



QAD Adaptive Applications

**User Requirements Specifications  
QAD EQMS Applications  
Continuous Improvement**

70-3459-2025.1

QAD EQMS 2025.1

September 2025

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# Continuous Improvement User Requirements Specification Change Summary

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

<b>Date/Version</b>	<b>Description</b>	<b>Reference</b>	<b>Changed By</b>
JULY 2020/v2020	Initial upload	--	RQT
NOV 2020/v2020.1	Updated versioning; Added a General section.	p. 8	RQT
MAR 2021/v2021	Updated versioning; Added an Improvements section.	p. 7	RQT
AUG 2021/v2021.1	Updated versioning	--	RQT
MAR 2022/v2022	Updated versioning	--	RQT
SEPT 2022/v2022.1	Updated versioning; Updated the General section	p. 8	RQT
MAR 2023/v2023	Updated versioning; Updated the General section	p. 8	RQT
MAR 2024/v2024	Updated versioning; Updated the General section	p. 8	RQT
SEPT 2024/v2024.1	Updated versioning; Updated the General section	p. 8	RQT
MAR 2025/v2025	Updated versioning; Updated the General section	p. 8	RQT
SEPT 2025/v2025.1	Updated versioning; Updated the General section	p. 8	RQT

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## **Purpose**

This requirements specification includes the documentation of the EQMS Applications business requirements for the EQMS Continuous Improvement Module version 2025.1.

This document was used as the basis for the configuration of the Continuous Improvement Module 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 Continuous Improvement Module version 2025.1.

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## Continuous Improvement

Facilitates the management of continuous improvement projects, ad hoc issues, lessons learned, meeting planning, and recording.

### Projects

1. The system shall have the ability to manage new product development and/or a change to an existing product.
2. The system shall have the ability to define project templates based on a series of gates and tasks that can be used to start a new APQP project.
3. The system shall allow APQP projects to be defined as a set of gates, each of which has a set of tasks.
4. The system shall allow issues to be documented and related to APQP projects to allow items that arise during a project to be tracked.
5. The system shall allow APQP projects to be linked to one or more other APQP projects for the purposes of dividing large projects into smaller projects.
6. The system shall provide a method of approving an APQP project.
7. The system shall allow documenting the costs of quality associated with an APQP project.
8. The system shall allow creating, assigning, and tracking of tasks related to an APQP project.
9. The system shall allow the setup and maintenance of APQP project roles for the purposes of quickly reassigning projects tasks or approvals.
10. The system shall allow assigning APQP project tasks to a supplier for completion, with the ability of the supplier to complete the task directly in the system.
11. The system shall allow enforcing a file attachment with the completion of an APQP project task.
12. The system shall provide a method of approving an APQP project task.
13. The system shall allow checklists to be defined and completed for an APQP project task.
14. The system shall have the ability to document the results of meetings.
15. The system shall have the ability to manually color code the status of APQP project gates.
16. The system shall have the ability to link records to APQP projects.
17. The system shall notify suppliers who are selected as responsible for project tasks.
18. The system shall have the ability to document risks associated with an APQP project that can default based on a risk library only for APQP projects.
19. The system shall allow APQP project types to be associated with PPAP requirement set and specific project tasks can be linked to a specific requirement and require specific PPAP documents to be attached (added in 2018.1).
20. The system shall allow files linked to APQP project tasks to be copied to the PPAP for the associated requirement of the PPAP record associated with the project (added in 2018.1).
21. The system shall allow approval of APQP project gates (added in 2018.1).
22. The system shall have approval of a APQP project charter (added in 2018.1).
23. The system shall support dependencies between tasks for an APQP project to drive timing for dependent tasks (added in 2018.1).

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24. The system shall calculate the project gate start and finish date based on the minimum task start date and maximum task finish date of the tasks in the gate, respectively (added in 2018.1).
  25. The system shall allow an APQP champion to assign a project task to a supplier contact (added in 2018.1).
  26. The system shall provide a visual green/yellow/red indicator to provide the past due status of tasks (added in 2018.1).

## **Lessons Learned**

1. The system shall have the ability to document lessons learned grouped by lessons learned category.
2. The system shall have the ability to summarize a lesson learned in terms of the problem or success, impact, and recommendation.
3. The system shall have the ability to set up a review frequency for a lesson learned and notify the owner upon reaching the next review date.
4. The system shall have the ability to link lessons learned to non-conformances, APQP projects, issues, risks, and/or improvements.

## **Improvements**

1. The system shall have the ability to create an improvement idea and document the potential impacts.
2. The system shall have support for multiple tasks assigned to various people and track progress toward the improvement.
3. The system shall have the ability to document the achieved impacts of the improvement.
4. The system shall allow the improvements to be linked to a project, process(es), and lesson learned.
5. The system shall notify the Champion when the improvement moves to the Planned state (added in 2021).
6. The system shall notify the Champion when the improvement moves to the Submit state (added in 2021).
7. The system shall notify the Champion when the target implementation date is passed and the improvement is not completed (added in 2021).
8. The system shall notify the Submitted By when the improvement moves to the Denied state (added in 2021).

## **Issues**

1. The system shall have the ability to document ad hoc tasks for people to accomplish by a due date with the ability to track progress.
2. The system shall have the ability to drive sub-workflows in an issue based on issue category (added in 2019).

## **Meetings**

1. The system shall have the ability to define meeting types including a draft agenda.
2. The system shall have the ability to document the results of meetings.

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3. The system shall have the ability to copy a meeting.
  4. The system shall have the ability to drive sub-workflows in an issue based on issue category (added in 2019).

## General

1. The system shall support Coordinated Universal Time (UTC), which adjusts Date/Time fields to represent the Date/Time in the current user's timezone (added in 2020.1).
2. The system shall have a global search feature to search for records within the system that have the search term in applicable fields and within files linked to File fields (added in 2020.1).
3. The system shall have the ability to create URLs to other systems in the Navigation menu (added in 2020.1).
4. The system shall provide audit trail reports for all records (added in 2022.1).
5. The system shall have an option to disable the ability to approve a record without opening it (added in 2022.1).
6. The system shall allow checklist responses to have the same score among different responses—e.g. to allow all wrong answers to have a zero value (added in 2023).
7. The system shall allow users to easily move to the next detailed record based on the search screen initiating the detailed screen view (added in 2023).
8. The system shall provide a web-based report designing tool (added in 2023).
9. The system shall provide an option to limit users to be able to only view records associated with the sites specified in their employee record (added in 2023).
10. The system shall have an option to see the prior rejection comments during a re-approval of a record (added in 2023).
11. The system shall provide the ability to report on the security configured for each process including customer extensions/changes to security setup (added in 2024).
12. The system shall allow the user to cancel the generation of a report (added in 2024).
13. The system shall provide the ability to open multiple EQMS windows in the same browser tab (added in 2024).
14. The system shall provide the ability to embed video in key areas (added in 2024.1).
15. The system shall provide the ability to support arrays of images in key areas (added in 2024.1).
16. The system shall provide (for critical workflow processes) a visual indicator of the progress of a record through its life-cycle (added in v2025).
17. The system shall provide a mechanism to socialize a record with others including @mentions that notify those individuals mentioned (added in v2025).
18. The system shall provide the ability for Semantic Search to apply to search screens and global search results (added in v2025.1).