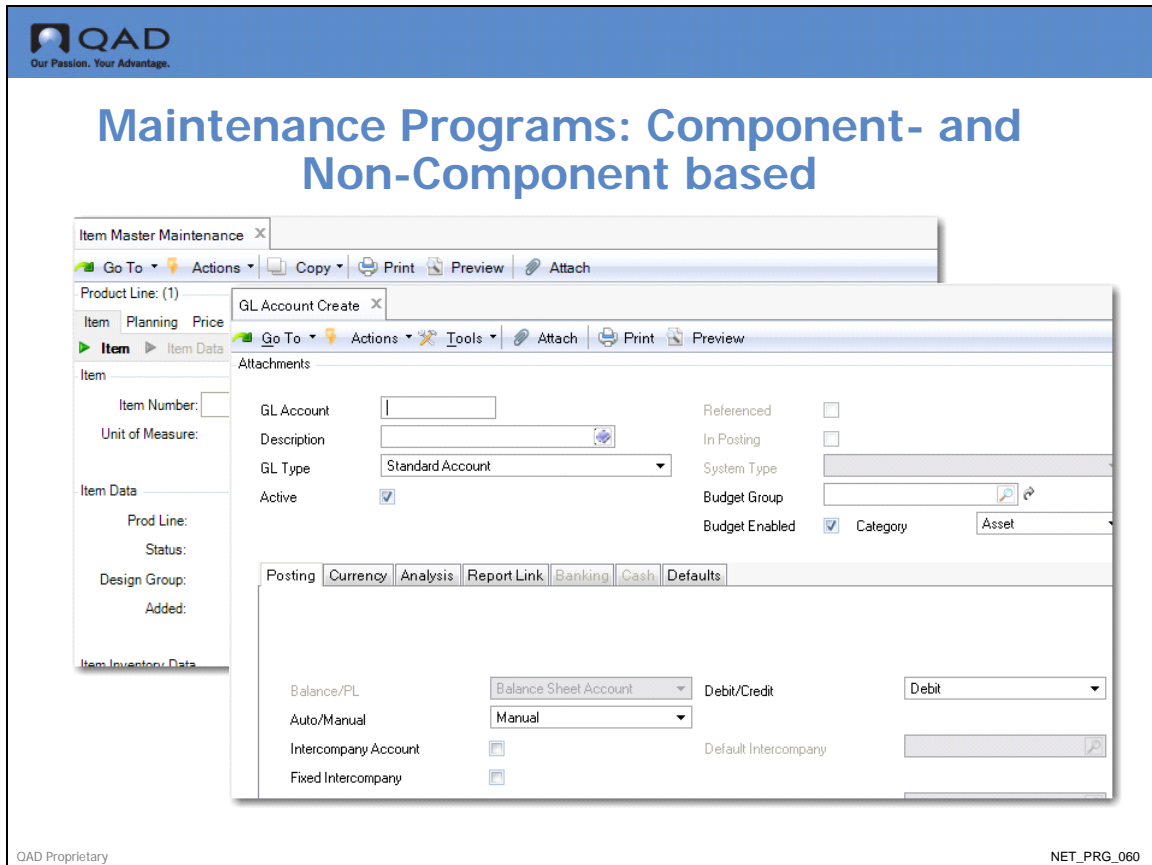
## Program Types



### Program Types

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

## 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

The screenshot shows two overlapping windows from the QAD software. The top window is titled 'Item Master Inquiry - 5/24/2010...' and the bottom window is titled 'Item Cost Report - 5/24/2010 1...'. Both windows display data for 'Ultrasound Mfg Site' (Site 10-10-100) and 'EA Medical Ultrasound' (Line Description 10 Finished Goods).

Site	Description	Line Description	Cost Set	Material	Labor	Burden	Overhead
03/01/10	Current	EA Medical Ultrasound		225.71	19.34	0.28333	0.00
03/01/10	Standard	EA Medical Ultrasound		225.71	19.34	0.28333	0.00
03/01/10	Current	EA Supplies Kit		0.00	0.00	0.00	0.00
03/01/10	Standard	EA Supplies Kit		0.00	0.00	0.00	0.00
03/01/10	Current	EA Implantable Ultrasound		144.81516	25.09176	0.36372	0.00
03/01/10	Standard	EA Implantable Ultrasound		144.81516	25.09176	0.36372	0.00

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

The screenshot displays the QAD Component-Based Report interface. At the top, the QAD logo and tagline 'Our Passion. Your Advantage.' are visible. The main title 'Component-Based Report' is prominently displayed. Below this, a window titled 'GL Account List' is shown. The window includes a 'Report Variants' dropdown set to 'FACTORYDEFAULT', a 'Filter' section with 'GL Account' and input fields for '05000' and '2900001', and a 'Server Output Processing' button. The central part of the window features a table with the following data:

GL Account	COA Element	TySys	Type	Debit/Credit	Balance/P&L	Auto/Manual	Analysis Type
05000	STANDARD			DEBIT	BALANCE	MANUAL	None
05600	STANDARD			DEBIT	BALANCE	MANUAL	None
05610	SYSTEM		RESULTCURRENTYEAR	CREDIT	BALANCE	AUTOMATIC	None
05620	SYSTEM		RESULTPREVIOUSYEAR	CREDIT	BALANCE	AUTOMATIC	None
09000	STANDARD			CREDIT	BALANCE	MANUAL	None
09100	STANDARD			CREDIT	BALANCE	MANUAL	None
10000	DEBTORCONTROL			DEBIT	BALANCE	AUTOMATIC	None
10100	DEBTORDOCUMEN			DEBIT	BALANCE	AUTOMATIC	None
10200	OPENITEM			DEBIT	BALANCE	MANUAL	None
10500	DEBTORCONTROL			DEBIT	BALANCE	AUTOMATIC	None
10600	DEBTORDOCUMEN			DEBIT	BALANCE	AUTOMATIC	None
11300	STANDARD			DEBIT	BALANCE	MANUAL	None
12200	BANK			DEBIT	BALANCE	MANUAL	None
12201	BANK			DEBIT	BALANCE	MANUAL	None
13000	STANDARD			DEBIT	BALANCE	MANUAL	None

At the bottom left of the screenshot, it says 'QAD Proprietary' and at the bottom right, 'NET\_PRG\_080e'.

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

The screenshot displays the 'Journal Entry Create' window in the QAD .NET UI. The window is titled 'Journal Entry Create' and shows the following fields and values:

- Year: 2010
- Posting Date: 05/24/2010
- Daybook Code: JE
- Description: Journal Entry
- Sequence Number: 000000000
- Layer Type: OFFICIAL
- Save As Template: (checkbox)
- Replacement: (checkbox)
- Reversal: (checkbox)

Below the fields is a table with the following data:

GL Account	Sub-Account C	Cost Ce	Description	Trans Curr	TC Debit	TC Credit
1100			Expense	USD	1,000.00	0.00
▶ 4800	Gserv		Expense	USD	0.00	1,000.00

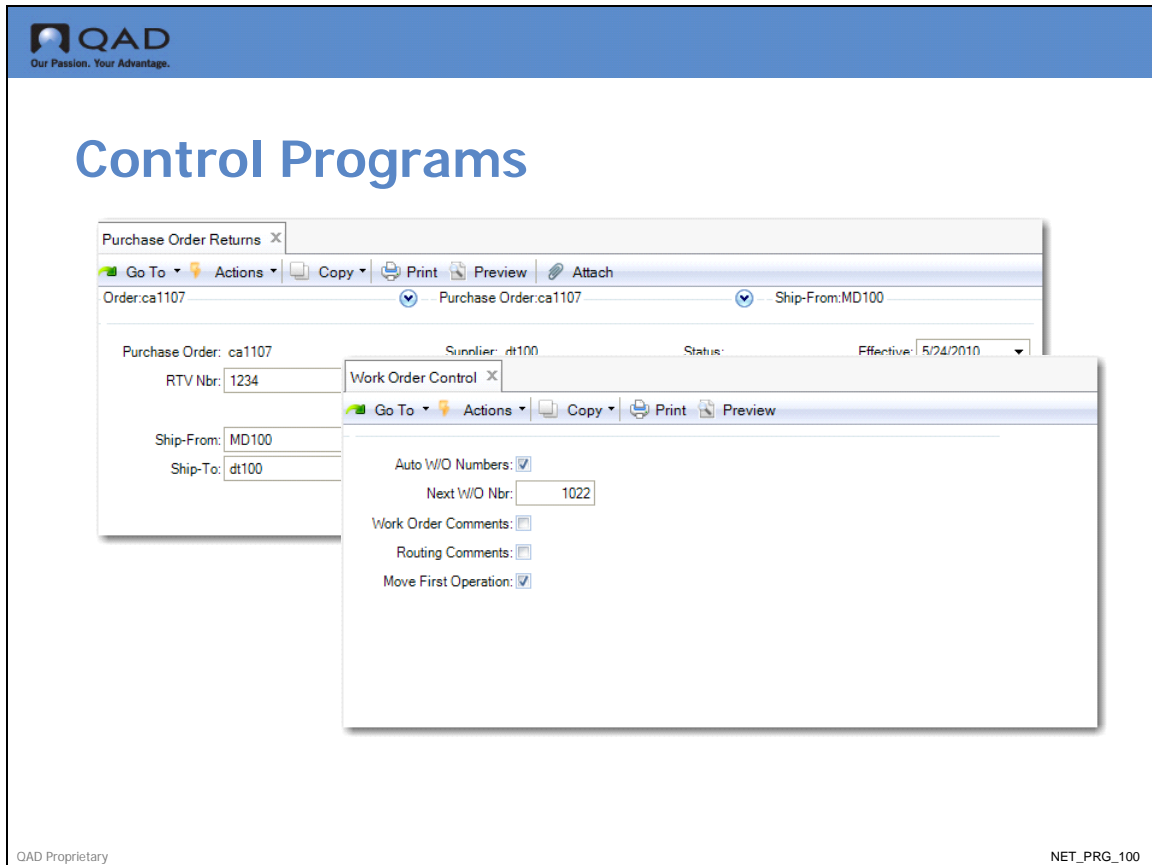
QAD Proprietary

NET\_PRG\_090

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.

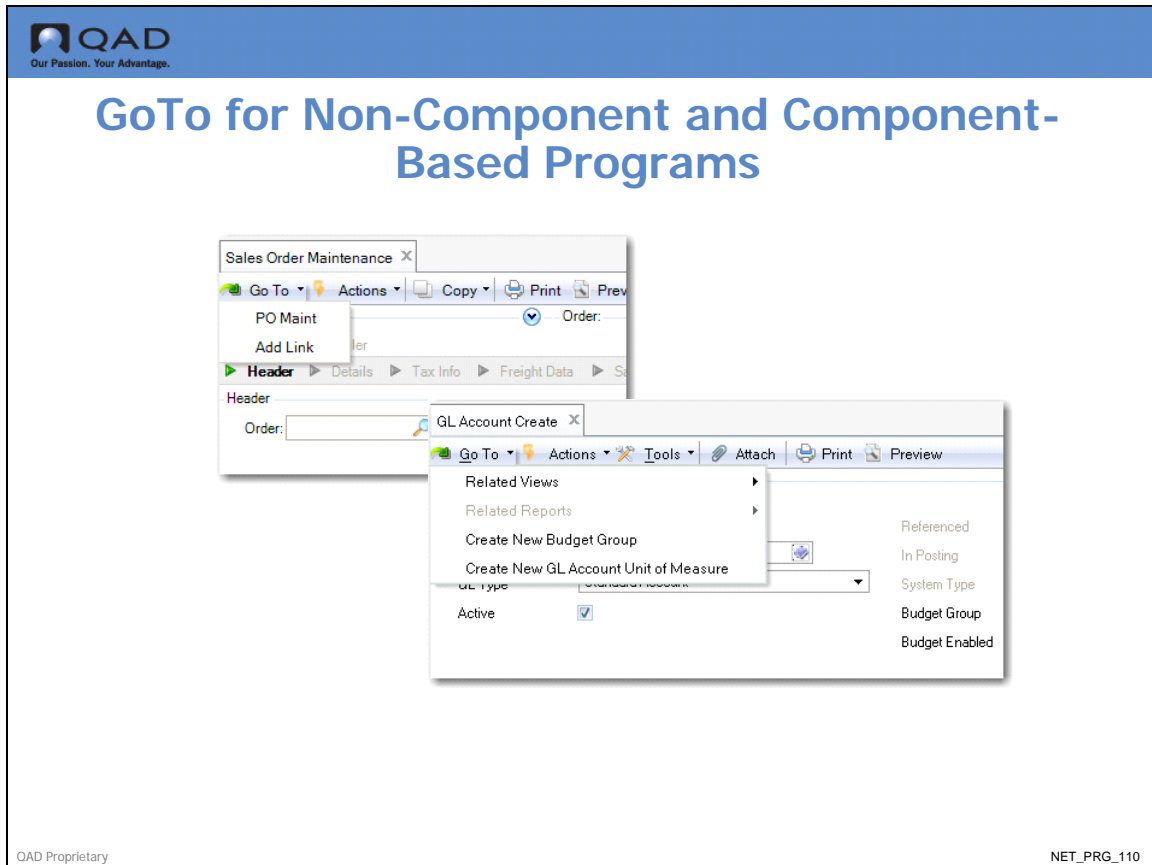
## Control Programs



### 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

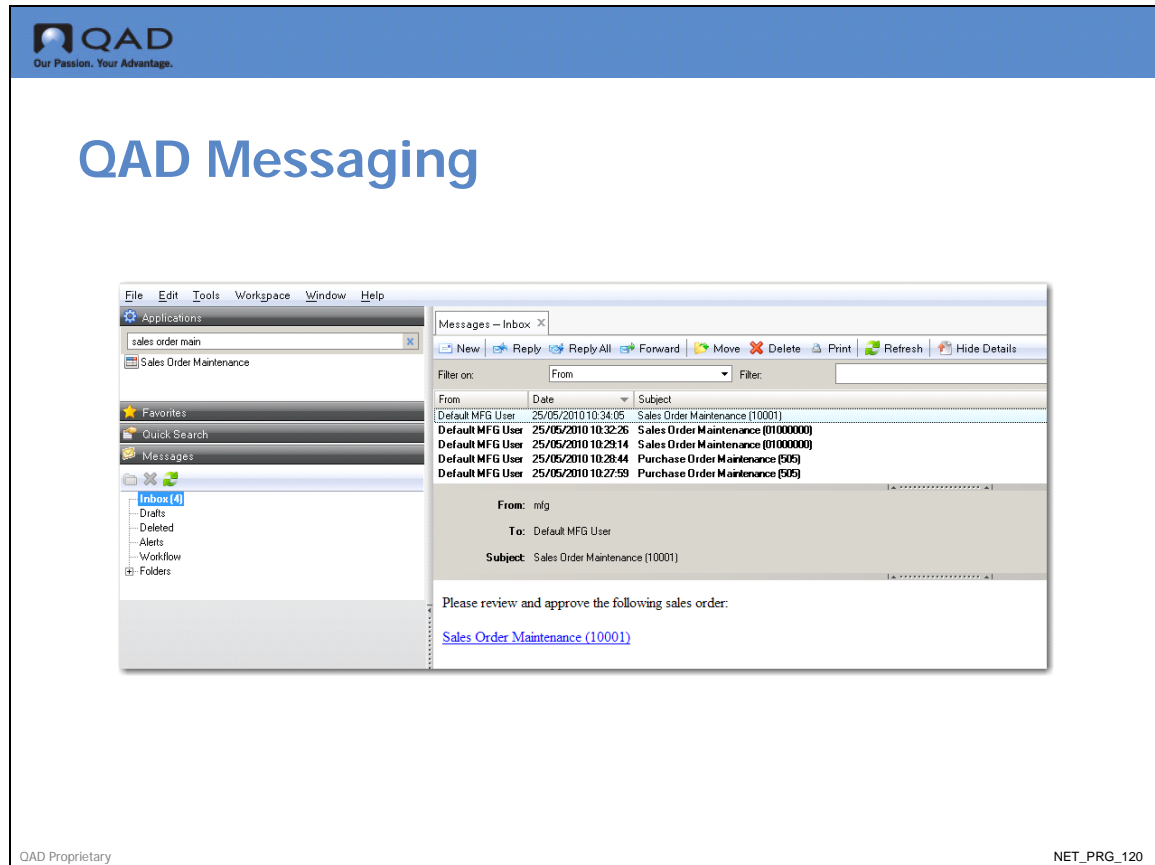
The GoTo option for component-based programs displays GoTo options and Related Views. Related Views are commonly used views and reports that apply to the record you are currently working with.

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

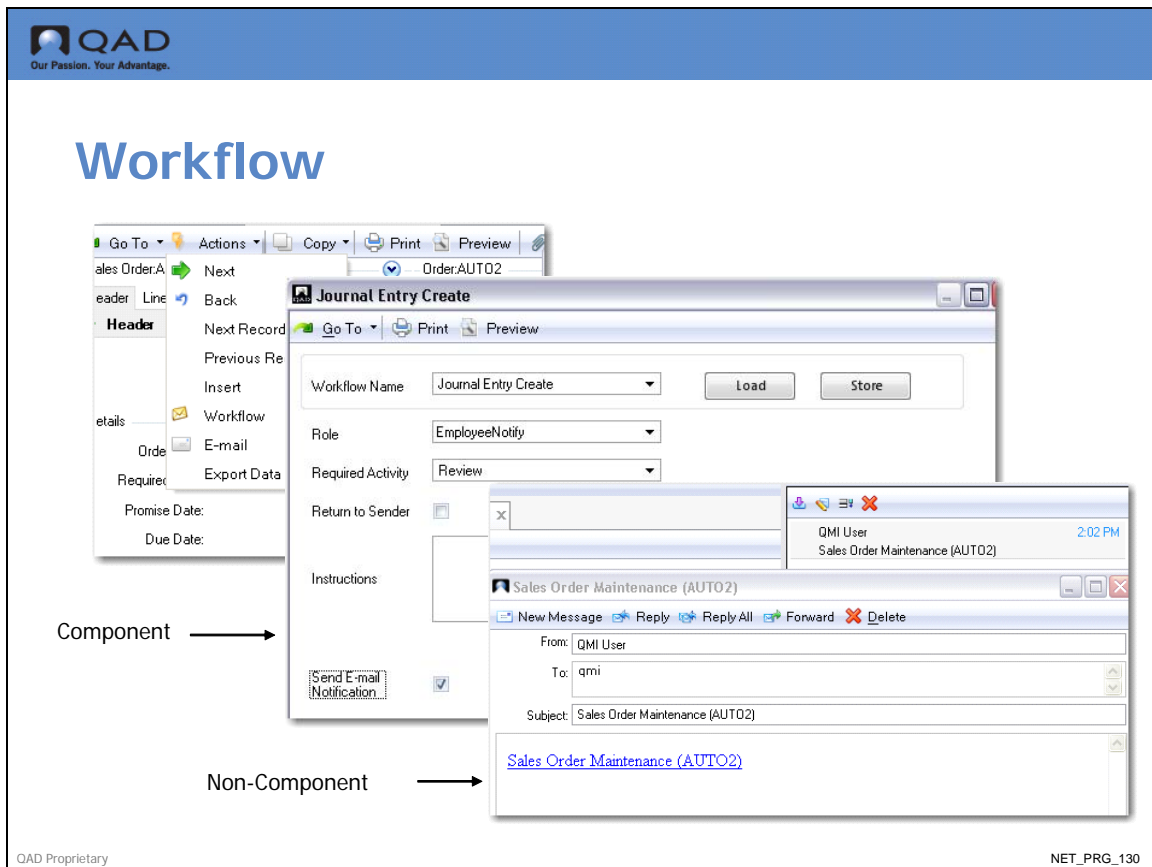


The QAD .NET UI includes a messaging capability so that you can send messages and workflow information to other users of the system. When using programs, browses, inquiries, and process maps, you have an Inbox on the Right side of the application area for sending and receiving messages. You can also 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

**QAD**  
Our Passion. Your Advantage.

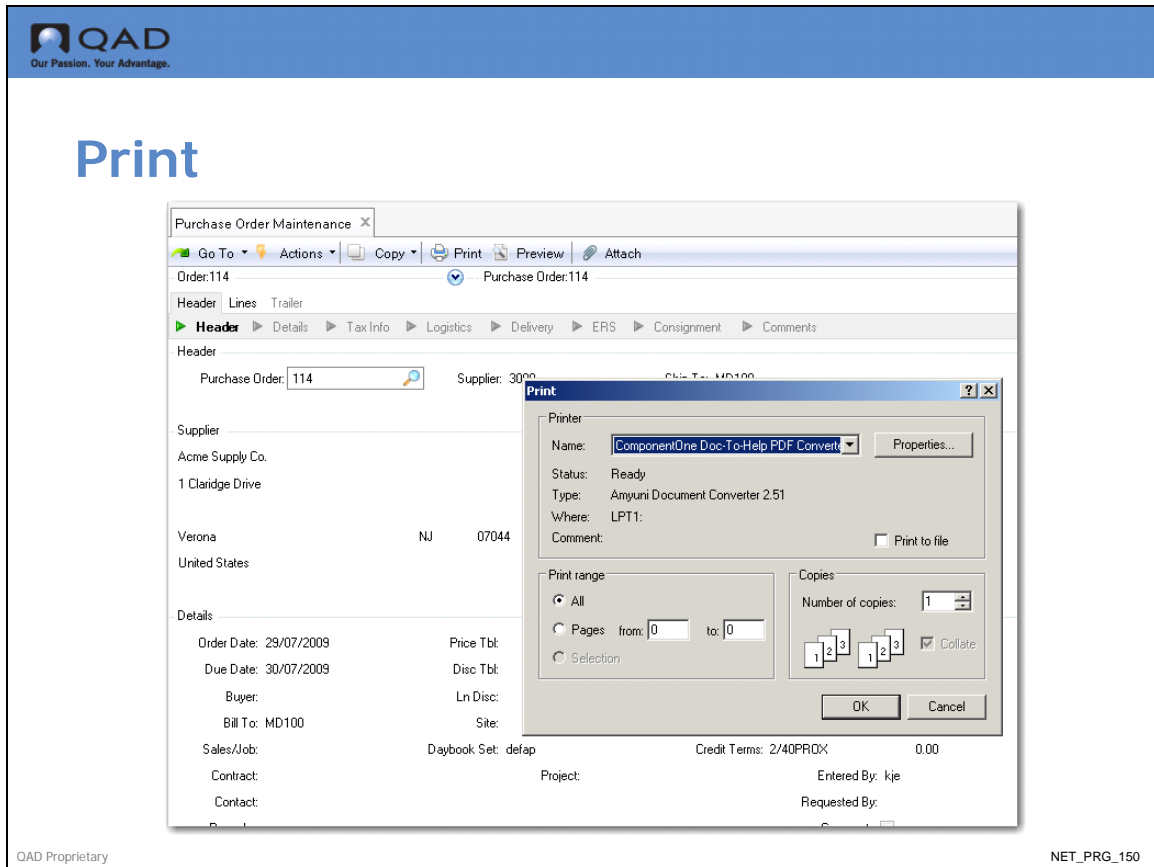
Copy

The screenshot shows the 'Purchase Order Maintenance' application window. The 'Copy' menu option is highlighted in the top toolbar. An 'Untitled - Notepad' window is open, displaying the text copied from the application screen. The copied text includes header information (Purchase Order: 1000, Supplier: 3010, Ship-To: 12000), supplier details (Page Inc., 10 Main Street, Chicago, IL 60616, United States), and order details (Order Date: 5/6/2008, Price Tbl, Due Date: 5/6/2008, Buyer, Bill To: 801, Sales/Job, Contact, Remarks: 444).

QAD Proprietary
NET\_PRG\_140

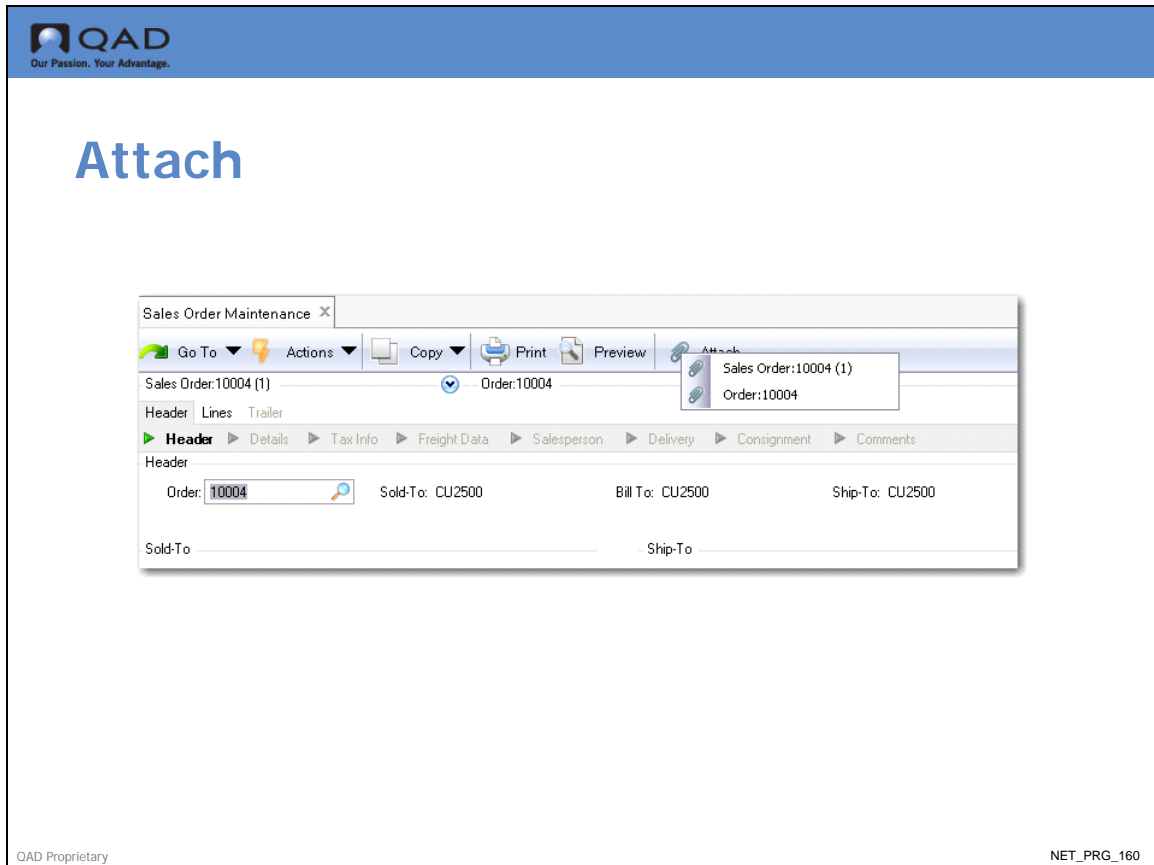
The Copy menu is only available for non-component based programs and lets you to copy the text of the current screen to the clipboard, or copy an image of the current screen to the clipboard.

## Print



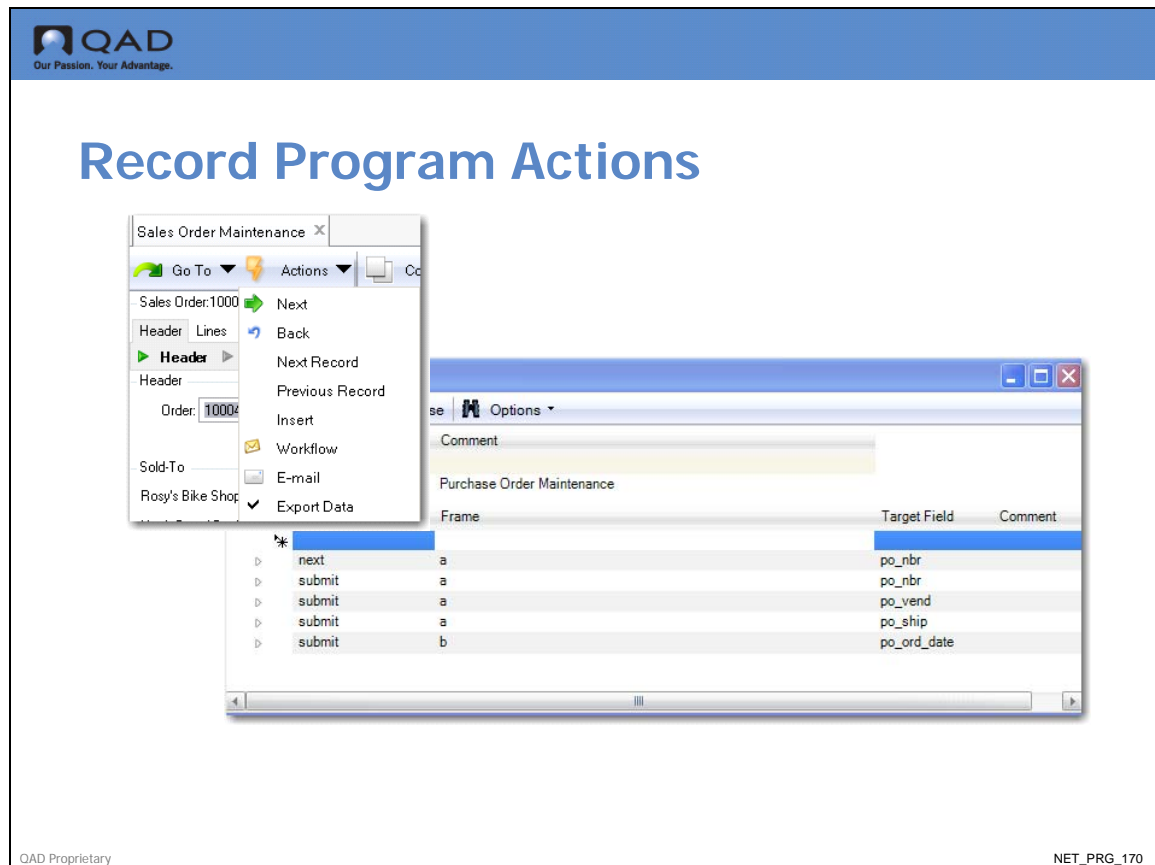
The Print menu is common to both types of program and prints the current screen to the default printer.

## 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.

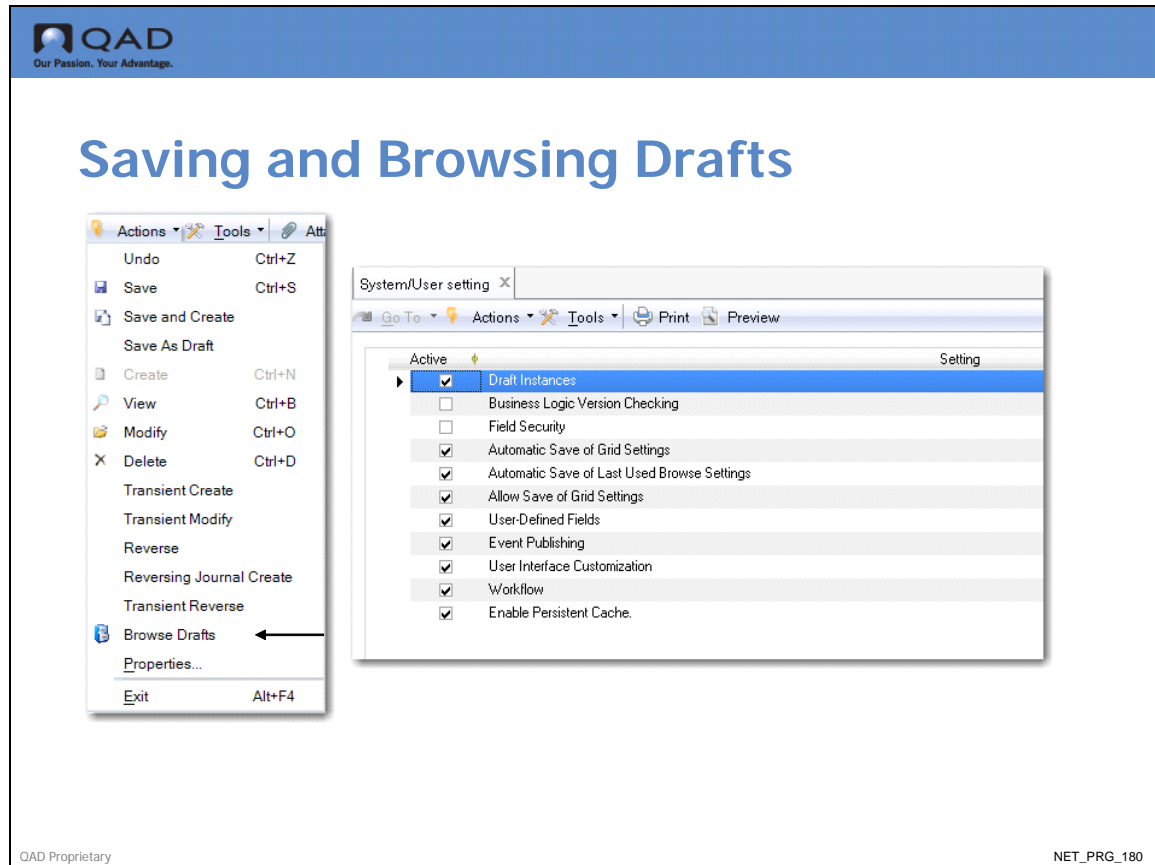
## Record Program Actions



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



### Chapter Summary

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

## 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

# **Browsets in the QAD .NET UI**

## Objective



### Chapter Objectives

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


## Benefits




### Chapter Benefits

- ▲ You will be familiar with the different types of browses in the QAD .NET UI.

## Training Flow



### Training Flow



- ▲ Introduction
- ▲ Navigation
- ▲ Application Help
- ▲ Program Types
- ▲ **Browses**
- ▲ Character Version

QA

NET\_BRO\_040

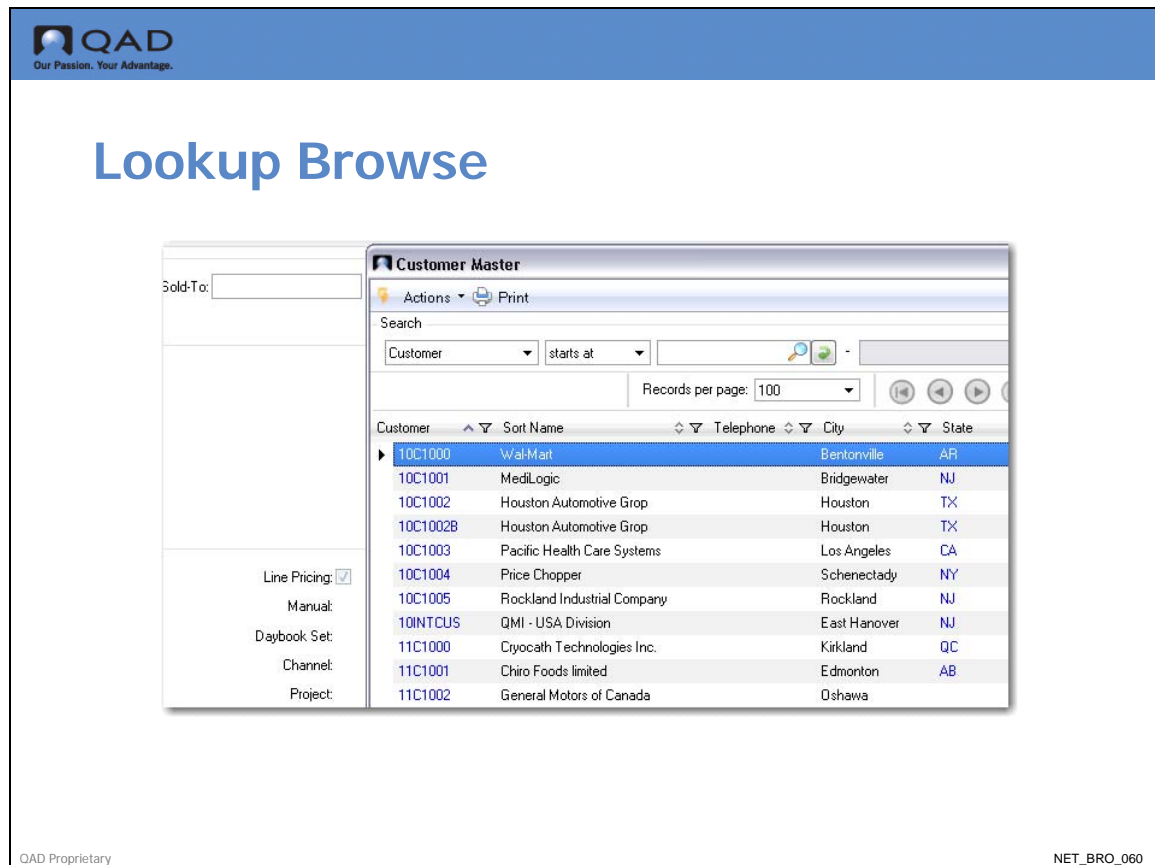
## Introduction to Browses in the QAD .NET UI



### 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

## 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

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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

The screenshot shows the 'Sales Order Browse' window. At the top, there's a search bar with a dropdown menu for search criteria (1). Below it, there's a search operator dropdown (2) and search input fields. The table below shows search results with columns: Sales Order, Sold To, Range, Line, Item Number, Status, Unit of Measure, and Quantity Ordered. Three numbered callouts (1, 2, 3) highlight specific UI elements: 1 points to the search criteria dropdown, 2 points to the search operator dropdown, and 3 points to the plus and X buttons for adding/removing filters.

Sales Order	Sold To	Range	Line	Item Number	Status	Unit of Measure	Quantity Ordered
10009	cu15	greater than	10.0	1 10-10000-001		FT	
10009	cu15	less than	-10.0	2 10-10000-001		FT	
10010	CU15	is not null	2.0	1 10-10000-001		FT	

- 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 than, 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

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# Component-Based Browse


Supplier	Business Relation Code	Inv Date	Reference	TC Balance	Curr	Due Date	Description
AFEUR001	EUR001	11/02/2010	Fr Supplies	-1,200.00	EUR	12/31/2010	Fr Supplies AFEUR001
A2004	Subcontractors Inc.	11/02/2010	SubCont	-34,553.00	USD	01/31/2011	SubCont A2004
A2001	Carbon Frames	11/02/2010	CarbFrame	-33,400.00	USD	01/31/2011	CarbFrame A2001
A2002	Tube City	11/02/2010	Tubes	-78,990.00	USD	01/31/2011	Tubes A2002
A2003	100% Pure - US	11/02/2010	AplInv_US	-40,980.00	USD	01/31/2011	AplInv_US A2003
A2003	100% Pure - US	11/02/2010	AplInv_US	-2,000.00	USD	01/31/2011	AplInv_US A2003
A2005	Corazon	11/02/2010	COR	-3,000.00	MXN	01/31/2011	COR A2005
Summaries:				Sum = -194,123.00			

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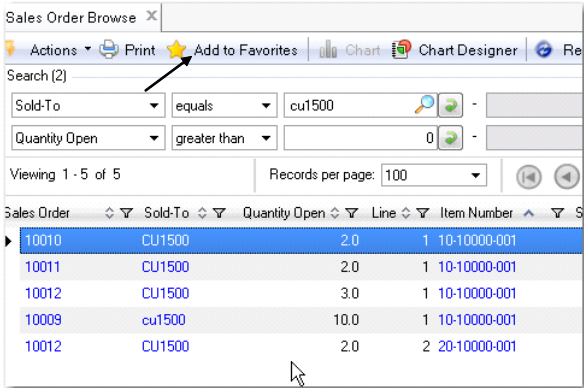
## Component-Based Browsers

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.

## Browsers as Favorites


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# Browsers as Favorites

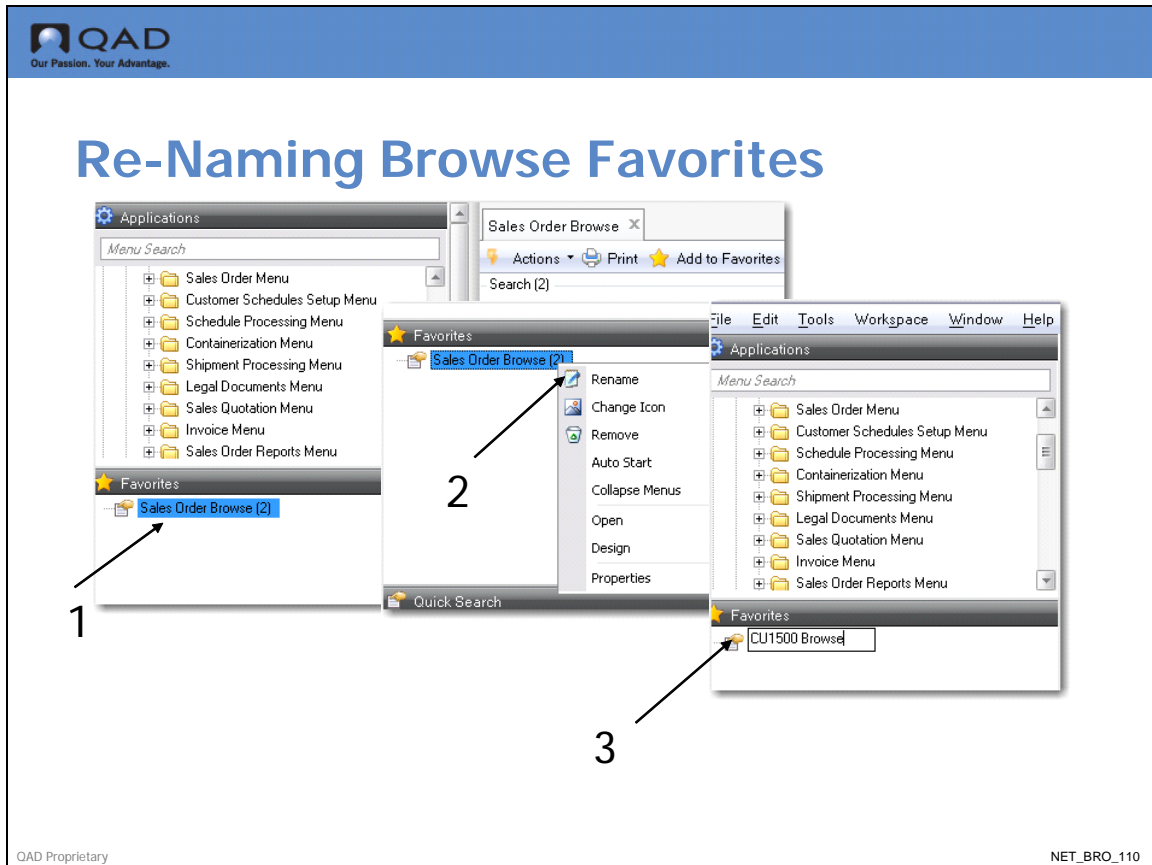


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NET\_BRO\_100

### 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

The screenshot displays the QAD .NET UI interface. At the top left is the QAD logo with the tagline "Our Passion. Your Advantage." The main heading is "Grouping Results". Below this is a control panel showing "Viewing 1 - 100 of 303" and "Records per page: 100". The main content is a list of grouped data items, each with a plus sign icon to its left, indicating it can be expanded. The items are as follows:

- + Description:1000 (1 item)
- Description:1001 no sub-acct (1 item)
  - GL Account:1001 (1 item)
    - + Sys Type: (1 item)
- + Description:1044 Draft Accepted (1 item)
- + Description:1044 Draft Allocated (1 item)
- + Description:1044 Draft For Collectio (1 item)
- + Description:Accounts Payable (1 item)
- + Description:Accounts Payable DM (1 item)
- + Description:Accounts Payable SPP (1 item)
- + Description:Accounts Payables Acct (1 item)
- + Description:Accounts Receivable (2 items)
- + Description:Accounts Receivable Acct (1 item)
- + Description:Accounts Receivable EUR (1 item)

At the bottom left of the screenshot is the text "QAD Proprietary" and at the bottom right is "NET\_BRO\_120".

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

The screenshot displays the QAD logo at the top left with the tagline "Our Passion. Your Advantage." Below the logo, the title "Summarizing Results" is centered. A data grid is shown with columns: Role Name, BC Balance, Type, Sub-Acct, and SC Balance. The grid contains 17 rows of invoice data. A summary popup is displayed over the grid, showing the following statistics:

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

Summary Information:

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

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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

**Column Options**

The screenshot shows the 'Sales Order Browse' window with a table of sales order data. The table has columns: Sales Order, Sold-To, Status, Line, Item Number, Unit of Measure, and Quantity Ordered. A context menu is open over the 'Unit of Measure' column header, showing options like 'Autosize Columns', 'Card View', 'Group By Line', 'Show Group By Box', 'Remove Grouping', 'Expand All Groups', 'Collapse All Groups', 'Summary', 'Clear All Filters', 'Hide Column', 'Reset to Factory Settings', 'Columns', and 'Properties'. Numbered callouts 1-4 indicate: 1. Clicking the column header to open the menu; 2. Adjusting column size by dragging the border; 3. Clicking the header to sort data; 4. Clicking the filter icon to display available filters.

Sales Order	Sold-To	Status	Line	Item Number	Unit of Measure	Quantity Ordered
10019	CE4000					-10.0
						10.0
						10.0
						10.0
						2.0
						2.0
						2.0
						10.0
						40.0
						40.0
						10.0

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- 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

The screenshot shows the 'Supplier Invoice Browse for View - Manage Filter Fields' dialog box. The dialog has a title bar with the QAD logo and the text 'Our Passion. Your Advantage.'. Below the title bar is a search panel with the following fields:

- Search (14)
- Open
- Invoice Date

The main area of the dialog is a table with the following columns: Label, Visible, Operator, First Initial Value, and Second Initial Value. The table contains the following rows:

Label	Visible	Operator	First Initial Value	Second Initial Value
Supplier Code	<input checked="" type="checkbox"/>	equals		
Business Relation	<input checked="" type="checkbox"/>	equals		
Reference	<input checked="" type="checkbox"/>	equals		
Year	<input checked="" type="checkbox"/>	equals		
Daybook Code	<input checked="" type="checkbox"/>	equals		
Voucher	<input checked="" type="checkbox"/>	equals		
Posting Date	<input checked="" type="checkbox"/>	equals		
Open	<input checked="" type="checkbox"/>	equals	true	
Invoice Date	<input checked="" type="checkbox"/>	equals		
Invoice Status Co	<input checked="" type="checkbox"/>	equals		
Name	<input checked="" type="checkbox"/>	equals		

The 'Open' row is highlighted in blue. The 'First Initial Value' column for the 'Open' row is set to 'true'. The 'Second Initial Value' column is empty for all rows.

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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 screenshot shows the QAD .NET UI interface. At the top left is the QAD logo with the tagline "Our Passion. Your Advantage." Below this is a large blue header with the word "Reports" in white. The main content area displays a report titled "Default Daybook Browse" with the subtitle "QMSUS USD". The report is presented as a table with the following columns: Transaction Type, Document Type, From Entity, To Entity, and Daybook. The report data is as follows:

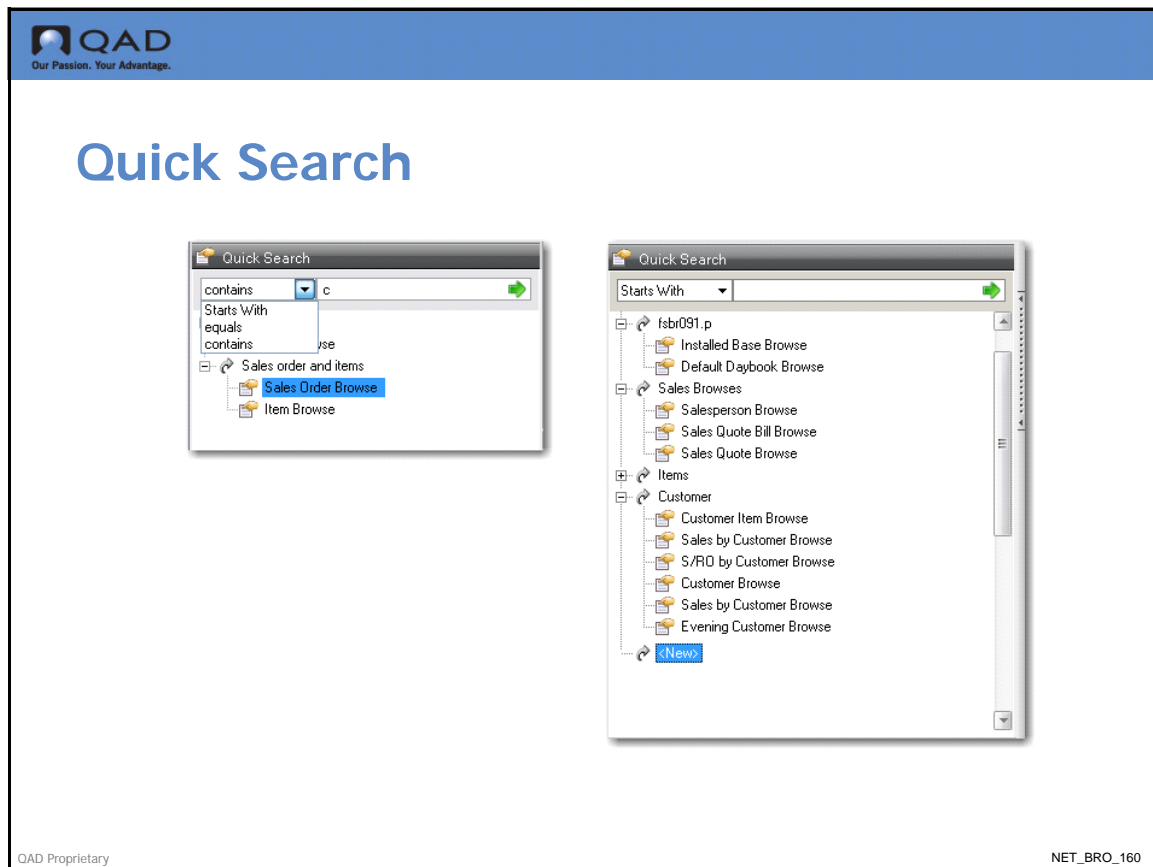
Transaction Type	Document Type	From Entity	To Entity	Daybook
IC				USSYSDB
IC				ICDEFDB
IC	CST-ADJ			stdoost
IC	ISS-PRV			ISS-PRV
IC	ISS-SO			ISS-SO
IC	ISS-UNP			ISS-UNP
IC	ISS-WO			WCISS
IC	MATL-VAR			WOMVAR
IC	RCT-PO			RCT-PO

Overlaid on the report is a "Filter Viewer" window with a toolbar containing "Print", "Save", and "Refresh" buttons. Below the toolbar are navigation icons and the text "Page 1" and "82.48". To the left of the report, an "Actions" menu is open, listing the following options: "Export to CSV", "Export to Excel", "Export to PDF", "Workflow", "E-mail", and "Report". An arrow points to the "Report" option in the menu.

At the bottom left of the screenshot, it says "QAD Proprietary". At the bottom right, it says "NET\_BRO\_150".

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.

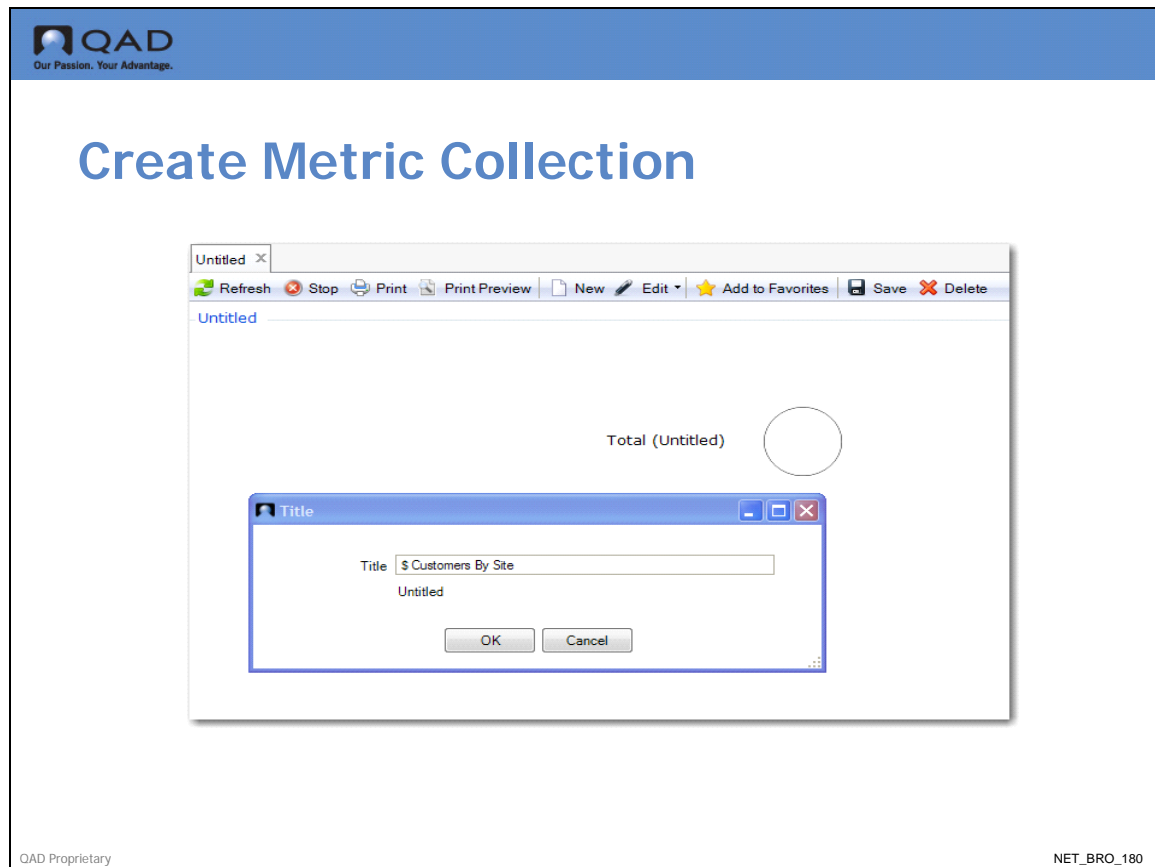
## Operational Metrics

Name	Result	Total	Progress	Percentage	Indicator
Zero Credit Limit	18	119		15%	Yellow triangle
Negative Credit Limit	0	119		0%	Green circle
Greater than 90% credit used	0	119		0%	Green circle
More than 90 days since last credit review	119	119		100%	Red diamond
Total (Customer Credit Limits)					
Total (Accounts Receivable)					

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. [Excel 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

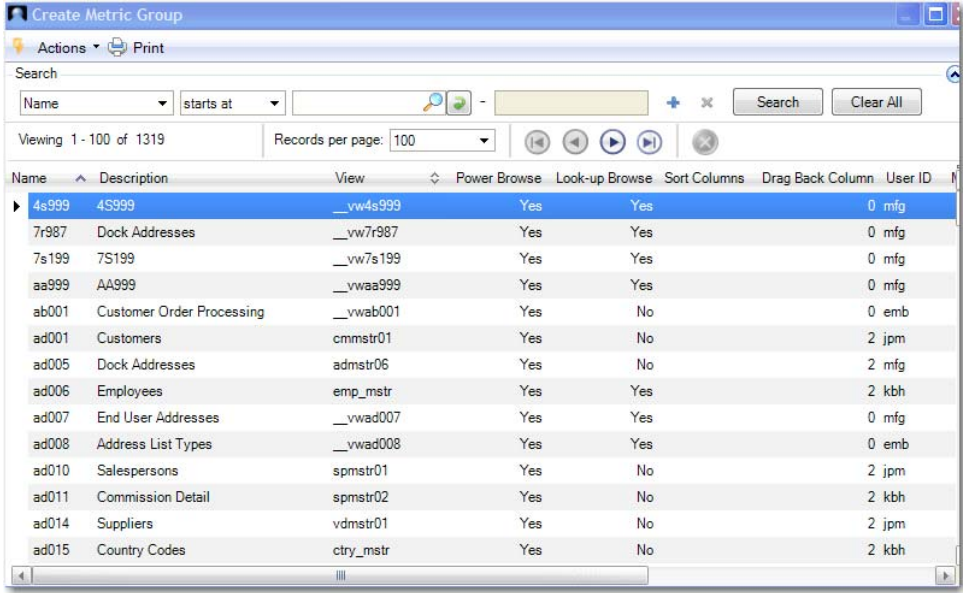


- Select Create Metric Collection from the Administration menu to create the initial metric collection. The system prompts you to name the collection.
- Right-click the collection title, or select Edit|Create Metric Group to create a metric group for the collection. You are prompted to select the parent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

## Creating a Metric Group


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## Edit, Create Metric Group

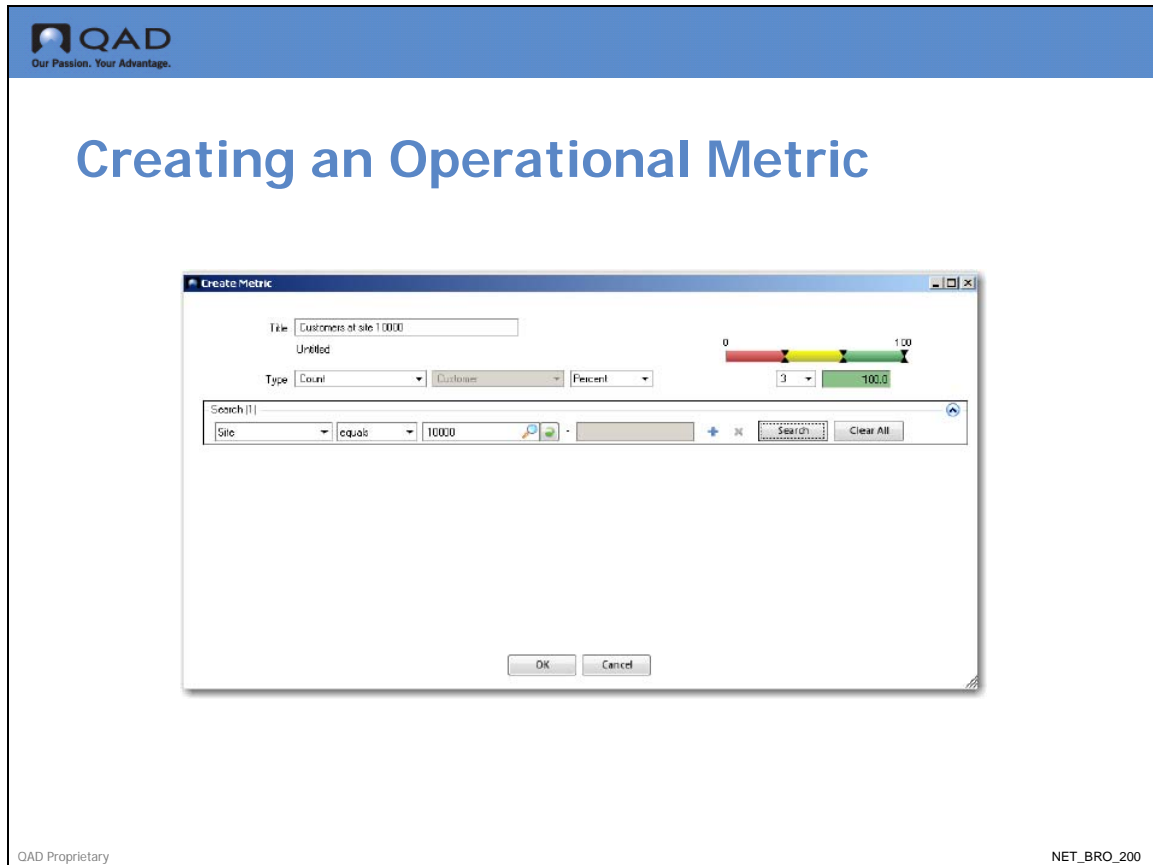


Name	Description	View	Power Browse	Look-up Browse	Sort Columns	Drag Back Column	User ID
4s999	4S999	__vw4s999	Yes	Yes			0 mfg
7r987	Dock Addresses	__vw7r987	Yes	Yes			0 mfg
7s199	7S199	__vw7s199	Yes	Yes			0 mfg
aa999	AA999	__vwaa999	Yes	Yes			0 mfg
ab001	Customer Order Processing	__vwab001	Yes	No			0 emb
ad001	Customers	cmmstr01	Yes	No			2 jpm
ad005	Dock Addresses	admstr06	Yes	No			2 mfg
ad006	Employees	emp_mstr	Yes	Yes			2 kbh
ad007	End User Addresses	__vwad007	Yes	Yes			0 mfg
ad008	Address List Types	__vwad008	Yes	Yes			0 emb
ad010	Salespersons	spmstr01	Yes	No			2 jpm
ad011	Commission Detail	spmstr02	Yes	No			2 kbh
ad014	Suppliers	vdmstr01	Yes	No			2 jpm
ad015	Country Codes	ctry_mstr	Yes	No			2 kbh

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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.

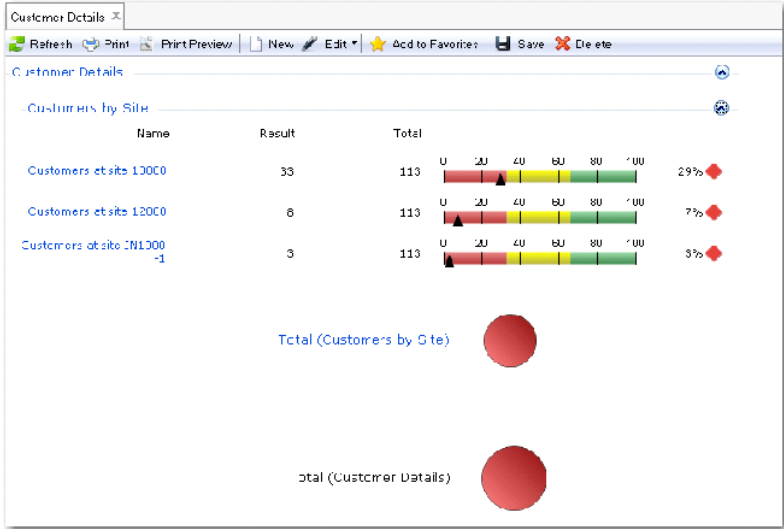
**Percent/Range.** Select Percent to display the metric as a percentage of the browse total. Select Range to display the metric as a range of figures. This option lets you increase the granularity of the results.

**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



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# Edit Operational Metric



Name	Result	Total	Percentage
Customers at site 120C0	35	113	29%
Customers at site 120C0	8	113	7%
Customers at site 121200-1	3	113	3%

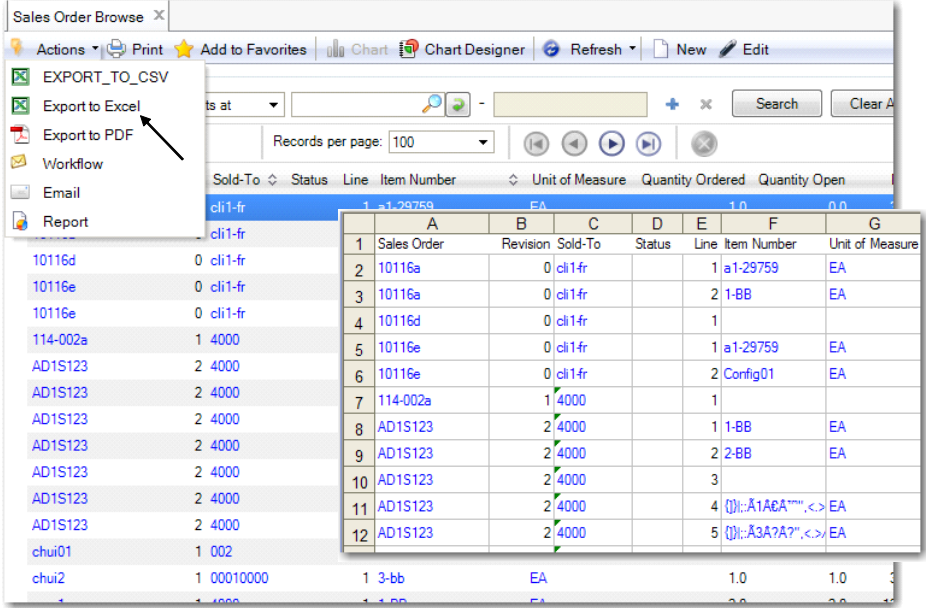
Total (Customers by Site) 

Total (Customer Details) 

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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 Browsers



The screenshot shows the 'Sales Order Browse' window with the 'Actions' menu open. The 'Export to Excel' option is highlighted. Below the menu, a preview of the data table is visible. The table has columns for Sales Order, Revision, Sold-To, Status, Line, Item Number, and Unit of Measure.

	A	B	C	D	E	F	G
1	Sales Order	Revision	Sold-To	Status	Line	Item Number	Unit of Measure
2	10116a	0	cli1fr		1	a1-29759	EA
3	10116a	0	cli1fr		2	1-BB	EA
4	10116d	0	cli1fr		1		
5	10116e	0	cli1fr		1	a1-29759	EA
6	10116e	0	cli1fr		2	Config01	EA
7	114-002a	1	4000		1		
8	AD1S123	2	4000		1	1-BB	EA
9	AD1S123	2	4000		2	2-BB	EA
10	AD1S123	2	4000		3		
11	AD1S123	2	4000		4	{:}:A1A&A***.<>	EA
12	AD1S123	2	4000		5	{:}:A3A?A?<>	EA

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

- ▲ Loading Data for Export to Excel for Maintenance
  - The Load option lets you retrieve all the records from the database and export them to Excel for maintenance.
  - Choose the Excel Integration activity from the menu and load data into the grid using the Load option (right-click the empty grid to select Load).
  - 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 your changes.
  - 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).

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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:

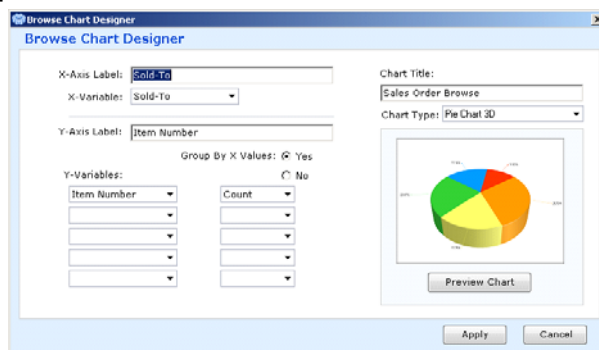
- Choose the Excel Integration activity such as Country Excel Integration.
- Load data into the grid using the Load option (right-click the empty grid to select Load). The Load option lets you retrieve all database records for a supported business component.
- Export the data to a spreadsheet, open the 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



### 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.



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Generate graphical representations of browse data.

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

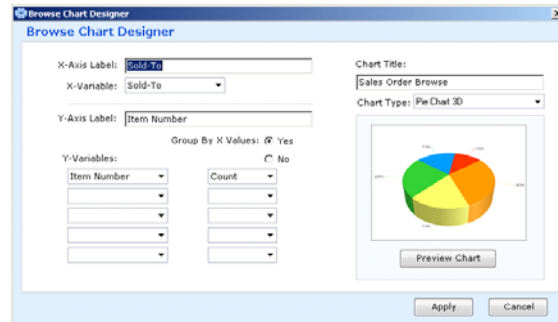
Use the chart view editor to select data in a browse and display the data as a pie chart or bar graph, for example.

## Using The Chart Designer



## 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



## Chart Options



### Chart Options

- ▲ Rotate and Zoom 3D Charts
- ▲ Search Charts
- ▲ Hide Titles and Legends

## 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

## Summary



### Summary

- ▲ Browsers 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.

## 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.

