



QAD Adaptive Applications

# Technical Reference **QAD EQMS Data Load**

70-3475-2025

QAD EQMS 2025

March 2025

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# QAD EQMS Data Load Technical Reference Change Summary

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

<b>Date/Version</b>	<b>Description</b>	<b>Reference</b>	<b>Changed By</b>
SEPT 2020/v2020.1	Initial upload	--	NQC
MAR 2021/v2021	Updated versioning	--	NQC
SEPT 2021/v2021.1	Updated versioning; Updated Appendix	p. 22	FFV
MAR 2022/v2022	Updated versioning	--	FFV
SEPT 2022/v2022.1	Updated versioning; SaaS Changes	p. 13	FFV
MAR 2023/v2023	Updated versioning	--	FFV
MAR 2024/v2024	Updated versioning	--	FFV
SEPT 2024/v2024.1	Rewrite of guide as utility has had major updates.	--	FFV
MAR 2025/v2025	Updated versioning	--	FFV

Chapter 1

# Introduction to Data Load

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## Introduction

The QAD EQMS Data Load application is designed to allow administrative users to organize, validate, and load data into many of the latest QAD EQMS applications.

### About This Guide

This user guide focuses on:

- Prerequisites for using QAD EQMS Data Load Management.
- Capabilities and limitations of QAD EQMS Data Load Management.
- Process flow for QAD EQMS Data Load Management.
- Detailed review of each screen and function of QAD EQMS Data Load Management.
- Instructions and tips for using QAD EQMS Data Load Management.

## Prerequisites for QAD EQMS Data Load Management

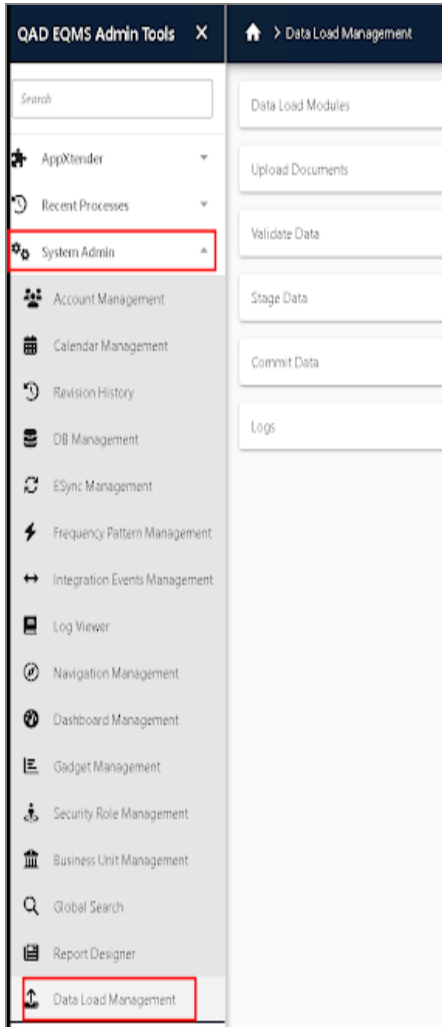
### Hardware and Software Requirements

The new version of QAD EQMS Data Load Management is now part of AdminTools. See our [QAD EQMS Hardware and Software Requirements](#) technical reference for requirements.

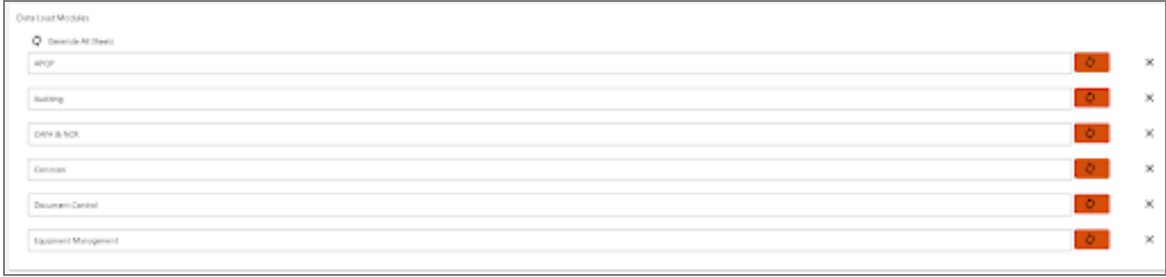
## Capabilities of QAD EQMS Data Load Management

The QAD EQMS Data Load Management tool allows administrative users of the latest version of QAD EQMS to complete the following actions:

- **Connect to the latest QAD EQMS environment.** Data Load Management is now part of Admin Tools. Log in with an administrator account. Data Load Management is located under the System Admin menu.



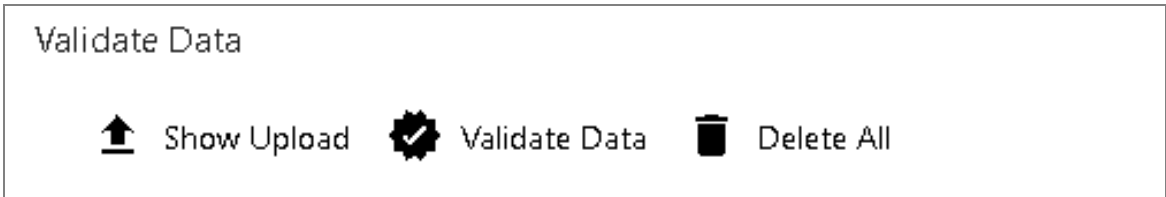
- **Download Templates.** The Data Load Management provides a link to download the latest templates for each supported application in the EQMS product. The templates are used to collect, structure, and validate the data intended to be loaded into your QAD EQMS environment. The templates, which use Microsoft Excel (.xlsx files), are pre-structured spreadsheets. They are strictly defined, so the data being collected matches precisely with the data structure of QAD EQMS.



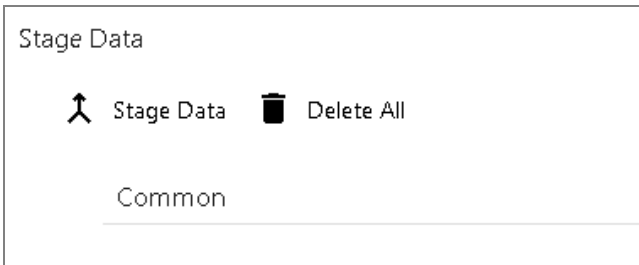
- **Upload Documents.** If you have documents to upload alongside the sheets, you can now do so with Data Load Management.



- **Validate Templates.** Before the collected data is loaded into the QAD EQMS environment, the Data Load Management assists the user with the validation of data within the Data Load Template. This process verifies if the data meets requirements and standards for the latest QAD EQMS product. If any issues with the data exists, this function will help quickly identify those issues.



- **Execute Data Load into QAD EQMS.** Once the Data Load Templates have been validated, the data load can be executed from the Data Load Management by selecting the Upload Data option. Once initiated, the tool will begin to load data into the QAD EQMS environment.



## Chapter 2

# Using Data Load Management

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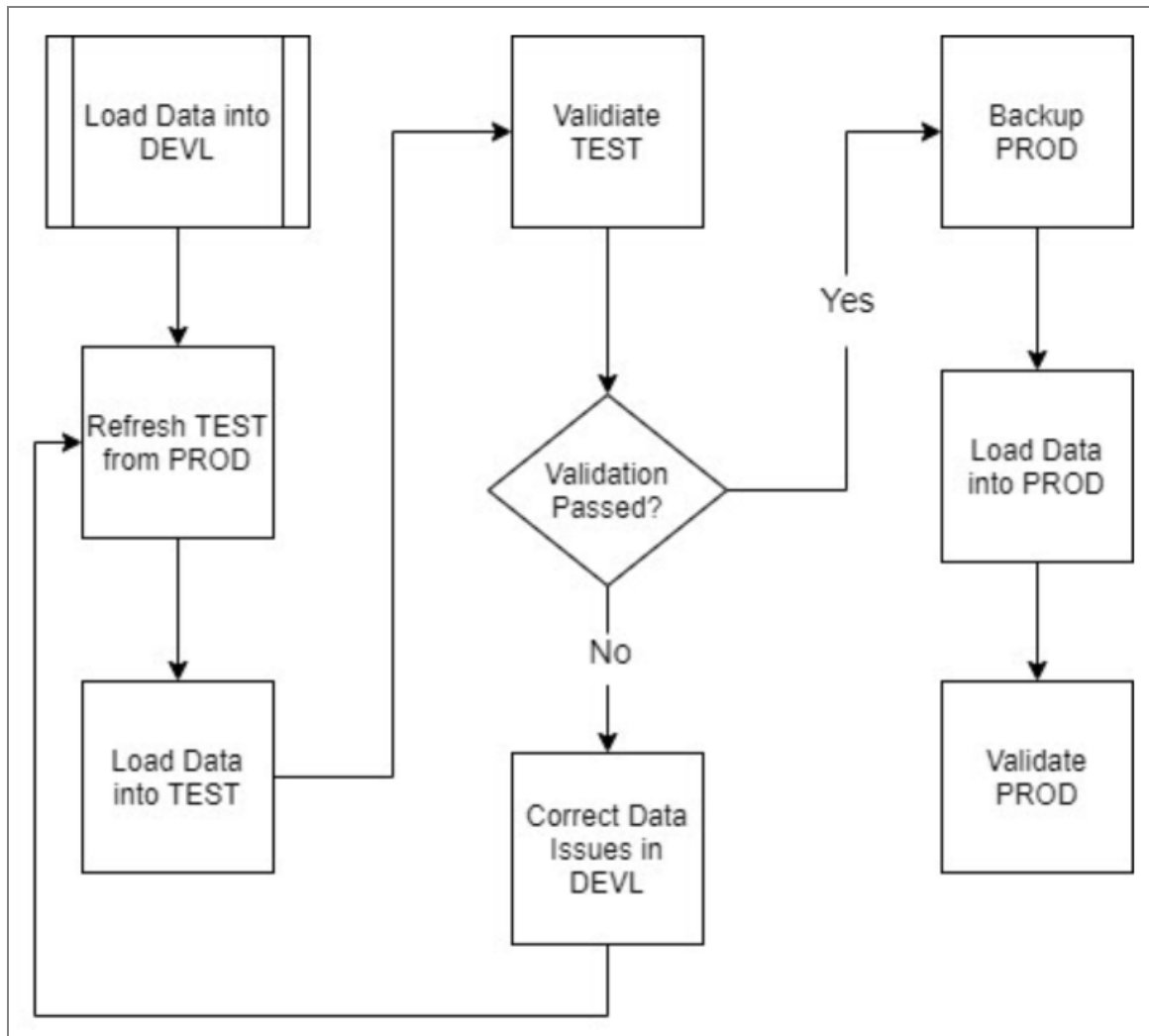
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## Process Flow



### Load Data Into DEVL

At this stage, the data load process is executed into the DEVL environment.

### Refresh TEST from PROD

This stage is performed to prepare the test environment to be loaded with data.

### Load Data into Test

At this stage, the Data Load Management is used on the TEST environment, which has been refreshed with PROD data.

### Validate TEST

During the validation phase, a determination is made as to whether or not the validation passes.

## **Correct Changes in DEVL**

If validation fails, corrections must be made in PROD and steps retaken up to the Validate Test stage.

## **Validate TEST**

If validation passes, then the process flow moves to the next step.

## **Backup PROD**

This is the next step in the process flow after passing validation. At this stage, back up databases before importing any data in the PROD environment.

## **Execute Data Load into PROD**

At this stage, the Data Load Management will be used in the PROD environment.

## **Validate PROD**

The validation process within PROD occurs at this stage.

# **Instructions**

## **Best Practices**

### **Before Starting the Data Load Management**

- Confirm the version of the targeted QAD EQMS environment to be loaded with data. (QAD EQMS Data Load Management is only compatible with QAD EQMS 2024.1 and later).
- Confirm the URL of the targeted QAD EQMS environment. There are typically three environments of the QAD EQMS installed (DEVL, TEST, and PROD).

## **Connecting to QAD EQMS**

### **Requirements for Connecting to QAD EQMS**

- System admin user credentials for the target QAD EQMS environment.

## **Downloading the Data Load Templates**

### **Requirements for Downloading Templates**

- Internet connection
- List of all required applications to be loaded (e.g. Document Control, Training Management, APQP).

## Populating the Data Load Templates

The standard Data Load Template for all applications is comprised of several rows and columns. Below are the common components in all Data Load Templates:

- **Prerequisites.** The required applications and processes for the Data Load Template being used. These listed processes must be included, or already loaded into the latest QAD EQMS environment, in order to complete the Data Load using this template.
- **Process Documentation.** A short description of the process or application in the QAD EQMS.
- **Field Documentation.** A short description of the purpose of the process fields in the QAD EQMS.
- **Field Type.** The data type used for the field in the QAD EQMS database (e.g. String, Integer, Boolean, etc.).
- **Field Options.** Configurable parameters related to the process or application field in QAD EQMS. The populated data must be within these parameters. If the value exceeds the parameters, the Data Load sheet will fail validation.
- **Unique Value.** This designation on a column means the value for the field is required to be unique. If duplicate values exist, the Data Load sheet will fail validation.
- **Required Value.** This designation on a column means a value for a field is required for a record. If blank values exist, the Data Load sheet will fail validation.
- **Cross-Ref Process.** If applicable, the process that the QAD EQMS field is cross-referencing in another QAD EQMS process is noted in this column.
- **Match Field Name.** The field name of the value to be loaded. This name is typically displayed beside the input field in the QAD EQMS display screen of the record.

## Validating the Data Load Templates

### Requirements for Downloading Templates

- Connection to the latest QAD EQMS environment.
- Completed validation template files for all desired applications.

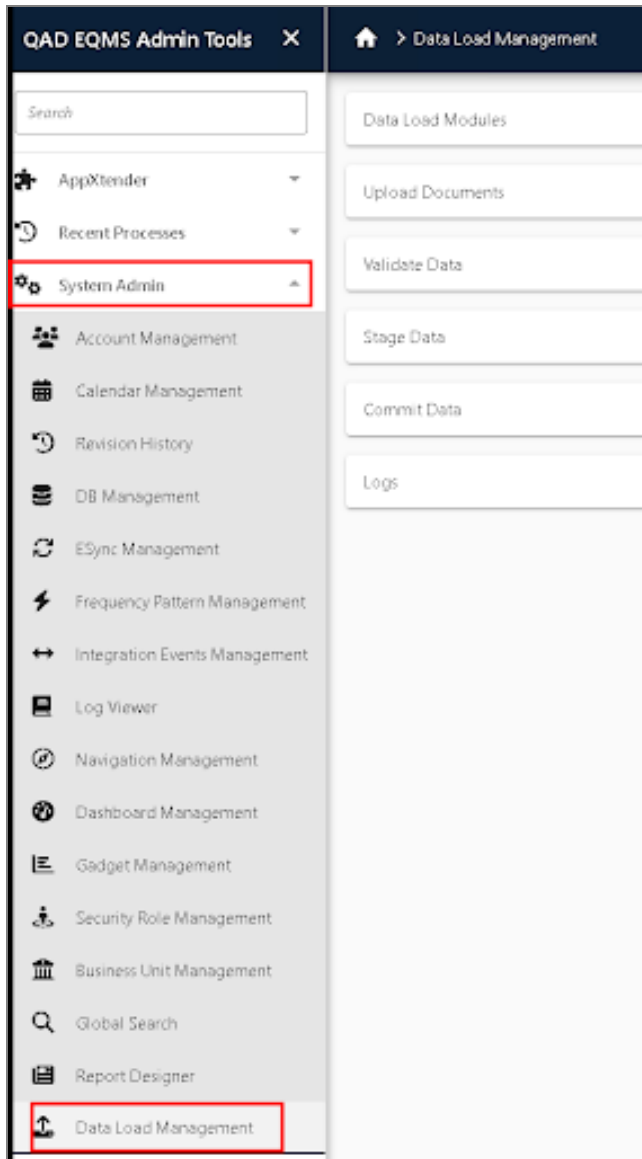
## Guided Steps

### Main Menu

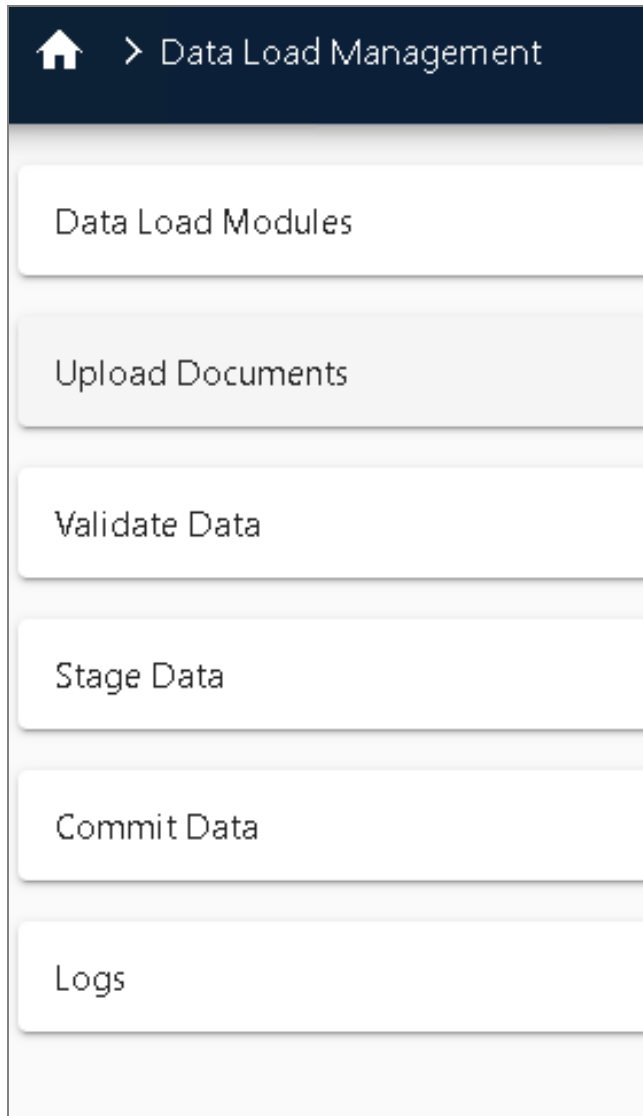
#### Step 1: Connect to the QAD EQMS Environment

Data Load Management is now part of Admin Tools. Log in with an administrator account. Data Load Management is located under the System Admin menu.

**Fig. 1: Data Load Management in Admin Tools**



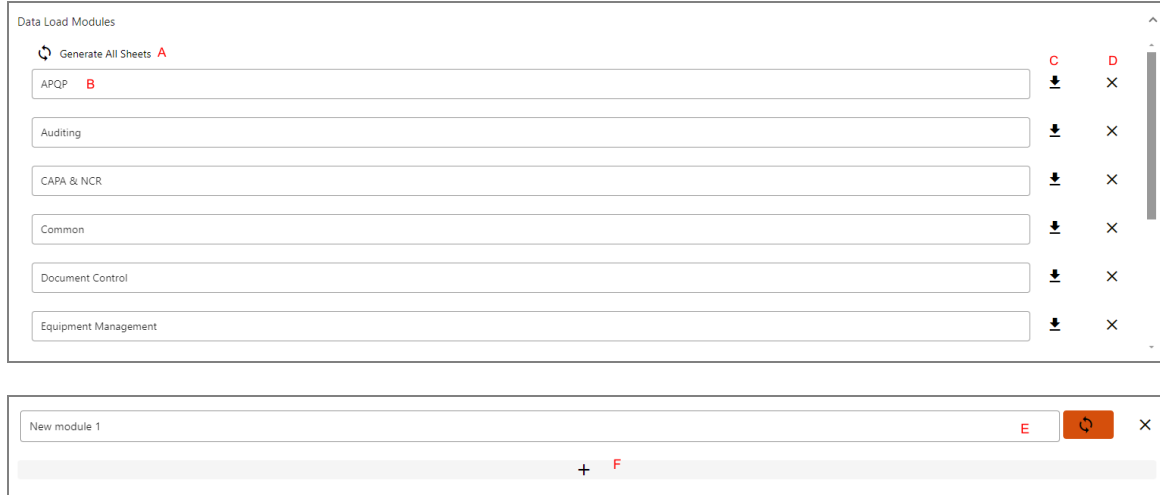
Below is a screen shot of the main menu after you log in. The following steps will be referencing this figure.

**Fig. 2: Data Load Management, Main Page****Step 2: Download Templates (Data Load Modules)**

The first step of the Data Load process is to download the respective templates of the desired application data to be loaded. Select Data Load Modules from the main menu, which contains a listing of modules.

Next, you must generate the sheets. There are two ways to accomplish this task:

1. Click the Generate All Sheets button at the top
2. Click the Refresh button at the right of the individual modules. Once the sheets are refreshed, a download button becomes available next to each module, allowing you to download the Excel spreadsheet of the module.

**Fig. 3: Data Load Management, Data Load Modules screen**

- A. **Generate All Sheets.** Click this button to generate sheets for all modules listed.
- B. **Module Name.** this is the name of the module. You can edit or modify the modules to your liking. The default modules that come with the product are shown.
- C. **Download Template Sheet.** Allows the user to download the template sheet for this particular module.
- D. **Delete Module.** Allows the user to delete the module.
- E. **Generate Module Sheet.** Allows the user to generate the template sheet for this particular module.
- F. **Add a New Module.** Clicking this will allow you to create a new module.

### Step 3: Upload Documents

In certain processes, there are document file fields (such as Documents – Document File Field). If you want to upload document files along with your data load sheets, then you should select Upload Documents from the main menu.

From this menu, you will see the Show Upload button. Click this button to show the Upload Files pane, which contains a new button: Select Files. Click Select Files to show a file upload dialog box, which allows you to select the files you want to upload. You can also drag and drop files into this pane to upload the documents. After this is complete, you will see the uploaded files below the Upload Files pane.

Fig. 4: Data Load Management, Upload Documents tab

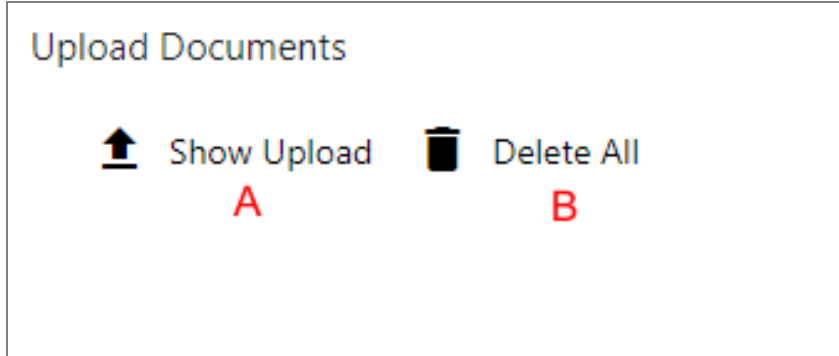
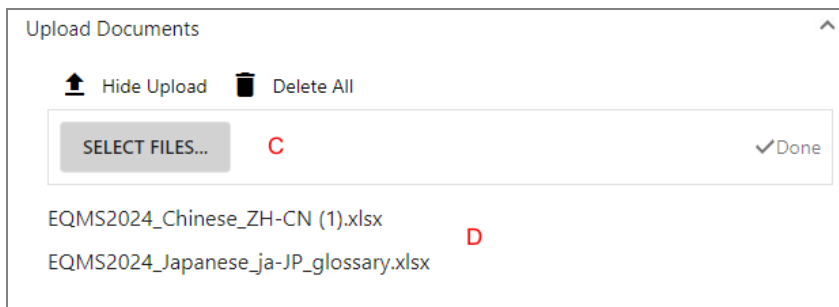


Fig. 5: Data Load tool, Upload Documents tab, Showing Files



- A. **Show/Hide Upload Files Pane.** Click this button to show or hide the "C" pane, which allows you to upload files.
- B. **Delete All.** Allows you to delete all uploaded files.
- C. **Upload Files Pane.** Click Select Files or drag files into this pane to upload files to the server.
- D. **File Listing.** Allows the user to see which files have been uploaded.

#### Step 4: Validate Templates

After the Data Load Template file is populated with the collected data, you must verify if the data meets the necessary requirements for the QAD EQMS product. This is accomplished by uploading the populated Data Load Template file into the Data Load Validate Data function.

Begin by selecting the Validate Data option from the Main Menu, where you must load the individual Data Load Templates files for each application into the Data Load Management.

On the Validate Data page, click the Show Upload button to reveal the Upload Files pane. You can either drag and drop the template sheets in this pane or click the Select Files button to display an upload file dialog box so you can navigate to the template sheet to upload. After the templates are uploaded, you can see it listed below the pane.

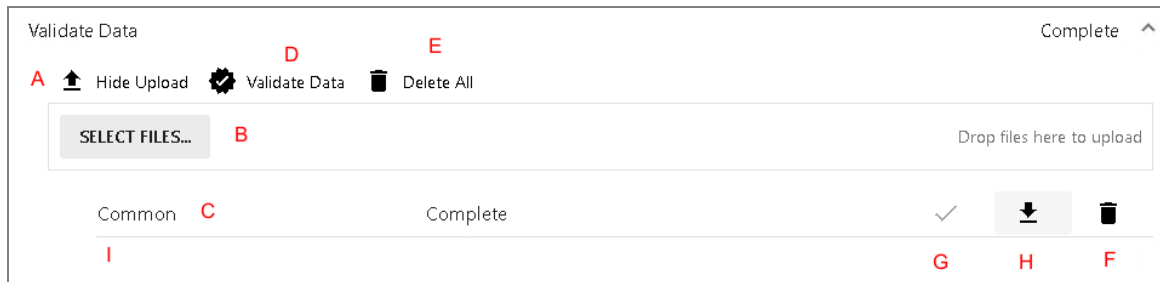
Click Validate data to start the validation process, which should not take long to perform. If this process finds validation errors, you can click the ! icon, which lists the validation errors it finds. From here, you can download the sheet using the download icon. Within the sheet, you will find a Validation Report tab, which will help you find and identify the problems in your sheet. After

fixing the validation errors, you can delete the old template sheet and upload a new copy to re-validate again. Repeat this process until no validation errors appear.

**Note:** All uploaded template sheets are validated together. Checkbox is only used for selecting sheets you want to delete.

### Validation Selection

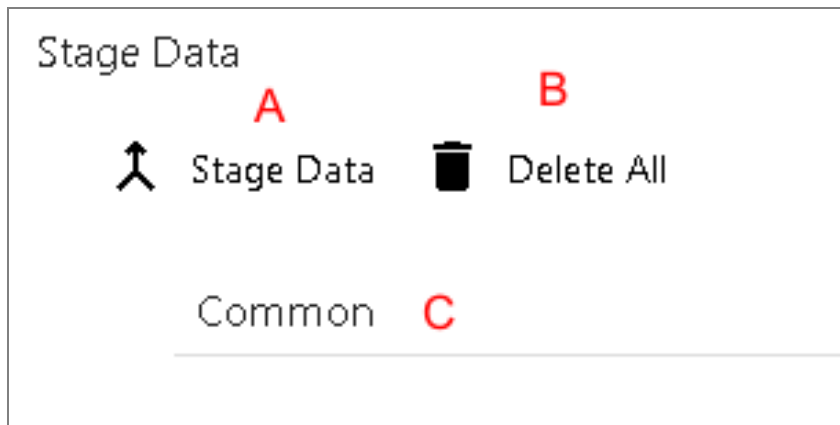
Fig. 6: Data Load Management, Validate Data screen



- A. **Show/Hide Upload Files Pane.** Shows or hides the upload Files pane.
- B. **Upload Files Pane.** Allows users to upload template sheets to be validated.
- C. **Template Sheets to be validated.** This shows the sheets you have uploaded that are to be validated.
- D. **Validate Data.** Start the Data Load Template Validation process.
- E. **Delete All.** Removes all template sheets from the server and removes them from the screen.
- F. **Delete Specific.** Removes specific template sheets from the server and from the screen.
- G. **Validation Status icon.** Shows if Validation completed successfully or produced validation errors. If the "I" icon is shown, click this icon to show the validation errors on screen.
- H. **Download Template Sheet.** Click this icon to download the template sheet.
- I. **Validation Errors Review.** A preview of any validation errors appears in this space.

### Step 5: Stage Data

Fig. 7: Data Load Management, Stage Data



- A. **Stage Data.** Load all modules listed.
- B. **Delete All.** Remove all sheets listed.
- C. **List of Modules to be Data Loaded.** After validation is complete, view all validated modules listed here.

After successfully validating all sheets, the tool loads the sheets in the Stage Data section. You can proceed with executing the data load into the targeted QAD EQMS environment.

Select stage Data when ready.

**Fig. 8: Data Load Management, Stage Data has been started**



### Step 6: Verify Data Load

Once the data load is complete, you will receive a "Success!" message from the Data Load Management. You can see the latest progress in the Commit Data section.

**Fig. 9: Data Load management, Commit Data**

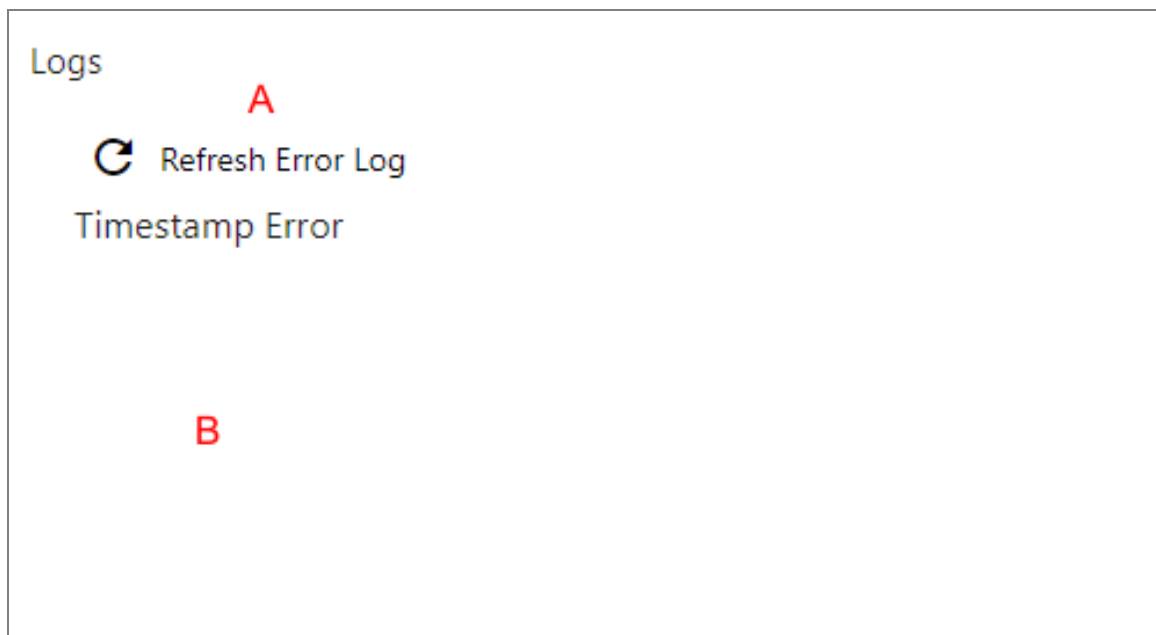


- A. **Refresh.** Show the current status of the last or in progress data load.
- B. **Current/Last Status.** The current/last status of the data load.

### Step 7: Logs

This section shows any information and error messages that occurred during the data load.

**Fig. 10: Data Load management, Logs**



- A. **Refresh Log.** Refresh the log shown on screen.
- B. **Log.** Status information and any errors will appear here.

Chapter 3

# AppXtender

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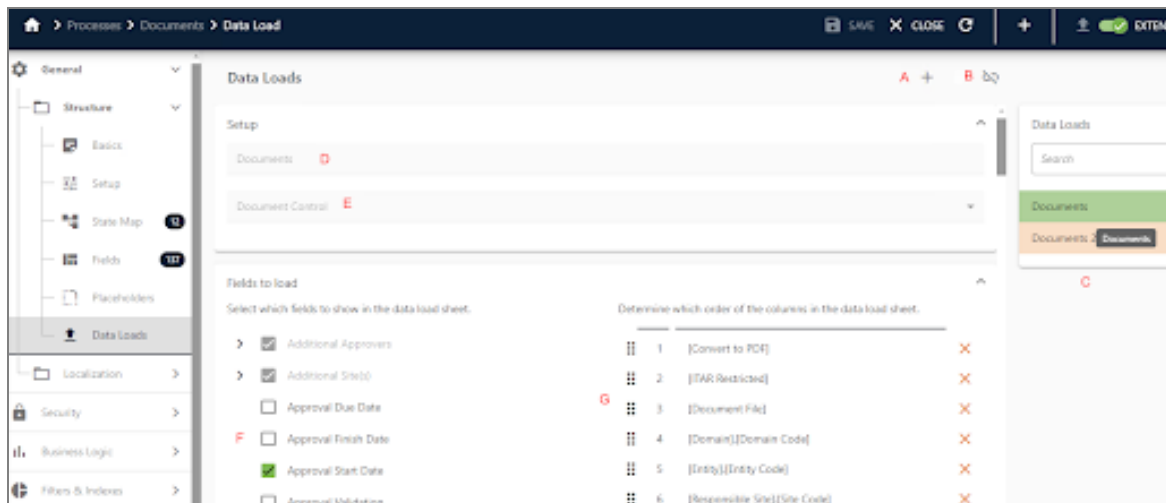
# AppXtender

In AppXtender you can customize the existing Data Load Configuration or add your own. The options are explained below.

## Data Loads Menu

Within Data Loads, you can add your own data load configuration or extend and modify the existing data load configuration that was shipped with EQMS.

**Fig. 11: AppXtender, Processes, Data Loads**

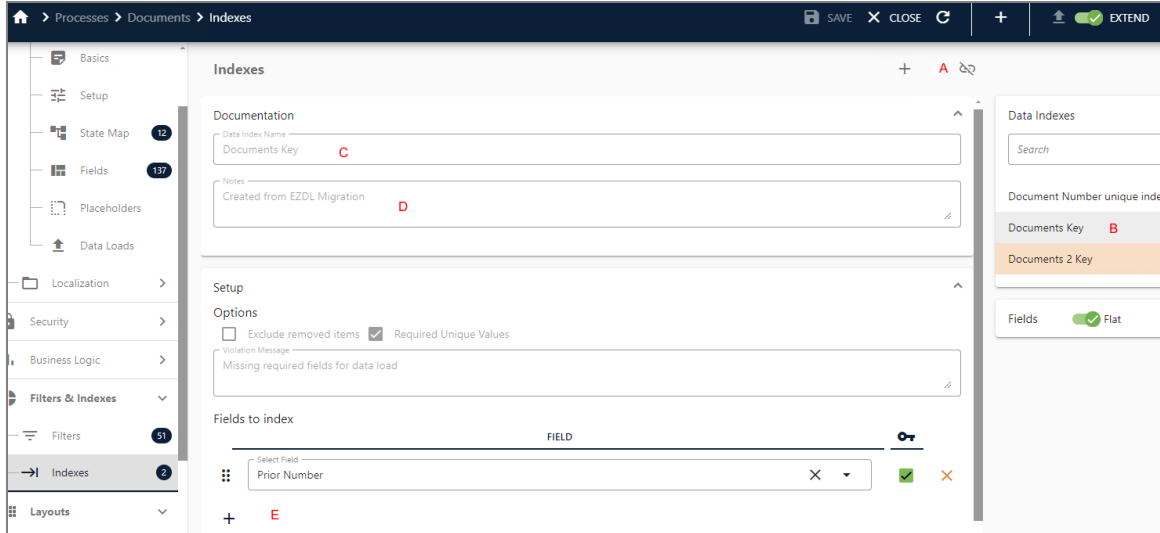


- A. **Add New Configuration.** Click here to add a new data load configuration.
- B. **Override.** You can override and make modifications to base configurations.
- C. **Data Load Configurations.** Lists all the data load configurations that belong to this process.
- D. **Name.** Name of the data load configuration.
- E. **Module.** Every data load configuration must belong to a module. Select the module to which you would like this configuration to belong.
- F. **Field Selection.** All fields belonging to the process are listed here. You can select which fields you want to include in the data load configuration.
- G. **Column Order.** You can change the order in which the fields populate the Excel spreadsheet.

## Indexes (Data Load Keys)

Under Filters & Indexes is a special index created specifically for use with data load configurations. A new index key is added when you create a data load configuration. Each key is named using the data load configuration name with 'Key' at the end (e.g. Documents Key). Within the Indexes process, you can identify the key match. If the keys match, then the existing record will be updated. If no match is found, then it will be added as a new record.

Fig. 12: AppXtender, Processes, Indexes



- A. **Override.** You can override and make modifications to base configurations.
- B. **Data Load Index.** The index is named after the data load configuration name with 'Key' added afterwards.
- C. **Name.** Name of the data load key (not editable).
- D. **Notes.** A notes field you can modify as you see fit.
- E. **Field Selection.** Modify existing key fields, or add new ones by clicking the + button if you want multiple keys.