



QAD Adaptive Applications

User Requirements Specifications QAD EQMS Applications Admin Tools

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Admin Tools User Requirements Specification Change Summary

The following table summarizes significant differences between this document and previous versions.

Date/Version	Description	Reference	Changed By
JULY 2020/v2020	Initial upload	--	RQT
MAR 2021/v2021	Update versioning	--	RQT
AUG 2021/v2021.1	Updated AppXtender; Updated System Admin	p. 6, p. 8	RQT
MAR 2022/v2022	Update versioning; Updated System Admin	p. 8	RQT
SEPT 2022/v2022.1	Updated versioning; Updated System Admin; Updated AppXtender	p. 8, p. 6	RQT
MAR 2023/v2023	Updated versioning	--	RQT
MAR 2024/v2024	Updated versioning; Updated System Setup	p. 9	RQT
SEPT 2024/v2024.1	Updated versioning; Updated System Admin	p. 8	RQT
MAR 2025/v2025	Updated versioning; Updated AppXtender; Updated System Admin; Updated System Setup	p. 6, p. 8, p. 9	RQT
SEPT 2025/v2025.1	Updated versioning; Updated AppXtender; Updated System Admin	p. 6, p. 8	RQT
SEPT 2026	Updated versioning; Updated System Admin; Updated Admin App; Updated AppXtender	p. 8, p. 6, p. 6	F6J

Confidentiality

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Purpose

This requirements specification includes the documentation of the EQMS Applications business requirements for the EQMS Admin Tools version 2026.

This document was used as the basis for the configuration of the Admin Tools and shall be used in the definition of testing criteria for operational qualification.

Scope

The scope of this document is to define the EQMS Applications business requirements for the Admin Tools version 2026.

Administration

Administration Application

1. The system shall provide the ability to show total login history for user and licensing monitoring.
2. The system shall allow administrators to build and define "How do I" articles to help users.
3. The system shall allow the ability to manage QXtend configurations for QAD ERP integration.
4. The system shall provide a place to manage supplier account creation in QAD Supplier Portal and OneLogin.
5. The system shall provide the ability for an employee to update out of office information in their employee record.
6. The system shall provide access to the integrated QAD Champion AI tool to search EQMS documentation (added in v2026).

System Setup Application

1. The system shall allow for setup and management of Domains, Entities, and Sites.
2. The system shall allow for setup and management of:
 - a. Locations
 - b. Notification Groups
 - c. Generalized Code Types and Generalized Codes
 - d. Unit of Measure
 - e. Item Groups
 - f. Item Types
 - g. Departments
 - h. Work Centers
 - i. Management System Standards
 - j. Review Frequencies
 - k. Company Types
 - l. Cost Accounts
 - m. Currencies
 - n. Exchange Rates
 - o. Shifts

AppXtender

1. The system shall provide the ability to allow the user to tailor the system in the following ways:
 - a. **States** – Adding new states, new state moves, and associated security.
 - b. **Field Changes** – Field name, adding required states, field help.
 - c. Adding fields of the following types and adding required states, field help, default or calculated expression:
 - i. Audit Trail
 - ii. Auto Number
 - iii. Check Box

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- iv. Checklist (added in 2021.1)
 - v. Choice (added in 2021.1)
 - vi. Cross Reference
 - vii. Date Time
 - viii. Display List
 - ix. Label
 - x. Numeric
 - xi. Picture
 - xii. Response (added in 2021.1)
 - xiii. Reverse Cross Reference
 - xiv. Text
- d. **Record Security** – Opening up security for other security roles to add/delete records.
 - e. **Field Security** – Opening up security for other security roles and state combinations for existing and new fields.
 - f. **Report Security** – Modifying the roles that can view a report.
 - g. **Command Security** – Opening up security for other security roles and state combinations for existing commands.
 - h. **Rules** – Adding new rules.
 - i. **Inbox Actions** – Adding new inbox actions and modifying documentation, subject, and body of the inbox action.
 - j. **Transaction** – Adding new transactions.
 - k. Adding the following new items to the Execution Plan:
 - i. Self Update Transactions
 - ii. Fields Backcolor
 - iii. Fields Visibility
 - iv. Inbox Actions
 - v. Transactions
 - vi. Services
 - l. Adding new filters.
 - m. Adding new and modifying existing detail screen layouts.
 - n. Adding new and modifying existing search screen layouts.
 - o. Adding new reports and changing the description or deactivating existing reports.
 - p. Adding new and modifying existing metrics.
 - q. Adding new KPIs.
 - r. Adding new and modifying existing web services.
 - s. Adding new and modifying existing Esync events.
- 2. The system shall allow customers to extend the product and depart from the default roles able to add or delete records (added in 2022.1).
 - 3. The system shall provide the ability to copy Integration – Webservices (added in v2025).
 - 4. The system shall provide a way to refresh filter definitions in related processes that use then (e.g. for drop-downs) when they are modified (added in v2025).
 - 5. The system shall provide the ability to apply a filter to a multi-select Reverse Cross Reference field type (added in v2025).
 - 6. The system shall provide the ability to set visual indicator symbols that apply to Checklist fields to represent a visual status of each result (added in v2025.1).

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7. The system shall provide the ability to create Time based Notification prompts to the user to processes where scheduling is enabled (added in v2025.1).
 8. The system shall provide the ability to copy a detailed layout in a process in order to have a starting point for a custom layout (added in v2025.1).
 9. The system shall provide the ability to use OAuth 2 authentication with Integration (added in v2025.1).
 10. The system shall provide the ability to assign Detail Layouts and Search Screen Layouts to Roles by Process (added in v2026).
 11. The system shall allow a user with an assigned role to select between available layouts (added in v2026).

System Admin

1. The system shall allow the management of user accounts.
2. The system shall provide a view of the active clients.
3. The system shall provide the ability to set up different calendars for scheduling purposes.
4. The system shall provide a tool to query the SQL database (read only – excludes action queries).
5. The system shall provide the ability to monitor Esync activity.
6. The system shall allow the definition of frequency patterns for scheduling purposes.
7. The system shall provide the ability to monitor web services activity.
8. The system shall provide a log of any errors.
9. The system shall allow the user to add-remove items from the navigation menu and change the security role access.
10. The system shall provide the ability to create role-based dashboards and gadgets.
11. The system shall allow for management of new security roles.
12. The system shall provide a way to filter the integration event log using a keyword (added in 2021.1).
13. The system shall allow a user to view the revision history for AppXtender changes and be able to filter (added in 2021.1).
14. The system shall allow the ability to make a user an Administrative user in the UI (they can do almost anything) and yet have separate control of the Administrative rights within the administrative tools (added in 2022).
15. The system shall allow the option to automatically disable an employee's account if the employee record moves to the Inactive state (added in 2022.1).
16. The system shall automatically disable a supplier contact account if the contact record moves to the Inactive state (added in 2022.1).
17. The system shall provide the option to manage data loading for virtually any process/screen/table including new extended fields (added in 2024.1).
18. The system shall provide the ability to self-discover API integration format and content (added in 2024.1).
19. The system shall provide a way to bulk replace open assignments from one employee to another (added in v2025).
20. The system shall provide the ability to create Frequency Pattern Management options hourly to support time-based inspections (added in v2025.1).
21. The system shall provide standard level 1 Integration Web Services for REST (added in v2026).

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22. The system shall provide the ability for Approval data to be accessed by a Gadget (added in v2026).

System Setup

1. The system shall provide a way to set up connection to the email server.
2. The system shall provide management of enabled languages.
3. The system shall allow some customization of the login page.
4. The system shall allow control of data for control of performance.
5. The system shall provide setup to single sign on (SSO) services.
6. The system shall allow the setup of system parameters based on the current user.
7. The system shall provide a method to set up paths for files, reports, etc. for initial install.
8. The system shall allow the configuration of profiles for different LDAP servers.
9. The system shall provide a method to manage account disabling rules and password aging restrictions (when LDAP and SSO not used).
10. The system shall allow the configuration of session inactivity time-outs.
11. The system shall allow an admin user control whether the "Reason for Approval" is enabled or not for all approvals in the system (added in 2024).
12. The system shall provide the option to manage external OAuth clients (added in 2024).
13. The system shall provide a way to control the password complexity if using the authentication built into the product (added in 2025).