



QAD Enterprise Applications  
Enterprise Edition

# Training Guide **QAD Process Maps**

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ProcessMaps\_TG\_v2016EE.pdf/mdf

**QAD Inc.**

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

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# QAD Process Maps Change Summary

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

<b>Date/Version</b>	<b>Description</b>	<b>Reference</b>
April 2016/v2016 EE	Rebranded for QAD 2016 EE	--
March 2015/v2015 EE	Rebranded for QAD 2015 EE	--
October 2013/v2013 EE	Updated Prerequisites Section	--
August 2013/v2013 EE	1st Release, Updated chapter 5, 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.

For more information, see *Introduction to QAD Enterprise Applications User Guide*.

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 Virtual Environments (QPC)**

## Virtual Environments (QPC)



Our Passion. Your Advantage.

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)

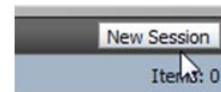
### Logging On

## QAD Product Center (QPC)

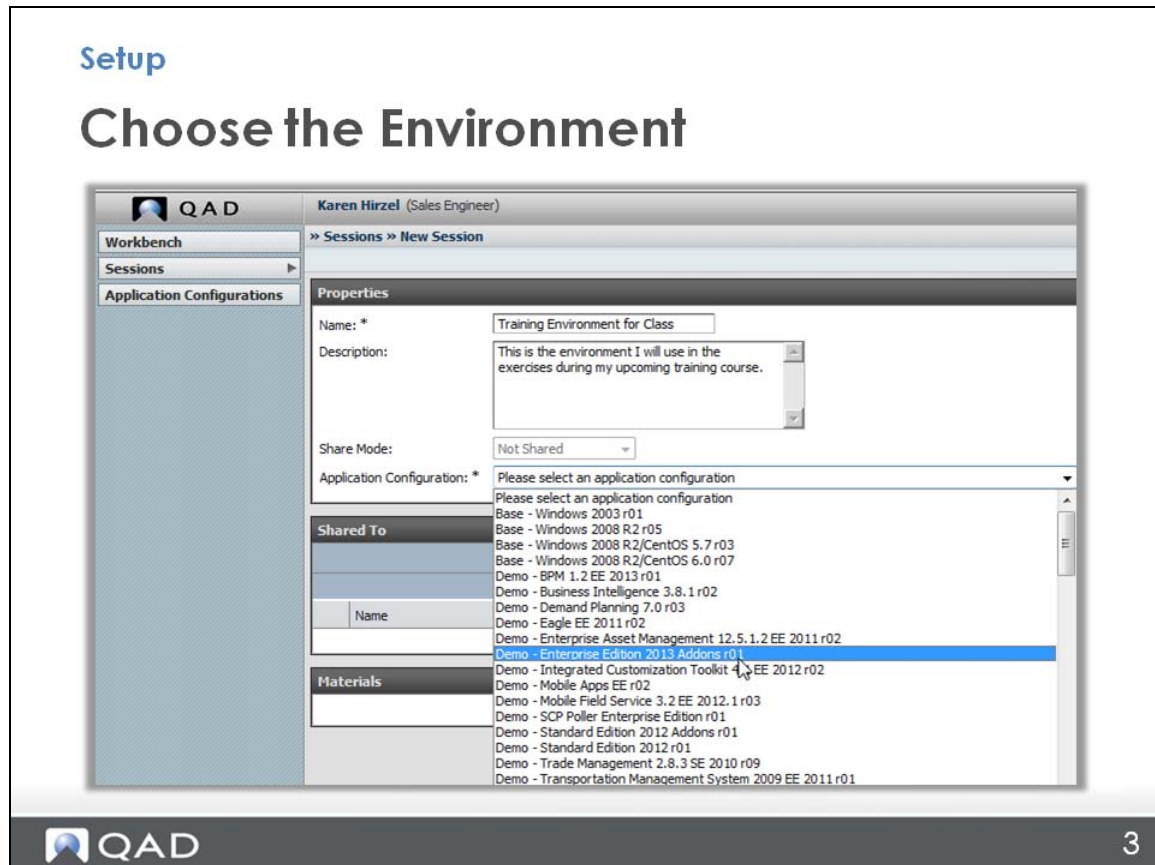
1. Go to: <http://qpc.qad.com>
2. Log in with network ID
3. Choose your department



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



## 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


The screenshot displays the QAD interface for scheduling a session. At the top, the word "Setup" is visible. Below it, the main heading reads "Schedule the Session or Start Now". A "Session Commands" dropdown menu is open, showing options: "Schedule", "Reschedule", "Start Now", "Cancel Reservation", "Extend Reservation", and "Take Snapshot". A mouse cursor is pointing at the "Schedule" option. Below this, a window titled "Sessions » New Session Schedule — Process Editor Training Aug 2013" is shown. It contains a "Schedule" section with an "Advanced Options" sub-section. The "Preferred Pool" is set to "Default Pool". The "Start" time is "7/29/2013 05:00 PM", the "Duration" is "18:00:00 (dd:hh:mm)", and the "End" time is "8/16/2013 05:00 PM". The "Time Zone" is set to "(UTC-05:00) Eastern Time (US & Canada)". There are "Start Now" and "Schedule" buttons in the top right corner of the window. The QAD logo and the number "4" are visible in the bottom left and right corners of the interface, respectively.

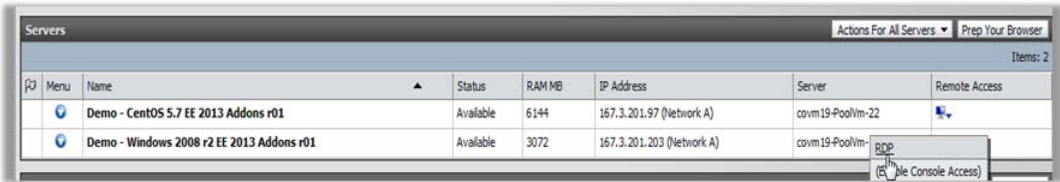
Under Session Commands on the far right, choose to “Schedule.” Then, select your time zone and the start/end time. Or, if you need to start right away, there is an option to “Start Now.” (It takes several minutes to process though.)


## Opening the Session

**Setup**

### Opening the Session






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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

**Setup**

### Open QAD Enterprise Applications

- ID = mfg
- PW field is left blank



The image shows a slide titled "Setup" with the heading "Open QAD Enterprise Applications". It lists two bullet points: "ID = mfg" and "PW field is left blank". Below the text are two images: on the left, a blue icon for "QAD Enterprise Applications - US Maps"; on the right, a screenshot of the "Login" dialog box for "QAD Enterprise Applications". The dialog box has fields for "User" (containing "mfg"), "Password" (blank), and "Log on to:" (a dropdown menu with "qadui" selected). There are "OK" and "Cancel" buttons at the bottom. At the bottom of the slide, there is a QAD logo and the number "7".

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](mailto:productcenter@qad.com)) or the Education mailbox ([education@qad.com](mailto:education@qad.com)).

Chapter 1

# **Introduction: Process Maps and Process Editor**

## Introduction

# 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

### Introduction

# Introduction: Process Maps and Process Editor



This topic discusses how to use the Process Editor.

## A Picture is Worth a Thousand Words


Introduction to Process Maps


### A Picture is Worth a Thousand Words

**Lima**  
Peru

1. Head north on **Galeano Y Mendoza** toward **Guillermo Dansey** 280 m
2. Turn right onto **Argentina** 2.1 km
3. At the roundabout, take the **4th** exit 500 m
4. Slight right onto **Puente del Ejercito** 290 m
5. Take the ramp 260 m
6. Continue straight 1.6 km
7. Continue straight onto **Via de Evitamiento** 11.3 km
8. Continue onto **Via de Evitamiento** 350 m
9. Continue onto **Panamericana Sur** 9.6 km
10. Continue onto **Carretera Panamericana Sur/Route 1S** 6.4 km
11. Continue on the ramp and merge onto **Route 1S** 124 km
12. Continue onto **Nueva Panamericana Sur** 12.2 km

➔



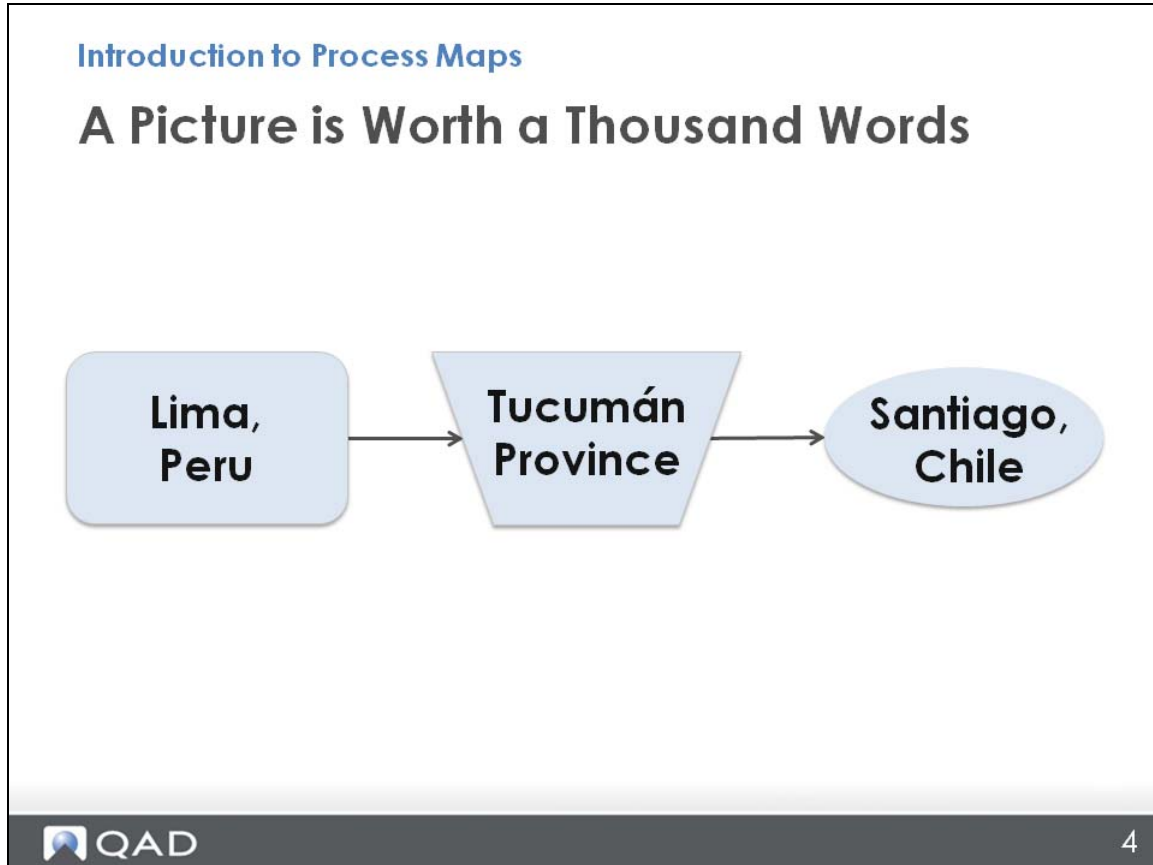

3

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.



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.

### Introduction to Process Maps


## A Picture is Worth a Thousand Words


Lima Peru → Tucumán → Santiago Chile

**Pisco** — **Nasca** — **Arequipa** — **Arica** — **Calama** → **Salta**

The most densely populated and the smallest by land area province of Argentina

Climate:  
Summer 30°C to 33°C  
Winter 10°C to 18°C



 QAD 5

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.

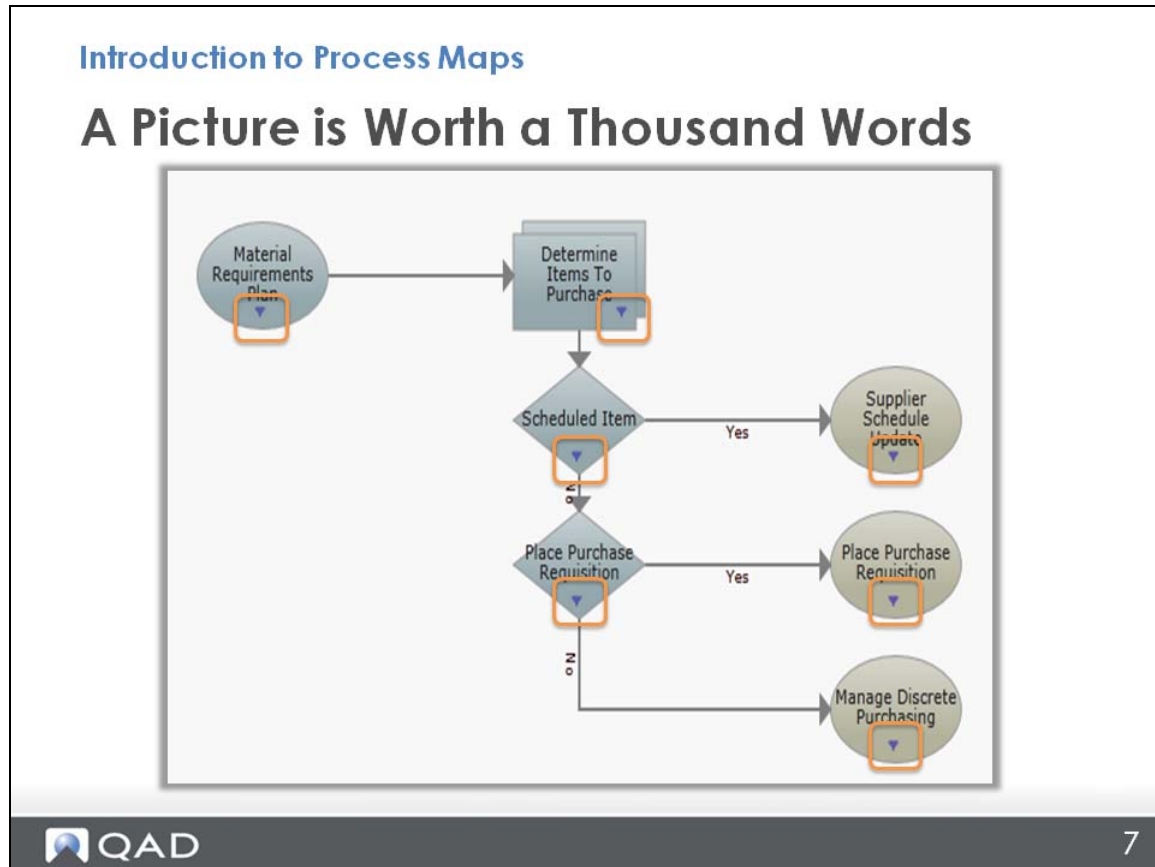
## Introduction to Process Maps

# A Picture is Worth a Thousand Words

How to Schedule Production



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.

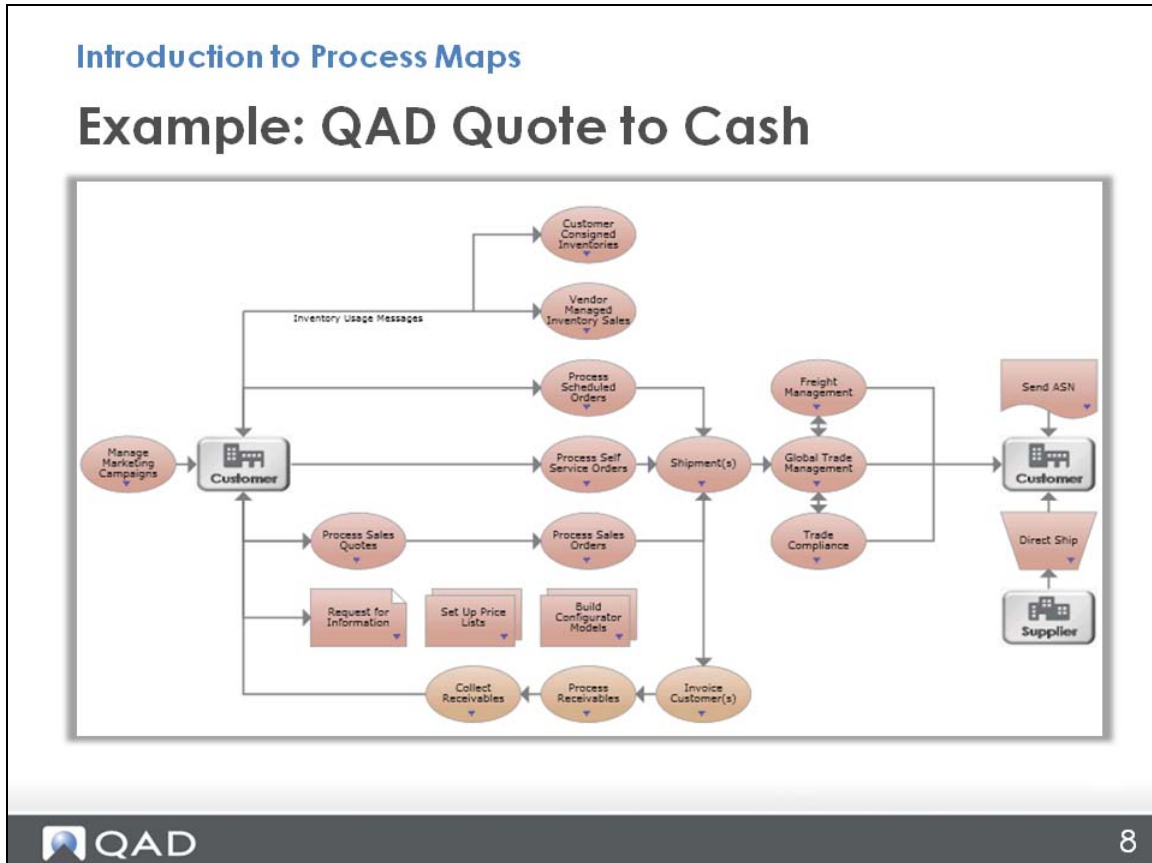


So, rather than a simple flow chart about scheduling production, you can have a process map with links to the screens to use for that step and the supporting training documentation.

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



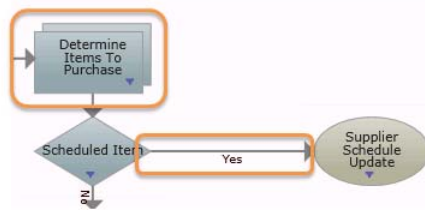
Here is an example of the QAD Quote to Cash process.

## Terminology

### Introduction to Process Maps

## Terminology

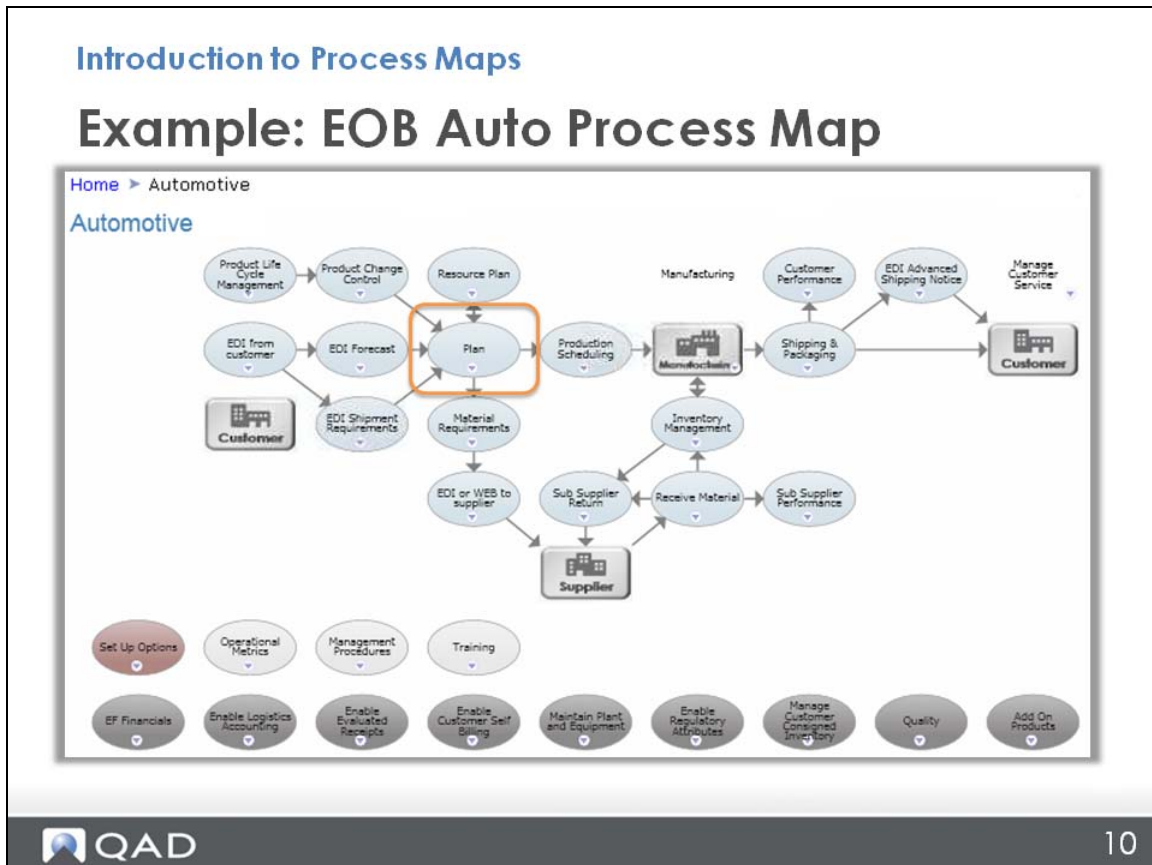
- Process Map
- Nodes
- Connectors
- EOB = Easy On Boarding



Key terms used in this session include:

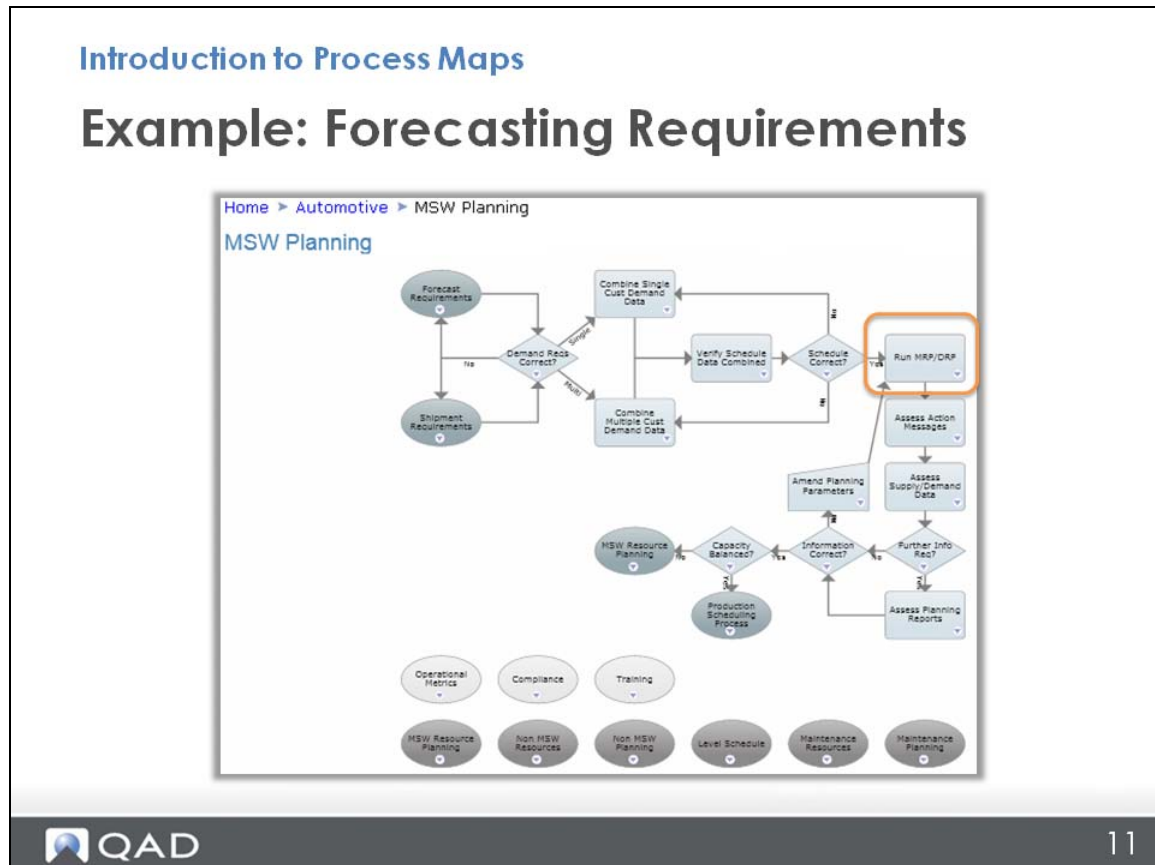
- A process map (or the term “process mapping”) refers to a technique where a business process or workflow is converted into a visual, step-by-step diagram.
- The shapes on a process map are called nodes, and they typically indicate a step within the process.
- Connectors are lines or arrows indicating 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

Introduction to Process Maps

### Example: Net Change Materials Plan

Net Change Materials Plan X

Go To Actions Copy Print Preview Attach

Site:  To:

Synchronized Calculation:

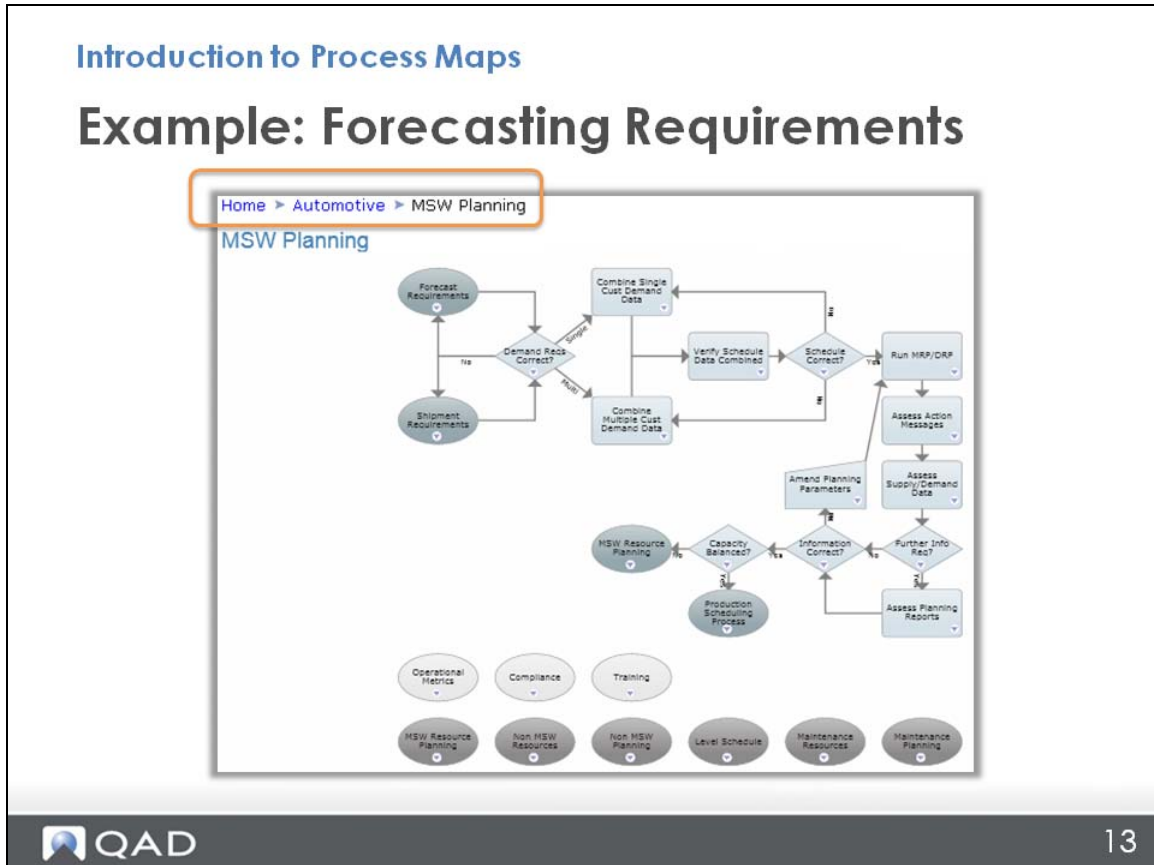
Synchronization Code:

Number of AppServer Threads:

QAD 12

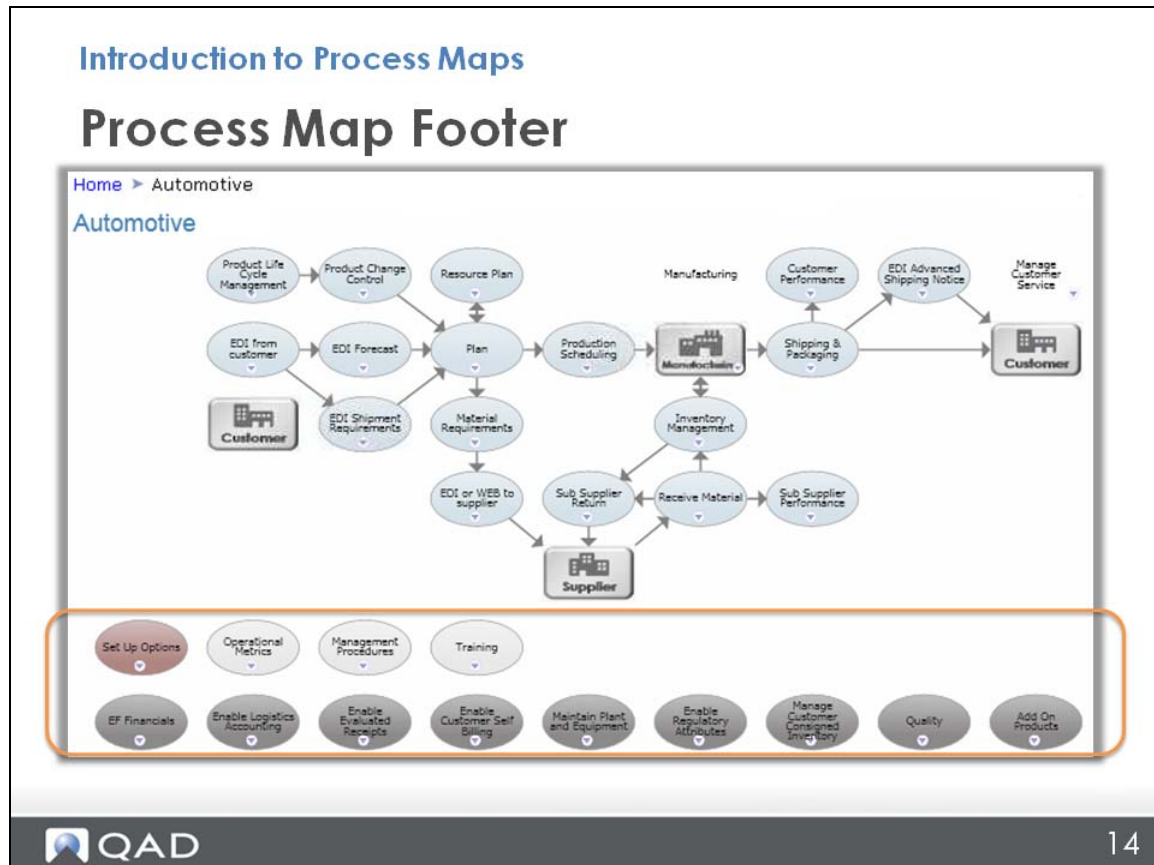
You are taken to the Net Change Materials Plan screen, which is where the task is performed.

## 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



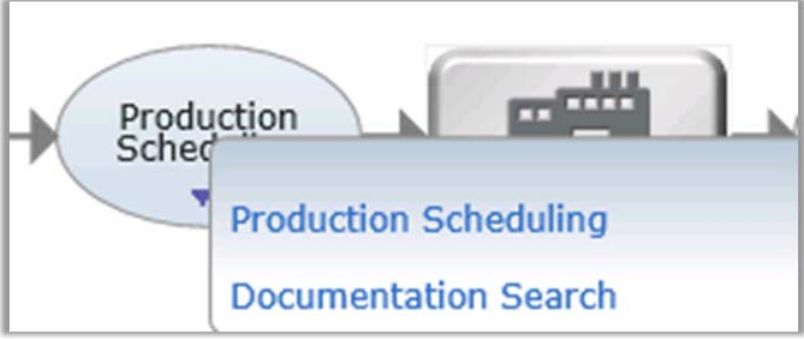
Back at the top-level Automotive process maps, you see a set of nodes at the bottom, called the footer section. This shows generic functional processes as opposed to industry-specific processes. Having these functional processes displayed shows you the wider potential of QAD. These may not be something 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

Introduction to Process Maps

### Links to Screens and Documentation



The diagram illustrates a process map element. On the left, a light blue oval contains the text "Production Sched...". An arrow points from this oval to a light blue rectangular box on the right. This box contains two lines of text: "Production Scheduling" and "Documentation Search". Above the box is a small icon of a factory building. The entire diagram is set against a white background with a light blue gradient at the bottom.

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

## Introduction to Process Maps

# Links to Screens and Documentation

Screenshot of a search results page for "Schedule Purchase Orders". The page displays search results for "Schedule Purchase Orders" (Results 1 - 10 of about 4990). The search results are sorted by relevance. The page includes a search bar, a "Navigate" sidebar, and a main results area.

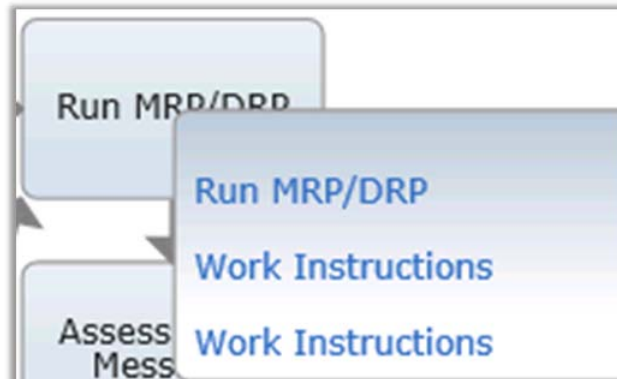
**Search Results:**

Book Type	Product Module	Product Suite	Book Title
Training Guide	Enterprise Asset Management	N/A	Enterprise Asset Management Training Guide
Training Guide	N/A	Enterprise Edition 2011.1	Advanced Repetitive Costing Training Guide

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

## Introduction to Process Maps

# Links to Screens and Documentation



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

## Introduction to Process Maps

# 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.

**Introduction to Process Maps**

## Links to Screens and Documentation

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[Product Changes](#)

[Downloads](#)

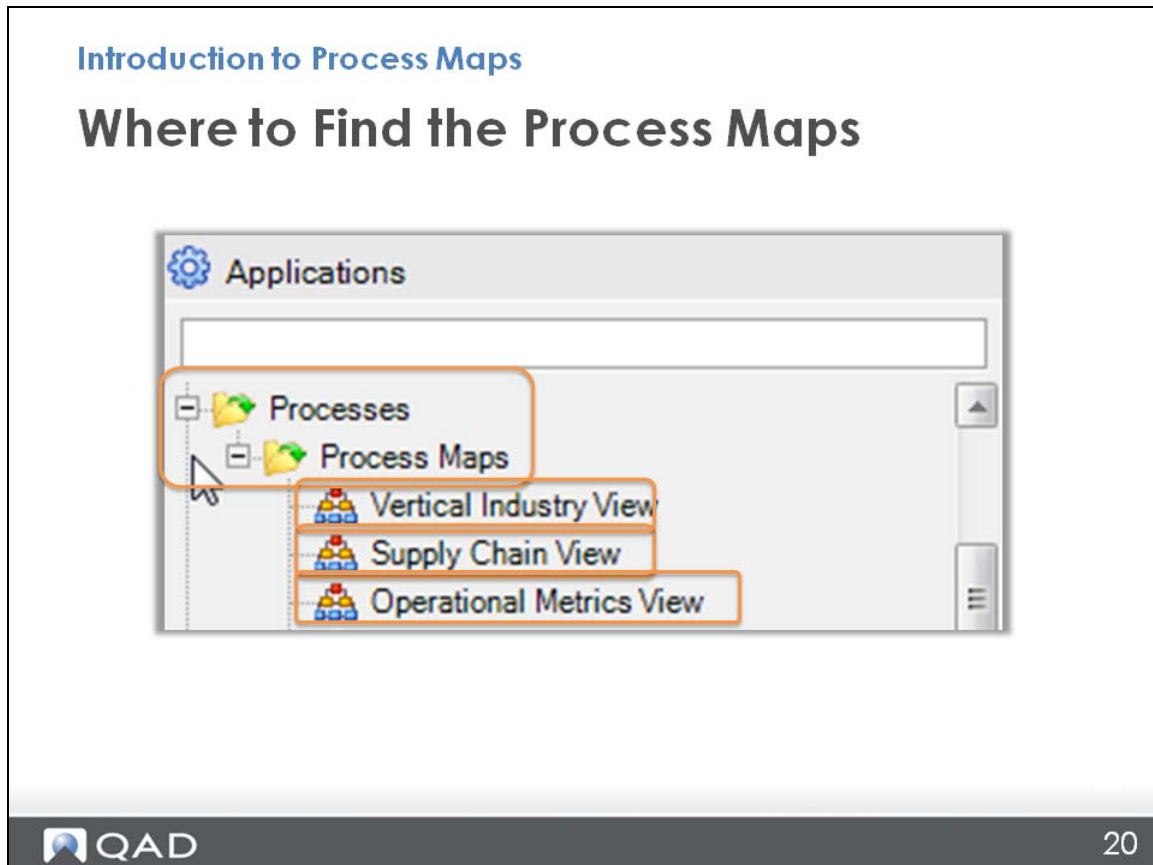
[Communities](#)

[Documentation](#)

**QAD** 19

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:

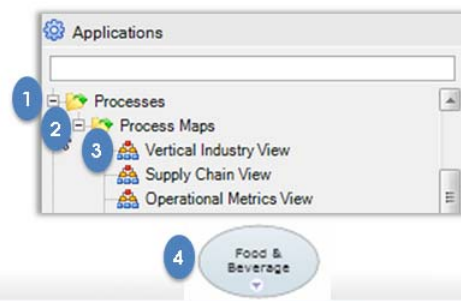
- Vertical industry
- Supply chain
- Operational metrics

## Exercise

### Introduction to Process Maps

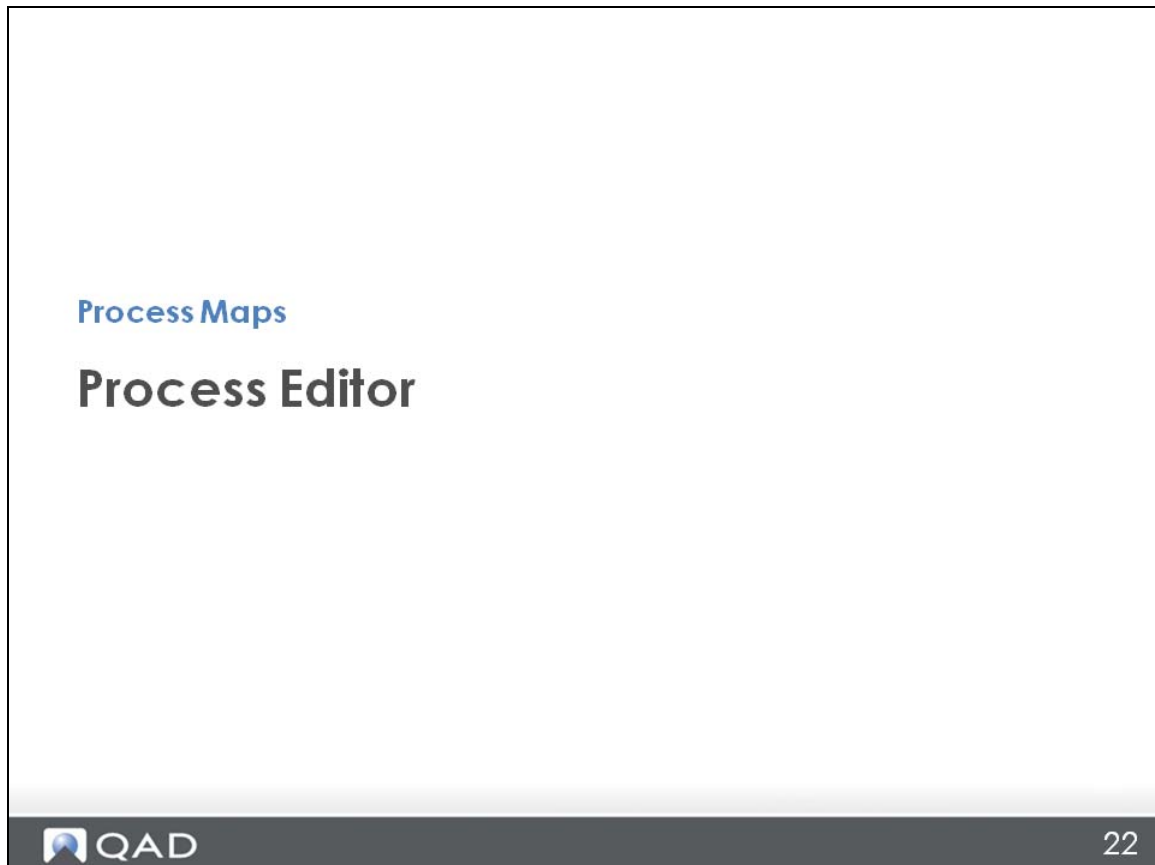
## Exercise

1. Open Processes/Process Maps.
2. Click Vertical Industry View.
3. Click the Food & Beverage node in the Vertical Industry View row.
4. Click through a few of the subprocesses.



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

**Introduction**

### Overview of Process Editor

The screenshot displays the QAD Process Editor interface. On the left, the 'Applications' menu is visible, with 'Administration' expanded to show 'Process Editor' highlighted. The main window shows a process map for 'Schedule Purchase Orders' under the 'Life Sciences BioPharma' category. The process map is divided into 'Planning and Scheduling' and 'Purchasing' stages. The 'Planning and Scheduling' stage includes 'Material Requirements Plan' and 'Determine Items To Purchase'. The 'Purchasing' stage includes 'Supplier Schedule Update', 'Place Purchase Requisition', and 'Manage Discrete Purchasing'. The process flow is as follows: 'Material Requirements Plan' leads to 'Determine Items To Purchase', which leads to a decision diamond 'Scheduled Item'. If 'Yes', it leads to 'Supplier Schedule Update'. If 'No', it leads to another decision diamond 'Place Purchase Requisition'. If 'Yes', it leads to 'Place Purchase Requisition'. If 'No', it leads to 'Manage Discrete Purchasing'. Below the process map, there are several icons for 'Operational Metrics', 'Compliance', 'Training', 'Manage Vendor Consigned Inventory', 'Collaborate With Supply Chain Partners', 'Manage Subcontract Purchasing', and 'Manage Kanban Purchasing'.

QAD 23

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

Introduction

# Process Editor

New Open Save Process Label Maintenance

Name  
Title  
Owner

Grid Properties  
Style Properties  
Process Properties  
Connector Properties  
Node Properties  
Row Properties

Designer Preview

	A	B	C	D	E	F
1						
2						
3						
4						
5						
6						

QAD 24

Open the map using the button in the upper left.

## Overview of Process Editor

**Introduction**

### Overview of Process Editor

The screenshot displays the QAD Process Editor interface. On the left, a sidebar lists various property categories: Title, Grid Properties, Style Properties, Process Properties, Connector Properties, Node Properties, and Row Properties. The main workspace is a grid with columns labeled A through E and rows labeled 1 through 5. The process flow is as follows:

- Cell A1:** Contains the text 'A1'.
- Cell B2:** Contains a rounded rectangle node labeled 'Material Requirements Plan'.
- Cell B3:** Contains the text 'B2'.
- Cell C2:** Contains a rounded rectangle node labeled 'Determine Items To Purchase'.
- Cell C3:** Contains a diamond-shaped decision node labeled 'Scheduled Item'.
- Cell C4:** Contains a diamond-shaped decision node labeled 'Place Purchase Requisition'.
- Cell D3:** Contains a rounded rectangle node labeled 'Supplier Schedule Update'.
- Cell D4:** Contains a rounded rectangle node labeled 'Place Purchase Requisition'.
- Cell D5:** Contains a rounded rectangle node labeled 'Manage Discrete Purchasing'.

Flow connections: An arrow points from 'Material Requirements Plan' (B2) to 'Determine Items To Purchase' (C2). From 'Determine Items To Purchase' (C2), an arrow points down to the 'Scheduled Item' decision (C3). From 'Scheduled Item' (C3), a 'Yes' path leads to 'Supplier Schedule Update' (D3), and a 'No' path leads to 'Place Purchase Requisition' (C4). From 'Place Purchase Requisition' (C4), a 'Yes' path leads to 'Place Purchase Requisition' (D4), and a 'No' path leads to 'Manage Discrete Purchasing' (D5).

**QAD** 25

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

**Introduction**

### Process Editor Demo

The screenshot displays the QAD Process Editor interface. On the left, there is a sidebar with the following fields and dropdown menus:

- Name: Plan\_4\_1
- Title: {SCHEDULE\_PURCHASE\_ORDERS}
- Owner: QAD
- Grid Properties
- Style Properties
- Process Properties
- Connector Properties
- Node Properties
- Row Properties

The main workspace is a grid with columns A through E and rows 1 through 6. The process flow is as follows:

- Row 2, Column A: Material Requirements Plan (Start)
- Row 2, Column C: Determine Items To Purchase
- Row 3, Column C: Scheduled Item (Decision)
- Row 3, Column E: Supplier Schedule Update (Yes path)
- Row 4, Column C: Place Purchase Requisition (No path)
- Row 4, Column E: Place Purchase Requisition (Yes path)
- Row 5, Column E: Manage Discrete Purchasing (No path)
- Row 6, Column A: Operational Metrics
- Row 6, Column B: Compliance
- Row 6, Column C: Training

The QAD logo is visible in the bottom left corner, and the page number 26 is in the bottom right corner.

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

### Introduction

## Process Editor Demo

**QAD** 27

This example adds a node for “Get Authorization.”

**Introduction**

## Process Editor Demo

The screenshot displays the QAD Process Editor interface. On the left is a properties panel for a node named 'Plan\_4\_1' with title '{SCHEDULE\_PURCHASE\_ORDERS}' and owner 'QAD'. The 'Node Properties' section is expanded, showing a dropdown menu for 'Shape' with options: Manual Operation, Manual Input, Multi Document, Document, and Automated Process. The 'Manual Operation' option is selected. The main workspace shows a process map on a grid with columns A-E and rows 1-6. The map includes nodes for 'Material Requirements Plan', 'Determine Items To Purchase', 'Get Authorization', 'Scheduled Item', 'Place Purchase Requisition', 'Supplier Schedule Update', 'Place Purchase Requisition', and 'Manage Discrete Purchasing'. The 'Get Authorization' node is highlighted with a yellow border. The 'Manual Operation' shape is also highlighted in the dropdown menu.

**QAD** 28

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

**Introduction**

## Process Editor Demo

The screenshot displays the QAD Process Editor interface. On the left is a property panel for 'Plan\_4\_1' with fields for Name, Title, Owner, Grid Pr, Style Pr, Process, Connec, Node Pr, Label, Tooltip, Link, Target, Image, Icon, Shape, Style, Background Color, and Dash Width. The main area is a grid-based process map with columns A-E and rows 1-6. The process flow is as follows:

- Row 2, Column A: Material Requirements Plan (Oval)
- Row 2, Column C: Determine Items To Purchase (Rectangle)
- Row 2, Column D: Get Authorization (Trapezoid, highlighted with a yellow border)
- Row 3, Column C: Scheduled Item (Diamond)
- Row 3, Column E: Supplier Schedule Update (Oval)
- Row 4, Column C: Place Purchase Requisition (Diamond)
- Row 4, Column E: Place Purchase Requisition (Oval)
- Row 5, Column E: Manage Discrete Purchasing (Oval)
- Row 6, Column A: Operational Metrics (Oval)
- Row 6, Column B: Compliance (Oval)
- Row 6, Column C: Training (Oval)

Flow connections: Material Requirements Plan → Determine Items To Purchase → Get Authorization → Scheduled Item. From Scheduled Item, a 'Yes' path leads to Supplier Schedule Update, and a 'No' path leads to Place Purchase Requisition. From Place Purchase Requisition, a 'Yes' path leads to Place Purchase Requisition, and a 'No' path leads to Manage Discrete Purchasing.

**QAD** 29

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

## Introduction

# Process Editor Demo

The screenshot displays the QAD Process Editor interface. On the left, a properties panel for the process 'Plan\_4\_1' is visible, showing fields for Name, Title, Owner, and various property categories. The 'Node Properties' section is expanded for the 'Get Authorization' node, showing its label and a list of links, including 'Form A'. The main area shows a process map on a grid with columns A-E and rows 1-6. The process flow starts with 'Material Requirements Plan' (A2), moves to 'Determine Items To Purchase' (C2), then to a decision 'Scheduled Item' (C3). From 'Scheduled Item', a 'Yes' path leads to 'Supplier Schedule Update' (E3), and a 'No' path leads to 'Place Purchase Requisition' (C4). From 'Place Purchase Requisition', a 'Yes' path leads to 'Place Purchase Requisition' (E4), and a 'No' path leads to 'Manage Discrete Purchasing' (E5). The 'Get Authorization' node (D2) is highlighted with a yellow border. The bottom of the interface features the QAD logo and the page number 30.

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

**Introduction**

## Process Editor Demo

The screenshot displays the QAD Process Editor interface. It features a grid with columns labeled A through E and rows labeled 1 through 6. The process map is as follows:

- Row 1:** Column C contains 'Planning and Scheduling'; Column E contains 'Purchasing'.
- Row 2:** Column A contains 'Material Requirements Plan' (oval); Column C contains 'Determine Items To Purchase' (rectangle); Column D contains 'Get Authorization' (trapezoid).
- Row 3:** Column C contains 'Scheduled Item' (diamond); Column E contains 'Supplier Schedule Update' (oval). An arrow points from 'Scheduled Item' to 'Supplier Schedule Update' with the label 'Yes'.
- Row 4:** Column C contains 'Place Purchase Requisition' (diamond); Column E contains 'Place Purchase Requisition' (oval). An arrow points from 'Place Purchase Requisition' to 'Place Purchase Requisition' with the label 'Yes'.
- Row 5:** Column E contains 'Manage Discrete Purchasing' (oval). An arrow points from 'Place Purchase Requisition' (Row 4) to 'Manage Discrete Purchasing' with the label 'No'.
- Row 6:** Column A contains 'Operational Metrics' (oval); Column B contains 'Compliance' (oval); Column C contains 'Training' (oval).

A yellow box highlights the area from Row 2 to Row 5 and Column C to Column E. A mouse cursor is positioned over a plus sign icon in the left margin of Row 3.

**QAD** 31

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

**Introduction**

## Process Editor Demo

The screenshot displays the QAD Process Editor interface. On the left is a properties panel for a process named 'Plan\_4\_1' with title '{SCHEDULE\_PURCHASE\_ORDERS}' and owner 'QAD'. The properties panel includes sections for Grid, Style, Process, Connector, Node, and Row properties. The Connector Properties section is expanded, showing options for Label, Link, Target (Current Window), Shape (Bottom Elbow Arrow), Style (Connector), and Dash Width (0).

The main area shows a process map on a grid with columns A through E and rows 1 through 6. The map is divided into two main sections: 'Planning and Scheduling' (columns C and D) and 'Purchasing' (column E). The process flow is as follows:

- Material Requirements Plan** (Oval) in cell (2, A) connects to **Determine Items To Purchase** (Rectangle) in cell (2, C).
- Determine Items To Purchase** connects to **Get Authorization** (Trapezoid) in cell (2, D).
- Get Authorization** connects to **Scheduled Item** (Diamond) in cell (4, C) via a yellow connector.
- Scheduled Item** has a 'Yes' path to **Supplier Schedule Update** (Oval) in cell (4, E).
- Scheduled Item** has a 'No' path to **Place Purchase Requisition** (Diamond) in cell (5, C).
- Place Purchase Requisition** has a 'Yes' path to **Place Purchase Requisition** (Oval) in cell (5, E).
- Place Purchase Requisition** has a 'No' path to **Manage Discrete Purchasing** (Oval) in cell (6, E).

The QAD logo is visible in the bottom left corner, and the page number '32' is in the bottom right corner.

And then add an elbow connector.

### Introduction

# Process Editor Demo

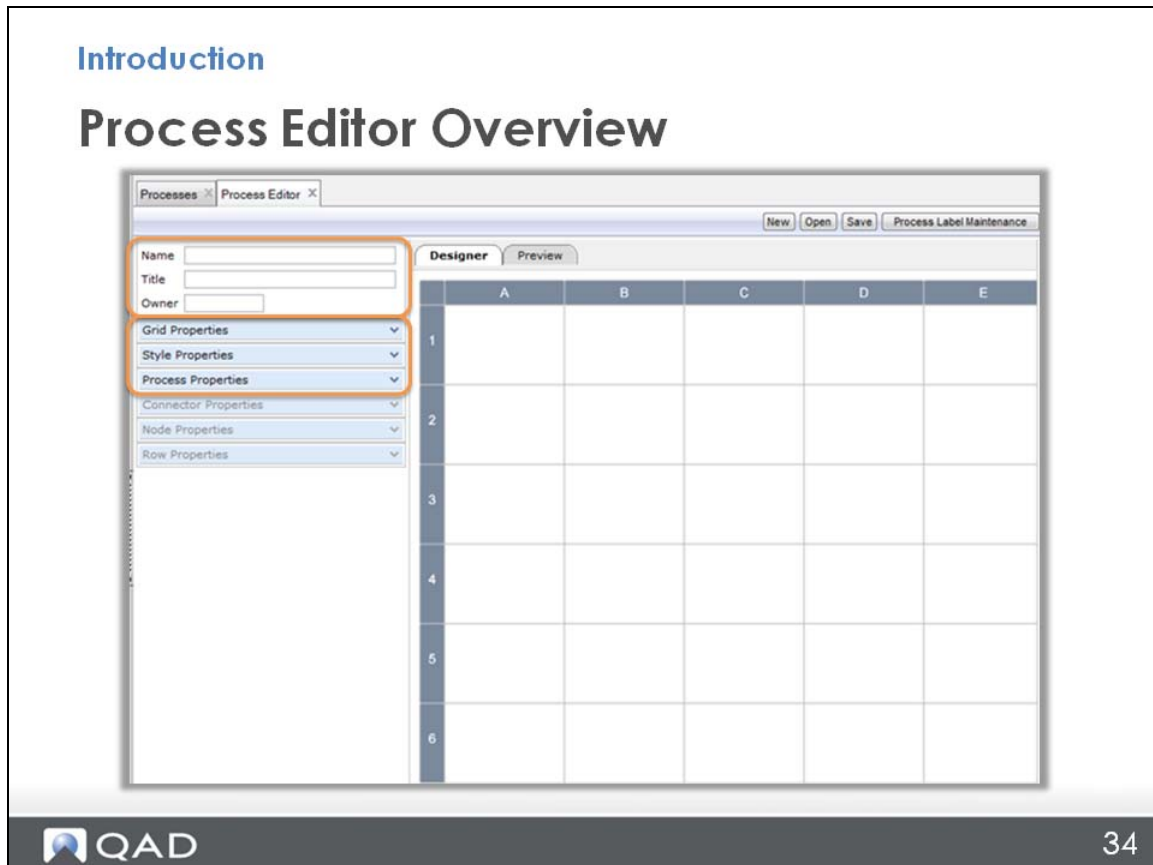
The screenshot displays the QAD Process Editor interface for the 'Schedule Purchase Orders' process. The interface includes a top menu with 'Designer' and 'Preview' tabs, a language dropdown set to 'English', and a zoom level of 110%. The process flow is as follows:

- Material Requirements Plan** (Start) leads to **Determine Items To Purchase** (Task).
- Determine Items To Purchase** leads to **Get Author** (Task).
- Get Author** is linked to **Form A** and **Form B** (Forms).
- Get Author** leads to **Scheduled Item** (Decision).
- Scheduled Item** (Yes) leads to **Supplier Schedule Update** (Task).
- Scheduled Item** (No) leads to **Place Purchase Requisition** (Task).
- Place Purchase Requisition** (Yes) leads to **Place Purchase Requisition** (Task).

QAD 33

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

## Process Editor Overview



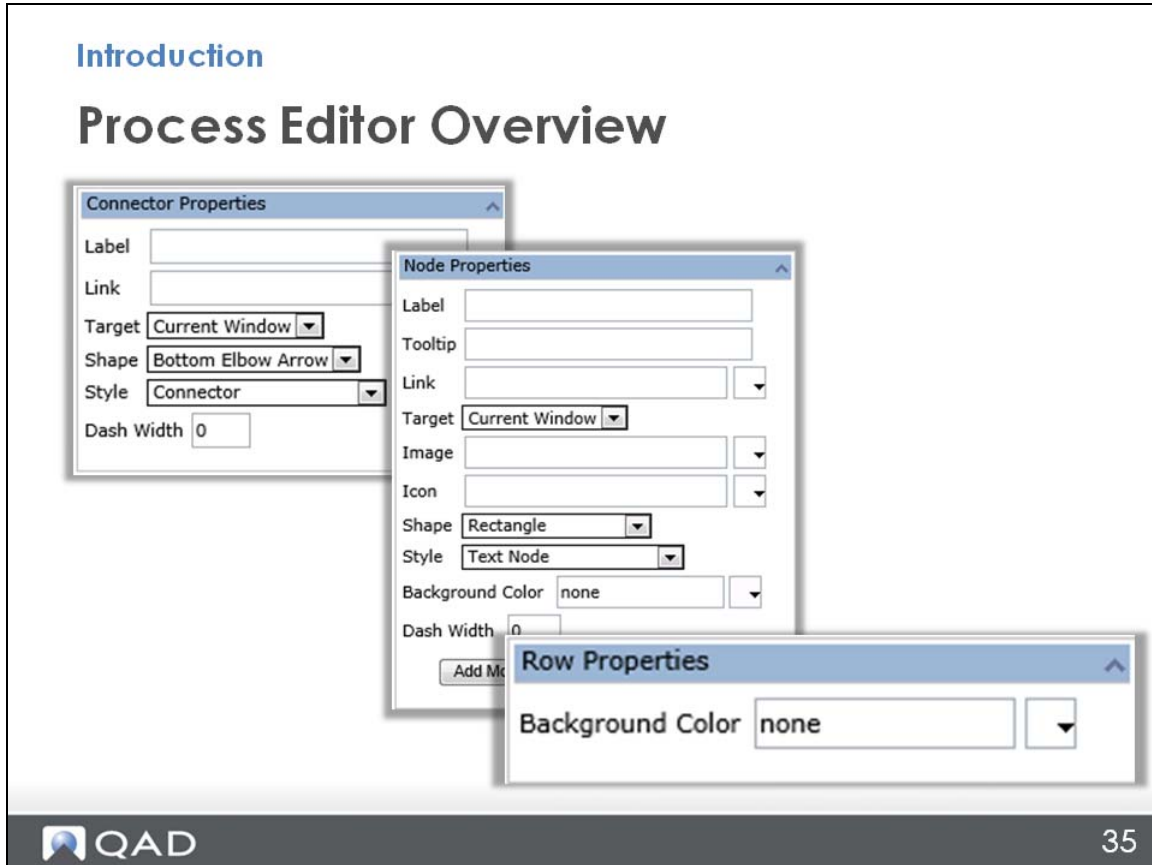
To make these edits, you use some of the menus on the left.

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.



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

### Introduction

## Assignment and Next Step

- Assignment:
  1. Look around at the existing process maps
  2. Open one you will use in your work
  3. Open some of the links
  4. Open the map in the Process Editor
- Next module: "How to Create a Process Map"



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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.

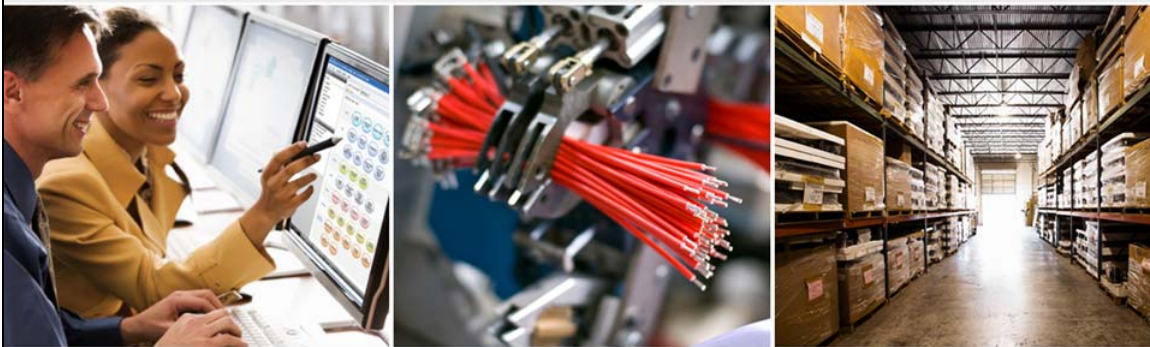


Chapter 2

# How to Create a Process Map

## Process Editor Training

# How to Create a Process Map



Our Passion. Your Advantage.

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:

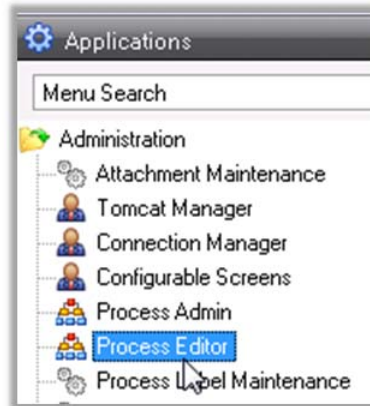
<https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?id=22506432648>

## Locating the Process Map Editor

### Process Editor

## Locating the Process Map Editor

Go to Administration → Process 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

**Process Editor**

### Demo: How to Create Simple Map

The screenshot displays the QAD Process Editor application. On the left is a navigation pane with a tree view under 'Applications' containing items like 'Attachment Maintenance', 'Tomcat Manager', 'Connection Manager', 'Configurable Screens', 'Process Admin', 'Process Editor', 'Process Label Maintenance', and 'Execute Document Import'. Below this is a 'Favorites' section with instructions. The main workspace is titled 'Process Editor' and contains a 'Process Label Maintenance' window. This window has a 'Designer' tab active, showing a blank grid with 4 rows and 3 columns labeled A, B, and C. The grid is currently empty, ready for a process map to be created.

Applications

Menu Search

- Administration
  - Attachment Maintenance
  - Tomcat Manager
  - Connection Manager
  - Configurable Screens
  - Process Admin
  - Process Editor
  - Process Label Maintenance
  - Execute Document Import

Favorites

Select your favorite application from the Applications menu and drag it into this window to save it.

Processes x Process Editor x Process Editor x

New Open Save Process Label Maintenance

Name

Title

Owner

Grid Properties

Style Properties

Process Properties

Connector Properties

Node Properties

Row Properties

Designer Preview

	A	B	C
1			
2			
3			
4			

QAD 3

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

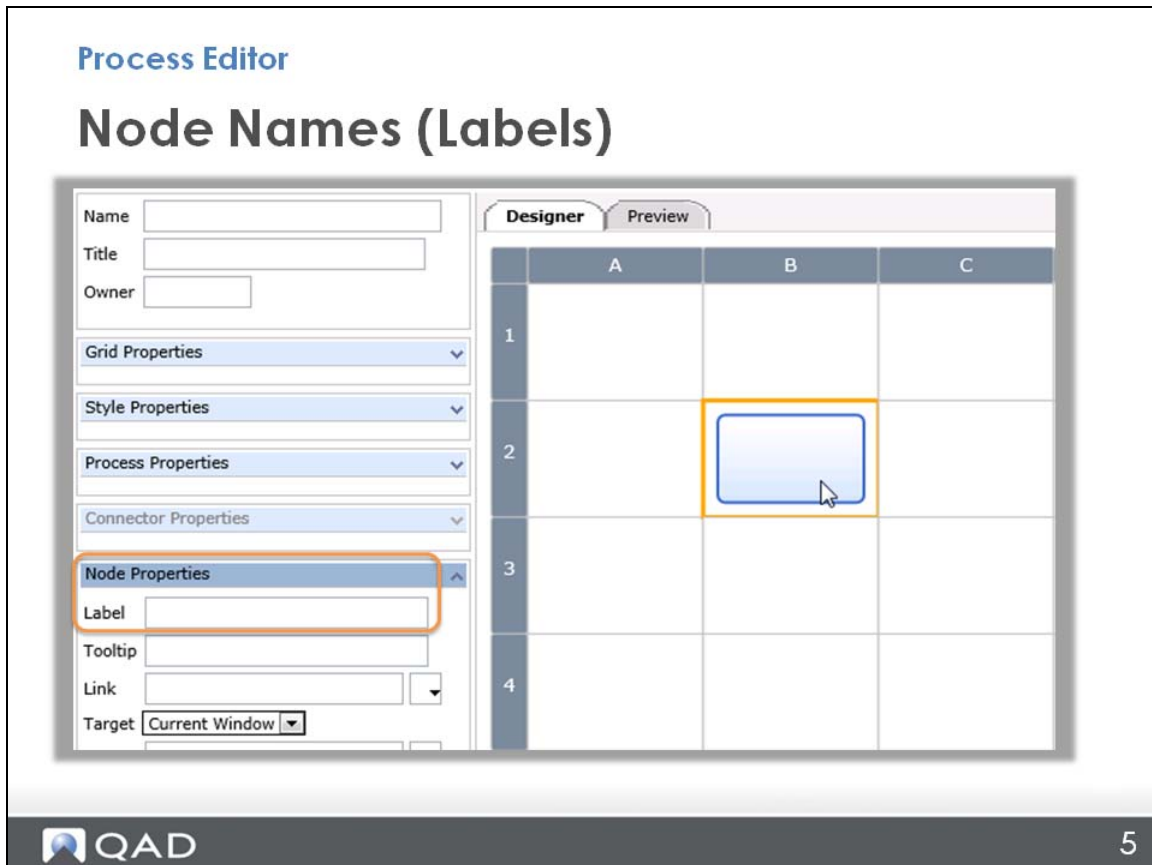
## Nodes

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

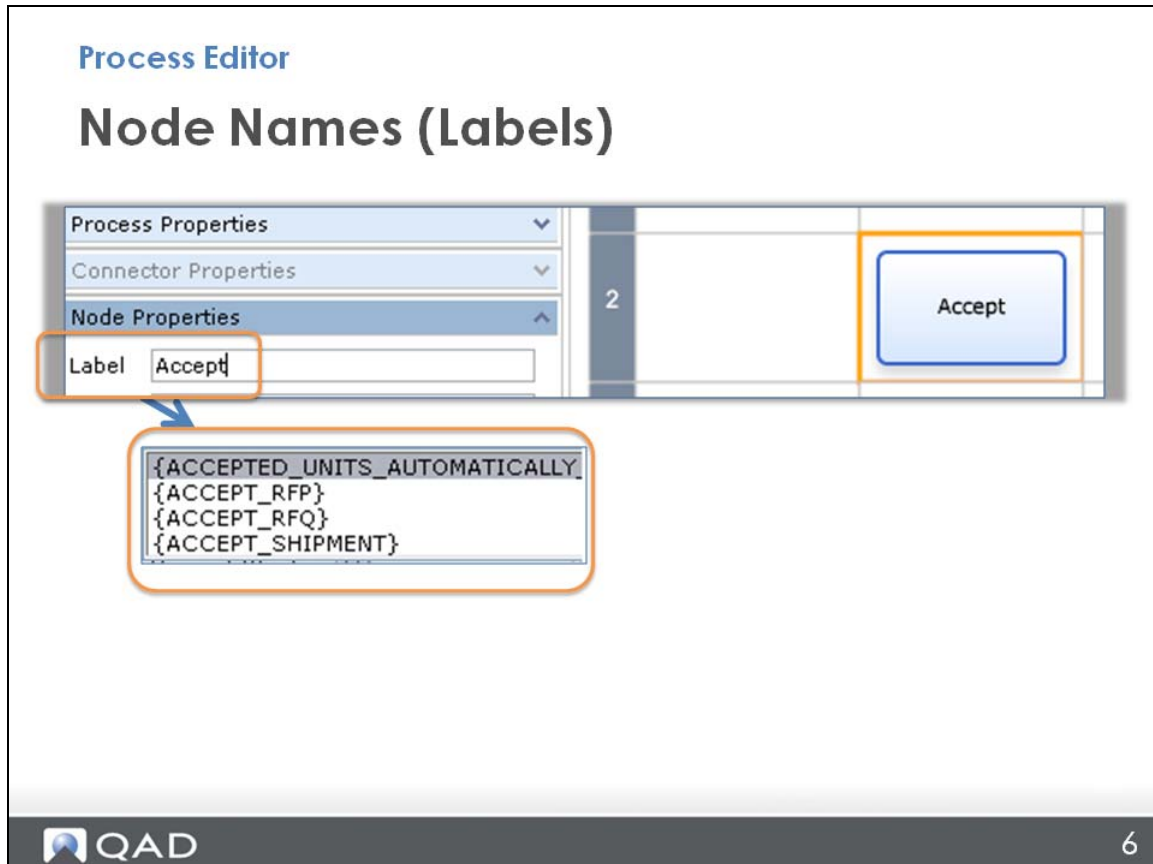
Later, you will learn how to make nodes of different shapes and colors, but for now, just use this. When you click the cell, the Node Properties section on the left side opens.

**Important** 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)

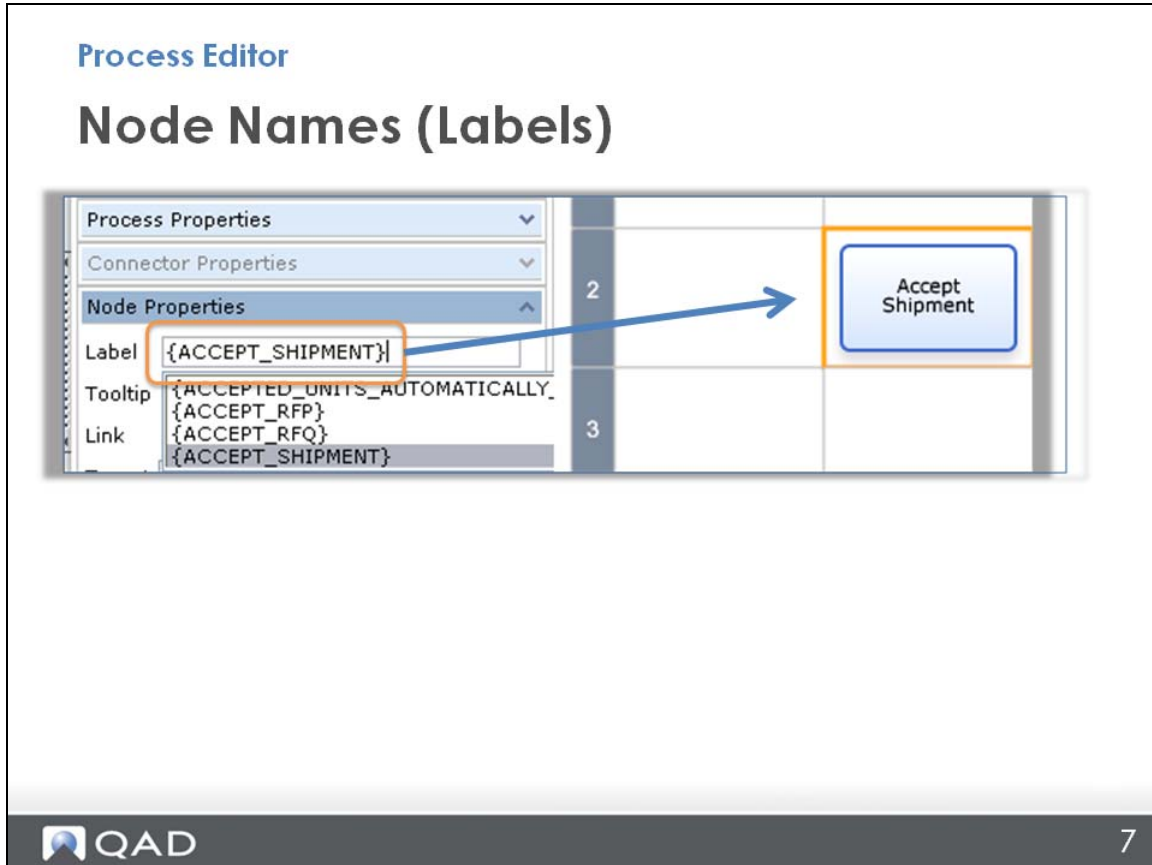


From there, name the node using the Label field. Rather than just creating any name you like, it is a good idea to search first to see if there is already a label name for what you are trying to set up. That way, you stay organized and do not end up with several similar labels representing the same thing.



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.”




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.

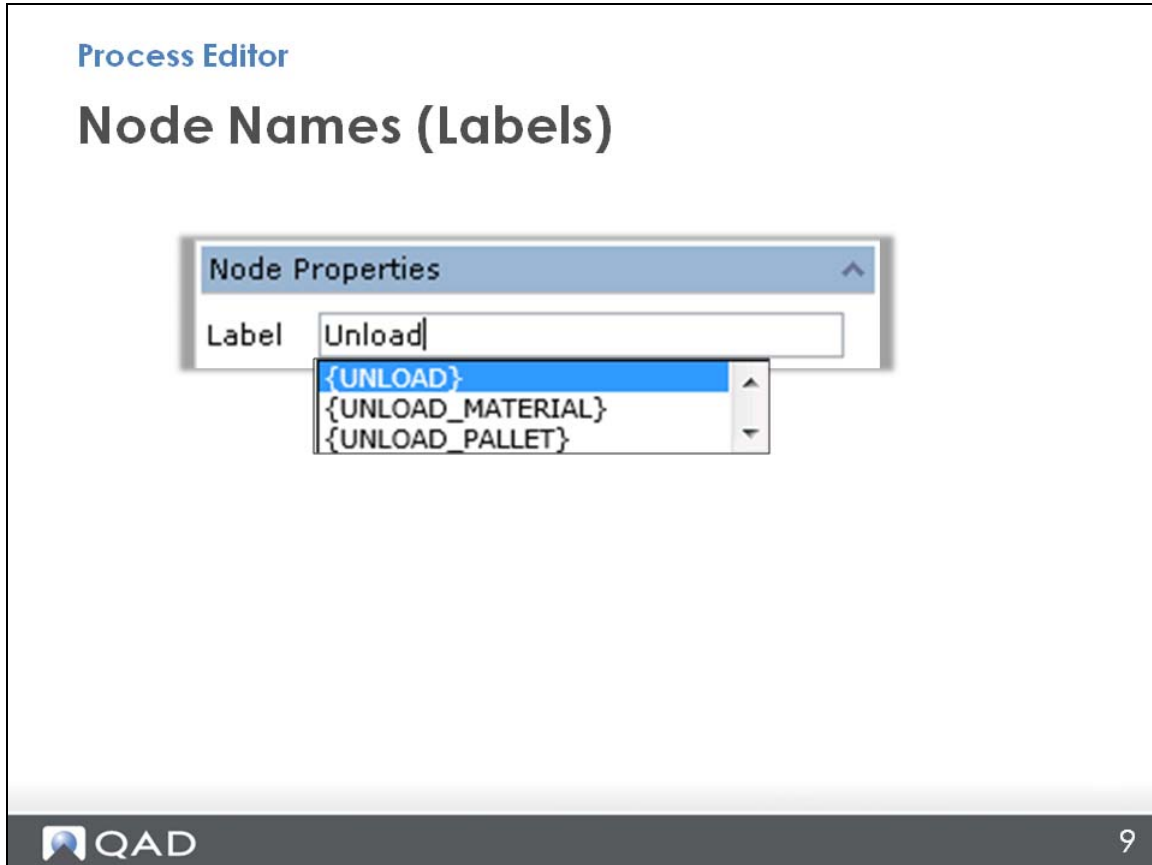
**Process Editor**

## Node Names (Labels)

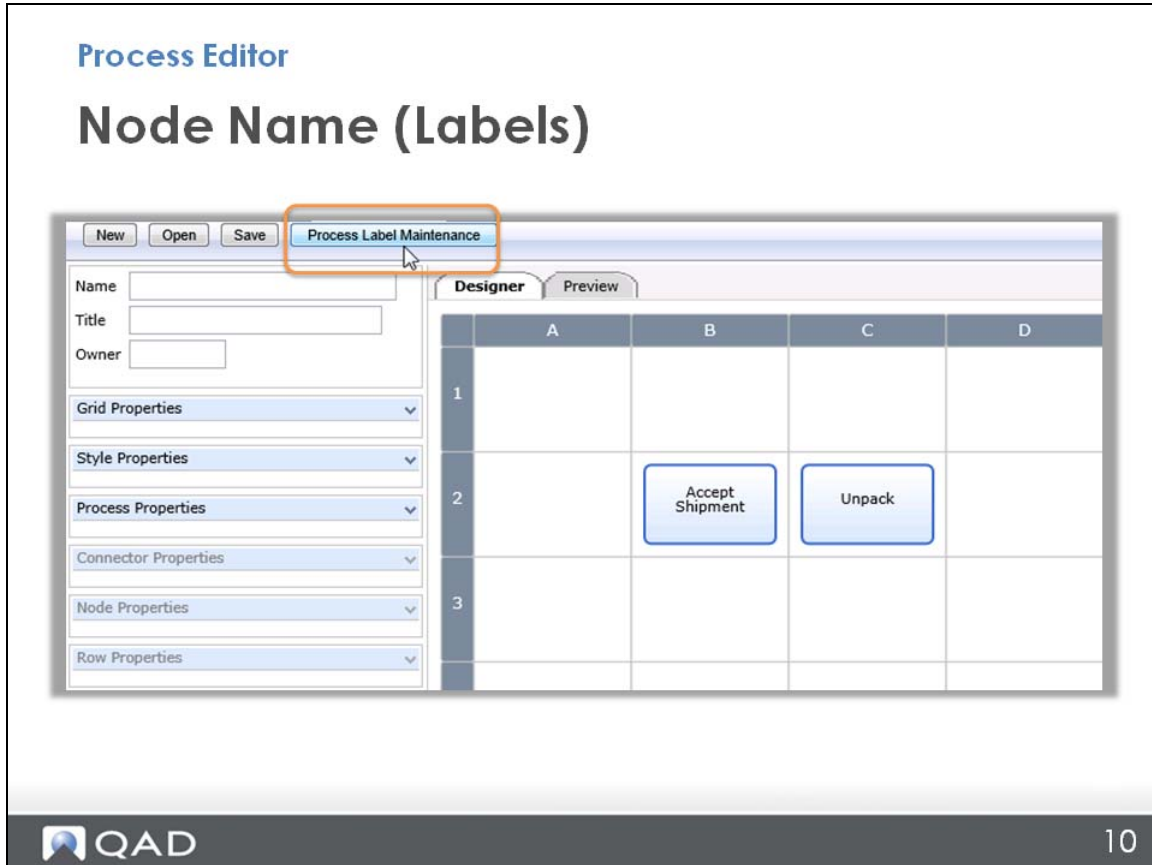


The screenshot displays the QAD Process Editor interface. On the left, a sidebar contains three expandable sections: 'Process Properties', 'Connector Properties', and 'Node Properties'. The 'Node Properties' section is expanded, showing a 'Label' field with the text 'Unpack' and a 'Tooltip' field. The main workspace shows a process map with two nodes: 'Accept Shipment' and 'Unpack'. The 'Unpack' node is highlighted with an orange border. The number '2' is visible in the workspace area. The QAD logo and the number '8' are located in the bottom left and right corners of the interface, respectively.

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?”



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.



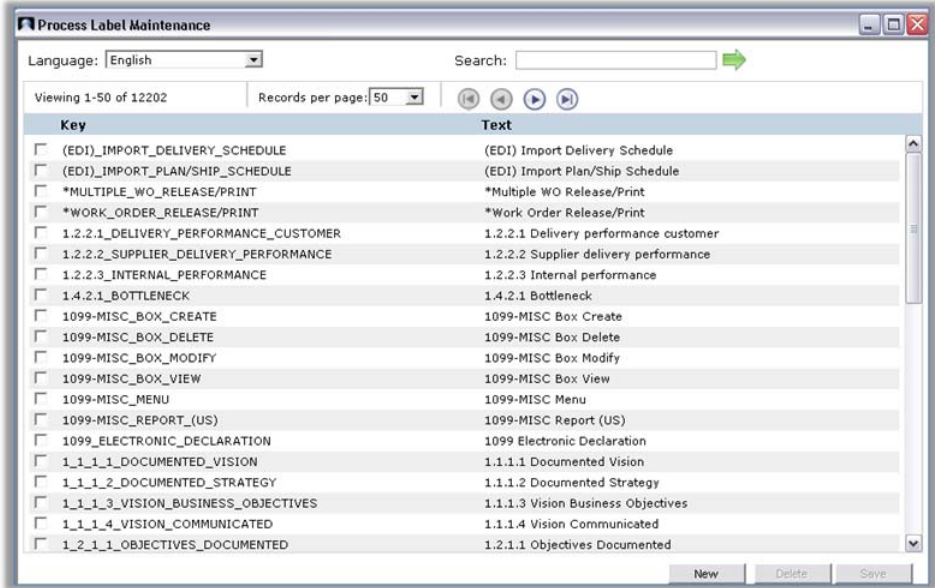
But what if you really want to use the word “Unpack”? It does not exist as a standard term, so you could just type it in as the label and make the node name. But there’s a better way than just letting everyone go around naming the nodes anyway they want. If you did it that way, you would have an unorganized,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

**Process Editor**

### Process Label Maintenance



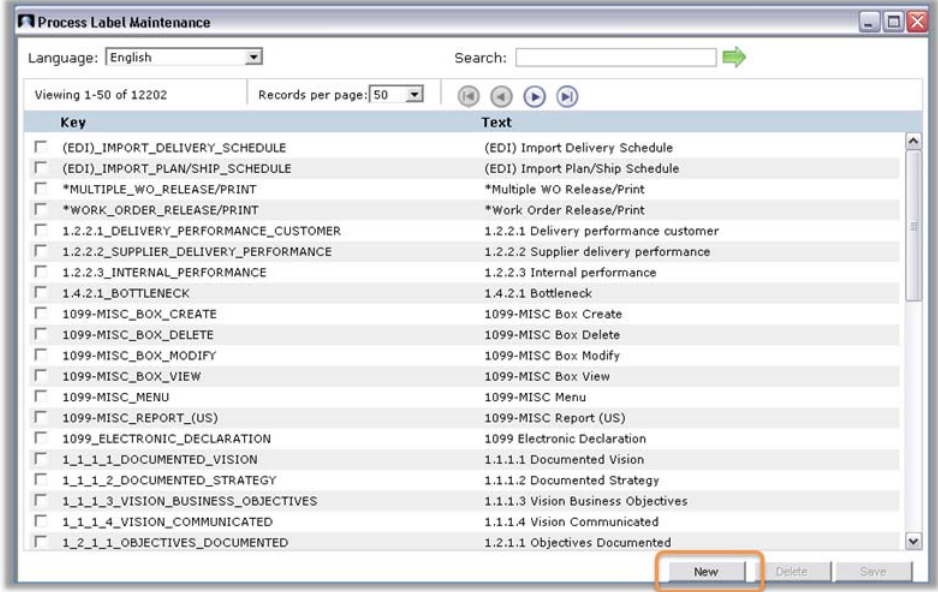
Key	Text
<input type="checkbox"/> (EDI)_IMPORT_DELIVERY_SCHEDULE	(EDI) Import Delivery Schedule
<input type="checkbox"/> (EDI)_IMPORT_PLAN/SHIP_SCHEDULE	(EDI) Import Plan/Ship Schedule
<input type="checkbox"/> *MULTIPLE_WO_RELEASE/PRINT	*Multiple WO Release/Print
<input type="checkbox"/> *WORK_ORDER_RELEASE/PRINT	*Work Order Release/Print
<input type="checkbox"/> 1.2.2.1_DELIVERY_PERFORMANCE_CUSTOMER	1.2.2.1 Delivery performance customer
<input type="checkbox"/> 1.2.2.2_SUPPLIER_DELIVERY_PERFORMANCE	1.2.2.2 Supplier delivery performance
<input type="checkbox"/> 1.2.2.3_INTERNAL_PERFORMANCE	1.2.2.3 Internal performance
<input type="checkbox"/> 1.4.2.1_BOTTLENECK	1.4.2.1 Bottleneck
<input type="checkbox"/> 1099-MISC_BOX_CREATE	1099-MISC Box Create
<input type="checkbox"/> 1099-MISC_BOX_DELETE	1099-MISC Box Delete
<input type="checkbox"/> 1099-MISC_BOX_MODIFY	1099-MISC Box Modify
<input type="checkbox"/> 1099-MISC_BOX_VIEW	1099-MISC Box View
<input type="checkbox"/> 1099-MISC_MENU	1099-MISC Menu
<input type="checkbox"/> 1099-MISC_REPORT_(US)	1099-MISC Report (US)
<input type="checkbox"/> 1099_ELECTRONIC_DECLARATION	1099 Electronic Declaration
<input type="checkbox"/> 1.1.1.1_DOCUMENTED_VISION	1.1.1.1 Documented Vision
<input type="checkbox"/> 1.1.1.2_DOCUMENTED_STRATEGY	1.1.1.2 Documented Strategy
<input type="checkbox"/> 1.1.1.3_VISION_BUSINESS_OBJECTIVES	1.1.1.3 Vision Business Objectives
<input type="checkbox"/> 1.1.1.4_VISION_COMMUNICATED	1.1.1.4 Vision Communicated
<input type="checkbox"/> 1.2.1.1_OBJECTIVES_DOCUMENTED	1.2.1.1 Objectives Documented

QAD 11

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 Editor**

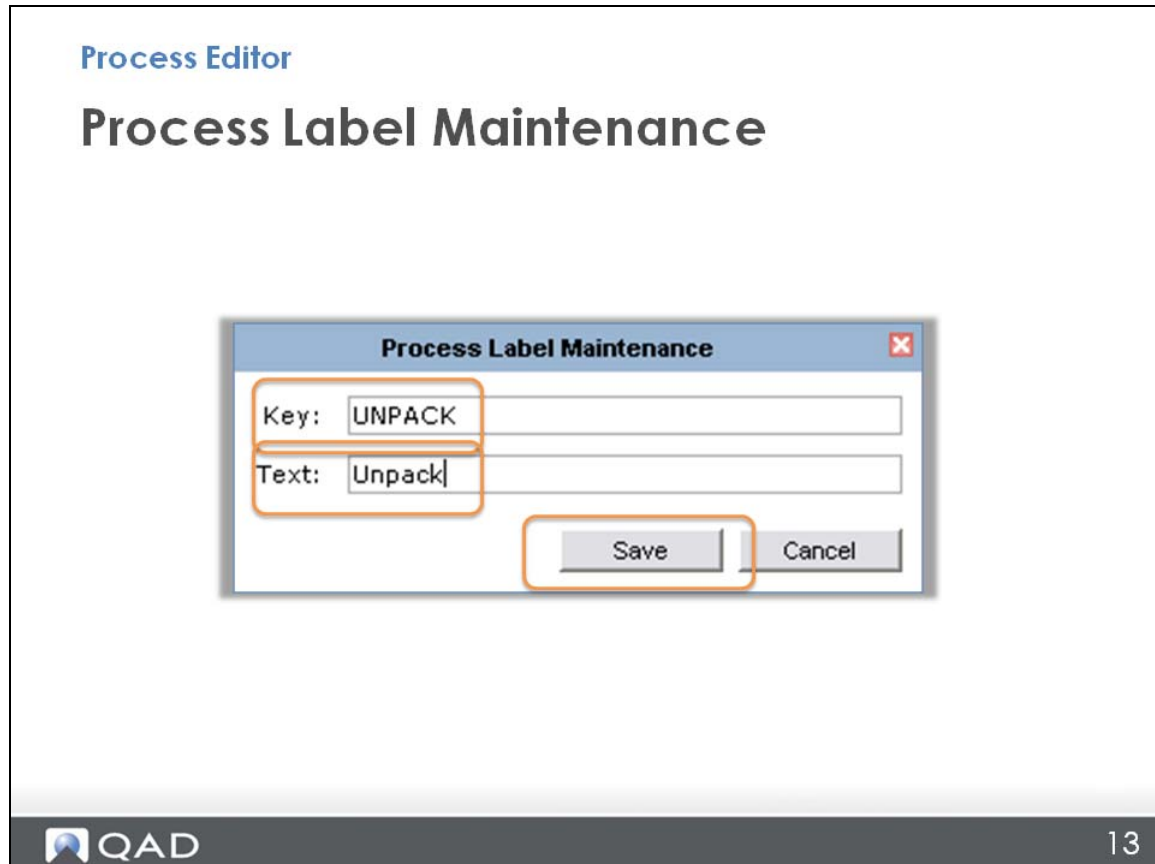
## Process Label Maintenance



The screenshot displays the 'Process Label Maintenance' window. At the top, there is a 'Language' dropdown set to 'English' and a 'Search' field with a green arrow button. Below this, it indicates 'Viewing 1-50 of 12202' records and 'Records per page: 50'. The main area is a table with two columns: 'Key' and 'Text'. The table contains various process labels, such as '(ED1)\_IMPORT\_DELIVERY\_SCHEDULE' and '1.2.2.1\_DELIVERY\_PERFORMANCE\_CUSTOMER'. At the bottom right of the window, there are three buttons: 'New', 'Delete', and 'Save'. The 'New' button is highlighted with an orange rectangular box.

Key	Text
<input type="checkbox"/> (ED1)_IMPORT_DELIVERY_SCHEDULE	(ED1) Import Delivery Schedule
<input type="checkbox"/> (ED1)_IMPORT_PLAN/SHIP_SCHEDULE	(ED1) Import Plan/Ship Schedule
<input type="checkbox"/> *MULTIPLE_WO_RELEASE/PRINT	*Multiple WO Release/Print
<input type="checkbox"/> *WORK_ORDER_RELEASE/PRINT	*Work Order Release/Print
<input type="checkbox"/> 1.2.2.1_DELIVERY_PERFORMANCE_CUSTOMER	1.2.2.1 Delivery performance customer
<input type="checkbox"/> 1.2.2.2_SUPPLIER_DELIVERY_PERFORMANCE	1.2.2.2 Supplier delivery performance
<input type="checkbox"/> 1.2.2.3_INTERNAL_PERFORMANCE	1.2.2.3 Internal performance
<input type="checkbox"/> 1.4.2.1_BOTTLENECK	1.4.2.1 Bottleneck
<input type="checkbox"/> 1099-MISC_BOX_CREATE	1099-MISC Box Create
<input type="checkbox"/> 1099-MISC_BOX_DELETE	1099-MISC Box Delete
<input type="checkbox"/> 1099-MISC_BOX_MODIFY	1099-MISC Box Modify
<input type="checkbox"/> 1099-MISC_BOX_VIEW	1099-MISC Box View
<input type="checkbox"/> 1099-MISC_MENU	1099-MISC Menu
<input type="checkbox"/> 1099-MISC_REPORT_(US)	1099-MISC Report (US)
<input type="checkbox"/> 1099_ELECTRONIC_DECLARATION	1099 Electronic Declaration
<input type="checkbox"/> 1.1.1.1_DOCUMENTED_VISION	1.1.1.1 Documented Vision
<input type="checkbox"/> 1.1.1.2_DOCUMENTED_STRATEGY	1.1.1.2 Documented Strategy
<input type="checkbox"/> 1.1.1.3_VISION_BUSINESS_OBJECTIVES	1.1.1.3 Vision Business Objectives
<input type="checkbox"/> 1.1.1.4_VISION_COMMUNICATED	1.1.1.4 Vision Communicated
<input type="checkbox"/> 1.2.1.1_OBJECTIVES_DOCUMENTED	1.2.1.1 Objectives Documented

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



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.

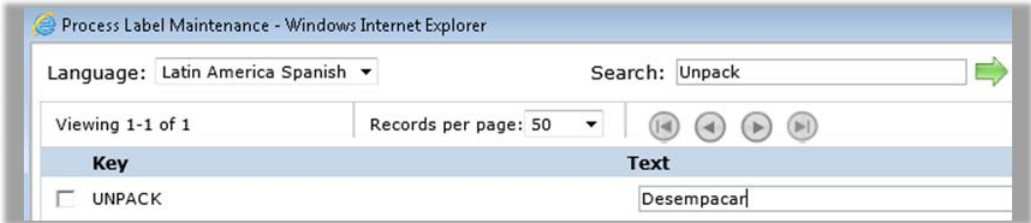
Also, avoid using any special characters; use only letters and the underscore.

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 Editor**

## Process Label Maintenance

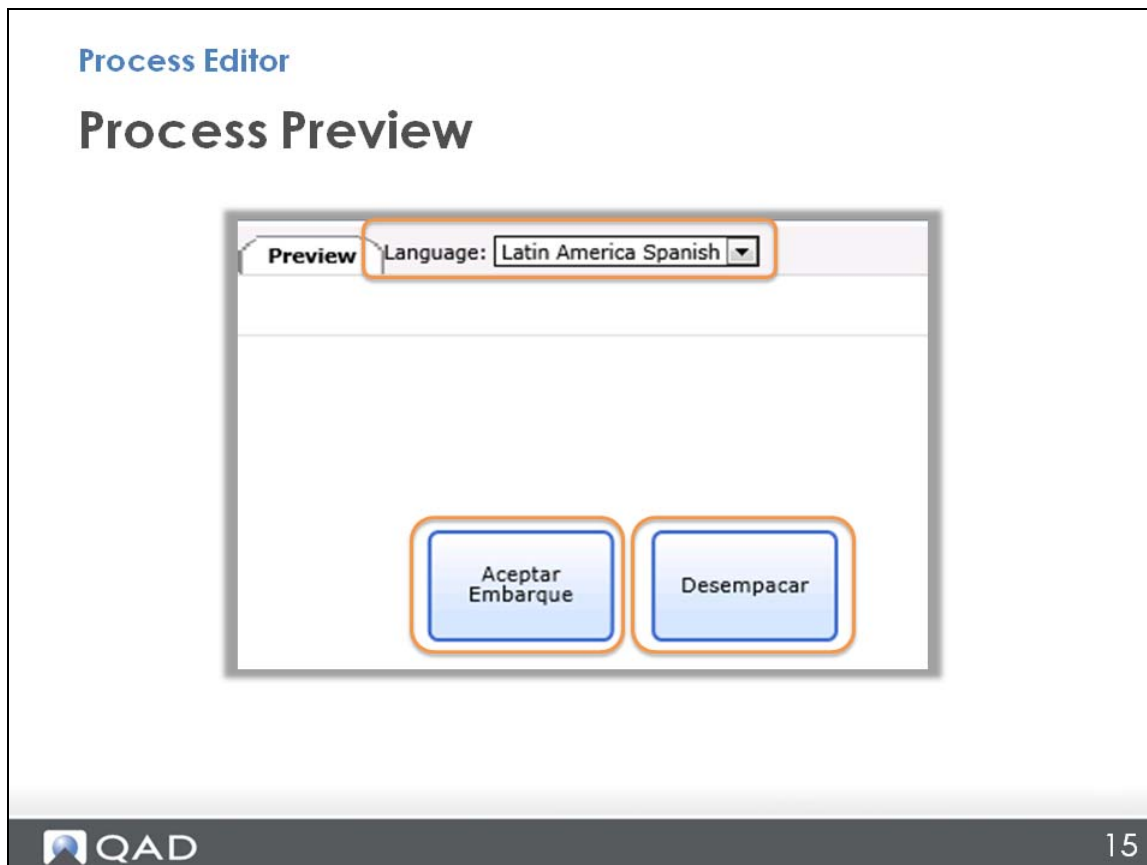


Key	Text
<input type="checkbox"/> UNPACK	Desempacar

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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

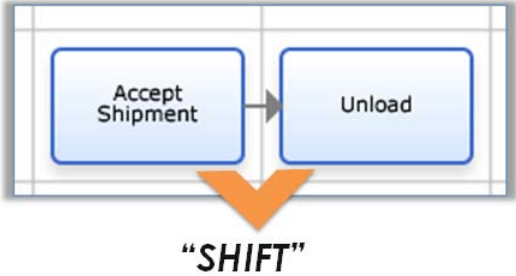
The screenshot shows a software interface titled "Process Editor" and "Process Label Maintenance". It features a flow diagram with five rectangular boxes representing process steps. The first box on the left is highlighted with a blue border and contains the Google logo, a "Translate" button, and a text input field containing the word "Word". Below this box are two more boxes: one for Spanish labeled "palabra" and one for French labeled "parole". To the right of these are two more boxes: one for German labeled "Wort" and one for Polish labeled "słowo". The flow starts with the English word "Word" and branches into Spanish, French, German, and Polish translations. At the bottom left is the QAD logo, and at the bottom right is the number "16".

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

Process Editor

### Connectors



The diagram illustrates the process of connecting two nodes in a process map. Two blue rounded rectangular nodes are shown side-by-side: 'Accept Shipment' on the left and 'Unload' on the right. A straight black arrow points from the right side of the 'Accept Shipment' node to the left side of the 'Unload' node. Below this arrow, a large orange arrow points downwards towards the word 'SHIFT' in quotes, indicating that holding the Shift key is required to create this type of connector.

QAD

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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

### Process Editor

## Guidelines for Naming Nodes

- Use an existing label when possible
- Try a few different search words
- Remember word order is important
- Use the down arrow key to choose the label name from the available list (not the mouse cursor)



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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.

### Process Editor

## Guidelines for Naming Nodes

- New names = Process Label Maintenance
- Use uppercase letters
- Use a single underscore instead of a space
- Do not use symbols, just letters and numbers
  - Correct: FINANCE\_AND\_ACCOUNTING
  - Incorrect: FINANCE\_&\_ACCOUNTING



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.

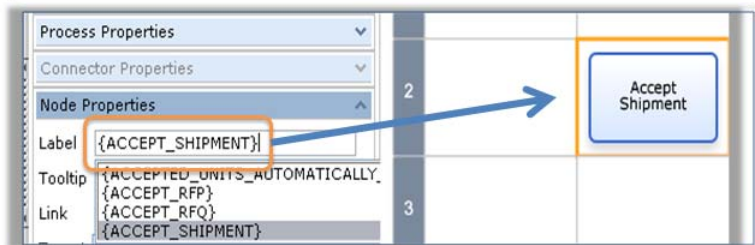
The first example here is correct, but the second one is not.

## Exercise: Creating Node

### Process Editor

## Exercise: Creating Nodes

1. Open the Process Editor (Admin/Process Editor).
2. Click in a cell to create a node.
3. In the Label field, enter the word "Accept" and search for the name "Accept Shipment."



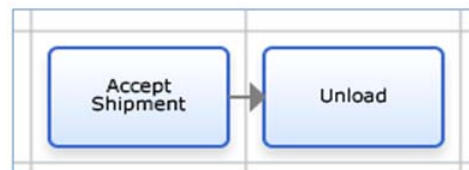
To test your knowledge so far, do this exercise about creating and connecting nodes. If you do not find the label "ACCEPT\_SHIPMENT," remember to create it in Process Label Maintenance and then choose it from the dropdown list in Node Properties. The exercise is continued on the next page.

## 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.

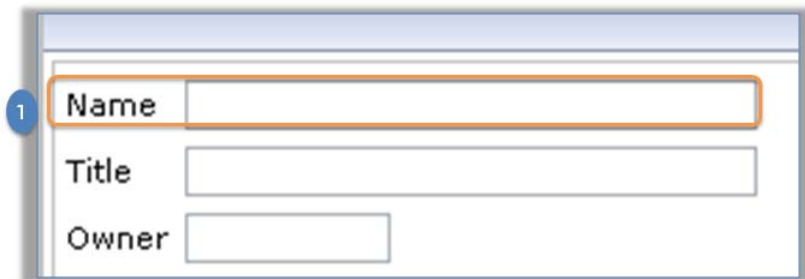


## Naming a Process Map

### Process Editor

## Naming a Process Map

1. Name: Follow naming convention
  - Differentiate yours from QAD standard maps
  - Identify your company, department, process
  - Do not use spaces – just underscore lines



A screenshot of a software interface titled 'Process Editor'. It contains a form with three input fields: 'Name', 'Title', and 'Owner'. The 'Name' field is highlighted with a blue circle containing the number '1' and an orange border. The 'Title' and 'Owner' fields are also present but not highlighted.

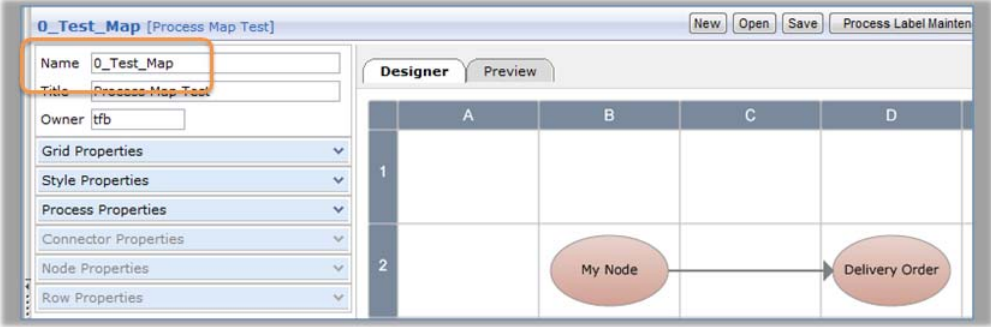
Now, it is time to name the process map and save it.

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

**Process Editor**

### Naming Conventions



OUR\_SALES\_ORDER\_CREATE

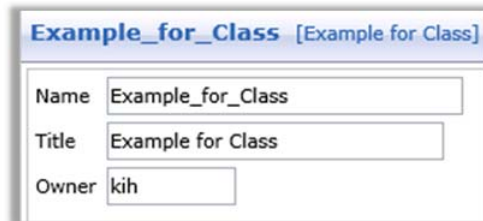
INTERNAL\_SALES\_ORDER\_PRINT

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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\_.”

## Process Editor

## Naming Conventions



The screenshot shows a window titled "Example\_for\_Class [Example for Class]". Inside the window, there are three input fields:

Name	Example_for_Class
Title	Example for Class
Owner	kih

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

## Naming a Process Map

### Process Editor

## Naming a Process Map

1. Name: Follow naming convention
2. Title: Provide a map description
3. Owner: Enter an owner ID



A screenshot of a software interface titled "Process Editor". It shows a form with three input fields. The first field is labeled "Name" and is empty. The second field is labeled "Title" and is empty; it is highlighted with an orange border and a blue circle containing the number "2" to its left. The third field is labeled "Owner" and is empty; it is highlighted with an orange border and a blue circle containing the number "3" to its left.

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

The screenshot displays the QAD Process Editor interface. At the top, the title bar reads "Process Editor" and "Saving a Process Map". Below this, the main window title is "Example\_for\_Class [Example for Class]". The toolbar contains buttons for "New", "Open", "Save", and "Process Label Maintenance". The "Save" button is highlighted with an orange circle. The interface is divided into two main sections: "Designer" and "Preview". The "Designer" section on the left contains property panels for "Grid Properties", "Style Properties", "Process Properties", "Connector Properties", and "Node Properties". The "Preview" section on the right shows a grid with columns labeled A, B, C, and D, and rows labeled 1, 2, and 3. In the grid, there are two process steps: "Accept Shipment" in cell B2 and "Unload" in cell C2. The QAD logo and the number "26" are visible in the bottom right corner of the screenshot.

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

### Process Editor

## How to Create a Simple Process Map

1. Click on cell to make a node
2. Name the node - search for existing label
3. Create a second node & name it using Process Label Maintenance
4. Connect the nodes
5. Name the map
6. Save the map



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

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



## Review (Quiz)

### Process Editor

## Review (Quiz)

How do you ...

1. ... open the Process Editor?
2. ... create a node?
3. ... search for an existing name/label for a node?
4. ... create a new name/label for a node?
5. ... connect two nodes?
6. ... name a map?
7. ... save a map?



Before concluding this section, answer these questions.

Your answers:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

## Answers: How to Create Simple Map

### Process Editor

## Answers: How to Create Simple Map

1. Open the Process Editor from the Admin menu.
2. To create a node, click on a cell.
3. Search for an existing name/label in Node Properties in the Label field. Type the desired name and use the down arrow on the keyboard to see the available list of similar names.
4. To create a new name, either type it in the Label field or use Process Label Maintenance to create a name key.



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

**Note** 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

### Process Editor

## How to Create a Simple Map

5. To connect nodes, click the first node, press the Shift key, click the second node, and release the Shift key.
6. To name a map, type it in the Name field following the naming convention and using underscore lines instead of blanks. Optionally, enter a title and owner.
7. To save a map, click the Save button in the upper left section of the screen.

And the rest of the answers.

## Assignment

### Process Editor

## Assignment

1. Add a third node to the map you started and label it "Move to Hold Area."
2. Connect the second and third nodes.
3. Name and save the map.



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Here is your next assignment:

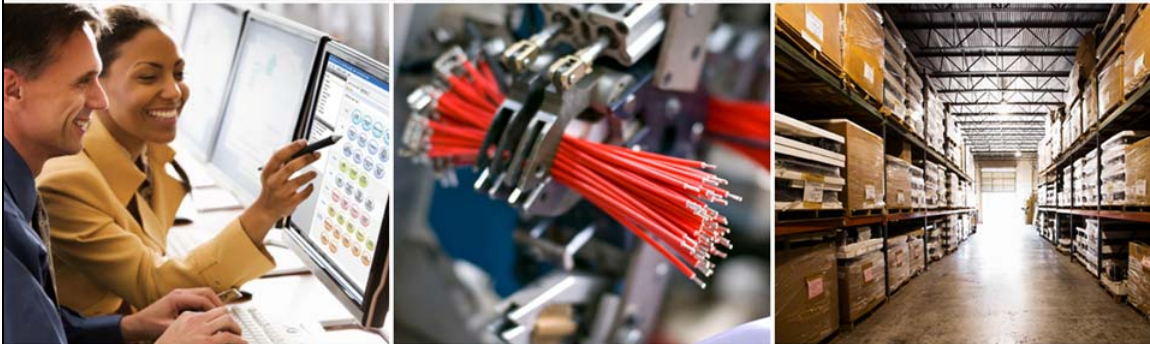
- 1 Add a third node to the map you started earlier and name it "Move to Hold Area."
- 2 Connect the second and third nodes.
- 3 Name and save the map.



# Nodes

## Process Editor Training

### Nodes



Our Passion. Your Advantage.

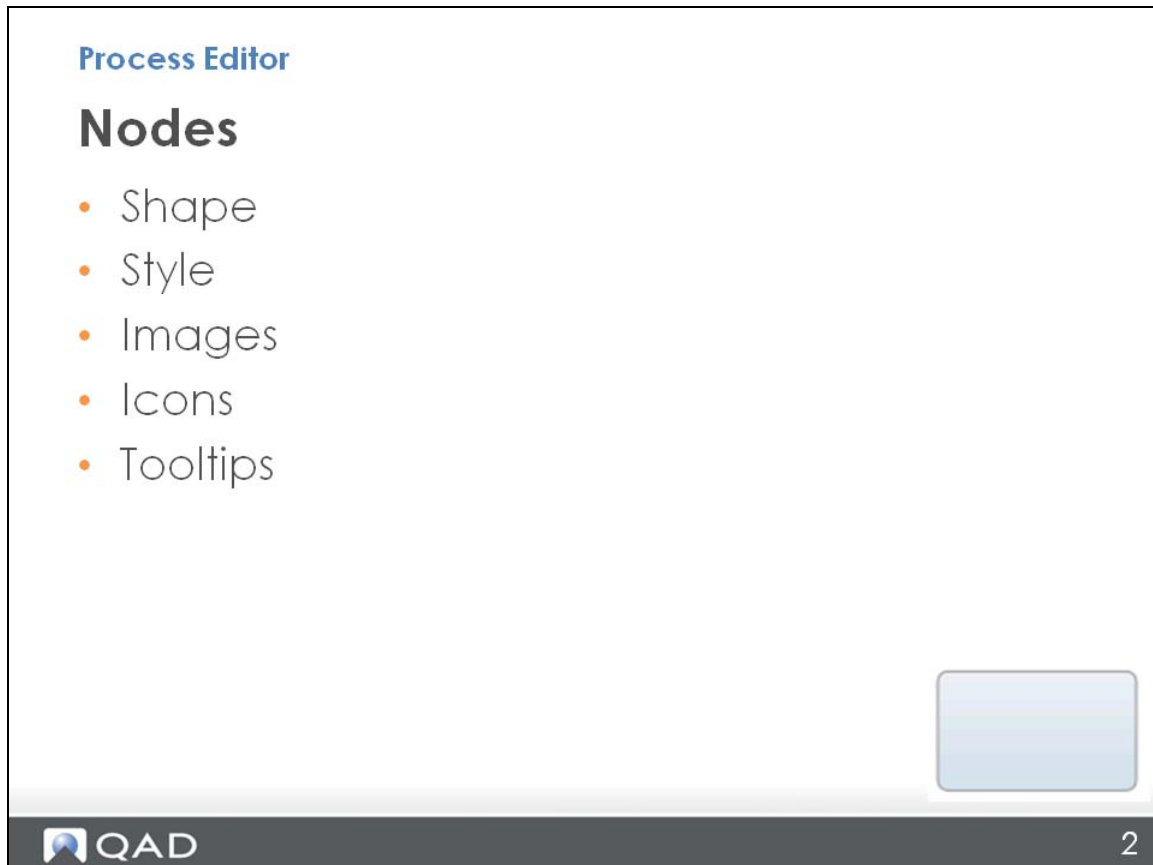
This section presents the different options available for designing nodes.

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:

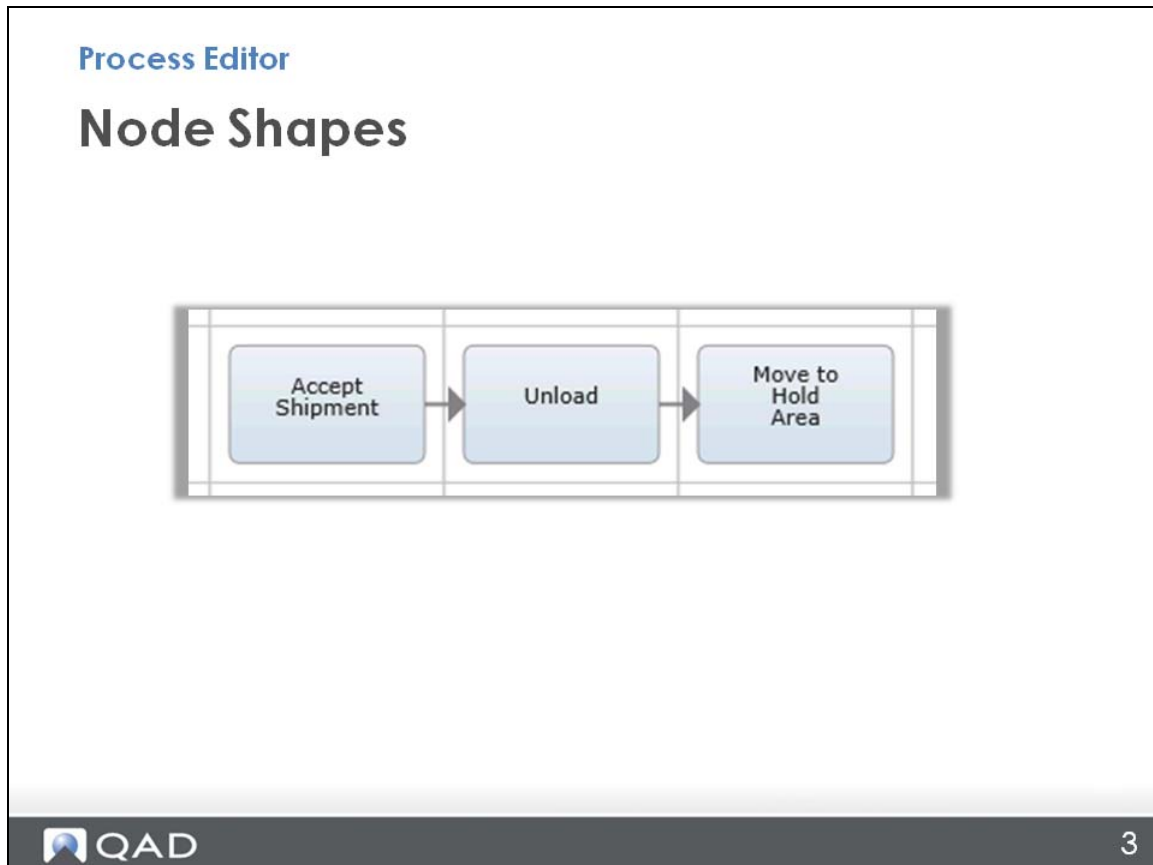
<https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?id=22506432649>

## Nodes



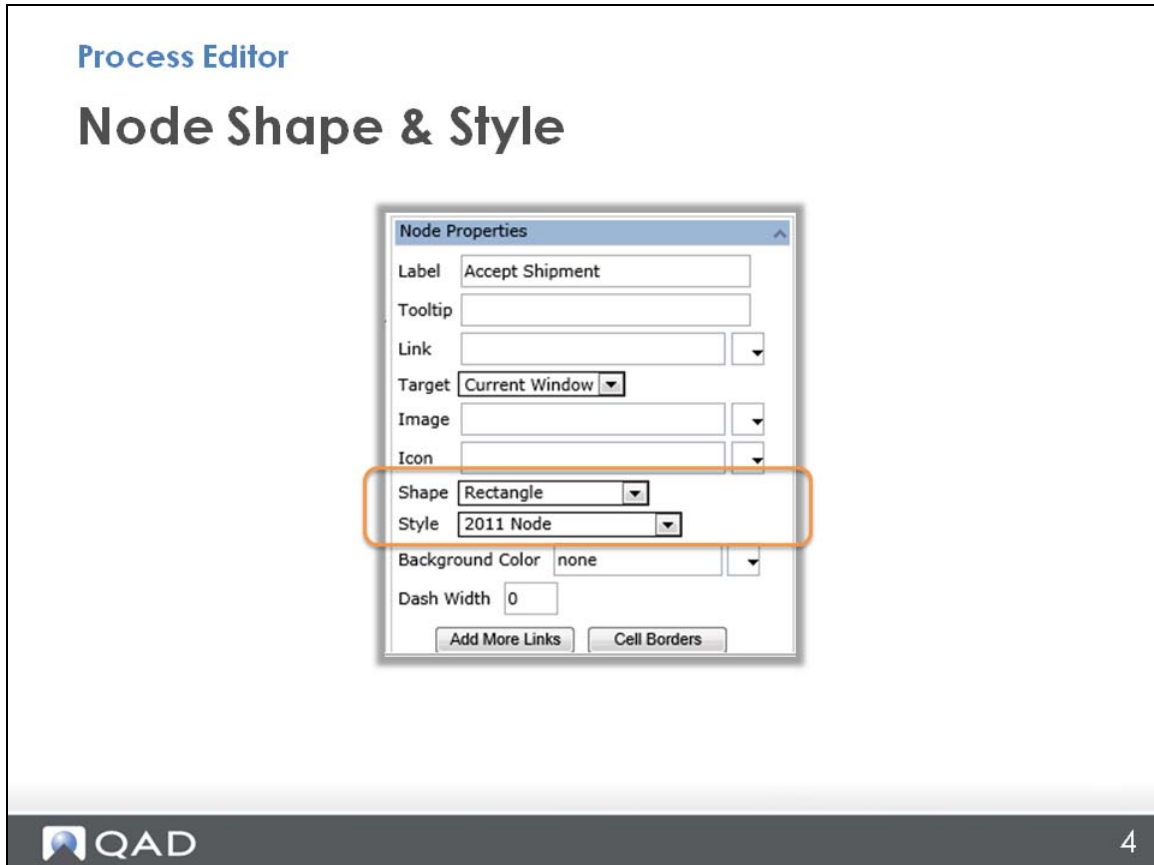
You can change their shape and style; you can change them into images, add icons to them (like a logo, for example), and tooltips, which are words that can appear when you hover your mouse over them. You can also add links to nodes, but these are discussed in a separate section of this training.

## Node Shapes



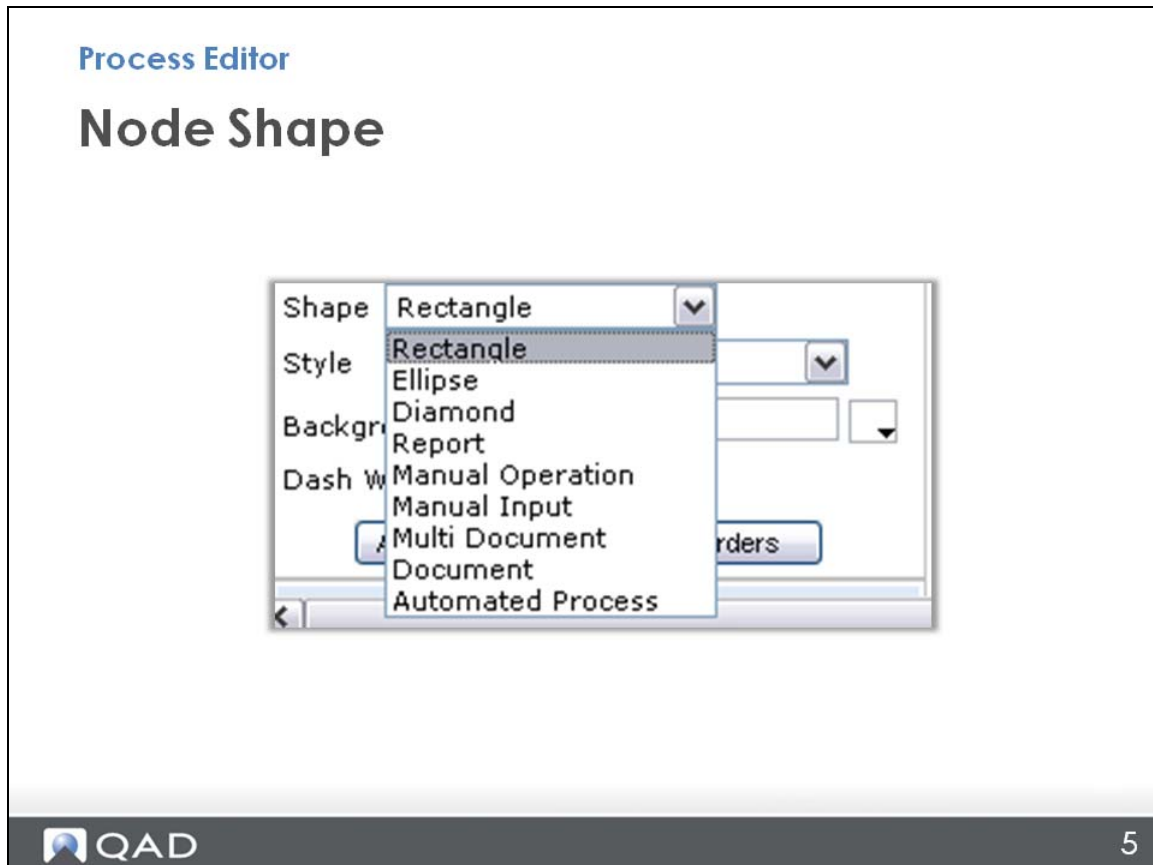
Until now, this training has been limited to creating nodes in their default style, which is a blue rectangle. Now you will see how to change the shapes and colors of the nodes to reflect what the node actually represents.

## Node Shape & Style

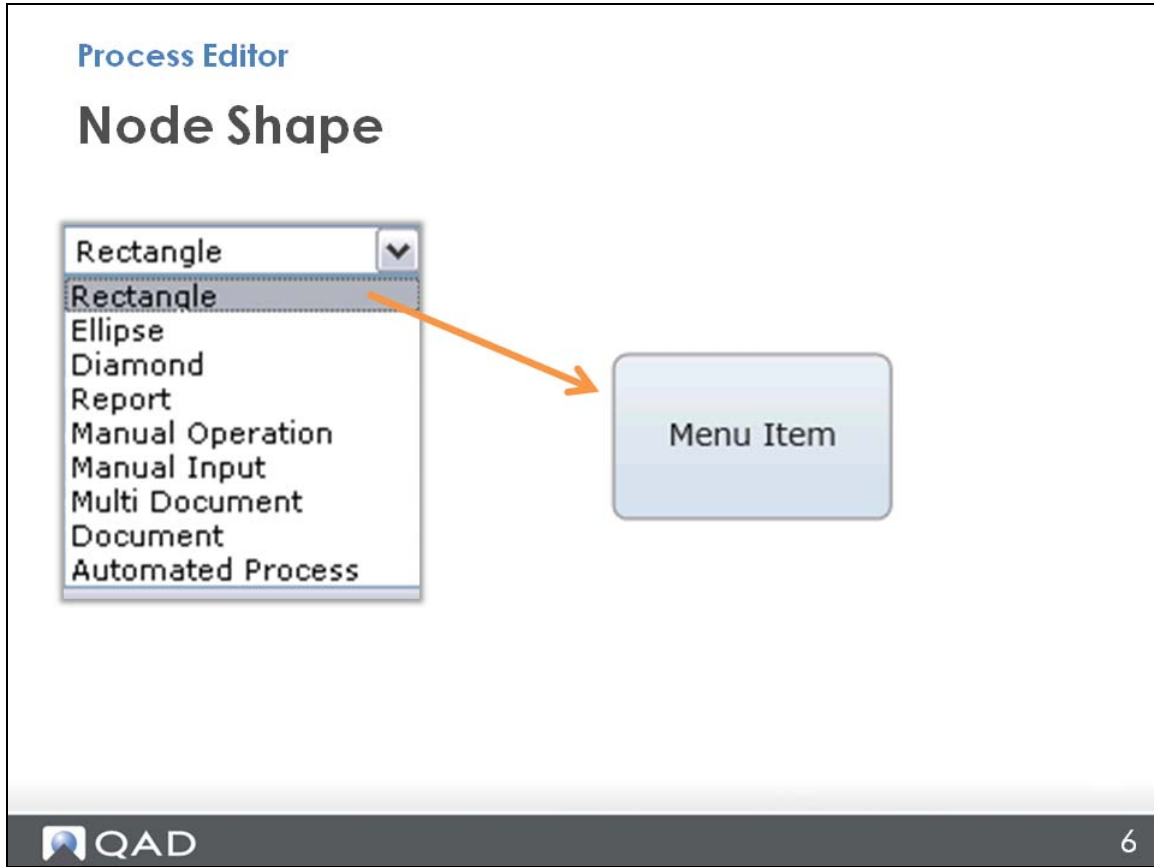


As you know, when you click on a cell and create a node, the Node Properties menu opens on the left. Look down where it says Shape and Style.

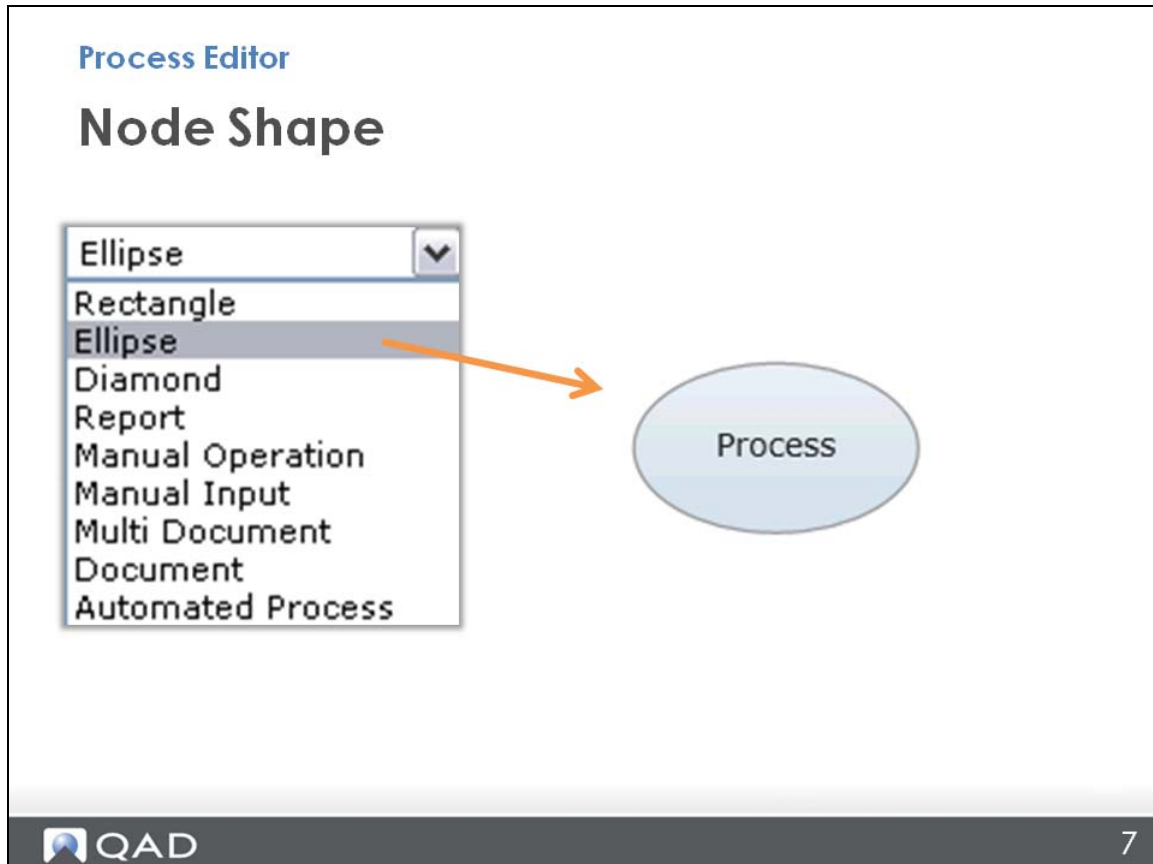
## Node Shape



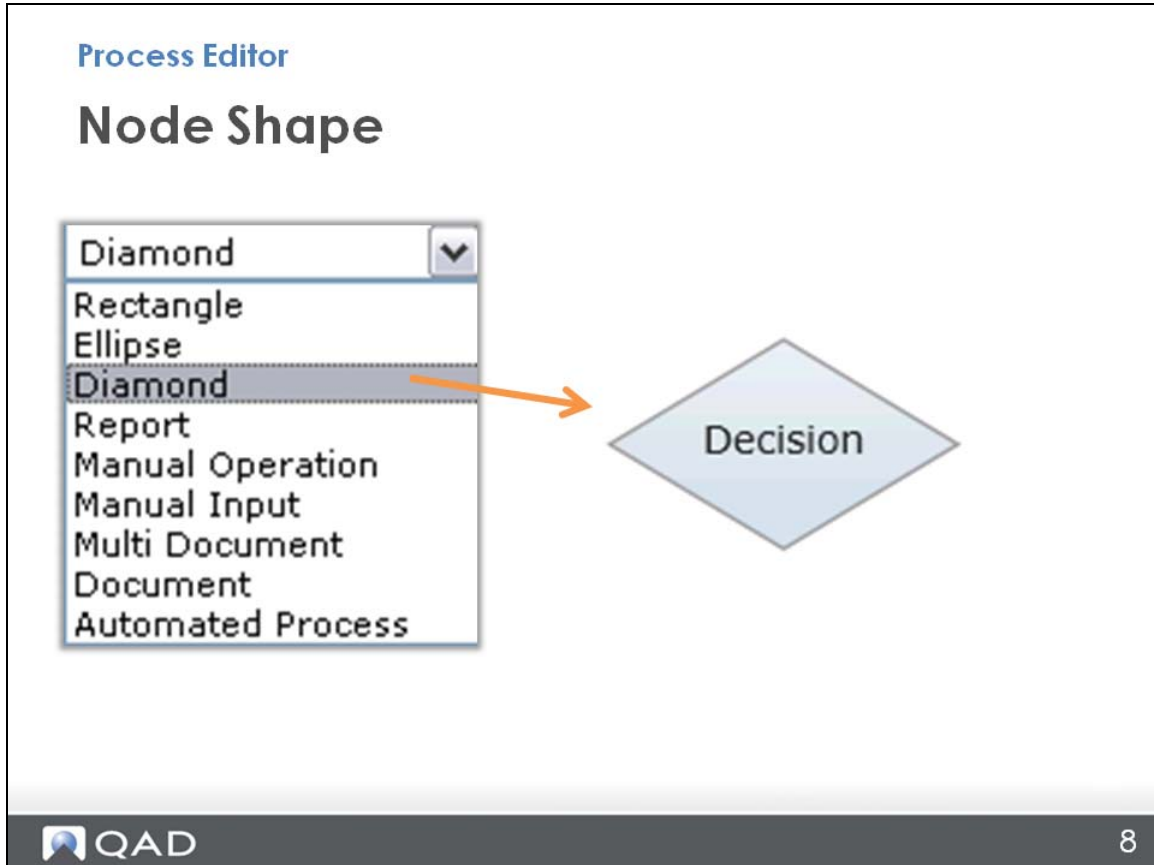
These are the available shapes, including rectangles, diamonds, and shapes that represent documents and processes.



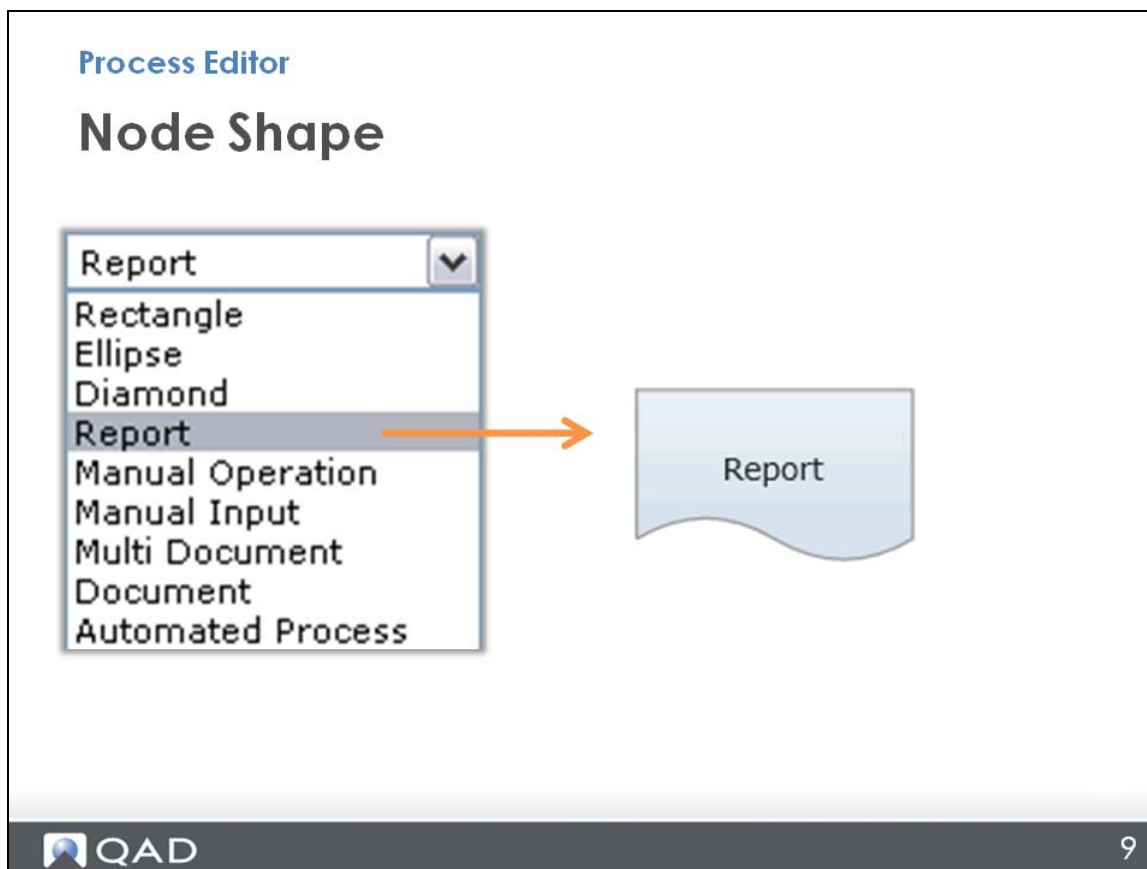
A rectangle represents a menu item and links to a QAD program.



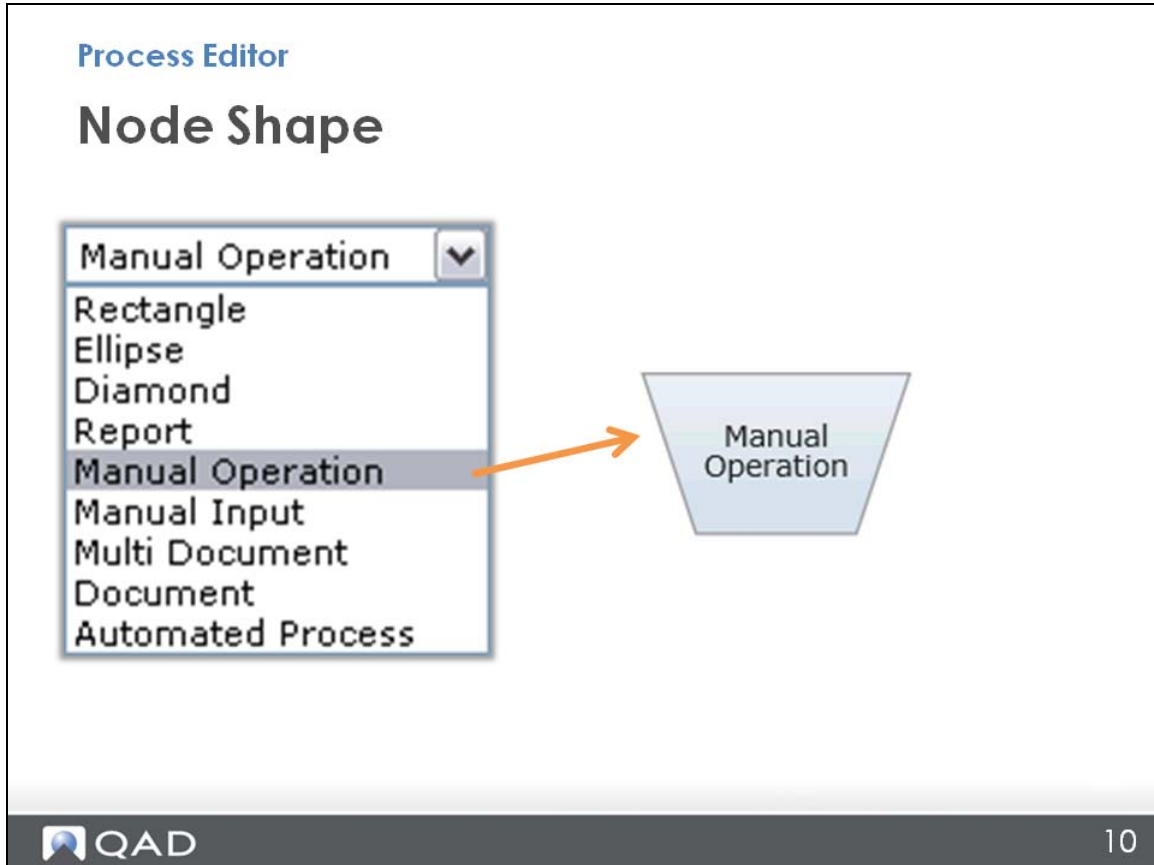
An ellipse represents a process and links to another process map.



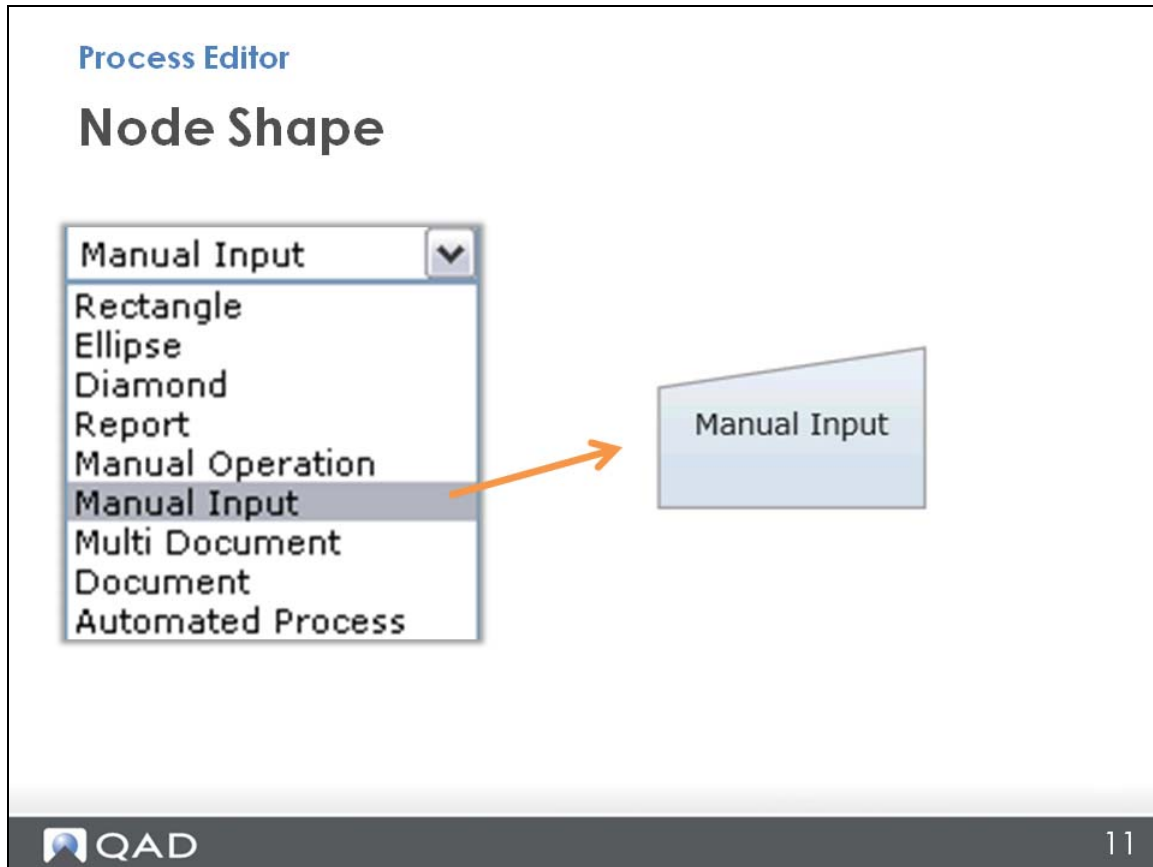
A diamond is a decision point. It visually directs the flow of a map when it can branch in multiple directions.



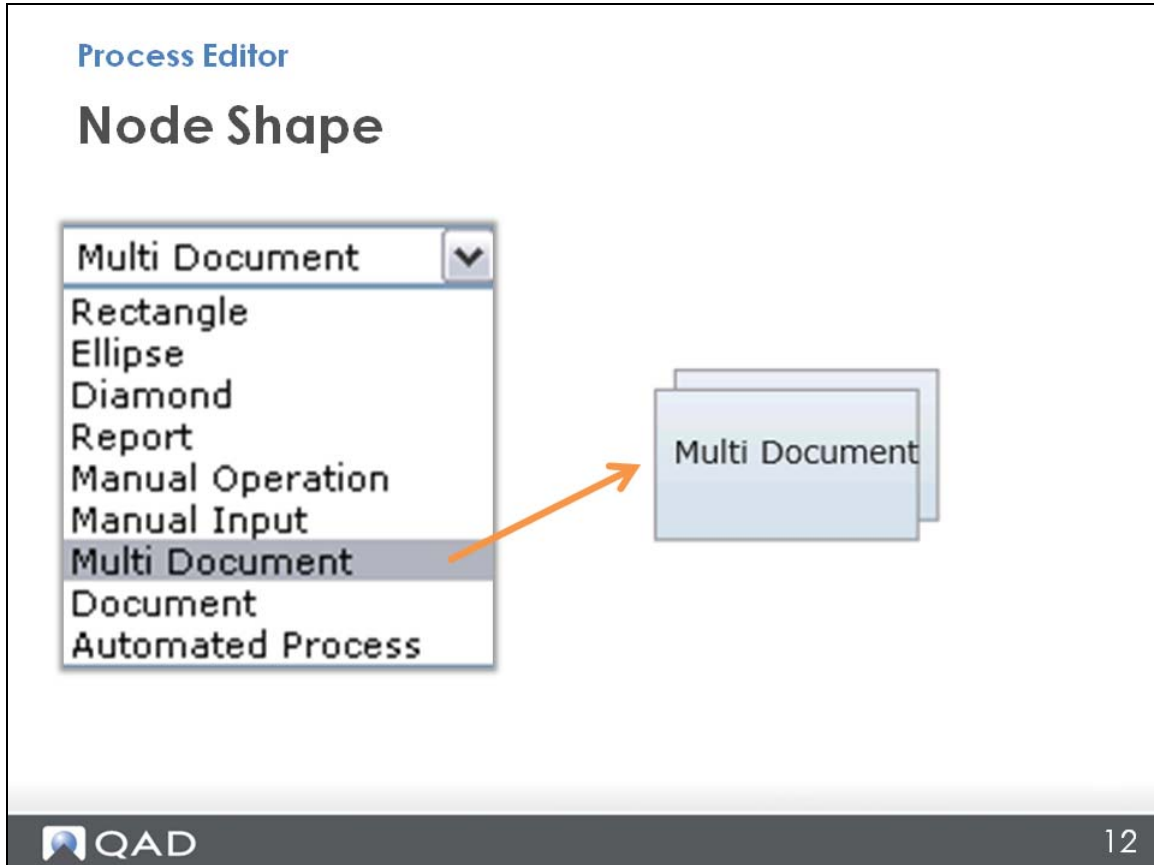
A report shape indicates a link to a report program.



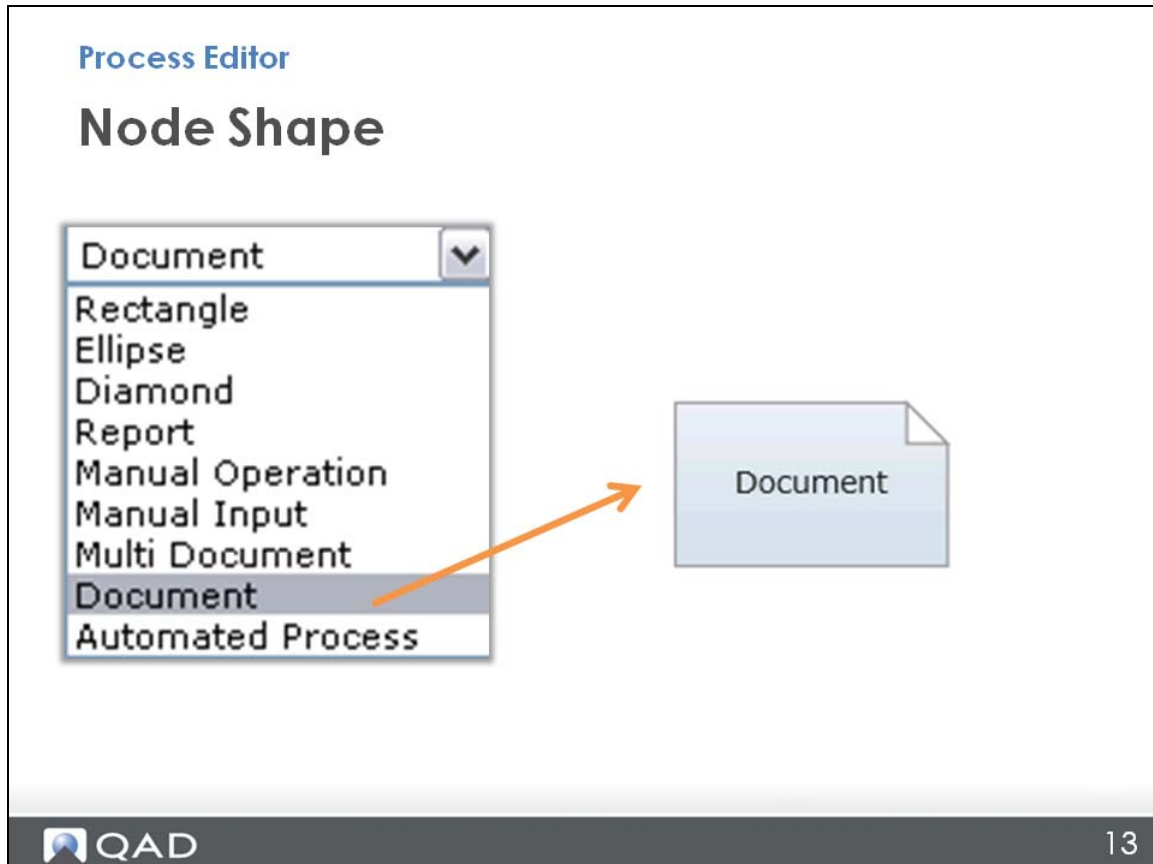
A manual operation shape represents tasks performed outside of the QAD application; for example, external planning.



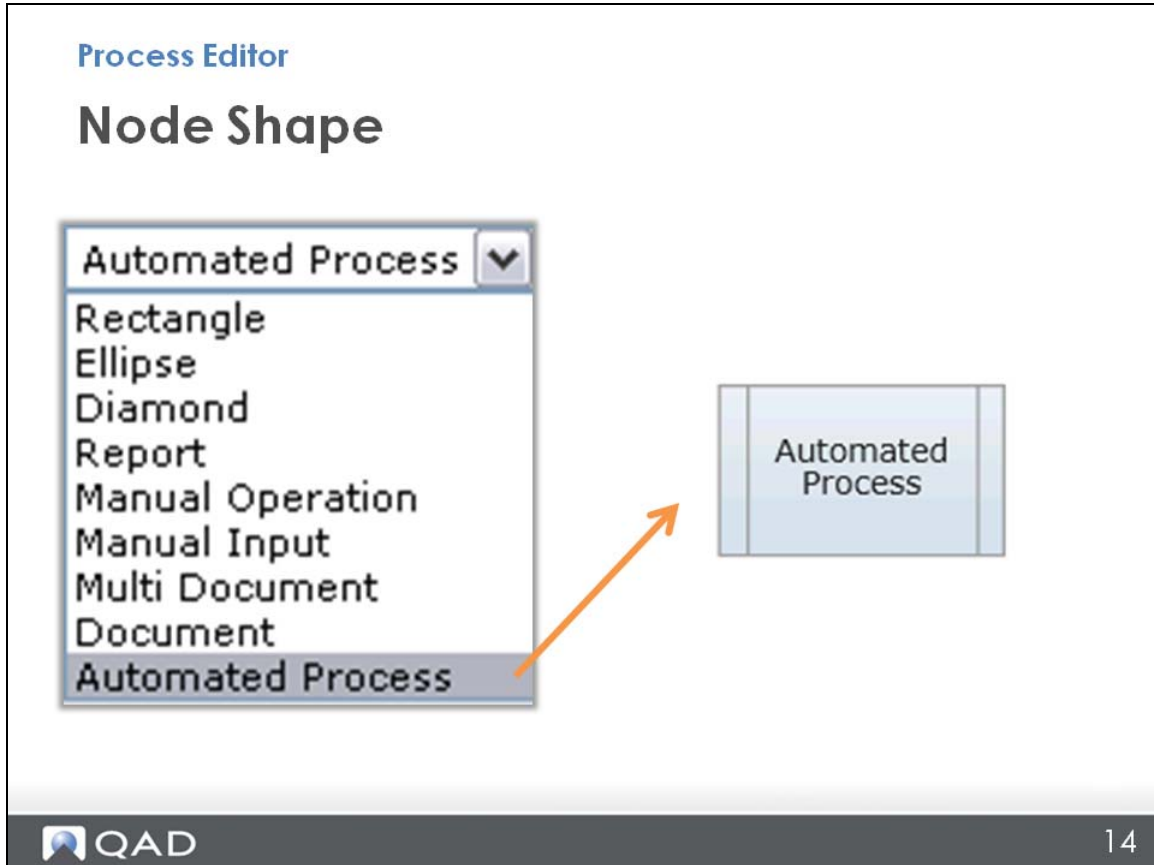
A manual input shape represents inputs to the process from external systems; for example, Electronic Data Interchange (EDI).



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.



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



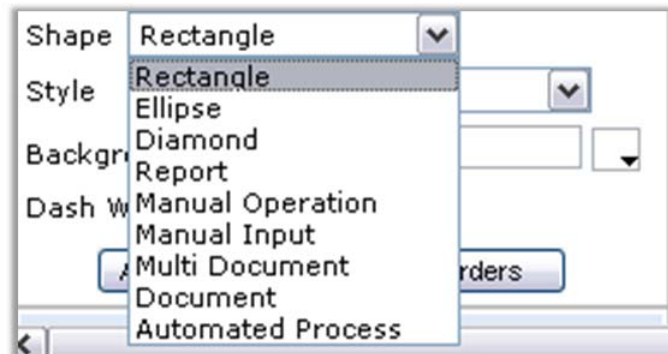
The automated process shape indicates a link to an automated process.

## Exercise: Node Shapes

### Process Editor

## Exercise: Node Shapes

In your grid, create one node for each shape.









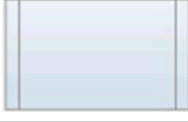


In some cases, the shapes are intuitive; in other cases, you will get used to the shapes as you see them. To practice with the shapes, do the exercise on the next few slides. First, on your Process Editor grid, create one node for each shape.


## Exercise: Identify Node Shapes

Process Editor

### Exercise: Identify Node Shapes

- A. Menu Item
- B. Process
- C. Decision
- D. Report
- E. Manual Operation
- F. Manual Input
- G. Document
- H. Multi Document
- I. Automated Process





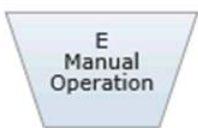


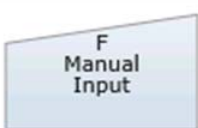

 QAD 16


Put the appropriate letter into the shape that represents it. (The answers are on the next page.)

# Identify Node Shapes

Process Editor

## Identify Node Shapes

 <p>A Menu Item</p>	 <p>D Report</p>	 <p>G Document</p>
 <p>B Process</p>	 <p>E Manual Operation</p>	 <p>H Multi Document</p>
 <p>C Decision</p>	 <p>F Manual Input</p>	 <p>I Automated Process</p>

 QAD 17

Here are the answers.

## Node Style

The screenshot shows the 'Process Editor' interface with the 'Node Style' dialog box open. The dialog has a 'Node Properties' section with the following fields:

- Label: Accept Shipment
- Tooltip: (empty)
- Link: (empty)
- Target: Current Window
- Image: (empty)
- Icon: (empty)
- Shape: Rectangle
- Style: 2011 Node (highlighted with an orange box and an arrow pointing to the style list)
- Background Color: none
- Dash Width: 0

At the bottom of the dialog are two buttons: 'Add More Links' and 'Cell Borders'. To the right of the dialog is a list of styles, with '2011 Deliver' selected and highlighted in blue. The list includes:

- 2011 Deliver
- 2011 Design
- 2011 Enable
- 2011 Engage
- 2011 Financial
- 2011 HR
- 2011 Make
- 2011 Node
- 2011 Node2
- 2011 Plan
- 2011 Service
- 2011 Setup
- 2011 Source
- 2011 Warehouse
- Connector
- Link Node
- Node
- Plan
- Source
- Make
- Deliver
- Warehouse Mgmt
- Financial & Acct Mgmt
- Human Resource Mgmt
- Setup
- Style 1
- Style 2
- Style 3
- Style 4
- Text Node

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.

**Process Editor**

# Node Style

**Style Properties**

Style ID: 2011 Deliver

Font: [dropdown]

Font Style: normal [dropdown]

Font Size: 11 [dropdown]

Font Weight: normal [dropdown]

Text Color: #222222 [dropdown]

Stroke Color: #989898 [dropdown]

Fill Color: url(#2011Deliver) [dropdown]

Opacity: 1 [dropdown]

Stroke Width: 1 [dropdown]

- 2011 Deliver
- 2011 Design
- 2011 Enable
- 2011 Engage
- 2011 Financial
- 2011 HR
- 2011 Make
- 2011 Node
- 2011 Node2
- 2011 Plan
- 2011 Service
- 2011 Setup
- 2011 Source
- 2011 Warehouse
- Connector
- Link Node
- Node
- Plan
- Source
- Make
- Deliver
- Warehouse Mgmt
- Financial & Acct Mgmt
- Human Resource Mgmt
- Setup
- Style 1
- Style 2
- Style 3
- Style 4
- Text Node

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

Process Editor

### Node Shapes and Styles

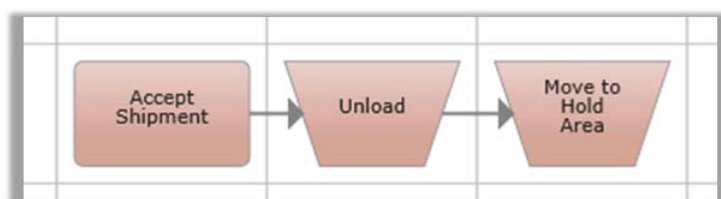
2011 Node	2011 Deliver	2011 Design
2011 Enable	2011 Engage	2011 Financial & Acct Mgmt
2011 Human Resources Mgmt	2011 Make	2011 Node2

 20

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.

## Process Editor

## Node Shapes and Styles

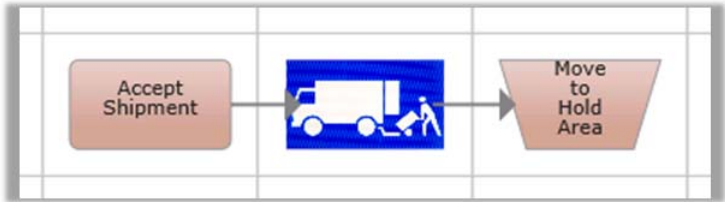


Here are the three nodes, now with a style applied ( “2011 Deliver” style in this case). The first node’s shape shows that it will take you to a screen, and the other two shapes refer to manual processes.

## Changing Nodes to Images

Process Editor

### Changing Nodes to Images



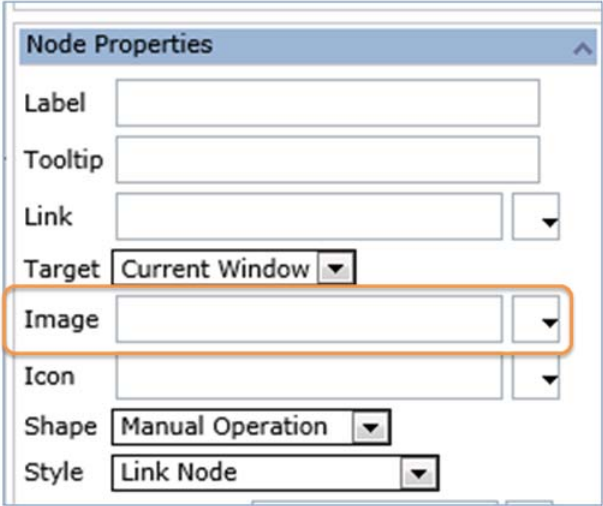
The diagram illustrates a process flow within a grid. The first node is a rounded rectangle containing the text "Accept Shipment". An arrow points from this node to a second node, which is a blue square containing a white icon of a truck being unloaded by a person. A second arrow points from the truck icon node to a third node, which is a trapezoidal shape containing the text "Move to Hold Area".

QAD 22

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.

**Process Editor**

## Changing Nodes to Images



The screenshot shows a 'Node Properties' dialog box with the following fields:

- Label:
- Tooltip:
- Link:
- Target:
- Image:   (highlighted with an orange border)
- Icon:
- Shape:
- Style:

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

## Process Editor

# Changing Nodes to Images

The screenshot displays the 'Process Editor' interface. A 'Node Properties' dialog box is open, showing various configuration options for a node. The 'Style' dropdown menu is highlighted with an orange border and set to 'Link Node'. Below the dialog box, a process flow diagram is visible, consisting of three nodes connected by arrows. The first node is a rounded rectangle labeled 'Accept Shipment'. The second node is a blue square containing a white icon of a forklift operator. The third node is a trapezoid labeled 'Move to Hold Area'. The QAD logo is in the bottom left corner, and the page number '24' is in the bottom right corner.

Node Properties

Label

Tooltip

Link  ▼

Target  ▼

Image  ▼

Icon  ▼

Shape  ▼

Style  ▼

Accept Shipment

Move to Hold Area

QAD 24

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

### Process Editor

## Other Node Properties

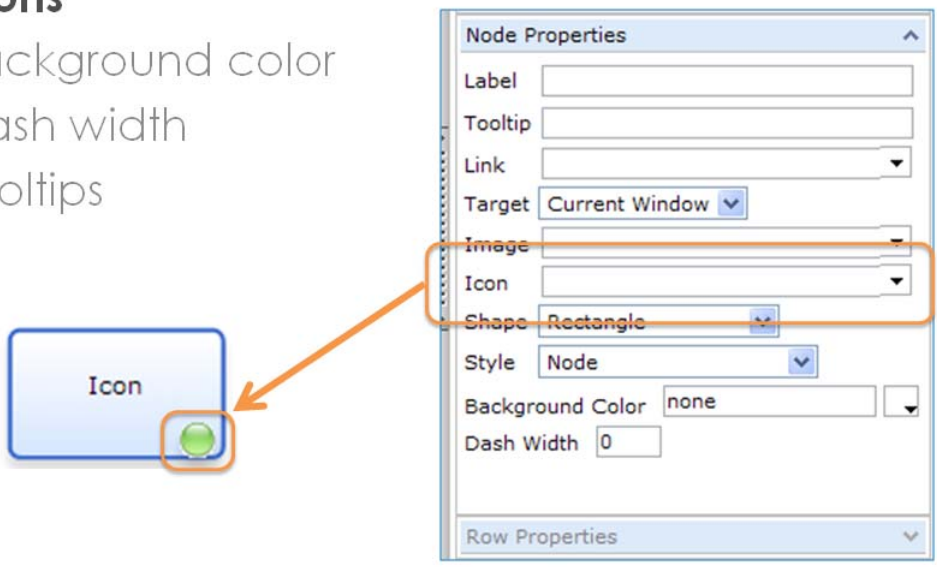
- ✓ Shapes
- ✓ Style
- ✓ Images
- Icons
- Background color
- Dash width
- Tooltips

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.


**Process Editor**

## Other Node Properties

- **Icons**
- Background color
- Dash width
- Tooltips



The screenshot shows the 'Node Properties' panel in the QAD Process Editor. The panel includes fields for Label, Tooltip, Link, Target (set to 'Current Window'), Image, Icon, Shape (set to 'Rectangle'), Style (set to 'Node'), Background Color (set to 'none'), and Dash Width (set to '0'). The 'Image' and 'Icon' fields are highlighted with an orange box. An orange arrow points from this box to a small green circular icon in the bottom right corner of a blue rectangular node labeled 'Icon'.

 QAD 26

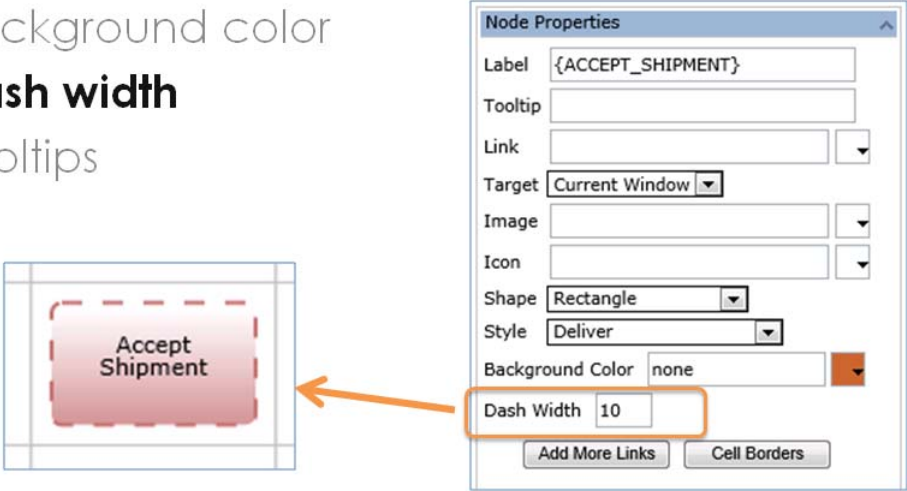
You can select an icon image to display in the lower right-hand corner of the node, much the same as you would add an image – just select the icon image from a file on your computer.




**Process Editor**

## Other Node Properties

- ✓ Icons
- ✓ Background color
- **Dash width**
- Tooltips



The screenshot displays the 'Node Properties' dialog box in the QAD Process Editor. The dialog has several fields: Label (set to {ACCEPT\_SHIPMENT}), Tooltip, Link, Target (Current Window), Image, Icon, Shape (Rectangle), Style (Deliver), Background Color (none), and Dash Width (10). The 'Dash Width' field is highlighted with an orange box, and an orange arrow points from it to the dashed border of a node labeled 'Accept Shipment' in the process map.

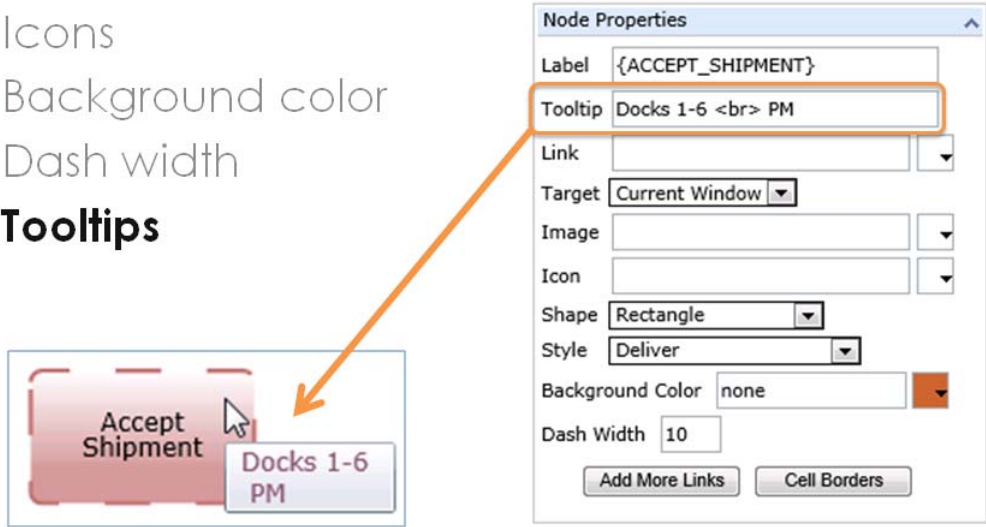
 QAD 28

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

**Process Editor**

## Other Node Properties


- ✓ Icons
- ✓ Background color
- ✓ Dash width
- **Tooltips**



The screenshot illustrates the configuration of a tooltip for a process node. On the left, a node labeled 'Accept Shipment' is shown with a red background and a dashed border. A mouse cursor hovers over it, and a tooltip box appears with the text 'Docks 1-6' on the first line and 'PM' on the second line. An orange arrow points from the tooltip in the diagram to the 'Tooltip' field in the 'Node Properties' dialog box on the right. The dialog box shows the following settings:

- Label: {ACCEPT\_SHIPMENT}
- Tooltip: Docks 1-6 <br> PM
- Link: (empty)
- Target: Current Window
- Image: (empty)
- Icon: (empty)
- Shape: Rectangle
- Style: Deliver
- Background Color: none
- Dash Width: 10

Buttons at the bottom of the dialog include 'Add More Links' and 'Cell Borders'.

 29

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 <br> after the last word on the line. Note that you can have up to four lines.

## Summary


**Process Editor**

### Summary

Node Properties:


- Shape
- Style
- Icons
- Images
- Background color
- Dash width
- Tooltips

Menu Item



2011  
Financial  
& Acct  
Mgmt


Move to  
Hold  
Area

Icon 

Accept  
Shipment

Accept  
Shipment

Docks 1-6  
PM


30

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

### Process Editor Training

## Assignment

1. Change the style of the nodes in your map
2. Change a node to an image
3. Change the background color of a node

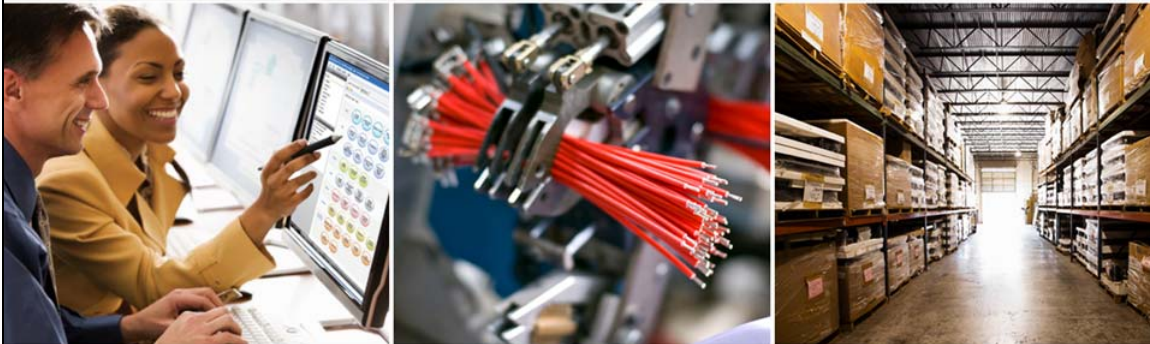
Here is the assignment.



# Connectors

Process Editor Training

## Connectors



Our Passion. Your Advantage.

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:

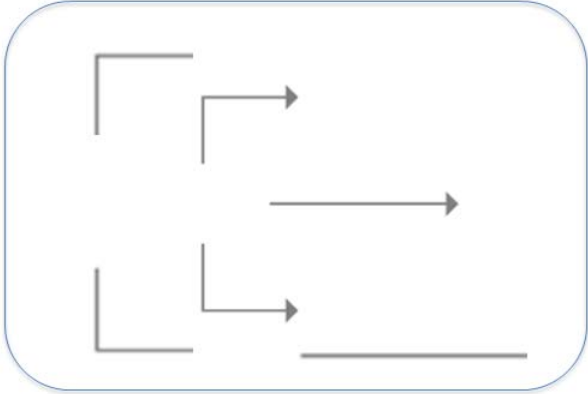
<https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?selectTab=OLT+Activities>

## Connectors


**Process Editor**

### Connectors

- Types
- Labels
- Links



The diagram illustrates four types of connectors used in process maps. 1. A T-junction connector where a vertical line from the left meets a horizontal line from the left, with a horizontal line continuing to the right. 2. A split connector where a vertical line from the left meets a horizontal line from the left, which then splits into two horizontal lines branching to the right. 3. A merge connector where two horizontal lines from the left meet a vertical line from the left, which then continues as a single horizontal line to the right. 4. A long horizontal line connector.

 QAD 2

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.

Process Editor

# Connectors

The diagram illustrates a process flow with two nodes: "Accept Shipment" and "Unload". These nodes are connected by a horizontal arrow pointing from left to right. Below the connector between the two nodes, a large orange arrow points downwards towards the text "SHIFT".


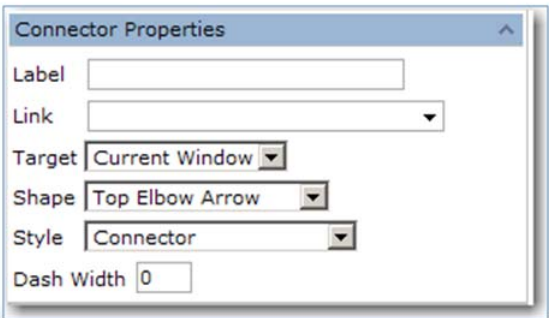
QAD 3

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

**Process Editor**

## Connectors

- Label or link
- Shape:
  - Arrow or line
  - Straight or bent
- Style
- Dash width

**QAD** 4

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

**Process Editor**

### Connector Links

The screenshot displays the 'Connector Properties' dialog box in the QAD Process Editor. The dialog box contains the following fields:

- Label:** QA Hold
- Link:** (Dropdown menu)
- Target:** Current Window
- Shape:** Straight Arrow
- Style:** Connector
- Dash Width:** 0

The 'Link' dropdown menu is open, showing three options: 'Choose File', 'Menu Lookup', and 'Process List Lookup'. An orange arrow points from the 'Link' field to the 'Process List Lookup' option.

Below the dialog box, a process map diagram is shown. It consists of three rounded rectangular boxes: 'Accept Shipment', 'QA Hold', and 'Move to Hold Area'. The 'QA Hold' box is highlighted with an orange border. An arrow points from 'Accept Shipment' to 'QA Hold', and another arrow points from 'QA Hold' to 'Move to Hold Area'. An orange arrow also points from the 'QA Hold' text in the process map back to the 'Label' field in the dialog box.

**QAD** 5

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

**Process Editor**

### Connector Shapes

**Connector Properties**

Label

Link

Target


Shape 

- Straight Line
- Straight Arrow
- Top Elbow Line
- Top Elbow Arrow
- Bottom Elbow Line
- Bottom Elbow Arrow

Style

Dash W

Node P


6

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

**Process Editor**

### Connector Style and Dash Width

The screenshot displays the 'Process Editor' interface. On the left is a tree view of process nodes, with 'Connector' selected. In the center is the 'Connector Properties' dialog box, which includes fields for 'Label' (set to 'Dash 5'), 'Link', 'Target' (set to 'Current Window'), 'Shape' (set to 'Straight Arrow'), 'Style' (set to 'Connector'), and 'Dash Width' (set to '5'). To the right of the dialog box, four examples of connector lines are shown, labeled 'Dash 0', 'Dash 5', 'Dash 10', and 'Dash 20', illustrating the visual effect of increasing the dash width. Orange arrows point from the 'Connector' node in the tree to the 'Connector Properties' dialog, and from the 'Dash Width' field to the examples of different dash widths.

2011 Deliver  
2011 Design  
2011 Enable  
2011 Engage  
2011 Financial  
2011 HR  
2011 Make  
2011 Node  
2011 Node2  
2011 Plan  
2011 Service  
2011 Setup  
2011 Source  
2011 Warehouse  
**Connector**  
Link Node  
Node  
Plan  
Source  
Make  
Deliver  
Warehouse Mgmt  
Financial & Acct Mgmt  
Human Resource Mgmt  
Setup  
Style 1  
Style 2  
Style 3  
Style 4  
Text Node

Connector Properties

Label Dash 5

Link

Target Current Window

Shape Straight Arrow

Style Connector

Dash Width 5

Dash 0

Dash 5

Dash 10

Dash 20

QAD 7

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.

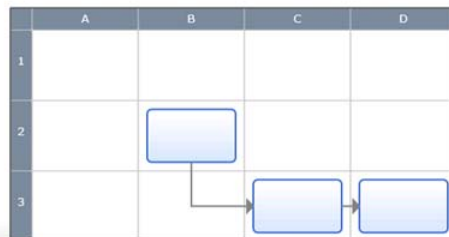
You can also change the dash width of the connector to make a dashed line instead of solid, although this is not very common.

## Exercise: Make a Connector

### Process Editor

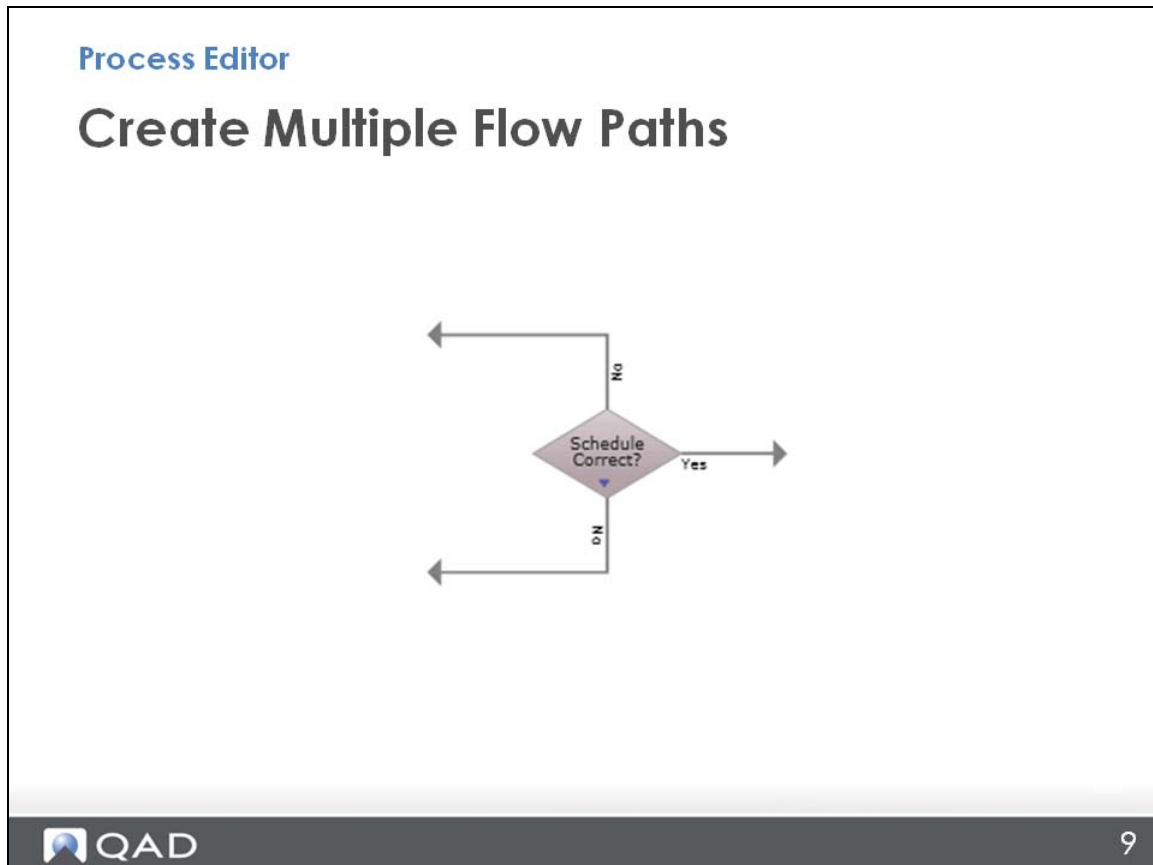
## Exercise: Make a Connector

1. Create three nodes, B2, C3, and D3
2. Click on B2
3. Press and hold the Shift button
4. Click on C3
5. Click on the connector
6. Select the Shape: Bottom Elbow Arrow
7. Connect C3 and D3.

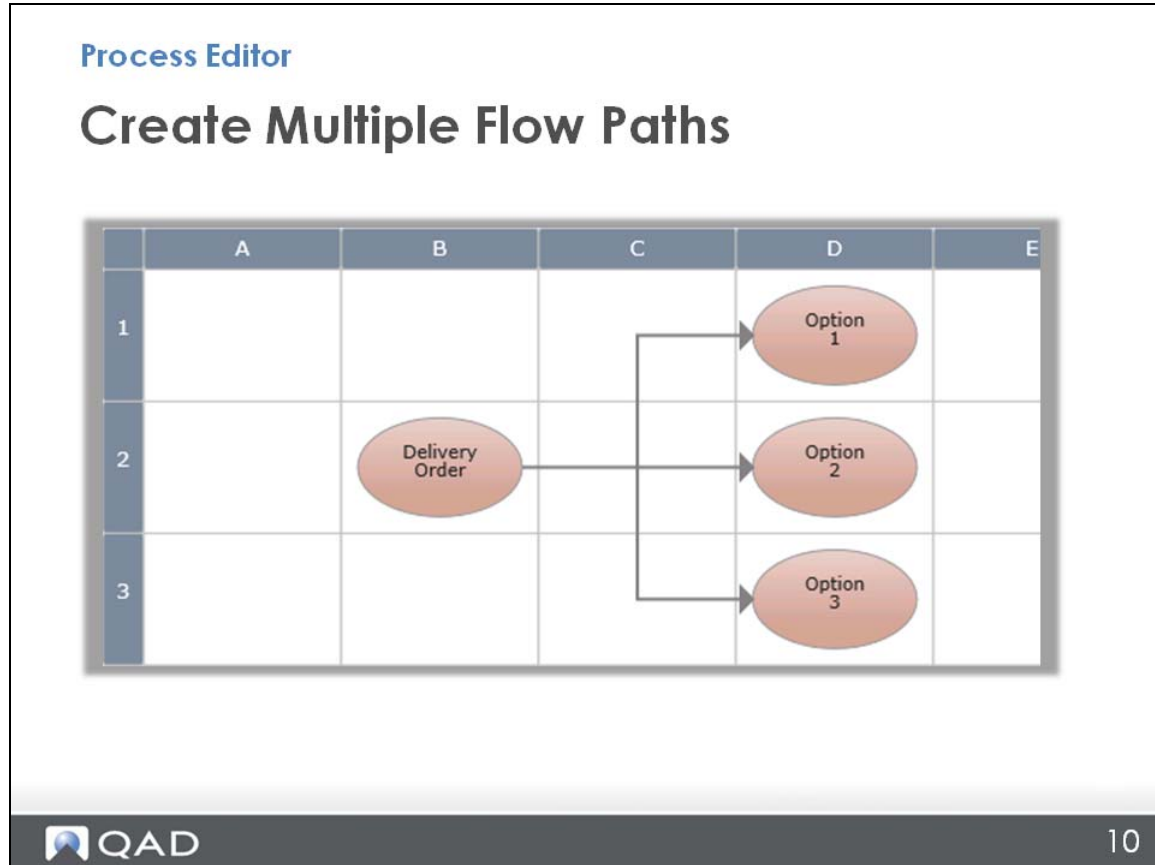


Do this exercise to practice making connectors.

## 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.



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.

**Process Editor**

## Create Multiple Flow Paths

	A	B	C	D
1				Option 1
2		Delivery Order		Option 2
3				Option 3

QAD 11

Basically, you have to create some additional nodes.

**Process Editor**

## Create Multiple Flow Paths

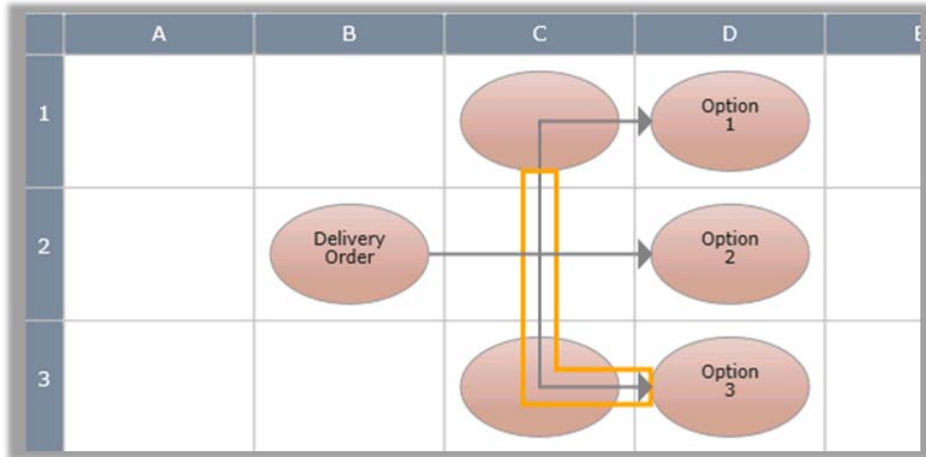
	A	B	C	D	E
1				Option 1	
2		Delivery Order		Option 2	
3				Option 3	

QAD 12

Then, use them only to connect other nodes.

Process Editor

# Create Multiple Flow Paths



**Process Editor**

## Create Multiple Flow Paths

The screenshot displays a process map within a grid. The grid has columns labeled A, B, C, D, and E, and rows labeled 1, 2, and 3. A node labeled 'Delivery Order' is located in cell B2. Three arrows originate from the right side of this node, pointing to three nodes in column D: 'Option 1' in cell D1, 'Option 2' in cell D2, and 'Option 3' in cell D3. Below the grid, a style palette is open, showing 'Shape' set to 'Style 4', 'Text Node' selected, and 'Style' set to '2011 Driver'.

QAD 14

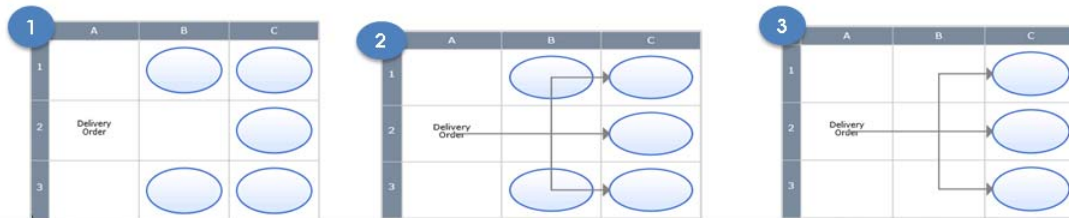
You can then delete them (or make them transparent) and still leave the connectors showing. To delete a node, you simply click on it and hit the Delete key. To make a node transparent, you make it a Text Node style and do not enter any text. It just becomes a transparent node that you can connect to.

## Exercise: Multiple Inputs/Outputs

### Process Editor

## Exercise: Multiple Inputs/Outputs

1. Create six nodes (A2, B1, B2, C1, C2, C3) and give A2 a Text Node style that says "Delivery Order."
2. Add connectors:
  1. Straight arrow from A2 - C2.
  2. Bottom elbow arrow from B2 - C3.
  3. Top elbow arrow from B3 - C1.
3. Either delete B1 and B3 or make them transparent.



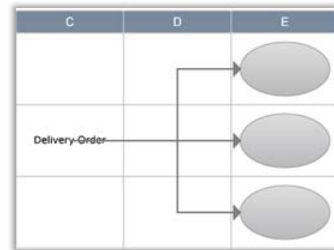
Do this exercise to practice creating multiple flow paths.

## Summary

### Process Editor – Connectors

## Summary

- Labels and links
- Shape and style
- Dash width
- Multiple flow paths



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

## Process Editor Training

# 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:

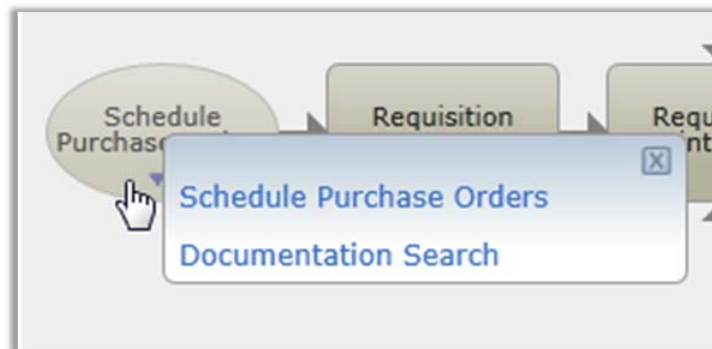
<https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?selectTab=OLT+Activities>

## Links

### Process Editor

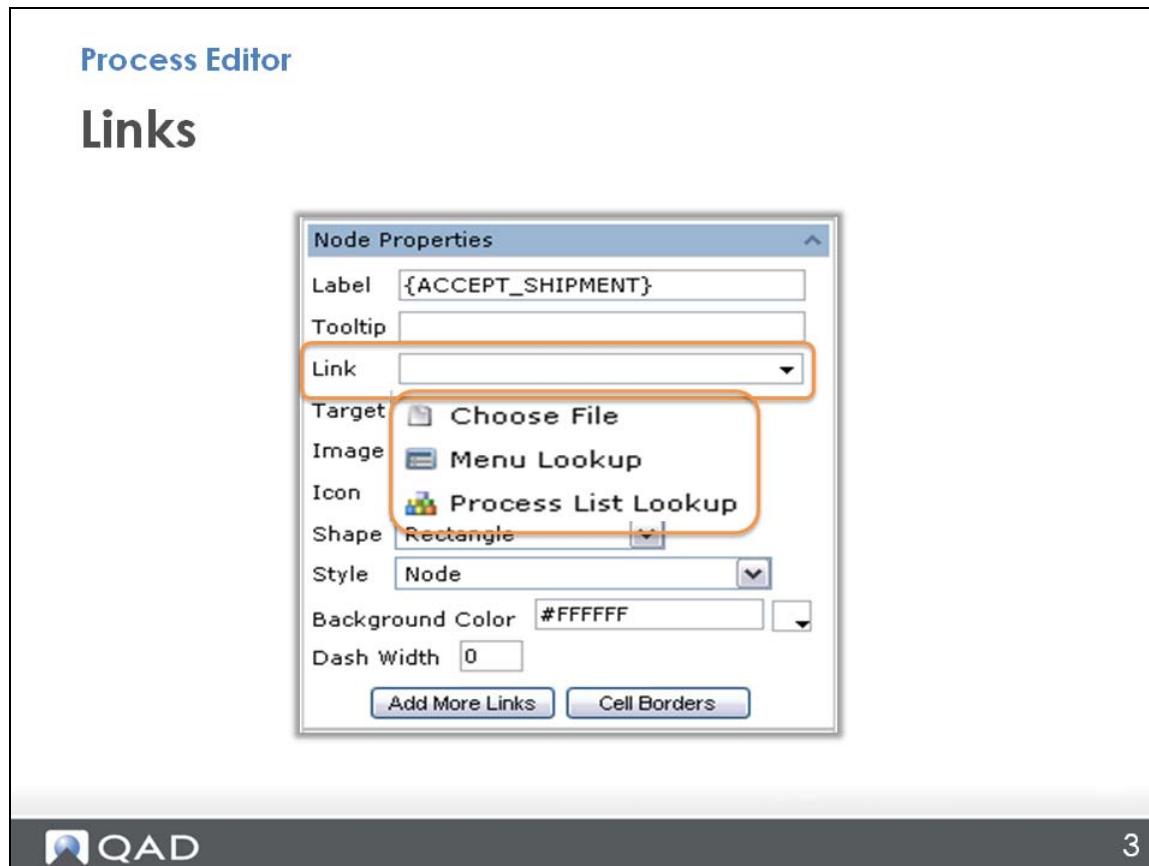
## Links

- Files
- QAD screens (menus)
- Other process maps (processes)
- Websites



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.

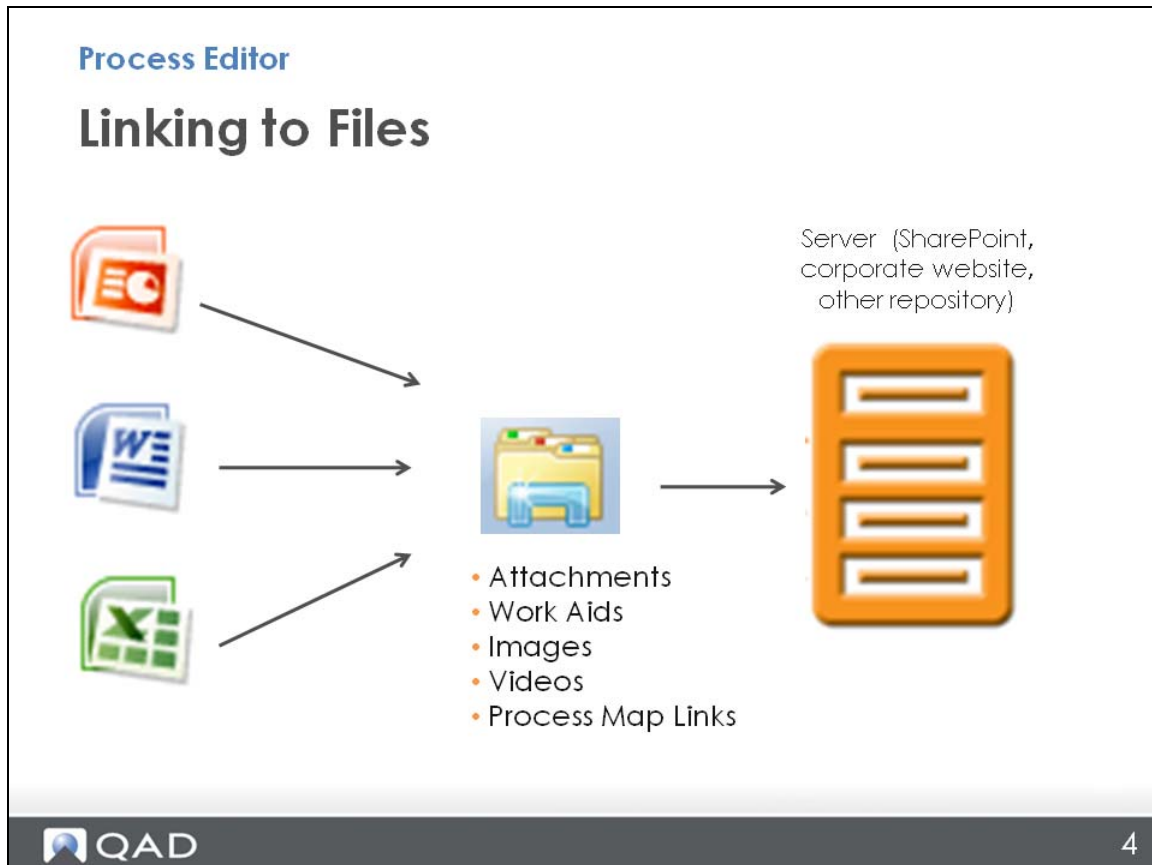
Overall, you can have up to eight links per node, so you can add more links to go to training documentation, videos, sites in your company's Intranet external web sites, or even another process map that you create and customize.



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.

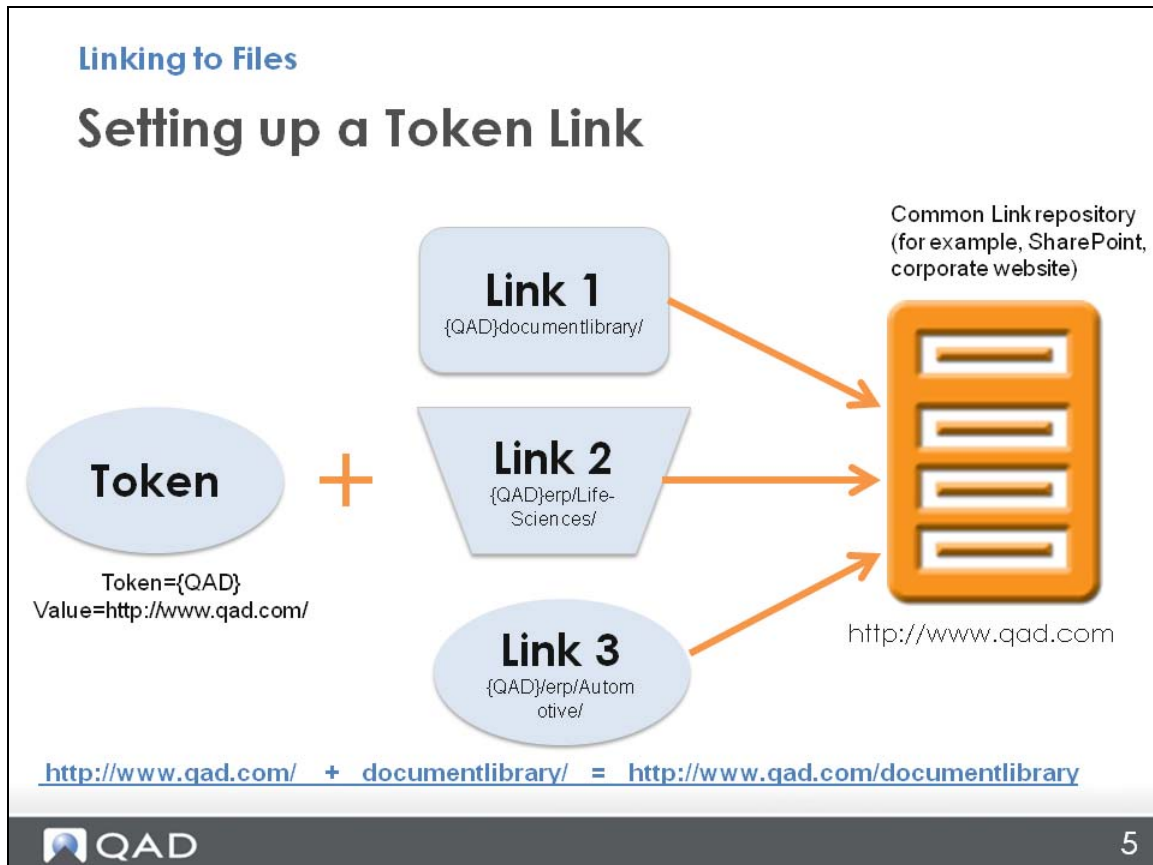
## Linking to Files



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.

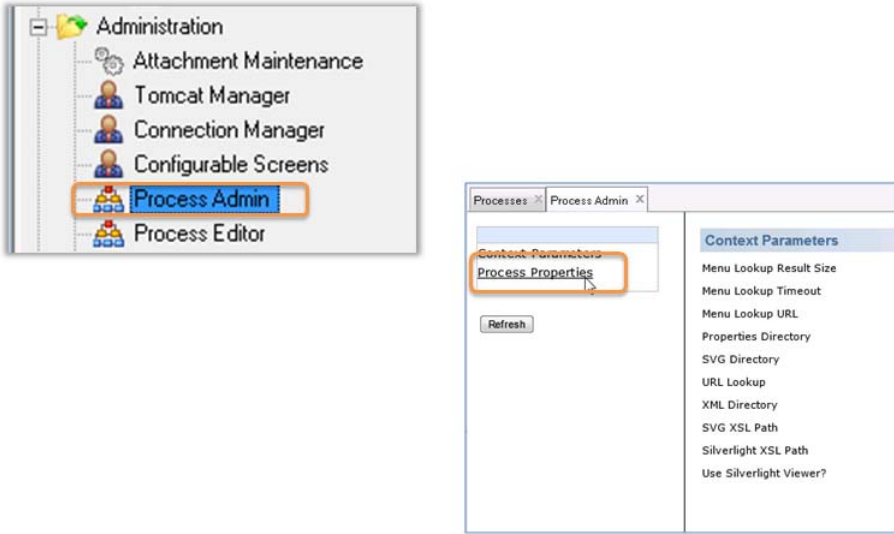
If the server is ever replaced or the file structure changed, you only have to change this one token link to have everything else redirected. Without this token, if the server changes, you have to update every link you have created on all the separate nodes.

For example, consider the server for [www.qad.com](http://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](http://www.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.

## Linking to Files

# Setting up a Token Link



The image shows two screenshots from the QAD Administration interface. The left screenshot displays the 'Administration' menu with 'Process Admin' highlighted. The right screenshot shows the 'Process Admin' window with 'Process Properties' highlighted in the left sidebar and a list of 'Context Parameters' on the right.

**Administration Menu:**

- Administration
- Attachment Maintenance
- Tomcat Manager
- Connection Manager
- Configurable Screens
- Process Admin**
- Process Editor

**Process Admin Window:**

Context Parameters

- Menu Lookup Result Size
- Menu Lookup Timeout
- Menu Lookup URL
- Properties Directory
- SVG Directory
- URL Lookup
- XML Directory
- SVG XSL Path
- Silverlight XSL Path
- Use Silverlight Viewer?

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

## Linking to Files

# Setting up a Token Link

Context Parameters		Process Properties				
Process Properties		Delete	Name	Value	Scope	URL Parameter
<input type="checkbox"/>	Attachments	<input type="checkbox"/>		http://exli18.qad.com/2012_eob/	global	<input type="checkbox"/>
<input type="checkbox"/>	H_ATTACHMENTS	<input type="checkbox"/>		http://sharepoint.com/specific folder	global	<input type="checkbox"/>
<input type="checkbox"/>	QAD_CONTENT	<input type="checkbox"/>		{QAD_DT_DOC_ROOT}/content/	global	<input type="checkbox"/>
<input type="checkbox"/>	QAD_CONTENT_IMG	<input type="checkbox"/>		/content/	global	<input type="checkbox"/>
<input type="checkbox"/>	QAD_DT	<input type="checkbox"/>		{QAD_SH}	global	<input type="checkbox"/>
<input type="checkbox"/>	QAD_DT_DOC_ROOT	<input type="checkbox"/>		/qadui	global	<input type="checkbox"/>
<input type="checkbox"/>	QAD_DT_IMG	<input type="checkbox"/>		/images/	global	<input type="checkbox"/>
<input type="checkbox"/>	QAD_HOMESERVER	<input type="checkbox"/>		http://qaddemo.qad.com:8080/qadhome/	global	<input type="checkbox"/>
<input type="checkbox"/>	QAD_IMG	<input type="checkbox"/>		{QAD_PMAP_ROOT}images/	global	<input type="checkbox"/>
<input type="checkbox"/>	QAD_IMG_DOCUMENT	<input type="checkbox"/>		{QAD_IMG}document.gif	global	<input type="checkbox"/>
<input type="checkbox"/>	QAD_IMG_MENUITEM	<input type="checkbox"/>		{QAD_IMG}table.gif	global	<input type="checkbox"/>
<input type="checkbox"/>	QAD_IMG_PROCESS	<input type="checkbox"/>		{QAD_IMG}process.gif	global	<input type="checkbox"/>

## Linking to Files

# Setting up a Token Link

**Process Properties**

Delete	Name	Value	Scope	URL Parameter
<input type="checkbox"/>	QAD_PLINKS		global	<input type="checkbox"/>
<input type="checkbox"/>	QAD_PLINKS	http://sharepoint/QADdocfolder	global	<input type="checkbox"/>

Context Parameters  
Process Properties

Refresh

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

**Process Editor**

### Linking to Files

The screenshot displays the QAD Process Editor interface. On the left is a properties panel with the following sections:

- Name:** example9
- Title:** [Empty field]
- Owner:** [Empty field]
- Grid Properties:** [Dropdown menu]
- Style Properties:** [Dropdown menu]
- Process Properties:** [Dropdown menu]
- Connector Properties:** [Dropdown menu]
- Node Properties:**
  - Label:** Accept Shipment
  - Tooltip:** [Empty field]
  - Link:** [Text input field]
  - Target:** New Win (selected), Choose File
  - Image:** [Empty field], Menu Lookup
  - Icon:** [Empty field], Process List Lookup

The main workspace is a grid with columns A, B, C, D and rows 1, 2, 3, 4, 5. A process flow is shown in row 2:

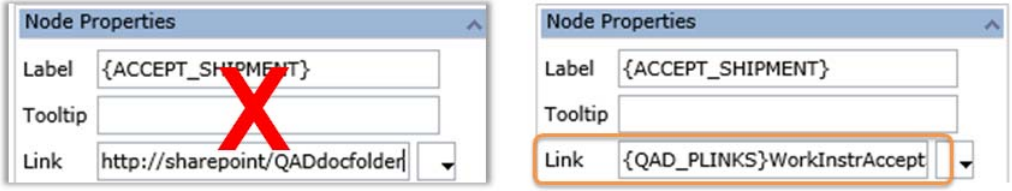
- Node 1 (B): Accept Shipment (highlighted with a yellow border)
- Node 2 (C): Unload
- Node 3 (D): Move to Hold Area

Arrows indicate the flow from 'Accept Shipment' to 'Unload' and then to 'Move to Hold Area'. The QAD logo is in the bottom left, and the number 9 is in the bottom right.

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

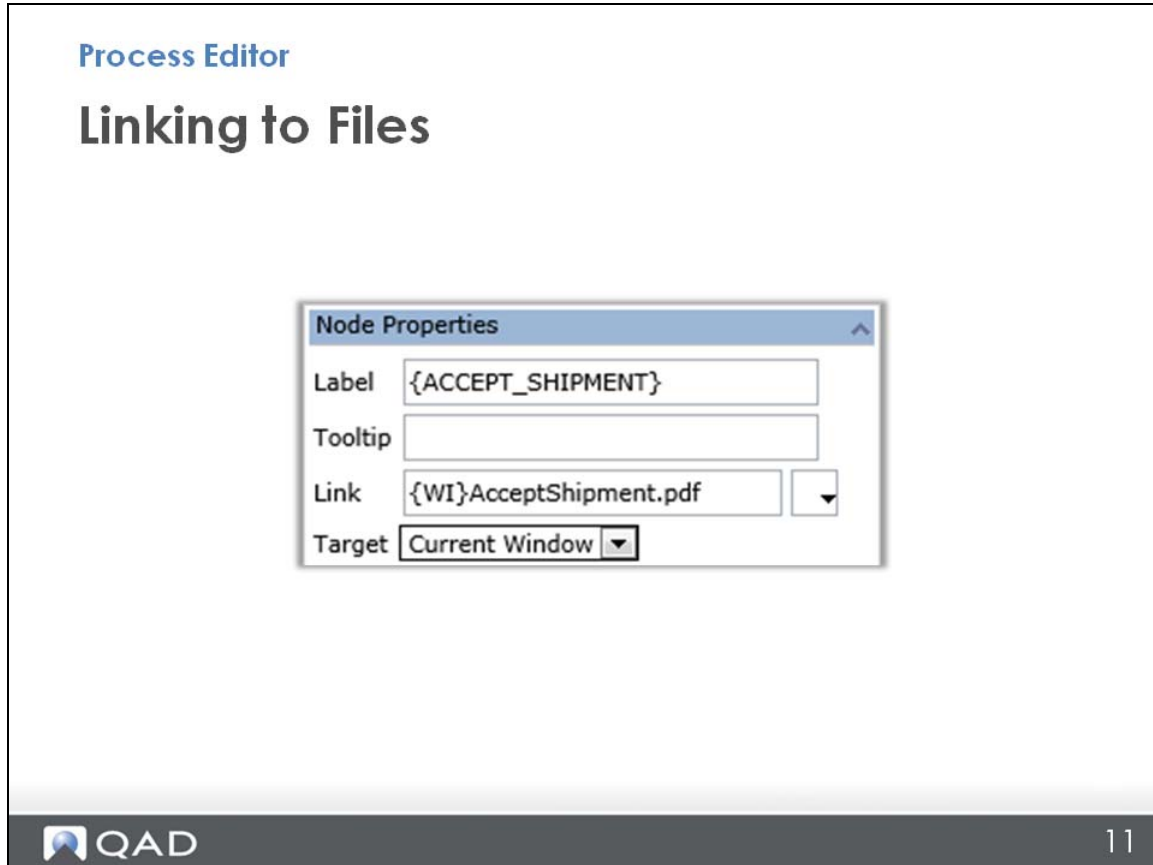
## Process Editor

### Linking to Files



The image displays two side-by-side screenshots of the 'Node Properties' dialog box in the Process Editor. Both screenshots show the 'Label' field set to '{ACCEPT\_SHIPMENT}' and the 'Tooltip' field empty. The 'Link' field in the left screenshot contains the URL 'http://sharepoint/QADdocfolder' and is marked with a large red 'X', indicating it is the incorrect method. The 'Link' field in the right screenshot contains the token '{QAD\_PLINKS}WorkInstrAccept' and is highlighted with an orange box, indicating it is the correct method for linking to files.

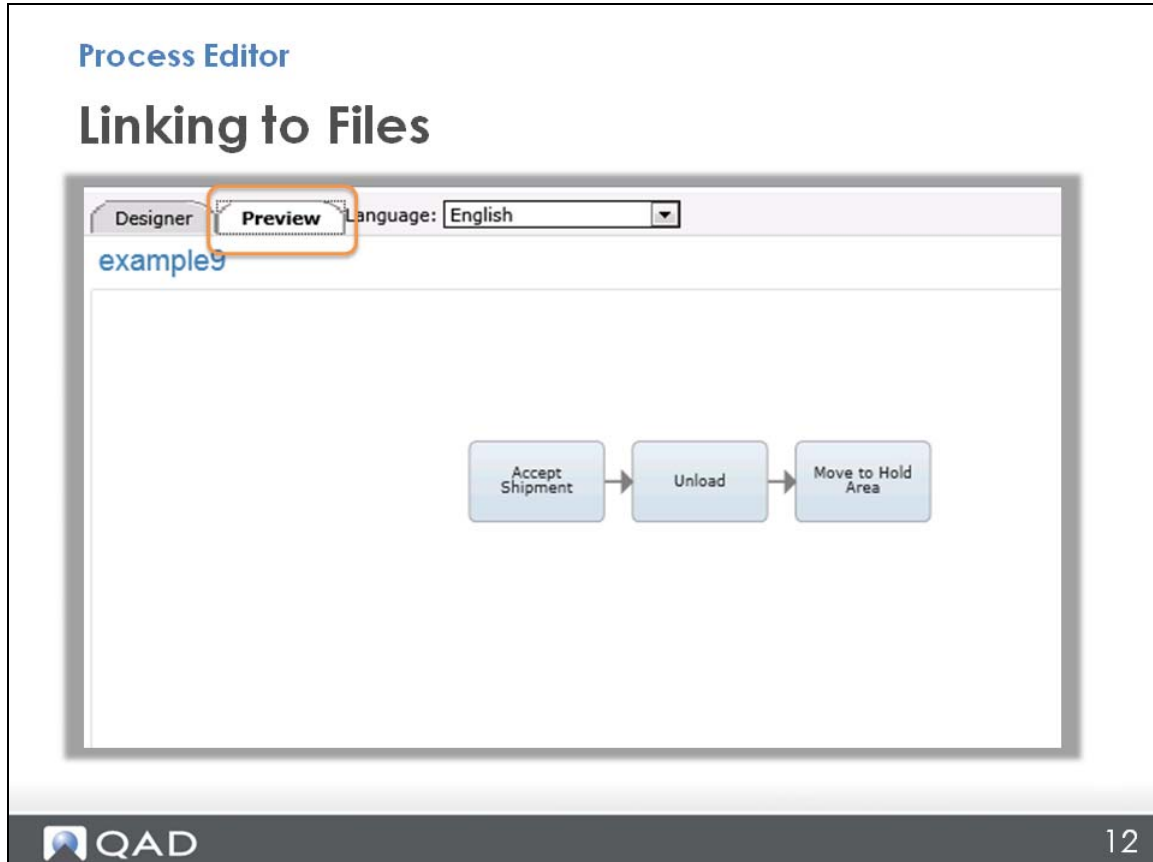
Rather than using the Choose File option under Links, type the token name and then specify the file. In this case, {QAD\_PLINKS} represents the QAD Doc Folder on Sharepoint, and you want the Work Instruction for Accepting Shipments.



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.



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.

**Process Editor**

## Linking to Files

The screenshot displays the QAD Process Editor interface. At the top, there are tabs for 'Designer' and 'Preview', and a language dropdown menu set to 'English'. Below the tabs, the text 'example9' is visible. The main area shows a process flow with three steps: 'Accept Shipment', 'Unload', and 'Move to Hold Area', connected by arrows. An orange arrow points from the 'Accept Shipment' step to a separate window titled 'Receiving Process Documentation'. This window contains the following text:

**Receiving Process Documentation**  
WORK INSTRUCTIONS

DOCUMENT TYPE: OI  
DOCUMENT NUMBER: OI-2010-003-A  
REVISION DATE: 4/19/2013  
REVISOR: JRG

QAD 13

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.

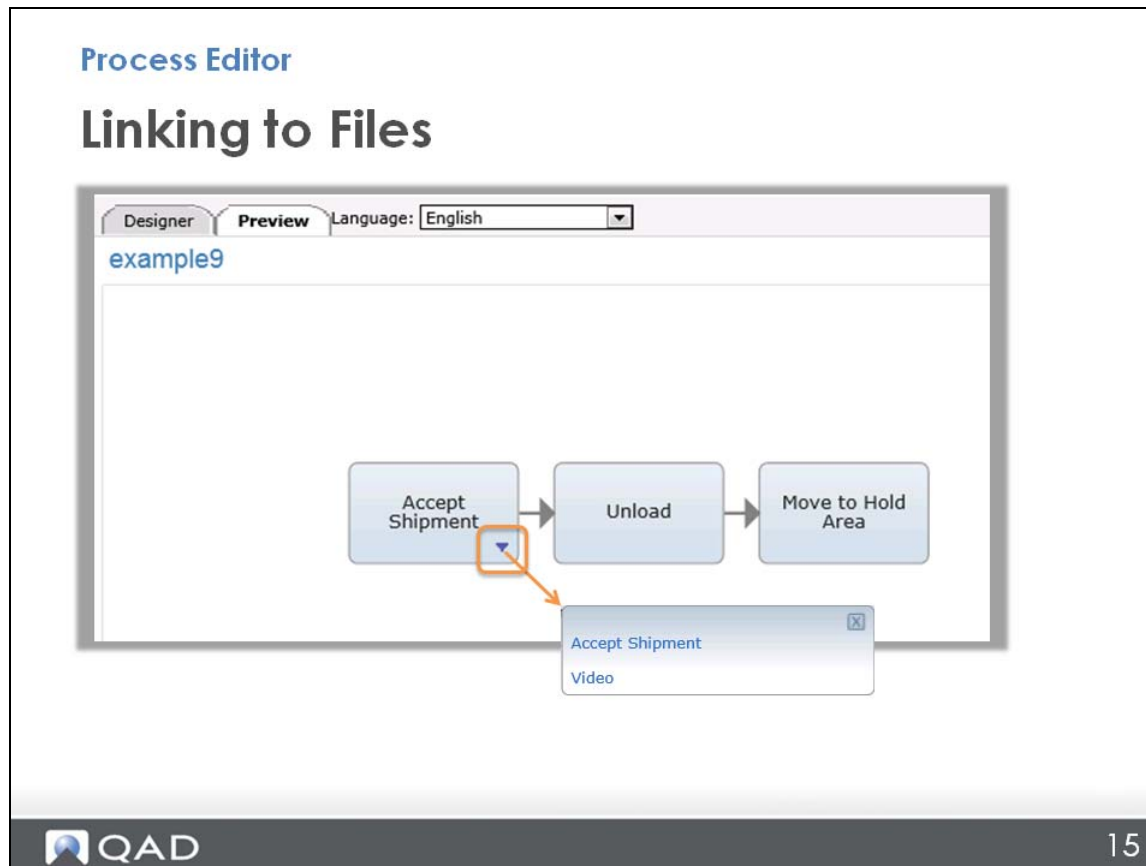
## Process Editor

# Linking to Files

The screenshot shows two dialog boxes in the Process Editor. The 'Node Properties' dialog on the left has the 'Add More Links' button highlighted with an orange box. The 'Add More Links' dialog on the right shows a list of links, with the first link, 'Link1', highlighted in orange. The 'Link1' field contains the text '{EOS}Accept Shipments.mp4'.

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.



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

### Linking to Files

## Review: How to Set up a Token Link

- 1) Open Admin/ProcessAdmin, then Process Properties
- 2) Click New and create a name for the token (for example: {WA} for Work Aids)
- 3) Specify the server name/location
  - Example: <http://www.qad.com>
- 4) Open a Node in Process Editor
- 5) In the Link field, enter the token in curly brackets, followed by the file name you want to link
- 6) Open the preview and click the node to test the 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

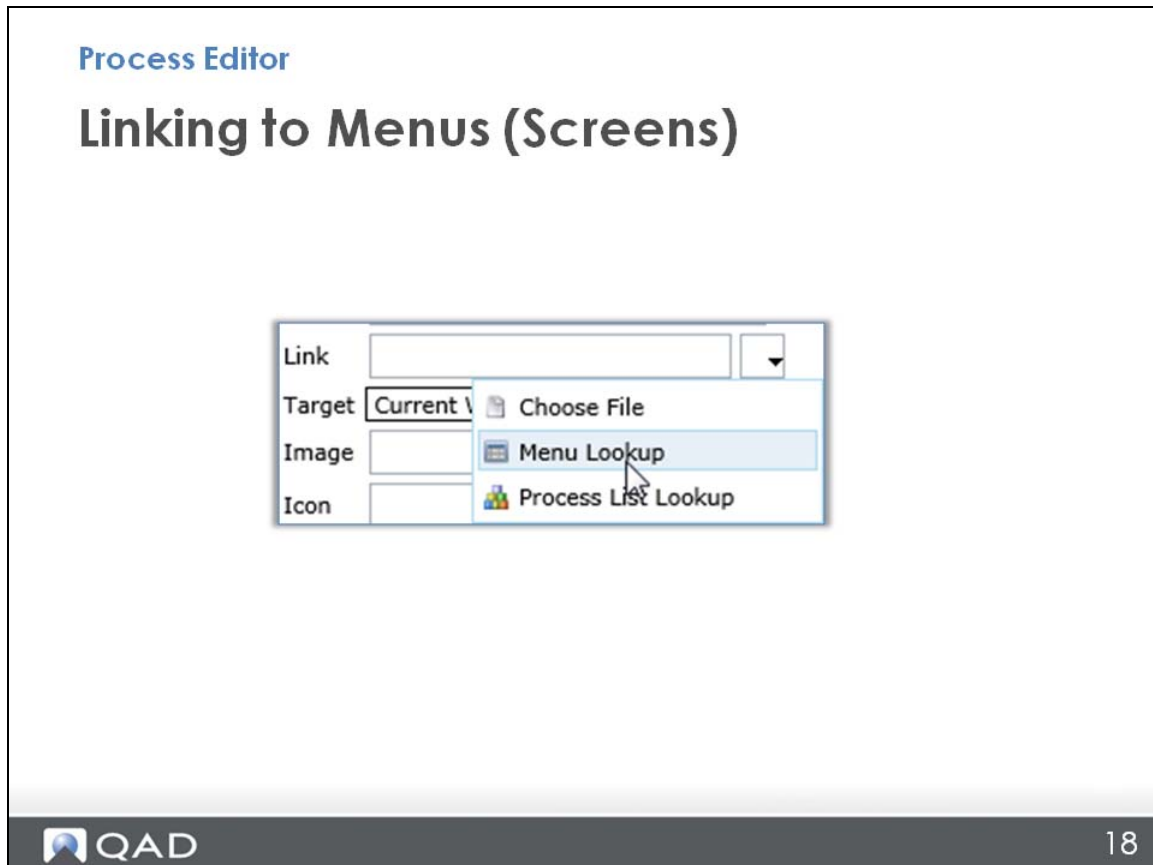
### Process Editor

### Exercise: Linking to Files

1. Upload a file to a folder on a shared server
2. Create a token in Process Admin
3. In the Editor, type the token (in curly brackets) in the Link field
4. Enter the rest of the path to your file
5. Open the preview and click the node to check the link

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.

## Process Editor

## Linking to Menus (Screens)

Menu Number	Program	Label	
1	1.1.1	icstmt.p	Inventory Status Code Maint
2	1.1.10	gpbr501.p	Inventory Movement Code Browse
3	1.1.13	icsimt.p	Site Maintenance
4	1.1.14	gpbr348.p	Site Browse
5	1.1.14*	icsiiq.p	SITE_INQUIRY
6	1.1.15	icsirp.p	Site Report
7	1.1.18	iclomt.p	Location Maintenance
8	1.1.19	gpbr336.p	Location Browse
9	1.1.19*	icloiq.p	LOCATION_INQUIRY
10	1.1.2	gpbr349.p	Inventory Status Code Browse
11	1.1.2*	icstiq.p	INVENTORY_STATUS_CODE_INQUIRY
12	1.1.20	iclorp01.p	Location Report
13	1.1.3	icstrp.p	Inventory Status Code Report
14	1.1.5	ppstmt.p	Item Status Code Maintenance
15	1.1.6	gpbr198.p	Item Status Code Browse
16	1.1.6*	ppstiq.p	ITEM_STATUS_CODE_INQUIRY
17	1.1.7	ppstrp.p	Item Status Code Report

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.

**Process Editor**

## Linking to Menus (Screens)

	Menu Number $\triangle$	Program	Label
1	5.5.3.1	rssup.p	Schedule Update from MRP
2	5.5.3.13	rsrp01.p	Schedule Report
3	5.5.3.15	rsrp02.p	Schedule Comparative
4	5.5.3.17	rsrp03.p	Schedule Authorization Report
5	5.5.3.23	rsdel.p	Schedule Delete/Archive
6	5.5.3.3	rssmt.p	Schedule Maintenance
7	5.5.3.4	rsiq01.p	Schedule Inquiry
8	5.5.3.5	rsiq02.p	Schedule History Inquiry
9	5.5.3.8	rsrp05.p	Schedule Print
10	5.5.3.9	rsrp09.p	Schedule Print in Fax Format

Link

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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

Linking to Menus/Screens

### Finding the Name of a Program

The screenshot illustrates the steps to find a program name in QAD. It shows three overlapping windows:

- Applications**: A search window with 'purchase order re' entered. A context menu is open over 'Purchase Order Receipts', with 'Properties' highlighted.
- Purchase Order Receipts Properties**: A dialog box with the 'Program' tab selected. It shows:
  - URL: qadsh://menu/invoke?menu-key=A.2&menuite...
  - Key: 5.13.1
  - Aliases: 5.13.1, poporc.p
  - Menu: Supply Chain
- Node Properties**: A dialog box with the 'Link' field containing the text `{QAD_SH}poporc.p`.

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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)

### Process Editor

### Exercise: Linking to Menus (Screens)

1. Click a node and select the Link/Menu Lookup option
2. Do a filter search on Label -- "Starts with" --Purchase Order
3. Double-click on Purchase Order Receipts
  - If the token and link do not automatically appear in the Link field of Node Properties, type the token {QAD\_SH} , then copy and paste the program number.
4. Check the link in the Preview

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

## Linking to Process Maps

**Process Editor**

### Linking to Process Maps

The screenshot shows the 'Process Editor' interface. The 'Link' dropdown menu is open, showing options: 'New Win', 'Choose File', 'Menu Lookup', and 'Process List Lookup'. The 'Process List Lookup' option is highlighted with an orange box. An arrow points from this option to a table titled 'Open Process'.

	Name ▲	Title
1		
2	0_Demo	Color Comparison
3	0_Demo2	Color Comparison
4	1_OPV_EF	Operational Metrics View
5	1_OPV_EF_Demo	Operational View - Demo
6	1_SCP_EF	Supply Chain Process Model
7	1_VIP_EF	Home
8	1_VIP_EF_EOB	Home
9	1_VIP_EF_OLD	Vertical Industry Process Model
10	ADD_ONS	{ADD_ON_PRODUCTS}
11	Assy_Kit	Assemble Configured Kit
12	Auto	Automotive
13	Auto_1_2_1	Define Products and Processes
14	Auto_1_2_2	Implement Planning Modules
15	Auto_1_2_3	Implement Manufacturing Modules
16	Auto_1_2_4	Implement Procurement Modules
17	Auto_1_2_5	Implement Sales Modules
18	Auto_1_2_6	Implement Financial Modules
19	Auto_1_5	Set Up Items and Sites
20	Auto_1_6	Set Up Terms and Taxes
21	Auto_1_9	Set Up Business Relationships

**QAD** 23

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

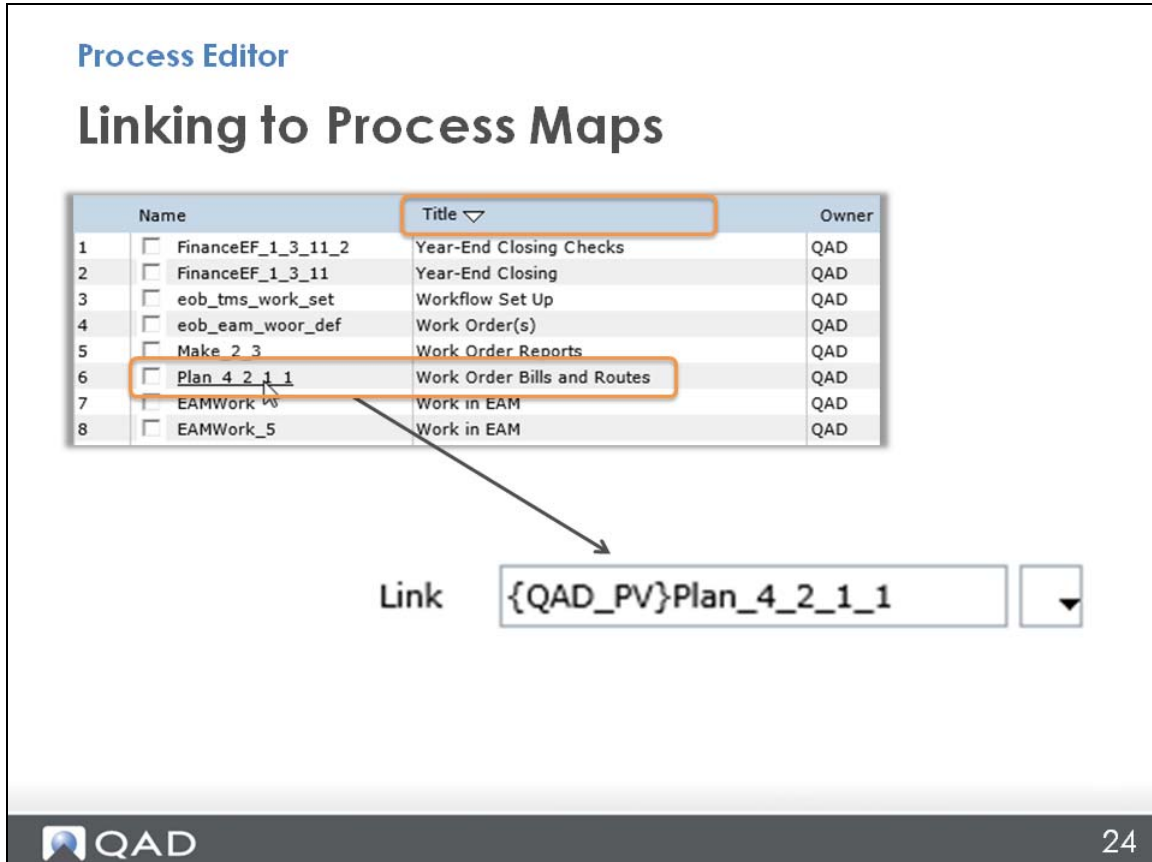
When you open this option, you see a list of process map names and titles. You can click on the headings to sort the columns.


**Process Editor**

## Linking to Process Maps

	Name	Title ▾	Owner
1	<input type="checkbox"/> FinanceEF_1_3_11_2	Year-End Closing Checks	QAD
2	<input type="checkbox"/> FinanceEF_1_3_11	Year-End Closing	QAD
3	<input type="checkbox"/> eob_tms_work_set	Workflow Set Up	QAD
4	<input type="checkbox"/> eob_eam_woor_def	Work Order(s)	QAD
5	<input type="checkbox"/> Make_2_3	Work Order Reports	QAD
6	<input type="checkbox"/> Plan_4_2_1_1	Work Order Bills and Routes	QAD
7	<input type="checkbox"/> EAMWork_4	Work in EAM	QAD
8	<input type="checkbox"/> EAMWork_5	Work in EAM	QAD

Link  ▾



 QAD 24

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** 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

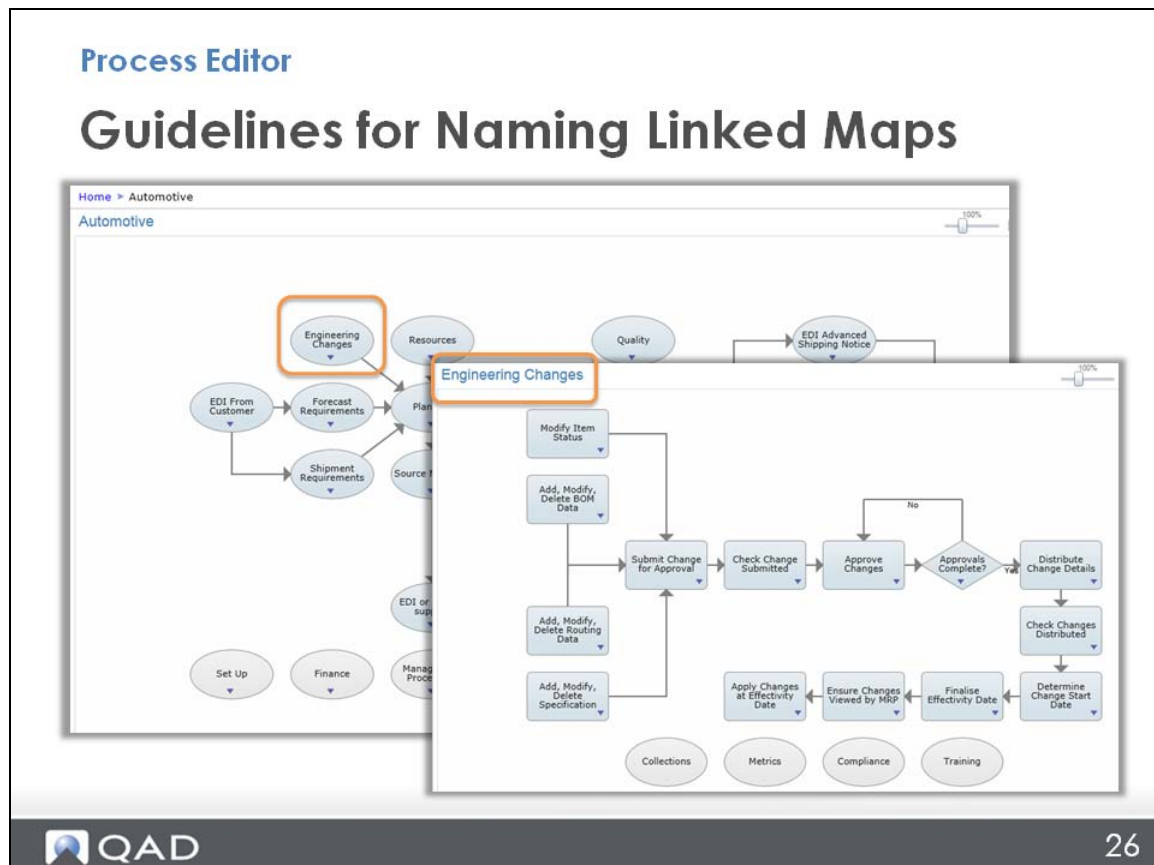
### Process Editor

### Exercise: Linking to Process Maps

1. Select the Process List Lookup option
2. Choose the "Schedule" process map
3. Check the link in Preview

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

**Process Editor**

### Finding the Name of a Map

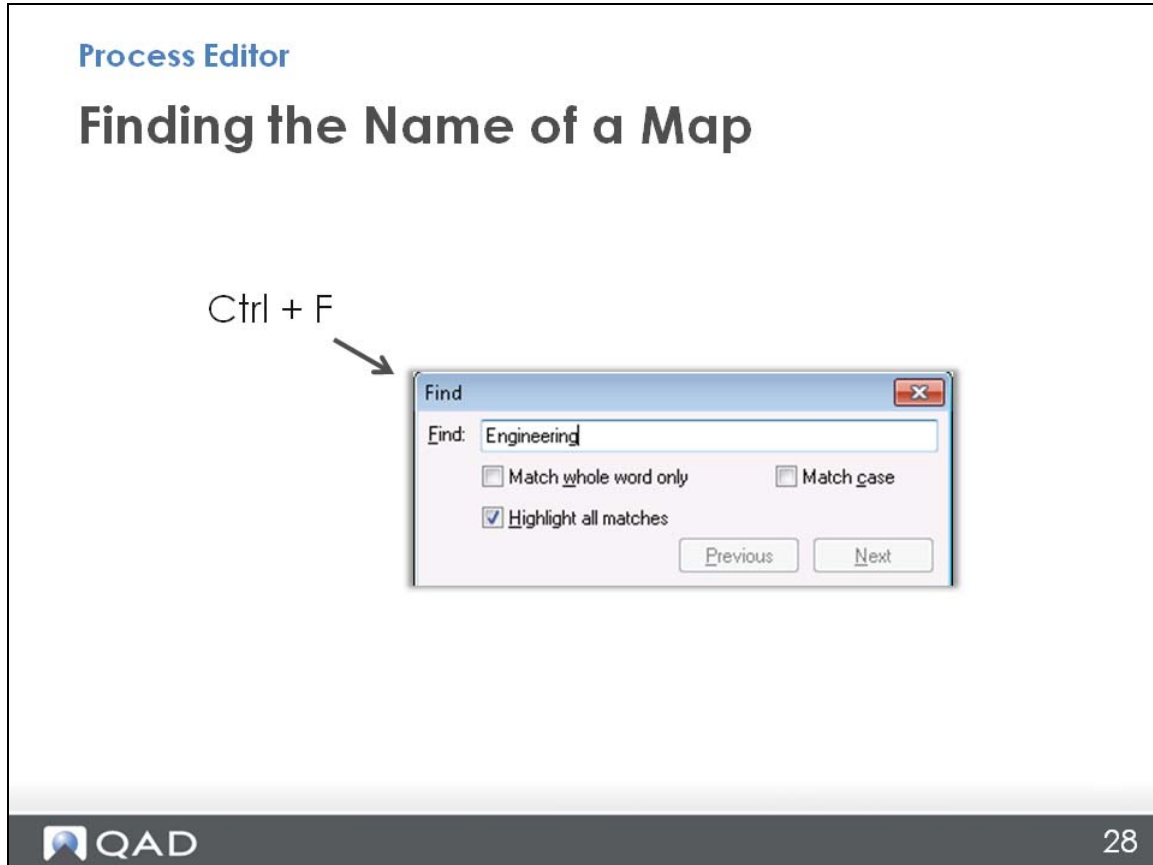
The screenshot displays the QAD Process Editor interface. The main window shows a process map titled 'Engineering Changes' with a flowchart. The flowchart consists of three steps: 1. 'Modify Item Status', 2. 'Add, Modify, Delete BOM Data', and 3. 'Submit Change for Approval'. The 'Submit Change for Approval' step is highlighted with a red box. A 'Process List' lookup window is open, showing the details for the process map 'eob\_auto\_eng\_def'. The 'Name' field is highlighted with a red box and contains the text 'eob\_auto\_eng\_def'. The 'Title' field contains '{ENGINEERING\_CHANGES}' and the 'Owner' field contains 'QAD'. The 'Process List' window also shows various property tabs like Grid Properties, Style Properties, Process Properties, Connector Properties, Node Properties, and Row Properties. The QAD logo is visible in the bottom left corner, and the page number '27' is in the bottom right corner.

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.

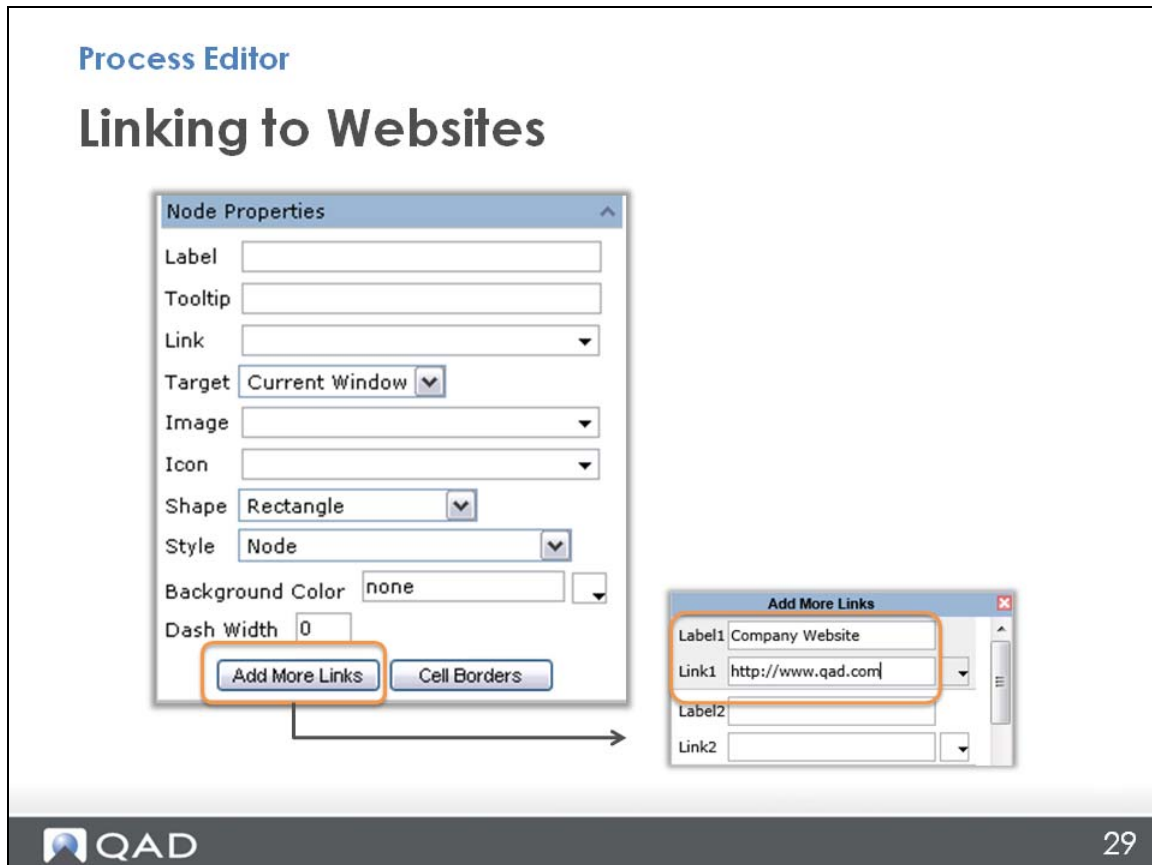
Click on the Process Editor icon, and you find the system name of the map at the top of the Process Editor and in the Name field.

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



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.”

## Process Editor

# Linking to Websites

The screenshot shows the Process Editor interface. On the left is the 'Node Properties' panel for a node named 'Test'. The 'Label' field contains '(SHIPMENT\_TRACKING)', the 'Link' field contains 'https://www.ups.com/tracking/tracking.html', and the 'Target' dropdown is set to 'New Window'. The 'Preview' window on the right shows a simulated browser view of the UPS tracking website. The website header includes the UPS logo and navigation tabs for 'My UPS', 'Shipping', 'Tracking', 'Freight', 'Locations', 'Support', and 'UPS Solutions'. The main content area is titled 'Tracking' and features a 'Track by Number' section with a text input field for tracking numbers and a 'Track' button. Below this are links for 'Track by Reference', 'Track by E-mail', 'Import Tracking Numbers', and 'SMS Tracking'. A 'Recently Tracked' section is also visible on the right side of the preview.

QAD 30

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

### Process Editor

### Exercise: Linking to Websites

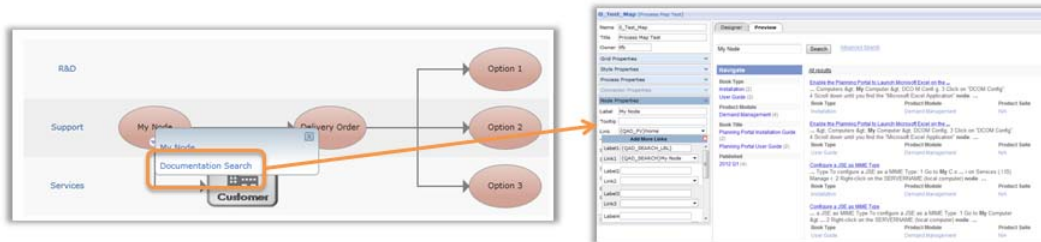
1. Open Node Properties for a node
2. Click Add More Links
3. Enter a Label1 name
4. In the Link field, enter <http://www.QAD.com>
5. Click Preview
6. Test the link

Next, do another exercise to practice linking to websites.

## Linking to the Document Library

### Process Editor

## Linking to the Document Library



Links can be created in 3 ways:

1. Manually
2. Programmatically
3. Through a QAD Services engagement



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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

### Process Editor

## Summary

- Files
- QAD Screens (menus)
- Other Process Maps (processes)
- Websites

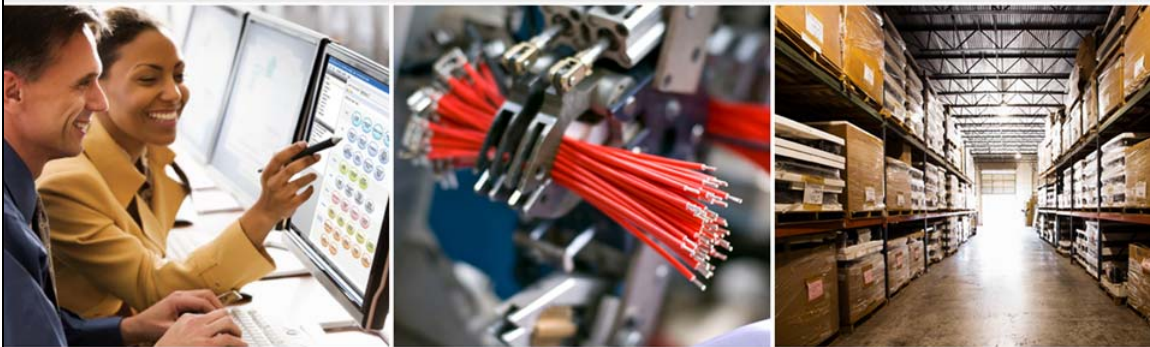
Now you know how to create links to all kinds of supporting resources for the steps in your process. In the next section, you will do an assignment to create links on your own process map.

Chapter 6

# Other Properties

## Process Editor Training

# Other Properties



Our Passion. Your Advantage.

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>

In this section, we will discuss the product costing process.

## Other Properties


The screenshot shows the 'Process Editor' window with the 'Other Properties' tab selected. On the left, there is a list of property categories: Grid, Style, Process, and Row/Column. On the right, a vertical stack of six dropdown menus is displayed, each with a downward arrow. The categories are: Grid Properties, Style Properties, Process Properties, Connector Properties, Node Properties, and Row Properties. The 'Row Properties' dropdown is currently selected and highlighted in a darker blue. At the bottom left of the window is the QAD logo, and at the bottom right is the number '2'.

**Process Editor**

### Other Properties

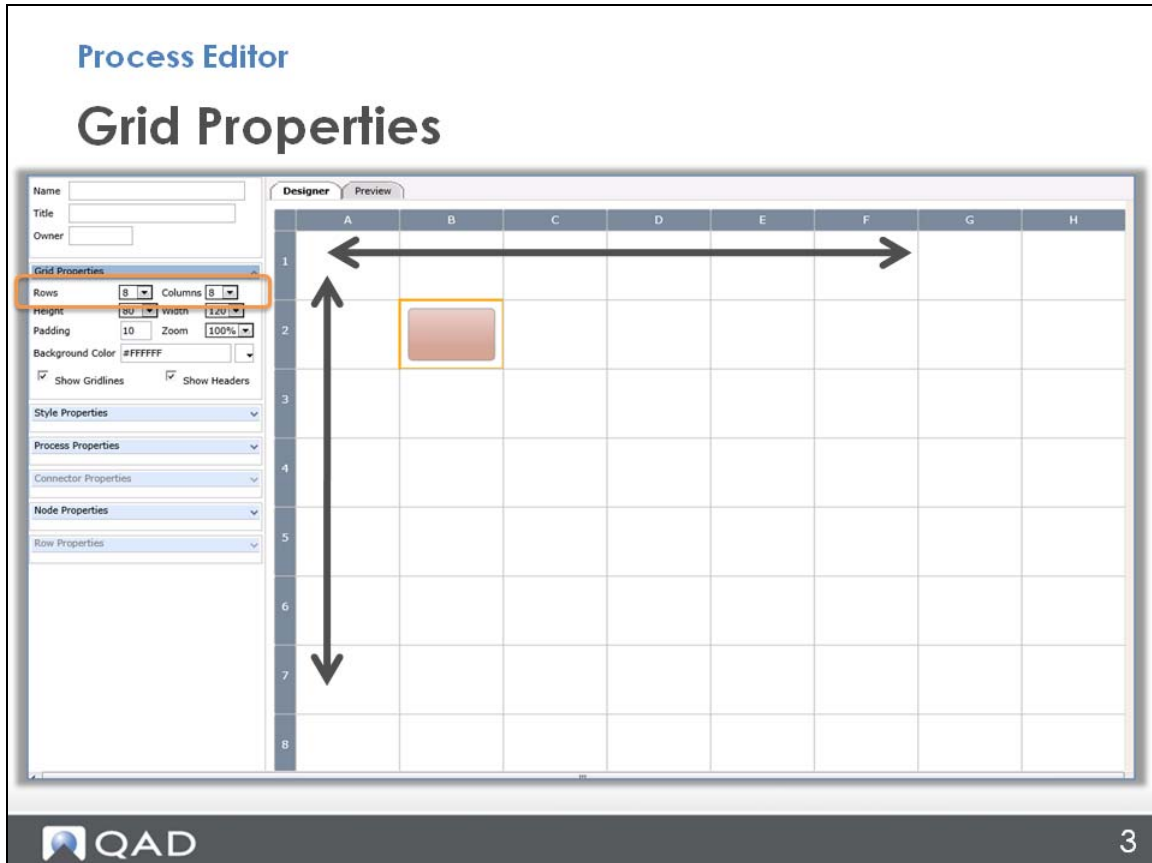
- Grid
- Style
- Process
- Row/Column

Grid Properties	▼
Style Properties	▼
Process Properties	▼
Connector Properties	▼
Node Properties	▼
Row Properties	▼

 QAD 2

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.

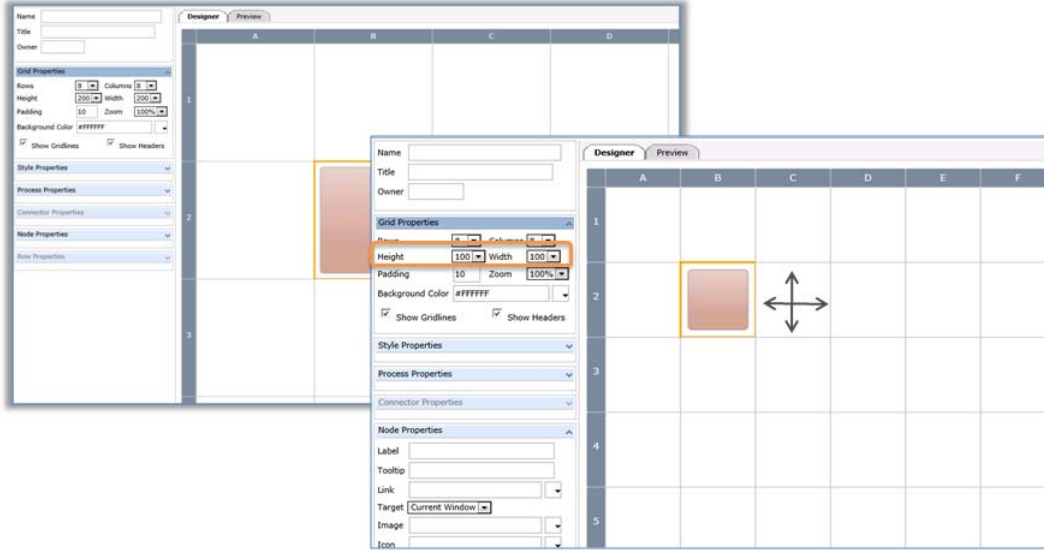
## Grid Properties – Height and Width

The screenshot displays the 'Process Editor' interface with the title 'Grid Properties – Height and Width'. On the left, a properties panel is visible, with the 'Grid Properties' section expanded. The 'Height' and 'Width' fields are highlighted with orange boxes and both contain the value '200'. Other visible settings include 'Padding' (10), 'Zoom' (100%), and 'Background Color' (#FFFFFF). The 'Designer' tab is active, showing a 3x4 grid with columns labeled A, B, C, and D, and rows labeled 1, 2, and 3. A red square is positioned in the cell at the intersection of column B and row 2, with a four-way arrow cursor over it, indicating it is selected for editing. The QAD logo and the number '4' are located at the bottom of the interface.

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

## Process Editor

# Grid Properties – Height and Width



## Grid Properties - Padding

The screenshot shows the 'Process Editor' interface with the 'Grid Properties - Padding' dialog box open. The dialog box has the following settings:

- Rows: 8
- Columns: 8
- Height: 80
- Width: 120
- Padding: 10 (highlighted with an orange box)
- Zoom: 100%
- Background Color: #FFFFFF
- Show Gridlines:
- Show Headers:

To the right of the dialog box are three 3x3 grid visualizations. Each grid has a central cell containing a blue rounded rectangle with a white number inside. The numbers are 10, 20, and 30, representing the padding value for each grid. The padding increases from 10 to 20 to 30, making the central node appear smaller and more centered within the cell.

QAD 6

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

The screenshot displays the QAD Process Editor interface. The main window is titled "Grid Properties - Zoom". On the left, there is a properties panel with several sections: "Name", "Title", "Owner", "Grid Properties", "Style Properties", "Process Properties", "Connector Properties", "Node Properties", and "Row Properties". The "Grid Properties" section is expanded, showing fields for "Rows" (8), "Columns" (8), "Height" (80), "Width" (120), "Padding" (10), and "Zoom" (200%). The "Zoom" field is highlighted with an orange box. Below these are checkboxes for "Show Gridlines" and "Show Headers". The main workspace shows a grid with three columns labeled "A", "B", and "C", and three rows labeled "1", "2", and "3". The grid is zoomed in 200%, as indicated by the text "200% Zoom" in the center. A red box highlights a cell in the second row and second column, which contains a rounded rectangular shape with a gradient fill.

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

Process Editor

### Grid Properties – Background Color

The screenshot displays the 'Process Editor' interface. On the left, the 'Grid Properties' panel is visible, with the 'Background Color' property set to '#0066FF' and highlighted by an orange box. The 'Designer' tab is active, showing a grid with 5 rows and 4 columns (A, B, C, D). The grid cells are blue, and a small orange rectangle is present in cell B2. The 'Preview' tab is also visible.

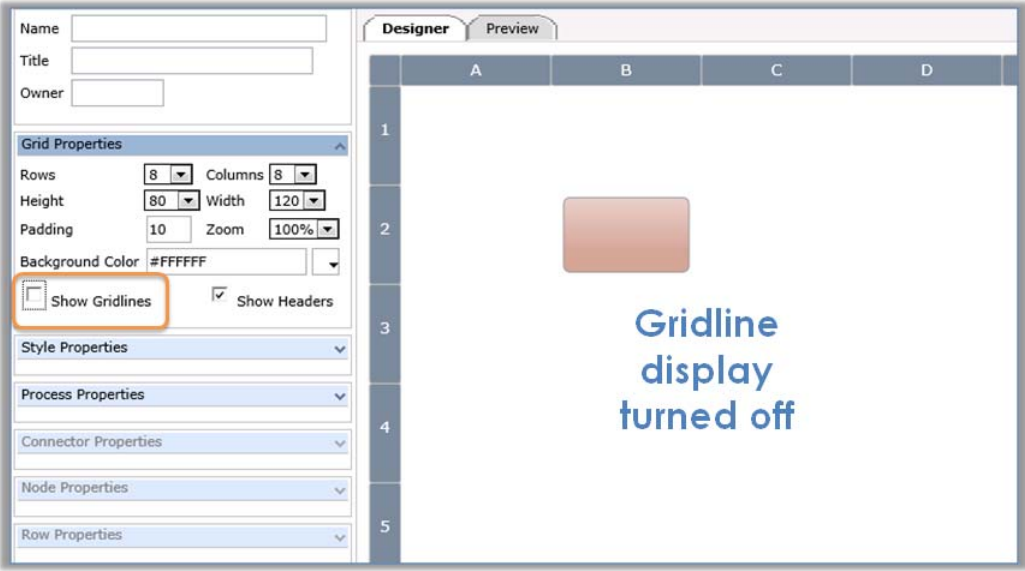
QAD 8

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

Process Editor

### Grid Properties – Grid Line Display



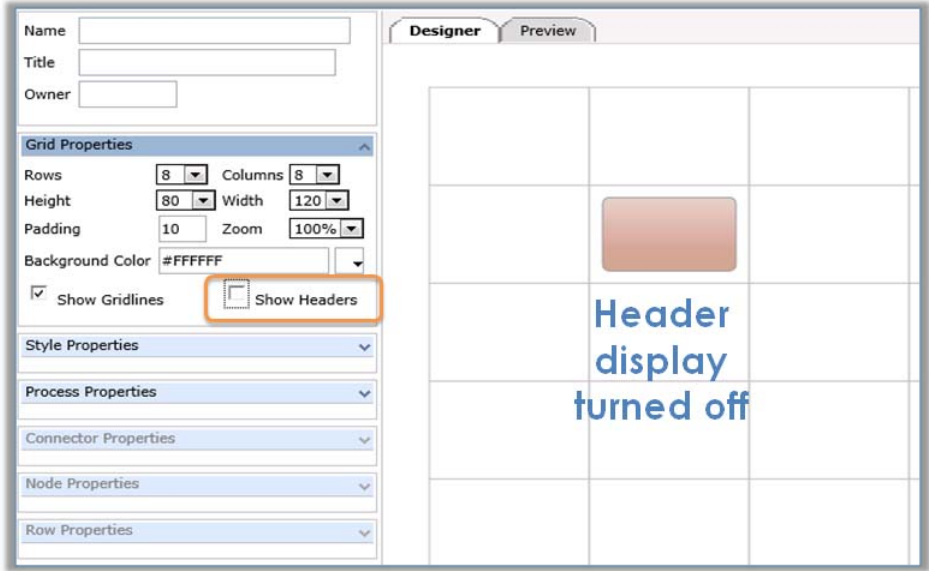
The screenshot displays the QAD Process Editor interface. On the left, the 'Grid Properties' panel is visible, featuring a 'Show Gridlines' checkbox that is checked and highlighted with an orange box. Other settings include Rows (8), Columns (8), Height (80), Width (120), Padding (10), Zoom (100%), and Background Color (#FFFFFF). The 'Show Headers' checkbox is also checked. Below the Grid Properties panel are sections for Style Properties, Process Properties, Connector Properties, Node Properties, and Row Properties. The main Designer view on the right shows a grid with columns A, B, C, and D, and rows 1, 2, 3, 4, and 5. A red rectangular box is positioned in the center of the grid, and the text 'Gridline display turned off' is displayed in blue below it. The QAD logo and the number 9 are visible in the bottom left and right corners of the interface, respectively.

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

## Grid Properties – Header Display

Process Editor

### Grid Properties – Header Display

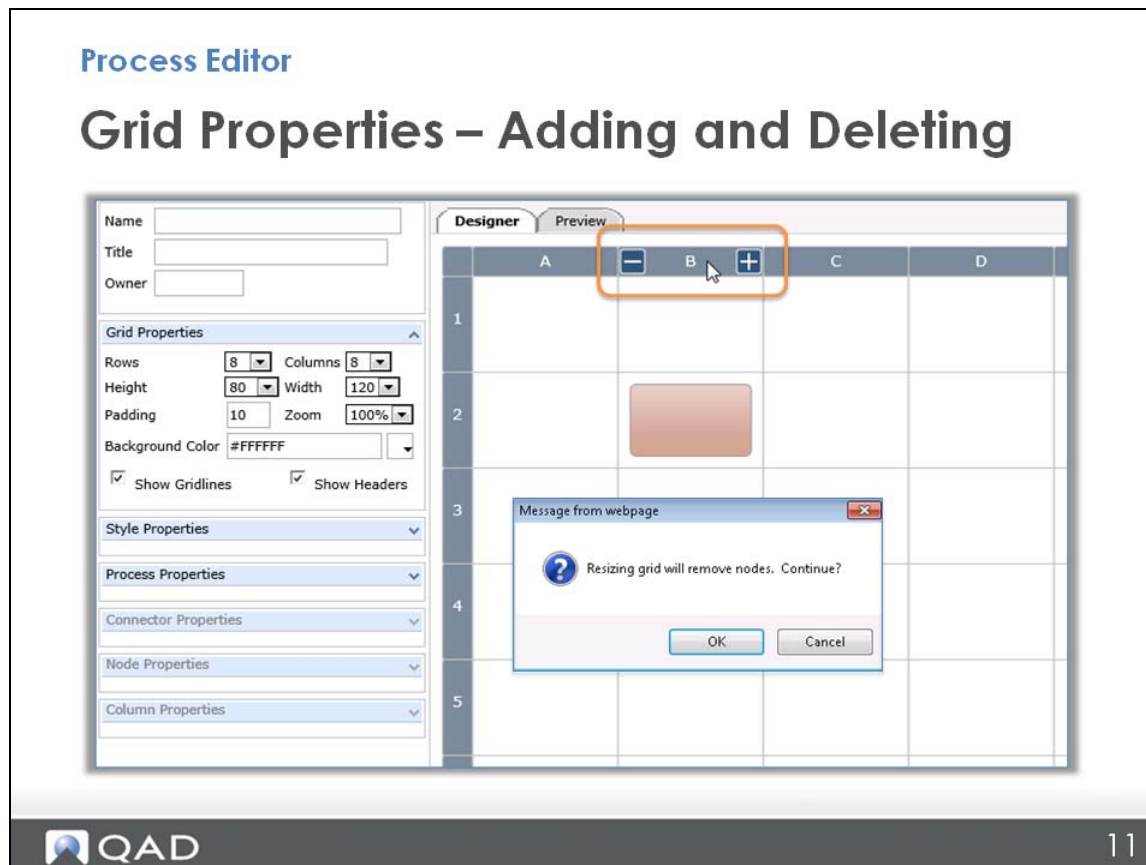


The screenshot shows the QAD Process Editor interface. On the left is the 'Grid Properties' panel, which includes fields for Name, Title, and Owner. Below these are sections for Grid Properties, Style Properties, Process Properties, Connector Properties, Node Properties, and Row Properties. The 'Grid Properties' section is expanded, showing 'Rows' set to 8, 'Columns' set to 8, 'Height' set to 80, 'Width' set to 120, 'Padding' set to 10, and 'Zoom' set to 100%. The 'Background Color' is set to #FFFFFF. The 'Show Gridlines' checkbox is checked, and the 'Show Headers' checkbox is also checked and highlighted with an orange box. On the right is the 'Designer' view, which shows a grid with a red button in the center and the text 'Header display turned off' overlaid on the grid.

QAD 10

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

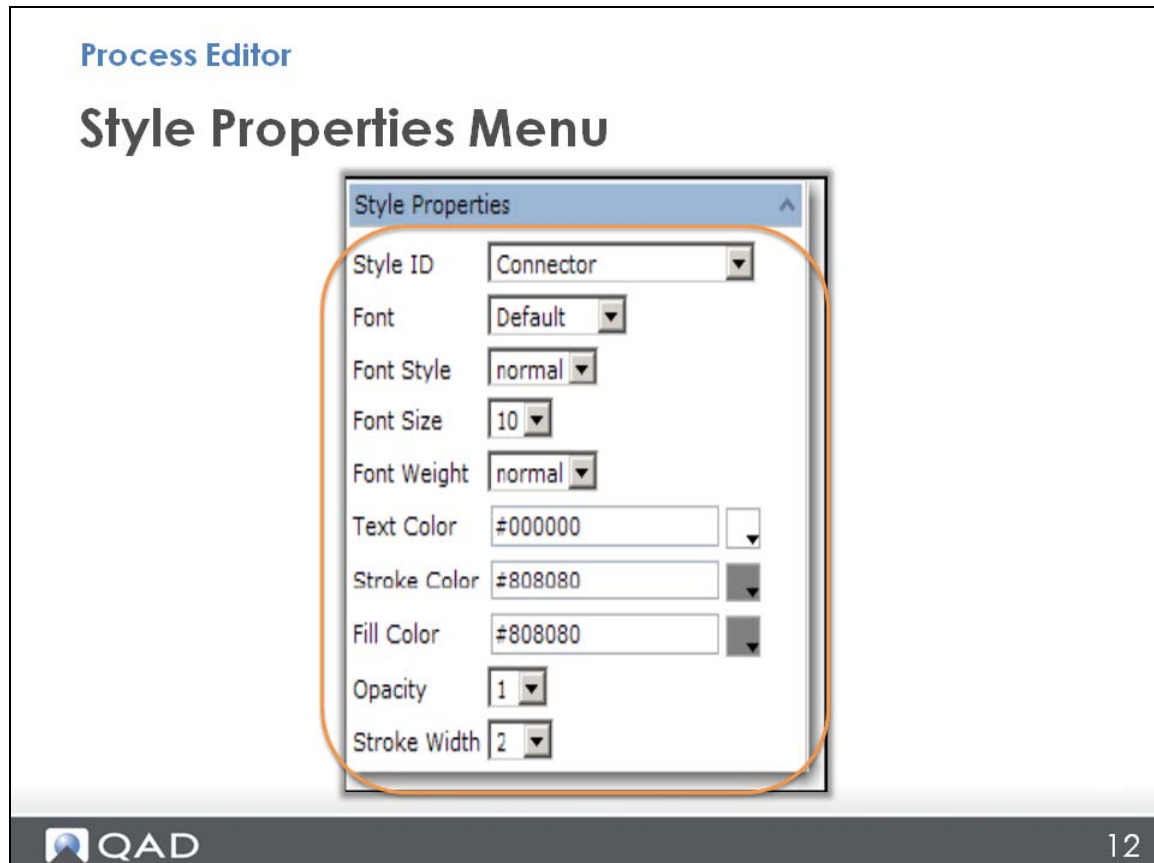
## Grid Properties – Adding and Deleting



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



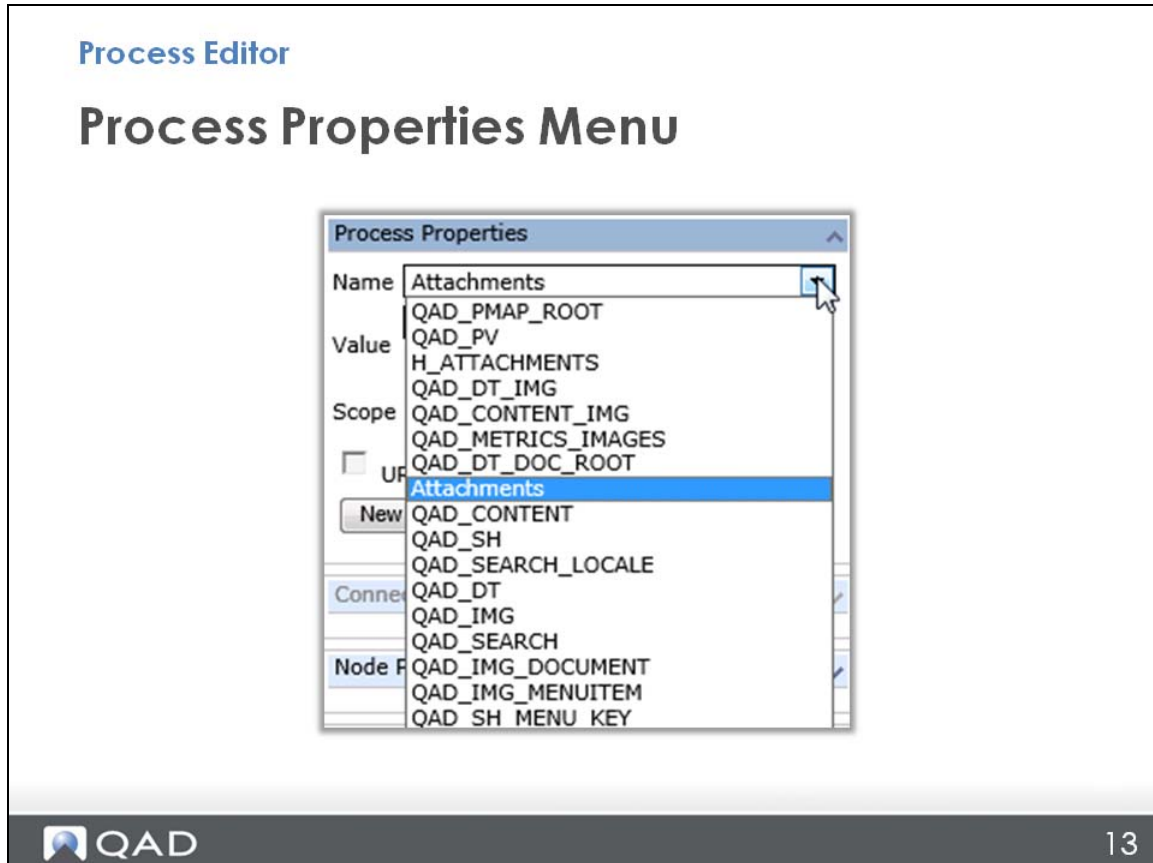
The Style Properties menu in Process Editor is used to change specific styles or designs associated with node shape and connectors.

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:

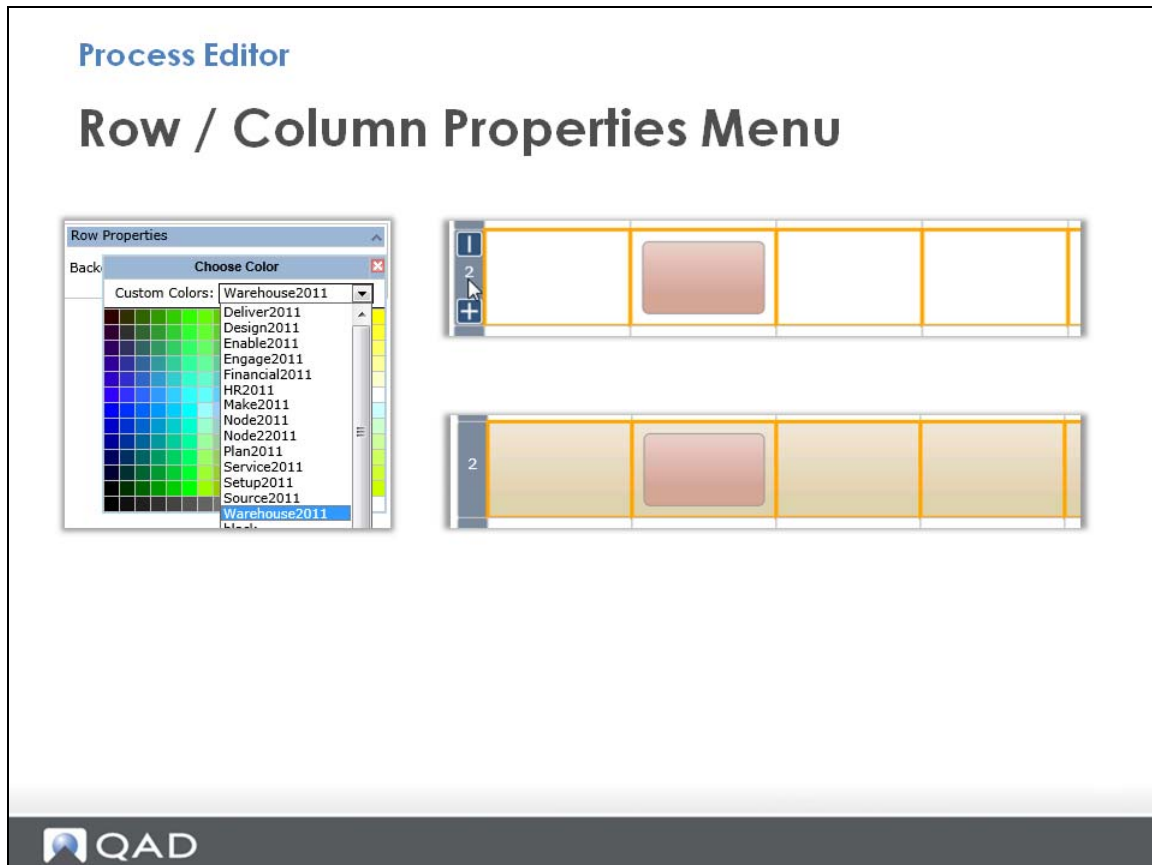
- **Style ID:** This is the ID of the style.
- **Font:** The font family associated with labels using this style.
- **Font Style:** The font style (normal or italic).
- **Font Size:** The font size (from 7 to 36 points).
- **Font Weight:** The font weight (lighter, normal, bold, or bolder).
- **Text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


**Process Editor**

### Summary: Other Properties

- Grid
- Style
- Process
- Row



Grid Properties	▼
Style Properties	▼
Process Properties	▼
Connector Properties	▼
Node Properties	▼
Row Properties	▼

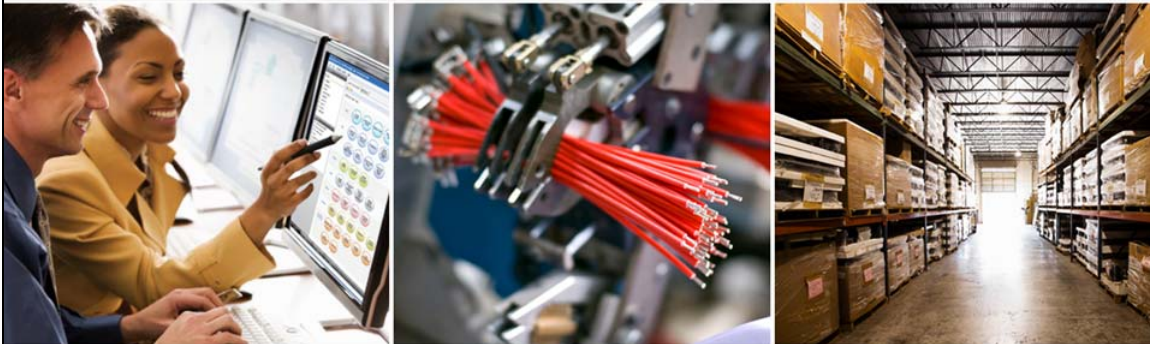
 QAD 15

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.

# Design Guidelines

Process Editor Training

## Design Guidelines



Our Passion. Your Advantage.

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

### Design Guidelines

## Back Up Your Process Maps

- Find xml files for your version of QAD Enterprise Applications



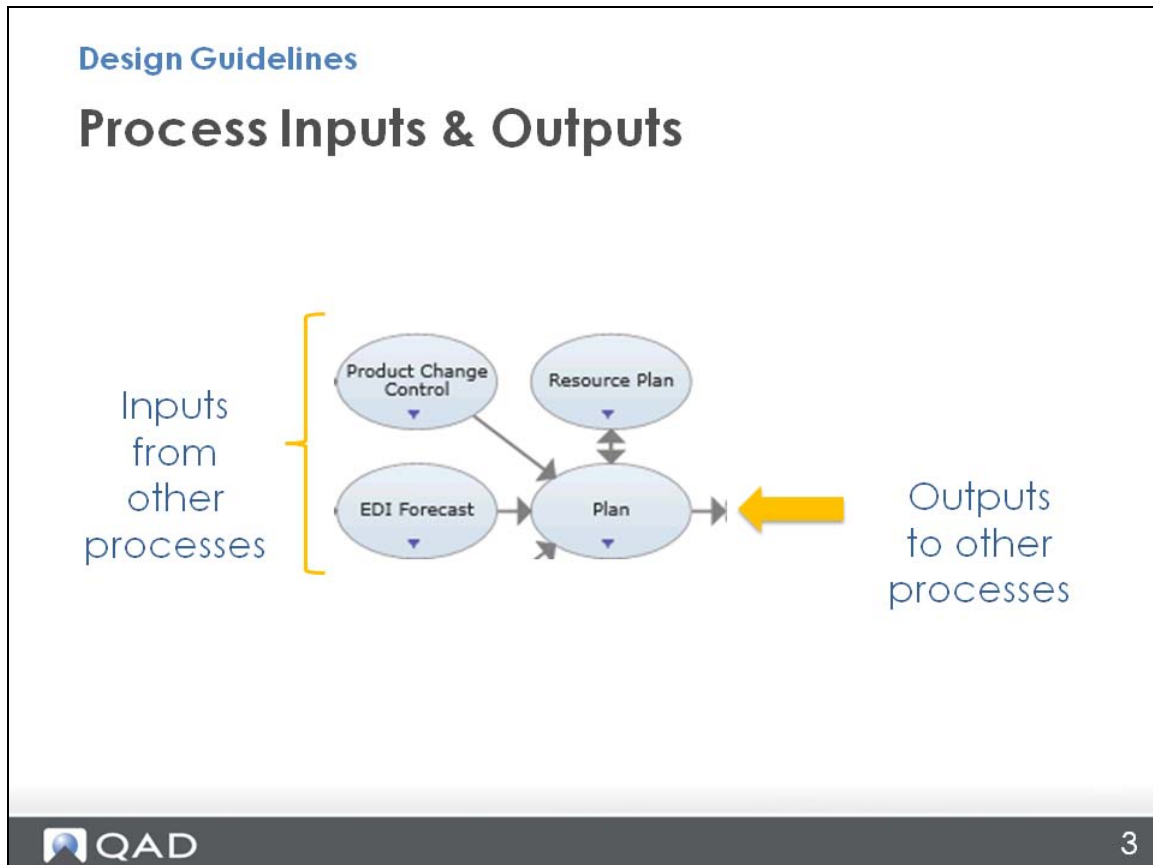
- eB2.1 = SE
- eB3 = EE
- Copy files to another folder as a backup
- See Appendix of this training for more info

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.

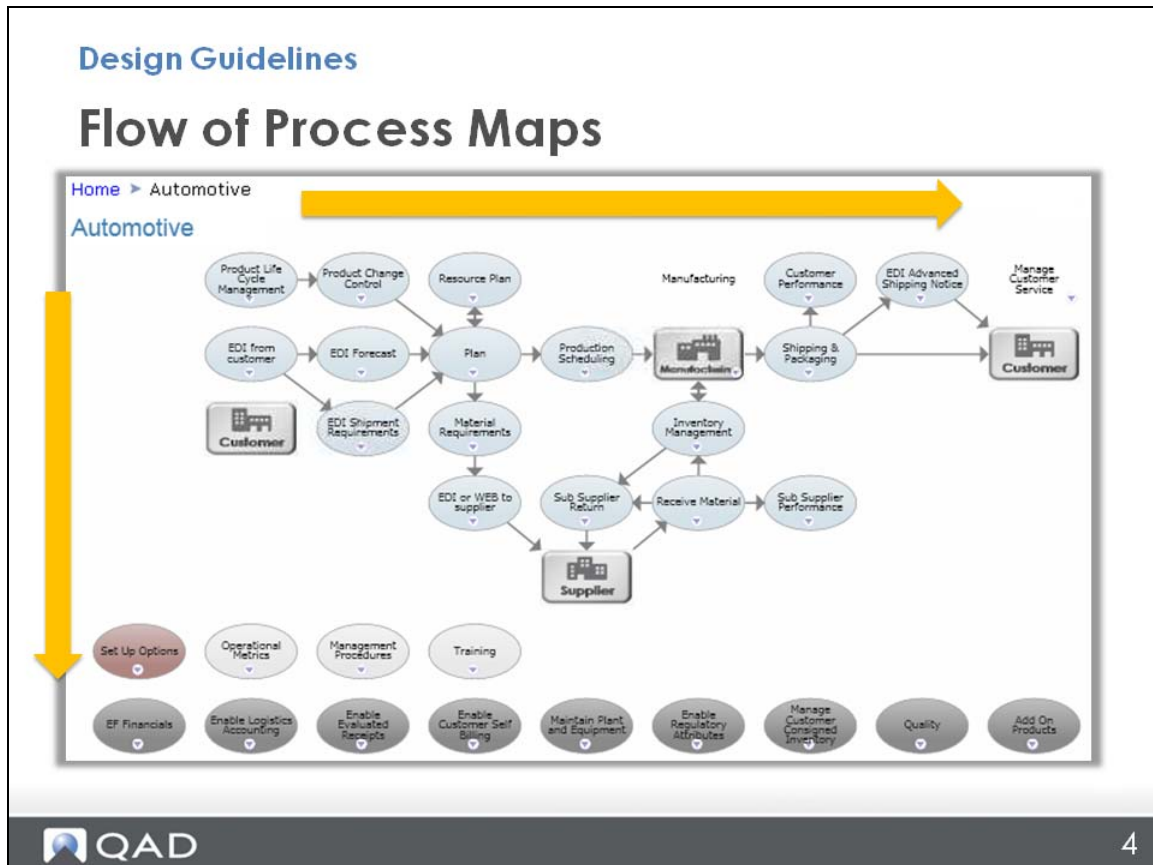
Reference the appendix of this training for information on how to do this.

## Process Inputs & Outputs



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

## Flow of Process Maps



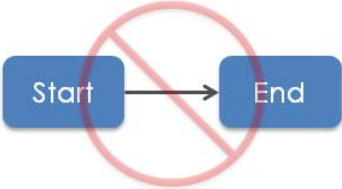
The generic flow of process maps is from left to right and from top to bottom. Most people think in these terms and it is easier to understand the flow.

## Nodes


**Design Guidelines**


### Nodes

- Don't make start and end nodes



• Use the right color



 QAD 5

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

**Design Guidelines**

### Dash Width

**Node Properties**

Label

Tooltip

Link

Target

Image

Icon

Shape

Style

Background Color

Dash Width

6

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.

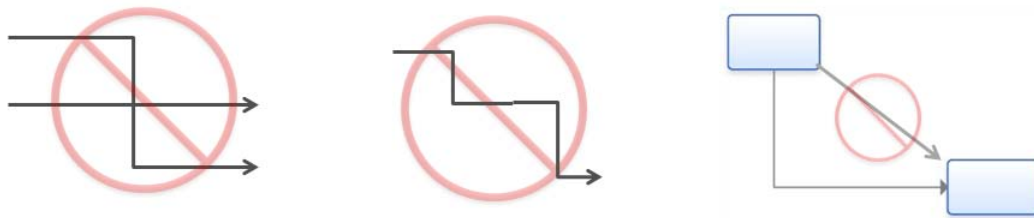
Instead, the node points you where you go; for example, an add-on product you do not have.

## Connectors

### Design Guidelines

## Connectors

- Never crisscross connectors
- Reduce number of elbows in one connector
- Use elbow connectors between nodes on different rows or columns if space allows



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

**Design Guidelines**

### Multiple Editors

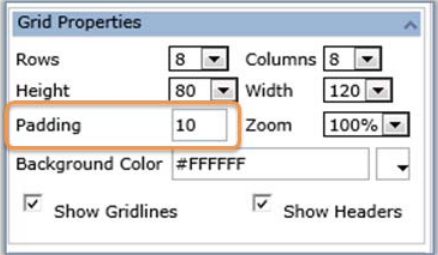
The screenshot shows the QAD Process Editor software interface. The main window is titled 'Auto [Automotive]' and contains a process map on a grid. The process map includes steps such as 'Product Life Cycle Management', 'Product Change Control', 'Resource Plan', 'EDI from customer', 'EDI Forecast', 'Plan', 'Production Scheduling', 'Material Requirements', 'EDl or WEB to supplier', and 'Sub Supplier Return'. The interface also features a menu bar (File, Edit, Tools, Workspace, Window, Help), a left-hand navigation pane with categories like 'Applications', 'Financials', 'Master Data', 'System Administration', 'Processes', and 'Administration', and a central workspace with a grid and process flow elements. The QAD logo is visible in the bottom left corner, and the number '8' is in the bottom right corner.

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

**Design Guidelines**

### Padding



Grid Properties


Rows: 8 | Columns: 8

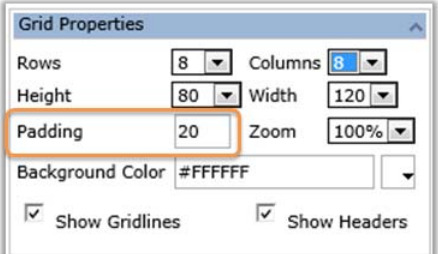
Height: 80 | Width: 120

Padding: 10 | Zoom: 100%

Background Color: #FFFFFF

Show Gridlines  Show Headers





Grid Properties

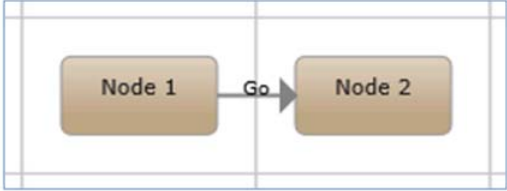
Rows: 8 | Columns: 8


Height: 80 | Width: 120

Padding: 20 | Zoom: 100%

Background Color: #FFFFFF

Show Gridlines  Show Headers




9

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.

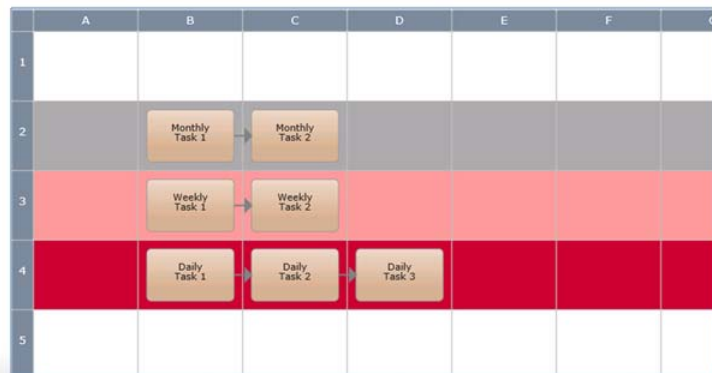
However, note that when you change the padding of a cell, you are changing it in Grid Properties, so it affects all the cells in the whole grid.

## Process Maps Guidelines

### Design Guidelines

## Process Maps Guidelines

- Strive for flat structure
- Separate setup and run maps
- Use row background colors to create “swim lanes” that indicate different departments or timelines



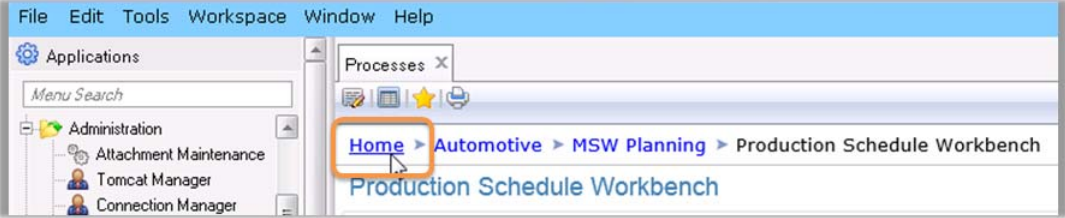
Here are some other design guidelines.

- 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.

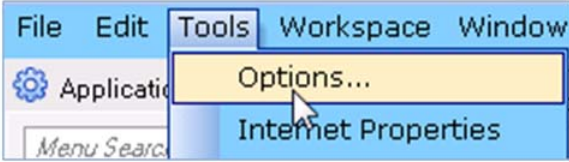
## Display Process Maps on Home Screen


**Design Guidelines**

### Display Process Maps on Home Screen



- Tools
- Options



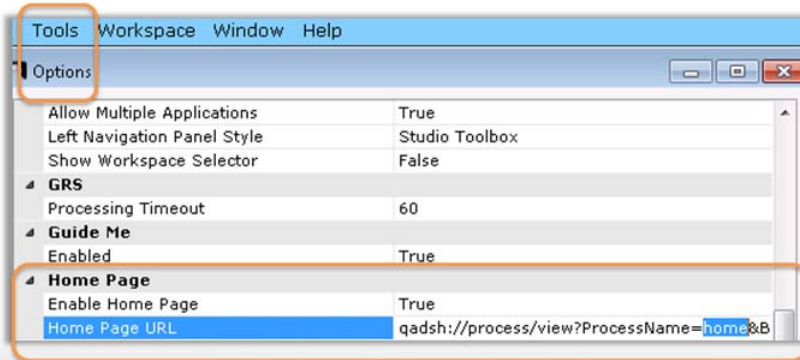
 11

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

## Design Guidelines

# Display Process Maps on Home Screen

- In Options, scroll down to “Home Page” section.
- In the URL address, delete “home” and replace it with the name of the process map you want.



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

### Design Guidelines

## Summary

- Backup
- Process flow
  - Left to right
  - Top to bottom
- Nodes
  - Do not have start/end nodes
  - Use correct colors/styles
- Connectors
  - Do not crisscross
  - Use elbow connectors between rows if possible
  - Reduce number of bends in one connector



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.

## Design Guidelines

### Summary

- Keep more than one Editor open at a time
- Reduce padding to make connectors fit better
- Set your favorite map as your home page

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

### Design Guidelines

## Summary

- Keep more than one Editor open at a time
- Reduce padding to make connectors fit better
- Set your favorite map as your home page



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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

## Process Editor Training

# 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:

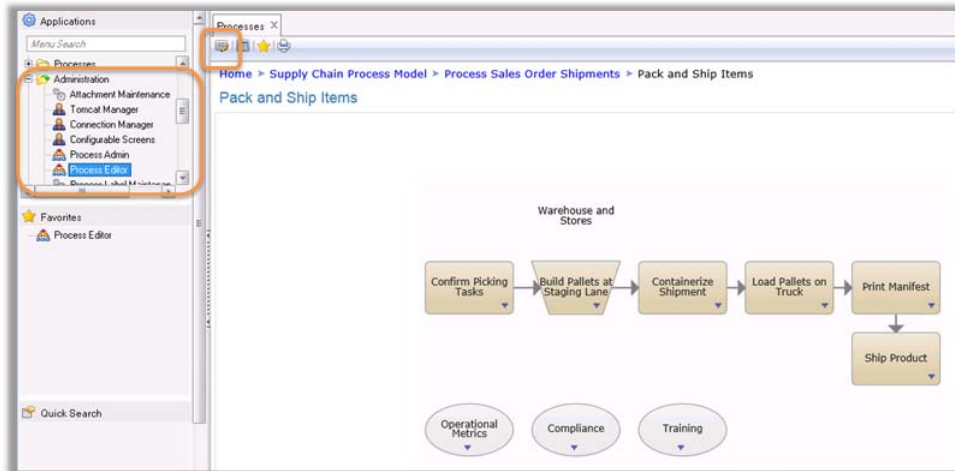
<https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?selectTab=OLT+Activities>

## Open the Map in the Editor

### Editing a Map

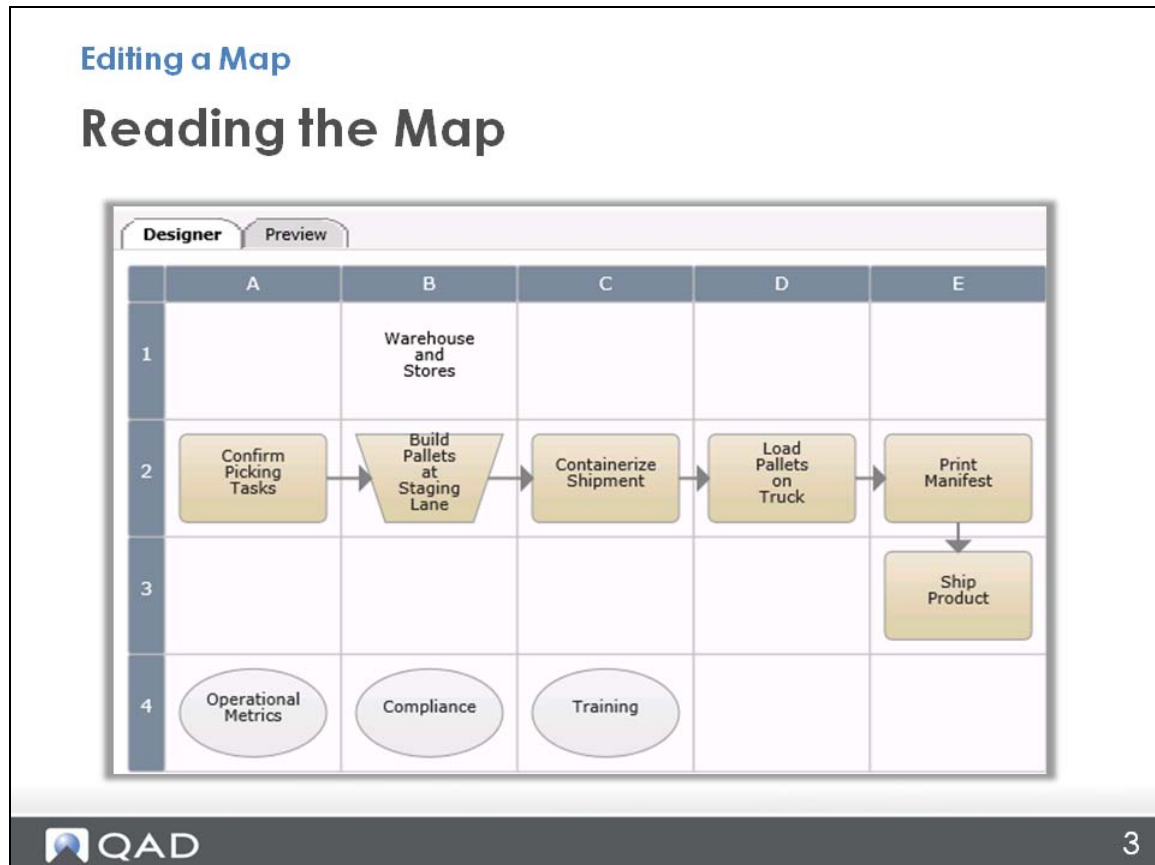
## Open the Map in the Editor

- From left menu (Admin/Process Editor)
- From process map (with Editor icon)



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.

## Editing a Map

# Reading the Map

The screenshot displays the QAD Process Map Designer interface. On the left, the 'Node Properties' pane is open for the 'Confirm Picking Tasks' node. The properties include:

- Name: Warehouse\_6\_6
- Title: {PACK\_AND\_SHIP\_ITEMS}
- Owner: QAD
- Grid Properties, Style Properties, Process Properties, and Connector Properties are collapsed.
- Node Properties:
  - Label: {CONFIRM\_PICKING\_TASKS}
  - Tooltip: (empty)
  - Link: {QAD\_SH}whexbpk2.p
  - Target: Current Window
  - Image: (empty)
  - Icon: (empty)
  - Shape: Rectangle
  - Style: 2011 Warehouse
  - Background Color: #F9F9F9
  - Dash Width: 0

The main workspace shows a process map on a grid with columns A-E and rows 1-4. The process flow is as follows:

- Row 1: Warehouse and Stores (B)
- Row 2: Confirm Picking Tasks (A) → Build Pallets at Staging Lane (B) → Containerize Shipment (C) → Load Pallets on Truck (D) → Print Manifest (E)
- Row 3: Ship Product (E)
- Row 4: Operational Metrics (A), Compliance (B), Training (C)

The QAD logo is visible in the bottom left corner, and the number 4 is in the bottom right corner.

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

### Editing a Map

## Plan your Changes

- Consider how to reflect your company's processes accurately ... do you need to:
  - Add/delete/modify:
    - Steps?
    - Links?
  - Change node label names to use your terminology?
  - Add images, icons, background colors?
- Plot your changes on paper, in PowerPoint or other software, or make them directly in the Editor



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

### Editing a Map

## Copying a Map

- Change the name (following conventions)
- Save the 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

### Editing a Map

## Making Modifications

Name: Warehouse\_6\_6

Title: {PACK\_AND\_SHIP\_ITEMS}

Owner: QAD

Grid Properties

Style Properties

Process Properties

Connector Properties

**Node Properties**

Label: {CONFIRM\_PICKING\_TASKS}

Tooltip:

Link: {QAD\_SH}whexbpc2.p

Target: Current Window

Image:

Icon:

Shape: Rectangle

Style: 2011 Warehouse

Background Color: #F9F9F9

Dash Width: 0

**Designer** Preview

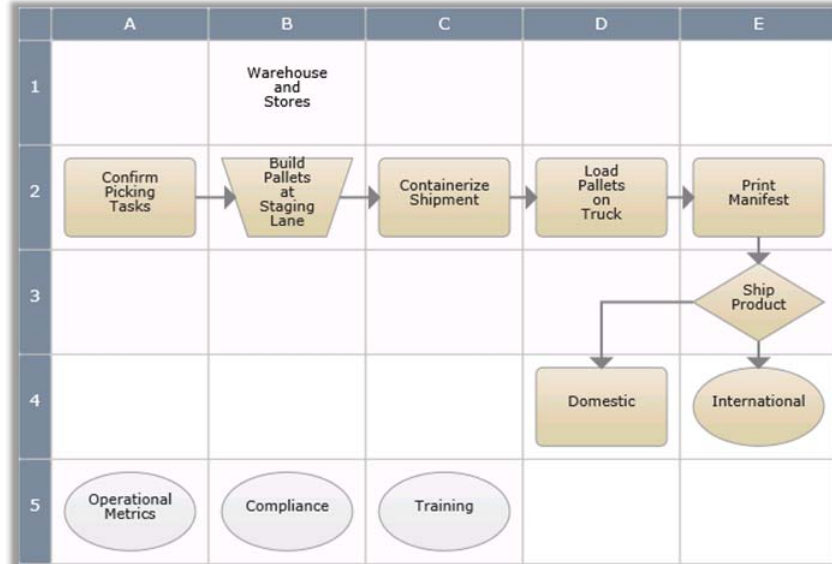
	A	B	C	D	E
1		Warehouse and Stores			
2	Confirm Picking Tasks	Build Pallets at Staging Lane	Containerize Shipment	Load Pallets on Truck	Print Manifest
3					Ship Product
4	Operational Metrics	Compliance	Training		

7

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 in.)

## Editing a Map

## 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

**Editing a Map**

### Adding Links

The screenshot displays the QAD Process Map Designer interface. On the left is a properties panel for the selected node, and on the right is a grid-based process map.

**Properties Panel:**

- Name: Our\_Company\_Warehouse\_6\_6
- Title: {PACK\_AND\_SHIP\_ITEMS}
- Owner: Company ID
- Grid Properties: [Dropdown]
- Style Properties: [Dropdown]
- Process Properties: [Dropdown]
- Connector Properties: [Dropdown]
- Node Properties:
  - Label: {DOMESTIC}
  - Tooltip: [Text Box]
  - Link: {QAD\_SH}whrfshtr.p
  - Link1: {QAD\_SEARCH}Ship Product
  - Label1: QAD\_SEARCH\_LBL
  - Label2: [Text Box]

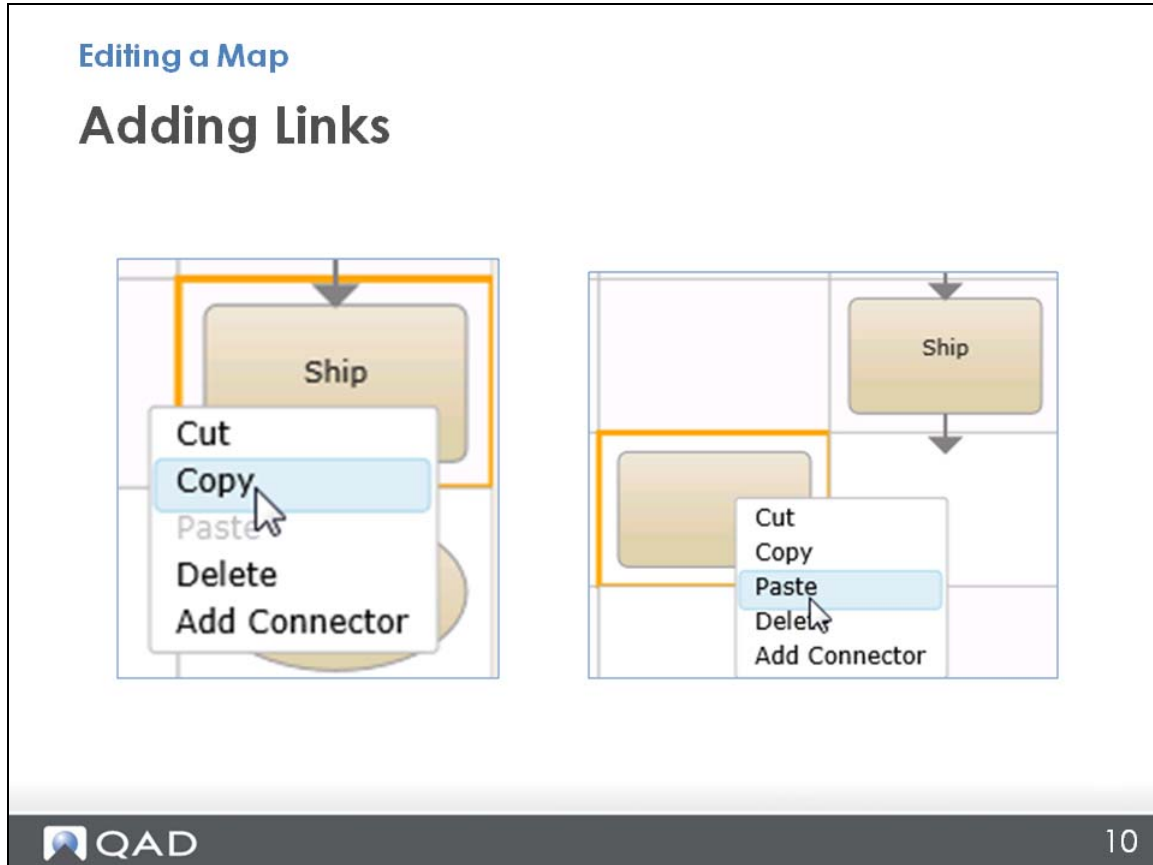
**Process Map Grid:**

	A	B	C	D	E
1		Warehouse and Stores			
2	Confirm Picking Tasks	Build Pallets at Staging Lane	Containerize Shipment	Load Pallets on Truck	Print Manifest
3				Ship Product	
4				Domestic	International
5	Operational Metrics	Compliance	Training		

The workflow starts with 'Confirm Picking Tasks' (A2) leading to 'Build Pallets at Staging Lane' (B2), then 'Containerize Shipment' (C2), 'Load Pallets on Truck' (D2), and 'Print Manifest' (E2). From 'Print Manifest', the flow goes to a decision diamond 'Ship Product' (E3). From 'Ship Product', the flow branches to 'Domestic' (D4) and 'International' (E4). The 'Domestic' node is highlighted with a yellow border.

**QAD** 9

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 ...



... 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

### Editing a Map

# Copy/Paste/Delete

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

## Adding Nodes

### Editing a Map

## Adding Nodes

Name: Our\_Company\_Warehouse\_6\_6

Title: {PACK\_AND\_SHIP\_ITEMS}

Owner: Company ID

Grid Properties

Style Properties

Process Properties

Connector Properties

**Node Properties**

Label: {INTERNATIONAL}

Tooltip:

Link: {QAD\_PV}Our\_Intl\_Shpt

Target: New Window

Image:

Icon:

Shape: Ellipse

Style: 2011 Warehouse

Designer Preview

	A	B	C	D	E
1		Warehouse and Stores			
2	Confirm Picking Tasks	Build Pallets at Staging Lane	Containerize Shipment	Load Pallets on Truck	Print Manifest
3					Ship Product
4				Domestic	International
5	Operational Metrics	Compliance	Training		

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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

**Editing a Map**

### Adding a Node

The screenshot displays the QAD Process Map Designer interface. On the left, a properties panel for a node is visible, with the following details:

- Name: Our\_Company\_Warehouse\_6\_6
- Title: {PACK\_AND\_SHIP\_ITEMS}
- Owner: 2011 Design, 2011 Enable, 2011 Engage, 2011 Financial, 2011 HR, 2011 Make, 2011 Node (selected), 2011 Plan, 2011 Service, 2011 Setup, 2011 Source
- Process: 2011 Warehouse
- Connector: Connector, Link Node, Mouse Over Node
- Label: Plan, Source
- Tooltip: Make, Deliver
- Link: Warehouse Mgmt, Financial & Acct Mgmt
- Target: Human Resource Mgmt, Setup
- Image: Style 1, Style 2, Style 3, Style 4
- Icon: Style 3, Style 4
- Shape: Text Node
- Style: 2011 Node2

The main workspace shows a process map on a grid with columns A-E and rows 1-5. The map includes the following elements:

- Row 1: Warehouse and Stores (text)
- Row 2: Confirm Picking Tasks (rectangle) → Build Pallets at Staging Lane (trapezoid) → Containerize Shipment (rectangle) → Load Pallets on Truck (rectangle) → Print Manifest (rectangle)
- Row 3: Ship Product (diamond)
- Row 4: Domestic (rectangle), International (oval)
- Row 5: Operational Metrics (oval), Compliance (oval), Training (oval), Our Internal Training (document icon, highlighted with a yellow border)

Arrows indicate flow from the sequence in row 2 to the diamond in row 3, and from the diamond to the shapes in row 4. A yellow box highlights the 'Our Internal Training' node in row 5, column D.

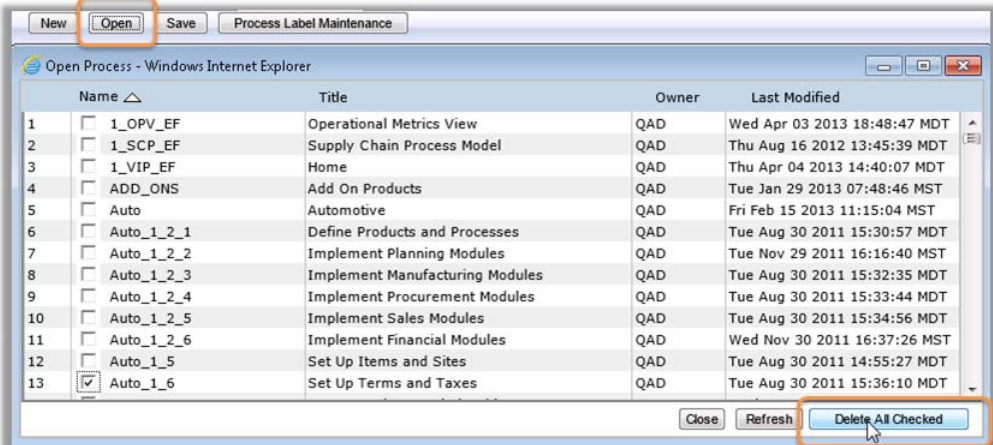
**QAD** 13

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

## Deleting a Map

Editing a Map

### Deleting a Map



	Name	Title	Owner	Last Modified
1	<input type="checkbox"/> 1_OPV_EF	Operational Metrics View	QAD	Wed Apr 03 2013 18:48:47 MDT
2	<input type="checkbox"/> 1_SCP_EF	Supply Chain Process Model	QAD	Thu Aug 16 2012 13:45:39 MDT
3	<input type="checkbox"/> 1_VIP_EF	Home	QAD	Thu Apr 04 2013 14:40:07 MDT
4	<input type="checkbox"/> ADD_ONS	Add On Products	QAD	Tue Jan 29 2013 07:48:46 MST
5	<input type="checkbox"/> Auto	Automotive	QAD	Fri Feb 15 2013 11:15:04 MST
6	<input type="checkbox"/> Auto_1_2_1	Define Products and Processes	QAD	Tue Aug 30 2011 15:30:57 MDT
7	<input type="checkbox"/> Auto_1_2_2	Implement Planning Modules	QAD	Tue Nov 29 2011 16:16:40 MST
8	<input type="checkbox"/> Auto_1_2_3	Implement Manufacturing Modules	QAD	Tue Aug 30 2011 15:32:35 MDT
9	<input type="checkbox"/> Auto_1_2_4	Implement Procurement Modules	QAD	Tue Aug 30 2011 15:33:44 MDT
10	<input type="checkbox"/> Auto_1_2_5	Implement Sales Modules	QAD	Tue Aug 30 2011 15:34:56 MDT
11	<input type="checkbox"/> Auto_1_2_6	Implement Financial Modules	QAD	Wed Nov 30 2011 16:37:26 MST
12	<input type="checkbox"/> Auto_1_5	Set Up Items and Sites	QAD	Tue Aug 30 2011 14:55:27 MDT
13	<input checked="" type="checkbox"/> Auto_1_6	Set Up Terms and Taxes	QAD	Tue Aug 30 2011 15:36:10 MDT

Close Refresh **Delete All Checked**

QAD 14

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

### Editing a Map

## Summary

- Opening & reading maps
- Copying, modifying & deleting maps

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

## Additional Information in Appendix

### Process Map Editor Training

## Additional Information in Appendix

- Technology behind the maps
- Linking to Document Library
- Setting up EOB maps
- Making your maps appear in the menu

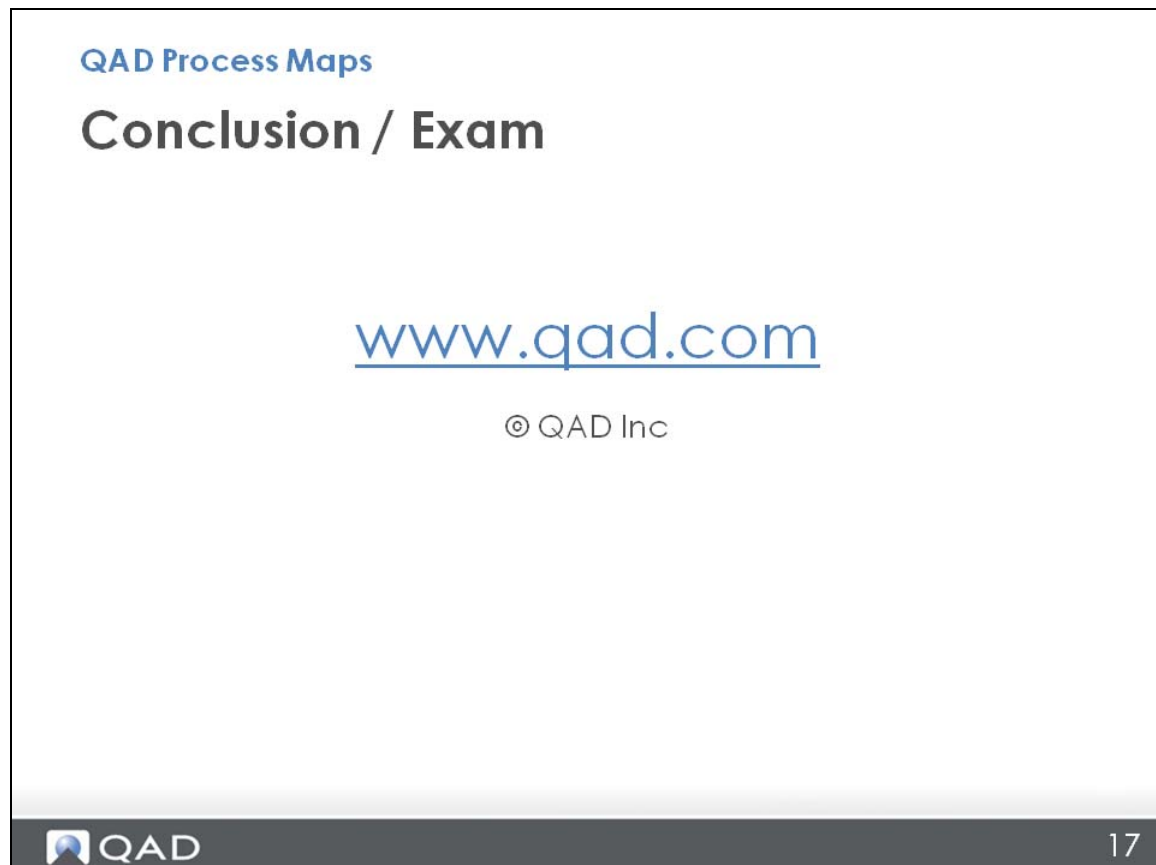


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We're concluding this training now, but there is some more information available in the Appendix of the training guide if you're interested.

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



The screenshot shows a slide with the following content:

- QAD Process Maps
- Conclusion / Exam
- [www.qad.com](http://www.qad.com)
- © QAD Inc

At the bottom of the slide, there is a dark grey bar containing the QAD logo on the left and the number 17 on the right.

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:

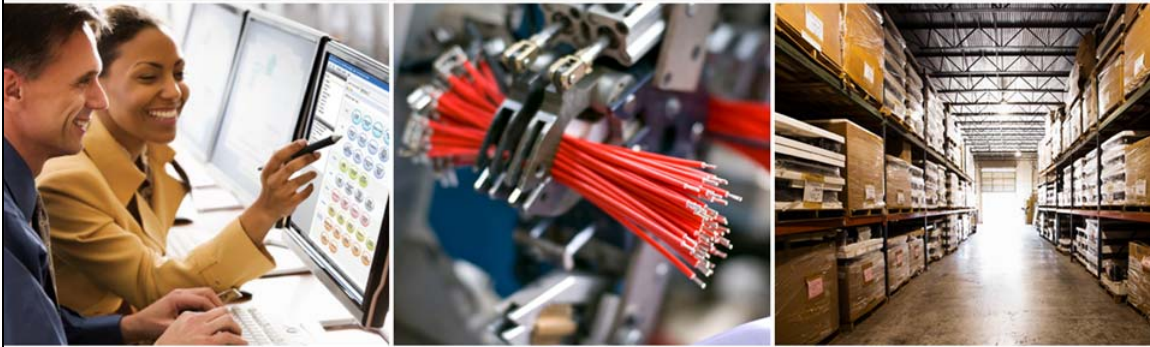
<https://gm1.geolearning.com/geonext/qad/coursesummary.CourseCatalog.geo?selectTab=OLT+Activities>

Appendix A

# Process Maps

Process Editor Training

# Appendix



Our Passion. Your Advantage.

## Technology Behind the Maps

### Process Editor Training - Appendix

## Technology Behind the Maps

- Process maps are rendered using Microsoft's **Silverlight** technology.
  - Silverlight is a programmable web browser plugin compatible with .NET applications.
- Process maps can also be viewed using standard **SVG**-based technology.
  - The scalable vector graphics (SVG) format is an XML technology for defining vector-based two-dimensional graphics for the web.
- You set the default display technology in Process Admin Context Parameters.

## Linking to the Document Library

### Process Editor Training - Appendix

## Linking to the Document Library

- Administration → Process Admin
- Click on Process Properties tab
- Enter the following items

<input type="checkbox"/>	QAD_SEARCH	stylesheet=portal_doclib&getfields="*&proxyreload=1&filter=p&access=p&q=	global ▾	<input type="checkbox"/>
<input type="checkbox"/>	QAD_SEARCH_LBL	Documentation Search	global ▾	<input type="checkbox"/>
<input type="checkbox"/>	QAD_SEARCH_LOCALE	en	global ▾	<input type="checkbox"/>

[http://search.qad.com/search?site=qad\\_proddoc&client=portal\\_doclib&output=xml\\_no\\_dtd&proxystylesheet=portal\\_doclib&getfields="\\*&proxyreload=1&filter=p&access=p&q=](http://search.qad.com/search?site=qad_proddoc&client=portal_doclib&output=xml_no_dtd&proxystylesheet=portal_doclib&getfields=)

- Click on Apply and Refresh



3

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

## Process Editor Training - Appendix

# Linking to the Document Library

Manual creation:

- In "Add More Links" window:
  - Add Label1: {QAD\_SEARCH\_LBL}  
(The label can be modified in the Process Admin screen)
  - Add Link1: {QAD\_SEARCH}**My Node**



How to link to the Document Library manually:

Label: {QAD\_SEARCH\_LBL}

Link: {QAD\_SEARCH}Enter your node name/label

## Process Editor Training - Appendix

# Linking to the Document Library

Programmatic Creation:

- Download pmapTrans.exe from:  
<https://share.qad.com/gm/document-1.9.724686>

<input type="checkbox"/>	QAD_SEARCH	stylesheet=portal_doclib&getfields="&proxyreload=1&filter=p&access=p&q="	global ▼	<input type="checkbox"/>
<input type="checkbox"/>	QAD_SEARCH_LBL	Documentation Search	global ▼	<input type="checkbox"/>
<input type="checkbox"/>	QAD_SEARCH_LOCALE	en	global ▼	<input type="checkbox"/>



5

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!

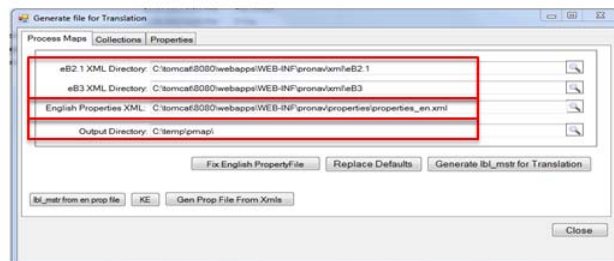
## Create Links to the Document Library

### 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



## Adding Custom Maps to the Menu

### Process Editor Training

## Adding Custom Maps to the Menu

1. Go to Menu System Maintenance
2. Accept Language ID – US
3. Enter Menu: 40
4. Select next available selection number



The screenshot shows a form with the following fields:

Language ID: us	english (U.S.)
Menu: 40	Process Maps
Selection: <input type="text" value="13"/>	

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.

## Process Editor Training

# Adding Custom Maps to the Menu

- 5. Label =** (what you want to appear in the menu)
- 6. Exec Procedure =** urn:pmap:(nameofmap)

The screenshot shows a configuration window with the following fields:

Language ID: us	english (U.S.)
Menu: 40	Process Maps
Selection: <input type="text" value="13"/>	
Label: Easy On-Boarding Automotive	
Name:	
Exec Procedure: urn:pmap:eob_auto_opt	

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

### Process Editor Training

## Adding EOB Maps to the Menu Items

1. Go to Menu System Maintenance
2. Accept Language ID – US
3. Enter Menu: 40
4. Select next available selection number
5. **Label** = Easy Onboarding Automotive
6. **Exec Procedure** = urn:pmap:eob\_auto\_opt
  - eob\_auto\_opt
  - eob\_food\_opt
  - eob\_conp\_opt
  - eob\_ind\_opt
  - eob\_elec\_opt
  - eob\_ls\_opt



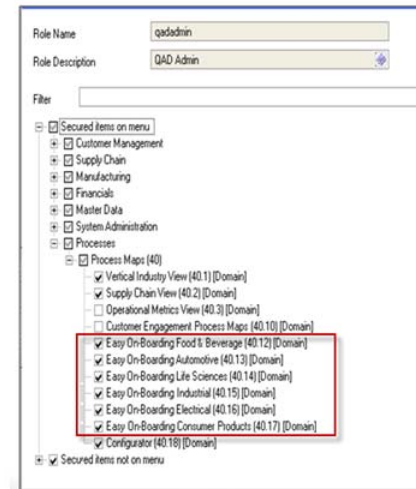
Here's an example of adding an Easy Onboarding Automotive map. Follow the same steps and then use one of these corresponding vertical map names as shown here.

## Creating Role Permission

### Process Editor Training

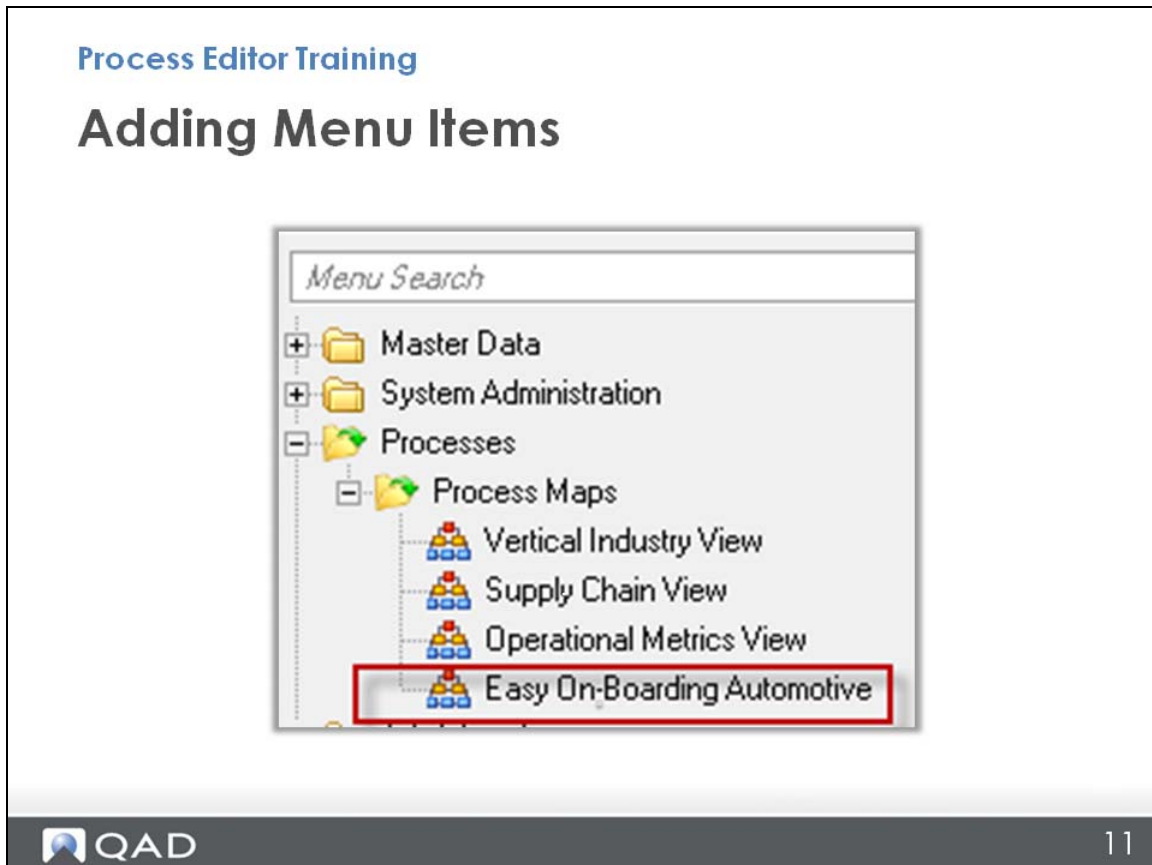
## Creating Role Permission

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



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

### Process Editor Training

## Additional Information

- Video: Thomas Blumer discusses setting up and configuring EOB Process Maps
- Title: Process Maps 2012.1
  - Watch this section: 15:50 – 17:10



Here is some additional training in the Learning Center.

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