

# **QAD Automation Solutions: Data Collection Transaction Release Notes, Version 2017 EE (2.2.0)**

**October 2017**

These release notes include information about QAD Automated Solutions: Data Collection transaction package.

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## QAD Automation Solutions: Data Collection Transactions

**Important** The QAD Automation Solutions: Data Collection transaction templates and workbenches that are delivered in this package are supported by QAD Services or a QAD Partner. Please note that because the templates are highly configurable and may be modified to meet any implementation requirements, you must use them at your own risk and discretion. In the event that you require support for any QAD Automation Solutions: Data Collection templates, contact QAD Services or a QAD Partner.

### Installation Information

For instructions on installing the QAD Automation Solutions: Data Collection transactions package, please see the *Automation Solutions: Data Collection Transactions Package Install Guide v2.2.0*.

### Compatibility

The following table outlines which QAD product versions are compatible and certified to work with Data Collection transaction banners.

Transaction Banners	Transaction Delivery Details	Certified On			
		QAD ERP	SAQ	Production Orders	EAM
EAM	Delivered in the EAM 2017.1EE module				2017.1EE
ERP Inventory	Delivered in the Data Collection Transaction Package v2.2.0	2017EE	SAQ 2.6.1		
ERP Inbound					
ERP Outbound					
ERP Production					
ERP Production (Orders)	Delivered in the Production Order Module	2016EE	2.6.1	1.2	

### Data Collection Transaction Package v2.2.0

The QAD Automation Solutions: Data Collection Transaction Package v2.2.0 contains the following transaction templates and template workbenches.

**Table 1**  
QAD Automation Solutions: Data Collection Transaction Package v2.2.0 (1 of 6)

Category / Banner	Task	Menu #	Transaction Name	.NET Menu Name (Menu #, Program)	Description	Exclusions and Limitations
Inventory	Inventory Transfer	1.1.1	Transfer - Item	Trans: Inventory Transfer with Lot Serial Change - Item App: Inventory Transfer with Lot/Serial Change (3.4.3, iclotr03.p)	Transfer ITEM between locations.	
Inventory	Inventory Transfer	1.1.3	Transfer - Lot	Trans: Inventory Transfer with Lot Serial Change - Lot App: Inventory Transfer with Lot/Serial Change (3.4.3, iclotr03.p)	Transfer LOT between locations.	
Inventory	Inventory Transfer	1.1.4	Transfer - Pack	Trans: Pack Transfer App: Pack Transfer (3.17.7, papatr01.p)	Transfer PACK between locations.	
Inventory	Packaging	1.3.1	Pack Create by Pack Code	Trans: Pack Create By Pack Code App: Pack Create by Pack Code (3.17.2, papacr01.p)	Create package ID (label) before receiving items/lots/serial inventory into it.	
Inventory	Packaging	1.3.3	Pack Build - Item	Trans: Pack Build - Item App: Pack Build (3.17.3, papabd.p)	Create/add Item, Lots, or Serialized inventory to a pack.	
Inventory	Packaging	1.3.4	Pack Build - LP	Trans: Pack Build - LP App: Pack Build (3.17.3, papabd.p)	Add an existing package to a new or existing parent package. For example, you can add several boxes to a pallet.	
Inventory	Packaging	1.3.5	Pack Merge	Trans: Pack Merge App: Pack Merge (3.17.15, papamg.p)	Merge packages together for packages with Active and Picked stages.	
Inventory	Packaging	1.3.10	Pack Remove	Trans: Pack Remove App: Pack Build (3.17.15, paparm.p)	Remove and transfer items or child packs from a master pack.	
Inventory	Packaging	1.3.15	Pack Commission	Trans: Pack Commission App: Pack Commission (3.17.4, papacm.p)	Activate an inactive serial ID, providing the ability for users to transact against it.	
Inventory	Packaging	1.3.16	Pack Decommission	Trans: Pack Decommission App: Pack Decommission (3.17.6, papadecm.p)	Decommission a license plate or serial ID, preventing transaction processing against it	

**Table 1**

QAD Automation Solutions: Data Collection Transaction Package v2.2.0 (2 of 6)

Category / Banner	Task	Menu #	Transaction Name	.NET Menu Name (Menu #, Program)	Description	Exclusions and Limitations
Inventory	Adjustment	1.7.1	Recount - Item	Trans: Inventory Adjustment Entry - Recount Item App: Inventory Adjustment Entry (3.13.2, icccaj.p)	Perform recount count for item.	
Inventory	Adjustment	1.7.2	Recount - Lot	Trans: Inventory Adjustment Entry - Recount Lot App: Inventory Adjustment Entry (3.13.2, icccaj.p)	Perform recount count for Lot.	
Inventory	Adjustment	1.7.5	Receipts - Unplanned	Trans: Receipts - Unplanned App: Receipts - Unplanned (3.9, icunrc.p)	Perform a receipt unplanned for item/lot.	
Inventory	Adjustment	1.7.6	Issues - Unplanned	Trans: Issues - Unplanned App: Issues - Unplanned (3.7, icunis.p)	Perform a issues unplanned for item/lot.	
Inventory	Adjustment	1.7.9	Item Tag Recount Entry	Trans: Pack Tag Recount Entry - LP App: Linked Trans: Tag Recount Entry linked (3.16.3.4, paptrc.p)	Perform a Tag Re-Count for packaged and loose inventory.	
Inventory	Adjustment	1.7.20	Internal Item Label	Trans: Internal Item Label	Print an internal item label.	
Inventory	Adjustment	1.7.21	Quality Label	Trans: Label Inbound Release-Reject App: NA	Print an item/lot quality label, identifying status of the item, such as rejected or approved.	
Inbound	Purchase Receipts	3.1.1	Purchase Order Receipt	Trans: Purchase Order Receipts App: Purchase Order Receipts (5.13.1, poporc.p)	Receive against discrete and scheduled orders.	Does not support regulatory and lot attributes.
Inbound	Purchase Receipts	3.1.3	PO Shipper Receipt	Trans: PO Shipper Receipt App: PO Shipper Receipt (5.13.20, rsporc.p)	Confirm a shipper receipt.	
Inbound	Purchase Receipts	3.1.4	PO Shipper Create by Pack	Trans: PO Shipper Maintenance by Pack App: PO.Shipper Maintenance (5.13.14, rsshmt.p)	Create a Shipper with packaging units. This is applicable when ASN's are not received via EDI or you desire to license plate incoming purchase receipts.	

**Table 1**  
QAD Automation Solutions: Data Collection Transaction Package v2.2.0 (3 of 6)

Category / Banner	Task	Menu #	Transaction Name	.NET Menu Name (Menu #, Program)	Description	Exclusions and Limitations
Inbound	Purchase Receipts	3.1.4.1	Linked	Trans: Pack Create by PO Shipper Version App: Pack Create by PO/Shipper (5.13.12.3, papocr.p)	Called as linked transaction to facilitate the creation of packs associated to a shipper.	There are many use cases not addressed with this configuration.
Inbound	Purchase Receipts	3.1.5	PO Unload by Pack	Trans: Pending PO Shipper Unload by Pack App: Pending PO Shipper Unload (5.13.12.13)	Receive packs, validating against a pre-shipper.	
Inbound	Purchase Receipts	3.1.7	DO Receipt by Pack	Trans: DO Receipt By Pack App: DO Receipt By Pack (12.9.13 padorc.p)	Confirm a shipper receipt of pack.	Configured to automatically decommission the pack upon receipt.
Inbound	Purchase Receipts	3.1.8	DO Unload	Trans: DO Unload App: DO Unload (12.9.15, padoul.p)	Receive packs, validating against a DO-shipper.	
Inbound	Purchase Receipts	3.1.15	Inventory Putaway	Trans: Production Order Item Putaway App: Inventory Transfer with Lot/Serial Change (3.4.3, iclotr03.p)	Direct material handlers where to putaway received materials.	For assistance on the putaway rule logic, please contact QAD Services.
Inbound	Purchase Receipts	3.1.20	Purchase Order Label	Trans: PO Label Print App: NA	Print/reprint inbound receipts label.	
Production	Production	5.3.1	WO Component Issue	Trans: Work Order Component Issue App: Work Order Component Issue (16.10, wowois.p)	Pick and issue materials to a work order. Note: If the material has already been picked, the system validates that the lot picked is the same lot issued.	
Production	Production	5.3.3	Kanban Consume/Fill	Kanban Fill/Receive (17.6.5, kbtr5.p)	Process Kanban transactions for both consume and fill.	
Production	Production	5.3.4	Backflush Transaction	Backflush Transaction (18.22.13, rebkfl.p) Linked Trans: Component Verify Scan	Report with backflush, for all operations, receiving into stock at final operation.	
Production	Production	5.3.6	Work Order Operation Backflush	Trans: Work Order Operation Backflush App: Work Order Operation Backflush (16.19, wobkfl.p)	Report with backflush, for all operations, receiving into stock at final operation.	
Production	Production	5.3.7	WO Receipt Backflush by Pack	Trans: WO Receipt Backflush by Pack (16.15.6, pawobkfl.p)	Report with backflush/issue, receiving into stock at final operation into a serialized pack.	

**Table 1**

QAD Automation Solutions: Data Collection Transaction Package v2.2.0 (4 of 6)

Category / Banner	Task	Menu #	Transaction Name	.NET Menu Name (Menu #, Program)	Description	Exclusions and Limitations
Production	Production	5.3.8	Pack Receipt - Production Line	Trans: Pack Receipt by Production Line App: Pack Receipt By Production Line (18.22.7.2, pabkfl.p)	Report with backflush, receiving into stock at final operation into a serialized unit pack.	
Outbound	Outbound	7.1.1	SO Bulk Pick - Transfer	Trans: Transfer With Lot/Erial Change - SO Bulk Pick App: Inventory Transfer (3.4.3, iclotr03.p)	Directs user to pick and transfer materials from warehouse to a packaging staging area, where users will later pick and package per pre-shipper requirements.	
Outbound	Outbound	7.1.2	SO Pre-Shipper Create	Trans Pre-Shipper-Shipper Picking - Create Shipper App: Pre-Shipper/Shipper Picking (7.8.1, pasopi.p)	Scan LP and create Sales Order Pre-Shipper on demand.	
Outbound	Outbound	7.1.4	SO Pre-Shipper Pick	Trans: Pre-Shipper-Shipper Picking - Pick by LP App: Pre-Shipper/Shipper Picking (7.8.1, pasopi.p)	SO Pre-Shipper picking where inventory is License Plated and you pick it per pre-shipper requirements.	
Outbound	Outbound	7.1.7	Pre-Shipper Pack	Trans: Pre-Shipper-Shipper Pack Build-PARENT App: Calls linked transactions	Pre-Shipper picking for SO and DO where inventory is loose and you pick and package it per pre-shipper requirements.	
Outbound	Outbound	7.1.7-1	Linked	Trans: Pre-Shipper-Shipper Pack Build - DO App: Pre-Shipper/Shipper Pack Build (12.9.2, padopa.p) Linked Trans: Pack Transfer linked with prompt Linked Trans: LP Weight Modify linked with prompt Linked Trans: Transfer With Lot-Serial Change - Item Version	Called as linked transaction from parent transaction Pre-Shipper Pack Build - PARENT.	

**Table 1**  
QAD Automation Solutions: Data Collection Transaction Package v2.2.0 (5 of 6)

Category / Banner	Task	Menu #	Transaction Name	.NET Menu Name (Menu #, Program)	Description	Exclusions and Limitations
Outbound	Outbound	7.1.7-2	Linked	Trans: Pre-Shipper-Shipper Pack Build - Item - SO App: Pre-Shipper/Shipper Pack Build (7.8.2, pasopa.p) Linked Trans: Pack Transfer linked with prompt Linked Trans: LP Weight Modify linked with prompt Linked Trans: Transfer With Lot-Serial Change - Item Version	Called as linked transaction from parent transaction Pre-Shipper Pack Build - PARENT.	
Outbound	Outbound	7.1.10	Sub Shipper Container	Trans: Sub Container Maintenance App: Sub Container Maintenance (18.22.5.4, rectmt.p)	Create Containers (License Plate) for shipment.	
Outbound	Outbound	7.1.11	Sub Shipper Pick	Trans: Sub Shipper Maintenance App: Sub Shipper Maintenance (18.22.5.5 reshmt.p)	Create Shipper, associate containers (License Plate) to Shipper.	
Outbound	Outbound	7.1.12	SO Move Pack between Shipper	Trans: Move Pack Between Pre-Shippers - SO App: 7.8.12, pasoshmv.p	Move License Plates between SO (Pre)Shippers for same ship-to.	
Outbound	Outbound	7.1.13	DO Move Pack between Shipper	Trans: Move Pack Between Pre-Shippers - DO App: 12.9.12, padoshmv.p	Move License Plates between DO (Pre)Shippers for same ship-to.	
Outbound	Outbound	7.1.14	Pack Merge	Trans: Pack Merge App: 3.17.15 Papamg.p	Merges License Plates and Packs within a (Pre)Shipper.	
Outbound	Outbound	7.1.15	Shipper LP Weight Modify	Trans: Shipper Data Maintenance App: 7.8.6, patrkwt.p Linked Trans: License Plate Label Version	Modify weights of License Plates in (Pre)Shipper and reprint label.	

**Table 1**

QAD Automation Solutions: Data Collection Transaction Package v2.2.0 (6 of 6)

Category / Banner	Task	Menu #	Transaction Name	.NET Menu Name (Menu #, Program)	Description	Exclusions and Limitations
Outbound	Outbound	7.1.16	SO Pre-Shipper Convert to Shipper	Trans: Pre-Shipper-Shipper Print - SO App: PreShipper/Shipper Print (7.9.4, rcrp13.p) Linked Trans: Pre-Shipper Convert STD Linked Version - 2017.0001 Linked Trans: Shipper Move - Linked Version - 2017.0001	Convert SO Pre-Shipper to Shipper.	
Outbound	Outbound	7.1.17	DO Pre-Shipper Convert to Shipper	Trans: Pre-Shipper-Shipper Pack Build - DO App: DO Pre-Shipper Convert (12.19.11, dodsshpr.p)	Convert DO Pre-Shipper to Shipper.	
Outbound	Outbound	7.1.18	Truck Load	Trans: Truck Load App: Truck Load (7.8.4, patrkld.p)	Validate content loaded into truck matches Shipper.	
Outbound	Outbound	7.1.19	DO Shipper Confirm	Trans: DO Pre-Shipper-Shipper Confirm App: DO Pre-Shipper/Shipper Confirm (12.19.13, dodsois.p)	Confirm DO Shipper.	
Outbound	Outbound	7.1.20	Shipper Labels	Trans Shipper Labels App: NA	Print/Reprint all or specific label groups for a shipper or specific License Plate.	
Outbound	Outbound	7.1.21	Shipper Item Label	Trans: Customer Item Label App: NA	Print/Reprint shipper item labels.	
Outbound	Outbound	7.1.22	License Plate Label	Trans: License Plate Label App: NA	Print/Reprint License Plate labels.	

## EAM Transactions 2017.1EE

The following EAM transactions are included in the EAM 2017.1EE module:

**Table 2**  
EAM Transactions 2017.1EE (1 of 2)

Category / Banner	Task	Menu #	Transaction Name	.NET Menu Name (Menu #, Program)	Description	Exclusions and Limitations
EAM Inventory	Inventory Transfer	2.1.1.1	Relocate	Trans: Inventory Transfer App: Inventory browse: Action Relocate	Transfer an item between locations	
EAM Inventory	Inventory Transfer	2.1.1.20	Part Lookup	Trans: Inventory search App: Inventory browse: Find Field	Search for a part record	
EAM Inventory	Inventory Transfer	2.1.1.30	Part Labels		Print labels for an item that contains item information.	
EAM Inventory	Inventory Transfer	2.1.1.31	Location Labels		Print labels for an item that contains location information.	
EAM Inventory	Cycle Count	2.1.5.1	Adjust	Trans: Inventory Adjust App: Inventory browse: Inventory Action	Adjust on hand quantity for a part location	
EAM Inventory	Physical	2.1.7.1	Count Physical Inventory	Trans: Inventory Physical Inventory Count App: Inventory Physical Inventory	Record current count for a part and its location.	
EAM Inbound	Purchase	2.3.1.1	PO Receipt	Trans: Purchase Order Receive App: Purchase Order browse: Receive Action	Receive items against a purchase order.	
EAM Stores Requisitions	Stores Requisitions	2.1.1	Issue Stores Requisition	Trans: Stores Requisition List Issue App: Inventory - Stores Requisition: Issue Action	Issue part from a stores requisition list.	
EAM Stores Requisitions	Stores Requisitions	2.1.2	Close Stores Requisition	Trans: Stores Requisition List Change Status App: Inventory - Stores Requisition: Change Status Action	Change Stores Requisition status.	

**Table 2**  
EAM Transactions 2017.1EE (2 of 2)

<b>Category / Banner</b>	<b>Task</b>	<b>Menu #</b>	<b>Transaction Name</b>	<b>.NET Menu Name (Menu #, Program)</b>	<b>Description</b>	<b>Exclusions and Limitations</b>
EAM Stores Requisitions	Stores Requisitions	2.1.3	Part Look-up	Trans: Inventory lookup App: Inventory - Stores Requisition Second browse: New: Part Lookup	Look up a part to include on a Stores Requisition List.	
EAM Maintenance	Maintenance Reporting	2.5.1.1	Issue to WO	Trans: Inventory Issue App: Inventory Browse: Issue Action - enter work order number	Issue a part to a work order.	
EAM Maintenance	Maintenance Reporting	2.5.1.2	Issue to Equipment	Trans: Inventory Issue App: Inventory Browse: Issue Action - enter equipment number	Issue a part to a piece of equipment.	
EAM Maintenance	Maintenance Reporting	2.5.1.3	Issue to Project/Job	Trans: Inventory Issue App: Inventory Browse: Issue Action - enter project and job number	Issue a part to a Project/Job.	
EAM Maintenance	Maintenance Reporting	2.5.1.4	Issue to Account	Trans: Inventory Issue App: Inventory Browse: Issue Action - enter cc/acct/sub account number	Issue a part to a Cost Center/Account/Sub Account.	
EAM Maintenance	Maintenance Reporting	2.5.1.5	Return Material	Trans: Inventory Return App: Inventory Browse: Return Action	Return a part to Inventory.	
EAM Maintenance	Maintenance Reporting	2.5.1.7	Post Labor to WO	Trans: Work Order Post Labor App: Maintenance Work Order: Post Labor Action	Post labor against a work order.	
EAM Maintenance	Maintenance Reporting	2.5.1.8	Post Downtime to WO	Trans: Work Order Downtime App: Maintenance Work Order: Downtime Action	Enter downtime against a work order.	
EAM Maintenance	Maintenance Reporting	2.5.1.9	Record Failure/Repair on WO	Trans: Work Order Browse App: Maintenance Work Order Browse. Edit work order and enter Failure and Repair code.	Enter a failure and repair against a work order.	



