QAD Adaptive Applications

User Guide

QAD EQMS Admin Tools: System Admin and Setup

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Admin Tools: System Admin and Setup
Change Summary

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

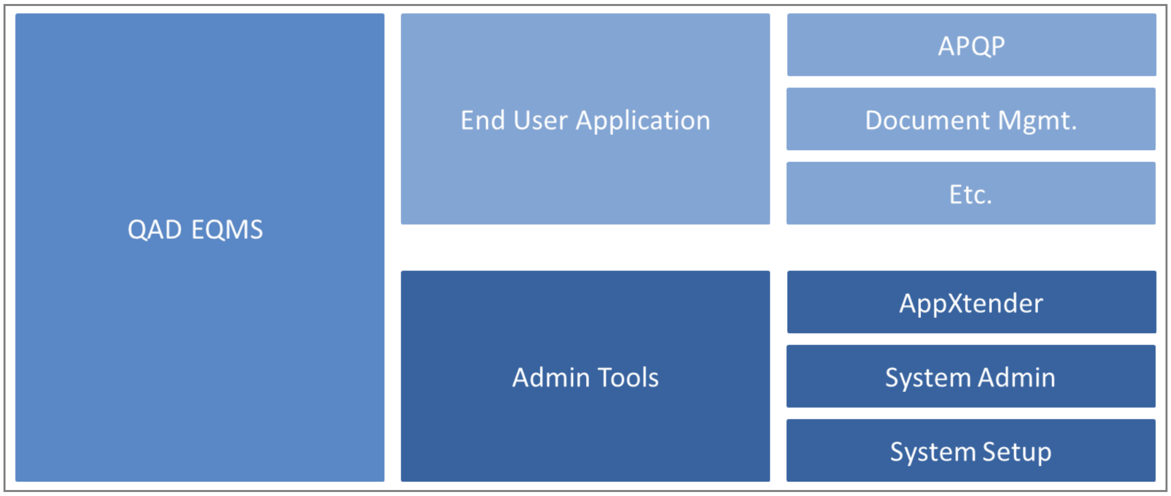
Date/Version	Description	Reference	Changed By
MAR 2020/v2020	Initial upload	--	RQT
JUNE 2021/v2021	Updated versioning	--	RQT
AUG 2021/v2021.1	Updated versioning; Added a section for Revision History	p. 19	RQT
MAR 2022/v2022	Updated versioning; Modified Account Management	p. 14	RQT
SEPT 2022/v2022.1	Updated versioning; Modified Dashboard Management; Modified Gadget Management; Added a section for Publish and Deploy; Added a section for Document Services Options; Added a section for Web.config Settings	p. 20, p. 32, p. 58, p. 53, p. 55	RQT
MAR 2023/v2023	Updated versioning; Added a section for Report Designer	p. 35	RQT
MAR 2024/v2024	Updated versioning; Added a section for Approval Options	`p. 54	RQT
SEPT 2024/v2024.1	Updated versioning; Added a section for Data Load Management	p. 39	RQT
MAR 2025/v2025	Updated versioning; Added a section for Responsibility Updater	p. 40	RQT

Chapter 1

Introduction

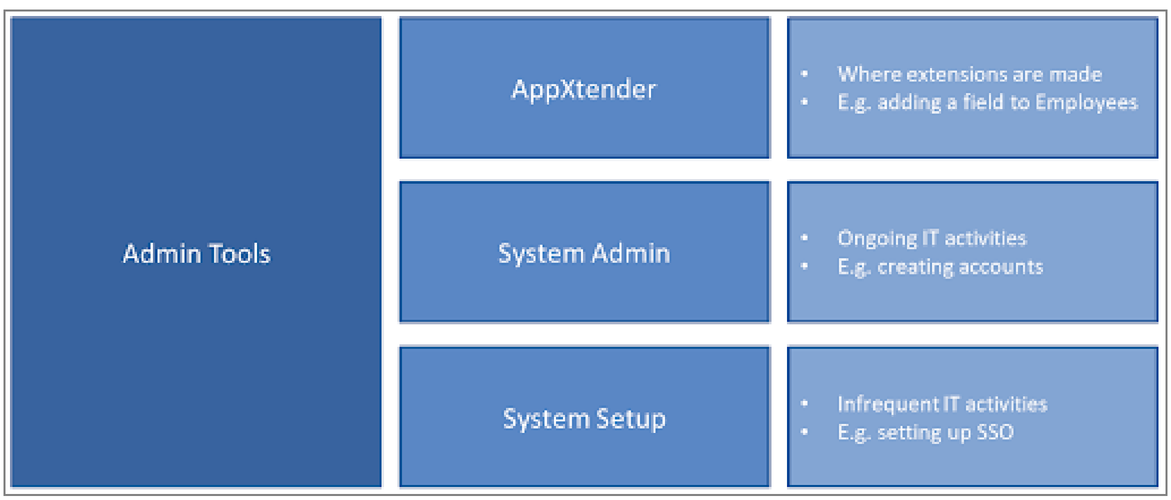
Overview

QAD EQMS is a suite of enterprise-wide quality management software that enables organizations to comply with management standard requirements. This system allows you to determine how to automate business processes, comply with quality and regulatory standards, and leverage the same data needed in multiple processes. This product comes with two applications tied directly together: the End User Application and Admin Tools.



The End User Application is the normal interface of the QAD EQMS solution. This web-based tool is where users access the full suite of QAD's EQMS applications such as APQP, Document Control, Audit Management, CAPA & NCR, Inspection & SPC, and more.

Admin Tools is a system intended for users to view and interact with the design and documentation of the End User Application. It contains three main modules: AppXtender, System Admin, and System Setup. This user guide focuses on System Admin and System Setup, which contain simple processes and IT activities that prepare the EQMS for use. As such, many of these processes are typically used just one time.



About This Guide

This user guide focuses on:

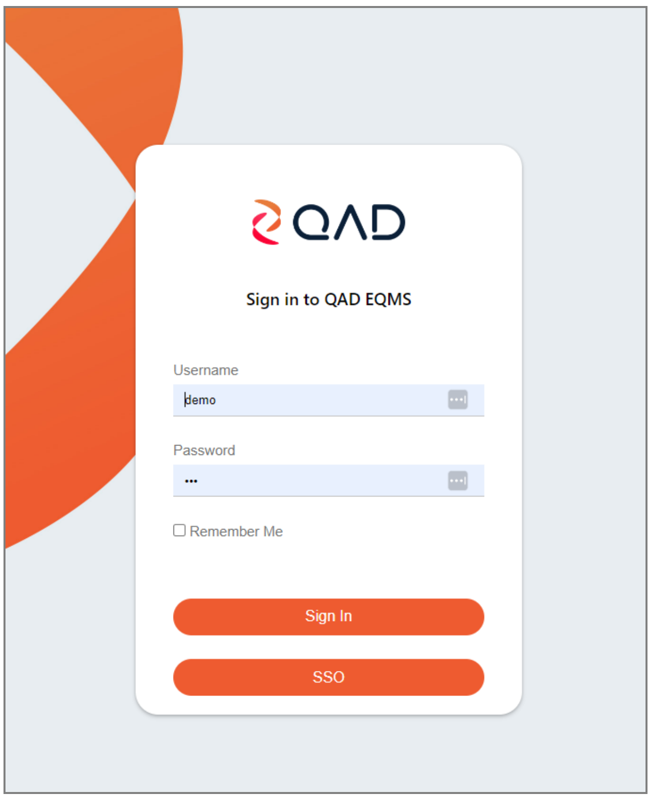
- Accessing the Admin Tools application.
- Layout of the Admin Tools application.
- Customizing the System Admin and System Setup modules.

Accessing Admin Tools

Admin Tools is a web-based application that can be viewed from many of today's popular browsers, including Firefox and Google Chrome. The Admin Tools website can be accessed through a direct URL link.

When you navigate to your company's Admin Tools website, the Login screen is displayed.

Fig. 1: Login screen



Use the Sign In panel to enter your specific credentials for accessing the application. Complete the following fields to access the system:

- **Username**. If you do not have a username, contact your system administrator to obtain one.
- **Password.** Your unique password.
- **Remember My Login.** Select this check box to have the website remember the username and password that you entered. By selecting this box, when you point your

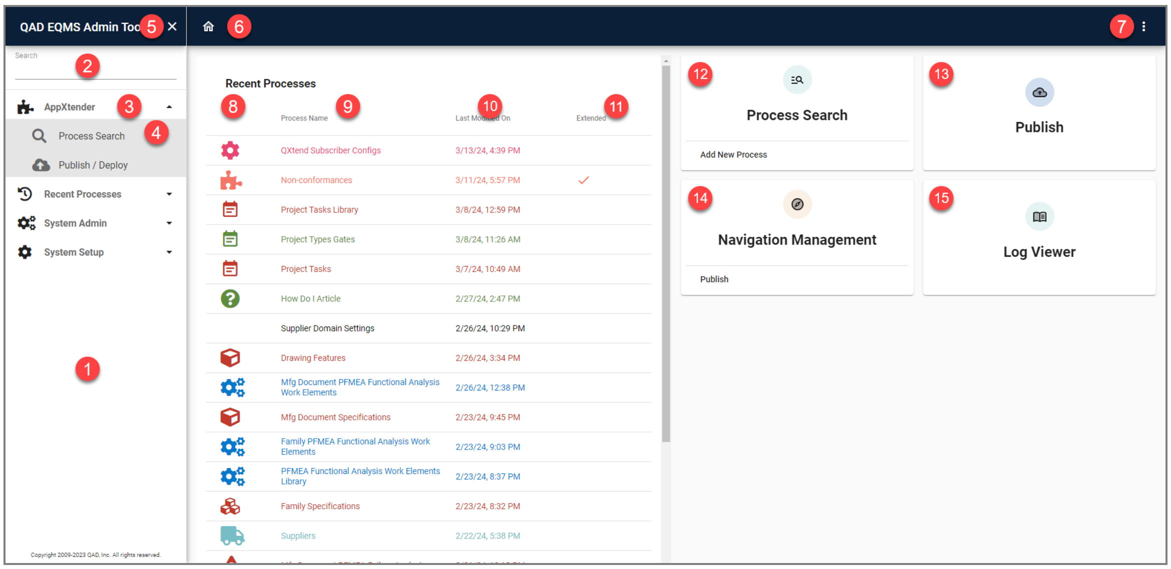
browser to the website, you will automatically be logged in to the application as long as your username or password have not changed.

Note: This is only saved on the current computer that you are using.

Click the Sign In button to access the application.

Admin Tools Desktop

Fig. 2: Desktop – Home



Navigation Panel

1. **Navigation Panel.** The navigation panel houses the action items available within the Admin Tools application. It is a tree-like structure organized by navigation groups, which can be expanded to display the navigation items beneath them. By default, the navigation panel is displayed in an expanded view.
2. **Navigation Search.** The search bar is used to limit the navigation groups and items and only show the items that match what have been typed.
3. **Main Navigation Group.** The navigation groups organize the Admin Tools functionality. Click the group to show the navigation items within the group. These can be expanded or collapsed by clicking the arrow on the right hand side.
4. **Main Navigation Items.** Clicking a navigation item opens a functionality in the display window. Each item performs a different functionality.
5. **Close/Show.** Click the X to close the navigation panel. When the panel is closed, click the Show  icon to expand the navigation panel into view.

Main Toolbar

6. **Breadcrumbs.** To the right of the navigation panel, a breadcrumb trail informs you of where you are within the system at any given time.
7. **Additional Options Menu** Click this menu to view the About page and to log out.

Recent Processes

8. **Application Icon.** The icon on each line item corresponds to the application to which each process belongs.
9. **Process Name.** The official name of the process.
10. **Last Modified On.** Displays the date and time when the record was last modified.
11. **Extended.** If the process is extended (i.e. modified) then the Extend icon displays in this column.

Easy Access Icons

12. **Process Search.** Opens the Process Search screen, which allows you to search for and open a specific process.
13. **Publish.** Opens the Publish dialog, which allows you to publish and deploy changes.
14. **Navigation Management.** Opens the Navigation Management screen, which allows you to set up the navigation menu layout and specify which processes and applications each security role can see.
15. **Log Viewer.** Opens the Log Viewer screen, which allows visibility into noteworthy events that may have happened to provide input when analyzing or troubleshooting the system.

Main Toolbar

The action icons in the main toolbar will vary depending on which process is open. However, the general anatomy remains the same. The figure below explains the different parts of this toolbar, including a list of action icons available to the System Admin and Setup navigation groups.

Fig. 3: Anatomy of the Main Toolbar

1. Show the navigation panel. This icon disappears if the navigation panel is expanded.
2. Displays the current process.
3. Save the current process.
4. Close the process editor.
5. Revert changes made for the current process.
6. Add a new item.
7. Publish the changes you made.
8. Open the Additional Options menu to view the About page and to log out.

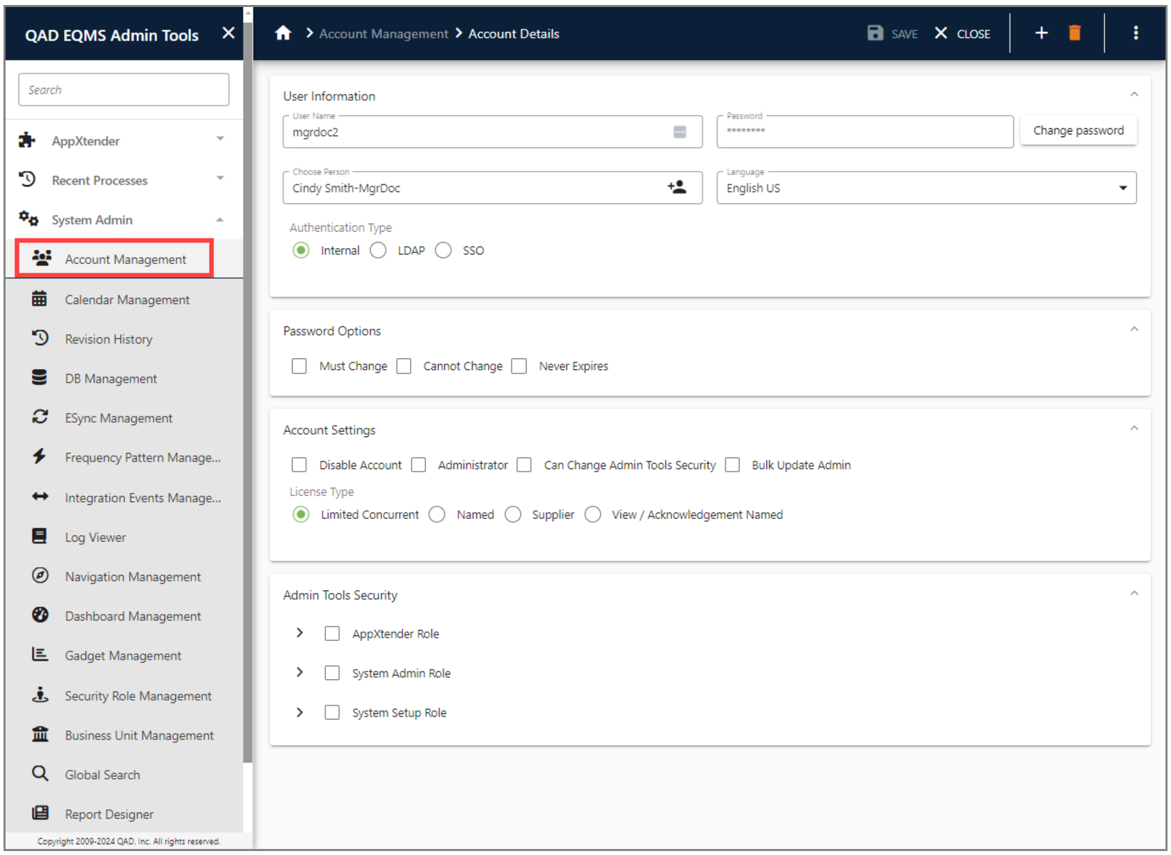
Chapter 2

System Admin

Account Management

Account Management allows you to create and modify user accounts for the end user application. In addition to standard user information like name and language, you can select the user's authentication and license types, set password expirations, disable the account, and enable administrator or elevated permissions.

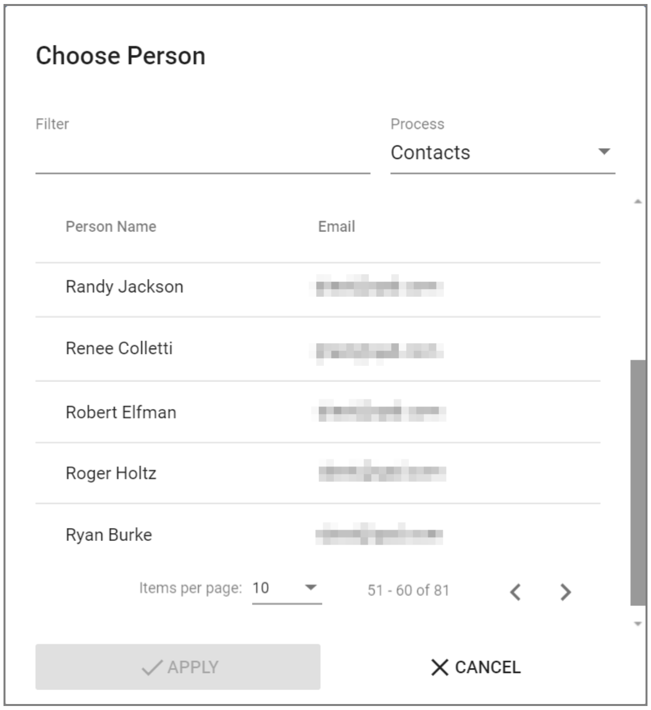
Fig. 4: Account Management screen



Adding a New Account

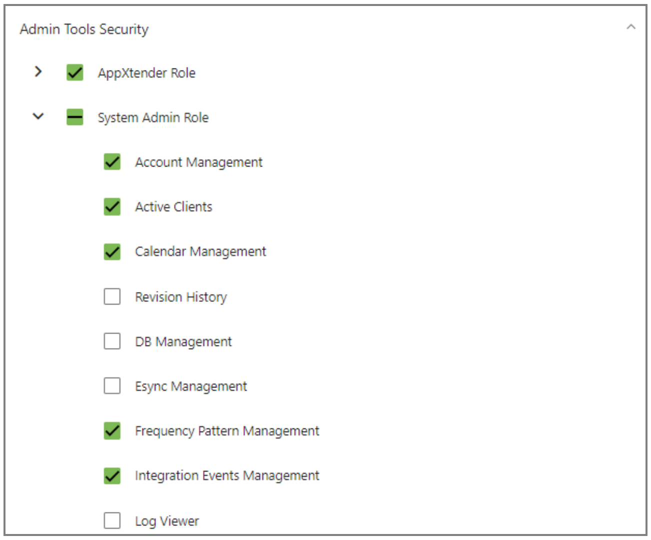
1. Navigate to the Account Management process and click the Add Account button in the contextual toolbar. A new account fills the display window.
2. Enter a user name and password.
3. Select a person to assign to this account.
    a. Click the Choose Person  button. A new window appears.
    b. Select the process containing the person's record (Base Person, Employees, or Contacts).
    c. Search through the list to find the person. You can use the Filter bar to limit results.
    d. Click the person's name to select them, then click Apply.

Fig. 5: Choose Person window



4. Select the default language for this account.
5. Select an authentication type:
   a. **Internal.** Only the password is required to sign in.
   b. **LDAP.** Lightweight directory access protocol. A username and password combination is validated with a directory server. If this option is selected, two new required fields appear: LDAP Username and LDAP Directory. These must be populated before the account can be saved.
   c. **SSO.** Single sign on. An authentication process that permits a user to access multiple applications with one set of login credentials. If this option is selected, approval must be specified as either Internal or LDAP.
6. If applicable, select one or more password options:
   a. **Must Change.** The password will expire.
   b. **Cannot Change.** The password cannot be changed.
   c. **Never Expires.** The password will never expire.
7. If applicable, select further account settings:
   a. **Disable Account.** The account is disabled and cannot be used until this option is de-selected.
   b. **Administrator.** If this option is selected, the user is set as an administrator for the end user application.
   c. **Can Change Admin Tools Security.** If this option is selected, the user can modify the Admin Tools Security check boxes. Select the highest level (e.g. System Admin) to automatically select all the items within that level. Alternatively, you can select items individually. Note that users who do not have this permission cannot see this check box.

Fig. 6: Admin Tools Security section

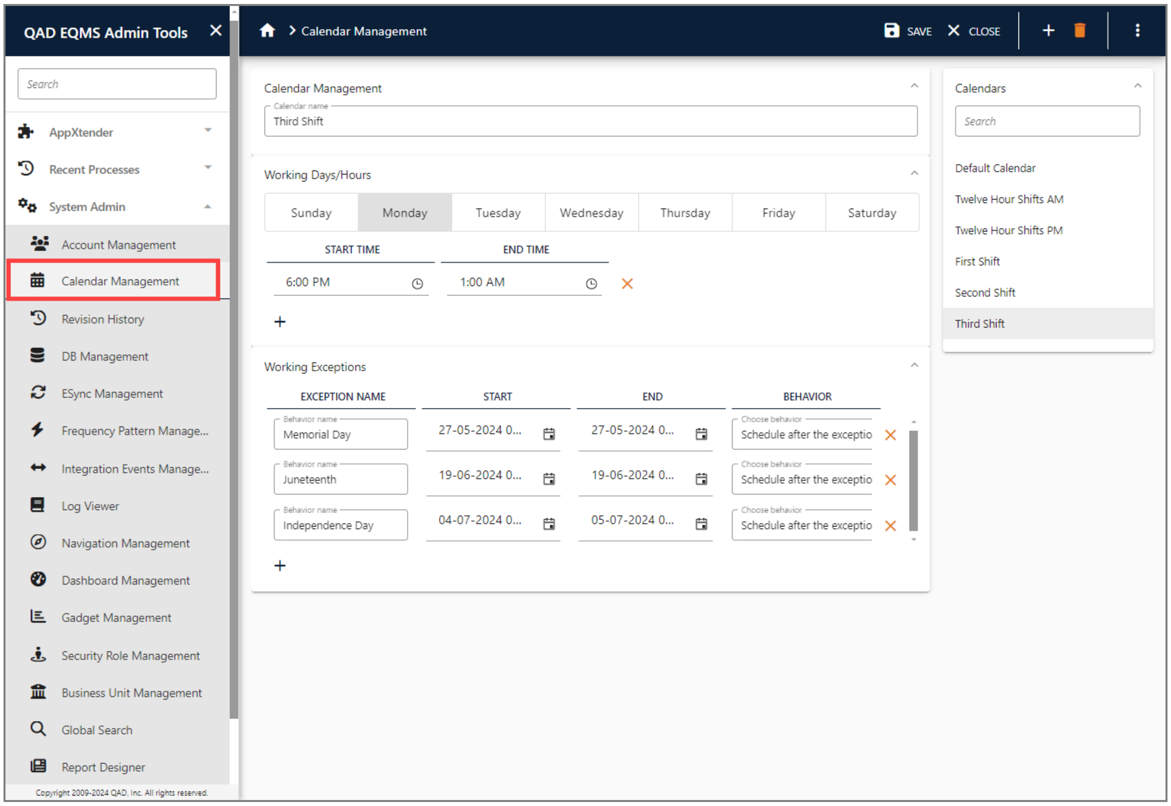


8. Select a license type:
    a. **Limited Concurrent.** The number of individual users who are concurrently accessing the Cloud Applications. Use of the software is limited to:
        i. Customer personnel viewing database records
        ii. Customer personnel completing any assigned approvals
        iii. Customer personnel completing Training Evaluation Questions
        iv. Customer personnel completing Inspection Events
        v. Customer personnel completing Audits
        vi. Customer suppliers viewing / modifying database records*
            - * Grandfathered for existing licenses, but replaced by Supplier Access for new customers
    b. **Named.** Each individual, device, or process that is permitted to perform an operation on a database or have access to an Add-On Product.
    c. **Supplier.** Denotes that this is a supplier contact user account, not to be used for internal users. This is used to support supplier tiered licensing.
    d. **View / Acknowledgment Named.** A Named User whose use of the software is limited to:
        i. Customer personnel viewing database records
        ii. Customer personnel completing any assigned approvals
        iii. Customer personnel completing Training Evaluation Questions
9. Select the Admin Tools security:
    a. **AppXtender Role.** User is allowed to extend processes and publish extensions.
    b. **System Admin Role.** User is allowed to modify system administration options.
    c. **System Setup Role.** User is allowed to modify system setup options.
10. Save the process.

Calendar Management

Calendar Management is used to define the working days, hours, and exceptions that make up the business calendar. Multiple calendars can be created to reflect different schedules or shifts.

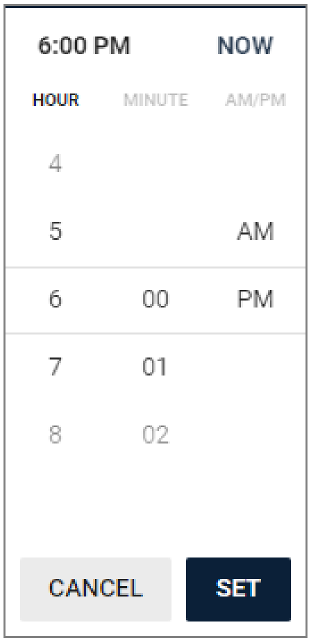
Fig. 7: Calendar Management screen



Adding a New Calendar

1. Navigate to the Calendar Management process and click the Add New Calendar button in the contextual toolbar. A new calendar fills the display window.
2. Enter a name for the calendar.
3. In the Working Days/Hours section, click the appropriate day of the week.
4. Click the Toggle Time List button in the Start Time/End Time fields. A new window opens.

Fig. 8: Toggle Time List window

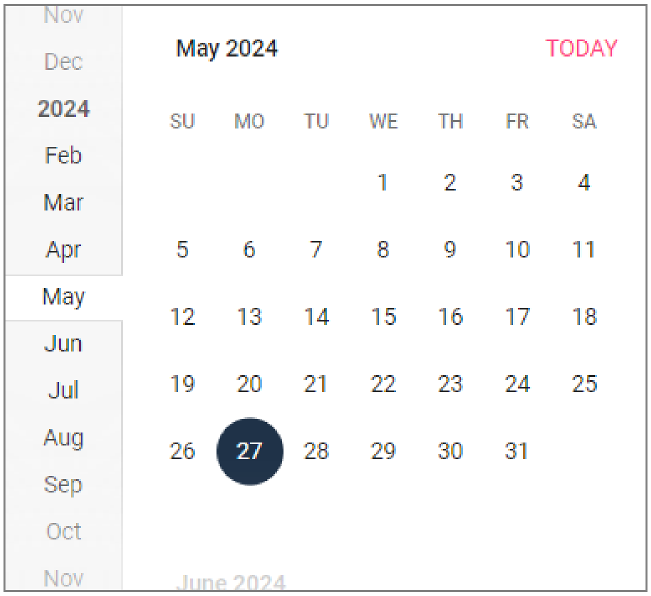


5. Scroll through the Hour, Minute, and AM/PM columns to set the time. Then, click Set.
    - Click "Now" to automatically select the current time.
    - Add additional start and end times for the same day by clicking the Add button on the main screen.
6. Repeat Steps 3-5 for each day of the week as appropriate.
7. Save the process.

Adding a Working Exception

1. In the Calendar Management screen, select the shift you want to modify.
2. In the Working Exceptions section, click the Add button. A new line appears.
3. Enter a name for the exception, such as the name of a holiday.
4. Click the Toggle Calendar button in the Start column. A new window appears.

Fig. 9: Toggle Calendar window



5. Select a month on the left, then select a specific date. You can also click "Today" to select the current date.
6. Click the time slot beside the date and enter a time.
7. Repeat Steps 4-6 in the End column.
8. In the Behavior column, select a behavior for events that are scheduled within the selected date parameters:
    - **Schedule after the exception.** The event will be scheduled during the first available moment after the exception.
    - **Schedule before the exception.** The event will be scheduled during the first available moment before the exception.
    - **Skip the scheduled item.** The event will not be scheduled.
9. Save the process.

Revision History

When a change is made and published within the Admin Tools website, that change is logged in the Revision History process. This history log is view-only, however, you can click the Open button on any line item to see additional details about the change. You can also filter results using the Filter Revisions field at the top.

Change entries are often automatically assigned tags containing publishing details. You can add custom tags within the revision history detail screen by clicking the Tag icon in the main toolbar.

Fig. 10: Revision History screen

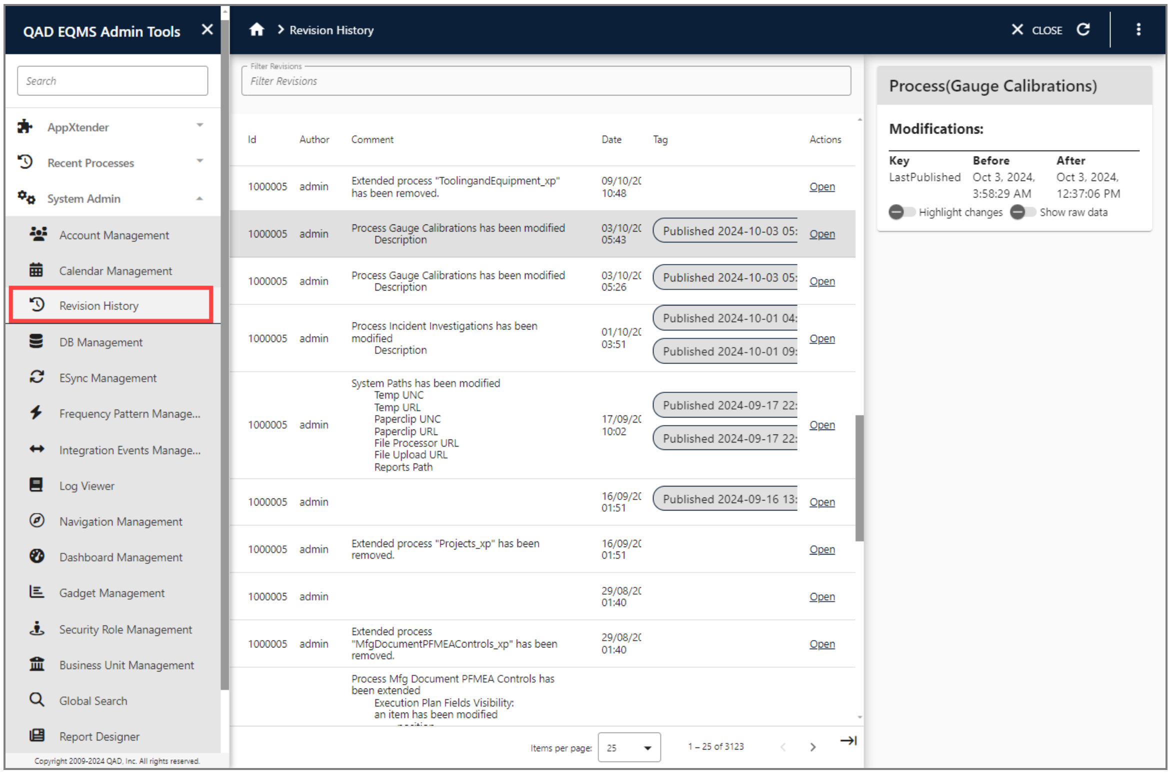
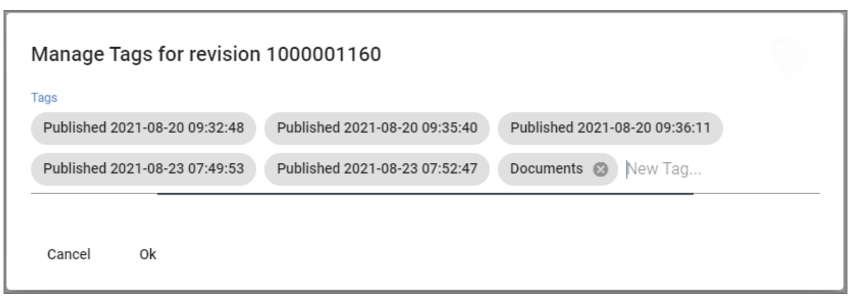


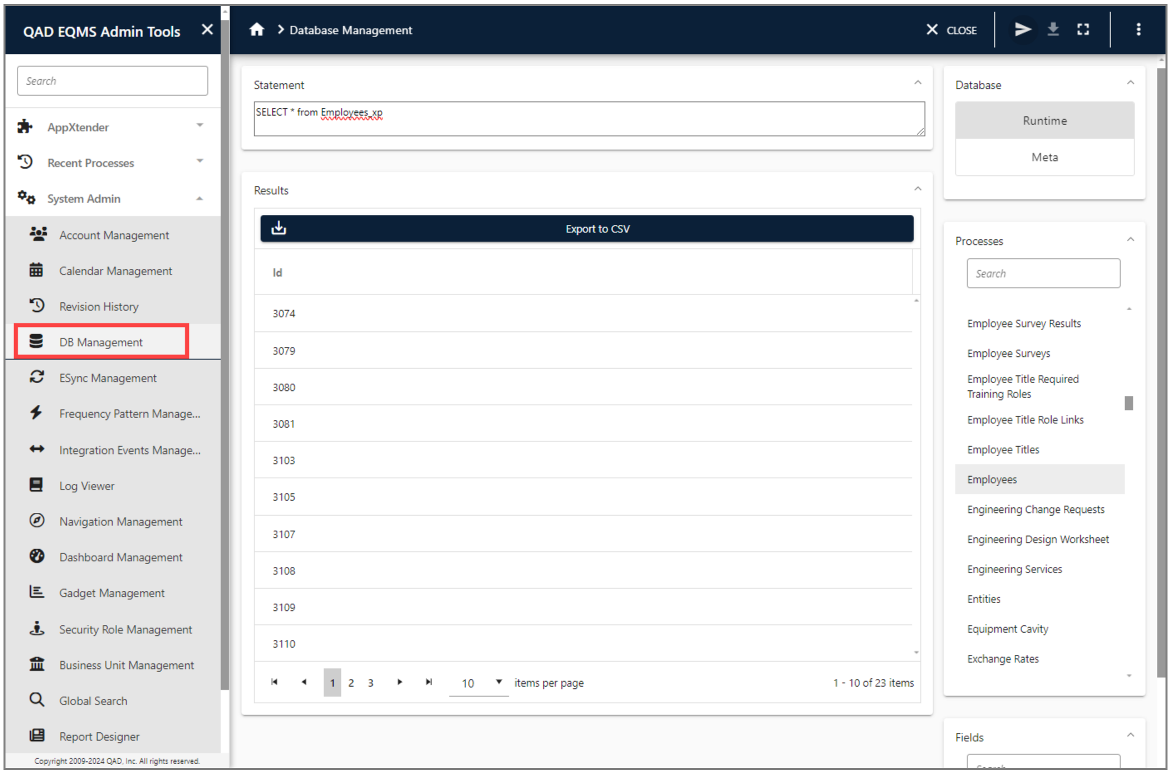
Fig. 11: Revision History Details screen, managing tags



DB Management

Database (DB) Management is used for running SQL statements to query – or retrieve data from – the database. For example, you may want to see a list of employees in the system. In this case, you would type the SQL statement "*select * from employees_p*". This returns a table containing the relevant data. You can interact with this data by organizing the table by column, showing a specific amount of items per page, and more.

Fig. 12: DB Management screen



Retrieving Data from the Database

1. Navigate to the DB Management process screen.
2. Enter a SQL statement in the Statement field. Note that as you type, suggested keywords, procedures, and functions appear to supplement your statement.

   Note: You can click the Load Runtime DB Info button to show a list of processes or Load Meta DB Info to show a list of meta names. Items can be pulled from these lists directly into the Statement field.

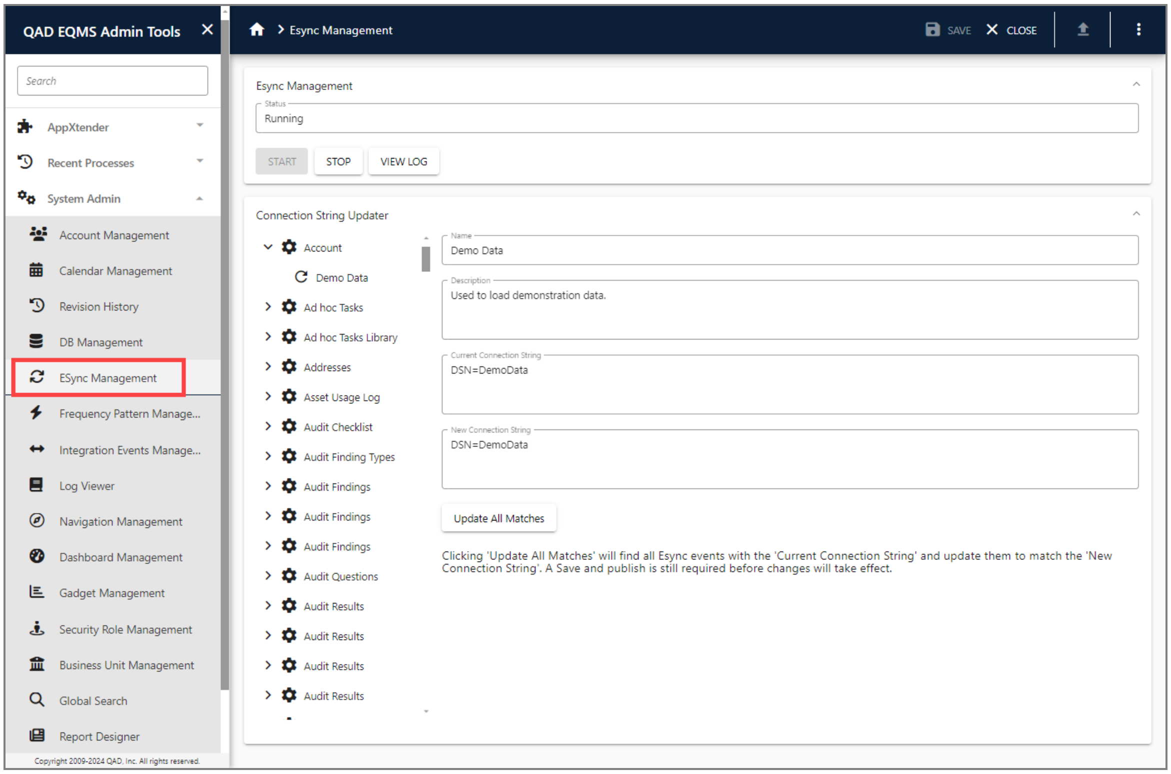
3. Click the Execute button in the toolbar. The screen loads before displaying the results in a table below the statement.
4. At the bottom of the screen, navigate through the pages and specify the number of items to show per page.

Esync Management

Esync is a one-way data transformation tool that can connect to external systems and files in order to pull data into the EQMS on a scheduled, periodic basis. Esync Management is a way to manage connection strings for each of the processes, start and stop the service, and view the log file.

The Connection String Updater section is a list of the connections between system processes and a third party source. Multiple connection strings can be assigned to a single process.

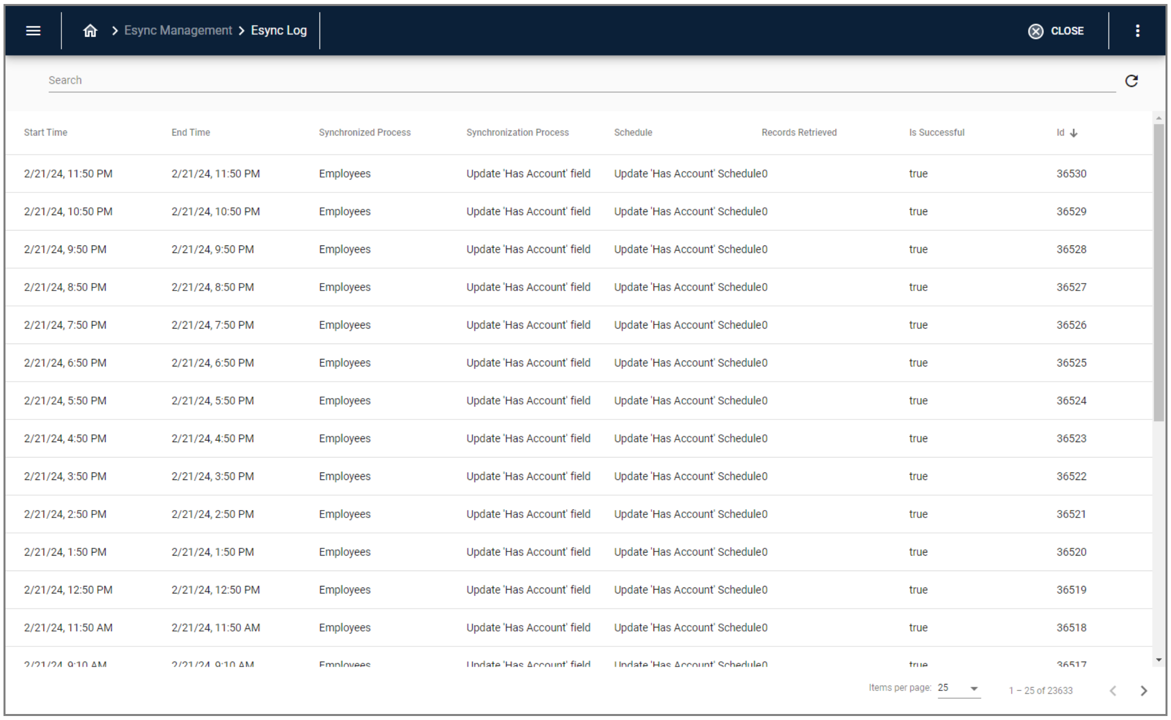
Fig. 13: Esync Management screen



View the Esync Log

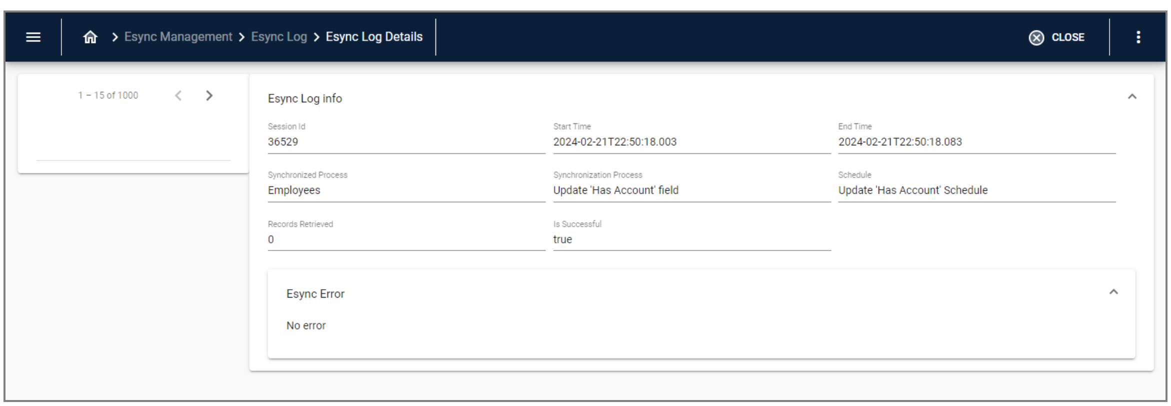
Navigate to the Esync Management process screen. In the top Esync Management section, click the View Log button. A new tab appears, displaying the start and end time for each log, the process being synchronized, how many records were retrieved, whether the sync was successful, and more.

Fig. 14: Esync Session Log screen



You can double-click a log to view its details individually. If the sync was not successful, then the error is shown on the details screen.

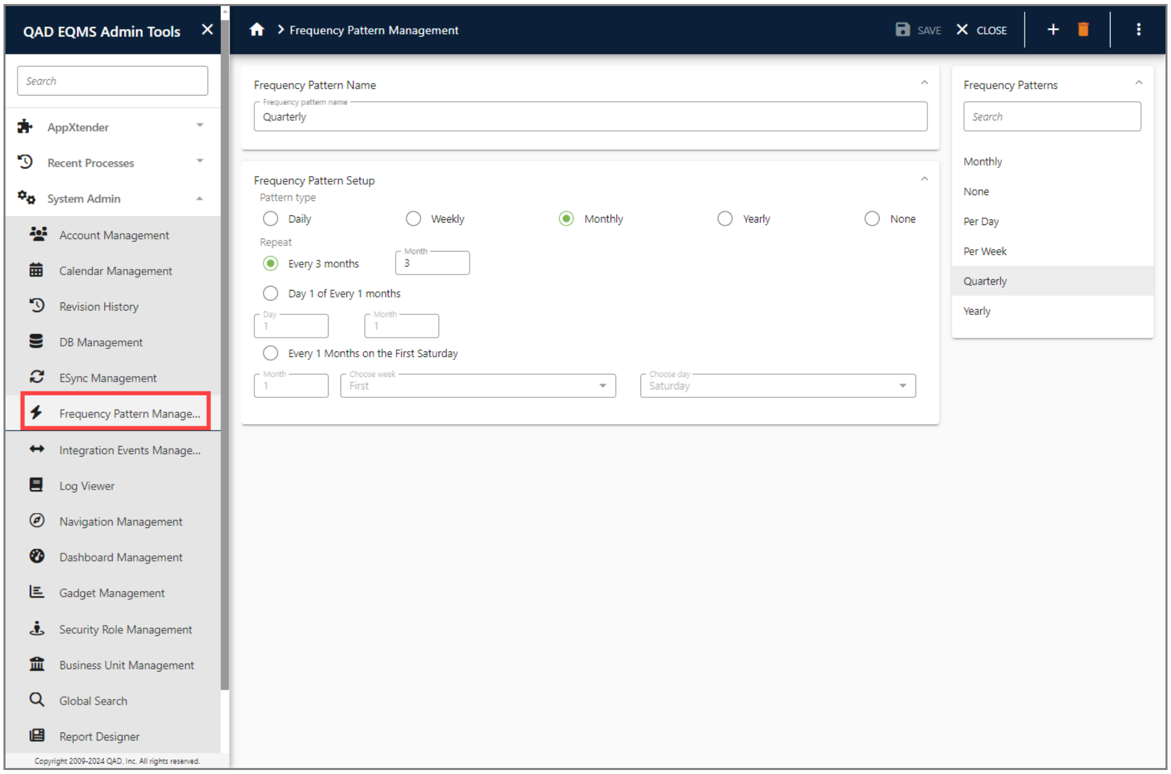
Fig. 15: Esync Log Details screen



Frequency Pattern Management

Frequency Pattern Management is used to define patterns for scheduling within EQMS processes such as Gauge Calibration or Audits. Typically, frequency patterns reflect standard units of time such as daily, monthly, quarterly, and so on.

Fig. 16: Frequency Pattern Management screen



Adding a New Frequency Pattern Management

1. Navigate to the Frequency Pattern Management process screen and click the Add New Pattern button in the contextual toolbar. A new calendar fills the display window.
2. Enter a name for the pattern.
3. Select a pattern type: daily, weekly, monthly, yearly, or none.
4. Specify how often this pattern repeats. Your options vary depending on which pattern type was selected.
    - Daily
        - Every _ days (select an amount)
        - Every working day (Monday - Friday)
    - Weekly
        - Every _ weeks (select an amount)
        - Select which days of the week the pattern repeats (at least one)
    - Monthly
        - Every _ months (select an amount)
        - Day 1 of every 1 months (select each amount, e.g. "Day 5 of every 2 months")
        - Every 1 months on the first Sunday (select each parameter: how many months, which week of the month, and which day of the week, e.g. "Every 2 months on the last Friday")

- Yearly
  - Every _ years (select an amount)
  - If Complex is selected:
    - Choose an exact date (e.g. On October 17)
    - Choose a more general date (e.g. On the second Monday of April)

5. Save the process.

Integration Event Management

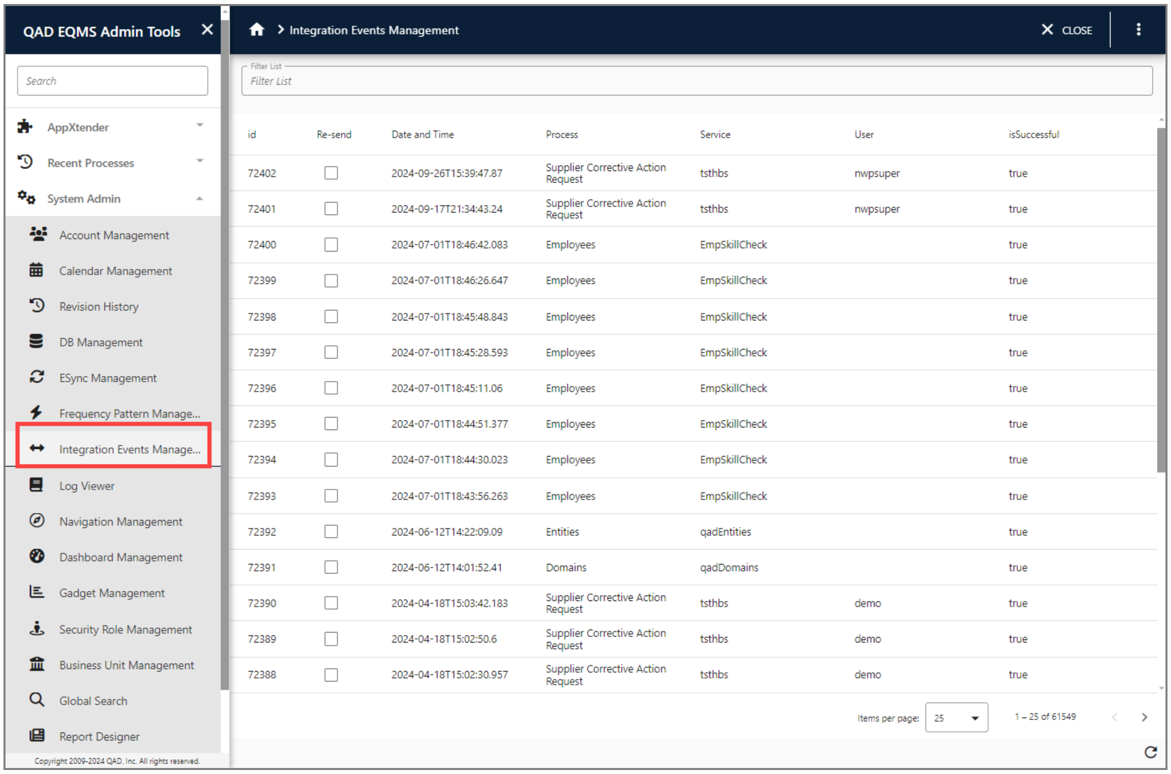
Integration events are real-time integrations that are set up to other systems. Integration Event Management shows the history of all integration events, as well as their details and status. This is especially useful when troubleshooting.

Upon opening the process, you will see a list of events that includes:

- **ID.** The event ID number.
- **Re-send.** Click this check box and click the Re-Send Selected button at the bottom of the screen to run the event again.
- **Date and Time.** The exact moment that the event occurred.
- **Process.** The process in which the event occurred.
- **Service.** A description of the event.
- **User.** The user who initiated the event.
- **isSuccessful.** An indication of whether the event was successful. If this column shows "false", you can use the Re-send check box beside that event to run another attempt.

The list of events can be filtered. When you enter a search term in the Filter List field, the system searches for that term within each event item's process, service, username, request, response, and details.

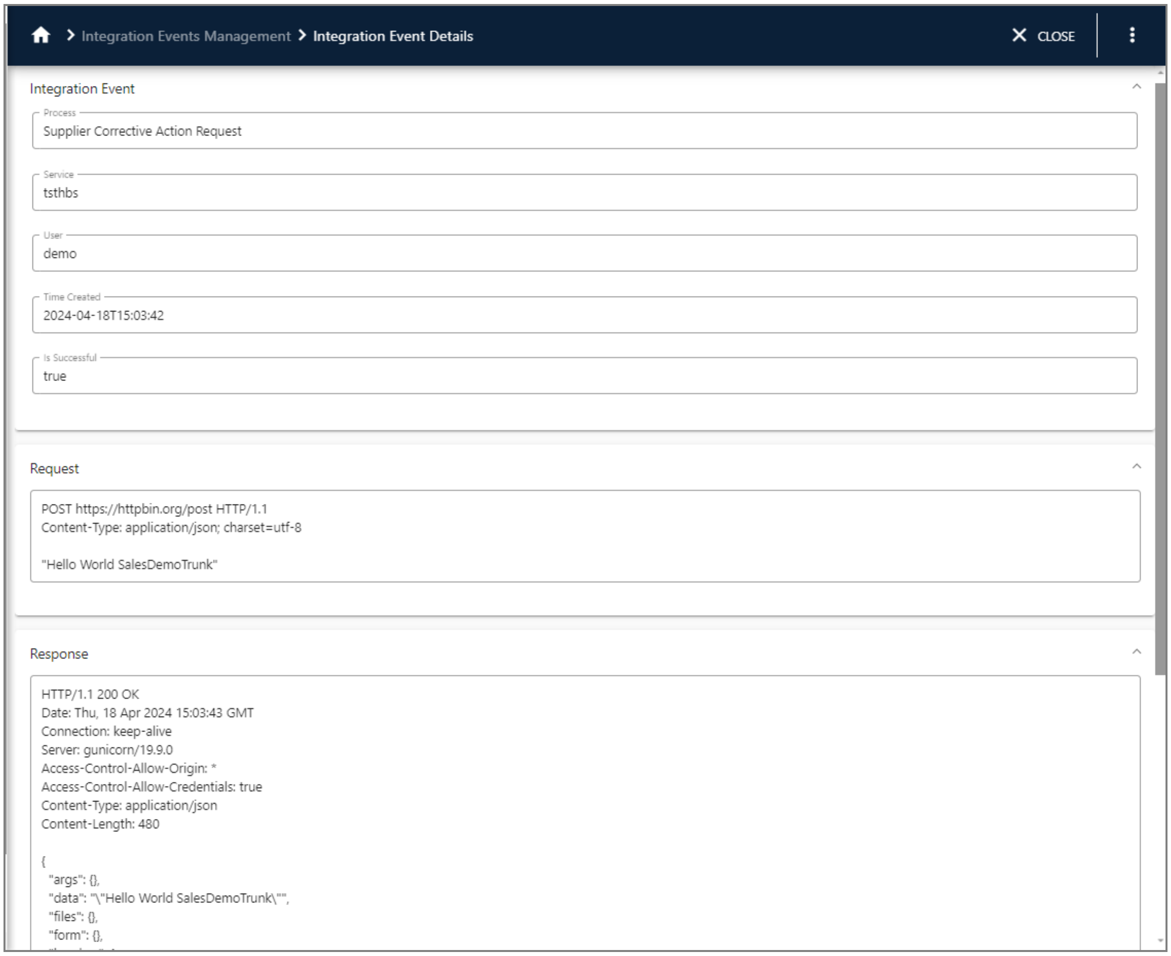
Fig. 17: Integration Event Management screen



Observing the Details of an Integration Event

In the Integration Event process screen, double-click an event to open the details in a new screen.

Fig. 18: Integration Event Info screen



In addition to the information from the main screen, the Integration Event Info screen shows the specific coding that makes up the user request and system response.

Log Viewer

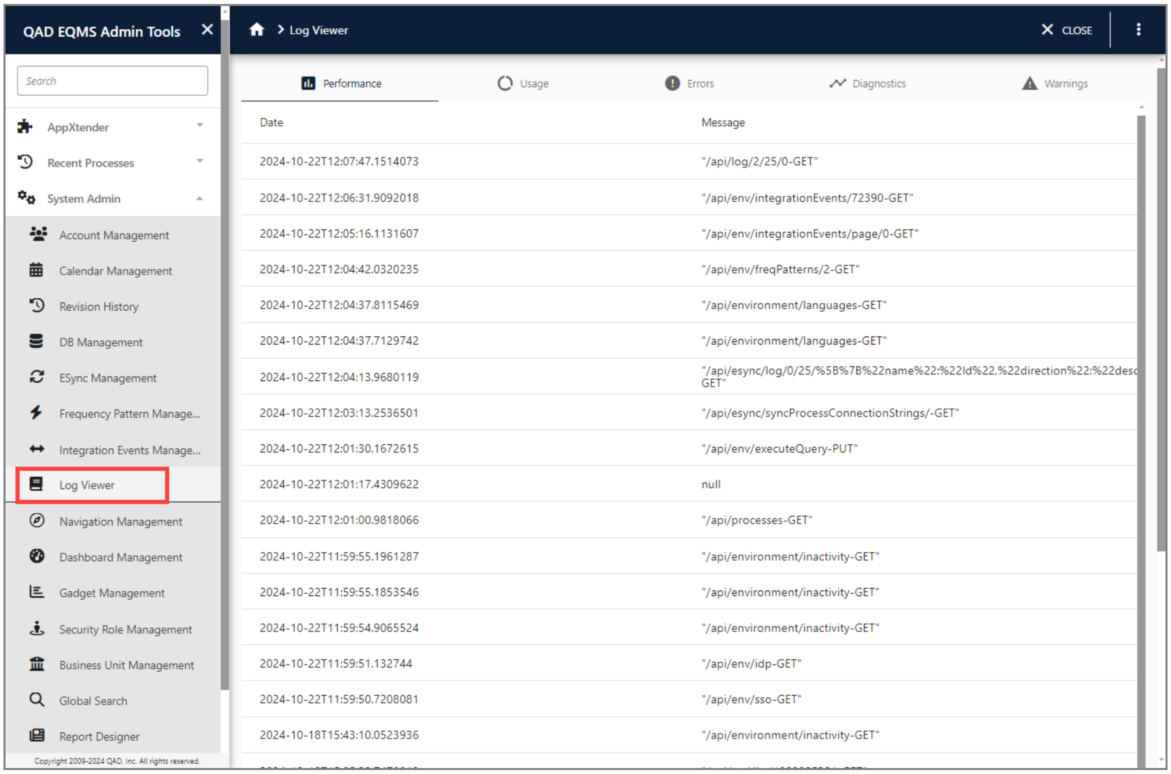
The Log Viewer allows visibility into noteworthy events that may have happened to provide input when analyzing or troubleshooting the system.

There are five different types of logs:

- **Performance.** Any time a page is accessed in the system, a log is created that describes the system's performance (e.g. how long it took to load).
- **Usage.** Usage logs track business functions so the data can later be analyzed and used to improve the system.
- **Errors.** Error logs are created when the user encounters a procedure that the system fails to perform (e.g. unable to save a record, failure to run a stored procedure, etc.).
- **Diagnostics.** Diagnostics logs are utilized by the QAD team for debugging and ad-hoc troubleshooting.

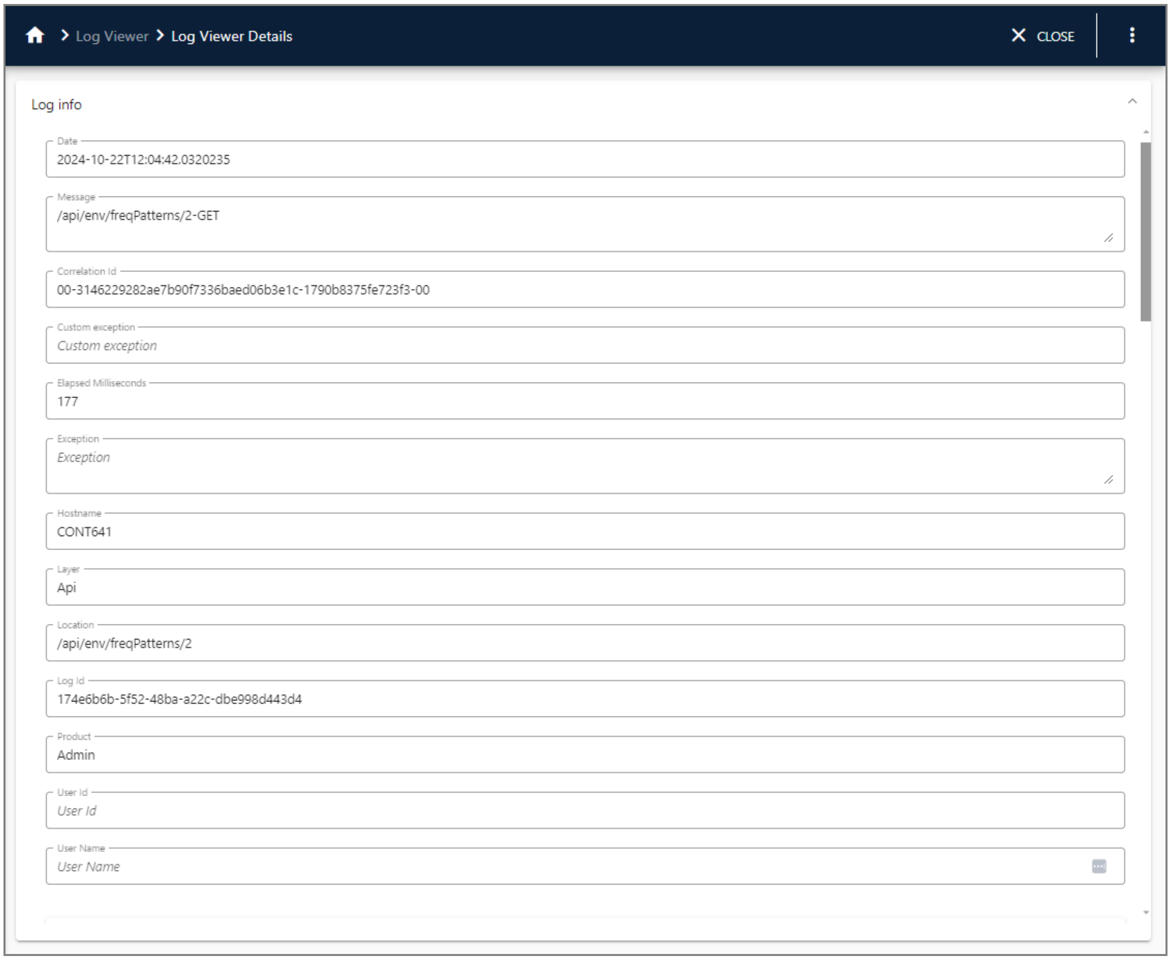
- **Warnings.** Warnings issued by the system to inform the user that a task could not be performed due to a failure to meet requirements.

Fig. 19: Log Viewer screen



Double-click a record to view the Log Details screen. In addition to the date and message, the Log Details screen contains the correlation ID, elapsed milliseconds, host name, and other technical details.

Fig. 20: Log Details screen

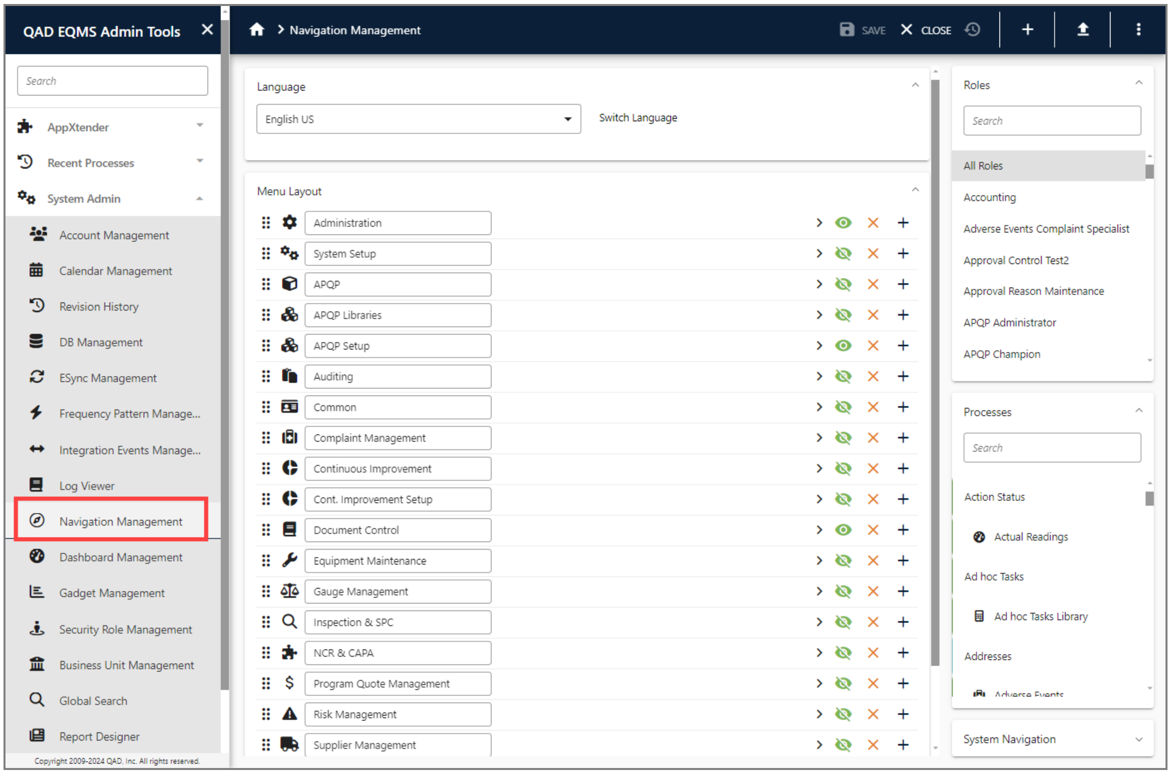


Navigation Management

Navigation Management allows you to set up the navigation menu layout and specify which processes and applications each role can see. You can also set the default language.

The menu layout order remains the same for all roles; however, you can hide specific applications and processes from view by toggling the visibility icon to the hidden position. Processes can be drag-and-dropped from the Processes item menu or removed from the menu layout entirely.

Fig. 21: Navigation Management screen



Organizing the Menu Layout

Moving Processes

1. Navigate to the Navigation Management process screen.
2. In the Menu Layout section, click the grab icon beside an application.
3. Hold and drag the application to a different location on the menu to reorder it.
4. Save the record when finished.

Adding Processes

1. Navigate to the Navigation Management process screen.
2. In the Menu Layout section, click the arrow beside an application. The application expands to show the processes within.
3. Grab a process in the Processes item menu on the right. Drag the process to the application list and drop it; the process is now part of that application.
4. Save the record when finished.

Removing Processes

1. Navigate to the Navigation Management process screen.
2. In the Menu Layout section, click the orange icon beside the process. The process is removed from the menu.
3. Save the record when finished.

Setting View Permissions for a Role

1. Find a role in the Roles item menu on the right. Click the role.
2. Click the green "hidden" icon beside an application. The slash disappears, indicating that the application is now visible to the selected role.
3. Click the arrow beside an application. The application expands to show the processes within.
4. Note that all green icons are toggled to the "visible" setting. For each process that should **not** be visible, click the icon to hide that process from the role.
5. Save the record when finished.

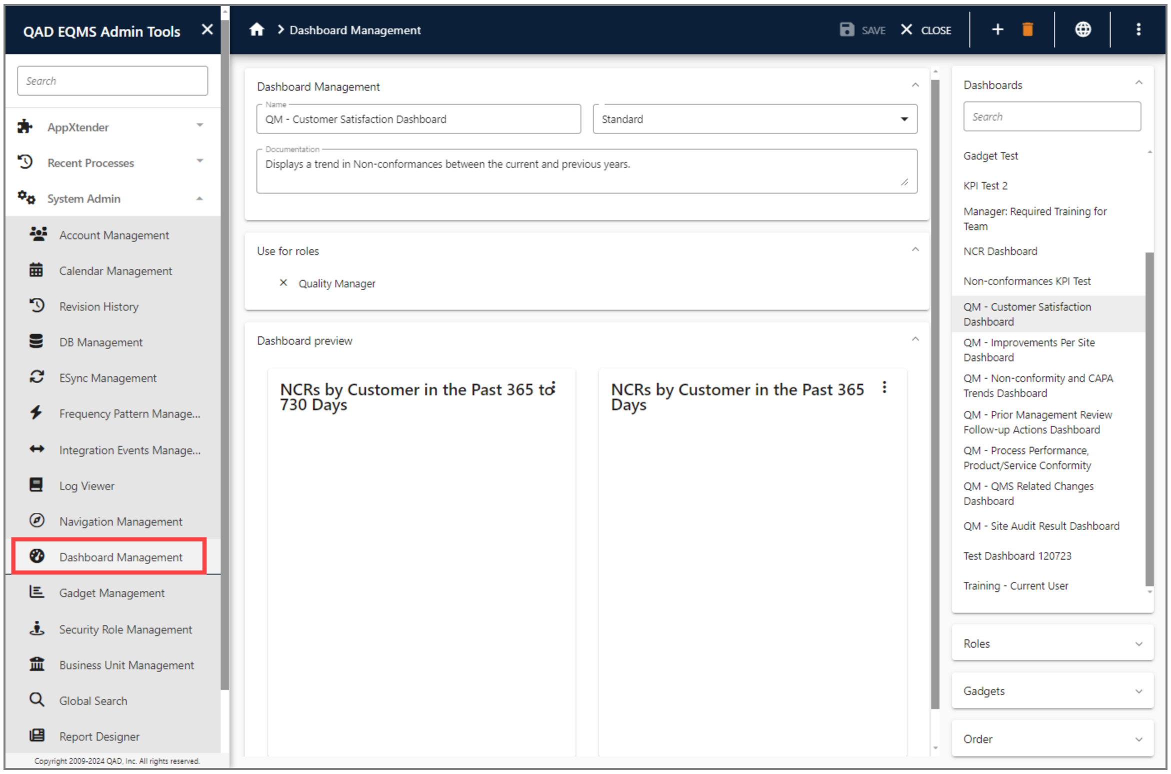
Dashboard Management

Dashboards are configurable visual displays of information that you can use as a quick look into specific process details. These are definable for individual users within the EQMS, as you can create a new dashboard page, name it, and add gadgets. In the Dashboard Management process, admins can define dashboards with a specific layout and associated with one or more roles. These roles are used to filter down (at the end user level) what defined dashboards the user can add.

Dashboards are available in two forms: standard and URI. Standard dashboards utilize gadgets, such as metrics and approvals, while URI dashboards contain an external web object, such as a Twitter feed or QAD Web Service content. Note that gadgets must already exist in order to be added to a dashboard; see "Gadget Management" on the facing page for more information.

Once a dashboard type is set and the gadgets or URL have been added, select the roles to which this dashboard is assigned, then save the record. If you selected the URI type, a preview of the dashboard will populate after the save.

Fig. 22: Dashboard Management process screen



Adding a Standard Dashboard

1. Navigate to the Dashboard Management process and click the Add New Item button in the contextual toolbar. A new dashboard fills the display window.
2. Give the dashboard a name and document its intended purpose. Ensure that Standard is selected.
3. Expand the Roles item menu and select one or more roles who can access this dashboard.
4. Expand the Gadgets item menu and select one or more gadgets to display in this dashboard.
5. Expand the Order item menu. You can drag and drop the gadgets to appear in the order that you choose.
6. Save the process.

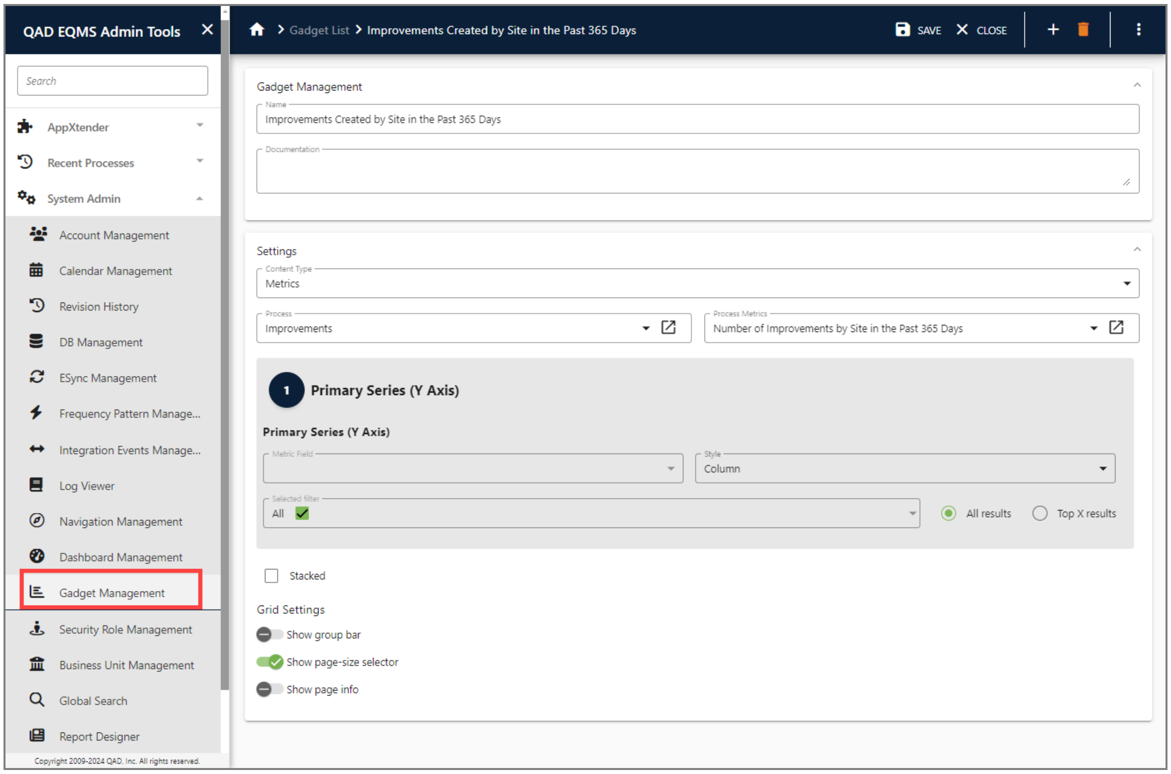
Gadget Management

The Gadget Management process provides the ability to create custom and predefined gadgets, which can then be added to role-based dashboards. See "Dashboard Management" on the previous page.

Gadgets are available in two forms: standard and external. Standard gadgets have the functionality currently available in the EQMS, such as metrics, KPIs, assignments, Pareto series, and more. External gadgets act as a simple container that could be pointed to a URL, such as a Twitter feed or QAD Web Service content.

Settings for the standard gadgets reflect the settings within the EQMS. This means that some gadgets, such as Metrics and Search Grids, utilize parameters and process selections. External gadgets, however, only require a content URL.

Fig. 23: Gadget Management process screen



Adding a New Metric Gadget

Note: Metrics and filters are created within AppXtender. See the [AppXtender user guide] for more information.

1. Navigate to the Gadget Management process and click the Add New Item button in the contextual toolbar. A new gadget fills the display window.
2. Give the gadget a name and document its intended purpose.
3. In the Content Type field, select Metrics.
4. Select the process to which this gadget applies. Then select a process metric. The selected metric appears.
5. Select the metric field and the style in which you want the data to appear: Column, Line, or Pie.
6. You may select a filter by which to sort the data, or click the All check box to show all records.
7. You may choose to view all results, or only the top X amount of results.
8. If the metric has a secondary Y axis, you may choose to have separate Y axes.
9. If the metric style is Column, you may choose to see a stacked version of the data.
10. Save the process.

Adding a New Search Grid Metric

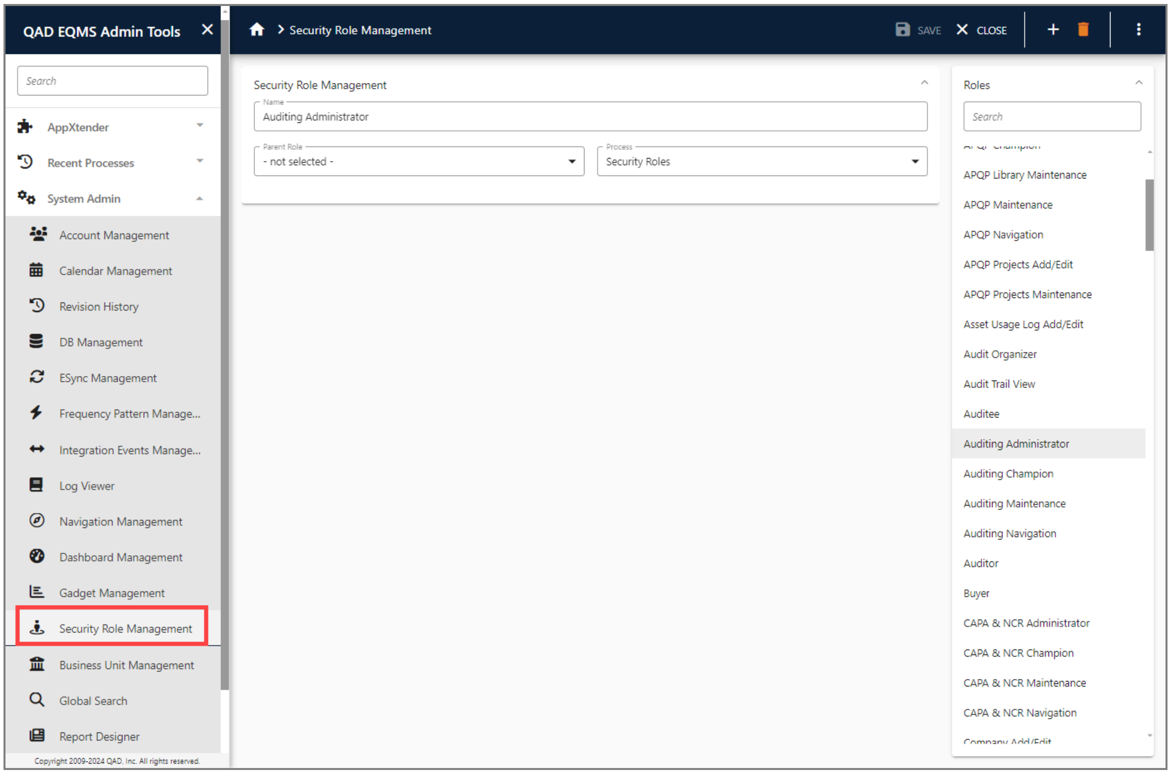
1. Navigate to the Gadget Management process and click the Add New Item button in the contextual toolbar. A new gadget fills the display window.
2. Give the gadget a name and document its intended purpose.
3. In the Content Type field, select SearchGrid.
4. Select the process to which this gadget applies.
5. You can select a filter and a layout for the gadget.
6. Select the grid settings.
    1. **Show group bar.** Provides a gray bar where you can drag and drop column headers to sort data.
    2. **Show page-size selector.** Provides a selector to determine the number of items shown per page.
    3. **Show page info.** Shows the number of items per page, and the number of results in total.
7. Save the process.

Security Role Management

Security Role Management is a process where you can see existing security roles and add new roles, if desired. The roles in this process are the same roles used to set up security throughout AppXtender.

You may choose to associate a security role with a parent role, which would allow you to apply the parent role's security to the child roles.

Fig. 24: Security Role Management screen



Business Unit Management

Please consult QAD services if you are considering the use of the Business Unit Management feature.

Report Designer

Report Designer allows you to create a new process report or edit a currently existing report file.

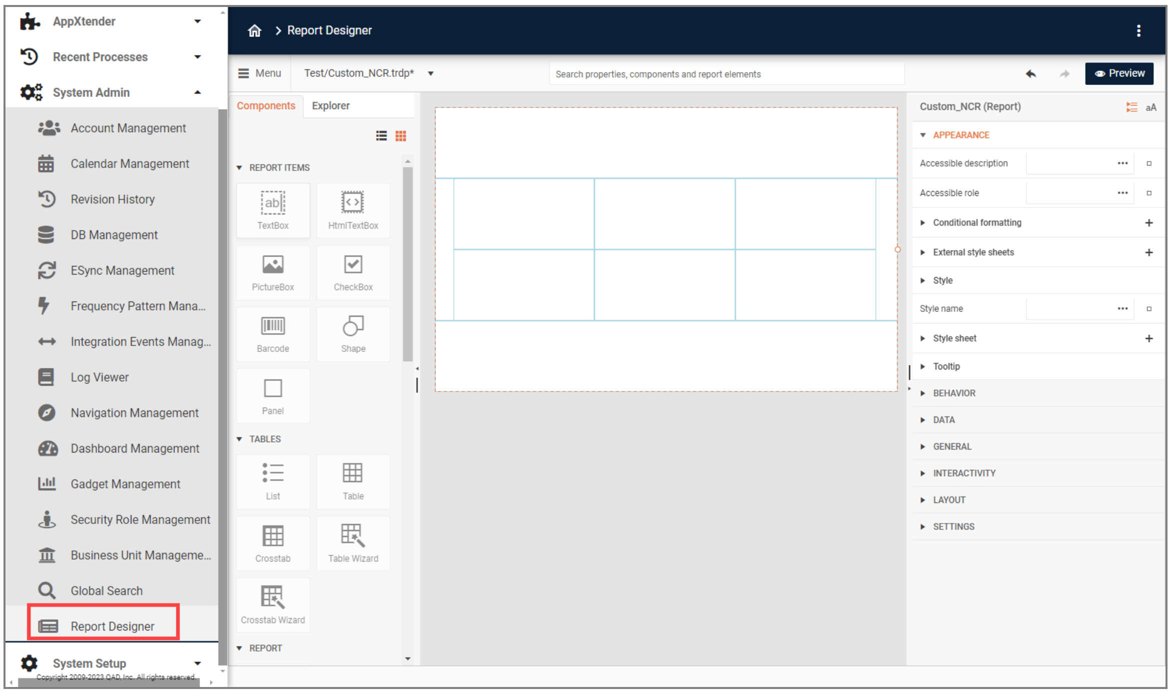
Once you are finished designing and saving a report, you can add it to a process in AppXtender. See the Outputs>Reports section in the Admin Tools: AppXtender user guide to learn how to perform this task.

The report designer contains an Onboarding Guide, which walks you through the main tools used in the Web Report Designer. These tools include:

- **Design Surface.** A visual representation of the report layout. This section provides tools for selecting, moving, resizing, and editing the report items.
- **Components.** A panel that contains the report items you can add to the report. These items are organized into groups based on their purpose, such as TextBox, Barcode, PictureBox, and more.
- **Explorer.** A tree representation of the report structure, which allows you to select and configure all the report items, both visual and non-visual.

- **Properties Area.** A panel that displays the properties of the currently selected report item with their current values. You can change and reset these values.
- **Main Menu.** A selection of actions that allows you to create, open, and save reports.
- **Assets Manager.** A tool, located in the Main Menu, which allows you to upload and organize various resources on the server that can be reused in different reports.
- **Report Preview.** A preview button, which generates a report document to show the result of the designed report.
- **Search box.** A box in which you can search for any report item, property, or tool.

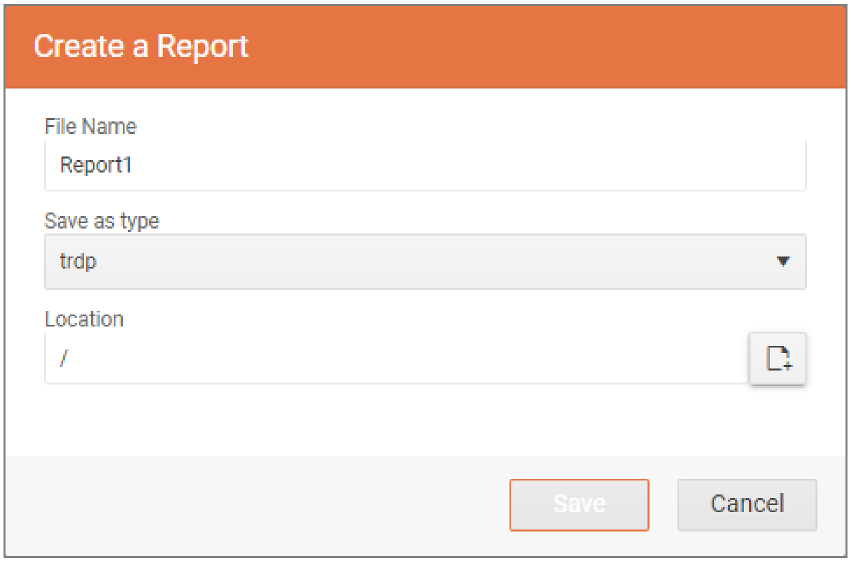
Fig. 25: Report Designer screen



Add a New Report

Navigate to the Report Designer process screen. Click the Menu button in the top-left corner and choose New Report. A new window appears.

Fig. 26: Create a Report window



Name the report, then click the Location button to choose where to store the new report file. Once the location is set, click Save, then Save again.

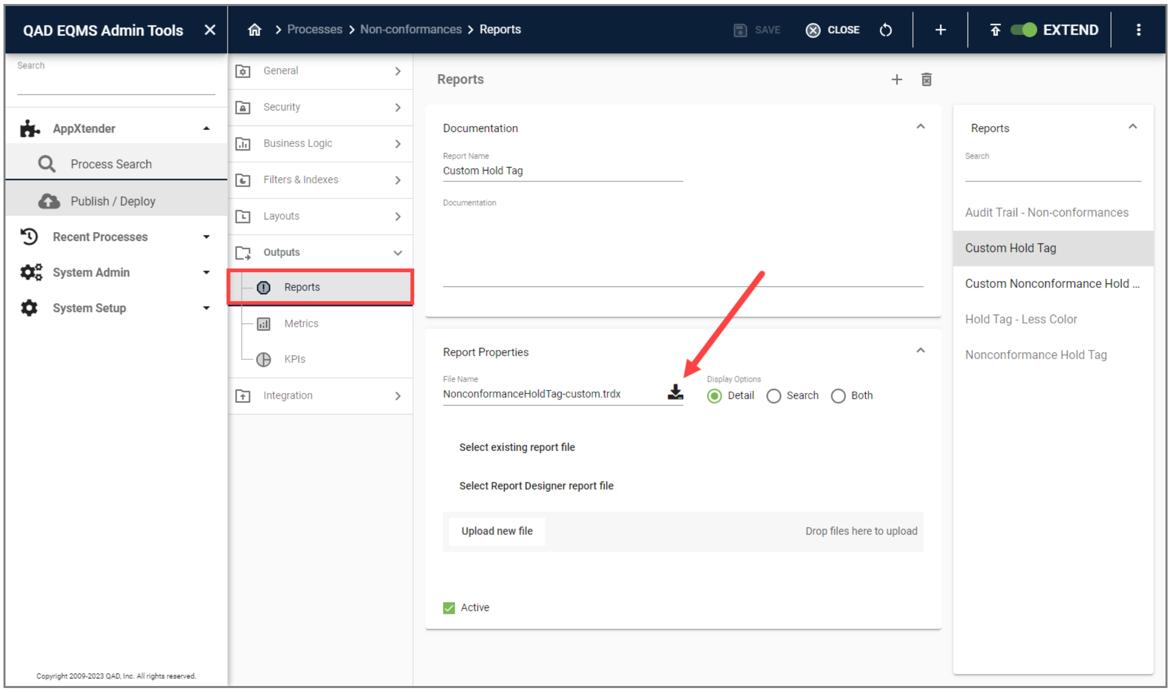
Add an Existing Report for Editing

In AppXtender, open the process whose report you want to download. Navigate to the Outputs section and select Reports. Using the left-side panel, choose the report you want to download.

Under the Report Properties section, you can see the report file's name and the download button beside it. Click this button to download the report file.

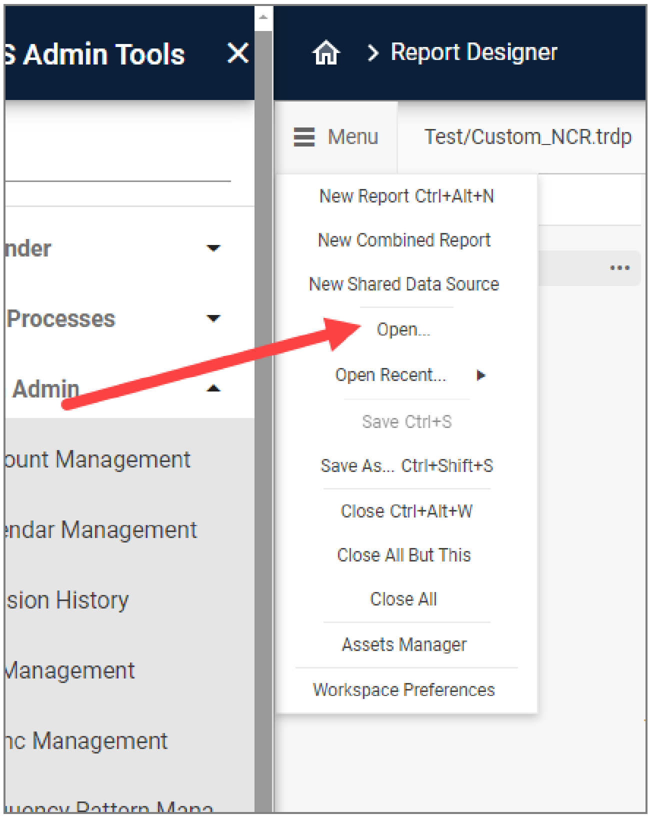
It is best practice to rename the downloaded report file to avoid adding a duplicate file.

Fig. 27: AppXtender process, Reports screen



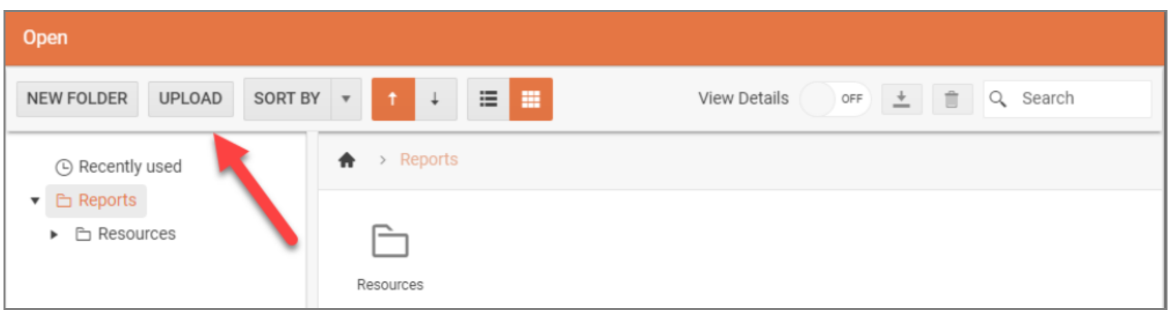
Open the Report Designer in System Admin. Upload the report file to the editor by clicking Menu>Open.

Fig. 28: Report Designer Menu



Select Upload and upload the report to the designer.

Fig. 29: Upload File screen



After the report file is uploaded, open the report by either double-clicking the file or clicking Open.

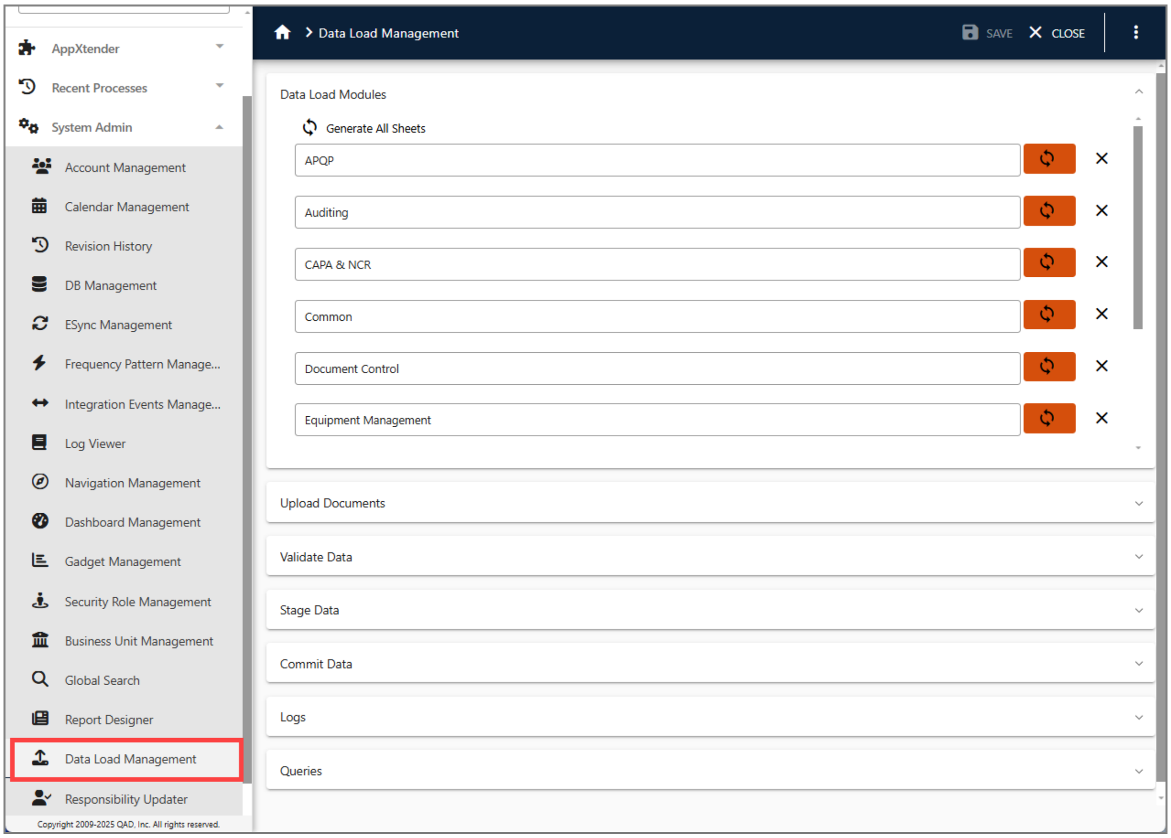
Data Load Management

The Data Load Management process allows users to organize, validate, and load data into EQMS applications. In the Data Load Modules section, you can generate load sheets and download them by module so they can be populated with the data to be loaded. Once the sheets are loaded, they can be uploaded and validated. After the data has passed validation, it can be uploaded.

If documents are being migrated, they can be loaded before validation, which puts the files on the server. After the documents are properly loaded, they can be removed from the server through the utility.

Optionally, details of the changes can be viewed in the Logs section. Finally, the Queries section shows what happened in the database during the executed data load.

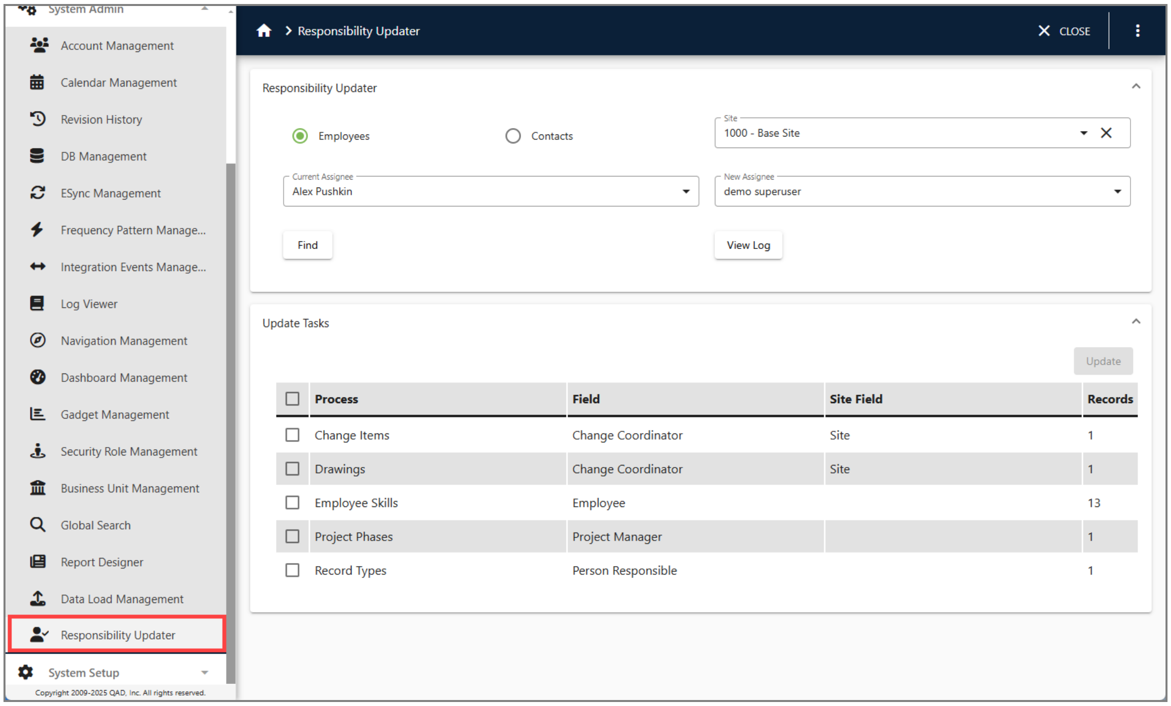
Fig. 30: Data Load Management screen



Responsibility Updater

The Responsibility Updater provides the ability to bulk replace some open assignments from one employee to another. After selecting the site and the current and new assignees, click the Find button to load the appropriate tasks. You can select the check box beside each assignment you want to replace, then click the Update button to complete the transfer.

Fig. 31: Responsibility Updater



Chapter 3

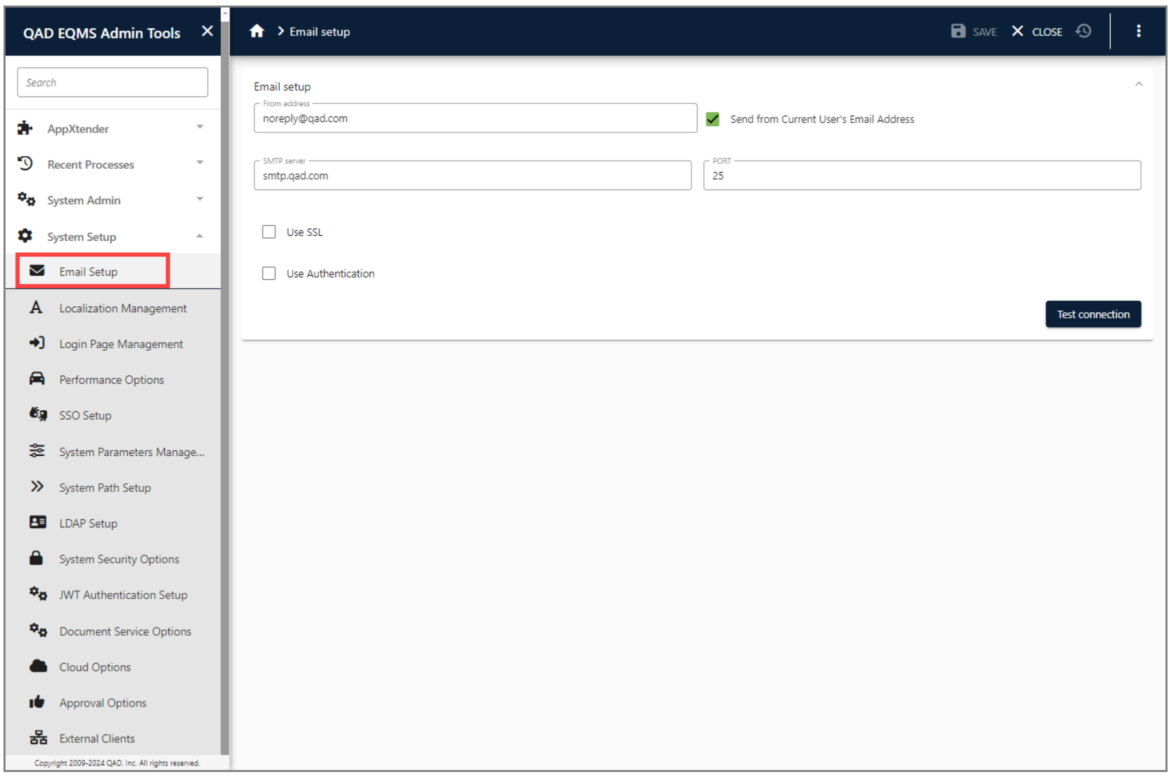
System Setup

Email Setup

The Email Setup process specifies which email server will be used to send inbox action messages and other email interactions from the EQMS. You can test the connection by clicking the Test Connection button, entering an email address to sent a test message to, then clicking Apply.

You have the option of using SSL (Secure Sockets Layer) or username and password authentication. SSL is technology that uses encryption algorithms to keep an internet connection secure and safeguard any sensitive data that is sent between two systems.

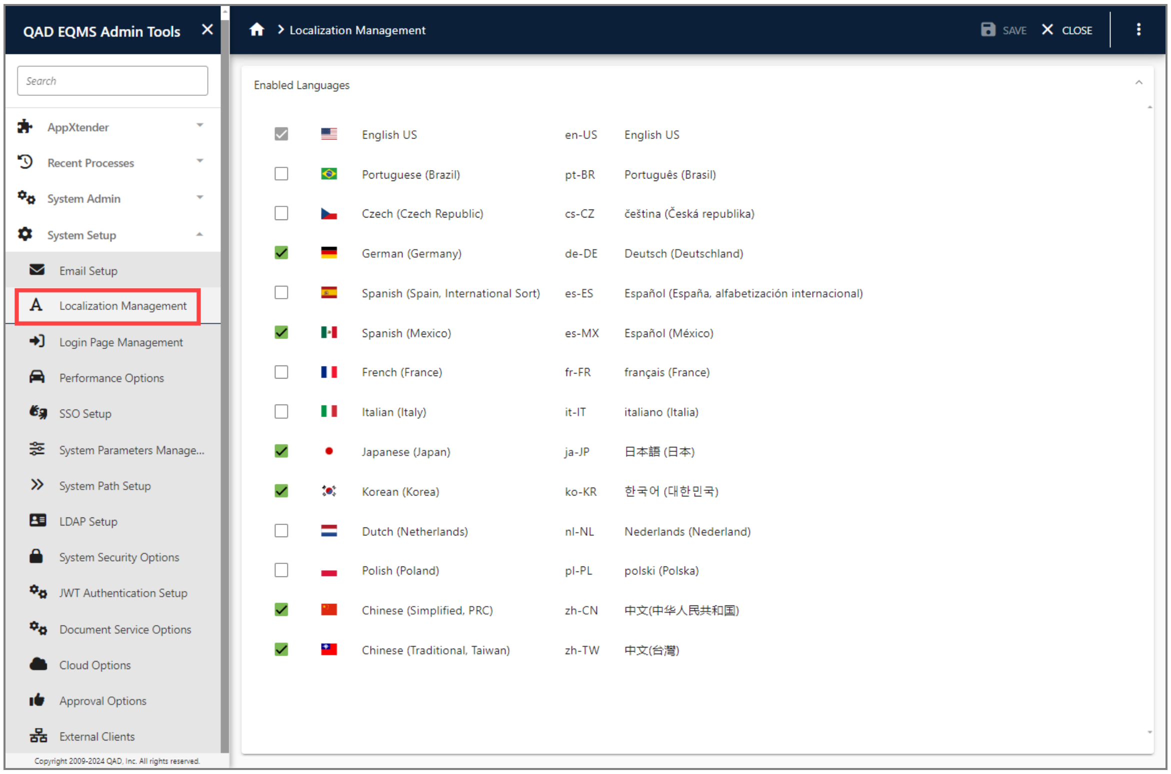
Fig. 32: Email Setup screen



Localization Management

The Localization Management process sets the languages for the EQMS. Each language whose check box is selected will be available within the system for users to choose from in their account settings. This way, users can select their own language.

Fig. 33: Localization Management screen



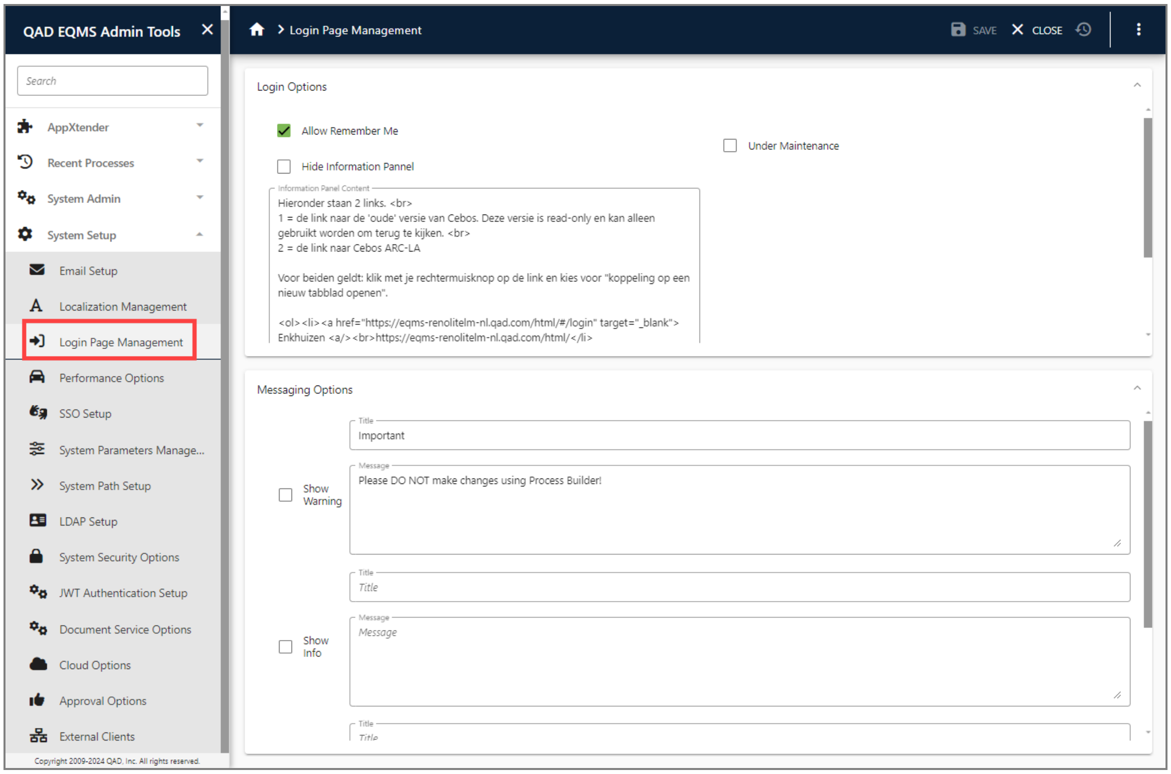
Login Page Management

The Login Page Management process sets up the layout for the EQMS login page. In the Login Options section, you can set the following options:

- **Allow Remember Me.** Select this check box to give users the option to have the system memorize their login credentials.
- **Under Maintenance.** Select this check box to signify the system is under maintenance and, therefore, users cannot log in.
- **Hide Information Panel.** Select this check box to hide the information panel beside the login panel.
- **Information Panel Content.** If the information panel is visible, then use markup language in this field to set the panel's visuals and content. Check the Preview field to see how this content will appear.

In the Messaging Options section, you can choose to show a message that indicates a warning, information, or a successful login. These messages will not show unless the appropriate check box is selected.

Fig. 34: Login Page Management screen

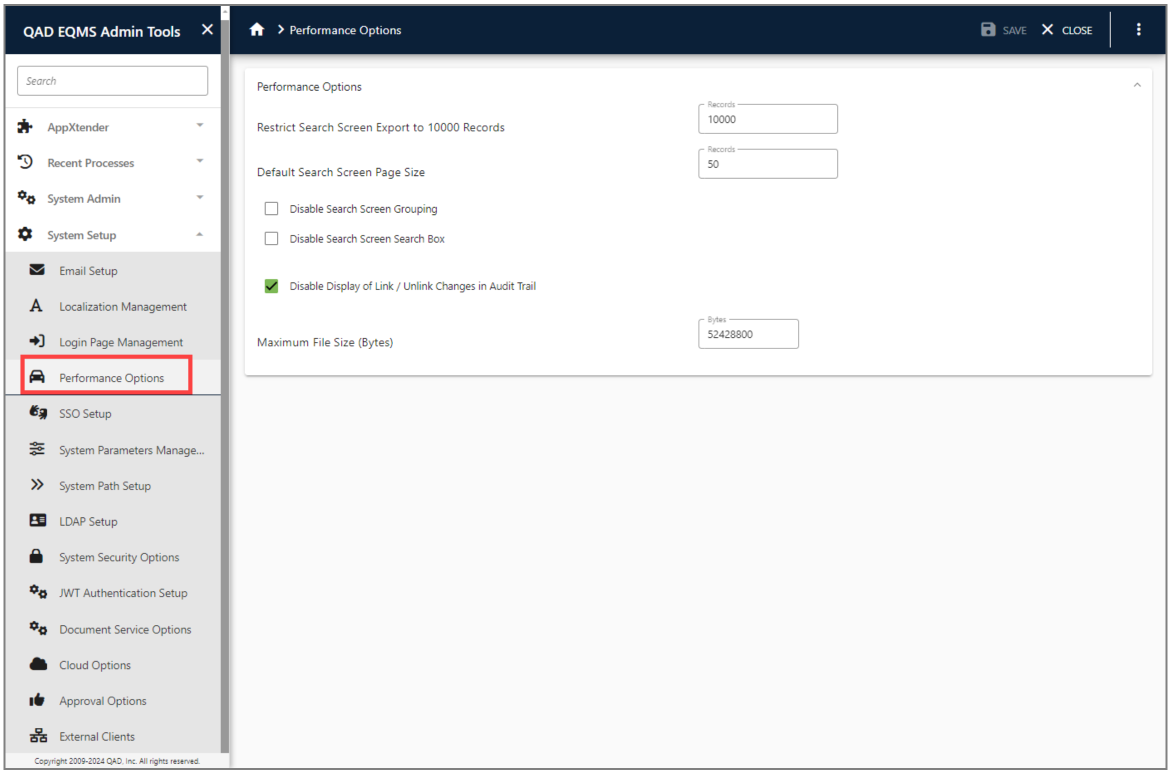


Performance Options

The Performance Options process sets specifications for the EQMS search screen. These specifications are as follows:

- **Restrict Search Screen Export to -- Records.** Set the maximum number of records that can be exported from a search screen at one time. The default number is 50,000.
- **Default Search Screen Page Size.** Set the default number of records that display in a search screen. The default number is 10.
- **Disable Search Screen Grouping.** Click this check box to disable column grouping in search screens. By default, records in a search screen can be grouped by dragging and dropping a column header in the designated area.
- **Disable Search Screen Search Box.** Click this check box to hide the search box in search screens. The search box is visible by default.
- **Disable Display of Link/Unlink Changes in Audit Trail.** In the EQMS, when the Link button is used in a cross-reference field, two or more records are linked together. This link is recorded in an audit trail report. Click this check box to hide the link/unlink changes portion of the audit trail report.
- **Maximum File Size (MB).** Set the maximum file size for attached records (measured in megabytes).

Fig. 35: Performance Options screen



Setting Up Performance Options

1. Enter the record limit for the number of records that can be exported from the search screen.
2. Enter the number of records that appear in the search screen by default.
3. Click the "Disable Search Screen Grouping" check box if you do **not** want to allow records in the search screen to be grouped by a specific field (e.g. States, Document Types, etc.).
4. Click the "Disable Search Screen Search Box" check box to hide the Search bar feature in the search screen.
5. Click the "Disable Display of Link/Unlink Changes in Audit Trail" check box to exclude record changes in the Audit Trail.
6. Save the record when finished.

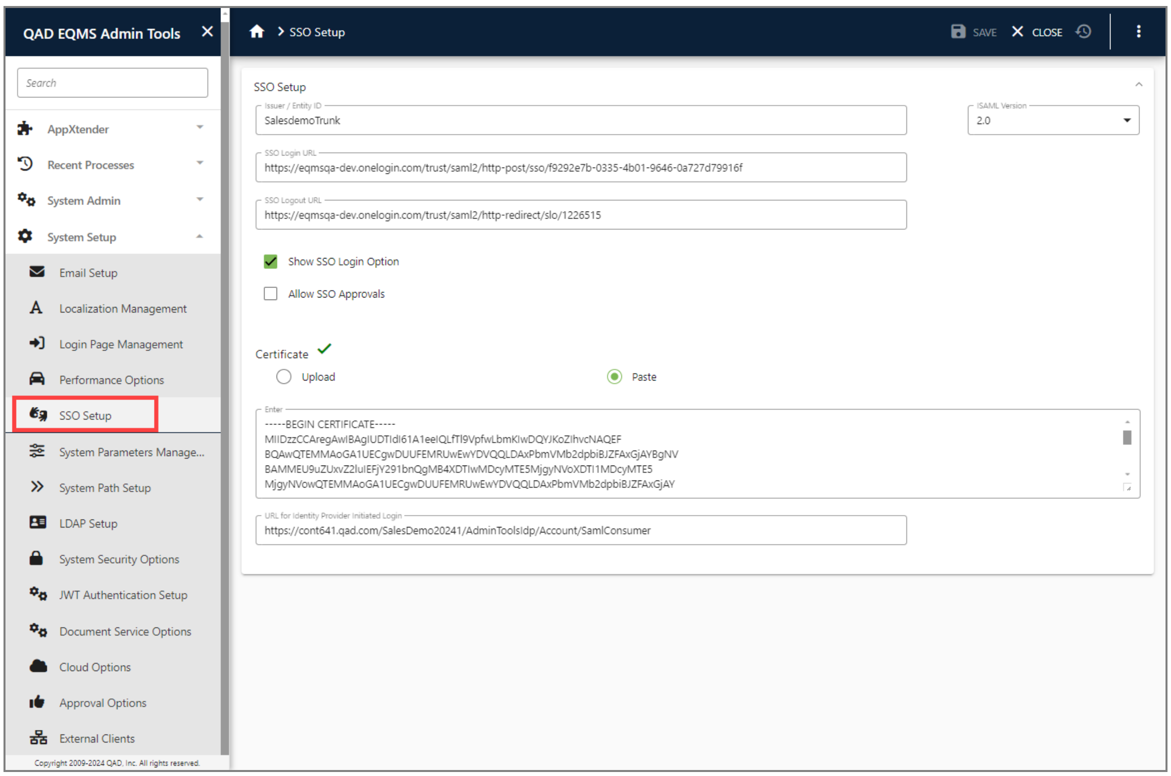
SSO Setup

The SSO Setup process allows you to organize the information necessary to set up an SSO (single sign-on). SSO is a session and user authentication service that permits a user to use one set of login credentials to access multiple applications.

There are several different ways to set up SSO authentication. The setup options are as follows:

- **Issuer/Entity ID.** The specific SSO that is being used.
- **SAML Version.** The version of SAML that is being used. SAML (security assertion markup language) is the authentication process that verifies the user's identity and credentials.
- **SSO Login URL.** The web address for logging in to the SSO.
- **SSO Logout URL.** The web address for logging out of the SSO.
- **Show SSO Login Option.** Select this check box to allow the option for users to use an SSO login.
- **Allow SSO Approvals.** Select this check box to allow the option for users to use SSO for approving records.
- **Certificate.** Users may use a digital certificate instead of a username and password authentication for SSO. This certificate can be uploaded or pasted.

Fig. 36: SSO Setup screen

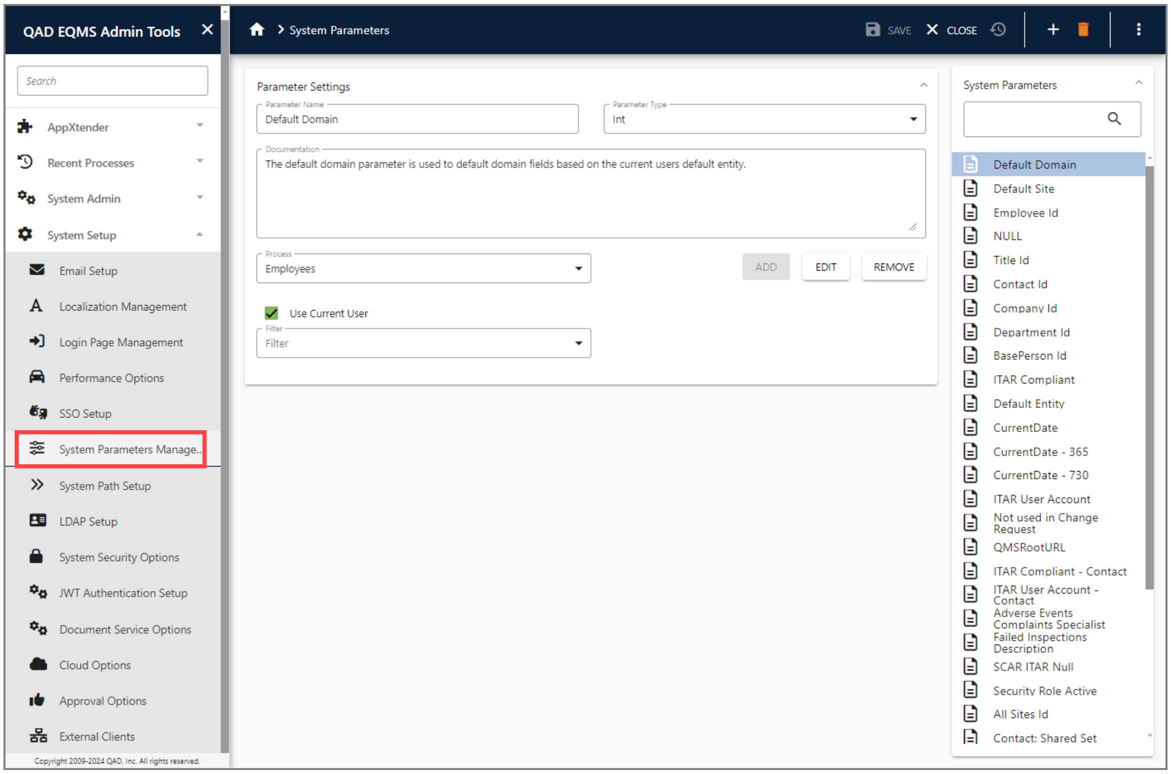


System Parameters Management

The System Parameters Management process controls the preset parameters that automatically populate specific fields based on the defaults set for the currently logged in user.

The preset system parameters should **not** be deleted or altered. New parameters may be created.

Fig. 37: System Parameters Management screen



Adding a New System Parameter

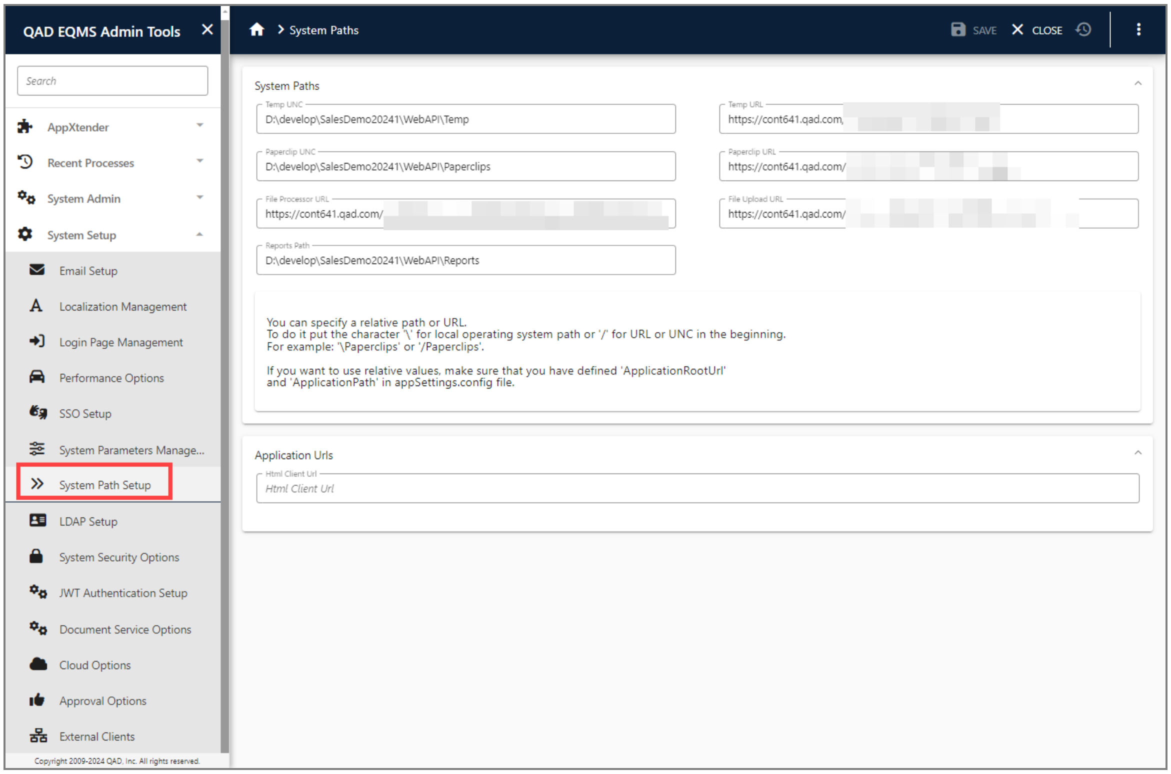
1. Navigate to the System Parameters Management process and click the Add New Item button in the contextual toolbar. A new parameter fills the display window.
2. Enter a name for the parameter.
3. Select the parameter type: Int, String, Boolean, Double, or DateTime.
4. Enter a description of the parameter.
5. Select which process the system should refer to for the user: Base Person, Employees, or Contacts.
6. Click Add. A new screen appears, in which the value expression must be built. See "Expression Builder" in the AppXtender user guide for more information on building a value expression.
7. Click the Save button when finished.

System Path Setup

The System Path Setup process contains the values for the EQMS application installation. The web server that hosts the application contains paths for report files, paperclips, and the document service. The values for these paths are defined in this process.

Note that these values should **not** be changed unless advised by QAD.

Fig. 38: System Path Setup screen

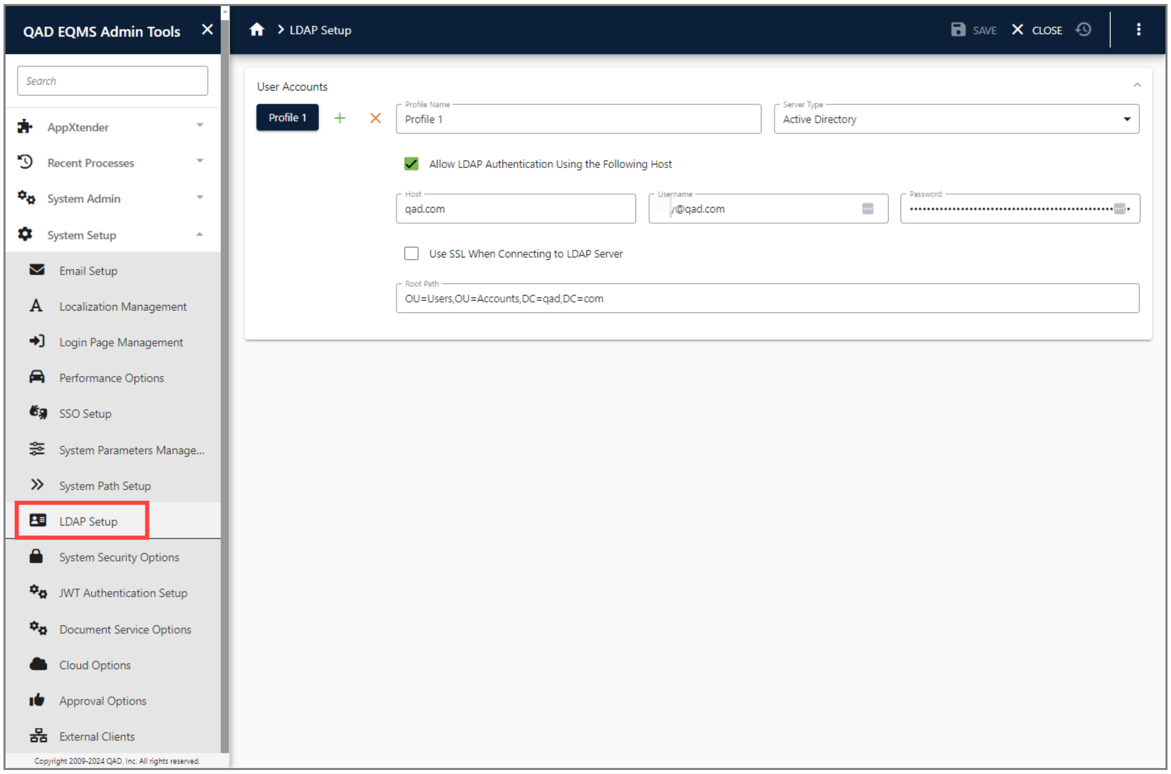


LDAP Setup

LDAP, or lightweight directory access protocol, is a client-server protocol for accessing directory services. It allows EQMS to integrate with LDAP services such as those build in Window's Active Directory. Your Windows user name and password would be synced with your QAD EQMS user name and password.

You may opt to use SSL (secure sockets layer) to establish an encrypted link for the connection between EQMS and LDAP.

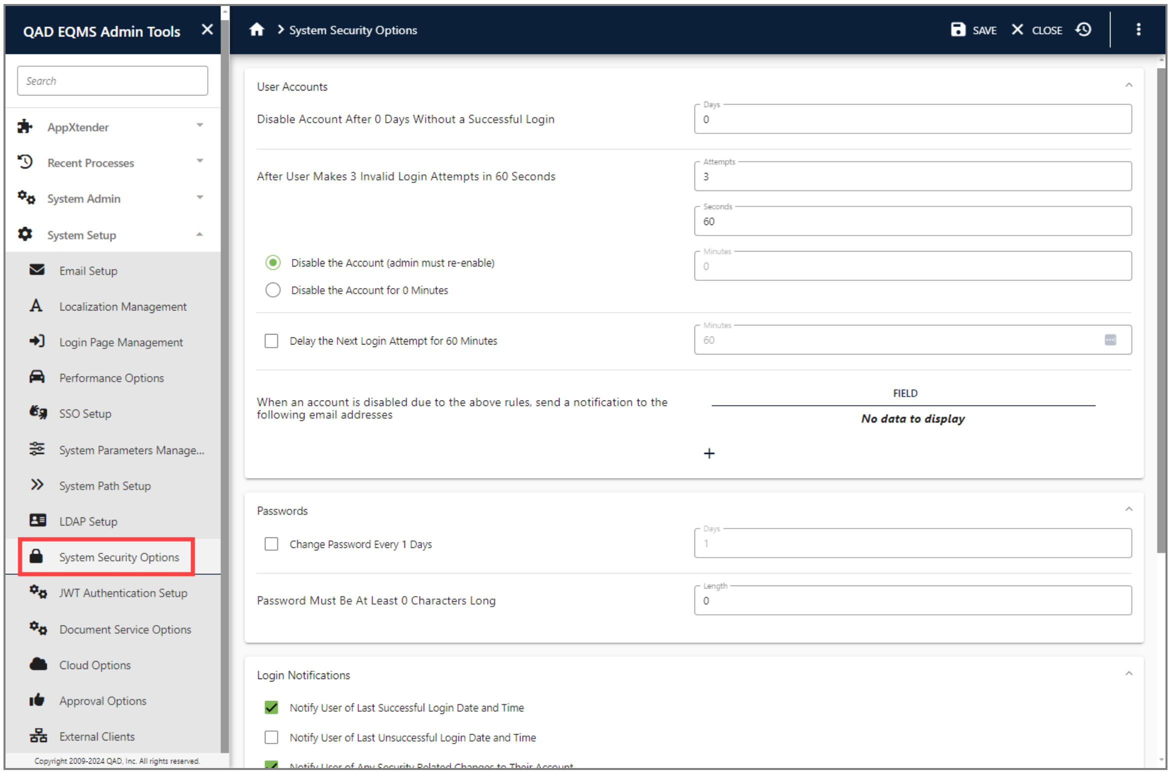
Fig. 39: LDAP Setup screen



System Security Options

You can set security options for user accounts, passwords, login notifications, and session inactivity timeout. Note that these options may be left blank if you do not want to place any restrictions on passwords or login attempts.

Fig. 40: System Security Options screen



User Accounts

- **Disable Account After __ Days Without a Successful Login.** Specify how many days should pass without a successful login before the account is disabled.
- **After User Makes __ Invalid Login Attempts in __ Seconds.** Specify the number of invalid login attempts allowed within a specified span of time before the account is disabled.
  - **Admin must re-enable.** The user account is disabled until an admin re-enables the account.
  - **Disable the Account for __ minutes.** The user account is disabled for a specified amount of time before automatically becoming re-enabled.
- **Delay the Next Login Attempt for __ Minutes.** Select this check box if you want to set a time limit between login attempts.

You can add one or more email addresses to receive a notification when an account is disabled.

1. Click the Add + button at the bottom of the User Accounts section. A new line item appears.
2. Enter an email address in the line.
3. Click the Grab icon and drag/drop the line item to reorder emails.
4. Click the orange button to remove an email address.

Passwords

- **Change Password Every __ Days.** Select this check box to enforce routine password changes.
- **Password Must Be At Least __ Characters Long.** Set a minimum length requirement for passwords.

Note: If SSO or LDAP integration is in place, you do not need to specify password rules. Passwords will be governed by the integration systems.

Login Notifications

- **Notify User of Last Successful Login Date and Time.** Select this check box to alert the user of the last moment when they successfully logged in to the system.
- **Notify User of Last Unsuccessful Login Date and Time.** Select this check box to alert the user of the last moment when they unsuccessfully logged in to the system.
- **Notify User of Any Security Related Changes to Their Account.** Select this check box to alert the user of any changes made to their account that involve account security.
- **Notify User of the Login Attempts in the Last __ Days.** Select this check box to alert the user of how many login attempts have been made within a specified span of time.

Session Inactivity Timeout

You may choose to enforce a time limit for inactivity. Specify how many minutes will pass before the system takes action.

- **None.** No actions will be taken; the timeout does not apply.
- **Locked.** The system is locked after the specified amount of time. The user is taken to a login screen and prompted to enter their password again to continue their work.
- **Logged Out.** The user is automatically logged out of the system after the specified amount of time.

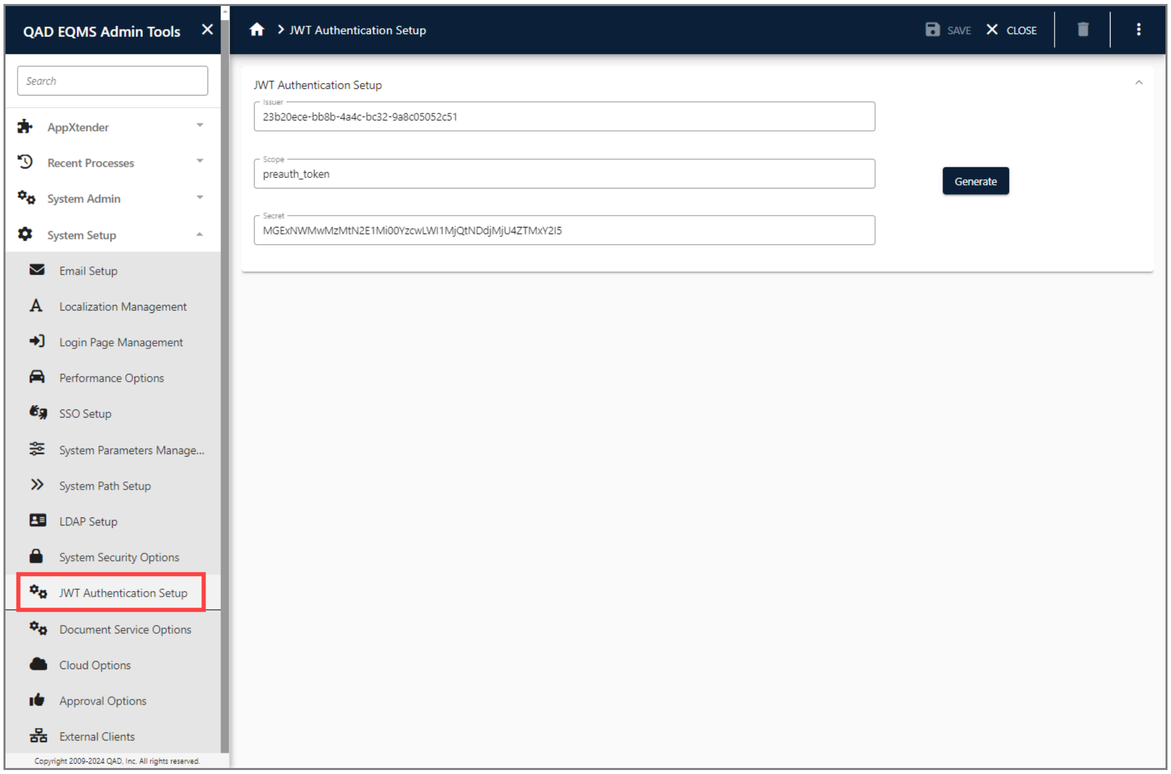
JWT Authentication Setup

The JWT Authentication Setup process allows you to organize the information necessary to set up JWT authentication. JWT, or JSON Web Token, is a standardized and self-contained way of transmitting information between multiple parties.

This setup process contains three fields:

- **Issuer.** Identifies the issuer of the token.
- **Scope.** The specific actions applications can be allowed to do on a user's behalf.
- **Secret.** The secret is a base64 encoded value used to create a symmetric key. A symmetric key is similar to a password and is kept on both the application and the authorization server that is issuing tokens.

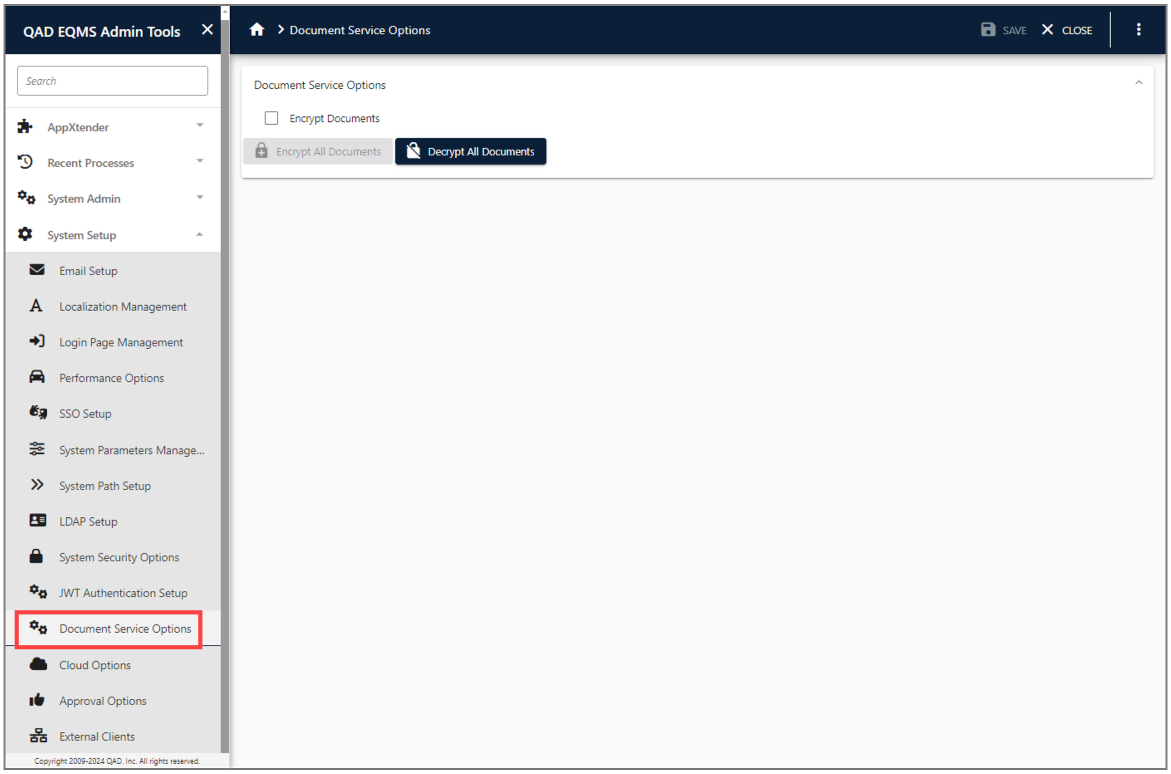
Fig. 41: JWT Authentication Setup screen



Document Services Options

The Document Services Options process provides the ability to encrypt document files (such as Documents and Drawings) stored within the user interface. When the Encrypt Files setting is enabled, every single document file in the EQMS system is encrypted.

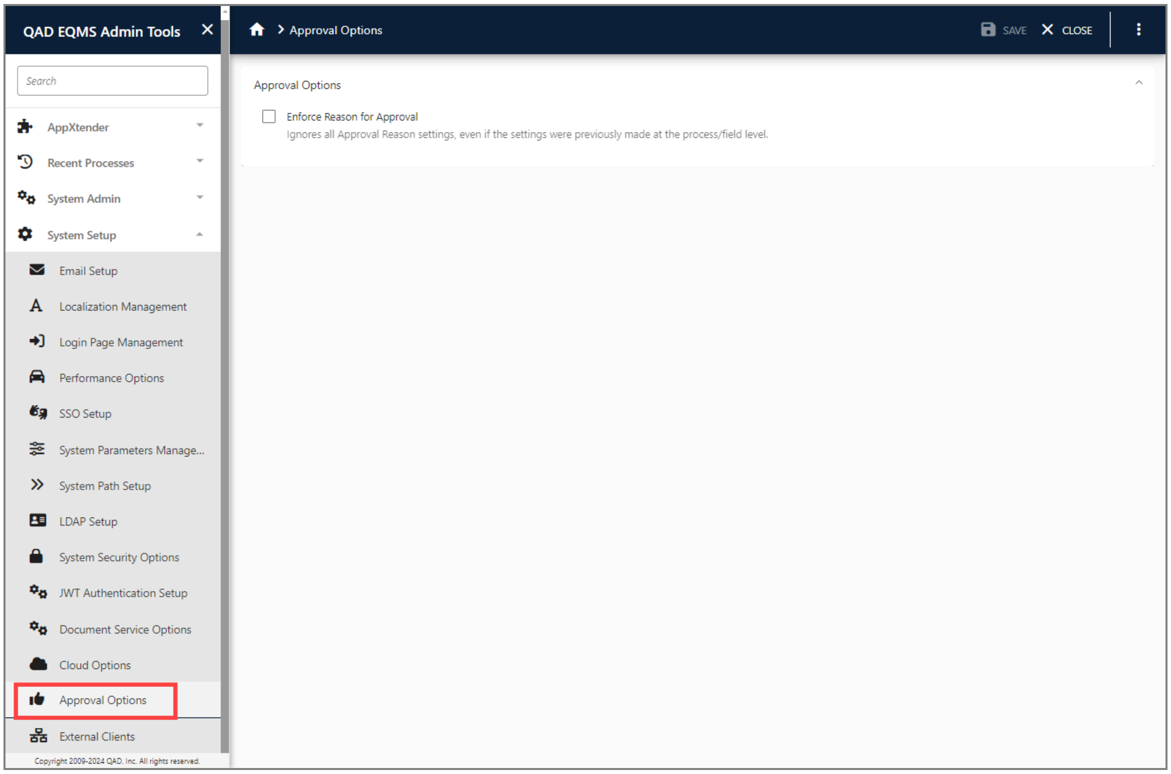
Fig. 42: Document Services Options screen



Approval Options

Within the end user application, certain processes require approval before they can move on to the next state. When conducting an approval, you may be required to provide a reason for your approval; this requirement is typically set at the process or field level settings. However, if the "Enforce Reason for Approval" check box is selected in the Approval Options process, then every approver must specify the reason for their signature, regardless of previous approval reason settings.

Fig. 43: Approval Options screen



Web.config Settings

In addition to the settings you can control in Admin Tools, there are some less often used settings that are controlled in the web.config file on the webserver. These setting changes must be performed by the QAD Service Delivery team; you can request these changes by logging a support ticket. Below is a description of those settings.

Deeplinks for HTML Clients

This setting is for the Web API site, and can be used in the SL website to force all deeplinks to point to the html client.

Key: WebClientUrl

Value: web client url

Example

```
<add key="WebClientUrl" value-
e="http://betaelements.qad.com/ghibli/"/>
```

Introduced in Version

#2017.30.13.1685

DisableContactsEmailList Key

When value is set for this key in the RT API config, email dialog's To and CC fields will not have autocomplete and Select Email buttons. Email addresses must be typed manually.

Key: DisableContactsEmailList

Value: true or false

Example

```
<add key="DisableContactsEmailList" value="true"/>
```

Introduced in Version

#2020.10.50.1864, #2020.41.50.580, #2020.42.50.666, #2020.43.50.207

AllowInboxApproval Key

When value is set to false for this key in the RT API config, users will not be able to Approve or Reject action items directly from the Inbox. Users must open the Details screen to approve.

Key: AllowInboxApproval

Value: true or false

Default value: true

Example

```
<add key="AllowInboxApproval" value="true"/>
```

Introduced in Version

#2022.46.13.4

Title for Runtime Client

The option exists to change the application title from "QAD EQMS" to something else. This application title appears on both the login page and the upper left corner of the user interface screen, above the navigation panel.

Chapter 4

Publish and Deploy

Publish and Deploy

Once you have created changes that you want your users to begin to utilize, the final step is to publish and deploy those changes. Publishing takes the changes you have built and compiles them so the rest of AppXtender recognizes them. This is also the time in which the application tests the changes to ensure they will build properly.

Most users will also select the deploy option at this time. Deploy is the last step in making the changes available to users. Prior to deploying, the changes only exist within AppXtender.

Fig. 44: Publish Options window

When you are ready, save the process then click the Publish button in the Home screen or the main navigation menu. A new window appears; click the Deploy toggle, then select Publish. A new window appears.

Fig. 45: Publish Status window

In the new window, you can see the publish status. Every change made is calculated and appears on this screen. When the system is finished, the final line item reads “Publish completed successfully”. You can close the window, or copy the publish status details to your clipboard for your records.