Do You See What I See? What's New in QAD 2021.1

Webinar: December 9, 2021 2:00 PM

WE ARE STRATEGIC

Strategic INFORMATION GROUP

Do You See What I See?
What's New in QAD 2021.1

Today's Panel

Manager, Solution Architecture

Martin Shertzinger

Sr. Solutions Architect

Amy Vasquez

Sr. Solutions Architect

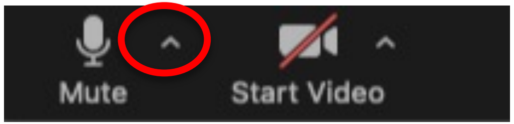
Amanda Goodson

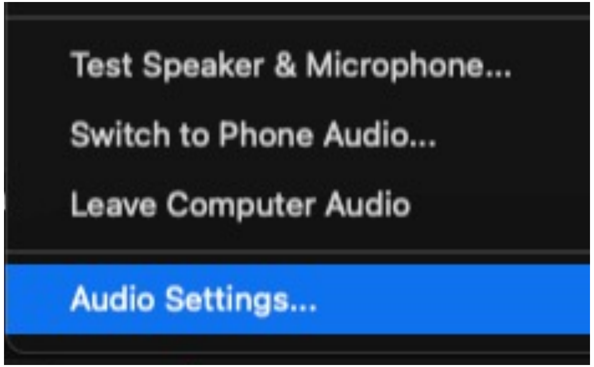
Sr. Director, Marketing

Barbara Ware

Zoom Event: How to Participate

- Join or Change Audio:
  - Click arrow next to Mute button
  - You have the options to set microphone and speakers, test them, adjust volume or switch to phone audio
  - Full audio settings allows you to and change other settings


Mute
Start Video


Test Speaker & Microphone...
Switch to Phone Audio...
Leave Computer Audio
Audio Settings...

Product Release Highlights for 2021.1

2021 Release Highlights

- AUX Enhanced Functionality
  - Financials
  - Purchasing
  - Planning
  - Sales and Shipping
  - Enterprise Asset Management (EAM)
  - Enhanced Controls
  - Analytics – Insights
  - Mobile Platform

2021 Release Highlights - Finance

Revaluations

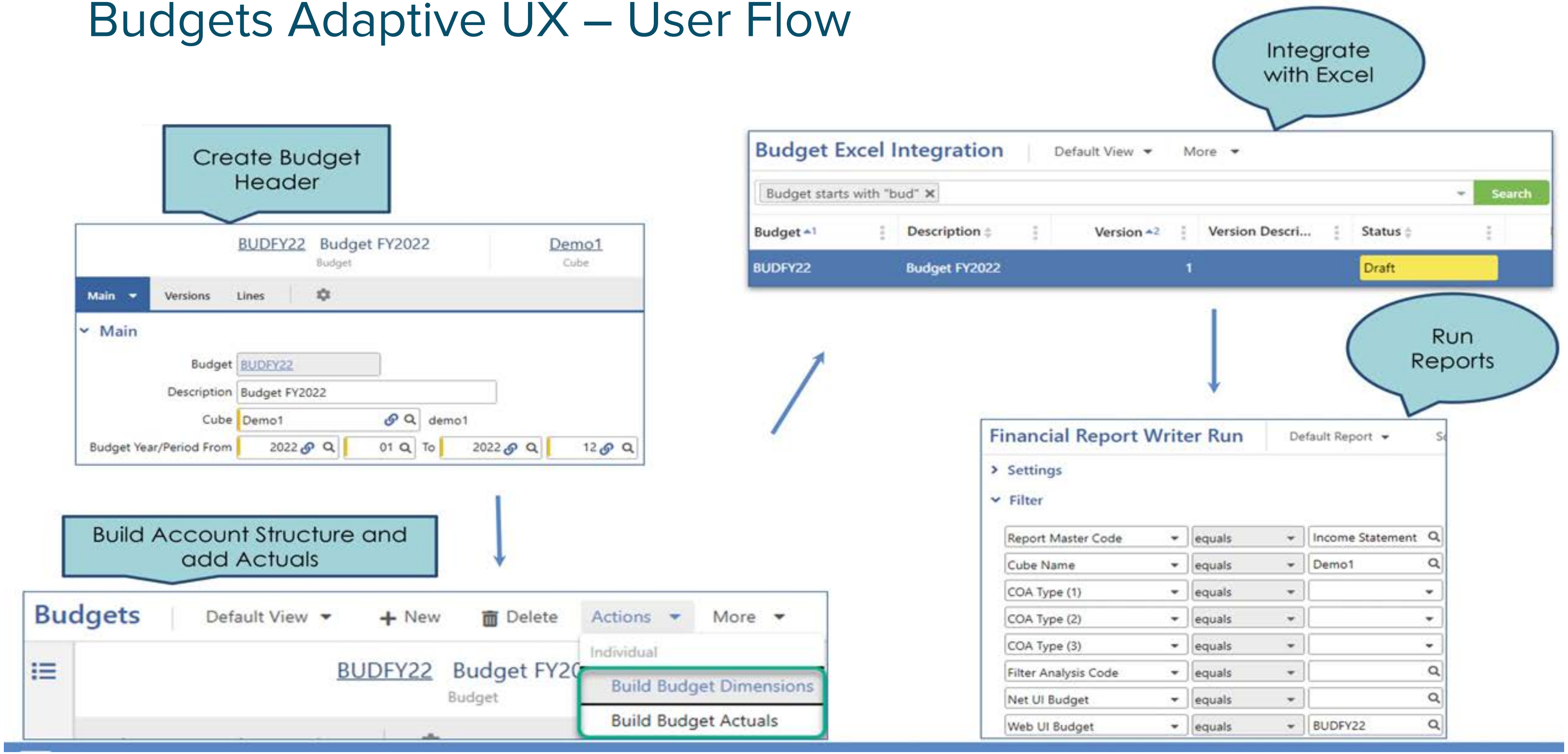
- UI totally redesigned for better usability
- Multi-domain/entity visibility
- Background processing support

Budgets

- Simplified Budget creation
- Budgets and Financial Report Writer more closely aligned
- Chart of accounts dimensions from FRW
- Budget upload with flat Excel integration
- Budget vs Actuals reports
- Easier scenario planning

2021 Release Highlights - Budgets

Budgets Adaptive UX – User Flow


Create Budget Header
Build Account Structure and add Actuals
Integrate with Excel
Run Reports
Main
Versions
Lines
Budgets
Default View
New
Delete
Actions
More
Individual
Build Budget Dimensions
Build Budget Actuals
Budget Excel Integration
Default View
More
Search
Financial Report Writer Run
Default Report
Settings
Filter

BUDFY22 Budget FY2022
Budget

Demo1
Cube

Main

Budget: BUDFY22
Description: Budget FY2022
Cube: Demo1 demo1
Budget Year/Period From: 2022 01 To 2022 12

BUDFY22 Budget FY20
Budget

Budget starts with "bud"

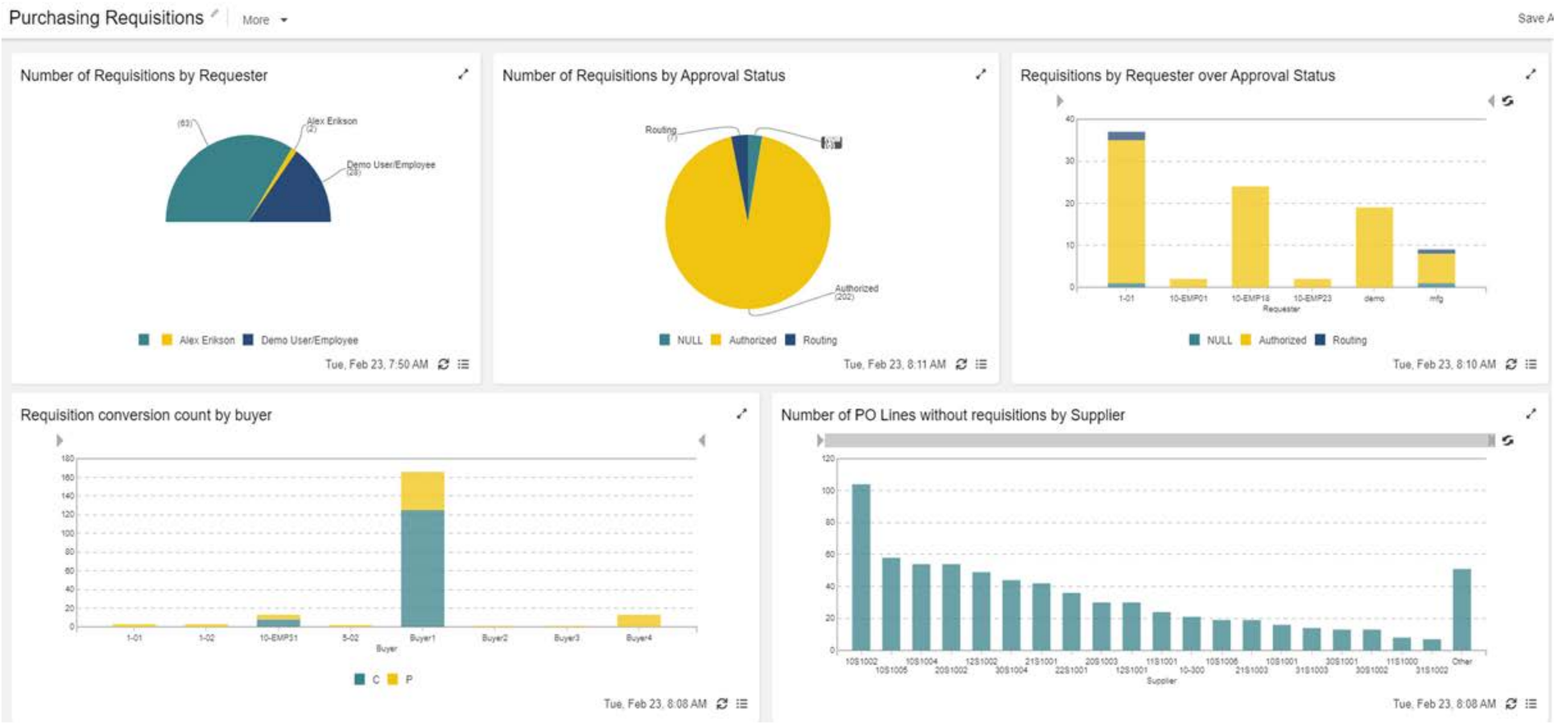
Budget	Description	Version	Version Descri...	Status
BUDFY22	Budget FY2022	1		Draft

Report Master Code	equals	Income Statement
Cube Name	equals	Demo1
COA Type (1)	equals	
COA Type (2)	equals	
COA Type (3)	equals	
Filter Analysis Code	equals	
Net UI Budget	equals	
Web UI Budget	equals	BUDFY22

2021 Release Highlights – Purchasing

- Subcontract
  - Simplified access to Subcontract Purchase Orders from Production
  - Visualization and Action in Production
    - Browse to visualize Subcontract Purchase Orders
    - Ability to visualize receipt status of Subcontract Purchase Order
    - Action to create Subcontract Purchase Order from Production Order
    - Drill-down links between Production Order and Purchase Order
- New Action Center

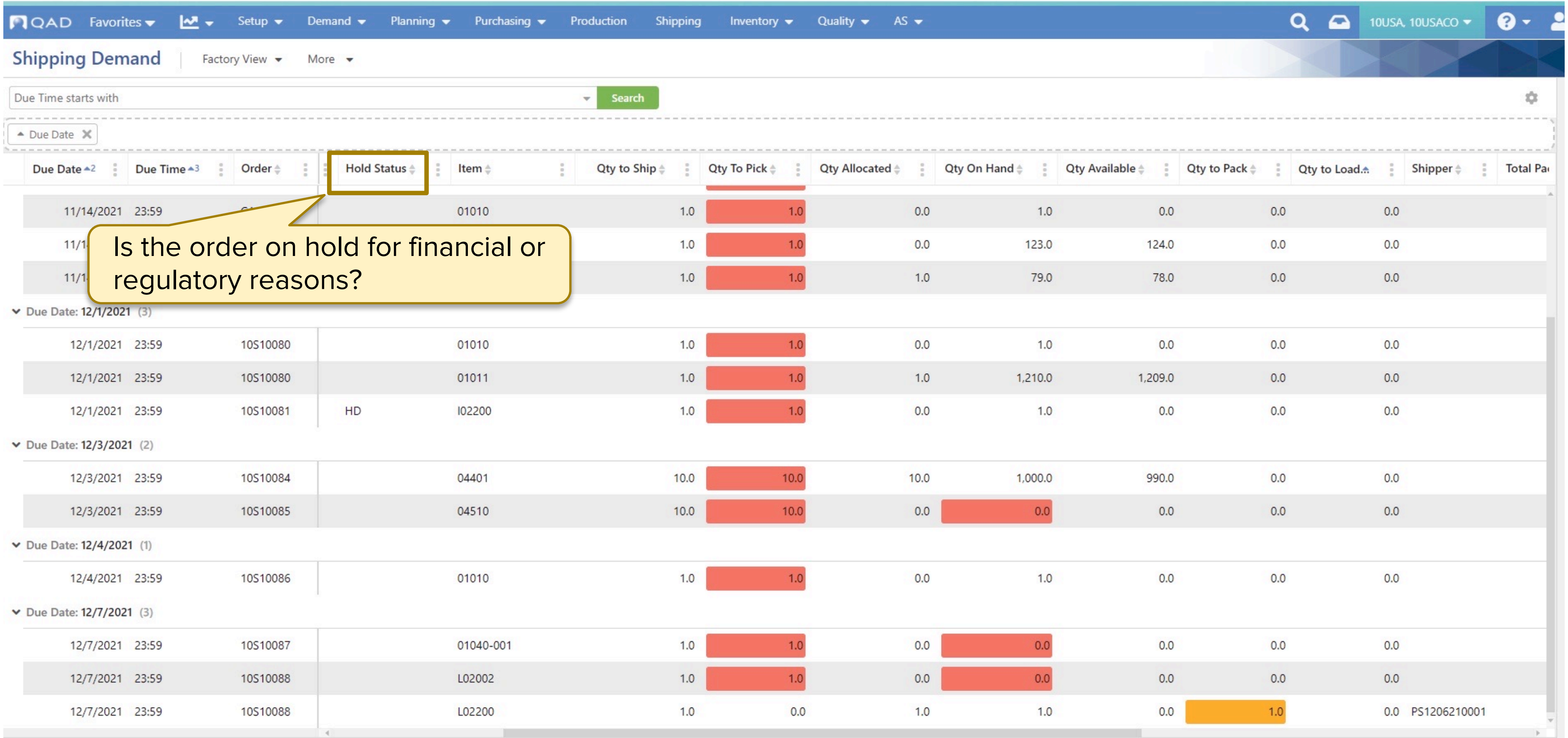
2021 Release Highlights – Action Center


Purchasing Requisitions
More
Save A
Number of Requisitions by Requester
(63)
Alex Erikson
(2)
Demo User/Employee
(28)
Alex Erikson
Demo User/Employee
Tue, Feb 23, 7:50 AM
Number of Requisitions by Approval Status
Routing
(7)
Authorized
(202)
NULL
Authorized
Routing
Tue, Feb 23, 8:11 AM
Requisitions by Requester over Approval Status
40
30
20
10
0
1-01
10-EMP01
10-EMP18
10-EMP23
demo
mfg
Requester
NULL
Authorized
Routing
Tue, Feb 23, 8:10 AM
Requisition conversion count by buyer
180
160
140
120
100
80
60
40
20
0
1-01
1-02
10-EMPS1
5-02
Buyer1
Buyer2
Buyer3
Buyer4
Buyer
C
P
Tue, Feb 23, 8:08 AM
Number of PO Lines without requisitions by Supplier
120
100
80
60
40
20
0
10S1002
10S1005
10S1004
20S1002
12S1002
30S1004
21S1001
22S1001
20S1003
12S1001
11S1001
10-300
10S1006
21S1003
10S1001
31S1003
30S1001
30S1002
11S1000
31S1002
Other
Supplier
Tue, Feb 23, 8:08 AM

2021 Release Highlights – Sales and Shipping

- Actions Button
  - Deallocate in bulk
  - Change due date In bulk
- Shipping Demand Dashboard

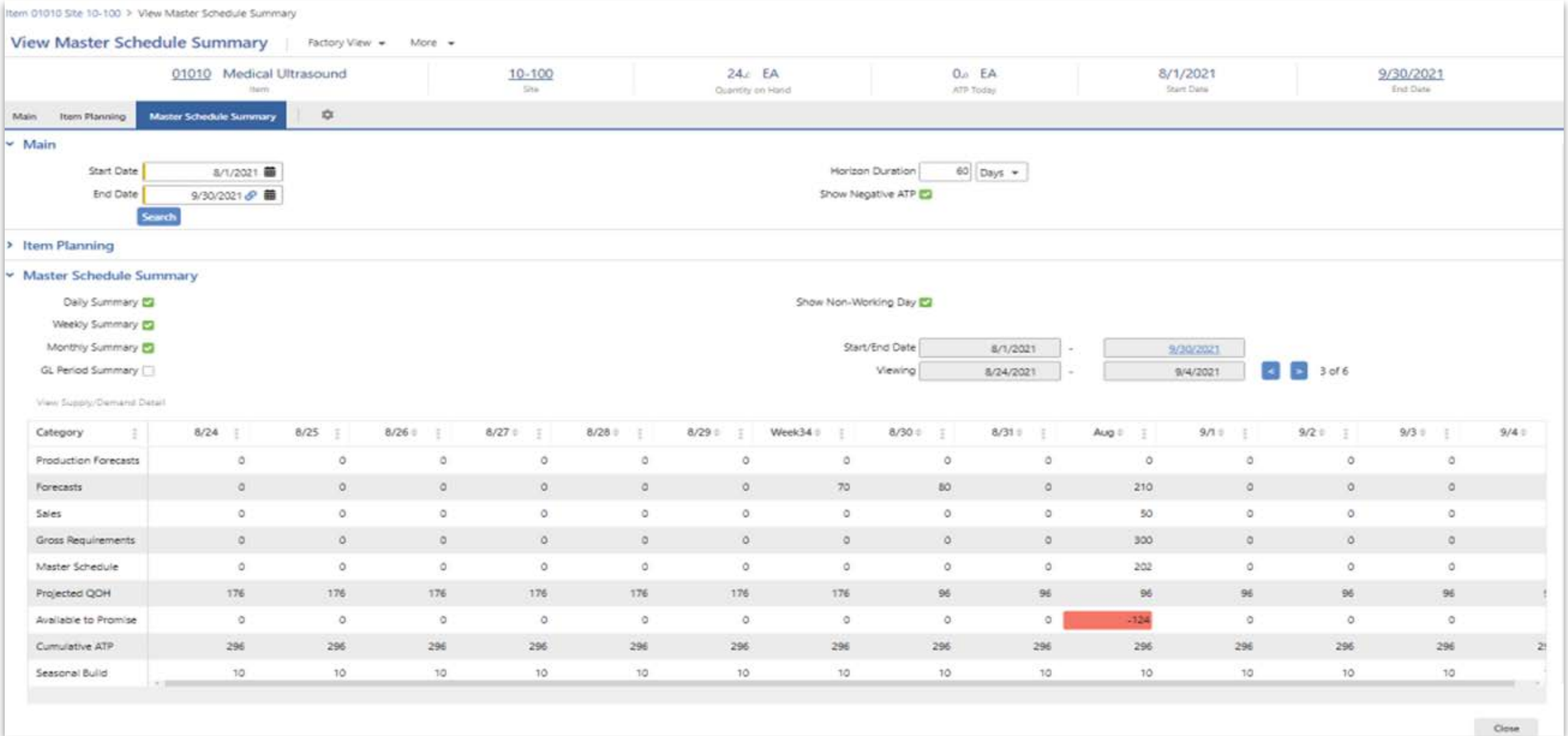
2021 Release Highlights – Sales And Shipping


QAD
Favorites
Setup
Demand
Planning
Purchasing
Production
Shipping
Inventory
Quality
AS
10USA, 10USACO
Shipping Demand
Factory View
More
Due Time starts with
Search
Due Date

Due Date	Due Time	Order	Hold Status	Item	Qty to Ship	Qty To Pick	Qty Allocated	Qty On Hand	Qty Available	Qty to Pack	Qty to Load	Shipper	Total Pa
11/14/2021	23:59			01010	1.0	1.0	0.0	1.0	0.0	0.0	0.0		
11/1					1.0	1.0	0.0	123.0	124.0	0.0	0.0		
11/1					1.0	1.0	1.0	79.0	78.0	0.0	0.0		
Due Date: 12/1/2021 (3)													
12/1/2021	23:59	10S10080		01010	1.0	1.0	0.0	1.0	0.0	0.0	0.0		
12/1/2021	23:59	10S10080		01011	1.0	1.0	1.0	1,210.0	1,209.0	0.0	0.0		
12/1/2021	23:59	10S10081	HD	I02200	1.0	1.0	0.0	1.0	0.0	0.0	0.0		
Due Date: 12/3/2021 (2)													
12/3/2021	23:59	10S10084		04401	10.0	10.0	10.0	1,000.0	990.0	0.0	0.0		
12/3/2021	23:59	10S10085		04510	10.0	10.0	0.0	0.0	0.0	0.0	0.0		
Due Date: 12/4/2021 (1)													
12/4/2021	23:59	10S10086		01010	1.0	1.0	0.0	1.0	0.0	0.0	0.0		
Due Date: 12/7/2021 (3)													
12/7/2021	23:59	10S10087		01040-001	1.0	1.0	0.0	0.0	0.0	0.0	0.0		
12/7/2021	23:59	10S10088		L02002	1.0	1.0	0.0	0.0	0.0	0.0	0.0		
12/7/2021	23:59	10S10088		L02200	1.0	0.0	1.0	1.0	0.0	1.0	0.0	PS1206210001	

Is the order on hold for financial or regulatory reasons?

2021 Release Highlights - Planning



Item 01010 Site 10-100 > View Master Schedule Summary

View Master Schedule Summary

01010 Medical Ultrasound
Item

10-100
Site

24. EA
Quantity on Hand

0. EA
ATP Today

8/1/2021
Start Date

9/30/2021
End Date

Main

Start Date 8/1/2021
End Date 9/30/2021

Horizon Duration 60 Days
Show Negative ATP ☑

Item Planning

Master Schedule Summary

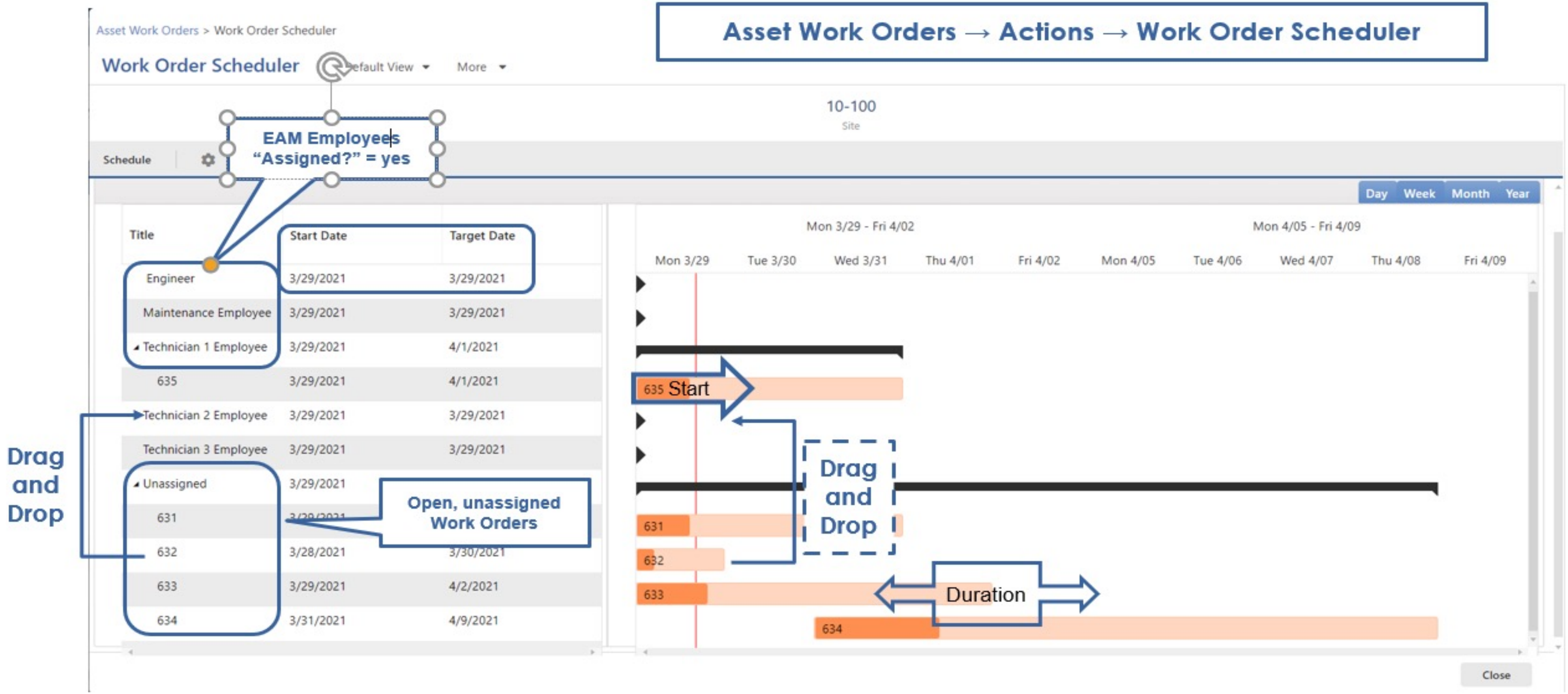
Daily Summary ☑
Weekly Summary ☑
Monthly Summary ☑
GL Period Summary ☐

Show Non-Working Day ☑

Start/End Date 8/1/2021 - 9/30/2021
Viewing 8/24/2021 - 9/4/2021
3 of 6

Category	8/24	8/25	8/26	8/27	8/28	8/29	Week34	8/30	8/31	Aug	9/1	9/2	9/3	9/4
Production Forecasts	0	0	0	0	0	0	0	0	0	0	0	0	0	
Forecasts	0	0	0	0	0	0	70	80	0	210	0	0	0	
Sales	0	0	0	0	0	0	0	0	0	50	0	0	0	
Gross Requirements	0	0	0	0	0	0	0	0	0	300	0	0	0	
Master Schedule	0	0	0	0	0	0	0	0	0	202	0	0	0	
Projected QOH	176	176	176	176	176	176	176	96	96	96	96	96	96	
Available to Promise	0	0	0	0	0	0	0	0	0	-124	0	0	0	
Cumulative ATP	296	296	296	296	296	296	296	296	296	296	296	296	296	
Seasonal Build	10	10	10	10	10	10	10	10	10	10	10	10	10	

2021 Release Highlights - EAM



Asset Work Orders → Actions → Work Order Scheduler

Asset Work Orders > Work Order Scheduler

Work Order Scheduler

10-100
Site

EAM Employees "Assigned?" = yes

Title	Start Date	Target Date
Engineer	3/29/2021	3/29/2021
Maintenance Employee	3/29/2021	3/29/2021
Technician 1 Employee	3/29/2021	4/1/2021
635	3/29/2021	4/1/2021
Technician 2 Employee	3/29/2021	3/29/2021
Technician 3 Employee	3/29/2021	3/29/2021
Unassigned	3/29/2021	
631	3/29/2021	
632	3/28/2021	3/30/2021
633	3/29/2021	4/2/2021
634	3/31/2021	4/9/2021

Open, unassigned Work Orders

Drag and Drop

Start

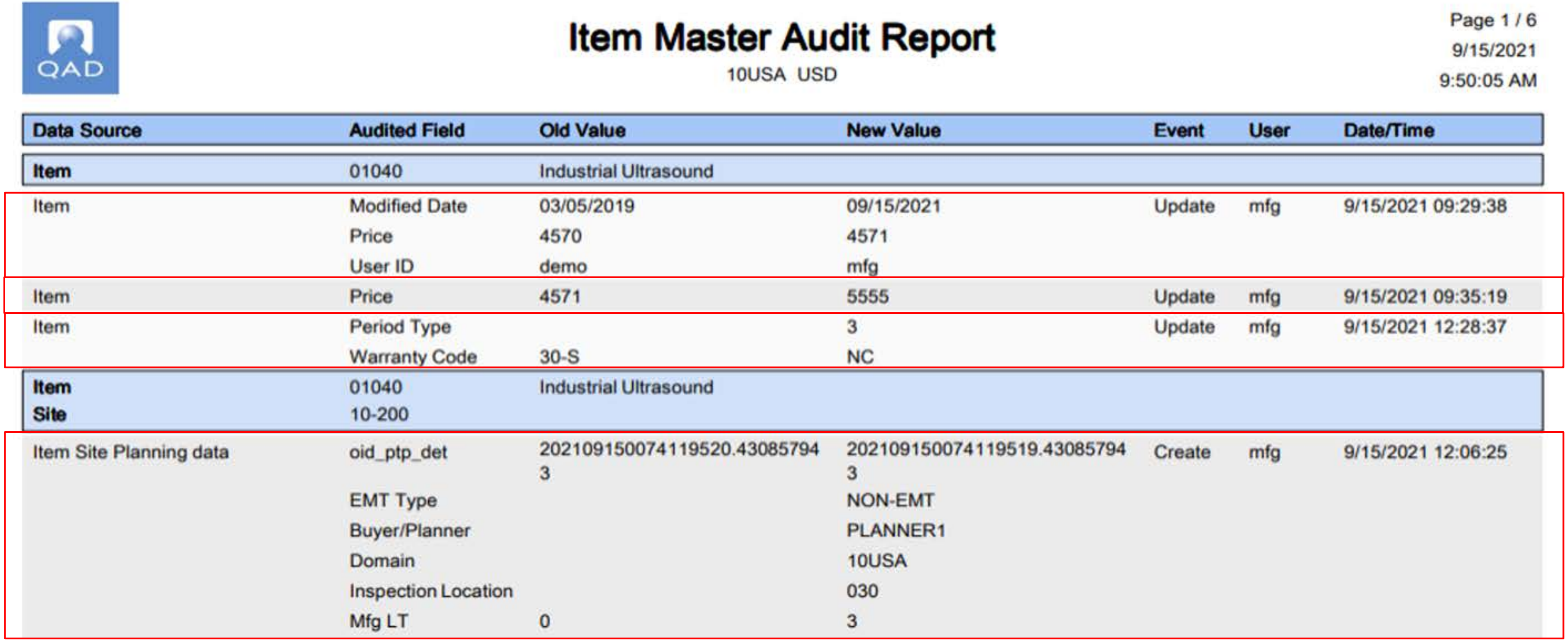
Duration

Default View
More
Schedule
Day
Week
Month
Year
Mon 3/29 - Fri 4/02
Mon 4/05 - Fri 4/09
Mon 3/29
Tue 3/30
Wed 3/31
Thu 4/01
Fri 4/02
Mon 4/05
Tue 4/06
Wed 4/07
Thu 4/08
Fri 4/09
635
631
632
633
634
Close

2021 Release Highlights – Enhanced Controls

- Audit Trail reports targeted for end users - Easy to run and read output
- ✓ Related tables and records shown together
- Report output as pdf or Excel format
- Reports cover all main business documents

2021 Release Highlights – Enhanced Controls



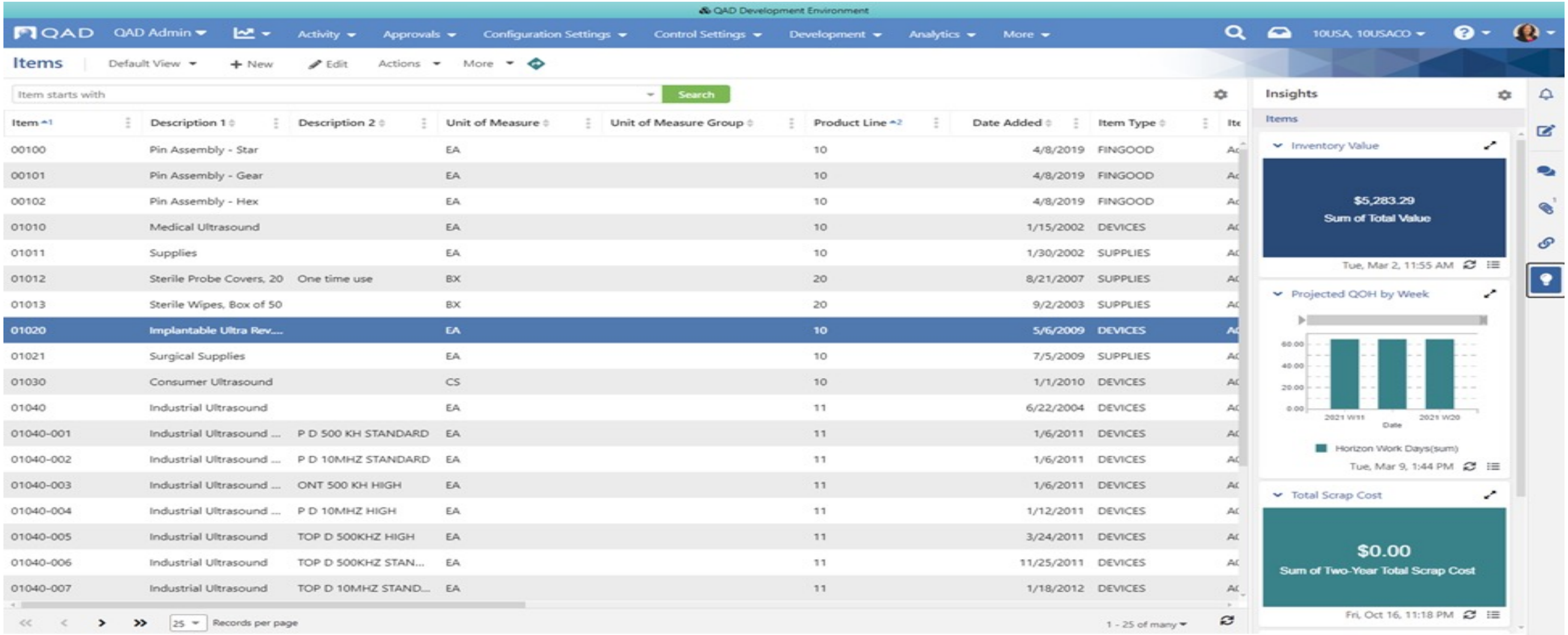
Item Master Audit Report

10USA USD

Page 1 / 6
9/15/2021
9:50:05 AM

Data Source	Audited Field	Old Value	New Value	Event	User	Date/Time
Item	01040	Industrial Ultrasound				
Item	Modified Date	03/05/2019	09/15/2021	Update	mfg	9/15/2021 09:29:38
	Price	4570	4571			
	User ID	demo	mfg			
Item	Price	4571	5555	Update	mfg	9/15/2021 09:35:19
Item	Period Type		3	Update	mfg	9/15/2021 12:28:37
	Warranty Code	30-S	NC			
Item	01040	Industrial Ultrasound				
Site	10-200					
Item Site Planning data	oid_ptp_det	202109150074119520.430857943	202109150074119519.430857943	Create	mfg	9/15/2021 12:06:25
	EMT Type		NON-EMT			
	Buyer/Planner		PLANNER1			
	Domain		10USA			
	Inspection Location		030			
	Mfg LT	0	3			

2021 Release Highlights - Insights


QAD Development Environment
QAD
QAD Admin
Activity
Approvals
Configuration Settings
Control Settings
Development
Analytics
More
10USA, 10USACO
Items
Default View
+ New
Edit
Actions
More
Item starts with
Search
Insights
Items
Inventory Value
Projected QOH by Week
60.00
40.00
20.00
0.00
2021 W11
2021 W20
Date
Horizon Work Days(sum)
Total Scrap Cost
25
Records per page
1 - 25 of many

Item	Description 1	Description 2	Unit of Measure	Unit of Measure Group	Product Line	Date Added	Item Type	Ite
00100	Pin Assembly - Star		EA		10	4/8/2019	FINGOOD	Ac
00101	Pin Assembly - Gear		EA		10	4/8/2019	FINGOOD	Ac
00102	Pin Assembly - Hex		EA		10	4/8/2019	FINGOOD	Ac
01010	Medical Ultrasound		EA		10	1/15/2002	DEVICES	AC
01011	Supplies		EA		10	1/30/2002	SUPPLIES	AC
01012	Sterile Probe Covers, 20	One time use	BX		20	8/21/2007	SUPPLIES	AC
01013	Sterile Wipes, Box of 50		BX		20	9/2/2003	SUPPLIES	AC
01020	Implantable Ultra Rev....		EA		10	5/6/2009	DEVICES	AC
01021	Surgical Supplies		EA		10	7/5/2009	SUPPLIES	AC
01030	Consumer Ultrasound		CS		10	1/1/2010	DEVICES	AC
01040	Industrial Ultrasound		EA		11	6/22/2004	DEVICES	AC
01040-001	Industrial Ultrasound ...	P D 500 KH STANDARD	EA		11	1/6/2011	DEVICES	AC
01040-002	Industrial Ultrasound ...	P D 10MHZ STANDARD	EA		11	1/6/2011	DEVICES	AC
01040-003	Industrial Ultrasound ...	ONT 500 KH HIGH	EA		11	1/6/2011	DEVICES	AC
01040-004	Industrial Ultrasound ...	P D 10MHZ HIGH	EA		11	1/12/2011	DEVICES	AC
01040-005	Industrial Ultrasound	TOP D 500KHZ HIGH	EA		11	3/24/2011	DEVICES	AC
01040-006	Industrial Ultrasound	TOP D 500KHZ STAN...	EA		11	11/25/2011	DEVICES	AC
01040-007	Industrial Ultrasound	TOP D 10MHZ STAND...	EA		11	1/18/2012	DEVICES	AC

Inventory Value

$5,283.29
Sum of Total Value
Tue, Mar 2, 11:55 AM

Projected QOH by Week
Tue, Mar 9, 1:44 PM

Total Scrap Cost

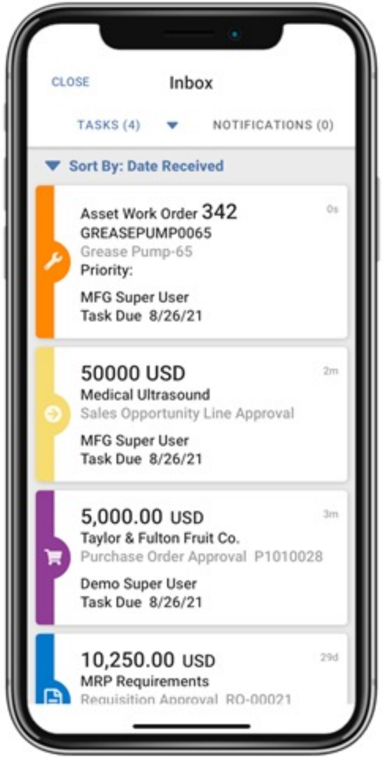
$0.00
Sum of Two-Year Total Scrap Cost
Fri, Oct 16, 11:18 PM

2021 Release Highlights

Mobile Platform

- Attachments
- Activity Feed
- Browse advanced search enhancements
- Inbox Tasks
- Inbox generic approvals
  - Asset Work Orders
  - Sales Opportunity
  - Sales Opportunity Line
  - Supplier Payment Selections
  - Supplier Invoice
  - Purchase Order
  - Requisition Approval

2021 Release Highlights – Mobile Platform


CLOSE
Inbox
TASKS (4)
NOTIFICATIONS (0)

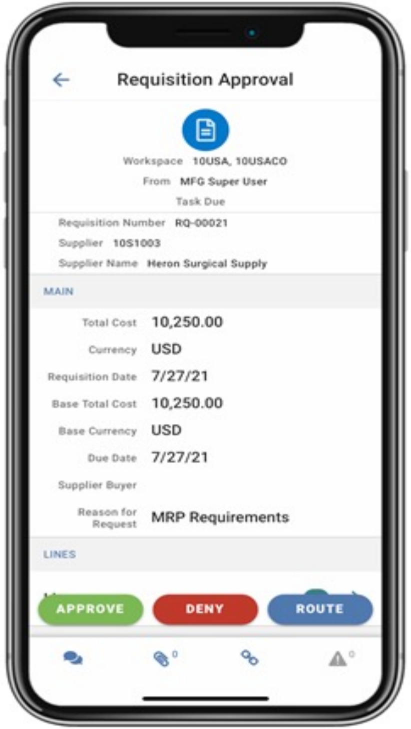
Sort By: Date Received

Asset Work Order 342
GREASEPUMP0065
Grease Pump-65
Priority:
MFG Super User
Task Due 8/26/21
0s

50000 USD
Medical Ultrasound
Sales Opportunity Line Approval
MFG Super User
Task Due 8/26/21
2m

5,000.00 USD
Taylor & Fulton Fruit Co.
Purchase Order Approval P1010028
Demo Super User
Task Due 8/26/21
3m

10,250.00 USD
MRP Requirements
Requisition Approval RQ-00021
29d


Requisition Approval

Workspace 10USA, 10USACO
From MFG Super User
Task Due

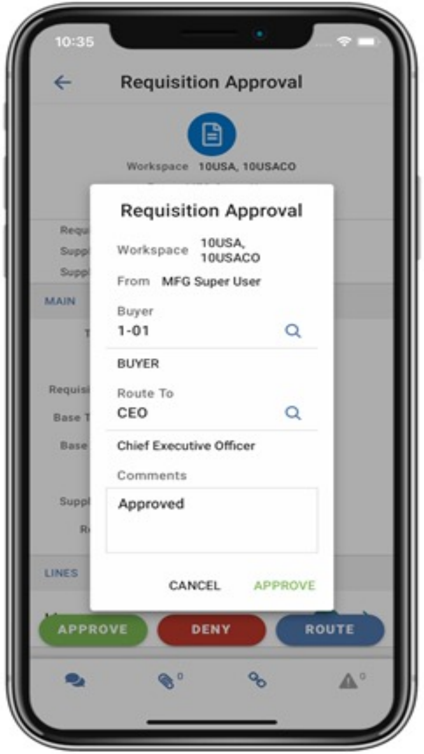
Requisition Number RQ-00021
Supplier 10S1003
Supplier Name Heron Surgical Supply

MAIN

Total Cost	10,250.00
Currency	USD
Requisition Date	7/27/21
Base Total Cost	10,250.00
Base Currency	USD
Due Date	7/27/21
Supplier Buyer	
Reason for Request	MRP Requirements

LINES

APPROVE
DENY
ROUTE


10:35
Requisition Approval

Workspace 10USA, 10USACO

Requisition Approval

Workspace 10USA, 10USACO
From MFG Super User
Buyer
1-01
BUYER
Route To
CEO
Chief Executive Officer
Comments
Approved

CANCEL
APPROVE
MAIN
LINES
APPROVE
DENY
ROUTE

2021 Release Highlights

- Supplier Portal now renamed to QAD Demand And Delivery
- New Acquisition– QAD Allocations Supplier Relations Management
- QAD's Trade Activity Management solution is no longer an add-on product
- QAD Precision GTTE
  - Import Management
  - Free Trade Agreements (FTA)

Amy's Favorite QAD Gifts

Amy's QAD AUX Favorites

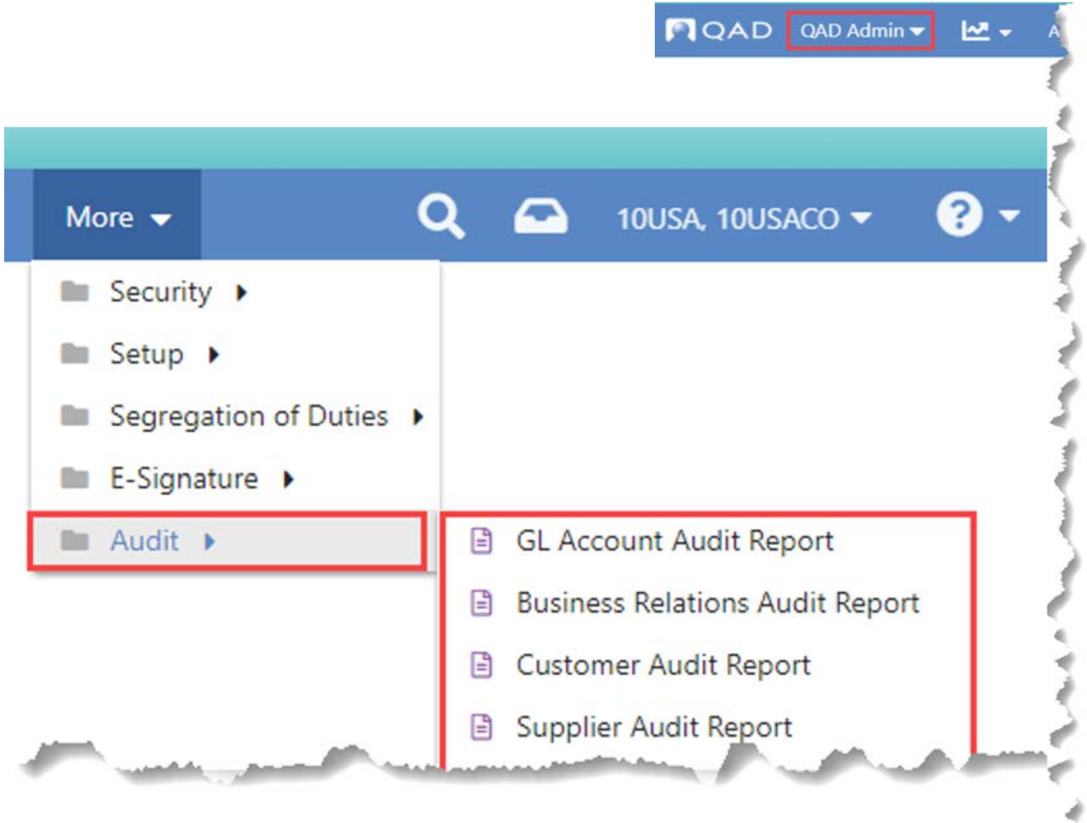
Enhanced Controls
- * Audit Trails
- * eSignatures

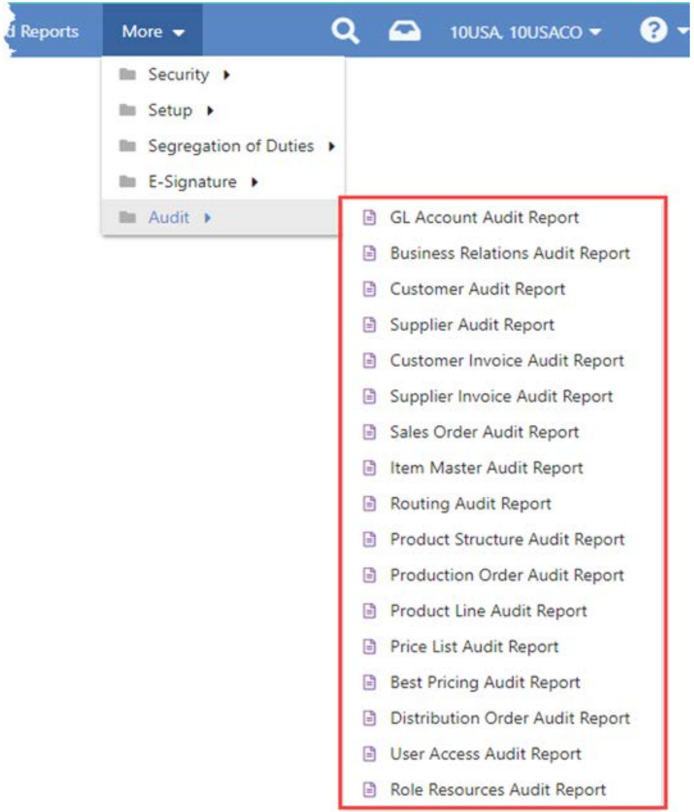
Excel Integration
- * Export
- * Export with Import

Planned Orders
- * Purchasing
- * Production

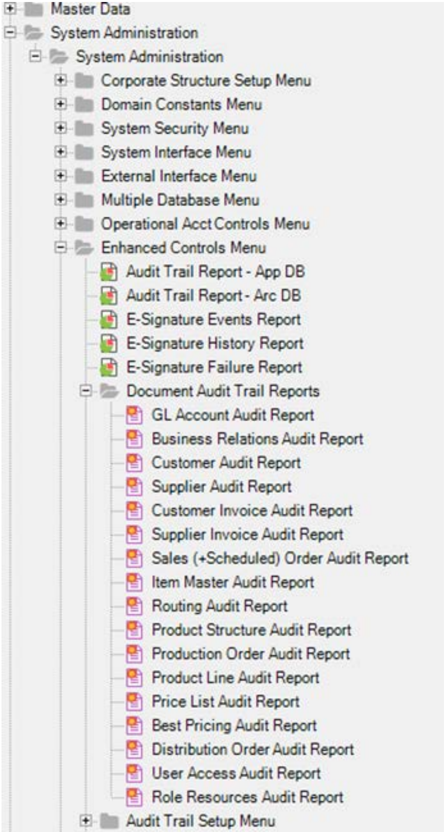
CRM

Access the reports - Web UI

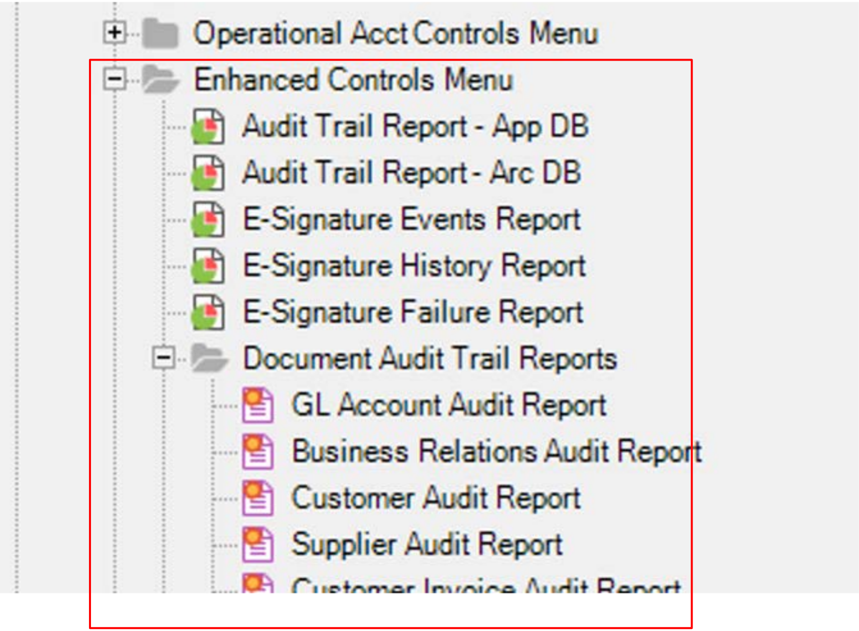

QAD
QAD Admin
More
10USA, 10USACO
Security
Setup
Segregation of Duties
E-Signature
Audit
GL Account Audit Report
Business Relations Audit Report
Customer Audit Report
Supplier Audit Report


Reports
More
10USA, 10USACO
Security
Setup
Segregation of Duties
E-Signature
Audit
GL Account Audit Report
Business Relations Audit Report
Customer Audit Report
Supplier Audit Report
Customer Invoice Audit Report
Supplier Invoice Audit Report
Sales Order Audit Report
Item Master Audit Report
Routing Audit Report
Product Structure Audit Report
Production Order Audit Report
Product Line Audit Report
Price List Audit Report
Best Pricing Audit Report
Distribution Order Audit Report
User Access Audit Report
Role Resources Audit Report

Access the reports - .NET UI

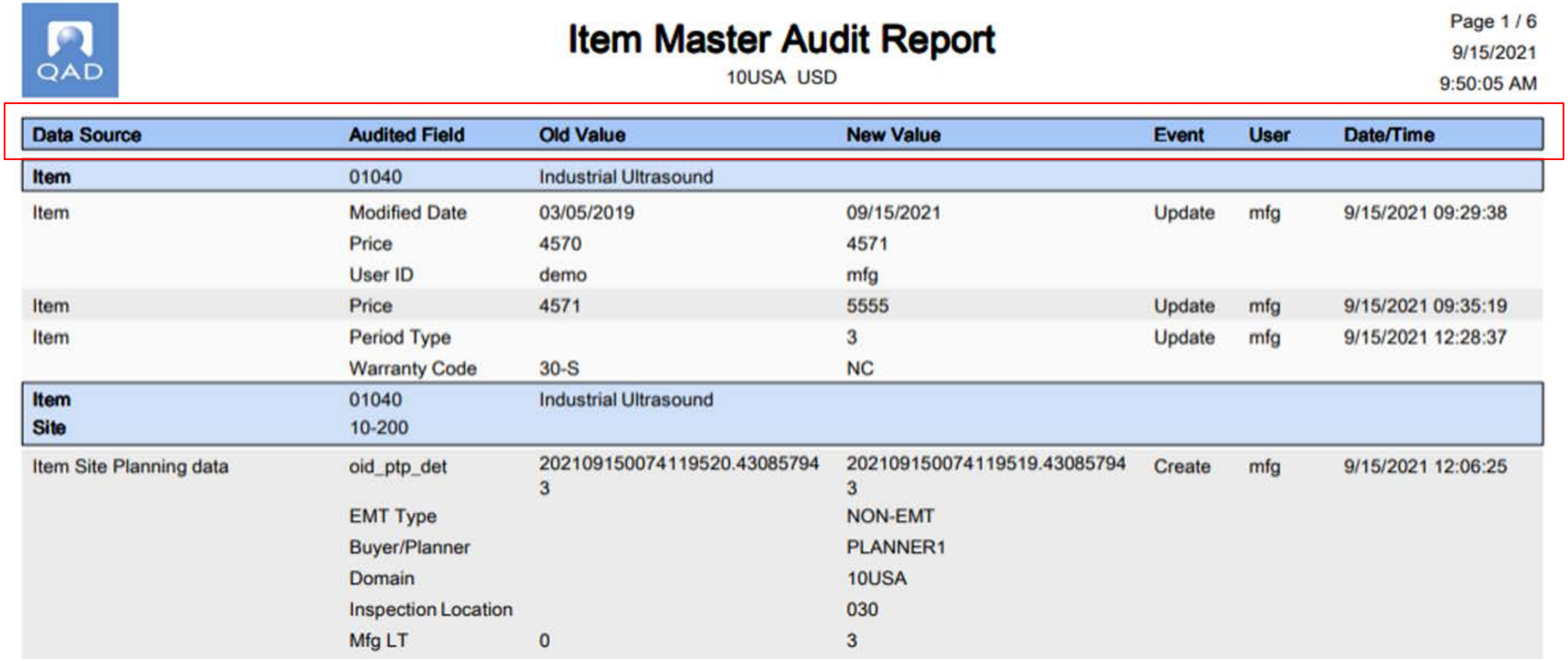


- Master Data
- System Administration
  - System Administration
    - Corporate Structure Setup Menu
    - Domain Constants Menu
    - System Security Menu
    - System Interface Menu
    - External Interface Menu
    - Multiple Database Menu
    - Operational Acct Controls Menu
    - Enhanced Controls Menu
      - Audit Trail Report - App DB
      - Audit Trail Report - Arc DB
      - E-Signature Events Report
      - E-Signature History Report
      - E-Signature Failure Report
      - Document Audit Trail Reports
        - GL Account Audit Report
        - Business Relations Audit Report
        - Customer Audit Report
        - Supplier Audit Report
        - Customer Invoice Audit Report
        - Supplier Invoice Audit Report
        - Sales (+Scheduled) Order Audit Report
        - Item Master Audit Report
        - Routing Audit Report
        - Product Structure Audit Report
        - Production Order Audit Report
        - Product Line Audit Report
        - Price List Audit Report
        - Best Pricing Audit Report
        - Distribution Order Audit Report
        - User Access Audit Report
        - Role Resources Audit Report
      - Audit Trail Setup Menu



- Operational Acct Controls Menu
- Enhanced Controls Menu
  - Audit Trail Report - App DB
  - Audit Trail Report - Arc DB
  - E-Signature Events Report
  - E-Signature History Report
  - E-Signature Failure Report
  - Document Audit Trail Reports
    - GL Account Audit Report
    - Business Relations Audit Report
    - Customer Audit Report
    - Supplier Audit Report
    - Customer Invoice Audit Report

Output format - Column labels



Item Master Audit Report

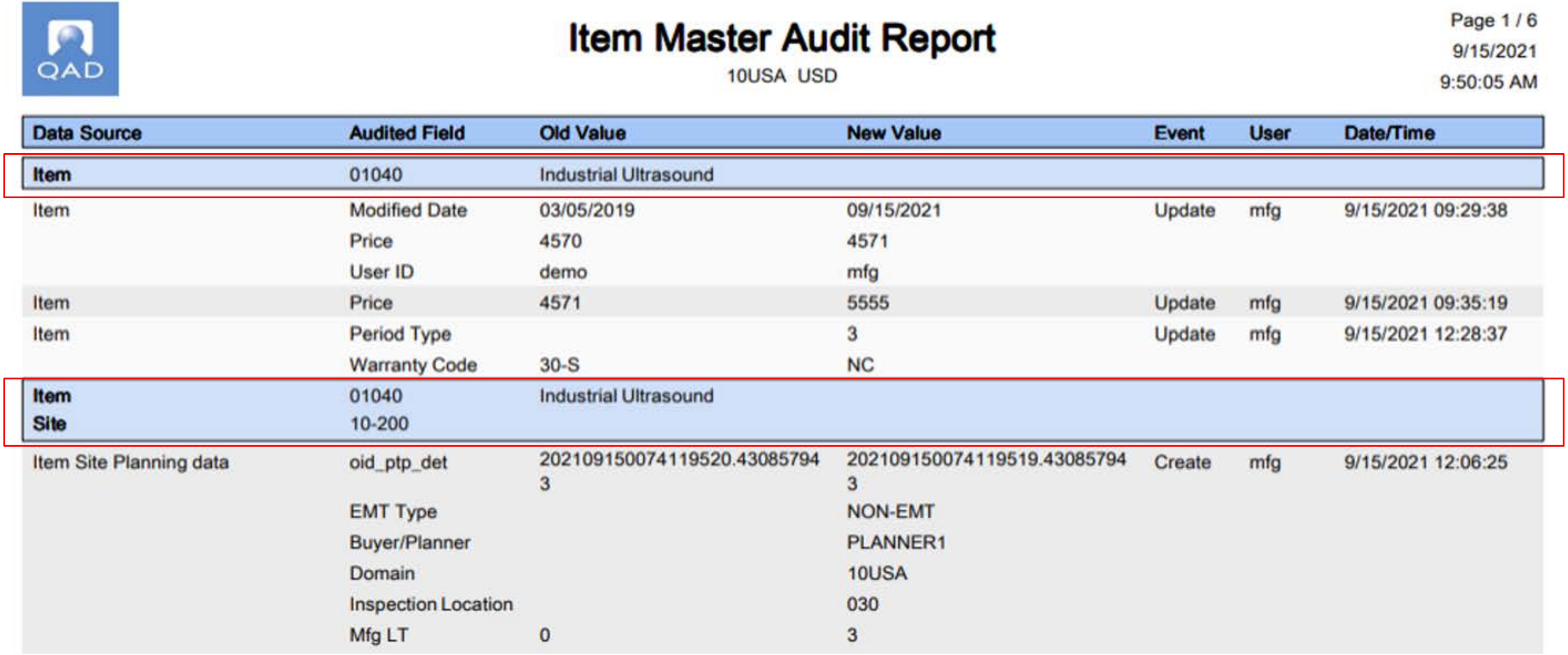
10USA USD

Page 1 / 6
9/15/2021
9:50:05 AM

Data Source	Audited Field	Old Value	New Value	Event	User	Date/Time
Item	01040	Industrial Ultrasound				
Item	Modified Date	03/05/2019	09/15/2021	Update	mfg	9/15/2021 09:29:38
	Price	4570	4571			
	User ID	demo	mfg			
Item	Price	4571	5555	Update	mfg	9/15/2021 09:35:19
Item	Period Type		3	Update	mfg	9/15/2021 12:28:37
	Warranty Code	30-S	NC			
Item **Site**	01040 10-200	Industrial Ultrasound				
Item Site Planning data	oid_ptp_det	202109150074119520.430857943	202109150074119519.430857943	Create	mfg	9/15/2021 12:06:25
	EMT Type		NON-EMT			
	Buyer/Planner		PLANNER1			
	Domain		10USA			
	Inspection Location		030			
	Mfg LT	0	3			

Enhanced Controls - Audit Reports

Output format - Record identification



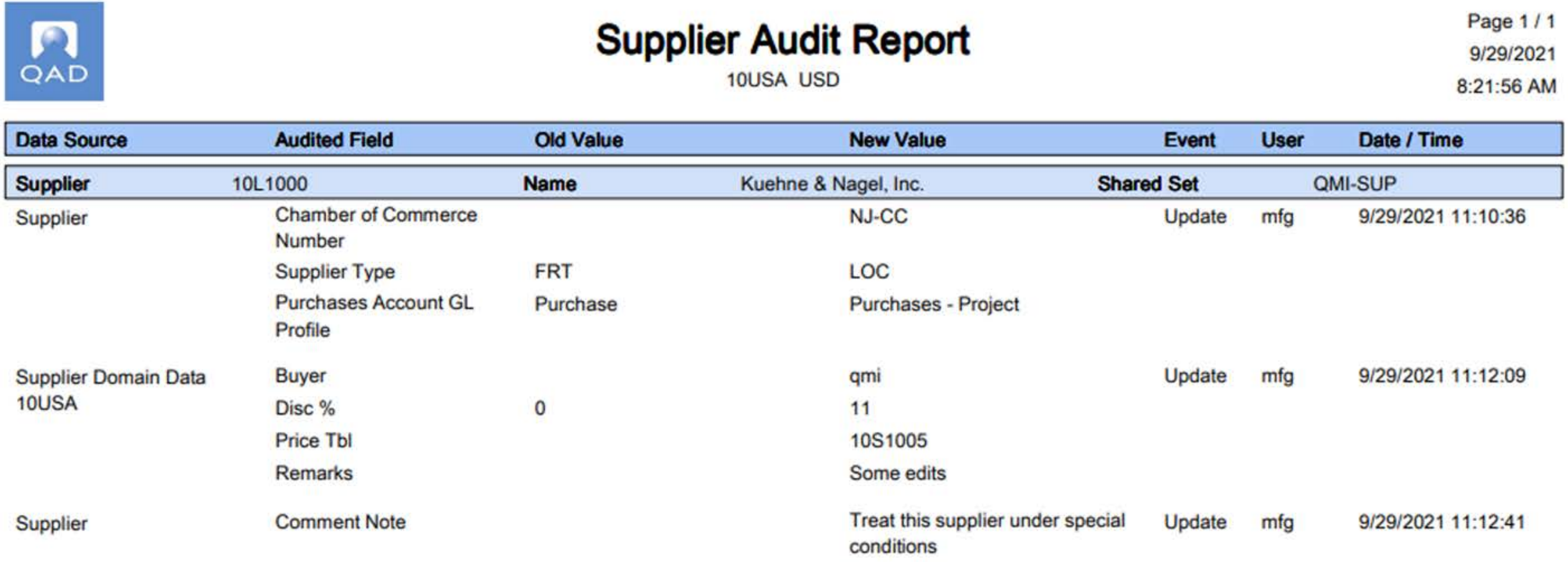
Item Master Audit Report

10USA USD

Page 1 / 6
9/15/2021
9:50:05 AM

Data Source	Audited Field	Old Value	New Value	Event	User	Date/Time
Item	01040	Industrial Ultrasound				
Item	Modified Date	03/05/2019	09/15/2021	Update	mfg	9/15/2021 09:29:38
	Price	4570	4571			
	User ID	demo	mfg			
Item	Price	4571	5555	Update	mfg	9/15/2021 09:35:19
Item	Period Type		3	Update	mfg	9/15/2021 12:28:37
	Warranty Code	30-S	NC			
Item **Site**	01040 10-200	Industrial Ultrasound				
Item Site Planning data	oid_ptp_det	202109150074119520.430857943	202109150074119519.430857943	Create	mfg	9/15/2021 12:06:25
	EMT Type		NON-EMT			
	Buyer/Planner		PLANNER1			
	Domain		10USA			
	Inspection Location		030			
	Mfg LT	0	3			

Consistent output format



Supplier Audit Report

10USA USD

Page 1 / 1
9/29/2021
8:21:56 AM

Data Source	Audited Field	Old Value	New Value	Event	User	Date / Time
Supplier 10L1000	**Name**	Kuehne & Nagel, Inc.	**Shared Set**	QMI-SUP		
Supplier	Chamber of Commerce Number		NJ-CC	Update	mfg	9/29/2021 11:10:36
	Supplier Type	FRT	LOC			
	Purchases Account GL Profile	Purchase	Purchases - Project			
Supplier Domain Data 10USA	Buyer		qmi	Update	mfg	9/29/2021 11:12:09
	Disc %	0	11			
	Price Tbl		10S1005			
	Remarks		Some edits			
Supplier	Comment Note		Treat this supplier under special conditions	Update	mfg	9/29/2021 11:12:41

Demo

Amanda's Favorite QAD Gifts

Amanda's QAD AUX Favorites

Action Centers and KPIs

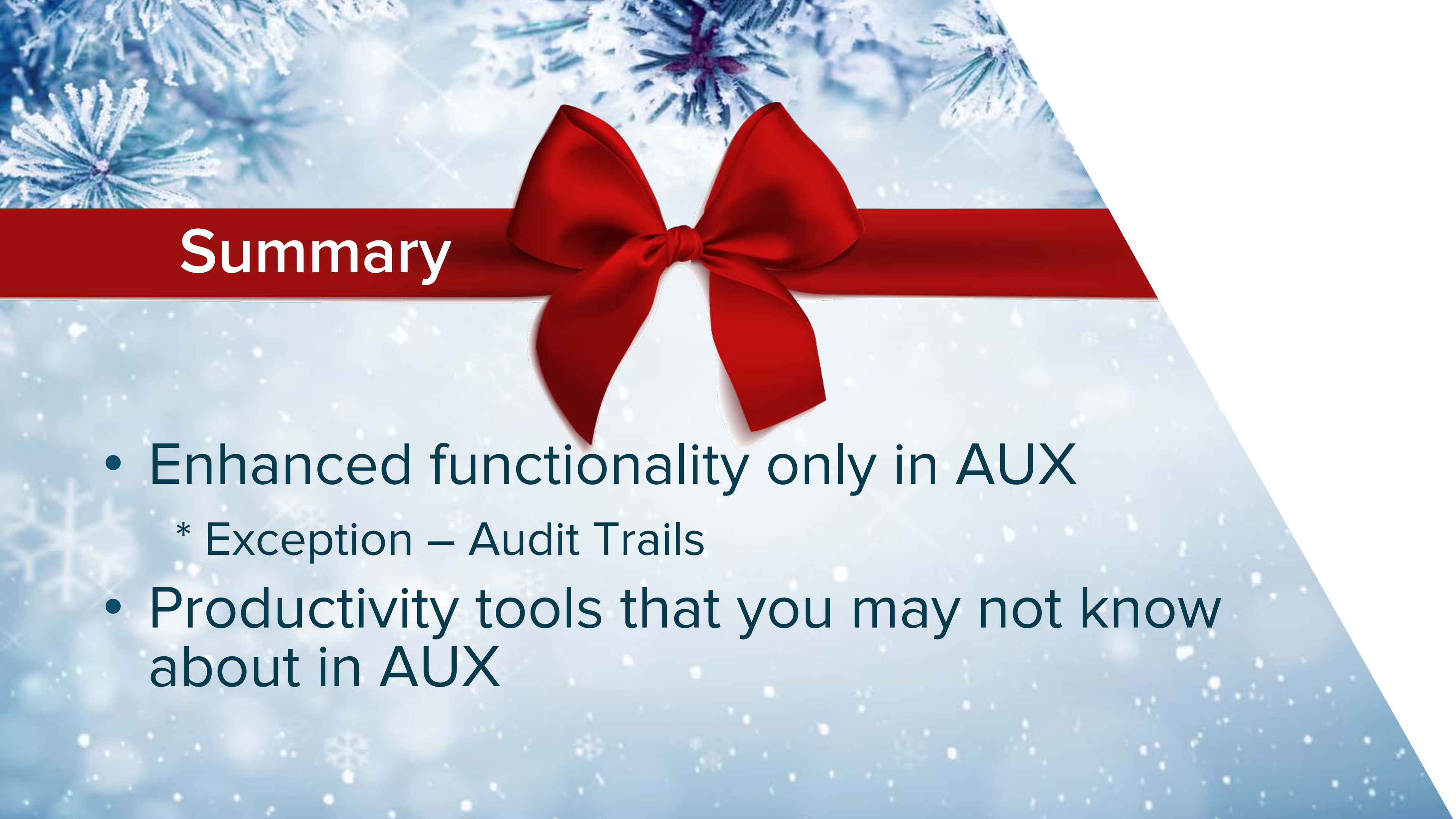
* Data Analytics

* Drill Throughs

FRW: Departmental OPEX Budget vs Actual Reporting

Collaboration and Attachments

Demo



Summary

- Enhanced functionality only in AUX
  * Exception – Audit Trails
- Productivity tools that you may not know about in AUX

Questions?

sales@strategic.com

Strategic

INFORMATION GROUP

www.strategic.com