Training Guide

QAD Process Maps

70-3292-2015EE
QAD Process Maps TG 2015 Enterprise Edition
April 2015

QAD Process Maps 2015EE.pdf/tfb/mdf

QAD Inc.
100 Innovation Place
Santa Barbara, California 93108
Phone (805) 684-6614
Fax (805) 684-1890
http://www.qad.com

Contents

QAD Process Maps Change Summary

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

Date/Version	Description	Reference
April 2015/v2015 EE	Rebranded for QAD 2015 EE	--
March 2014/v2014 EE	Rebranded for QAD 2014 EE	--
October 2013/v2013.1 EE	Updated Prerequisites section	Page 9
August 2013/v2013 EE	1st Release; Updated chapter 5 and 7 and added QPC chapter	--

About This Course

Course Description

This course explains QAD process maps and how to use the Process Editor to modify and create them. If you have administrative access to modify or create process maps in your company, this course will teach you how to do it.

Use this training guide to follow along with instructor-led or online, self-study sessions.

There are many exercises that require you to have access to the process maps and Editor. See the Virtual Environments information below.

Course Objectives

By the end of this training, you will be able to:

- Navigate through process maps and links
- Create new maps and modify existing maps
- Add/delete/change steps in a process
- Add links to other screens & information
- Enhance maps with:
  - Images
  - Colors
- Follow best practices for designing process maps

Audience

This class is intended for customers and QAD partners, alliances and employees that have the administrative access and responsibility to create, modify and maintain process maps in QAD Enterprise Applications. Typically, this might be management, members of implementation teams, business analysts or I.T. staff that support the use of QAD Enterprise Applications.

Prerequisites

For class sessions (in person or online), please complete the first course on your own before attending the training: Process Map Editor: Introduction (1 of 9), Course #OLT-006830.

Course Credit and Scheduling

It is designed to be taught in ½-day.

Virtual Environment Information

Participants should have access to the process maps and the Editor in order to do the exercises. This can be a test or training environment at your company, or you can use the virtual training labs that are available in the QAD Learning Center.

- If you use your company's test/training environment: make sure you have access to the Process Editor: check the application menu to see if you have an Administration tab with the Process Editor listed underneath it. If not, request access from an administrator at your company.
- If you use the QAD virtual training labs in the Learning Center, choose the environment for EE or SE, depending on which version you use. Note that the labs only remain available for 24 hours at a time.
- QAD employees can connect to the QPC environments on http://qpc.qad.com.

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.

SETUP

Setup Virtual Environments (QPC)

The QAD Product Center (QPC) is used for in-class exercises. If you have never used QPC before, this short PowerPoint (PPT) will show you how to log on and set up a session so you're ready to practice what you learn in class exercises.

QAD Product Center (QPC)

Logging On

QAD Product Center (QPC)

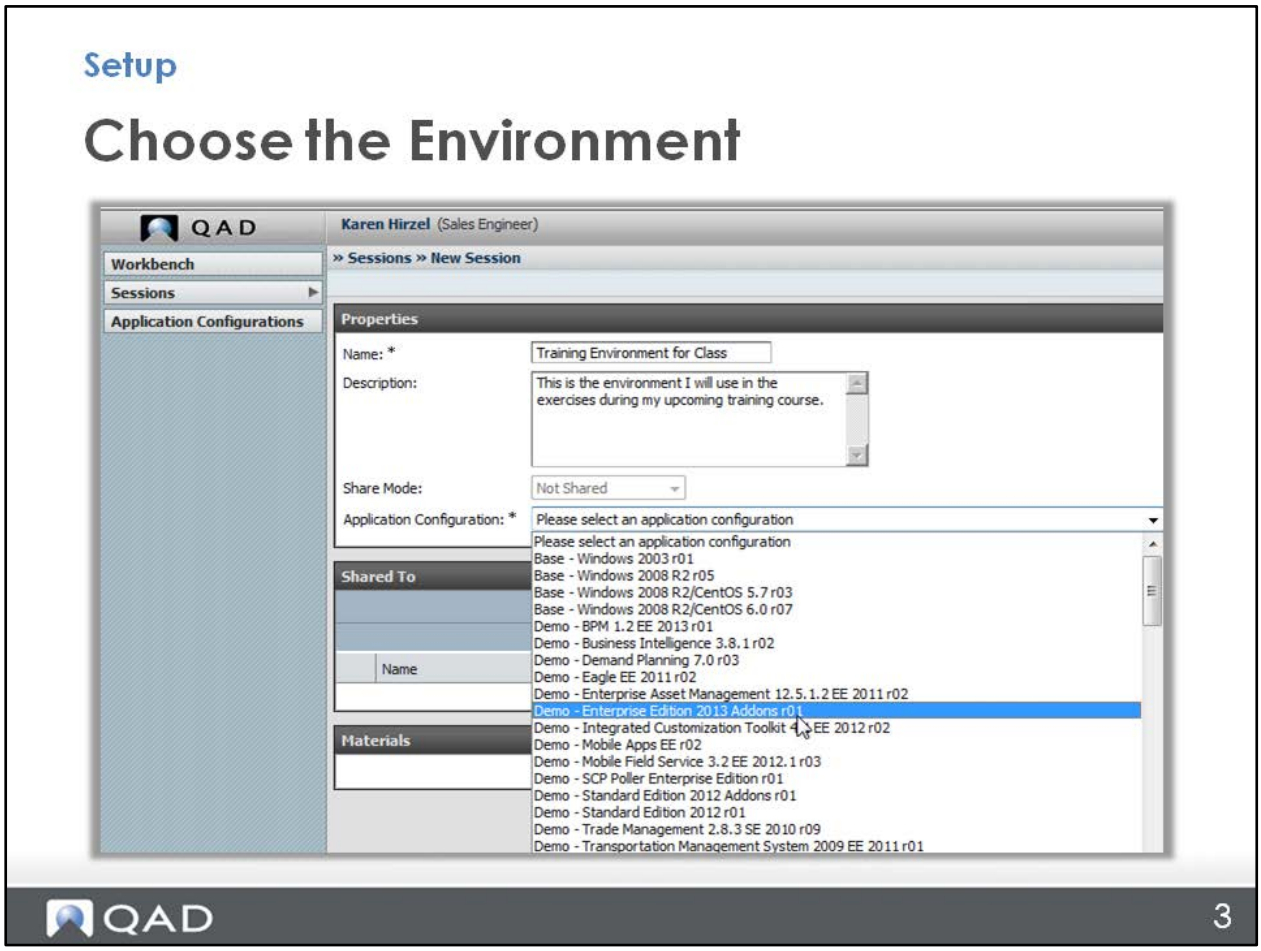
1. Go to: http://qpc.qad.com
2. Log in with network ID
3. Choose your department

4. Click "New Session" button (upper right)

QAD 2

Questions? Visit community.qad.com
Comments? Go to goo.gl/MfwKHm

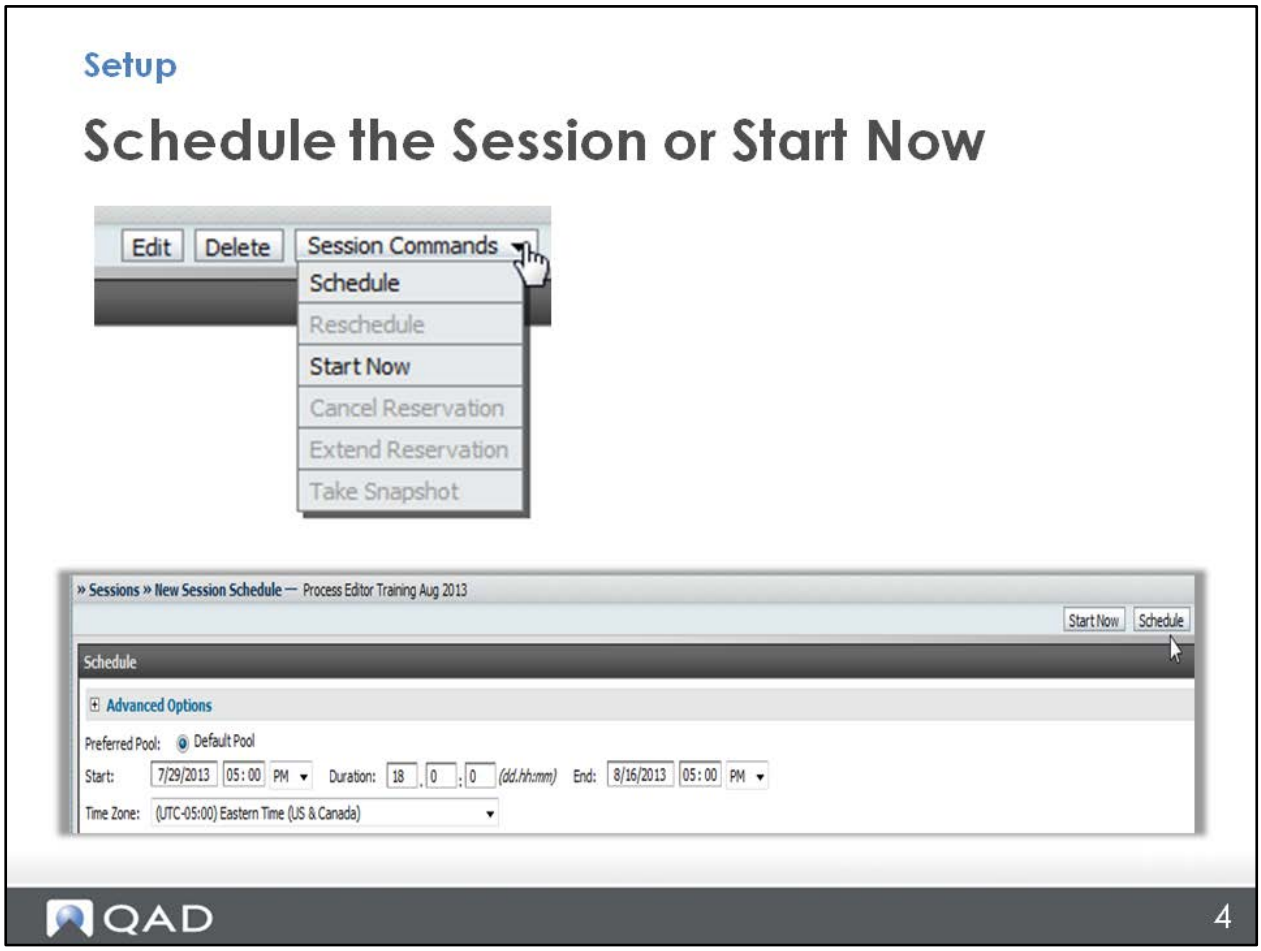
Choose the Environment



Name the session (for example, if you're going to use it for Process Editor class, name it Process Editor Training). The description is optional, it's just for you to know why you've set it up.

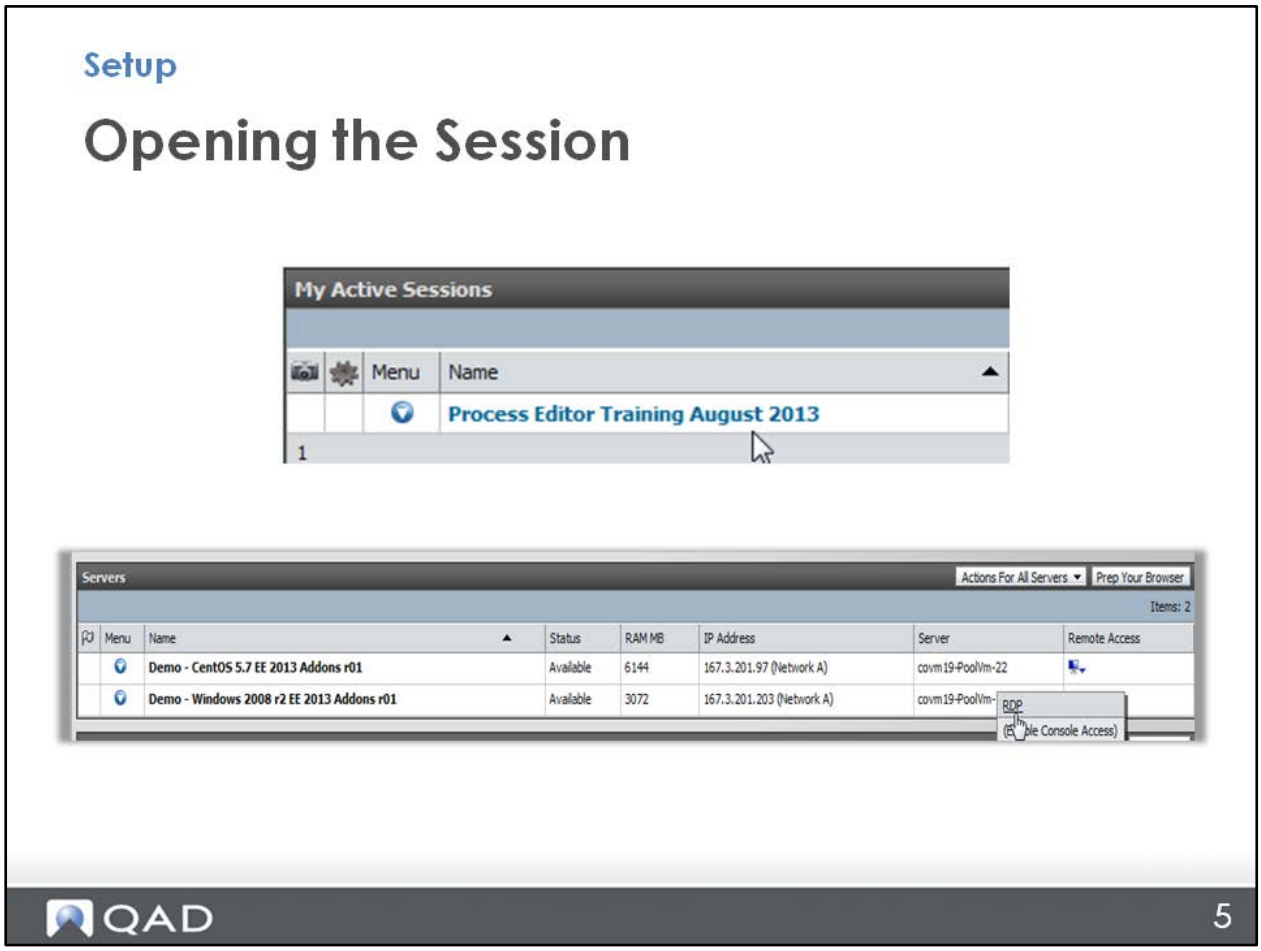
Under Application Configuration, choose the environment you want to use – it will probably be the latest version available, and it depends on which module you may need, but you should choose from the Demo environments. For example, choose Demo – Enterprise Edition 2013 Addons r01. Then click the Save button to save your session.

Schedule the Session or Start Now



Under Session Commands on the far right, choose to “Schedule.” Then, select your time zone and the start/end time. Or, if you need to start right away, there is an option to “Start Now.” (It takes several minutes to process though.)

Opening the Session



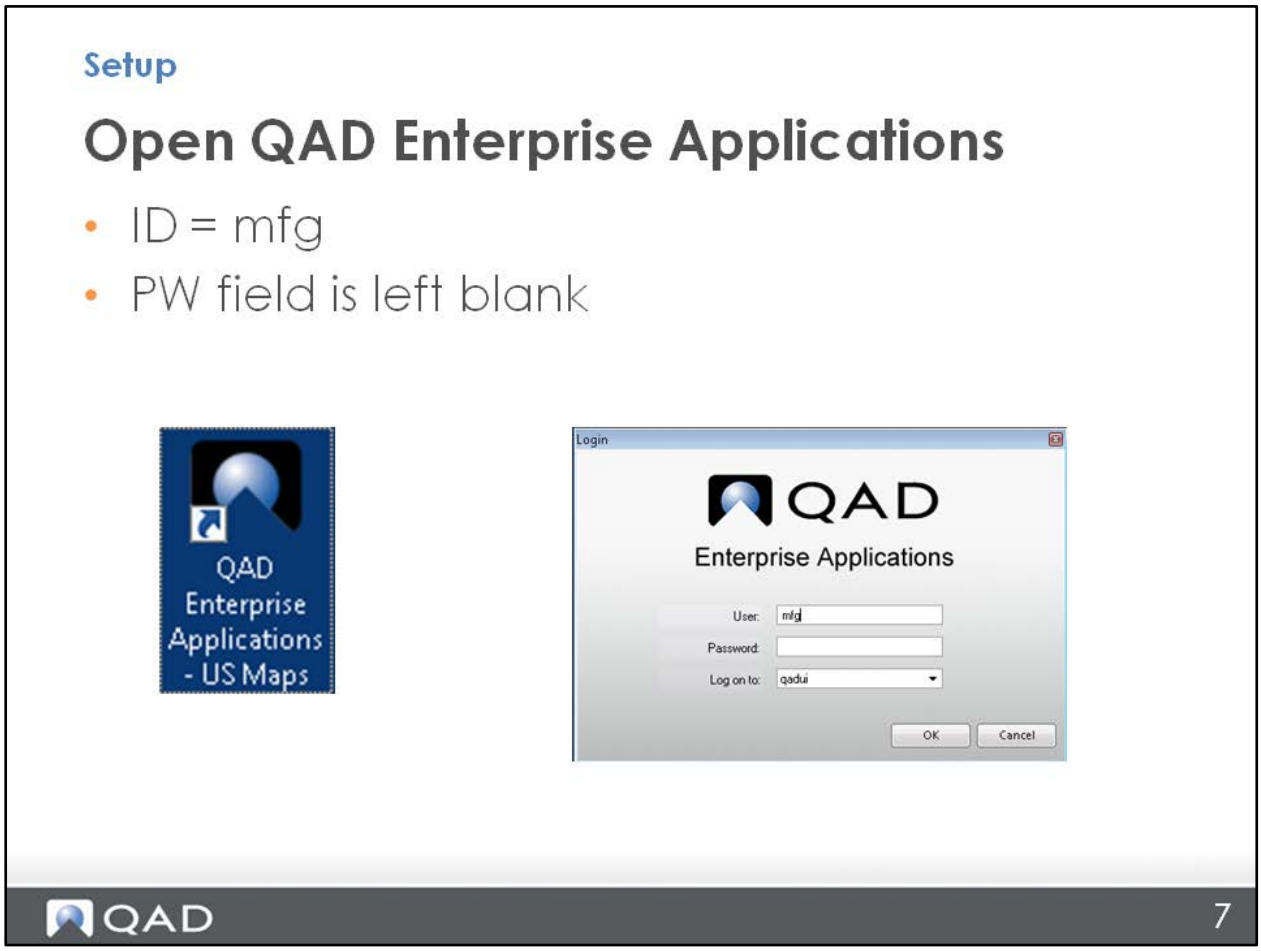
Once your session is ready, you will just click on the name to open it. Then, down where you see the Windows environment listed, look on the right side under the Remote Access column and you'll see a downward arrow that opens a menu. Choose RDP (Remote Desktop). When the window opens, click Connect.

Entering RDP

On the next login screen, use ID: demo and PW: qad, then click the arrow to open the remote desktop.

Note that you can double-click on the title bar at the top of this screen so that you can still see your own desktop system tray (and have access to your applications there) while you're in the remote desktop session.

Open QAD Enterprise Applications



Open QAD Enterprise Applications.

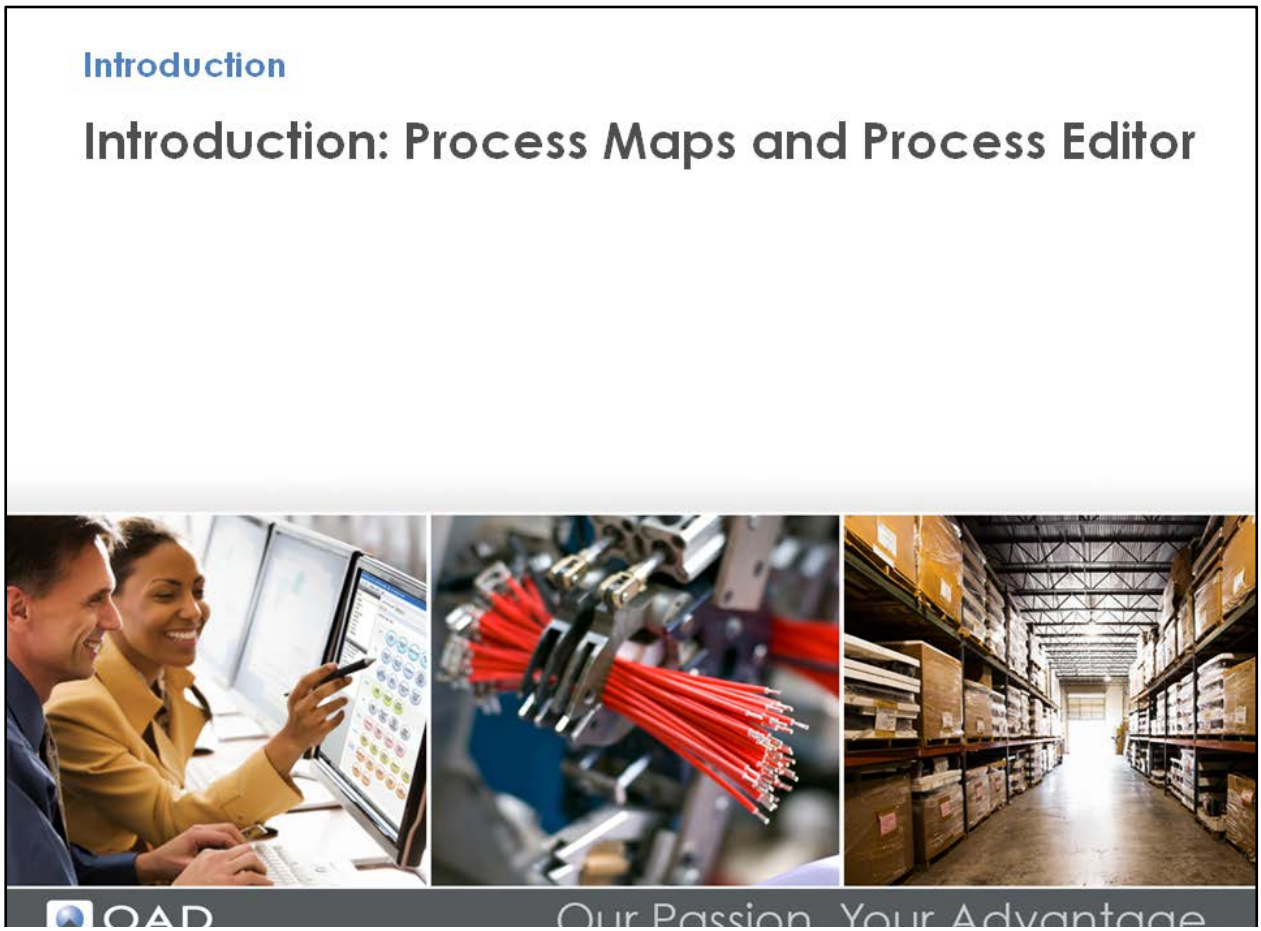
(There is one for the US and one for EMEA.)

To log in here, use the ID “mfg” and leave the password field blank.

Now you should be in QAD Enterprise Applications. If you have any problems getting into QPC, you can contact the QAD Product Center (productcenter@qad.com) or the Education mailbox (education@qad.com).

CHAPTER 1

Introduction: Process Maps and Process Editor

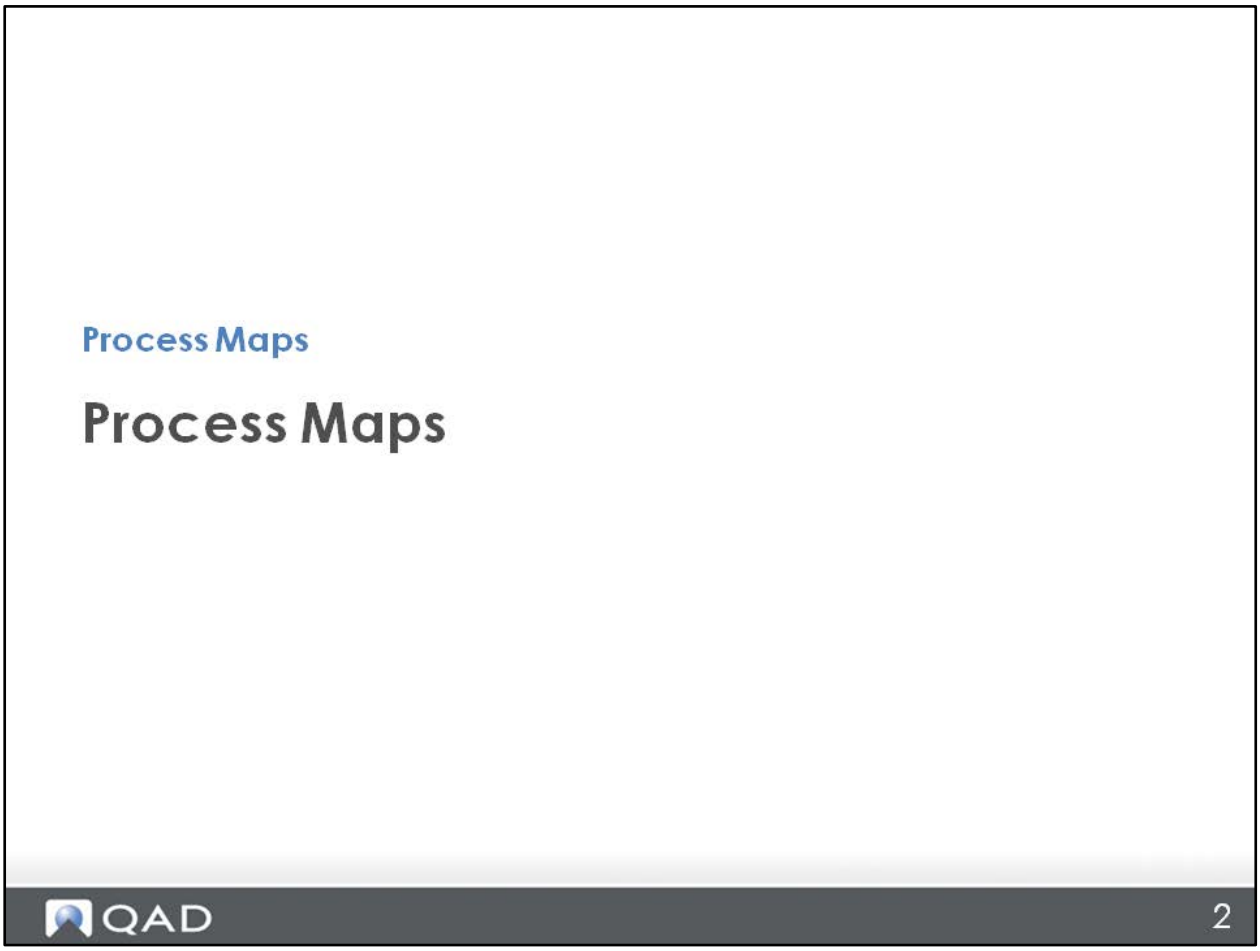


This is an introduction to process maps and the Process Editor used for creating and modifying the QAD process maps.

To watch a video of this section, go to the Learning Center (http://learning.qad.com) and use the Smart Search tab to search the key words “Process Editor.” Take the Process Editor: Introduction (1 of 9), Course #OLT-006830.

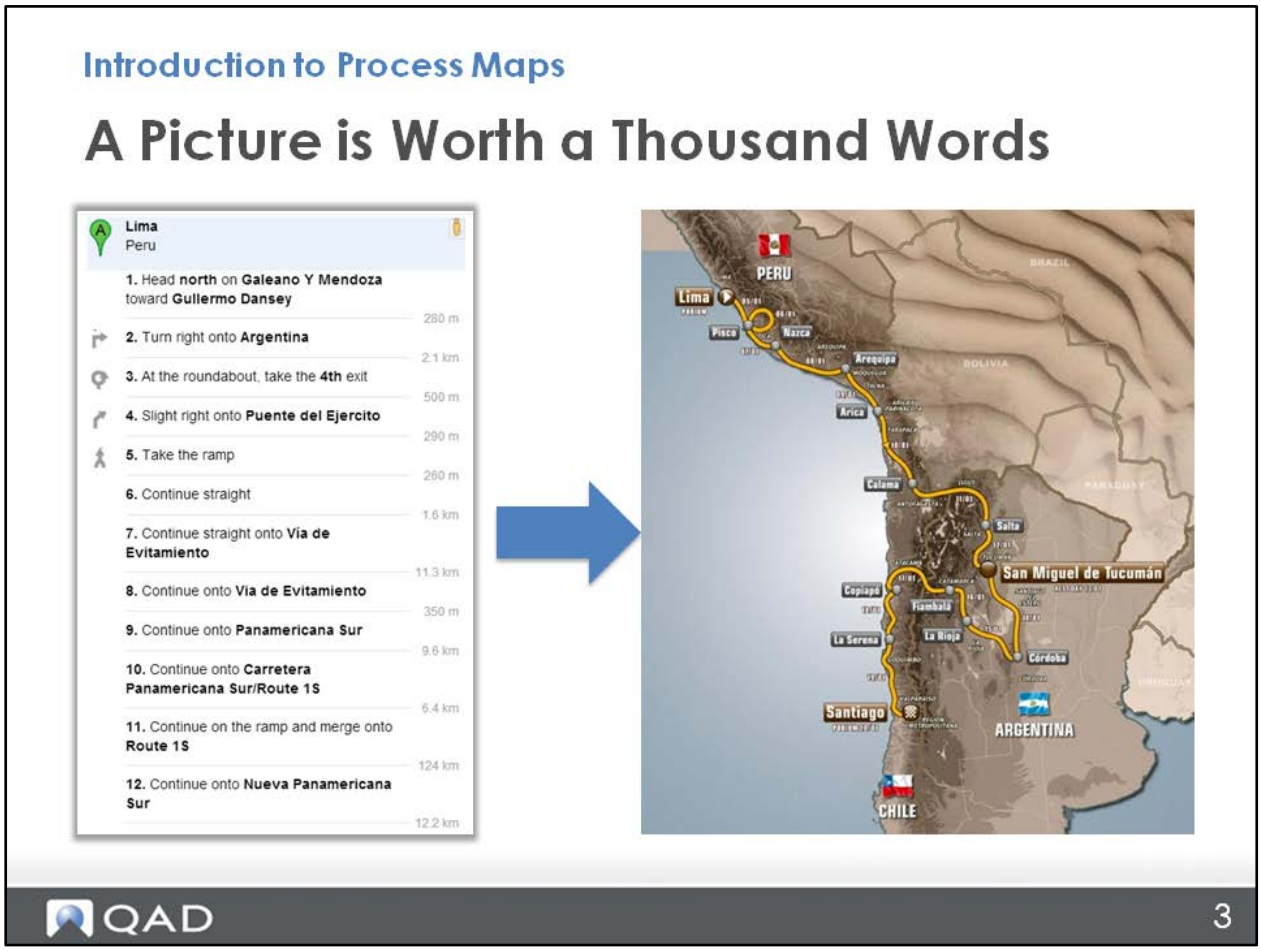
Or, if you are already logged into the Learning Center, just click here:
https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?id=22506430759

Process Maps



This topic discusses how to use the Process Editor.

A Picture is Worth a Thousand Words



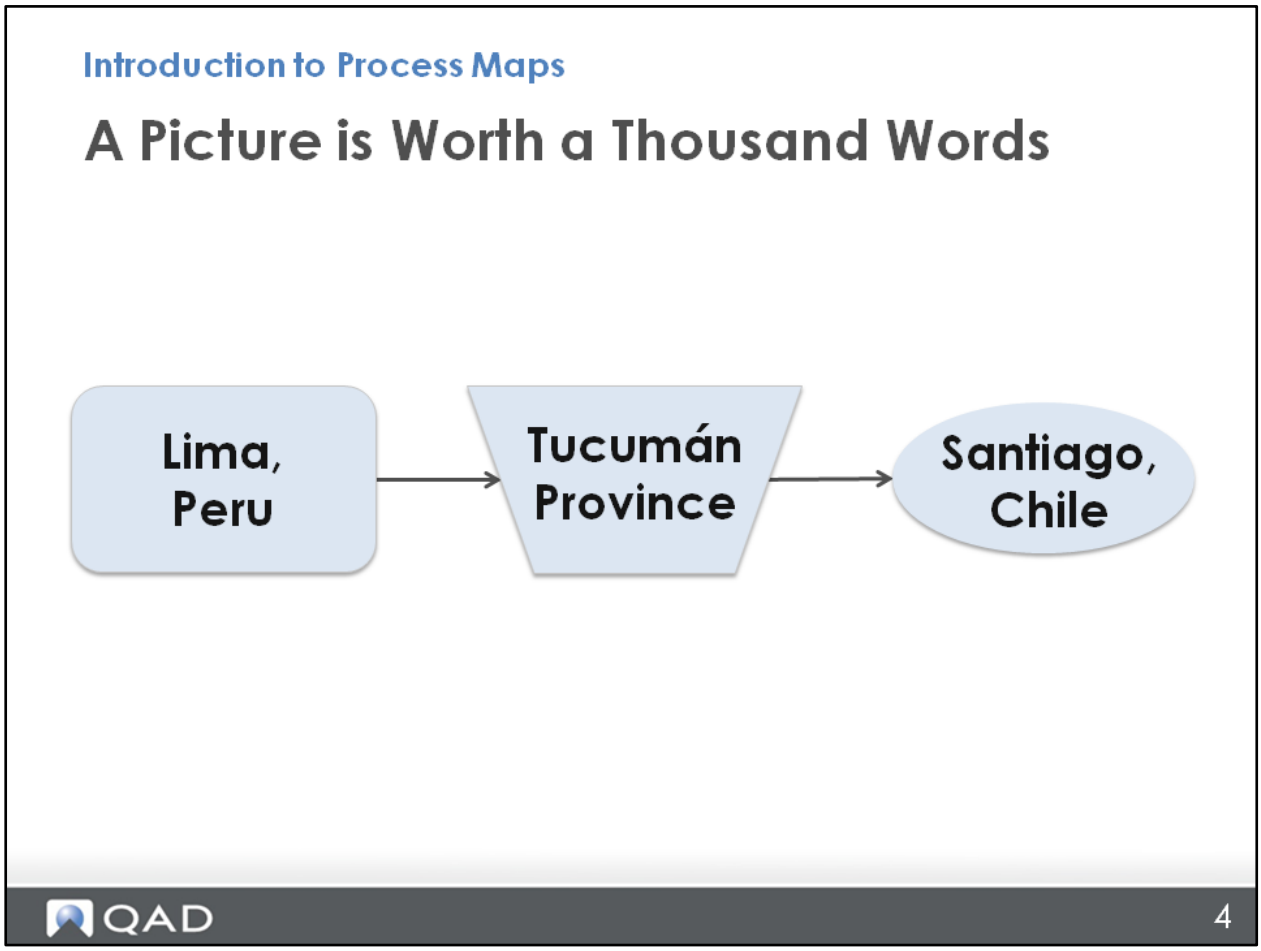
A picture is worth a thousand words.

Pictures tell a story in a way everyone can understand – CEOs, managers, technicians, and QAD users all over the world speak this language. Visual presentation is the idea around process maps.

For example, if you read through the Google Map directions shown here, it might be difficult to get the big picture of what is going on.

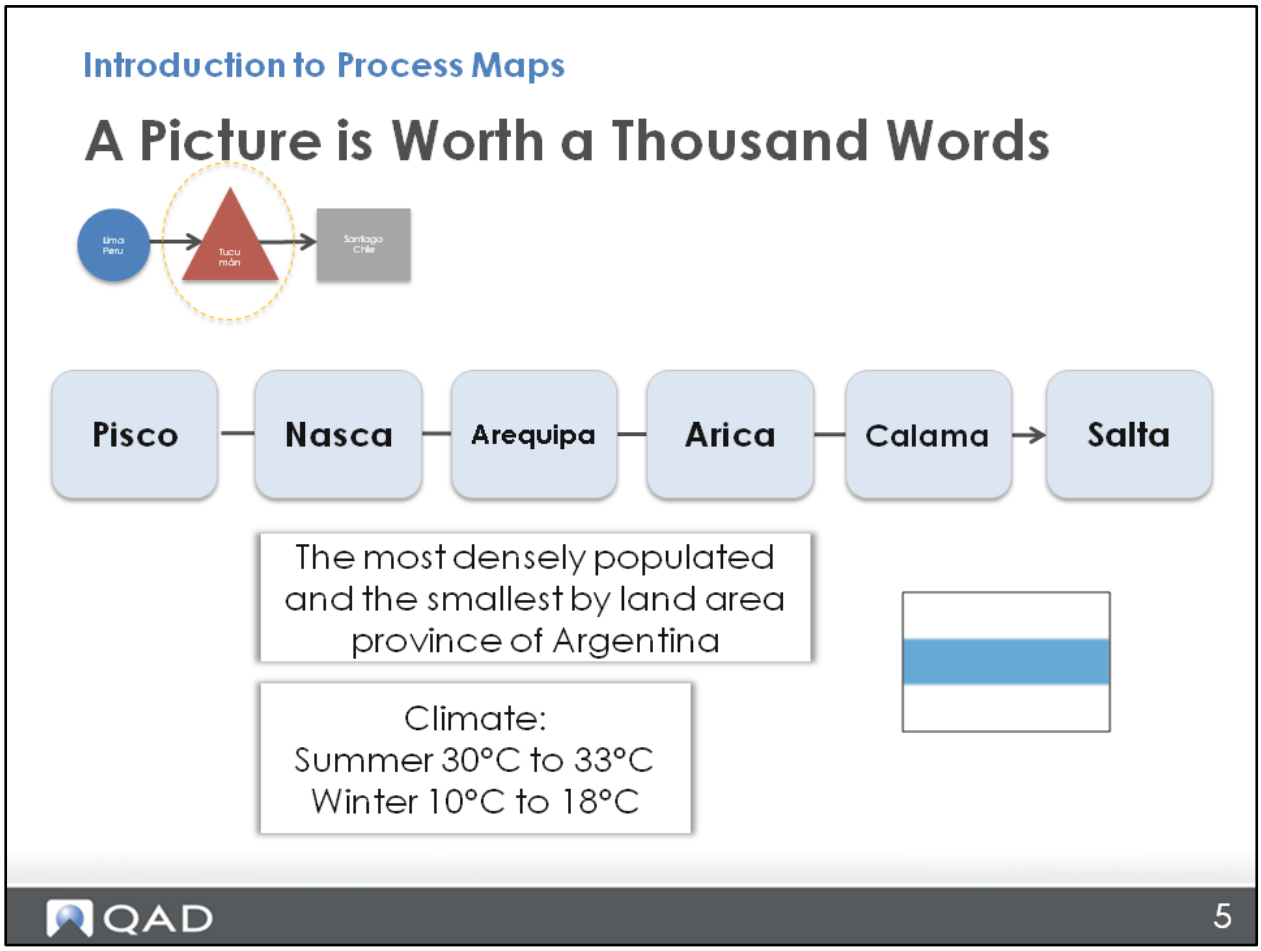
However, a simple glimpse at a map tells quite a compelling story. This shows the Dakar Rally, an off-road vehicle race in South America, going from Lima, Peru, to Santiago, Chile.

A Picture is Worth a Thousand Words



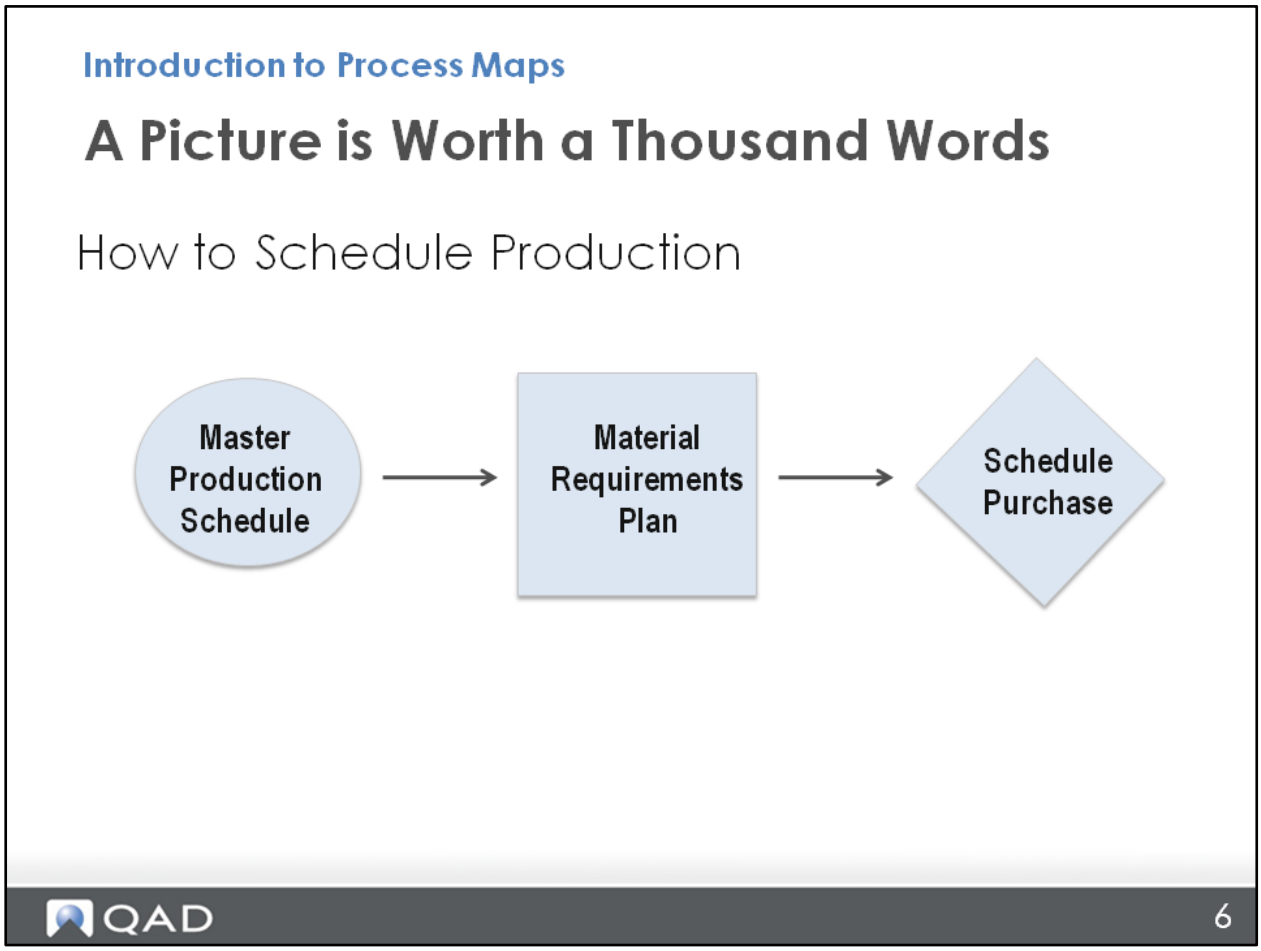
Seeing the end-to-end process graphically displayed makes it easier to follow and perform steps, like following the Dakar Rally route from Lima through Tucumán to Santiago. If this were a process map, you could link from each point to get another map of the route and directions.

A Picture is Worth a Thousand Words



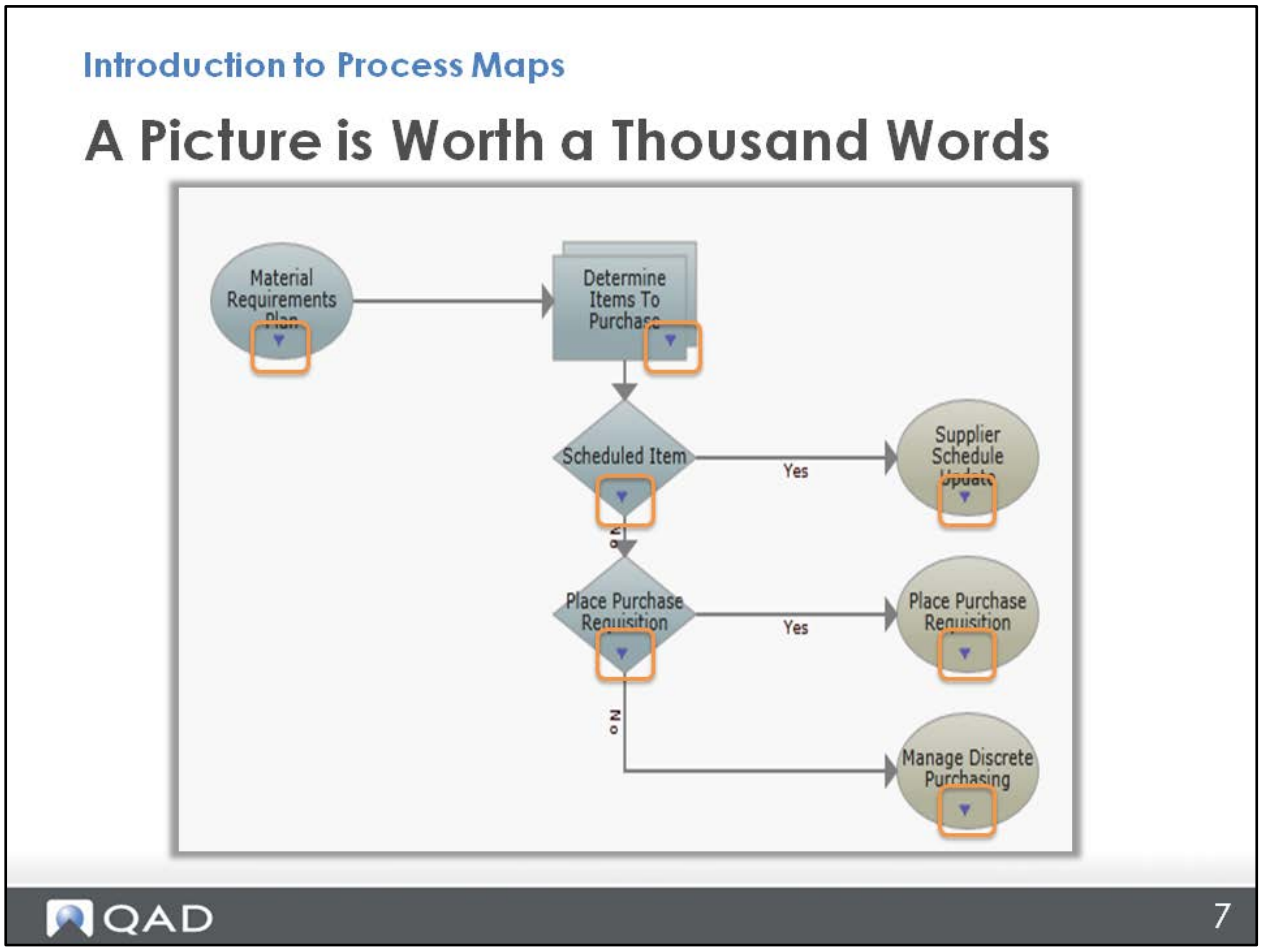
For example, to see how to get to Tucumán from Lima, you could click on the node to learn more about the area and the climate.

A Picture is Worth a Thousand Words



Like a flow chart, a process map visually shows the steps of a process, but QAD process maps are linked to the QAD screens and supporting documentation, AND they are already included in QAD Enterprise Applications.

A Picture is Worth a Thousand Words

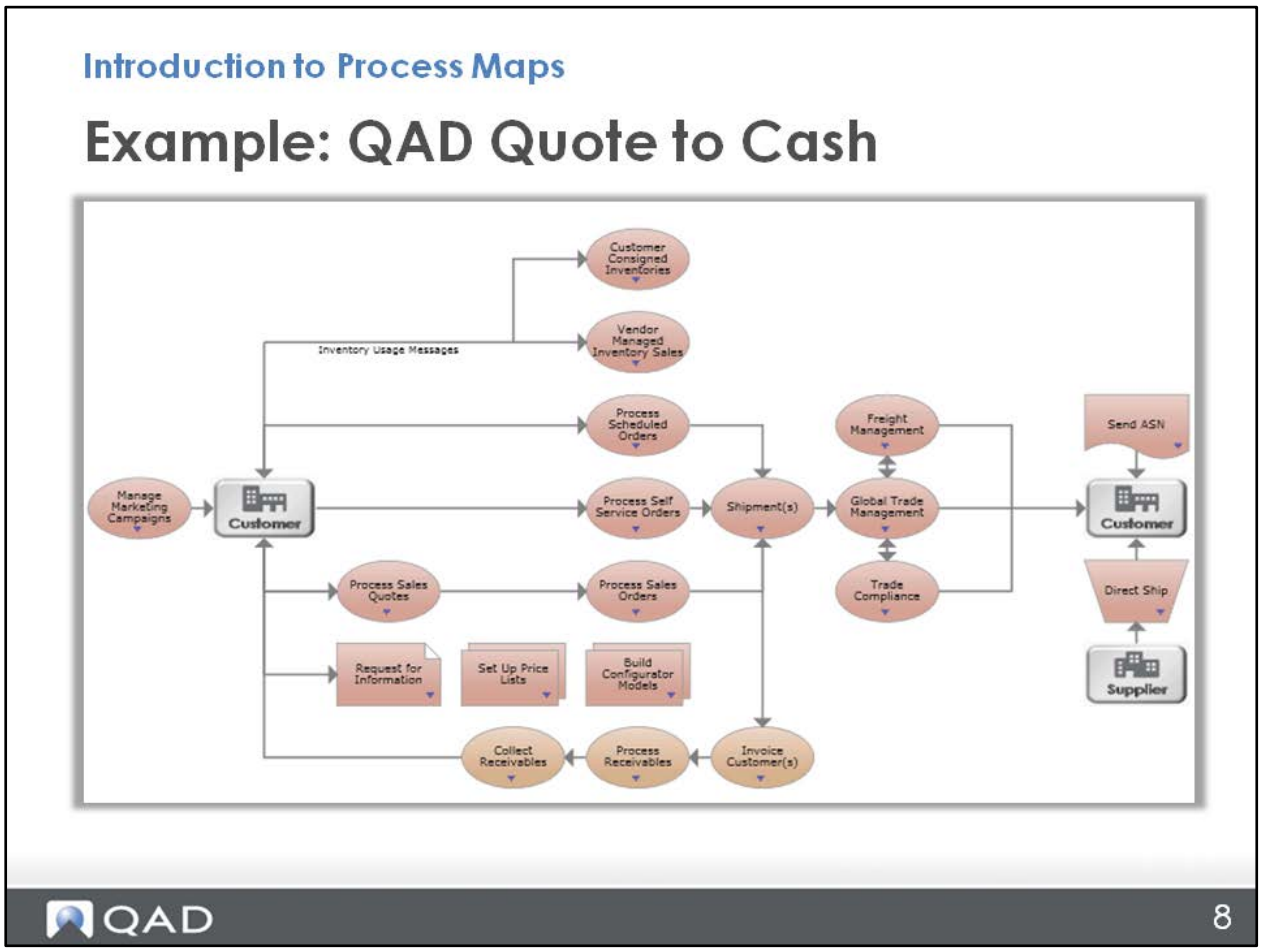


So, rather than a simple flow chart about scheduling production, you can have a process map with links to the screens to use for that step and the supporting training documentation.

This is an example of the QAD Planning and Scheduling process map.

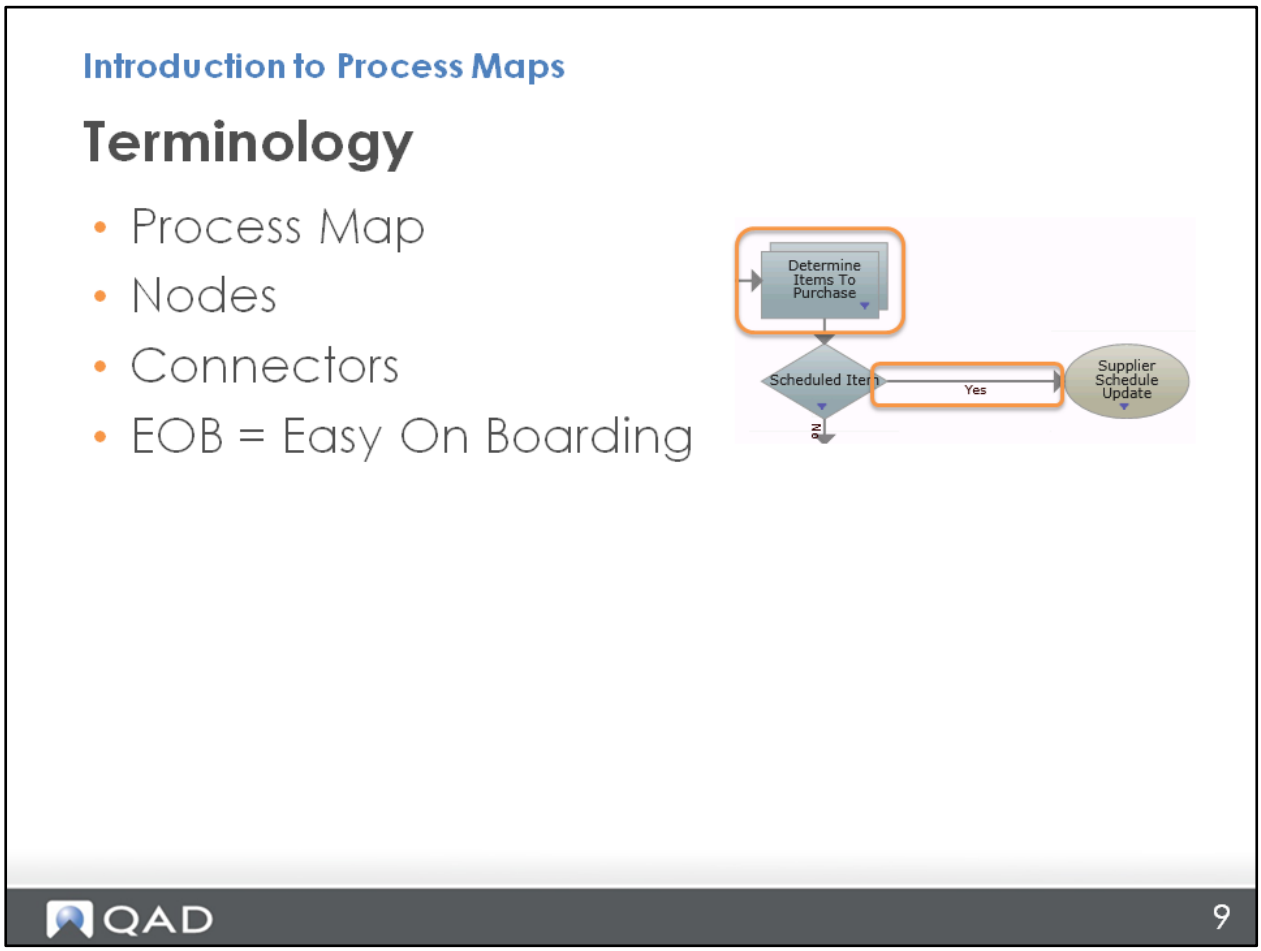
An icon within the node represents multiple links associated with the node.

Example: QAD Quote to Cash



Here is an example of the QAD Quote to Cash process.

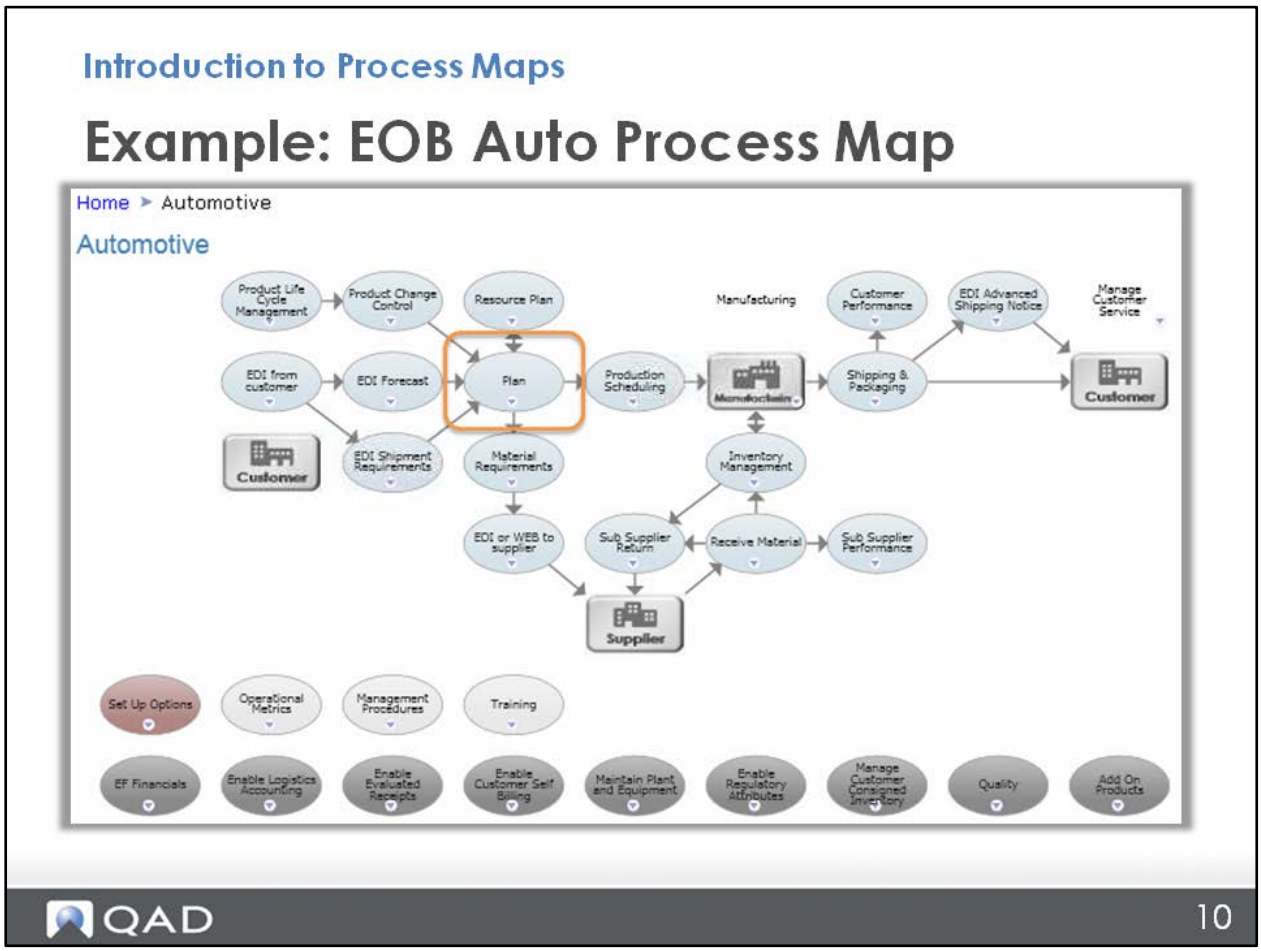
Terminology



Key terms used in this session include:

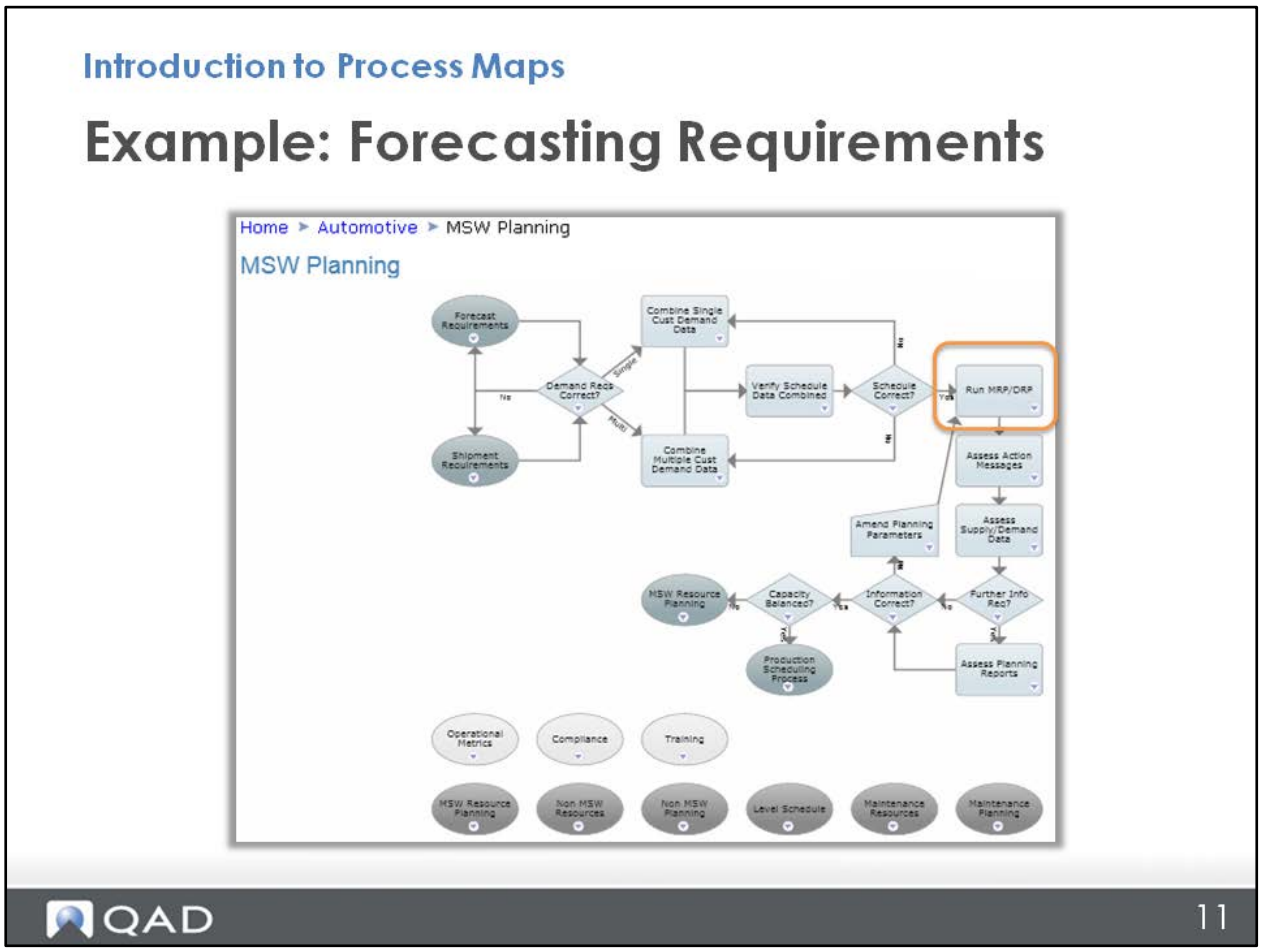
- A process map (or the term “process mapping”) refers to a technique where a business process or workflow is converted into a visual, step-by-step diagram.
- The shapes on a process map are called nodes, and they typically indicate a step within the process.
- Connectors are lines or arrows indicating the direction of execution for the steps within the process.
- EOB stands for Easy On Boarding. QAD EOB is for companies seeking an industry best-practice solution with reduced implementation effort and total cost of ownership. The methodology is a scalable option offering predefined processes, predictable costs, and reduced implementation times.

Example: EOB Auto Process Map



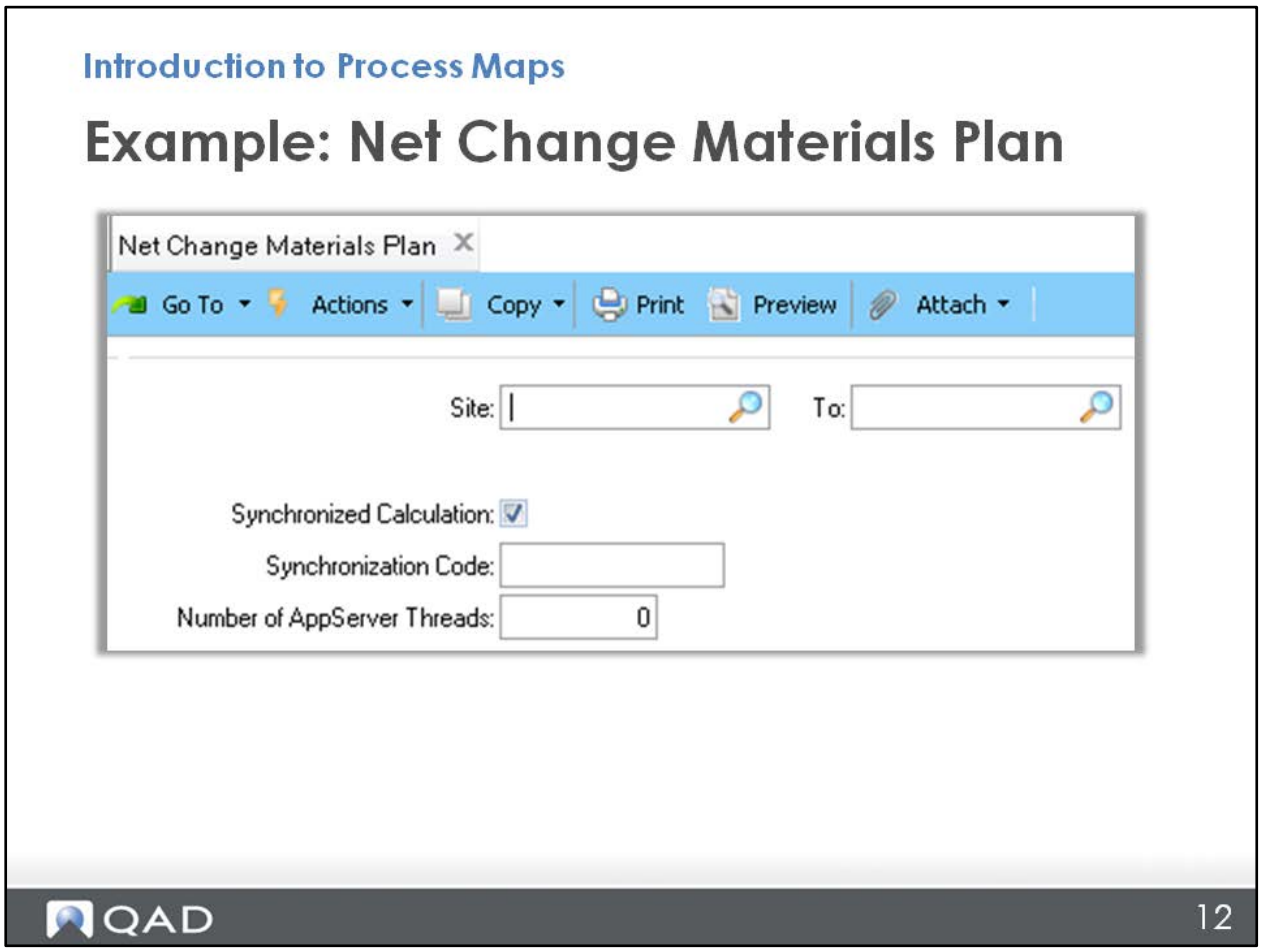
For example, here is the EOB vertical industry process map for automotive. As you click the nodes, you get farther down into the process and end up seeing each step you need to perform. For example, click the Plan node.

Example: Forecasting Requirements



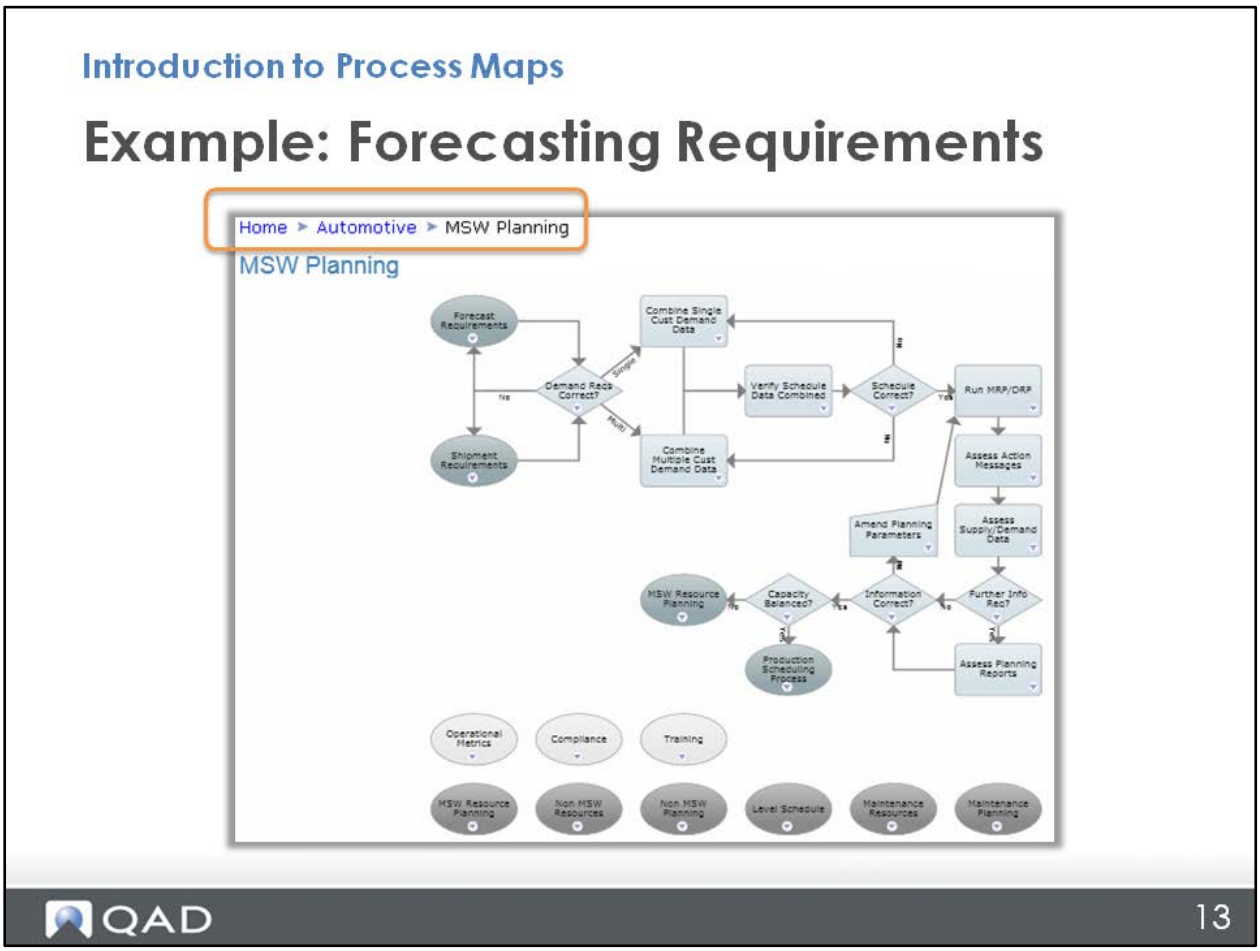
The system takes you to the MSW Planning map, where you can manage the planning process. Then, if you want to run MRP, click the Run MRP/DRP node.

Example: Net Change Materials Plan



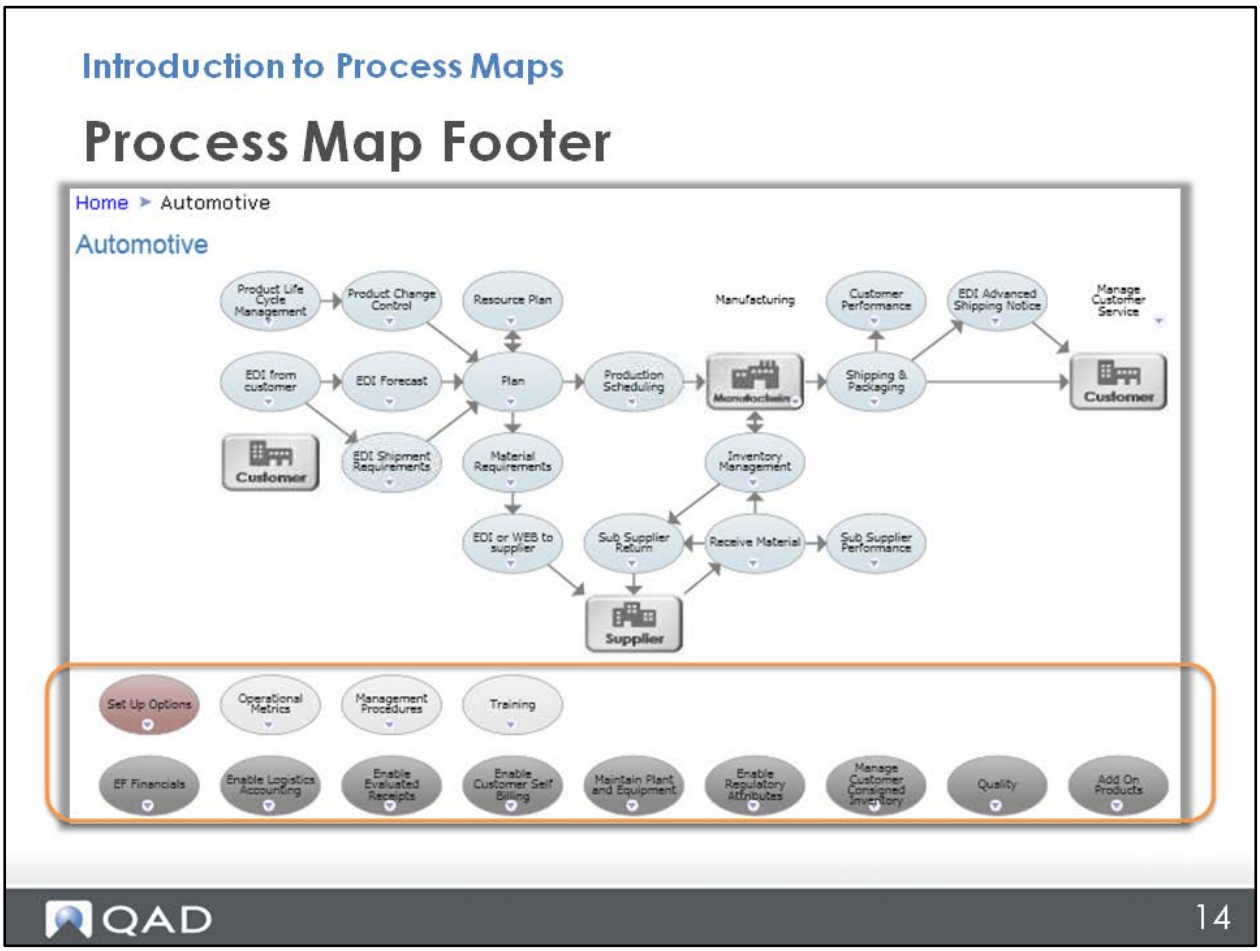
You are taken to the Net Change Materials Plan screen, which is where the task is performed.

Example: Forecasting Requirements



Notice the use of breadcrumbs at the top of the frame. This is helpful in reminding you where you are as you drill down into subprocesses and menus. You can always click one of those previous screen names to go back.

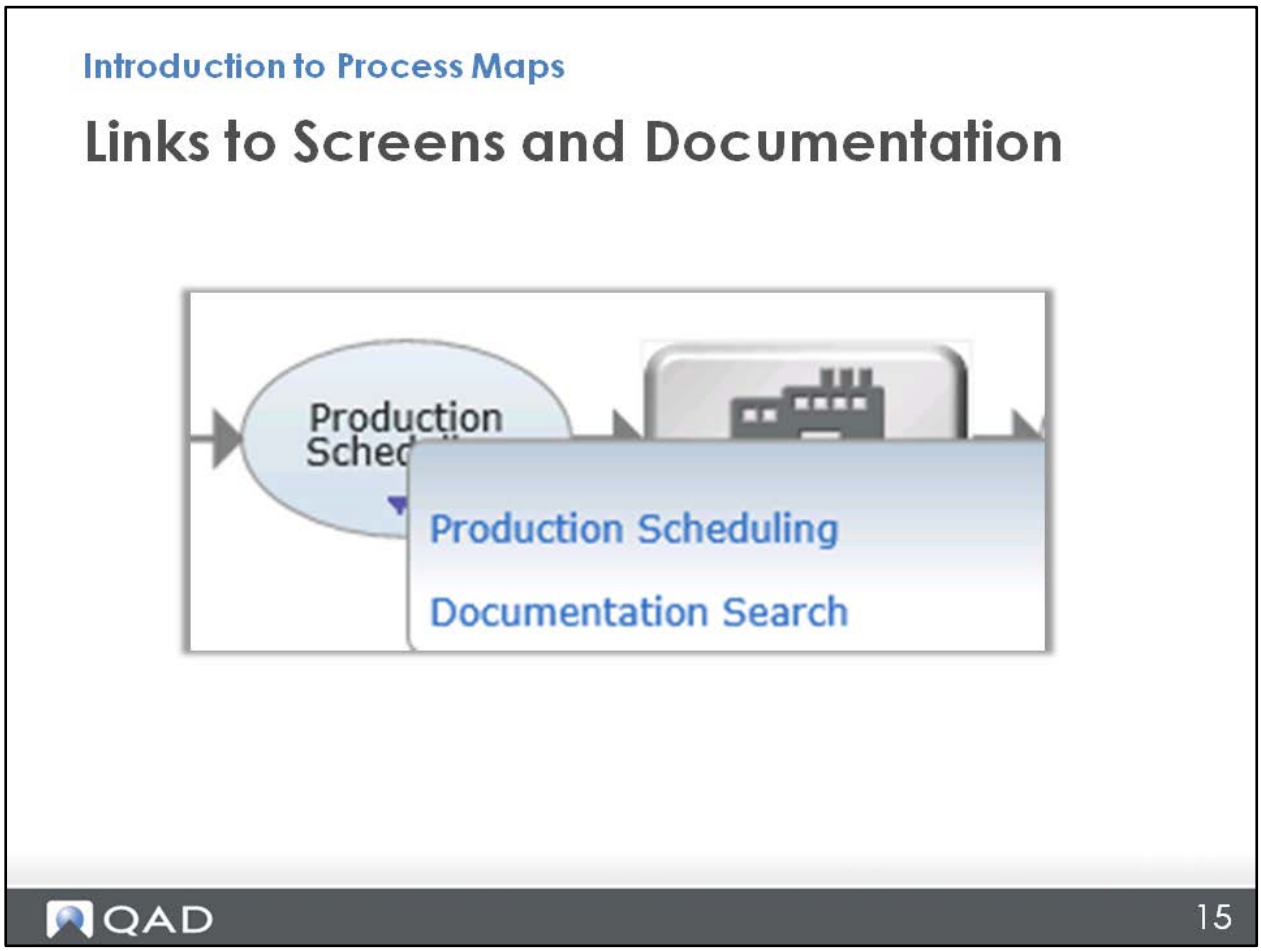
Process Map Footer



Back at the top-level Automotive process maps, you see a set of nodes at the bottom, called the *footer* section. This shows generic functional processes as opposed to industry-specific processes. Having these functional processes displayed shows you the wider potential of QAD. These may not be something you are currently using, but you *might* use them if you know they exist. In many cases, when the original system designer leaves the company, much of the system setup and capability knowledge leaves also. If the functional map nodes in the footers were not visible, new personnel or management may not be aware of what is available in the system.

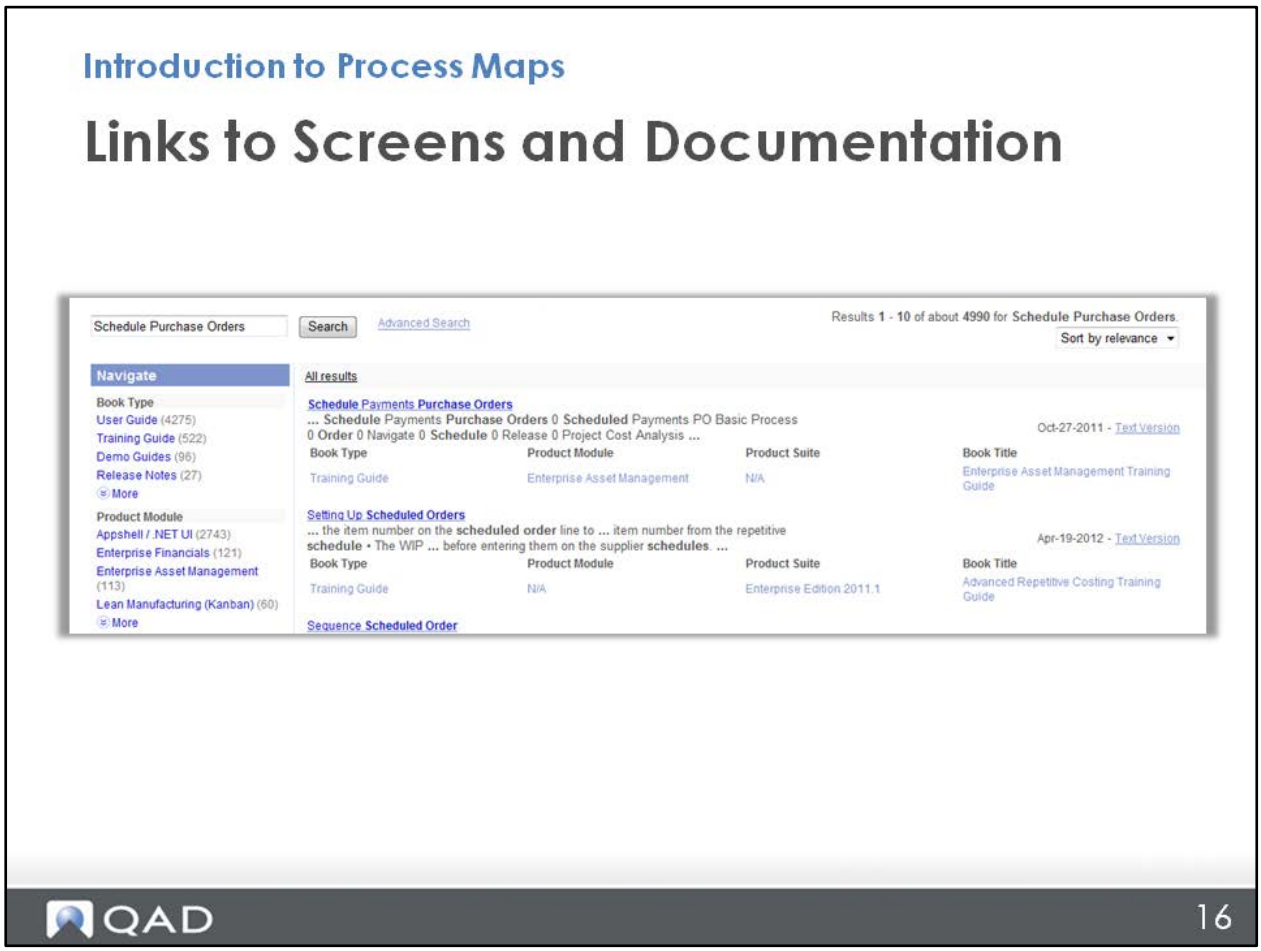
Bottom line: It is highly recommended that you keep the functional process map nodes visible.

Links to Screens and Documentation



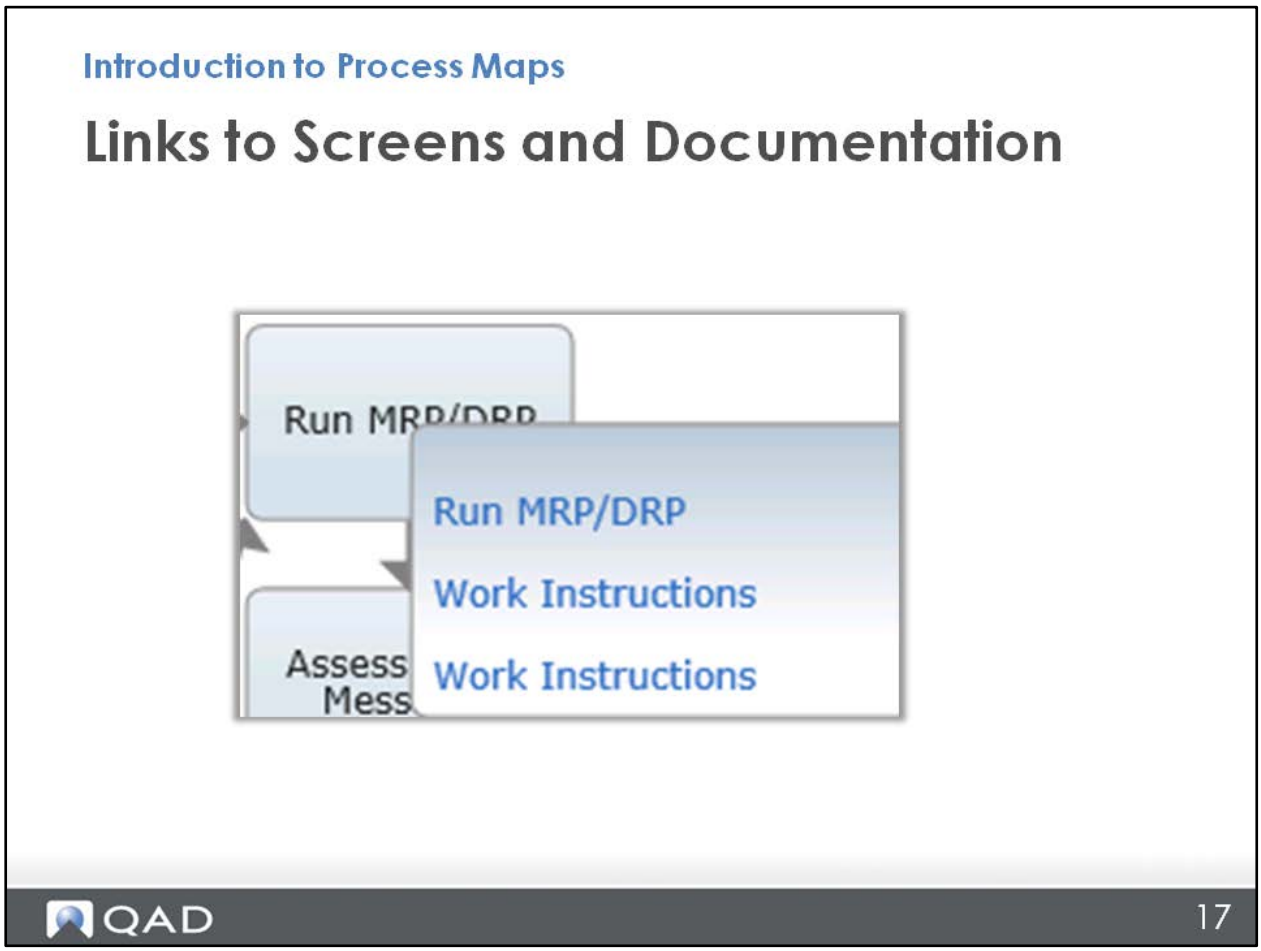
Beginning with EE2011.1, the links to the QAD screens and the Document Library were included in the process maps.

Links to Screens and Documentation



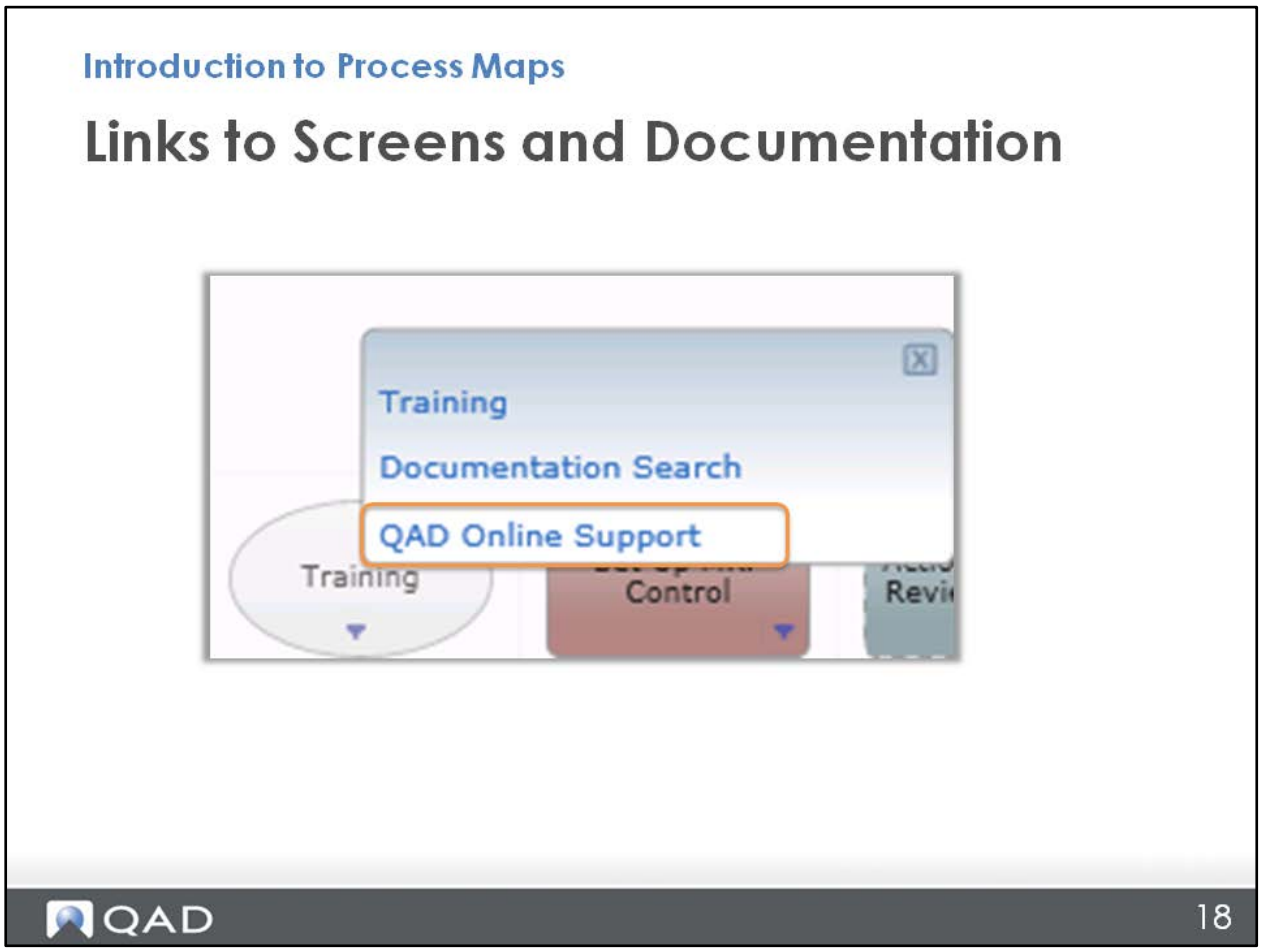
The Document Library is where you can find training and user guides, release notes, and other supporting information.

Links to Screens and Documentation



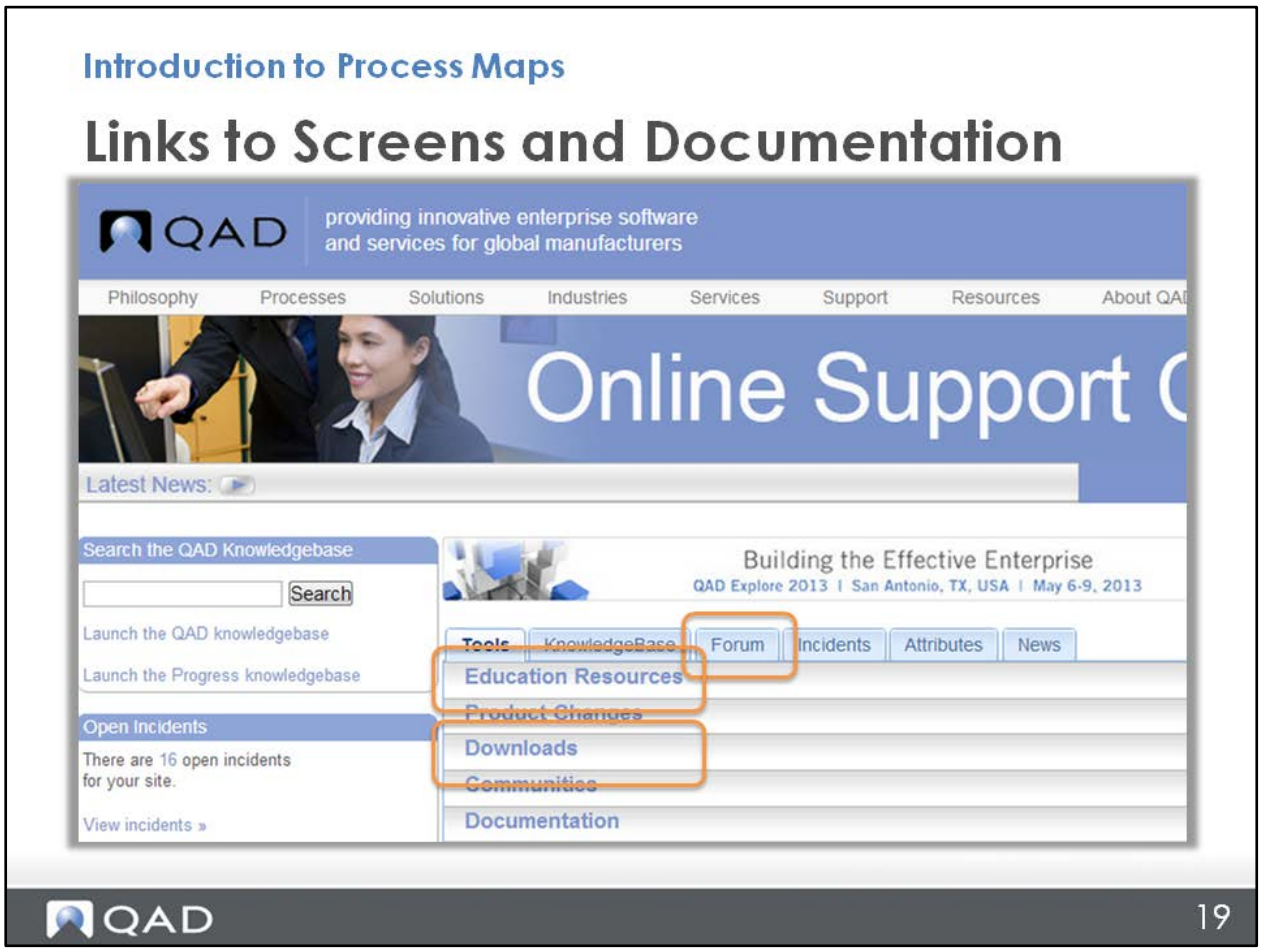
Beginning with EE2012, the EOB process maps were included, with links to supporting information such as work instructions.

Links to Screens and Documentation



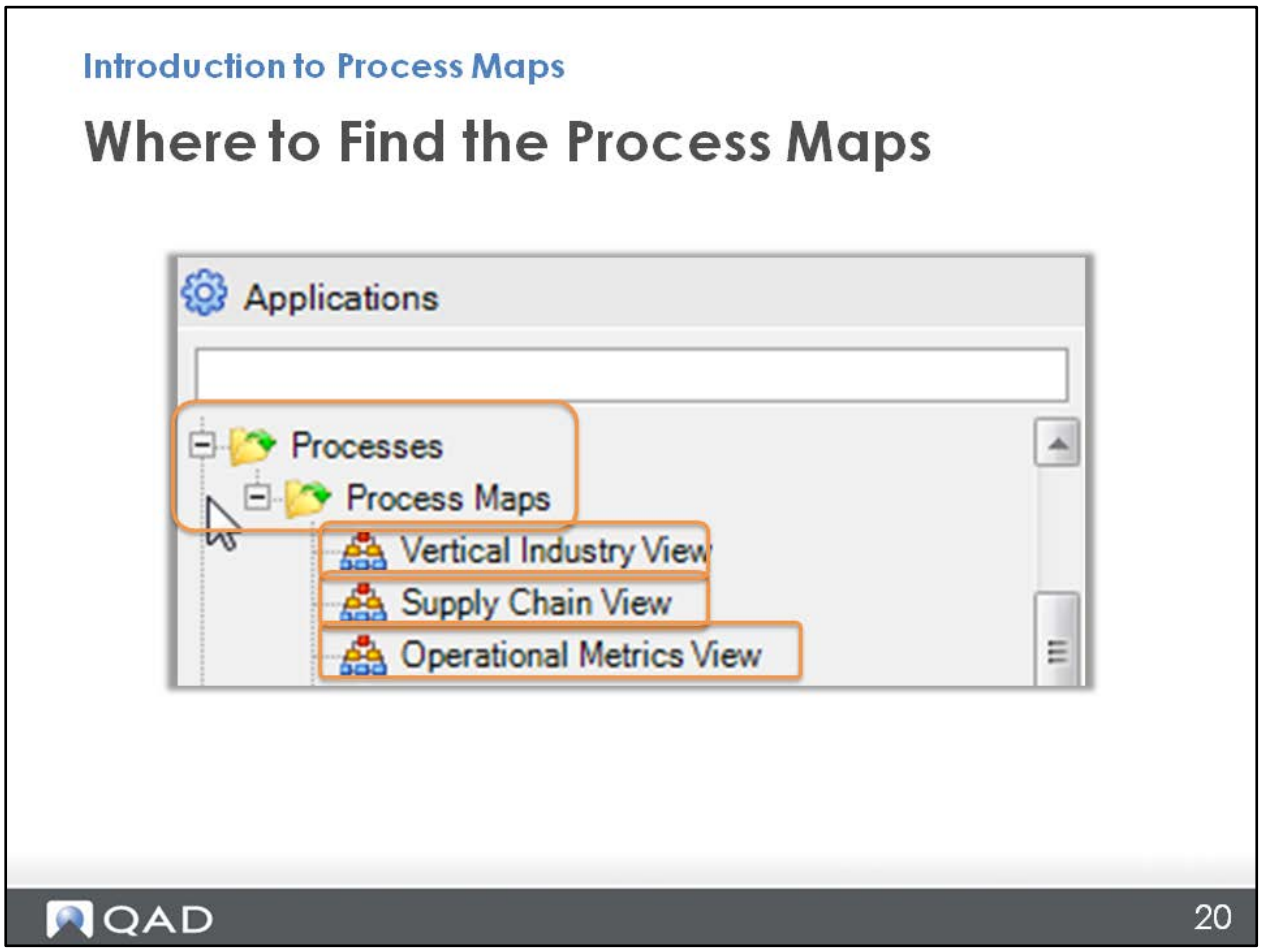
In earlier versions, you may need to add the links. Since you can have up to eight links on each node, you might add documentation such as PowerPoint presentations and Excel spreadsheets, or links to your own company's Intranet, other process maps, or external web sites.

Links to Screens and Documentation



For example, if you make a link to QAD Online Support, you are directed to QAD's Online Support Center website, where you can search Education Resources, access the QAD Store for downloads, and participate in QAD Forums.

Where to Find the Process Maps



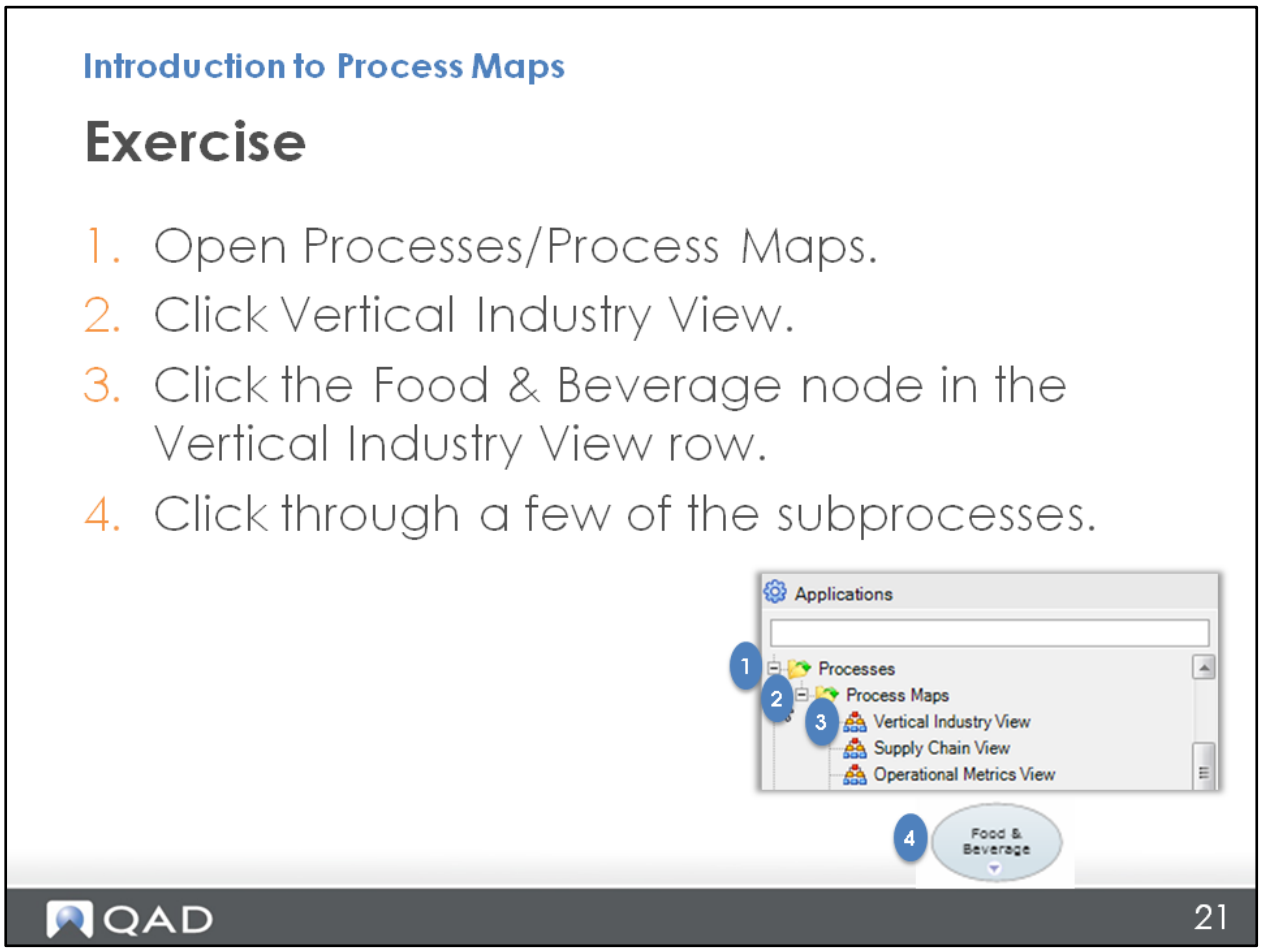
So, where do you find these process maps?

In the left menu under Processes, then the Process Maps folder.

As you see here, there are multiple predefined process views, including:

- Vertical industry
- Supply chain
- Operational metrics

Exercise

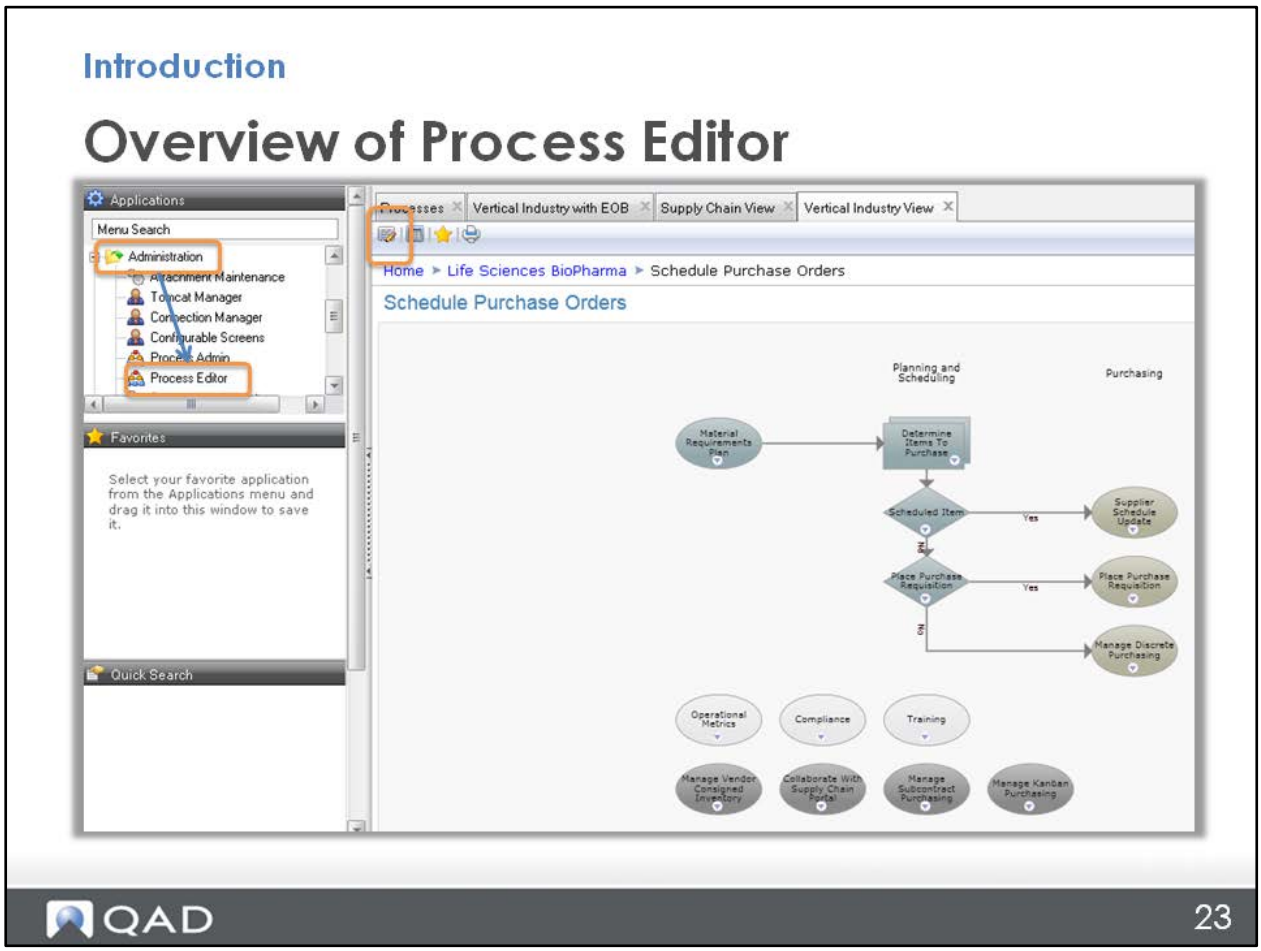


Before moving on to look at the Process Editor, do this brief exercise on navigating the process maps.

Process Editor

This topic discusses how to use the Process Editor.

Overview of Process Editor

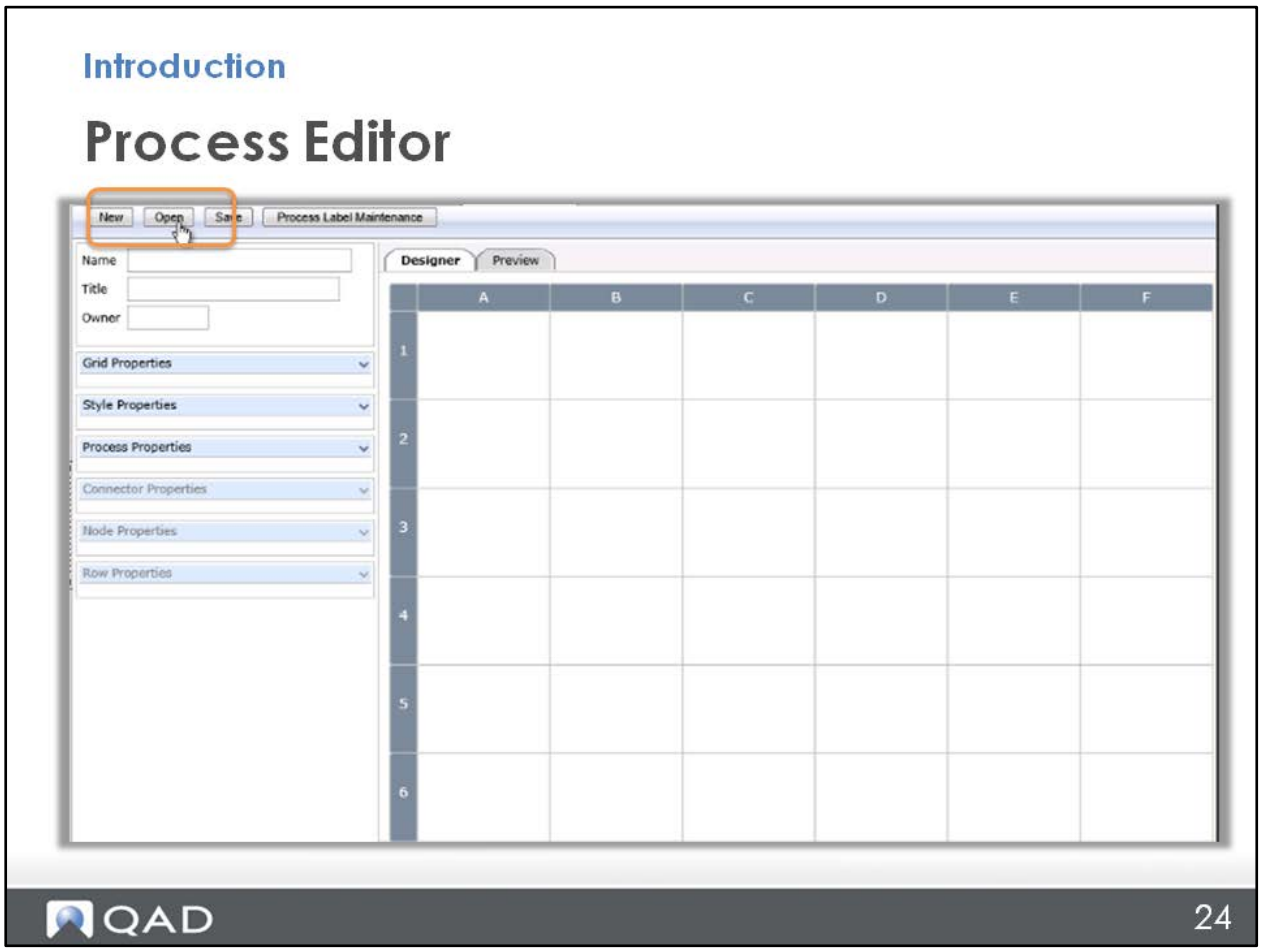


In your company, perhaps you do things a little differently than the standard QAD process – maybe you have a few different steps. For example, maybe you have an option to contact the Help Desk for assistance or to get authorization before proceeding to the next step.

You can customize the standard process map in the Process Editor, which you can open from any process map using this icon in the upper left. Or, you can open the Process Editor from the Administration menu on the left.

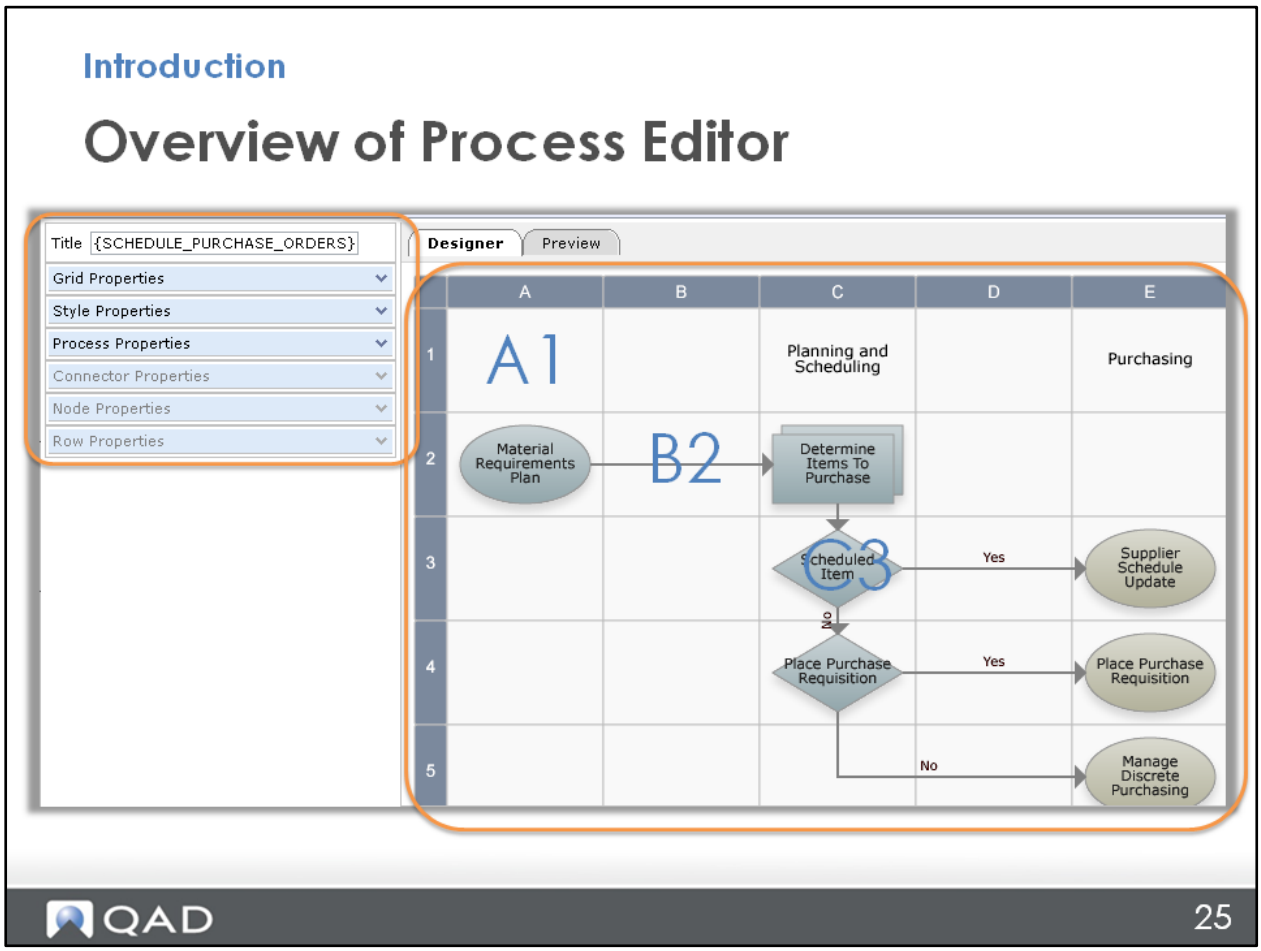
Note: You can also type "Process Editor" into the field at the top of the menu to search for it. If you are going to use the Editor a lot, you can drag the item down to your Favorites section, too.

Process Editor



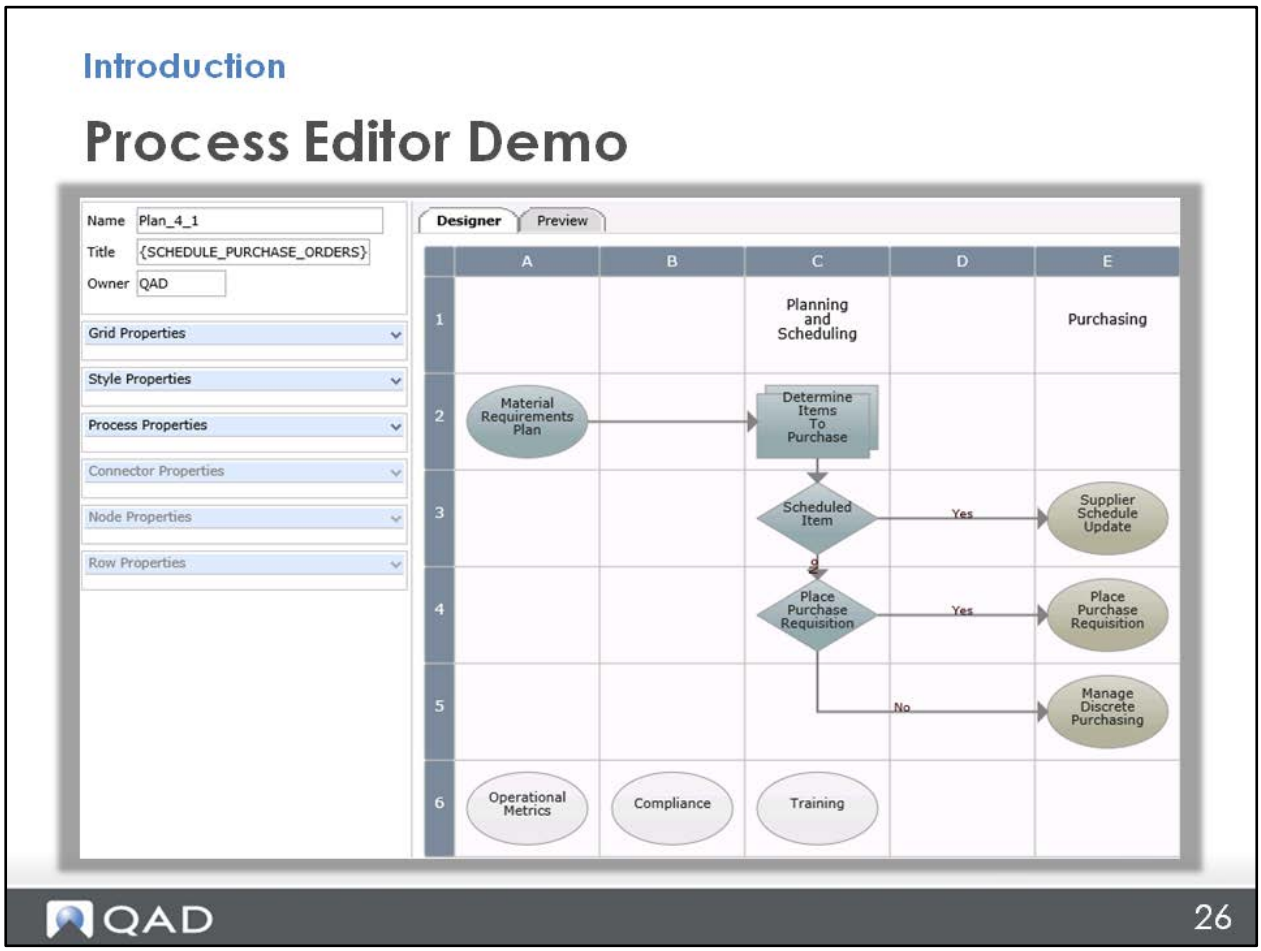
Open the map using the button in the upper left.

Overview of Process Editor



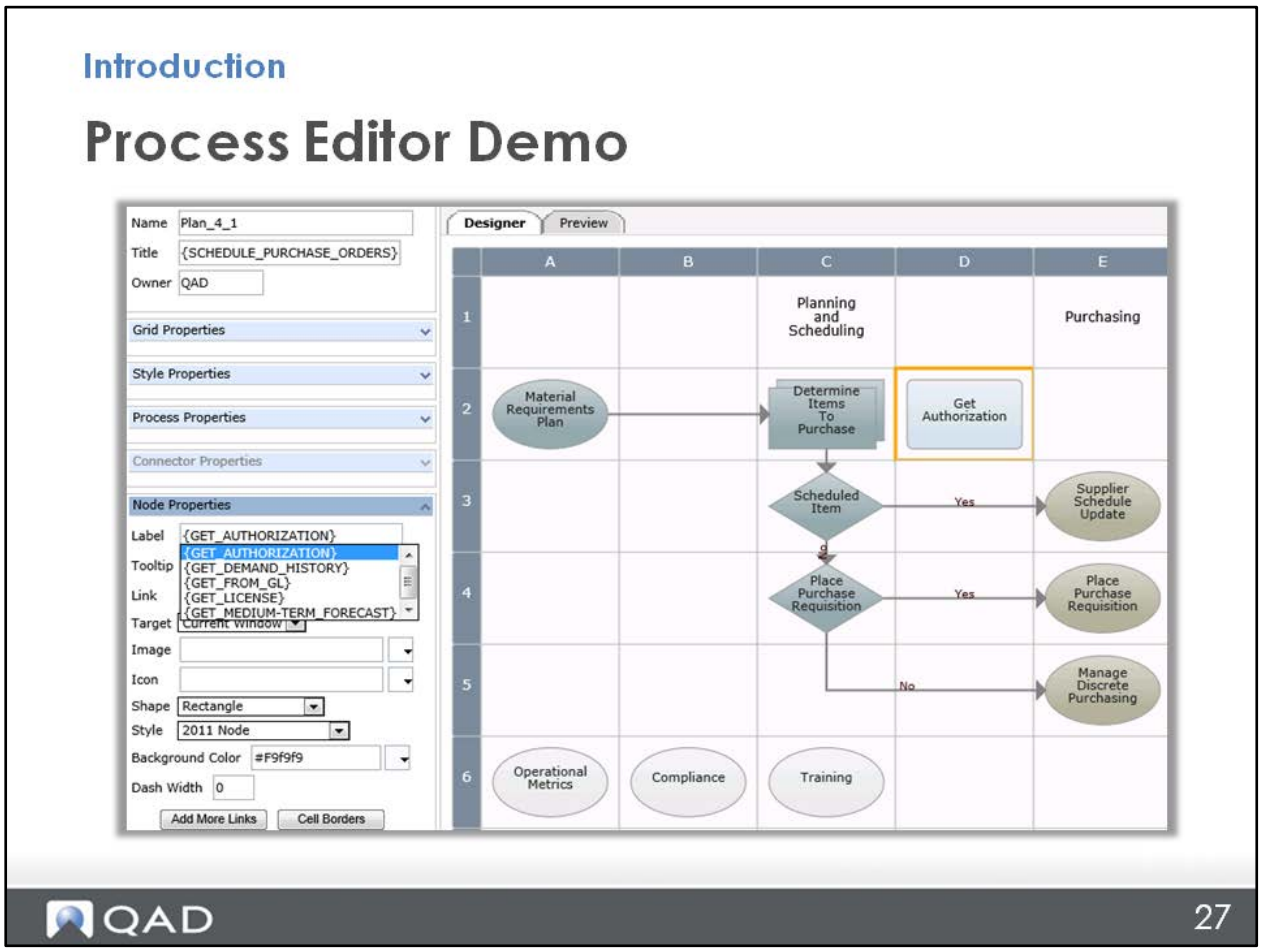
As you see, the Process Editor is a grid with cells where you set everything up, much like an Excel spreadsheet (A1, B2, C3, and so on). As you click in the cells, the menu options open on the left for arranging the grid, nodes, connectors, and links.

Process Editor Demo



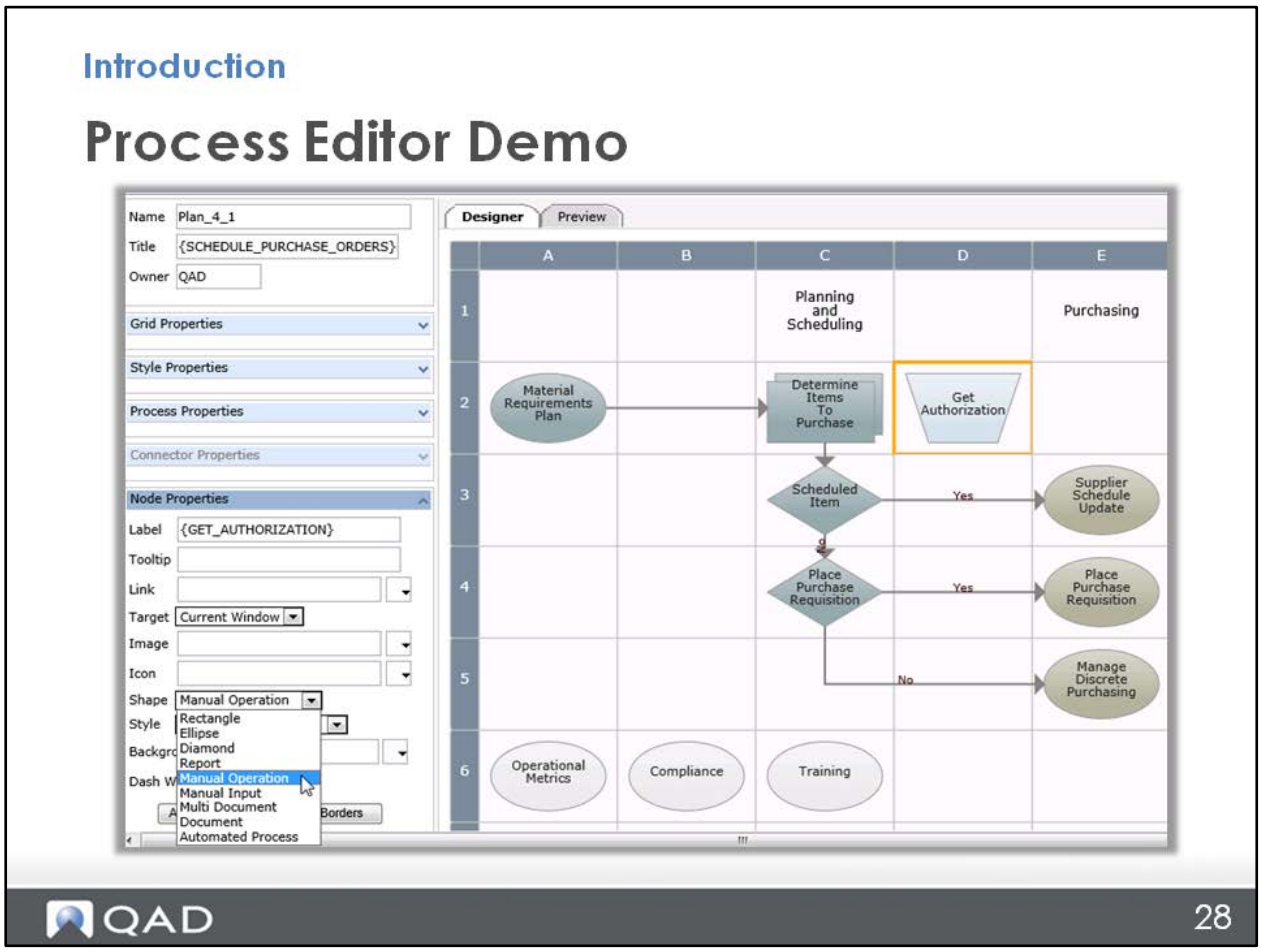
This example shows how to modify an existing QAD process map for scheduling purchase orders.

Process Editor Demo



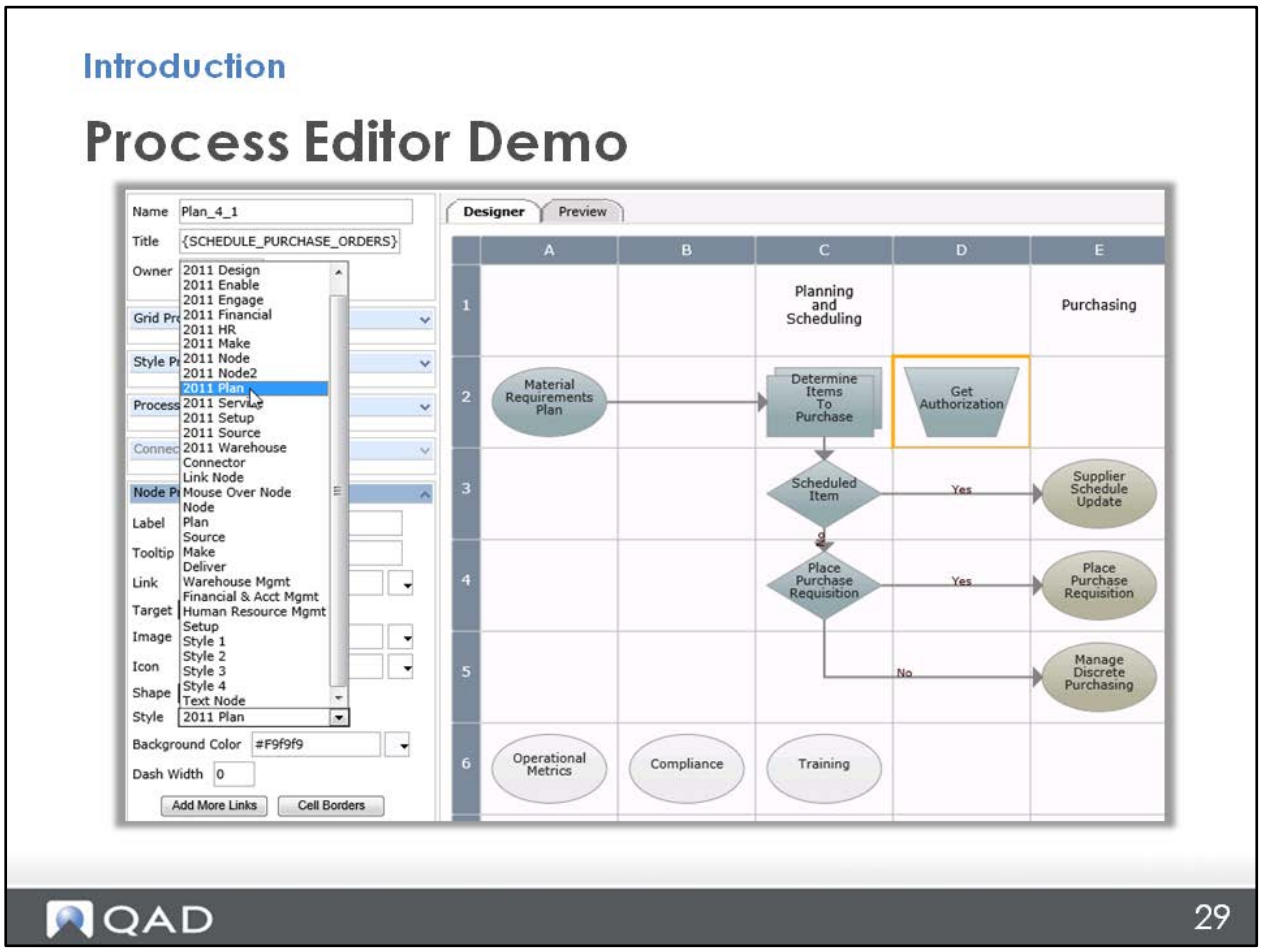
This example adds a node for “Get Authorization.”

Process Editor Demo



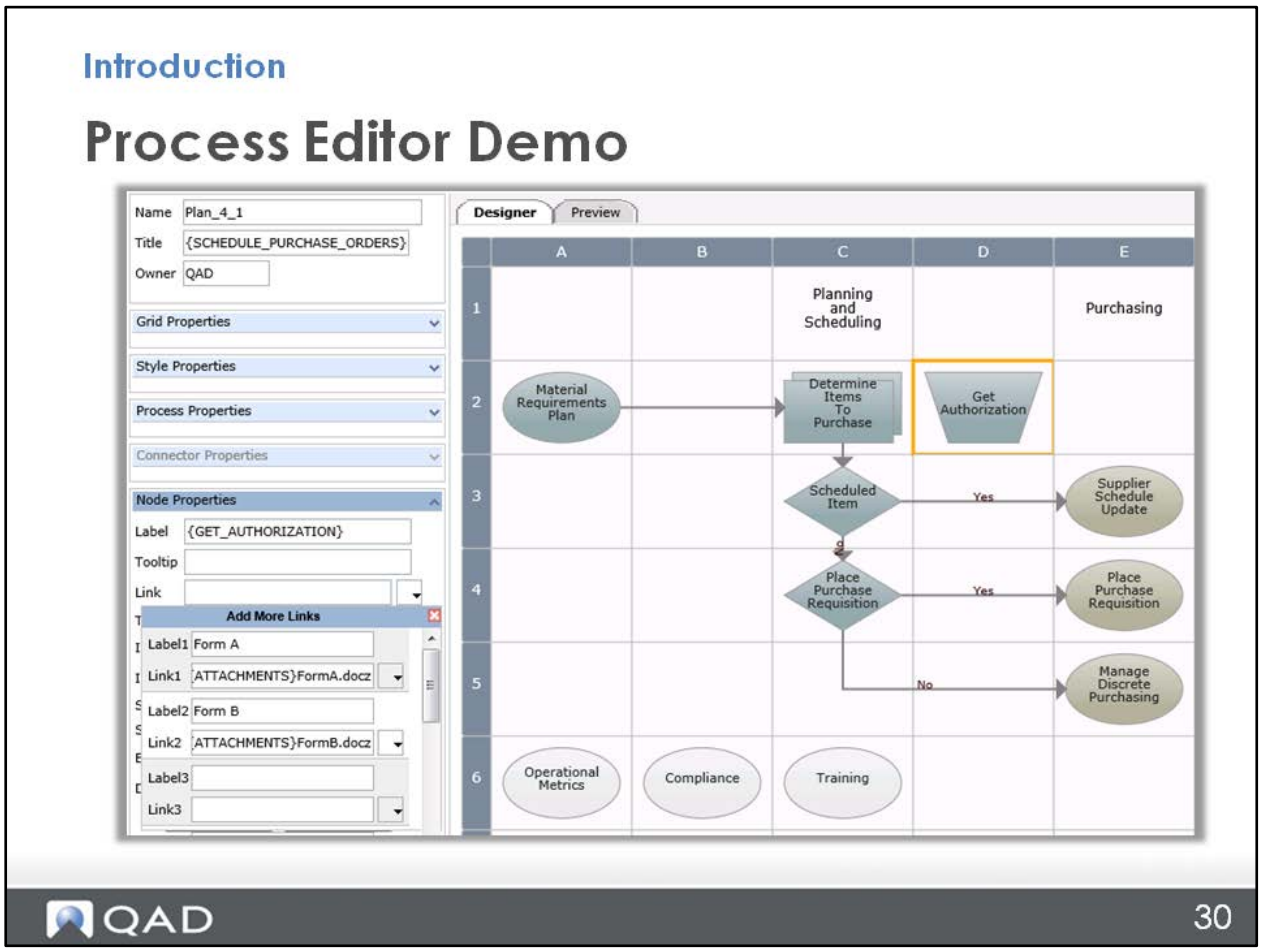
Next, change the shape of the node to signify a manual operation.

Process Editor Demo



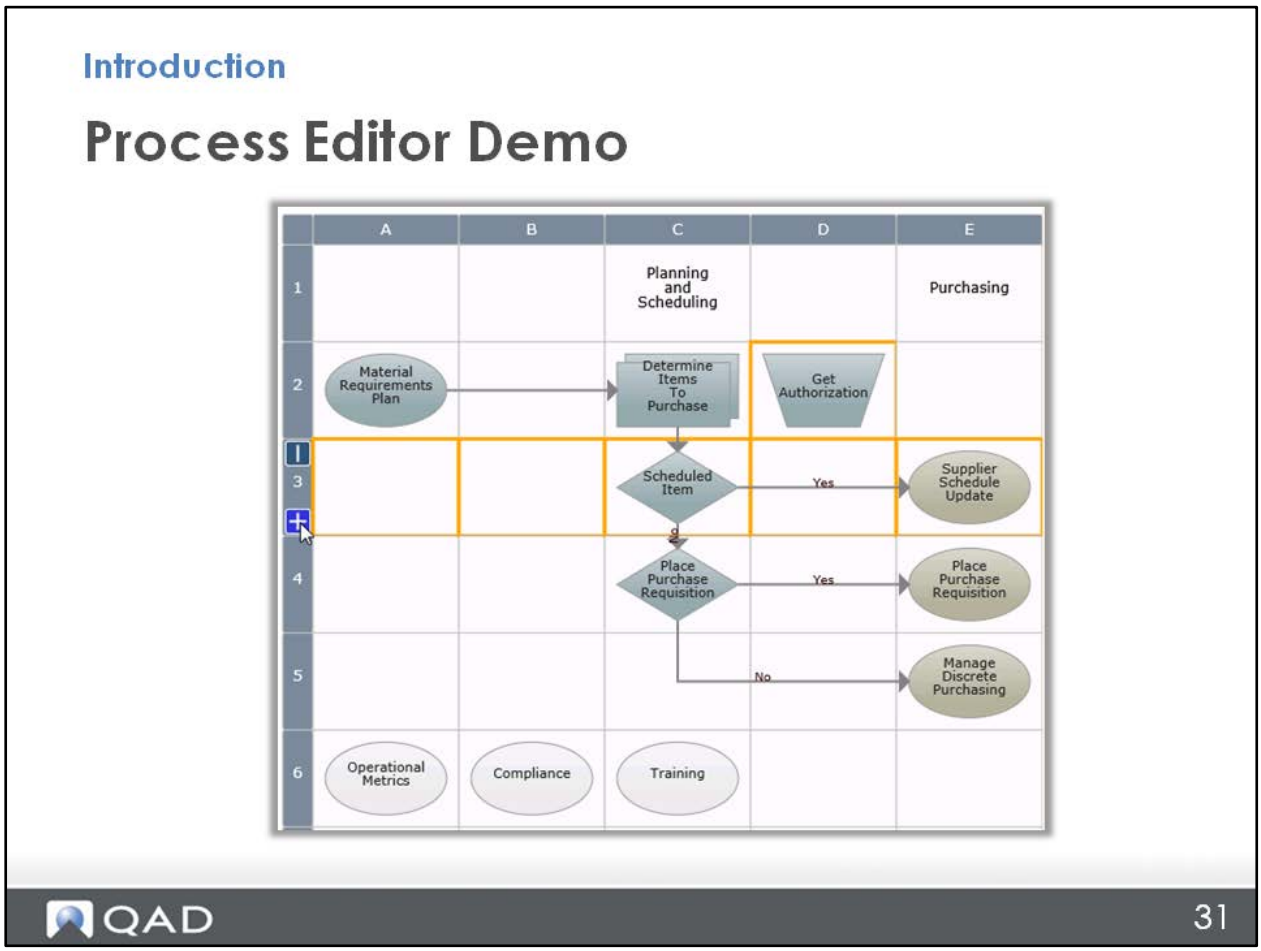
And change the style to match the rest of the map; in this case, the 2011 Plan style.

Process Editor Demo



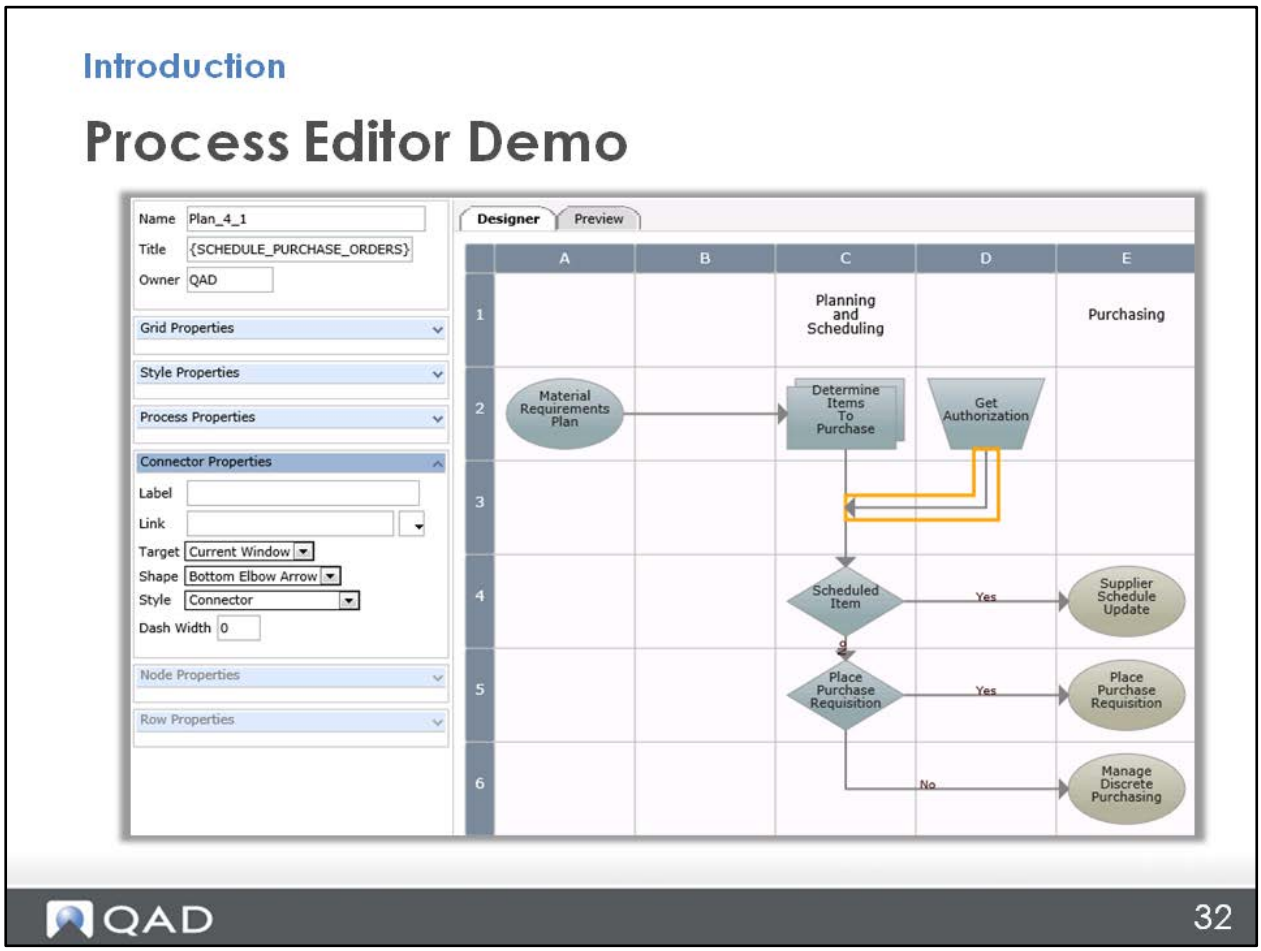
Next, add links to some forms to fill out and submit.

Process Editor Demo



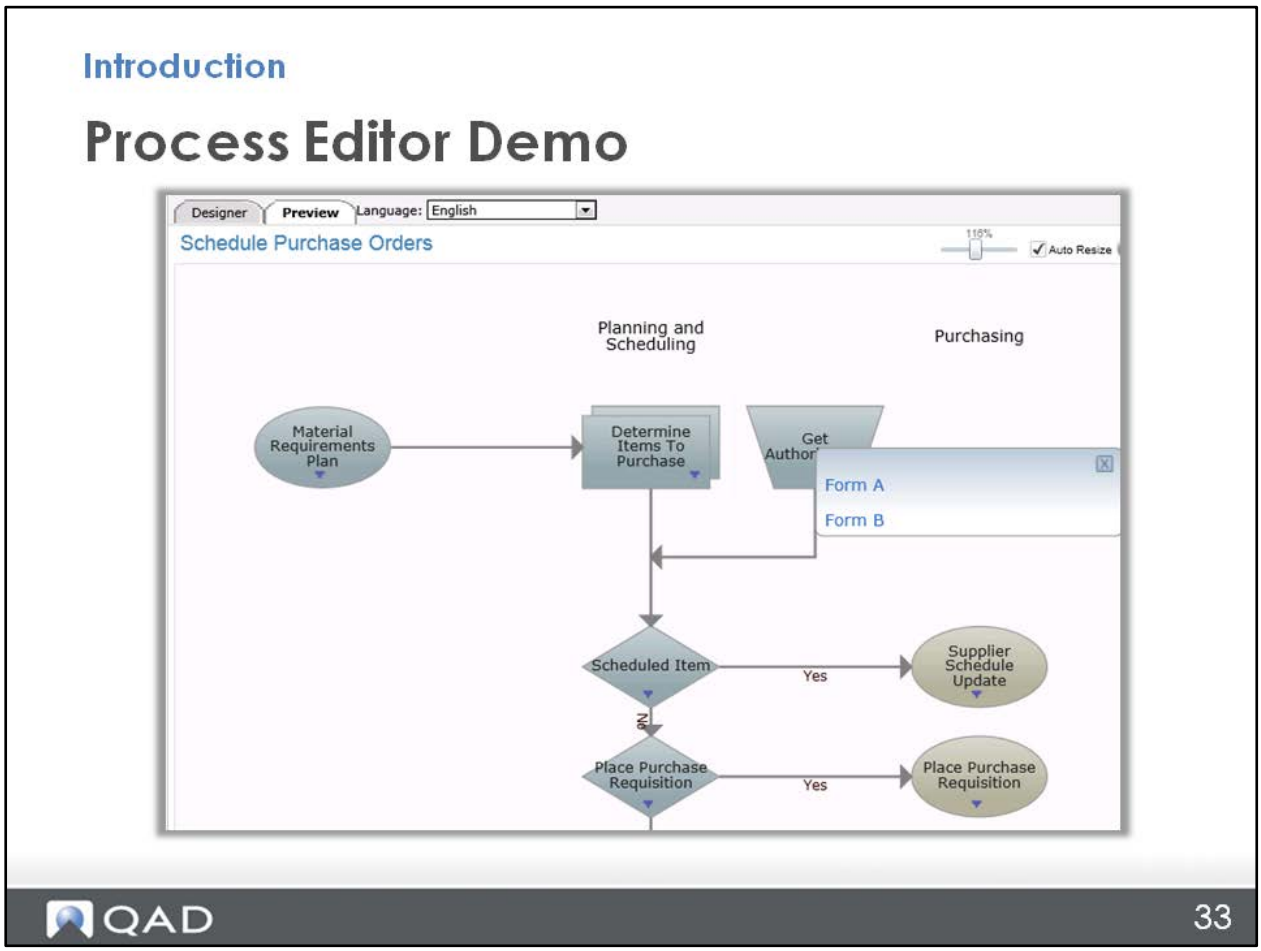
Then, add a row to give yourself a little more room for design.

Process Editor Demo



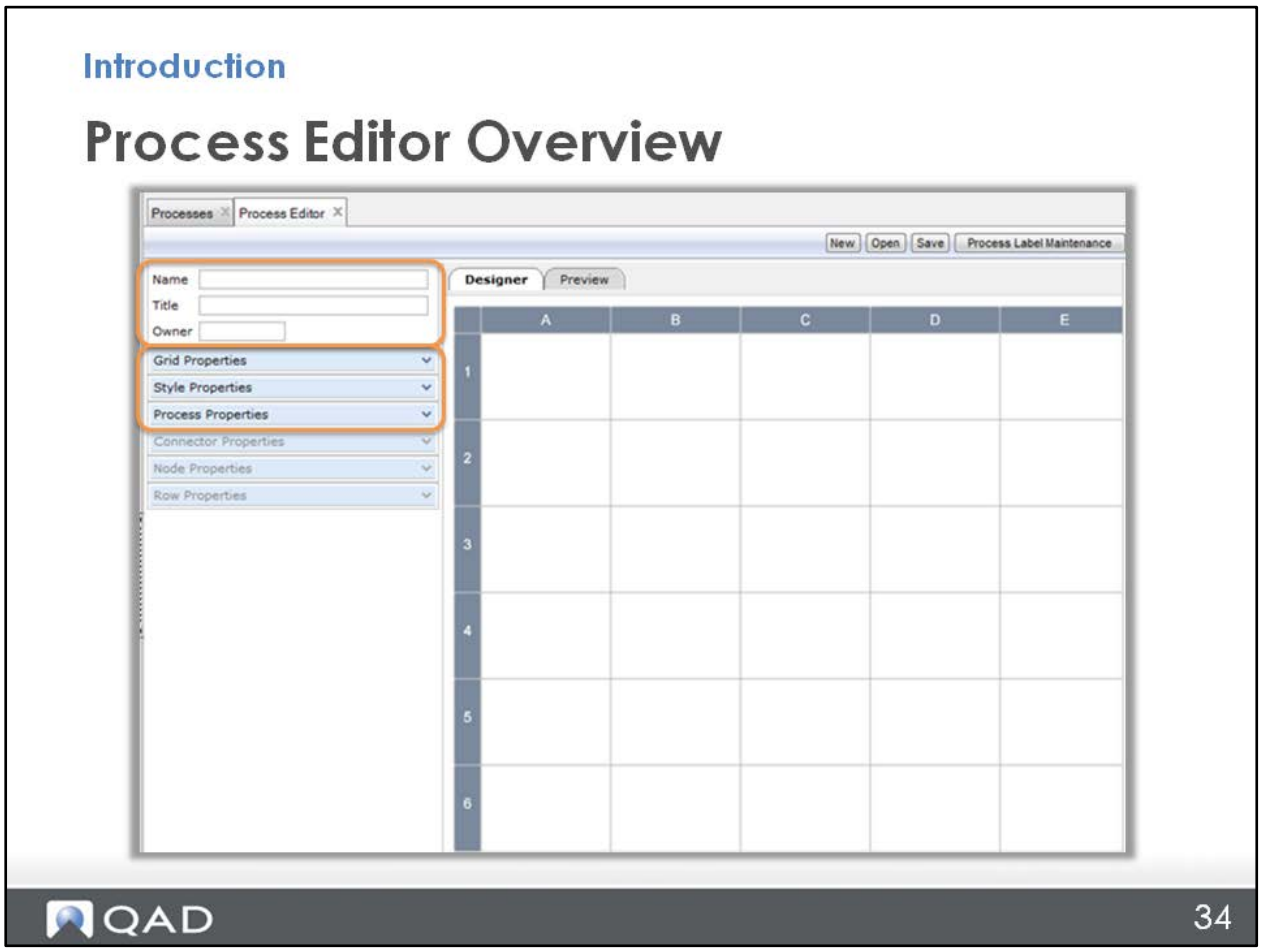
And then add an elbow connector.

Process Editor Demo



Here is a preview of the changes, showing the links to the forms.

Process Editor Overview



To make these edits, you use some of the menus on the left.

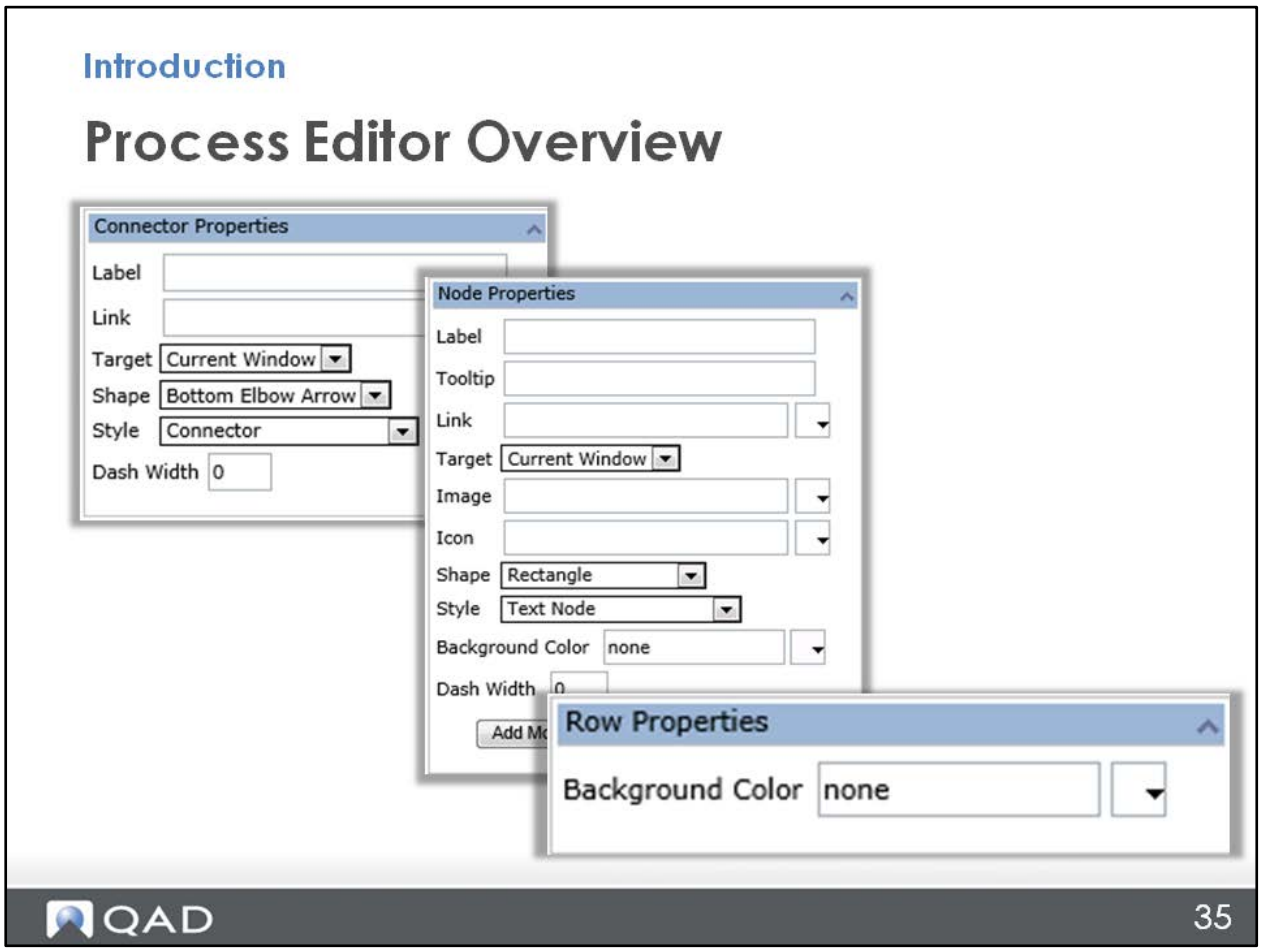
In the top section, you name the map.

In Grid Properties, you can adjust how many rows and columns there are. (You can also do it from the row or column headers using the plus or minus sign.) You can also change other properties like the row or column height and width.

In Style Properties, you can set up standard node styles. The default is a blue rectangle, but there are many more styles that have other shapes and colors. QAD has already provided a set of styles, so Style Properties would only be used if you wanted to add another one.

Process Properties is not something you typically use very often. It is also in another place called Process Admin, which is covered in a later section.

Process Editor Overview



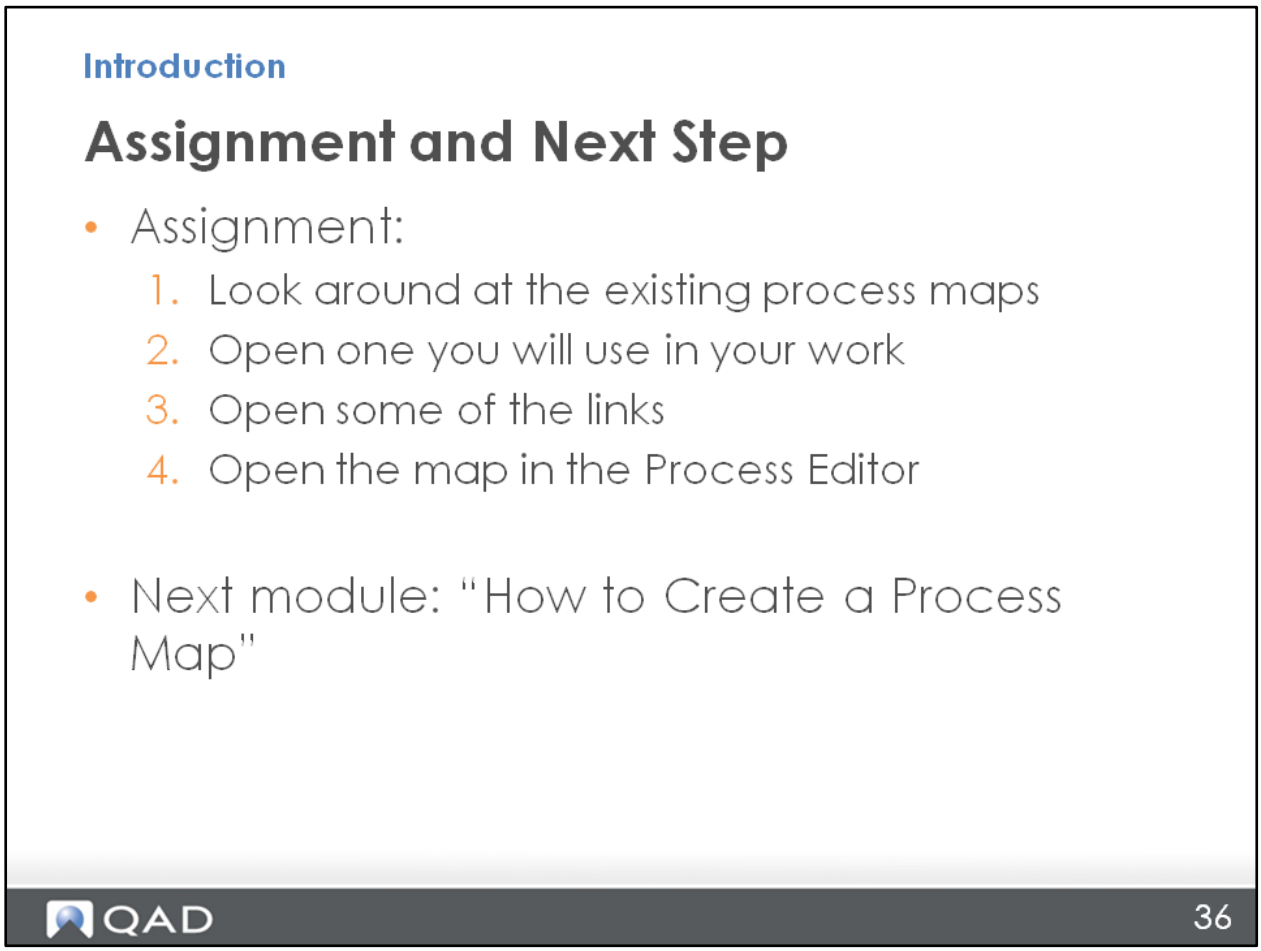
When you click a connector, the Connector Properties opens to let you choose the style of connector you want between nodes.

When you click a node, Node Properties opens to let you set up the node itself with a shape, color, and links.

When you click a row or column, the properties window opens to let you change the color of the whole row or column.

Later parts of the training provide more information about these properties.

Assignment and Next Step



Do this assignment to practice using the things you have learned so far:

1 - Open Processes/Process Maps and look around at the existing process maps.

2 - Search for and open a process map you would use in your daily work.

3 - Open some of the links.

4 - Open the process map in the Editor using the icon shown earlier (in the upper left of the screen).

Next, you will learn how to create a new process map. Even though most of your editing work will be done to existing maps, learning to create an entirely new process map, from a blank screen, will help you learn about the maps better, so editing them will be easier for you later, once you understand the basics.

CHAPTER 2

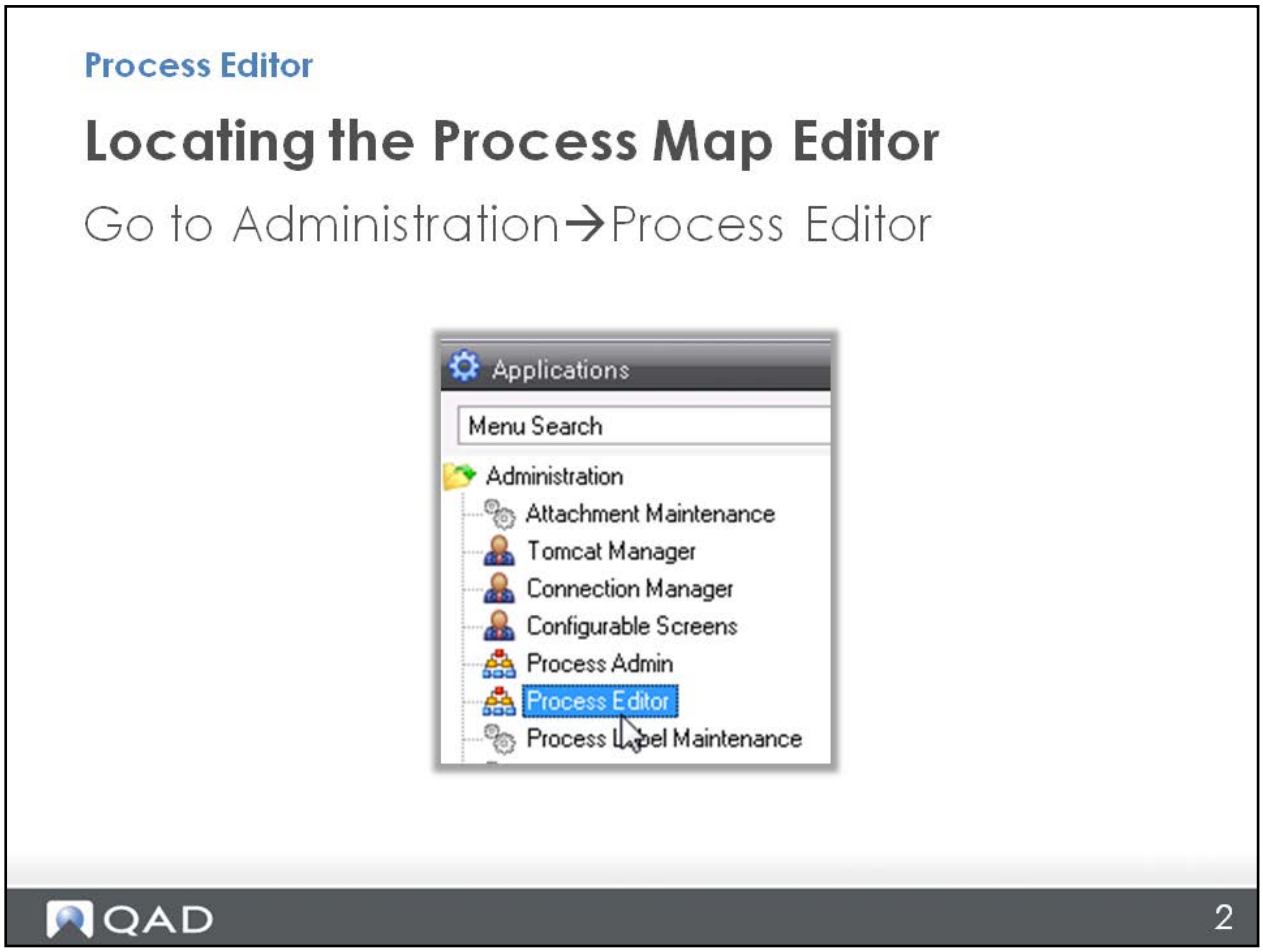
How to Create a Process Map

Since you will often be using a standard process map already available in QAD and then possibly modifying it to reflect your processes, you probably will not have to create a new map starting from a blank page very often. But this module shows how to create a new map from scratch – because that is a good way to learn everything about the Editor.

To watch a video of this section, go to the Learning Center (http://learning.qad.com) and use the Smart Search tab to search the key words: Process Editor. Take the Process Editor: How to Create a Map (2 of 9), Course #OLT-006840.

Or, if you are already logged into the Learning Center, just click here:
https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?id=22506432648

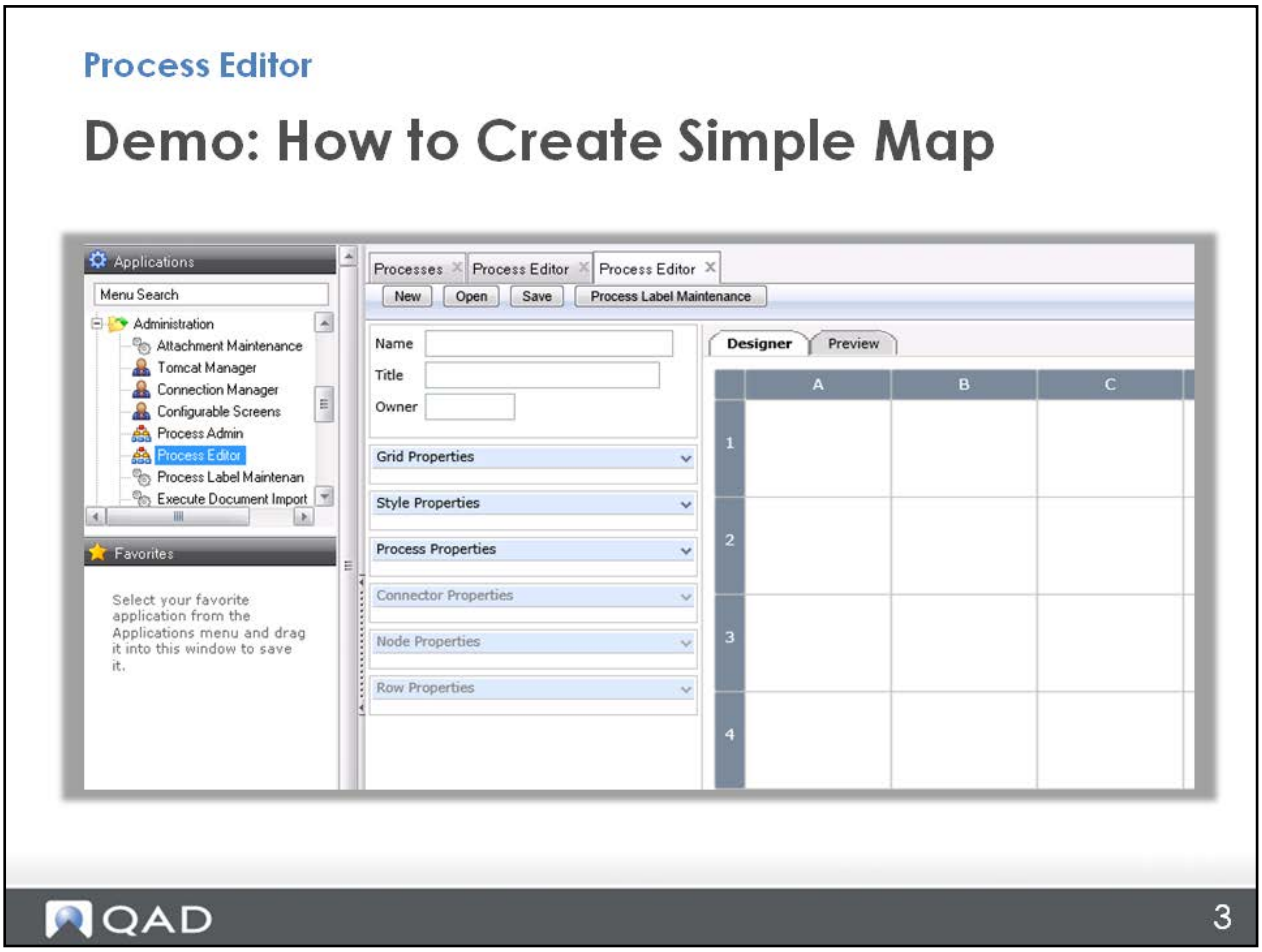
Locating the Process Map Editor



To begin, open the Process Editor from Administration/Process Editor, from the left menu.

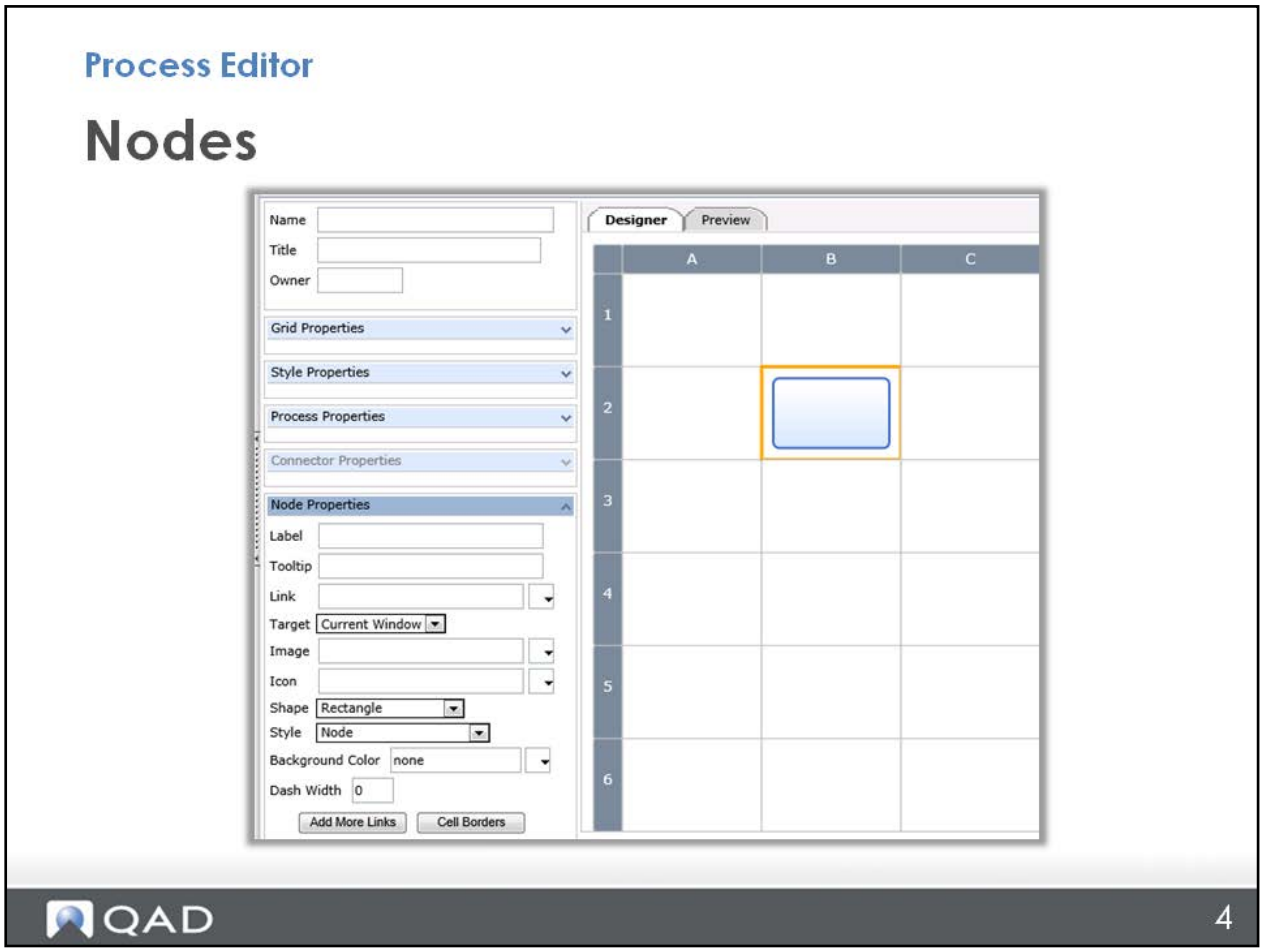
Note: You can also search for it in the menu search field at the top.

Demo: How to Create Simple Map



This brief demonstration creates a simple three-node process map, beginning from a blank grid.

Nodes

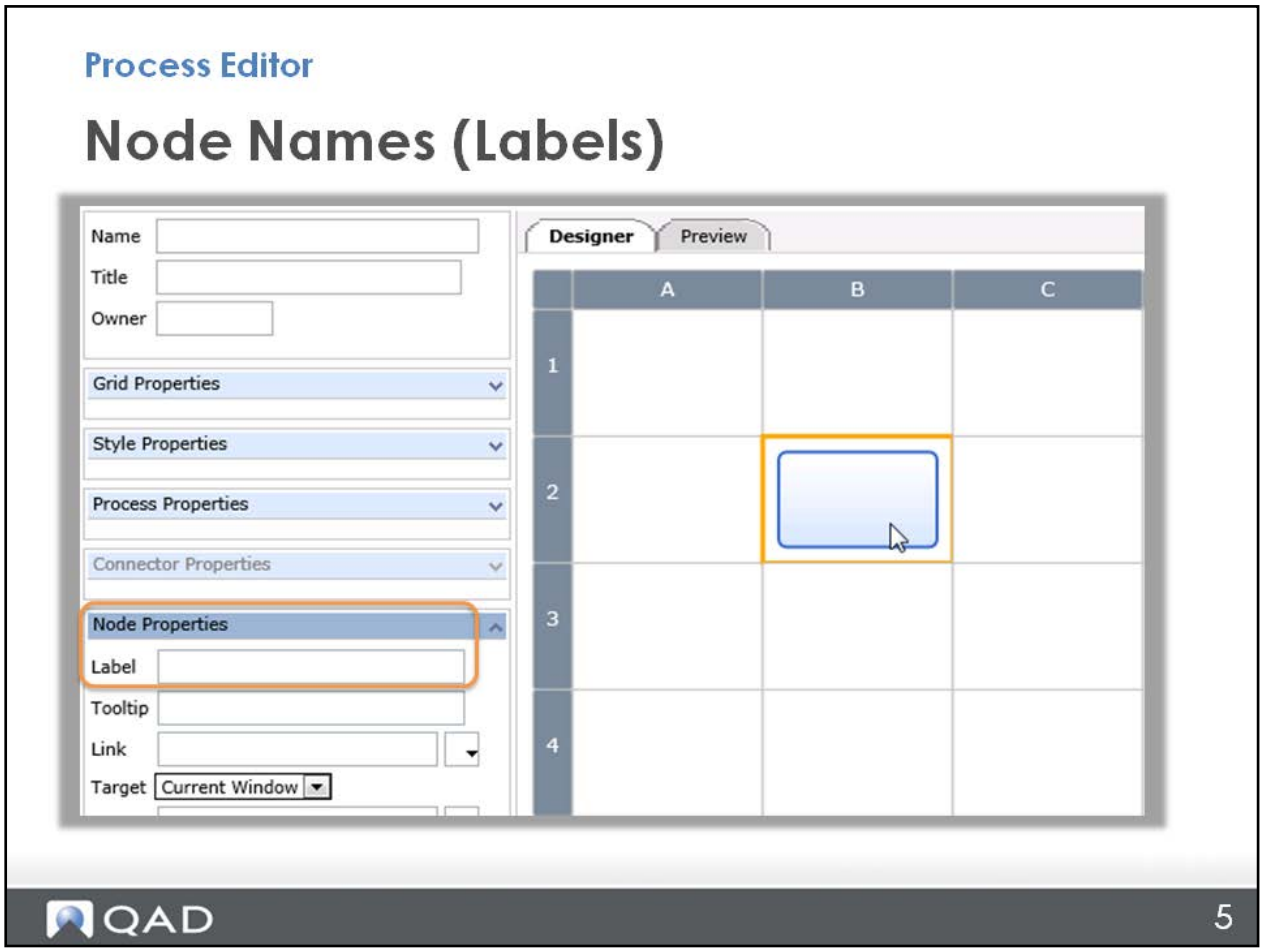


To create a node, you simply click a cell. The default node style is a blue rectangle.*

Later, you will learn how to make nodes of different shapes and colors, but for now, just use this. When you click the cell, the Node Properties section on the left side opens.

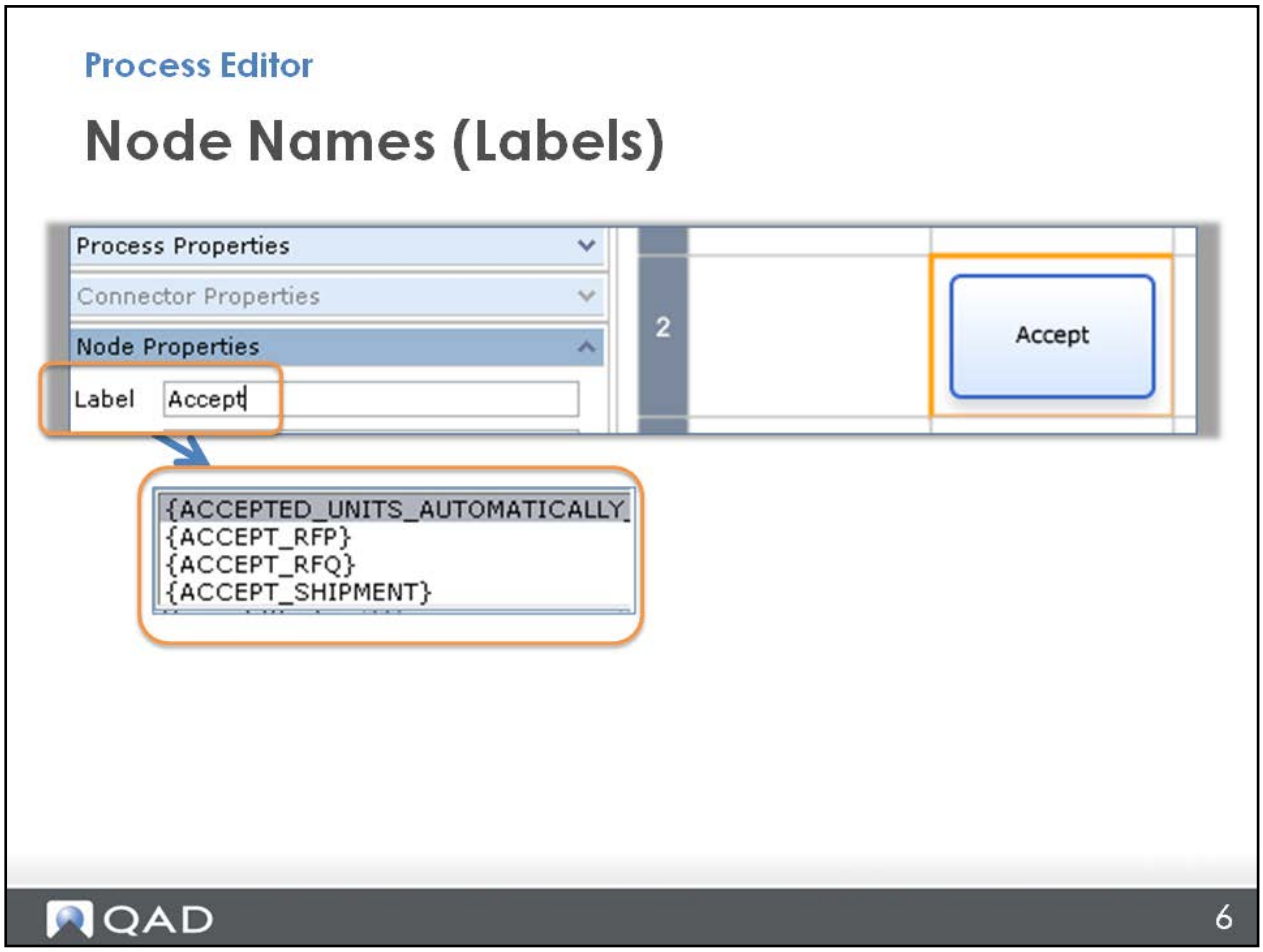
** If you get something other than the blue rectangle, look in Node Properties in the Style menu and choose the Node style.*

Node Names (Labels)



From there, name the node using the Label field. Rather than just creating any name you like, it is a good idea to search first to see if there is already a label name for what you are trying to set up. That way, you stay organized and do not end up with several similar labels representing the same thing.

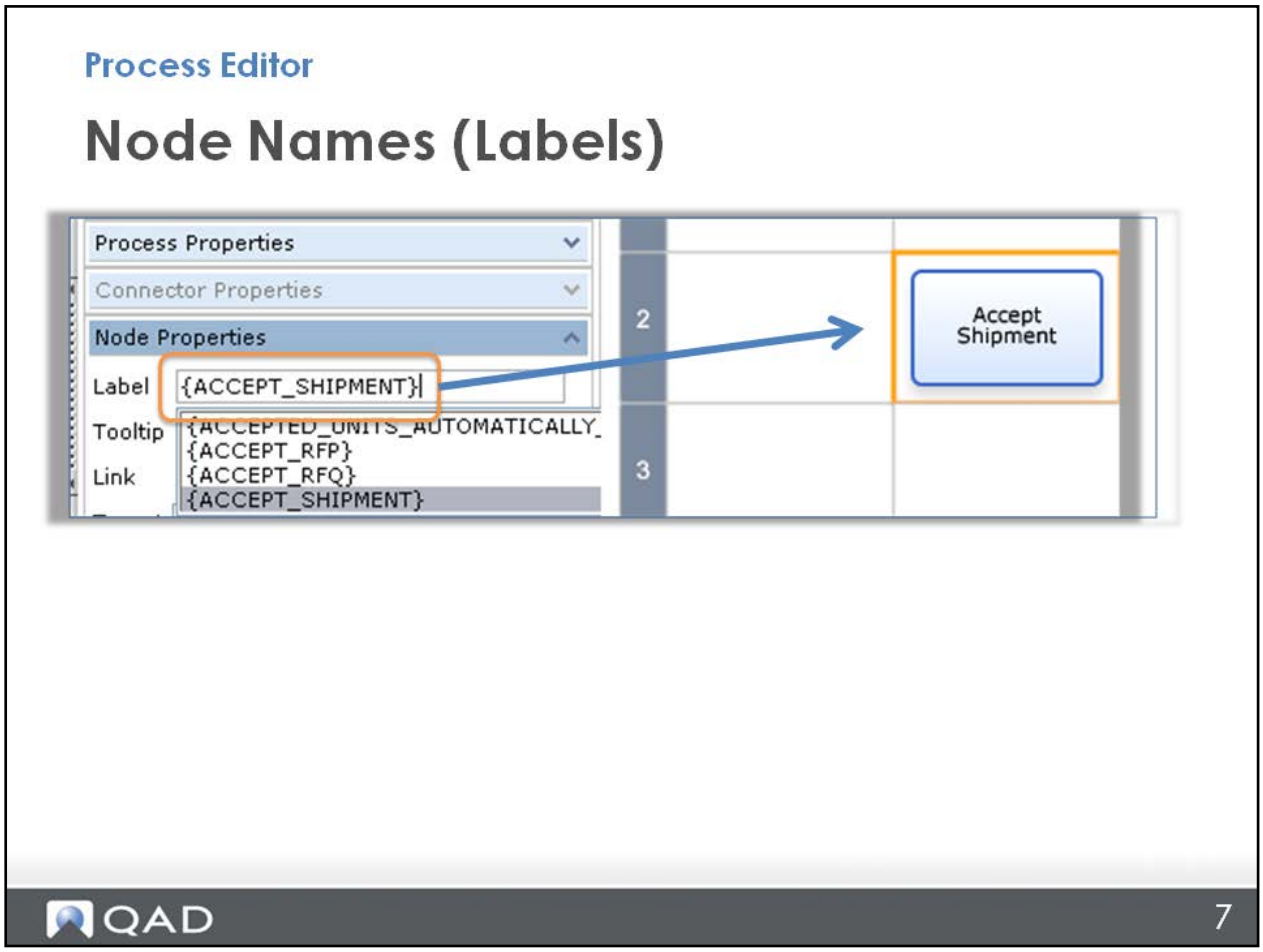
Node Names (Labels)



For this example, the node is labeled “Accept Shipment.”

So type in the first word, “Accept,” and then use the down arrow on the keyboard to open the menu of standard node names starting with the word “Accept.”

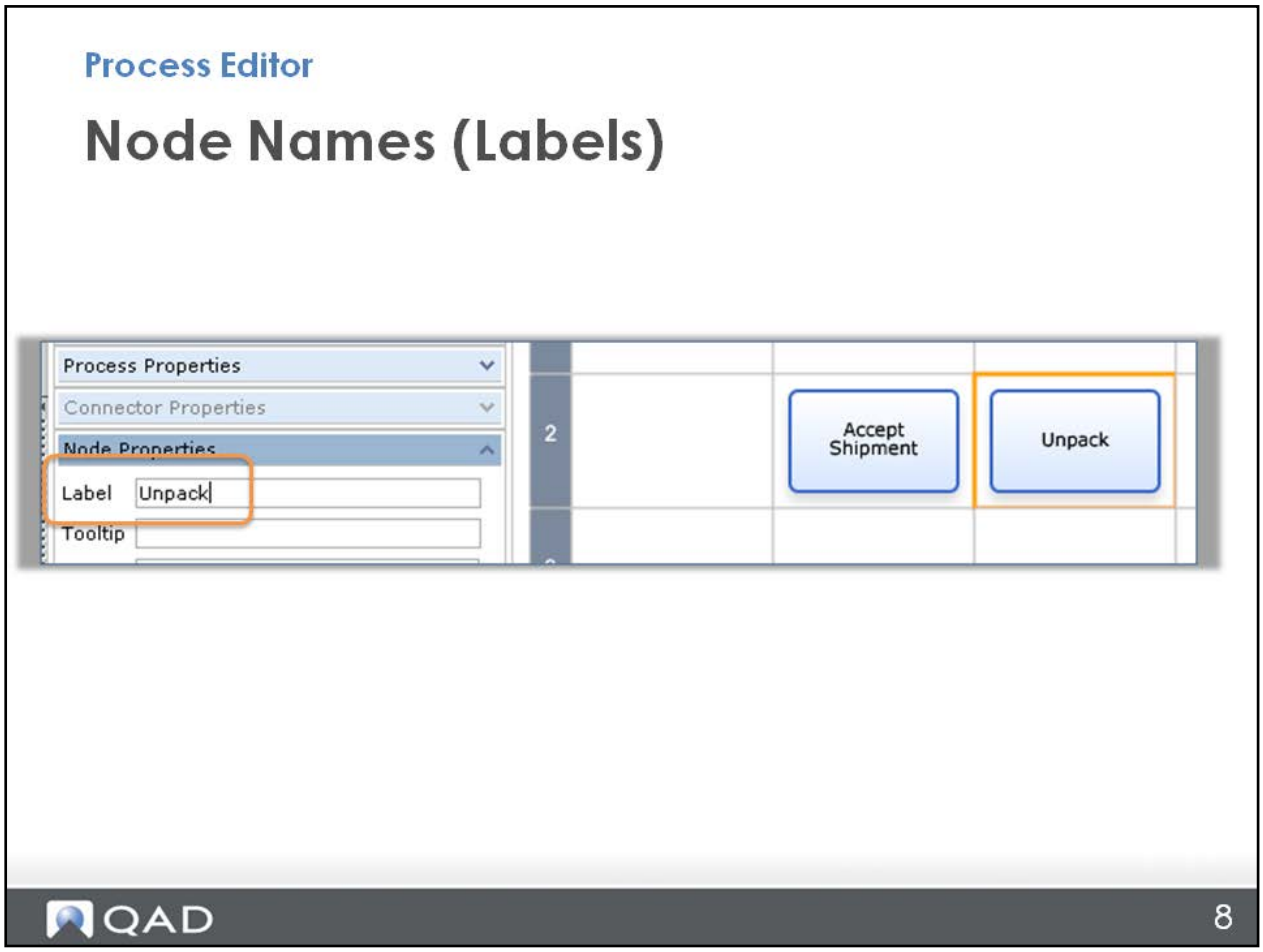
Node Names (Labels)



When you see what you want, {ACCEPT_SHIPMENT}, just choose it. You can see the words go into the node.

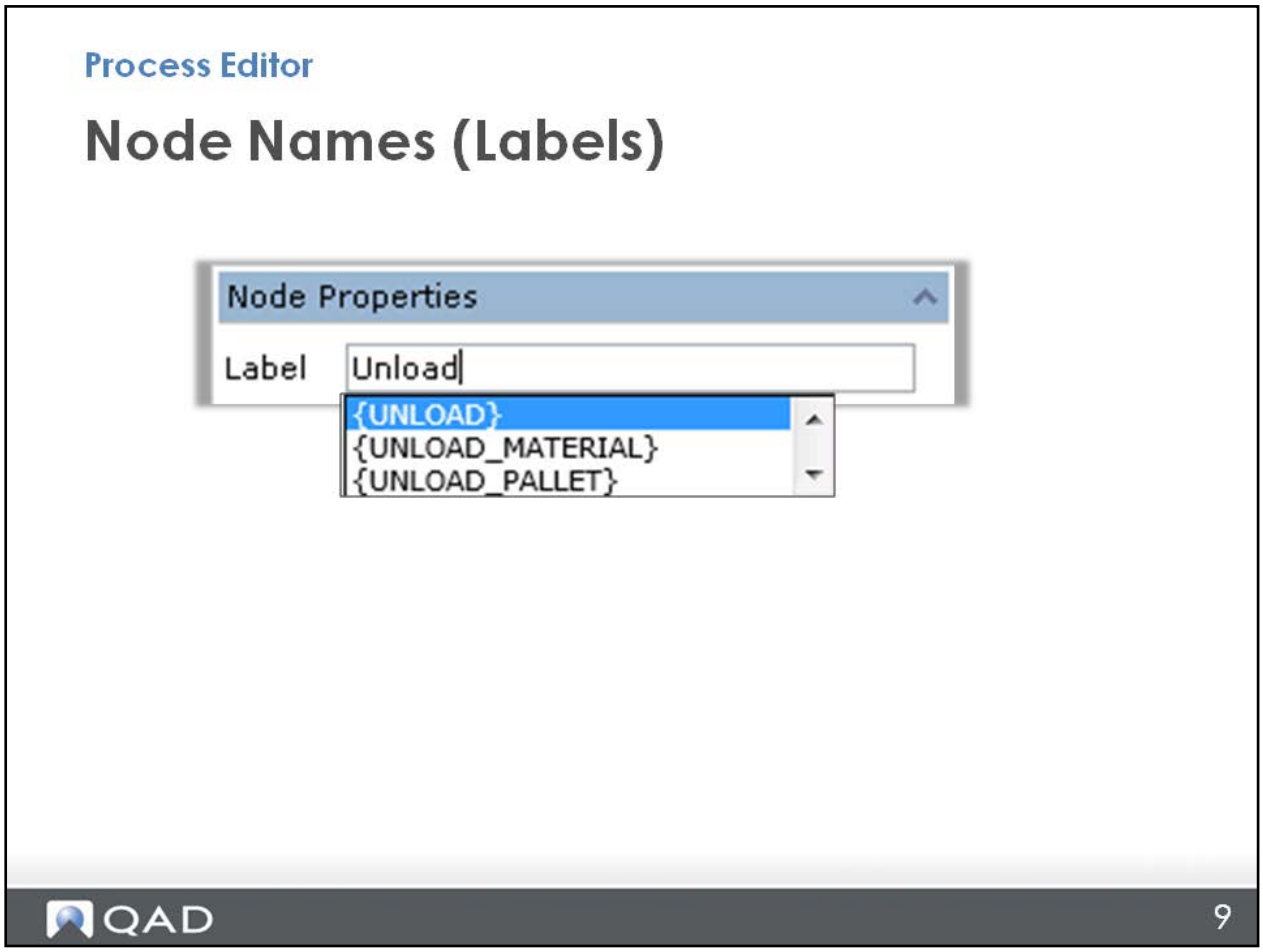
Note: Word order is important, so if you do not find the word you are looking for the first time, try a different first word.

Node Names (Labels)



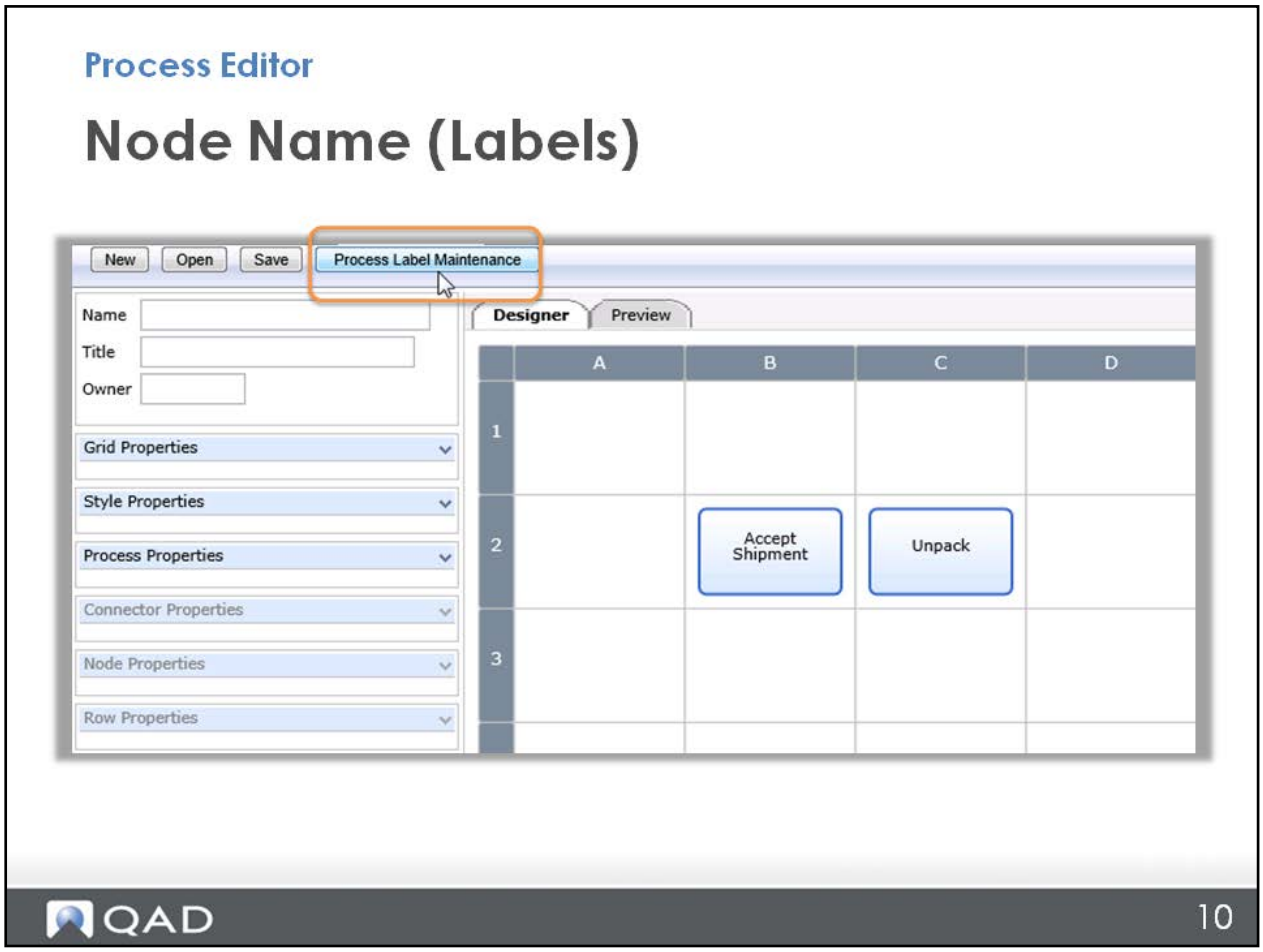
Now add a second node and look for the word “Unpack.” When you click the down arrow this time, you do not get any results, so you could just type it in. But consider searching for it another way in case there is something similar that would work. How about the word “Unload” ?

Node Names (Labels)



That word DOES appear in the list of existing labels, and it means the same thing. If you use “Unload,” that would keep your label names more organized and consistent, and that is the better way to do it.

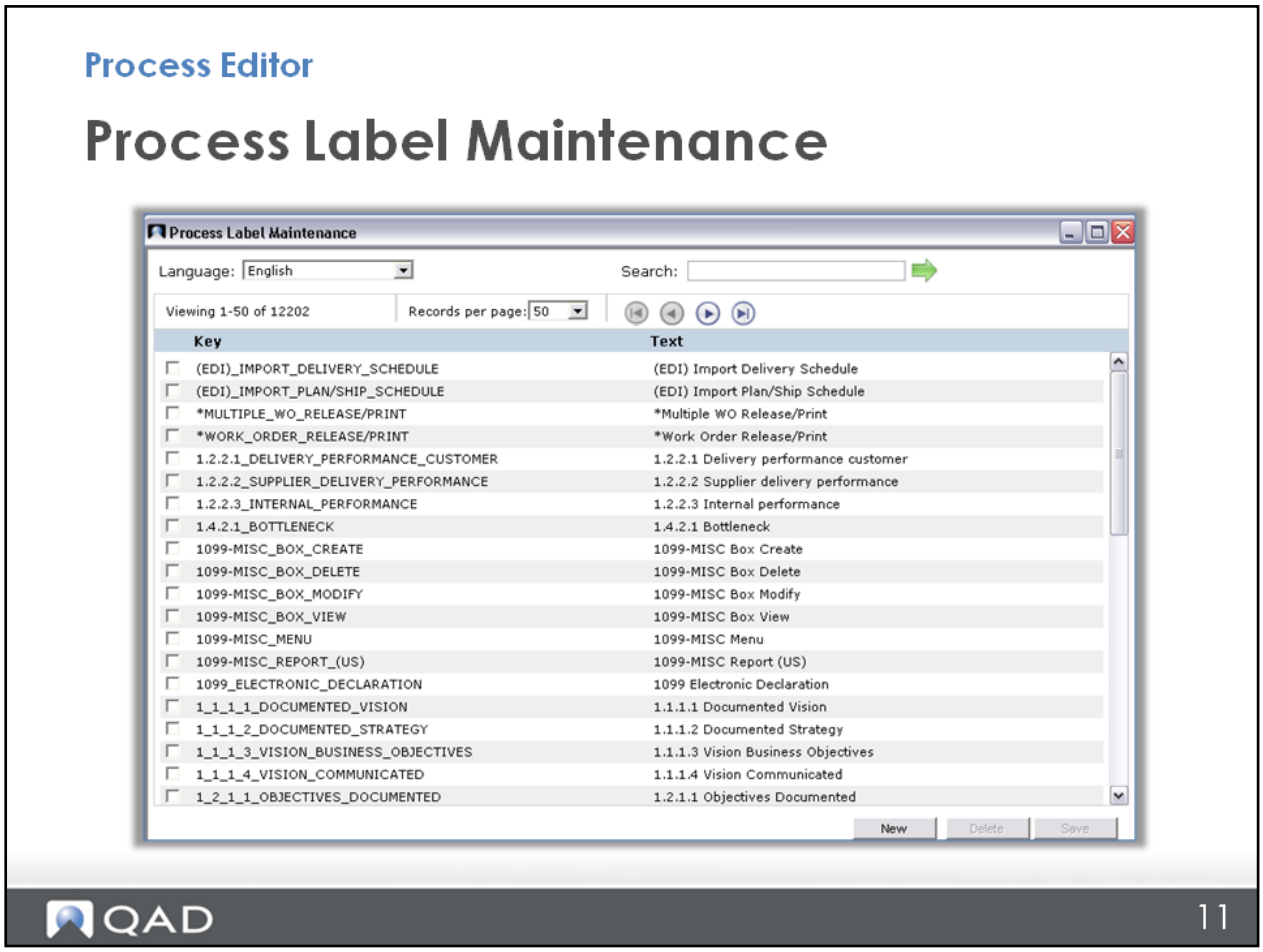
Node Name (Labels)



But what if you really want to use the word “Unpack”? It does not exist as a standard term, so you could just type it in as the label and make the node name. But there’s a better way than just letting everyone go around naming the nodes anyway they want. If you did it that way, you would have an unorganized, endless list of label names. What if you needed to change the name, or translate it? You would have to go into each node to make the individual updates.

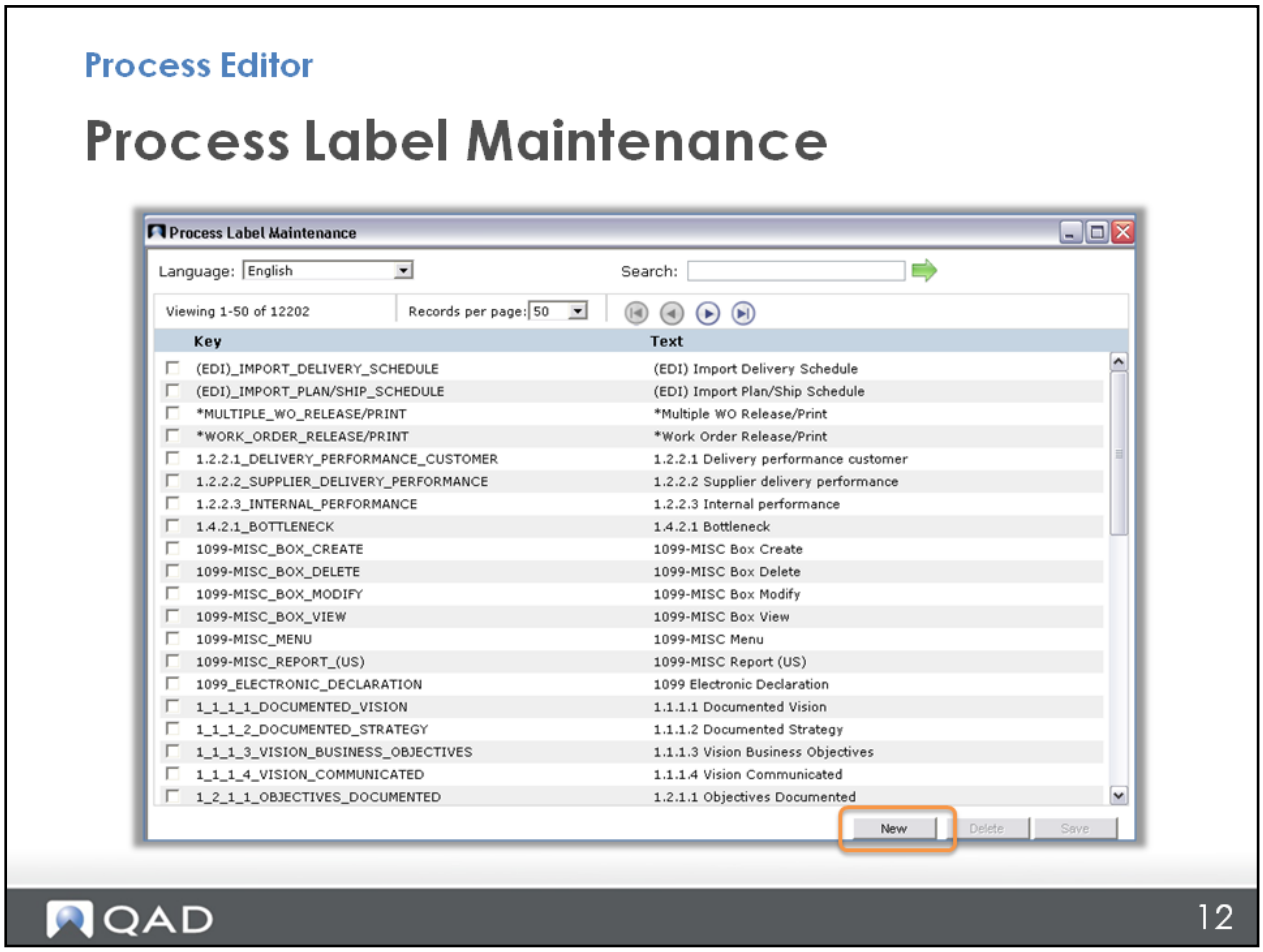
So to create a new label name, use Process Label Maintenance and make it with a “key.”

Process Label Maintenance



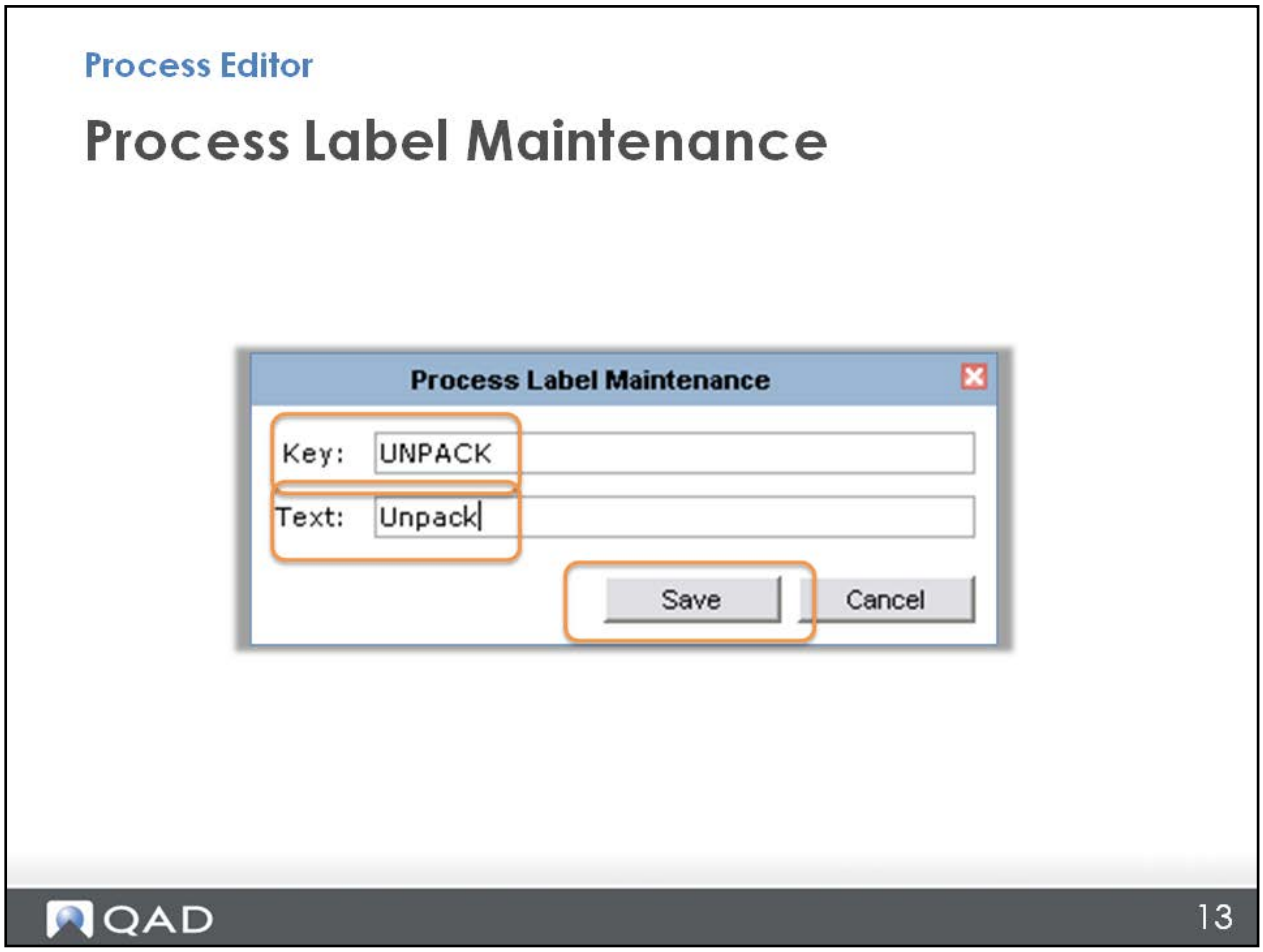
A key is the label name that can be referenced and updated or translated from that one label across all the places it appears in the process maps.

Process Label Maintenance



To create a key for your label name in Process Label Maintenance, click New at the bottom of the screen.

Process Label Maintenance



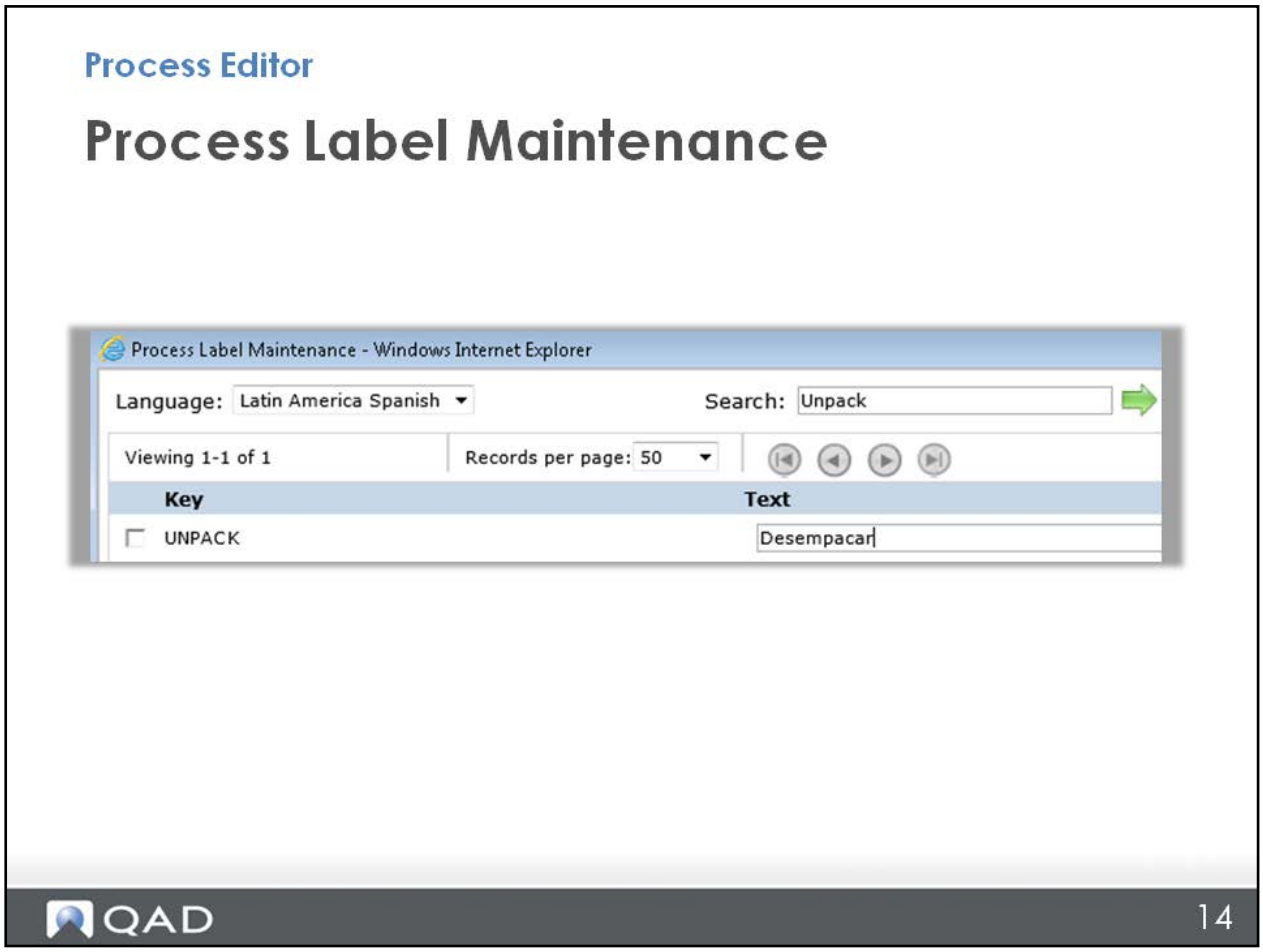
Enter the name you want to use as your key. The standard is to use all uppercase letters; for example, UNPACK. If you have more than one word, do not use spaces; use an underscore character (_) between the words. So, if you wanted to say “Unpack Boxes,” your key would be UNPACK_BOXES.

Also, avoid using any special characters; use only letters and the underscore.

In the text field, write the name (or key) the way you want it to actually appear in the node. Here you can use uppercase and lowercase letters and spaces.

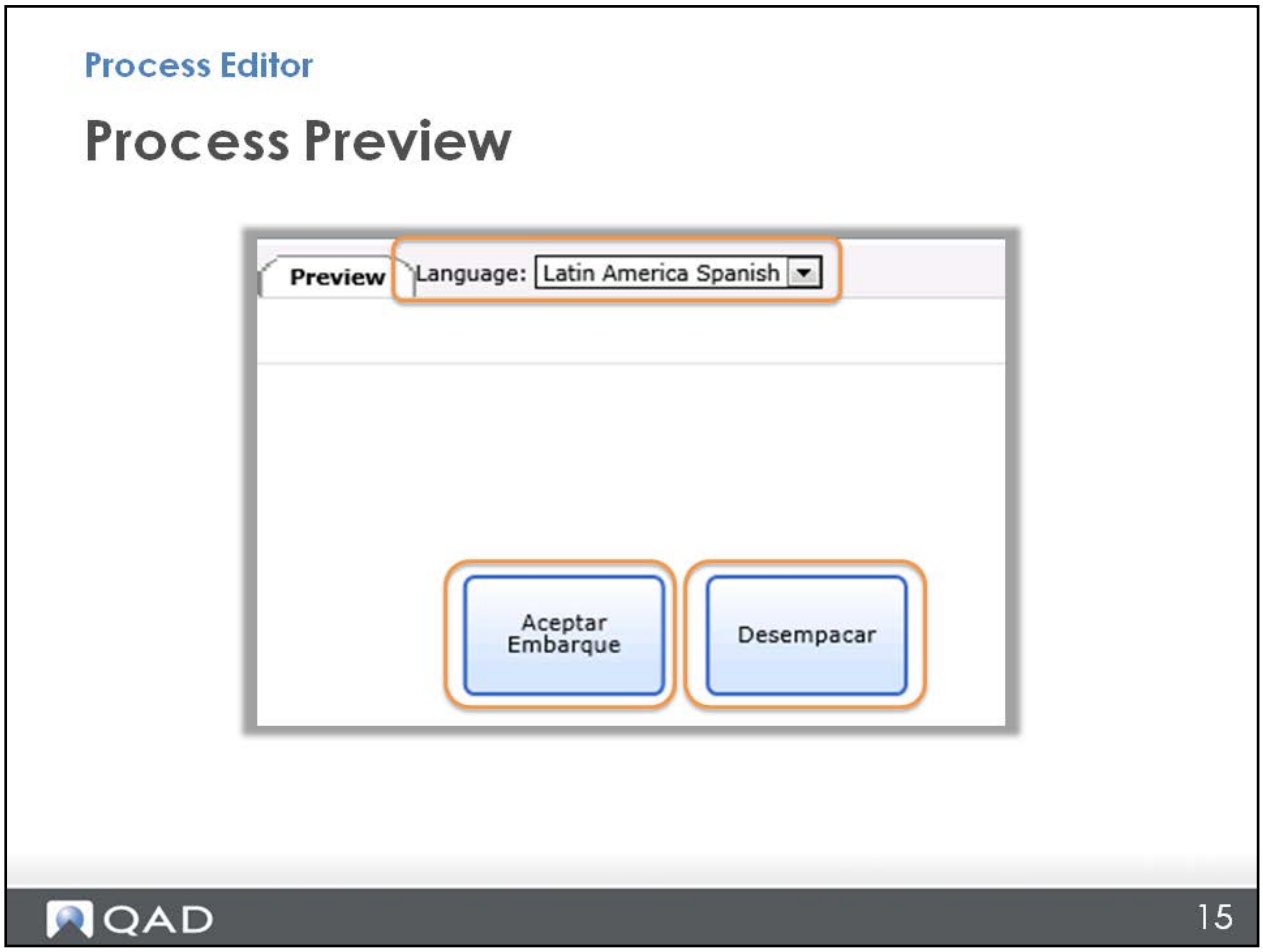
Click Save.

Process Label Maintenance



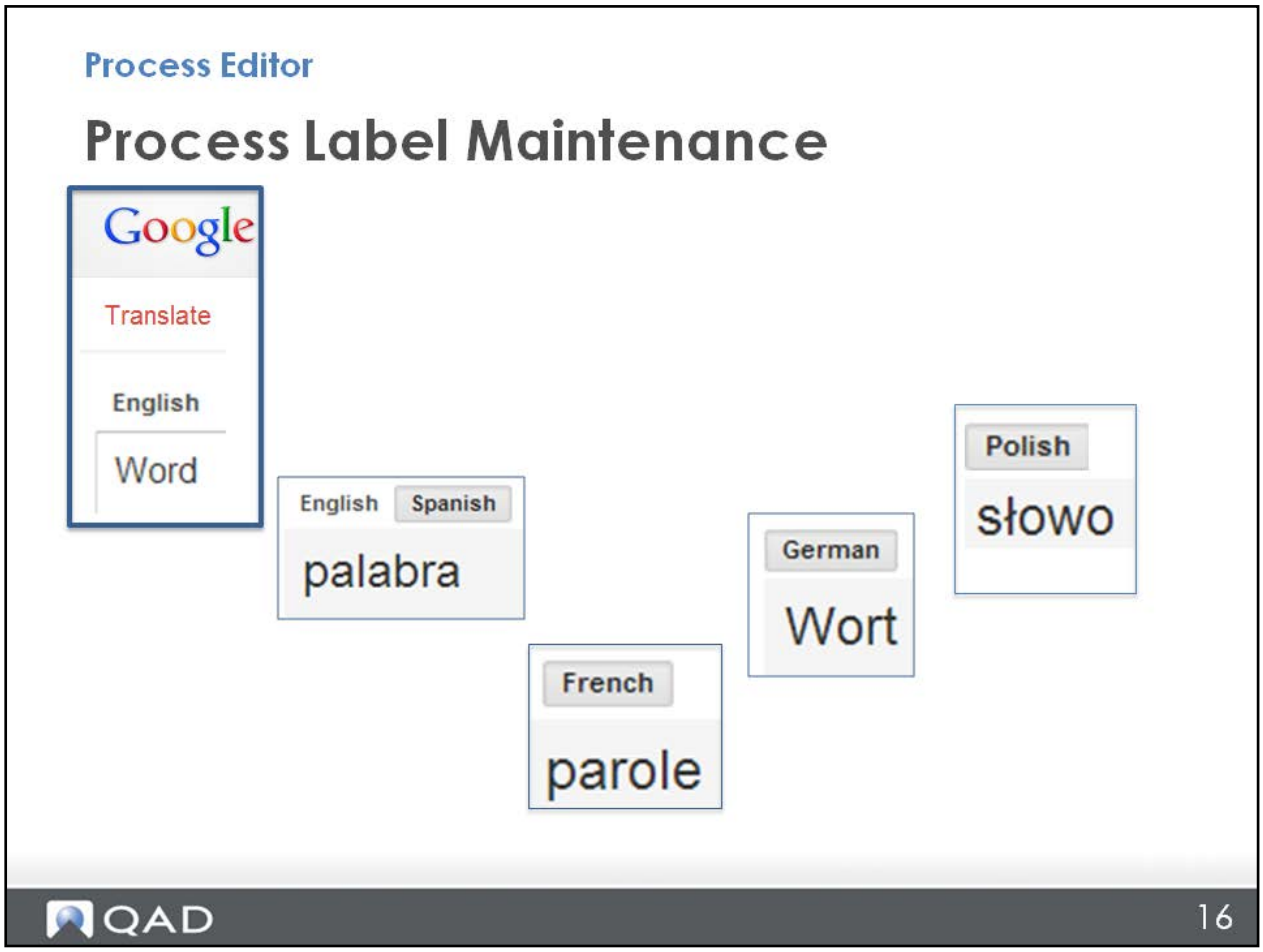
If you want to translate the label, use the same key in Process Label Maintenance, choose another language, and enter the translation. Even better, you can use translation software or a translation company to translate the list of labels.

Process Preview



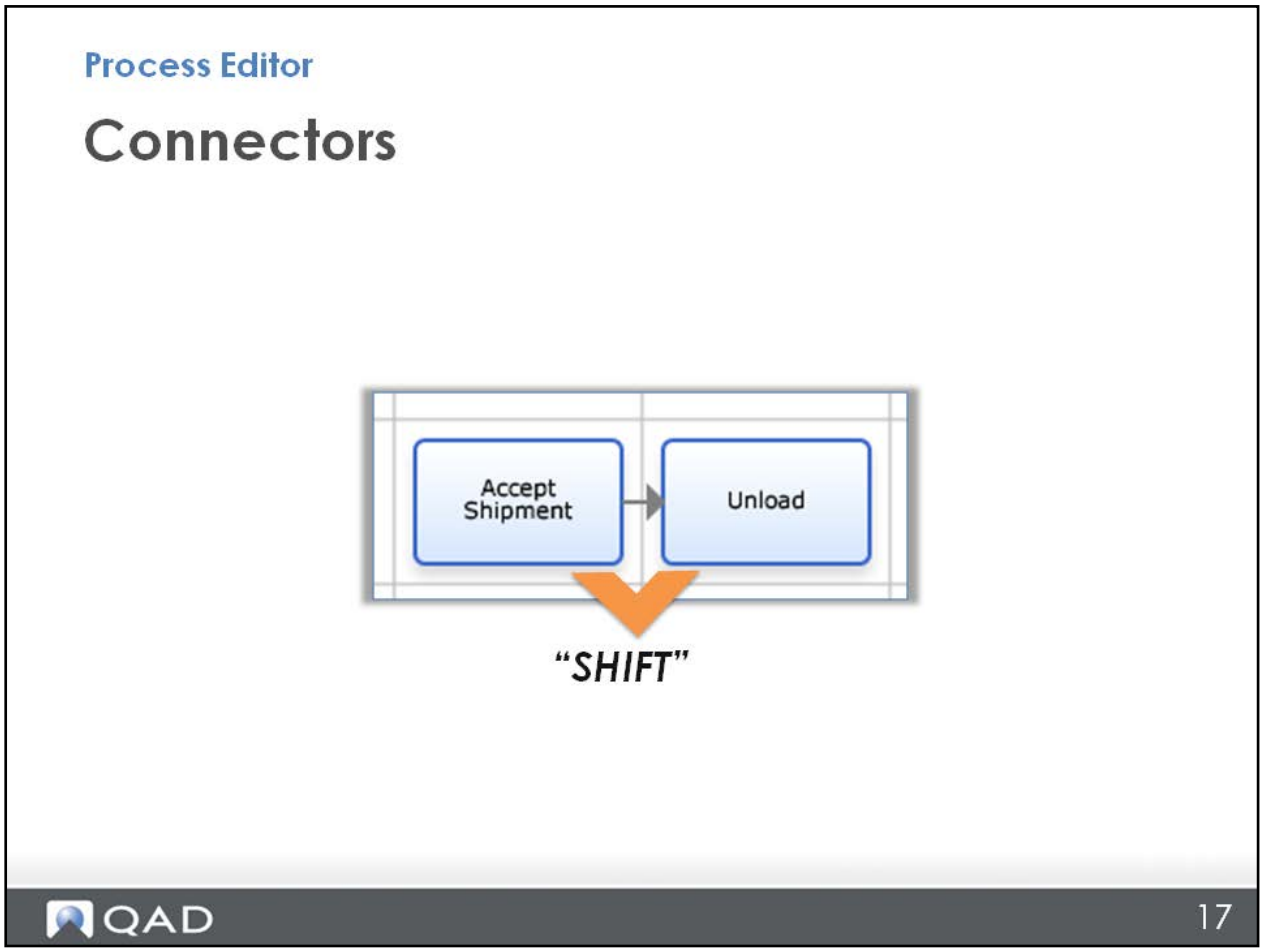
So now, when someone chooses to see the process maps in Spanish, they would see the node names translated.

Process Label Maintenance



It is like looking a word up in a translation dictionary. If you look up an English word, that is the key – it does not change. But then you look it up in Spanish or French, and the translated words change.

Connectors



Now connect the nodes.

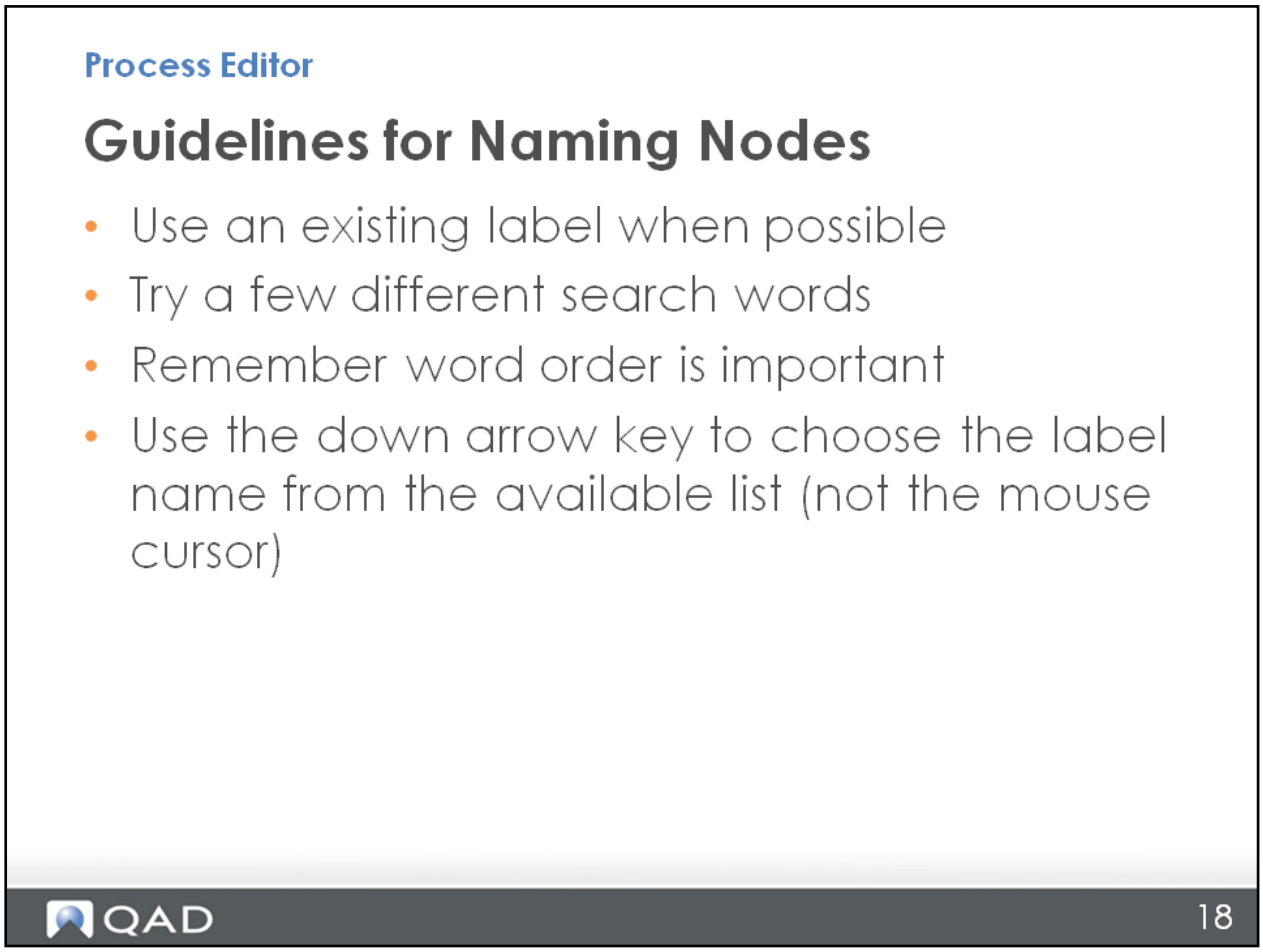
To add a connector:

- Click on the first node.
- Hold down the Shift key.
- Then, click on the second node.

This connects the nodes with a straight arrow.

Different kinds of connectors are covered later.

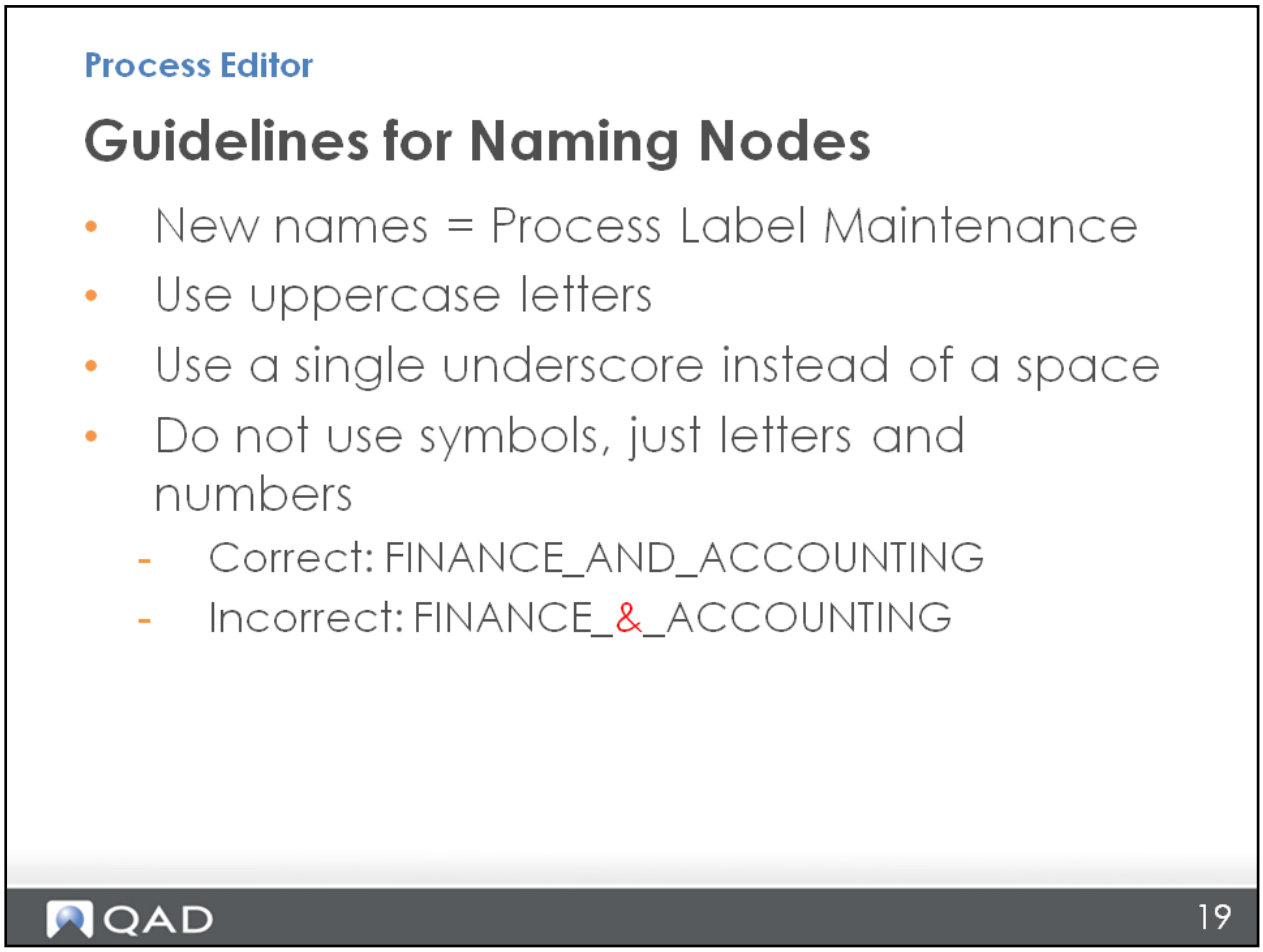
Guidelines for Naming Nodes



Before proceeding, review the guidelines for naming nodes.

- Use an existing label if you can; always check that first.
- Try different words.
- Remember that word order is important, so you may have to look it up a couple of different ways to find your label.
- Use the down arrow on the keyboard to open the menu and select the label.

Guidelines for Naming Nodes

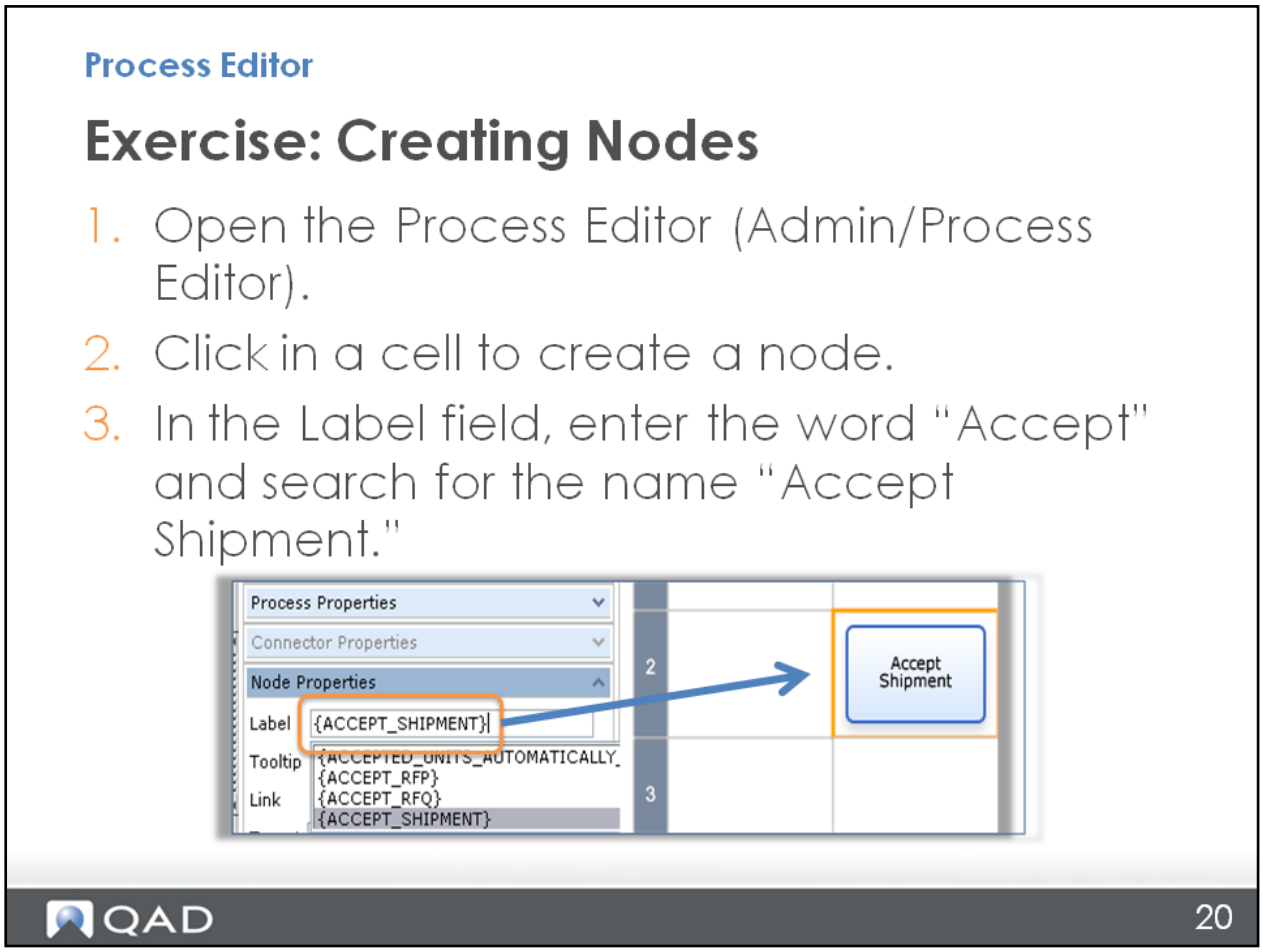


If you have to make a new label, do it in Process Label Maintenance.

- Always use uppercase letters and no spaces.
- Use an underscore character where you want a space.
- Do not use symbols.

The first example here is correct, but the second one is not.

Exercise: Creating Nodes



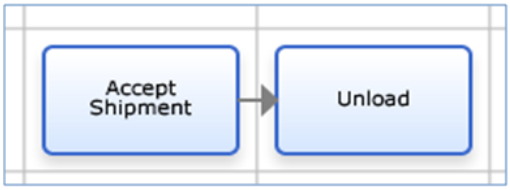
To test your knowledge so far, do this exercise about creating and connecting nodes. If you do not find the label “ACCEPT_SHIPMENT,” remember to create it in Process Label Maintenance and then choose it from the dropdown list in Node Properties. The exercise is continued on the next page.

Exercise: Connecting Nodes

Process Editor

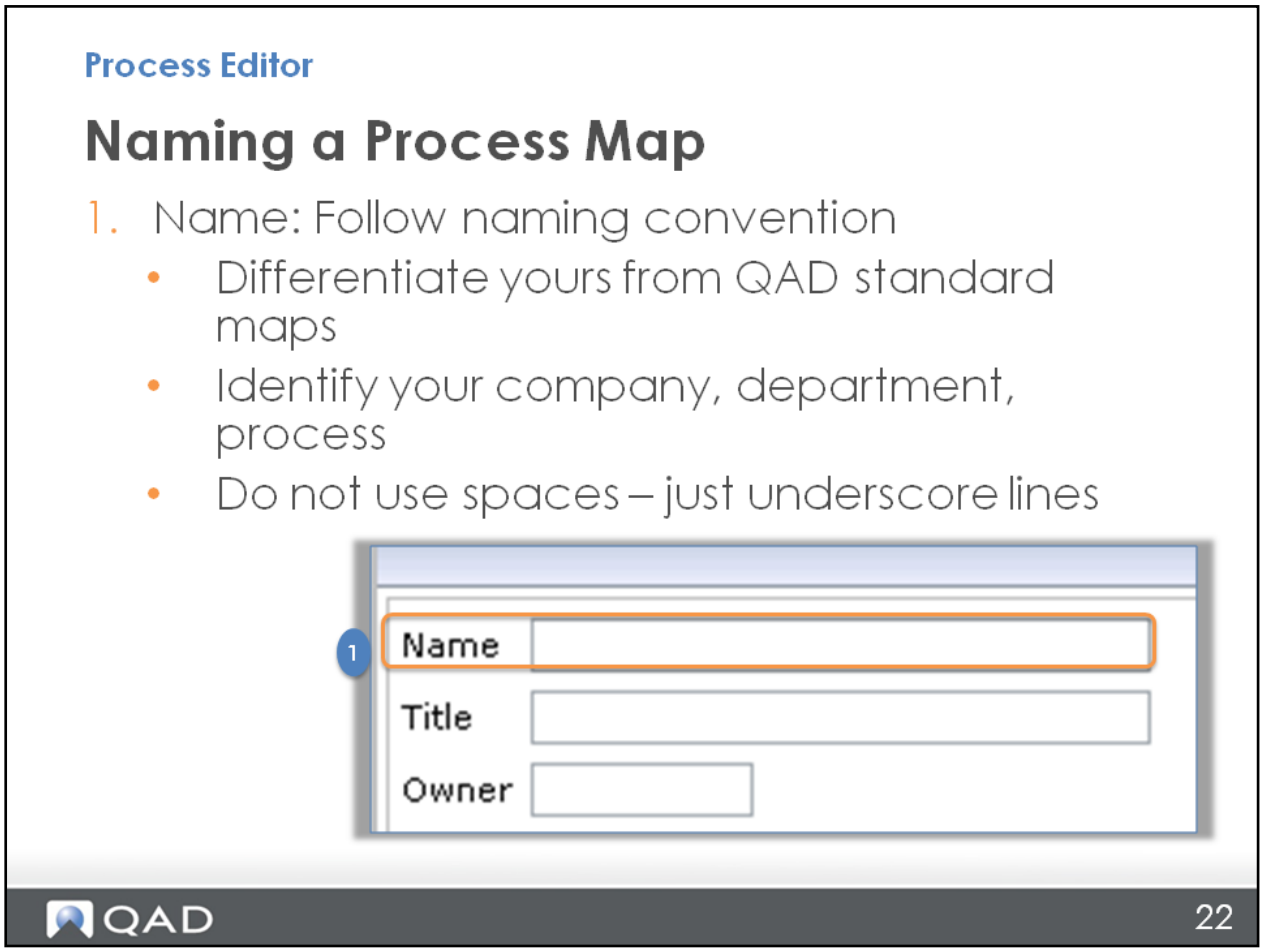
Exercise: Connecting Nodes

4. Once you have named the first node, create a second node and name it "Unload."
5. Connect the two nodes.



QAD 21

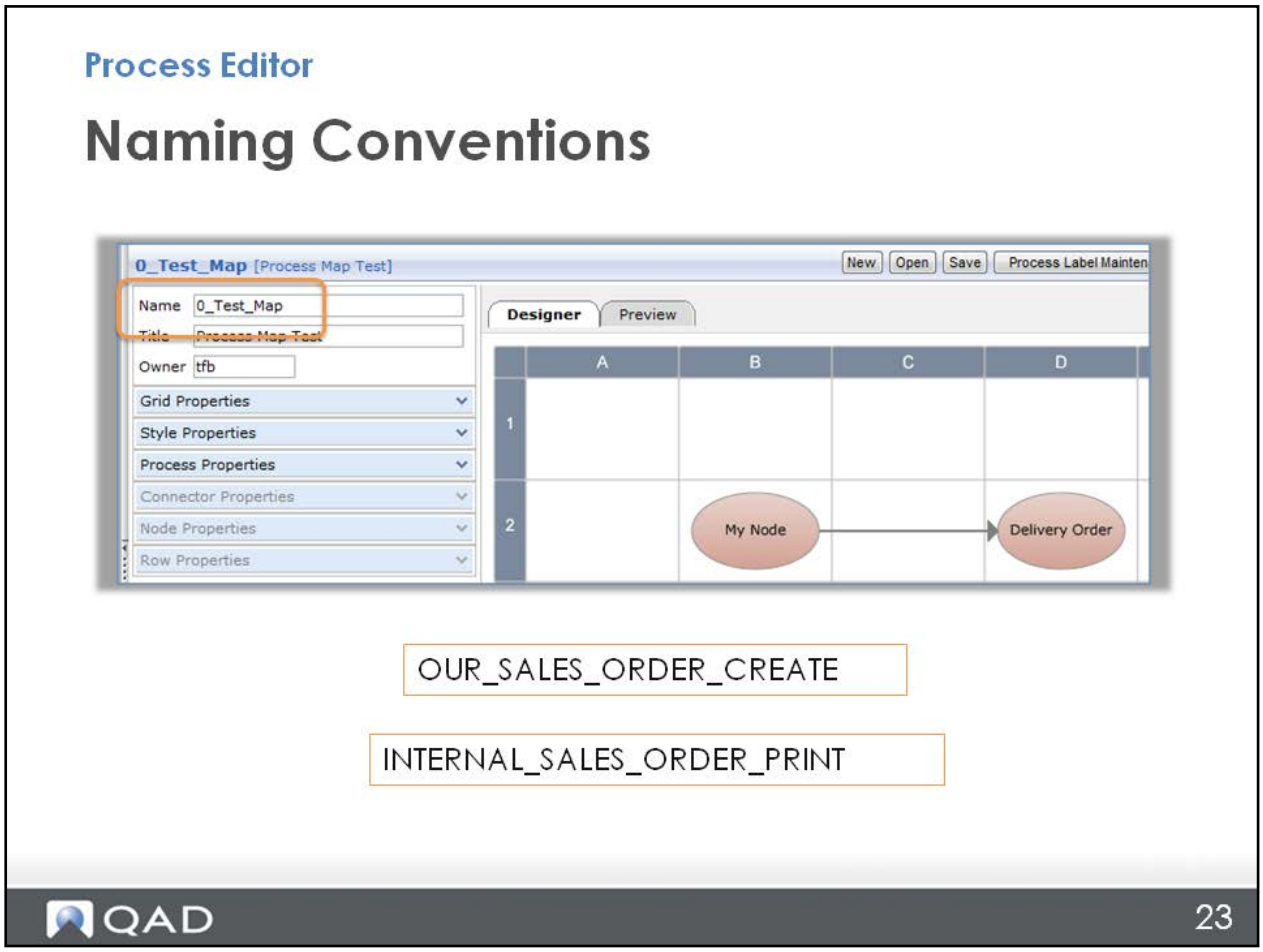
Naming a Process Map



Now, it is time to name the process map and save it.

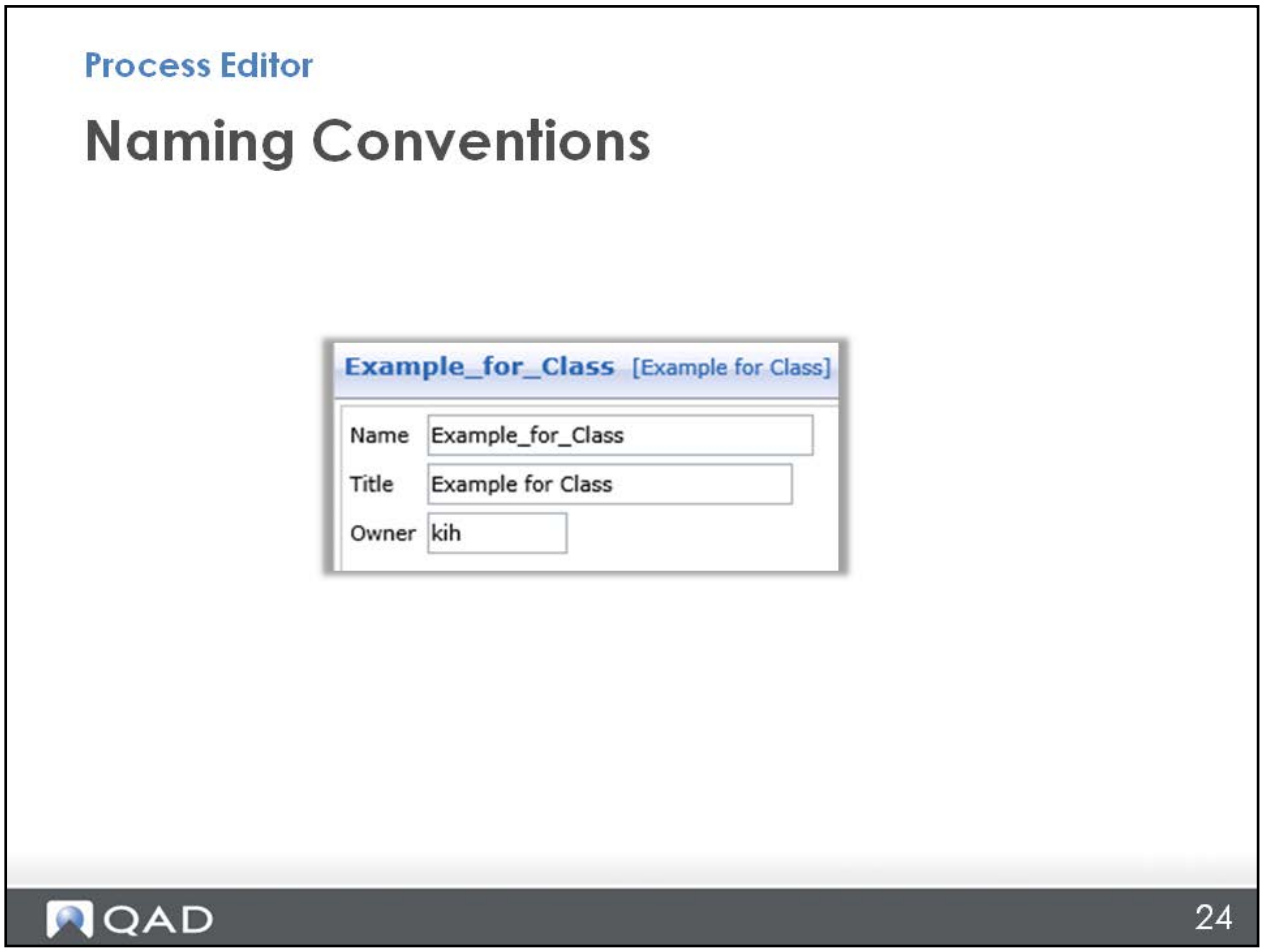
The name is important and to stay organized, it really should follow a naming convention – something your company establishes as the norm for naming process maps. The convention also should differentiate your own internal maps from the QAD maps. This could mean starting out with your company name or an abbreviation for it. It could also have initials or a number that represent a department, process, or project name and then a descriptive word. Use underscore lines instead of spaces.

Naming Conventions



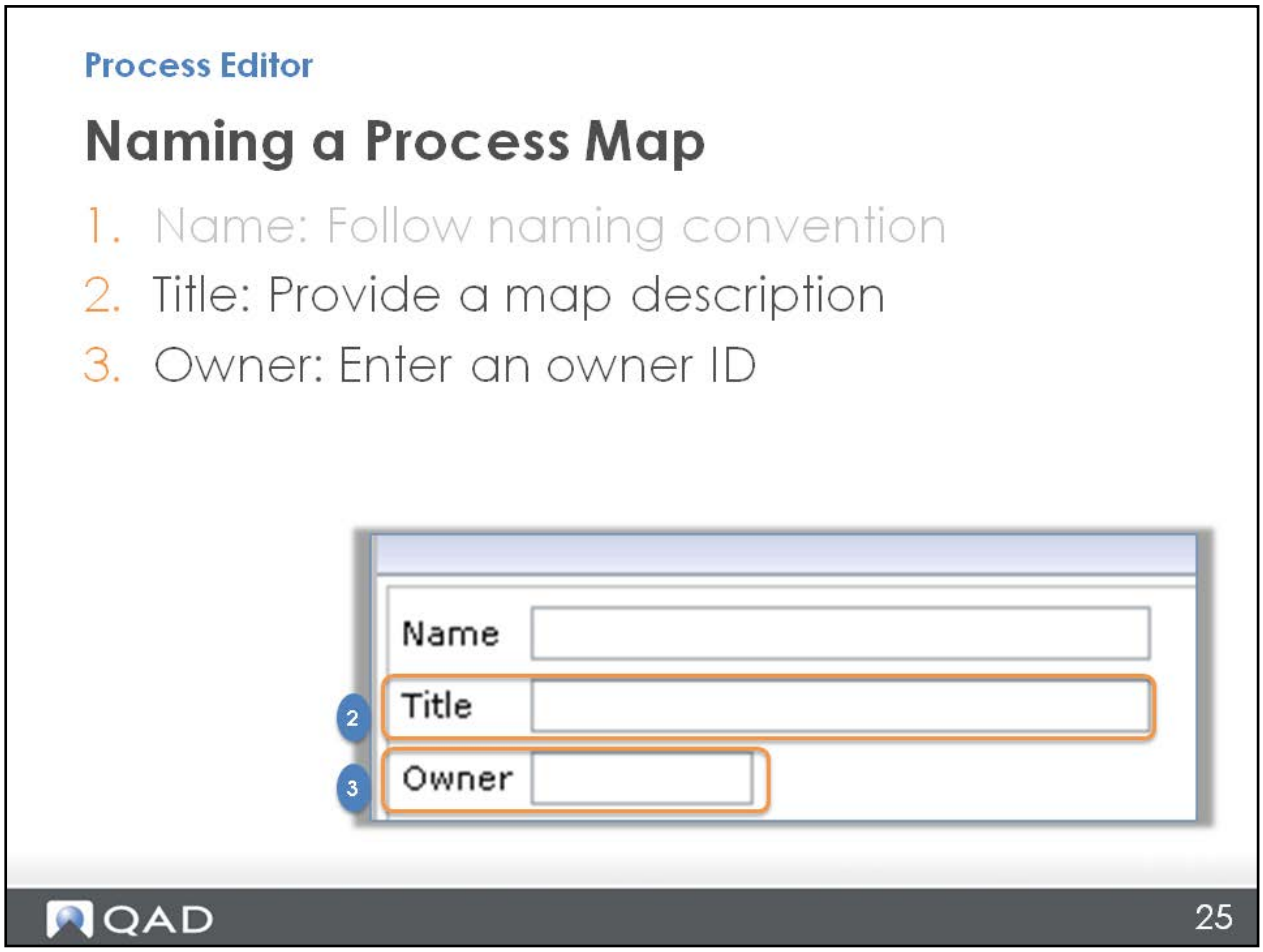
Here is an example of a name: 0_Test_Map. You might have OUR_SALES_ORDER_CREATE or INTERNAL_SALES_ORDER_PRINT. Or if you are General Motors, you might start with “GM_.”

Naming Conventions



For the map just created, use the name “Example for Class.”

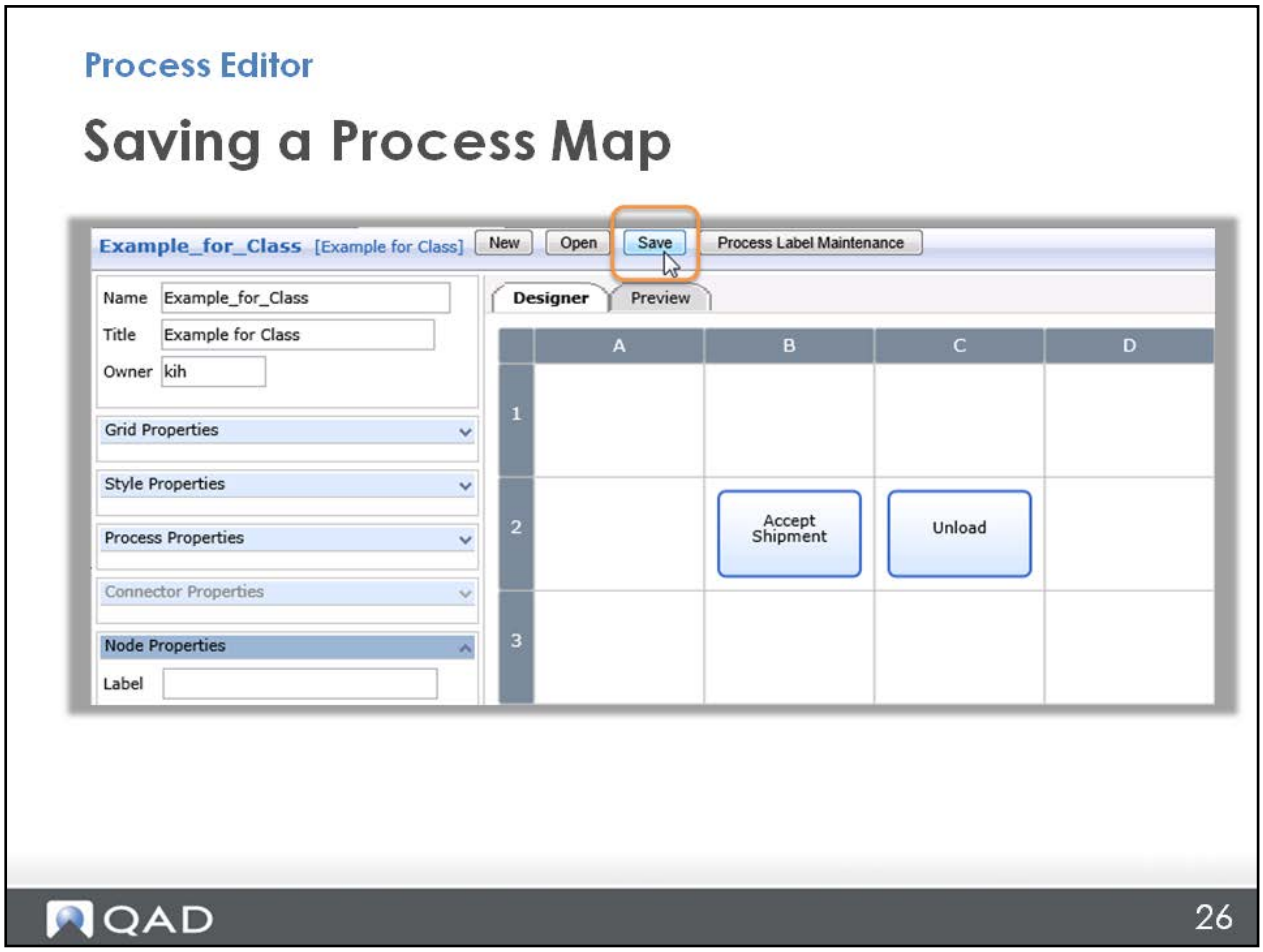
Naming a Process Map



The title can be anything describing what the map is about, something to identify the map, and you can write it in the normal way.

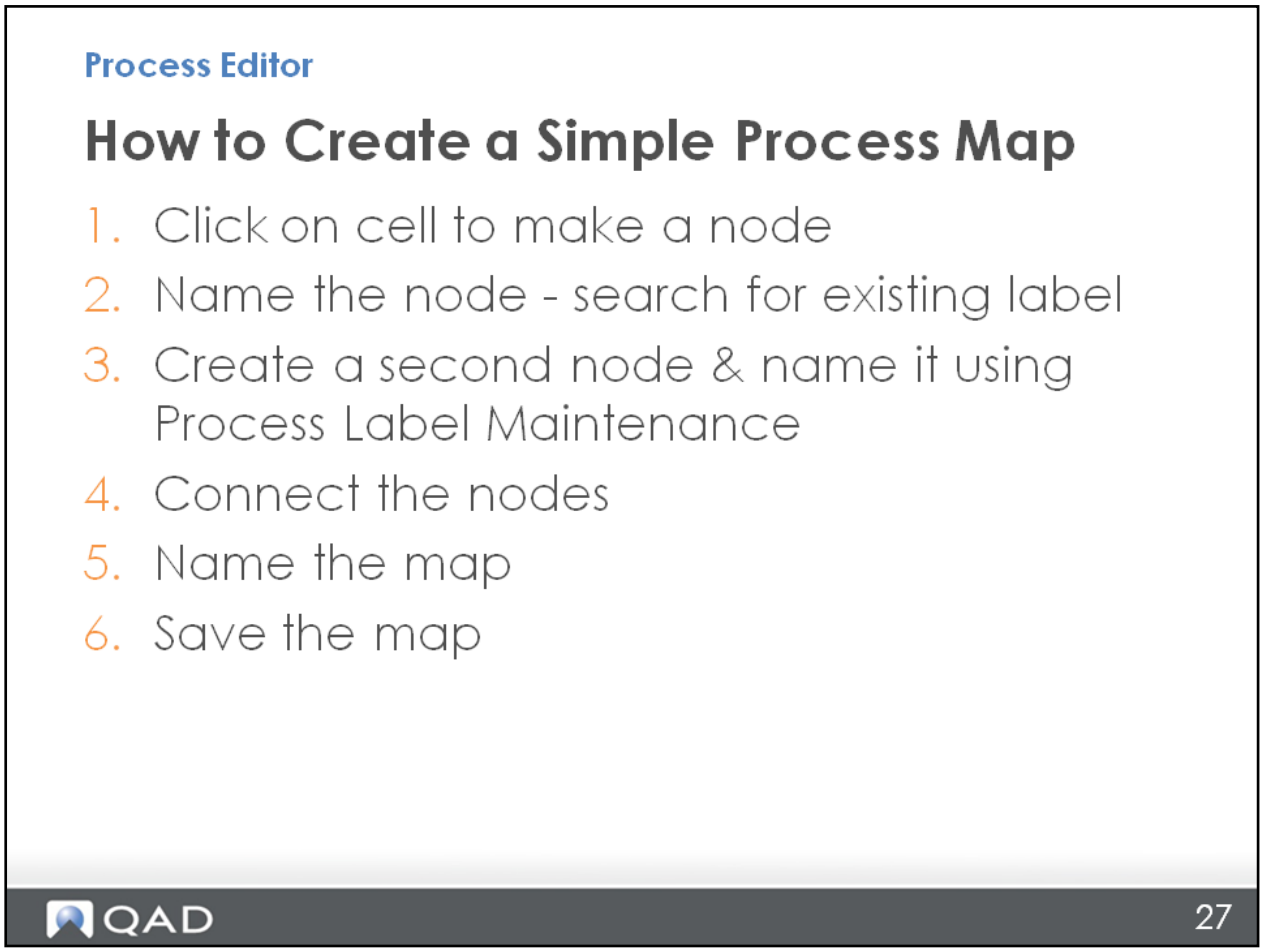
For the owner, put your name or company ID; for example, QAD uses a three-letter user ID, so that would be the owner.

Saving a Process Map



Now it is time to save your map. Do this by clicking Save in the upper left of the Process Editor screen.

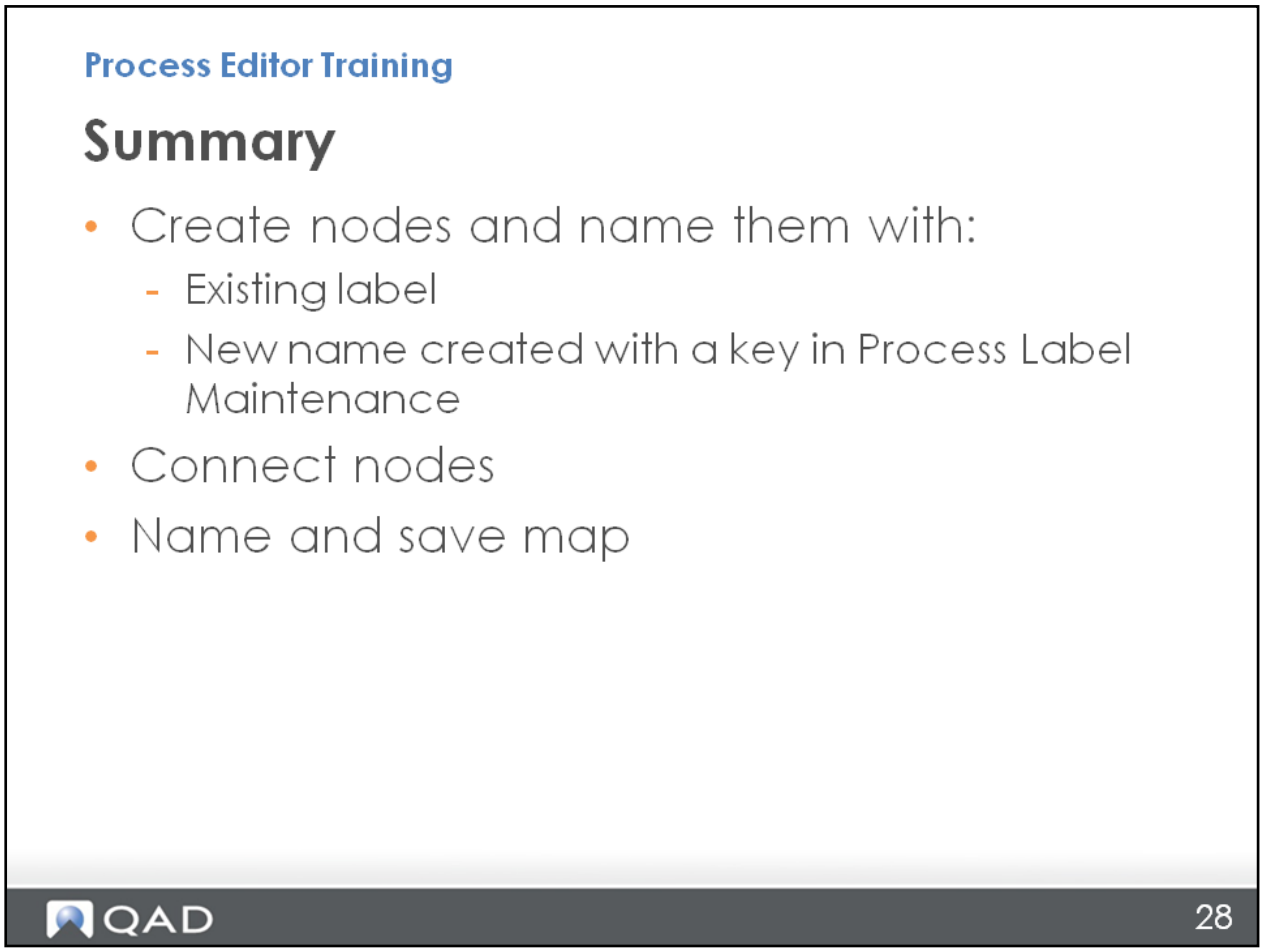
How to Create a Simple Process Map



In review, here are the steps used in this module to create a simple process map.

- First, click a cell to make the standard, default node, which is a blue rectangle.
- When you click the cell, the Node Properties box opens on the left. There, name the map by searching for an existing label.
- For the second node, create a new label with a key in Process Label Maintenance.
- Connect the nodes.
- Follow a naming convention to name the map, and save it.

Summary



So far, you have learned how to:

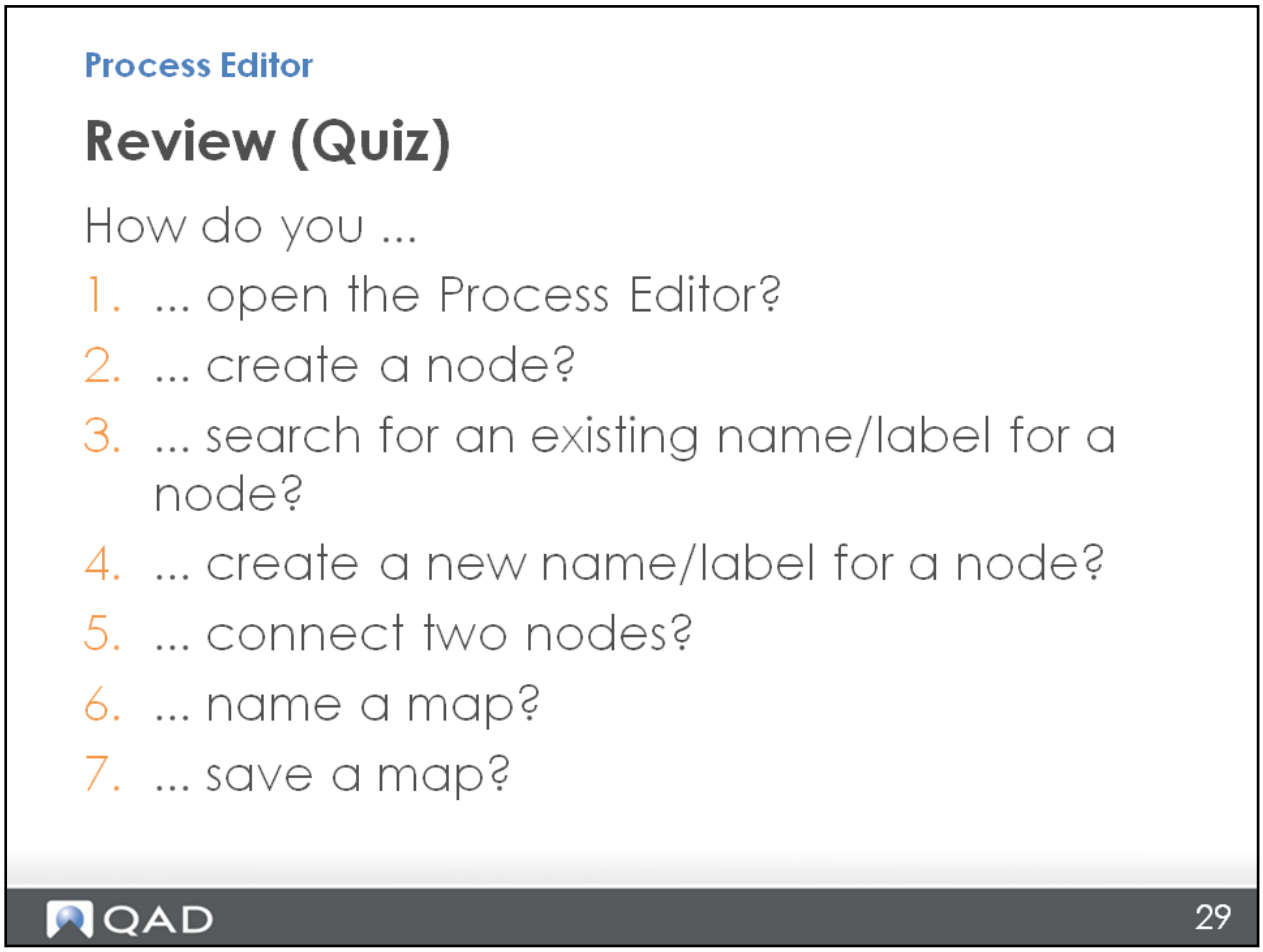
Create nodes and name them using labels that already exist or by creating new ones in Process Label Maintenance.

Use keys that help keep you organized, especially if you are going to translate the names to show the process maps in other languages.

Connect the nodes.

Name the process maps following a convention, then save them.

Review (Quiz)



Before concluding this section, answer these questions.

Your answers:

1.

2.

3.

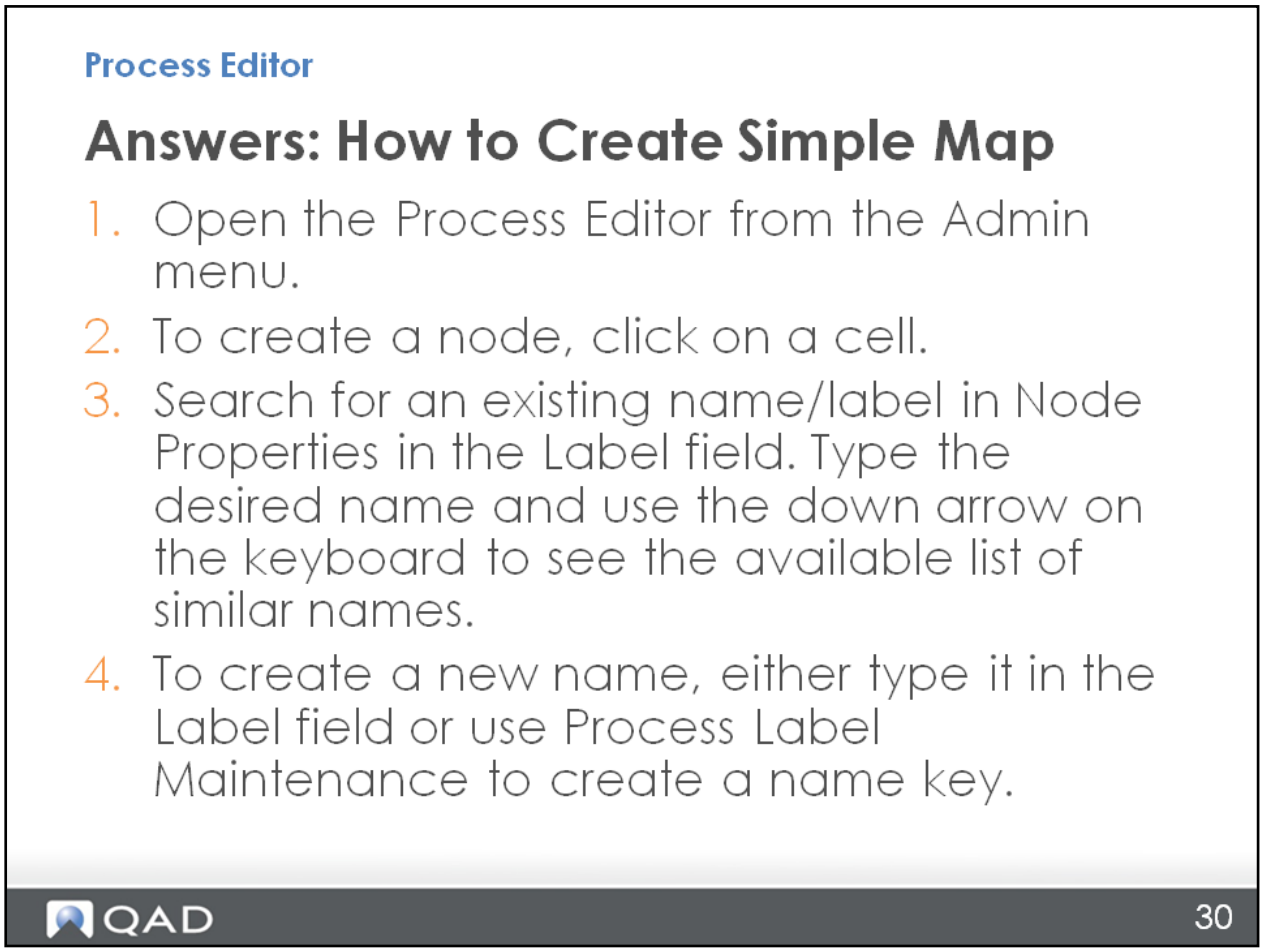
4.

5.

6.

7.

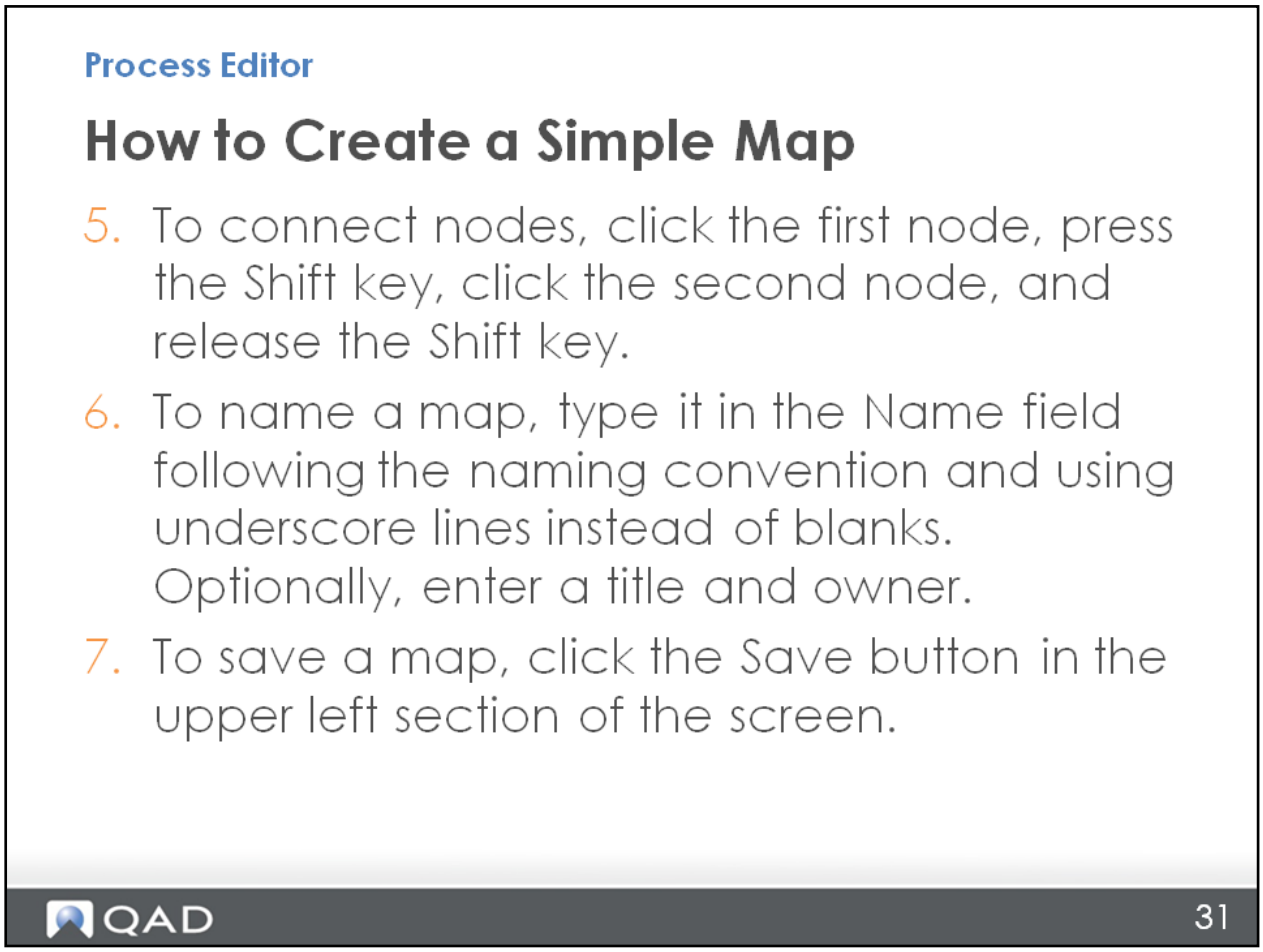
Answers: How to Create Simple Map



Here are the answers (continued on the next page).

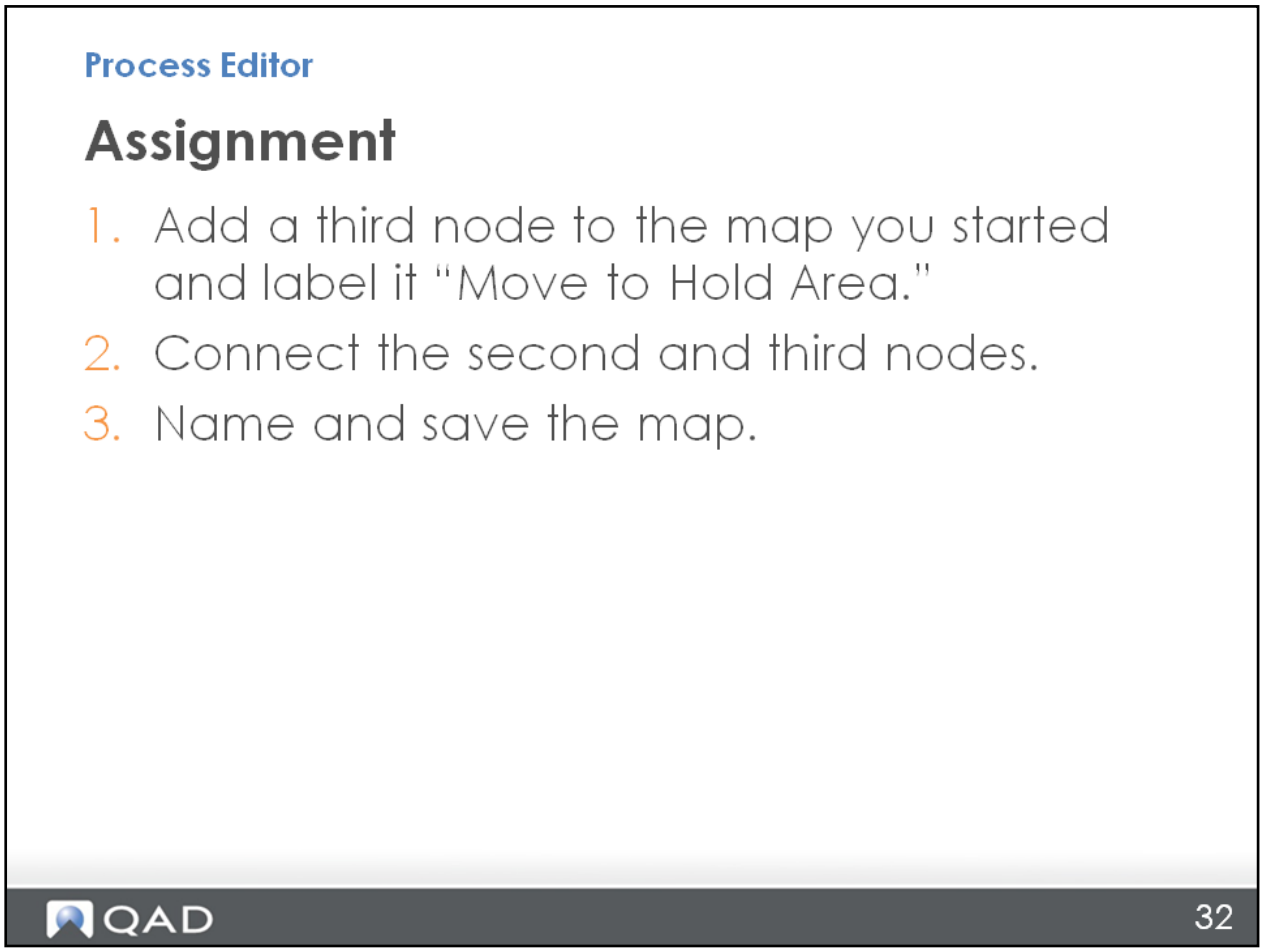
Note that you can also open the Process Editor by clicking on the Editor icon in an existing map, or searching for it in the menu search field.

How to Create a Simple Map



And the rest of the answers.

Assignment



Here is your next assignment:

1. Add a third node to the map you started earlier and name it “Move to Hold Area.”
2. Connect the second and third nodes.
3. Name and save the map.

CHAPTER 3

Nodes

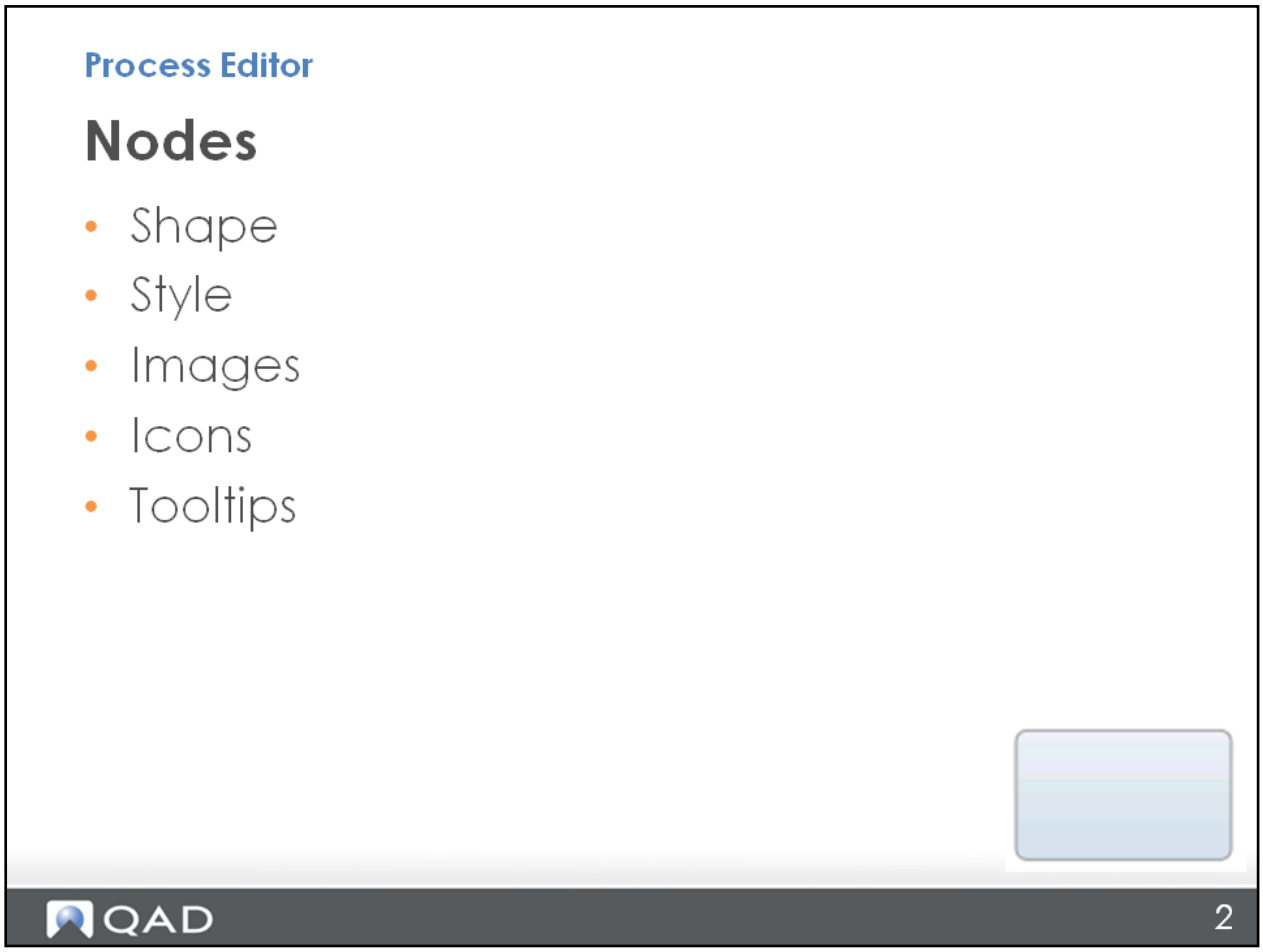
This section presents the different options available for designing nodes.

To watch a video of this section, go to the Learning Center (http://learning.qad.com) and use the Smart Search tab to search the key words “Process Editor.” Take the third section (3 of 9) called “Nodes,” Course #OLT-006850.

Or, if you are already logged into the Learning Center, just click here:

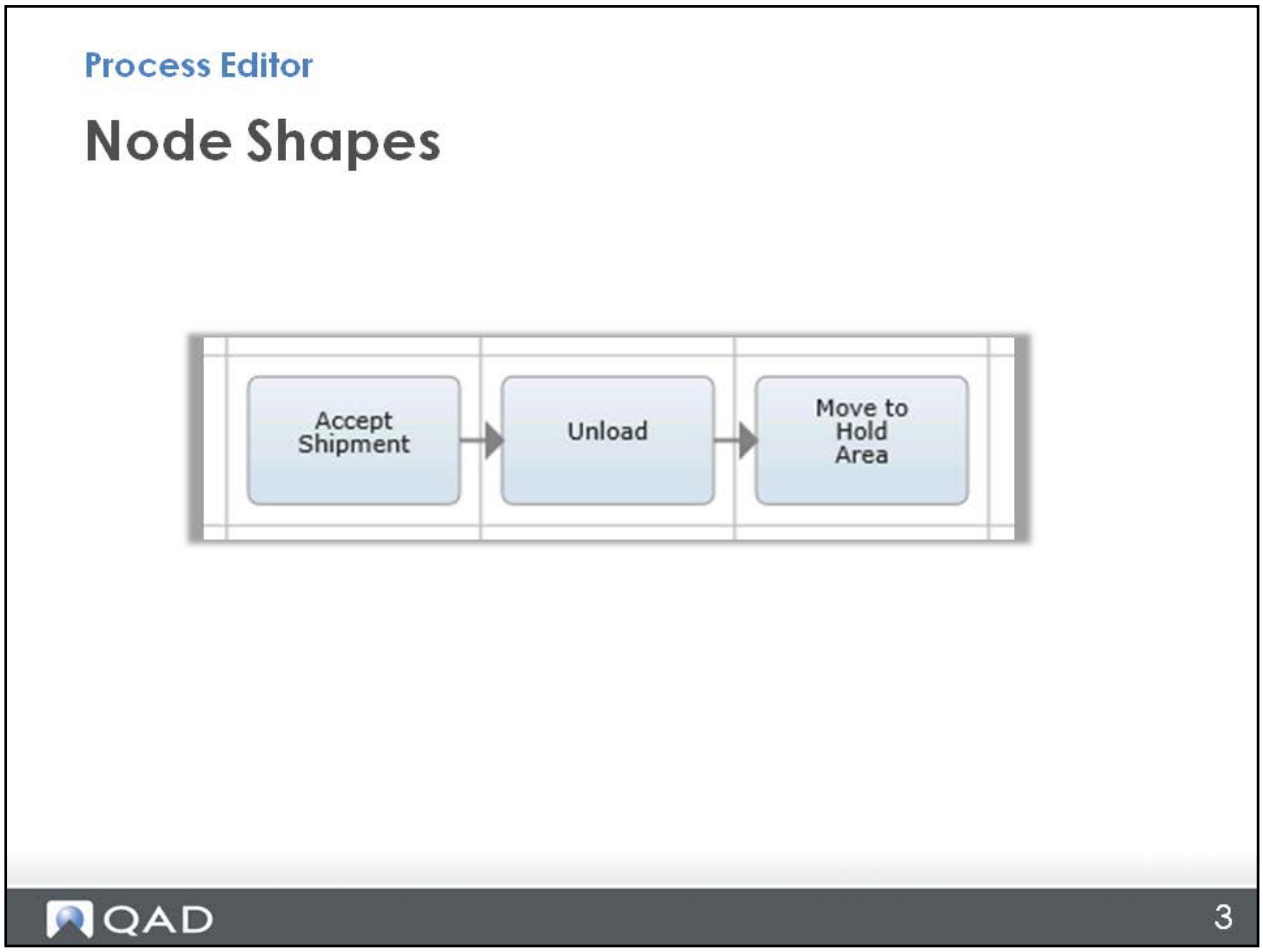
https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?id=22506432649

Nodes



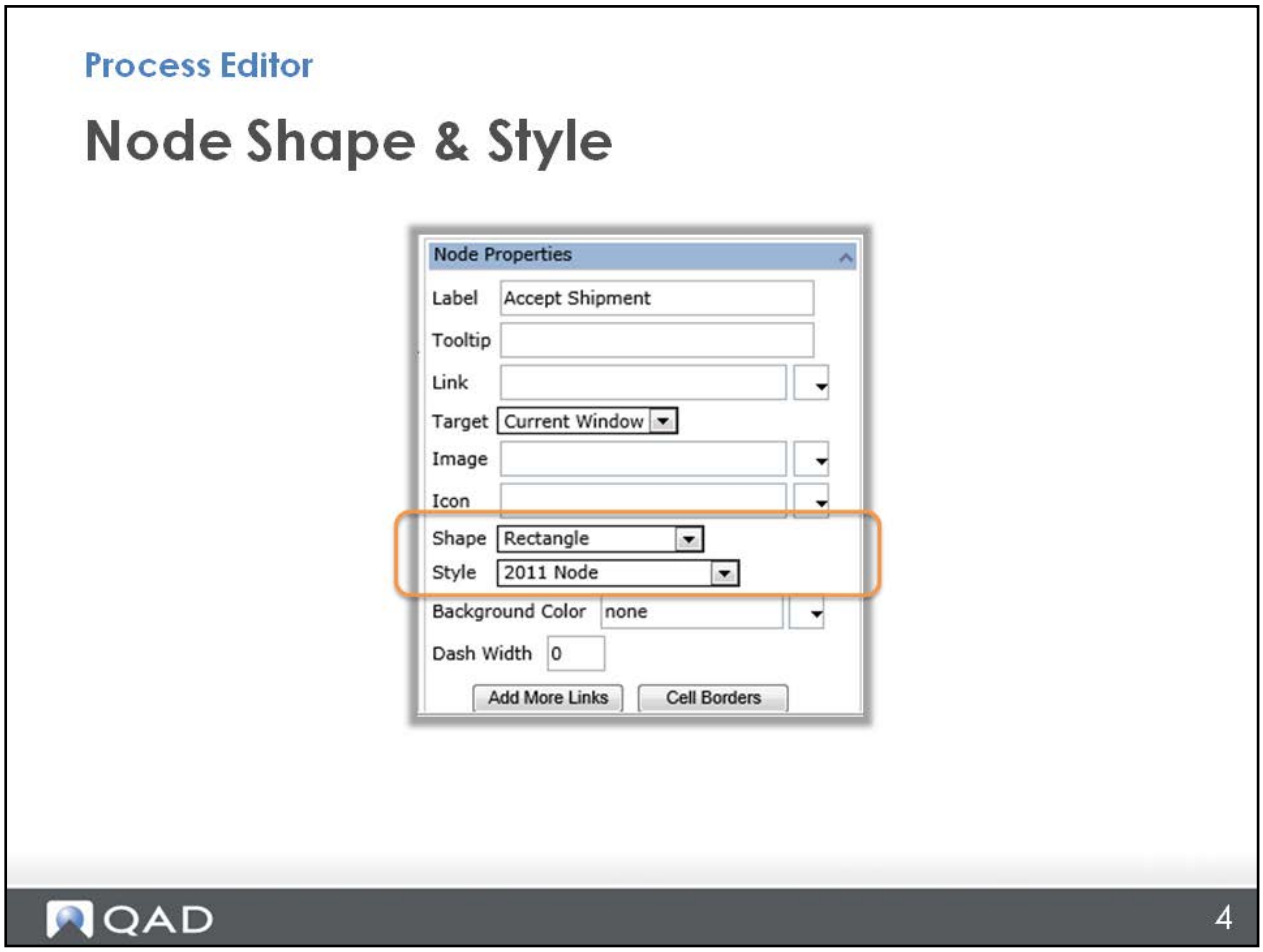
You can change their shape and style; you can change them into images, add icons to them (like a logo, for example), and tooltips, which are words that can appear when you hover your mouse over them. You can also add links to nodes, but these are discussed in a separate section of this training.

Node Shapes



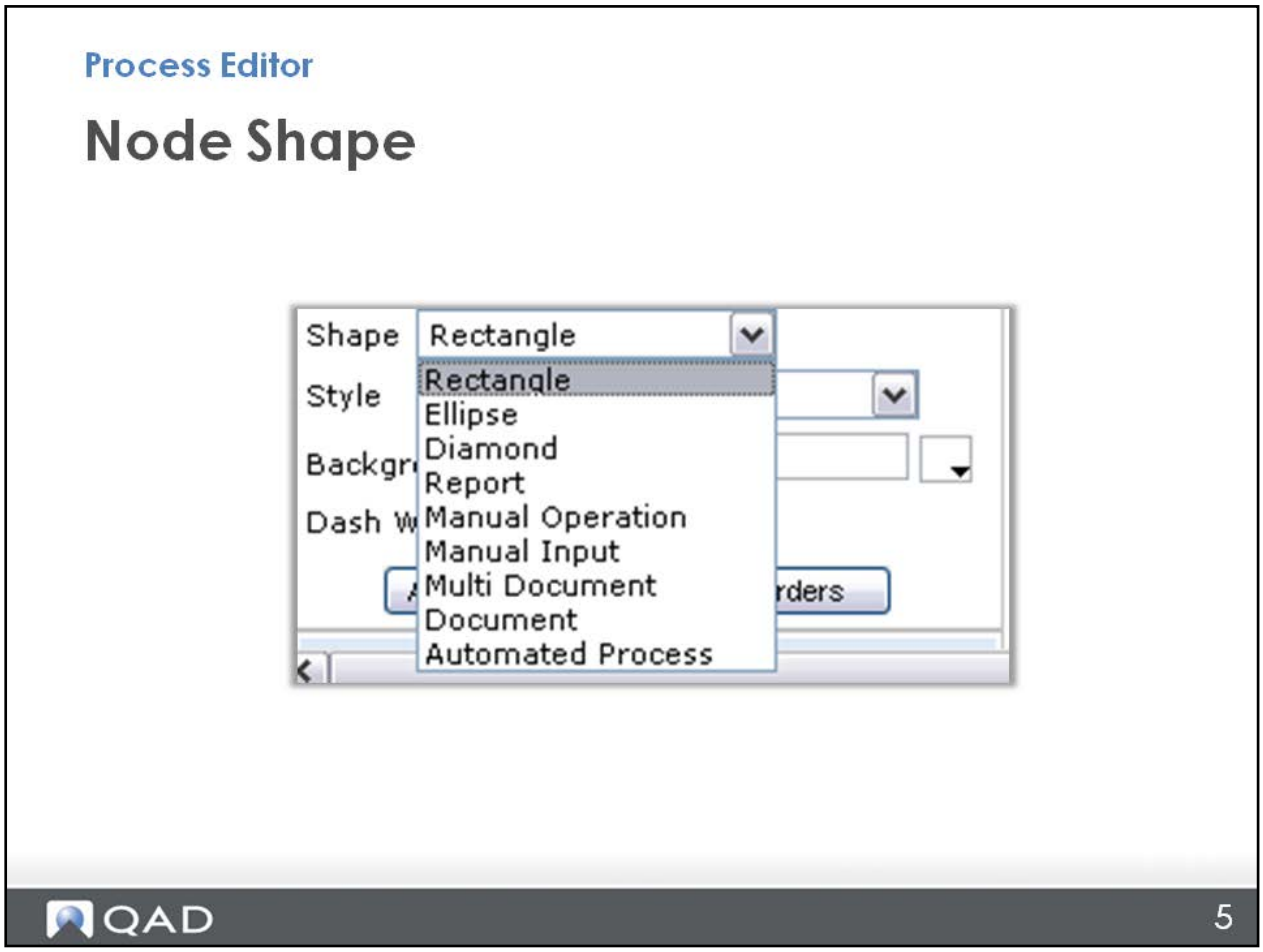
Until now, this training has been limited to creating nodes in their default style, which is a blue rectangle. Now you will see how to change the shapes and colors of the nodes to reflect what the node actually represents.

Node Shape & Style



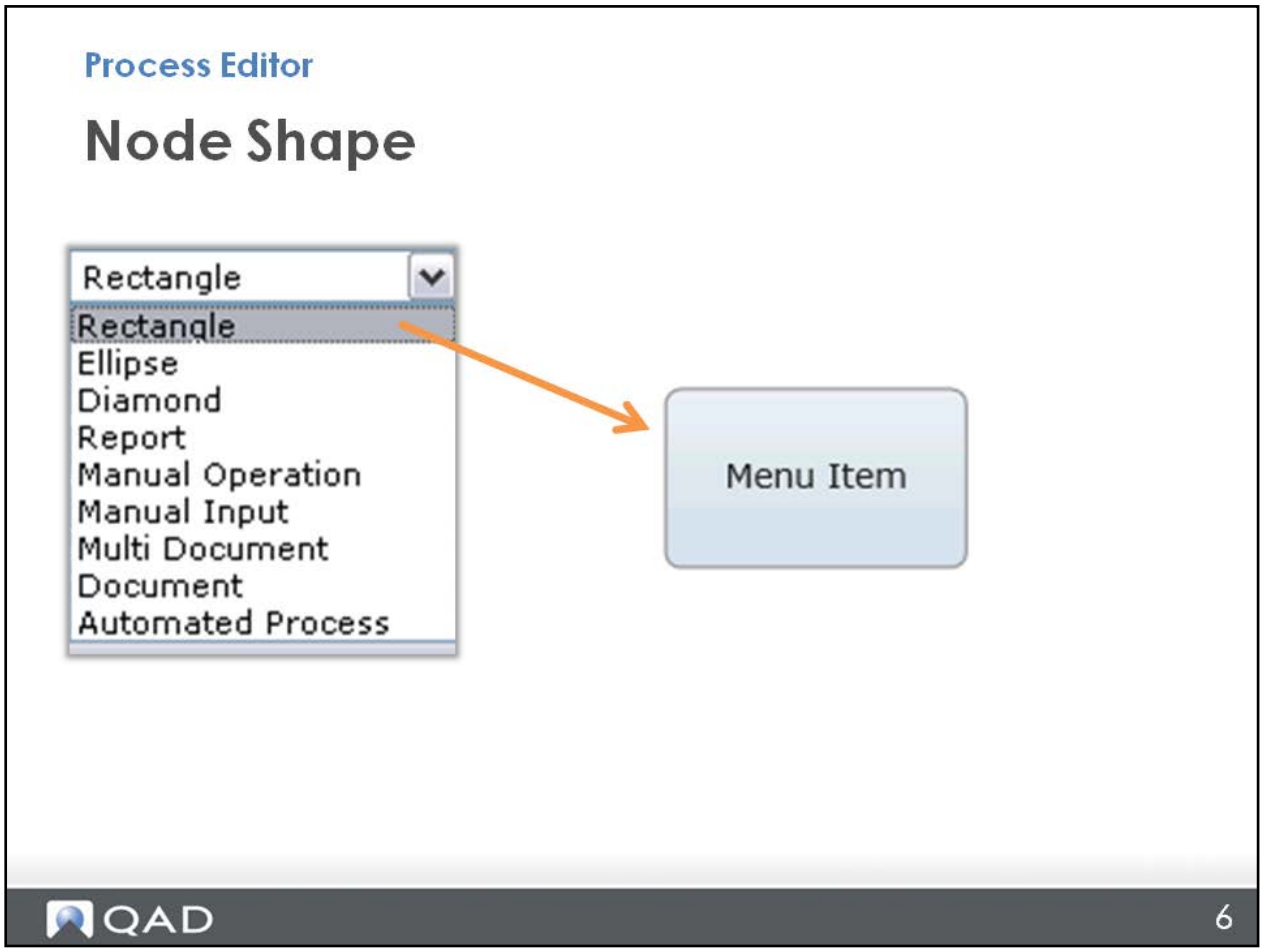
As you know, when you click on a cell and create a node, the Node Properties menu opens on the left. Look down where it says Shape and Style.

Node Shape



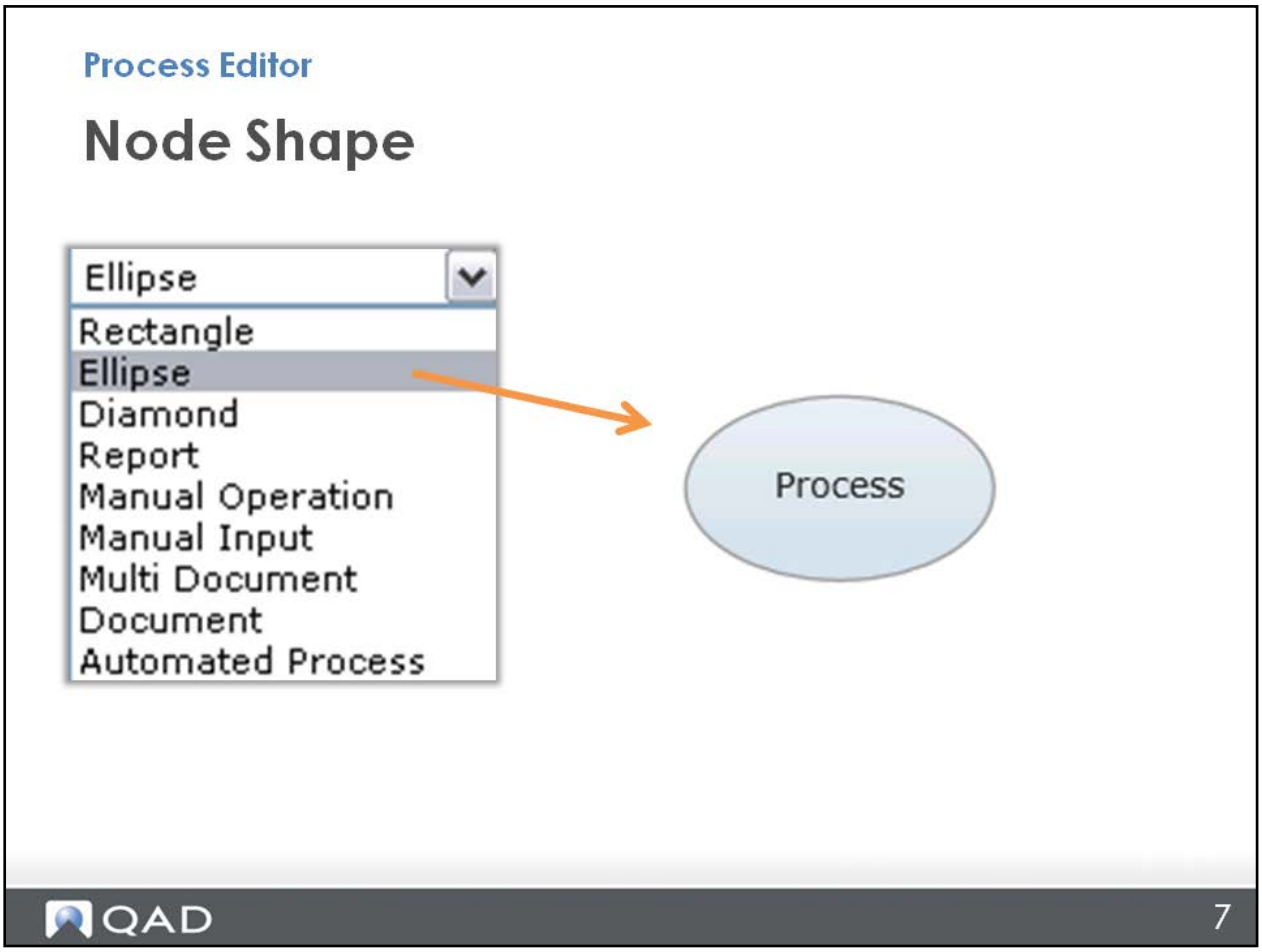
These are the available shapes, including rectangles, diamonds, and shapes that represent documents and processes.

Node Shape



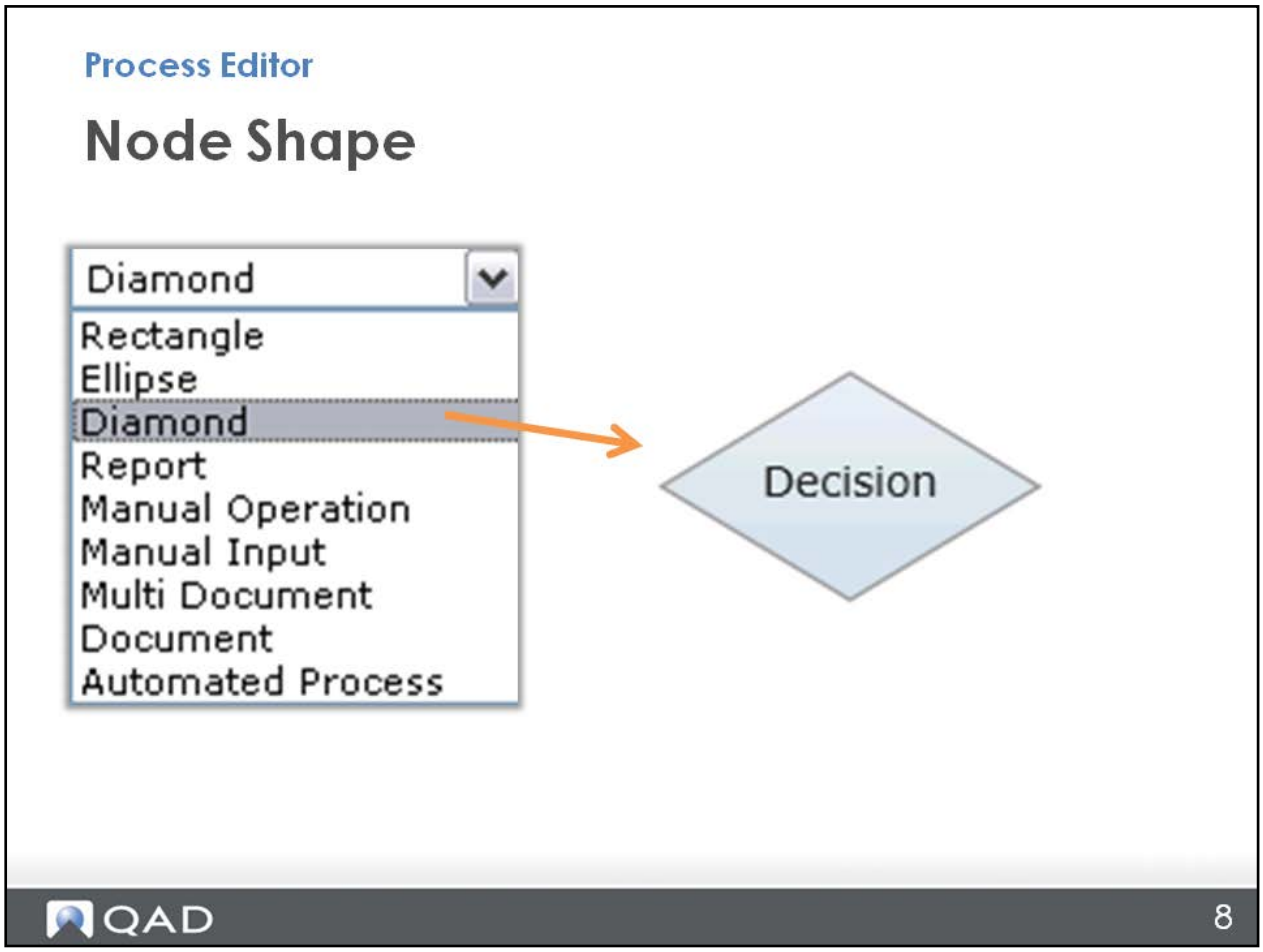
A rectangle represents a menu item and links to a QAD program.

Node Shape



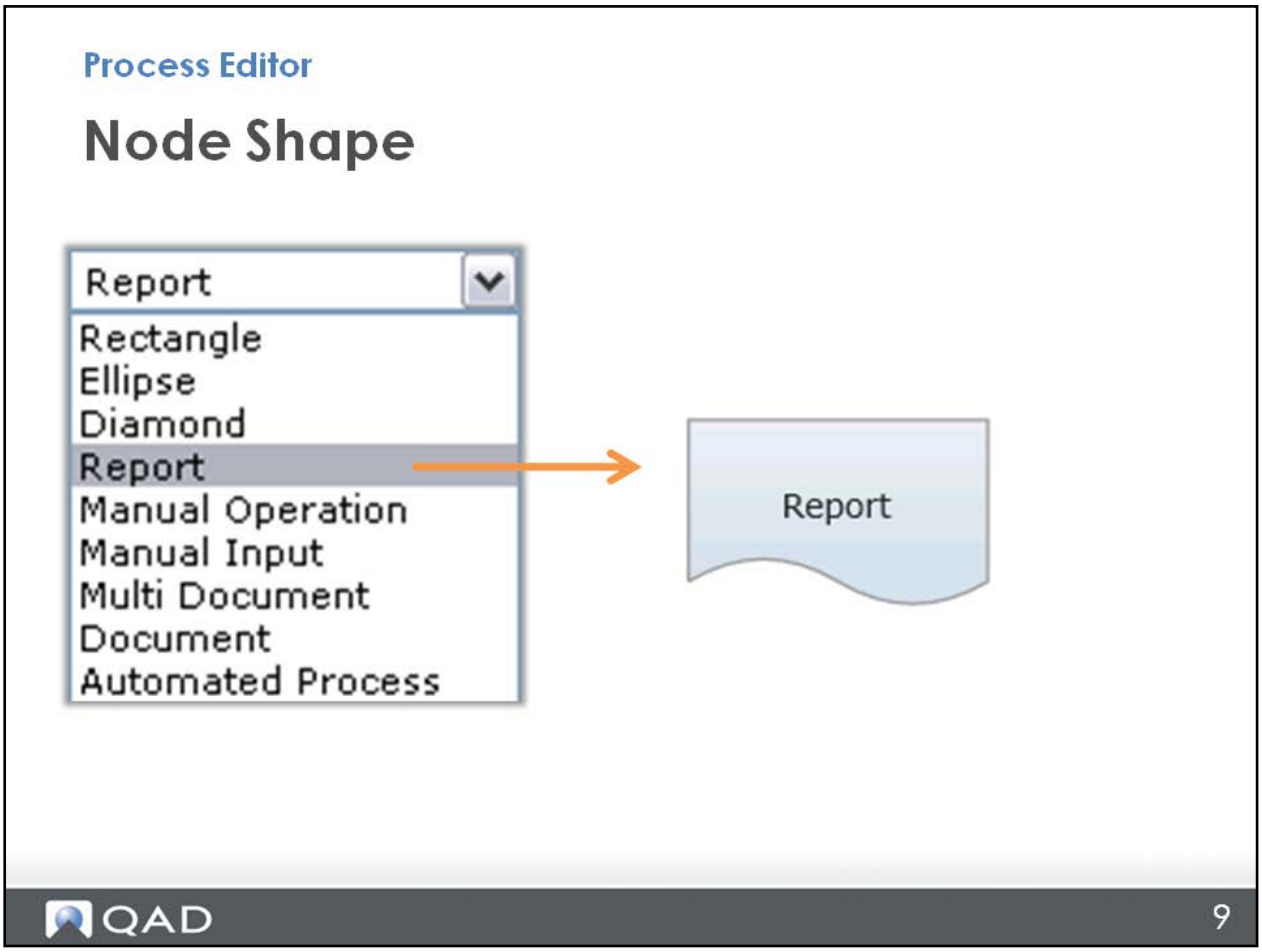
An ellipse represents a process and links to another process map.

Node Shape



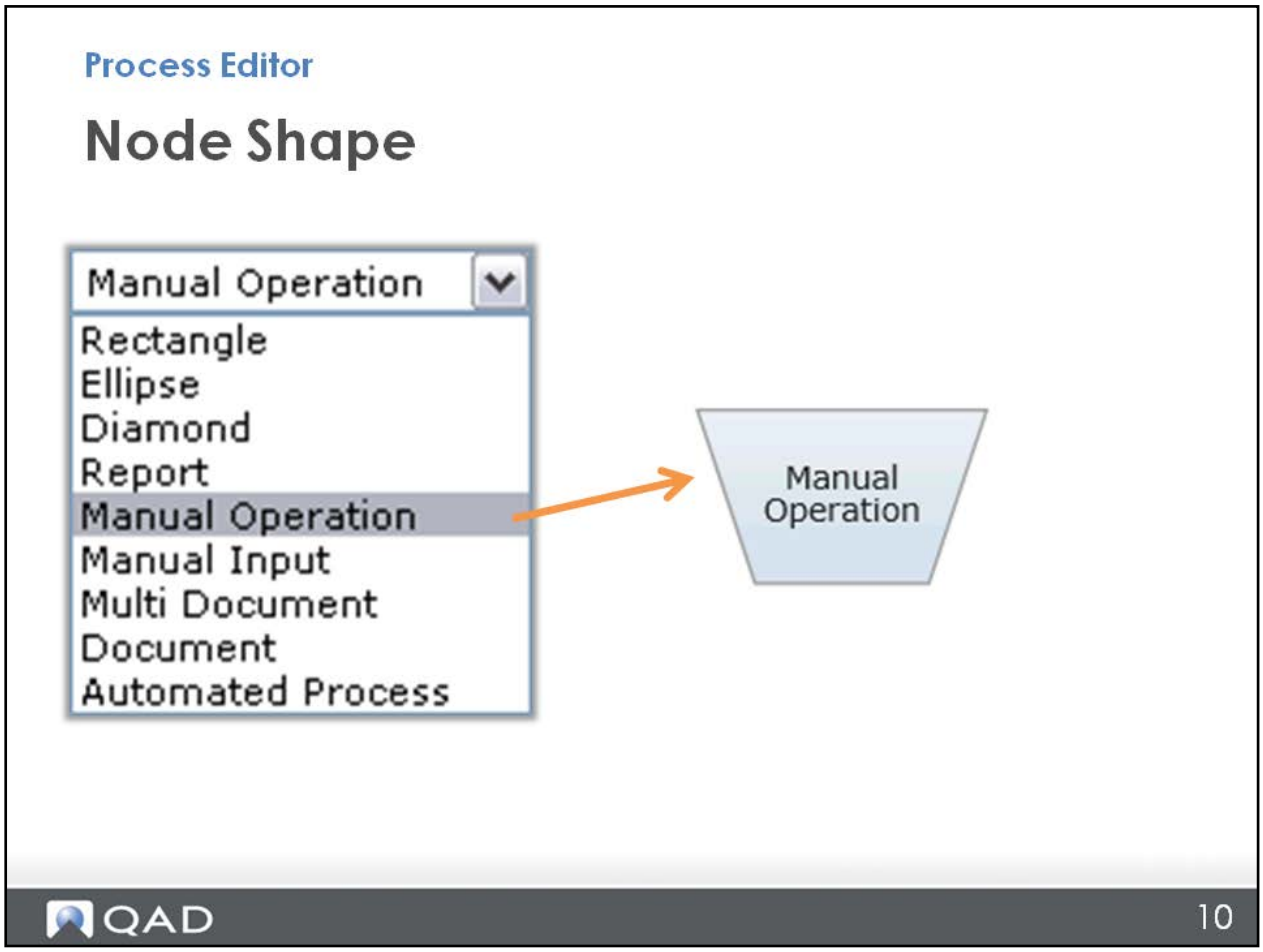
A diamond is a decision point. It visually directs the flow of a map when it can branch in multiple directions.

Node Shape



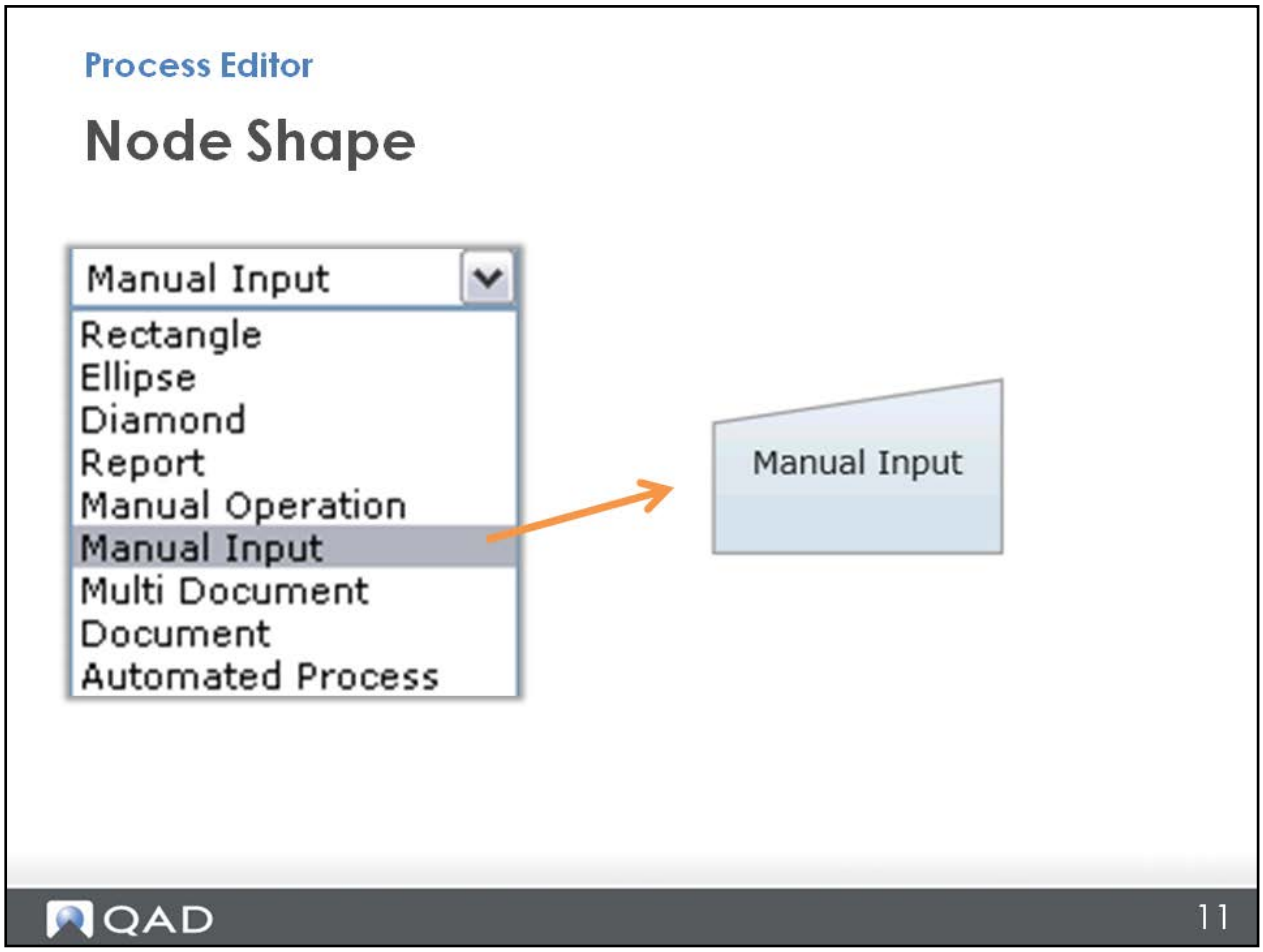
A report shape indicates a link to a report program.

Node Shape



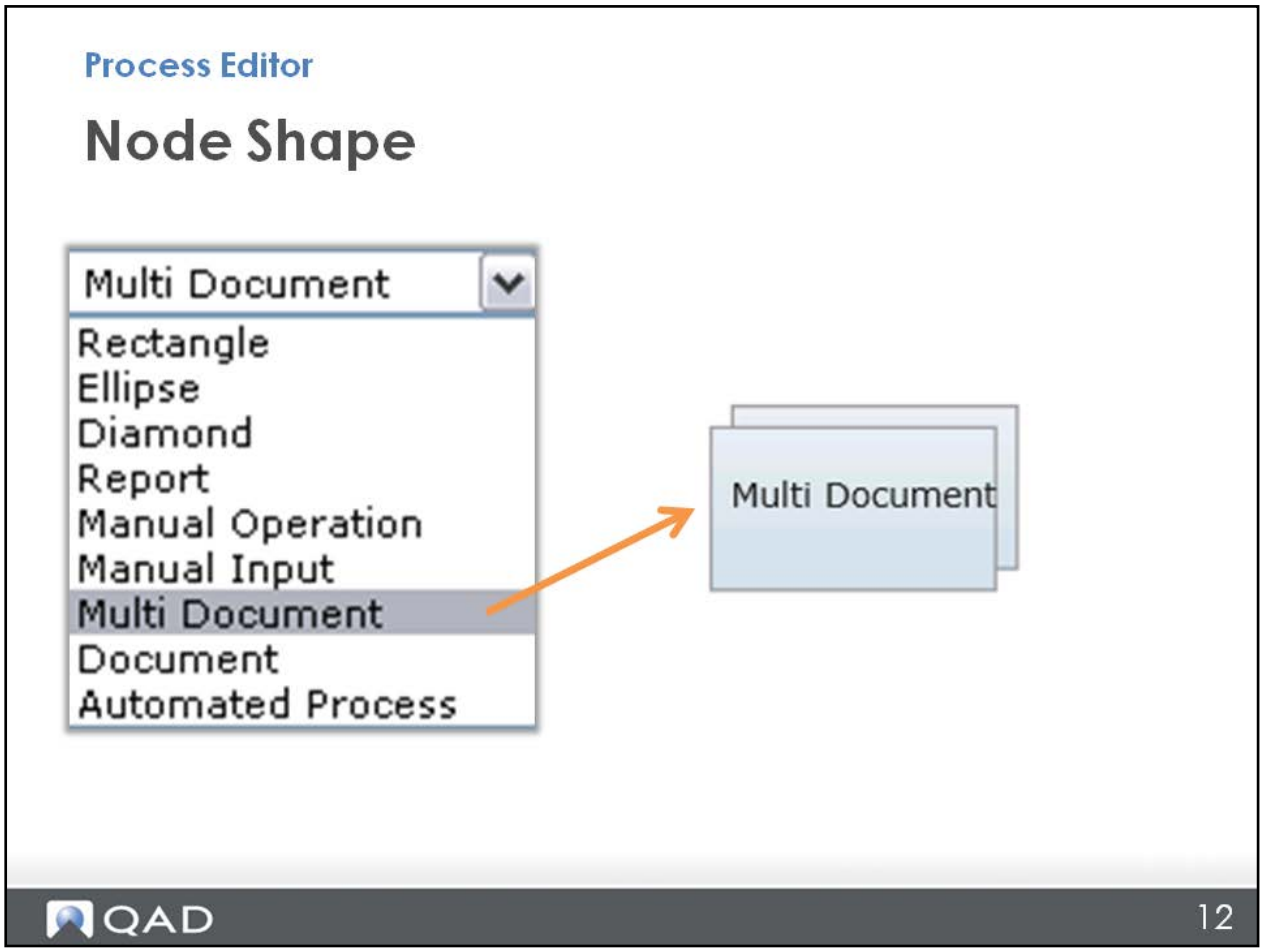
A manual operation shape represents tasks performed outside of the QAD application; for example, external planning.

Node Shape



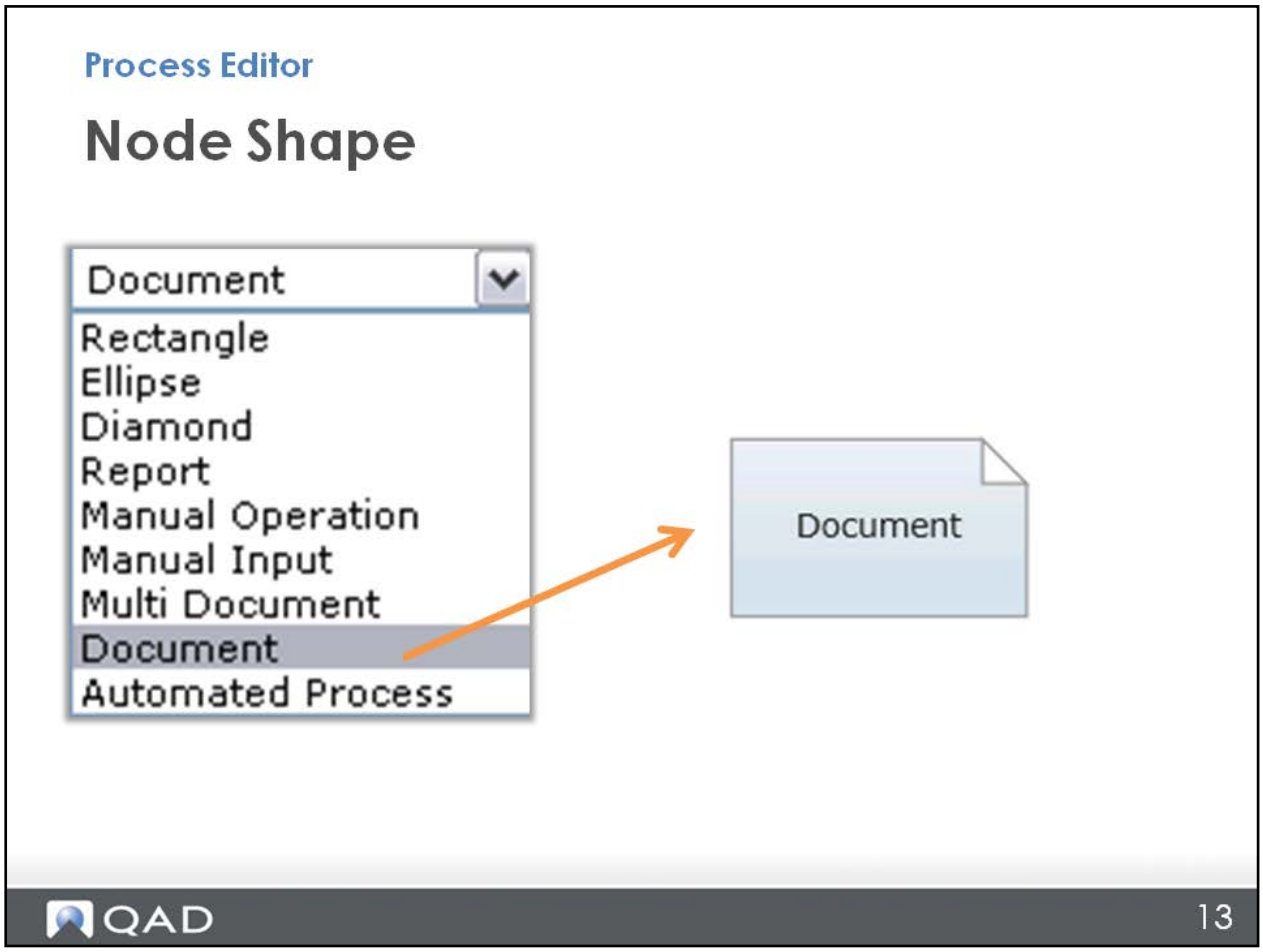
A manual input shape represents inputs to the process from external systems; for example, Electronic Data Interchange (EDI).

Node Shape



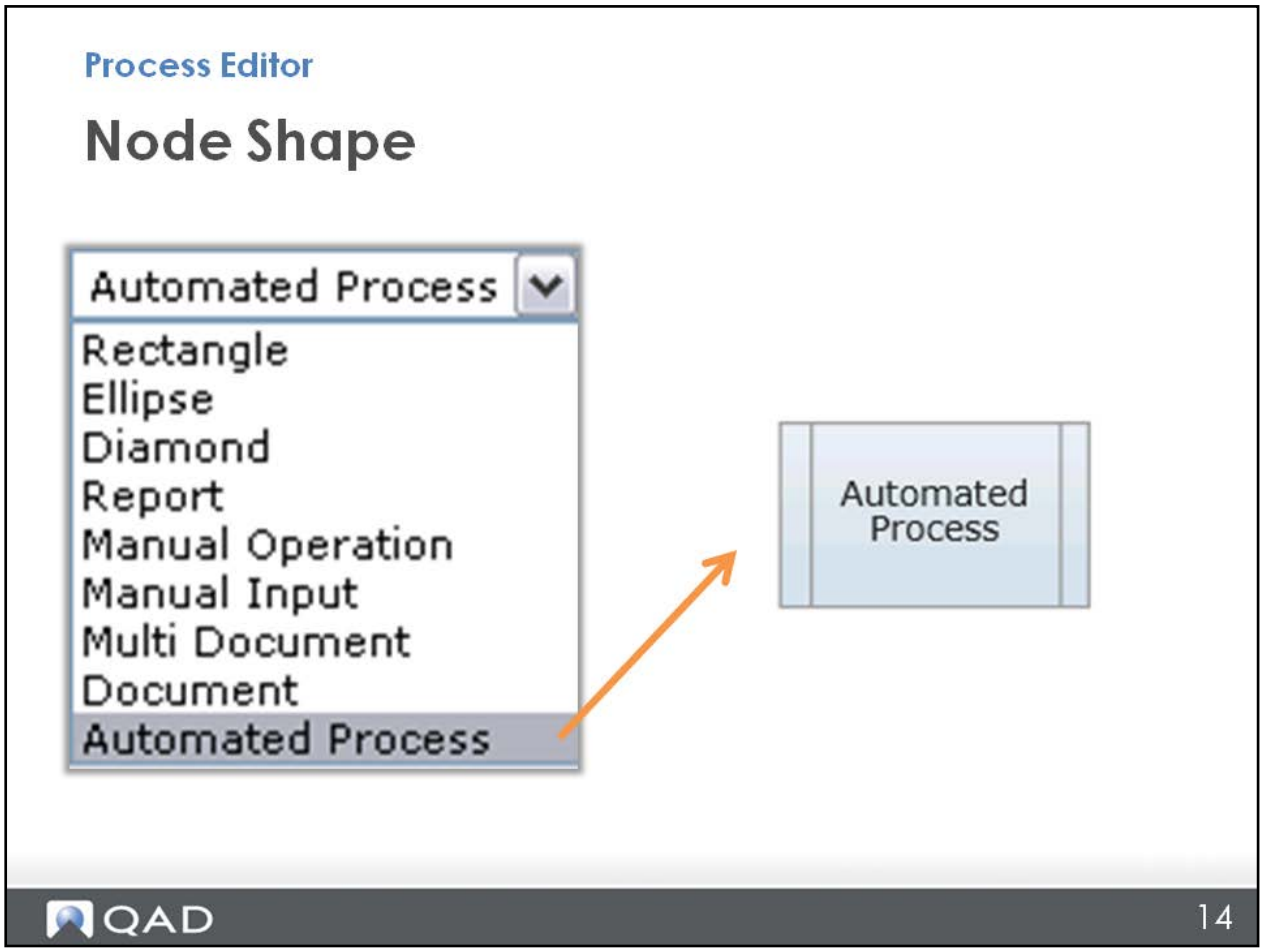
A multi-document shape indicates that there is more than one document linked to this node, or more than one thing you can do on a screen; for example, what you have with collections.

Node Shape



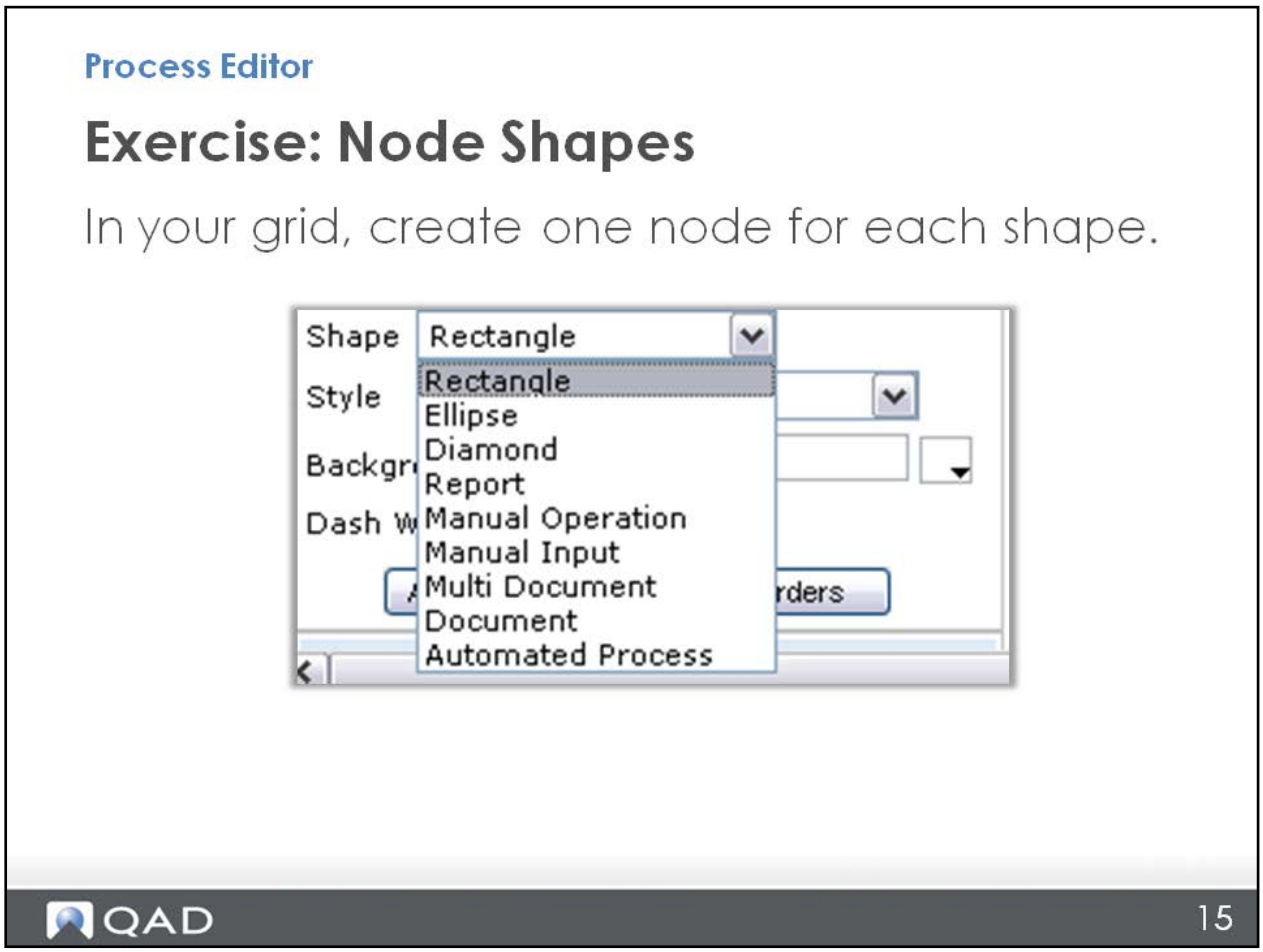
A document shape represents a report or file that is relevant to the task, such as Word documents or Excel spreadsheets.

Node Shape



The automated process shape indicates a link to an automated process.

Exercise: Node Shapes

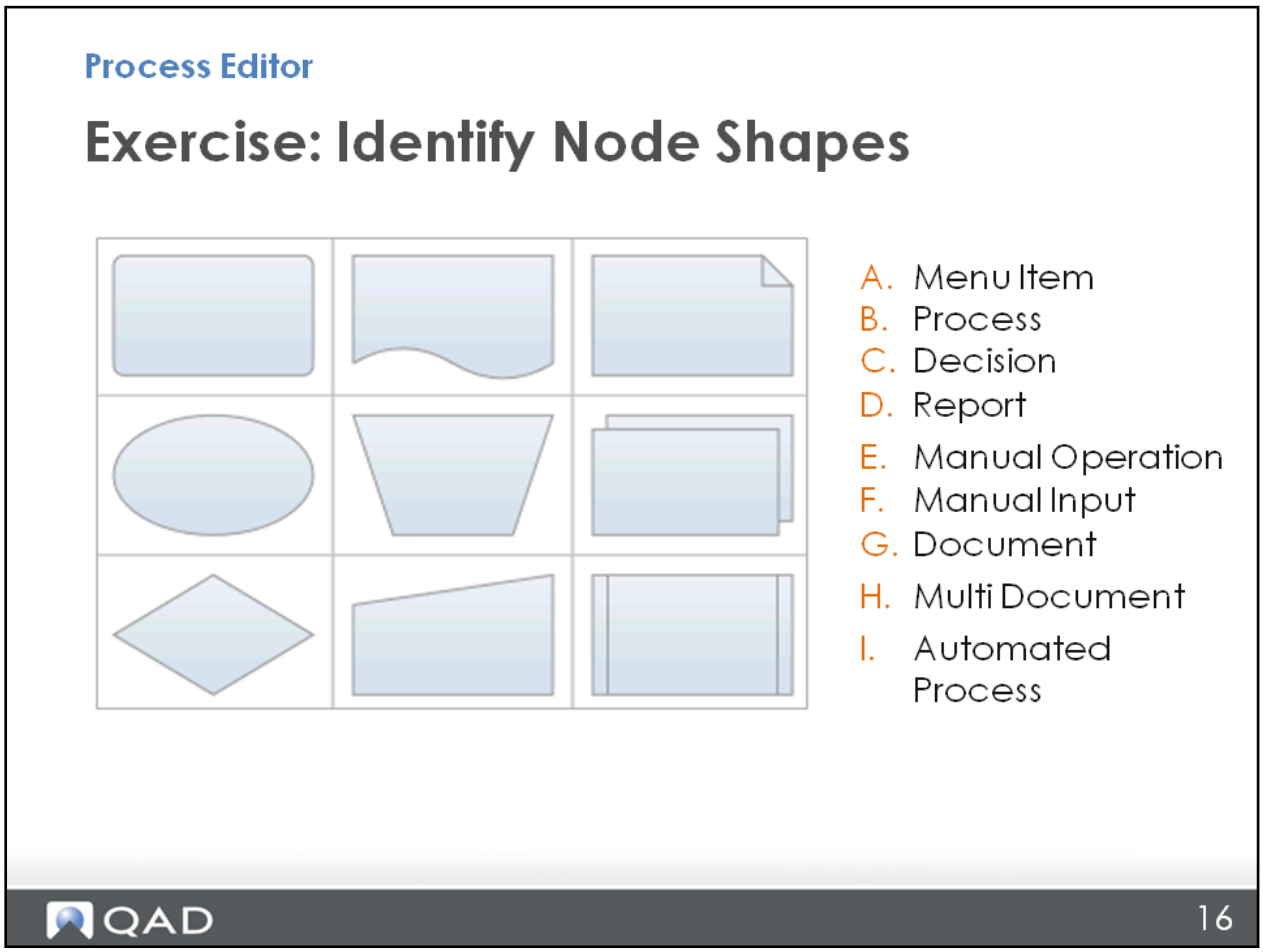


In some cases, the shapes are intuitive; in other cases, you will get used to the shapes as you see them.

To practice with the shapes, do the exercise on the next few slides.

First, on your Process Editor grid, create one node for each shape.

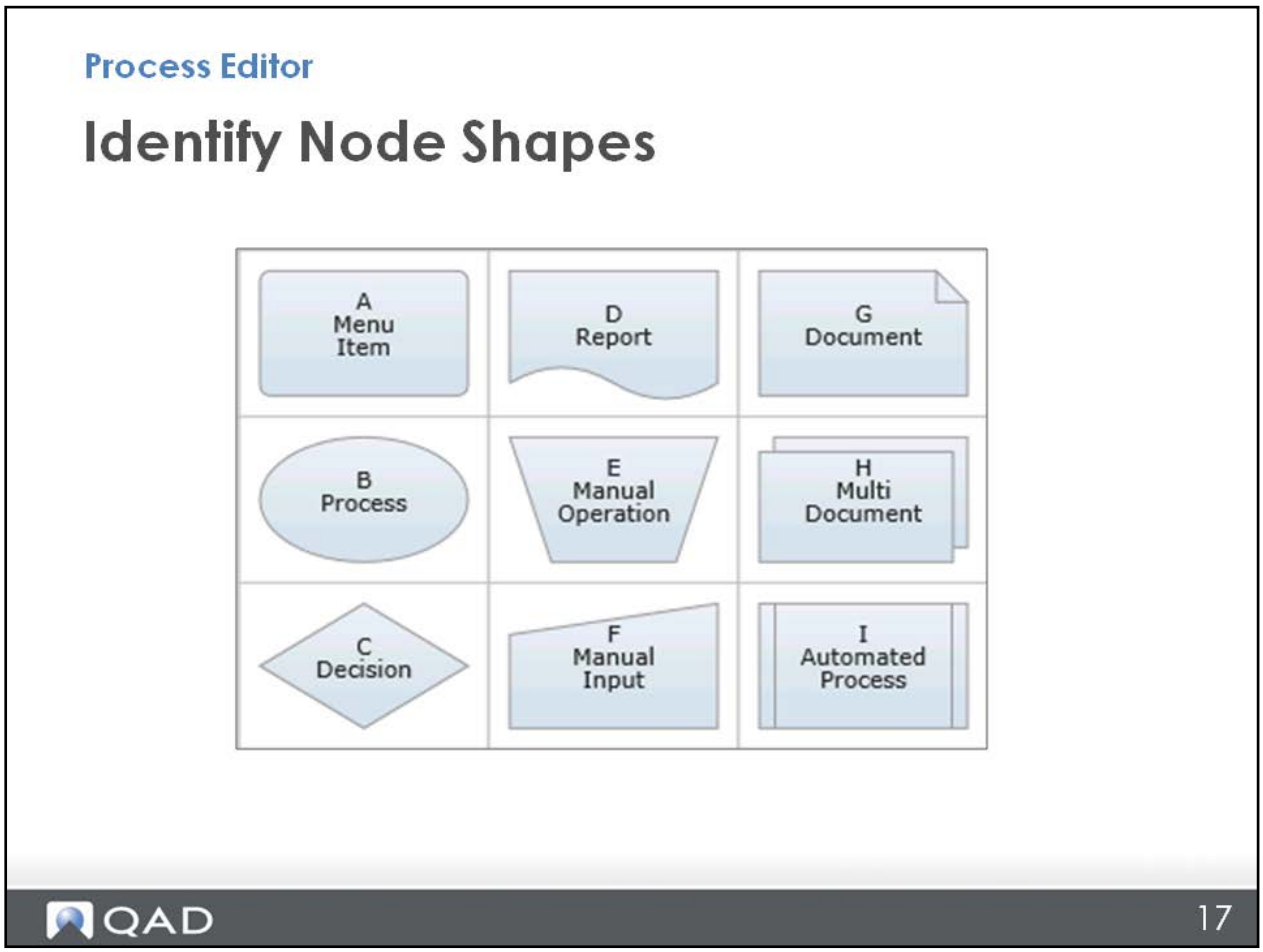
Exercise: Identify Node Shapes



Put the appropriate letter into the shape that represents it.

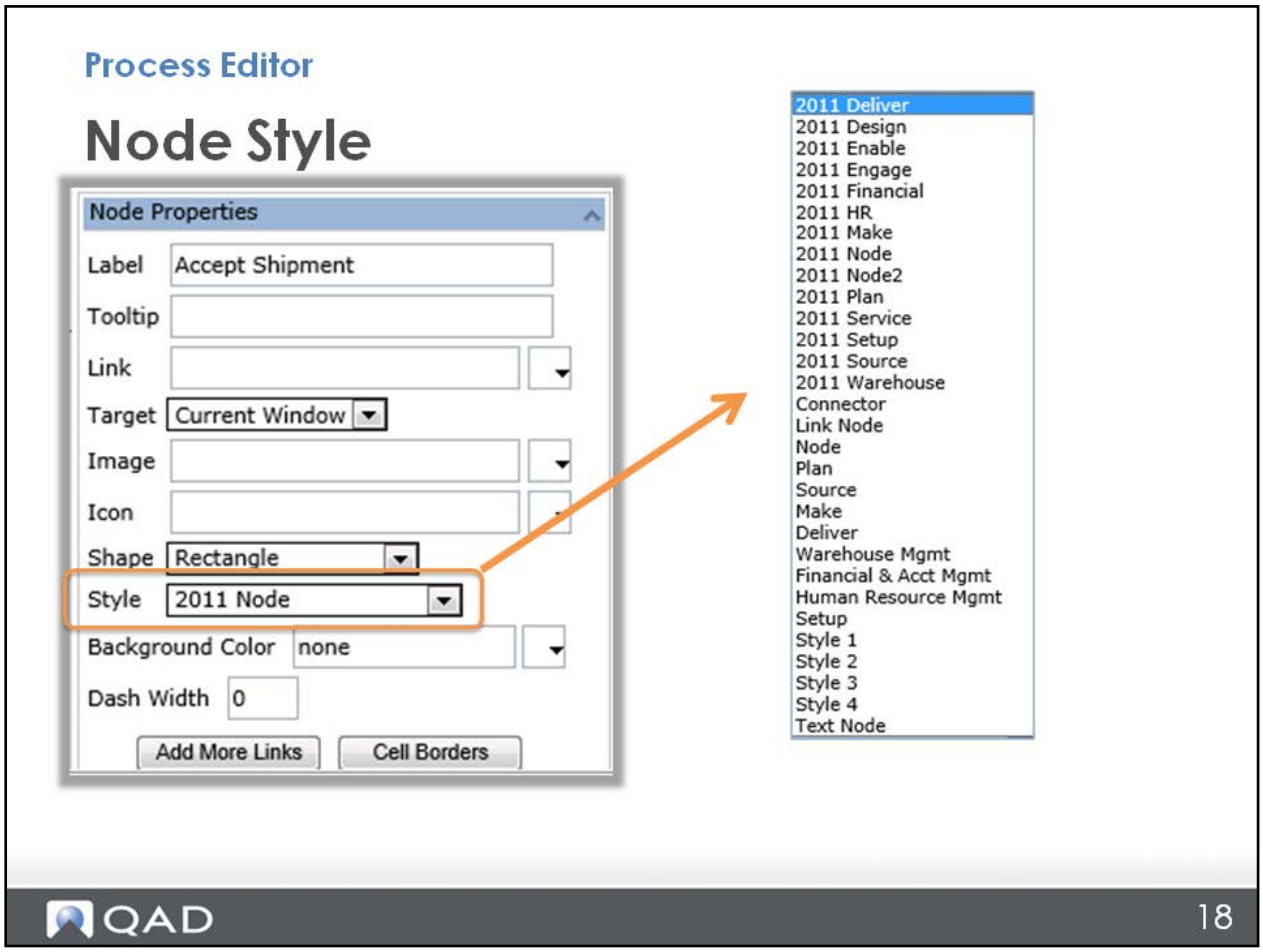
(The answers are on the next page.)

Identify Node Shapes



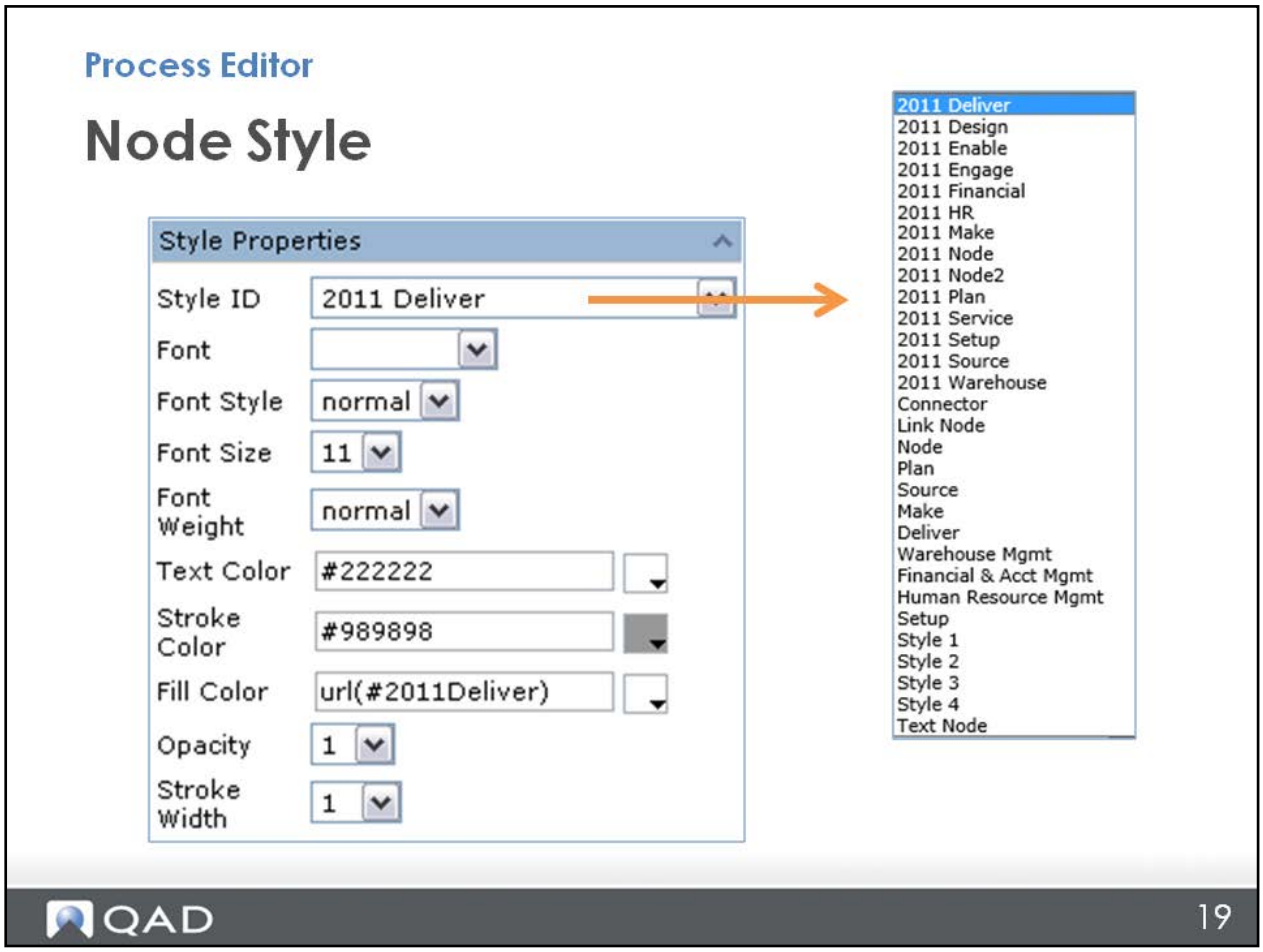
Here are the answers.

Node Style



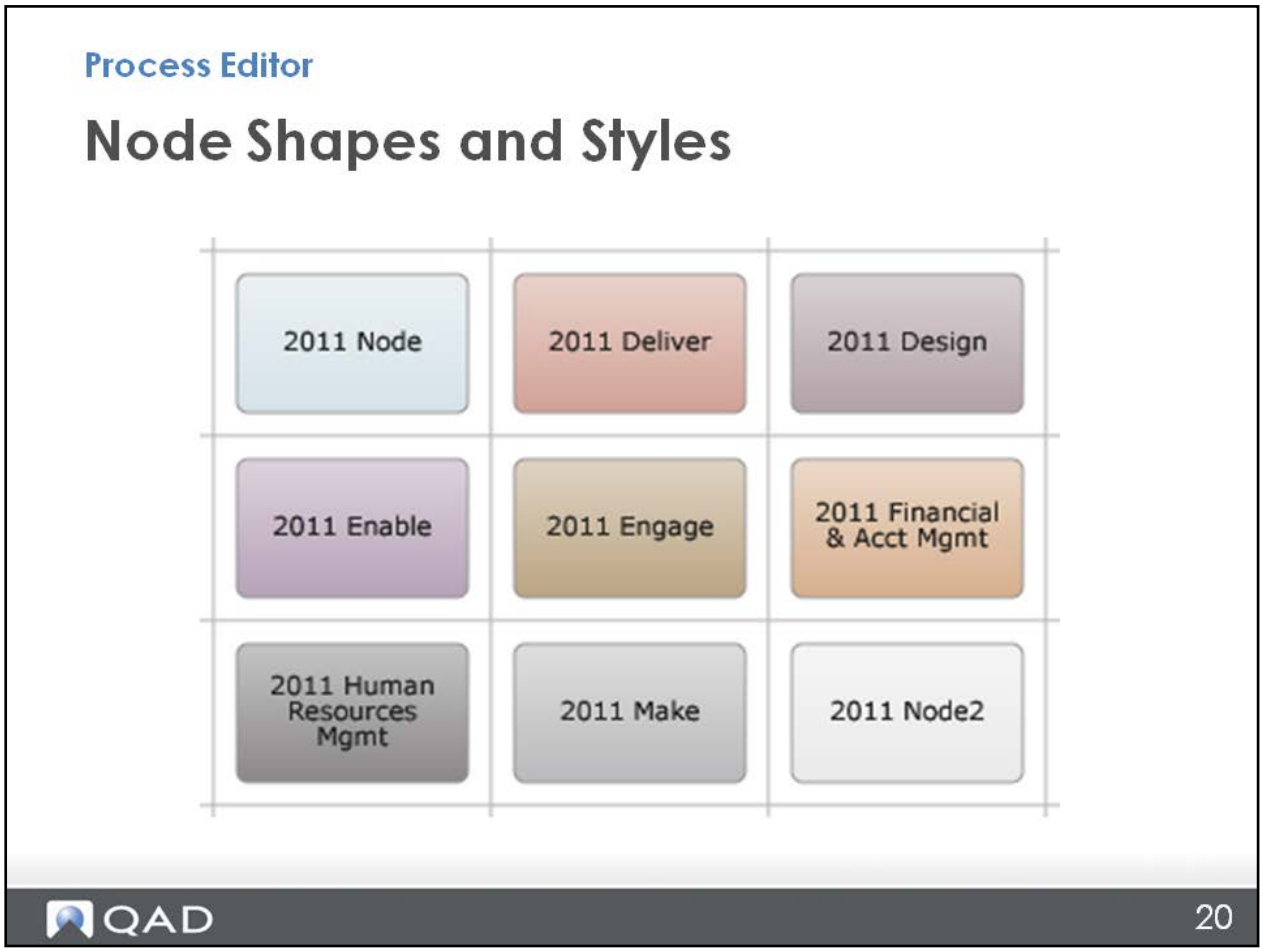
Next, select a style for the node. There are QAD standard styles already made for you to select from the Style menu. Note that QAD already has the SCOR model styles defined for Plan, Source, Make, Deliver, and so on. If the purpose of your node fits into one of those categories, use that. Or there are other node styles available, already defined with a shape, font, and color, so you can simply choose from among those.

Node Style



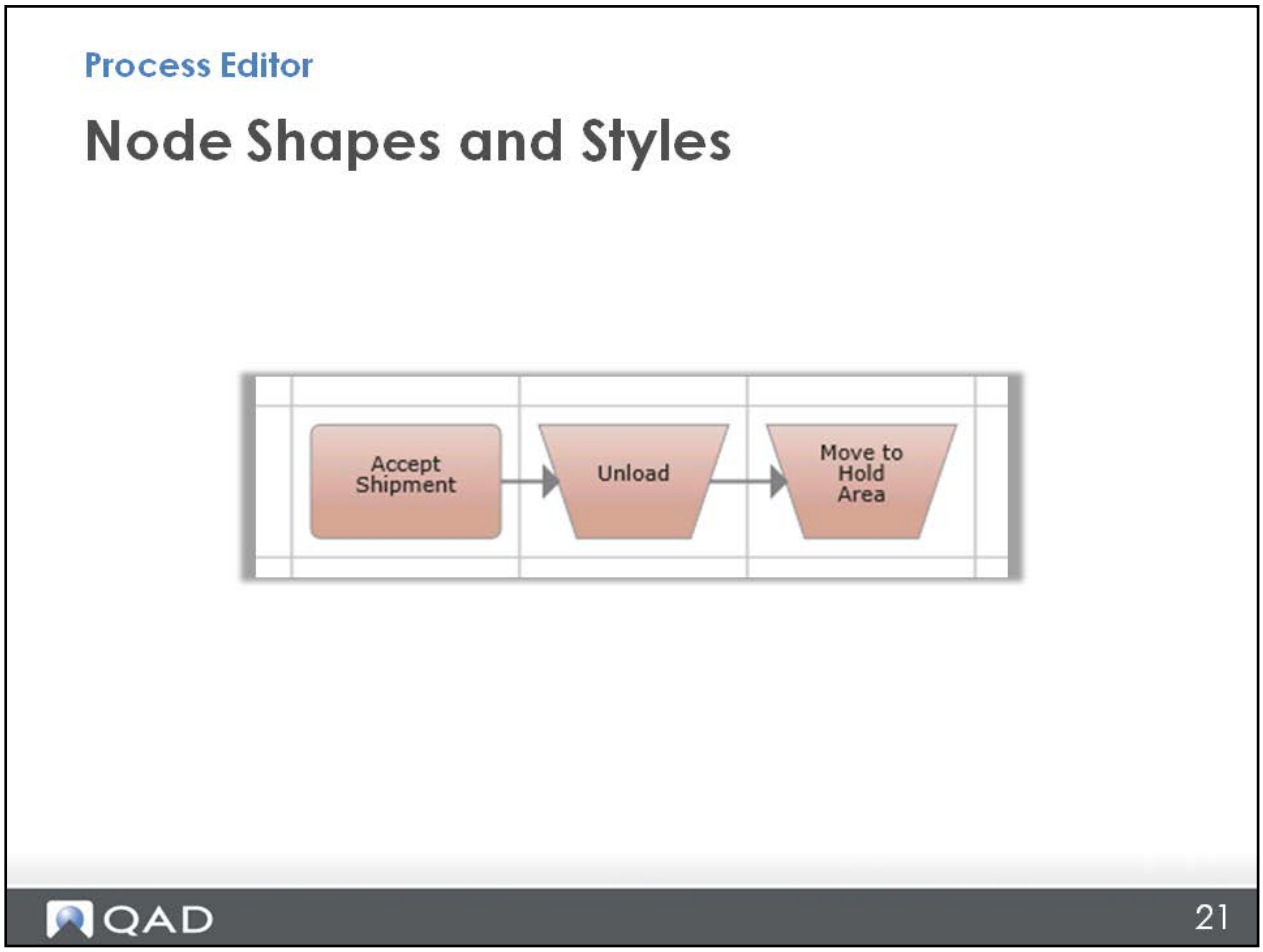
You can define your own style in Style Properties, but you will not do that very often since you already have an extensive list of QAD-defined styles. But you can see here how you can change the font style, size, and weight, the color for the text, and the opacity of the node fill color, as well as the stroke, which is just the border line width.

Node Shapes and Styles



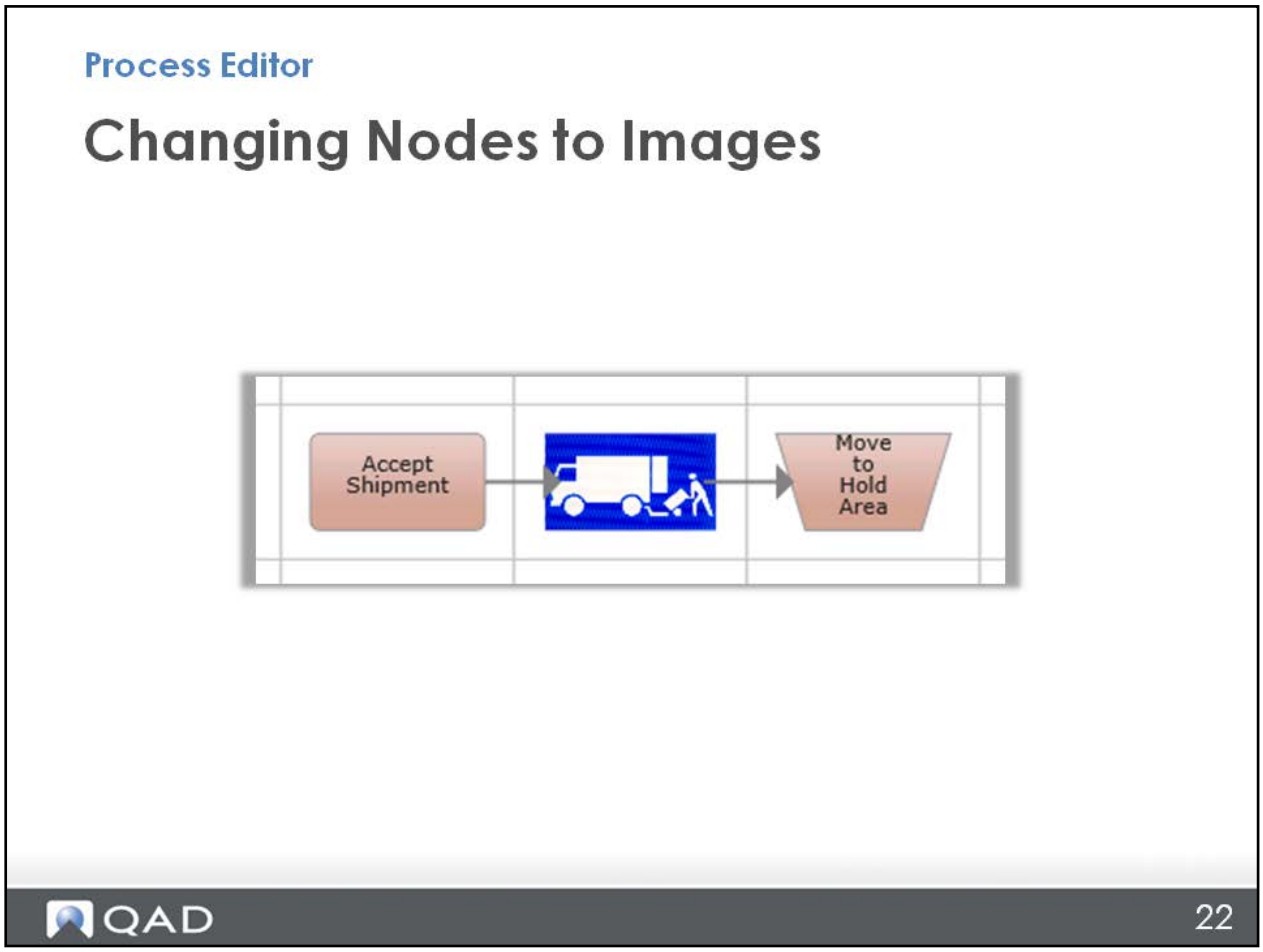
Here is an example of the standard rectangular node with different styles applied to it. For example, if your node pertains to Financial and Account Management, you can use that style.

Node Shapes and Styles



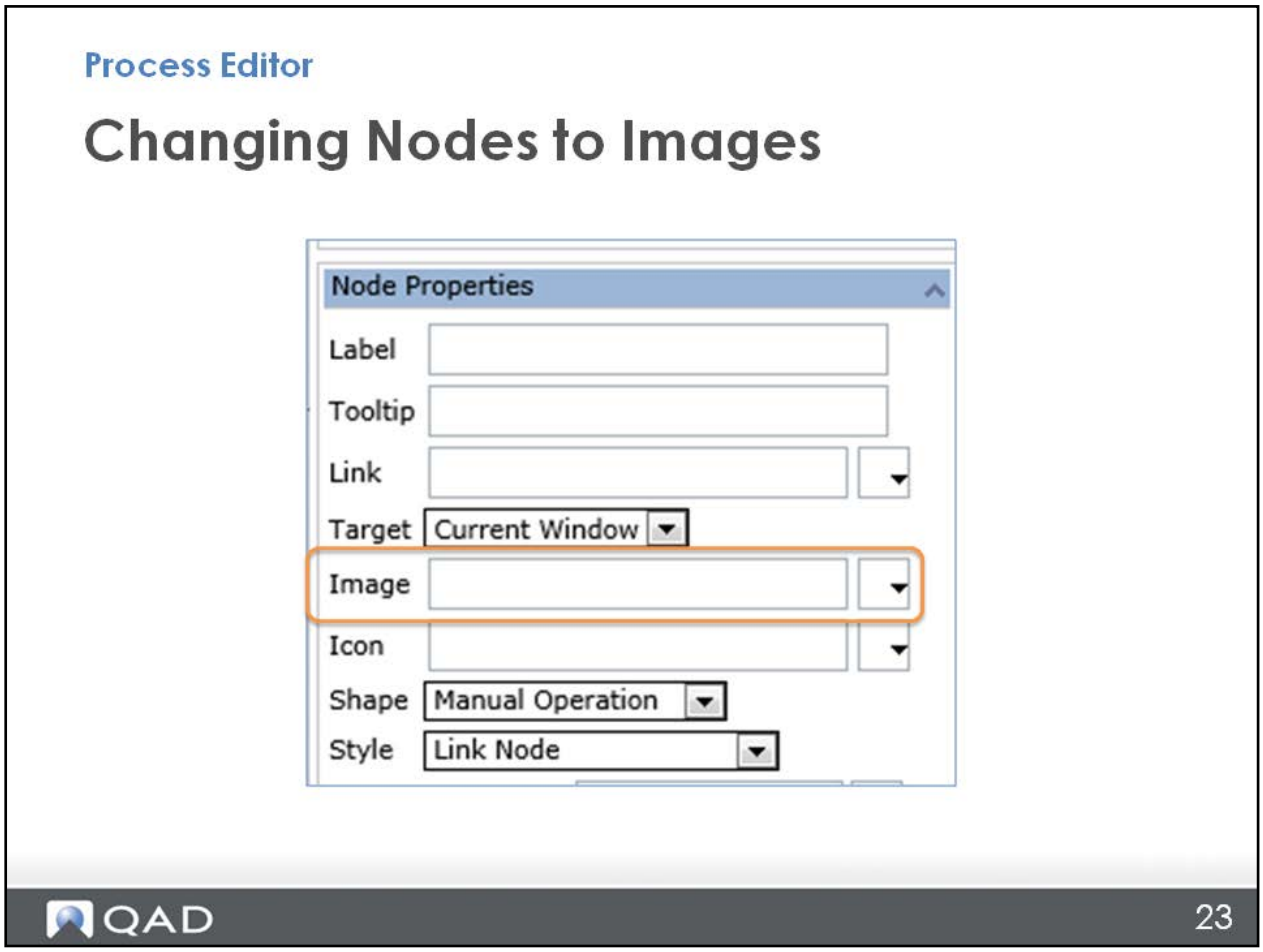
Here are the three nodes, now with a style applied (“2011 Deliver” style in this case). The first node’s shape shows that it will take you to a screen, and the other two shapes refer to manual processes.

Changing Nodes to Images



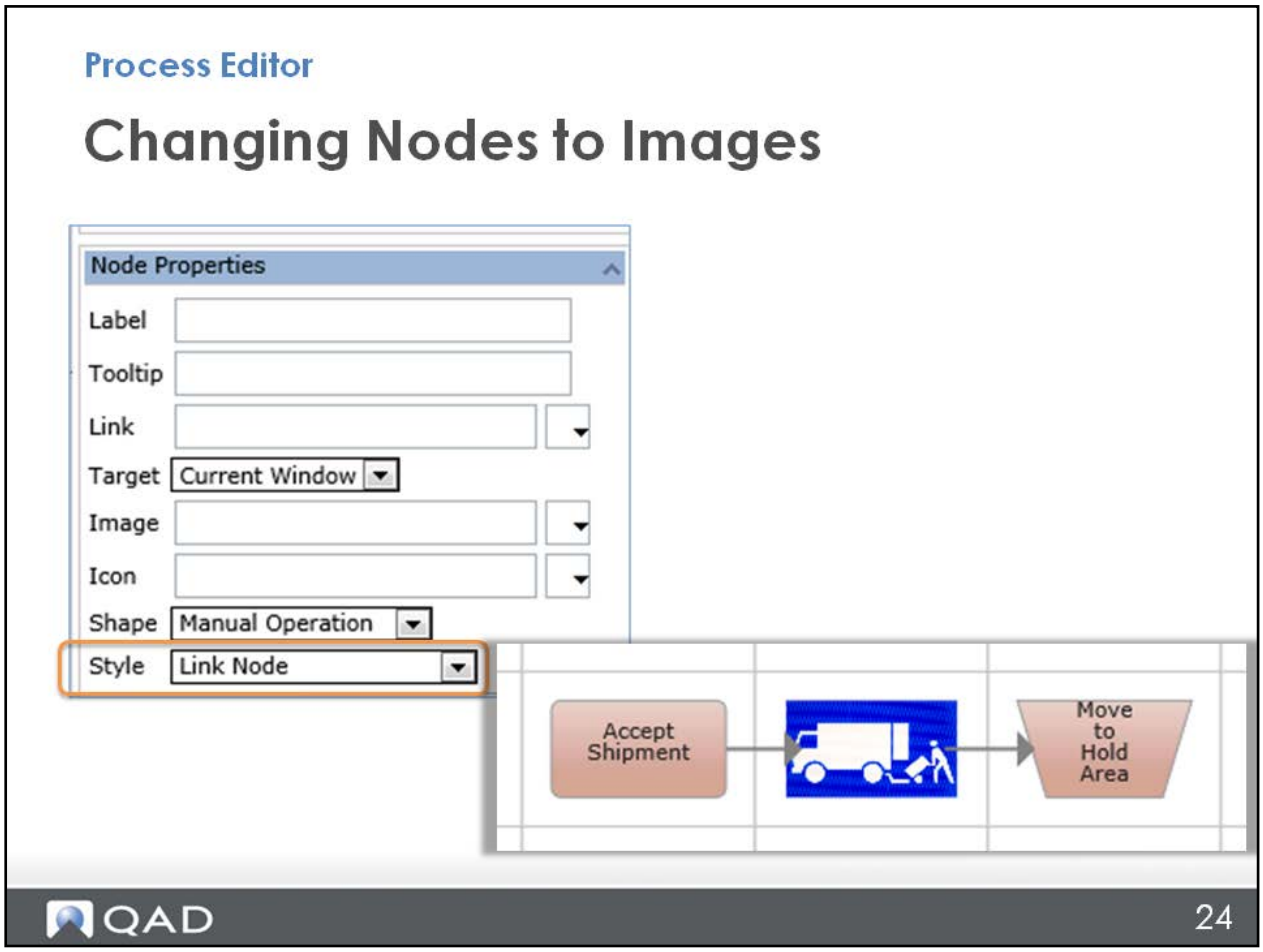
Remember, a picture is worth a thousand words, so sometimes an image conveys the meaning of a node easier and better than text. You can change the nodes into images to show what they mean. For example, you could make the node for “unloading” an image instead. This gives the idea of the truck being unloaded, without text.

Changing Nodes to Images



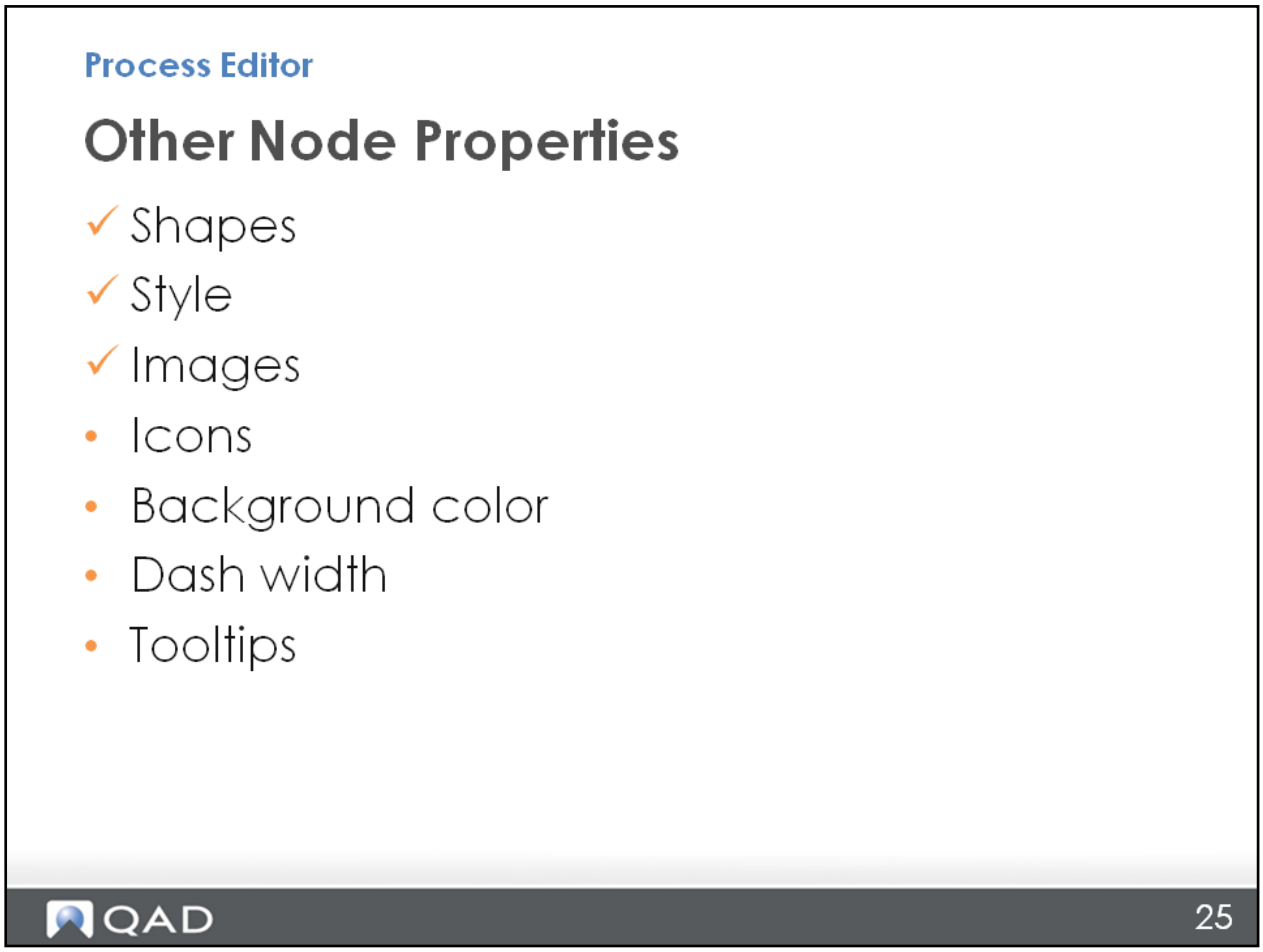
Designate a folder to store images that everyone can access and use consistently in the process maps.

Changing Nodes to Images



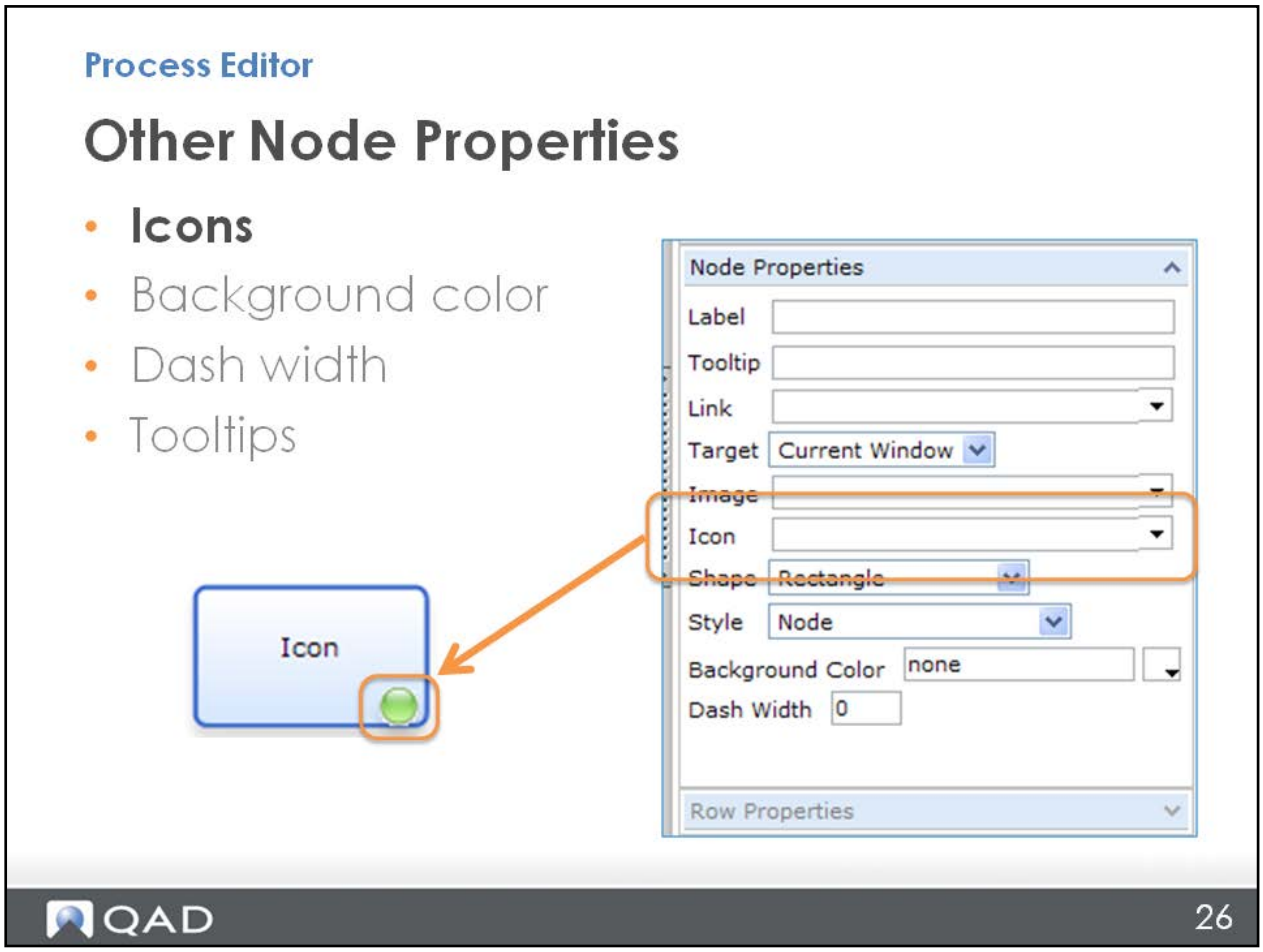
Once your image is inserted, change the style of the node to Link Node to remove any other node shapes and optimize the image for use with the connectors that will go between the nodes.

Other Node Properties



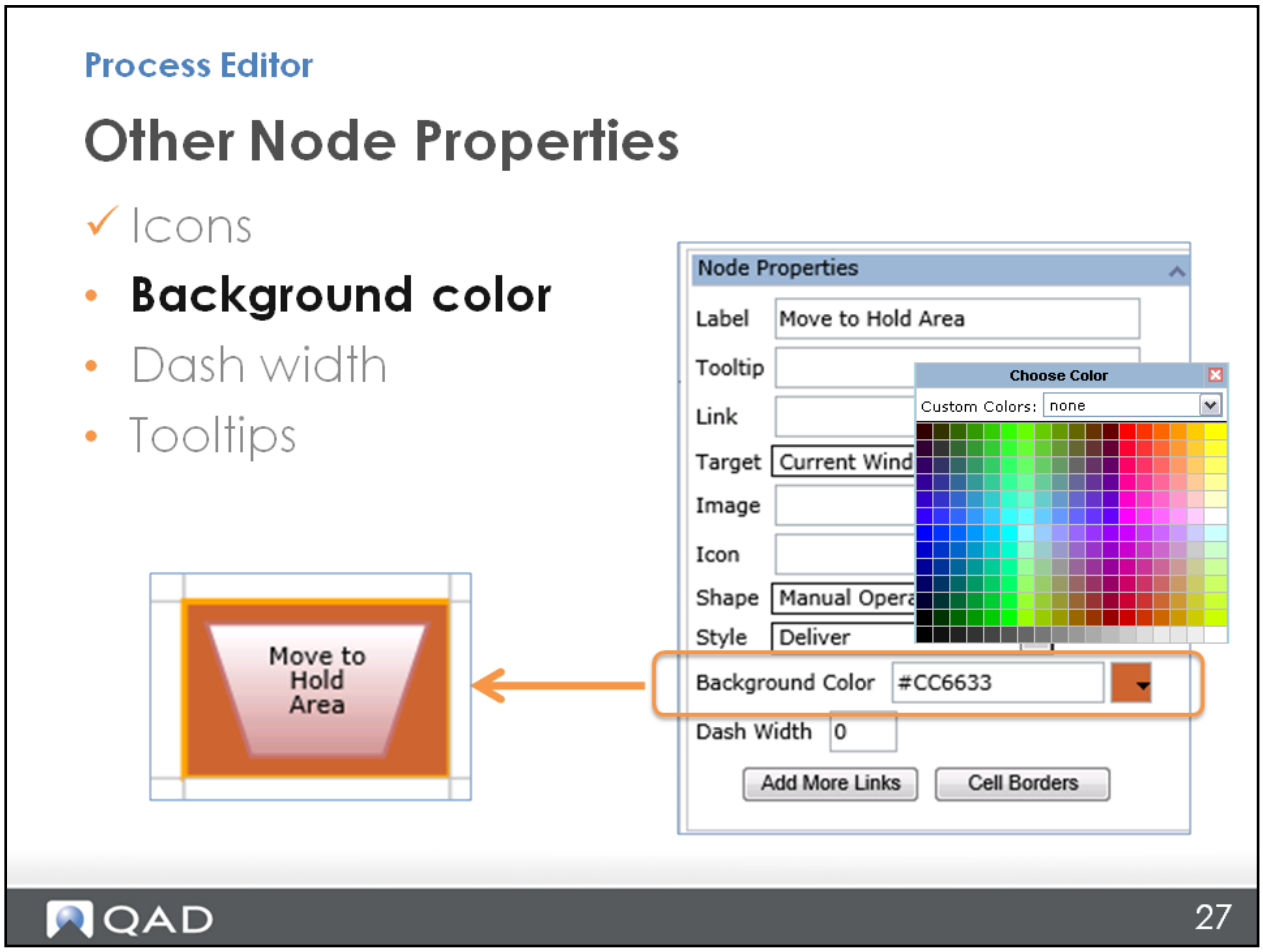
Here is what you have learned so far: shapes, style, and images. There are a few other miscellaneous topics to learn about node properties: adding an icon to a node, or a background color; changing the border of the node to a dash line; and entering a tooltip – some text that will pop up when you hover your mouse over a node to give you a little supplemental information.

Other Node Properties



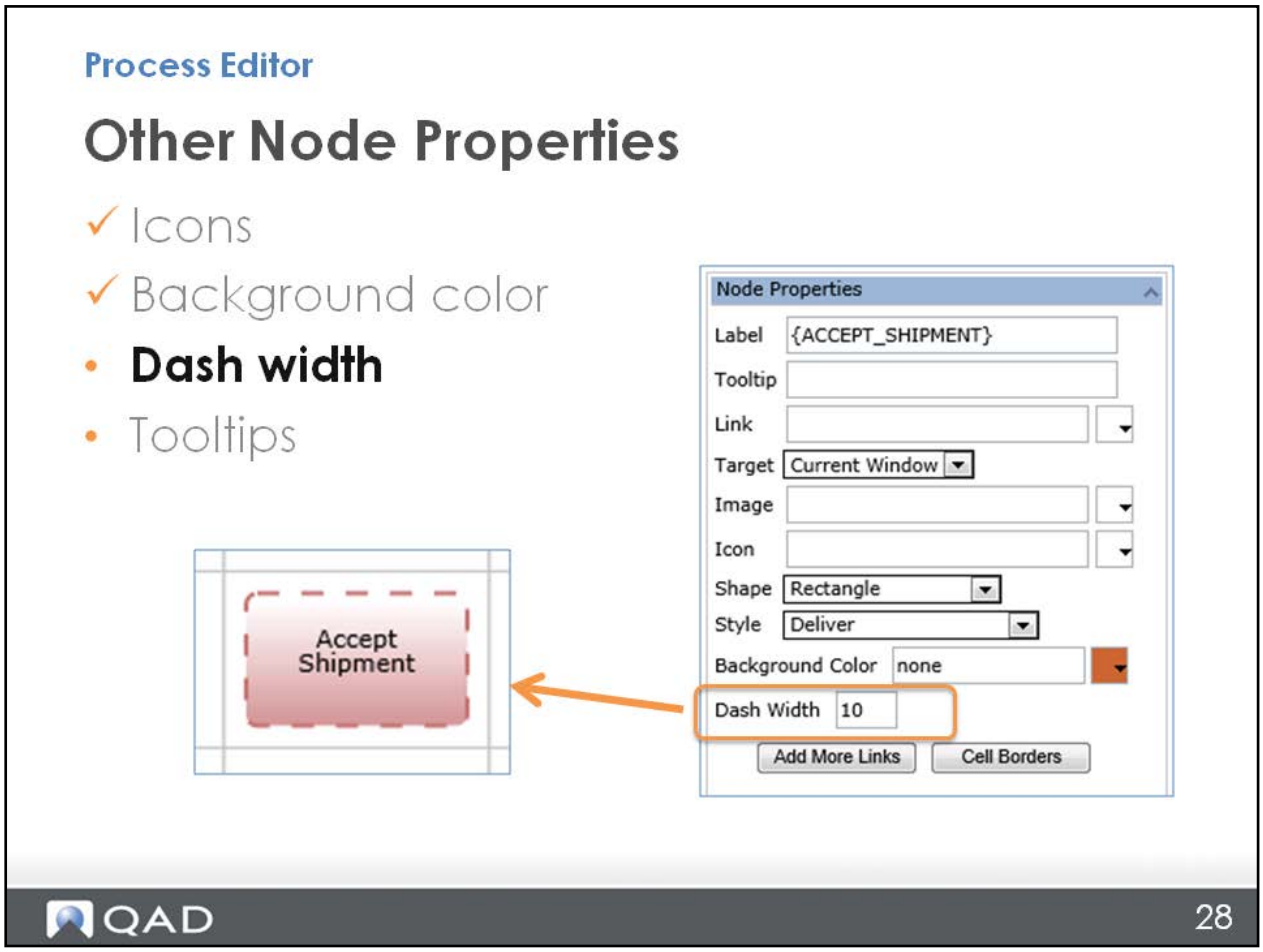
You can select an icon image to display in the lower right-hand corner of the node, much the same as you would add an image – just select the icon image from a file on your computer.

Other Node Properties



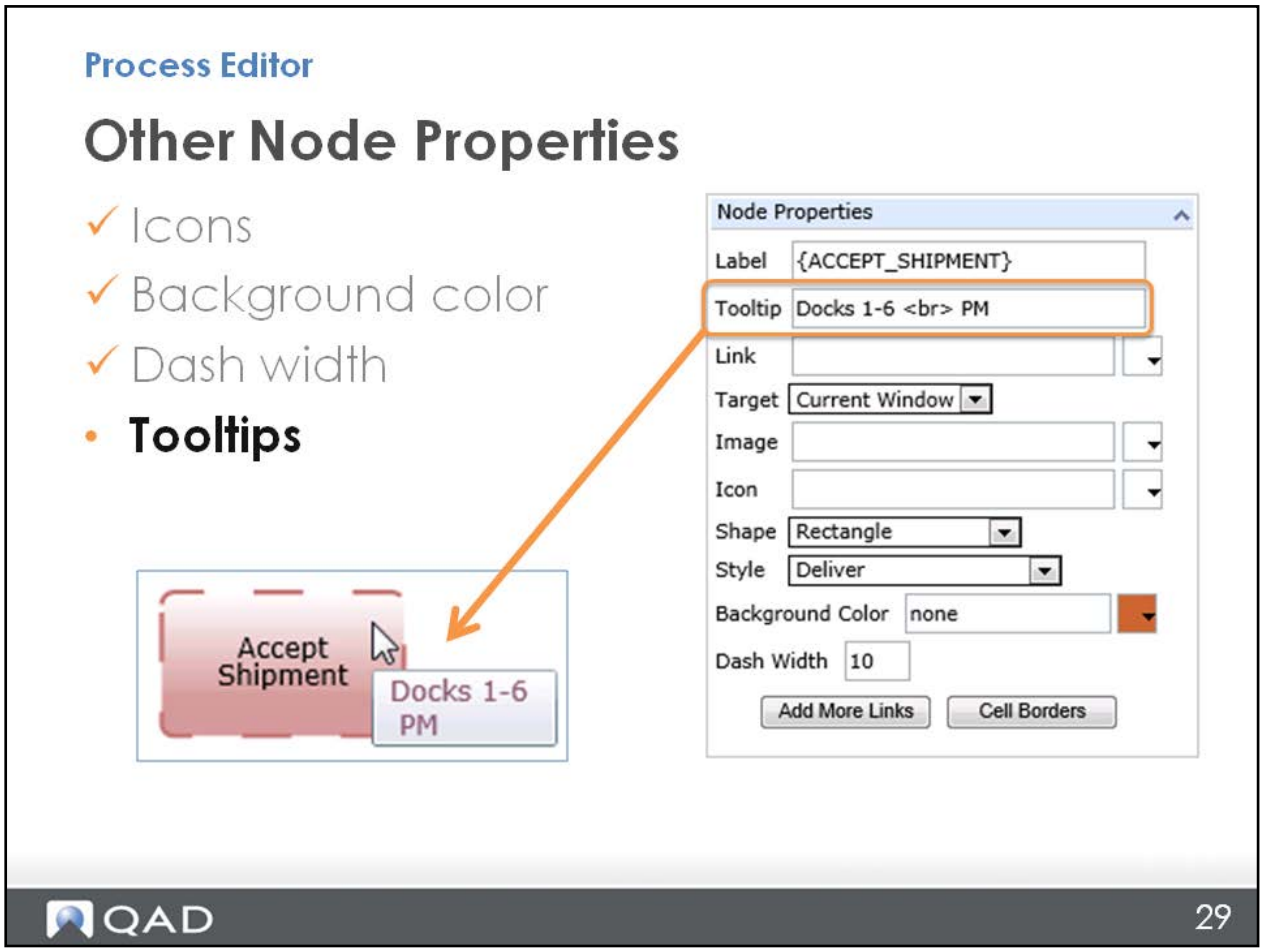
You can change the background color of the cell. Select the colors from the Background Color drop-down menu.

Other Node Properties



You can change the node border from a solid line to a dashed line, specifying the preferred dash width.

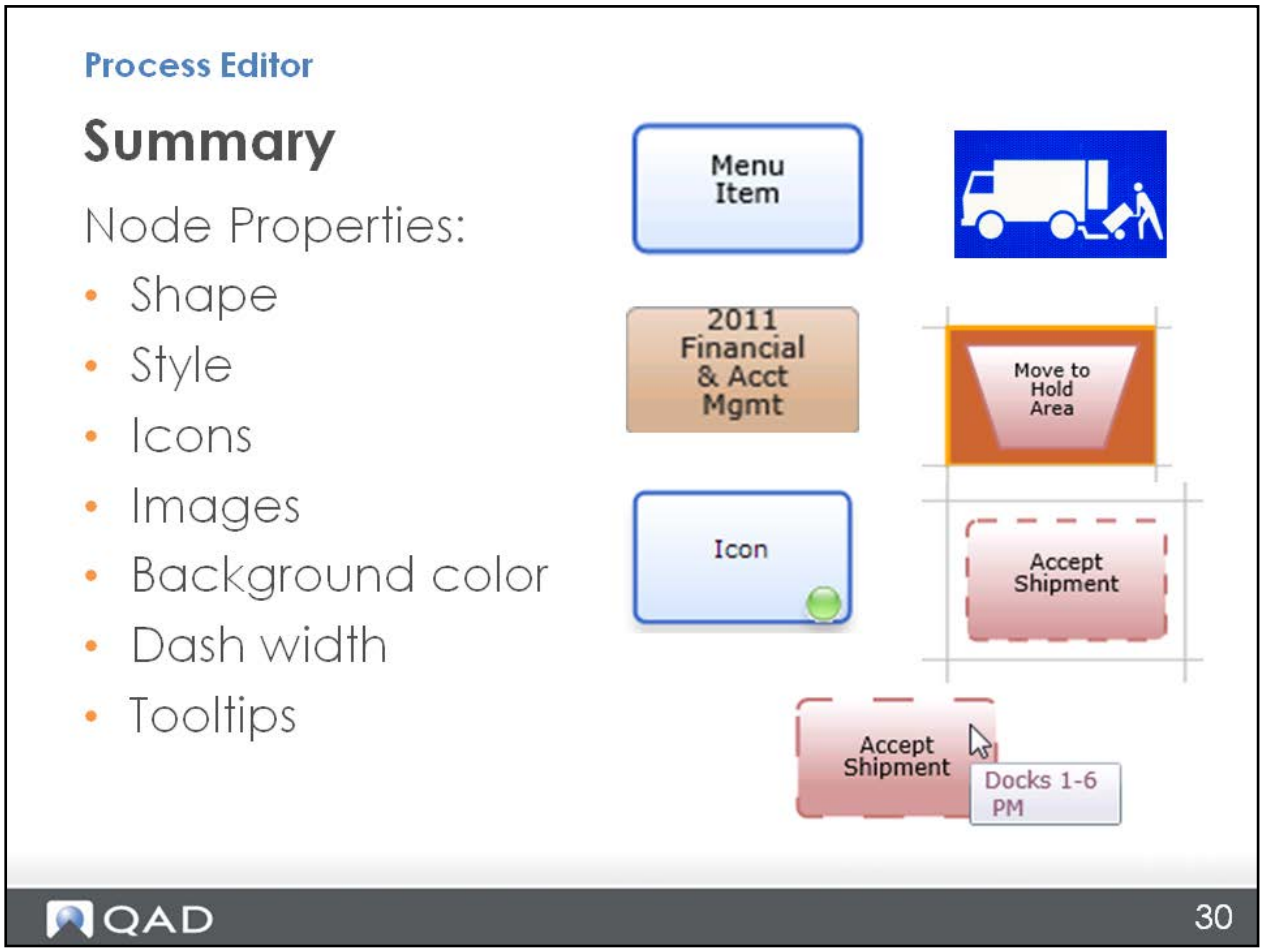
Other Node Properties



You can enter a tooltip so that some words pop up when you hover your mouse over the node – maybe this would be a helpful tip or a bit of explanation about the step. These tooltips are brought in from the same place as the node name/labels that you enter into Process Label Maintenance. You can look those up and use them consistently here, too.

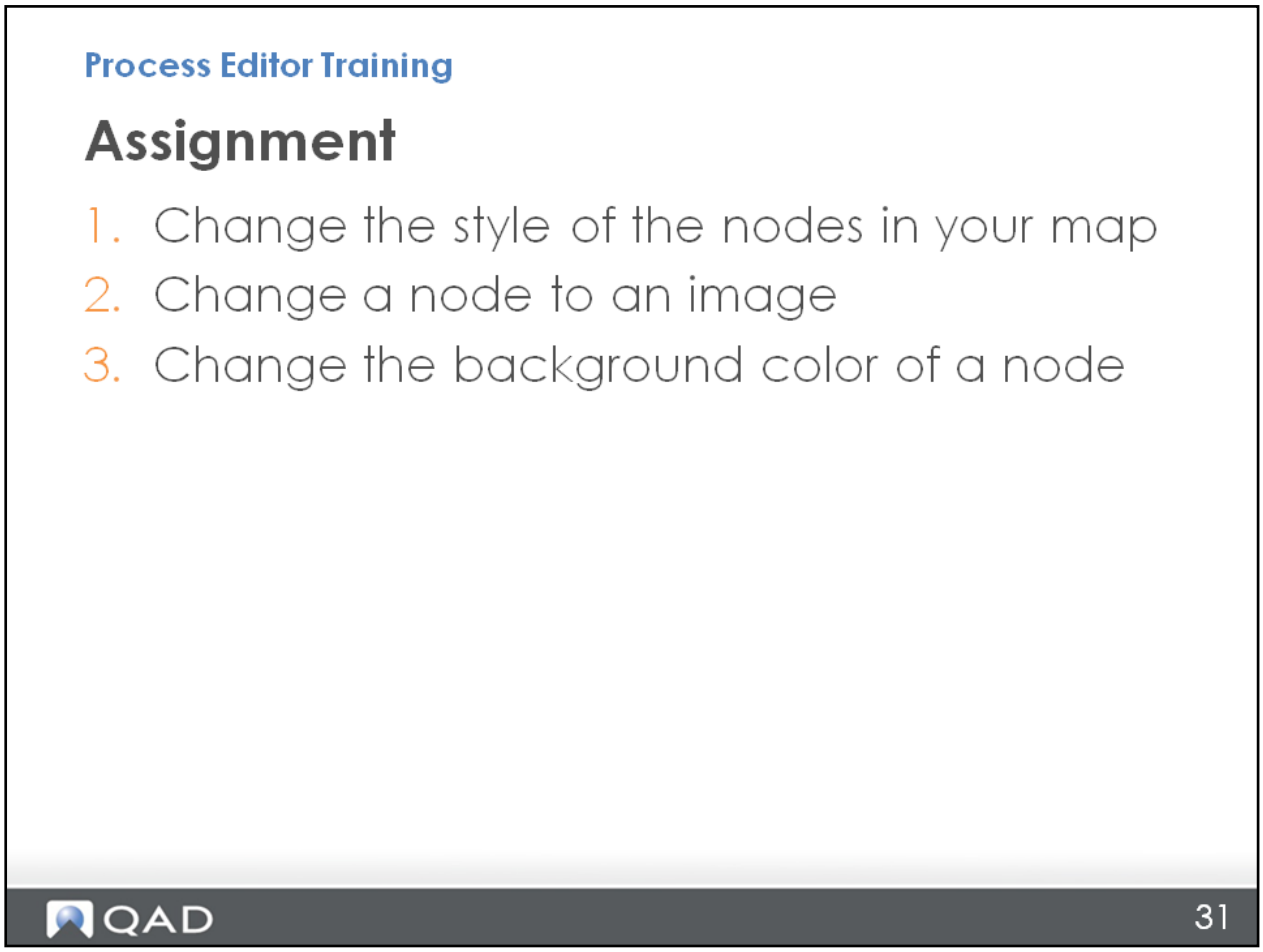
If you need more room, you can specify a line break (so the next line of text moves down a line) by using a
 after the last word on the line. Note that you can have up to four lines.

Summary



This section has covered different shapes and styles that you can use for a node so you can visually show its purpose. You learned how to change a node into an image and add an icon. You also learned how to change the background color of a cell and the border of a node to become a dashed line.

Assignment



Here is the assignment.

CHAPTER 4

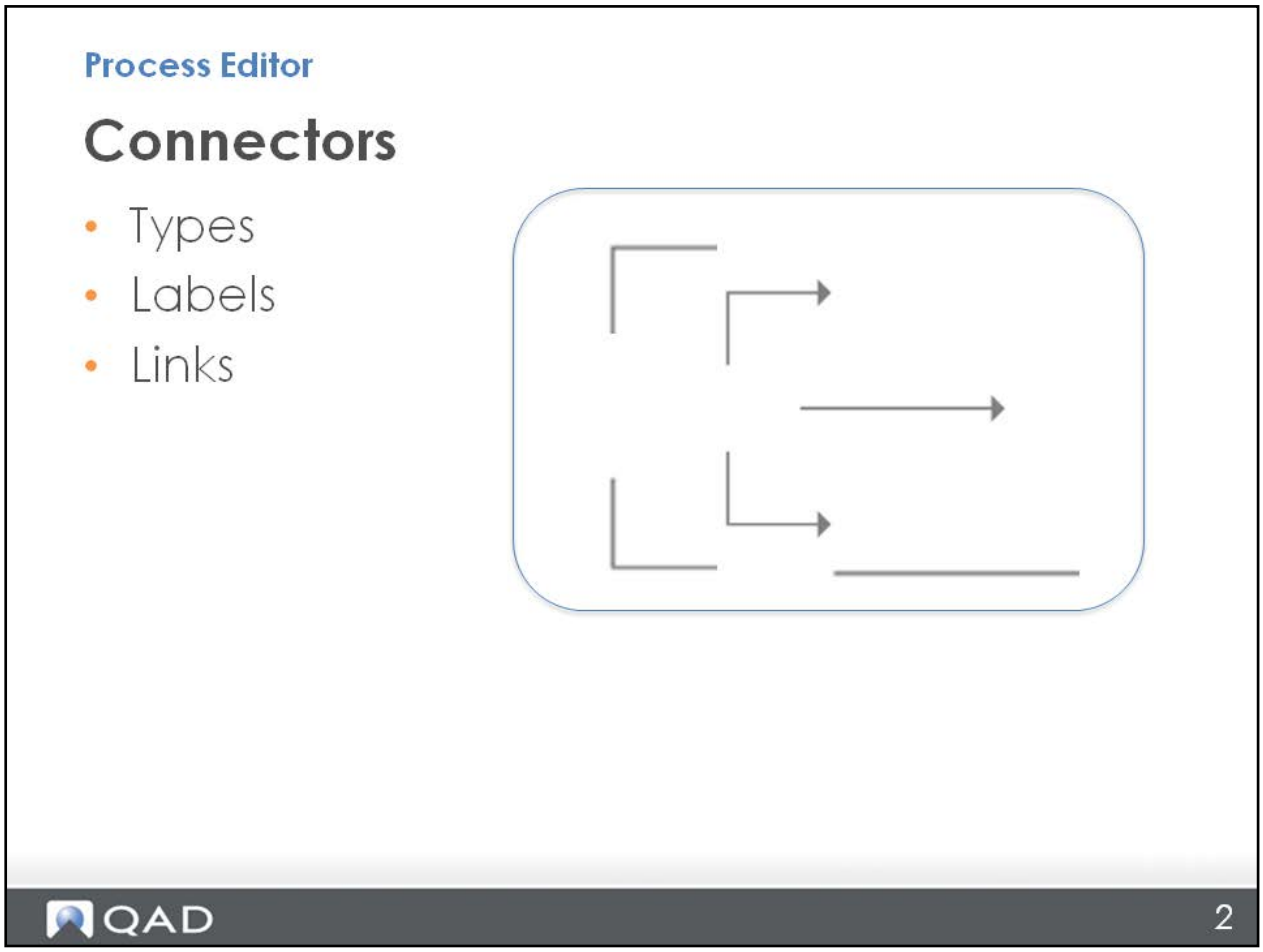
Connectors

In this section, you will learn about the different options available for connectors.

To watch a video of this section, go to the Learning Center (http://learning.qad.com) and use the Smart Search tab to search the key words “Process Editor.” Take the fourth section (4 of 9) called “Connectors,” Course # OLT-006860.

Or, if you are already logged into the Learning Center, just click here:
https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?selectTab=OLT+Activities

Connectors

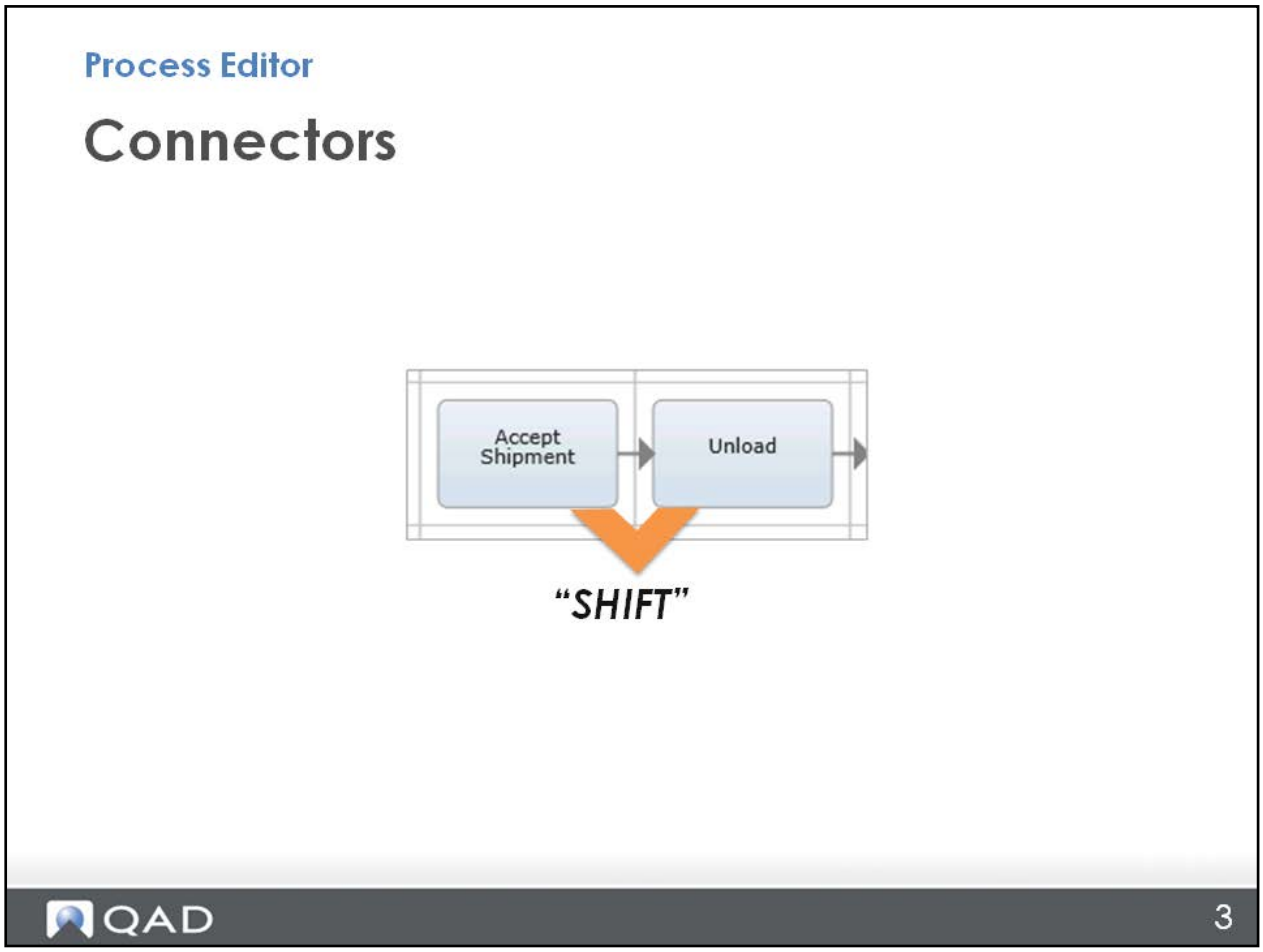


As you know, connectors are lines or arrows indicating the order for doing the steps in the process.

There are different types of connectors, and you can add labels and links to them if you want.

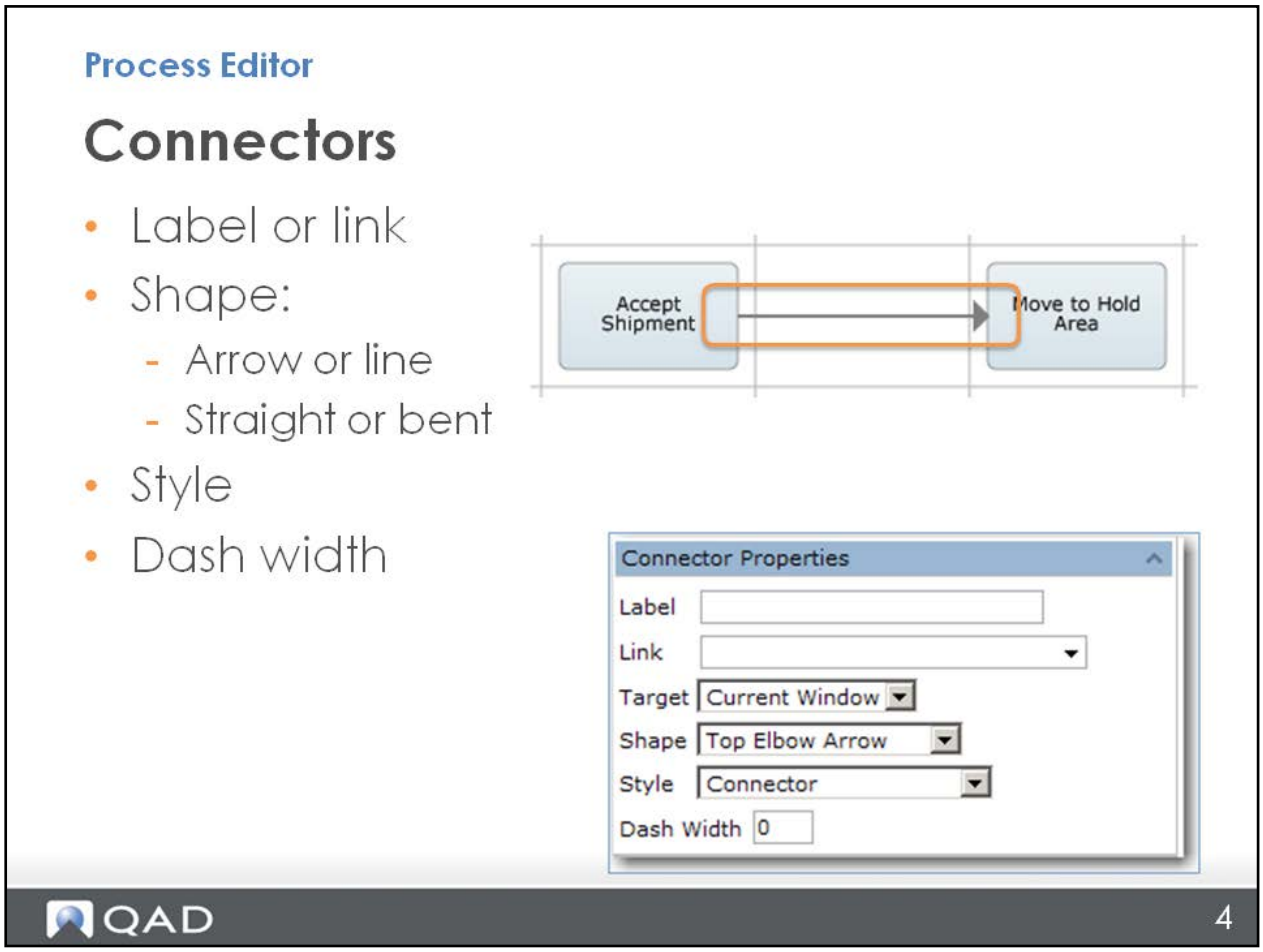
In addition to these basics, this section also covers how to design connectors that go from one node to several possible paths.

Connectors



Earlier, you saw briefly how to create them: Click one node, hold down the Shift key, and then click the next node.

Connectors



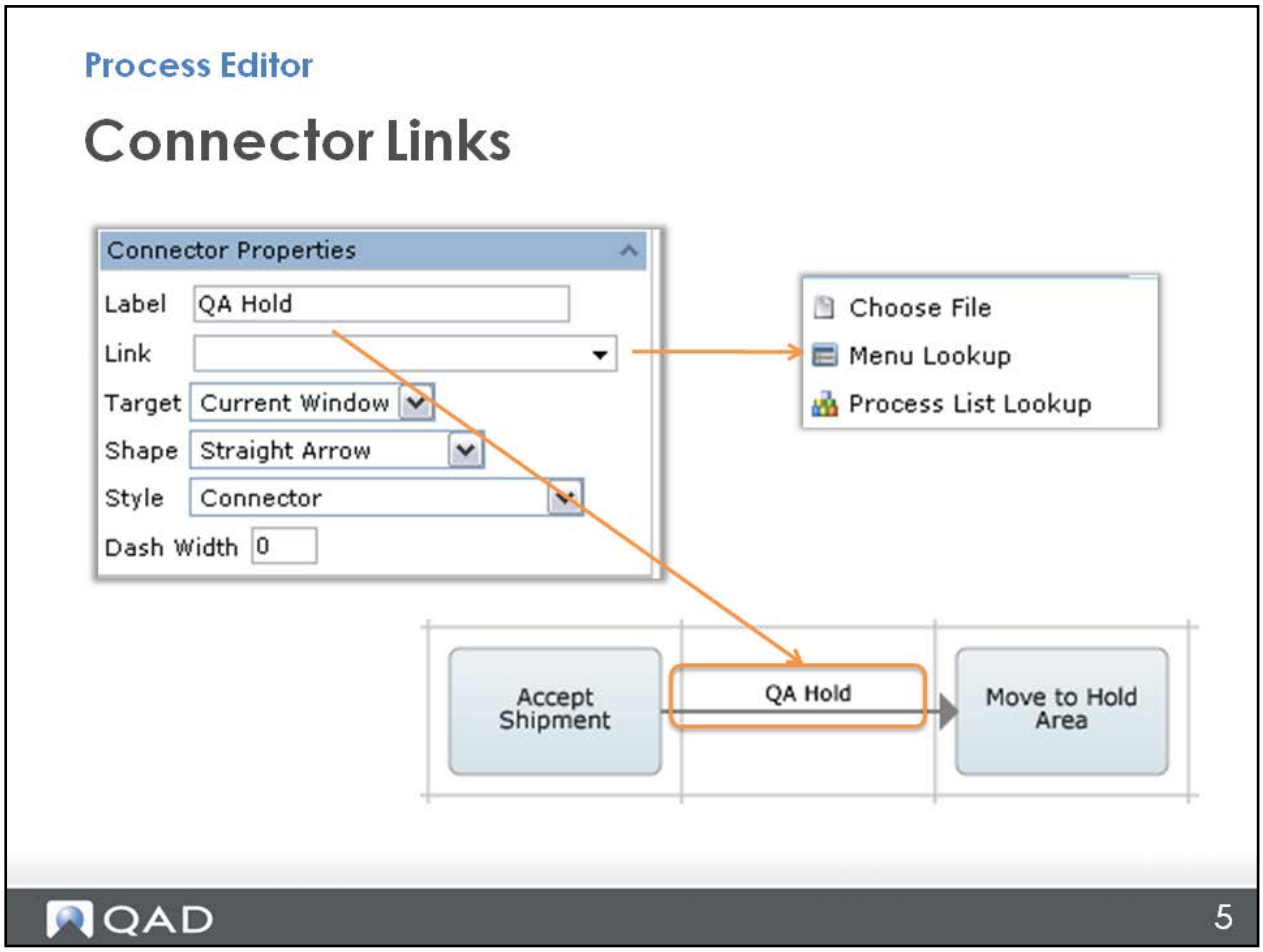
When you click a connector, the Connector Properties menu opens to let you:

- Add text to label the connector
- Link from it to something else (and have it open in the current window or a new one)

You can also determine the shape of the connector: do you just want it to be a line? Or do you want it to be an arrow? Is it going to go straight from one node to the next, or will it have a bend?

You also determine the connector style and the dash width – if you want the border of the connector to be a solid or a dashed line.

Connector Links

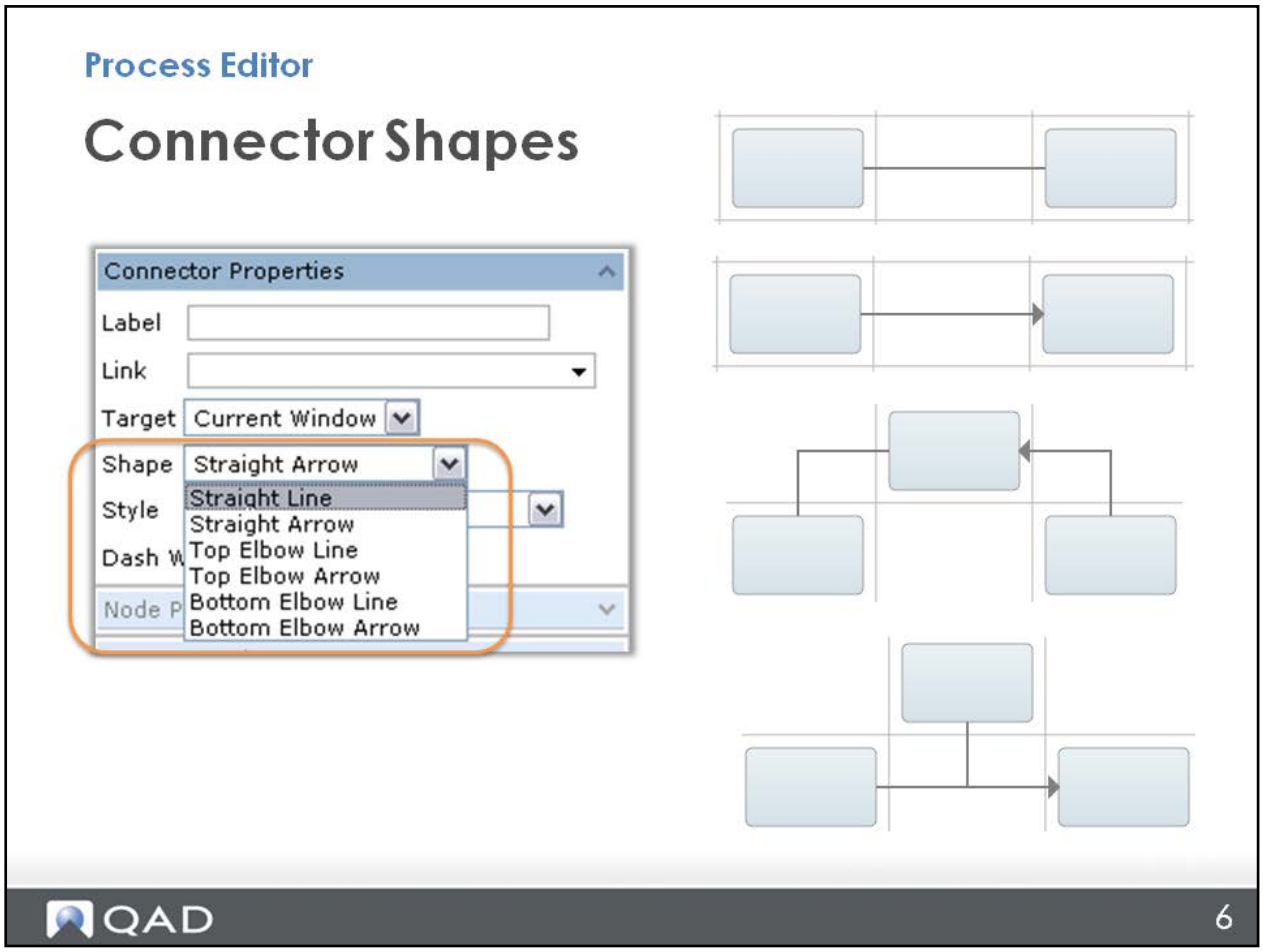


To add text to a connector, type the text in the Label field.*

You can add a link to a connector so you go from there to something else, such as a file on your computer, a QAD program from a menu, or another process map, although this kind of operation is not very common.

*Note : If you are unable to enter a label on a connector (for example, due to a Java script error), try this workaround: Type your text into another field, then cut and paste it into the Label field.

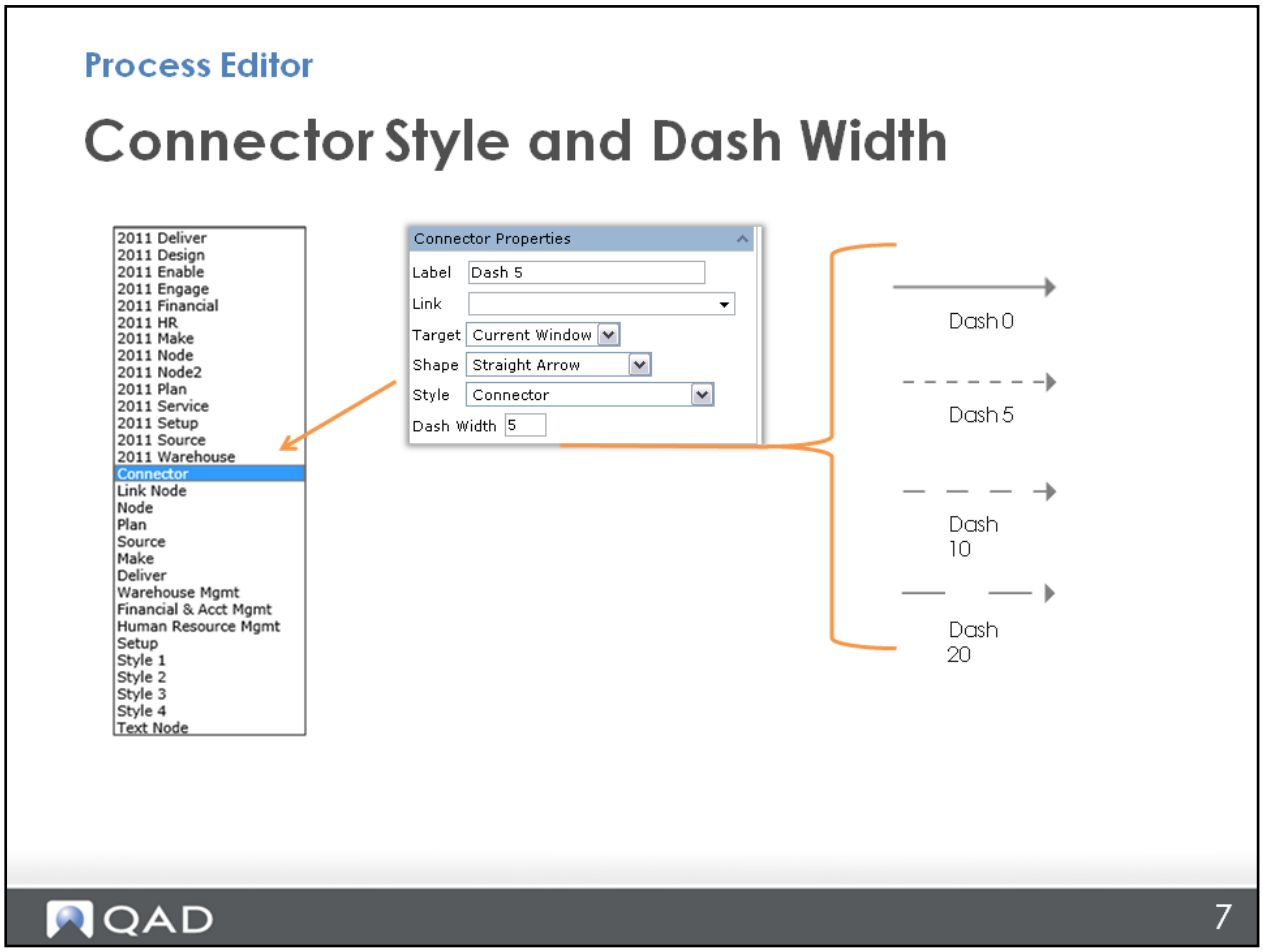
Connector Shapes



The various shapes available for a connector are:

- Straight line and arrow
- Top elbow line and arrow
- Bottom elbow line and arrow

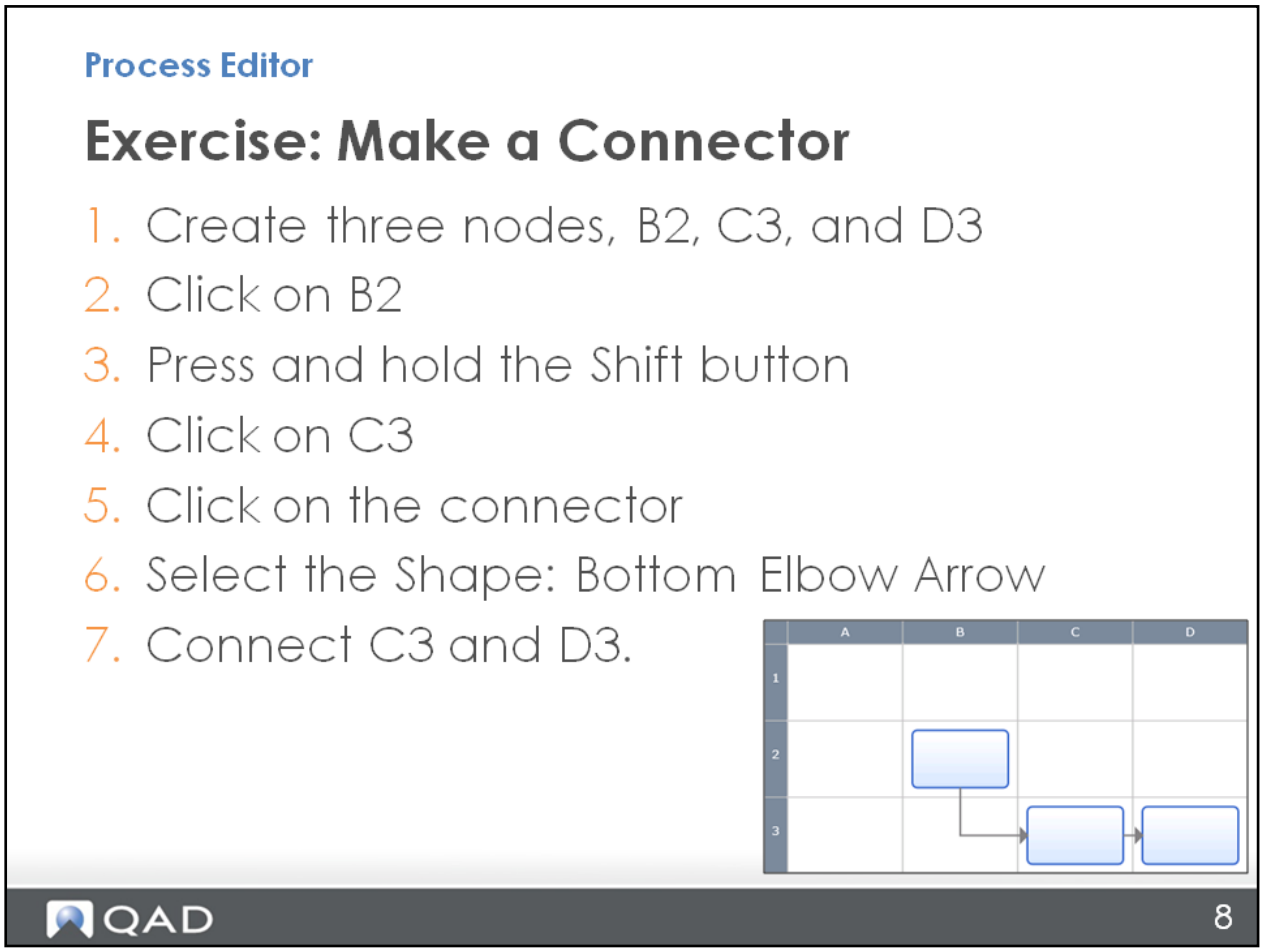
Connector Style and Dash Width



Similar to nodes, you can change the style of the connector to modify the look of the map; for example, to make it match the color of the node style.

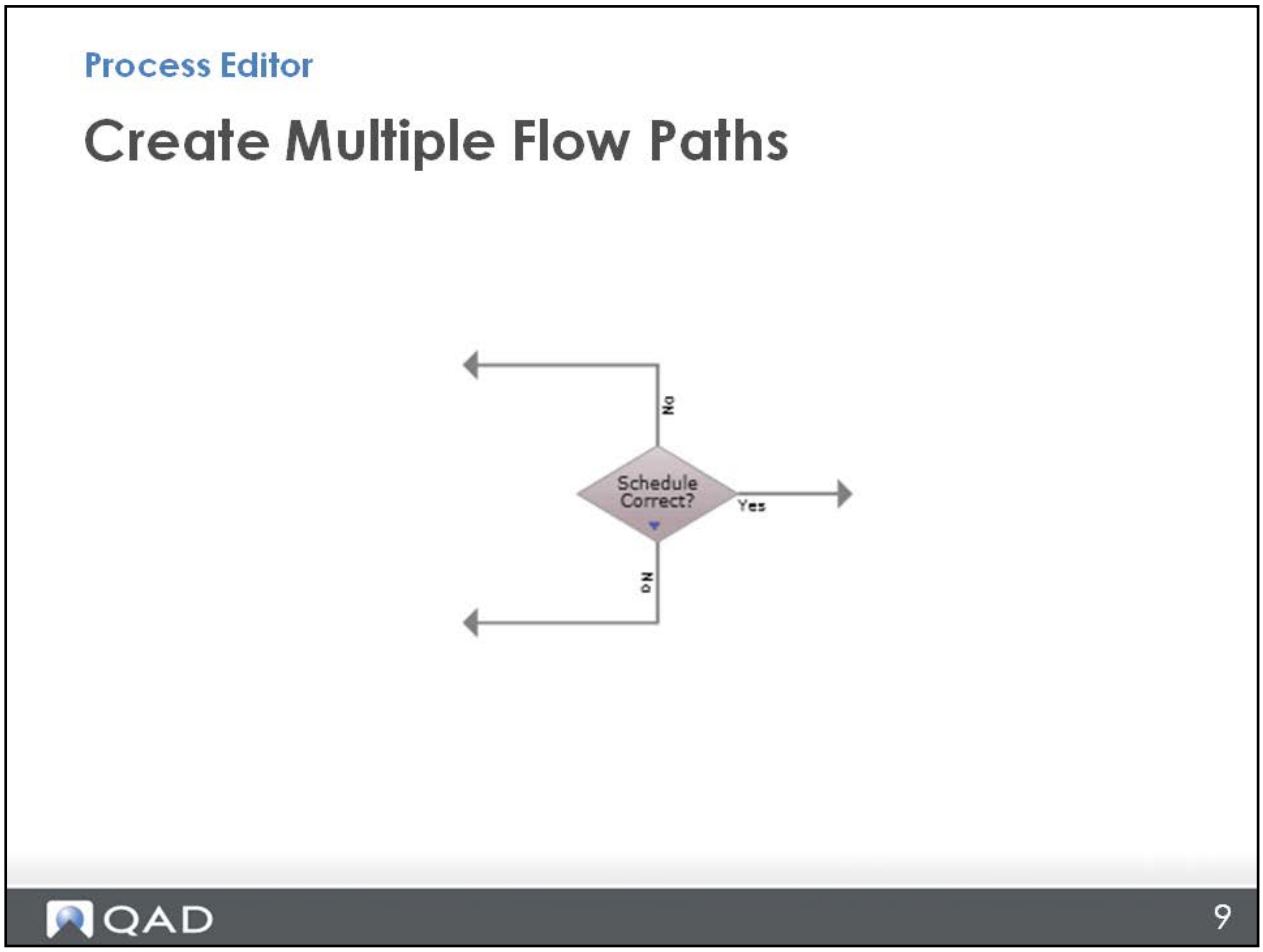
You can also change the dash width of the connector to make a dashed line instead of solid, although this is not very common.

Exercise: Make a Connector



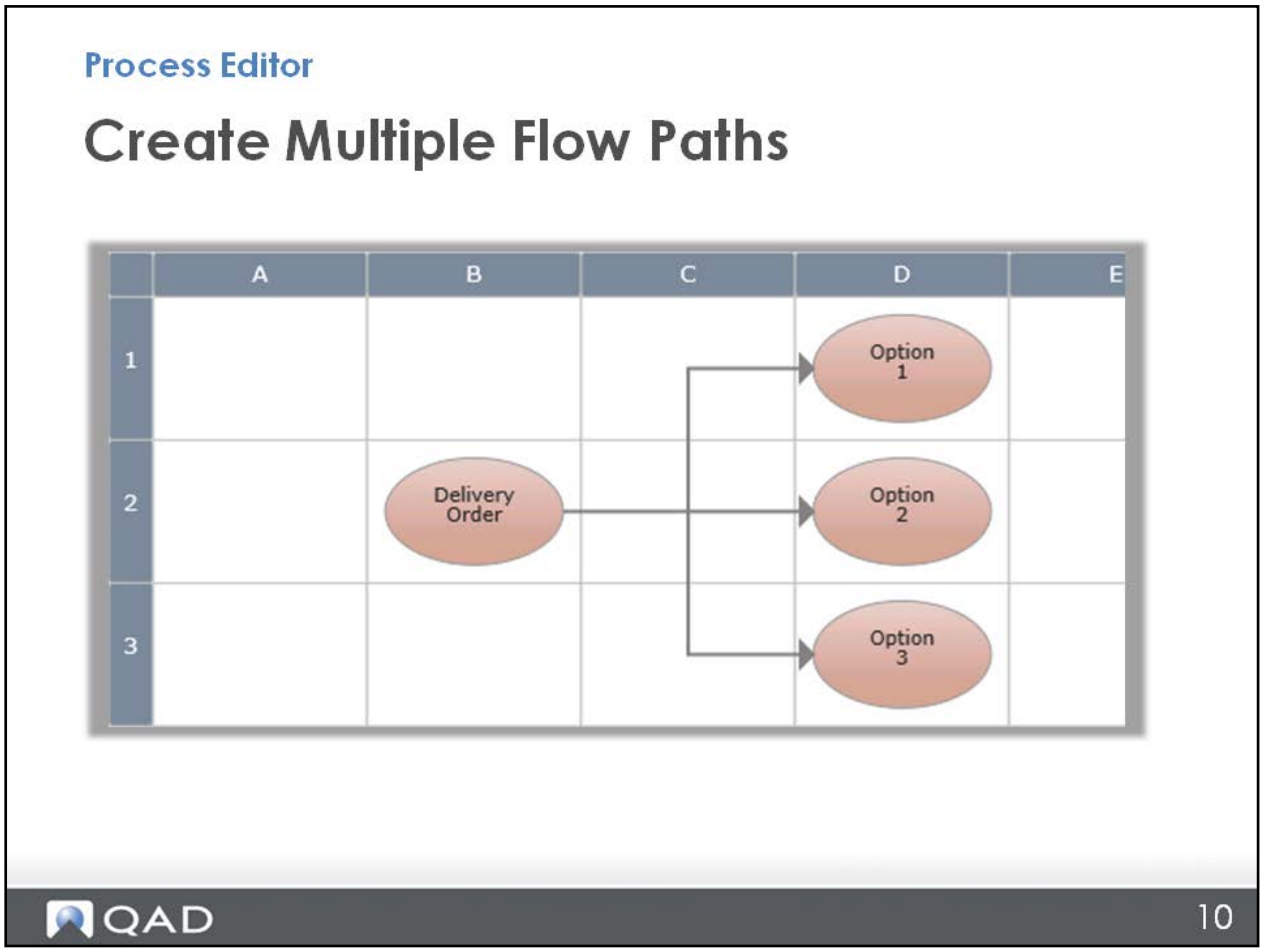
Do this exercise to practice making connectors.

Create Multiple Flow Paths



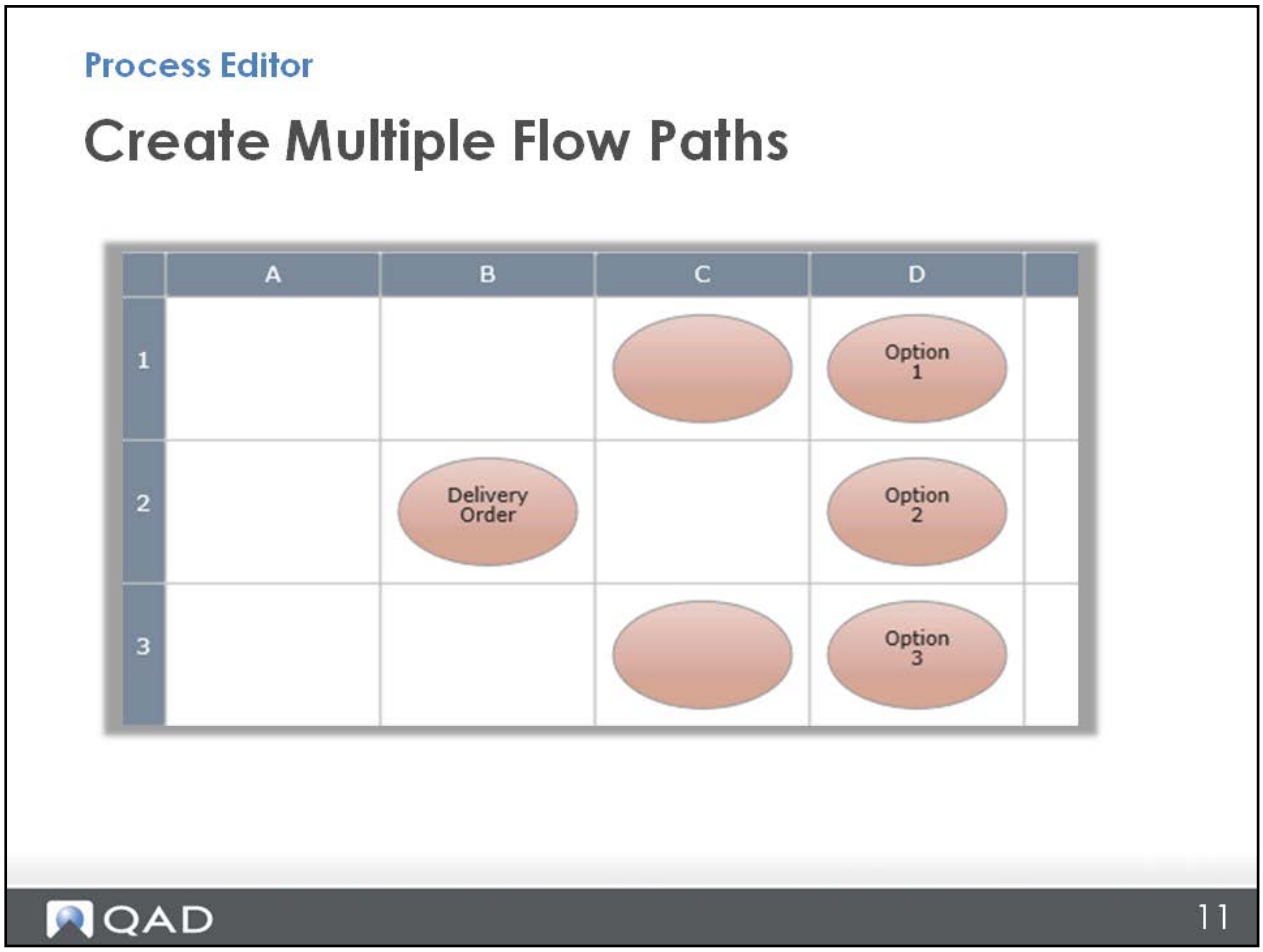
In many process maps, it is common to have multiple flow paths. Often, you use a diamond shape node to connect to different options.

Create Multiple Flow Paths



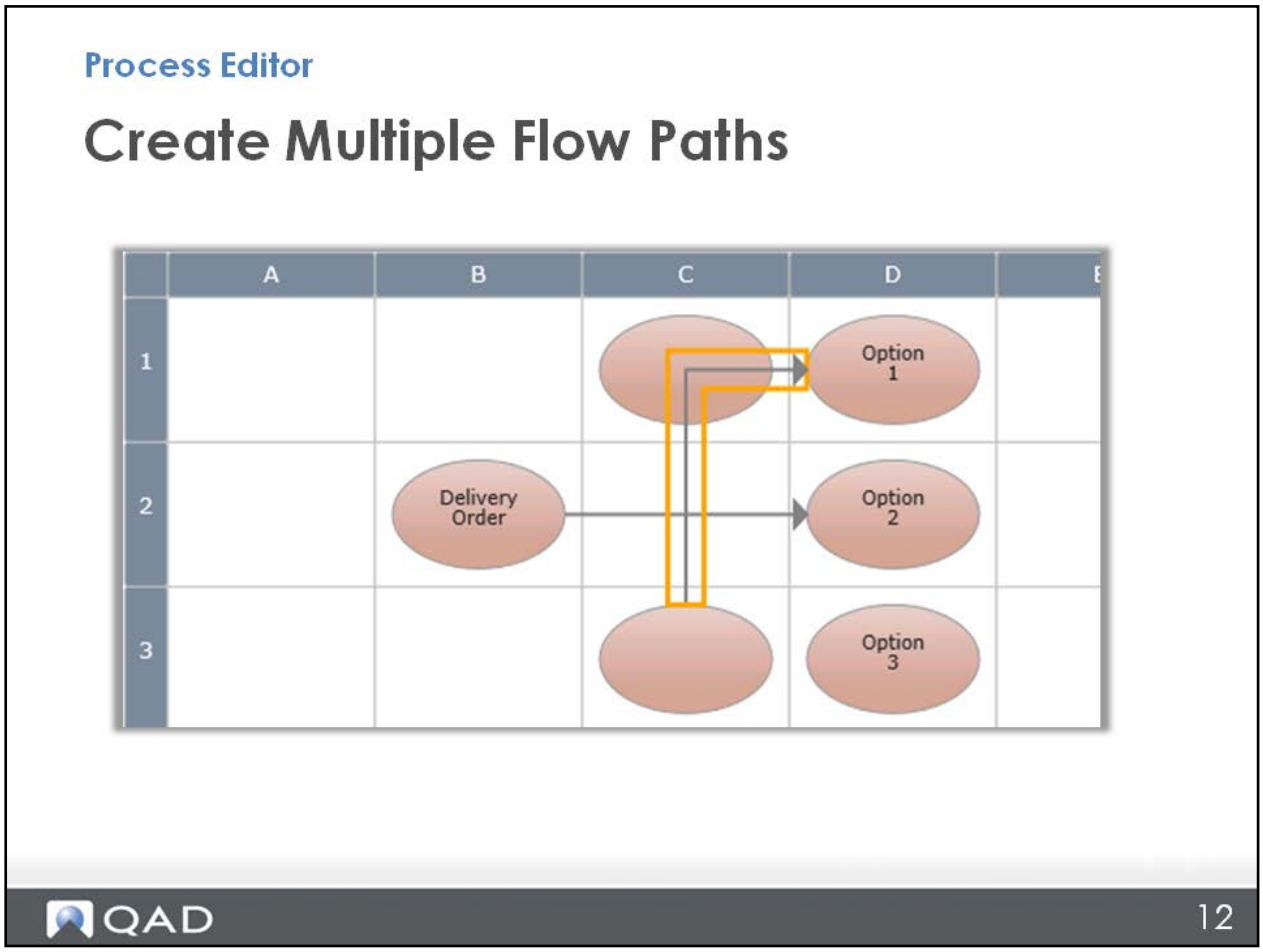
The other way to do it is to create multiple paths for the user to follow, like this, but the challenge is getting the connectors to line up correctly since the Process Editor offers only straight or elbow connectors and they have to connect to a node – not to another connector.

Create Multiple Flow Paths



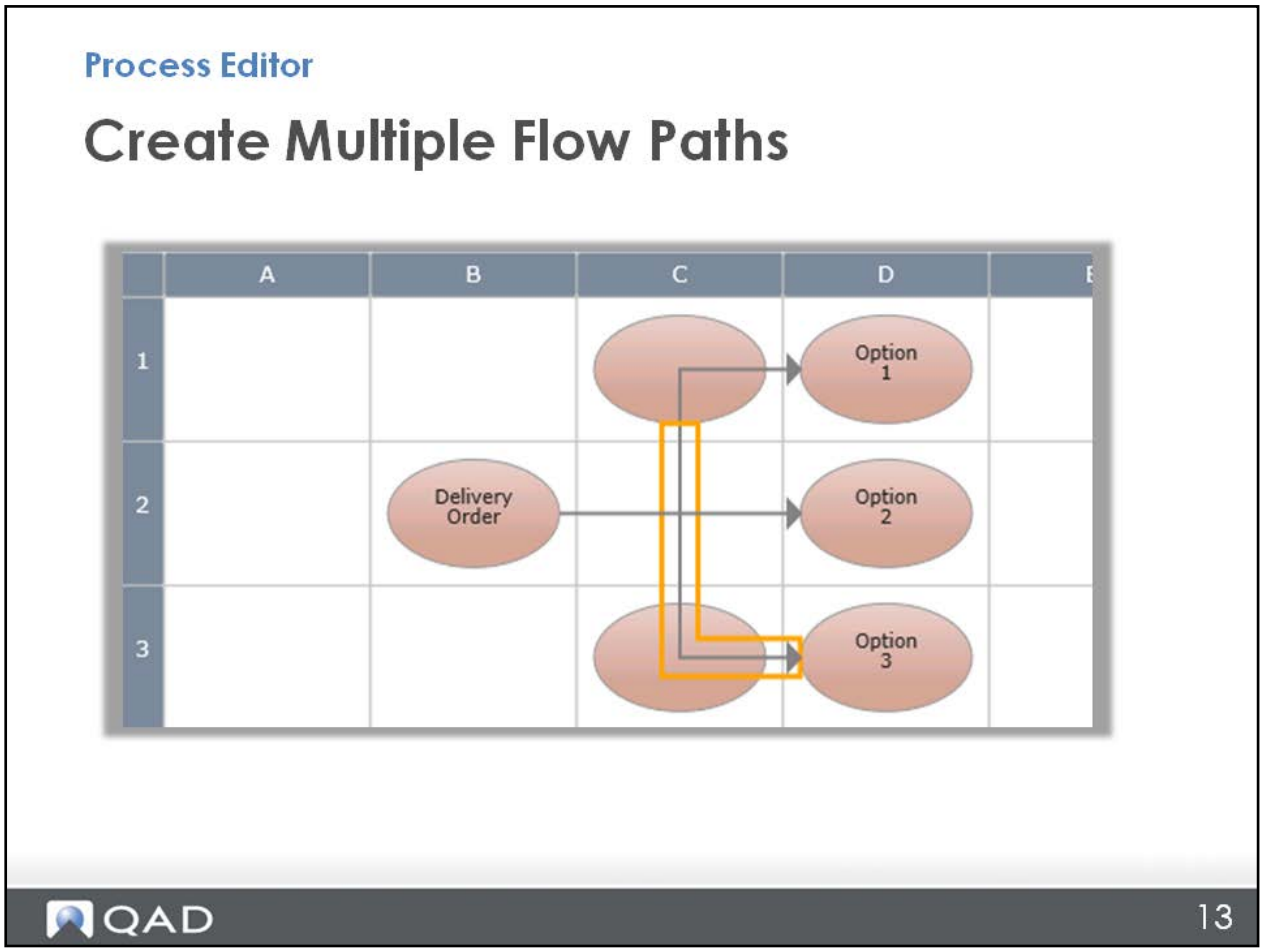
Basically, you have to create some additional nodes.

Create Multiple Flow Paths

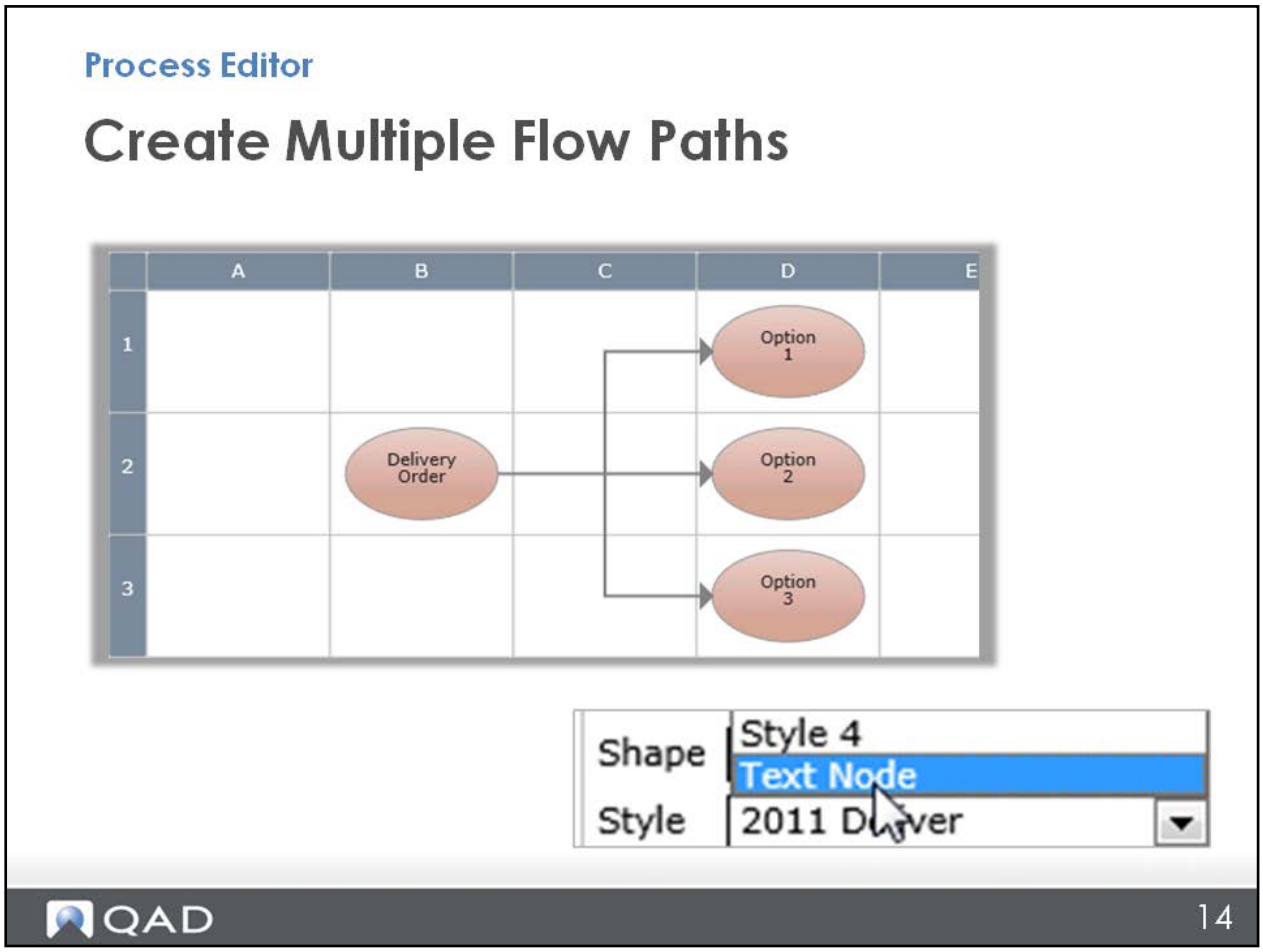


Then, use them only to connect other nodes.

Create Multiple Flow Paths

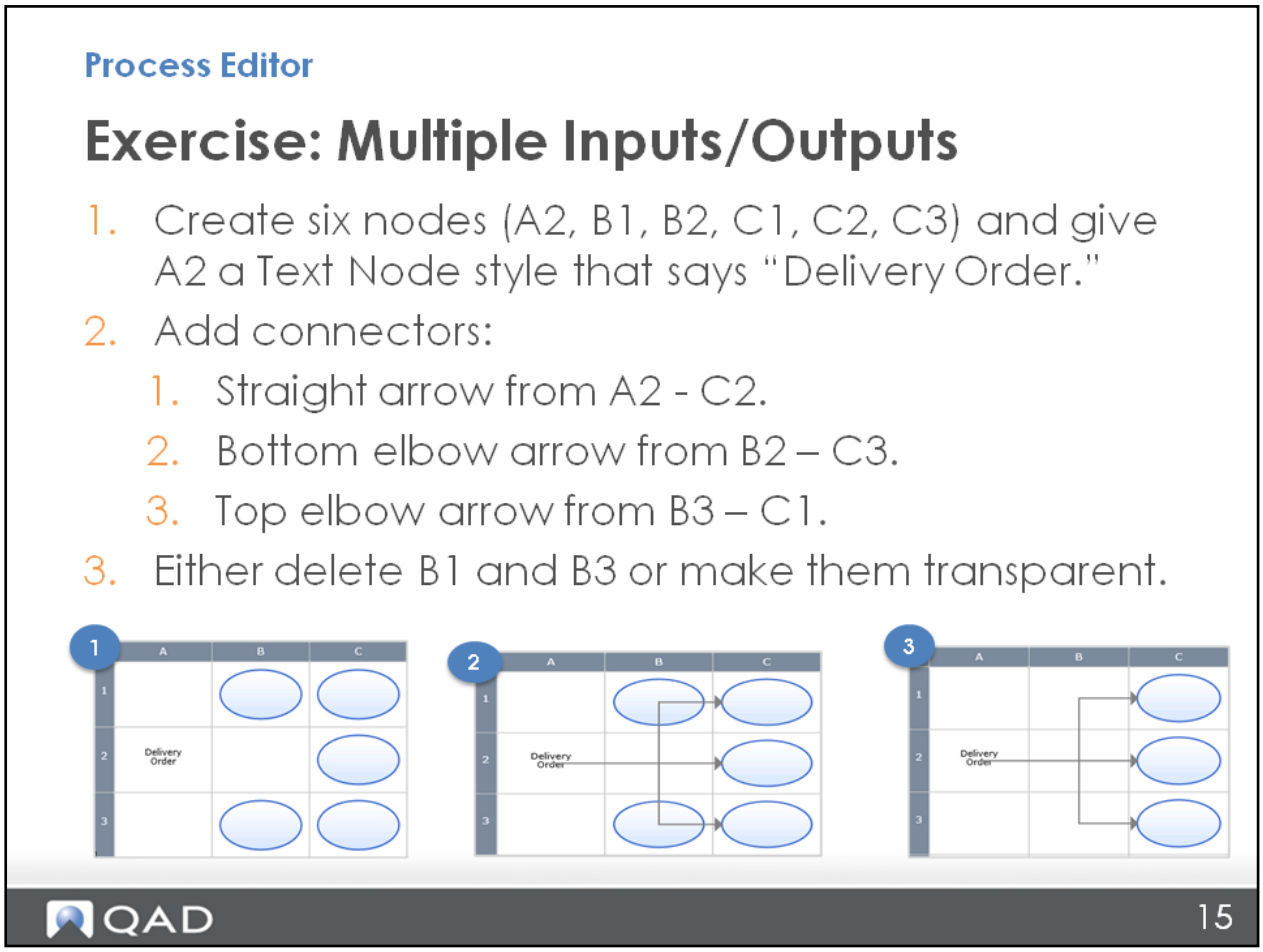


Create Multiple Flow Paths



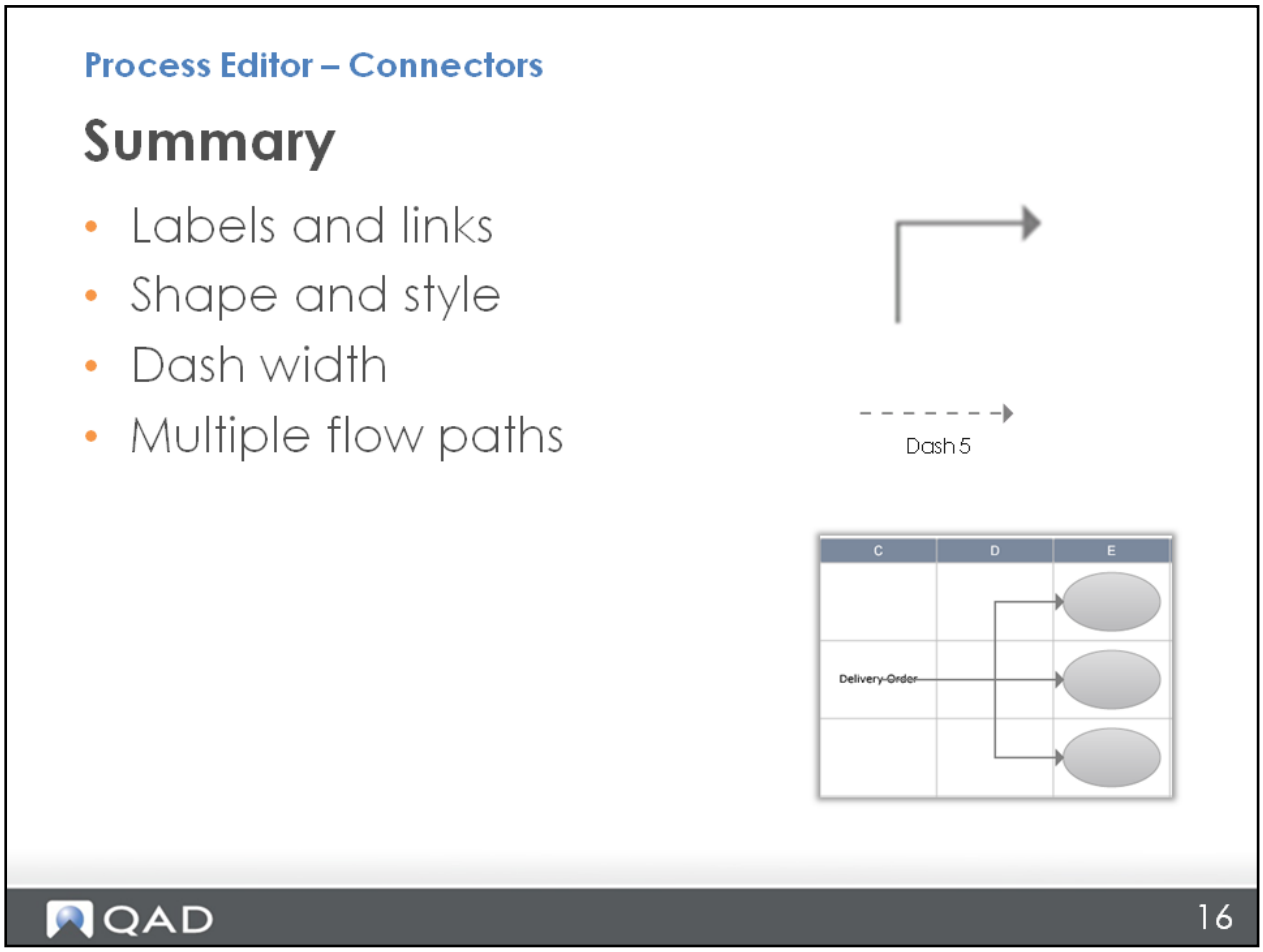
You can then delete them (or make them transparent) and still leave the connectors showing. To delete a node, you simply click on it and hit the Delete key. To make a node transparent, you make it a Text Node style and do not enter any text. It just becomes a transparent node that you can connect to.

Exercise: Multiple Inputs/Outputs



Do this exercise to practice creating multiple flow paths.

Summary



In this section, you have seen how you can name connectors with a label and link from them to something else. There are different shapes (a line or an arrow) and styles (straight or elbow) and borders (solid or dashed line).

You also saw some creative ways to design multi-flow paths.

CHAPTER 5

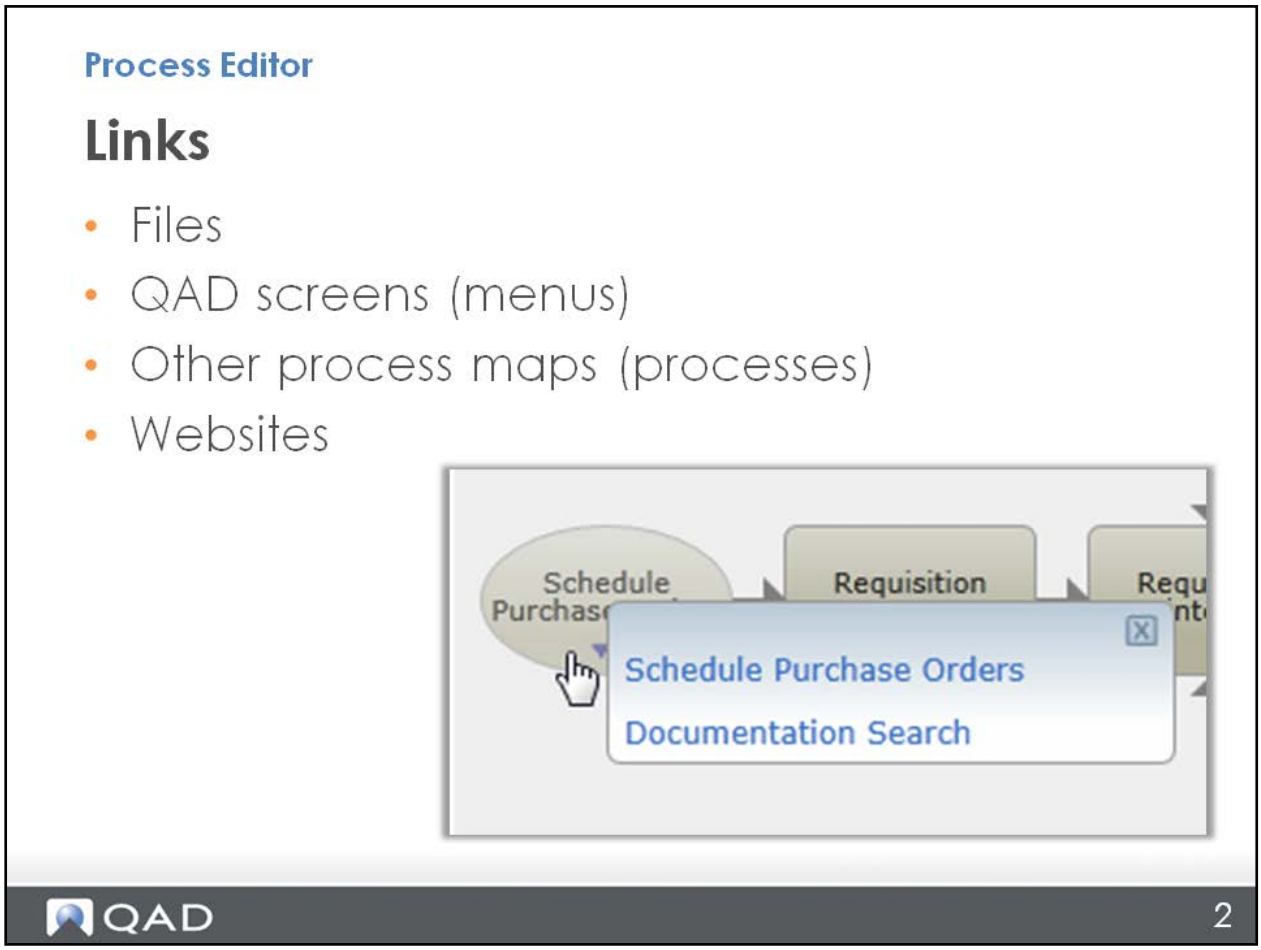
Linking

In this section, you will learn how to create links from the process map nodes to all kinds of supporting resources for the process.

To watch a video of this section, go to the Learning Center (http://learning.qad.com) and use the Smart Search tab to search the key words “Process Editor.” Take the fifth section (5 of 9) called “Linking,” Course # OLT-006870.

Or, if you are already logged into the Learning Center, just click here:
https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?selectTab=OLT+Activities

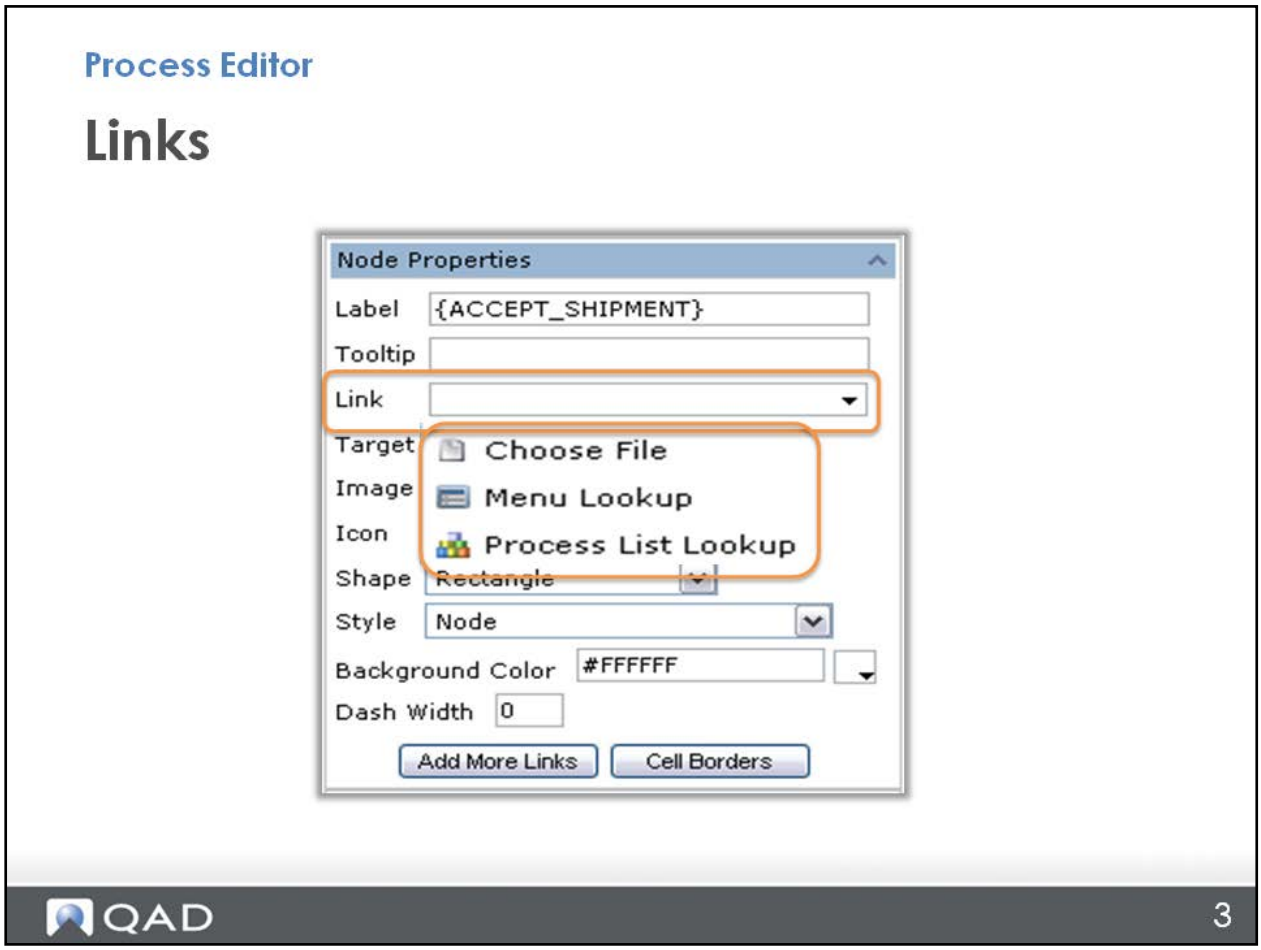
Links



The nodes in standard QAD process maps are generally already linked to the other processes, QAD menus, or the QAD Document Library where you can find supporting documentation, such as training guides. This linking started with Enterprise Edition release 2011.1, but, if you have an older QAD version or if you are creating a new map, you may want to add these and other kinds of links, as demonstrated in this section.

Overall, you can have up to eight links per node, so you can add more links to go to training documentation, videos, sites in your company's Intranet external web sites, or even another process map that you create and customize.

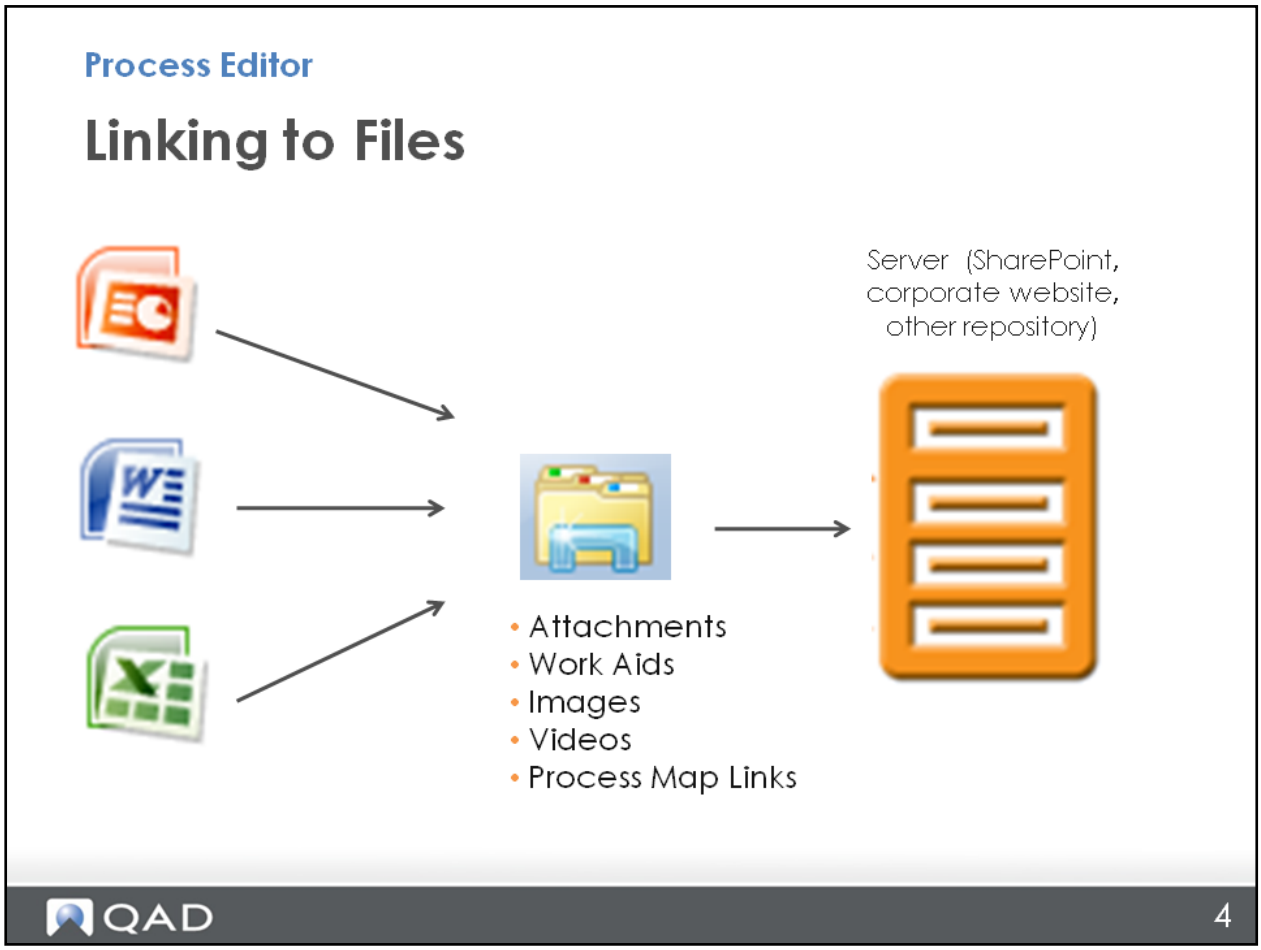
Links



In the Process Editor Node Properties, you can see the options to link to a file, a QAD program or screen (looking it up in a menu), or another process map (looking it up on a list).

First, link to a file. This could be some training documentation you already have on your system; maybe a work instruction, a list of contact people, a training guide, a page from a training guide, or even a video you have created to show the process. A demo in an earlier section of this training shows how to link to a file using the Choose File option.

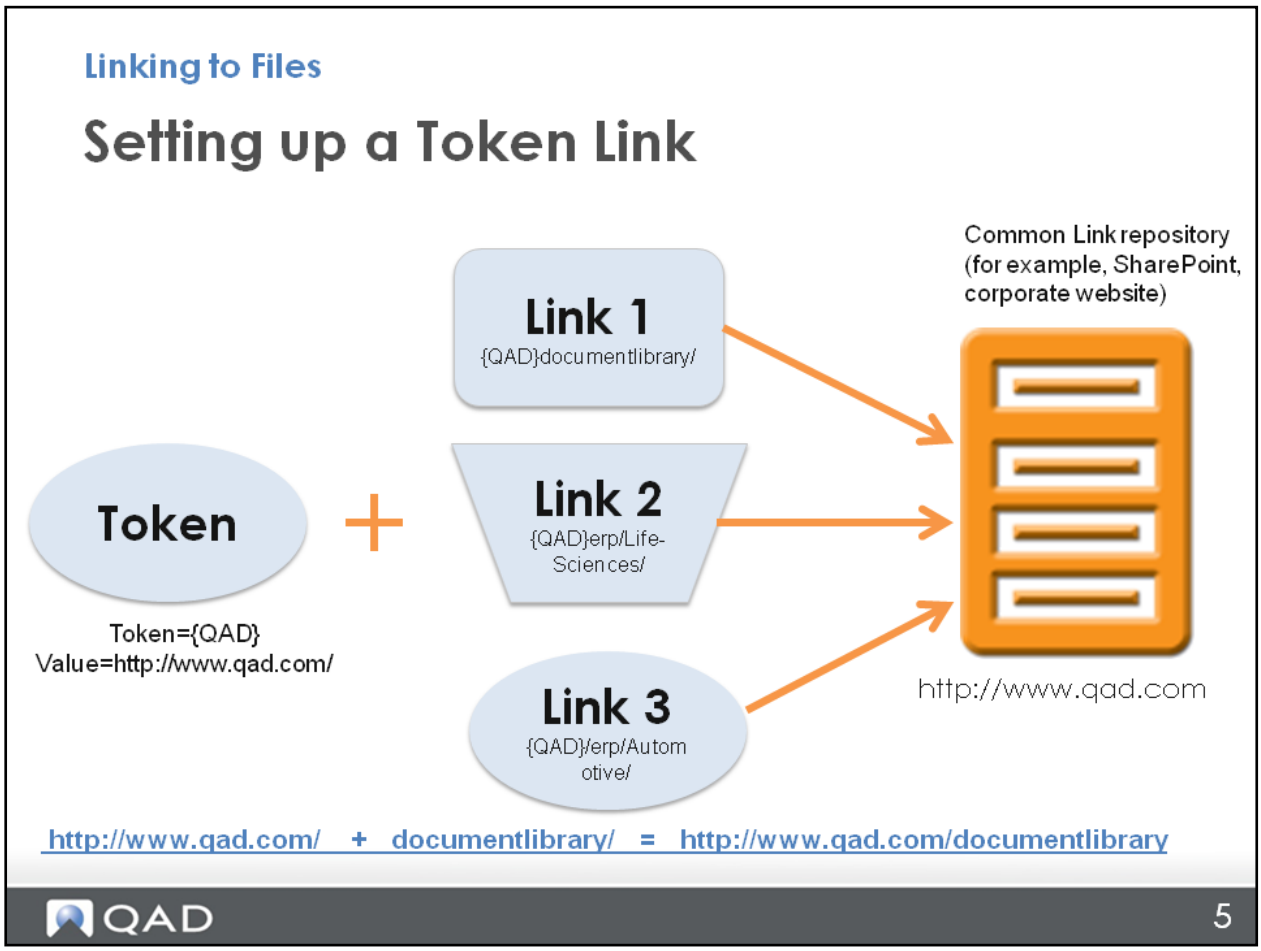
Linking to Files



A very important thing about linking to a file is that it cannot just be any file you have on your own computer; linked files must be in a designated place on a server that is accessible to QAD Enterprise Applications. This could be a company server, website, Sharepoint, Google Drive, or something similar.

Create a folder on the server where you can store the files you will want to link to process maps. You might make a folder for “Attachments” or “Work Aids;” maybe one for “Images,” “Videos” or simply one for “Process Map Links.”

Setting up a Token Link



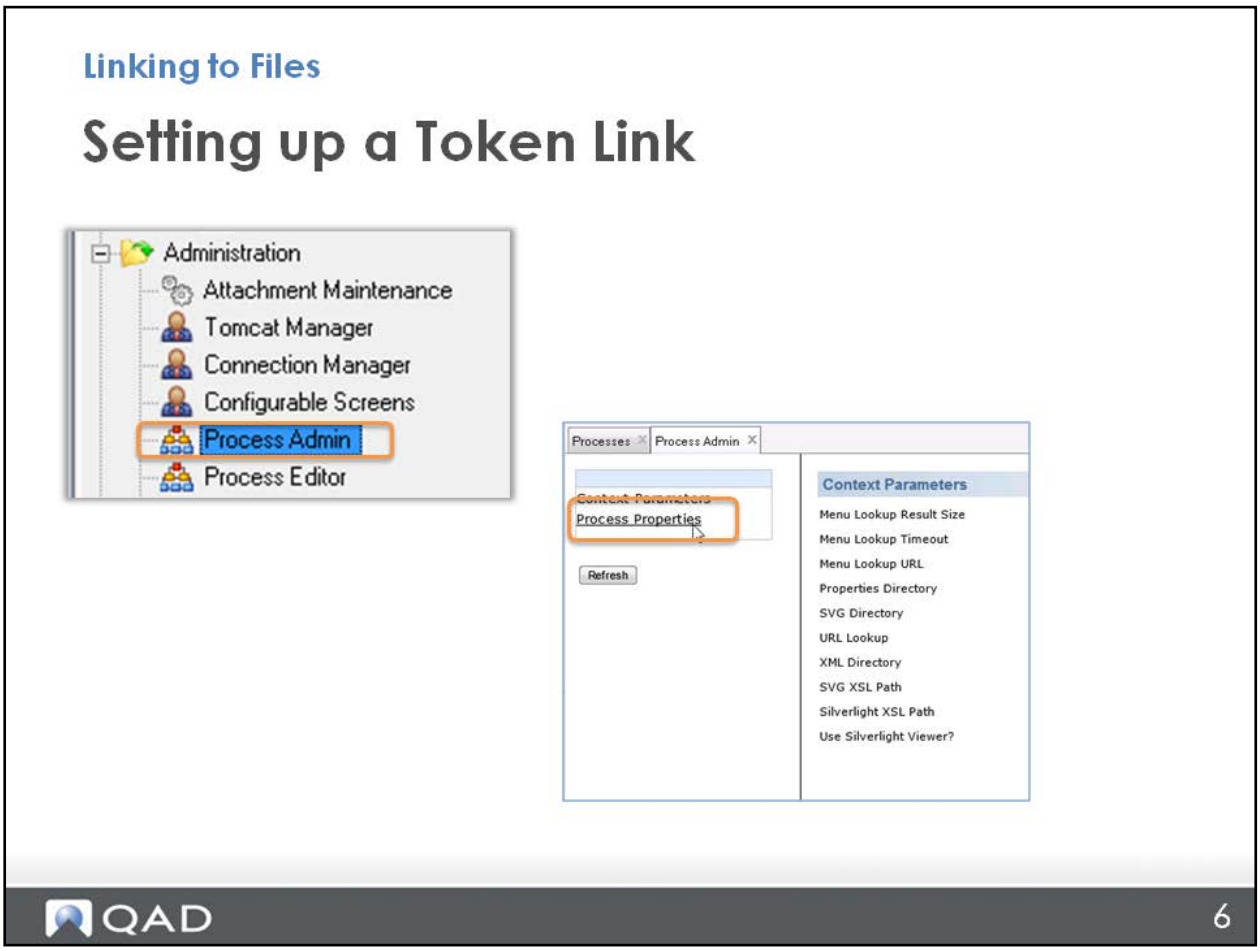
Next, you create a “token” link to the server so you no longer have to type in the server address each time you want to link to something. Instead, you can simply type in the token and the file name. This provides a nice shortcut for you, but it is also important for another reason.

If the server is ever replaced or the file structure changed, you only have to change this one token link to have everything else redirected. Without this token, if the server changes, you have to update every link you have created on all the separate nodes.

For example, consider the server for www.qad.com. That is the location of the files to link to for the Document Library and the pages for Life Sciences and Automotive. The upcoming demo shows you how to create the token link for qad.com and then to make links on some nodes in the Document Library, and the other pages, beginning with the token.

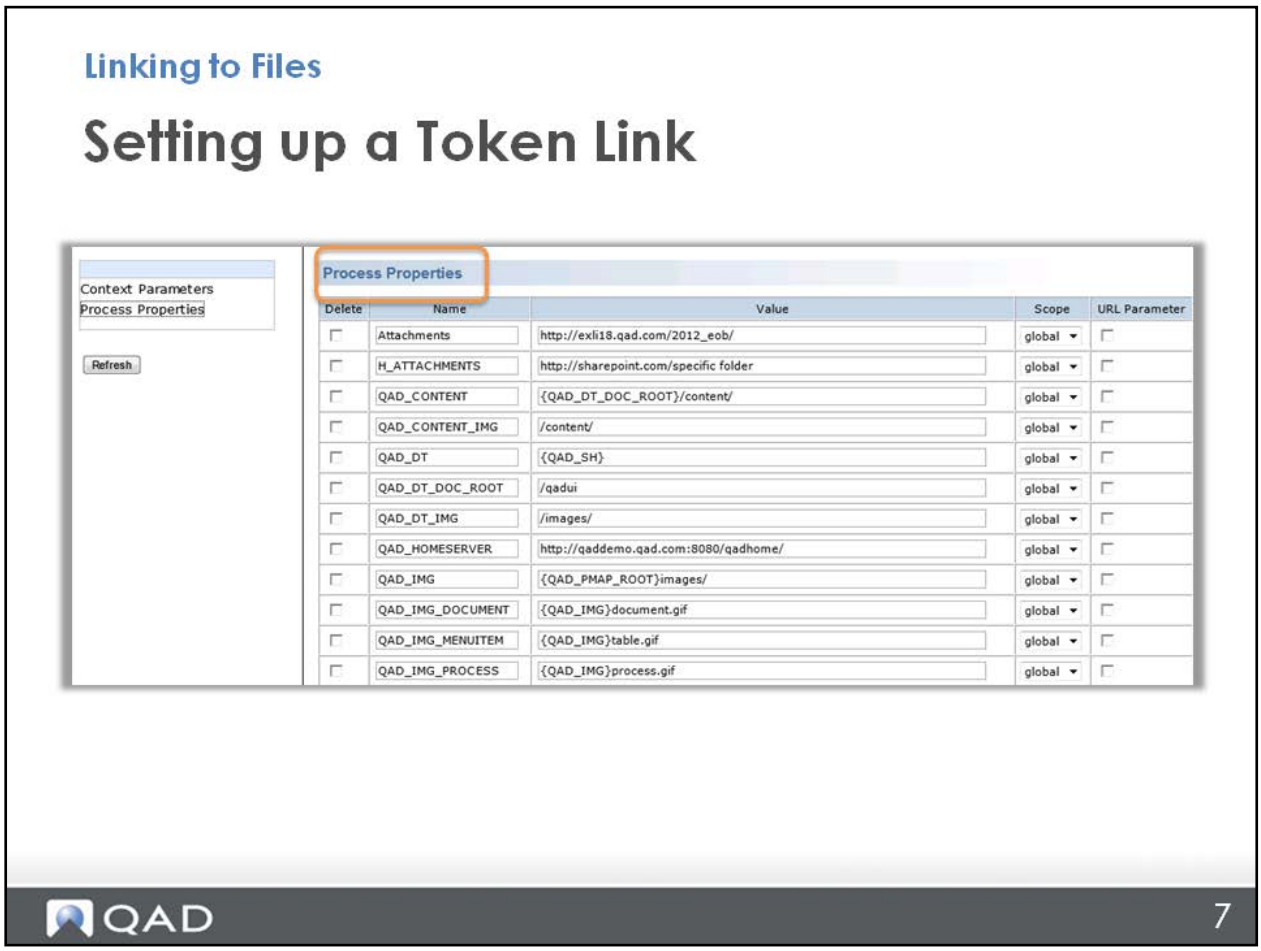
If that server is replaced (for example, with http://www.qad2.com/), or if the file structure changes (for example, to http://www.qad.com/erp/processmaplinks), only the token has to be adjusted and all the filenames within the links will still be valid.

Setting up a Token Link

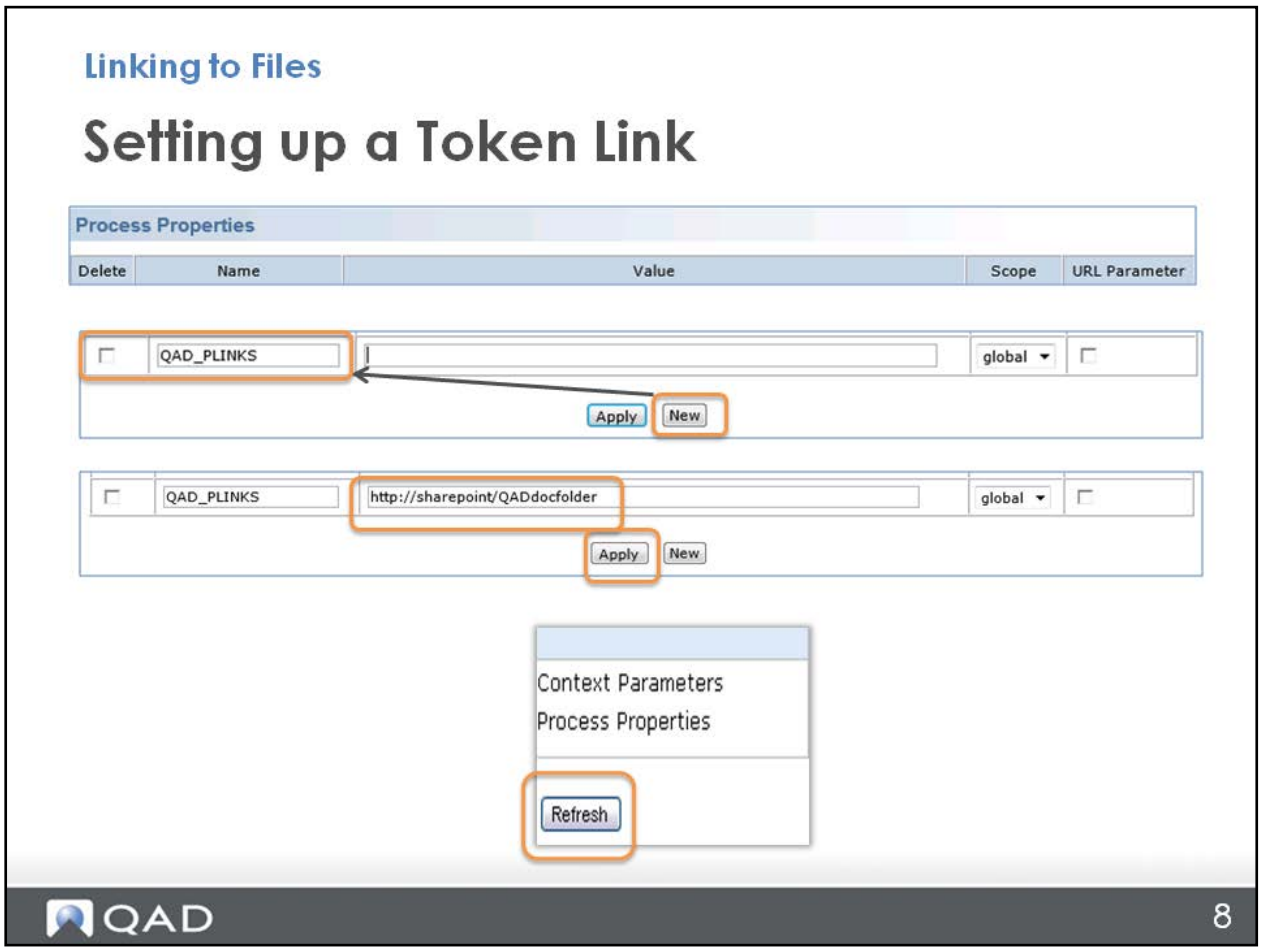


To set up the token, go to Process Admin, which is in the same Administration menu as the Process Editor. Then, open Process Properties.

Setting up a Token Link



Setting up a Token Link



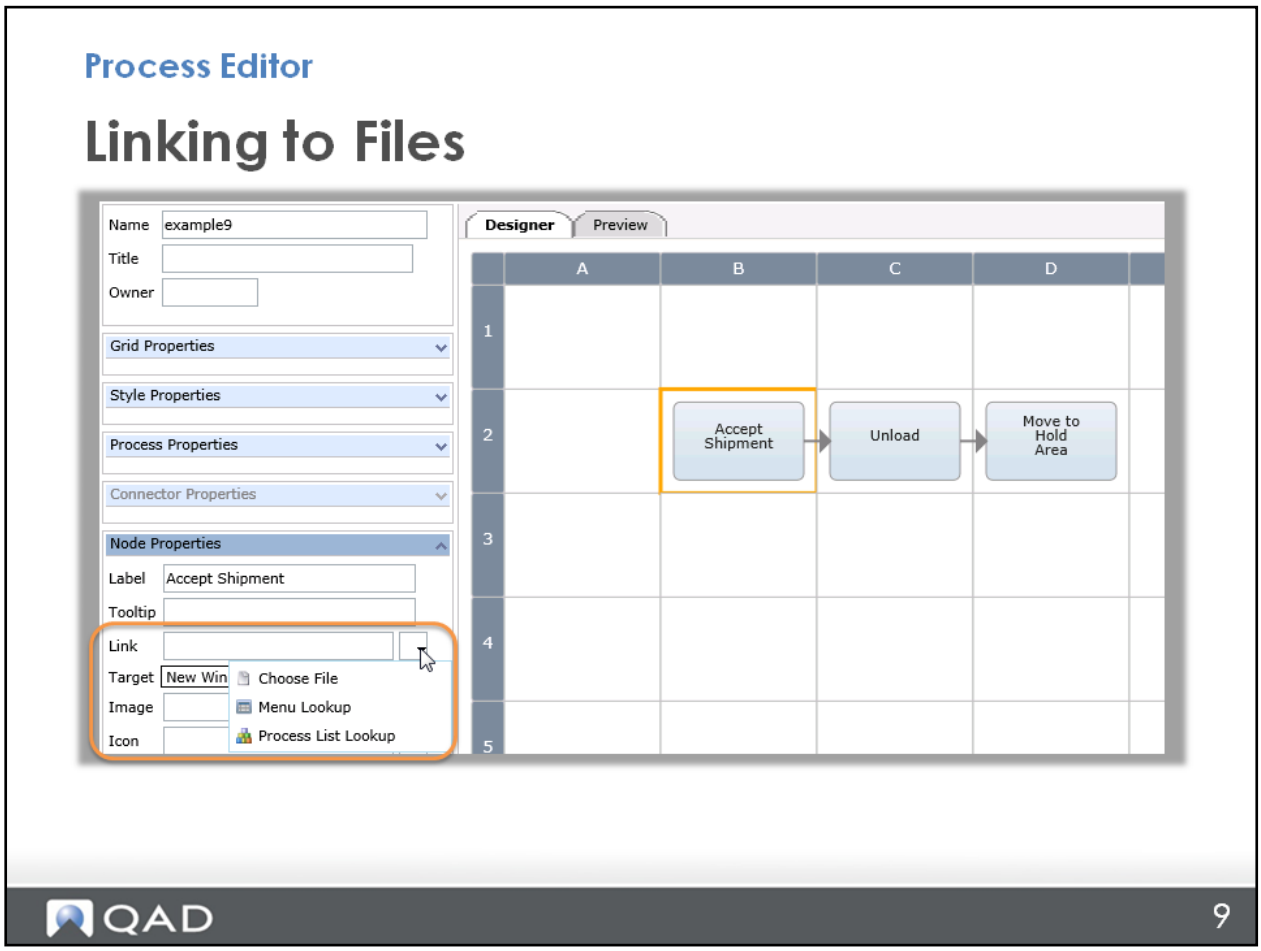
Look at the bottom of the Process Properties screen and click New. A blank line opens at the bottom of the list.

You need to name the token. Keep the name short so that you can type it easily when creating links. For example, if you want to call it QAD Process Map Links, maybe shorten it to QAD_PLINKS; or shorten "Work Instructions" to WI. This is better than having to type long token names later. Additionally, shorter token names are much easier to remember. For token names, use all uppercase letters with underscore lines in place of spaces.

With the token named, type the name and location of your server (for example: http://sharepoint/QADdocfolder) and click Apply.

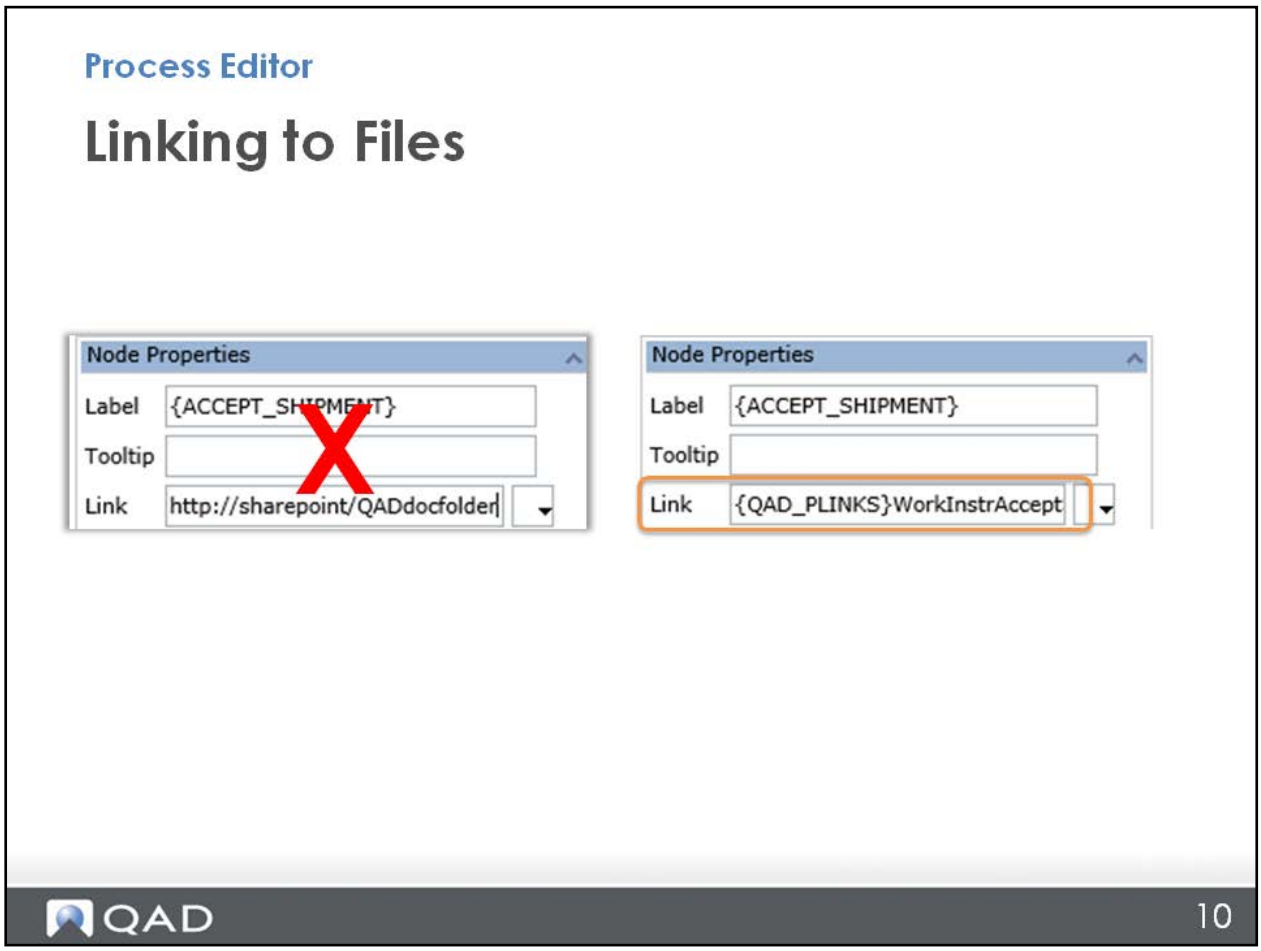
Finally, click Refresh to activate your new token.

Linking to Files



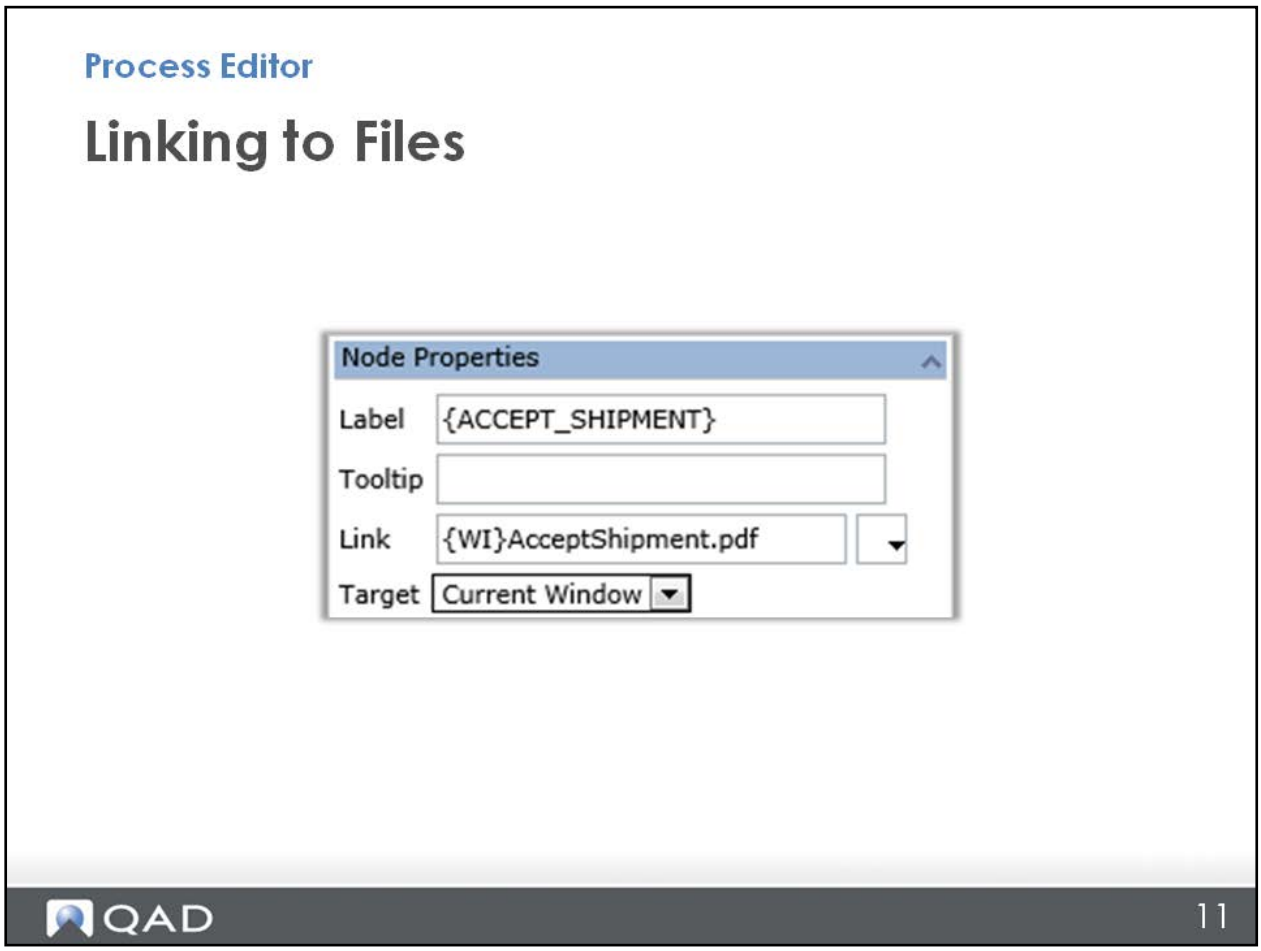
Now, back in the Process Editor, make a link from the first node.

Linking to Files



Rather than using the Choose File option under Links, type the token name and then specify the file. In this case, {QAD_PLINKS} represents the QAD Doc Folder on Sharepoint, and you want the Work Instruction for Accepting Shipments.

Linking to Files

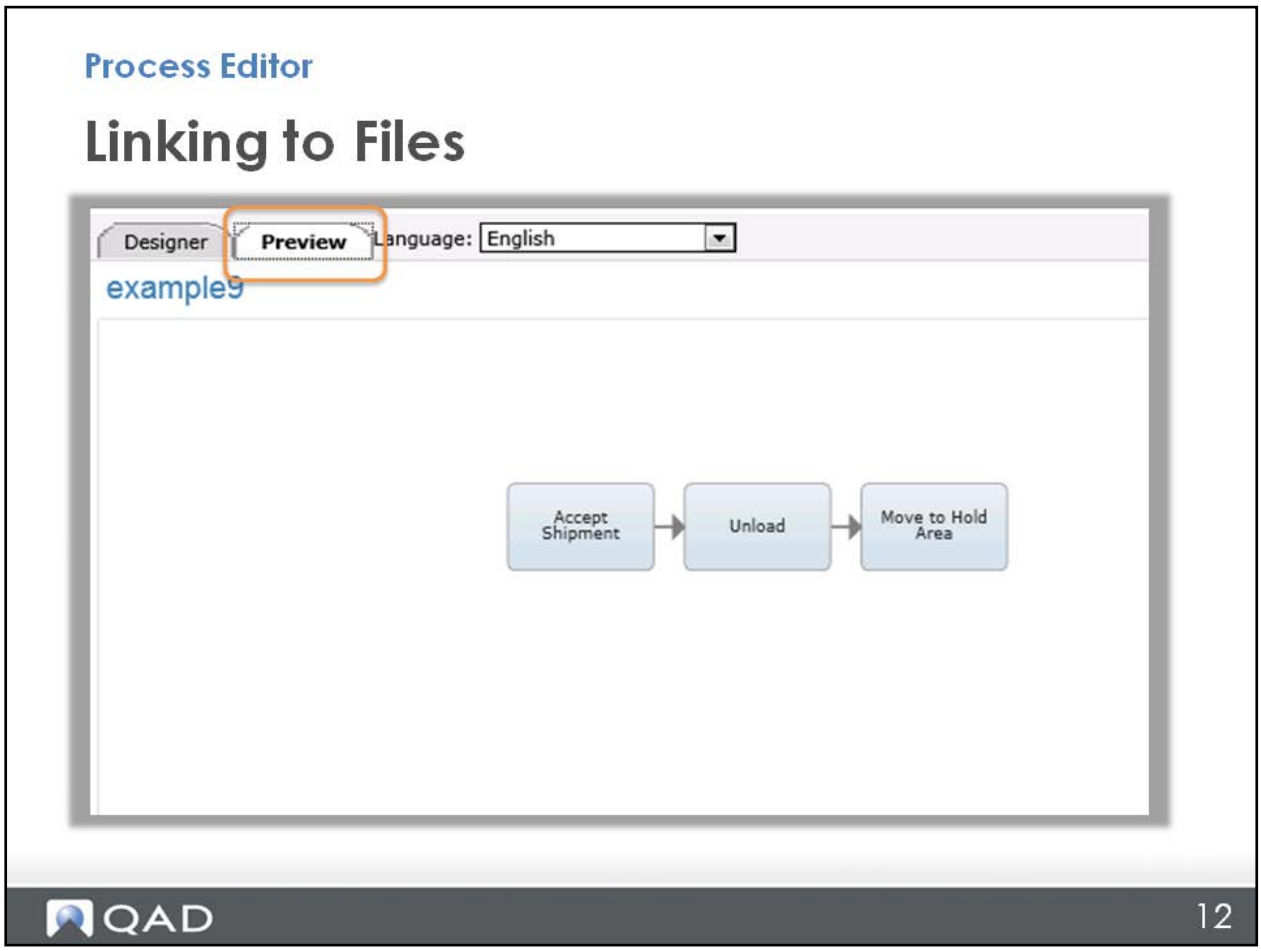


Likewise, if you have created a token called {WI} for where all your work instructions are stored, you would use a curly bracket and then type in WI, closed with a curly bracket, then enter the rest of the file name; for example, AcceptShipment.pdf.

Your next option is to define whether the file will open in the current window or in a new one. Note that whatever you choose in this first link defines the way the rest of the links open in this process map: either in the current window or a new one.

In this case, choose to have the link open in a separate, new window when it is selected.

Linking to Files

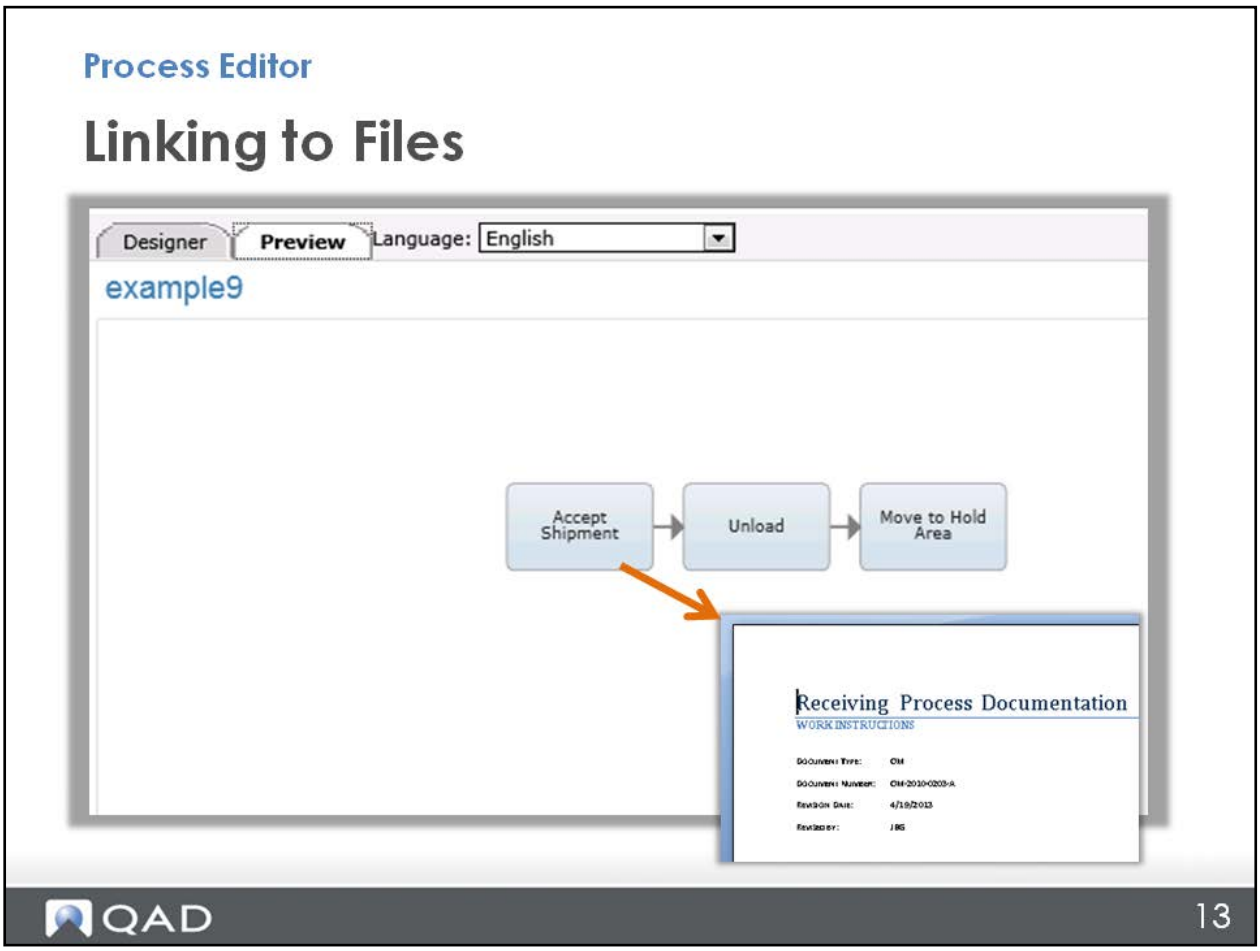


Before moving on, you should test your new link.

To do that, open the Preview tab at the top .

Important: Preview will only open if you have named your map. So even if you are not ready yet to give the map a formal name, just type something in so you can open the preview. You can go back and change it later.

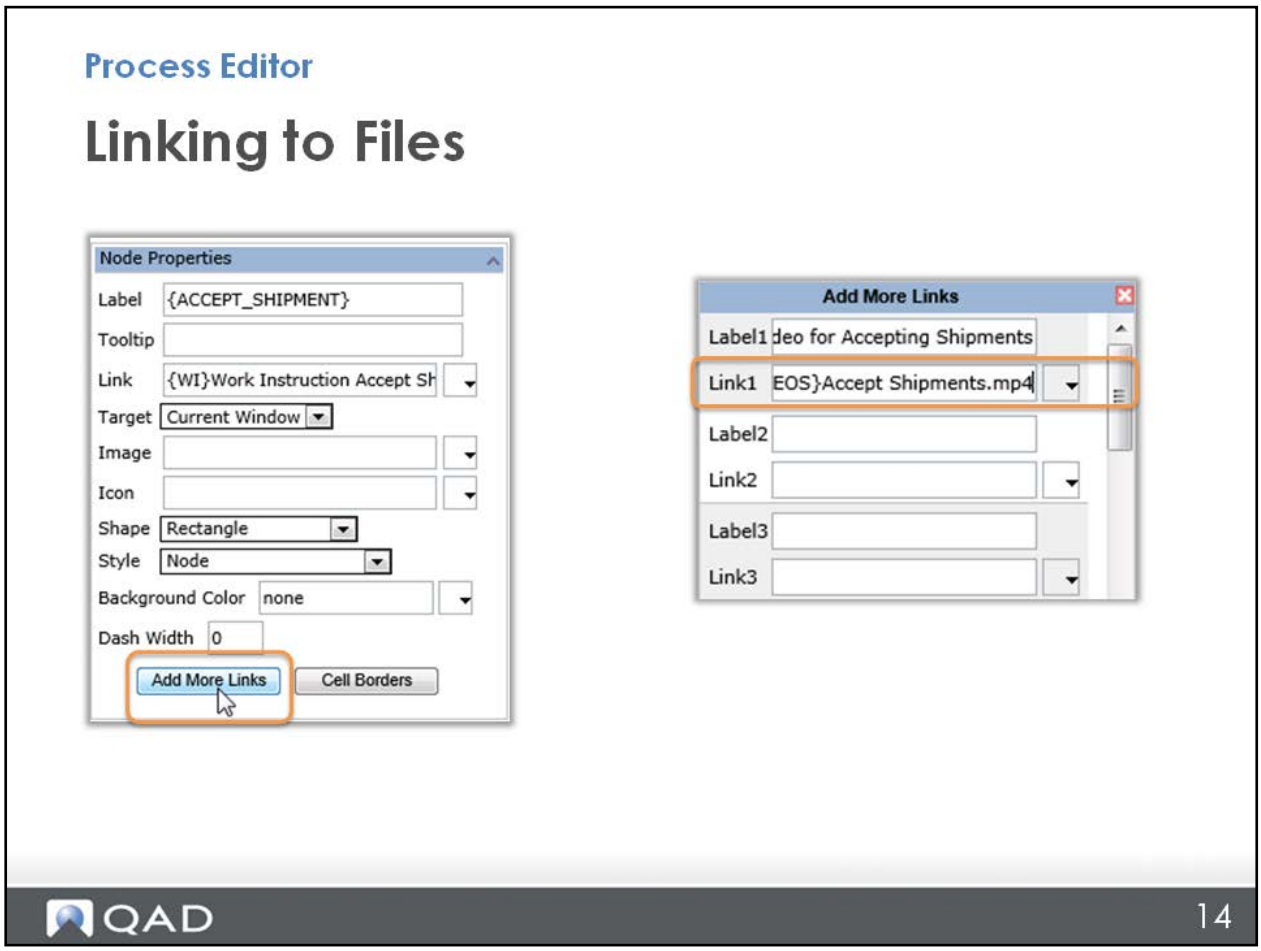
Linking to Files



Now when you click on the Accept Shipment node in Preview, your work instructions will open in a separate window.

Next, add another file, maybe a video you have made for this process.

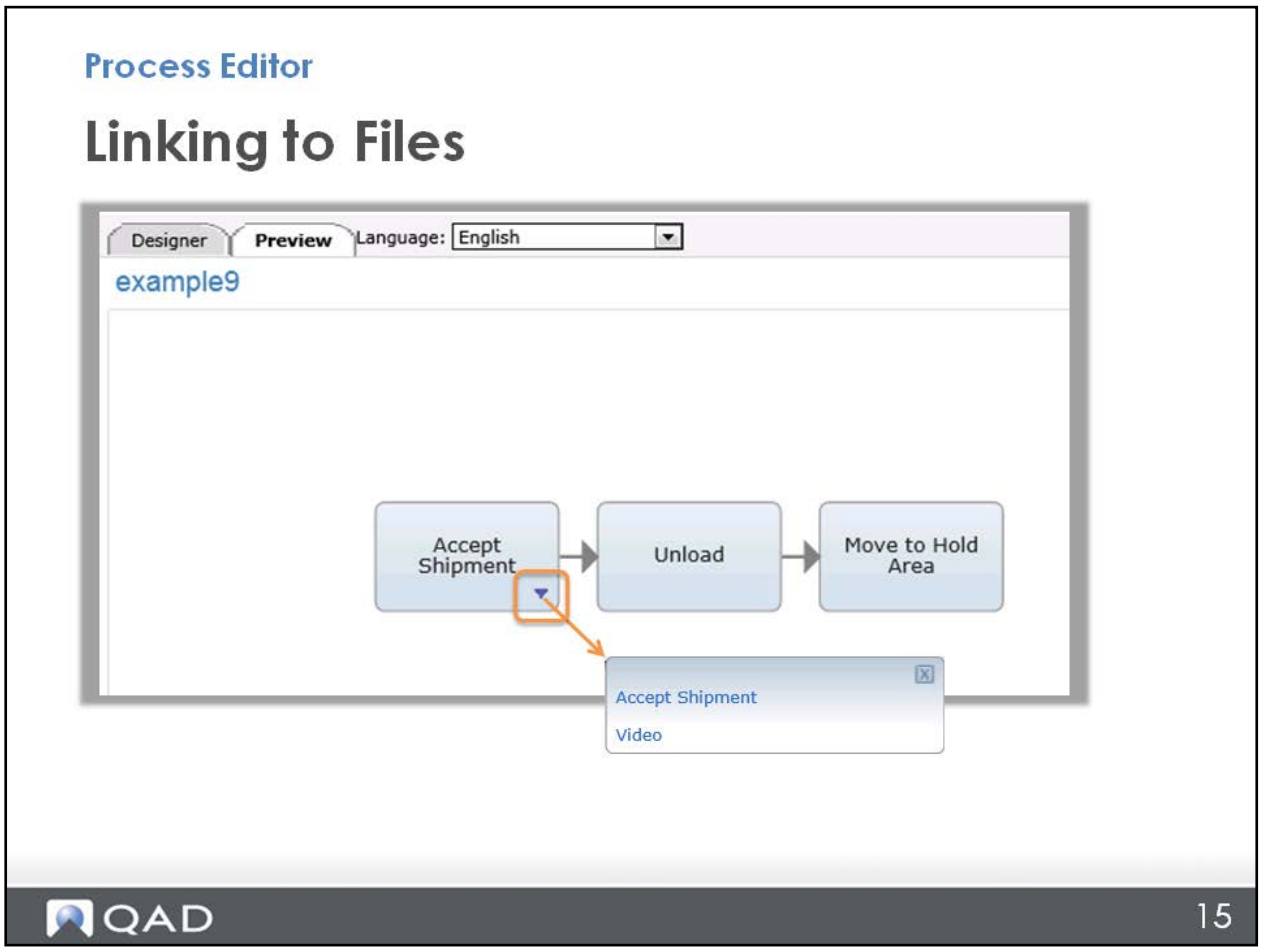
Linking to Files



This time, use the Add More Links button at the bottom of the menu. Remember, you can add up to eight links.

Enter the token (for example: {QAD_VIDEOS}) and then the file name you want to link to in that location—in this case, Accept Shipments.mp4.

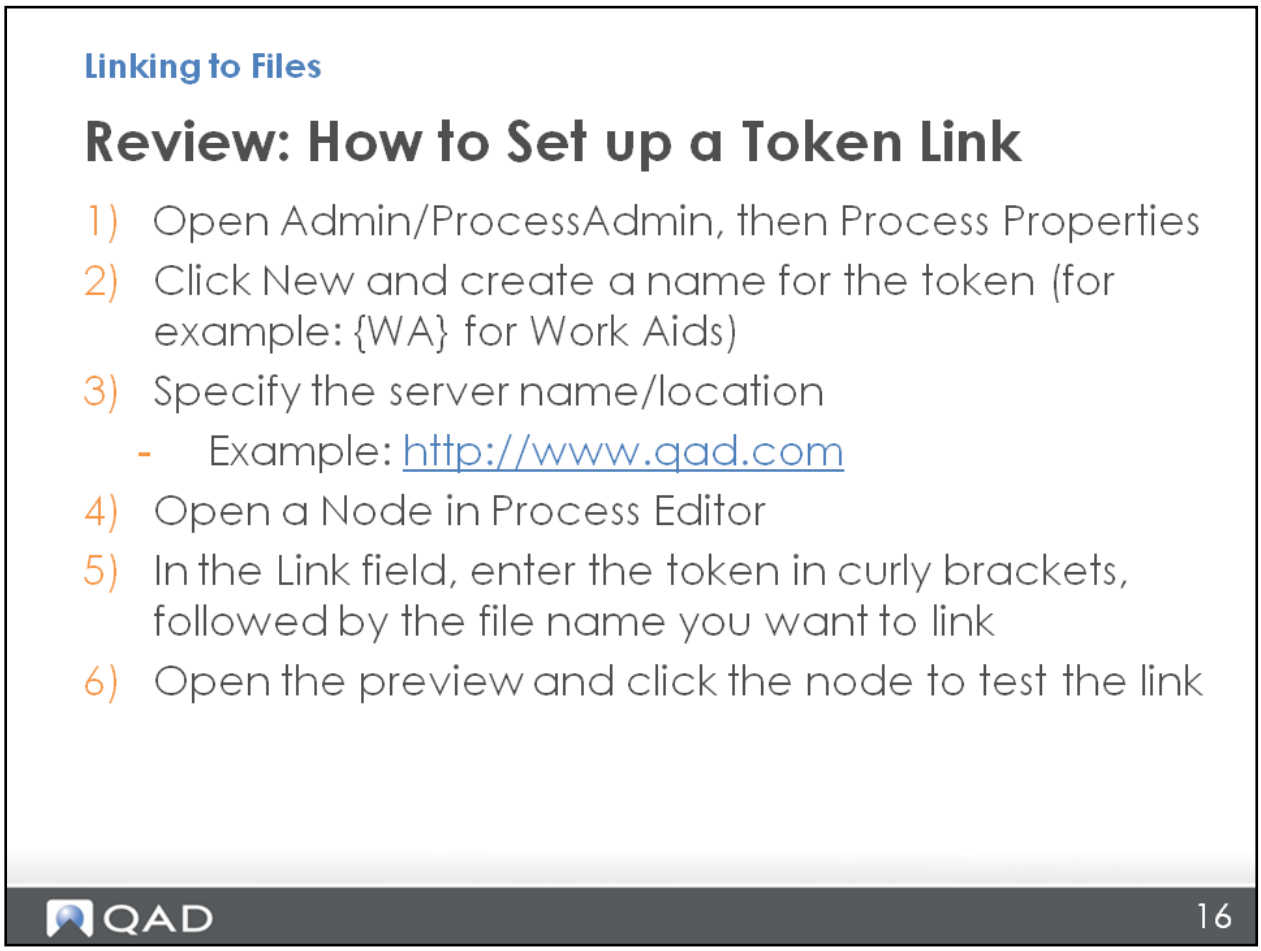
Linking to Files



Now open the Preview again.

This time you have the triangle icon for links, and you can choose to open either the work instruction or the video. Note that when you create a link using the first method, the link is automatically named the node name, so the work instruction file is called “Accept Shipment;” but, when you create links the second way, using the Add Links button, you can choose the name “Video for Accepting Shipments.” In fact, if you want to name all your links, just create them all from the Add Links button.

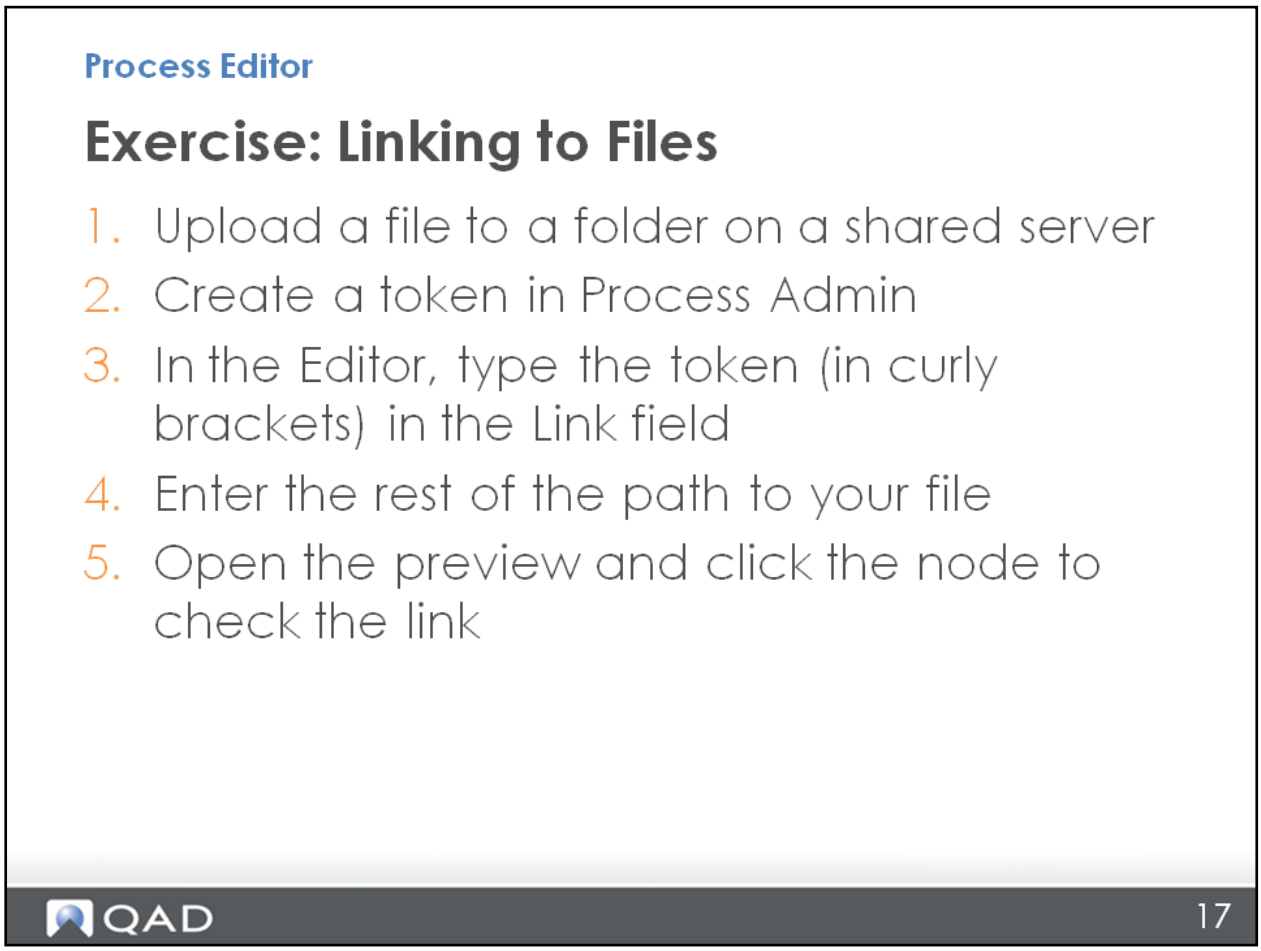
Review: How to Set up a Token Link



To review: Here are the steps to set up a token link.

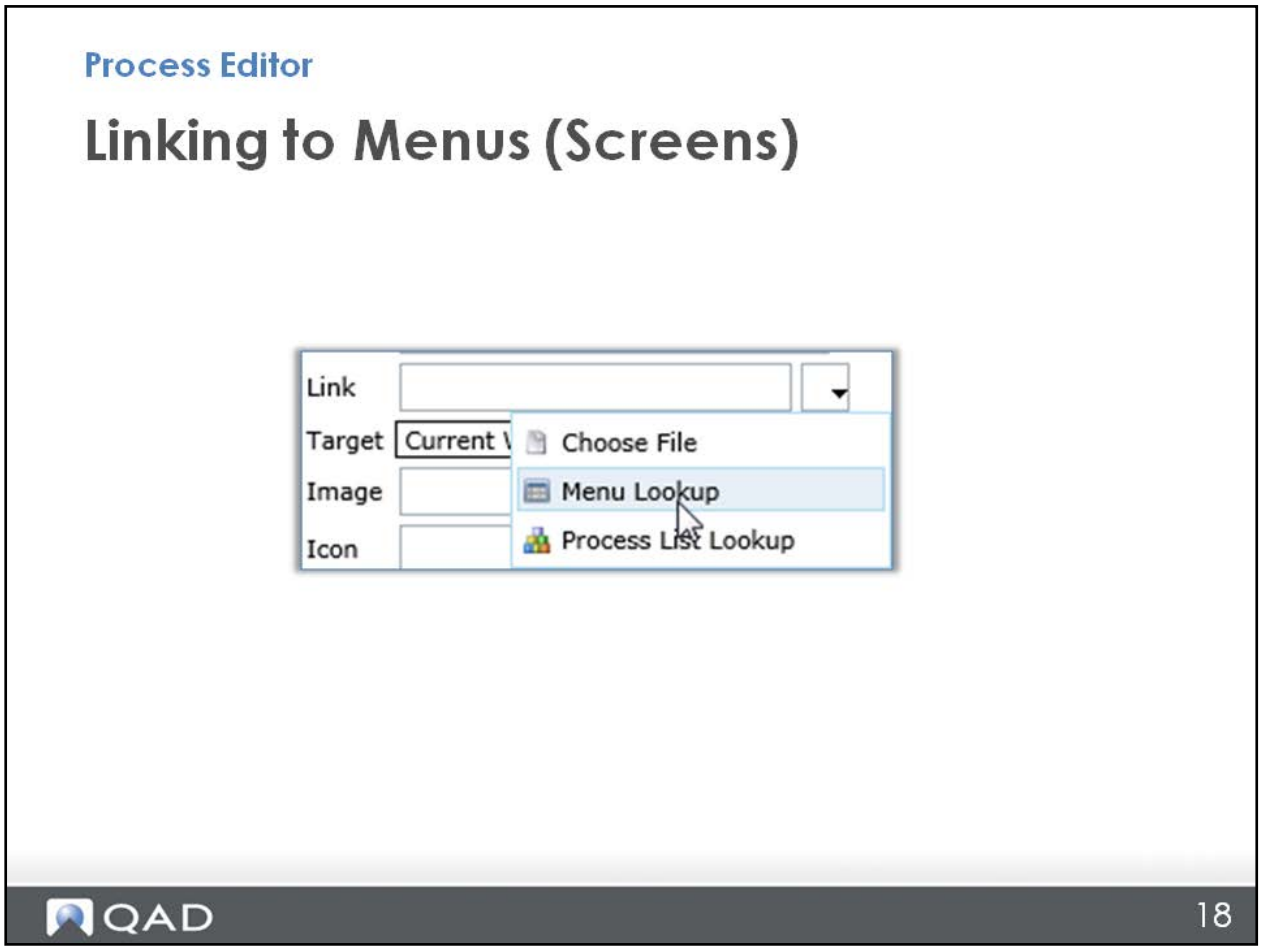
1. Open Process Properties
2. Create token name
3. Specify the server
4. Open a node in Process Editor
5. Enter the token name as the link
6. Preview the link

Exercise: Linking to Files



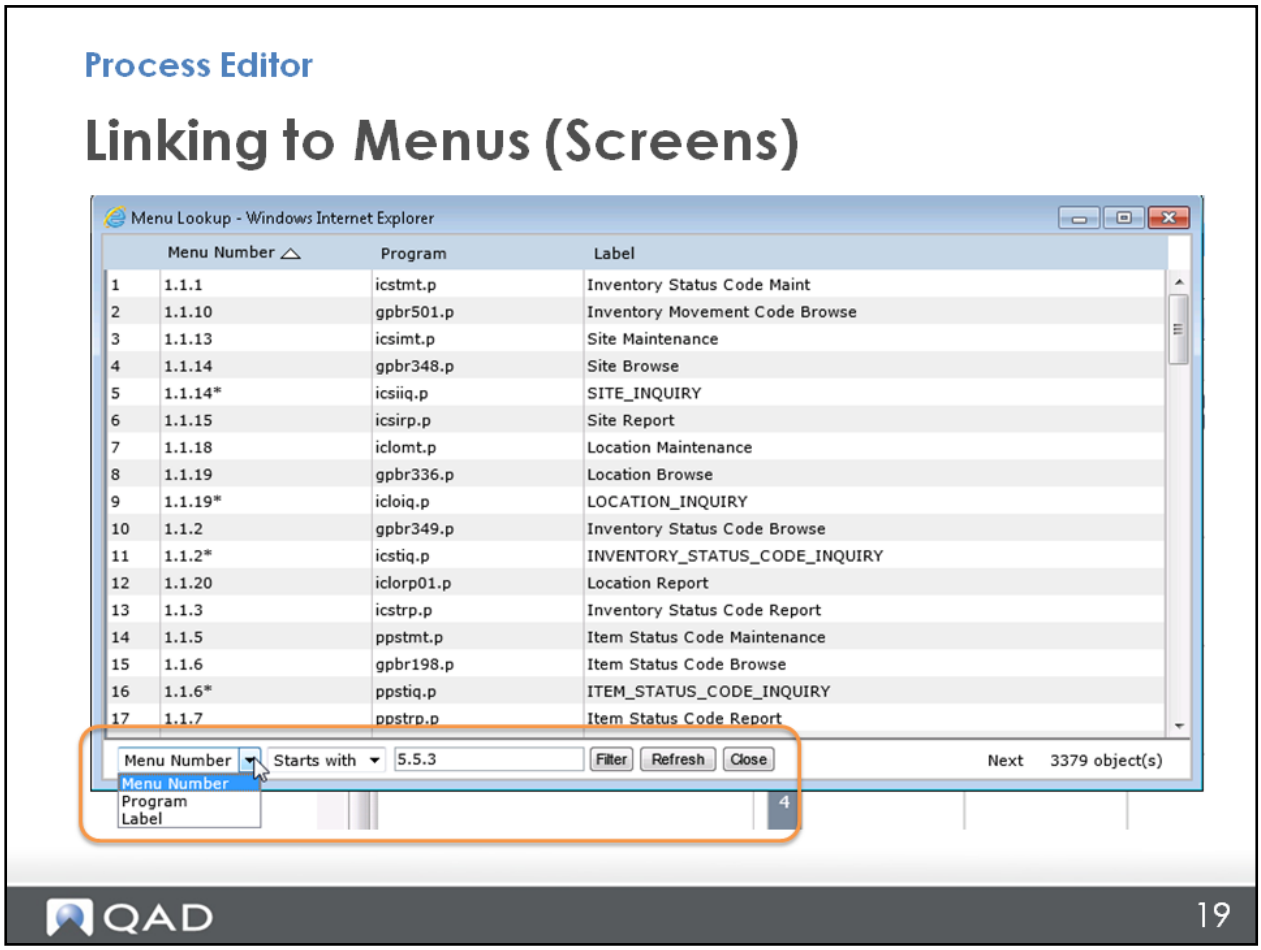
Next, do an exercise to practice linking to files.

Linking to Menus (Screens)



Now link to a QAD screen. You need to enter the program name, which you can find in a few different ways in QAD; the Editor offers this Menu Lookup option, so look at that method first.

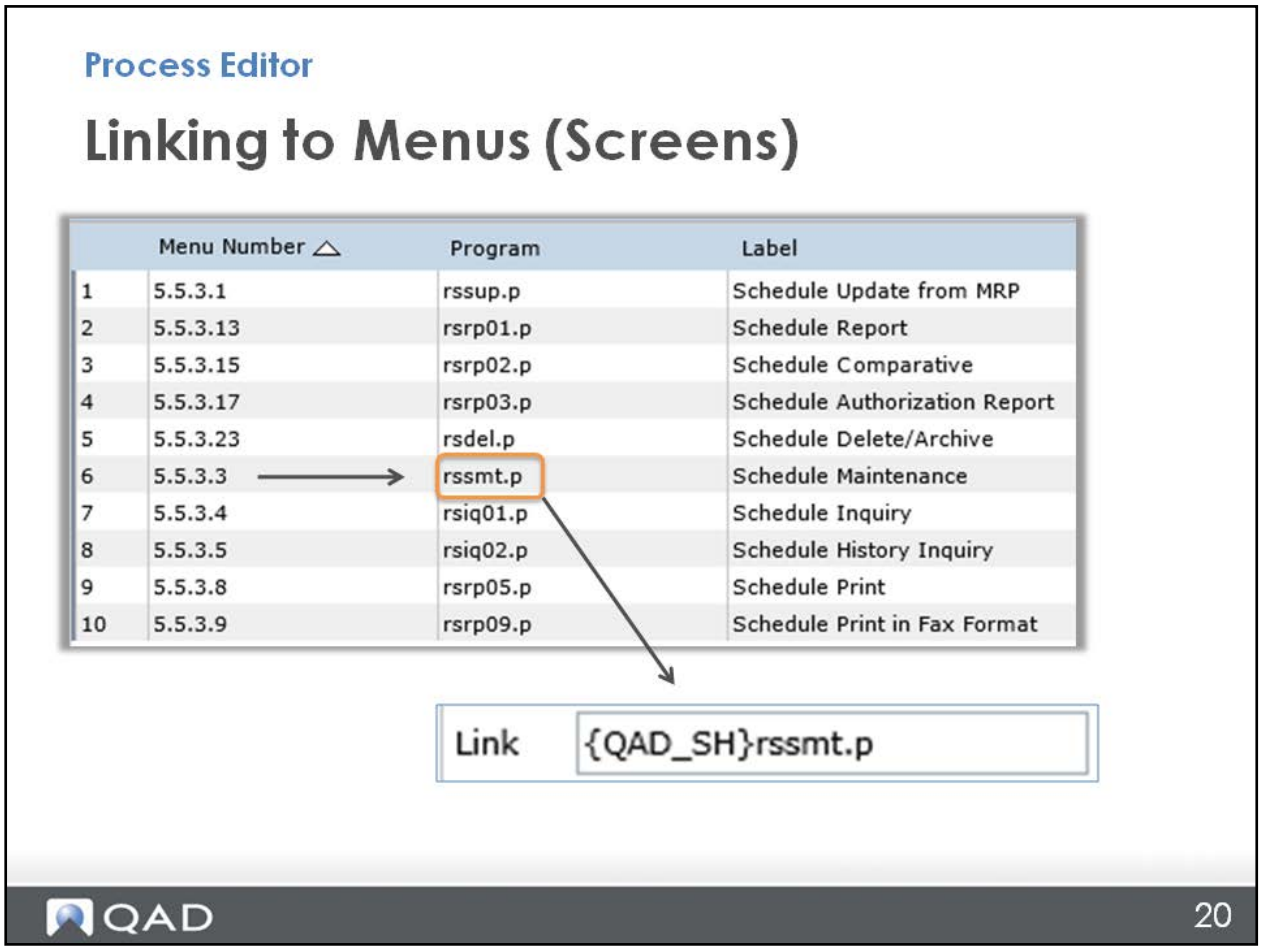
Linking to Menus (Screens)



You can click on the column headings to sort by menu number, program, or label, and you can filter the whole list at the bottom of the page to narrow down your search.

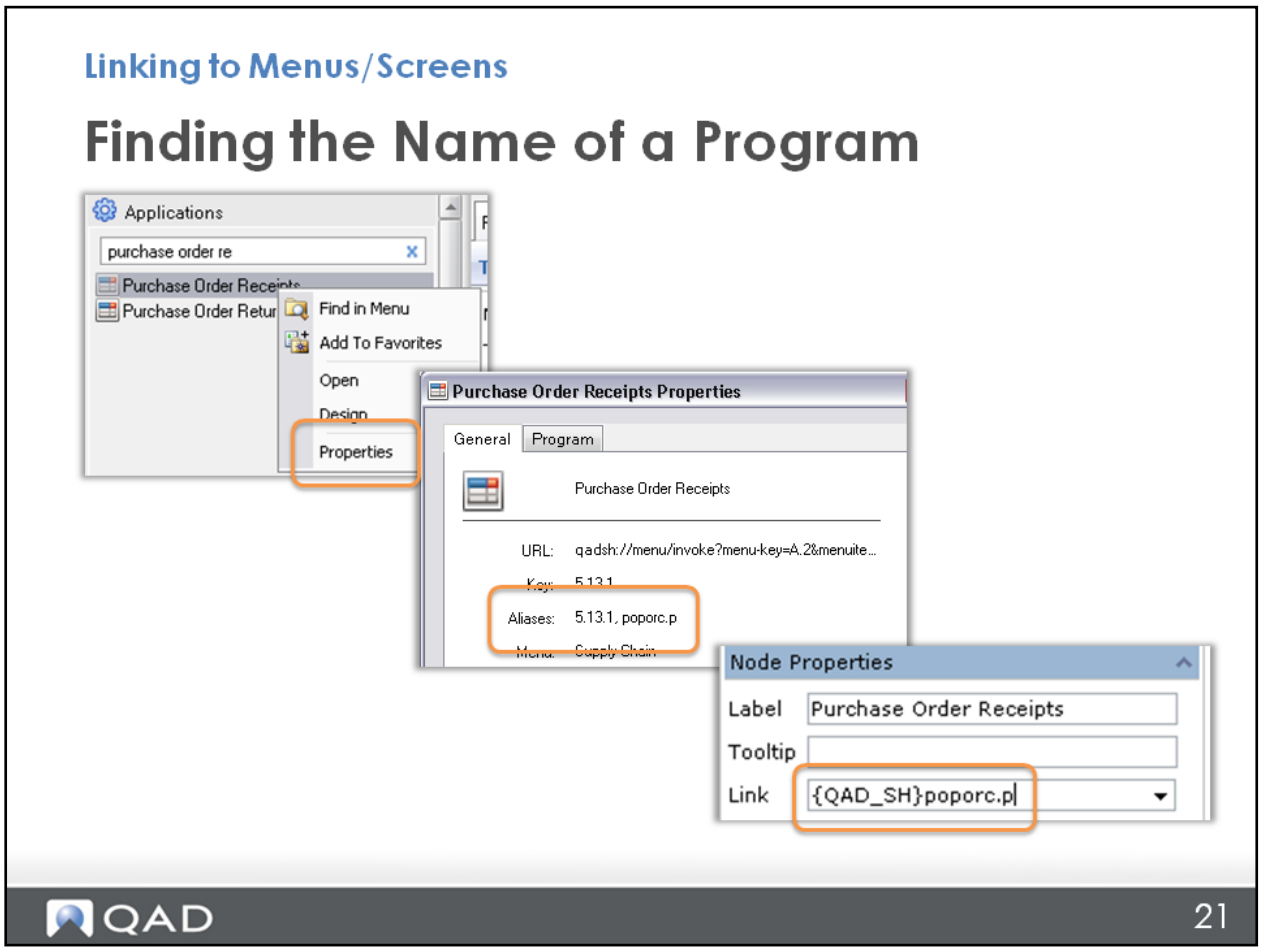
For example, you might remember the first few numbers of the application menu number; enter the partial information, then choose “Starts with,” “Ends with,” or “Contains.” When you click Filter, the list is narrowed down to what you are looking for. To get the original list back up on the screen, click Refresh.

Linking to Menus (Screens)



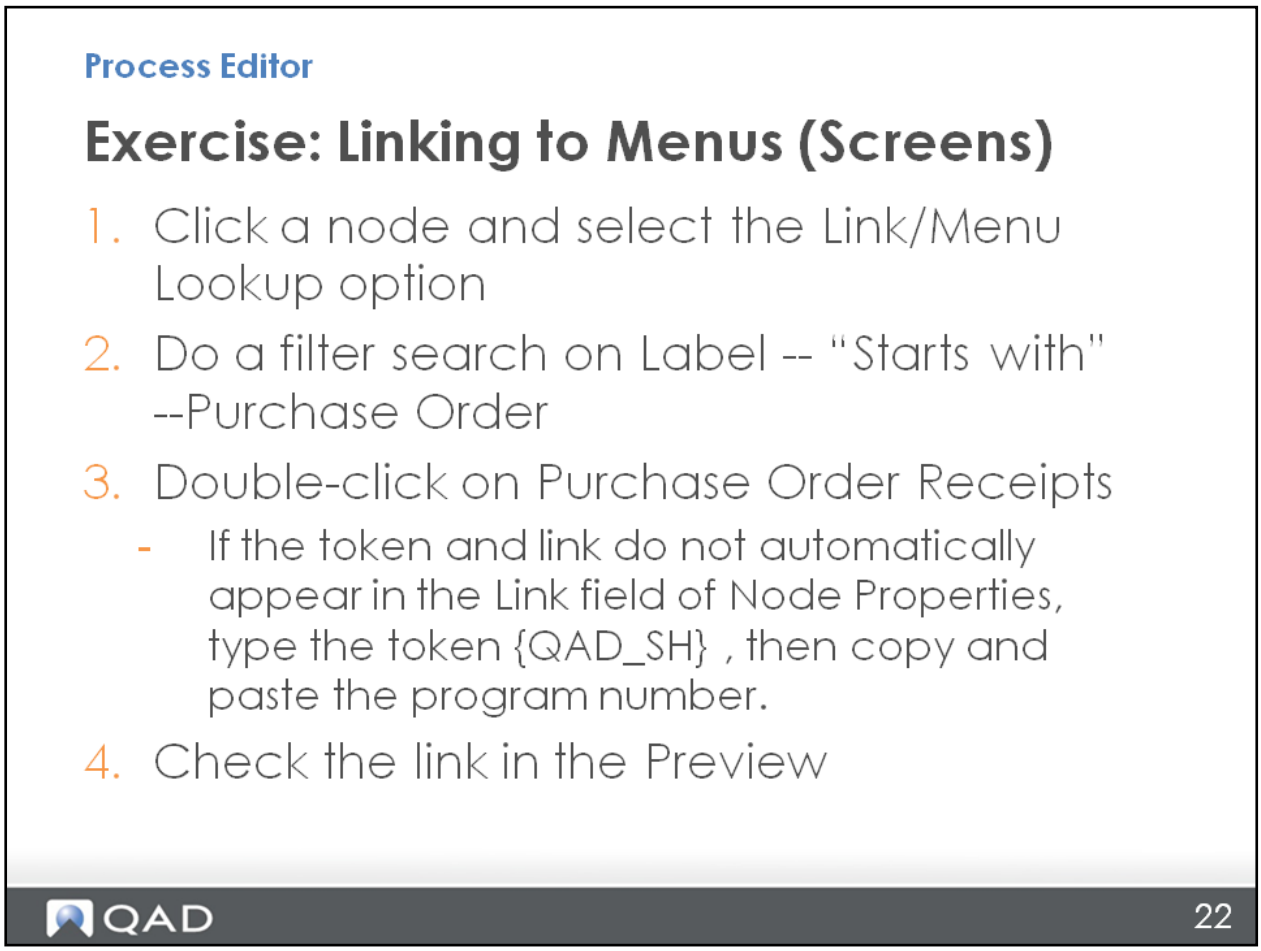
Once you find the program you want, click to choose it. The token and program name are automatically entered in the Link field. {QAD_SH} is the token for linking to menus; this is already set up for you to use when linking to menus. So, alternatively, you could type the token {QAD_SH} into the link field and then copy and paste the program name after it.

Finding the Name of a Program



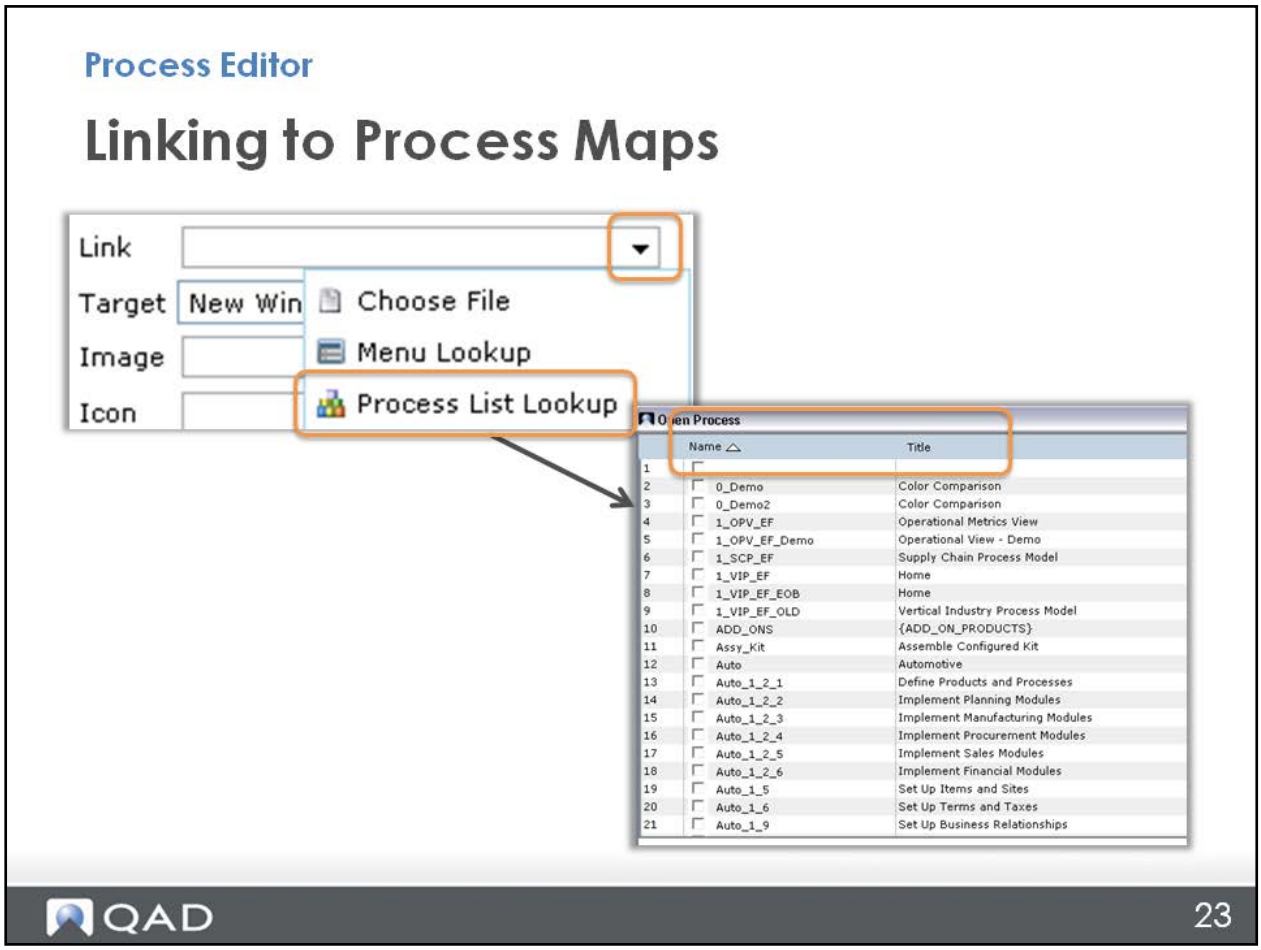
Another way to find a program name is to use the application menu search in QAD. When you find the menu number, right-click on it and select Properties from the drop down list. In the Alias field, you see both a program number (5.13.1) and a system name (poporc.p). This is the program name you add to the Link field in the Process Editor after the {QAD_SH} token.

Exercise: Linking to Menus (Screens)



Next, do this exercise to link a node to a menu.

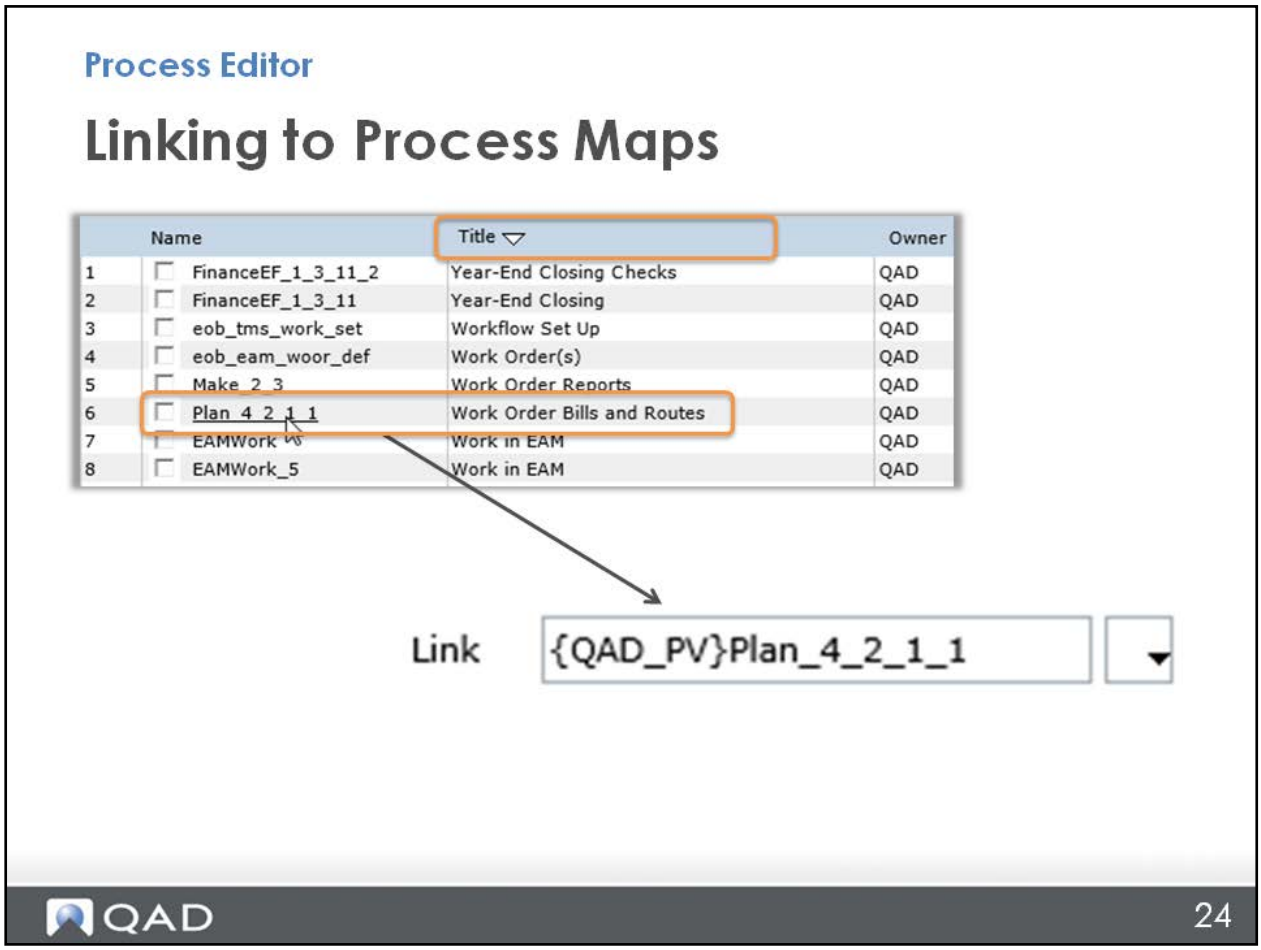
Linking to Process Maps



Next, see how to link to another process map, doing a Process List Lookup.

When you open this option, you see a list of process map names and titles. You can click on the headings to sort the columns.

Linking to Process Maps

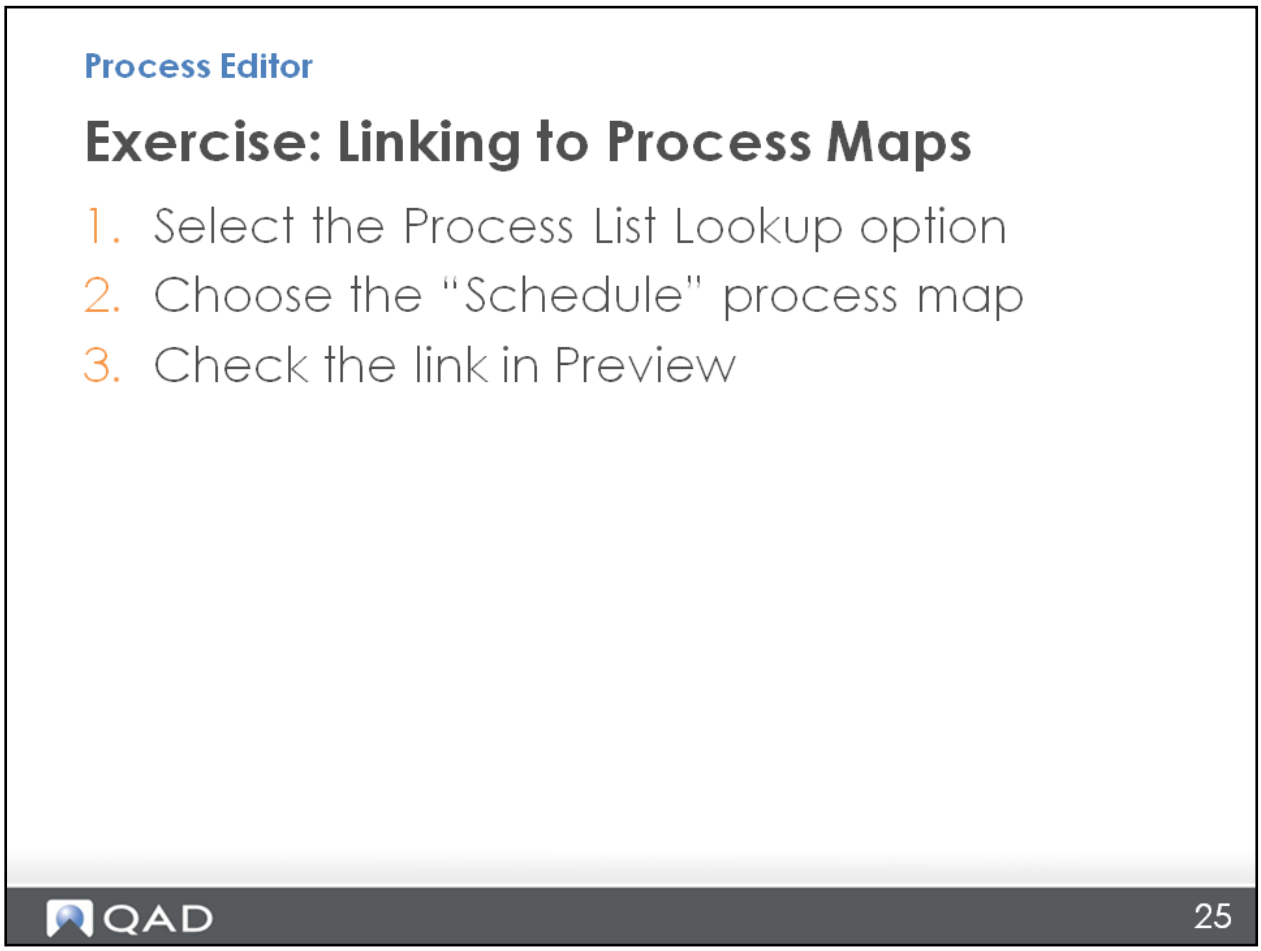


Sorting by title, link to Work Order Bills and Routes (Process Map Name Plan_4_2_1_1).

When you click that link, the system automatically enters the token and process map name into the Link field in Node Properties; your link is automatically created.

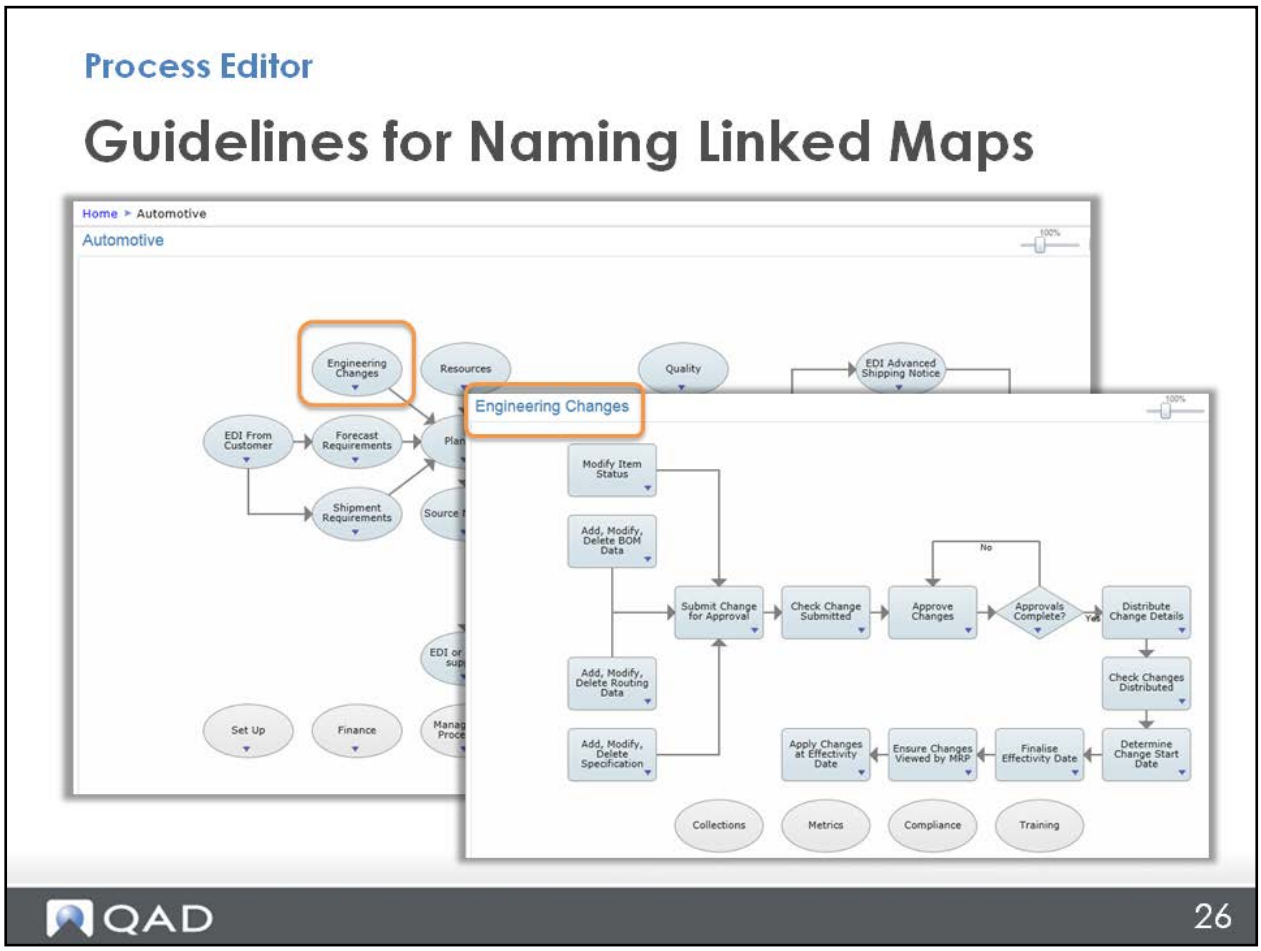
Note that the token {QAD_PV} is already set up in the Editor for linking to process maps, so you could alternatively type that in and then add the process map name.

Exercise: Linking to Process Maps



Next, do this exercise to practice linking a node to a process map.

Guidelines for Naming Linked Maps

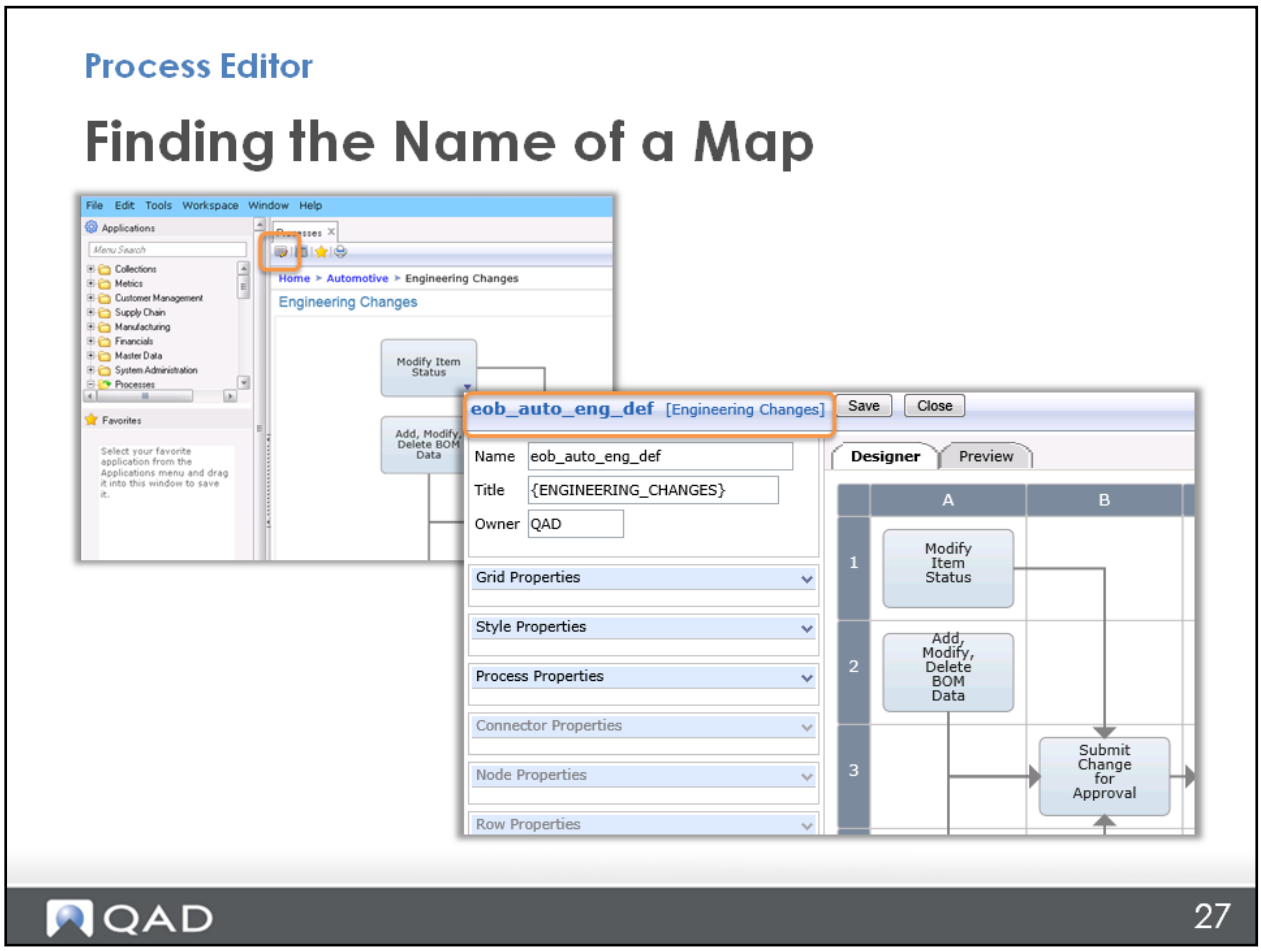


When you are linking from one process map to another, there are guidelines for how to name them.

You want to try to make the new process map name match the node name it is being linked from. If they align, navigation is much easier.

In this example, the Engineering Changes node links to a process map called Engineering Changes. If you named it something else, like Changes to Engineering Specs, it would not match up.

Finding the Name of a Map



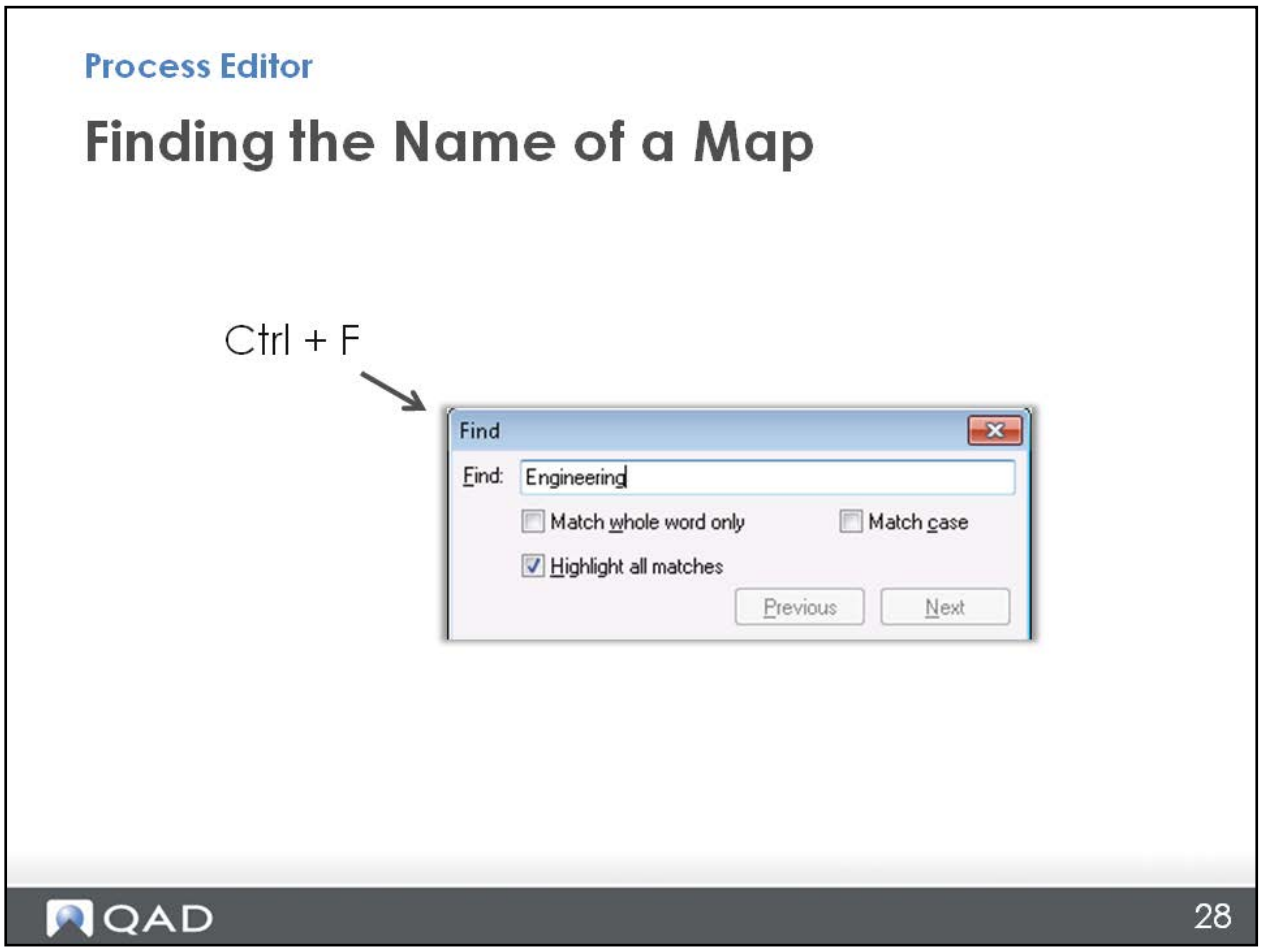
To make it easier for you keep node and map names consistent, there is a simple way to find the name of a process map you want to link to.

Start by navigating to the destination map; in this example, it is called Engineering Changes.

Click on the Process Editor icon, and you find the system name of the map at the top of the Process Editor and in the Name field.

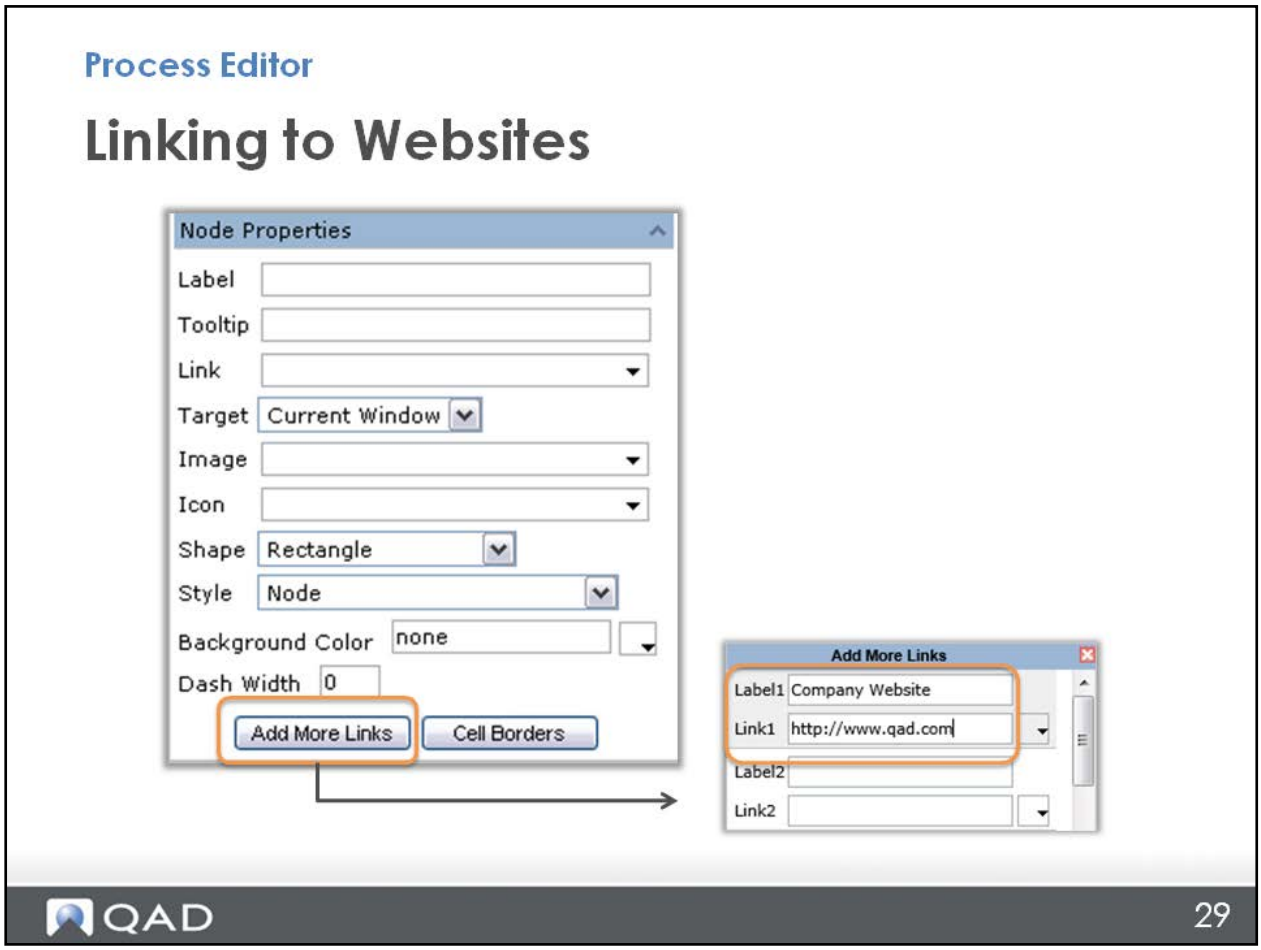
Once you know the name of the target process map, you can scroll through the Process List lookup to identify the correct link.

Finding the Name of a Map



You can also search by words to find process map names by pressing Ctrl+f on the keyboard to bring up a window where you can enter key words in the Find field.

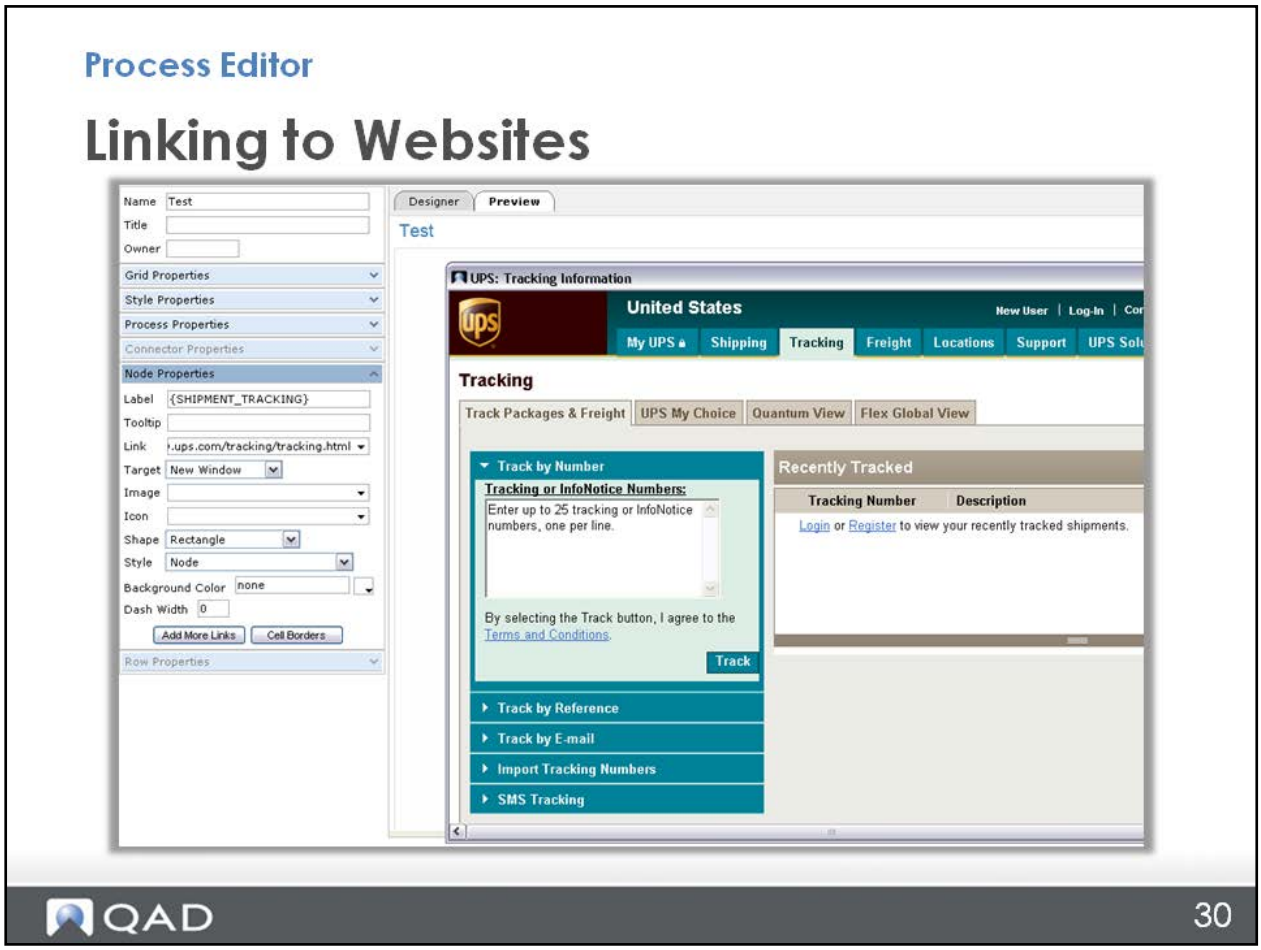
Linking to Websites



You can also add a link to a website.

This is done the same way as adding any other type of link, but you can simply type the website address directly into the Link field as opposed to searching through lists. If you use a particular website often, you probably want to create a token link for it, too. Make certain to use the format “http://www.“

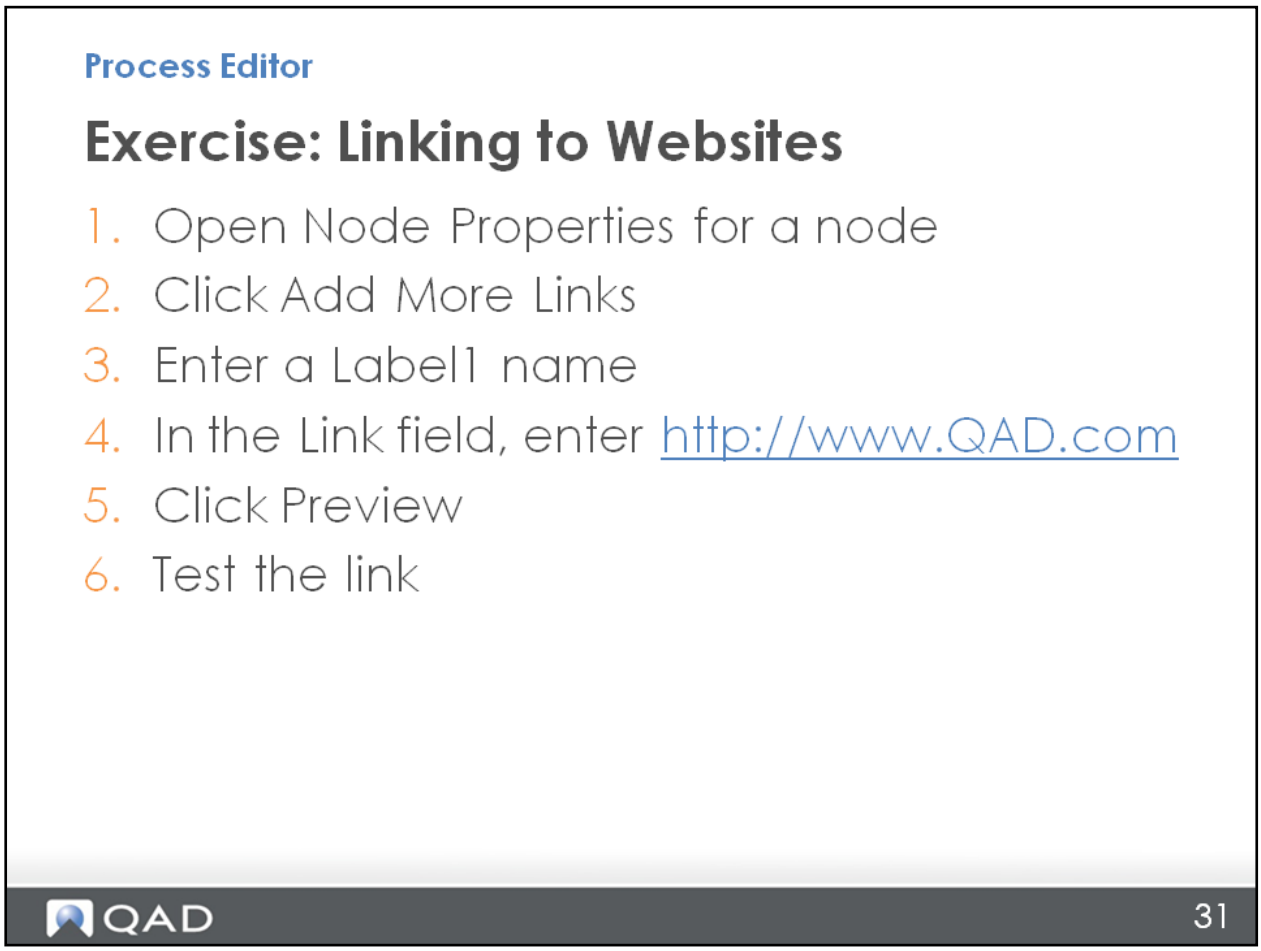
Linking to Websites



In this next example, you add a link to the UPS tracking website.

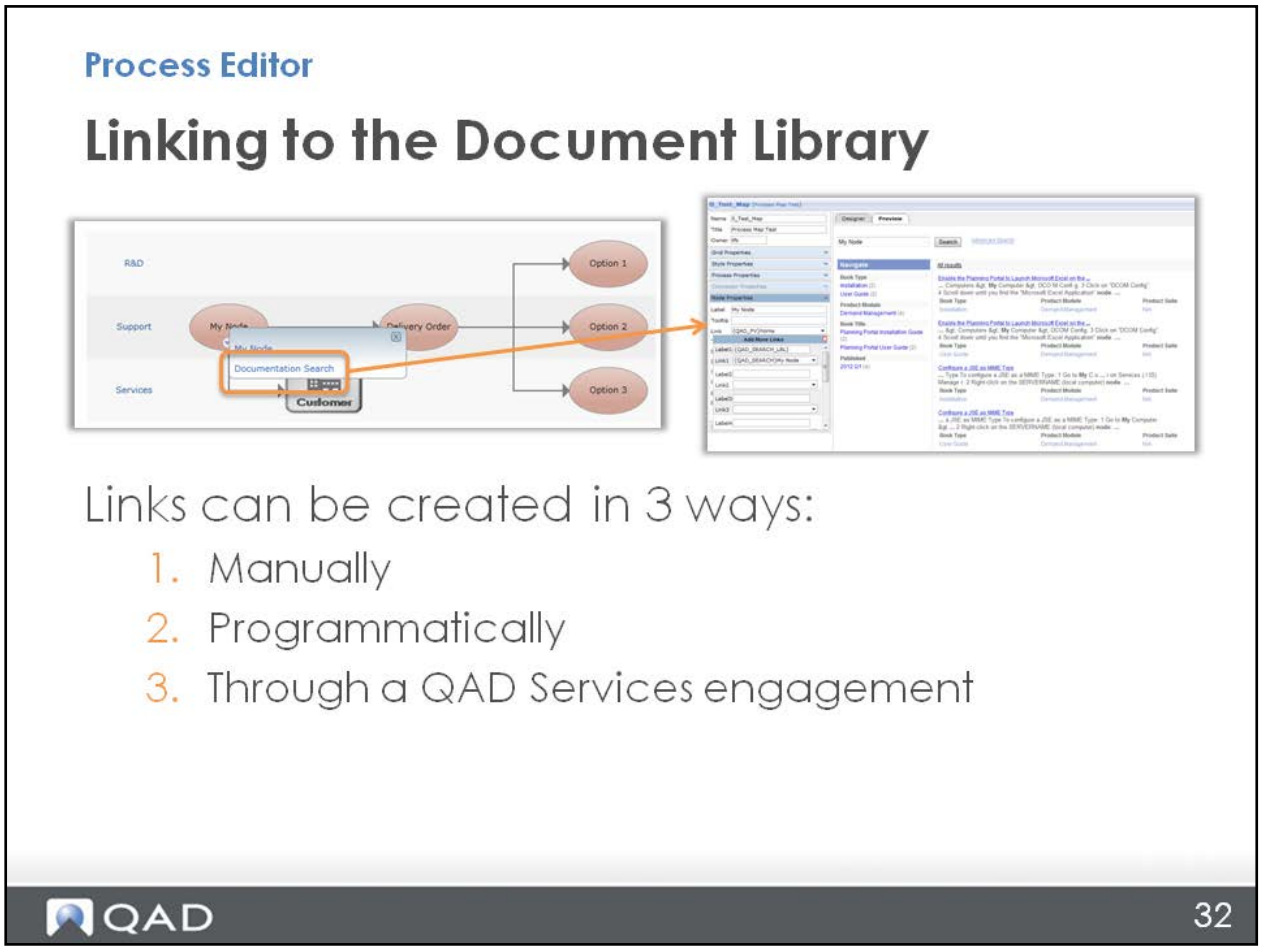
First, in the Process Editor, click on a node. In the Node Properties menu, type Shipment Tracking in the Label field. (Note the best practice of using a system standard name.) In the Link field, enter the UPS tracking website. Then specify if the target should open in a new window or the existing one. For this example, select New Window. In the Preview mode, clicking the Shipment Tracking icon opens the UPS tracking website where you can enter your UPS tracking number.

Exercise: Linking to Websites



Next, do another exercise to practice linking to websites.

Linking to the Document Library



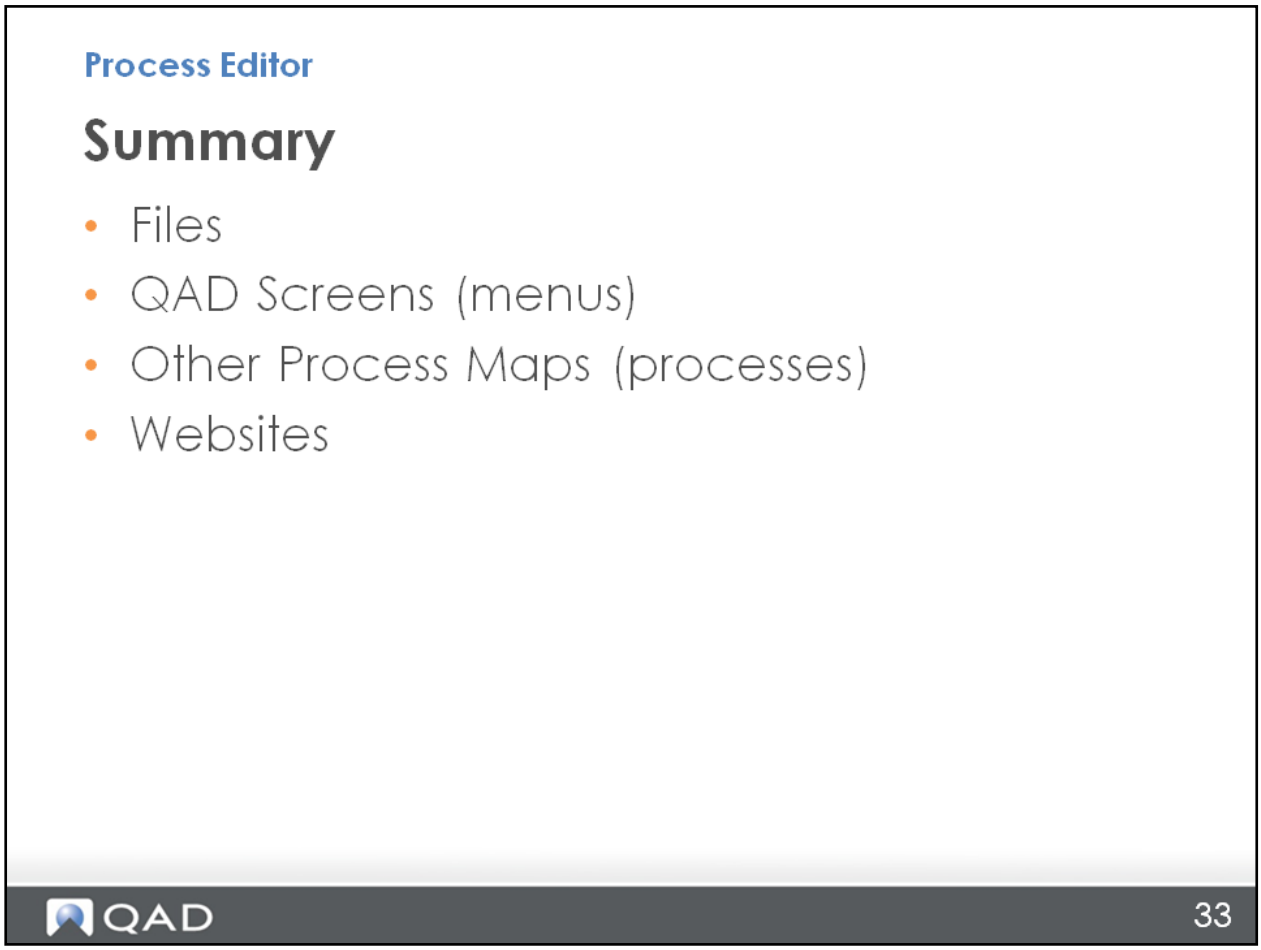
Finally, although the newer process maps already have links to the Document Library, if you do not have them, there are three ways to set them up:

- Create the linkage manually
- Add the link programmatically
- Have a QAD consultant do it for you with a Services engagement

For a Services engagement, contact your QAD consultant or "education@qad.com" to inquire. For the other methods, see the Appendix of

this training guide for information on how to do it.

Summary



Now you know how to create links to all kinds of supporting resources for the steps in your process.

In the next section, you will do an assignment to create links on your own process map.

CHAPTER 6

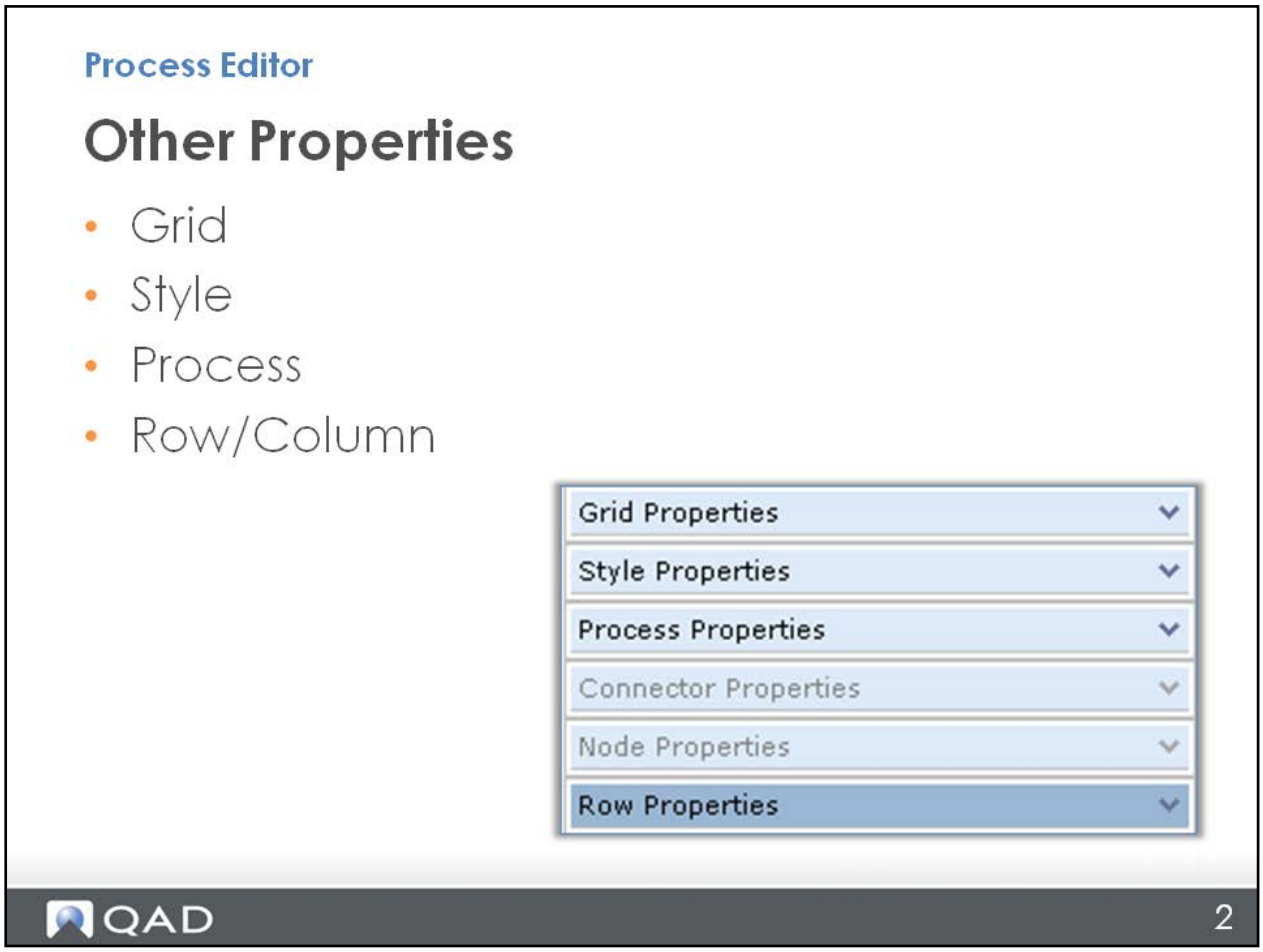
Other Properties

Up to now, you have learned mostly about the node and connector properties that you will probably use most often. There are other properties that you should know about, though. They are covered in this section.

To watch a video of this section, go to the Learning Center (http://learning.qad.com) and use the Smart Search tab to search the key words “Process Editor.” Take the sixth section (6 of 9) called “Other Properties,” Course # OLT-006880.

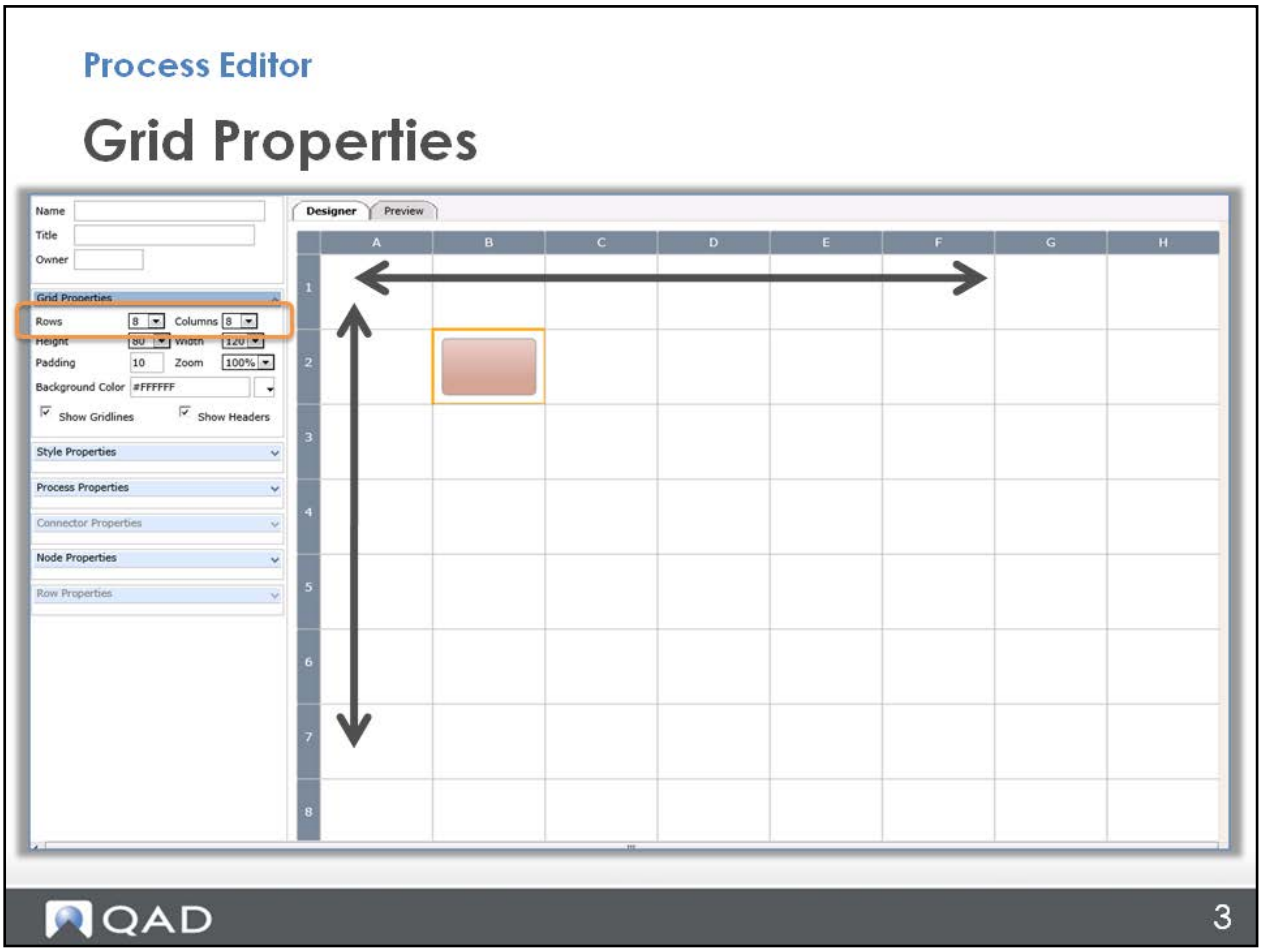
Or, if you are already logged into the Learning Center, just click here:
https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?id=22506432652

Other Properties



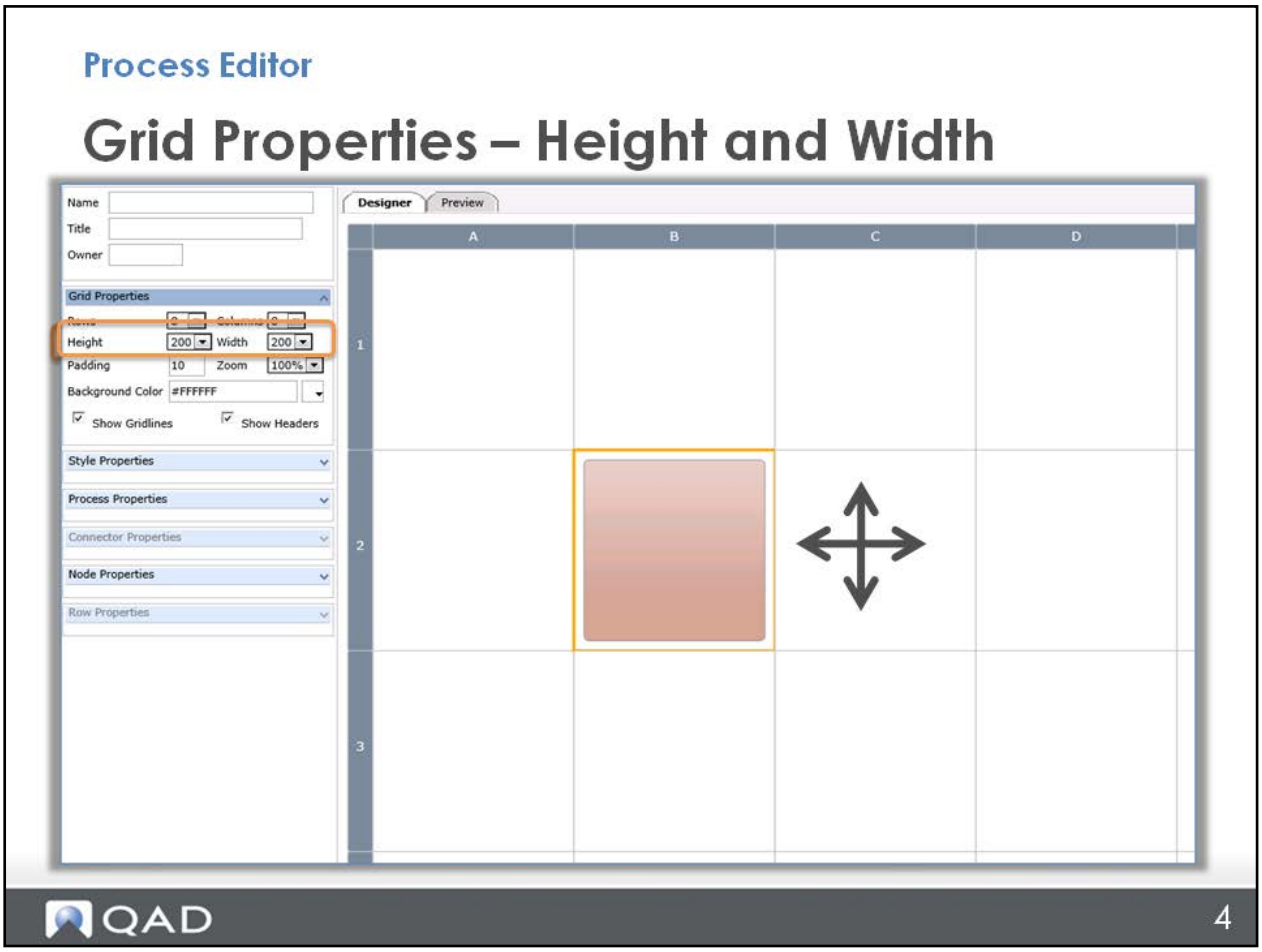
First, look at Grid, Style, Process, and Row/Column Properties.

Grid Properties



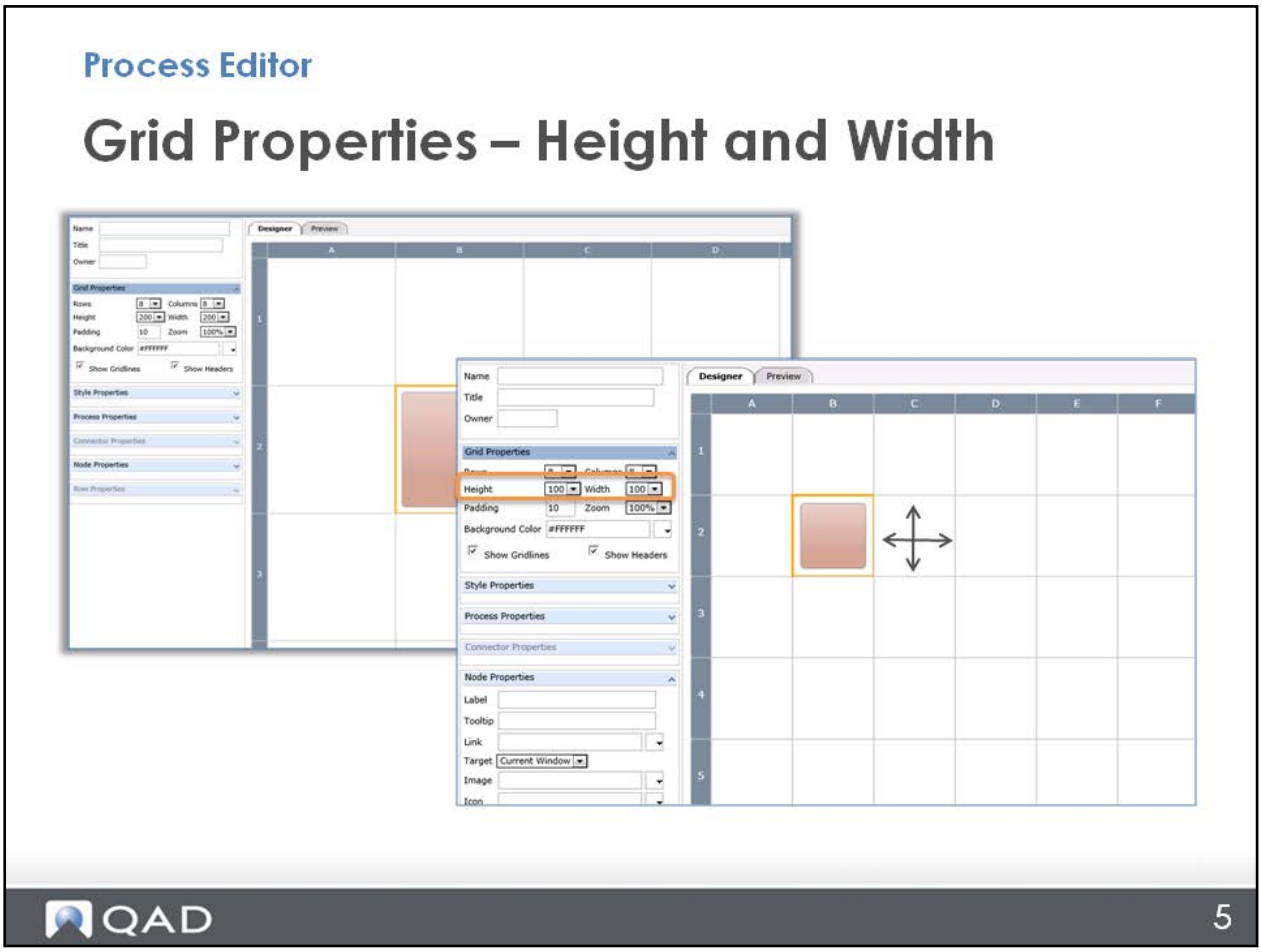
Use Grid Properties to change the overall display of the Process Editor; for example, the number of rows and columns in the grid. The default is six of each, but you can have from 1 – 12 rows and columns. If you add rows or columns, you may need to reduce the size of the cells in the grid so they all display.

Grid Properties – Height and Width

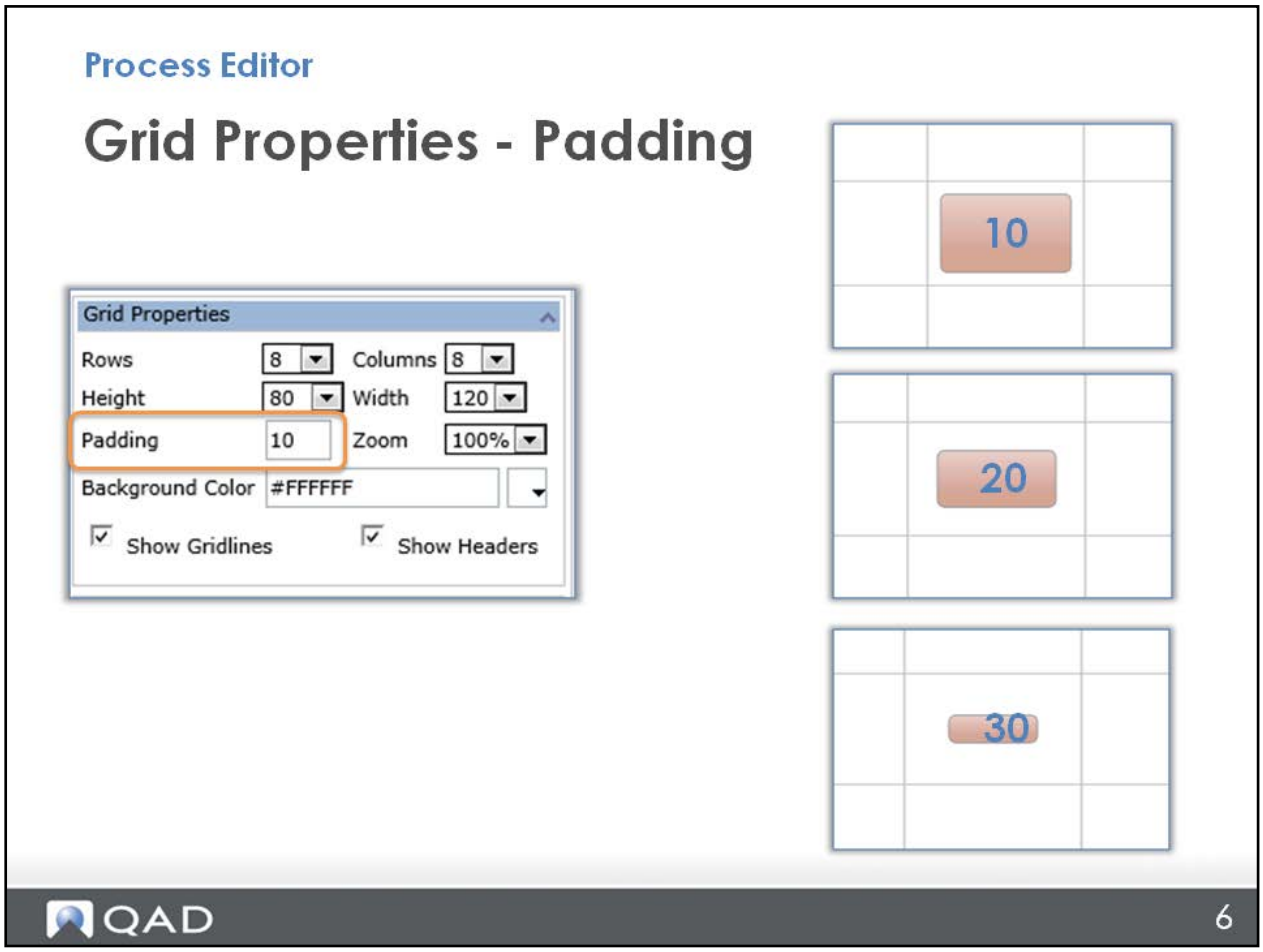


To change the size of the cells and the grid, enter a height and width here.

Grid Properties – Height and Width

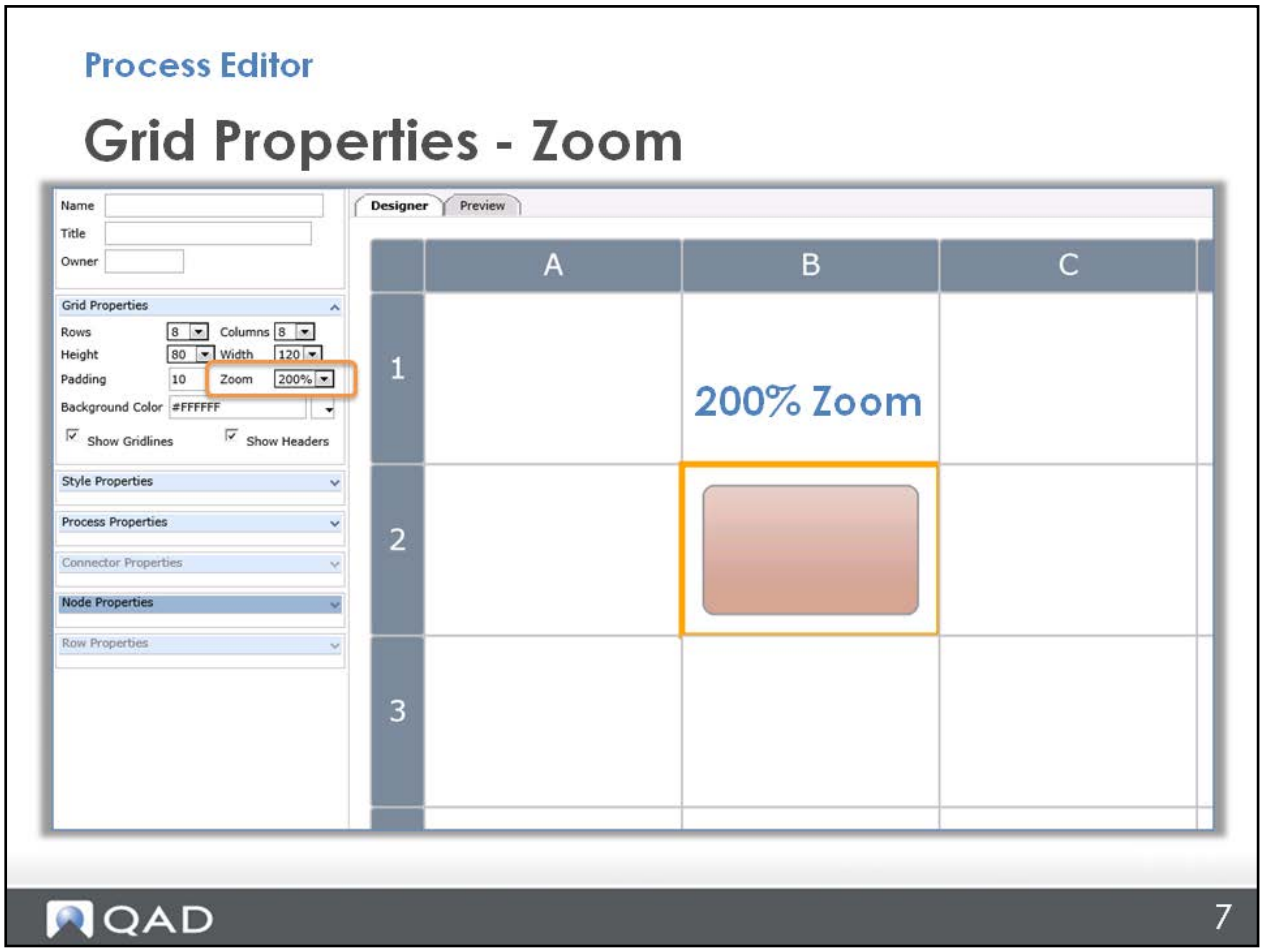


Grid Properties - Padding



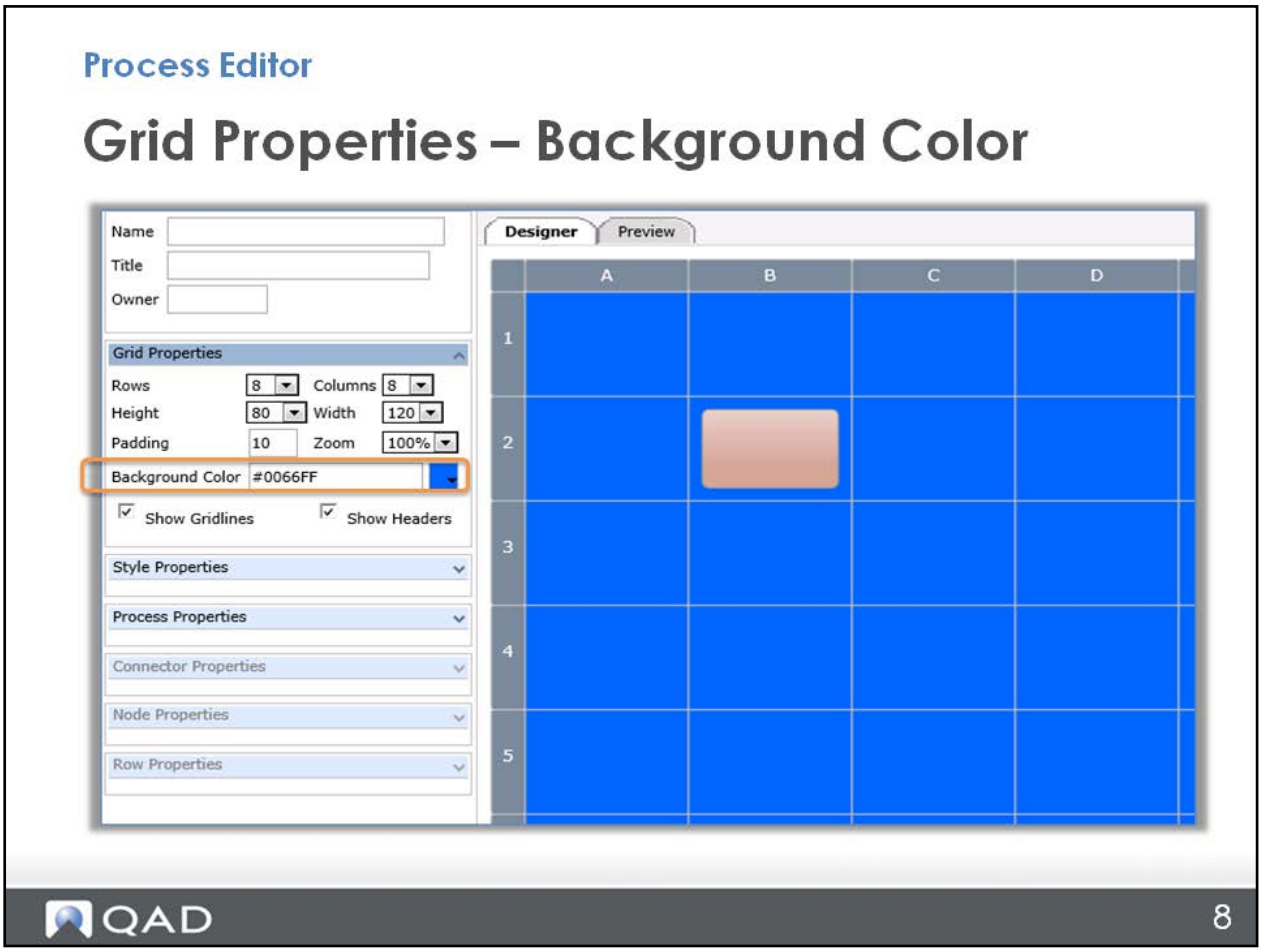
You can change the padding, which is the amount of space around the outside edges of a node within a cell. (When you change the padding of a cell, it affects the padding of ALL the cells in the grid.)

Grid Properties - Zoom



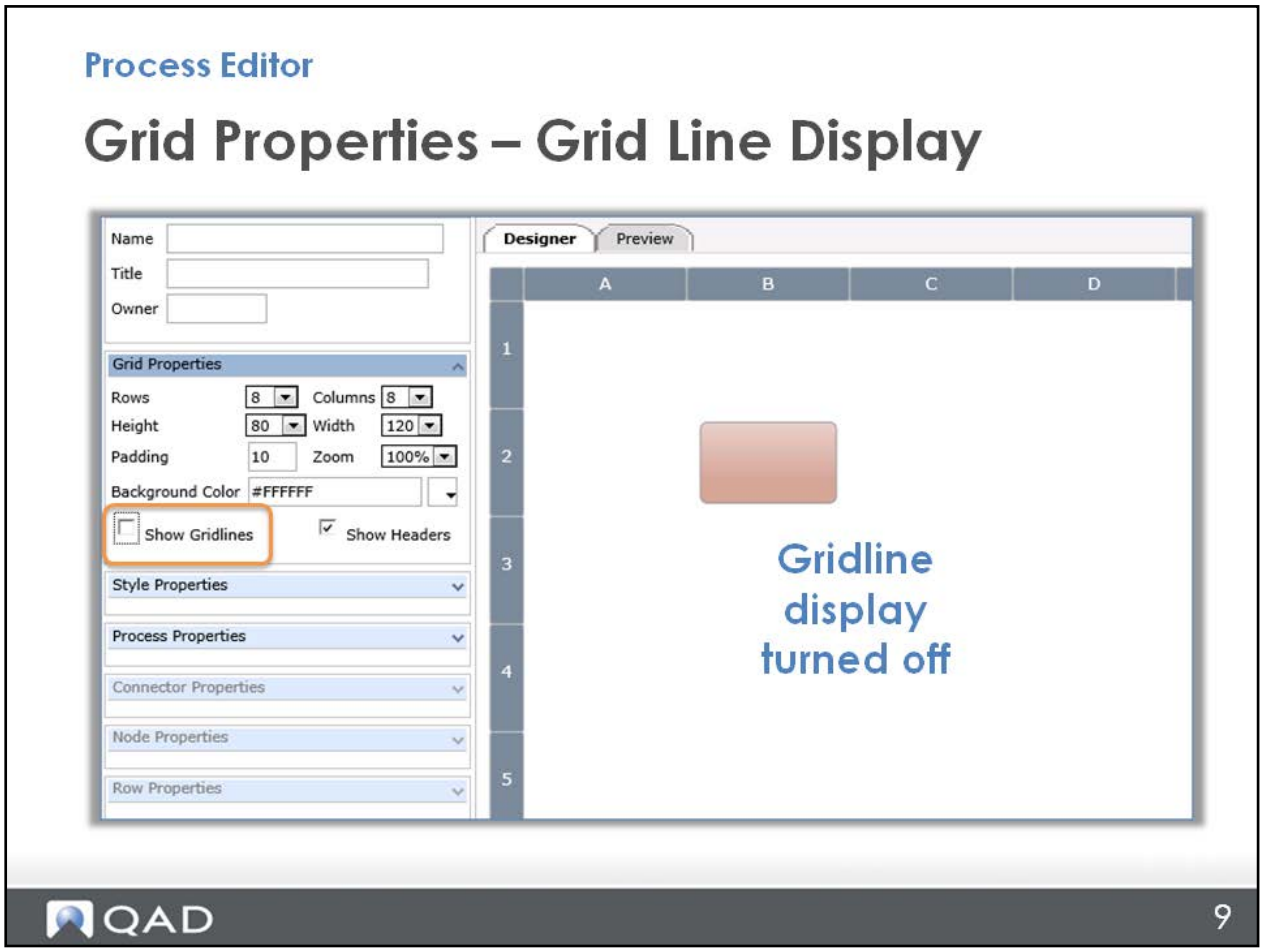
You can specify a zoom level to come in closer or scale back, based on a percentage value, like in this example, which is zoomed in 200%.

Grid Properties – Background Color



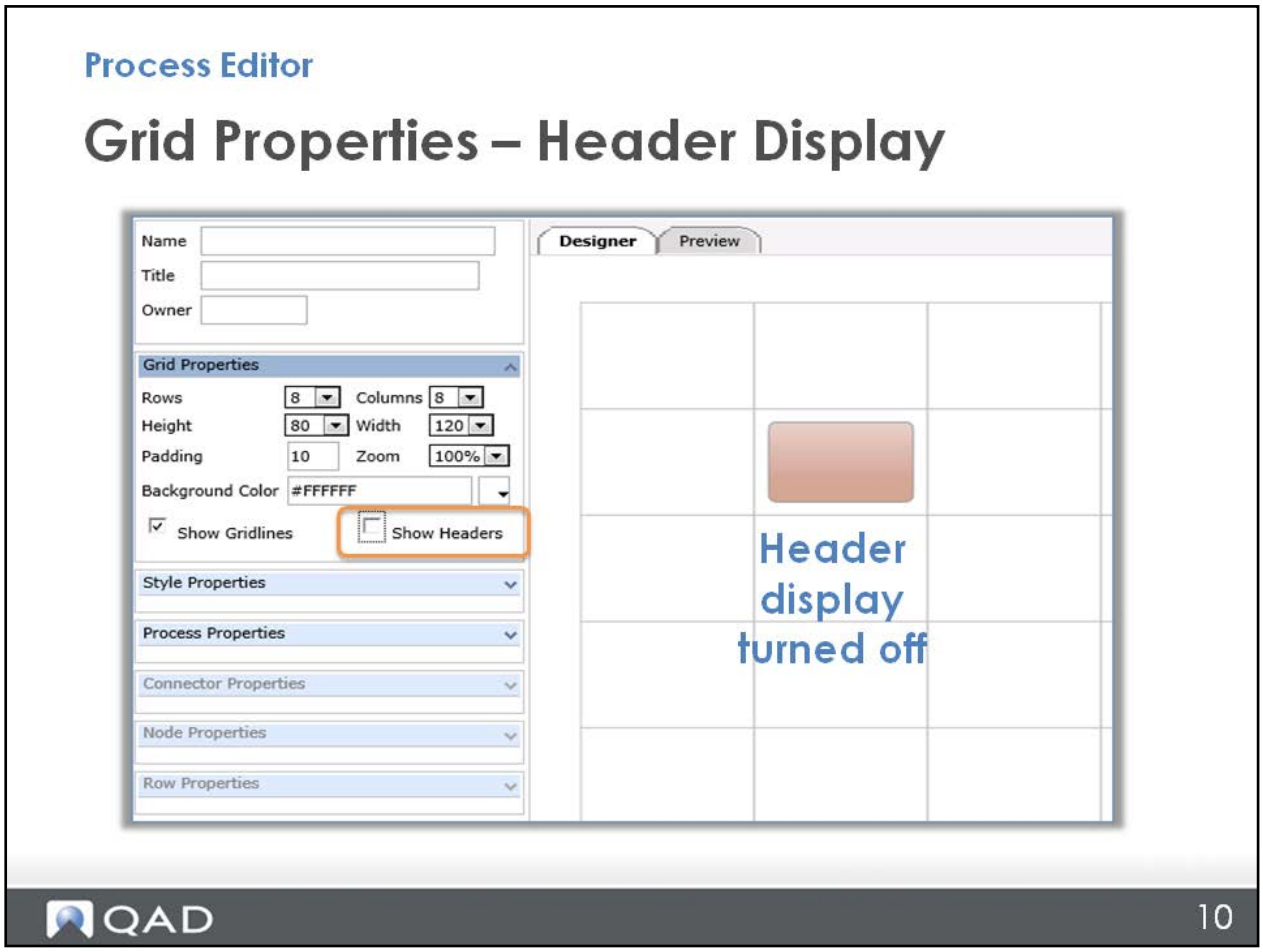
You have the option in Grid Properties to change the background color of the entire grid. The default is white, and you are encouraged to maintain this QAD standard, but you do have the option here. For example, you might change background color on a map that is going to another level of the SCOR model; you link from a Design map to a Planning map and you want to make that distinction. Or, you might change background color when you are showing two different teams that are working together and you want to differentiate the tasks for each.

Grid Properties – Grid Line Display



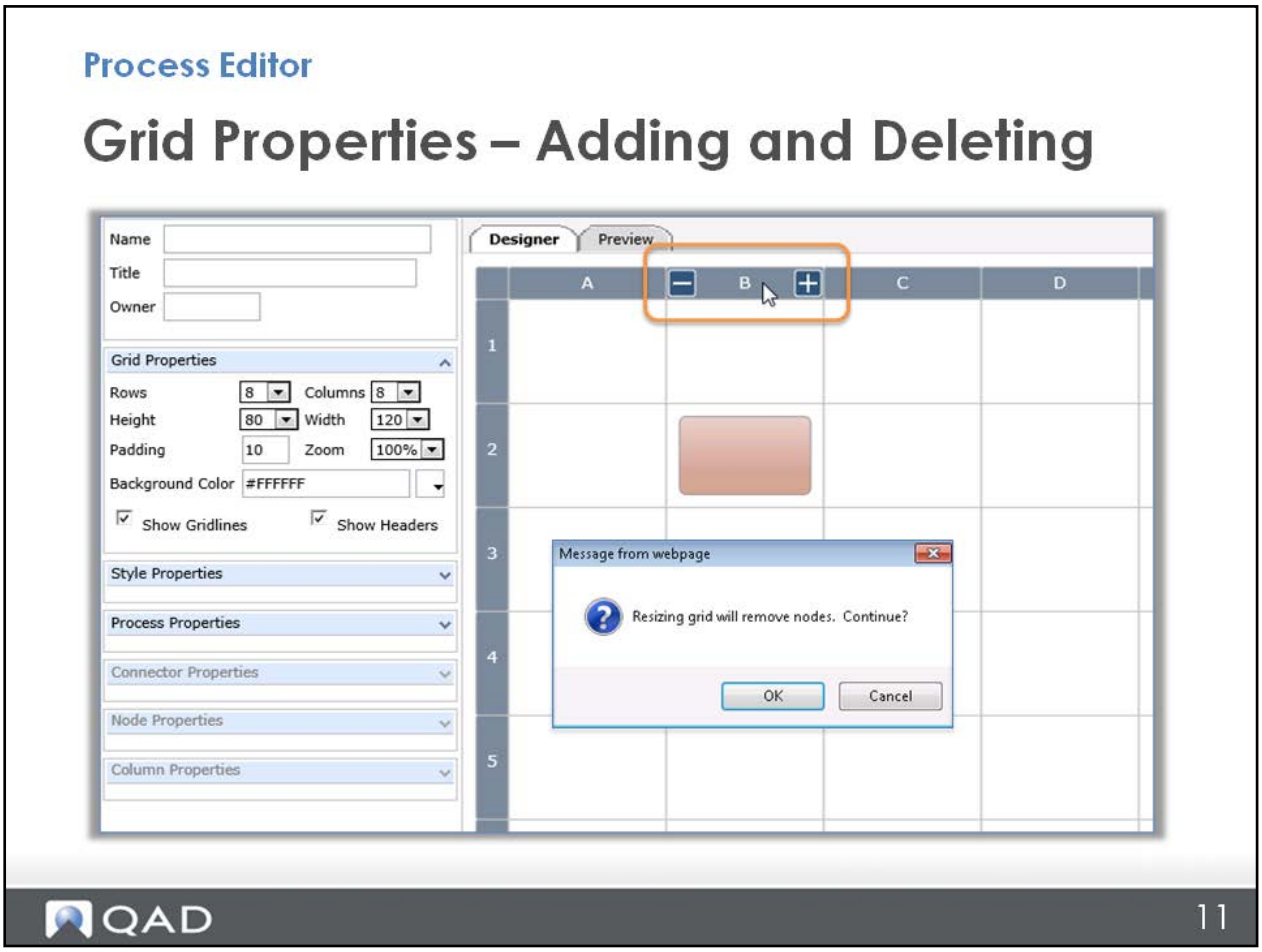
You can also choose to display the grid lines or not.

Grid Properties – Header Display



You can also choose to display the headers or not. (Headers are the numbers and letters that identify the rows and columns.)

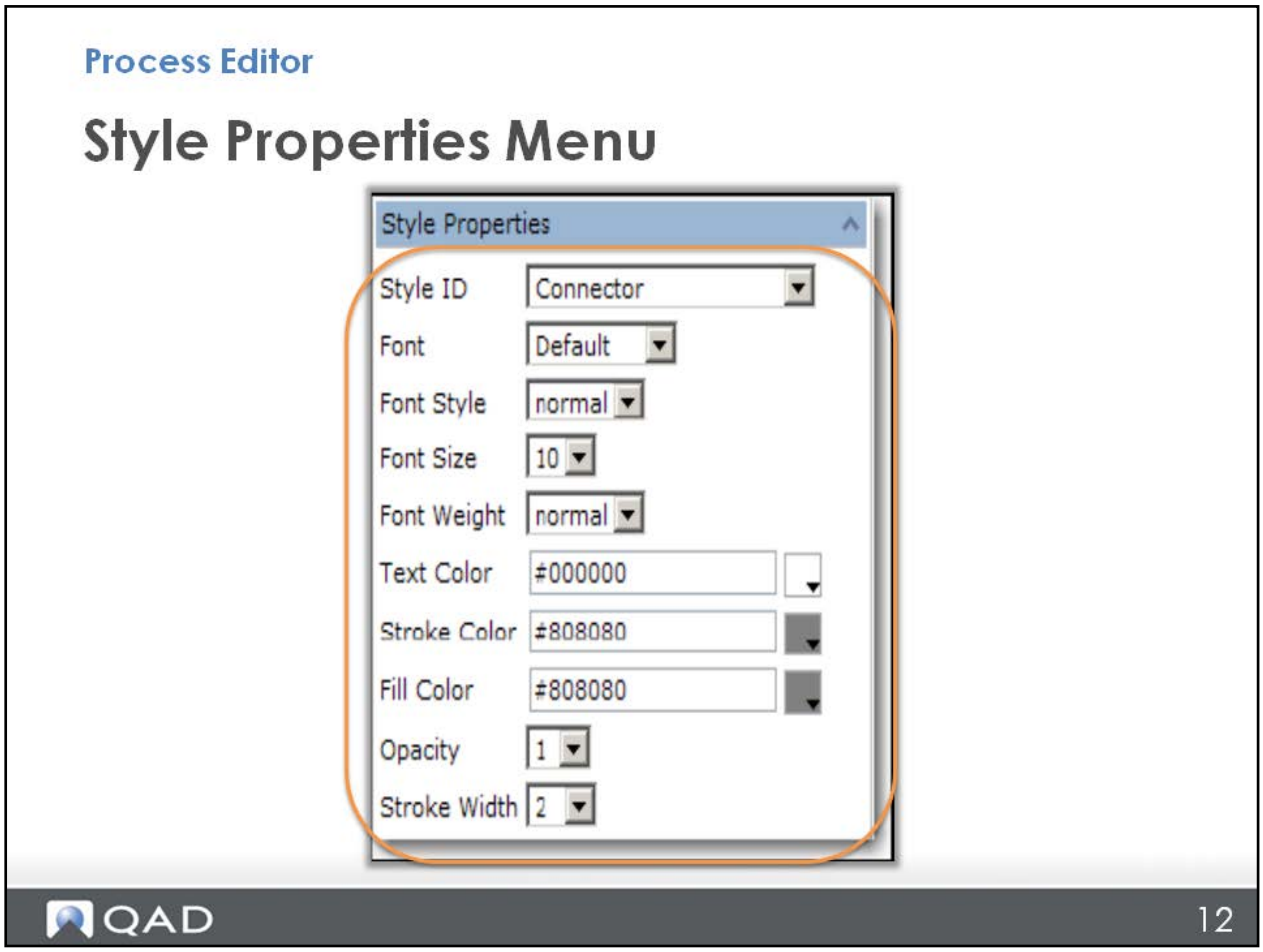
Grid Properties – Adding and Deleting



If you are displaying the headers, you can also add and remove columns and rows directly within the grid. When your cursor hovers over the header row, a plus (+) and minus (–) sign appear. Click the plus to add a row or column; click the minus to remove it.

Note: If you attempt to delete a row or column that already has a node in it, you receive a warning message.

Style Properties Menu



The Style Properties menu in Process Editor is used to change specific styles or designs associated with node shape and connectors.

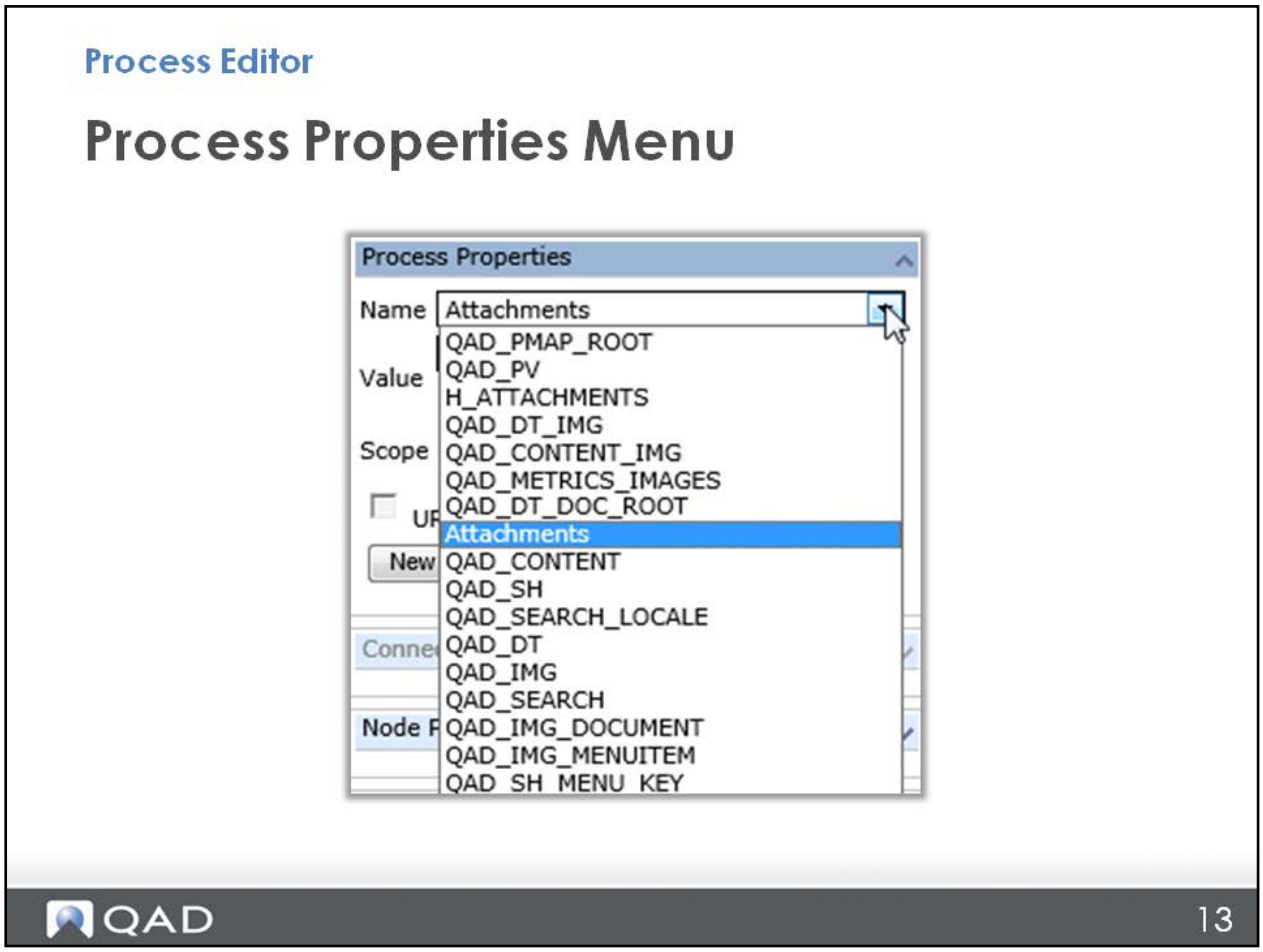
While the range of options is impressive, you are encouraged to stay within the predefined styles. These styles have evolved over the years to provide consistency across maps, differentiation between maps, and alignment with the global SCOR process model.

Here is a brief reference to the configurable style property fields:

- Style ID: This is the ID of the style.
- Font: The font family associated with labels using this style.
- Font Style: The font style (normal or italic).
- Font Size: The font size (from 7 to 36 points).
- Font Weight: The font weight (lighter, normal, bold, or bolder).
- Text Color: The color of the text.

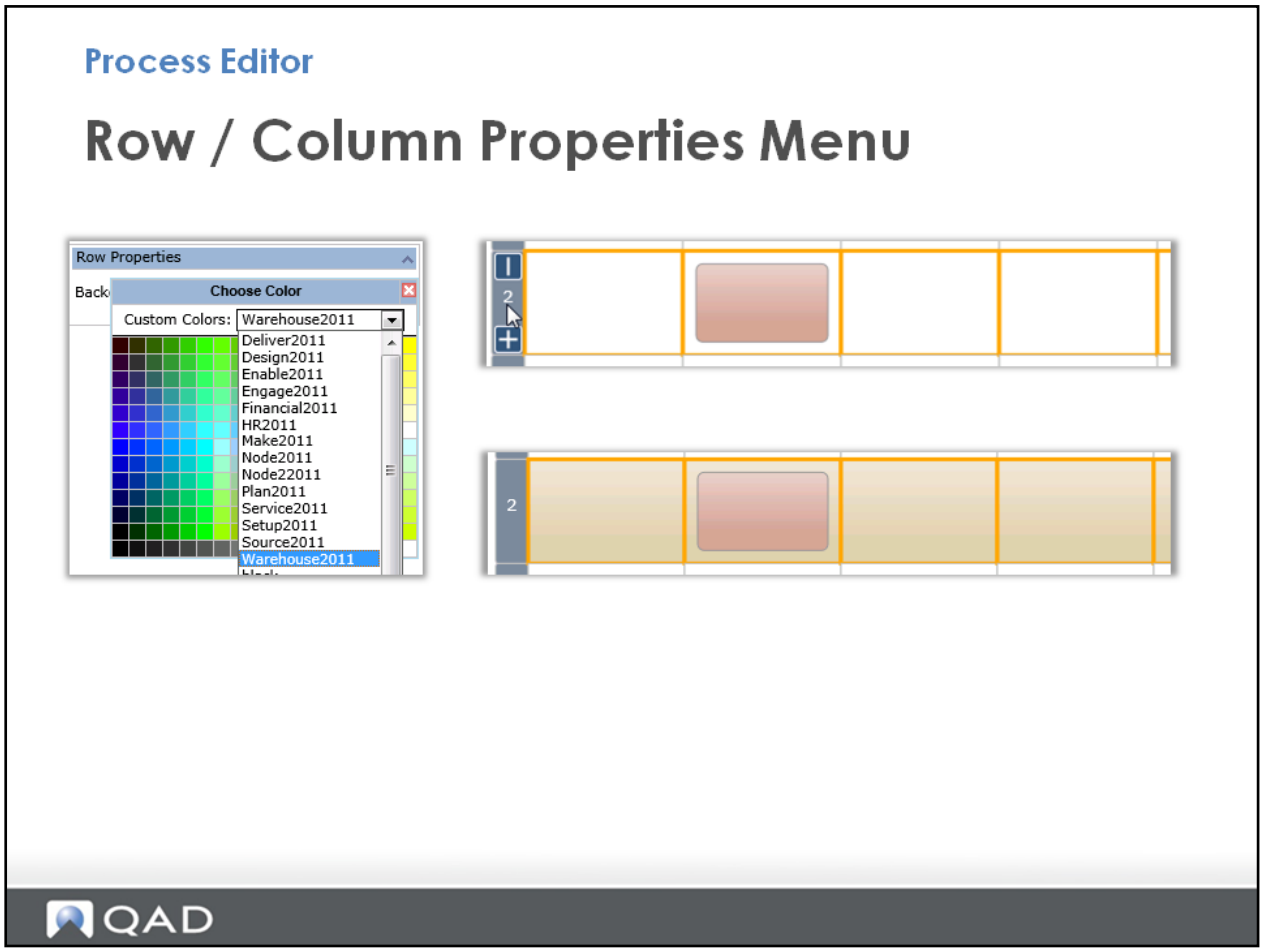
- Stroke Color: The stroke color to apply to lines.
- Fill Color: The fill color for the node.
- Opacity: A value for opacity. “1” represents a solid label. Decreasing values represent increasing transparency.
- Stroke Width: Choose a value for stroke width, measured in pixels. A higher value represents a wider line.

Process Properties Menu



Process Properties in the Editor has the same fields as the Process Properties screen in Process Admin, but since it is here within the Editor, it may be more convenient if you want to see which tokens you have set up already. You only see them listed here; you still have to open Process Admin to create new tokens or to see how the existing ones are configured.

Row / Column Properties Menu

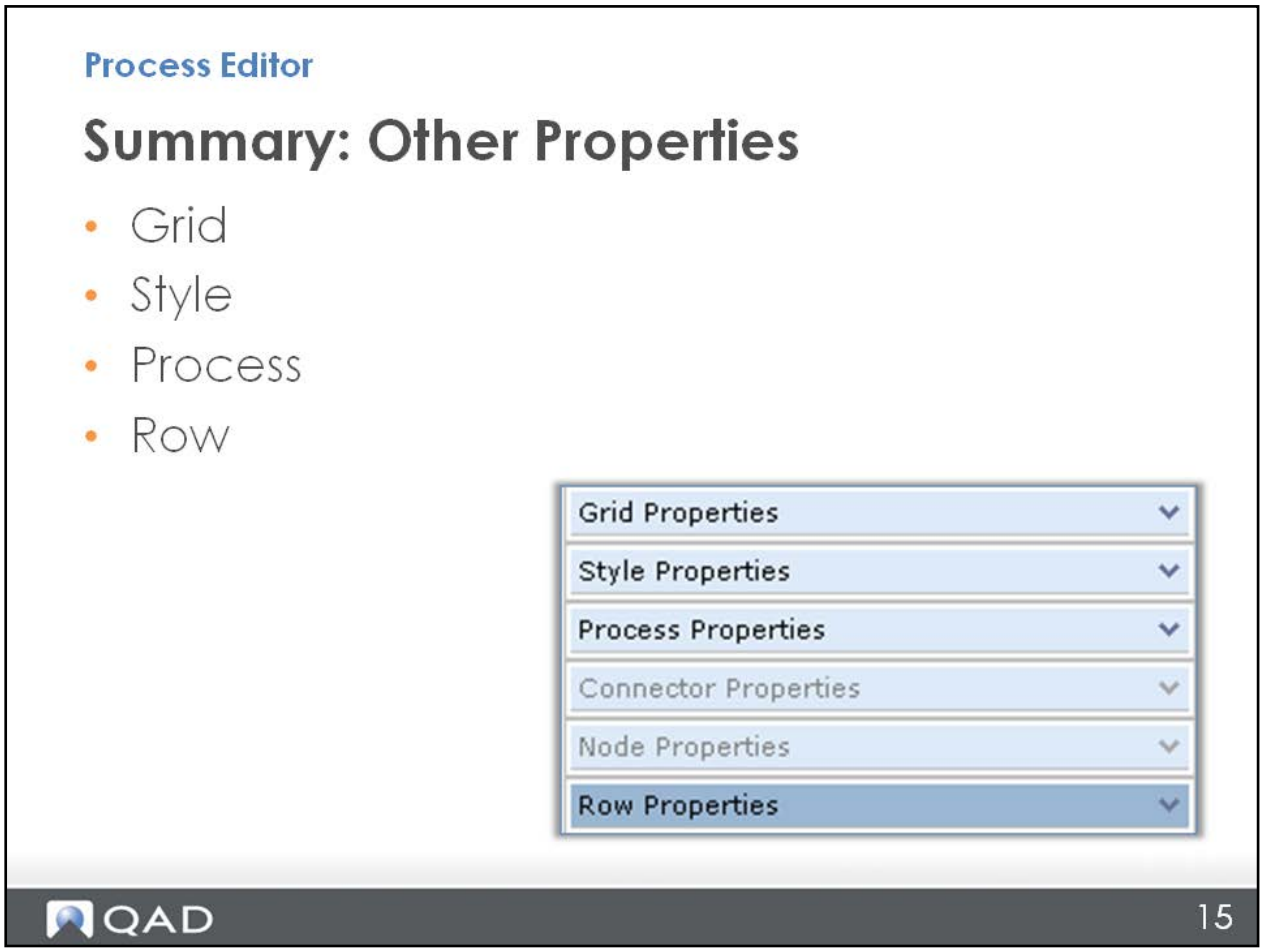


Use Row or Column Properties to specify the background color of an entire row or column.

When you click a row or column, the Properties box opens, where you can select a color from the palette or choose a predefined color.

In this example, select Warehouse2011 and see the changes in the Process Editor.

Summary: Other Properties



As mentioned earlier, you will probably use the Node and Connector Properties the most, but this section gave you a brief overview of the other properties for tailoring the grid, style, processes, rows, and columns.

CHAPTER 7

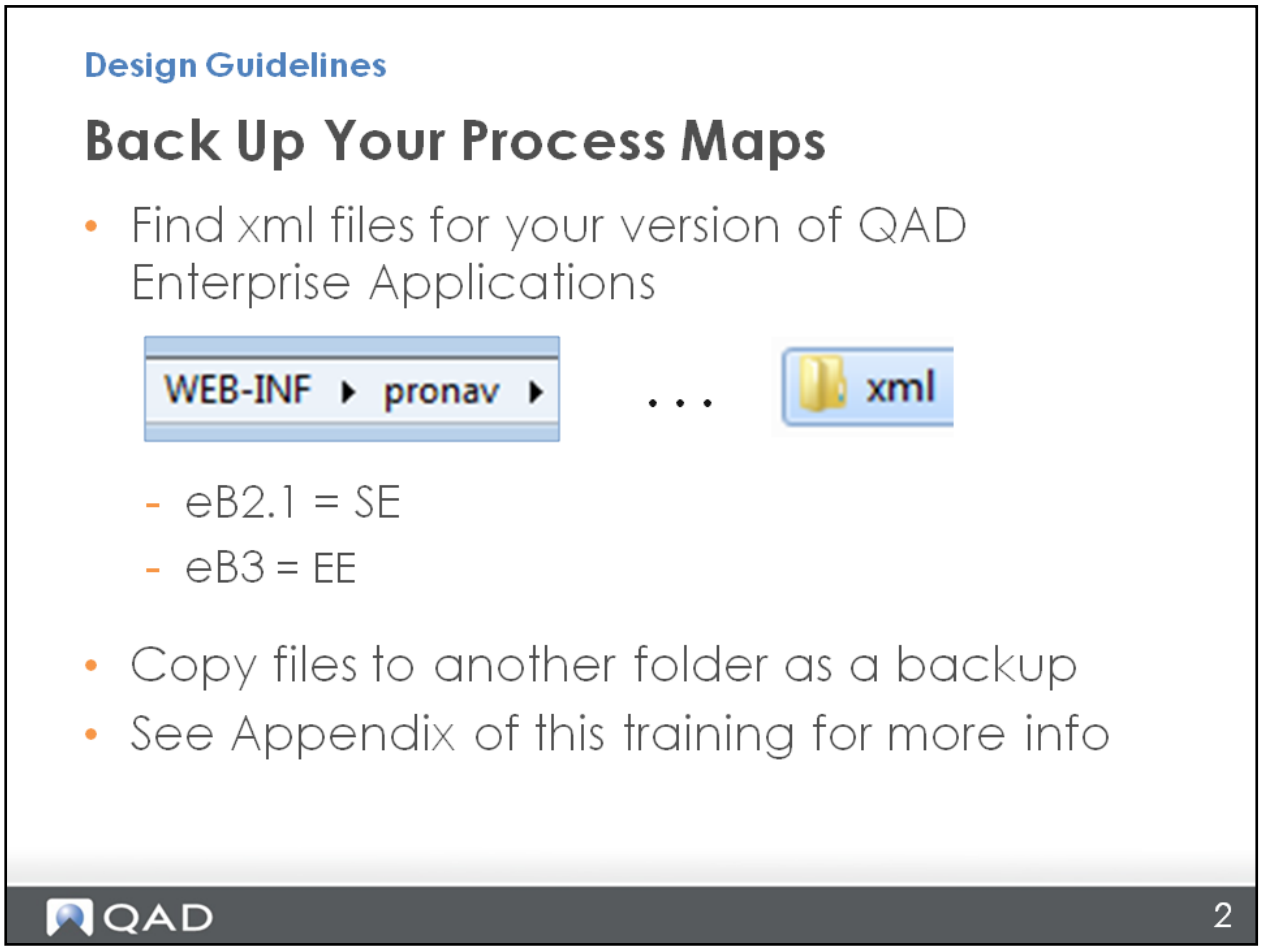
Design Guidelines

This section gives you some guidelines and tips for designing and using process maps.

To watch a video of this section, go to the Learning Center (http://learning.qad.com) and use the Smart Search tab to search the key words “Process Editor.” Take the seventh section (7 of 9) called “Design Guidelines,” Course # OLT-006890.

Or, if you are already logged into the Learning Center, just click here:
https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?selectTab=OLT+Activities

Back Up Your Process Maps

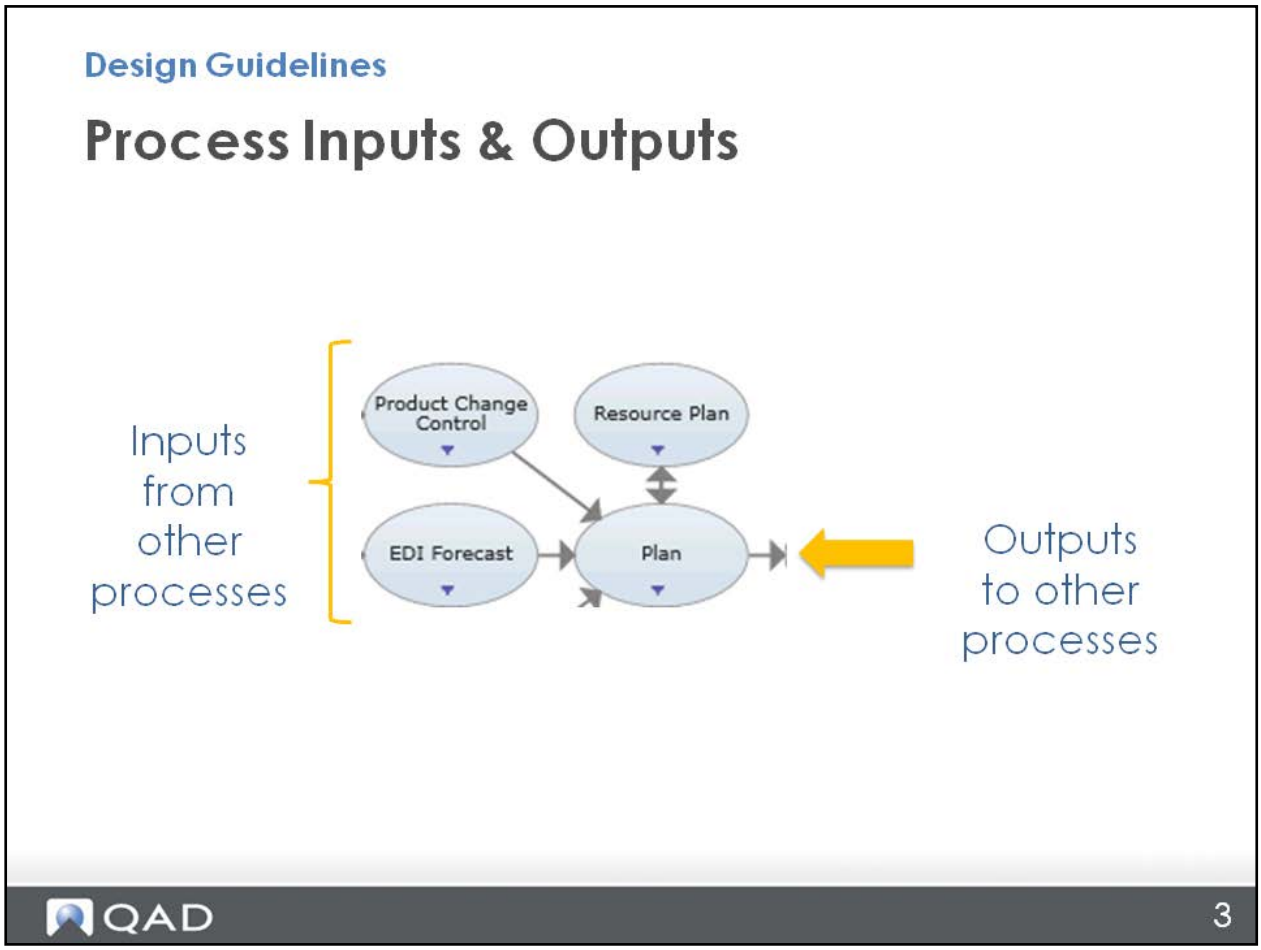


The first tip is to back up your process map files periodically so that if you make changes and then want to go back, you can. Basically, the process maps are stored as xml files. Follow the path to a directory called "WEB-INF" then "pronav" until you see the xml directory for your version of QAD Enterprise Applications. When you see eB2.1, it is for the Standard Edition; eB3 is for Enterprise Edition. Copy the files to another folder as a backup.

Sometimes, though, it is difficult to find the directory—for example, in an On Demand environment—so you should work with your QAD team to get the files and do the backup.

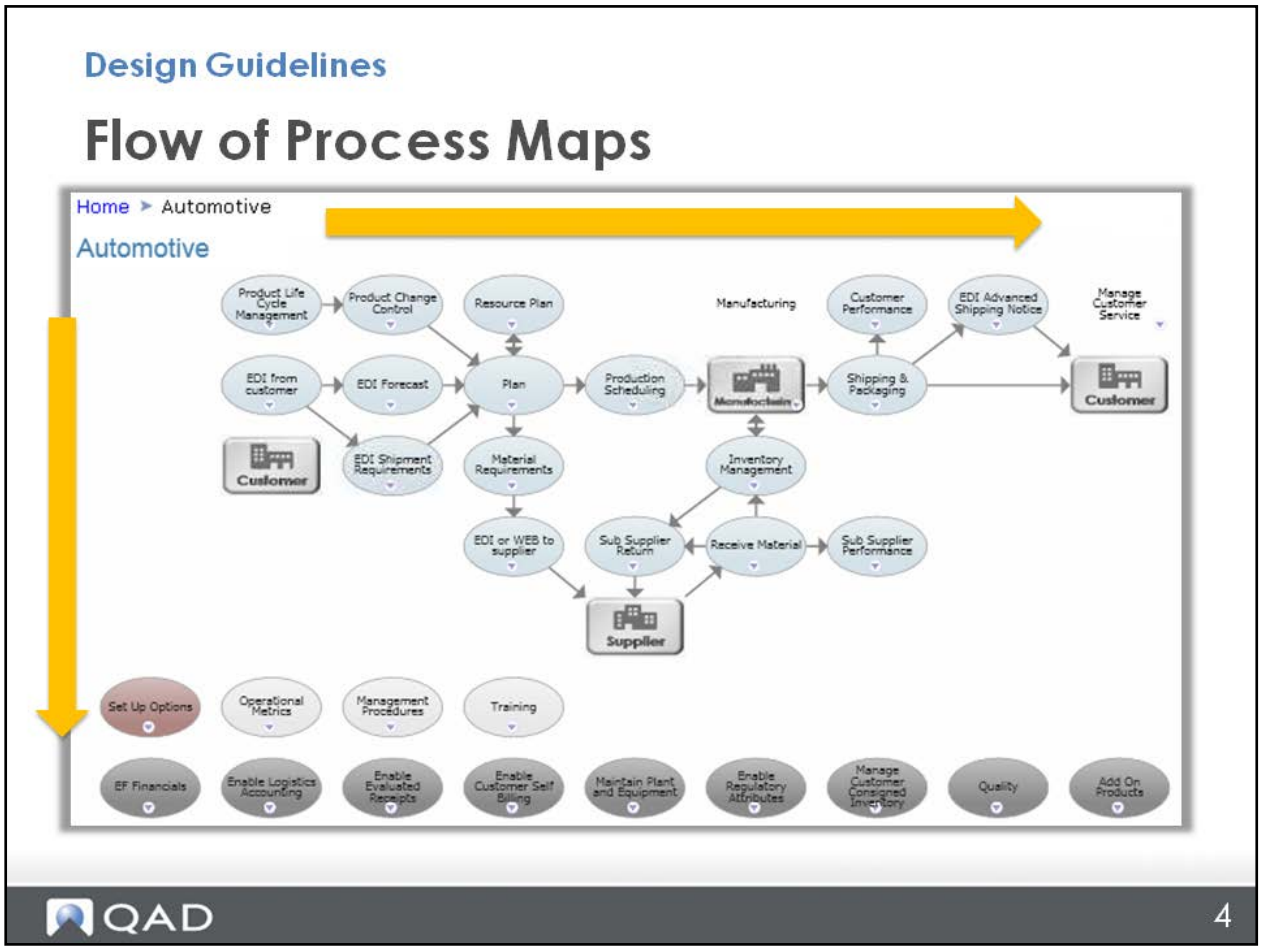
Reference the appendix of this training for information on how to do this.

Process Inputs & Outputs



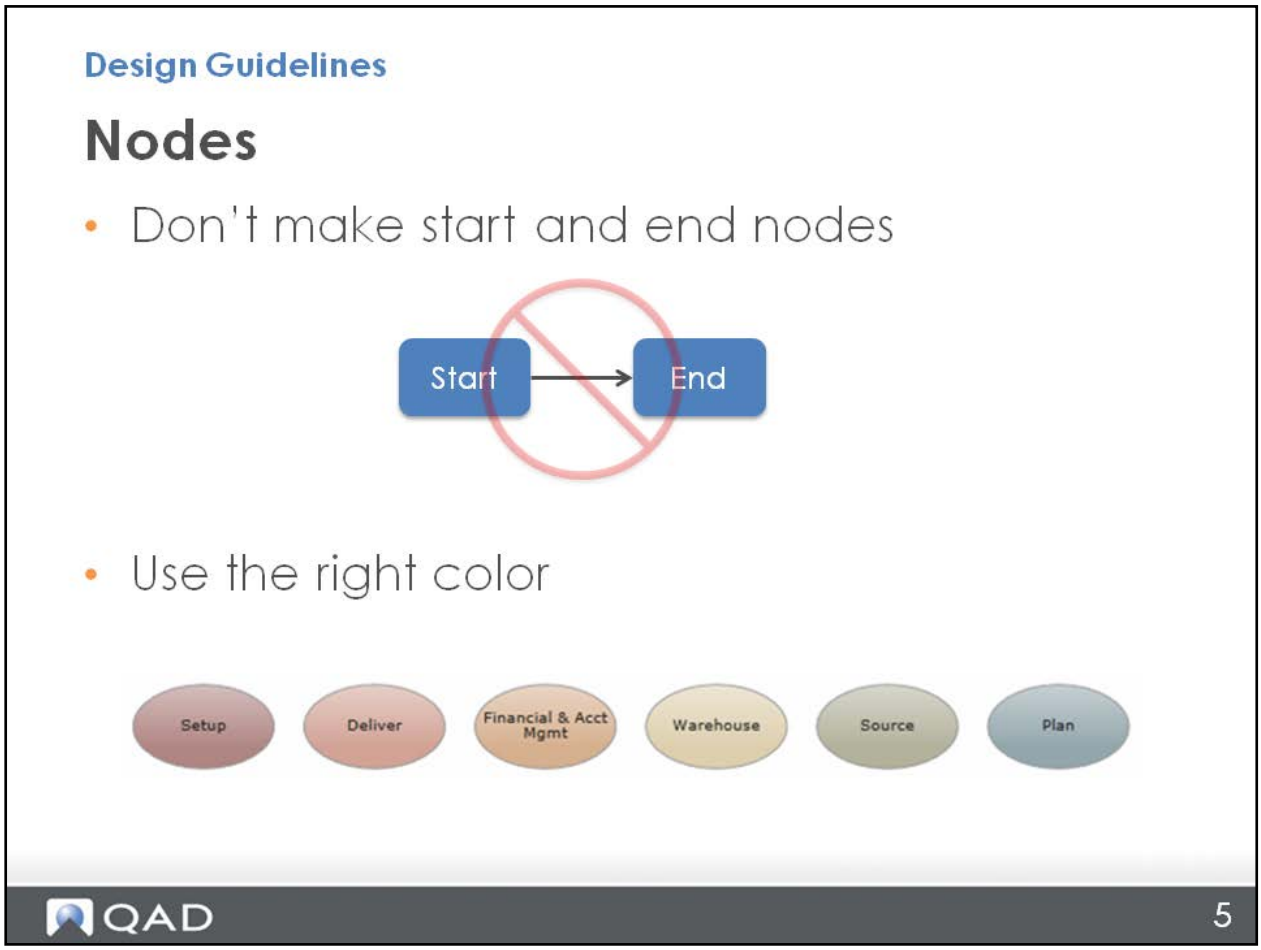
As you know, viewing a process map easily illustrates the dependencies of input and output processes.

Flow of Process Maps



The generic flow of process maps is from left to right and from top to bottom. Most people think in these terms and it is easier to understand the flow.

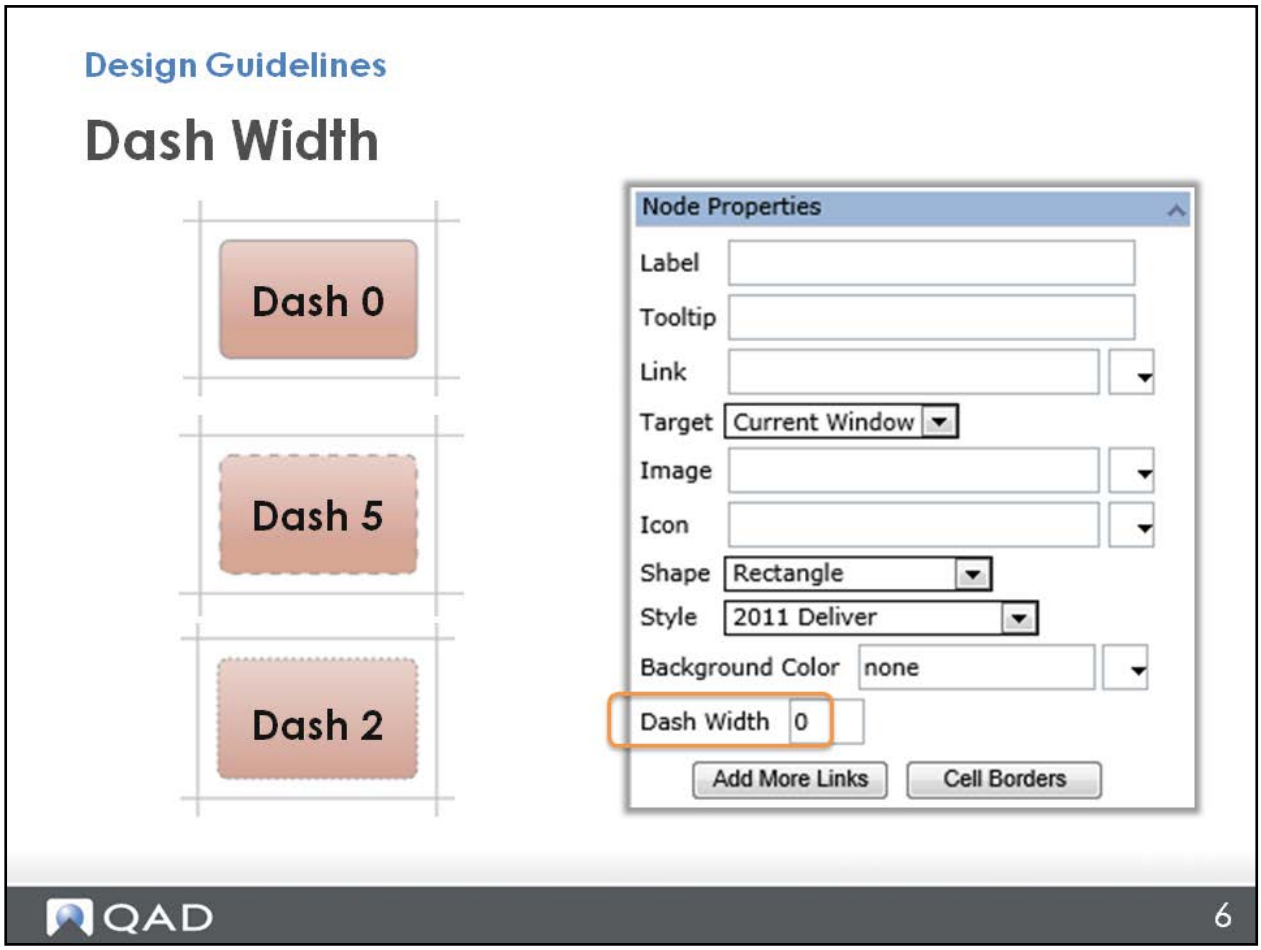
Nodes



There are a couple of guidelines for nodes.

1. Do not make a start and an end node—this is unnecessary.
2. Be sure to use the right colors for the process you are showing, whether it is a setup, deliver, or financial process, or one about warehousing, service, planning, and so on. The colors are an important way to convey meaning quickly and to keep the maps consistent.

Dash Width

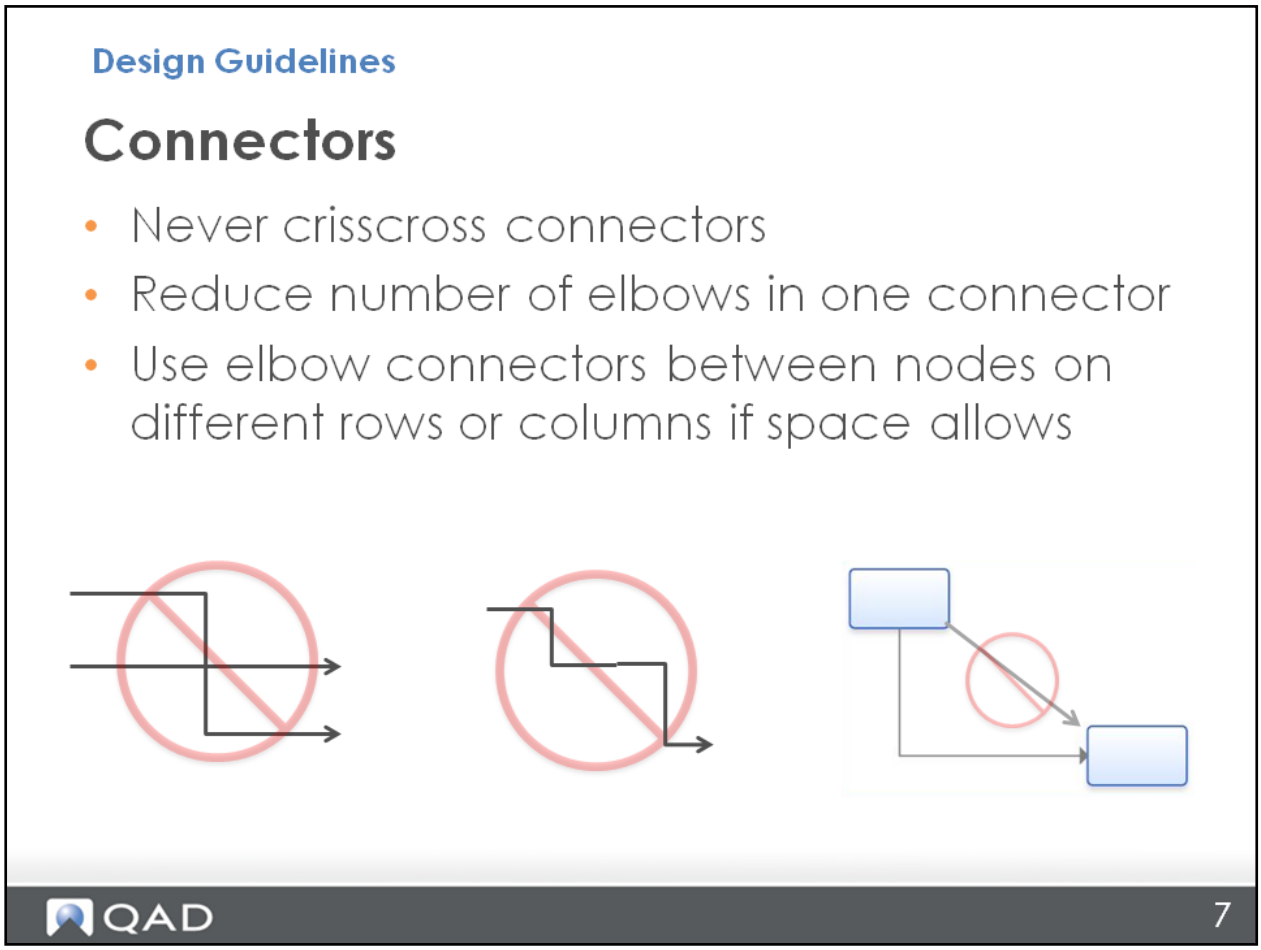


Remember, in Node Properties you can change the node border from a solid line to a dashed line. This can be an important part of your design. QAD uses a dashed border with a width of 5 to show a step is OPTIONAL. Other dash widths can refer to other meanings, perhaps an internal step you do at your company, such as having to get authorization before continuing. This dash style would give that indication without having to spell it out in words.

- The default dash width is 0
- Dash width 5 is an optional step
- Dash width 2 is another QAD standard used as a placeholder node that does not link to anything.

Instead, the node points you where you go; for example, an add-on product you do not have.

Connectors

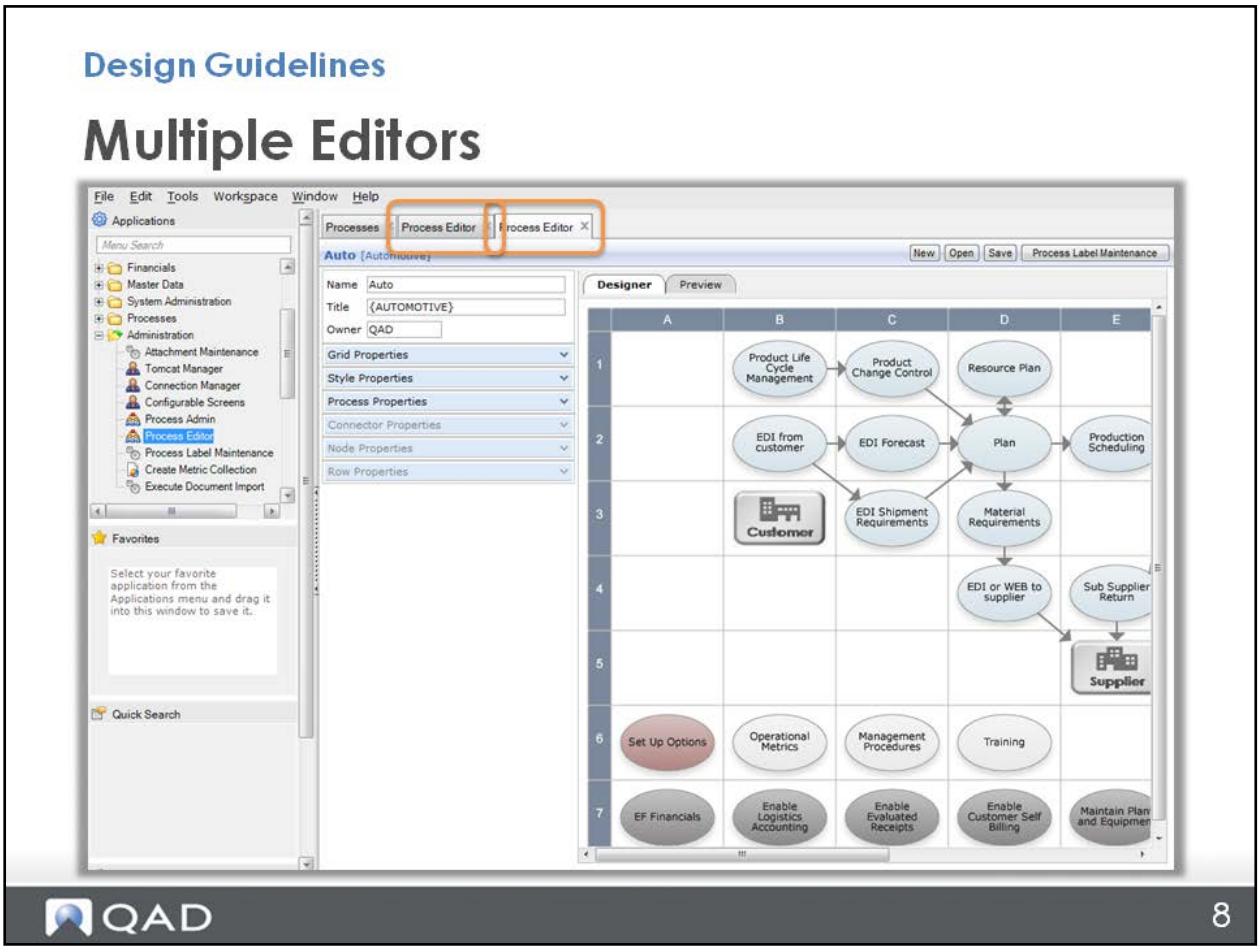


There are also basic guidelines for connectors:

- Never crisscross connectors
- Minimize the number of bends, or elbows, on the connector
- Use elbow connectors between nodes on different rows or columns if space allows versus a direct, diagonal connector between the two.

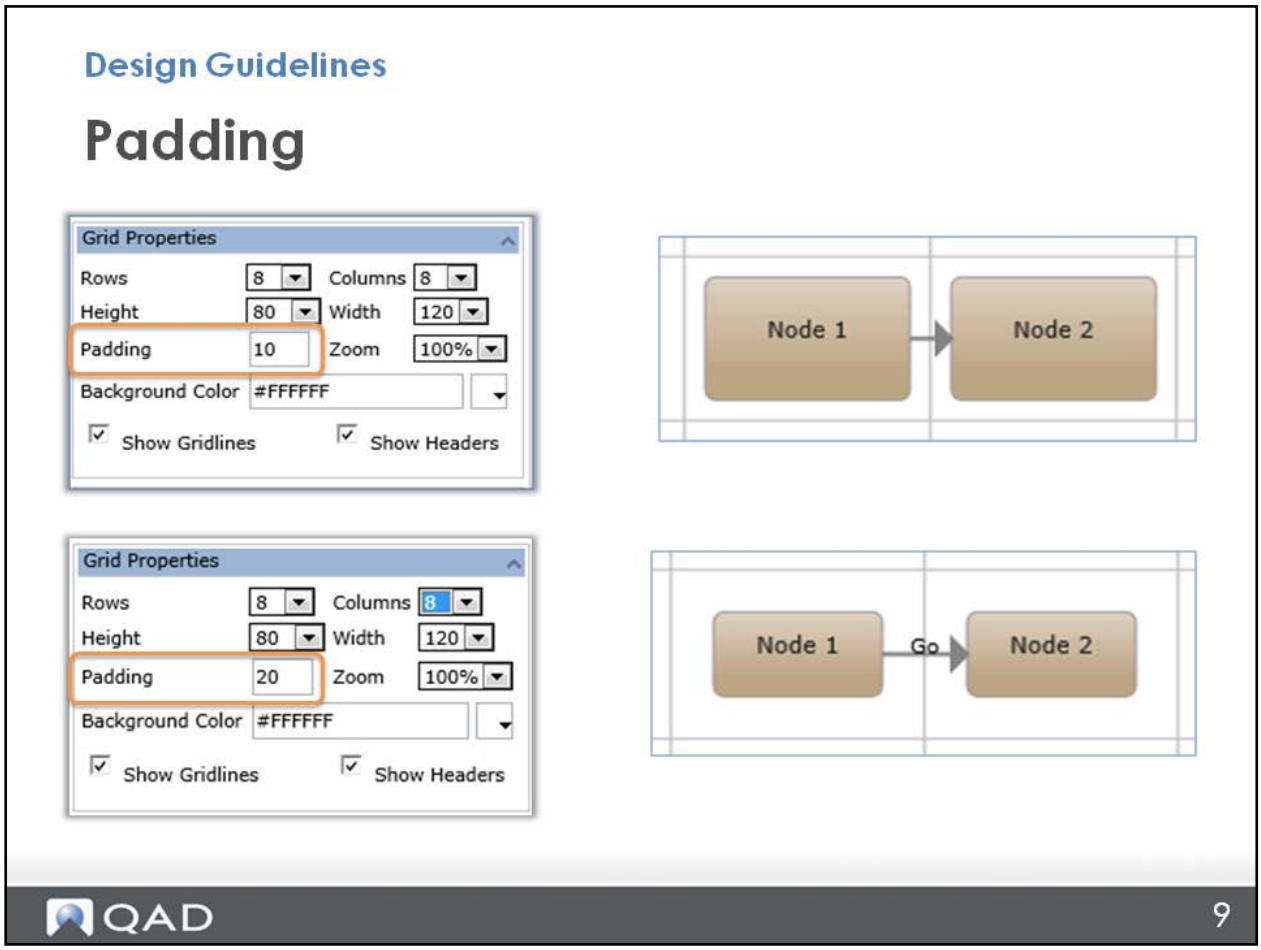
(Although sometimes, you do have to use a diagonal connector due to space constraints.)

Multiple Editors



As you design or edit more and more maps, you will find it is often helpful to have more than one map open at a time. To do this, just open the Editor again from the left menu and toggle between the tabs. This is also an example of having to use diagonal connectors because there just is no more room to have the elbows (unless you made the grid much larger with extra rows and columns).

Padding

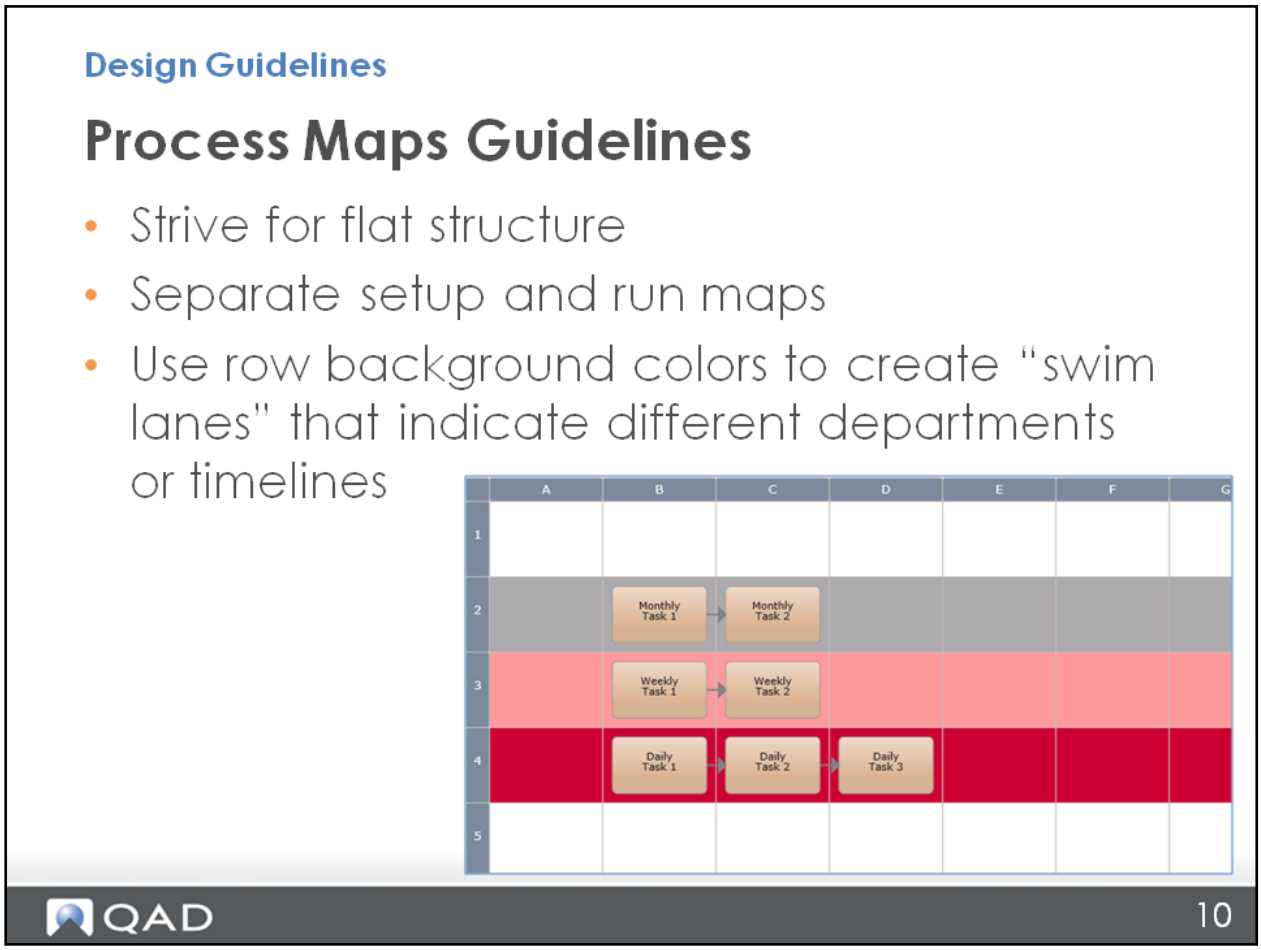


Remember, you can change the padding in Grid Properties. (This is the space between the node and the grid lines.)

One reason for doing this is to allow more room for a connector. For example, perhaps you want to add a label to the connector, but there is no room between the nodes unless you change the padding.

However, note that when you change the padding of a cell, you are changing it in Grid Properties, so it affects all the cells in the whole grid.

Process Maps Guidelines



Here are some other design guidelines.

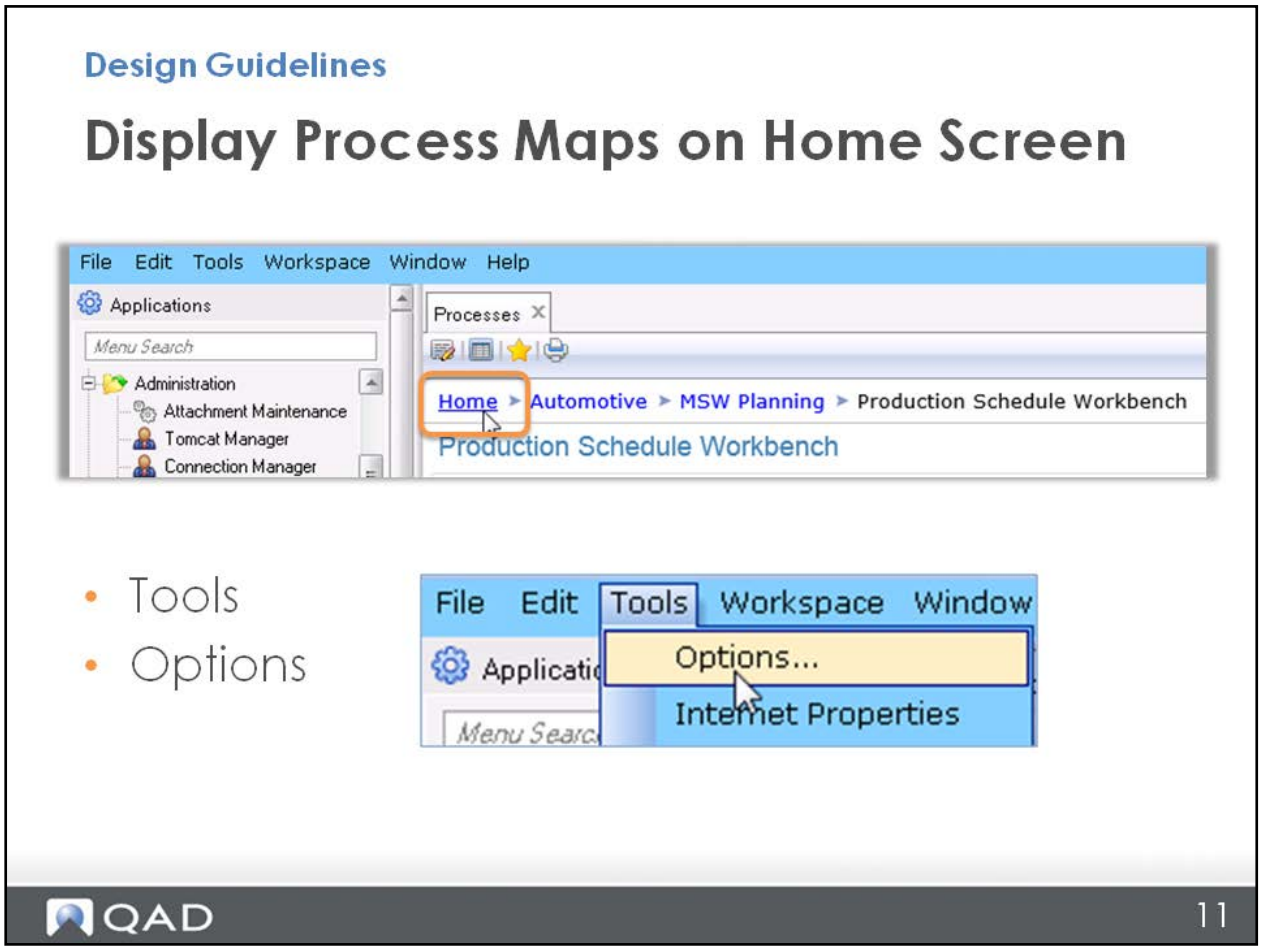
- Strive to have a flat structure: remove layers of drilldowns so you do not get lost in the maze. Footers help you with this. Rather than drilling down to get to something, you can put that option in the footer.
- Setup refers to a one-time event like configuring a new system, which is separate from run activities that occur daily. Do not clutter a map with something you did a long time ago and will not have to do again, so keep your setup

and run maps separate.

- If you are showing tasks for different departments on the same map, you can change the row color to create a “swim lane” that distinguishes it as something apart from the rest of the nodes. You also might create swim lanes to

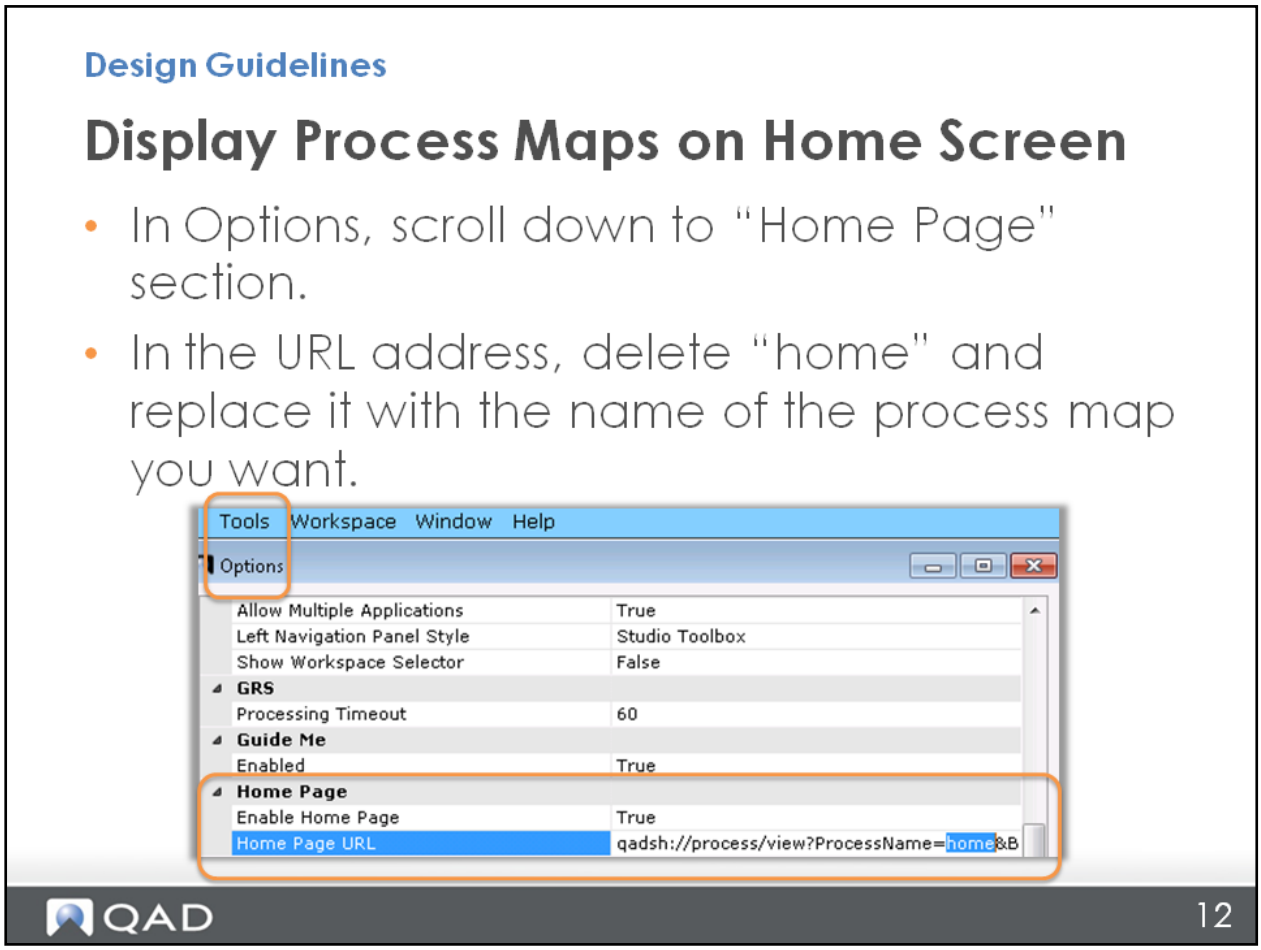
differentiate weekly and daily tasks.

Display Process Maps on Home Screen



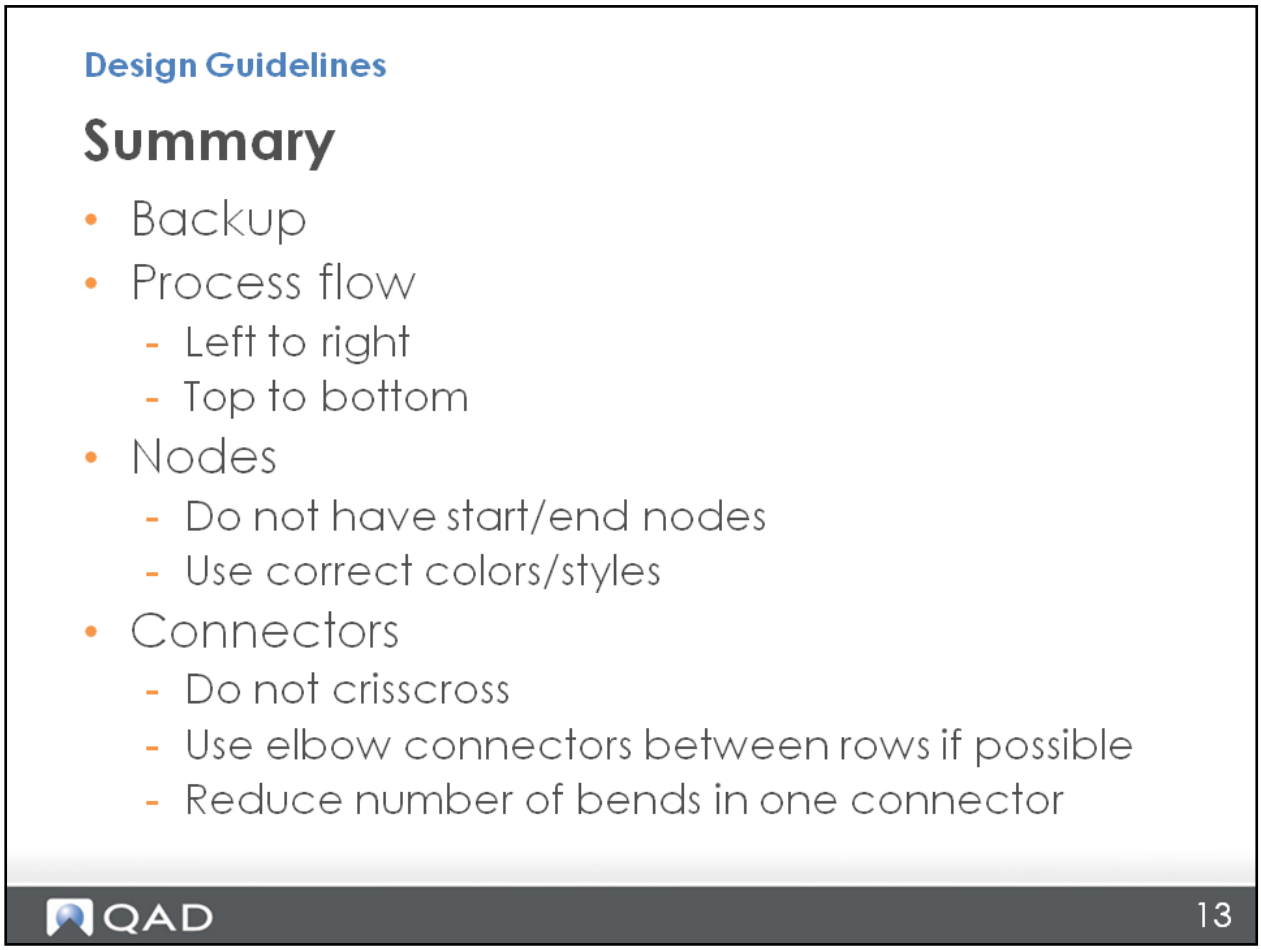
Finally, you may want to make the process maps appear as your home screen. To do that, open Tools and Options.

Display Process Maps on Home Screen



Then, scroll down to the Home Page section. Set the Home Page URL by deleting “home” in the text and replacing it with the name of the process map you want.

Summary

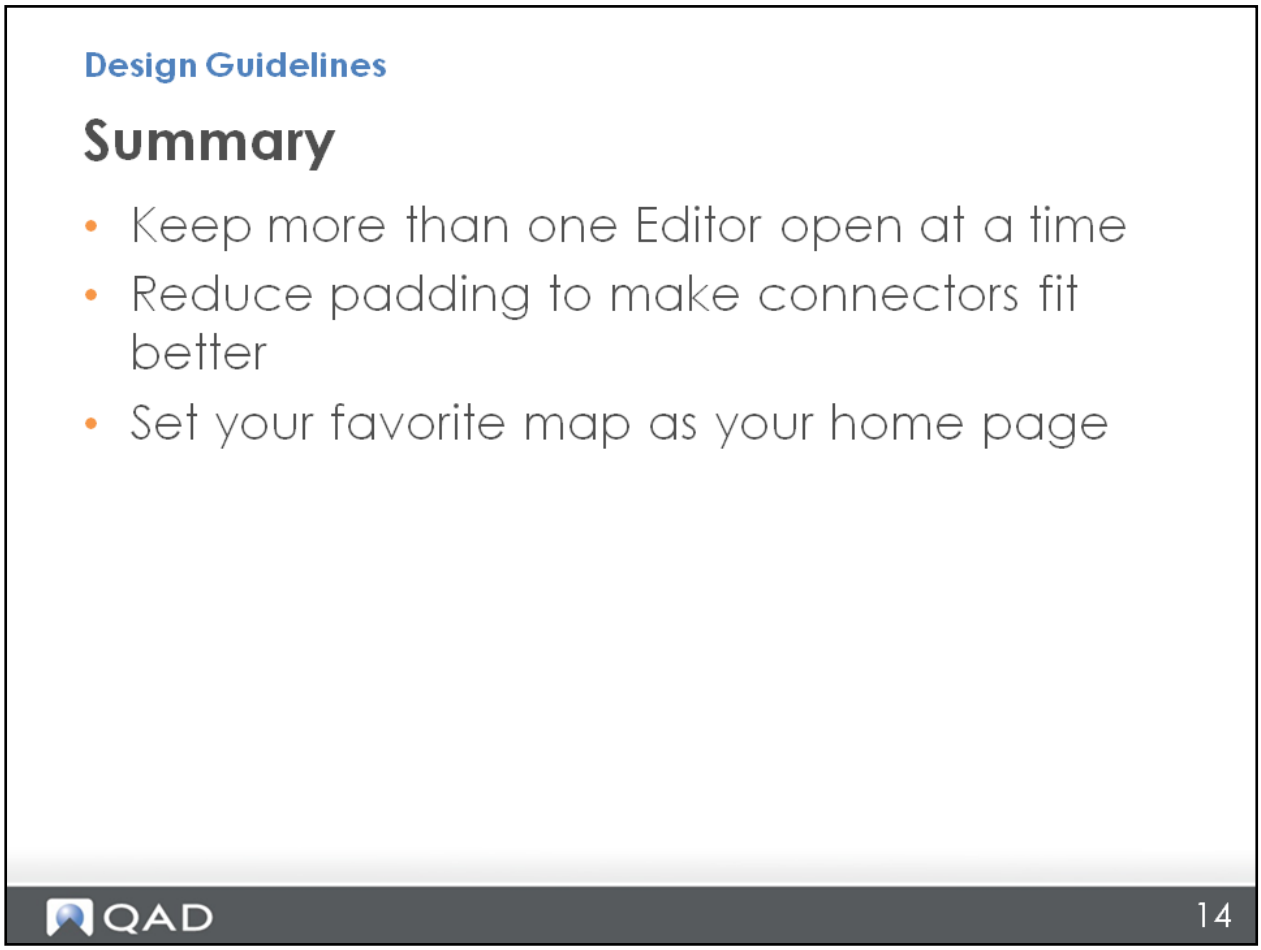


To summarize:

- You should do periodic backups of your process maps, especially before making a major change.
- Process flows go from left to right and top to bottom.
- You should NOT include a start or end node, and you SHOULD use the correct colors and styles to match the process.
- Connectors should never crisscross; use elbow connectors between rows when possible, instead of a straight diagonal line,

and try to keep it to just one bend in the elbow.

Summary

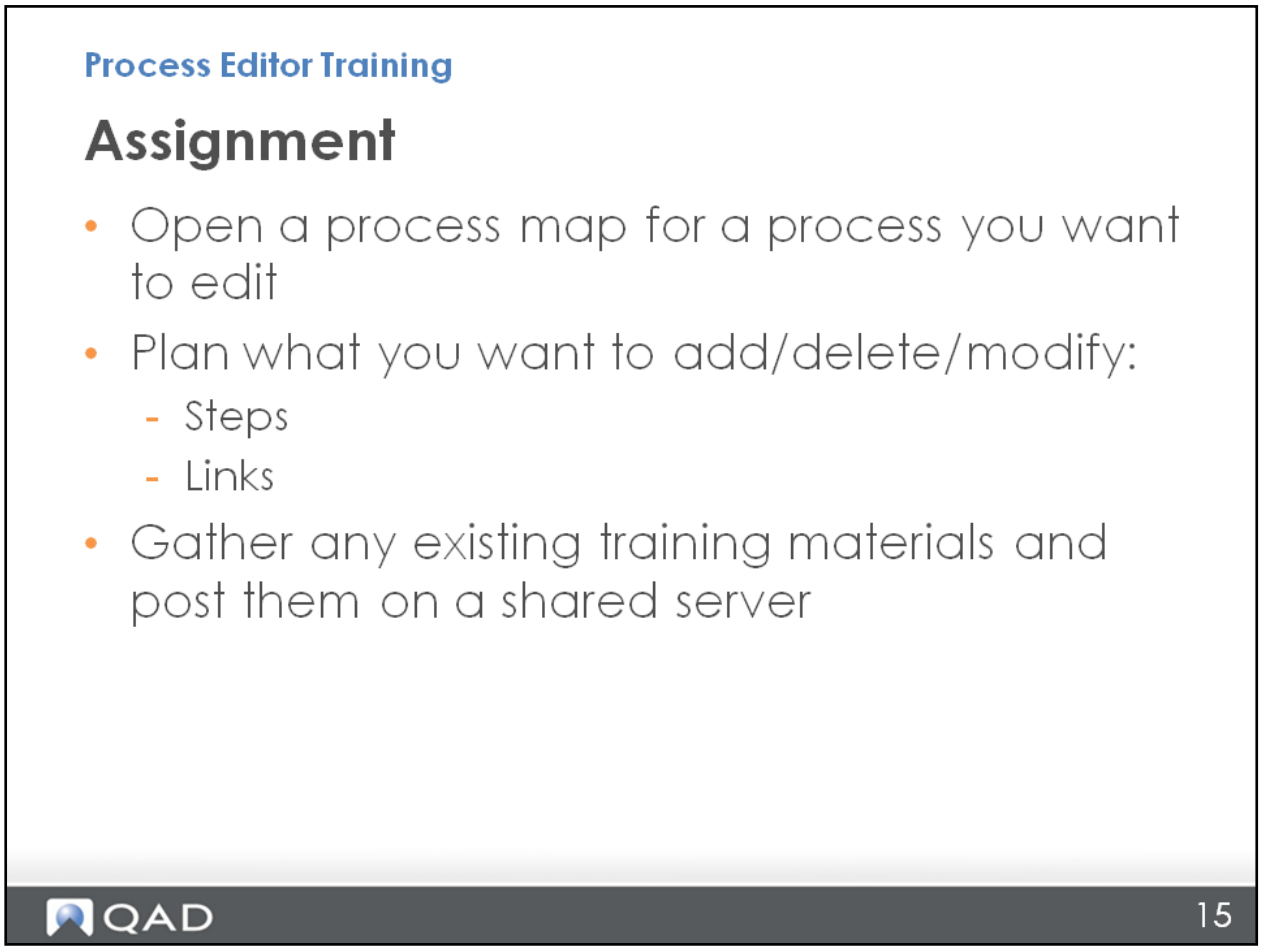


It often helps to keep more than one Editor open at a time.

If you are going to add a label to a connector, or you just want to see it better, you can reduce the grid boarder padding.

You also learned how to set your favorite map as your home page.

Assignment



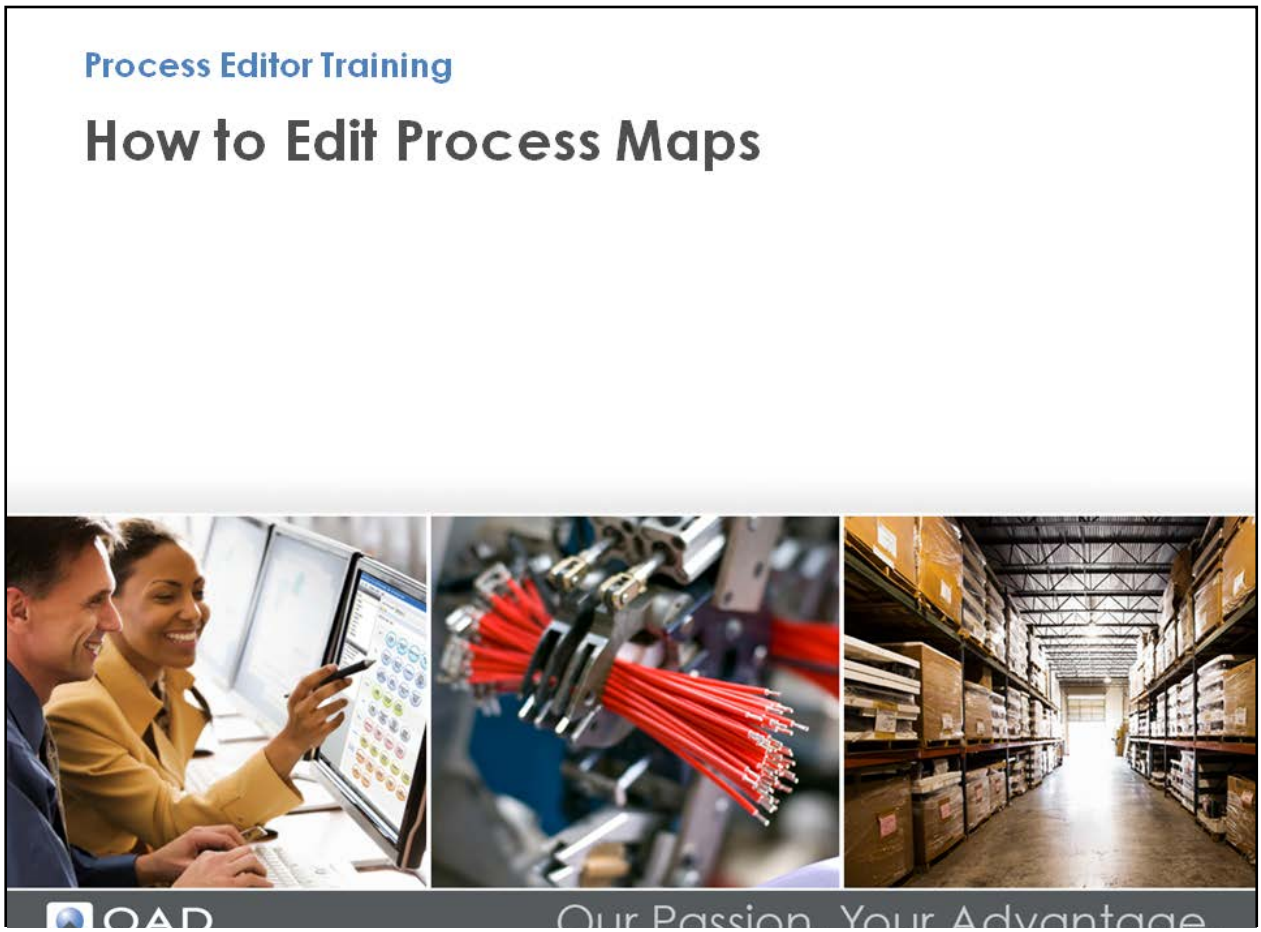
This assignment prepares you for the next section of training, where everything comes together to edit one of your own process maps.

- Look around to find a map for a process you want to edit.
- Consider using one that you would like to add some extra steps or links to, to match up better with how your company does things.
- Then gather any existing training materials or other information you want to link to, and put those files on a share server.

In the next section, you will use this process map to do the exercises.

CHAPTER 8

How to Edit Process Maps



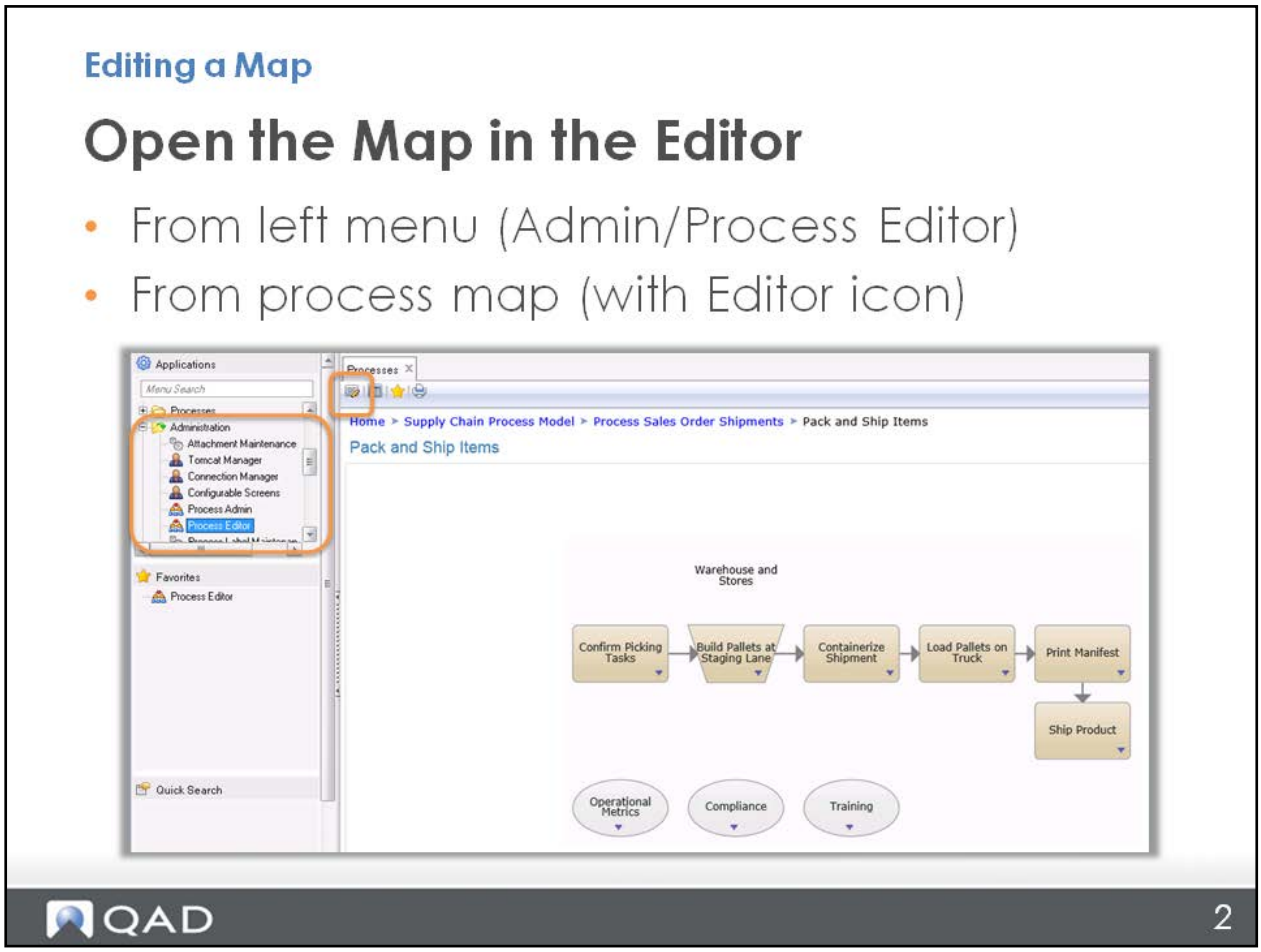
The assignment from the last section was to choose a process map that you would like to edit, and to plan what those changes will be; also, to assemble any existing training materials you can link from the nodes.

In this section, you bring together all of the lessons learned so far by editing your process map and working with the grid, nodes, connectors, and the various options open to you now that you understand the Process Editor.

To watch a video of this section, go to the Learning Center (http://learning.qad.com) and use the Smart Search tab to search the key words “Process Editor.” Take the eighth section (8 of 9) called “How to Edit Process Maps,” Course #OLT-006900.

Or, if you are already logged into the Learning Center, just click here:
https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?selectTab=OLT+Activities

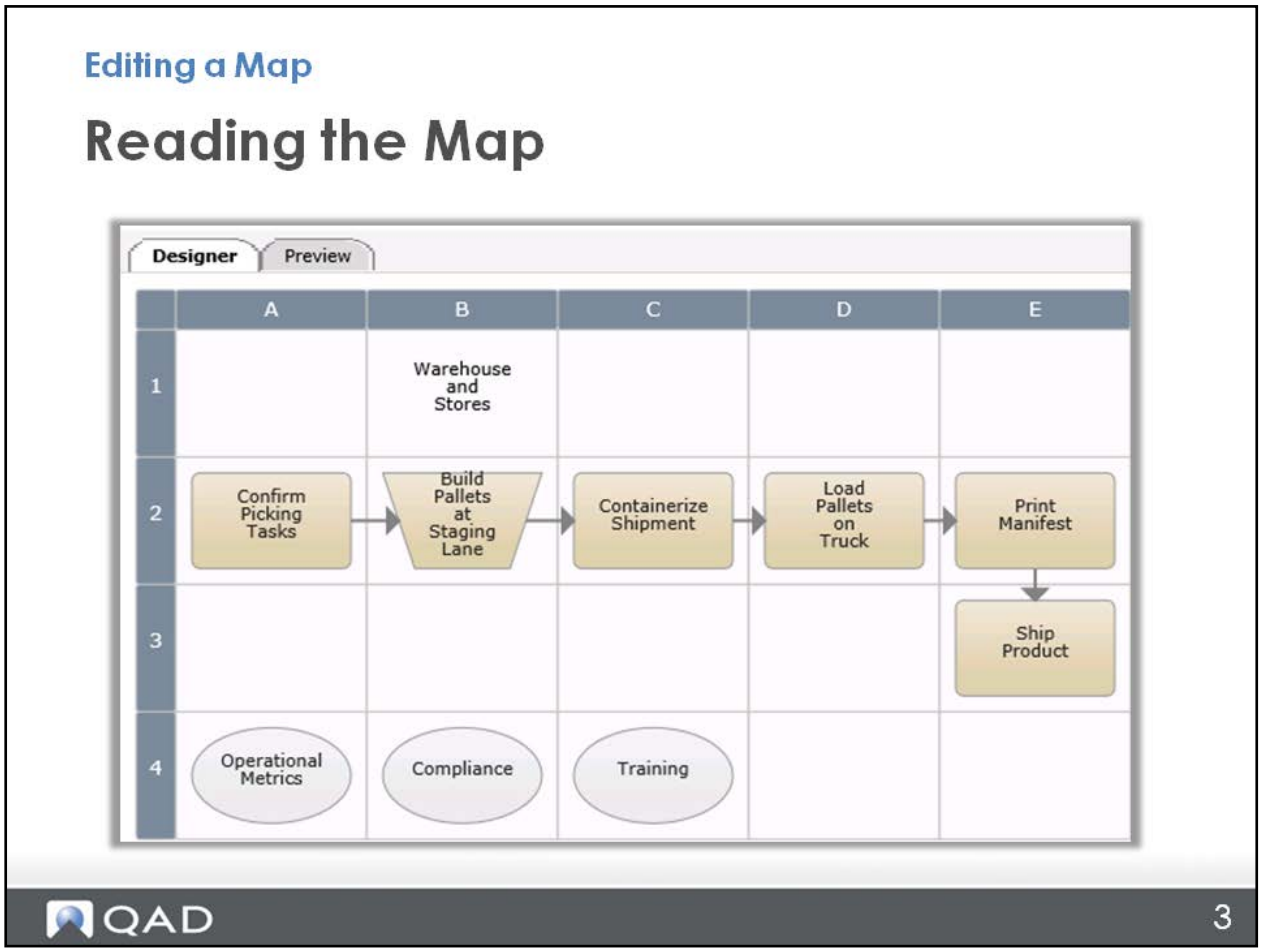
Open the Map in the Editor



There are two ways to open the map in the Editor. Do you remember them?

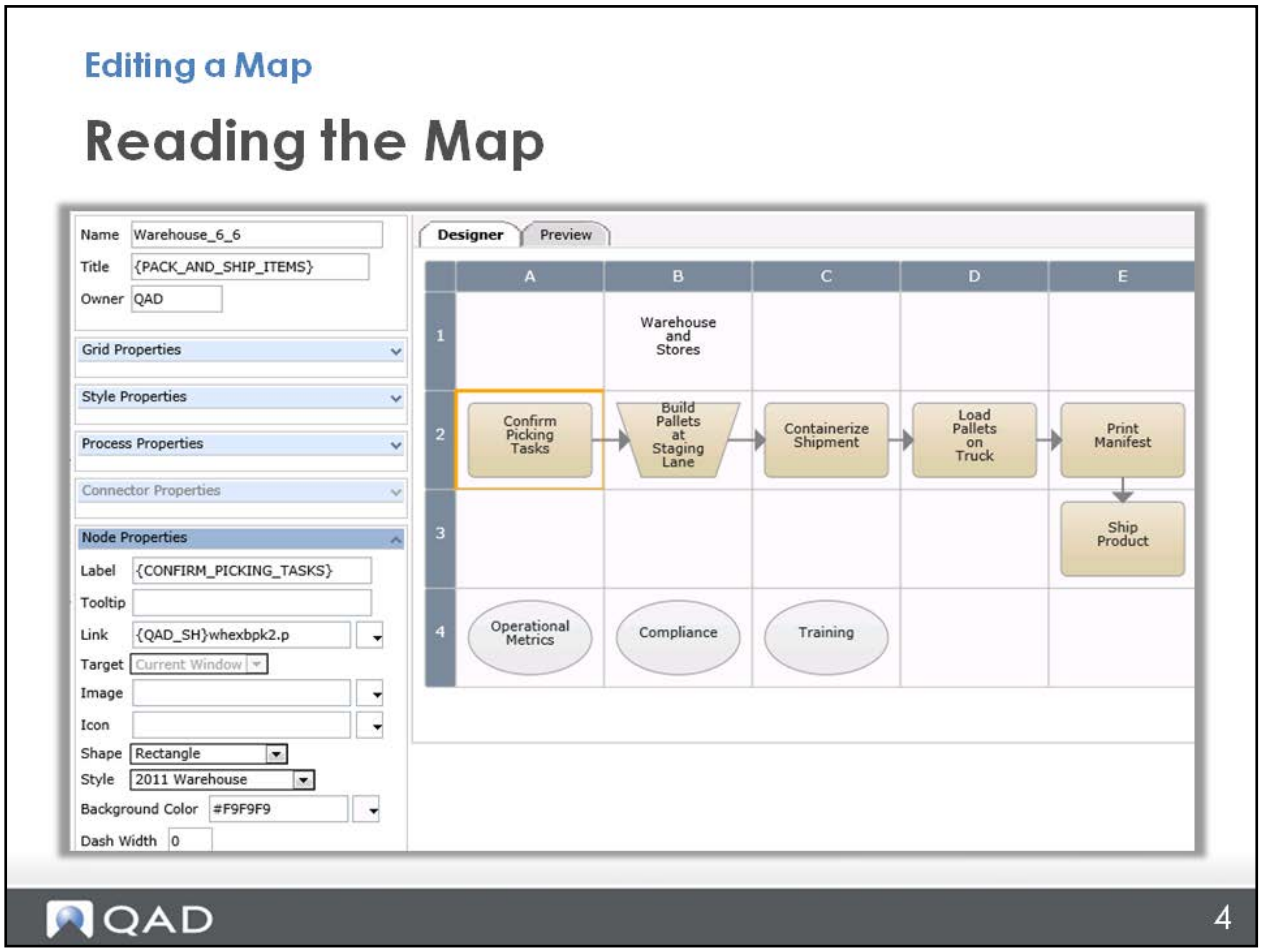
One way is to open the map itself and then click the Editor icon; the other way is to use the menu option under Administration.

Reading the Map



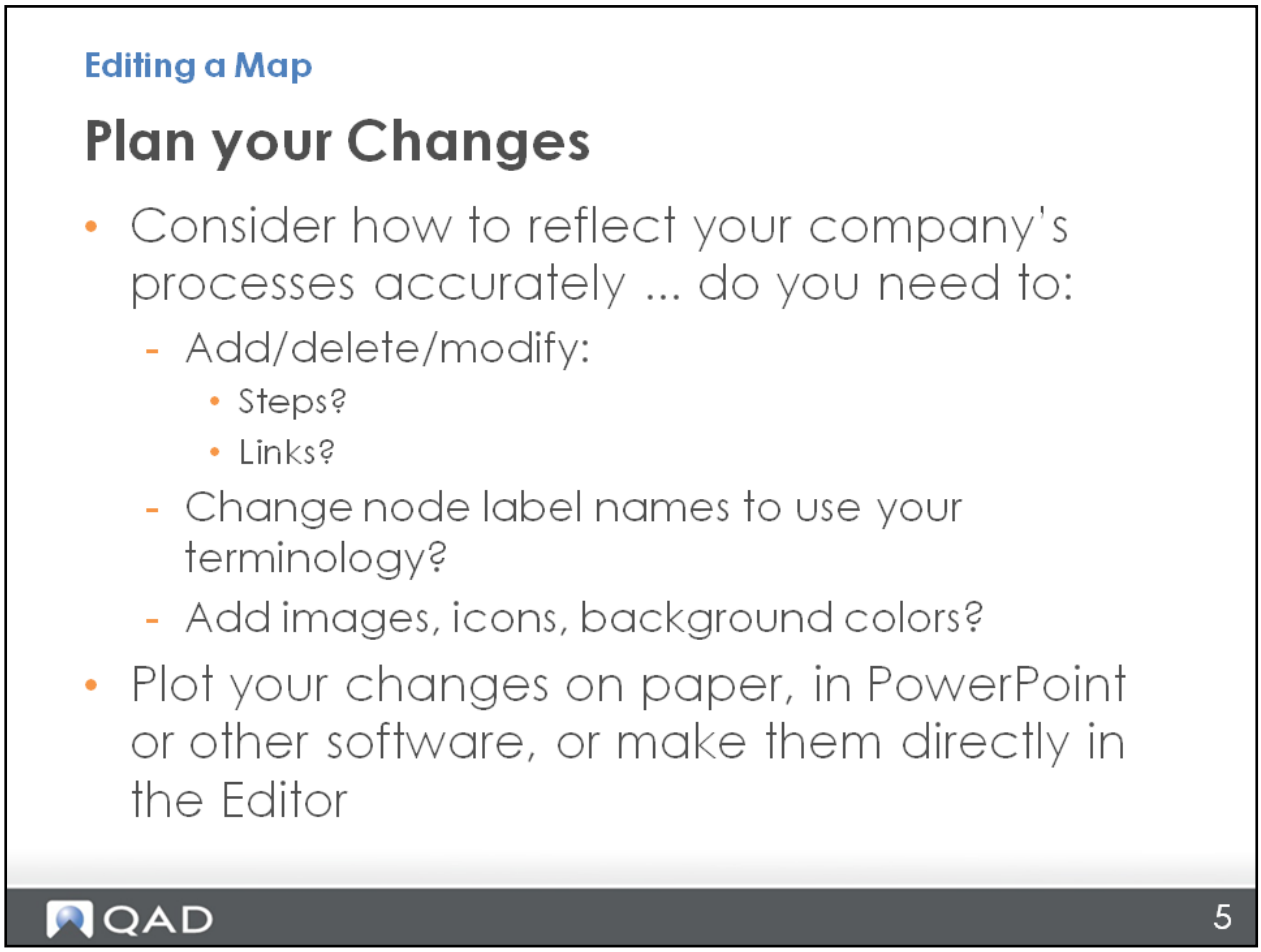
Look around at this map. By now, you can recognize from the shapes that most of these nodes are going to take you to a QAD screen, that the second one is a manual operation, and that the three in the footer link to another process map about those topics. You might even recognize that the color and style is for Warehousing, which you can double-check by clicking on a node to open Node Properties.

Reading the Map



In Node Properties, you can see where the first link goes (to a QAD screen) and when you open the Add Links window, you can check what other links are there. Now you can compare all of this to your own processes and see what kinds of changes you need to make.

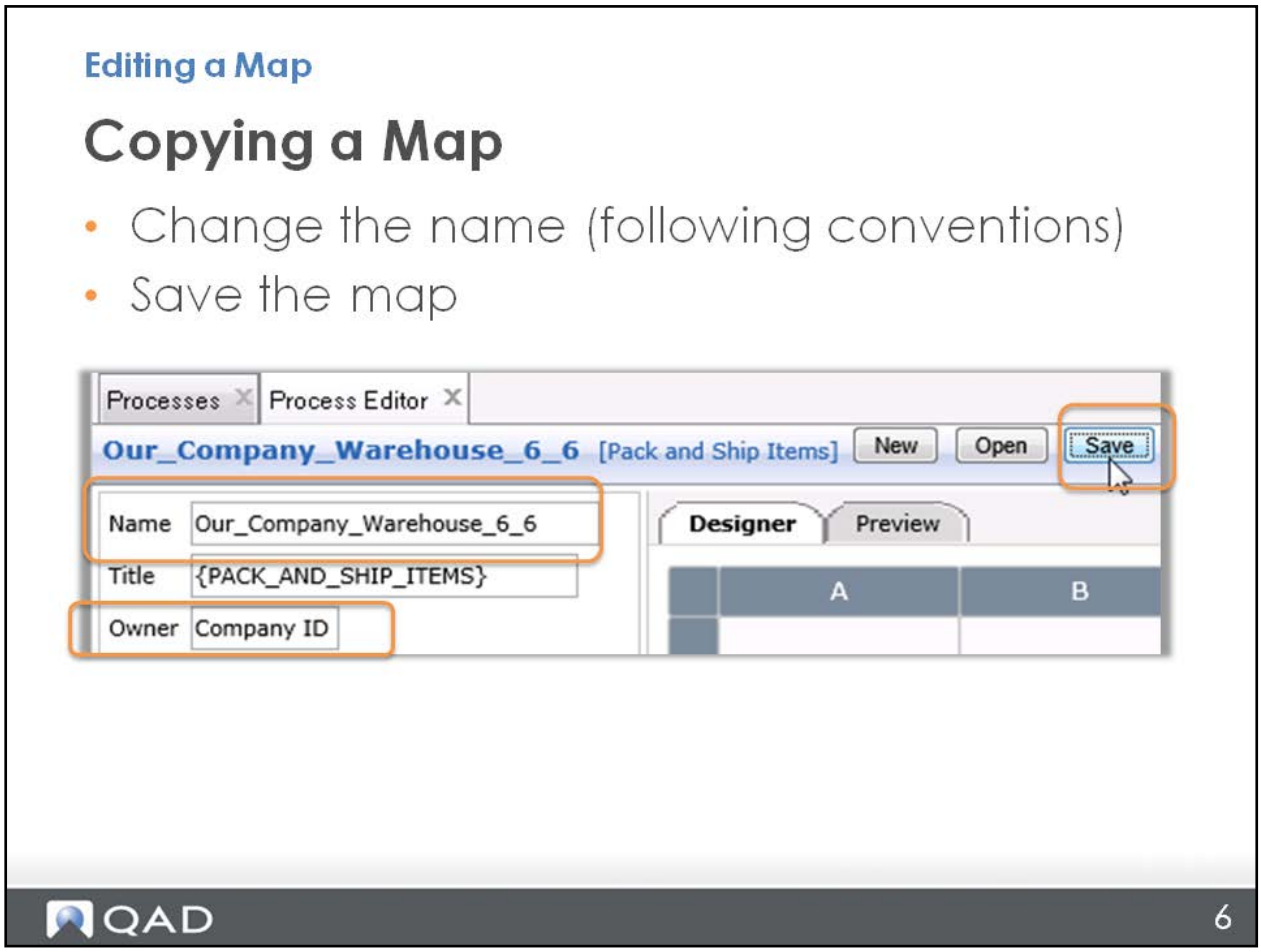
Plan your Changes



Consider: Do you need to add or delete a step, or somehow modify it to match what you do in your company? Or add some more links? Delete or modify them? Maybe you would like to change the node label names to match your own terminology, or add images, icons, or background colors. You now know how to do all this.

Optionally, you might write out your changes on paper first, or design them in PowerPoint or some other software, so you know what you are going to do. Or, you can just make them directly in the Editor.

Copying a Map



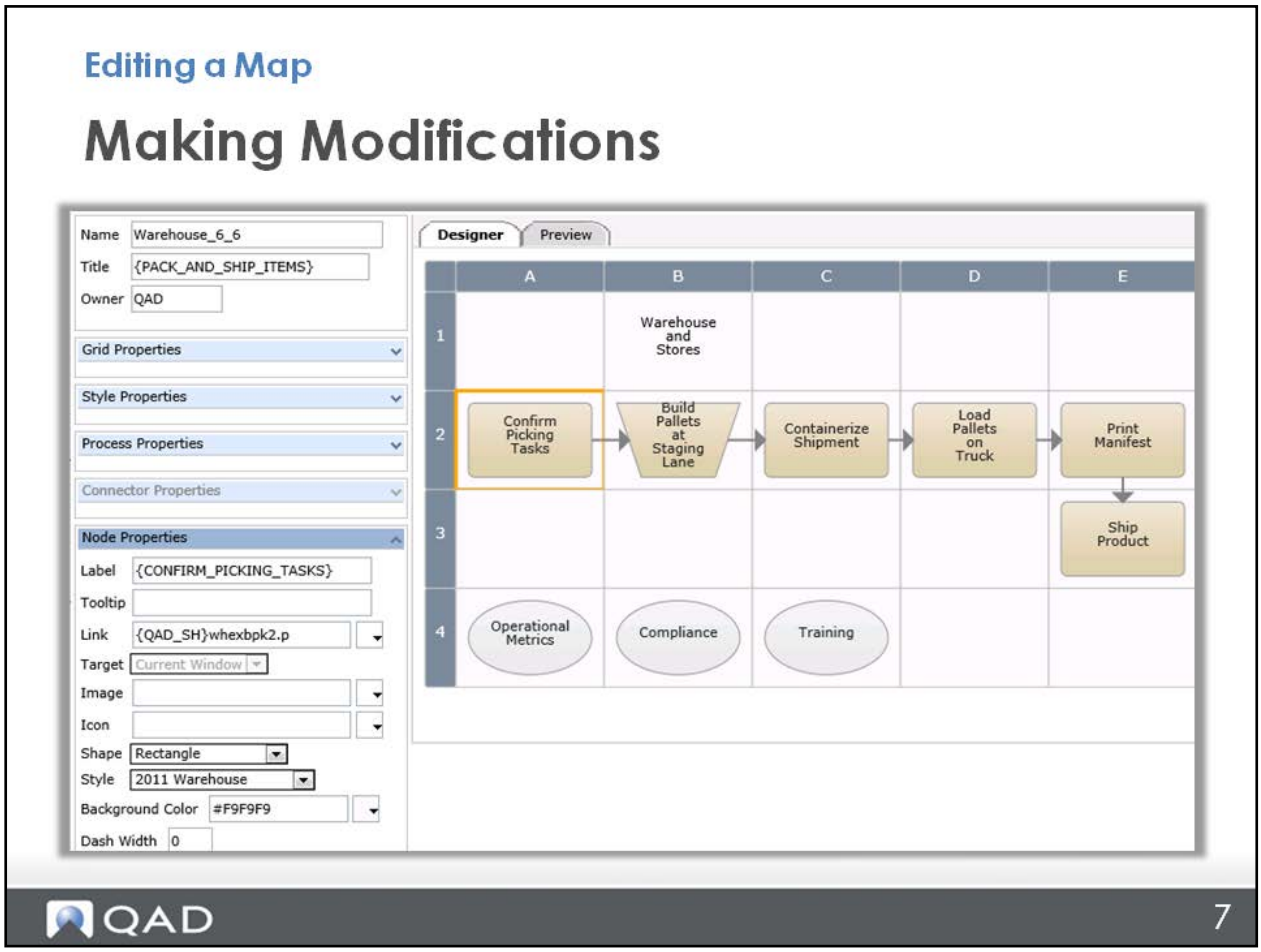
You could just modify this existing, standard QAD process map, or you might want to make a copy of it first and work from there, renaming it to reflect that it is your own company's map.

To copy a map, open it in the Editor using the left menu (not the Editor icon from within the map itself).

Once the map to be copied is open in the Editor, you simply rename it and save it. Use your naming convention to begin, and then you probably want to keep the rest of the name pretty similar to the original.

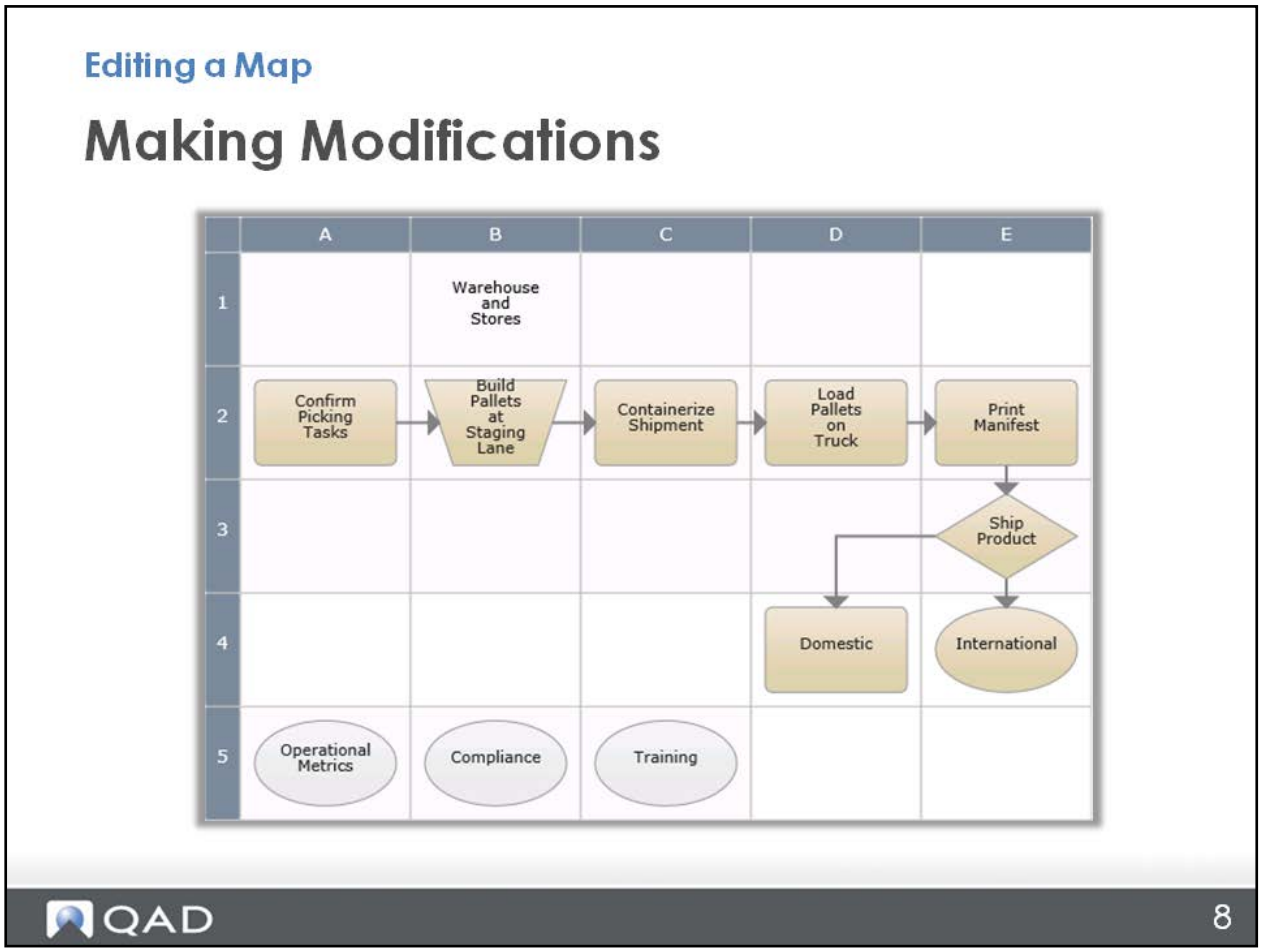
You also probably want to change the owner of this map to reflect that it is yours, and not QAD's.

Making Modifications



Now, look at the map and determine if your company does any added, or different, steps – or if you need to delete any. For example, maybe you want to add two more nodes to differentiate between the processes for domestic and international shipments. (You would have to add an extra row to fit that it in.)

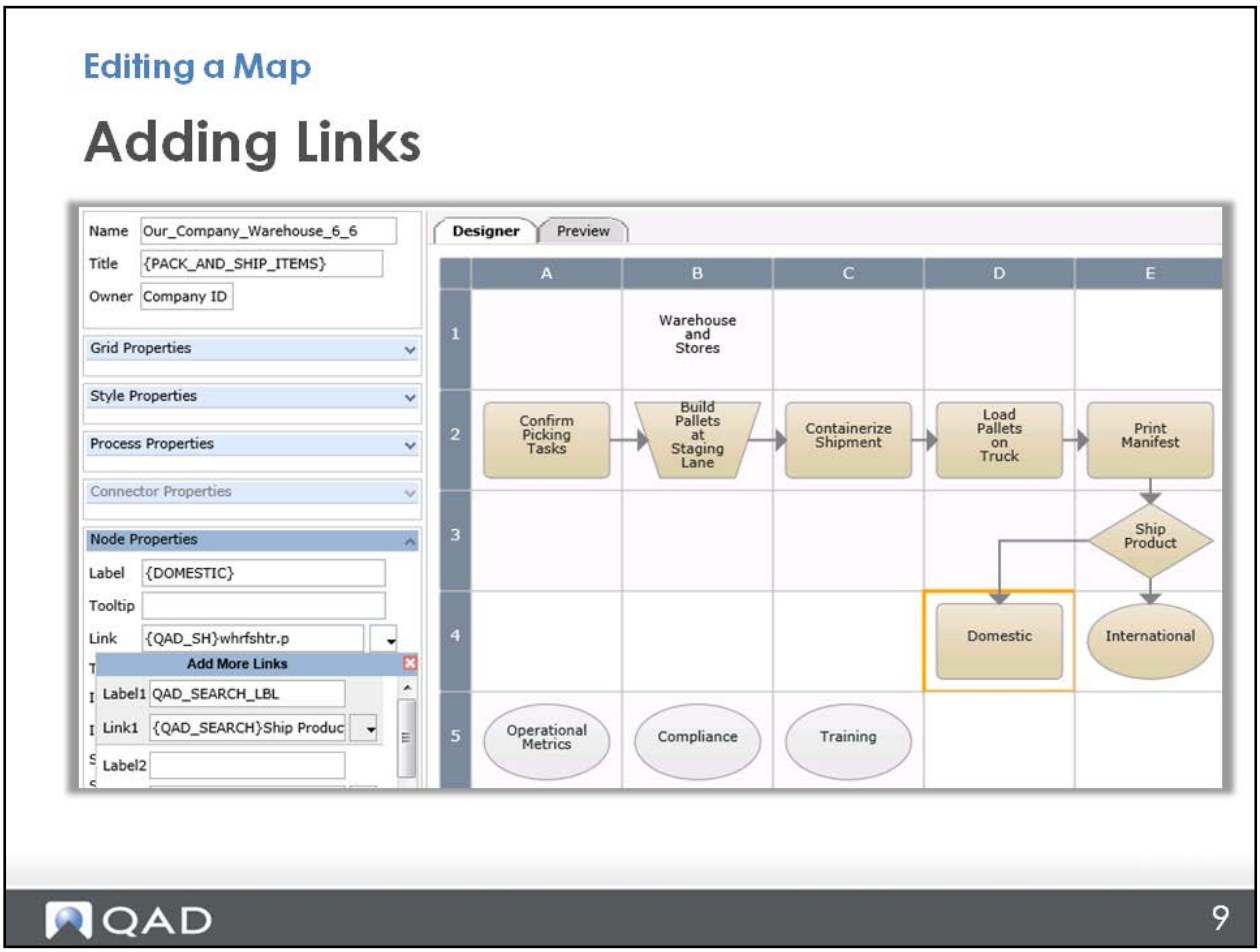
Making Modifications



You change the Ship node to a decision (diamond) shape and add two nodes. You might make the Domestic node a rectangle to link to a screen and you look to see if the label is already created, and it is. Then you search for a label for International, but it is not there, so you create it in Process Label Maintenance. Make this one an ellipse to connect to a separate process map.

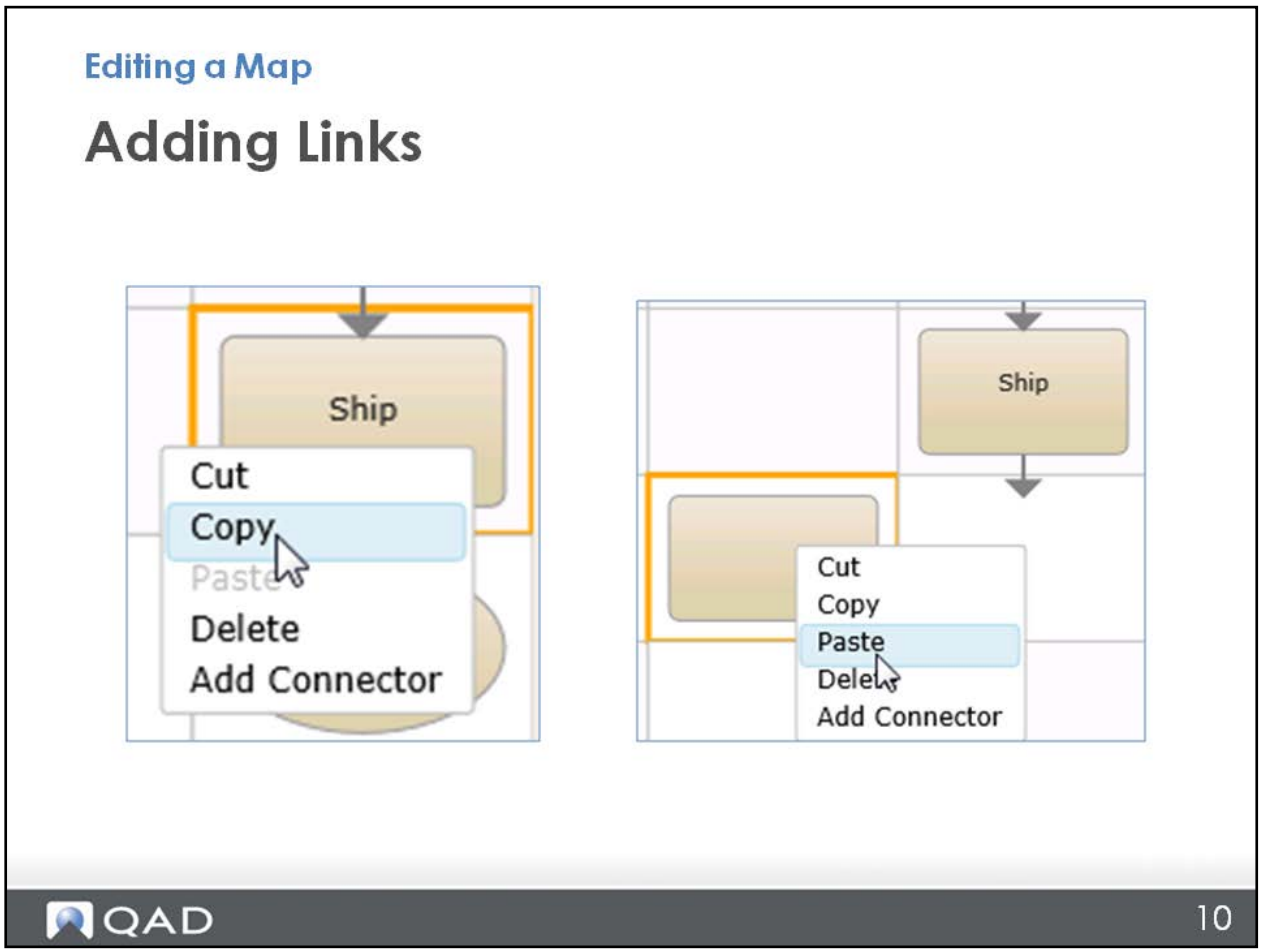
Connect the nodes.

Adding Links



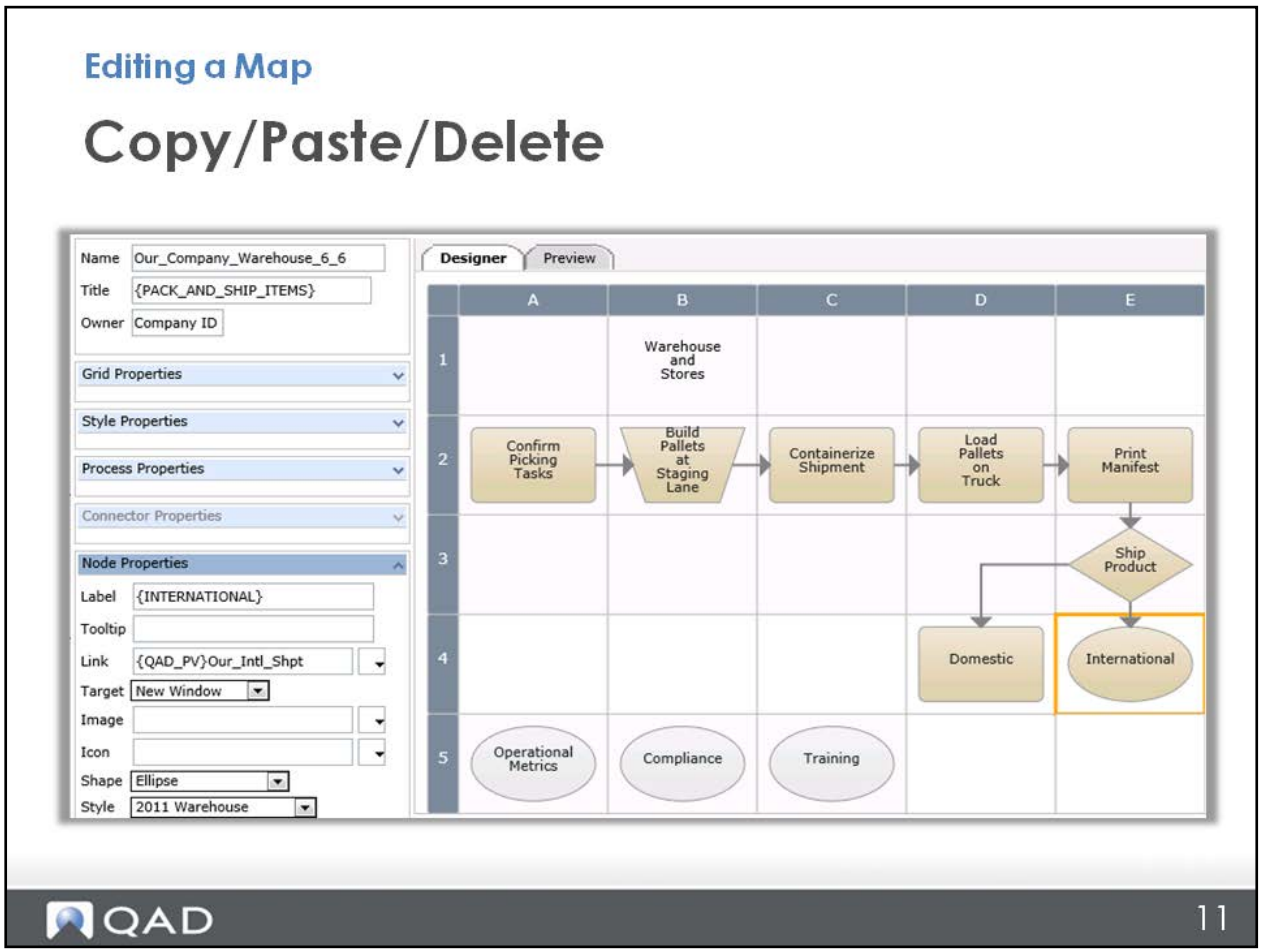
Now, let's say you want the links from the Ship Product node to now be on the Domestic node. You could cut and paste them from the first node ...

Adding Links



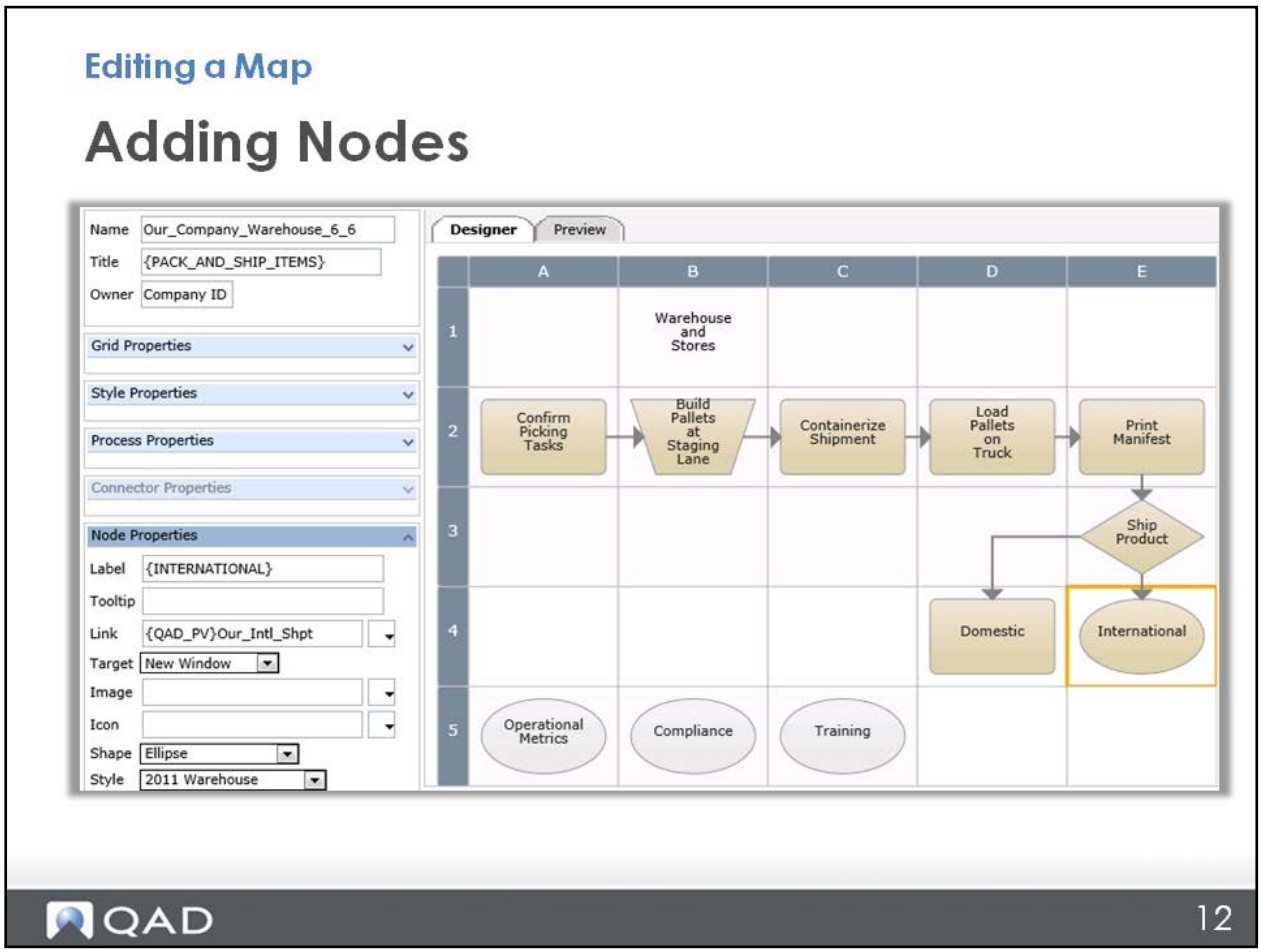
... or you could simply copy and paste the whole Ship node by right-clicking and choosing those options. (You can also delete a node by right-clicking and choosing Delete, or clicking the node and then the Delete key.)

Copy/Paste/Delete



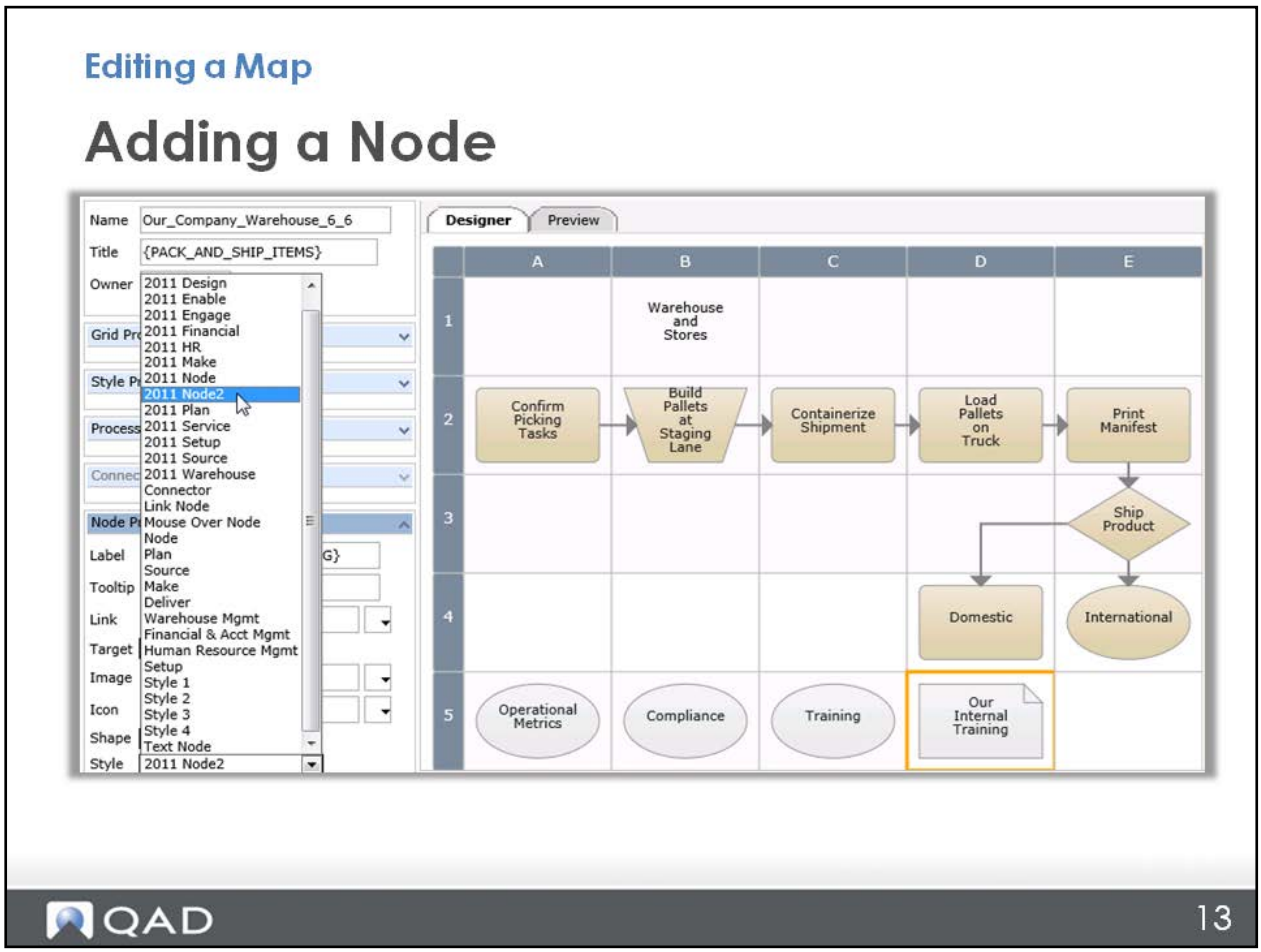
Add your links to the other node (International) ... this time, we are linking to another process map.

Adding Nodes



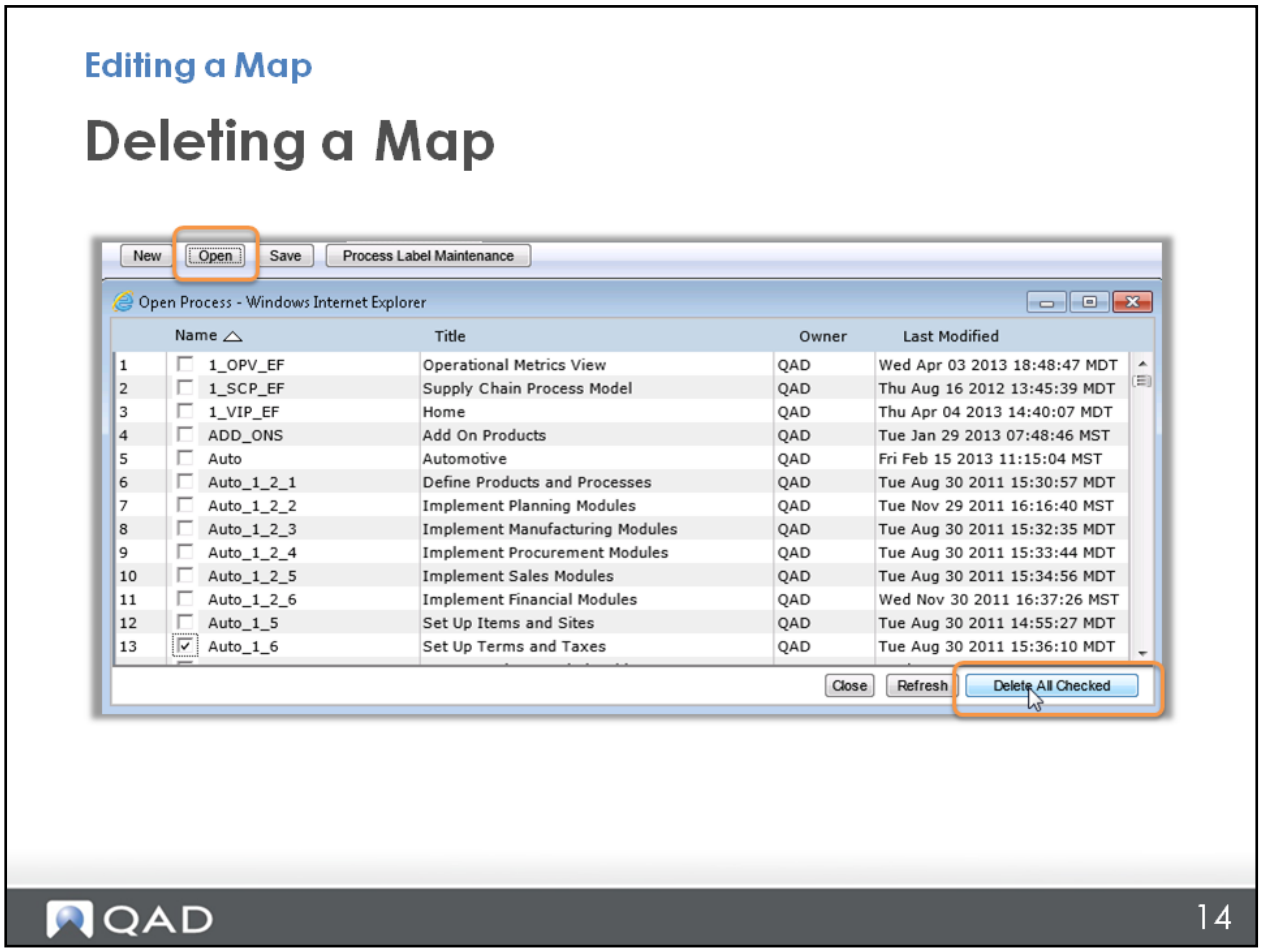
Now see if there are any other nodes you want to add. For example, you might want to add a node to the footer to link to some internal documentation for this whole process.

Adding a Node



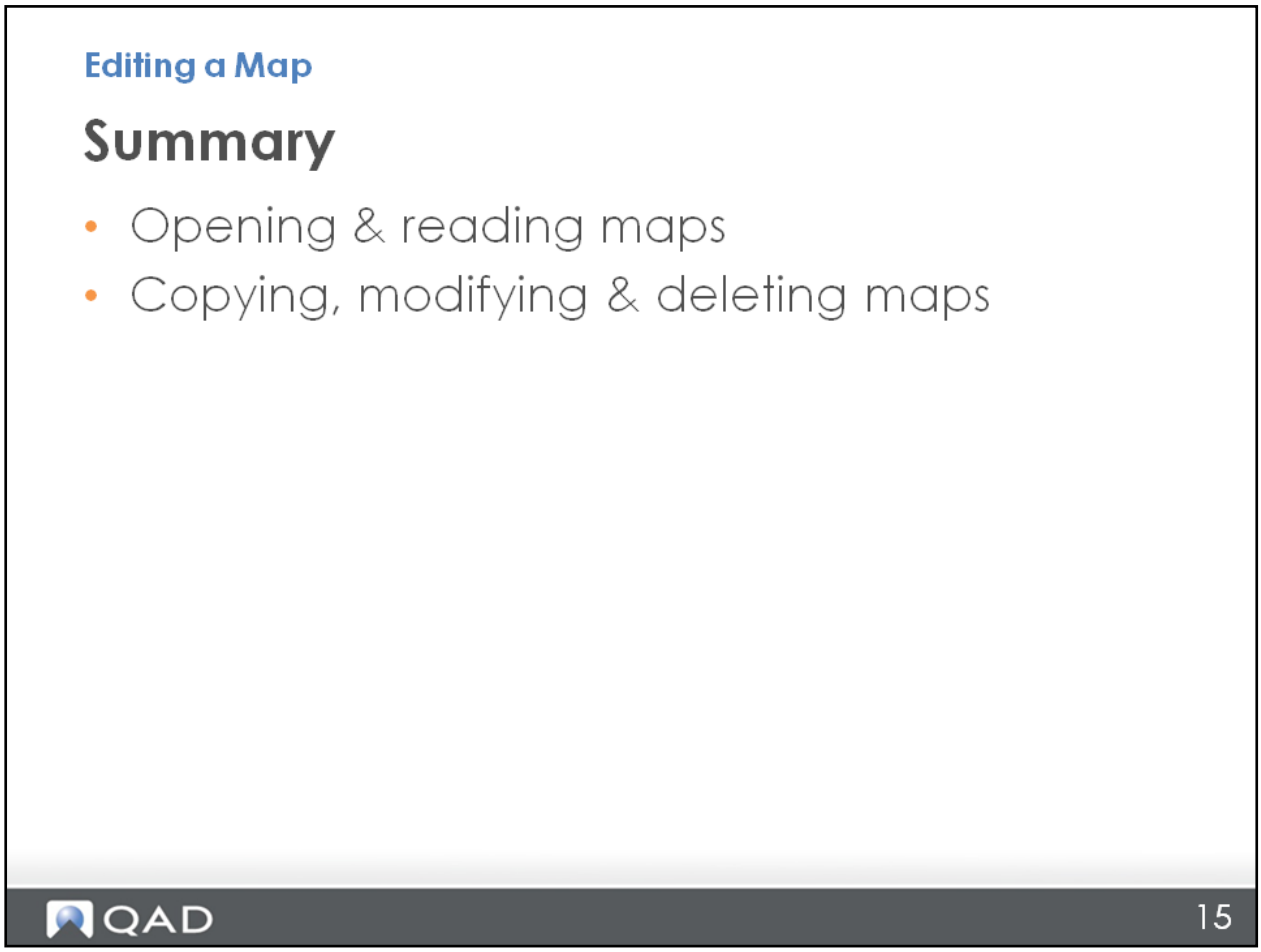
Make the style match the other footer nodes; give it the appropriate shape. Then label it and add your links.

Deleting a Map



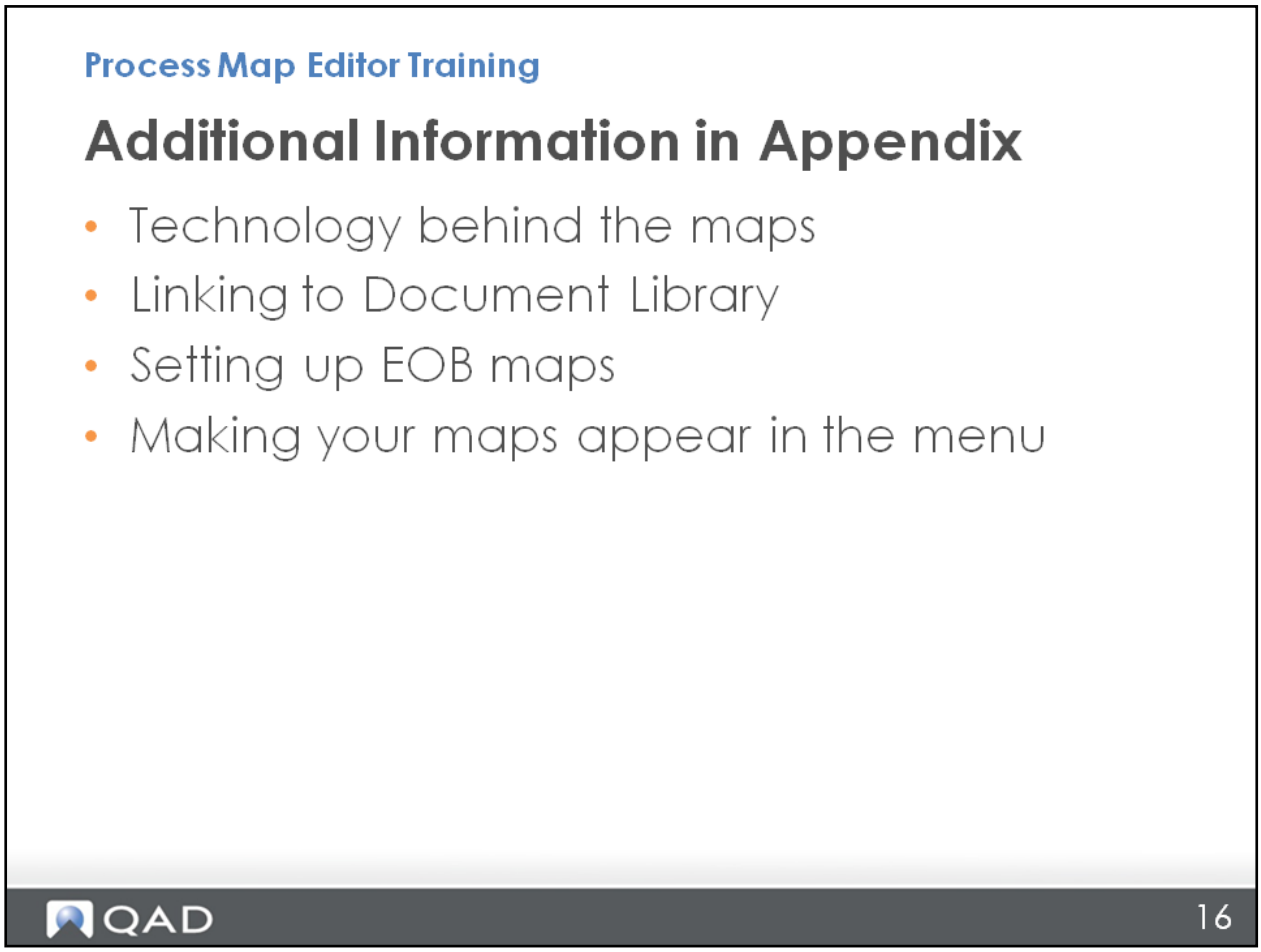
Finally, if you ever want to delete a process map, just click the Open button in the Editor to get the complete list, check what you want to delete, and click “Delete All Checked.” You will be asked to confirm the deletion before closing the window.

Summary



In this section, we reviewed how to open and read maps, and how to copy, modify and delete them.

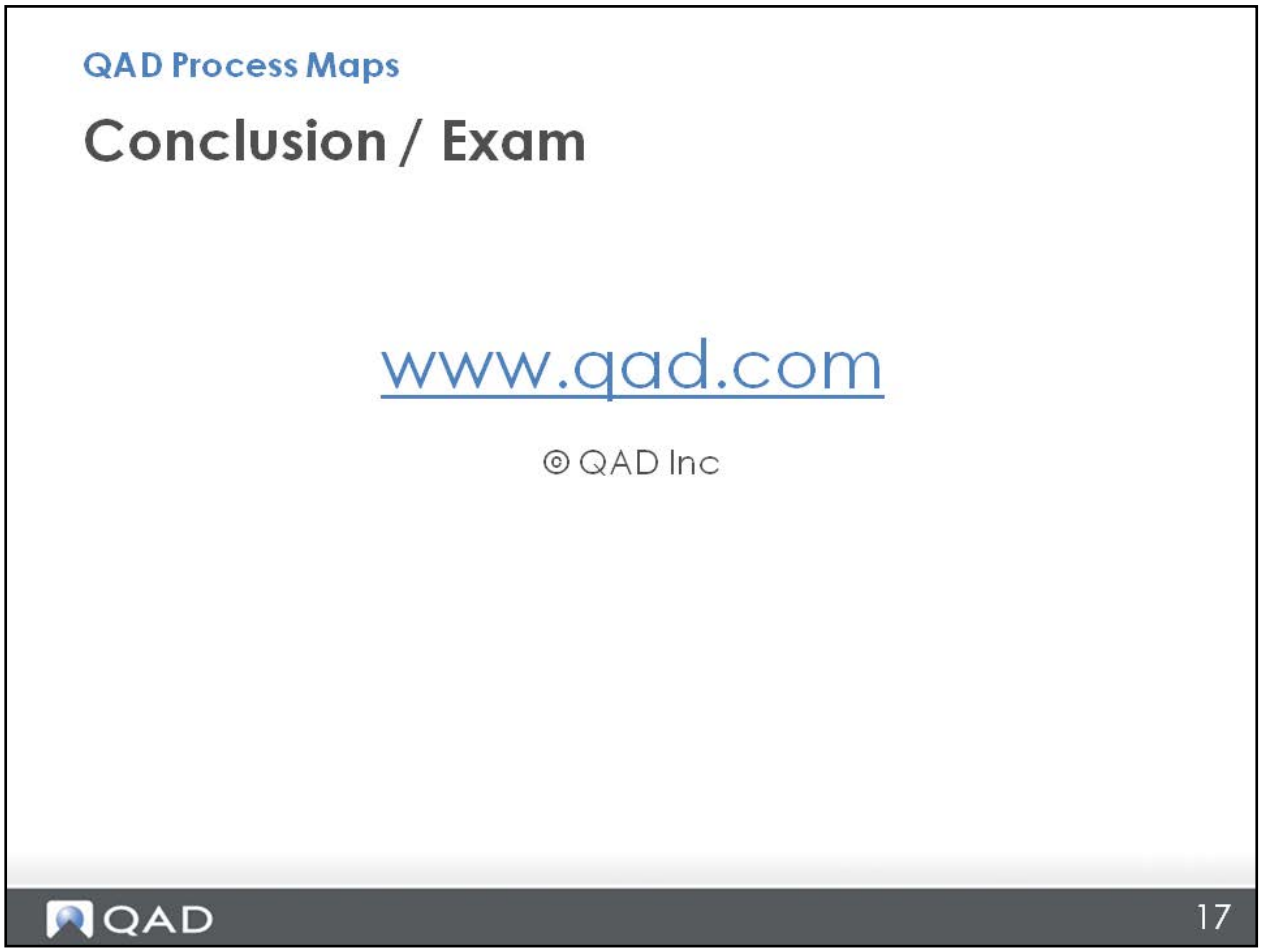
Additional Information in Appendix



We're concluding this training now, but there is some more information available in the Appendix of the training guide if you're interested.

You can learn about the technology behind the maps, how to link them to the Document Library (if you have an older version of the maps that don't already have that) and how to set up the Easy Onboarding maps (if you don't already have them). Also, you may want your custom maps to appear in the menu (under Process Maps) and you will learn how to do that in the Appendix.

Conclusion / Exam



This concludes the training on How to Use the Process Editor, unless you would like to look at some advanced topics that are included in the Appendix, or look around at some other recordings that are available in the Learning Center.

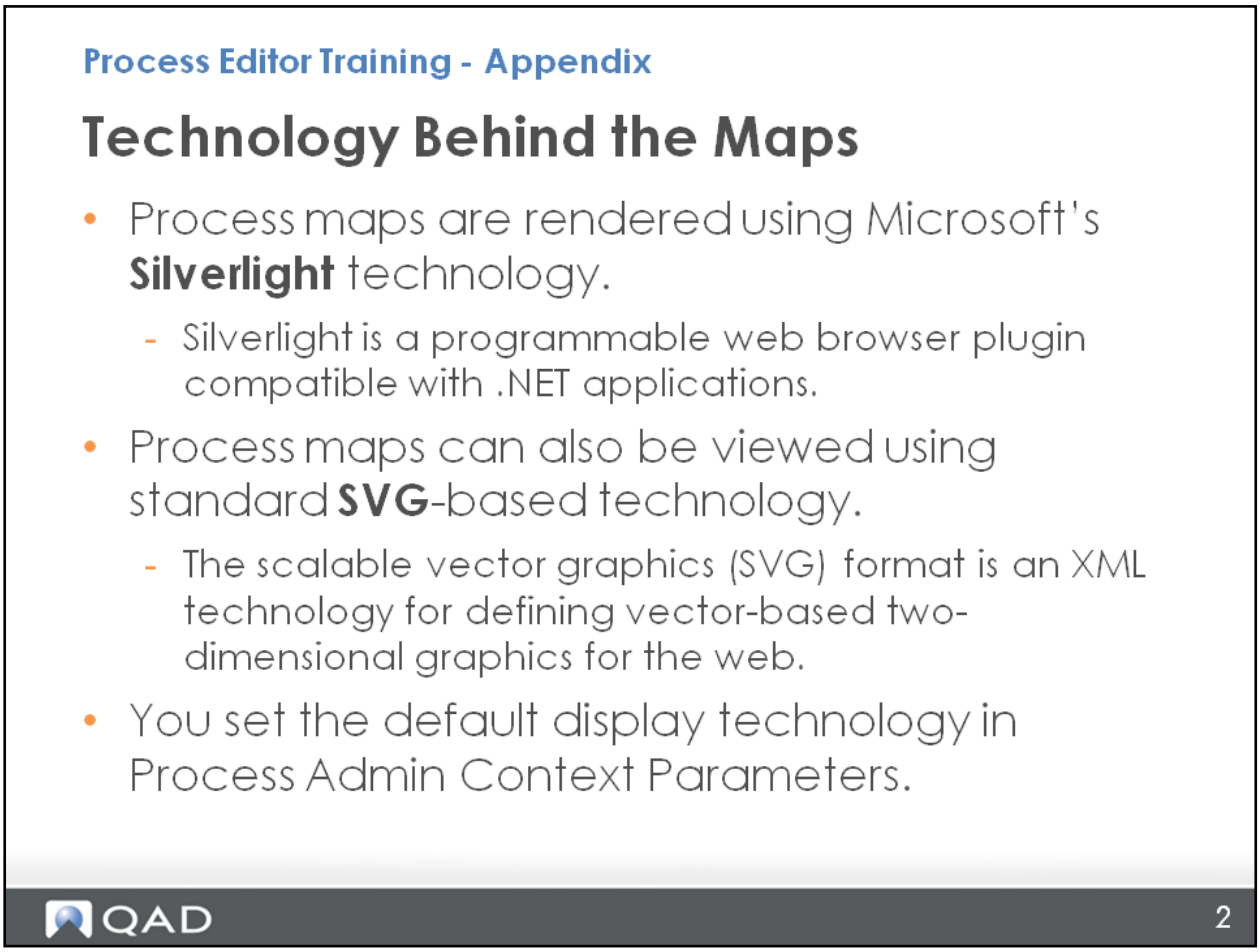
EXAM: There is an exam in the Learning Center (Section 9 of 9), Course # OLT-006930. To officially complete this training, you must take the test. If you are already logged into the Learning Center, click here: https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?selectTab=OLT+Activities

CHAPTER 9

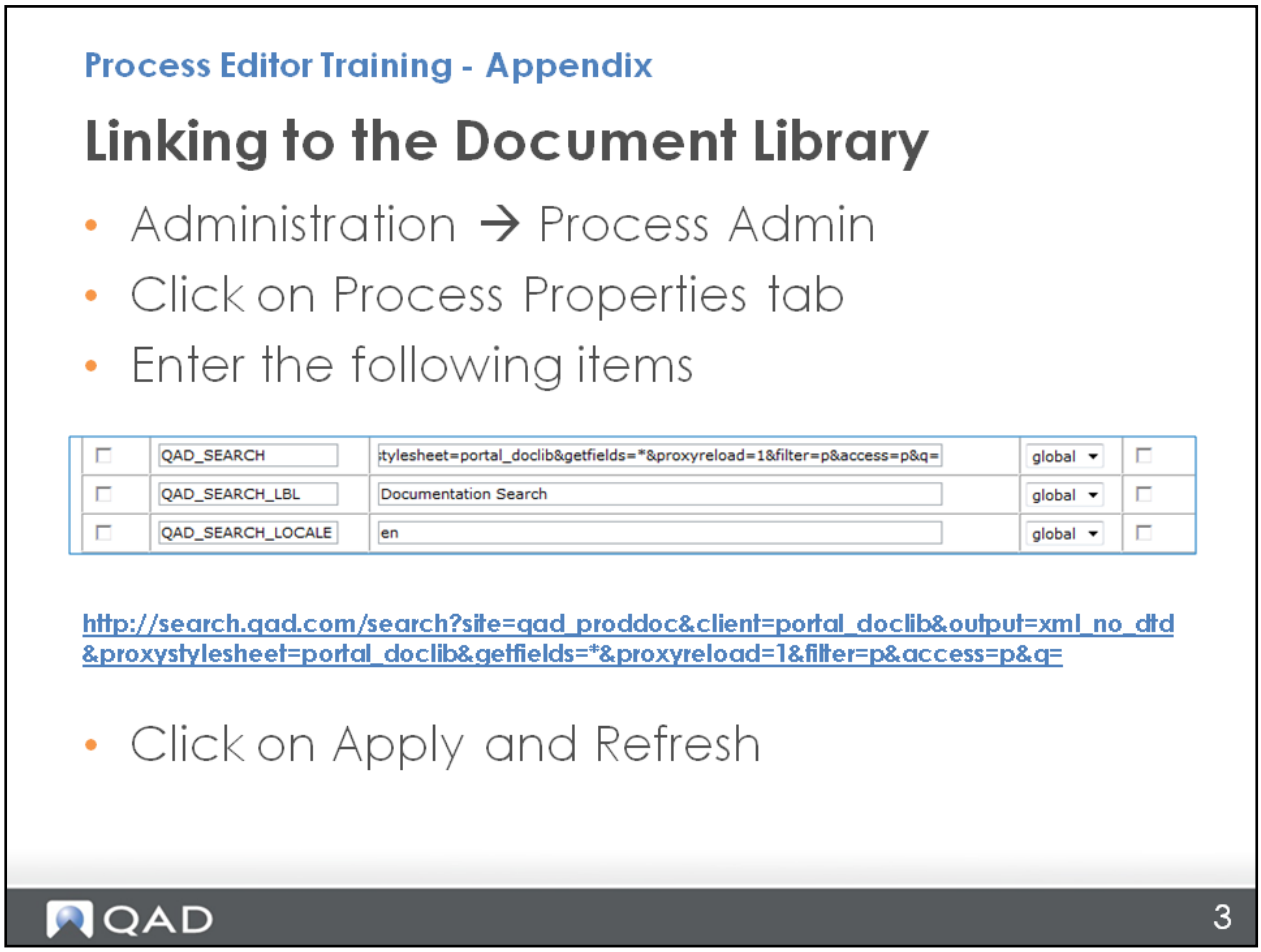
Appendix


Process Editor Training
Appendix
QAD
Our Passion. Your Advantage.

Technology Behind the Maps



Linking to the Document Library

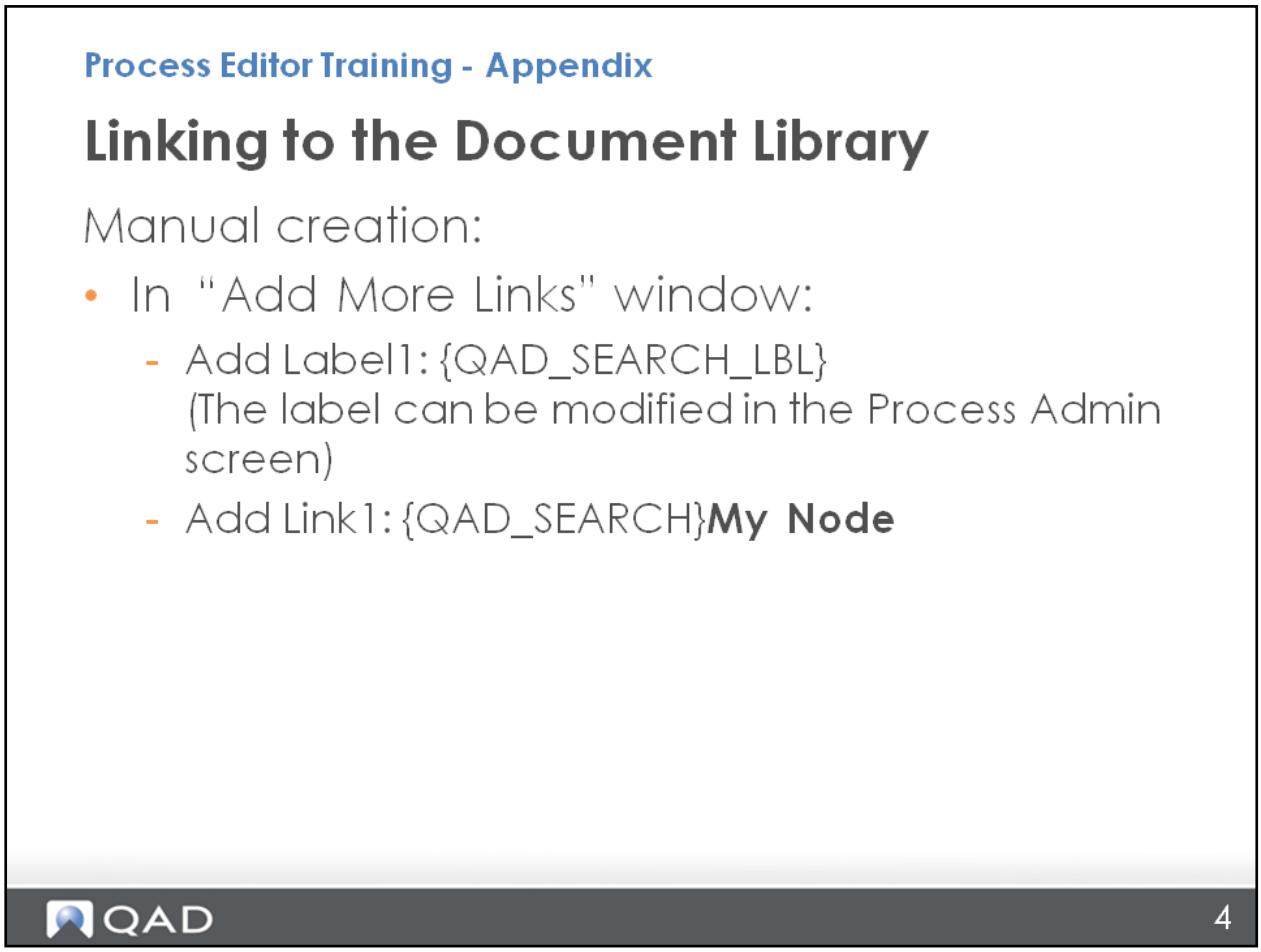


For any maps that you create that do not already have a link to the QAD Document Library, you can add the link yourself, either manually or programmatically.

To begin, if your tokens are not created yet, you need the following three:

1. QAD_SEARCH
2. QAD_SEARCH_LBL
3. QAD_SEARCH_LOCALE

Linking to the Document Library

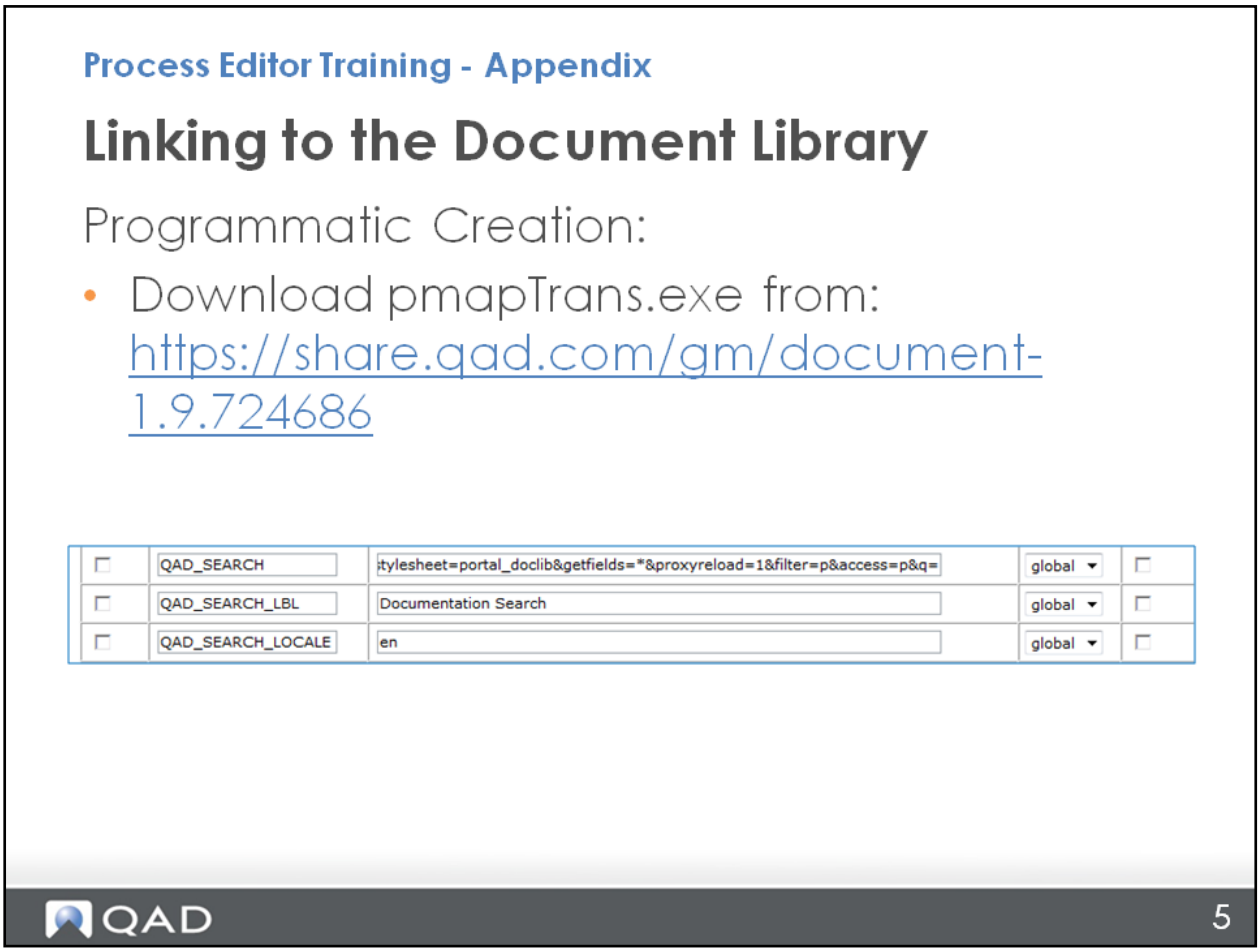


How to link to the Document Library manually:

Label: {QAD_SEARCH_LBL}

Link: {QAD_SEARCH}Enter your node name/label

Linking to the Document Library



How to link to the Document Library programmatically.

This approach requires a specific tool, which QAD R&D can provide.

The link refers to the QAD Share, which is available to QAD employees only. If you are a customer, partner, or alliance that needs access, please contact us at "education@qad.com."

Be sure to make a backup copy first!

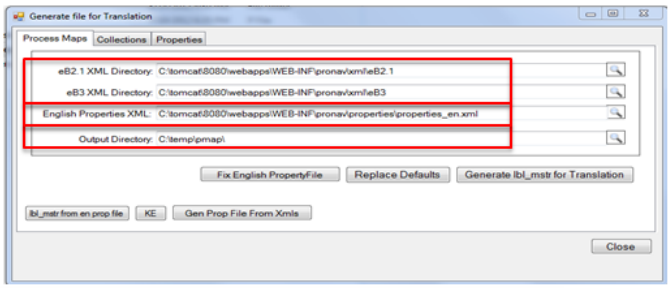
Create Links to the Document Library

Process Editor Training - Appendix

Create Links to the Document Library

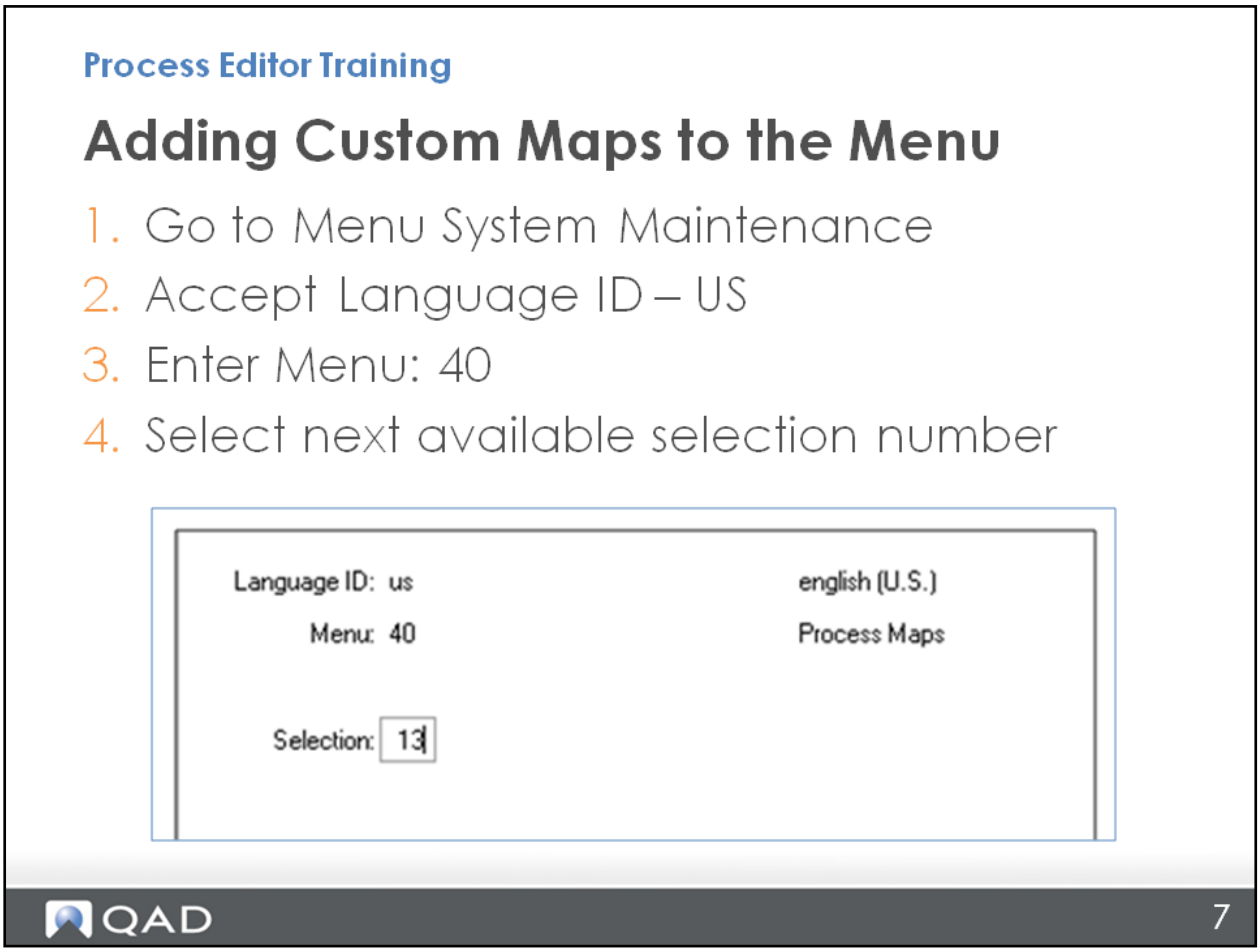
Programmatic Creation:

- Start application
- Enter the XML and property path
- Enter a temp folder for the log file
- Click on the KE button to create the links



QAD 6

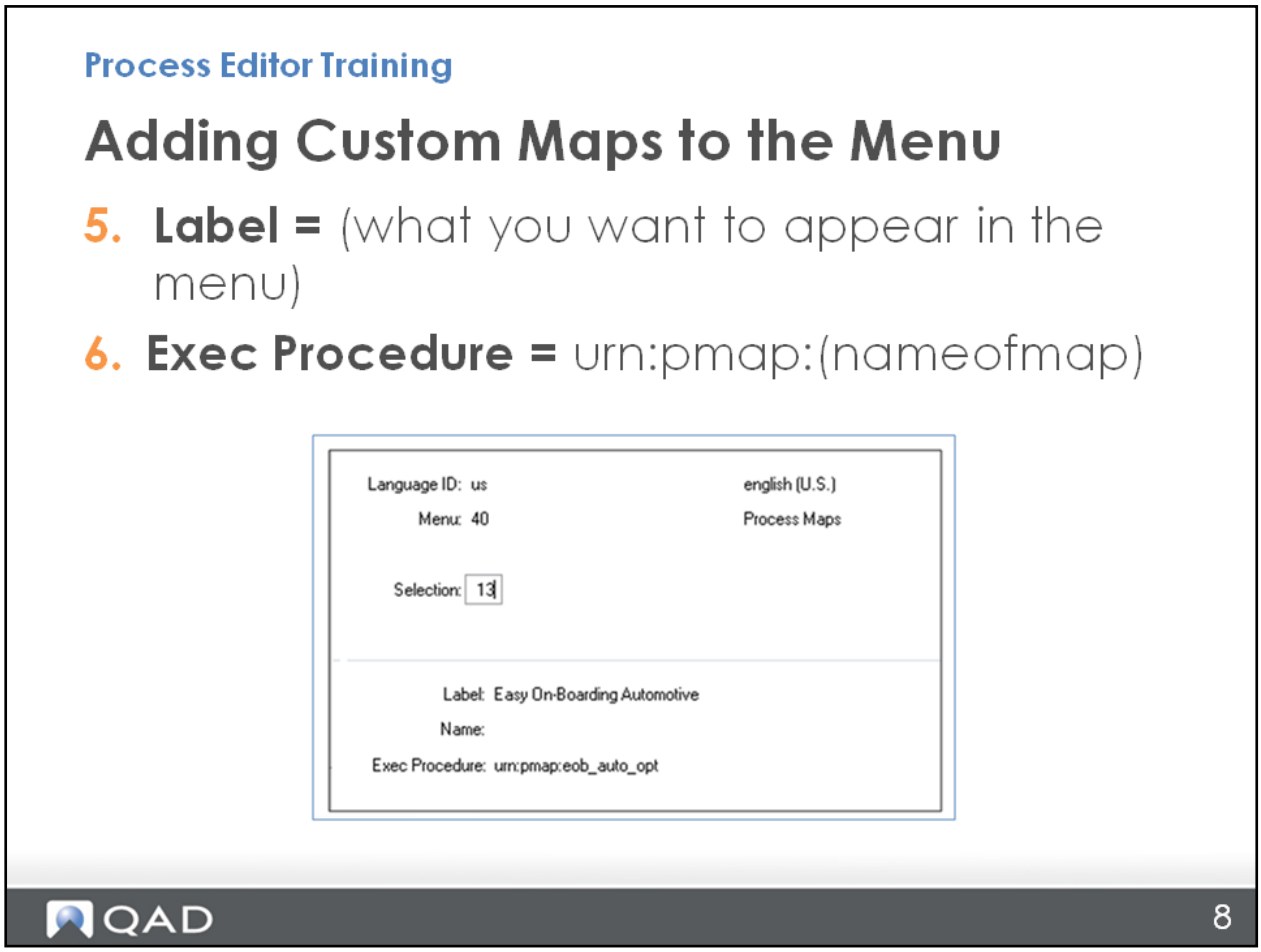
Adding Custom Maps to the Menu



Once you have custom maps, you may want to add them as menu items in QAD Enterprise Applications. Follow these steps, continued on the next slide.

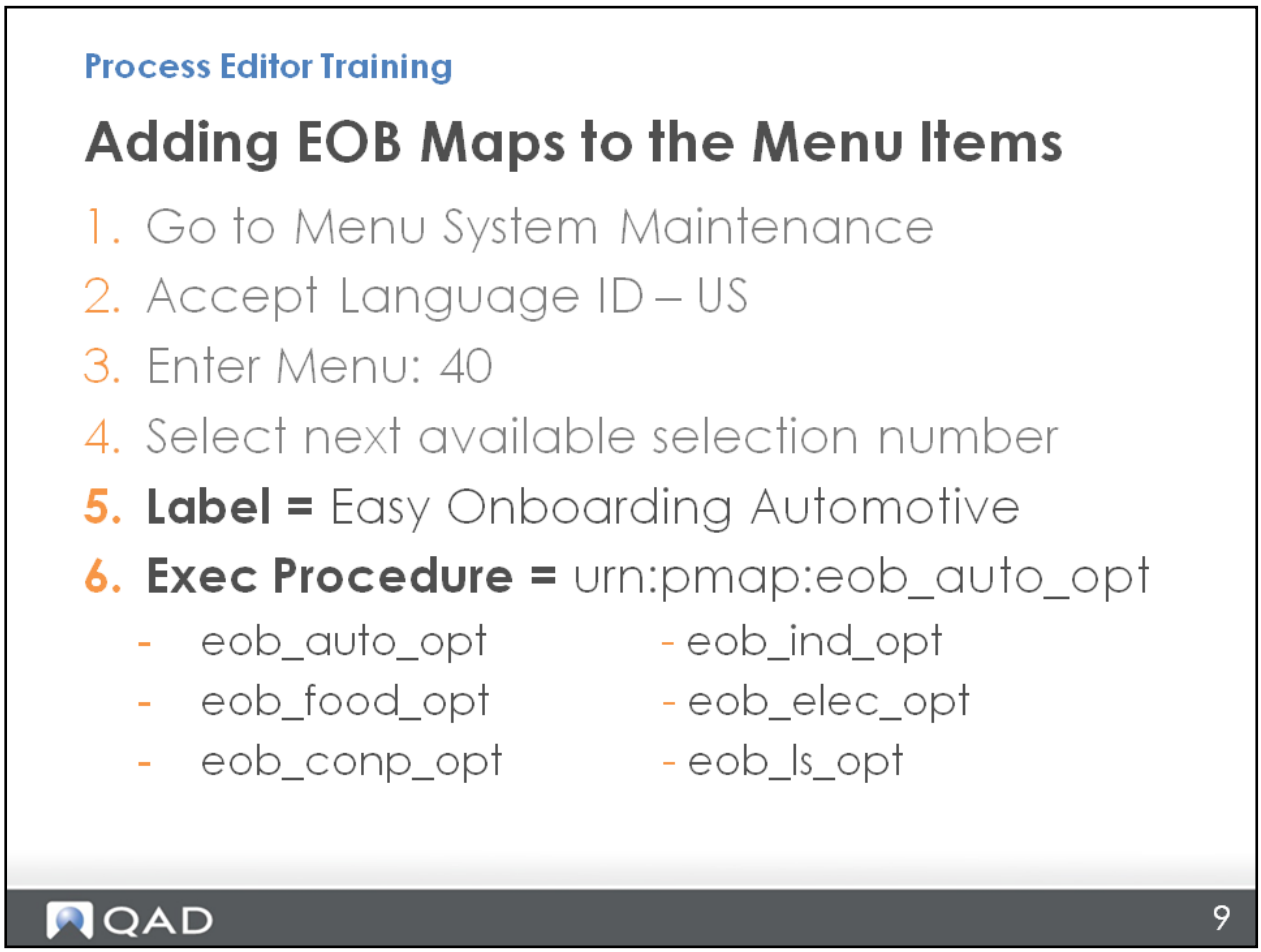
In Menu System Maintenance, click “Next” to accept the language ID and enter 40 for the menu. Then use the down arrow to scroll through the selection numbers to find the next available one.

Adding Custom Maps to the Menu



For the label, enter the name that you want to appear as the menu item (your process map label/name). Then, in Exec Procedure, type in the prefix urn:pmpap: and then the actual name of your process map (from the name field in the Editor).

Adding EOB Maps to the Menu Items



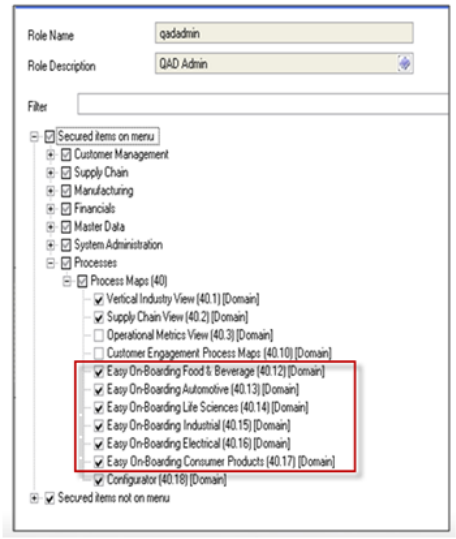
Here's an example of adding an Easy Onboarding Automotive map. Follow the same steps and then use one of these corresponding vertical map names as shown here.

Creating Role Permission

Process Editor Training

Creating Role Permission

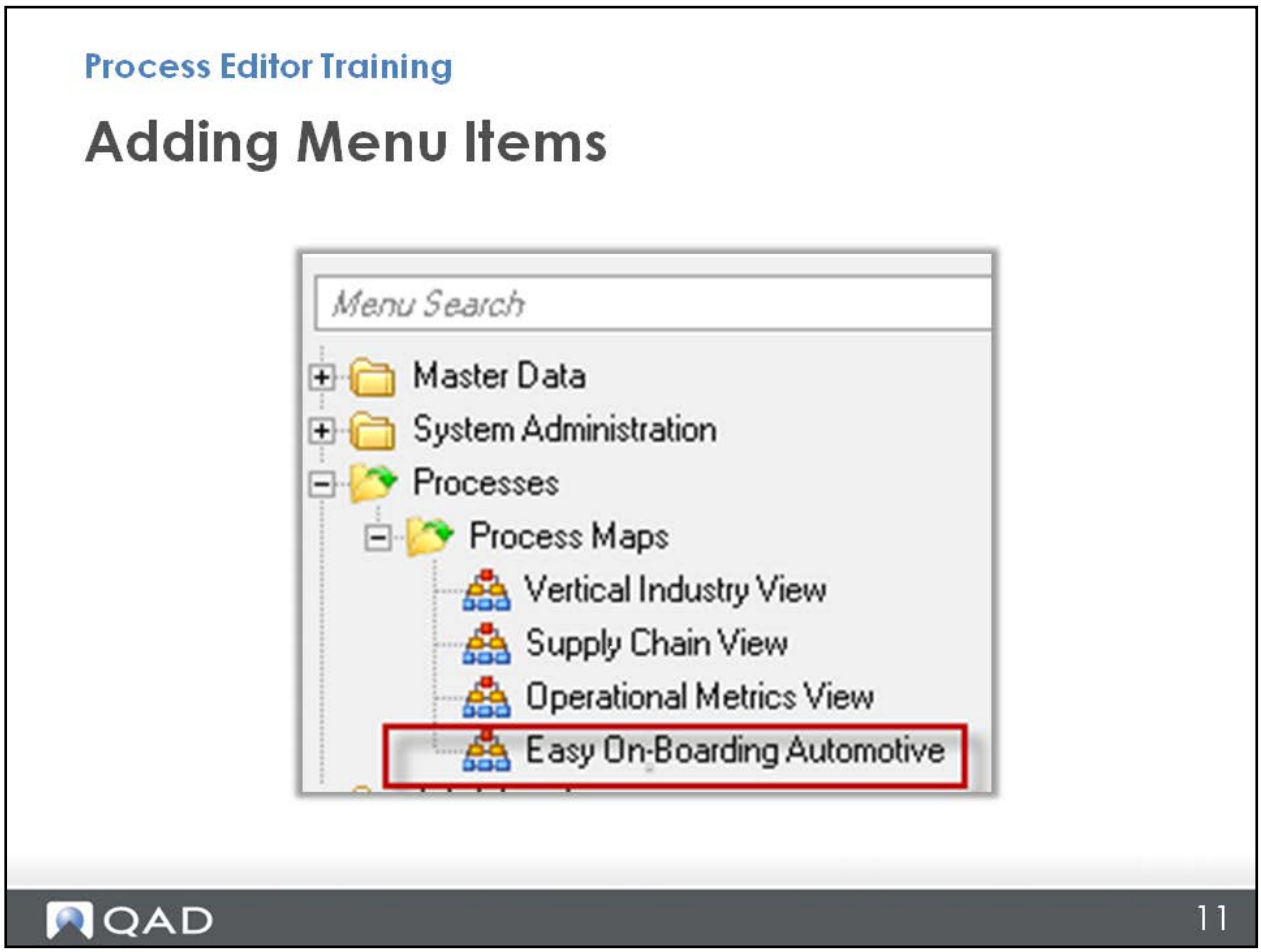
1. Go to Role Permissions Maintenance
2. Dbl-click on Role Name
3. Expand: Secured items on menu>Processes> Process Maps
4. Check the process maps you're adding
5. Click the Save button



QAD 10

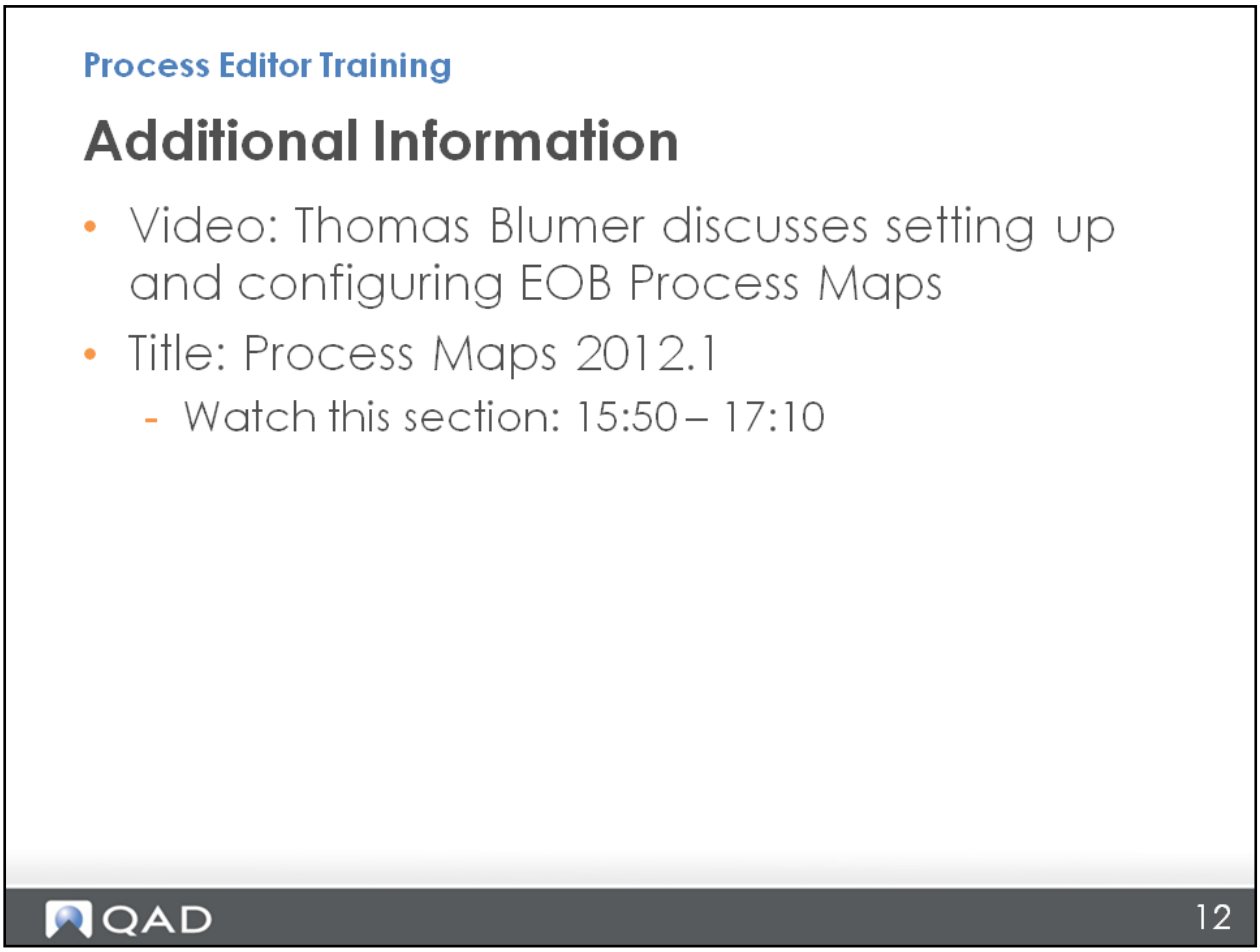
Once the menu items have been created, you have to set the role permissions so the system knows who to make them visible to. Follow these steps.

Adding Menu Items



Now, close out of QAD Enterprise Applications and reopen it, then check the menu to make sure your maps appear there. Sometimes, because of computer caching, you have to refresh the maps so they appear. If you don't see your map, refresh by going to the Process Admin screen (under Administration menu) and click "Refresh."

Additional Information



Here is some additional training in the Learning Center.

© QAD Inc