



QAD Adaptive Applications

Technical Reference
QAD EQMS Installation Guide

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QAD Inc.

100 Innovation Place

Santa Barbara, CA 93108

Phone: +1 (805) 566-6100

<http://www.qad.com>

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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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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

Chapter 1

Introduction

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Introduction

The installation of QAD EQMS 2025 is performed using a utility called Site Manager. Site Manager handles the installation and updates of the QAD EQMS 2025 application.

About This Guide

This installation guide focuses on:

- Prerequisites for using Site Manager
- Downloading and installing Site Manager
- Downloading the QAD EQMS 2025 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 2025

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

Chapter 2

Setting Up the Installation

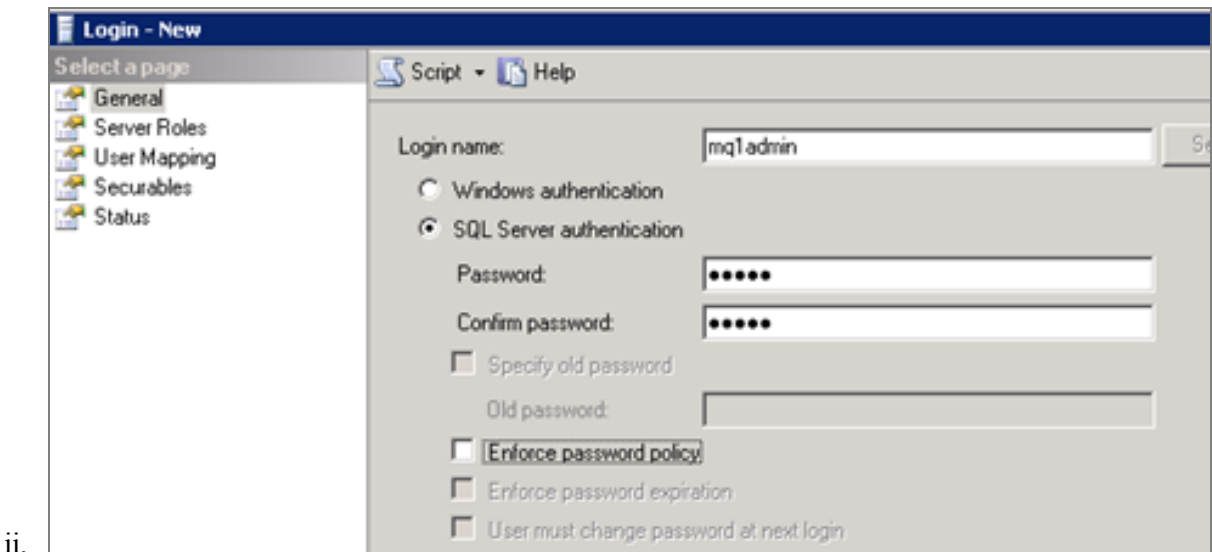
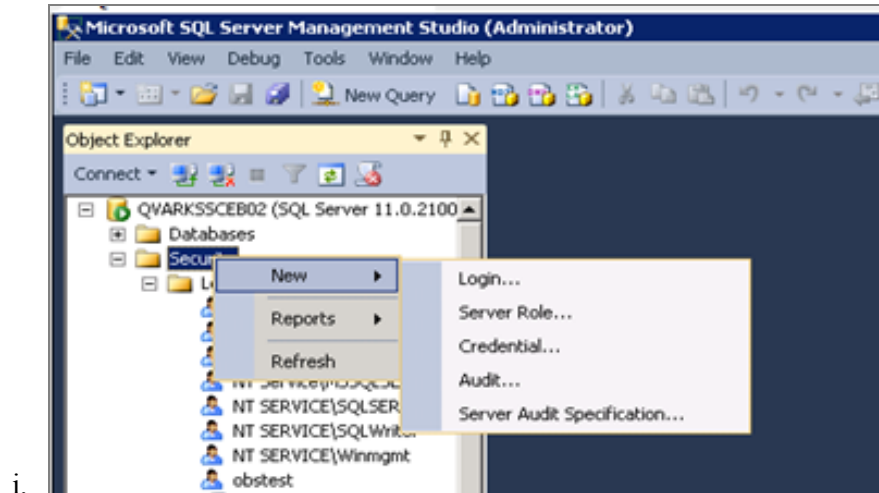
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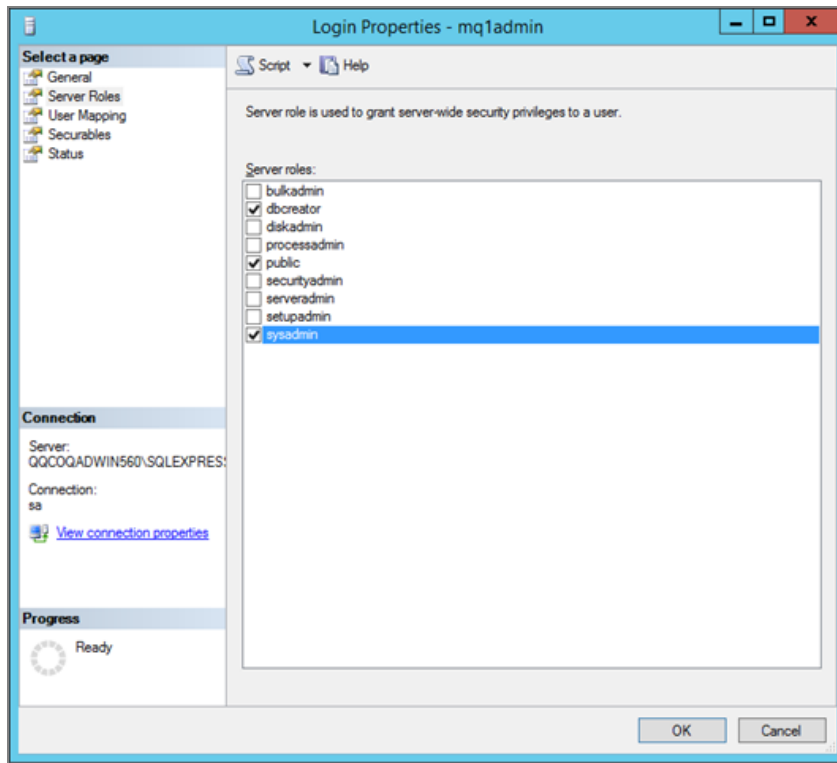
SQL Server Setup

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".



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

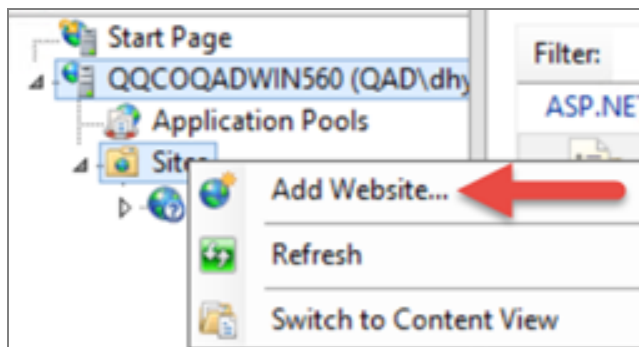
- a. Click Server Roles in the left panel.
- b. Assign the login the dbcreator, sysadmin, and public roles.



- 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')`

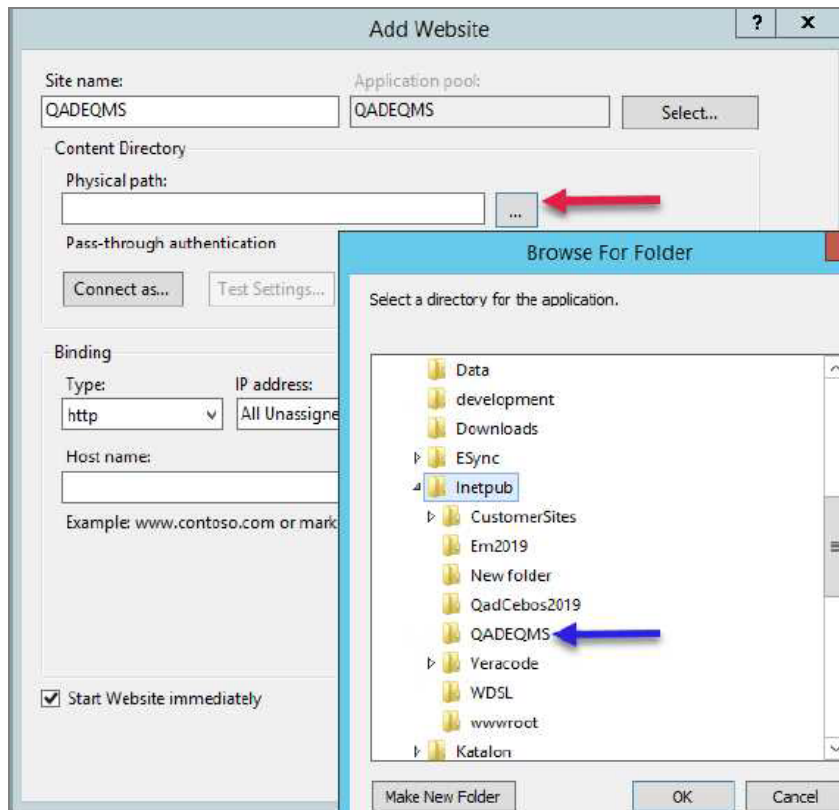
Web Server Setup (IIS)

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

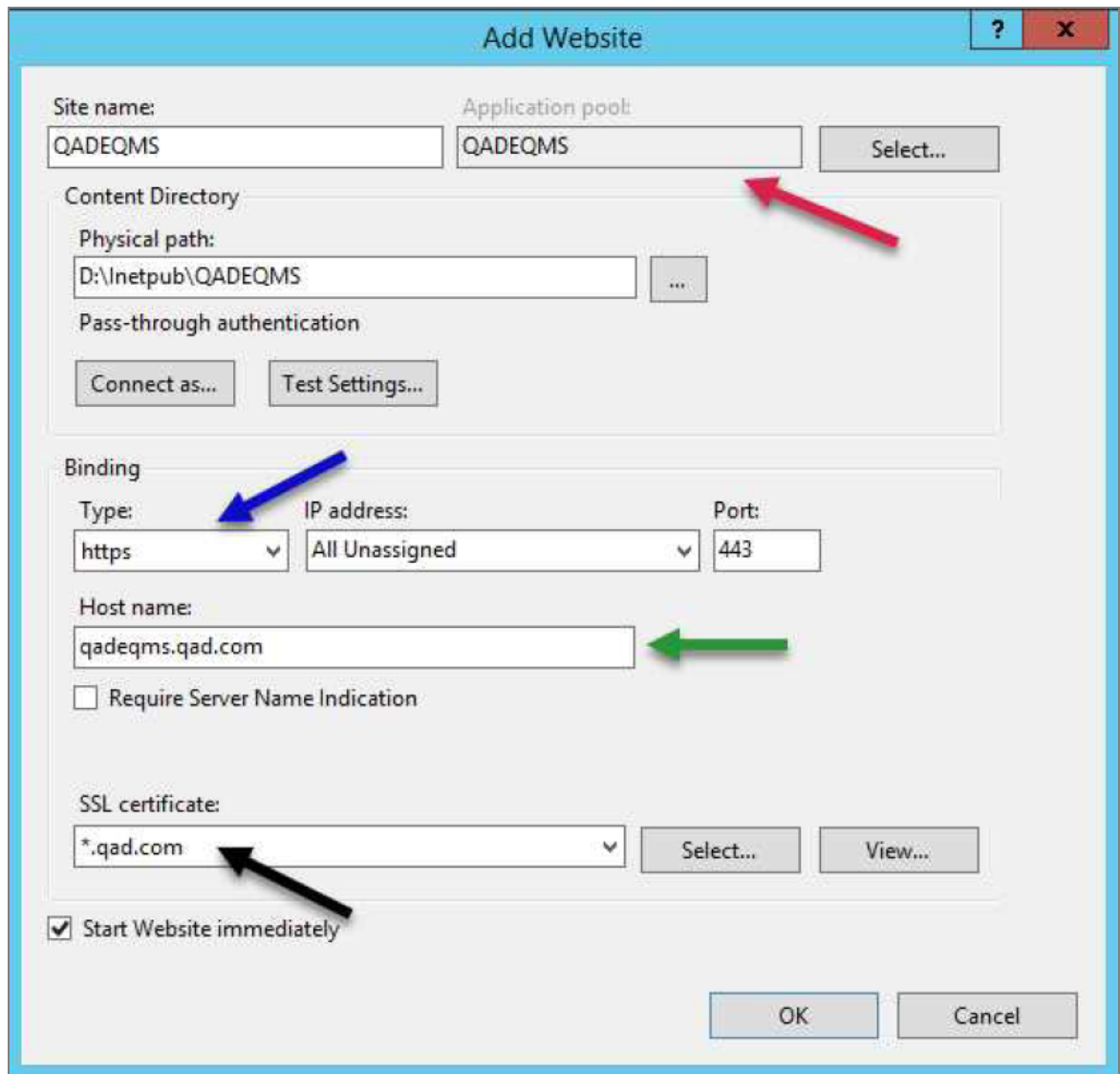


i.

- 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).



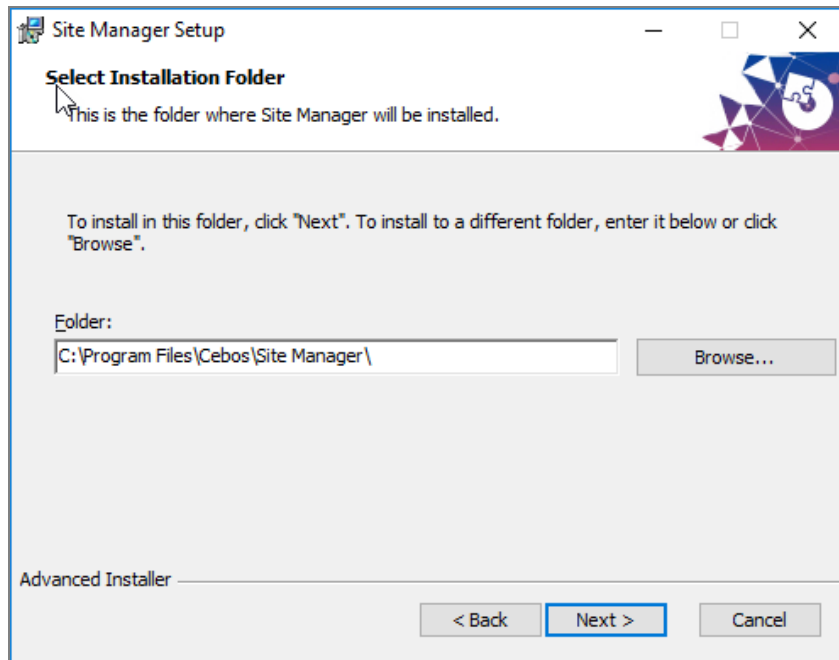
i.

Download Site Manager and the QAD EQMS 2025 Package

1. Navigate to the [QAD EQMS 2025 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.

Chapter 3

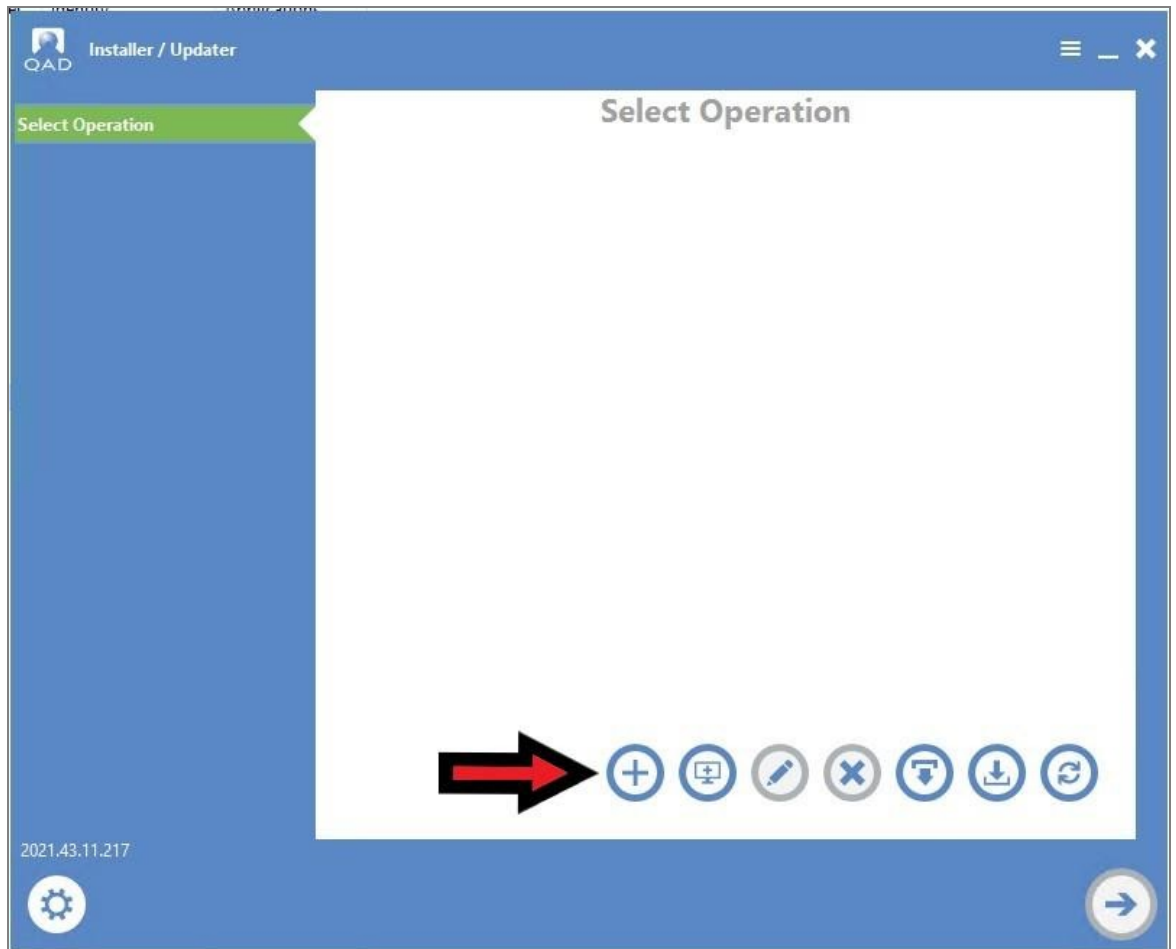
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Install QAD EQMS 2025

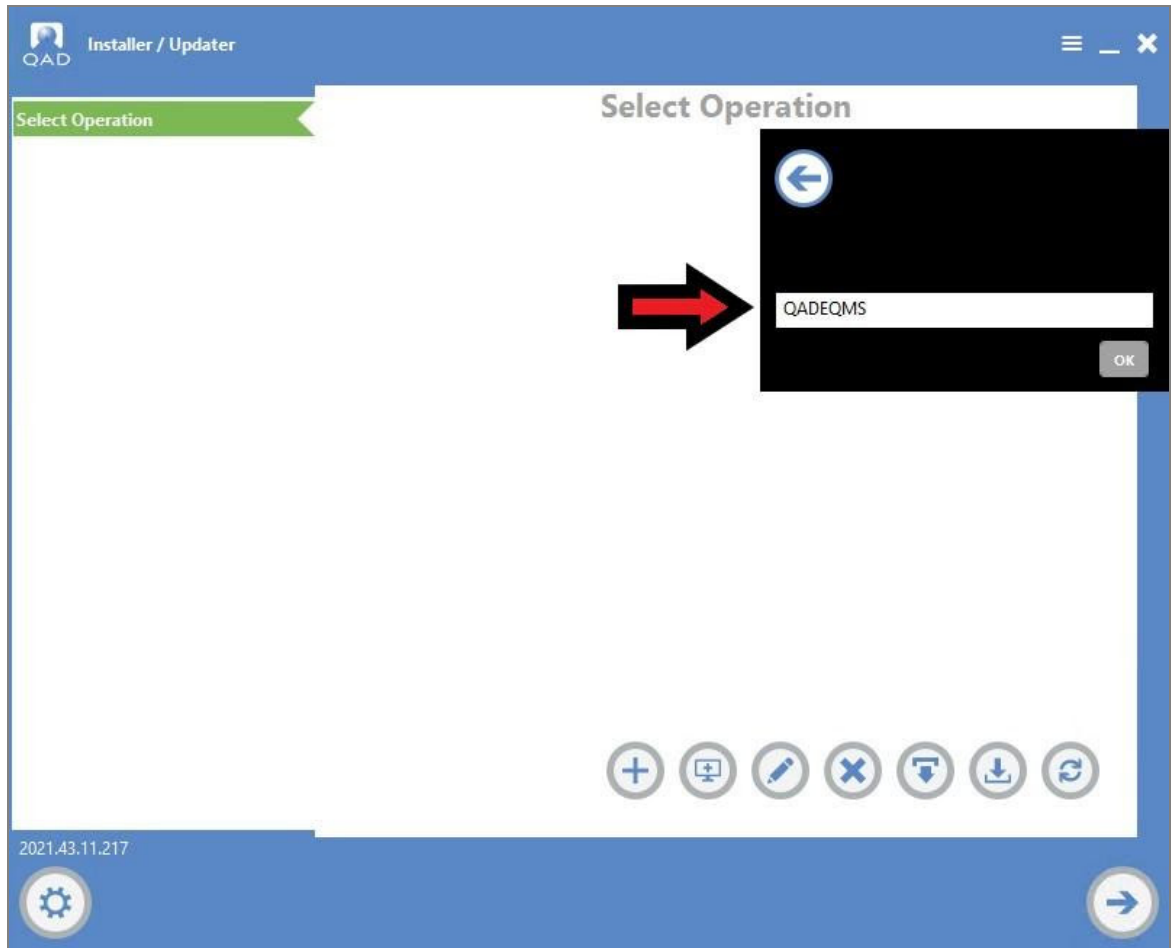
Open Site Manager and Begin Installation

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

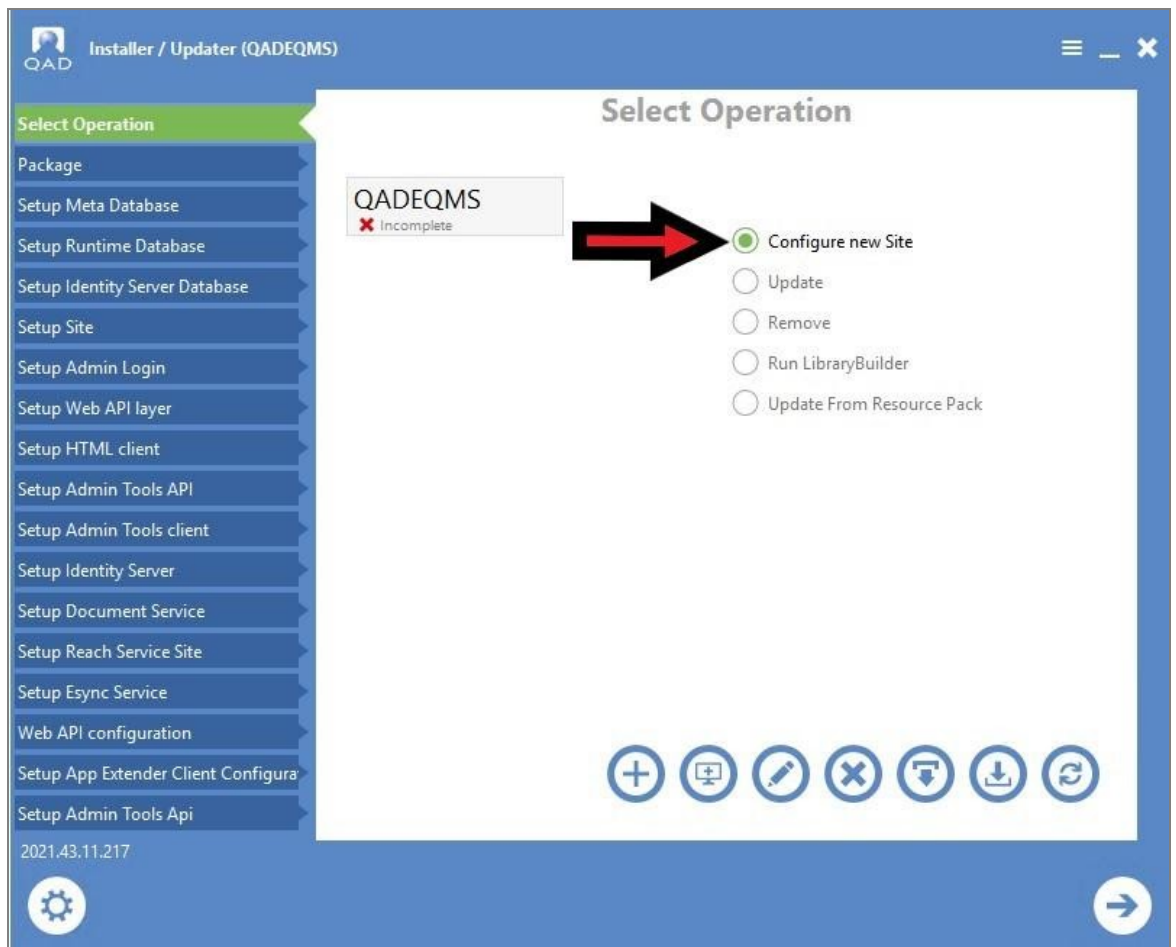


a.

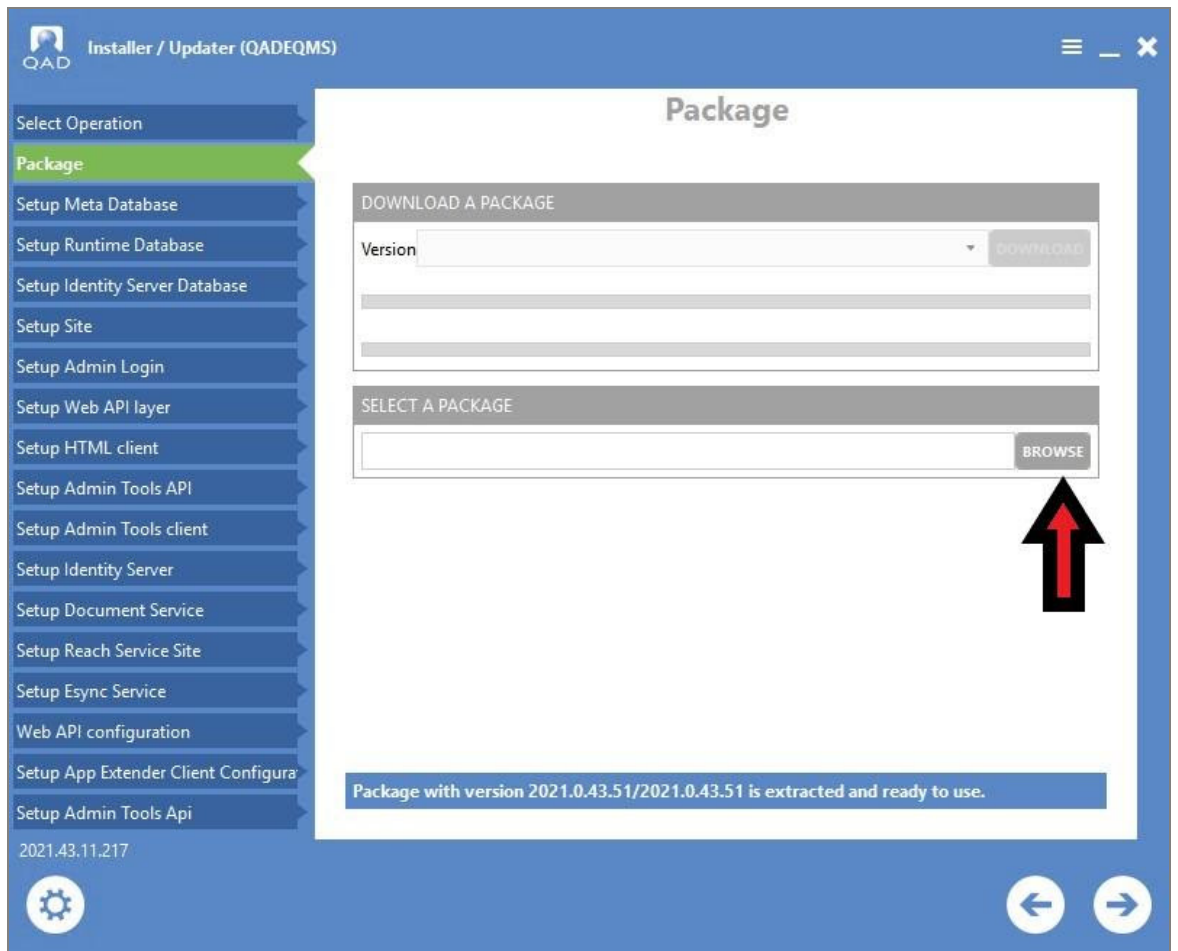
2. Fill in the name of Site and click OK.



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

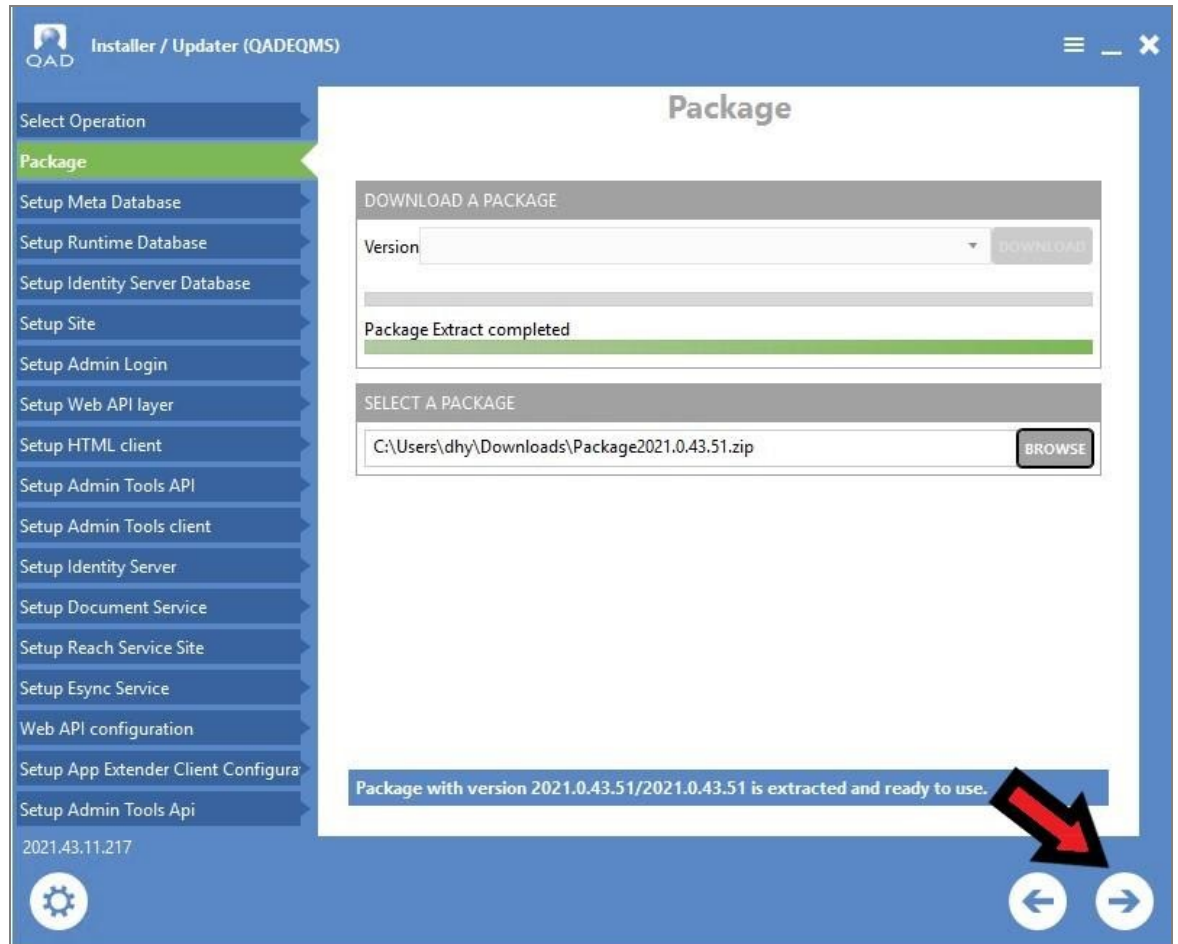


- a.
 4. Click the Browse button (red arrow) and navigate to the location in which the package was downloaded.



a.

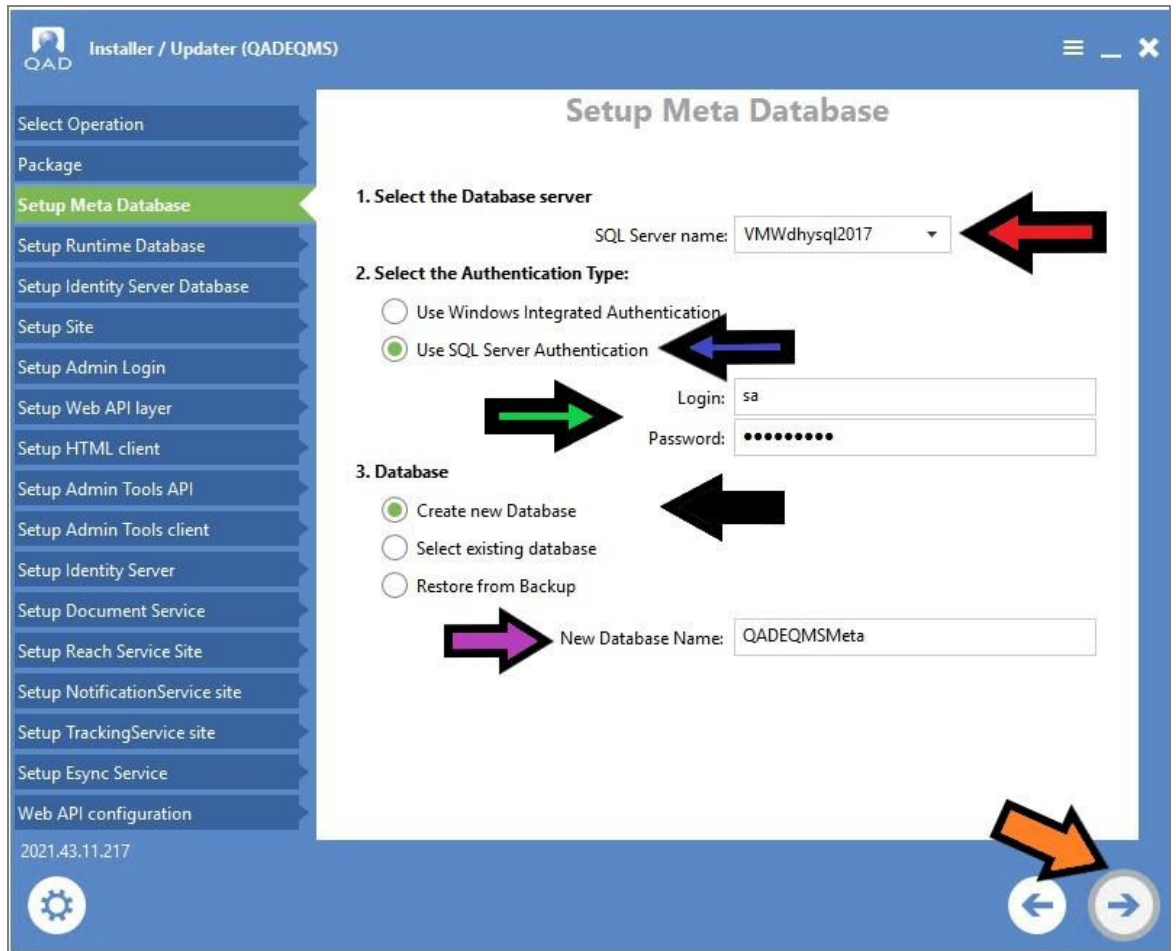
5. Wait for the package to extract and click the Next arrow (red arrow).



a.

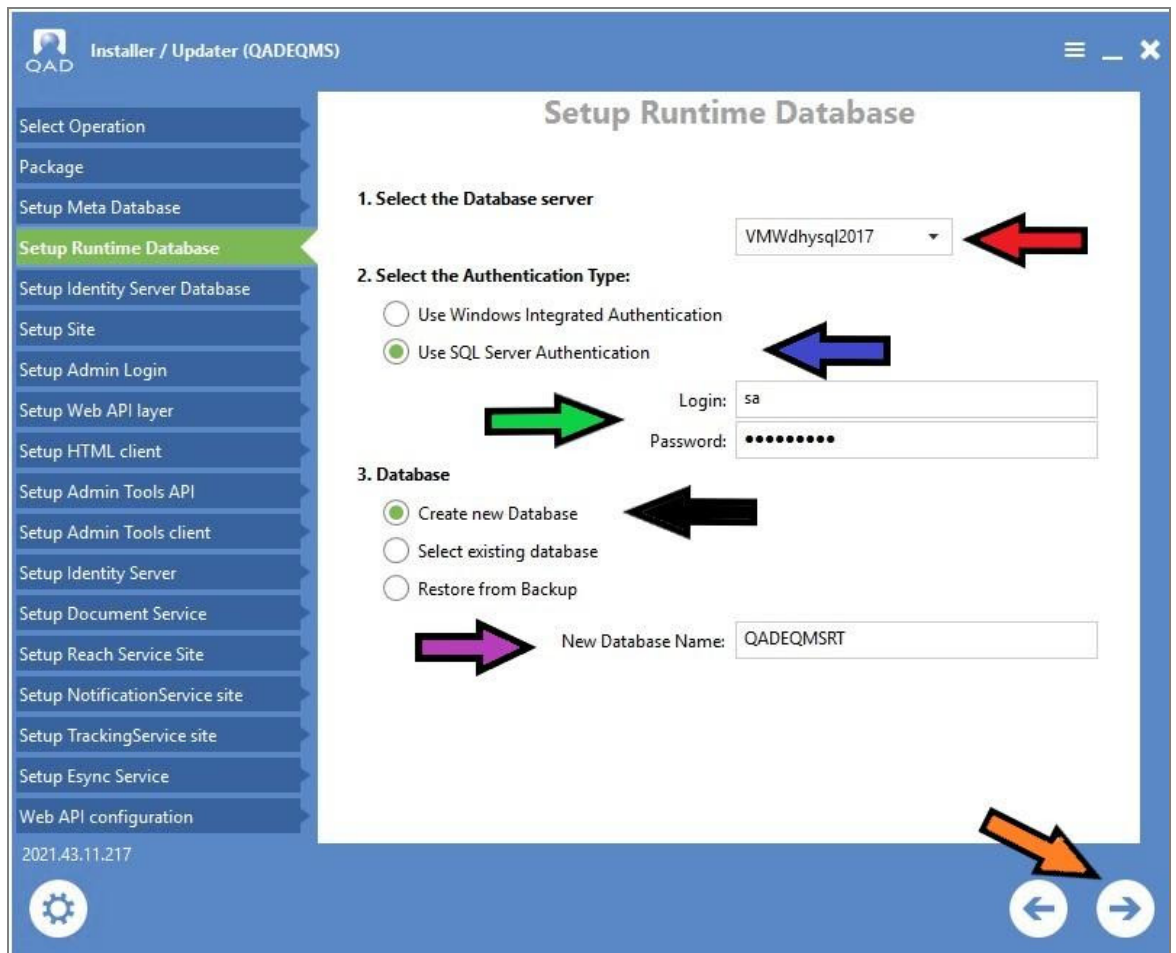
Set Up the Databases

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).

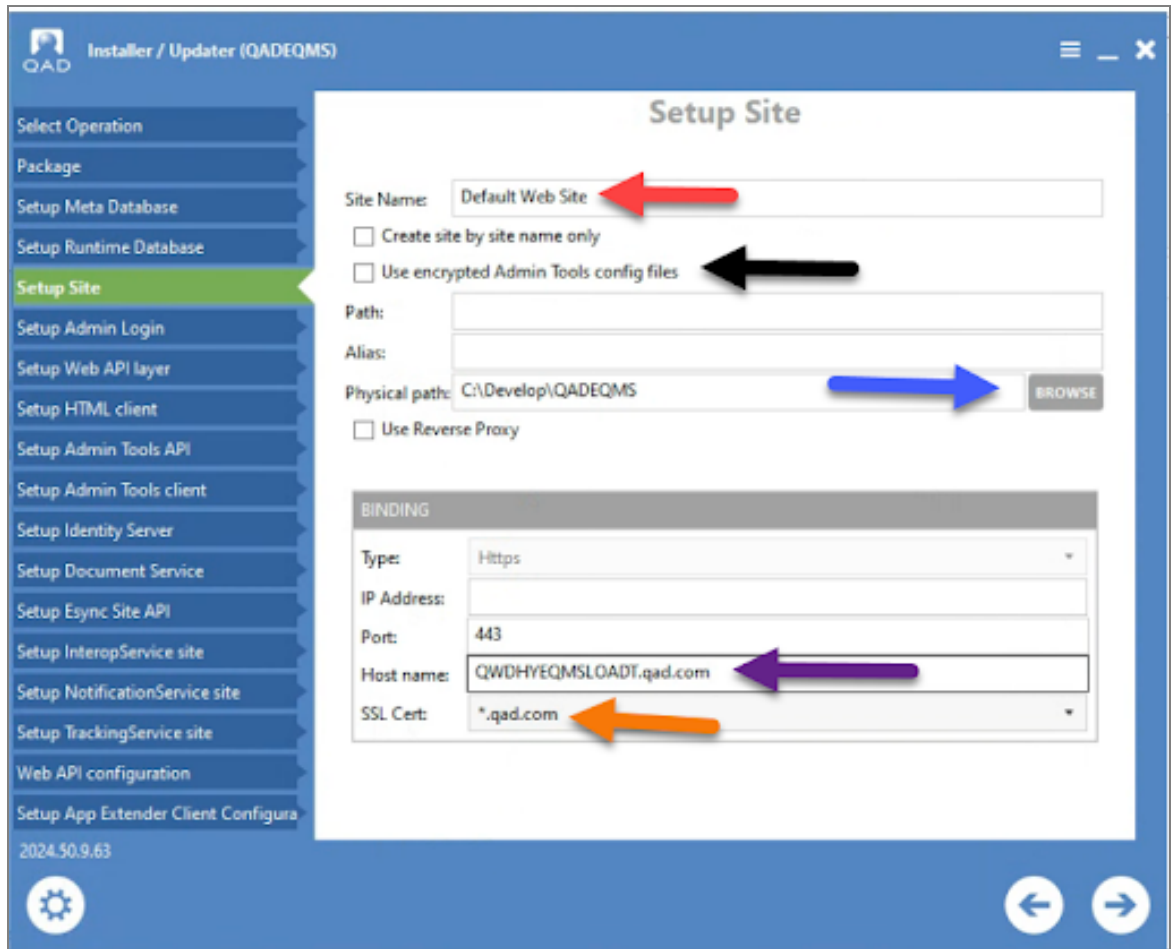


a.

Set Up the Application Site

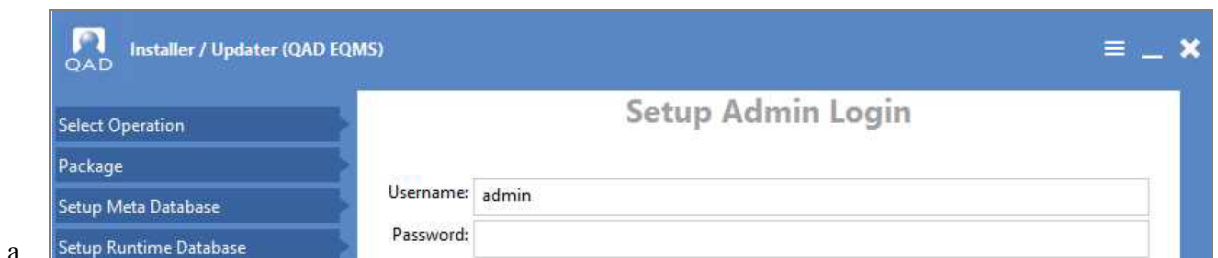
1. Enter the Site Name as it is in IIS (red arrow), check the Use Encrypted Admin Tools config files check box (black arrow), set the Physical Path (blue arrow), set the Host Name to be the same as the Host Name set in the Site creation in IIS (purple arrow), and

set the SSL Cert (orange arrow).



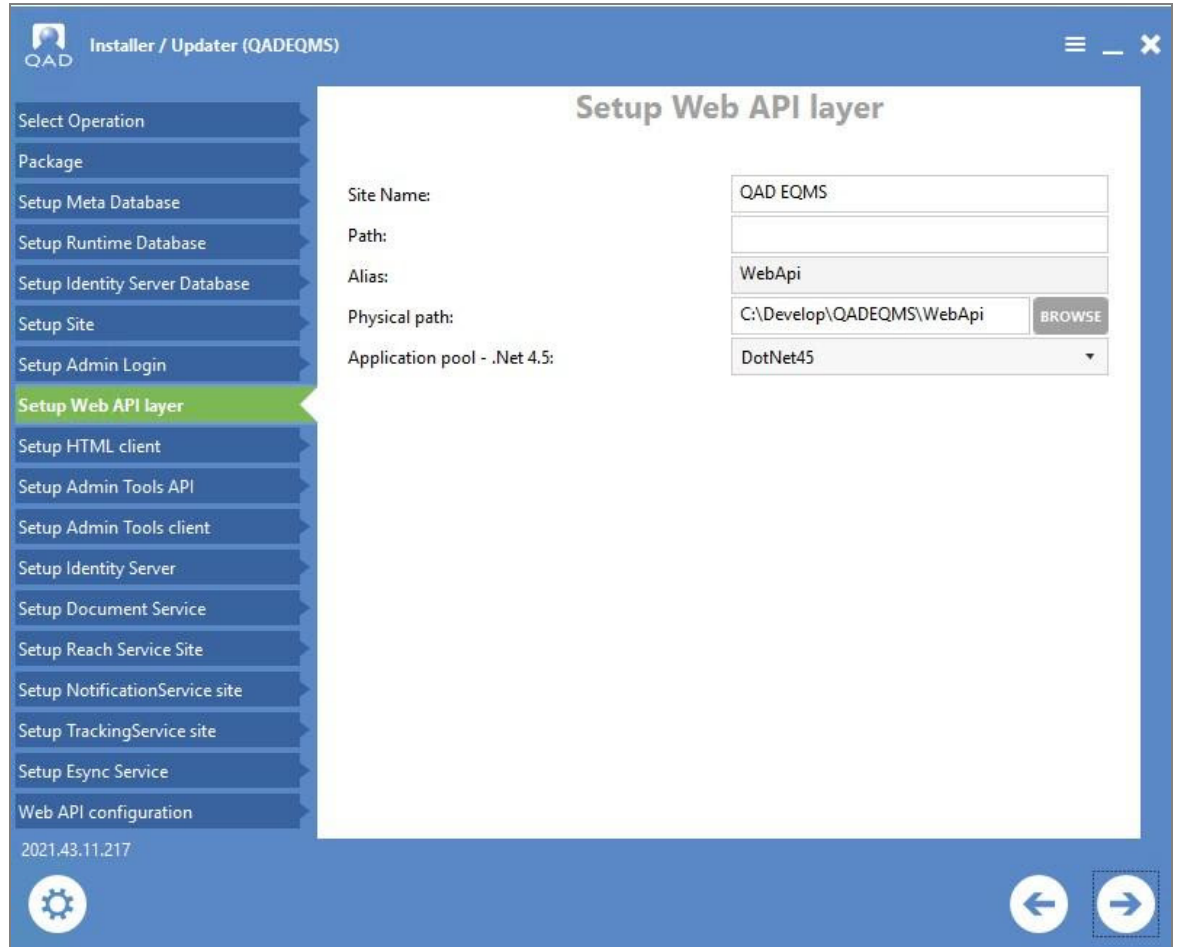
Creating the Admin Password

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.



Set Up the Web API Layer

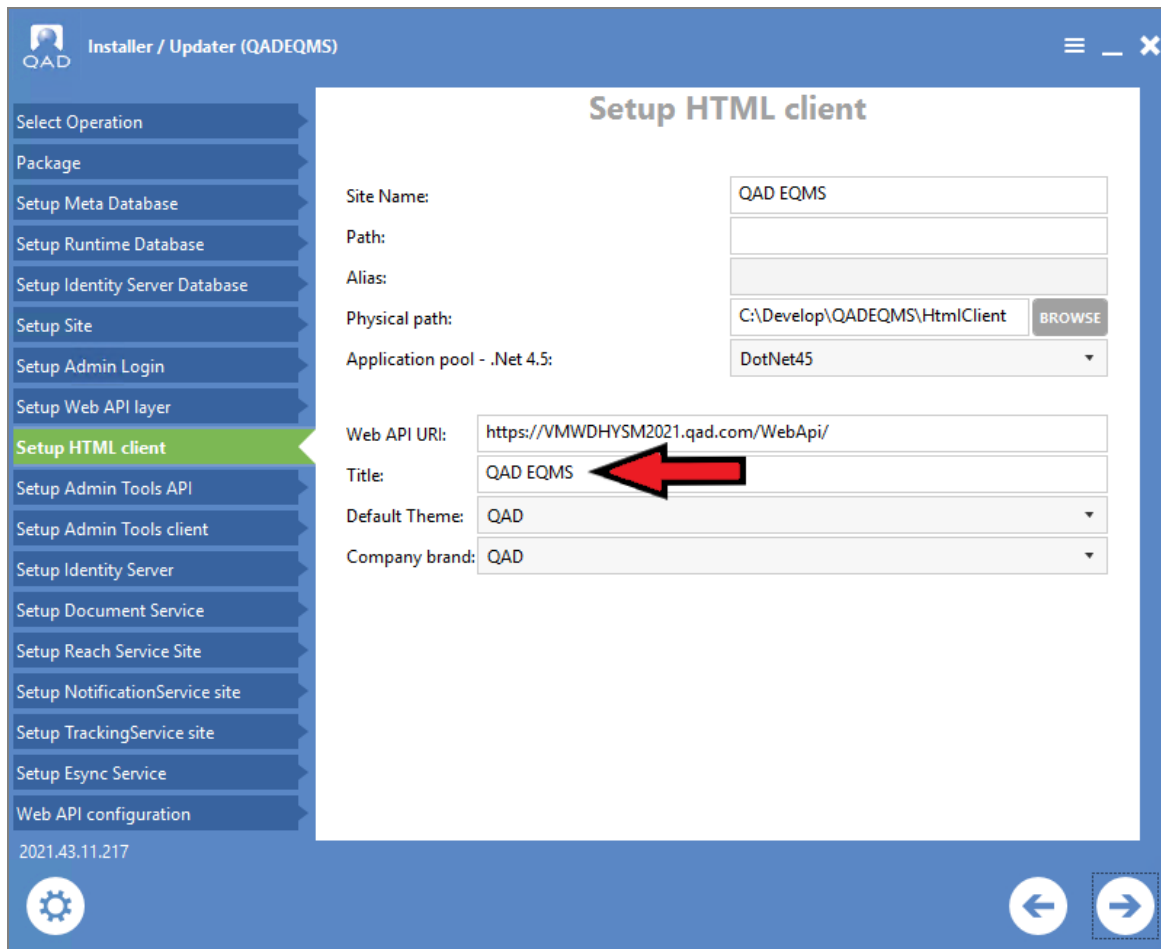
1. At this point of the installation, no input is required from the user, aside from moving through each screen. During this section, make sure the values here are valid.



a.

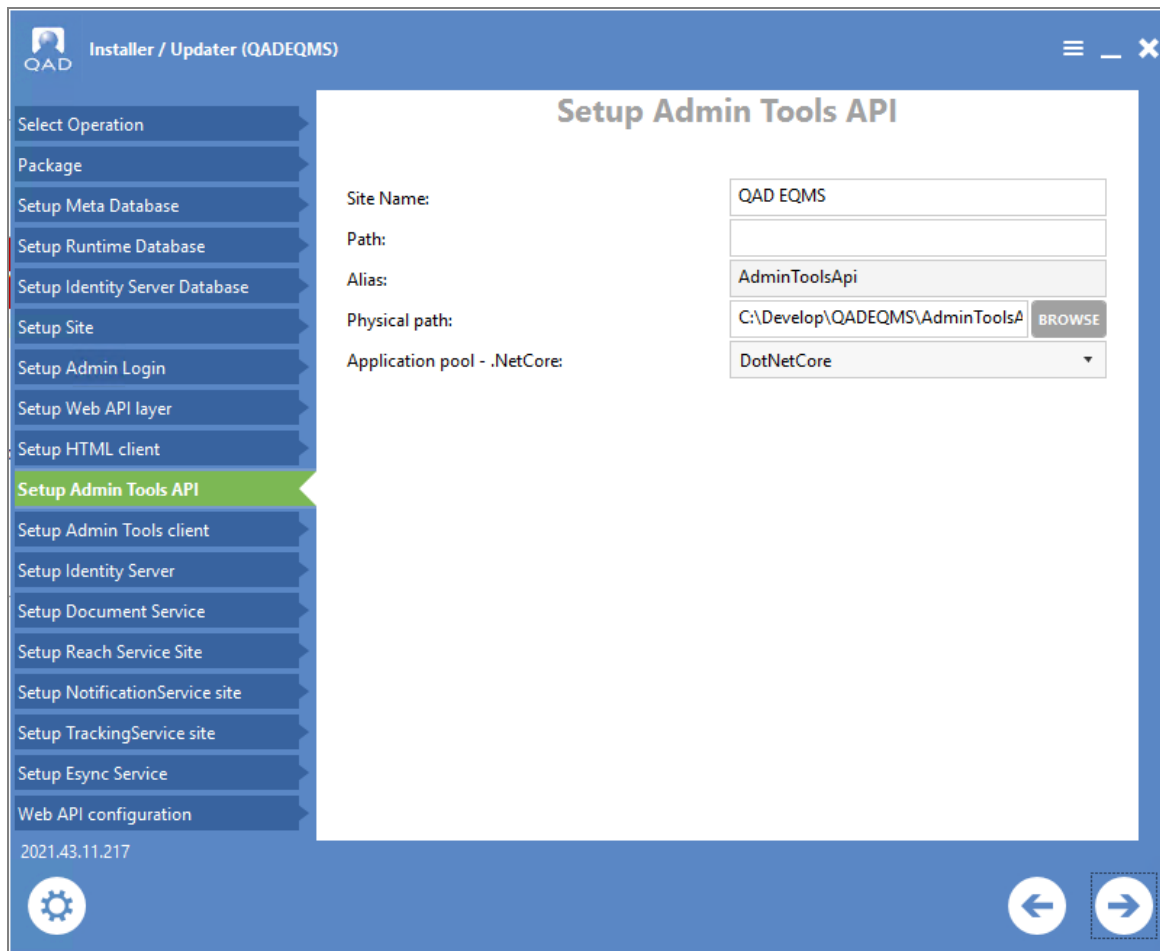
Set Up the HTML Client

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.



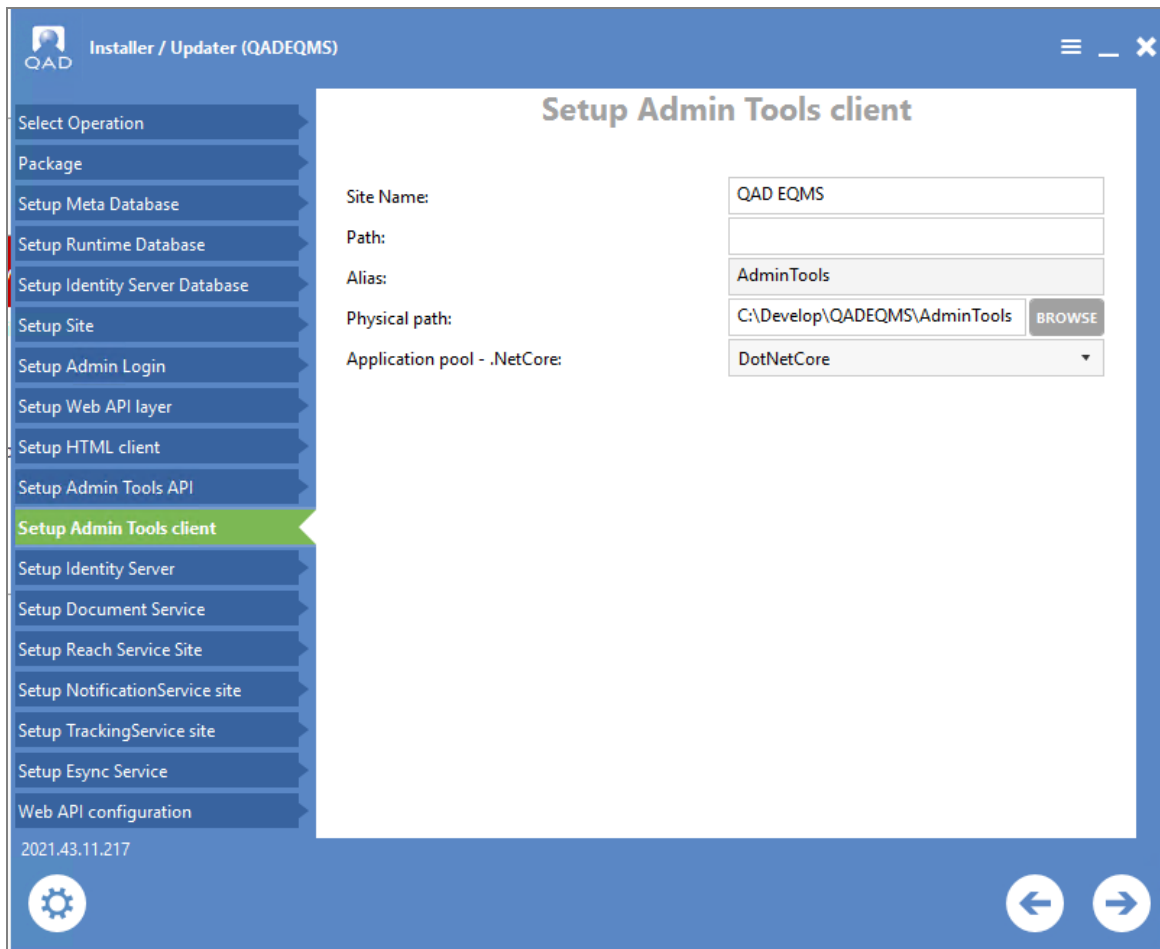
Set Up Admin Tools API

Below is an example of how it should look.



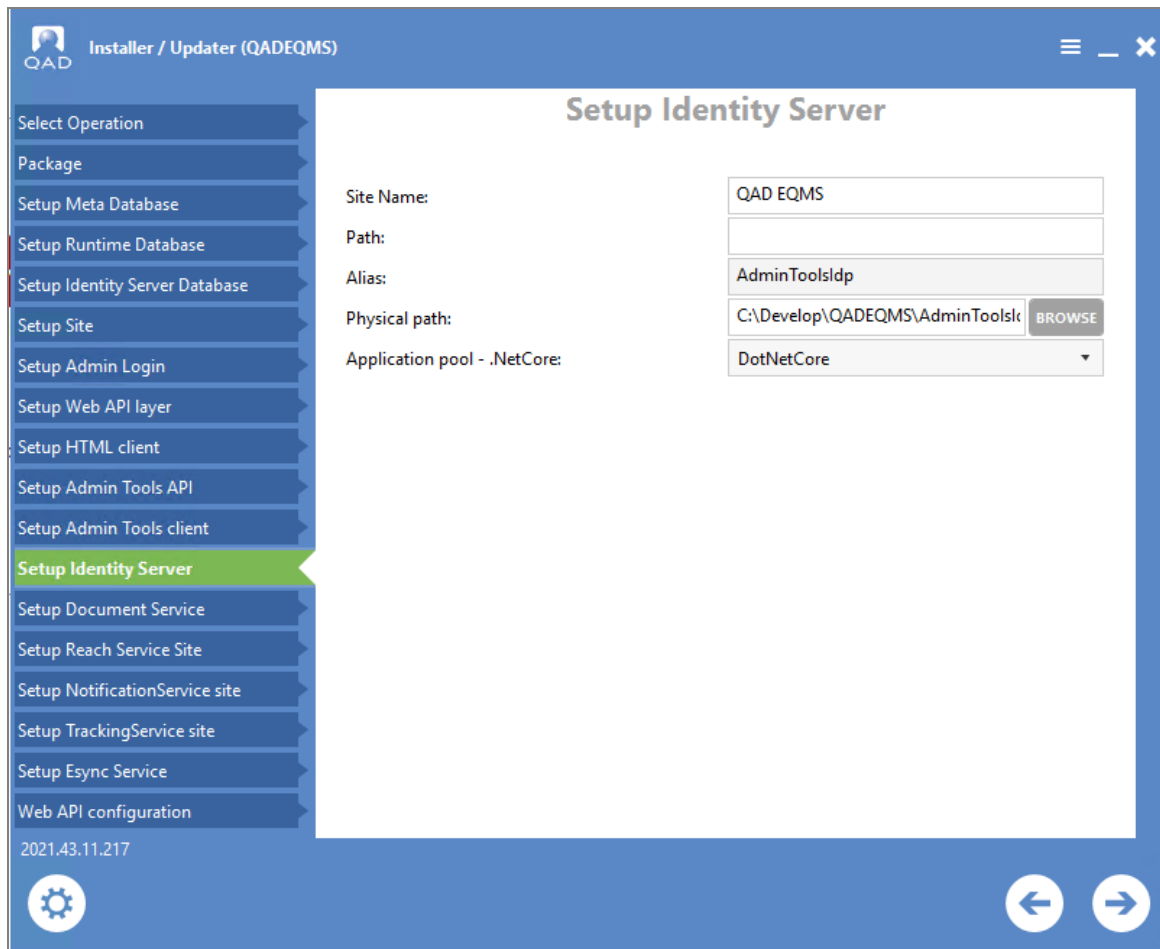
Set Up Admin Tools Client

Below is an example of how it should look.



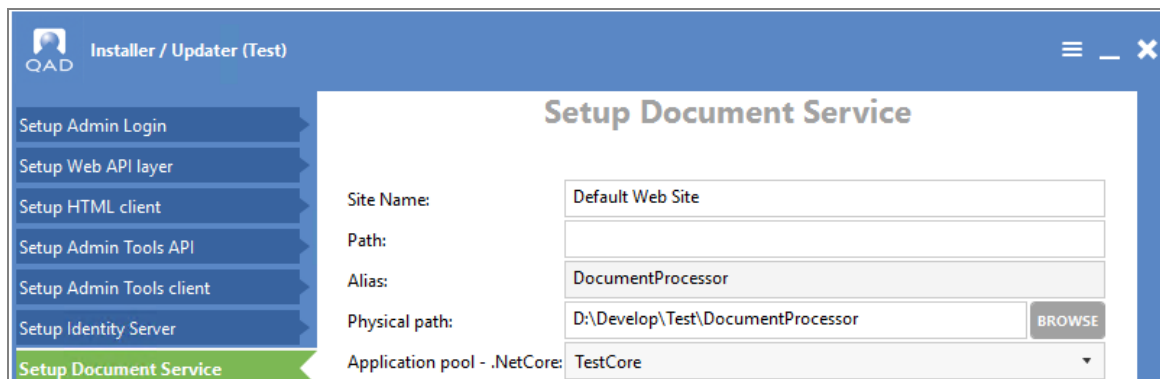
Set Up the Identity Server

Below is an example of how it should look.



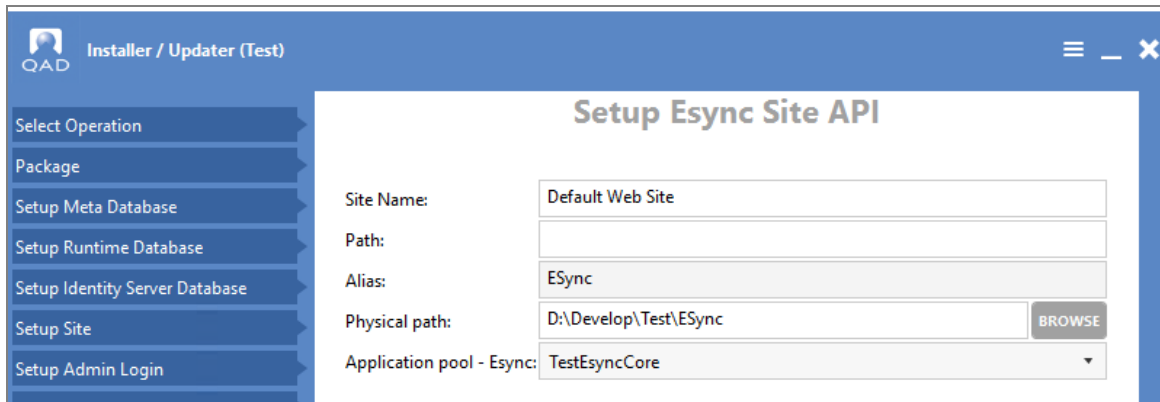
Set Up the Document Service

Below is an example of how it should look.



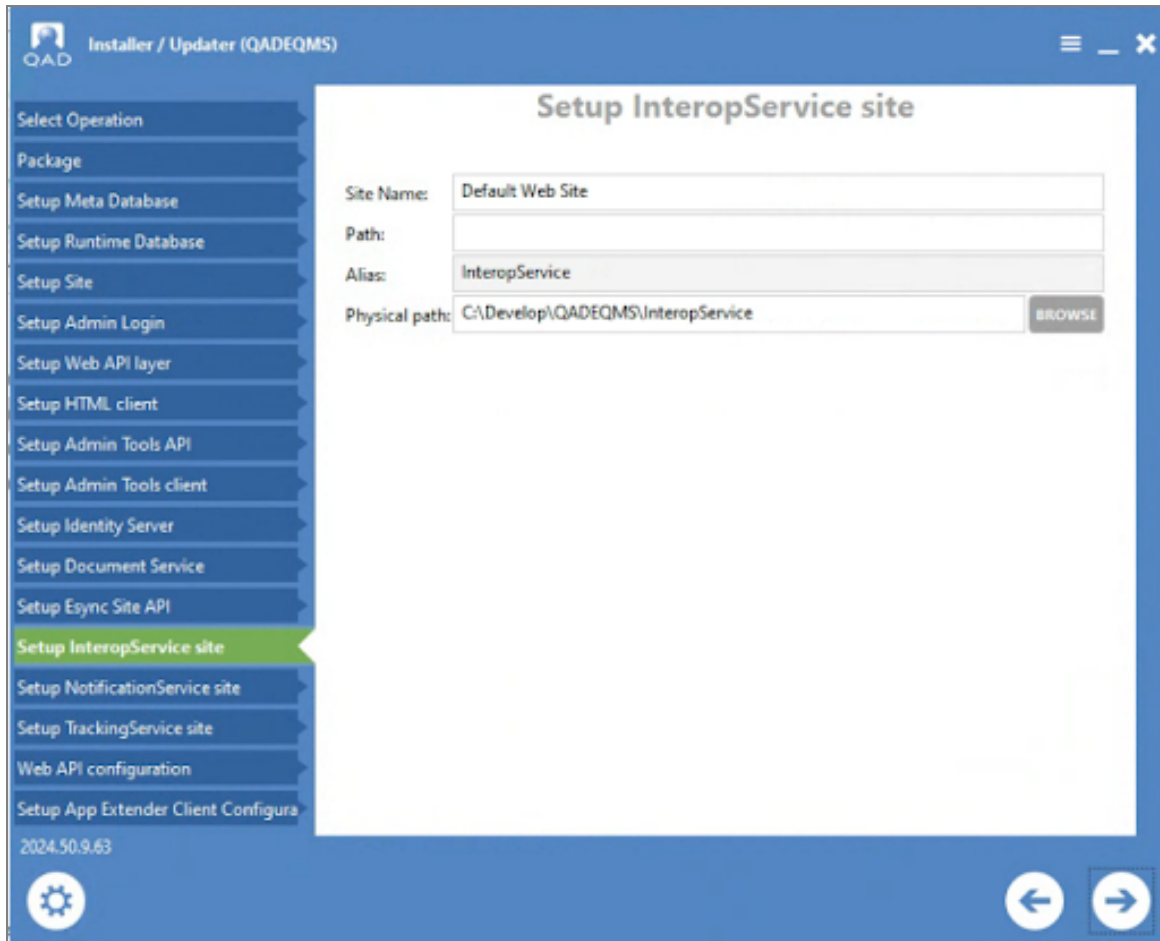
Set Up Esync API

Below is an example of how it should look.



Set Up InteropService Site

Below is an example of how it should look.



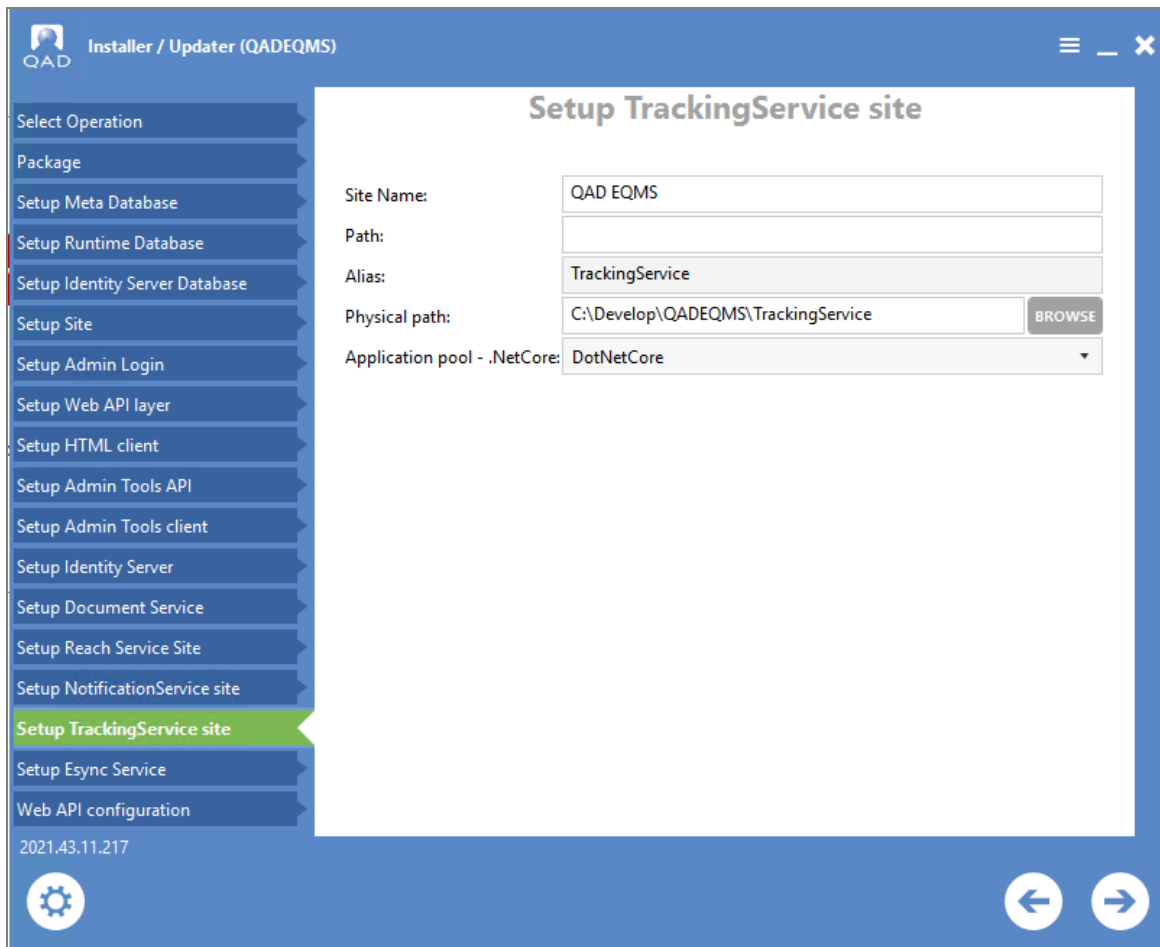
Set Up Notification Service

Below is an example of how it should look.

The screenshot shows the 'Installer / Updater (QADEQMS)' window. On the left is a navigation menu with the following items: 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 NotificationService site (highlighted in green), Setup TrackingService site, Setup Esync Service, and Web API configuration. The version number '2021.43.11.217' is displayed below the menu. The main area is titled 'Setup NotificationService site' and contains the following fields: Site Name: QAD EQMS; Path: (empty); Alias: NotificationService; Physical path: C:\Develop\QADEQMS\NotificationService with a 'BROWSE' button; and Application pool - .NetCore: DotNetCore. At the bottom of the window are a gear icon, a left arrow, and a right arrow.

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).

Installer / Updater (QAD EQMS)

Web API configuration

Before After

Configure for HTTPS

appSettings	
ActionManagerInterval	0 1 10 ? **
AdminLogin	admin
AdminPassword	aimhi
AllowEmailMessages	true
ApplicationPath	C:\inetpub\QMSREL\Master\WebApi
ApplicationRootUrl	https://qmsrel.qad.com/master/webapi/
ClientValidationEnabled	-

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)

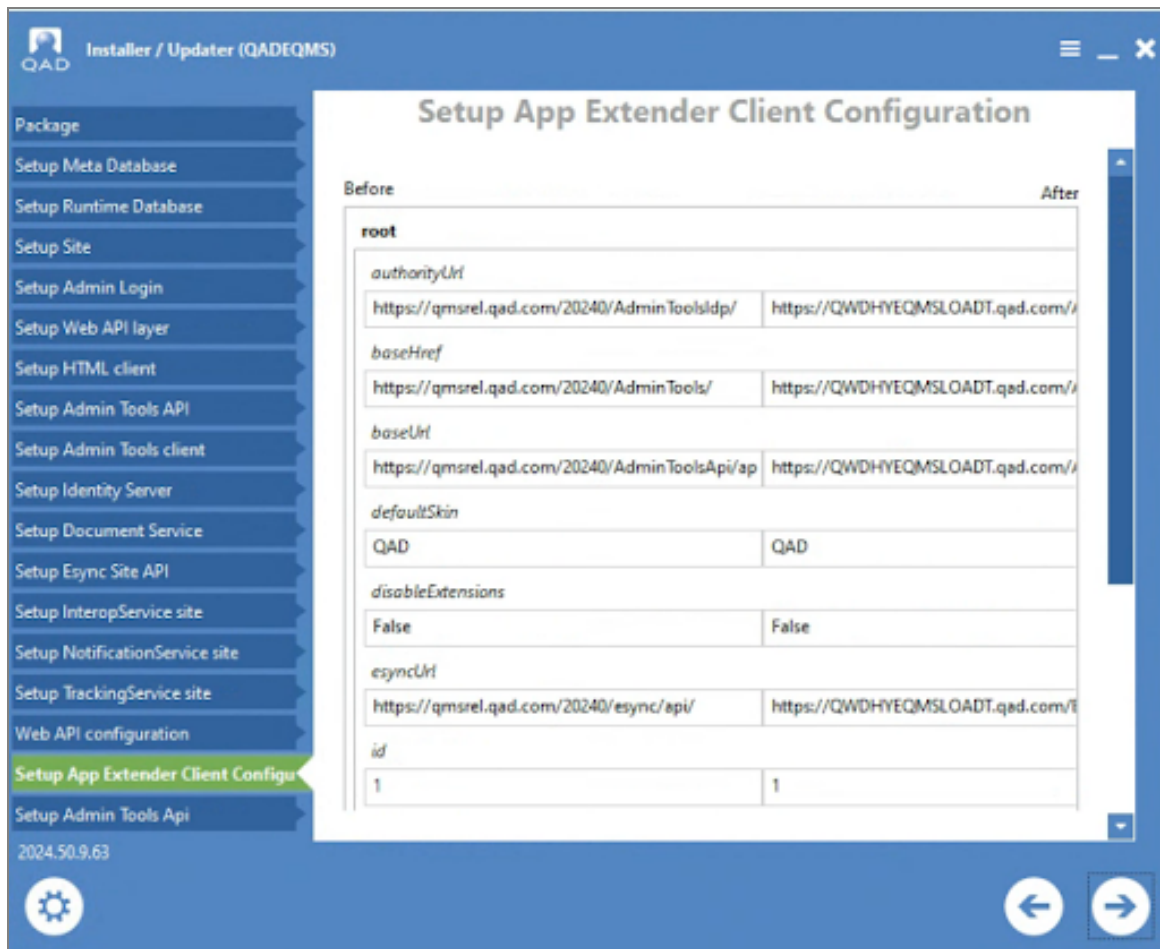
☰
—
✕

- 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

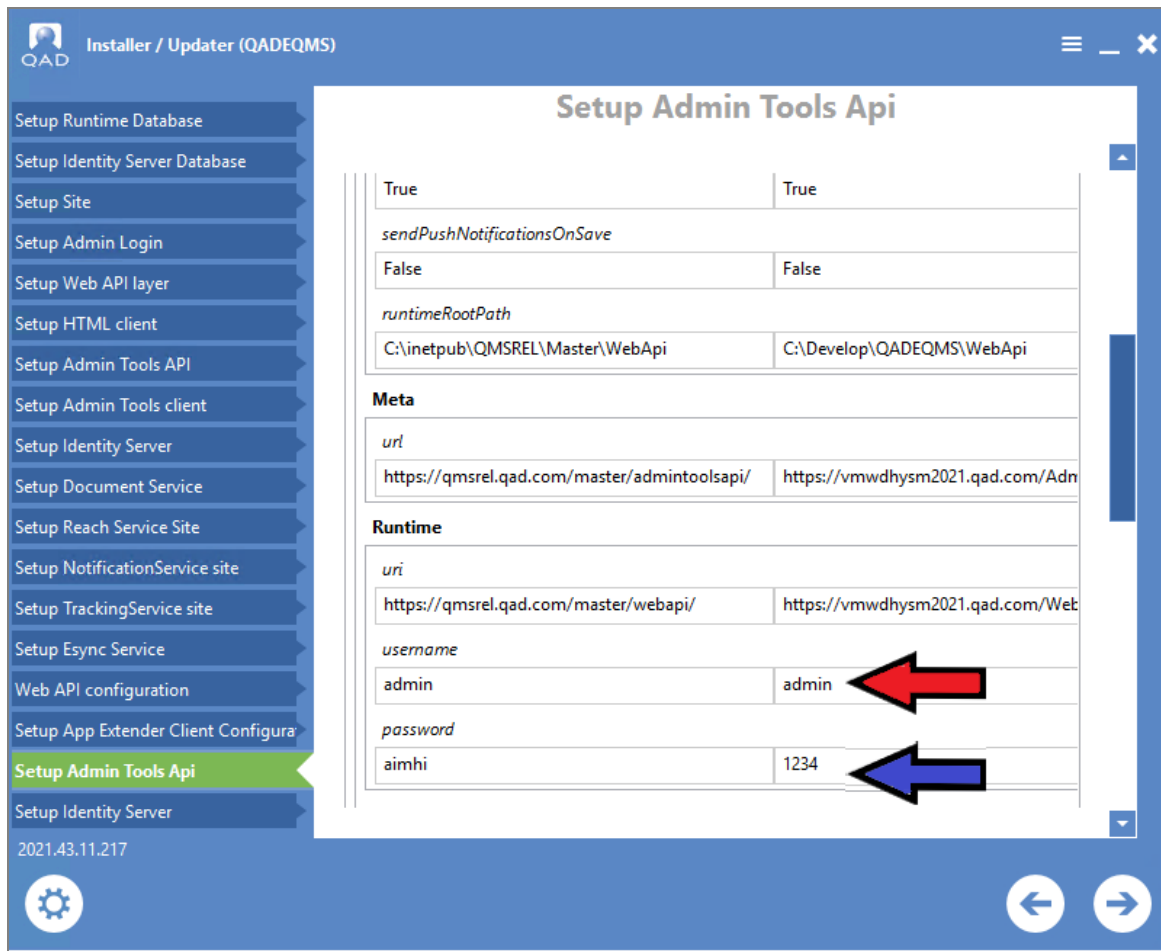
Setup App Extender Client Configuration

Before	After
root	
<i>authorityUrl</i>	
https://qmsrel.qad.com/master/admintoolsidp/	https://VMWDHYSM2021.qad.com/Adn
<i>baseHref</i>	
https://qmsrel.qad.com/master/admintools/	https://VMWDHYSM2021.qad.com/Adn
<i>baseUrl</i>	
https://qmsrel.qad.com/master/admintoolsapi/ap	https://VMWDHYSM2021.qad.com/Adn
<i>defaultSkin</i>	
QAD	QAD
<i>disableExtensions</i>	
true	true
<i>id</i>	
1	1
<i>name</i>	
dev	dev



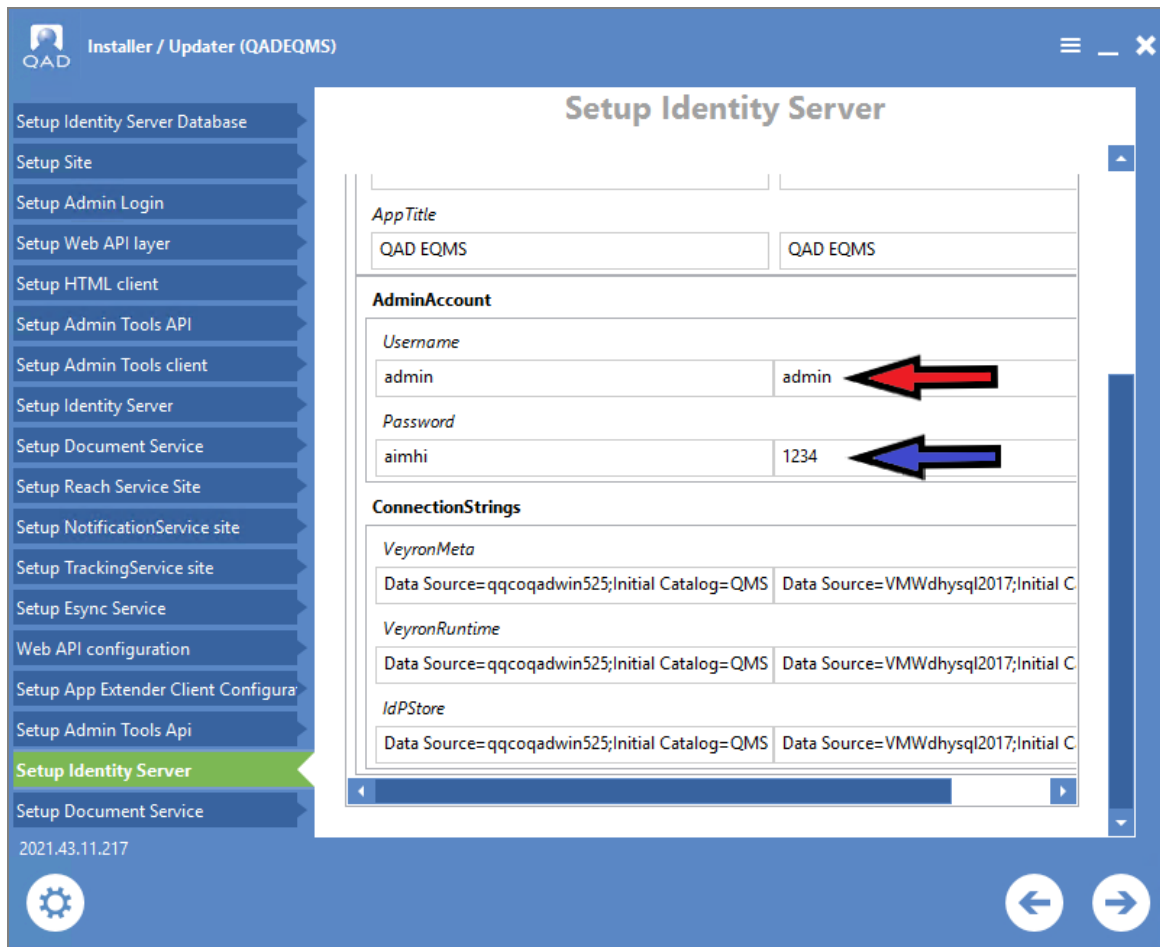
Set Up Admin Tools Api

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



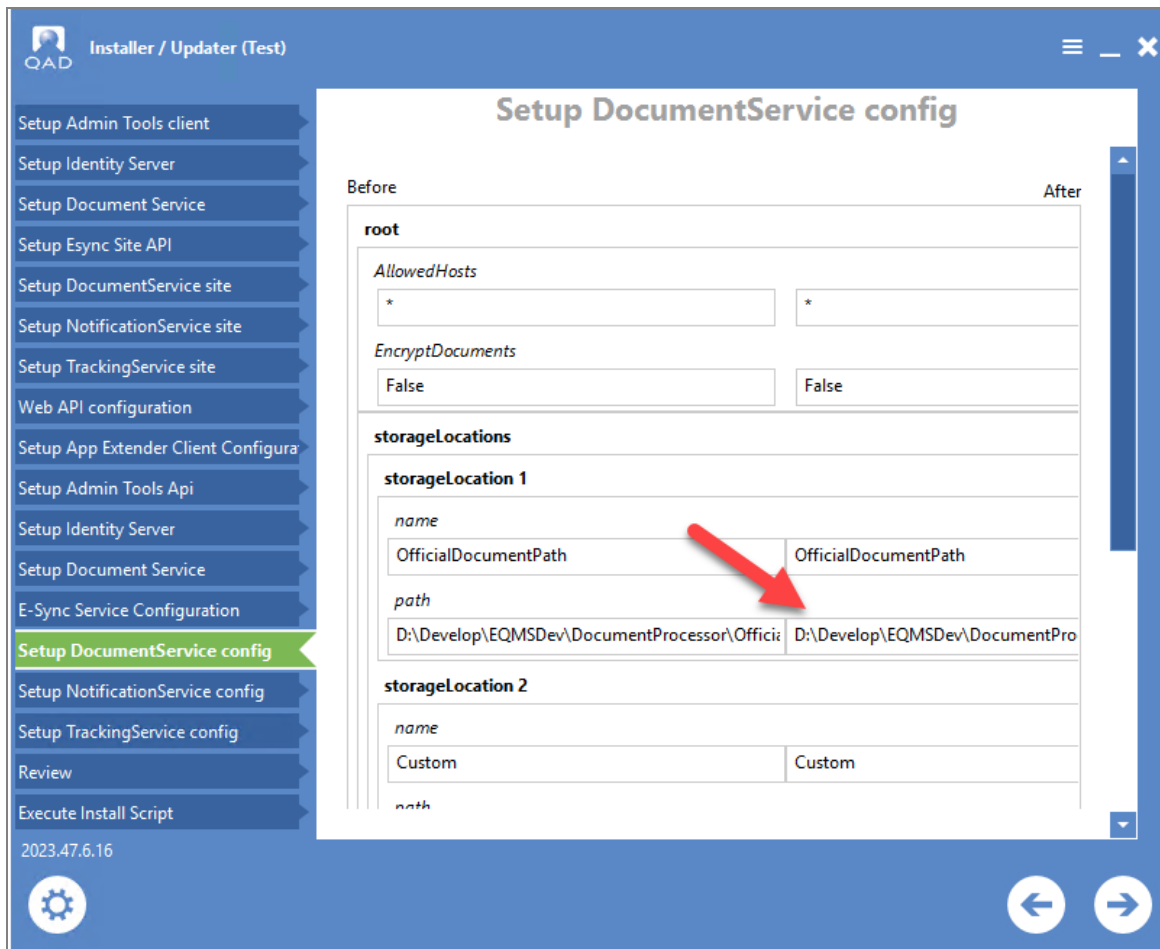
Set Up Identity Server

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



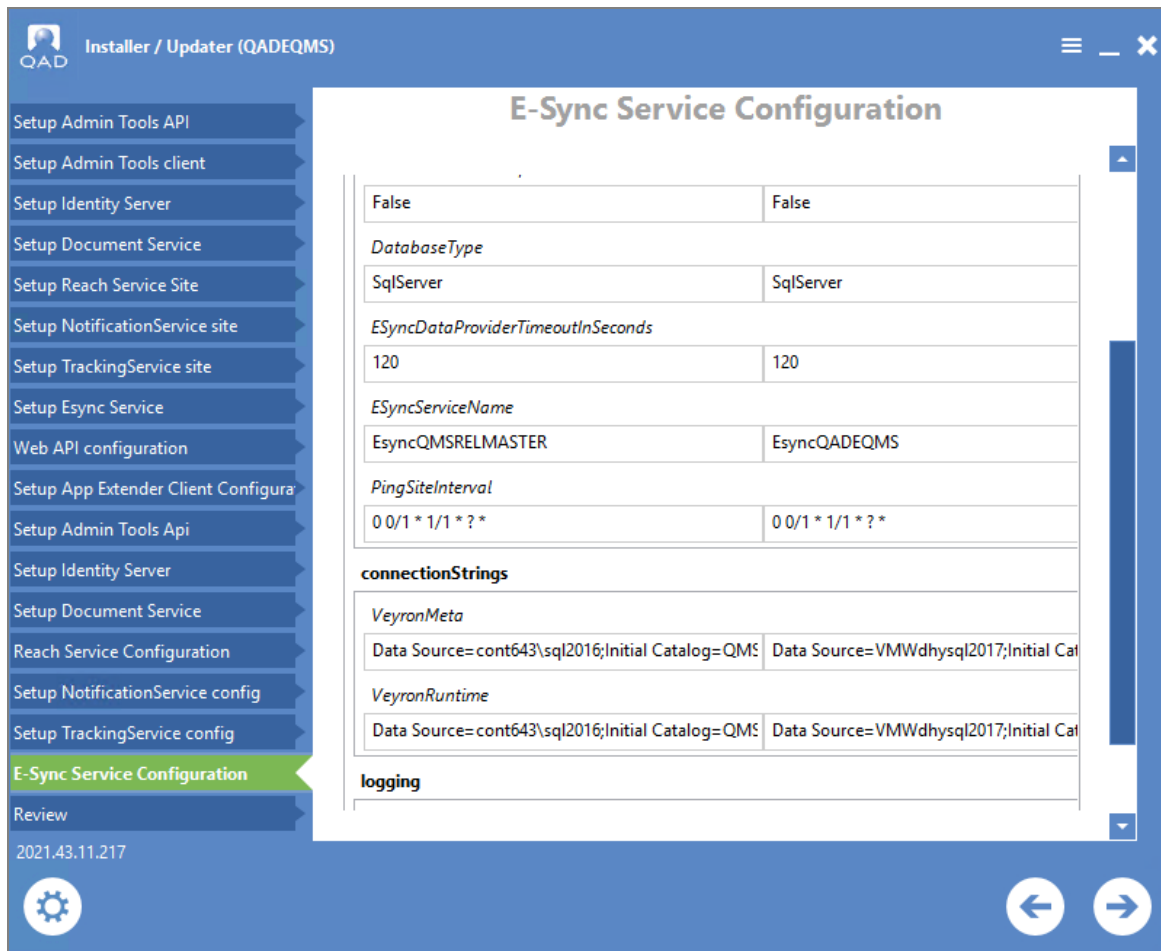
Set Up Document Service (File Storage Path)

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.



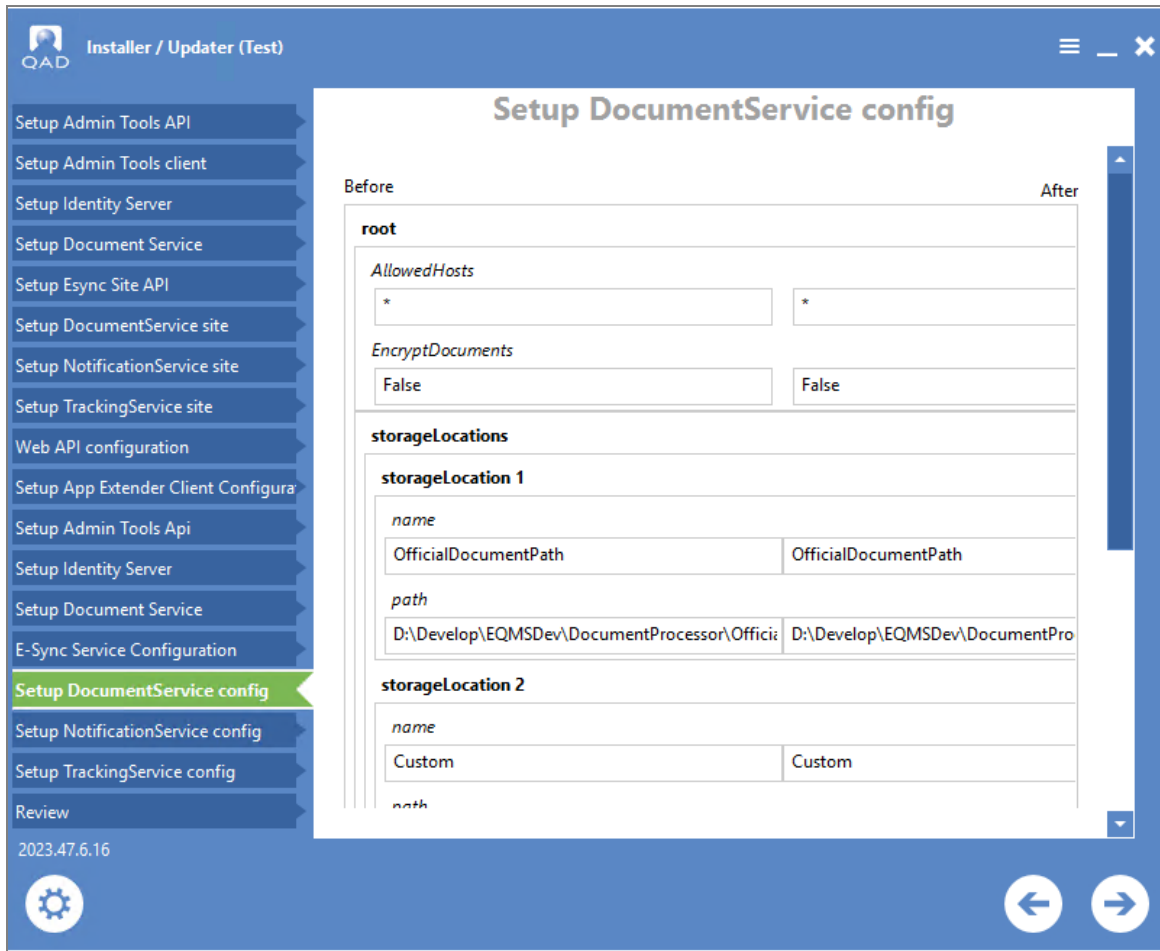
Esync Service Configuration.

Below is an example of how this should look.



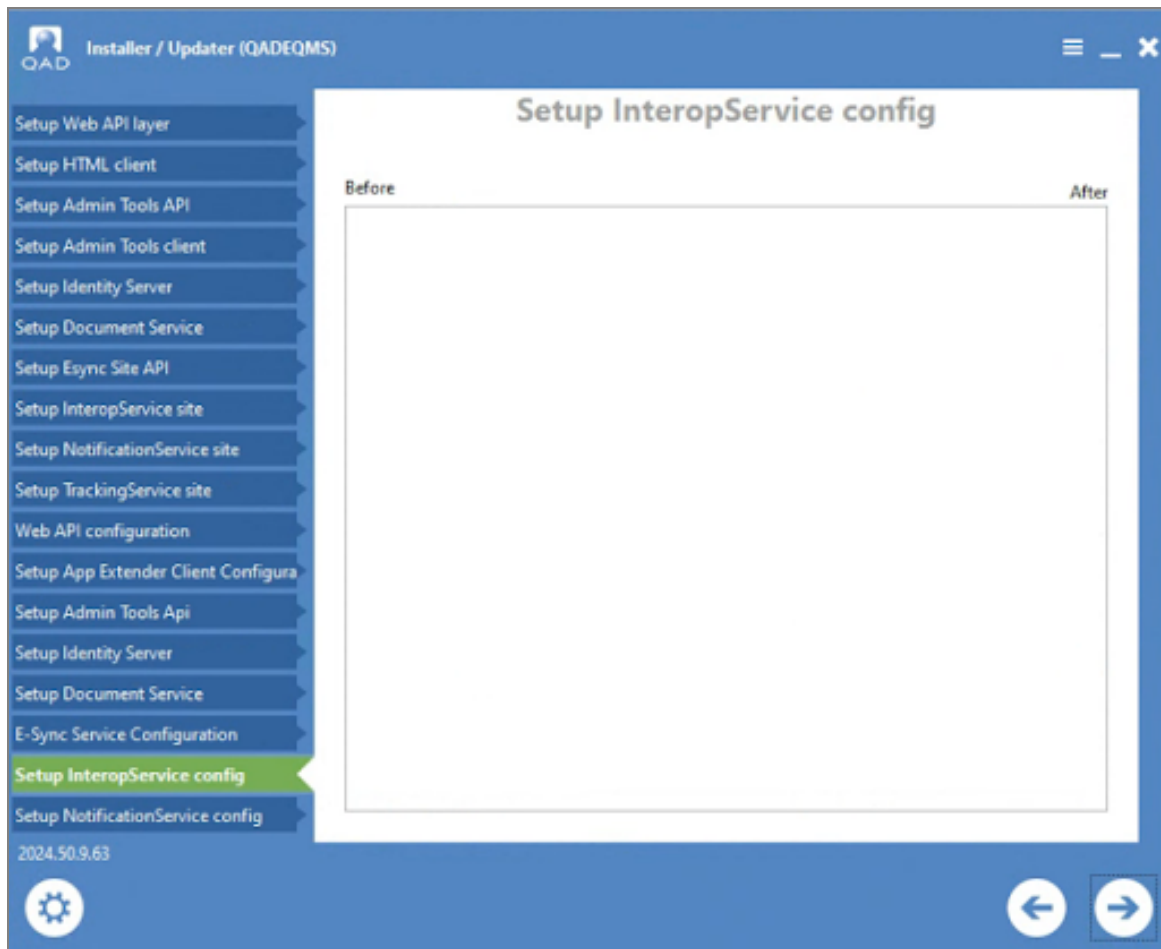
Set Up DocumentService Configuration

Below is an example of how this should look.



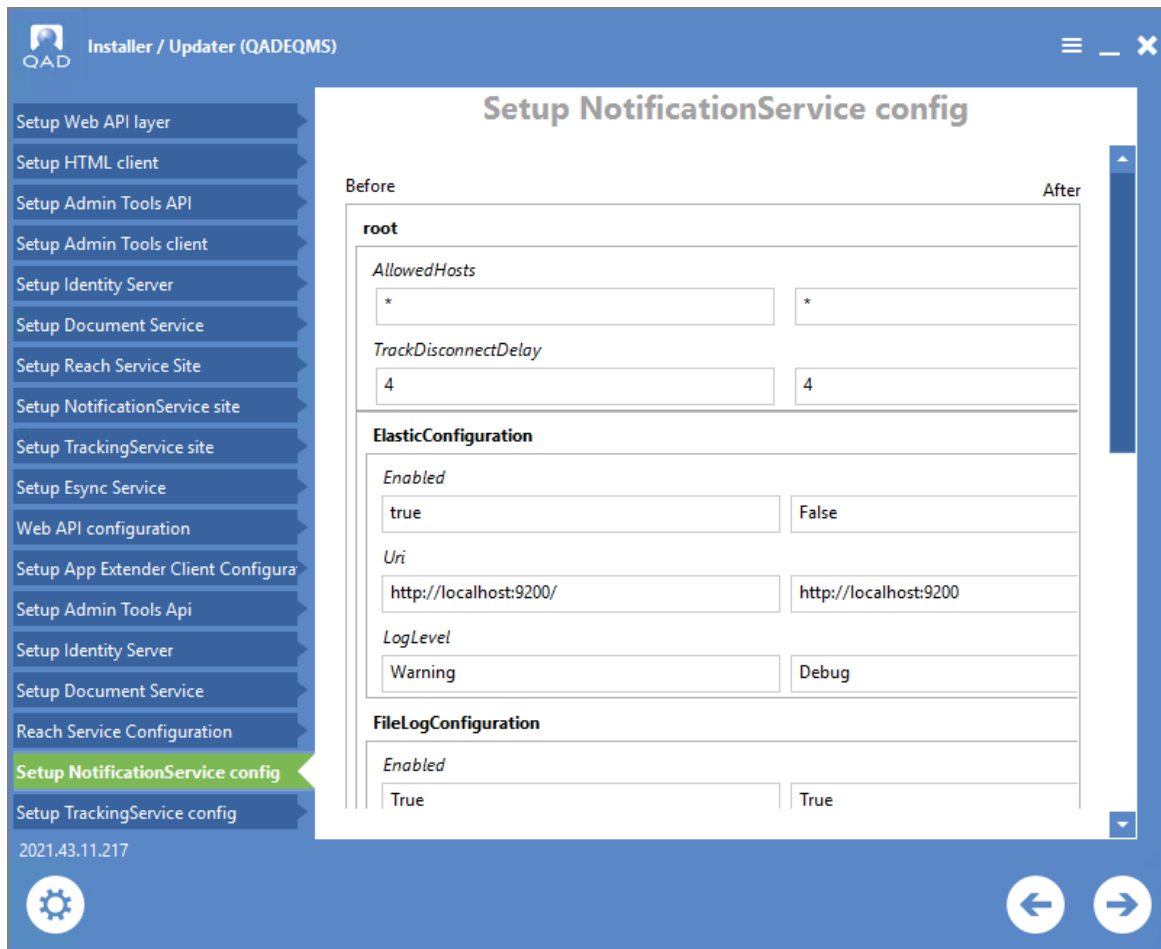
Set Up InteropService Configuration

Note that this is intentionally blank.



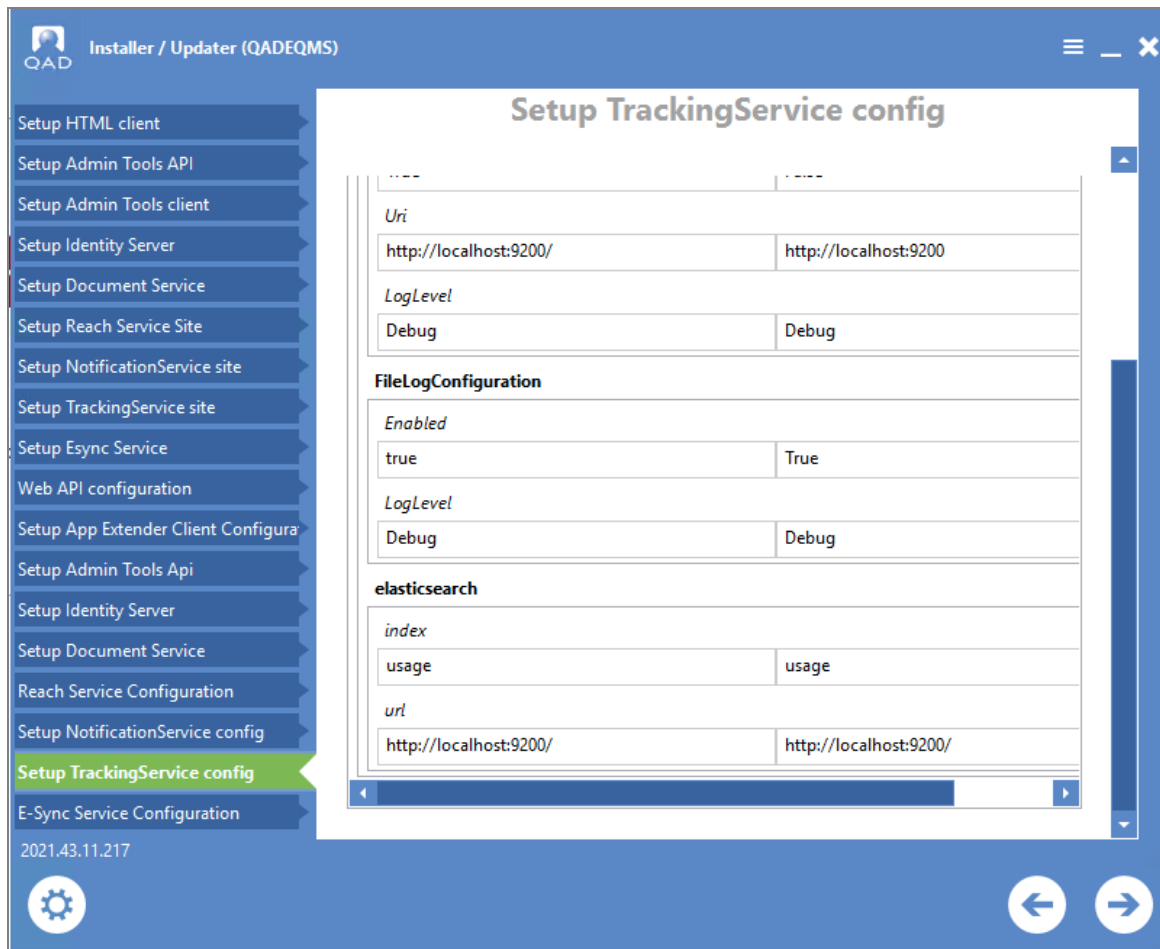
Set Up Notification Service Configuration

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



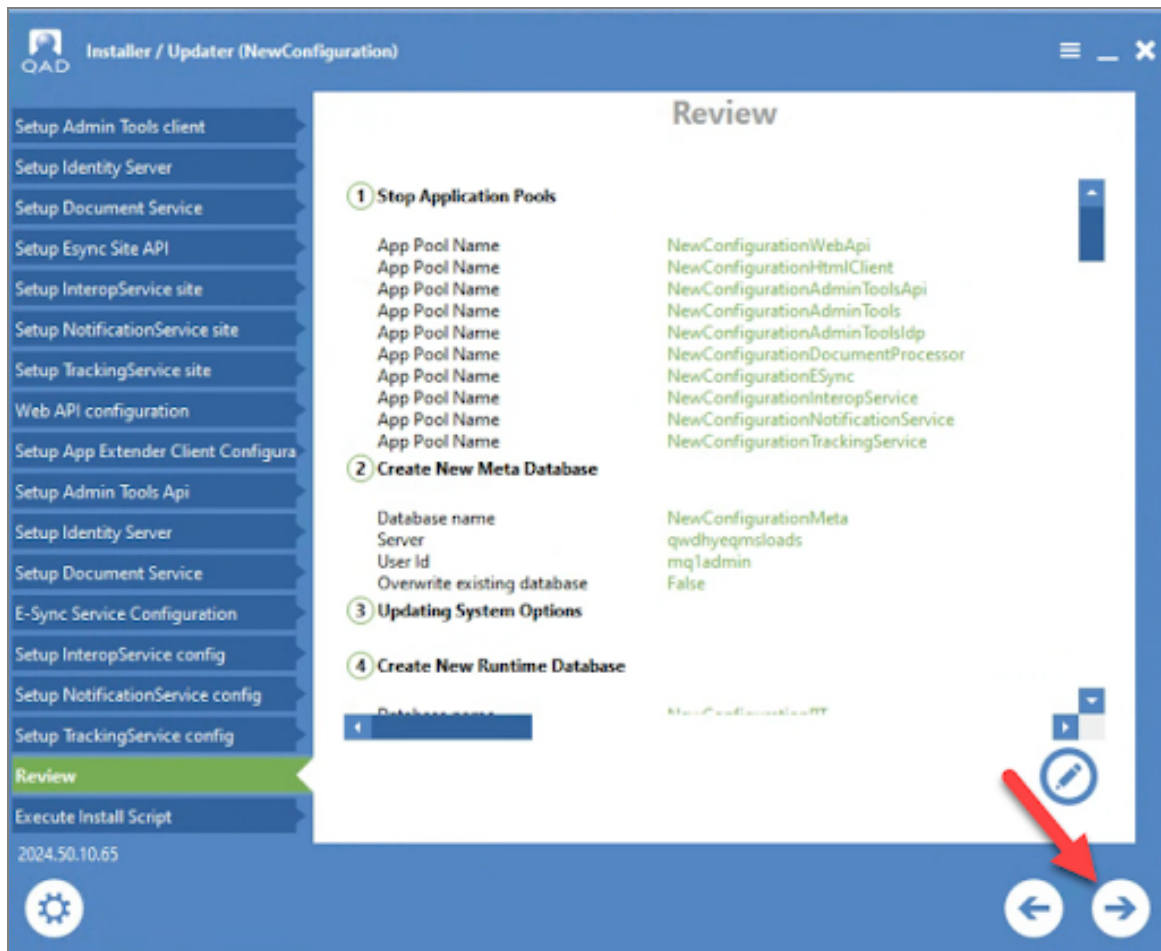
Set Up Tracking Service Configuration

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.



Chapter 4

Setting Up Email and LDAP

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Setup Email...45

Setup LDAP...45

Setup Supplier Account Creation Setup...46

Apply Life Science Strings...46

Apply Food and Beverage Strings...48

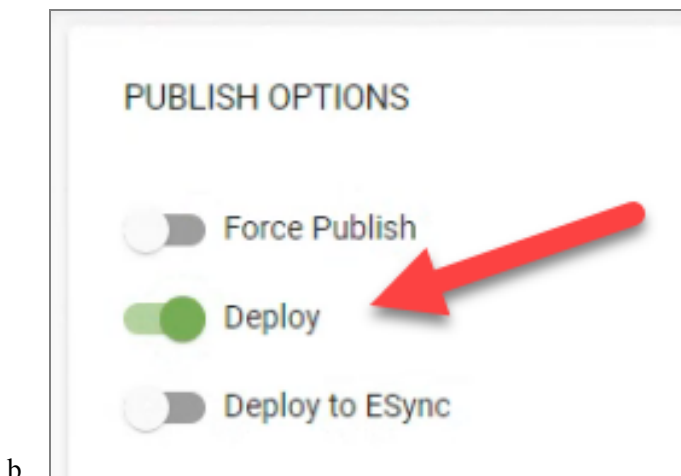
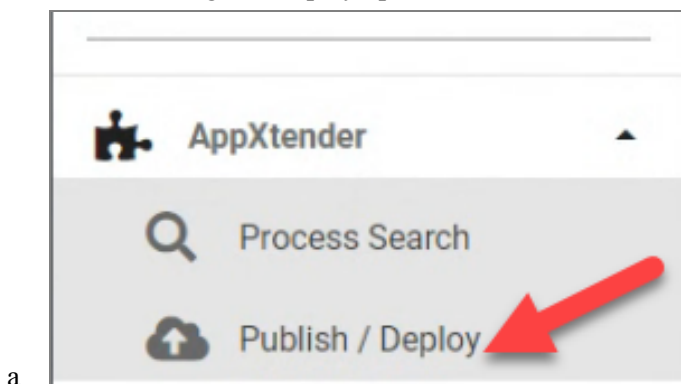
Update the SQL Login...50

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

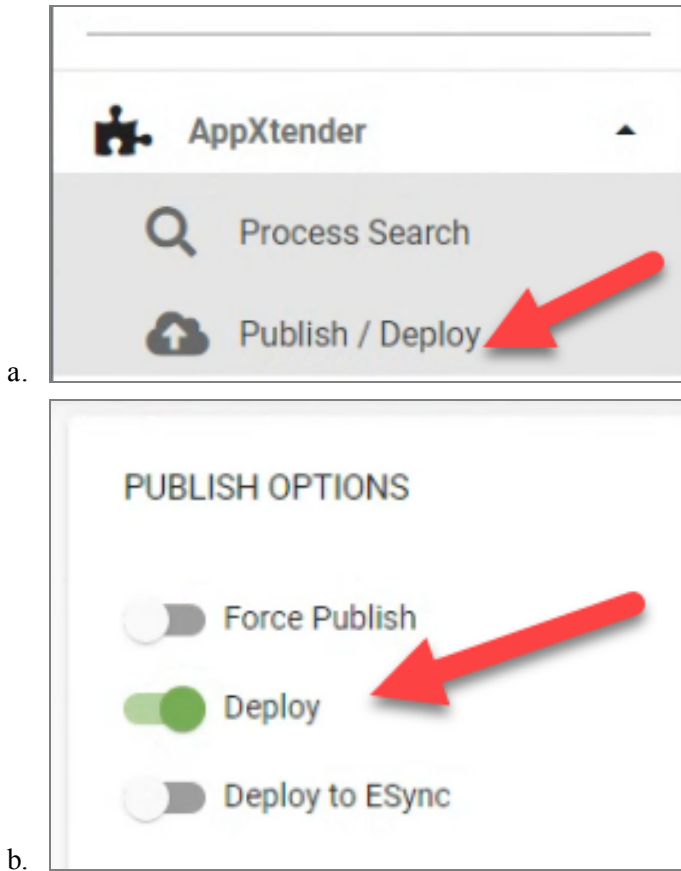
1. Log in to the Admintools site. The URL will look something like <https://your.qmssite.com/Admintools>
2. Expand the System Setup group from the navigation on the left and open the Email Setup screen.
3. Enter information into all applicable fields and click Save.
4. Use the Test Connection button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



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.



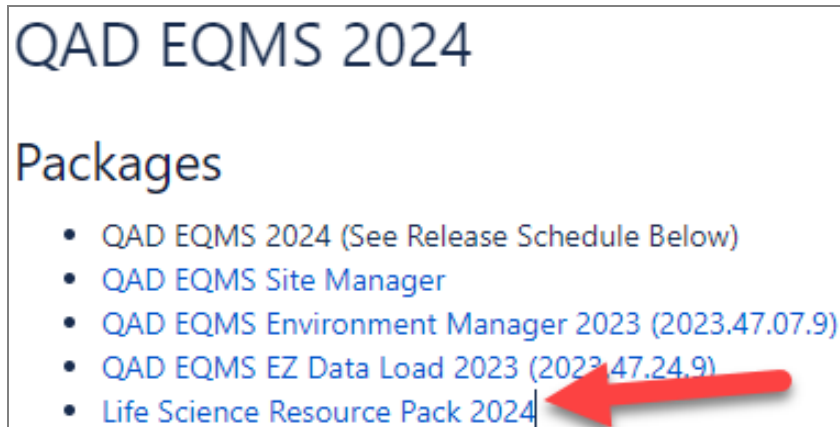
Setup Supplier Account Creation Setup

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 2025](#) and download the Life Science Resource pack.



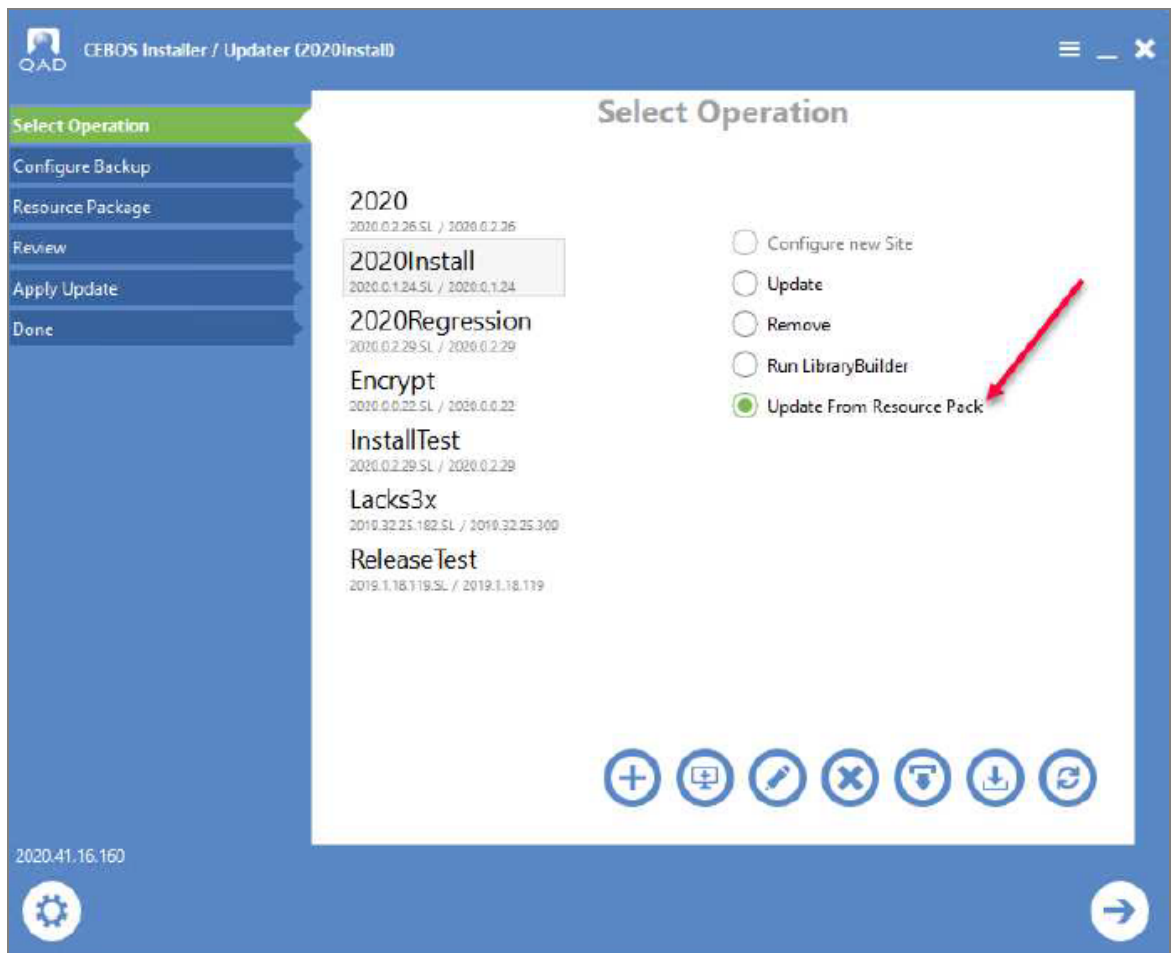
QAD EQMS 2024

Packages

- QAD EQMS 2024 (See Release Schedule Below)
- QAD EQMS Site Manager
- QAD EQMS Environment Manager 2023 (2023.47.07.9)
- QAD EQMS EZ Data Load 2023 (2023.47.24.9)
- **Life Science Resource Pack 2024**

a.

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



QAD CEBOS Installer / Updater (2020Install)

Select Operation

2020
2020.0.2.26.SL / 2020.0.2.26

2020Install
2020.0.1.24.SL / 2020.0.1.24

2020Regression
2020.0.2.29.SL / 2020.0.2.29

Encrypt
2020.0.0.22.SL / 2020.0.0.22

InstallTest
2020.0.2.29.SL / 2020.0.2.29

Lacks3x
2019.32.25.182.SL / 2019.32.25.309

ReleaseTest
2019.1.18.119.SL / 2019.1.18.119

Configure new Site

Update

Remove

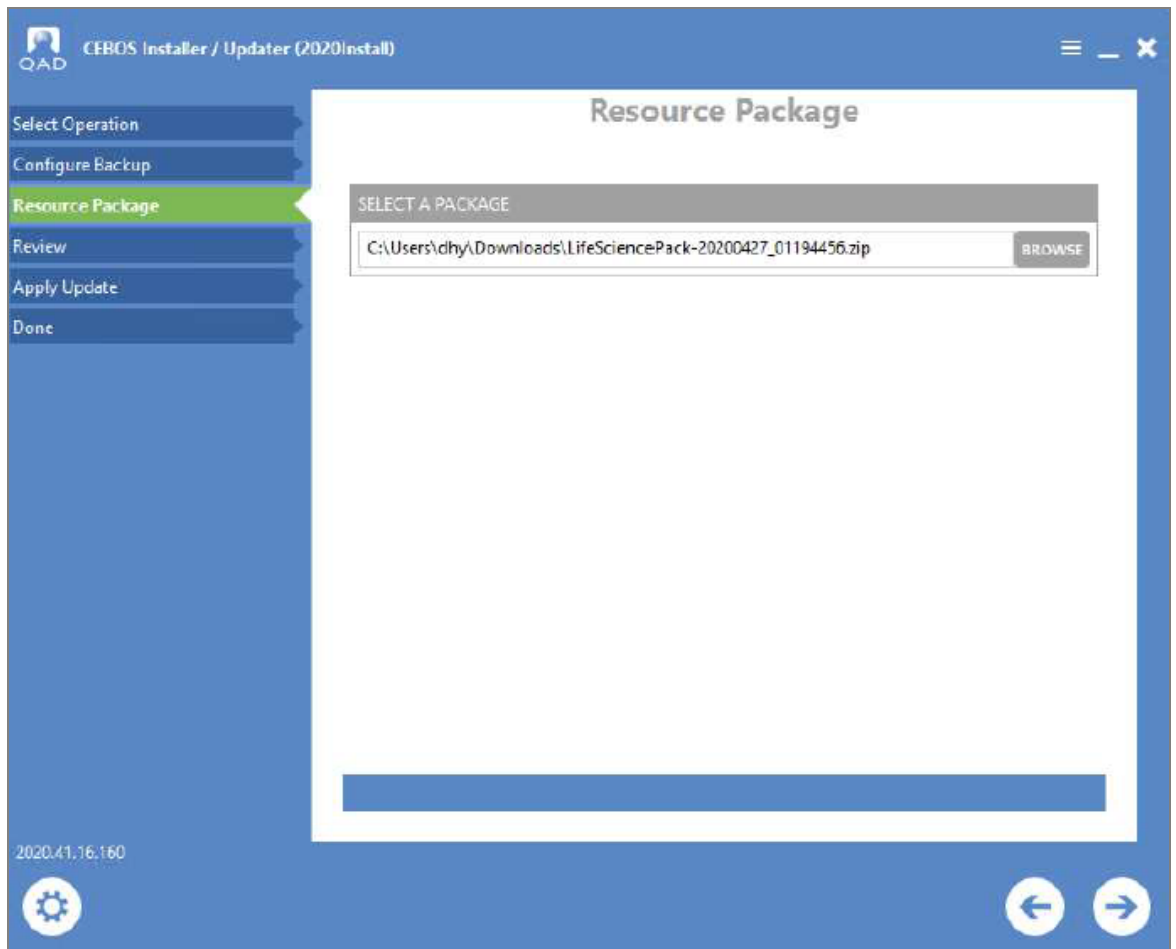
Run LibraryBuilder

Update From Resource Pack

2020.41.16.160

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.

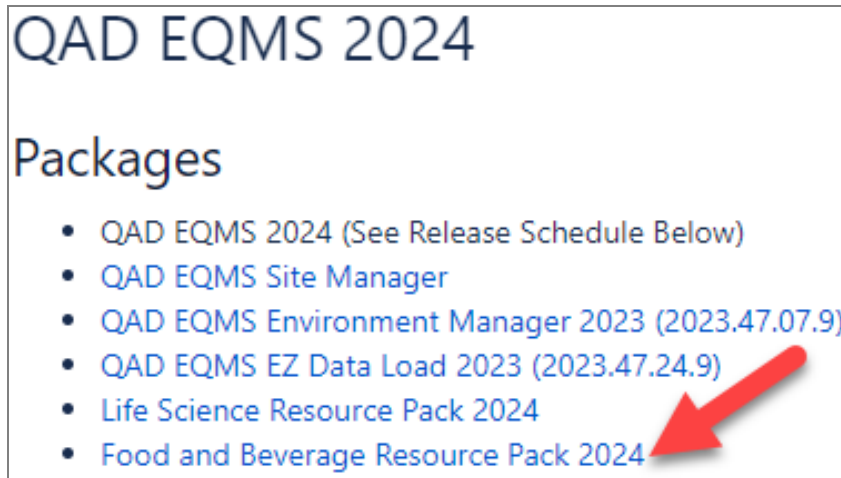


- a.
5. Click the next arrow on the review page and begin loading the Life Science Strings.
6. Once the operation is complete, log in to the Runtime Site and validate some of the strings. See the examples below.
 - a. APQP is now Design Control.
 - b. Process FMEA is now Process Risk Plan.

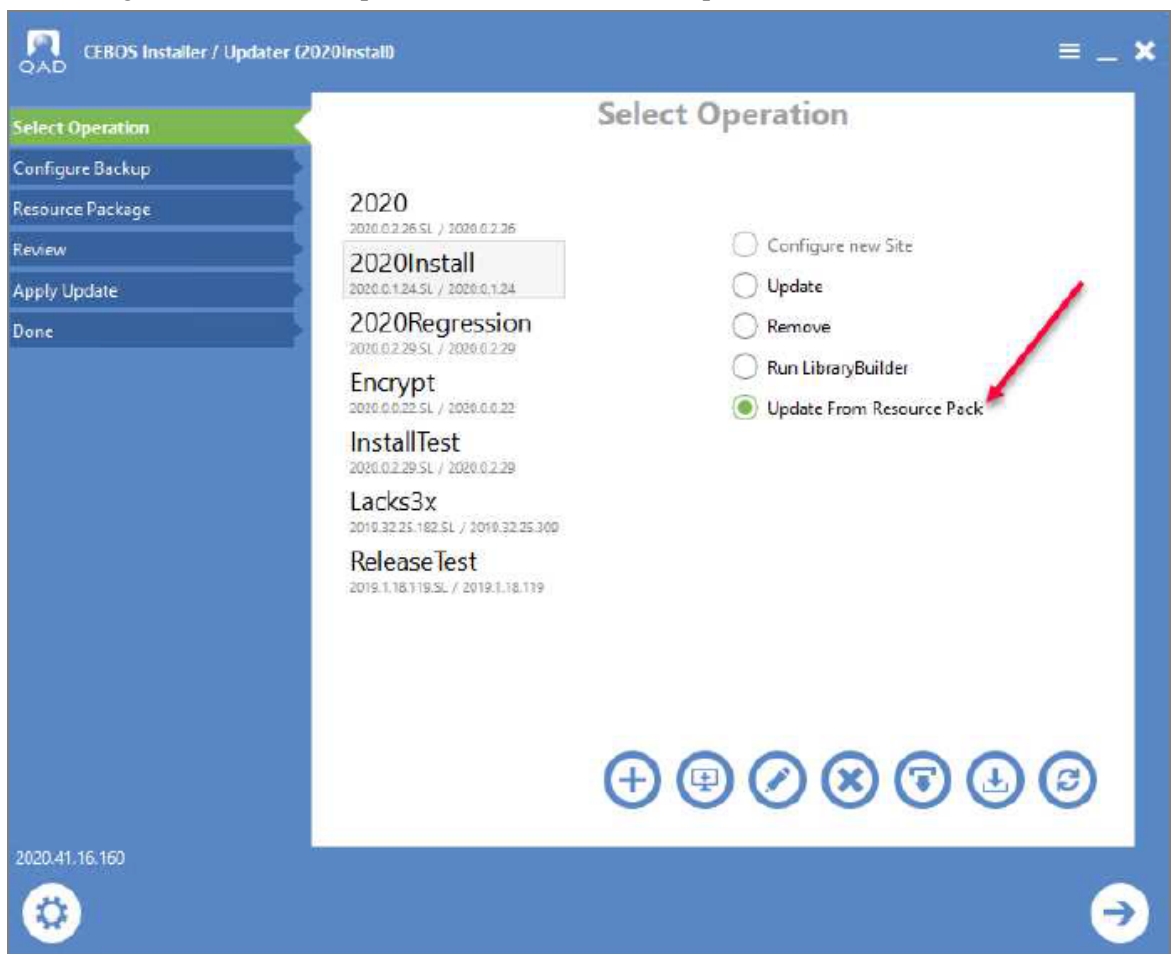
Apply Food and Beverage Strings

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.

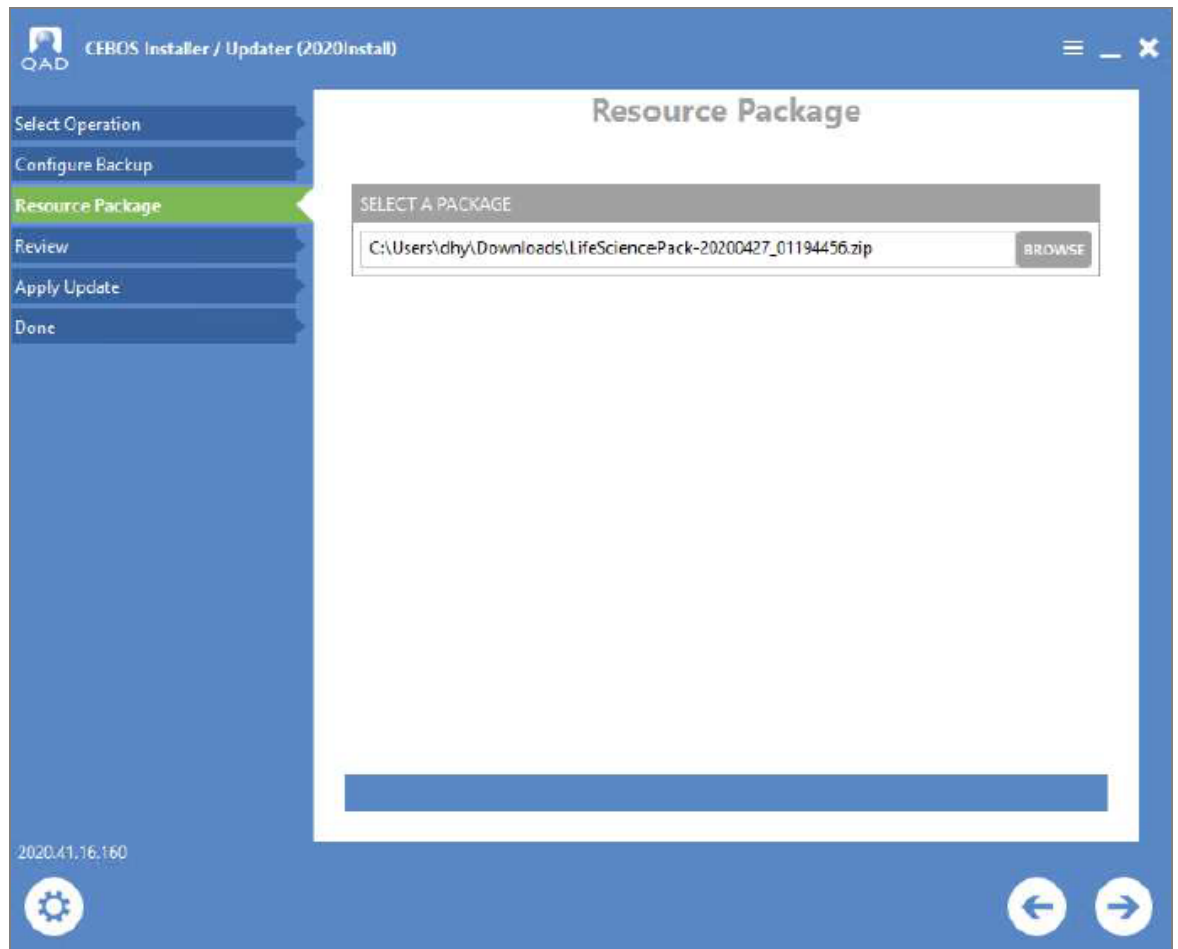
1. Go to [QAD EQMS 2025](#) and download the Food and Beverage Resource pack.



- 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.



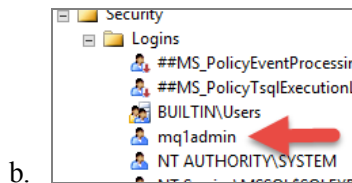
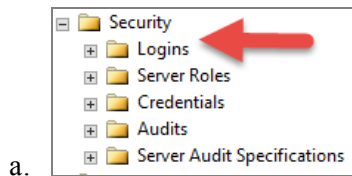
- a.
5. Click the next arrow on the review page and begin loading the Food and Beverage Strings.
 6. Once the operation is complete, log in to the Runtime Site and validate some of the strings. See the examples below.
 - a. APQP is now Design Control.
 - b. Process FMEA is now Process Risk Plan.

Update the SQL Login

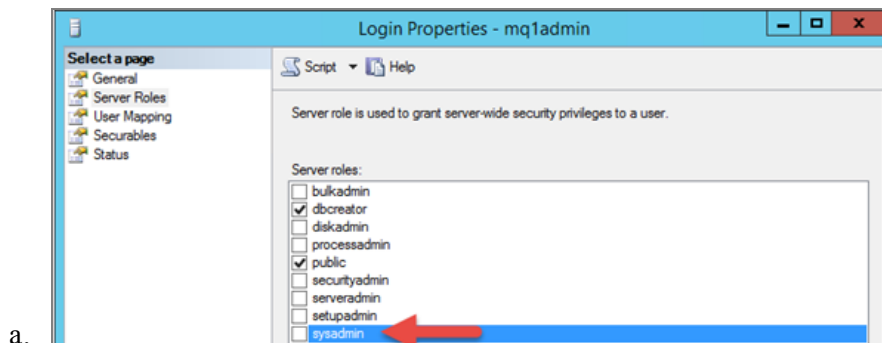
For Cloud installations, the SQL Login must be updated to remove certain permissions. The below instructions should only be executed if your policy prohibits third party applications from using a SQL login with sysadmin rights.

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

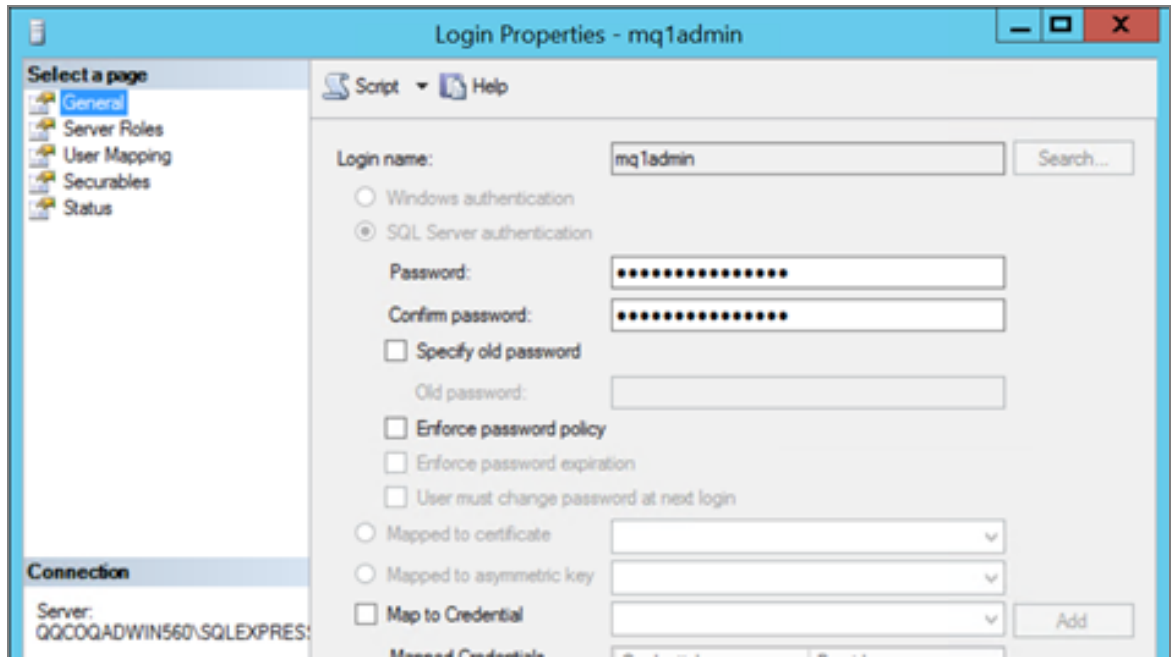
2. Expand the Security folder in SQL Server Management Studio and locate the SQL login.



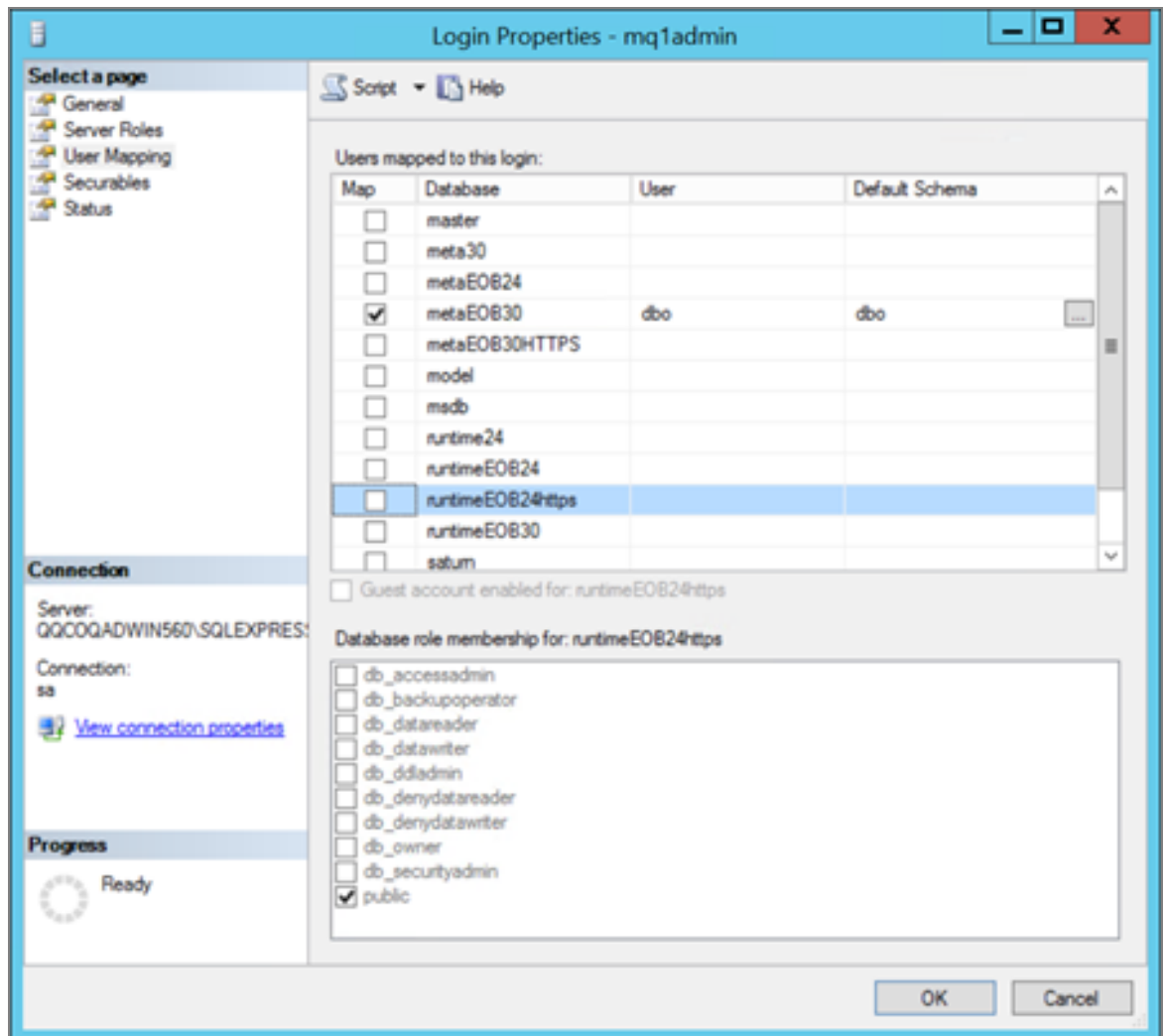
3. Open the login by double clicking, click Server roles, and remove the checkmark from the sysadmin checkbox.



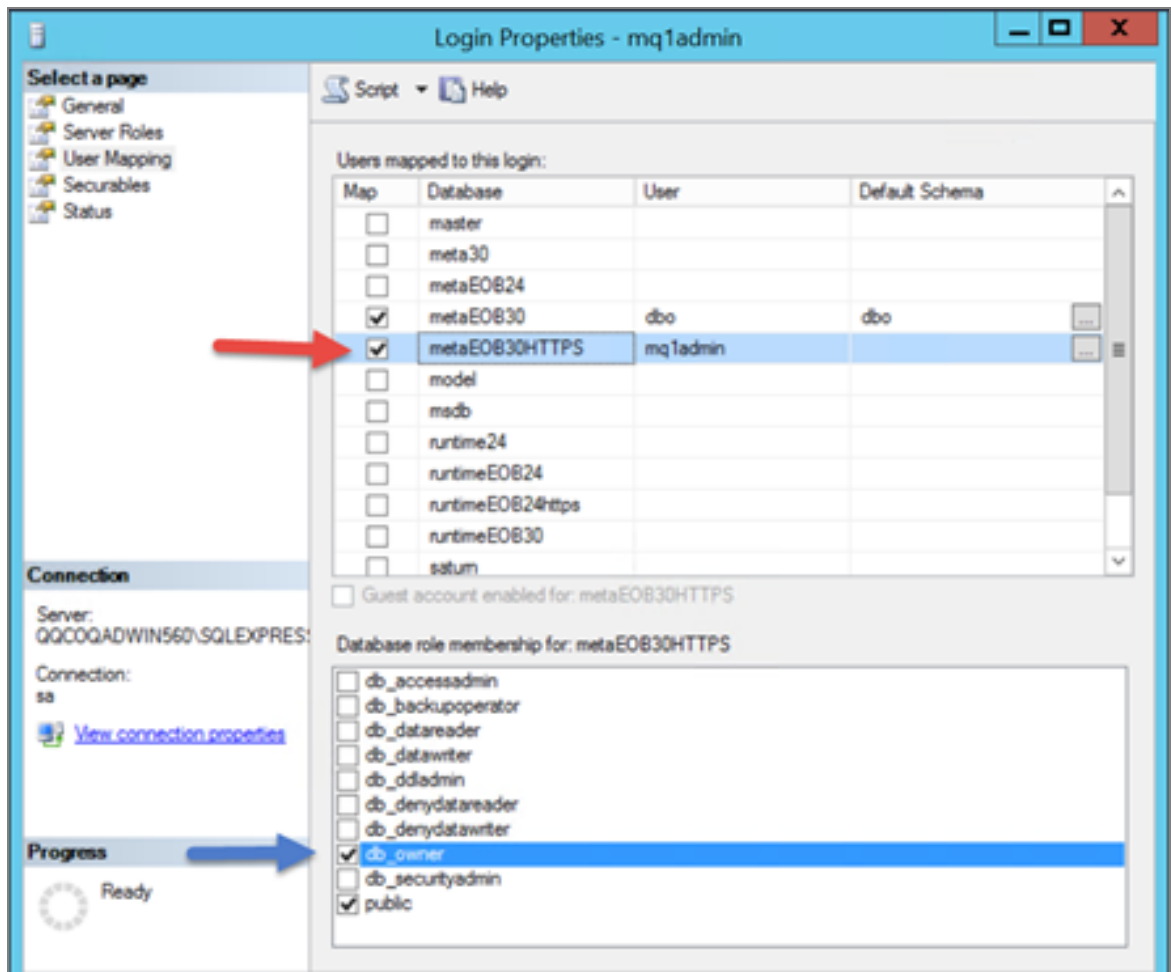
4. Add SQL login as DBOwner of Meta, Runtime, and IDP Databases.
 - a. Double-click the SQL login to bring up the Login properties.
 - b. Click User Mapping.
 - c. Select the check box next to the Meta, Runtime, and IDP databases and select db_ owner for each database.



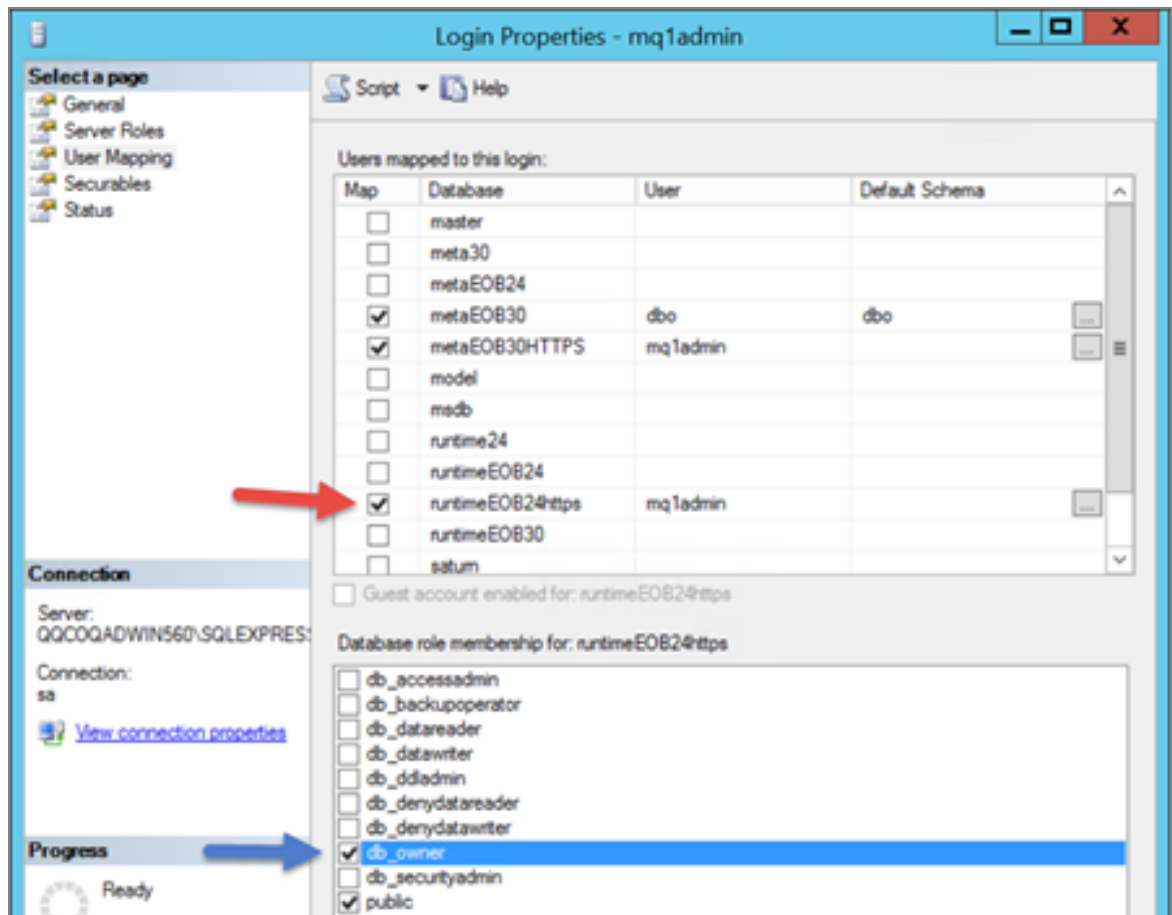
i.



ii.



iii.



iv.