



QAD Adaptive Applications

User Requirements Specifications
QAD EQMS Applications
Training Management

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Training Management User Requirements Specification Change Summary

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

Date/Version	Description	Reference	Changed By
JULY 2020/v2020	Initial upload	--	RQT
NOV 2020/v2020.1	Updated versioning; Added a "System Shall" statement to the Training Events section; Added a General section.	p. 8, p. 10	RQT
MAR 2021/v2021	Updated versioning.	--	RQT
AUG 2021/v2021.1	Updated versioning; Updated the Employee section.	p. 7	RQT
MAR 2022/v2022	Updated versioning; Updated the Training Events section; Updated the Employees section; Updated the Employee Titles section; Updated the Setup section; Updated the Reports section; Updated the Metrics section.	p. 8, p. 7, p. 7, p. 9, p. 9, p. 9	RQT
SEPT 2022/v2022.1	Updated versioning; Updated the General section	p. 10	RQT
MAR 2023/v2023	Updated versioning; Updated the General section	p. 10	RQT
MAR 2024/v2024	Updated versioning; Updated the General section	p. 10	RQT

Date/Version	Description	Reference	Changed By
SEPT 2024/v2024.1	Updated versioning; Updated the Training Events section; Updated the Skills section; Updated the General section	p. 8, p. 8, p. 10	RQT
MAR 2025/v2025	Updated versioning; Updated the Employees section; Updated the General section	p. 7, p. 10	RQT

Confidentiality

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Purpose

This requirements specification includes the documentation of the EQMS Applications business requirements for the EQMS Training Management Module version 2025.

This document was used as the basis for the configuration of the Training Management Module and shall be used in the definition of testing criteria for operational qualification.

Scope

The scope of this document is to define the EQMS Applications business requirements for the Training Management Module version 2025.

Training Management

Coordinates the training activity to meet quality management standards. The application helps ensure that personnel are trained on the policies, procedures, and regulations relevant to their work area or job junction, training assessments are current, and employee certifications are maintained. The application also facilitates the management of employee training needs and the training schedules necessary to fulfill those needs.

Employees

1. The system shall have the ability to maintain basic employee information such as name and email address.
2. The system shall have the ability to define the system security roles that apply to the employee.
3. The system shall have the ability to define who the employee reports to.
4. The system shall have the ability to store an image of the employee and employee's signature.
5. The system shall have the ability to document one or more employee events for each employee.
6. The system shall have the ability to document the employee's title.
7. The system shall have the ability to document a succession title for the employee for the purposes of establishing ongoing employee development and succession planning.
8. The system shall have the ability to view what skills the employee has and what their current and required rating is.
9. The system shall have the ability to add skills to an employee that are not necessarily required by a role or position.
10. The system shall have the ability to view required training filterable by required training, skills, employees, and roles.
11. The system shall have the ability to certify an employee to one or more training roles.
12. The system shall allow the employee to select a delegate and the system will assign existing and new tasks to the delegate when out of office (added in 2019).
13. The system shall allow the employee to be assigned additional sites (added in 2019).
14. The system shall allow the employee record to indicate they are ITAR (added in 2019).
15. The system shall allow employee skills based on a department or the person the employee reports to (added in 2021.1).
16. The system shall allow succession training roles to be linked to an employee (added in 2022).
17. The system shall allow employees to specify a start and an end date for an Out-of-Office absence (added in v2025).

Employee Titles

1. The system shall have the ability to document skill requirements by training role.
2. The system shall require an approval to add or remove skills to a training role.
3. The system shall have the ability to define the performance measures to be certified for a training role.
4. The system shall have the ability to assign one or more required training roles to an employee title.

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5. The system shall have the ability to create backup personnel for an employee title.
 6. The system shall have the ability to document the basic job description for an employee title.
 7. The system shall have the ability to have site specific training requirements for a single employee title (added in 2022).

Skills

1. The system shall have the ability to document one or more skills.
2. The system shall have the ability to define the expiration frequency for a skill.
3. The system shall have the ability to associate skills to a document.
4. The system shall have the ability to define one or more training questions for a skill.
5. The system shall have the ability to create multiple choice questions for tests.
6. The system shall have the ability to link a skill to one or more training roles.
7. The system shall have the ability to document the performance steps for a skill for the purposes of validating employees complete these steps during a certification.
8. The system shall provide the ability to embed videos in Skills (added in 2024.1).

Training Events

1. The system shall have the ability to document training that has occurred for one or more employees.
2. The system shall have the ability to indicate who led the training as either an internal person or a supplier.
3. The system shall have the ability to indicate which document led to the automatic creation for a training event.
4. The system shall have the ability to have training automatically required when a document changes if the owner/approvers determine that retraining is required.
5. The system shall have the ability to document that one or more skills were trained on as part of a training event.
6. The system shall have the ability to load the attendees based on the skills selected for the training event.
7. The system shall have the ability to load the skills based on the attendees selected for the training event.
8. The system shall have the ability to maintain the employee to skill matrix and update their current rating based on the training event.
9. The system shall have the ability to approve a training event prior to being closed.
10. The system shall have the ability to capture the cost of a training event.
11. The system shall have the ability to require a test be completed to determine the new rating of an employee/skill combination after a training event.
12. The system shall have a link to view the document on a user's training event log so they can open and view it for the purposes of self-directed training on the document (added in 2020.1).
13. The system shall have the ability to create training events based on training role(s) (added in 2022).
14. The system shall notify the training event attendees when the event is scheduled (added in 2022).

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15. The system shall default the training event approver with the person listed as the organizer/trainer (added in 2022).
 16. The system shall allow users to request training on specific skills (added in 2022).
 17. The system shall indicate the correct response to the employee when they incorrectly respond to a training evaluation question (added in 2022).
 18. The system shall provide the ability to embed videos in Training Events and Training Event Logs (added in 2024.1).

Setup

1. The system shall have the ability to define one or more skill types for the purposes of organizing skills and setting up the test score to rating matrix.
2. The system shall have the ability to define one or more skill ratings for the purposes of having a standardized way to rate each employee/skill combination.
3. The system shall have the ability to define one or more training event types for the purposes of organizing training events and setting up options for training events.
4. The system shall have the ability to define one or more employee event types, including defining a checklist for the event type.
5. The system shall have the ability to define one or more certification performance measures for the purposes of having a standardized list of measures for certifications.
6. The system shall have the ability to define one or more certification event frequencies for the purposes of defining intervals of when certifications should take place.
7. The system shall allow the following setup table to specify a domain, an entity, and 1 or more sites they apply to: Employee Titles, Training Roles, Skill Types, Skills, and Training Event Types (added in 2022).

Metrics

1. The system shall have the ability for a manager to find employees with the skills they currently need fulfilled (by specific skill or training role) (added in 2022).
2. The system shall have a dashboard that provides the ability for managers to have a dashboard of what the individuals need in their department from skills most needed to the next most needed (added in 2022).
3. The system shall have a dashboard for the current user showing: what they need to be trained on, training events completed, employee certifications completed, total accumulation of points earned on training event logs (added in 2022).

Reports

1. The system shall have a report to print an employee's "succession plan" which will show an employee's required skills to move to a particular position.
2. The system shall have a report to print a title organizational chart showing title, reporting relationships, and position responsibilities.
3. The system shall have a report to print the "path" or required skills and skill level to qualify for a position.
4. The system shall have a report to be printed and signed indicating an employee has been trained at a particular event.

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5. The system shall have a report to print a matrix of required skills by employee, position, and/or department.
 6. The system shall have a report to print a list of who qualifies to serve as "backup" of any particular position.
 7. The system shall have a report to print the number of training hours by department, by site.
 8. The system shall have a report to print the number of training hours by department.
 9. The system shall have a report to print an employee detail report including training status and history.
 10. The system shall have a report for training events that can be used as a sign in sheet for attendance (added in 2022).

General

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