



QAD EQMS

Version 2024.1 Release Notes

September 30, 2024

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Thank you!

This release includes features provided by several input sources including many of you, our customers. We thank all of our customers for entrusting us to build a great EQMS product and especially thank those customers we engaged with to dig deeper into the business problems, validate requirements, review mockups, and provide feedback during the development phases.

We are always looking for more customers to engage with us on new ideas. If you are interested in this process in general, please reach out to Brian Brooks (b3b@qad.com). If you are interested in a specific future feature, please find or log it in our [Idea Portal](#) and simply comment that you are interested in providing input. We expect you will find these changes provide value and less effort. We invite you to share your suggestions and up-vote others suggestions you think are intensely valuable in the [Idea Portal](#).

Thank you,

The QAD EQMS Team

Purpose

The document defines the release notes for the QAD EQMS suite.

Scope

The scope of this document is the version 2024 release. Incorporates module enhancements and platform updates.

Summary

This document describes the new and modified features of the QAD EQMS 2024.1. The change documentation is broken up by module and/or feature.

Impact Level

Low: Changes will have low impact on quality processes/system or minimal effort or training for users to understand/adapt to the system/changes.

Medium: Changes will have moderate impact on quality processes/system or moderate effort or training for users to understand/adapt to the system/changes.

High: Changes will have a high impact on quality processes/system extensive effort or training for users to understand/adapt to the system/changes.

Document Update

UG (User Guide) : This means that QAD has updated the User Guide to include this new feature/capability.

URS (User Requirement Specification): This means that QAD has added this new capability to the User Requirement Specifications.

Suggesting Future Improvement Ideas

To submit your ideas, please define not only your idea, but the business problem you are trying to solve, then review those ideas with the stakeholders within your company and submit them to our [Idea Portal](#).

Admin Tools\Extensibility

Administrative module for managing system setup, system administration, and accessing AppXtender, which is used to develop extensions and tailor your users' experiences.

ID	Feature Description	Field Updates	Impact Level	Document Update
MQ1ESM-2545	Added a Data Load Management menu item under Admintools - System Admin to create load sheets, validate data and load data into the system. It is capable of allowing data loading into nearly all processes and includes the ability to load into new extended fields. NOTE: this feature replaces the EZ Data Load tool.	NA	High	UG and URS

Administration

Basic QAD EQMS Administration

No changes.

APQP/Design Control/HACCP

QAD EQMS New Product Introduction and change management system with task and gate management. Also includes management of risk documentation (FMEA) and connections to other manufacturing documents like Process Flows, FMEAs and Control Plans.

ID	Feature Description	Field Updates	Impact Level	Document Update
QMSDEV-8106	Added embedded instructional video fields to Processes and Manufacturing Document - Work Instructions - e.g. Youtube or MP4 URL	Instructional Video field	Medium	UG and URS
QMSDEV-7724	Added Ability to track original (baseline), projected and actual dates on Projects, Gates, and Tasks	Project Level - Baseline Start Date, Baseline Finish Date Phase (formerly Gate) AND Task Level - Baseline Start Date, Baseline Finish Date, Actual Start Date, Actual Finish Date	Medium	UG and URS
QMSDEV-7755	New electronic Design History File (eDHF) primarily for Medical Device industry - build a DHF Template and use to build part specific eDHF	New Feature	Medium	UG and URS
QMSDEV-8136	AIAG APQP 3rd Edition - Phase 0 - Getting Started APQP Fundamentals 1) Document the Product Quality Planning team members and Supplier and Customer Contacts on the Projects (visible if either Supplier or Customer is specified)	Projects - Product Quality Planning Team Member(s), Supplier and Customer	Low	UG and URS

	<ul style="list-style-type: none"> 2) Added a Program Concept tab (visible if Customer is specified) with an APQP Risk Factors Checklist. 3) Added Customer or Internal Part No. field that populates and shows if Item and Customer are populated. 4) Added Revision Level field 5) Renamed Project Gates to Project Phases 6) Renamed Project Types to Project Templates 7) Added ability to create Manufacturing Document(s) from a Project 8) Added High Risk Supplier?, Sourcing Checklist and Historical Supplier Project(s) fields (all visible on Supplier Evaluation tab if Project Type = Supplier and Supplier is specified) 	<p>Contact(s), APQP Risk Factors Checklist, Customer or Internal Part No., Revision Level, Manufacturing Document(s), Create New Mfg Doc, Sourcing Checklist, High Risk Supplier?, Historical Supplier Project(s) fields</p> <p>Project Templates - Supplier Project? field</p>		
QMSDEV-8173	<p>AIAG APQP 3rd Edition - Phase 1 - Plan and Define</p> <ul style="list-style-type: none"> 1) Added the following fields for historical data to Projects - Plan and Define tab: Business Plan and Marketing Strategy Summary, Product/Process Benchmarking Summary, Product/Process Assumption Summary, Product Reliability Studies Summary, Customer Inputs Summary, Design Goals Summary, Reliability and Quality Goals/Requirements, 	<p>Business Plan and Marketing Strategy Summary, Product/Process Benchmarking Summary, Product/Process Assumption Summary, Product Reliability and Quality Summary, Product</p>	Low	UG and URS

	<p>Manufacturing Apportionment/Allocation Goals/Requirements, Program Risks (due to new tech, complexity, material, application, etc.), Capacity Planning Summary, Summary of Historical Information Relevant to the Project, Summary of Supplier-Related Historical Information, Historical Lessons Learned, Historical Customer Complaints, Historical Incident Investigations, Historical Non-conformances, Historical CAPAs, Historical SCARs</p> <p>2) Added ability to initiate Change Requests from a Project</p> <p>3) Added Customer Notification and Approval Required? and Evidence of Approval fields to Change Requests to document any customer approval (visible if Manufacturing Documents are linked)</p>	<p>Reliability Studies Summary, Customer Inputs Summary, Design Goals Summary, Reliability and Quality Goals, Reliability and Durability Goals/Requirements, Manufacturing Apportionment/Allocation Goals/Requirements, Program Risks (due to new tech, complexity, material, application, etc.), Capacity Planning Summary, Summary of Historical Information Relevant to the Project, Summary of Supplier-Related Historical</p>		
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		Information, Historical Lessons Learned, Historical Customer Complaints, Historical Incident Investigations, Historical Non-conformances, Historical CAPAs, Historical SCARs, Change Request(s) fields		
QMSDEV-8180	AIAG APQP 3rd Edition - Phase 3 - Process Design and Development 1) Added a Relevant Documentation field to Manufacturing Documents - Version Specific tab	Relevant Documentation field	Low	UG and URS
QMSDEV-8184	Control Plan 1st Edition: Control Plan Requirements and Guidelines 1) Notifies Manufacturing Document Owner when the Manufacturing Document moves to Awaiting Approval and there is a special characteristic on the Manufacturing Document - Specifications list that does not appear on the Control Plan. 2) If a Mfg Document PFMEA Failure Analysis record is linked to a DFMEA Failure Analysis item that has a severity of 9 or 10, the user must set the Special	Mfg Document Specifications: Utilized on Control Plan Mfg Document PFMEA Failure Analysis: Special Classification Drawing	Low	UG and URS

	<p>Classification field on the PFMEA Failure Analysis and Specifications Level.</p> <p>3) Added ability to define Specifications as a Pass-Through Characteristic - added a Pass-Through Characteristic field to Drawing Features, Library Specifications, Mfg Documents Specifications, Family Specifications</p> <p>4) Added an "Approval of Pass-Through Characteristic" field to Mfg Document Specifications to document customer approval of them</p> <p>5) Add ability to indicate if a Control Method is 100% Visual and, if so, document the method of periodic verification and responsibility.</p> <p>6) Added Interdependent Manufacturing Document(s) field to Manufacturing Documents - Version Specific tab. This can be used to link Rework Manufacturing Document to standard Manufacturing Document</p> <p>7) Added a Responsibility field to Reaction Plans to support the new requirement to include the responsibility for the reaction plan.</p> <p>8) Added a Safe-Launch field to Manufacturing Document</p> <p>9) Added Pre-launch and Safe Launch fields to Mfg Document PFMEA Controls to indicate which controls are pre-launch and/or safe launch</p> <p>10) Added Approval of Pass-Through Characteristics field to the</p>	<p>Features, Library Specifications, Mfg Documents Specifications, Family Specifications: Pass-Through Characteristic</p> <p>Mfg Document Specifications: Approval of Pass-Through Characteristic</p> <p>PFMEA Control Methods: Method of Periodic Verification, Responsibility</p> <p>Manufacturing Documents: Interdependent Manufacturing Document(s), Safe-Launch, Approval of Pass-Through</p>		
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	<p>Manufacturing Documents - Specification tab that will set the PTC approval on the Mfg Documents Specifications</p>	<p>Characteristics Reaction Plan: Responsibility Mfg Document PFMEA Controls: Pre-launch and Safe Launch</p>		
QMSDEV-8089	<p>Added Gantt Chart field to Project - Gantt Chart tab that will show the projected time and optionally the baseline timing.</p>	<p>Gantt Chart</p>	<p>Low</p>	<p>UG and URS</p>
QMSDEV-8091	<p>Added ability to link multiple Processes to a Specification Library</p>	<p>Replaced Process field on the links tab with Processes</p>	<p>Low</p>	<p>UG</p>
QMSDEV-8208	<p>Improved Drawing Features workflow in APQP:</p> <ol style="list-style-type: none"> 1) Drawing Features imported to Mfg Document Specifications merge with existing records where they match on Library Specification. 2) Fields on a new Drawing Features record default from analogous fields on linked Library Specification field. 3) When saving an existing Drawing Features record the first time after assigning a Library Specification, the fields are updated from the library record without overwriting non-null values. 4) New "Update From Library" command added to Drawing Features to overwrite fields from 	<p>Drawing Features: Update From Library</p>	<p>Medium</p>	<p>UG</p>

	<p>linked Library Specification record.</p> <p>5) Once a Drawing Features record is updated from the library for the first time, the command field "Update From Library" becomes visible.</p> <p>6) Inbox action sends to the manufacturing document's "Owner," linked "Family Template Owner," and "Item Group Approver" list when a record from the "Associated Drawing(s)" list starts a new draft. Notification is not sent if the related manufacturing document is in the "Obsolete" state.</p> <p>7) Label field appears to indicate tolerance mismatch with Drawing Features when tolerances are changed on a Mfg Document Specification.</p> <p>8) Specifications merged from library PFMEA Failure Analysis records take into account the possibility of Drawing Features.</p>			
ELMTDEV-10409	<p>Provide support for embedded videos on the following processes: Work Instructions - Instructional Video Processes - Instructional Video</p>	See item 1) to the immediate left.	Medium	UG and URS
QMSDEV-8279	<p>Transitioned the following image/picture fields to arrays for unlimited number of images: Items, Processes, Mfg Document Work Instructions, Issues</p>	None, transitioned them	Medium	UG and URS

Audits

QAD EQMS allows organizations to conduct or record internal or 3rd party audits or layered process audits and their findings.

No changes.

Common

Processes used across multiple modules.

No changes.

Complaint Management

QAD EQMS allows organizations to capture complaints from customers and manage them through completion. Triage and take action on the complaint and seamlessly escalate to NCR and CAPA or Supplier Corrective Action as required.

No changes.

Continuous Improvement

QAD EQMS allows users to easily create and manage projects from predefined templates. Work can be assigned and tracked for completion including the creation of issues with predefined selectable work flows to coordinate the completion of different types of tasks. Users can create meetings with predefined agendas and link to projects or issues for full task management and documentation of work.

No changes.

Document Control

QAD EQMS centralized repository for all documents and records with an approval and archive system.

ID	Feature Description	Field Updates	Impact Level	Document Update
ELMTDEV-1040 9	Provide support for embedded videos on the following processes:	See item 1) to the immediate left.	Medium	UG and URS
QMSDEV-8106	Manuals - Reference Video			

Gauge Management

QAD EQMS allows you to manage a schedule for internal or vendor calibrations and the results of those calibrations. R&R, Bias, and Linearity studies are also included.

ID	Feature Description	Field Updates	Impact Level	Document Update
ELMTDEV-10409	Provide support for embedded videos on the following processes:	See item 1) to the immediate left.	Medium	UG and URS
QMSDEV-8106	Gauge Calibrations - Reference Video			

General / Architecture / Structure

This section covers technical and general updates to the technology stack and the base functionality derived from the foundation that span across multiple modules.

ID	Feature Description	Field Updates	Impact Level	Document Update
ELMTDEV-10409	Provide support for embedded instructional videos	NA	Medium	UG and URS
ELMTDEV-12092	Converted the Image field type to an array of images to allow users to link 0 to n images to a record.	NA	Medium	UG and URS
QMSDEV-8116	Standardized the format of inbox items	NA	Low	UG
ELMTDEV-11241	Report state diagram time in the local users time (not in UTC)	NA	Low	UG
ELMTDEV-12041	Uplifted AdminTools application to same level of Node, Angular, and possibly Frontmaster as the normal UI	NA	Low	UG
ELMTDEV-12091	Added a link within the Help menu, which leads to the QAD Idea Portal	NA	Low	UG

Inspection & SPC

QAD EQMS Integrated inspection system driven directly from Control Plans with trending and capability analysis.

ID	Feature Description	Field Updates	Impact Level	Document Update
ELMTDEV-10409 QMSDEV-8106	Provide support for embedded videos on the following processes: Inspection Plans - Reference Video Inspection Events - Reference Video	See item 1) to the immediate left.	Medium	UG and URS

Integration

Changes or additions to standard integrations.

ID	Feature Description	Field Updates	Impact Level	Document Update
ELMTDEV-12284	Exposed Swagger information for the REST services to allow Services and customers to self-discover and integrate with those services. To access this use: <MyEQMSURL>/webapi/swagger.	NA	Medium	UG and URS

NCR & CAPA

QAD EQMS Non-conformance system that will allow you to track and action any kind of defect whether it be customer, supplier, or internal through an 8D process.

ID	Feature Description	Field Updates	Impact Level	Document Update
QMSDEV-8279	Transitioned the following image/picture fields to arrays for unlimited number of images: Quality Alerts, Deviations, Non-conformances, CAPA, Incident Investigations	None, transitioned them	Medium	UG and URS
QMSDEV-8140	1) Added the OSHA 300/301 tab (only visible if Incident Type is Death or Day away from work) to incident investigations to support the 300 and 301 reports	See item 1) to the immediate left.	Low	UG and URS

	<p>including fields: Case No., Date of Injury or onset of illness, Check if Event Time Cannot Be Determined, If Employee Died, When Did Death Occur?, Away From Work (days), On Job Transfer or Restriction (days), What Was the Employee Doing Just Before the Incident Occurred?, What Happened?, Describe the Injury or Illness, What Object or Substance Directly Harmed the Employee?, Where the Event Occurred, Employee's Name, Job Title, Male/Female, Date of Birth, Street, City, State, Zip, Date Hired, Time Employee Began Work, Name of Physician / Health Care Professional, Location of Treatment Facility (if off-site), Treated in an Emergency Room?, Hospitalized Overnight as In-Patient?, Facility Street, Facility City, Facility State, Facility Zip</p> <p>2) Created OSHA 300 and 300A on the Incident Investigation search screen and OSHA 301 report for the specific Incident Investigation records</p>			
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Risk Management

QAD EQMS Risk Management is an ISO 31000 compliant system to help actively manage risks in a living document. These can be risk assessments from any part of the business and risks are integrated directly into Change Management, New Product Introduction, and Supplier Management processes.

No changes.

Supplier Quality

QAD EQMS allows you to manage all aspects of supplier quality planning, preparation, requirements, and monitoring.

ID	Feature Description	Field Updates	Impact Level	Document Update
QMSDEV-6900	Supplier Corrective Action Request: Added Actions for SCARs in key States	None	Medium	UG
QMSDEV-8121	Supplier Corrective Action Request: Added Verification state to workflow	Verified By, Verified Date, Verification Method, Inspection Event, Verification Notes, Verification from Supplier Audits fields	Medium	UG
QMSDEV-6916	Created SCAR Report	None	Medium	UG and URS
QMSDEV-7961	Supplier Corrective Action Request: Created Approval steps for Containment	Containment Approval field	Low	UG
QMSDEV-7962	Supplier Corrective Action Request: Added field Supplier Problem Description	Supplier Problem Description field	Low	UG
QMSDEV-8141	Allow suppliers to document Occurrence, Escape, and Systemic Root Causes and Corrective Actions similar to CAPA	Escape Cause Notes, Occurrence Cause Notes, Systemic Cause Notes, Escape Corrective	Low	UG

		Action Plan, Occurrence Corrective Action Plan, Systemic Corrective Action Plan fields		
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Training Management

Integrated training compliance system allows automated management of your training requirements with succession development planning.

ID	Feature Description	Field Updates	Impact Level	Document Update
ELMTDEV-1040 9 QMSDEV-8106	Provide support for embedded videos on the following processes: Training Events - Instructional Video Skills - Instructional Video Training Event Logs - Video From Event	See item 1) to the immediate left.	Medium	UG and URS