QAD Enterprise Applications
Standard and Enterprise Edition

Training Guide

QAD .NET User Interface

70-3221-2014SE_EE
QAD 2014 Enterprise Edition and 2014 Standard Edition
September 2014

NETUI_TG_v2014SE_EE.pdf/qad/sti

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Contents

QAD .Net User Interface Change Summary

The following table summarizes significant differences between this document and the last published version.

Date/Version	Description	Reference
March 2014 EE and SE	Rebranded	--
March 2013 EE and SE	Rebranded	--
Sept 2012/2012.1 EE and 2012 SE	Rebranded for QAD 2012.1 EE	--
Sept 2012/2012.1 EE and 2012 SE	Content edit and update of screens throughout	--
March 2012/2012 EE and SE	Rebranded for QAD 2012 EE and SE	--
Sept 2011/2011.1 EE and 2011 SE	Rebranded for QAD 2011.1 EE	--

About This Course

Course Description

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

The course includes:

- An introduction to the QAD .NET UI
- Navigating the QAD .NET UI
- Application help options
- QAD .NET UI programs
- Basics of browses
- An introduction to the character user interface

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

Objective

Learn how to navigate QAD Enterprise Applications using the QAD .NET UI. In addition, students will be able understand the help options, different types of 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

Students should have 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

This guide applies to both the Standard Edition and the Enterprise Edition of QAD Enterprise Applications. Use the hands-on exercises in this book with the latest Enterprise Edition learning environment in the 10USA > 10USACO workspace. When prompted to log in, specify *demo* for user ID and *qad* for password.

Note Users of Standard Edition should complete the exercises in the EE environment; the concepts are the same in both environments and can be applied to Standard Edition. Features that only apply to Enterprise Edition are noted in the text.

Additional Resources

If you encounter questions on QAD software that are not addressed in this book, several resources are available. The QAD corporate Web site provides product and company overviews. From the main site, you can access the QAD Learning or Support site and the QAD Document Library. Access to some portions of these sites depends on having a registered account.

http://www.qad.com/

QAD Learning Center

To view available training courses, locations, and materials, use the QAD Learning Center. Choose Education under the Services tab to access this resource. In the Learning Center, you can reserve a learning environment if you want to perform self-study and follow a training guide on your own.

QAD Document Library

To access release notes, user guides, training guides, and installation and conversion guides by product and release, visit the QAD Document Library. Choose Document Library under the Support tab. In the QAD Document Library, you can view HTML pages online, print specific pages, or download a PDF of an entire book.

To find a resource, you can use the navigation tree on the left or use a powerful cross-document search, which finds all documents with your search terms and lets you refine the search by book type, product suite or module, and date published.

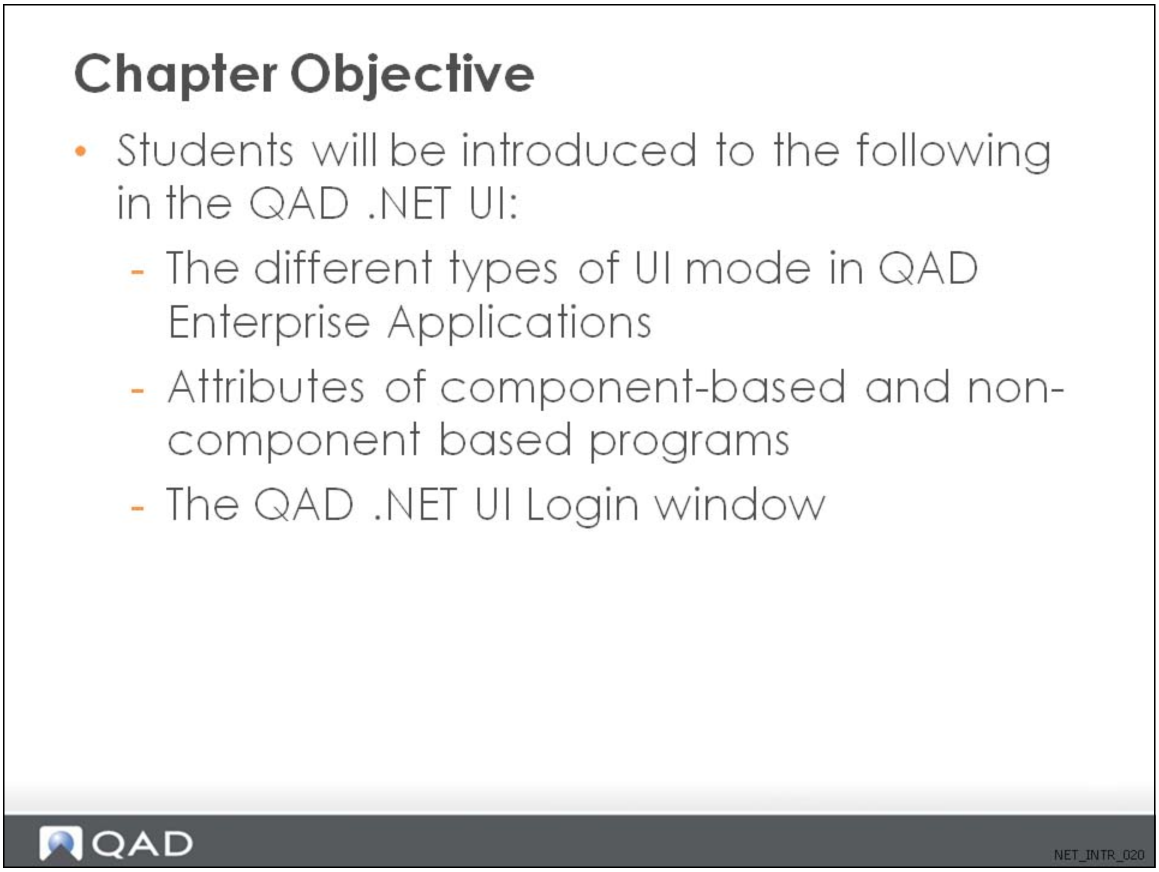
QAD Support

Support also offers an array of tools depending on your company’s maintenance agreement with QAD. These include the Knowledgebase and QAD Forums, where you can post questions and search for topics of interest. To access these, choose Visit Online Support Center under the Support tab.

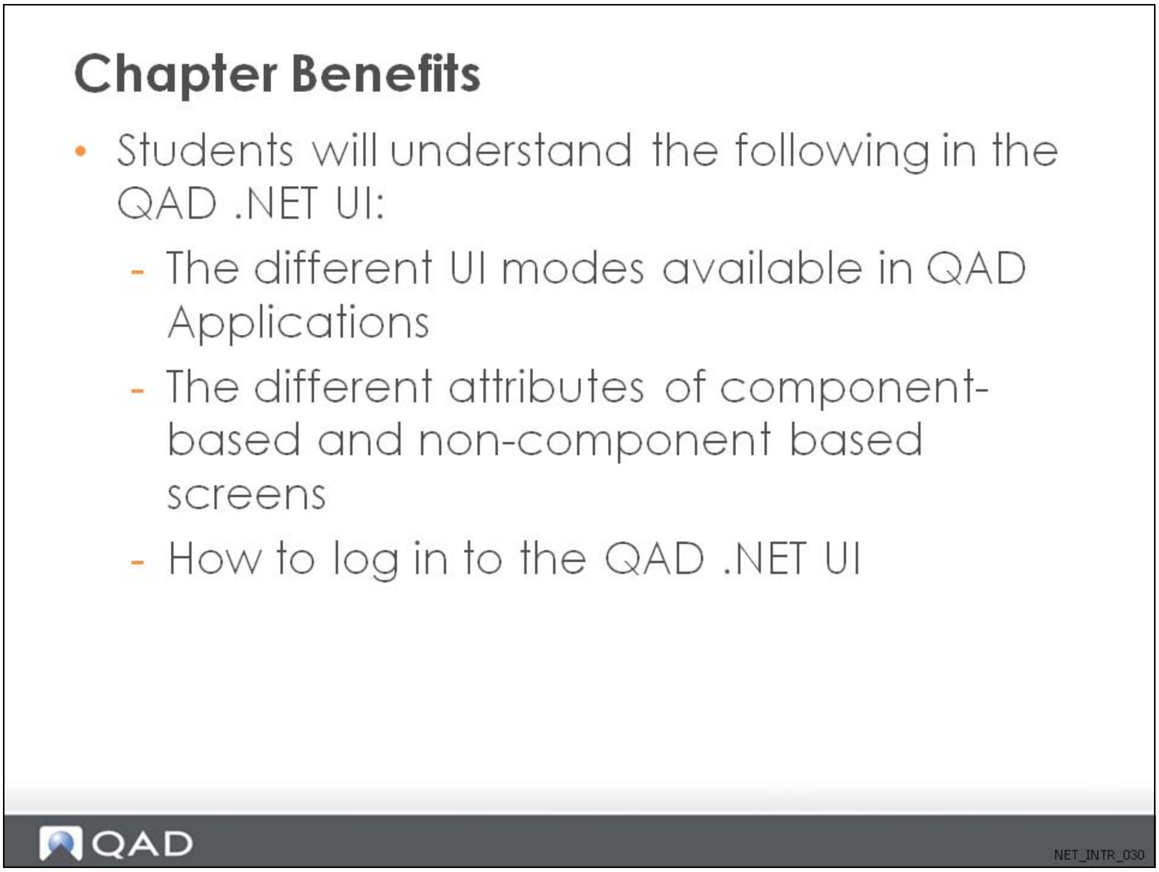
Chapter 1

Introduction to QAD .NET UI

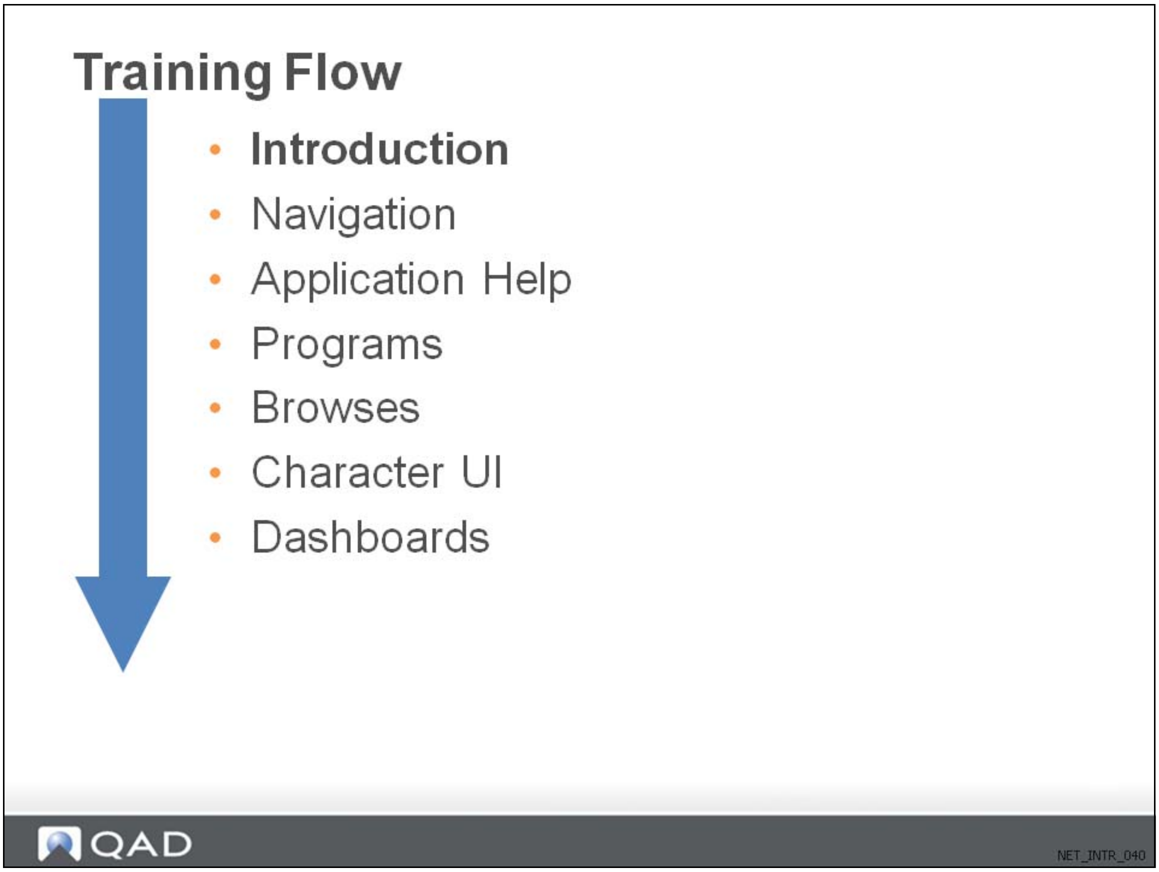
Objective


Chapter Objective
• Students will be 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
QAD
NET_INTR_020

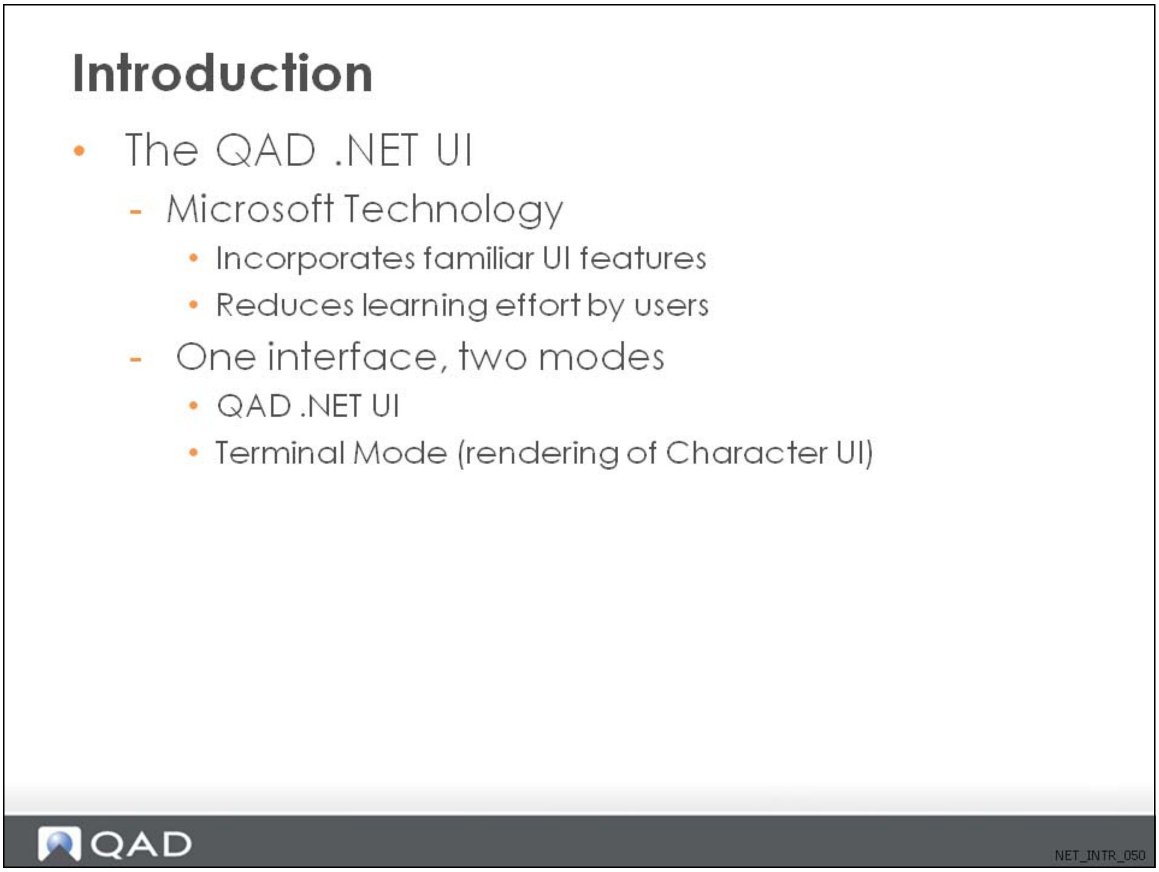
Benefits


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
QAD
NET_INTR_030

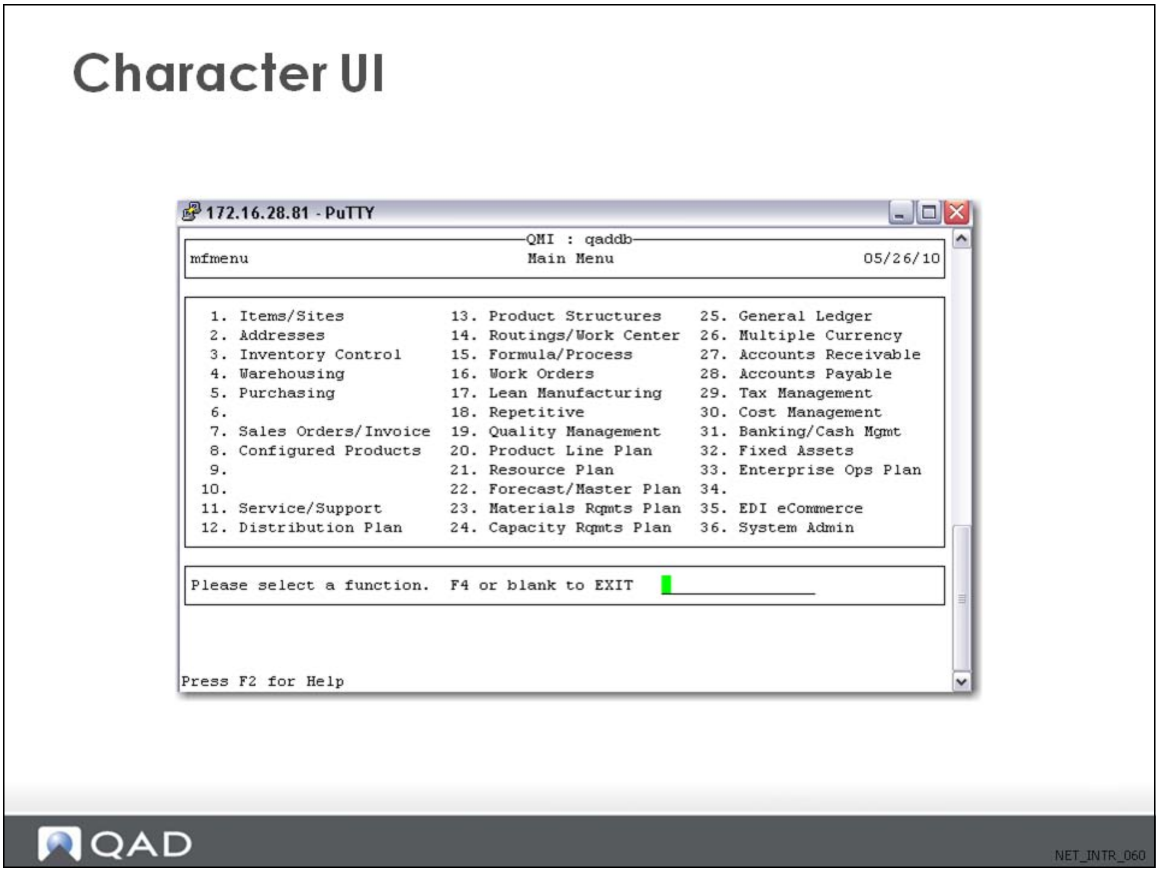
Training Flow



Introduction — QAD .NET UI



Character UI

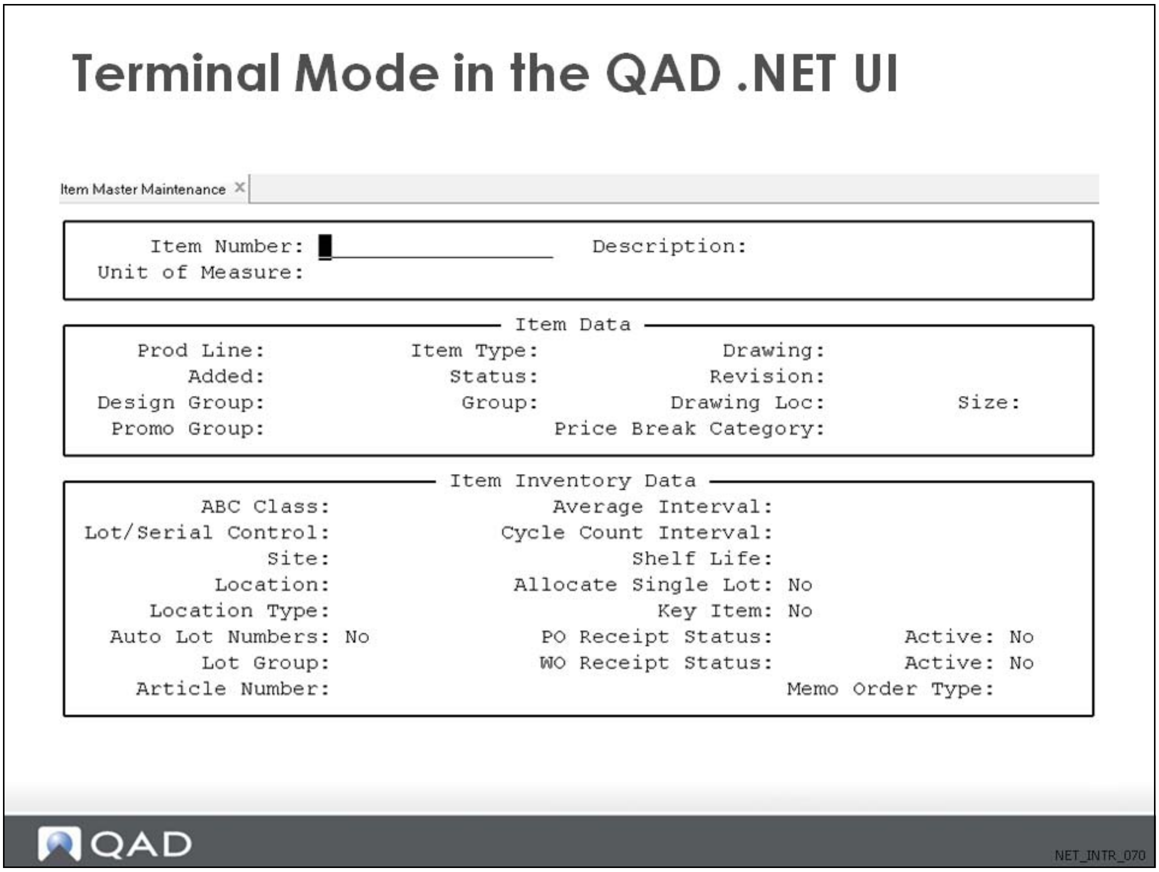


Unlike the QAD .NET user interface, the character user interface depends completely on input from the keyboard. Because it is not a graphical user interface, all navigation is based on:

- 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.

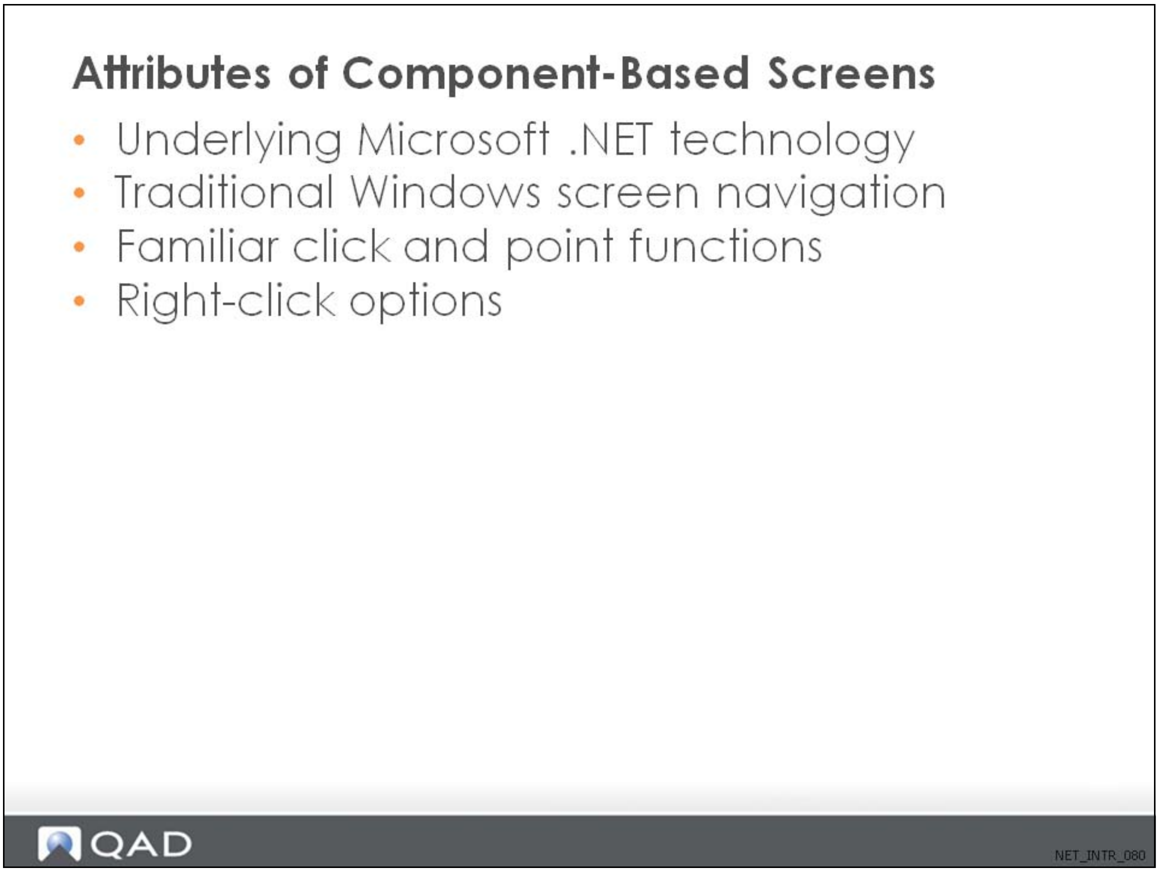
Component-based functions are accessible only through the QAD .NET UI. You cannot access any of these functions from the character UI. Chapter 6, “Using the Character UI,” on page 115 discusses this UI in more detail.

Terminal Mode in the QAD .NET UI

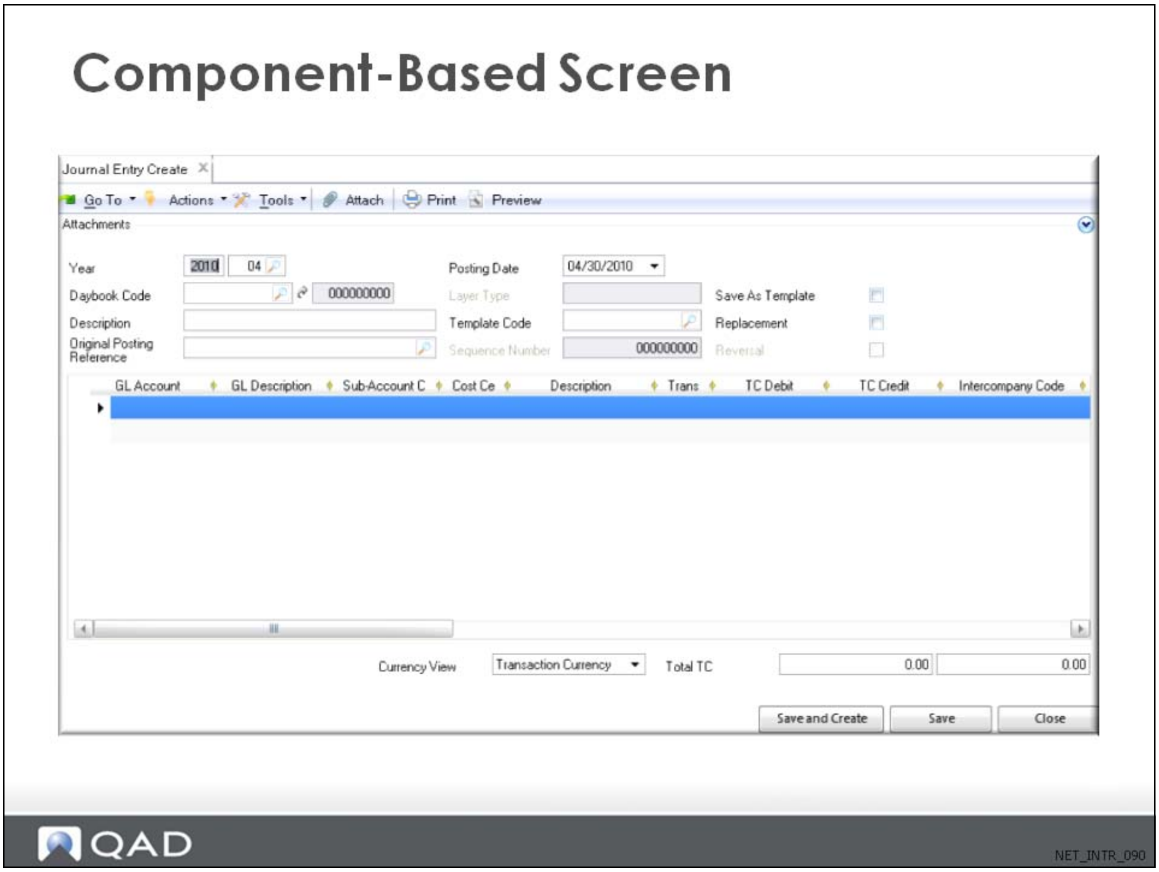


With the QAD .NET UI interface, you can still use non-component based programs in a CHUI interface. You do this by selecting Terminal mode in the Program Properties option. This is described in Chapter 2 in the topic “Properties Options: Open With” on page 30.

Attributes of Component-Based Programs

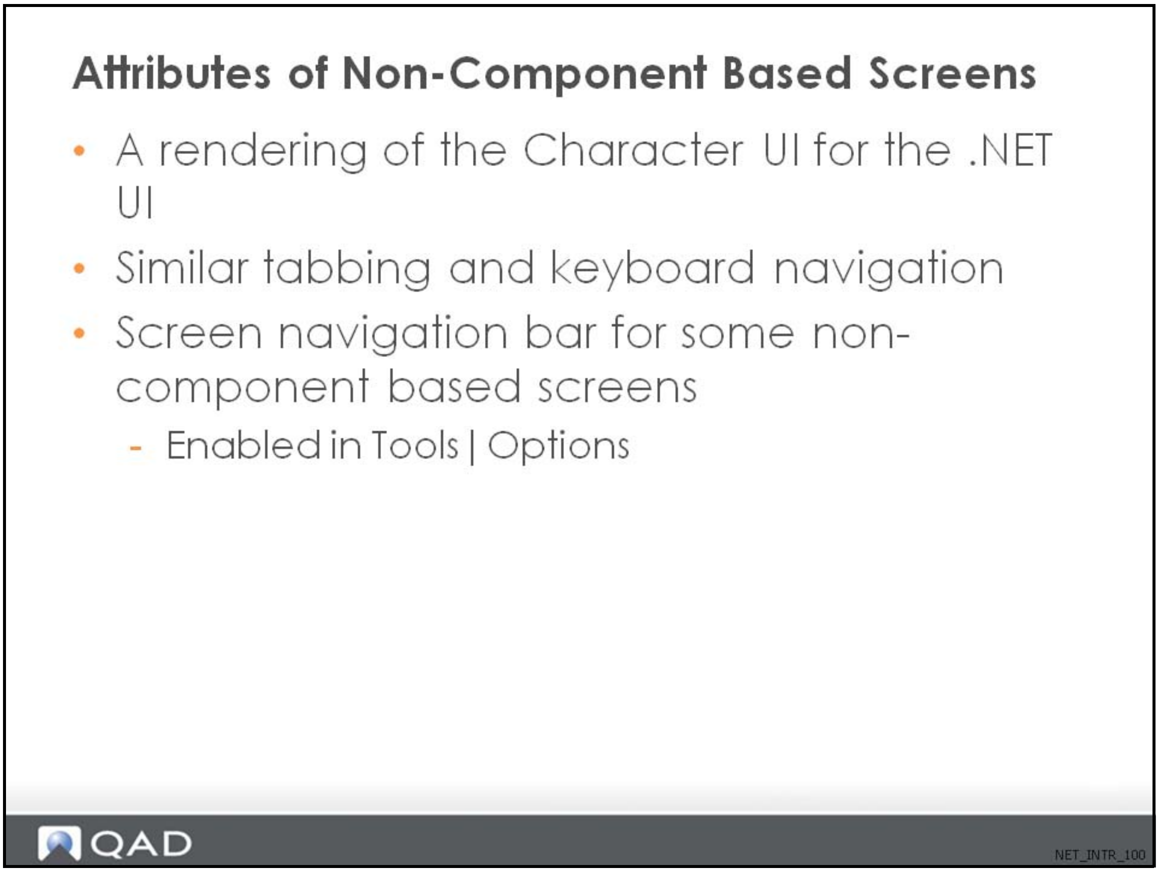


Component-Based QAD .NET UI Screen



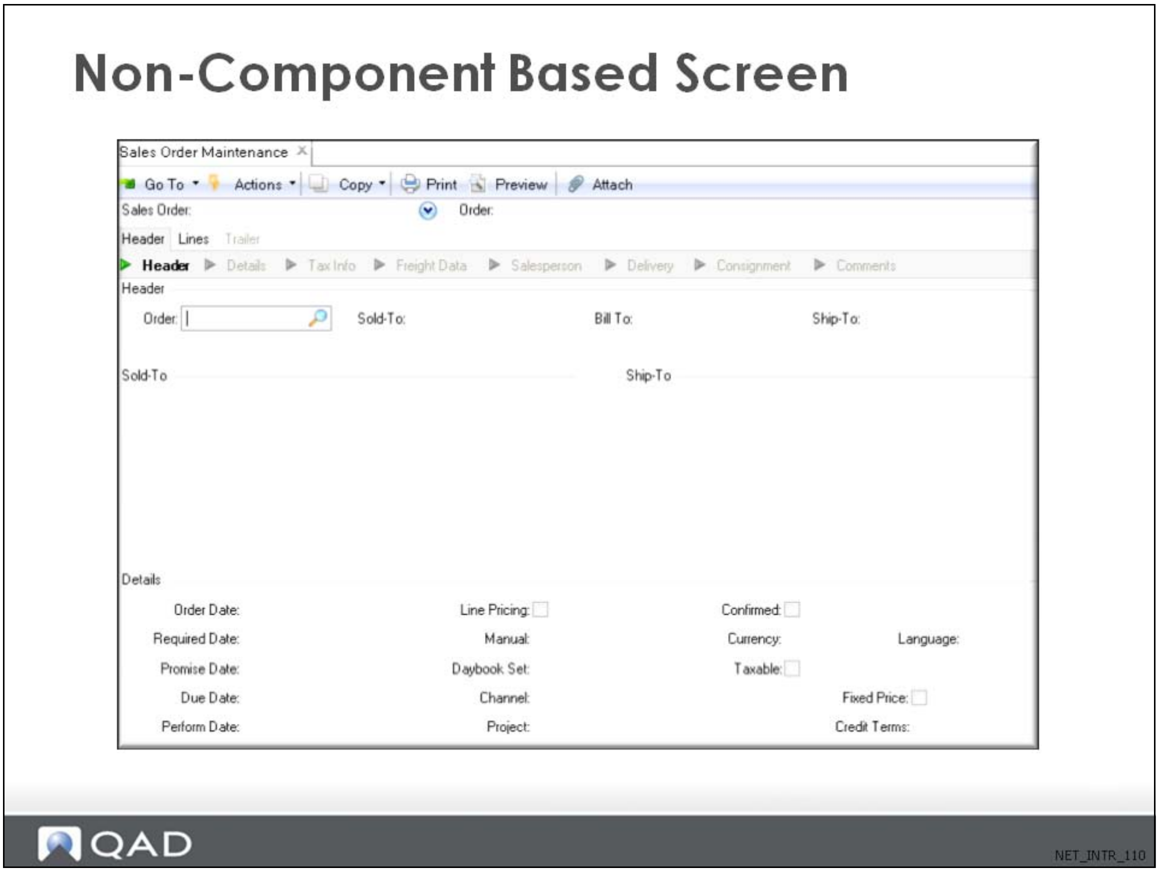
You use traditional mouse clicks, tabs, and keyboard tabbing to navigate the component-based screen.

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



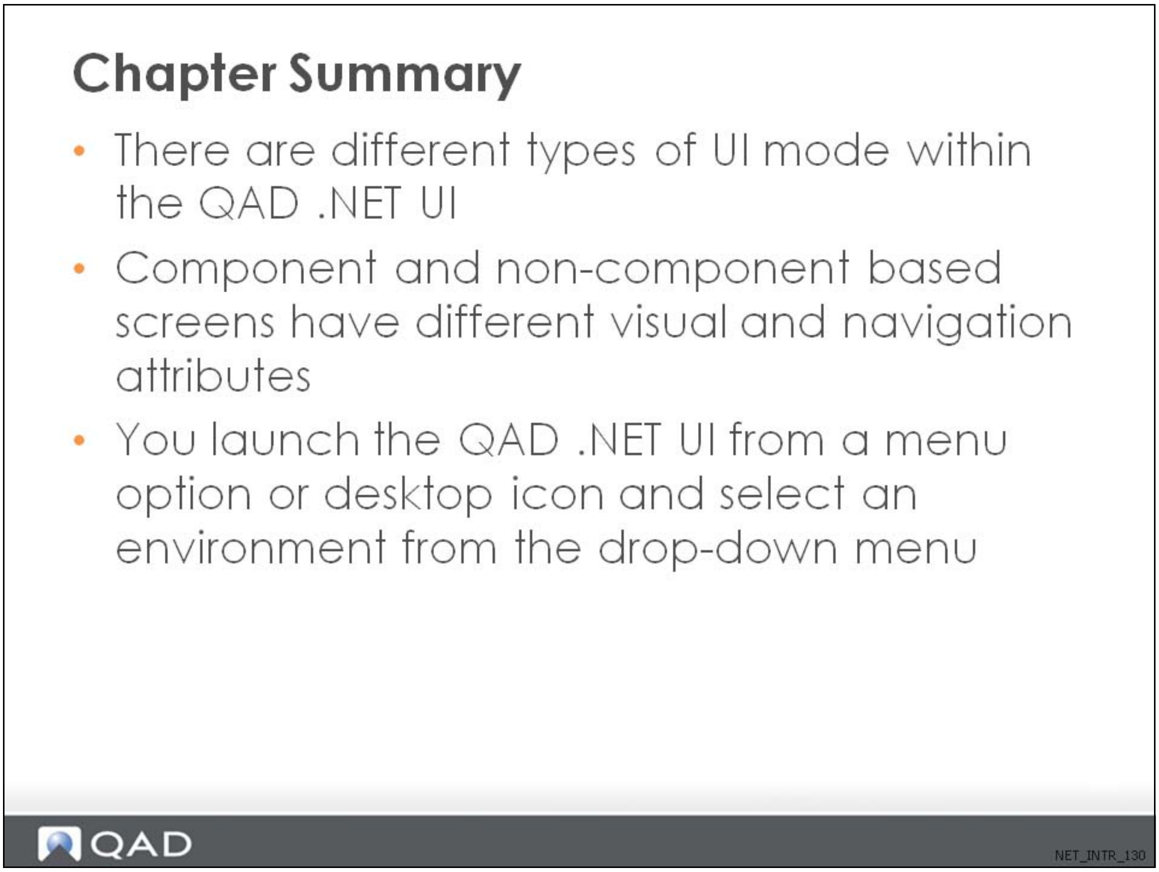
All Standard Edition are non-component based. All Enterprise Edition programs except QAD Enterprise Financials and some related system administration functions are also non-component based.

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 ID and password. Select a system environment for which you have permissions from the drop-down menu.

Summary



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)

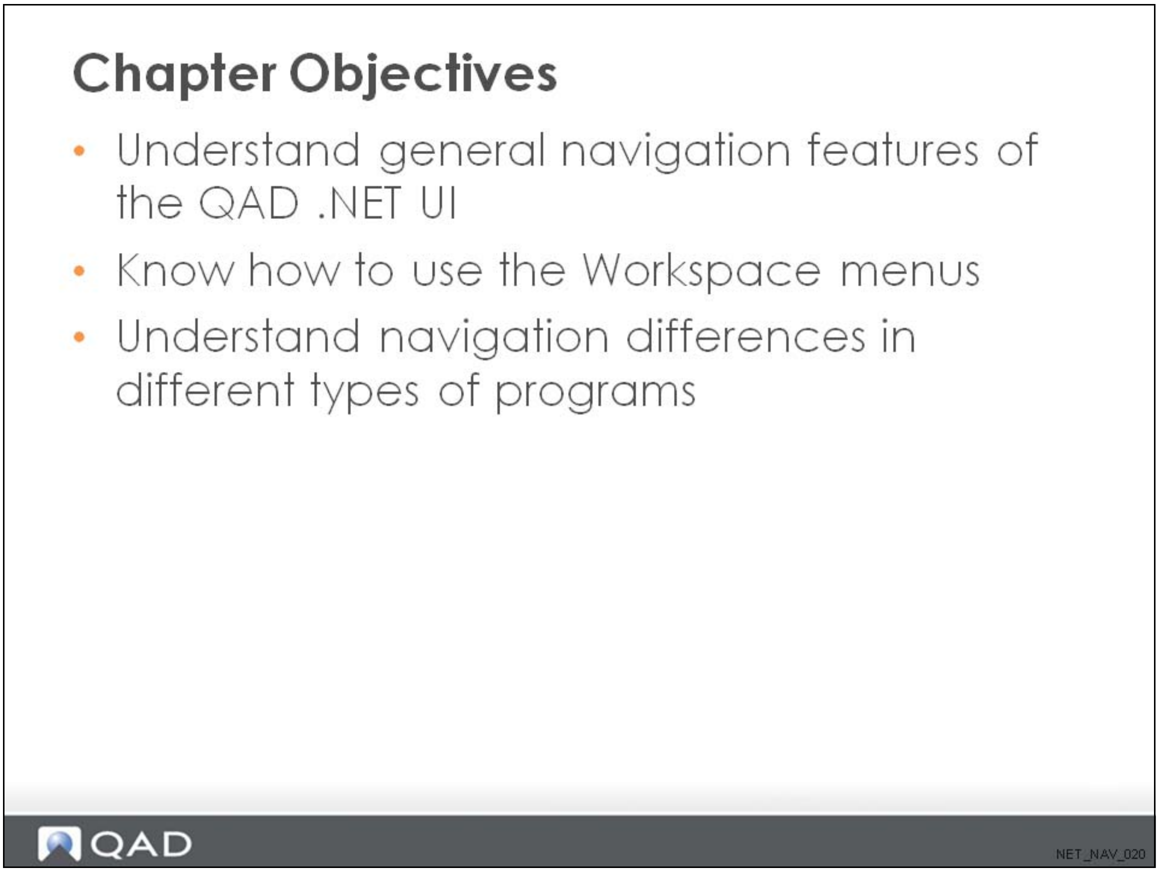
3 Which of the two interfaces depends completely on input from the keyboard?

4 Which Enterprise Edition application is component based?

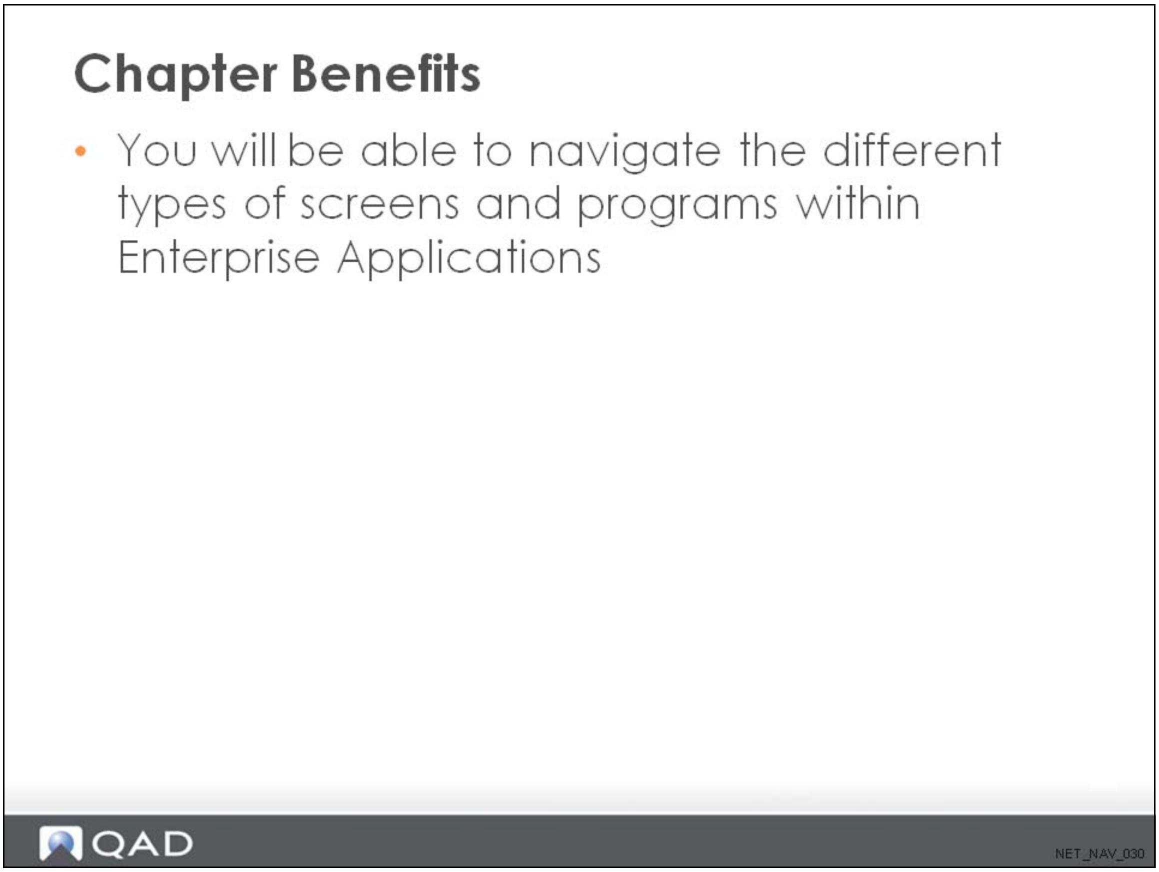
Chapter 2

Navigating the QAD .NET UI

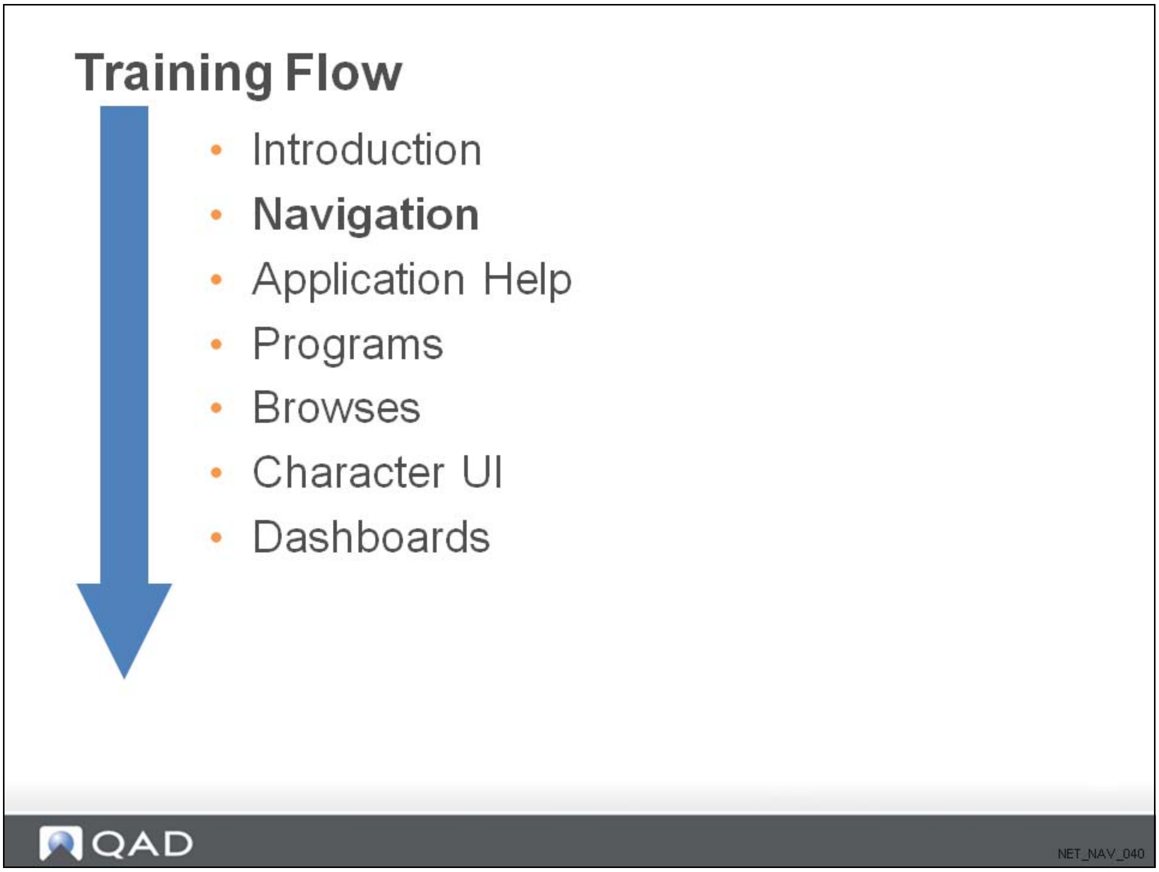
Objective


Chapter Objectives
Understand general navigation features of the QAD .NET UI
Know how to use the Workspace menus
Understand navigation differences in different types of programs
QAD
NET_NAV_020

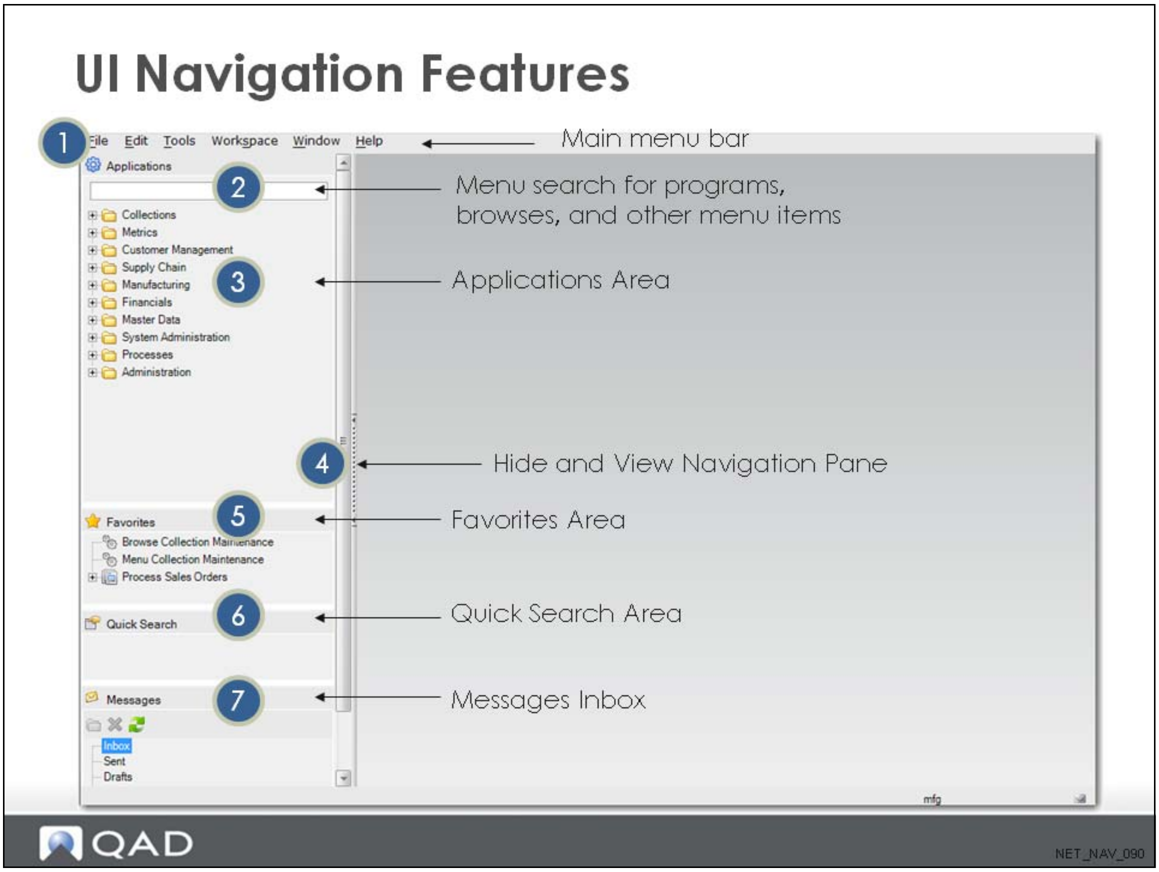
Benefits


Chapter Benefits
You will be able to navigate the different types of screens and programs within Enterprise Applications
QAD
NET_NAV_030

Training Flow



Overview of UI Navigation Features



The QAD .NET User Interface (UI) provides a common framework for multiple QAD applications. This framework, based on Microsoft .NET technology, has excellent performance and provides best-practice usability and deployment features, as well as extensive ways for users to adapt the UI to their preferred work style.

When you first log into the .NET UI, you see a screen like the one above.

1 The main menu bar includes selections for File, Edit, Tools, Workspace, Window, and Help.

2 The menu search helps you locate programs to run.

3 The Application area displays the application programs that can be run in the QAD .NET UI.

4 Use the dashed bar to close and open the navigation pane. Closing the pane gives you more area to work in.

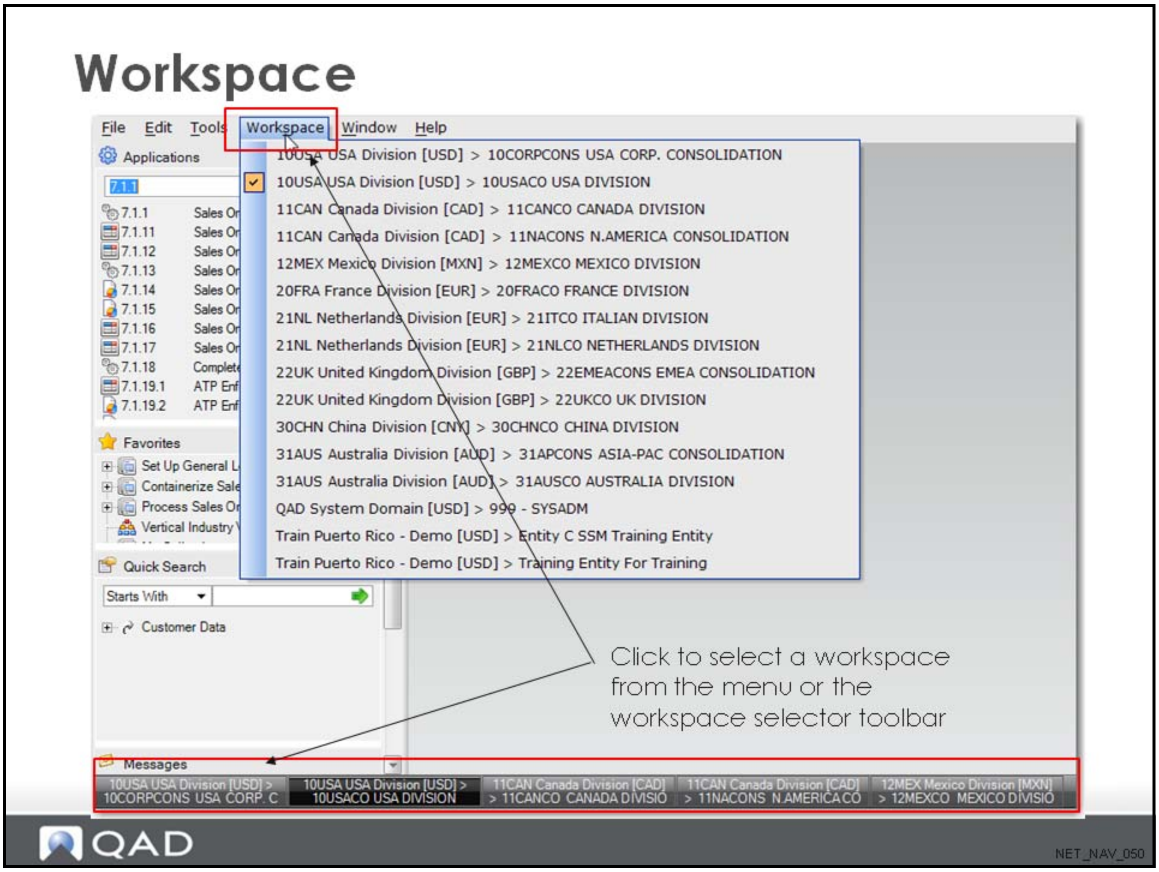
5 The Favorites area can be customized by each user to list frequently used programs.

6 The Quick Search area lets you search for a value across all of the fields in a browse group, which are definable by each user (see “Quick Search” on page 103 for details).

7 The Messages inbox displays messages generated through the QAD Enterprise Applications internal mail system.

Each distinct area of the UI can be resized to suit your needs by dragging the edge to the place you want.

Workspace



In the .NET UI, your application context is determined by a combination of domain and entity, called a workspace. Workspaces represent the area of your business where you are working. In this class, you are using the 10USA > 10USACO workspace, which represents the 10USA domain and the 10USACO entity.

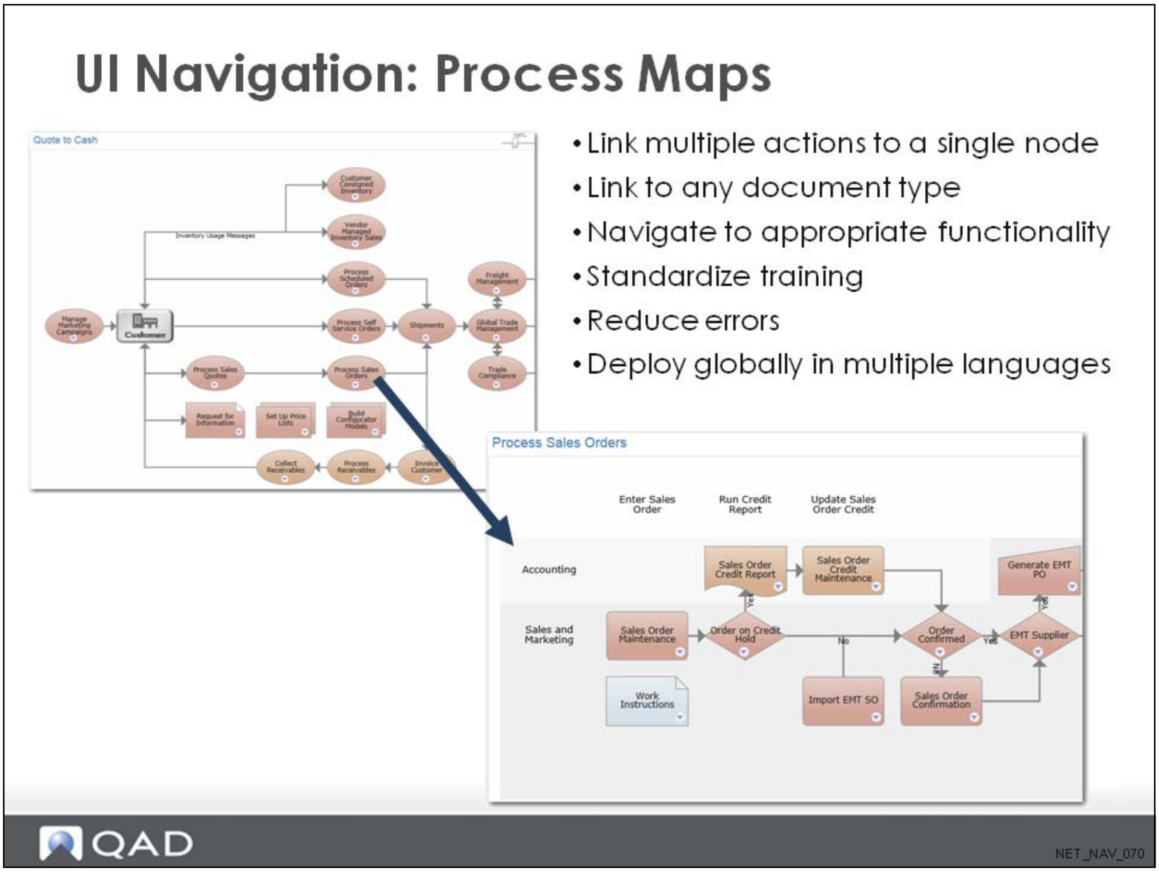
Most users only use one workspace and once selected, it is always active by default. When you exit the QAD NET UI, the active workspace is saved and displays when you log in again.

If needed—and you have the necessary access—you can select a different workspace that displays on the Workspace menu. The check mark signifies the domain that is currently active.

If you need to change workspaces regularly, you can also enable the workspace toolbar, shown above. Clicking a workspace name in the toolbar changes the current domain and entity. The toolbar is enabled using the Show Workspace Selector option on the Tools|Options menu.

For information on the domain and entity concepts, see *Training Guide: QAD Quick Start.*

UI Navigation: Process Maps



The .NET UI provides many ways to navigate and find programs you are interested in. You can select programs from the menu on the left or enter a program name or number the search field. These methods are shown in following slides.

This slide shows a top-level view of the process maps supplied with the .NET UI. These maps are graphic representations of workflows that can include links to programs, browses, documentation, URLs, or other maps.

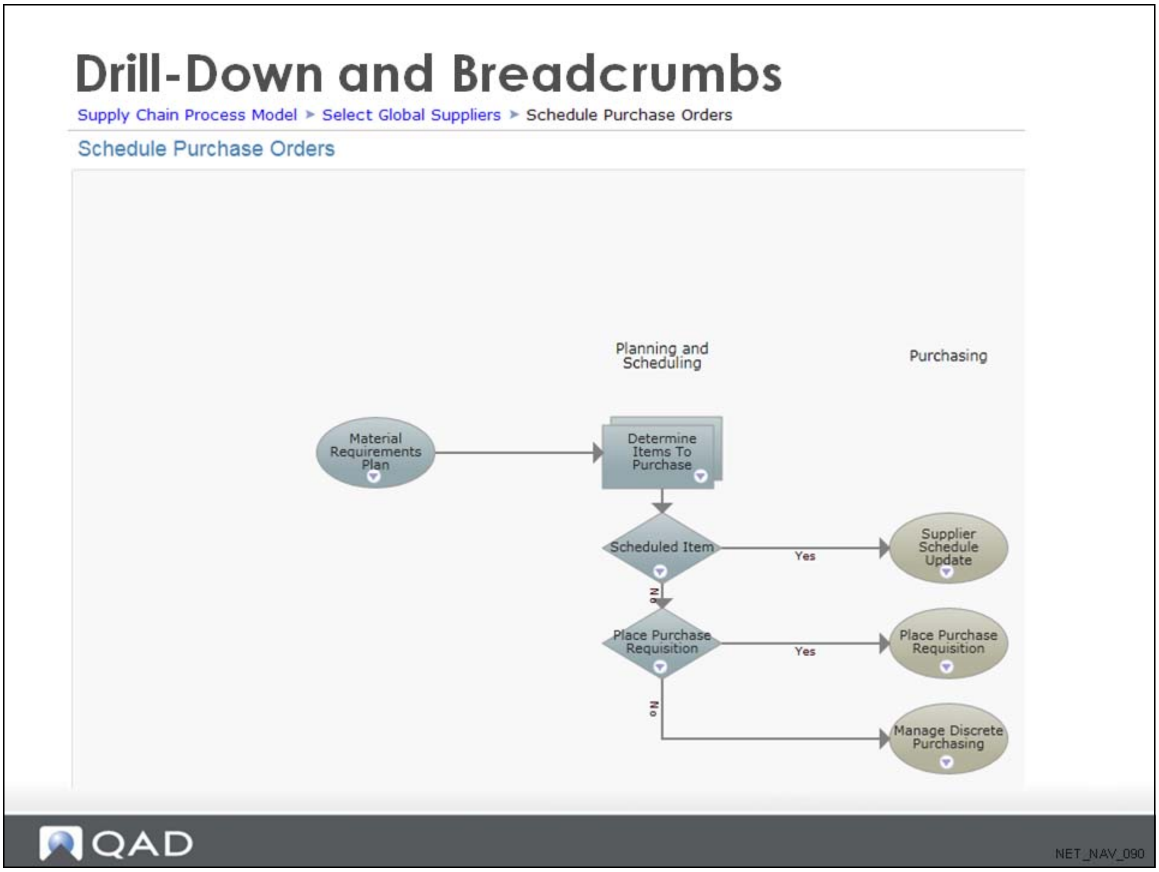
The .NET UI includes a Process Editor so that administrators can create their own maps that accommodate unique company standards. Users can edit process maps for any segment of the organization, or model unique environments in as much detail as appropriate.

The set of process maps supplied with the product has been carefully designed to incorporate best practice workflows tailored for various vertical industries.

Using process maps can:

- Improve end user performance by making process instructions visual and readily available, increasing awareness of standard procedures for routine and special tasks.
- Reduce errors and waste since users quickly access information regarding handling procedures, detailed documentation and instructions, eliminating guesswork.
- Increase global staff communication through maps that are globally available and editable to match regional language and operational demands.

Drill-Down and Breadcrumbs

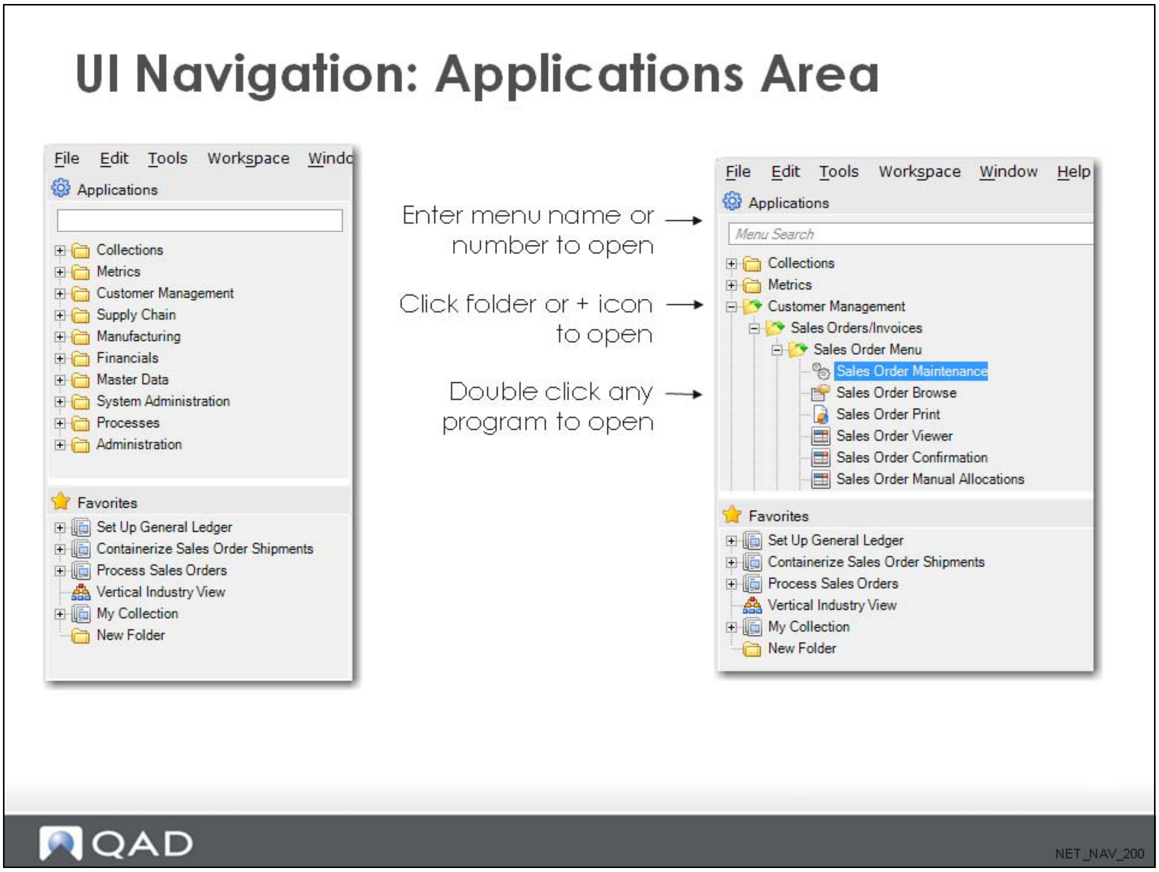


Processes are built with two basic components:

- 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 retrace your steps using the hyperlinked breadcrumbs at the top of the screen.

UI Navigation: Applications Area



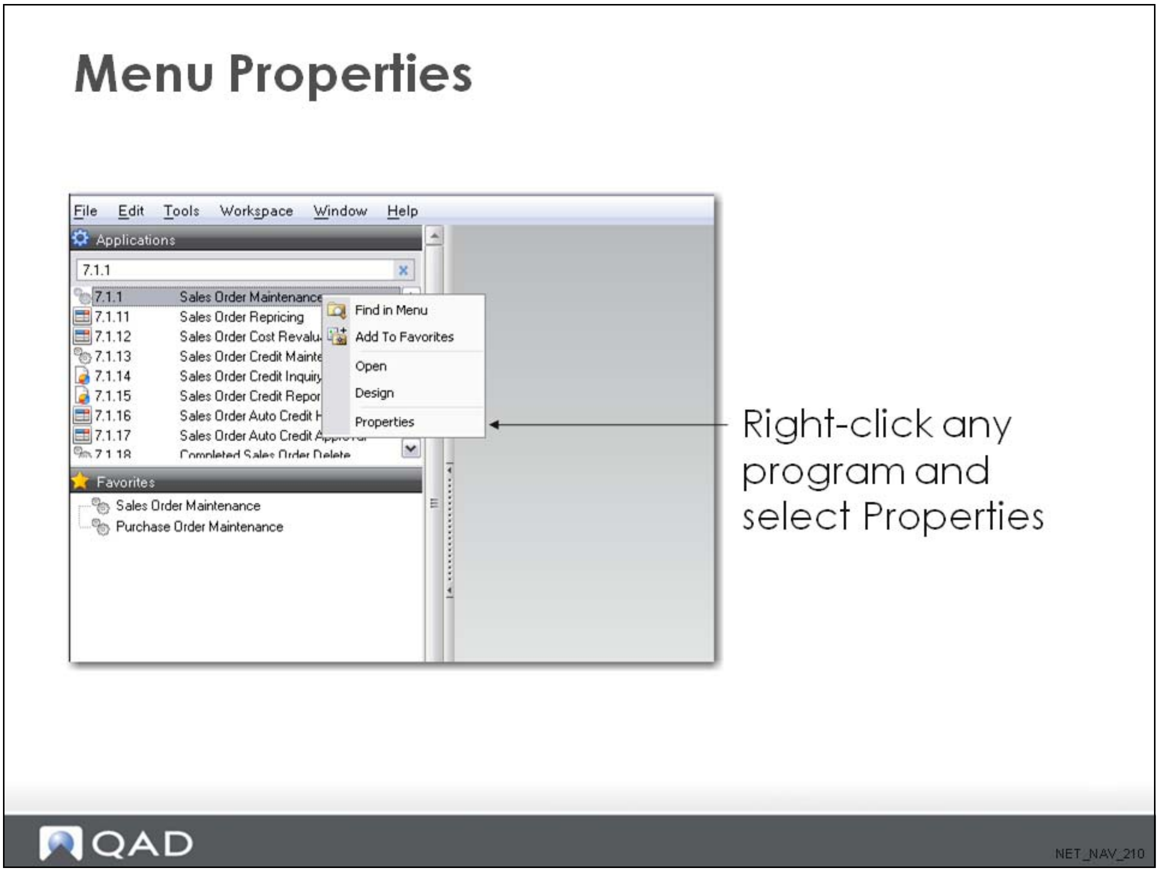
The Applications area displays the menu items for the QAD applications running in the QAD .NET UI. When the system is installed, the default menu organization is automatically loaded. Multiple screens can be open at any one time.

You can use the mouse to select menu items. You can use the menu search to:

- 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 (36.4.4.1 in EE, 36.4.4 in SE).

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.

Menu Properties



You can view the information about a menu item by right-clicking it and choosing Properties from the pull-down menu. The Properties window includes two tabs: General and Program.

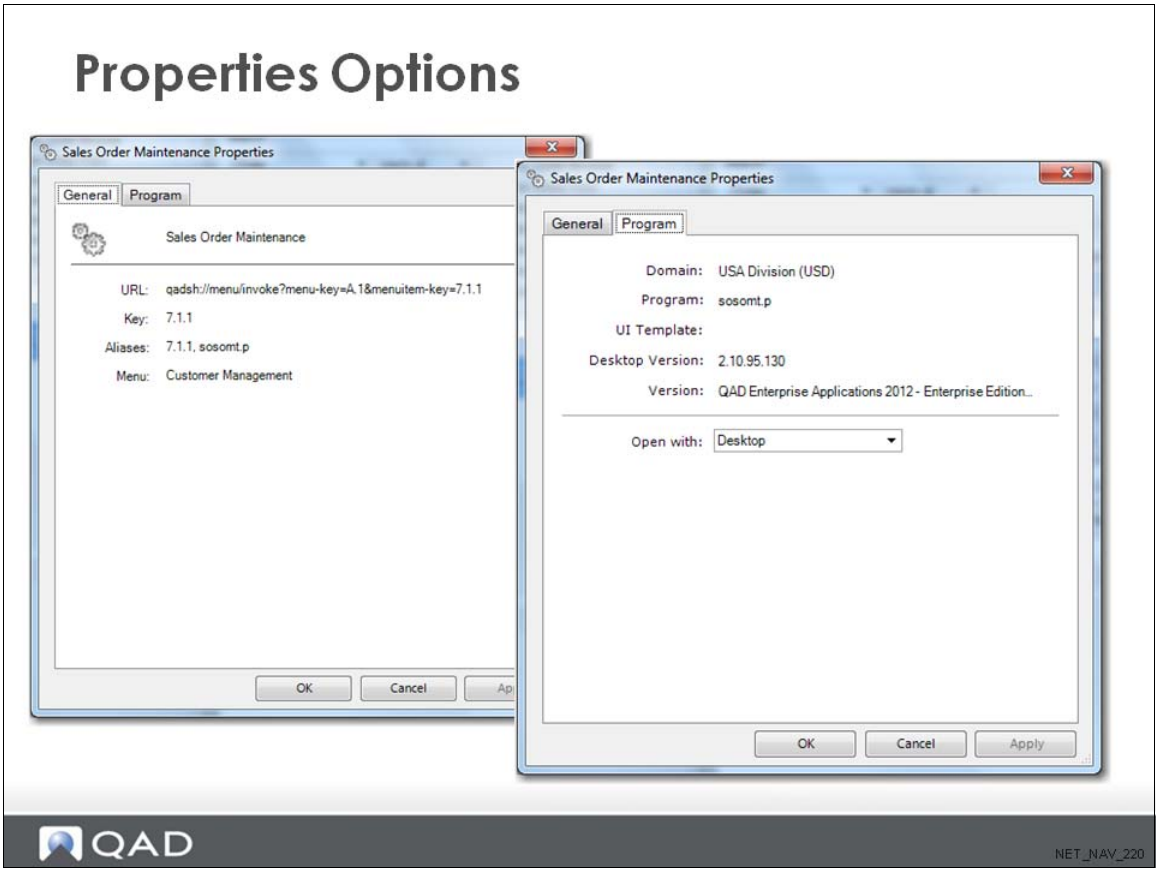
The other options on the right-click menu let you:

- Find the program in the menu system, so you can see its hierarchical position relative to other programs.

  Note The Find in Menu option changes to Collapse Menu when the hierarchy is already displayed.

- Add the program to the Favorites area (you can also do this by dragging).
- Open the program in the workspace so you can use it.
- Design a custom version of the program. This option is disabled unless you belong to a special group of users with access to the Configurable Screens feature. Configuring custom program screens is an administrative function that is covered in *Training Guide: QAD .NET UI Administration.*

Properties Options



The General tab displays:

URL. The QAD Shell URL for the program.

Key. The program number; 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.

The Program tab displays:

Domain. The current working domain and domain currency. If the specific program updates data that applies to all domains, All Domains displays.

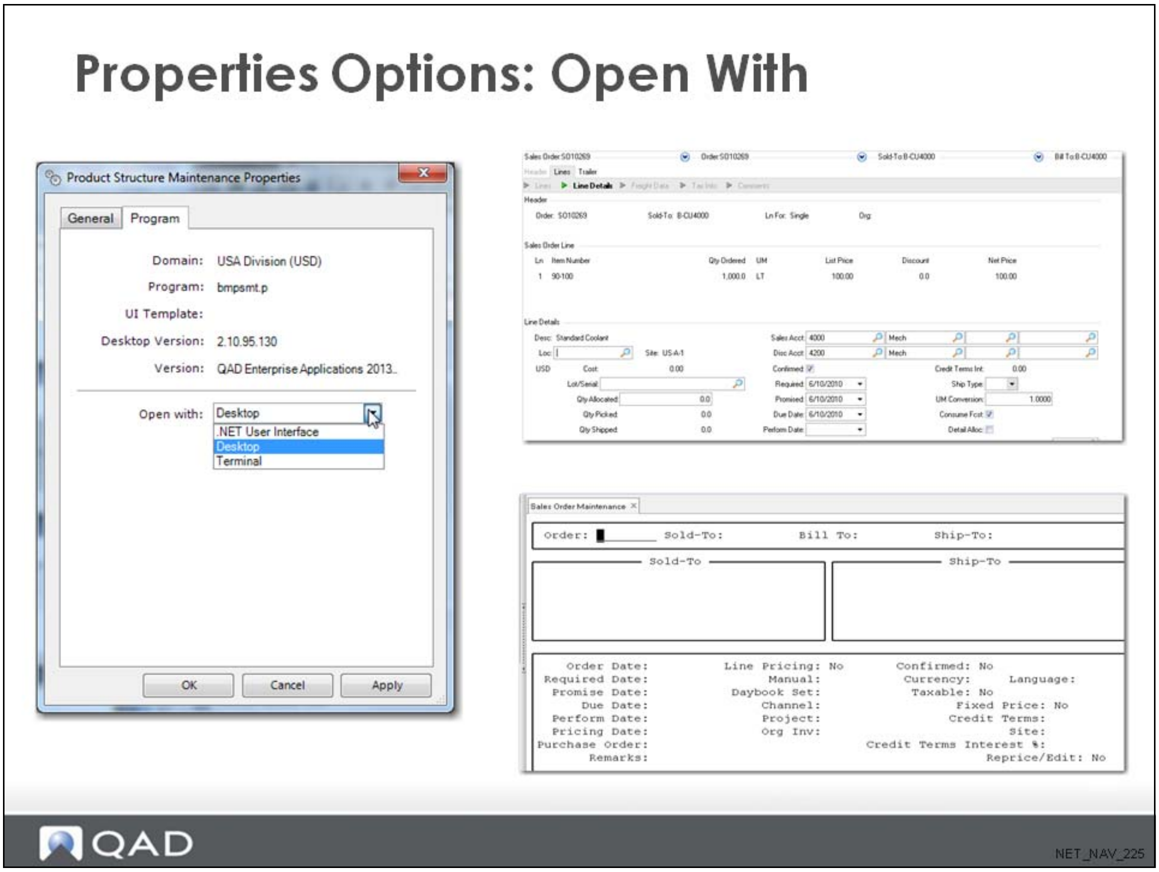
Program. The program name. For example, `sosomt.p` is the program name for Sales Order Maintenance.

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. The configurable screens feature is discussed in *Training Guide: .NET UI Administration.*

Desktop Version. Version details for the .NET UI.

Version. Product system version details.

Properties Options: Open With



Open with. Determines how the program will display in the workspace. Possible values are:

Desktop: The mode normally used by non-component programs in the .NET UI, which supports all of the enhanced navigation features.

.NET User Interface: This mode is supported by only a few programs that have been rewritten using a client-side plug-in that supports additional navigation features such as drag and drop.

Browse Viewer: This is the normal mode for browses that displays data in an interactive grid or chart format.

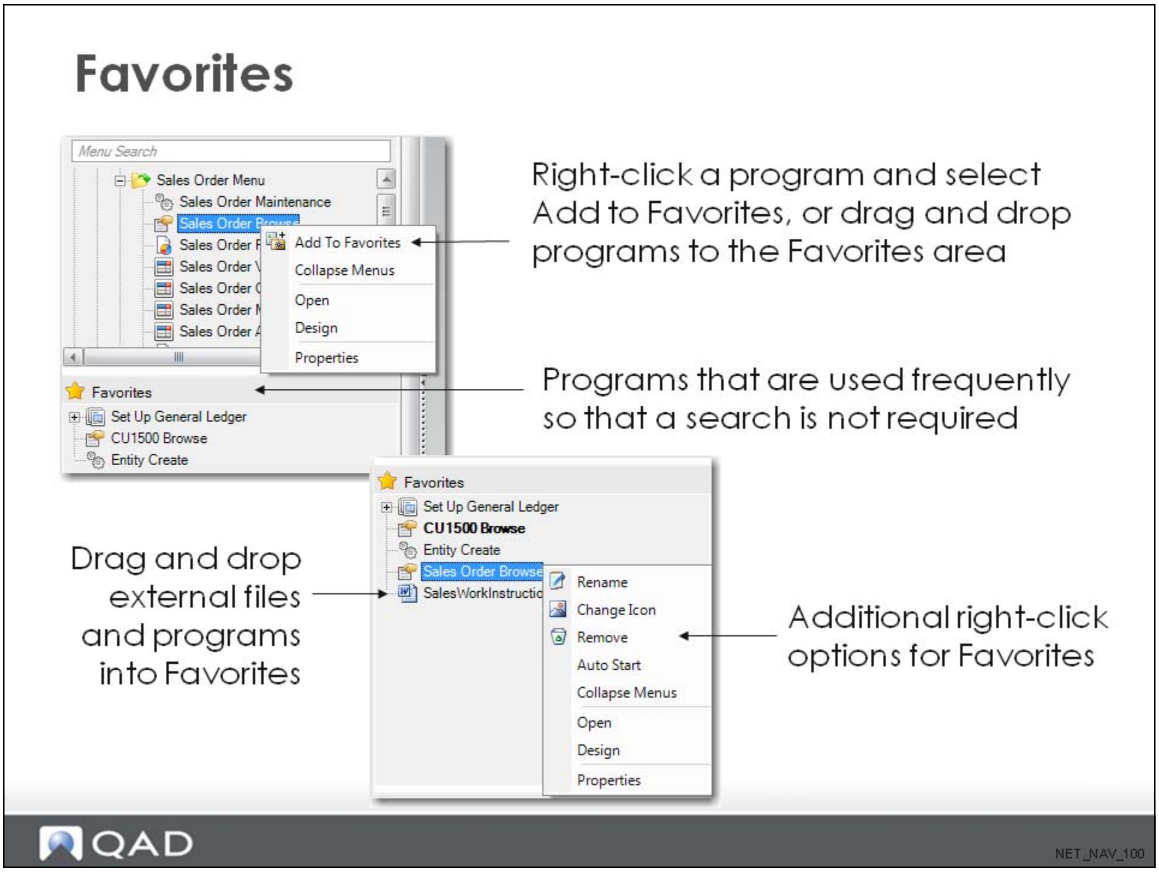
Terminal: This mode is a simple representation of a character-based screen.

You can change the Open with property from Desktop or Browse Viewer to Terminal according to your preference. If you do so, your choice will be retained from session to session.

Note You cannot change the Open with setting for component-based programs.

This slide shows Sales Order Maintenance as it displays in the QAD .NET UI (Desktop mode) and the more traditional Terminal version of the screen below. In Desktop mode, you can use point and click, tab, Next, Back or Header, Lines, and Trailer Tab to navigate.

Favorites



The .NET UI lets you customize the interface in many ways to make your work easier. One way to do this is to set up your own personal favorites menu. You can do this in two ways:

- Right-click a program in the top list and select Add to Favorites.
- Use your mouse to drag the program to the area below. This makes a copy of the menu item; you can still find it in the list above as well.

Remove an item from the favorites using the same steps: either right-click and select Remove or drag out of the Favorites.

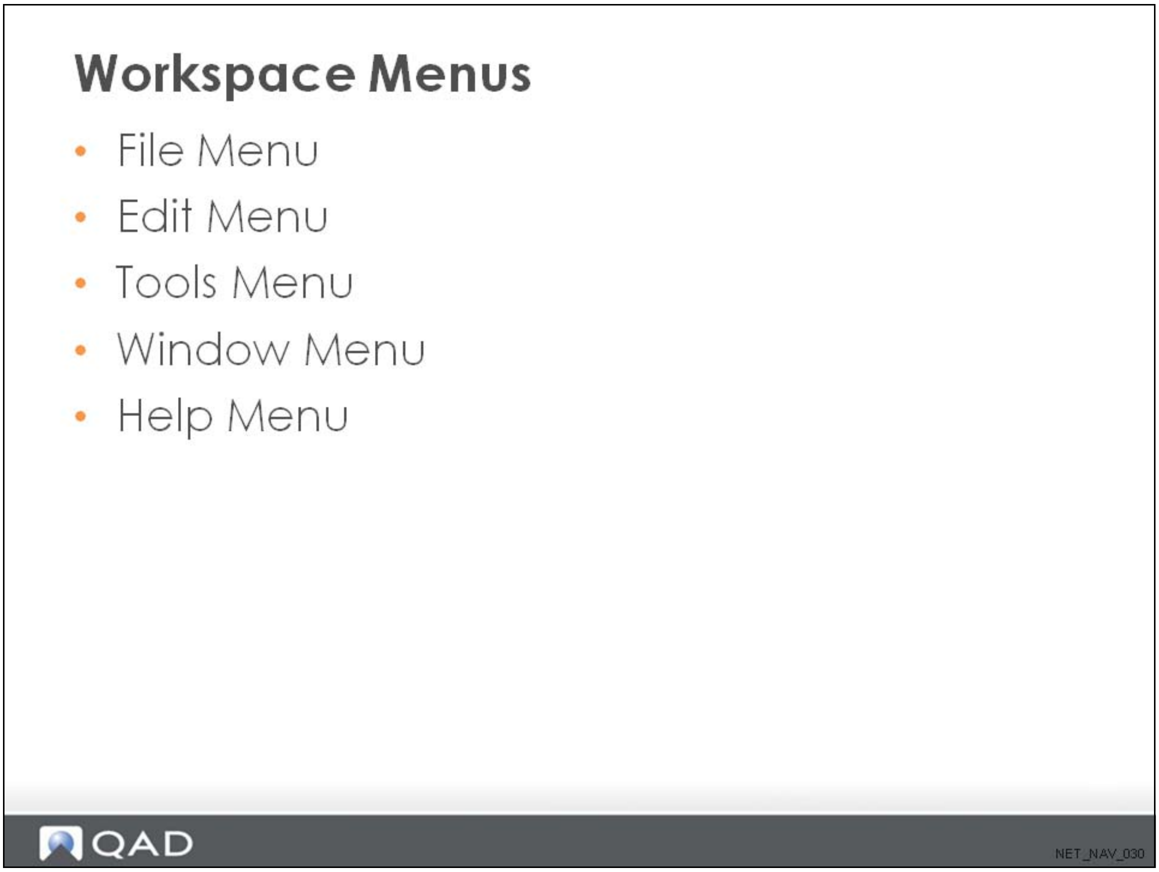
You can rename programs in your favorites so they are even more personalized. In addition, you can create folders and subfolders for organizing favorites by right-clicking in the Favorites area.

Two other options let you further manage favorites. You can:

- Select one or more items to start automatically when you log in using the Auto Start option. So if, for example, you typically log into the system to approve requisitions, you can have the Purchase Requisition Approval program start automatically every time you log in. Items selected for Auto Start display in bold text in the menu.
- You can change the icon associated with a program by loading the image you want to use.

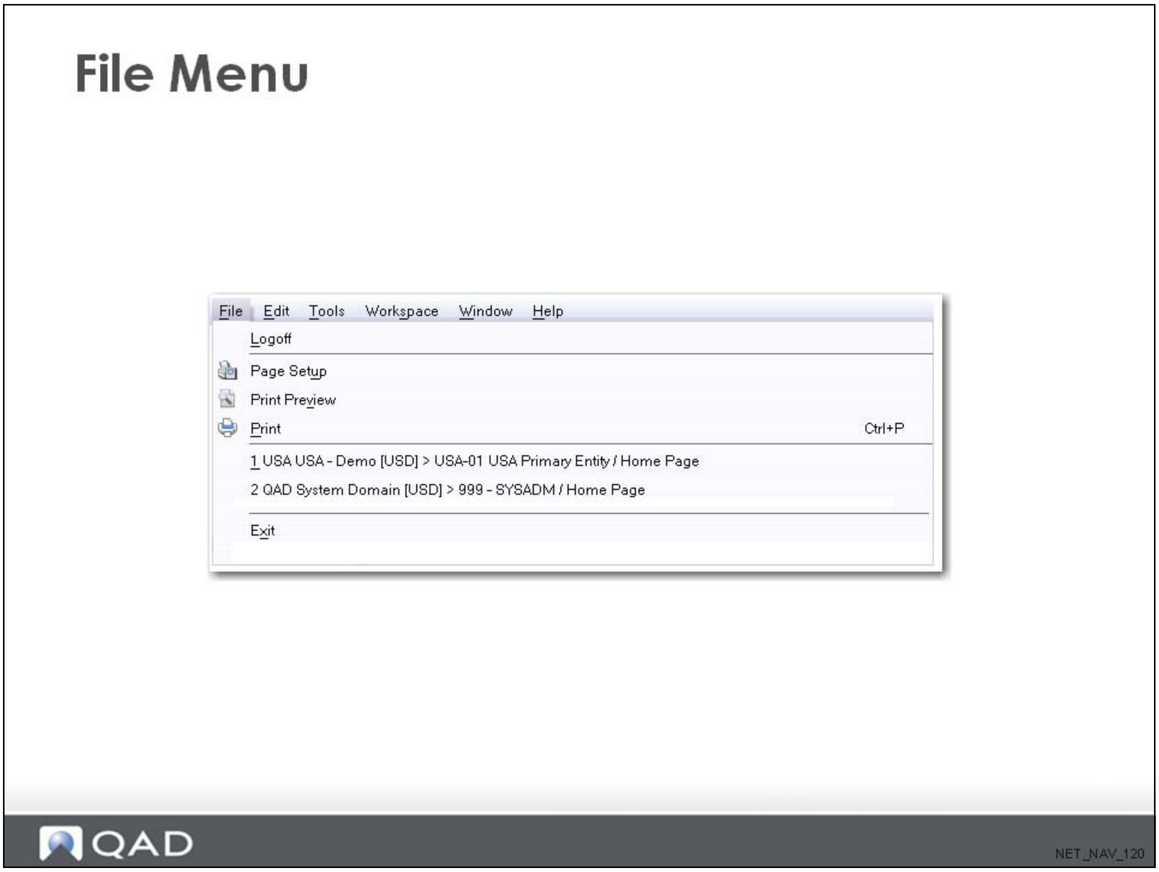
One other useful feature for favorites is that you can add external files by simply dragging and dropping them into the favorites area. This slide shows a Microsoft Word file with work instructions added as a favorite.

Workspace Menus



The menus on the menu bar of the .NET UI workspace provide many useful options, discussed next.

File Menu



The File menu commands include:

Logoff/Login. Log off from all applications running in the QAD NET UI. You can log in as a different user if security allows.

Page Setup. Defines print output for browses; this has no impact on maintenance programs.

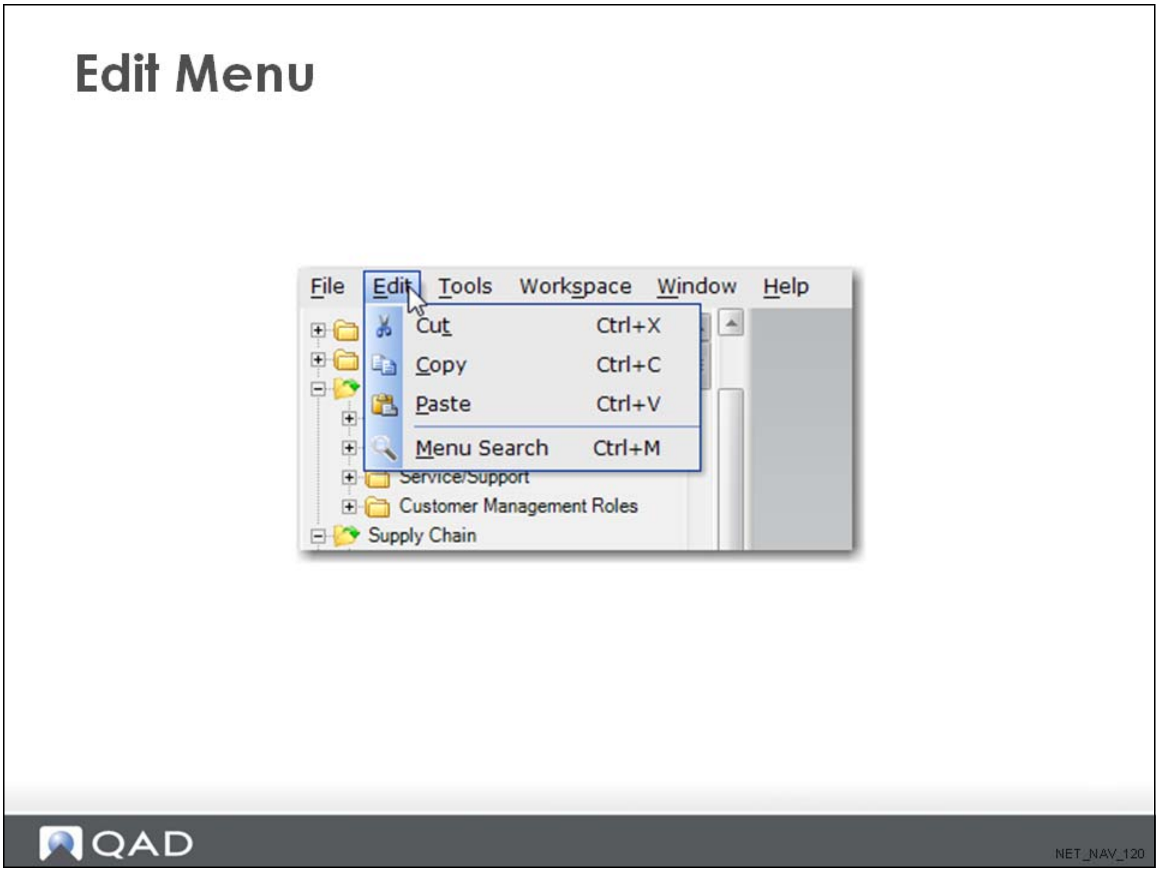
Print Preview. Generates a print preview of a browse prior to print.

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

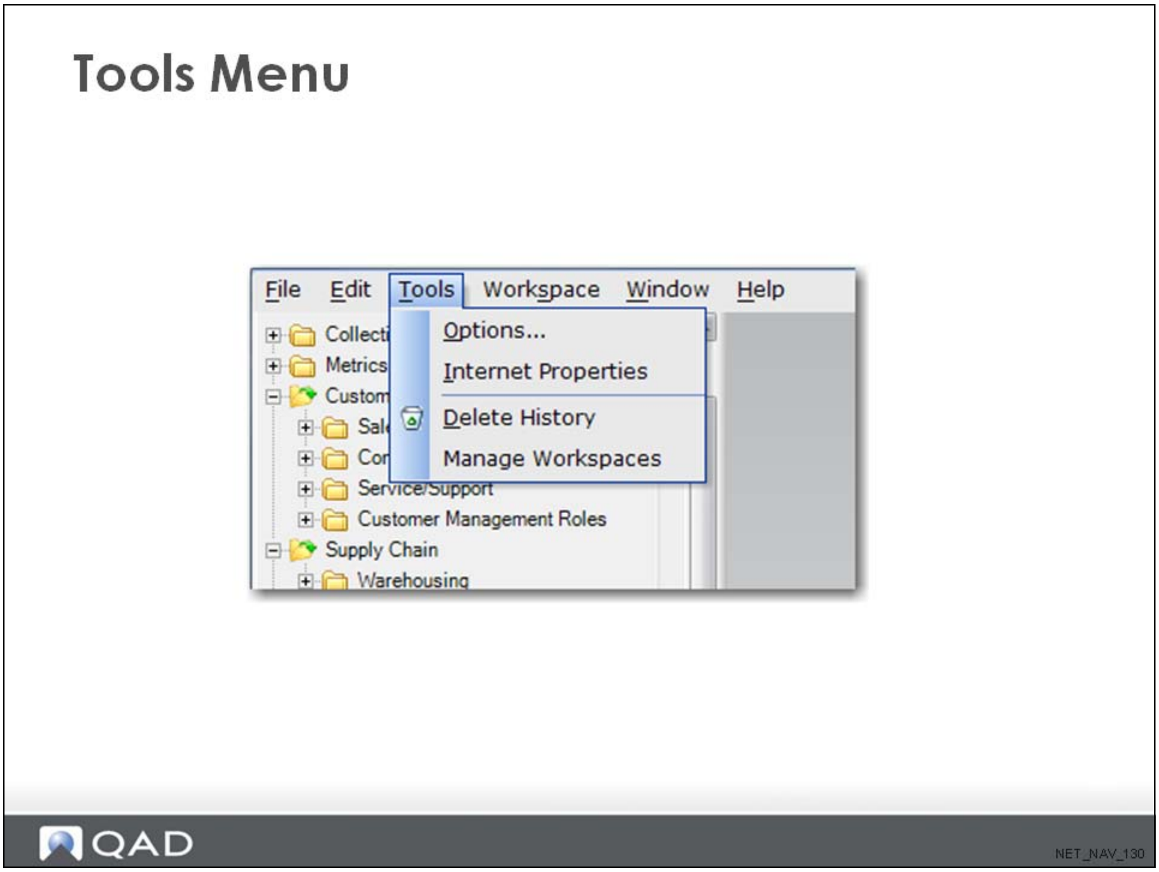


The Edit menu commands include:

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 menu search by using the shortcut Ctrl+M or select Menu Search from the Edit menu.

Tools Menu



The Tools menu commands include:

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.

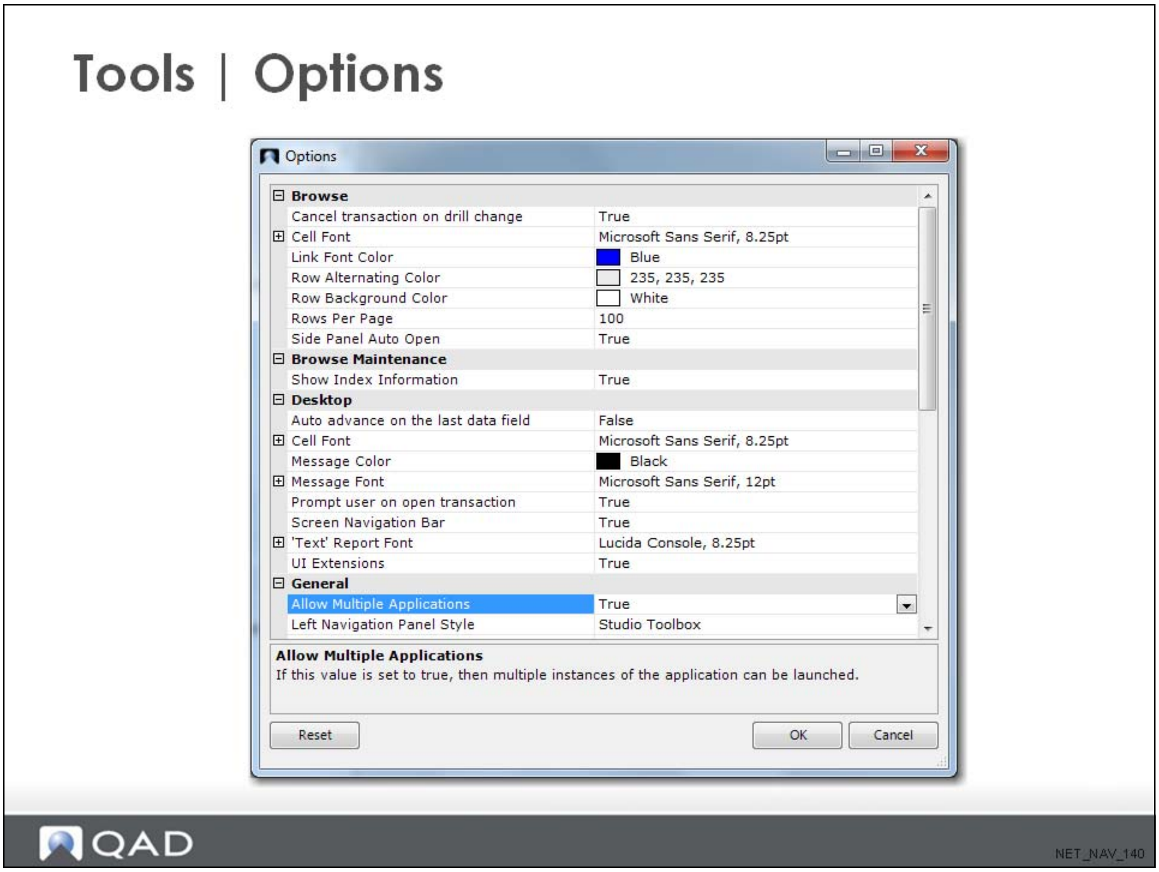
Internet Properties. Update the same settings that display when you select Internet Options from the Tools menu in Internet Explorer.

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



QAD .NET UI lets each user configure many different settings that affect the UI in these areas:

Browse. Configure settings for Cancel transaction on drill change, Cell Font, Link Font Color, Row Alternating Color, Row Background Color, Rows Per Page, Side Panel Auto Open.

Desktop. Configure settings for Auto advance on next data field, Cell Font, Prompt user on open transaction, Screen Navigation Bar, Text Report Font, UI Extensions.

General. Configure settings for Allow Multiple Applications, Left Navigation Panel Style, Show Workspace Selector.

Guide Me. Enabled.

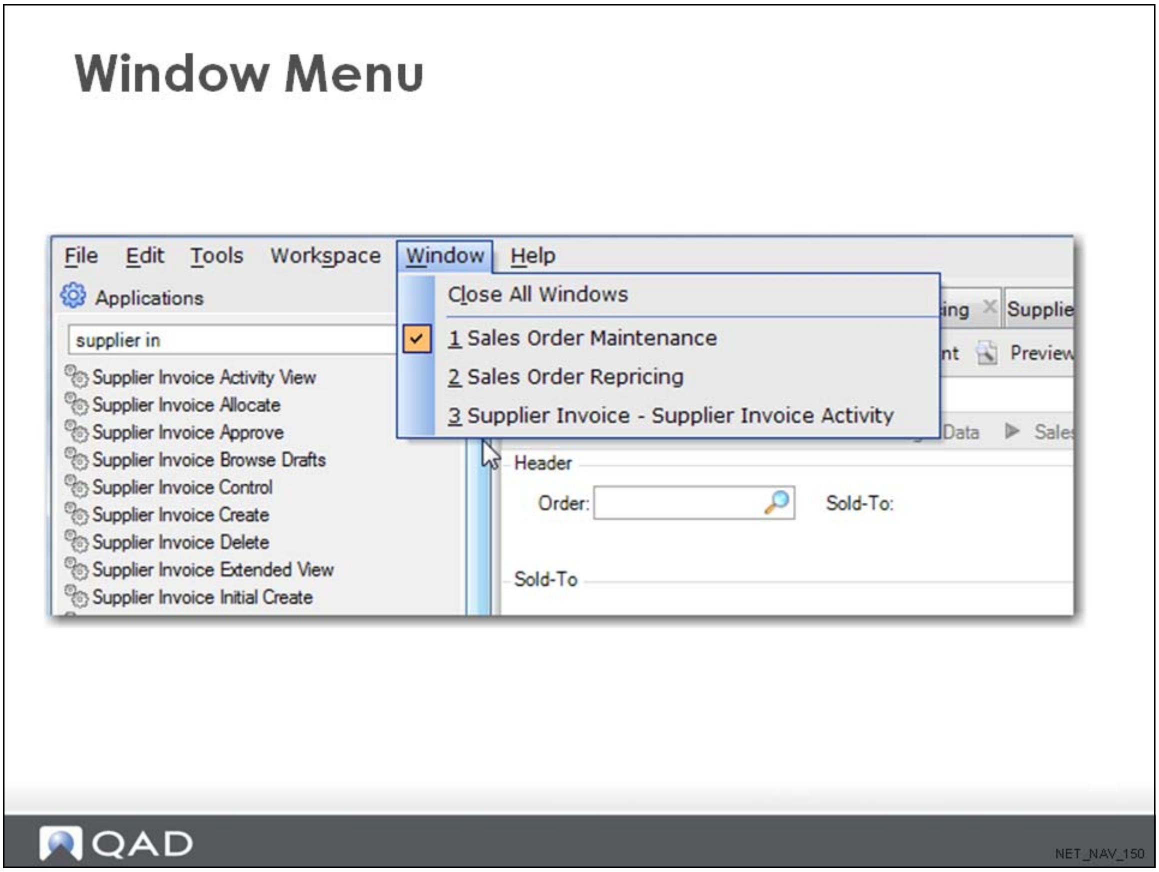
Home Page. Enable Home Page, Home Page URL.

Messaging. Configure settings for Auto Complete Recipients Textbox, Display Alerts, Empty Deleted Folder Frequency, Poller Frequency.

Metrics. Image, Title.

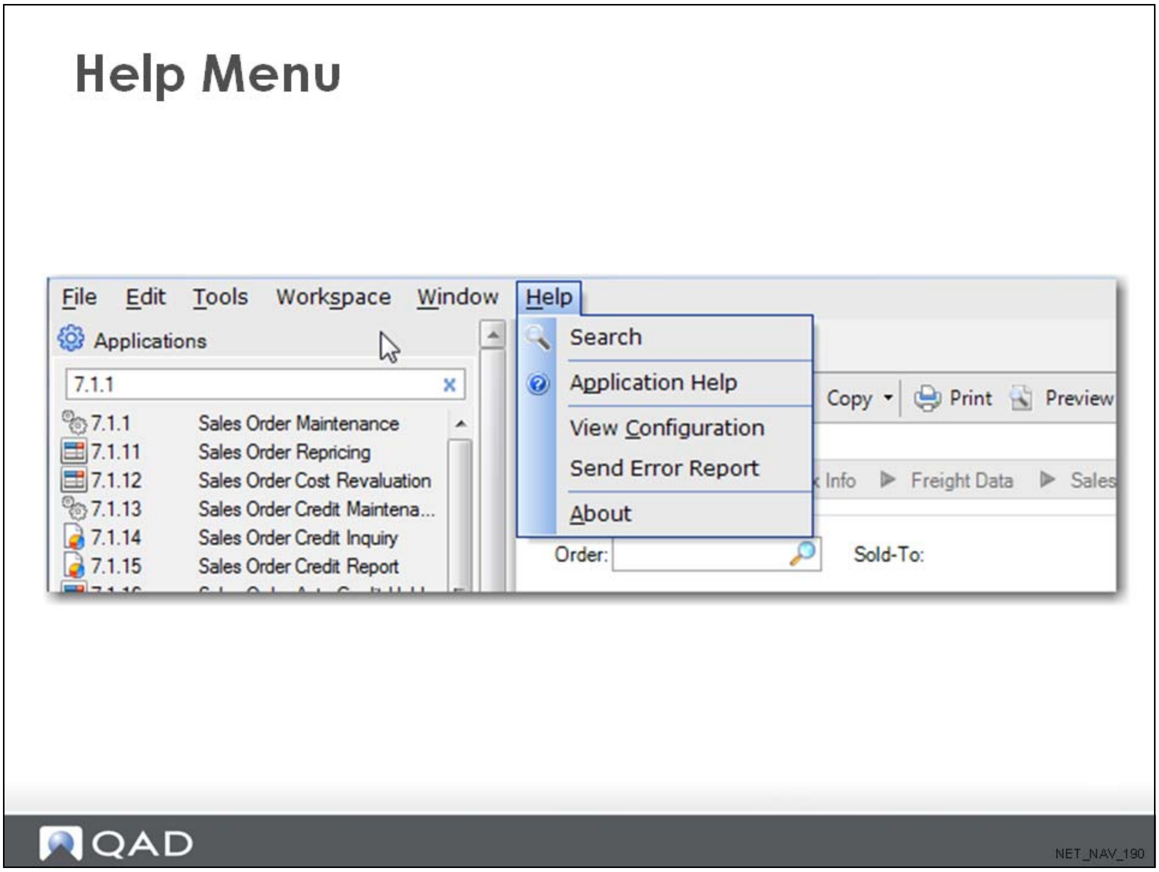
Terminal. Background Color, Bold Color, Font, Foreground Color.

Window Menu



This menu displays a history list of programs in the order in which they were opened. Selecting 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. Help is discussed in more detail in Chapter 3, "Help in the QAD .NET UI," on page 47.

The Help menu commands include:

Search. This option displays the default search page.

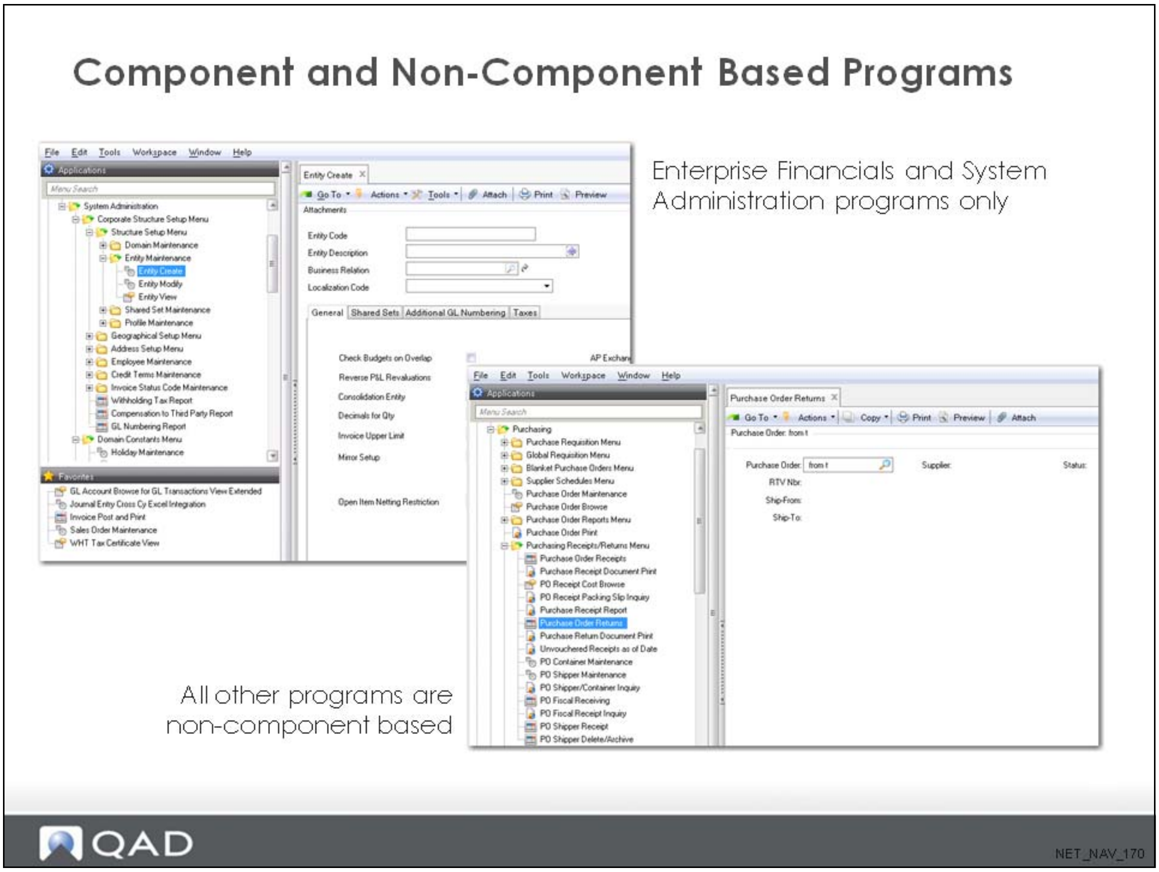
Application Help. This option is available when your cursor is placed within a non-component based field or screen. When you then select Application Help, field or procedure help is displayed for the field or screen.

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.

Send Error Report. Use this option to save or send an error report. You can view the report, which includes QAD .NET UI configuration information and log files and enter additional information about what you were doing when the problem happened. Optionally, you can enter your e-mail address and send a screen shot and either Send or Save.

About. Displays 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.)

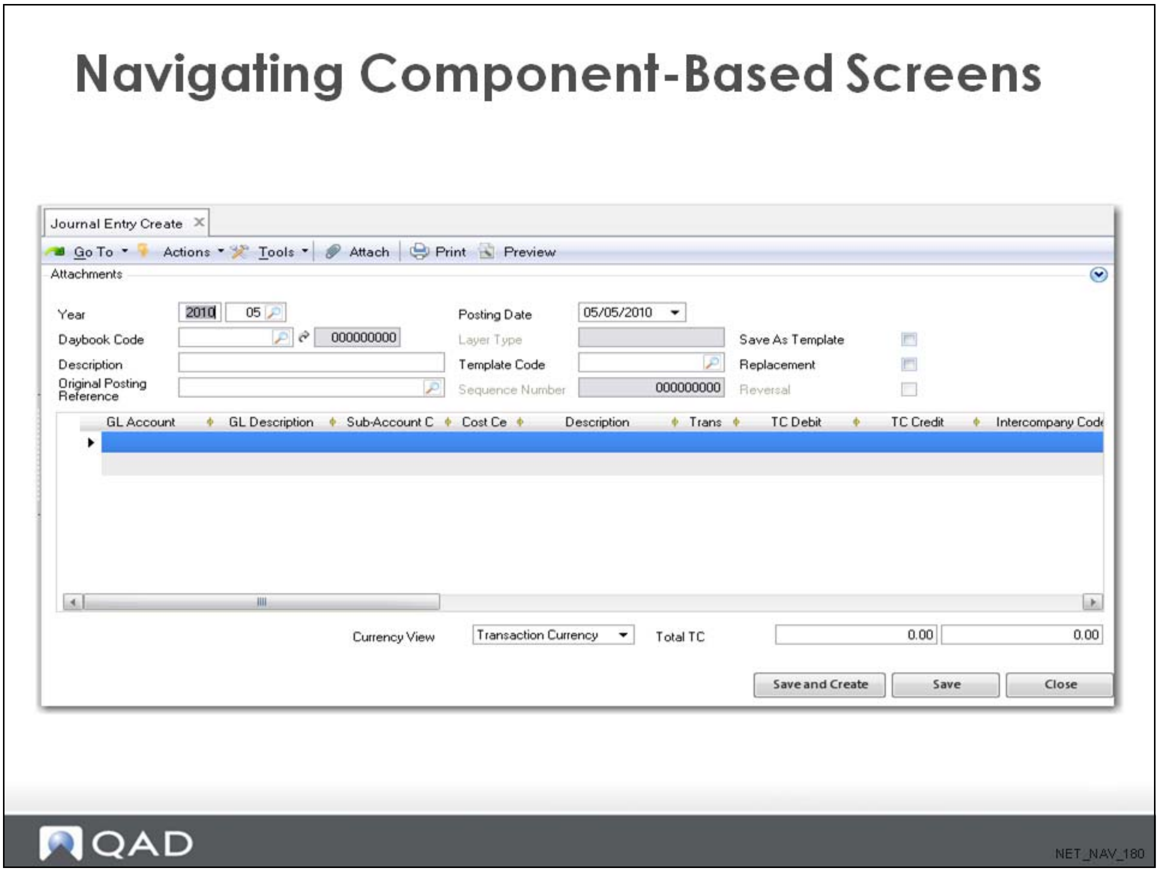
Component and Non-Component Based Programs



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.

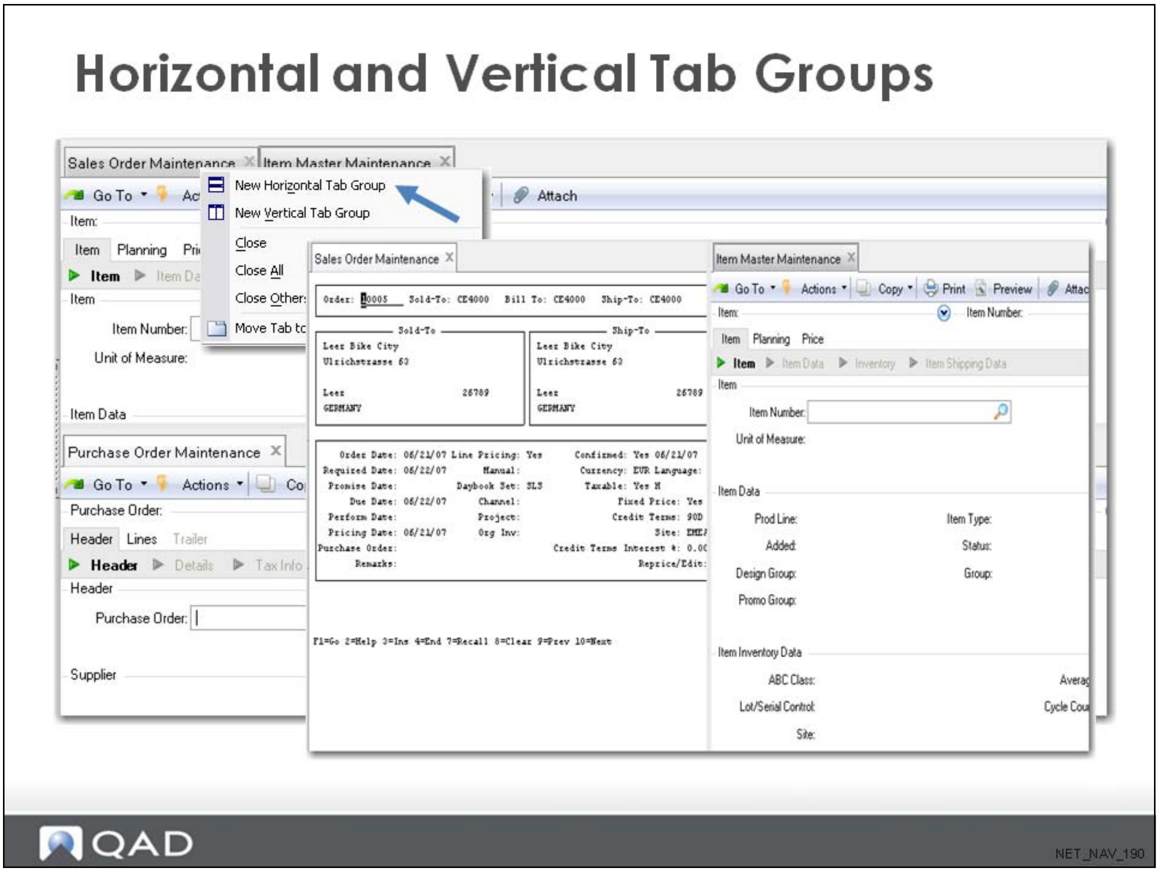
Chapter 4, “Programs in the QAD .NET UI,” on page 59 provides details about using programs.

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.

Horizontal and Vertical Tab Groups



You can choose two ways of viewing multiple screens in the application area. This works especially well with the QAD .NET UI browse programs.

This slide shows the Process Sales Order menu collection, which groups all of the programs that you might need to use to complete activities related to an order. The grouping is facilitated by defining tab groups. Right-clicking the Process Sales Order tab displays the menu in this slide.

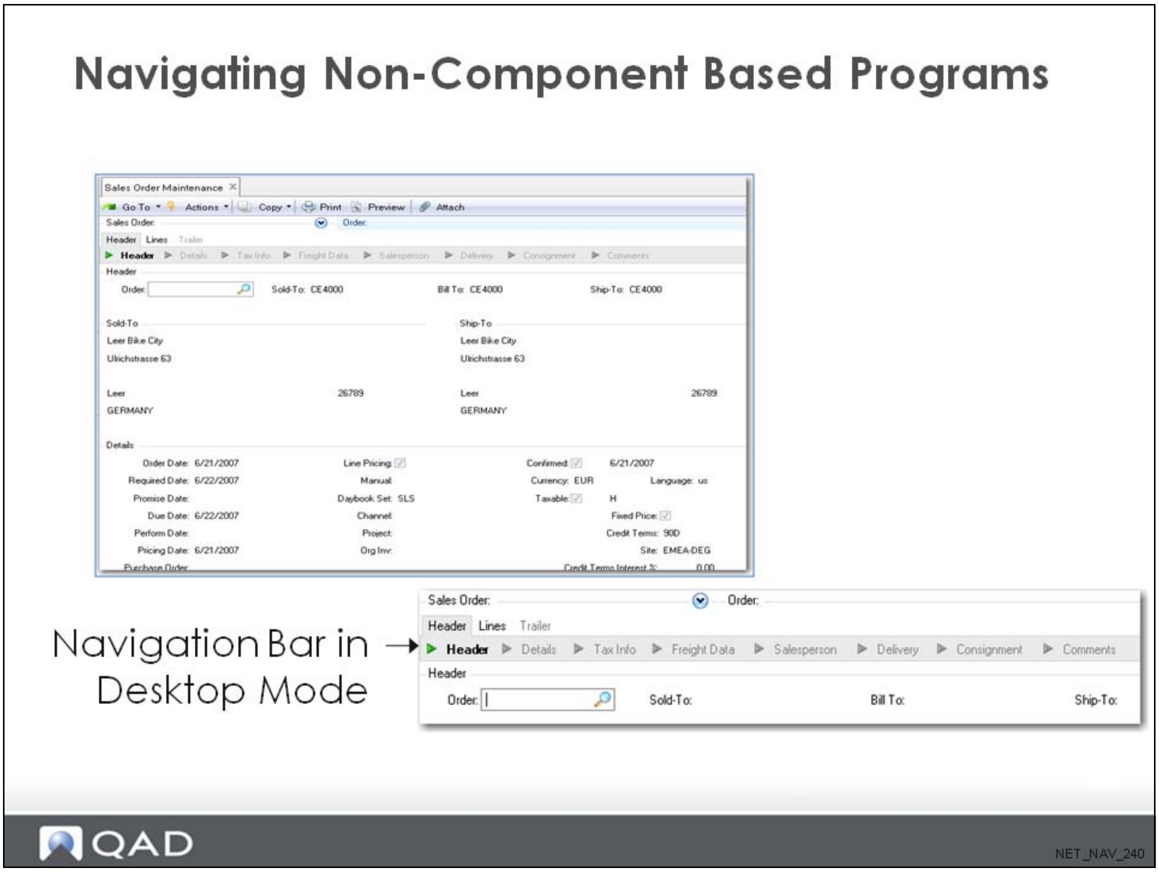
Tab groupings help you organize open programs in either horizontal or vertical layout.

- Click New Horizontal Tab Group to split the screen horizontally and move this program to the new area.
- Click New Vertical Tab Group to split the screen vertically and move this program to the new vertical area.

You can only use horizontal or vertical groups, not both. But you can create as many of one type of group as you want.

You can also detach a tab from the application area and display it in a new window. Right-click the tab and choose Move Tab to New Window or enter Ctrl+F11. To move a tab in a separate window back to a tab in the application area, enter Ctrl+F11.

Navigating Non-Component Based Programs



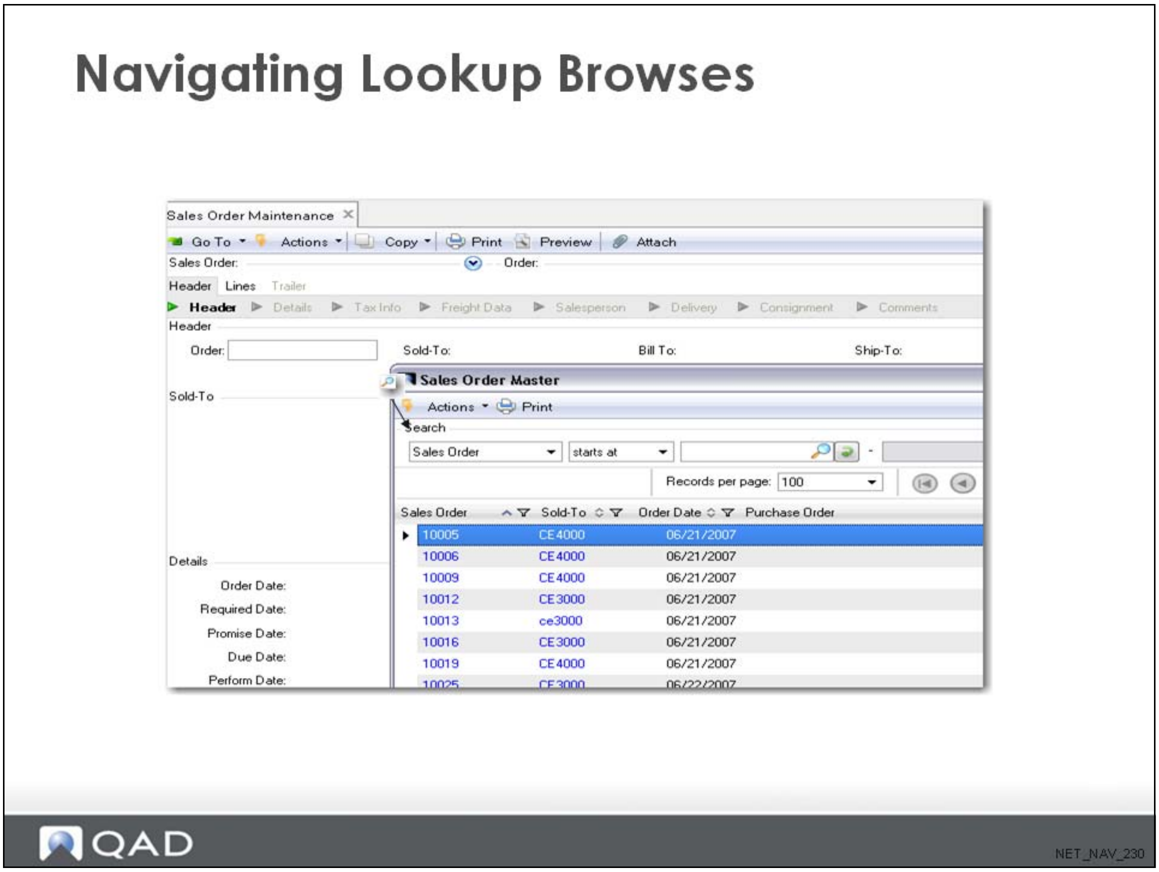
Because non-component based screens are a rendering of the character UI, you can navigate these screens using the same keyboard commands. You can also use mouse clicks to select fields and enter data.

When some programs open in Desktop mode, a navigation bar is displayed along the top of the screen indicating where you are as you proceed through the program screens. Not all programs have this bar; it is typically used with complex transactions such as order creation.

For example, the screen for Sales Order Maintenance includes a navigation bar indicating the parts of a sales order: Header, Lines, Trailer. Within each major section, you can navigate using the bar to specific subareas. When you are displaying the header of a sales order, you can navigate directly to Details, Tax Info, Freight Info, Salesperson, Delivery, Consignment, or Comments by clicking the label in the navigation bar.

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

Navigating Lookup Browses

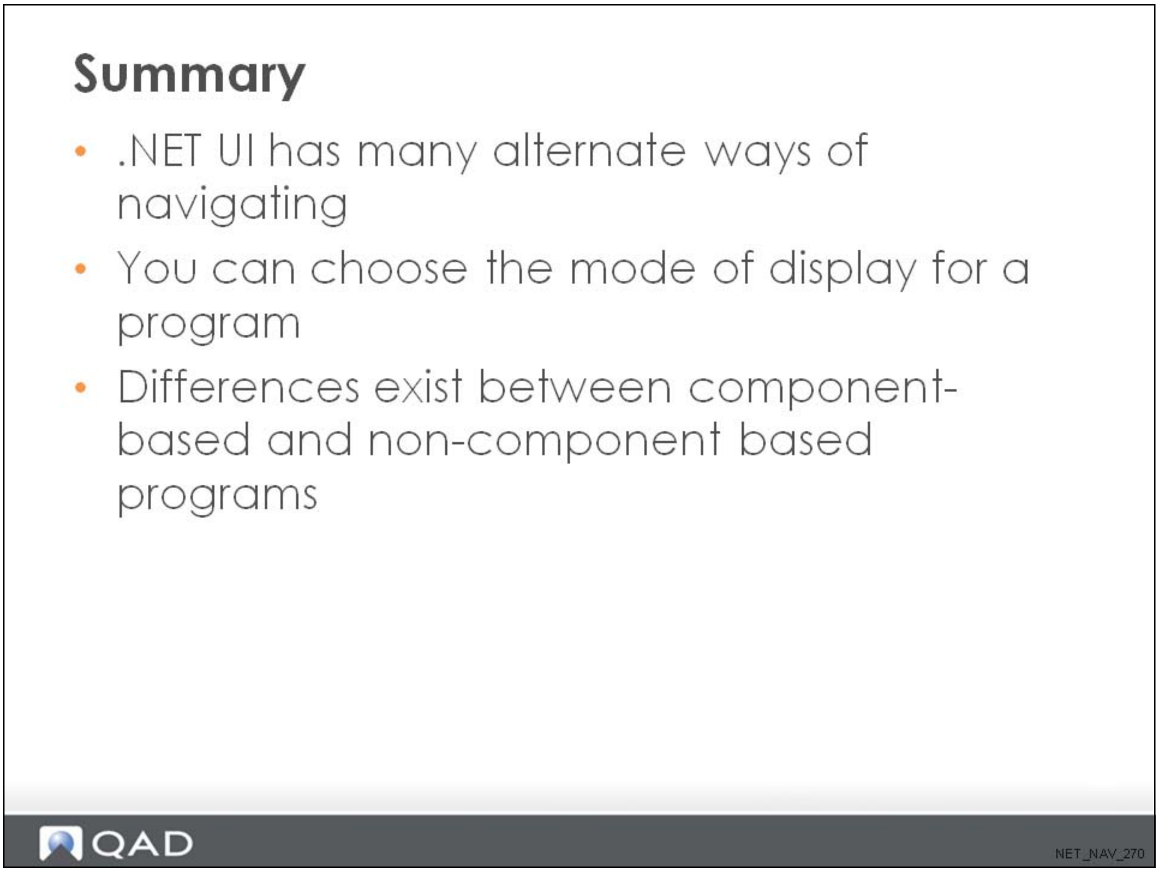


Many fields display a small magnifying glass icon on the right of the input area. This indicates that a lookup is associated with the field. Click the icon or use the Alt+L keyboard shortcut to display the lookup. The lookup lists valid values for the field.

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

Browses on the menu, called power browses, include more complex navigation features. Browses are discussed in more detail in Chapter 5, “Browses in the QAD .NET UI,” on page 81.

Summary


Summary
.NET UI has many alternate ways of navigating
You can choose the mode of display for a program
Differences exist between component-based and non-component based programs
QAD
NET_NAV_270

Exercise and Knowledge Check

These exercises and discussion questions will help you become familiar with navigating the user interface.

1. Using each of the Process maps (Vertical Industry, End-to-End, and Supply Chain), drill down until you can create a sales order. Which view seemed easiest to you?

2. Create a custom menu by:

   a. Right-clicking a menu item and selecting Add to Favorites.

   b. Drag several menu items into the Favorites section of the UI.

3. Open the following four programs:
   - Sales Order Maintenance
   - Sales Order Shipments
   - Sales Order Browse
   - Sales Order Credit Browse

   Right-click on Sales Order Browse and create a new tab group. Add Sales Order Credit Browse to the tab group with the other browse. Can you see how this arrangement could help you when processing a sales order?

   Right-click on Sales Order Browse again and select Close All.

4. Change the way a program displays:

   a. Select Customer Data Maintenance from the menu.

   b. Right-click and select Properties.

   c. On the General tab, note the menu number associated with this program. What is this field labeled?

   d. Click the Program tab and change Display with to Terminal. Click OK.

   e. Type the menu number (2.1.1) in the search and press Enter.

   f. Compare the two program displays by selecting a customer record and moving through the frames. How is this UI different than the normal Desktop mode?

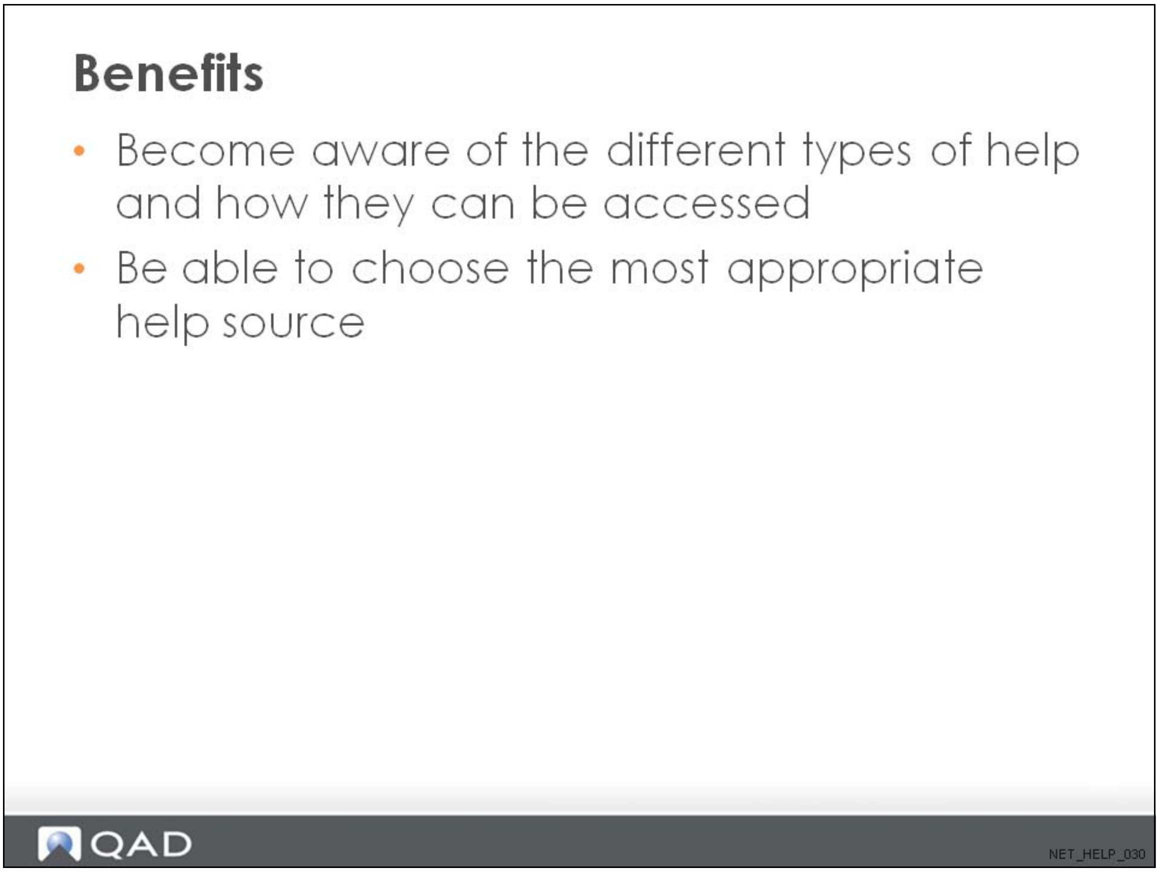
Chapter 3

Help in the QAD .NET UI

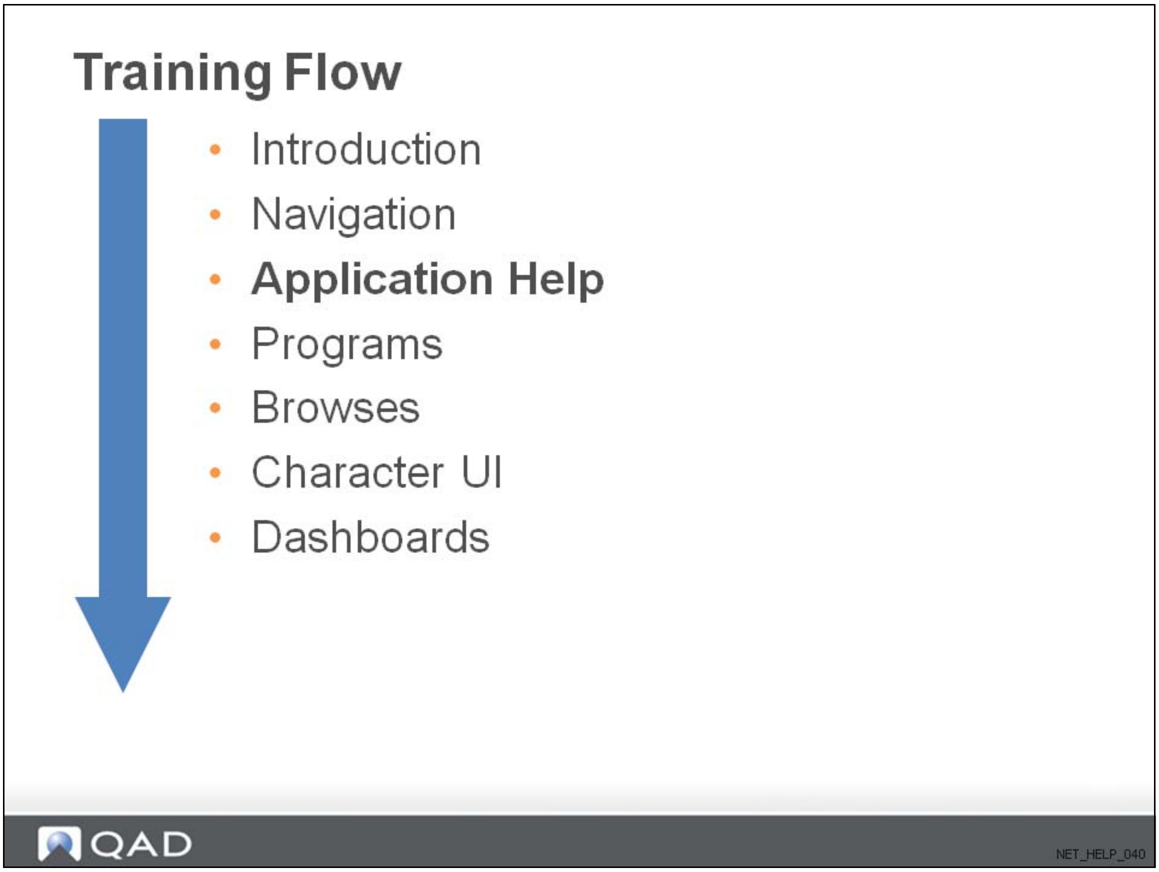
Objective


Objective
• Learn about the extensive help capabilities of the QAD .NET UI:
- Character UI Help
- Application Help (F1 or Help | Application Help)
- QAD Search (Help | Search)
- QAD Guide Me
- QAD Document Library http://www.qad.com/documentlibrary/
QAD
NET_HELP_020

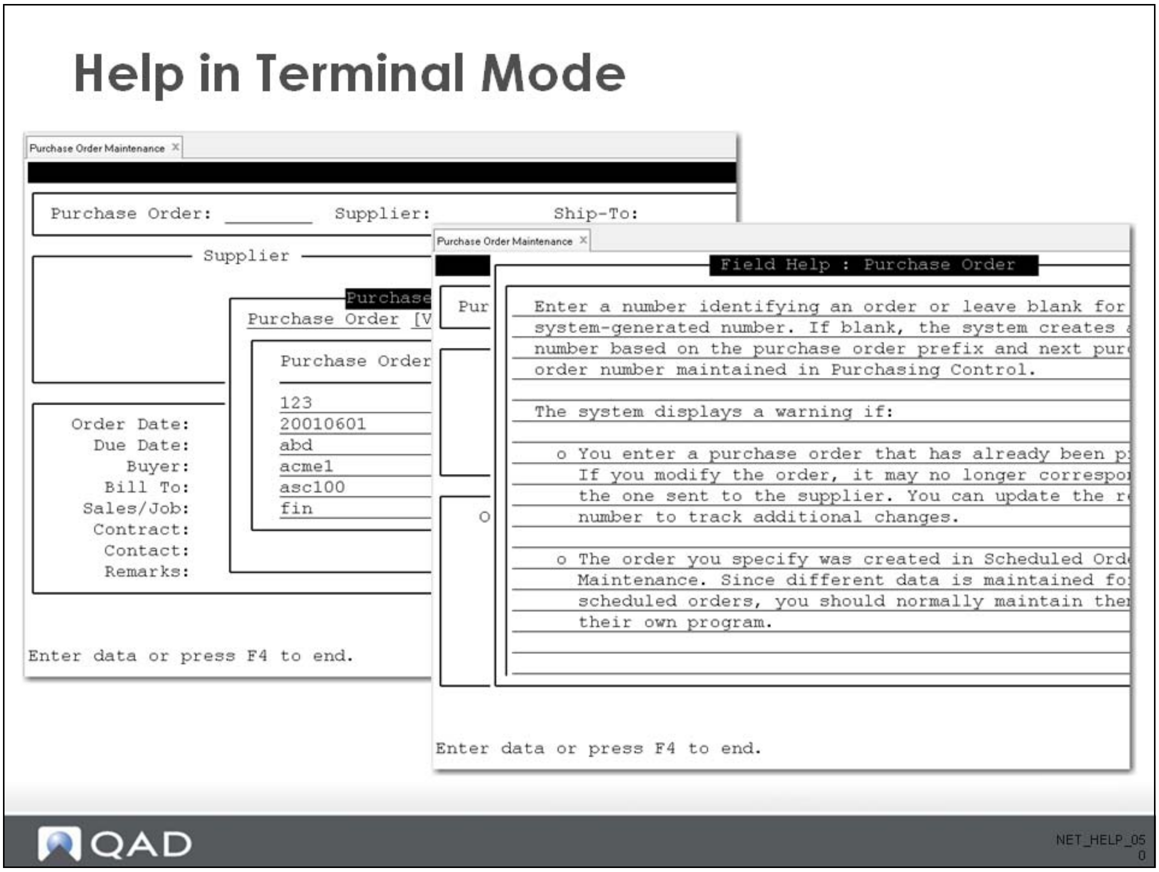
Benefits


Benefits
• Become aware of the different types of help and how they can be accessed
• Be able to choose the most appropriate help source
QAD
NET_HELP_030

Training Flow



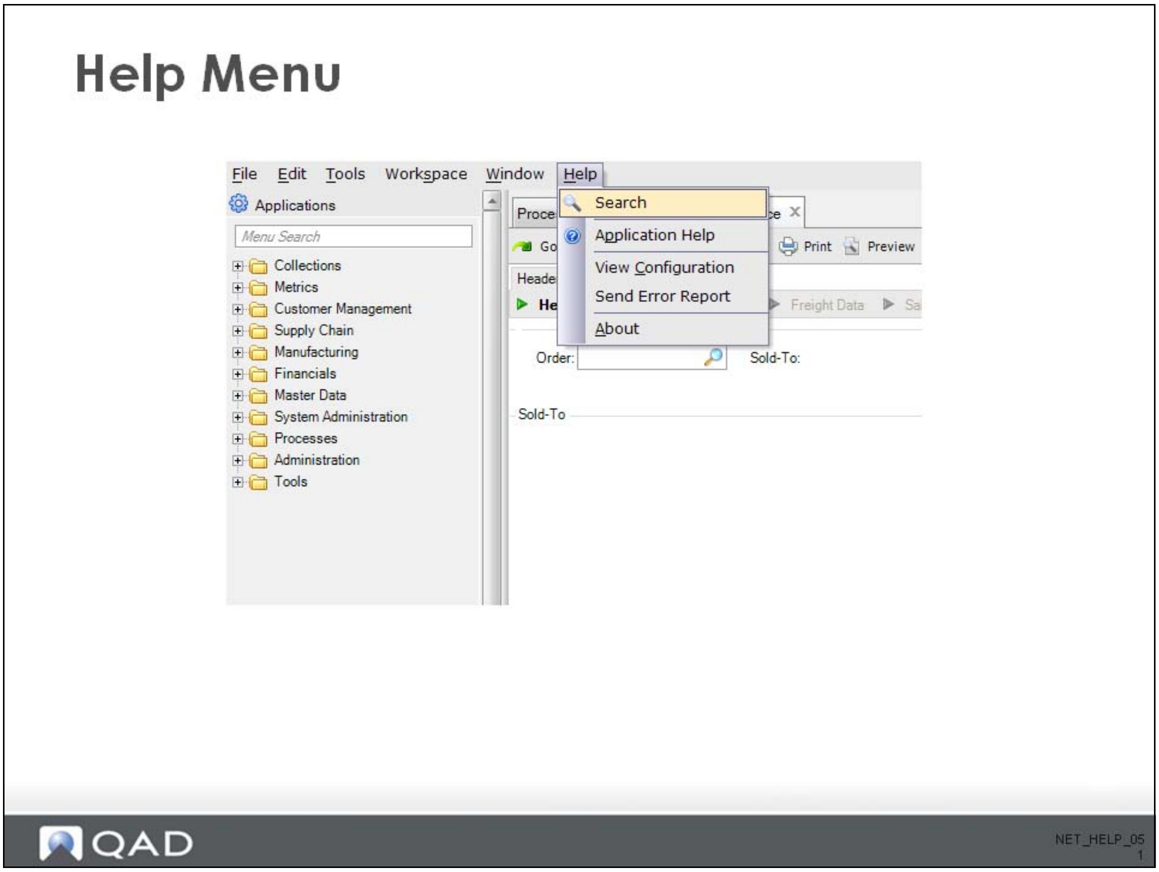
Help in Terminal Mode



Access help in terminal mode by pressing F2.

- 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.

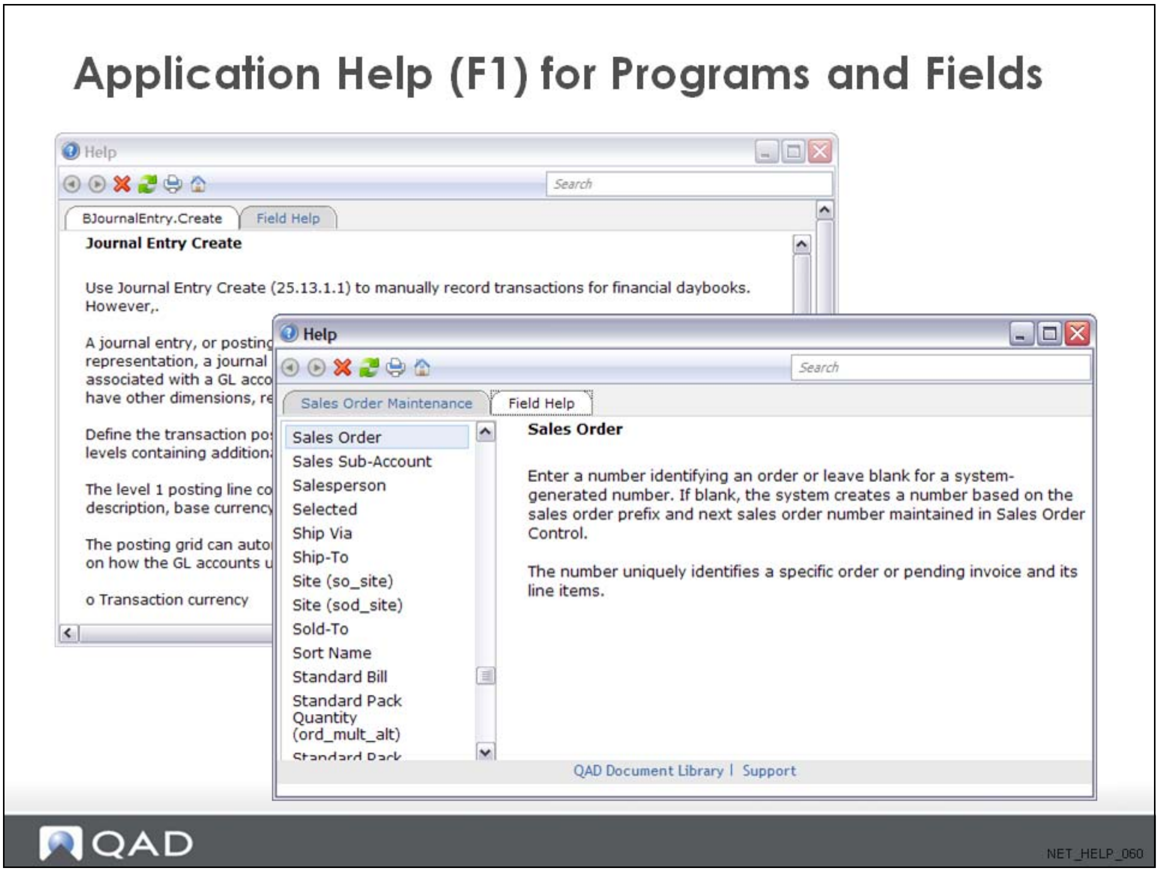
Help Menu



Options on the Help menu include:

- Search displays a panel where you can search field or program help or both using terms and operators.
- Application Help is available when your cursor is in a field. Choosing it displays the relevant field or program help. You can display the same information by pressing the F1 key.
- View Configuration opens a window that displays various configuration settings that cannot be directly changed. This information can by useful for system diagnostics.
- Send Error Report lets you save or send an error report that includes QAD .NET UI configuration information and log files. You can enter additional information about what you were doing when the problem happened. Optionally, you can enter your e-mail address and send a screen shot.
- About displays information about the version of QAD .NET UI that is running, the time the session was started, and the total amount of physical memory being used.

Application Help (F1) for Programs and Fields

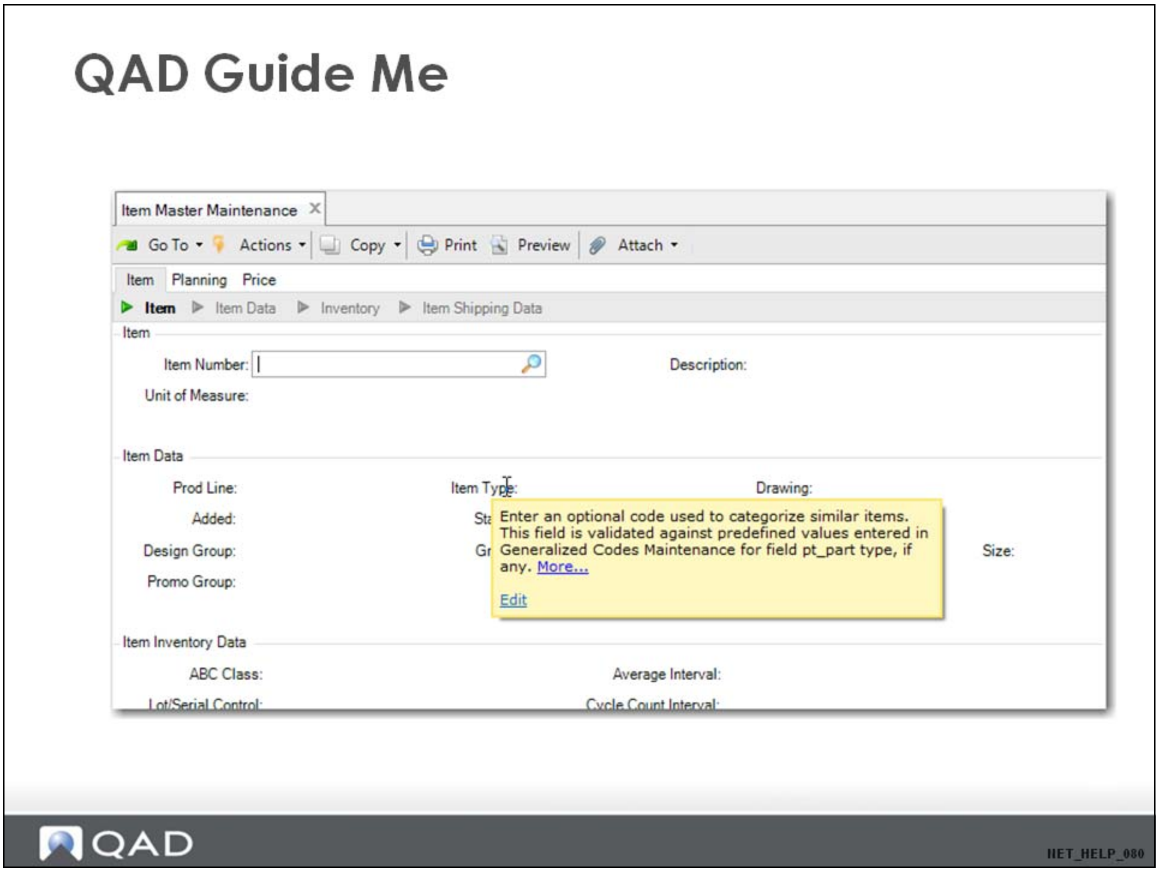


When your cursor is in a program field, you can press F1 or choose Help | Application Help to display online help. Help is organized into two tabs:

- The Field Help tab displays a list of fields associated with the current program. Help for the field where you cursor is located initially displays in the help panel.
- The other tab displays the name of the program and the associated help information.

At the bottom of the help panel, you can access links to the QAD Document Library or to QAD Support, which includes an extensive knowledgebase.

QAD Guide Me



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

Note If this help does not display, it may be disabled. You can enable it using the Guide Me setting found on the Tools|Options menu.

One useful feature of this help is that you do not need to locate your cursor in a field to see the help. In the current example the help for Item Type is being displayed even though the active context field is Item Number.

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 displays only if your role gives you access to this program.

QAD Search

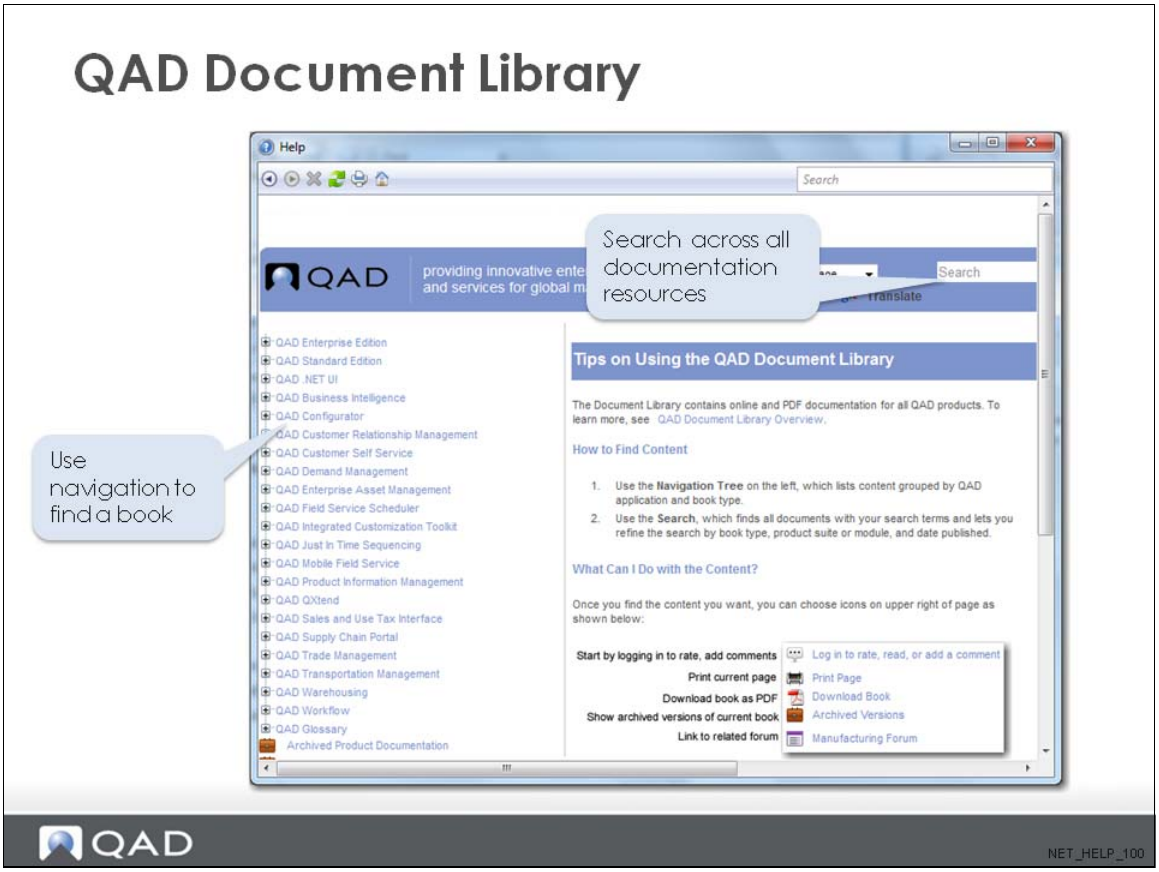
Choose Help | Search to display the QAD Search panel. You can do simple searches for single terms such as *Sales* and phrases such as *Sales Orders*. You can also create more complex terms using operators such as *Sales AND Region*. You can use any of the following operators (entered in upper case):

AND, +, OR, NOT, -

If you are unsure of the exact term you are searching for, use wild cards:

- Use a question mark (?) to replace a single character; for example, *S?les*
- Use an asterisk (*) to replace multiple characters; for example *S**es*
- Use the tilde symbol (~) to perform fuzzy searches, which return results similar to the term you entered. You can specify the similarity to the searched term using a numerical option between 0 and 1 for example, *sales~0.8*. The closer the value to 1, the greater the similarity. The default value is 0.5.
- Use numerals to specify words within a specified distance from each other. For example, if you enter *Sales Region~10*, the panel displays all instances of Sales and Region that appear within 10 words of each other in a document.

QAD Document Library



Access the QAD Document Library by clicking the link at the bottom of the application help or search panel. The library includes user guides, administration guides, installation guides, training guides, and other materials.

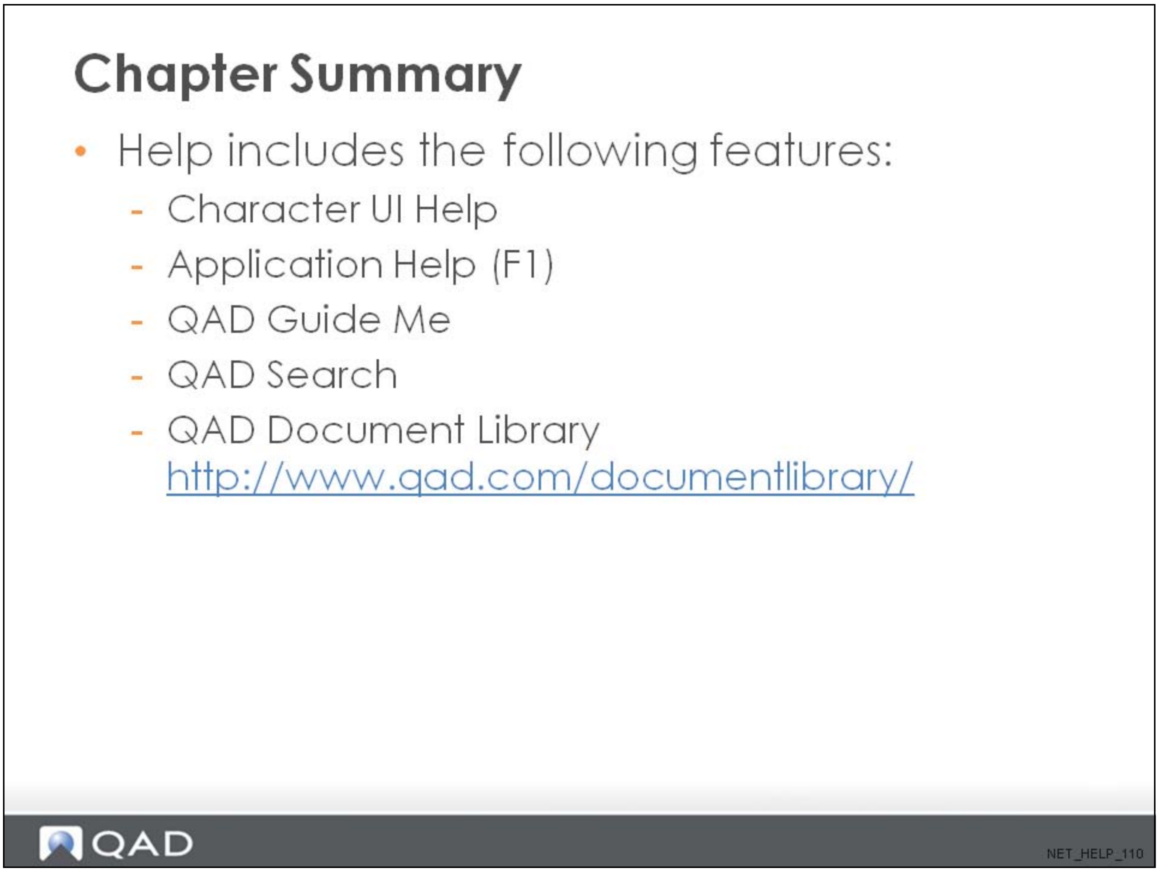
You can also access this library directly from your browser:

http://www.qad.com/documentlibrary

From the Document Library, you can:

- Use the navigation tree on the left, which lists content grouped by QAD application and book type.
- Use the Search, which finds all documents with your search terms and lets you refine the search by book type, product suite or module, and date published.

Summary


Chapter Summary
Help includes the following features:
Character UI Help
Application Help (F1)
QAD Guide Me
QAD Search
QAD Document Library
http://www.qad.com/documentlibrary/
QAD
NET_HELP_110

Exercise and Knowledge Check

1 Launch Purchase Order Maintenance in Terminal mode.

Note Use Properties, Open with to change the mode to Terminal if needed.

Press F2 in the first field of the purchase order. What is displayed? Press F2 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 press F1. What is displayed? Note the differences between non-component based help and component-based help.

5 Find out the answer to the following question by using one of the forms of online assistance:

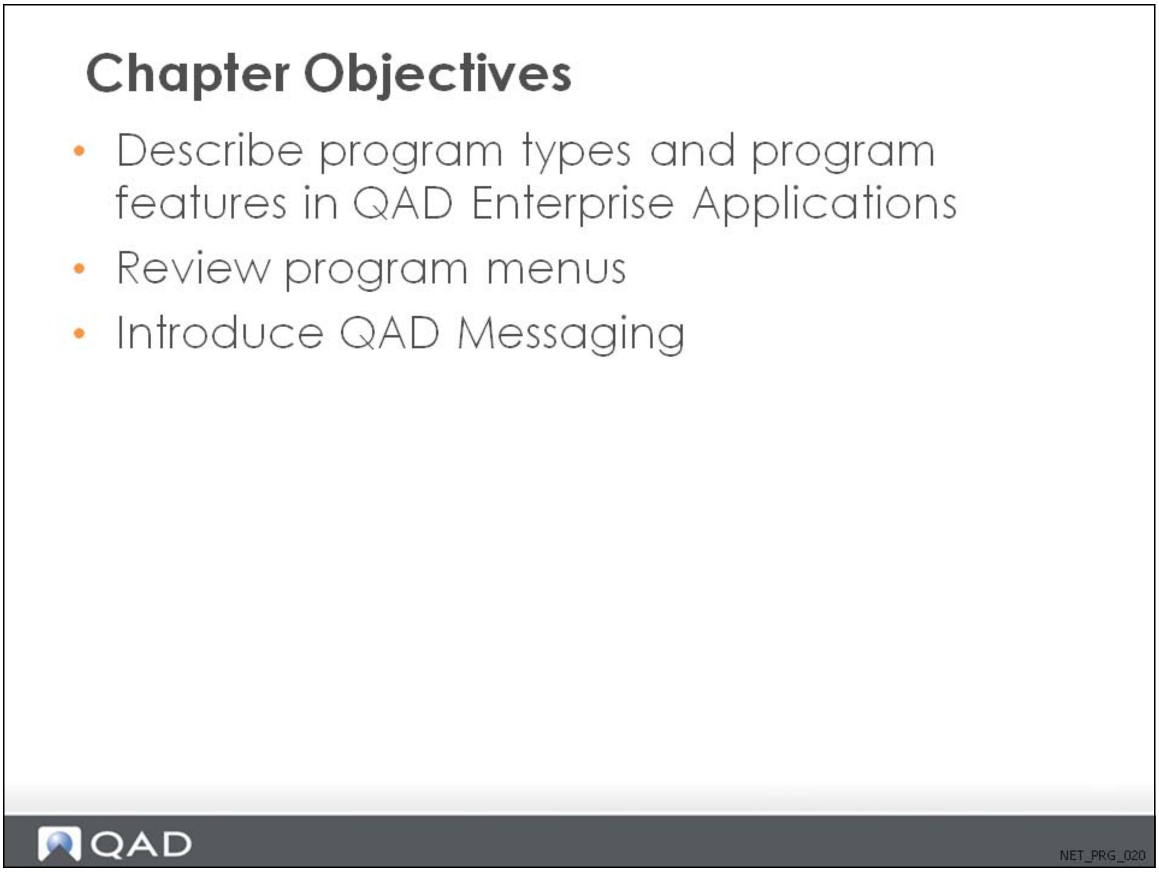
When a sales order is created, a default value displays for Credit Terms. Where is this default value set?

Which form of help did you use to find the answer? Why?

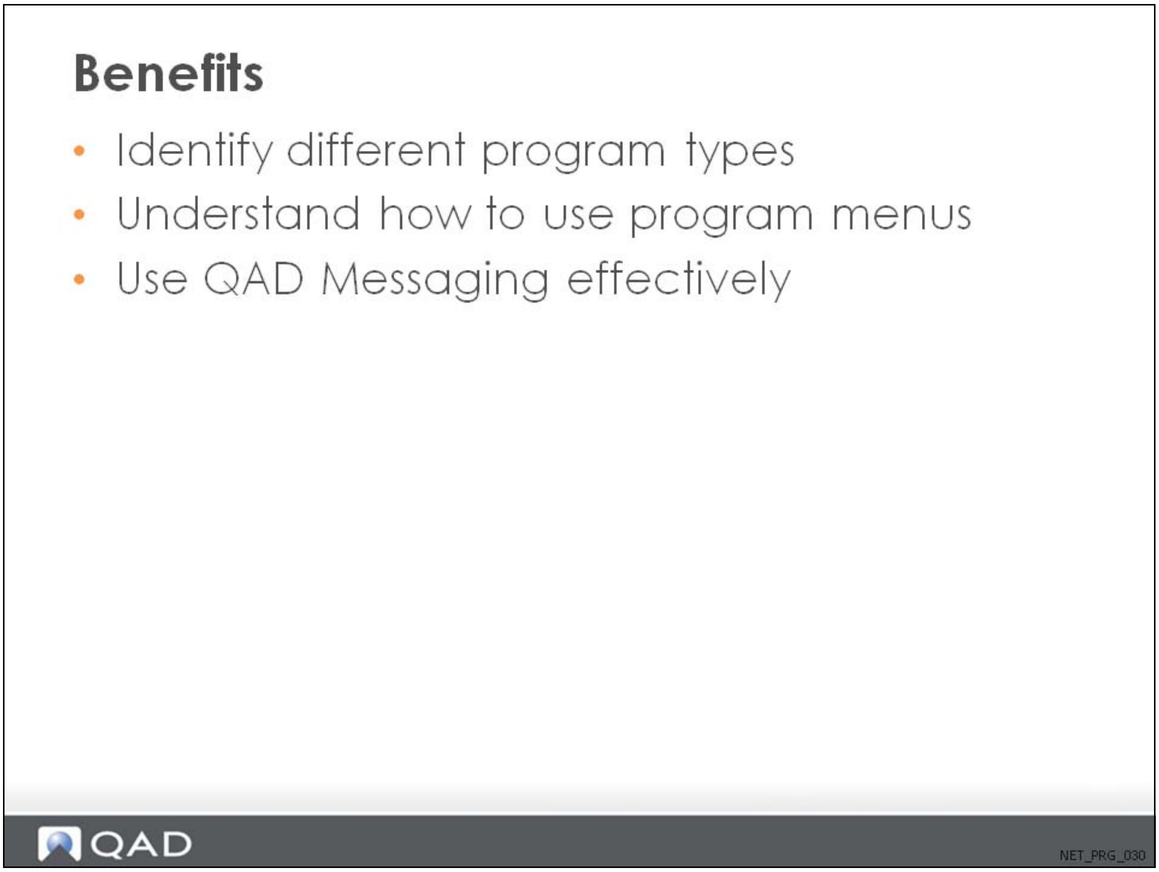
Chapter 4

Programs in the QAD .NET UI

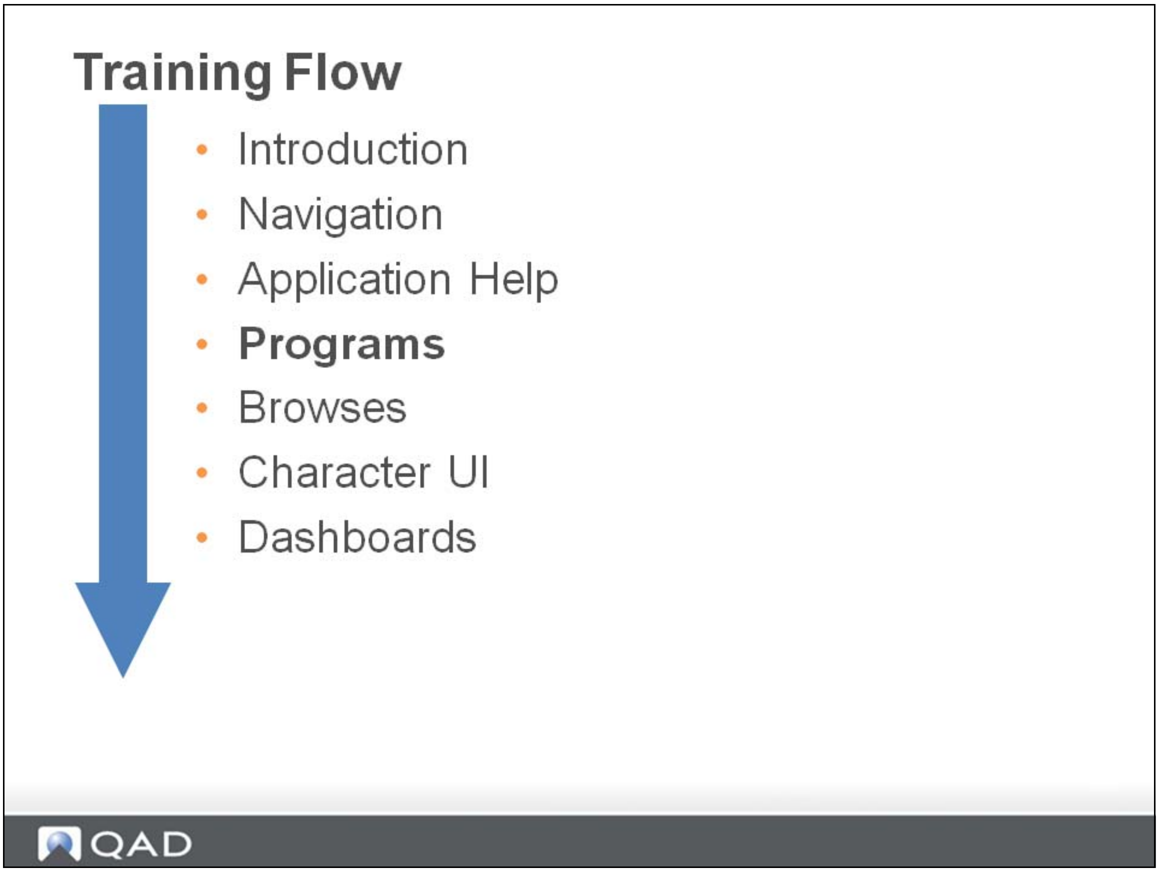
Objective


Chapter Objectives
• Describe program types and program features in QAD Enterprise Applications
• Review program menus
• Introduce QAD Messaging
QAD
NET_PRG_020

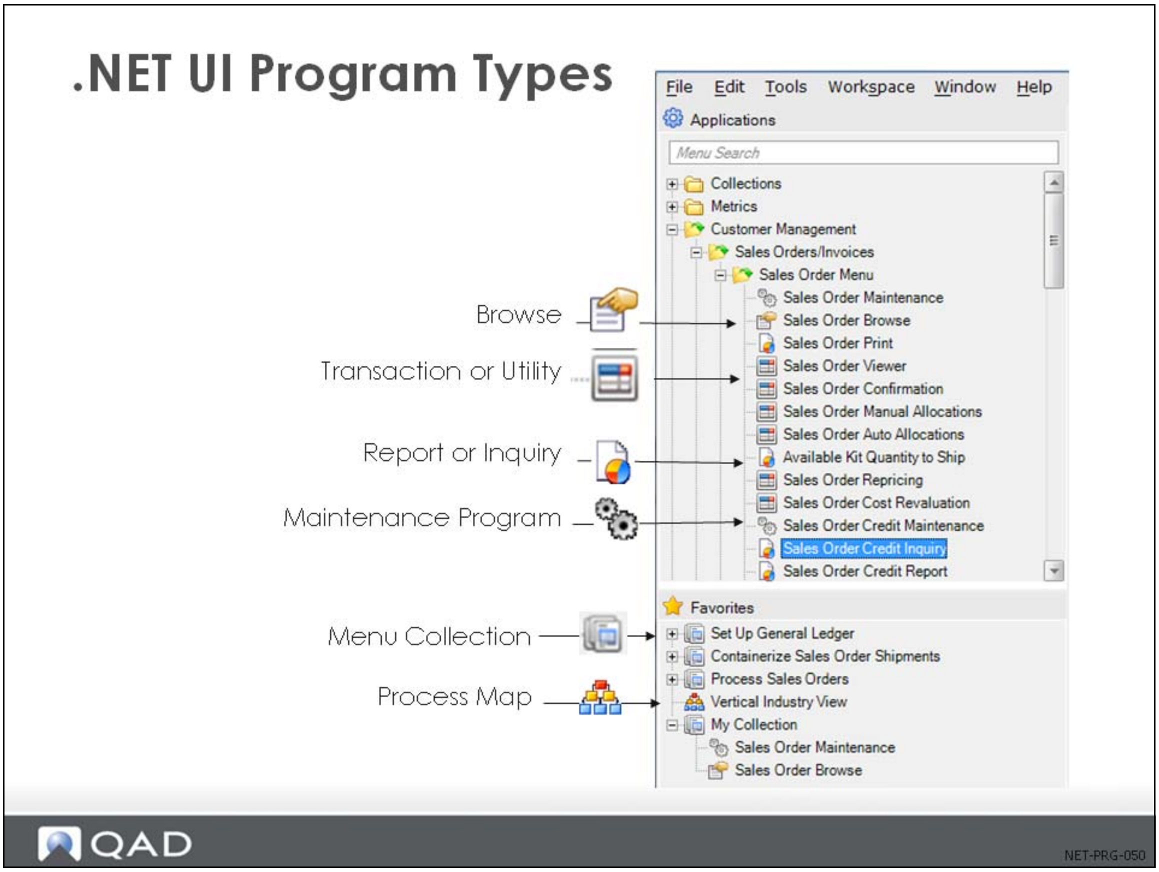
Benefits


Benefits
• Identify different program types
• Understand how to use program menus
• Use QAD Messaging effectively
QAD
NET_PRG_030

Training Flow



.NET UI Program Types



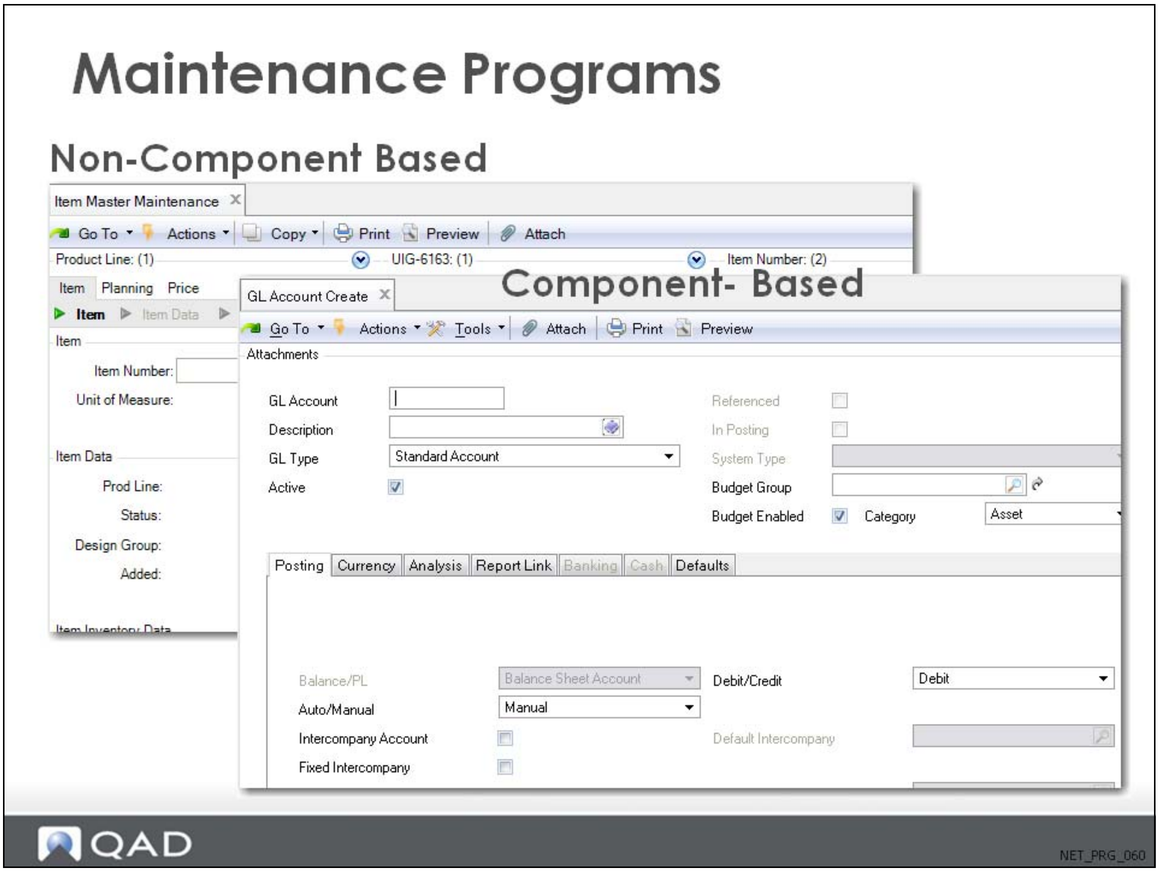
On the menu, a distinct icon indicates the type of program:

- Maintenance programs
- Transactions and utilities
- Reports and inquiries
- Browses and browse collections
- Menu collections
- Process maps

Each type of program maintains a specific kind of data within the database.

The next slides illustrate the types of programs that you will encounter as you use the product during this course.

Maintenance Programs

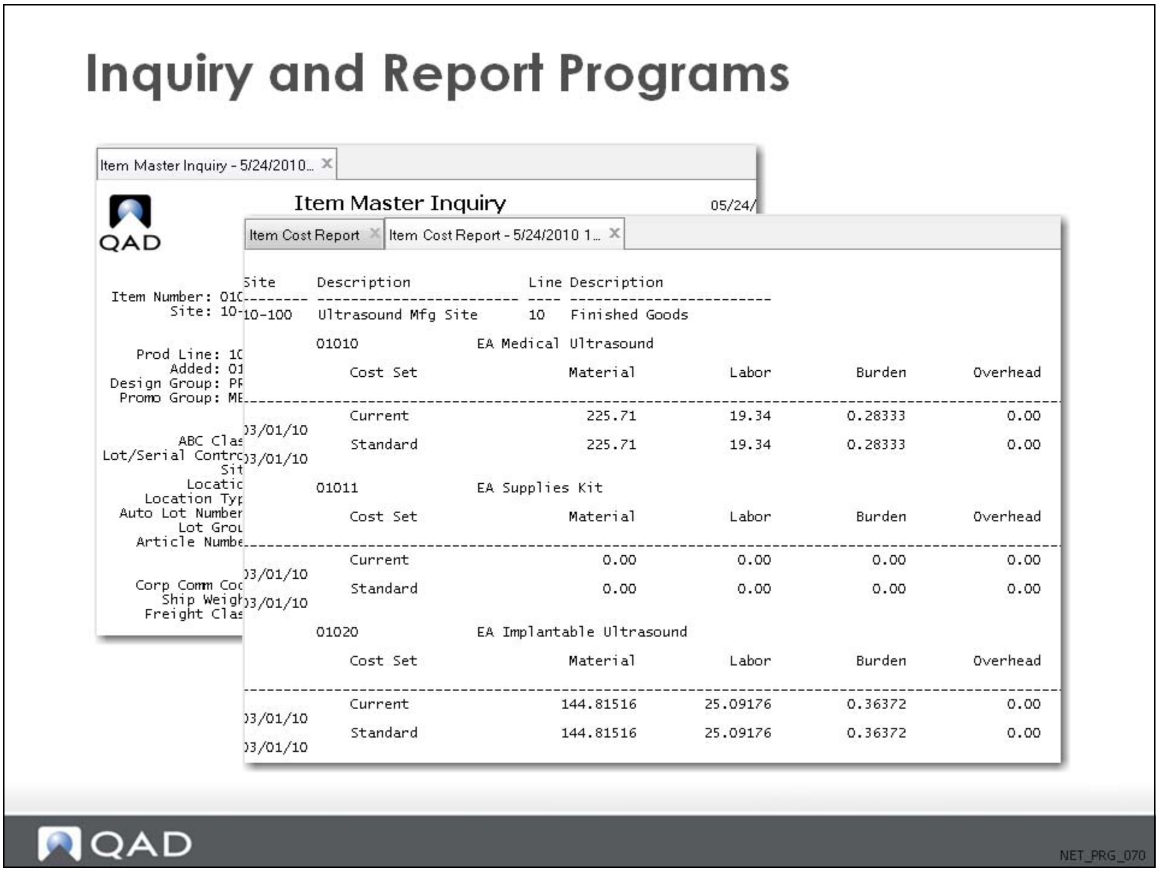


Maintenance programs create and maintain basic codes such as customers, inventory items, GL accounts, currencies, and other data. They are also used to record data that initializes business activity in a module such as sales orders and purchase orders. Most maintenance programs update static data, which is changed infrequently.

Entering data in a maintenance program creates a record in one or more tables controlled by the maintenance program. For example, item records are stored in the Item Master table controlled by Item Master Maintenance.

With non-component maintenance programs, all changes to the record are made in the same maintenance program. In component-based maintenance programs, changes are made in separate Create, Modify, or Delete functions.

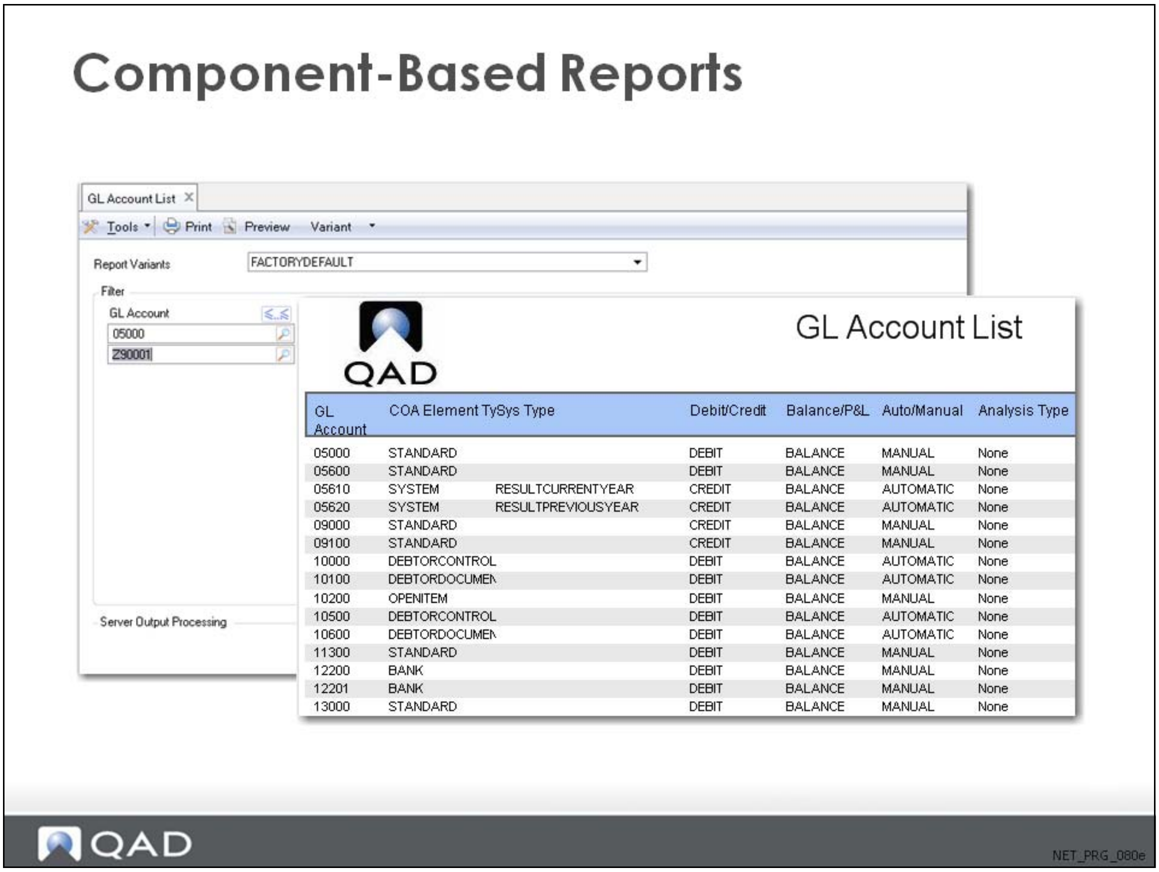
Inquiry and Report Programs



Inquiries and reports retrieve and display database records.

- Inquiries are primarily used to answer specific questions and are typically viewed online, although they can be printed
- 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. Reports are often sent to a printer or file. Other output options such as e-mail are available.

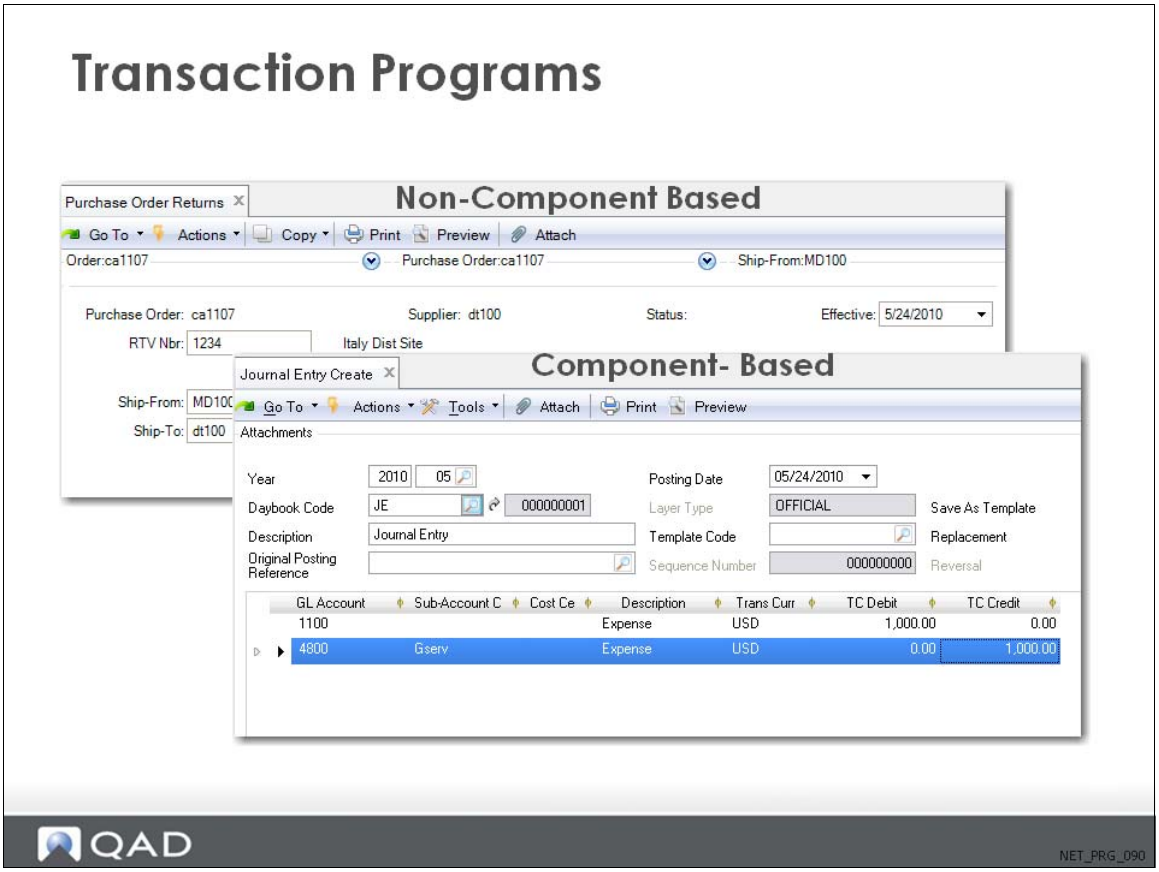
Component-Based Reports



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.

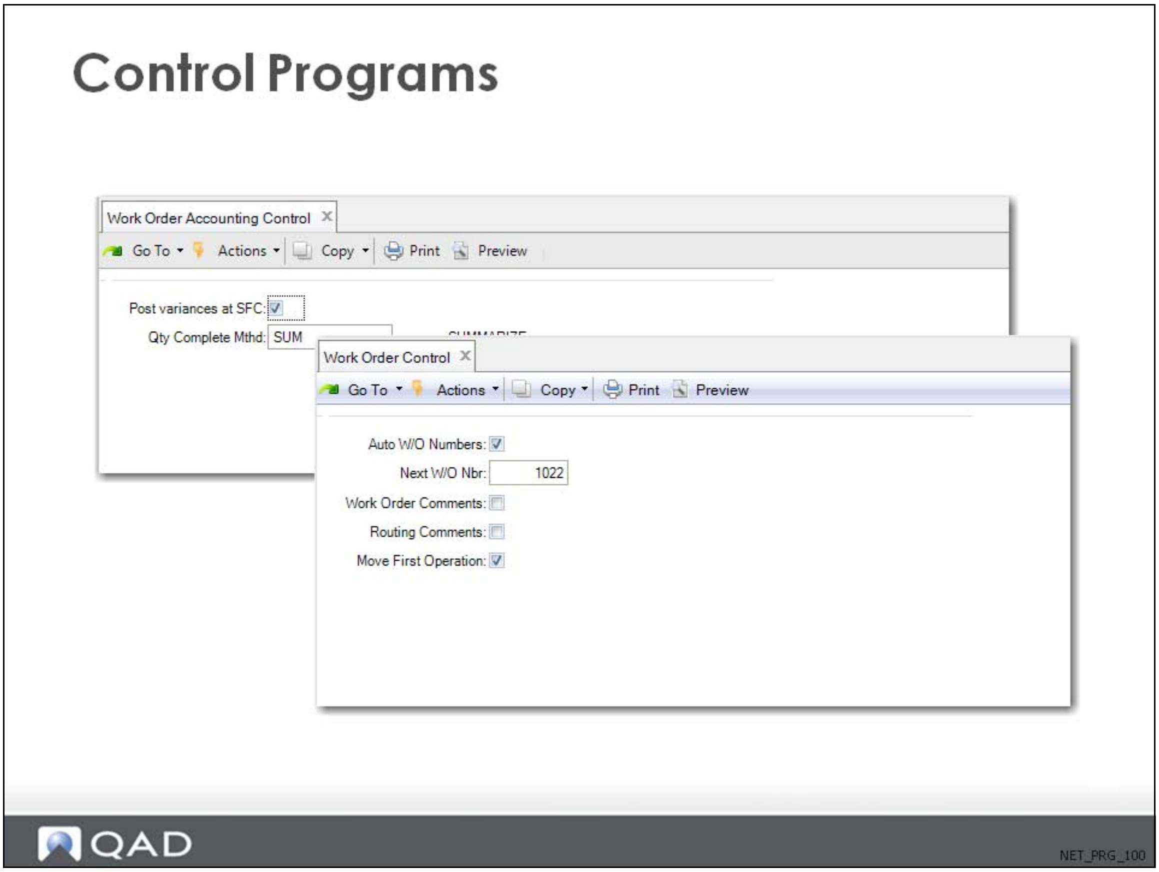
Transaction Programs



Transactions express the core business activities of a company. They control and record activities related to business documents such as sales orders and invoices. Example of transaction are shipping a sales order or receipt of a shipment for a purchase order. Enterprise Financials transaction programs include Customer and Supplier Invoice Create 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



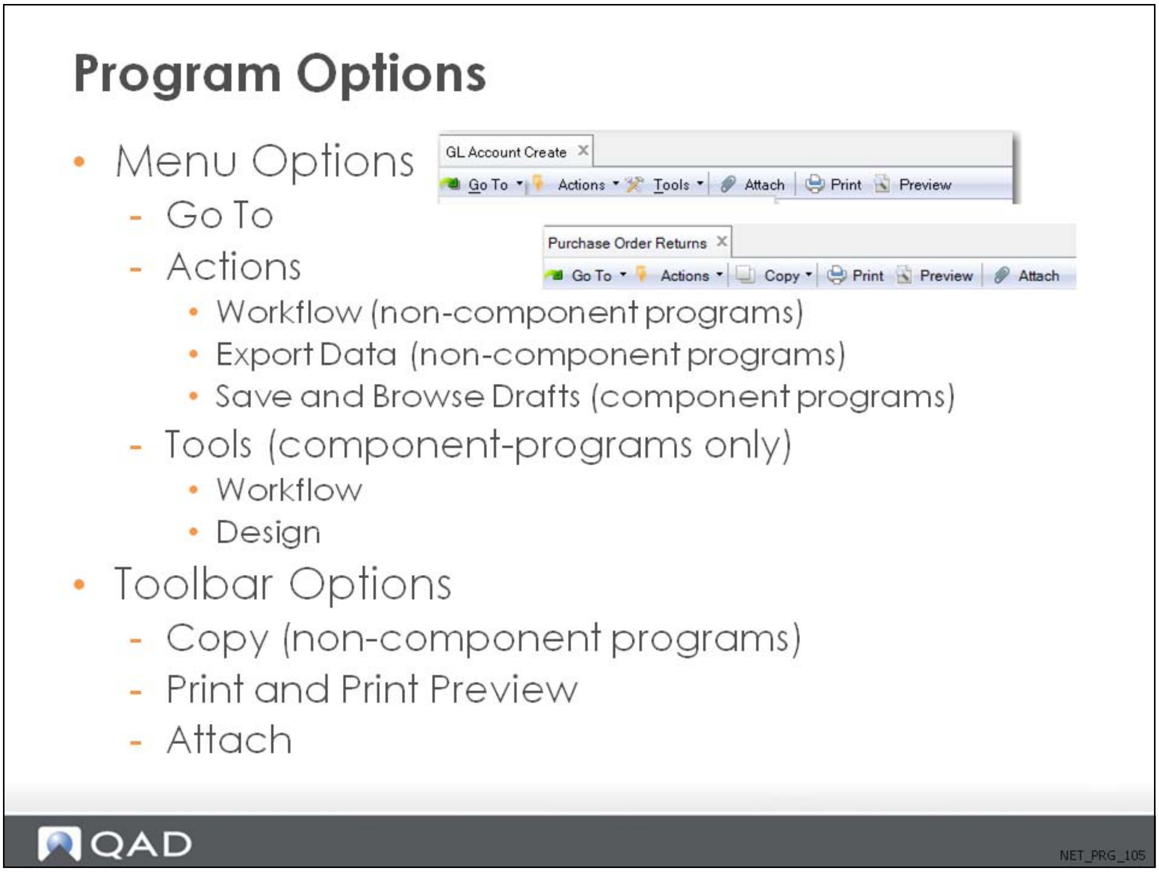
When you implement a module, you enter data that the system uses later to control the interactions with users and with the database. This data is stored in control tables.

Control tables enable you to adapt QAD Enterprise Applications 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 settings enable you to establish a preference.

This slide shows two control programs with settings that affect work order processing. To support the enhanced segregation of duties features of QAD Enterprise Edition, financial control settings are updated separately from operational controls. For example, Work Order Control (16.24) under the Work Order menu in Manufacturing has only the operational control settings for work orders. All of the financial control settings for work orders are in Work Order Accounting Control (36.9.11) under the Operational Acct Controls menu in System Administration.

Note This is unlike QAD Standard Edition, where all control settings for a functional area are updated in one program.

Program Options

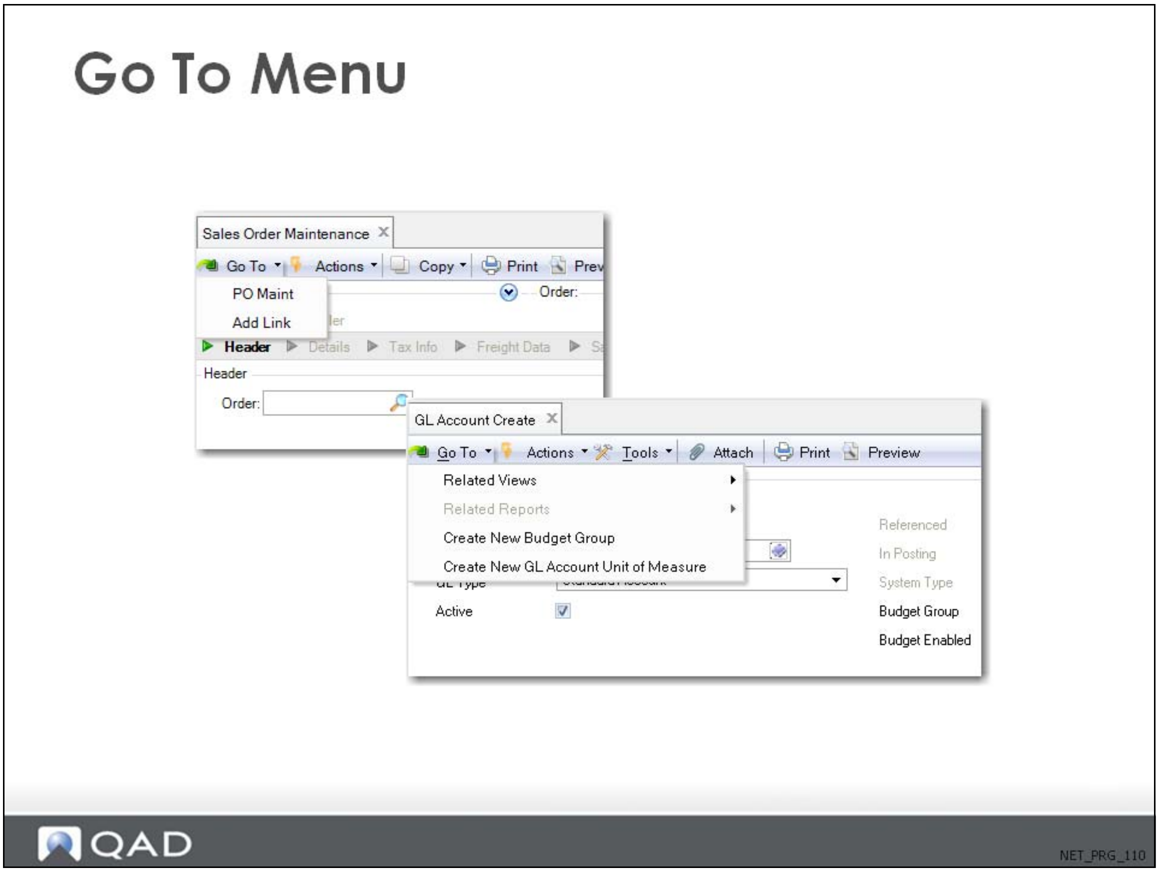


The menu options for browses are described in Chapter 5, “Browses in the QAD .NET UI,” on page 81. This section describes key menu options on maintenance and transaction programs. These options differ somewhat between component-based and non-component based programs. Component-based programs have an Actions menu and a Tools menu; non-component based programs have only the Actions menu.

This table summarizes differences in the program menus.

Non-Component Based	**Component Based**
Go To links are added manually using User Tool Maintenance (36.4.8.5 in EE, 36.20.4 in SE).	Go To links are supplied automatically by the system based on the structure of the program. These include related views and other options based on the field currently in focus. For example, when GL Account is in focus, you can go directly to creating a new budget group.
No Tools menu; Workflow option is on Actions menu. Design customizations is accessed directly through menu-level programs and right-click menu option.	Tools menu includes Workflow and Design Mode. Users with access can modify the user interface appearance of the program.
Simple workflow with link to program.	More complex, structured, and predefined workflows.
Actions menu is mainly simple record-level actions. It includes an Export action that creates an XML file.	Actions menu is more complex and changes based on specific program context. You can save and open draft versions of a document.

Go To Menu



Non-Component Based Programs

The Go To 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 (36.4.8.5 in EE, 36.20.4 in SE).

Component-Based Programs

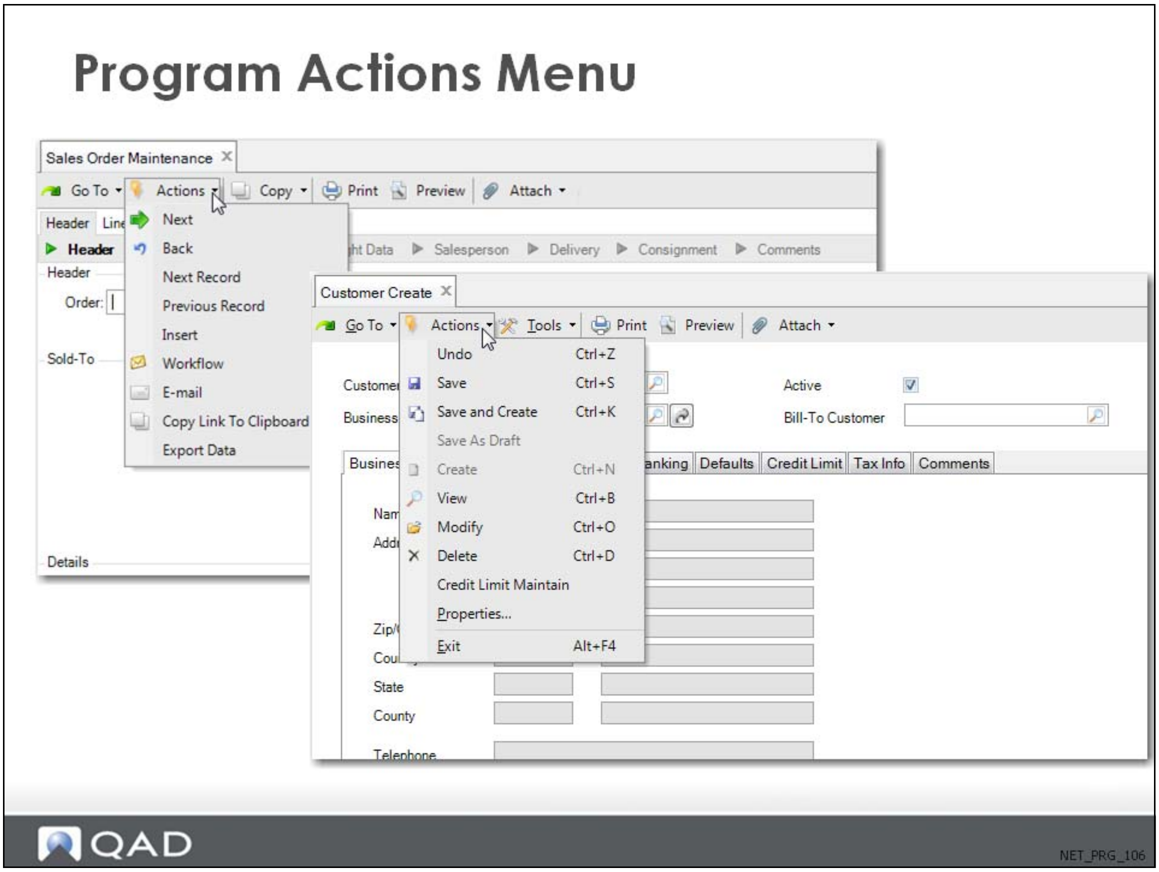
The Go To option for component-based programs displays Go To options and Related Views. Related Views are commonly used views and reports that apply to the record you are currently working with.

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 Go To to see the Create New Budget Group or Create New GL Account Unit of Measure.

Program Actions Menu



The Actions menu lists active commands that apply to your current program context.

Non-Component Programs

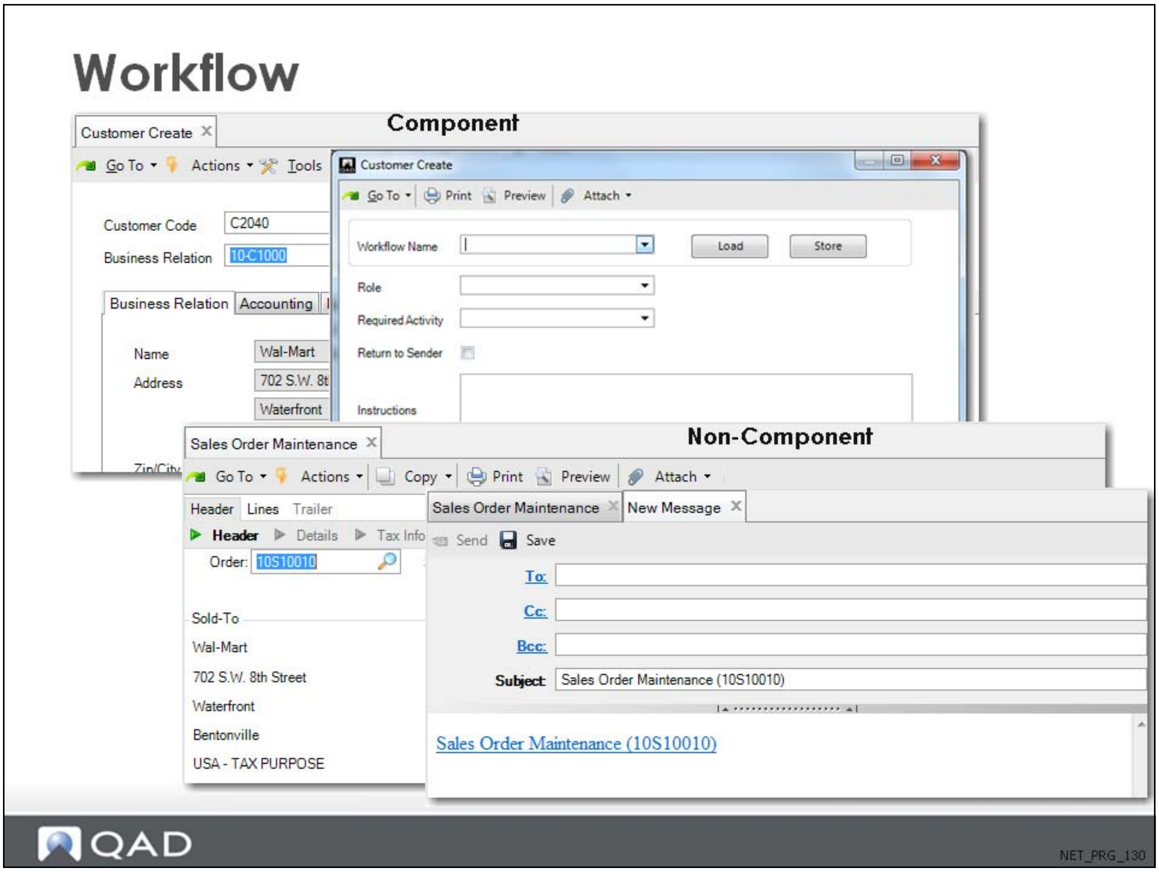
For non-component based programs, Actions options include navigation commands such as Next, Back, Next Record, and Previous Record. These commands let you navigate to the next or previous frame, or display the next or previous record for the current field. You can also use the up and down arrows on your keyboard to display next and previous records in key fields or when the field has been defined to support next/previous processing.

For non-component programs, you can also choose workflow to send a link to the current program to a system user (see page 72), e-mail to send a link to an external user, or Export Data, to create an XML test file (see page 73).

Component Programs

The Actions menu functions in a similar way for component-based screens, with some additional features. General activities include Undo, Save, Save and Create, Save as Draft (see page 74), and Properties. Record-specific activities in the example of the Customer Create program include Create, View, Modify, Delete, and Maintain Credit Limit.

Workflow



Workflow is available for both types of programs and is visible as an Actions menu option for non-component based programs and as a Tools menu option for component-based programs.

Non-Component Based Programs

When you click Workflow in a non-component based program, the system creates a message for another system user, with the current screen as an attached link. This message is then posted to the user’s Inbox using the .NET UI’s internal messaging system.

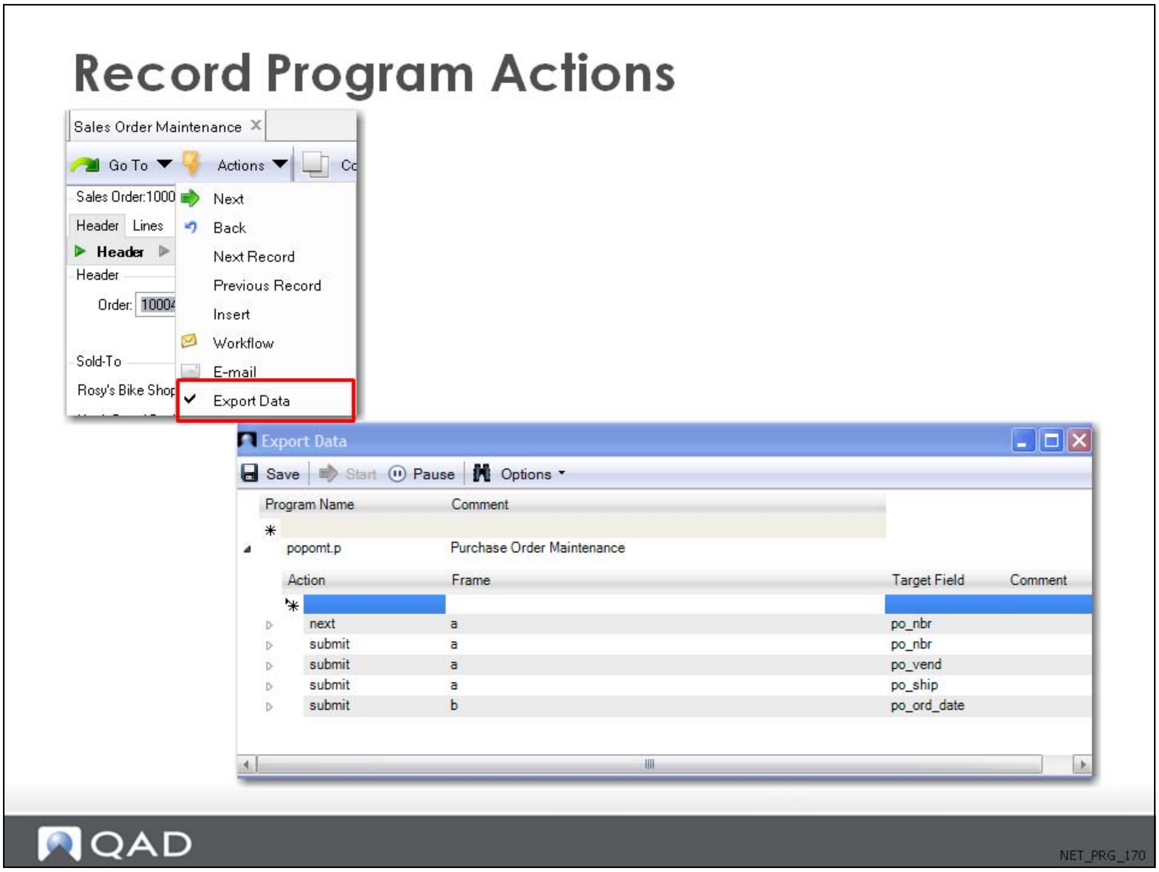
You can also send an e-mail link to non-system users with your PC’s default e-mail system.

Component-Based Programs

Workflow lets you forward final or draft work items to one or more individuals—identified by a role—in the organization for completion or validation. You activate workflow using System and User Settings.

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.

Record Program Actions



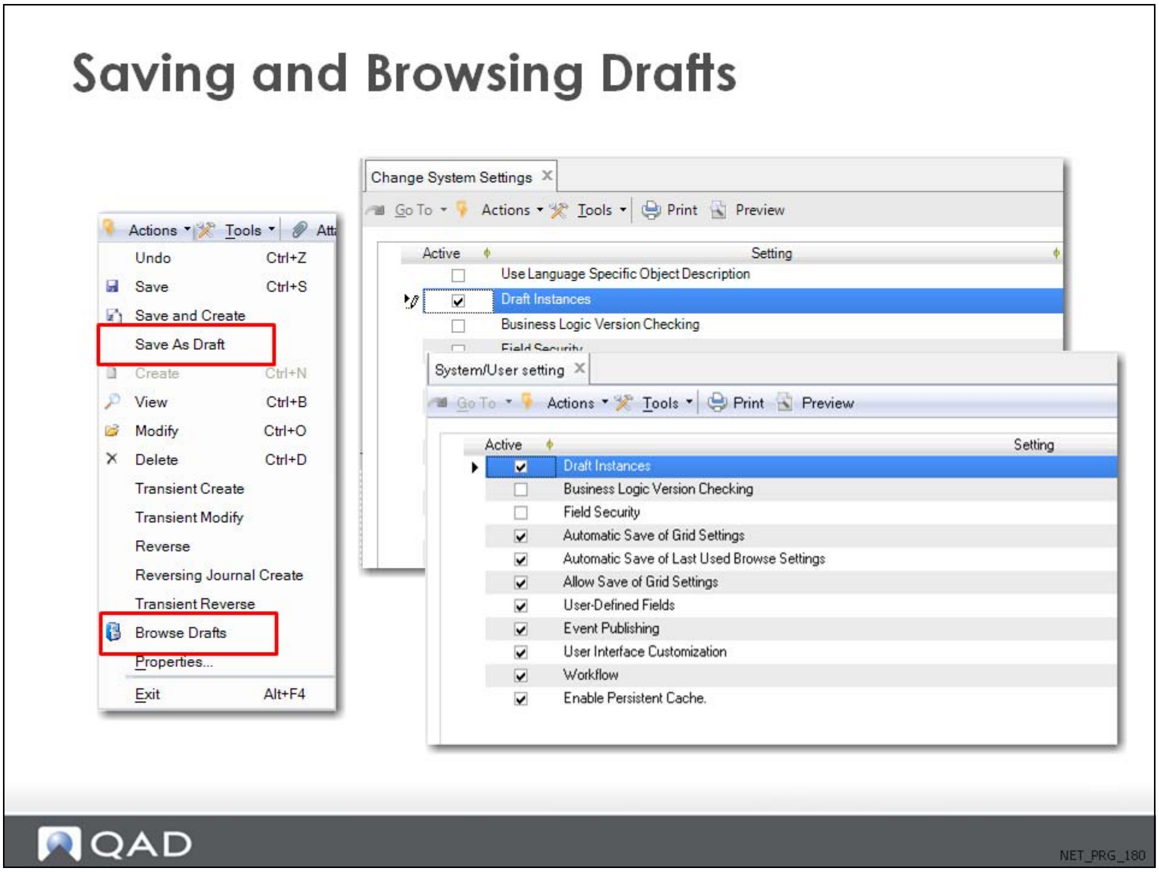
The Export Data function is a test utility in the QAD .NET UI and is available in the Actions menu for all non-component based programs. This function lets you record your actions as you complete an application process and save the recorded actions to an .XML or .XLS file that you store locally. You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

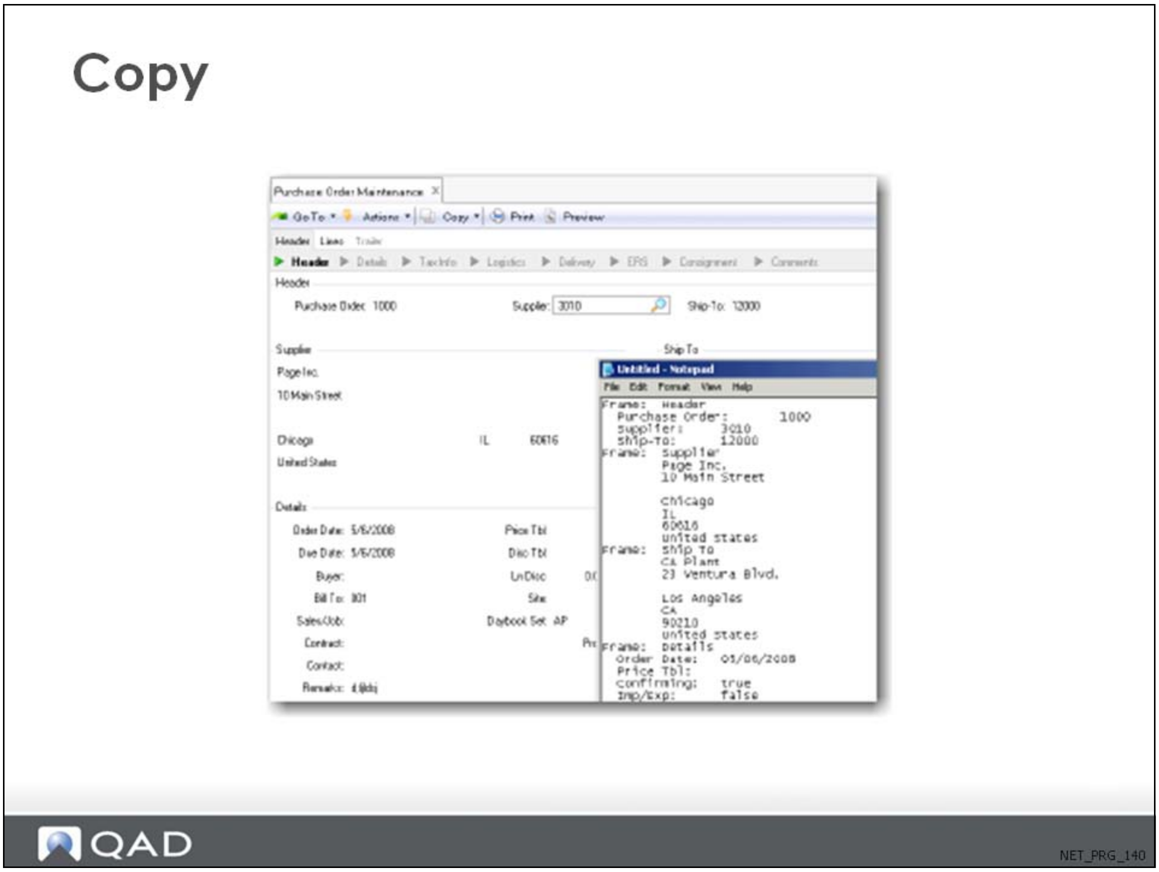


The Save as Draft and Browse Drafts options are available for component-based programs only and must be enabled by an administrator in Change System Settings (36.24.5.1). When Save as Draft is enabled, you can save selected records without completing all the validations required to ensure that the record 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.

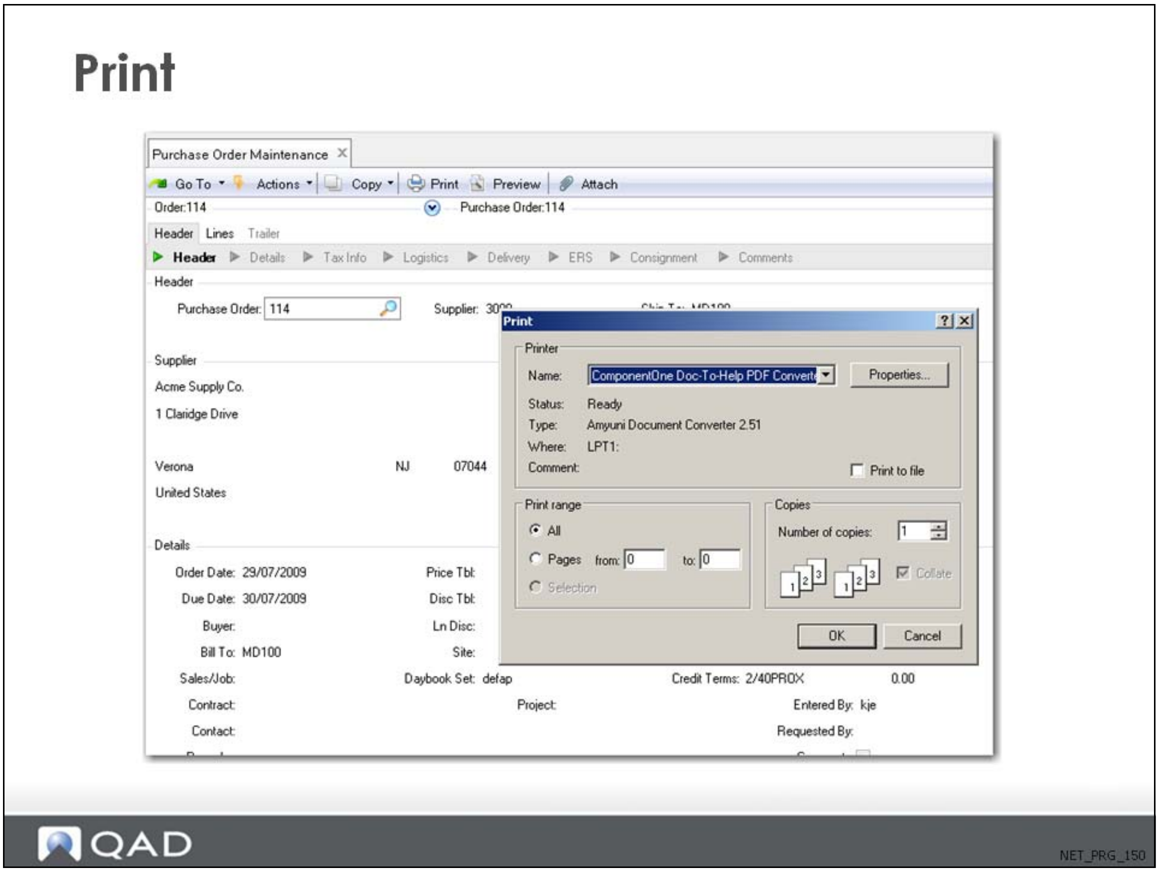
- Banking Entry
- Business Relation
- Petty Cash
- Customer
- Customer Invoice
- Finance Charge
- Journal Entry
- Supplier Invoice
- Supplier

Copy



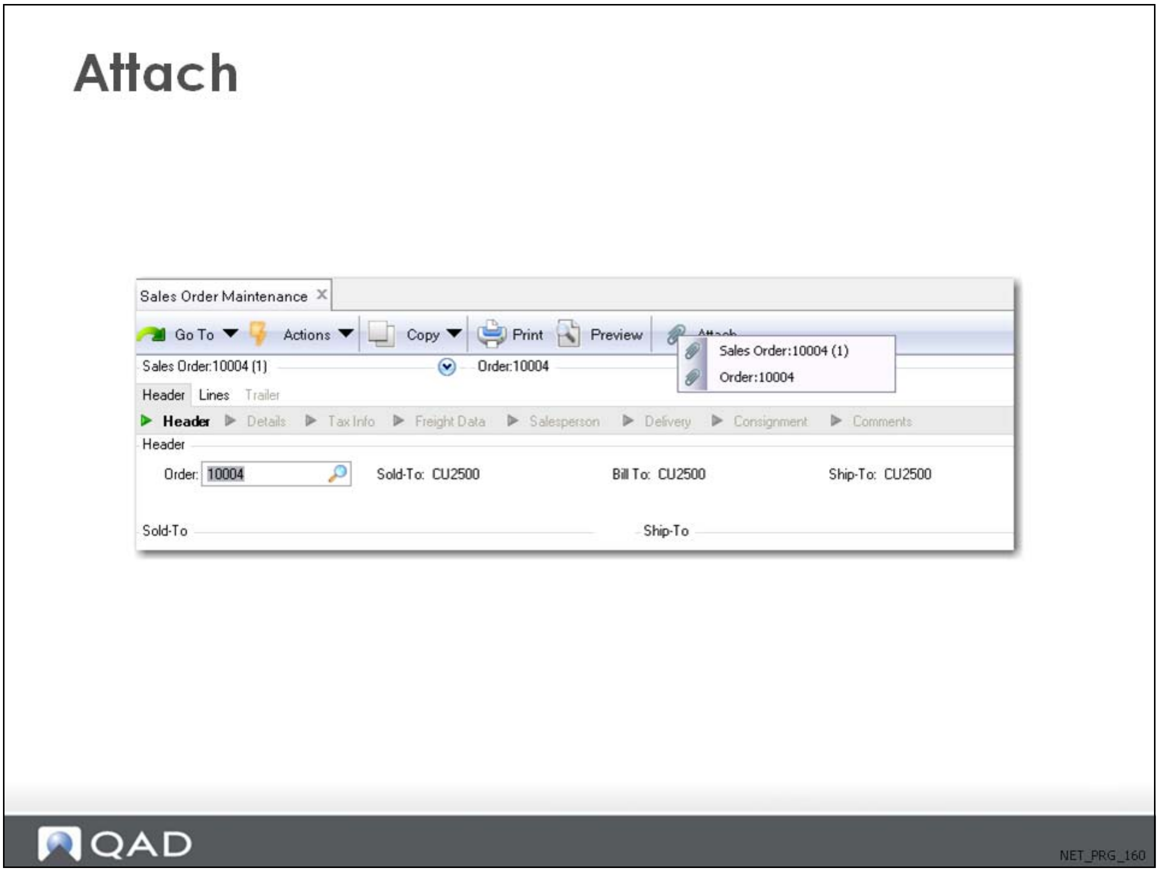
The Copy menu is only available for non-component based programs and lets you to copy the text of the current screen to the clipboard, or copy an image of the current screen to the clipboard.

Print



The Print and Print Preview options are common to both types of programs. Print prints the current screen to the default printer and Preview generates a preview of what will print for the current screen.

Attach



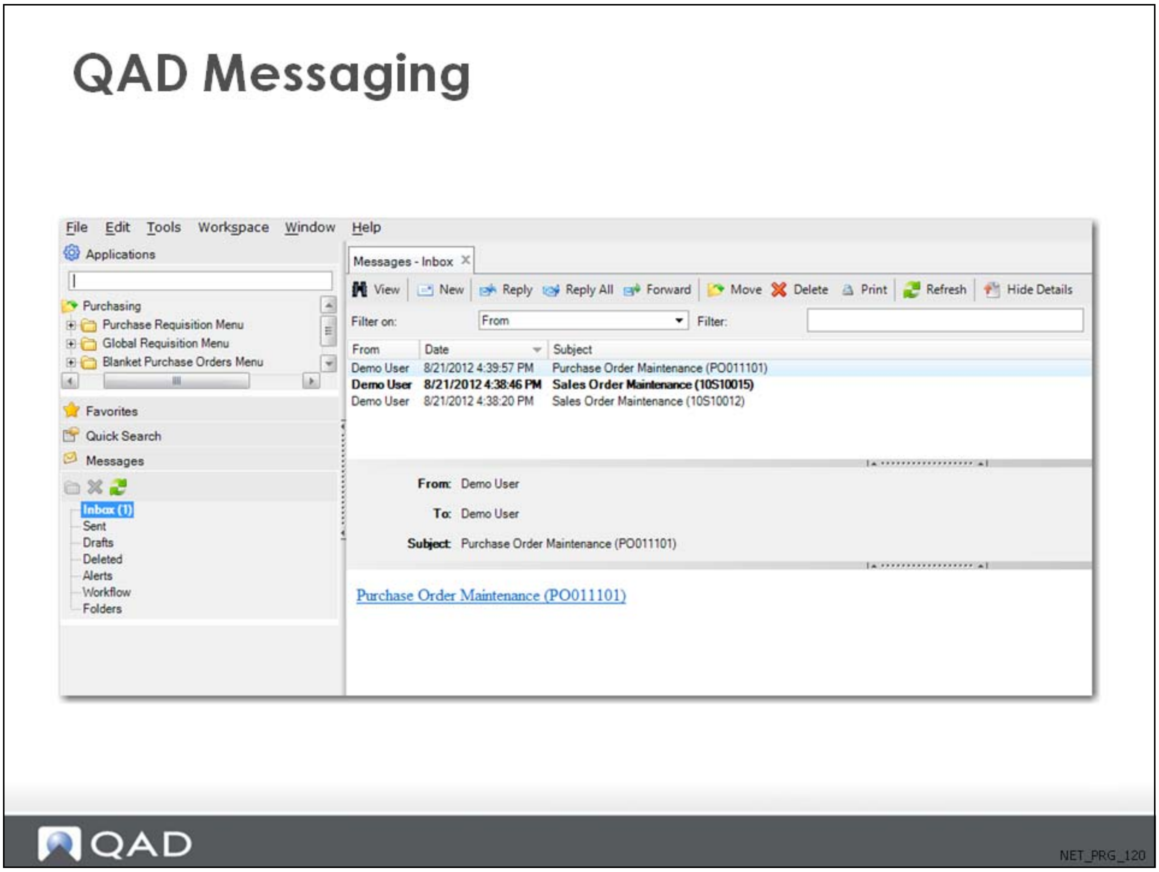
Attach lets you attach any type of document—such as a Microsoft Word file, graphics file, or PDF—to a record within the application. This integration ensures that all required documentation is immediately accessible when needed. You can attach and view any type of file if the corresponding viewing software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

A copy of the attached document is stored in the system database, which means that the document is always available and consistent with the application data.

Example Use the Attach option to associate a summary of a customer's business activities with a customer record or attach a PDF of an invoice to a supplier invoice record.

To create a new attachment, click the Attach icon in the toolbar. A standard Windows Open dialog displays so you can select the document you want to attach. The number of attached documents displays in the menu. To see the attachments, click the chevron in the top bar on the screen. Each linked document displays in this view and can be removed if necessary.

QAD Messaging

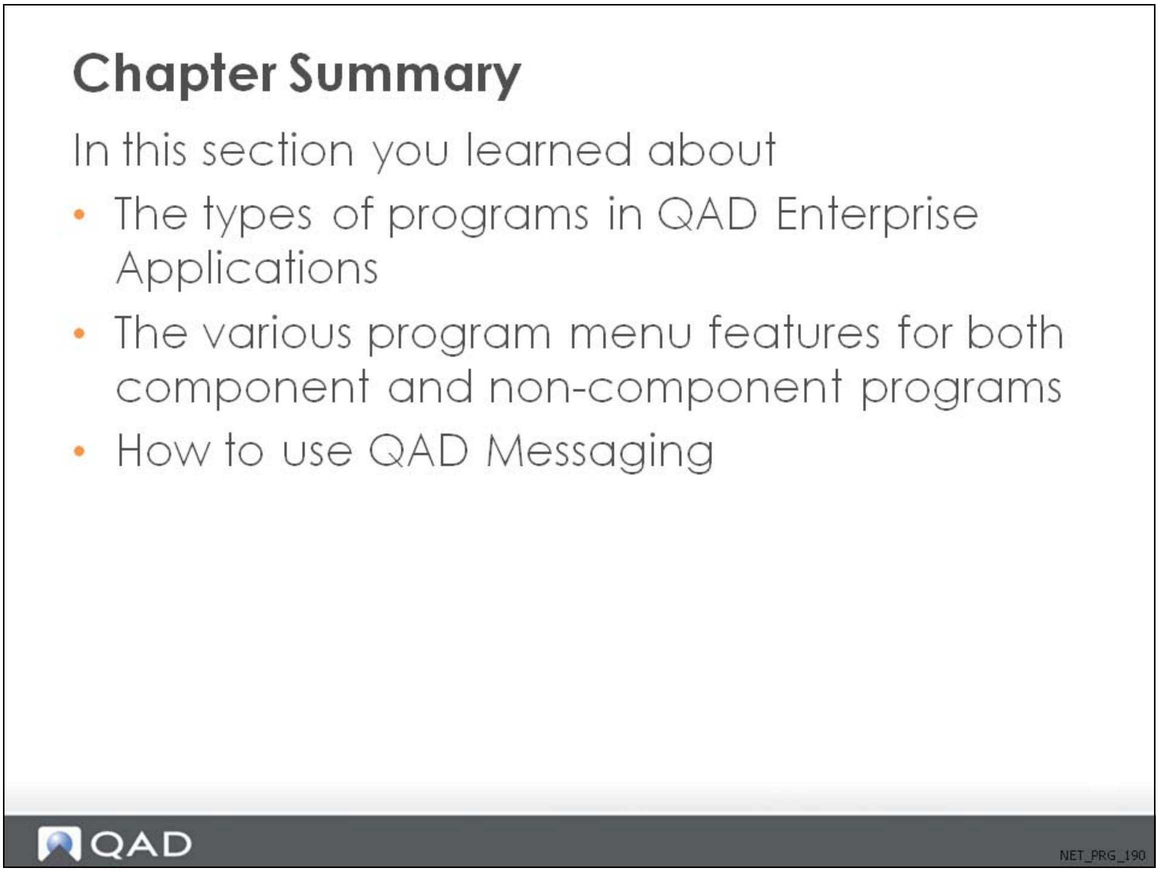


QAD Messaging is a messaging and internal e-mail system within QAD applications that lets you send messages to other users of the system. When using programs, browses, inquiries, and process maps, the QAD Messaging sidebar is permanently available on the left side of the application area for sending and receiving messages. You can also use Messaging to process program or browse workflow messages, which include links to programs or browses.

To send a message:

1. Click the New icon.
2. In the To field, enter the user IDs or names of the users to whom you want to send the message.
3. In the Subject field, enter text indicating the subject of the message.
4. In the content area, enter or paste message content.
5. Click Send to send the message (or click Cancel to cancel it).

Summary



Exercise and Knowledge Check

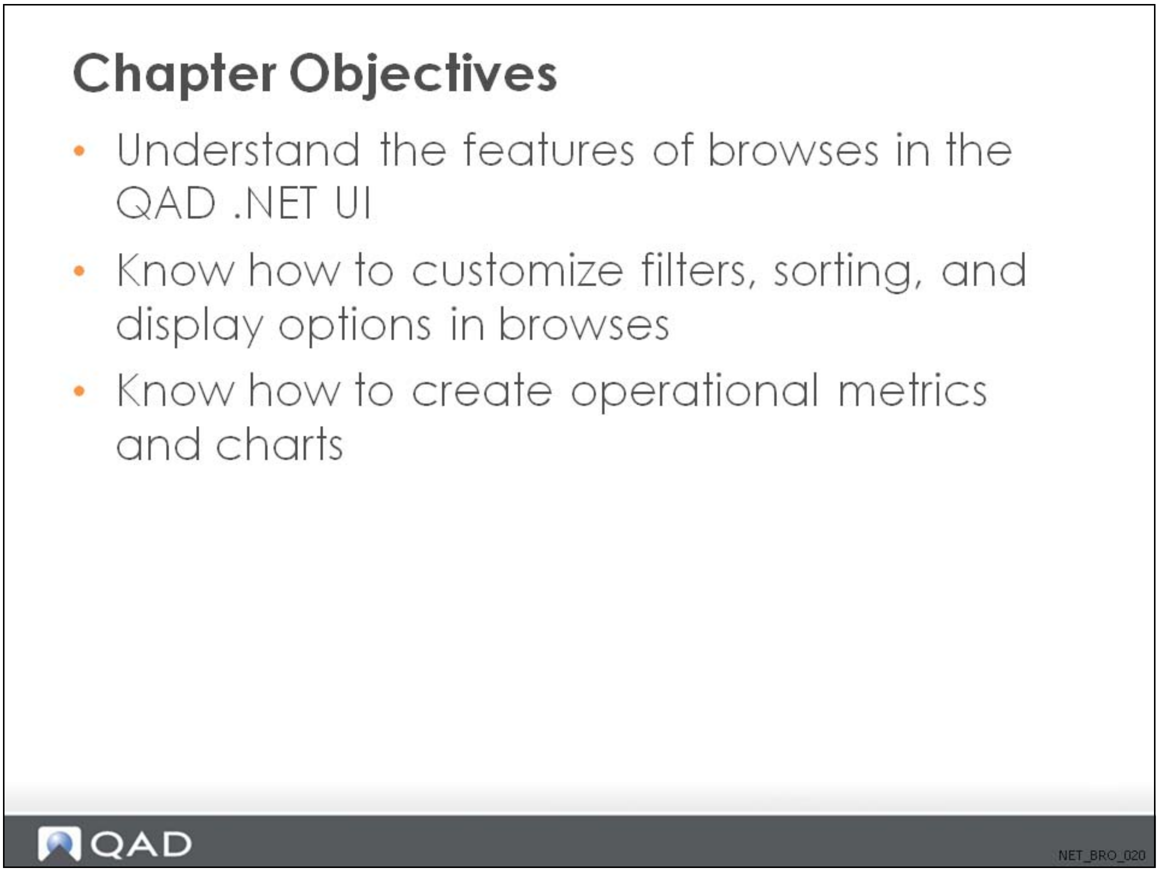
1. Sales Order Control is an example of what type of program?
2. In Sales Order Maintenance, select the Go To function. Add a link to the Sales Order Browse program `sobr009.p`.

   Open up a sales order and Go To the Sales Order Browse.
3. Select GL Account List, run the report, and send the output to a printer.
4. Display an existing sales order in Sales Order Maintenance by selecting it from the lookup on the Order field. Send the sales order to your user ID by using the workflow.
   - a. Click Actions and select Workflow.
   - b. Enter your class login.
   - c. You should see the message appear in the Messages area of the UI. Open the message and see what information is included.
5. Create a document in Microsoft Word. Save it to the c:\ drive and attach the document to a purchase order.

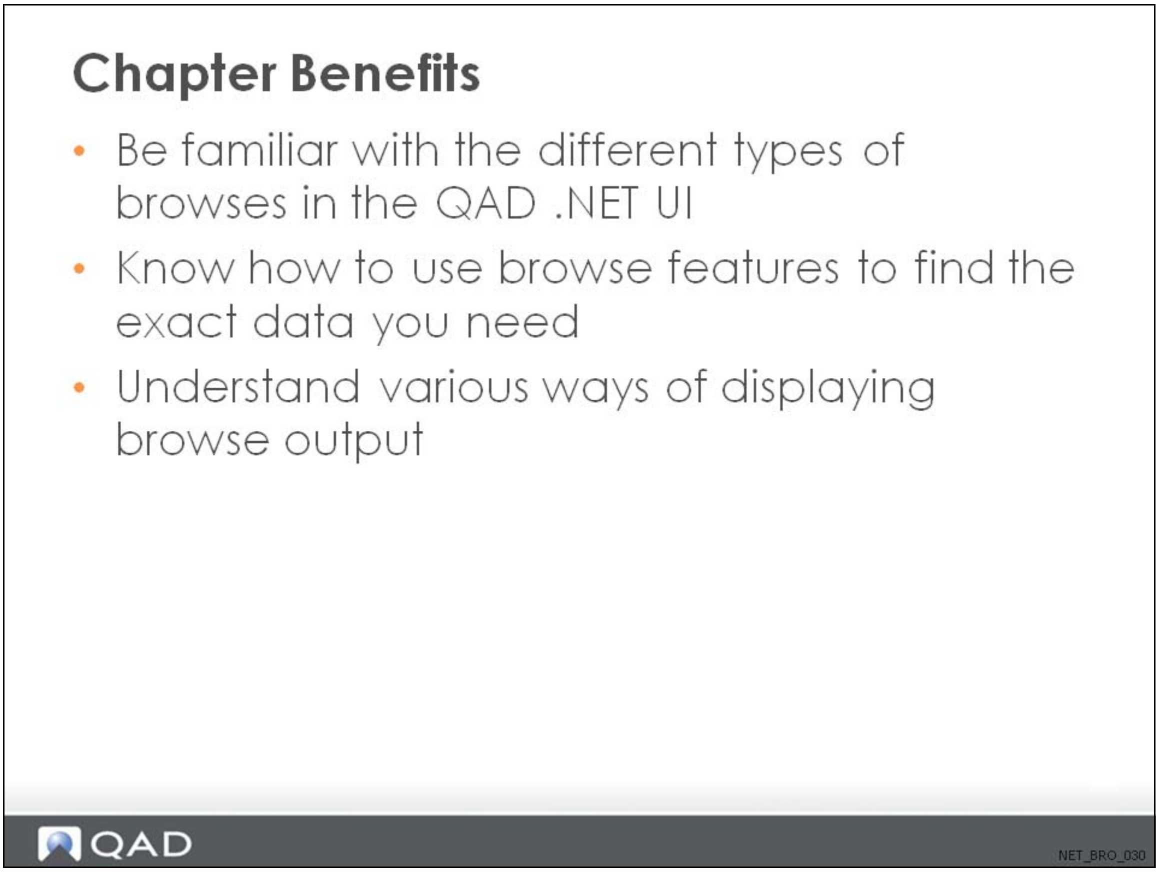
Chapter 5

Browses in the QAD .NET UI

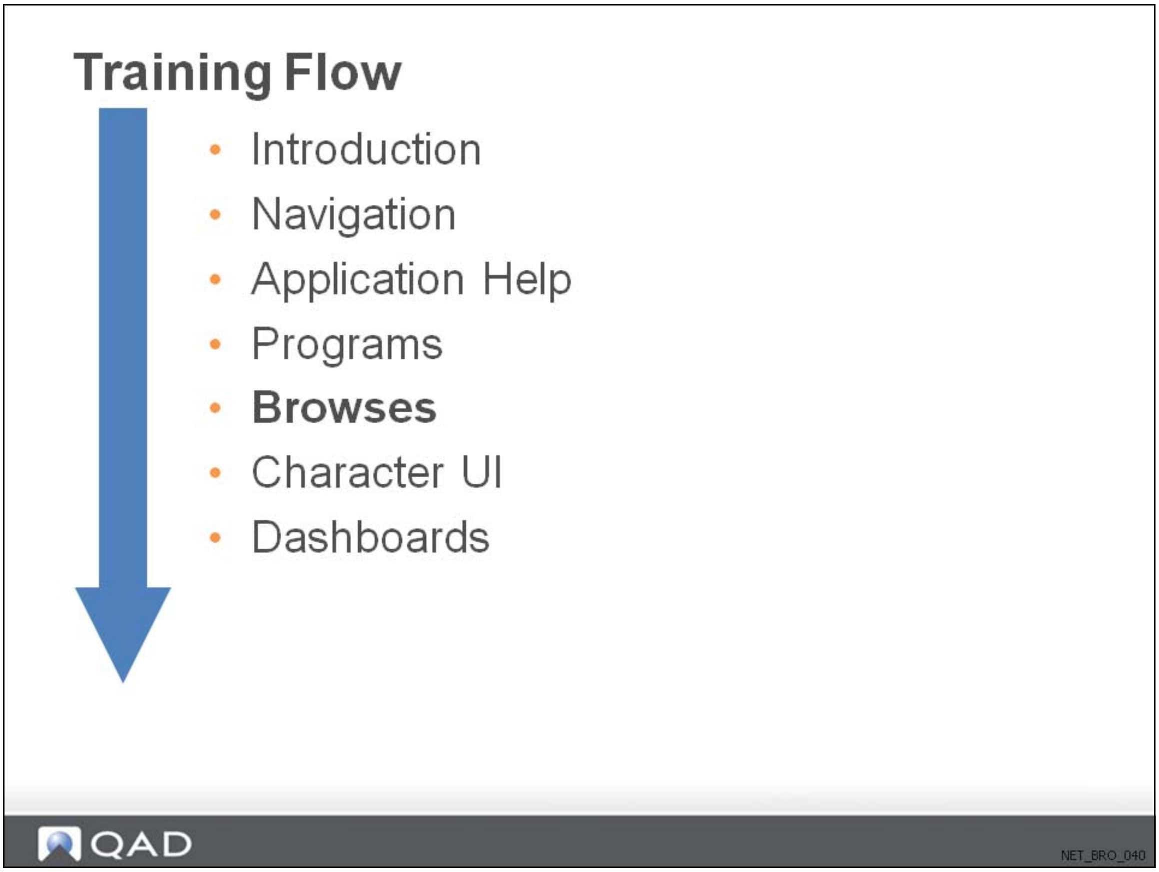
Chapter Objectives



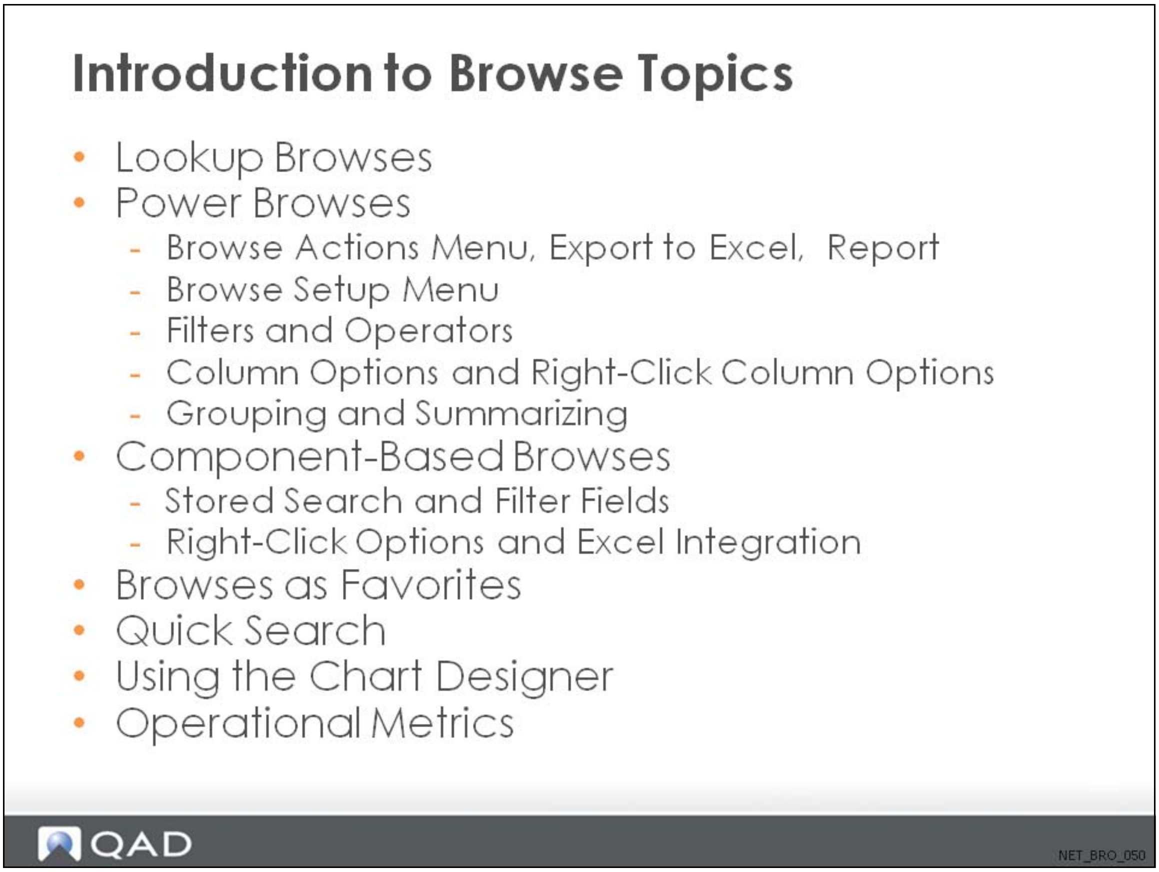
Chapter Benefits



Training Flow



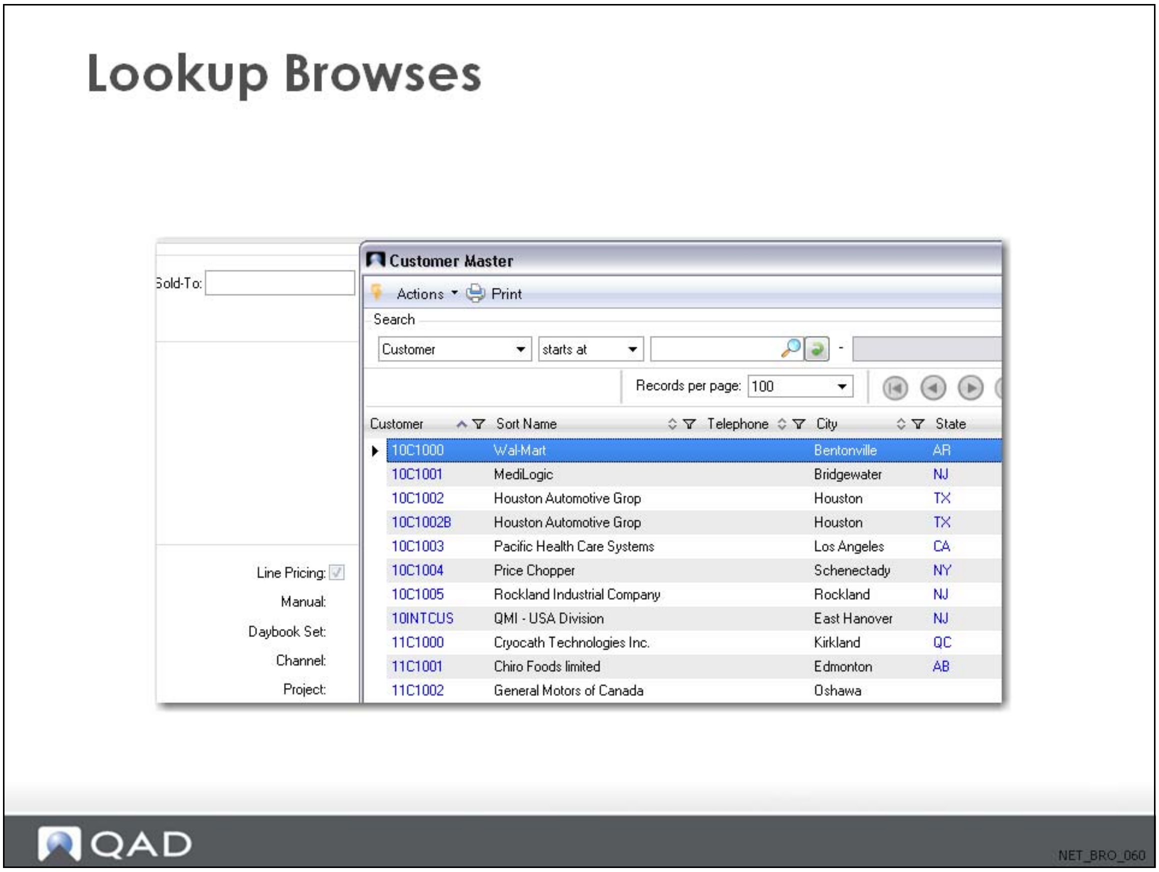
Introduction to Browse Topics



This chapter covers the following topics:

- Lookup Browses
- Power Browses
  - Browse Action Menu, Export to Excel, and Report
  - Browse Setup Menu
  - Filters and Operators
  - Column Options and Right-Click Column Options
  - Grouping and Summarizing
- Component-Based Browses
  - Stored Search and Filter Fields
  - Right-Click Options and Excel Integration
- Browses as Favorites
- Quick Search
- Using the Chart Designer
- Operational Metrics

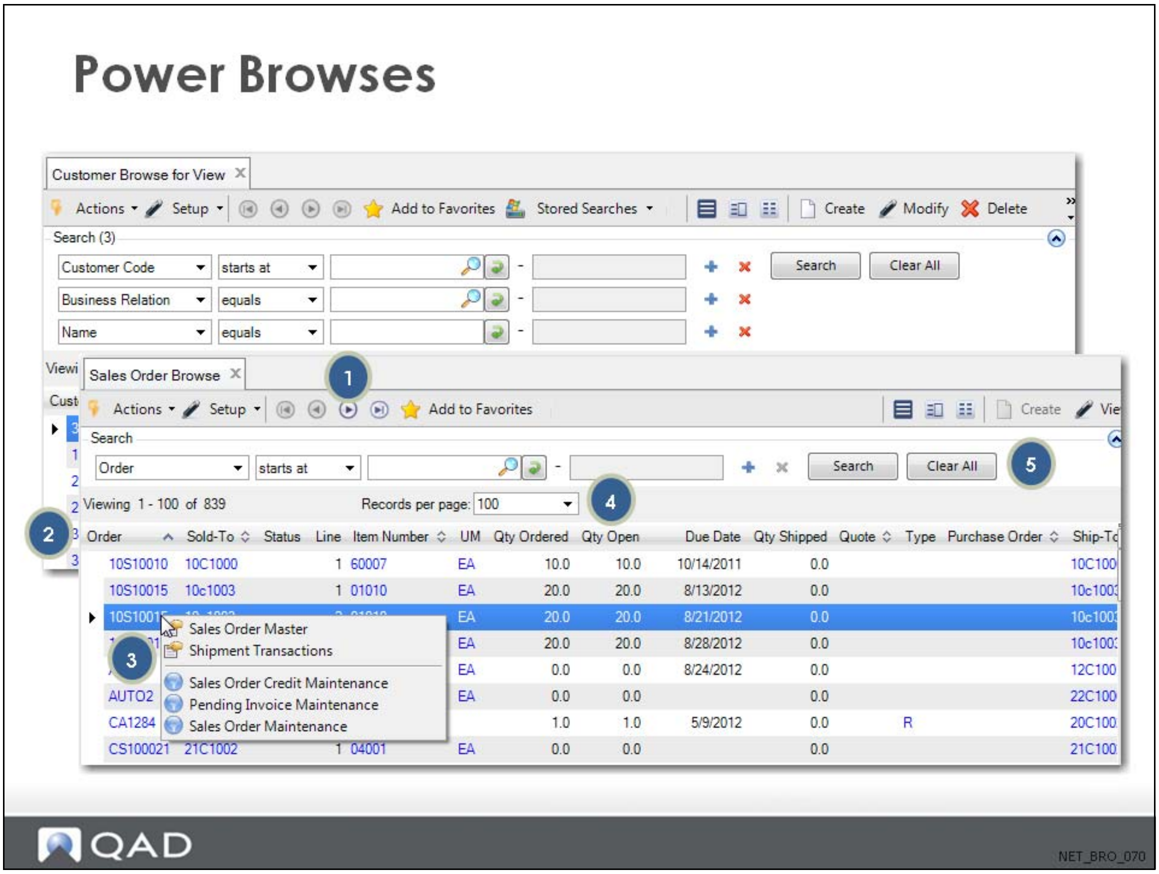
Lookup Browses



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

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

Power Browses



A power browse can filter, sort, print, and graph data. Columns that cannot be sorted are generally non-indexed fields. Sorting by them degrades system performance. Component-based and non-component based browses share many of the same navigation features:

1. Use the navigation buttons to move through the records. The buttons from left to right move to the first set, previous set, next set, last set.

2. Drag columns by their headings to rearrange the display or click any column heading to sort in ascending order; click again to sort in descending order.

3. Blue text indicates a drill-down. Right-click any value to display associated links: either a more detailed browse, a related program, or an external Web page. This slide shows the drill-downs associated with the Order column.

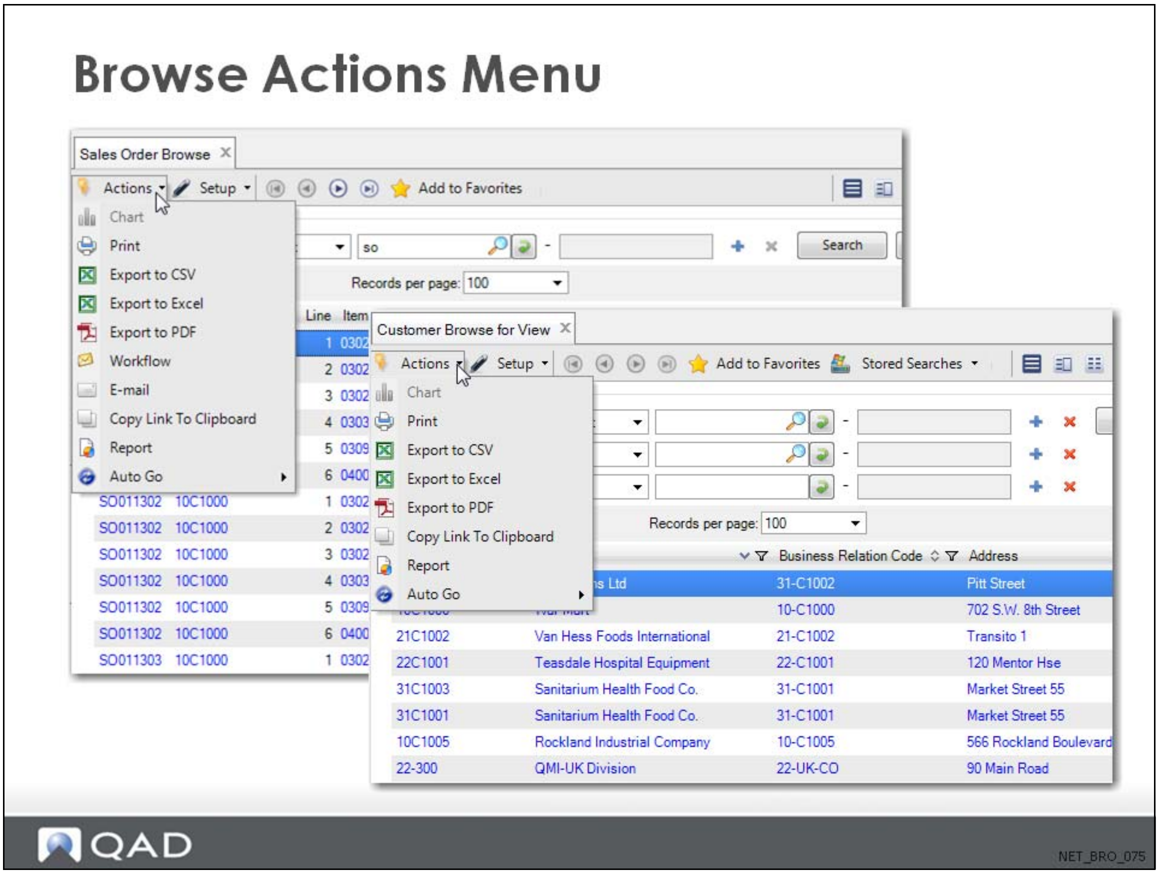
   Note Component browse drill-down applies to the whole record not a field.

4. 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. (In QAD SE, the Max Browse Records field in User Options Maintenance does not apply to browses in the QAD .NET UI.) Some browse options are only available when displaying All.

   Important Attempting to display a large number of records at once can adversely affect performance. Instead, use search conditions to focus on specific records you want to review.

5. Click Clear All to clear browse results.

Browse Actions Menu



The Actions menu contains export and reporting options, as well as additional workflow and e-mail options in non-component browses.

Chart. Select Chart or Grid View to toggle between viewing a chart or the grid view of a browse. If a chart has not been created for the browse, the Chart option is not available. Charts are set up using the Chart Designer on the Setup menu (see page 114 for details).

Print. Select to print the current browse. The system displays the standard Windows print dialog so that you can select a remote or local printer or print to file. When you print a browse, all columns in the browse are printed and scaled to fit the paper size of your printer.

Export to CSV. Exports the contents of the browse to a comma-separated-value (.CSV) file, which you can open in spreadsheet applications. The export includes only the columns that are marked as visible, so you can exclude columns from the export by hiding them in the grid.

Export to Excel/Export to PDF. Generates an Excel worksheet or a PDF file with the browse data.

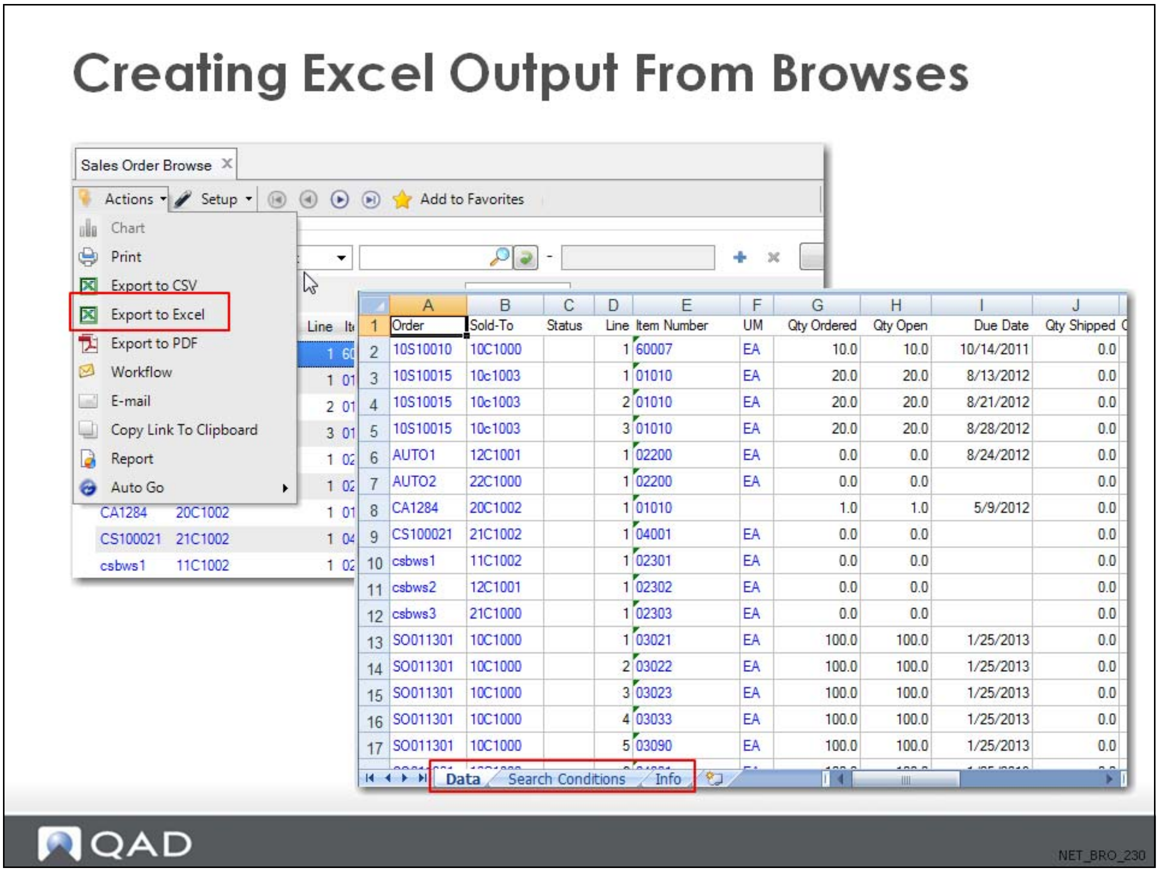
Workflow. Sends the current browse as link to a selected user using QAD's internal messaging system. When the user double-clicks the link in the e-mail message, the browse is displayed.

Email. Sends this browse as a program link using the client PC's default e-mail system.

Report. Generates a report of the current browse results.

Auto Go. Automatically refreshes the data in the browse at a user-specified rate.

Creating Excel Output From Browses



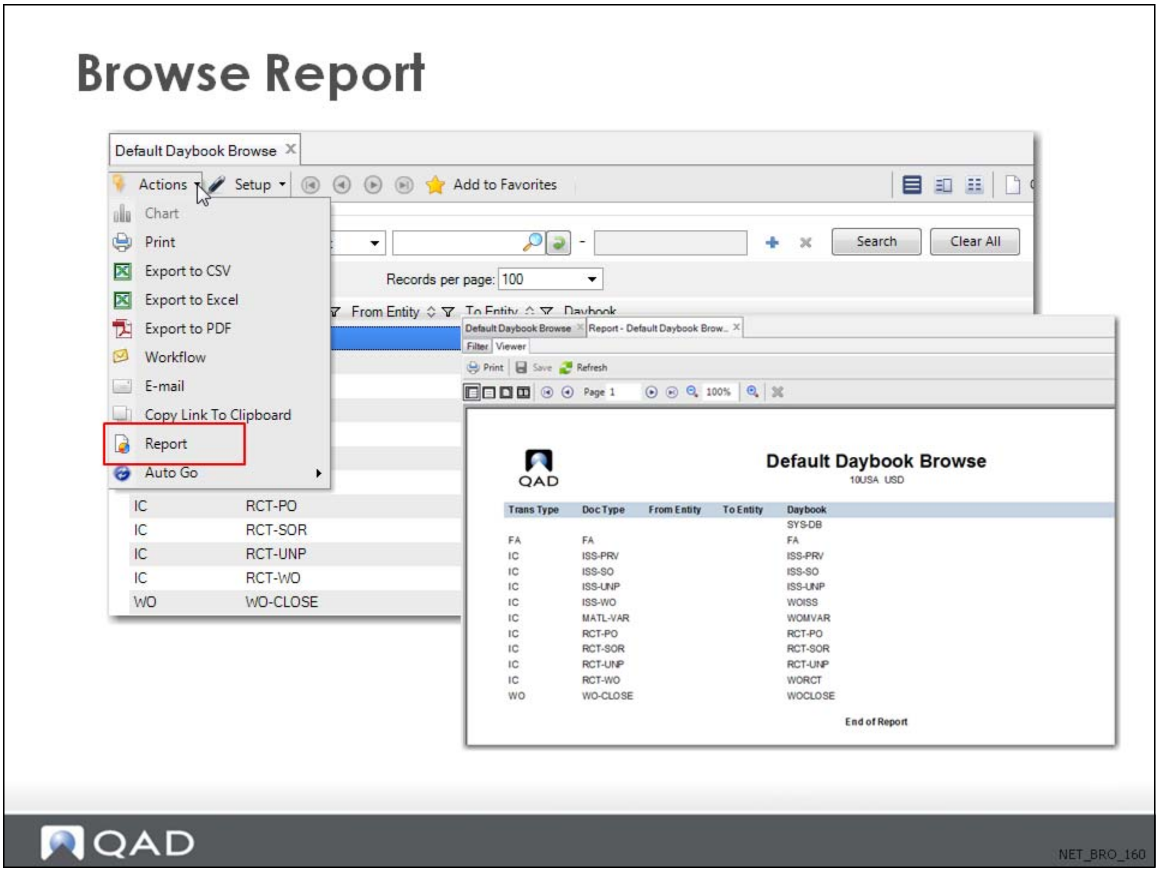
Click the Actions menu and choose Export to Excel.

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.

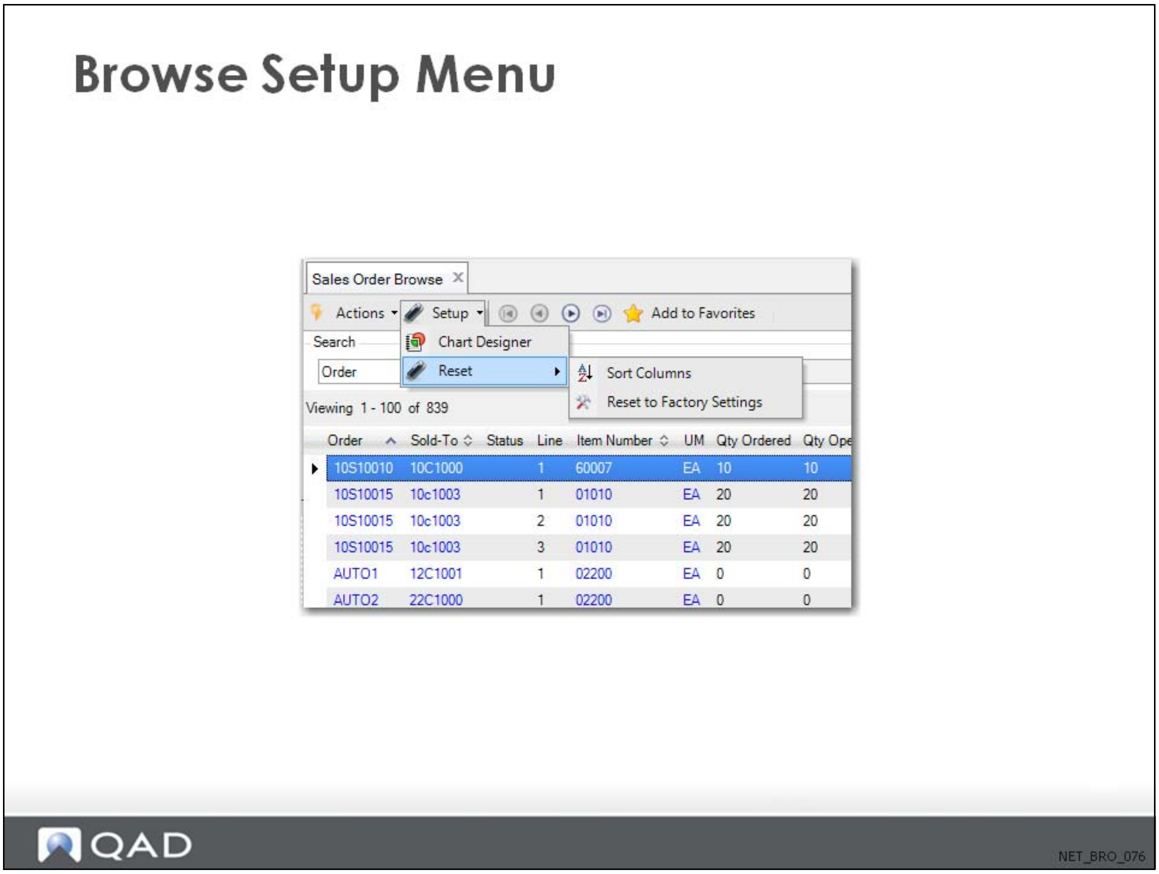
When you export data to Excel, any grouping is retained in the output.

Browse Report



The slide shows the output of a browse when Report is selected from the Actions menu. The data displays in a report viewer and can be printed as needed.

Browse Setup Menu

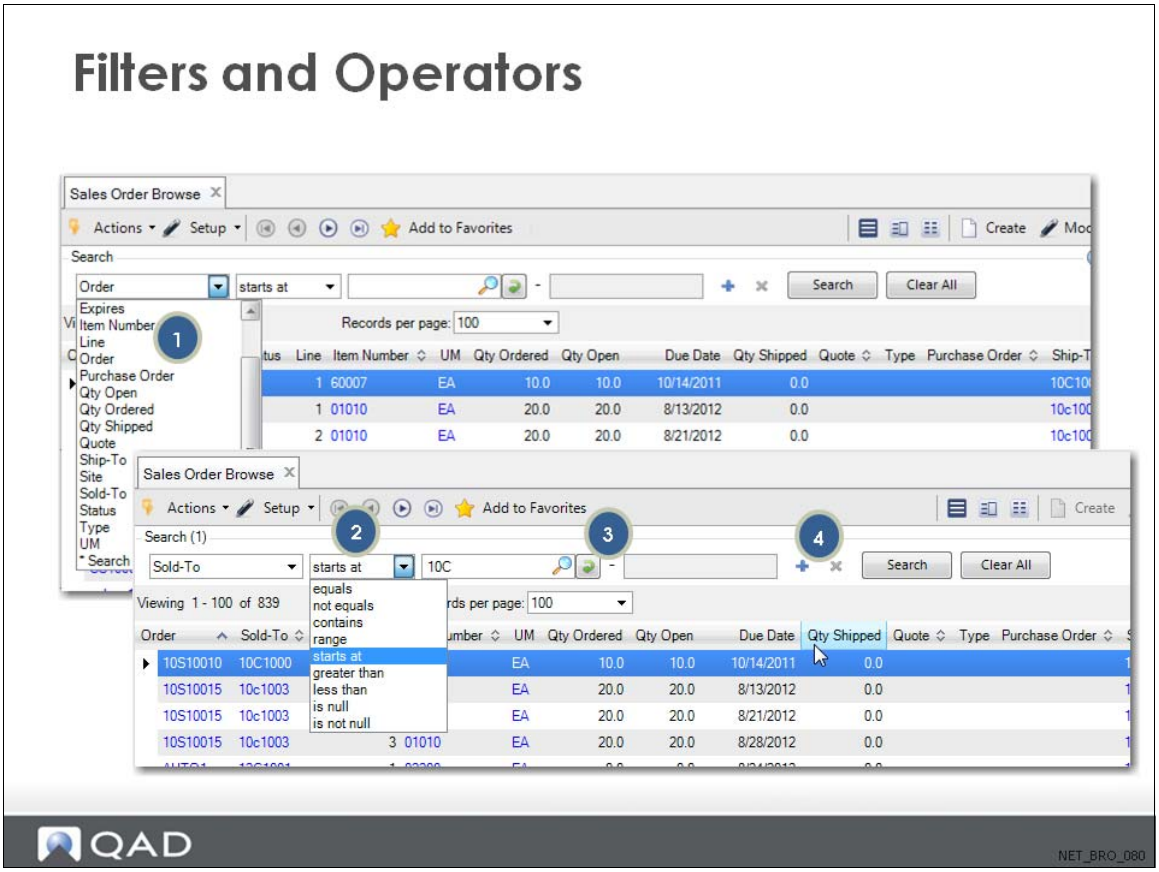


The Setup menu lets you access the Chart Designer discussed later (see page 104) and two reset options.

- Choose Reset|Sort Columns to change the direction of all column sorts back to initial settings.
- Choose Reset|Reset to Factory Settings to reset all aspects of the browse. Selecting this option changes the search criteria, the setting for number of records to view, and all aspects of the columns in the browse.

Note A similar Reset to Factory Setting option displays when you right-click the column headings in a browse (see “Right-Click Column Options” on page 94). Choosing this option resets only changes made to columns such as size, order, and sort direction.

Filters and Operators



1 Filtering. If you are using a component browse and stored search criteria exist, you can select one by name from the drop-down list at the top of the search criteria. (See page 97 for an example.) This sets up the filter criteria to produce preconfigured results. Otherwise (and always in a non-component browse), the search fields display with a default configuration.

Note For non-component browses, you can save a browse configuration to your Favorites and use the preconfigured criteria.

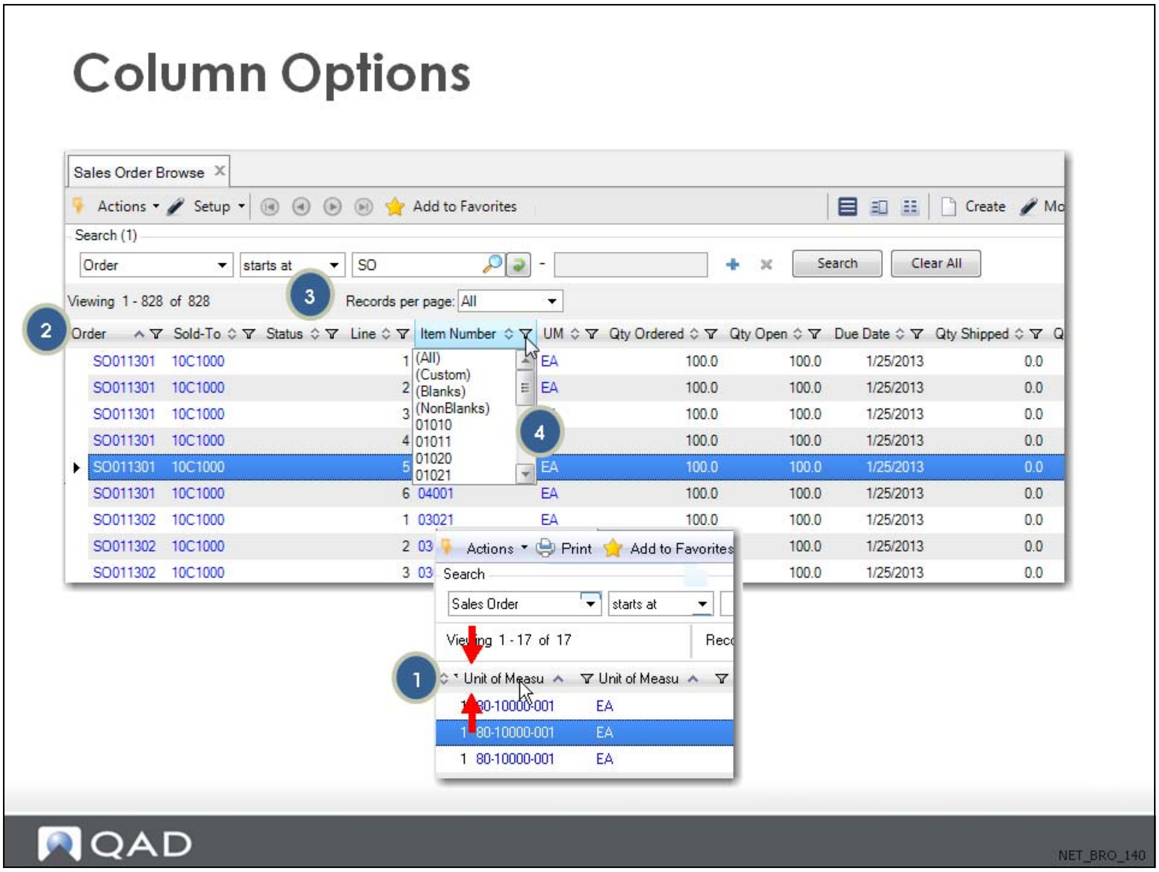
Refine the search using combinations of filters and wild cards (* and . for Financials browses).

2 Search Operators. The various operators include 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 Search Variable Mode. By default, you specify values for the search, such as Sold-To equals C10553. You can also search on logical relationships such as Sold-To equals Ship-To. Click the green toggle symbol next to the Search field to toggle between search modes.

4 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. Use the x button to remove search filters you no longer want.

Column Options



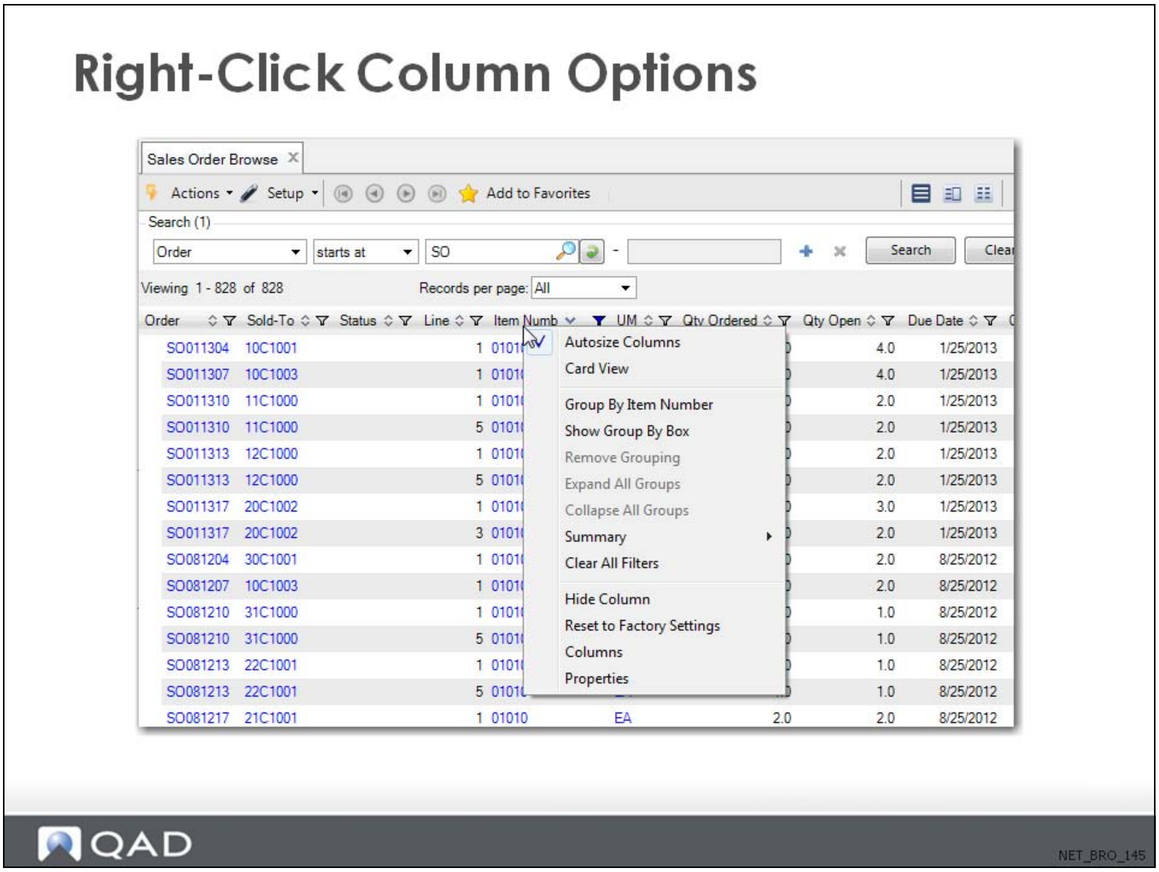
1 Change the column order by clicking the column header in the browse screen and dragging it to another position in the results list. The double red arrows appear when you can drop the heading in a new position.

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 When you are viewing all records (Records per page is All), each column header also features a drop-down filter option. Click the icon to display the available filters. In this example, you can filter Item Number by all (the default), blanks, non-blanks, or a specific item number. You can also select Custom, which displays a dialog for defining a custom query.

Right-Click Column Options

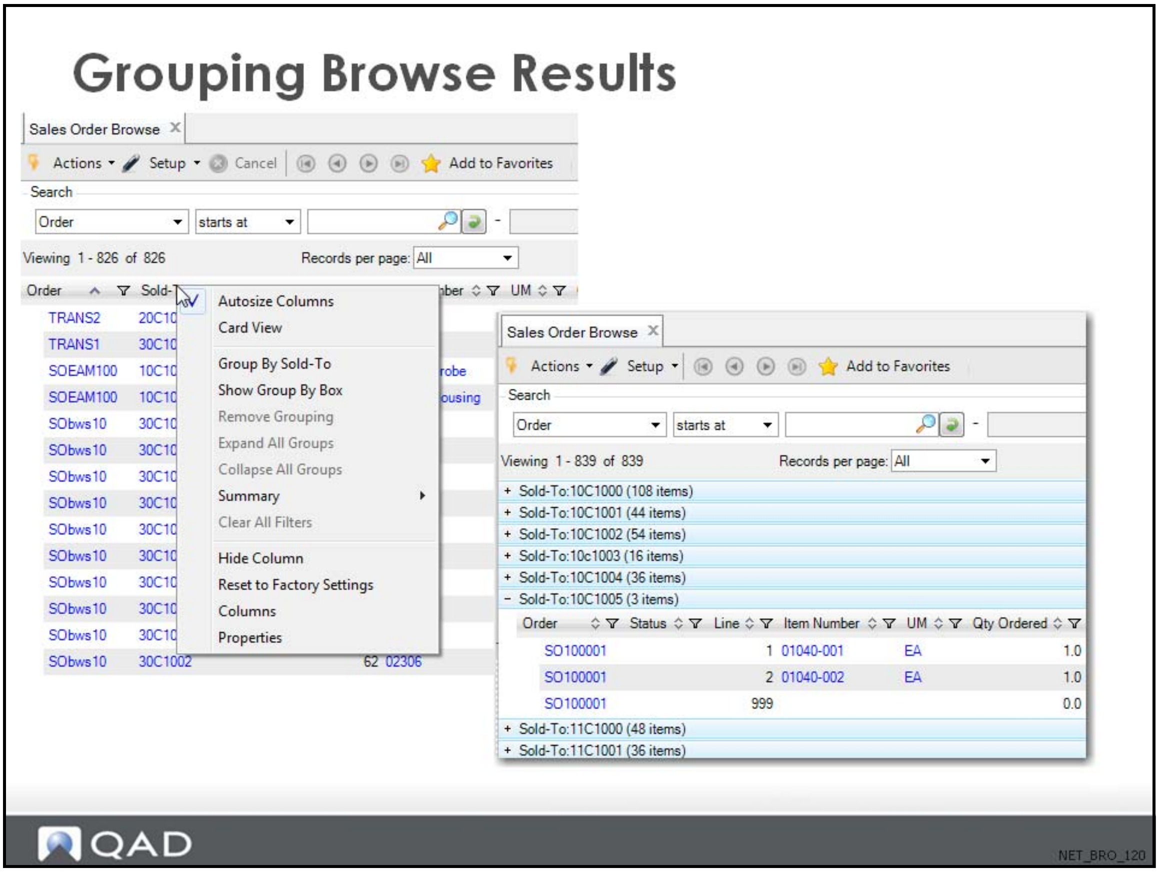


Right-click a column heading to display a list of options.

- Use Autosize Columns to resize browse columns based on the size of the displayed data. By default, the browse displays with columns already autosized. If you turn this option off and manually adjust column sizes, your settings for each browse are retained between sessions. If a cell’s data exceeds the column width, three dots (...) are displayed on the right.
- Use the Group By functions to create and manage custom views of the browse data. Group By functions are available only when all records are being viewed.
- Use Summary to get a summary of the data in the browse column.
- Use Hide Column to remove a column from display.
- Use Reset to Factory Settings to return to the default column display settings. The search conditions, autosizing, page sizing, and chart definition are all reset.

  Note This Reset is a subset of the reset on the browse Setup menu, which resets all aspects of the browse.
- Use Columns to display a list of all columns defined for the browse and toggle the show/hide settings. You can use this to restore a column that was previously hidden. This option displays the Column Maintenance screen, in which you select the columns to be displayed and the position in which they appear on the screen.
- Use Properties to display technical information about the data in the column. This includes the name of the current program and the database table and field where the data for the column is stored.

Grouping Browse Results

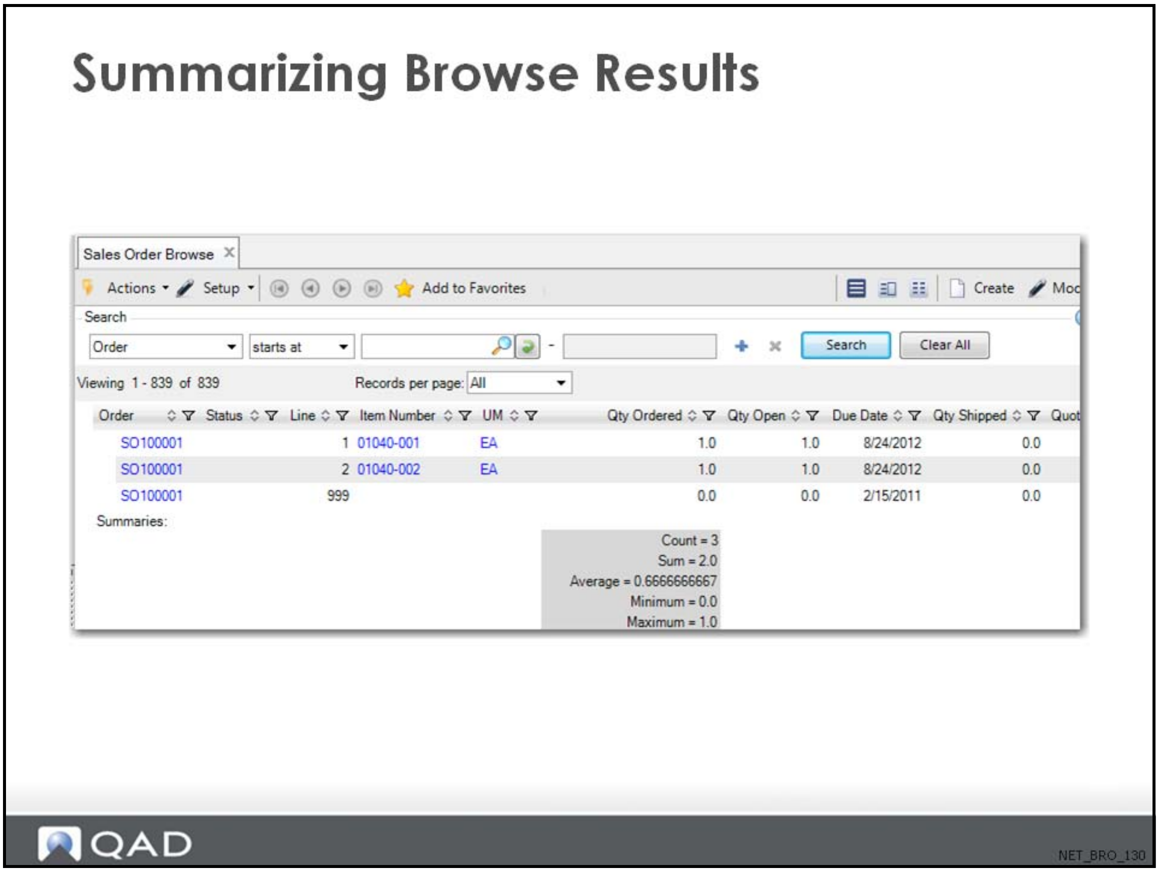


This slide shows the result of grouping sales orders by Sold-To Each group can be expanded using the plus sign next to it. You can also add other columns to the grid to create a group hierarchy.

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.

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. For component-based browse, you can also save these options as a stored search.

Summarizing Browse Results



The Summary right-click option lets you display summary information, depending on the column header you clicked. The option is context sensitive and displays choices based on the data you are viewing. For some columns, you can only summarize by count. But the Quantity Ordered column can be summarized by the total sum of ordered amounts, count, average, and the minimum and maximum amounts.

Count. Displays the number of records

Sum. Displays a total sum of the open quantity

Average. Displays the average of open quantity

Minimum. Displays the lowest open quantity

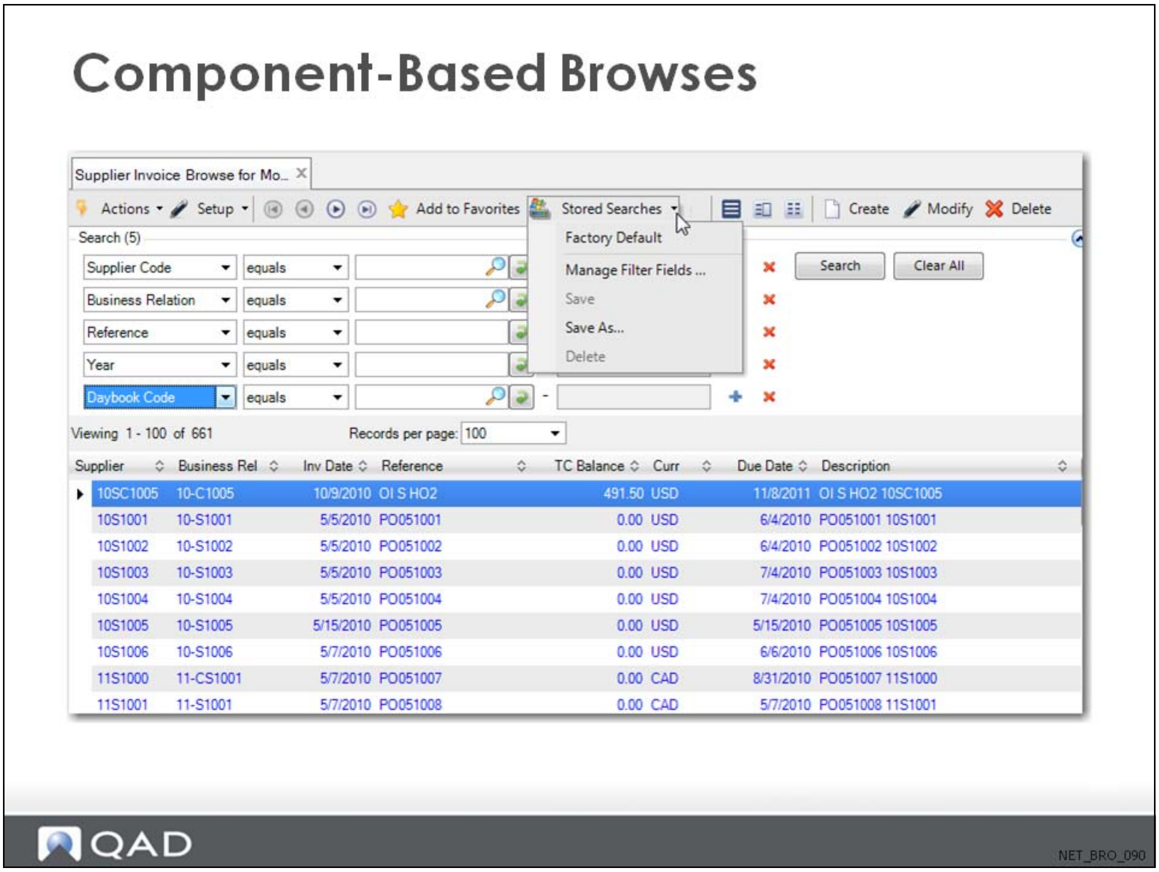
Maximum. Displays the maximum open quantity

You must be viewing all the records on the screen to use the Summary option. If there are more records than can be displayed, set Records per Page to All.

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.

Component-Based Browses



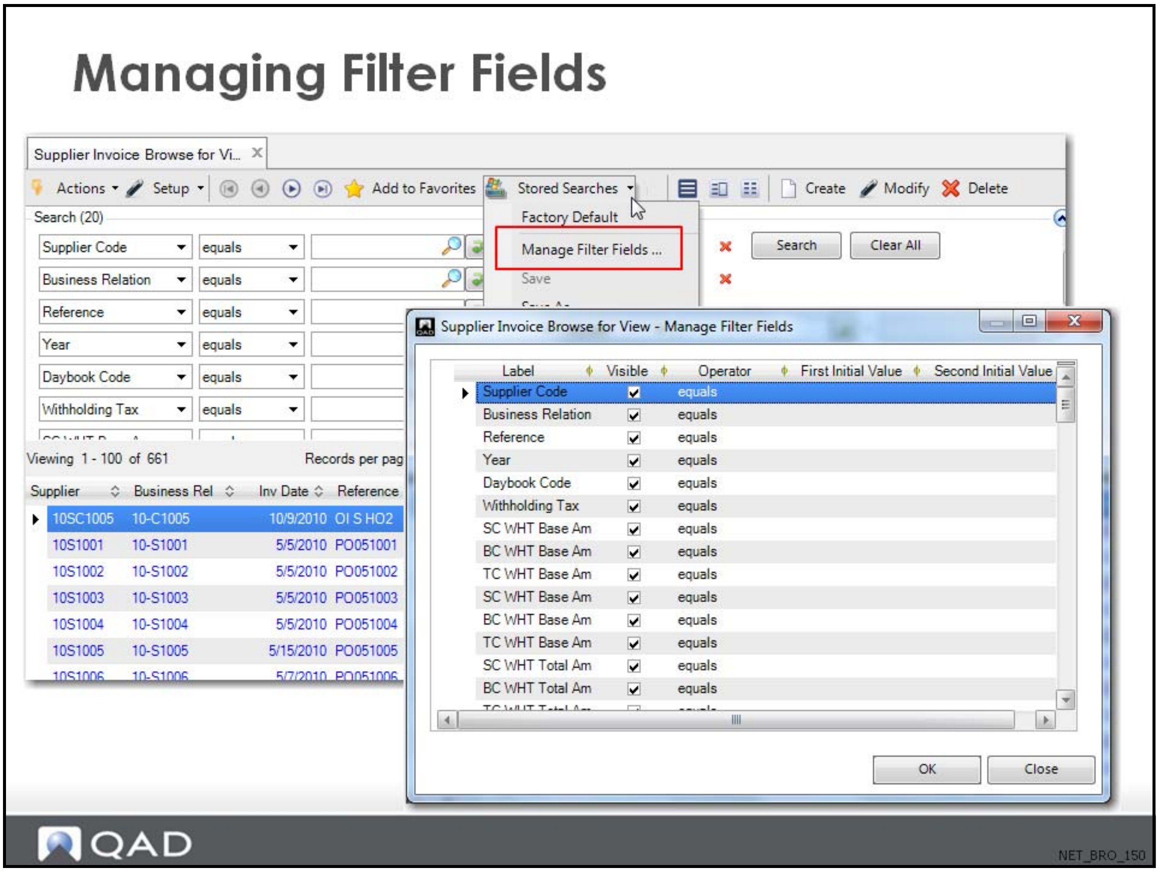
Component-based browses are launched when you view, modify, or delete a record created with a component-based activity. For example, Supplier Invoice View (28.1.1.3), Supplier Invoice Modify (28.1.1.2), and Supplier Invoice Delete (28.1.1.9) all launch browses, in which you select the record on which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

Component-based browses support some unique features.

- The way links work is different in these browses. Right-clicking a record lists programs that can be used to modify or display information about the record. This linking is maintained automatically by the system; you do not need to set up drill-down links in the way they are defined for non-component browses.
- Another special feature is stored searches. The Stored Search menu is shown in this slide. Using this menu, you can save a set of search criteria under a name. The stored search is then listed for selection when you launch this browse and can be reused. The settings you save apply to this browse only and are not listed in browses for other types of records.

  Note With non-component browses you can save a configured browse to your Favorites, which saves all your settings, but you cannot save the search criteria and load it directly into the browse.
- Additional options are available when you right-click a browse row. Some component browses support an advanced Excel integration.

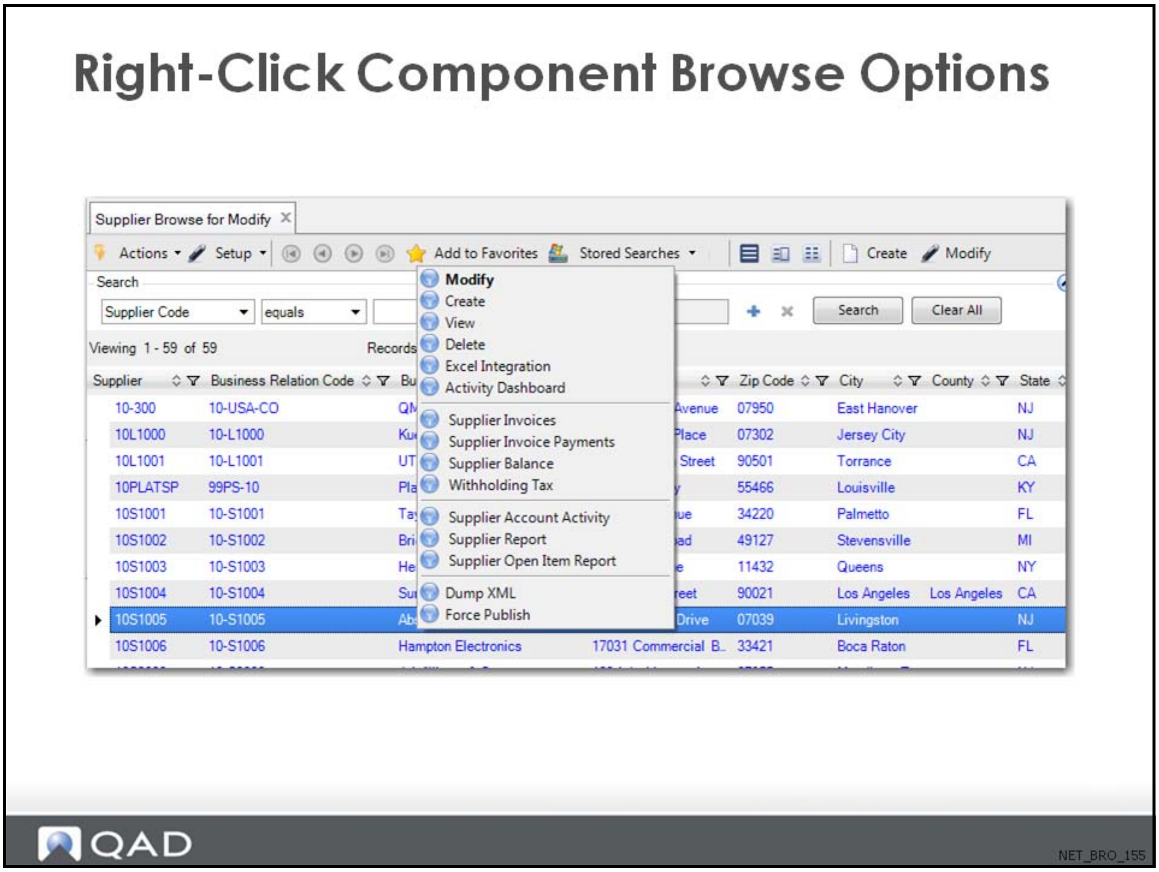
Managing Filter Fields



Manage Filter Fields displays all the search fields possible for this type of record. You can use the options 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.

Right-Click Component Browse Options



Component-based browses support additional drill-down and configuration options for individual records through the right-click menu. For example, when you right-click a grid line in the Supplier View browse, the options shown in this slide display. Most of the options let you navigate from a specific record to a related program. You can select a supplier and then see open items for the supplier, the supplier's balance, the supplier's invoices, and so forth. The exact options vary depending on what kind of record you are viewing.

Additional component-based options that are not related to specific records are:

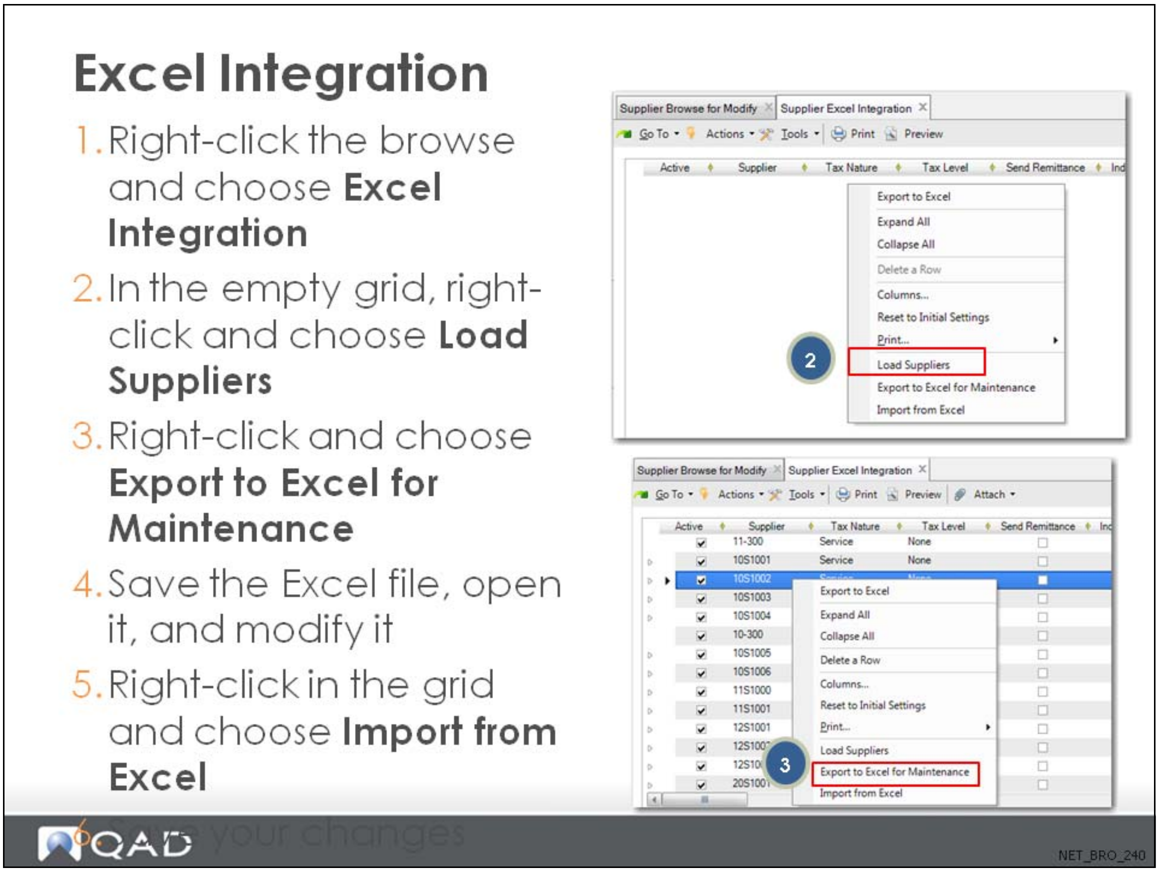
Excel Integration. This option lets you export data into Excel spreadsheets, create new data within Excel, and import it to the system database, where it is validated before being saved.

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

Dump XML. Select to export selected lines to an XML file for analysis. You are prompted to specify a name for the output file and a format. This option is described in more detail in *User Guide: QAD System Administration*.

Force Publish. This option is used with event publishing that lets changes to master data be published and synchronized with other external systems and is described in more detail in *User Guide: QAD System Administration*.

Excel Integration



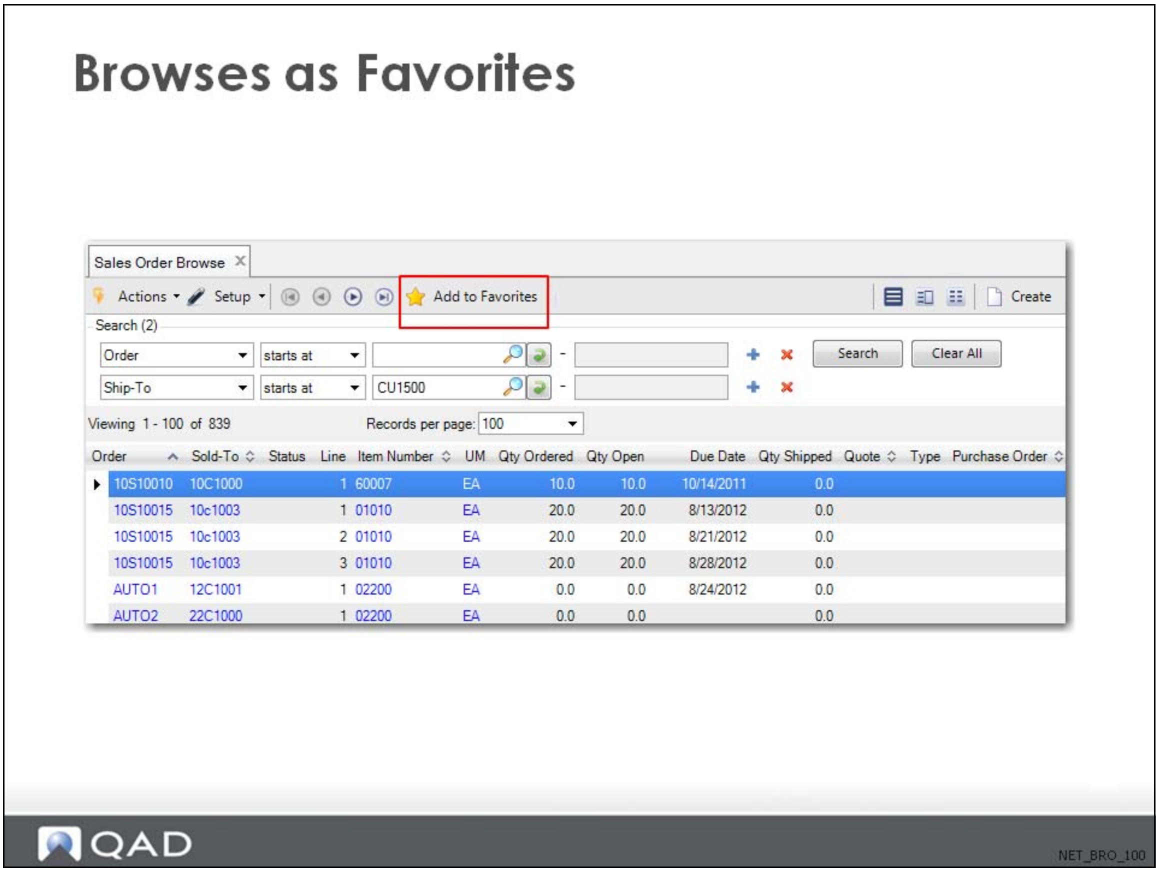
Using Excel Integration has multiple steps. This example uses supplier records.

1. Right click in a Supplier browse and choose Excel Integration. An empty grid displays.
2. Right-click in the empty grid and choose Load Suppliers. The Load option lets you retrieve all database records for a supported business component.
3. When the load completes, right-click in the grid and select Export to Excel for Maintenance.
4. Save the Excel file in a folder that can be accessed so that the Excel sheet can be modified. Make the required changes to the Excel file and save it.
5. Return to the supplier browse, right-click grid and select Import from Excel. Click Save to create or update the data in the system database.

The changes you made should now be reflected in the database records.

Note With Excel Integration, you can also import from Excel to create new records without exporting first.

Browses as Favorites

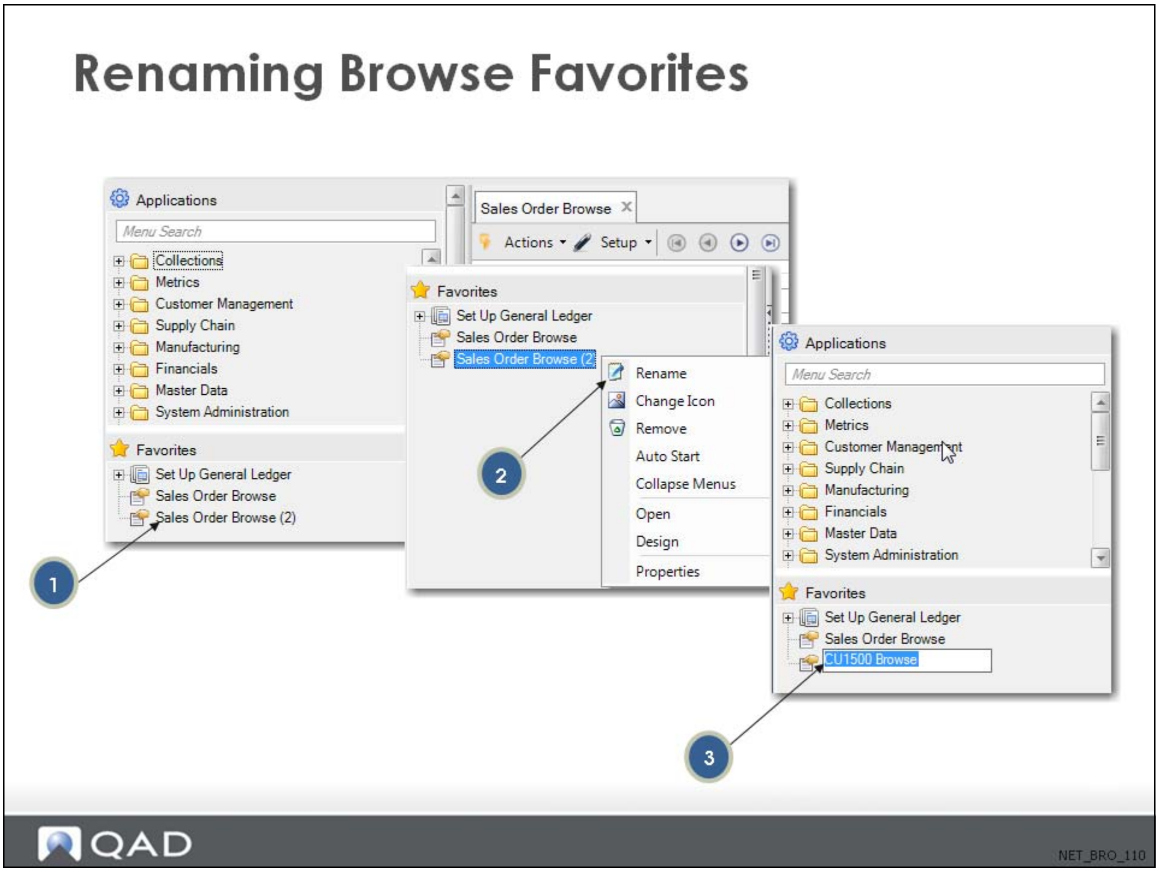


Non-component browses do not support the Saved Search feature, but you can save both types of browses to your favorites:

1. Click the Add to Favorites button.
2. 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.
3. 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.

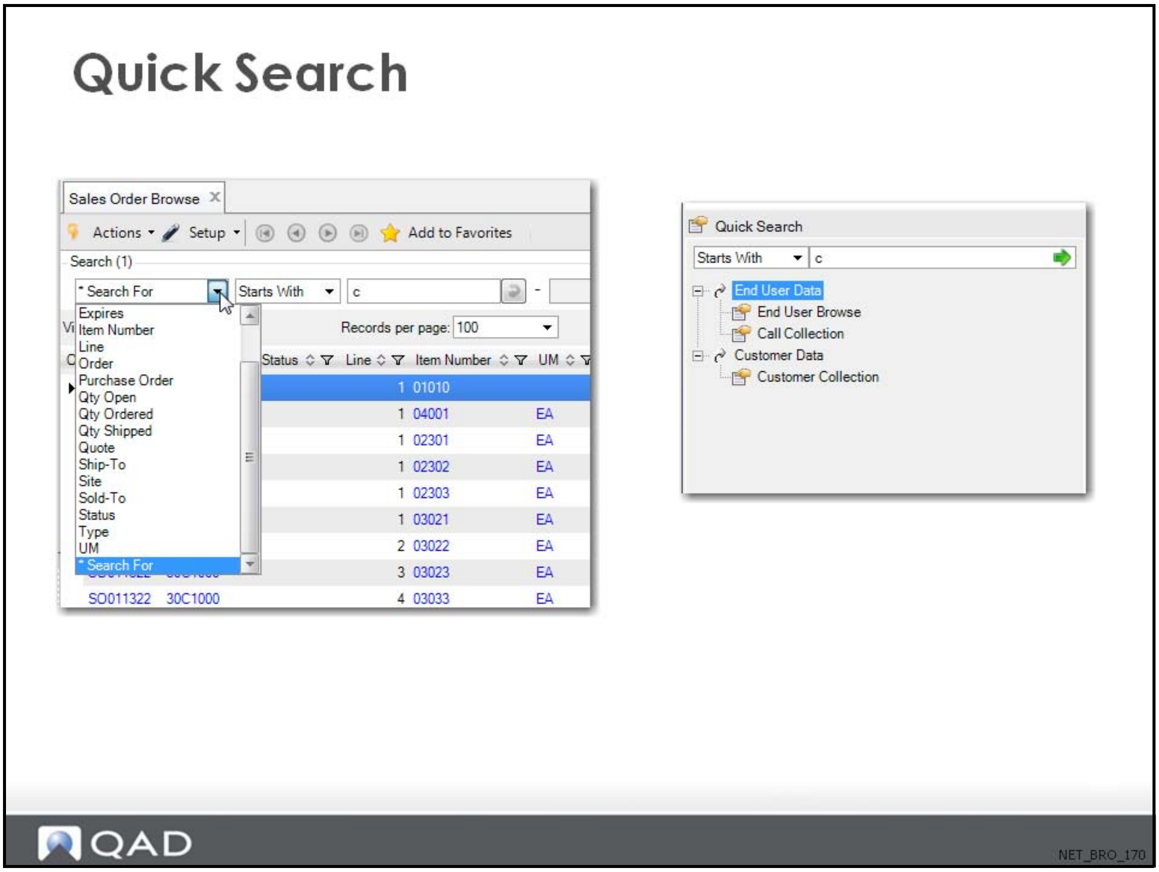
Renaming Browse Favorites



To rename a browse:

1. Right-click the browse.
2. Click on Rename.
3. Enter a new name for the browse.

Quick Search



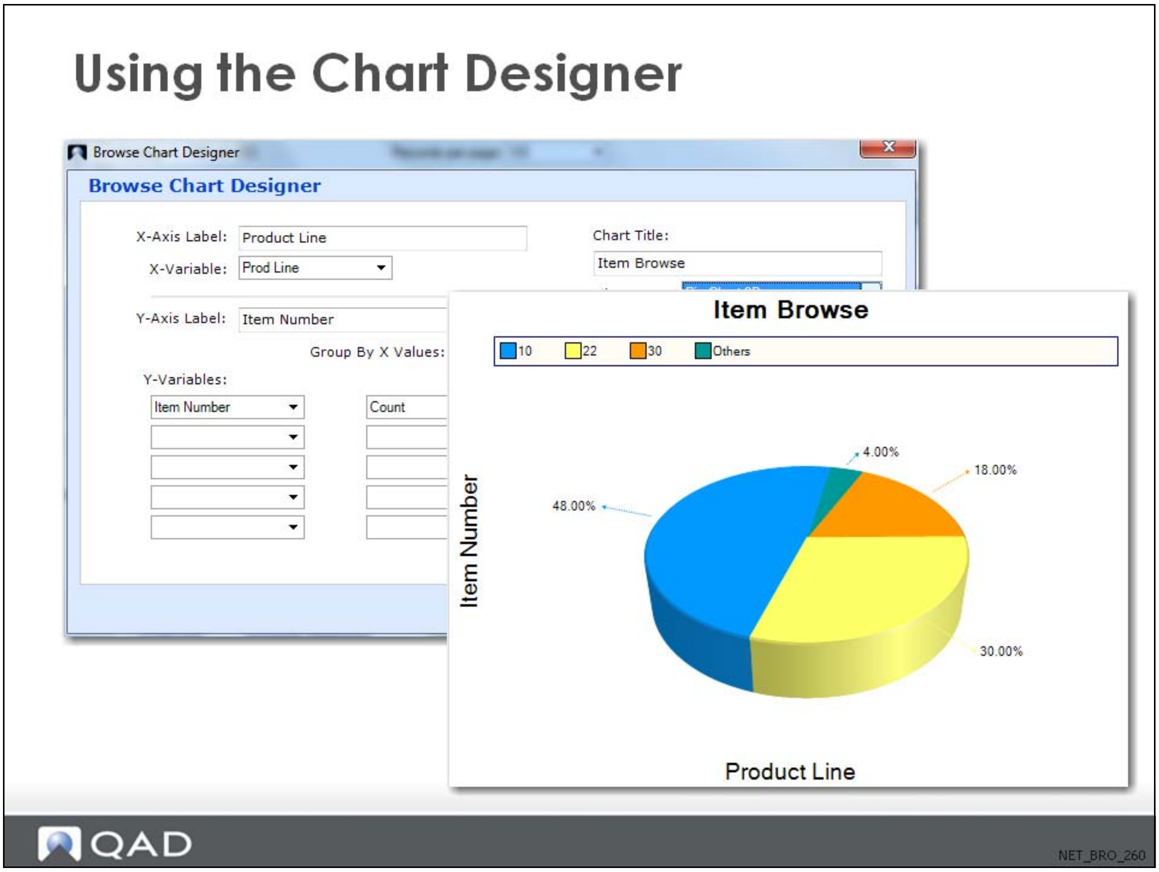
The Quick Search filter (*Search For) is available in all power browses and lets you search for a value across all of the fields in the browse. Quick Search looks for integers and text strings only and does not retrieve dates.

Use the *Search For option from the Search pull-down list in a browse to retrieve all the results that contain the search value in any of the columns. Choose the Contains, Starts With, or Equals operator for the system to use when searching across columns in the browse data.

You can also create groups of browses for quick search purposes by adding them to the Quick Search panel. 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.

After you have created the browse groups, select one and enter a search term in the Quick Search field. Press Enter to search the browses contained in the folder for the term. The results display in browse format in the workspace.

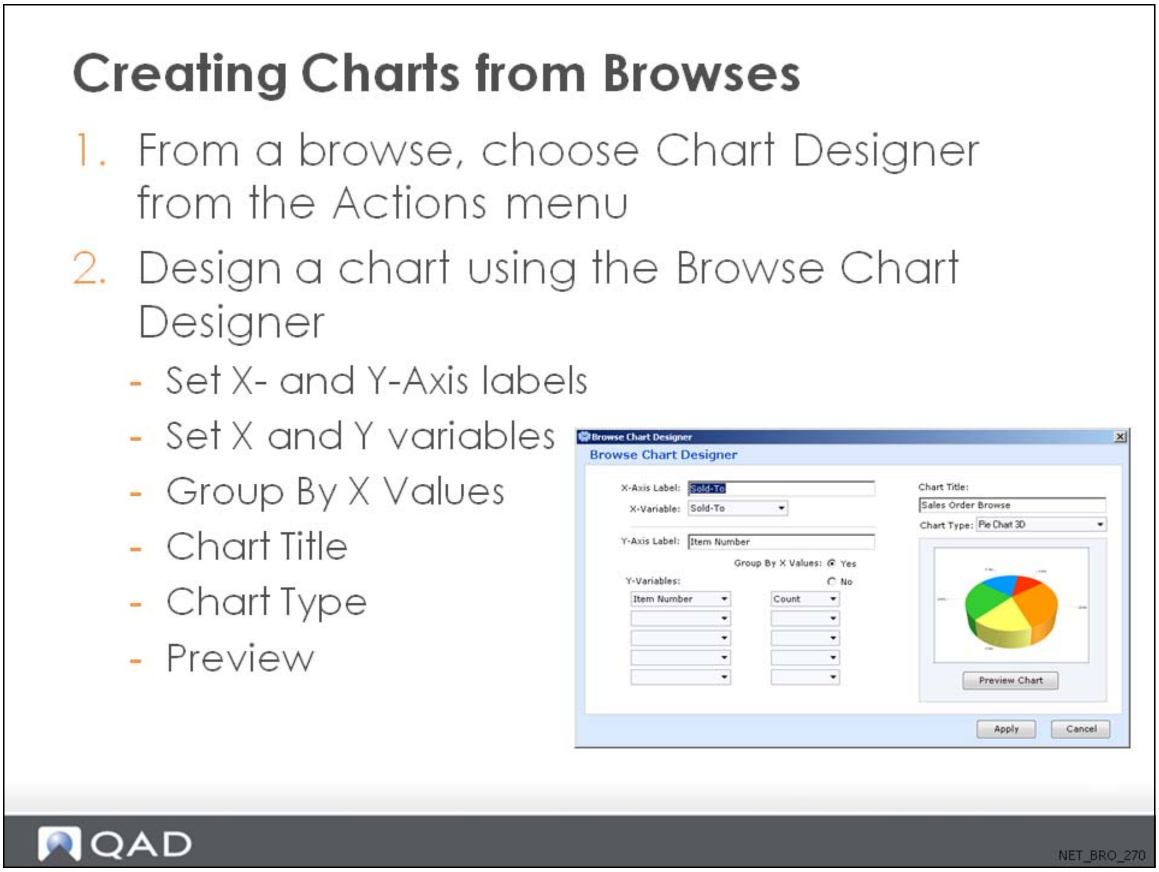
Using the Chart Designer



With the Browse Chart Designer, you can:

- Quickly generate graphical representations of browse data.
- Toggle between the standard browse display (called the grid view) and the chart view.
- Use the chart view editor to select data in a browse and display the data in graphical format, such as a pie chart or bar graph.

Creating Charts from Browses



The Browse Chart Designer lets you choose settings that define a chart:

X-Axis and Y-Axis Label. Enter the label for the chart's x and y axis data.

X-Variable. Select the variable for the x-axis data from a pull-down menu listing the available columns in the browse.

Y-Variables. Select up to five variables for the y-axis data from a pull-down menu listing the available columns in the browse.

Group By X Values. Select Yes if you want to display all the common x-axis data together in groups. Select No if you want to display the x-axis data individually.

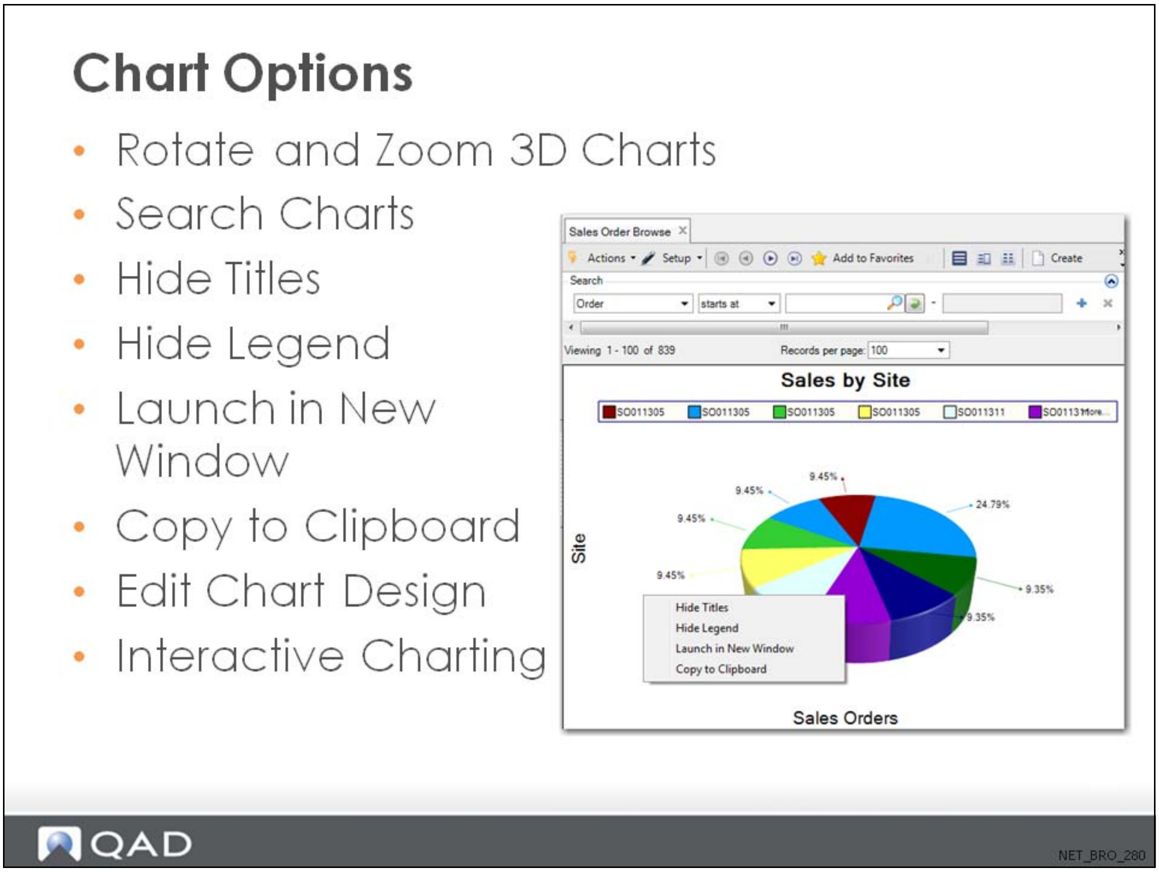
Chart Title. Enter a title for the chart.

Chart Type. Select from among the available chart types.

Preview. Click the Preview Chart button to view the chart before you save it.

You can toggle between the chart view and the grid view of the browse by selecting Chart or Grid View on the Actions menu. If you are in chart view, Grid View is displayed on the menu, and if you are in grid view, Chart is displayed.

Chart Options



While in chart view, you can do the following:

Rotate and Zoom 3D Charts. You can rotate 3D charts by pressing the Alt key and moving the mouse. Similarly, you can zoom 3D charts by pressing the Alt key and moving the mouse's scroll wheel.

Search Charts. The QAD .NET UI's browse search capabilities apply to the chart view as well as the grid view. By using the search capabilities you can interactively change the chart view of the browse.

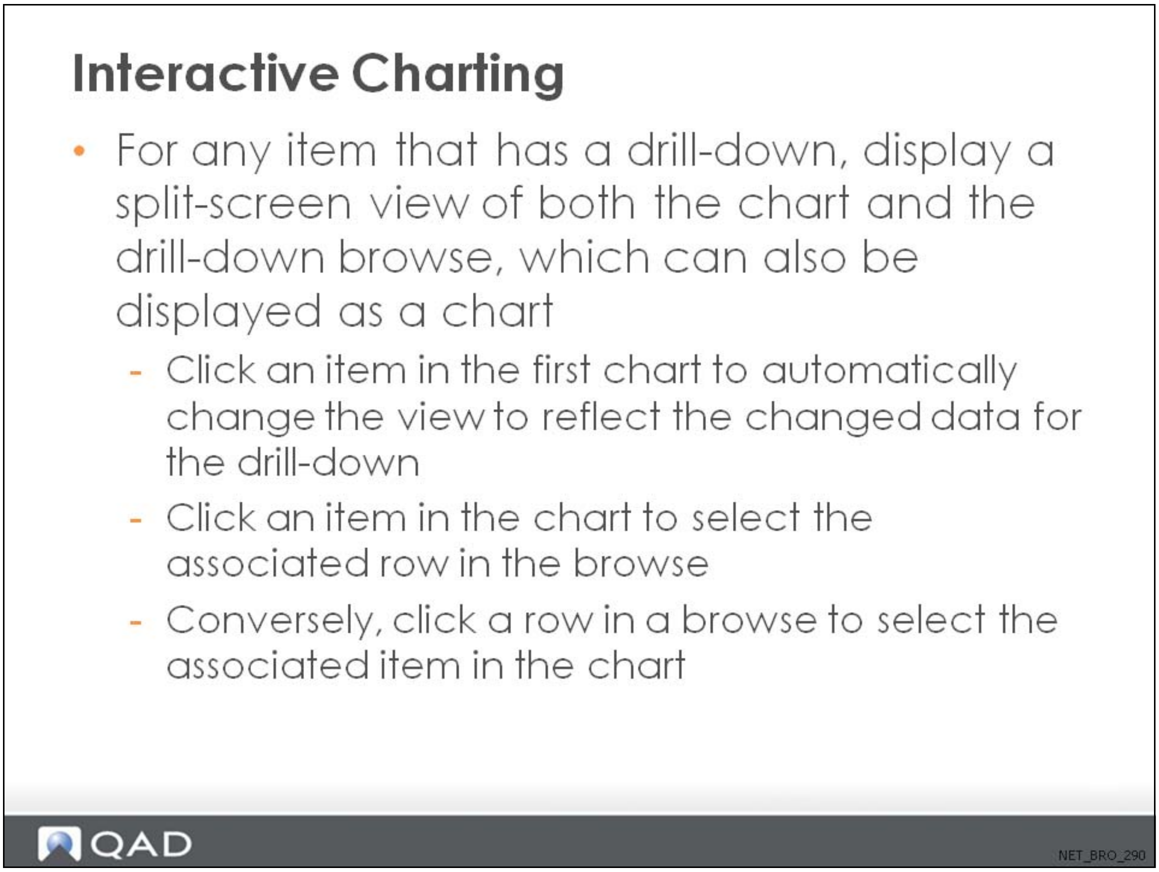
Hide Titles and Legend. Chart titles and legend are shown by default. You can hide (or show) titles by right-clicking and selecting Hide Titles (or Show Titles). Similarly, you can hide (or show) the legend by right-clicking and selecting Hide Legend (or Show Legend).

Launch in New Window. To launch a chart in a new window, right-click the chart and select Launch in New Window.

Copy to Clipboard. You can copy the chart to the clipboard so you can paste it in other applications. To copy the chart to the clipboard, right-click in the chart area and select Copy to Clipboard.

Edit Chart Design. To return to the chart editor, select Chart Designer from the Setup menu.

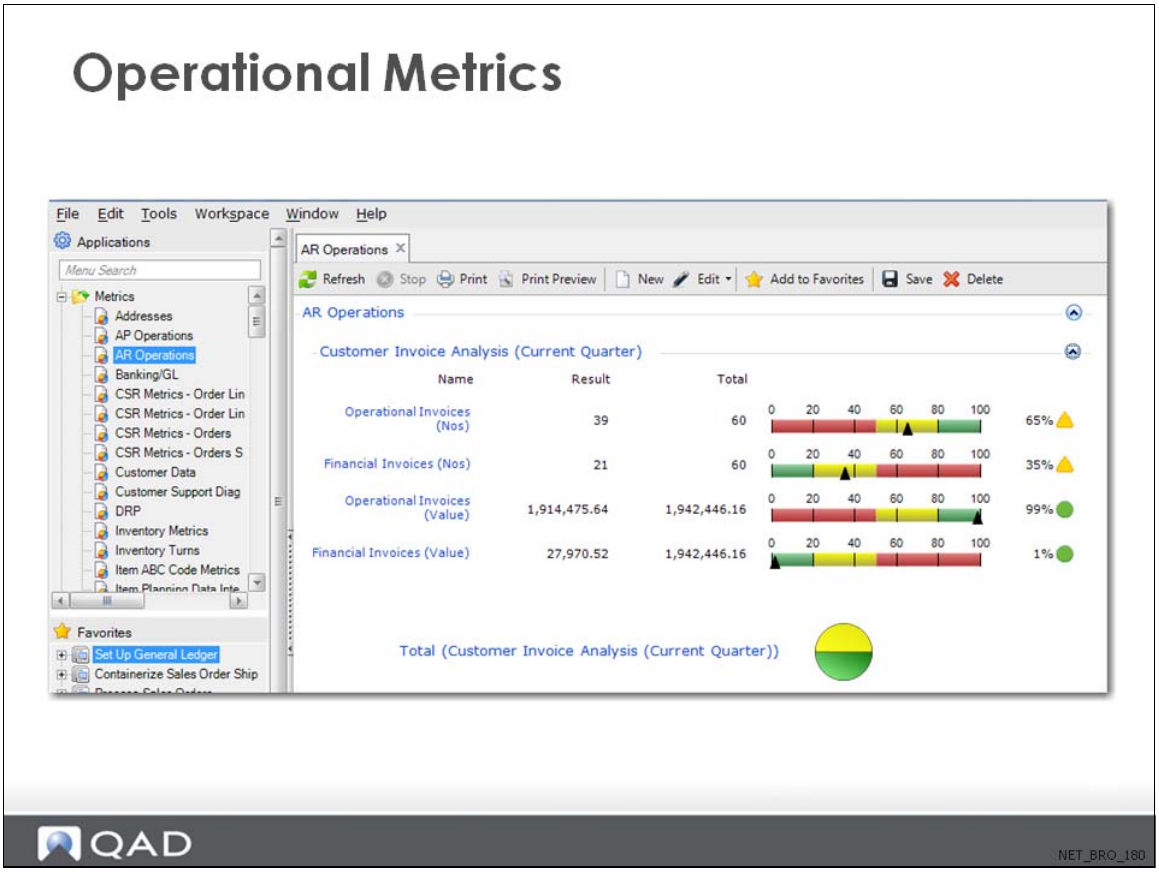
Interactive Charting



For any item in the chart that has a drill-down, you can have a split-screen view of both the chart and the drill-down browse, which can also be displayed as a chart.

- When you click on an item in the first chart, the drill-down chart will automatically change to reflect the changed data for the drill-down.
- Clicking on an item in the chart also selects the associated row in the browse.
- Conversely, clicking on a row in a browse also selects the associated item in the chart.

Operational Metrics

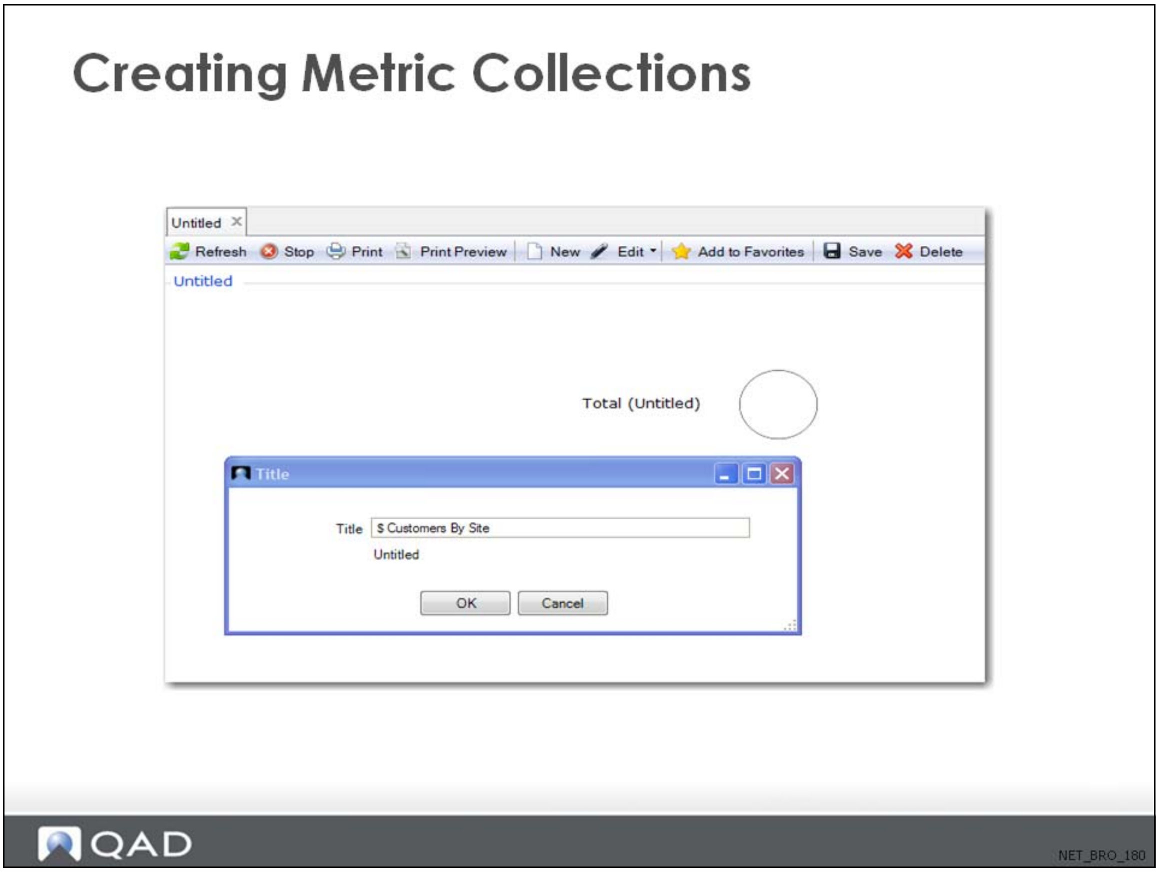


The Operational Metrics option lets you create a graphical metric from browse data. Operational metrics provide a live snapshot of production data, which lets you monitor in real time how the system is being used. You can use operational metrics to visually track any type of browse data, including data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

A number of predefined metrics are supplied with the system in the Metrics folder. In this slide, the Accounts Receivable metric displays different customer metric results.

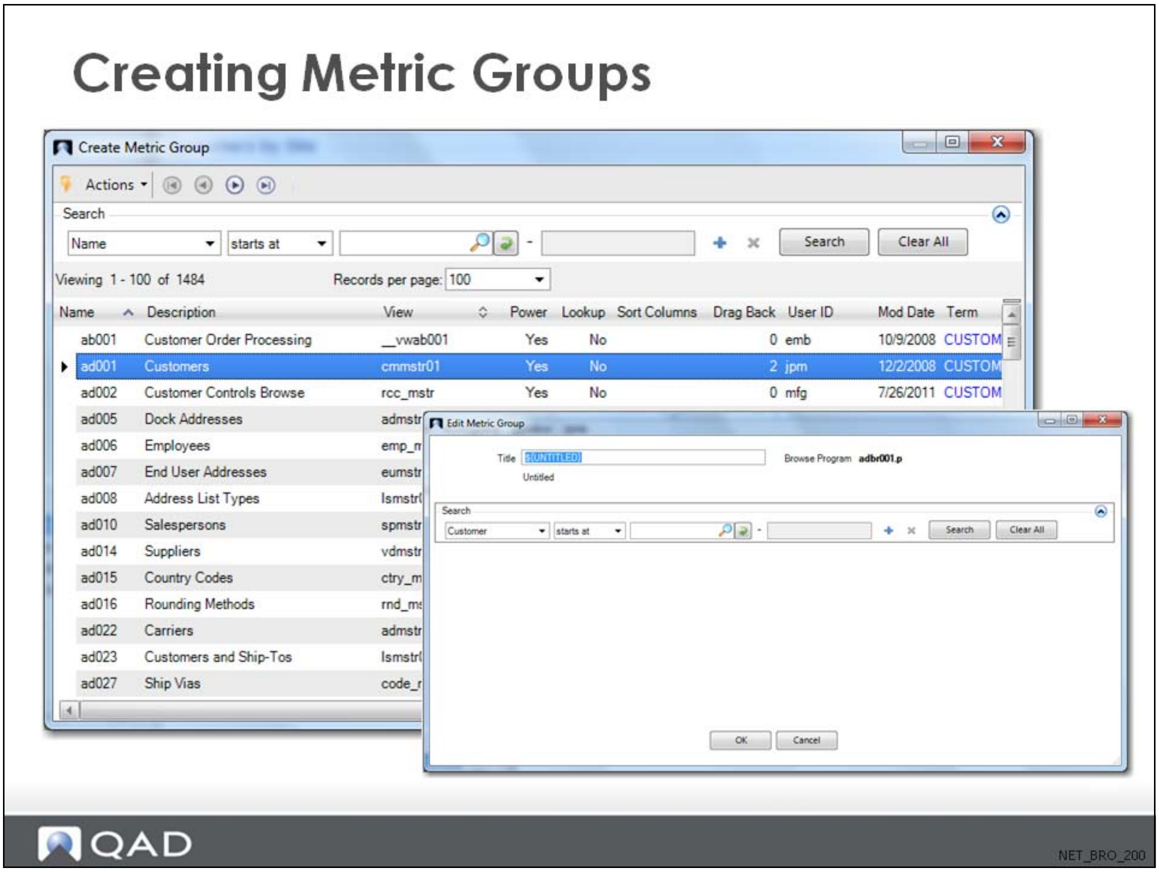
Metrics are created and managed by administrators using the Create Metric Collections function on the Administration menu.

Creating Metric Collections



1 Select Create Metric Collection from the Administration menu to create the initial metric collection. The system prompts you to name the collection.

Creating Metric Groups

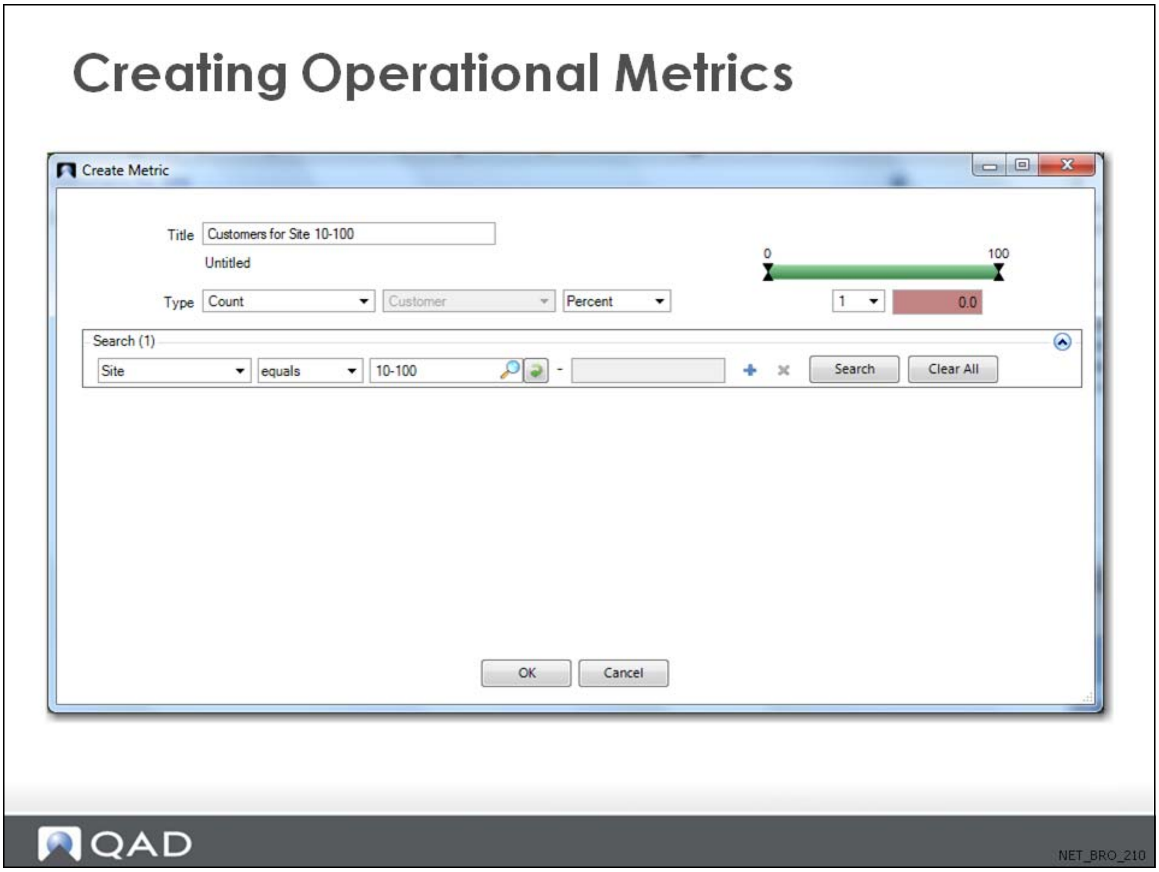


2 Right-click the collection title, or select Edit|Create Metric Group to create a metric group for the collection.

3 A list of browses in the system displays so you can select the parent browse for the group. Double-click the name of the browse to select it.

4 You are prompted to name the Metric Group. Enter a name for the metric group (for example, Customers by Site) and click OK. The system then prompts you to create the first metric.

Creating Operational Metrics



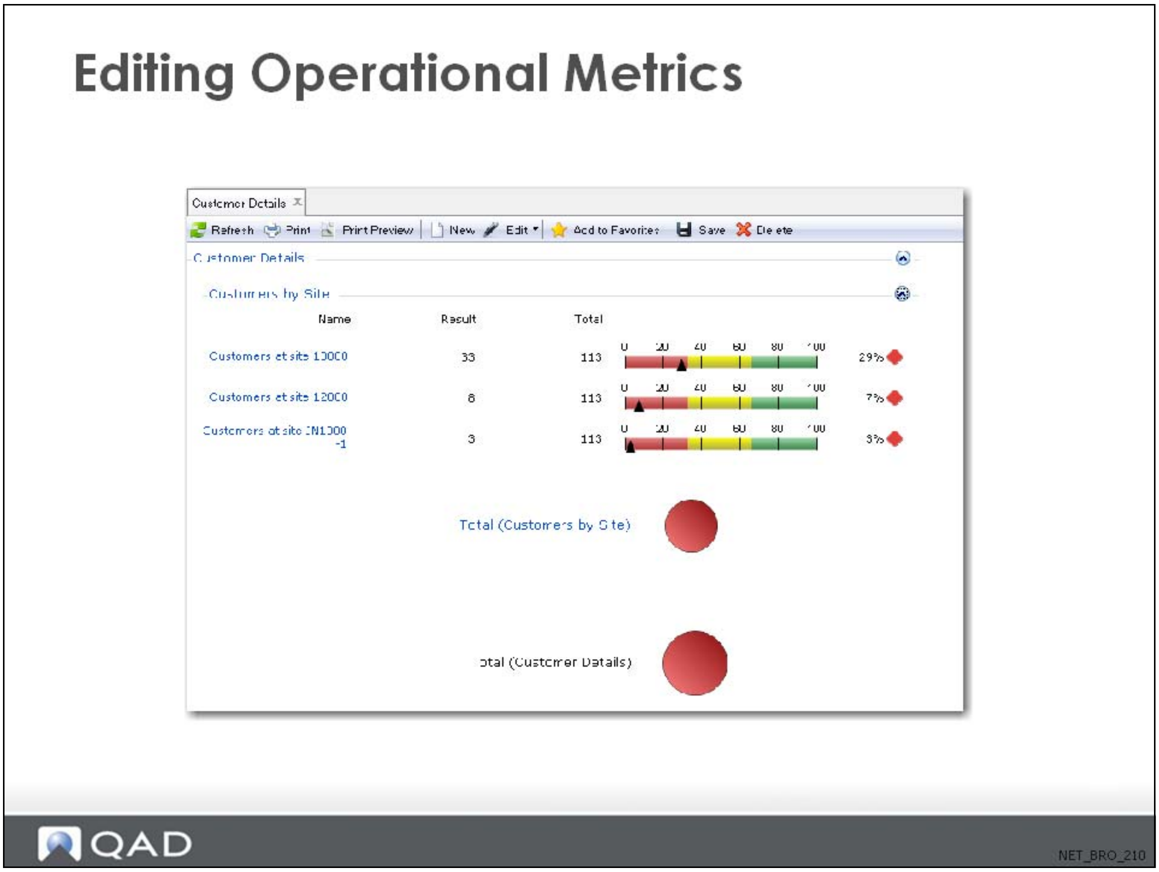
Title. Enter a title for the metric (for example, Customers at site 10-100).

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.

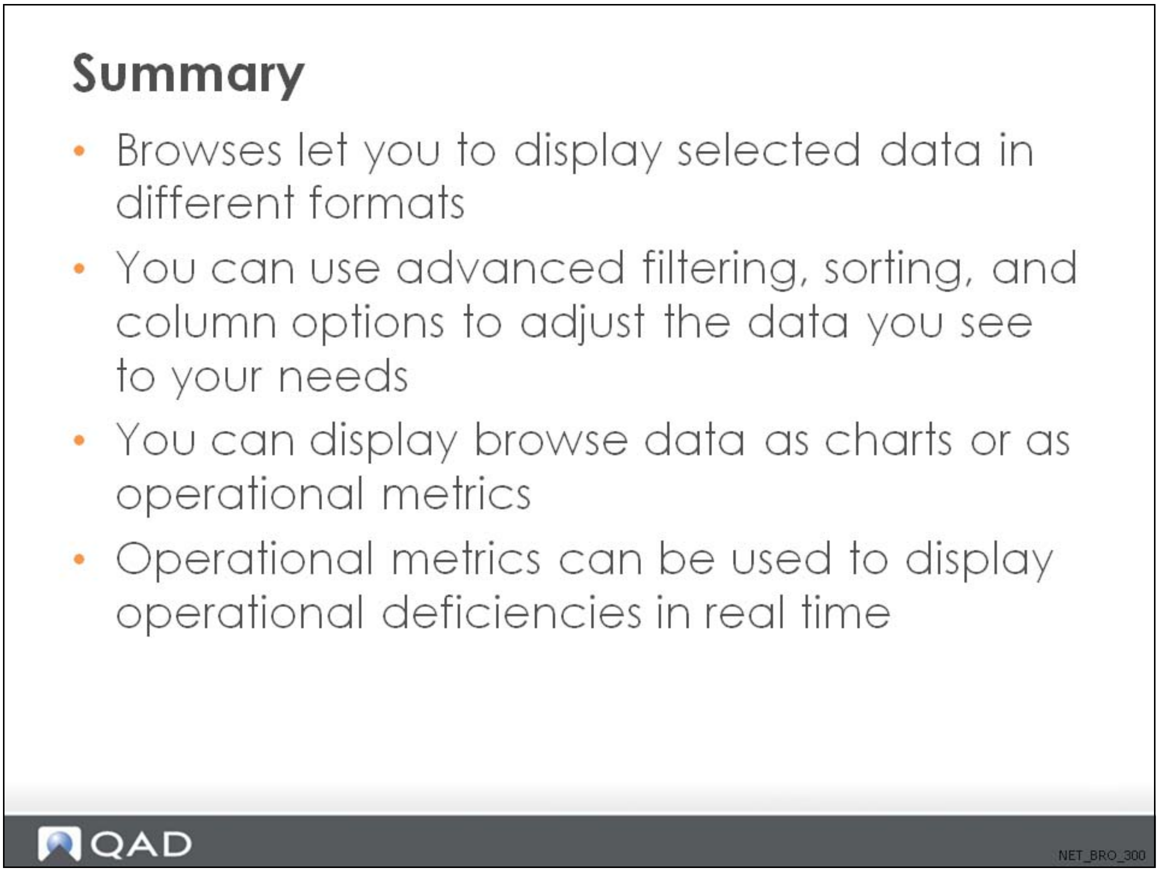
Editing Operational Metrics



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, rerun the individual browses from within their metrics.

Summary


Summary
Browses let you to display selected data in different formats
You can use advanced filtering, sorting, and column options to adjust the data you see to your needs
You can display browse data as charts or as operational metrics
Operational metrics can be used to display operational deficiencies in real time
QAD
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 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.

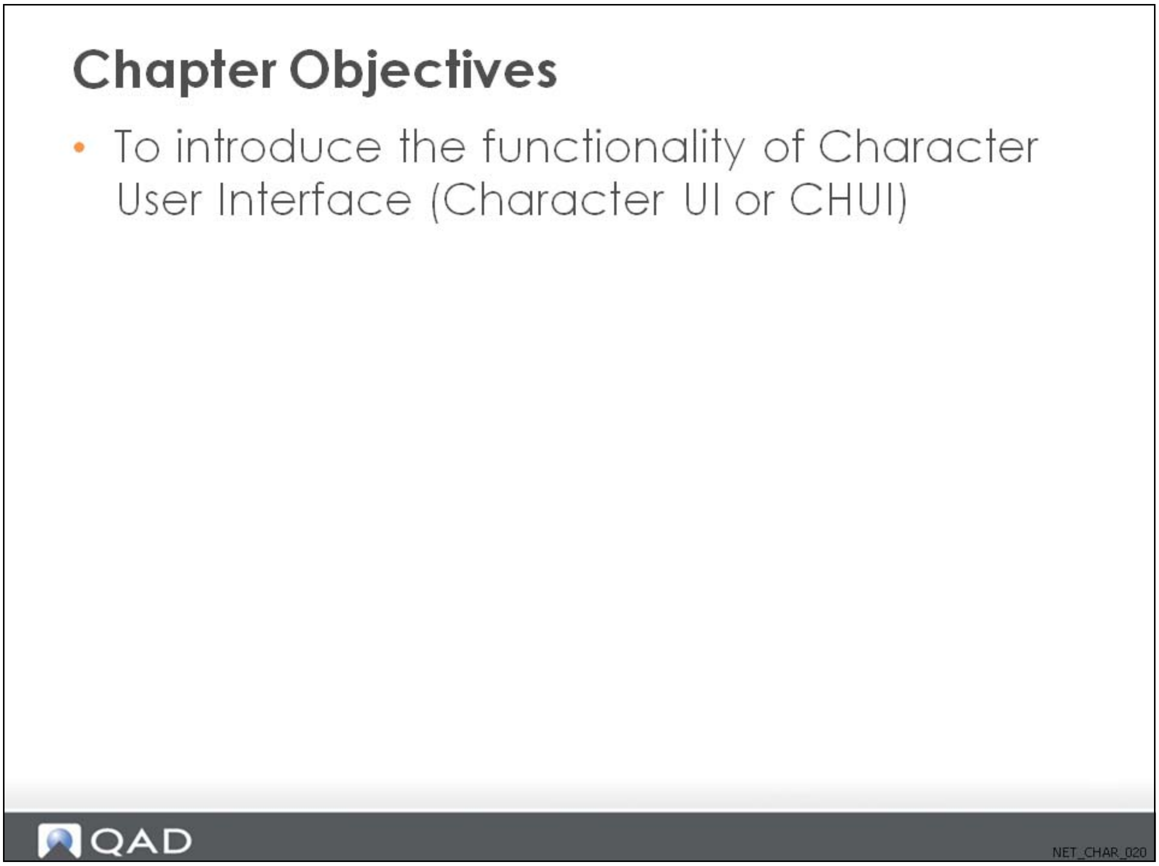
   Label the y axis label Part Number and select the variable item number and group by count.

   Select a 3D pie chart and run the chart.

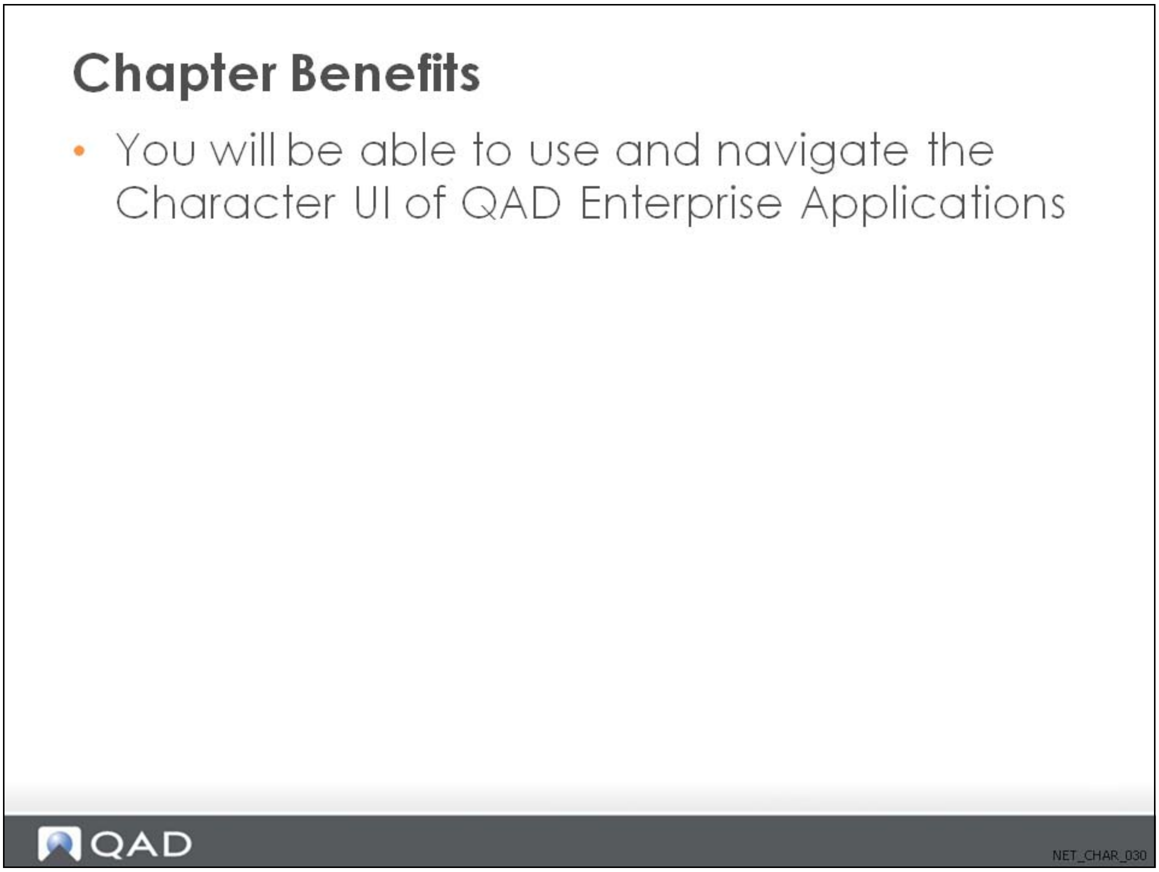
Chapter 6

Using the Character UI

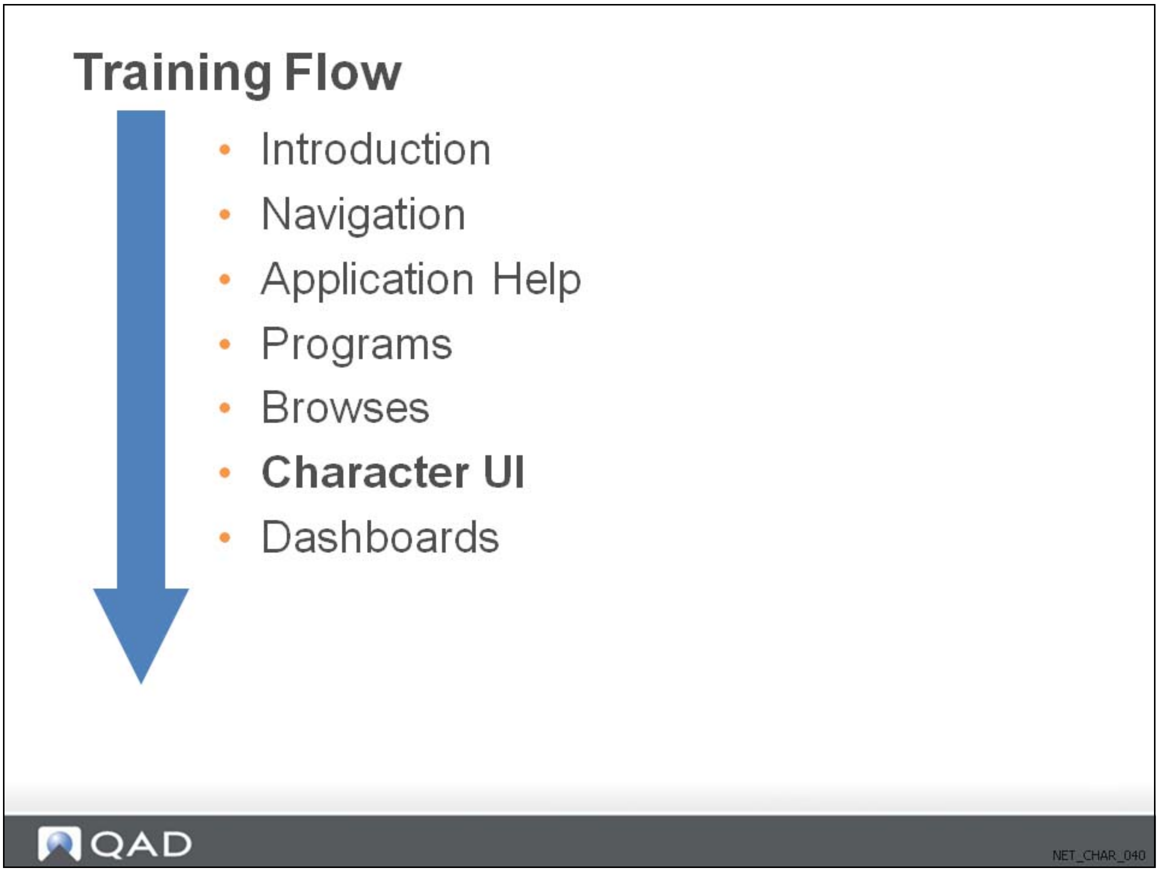
Chapter Objectives



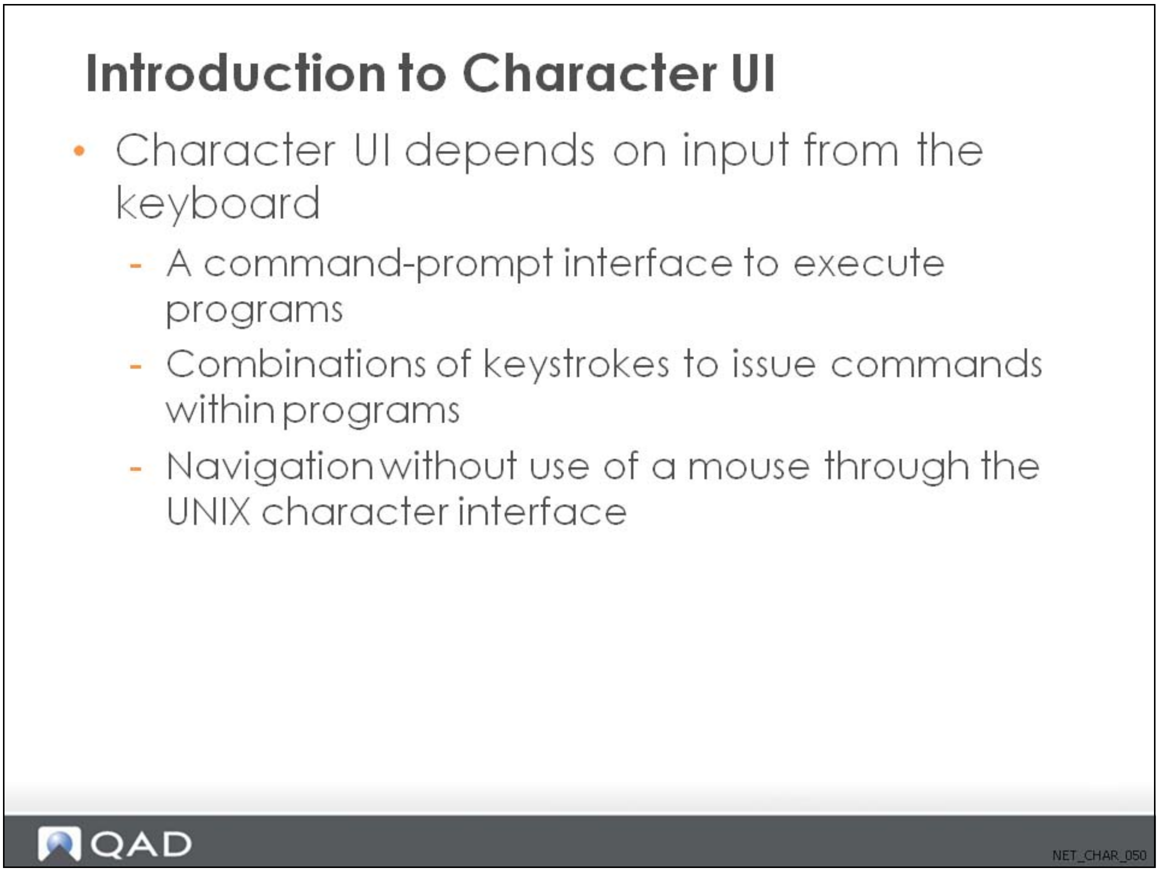
Chapter Benefits



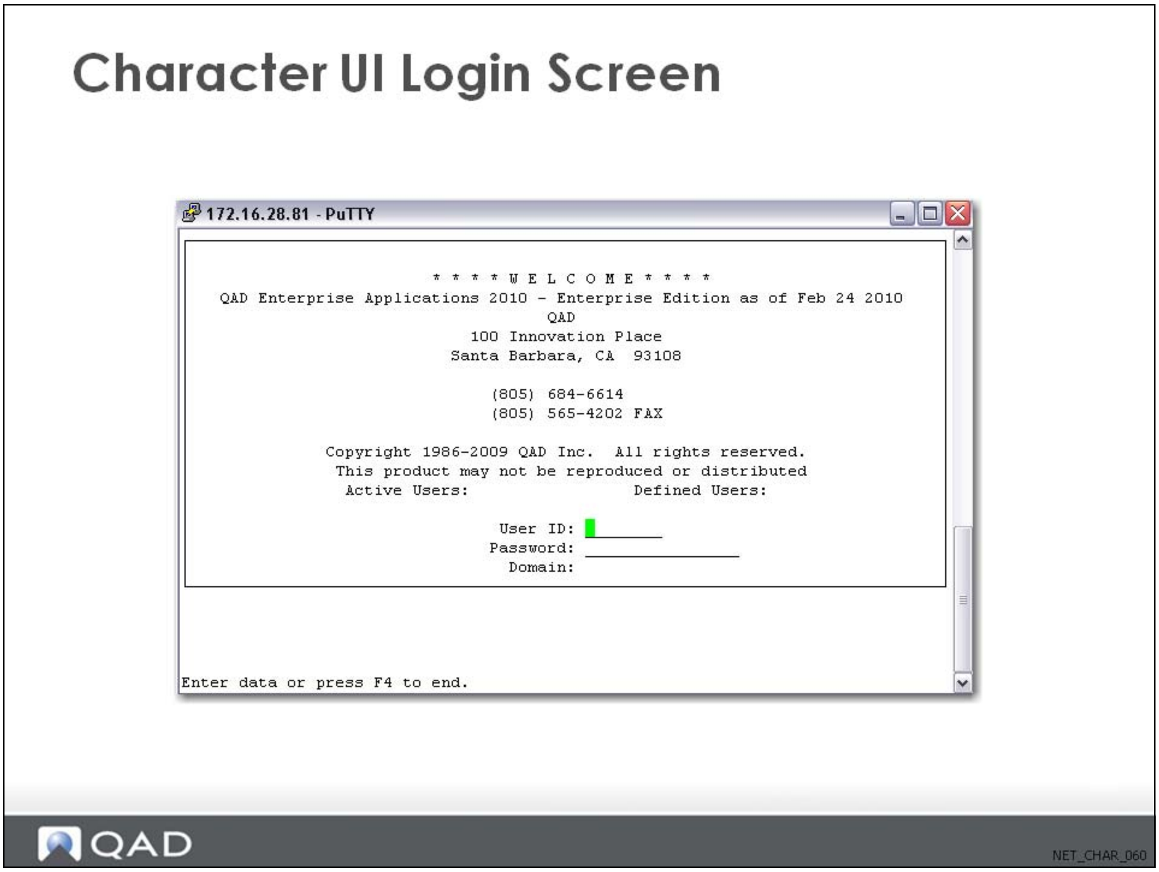
Training Flow



Introduction to Character UI

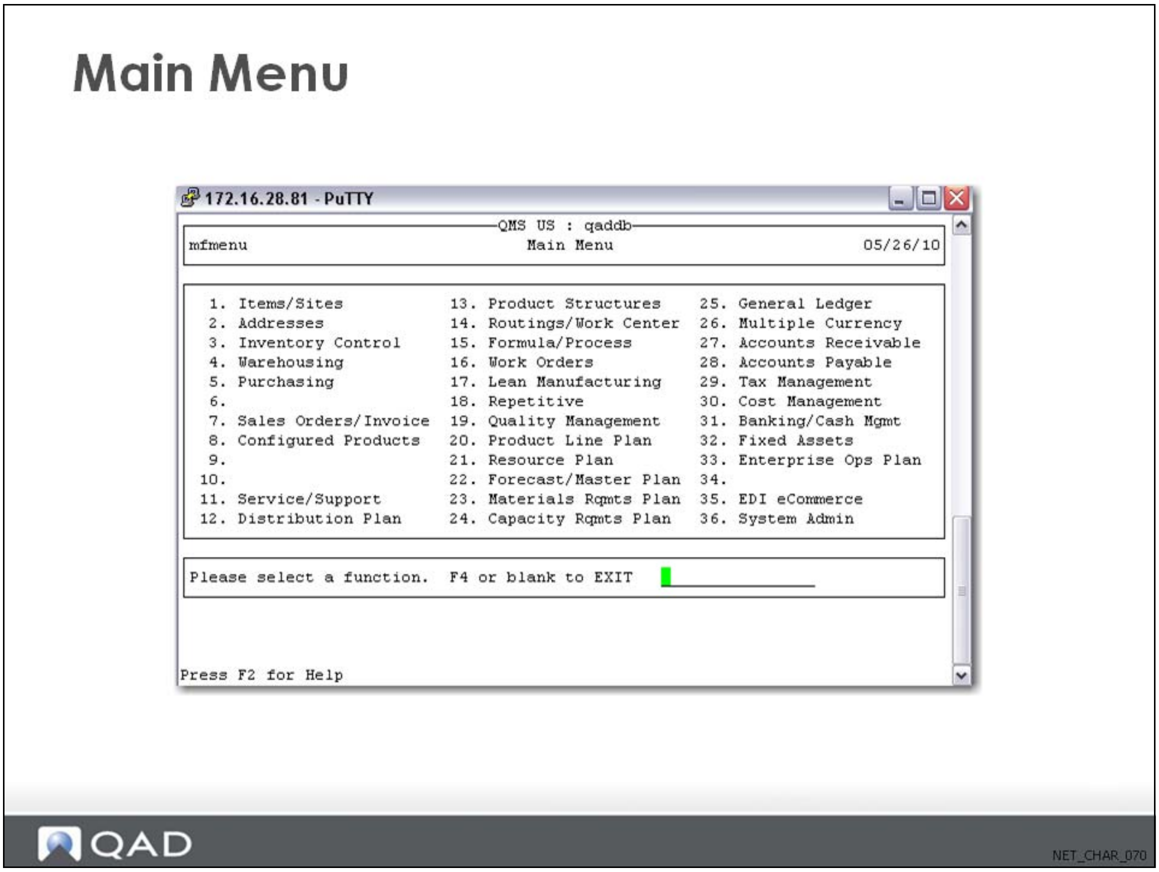


Character UI Login Screen



To start a character session, follow the procedures provided by your system administrator. The first screen you see after launching the system lets you log in to the system. Enter the login ID assigned by your system administrator and your password. If you have been given access to more than one domain in the system, enter its name in the Domain field. If you have access to only one domain, this domain displays in read-only mode. You must be a valid user to log in. Your password can be blank only if the password in your user record is blank.

Main Menu



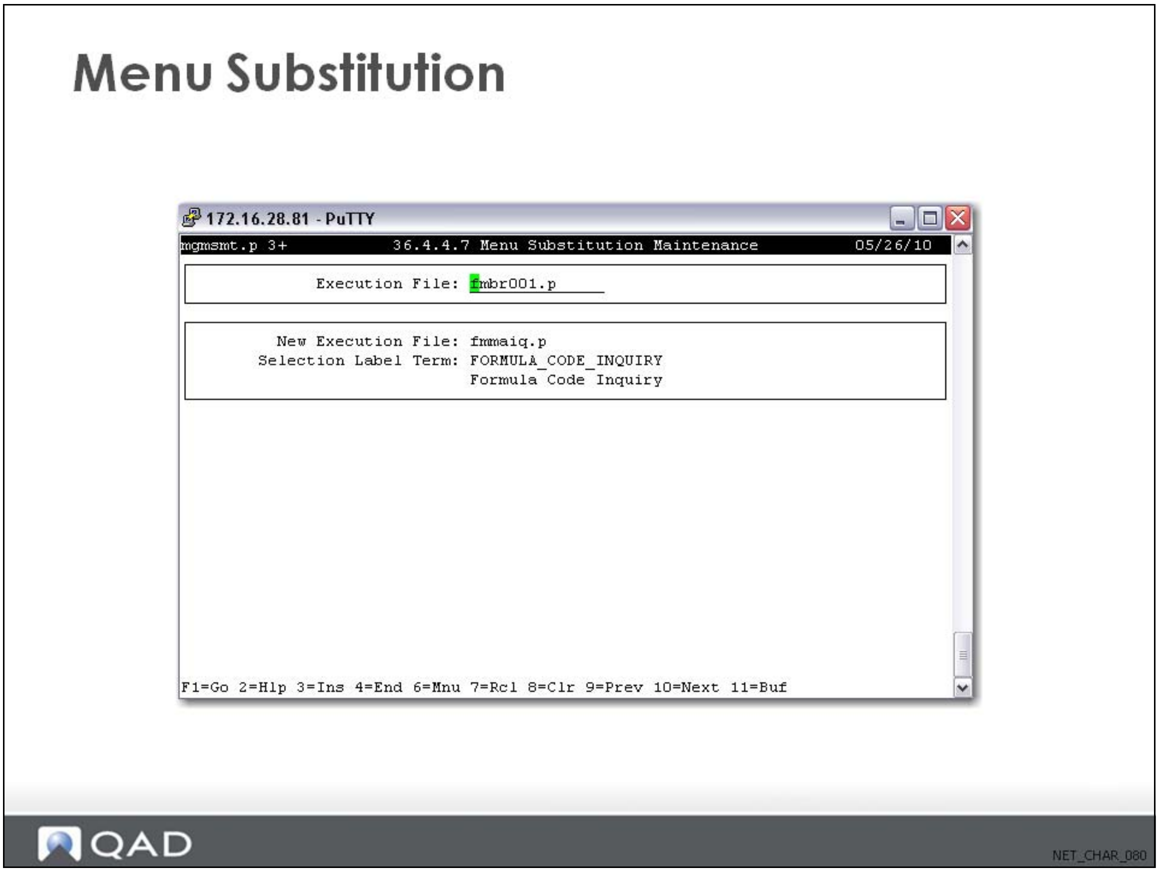
QAD Enterprise Applications has locations for 36 modules on the character-based main menu. In turn, each module has one or more menus attached to it. Menus are lists of programs you use to look up or input data.

The menus that you see depend on the security access that has been granted to your role. Only menus with programs that you have access to display. When you enter a menu number on the command line, the system either executes a program or displays a lower-level menu. You can keep drilling down through the menus until you reach the appropriate level. Alternatively, you can access a program directly by entering its Progress name—such as `ppptmt.p` for Item Master Maintenance—or number at the command prompt.

If the current menu displayed is System Admin (36), you can enter 2.13 to access Generalized Codes Maintenance. However, you must enter .1.4.1 to run Item Master Maintenance (1.4.1) because it is on a different submenu.

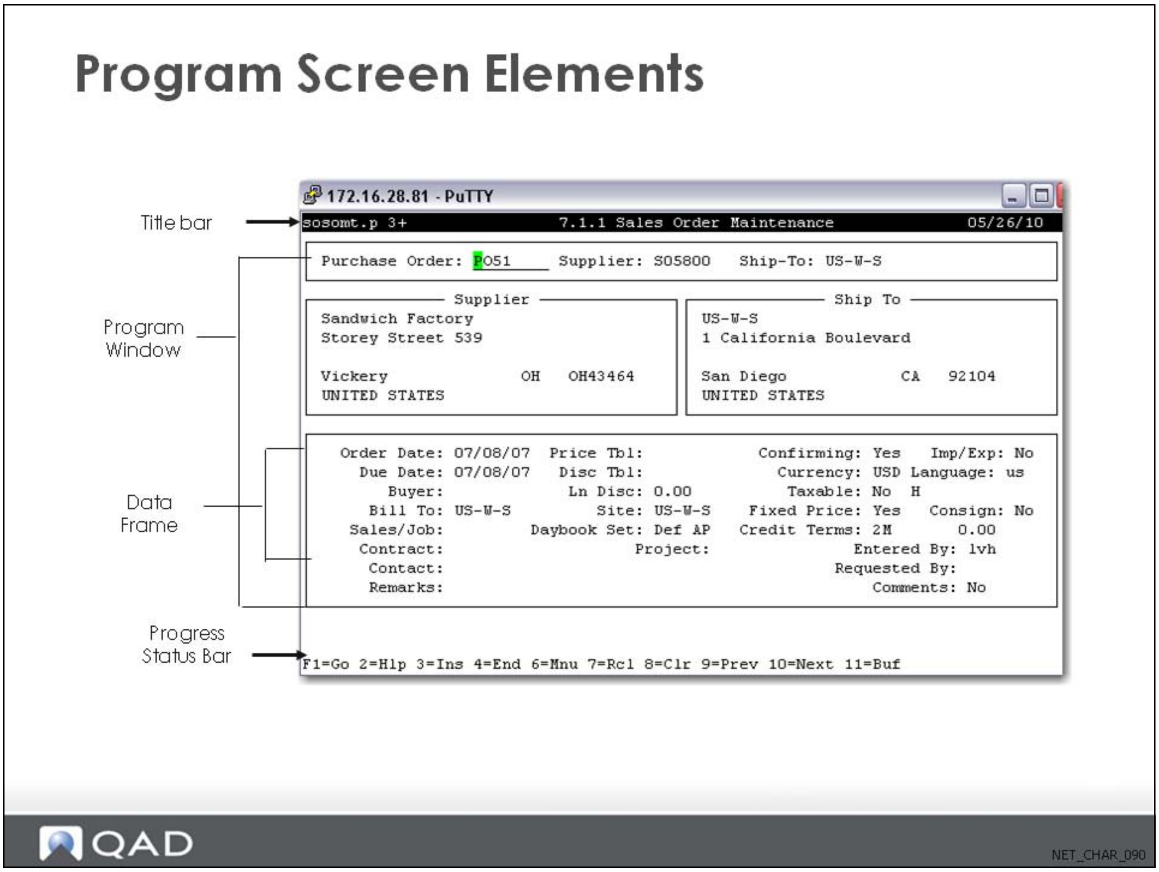
You can also use the arrow keys to move around the menu, then press Enter to execute the highlighted selection.

Menu Substitution



Menu substitution lets you toggle between displaying browses and inquiries on the menu. You can also use it to switch between customized and non-customized versions of a program. The system administrator can use Menu Substitution Maintenance (36.4.4.7 in EE, 36.20.6 in SE) to specify which programs are substituted for others when you select this option. By default menu substitution is disabled. It can be enabled for individual users in User Maintenance (36.3.1).

Program Screen Elements



The title bar identifies the program currently running. What displays in the title bar depends on the Header Display Mode setting in Security Control (36.3.24). Based on that setting, you may see any of the following elements:

- The title bar includes—from left to right—the program name, the version of the program, the menu number and title, and the current date.
- The title bar is the same as previous except that the login ID of the current user replaces the current date.
- The title bar includes—from left to right—the short name and currency of the current working domain, the menu number and title, and the current date.
- The title bar is the same as previous except that the login ID of the current user replaces the current date.

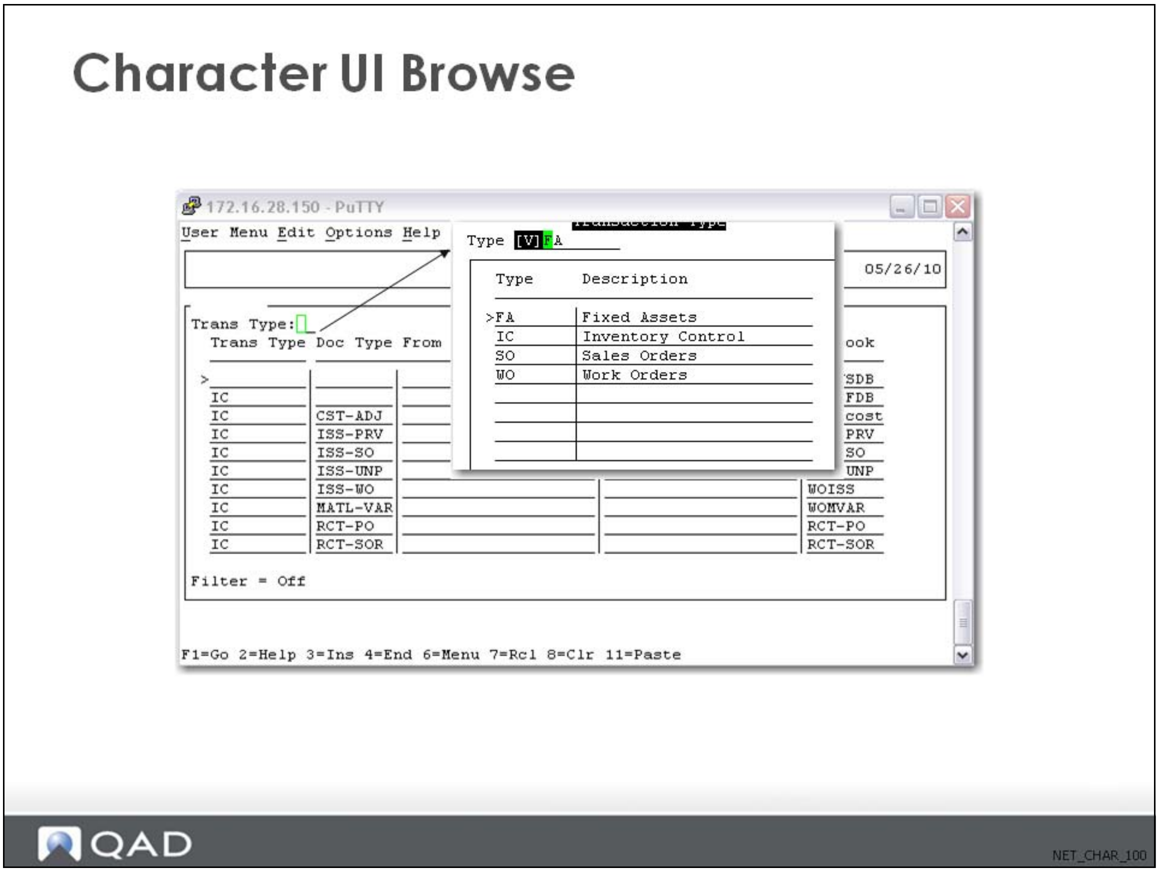
Program Window

- The program window displays the frames and fields of the current program.

Progress Status Bar

- The status bar shows the basic commands needed to navigate through the specific program currently displayed in the program window.

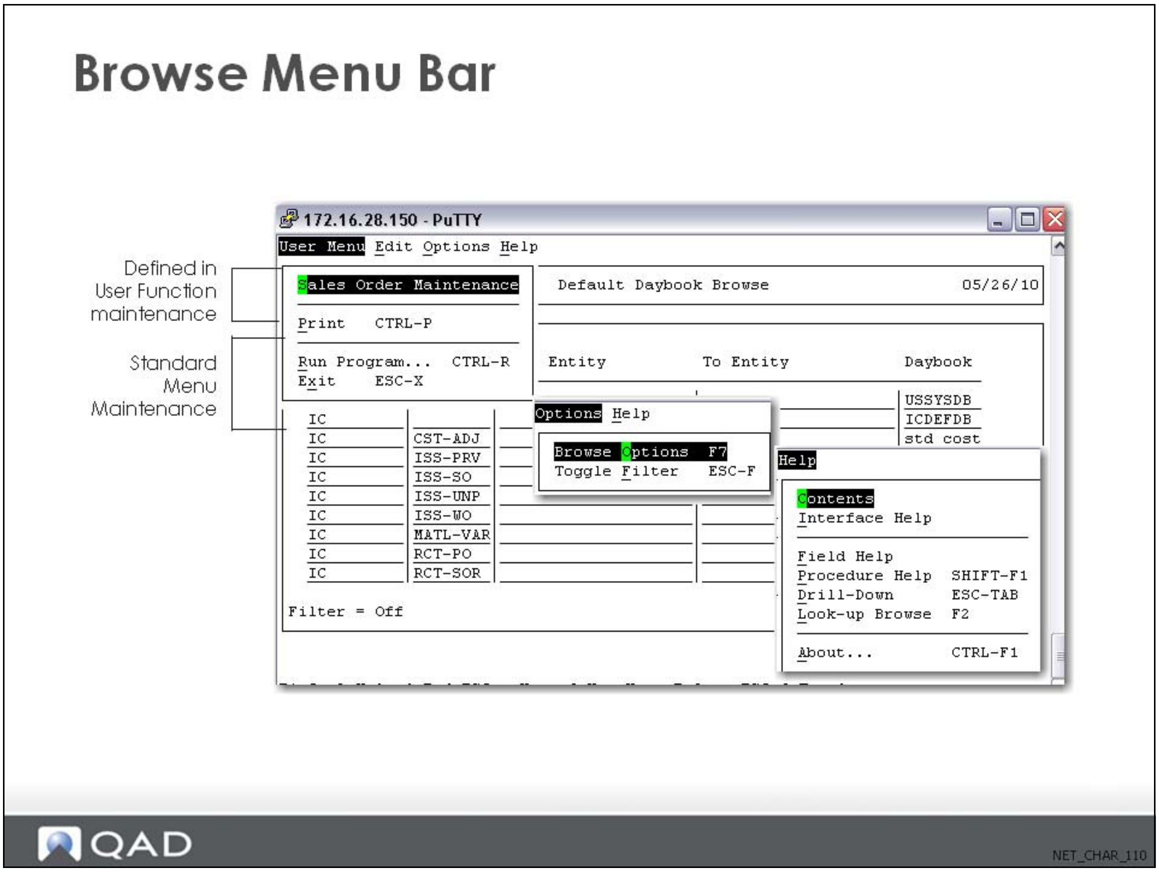
Character UI Browse



Browses display selected data in the form of a table. Browses in the character UI are similar to those in the .NET UI, but have a simpler set of features. Two types of browses are available:

- Lookup browses return the value you select to the active field in the calling program.
- Drill-down browses display, filter, or print data.

Browse Menu Bar



To scroll through the records, use the Up and Down arrows.

The User Menu in the browse menu bar differs from the User Menu accessed by pressing F6. The User Menu in the browse menu bar provides access to:

- Print Options
- Run Program
- Exit

Edit

Cutting text deletes it from its current location and copies it to the clipboard. Copying is similar, but it leaves the original text in place. In both cases, you can paste the text to another location, such as a field.

1. Choose the text to cut or copy.
2. Display the Edit Menu. This menu choice is available only when text is selected.
3. Choose Cut or Copy.
4. Position the cursor in the new location.
5. Choose paste.

Options

- Browse Options. Use this option to set up filter criteria for browses. The filter criteria limit the viewable records according to your specifications. For example, you can filter out product numbers or statuses that you do not want to view.
- Toggle Filter: Use the toggle filter setting to turn on and off the filter criteria set up in the browse filter options.

Help

Use this menu to access help on fields, as well as display drill downs and lookup browses on selected fields. The fastest way to get help for the current field is by pressing F2 twice: press F2 once and, if available, a lookup browse displays) but you can also bring it up with the Help menu. With the cursor in the field, drop down the Help menu and choose Field Help and procedure help.

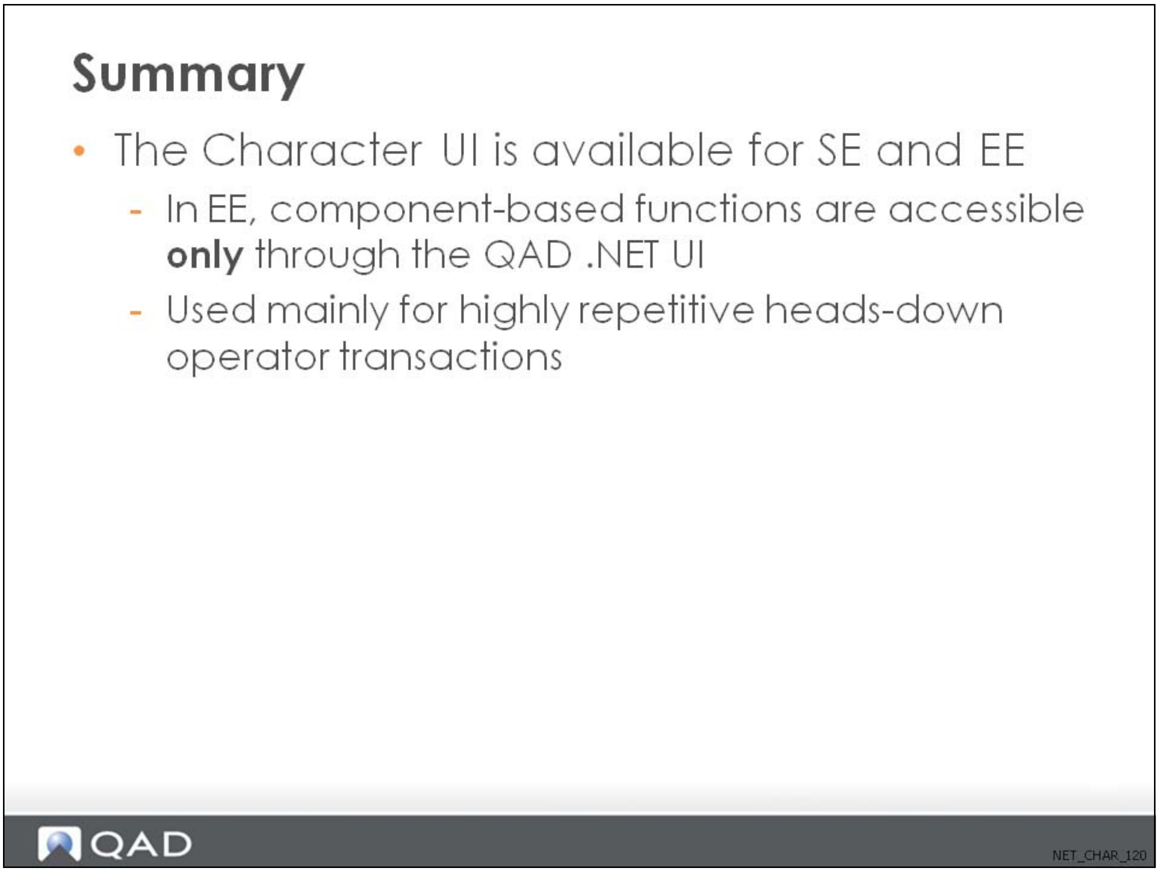
Output Devices

You can send the output from reports, inquiries, and browses to a number of devices, including the following:

- Your terminal
- A server printer
- An e-mail message

However, the character user interface does not offer as many options as the QAD .NET UI. You can send output to Terminal or page, but not to Window. If you select Window, the system displays an error message. The Winprint option is designed only for Windows clients. If you select this option, the system displays an error message. Otherwise, the output options are the same in both interfaces. If you select a printer as the output device, be sure to use one that has been defined with a destination type of Default in Printer Setup Maintenance (36.13.2). Just as in the QAD .NET UI, you cannot use e-mail unless it has been set up properly.

Summary



Exercise

Is the .NET UI or the character version a better option for your company? Why Or why not?

Go to the sold-to field in Sales Order Maintenance and pull up the drill-down browse, field help, and procedure help. What key or keys did you use?

Chapter 7

Dashboards in the QAD .NET UI

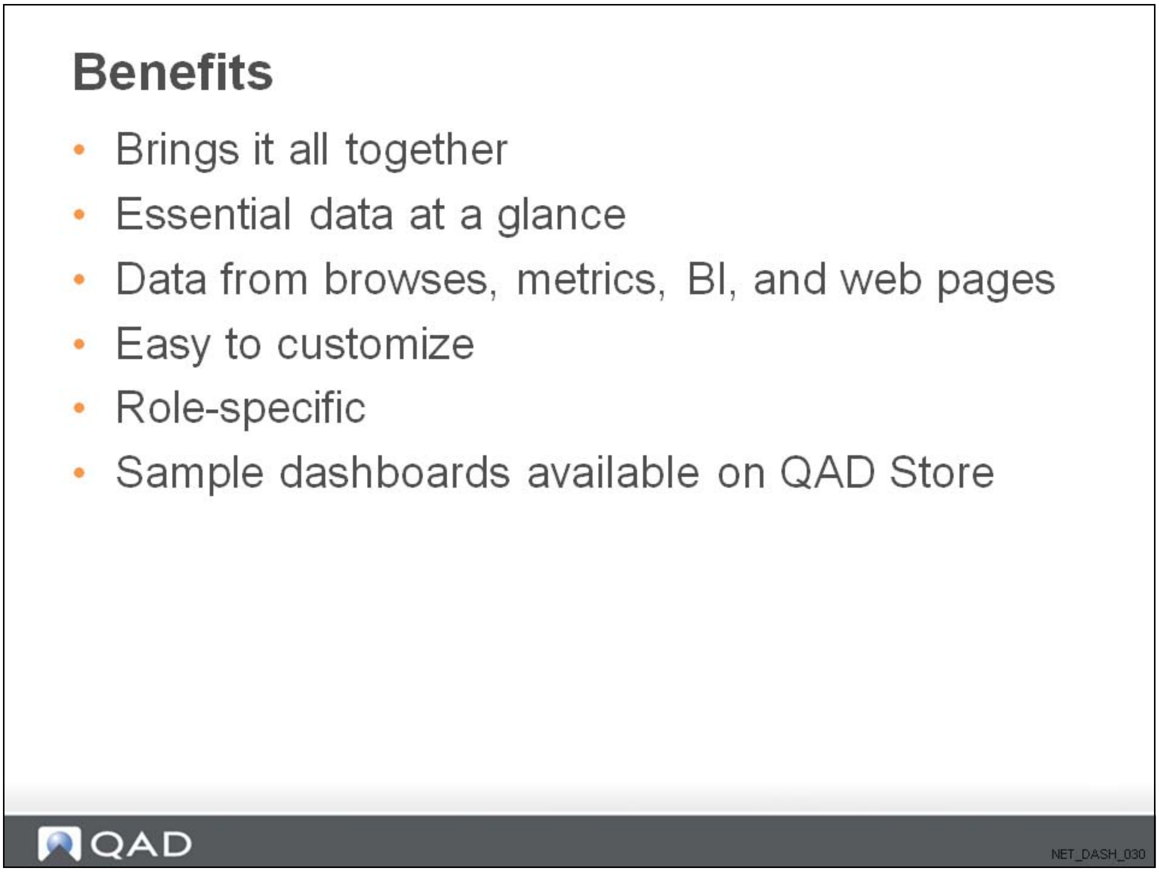
Objective

Objective

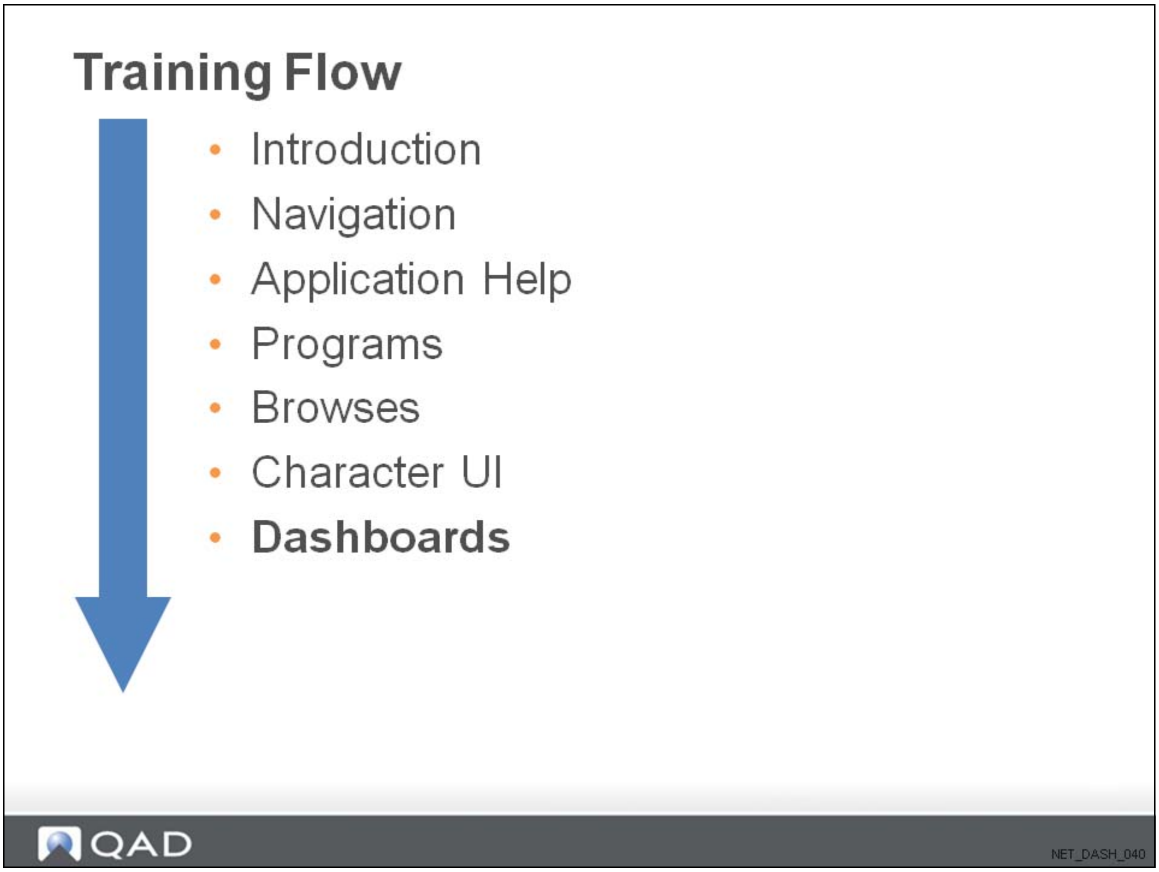
- Learn about dashboards in the QAD .NET UI
  - Benefits
  - Dashboard Example
  - Sample Dashboards
  - Dependencies
  - How to access QAD Dashboards
  - Creating a new dashboard
  - Hands-on dashboards
  - Dashboard configuration

QAD NET_DASH_020

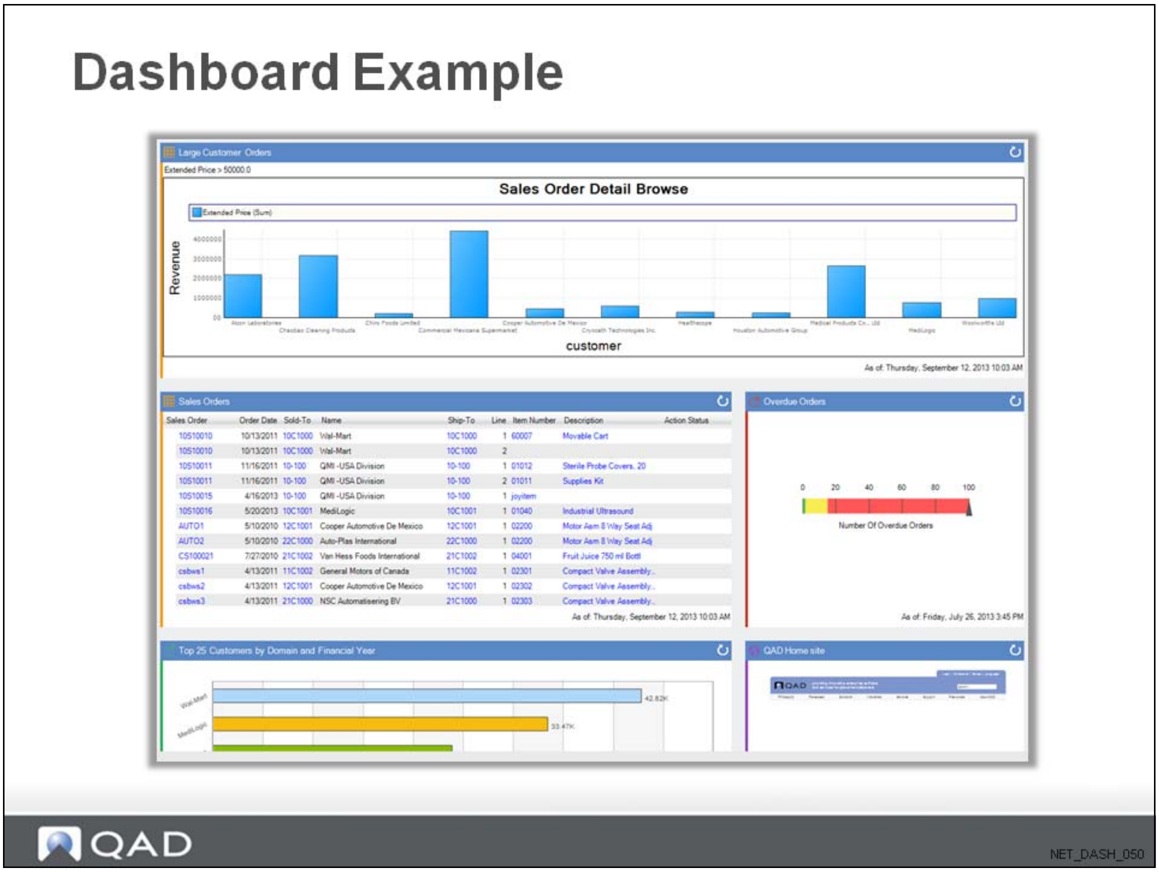
Benefits


Benefits
• Brings it all together
• Essential data at a glance
• Data from browses, metrics, BI, and web pages
• Easy to customize
• Role-specific
• Sample dashboards available on QAD Store
QAD
NET_DASH_030

Training Flow

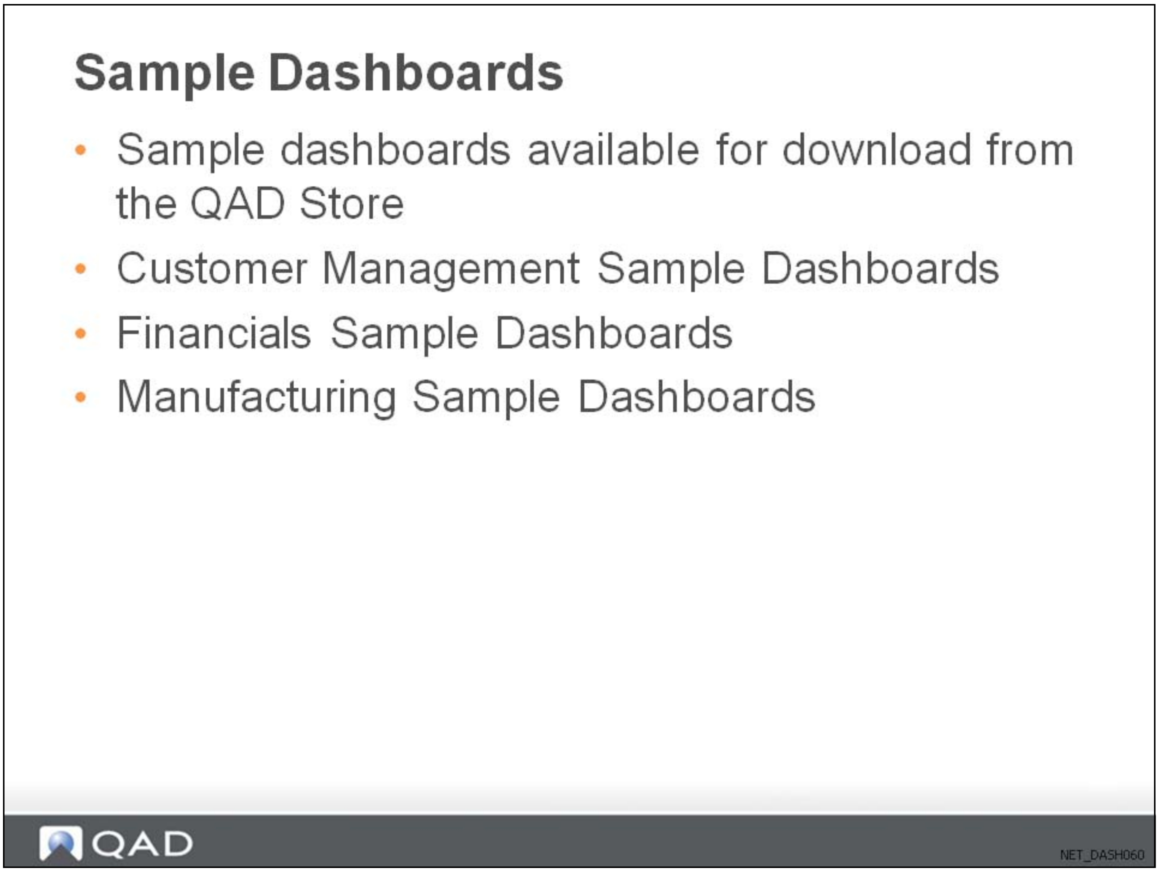


Dashboard Example



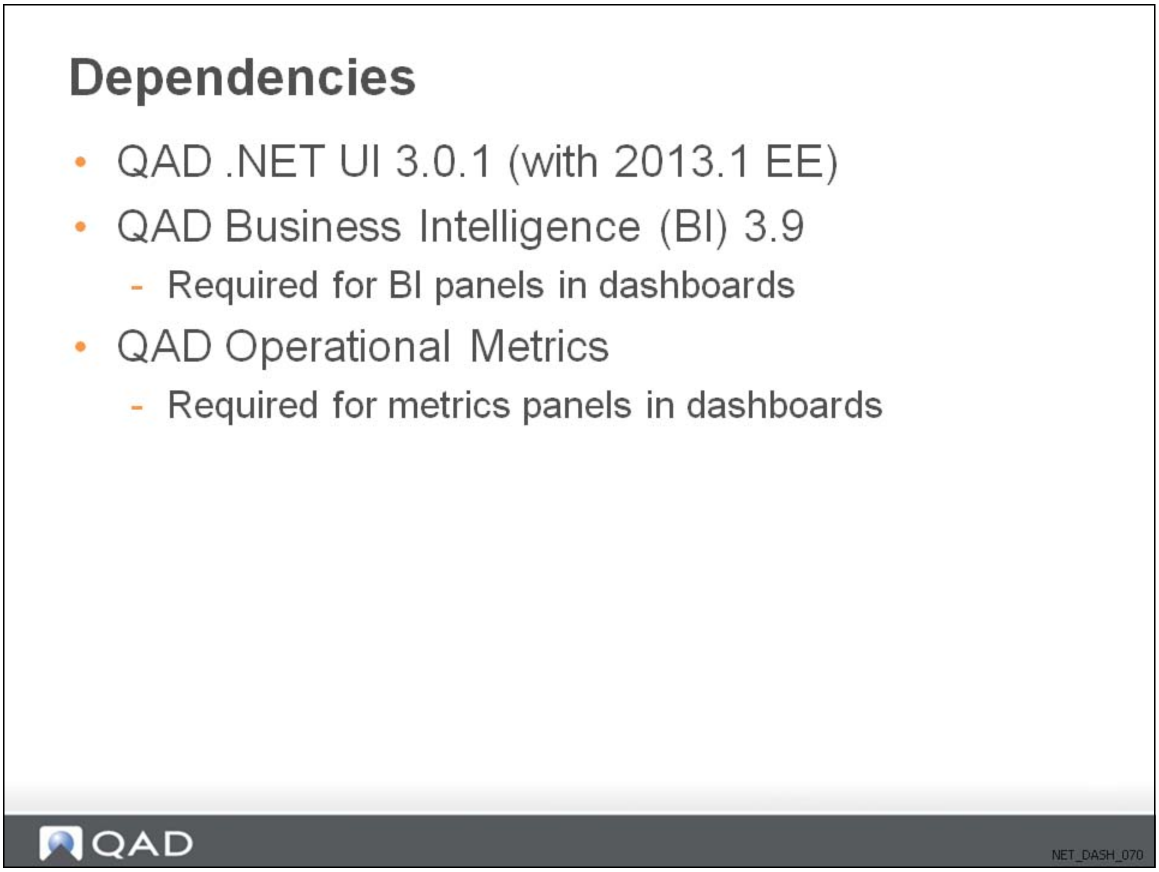
QAD Dashboards bring together browses, web pages, business intelligence, and metrics within panels. For example, this slide shows a dashboard you could create to review Large Customer Orders. The dashboard includes panels that provide information from Sales Order Detail Browse (using a chart view), Sales Order Browse, a Customer Orders metric, a Top 25 Customers by Domain and Financial Year – Business Intelligence (BI) view, and a panel for the QAD web site. Each panel offers a quick summary; to find out more, you click on the panel to open the item, such as a browse, within which you can drill-down further for more detailed information. As a user, you can create, copy, and modify dashboards like this one directly in QAD .NET UI. Further, you can save one or more dashboards as favorites and have them open automatically when you log in to the QAD .NET UI. As an administrative user, you can publish dashboards for use by others and assign them one or more user roles defined in the system.

Sample Dashboards

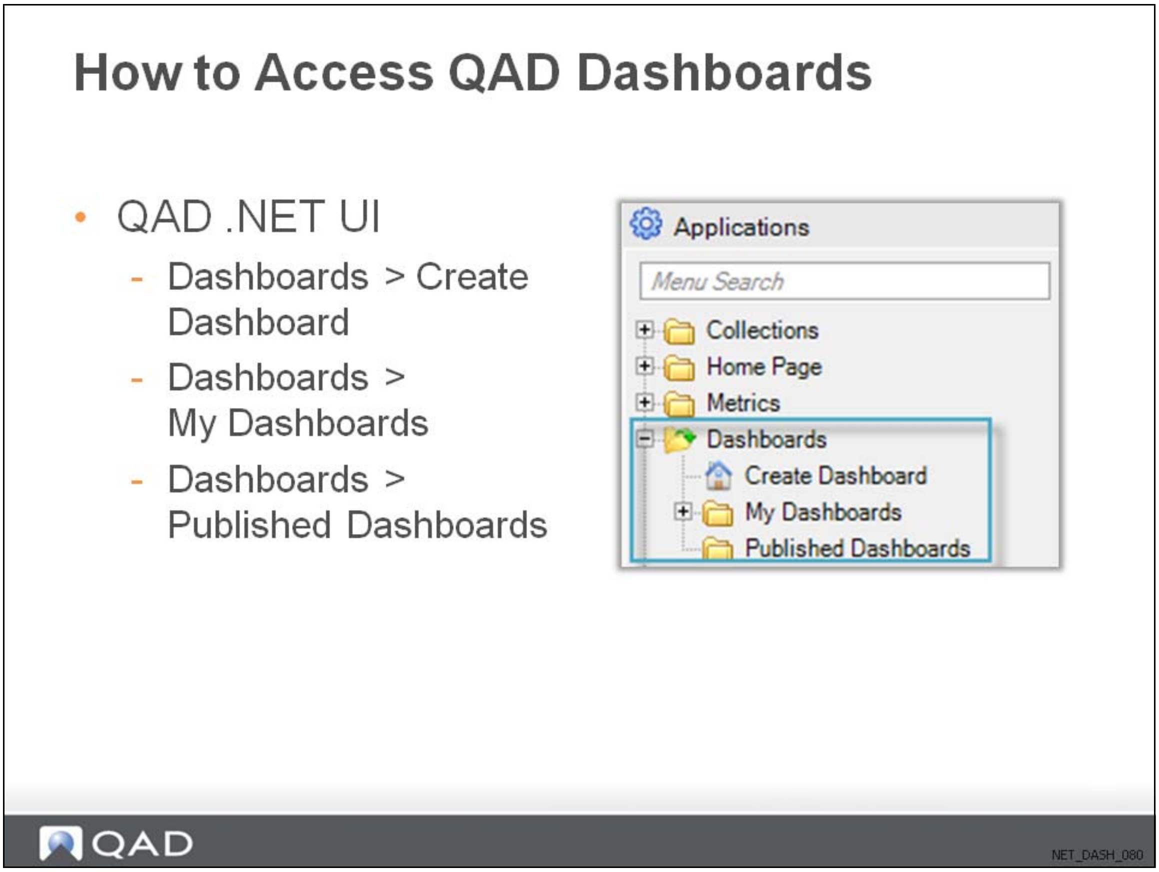


Three packages of sample dashboards (Customer Management, Financials, and Manufacturing) are available for download from the QAD Store. You can copy and customize these sample dashboards to meet your specific requirements.

Dependencies

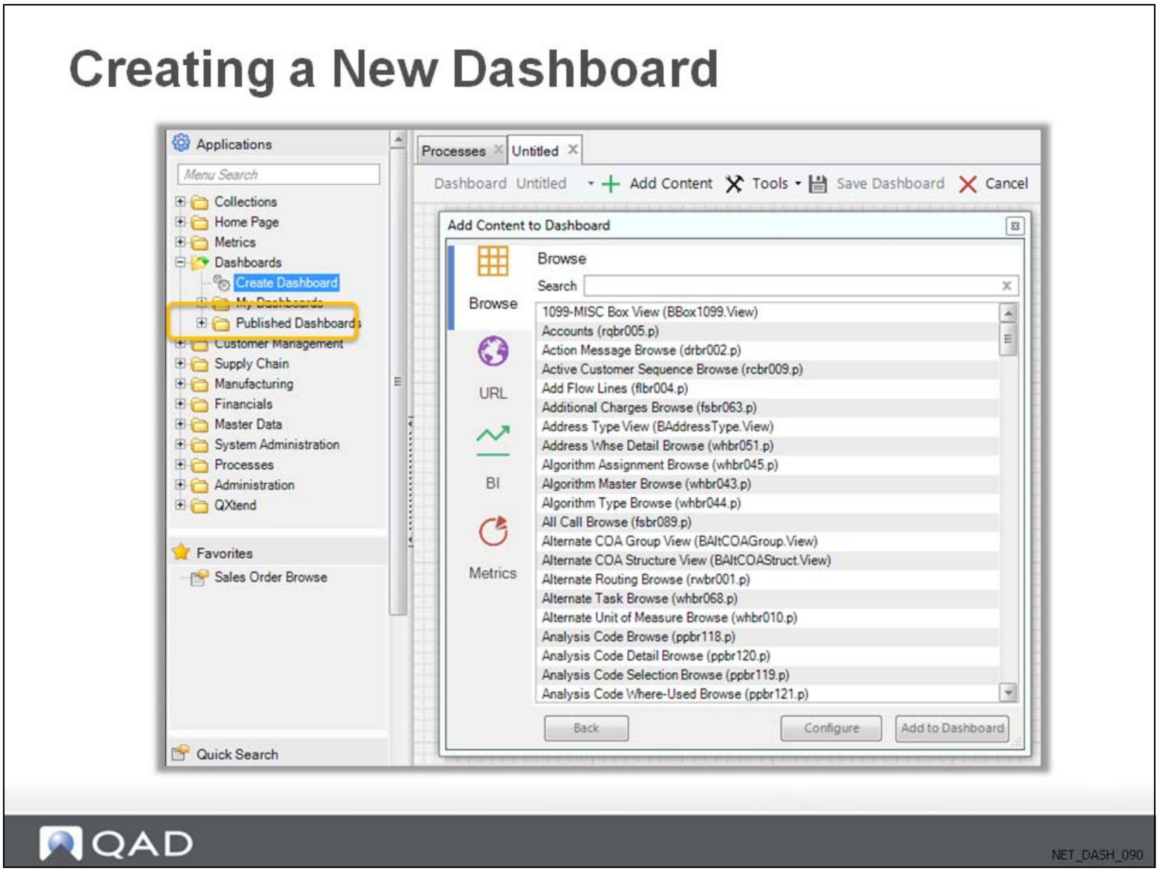


How to Access QAD Dashboards



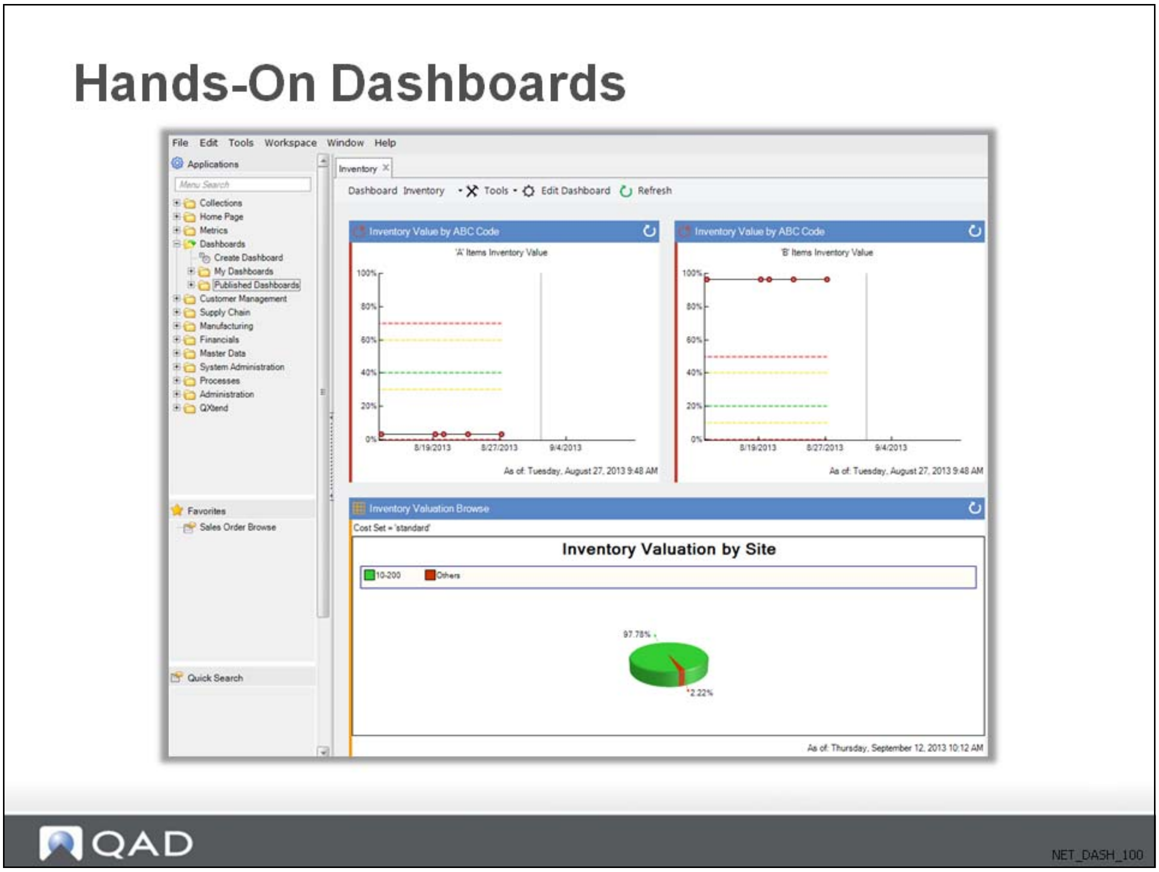
To access QAD Dashboards, in the QAD .NET UI, simply navigate to the Dashboards folder in the Applications pane. In the Dashboards folder, you will see the Create Dashboard selection, with which you can immediately start creating new dashboards. Under Create Dashboard, we have two folders: My Dashboards and Published Dashboards. When you create new dashboards, the dashboards are placed in My Dashboards. When dashboards are made available for your use based on your user role, these dashboards are placed in Published Dashboards.

Creating a New Dashboard



In the QAD .NET UI, to create a new dashboard, you simply click on Create Dashboard and get started with adding Browses, URLs to web pages, BI views, and Metrics. From the Add Content to Dashboard pane, you can select the kind of content you want to have in the various panels of your dashboard. By default, you can add up to 12 panels on a dashboard, but this default can be changed by an administrator. Also, note that you can double or triple the size of browse and metrics panels so that the data is more readily accessible.

Hands-On Dashboards



Now start the QAD .NET UI to explore how to use and customize dashboards.

1 Go to Dashboards > Create Dashboard.(Alternatively open a dashboard and choose Tools > New.)

2 Let's add a browse panel. In the Add Content to Dashboard window,

3 Click Browse

4 Search for a browse of interest, such as Sales Orders (sobr103.p).

5 Set Price to be greater than 10,000.

6 Change Title to: Sales Orders Over 10K.

7 Preview the browse results.

8 Click Add to Dashboard.

Next, let's add a metric panel.

1 Click Add Content.

2 Click Metric.

3 Search for a metric of interest. For example, choose Sales Orders.

4 Click Configure.

5 Click Metric Gauge.

6 Click Past Due Orders.

7 Click Add to Dashboard.

Now save the dashboard:

1 Click Save Dashboard.

2 In the Save dialog, enter a name for the dashboard. You can enter text here but I recommend that you first check to see if a label is available that would be applicable. By using an available label instead of text, you can be sure that the title of the dashboard will be translated. For this example, let's use the label ${SAMPLE}, which will display in English as "Sample".

3 When done, click Save Dashboard.

Now, looking back at the Applications pane, under My Dashboards, note that the new dashboard you've just created is located under My Dashboards. However, it is not located under Published Dashboards.

Edit the new dashboard further:

1 Open the dashboard and click Edit Dashboard. Notice how when you are in edit mode a light gray grid is displayed in the background. This is to help remind you that you are in edit mode.

2 Now let's consider the icons near the lower left corners of our panels. You can double or triple the width of browse panels and metrics panels.

3 Click on the triple-width icon for the browse panel. Note how the browse panel triples in width and then the metrics panel automatically moves below the browse panel for you.

4 Click Save Dashboard. (Notice the light gray grid is no longer displayed when you are not in "edit mode".)

Add some more panels to the dashboard. (By default, we can add up to twelve panels but that limit can be changed by an administrator.)

1 Open the dashboard and click Edit Dashboard.

2 In the Add Content to Dashboard window, click URL.

3 In the Title field, enter Google.

4 In the URL field, enter a URL to a web page. For example, www.google.com. Note that QAD Shell Links (qadsh://) links are not currently supported for use in the URL field.

5 Click Preview to verify the view of the web page.

6 Click Add to Dashboard.

7 Click Save Dashboard.

You can change the configuration of the panels on the dashboard. To see how, edit the dashboard. Notice the icons along the upper right corner of each panel. There are three of them: a gear, a circular arrow, and an X. The gear is for editing the panel configuration, the circular arrow is for refreshing the panel display, and the X is for deleting the panel.

On the URL panel, click on the gear icon and change the URL from www.google.com to maps.google.com.

Similarly, you can change the configuration of browses, metrics, and so on. For example, you could change the search filters on a browse display panel.

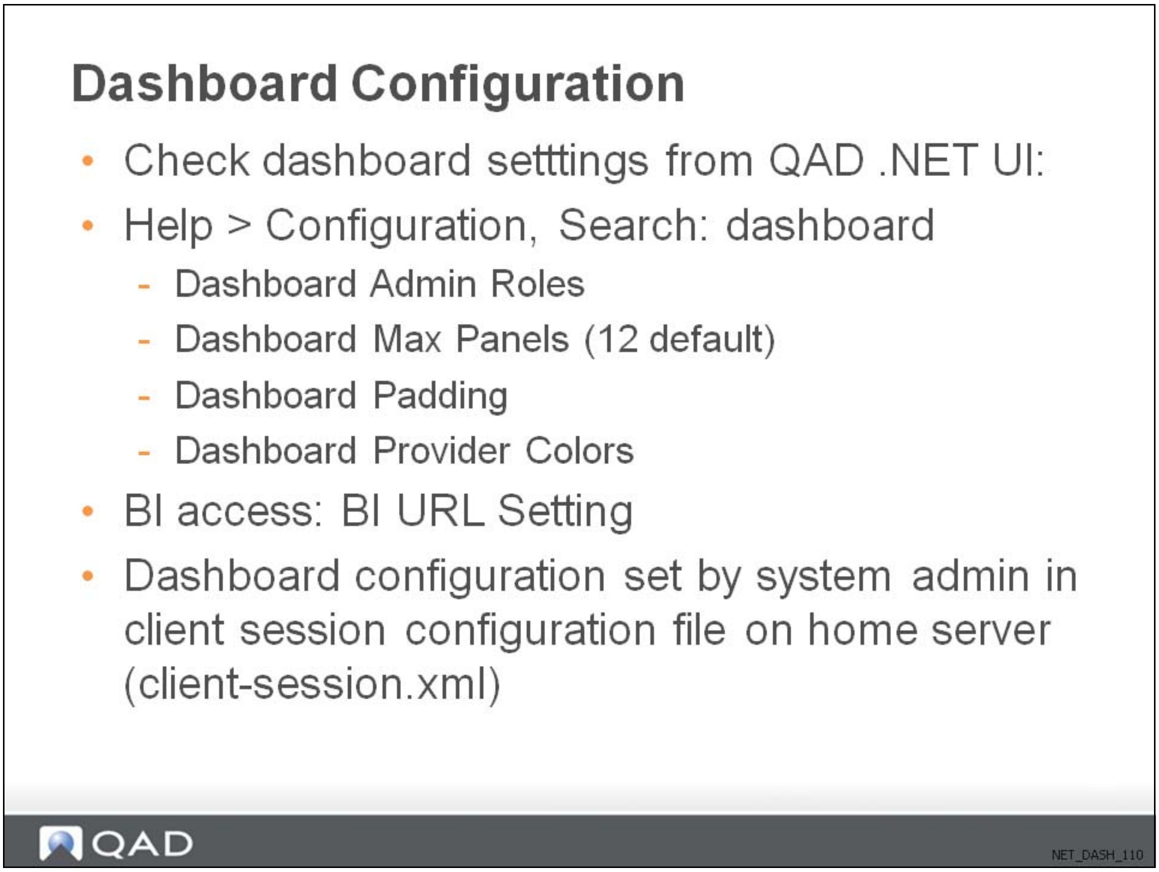
Take a look at the dashboard tools options.

1. From the dashboard, select Tools.
2. From Tools, you can start a new dashboard, make a copy of the dashboard (which you can then edit and customize), rename the dashboard (that is, give it a new title), and delete the dashboard.
3. Next, under Tools, if you are an administrator, you will have a Publish option. When you publish a dashboard, you have options to rename the dashboard and to assign the dashboard to user roles previously defined in the system.
4. Finally, under Tools, note the Export and Import options. With these options, you can export the dashboard definition as an .xml file and then import the .xml file to another system.

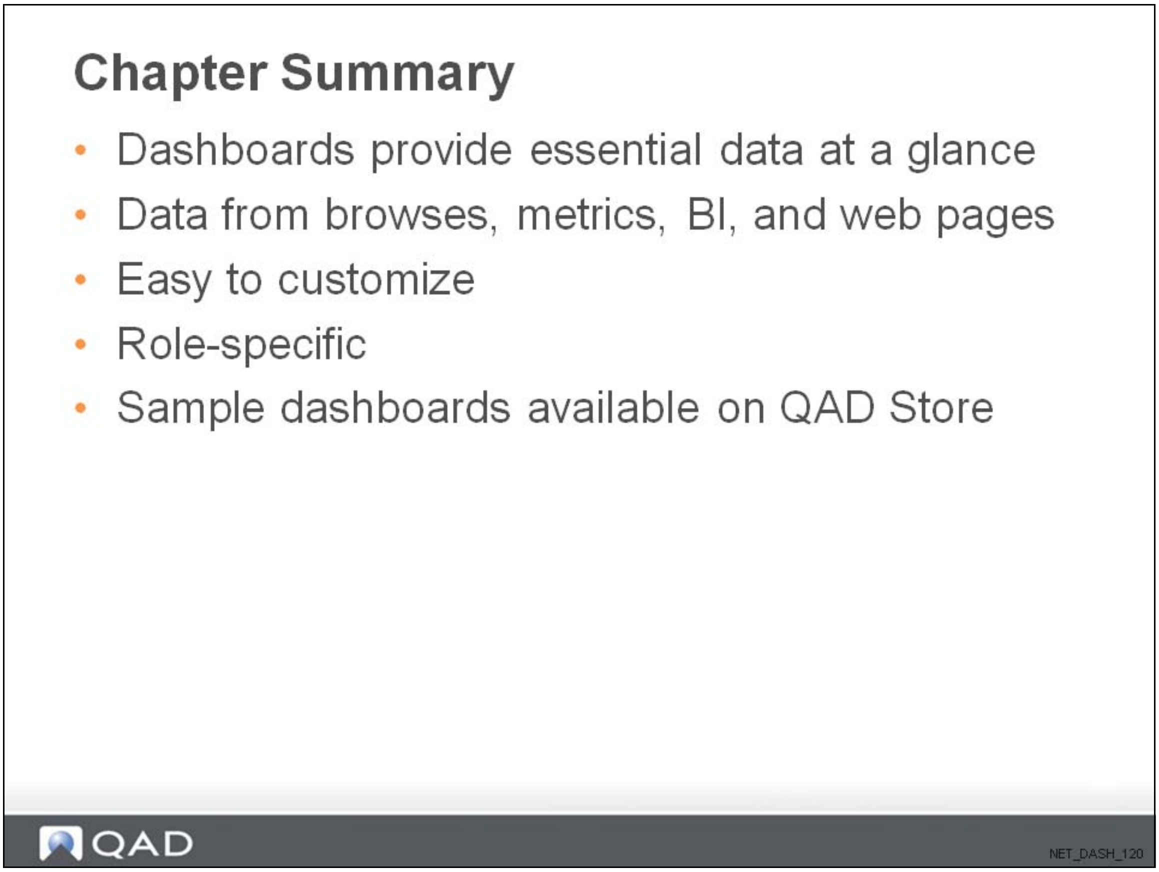
You can add a dashboard as a favorite and then set that favorite to auto-start so that it opens automatically when you log in. For instance:

1. In the Applications pane, right click on the Sample dashboard.
2. Choose Add To Favorites.
3. Under Favorites, right-click on Samples and choose Auto Start.
4. Now this dashboard will open automatically when you log in to the UI again.

Dashboard Configuration



Summary


Chapter Summary
Dashboards provide essential data at a glance
Data from browses, metrics, BI, and web pages
Easy to customize
Role-specific
Sample dashboards available on QAD Store
QAD
NET_DASH_120

Exercise and Knowledge Check

1 With QAD Dashboards, can all of the following be included in dashboard panels?
- Browses
- Operational Metrics
- Business Intelligence (BI)
- Web Pages

2 When you create a new dashboard, where is the dashboard saved on the QAD .NET UI menu

3 What is the maximum number of panels you can have on a dashboard by default?

4 Can you double or triple the width of a browse panel?

5 Can dashboards be assigned to user roles in the system?