QAD West Coast
User Group

QAD REAL-WORLD USER GUIDE

As written by "non-techy" super users over 20 years of functional use of QAD
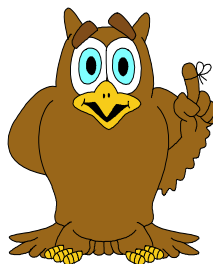
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Throughout this user guide the above symbol is displayed which provides helpful guidance within a business environment. These tips allow the user to understand not just the functional software application but how to apply it within standard business practices.

Points of interest:

QAD ERP is a fantastic product that is extremely stable, we have found, based on use of other ERP Systems that QAD is one of the more intuitive and easily adopted systems on the marketplace today. We (users) have worked on many different platforms however have always transitioned, whenever possible, back to QAD ERP for these reasons. Below are a few points we thought important to pass along to you, our WeCug members as items that should be considered in managing your QAD ERP relationship, we hope this adds value:

STAY CURRENT on maintenance.
Even if you don't intend on upgrading to the newest release and functionality, QAD offers tremendous support, as long as you remain current on Maintenance. Some of the benefits are listed below.

USE THE SOLUTIONS CENTER.

We have found that the QAD Solutions Center is a tremendous tool for users, database administrators as well as all that have a vested interest in using QAD to enable their function within their own company. Some key components of this Solutions Center: Knoweldgebase, submit new incident, document library, users and sites, and screen share for online live help.

> **The Knoweldgebase** is a forum that allows users to post issues/challenges relating to QAD and allows the users to read solutions observed throughout the years to these same issues. This tool alone can cut down, or sometimes eliminate additional expenses related to consulting services.

> Allows you to stay current on **product offering by QAD**, as well as provides access to free applications, e.g. metrics.

> **Learning Center** is a tremendous tool for all users of QAD. Become an administer to assign training to other users within your company. You can monitor their progress on assigned training, assign new hires training programs, etc. Users can also assign their own training within the Learning Center. This offering can greatly reduce your reliance on consulting, as well as new module implementations. The WeCug highly recommends taking full advantage of this rich offering!

> **Develop Super Users!** As mentioned above, you can also certify users within various modules, creating an in-house super user community. We recommend a robust super user develop program within each of WeCug's member companies. This allows you to reduce costs, but more importantly, foster the highest level of QAD adoption and ownership within your company. Without satisfied and competent users, you have an underutilized QAD, it's as simple as that!

> **Stay Connected**. And of course we'd be remis if we didn't say, become active in your WeCug, attend meetings, post on our Facebook page, ask questions of

our WeCug Board of Directors Members. You will be richly rewarded if you do, we promise!

General Navigation Tips

QAD's .Net application resembles the functionality of other Microsoft products. You can create custom folders (in Favorites), drag and drop screens into these custom folders as well as rename and delete screens from custom folders. If your user community is accustomed with MS products, they will be very comfortable with QAD's .Net User Interface.

While in the training and fit-to-business implementation sessions it is wise to remind the user community to create custom folders **_after_** they have working experience with QAD. If users begin to create custom folders at the beginning without understanding what their true workflow will be within QAD, it could add a certain level confusion. A custom screen example is illustrated below for reference.
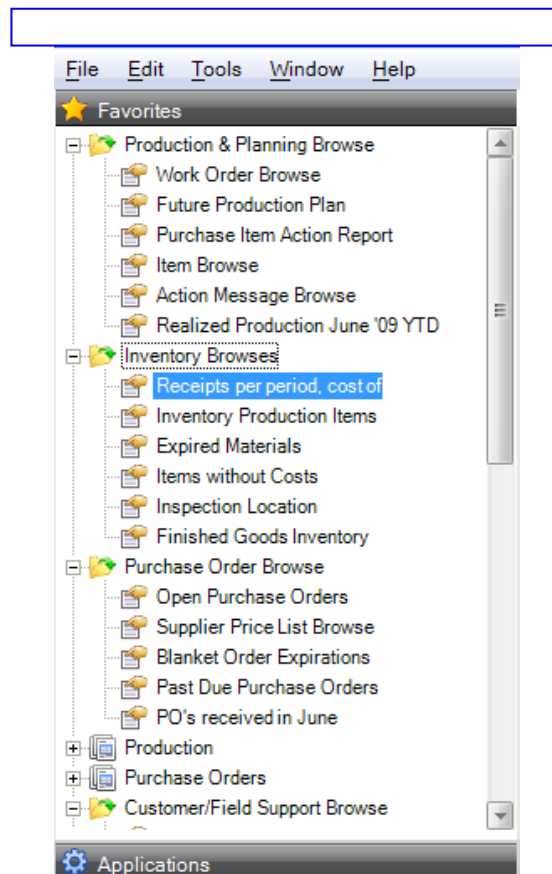
Keyboard Shortcuts

For users that are comfortable with using the keyboard to navigate compared to the mouse, they can use the below keyboard shortcuts to perform the same function as pointing and clicking with a mouse.

Keystroke	Command	Action
Ctrl+P	Print	Prints the current browse.
Ctrl+M	Menu Search	Activates Menu Search.
Ctrl+F6	Previous Workspace	Displays a selection list of active workspaces, listed from most recently to least recently used. The highlighted workspace in the list is the previous workspace so you can quickly select the workspace you were previously using. While holding the Ctrl key, press the Tab key or F6 key to step through the list from the most recently used to least recently used workspace. Release the Ctrl key to activate the selected workspace.
Ctrl+Shift+F6	Next Workspace	Displays a selection list of active workspaces, listed from most recently used to least recently used. The highlighted workspace in the list is the least recently used workspace. While holding the Ctrl key, press the Tab key or F6 key to step through the list from the least recently used to the most recently used workspace. Release the Ctrl key to activate the selected workspace.
Ctrl+Tab	Previous Window	Displays a list of windows with focus on the previously active window.
Ctrl+Shift+Tab	Next Window	Displays a list of windows with focus on the next window.
Alt	Access Menu Bar	Places focus on menu bar. Use the arrow keys to move through the menus.
Esc	Return From Menu Bar	Returns cursor focus to field that was in focus before Alt was pressed.
Ctrl+X	Cut	Places selected text on the clipboard and removes it from the current location.
Ctrl+C	Copy	Places selected text on the clipboard and leaves it where it is currently located.
Ctrl+V	Paste	Places the contents of the clipboard in the current cursor location.
F1	Help	Displays help for the currently running application.
F11	N/A	Toggle for full screen mode display.
Ctrl+F11	N/A	Moves program or browse from a tab in the Applications area and displays it in a new window back to a tab in the Applications area, enter Ctrl+F11 in the window.

Alt+F4	Exit	Exits the QAD .NET UI client application.
Up Arrow	N/A	When focus is on search results, moves to Menu Search.
Down Arrow	N/A	When focus is on menu search bar, moves to search results.

Generalized Code Maintenance

Description:

Generalized codes specify a list of values to be entered in a specific field. This list displays when a user requests a lookup. Values are validated depending on the characteristics of the field. Generalized codes are used for such items as Ship Via, Buyer codes (remember there are 3 separate buyer codes in QAD), Scrap Reason codes, etc. You can identify fields within QAD that will accept generalized codes by cntrl+f while in the target field, if the "validate against generalized code" (below illustration) category is checked, this field will allow you to enter and validate against generalized codes.

Validation only occurs when codes have been established within Generalized Code Maintenance. You can also create generalized codes for a field without validation, but the system does not validate user entry against this list.

Requirements:

- ➤ Access to Generalized Code Maintenance - 36.2.13.

- ➤ Field name and size (amount of characters accepted).

Instructions:

Enter the name of the field generalized code values apply to. Field name can be a database field name or a local variable defined in a Progress program.

Before entering a list of generalized codes for a field, you must know the field name and size. To find the name of a field in the character and Windows interfaces, position your cursor in that field and press Ctrl+F (page six screen print). Information about your current session and the active field, including generalized codes validation, displays in a pop-up window. In the Desktop interface, the field name displays as a field tip when you pass your cursor over the field.

You can also use Generalized Code Validation Report (36.2.15) to view a list of all fields in the database that have validations assigned.

Generalized codes need to be <u>controlled by a process</u>. Initially generalized codes should be developed within a team environment to ensure all possible opportunities are captured. For additions or subtractions to generalized codes develop a form that requires the original team's approval to ensure departmental procedures can be updated, as well as the necessary approval from the team which established the initial codes during the implementation.

Creating a Browse

Description: Browses are extremely powerful tools, based on the need you can customize and create whatever data set you'd like within QAD, as long as the data is currently being captured within QAD.

Requirements:

To create a new browse, user must have access to Browse Maintenance in QAD – 36.4.8.13.

1. Table joins – to define a join (connection) between two tables, drag & drop a field from one table to the field in the other table you want to join. More than one join can be defined if necessary. This is necessary to reference the tables

with like data. For example, if you are creating a inventory browse you should chose the <u>part number field</u> and join with the <u>part number field</u> in the new table, this creates the relationship between the two tables. It is always best practice to locate two fields that match, i.e. <u>part number</u> and <u>site</u>.

2. To modify a join property, right-click on the line and another window, Join Properties will open.
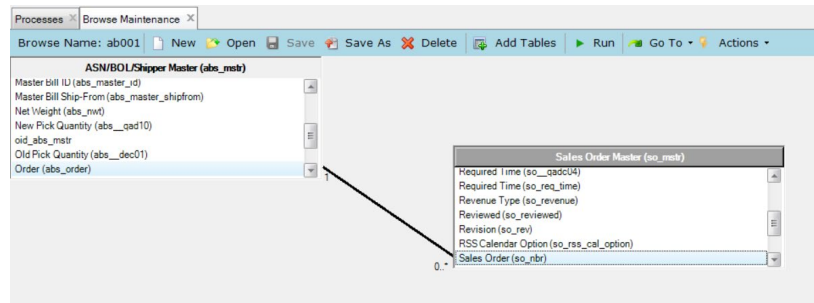
3. <u>Inner Join</u> - Only include records where the joined fields from both tables are equal.
   a. Example: in_part joined to pt_part.
4. <u>Outer Join</u> – Include ALL records from the left table and only those records from the right table where the fields are equal.
   a. Example: pt_part joined to pod_part since not all purchase order "parts" are for item master records.
5. <u>Add a field</u>: Locate fields in the tables, then drag-&-drop to add fields to the Query tab.
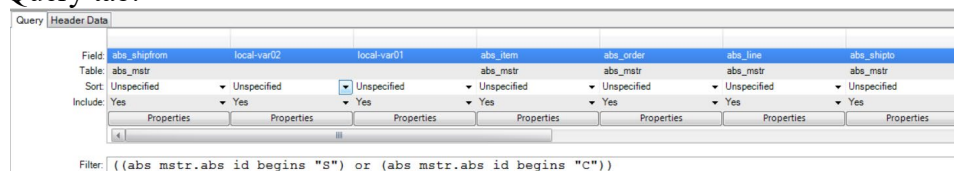
6. Delete a field: High-light the column, right-click, and select "clear".
7. Change the display order: Drag-&-drop fields into the desired order.
8. Field and Table - The field and table name from db schema.
9. Sort – Column is used to sort the browse results.
10. Show – Column is displayed when the browse is executed.
11. Filter Criteria – Up to 9 filters that are processed using a logical or operation for the filter in each row.
    a. Example: cm_type = "1000"
12. Select Properties button at the bottom of the column for that field in the Query grid.
13. Label Term (optional): Over-ride or assign a label to the column, this is the verbiage that will reflect in the browse.
14. Sort Order (optional): Specifies the sort order for the column as an integer from 1 – 8.
15. Browse Name - must start with two letters and end with three numbers (xx+999).
    a. <u>Best Practice</u> = use "xx" to name all custom or modified browses
16. <u>Description Term</u> – Label term for the browse. Format is an upper case alphanumeric string with no spaces. Create new Descriptions using Label Master Maintenance (36.4.17.1)

17. User IDs/ Groups – OPTIONAL: Specify a user or group ID to limit access to the browse.
18. After the browse has been created, saved, and tested, you will need to use Menu System Maintenance (36.4.4.1) to add to the menu.
19. When you save the browse definition, the system creates a .p file with the following format: Browse:2 letters + "br" + 3 numbers
20. Lookup: 2 letters + "lu" + 3 numbers

With initial set up of QAD's .Net, sit down with the user community and develop all possible additions to the browses and create them at one time. Users have the ability to create and customize their browses themselves, so they can omit fields that they do not need. Conversely it takes more time to change a browse, as well as security and validation to add once the database is turned over to a production environment. This function should also be controlled by a formal IT request and a governing procedure to ensure the data has been validated and users understand what data is available.

Modifying an Existing Browse

Description:

Modifying Browse follows the same principal as creating Browses as was just reviewed in the above section, ***however its easier***! For any operational browse in QAD you can modify as long as you have access to "design".

1. Locate the browse you'd like to modify by typing the Browse description in the Application window, right mouse click and click the "design" from the pull down menu, you'll see a screen similar to this screen displayed below.

2. You can then select which fields from the available tables to add to your browse by clicking on the appropriate field and drag and dropping into the frame below.
3. You can arrange these columns once you've added the appropriate field.
4. For additional tables simply click on "Add Tables" on the menu bar and ensure you join to like fields, i.e. Site, Item Number, etc. so the system knows what reference.

Moving Columns

Description:

Moving columns in a browse can be completed by any user, it does not matter on their individual security settings. Once you adjust or modify your browse you can save to favorites to retrieve the same view at a later time. This same functionality can be used for Filtering, Summing, and other user defined processes.

Filtering

Description:

Filtering browses can be accomplished two ways, one form the search section of the browse (see below), this is best practice for creating a browse that you will eventually save in your favorites. As the search criteria is easily visible.

Summing

Browse Link Maintenance

## Browse URL Maintenance

Description:

Browse URL Maintenance (36.4.8.9) enables a user to link a web address to data listed in a browse column. When the user clicks on the data, the split screen browser is activated and opens the specified web address.

Requirements:

User must have access to menu 36.4.8.9 in QAD.

Instructions:

Browse – Search for the browse in the QAD menu. Right click on the name and select "Properties". The browse name is listed in the "Aliases" section of the properties menu. The preceding numbers and the suffix ".p" should be omitted. See the blue highlighted section below.
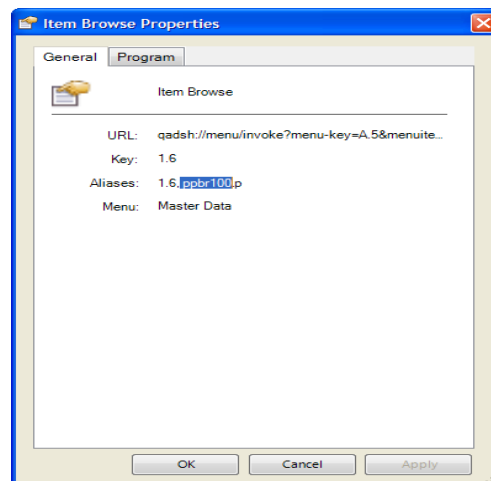
User ID – Enter a user ID to associate with the specified URL link. To associate all users in the system with this link, enter an asterisk (*) in this field.

Field Name – Designate the browse column in which you want to establish a URL link by entering the field name associated with that column. The field name can be found by opening the browse, right clicking on the column and selecting "Properties". Please see the example below. This field cannot be left blank.
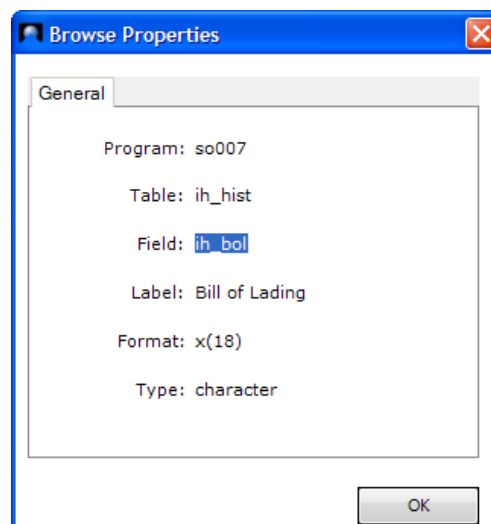
Value - Specifying a value in this field associates the designated URL with every browse cell that contains that value and belongs to the browse column indicated in Field. Enter an asterisk (*) to associate the URL with every cell in the column.

Description - Enter a descriptive label to associate with the specified URL.

Primary - Enter Yes to indicate that the specified URL is the primary URL for a cell. In browse data windows, right-clicking on a cell or column containing multiple URLs displays a list of all the URLs associated with that cell or column. The primary link displays at the top of the list and is the default link for the cell.
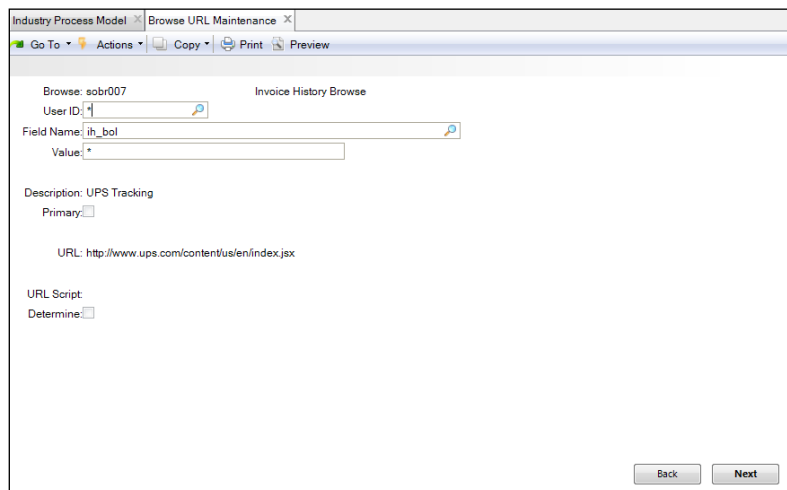
URL - Specify a URL referring to an Internet or intranet location. If you specify a URL, you cannot specify a URL script.

URL Script - To associate the specified user, browse, column, field value, or combination of these with a custom URL script, enter the full path to the directory containing the custom script. You cannot specify both a URL and a URL script.

Determine - Enter Yes to have the system run the specified custom URL script upon selection of the associated cell or column to determine whether that cell or column has an associated URL. When this field is No, the script is not run and the designated column or cell is defaulted to having a URL.

Example:

Please see below for an example of a URL linked to the BOL number listed in the invoice history browse. When the BOL number hyperlink is selected the user will be routed to the ups.com website.

<u>Simplify / Configure Screens</u>

Description:

When you configure screens, you create templates and assign them to user groups. Each template defines how fields display, whether they are required and enabled, if default values are supplied, and any automatic navigation from frame to frame.

Requirements*:*

User must be added to user group UIDesign in order to enable design capabilities (36.3.4).

Instructions:

To create a new template, select one of the supported programs in the menu system, such as Customer Maintenance. Right-click to display options and choose Design.

When you right-click on Customer Maintenance, you can select the Design option from the list.

Note. This option is enabled only when you are logged in as a member of the UI Design Group.

To move through the sequence of frames in a program, you must either create a new record or modify an existing one. However, when you are in configure mode, none of the changes that you make to database records are saved. You use the record simply as a way to move through the screen.

1. Search for the screen that is to be reconfigured and right click to select Design.

2. In the bottom left corner of the new screen click "New".

3. Name the template and add a description.
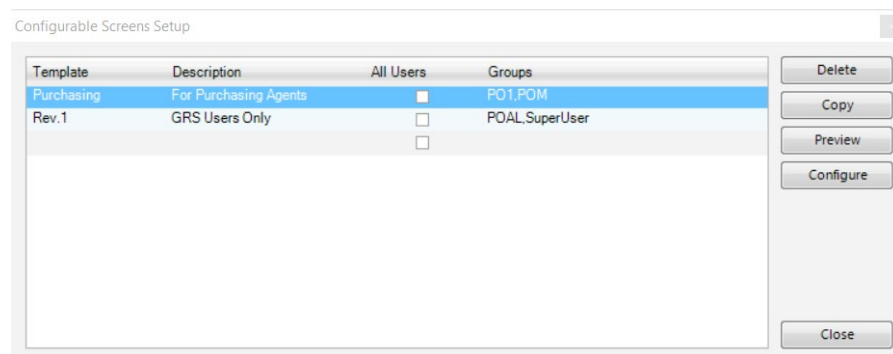
4. Select the .Net user group(s) that will use the reconfigured screen or click "Assign to All Users".

5. Click "Configure

6. Add a new record to begin the reconfiguration (Record will not be saved).

7. As you click into each open field you will have the option to reconfigure using the following options:

    a. **Default**
        i. True – Enter information as you would like for it to default automatically.
        ii. False – If information should not be automatically defaulted.
    b. **Disabled**
        i. True – Field is visible but user cannot modify the information.
        ii. False – Field is visible and can be modified as applicable.

        c. Hidden
- i. True – Field is not visible and cannot be modified (Note: Field will always be visible while in design mode).
- ii. False – Field is visible and can be modified as applicable.

        d. Required
- i. True – A value must be entered by the user.
- ii. False – Value is not required and may be left blank as applicable.

        e. Auto Navigate
- i. Next – Setting the option to next will automatically move the user to the next frame when exiting the selected field.
- ii. Back - Setting the option to back will automatically move the user to the previous frame when exiting the selected field.

        f. Add Frame
- i. Click "Add Frame" when your cursor is in the chosen location for the new frame.
- ii. In the "Add Fields" tab of the pop-up, select the field information that the new frame will contain.
- iii. Re-label the field names as necessary.
- iv. Drag and drop the fields into the frame entitled "Frame Designer".
- v. Click close

8. Before saving, click preview and navigate through the screen to view your reconfiguration.

In cases where new records are assigned sequential, it may be better not to create new records. Although the records are not saved, number sequences are incremented. For example, if you create a new sales order in configure mode, the new order is not saved. However, the next sales order number in Sales Order Control (7.1.24) is incremented, leaving a gap in sales order numbers, potentially raising questions on a finance or even regulatory audits.

Setting Field and Frame Properties

Use the options in the Properties tab to configure the behavior of the current field and frame:

Field Properties

Default. The value you specify in this field displays as a default value when the user is creating a new record in the associated program. Users can change the default value, unless the field is also disabled or hidden. In configurable mode, the default value displays in red type. Defaults you specify for a template override any other defaulting logic associated with a field. Defaults are only applied to new records; when a record is being edited, no field values are overridden.

Disabled. Users cannot update the field. In configurable mode, it is shown in gray.

Hidden. This field does not display to the user assigned this template. In configurable mode, it is shown with gray hash marks.

Required. Users cannot click Next through the current frame without supplying a value for this field. In configurable mode, the field is marked with a red asterisk (*). The field is also marked with a red asterisk when the user executes the program.

You can assign more than one option to a field; for example, you can provide a default value for a field as well as disabling or hiding it.

If you plan to mark fields as required, you should consider marking all fields that are validated by the application logic that way—not just additional ones that are required for your particular implementation. This will prevent users from being confused about why some fields without asterisks are also required.
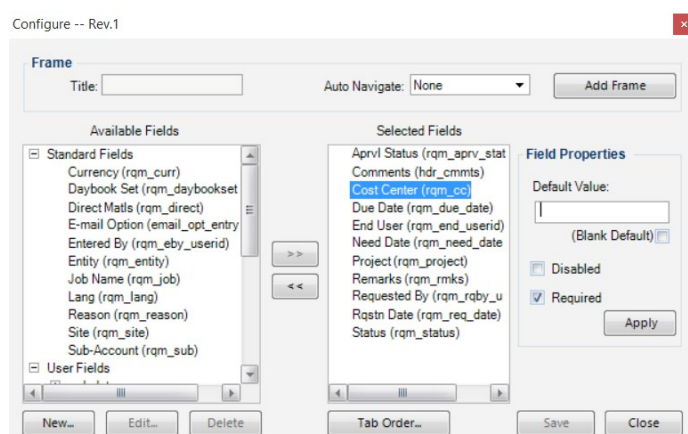
You can configure all types of fields in a frame except for fields that are represented with drop-down lists, such as the Line Format field in [Sales Order Maintenance (7.1.1)](). None of the field-level commands can be used with this type of field. When you right-click the Line Format field, the commands are disabled.

Frame Properties

Auto Navigate. Select from None (the default), Next, and Back. You can use the Next and Back options to simplify data entry by skipping entire frames. Use Next and Back only with careful planning. To skip an entire frame without generating an error, the proper defaults must exist for all required fields. Next and Back have the same effect; use them to skip the display of a frame. Which one you use depends on the normal screen navigation. To proceed from one frame to the next, you normally use the Next command. However, when you are in a frame that lets you enter multiple lines—such as sales order detail or customer banks—you use the Back command to indicate you are through entering lines and ready to display the next frame. So, for example, if you do not want a particular user group to modify bank accounts associated with customers or even see them, set the Back option on the Bank Accounts frame in Customer Maintenance. When users execute the program, that frame does not display. Typically, Next and Back prevent the display of a frame. However, in some cases, the

screen may be visible before the navigation reaches that point. For example, if you set Next on the bottom frame of the first screen in Customer Maintenance, the frame will still be visible when the screen is launched. When the user navigation reaches that frame, it will then be skipped.

You can click the Close button at any time to save your changes and leave configuration mode. Your changes are also saved each time you click Next or Back to access a new frame.

Adding Fields to Tables

If you are using the QAD .NET UI with QAD 2008 ERP 3, or above, you can add a user-defined field (UDF) to a table and then add the new field to the current screen.

In QAD 2008 ERP 2, you can add fields that already exist in tables to a screen, but you cannot add new fields to tables as you can if using QAD 2008 ERP 3.

To add fields to tables:

1. Open the Add Fields tab in the Configure window.
2. From the drop-down list, select the table to which you want to add a field.
3. Click New, enter a new field name, and click Save. The field is now added to the selected table.

You can remove fields you have added by clicking Delete. (You can only remove the fields you have added.)

Adding Fields to Screens

Use the options in the Add Fields tab to add fields to the current screen.

From the drop-down list, select the applicable table, and then drag-and-drop a field name from the displayed list to the location on the screen where you want the field to appear.

Name. Displays the field name.

Data Type. Displays the data type of the field.

Format. Displays the data format of the field.

Label: Specifies the field label as it is displayed on the screen. You can enter an appropriate label here or just use the default, which is the field name. Note that the system will translate the value you put in the Label field if the value is a label term. Otherwise, the system will just use the value for the label.

Validations. Choose *Generalized Codes* to have the value for the field validated based on as specified using Generalized Codes Maintenance (36.2.13). You can use Generalized Codes Validation Rpt (36.2.15) to view a list of database fields that have schema validation assigned. In the *Programs* field, you can enter the name of a

Progress program you have created that validates the field when it is on the screen. A template for creating such a program, `gpvalidate.p`, is available in the `QADInstallDir`/qadui/com/qad/shell/interface directory. You should make a copy of `gpvalidate.p` and name it appropriately. See the `gpvalidate.p` file for further instructions.

When you are done, click Save.

To remove a field you have added, when in configurable mode, place the cursor in the field, select the Properties tab, and click the Remove Field button.

Adding Frames

To add a frame after the current frame, in the Configure pop-up menu, click the Add Frame button located in the lower left corner of the menu.

Once you have added a frame, you can then add fields to it from the Add Fields tab in the Configure pop-up window.

To remove a frame you have added, when in configurable mode, click Next (or Back) to go to the frame, and then in the Configure pop-up window's Properties tab, click the Remove Frame button. (You can also remove fields by right-clicking on the field and selecting Remove.)

Adding a Program Link

Description:

Adding a program link allows the user to specify programs that can be run from other programs in the .NET User Interface. This makes it easier to run frequently used programs. When you click a link, the linked program opens in a new tab.

Requirements:

Access to both programs that will be linked.

Instructions:

User Id - Enter a user ID or leave the field blank to assign the link to all users.

Program - Enter the name of the program where you want the link to display. Leave Program blank to add the link to all programs that do not already have a user-specific record. Click Next to continue.

> **Note:** You may also use wildcards to specify where the links appear. Specifying pp* places the links in all programs beginning with pp.

Exec - Enter the program names (for example, sosopk.p) for the links to launch. To find the program name, right click on the item in the QAD menu and select "Properties". The program name is in the "Aliases" section. Please see below for an example:
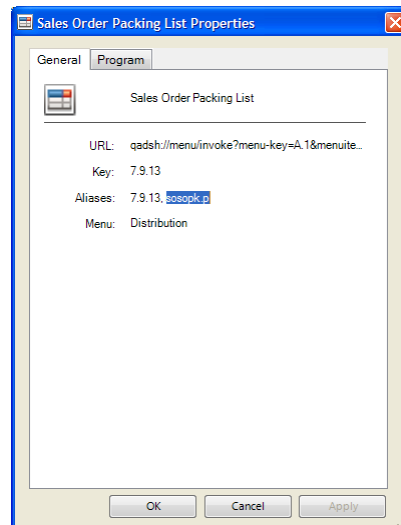
Label - Specify a text string to appear in the link area. If you leave this field blank, the standard menu description from Menu System Maintenance is used.

Image - Leave this field blank. Images do not apply in the .NET UI.

Example:

Please see below for an example linking Sales Order Maintenance (7.1.1 – sosomt.p) to Sales Order Packing Slip (7.9.13 – sosopk.p). In this example the link only applies to the user specified in the User ID field.
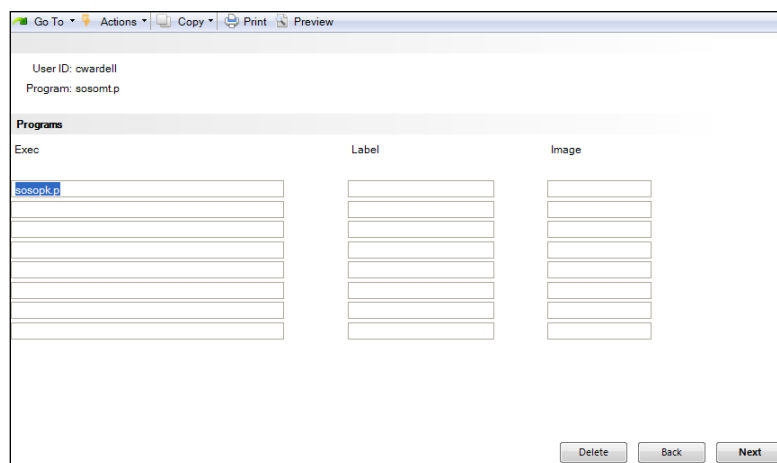
Description:

Inventory Status Code Management

Description:

If your QAD System is set up with Inventory Statuses of Y-N-Y, or Y-Y-Y, etc., **CHANGE THEM FAST!** Most QAD Systems are installed with this basic scheme as it comes from your consultant that is assisting with your QAD implementation. One proven method is to name the status codes based on the status of your inventory, this helps for Quality, Inventory Control as well as Financial purposes, some of these benefits are below:

1. Easy identification of the usefulness of inventory
2. Inventory reserve calculations and planning.
3. Restricted transactions to ensure "Scrap" inventory doesn't end up someplace where it shouldn't.
4. MRP netting logic
5. A common sense approach to the life Cycle of your inventory
6. Reporting/Browsing becomes easy.
7. If you are integrated into a separate quality system database, it becomes the standard of information sharing between QAD and your Quality System.

Set up of these codes is completed in Inventory Status Code Maint and you can follow the instructions related to this maintenance screen. White boarding your process and flow of materials is always a useful step in developing what codes fit your business, below is a simple start up guide to help you get off on the correct path:

Status Code	Available	Nettable	Overissue	Comments	Restricted Transactions
HOLD	No	No	No	Used to sequester all inventory.	Sales Orders, Work Orders, Transfers, etc.
KBN	Yes	Yes	No	Used for WIP Assemblies built only to stay in WIP	Sales Orders, RMA's, no ext. transactions
MRB	No	No	No	Items pending disposition after being inspected have been found to be discrepant materials	All Transactions with exception to ISS-CHL to change status
OBS	No	No	No	Obsolete Inventory	All Transactions with exception to ISS-UNP to issue out of inv.
QUAR	No	Yes	No	Incoming Materials awaiting inspection	All Transactions with exception of ISS-CHL to change status
REL	Yes	Yes	No	Released for use	Open
RTS	No	No	No	Return to Supplier	All Transactions with Exception of RCT-PO
RWK	No	No	No	Rework	All Transactions with exception of iss-wo for rework work orders

SCRAP	No	No	No	Scrap out of inventory	All Transactions with exception of ISS-UNP to scrap out of Inv.
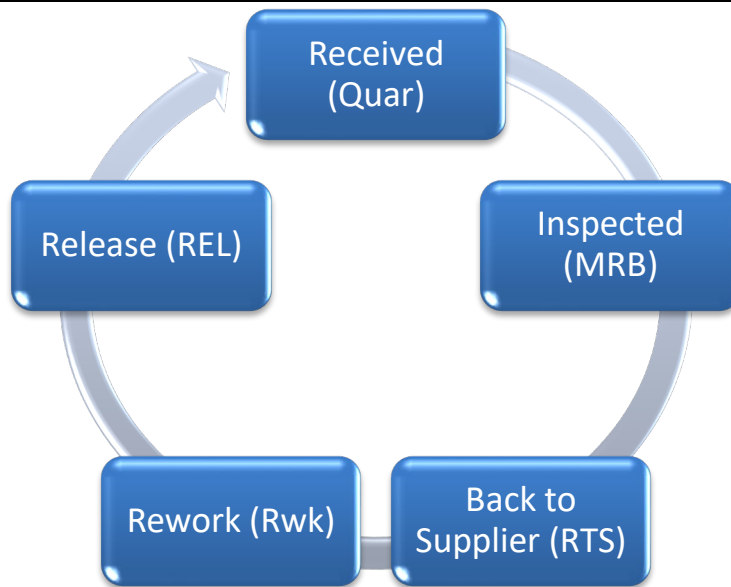
It is recommended you govern both the set up and management of these codes with a functional procedure, although your systems administrator can establish these codes it is critically important you consider the impact on all existing procedures prior to incorporating new codes.

Creating a Chart from a Browse

Description:

With the browse chart designer feature, you can quickly generate graphical representations of browse data. You can toggle between the standard browse display (called the grid view) and the new chart view. Using the chart view editor, you can select data in a browse and have it displayed as a pie chart or bar graph, for example.

Instructions:

To create charts from browses, start a browse and click on the Setup icon, then check Chart Designer.
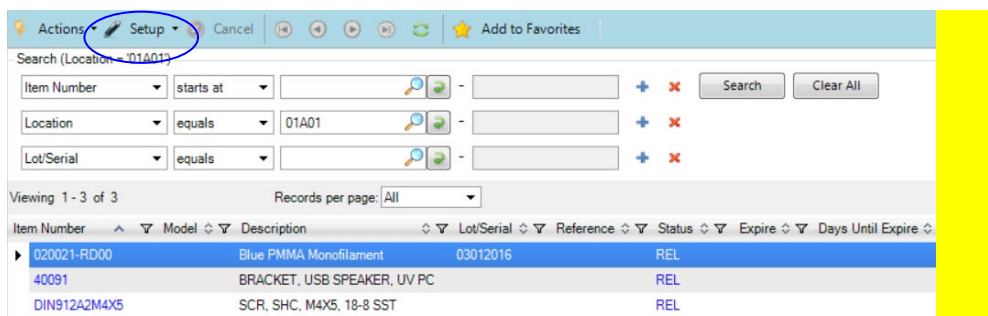
The Browse Chart Designer lets you choose settings that define a chart:

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

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

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

Y-Variables. Select the variables for the y-axis data from a pull-down menu listing the available columns in the browse. You can select up to five variables, depending on the type of chart you would like to use. For example, for a stacked bar chart you can select two or more variables.

Group By X Values. Select Yes if you want to display all the common x-axis data together in groups. Select No if you want to display the x-axis data individually. The x-axis data can be grouped in the following ways:

- *Count* displays the number of items in an x-axis group.
- *Sum* displays the sum of the values in an x-axis group.
- *Average* displays the average value in an x-axis group.
- *Minimum* displays the minimum value in an x-axis group.
- *Maximum* displays the maximum value in an x-axis group.
- *Chart Title*. Enter a title for the chart.

Chart Type. Select from among the following types of charts:

- Column Chart
- Column Chart 3D
- Bar Chart
- Bar Chart 3D
- Pie Chart
- Pie Chart 3D
- Stacked Column Chart
- Stacked Column Chart 3D
- Stacked Bar Chart
- Stacked Bar Chart 3D

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

2.   Click Apply to view the chart.

Tip. For stacked bar and column charts, the data values must be all positive or all negative.

Tip. For stacked 3D bar and column charts, you must have at least one row and one numeric column, and the data values must be all positive or all negative.

You can toggle between the chart view and the grid view of the browse by clicking on the Show Grid View or the Show Chart View icons. If you are in chart view, the Show Grid View icon is displayed, and if you are in grid view, the Show Chart View icon is displayed.

While in chart view, you can do the following:

- Rotate and Zoom 3D Charts. You can rotate 3D charts by pressing the Alt key and moving the mouse. Similarly, you can zoom 3D charts by pressing the Alt key and moving the mouse's scroll wheel.
- Search Charts. The QAD .NET UI's browse search capabilities apply to the chart view as well as the grid view. By using the search capabilities you can interactively change the chart view of the browse.
- Hide Titles and Legends. Chart titles and legends are shown by default. You can hide (or show) titles by right-clicking and selecting Hide Titles (or Show Titles). Similarly, you can hide (or show) the legend by right-clicking and selecting Hide Legend (or Show Legend).
- Launch Chart in New Window. To launch a chart in a new window, right-click on the chart and select Launch in New Window.
- Copy Chart to Clipboard. You can copy the chart to the clipboard so you can paste it in other applications. To copy the chart to the clipboard, right-click in the chart area and select Copy to Clipboard.
- Edit Chart Design. To return to the chart editor, click the Edit Chart Design icon.
- Interactive Charting. For any item in the chart that has a drill-down, you can have a split-screen view of both the chart and the drill-down browse, which can also be displayed as a chart. When you click on an item in the first chart, the drill-down chart will automatically change to reflect the changed data for the drill-down. Clicking on an item in the chart also selects the associated row in the browse. Conversely, clicking on a row in a browse also selects the associated item in the chart.
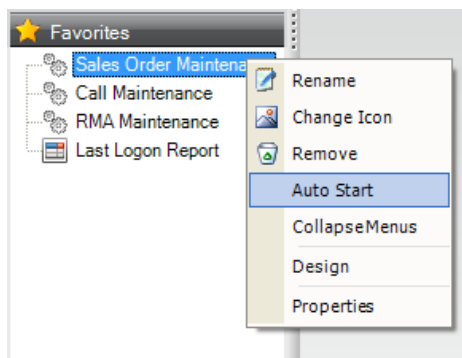
Auto Start Function

Description:

You can automatically start any favorite menu item when you log in to QAD.

Instructions:

For any menu item saved under Favorites, right click the item and select Auto Start.

With Auto Start selected, the menu item starts automatically when you next log in. Favorite menu items that start automatically are displayed in bold. With the exception of process maps, you can have more than one menu item start automatically. To disable this feature, right-click the item and deselect Auto Start.

Only one process map should have Auto Start selected. Having multiple process maps with Auto Start selected will launch the Process tab but the display will be blank. If you have multiple process maps in only one folder under Favorites, you can select Auto Start for multiple process maps in that folder, but only the first process map with Auto Start selected in that folder will open. If in that folder you include a sub-folder with one or more process maps set to Auto Start, the Process tab display will be blank.

Customizing Favorites

Description:

The Favorites pane is a custom menu you can create using menu options or drag-and-drop techniques.

Starting with the QAD .NET UI 2.7, favorites are stored on the server rather than on client computers. Because favorites are now stored on the server-side, when you log on to the system from a different computer than your usual client computer, you will still see your favorites. Additionally, having your favorites on the server makes them immune to any disk problems that might occur on your client computer.

Instructions:

Adding Favorites

You can add favorites in the following ways:

- Right-click a menu folder or menu item in the Applications pane and choose the Add to Favorites option. The menu appears at the bottom of the list in the Favorites pane.

- Select the menu folder or item you want and drag it from the Applications pane to the Favorites pane.

- Drag-and-drop URLs from Internet Explorer to the Favorites pane, where the link will be saved as a favorite.

- Drag-and-drop an item from the file system (for example, from Windows Explorer) to the Favorites pane, where a link to the item will be saved as a favorite. You can drag-and-drop programs (executables) as well.

Organizing Favorites

You can organize your favorites into folders and subfolders, rename menu items and folders, rearrange the order of folders and items, and remove menu items you no longer want.

To organize menus into a hierarchy, right-click in the menu space and choose Create New Folder. You can then drag the folder to any position and drag menu items or other folders into it.

To rename or remove a menu item, right-click the item and choose the option you want. You can also display properties and go into design mode for enabled programs.

To change the icon of a menu item, right-click the item and choose Change Icon. Browse to a graphics file and select it.

To collapse the display of all open folders, right-click any item and choose Collapse Menus.

When you right-click a folder, you can also create a new subfolder within the currently selected folder.

You can launch a group of menu items organized under a folder together. Right-click on the folder and select Menu Collection. The folder icon changes to a collection icon. Click on the icon to launch all the functions at the same time.

Defining Menu Collections

Instructions:

You can define collections of menu items such as programs, browses, process maps, and dashboards using Menu Collection Maintenance. You can place menu collections in any folder in the Applications pane. The default location for menu collections is the Menu Collections folder.

 Note. Menu Collection Maintenance is only available if you have access to the Administration menu.

Instructions:

To define a menu collection:

- Choose Administration | Menu Collection Maintenance.

- In the Name field, enter a name for the menu collection.
- In the Location field, if you want to place the menu collection in a particular menu, drag-and-drop a menu folder from the Applications pane to the Location field. If you leave the field blank, the new menu collection is placed in the Menu Collections folder (In Collections).
- In the Items box, drag-and-drop one or more menu items from the Applications pane to the Items box. These are the items that will be in the menu collection.
- Click Save.

To edit a menu collection:

- Right-click on the menu collection and choose Edit, or choose Administration | Menu Collection Maintenance.
- In the Name field, use the drop-down menu to select the name of the menu collection you want to edit.
- To change the placement of the menu collection, drag-and-drop a menu folder from the Applications pane to the Location field.
- The menu collection now moves from its current location to the menu folder you drag-and-drop to the Location field.
- To change the order of a menu item in the collection's Items box, click on a menu item in Items and use the up and down arrow buttons located next to the box.
- To delete a menu item from the collection, in the Item box, click on a menu item and press the Delete key on your keyboard.
- Click Save.

To delete a menu collection:

- Right-click on the menu collection and choose Delete.

Alternatively:

- Choose Administration / Menu Collection Maintenance.
- In the Name field, use the drop-down menu to select the name of the menu collection you want to delete.
- Click the Delete icon.

Creating Browse Collections

Description:

To help you browse and maintain related item, site, sales, location, and customer data, you can define collections of related browse and maintenance programs using Browse Collection Maintenance.

In a browse collection, a main browse drives the fields selected in the other browses and programs. QAD displays the other browses and programs in the lower part of a horizontal split-screen, with the main browse located in the upper part. In a browse

collection, a main browse drives the fields selected in the other browses and programs. The QAD .NET UI displays the other browses and programs in the lower part of a horizontal split-screen, with the main browse located in the upper part. For example, you could define a browse collection called Sales that includes a Sales Order browse, Customer browse, and Sales Order Maintenance program.

If you click on a record in Sales Order, the associated browses and Sales Order Maintenance program automatically have the data for that order entered. You can just click on the Customer tab to see the information on the customer for that order, or click on the Sales Order Maintenance tab to see the sales order.
Using the Browse Collection Maintenance, you can define your own browse collections that you can then save under Favorites.

Requirements:

Browse Collection Maintenance is only available if you have access to the Administration menu.

Instructions:

To define browse collections:

1. Select Administration / Browse Collection Maintenance.

2. To start a new collection, click the New button. (To edit an existing program group, click Load.)

3. In the Name field, enter a name for the browse collection.
   - You can specify a label term as a name for the browse collection. The advantage of doing this is that you can use a label term whose associated description has been translated into a supported language. To find an existing label term, open Label Master Browse (36.4.17.2). To quickly find a label term you might want to use, use the browse's Search function. For example, if you want to find a label term that includes Item, set the Search fields to Term contains Item and click Search. In the browse, the Term column lists the label terms that include Item and the Long Label column displays the associated descriptions. Next, in Browse Collection Maintenance's Name field, enter the label term in the format ${Term}. For example, if the label term is ALL_ITEMS, enter ${ALL_ITEMS} in the Name field. After the browse collection is saved, in the Applications Pane, the browse collection name takes the description associated with the ALL_ITEMS label term. If the ${Term} name is not converted immediately to the label term's description, log out and log back in again to refresh the Application Pane's display.

4. In the Location field, if you want to place the browse collection in a particular menu, drag-and-drop a menu folder from the Applications pane to the

Location field. If you leave the field blank, the new menu collection is placed in the Browse Collections folder (In Collections).

5. Drag-and-drop the browse you want to use as the parent browse from the Application pane to the gray area in the Browse Collection Maintenance screen.

6. For example, drag Sales Order Browse from the Applications pane to the grey area in Browse Collections Maintenance. Sales Order Browse is now the parent browse in the browse collection.
   - Note: The parent browse must contain some data or you will not be able to add child browses and create a browse collection.

7. Next, you add child browses to the parent browse. You can either drag-and-drop browses from the Applications Pane or click the Add Browse button.
   - For example, you can drag-and-drop Customer Address Browse from the Applications pane.

8. In the gray area, click on the name of the browse you have just added as a child browse. For example, click on Customer Address Browse as displayed in the gray area under Sales Order Browse.

9. Next, use the table with the Target Field and Source Field columns to specify the relationship between the parent browse and the child browse.

10. The Target Field column includes the fields that can be driven by whatever source fields you want to select.

11. To select a source field, go to the appropriate source field cell and select a field from the pull-down menu, which lists all the available fields from the browse you first selected. Note that programs allow only one field to be the target. For example, for Customer Address Browse, the Target Field can be Customer and the corresponding Source Field can be Sold-To.

12. Now the data displayed in the child browse will be driven by the current row in the parent browse.

13. You can also drive URLs from browses. For example, select Customer Address Browse and click the Web Browser button.

14. In the Title field, enter Google Address Search. In the URL field, enter http://maps.google.com/maps?q= and then choose Postal Code from the pull-down menu, which adds <Postal Code> to the Google Maps query. Now Customer Address Browse automatically drives a Google Maps query.

15. If you decide you want to remove one of the browses or programs, select the browse or program and click the Delete button just above the gray area.

16. To preview the collection, click Preview.

17. To save the program group as a favorite, click Save. The system prompts you to name the browse collection. The browse collection definition is saved as an XML file on your local machine where you are running the QAD .NET UI.

(end)