QAD Adaptive Applications

Technical Reference

QAD EQMS Installation Guide

70-3411-2026

QAD EQMS 2026

September 2026

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QAD EQMS Installation Guide Change Summary

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

Date/Version	Description	Reference	Changed By
MAY 2019/v2019	Initial upload	--	DHY
MAR 2020/v2020	Rebranded for 2020	--	DHY
SEPT 2020/v2020.1	• Updated product titling to remove "CEBOS" • Rebranded for 2020.1 • Added section for Admin password changes • Updated many screenshots to show more current version of Site Manager • Fixed grammatical errors	--	DHY
MAR 2021/v2021	• Rebranded for 2021 • Added information for the elastic search • Added information for the notification service • Added information for the tracking service	p. 16, p. 1, p. 29, p. 30, p. 40, p. 41	DHY
SEPT 2021/v2021.1	Rebranded for 2021.1	--	DHY
MAR 2022/v2022	Rebranded for 2022	--	DHY
SEPT 2022/v2022.1	Rebranded for 2022.1; Added a section for Installing the EZDL Service	p. 1	DHY
MAR 2023/v2023	Rebranded for 2023; Modified Web Server Setup (IIS); Added section: Set Up Esync API; Added section: Set Up Document Service Site; Added section: Esync Service Configuration; Added section: Set Up DocumentService Config; Removed expired information	p. 11, p. 28, p. 29, p. 37, p. 38	DHY

Date/Version	Description	Reference	Changed By
MAR 2024/v2024	Updated versioning; Modified Web Server Setup (IIS); Modified Performing the Installation; Modified Setup Email; Added Apply Food and Beverage Strings	p. 11, p. 16, p. 45, p. 48	DHY
SEPT 2024/v2024.1	Updated versioning; Removed Installing the EZDL Service	--	DHY
MAR 2025/v2025	Updated versioning	--	DHY
SEPT 2025/v2025.1	Updated versioning	--	DHY
SEPT 2026/v2026	Updated versioning	--	F6J

Chapter 1

Introduction

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Introduction

The installation of QAD EQMS 2026 is performed using a utility called Site Manager. Site Manager handles the installation and updates of the QAD EQMS 2026 application.

About This Guide

This installation guide focuses on:

- Prerequisites for using Site Manager
- Downloading and installing Site Manager
- Downloading the QAD EQMS 2026 package
- A step-by-step guide for the installation process, including:
  - Setting up a SQL account to manage the databases
  - Creating a Site in IIS, assigning bindings, assigning SSL Certificates, and creating Application Pools
  - Walk through of each screen in Site Manager
  - Encrypting sensitive configuration files
  - Installing the EZDL service
  - Updating system paths, email, and LDAP information

Prerequisites for the Installation of QAD EQMS 2026

Below are the technical requirements to run Site Manager. These should all be present prior to running Site Manager utility on the Web Server

- All prerequisite links can be found here: Package Website
- Site Manager Prerequisite files. These are located on Package Website
- A Local or Domain Administrator account
  - In situations where files are being stored off the Web Server, a Domain account with access to the Web Server and the server where the files are stored is required. This account will also run the Esync Windows service and the Application Pools

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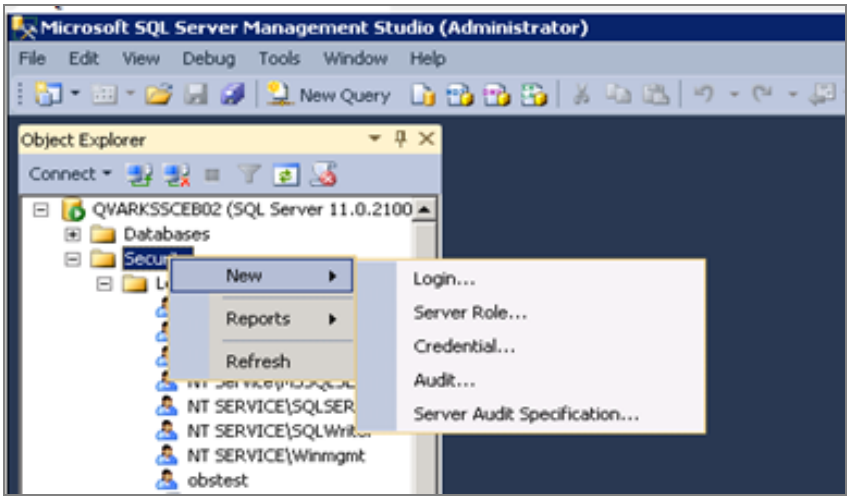
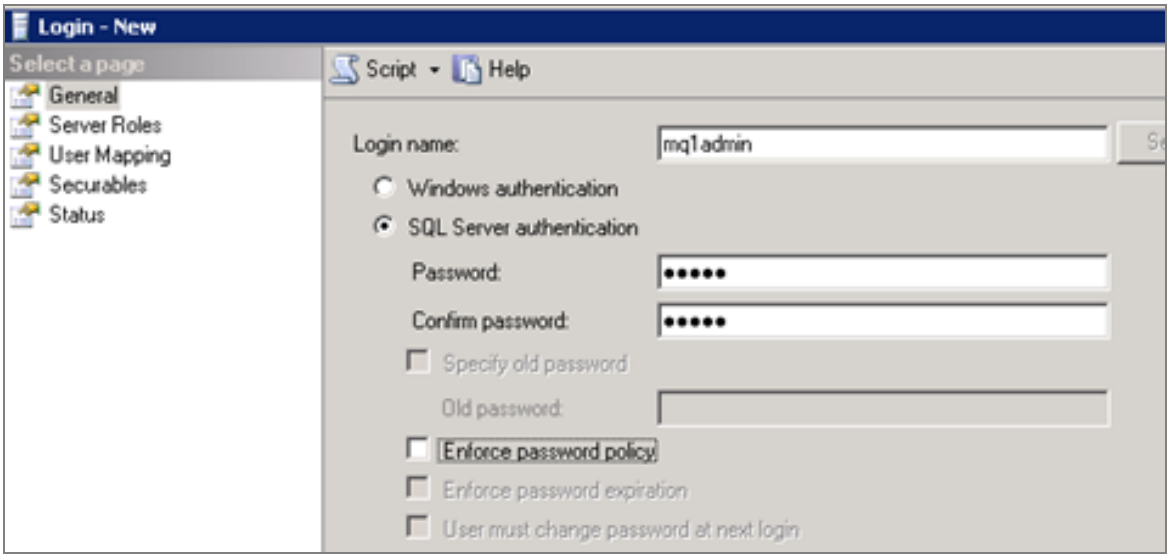
SQL Server Setup

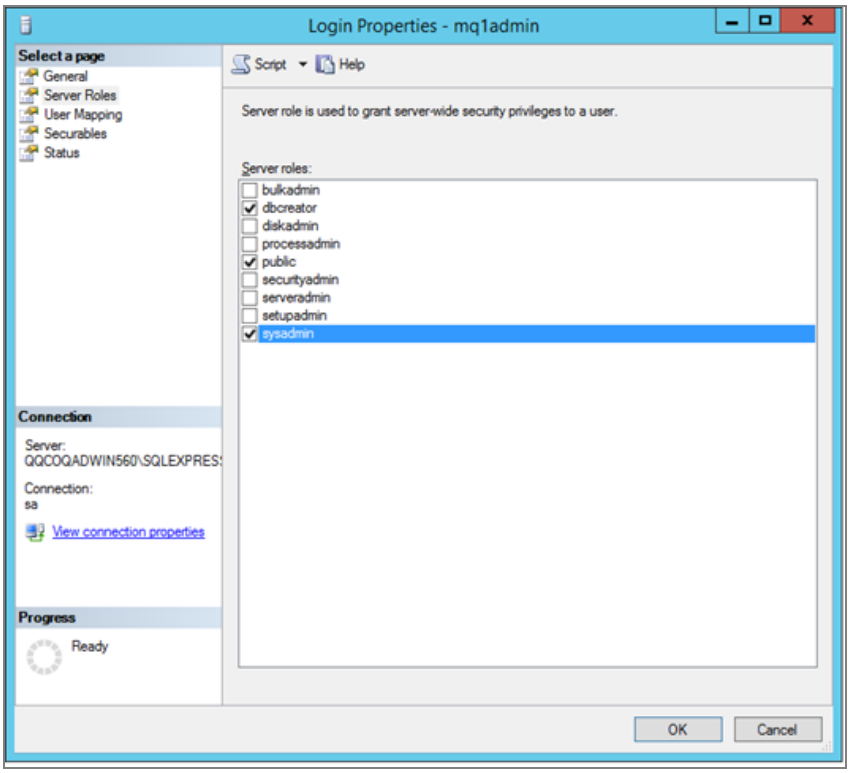
1. Create a new login to be used to connect to SQL Server.
    a. Log in with the SA or any admin account, right-click on Security, select New, and select Login.
    b. Fill in the Login Name, select SQL Server Authentication, set the password, and deselect "Enforce Password Policy".

i. 

ii. 

2. Set the Server Roles that the new login will use. These are the required roles; however, more roles can be selected if needed.

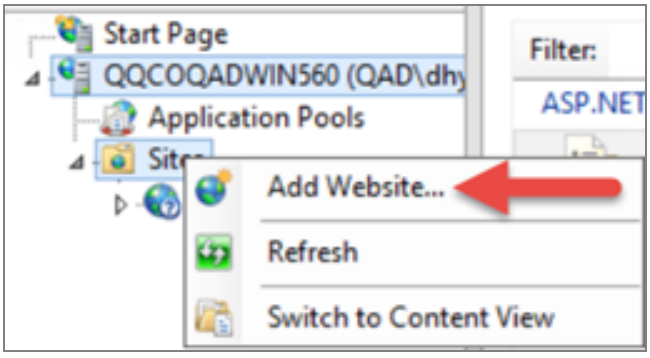
a. Click Server Roles in the left panel.
b. Assign the login the dbcreator, sysadmin, and public roles.

i. 

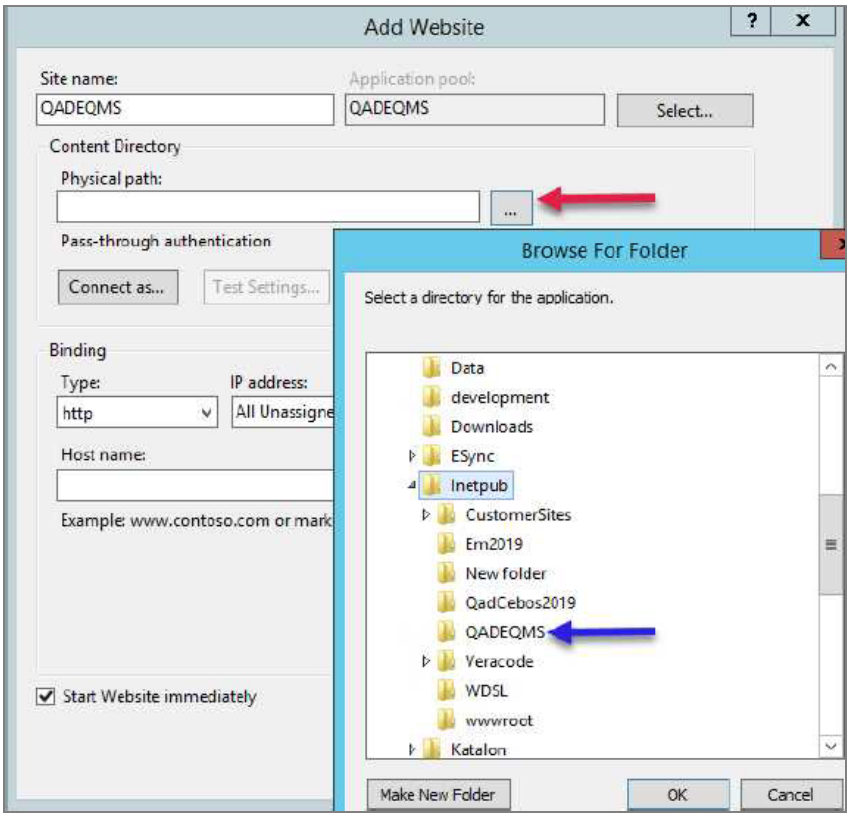
3. Click OK and verify the login is successful with the new username.
4. Run the following query against the Master Database to determine if Full Text Search is enabled. If it returns "1" then it is enabled. If it returns "0" then it is not enabled. If the customer wishes to utilize the Global Search functionality, Full Text needs to be enabled.
    - `SELECT FULLTEXTSERVICEPROPERTY ('IsFullTextInstalled')`

Web Server Setup (IIS)

1. Create a Site in IIS
    a. In IIS, right-click the Sites icon and select "Add Website".

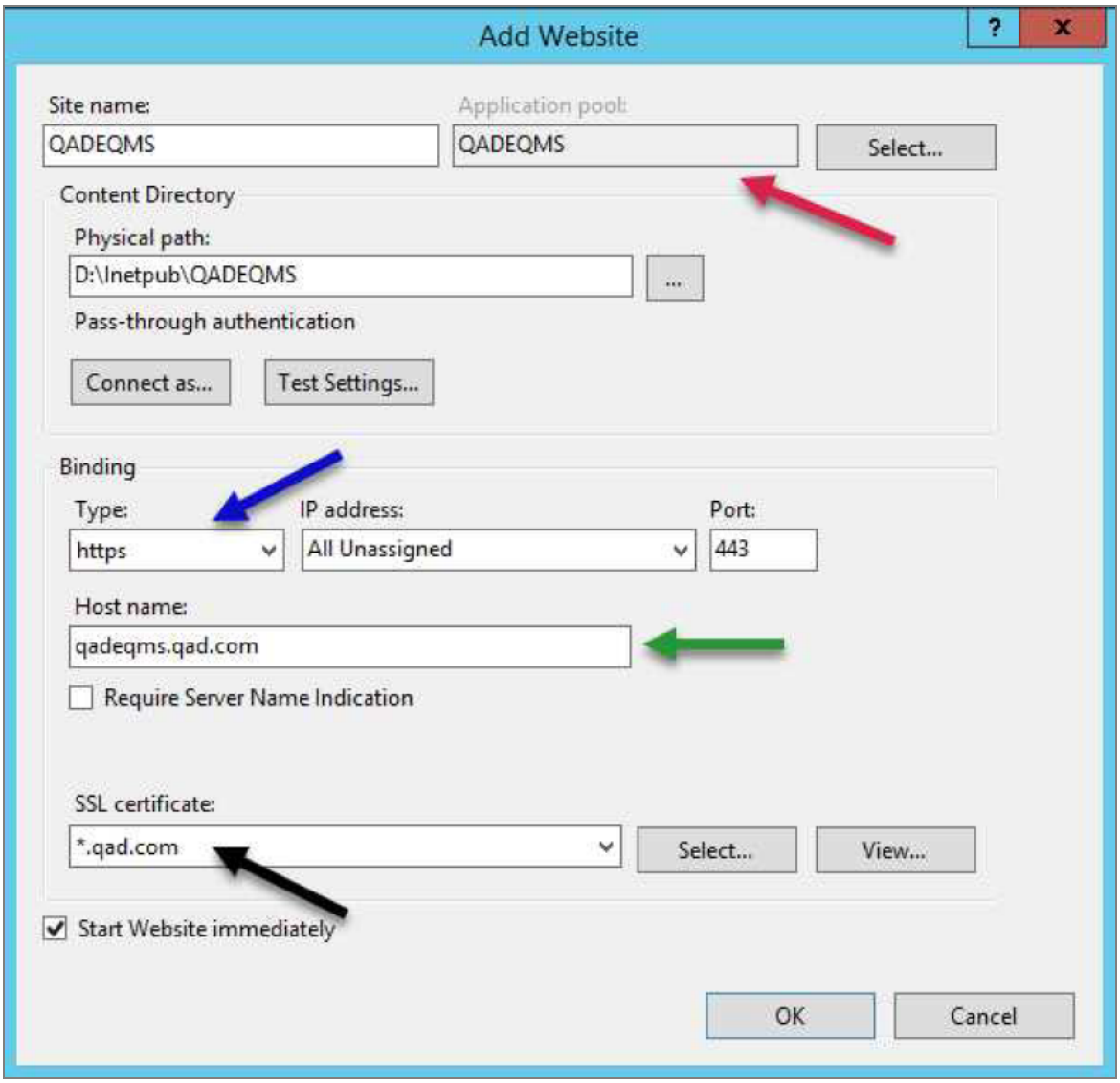
i. 

b. Fill in the Site and select/create the Physical Path (red and blue arrows).

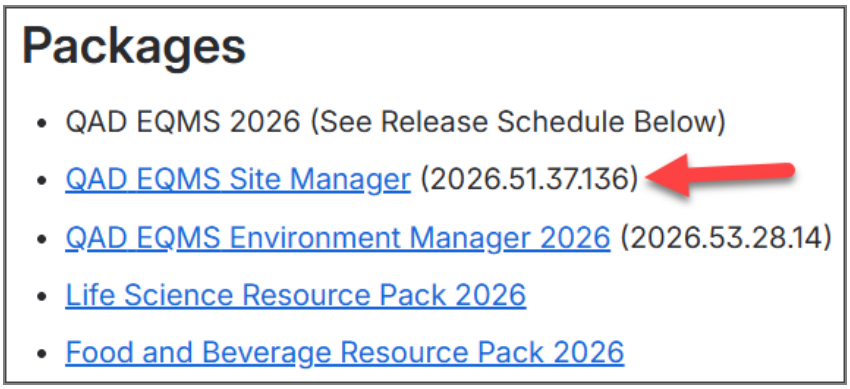
i. 

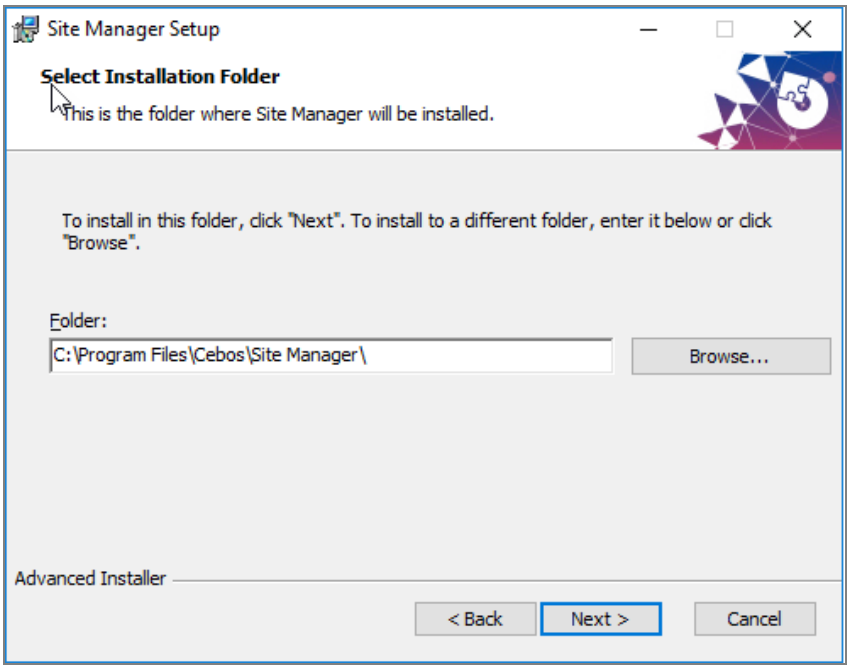
c. Select the Application Pool to DefaultAppPool. Set the Binding Type to https (blue arrow). Set the Host Name to the URL created for the Site (green arrow). The Host Name will be the URL the users use to connect to the Application and should be determined by the customer. Set the SSL Certificate (black arrow).

i.


Add Website
Site name:
QADEQMS
Application pool:
QADEQMS
Select...
Content Directory
Physical path:
D:\Inetpub\QADEQMS
...
Pass-through authentication
Connect as...
Test Settings...
Binding
Type:
https
IP address:
All Unassigned
Port:
443
Host name:
qadeqms.qad.com
Require Server Name Indication
SSL certificate:
*.qad.com
Select...
View...
Start Website immediately
OK
Cancel

Download Site Manager and the QAD EQMS 2026 Package

1. Navigate to the QAD EQMS 2026 QDN page.
   a. Click the QAD Site Manager link.
      i. 

   b. In the Patch Release Schedule located at the bottom of the QDN page, grab the latest Package Version.
2. Install Site Manager
   a. Open the Msi file and complete the installation. When choosing the location for Site Manager, keep in mind that backups of site files created each time an update is done are stored in the root of Site Manager. It is recommended to install Site Manager on a drive with enough space to house these backups.
      i. 

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Install QAD EQMS 2026

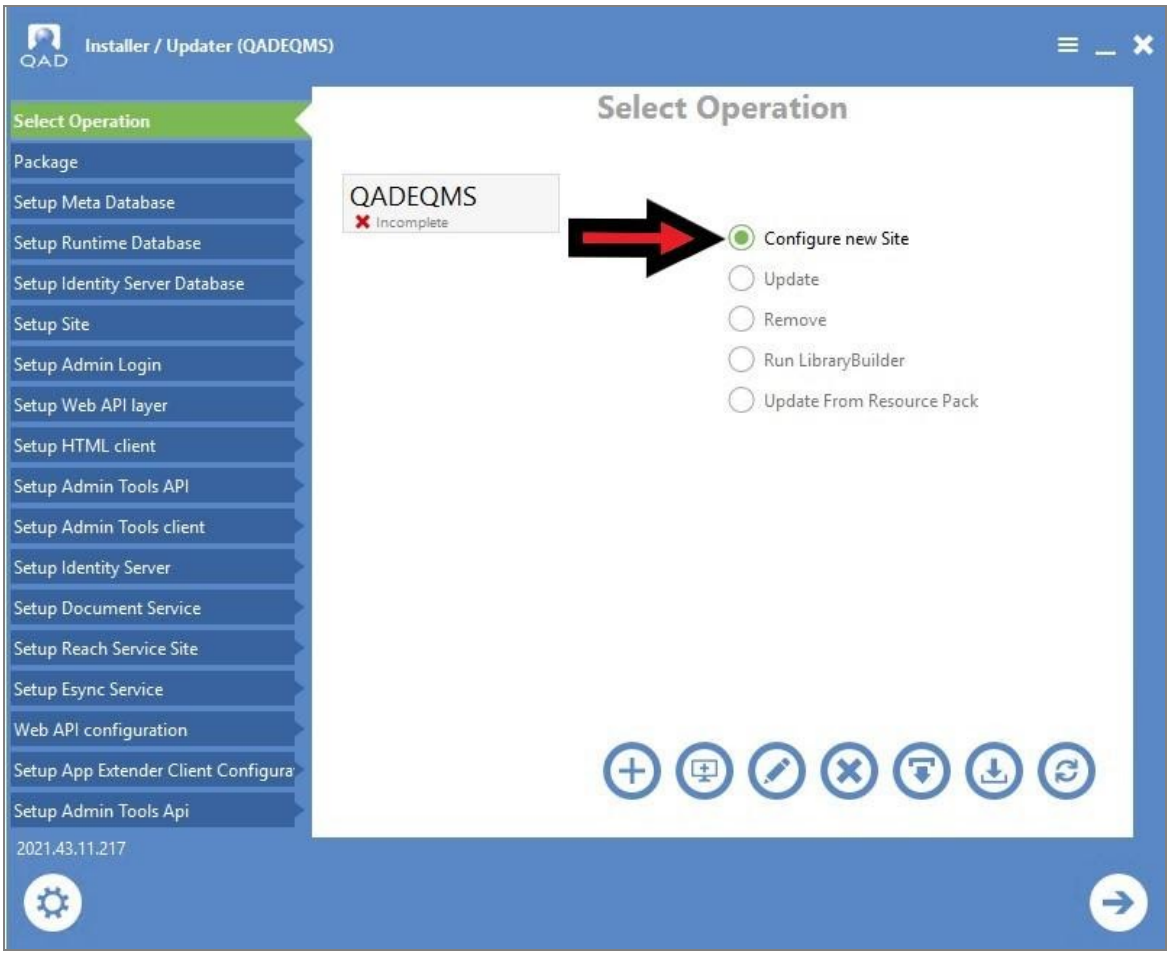
Open Site Manager and Begin Installation

1. On the opening page, click the "+" button near the bottom of the screen.

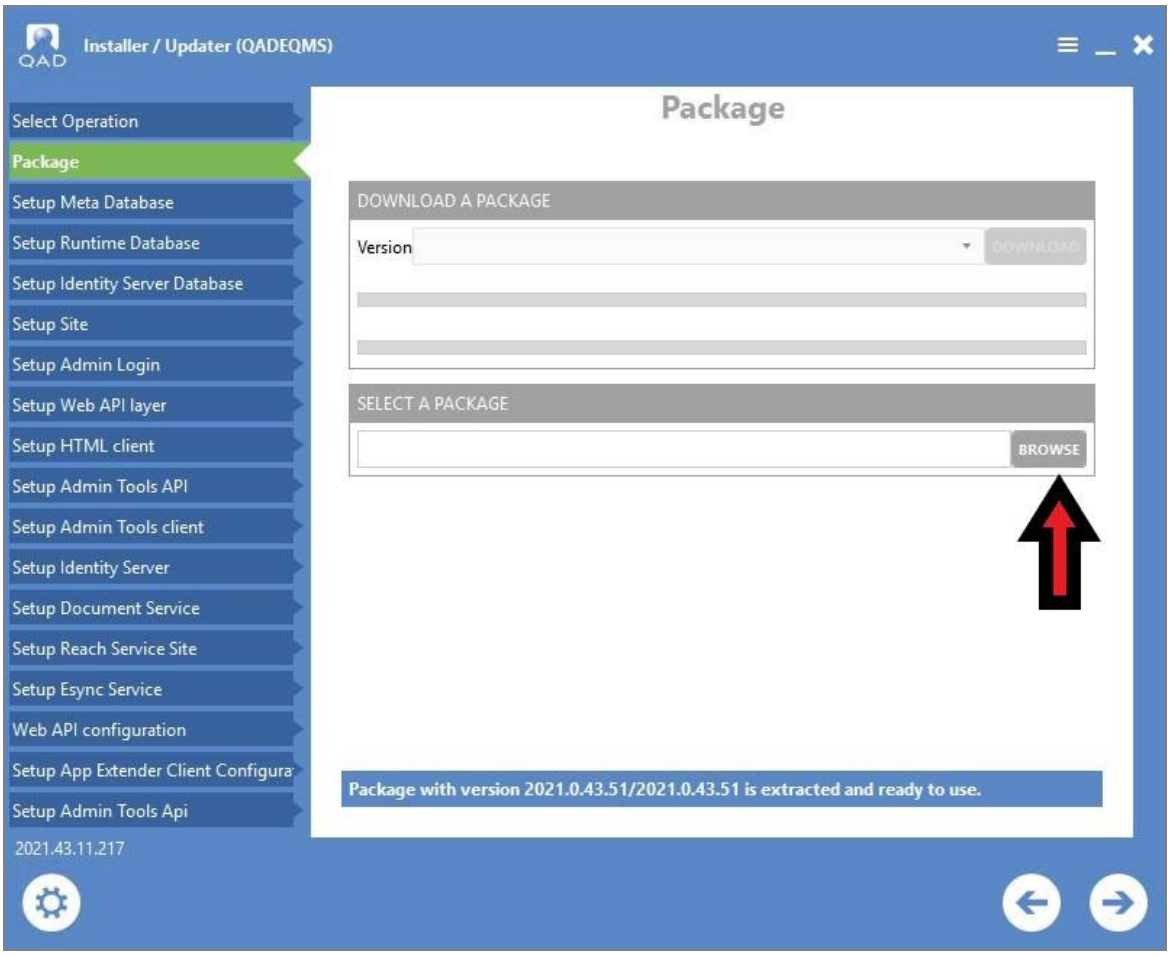
a.

2. Fill in the name of Site and click OK.

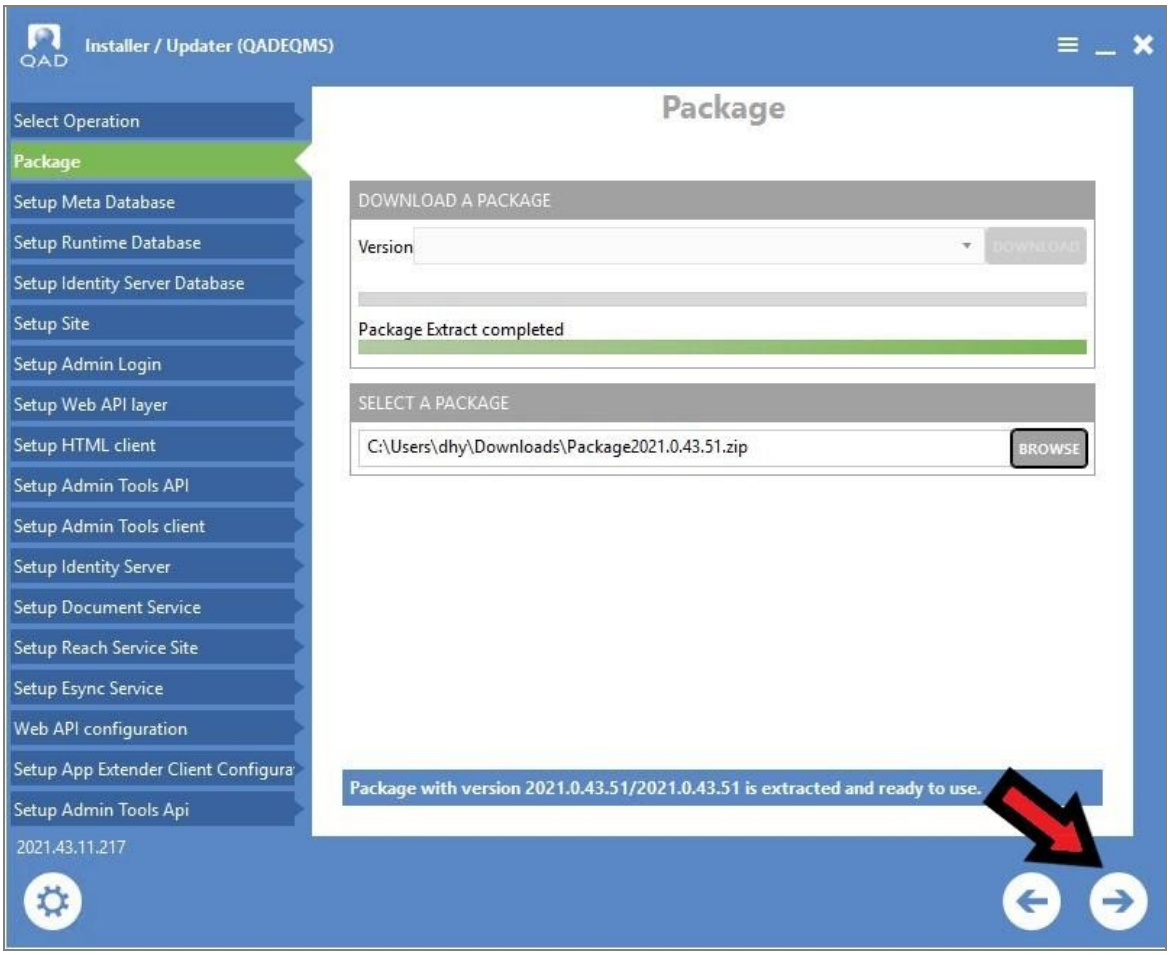
a.

3. Select Configure New Site (red arrow) and click the Next arrow.
   a. 

4. Click the Browse button (red arrow) and navigate to the location in which the package was downloaded.

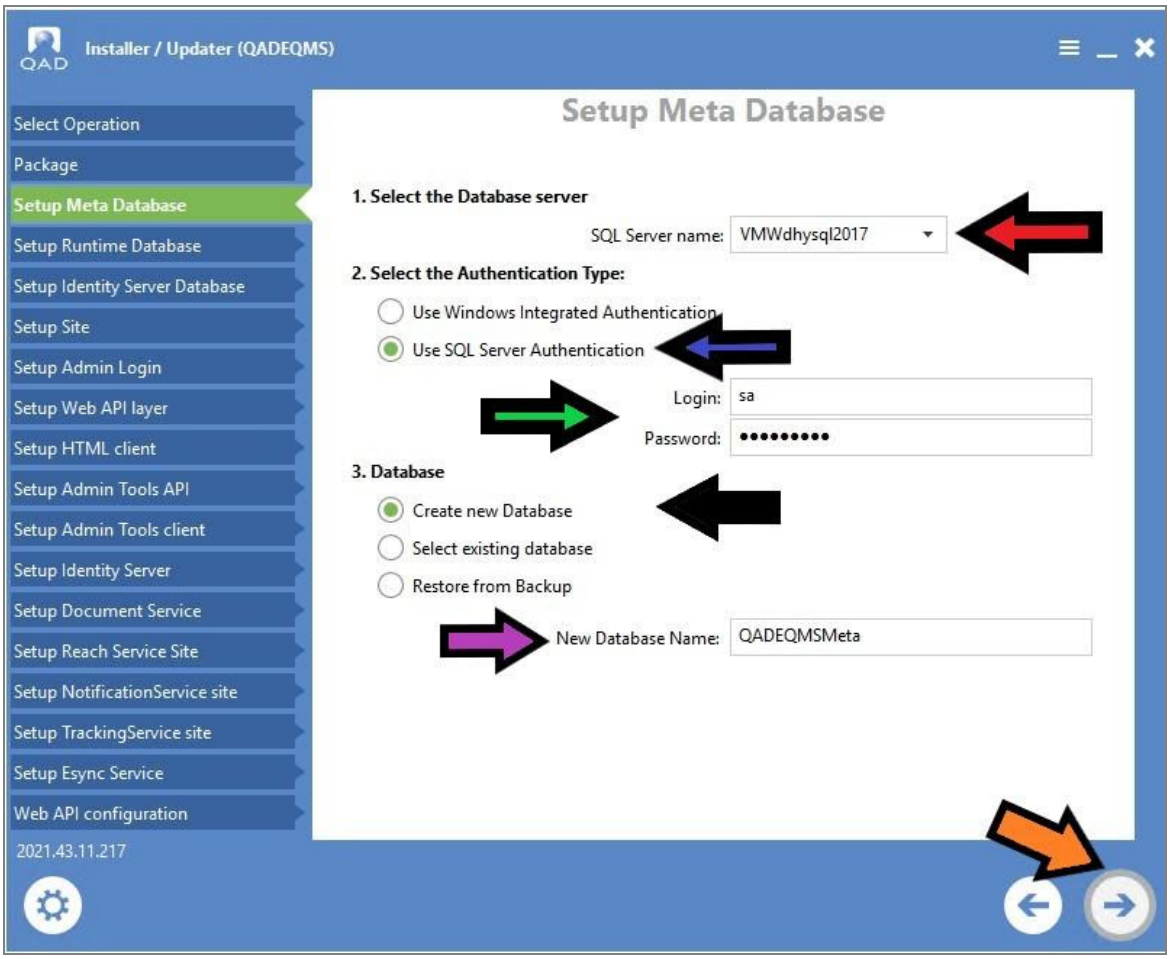
a. 
Installer / Updater (QADEQMS)
Select Operation
Package
Setup Meta Database
Setup Runtime Database
Setup Identity Server Database
Setup Site
Setup Admin Login
Setup Web API layer
Setup HTML client
Setup Admin Tools API
Setup Admin Tools client
Setup Identity Server
Setup Document Service
Setup Reach Service Site
Setup Esync Service
Web API configuration
Setup App Extender Client Configura
Setup Admin Tools Api
2021.43.11.217
Package
DOWNLOAD A PACKAGE
Version
DOWNLOAD
SELECT A PACKAGE
BROWSE
Package with version 2021.0.43.51/2021.0.43.51 is extracted and ready to use.

5. Wait for the package to extract and click the Next arrow (red arrow).

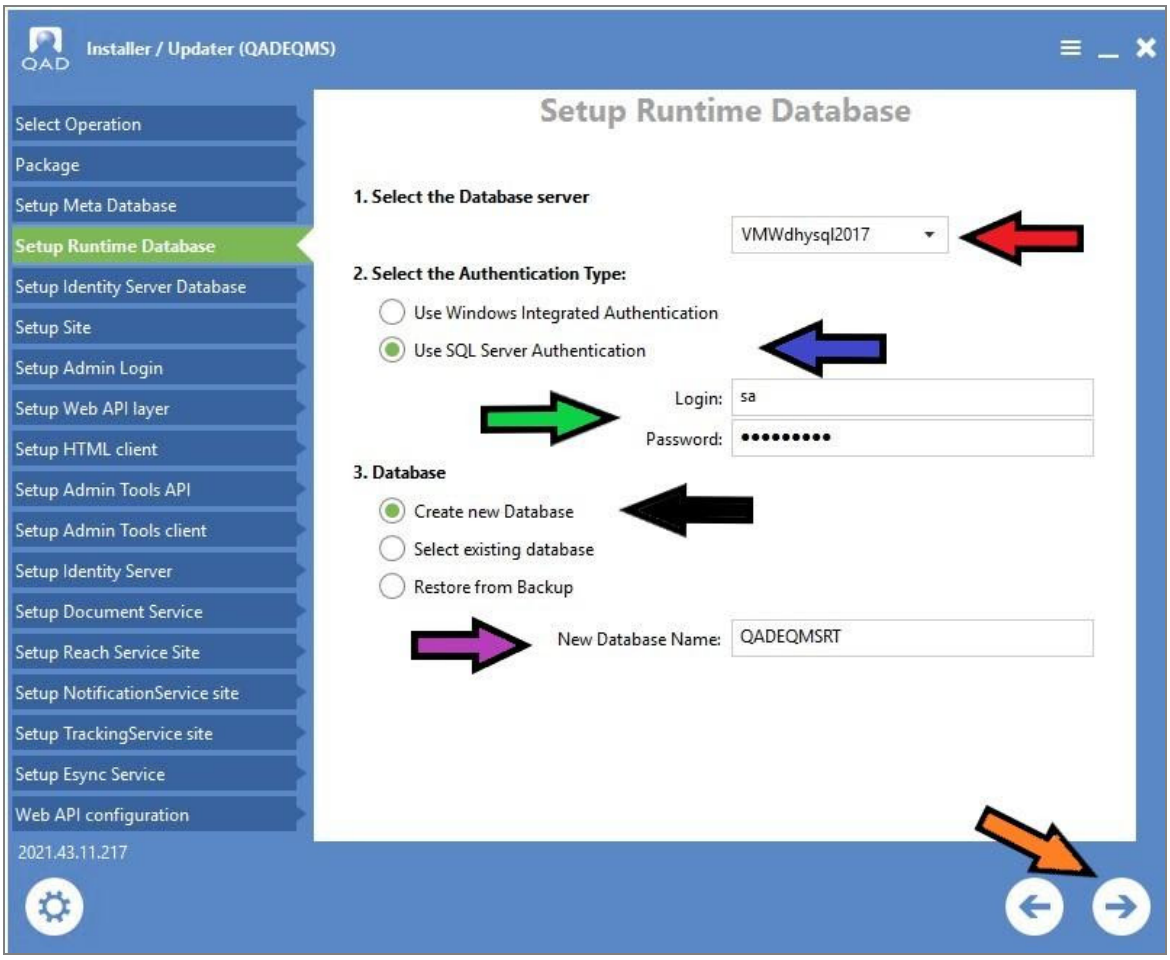
a. 

Set Up the Databases

1. For the Meta Database, enter the SQL Server Name (red arrow), SQL Authentication (blue arrow), SQL Login Info (green arrow), Create a New Database (black arrow), and you can change the name of Database if needed (purple arrow). Then click the Next arrow (orange arrow).

a. 

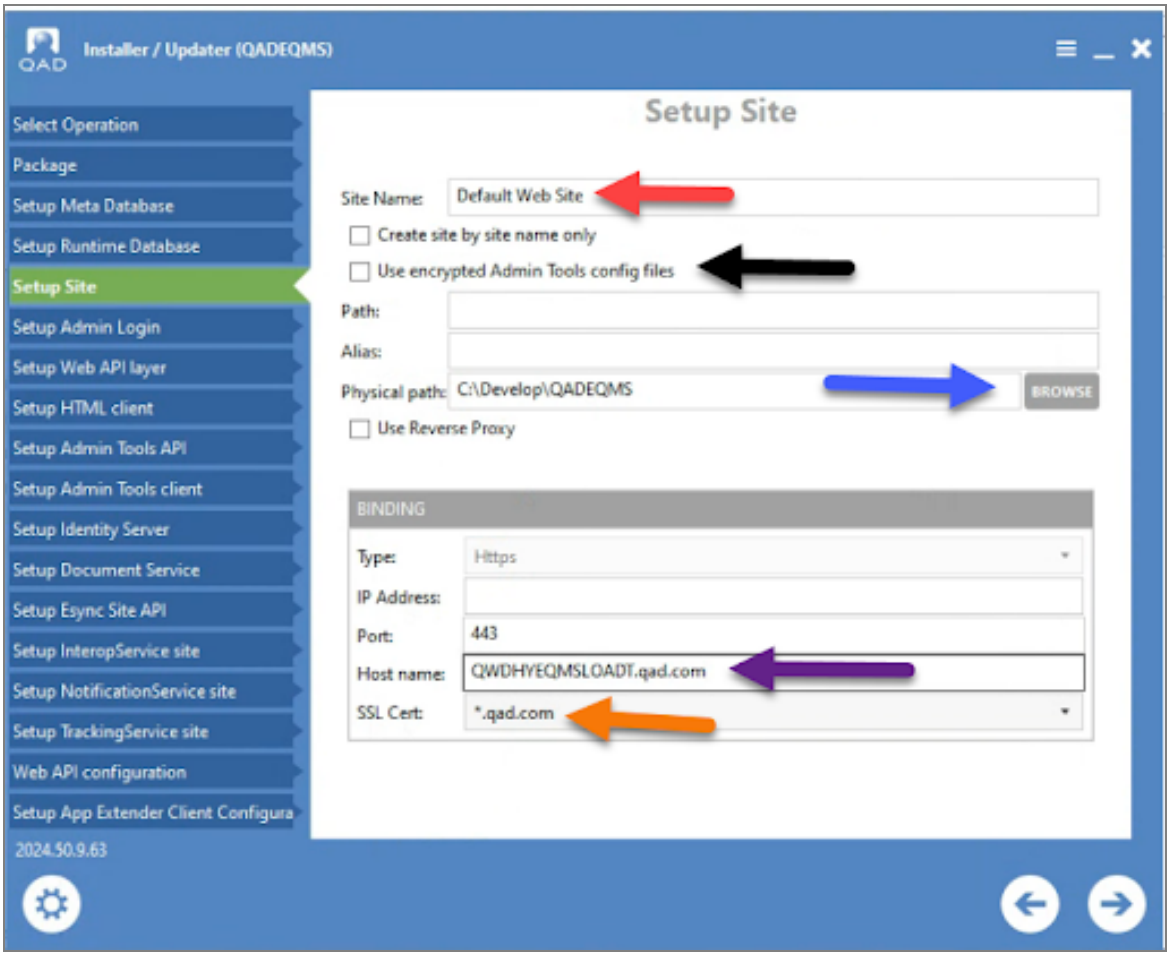
2. For the Runtime Database, all sections should be filled in. If needed, you can change the Database Name (purple arrow). Click the Next arrow (orange arrow).

a. 

Set Up the Application Site

1. Enter the Site Name as it is in IIS (red arrow), check the Use Encrypted Admin Tools config files check box (black arrow), set the Physical Path (blue arrow), set the Host Name to be the same as the Host Name set in the Site creation in IIS (purple arrow), and

set the SSL Cert (orange arrow).

a. 

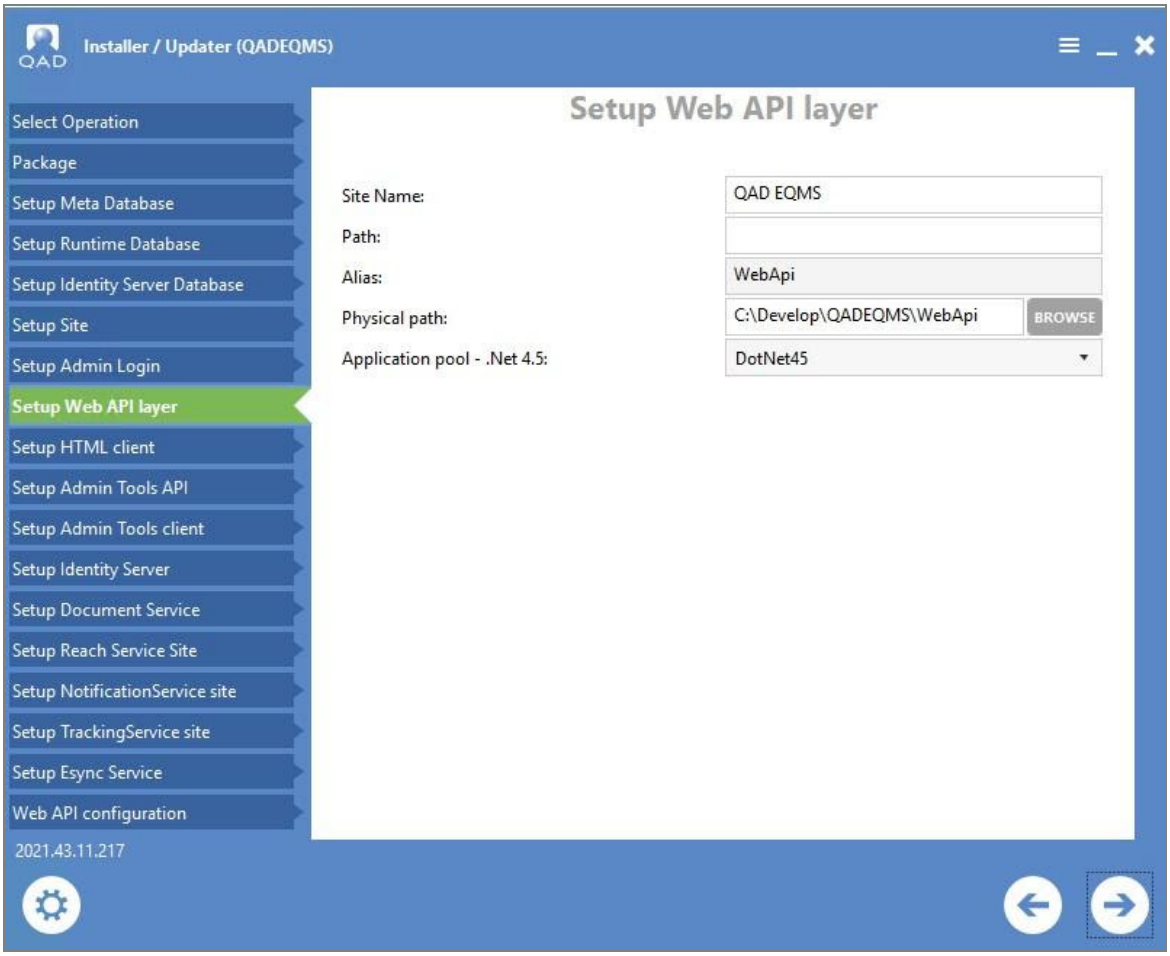
Creating the Admin Password

1. Create a unique admin password. Note that the password can no longer be aimhi. This password will be used in the Runtime Client and the Admintools Client for the admin account. This password needs to be record-kept as with encrypted configurations, it CANNOT be recovered.

a.

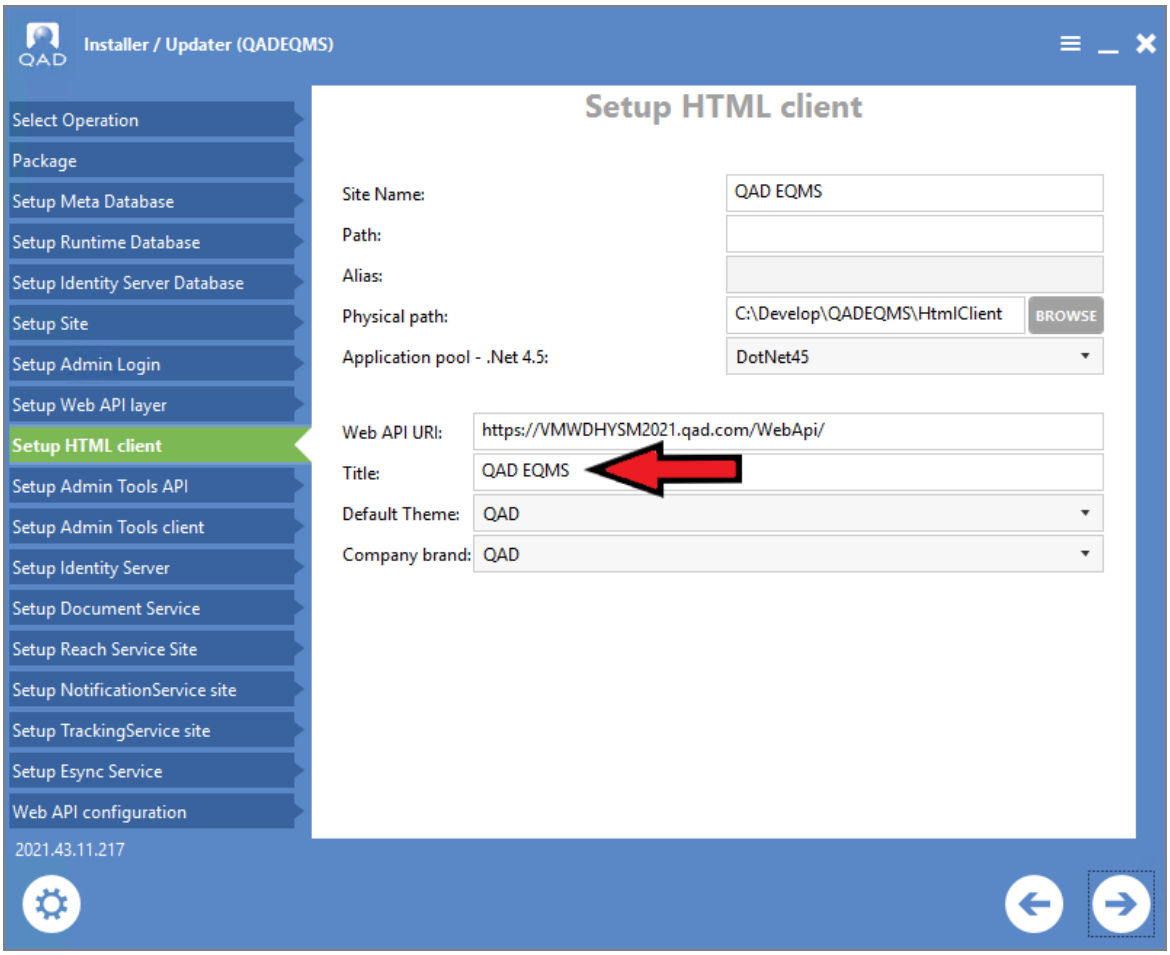
Set Up the Web API Layer

1. At this point of the installation, no input is required from the user, aside from moving through each screen. During this section, make sure the values here are valid.

a. 

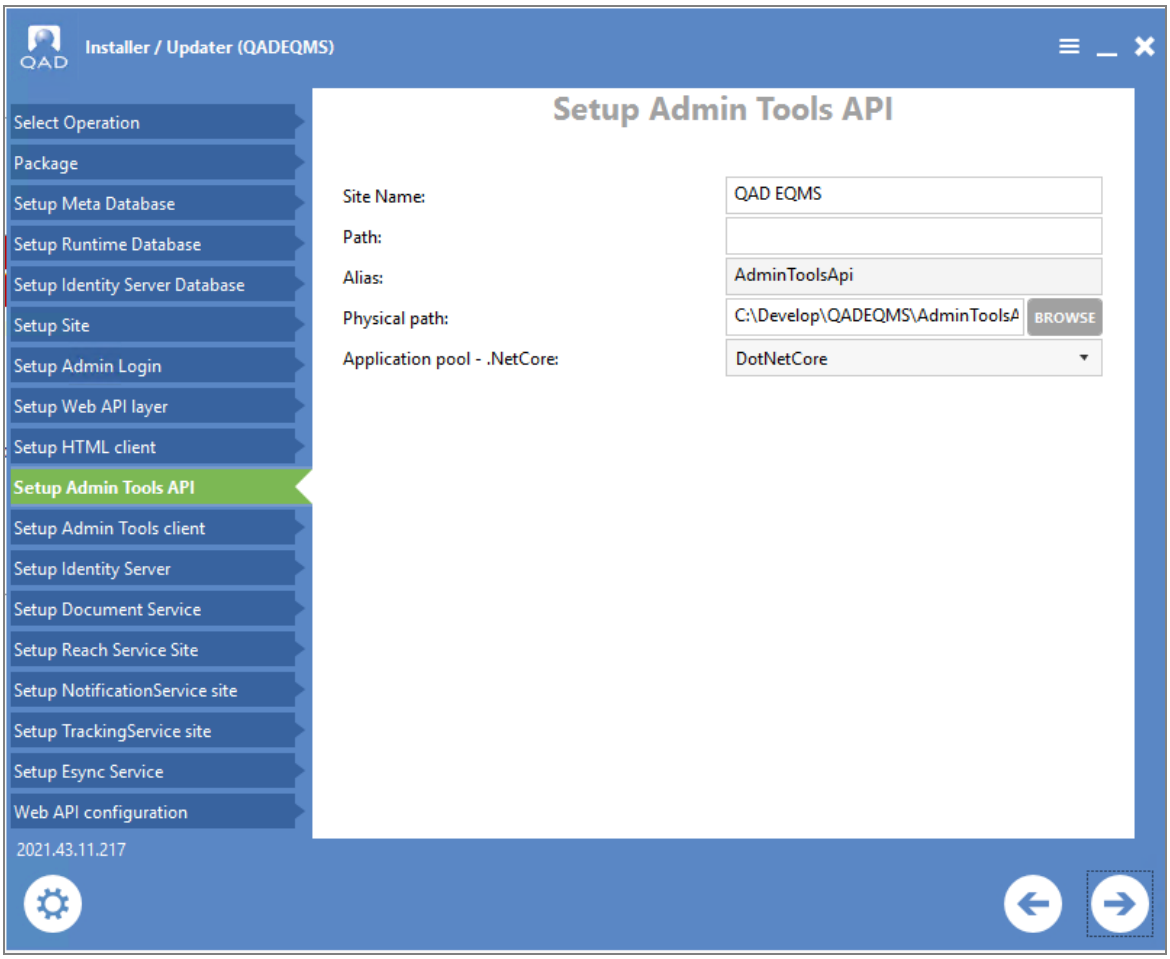
Set Up the HTML Client

On the HTML Client page, you can change the preset Title (red arrow). The Title will show in the Application (in the upper right) and it will also be the Hyperlink text in Action Emails. This defaults to QAD EQMS but can be changed.



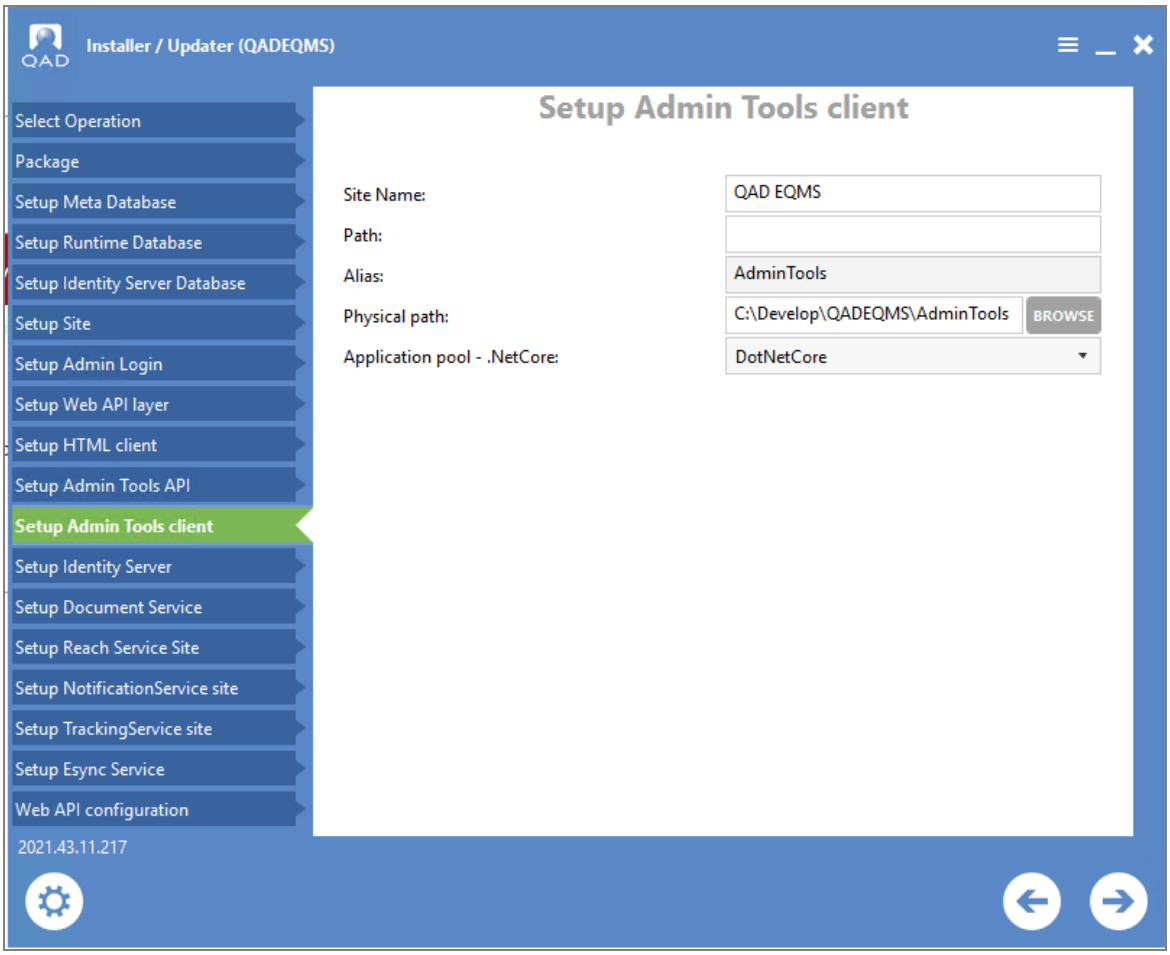
Set Up Admin Tools API

Below is an example of how it should look.



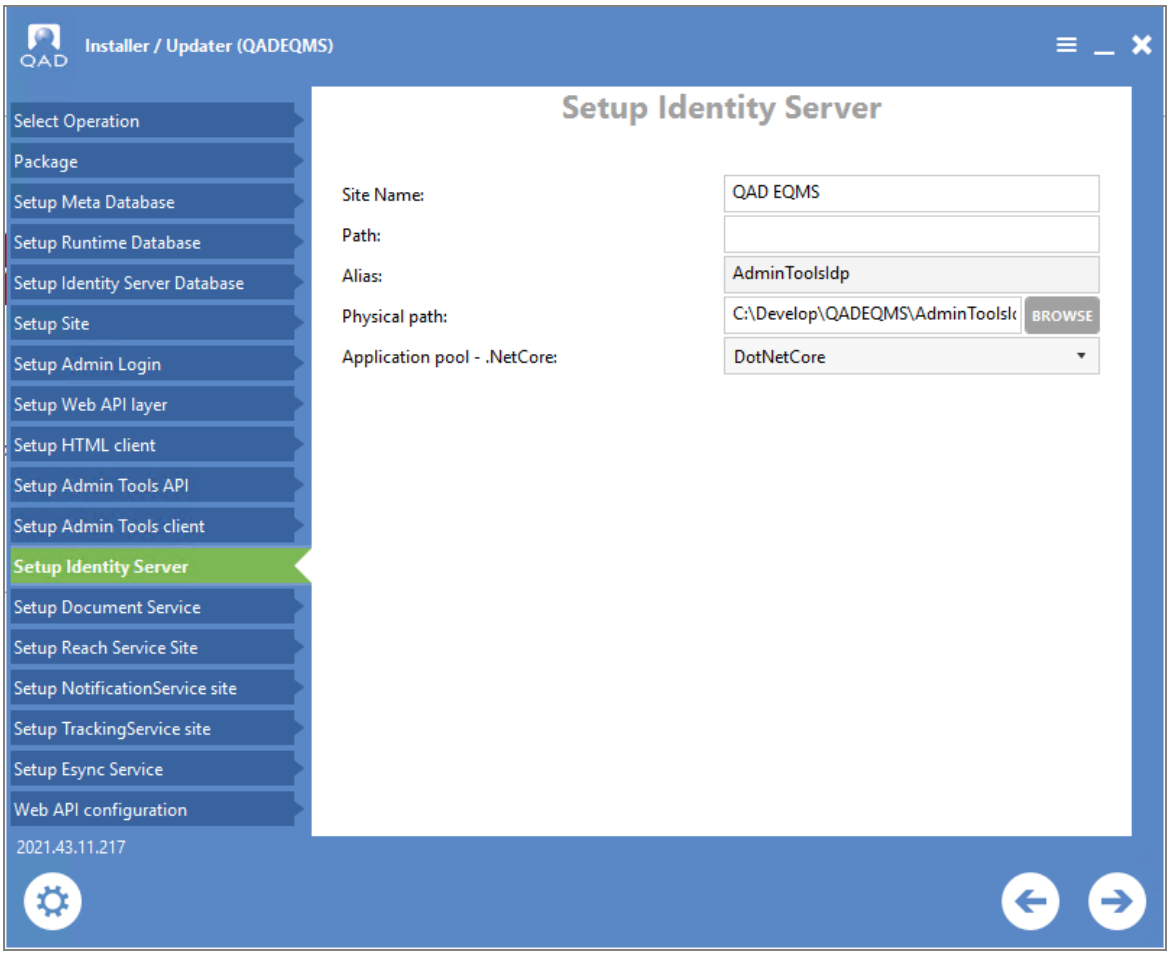
Set Up Admin Tools Client

Below is an example of how it should look.



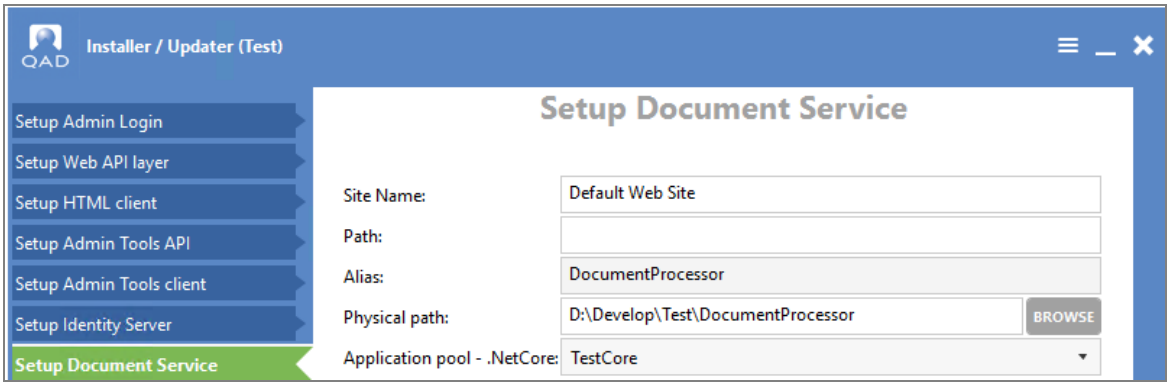
Set Up the Identity Server

Below is an example of how it should look.



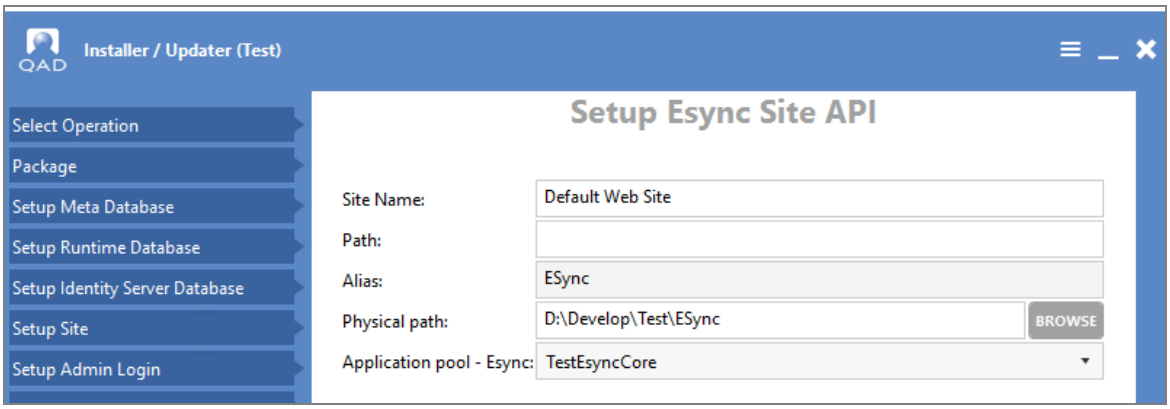
Set Up the Document Service

Below is an example of how it should look.



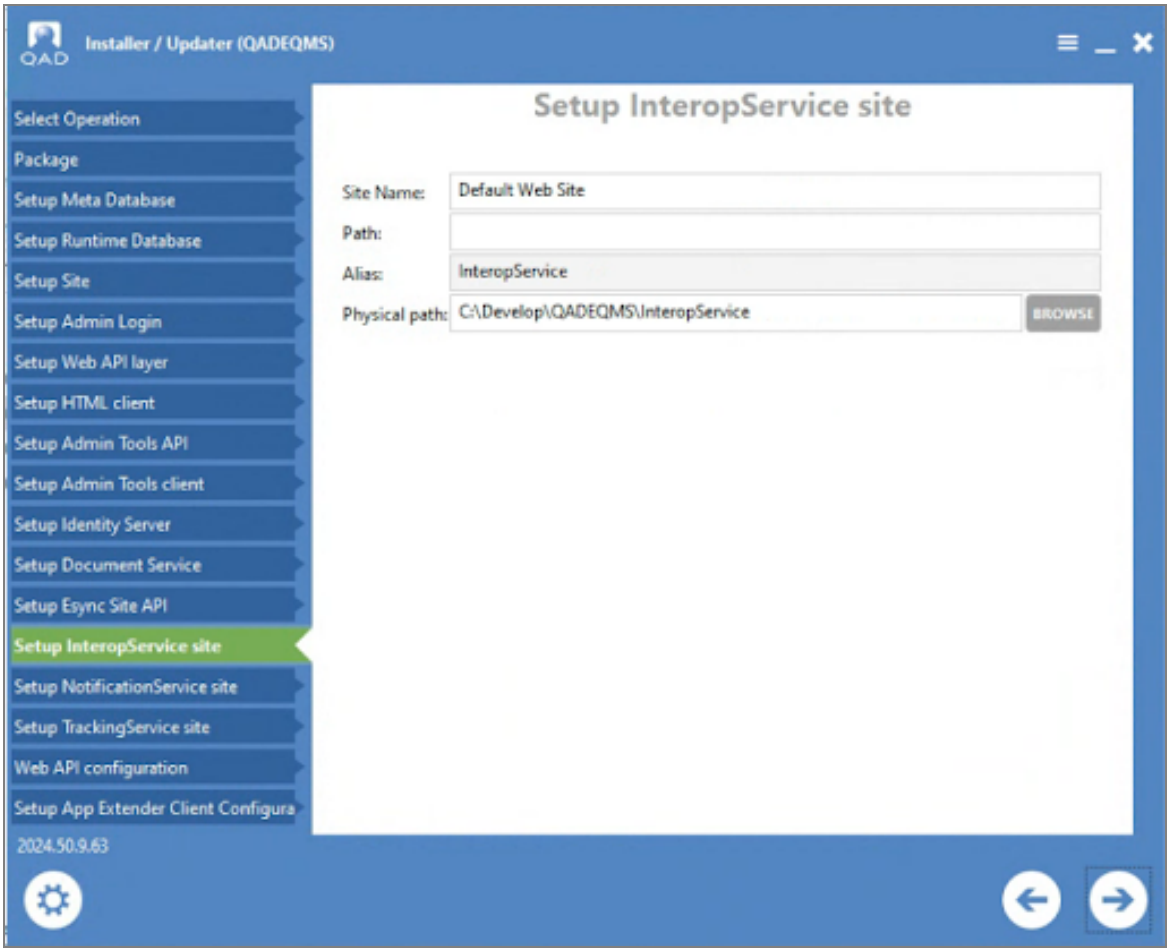
Set Up Esync API

Below is an example of how it should look.



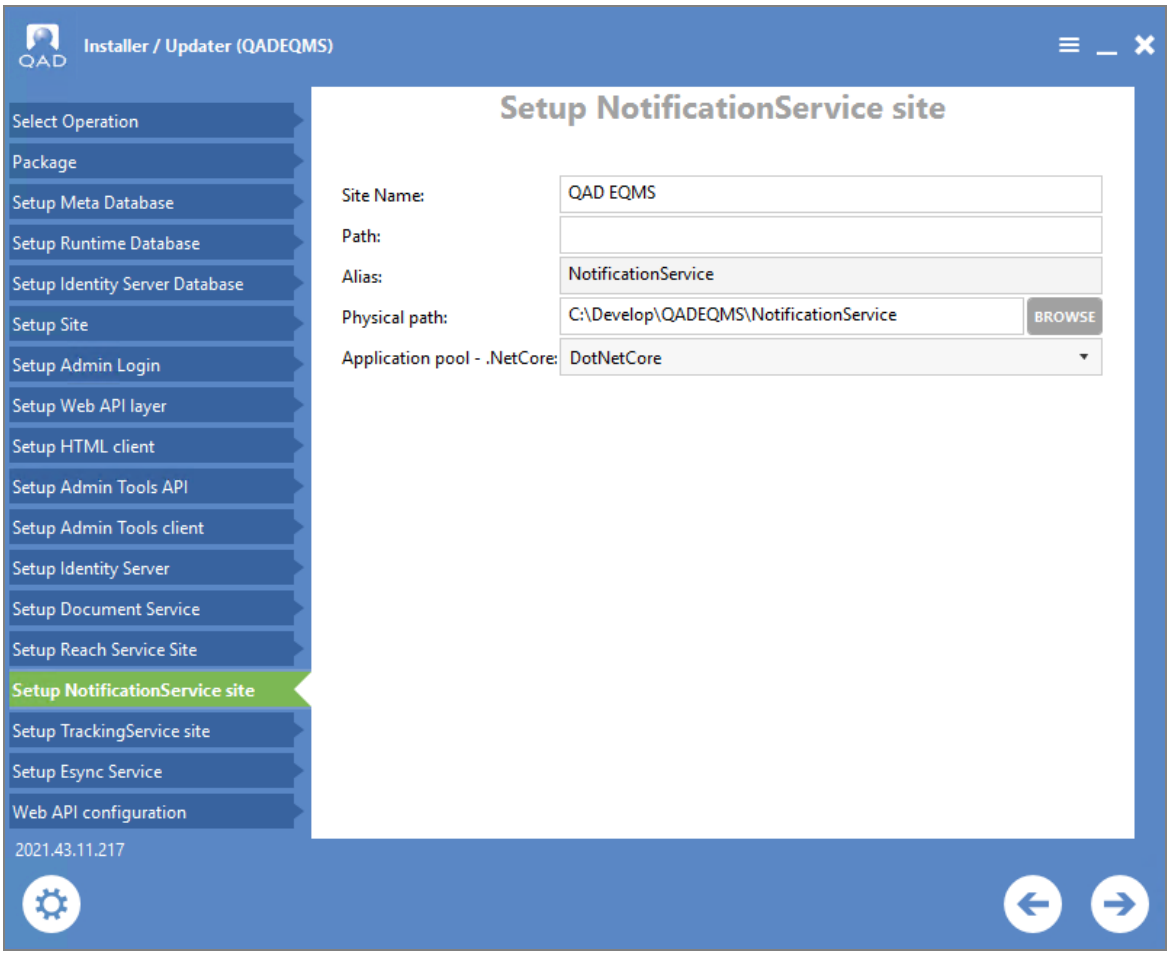
Set Up InteropService Site

Below is an example of how it should look.



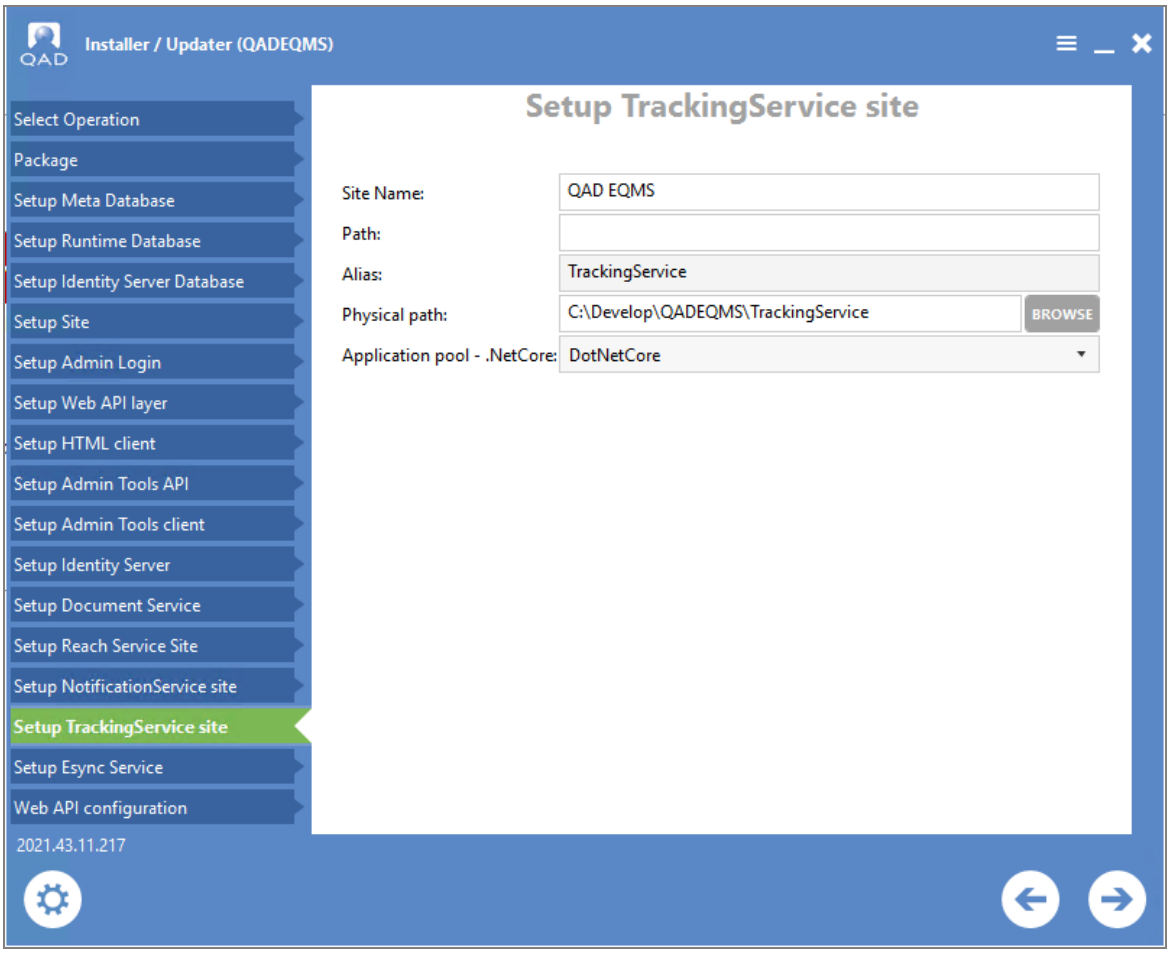
Set Up Notification Service

Below is an example of how it should look.



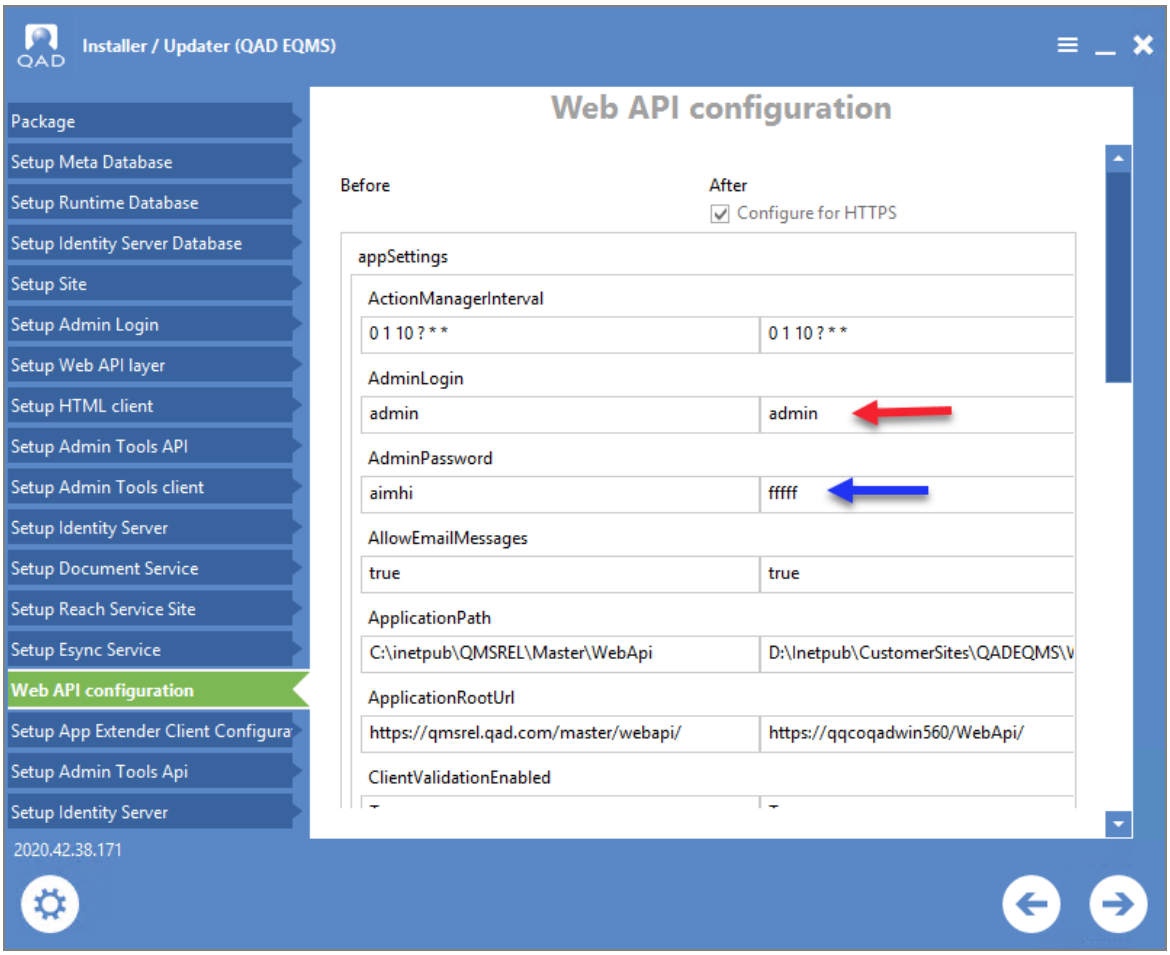
Set Up Tracking Service

Below is an example of how it should look.



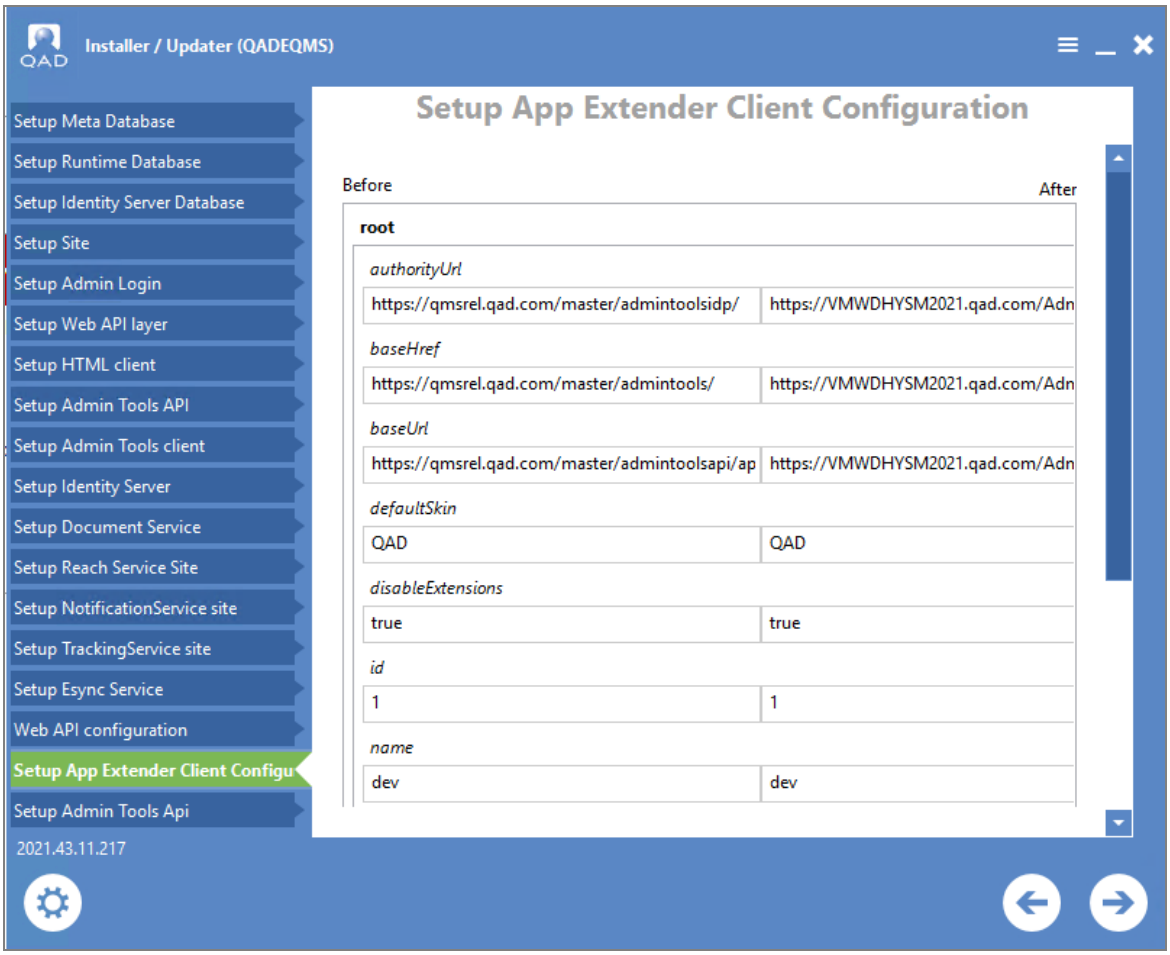
Web API Configuration

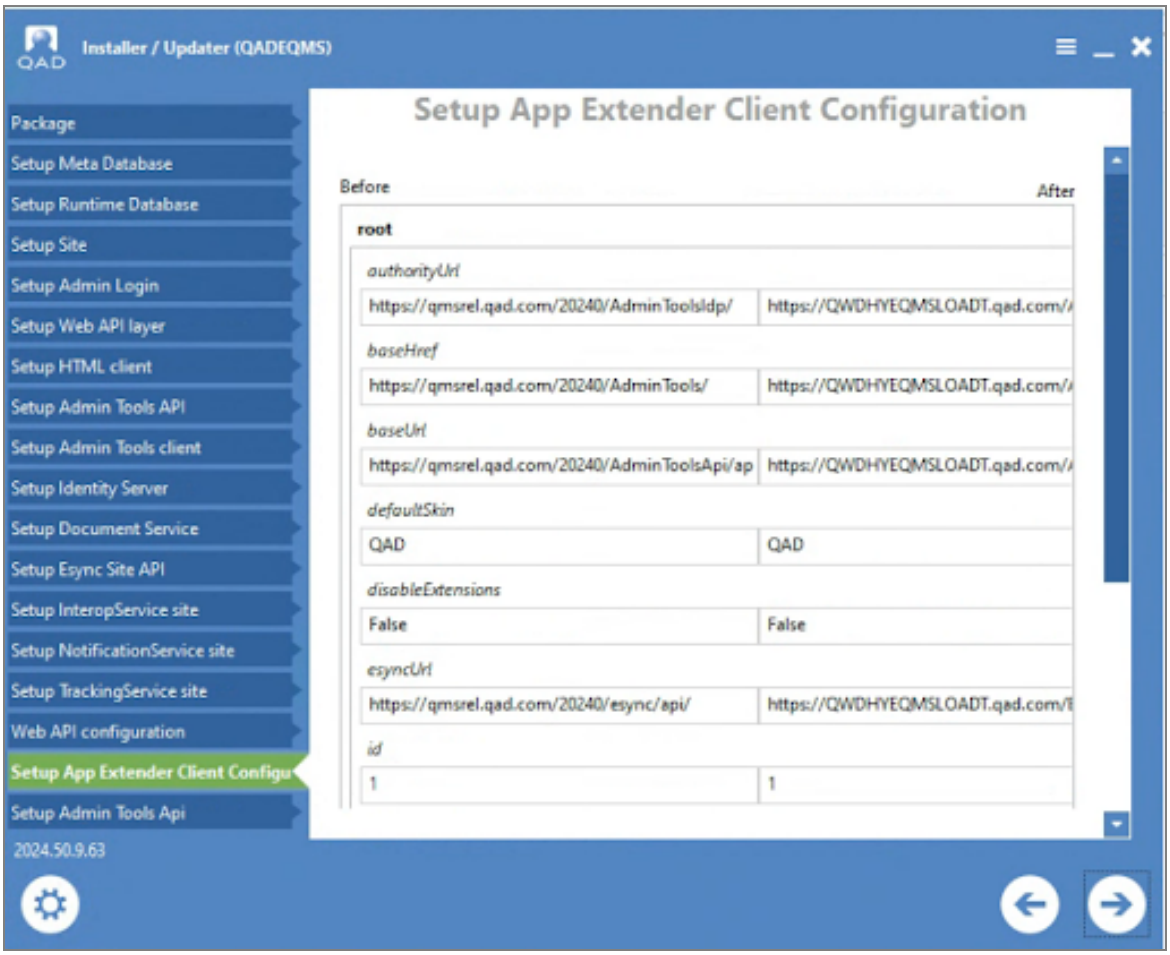
The admin information is read-only, but should reflect the password used in "Creating the Admin Password" on page 23 (red and blue arrows).



Set Up App Extender Client Configuration

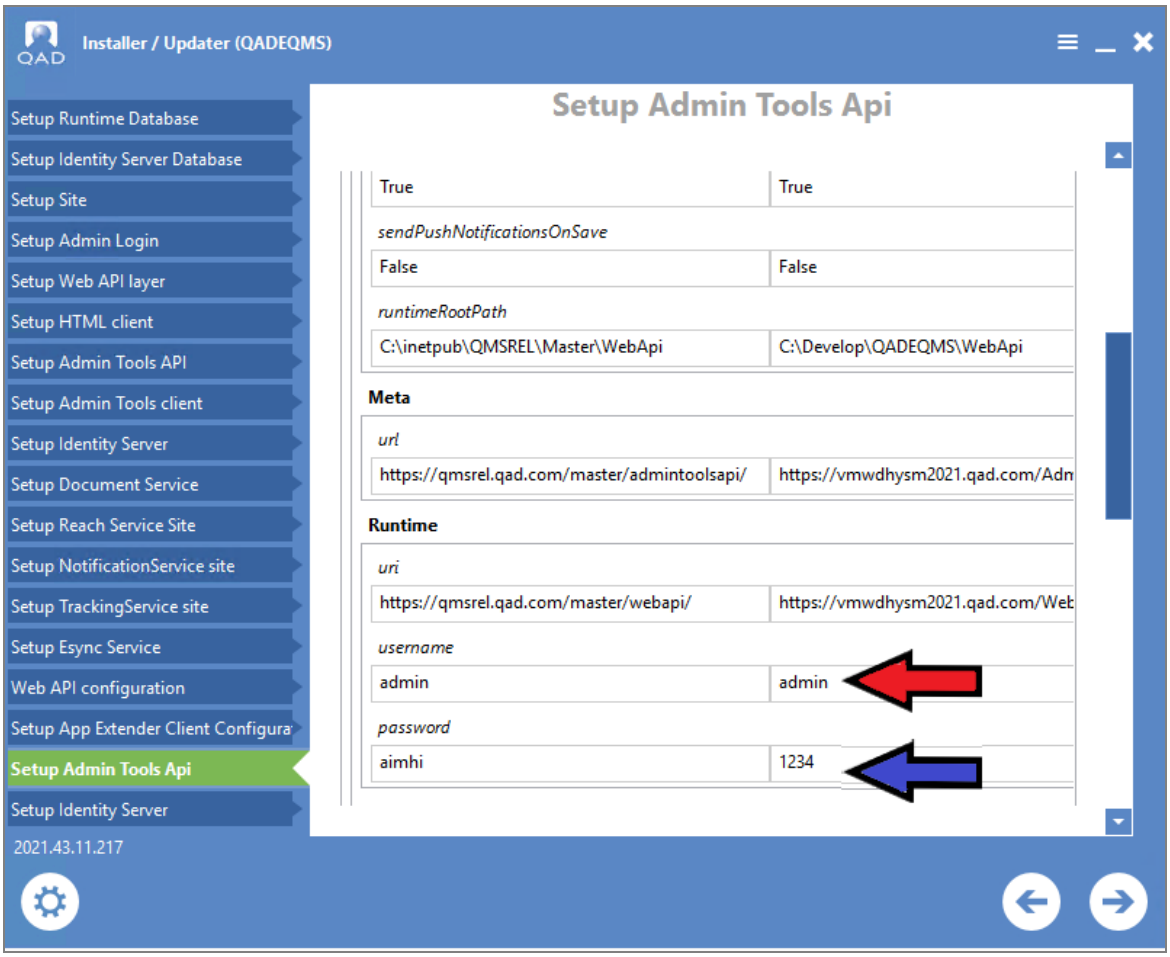
Nothing should need to be changed here. Below is an example of how it should look.


Installer / Updater (QADEQMS)
Setup Meta Database
Setup Runtime Database
Setup Identity Server Database
Setup Site
Setup Admin Login
Setup Web API layer
Setup HTML client
Setup Admin Tools API
Setup Admin Tools client
Setup Identity Server
Setup Document Service
Setup Reach Service Site
Setup NotificationService site
Setup TrackingService site
Setup Esync Service
Web API configuration
Setup App Extender Client Configu
Setup Admin Tools Api
2021.43.11.217
Setup App Extender Client Configuration
Before
After
root
authorityUrl
https://qmsrel.qad.com/master/admintoolsidp/
https://VMWDHYSM2021.qad.com/Adn
baseHref
https://qmsrel.qad.com/master/admintools/
https://VMWDHYSM2021.qad.com/Adn
baseUrl
https://qmsrel.qad.com/master/admintoolsapi/ap
https://VMWDHYSM2021.qad.com/Adn
defaultSkin
QAD
QAD
disableExtensions
true
true
id
1
1
name
dev
dev



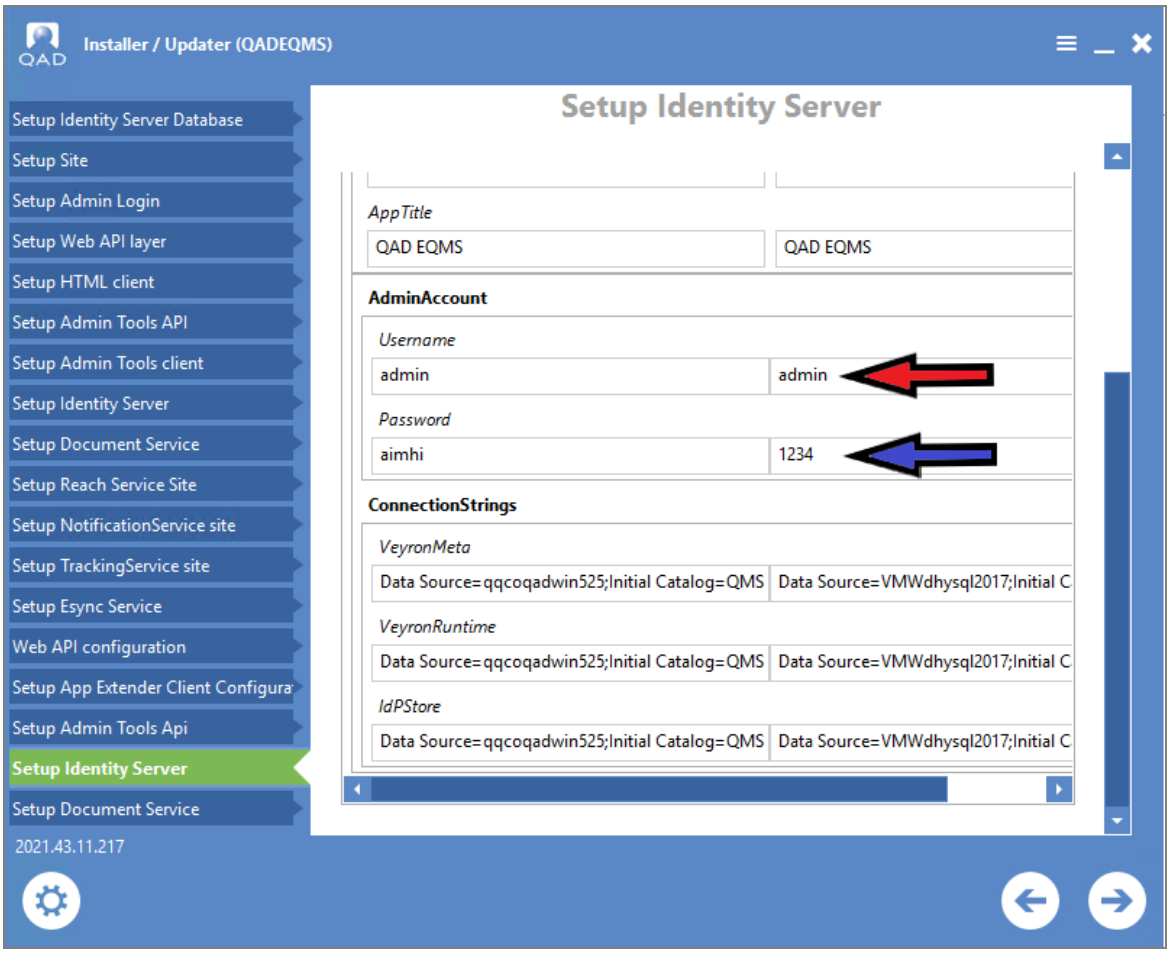
Set Up Admin Tools Api

The admin information is read-only, but should reflect the password used in "Creating the Admin Password" on page 23 (red and blue arrows).



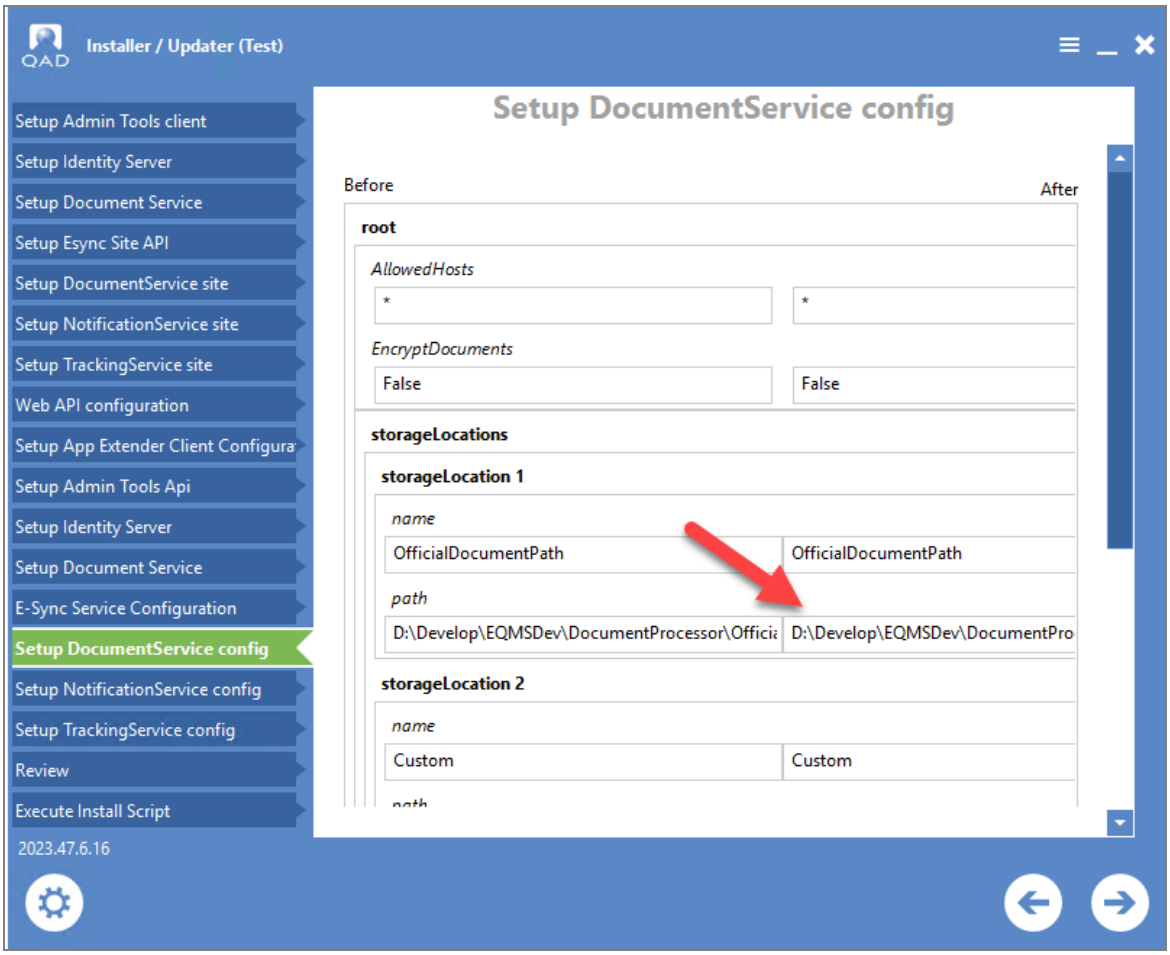
Set Up Identity Server

The admin information is read-only, but should reflect the password used in "Creating the Admin Password" on page 23 (red and blue arrows).



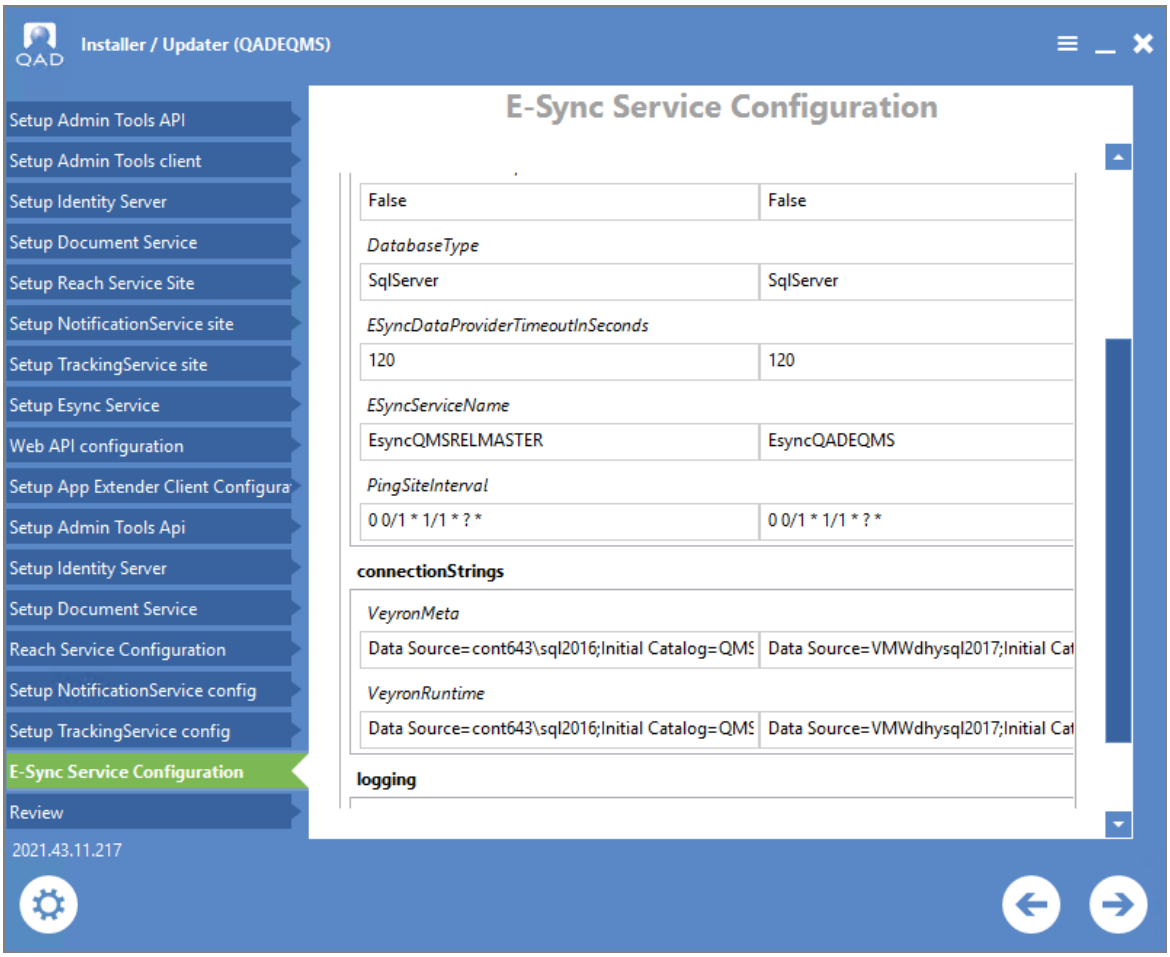
Set Up Document Service (File Storage Path)

You can set where the Document File Storage will be (red arrow) here. Reminder: If Document storage will be on a server other than the Web Server, make sure the accounts running the Application Pool have access to the path.



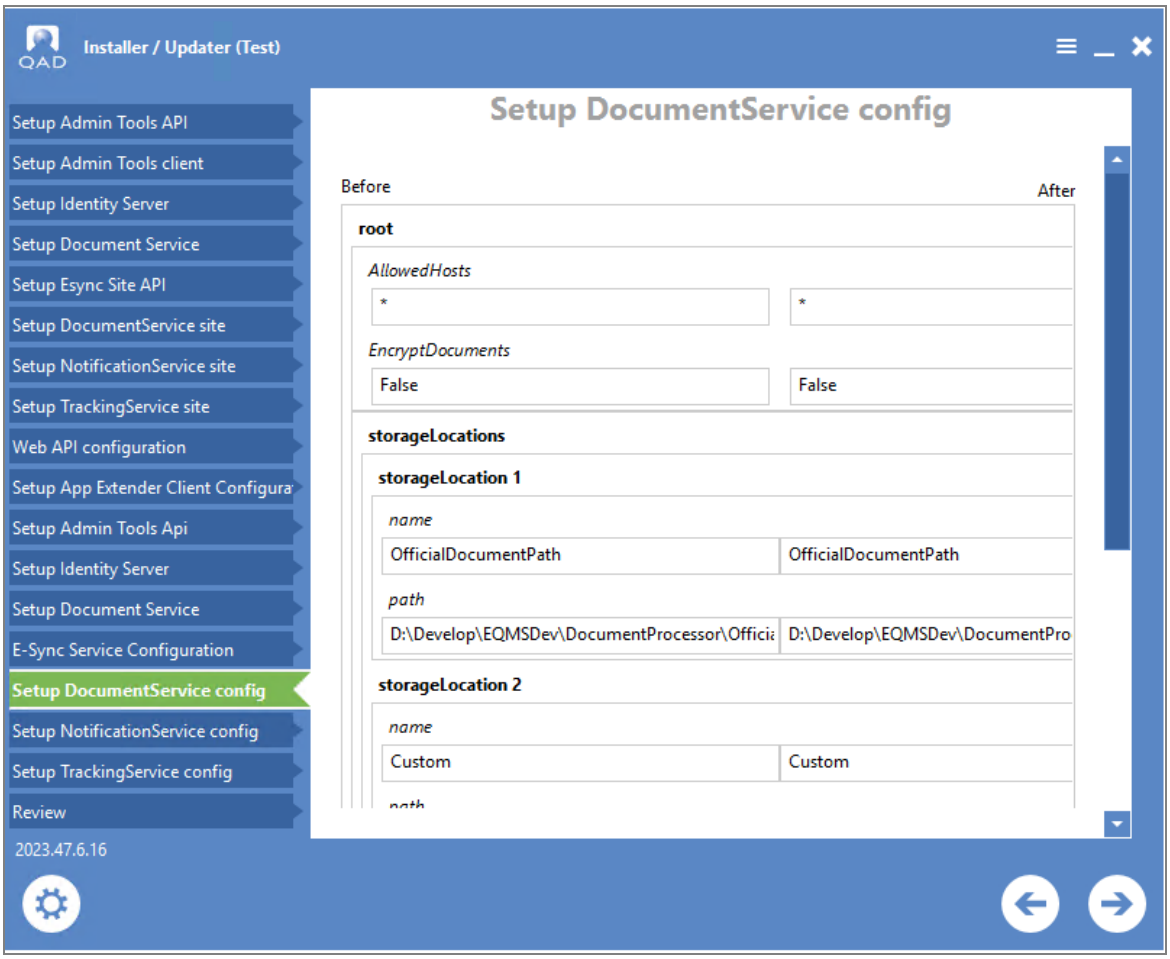
Esync Service Configuration.

Below is an example of how this should look.



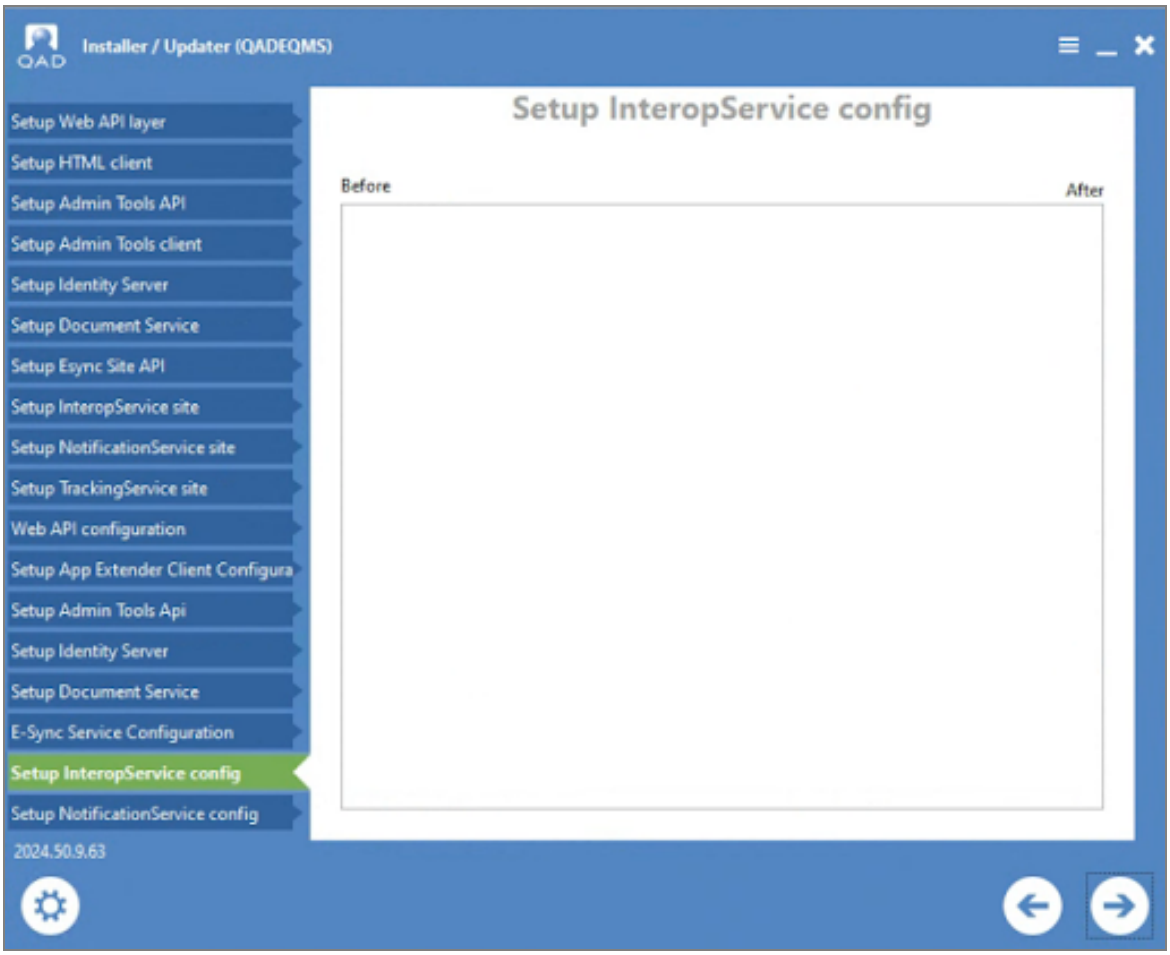
Set Up DocumentService Configuration

Below is an example of how this should look.



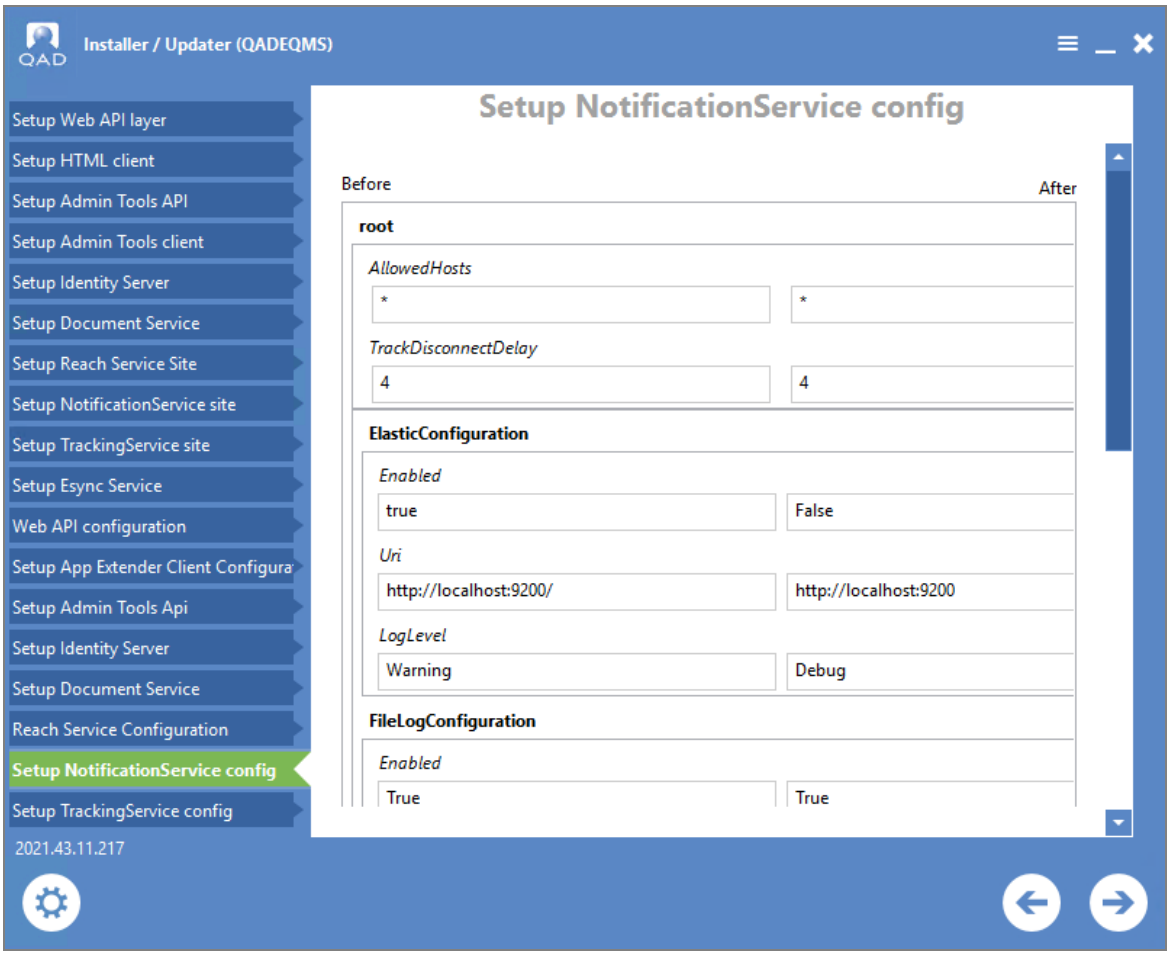
Set Up InteropService Configuration

Note that this is intentionally blank.



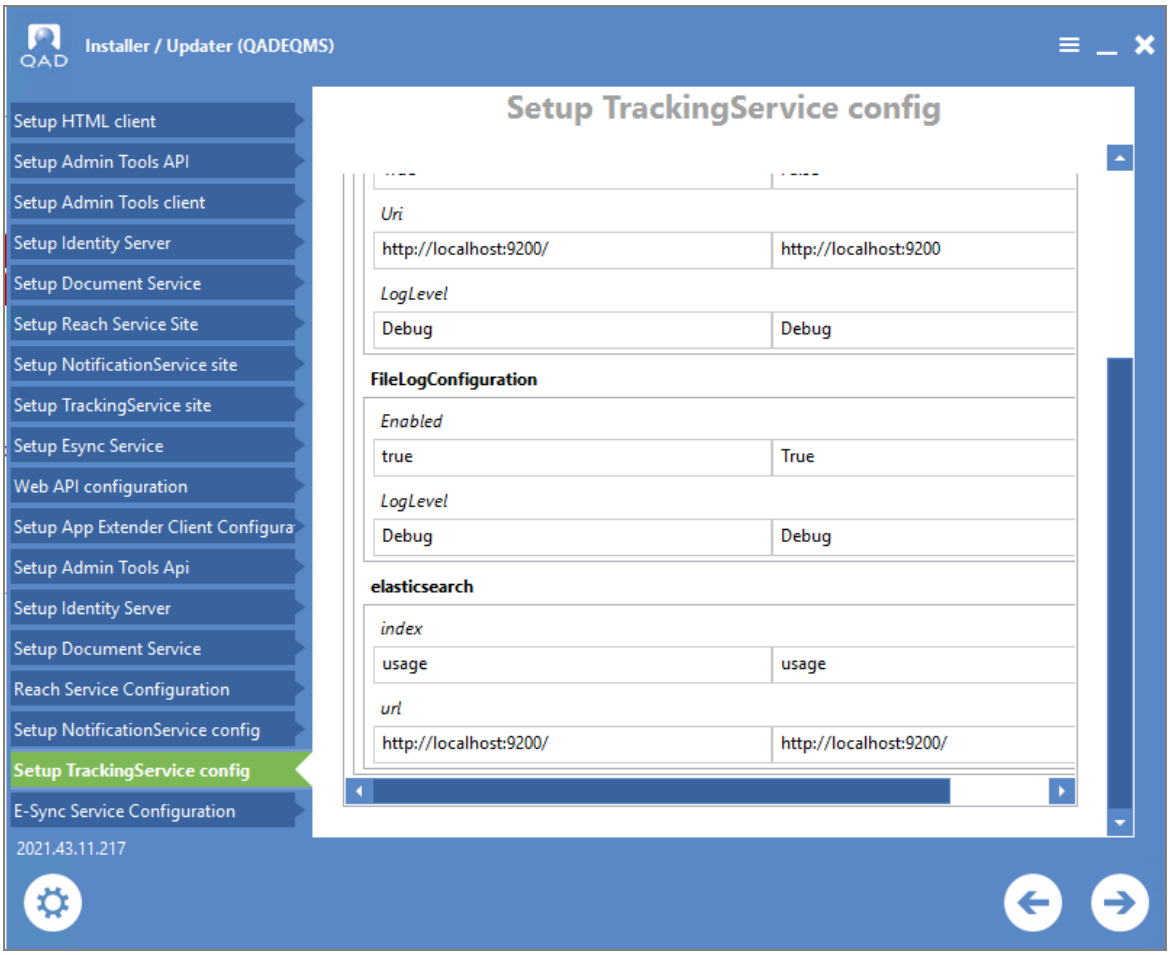
Set Up Notification Service Configuration

Below is an example of how this should look. Note that the URI's here should be localhost:9200.



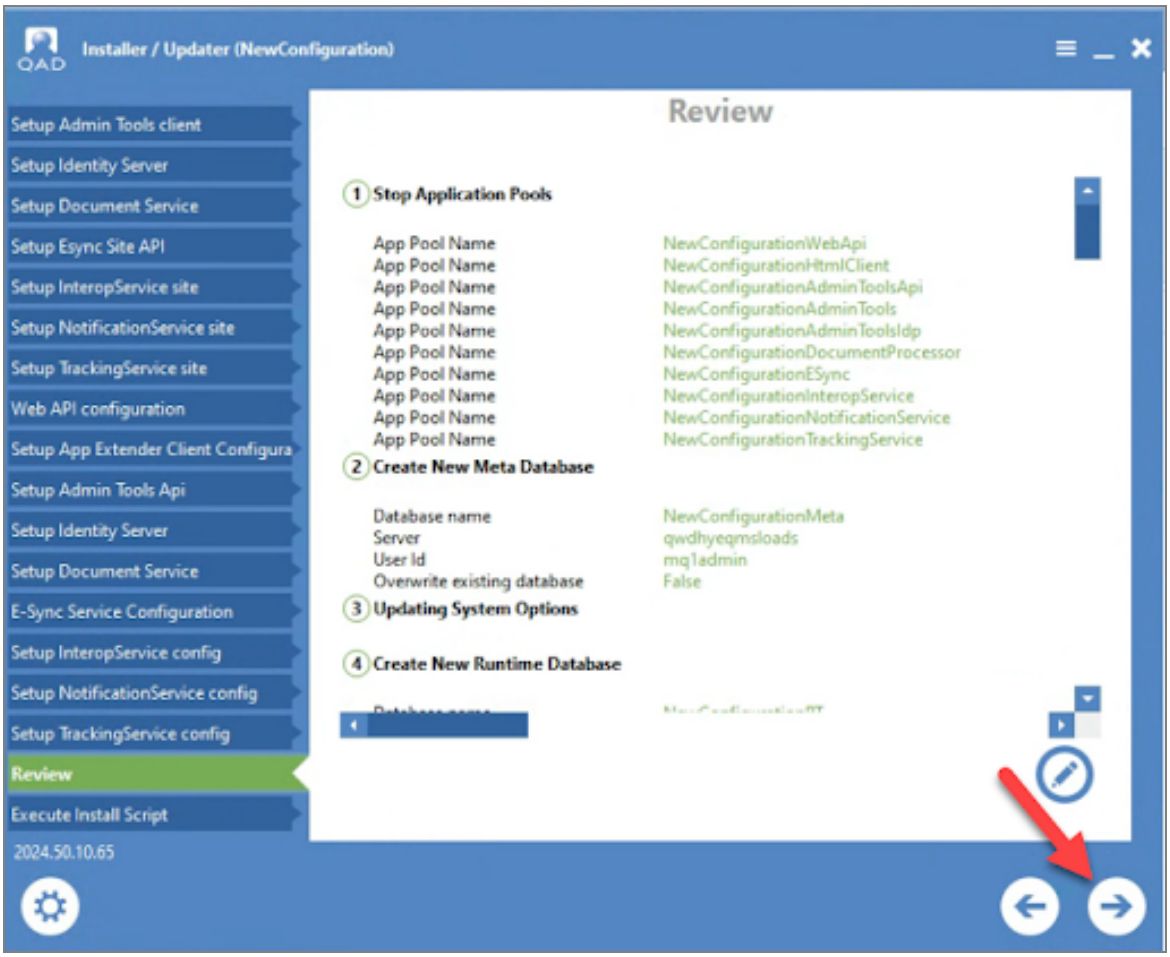
Set Up Tracking Service Configuration

Below is an example of how this should look. Note that the URI's here should be localhost:9200.



Review

You can review all the settings from above on this page. Click the Next arrow (red arrow) at the bottom to begin the installation.


Installer / Updater (NewConfiguration)
Setup Admin Tools client
Setup Identity Server
Setup Document Service
Setup Esync Site API
Setup InteropService site
Setup NotificationService site
Setup TrackingService site
Web API configuration
Setup App Extender Client Configura
Setup Admin Tools Api
Setup Identity Server
Setup Document Service
E-Sync Service Configuration
Setup InteropService config
Setup NotificationService config
Setup TrackingService config
Review
Execute Install Script
2024.50.10.65
Review
1 Stop Application Pools
App Pool Name NewConfigurationWebApi
App Pool Name NewConfigurationHtmlClient
App Pool Name NewConfigurationAdminToolsApi
App Pool Name NewConfigurationAdminTools
App Pool Name NewConfigurationAdminToolsIdp
App Pool Name NewConfigurationDocumentProcessor
App Pool Name NewConfigurationESync
App Pool Name NewConfigurationInteropService
App Pool Name NewConfigurationNotificationService
App Pool Name NewConfigurationTrackingService
2 Create New Meta Database
Database name NewConfigurationMeta
Server qwdhyeqmsloads
User Id mq1admin
Overwrite existing database False
3 Updating System Options
4 Create New Runtime Database

Chapter 4

Setting Up Email and LDAP

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Setup LDAP...45

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Apply Food and Beverage Strings...48

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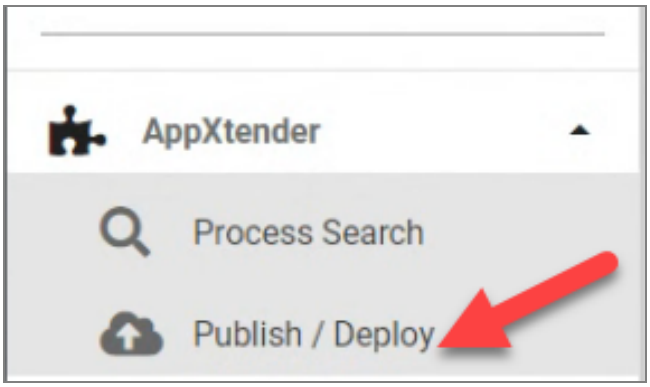
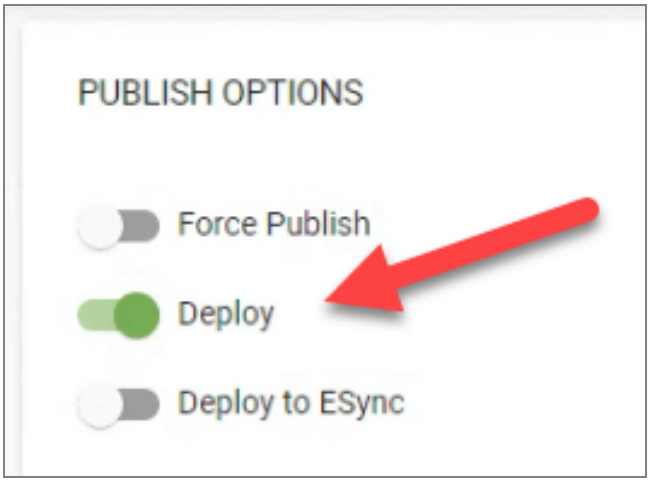
Setup Email and LDAP

The below instructions will provide a brief overview of where to input email server information and where to enter LDAP (if applicable) information.

Setup Email

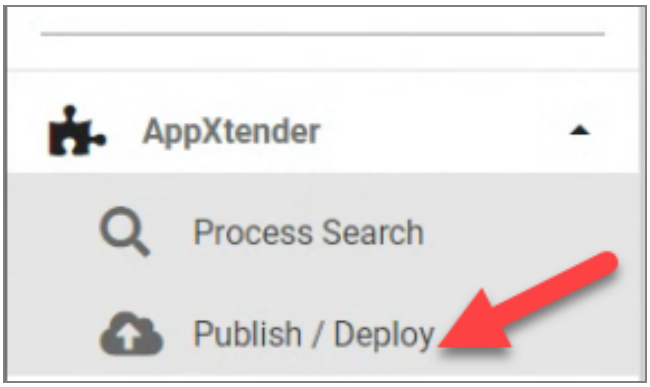
1. Log in to the Admintools site. The URL will look something like https://your.qmssite.com/Admintools
2. Expand the System Setup group from the navigation on the left and open the Email Setup screen.
3. Enter information into all applicable fields and click Save.
4. Use the Test Connection button to validate an email is being sent from the Application.
5. Publish the site using the Deploy option.

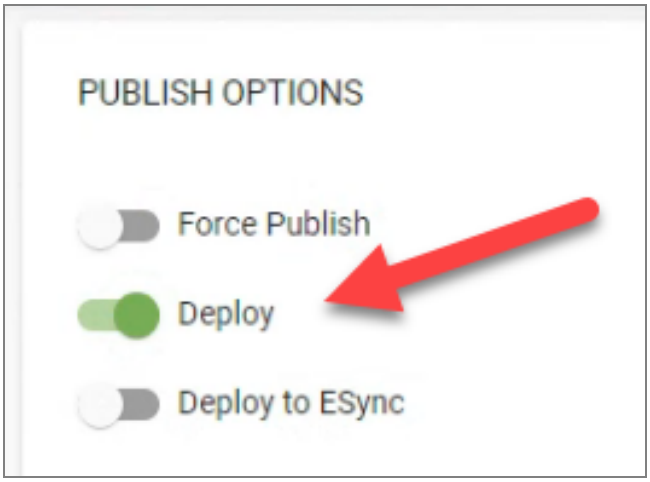
a. 

b. 

Setup LDAP

1. Log in to the Admintools site. The URL will look something like https://your.qmssite.com/Admintools
2. Expand the System Setup group from the navigation on the left and open the LDAP Setup screen.
3. Enter information into all applicable fields and click Save.

4. Publish the site using the Deploy option.
   a. 

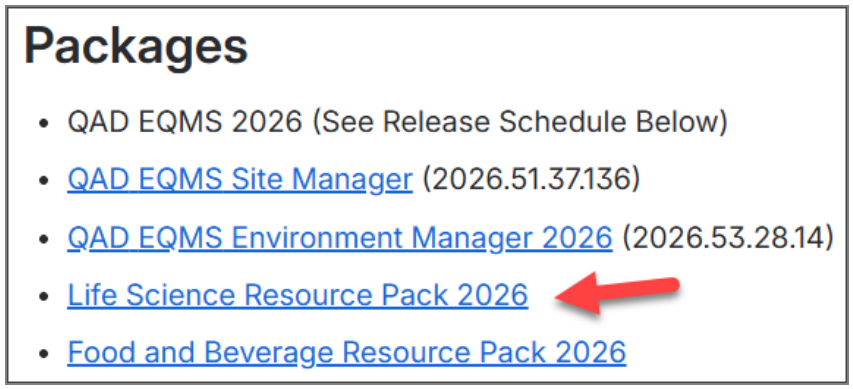
   b. 

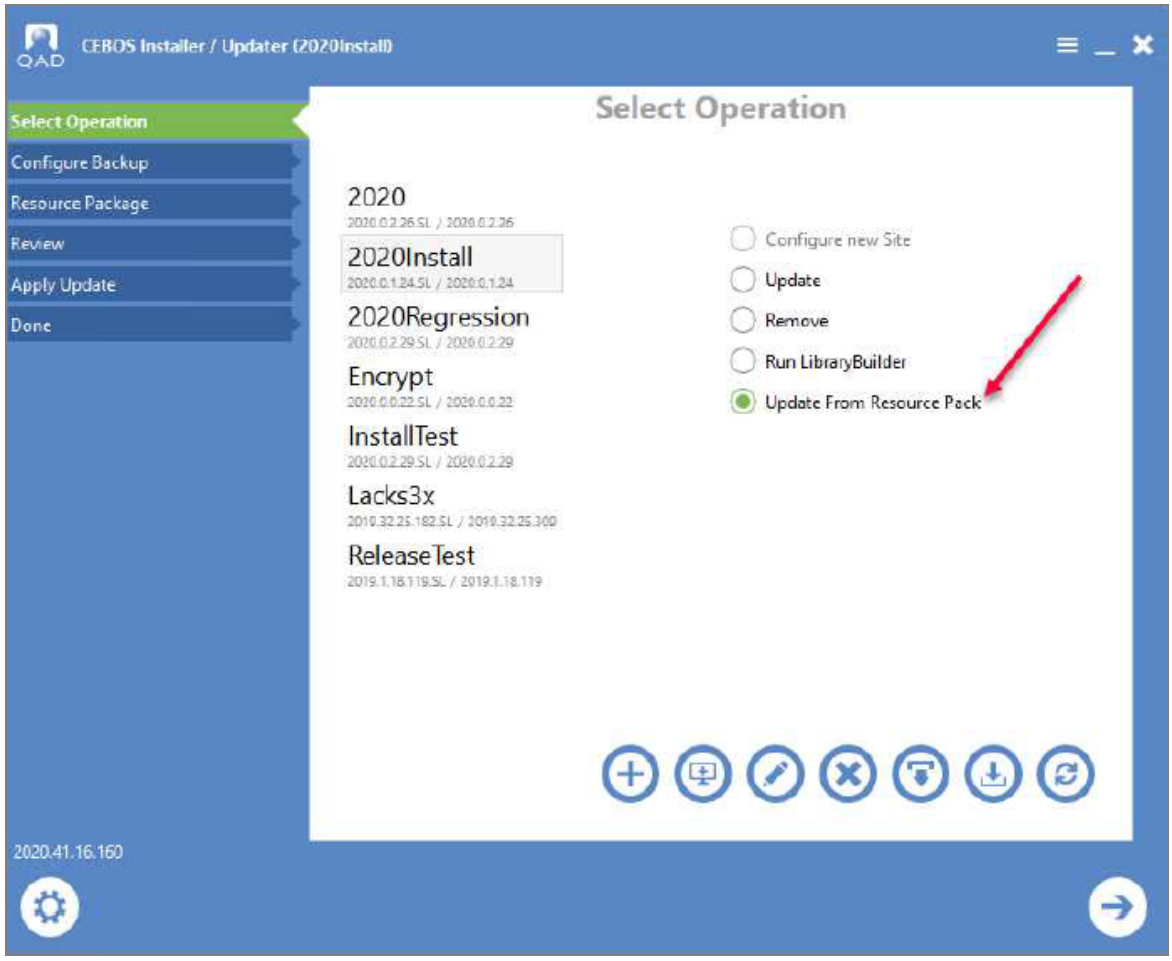
Setup Supplier Account Creation Setup

1. Log in to the end user site using an administrator account. The URL will look something like https://your.qmssite.com/.
2. Expand the Administration group from the navigation on the left and open the Supplier Account Creation Setup screen.
3. Double-click "Click Here to Edit Setup".
4. Enter information into all fields:
   a. Enter your company name.
   b. Enter the QMS URL. This is the same URL used in step 1 above.
5. Click Save.

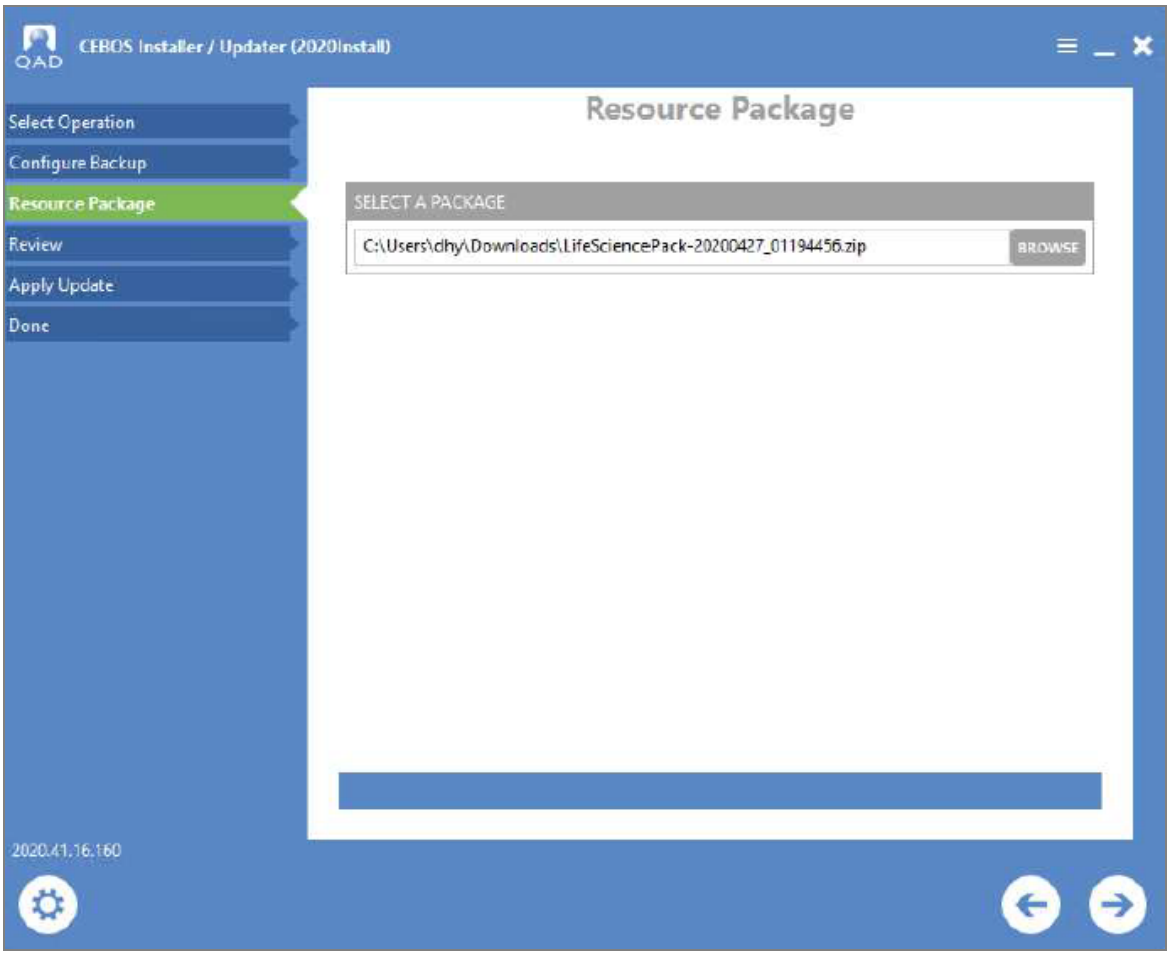
Apply Life Science Strings

If the customer is a Life Science customer and it is required to apply Life Science strings, follow the instructions below. If there is a question as to whether or not this step should be executed, please see the Consultant on the project.

1. Go to QAD EQMS 2026 and download the Life Science Resource pack.
   a. 

2. Open Site Manager and select the Update From Resource Pack operation.
   a. 

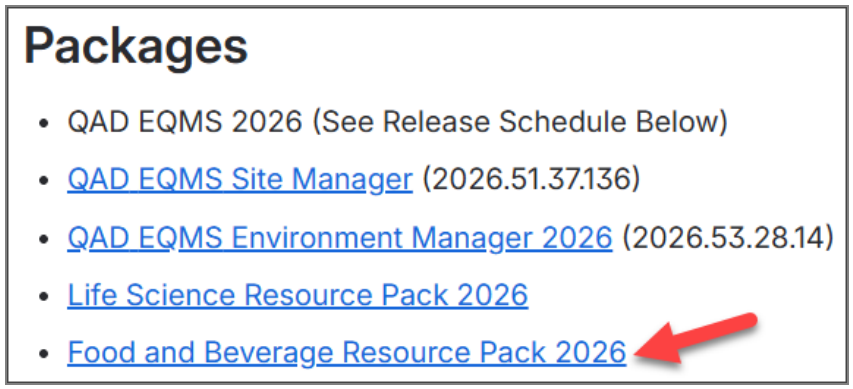
3. On the Configure Backup page, leave the skip DB check box deselected so backups are taken.
4. On the Resource Package page, browse to the location where the resource file (.zip) is located. Load the package.

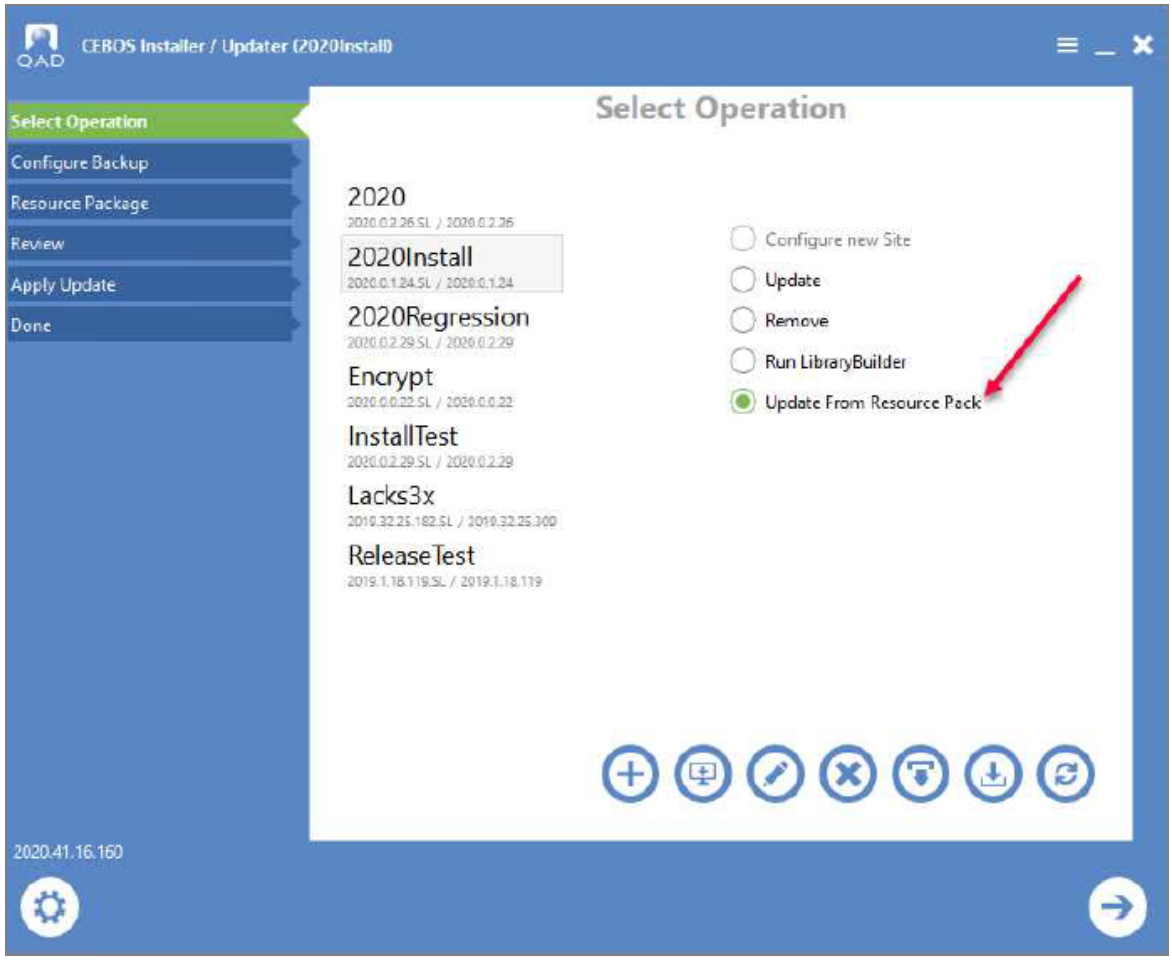
a. 

5. Click the next arrow on the review page and begin loading the Life Science Strings.
6. Once the operation is complete, log in to the Runtime Site and validate some of the strings. See the examples below.
    a. APQP is now Design Control.
    b. Process FMEA is now Process Risk Plan.

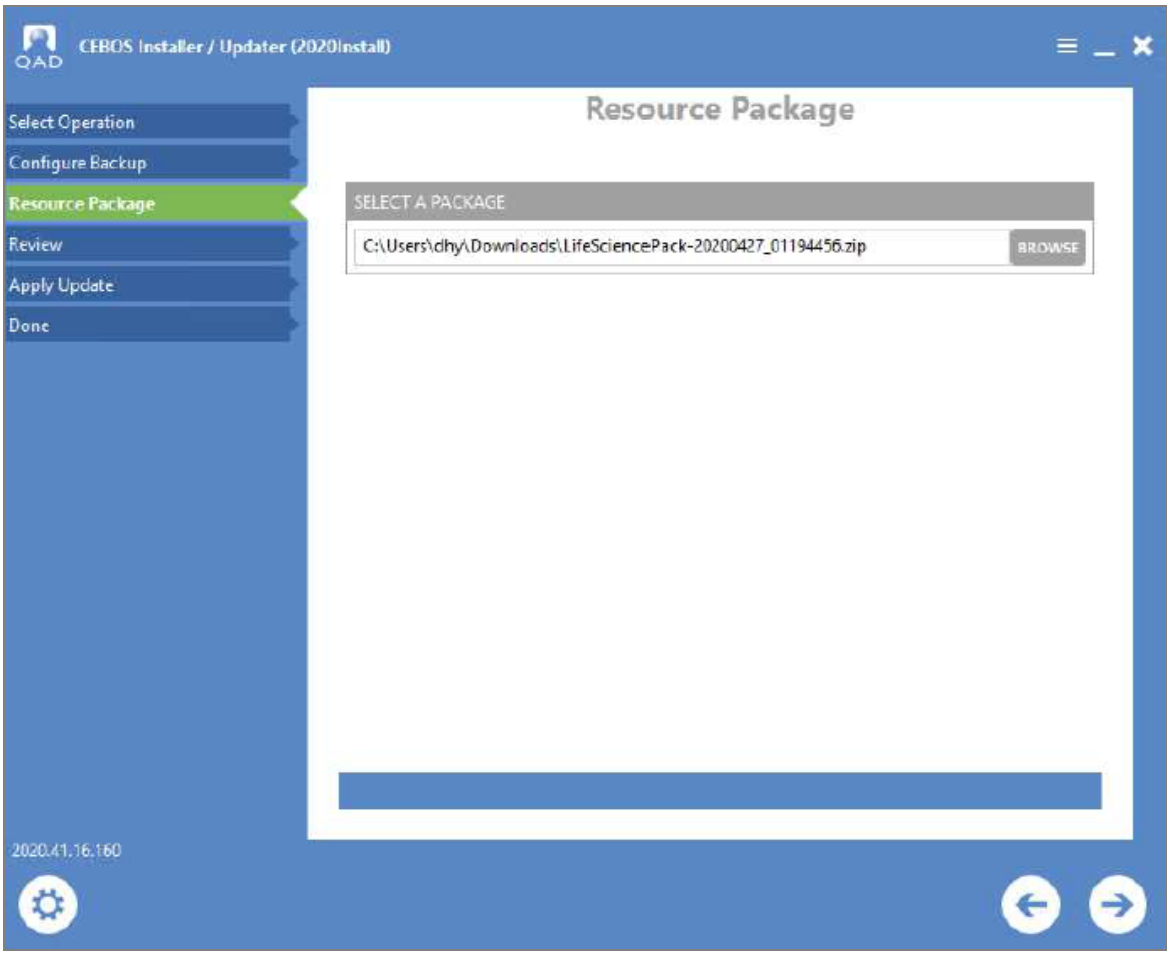
Apply Food and Beverage Strings

If the customer is a Food and Beverage customer and it is required to apply Food and Beverage strings, follow the instructions below. If there is a question as to whether or not this step should be executed, please see the Consultant on the project.

1. Go to QAD EQMS 2026 and download the Food and Beverage Resource pack.
   a. 

2. Open Site Manager and select the Update From Resource Pack operation.
   a. 

3. On the Configure Backup page, leave the skip DB check box deselected so backups are taken.
4. On the Resource Package page, browse to the location where the resource file (.zip) is located. Load the package.

a. 

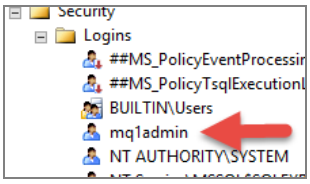
5. Click the next arrow on the review page and begin loading the Food and Beverage Strings.
6. Once the operation is complete, log in to the Runtime Site and validate some of the strings. See the examples below.
    a. APQP is now Design Control.
    b. Process FMEA is now Process Risk Plan.

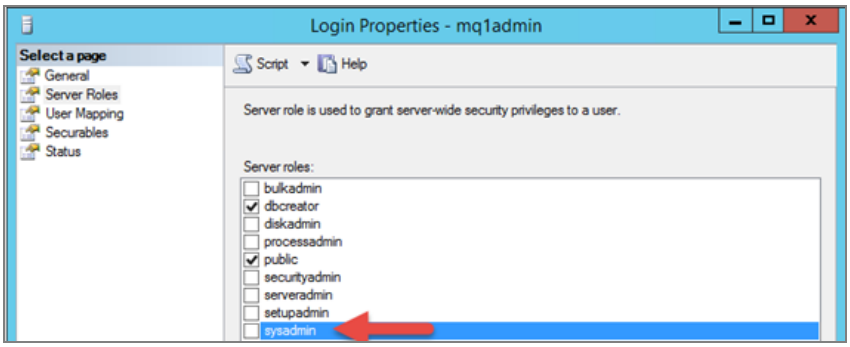
Update the SQL Login

For Cloud installations, the SQL Login must be updated to remove certain permissions. The below instructions should only be executed if your policy prohibits third party applications from using a SQL login with sysadmin rights.

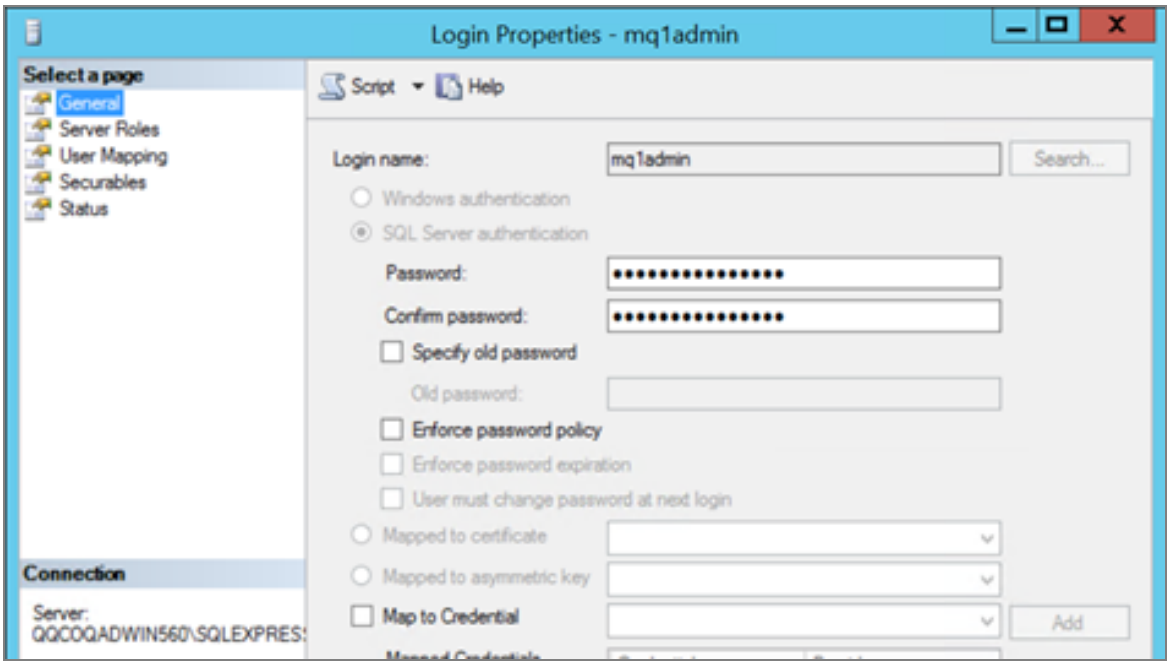
1. On the SQL Server, log in to SQL Management Studio using a SysAdmin account (e.g. sa or windows account).

2. Expand the Security folder in SQL Server Management Studio and locate the SQL login.
   a.

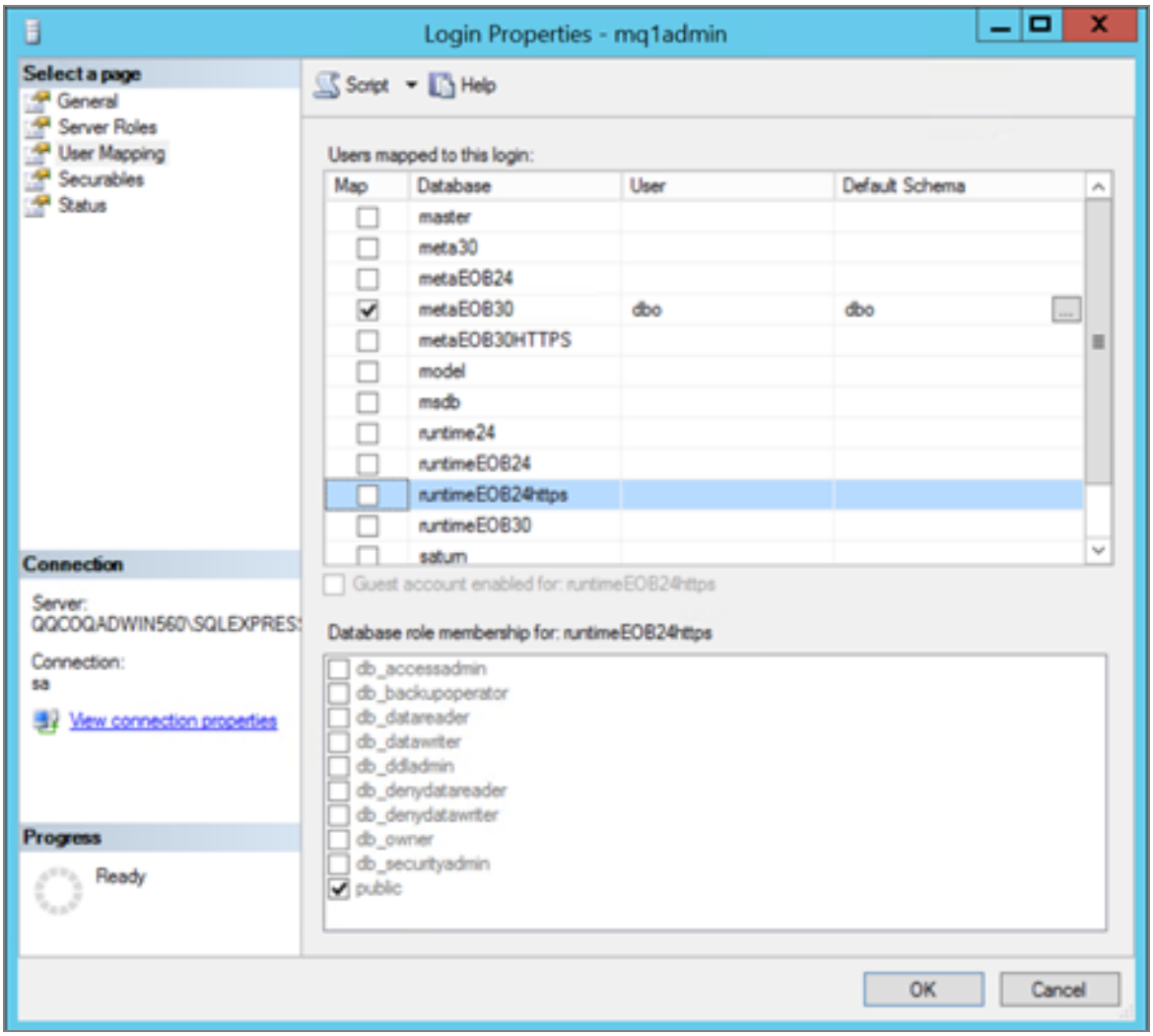
   b. 

3. Open the login by double clicking, click Server roles, and remove the checkmark from the sysadmin checkbox.
   a. 

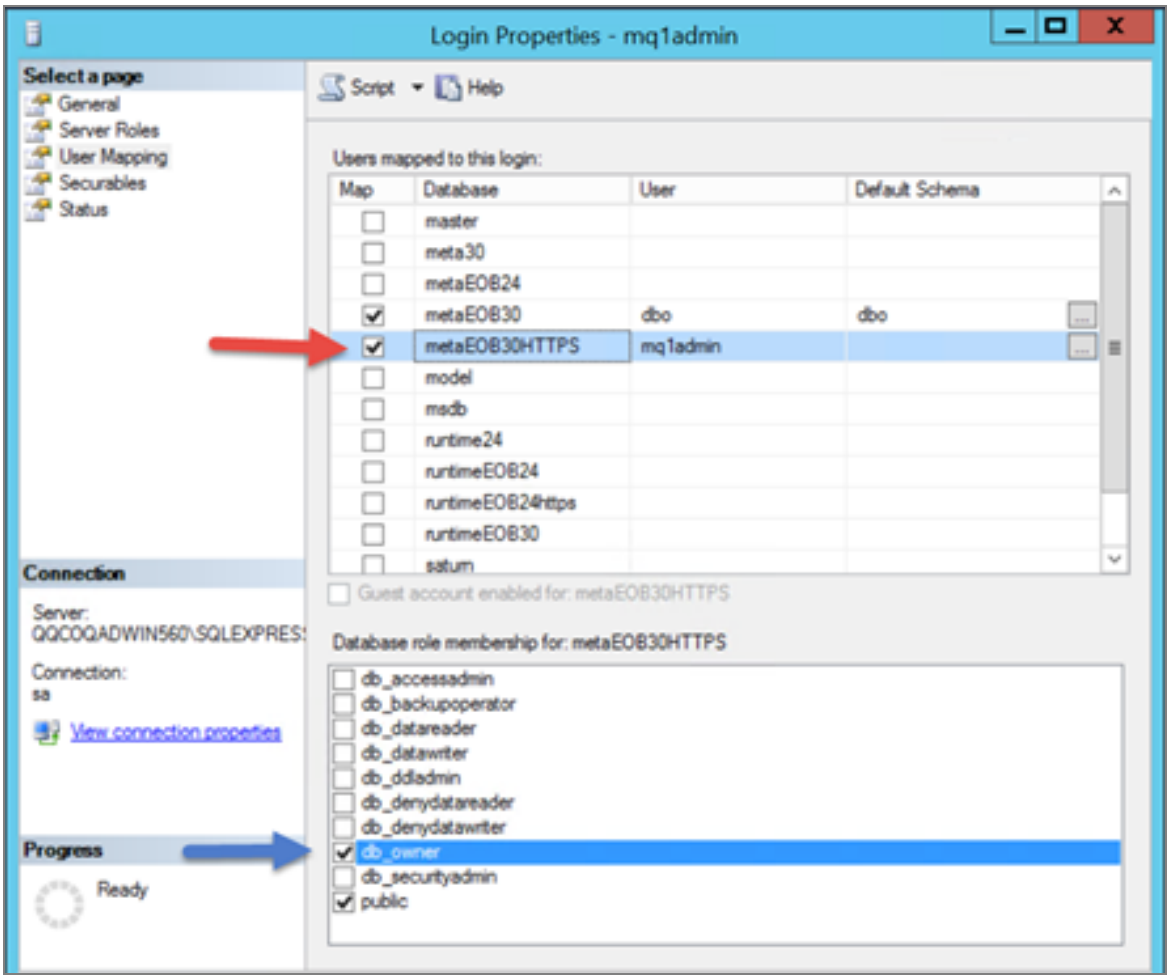
4. Add SQL login as DBOwner of Meta, Runtime, and IDP Databases.
   a. Double-click the SQL login to bring up the Login properties.
   b. Click User Mapping.
   c. Select the check box next to the Meta, Runtime, and IDP databases and select db_ owner for each database.

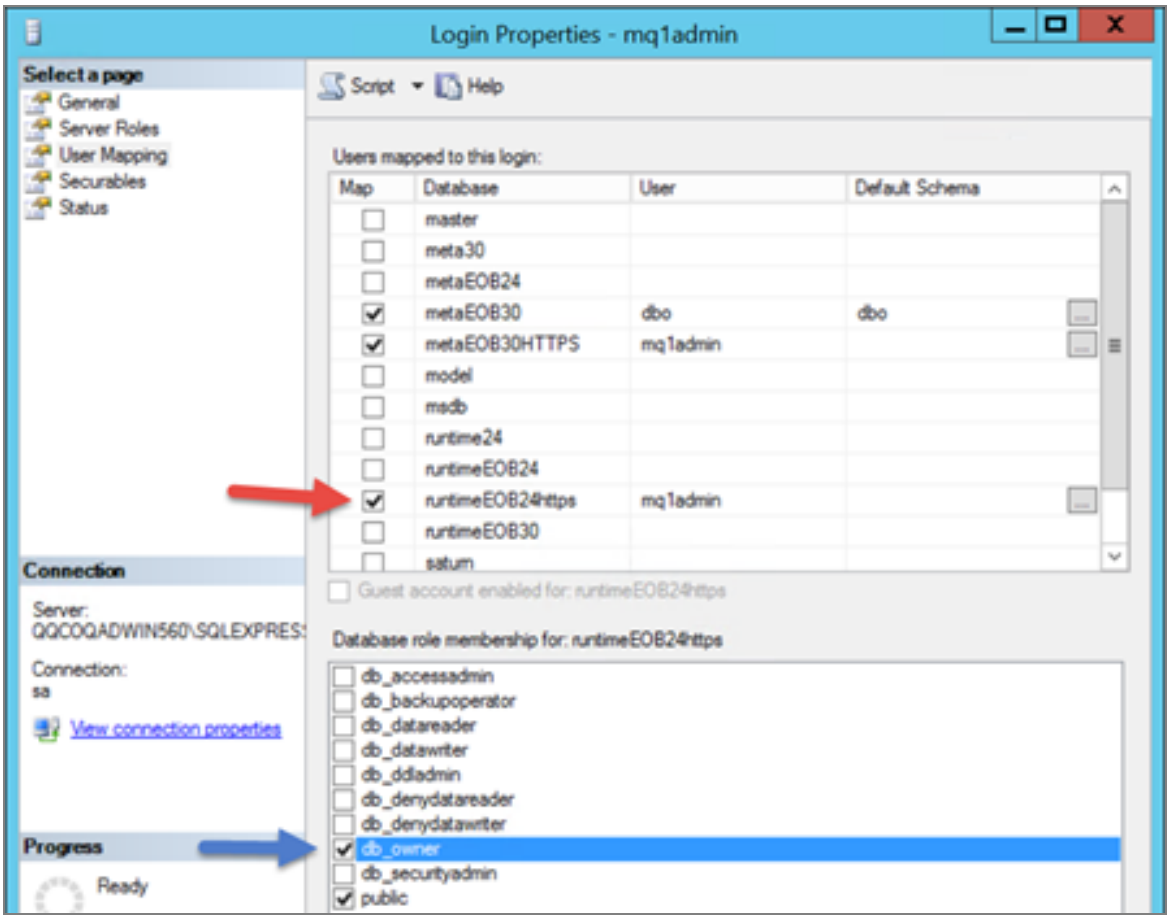
i. 
Login Properties - mq1admin
Select a page
General
Server Roles
User Mapping
Securables
Status
Script
Help
Login name:
mq1admin
Search...
Windows authentication
SQL Server authentication
Password:
Confirm password:
Specify old password
Old password:
Enforce password policy
Enforce password expiration
User must change password at next login
Mapped to certificate
Mapped to asymmetric key
Map to Credential
Add
Connection
Server:
QQCOQADWIN560\SQLEXPRES

ii.


Login Properties - mq1admin
Select a page
General
Server Roles
User Mapping
Securables
Status
Script
Help
Users mapped to this login:
Map
Database
User
Default Schema
master
meta30
metaEOB24
metaEOB30
dbo
dbo
metaEOB30HTTPS
model
msdb
runtime24
runtimeEOB24
runtimeEOB24https
runtimeEOB30
satum
Guest account enabled for: runtimeEOB24https
Database role membership for: runtimeEOB24https
db_accessadmin
db_backupoperator
db_datareader
db_datawriter
db_ddladmin
db_denydatareader
db_denydatawriter
db_owner
db_securityadmin
public
Connection
Server:
Connection:
sa
View connection properties
Progress
Ready
OK
Cancel

iii.


Login Properties - mq1admin
Select a page
General
Server Roles
User Mapping
Securables
Status
Script
Help
Users mapped to this login:
Map
Database
User
Default Schema
master
meta30
metaEOB24
metaEOB30
dbo
dbo
metaEOB30HTTPS
mq1admin
model
msdb
runtime24
runtimeEOB24
runtimeEOB24https
runtimeEOB30
saturn
Guest account enabled for: metaEOB30HTTPS
Database role membership for: metaEOB30HTTPS
db_accessadmin
db_backupoperator
db_datareader
db_datawriter
db_ddladmin
db_denydatareader
db_denydatawriter
db_owner
db_securityadmin
public
Connection
Server:
QQCOQADWIN560\SQLEXPRES
Connection:
sa
View connection properties
Progress
Ready

iv. 
Login Properties - mq1admin
Select a page
General
Server Roles
User Mapping
Securables
Status
Script
Help
Users mapped to this login:
Map
Database
User
Default Schema
master
meta30
metaEOB24
metaEOB30
dbo
dbo
metaEOB30HTTPS
mq1admin
model
msdb
runtime24
runtimeEOB24
runtimeEOB24https
mq1admin
runtimeEOB30
satum
Guest account enabled for: runtimeEOB24https
Database role membership for: runtimeEOB24https
db_accessadmin
db_backupoperator
db_datareader
db_datawriter
db_ddladmin
db_denydatareader
db_denydatawriter
db_owner
db_securityadmin
public
Connection
Server:
QQCOQADWIN560\SQLEXPRES
Connection:
sa
View connection properties
Progress
Ready