



QAD Enterprise Platform:

KPIs & Action Centers

Course Outline

- Creating KPIs
- Create an Action Center
- Add KPIs to Action Center

Build a KPI

QAD QAD Admin Activity Approvals System Configuration Control Settings Development More

KPIs <No Stored View> + New Edit Actions More

KPI starts with Search

KPI	Data Source Type	Data Source Label	Data Source	Active	KPI Type
Action Messages Mf...	Browse	Action Messages	urn:browse:mfg:om097		Current Data
Active RSS Details	Browse	Customer Req Ship Schedul...	urn:browse:mfg:rc025		Current Data
Active RSS Due Today	Browse	Customer Req Ship Schedul...	urn:browse:mfg:rc025		Current Data
Aging Work Order B...	Browse	Maintenance Order	urn:browse:mfg:ea023		Current Data
All Action Requests	Browse	Action Requests	urn:browse:mfg:fs154		Current Data
All Depot Order Lines	Browse	Depot Order Detail	urn:browse:mfg:fs098		Current Data
All Depot Orders	Browse	Depot Orders	urn:browse:mfg:fs176		Current Data
All Service Order Lines	Browse	All Service Orders	urn:browse:mfg:fs098		Current Data

Menu Search

Recent

- KPIs
- Configuration Data
- Development Projects
- TrainingRoom
- Training
- Business Components
- EmployeeLoan
- Approval Routes

Select KPIs from the menu.

Build a KPI

KPIs | <No Stored View> ▾ + New ✎ Edit Actions ▾ More ▾ ↗

KPI starts with ▾ Search

KPI ▾	Data Source Type ▾	Data Source Label ▾	Data Source ▾	Active ▾	KPI Type ▾	Auto Refresh ▾
Action Messages Mf...	Browse	Action Messages	urn:browse:mfg:om097	☐	Current Data	No
Active RSS Details	Browse	Customer Req Ship Schedul...	urn:browse:mfg:rc025	☐	Current Data	No
Active RSS Due Today	Browse	Customer Req Ship Schedul...	urn:browse:mfg:rc025	☒	Current Data	No
Aging Work Order B...	Browse	Maintenance Order	urn:browse:mfg:ea023	☐	Current Data	No
All Action Requests	Browse	Action Requests	urn:browse:mfg:fs154	☒	Current Data	No
All Depot Order Lines	Browse	Depot Order Detail	urn:browse:mfg:fs098	☒	Current Data	No
All Depot Orders	Browse	Depot Orders	urn:browse:mfg:fs176	☒	Current Data	No
All Service Order Lines	Browse	All Service Orders	urn:browse:mfg:fs089	☒	Current Data	No

Adaptive UX provides a rich collection of prebuilt KPIs.

Click “New” to build a new KPI for our Business Component.

Build a KPI

Main | Browse | Domains & Entities | Fields | Refresh Options | Visuals | Additional Details | ⚙️

▼ Main

KPI

Data Source Type

Data Source

Data Source Label

Active ☒

KPI Type

Filter by Current Workspace ☒

Saved To

Visual Type

Select

1. Enter the KPI Name.

2. AKPIs become Configuration Data.

3. Click the "Select" button. For Data Source.

Build a KPI

KPIs > Select Browse Data Source

Data Source

Factory View

More

Eligible for Menu = "Yes" ✕

URI contains "Training" ✕

URI	Description	Eligible for Menu
urn:browser:bebrows...	AddressBook-User_1	Yes
urn:browser:bebrows...	CountriesEX-User_1	Yes
urn:browser:bebrows...	EmployeeLoan-User...	Yes
urn:browser:bebrows...	TrainingRoom-User_1	Yes
urn:browser:bebrows...	Training-User_1	Yes

1. Select Data Source with description

2. Then, click OK.

Build a KPI

Now Click the
Configure Button
for the Browse

Main Browse Domains & Entities Fields Refresh Options Visuals Additions

▼ Main

KPI Training Results User_1

Data Source Type Browse ▼

Data Source urn:browse:bebrowse:com.extensions.training... **Select**

Data Source Label Training-User_1

Active ☒

KPI Type Current Data ▼

▼ Browse

Configure Configure browse columns and search criteria.

Criteria Configure to see criteria and lines returned.

Lines Returned

Build a KPI

KPIs > Configure Browse Data Source

Training | <No Stored View> + New Edit More

Class Name starts with

Search

Class Name▲1	Location▲2	Capacity	Topic Type	Start Date	Area of Study	Duration Days
Laser Cutter Mainten...	Chicago	8	Maintenance	8/21/2022 12:00 AM	Manufacturing	4
Purchasing	Chicago					
Sales Order	Santa Barbara					
Stamping Machine M...	Detroit	3	Maintenance	8/21/2022 12:00 AM	Manufacturing	3

Configure the Browse; just accept the default and click OK.

Build a KPI

Active Fields Max 20

More ▾

✓ Active	Field Label	Data Type	Case	Field Format	Field
✓	Class Name	Text	No Conversion		training.className
✓	Location	Text	No Conversion		training.location
✓	Capacity	Number			training.capacity
✓	Topic Type	Text	No Conversion		training.topicType
✓	Start Date	Date			training.startDate
✓	Area of Study	Text	No Conversion		training.areaOfSt...
✓	Duration Days	Number			training.duration...

50 ▾ Records per Page

Be sure to check
"Allow Manual
Refresh"

Click Save

If you receive an error
related to auto-
refresh, uncheck the
Auto-Refresh
checkbox and click
Save again.

Refresh Options

Auto Refresh ☒Refresh Rate Allow Manual Refresh ☒

Build a KPI

More ▾

☒ Active	Field Label	Data Type	Case
☒	Class Name	Text	No Conversion
☒	Location	Text	No Conversion
☒	Capacity	Number	
☒	Topic Type	Text	No Conversion
☒	Start Date	Date	
☒	Area of Study	Text	No Conversion
☒	Duration Days	Number	

« < > » 50 ▾ Records per Page

▼ Refresh Options

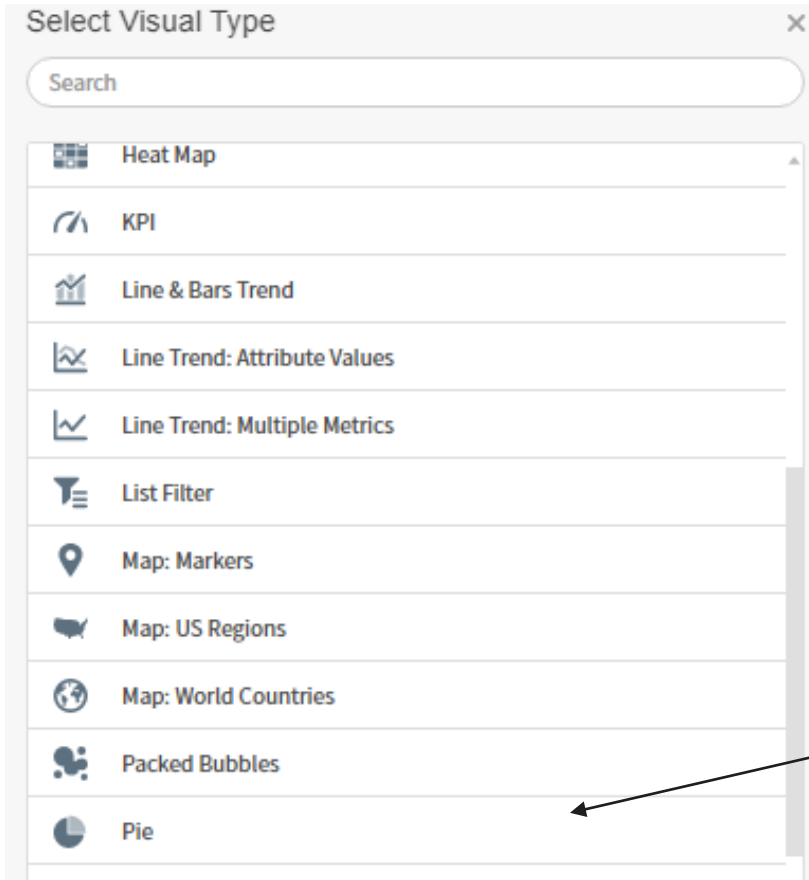
Auto Refresh ☒Refresh Rate Daily ▾Allow Manual Refresh ☒

▼ Visuals

+ New ← Edit Delete Details More ▾

After Saving;
Scroll to Visuals
and click New.

Build a KPI



First choose a Visualization.

Scroll down the list and select "Pie".

Build a KPI

KPIs > Visuals

Training Results User_1

[Null] | 89.844 (33.8%)

Group

Search

All ABC 123

Attribute

- ☒ Area of Study
- ☐ Class Name
- ☐ Location
- ☐ Topic Type

Number

- ☐ Average Score
- ☐ Capacity
- ☐ Class Value
- ☐ Duration Days
- ☐ Student Count

Time

- ☐ Start Date

Group: Area of Study Size: Average Score (Sum)

Manufacturing | 176.000 (56.2%)

AREA OF STUDY

- Distribution
- Manufacturing
- [Null]

Training Results User_1

Sort & Limit

Area of Study

Sort by: Area of Study

Aggregation: No Aggregation

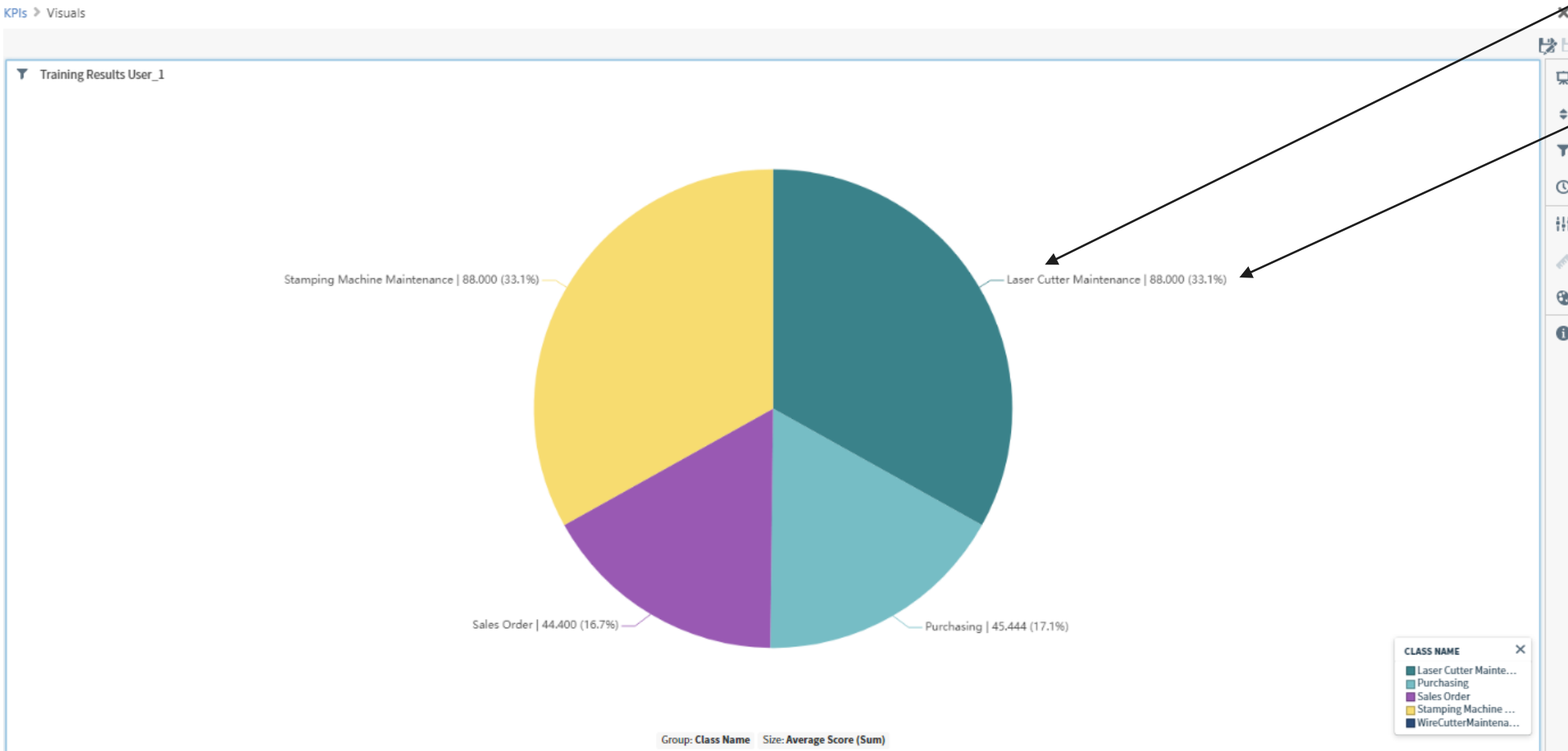
Order: Alphabetical (A - Z)

Limit: 20

Cancel Apply

Click on Group and change Area of Study to Class Name

Build a KPI

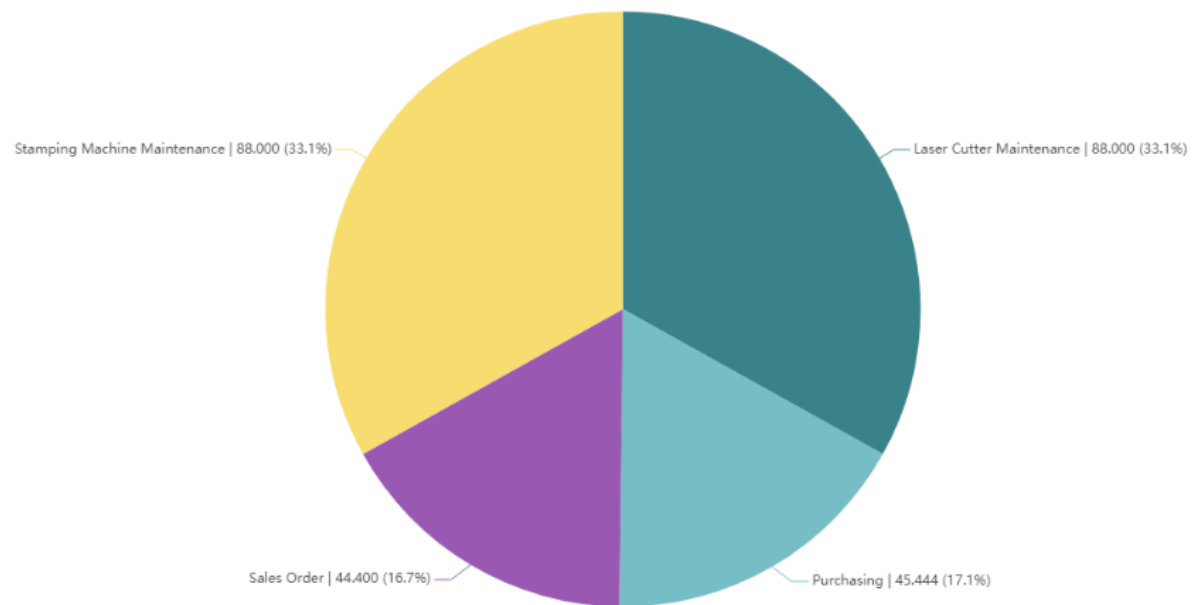


The display will immediately change to show the Class Name as the label, and the Average Score as the value.

Build a KPI

KPIs > Visuals

Training Results User_1

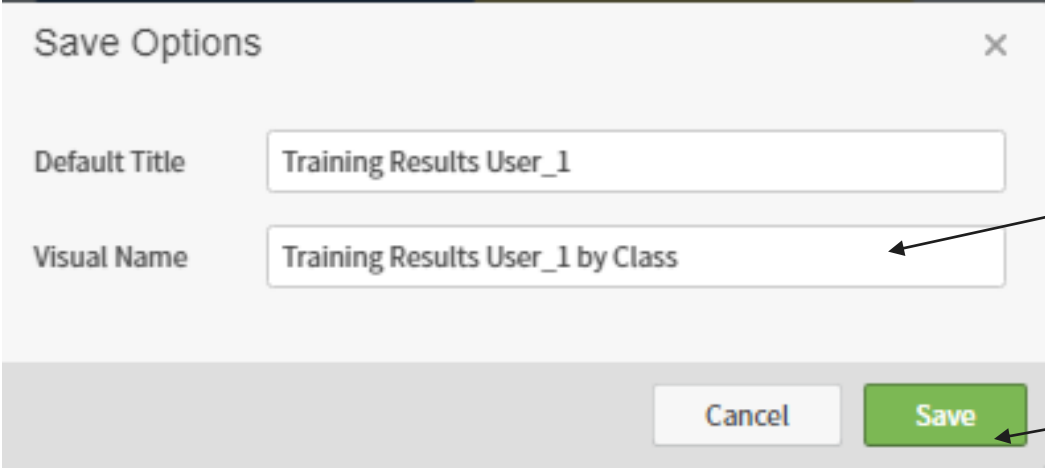


Group: Class Name Size: Average Score (Sum)

CLASS NAME	
Laser Cutter Maintenance	
Purchasing	
Sales Order	
Stamping Machine Maintenance	
WireCutterMaintenance	

Now click the Disk Icon to save the Visual.

Build a KPI

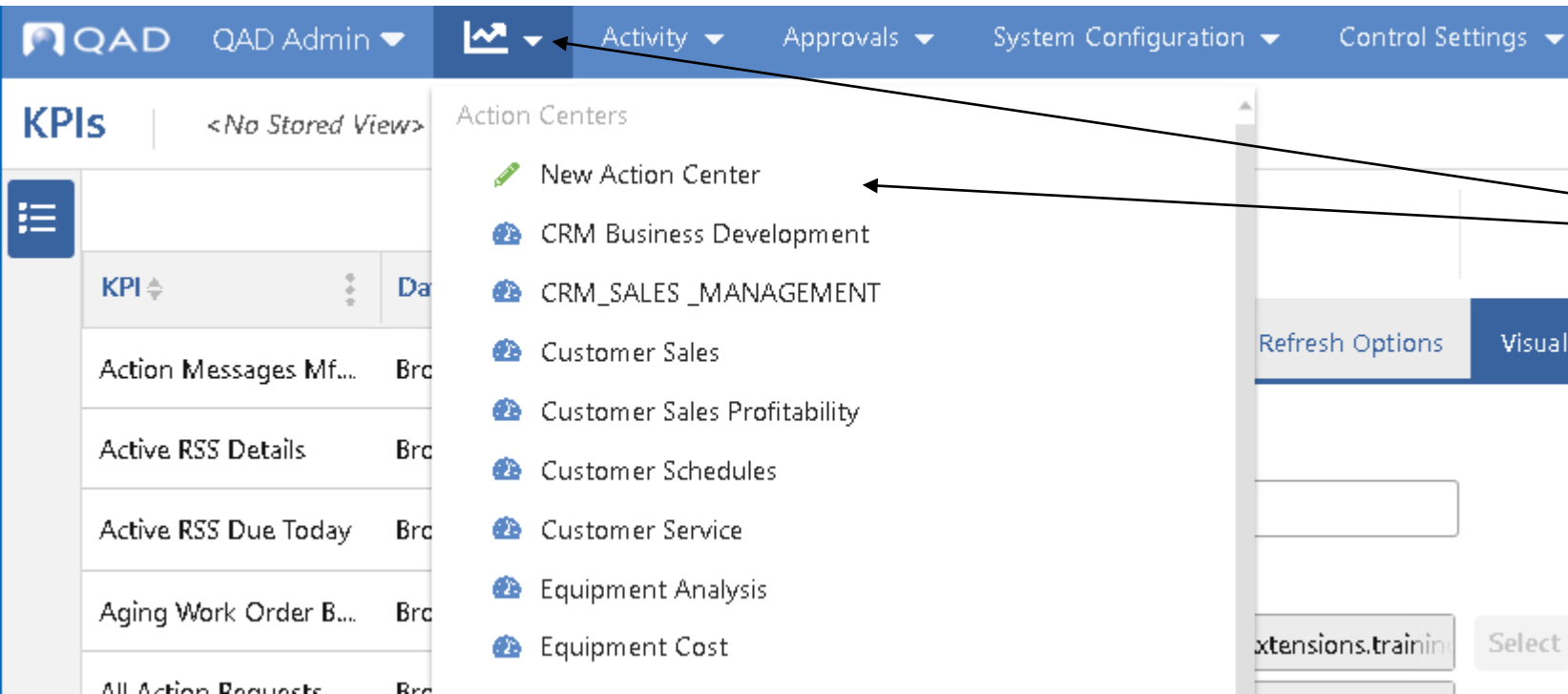


A screenshot of a 'Save Options' dialog box. The dialog has a title bar with 'Save Options' and a close button (X). It contains two text input fields: 'Default Title' with the value 'Training Results User_1' and 'Visual Name' with the value 'Training Results User_1 by Class'. At the bottom right, there are two buttons: 'Cancel' and 'Save' (which is highlighted in green). Two arrows point from a text box on the right to the 'Visual Name' field and the 'Save' button.

Enter the Visual Name as shown.

Then Click the Save Button.

Build an Action Center



Now from the Action Center Icon of the menu bar
Add your own Action Center!

Choose:
"New Action Center"

Build an Action Center

New Action Center



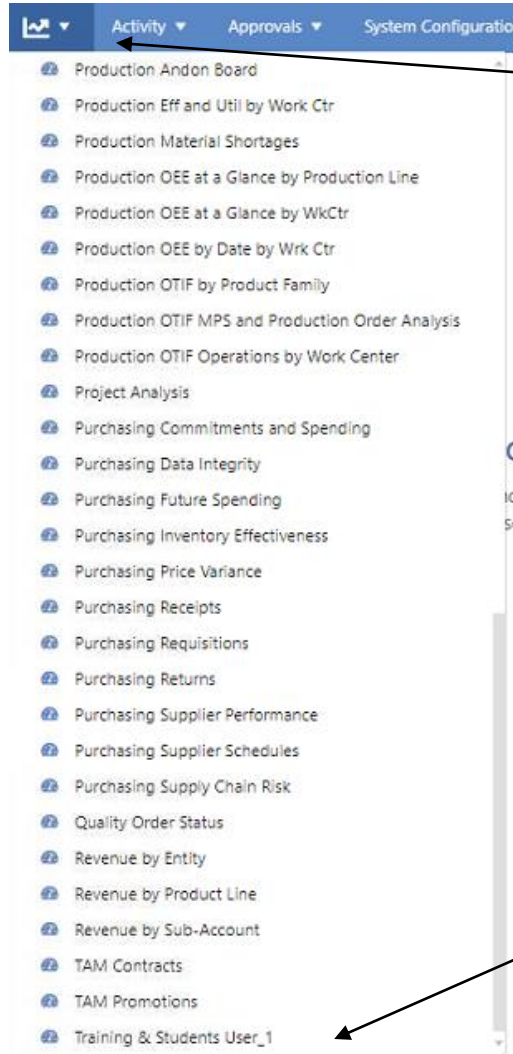
Name Training & Students User_1

Continue

Close

Name Your Action Center!
Training & Students User_1

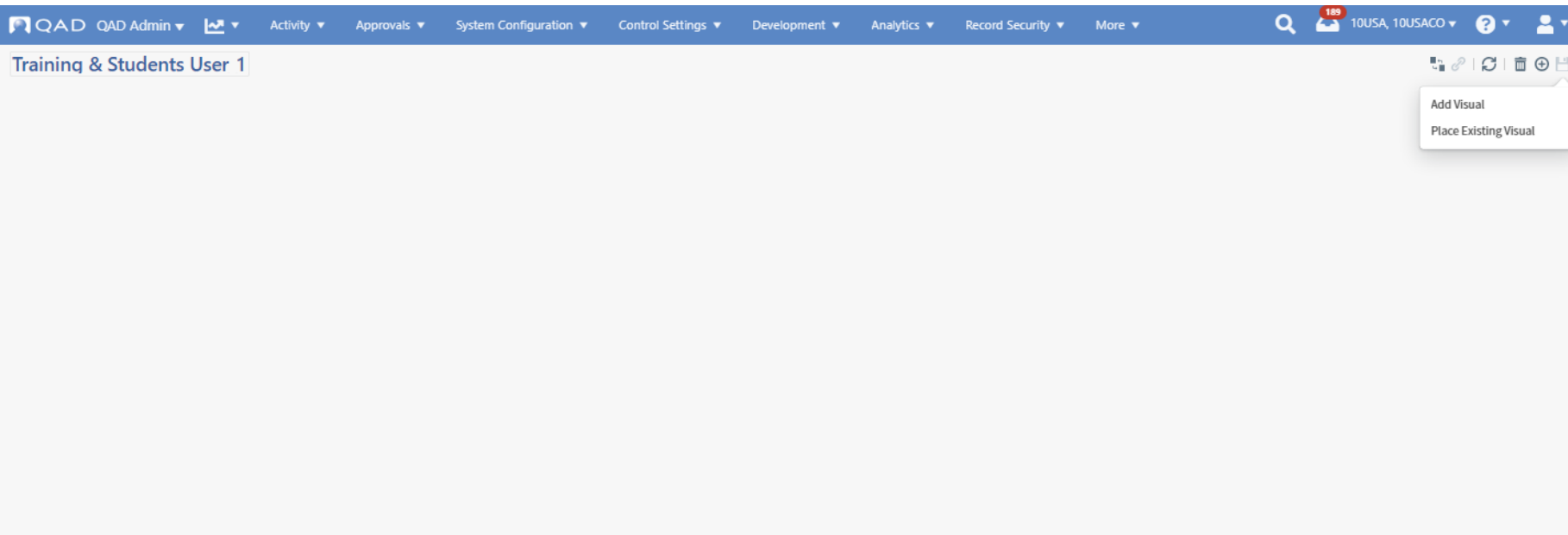
Build an Action Center



Click the Bar Chart Icon, and choose:

Training & Students User_1
(you may need to scroll a bit and substitute your UserID)

Build an Action Center



Choose Add Visual on the menu on the right. Click the plus icon if you do not see the menu choices.

Build an Action Center

Step 1 of 2: Select a Source ×

All Connection Types ⌵

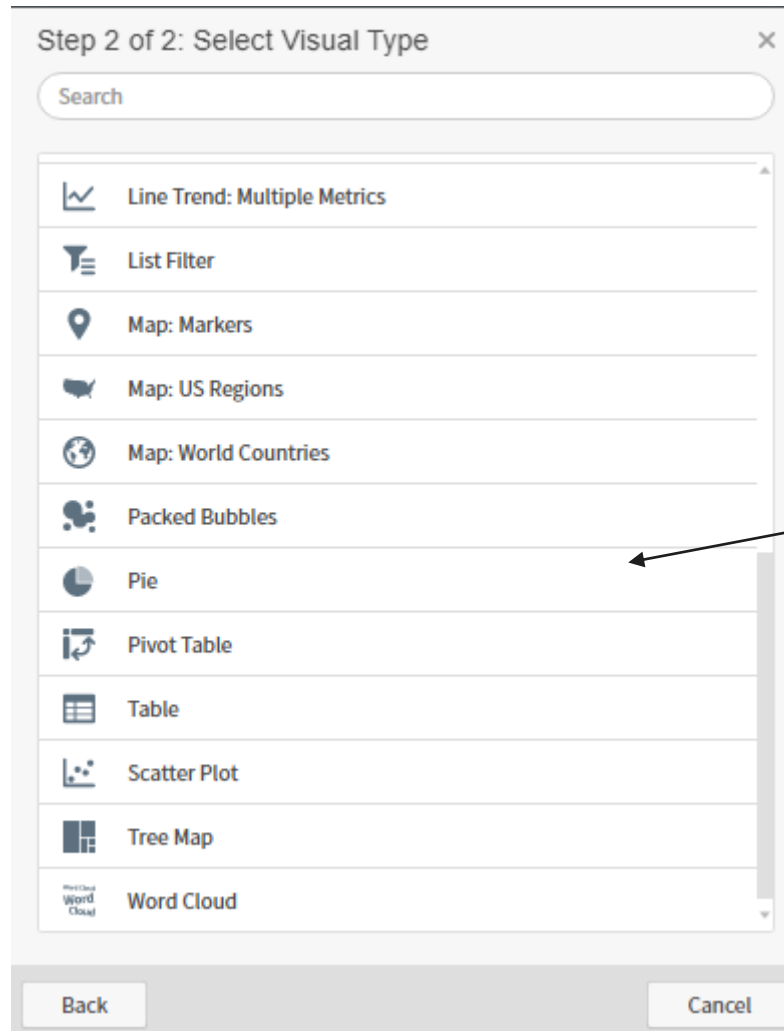
	Training Results User_1	admin
	Training-User_1	admin

Cancel

Enter train in the search field to find the Training Results User_1 Visual.

Click On Training Results User_1 visual

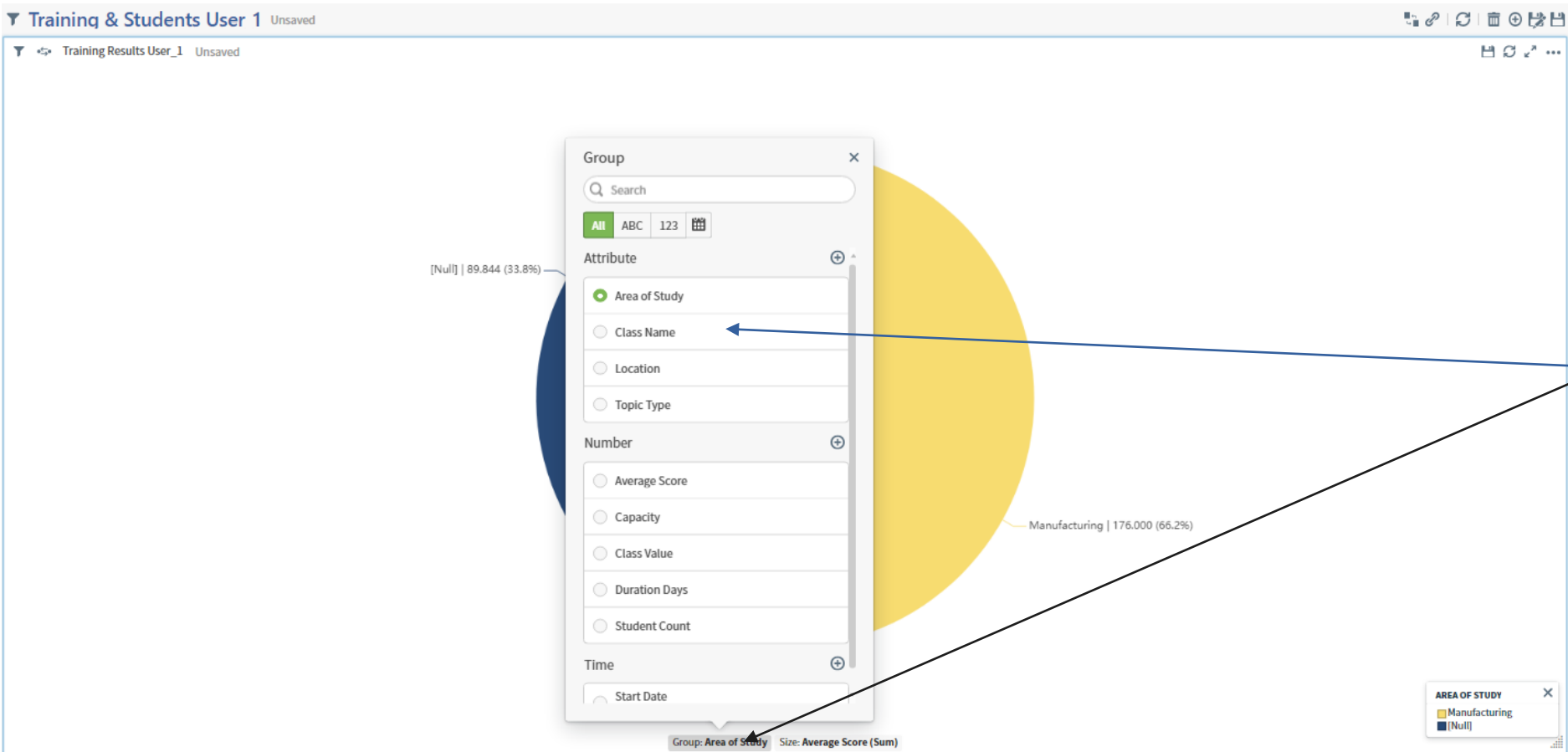
Build an Action Center



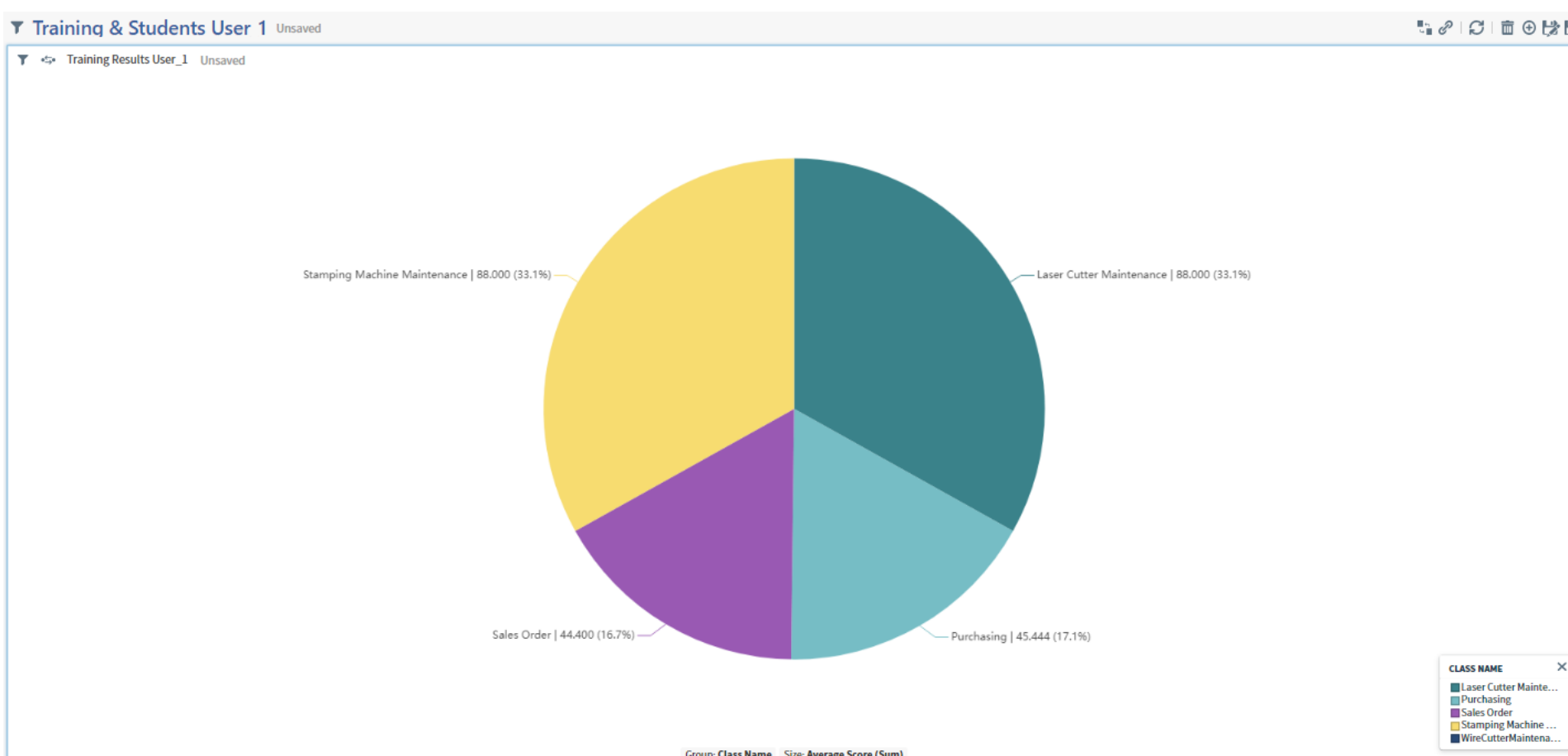
Choose Pie from the
"Select Visualization
Type" Modal

Build an Action Center

Again click on Group
and change Area of
Study to Class Name



Build an Action Center



Now click the save (Disk Icon) to save the Action Center.

Build an Action Center

Save Options

Name * Training & Students User_1

Description 750 characters maximum

New Visuals

⚠ The following new visuals will be saved on this action center.

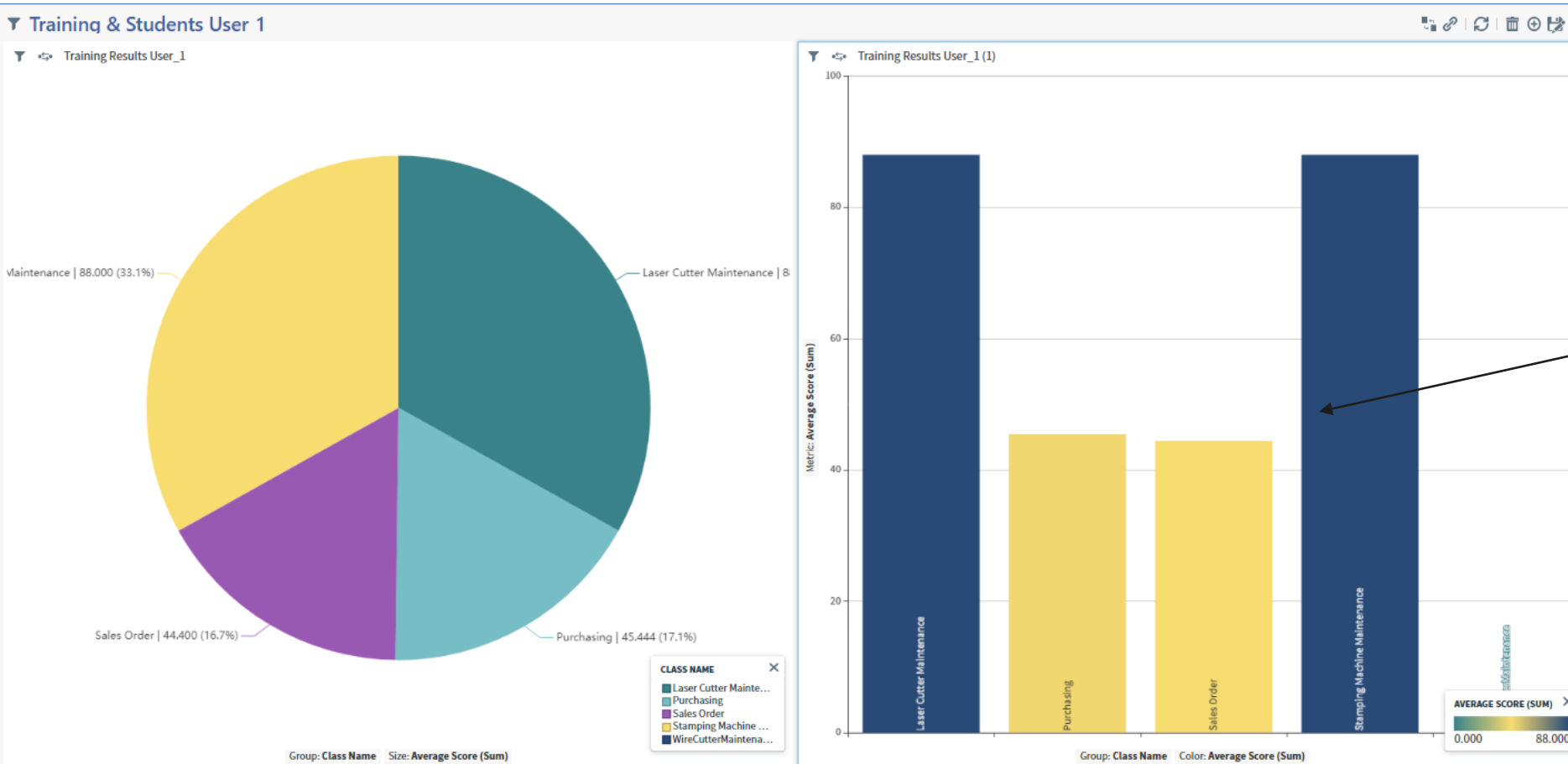
📊 Title: Training Results User_1

Cancel Save

Confirm the Action Center Name, and the addition of the Training Results User_1 KPI to the Action Center.

Click Save.

Build an Action Center



You can create multiple Visualizations from the same KPI, and add Visualizations from other KPIs. Arrange them for best usability in each case.