QAD Enterprise Applications
Standard & Enterprise Edition

Training Guide

QAD .NET UI Administration

70-3063B
QAD 2011 Standard & Enterprise Edition
March 2011

NETUIAdmin_TG_v2011SE_EE.pdf/mjm/dmk

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

Contents

About This Course

Course Description

This course provides a technical and functional overview of the architecture and use of QAD's .NET UI Application Shell.

The course includes information on:

- The architecture of QAD's interface tools
- Deployment options for the QAD .NET UI
- Administration of the QAD .NET UI
- Tuning and troubleshooting the installation
- Navigation, browses, and process maps.

Objective

Learn how to administer and troubleshoot both the Enterprise (EE) and Standard (SE) editions of QAD Enterprise Applications. In addition, students will be able to use browses and process maps effectively.

Audience

- Implementation consultants
- System administrators

Prerequisites

- Progress 4GL knowledge
- Data model basics
- Knowledge of QAD Application architecture concepts
- Familiarity with Enterprise (EE) and Standard (SE) editions of QAD Enterprise Applications

Course Credit and Scheduling

This course is designed to be taught in three days.

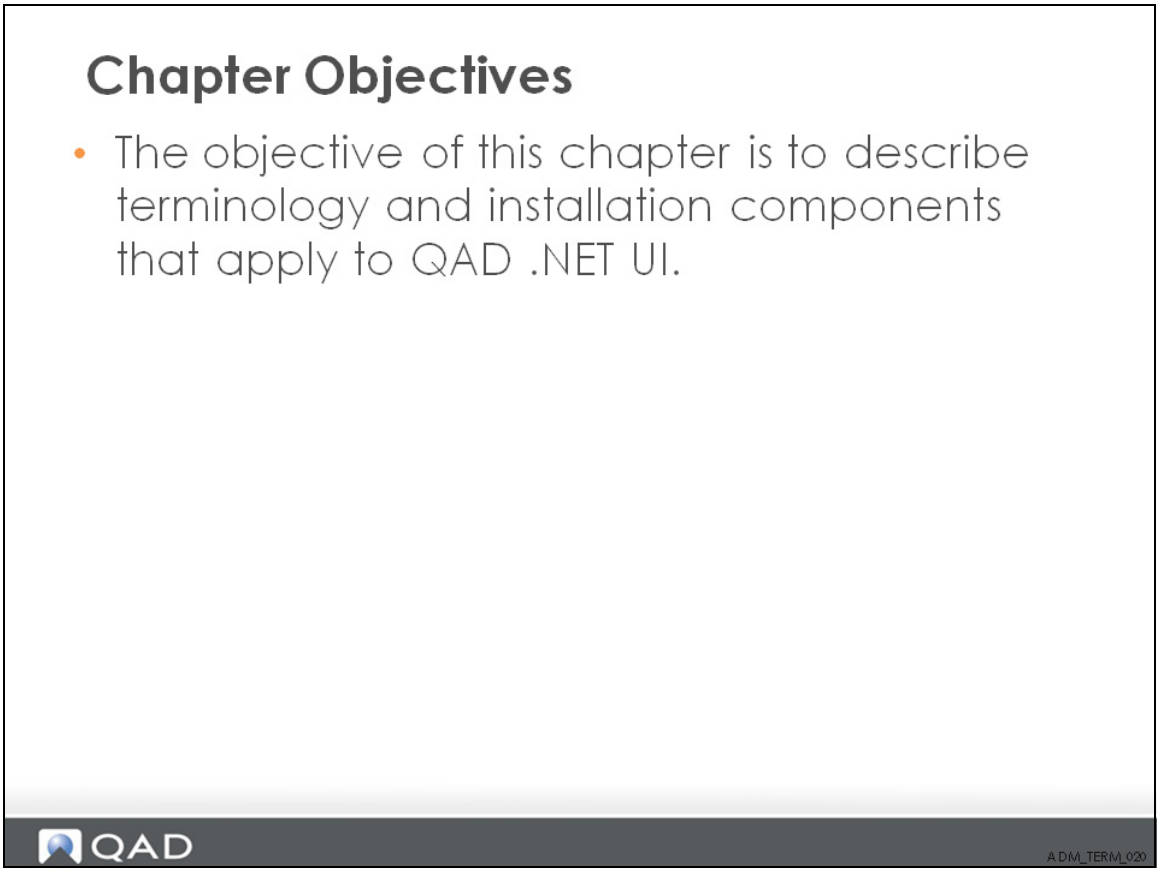
Virtual Environment Information

The hands-on exercises in this book can be used with the "Standard Edition r01 - Training" environment, in the "Training" workspace.

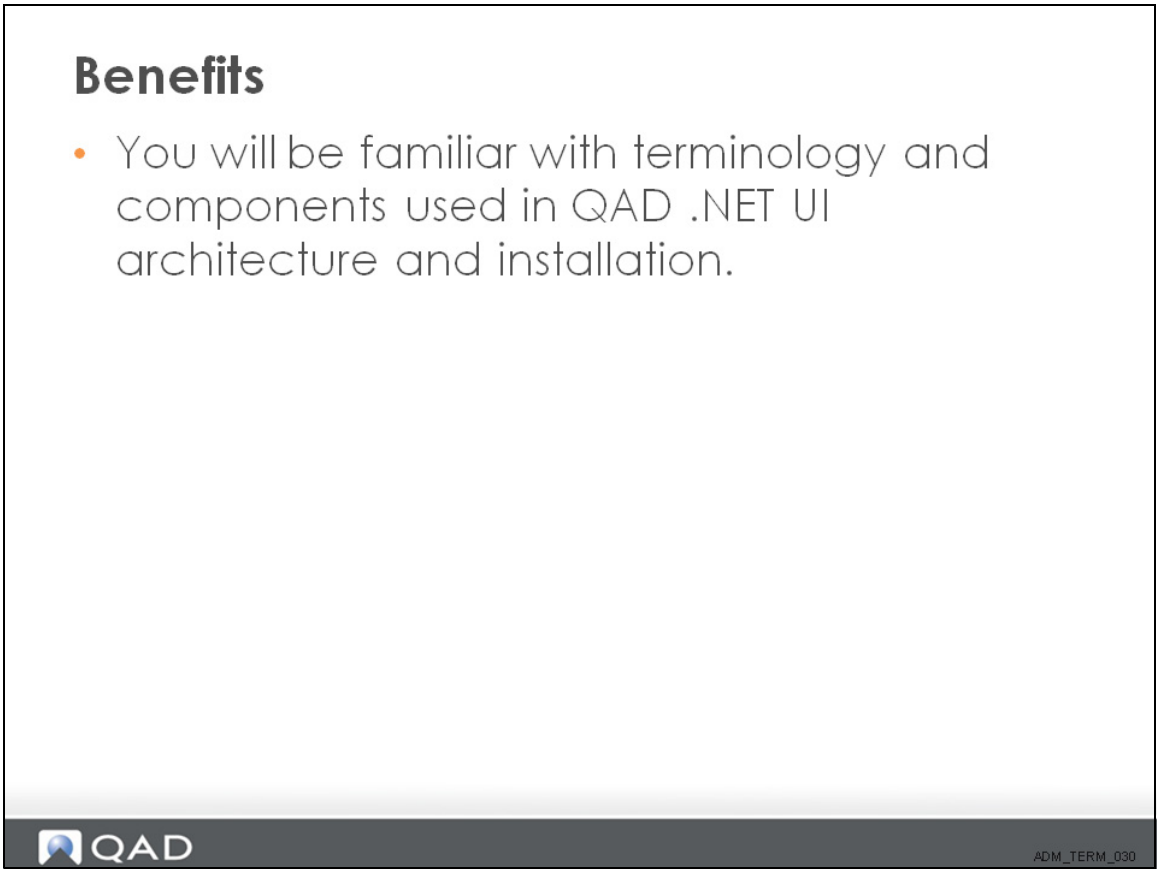
Chapter 1

Terminology and Components

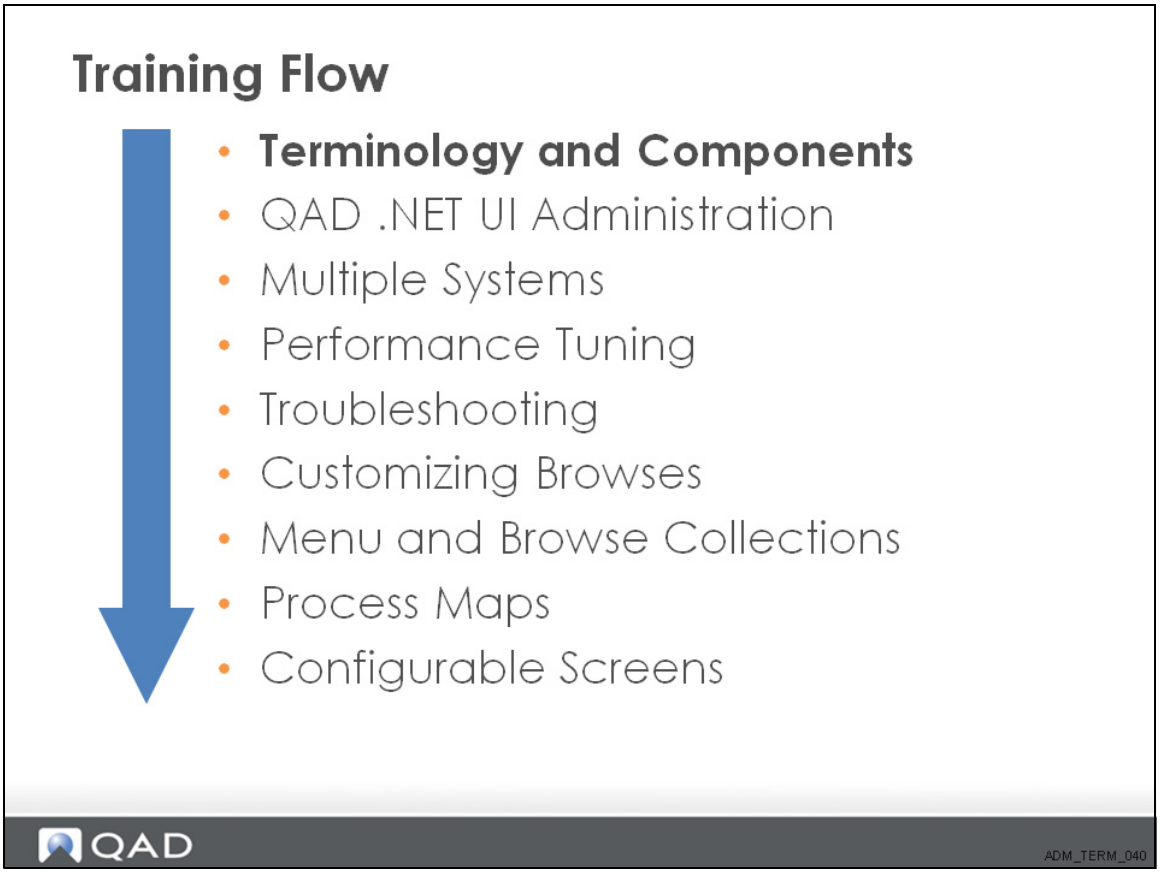
Chapter Objectives



Benefits


Benefits
• You will be familiar with terminology and components used in QAD .NET UI architecture and installation.
QAD
ADM_TERM_030

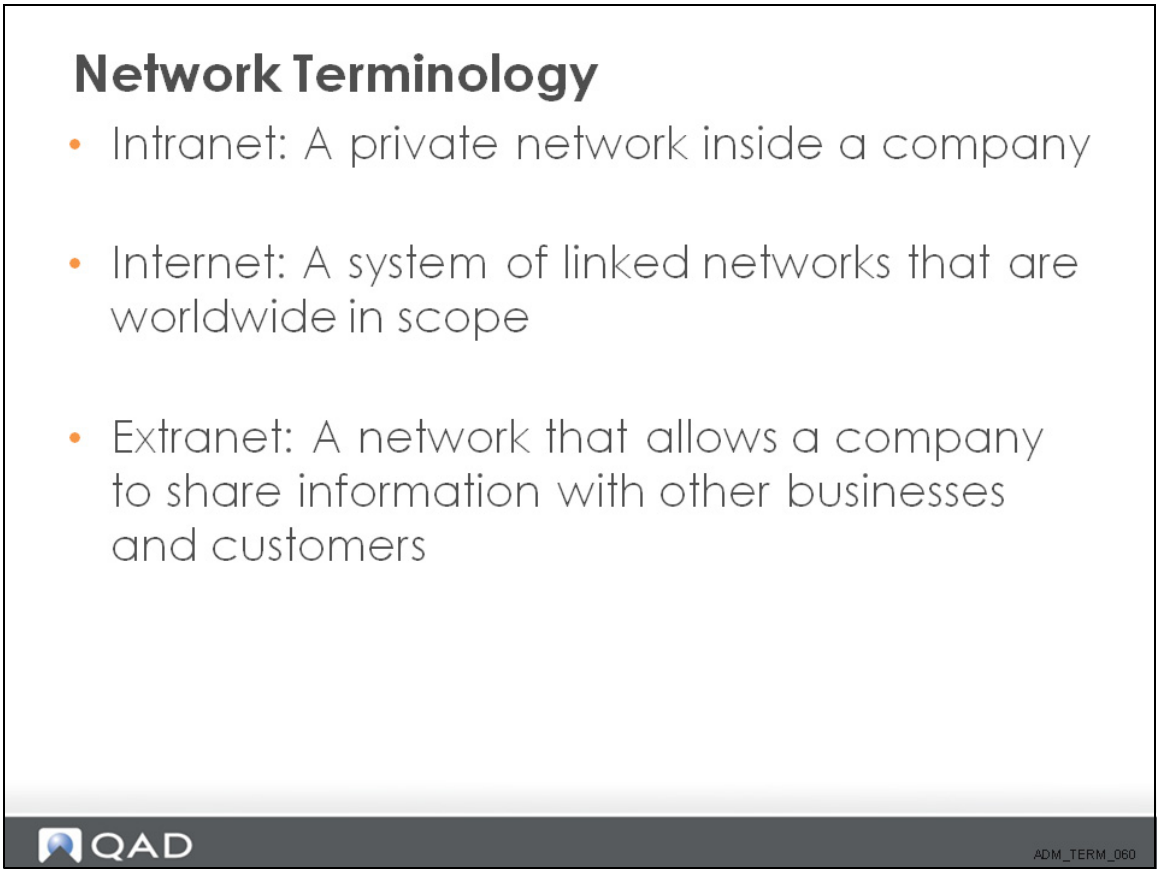
Training Flow

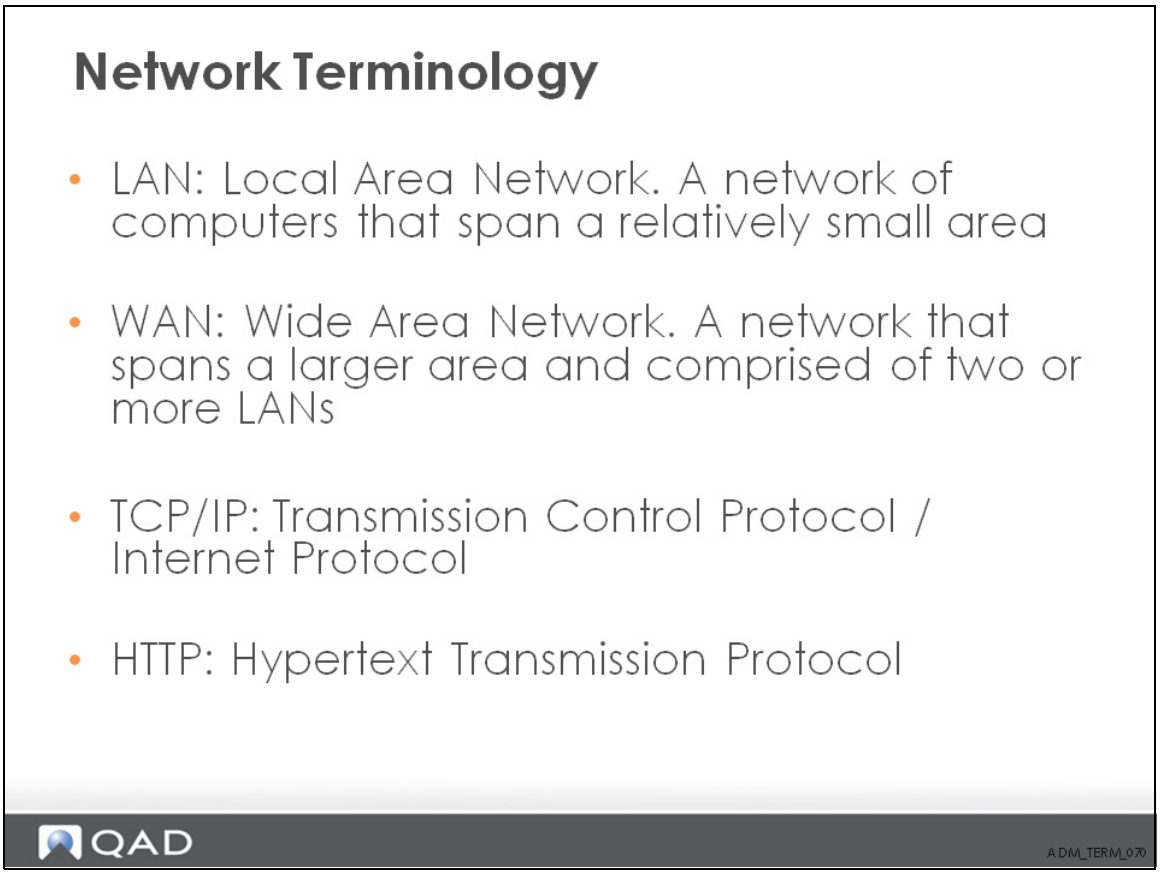


Overview

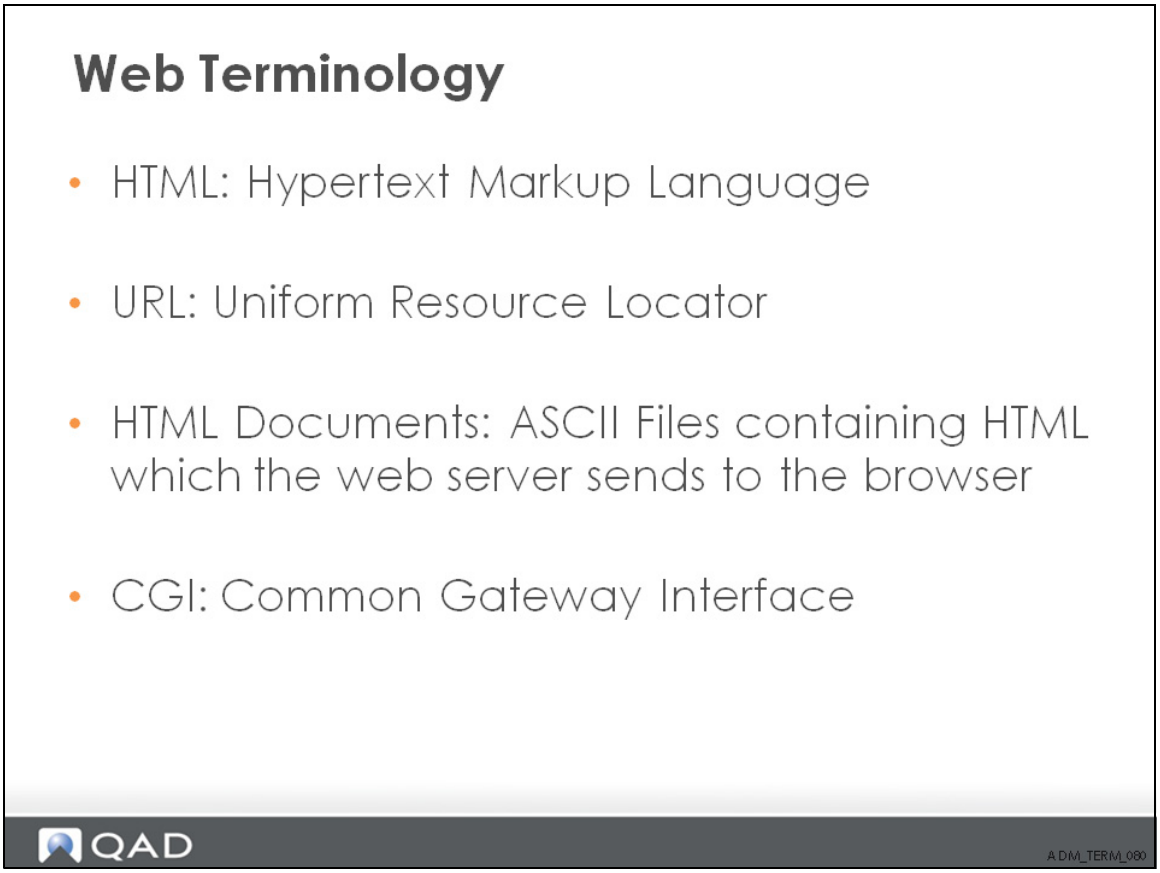

Overview
Network Terminology
Web Terminology
Java Terminology
.NET Terminology
QAD
ADM_TERM_050

Network Terminology

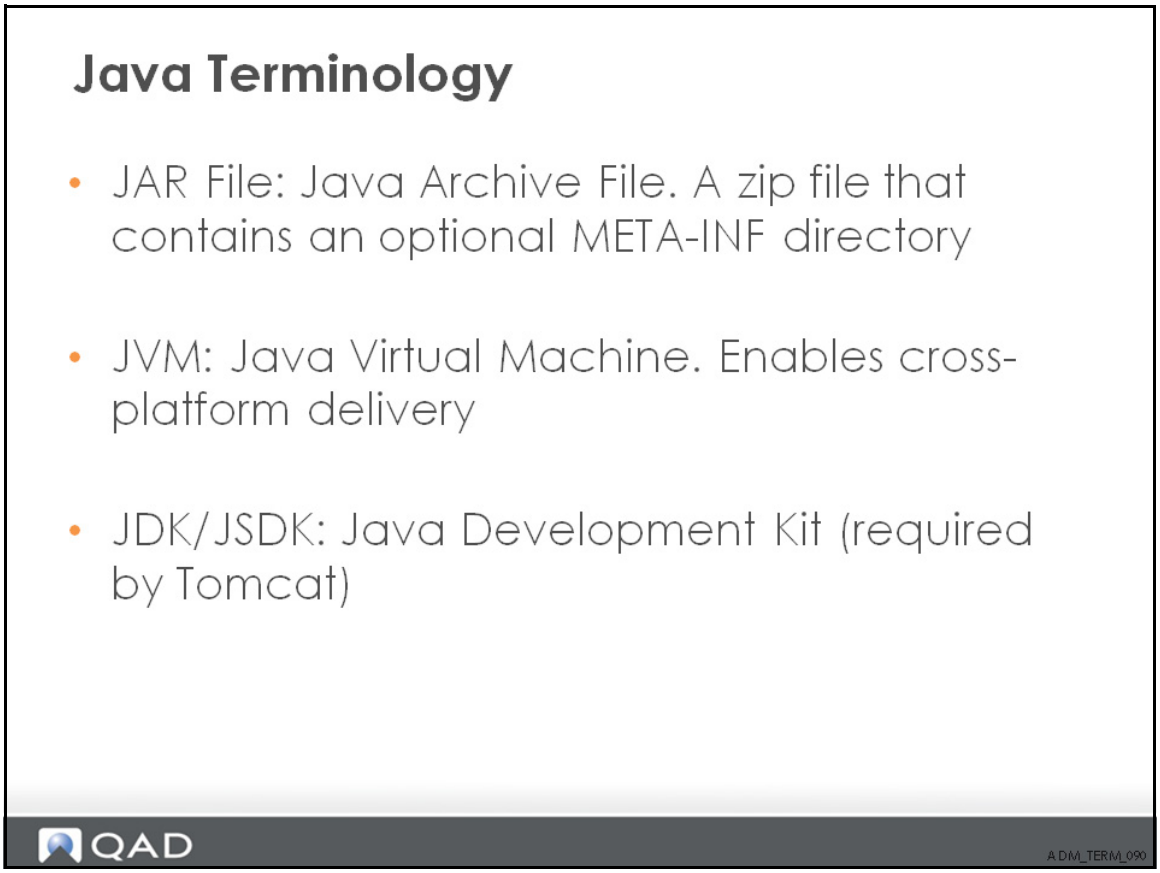



Network Terminology
• LAN: Local Area Network. A network of computers that span a relatively small area
• WAN: Wide Area Network. A network that spans a larger area and comprised of two or more LANs
• TCP/IP: Transmission Control Protocol / Internet Protocol
• HTTP: Hypertext Transmission Protocol
QAD
ADM_TERM_070

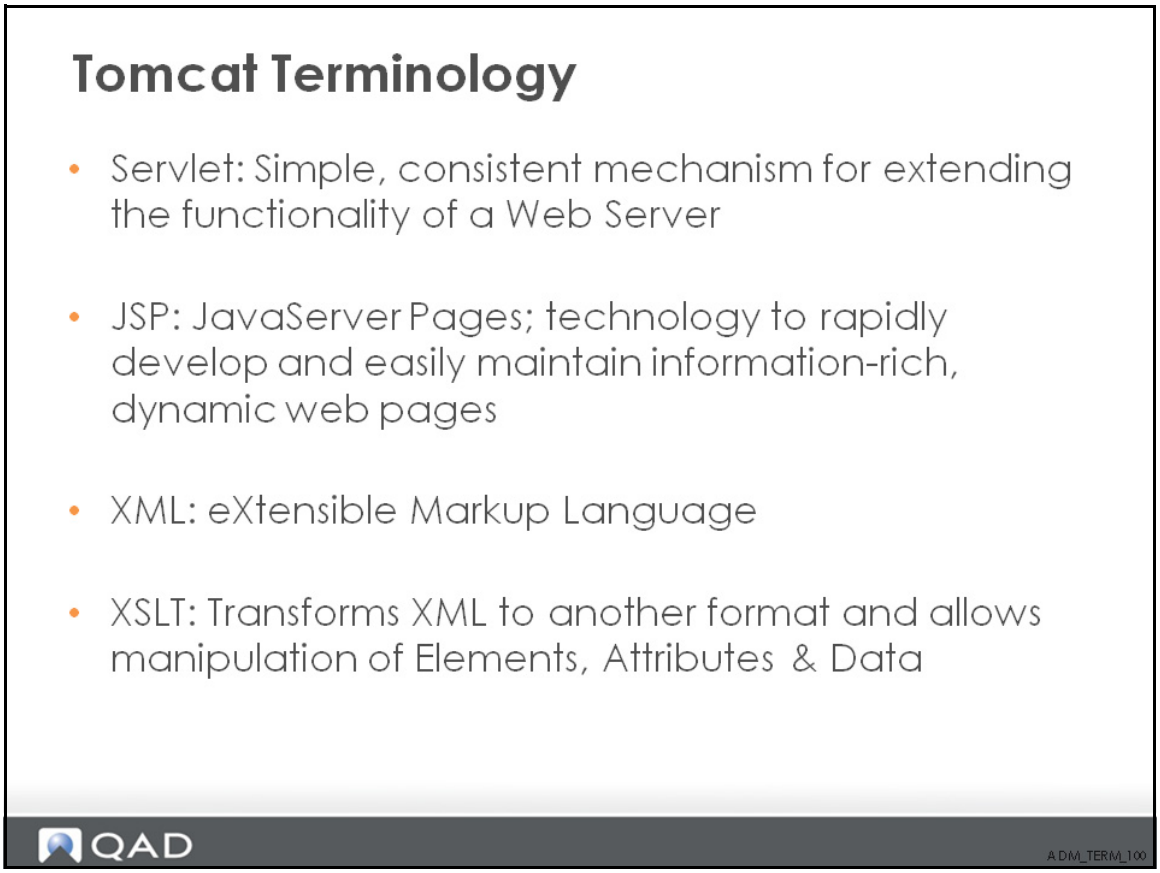
Web Terminology



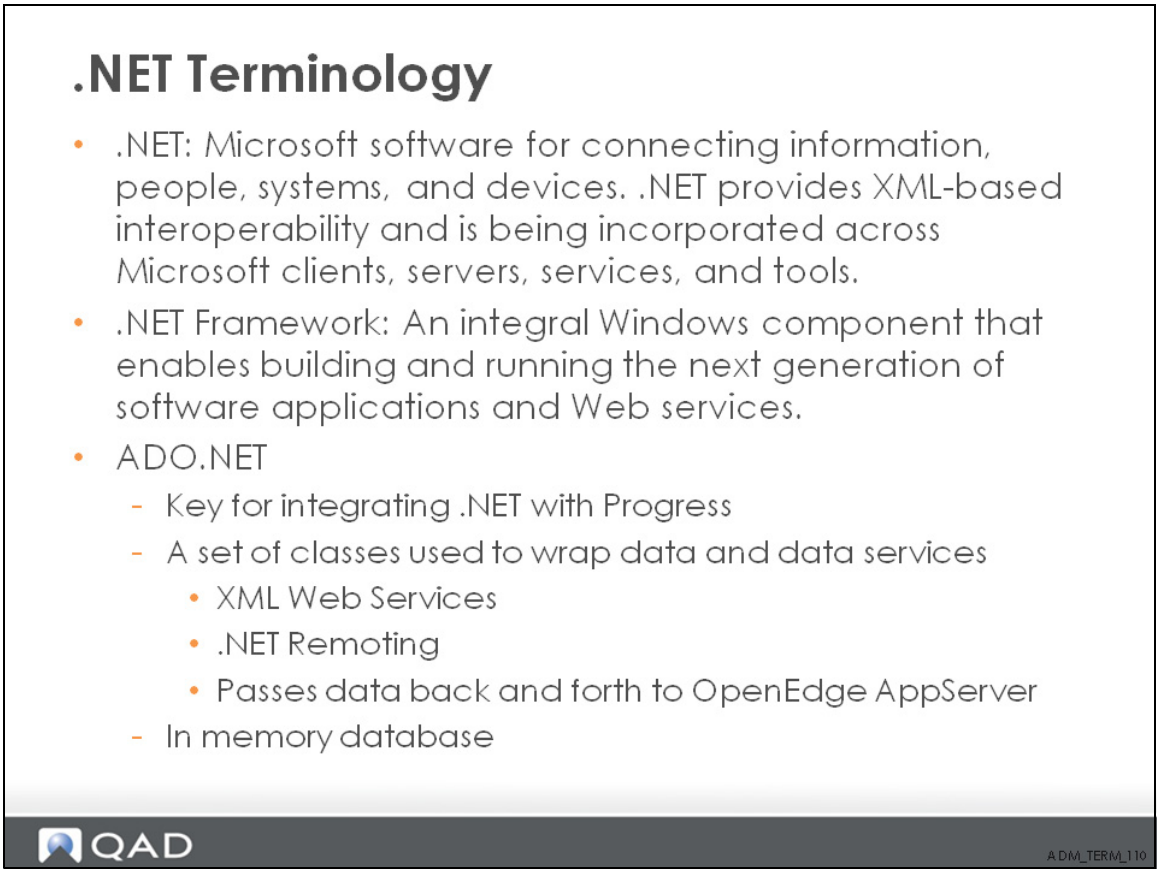
JAVA Terminology

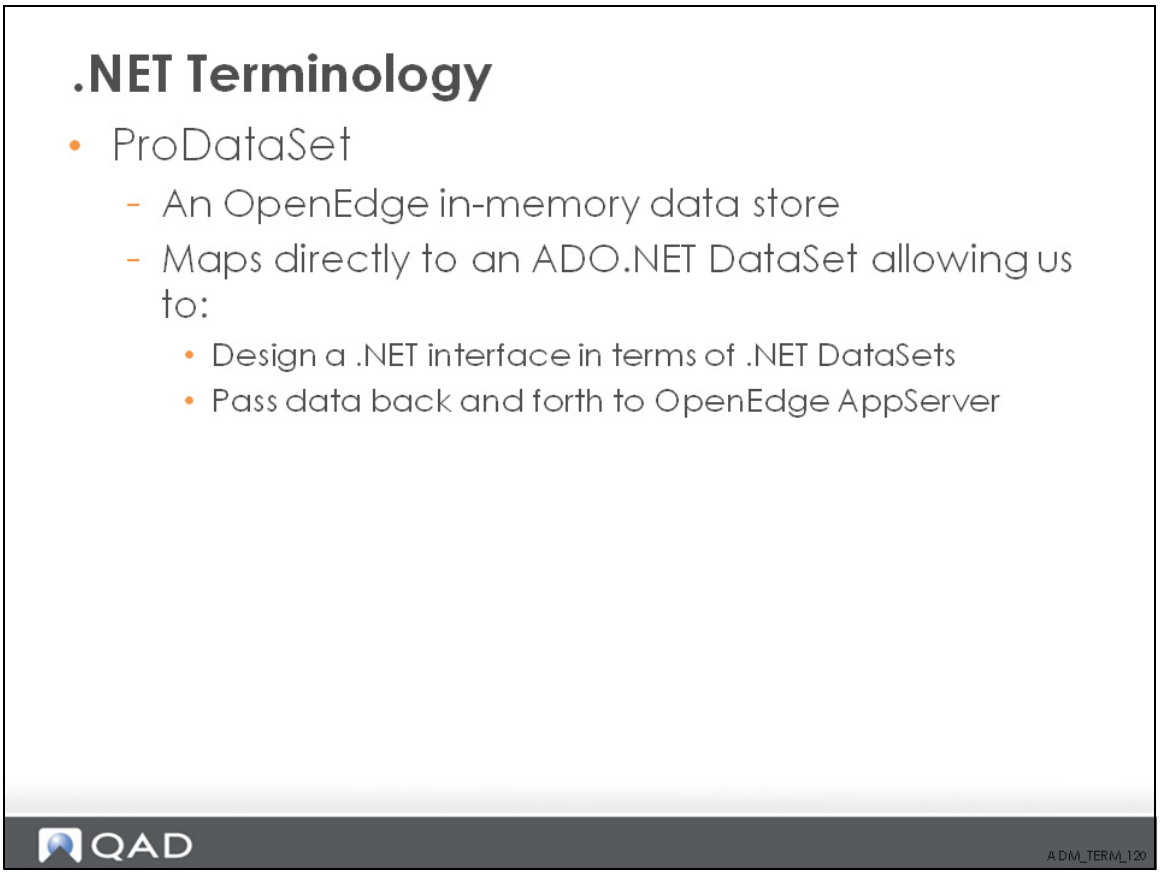


Tomcat Terminology



.NET Terminology

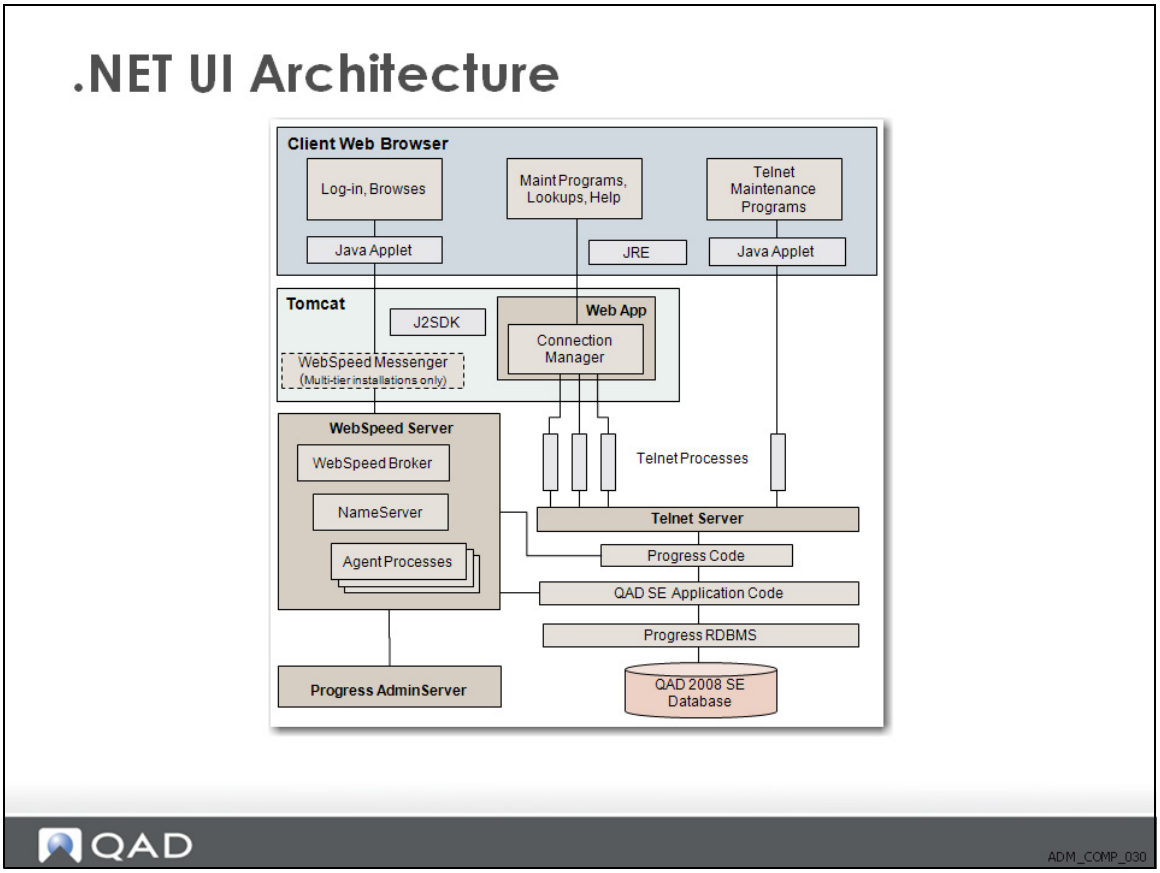



.NET Terminology
ProDataSet
An OpenEdge in-memory data store
Maps directly to an ADO.NET DataSet allowing us to:
Design a .NET interface in terms of .NET DataSets
Pass data back and forth to OpenEdge AppServer
QAD
ADM_TERM_120

Components


Overview
.NET UI Architecture
Tomcat
Connection Manager
Progress AppServer
Progress WebSpeed
Telnet Server
.NET UI Client
.NET UI Technology Overview
QAD
ADM_COMP_020

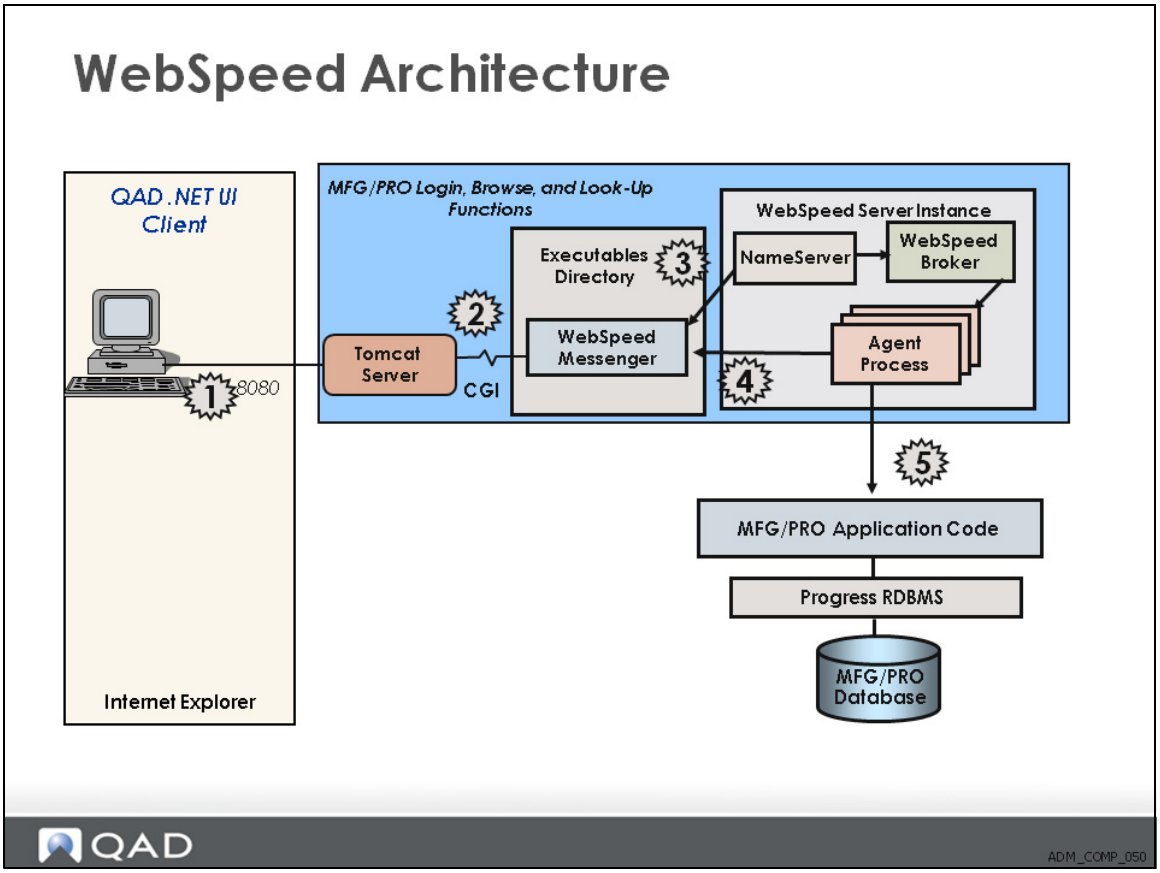
.NET UI Architecture



Webspeed

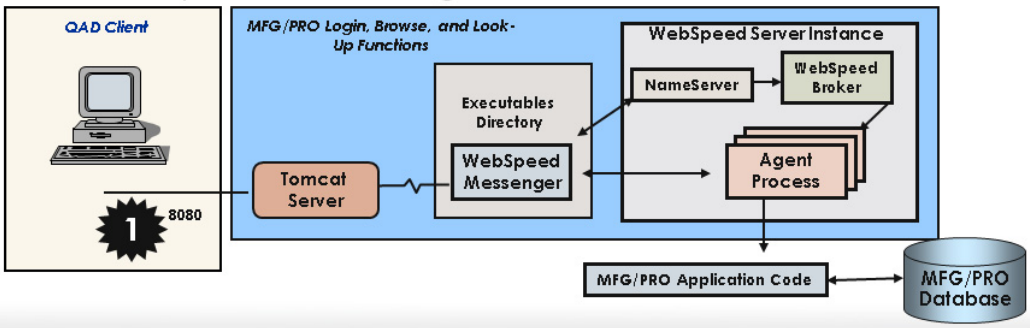

What is WebSpeed?
• WebSpeed is a Progress development and deployment environment that enables users to build robust, data-driven Internet Transaction Programs (ITP) for the intranet or Internet
• Enables you to create Web Objects (application modules) that map data to and from static HTML documents using the WebSpeed Workshop and WebSpeed 4GL
• Enables you to deploy your HTML pages and Web Objects to a run-time environment using the WebSpeed Transaction Server
QAD
ADM_COMP_040

Webspeed Architecture



WebSpeed Architecture

- Connection 1
  - Network Connection between the browser and the Tomcat server. Default server port is 8080
  - Tomcat server and WebSpeed messenger must be on the same machine
  - Tomcat server communicates with the WebSpeed messenger

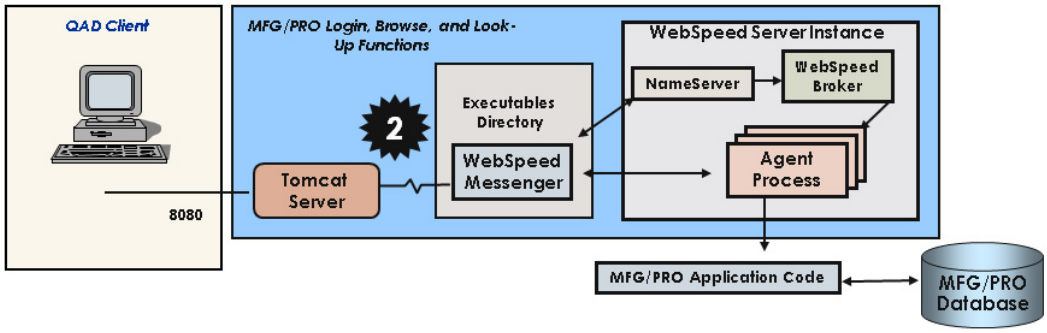


QAD

ADM_COMP_060

WebSpeed Architecture

- Connection 2
  - Tomcat server connection to the WebSpeed messenger
  - Uses script programs stored on the Tomcat server to communicate with the messenger
  - Messenger is a PROGRESS .exe file that takes a PROGRESS Web Object procedure (.w) as input and sends back an HTML page as output

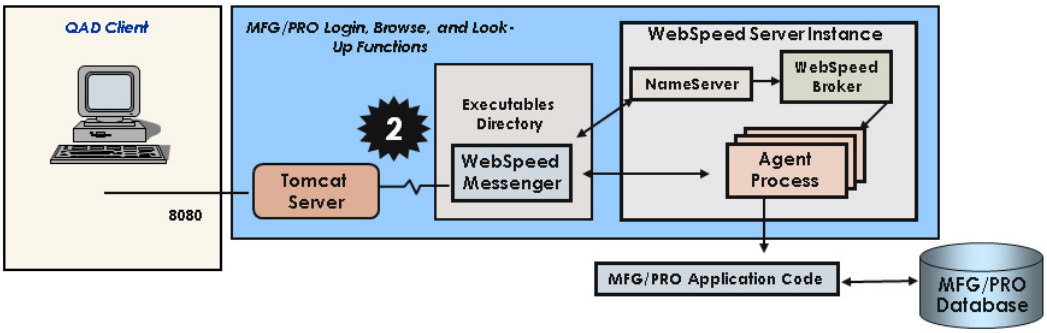


QAD

ADM_COMP_070

WebSpeed Architecture

- After processing, the agent returns its HTML output to the messenger for transfer back to the web server and finally to the browser

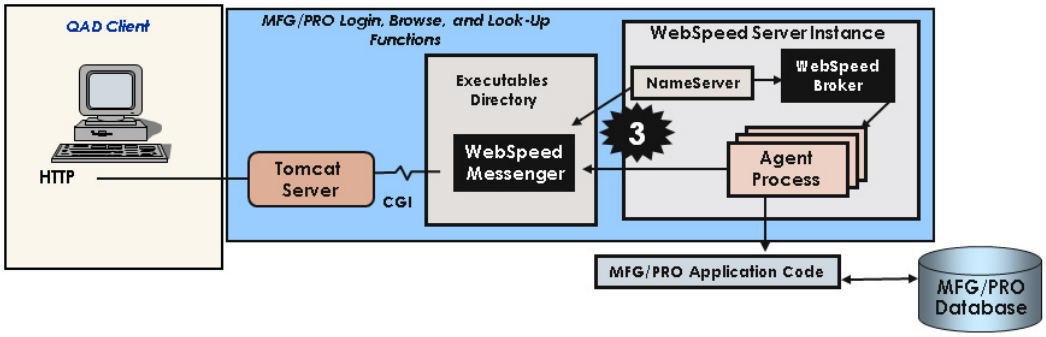


QAD

ADM_COMP_090

WebSpeed Architecture

- Connection 3
- Network connection between the messenger and the transaction broker
- Defined by the hostname and port defined in the `ubroker.properties` file

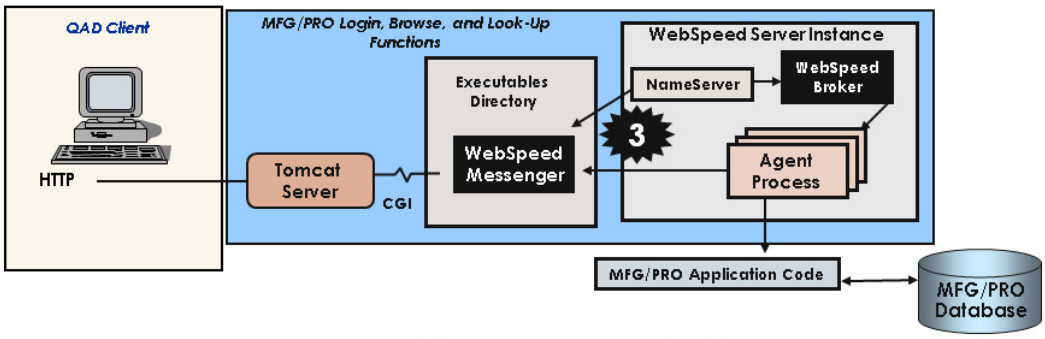


QAD

ADM_COMP_100

WebSpeed Architecture

- WebSpeed Transaction Broker is responsible for:
  - Receiving requests from the messenger on availability of an agent to service the web object
  - Replying to the messenger with the ID and port of the available agent
  - Spawning a new agent if none available and not at the limit

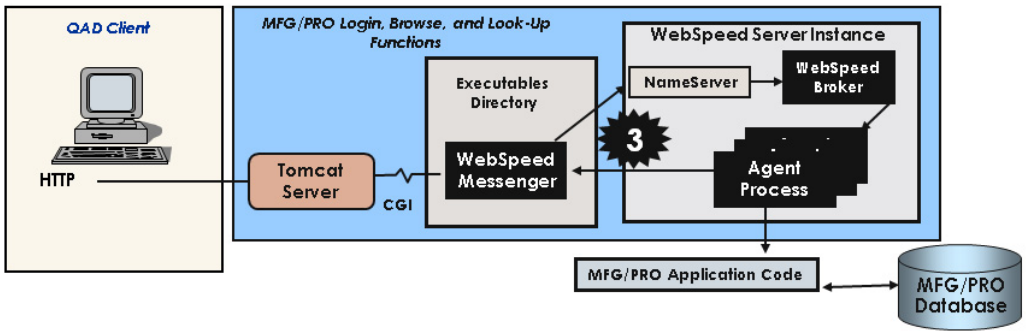


QAD

ADM_COMP_110

WebSpeed Architecture

- The WebSpeed broker will assign an agent
  - If at the limit, sends message to messenger that no agents are available
  - Provides the status and states of running agents
    - STARTING, AVAILABLE, LOCKED, BUSY

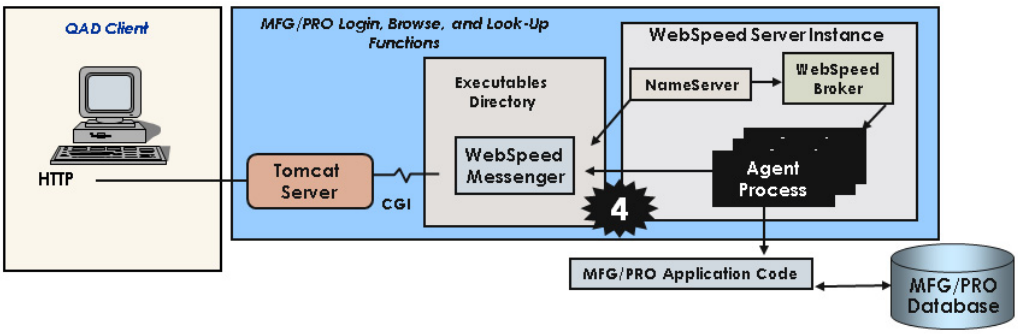


QAD

ADM_COMP_120

WebSpeed Architecture

- Connection 4:
  - Network connection between the WebSpeed transaction agents and web server
  - Defined by the hostname and port defined in the the `ubroker.properties` file

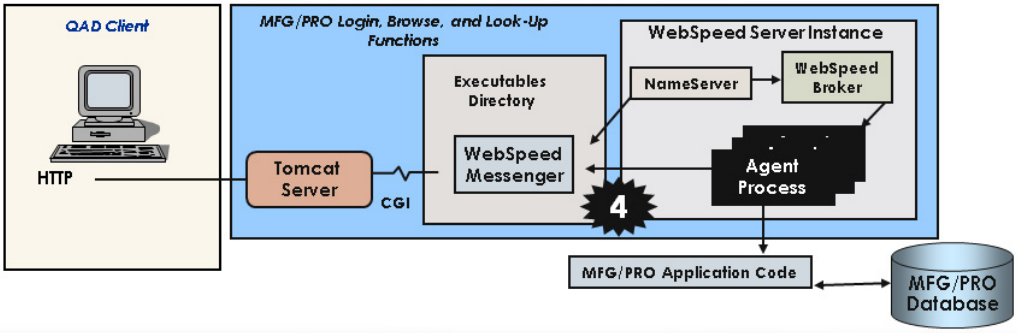


QAD

ADM_COMP_130

WebSpeed Architecture

- WebSpeed Transaction Agent:
  - A Progress client (_progres) with modifications to work with WebSpeed
  - Agents accept requests from the messenger in the form of a URL, parse the URL for the name of the web object to execute, and then run it
  - Passes output back to the messenger

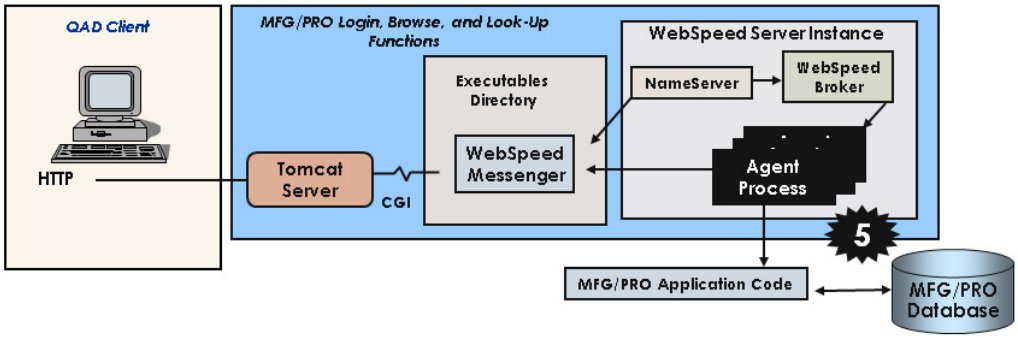


QAD

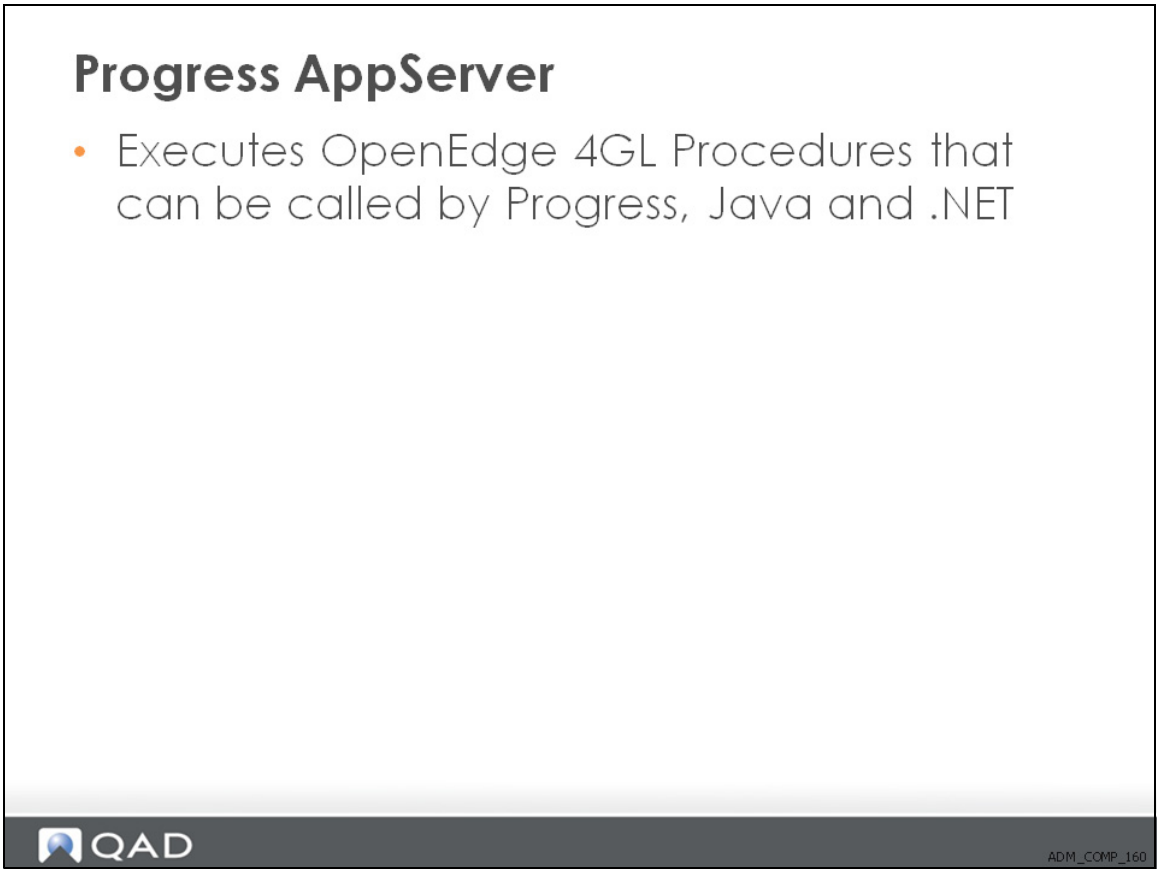
ADM_COMP_140

WebSpeed Architecture

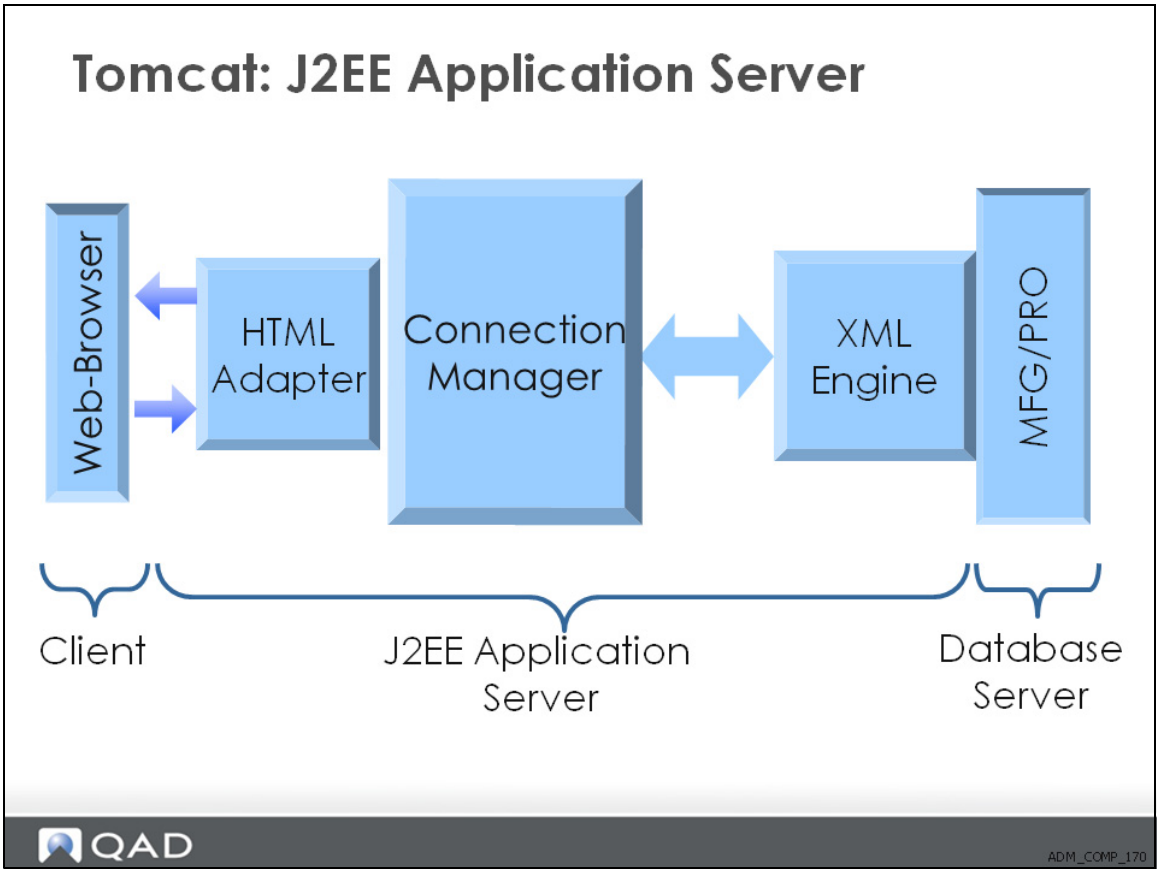
- Connection 5:
  - Connection between agents and the database
  - The WebSpeed Agents can connect to the databases in either Client/Server or shared memory mode



Progress AppServer



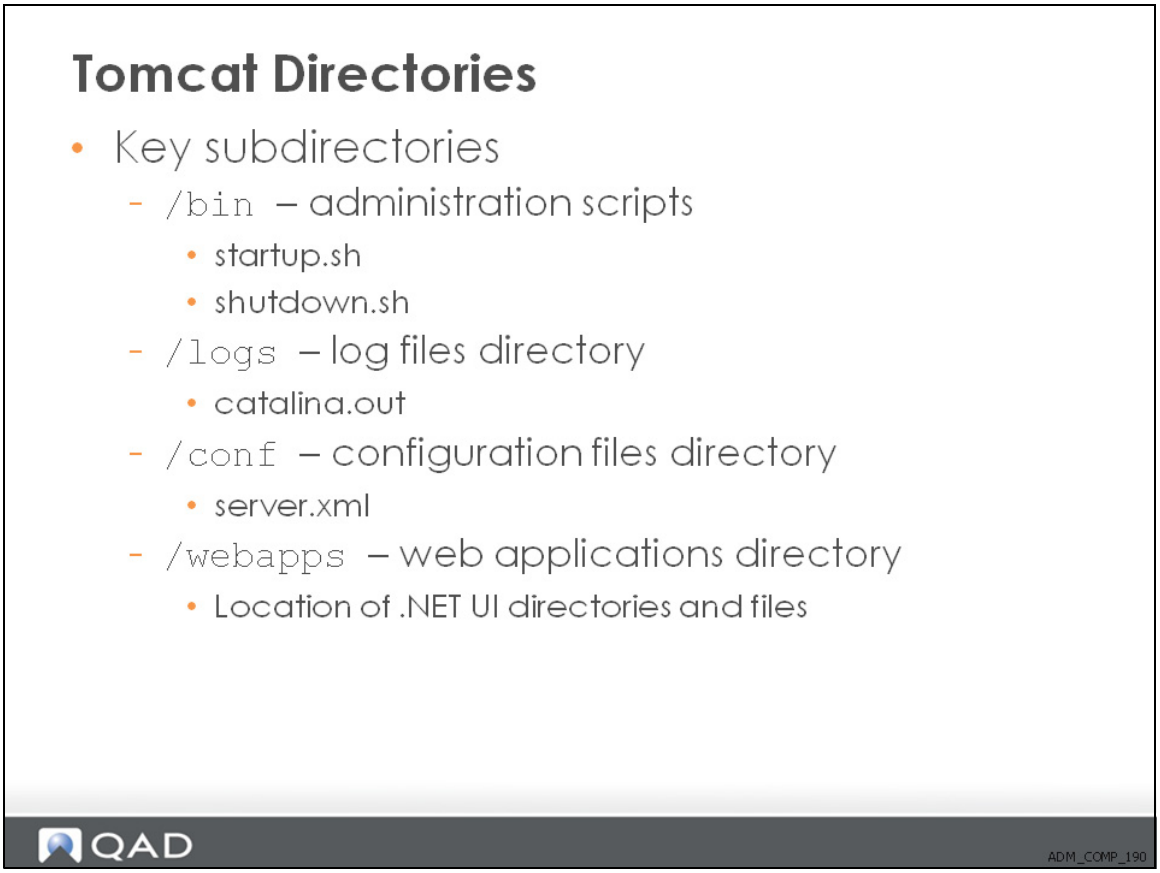
Tomcat J2EE Application Server

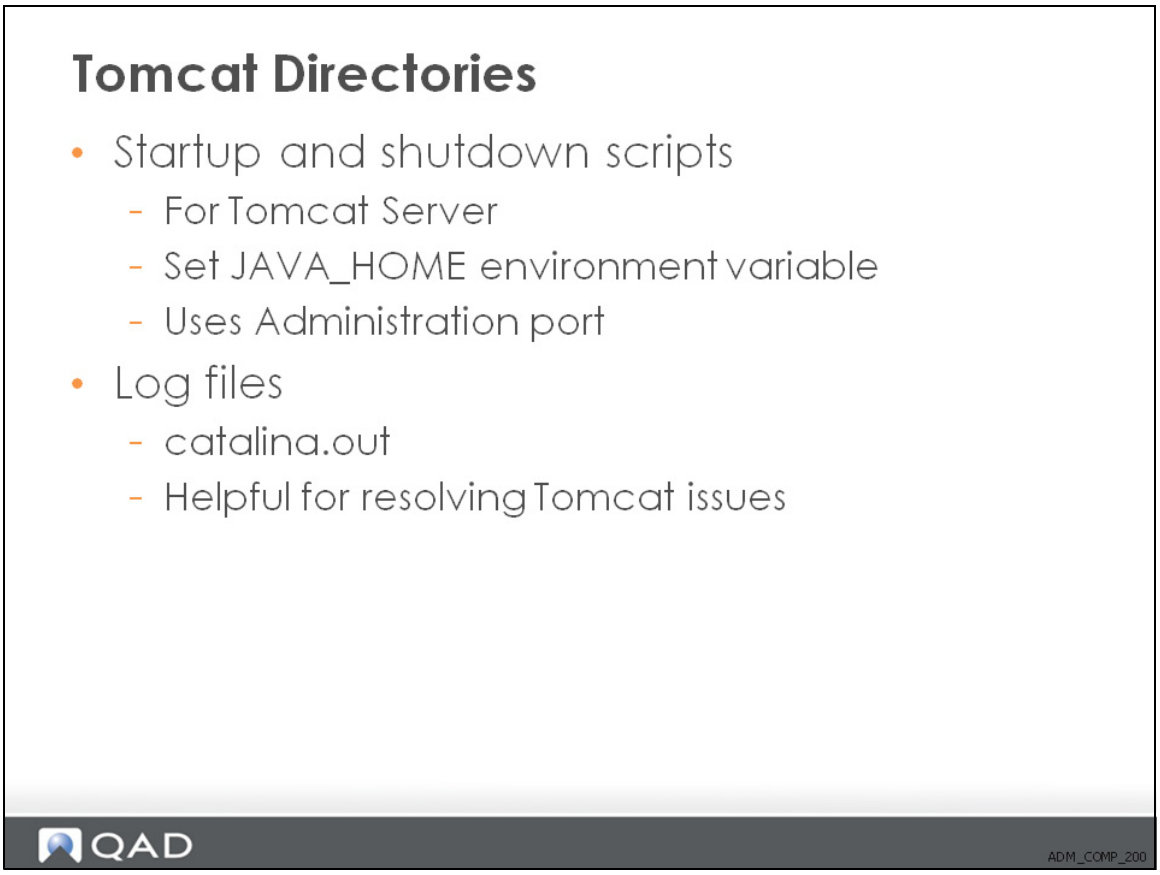


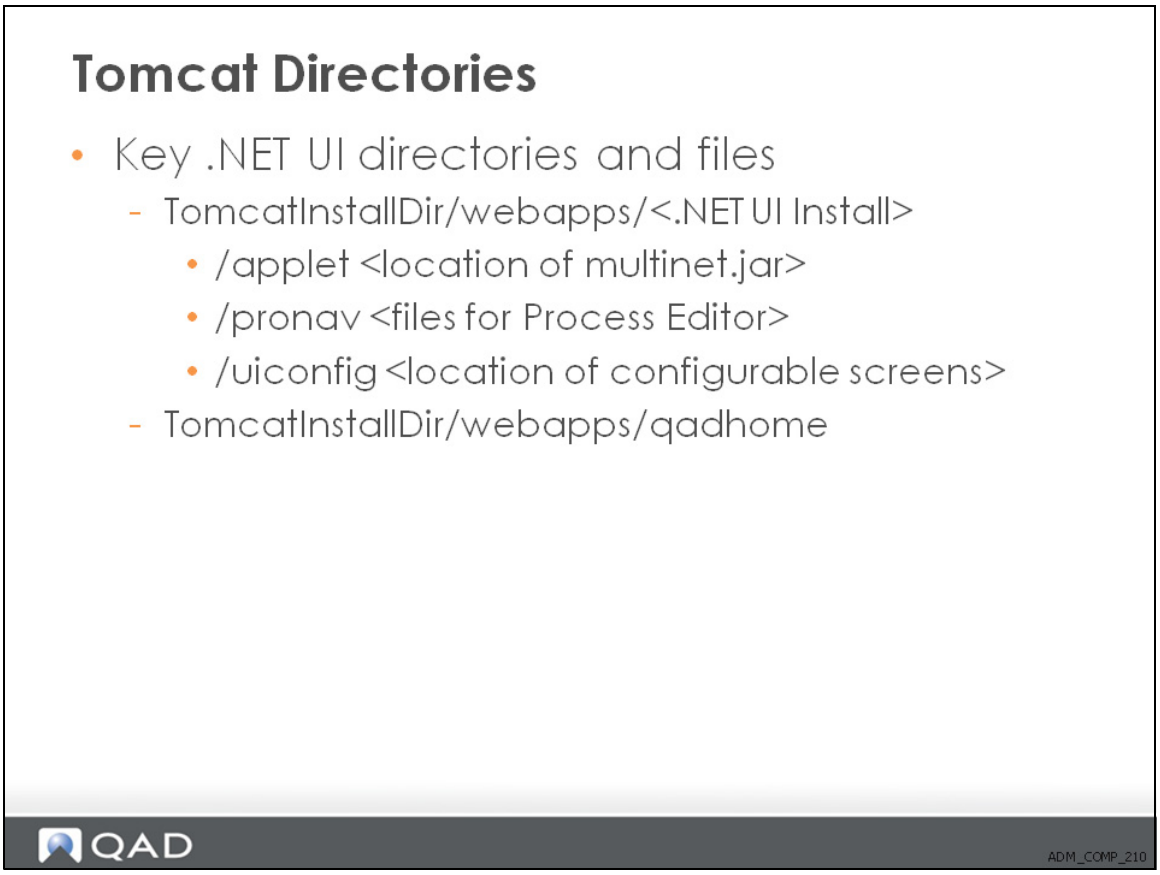
Tomcat

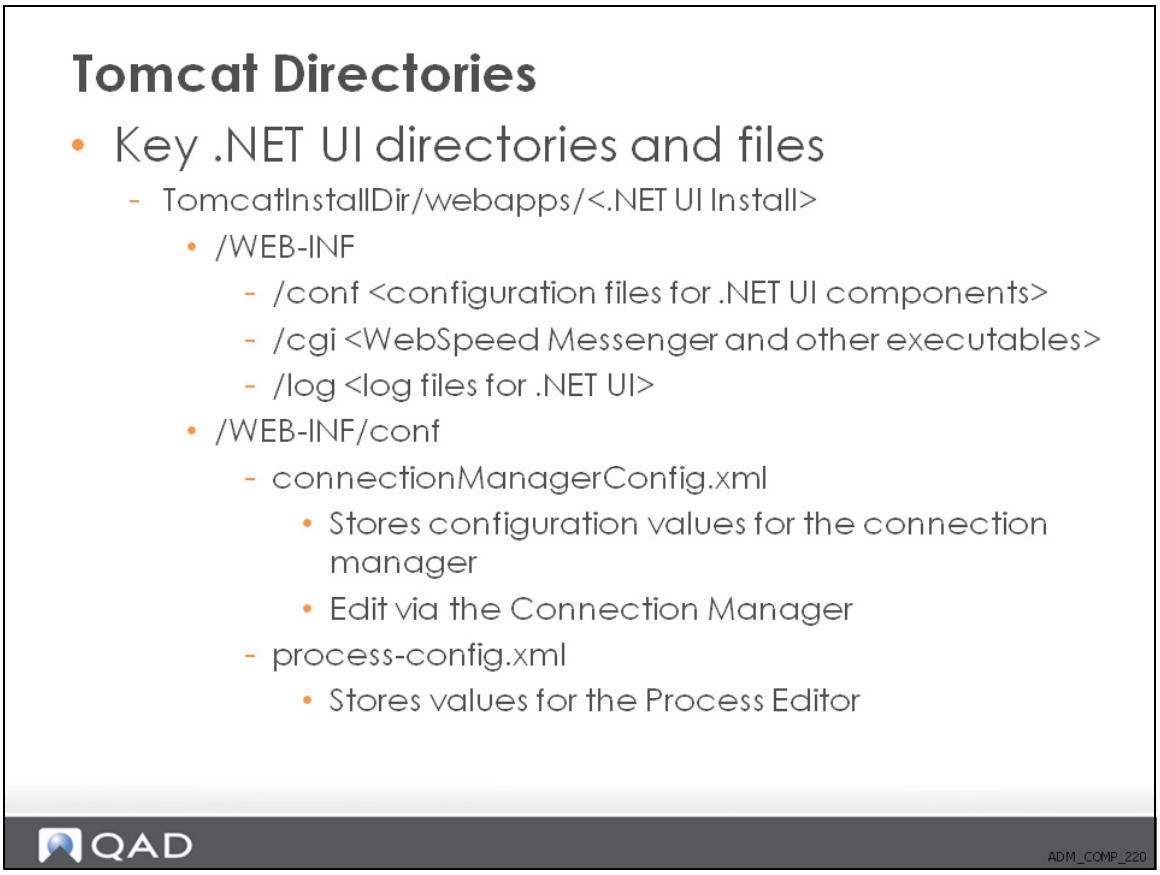

Tomcat
Java-based web application container
Runs servlet in JSP
QAD
ADM_COMP_180

Tomcat Directories

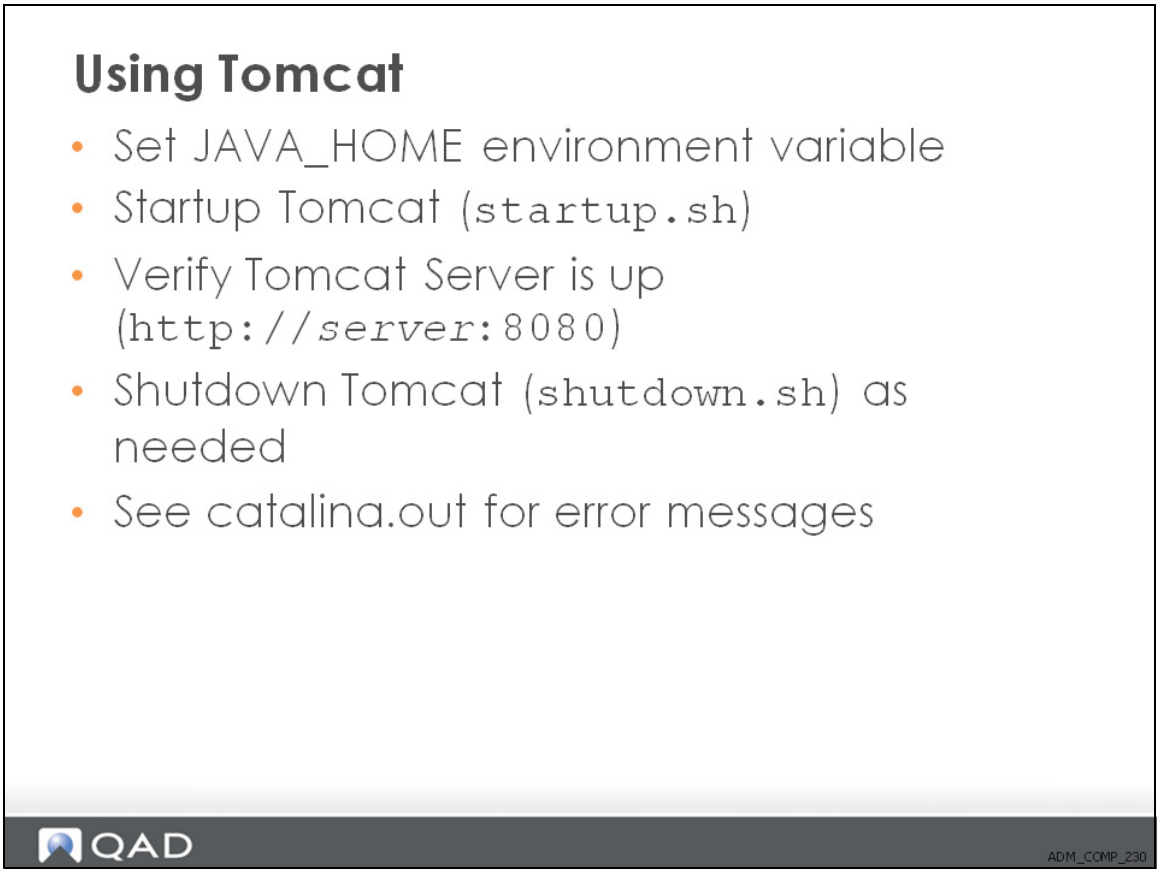



Tomcat Directories
• Startup and shutdown scripts
- For Tomcat Server
- Set JAVA_HOME environment variable
- Uses Administration port
• Log files
- catalina.out
- Helpful for resolving Tomcat issues
QAD
ADM_COMP_200

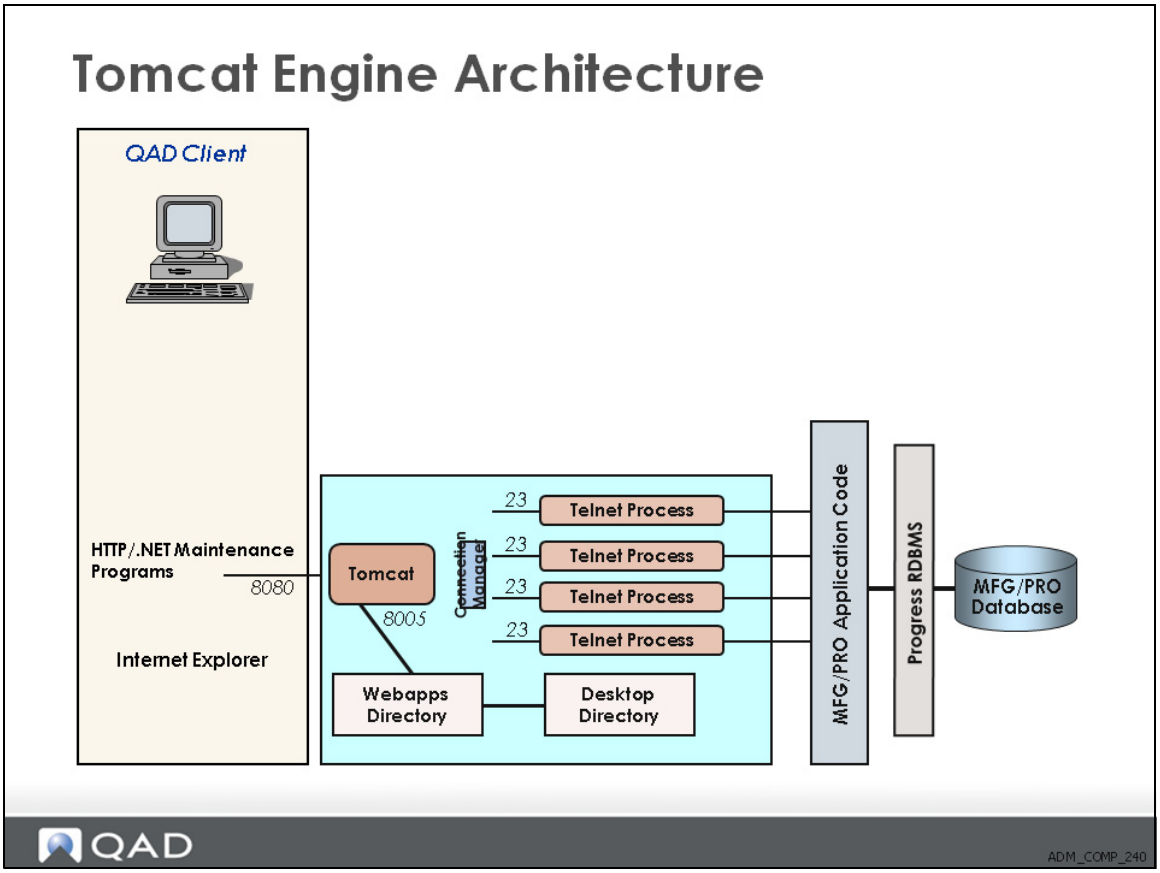

Tomcat Directories
• Key .NET UI directories and files
- TomcatInstallDir/webapps/<.NET UI Install>
• /applet <location of multinet.jar>
• /pronav <files for Process Editor>
• /uiconfig <location of configurable screens>
- TomcatInstallDir/webapps/qadhome
QAD
ADM_COMP_210


Tomcat Directories
• Key .NET UI directories and files
- TomcatInstallDir/webapps/<.NET UI Install>
• /WEB-INF
- /conf <configuration files for .NET UI components>
- /cgi <WebSpeed Messenger and other executables>
- /log <log files for .NET UI>
• /WEB-INF/conf
- connectionManagerConfig.xml
• Stores configuration values for the connection manager
• Edit via the Connection Manager
- process-config.xml
• Stores values for the Process Editor
QAD
ADM_COMP_220

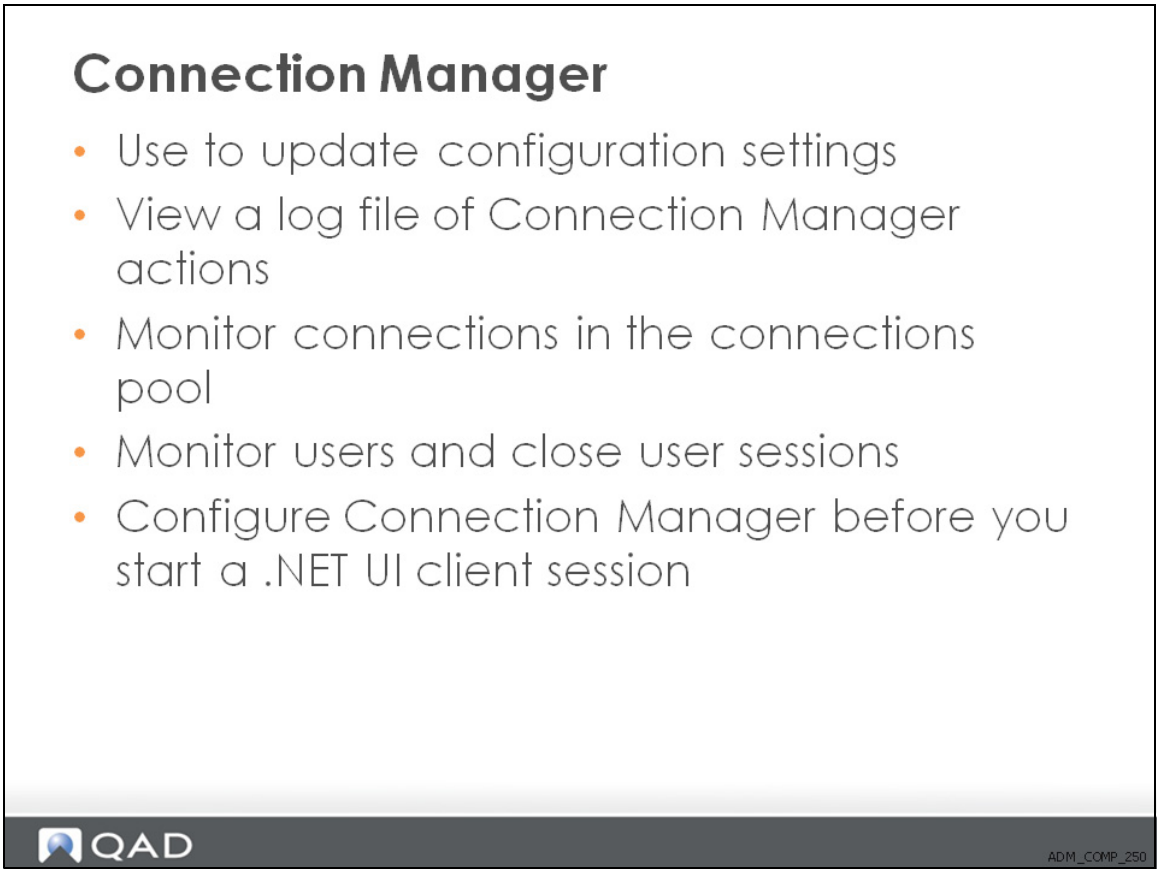
Using Tomcat

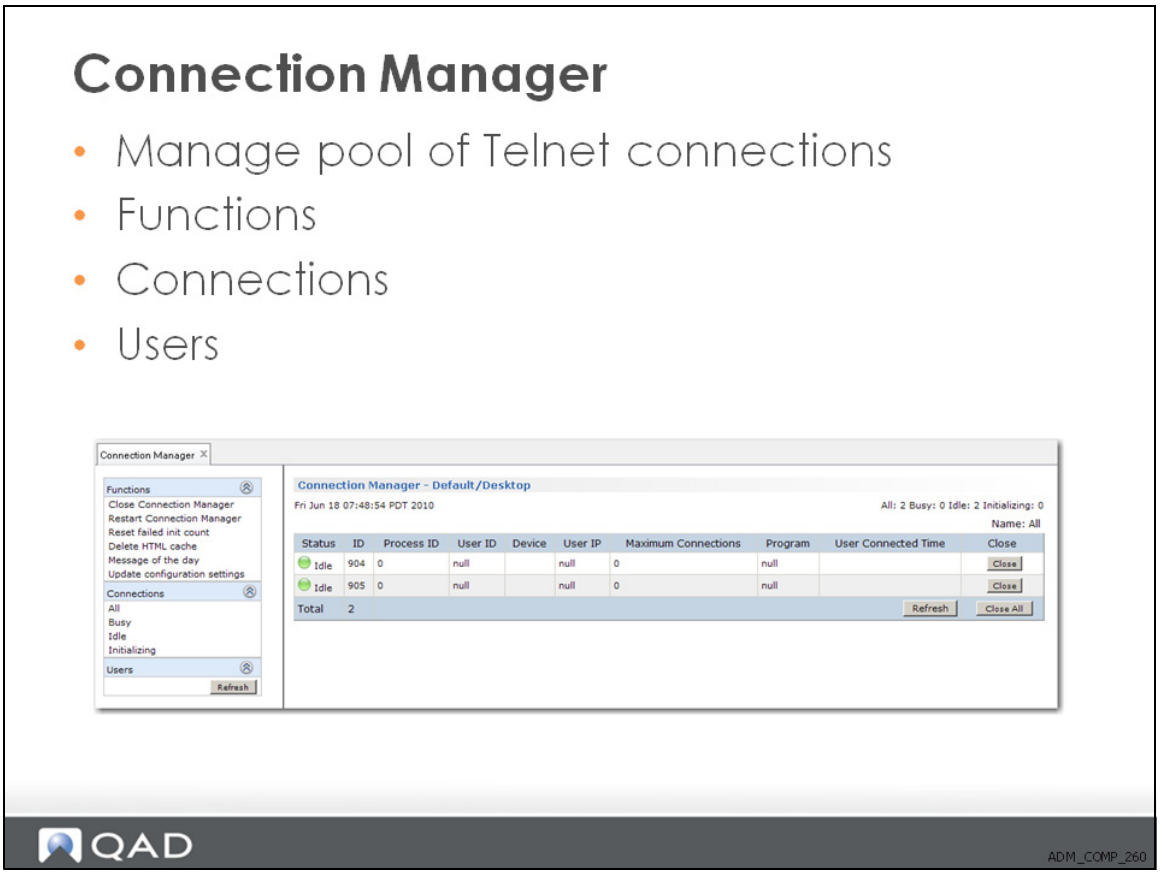


Tomcat Engine Architecture



Connection Manager



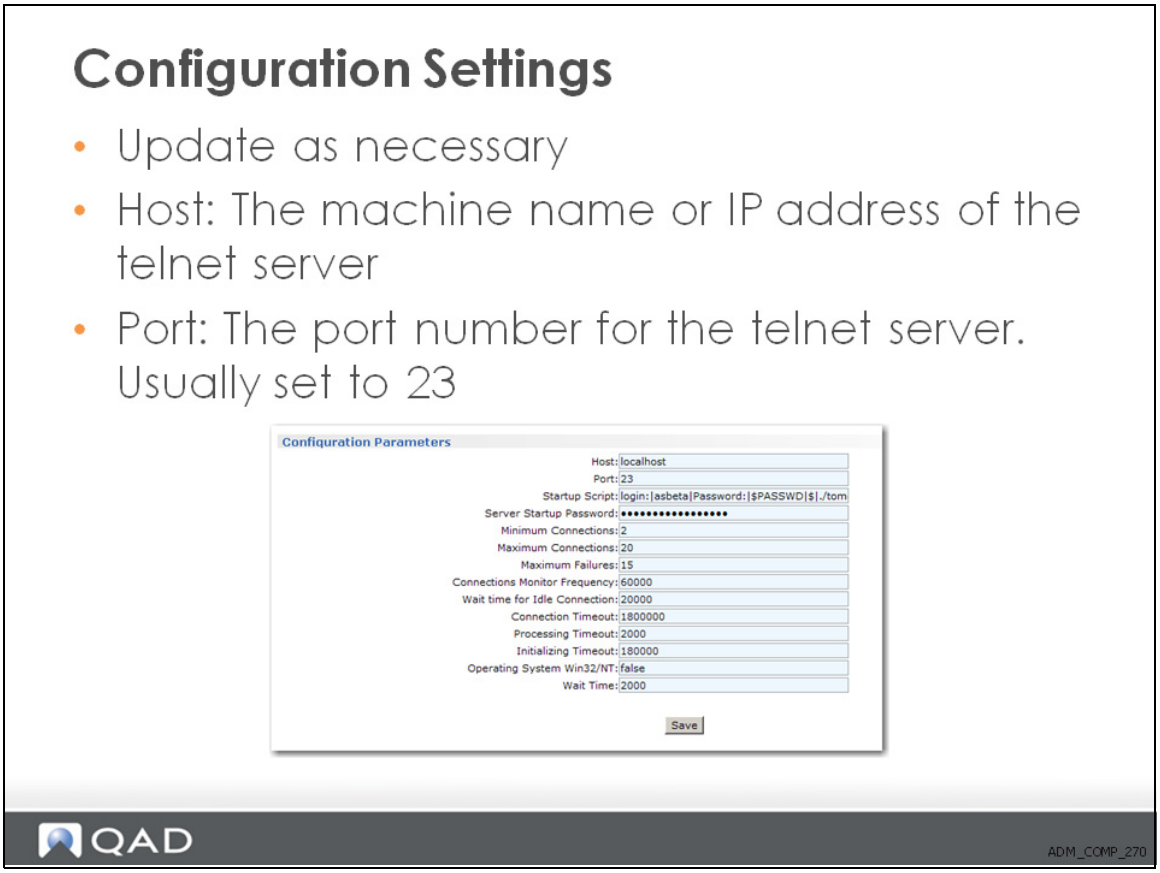


The Connection Manager controls the pool of telnet sessions used for HTML-based maintenance programs, lookups, reports, and inquiries. The Connection Manager lets you:

- Close, start, and reset Connection Manager.
- Update configuration settings.
- View a log file of Connection Manager actions.
- Monitor connections in the connection pool.
- Monitor users and close user sessions, if needed.

Once Connection Manager is configured, you can start a .NET UI client session.

Configuration Settings



Close Connection Manager. Terminates all active connections. Any data being processed by active UI sessions is lost. Any processes begun by active sessions are terminated.

Restart Connection Manager. Shuts down and restarts Connection Manager. This option has the same effect as Close Connection Manager, but also restarts it after complete shutdown.

Reset failed init count. Resets the initialization failed counter. The system maintains a count of the number of times Connection Manager unsuccessfully attempts to start a session. When this counter reaches the maximum number, as indicated in Maximum Failures on the Connection Manager configuration page, it stops further automatic attempts to start the session.

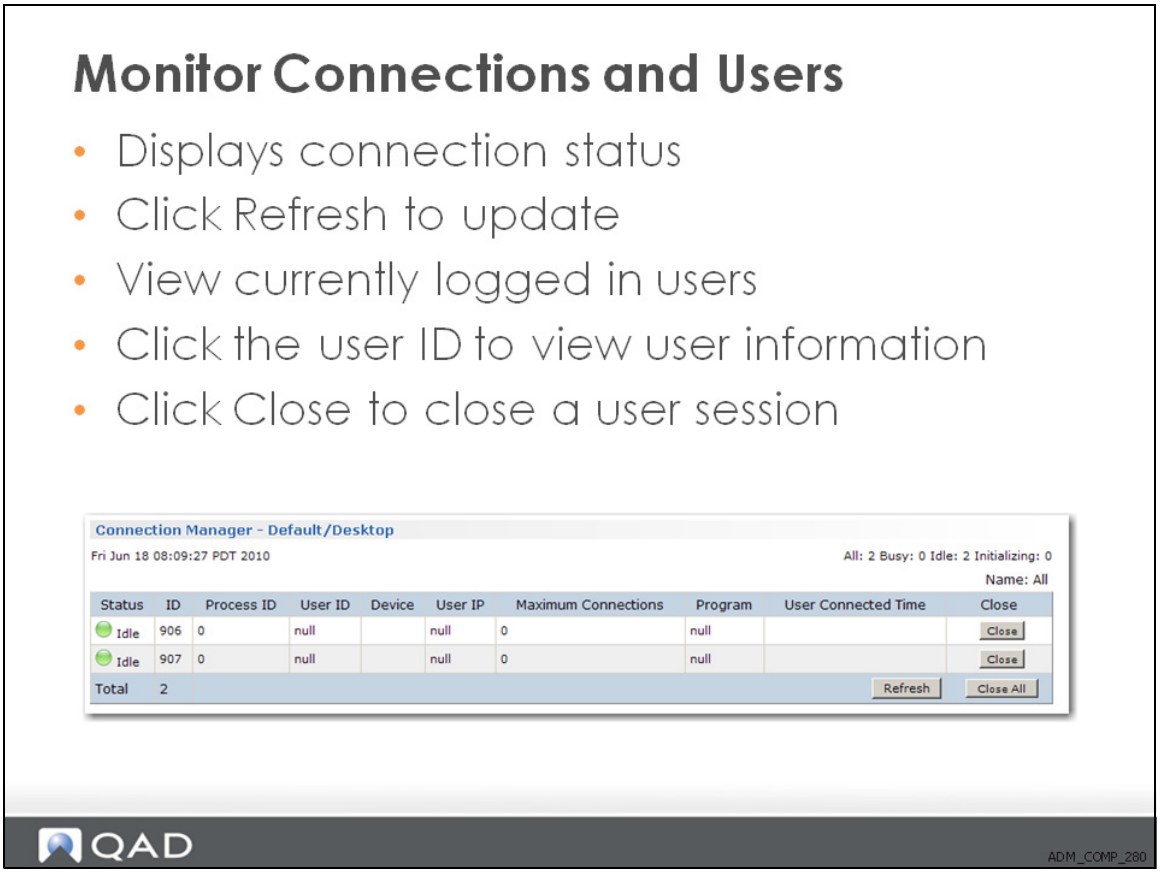
This number is automatically reset when a successful connection is made.

Delete HTML cache. This option clears all cached maintenance screens. Removing the cache is required whenever updates are made to screen elements—such as adding lookups to a field—to ensure that the new screen information is read by the system.

Message of the day. Select this option to set up a brief message that displays in the header of the main page each time a user logs in. A screen displays where you can enter up to 80 characters of message text. Use the message to alert users of upcoming system maintenance, other updates, or other business needs. You can specify how long the message displays.

Update configuration settings. Displays the Configuration Settings Update page , which is used to set up and configure the Connection Manager options.

Monitoring Connections and Users



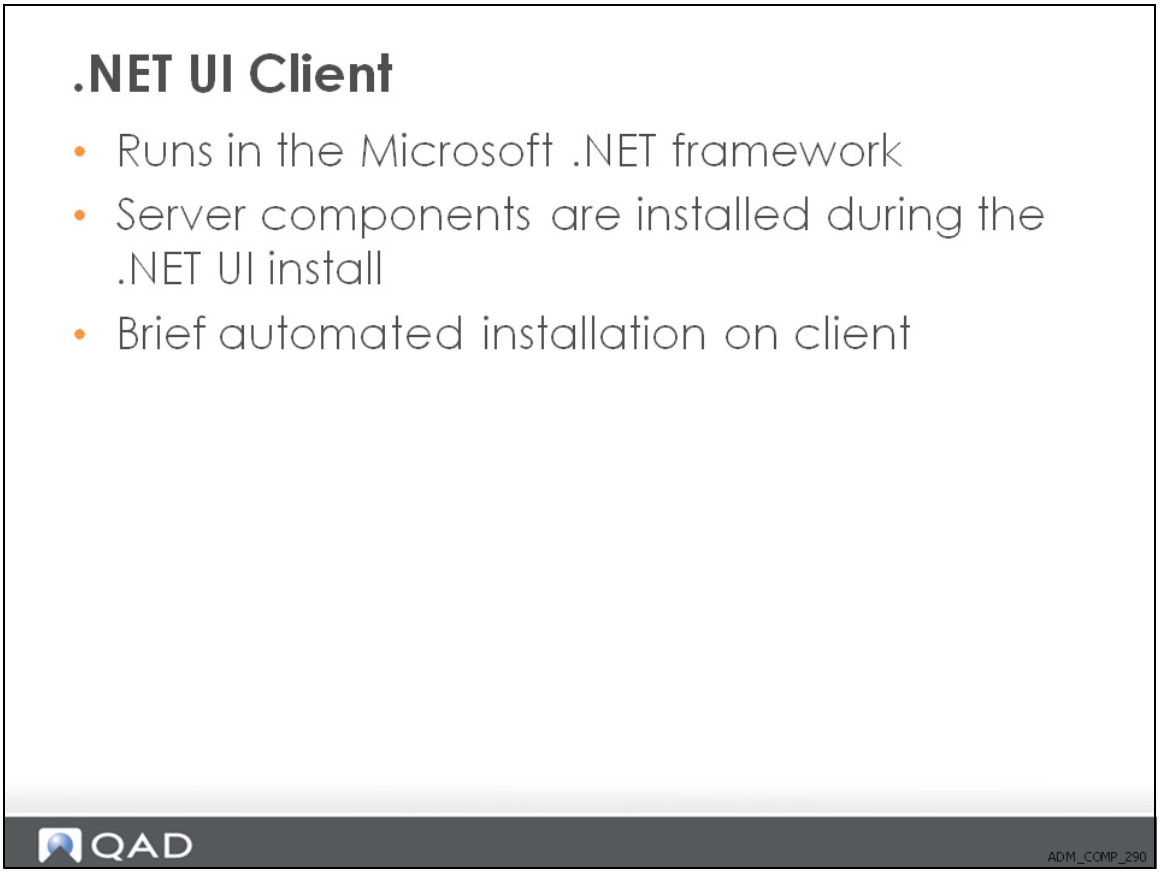
- Initializing. The session is starting and is not available for use.
- Idle. The session is active and available for the next user request.
- Busy. The session is executing a user request.
- Pause. The session is waiting for a response from the user; for example, the user may need to press the spacebar to continue.
- Processing. The session is actively updating the Progress database and database records are locked.
- Force Disconnect. This is a temporary state that occurs when the administrator closes an initializing session.
- Disconnected. This is a temporary state that occurs when idle sessions are closed.

Click a User ID to see information related to that user, including the following: Status, ID, Process ID, User ID, Device, User IP, Maximum Connections, Program, and User Connected Time.

Click Refresh to update the display.

Click Close to close a user session. This might be needed if a user has locked a database record and left their session running

.NET UI Client



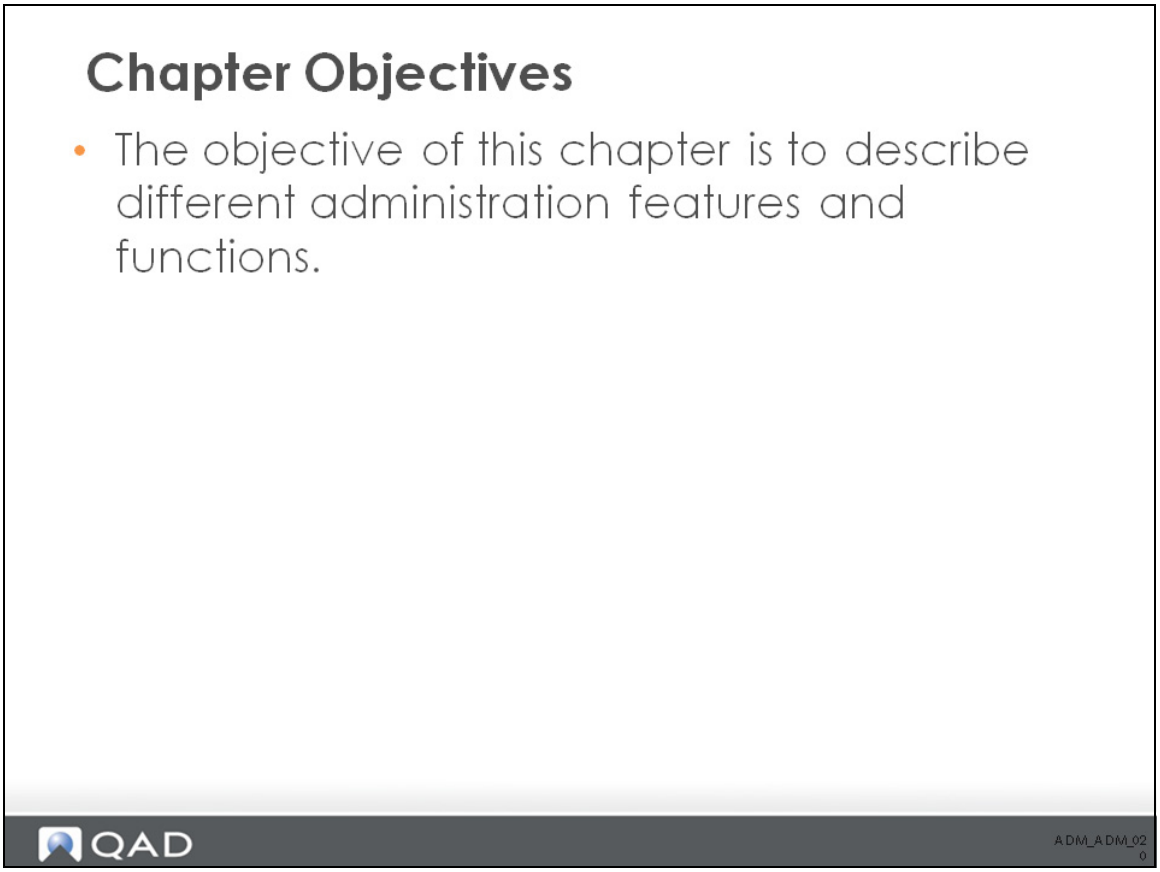
Exercises and Knowledge Check

1. What is the default port number for the Tomcat server?
2. You must install the Tomcat server and WebSpeed Messenger on the same machine. True or False?
3. The hostname and port number of the connection between WebSpeed Messenger and transaction broker is contained in which properties file?
4. .NET UI files and directories are contained in which directory?
5. The `web-inf` directory contains configurationh files, WebSpeed Messenger and other executables, and log files. True or False ?
6. What is the command for starting Tomcat?

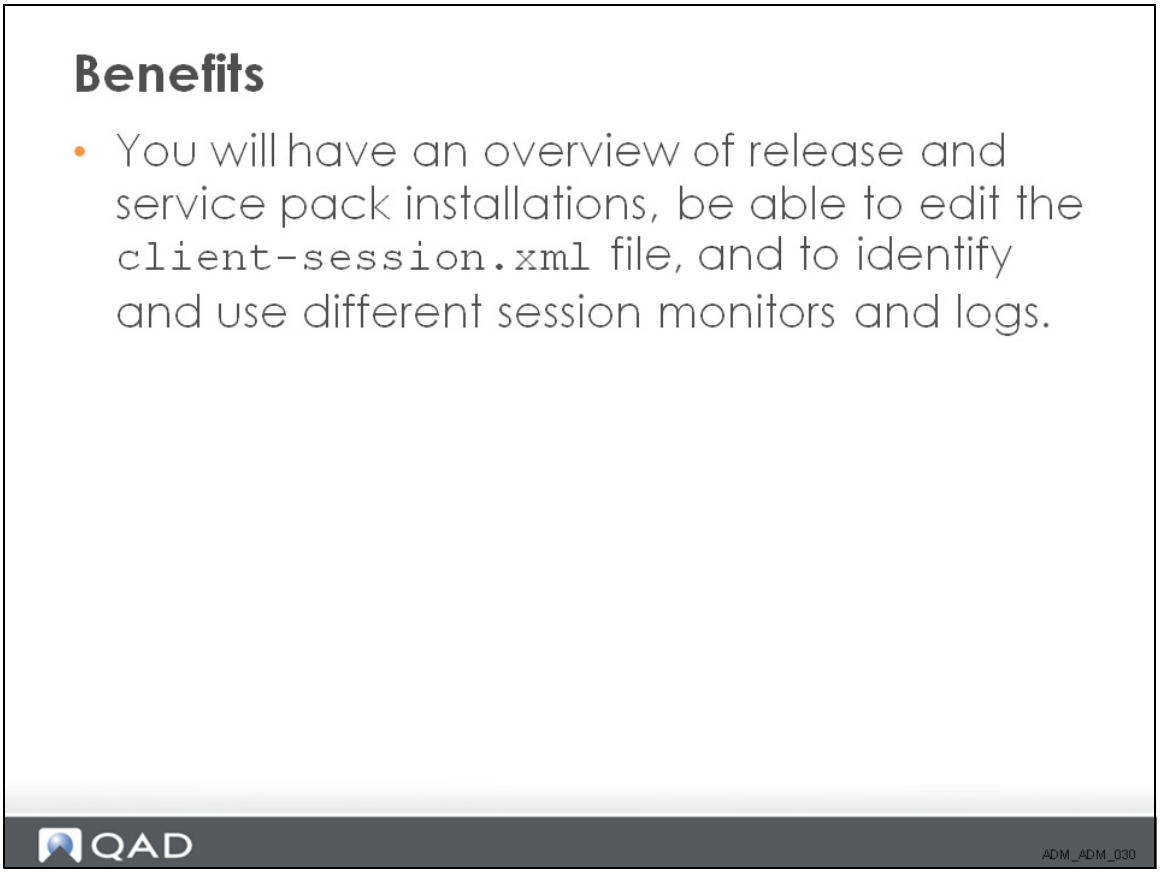
Chapter 2

QAD .NET UI Administration

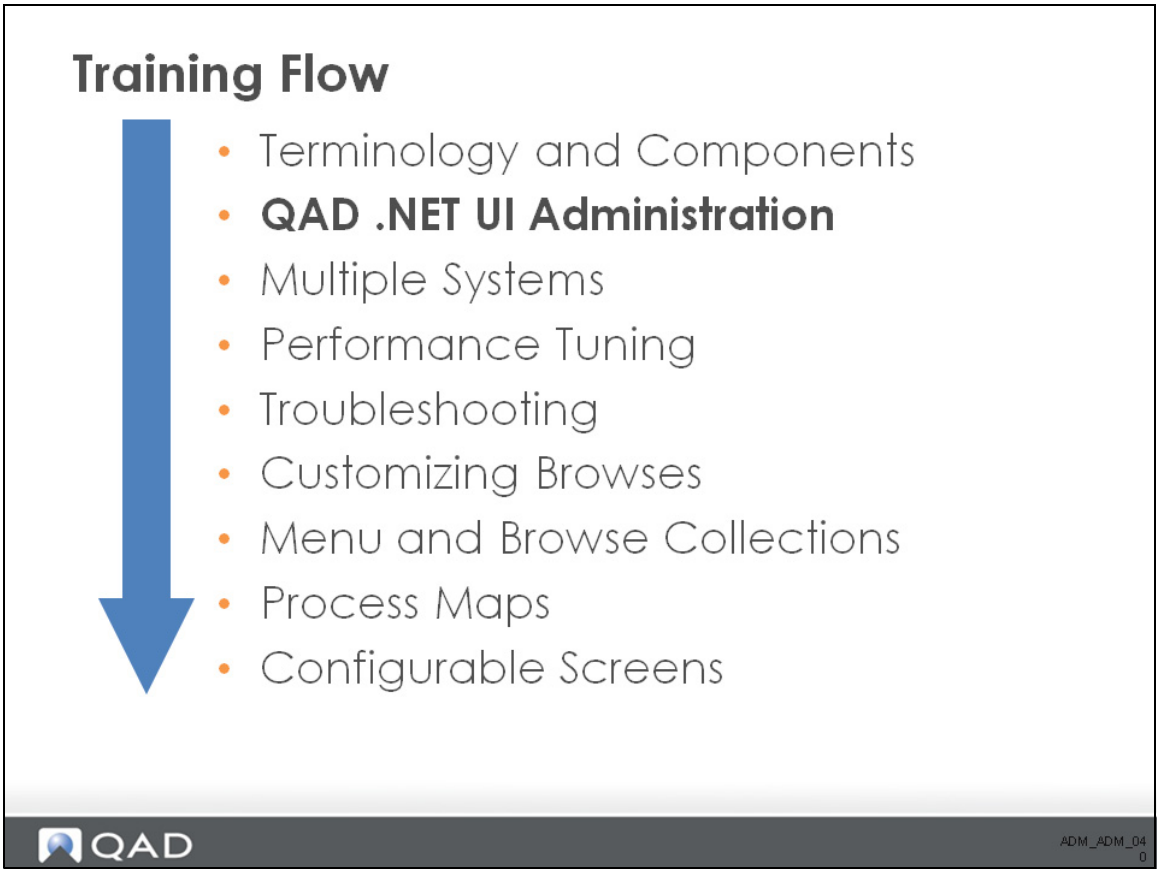
Chapter Objectives



Benefits


Benefits
You will have an overview of release and service pack installations, be able to edit the client-session.xml file, and to identify and use different session monitors and logs.
QAD
ADM_ADM_030

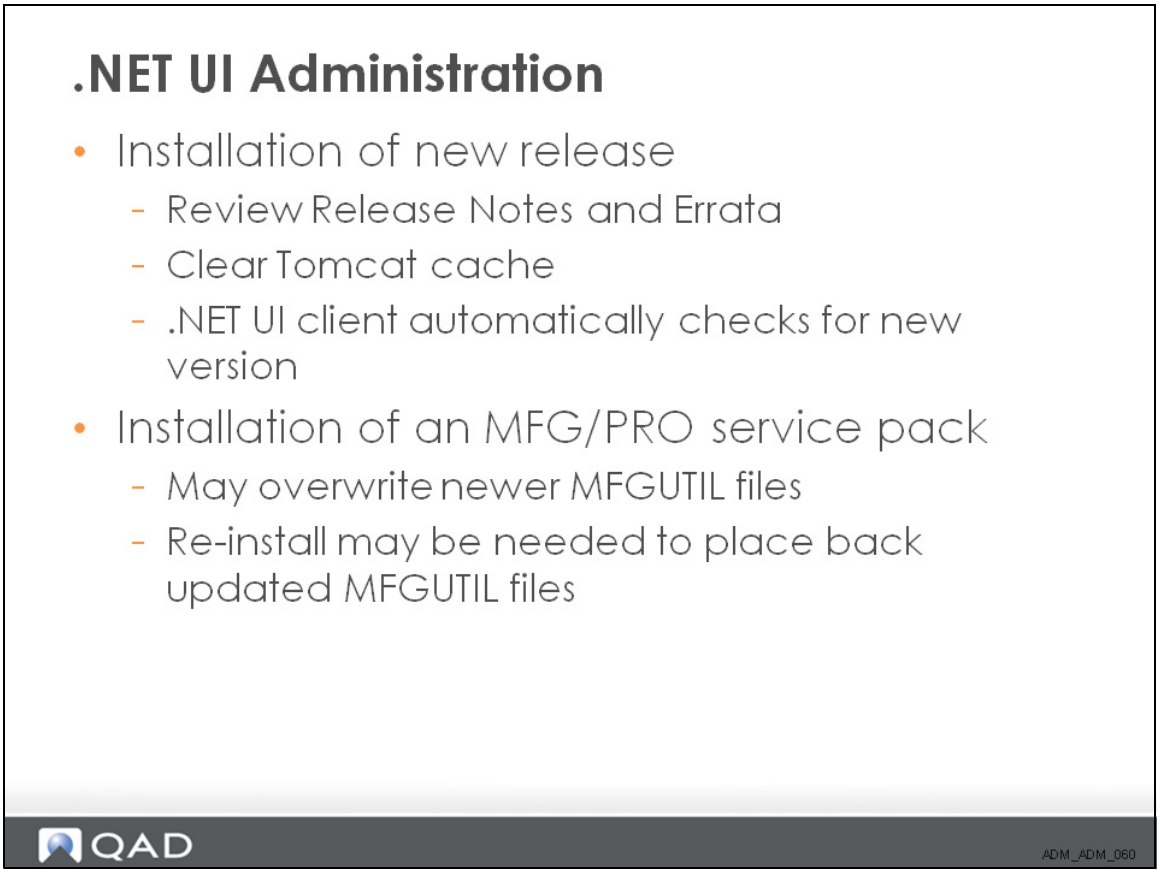
Training Flow



Overview


Overview
.NET UI Administration
Installation of New Release
Installation of an MFG/PRO Service Pack
Client session configuration file: client-session.xml
Applying System-Wide Settings
Excluding MFG/PRO Menus in .NET UI
Set Session Configuration
Session Monitoring
Adding Custom Menus
QAD
ADM_ADM_050

QAD .NET UI Administration



.NET UI Administration

- Client Session Configuration File:
  - `client-session.xml`
  - Located on the server in `<Tomcat Install>/webapps/qadhome/configurations/qaduiConfig>/client-session.xml`
  - Contains configuration for NameServer, AppServer and WebSpeed broker names and ports

QAD

ADM_ADM_070

.NET UI Administration

- Client Session Configuration File:
  - client-session.xml

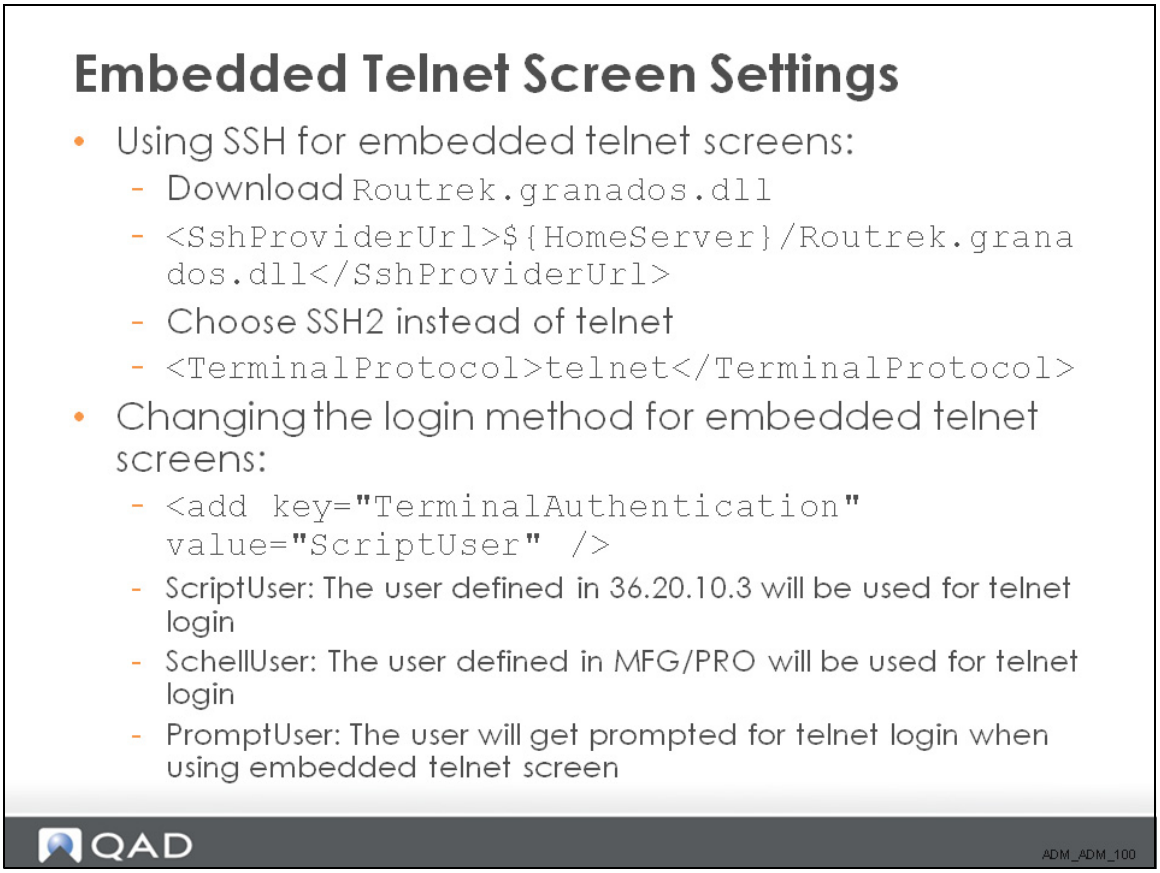
```
<?xml version="1.0" encoding="utf-8" ?>
<Configuration>
   <ConnectionProtocol>AppServer</ConnectionProtocol>
   <ConnectionSecureProtocol>AppServer</ConnectionSecureProtocol>
   <ConnectionHost>qaddemo.qad.com</ConnectionHost>
   <ConnectionPort>5162</ConnectionPort>
   <ConnectionService>qaddemo_AS</ConnectionService>
   <ConnectionSecureService>qaddemo_AS</ConnectionSecureService>
   <ConnectionSecureHost>qaddemo.qad.com</ConnectionSecureHost>
   <ConnectionSecurePort>5162</ConnectionSecurePort>
   <DesktopProtocol>http</DesktopProtocol>
   <DesktopHost>qaddemo.qad.com</DesktopHost>
   <DesktopPort>8080</DesktopPort>
   <DesktopService>qaddemo</DesktopService>
   <DesktopAPI>shell.jsp</DesktopAPI>
   <DesktopAsWebBrowser>false</DesktopAsWebBrowser>
   <WebSpeedService>qaddemo_WS</WebSpeedService>
   <WebSpeedPath>cgi-bin/wspd_cgi.ksh/WService</WebSpeedPath>
   <WebSpeedProgram>com/qad/desktop/interface/wsep1.p</WebSpeedProgram>
```

QAD

ADM_ADM_080

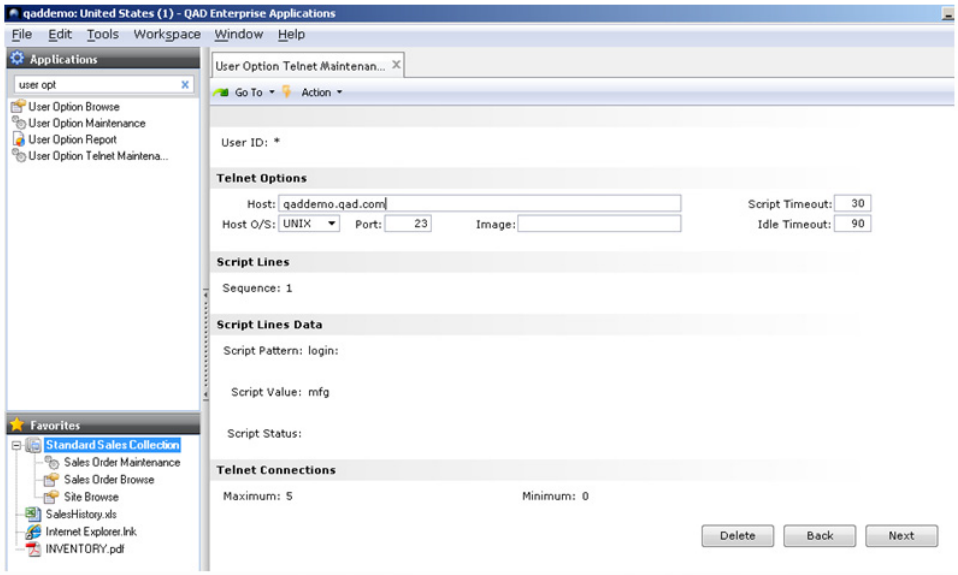
JAVA Terminology

Telnet Screen Settings



Embedded Telnet Screen Settings

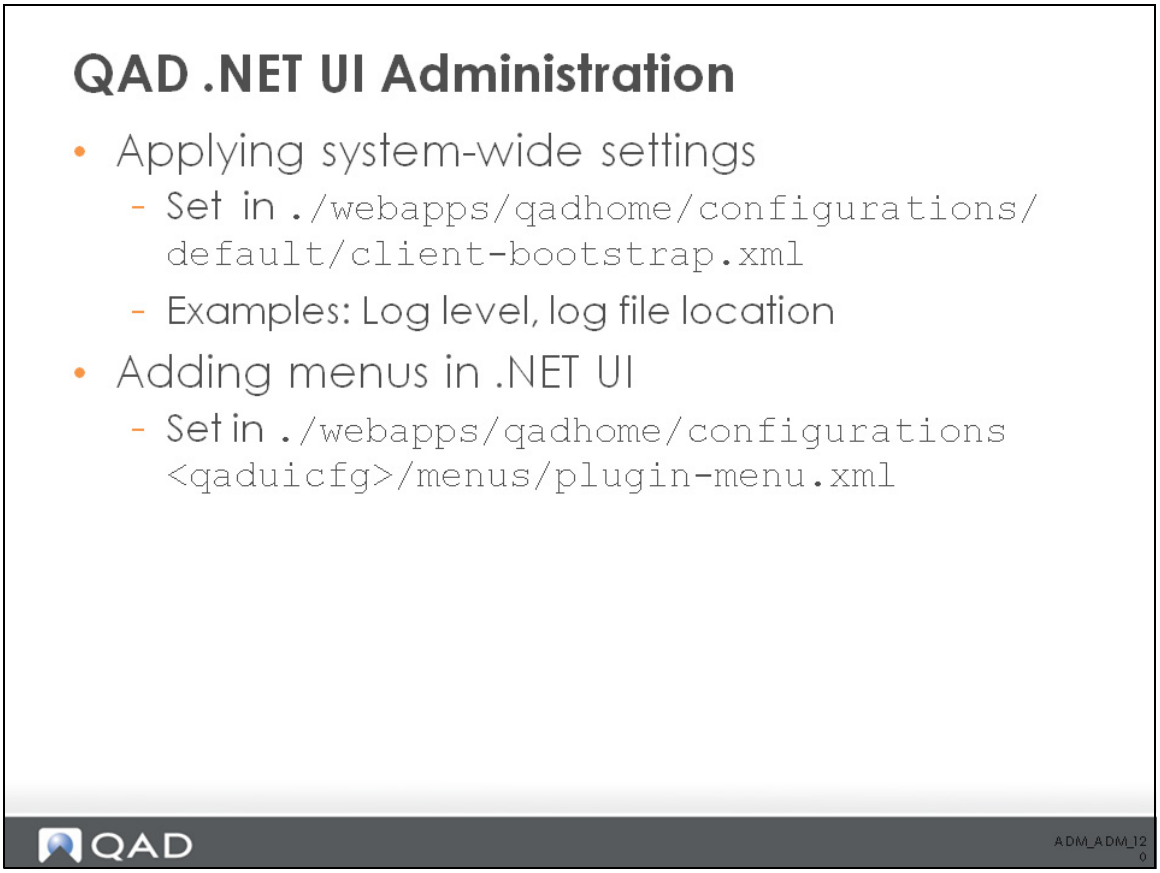
- Embedded telnet screen login is defined in 36.20.10.3:



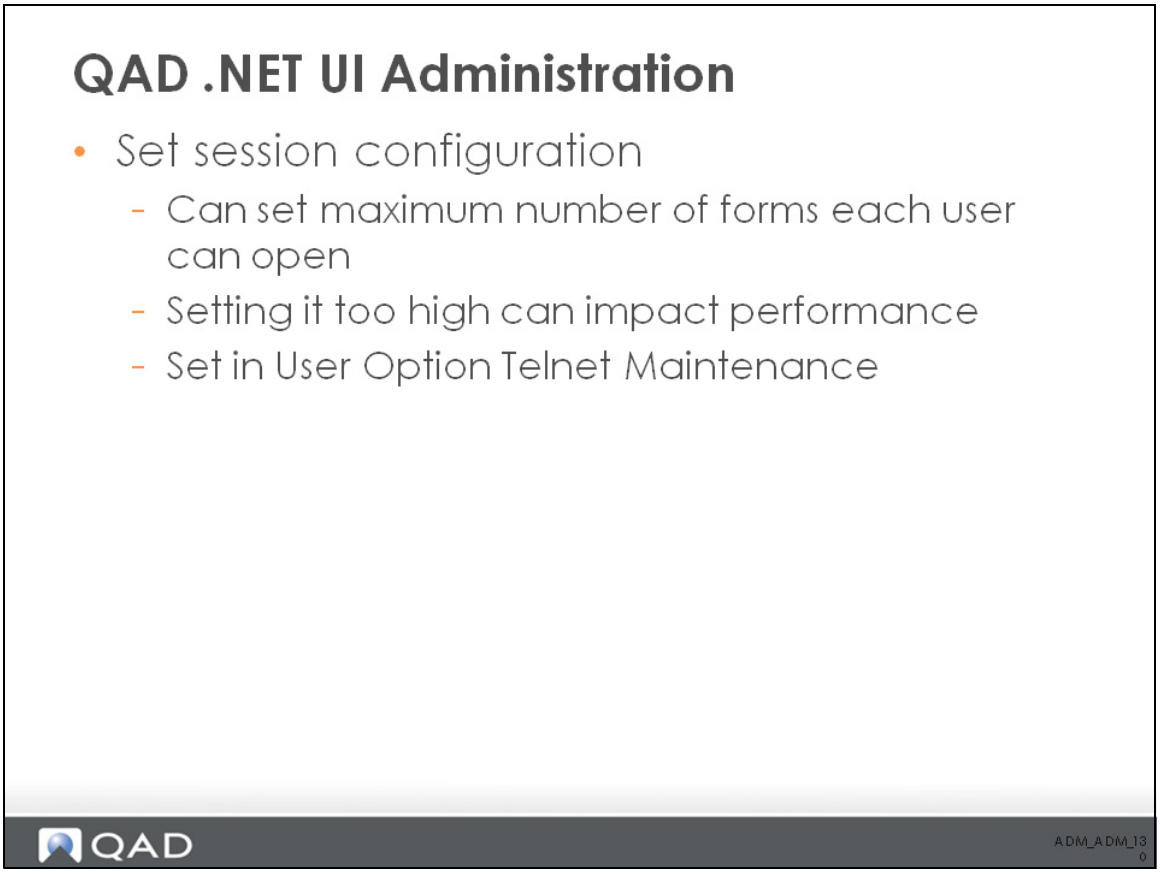
QAD

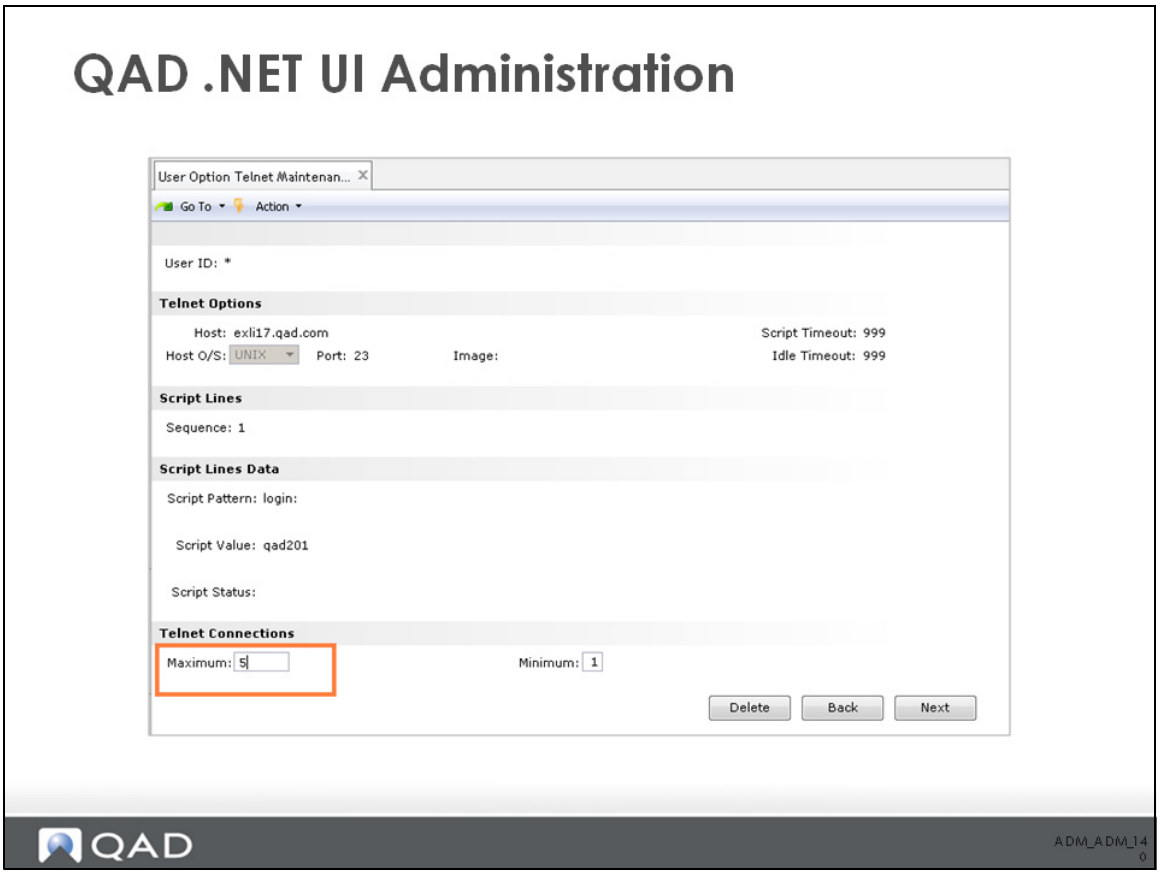
ADM_ADM_110

System-Wide Settings and Menus



Session Configuration



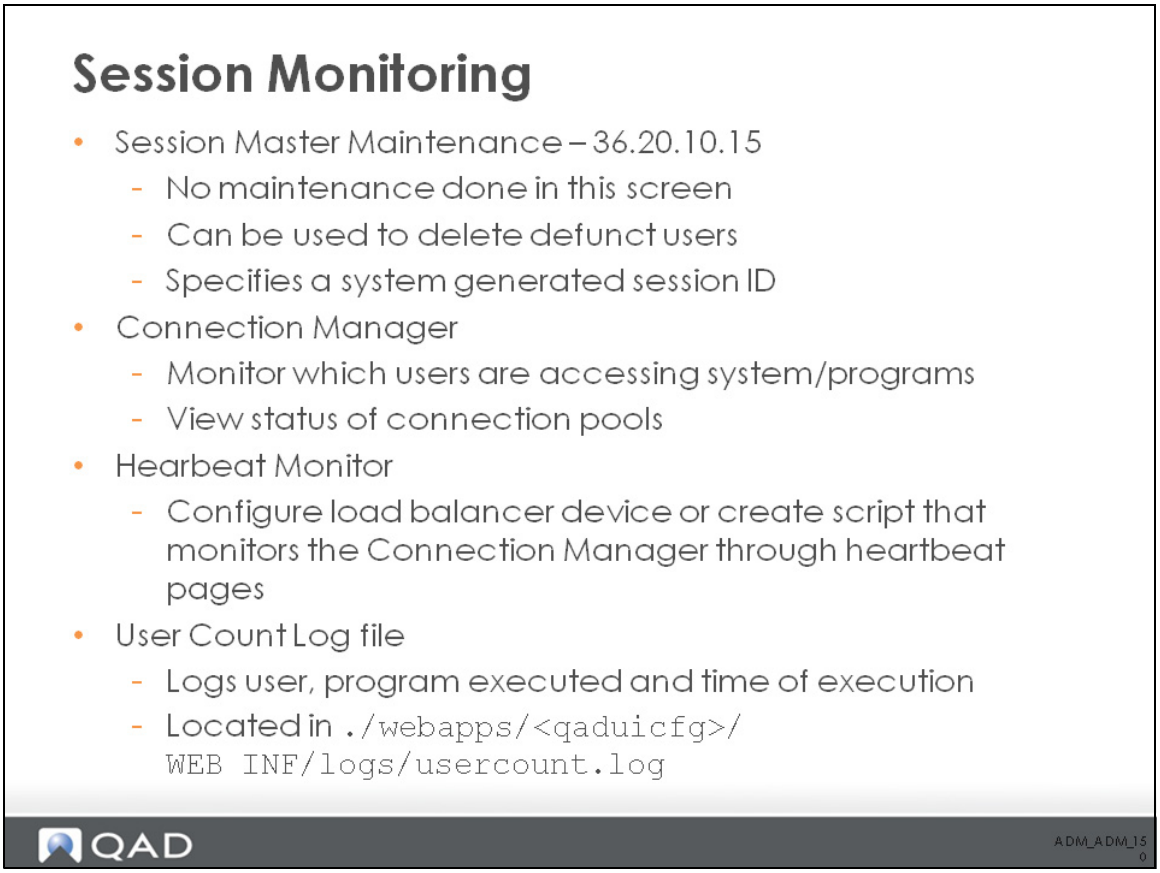


Use the Script Timeout field to enter the maximum number of seconds (between 1 and 999) the system allows for all the Telnet log-in script lines to execute.

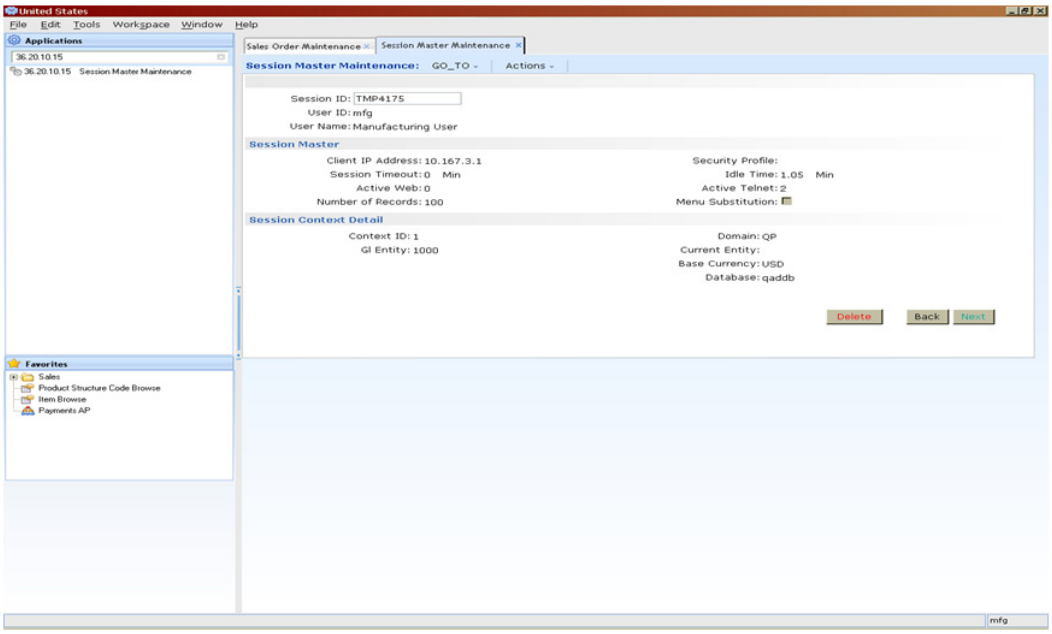
If this value is exceeded, a time-out message displays and the session closes.

The Idle Timeout value is the number of seconds (between 1-999) for which the system waits after a user successfully logs into a Telnet session and before they choose an MFG/PRO program to execute.

Session Monitoring



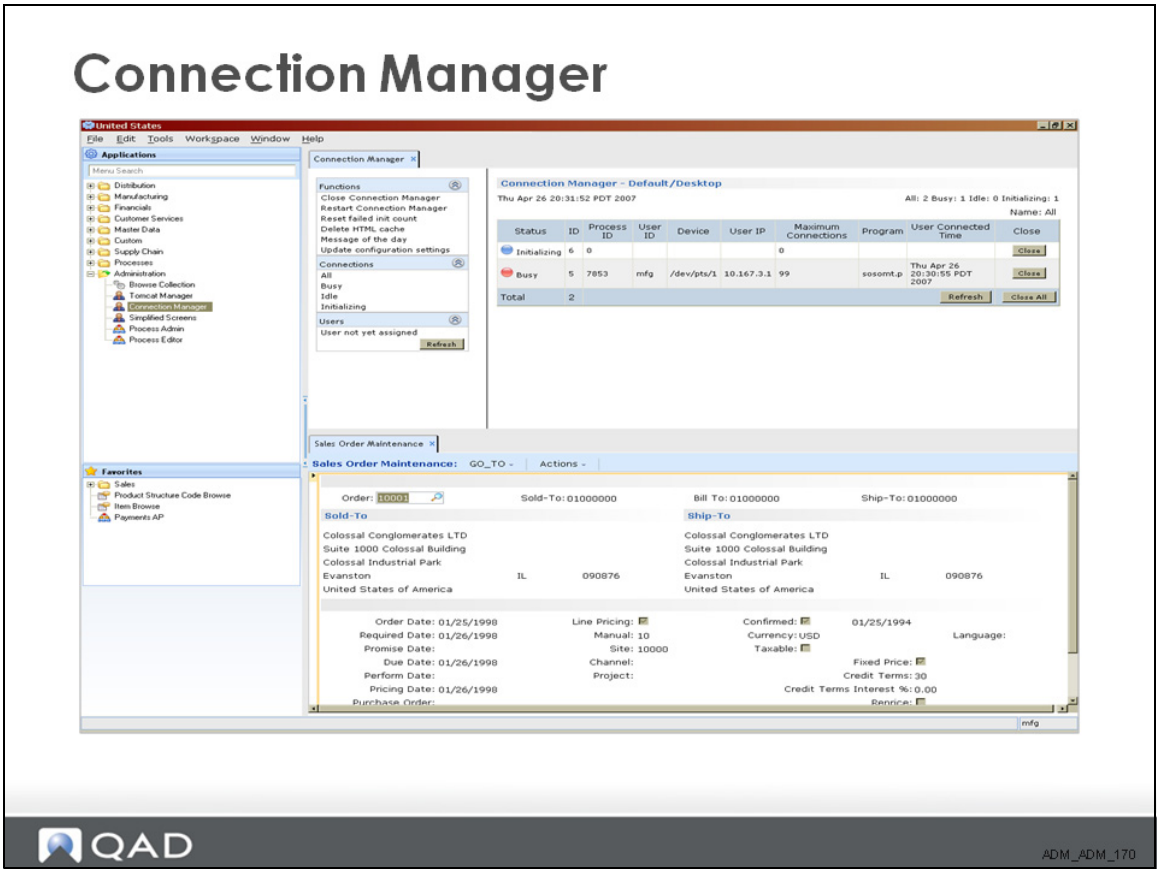
Session Master Maintenance



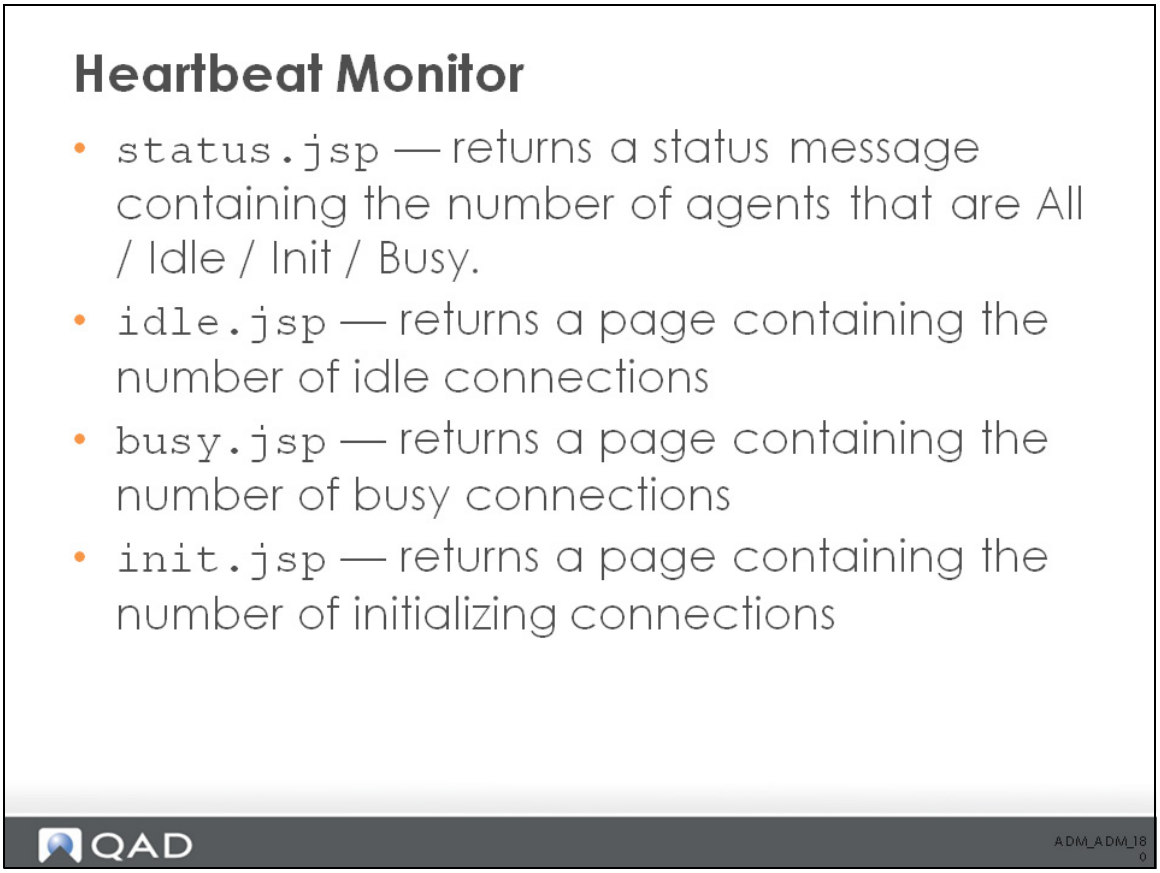
QAD

ADM_ADM_160

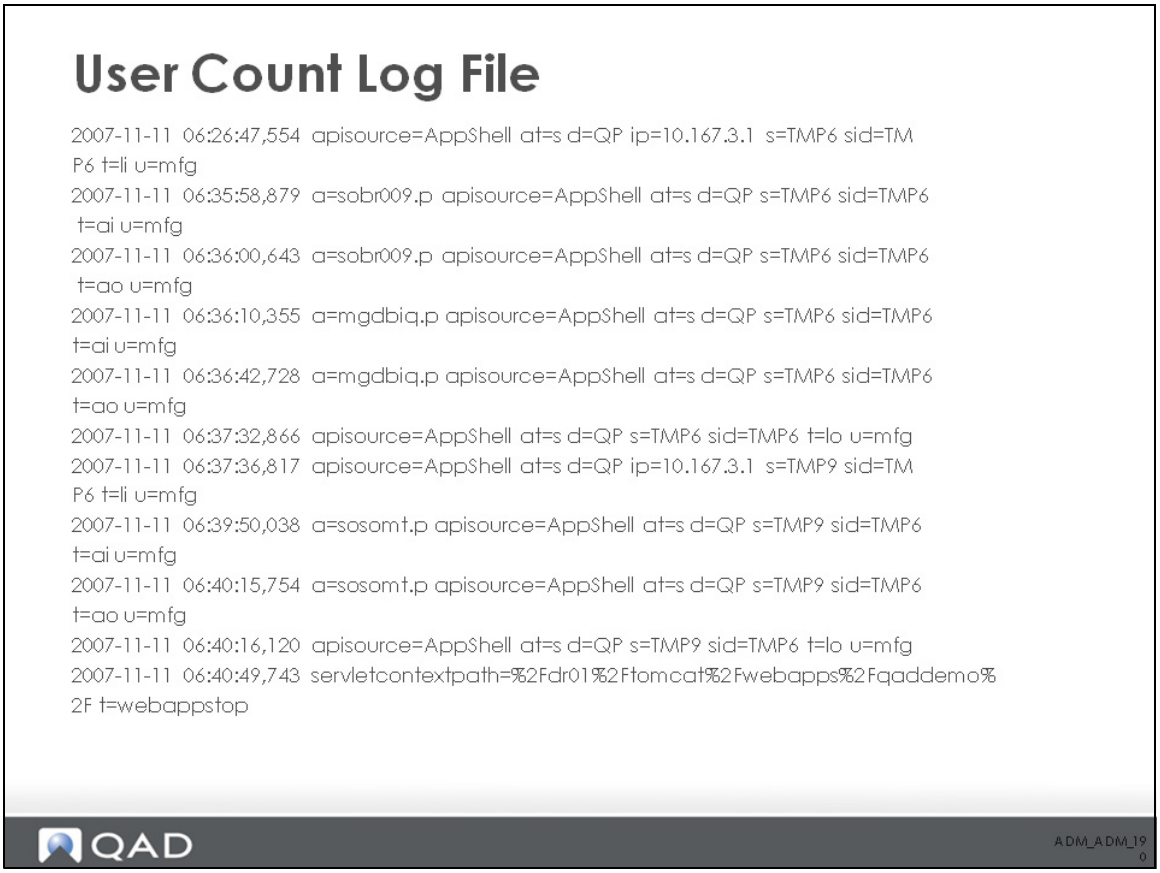
Connection Manager



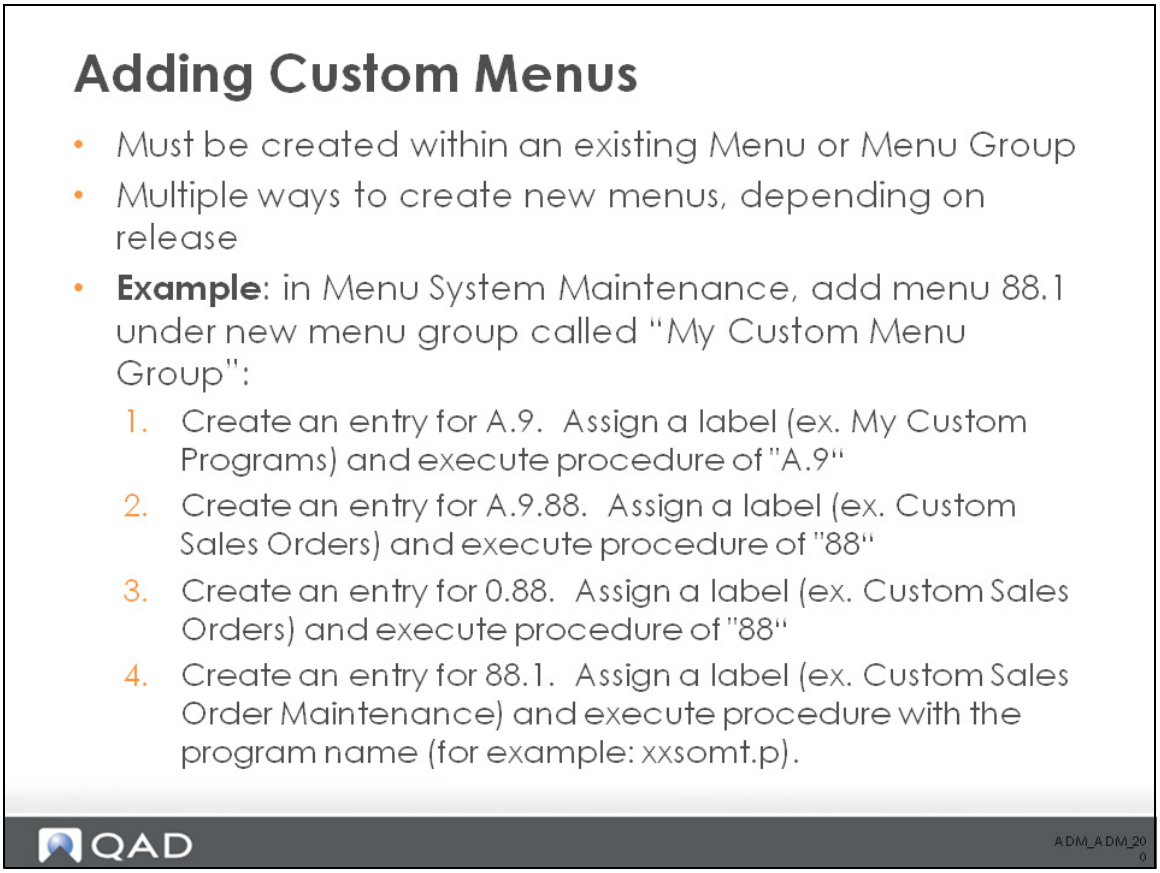
HeartBeat Monitor



User Count Log File



Adding Custom Menus



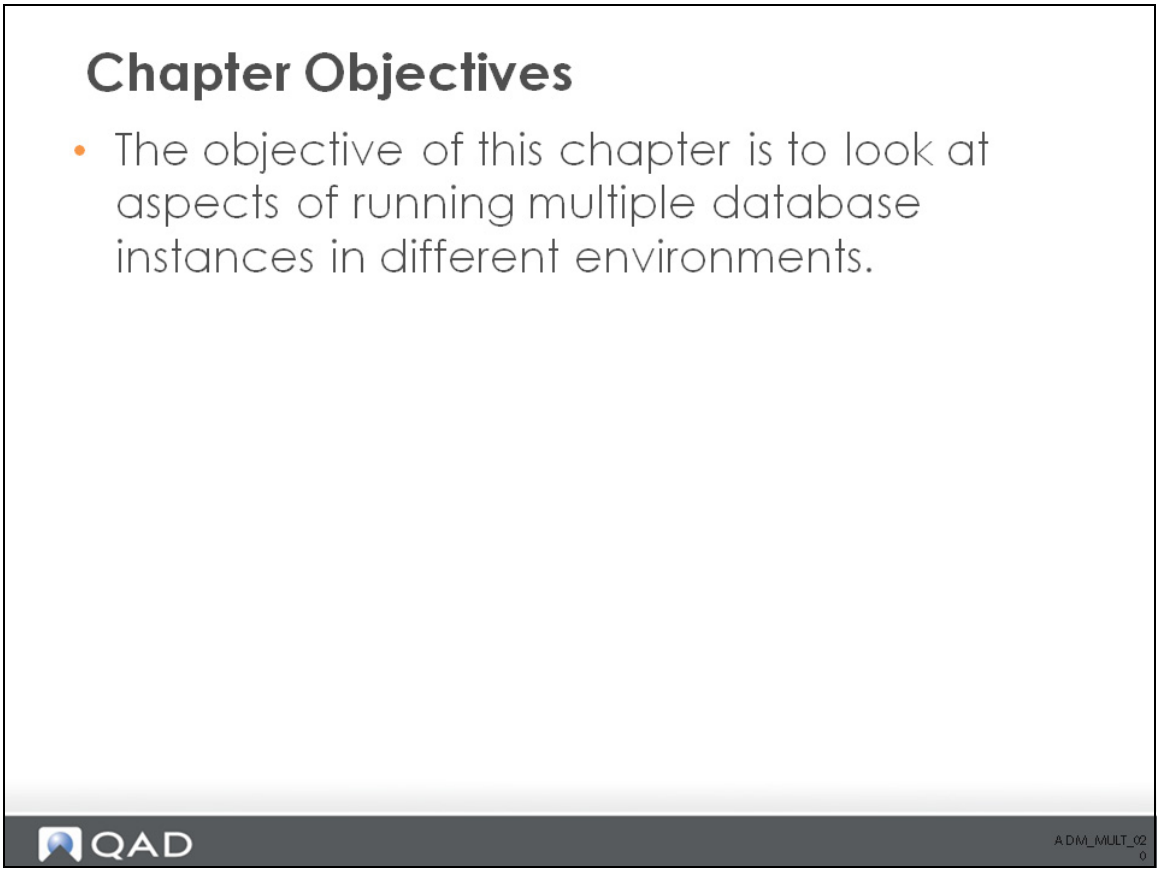
Exercises and Knowledge Check

1. What information is contained in the `client-session.xml` file?
2. You define user telnet options in which menu?
3. What settings are contained in the `client-bootstrap.xml` file?
4. What effect on user navigation does the Maximum field in User Option Telnet Maintenance have?
5. What menu do you use to delete defunct users?
6. What is the purpose of Heartbeat Monitor?

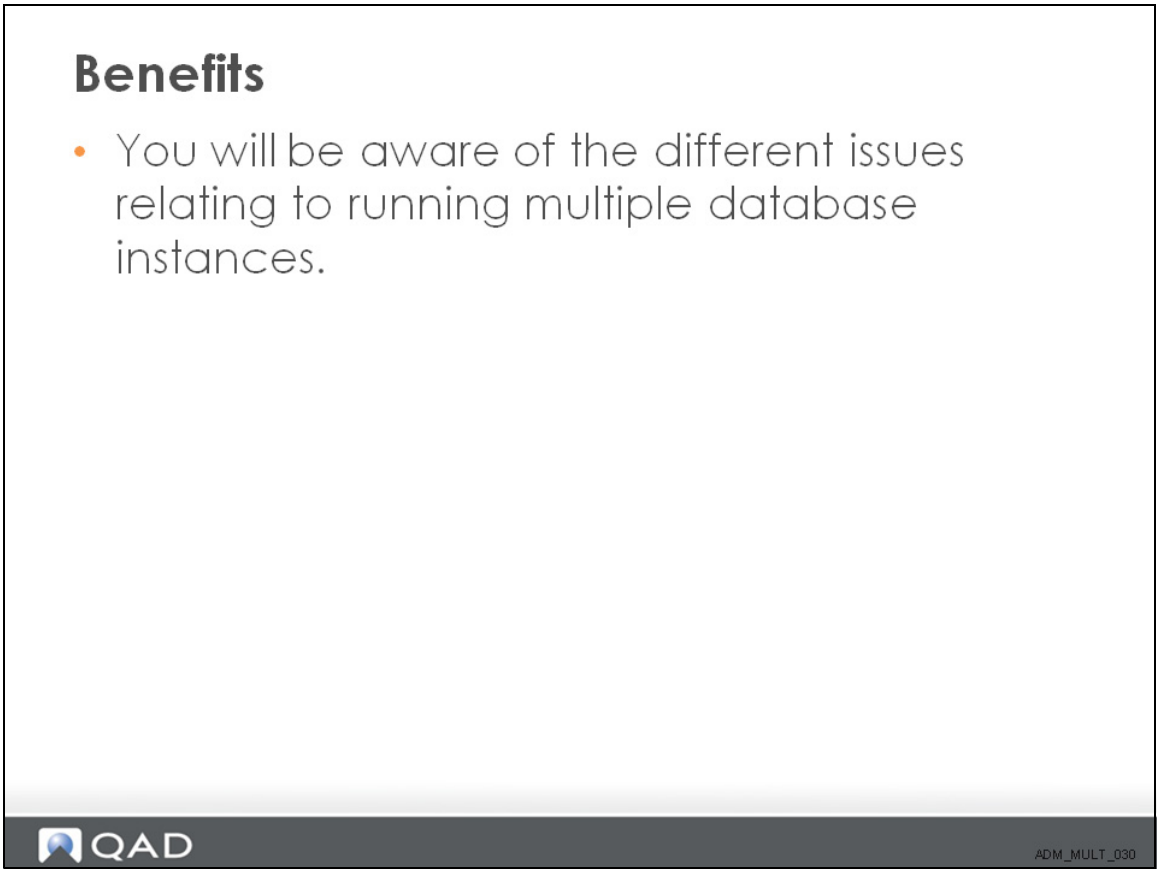
Chapter 3

Multiple Systems

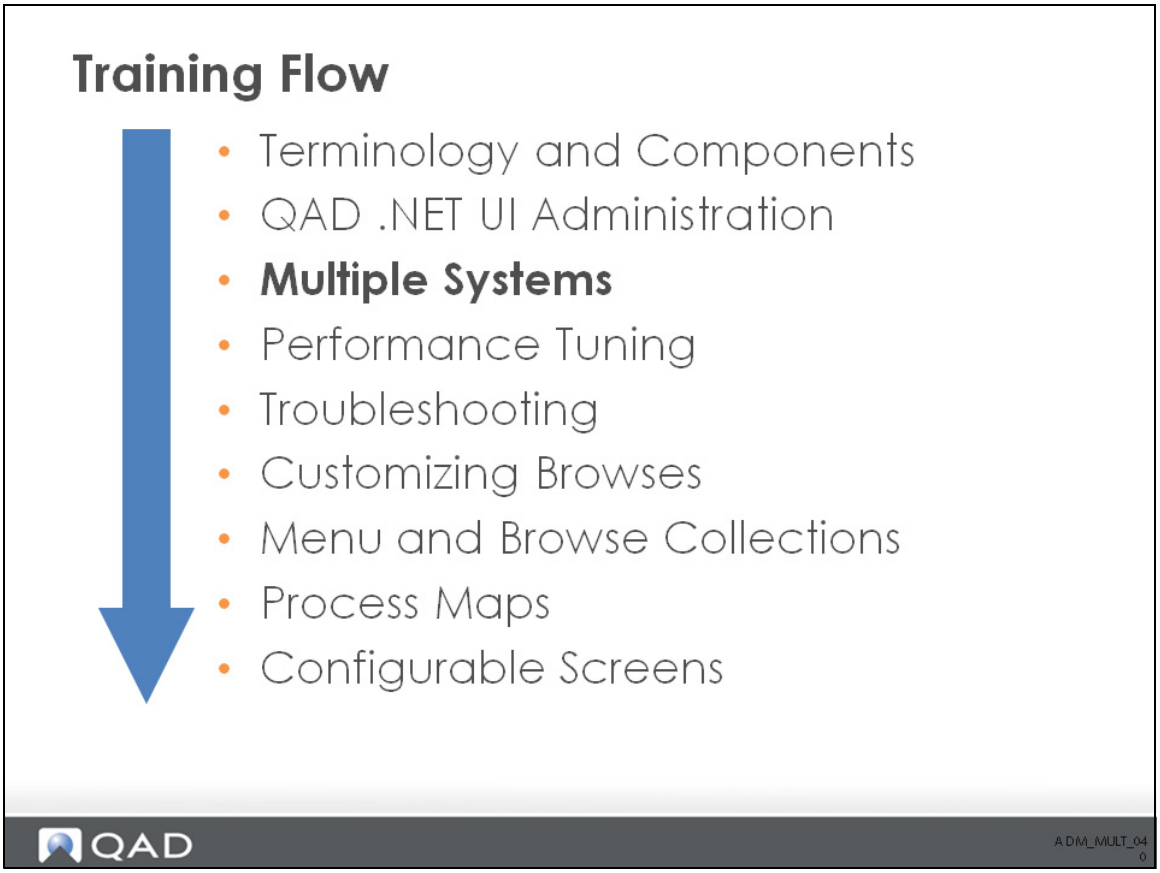
Chapter Objectives



Benefits


Benefits
• You will be aware of the different issues relating to running multiple database instances.
QAD
ADM_MULT_030

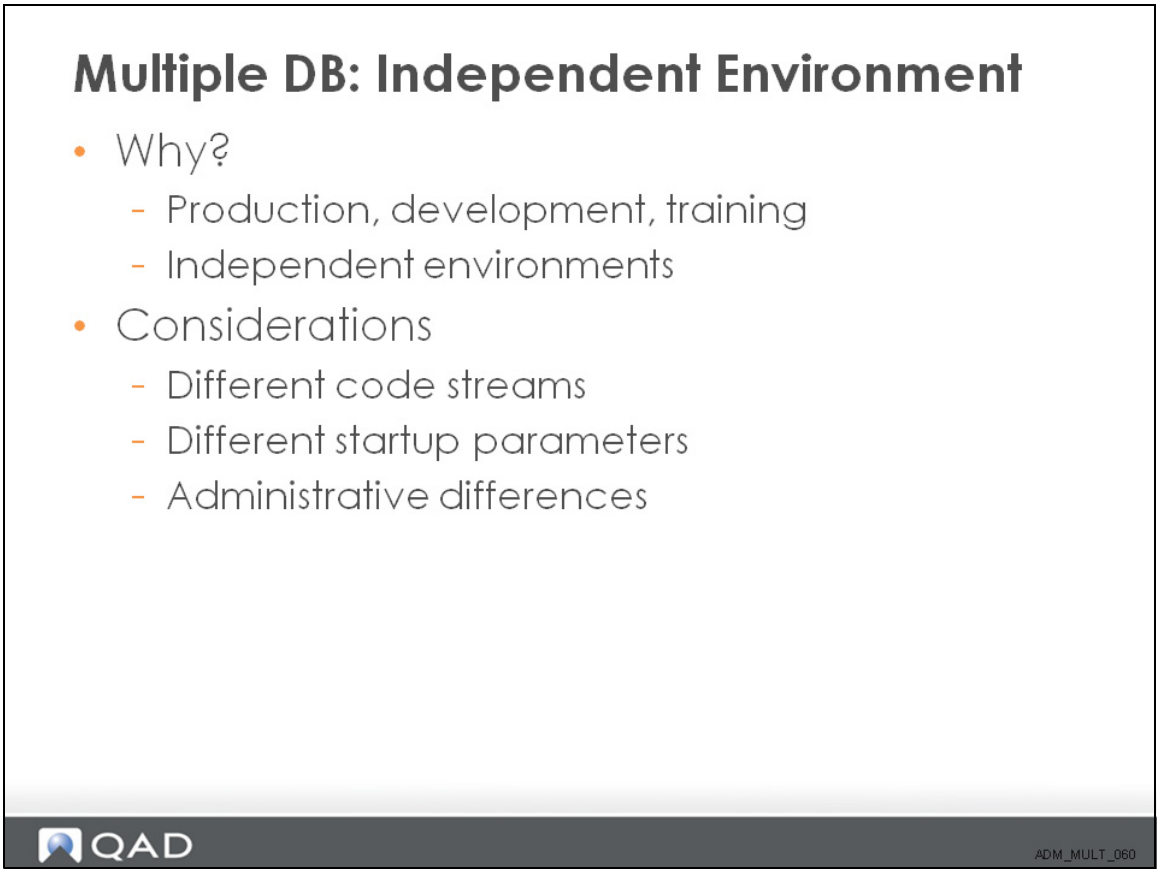
Training Flow



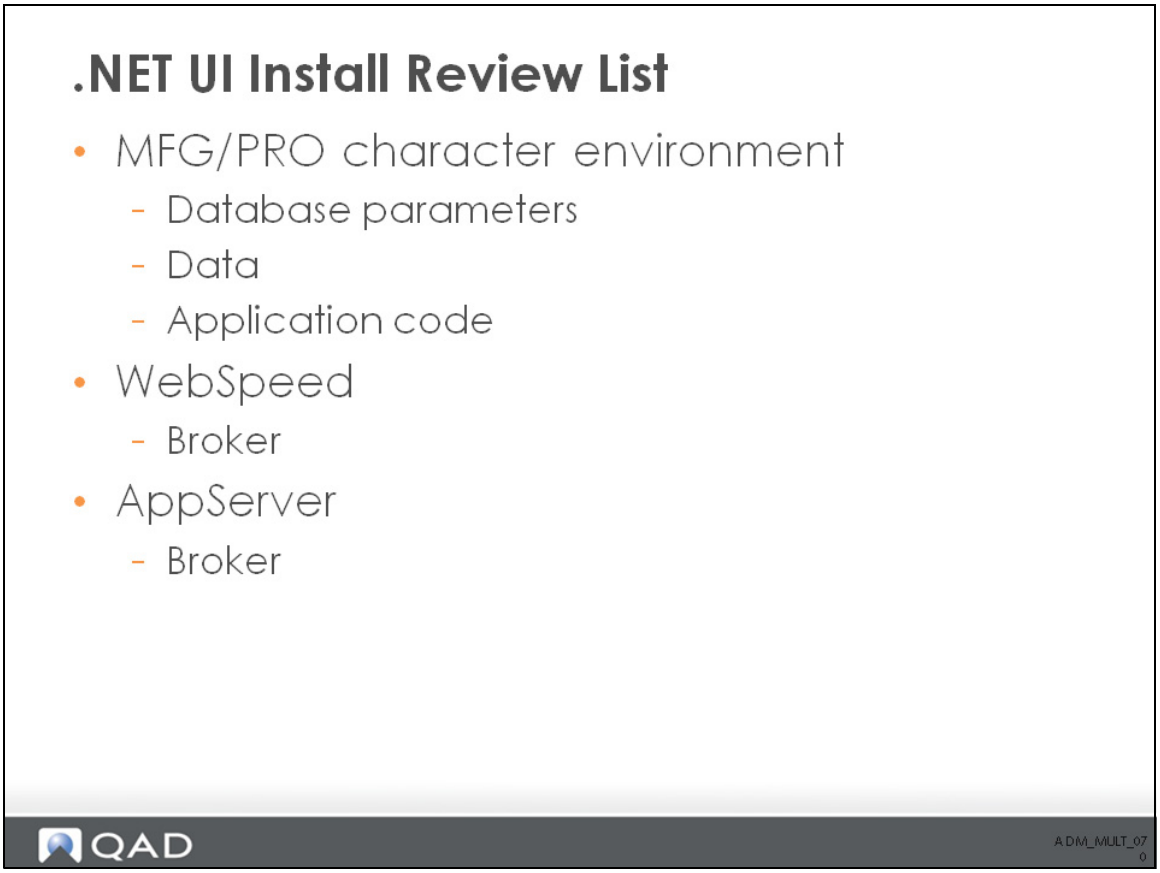
Overview

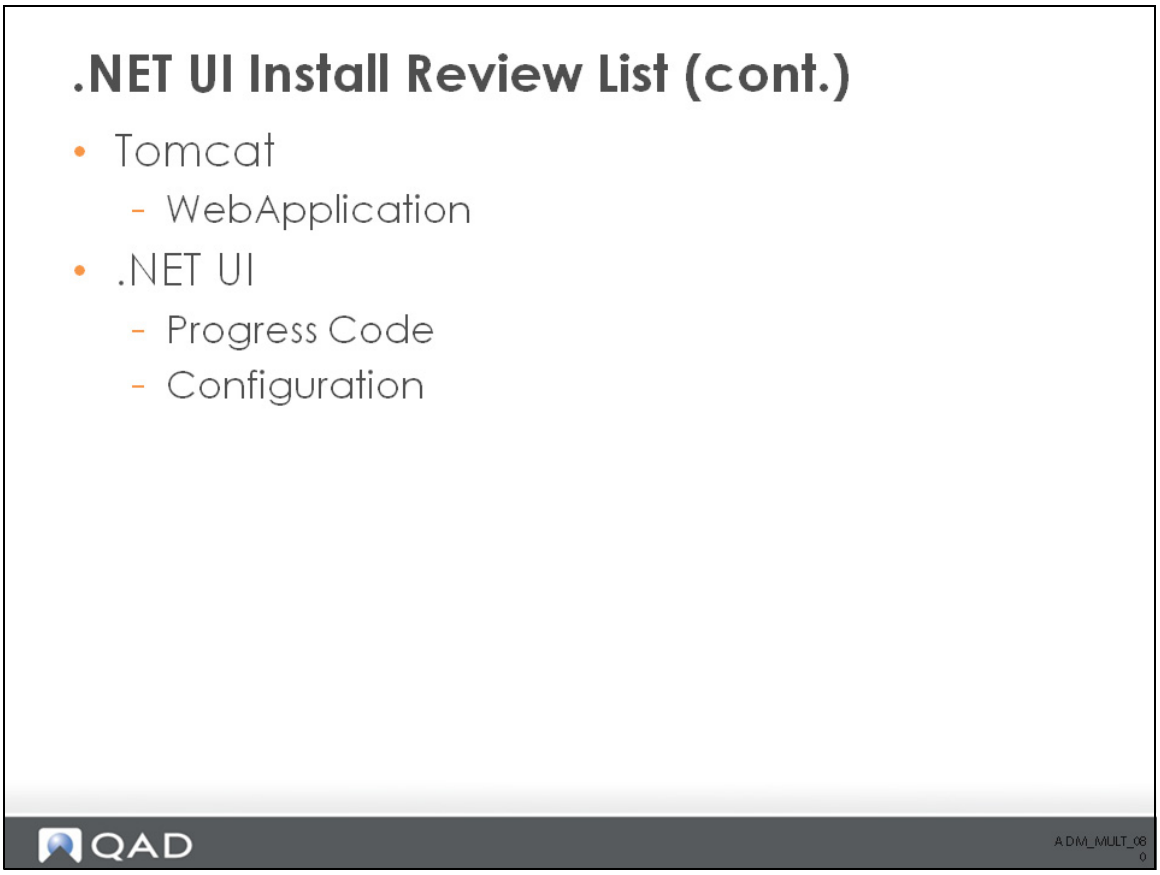

Overview
• Multiple DB: Independent Environment
• Multiple DB: Single Environment
• Multi-Language Environments
QAD
ADM_MULT_050

Multiple Databases: Independent Environment

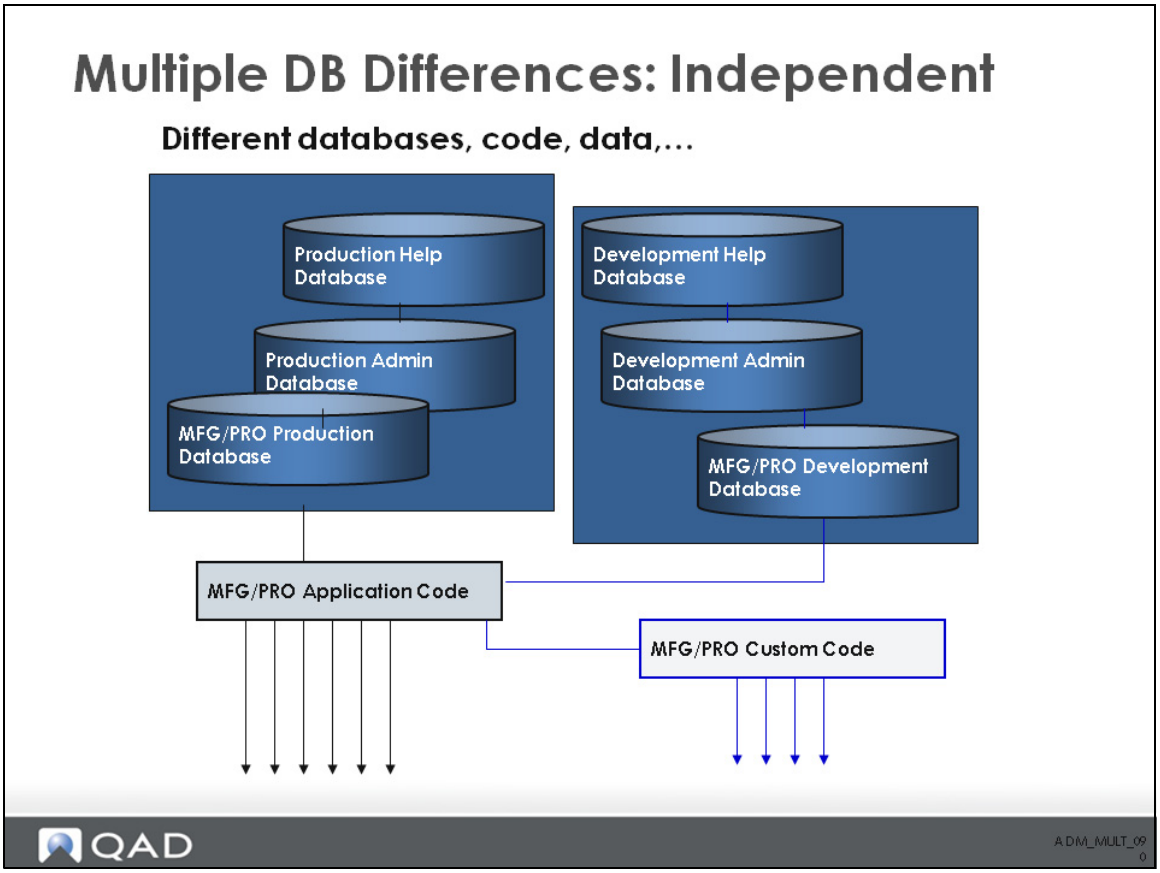


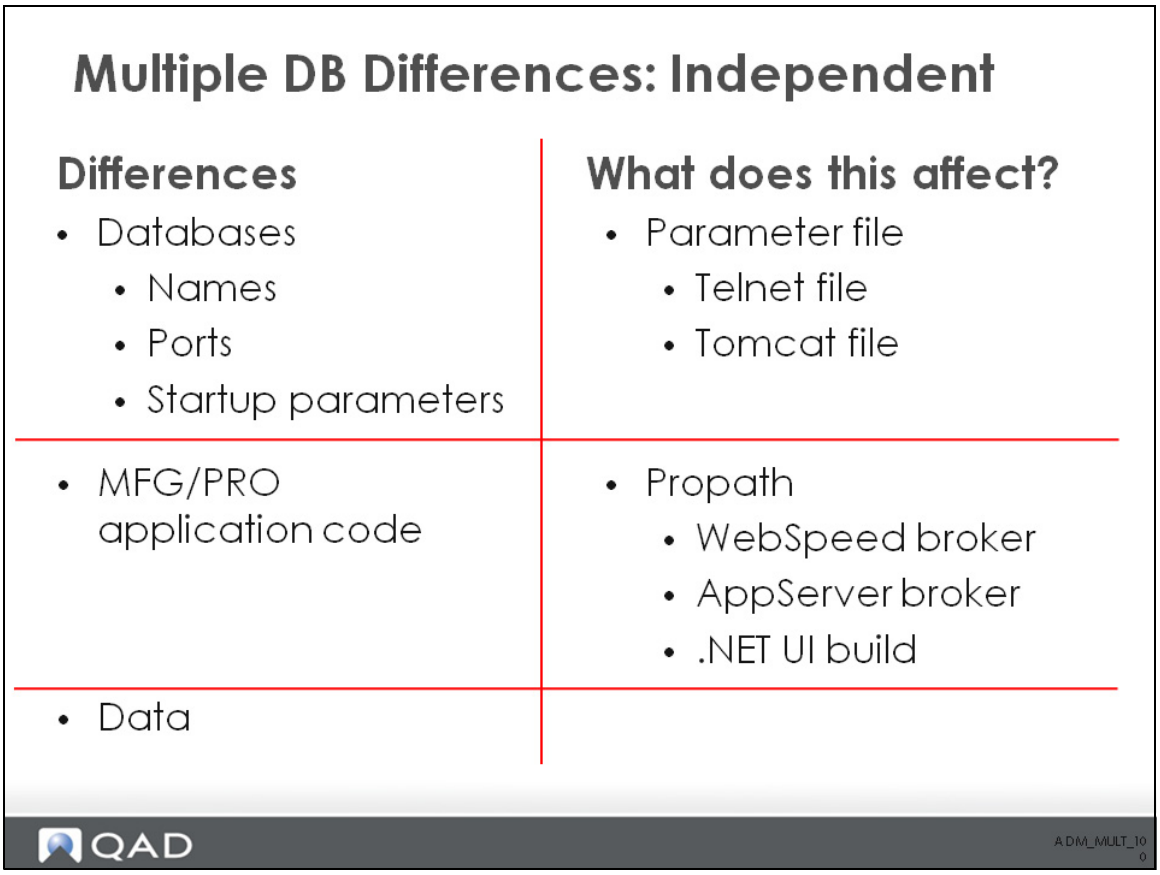
Install Review List

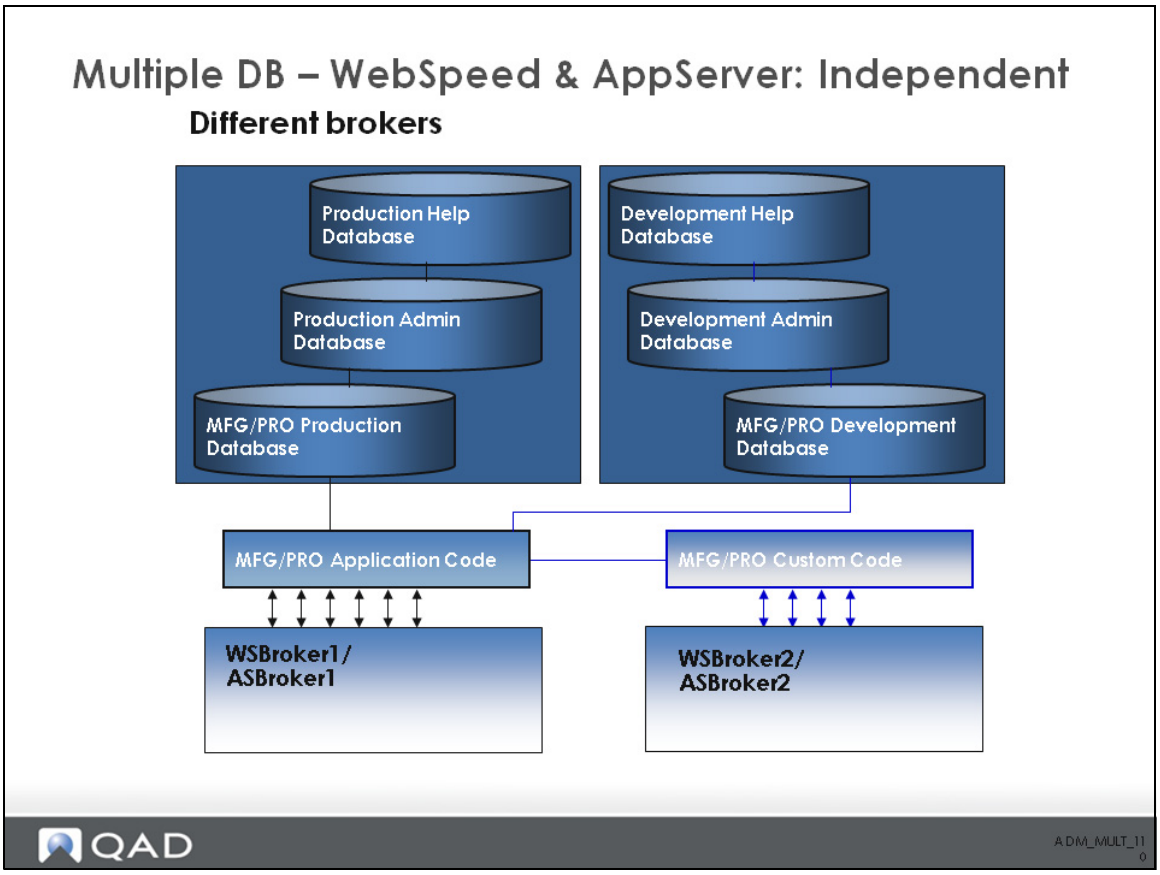


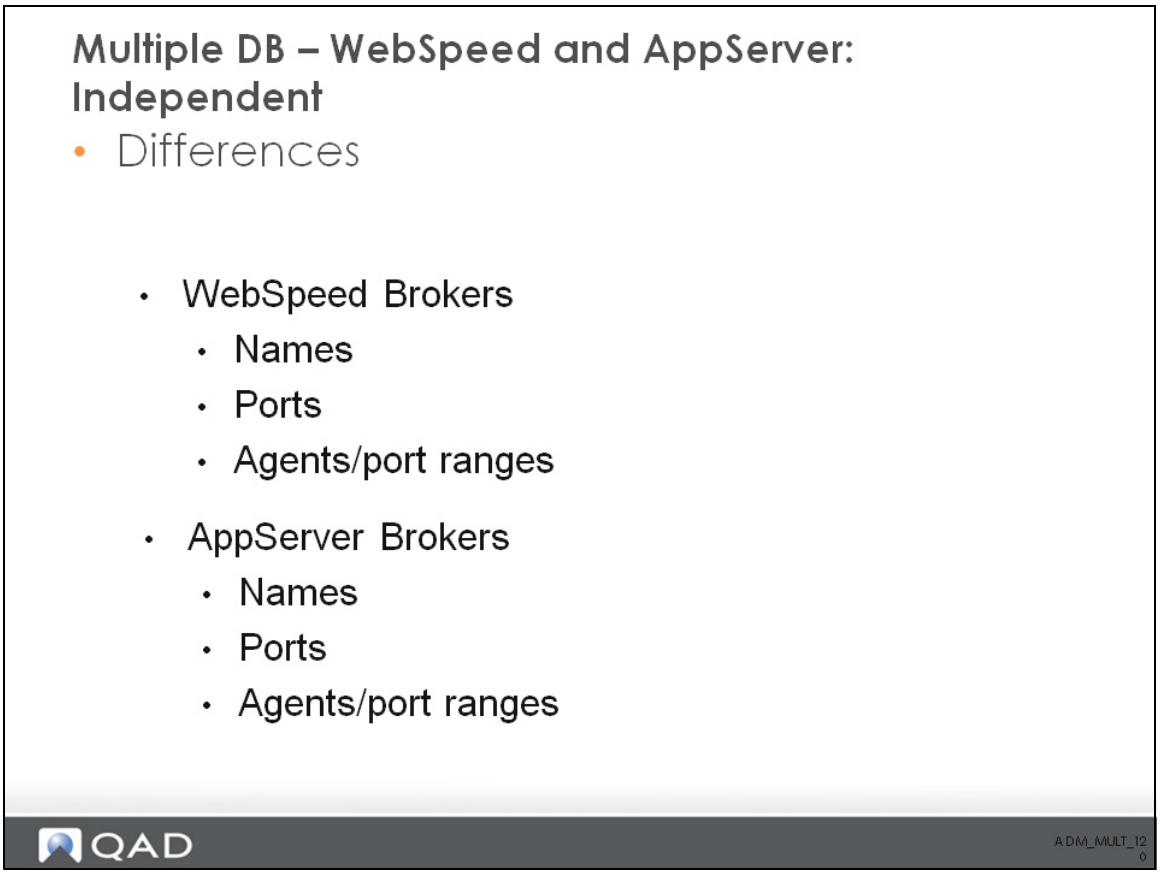

.NET UI Install Review List (cont.)
Tomcat
WebApplication
.NET UI
Progress Code
Configuration
QAD
ADM_MULT_08
0

Database Differences

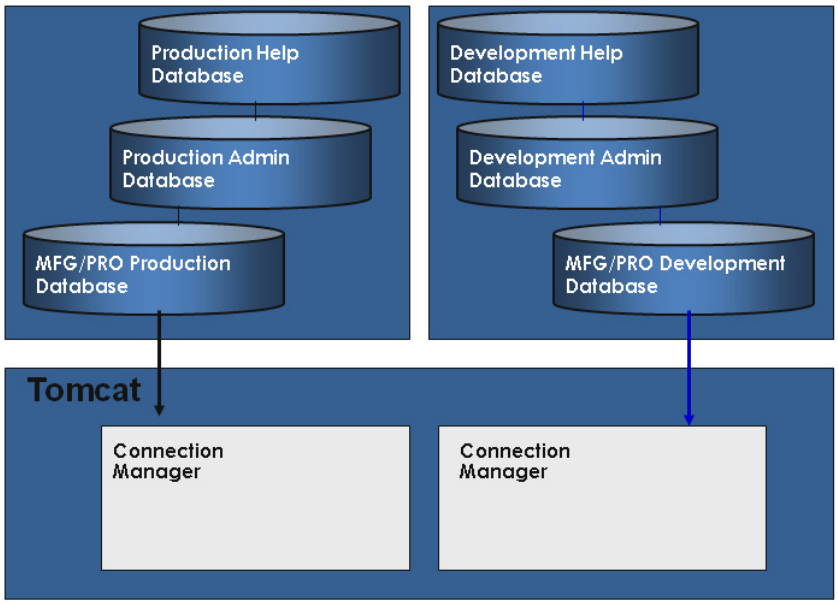



Multiple DB Differences: Independent
Differences
Databases
Names
Ports
Startup parameters
What does this affect?
Parameter file
Telnet file
Tomcat file
MFG/PRO application code
Propath
WebSpeed broker
AppServer broker
.NET UI build
Data
QAD
ADM_MULT_10


Multiple DB – WebSpeed & AppServer: Independent
Different brokers
Production Help Database
Production Admin Database
MFG/PRO Production Database
Development Help Database
Development Admin Database
MFG/PRO Development Database
MFG/PRO Application Code
MFG/PRO Custom Code
WSBroker1 / ASBroker1
WSBroker2/ ASBroker2
QAD
ADM_MULT_11_0

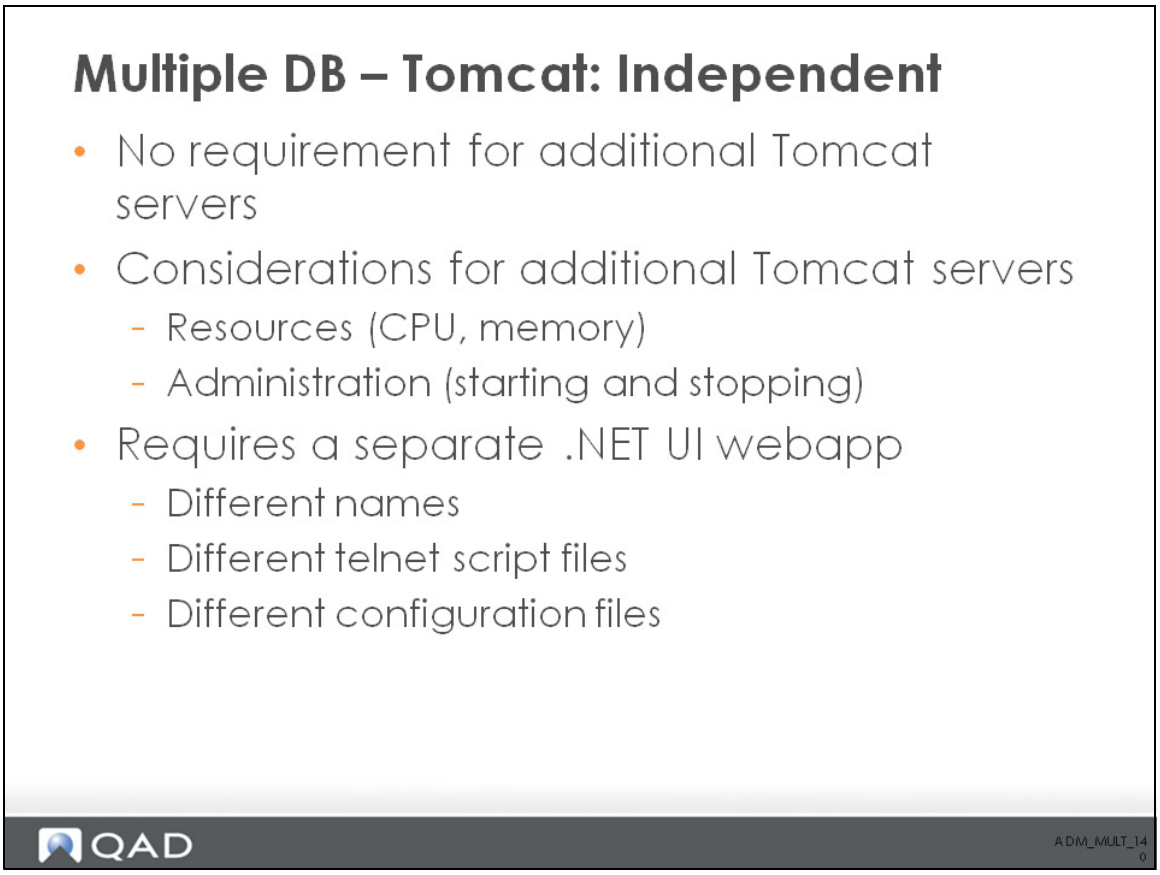

Multiple DB – WebSpeed and AppServer: Independent
Differences
WebSpeed Brokers
Names
Ports
Agents/port ranges
AppServer Brokers
Names
Ports
Agents/port ranges
QAD
ADM_MULT_12.0

Multiple DB – Tomcat: Independent

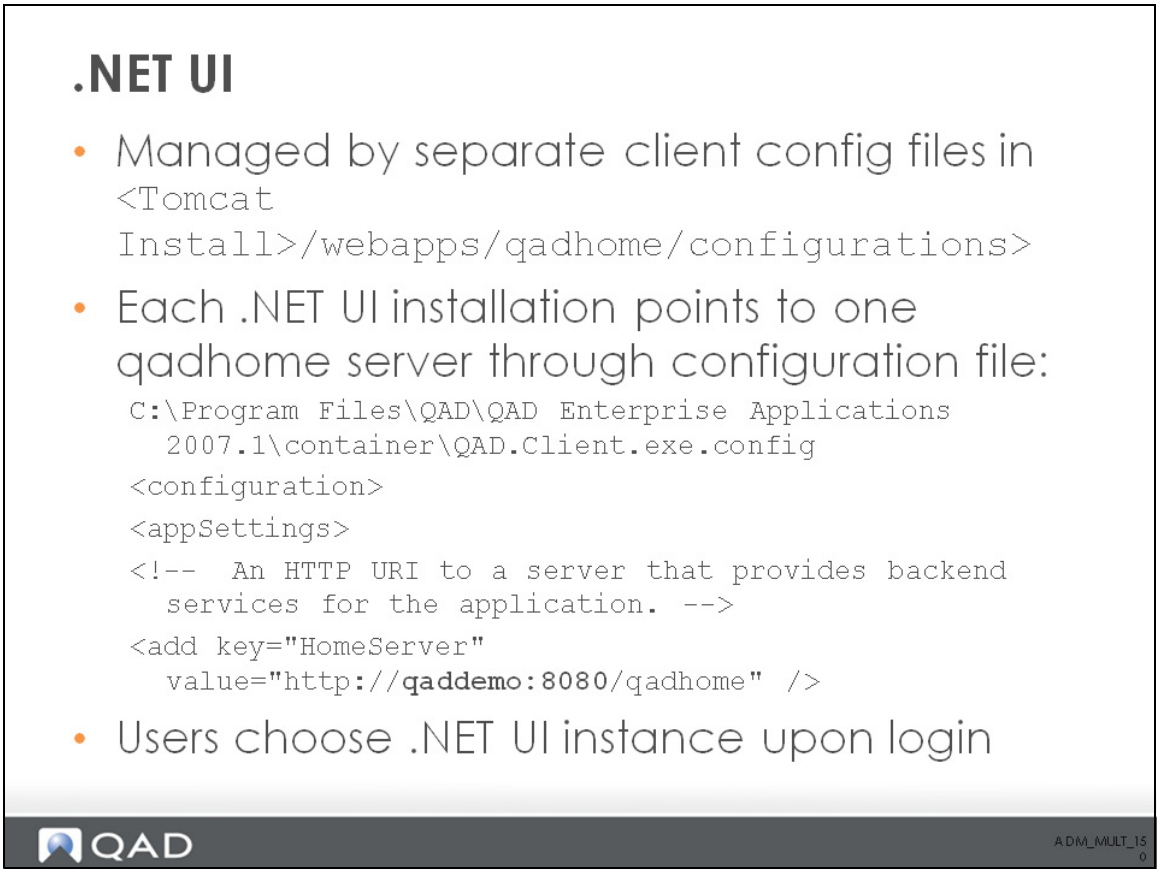


QAD

ADM_MULT_13 0


Multiple DB – Tomcat: Independent
• No requirement for additional Tomcat servers
• Considerations for additional Tomcat servers
- Resources (CPU, memory)
- Administration (starting and stopping)
• Requires a separate .NET UI webapp
- Different names
- Different telnet script files
- Different configuration files
QAD
ADM_MULT_14
0

.NET UI Considerations



.NET UI

- Possible to have multiple icons that point to multiple qadhome servers

1. Install multiple instances of .NET UI

   Example:

   C:\...\Production\QAD\...

   C:\...\Test\QAD\...

2. Configure shortcut to use batch file to replace configuration file corresponding to desired environment prior to launching

   Example:

   The Production icon batch file will copy `Production.QAD.Client.exe.config` to `QAD.Client.exe.config`

QAD

ADM_MULT_I6 0

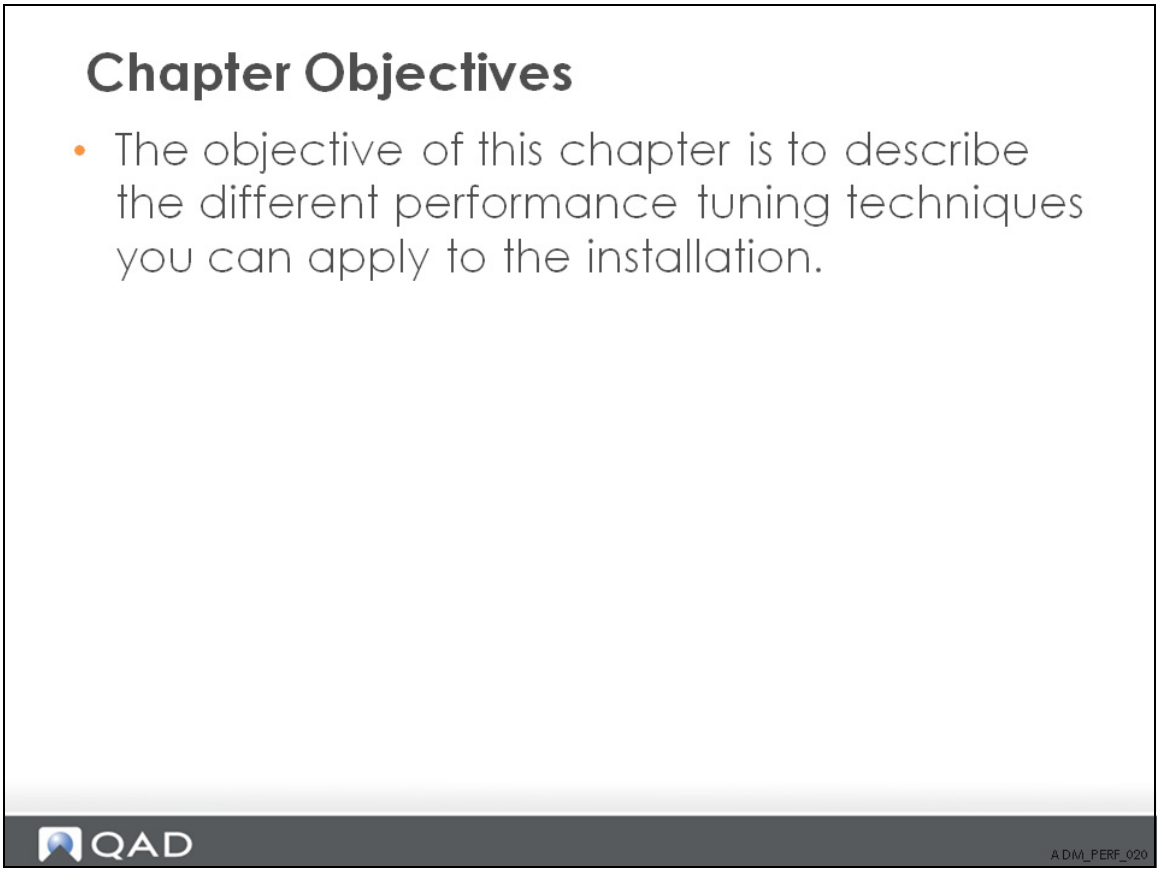
Exercises and Knowledge Check

1 Consider and list the setup and configuration issues involved in running a multiple database .NET UI environment.

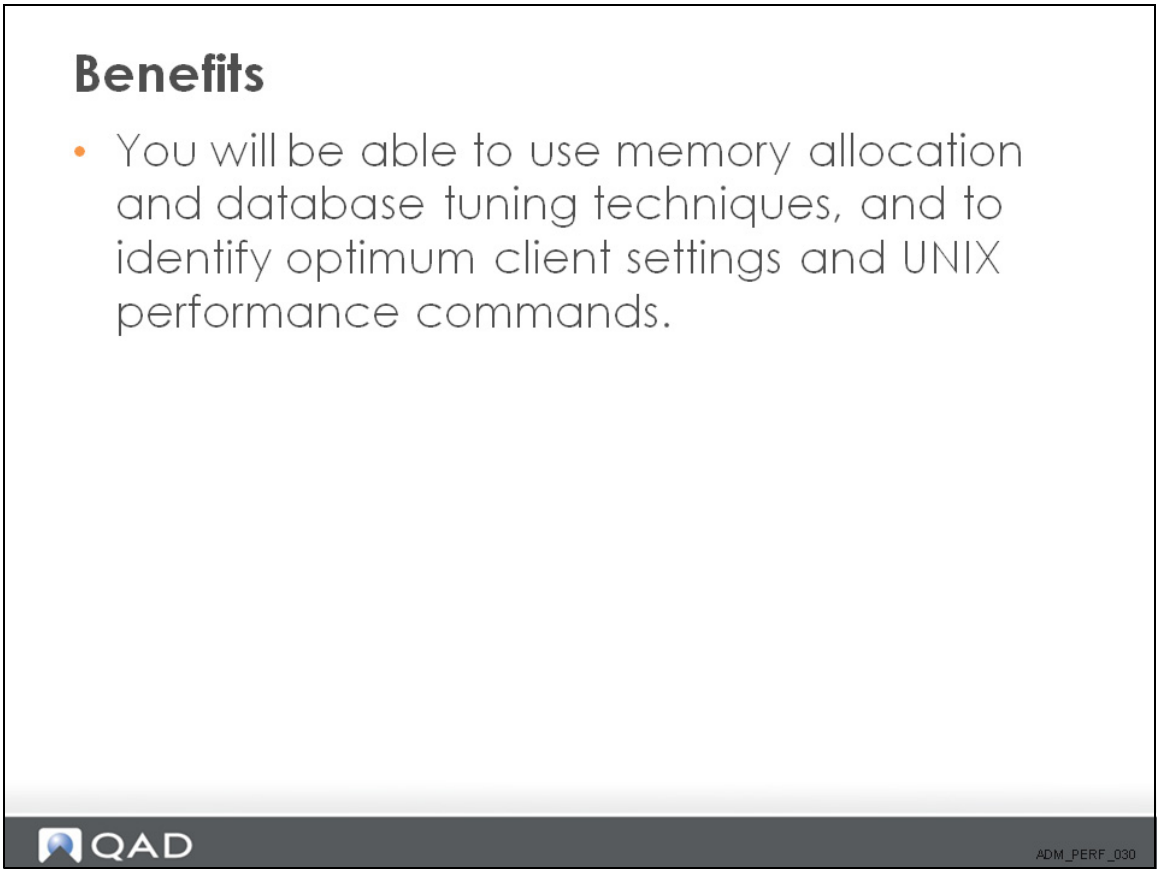
Chapter 4

Performance Tuning

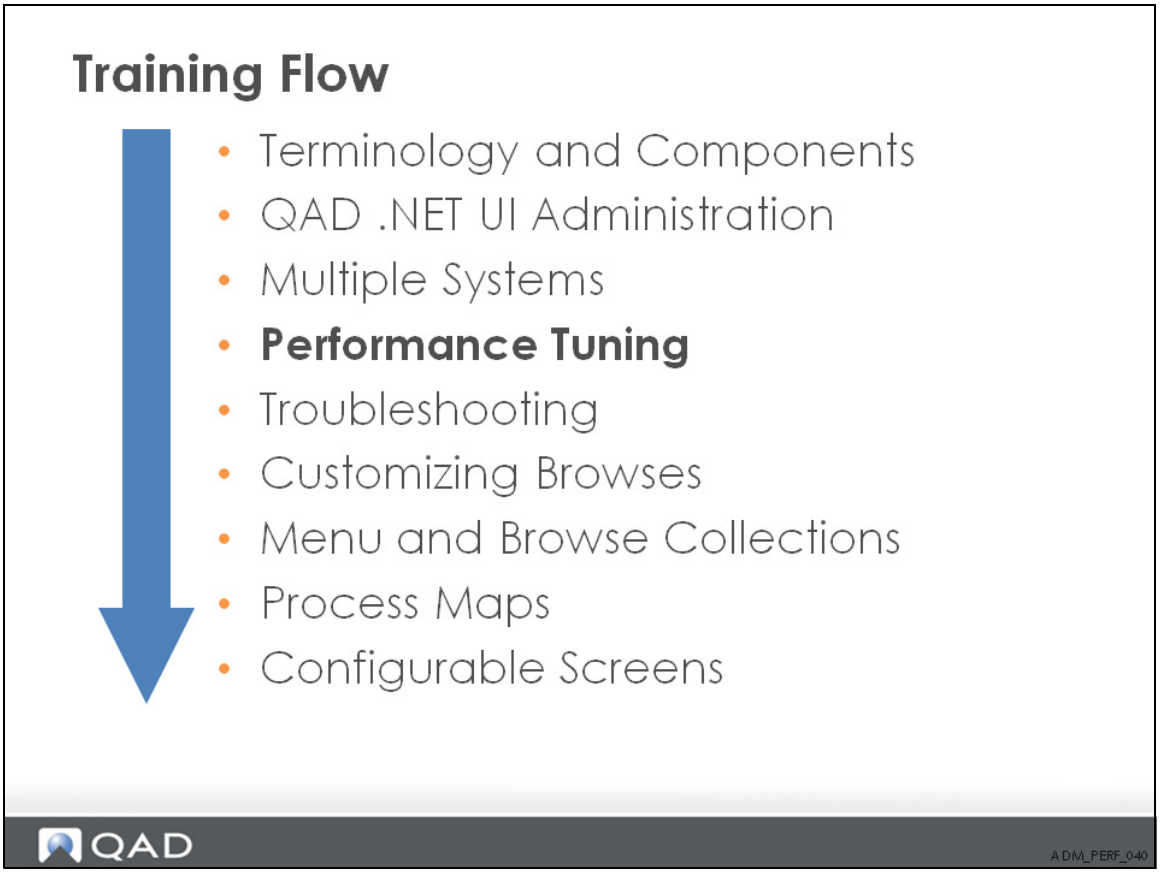
Chapter Objectives



Benefits


Benefits
• You will be able to use memory allocation and database tuning techniques, and to identify optimum client settings and UNIX performance commands.
QAD
ADM_PERF_030

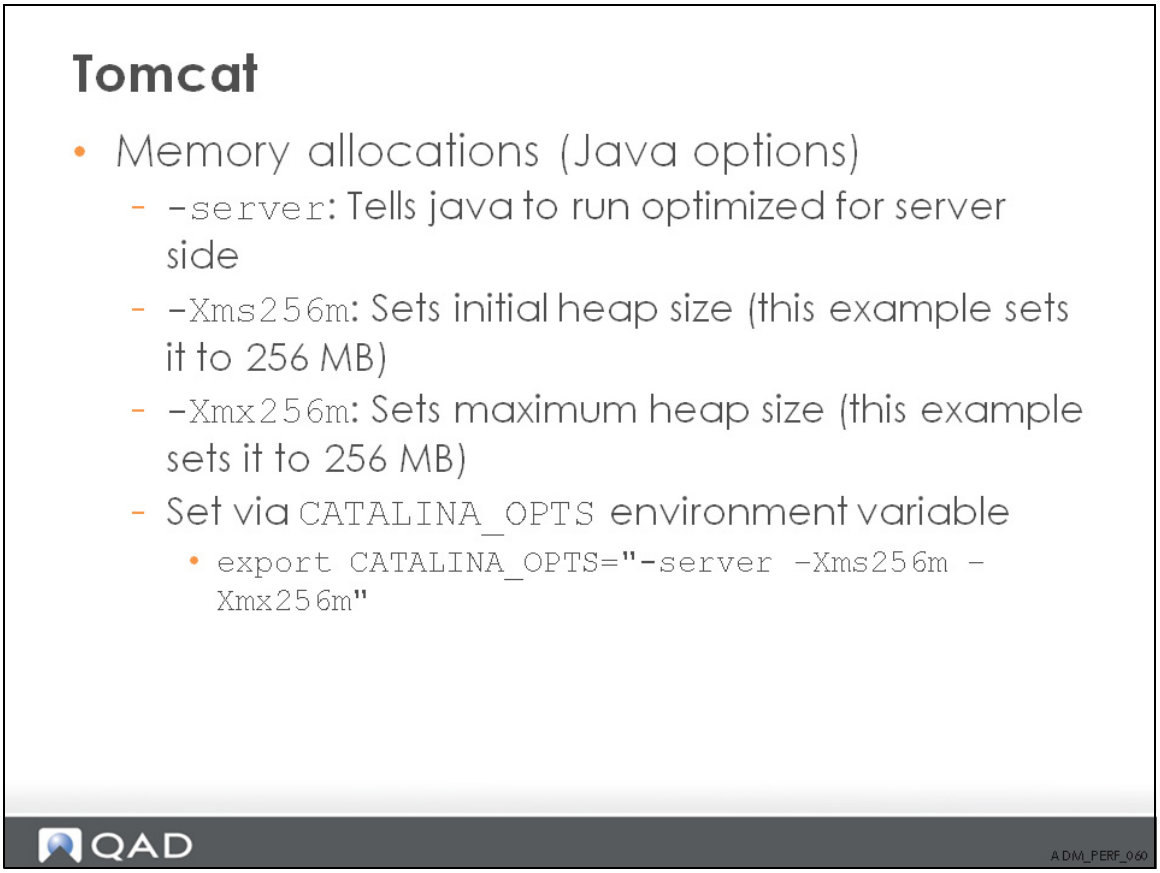
Training Flow



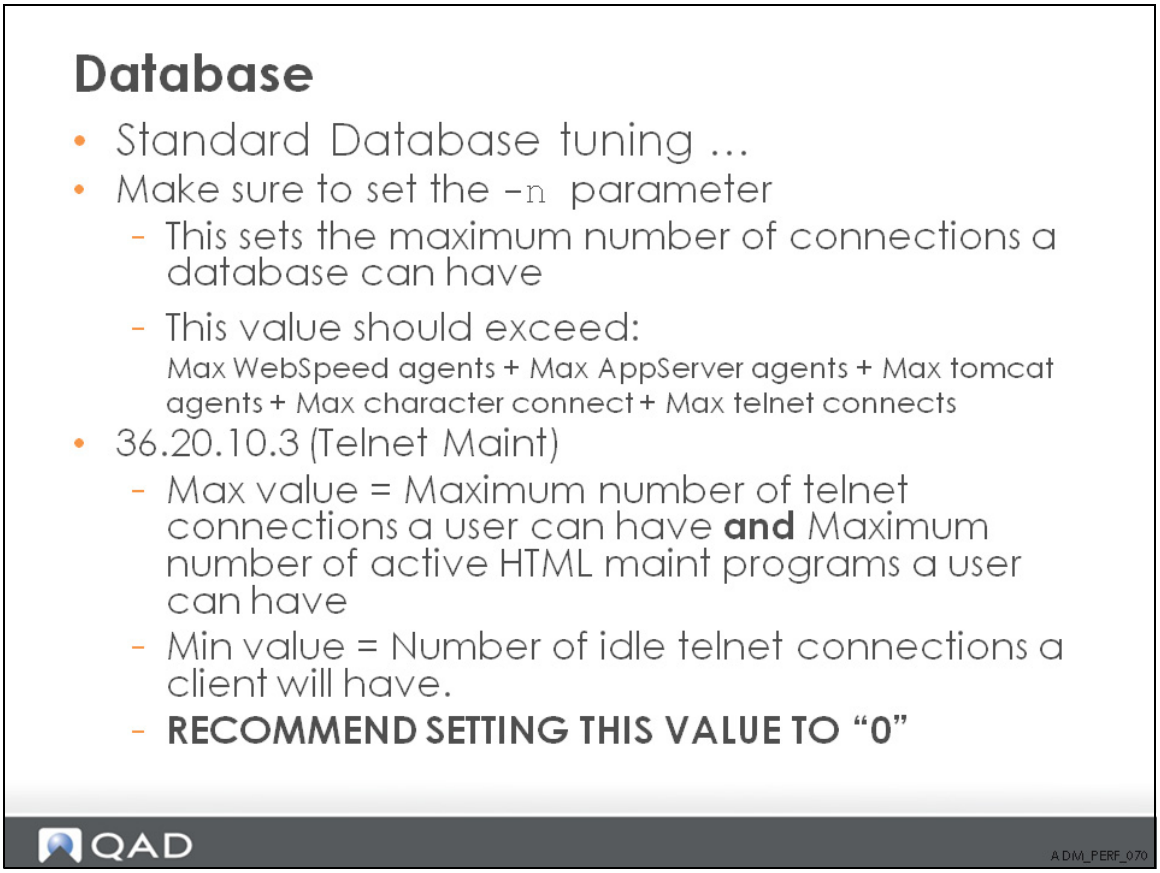
Overview


Overview
Tomcat considerations
Database
Clients
UNIX tools
Kernel considerations
QAD
ADM_PERF_050

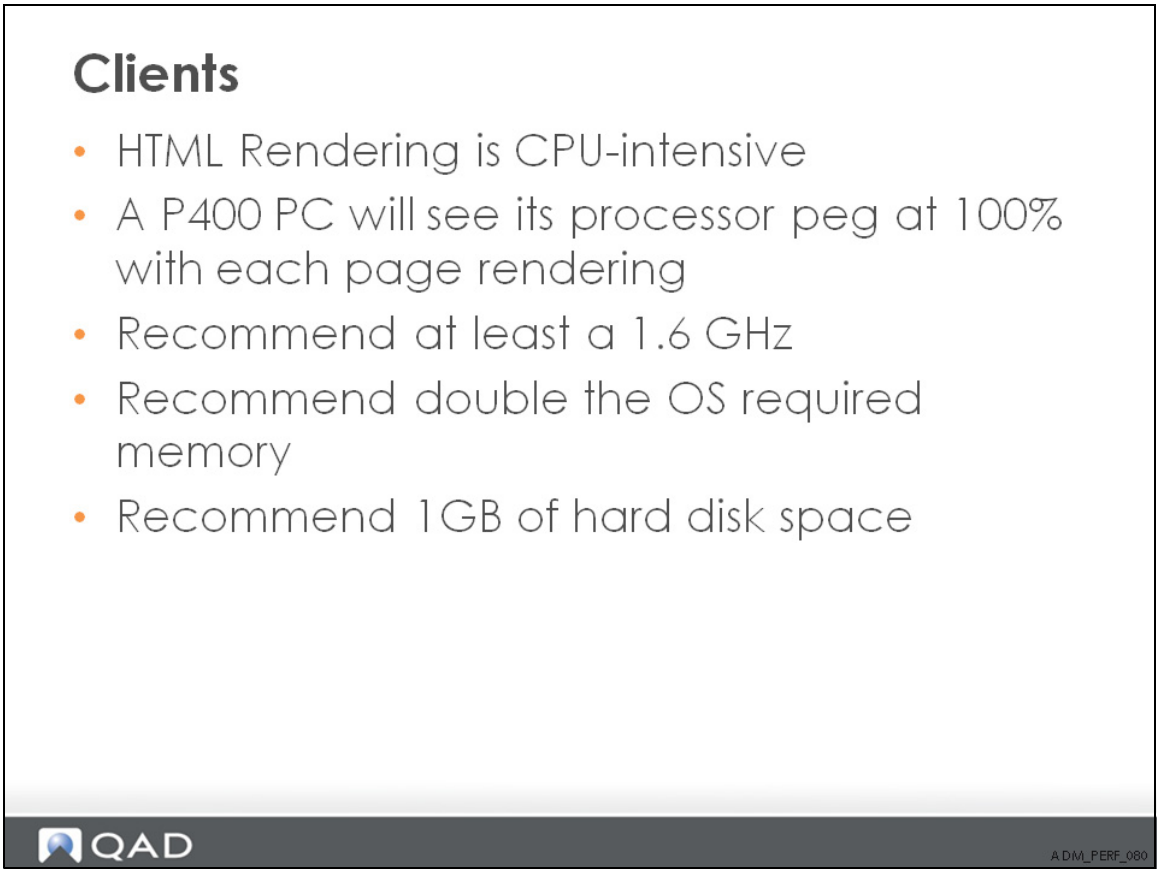
Tomcat Memory Allocations



Database Tuning



Client Considerations



UNIX Tools

UNIX Tools

- Top

root@coli22:/dr01/mfgpro/tomcat-8080/bin

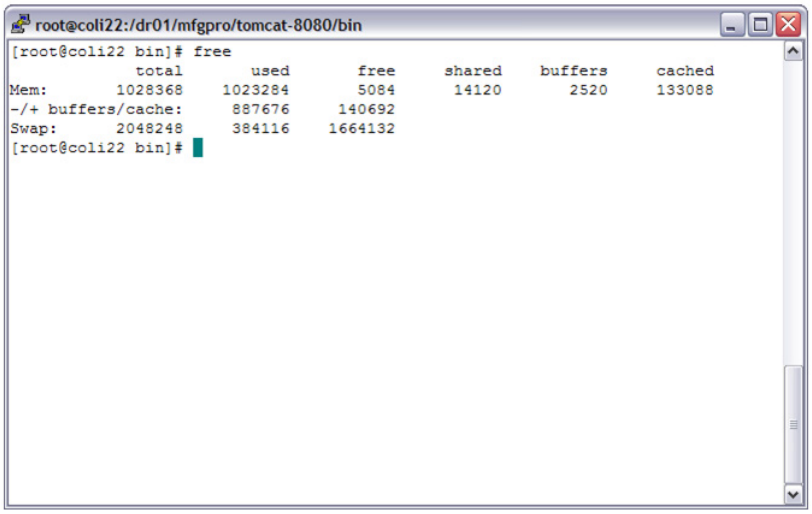
```
 12:35pm  up 75 days, 21:52, 45 users,  load average: 1.99, 1.91, 1.71
794 processes: 792 sleeping, 2 running, 0 zombie, 0 stopped
CPU0 states:  7.2% user, 48.1% system,  0.0% nice, 43.1% idle
CPU1 states:  9.1% user, 32.0% system,  0.0% nice, 58.0% idle
Mem:  1028368K av, 1023272K used,    5096K free,   14120K shrd,    3752K buff
Swap: 2048248K av,  384116K used, 1664132K free                  140584K cached

  PID USER     PRI  NI  SIZE  RSS SHARE STAT %CPU %MEM   TIME COMMAND
 9815 root      17   0  1944 1940   956 R    60.5  0.1   0:03 top
10642 nobody    11   0 26992  25M   496 S    12.4  2.5 450:01 smbd
26579 root       9   0 10856  10M  1844 D    10.1  1.0  62:48 smbd
31110 root       9   0 14364 4932  1572 S     3.5  0.4  13:16 java
 1807 root       9   0 10628 8756  7756 S     1.5  0.8   5:36 _progres
26740 root      10   0  202M 139M 60032 S     1.5 13.8   0:37 java
 3175 named      9   0 44212  40M 36888 S     0.7  4.0  98:38 named
22803 nobody     9   0 27256  26M  2728 S     0.7  2.6  30:27 smbd
 9812 root       9   0  2056 2056  1476 S     0.3  0.1   0:00 vim
    1 root       8   0   120   72    72 S     0.0  0.0   0:08 init
    2 root       9   0     0    0     0 SW    0.0  0.0   0:00 keventd
    3 root      19  19     0    0     0 SWN   0.0  0.0   0:05 ksoftirqd_CPU0
    4 root      19  19     0    0     0 SWN   0.0  0.0   0:06 ksoftirqd_CPU1
    5 root       9   0     0    0     0 SW    0.0  0.0  18:44 kswapd
    6 root       9   0     0    0     0 SW    0.0  0.0   5:30 kreclaimd
    7 root       9   0     0    0     0 SW    0.0  0.0   0:51 bdflush
```

QAD

ADM_PERF_090

UNIX Tools

- Check memory with free



QAD

ADM_PERF_100

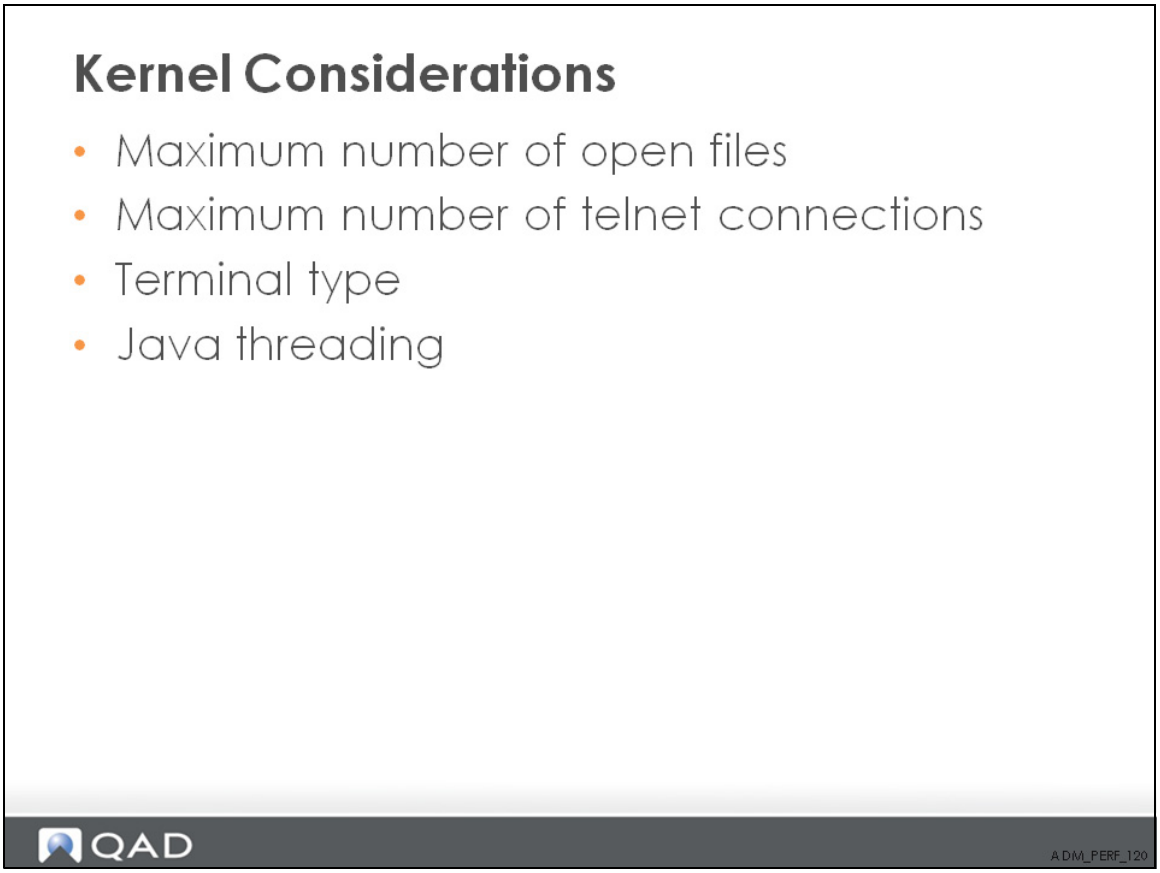
Other UNIX Tools

- `lsof`
  - Lists open files on system
  - A way of tracking down process associated with a port
- `ipcs`: Provides information on ipc facilities
- `who`: Shows who is logged into system
- `ps -elf`
  - Shows active processes
  - Will want to redirect to file for viewing
  - Will want to pipe it to a `grep` command for filtering

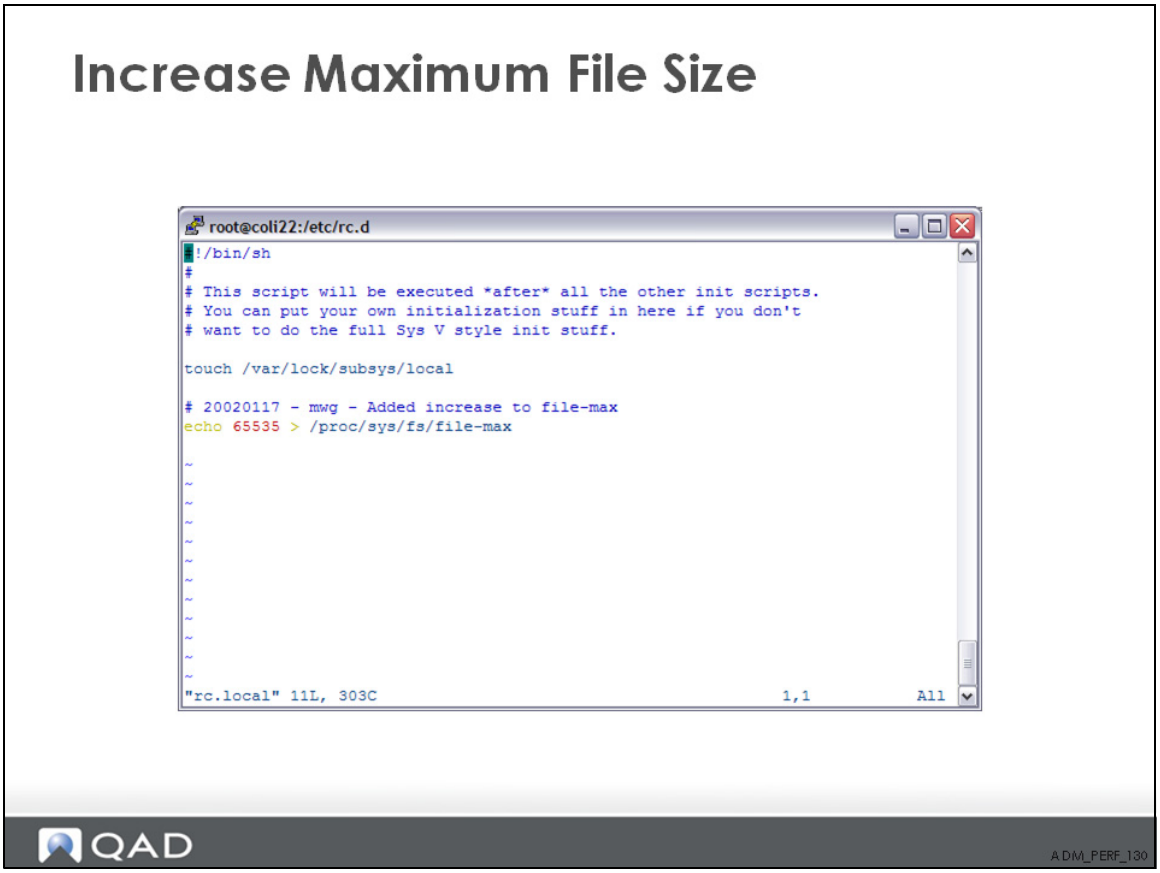
QAD

ADM_PERF_110

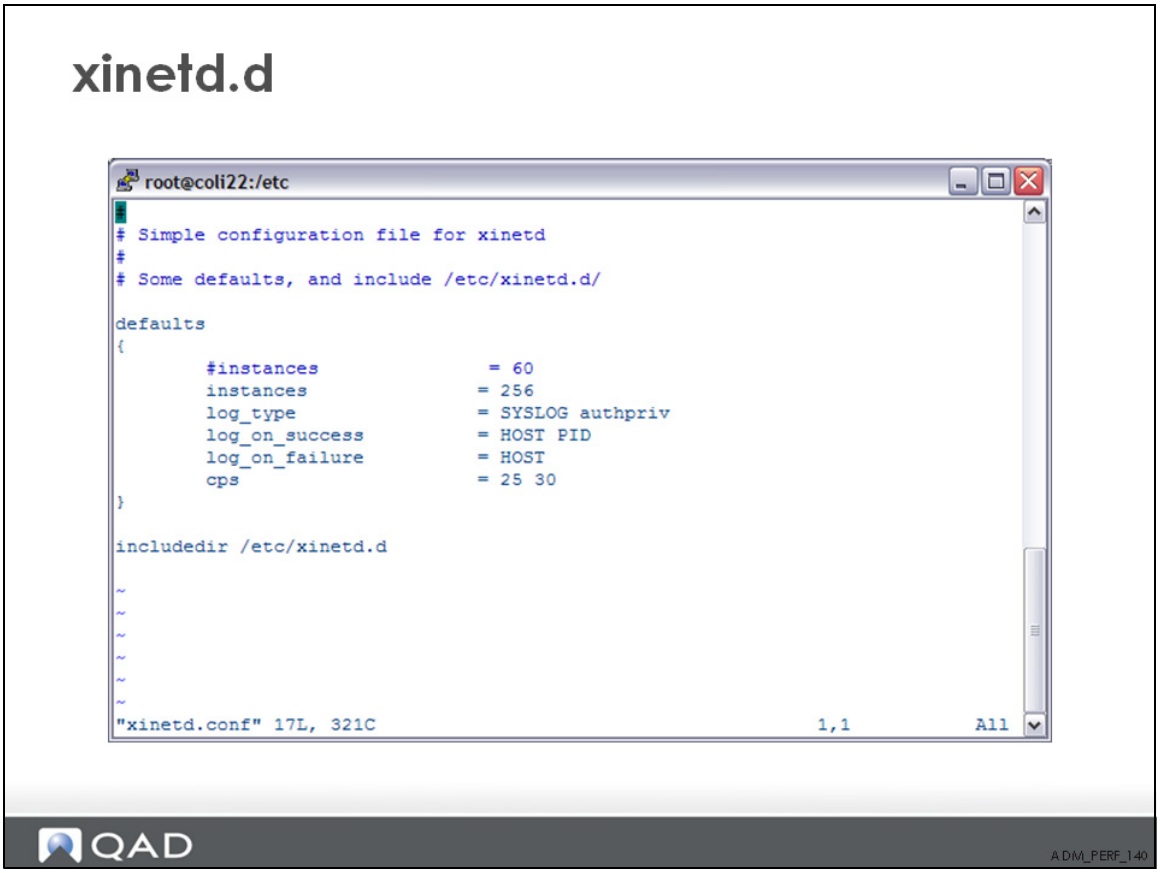
Kernel Considerations



Maximum File Size



xinetd.d


xinetd.d
root@coli22:/etc
Simple configuration file for xinetd
#
Some defaults, and include /etc/xinetd.d/
defaults
{
#instances = 60
instances = 256
log_type = SYSLOG authpriv
log_on_success = HOST PID
log_on_failure = HOST
cps = 25 30
}
includedir /etc/xinetd.d
"xinetd.conf" 17L, 321C 1,1 All
QAD
ADM_PERF_140

Additional Resources

Exercises and Knowledge Check

1 What is the purpose of the `-n` parameter?

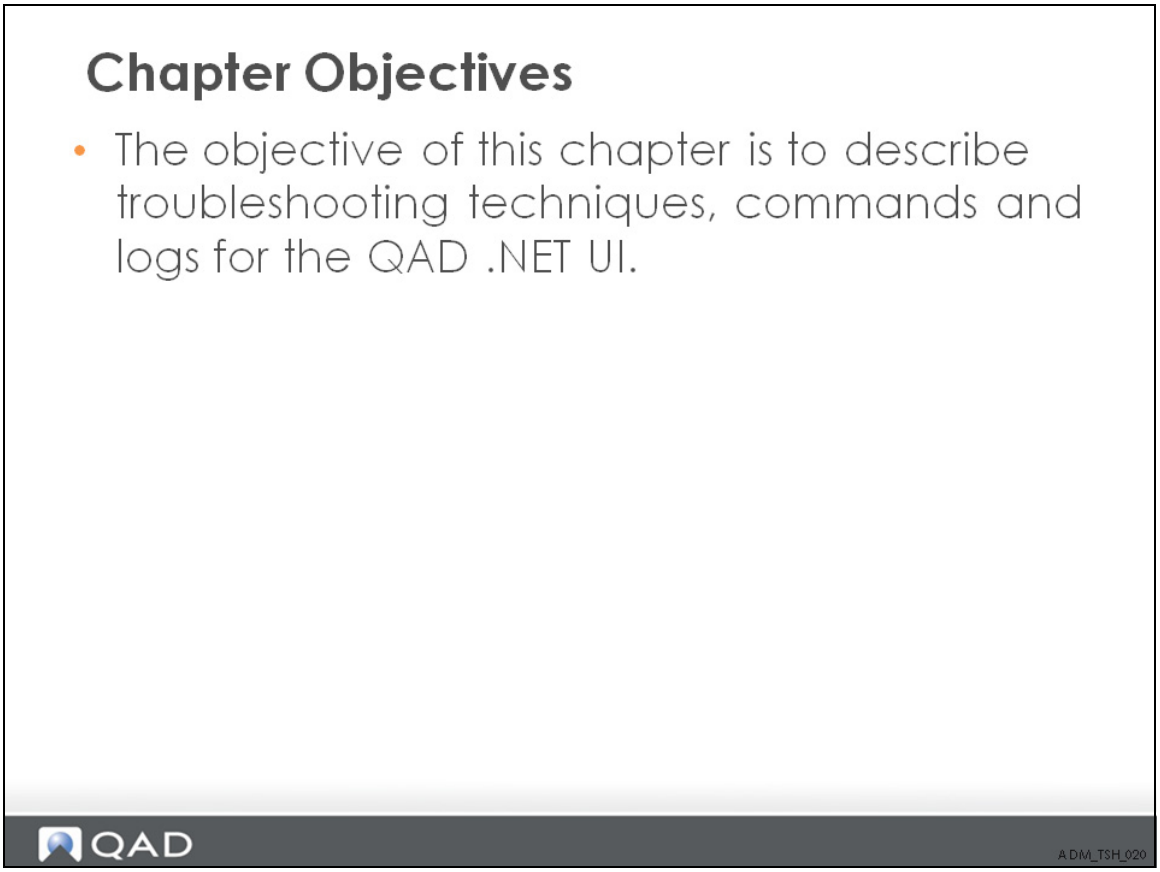
2 What is the purpose of the `lsof` and `ps -elf` UNIX commands?

3 What is the function of the `xinetd.d` program?

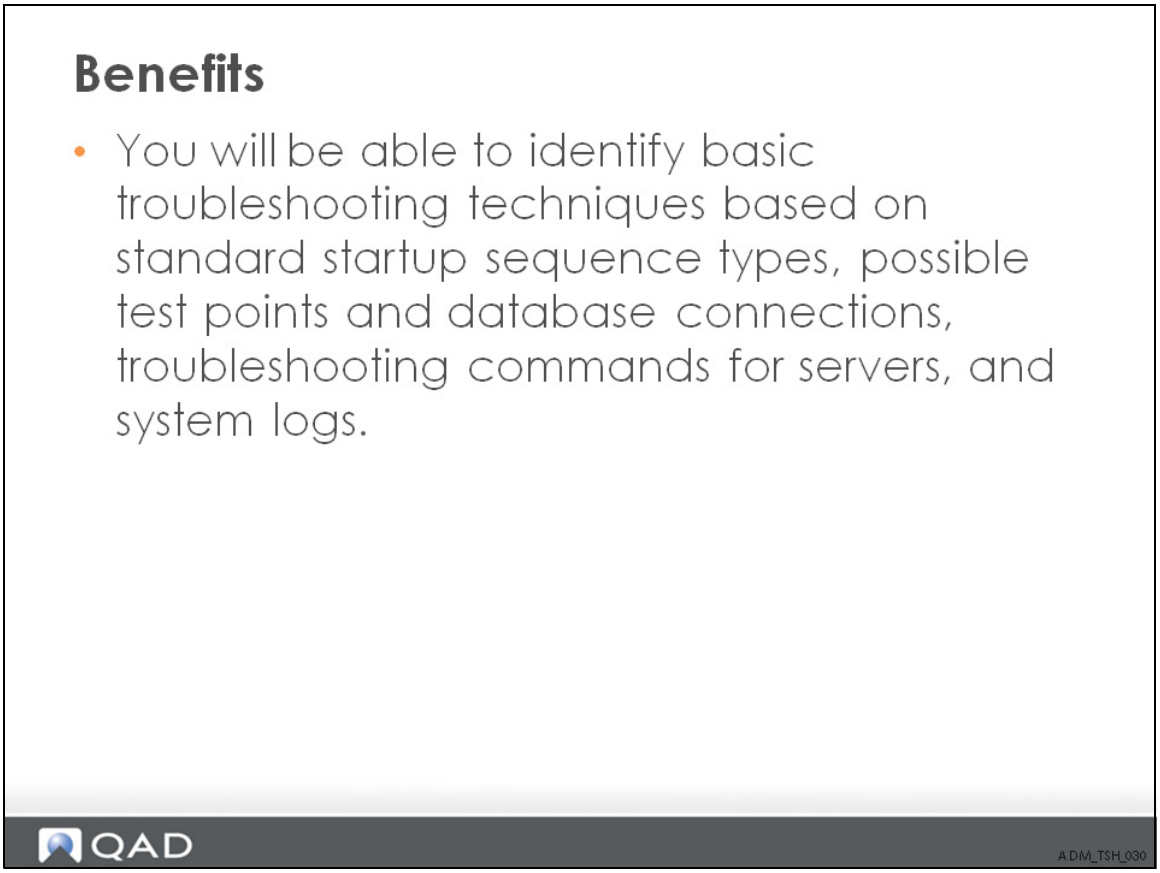
Chapter 5

Troubleshooting

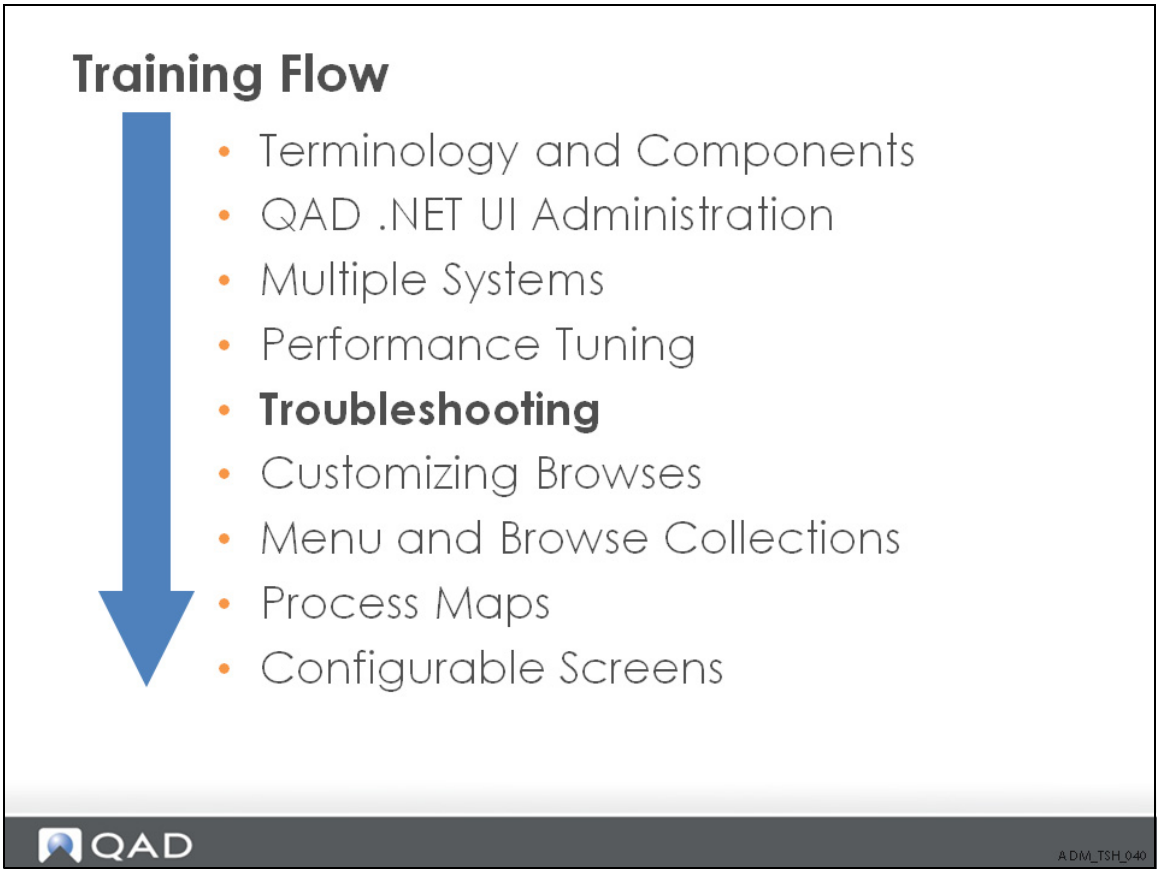
Chapter Objectives



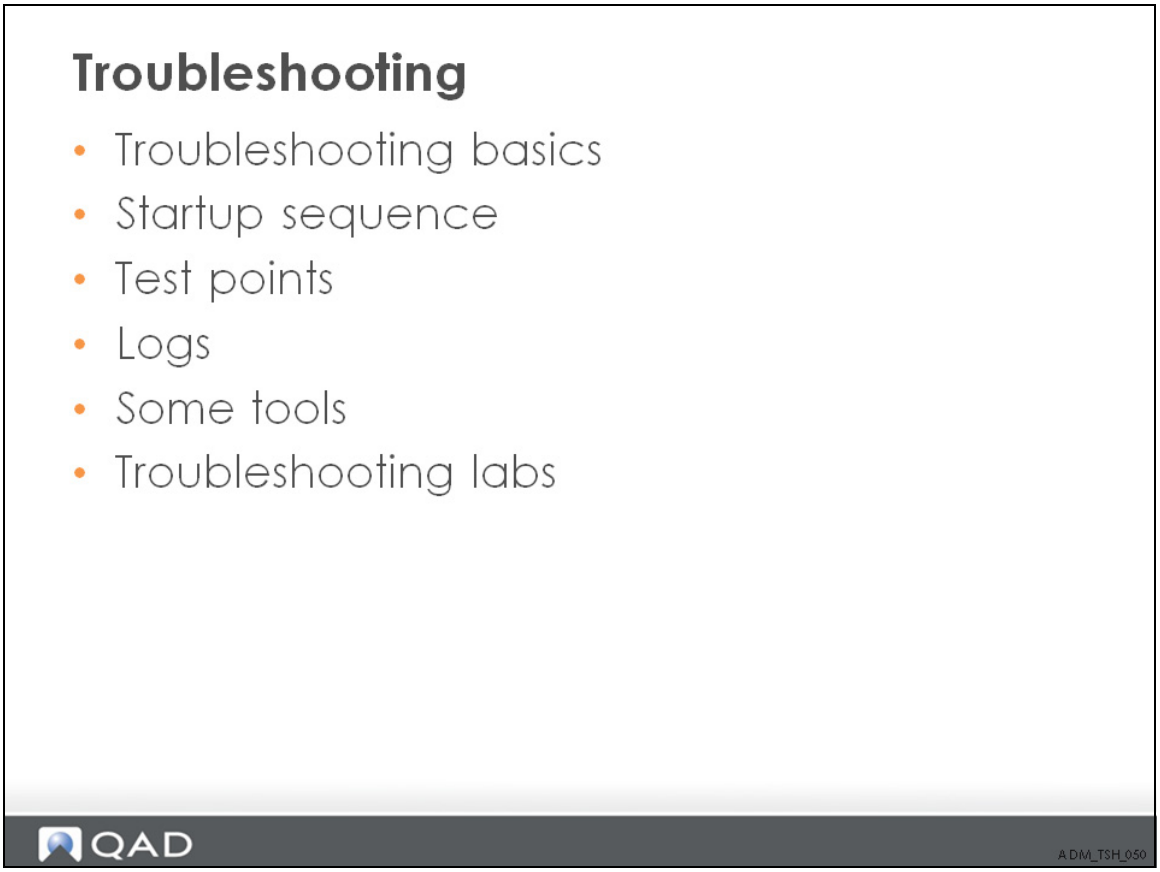
Benefits

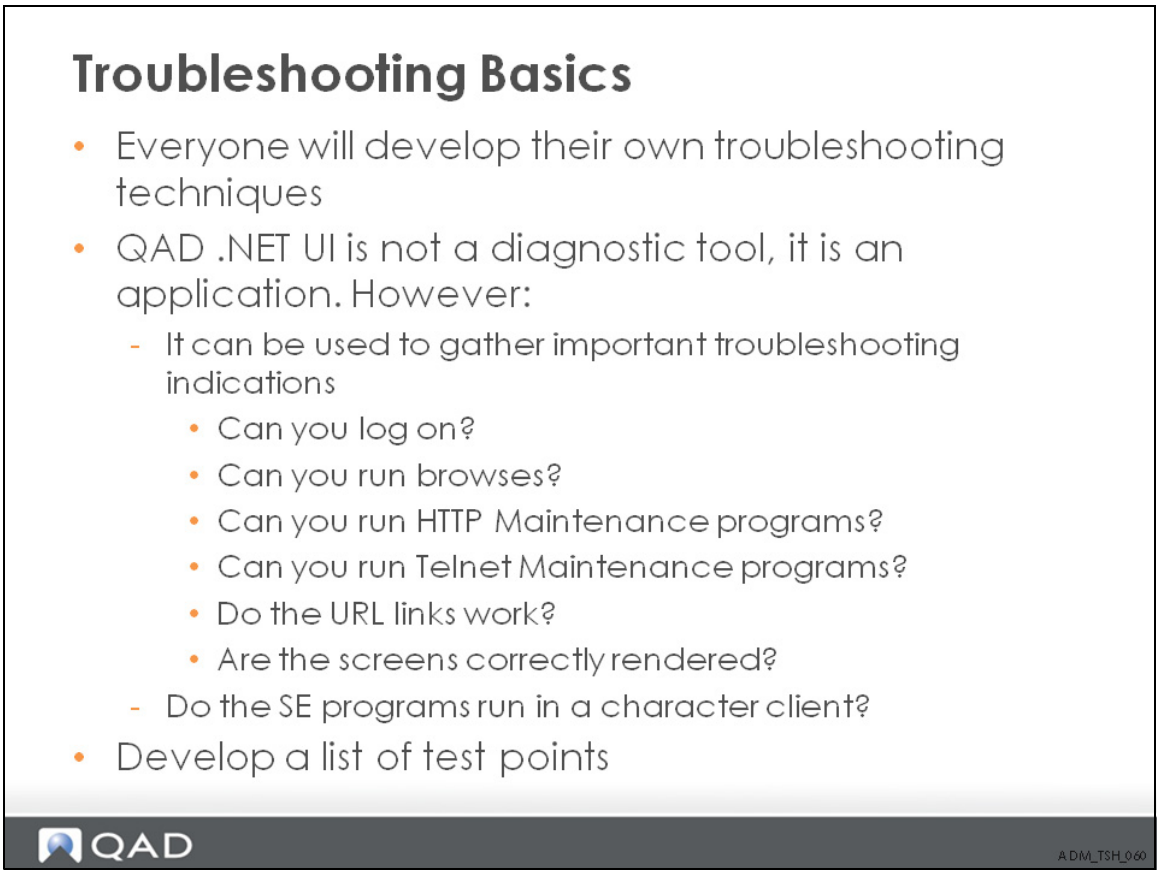

Benefits
• You will be able to identify basic troubleshooting techniques based on standard startup sequence types, possible test points and database connections, troubleshooting commands for servers, and system logs.
QAD
ADM_TSH_030

Training Flow

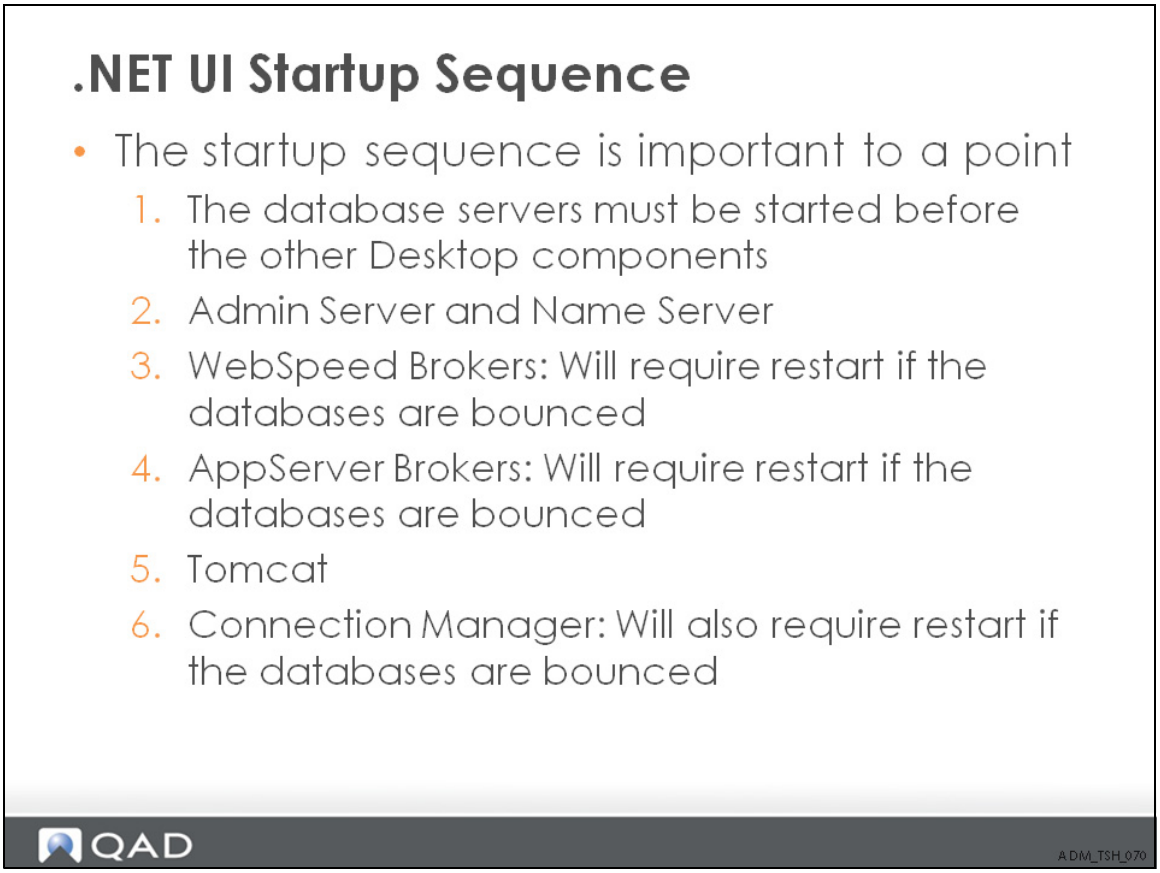


Overview

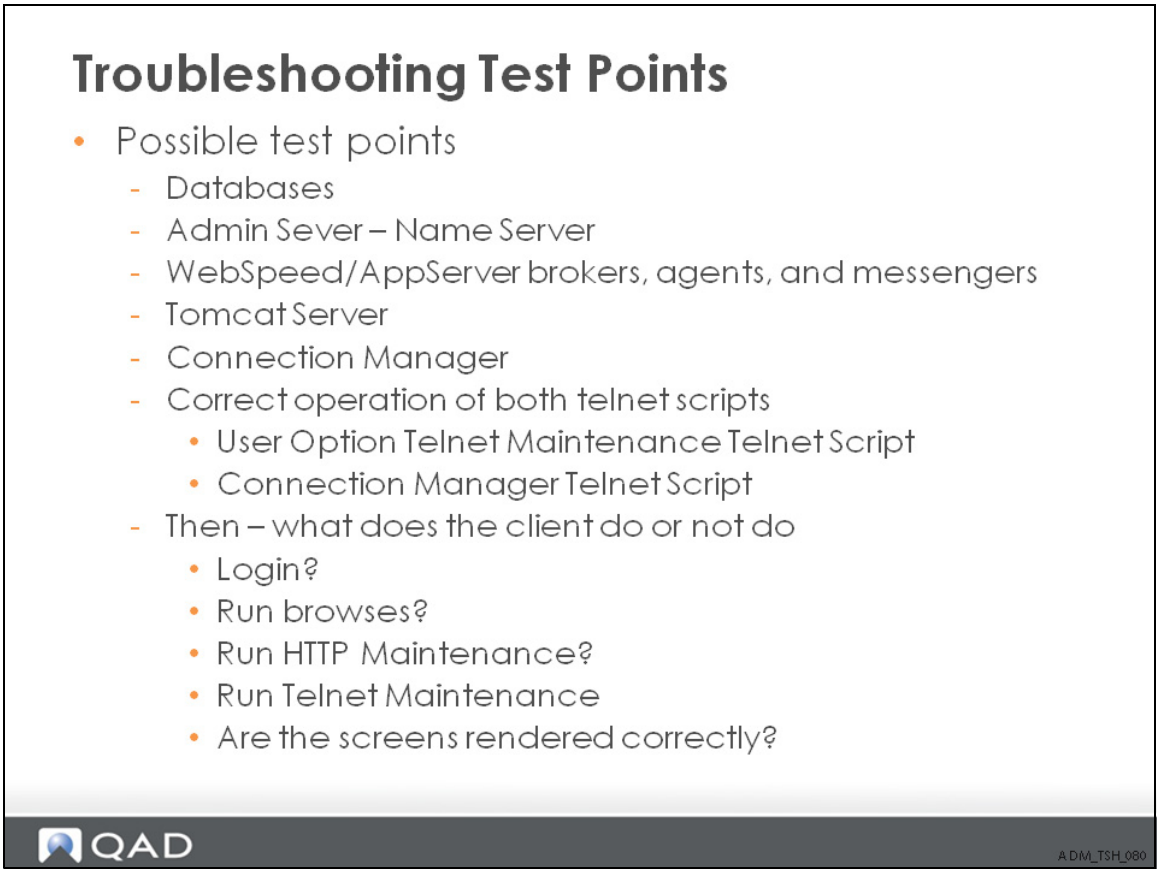

Troubleshooting
Troubleshooting basics
Startup sequence
Test points
Logs
Some tools
Troubleshooting labs
QAD
ADM_TSH_050


Troubleshooting Basics
Everyone will develop their own troubleshooting techniques
QAD .NET UI is not a diagnostic tool, it is an application. However:
It can be used to gather important troubleshooting indications
Can you log on?
Can you run browses?
Can you run HTTP Maintenance programs?
Can you run Telnet Maintenance programs?
Do the URL links work?
Are the screens correctly rendered?
Do the SE programs run in a character client?
Develop a list of test points
QAD
ADM_TSH_060

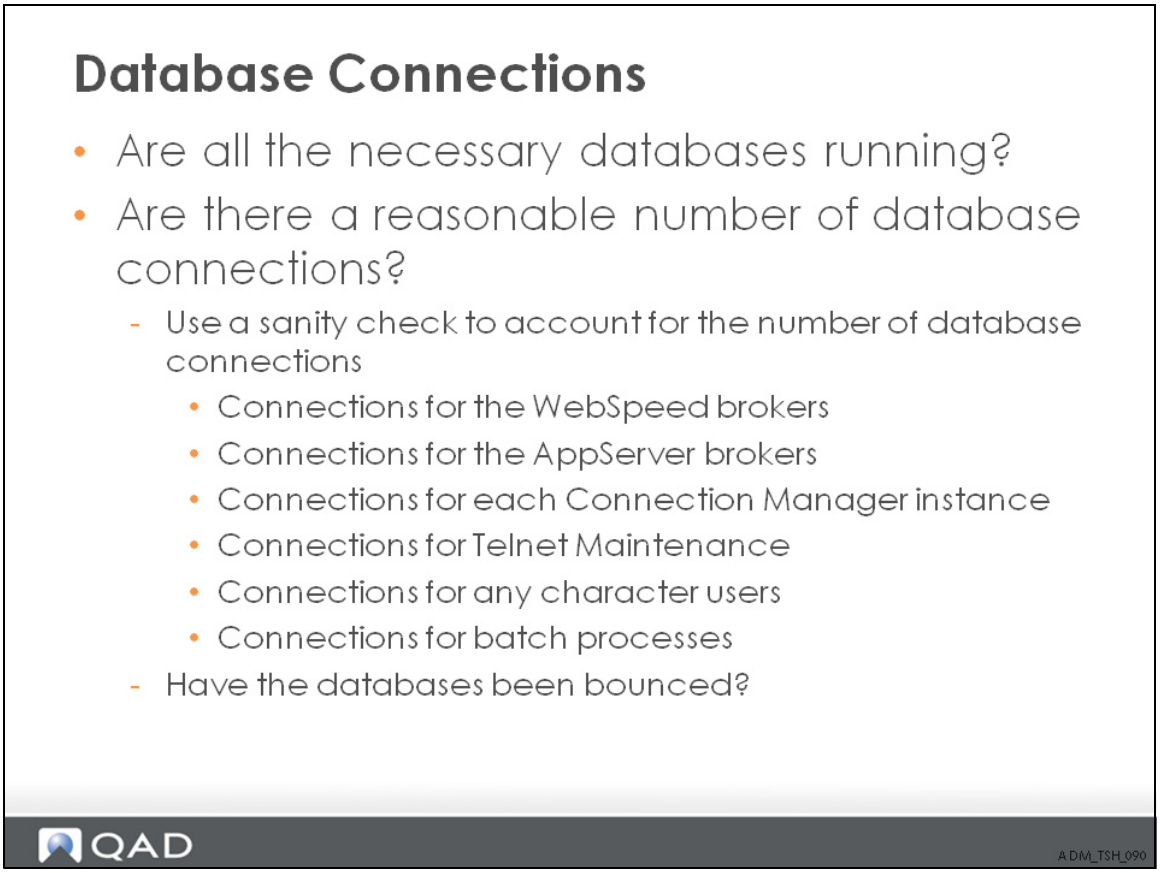
Startup Sequence



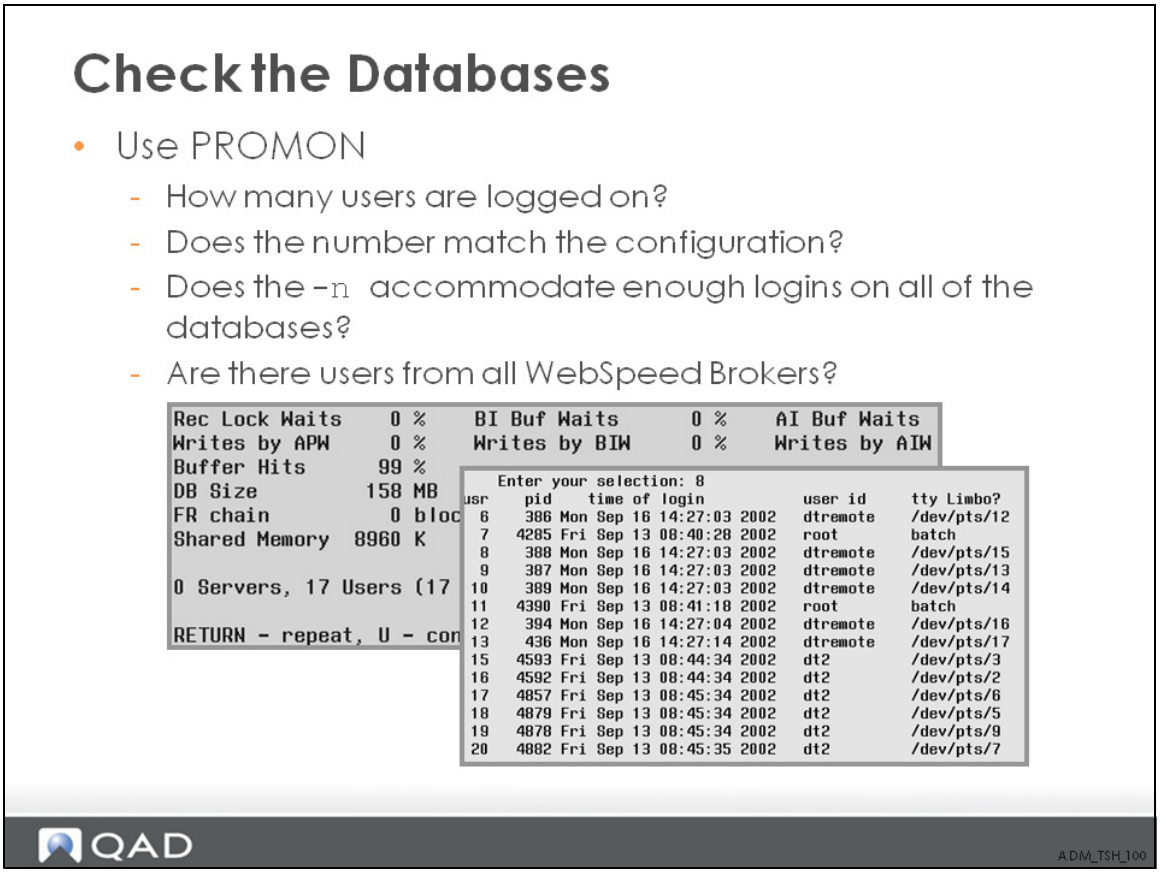
Test Points


Troubleshooting Test Points
Possible test points
Databases
Admin Sever – Name Server
WebSpeed/AppServer brokers, agents, and messengers
Tomcat Server
Connection Manager
Correct operation of both telnet scripts
User Option Telnet Maintenance Telnet Script
Connection Manager Telnet Script
Then – what does the client do or not do
Login?
Run browses?
Run HTTP Maintenance?
Run Telnet Maintenance
Are the screens rendered correctly?
QAD
ADM_TSH_080

Database Connections

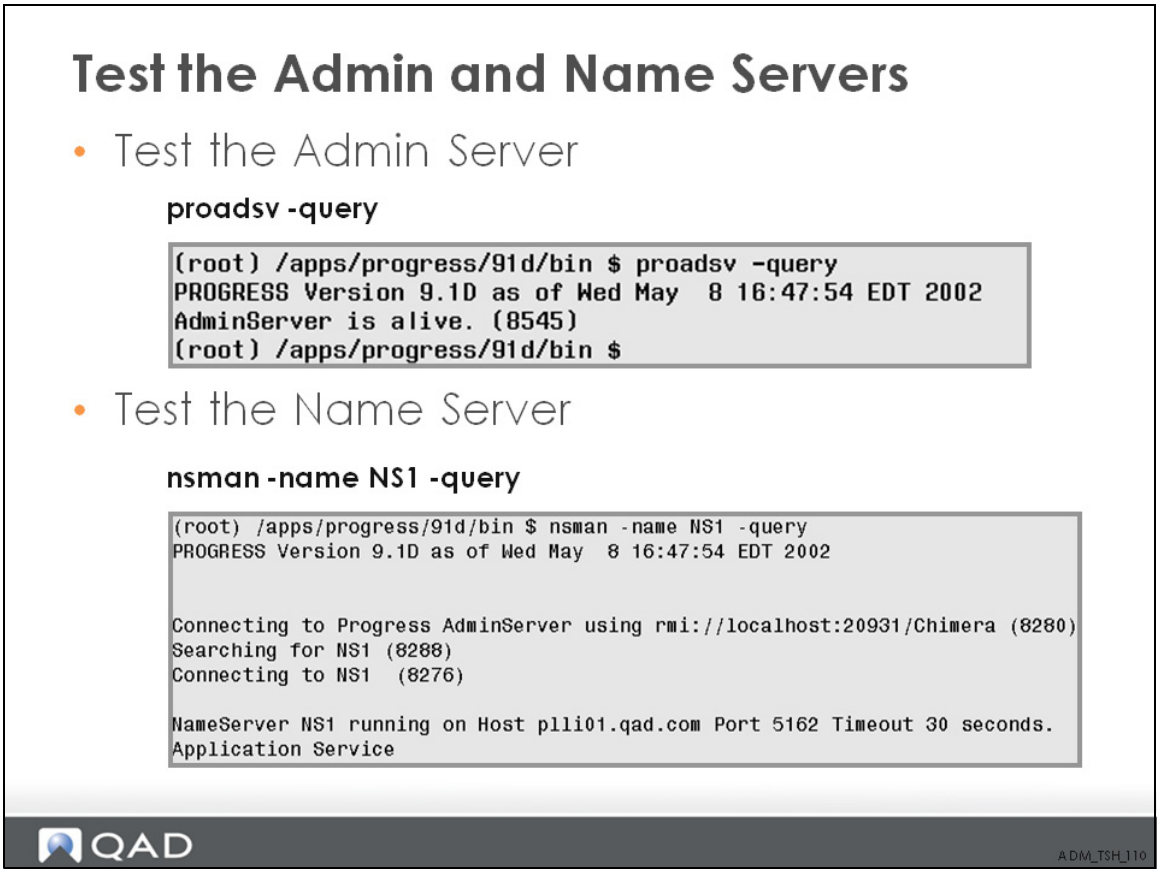


PROMON



PROMON is a Progress command that displays server, configuration, and user information.

Admin and Name Servers

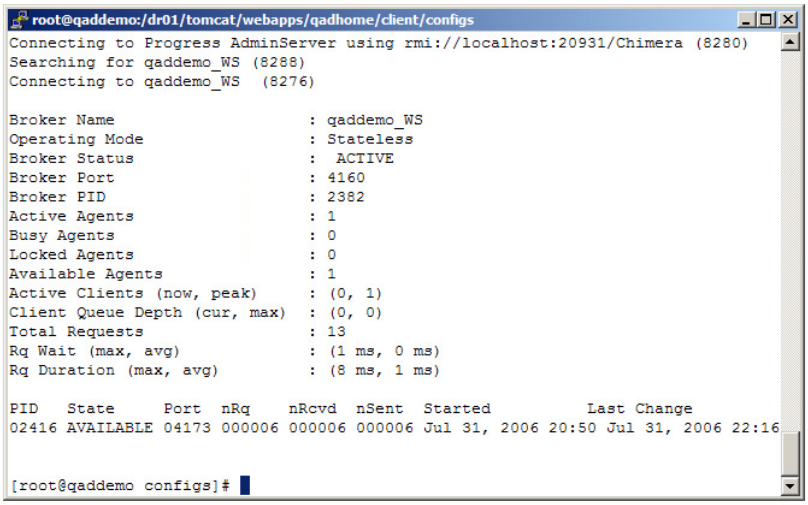


WebSpeed Brokers

Test the WebSpeed Broker(s)

- Test the broker and agents

wtbman -name qaddemo_WS -query



QAD

ADM_TSH_120

Appserver Brokers

Test the AppServer Broker(s)

- Test the broker and agents

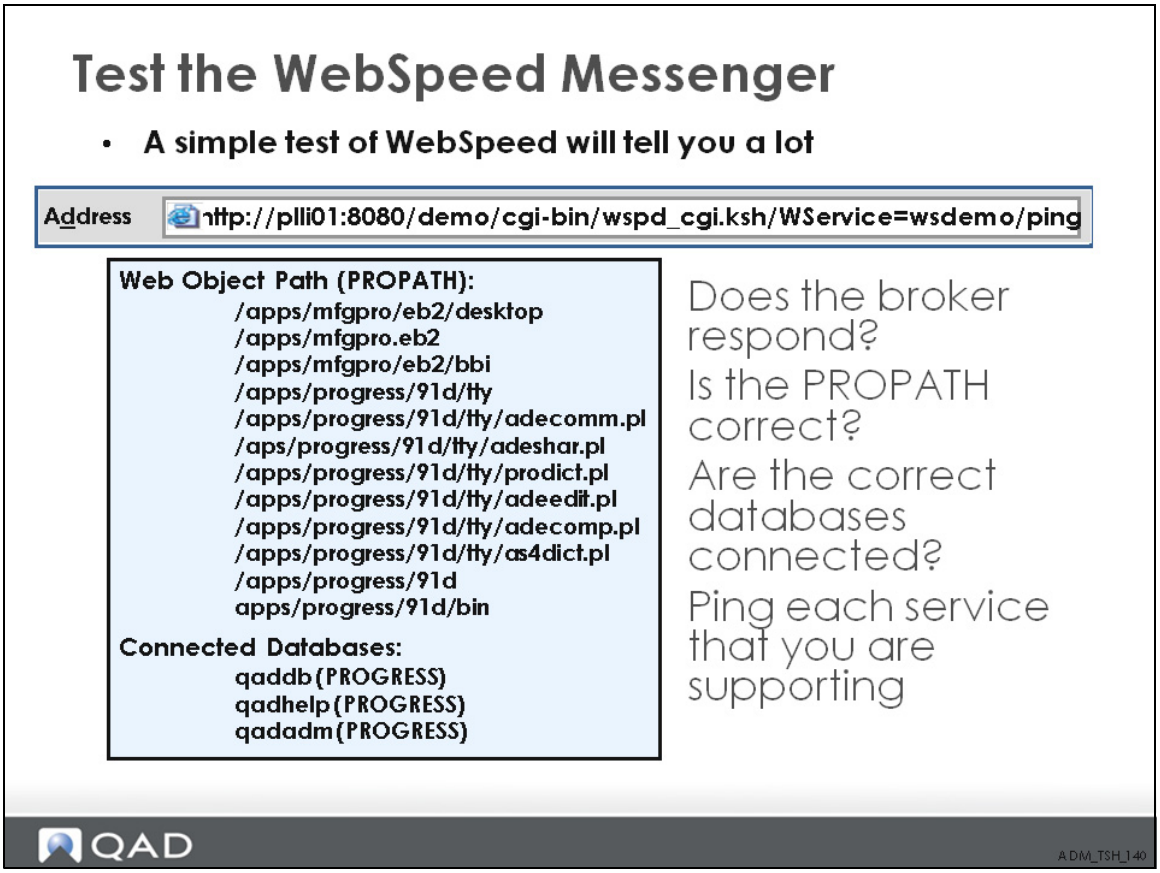
asbman -name qaddemo_AS -query

```
root@qaddemo:/dr01/tomcat/webapps/qadhome/client/configs
Connecting to Progress AdminServer using rmi://localhost:20931/Chimera (8280)
Searching for qaddemo_AS (8288)
Connecting to qaddemo_AS  (8276)

Broker Name                    : qaddemo_AS
Operating Mode                 : Stateless
Broker Status                  :  ACTIVE
Broker Port                    : 4150
Broker PID                     : 2446
Active Servers                 : 1
Busy Servers                   : 0
Locked Servers                 : 0
Available Servers              : 1
Active Clients (now, peak)     : (0, 0)
Client Queue Depth (cur, max)  : (0, 0)
Total Requests                 : 0
Rq Wait (max, avg)             : (0 ms, 0 ms)
Rq Duration (max, avg)         : (0 ms, 0 ms)

PID   State     Port  nRq    nRcvd  nSent  Started          Last Change
02484 AVAILABLE 04179 000000 000000 000000 Jul 31, 2006 20:50 Jul 31, 2006 20:50


[root@qaddemo configs]#
```

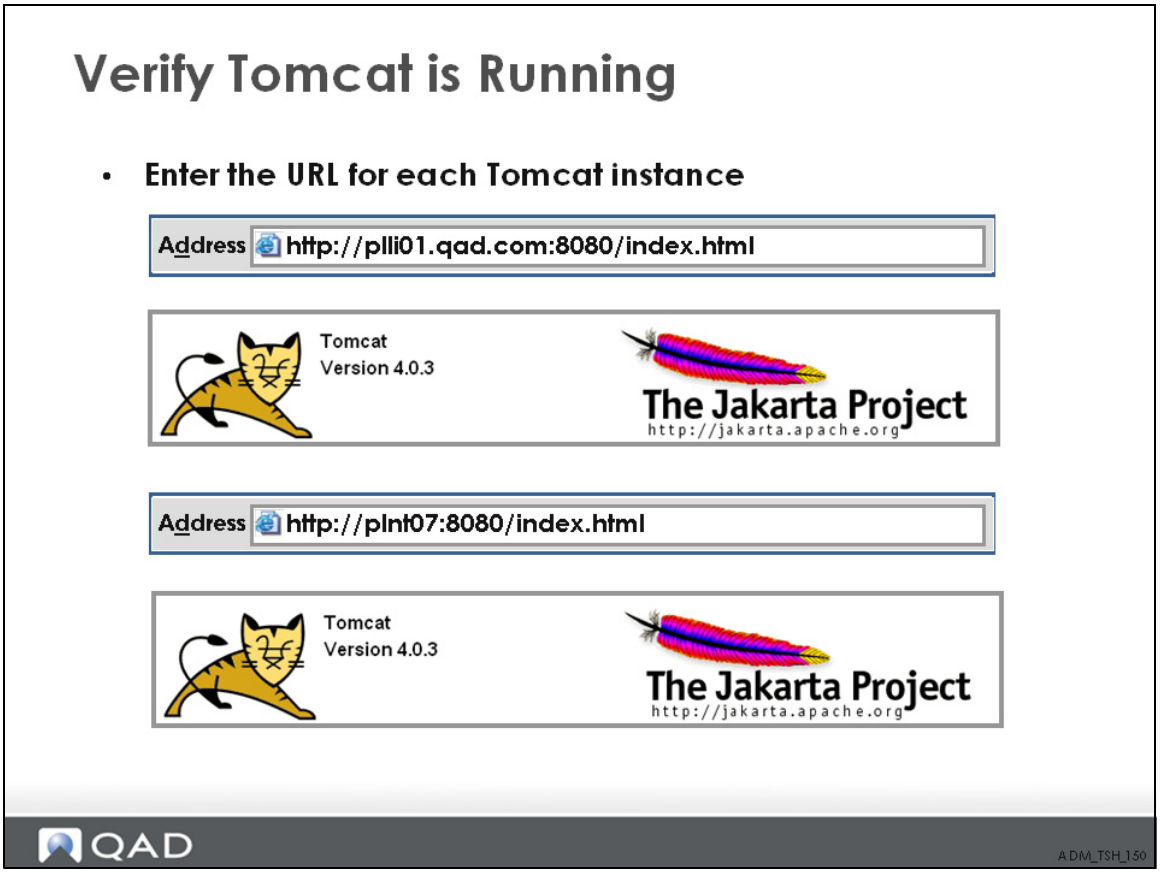
QAD

ADM_TSH_130

WebSpeed Messenger

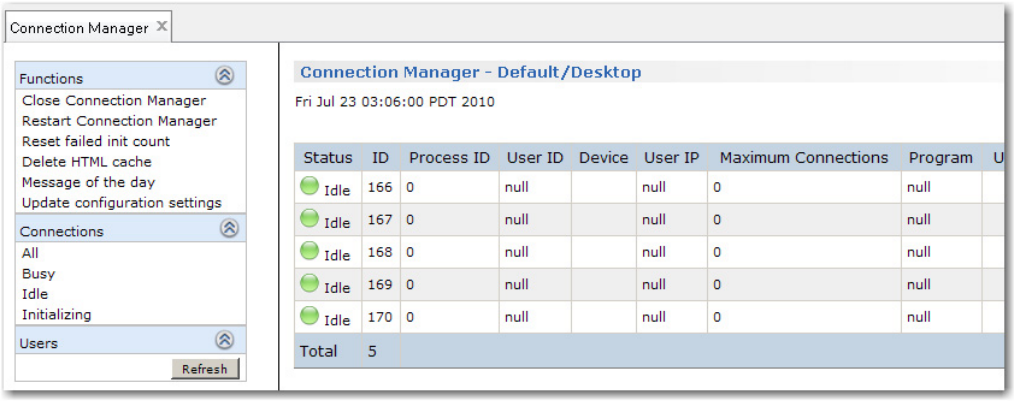


Is Tomcat Running?



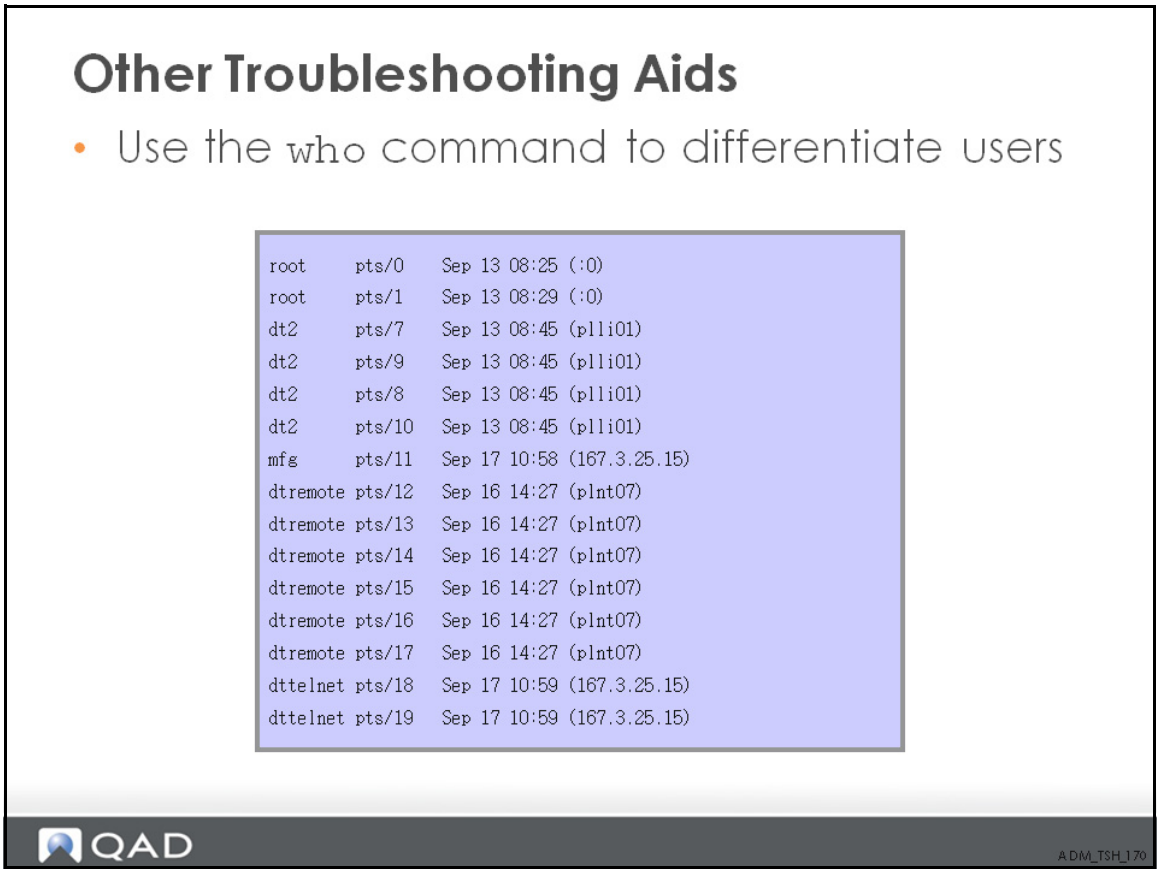
Test the Tomcat Web App

- Log in to the application and run Connection Manager

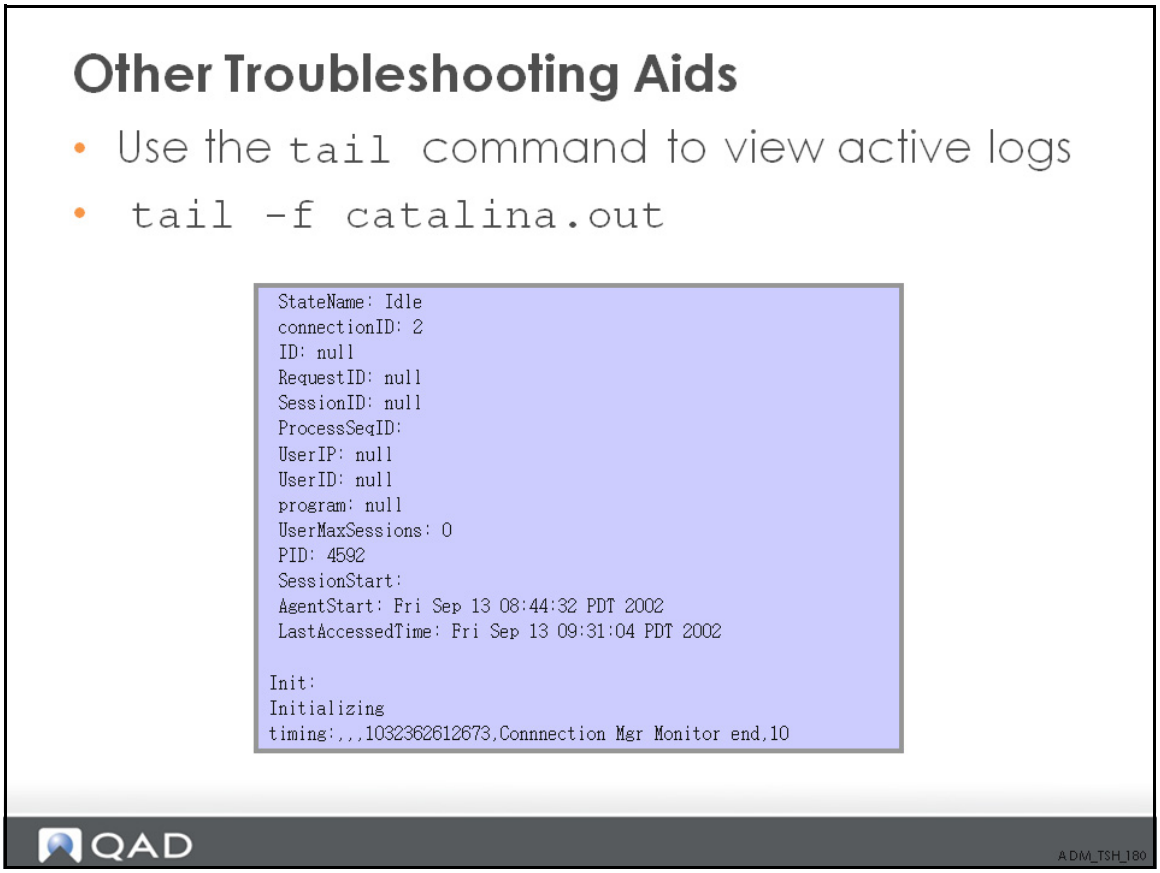


- Is Connection Manager functioning?

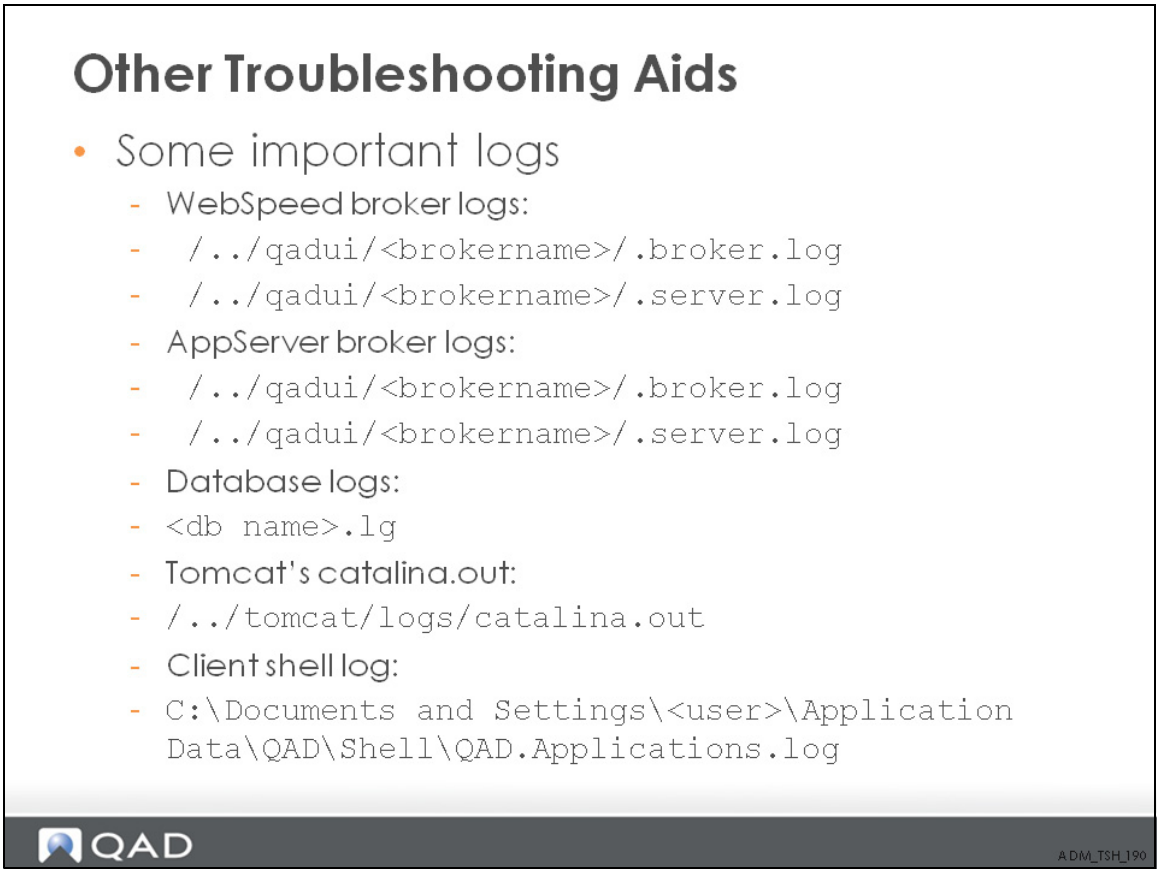
who Command


Other Troubleshooting Aids
• Use the who command to differentiate users
root pts/0 Sep 13 08:25 (:0)
root pts/1 Sep 13 08:29 (:0)
dt2 pts/7 Sep 13 08:45 (plli01)
dt2 pts/9 Sep 13 08:45 (plli01)
dt2 pts/8 Sep 13 08:45 (plli01)
dt2 pts/10 Sep 13 08:45 (plli01)
mfg pts/11 Sep 17 10:58 (167.3.25.15)
dtremote pts/12 Sep 16 14:27 (plnt07)
dtremote pts/13 Sep 16 14:27 (plnt07)
dtremote pts/14 Sep 16 14:27 (plnt07)
dtremote pts/15 Sep 16 14:27 (plnt07)
dtremote pts/16 Sep 16 14:27 (plnt07)
dtremote pts/17 Sep 16 14:27 (plnt07)
dttelnet pts/18 Sep 17 10:59 (167.3.25.15)
dttelnet pts/19 Sep 17 10:59 (167.3.25.15)
QAD
ADM_TSH_170

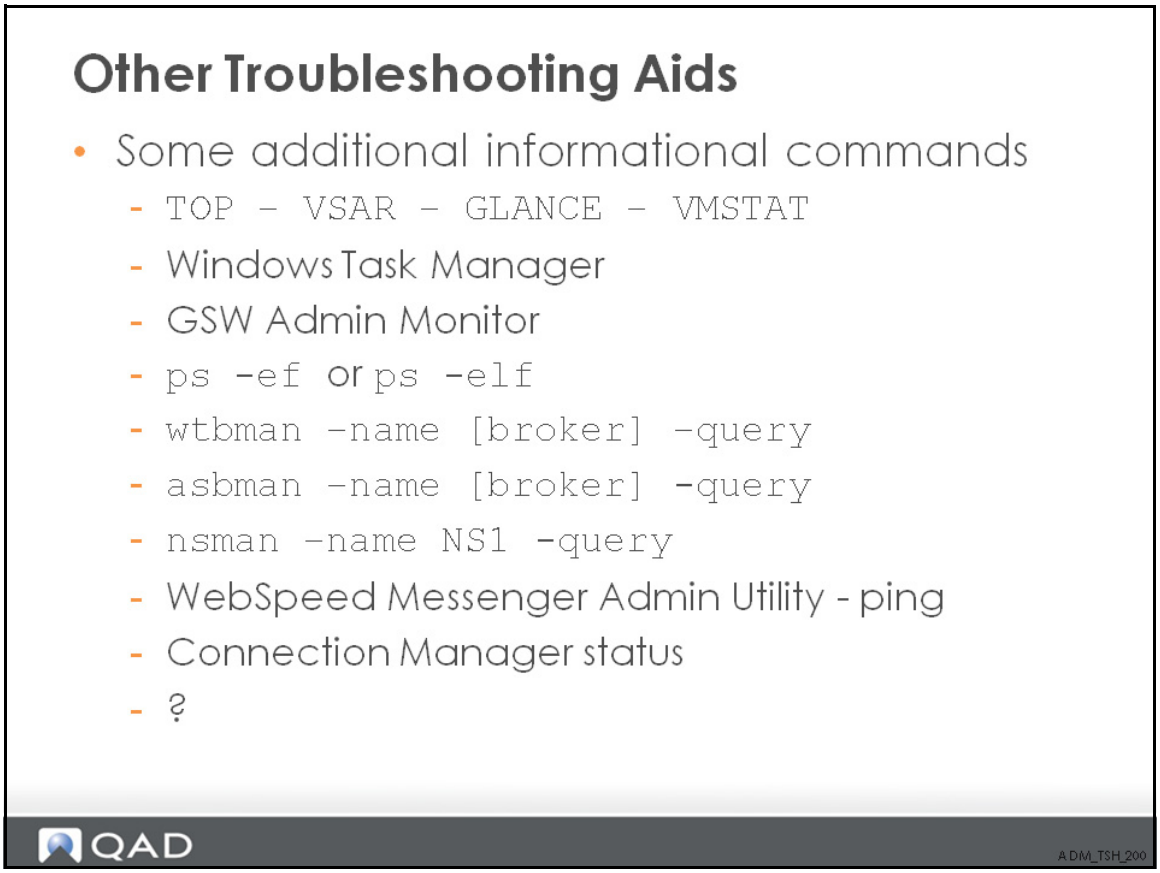
tail Command



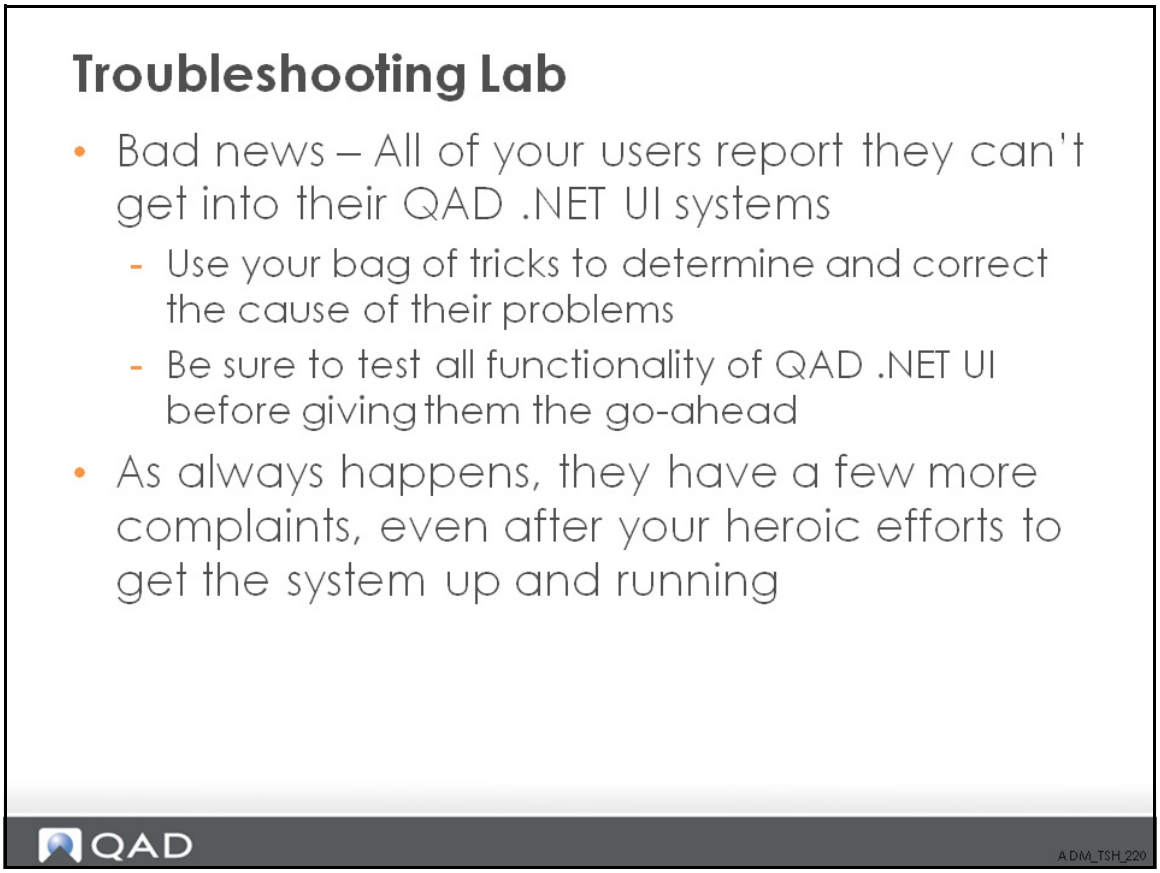
Troubleshooting Logs



Additional Commands



Troubleshooting Lab



Exercises and Knowledge Check

4 When databases are bounced, which services need to be re-started?

5 Which two commands do you use to test the Admin and Name servers?

6 How do you test WebSpeed Messenger?

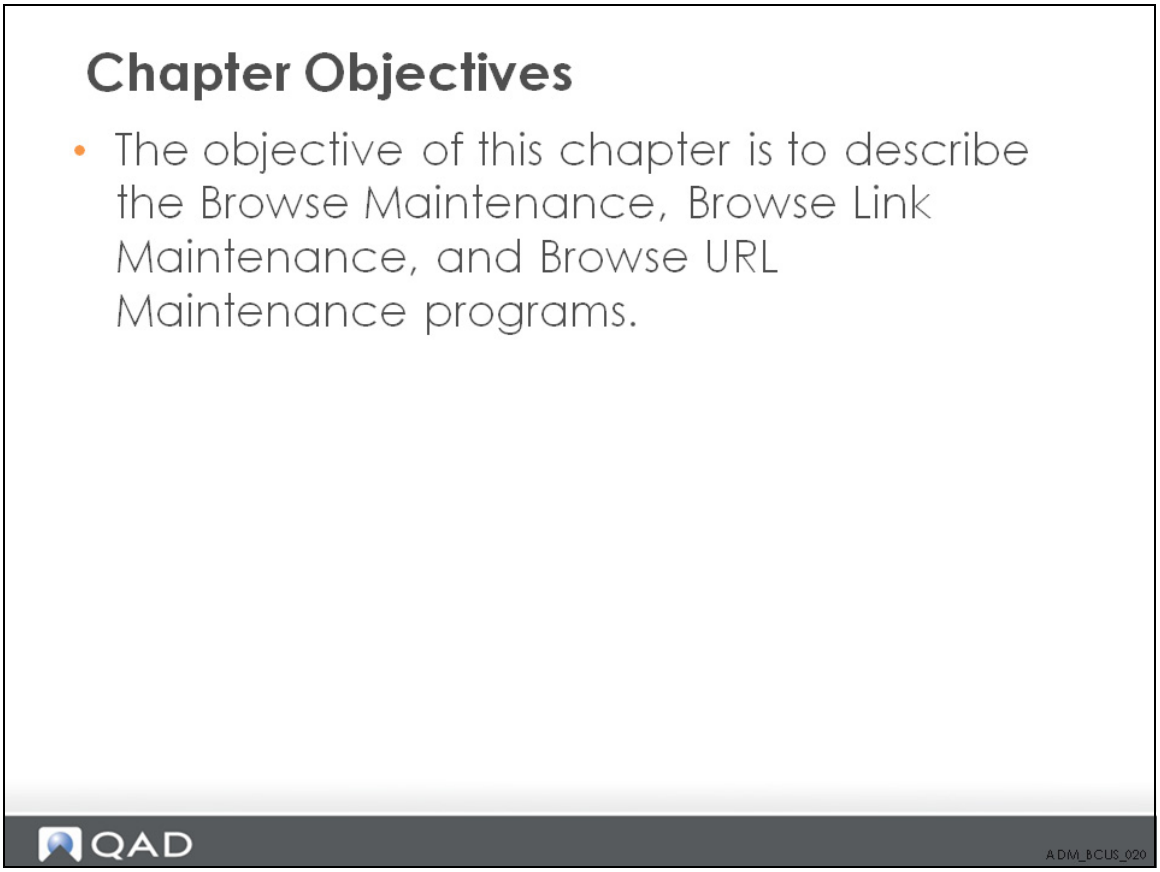
7 What is the purpose of the `tail` command?

8 Where are the Appserver and `catalina.out` logs located?

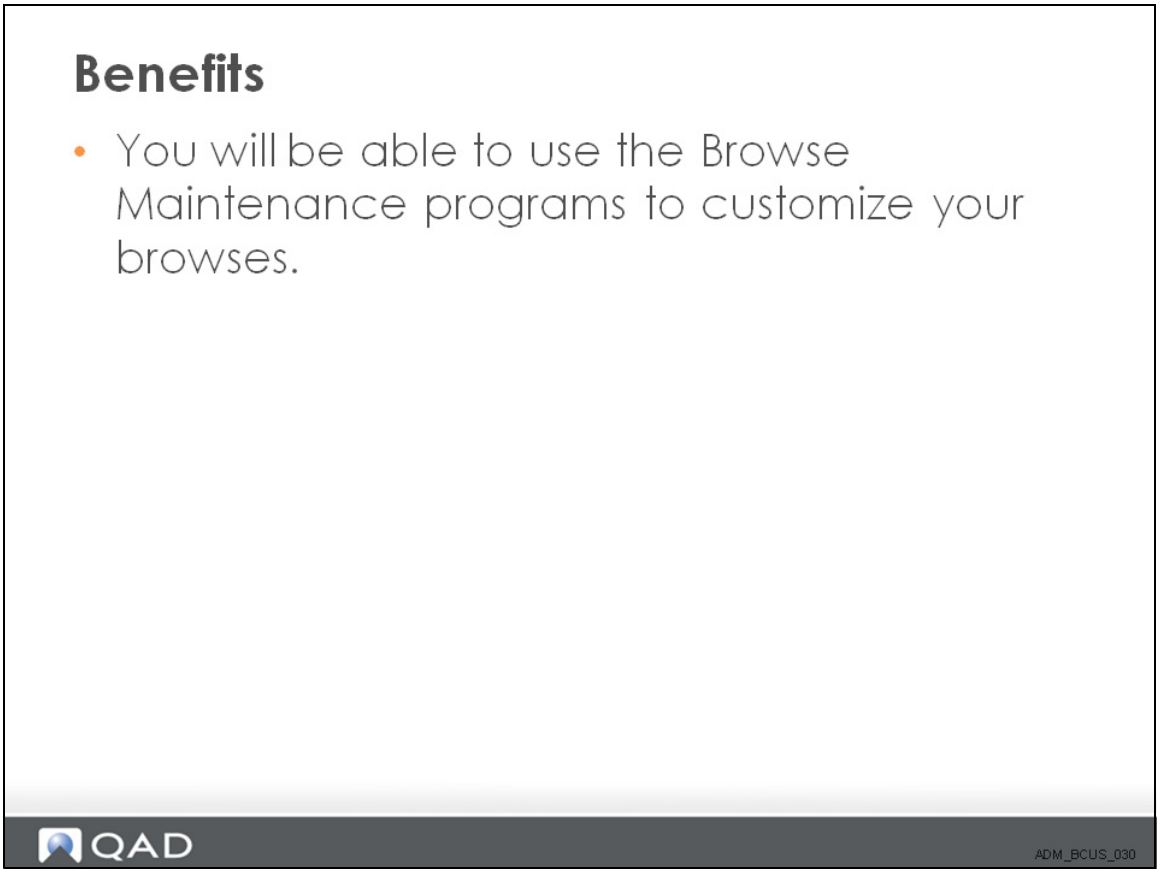
Chapter 6

Customizing Browses

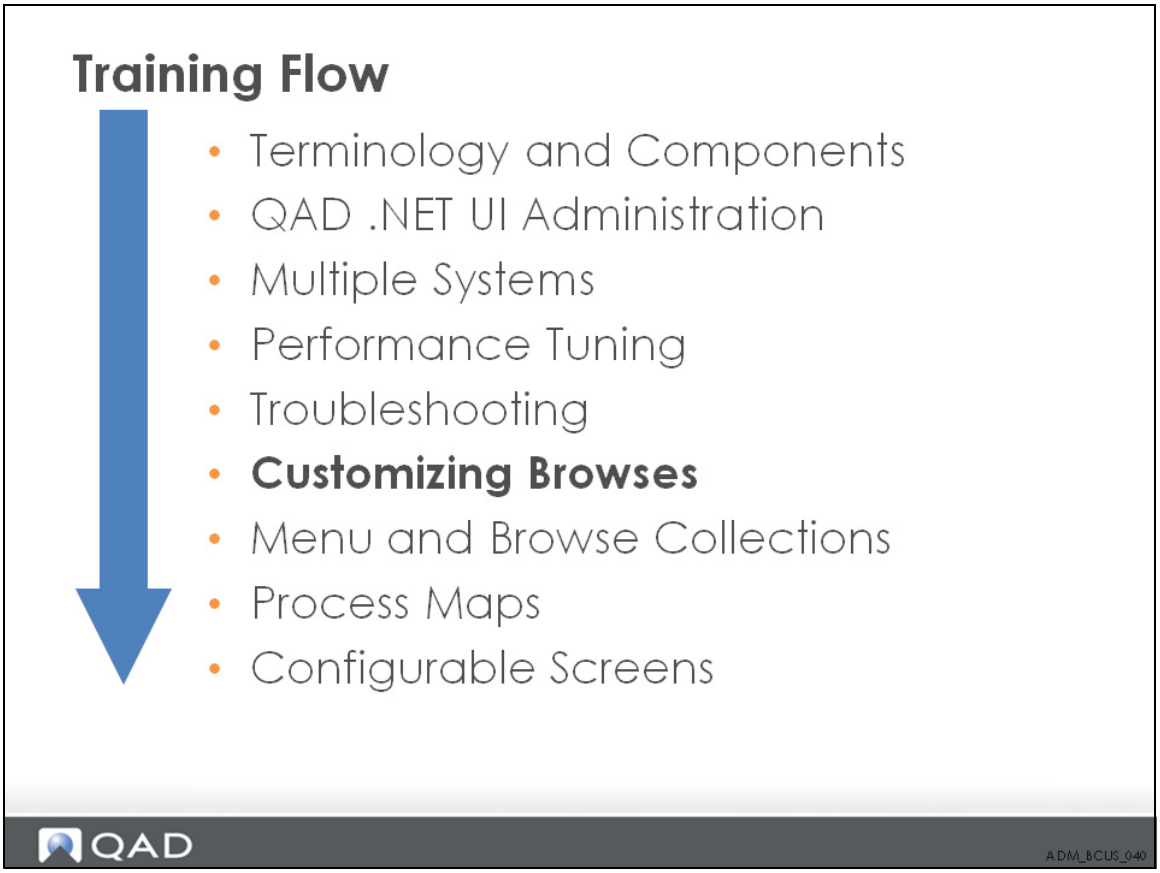
Chapter Objectives



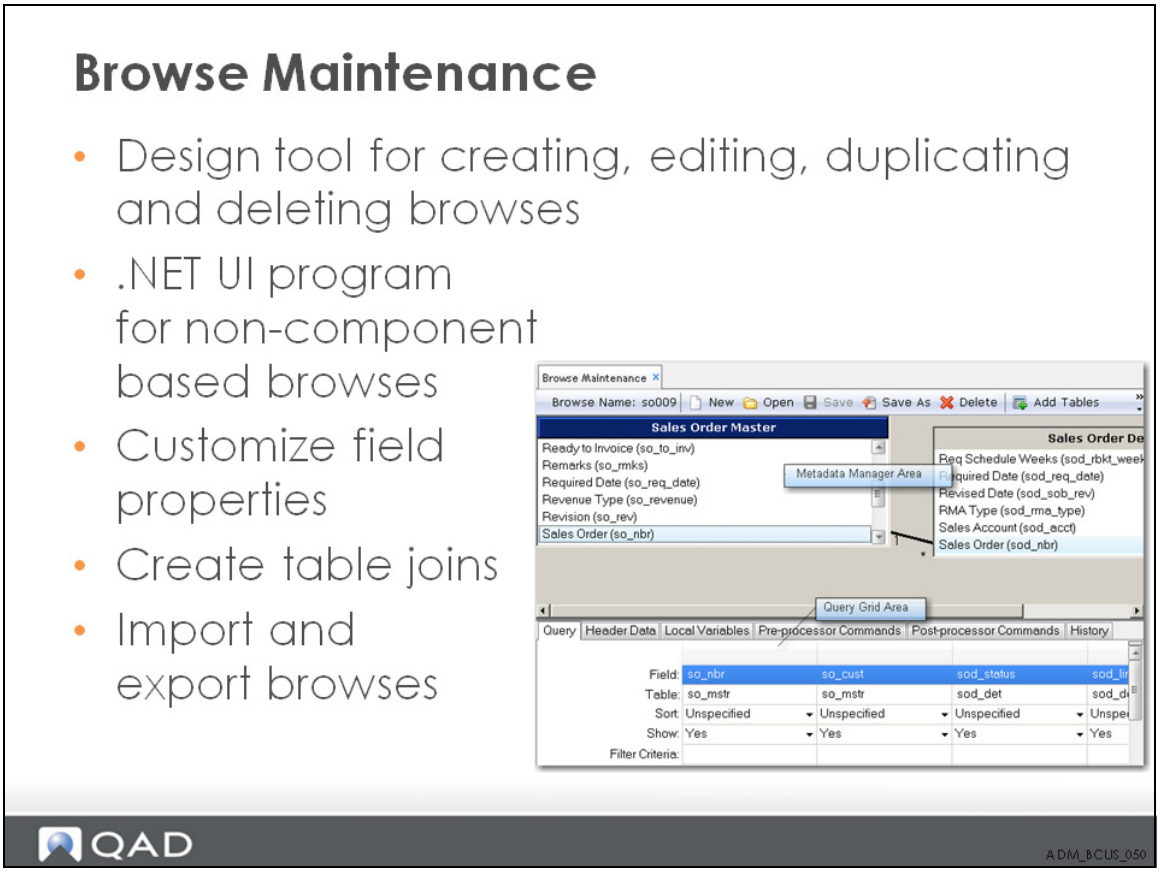
Benefits


Benefits
• You will be able to use the Browse Maintenance programs to customize your browses.
QAD
ADM_BCUS_030

Training Flow



Browse Maintenance

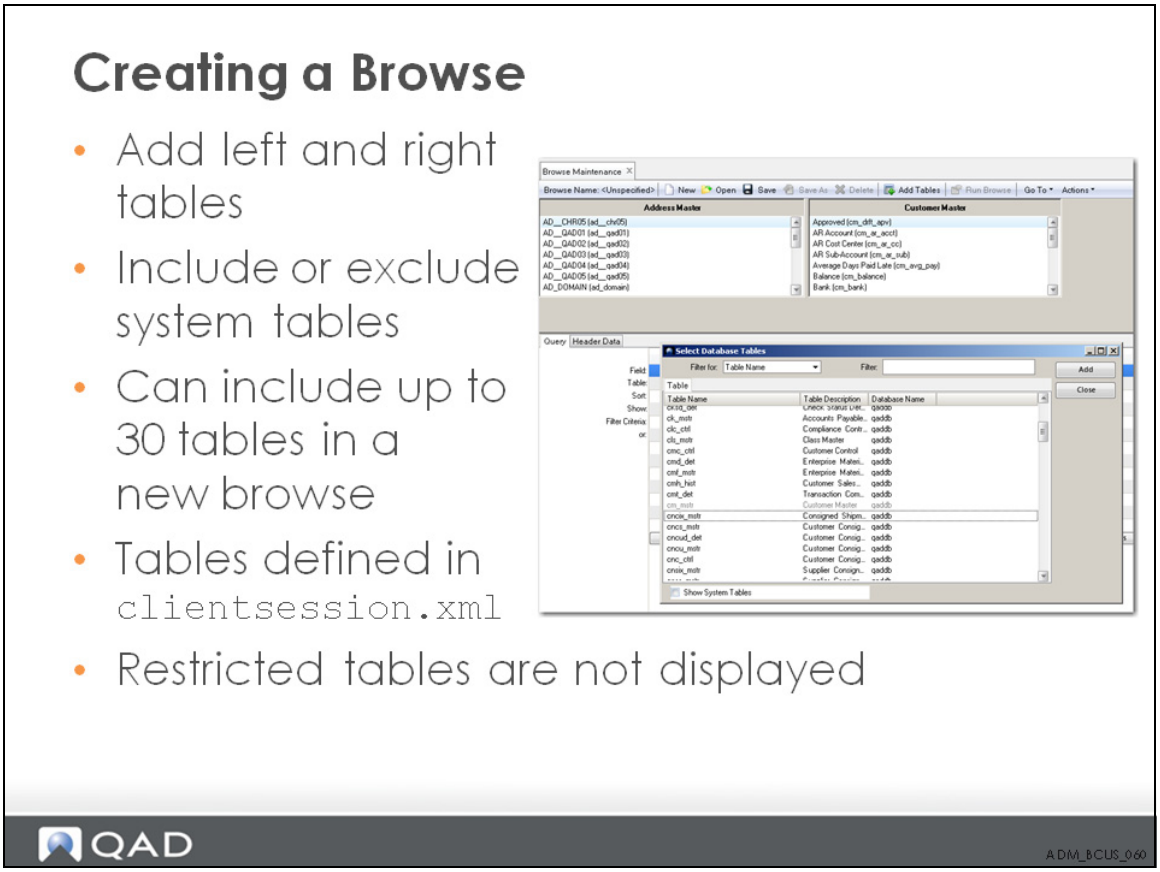


Use Browse Maintenance to specify the components of a browse. The storage of the browse definition is performed automatically.

All browses created by Browse Maintenance (.NET User Interface) can be maintained in the Character UI.

There is no limit to the number of tables you can include using the .NET UI Browse Maintenance, but including more than 30 tables in a browse definition can cause the .NET UI Browse Engine to halt. The Browse Engine was originally designed with a four-table limit to avoid Progress performance issues. The Character UI Browse engine and Desktop Browse engine have four-table limits.

Creating a Browse



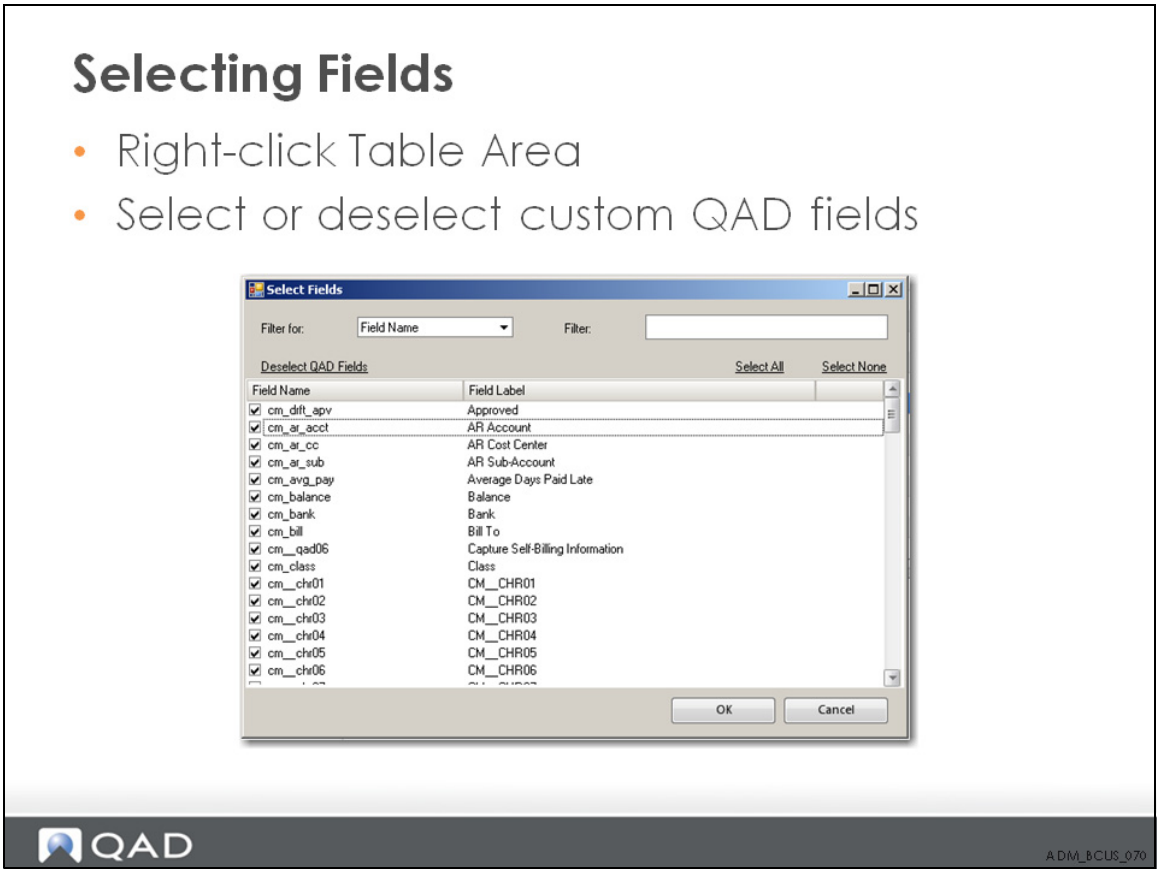
When you start Browse Maintenance, the function is ready to create a new browse.

Double-click on the name of the table you want to add as the left table, and then double-click on the name of the table you want to add as the right table.

In the Select Database Tables screen, the Show System Tables screen ensures that system tables (such as `*_Db`, `*_File`, and `*_Field`) are displayed in the Table List.

The tables displayed for each program are defined in the `client-session.xml` file. The Browse Maintenance function reads this .XML file before populating the Select Tables screen. You can prevent tables from being displayed by modifying this file.

Selecting Fields

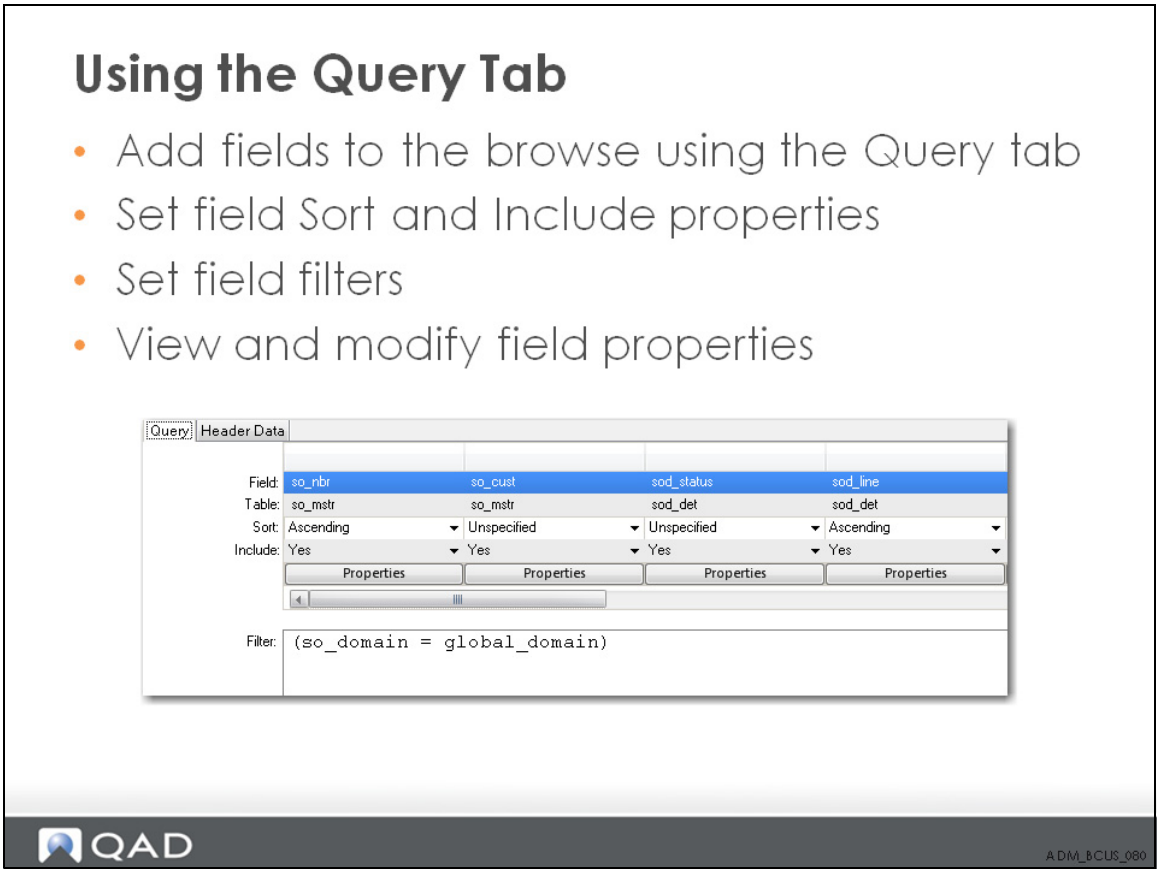


The Select Fields dialog has the following constraints:

- A field used in a table join may not be unchecked and is displayed as grayed-out text in the dialog field list.
- A minimum of one field must be checked in the dialog field list before clicking OK to exit the screen.

When you have selected a subset of fields for a table, only the selected fields are displayed in the table control area. Note the filter icon displayed in the upper right corner of the Table Control to indicate to the user that a filtered list of fields is being displayed.

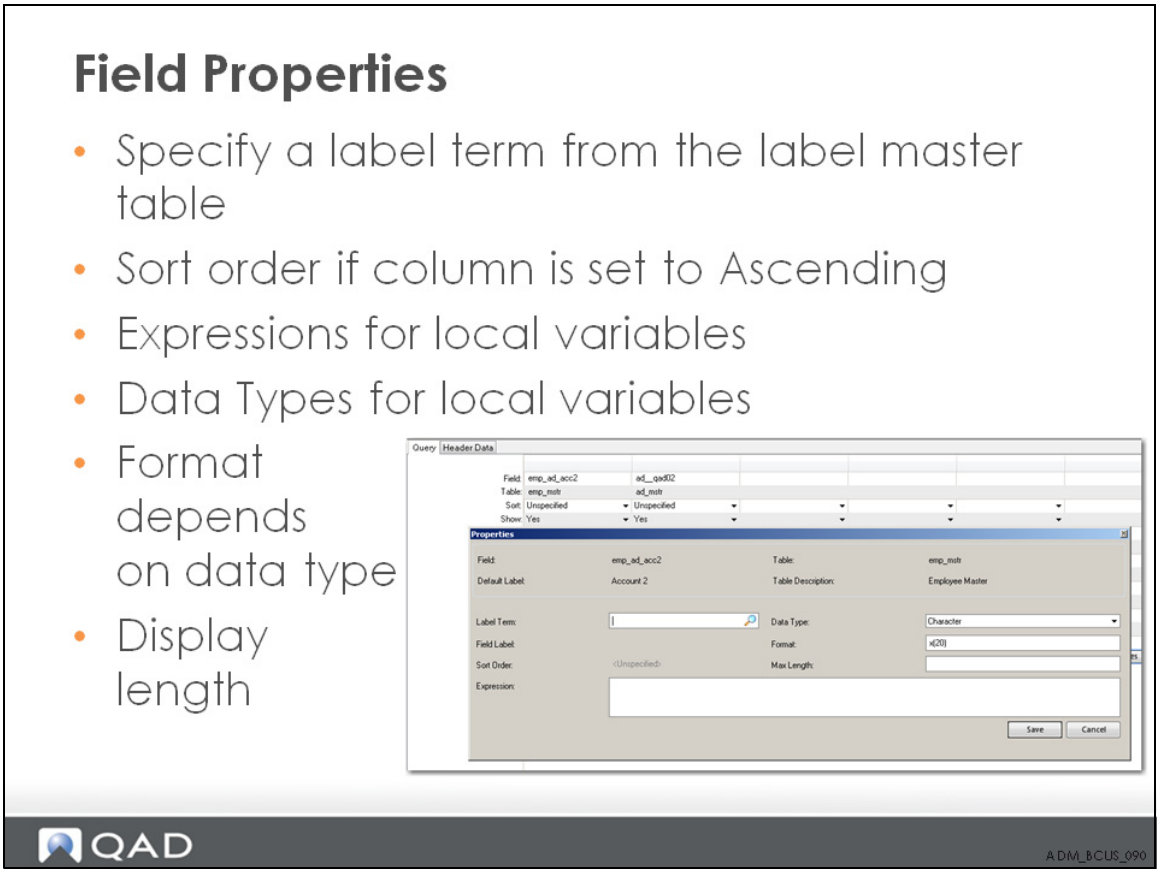
Using the Query Tab



To add a field from a table to the browse, drag-and-drop a field from the table to a column in the Query section. Note that you can view and modify the properties by clicking on the Properties button at the bottom of the column.

To insert new blank columns into the grid, right-click the column header to display the column options.

Field Properties



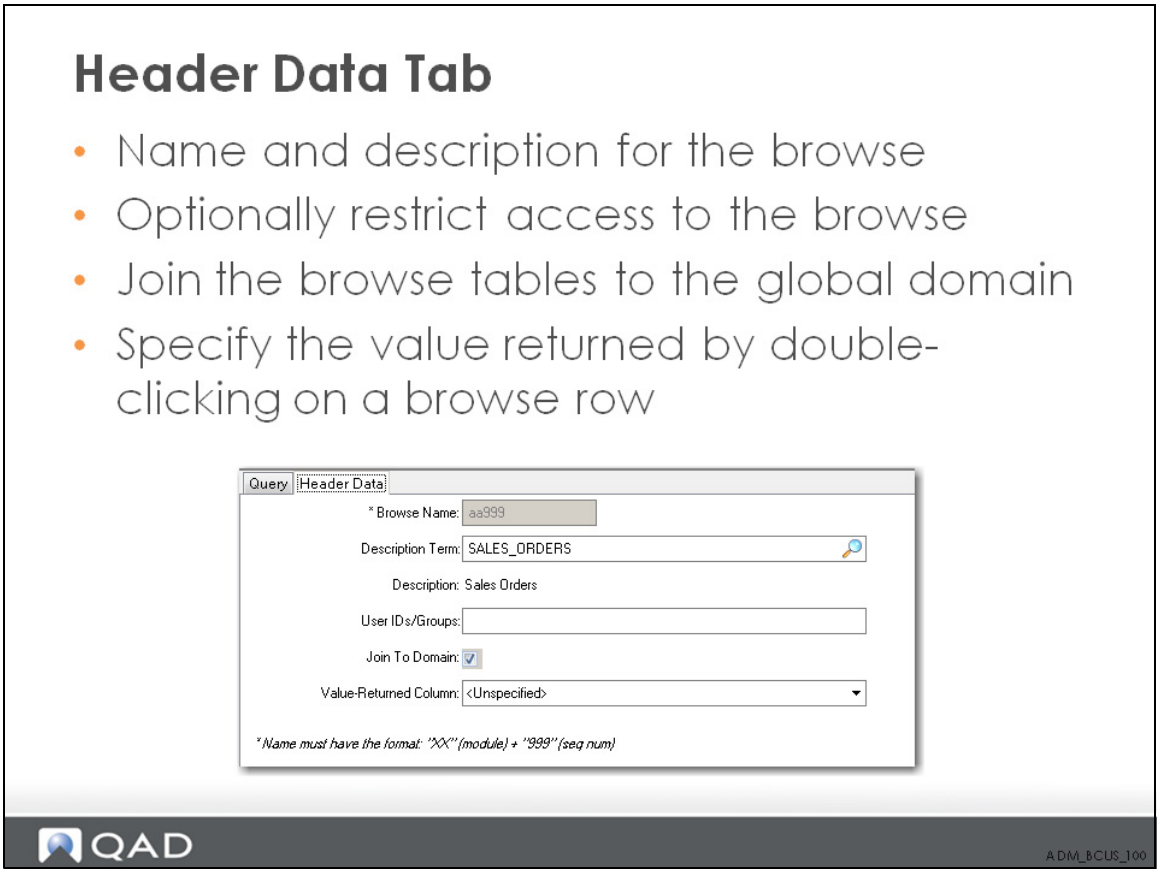
The label term field specifies the key or label term from the label master table which is used to retrieve the field label displayed in the column in the browse results.

When saving the browse definition:

If the label term does not exist in the label master table, the system creates a new label master record using the string entered (the string is set to all uppercase and spaces are replaced with underscores).

The new label master record's value is the entered label term. For example, if you enter the new term `Red Book`, the label master table is queried and the term is not found. A new label master record is created with the key `RED_BOOK` and the value `Red Book`. An associated lookup allows the user to select an existing label term from the label master table.

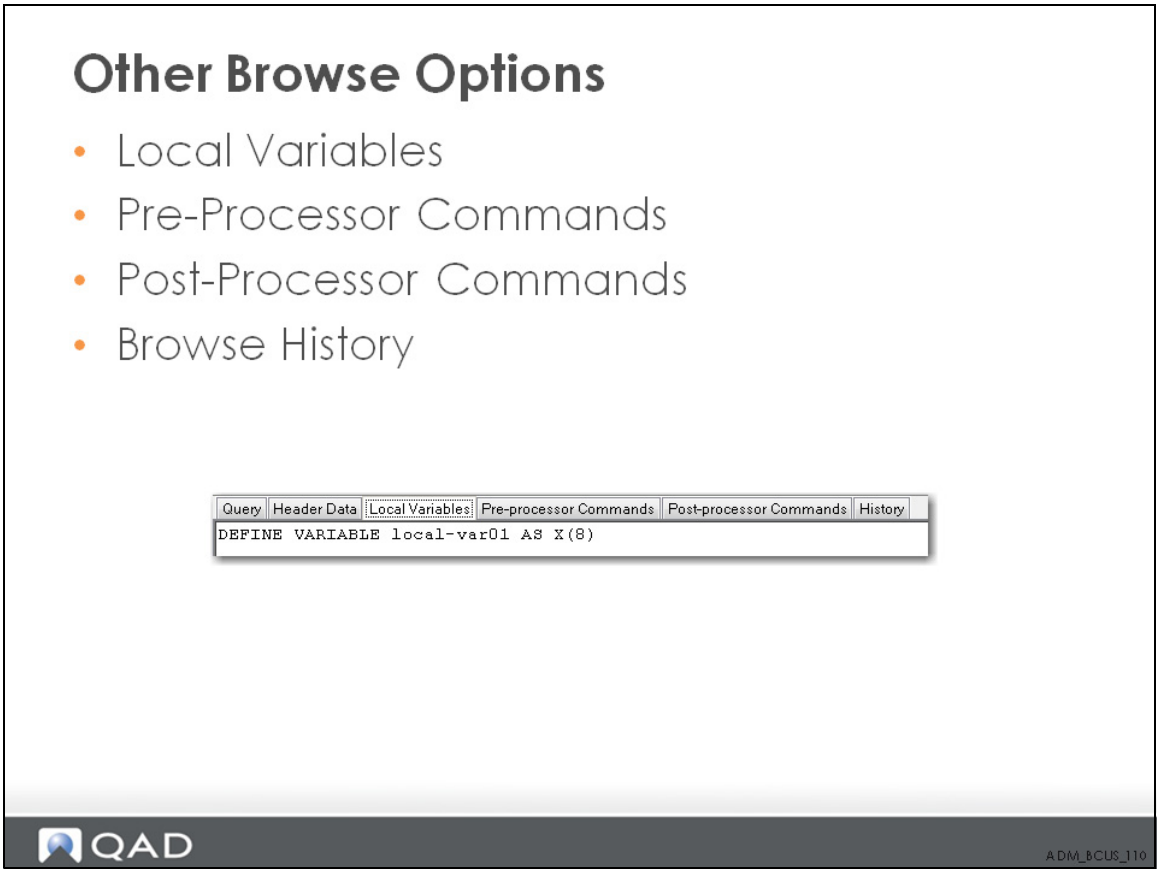
Header Data Tab



Roles in Enterprise Edition are the equivalent of user groups in Standard Edition. You use the same User IDs/Groups field to define access to browse functions in both applications.

If your role or user group has not been specified in the UserID/Groups field on the Header Data tab, you can run the browse but cannot open the browse in Browse Maintenance. You can also specify roles or user groups in the authorized user list for the Browse Maintenance Import, Export, and Multiple Delete functions.

Other Browse Options

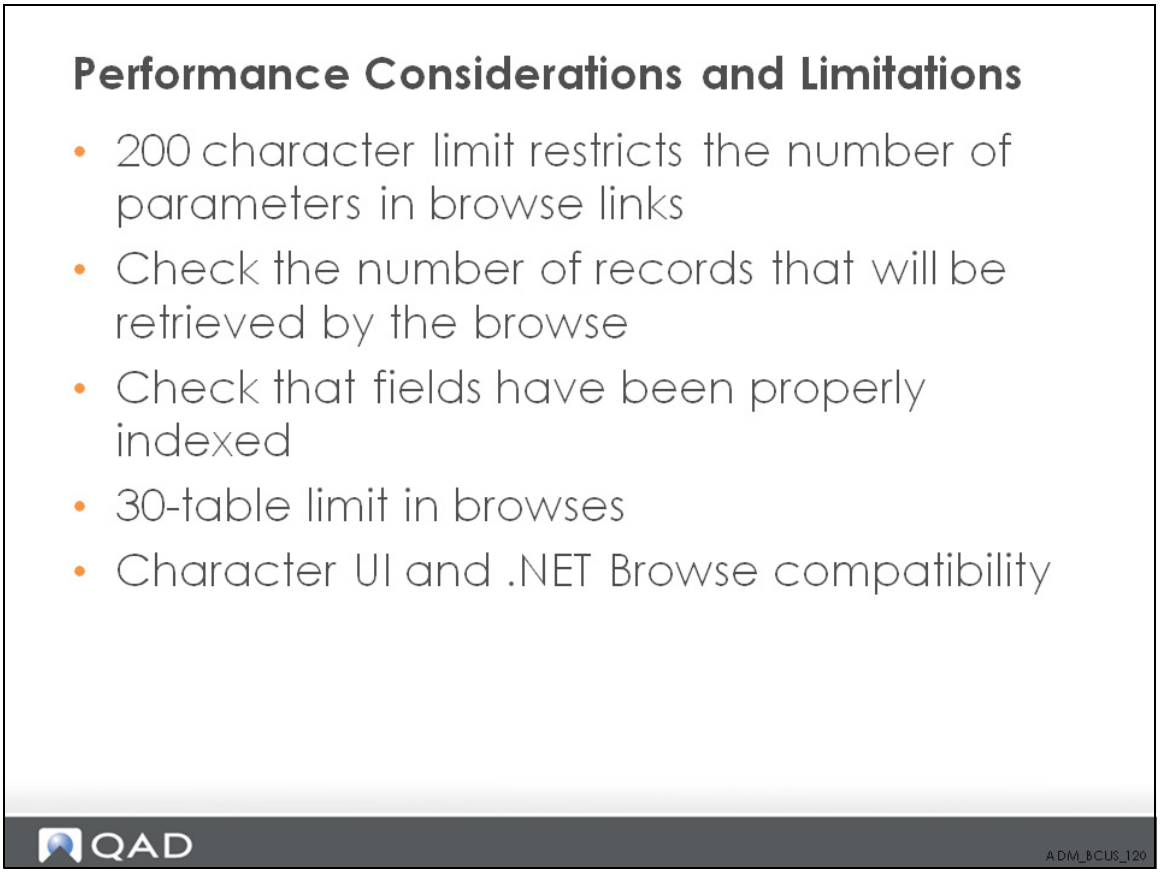


Right-click the Header Data tab to include the Local Variables, Pre-processor Commands, Post-processor Commands, and History tabs.

The Pre-Processor Commands and Post-processor Commands tabs are available only for backwards compatibility with browses defined using the Character UI. These tabs provide a way to enter Progress 4GL code that can run either before (pre-processor) or after (post-processor) the browse runs. You do not need to use these tabs when creating a new browse using the QAD .NET UI.

The History tab displays revision history for this browse.

Performance Considerations



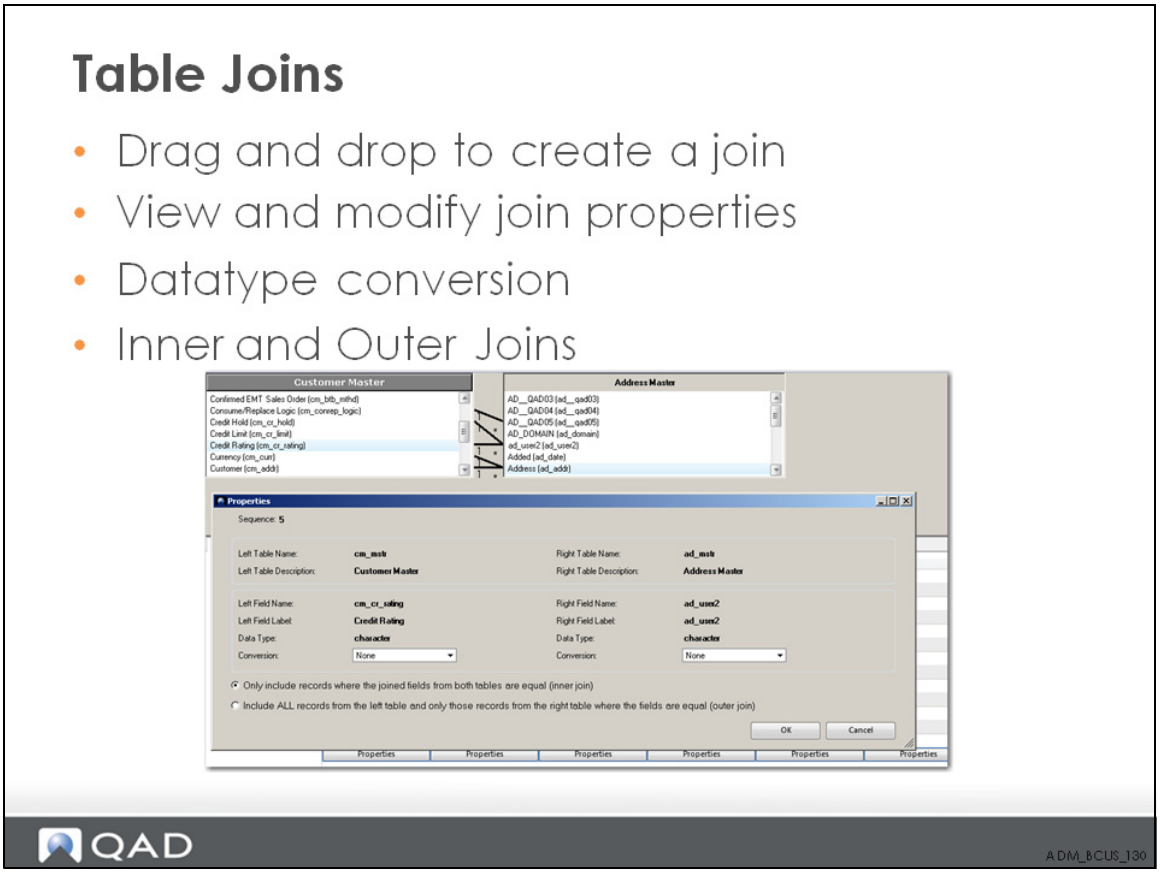
A browse on a database table that has a great many records may take a long time to save and hours to run. System resources are also strained when you select fields as search criteria that have not been properly indexed.

You should therefore consult the data dictionary before defining a browse, to check the number of records being retrieved by a browse. You should also check that the selected fields have been indexed.

There is no limit to the number of tables you can include using the .NET UI Browse Maintenance, but including more than 30 tables in a browse definition can cause the .NET UI Browse Engine to halt. The Browse Engine was originally designed with a four-table limit to avoid Progress performance issues. The Character UI Browse engine and Desktop Browse engine have four-table limits.

Although all browses created by Browse Maintenance (.NET User Interface) can be maintained in the Character UI, some legacy browses defined using the Character UI might not be maintainable by Browse Maintenance (.NET User Interface). In the Character UI, you create a browse by entering data in two maintenance programs, View Maintenance and Browse Maintenance. You have to enter the join data in View Maintenance's Join Phrase field, where *join data* is a clause of the form `<from table>.<from field> = <to table>. <to field>`. However, more than just join data can be entered in View Maintenance's Join Phrase field. For example, you can include field filters of the form `<field name> <operator> <value>`. Browse Maintenance (.NET User Interface) only supports maintaining join data.

Table Joins



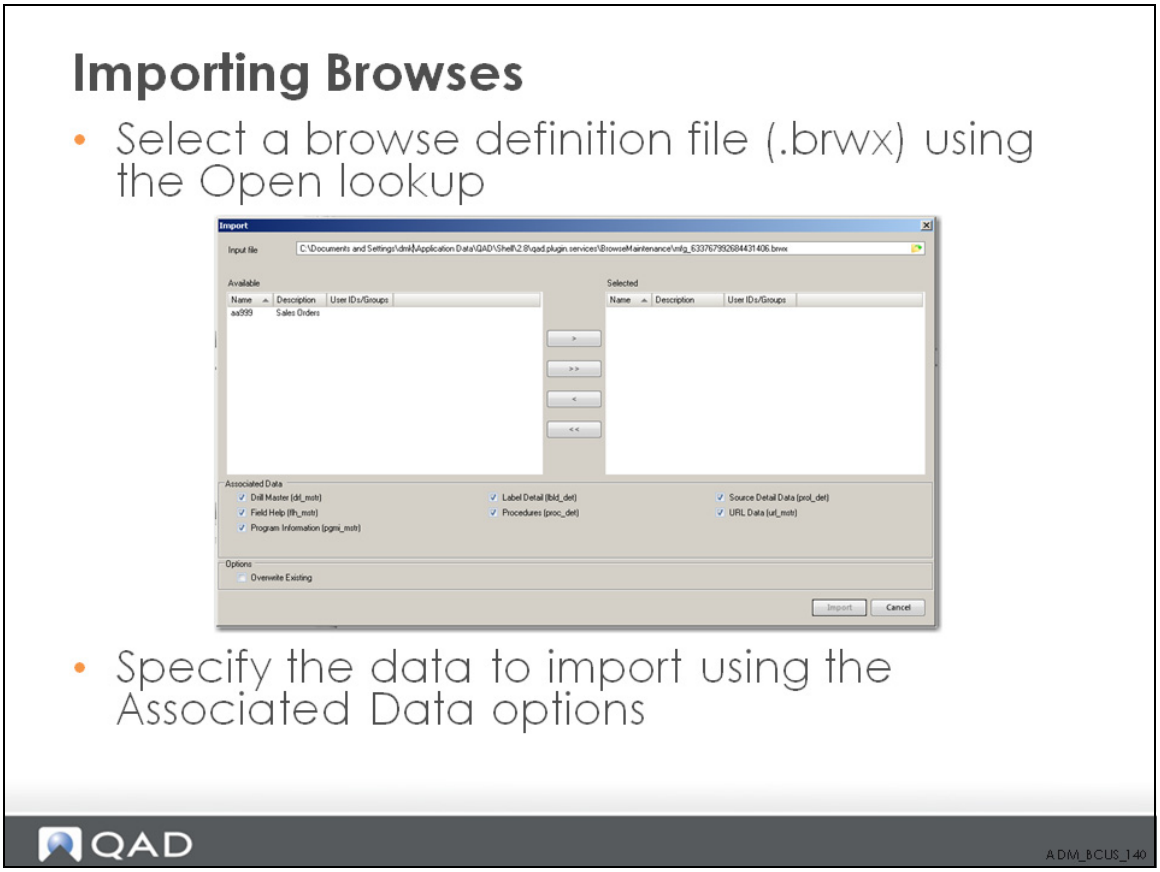
An inner join returns the records selected for the first table combined with related records selected from the second table. If a record does not exist in the second table, no records are returned. Only related records selected from both sides of the relationship display in the view.

An outer join returns the records found by an inner join. However, in addition, for each value in the first table, it returns unknown values from the second table when no related record is found. As a result, all matching records from the first table are preserved for unmatched records in the second table.

The default join type is inner. Using the outer join can give you more flexibility in displaying information.

Example An inner join between customers and sales orders displays only customers with sales orders. An outer join includes all customers, even those who do not have orders.

Importing Browses

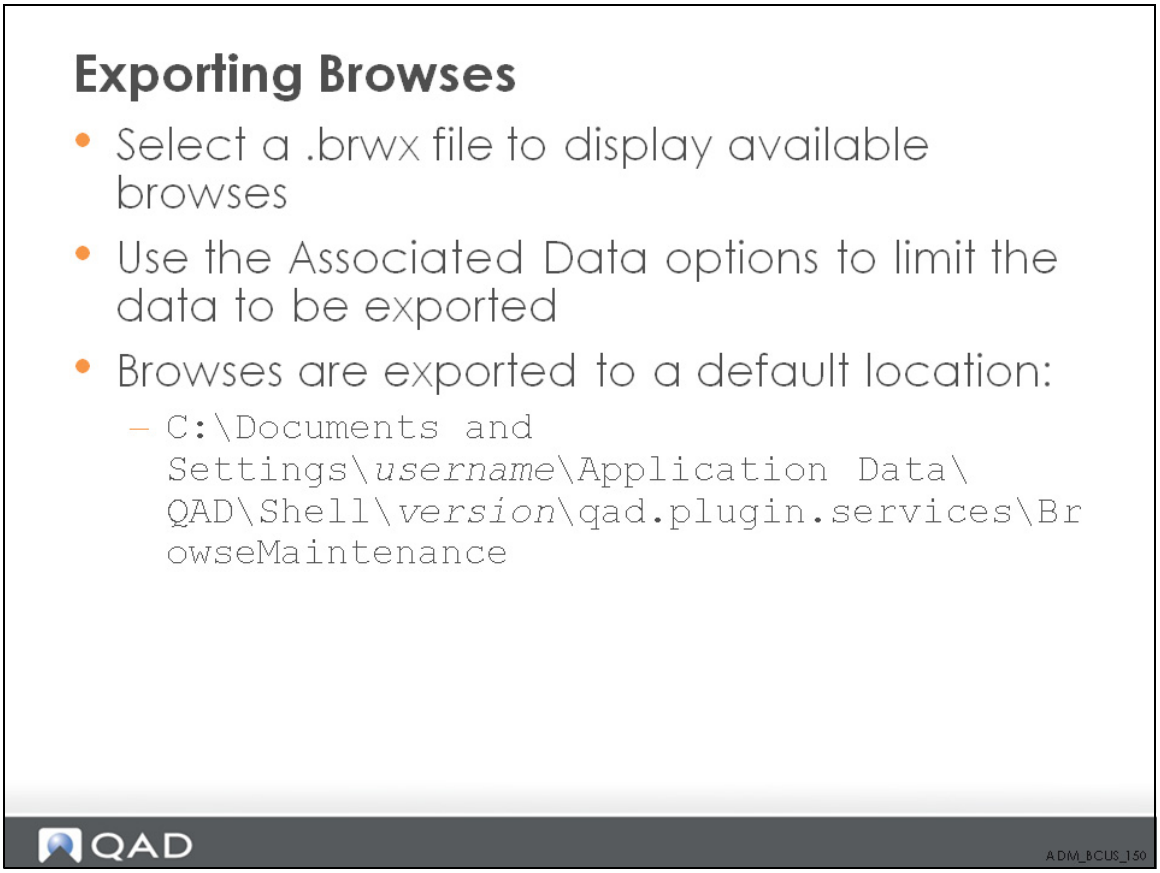


Importing includes the browse and view data for the browse, but you can specify whether to include associated browse data in the Associated Data pane, which includes checkboxes for including the Drill Master, Field Help, Program Information, Label Detail, Procedures, Source Detail Data, and URL Data.

If you are importing a browse that has the same name as an existing browse, specify whether you want the system to replace the existing browse with the one you are importing by choosing the Overwrite Exiting checkbox in the Options pane. Finally, click the Import button.

The Import and Export functions requires that you are using Progress version 10.1C01 at a minimum.

Exporting Browses

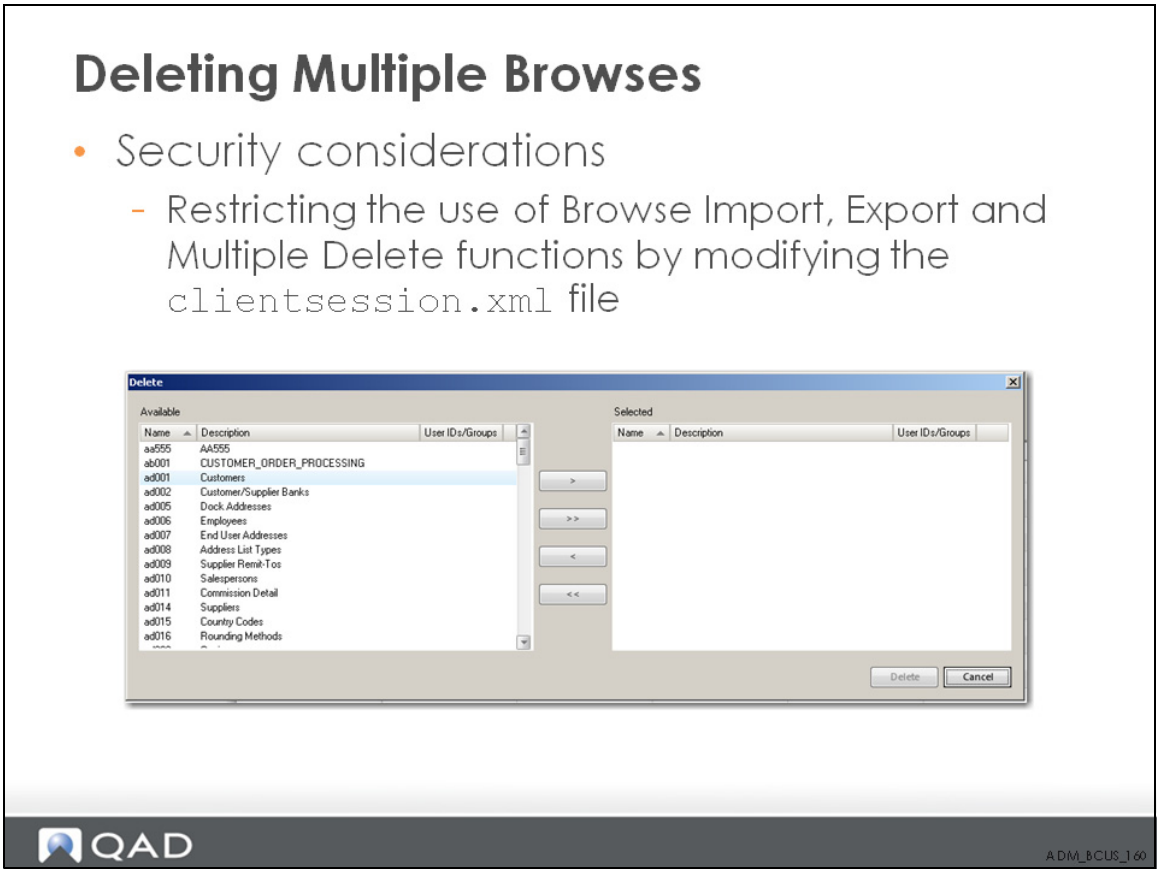


The ability to export, import, and delete browses is disabled by default and should be limited to authorized users.

The `client-session.xml` file (located in *`TomcatInstallDir`*`/webapps/qadhome/configurations/`*`SysEnv/`*) now includes a setting for authorizing access to the import, export, and delete features.

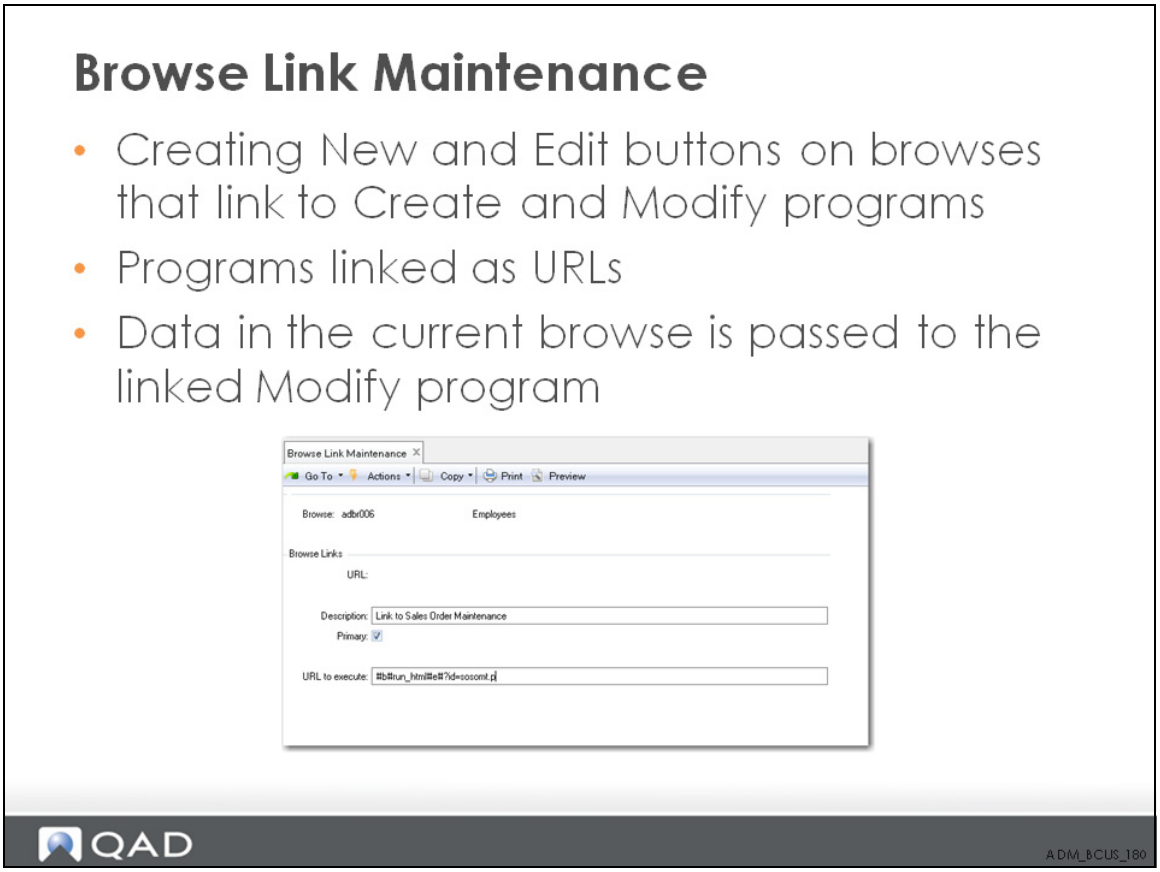
A new `<DotNetBrowseMaintenanceUtilities>` element includes a `<Utility>` element whose attributes specify authorization.

Deleting Multiple Browses



Deleting will remove the browse and view data along with the associated data.

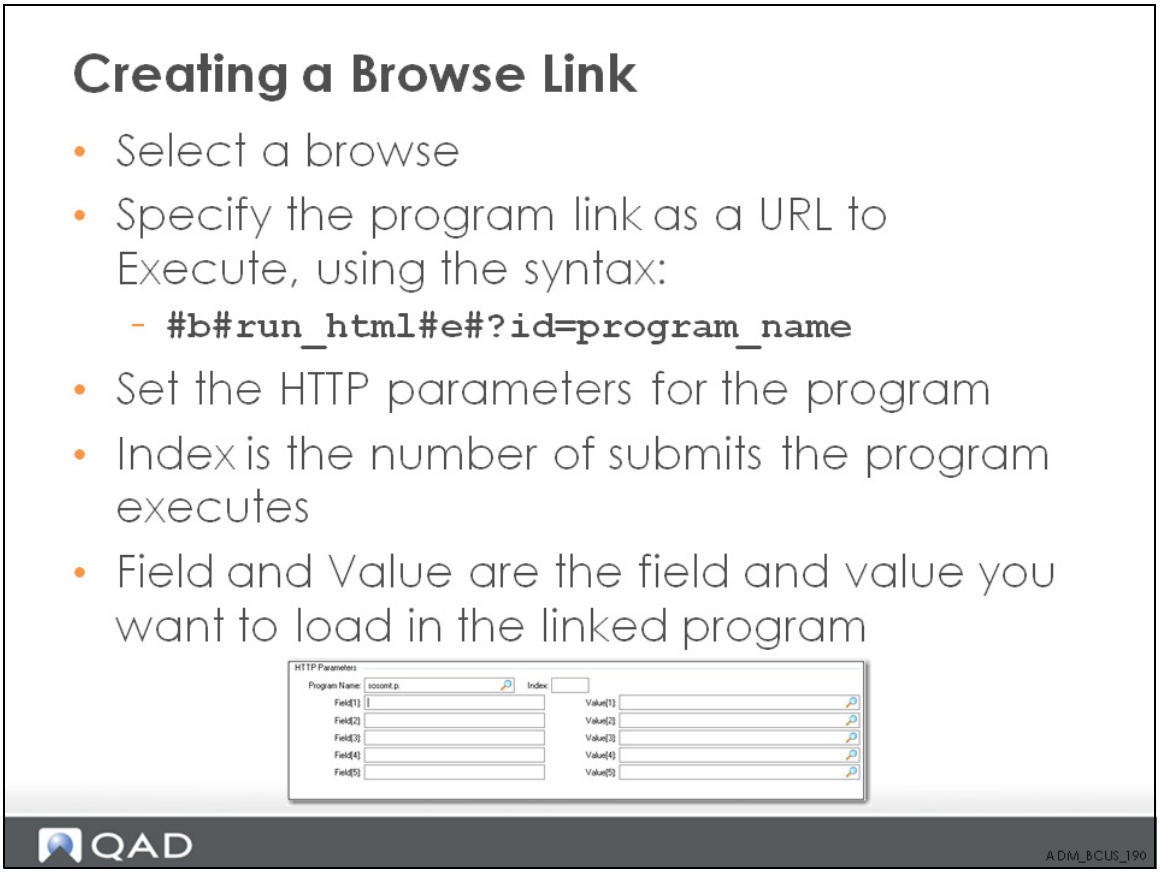
Browse Link Maintenance



The New and Edit buttons provide browse program links. When you click on a browse program link Edit button, data from the currently selected row in the browse will be passed to the linked program.

For example, in Sales Order Browse, click Create to open Sales Order Maintenance to enter a new sales order. Click Edit to open Sales Order Maintenance to modify the order for the currently selected row in Sales Order Browse.

Creating a Browse Link



The index field is used to store the number of times the program will execute an Enter action (similar to pressing the Next button).

In simple maintenance programs, this is set to 1 to simply enter the key field values and access the fields that can be maintained in the linked record.

For more complex maintenance programs, there may be multiple sets of input prompts to be processed to access the frame of maintainable data.

For example, the first prompt for data in `addkmt.p` requires a value for the field `Shipto`. The program link record provides the value of `ad_ref` from the browse and executes the first Enter action.

The next prompt for data in the maintenance program requires a value for the field `ad_addr` and the browse link provides the value of `ad_addr` from the browse and executes a second Enter action. This advances the maintenance program to its frame of maintainable data for the user. Each time the program asks for data to be entered, the browse link logic offers up the fields it has and if there is a match between the field names it has data for and the fields the program is looking for, the field value is provided and an Enter action is executed (if there are any left to execute).

Use the Field field to enter the name of the variables that the target program is using to prompt for data. This information can be found by executing the desired program, advancing the cursor into the desired fields and pressing Ctrl-F.

The value fields (Value[1], Value[2], etc.) are the variables names from the browse providing the data and must be contained within `#b#` and `#e#`. The browse link logic uses these tags to parse out the value of the field from its record buffer.

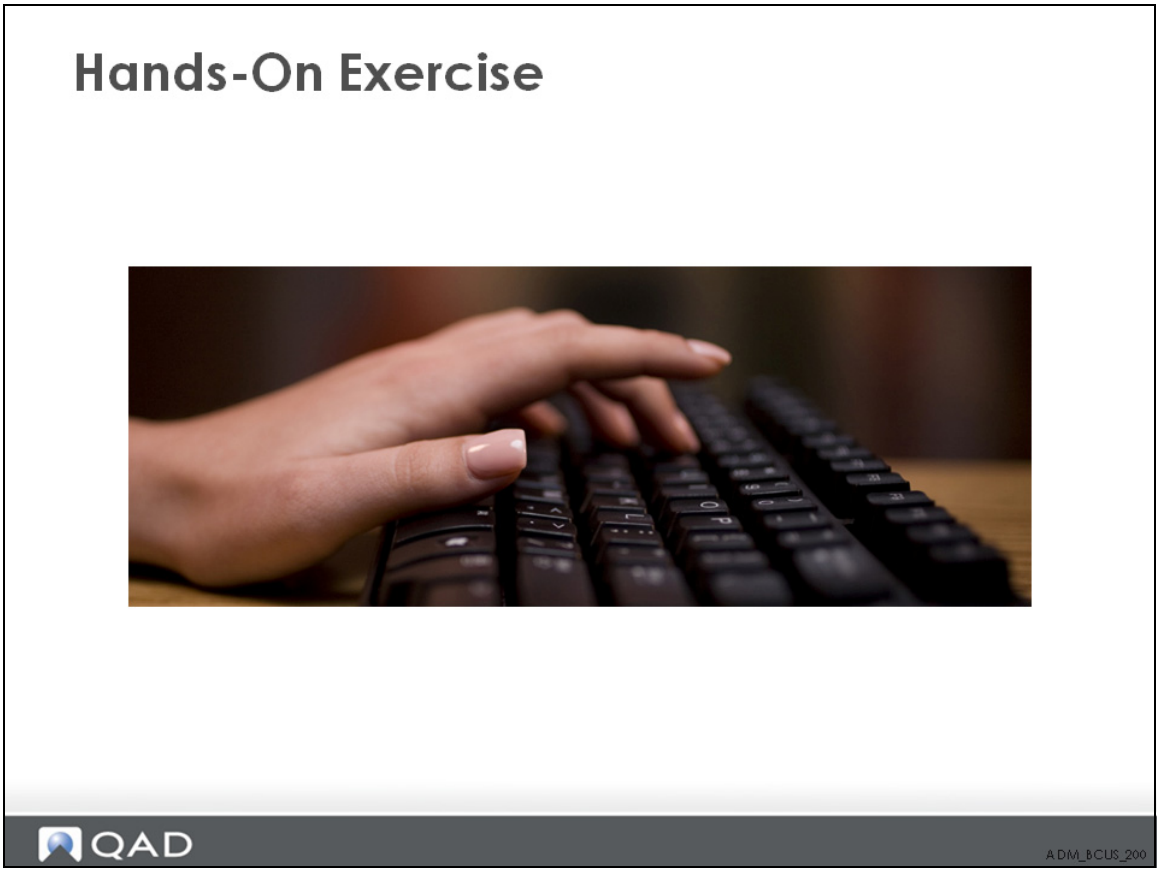
Example

Field[1]: shipto; Value[1] : `#b#ad_ref#e#`

Field[2]: ad_addr; Value[1] : `#b#ad_addr#e#`

Important Progress has a limit in the size of the data that can be stored in an index. In versions prior to 10.1B, the limit is around 200 characters (the sum of all the data contained in the fields of an index of a record). This limit has been increased to around 2000 characters in version 10.1B and beyond. Within Browse Link functionality, you are restricted to the 200-character limit unless you have upgraded your version of Progress. This limits the number of parameters that can be defined in a browse link, usually to four or less, although a fifth parameter is possible if the names of all of the involved fields are small.

Browse URL Maintenance

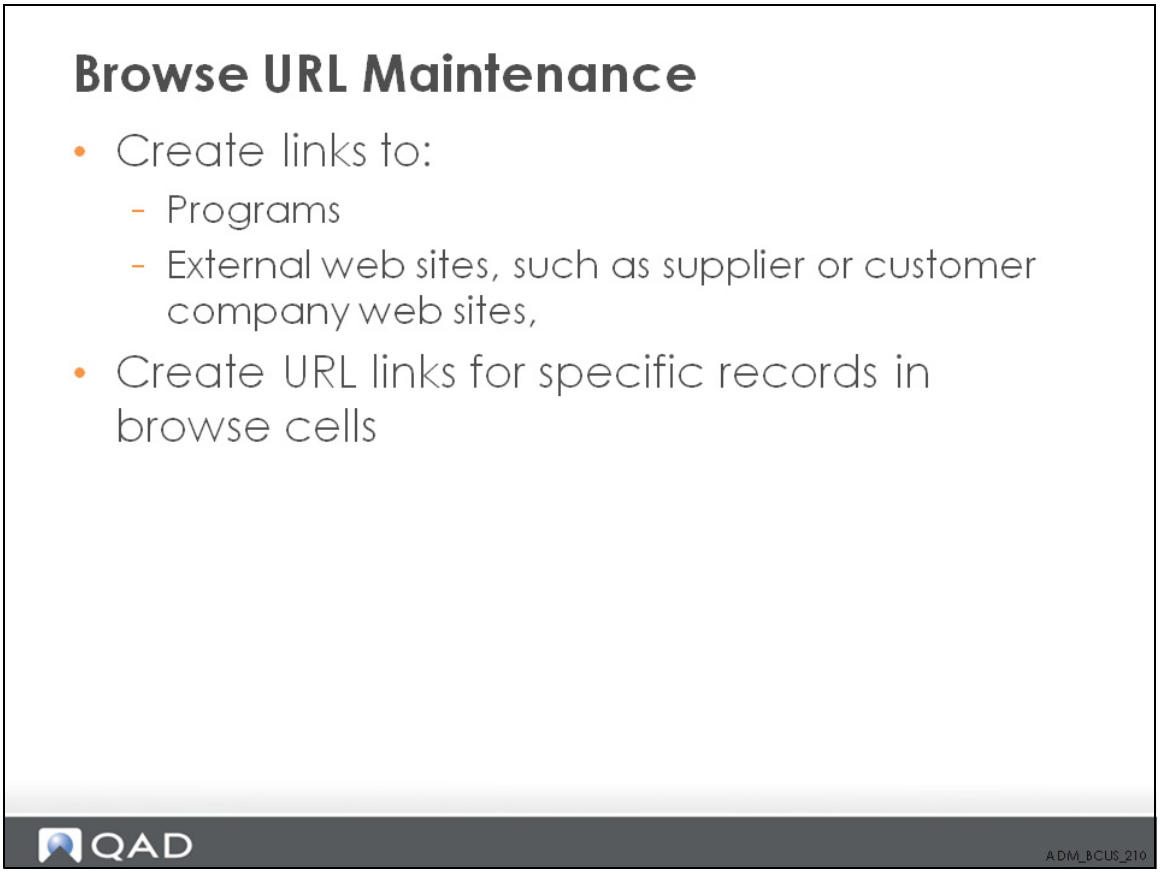


When a browse cell contains a URL link, double-clicking it launches a new browser window and displays the intranet or Internet resource associated with the URL. You can use these URLs in two ways:

- Create links to external Web sites that users can activate from QAD .NET browses, such as a supplier Web site associated with a supplier ID.
- Create links to other programs and pass specific data values to the programs. This lets you use browses as a means of navigating directly to maintenance programs.

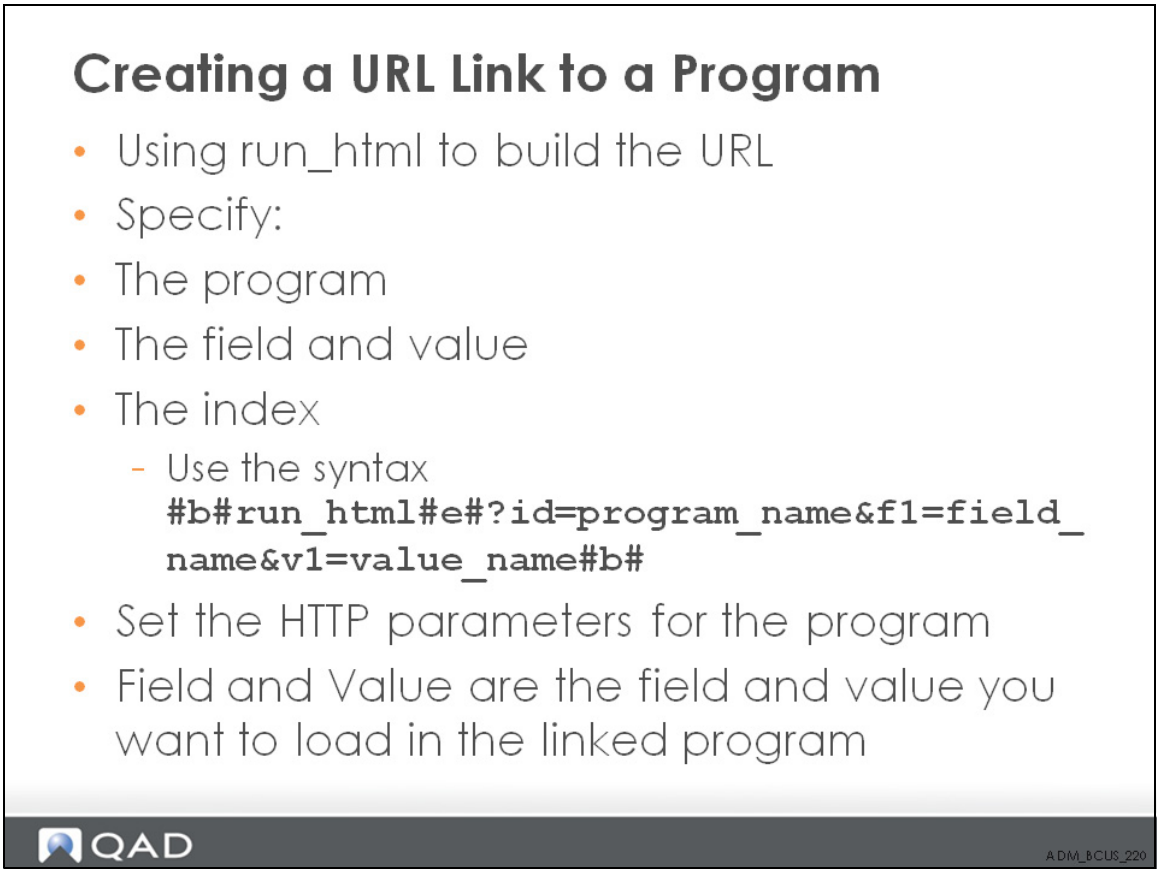
You can access links to other programs only from drill-down browses, not lookups. Drill-down browses are typically available directly from the menus, but can also be associated with program fields in Drill Down/Lookup Maintenance (36.20.1).

Creating a Browse URL Link to a Program



Example For example, you can set up links in an item browse to directly access Item Master Maintenance (1.4.1), passing the current item number to the maintenance program, and executing the Next command any number of times. When a user clicks the link, Item Master Maintenance displays in a detached window. Multiple columns of data in a browse can contain links so that you can access maintenance programs for any data related to a record. However, data for only one field can be passed to each program.

Creating a Browse Link to a Web Page



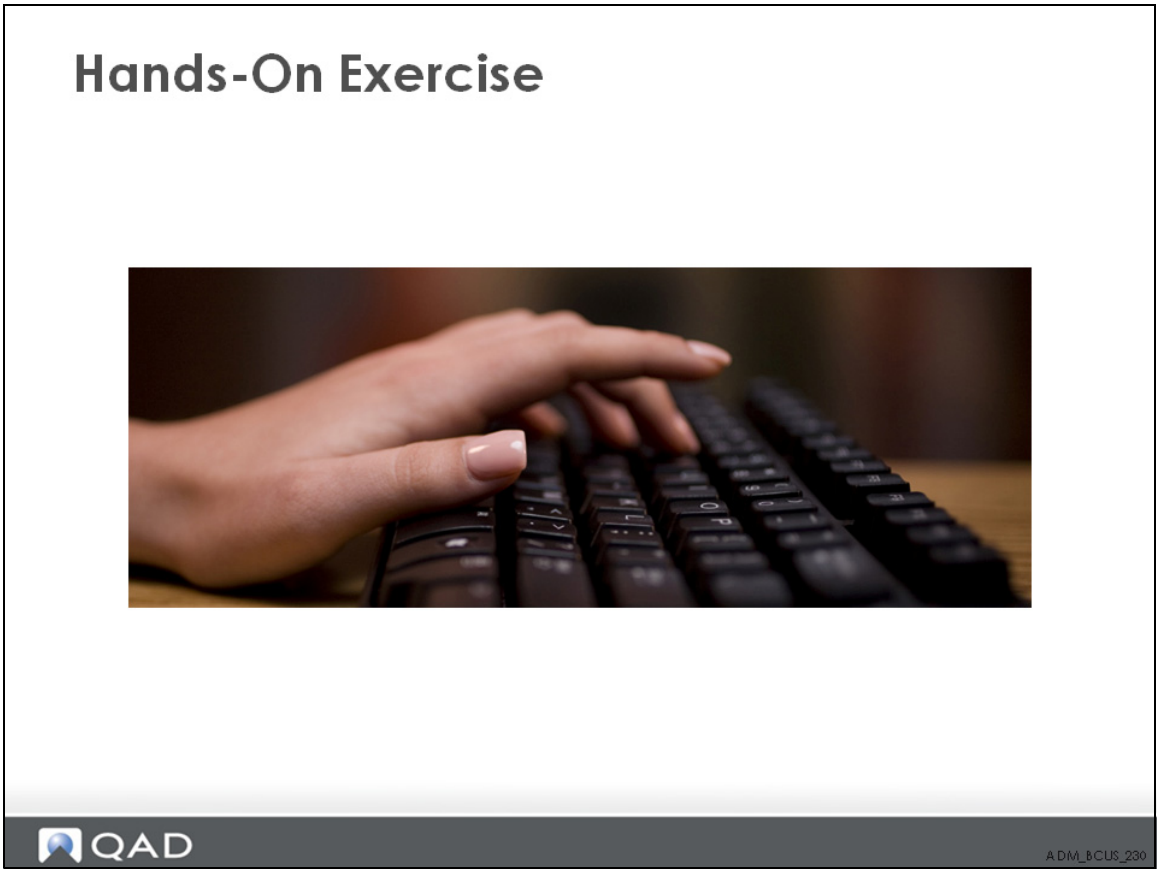
Example You want to establish a URL link in the Purchase Order Browse from supplier ID GS10100 to the corresponding supplier's company Web site, located at http://www.generalsupplies.com.

Enter these values in Browse URL Maintenance:

Field Name	Value
Browse	`pobr006.p`
User ID	*
Field Name	`po_vend`
Value	gs_10100
URL	`http://www.generalsupplies.com`
Description	General Supplies Web Site
Primary	Yes

When you run Purchase Order Browse, the supplier gs_10100 record now features a link to the website `www.generalsupplies.com`.

Creating a Browse Link to a Record



URLs can contain special strings that are automatically replaced by field values in the browse.

Selecting a link containing this type of string automatically replaces that string with the corresponding field value in the row.

Follow these steps to define this type of special string in a URL:

1. Enter `#b#` to indicate the beginning of the string.
2. After the `#b#`, enter a field name associated with the specified browse.
3. Enter `#e#` to indicate the end of the string.
4. The Web site for one of your primary suppliers contains a catalog of items. Entering an item's identifier at this Web site accesses the catalog entry for that item, containing information such as item cost, quantity available, and ship weight. To create links from the supplier item numbers to their corresponding catalog entries at the supplier's Web site, create the following URL: `http://www.generalsupplies.com/catalog/#b#vp_vend_part#e#`

   Note You must include `http://` in the URL. For example, you must use `http://www.generalsupplies.com/` and not just `www.generalsupplies.com`.
5. Next, associate the URL with the Supplier Item column in the Supplier Item Browse.

6 After you establish this link, selecting a supplier item number in the Supplier Item Browse automatically inserts the selected field value. For example, selecting supplier item 10-1005 creates this URL: `http://www.generalsupplies.com/10-1005`.

7 The system then launches a Web browser to display the relevant catalog information for that item located at that URL address.

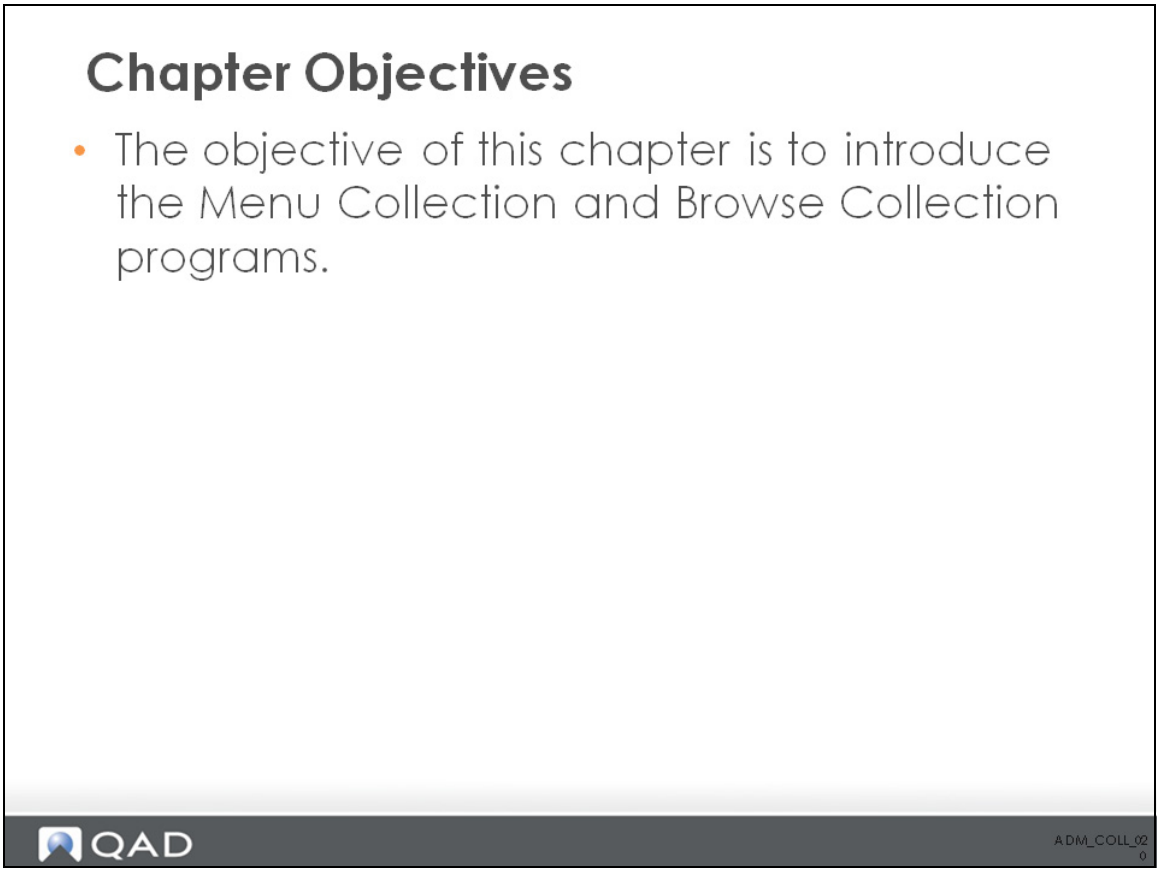
Exercises and Knowledge Check

1. What is the recommended upper limit of tables you can include in a browse definition?
2. How do you restrict access to the Browse Import and Export functions?
3. What information should you check before creating a browse?
4. What is the file extension for browse definitions?
5. Which menu do you use to associated drill-downs with fields?

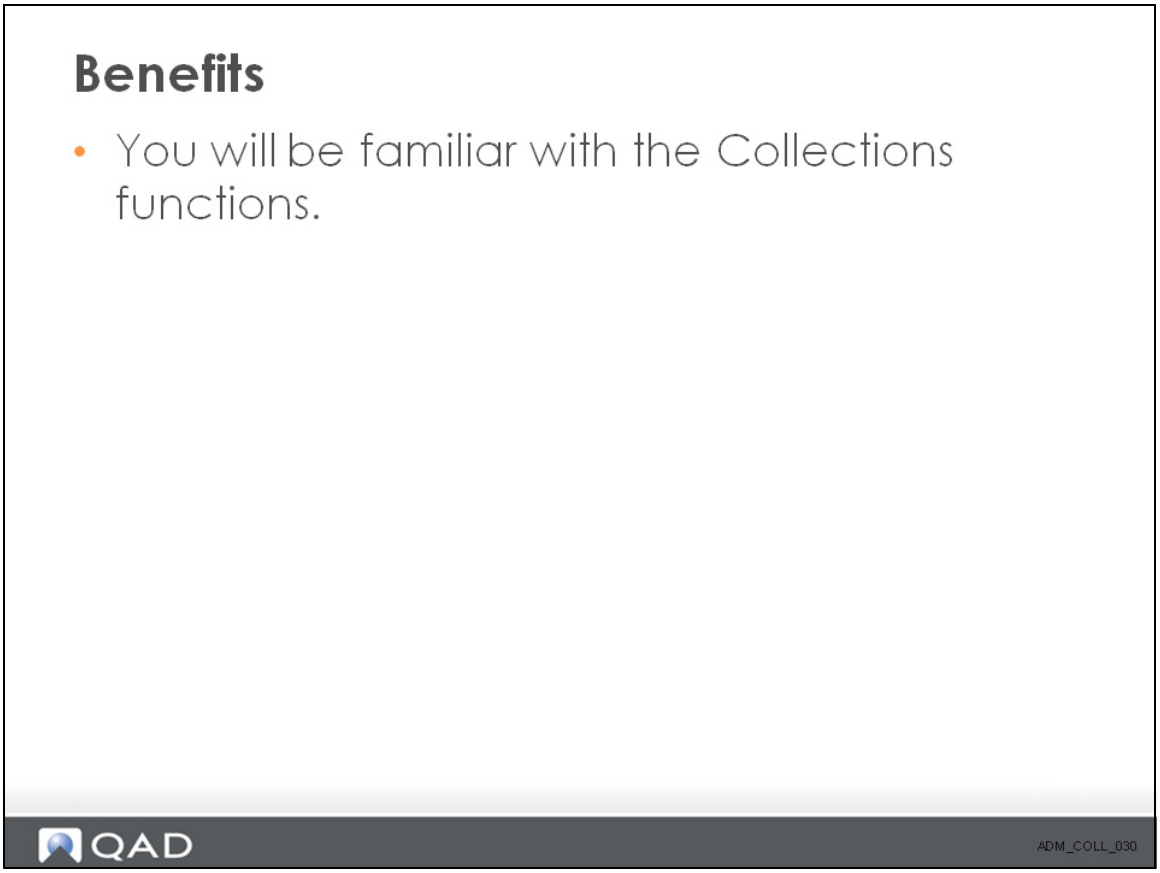
Chapter 7

Menu and Browse Collections

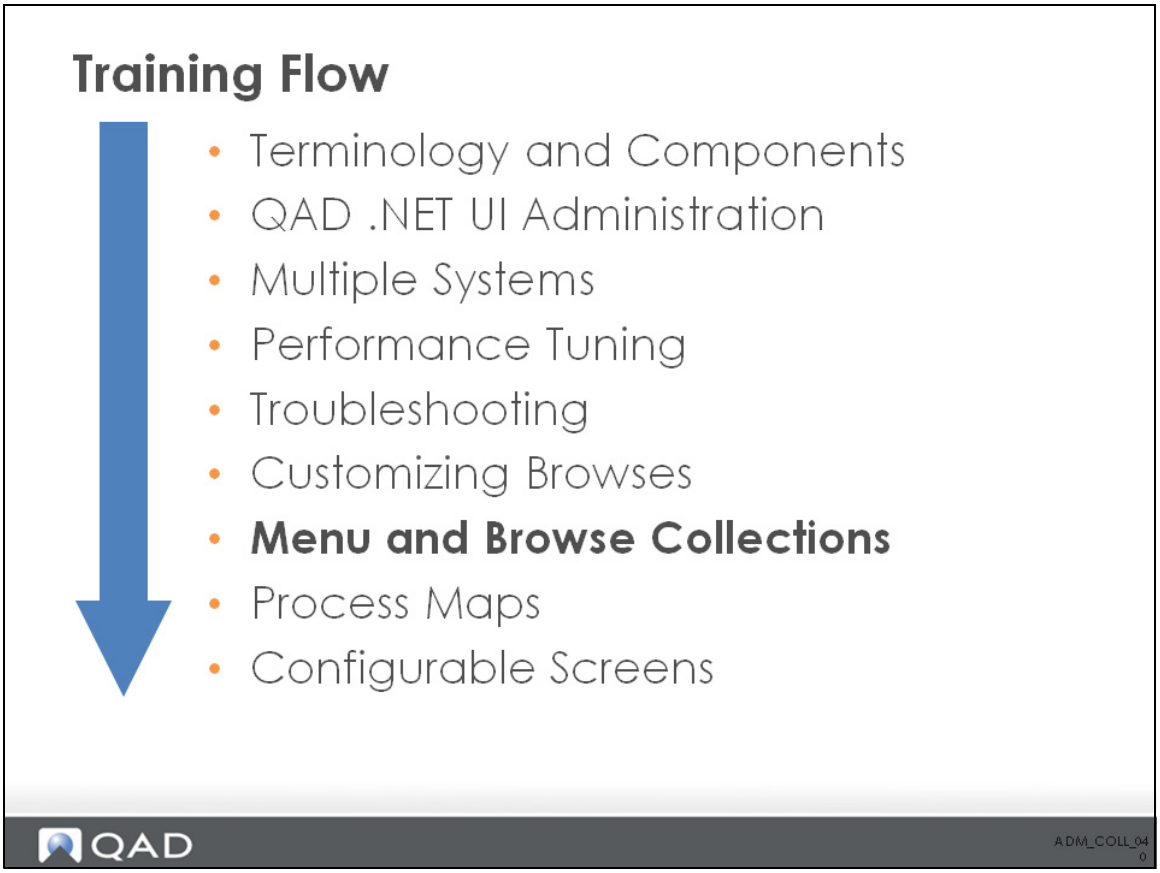
Chapter Objectives



Benefits


Benefits
• You will be familiar with the Collections functions.
QAD
ADM_COLL_030

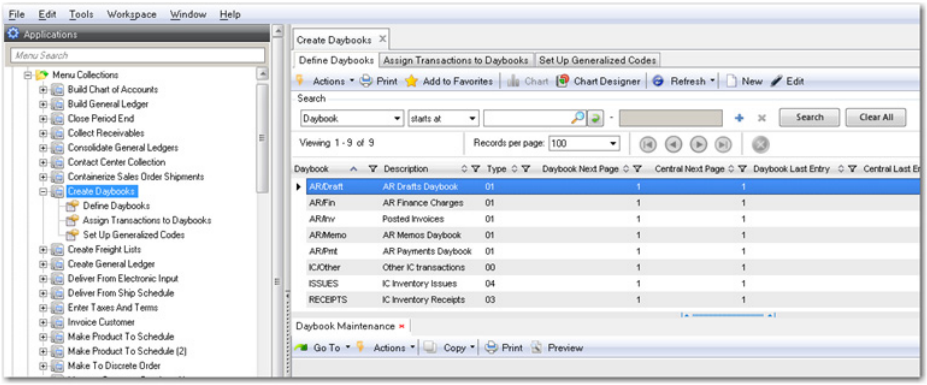
Training Flow



Menu Collections

Menu Collections

- Collections of menu items such as programs, browses, process maps, and dashboards
- Stored in the Collections folder
- Need access to Administration Menu

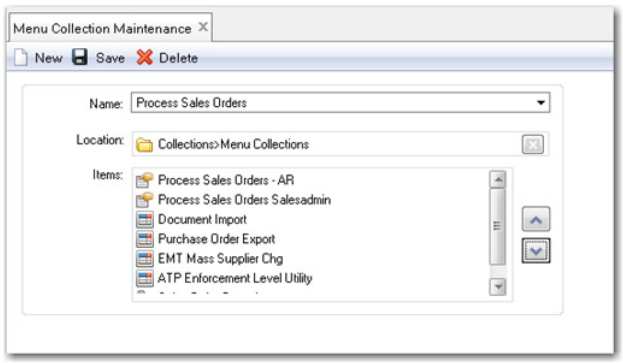


QAD

ADM_COLL_05_0

Menu Collection Maintenance

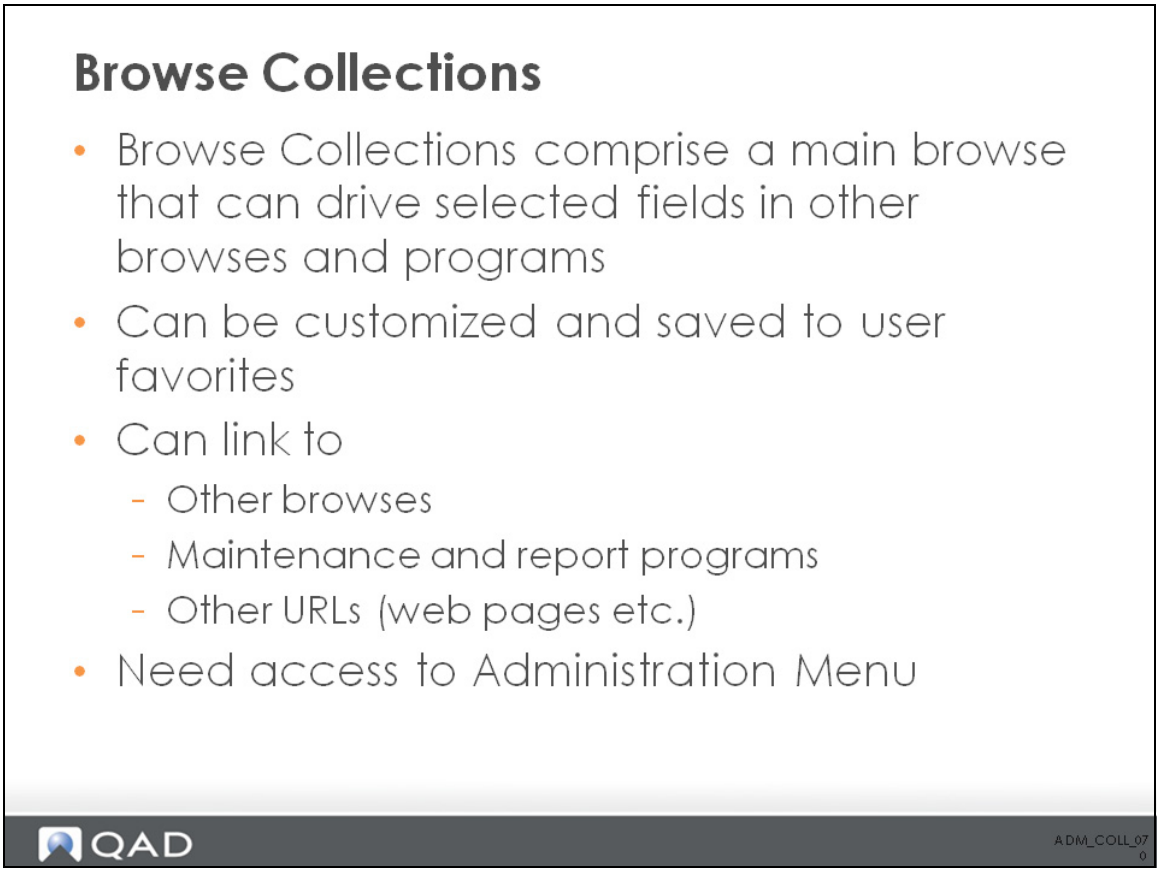
- Drag-and-drop facility for adding menus to collections
- Set the order of menus in the collection using the up and down arrows



QAD

ADM_COLL_06
0

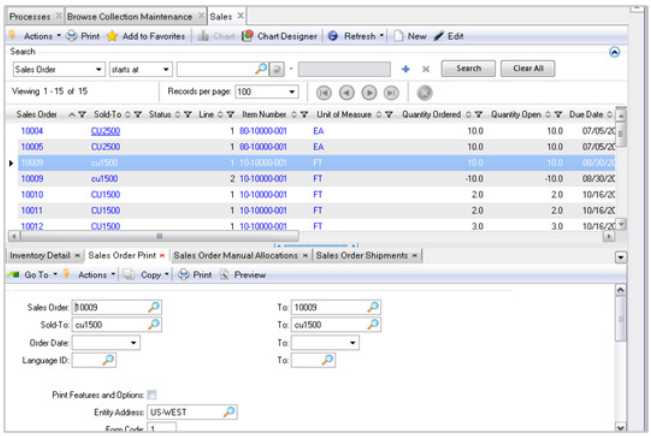
Browse Collections



There is no limit to the number of programs and browses you can include in a Browse Collection. However, when defining the collection, you should consider that a large collection takes longer to display on the screen, and there may be a performance issue if it is to be in constant use by a large number of users. In this case, you should consider multiple smaller collections.

Browse Collection Maintenance

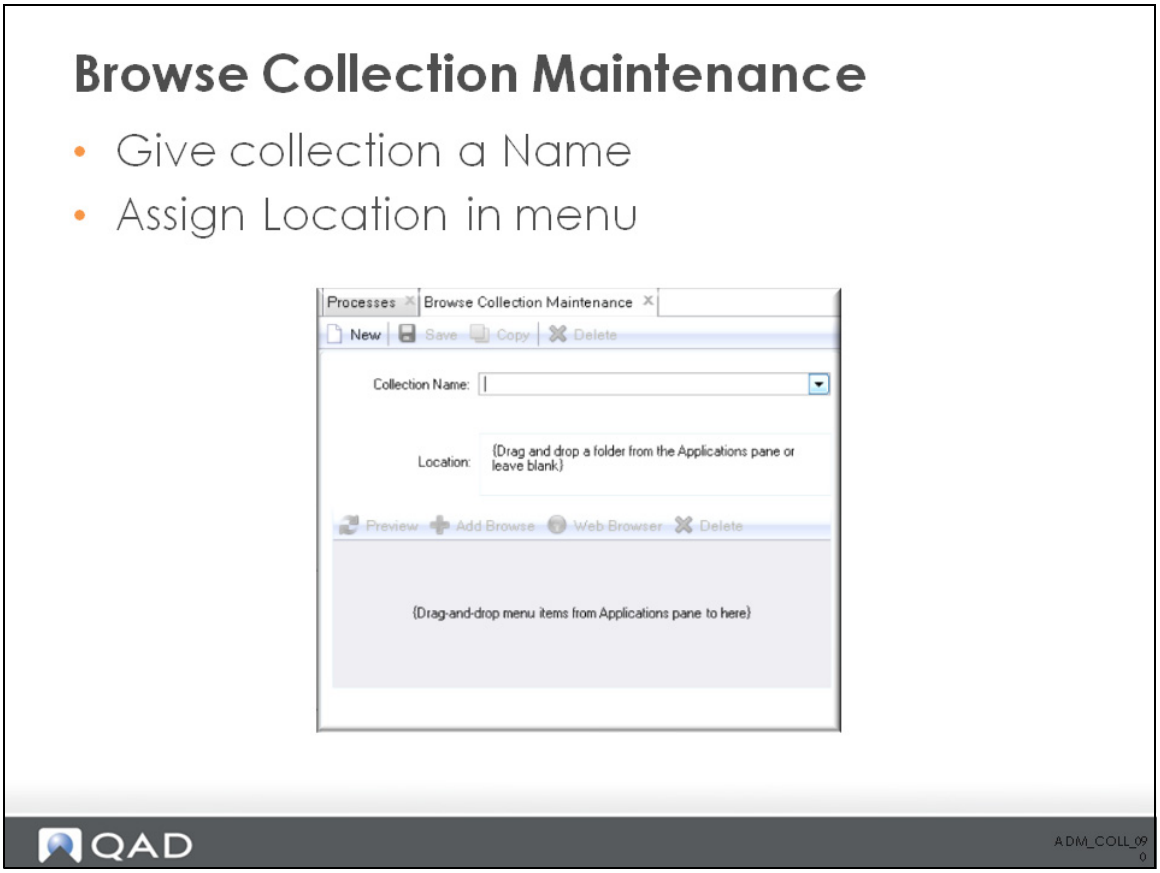
- Main browse in upper half of screen
- Related browses and programs in lower half



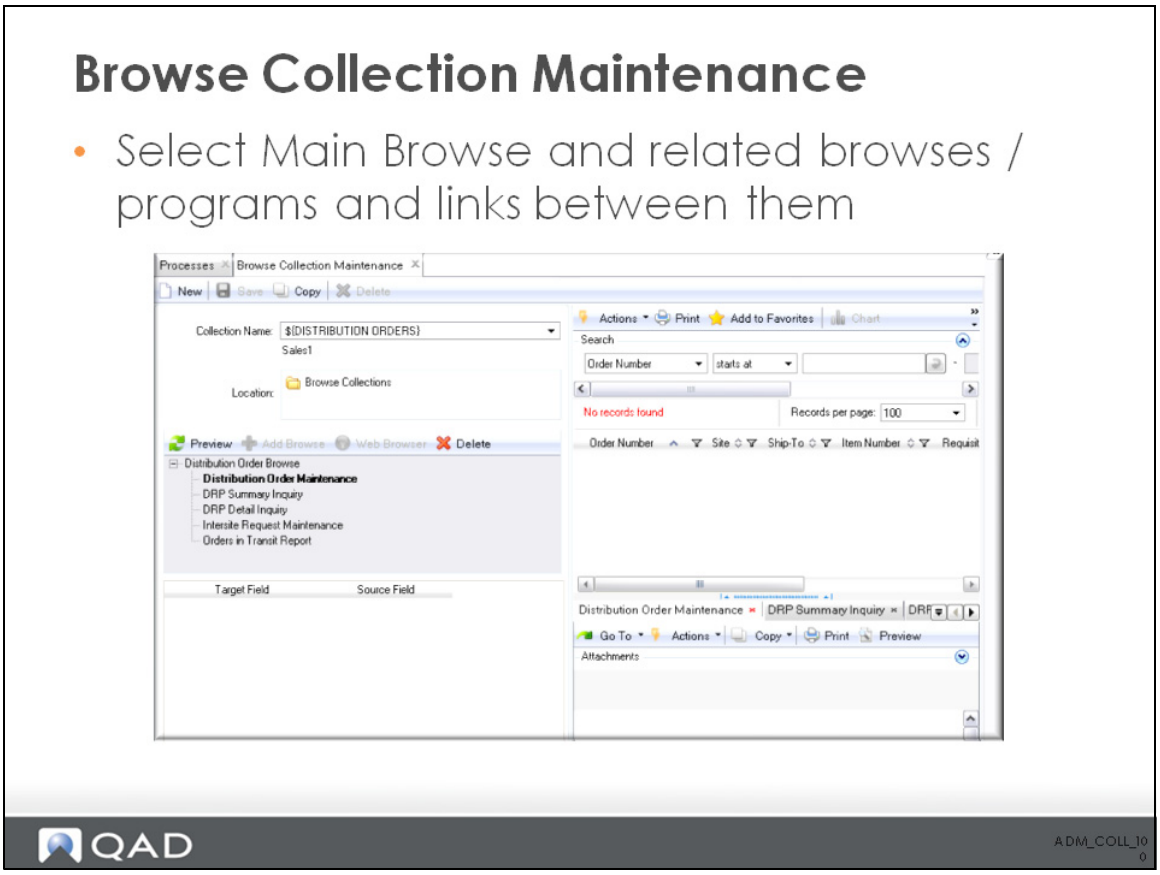
QAD

ADM_COLL_06
0

Browse Collection Maintenance



Browse collections are stored in the Collections folder in the Applications area. When you right-click the Collection name and select Design, you can open the collection directly in Browse Collection Maintenance. This option lets you modify collection properties from the desktop without having to run the maintenance program.



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.

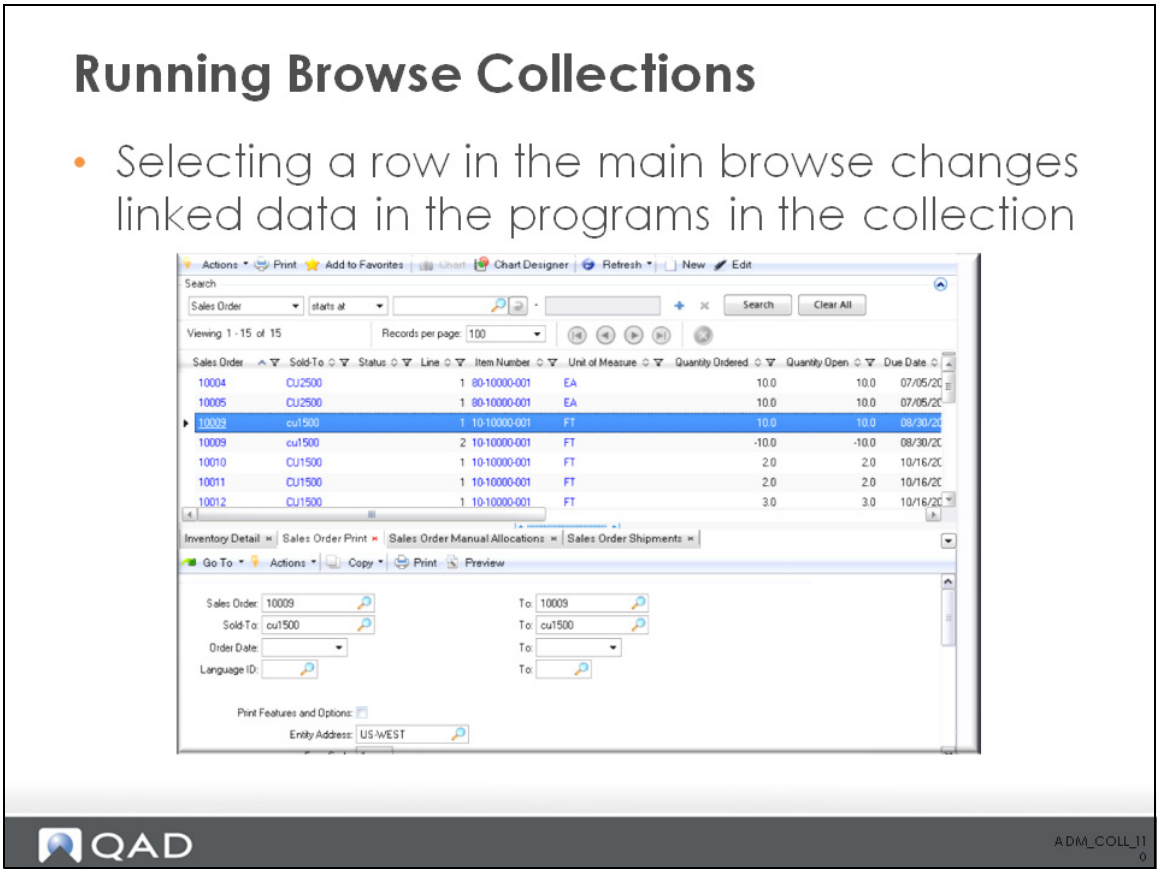
In the browse, the Term column lists the label terms that include Item and the Long Label column displays the associated descriptions. Next, in Browse Collection Maintenance's Name field, enter the label term in the format *`${Term}`*.

Important You must use curly brackets {} when defining a label term. Otherwise, the label will not link correctly to the translated description.

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 area's display.

Running Browse Collections



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

1 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.

2 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.

3 To preview the collection, click Preview.

Exercises and Knowledge Check

1 Where are menu and browse collections located in the Applications area?

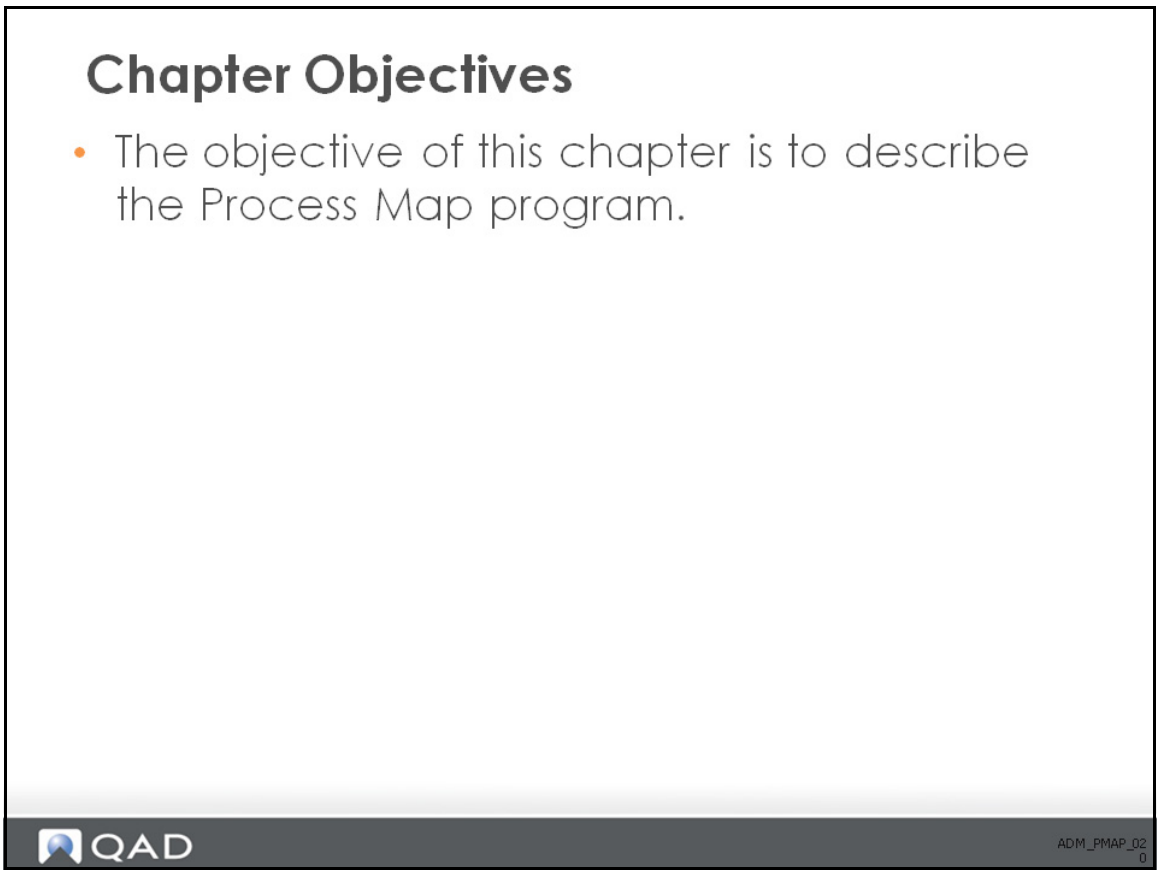
2 How do you edit a browse collection directly from the Applications area?

3 How many fields can be used as target fields?

Chapter 8

Process Maps

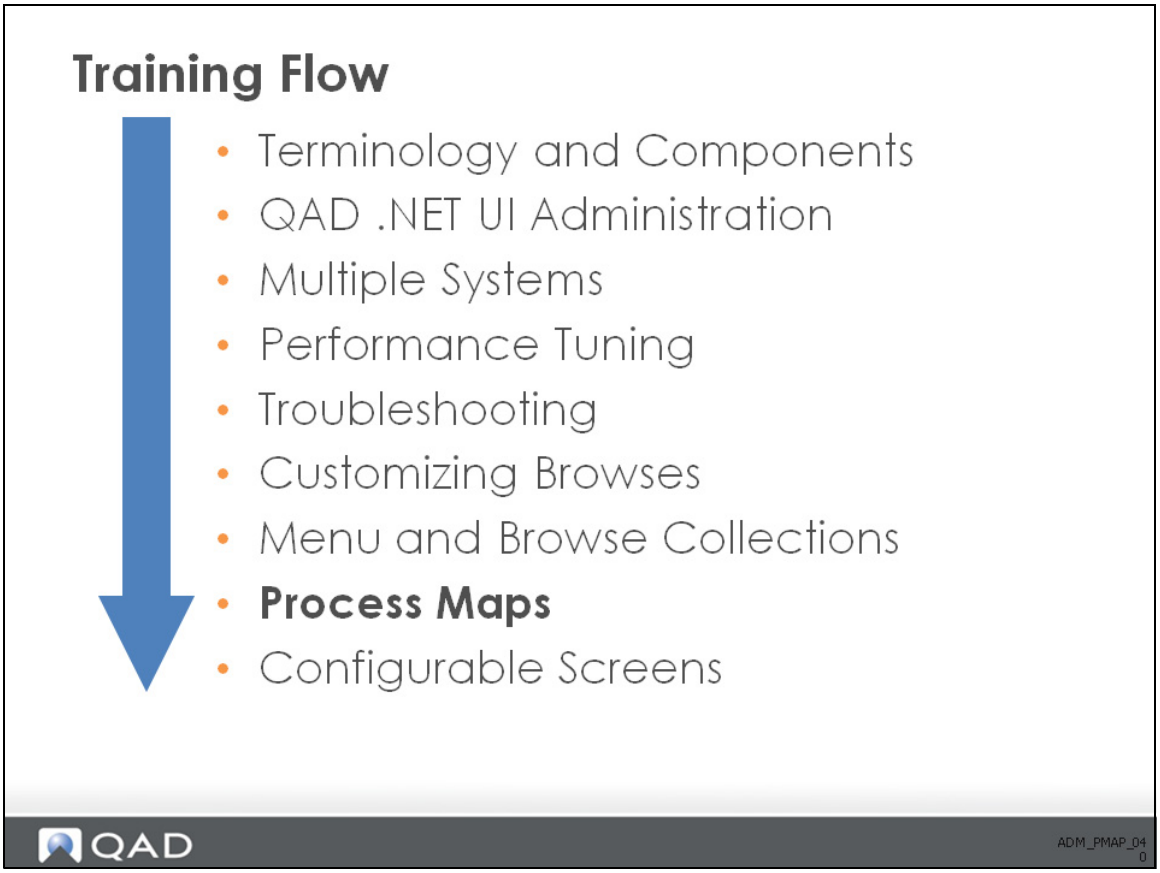
Objectives


Chapter Objectives
The objective of this chapter is to describe the Process Map program.
QAD
ADM_PMAP_02
0

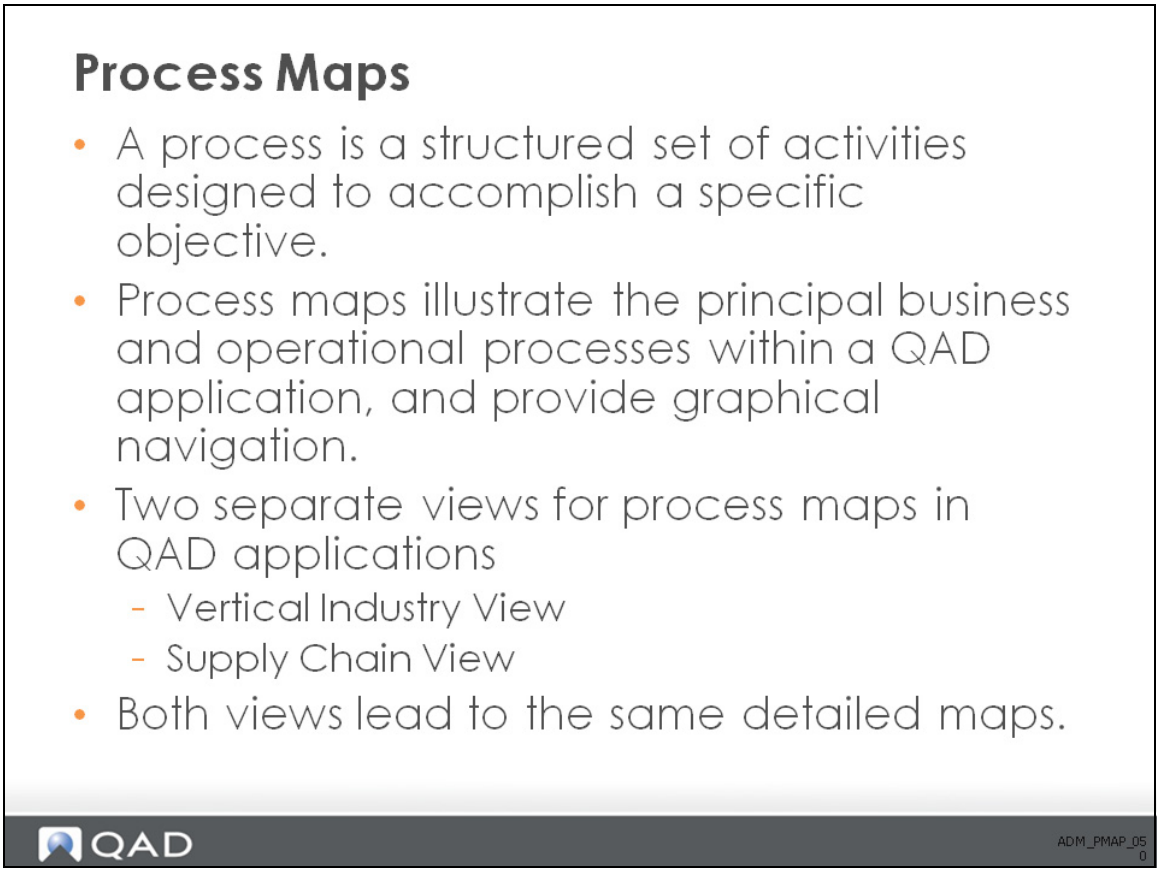
Benefits


Benefits
You will be able to create process maps, and to link process maps to menus and operational metrics.
QAD
ADM_PMAP_030

Training Flow



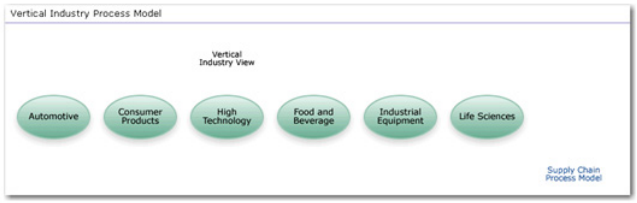
Overview


Process Maps
A process is a structured set of activities designed to accomplish a specific objective.
Process maps illustrate the principal business and operational processes within a QAD application, and provide graphical navigation.
Two separate views for process maps in QAD applications
Vertical Industry View
Supply Chain View
Both views lead to the same detailed maps.
QAD
ADM_PMAP_05
0

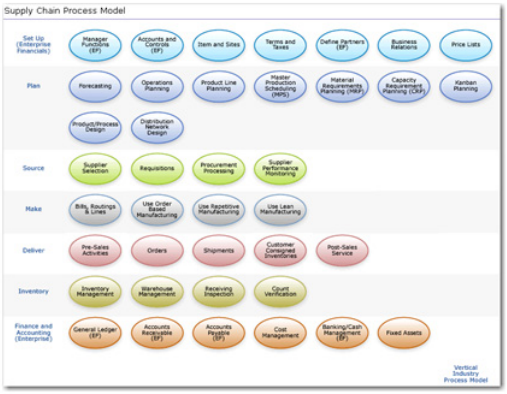
Process Maps View

Process Maps Views

- Vertical Industry



- Supply Chain



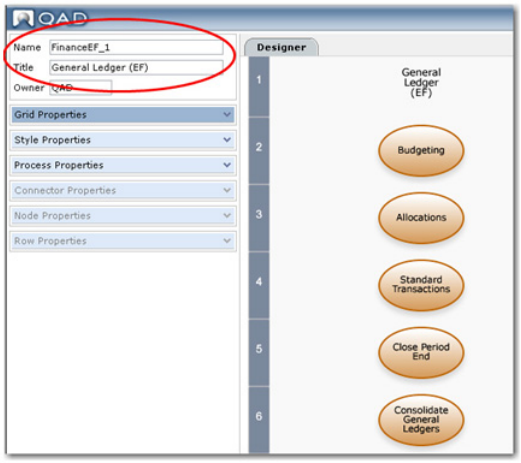
QAD

ADM_PMAP_06_0

Naming Conventions

Naming Conventions

- Each map has:
  - an alphanumeric name, which is also the process map filename
  - a title, displayed on the process map breadcrumb.
- You must enter the title as a Text node for it to appear on the process map.

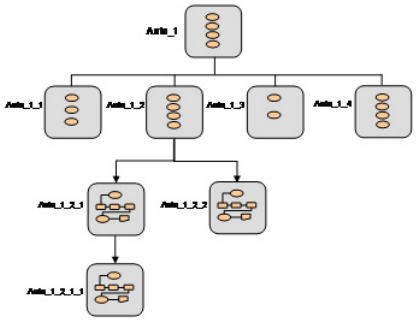


QAD ADM_PMAP_07 0

Numbering Conventions

Numbering Conventions

- A code identifies the functional area to which the map belongs.
- A number indicates the map's place within the map hierarchy for that area.
  - Example: the first map in the Automotive area is named Auto_1. If Auto_1 opens four sub-maps, they are named Auto_1_1, Auto_1_2, Auto_1_3, and Auto_1_4. If two maps open from Auto_1_2, they are named Auto_1_2_1 and Auto_1_2_2.



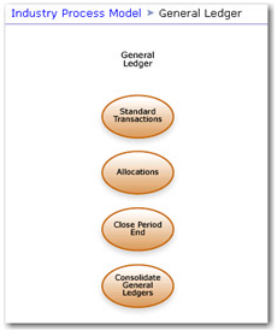
QAD

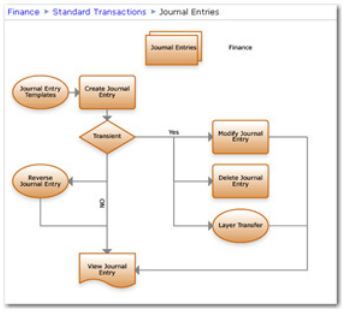
ADM_PMAP_08 0

Map Titles

Map Titles

- Level 1: high-level vertical map for that area; title in black text above the map
- Level 2: a subsequent vertical map, or a detailed process flow; for detailed processes, the title is represented in a collection node





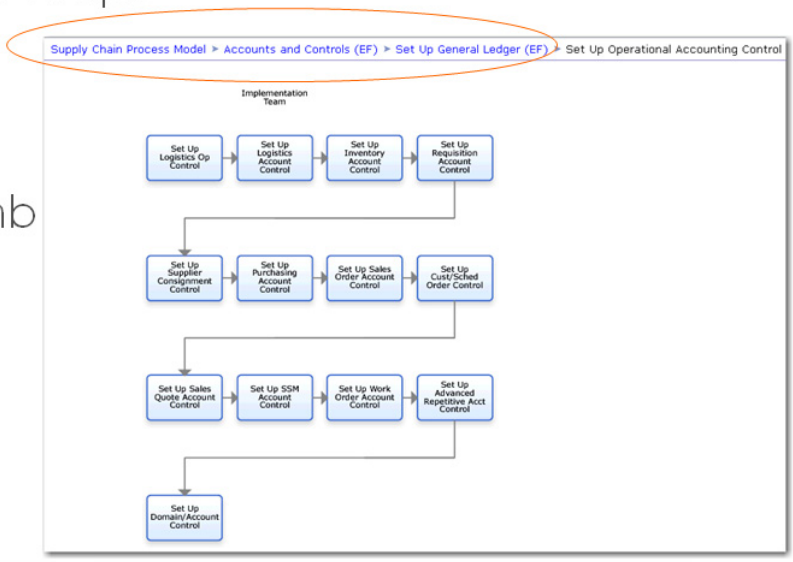
QAD

ADM_PMAP_09 0

Breadcrumbs

Breadcrumbs

- Lowest level maps do not open any subsequent maps
- Title is indicated by a breadcrumb trail



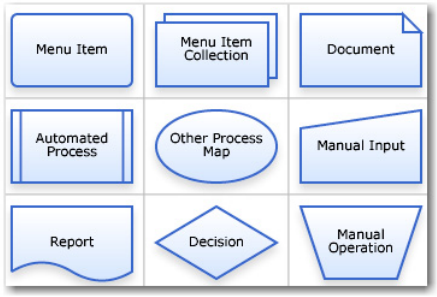
QAD

ADM_PMAP_10 0

Nodes

Nodes

- Menu Item
  - Indicates a link to a program on the menu.
- Other Process Map
  - Connects activities on one process map to another process map.
- Menu Item Collection
  - Links to collections.
- Manual Step
  - Tasks performed outside of the QAD application, for example, external planning
- Decision
  - Directs the flow of a map when it can branch in two directions.

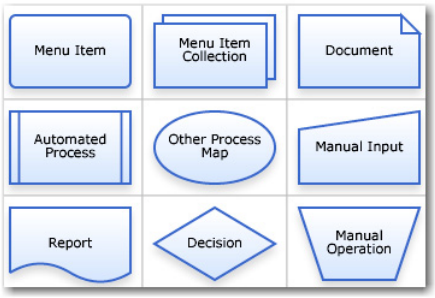


QAD ADM_PMAP_11 0

Nodes

Nodes

- Document
  - Represents reports or files, such as Word documents or Excel spreadsheets, that are relevant to a task.
- Manual Input
  - Indicates inputs to the process from external systems or outputs from the process to external systems, for example, Electronic Document Interchange (EDI).
- Automated Process
  - Indicates a link to an automated process, such as ??
- Report
  - Indicates a link to a report program
- Nodes also indicate a user's permissions with regard to functionality. If the user does not have access to a linked program, the node grays out.



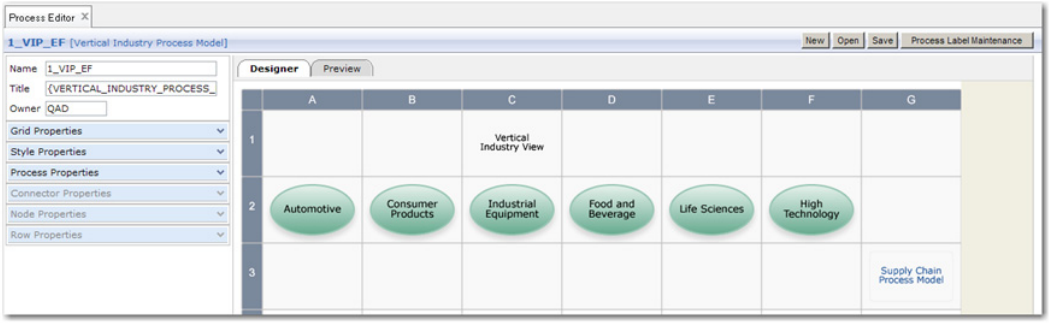
QAD

ADM_PMAP_12 0

Viewing Process Maps

Viewing Process Maps

- Use the Process Editor to view maps

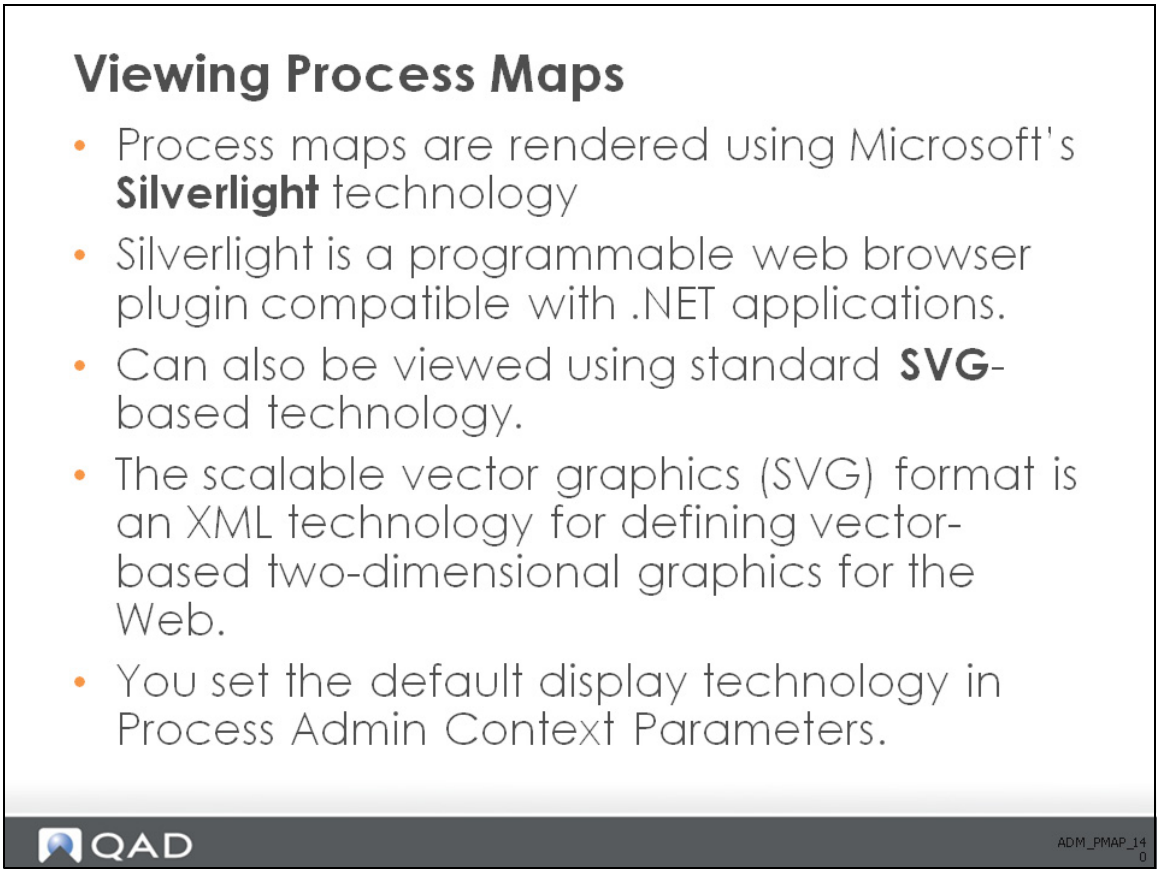


- Click Open to select existing process maps

QAD

ADM_PMAP_13.0

Process Map Rendering

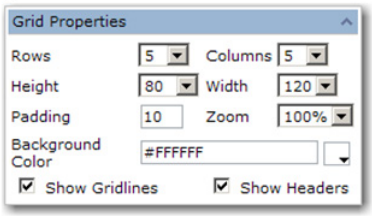


Note Adobe Scalable Vector Graphics (SVG) Viewer is no supported by Adobe Systems. If the SVG plugin does not correctly install automatically, you must install it manually.

Creating a Process Map

Creating a Process Map

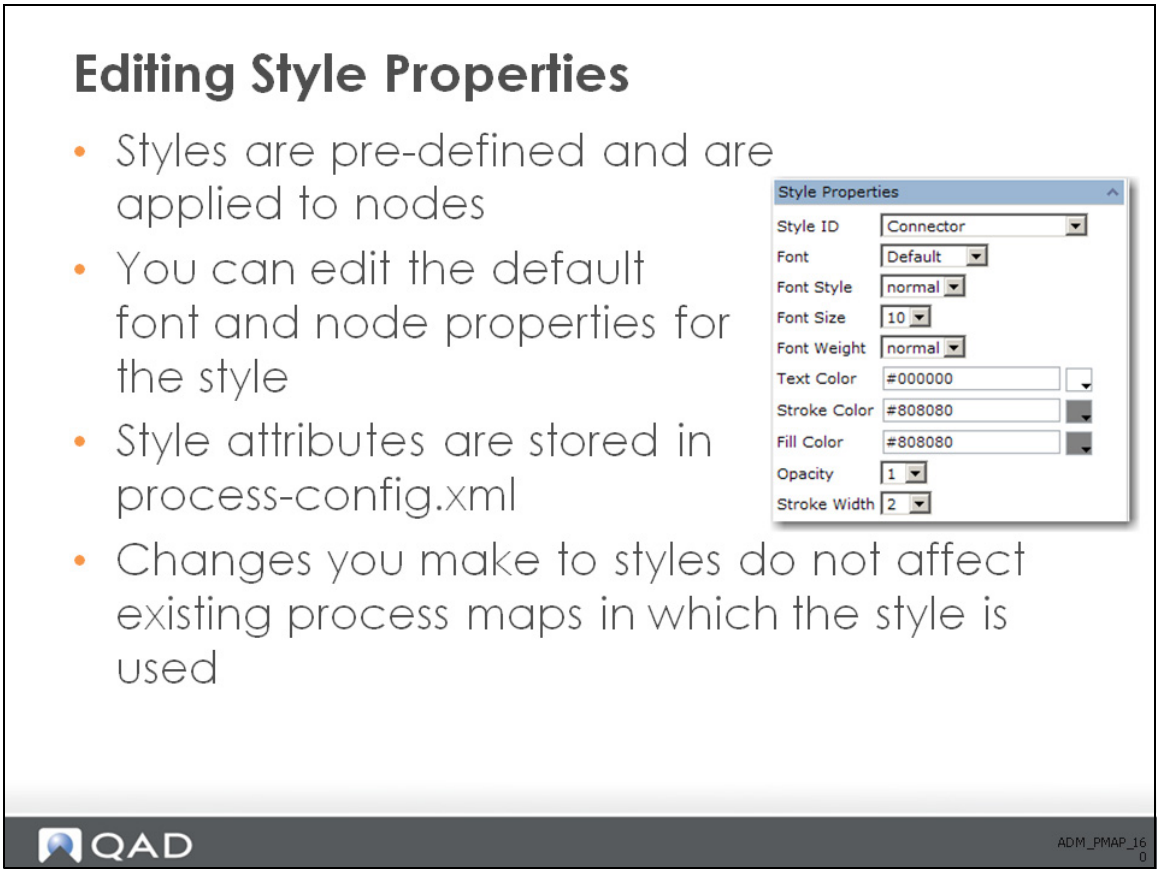
- Click New to create a new map.
- Assign a name, title, and owner. Do not use spaces.
- Use Grid Properties to set:
  - the number of rows and columns,
  - cell height, width, and padding
  - A zoom factor for previewing purposes
  - Cell background color
  - Cell gridlines and header settings



QAD

ADM_PMAP_15.0

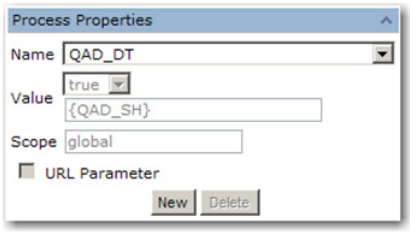
Style Properties



Process Map Variables

Process Maps Variables

- Used to create links from the Editor to programs, images, icons, other nodes, operational metrics, ..
- Variables ensure that processes can be used in multiple environments.
- System global variables are displayed in the Process Properties dialog, and defined in the Process Administration dialog.



- You can also define local variables with this dialog.

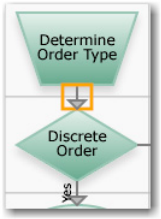
QAD

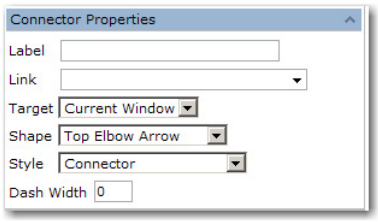
ADM_PMAP_17
0

Connector Properties

Connector Properties

- Available when you select an inter-node connector
- Define properties arrows and lines
- Apply a label, or link the connector to a program, other process map, or file
- If the connector is linked, specify the target window
- Set the shape, style, and dash width





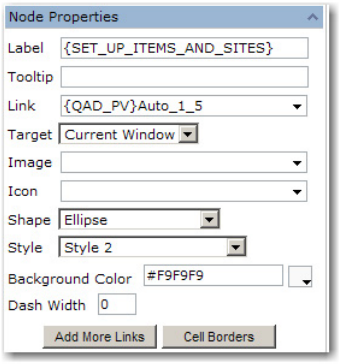
QAD

ADM_PMAP_18
0

Node Properties

Node Properties

- Available when you click a cell in the grid.
- Use to design nodes.
- Set a label and tooltip, which use the default attributes defined in the style.



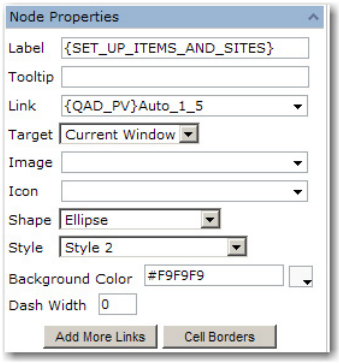
- Link to a file, program or another node. The system uses the process variables to locate the files, programs or process maps to be linked. The Target option lets you open the link in the current window or new window.

QAD

ADM_PMAP_19
0

Node Properties

- Display an image instead of the default node shape.
- The image sized to fit the cell.
- Select an icon to display in the lower right-hand corner of the node.



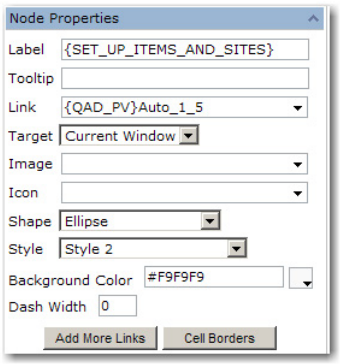
- Select the node shape, based on the function of the node in the process map.
- Select a style for the node, from the default styles defined in Style Properties.
- Set a background color.

QAD

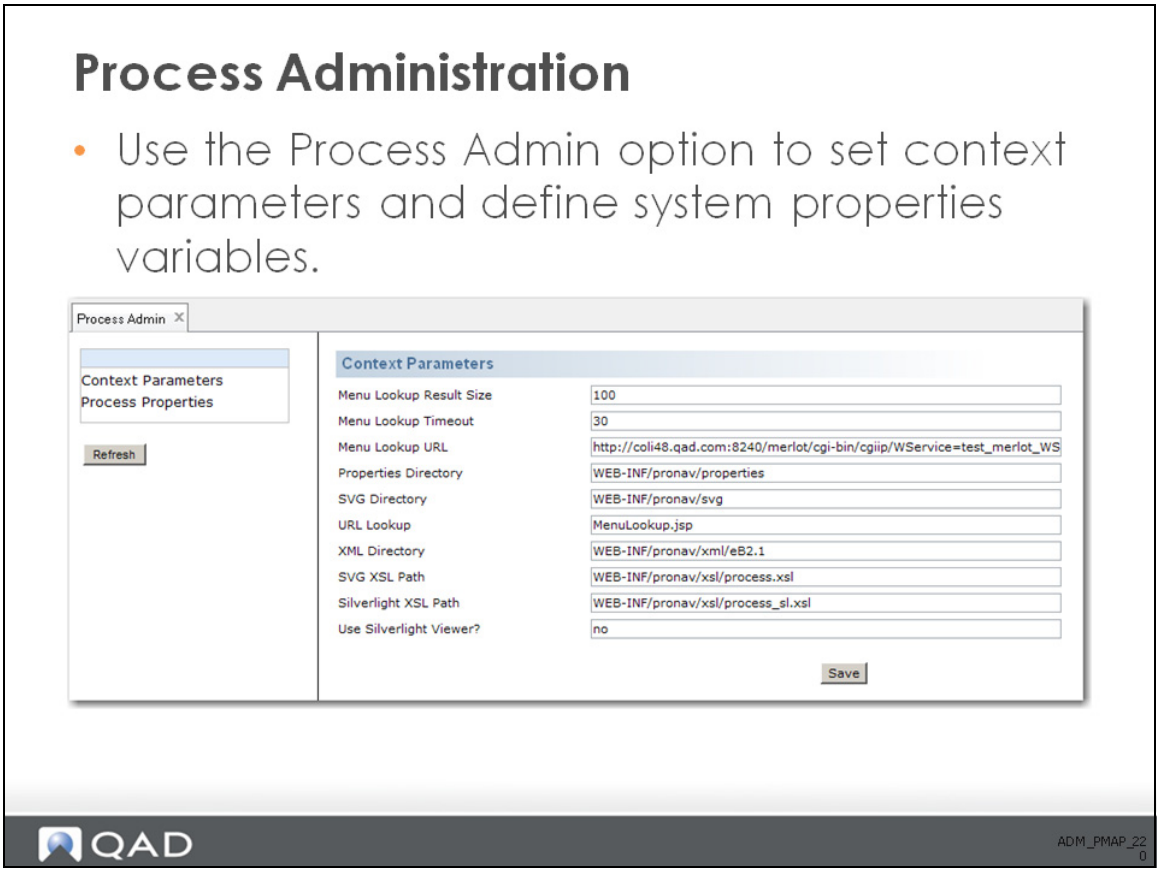
ADM_PMAP_20
0

Node Properties

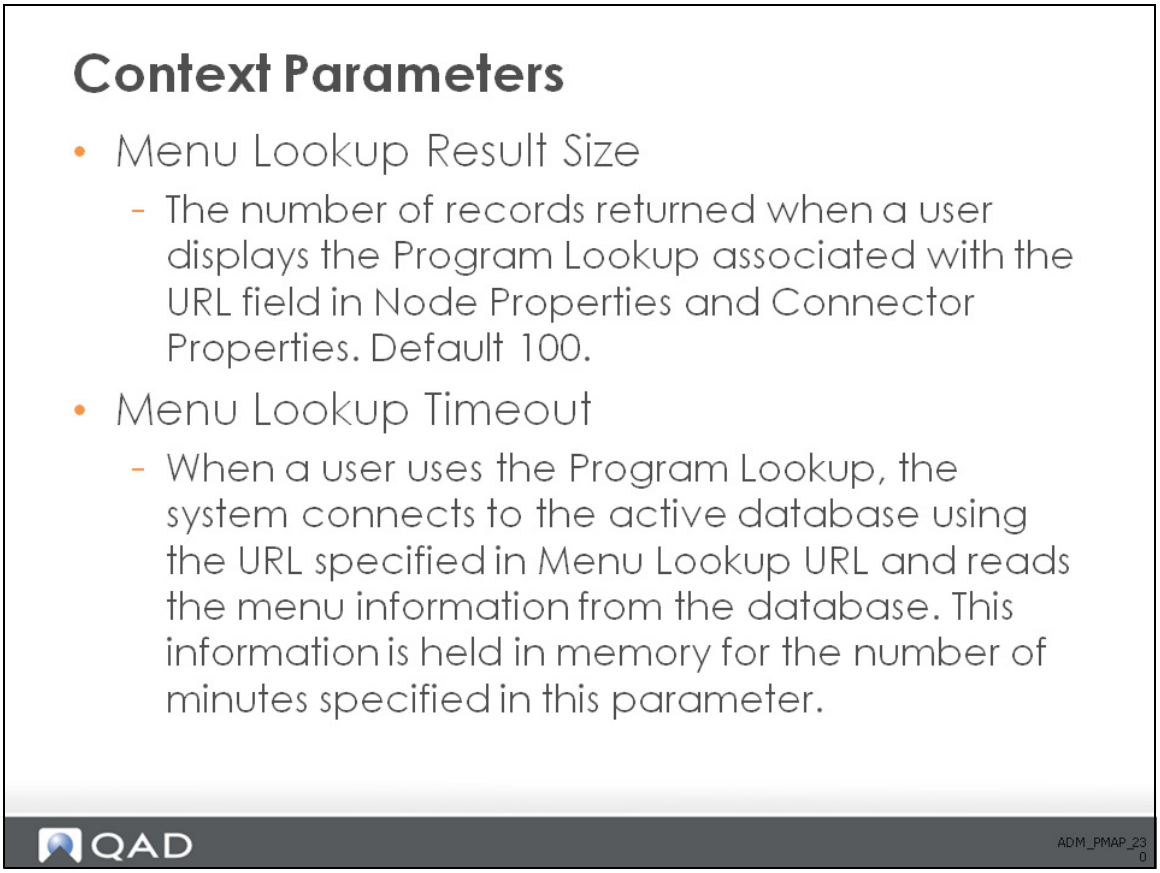
- Dash Width is the length in pixels of dashed lines for the node border or for connectors.
- Click Add More Links to add up to 8 additional URL links for the process map.
- Click Cell Borders to define the color, width, and dash width of the cell borders.

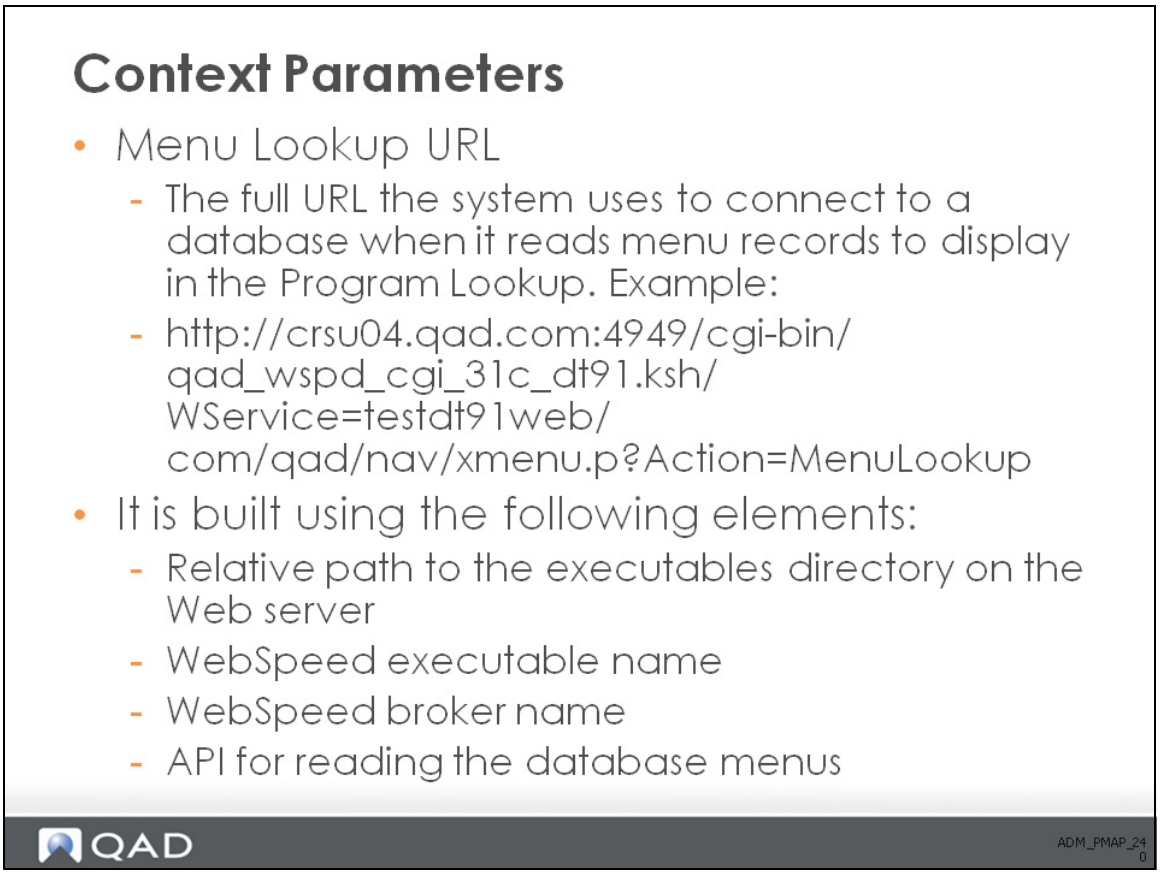


Process Map Administration



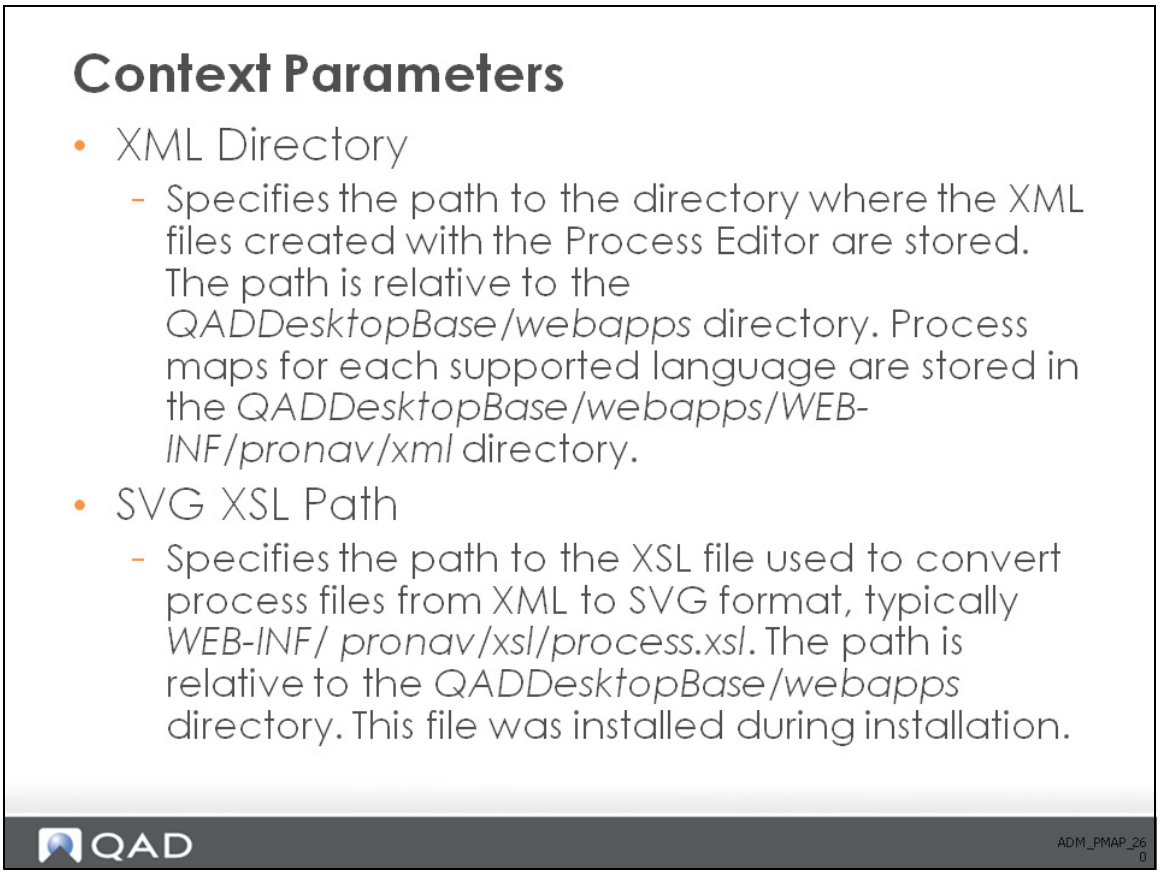
Context Parameters




Context Parameters
• Menu Lookup URL
- The full URL the system uses to connect to a database when it reads menu records to display in the Program Lookup. Example:
- http://crsu04.qad.com:4949/cgi-bin/qad_wspd_cgi_31c_dt91.ksh/WService=testdt91web/com/qad/nav/xmenu.p?Action=MenuLookup
• It is built using the following elements:
- Relative path to the executables directory on the Web server
- WebSpeed executable name
- WebSpeed broker name
- API for reading the database menus
QAD
ADM_PMAP_24 0

Context Parameters

- SVG Directory
  - Specifies the directory path where the SVG files created with the Process Editor are stored. The path is relative to the QADDesktopBase/webapps directory.
- URL Lookup
  - Specifies the file to use for generating the listing of programs associated with the URL field in Connector and Node Properties. By default, this is MenuLookup.jsp.


Context Parameters
• XML Directory
– Specifies the path to the directory where the XML files created with the Process Editor are stored. The path is relative to the QADDesktopBase/webapps directory. Process maps for each supported language are stored in the QADDesktopBase/webapps/WEB-INF/pronav/xml directory.
• SVG XSL Path
– Specifies the path to the XSL file used to convert process files from XML to SVG format, typically WEB-INF/ pronav/xsl/process.xsl. The path is relative to the QADDesktopBase/webapps directory. This file was installed during installation.
QAD
ADM_PMAP_26
0

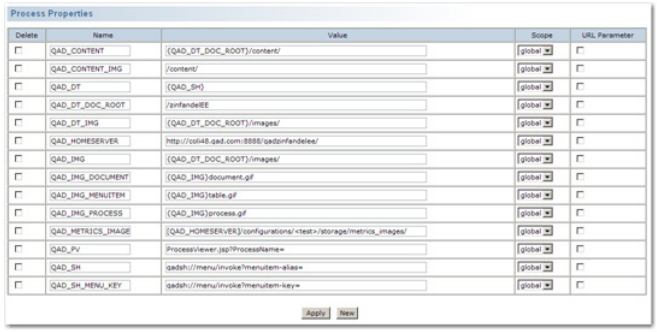
Context Parameters

- Silverlight XSL Path
  - Specifies the path to the XSL file used to convert process files from XML to SVG format, typically *WEB-INF/ pronav/xsl/process_sl.xsl*. The path is relative to the *QADDesktopBase/webapps* directory. This file was installed during installation.
- Use Silverlight Viewer
  - Use this option to set the default process map viewer. By default, this is set to Yes.

Process Properties

Process Properties

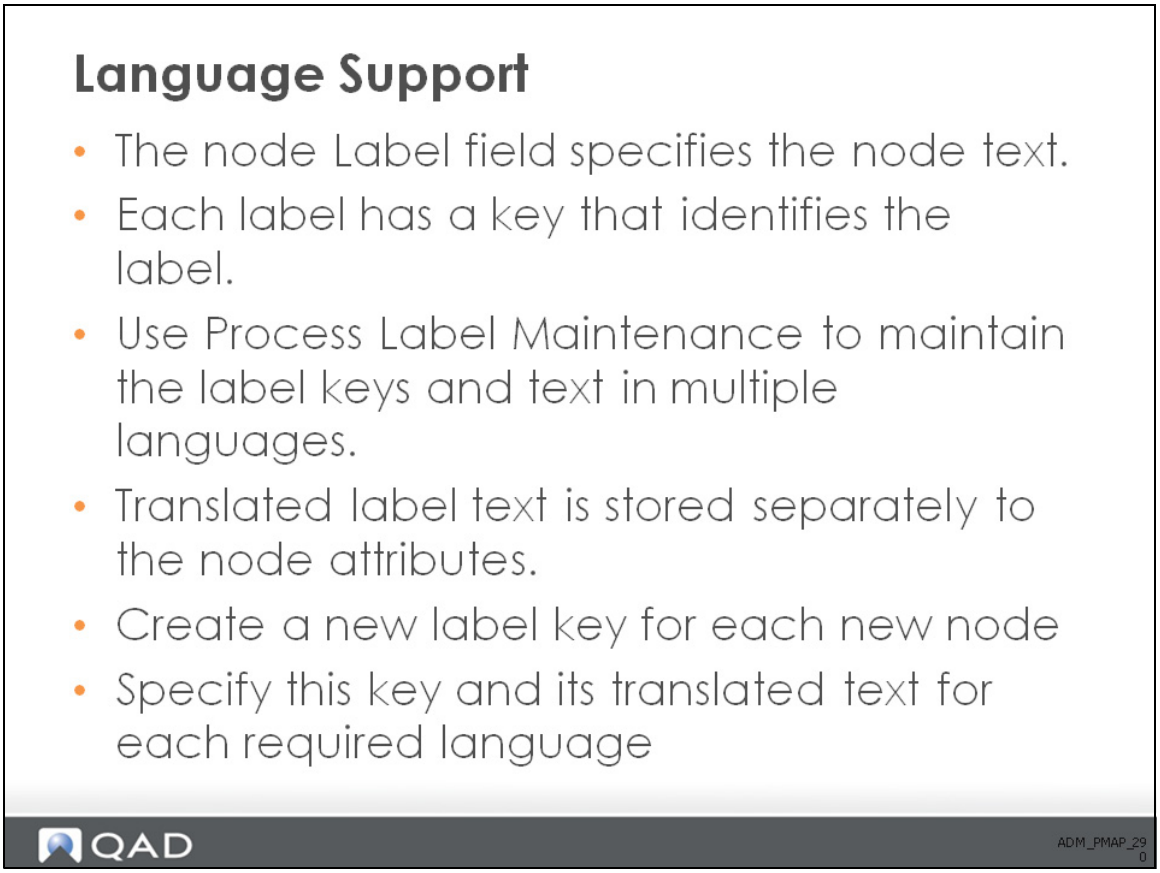
- Use to display variables used by the Process Editor when creating maps
- Edit the default global variable definitions or create a new local variable.
- Generally, you may only need to change the path for the QAD_DT_DOC_ROOT variable.



QAD

ADM_PMAP_28 0

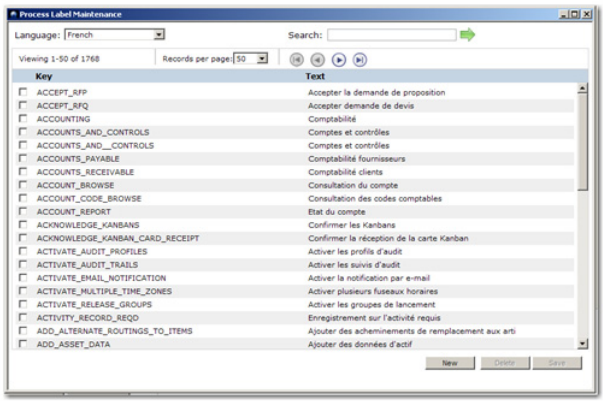
Language Support



Process Label Maintenance

Process Label Maintenance

- Select a language from the drop-down list.
- The translated text is displayed for each label key.

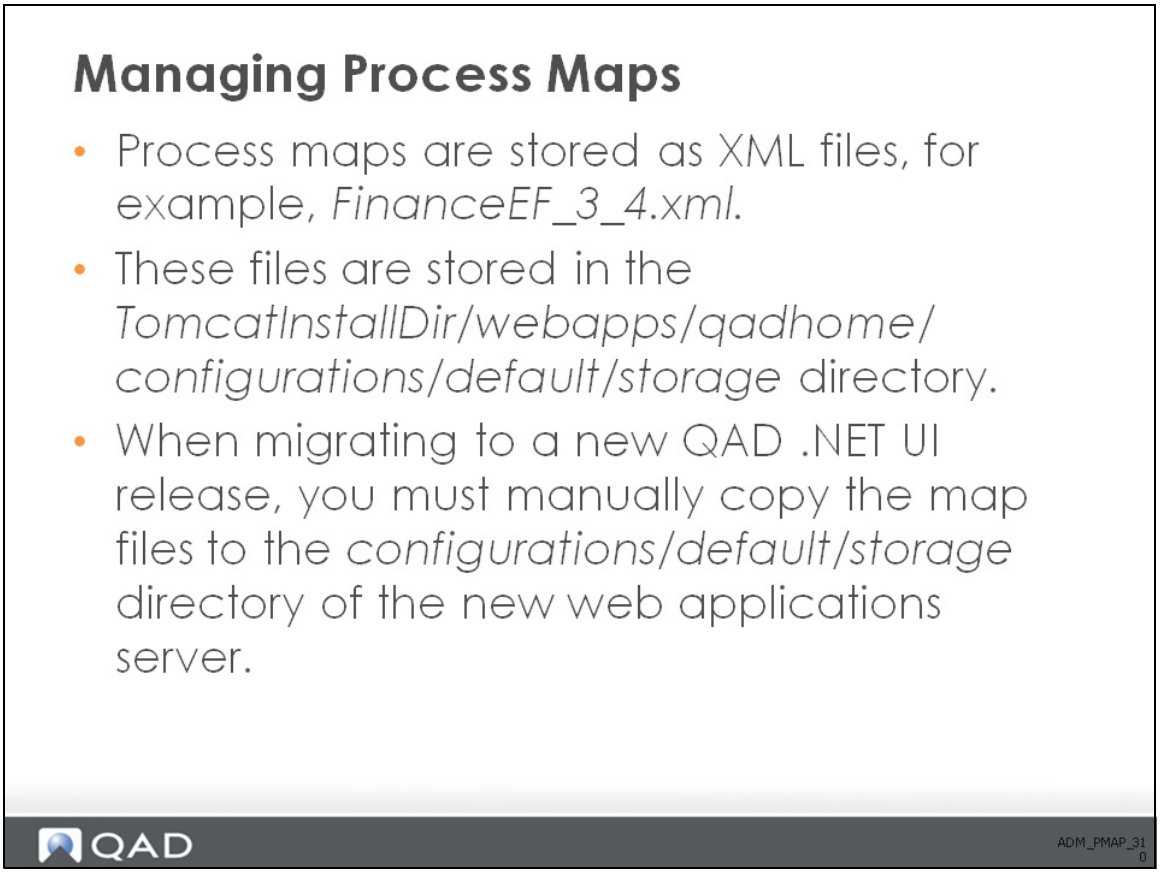


- Translated labels are stored in the *properties_language.xml* file
- The system identifies the label text to display based on the label key and the user's language.

QAD

ADM_PMAP_30
0

Managing Process Maps



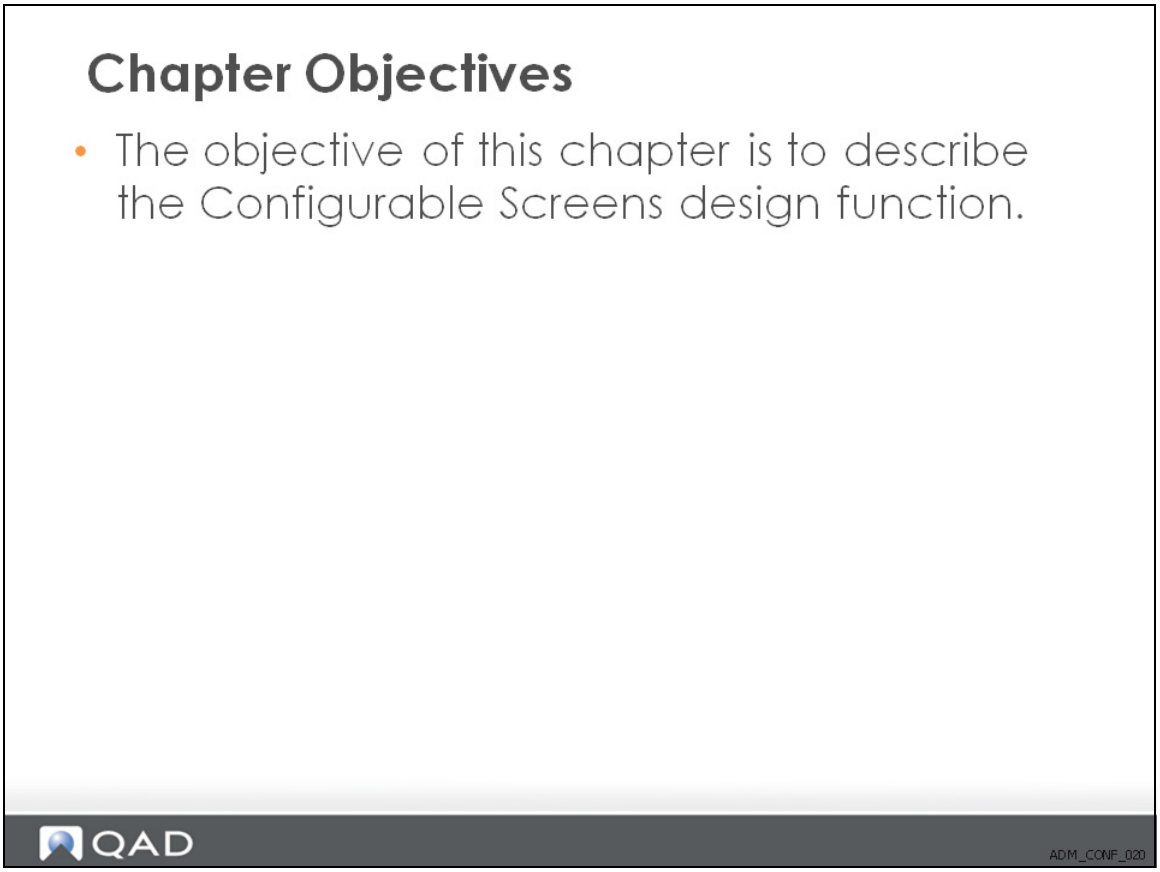
Exercises and Knowledge Check

1. When a user does not have permissions for a program, how is this represented in the related process map?
2. In which menu do you set the default display technology?
3. In which file are the map style properties stored?
4. What is the purpose of the xml directory parameter?
5. Where are process maps stored?
6. What is the procedure for migrating process maps from one installation to another?

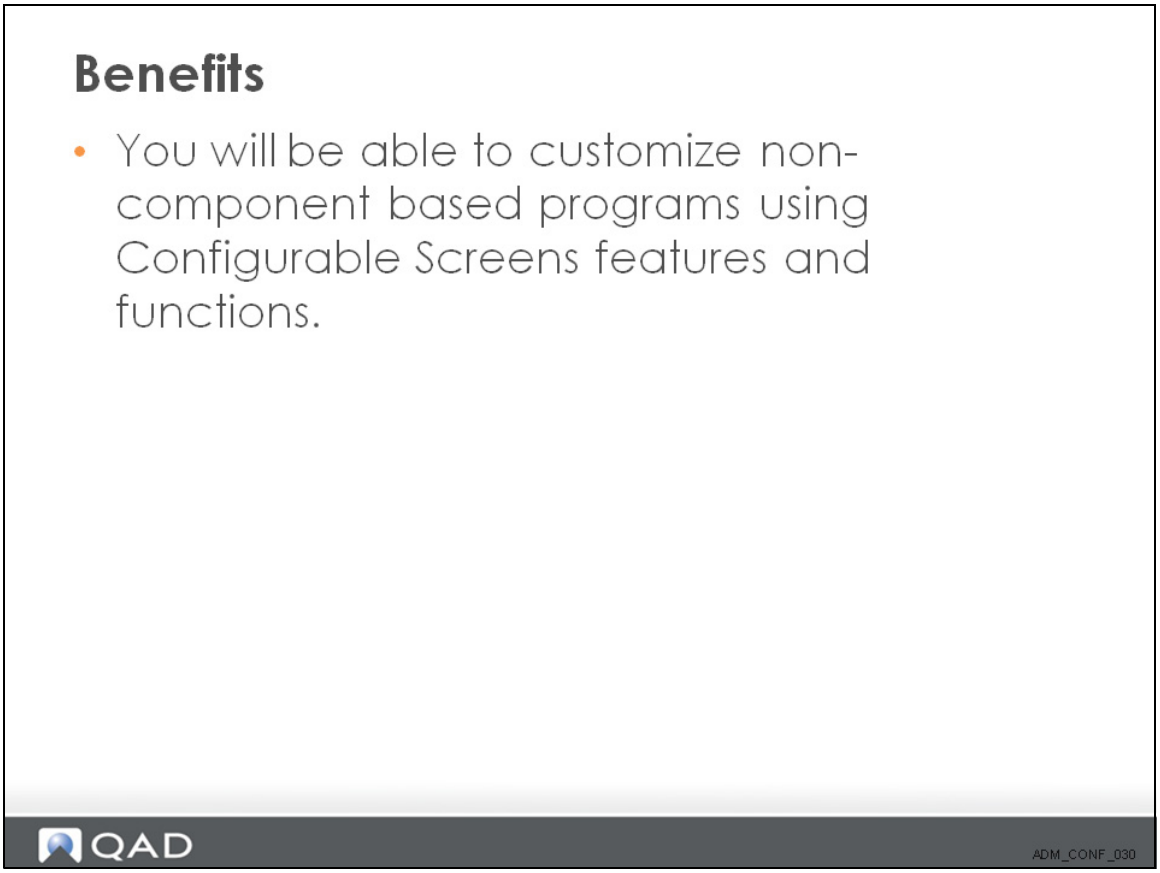
Chapter 9

Configurable Screens

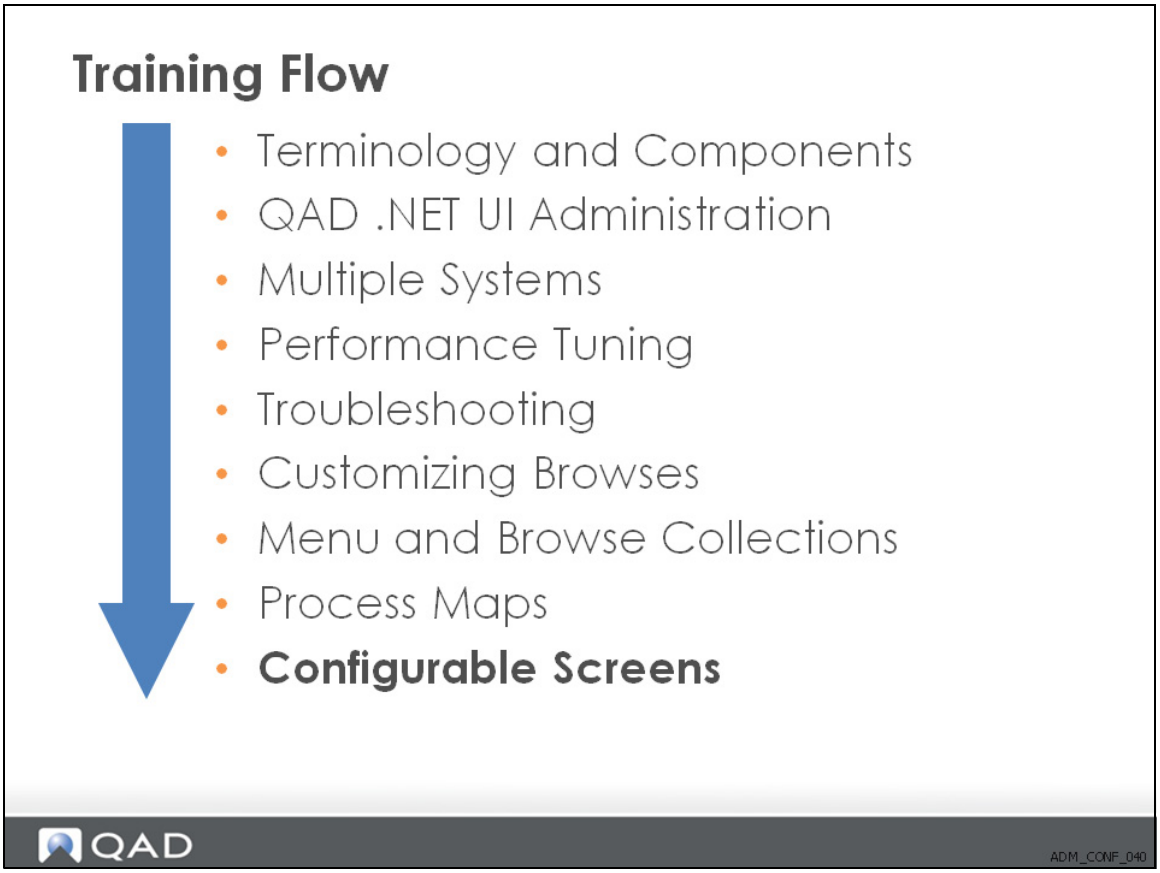
Objectives


Chapter Objectives
The objective of this chapter is to describe the Configurable Screens design function.
QAD
ADM_CONF_020

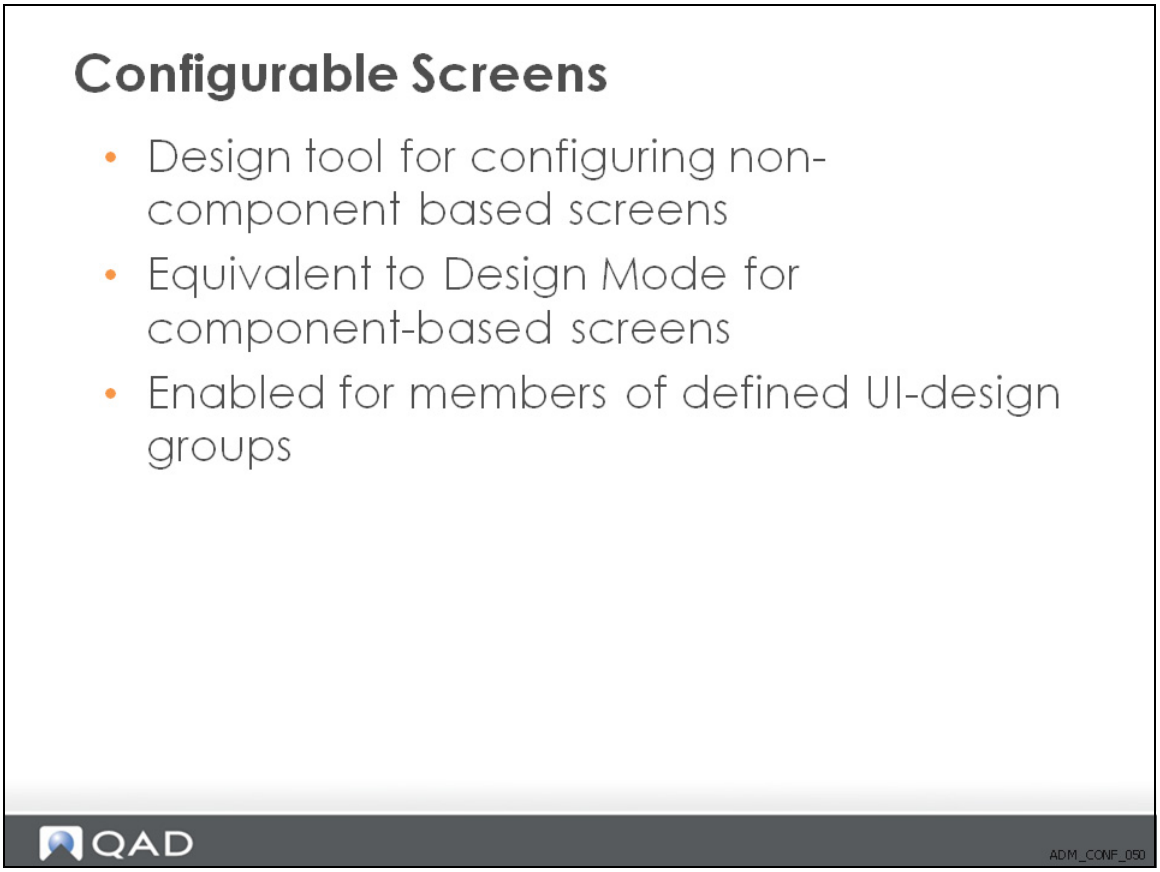
Benefits


Benefits
• You will be able to customize non-component based programs using Configurable Screens features and functions.
QAD
ADM_CONF_030

Training Flow



Overview

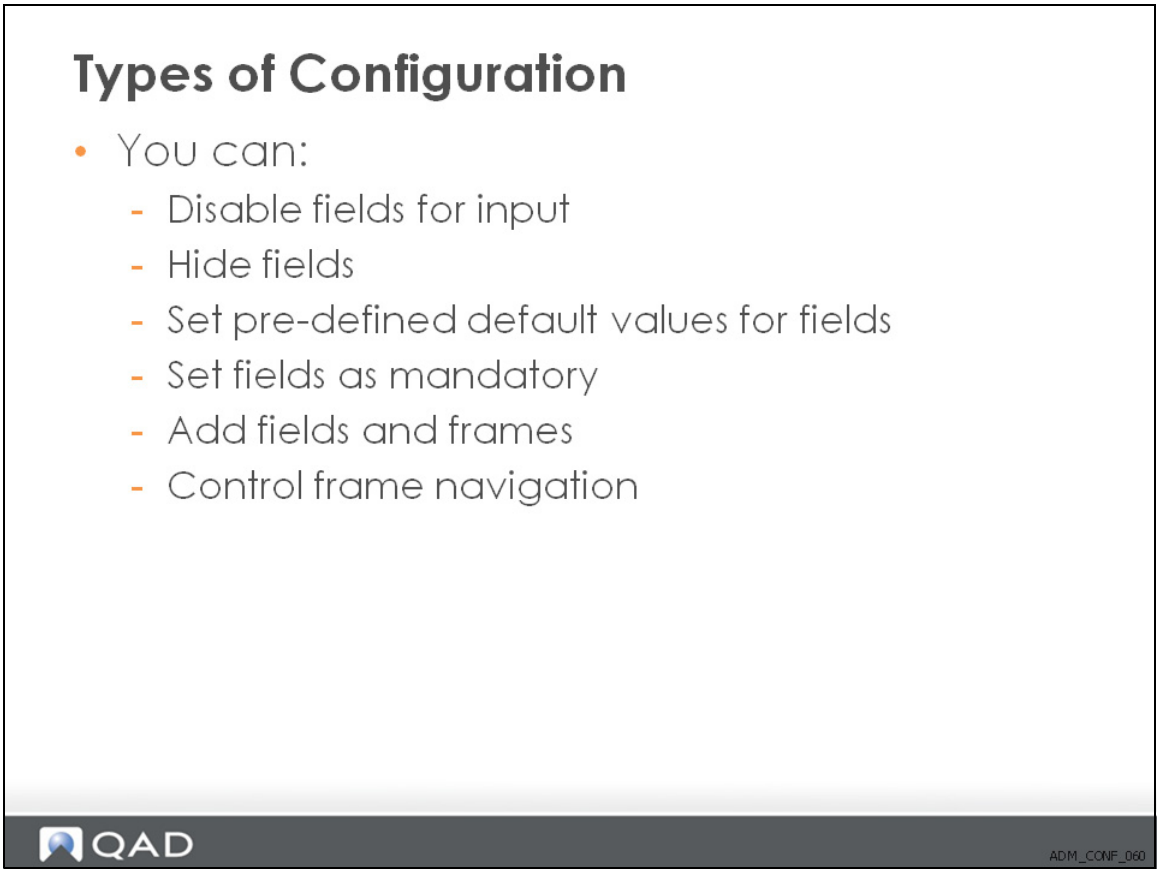


Configurable Screens lets users in a designated UI design group disable fields for input, hide fields, set a predefined default value for a field, mark a field as required, add fields and frames, and set frame navigation.

Configurable Screens is used for non-component based programs only. Component-based screens are customized using Design Mode.

Note Access to the Configurable Screens functionality is enabled by the system administrator.

Types of Configuration



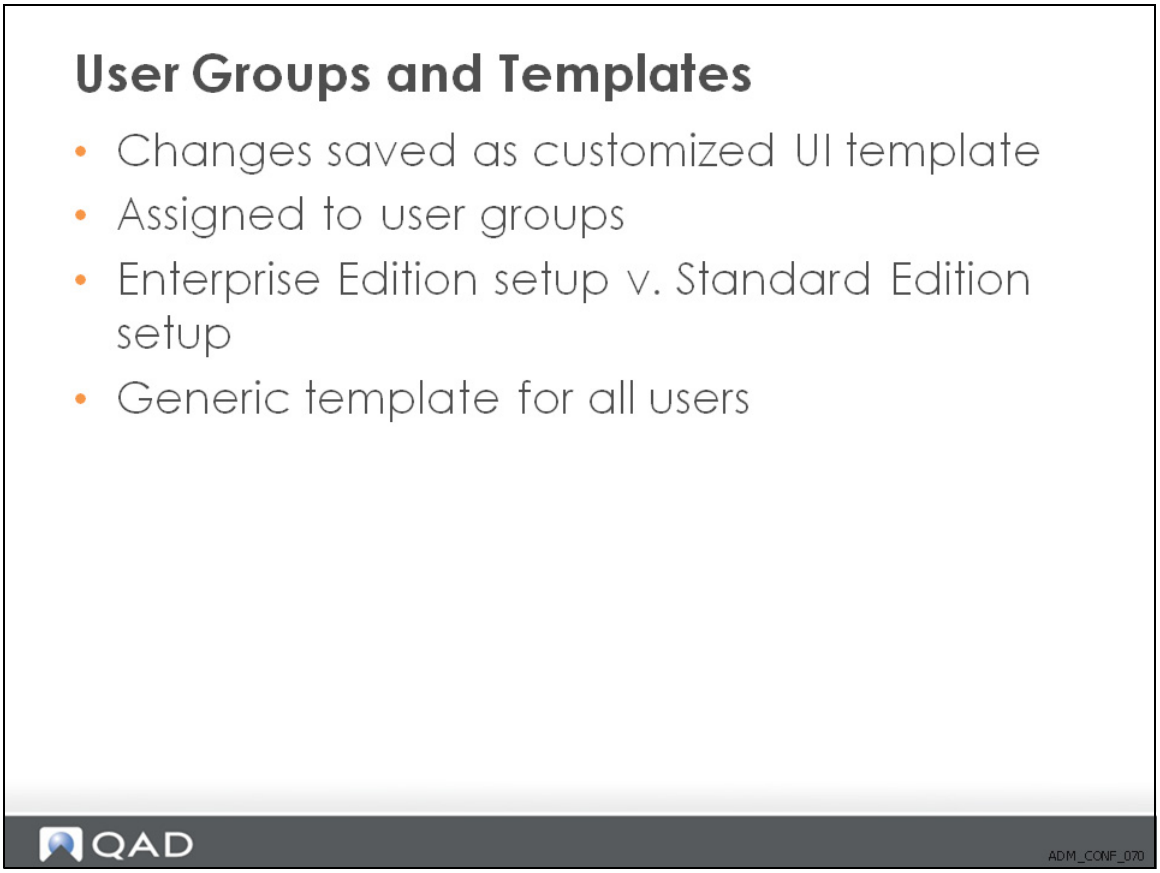
Each company that implements a particular function may use different features. This affects which fields are required and which are optional.

Configuration Examples:

- Generalized codes validation
- Optional modules
- Control settings

You must have a very clear understanding of how a particular function is being used before you change the data input requirements. You must thoroughly test the templates you create before using them in a production environment.

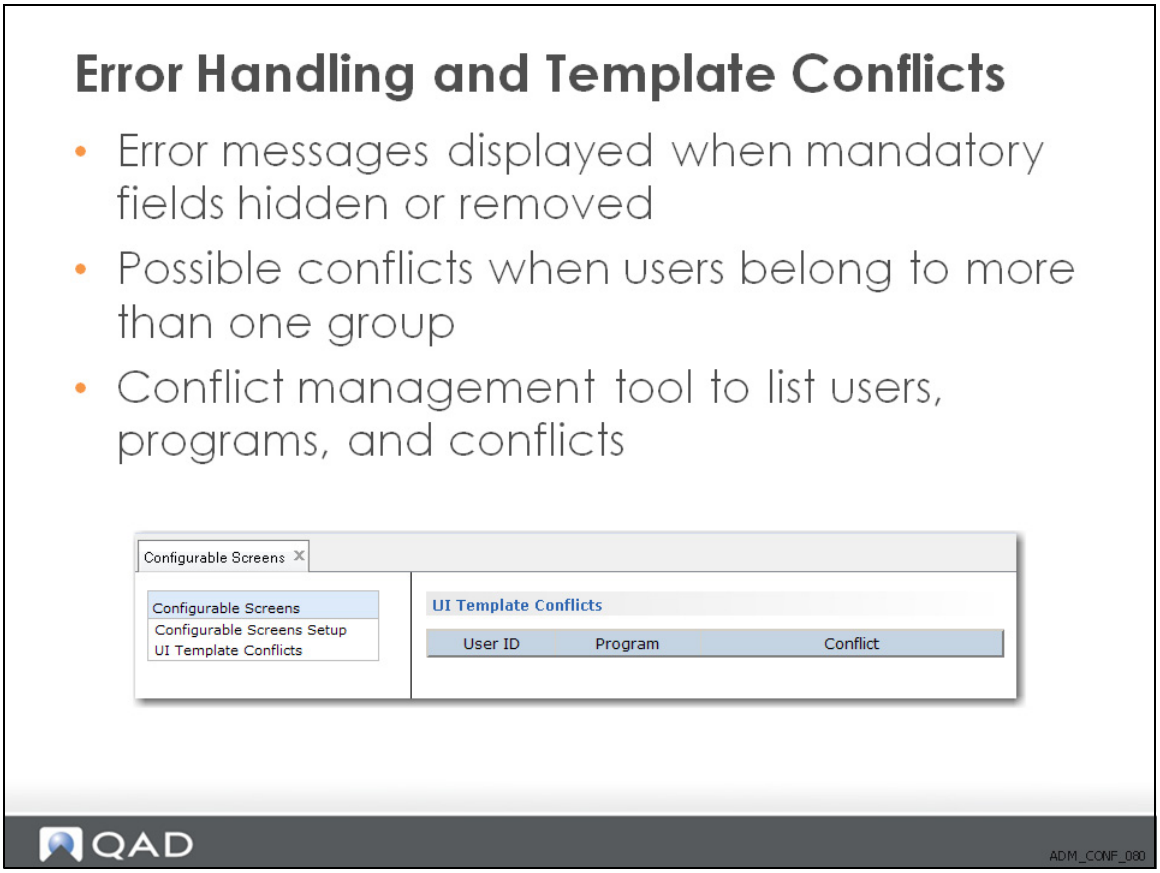
User Groups and Templates



Screen definitions are stored as UI templates, which can be assigned to user groups so that the screen appearance and behavior can vary based on the user's role within an organization.

In QAD Enterprise Applications - Enterprise Edition, the user group function is replaced by the role function. To enable Configurable Screens in Enterprise Edition, you therefore enter the name of the role to which you want to assign the function in the UI Design Group setup field. The users to which this role has been assigned are then authorized to use Configurable Screens.

Error Handling and Template Conflicts

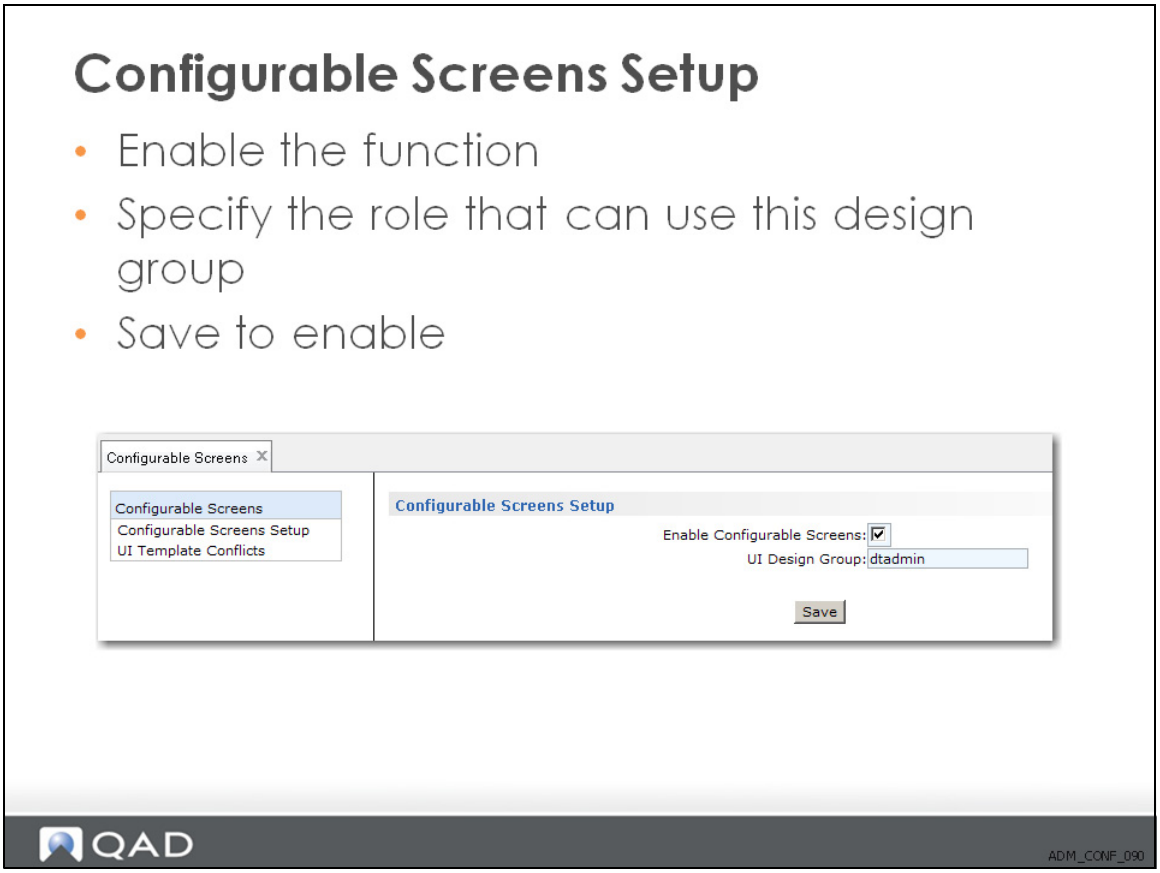


When you hide a field that is validated by the system, and attempt to progress through the frame containing the field, the system displays the following error message:

```
The following error was caused by a configurable screen setting.
Please contact your System Administrator.
ERROR: Country code does not exist. Please re-enter.
```

Use the Configurable Screen UI Template Conflicts screen to resolve conflicting template assignments. If a user belongs to more than one group, the system uses the template associated with the first group assigned to the user. You can view and manage these conflicts using the UI Template Conflicts function, accessible from the Configurable Screens table on the Configurable Screens Admin screen. The administrator can use the drop-down list in the Conflict column to select the group assignment that the system should prioritize.

Setup



To setup configurable screens:

1 Choose Administration, Configurable Screens.

2 Select Configurable Screens Setup.

Enable Configurable Screens

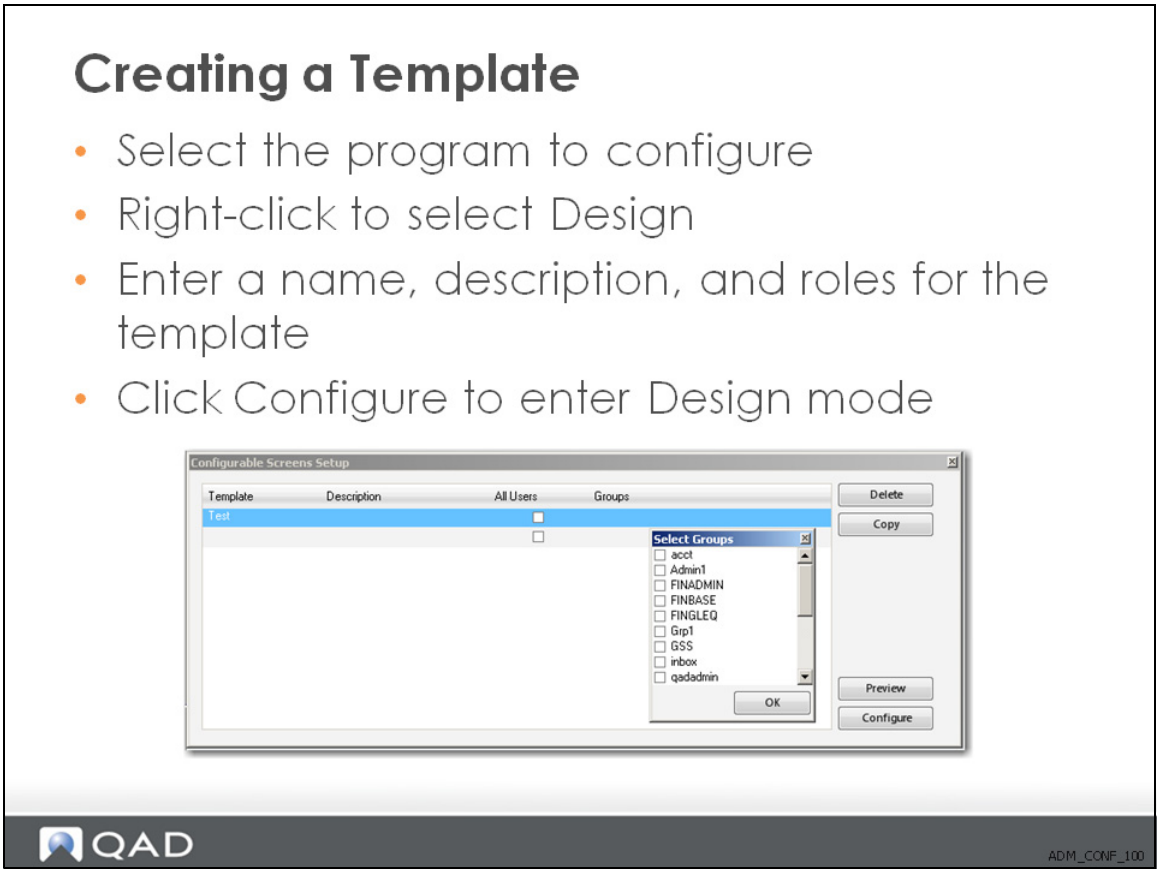
Select this field to enable the function for members of the UI Design Group. If you do not select the field, the function is disabled for all users.

UI Design Group

Enter the name of a role that is authorized to create and modify screen templates. Only users assigned to this group can create configurable screen templates. You can create a specific role for Configurable Screens using Role Create (36.3.6.1).

Click Save to apply this setting.

Creating a Template

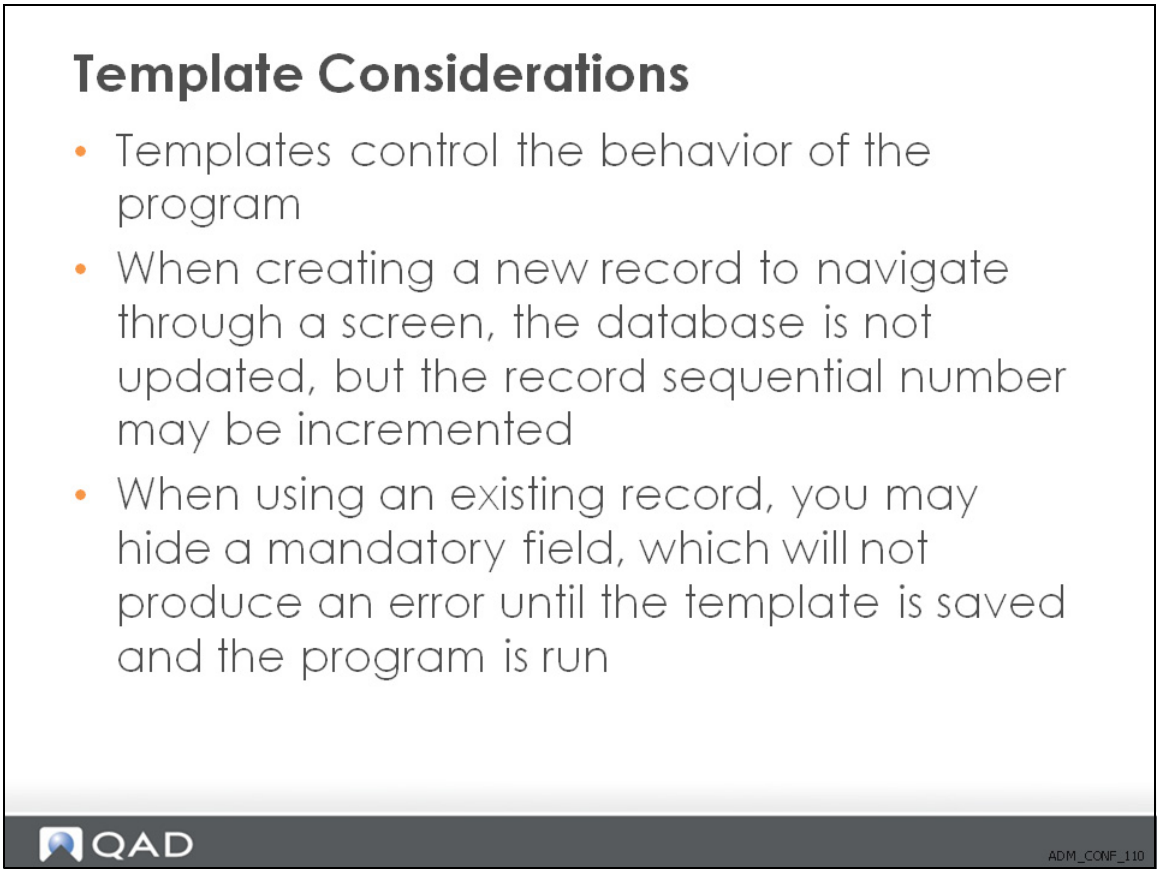


Right-click the program name in the Applications area, and select Design to display the setup screen.

You can assign this template to all users, or select a specific role.

Templates are defined per program. When you select Design for a program, the existing templates for this program are listed, and you can use Delete to remove unwanted templates, or Copy to copy an existing template. When you copy a template, the copy is re-named by adding a 1 to the template name.

Template Considerations

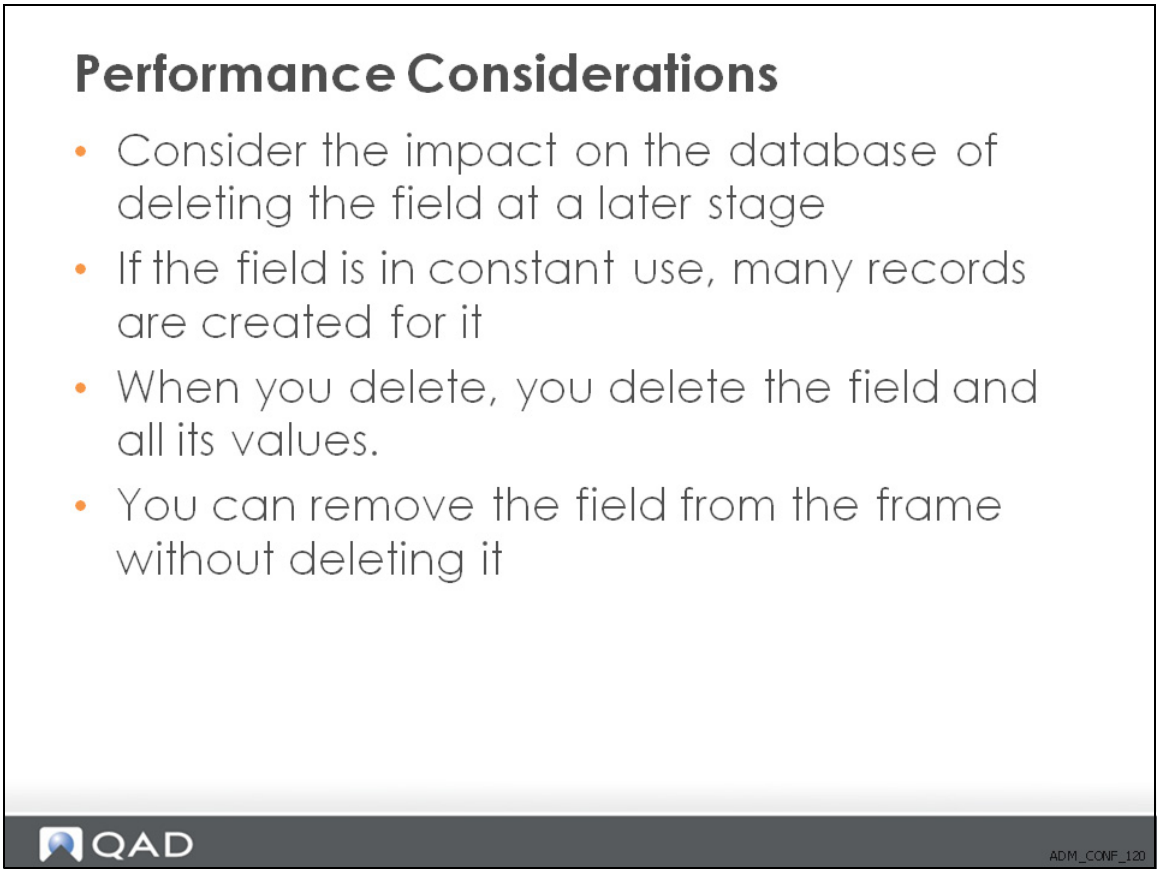


Each template defines how fields display, whether they are required and enabled, if default values are supplied, and any automatic navigation from frame to frame.

To move through the sequence of frames in a program, you must either create a new record or modify an existing one. In cases where new records are assigned sequential numbers, it may be better not to create new records. Although the records are not saved, number sequences are incremented.

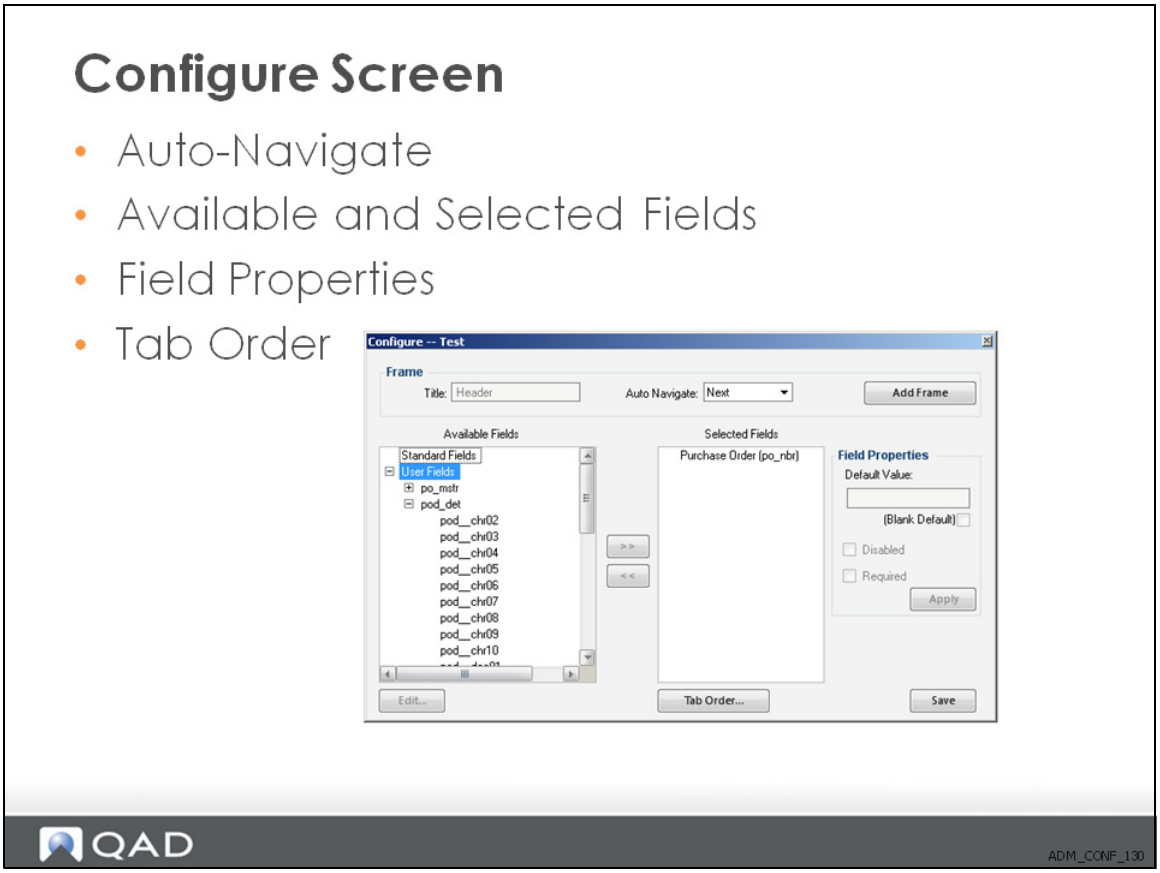
If you hide a required field and test with an existing record that has a field value, no error is generated. Later when a user attempts to create a new record, template errors may occur because a field that needs input cannot be updated.

Performance Considerations



When you create your own field and frame, you add the field to the schema, and as the program is used, users add values to it. When you delete, you delete the field and all its stored values from the database. Use the Disable or remove options to remove a field from the screen without deleting it from the database.

Configure Screen



You can click the Save 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.

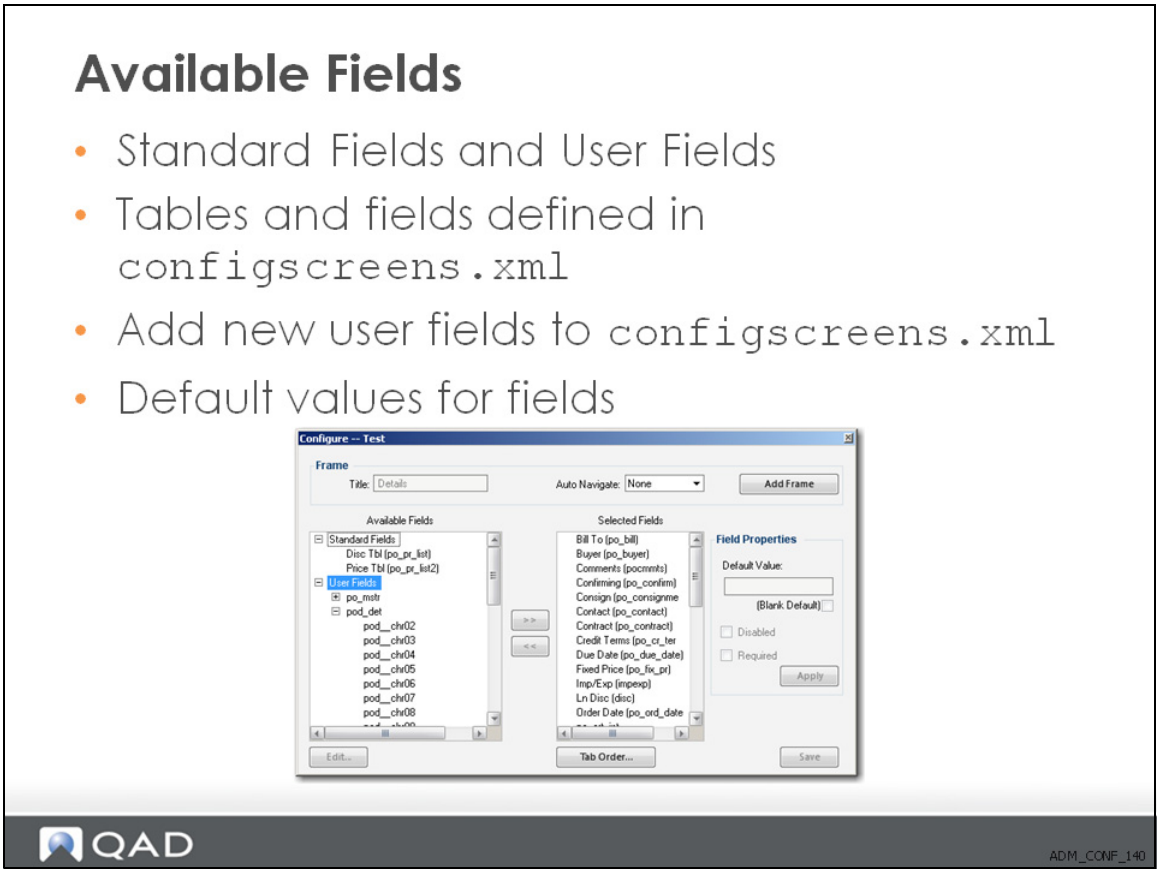
Auto-Navigate. Use Auto-Navigate to control navigation between frames. You can use the Next and Back options to skip entire frames. To skip an entire frame without generating an error, the proper defaults must exist for all required fields. Next and Back have a similar effect; use them to skip the display of a frame. Which one you use depends on the normal screen navigation.

Available Fields. This area displays the user-defined fields you can add to the current frame or to a new frame. These fields are defined for each program in the `configscreens.xml` file.

Selected Fields. This area displays the fields selected for use on the current frame.

Tab Order. The tabbing order is the sequence in which you access fields using the Tab key. Click to display the tabbing order of fields in the current Frame. Use the Up and Down buttons to change the order, if required.

Available Fields



- Standard Fields

  These are existing data fields for the program. The Standard fields area only displays fields that have been hidden from the screen as part of a previous customization.

- User Fields

  These are the default user customization fields that are defined for all tables.

Adding New Fields and Tables to Programs

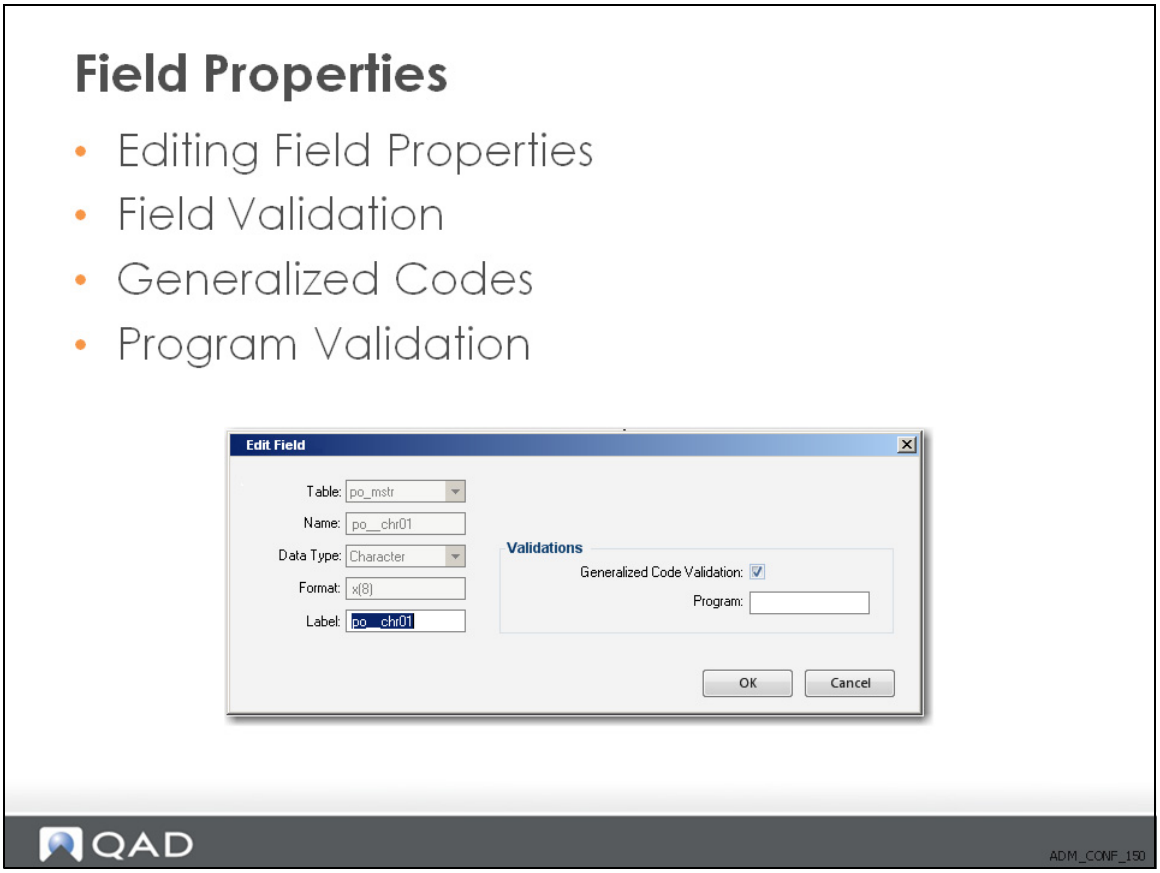
When you design a program, the user fields available to add to the screen are displayed in the Available Fields area. You can add these to existing frames, or create a new frame to contain one or more of these fields.

By default, only specific tables and fields are displayed for a particular program. These tables and fields are defined in the `configscreens.xml` file.

Default Values

You can add a default value to existing or new fields, which is displayed in red on the screen. A drop-down list of default values (None, True, or False) is displayed beside logical-type fields. Defaults you specify for a template override any other defaulting logic associated with a field are only applied to new records; when a record is being edited, no field values are overridden.

Field Properties



The Edit Field screen displays read-only properties for the selected field, and lets you modify the field label and validation.

Note The Edit Field screen is not available for Standard Fields.

Table

This read-only field displays the database table for which this field is defined.

Name

This read-only field displays the field name.

Data Type

This field displays the field type: character, date, logical, decimal, user 1, or user 2

Format

This read-only field displays the field data format, for example, the maximum number of characters for a character field.

Label

This field displays the field label. 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.

Generalized Code Validation

Check this field to ensure that the values for this field are based on the valued specified in Generalized Code 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.

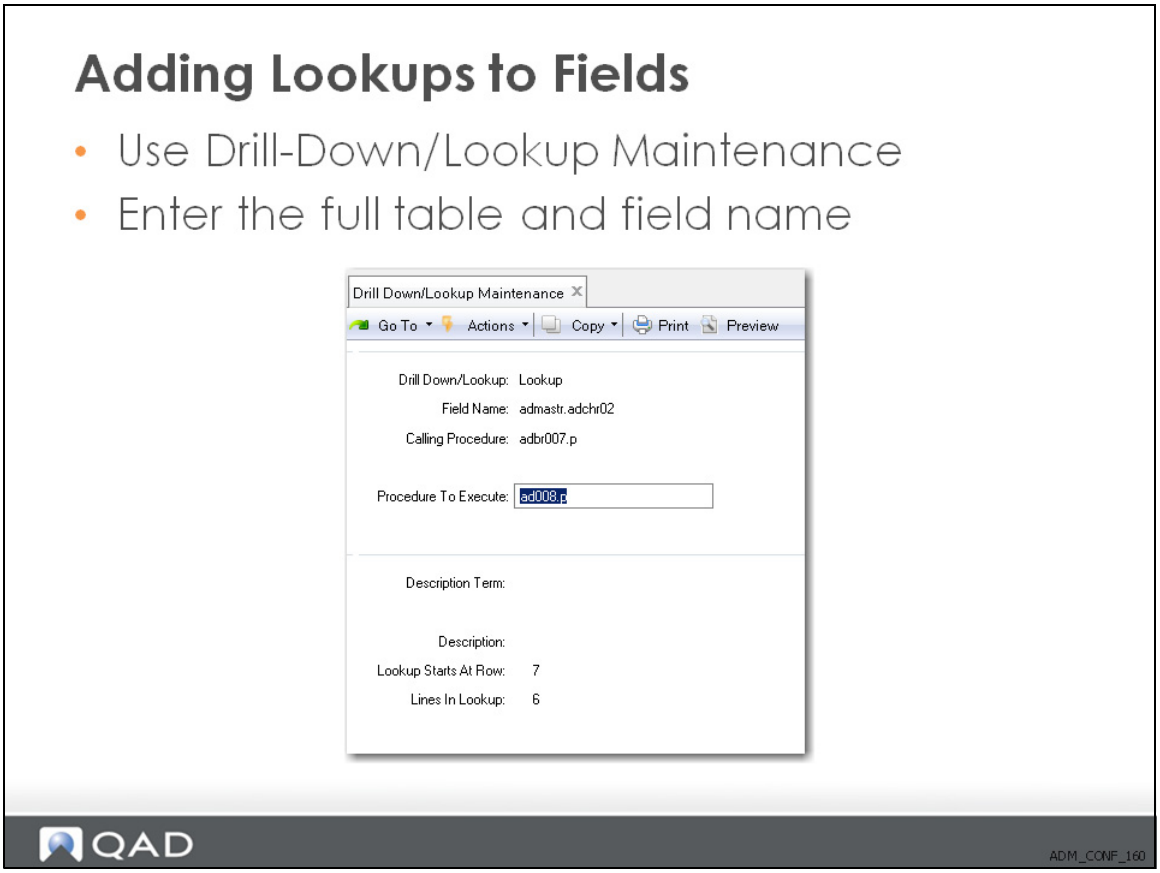
Note When adding values in Generalized Codes Maintenance, you must specify the full table and field name. For example, if specifying values for the field `pt_chr01`, you enter the table and field name `pt_mstr.pt.chr01`.

Program

Use this field to enter the name of a user-defined Progress program that validates the field.

You can use the program template `gpvalidate.p` to create your own Progress programs. This template is stored in the *`QADInstallDir`*`/qadui/com/qad/shell/interface` directory and contains instructions for usage. Copy the template and rename it appropriately.

Adding Lookups to Fields

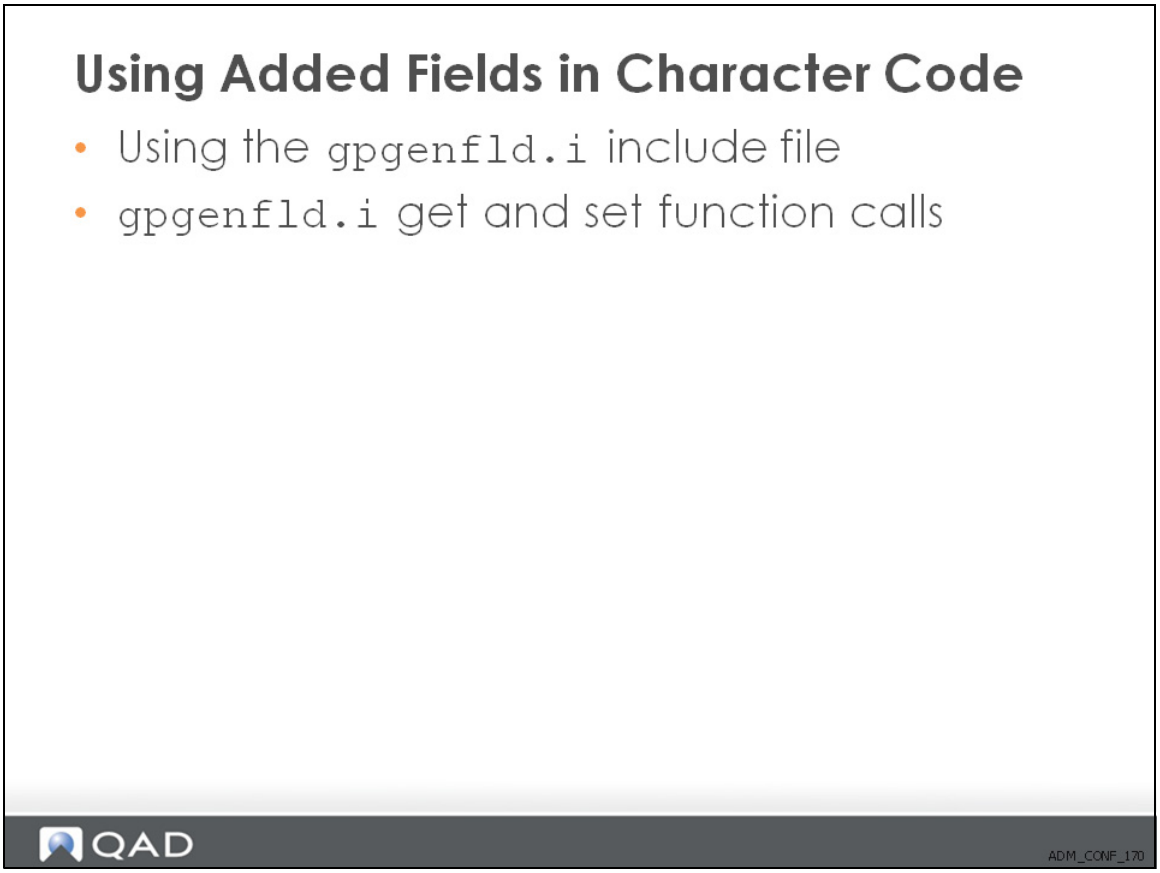


Use Drill-Down/Lookup Maintenance (36.4.8.1) to assign drill-downs or lookups to fields that do not have a browse, to replace a browse, or to delete one.

Warning Most programs attached to a function with Drill-Down/Lookup Maintenance display values in a database table. You can attach any Progress function to a field, and this program executes when the user selects Help. For example, you can attach the program `calculat.p` to field `pt_avg_int` to display a calculator.

When you create your own field and frame, you add the field to the schema, and as the program is used, users add values to it. When you delete, you delete the field and all its stored values from the database. Use the Disable or remove options to remove a field from the screen without deleting it from the database.

Using Added Fields in Character Code



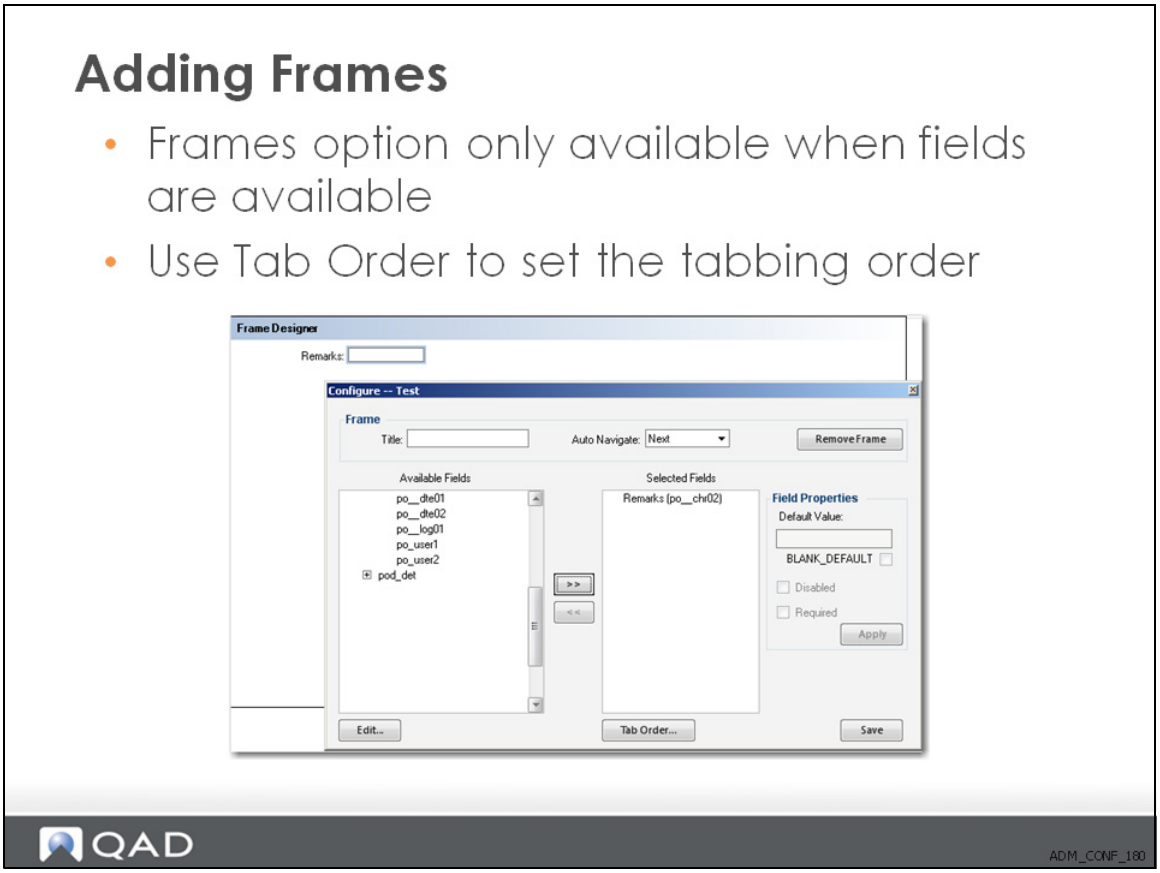
You can modify character code to add new fields to program screens. New fields can be added to existing tables without requiring schema changes. These fields are not physically part of the master tables but are stored in a side table and thus require a different way to access their values from the code. For this purpose, the include file `gpgenfld.i` gives access to the values of these new fields through function calls.

Note This function is only used when modifying character code.

To gain access to the get and set function calls, include this file at the top of the program that will use them, for example:

```
{com/qad/mfgpro/gpgenfld.i}
```

Adding Frames



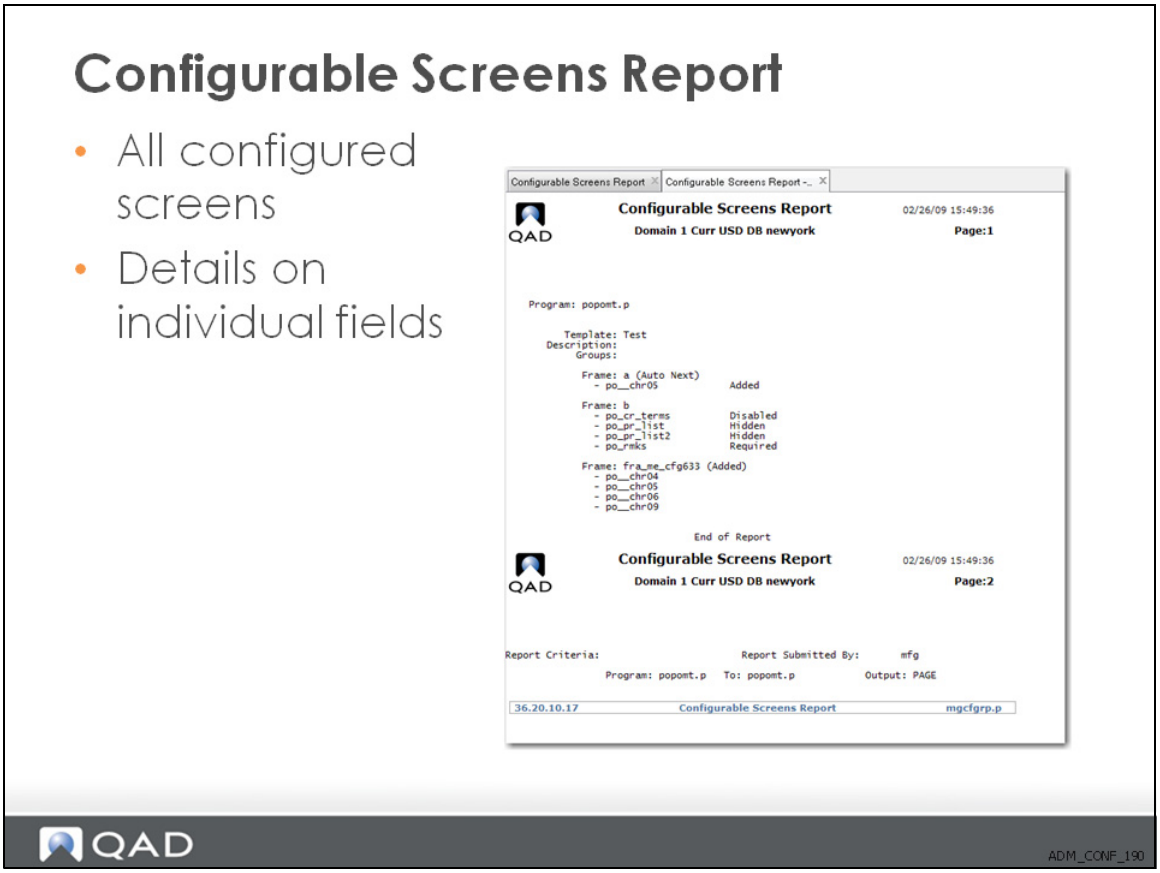
The Frame button is only available when there are available fields to add. A default message (8622, ‘See User Guide for adding User Fields) is displayed when no fields are available.

The new frame is displayed behind the Configure screen. To add fields to the screen, use the arrow key to move fields from the Available Fields area to the Selected Fields area. Use the cursor to position fields in the frame, and click the Tab Order button to set the tabbing order for the frame.

Click Save to save this frame and insert it into the program sequence, or Remove Frame to remove the frame from the sequence. When you remove a frame, the fields are selectable again in the Available Fields area.

When you create a new frame, save your updates and exit Configure Screens, the frame is displayed immediately following the current frame when you next launch the program.

Configurable Screens Report



You can generate a report on individual configured screens or on all screens.

Exercises and Knowledge Check

1 How does Configurable Screens handle template conflicts?

2 You cannot delete design templates: True or False?

3 How do you define the tabbing sequence in a new frame?

4 In which file are new fields defined?

5 How do you add a lookup to a field?

6 What causes the Frame button to be unavailable?