# QAD Channel Islands: The Future of your Effective Enterprise

Mary Ann Guthrie, Senior Director, R&D Markus Barone, Product Owner / Architect, R&D September 2016









### Safe Harbor Statement

The following is intended to outline QAD's general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, functional capabilities, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functional capabilities described for QAD's products remains at the sole discretion of QAD.



# The Future of Your Effective Enterprise

# Channel Islands provides:

- Access Anywhere
  - Web browser, No VPN
- Side by Side
  - Channel Islands UI and .NetUI
- Channel Islands Modules
  - Upgrade as needed



### Channel Islands and The Effective User





### Effective Enterprise needs Effective Users

- Excellent User Experience (UX)
  - Transaction Users
  - Managers
  - Executives

# How do we get there?



"Listening is a hugely powerful form of attention. It's presence.

And if you are really listening, you are genuinely curious and you are open to be surprised and changed by what comes back at you."

- Krista Tippett



### Customers Have Shaped Channel Islands











































**QAD Channel Islands** 

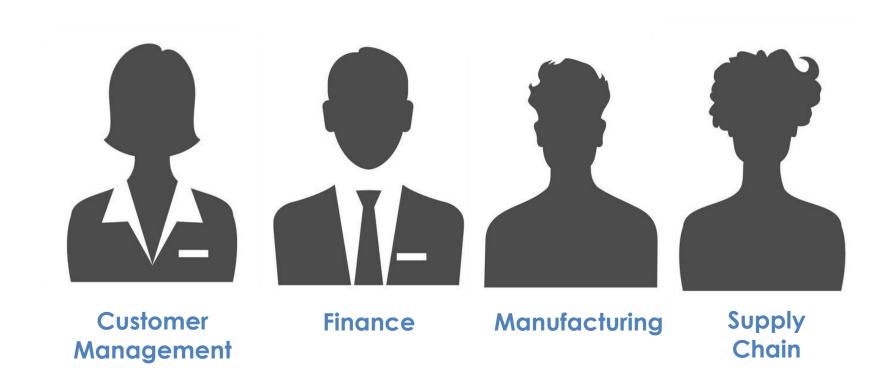
### Channel Islands – September 2016

Anacapa & Santa Cruz



### Channel Islands – September 2016

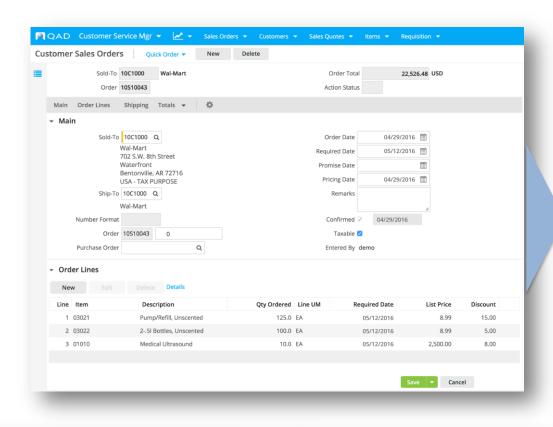
40 Focused Role-Based Menus

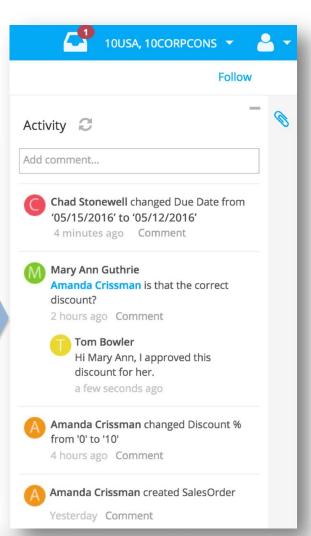




### Channel Islands – September 2016

Collaboration



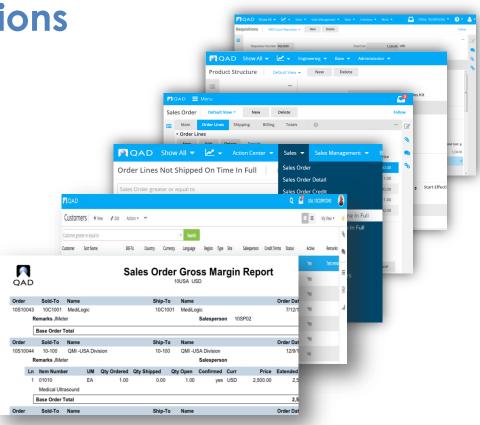




# Channel Islands – September 2016

Menu options, favorites, search catalog:

- ~40 Business Functions
- 1900 Browses
- 450 Reports





# Channel Islands – September 2016

Action Centers

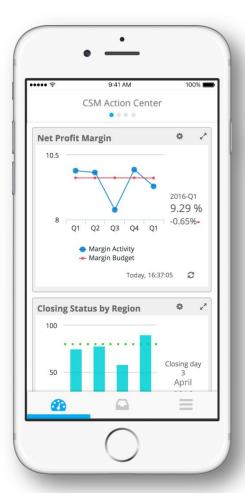


Customer Service Manager



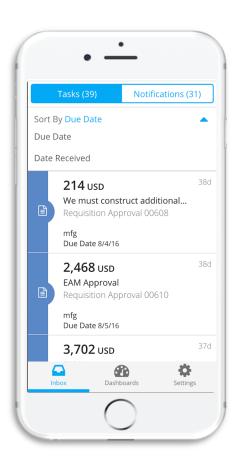
# Mobility

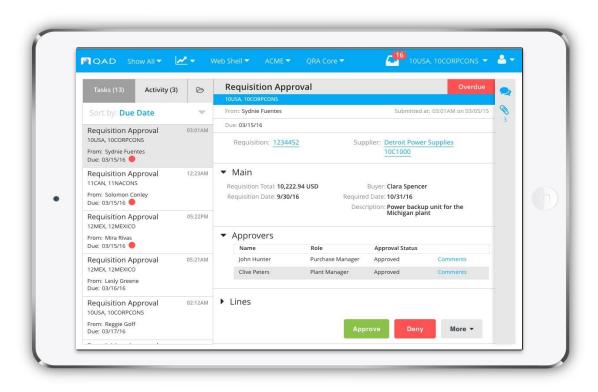






### **Approvals**

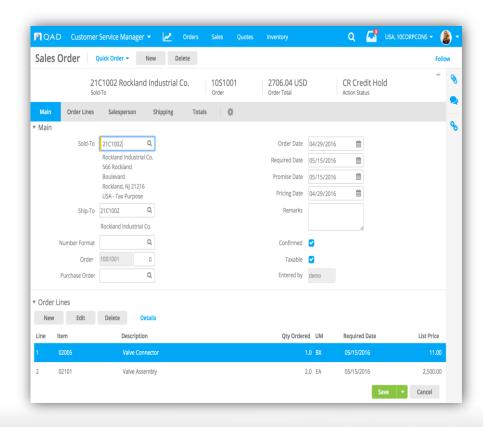






### **Agility for Knowledge Workers**

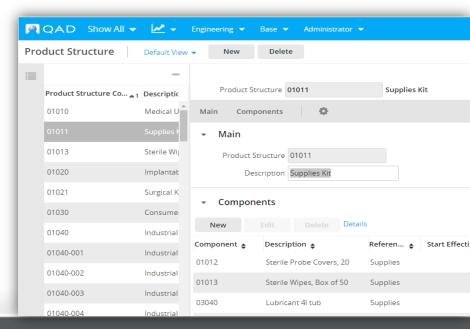
- Streamlined maintenance
  - Single form
  - Easy to navigate anywhere
  - Personalized views
- Reduce training time
  - Intuitive





### Channel Islands – September 2016

- Discrete Sales Quote and Sales Order
  - Quick quote to invoice
- Requisition to Purchase Order
  - Combine/simplify Direct and MRO (GRS & EAM)
- Product Structures
  - First phase for Discrete products





**QAD Channel Islands** 

### Anna – Customer Service Manager

A Day in the Life of an Effective Manager



# The Effective Manager – Mobility

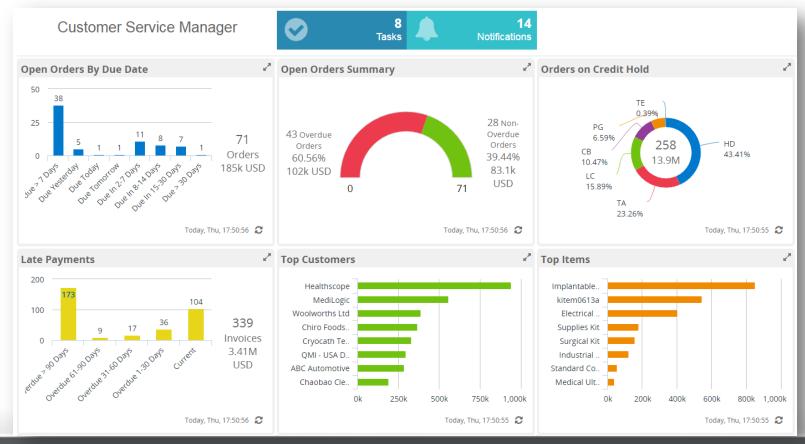
- Anna is the Customer Service Manager (CSM) for QMI, Inc...
- Anna checks QAD on her smartphone over breakfast:
  - Any approvals need her attention?
  - Does she have any urgent messages from her team or sales?
  - How do the KPIs look for Late Shipments or Sales Trends?





### The Effective Manager – Action Center

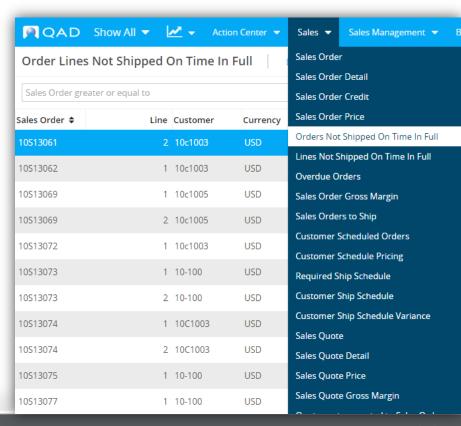
 Anna signs in at the office to check into open orders by due date in detail...





### The Effective Manager – Visibility

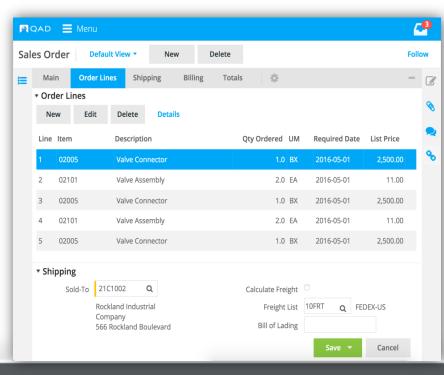
- Next she checks a browse...
- "Order Lines not shipped on time or in full"





### The Effective Manager – Transactions

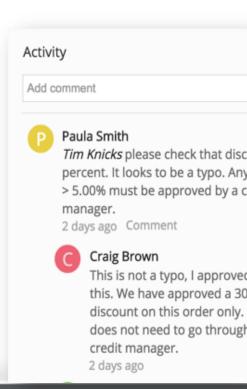
- Anna knows the phones get very busy around an hour before lunch...
  - Anna starts taking Quotes and Orders
  - She's asked a pricing question and explains volume disc levels
  - She can also select allocations and provide specific Lot numbers





### The Effective Manager – Responsiveness

- Anna receives some notifications...
  - Anna quickly approves a requisition for standing desk for one of her employees.
  - She also sees a message from Craig the Sales Manager informing her that he approved a large 30% disc for a new customer
  - She can link directly to the SO to review and add comments.





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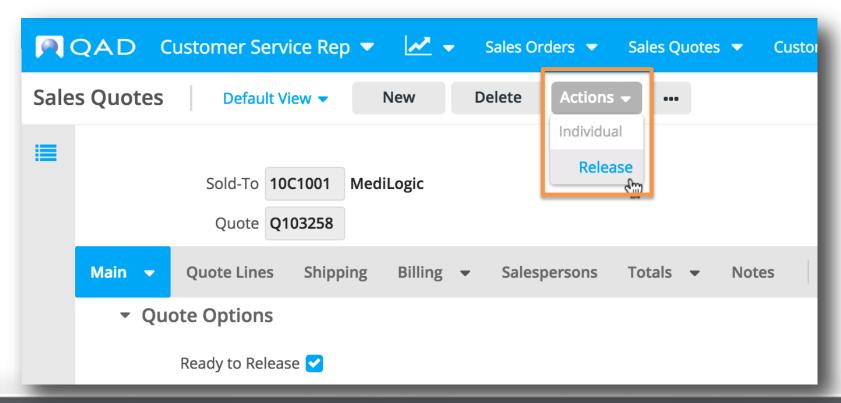
# Chris – Customer Service Representative

A Day in the Life of an Effective User



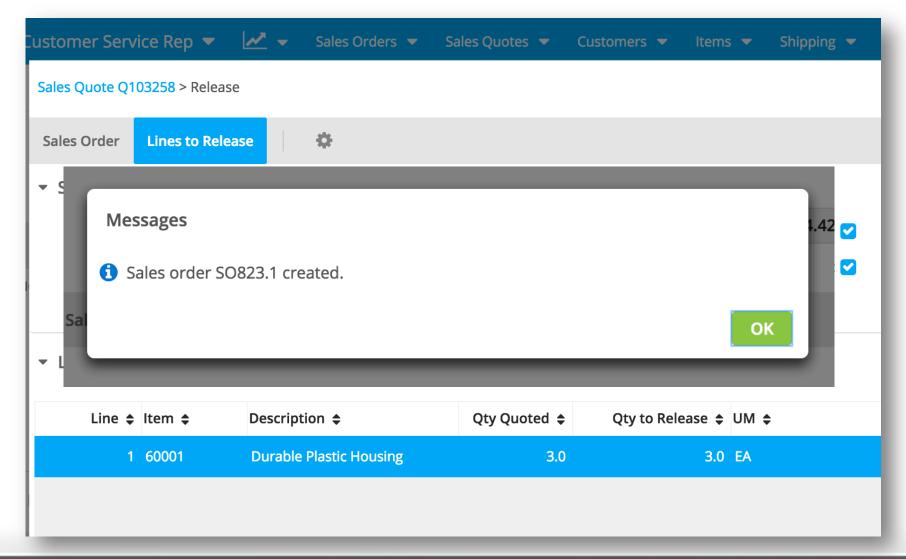
### Customer Service – Fast and Easy

 Chris the Customer Service Rep (CSR) for QMI, Inc, signs in and sees a notification to release, ship and invoice Quote #Q103258



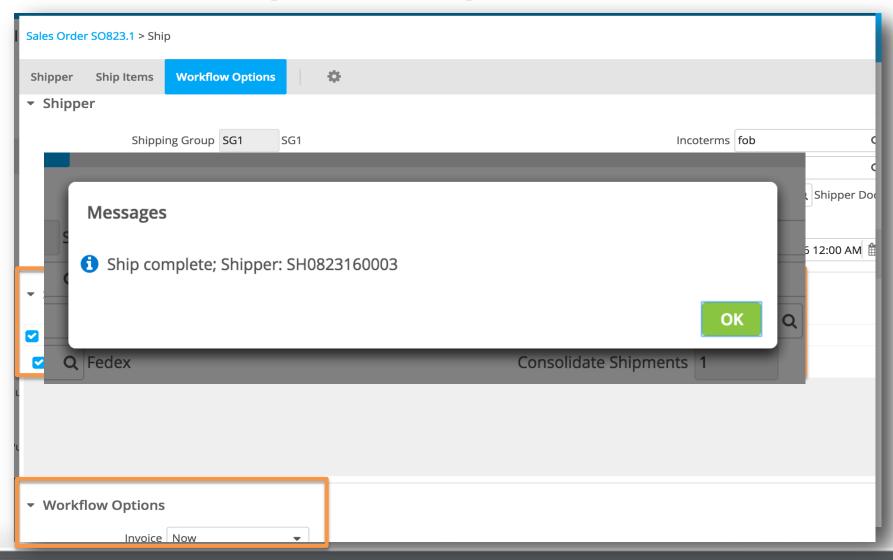


### Chris – Releases the Quote to Order



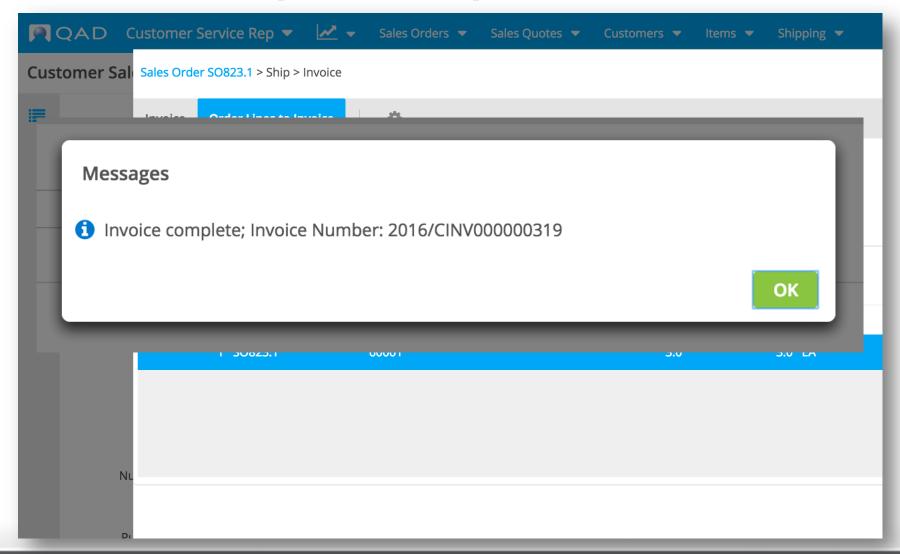


### Chris – Completes Ship and Invoice



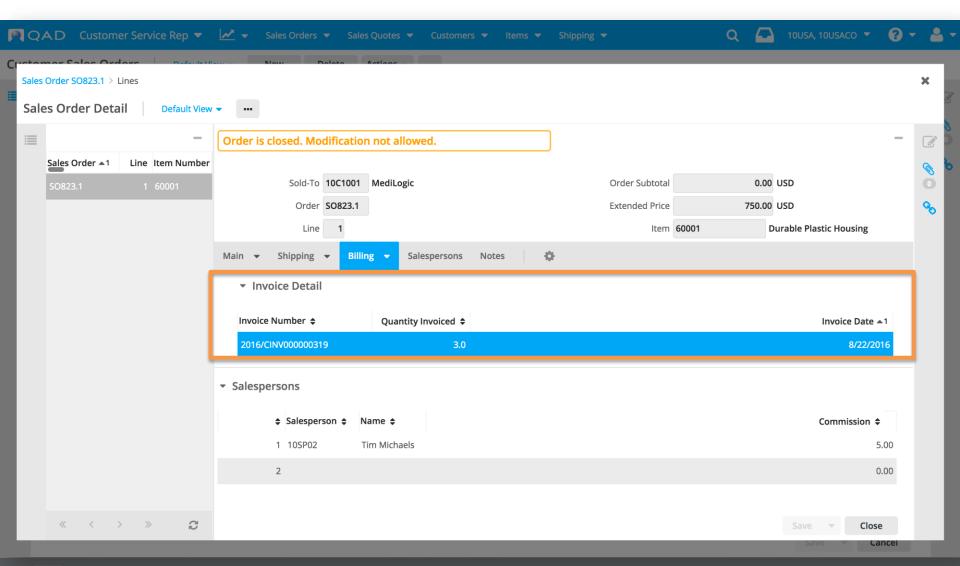


# Chris – Completes Ship and Invoice





### Chris - Review Results





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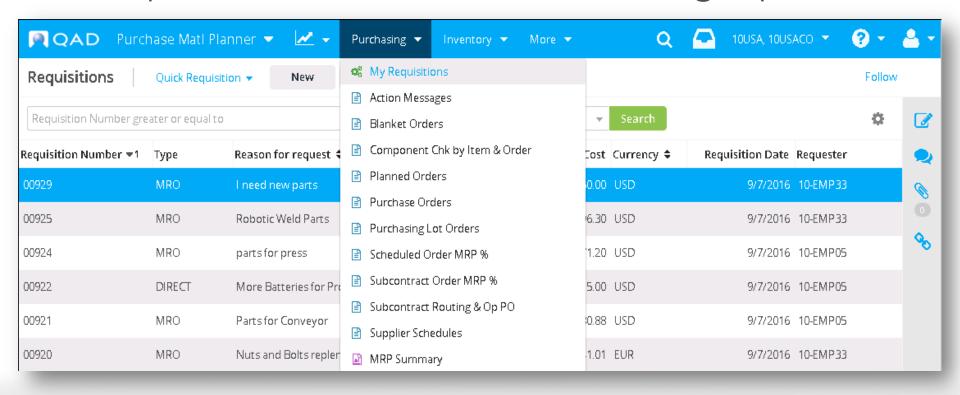
### Sarah – Purchase Material Planner

Day in the Life of an Effective User



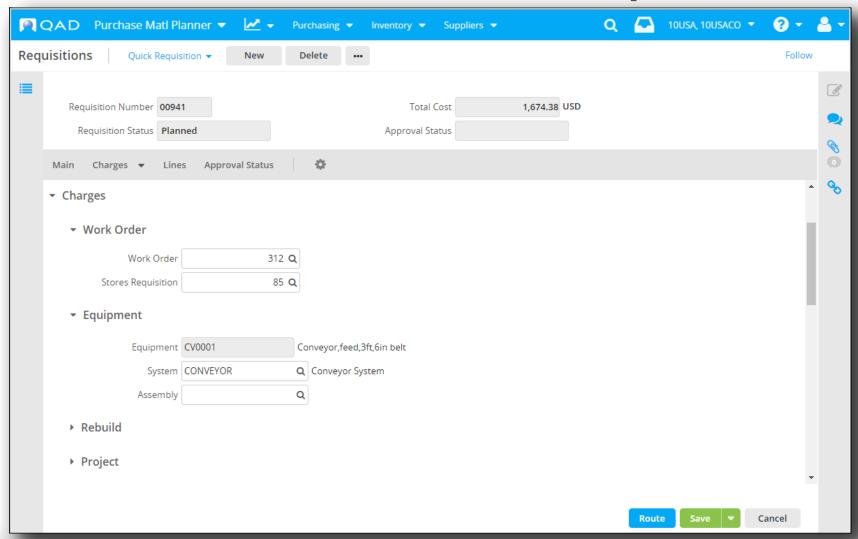
### Requisitions – Simplify & Streamline

 Sarah the Purchase Material Planner signs on to manage Direct and MRO purchase requisitions on the web from a single place



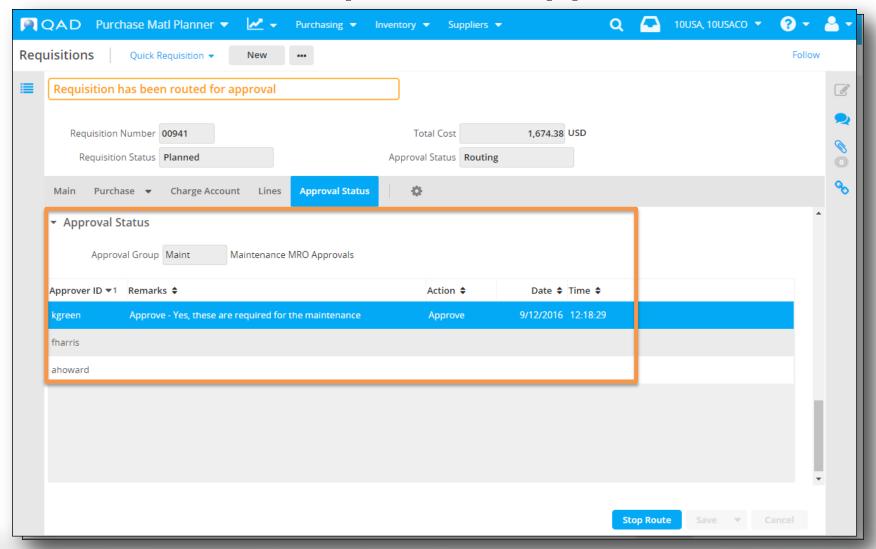


### Sarah – Creates New MRO Requisition





### Sarah – Route Req. & View Approval Status





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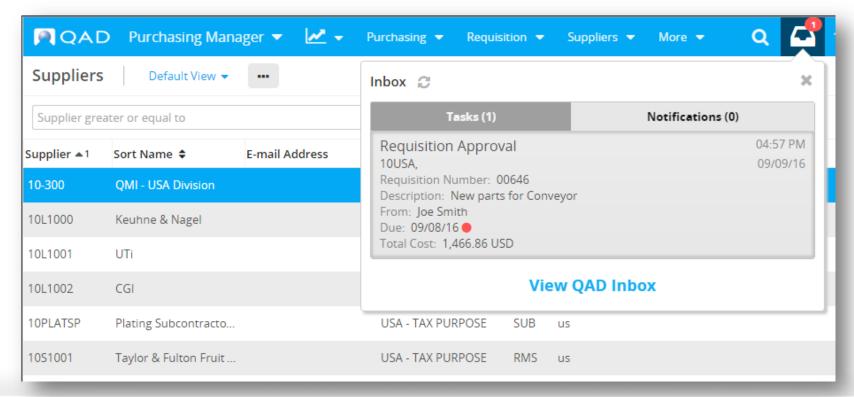
### Fred – Purchasing Manager

A Day in the Life of an Effective Manager



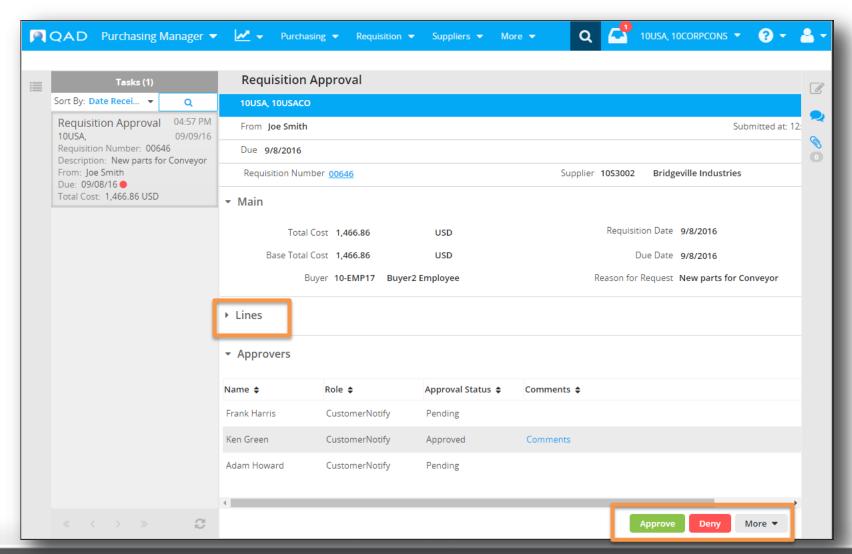
### Approvals – Inbox & Mobile

 Fred the purchasing manager notices a new notification in his inbox where he can manage his requisition approvals



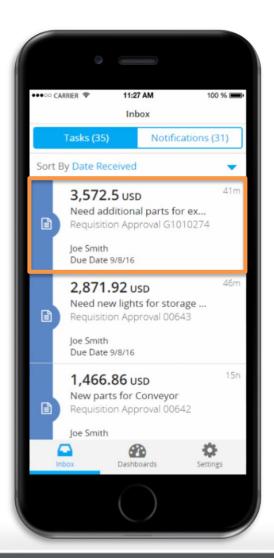


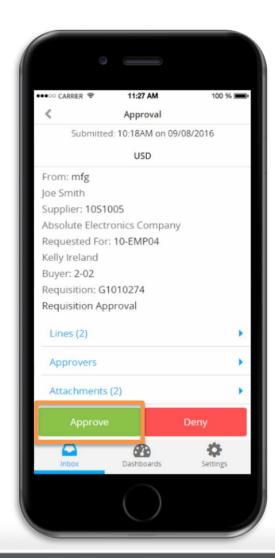
# Fred – Review and Approve Requisitions

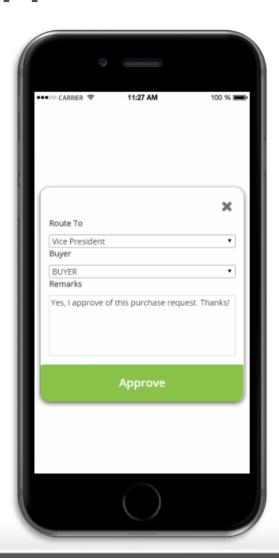




### Fred – On the road, mobile approval









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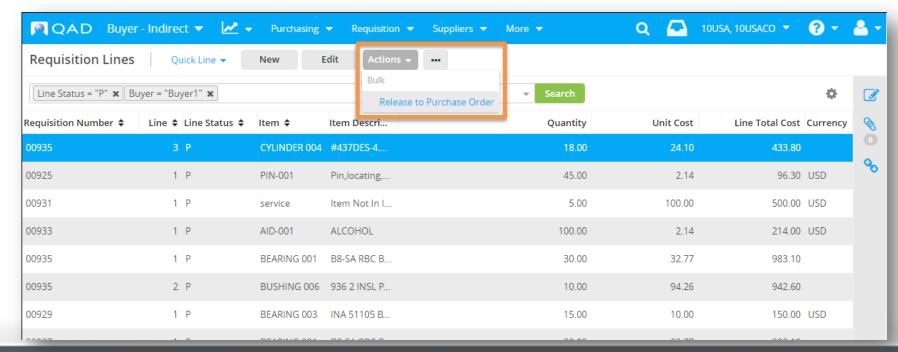
## Cindy - Company Buyer

A Day in the Life of an Effective User



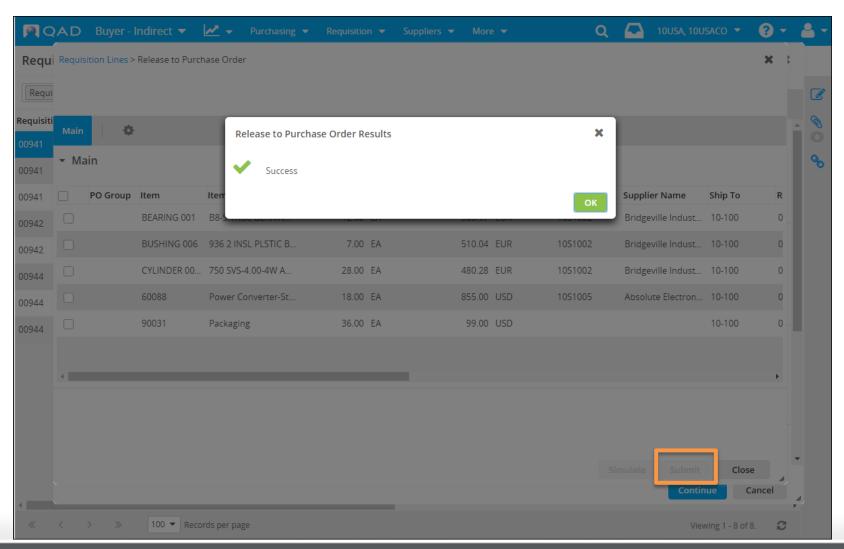
### Release to PO - Select & Create

 Cindy, the company buyer signs on to review and release authorized requisition lines to purchase orders and begin the purchasing process





## Cindy – Releases Requisition Lines to POs





### Benefits of the Effective User

- New User Experience
  - Higher productivity
  - Fewer errors
  - Greater user satisfaction





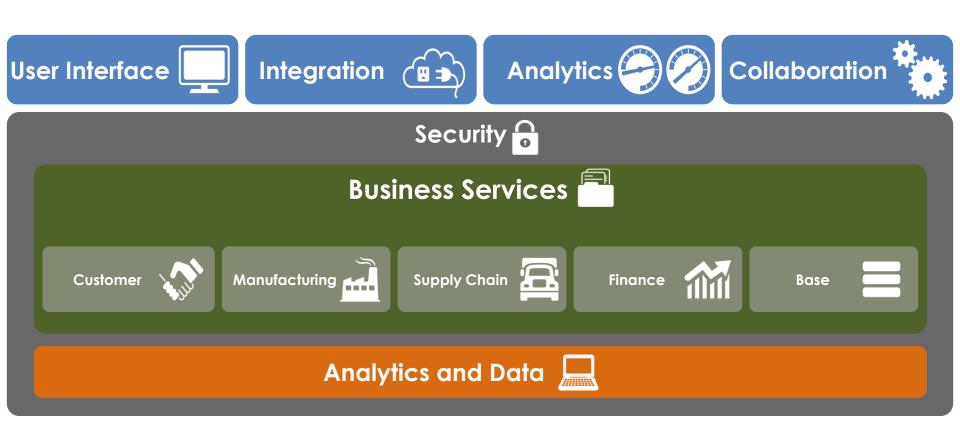
**QAD Channel Islands** 

### How Does QAD Make All This Possible?

**World Class Architecture** 



### **World Class Architecture**





### **Business Services**

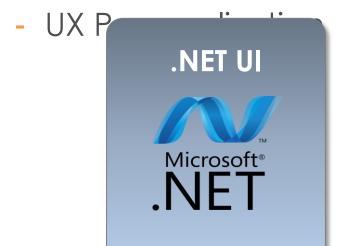
- 1875 Interfaces
- Enables Internet of Things (IoT)
- Organized into modules

Always up to date

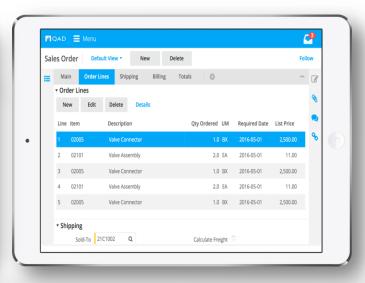


### **UI Freedom**

- Side by side
  - Minimize adoption risk
- Data driven with standard metaphors
  - Future proof
  - Mobility









## **Analytics**

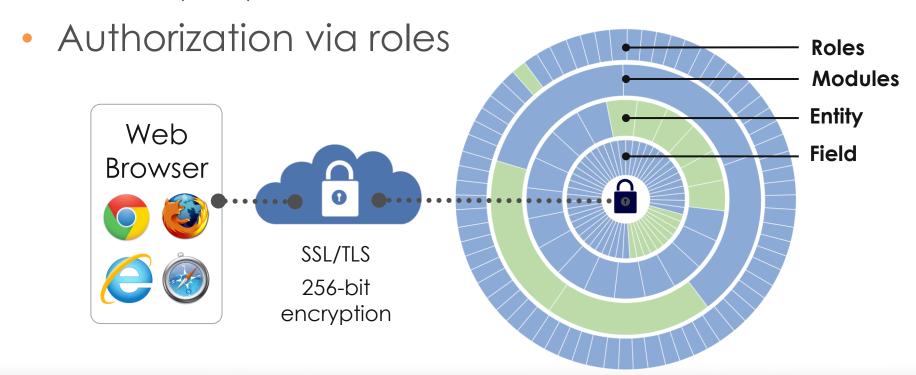
- Technology partner highly rated by Gartner
- Direct API access
- Real-time data





## Security

- Every API call encrypted
- Single sign on
  - LDAP, AD, SAML





## Veracode and Anitian Security Scans

- VeraFied by Veracode
  - Veracode Score: 99
  - Security Rating Assessment Stamp



- Anitian Penetration Test
  - Penetration test over a one month period
  - Manual and Automated





**QAD Channel Islands** 

## How Can You Participate in CI?

Early Adopters and User Research



## Channel Islands – Sept 2016 Release

- Santa Cruz 2
  - All Anacapa and Santa Cruz
  - 2015 EE\* / 2016 EE\* Cloud
  - Go-live release:
    - 10 EA customers

\*2016.1 EF required for CFO





### **Early Adopters Program**

- Currently 4 Early Adopters
  - Oct / Nov 2016 Go-lives
  - US, Europe, Australia
- Additional 6 Openings
  - 4 prospects in review





### User Research Invitation...

- Join us Send an email to <u>UX@qad.com</u>
   UX Round Table at MWUG Tracey Rhoton
- Be heard Receive invites for upcoming research
   Meet directly with R&D UX team on topics important to you
- Get social Invite your colleagues to sign up
   On topics of interest to them, with R&D UX team





## **Upcoming User Research**

- Sales Action Center
  - CRM, Sales, Service KPIs
- Service & Support (SSM)
  - Capturing Incidents
  - Managing Service Orders
- Purchase Orders
- Supplier Schedules
- Complex Product Structures
- Additional Action Centers



## Are you interested?

- Join us in the "Deeper Dive" session
- Drop by the QAD booth
- Meet Tracey Rhoton, QAD UX Manager
  - Monday Lunch Round Table
  - Tuesday Breakfast Round Table



### Thank You

- Markus Barone: mxb@qad.com
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