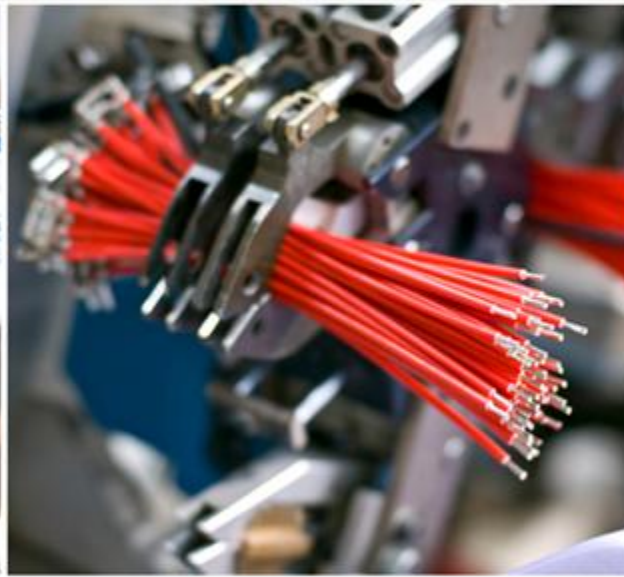# Menus to Processes

Richard Day, Senior Product Manager

Agenda

- QAD Overview
- Moving from Menus to Processes
- The QAD Approach
- Demonstration
- Current Status
- Future Plans
- Questions

QAD Overview

Established: 1979

Revenue: $252 M (FY13)

Employees: 1,540 worldwide

Headquarters: Santa Barbara, CA

Operations: 19 Countries

Customers: 2,800 Companies
97 Countries
30 Languages

Product: QAD Enterprise Applications

Stock: NASDAQ: QADA, QADB

Automotive · Life Sciences · High Tech
Industrial · Consumer Products · Food and Beverage

Customers

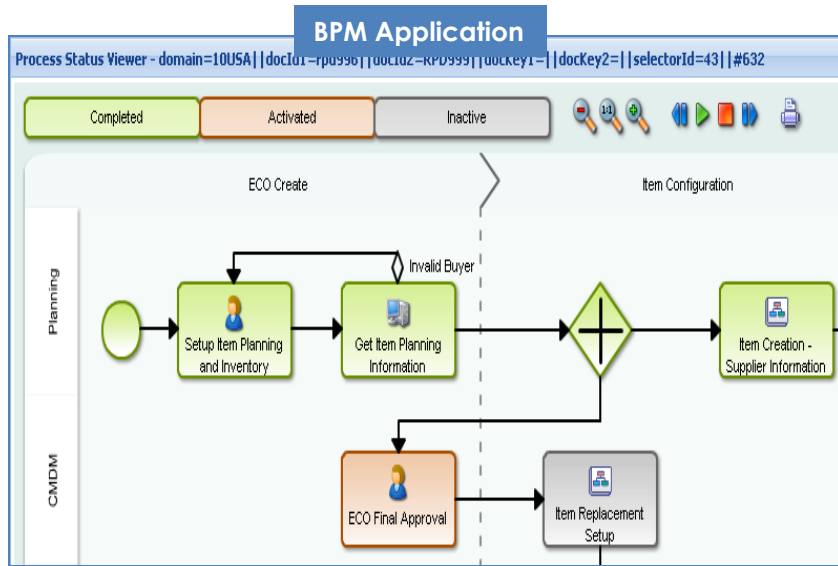| Automotive Parts	Consumer Products	Food & Beverage	High Technology	Industrial Products	Life Sciences
KYB	Alliance Boots	MADETA	PROGRESS software	SAINT-GOBAIN	gsk
DELPHI	PZ Cussons	KRAFT	FCi	CATERPILLAR	Transitions
TOWER AUTOMOTIVE	AVERY DENNISON	GORTON'S SINCE 1849	Anritsu	YAMAHA Revs Your Heart	COVIDIEN
LEAR CORPORATION	DAVID YURMAN	SUN·MAID	FEI	CRANE	BARD
Freudenberg	GORE Creative Technologies Worldwide	LION	GE	BOBST	COMVITA
akebono	Imperial Tobacco	FARM FRITES	Cascade Microtech	MUELLER INDUSTRIES, INC.	medela
TRW	dacor	Yoplait	CoorsTek Amazing Solutions	amcor	VALEANT Pharmaceuticals International, Inc.
Visteon	AGIO ROYAL CIGARS CIGAR MAKERS SINCE 1904	Q catering	A.J. Antunes & Co.	Albany Filtration Technologies	Arthrex
DURA Automotive Systems		BAKKERSLAND International	gemalto	AO Smith Innovation has a name.	PHYSIO CONTROL
HENDRICKSON The World Rides On Us			Laird TECHNOLOGIES	WATTS WATER TECHNOLOGIES	stryker
metaldyne					

Moving from Menus to Processes

Maps to Navigation

Menu Driven Systems
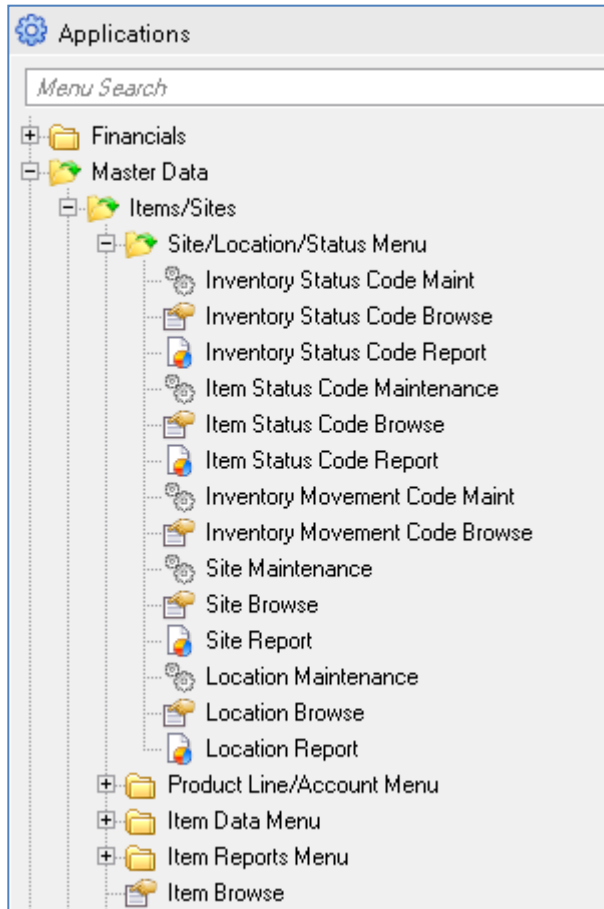
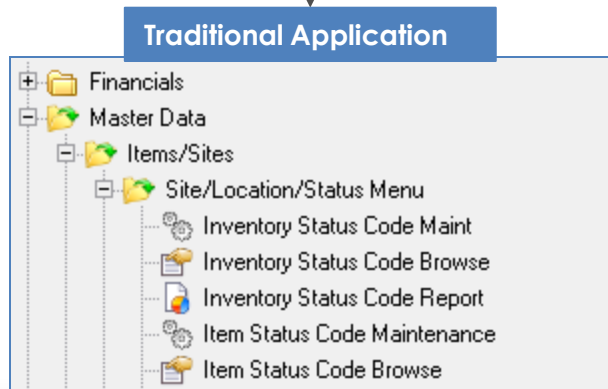
- Processes hidden
- No active monitoring
- Difficult to manage
- No task ownership
- Difficult to adapt
- Unaware of status

Process Driven Systems

BPM Application

Process Status Viewer - domain=10USA||docId1=rpd996||docId2=RPD999||docKey1=||docKey2=||selectorId=43||#632

| Completed | Activated | Inactive |

ECO Create — Item Configuration

Planning

CMDM

Setup Item Planning and Inventory — Get Item Planning Information — Invalid Buyer — Item Creation - Supplier Information

ECO Final Approval — Item Replacement Setup

Traditional Application

- Financials
- Master Data
  - Items/Sites
    - Site/Location/Status Menu
      - Inventory Status Code Maint
      - Inventory Status Code Browse
      - Inventory Status Code Report
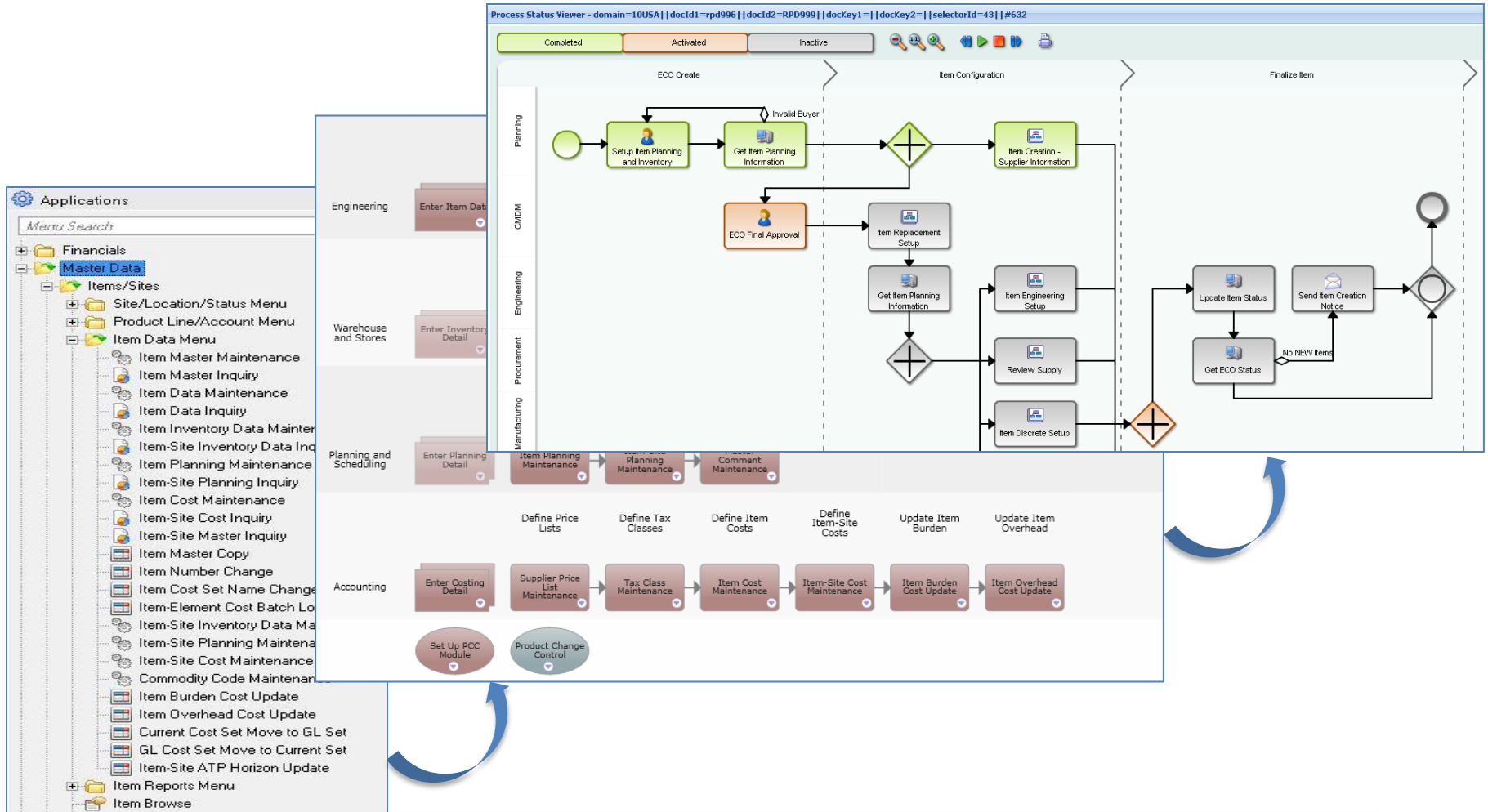   - Item Status Code Maintenance
      - Item Status Code Browse

- Visualize your processes
- Control & automate
- Collect metrics
- Improve process agility
- Facilitate optimization
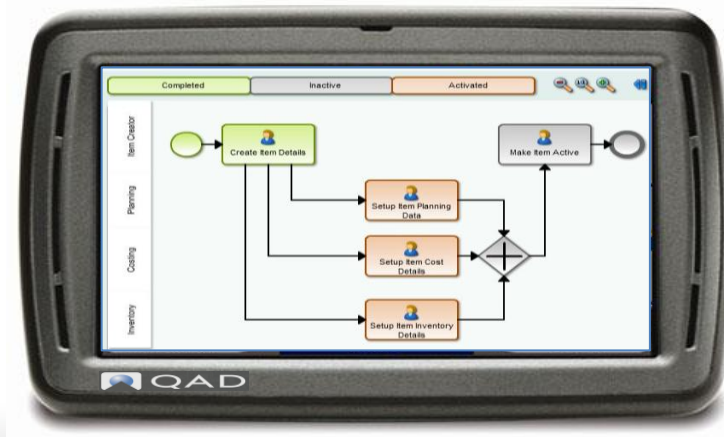
Select Menus to Explicit Processes

Benefits Overview

- Visibility
  - Model, Document & Monitor processes
- Control
  - Manage tasks and responsibility
- Measurement
  - Drive continuous improvement

The Decision

- QAD **MUST HAVE** BPM Capabilities
  - Maintain Competitive Advantage
  - Meet Customer Needs
  - Fulfil Industry Requirements

- R&D Make it Happen !!!!!

Menus to Processes

The QAD Approach

Development Plan

Decision (2011): Leverage OpenEdge BPM

Option 1: Revolution

- Greenfield
- Re-Write/Architect
- Start From Scratch
- Everything is a Process !!

Option 2: Evolution

- Build on Solid Foundations
- Focus on Value
- Work with Existing
- Re-Use if Possible

Development Philosophy

- Goals
  - Absolutely **No Application** Code Changes
  - Focus on User Experience
  - Streamline Process Implementation
  - Backward Compatible
  - Focus on Process Automation

Development Philosophy

- Goals

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 - Focus on Process Automation

No Application Code Changes

- Problems
  - Launching a Process
  - Access to Task Driven Screens
  - Application Actions not Linked
  - Manual Task Completion Required
- Benefits
  - Backward Compatibility
  - Users Guided through Process Execution
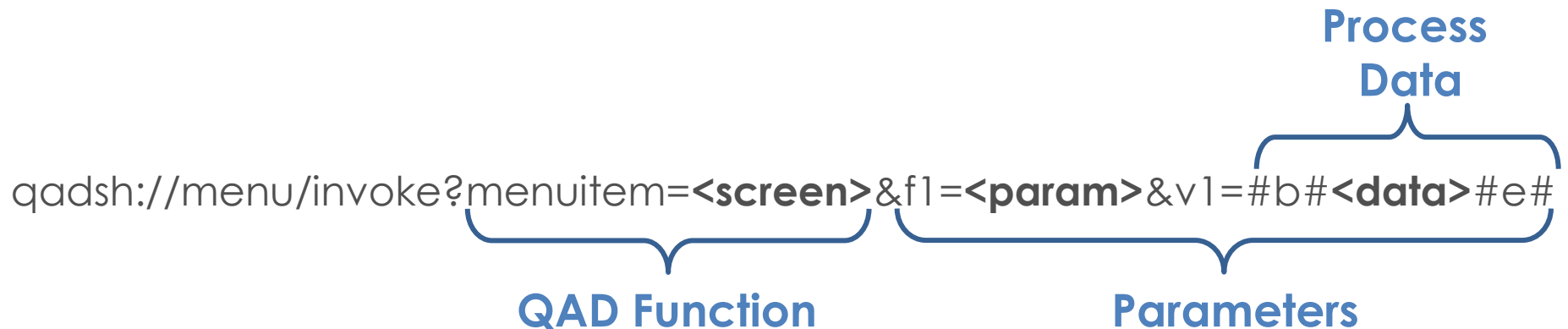 - Process Visibility
  - Easy to Implement

No Application Code Changes

- Problems

  - **Launching a Process**

  - **Access to Task Driven Screens**

  - Application Actions not Linked

  - Manual Task Completion Required

- Benefits

  - Backward Compatibility

  - Users Guided through Process Execution

  - Process Visibility

  - Easy to Implement
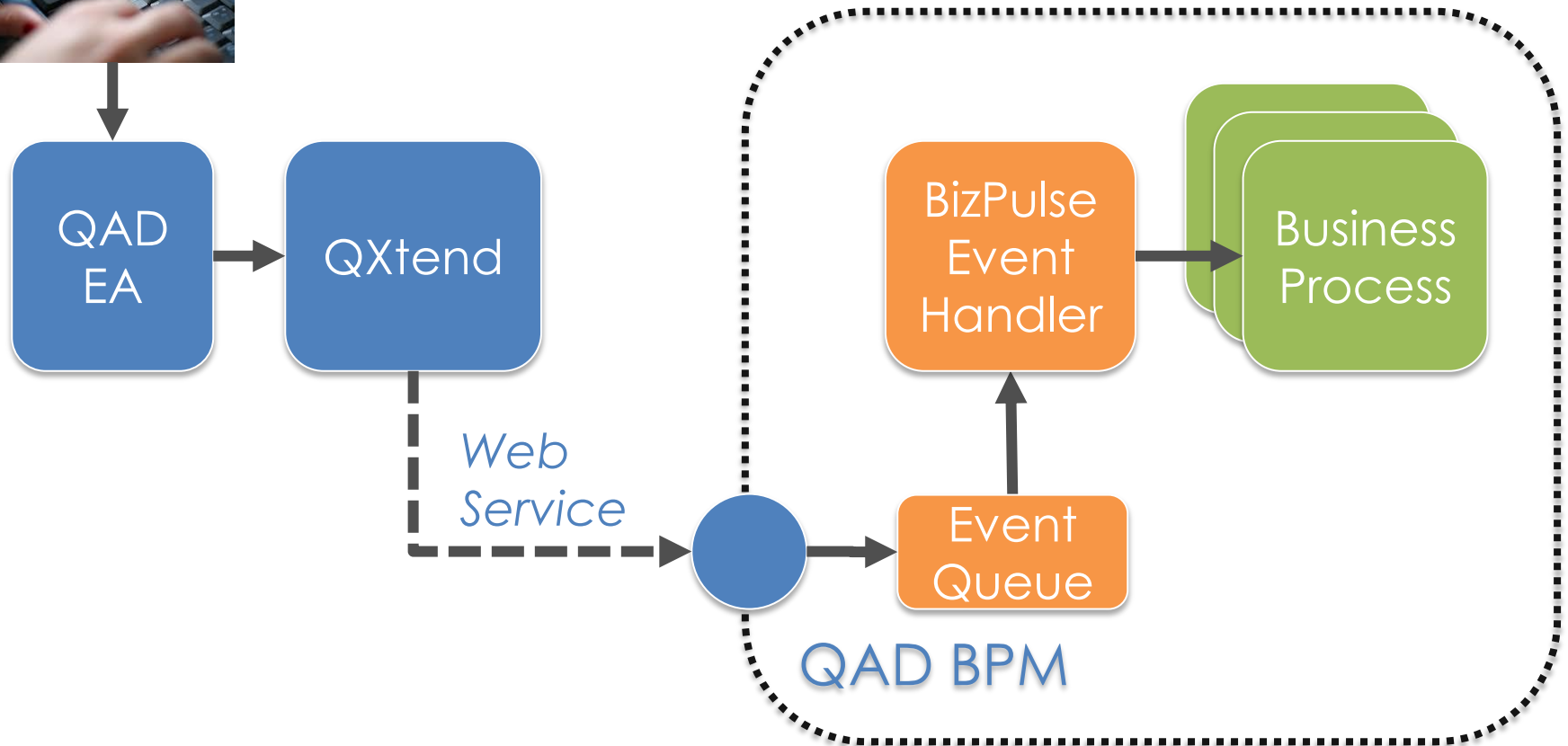
Access to Task Driven Screens

- Cannot create new screens
- Leverage existing capabilities
  - Dynamic Role/User based screen customization
  - QADSH – Proprietary URL access protocol
- Human process tasks use QADSH

Process Data

qadsh://menu/invoke?menuitem=**<screen>**&f1=**<param>**&v1=#b#**<data>**#e#

QAD Function   **Parameters**

Development Philosophy

- Goals
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Focus On User Experience

- QAD look & feel

- Share Users & Roles with QAD ERP

- Integrate Existing BPM Screens

- Use QAD Browse Infrastructure
  - Support Paging & Filtering
  - Drill to task screen

- Searchable Business Data
  - Primary business keys
  - Grouping categories

BPM Portal/API Issues

- Task APIs
  - No Paging
  - Limited Filtering
  - Only retrieve one task type at a time
- Tasks UI
  - Only view one task type at a time
  - Cannot replace runtime data in QADSH url
  - No Easy Business Key Filtering
- Instances UI
  - No Hierarchical View
  - No Easy Business Key Filtering
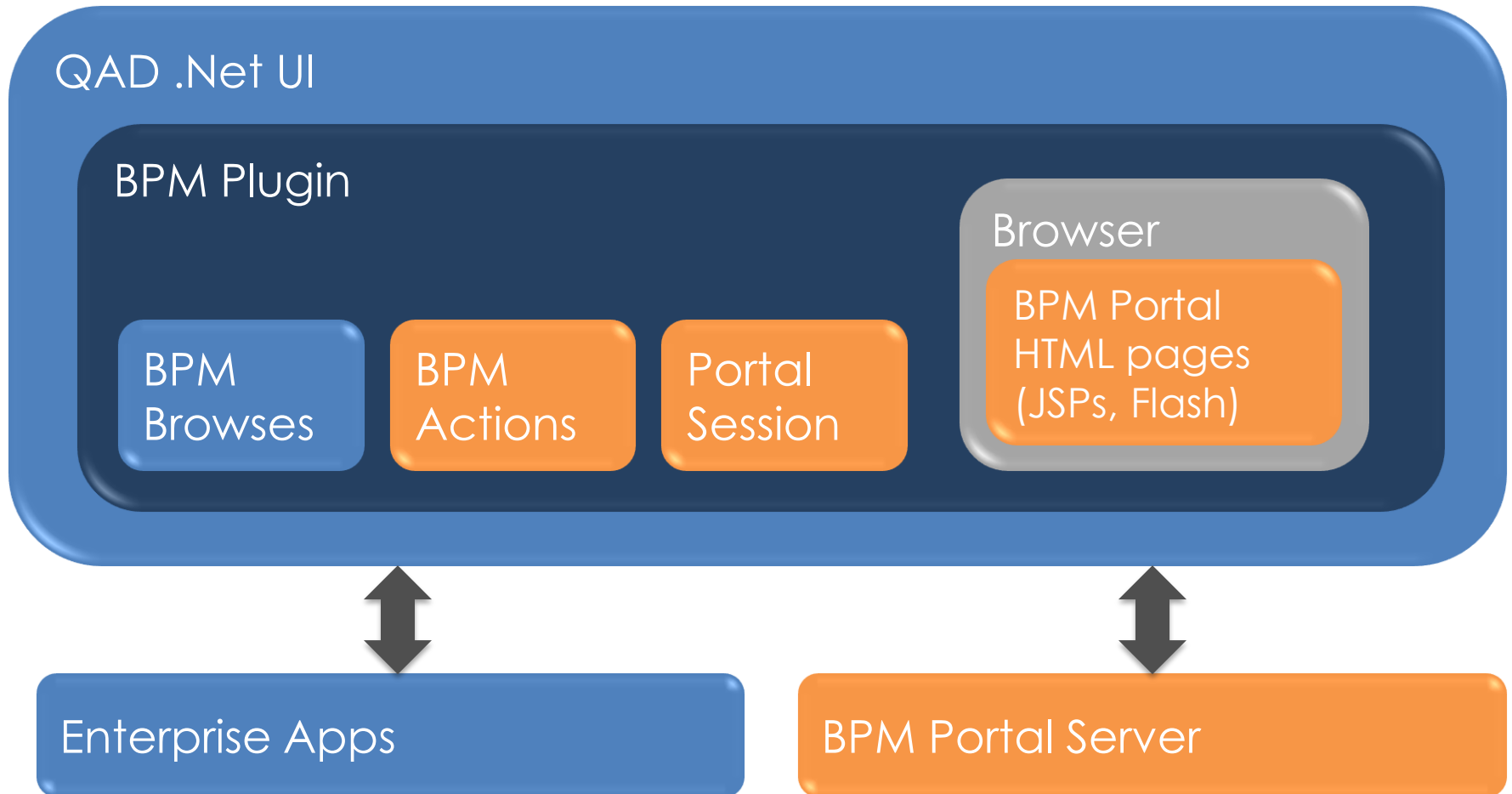
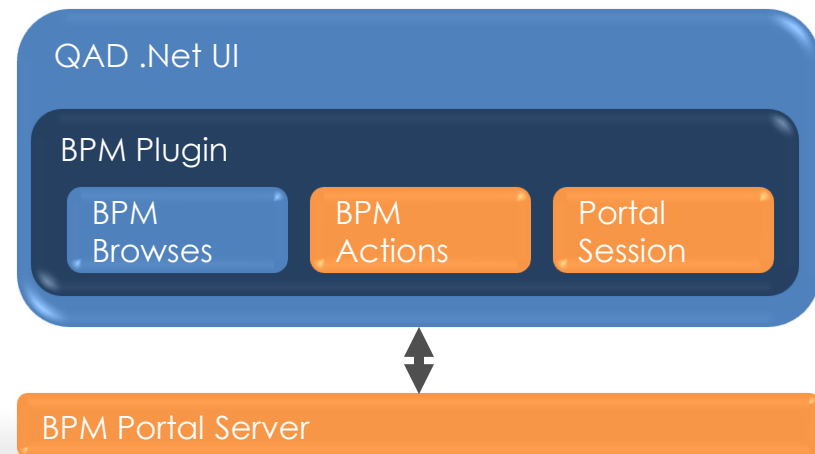# QAD BPM Web Services

- **QadBpmService**
  - MakeAvailable
  - CreateProcessComment
  - GetProcessCommentList
  - GetTranslatedApplication List
  - ValidateBpmProfile

- **QadBpmHandlerService**
  - PostQadBusinessEvent

- **QadBpmBrowseService**
  - GetWorkList
  - GetAllTasks
  - GetProcessInstanceList
  - GetAllProcesses
  - GetStaticFilterCount
  - GetStaticFilterMetaData

QAD .Net UI

BPM Plugin

| BPM Browses | BPM Actions | Portal Session |

BPM Portal Server

QAD

Development Philosophy

- Goals
  - Absolutely No Application Code Changes
  - Focus on User Experience
  - **Streamline Process Implementation**
  - **Backward Compatible**
  - **Focus on Process Automation**

Demonstration

QAD

Menus to Processes

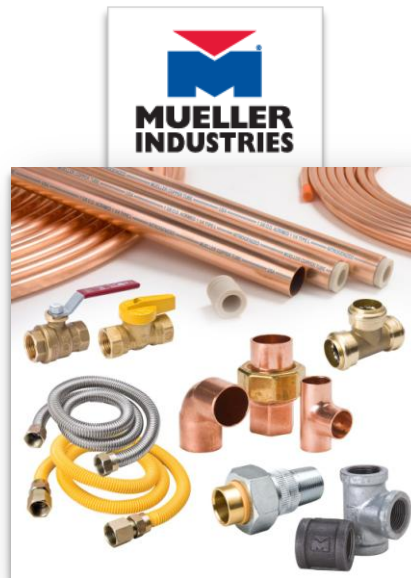# Current Status

QAD

QAD BPM Early Adopter

- Early adopter phase
  - April 2012 – March 2013
  - 5 US Customers
  - Restricted to QAD standard processes
- Focus on visualization & control

Early Customers

What the Early Customers are Saying

- Ralcorp Frozen Bakery Products

    - Process Owners know who's "Got the ball"

    - Helps keep people on-task

    - Help us improve speed-to-market

- MUELLER INDUSTRIES

    - Helps engage all level of users in the process

    - Improves process visibility

    - Lean concepts applied to back office processes

- IMRIS

    - Reduce Item/Supplier setup time

    - Improve data quality

    - Improve transparency between functional groups

Rolling Out

- Great interest from customers
- Good implementation funnel

- Challenges
  - Field knowledge
  - New skills required
  - Java required
  - BPM is small part of QAD

- QAD BPM Services Practice
  - Centre of excellence for BPM at QAD

Future Plans

QAD

Development Roadmap

- Upgrade BPM Engine
  - OpenEdge 11.3
  - Corticon (Rules are important)
- Process Analytics
- Mobile BPM
- More Standard Templates
- Tighter Integration
  - Code for BPM
  - Replace Web Services with ABL

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