User Guide

QAD QXtend Excelerator

QAD QXtend Excelerator Overview
Implementing QAD QXtend Excelerator
Using QAD QXtend Excelerator

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Contents

About This Guide

What Is in This Guide?

Use this guide to configure and use QAD QXtend Excelerator, which is an optional data integration tool within the QAD QXtend interoperability framework that provides additional data visibility and manageability to the data integration process between QAD products.

For information about QAD QXtend, see *User Guide: QAD QXtend*.

Audience

This guide is intended for developers who design data integration worksheets and configure QAD QXtend Excelerator settings, as well as end users who perform actual data integration activities, including retrieving data from the source QAD application, editing data in the data integration worksheet, and synchronizing data with the target QAD application.

The developer should be familiar with the QAD Enterprise Applications and QXtend configurations. The user should have experience working with Microsoft Excel worksheets.

If you do not have this expertise within your company, contact QAD Support for information on the customization offerings supplied by QAD's Global Services.

Related Documentation

QAD QXtend Documentation

QAD QXtend Excelerator is designed to be used in conjunction with QAD QXtend to streamline the data integration and communication process.

- For instructions on installing QAD QXtend, see *Installation Guide: QAD QXtend*.
- For information on configuring and using QAD QXtend, see *User Guide: QAD QXtend*.

Other Documentation

QAD QXtend Excelerator is designed to interoperate with QAD Enterprise Applications.

For information on installing QAD Enterprise Applications or converting to a more recent release, refer to the appropriate installation guide for your system or the appropriate QAD Enterprise Applications conversion guide.

For information on using the various modules of QAD Enterprise Applications, refer to the user guides for your version.

For users with a QAD Web account, product documentation is available for viewing or downloading from the QAD Online Support Center at:

http://support.qad.com/

You can register for a QAD Web account by accessing the Web site. Your customer ID number is required. Access to certain areas is dependent on the type of agreement you have with QAD.

Most user documentation is available in two formats:

- Portable document format (PDF) files can be downloaded from the QAD Web site to your computer. You can view and print them with the free Adobe Acrobat Reader.
- HTML files let you view user documentation through your Web browser and use search tools for easily locating topics of interest.

Features of the Web site include an online solution database to help you answer questions about setting up and using the product. Additionally, the QAD Web site has information about training classes and other services that can help you learn about QXO and MFG/PRO.

Conventions

Menu References

This guide applies to all releases of QAD Enterprise Applications from eB through to the current release (QAD EE and QAD SE). Several menus have been reorganized between these releases. Differences in menu numbers are noted, when necessary, using the following convention:

User Tool Maintenance (36.20.4; 36.20.2 in eB)

The initial menu number identifies the program in the most recent release. The second menu number applies to the release specified and all earlier releases.

Typographic Conventions

This document uses the conventions listed in the following table.

If you see:	It means:
`monospaced text`	A command, path, or file name.
`italicized monospaced text`	A variable name for a value you enter as part of an operating system command; for example, *`YourCDROMDir`*.
`<`*`italicized monospaced text`*`>`	A variable for a system value such as a drive letter or machine name; for example `<`*`hostmachine`*`>`.
`indented command line`	A long command that you enter as one line, although it appears in the text as two lines.
Note	Alerts the reader to exceptions or special conditions.
Important	Alerts the reader to critical information.
Warning	Used in situations where you can overwrite or corrupt data, unless you follow the instructions.

QAD Support Services

To take full advantage of the flexibility and potential of QAD's interoperability framework in your specific environment, contact your QAD Support representative for information on the installation and customization offerings supplied by QAD Support Services. These offerings include performance enhancements as well as technical and administration training. For details, contact your nearest QAD office, or go to the QAD Web site and click the Global Services link.

Chapter 1

QAD QXtend Excelerator Overview

This section provides an overview of QAD QXtend Excelerator.

Introduction

QAD QXtend Excelerator is an optional data integration tool within the QAD QXtend interoperability framework that provides additional data visibility and manageability to the data integration process between QAD products. The Excelerator is seamlessly integrated with Microsoft Excel 2007 as a document-level customization. The tool provides functions for easily designing spreadsheets for retrieving data from the source QAD application, viewing and modifying data in the spreadsheets, and synchronizing data with the target QAD application, all in a familiar and intuitive user interface.

QAD QXtend Excelerator is used in conjunction with QXtend Inbound and Outbound, which must be properly implemented before you can use this tool.

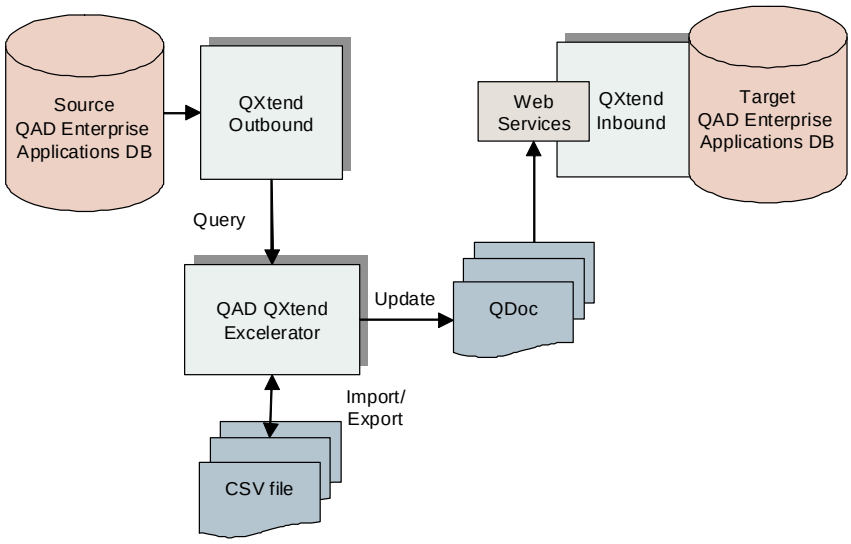
Excel spreadsheets can be configured by downloading and importing QXtend API schema from a QXtend Inbound instance. You can simplify data entry by hiding tables and columns from the API and saving the spreadsheets.

To prepare data to load into QAD Enterprise Applications, you can import data into Excel spreadsheets from three data sources—manual data entry, CSV files, and the Query Service in QXtend Outbound.

You can then use the tool to update data to the target QAD application through QXtend Inbound. You select a QXtend instance and receiver to receive the data and can specify whether to use SSL to call the QXtend Web service. The system performs authentication when processing records using the QXtend Web service, and you can stop and restart the load process. If errors occur during the load process, the tool will display errors and highlight records with errors, and you can reprocess failed records. This data integration tool supports all QAD products that expose APIs through QXtend Inbound.

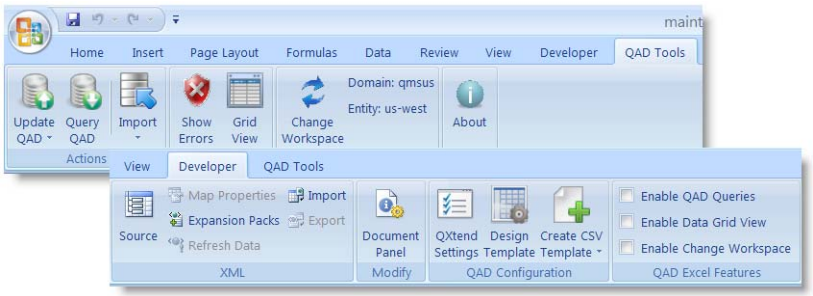
When you save a spreadsheet, its state is also saved; for example, if you have 10 errors when you save and close the file, you will still have these 10 errors when you reopen the file.

Fig. 1.1
QAD QXtend Excelerator



QAD QXtend Excelerator dovetails into the Microsoft Excel user interface, and you access all of its features the same way you use Excel features. The tool's configuration settings are grouped under the Developer tab in the Ribbon, and all of its data integration features are grouped under the QAD Tools tab. You can enable/disable some of its data integration features as needed.

Fig. 1.2
QAD QXtend Excelerator Menus

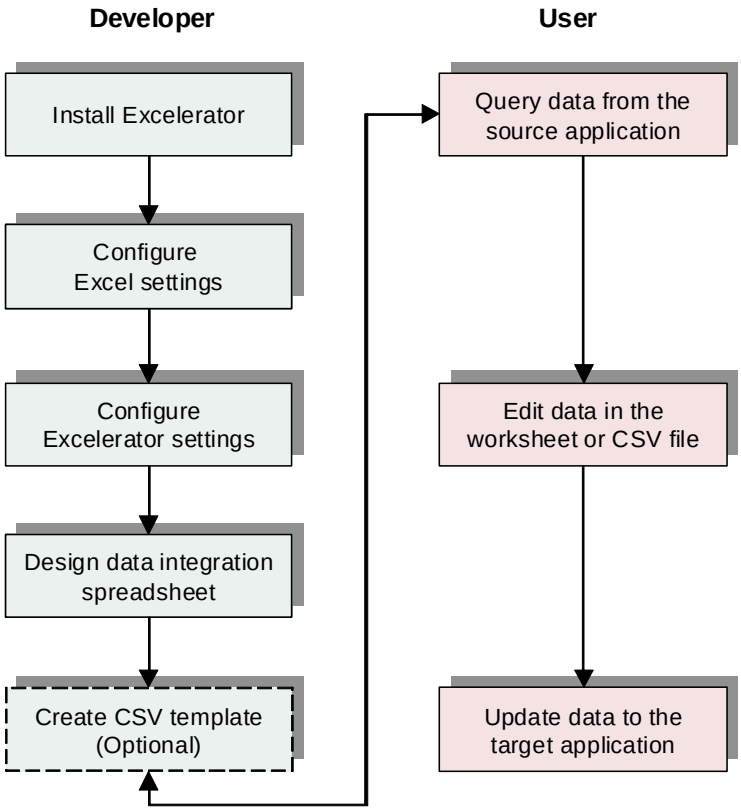


A free trial version of QAD QXtend Excelerator ships with QAD QXtend for initial data load and go-live implementation. However, further use of this tool for data integration and communication on a day-to-day basis requires a separate license. Contact QAD Services for information on purchasing licenses for QAD QXtend Excelerator.

Data Integration Process Map

The following diagram illustrates the basic data integration workflow using Excelerator.

Fig. 1.3
Data Integration Process Map



Chapter 2

Implementing QAD QXtend Excelerator

This section provides detailed instructions for developers on setting up QAD QXtend Excelerator for data integration.

Overview

This section assumes that you are a developer familiar with QXtend configurations. Before QAD QXtend Excelerator can be used to perform data integration and communication between QAD products, you must use the following general tasks to set up the tool:

- Installing QAD QXtend Excelerator and Prerequisite Components
- Configuring Excel Settings
- Configuring QAD QXtend Excelerator Settings
- Designing Data Integration Spreadsheets

Installing QAD QXtend Excelerator and Prerequisite Components

1. Make sure that the following prerequisites are met before you implement QAD QXtend Excelerator on your client machine:
   - The operating system on the client machine must be Windows XP.
   - Microsoft Excel 2007 is installed on the client.
   - QXtend Inbound and Outbound (version 1.6.3 and later) have already been properly installed and configured to successfully communicate data between source and target QAD applications.
2. From the installation media, execute `setup.exe` to install the QXtend Excelerator workbook and all prerequisite components—Microsoft .NET Framework 3.5 SP1, Microsoft Office 2007 Primary Interop Assemblies, and Visual Studio Tools for the Office System 3.0 Runtime Service Pack 1. Follow the on-screen instructions to complete the setup.
3. When setup is complete, you can find a `QXtendWorkbook.xlsx` file in your `My Documents\QAD\QAD QXtend Workbook` folder. This file serves as a template, so do not directly use this file but rather create new working Excel files from the file for data integration.

   A default `QXtendWorkbookConfig.xml` file is also deployed to the `My Documents\QAD\QAD QXtend Workbook` folder. The file contains the global QXtend Excelerator settings that are set in the QXtend Excelerator Settings window. When the Excelerator is launched, the configuration details (Qxtend Location, Update Receiver, QAD Application Settings) are loaded from the `QXtendWorkbookConfig.xml` file. The tool searches the following locations in order of preference when loading the configuration:
   - Local directory where the spreadsheet was opened from.
   - The `config` subdirectory under the local directory where the spreadsheet was opened from.
   - Your ClickOnce cache directory. The ClickOnce cache is where required DLLs are installed to. The location is a subdirectory under your `Local Settings\Apps\2.0` directory.
   - The `config` directory under the ClickOnce cache.

This mechanism allows you to decide whether or not to bundle the configuration file with the set of spreadsheets you will be working with. If the configuration file is not exposed in the local directory where the spreadsheets live, the settings will be stored in your ClickOnce cache. The administrator can then restrict access to the cache directory, which would restrict a user from tampering with the QXtend settings.

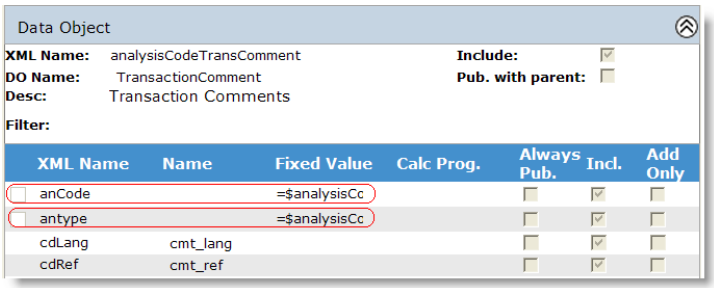
Setting Up QXtend Outbound Query Service

In order to use the data query function in Excelerator to retrieve data from the source QAD Enterprise Applications, you must first set up the query service as well as configure QDoc APIs in QXtend Outbound. Perform the following steps in QXtend Outbound.

Note For details on setting up the query service, modifying query profiles, and configuring and deploying QDoc APIs, see *User Guide: QAD QXtend*.

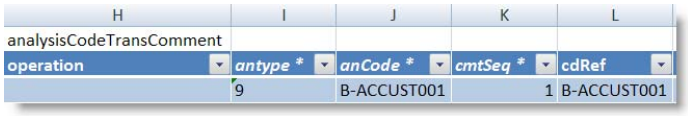
1. Set up the query service.
2. Configure corresponding QDoc APIs.
   - If you are working with standard QDoc APIs, some already have corresponding synchronization profiles defined in QXtend Outbound, so you do not need to do anything for them; for example, for the maintainCustomer QDoc API, there is a corresponding profile called MaintainCustomerData already defined in QXtend Outbound.
   - If the QDoc API being used does not contain the default profile, define the required profile in QXtend Outbound.
   - Customize profiles as needed. Depending on the QDoc API you are using, in some cases, further configuring of the profiles for use with Excelerator may be required. For example, when querying data containing transaction comments, the foreign key fields need to be defined in the transaction comments object. In the case of Analysis Code Master, the following fields have been added to the Transaction Comments object:
     - anCode contains a fixed value of “=$analysisCode.anCode$”
     - antype contains a fixed value of “=$analysisCode.antype$”

Fig. 2.1
Customizing Profiles



This type of assignment uses the fixed value expressions functionality available in QXtend. In this example, the value is replaced by the value in the parent record. This is required because the foreign key definition in the maintainAnalysisCode schema references these values when linking the child transaction comments data to the parent analysis code record.

Fig. 2.2
Reference Example



H	I	J	K	L
analysisCodeTransComment				
operation	antype *	anCode *	cmtSeq *	cdRef
	9	B-ACCUST001	1	B-ACCUST001

The standard replication profiles supplied with QXtend Outbound already include this field assignment when dealing with Transaction Comments data. When designing profiles for use with the Excelerator worksheets, it is important to ensure that this type of field assignment is included in the definition.

3 To expose the query profiles to the spreadsheet, use the Deploy Query button to publish any newly created or modified query profile definitions to QXtend Inbound. This allows QXtend Outbound to accept query requests for the published profiles.

Setting Up Authentication for Query QAD Requests

Query QAD works for all QAD Enterprise Applications versions QAD supports, but Query QAD requests are only authenticated for 2009 and later releases of QAD EE and QAD SE.

To enable this functionality, you must configure a connection pool of type SIAPI in QXtend Outbound, and the name of the connection pool must be same as the Update Receiver specified in the Excelerator Settings panel.

For details on configuring connection pools, see *User Guide: QAD QXtend*.

Configuring Excel Settings

Use the following to configure Excel settings. You only need to perform this once on your machine.

1 Create a working Excel file by making a copy of the `QXtendWorkbook.xlsx` template file located in the `My Documents\QAD\QXtendWorkbook` folder. You can rename the new file as you want.

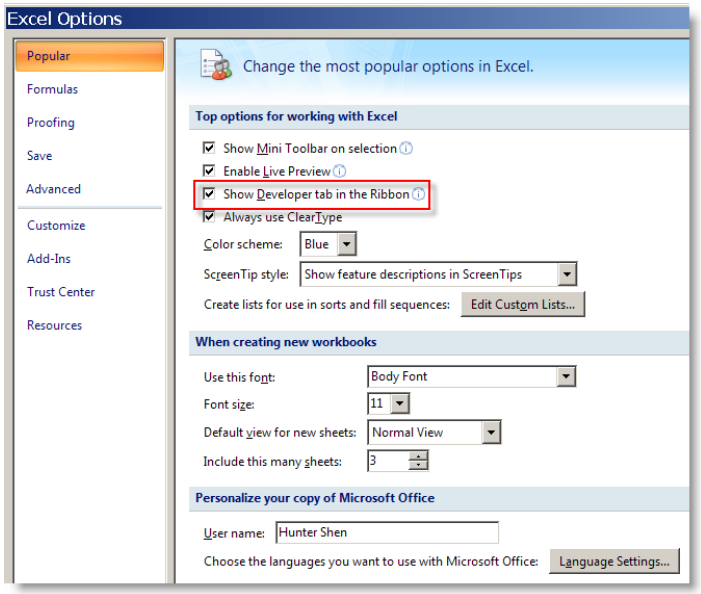
2 Open the working Excel file.

3 Click the Microsoft Office Button and then click Excel Options.

4 Click Popular, and then select **Show Developer tab in the Ribbon** under T**op options for working with Excel**. The Developer tab contains configuration options for QAD QXtend Excelerator, so you must display it to access these settings.

Note The Developer tab should only be displayed if the user will be required to access the developer's functions.

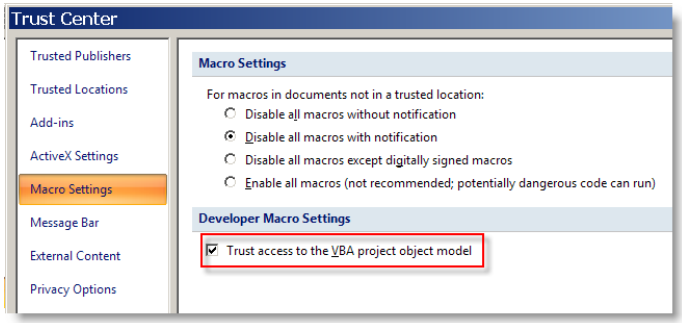
Fig. 2.3
Excel Options—Popular



5 Click Trust Center, and then click Trust Center Settings.

6 Click Macro Settings, and then select **Trust access to the VBA project object model** under **Developer Macro Settings**.

Fig. 2.4
Excel Options—Trust Center



Configuring QAD QXtend Excelerator Settings

By default, the global QXtend Excelerator settings are stored in the `QXtendWorkbookConfig.xml` file in the `My Documents\QAD\QAD QXtend Workbook` folder.

1 In the Ribbon, click the Developer tab.

2 In the QAD Excel Features group, select the features of QAD QXtend Excelerator that you want to turn on:

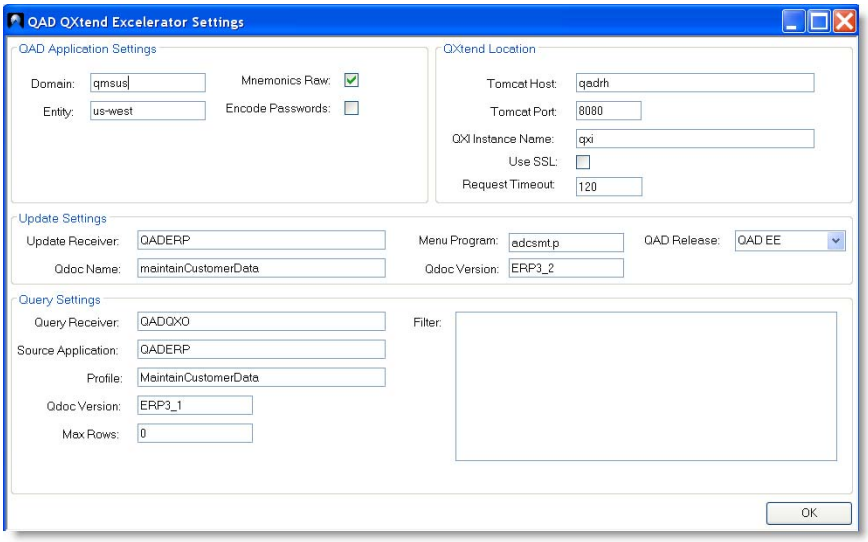
- Enable QAD Queries: Lets you query data in QAD applications through the QXtend Outbound Query Service.
- Enable Data Grid View: Lets you view data in a data grid view.

- Enable Change Workspace: Lets you change the current domain and entity.

3 In the QAD Configuration group, click QXtend Settings.

4 In the QXtend Configuration screen, set up proper settings for QAD QXtend Excelerator to correctly work with QXtend and QAD applications.

Fig. 2.5
QAD QXtend Excelerator Settings



QAD Application Settings

Domain and Entity. Specify the domain and entity of the target QAD Enterprise Application you want to query data from and load data into.

Mnemonics Raw. specify whether QXtend should process the raw value of a mnemonic field or the mnemonic itself. For example, the EMT Type field in Customer Maintenance is stored as a mnemonic. The raw value is 01; however, the mnemonic displayed on the screen is NON-EMT.

Encode Password. Specify whether you want to encode your password for accessing the target QAD Enterprise Applications. Encode Passwords is used if the QXtend application is running with <encodedPasswords> set to true. (This value is set in the `qxtendconfig.xml` configuration file in QXtend Inbound.)

QXtend Location

Tomcat Host and Tomcat Port. Provide the host and port information for the QXI server.

QXI Instance Name. Specify the Webapp name, which is the name of the Web service used to connect to QXtend Inbound.

Use SSL. Select this option if using Secure Socket Protocol https encryption. Enabling this is only applicable if QXtend has been configured to run under SSL.

Request Timeout. Enter, in seconds, the maximum wait time for responses from QXtend Inbound.

Update Settings

Update Receiver. Specify the QXtend Inbound receiver to use to load data into the target QAD application.

The rest of the fields in the group are automatically set when you import schema into the spreadsheet.

Qdoc Name. Displays the name of the QDoc API the spreadsheet relates to. The field defaults from the schema imported into the spreadsheet.

Qdoc Version. Displays the version of the QDoc API the spreadsheet relates to. The field defaults from the schema imported into the spreadsheet.

Menu Program. The menu program the QDoc API is mapped to. (Optional: this information is used when retrieving menu-specific column labels and authenticating Query requests.)

QAD Release. Specify the QAD release the spreadsheet is interacting with.

Query Settings

Query Receiver. Specify the receiver to use to query data from the source QAD application. The receiver must be a receiver listed under the Outbound module receivers defined in QXtend Inbound.

Source Application. Specify the source application instance name.

Profile. Specify the name of the profile in QXtend Outbound that defines the format of the queried data.

Note The format must be compatible with the request XSD that the spreadsheet was built from. This is important because the format of the query response data must map to the table and field names defined in the worksheet. The table name and field names are case sensitive.

QDoc Version. Specify the QDoc version.

Max Rows. Enter the default maximum number of records to retrieve into a worksheet during data query. Entering zero (0) indicates all matching rows will be returned.

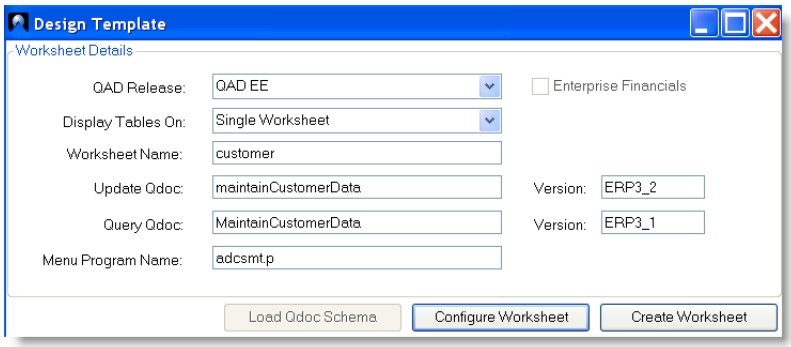
Filter. Enter a valid Progress query to use as filter criteria to filter records. The filter must be a valid Progress ABL WHERE clause and can only be defined against the top-level table of the QXO business object; for example:

```
cm_site = 'SITE1' and (cm_addr >= '0100' and cm_addr <= '100')
```

Designing Data Integration Spreadsheets

1 Under the Developer tab in the Ribbon, click Design Template. The pop-up window displays worksheet details settings.

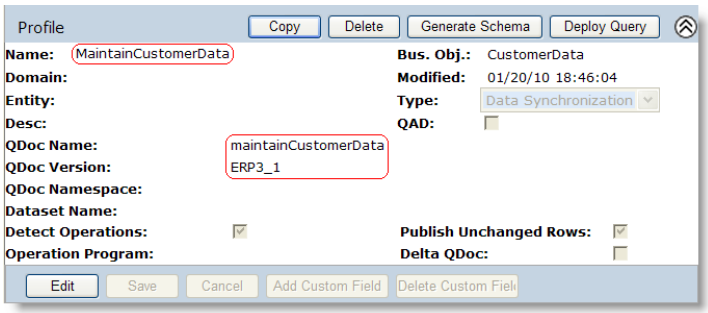
Fig. 2.6
Design Template



2 In the QAD Release field, select the version of the source and target QAD Enterprise Applications.

The Query QDoc name and version in the screen map to a corresponding profile defined in QXtend Outbound. For example, a spreadsheet has been designed to work with the Customer Data QDoc. This means the maintainCustomerData QDoc API has been imported to the worksheet. In QXtend Outbound there is a corresponding profile defined called MaintainCustomerData.

Fig. 2.7
Profile in QXO



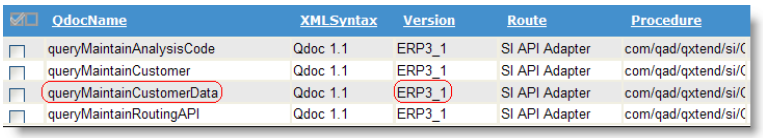
After the MaintainCustomerData profile has been deployed as a query to QXtend Inbound, it is available for use with the spreadsheet.

The version of the query QDoc depends on what QAD release has been selected, as set below:

QAD Enterprise Applications Release	Default Version
QAD EE	ERP2_1
QAD SE	eB21_1
eB2.1	eB21_1
eB2	eB2_1
eB	eB_1

The versions for QAD EE QDocs are displayed in QXtend Inbound as follows:

Fig. 2.8
QAD EE QDoc Versions



3 In the Display Tables On field, specify whether you want to display all data in a single worksheet or create a separate worksheet for each table.

Note When custom add-ins are deployed in your Excel, the application may become unstable and unresponsive when the number of worksheets in the file exceeds three. When this occurs, use the Single Worksheet option or uninstall the custom add-ins.

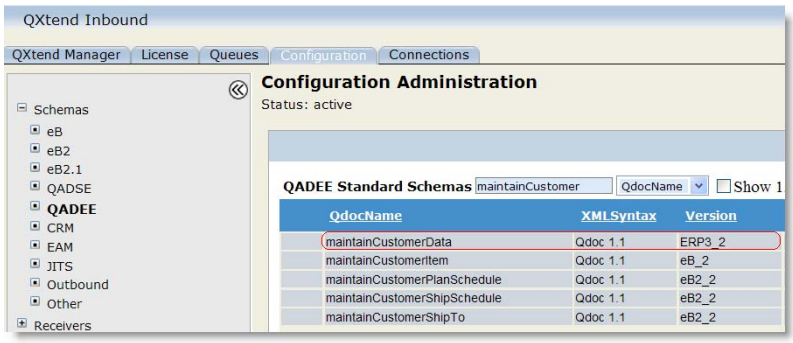
4 Click Load QDoc Schema, and then locate a QDoc file to load into the worksheet.

Only QDoc 1.1 syntax schemas are compatible with Excelerator.

The schemas are located in the `WEB-INF/schemas` directory of the QXtend Inbound application. To identify the correct version of the schema to import, view the schema information displayed in the Schema View in Configuration Manager in QXtend Inbound.

For example, for the QAD EE maintainCustomerData QDoc, the Schema View shows its version number is ERP3_2, so you need to retrieve `maintainCustomerData-ERP3_2.xsd` from the `TOMCAT_HOME/webapps/<QXI webapp>/WEB-INF/schemas/QADEE` directory.

Fig. 2.9
Schema View



The tool processes the QDoc schema, imports all the tables and fields into the worksheet, and automatically fills the appropriate values into the Worksheet Name, Update QDoc, and Query QDoc fields based on the QDoc data.

The Menu Program Name field displays the menu program the QDoc API relates to. This information is also used when retrieving menu specific column labels and authenticating Query QAD requests (QAD SE and QAD EE only).

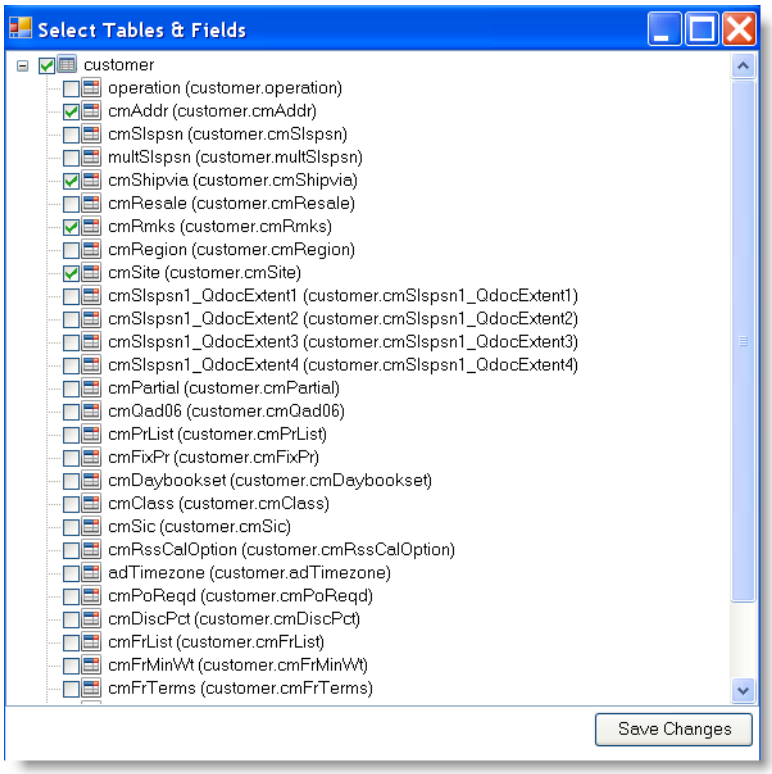
5 Optionally, click Configure Worksheet to customize the schema in the worksheet. In the Select Tables and Fields window, select the tables and fields you want in the worksheet. Table primary keys are automatically selected by the tool.

Note Column labels are only retrieved for 2009 and later releases of QAD EE and QAD SE.

To enable this functionality, you must configure a connection pool of type SIAPI in QXtend Outbound, and the name of the connection pool must be same as the Update Receiver specified in the Excelerator Settings panel.

For details on configuring connection pools, see *User Guide: QAD QXtend.*

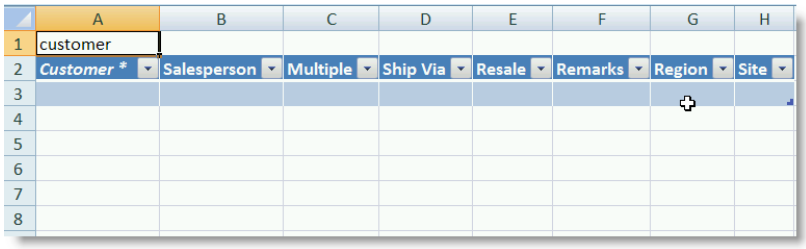
Fig. 2.10
Select Tables and Fields



6 Click Create Worksheet. If you chose to create a single worksheet, the tool creates a worksheet with tables and fields from the schema translated into rows and columns; if you chose to create multiple worksheets, the tool creates a separate worksheet for each table from the schema. Primary keys in tables are marked with an asterisk (*). In the worksheet, operation and index fields are displayed in the same sequence as that in the QDoc; all other fields are sorted in alphabetical order.

Note You can use Configure Worksheet to modify the schema structure in the schema template worksheet you have already created. So, if you forget to include a field, you can simply go back to Configure Worksheet to select the field you missed.

Fig. 2.11
Worksheet with Schema



7 Save the Excel file. You can now use the blank worksheets for entering data, querying data from the QAD application, and updating data to the QAD application.

Creating a CSV Template

After you design the data integration spreadsheet, you can create a CSV template from the spreadsheet. You can then populate the CSV file with data from QAD or third-party applications either manually or programmatically, and import it into the Excel spreadsheet for data synchronization with the target QAD application.

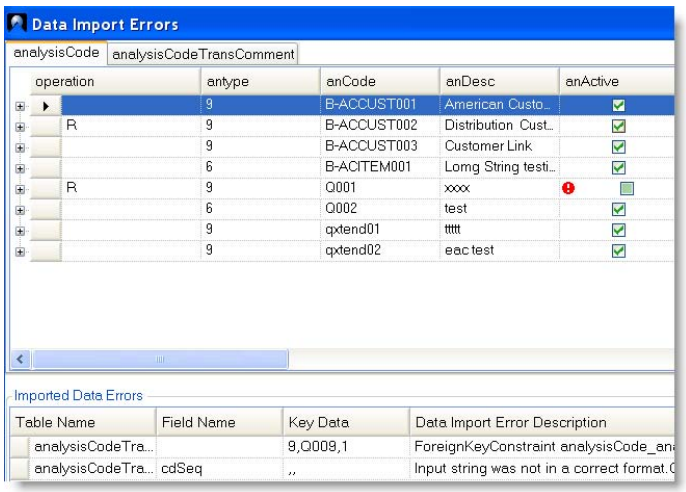
To create a CSV template, under the Developer tab in the Ribbon, click Create CSV Template, and select Single CSV Template to create one CSV file for all the tables in the worksheet, or select Template Per Table to create multiple CSV files, one for each table in the worksheet; then specify a location to save the file.

Performing Initial Data Load

For go-live implementation of QAD Enterprise Applications, you need to load some initial data into the system to quickly get it up and running. Use the following general steps to perform the initial data load using Excelerator:

1. Design a set of data integration spreadsheets for the initial data load.
2. Use the CSV template creation function to generate CSV templates that outline the expected formats of CSV files for use with the spreadsheets.
3. Use the CSV templates to convert data from a legacy system into the structure defined in the templates and load it into the spreadsheets. You populate data in the CSV templates either programmatically or through data output from the legacy system. The format of the CSV data must match the CSV template.
4. Use the Import From CSV function to load the data from the CSV files into the spreadsheets. Any errors that occur during CSV file import are captured and displayed in the grid view. You must correct these errors before you can proceed with data import.

Fig. 2.12
Data Import Errors



5. If required, modify the imported data in the spreadsheets.

6 Use the Update QAD function to load the data from the spreadsheets into target QAD Enterprise Applications.

Performing Data Conversion

Use the following general steps to perform data conversion when you upgrade your QAD Enterprise Applications:

1 Design a set of data integration spreadsheets for the data conversion.

2 Use the Query QAD function to query data from the source QAD Enterprise Applications into the spreadsheets.

3 Modify the data in the spreadsheets as required.

4 Use the Change Workspace function to switch to the domain and entity of the target QAD Enterprise Applications.

5 Use the Update QAD function to load the data from the spreadsheets into target QAD Enterprise Applications.

Chapter 3

Using QAD QXtend Excelerator

Overview

This section assumes that you are a user responsible for performing data integration between QAD products using QAD QXtend Excelerator. By importing QDoc schemas, you use QAD QXtend Excelerator to translate database tables and fields of QAD Enterprise Applications into rows and columns in the Excel spreadsheets. You can then use the spreadsheets to hold records queried from the source QAD application, view and modify data, and finally update them to the target QAD application.

Querying Data from the Source Application

Note The Query QAD function is disabled when the spreadsheet is designed to work with an EE Financials component schema. This is because the query service is not currently compatible with the EE Financials components.

1 Under the QAD Tools tab in the Ribbon, click Query QAD.

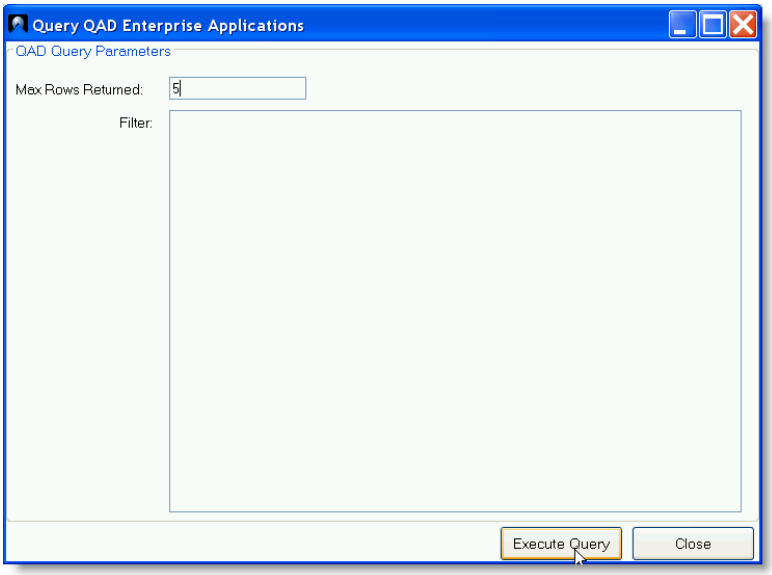
2 In the Query QAD Enterprise Applications window, define the query parameters.

Max Rows Returned. Enter the maximum number of records to retrieve into a worksheet. Entering zero (0) indicates all matching rows will be returned.

Filter. Enter a valid Progress query to use as filter criteria to filter records. The filter must be a valid Progress ABL WHERE clause and can only be defined against the top-level table of the QXO business object; for example:

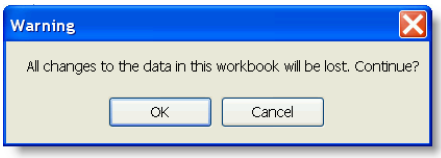
```
cm_site = 'SITE1' and (cm_addr >= '0100' and cm_addr <= '100')
```

Fig. 3.1
QAD Query Parameters



3 Click Execute Query. A warning message appears. Click OK to proceed.

Fig. 3.2
QAD Query Warning



4 The query pulls records from the source QAD application into the worksheet. Save the file.

Troubleshooting Data Queries

If no data comes back from the data query, examine the `qdocResponses.log` file for details on what data was returned and whether it matches the format expected in the worksheet and Excelerator settings.

Make sure that worksheet and column header names in the Excelerator worksheet match data object and field XML names in the profile definition in QXtend Outbound and that the profile name specified in the Excelerator settings is identical to that defined in QXtend Outbound. All these names are case-sensitive and they must be exactly mapped so that Excelerator knows where to place queried data into the corresponding cells in the worksheet.

Fig. 3.3
Mapping of Data Object and Field Names

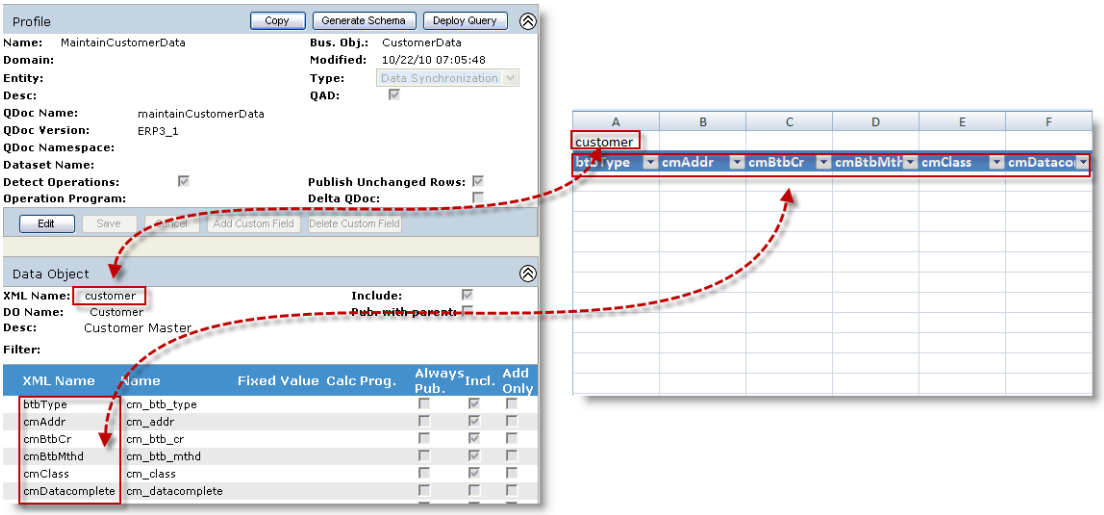
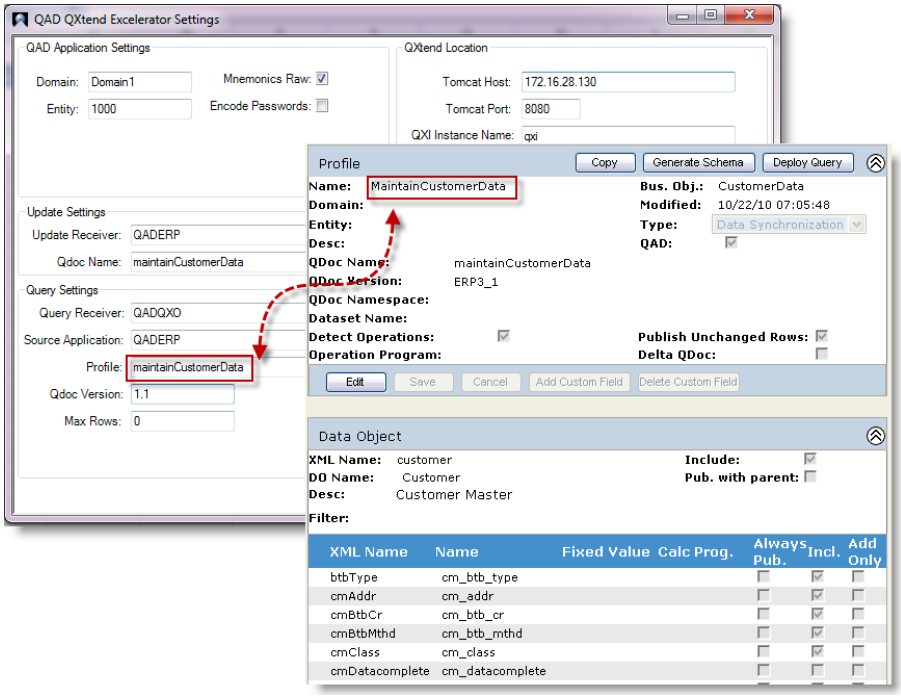


Fig. 3.4
Mapping of Profile Names



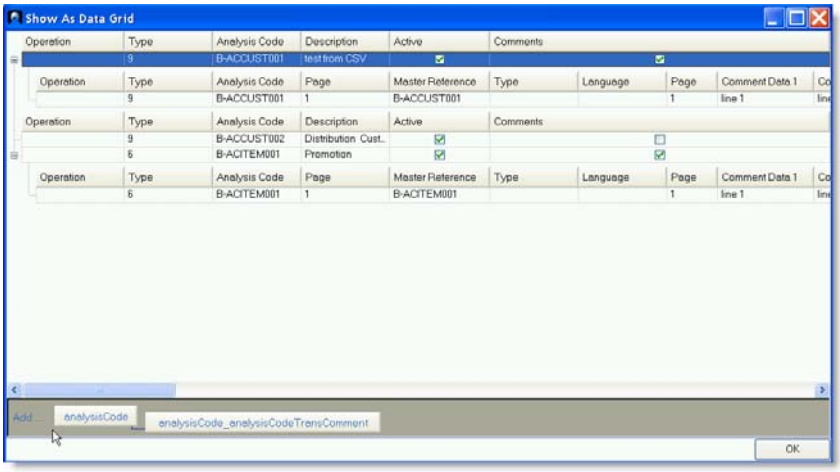
Viewing and Modifying Data

After you execute a query to import data from the source QAD application into your worksheets, you can view and modify data just like you do with any other Excel worksheets.

The tool does not perform real-time validation of the data you enter in the worksheet, but if you enter invalid data, error will occur when you update records to the target QAD application later.

Alternatively, when the Enable Data Grid View option (in the QAD Excel Feature group under the Developer tab) is selected, you can click Grid View under the QAD Tools tab to view and edit the data in the data grid view. The data grid view gives you a better view of the parent-child relationships among data.

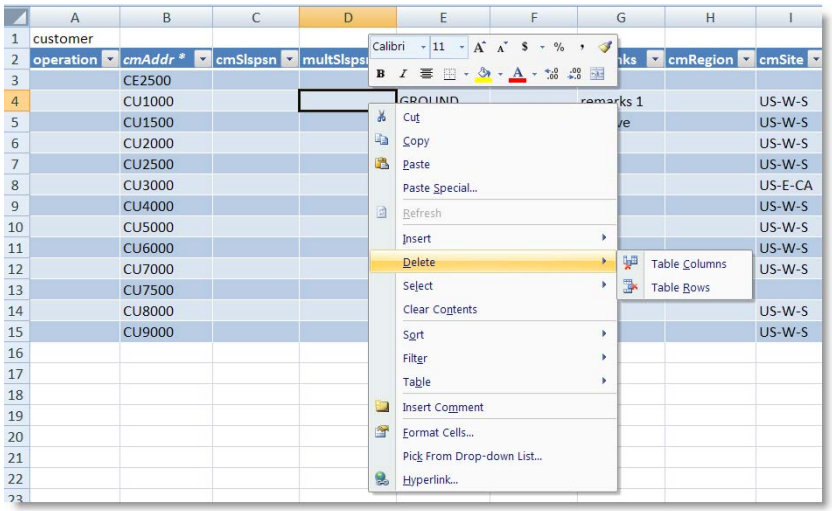
Fig. 3.5
Data Grid View



To delete records from the worksheet, select the rows and right-click; then from the pop-up menu, point to Delete and select Table Rows. This also deletes any corresponding child records in the worksheet. For example, if you delete a record in table routing, the tool automatically deletes its child records that reference the primary key of the parent record in table routingTransComment.

Deleting rows from the worksheet will not delete corresponding records from the target QAD Enterprise Applications when you perform data update. To remove records from the target application, you must populate the “operation” column with R (for Remove) in corresponding rows to indicate to QXtend Inbound to delete the records when processing the QDoc request during data update.

Fig. 3.6
Deleting Records

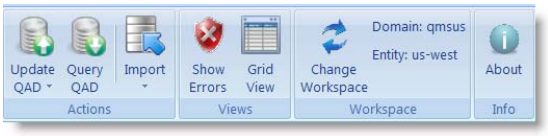


Changing Workspace

If the change workspace feature is enabled, you can switch the current domain and entity your Excelerator spreadsheet is currently working with.

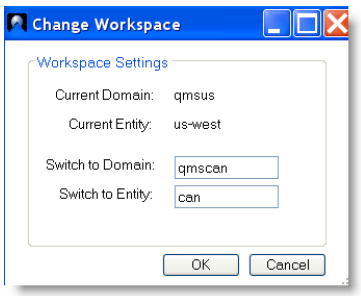
The current workspace for the spreadsheet is displayed in the Workspace group under the QAD Tools tab.

Fig. 3.7
Current Workspace



Click the Change Workspace button to switch to another domain and entity. Any Query QAD and Update QAD requests will use the new domain and entity combination. The workspace group will be updated to display the current domain and entity of the spreadsheet.

Fig. 3.8
Change Workspace

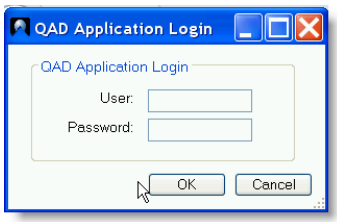


Updating Data to the Target QAD Application

When you have finished viewing and editing data in the worksheet, you can update it to the target QAD application through QXtend Inbound.

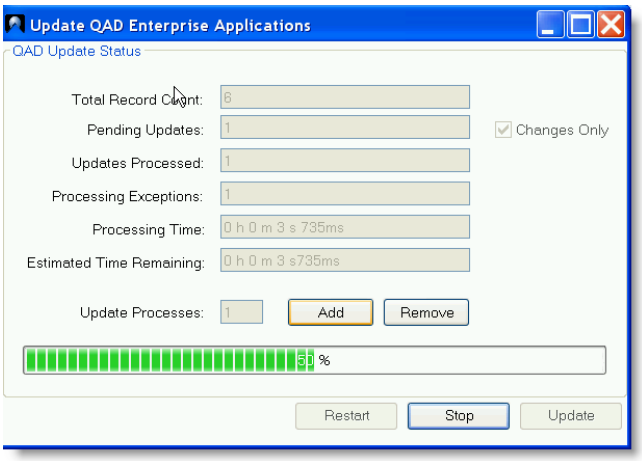
1. Under the QAD Tools tab, click Update QAD and select from one of the following options:
   - Process Changes: Only submit records that have been modified.
   - Process All: Submit all records in the worksheets.
2. A QAD Application Login window appears. Provide log-in information to access the target QAD Enterprise Applications.

Fig. 3.9
QAD Application Log-In



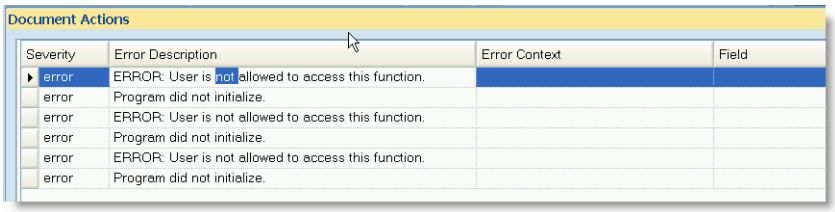
3 A QAD Update Status window appears with detailed update status information and progress bar. You can stop and restart the process as needed.

Fig. 3.10
QAD Update Status



4 When the update is complete, any errors that occurred show in the Document Actions pane below the worksheets. You can switch the error information on and off using the Show/Hide Errors button under the QAD Tools tab. Double-clicking on a row in the errors panel sets the focus in the worksheet to the row with the error.

Fig. 3.11
QAD Update Status



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