



QDMS

Project Document
Management System

GUIDED TOUR

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Chapter 1 - Introduction

1.01 Introducing QDMS

1.02 Highlights

1.03 How to get started with QDMS

1.01 Introducing QDMS

In any Drawing Office, on any Construction Site, or in fact anywhere else where there are large quantities of documents, there will be a **Register of Documents**. With time, documents are revised, new documents are created, and documents become superseded. The document register is continually updated to reflect these changes.

When documents are issued from one party to another, they are generally issued under a transmittal. This is a cover sheet that lists the issued documents, their status, the reason for issue etc. A transmittal is the means by which document issues are controlled.

QDMS is a **Document Management and Transmittal System** developed by **QA Software** to electronically maintain a document register, to generate transmittals for the issue of new documents, and to manage the distribution of revised documents.

Though this may sound simple, in today's fast track environment, control of documents is fundamental to the smooth operation of any Project and is often managed badly. Handwriting of transmittals is time consuming and a manually maintained distribution matrix, (or more common still, a distribution matrix held only in someone's memory) is prone to error and potential disaster.

QDMS is a powerful and flexible PC based system. It has been designed to be as simple to use as possible while offering the maximum power for the advanced user.

QDMS has been developed to assist companies in meeting the requirements of ISO 9000 standards for document control, but offers far more than the means of simply meeting this standard.

1.02 Highlights

QDMS is special because it has been developed on the job. People actually doing document control have written it.

QDMS displays information in a spreadsheet format that enables the user to see multiple records at a glance. Flexibility has been considered of primary importance. Data can be browsed, or reports generated in a wide variety of ways. A powerful filter generation facility is incorporated for editing or reporting on selected information only.

QDMS generates an audit trail for all revisions to documents and document issues.

Data entry with QDMS is rapid with single line or batch entry for new documents. Documents are selected for generating transmittals by simply tagging the documents in the Document Register. The distribution of revised documents is almost completely automated. Full automation has not been implemented in order to provide the user with the final control button.

Importing and Exporting from and to other systems is a built-in feature of QDMS. The system can generate electronic transmittals that can be imported by other users. All, or only selected records within any QDMS data file can be exported from within the system to most popular software packages such as Excel, Lotus, etc.

QDMS is designed so that you can access the information you want quickly and the system operates with standardized Tool buttons for maximum user-friendly operation. In an environment with electronic versions of drawing files, QDMS has an optional viewer which can read most of the common CAD file formats. The viewer also has red lining facilities which can be controlled per user.

1.03 How to get started with QDMS

QDMS requires installation of some software. This can be obtained from www.qa-software.com or by contacting QA Software on:

Phone: +61 (3) 9326 8455

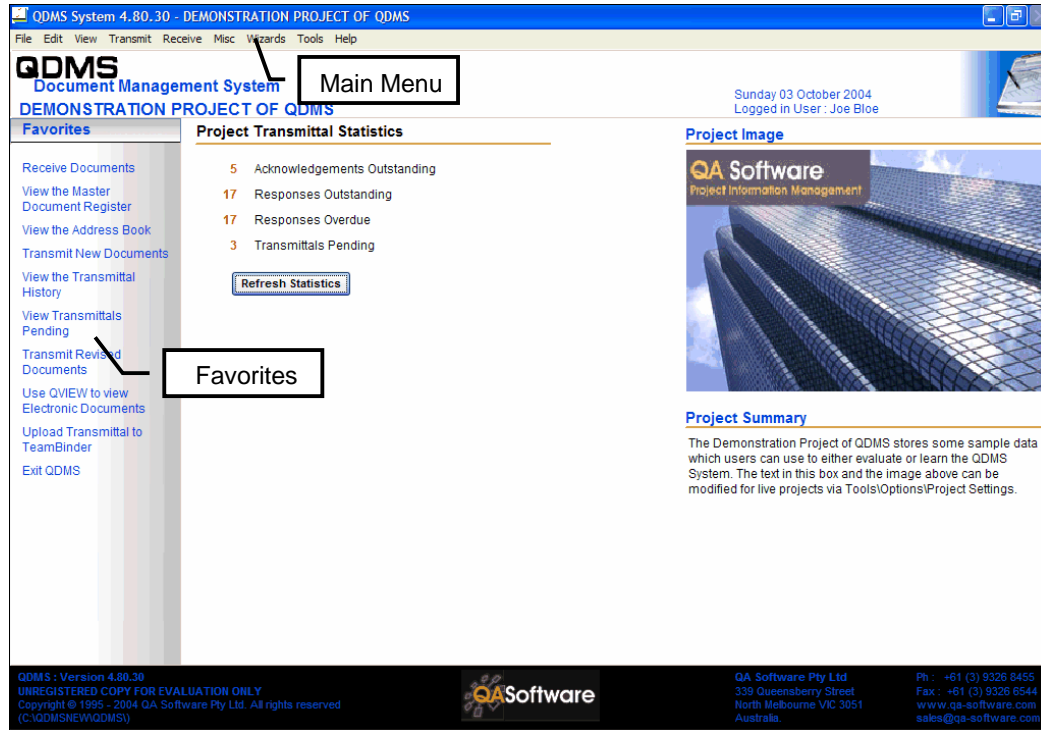
Fax: +61 (3) 9326 6544

Email: sales@qa-software.com

Use the **Quick Start** Instructions contained in Appendix A at the end of this document to Install the Software.

Chapter 2 – QDMS Simple Guided Tour

- 2.01 About the QDMS Guided Tours
- 2.02 Login
- 2.03 The Master Document Register
- 2.04 Adding a New Document
- 2.05 Creating a Recipient
- 2.06 Generating a Transmittal
- 2.07 View the Transmittal History
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- 2.09 The Document History File
- 2.10 Transmittals Pending
- 2.11 Transmitting Revised Documents
- 2.12 View Transmittals Detailed again
- 2.13 Exiting QDMS



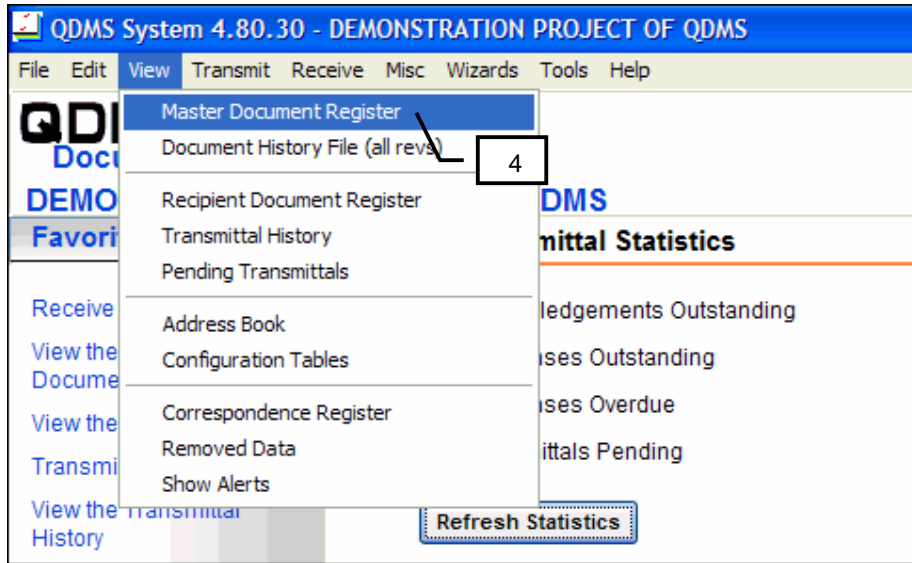
The above screen is called the **QDMS Dashboard**. At the top of the screen is the **Main Menu**.

Displayed as a list under **Favorites** are some commonly used QDMS menu items. These menu items are fully customisable for each user. During the guided tour you should use the main menu options rather than the short cuts on the Favorites list to gain familiarisation with the menu system.

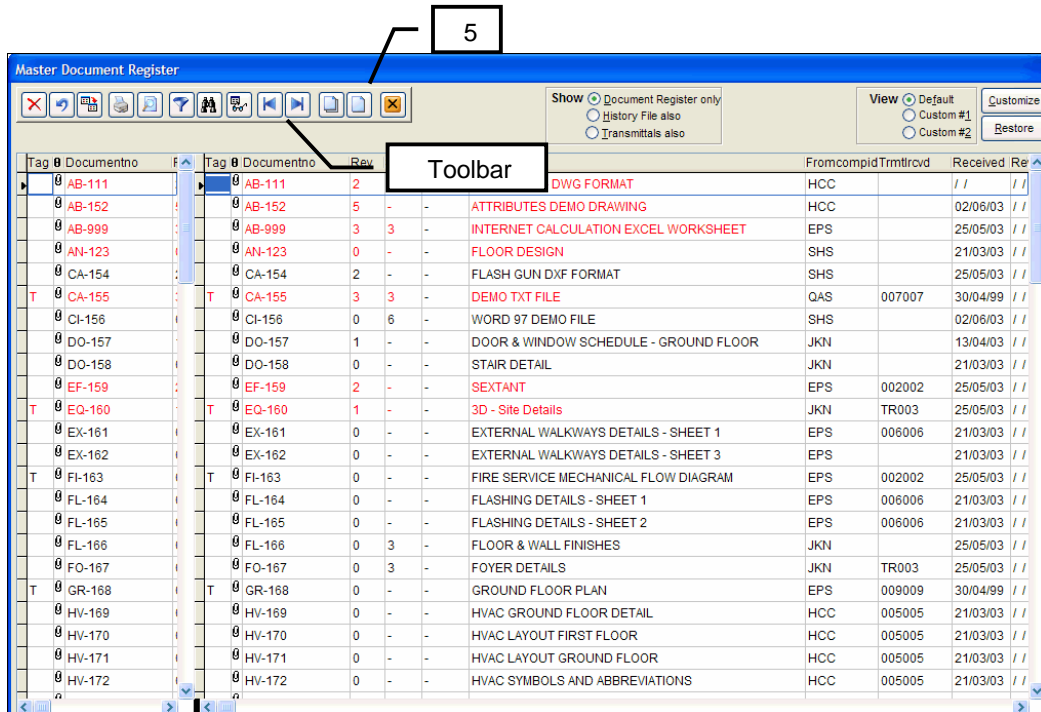
2.03 The Master Document Register

The **Master Document Register (MDR)** is a key file in QDMS. This is where the system stores the latest revisions of all documents. All documents in QDMS (both new and revised) are processed into QDMS through the Master Document Register. Note that the MDR only stores information regarding the latest revision of each document. When Documents are revised, superseded documents are automatically moved to a separate file called the **Document History file**.

4. Select **View** from the main menu and then select **Master Document Register** from the sub menu as follows:














The **Master Document Register** will open in the format of a spreadsheet as shown below:



At the top of the screen is a **Toolbar**. The buttons on this toolbar and meanings of common Function keys are explained below. Most buttons also have associated tool tips when you position your mouse over them.

Button/ Function Key	Purpose
	Close This button is used to close the MDR.
or F4	New Document Used to add a new document to the MDR.

 or F5	New Duplicate Used to add a new document to the MDR, duplicating the information from the current document.
 or Ctrl+End	Move to the bottom of the register.
 or Ctrl+Home	Move to the top of the register.
 or Ctrl+L	Look for Used to locate a specific document containing specific text in any column.
 or F7	Find Find a Document via it's number.
	Filter Used to locate documents that match specified criteria.
	Preview Preview a report.
	Print Print a report.
	Renumber Renumber a document.
	Undo Used to undo the last edit. This option is not available if a user moves to another document first.
	Delete Used to delete the current row.
F8	Enters current date in a Date field.
End	Move to End of Text.
Home	Move to Beginning of Text.

2.04 Adding a New Document

There are a number of ways of registering new documents into QDMS. One of the simplest is to add documents directly in to the Master Document Register. Note that QDMS stores both incoming and outgoing documents in the Master Document Register. The **FromCompld** (From Company ID) field indicates whether a document is internal or from an external party.

To add a new document:



5. Press **F4** or click the **New Document** button to open the Document key information window.
6. In the field **Document No** type **DUMMY-A** and press **Tab**.
7. Click the down arrow next to the **Rev** field and select **1** from the drop-down list.
8. Click the down arrow next to the **Sts** field and select **3** from the drop-down list. The fields in the key information window should now be as shown below:

9. Click **OK** to add this document and return to the Master Document Register.
10. Enter the **Title** for the document as **Dummy Document A** and press **Tab**.
11. Type the **FromCompld** value as **JKN** or select this from the drop down list in the Company field. Press **Tab**.
12. Enter the **Transmittal Received** number as **TR005** and press **Tab**.
13. Enter the **Received** date by pressing **F8** when in the **Received** field and press **Tab**. Note you could also right click on the Received field and select **Today** to enter this date.

To add another document:

14. With your mouse still on the row for document DUMMY -A, press the **F5** key or click the **New Duplicate** button. This is used to create a document with similar attributes to the document just entered. The Document key information box will open again. This time change the A to a B in the Document Number field to create a document DUMMY -B and then click **OK**.
15. Back at the Master Document Register, change the title of Document DUMMY -B by changing the A to a B. (Tip: Press the **End** key to go direct to the end of the Title and then **Backspace**.)

Notice that the other fields such as **FromCompld** and **Transmittal Received** have been “duplicated” from Document DUMMY -A.

16. Add a third document **DUMMY-C** as per steps 14 and 15 above.

Note that there are numerous additional attributes that can be captured about documents in QDMS. These include Disciplines, Types, Zones and the like. You will see some of these additional attributes later in the Guided Tour. You can even add your own fields to the Master Document Register if required.



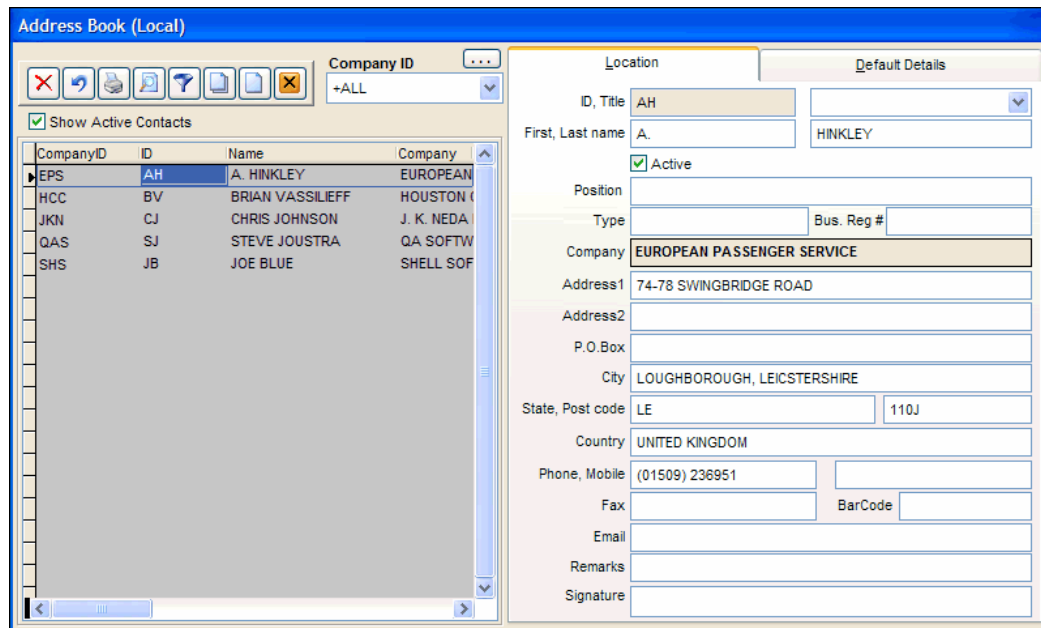
17. Click on the **Close** button on the far right of the Toolbar to return to the **Dashboard**.

2.05 Creating a Recipient

Recipients in QDMS are people to whom drawings are issued. Controlled Documents should be issued under transmittal to both External and Internal recipients. Recipients are stored in an Address Book.

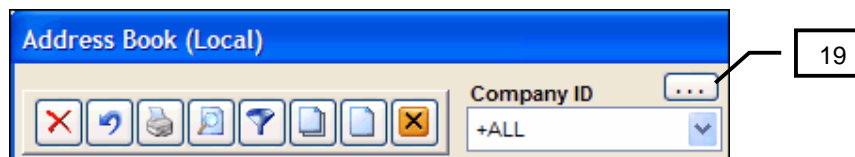
- From the main menu, select **View** and from the sub menu select **Address Book**.

The **Address Book** will then appear as shown below.

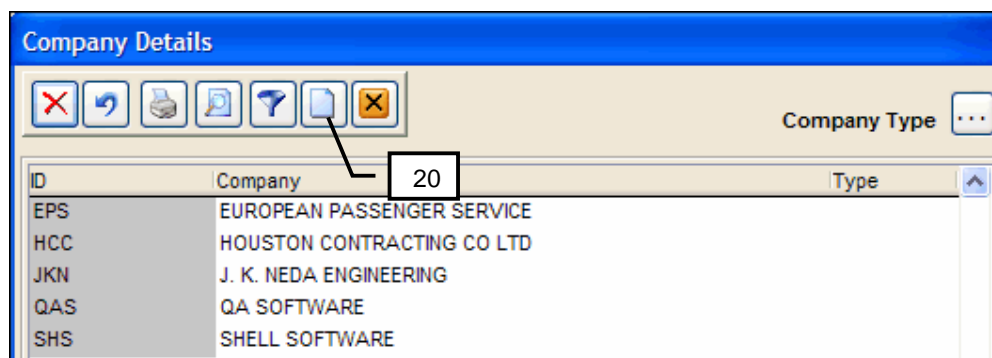


You are now going to enter a new contact Joe Fredericks from BigPond Construction. To do this you must first add **BigPond Construction** as a company.

- Click on the Edit **Company Details** button to the right of the word **CompanyID**, at the top center of the above screen.



The Company Details Screen will then appear.



20. Click the **New CompanyId** button on the toolbar.

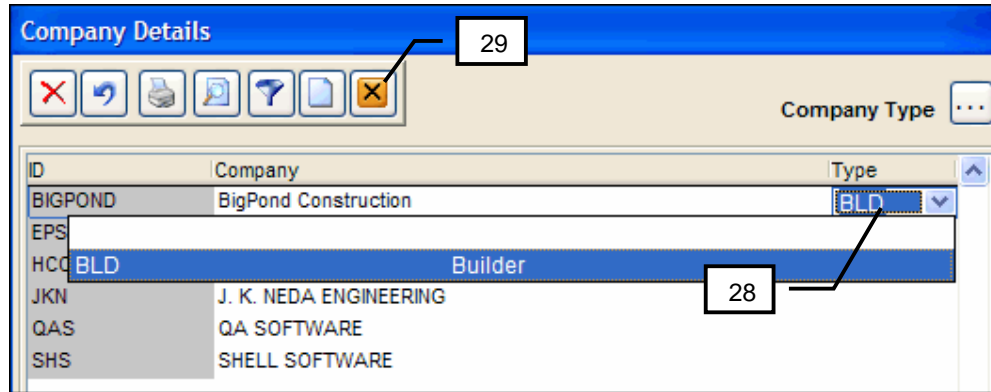
The Add New Company window shown below will appear.

21. Enter the **Company ID** as **BIGPOND** and press **Tab** (This is a unique identifier for the Company).
22. Enter the Title as **BigPond Construction**.
23. Click the **Add** button to return to the Address Book. You will be returned to the Company Details Screen.
24. Select **Company Type** Button located at the right the of Company Details Screen.

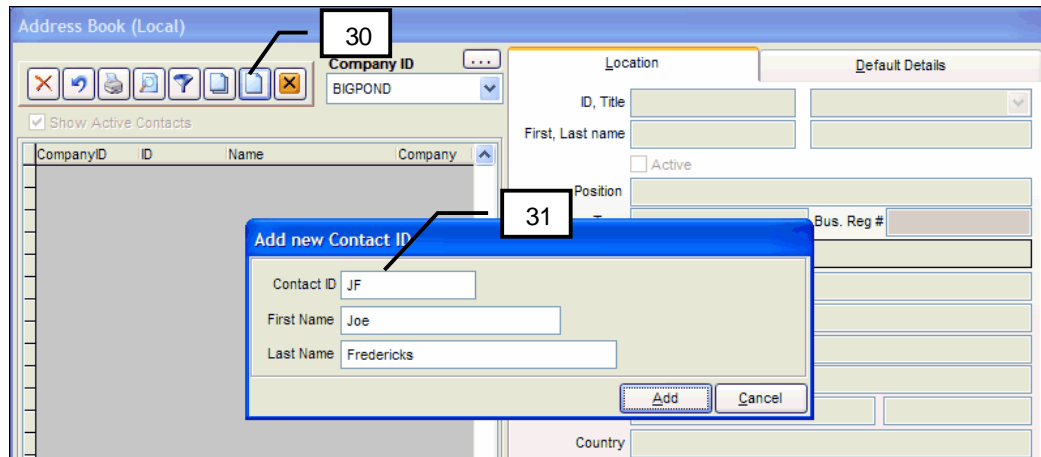
The Company Type Details screen will then be displayed.

25. Click the **New Company Type** button on the toolbar and the following screen will be displayed.

26. Enter the Type as **"BLD"**.
27. Enter the **Title** of the Type as **"Builder"** and click the **Add** button. Now click the **Close** button to return to the Company Details screen.
28. Select **Builder** against BigPond from the drop down under **Type** as in the screen below.

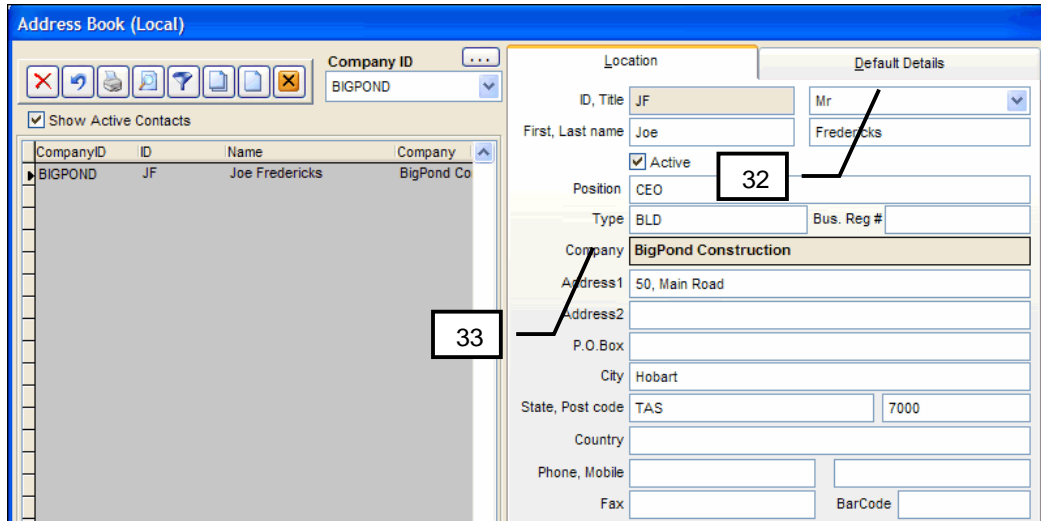


29. **Close** this screen to return to the Address Book screen. BIGPOND will be selected as the current Company ID by default. (If not, just select BIGPOND from the Company ID drop down list).
30. Click on the **Create a new Contact** button on the Address Book Toolbar. The Add new Contact ID window shown below will appear.

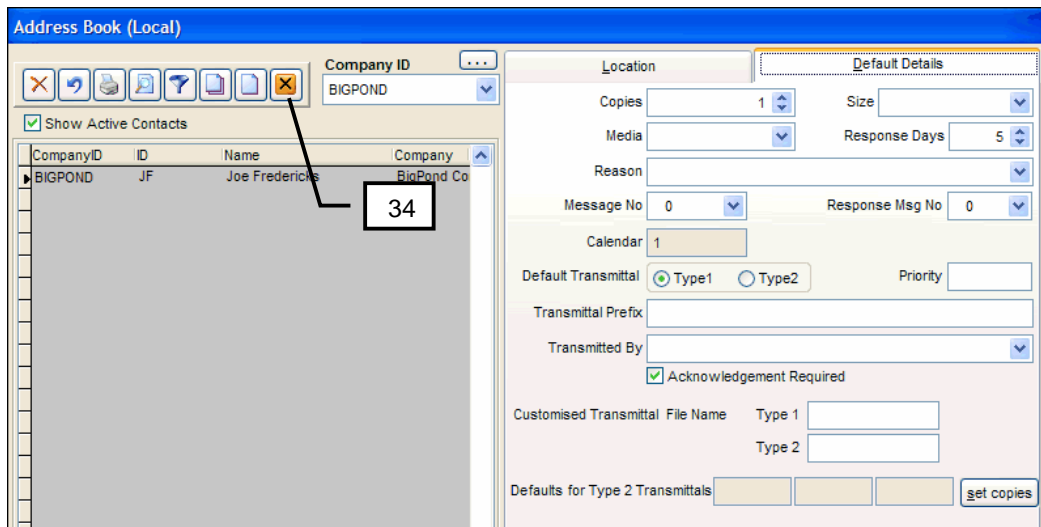


31. Enter the contact details as shown above and select the **Add** button.
32. Click the **Title** drop down arrow on the top right of the screen and select Mr.
33. Enter the rest of the details for this contact as shown below. Press **Tab** to move between fields.

Position	CEO
Address1	50, MAIN ROAD
City	Hobart
State, Post code	TAS 7000



Note that the right hand side of the above screen is in fact two pages (see the Location and Default Details Tabs at the top right of the screen). The second page is the **Default Details** page and can be used to store a number of default values for each recipient. The screen below shows a completed Default Details page. The meaning of each field is outside the scope of this Guided Tour but they are generally self explanatory.



34. Click the **Close** button on the Toolbar to close this screen.

2.06 Generating a Transmittal

A transmittal is a means of creating and recording the issue of controlled documents to recipients. Transmittals can be generated in a number of ways. The simplest transmittal generation method is to send one or more documents to a single recipient. Note that regardless of the transmittal method used, all transmittals in QDMS are processed in the same way.

35. From the main menu select **Transmit** and from the sub menu select **Single Recipient**.

The Transmittal generation screen then appears as shown below:

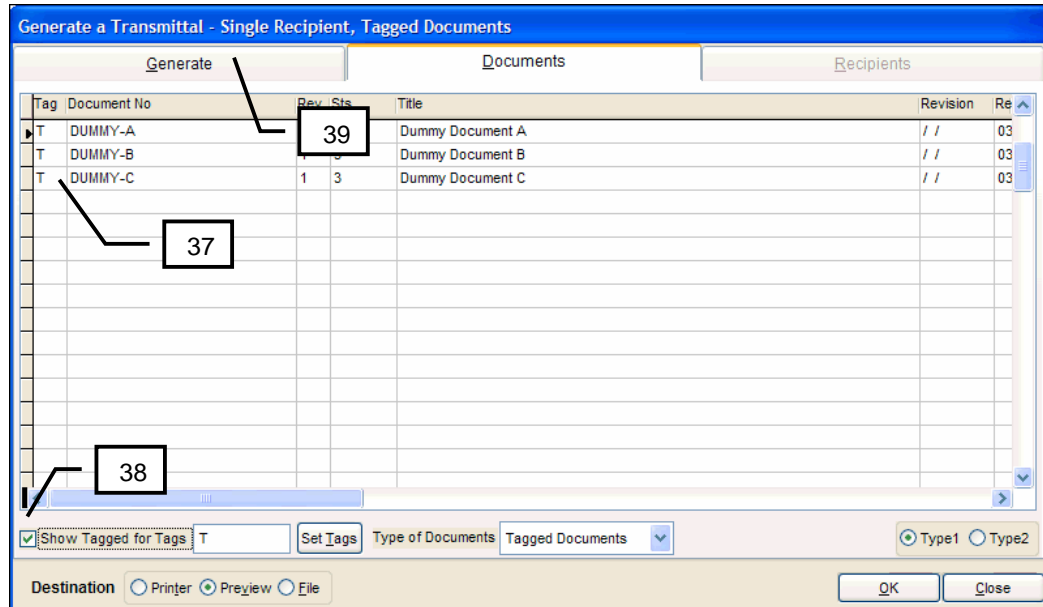
The Transmittal screen has three pages (tabs) which are selected via the Tabs at the top of the screen. The first page is the **Generate** page where general information about the transmittal is defined such as the Recipient to whom the documents are to be sent and the reason for issue.

The second page is the **Documents** page, where the document selection is done. There are a number of ways of selecting documents for transmittal under "Type of Documents" located at the bottom of the Documents Tab.

The third page is the **Recipients** page which is for selecting recipients when the transmittal is to **multiple recipients**. This will be covered in the Advanced Tour.

36. Select the Documents page from the top of the form by clicking on the **Documents** Tab.
37. Locate the documents DUMMY -A, DUMMY-B AND DUMMY-C and type the letter **T** in the Tag column (extreme left column of the grid) against each of these documents.
38. Now click on the **Show Tagged for Tags** Tick box in the bottom left corner of the above screen.

Only documents tagged with the letter T will be displayed (scroll to the top of the list if necessary). You may notice there are documents tagged other than just DUMMY -A to DUMMY-C. To remove these documents from the list of tagged documents, delete the letter T in the Tag column against them. Then click the **Show Tagged** tick box twice (off and on again) and you will see just the three documents you need to transmit. (Alternatively select Clear from the Set Tag button to remove all Tags prior to Tagging).



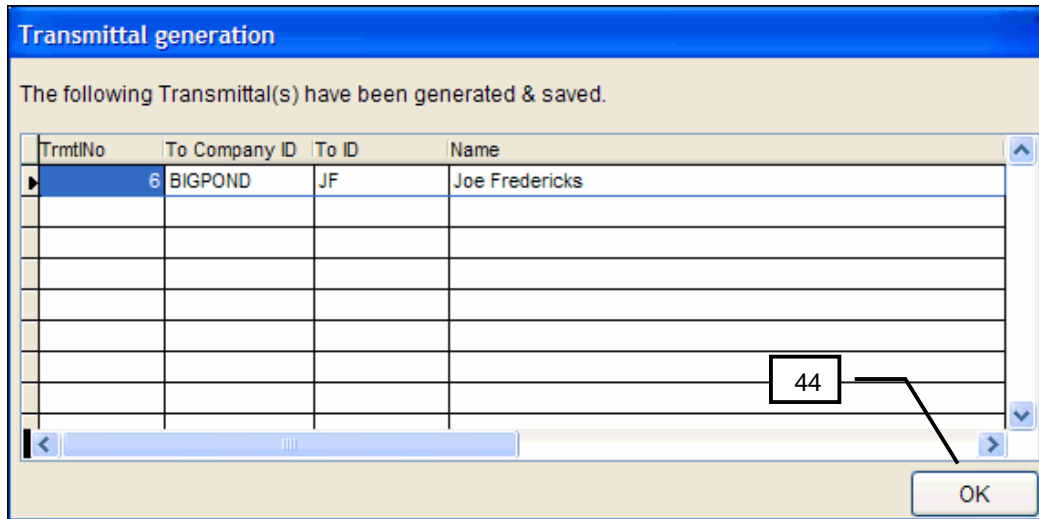
39. With your documents selected, you can now go back to the **Generate** Page (click on this tab at the top of the screen).
40. Select the **Recipient** for this transmittal as **BIGPOND** from the Recipient drop down list at the top right of the Generate page if not already selected by default.

The other fields on the Generate page have the following functions

Field	Description
Transmittal No	This is an automatically generated sequential number for each transmittal.
Reference No.	This field can store a user defined or automatically generated alternate reference number.
Transmitted by	This is the Method of delivery of the transmittal.
Acknowledgement Required	If the recipient is required to sign and return the transmittal to acknowledge receipt, tick this box.
Re-send Revisions	If you want to ensure that future revisions of the documents being transmitted are also sent to the recipient, leave this box ticked. QDMS will then prompt via transmittals pending to re-send future revisions automatically.
Copies, Size, Media	These fields specify the number of copies, the size of documents and the media being sent. Note that these attributes can be defined per document using a Type 2 transmittal.
Reason	This is the reason why the documents are being issued.
Message	This is a message printed on the transmittal.
Response required	If the recipient is required to respond to the transmittal (eg approve the documents) you can select a response message and enter a response required by date. QDMS will then track outstanding and overdue responses.
From	This is the person the transmittal is from. Note that to set up the default transmittal sender you will need to add that person and his/her company into the Address book. You can then make this person as the default sender via Tools\Options\Program Defaults.

Note that values in the various drop down lists for Reasons, messages etc are user definable via the **View** menu and sub menu **Configuration Tables**. More on this later in the Advanced Guided Tour.

41. Click on the **OK** button to generate the transmittal.
42. A preview of the transmittal will be displayed (assuming the destination was set to Preview which is the default). Click on the **Print** button on the Print Preview toolbar to send the transmittal to the printer.
43. You will then be prompted to save the transmittal. Click **OK** at the **Save Transmittal** form.
44. The following screen will then appear showing that the Transmittal generated has been saved. Click the OK button and you will be returned to the transmittal generation form.

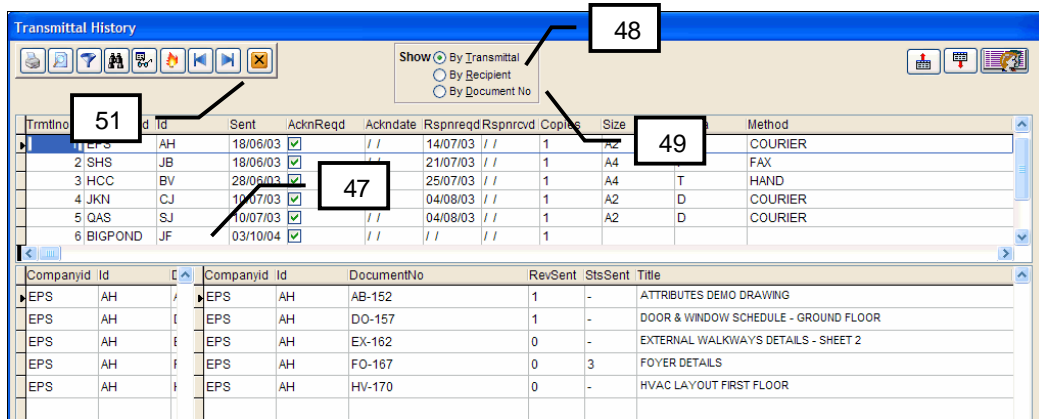


45. Note that the Transmittal number at the generate screen has auto incremented to 7. From the Transmittal Generation Screen select **Close** button and again select the **Close** button to return to the Dashboard.

2.07 View the Transmittal History

Transmittal information in QDMS is stored in the Transmittal History file. It is instructive to now view the transmittal you have just generated to see how it is stored in QDMS.

46. From the **View** menu, select **Transmittal History**.



Notice that the upper half of the screen displays by default a register of all transmittals.

47. Click on the row for Transmittal Number 6.

In the lower half of the screen you will see the documents transmitted on transmittal number 6.

There are three views for the above screen. The most useful view at any time is dependant on your reason for being in this screen.

48. Try changing the view to **By Recipient** (using the radio buttons at the top center of the screen).

You will now see the Address book in the upper grid and in the lower grid the documents that have been transmitted to each Recipient.

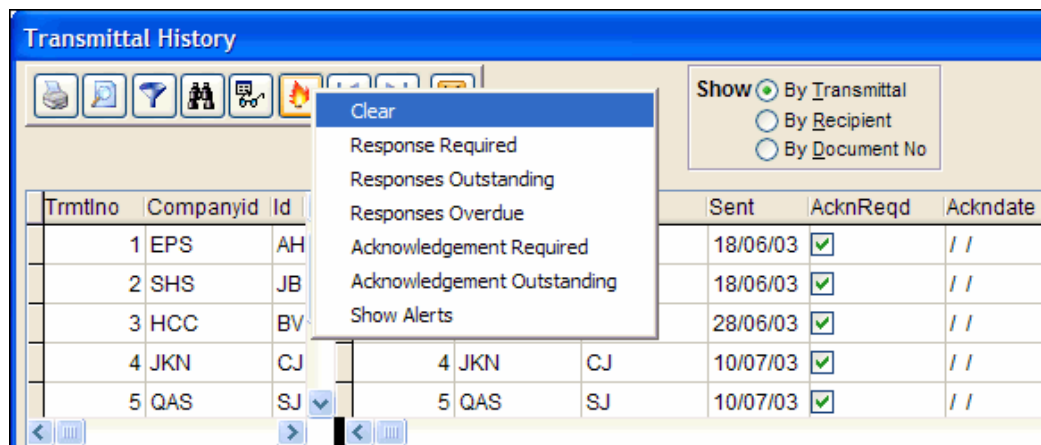
49. Change the view to **By Document No** and in the top grid the Master Document Register is displayed.

50. Locate document DUMMY -A to see who it has been issued to.

51. Close this screen and return to the Dashboard using the **Close** button on the toolbar.

Note it is possible to regenerate a transmittal in it's printed format from the above screen by simply double clicking on a transmittal number (the View must be By Transmittal) and selecting Preview from the two options that appear.

Note also that the **Hot List** button at the above screen enables the view to be immediately filtered for transmitted documents to which responses are outstanding and perhaps overdue or due in the next few days.



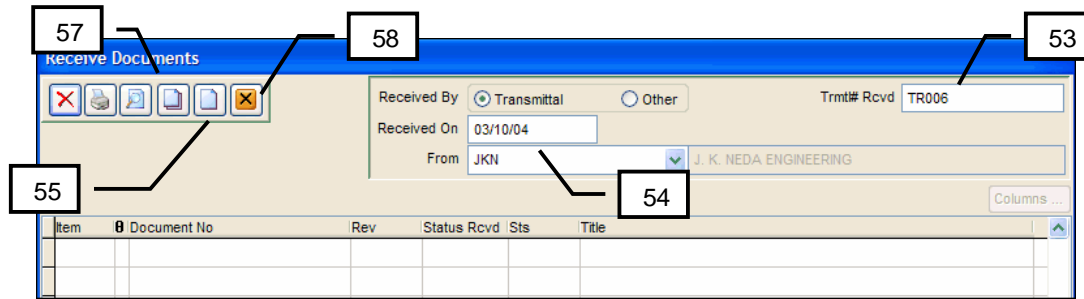
2.08 Receiving Revised Documents

You will now register revised versions of Documents DUMMY -A and B into QDMS to see how the system manages revisions to documents. While the document register can be updated directly with the new revision, the most popular method for recording the receipt of documents is the **Receive Documents** screen which you will now use.

52. From the main menu, select **Receive** and then sub menu **Documents**.

53. Enter the **Trmtl#Rcvd** (Transmittal Received) number as **TR006** and press **Tab** twice.

54. Select the **From** value as **JKN** from the drop down list.



Note that steps 53 and 54 above setup the general information that will be recorded against each of the documents you are about to enter.

55. Press **F4** to add a new document. At the Key Information window, type DUMMY -A and press **Tab**. You will get a message that the document exists in the MDR – click **OK** to continue and the Rev field will be populated with the current revision value for this document which is 1. Change the revision to 2.
56. Click **OK** and see how the document is added to the grid with the existing title from the Master Document Register.
57. Press **F5** to add a duplicate document (this will save typing DUMMY -B) and change the A to a B at the document key information window for Document DUMMY -B. Press **Tab**, click **OK** and change the **Rev** to **2** and click **OK**.
58. Click on the **Close** button. Click **Yes** when prompted to save your work and click **No** when prompted to enter another transmittal received.

2.09 The Document History File

QDMS maintains automatically a complete history of every revision of every document in a **Document History** file. Now that you have processed revisions to documents DUMMY -A and DUMMY-B it is time to have a look at this file.

59. From the **View** menu, select **Document History File (All revs)**.
60. Locate Documents DUMMY -A and DUMMY-B and notice that there are two entries each for these documents. Notice also that information in the document history file cannot be changed which means the document history can be audited from here.
61. Click on the **Close** button on the tool bar.

2.10 Transmittals Pending

When new revisions of documents already stored in QDMS are received, the following files in QDMS are updated:

- The **Master Document Register** gets updated with the latest revision.
- The **Document History File** is updated with all revisions.
- The **Pending Transmittals** file is updated if the document being received has previously been transmitted. Transmittals Pending displays only recipients who do not have the latest revision of documents they have previously received.

62. From the **View** menu, select **Pending Transmittals**.

Companyid	Company	Id	Title	First Name	Last Name	Address1	Address2
BIGPOND	BigPond Construction	JF	Mr	Joe	Fredericks	50, Main Road	
EPS	EUROPEAN PASSENGER SERVICE	AH	Mr.	A.	HINKLEY	74-78 SWINGBRIDGE	
JKN	J. K. NEDA ENGINEERING	CJ	Mr.	CHRIS	JOHNSON	LISBON ROAD	
QAS	QA SOFTWARE	SJ	Mr.	STEVE	JOUSTRA	3/13 Acacia Street (P BYRON BAY	

Companyid	Companyid	Id	Documentno	RevSent	RevNow	StsSent	StsNow	TrmtNo	Sent	Title
BIGPOND	BIGPOND	JF	DUMMY-A	1	2	3	3	6	03/10/04	Dummy Document A
BIGPOND	BIGPOND	JF	DUMMY-B	1	2	3	3	6	03/10/04	Dummy Document B

Notice that the recipient BIGPOND is one of the recipients displayed. This is because they currently have superseded copies of documents. Notice documents that are pending to be issued to BIGPOND are only DUMMY -A and DUMMY-B. This is because the document DUMMY-C which was transmitted to them previously, has not been updated with a later revision.

It is a good idea to print transmittals pending for checking after receipt of a batch of revised documents. Simply click the Print or Print Preview button on the Toolbar.

63. Click on the **Close** button on the tool bar to close this screen.

2.11 Transmitting Revised Documents

The Pending Transmittals file is always updated as documents are transmitted and revised and can be cleared in only one of two ways:

- Send the recipient the latest version of documents by transmittal.
- Take the recipient off the distribution for the documents.

One of the unique features of QDMS is that the distribution of documents is built automatically simply via the process of transmitting documents. This means there is no need to set up a matrix for distribution prior to issuing documents which is a great time saver. However, there are times when you no longer want to keep sending the latest revision of documents to recipients. In this case you can edit the distribution via the Recipient document register (available under the view menu). This is option (b) above and is not covered by the Guided Tour.

You will now clear Pending Transmittals by sending BIG POND the documents pending for them. QDMS provides a special transmittal option for revised documents in which the system will select the required documents for each recipient to bring them up to the latest revision.

- From the **Transmit** menu, select **Revised Documents**.
- At the **Generate** page select BIGPOND as the recipient (Note that only recipients with superseded documents are available for selection)
- Click on the **Documents** page and notice that the documents from **Pending transmittals** have been selected automatically for you. (ie Dummy -A and B)
- Click **OK** to generate the transmittal.
- Click **Print** at the Preview Screen and click **OK** to save the transmittal when prompted. A confirmation window then appears. Click OK here too.

69. Click **Close** and **Close** again when prompted.
70. Finally, from the **View** menu, select **Pending Transmittals** and notice that BIGPOND is no longer listed. Click **Close** from the Toolbar.

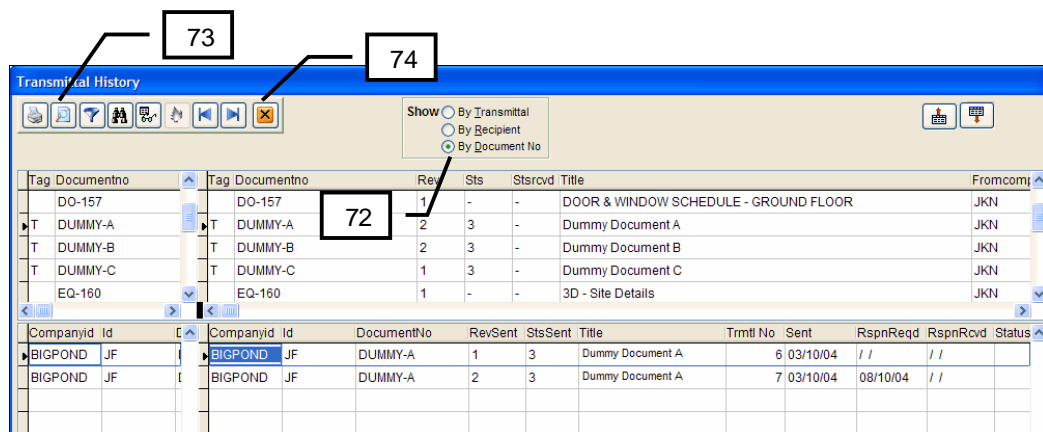
Note that Pending Transmittals gets updated regardless of the transmittal method used. If rather than using the Revised Documents Transmittal option you had simply tagged these two documents and transmittal them to BigPond using a simple transmittal, the effect on Pending Transmittals would have been the same.

All transmittals in QDMS are processed by the system in the same way and the different transmittal types are provided purely for convenience.

2.12 View Transmittal History again

With some more transmittal information, have another look at your transmittal history.

71. From the **View** menu, select **Transmittals History**.
72. Change the view to **Document No** at the top of the screen and locate Dummy Document.



73. Click on the row containing Document DUMMY -A.
Notice that DUMMY -A has been issued twice to BIGPOND.
74. You might also try clicking Print Preview with each of the different views displayed to get an idea of some of the reports available in QDMS.
75. Click the **Close** button.

2.13 Exiting QDMS

To quit QDMS:

76. From the **File** menu, select **Exit** and click **Yes** when prompted.

You are now ready for the **Advanced Guided Tour** in Chapter 3. This will take you through an extended range of QDMS features and is essential reading if you want to get a feel for the power of QDMS.

Chapter 3 – QDMS Advanced Guided Tour

- 3.01 Introduction
- 3.02 Managing Configuration Tables
- 3.03 Using Filters
- 3.04 Customising the Master Document Register
- 3.05 Printing the Master Document Register
- 3.06 Master Document Register Views
- 3.07 Receiving Documents
- 3.08 Using Re-Transmit
- 3.09 Using Auto Tag
- 3.10 Transmit to Multiple Recipients
- 3.11 Using a Free Form Transmittal
- 3.12 Viewing the Transmittal History
- 3.13 Tracking Responses and Acknowledgements
- 3.14 Other things to try

3.01 Introduction

The Advanced Guided Tour of QDMS introduces a number of further concepts and features of QDMS not covered in the Simple Guided Tour. If you are not already in QDMS, run the program and log into the Demonstration Project. If you already have QDMS running, make sure you are back at the Dashboard. In the section below, all actions start from the Dashboard.

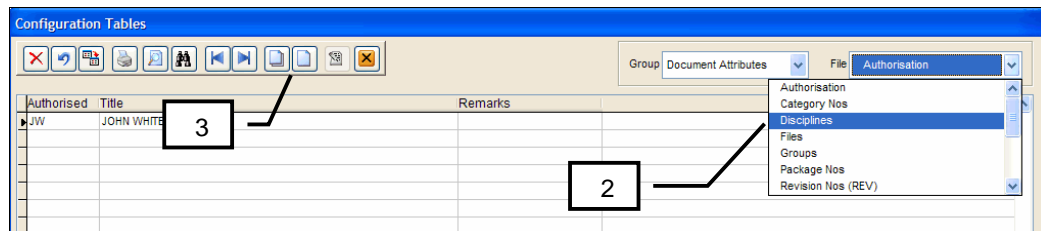
3.02 Managing Configuration Tables

In the Simple Guided Tour you were introduced to the major files in QDMS such as the Master Document Register, the Document History File and the Transmittals History. In many of the screens in QDMS there are drop down lists from which you can select values. The Master Document Register and Transmittal generation screens in particular have many of these drop down lists.

The values in the drop down lists are maintained in what are called **Configuration Tables** in QDMS. Generally, wherever you see a drop down list in QDMS you can assume there is a Configuration Table associated with it where you can maintain your own values for that list.

In this first activity in the Advance Guided Tour you will add a new Discipline value to the table that stores the library of Disciplines and also, add a new Message to the table that stores standard messages for use on Transmittals.

1. From the **View** menu, select the sub menu **Configuration Tables**.



The **Group** drop down lists has three options and controls the files listed in the Files drop down list. The three groups are:

- Document Attributes
- Transmittal Attributes
- Address Book Attributes

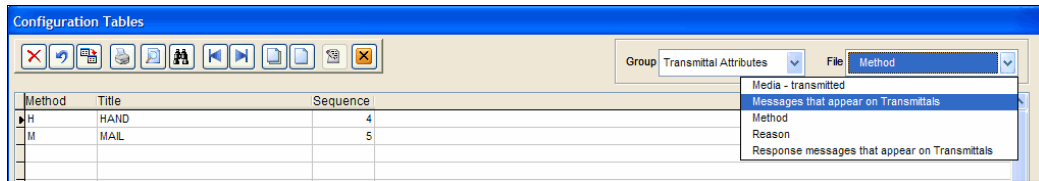
The **File** drop down list shown above lists all the Configuration Tables in the selected Group available in QDMS. Use the scroll bar to see additional files. Once a file is selected the main grid displays the values stored in this file and actions on the data are performed using the toolbar as normal.

2. From the **Files** drop down list, select **Disciplines** as shown above.
3. Click on the **New** button and when prompted, enter the **Discipline** code as **6** and the **Title** for the Discipline as **FITOUT**.
4. Click **OK**.

Note that codes can be alpha-numeric. Eg your code for FITOUT could be FIT.

Notice that you could print a list of discipline values by clicking the Print or Print Preview button on the tool bar.

- Change the selected **Group** to **Transmittal Attributes** and in the **File** drop down list select **Messages that appear on Transmittals** .



- Click on the **New** button and when prompted, enter the sequence number as 5 and type the message **"This is a test message"** .
- Click **OK**.

At this point you may like to view the contents of some of the other Configuration Tables. Some commonly used ones are:

Transmittal Attributes

- Reasons:** To store standard reasons for sending documents to recipients such as *For Information*.
- Methods:** To store the methods by which documents are transmitted such as *By Courier*.

Document Attributes

- Types:** To store Document Types such as *Drawings, Specifications, Procedures*.
- Status:** To store the library of Status codes.

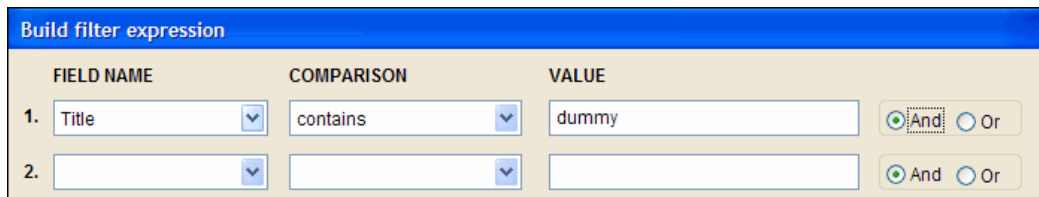
- Click the **Close** button on the tool bar.

3.03 Using Filters

Filters are a very powerful tool in QDMS and as the amount of information you have stored in QDMS grows, filters become an essential tool to select information for reporting and viewing. Filters are in essence a method of selecting information that meets specified criteria.

Filters are available throughout QDMS and always work in the same way. You will use the Master Document Register in this tour to see how the filters work.

- From the **View** menu, select the sub-menu **Master Document Register** .
- Click the **Filter** button on the Toolbar to be presented with the standard Filter Expression Builder screen.



The above screen shows the filter expression *Title contains dummy*. Looking at the component parts of this expression, **Title** is a field name in the Master Document Register. All fields in the master document register are available for use in the filter expression since this filter was activated from within the Master Document Register.

When the filter is activated in other files in QDMS, the fields available for use relate to the file currently in use.

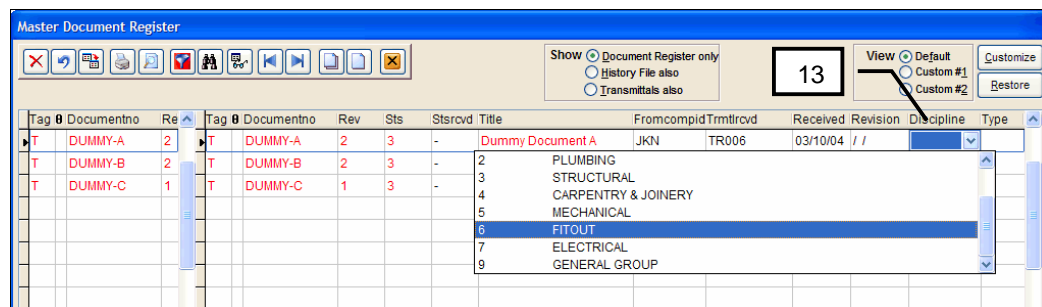
By selecting the **Field Name** value as **Title**, you are indicating that you want to filter for documents that have a certain value in the **Title** field in the document register. The **Value** field above is **dummy**. This means that the value you are filtering for in the title field is *dummy*. The **Comparison** field above is set as **contains** which means that the title field must **contain** the word *dummy*. Note that a common mistake in QDMS is to use the incorrect comparison condition. For example, the filter *Title equal to dummy* has a very different meaning to *title contains dummy*. In the former case, only documents that have the word *dummy* as the document title will be selected. In these documents will have no other text in the title other than the word dummy. In the latter case, the title only has to *contain* the word *dummy* and can contain other words and still meet the filter condition.

Notice at the filter generation screen above that the filter can contain up to five lines of conditions. Multiple lines are joined together by either an **And** or **Or** condition. Notice also that commonly used filters can be saved for simple recall later using the Save and Load buttons.

11. At the expression builder screen, select **Title** from the drop down list under **Field Name** and press **Tab**. Select **contains** from the drop down list under **Comparison** (you can scroll down to locate the contains comparison or just type **c** to locate it) and press **Tab**. Then type **dummy** in the **Value** box.
12. Click **OK** to activate the filter.

The documents you can see in the Master Document register should now be restricted to those shown below.

13. Try using the **Tab** key to move across to the Discipline column on the Master Document Register. A drop down list for Discipline values will appear and if you click on the list you will see that your Discipline 6 – FITOUT is in the list.



The screenshot shows the 'Master Document Register' window. The table displays the following data:

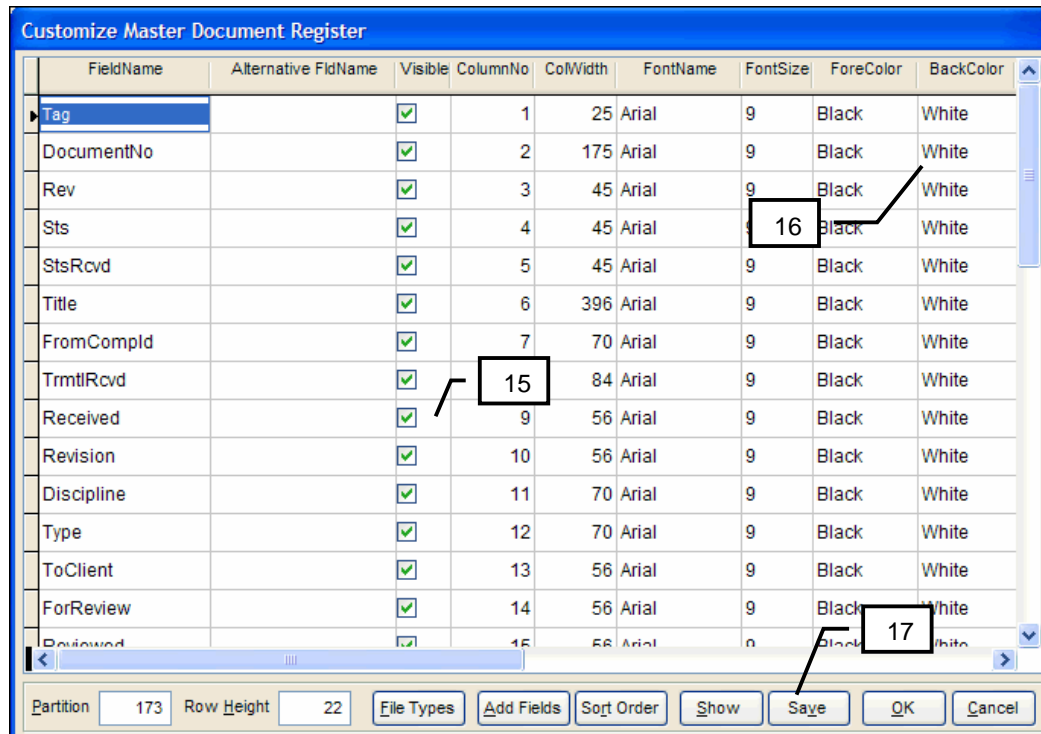
Tag	Documentno	Re	Tag	Documentno	Rev	Sts	Stsrcvd	Title	Fromcompid	Trmtircvd	Received	Revision	Discipline	Type
T	DUMMY-A	2	T	DUMMY-A	2	3	-	Dummy Document A	JKN	TR006	03/10/04	/ /		
T	DUMMY-B	2	T	DUMMY-B	2	3	-	2					PLUMBING	
								3					STRUCTURAL	
								4					CARPENTRY & JOINERY	
								5					MECHANICAL	
								6					FITOUT	
								7					ELECTRICAL	
								9					GENERAL GROUP	

A dropdown menu is open for the Discipline column, showing the following options: PLUMBING, STRUCTURAL, CARPENTRY & JOINERY, MECHANICAL, FITOUT (highlighted), ELECTRICAL, and GENERAL GROUP.

3.04 Customising the Master Document Register

There are a large number of fields available for use in the Master Document Register. It is unlikely you will need to use all the possible fields when setting up projects in QDMS. As a result, you will find that when maintaining your data you are constantly tabbing across columns you don't use which is inefficient. This can be overcome by customising the layout of the Master Document Register to suit your individual needs.

14. With the document register open, click on the **Customize** button at the top right corner of the screen.



The Customise window above enables rearrangement of columns, making selected fields invisible and changing other attributes of columns such as font size. To demonstrate some of the possibilities:

15. Locate the field **Received** (currently Column No. 9) and change the **Column No.** value to 2.
16. Locate the field **DocumentNo** and change the “BackColor” to Yellow. (A drop down list will appear when you click in the field).
17. Click Save and then **OK** and notice the change to the document register layout.

This saved customisation is only for the current user. Other users may save their own custom views i.e. the custom views are not global, but are user specific.

Note also that columns can be re -arranged by simply dragging the column headers to the left or right. Again, to save an arrangement, click customise and then save. Besides the “Default View” there are two additional custom views that can be stored at any time.

3.05 Printing the Master Document Register

While still in the Master Document Register, it is time to see how simple it is to generate reports in QDMS. The print and print preview buttons on the tool bar generate WYSIWIG (what you see is what you get) reports based on the current display.

18. Assuming your filter is still active (the filter button is red when a filter is active), trying clicking print preview to generate a Master Document Register Report for Documents with Dummy in the title.

Master Document Register											CAS Software			
DEMONSTRATION PROJECT OF QDMS											Report No : Grid Report		Page : 1	
FILTER : TITLE contains dummy, ignoring case											Run Date : Sunday, 03 October 04 Time : 12:47:44			
Tag #	Documentno	Rev	Sts	Stsrcvd	Title	Fromcompid	Trmtircvd	Received	Revision	Discipline	Type	Tocient	Forme	
T	DUMMY-A	2	3	-	Dummy Document A	JKN	TR006	03/10/04	//	6		//	//	
T	DUMMY-B	2	3	-	Dummy Document B	JKN	TR006	03/10/04	//			//	//	
T	DUMMY-C	1	3	-	Dummy Document C	JKN	TR005	03/10/04	//			//	//	

19. Click the **Close Preview** button on the Print Preview tool bar to return to the Master Document register and try the following:
 - (a) Rearrange a column (eg drag the **Sts** column to the left of the **Rev** column) and click print preview again. Notice that the order of columns of the report has changed accordingly.
 - (b) Change the width of the Title column by clicking and dragging the right boundary of the column heading to the left. Again print preview and notice the difference.
 - (c) Click on the DocumentNo column heading and the order in which the documents are currently displayed will be reversed. Again print preview to see the difference.

Note that the last item (c) above is an important concept in QDMS. The way data is sorted can be quite important and changing the sort order is as simple as clicking on the column header of the field to sort by. Clicking again sorts in reverse order.

3.06 Master Document Register Views

While the Master Document Register in QDMS stores only the latest revision of each document, it is possible from within the Master Document Register to view a revision history of documents and even the transmittal history if required.

20. Before proceeding further, click on the **Filter** button again on the Toolbar in the Master Document Register and at the **Build Filter Expression** screen click the **Clear** button and then **OK** to deactivate the current filter.
21. At the top of the Master Document Register screen, click on the **History File also** radio button under **Show** to load the Document History file.
22. In the upper grid which is still the Master Document Register, locate and click on the document DUMMY-A and notice the revision history below:

Tag	Documentno	Rev	Sts	Strcvd	Title	Fromcompid	Trmtlrsvd	Received	Revision	Discipline
T	DUMMY-A	2	3	-	Dummy Document A	JKN	TR006	03/10/04	//	6
T	DUMMY-A	1	3	-	Dummy Document A	JKN	TR005	03/10/04	//	

Notice that DUMMY-A has two entries in the Document History file. Note that a change in Status and/or a change in Rev triggers an automatic update of the document history.

23. Now click on the **Transmittals also** radio button at the top of the Master Document Register screen to load the transmittal history file.

Latest	Companyid	Id	Documentno	Rev	Sts	Upd/Title	Trmtlno	Sent	Strcvd	Rspnrqcd	Rspnrsvd	Copyid
<input type="checkbox"/>	BIGPOND	JF	DUMMY-A	1	3	Dummy Document A	6	03/10/04	-	//	//	1
<input checked="" type="checkbox"/>	BIGPOND	JF	DUMMY-A	2	3	Dummy Document A	7	03/10/04	-	08/10/04	//	1

Notice that document DUMMY-A has been transmitted twice to BIGPOND, once at Rev 1 and once at Rev 2. Scroll to the right in the lower grid to see the transmittal details.

3.07 Receiving Documents

In the next few sections of the Guided Tour you will explore some of the alternative transmittal methods supported by QDMS. First though, you will receive some more documents using the **Receive Documents** screen.

24. If you have not already done so, close the Master Document Register using the **Close** button on the Toolbar.
25. From the **Receive** menu, select **Documents**.
26. At the receive documents screen, enter the transmittal received number as **TR008**.
27. Select the **From** value as **JKN**.
28. Press **F4** to add a new document.
29. Enter the Document Number as DUMMY -A, and press **Tab**. A message will appear that the document exists in the MDR and click OK.
30. Press **Tab**, and change the Revision value from 2 to 3 and click OK.

Item	Document No	Rev	Status Rcvd	Sts	Title	Filename	Cadpath	Discipline	Zone
1	DUMMY-A	3	-	3	Dummy Document A			6	A1

31. At the top right of the screen, click the **Columns** button. Now in the columns window, scroll down to find the column **Discipline** and against this column, tick the box in the Visible column.
 32. Scroll down further to find the **Zone** column and again tick the box in the Visible column. Now click the **Save** button and the Discipline and Zone columns will appear in the Grid as shown above (you may have to scroll to the right to see the columns you have added) . Select values for the Zone and Discipline using the drop down lists.
- Note:** If you want to select a document file (view file) to relate to the document you have just registered, right click in the Filename field to the right of the Title of the Document and choose **Select File** from the options. You will be taken to an open file dialog box, defaulting to \Qasoft\QDMS\CAD folder. Select file QDMS1.Pdf and click OK.
33. Now press F5 to add a further document and enter the details for DUMMY -B. Change the Rev to 3 and click OK.
 34. Repeat step 33 for DUMMY-C which is an existing document (change the Rev to 2)
 35. Enter document DUMMY -D which is a new document (make the Rev 1 and the Title as Dummy Document D.
 36. Click on the **Close** button and click **Yes** when prompted to save the information you have entered into the Master Document Register and **No** when prompted to enter another transmittal received.

3.08 Using Re-Transmit

The most commonly used method of transmitting documents in QDMS is the Single recipient option to transmit a series of documents to a recipient. The documents on the Single Recipient transmittal option are selected by **tagging** them from the Master Document Register. The **Re-Transmit Transmittal Received** option is very similar to the Single Recipient option, only the documents are selected automatically based on the selection of an incoming transmittal number.

In section 3.07 above, you processed a group of incoming documents against a transmittal received number of TR008. Using re-transmit you will now transmit these same documents to a recipient. QDMS will select the drawings for you.

37. From the **Transmit** menu, select **Re-Transmit Transmittal Received**.
38. The first window that appears is for the selection of the incoming transmittal number. Either Type TR008 in the Transmittal No. field or click on it on the lower grid to select it.

TrmtlNo	VndCompl	Packageld	Dated	Received	AckRqd	AckDate	Message	RspMsg
TR008	JKN		03/10/04	03/10/04		/ /	memo	
TR006	JKN		03/10/04	03/10/04		/ /	memo	
TR001	EPS		02/06/03	02/06/03		/ /	memo	
TR003	JKN		25/05/03	25/05/03		/ /	memo	
TR004	QAS		13/04/03	13/04/03	F	/ /	memo	
TR002	HCC		21/03/03	21/03/03		/ /	memo	

39. Click **OK** to proceed to the transmittal generation screen, and click on the **Documents** page (the tab at the top of the screen) to see the list of drawings selected.
- Notice that the four drawings you input at 3.07 above have been selected automatically.
40. Now click back on the **Generate** page and complete the fields on this screen as shown below. Select HOUSTON CONTRACTING (HCC) as the recipient.

By using the drop down list for Messages you will notice that the message you added to the Miscellaneous files in section 3.02 above is now available for selection.

41. Click on **OK** to generate the Transmittal and **Print** after reviewing the preview. **Save** the transmittal when prompted and **close** the transmittal generation screen when finished.

3.09 Using Auto Tag

In the Guided Tours so far you have seen two ways of selecting documents for transmittal: Tagging and Re-Transmit. A third method of selecting documents is **Auto Tag**. This is a powerful feature of QDMS and can be used to automatically select documents for transmittal based on one of three options:

Via a filter condition : For example to select all documents that have the word *steel* in the title.

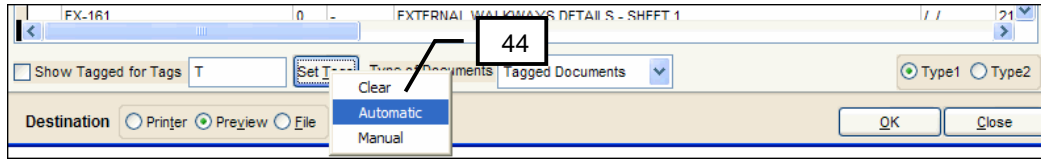
Based on a previous transmittal : For example, if last week you sent 35 documents to a person and this week want to send the same 35 documents to someone else.

Based on the distribution : For example, you want to send all the documents you have sent in the past to Recipient A to a new Recipient B.

There are even more things that you can do with Auto Tag such as work out which documents in the Master Document Register a company has NOT received but that is for later.

You will now use Auto tag to automatically tag the documents in the Master Document Register that have the word **steel** in their title, to select them for transmittal.

42. From the **Transmit** menu, select **Multiple Recipients**.
43. At the transmittal generation screen, click on the **Documents** page.
44. At the bottom left of the Documents page, click on the **Set tags** button and select **Automatic**.

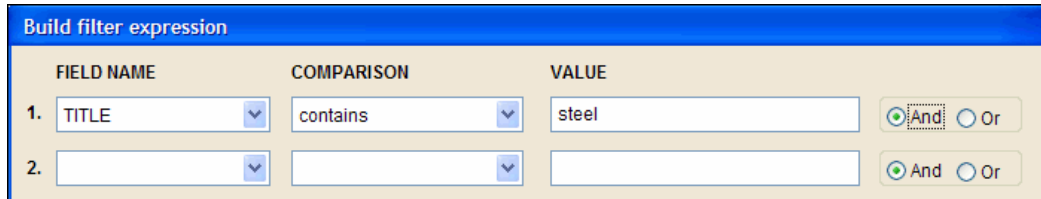


Note that Auto Tag can be used with all transmittal methods and the use of Multiple Recipients as the transmittal here is just in readiness for later.

The Automatically Tag Documents screen will now appear. Notice the options available as per the introduction to this section.

Note: It is always a good idea to click on the **Clear all Tags first** tick box at the bottom left of the Automatic Tags window (selected by default) to ensure that any existing tags in the Master document are removed during the Auto Tag process. Remember always in QDMS that tags are only a **temporary** means of selecting documents for transmittal.

- Now click on the radio button **That meet a filter condition** . The **Build Filter Expression** window will appear.



- Set up the filter condition **Title contains Steel** as shown above.
- Click **OK** to activate the filter and then back at the Auto matically tag window, click **OK** to perform the Auto tag process.
- Back at the transmittal generation screen Documents page, click on the **Show Tagged for Tags** tick box at the bottom left of the screen and you will see the selection of drawings that have been tagged automatically as shown below:

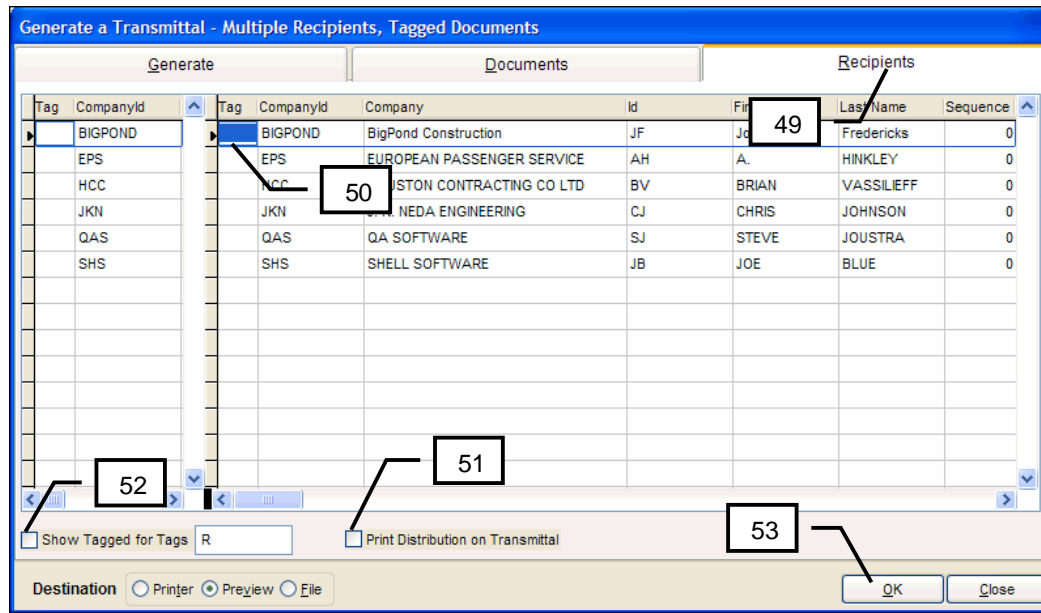
Tag	Document No	Rev	Sts	Title	Revision	Re
<input checked="" type="checkbox"/>	MA-215	0	6	MAIN STEELWORK DETAILS - SHEET 1	//	02
<input checked="" type="checkbox"/>	MA-216	0	6	MAIN STEELWORK DETAILS - SHEET 2	//	02
<input checked="" type="checkbox"/>	MA-217	0	6	MAIN STEELWORK DETAILS - SHEET 3	//	02
<input checked="" type="checkbox"/>	MA-218	0	6	MAIN STEELWORK DETAILS - SHEET 4	//	02
<input checked="" type="checkbox"/>	MA-219	0	6	MAIN STEELWORK DETAILS - SHEET 5	//	02
<input checked="" type="checkbox"/>	MA-220	0	6	MAIN STEELWORK DETAILS - SHEET 6	//	02
<input checked="" type="checkbox"/>	MA-221	0	6	MAIN STEELWORK DETAILS - SHEET 7	//	02
<input checked="" type="checkbox"/>	MA-222	0	6	MAIN STEELWORK DETAILS - SHEET 8	//	02
<input type="checkbox"/>	SE-226	0	-	SECONDARY STEELWORK DETAILS - SHEET 1	//	21
<input type="checkbox"/>	SE-227	0	-	SECONDARY STEELWORK DETAILS - SHEET 2	//	02
<input type="checkbox"/>	ST-248	0	3	STRUCTURAL STEEL SHOP DRAWINGS - SHEET 1	//	02
<input type="checkbox"/>	ST-249	0	3	STRUCTURAL STEEL SHOP DRAWINGS - SHEET 2	//	02

Note that the **Set Tags** button can be used to clear tags as well as automatically applying tags.

3.10 Transmit to Multiple Recipients

You are now going to generate another commonly used transmittal type which is a transmittal to Multiple Recipients. You should have selected this option at the start of Section 3.09. At this point you have selected the documents for this transmittal, but notice that the **Recipients** page (see the tab at the top right of the screen) is now active.

49. Click on the **Recipient** tab and you will see the screen below.



The **Recipients** page shows the contents of your Address Book. On a transmittal to multiple recipients, recipients can be Tagged in the same way that documents can be tagged on the drawings page.

50. Enter the value **R** in the tag column against the Recipients BigPond Construction Limited and HOUSTON CONTRACTING .
51. Click on the tick box adjacent to **Print Distribution on Transmittal** at the bottom center of the screen.
52. Click on the **Show Tagged for Tags** tick box at the bottom left of the screen to view only tagged recipients.

Note that if you use the scroll bar to scroll to the right of the grid, you will see columns for sequence, Copies, Reason etc. The **sequence** column is used to control the order in which the distribution will print on the transmittals. The **reason** is used to be able to define a different reason for issue against each tagged recipient if required.

53. Click **OK** to generate the Transmittals.

Note that a transmittal to Multiple Recipients creates a uniquely numbered transmittal for each tagged recipient. QDMS also supports generating a single transmittal to a circulation list but this is not covered in this guided tour.

The first transmittal generated after clicking OK is for the first of the tagged recipients. Send this transmittal to the printer (from the preview screen by clicking the print button) .

Note at the Save Transmittal screen that there is a **Save All** button which if selected, will proceed to generate and save the remaining transmittals for tagged recipients.

54. To see the next transmittal be generated, click **OK** rather than Save All.

Notice at the preview that this is to HOUSTON where as the first transmittal was addressed to BIGPOND.

55. Print and save the transmittal as normal.

Back at the transmittal generation screen you will notice you are now up to transmittal number 11 for the next transmittal you will generate (click on the Generate page to see this).

56. Click the **Close** button and **Close** again when prompted.

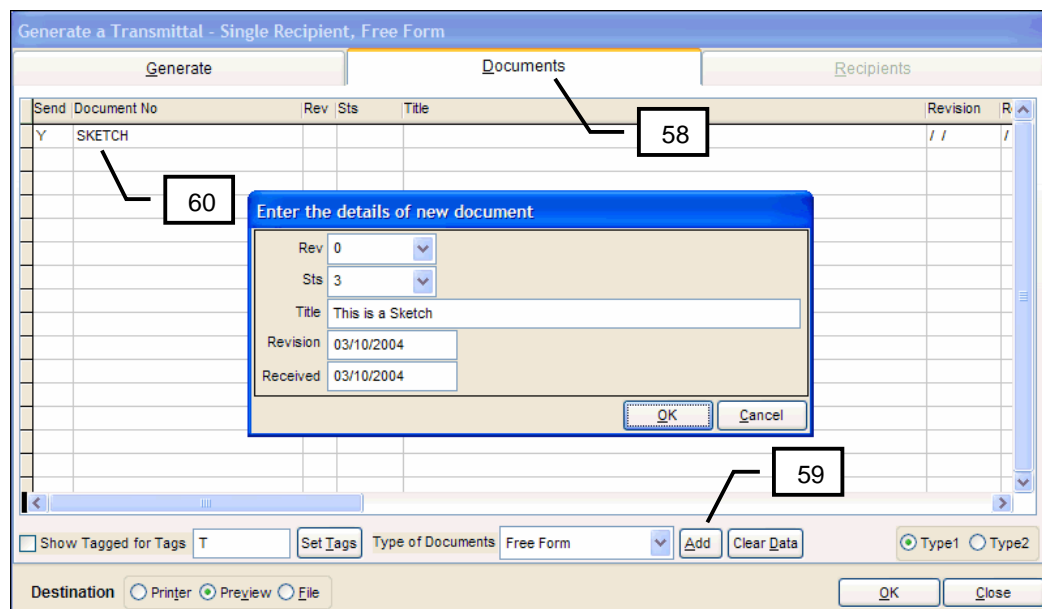
3.11 Using a Free Form Transmittal

There are times on a project when it is important to maintain a record that items other than controlled documents have been transmitted to recipients. This could include samples, a CD or diskette, or a report just to name a few. In addition to the above, there are also times when it is necessary to transmit a superseded copy of a document to a recipient. Since QDMS transmits only from the Master Document register which stores the latest version of documents, this is not possible via any of the transmittal methods you have seen so far.

The above scenarios are catered for in QDMS via a Free Form Transmittal which can be used to transmit superseded or other documents not contained in the Master Document Register.

57. From the **Transmit** menu, select **Free Form Transmittal**.

58. At the transmittal generation screen, click on the **Documents** page.



You will notice **Add** and **Clear Data** buttons at the bottom center of the screen.

59. Click the **Add** button and press **Tab**.

60. Type **SKETCH** in the Document Number field and press **Tab**.

Since this document is not in the Master Document Register you will be prompted to complete the New document window details. Note however that this document will NOT be added to the Master Document Register but the details WILL be saved in the Transmittals History.

61. Complete the details for **Rev**, **Sts**, and **Title** for the Sketch as shown above and click **OK**.

Note that to transmit a superseded version of a document for which the current version is in the Master Document Register, type the correct Document Number in the field provided and the current details will appear. To change the revision back to the required value, you must first adjust the document number. It is recommended to add an * or . to the end of the document number. You will then be able to edit the Revision via the New Document Details window. The change to the document number is forced as this ensures that the document is identified as NOT being the current Revision when transmitted.

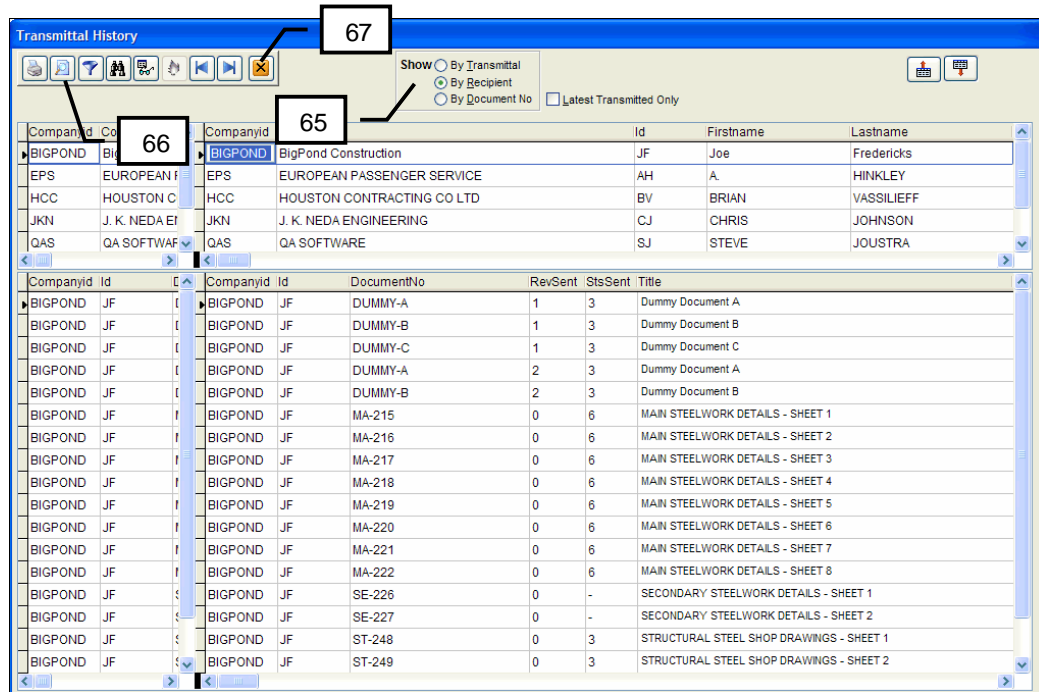
62. Click **OK** to generate the transmittal and print and save as normal.
63. Close the Transmittal Screen as normal.

3.12 Viewing the Transmittal History

After completing the tasks above, you will now have a more interesting transmittal history and it is worth taking another look at this information now.

64. From the **View** menu, select the sub menu **Transmittal History**.
65. Click on the **By Recipient** radio button at the top center of the screen to change the view.

Locate the Recipient BIGPOND in the top half of the screen and click on this row.



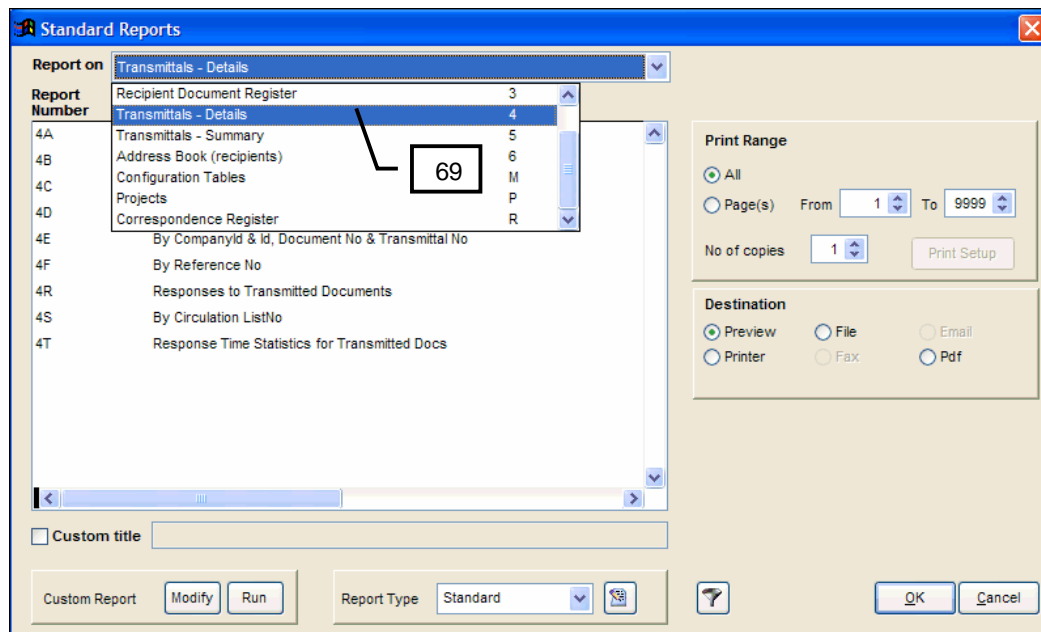
Notice that there are now a large number of documents transmitted to BIGPOND. The transmittals history is an auditable record of all documents transmitted to a recipient. To see only the **latest** versions of documents transmitted to BIGPOND, click on the check box at the top of the screen for **Latest Transmitted only**.

66. Try clicking the **Print Preview** button to see the example report for the transmittals screen.
67. Click the **Close** button.

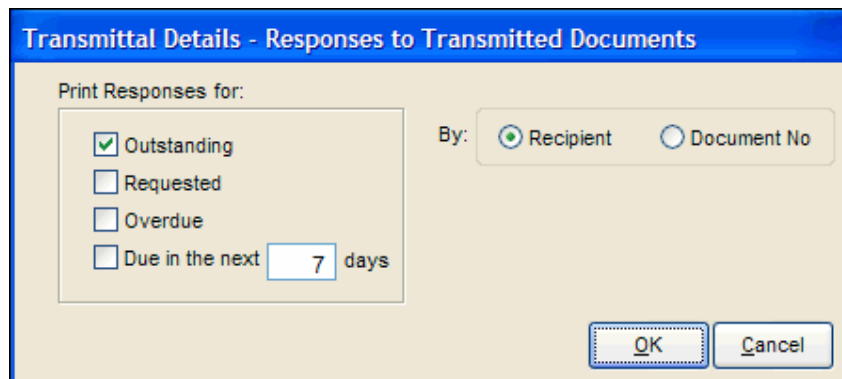
3.13 Tracking Responses and Acknowledgements

Your last task in this Advanced Guided Tour is to generate a few of reports. Managing the responses to document issues such as approvals required, is often a time consuming task. Getting acknowledgements back from Recipients to prove that they received the documents is equally hard. QDMS has a number of reports to assist with this process.

68. From the **File** menu, select **Print Standard Reports**.
69. Click on the **Report on** drop down list and select **Transmittals - Details** as shown below:



70. Double click on Report Number **4R – Responses to Transmitted Documents**.



71. Click **OK** to generate a report list all documents that have been transmitted which both require a response and for which the response is outstanding.

Other options at the above window are further filter for only responses overdue or due in the next few days.

72. Close the preview after reviewing the report on the screen and click the Cancel button at the above window .
73. Change the Report on selection to **Transmittals – Summary** at the top of the Report Generation window.
74. Double click on Report Number **5C – By Trmtl No – Acknowledgements Outstanding** to print a list of Acknowledgements Outstanding. Again close the preview after reviewing the report on the screen.

Note that you could generate the above reports to Excel and email them to the recipients if required (see Other things to try in Section 3.14).

Also to update QDMS when Acknowledgements or Responses are received, go to the Transmittals screen (from the View menu) and with the View set on Transmittals, complete the **Ackndate** and **Rspnrcvd** fields accordingly.

3.14 Other things to try

You have now completed the Simple and Advanced QDMS guided tours. There are still many features of QDMS for you to explore. Some to try are as follows:

Export data to other applications: From the Wizards menu, select Export Data Files to export file types Excel, Lotus ...

Import and Export of Transmittals: QDMS supports import and export of transmittals from and to other QDMS users. This can save a large amount of data entry on larger projects. Go to the Wizards menu and Export/Import Transmittal.

Emailing of Transmittals: If you send electronic versions of documents to recipients, QDMS can generate an electronic transmittal and what is more, it can also zip and auto attach the documents you are sending without leaving the program. Go to the Transmit menu and select e-Transmittal to generate the Email – Copies of Transmittals page. Note that you will have had to define the path and file names for your electronic document versions in the Master Document register first.

Print Reports to Excel: Have you ever wanted to generate a report and then email it to someone? Try File\Print Standard Reports and on the Right hand side against Destination Options, choose File and then Excel. This will publish any QDMS report to an Excel sheet.

Chapter 4 - Appendices

Appendix A Quick Start Instructions for Installing QDMS

Appendix B File Formats supported by QVIEW

Appendix C Work Flow for Initial Transmittal Generation

Appendix D Work Flow for Transmittal of Revised Documents

Appendix E Examples of some Customisations for QDMS

Appendix A – Quick Start Instructions for Installing QDMS

This set of instructions is provided to enable those familiar with installing software to get up and running with QDMS fast. These Quick Start instructions however, contain the key steps to installing and setting up QDMS.

A.1 System Requirements

The system requirements for running QDMS are:

Hardware/Software	Minimum Requirements	Recommended Requirements
Computer/Processor	Pentium 250	Pentium 800
Memory (RAM)	64 MB	128 MB
Available Hard Disk Space	30 MB	80 MB
Display	800 x 600 16 Bit	1024 x 768 16 Bit
Operating System	Windows 98, Windows Me, Windows 2000, Windows NT, Windows XP	Windows 98

A.2 Software Installation

A.2.1 The Windows Installer

The Installation of QDMS requires the **Windows Installer**.

If you are running Windows NT 4.0 or Windows 98, you must first update your Windows Installer to version 1.1 before installing QDMS. Contact QA Software to obtain details of how to get the latest Windows Installer.

If you are running Windows 2000, you already have this installer and there is no need to reinstall this tool.

You are now ready to install the QDMS application.

A.2.2 Installing the QDMS Application

1. Insert the QA Software CD and if it auto loads, simply click the **Install QDMS** option at the QA Software menu and follow the installation instructions. QDMS will be installed in C:\Qasoft\Qdms\ by default.
2. A short cut icon on your desktop will have been created to access C:\Qasoft\Qdms\Qdms.exe

If the CD does not auto load:

3. Using Windows Explorer locate the D:\Qdms\Setup folder and double click on QDMS.msi
4. Follow the install instructions as above.

If you downloaded QDMS from the Internet:

5. Using Windows Explorer double click on the QDMS.msi file you downloaded.
6. Follow the install instructions as above.

A.3 Configure your work station

1. If your monitor is not already set to a display of 800 x 600 pixels, you should change it to this setting before proceeding. To do this, right click on any blank space on your desktop, select Properties and then the Settings tab. Adjust the screen resolution to 8 00 x 600 pixels.
2. Create a shortcut icon on your desktop (if one was not automatically created during installation) to access the QDMS.EXE (Located by default in the folder C: \Qasoft\Qdms\)

A.4 Running the QDMS System

7. Double click the QDMS icon on your desktop. (Or use Start | Programs | QA Software | QDMS).
8. At the login screen, the User ID = QA and the password is also QA.
9. Select the Demonstration project by double clicking on the Project Name and you will be located at the Quick Menu. This is the starting point for all QDMS actions.

A.5 Creating a Project

Before creating your first live project you should have worked through the QDMS Guided tour using the Demonstration project. When you are ready to create your new project:

1. From the **File** menu select **New Project** and click **Next** at the Welcome screen.
2. Enter the Project Number and Title and click **Next**.
3. At the Data Transfer screen, choose the **Do not populate** option so that you will create a completely empty first project.
4. Complete the remaining screens as required and click **Finish** when done.

On completion of this you will be positioned in your new project automatically.

A.6 Where to next

Before you start processing documents and generating transmittals, the following areas of QDMS should be configured:

A.6.1 Populate the Address book

QDMS supports the use of either a Project or Global Address Book for each project. For instructions on setting up your project address book, refer to the QDMS User Guide.

The Address Book is located under the **View** menu and sub-menu **Address Book**. Note that the Address book is structured in two parts: Companies and Contacts. You must first setup companies before you can create contacts within each company.

A.6.2 Setup Users

Security in QDMS is controlled via User ID's and passwords. You will need to create a User ID for each staff member requiring access to the system.



1. From the **Tools** menu select **Security – Users and Projects**.
2. Click on the **Create a New User** button and complete the details about the new user.

Tip: Set the User ID as the initials of the new user). The User should be allocated User Level 1 access at this stage.

3. Select the Projects that the new user may access by clicking on the **Assign Users to Projects** button and select from the list of projects in the left pane by double clicking on them.
4. Return to the Dashboard and from the File menu, select Re -enter password to log in as the new user.

A.6.3 Populate the Configuration Tables

There are a number of miscellaneous libraries in QDMS that support drop down lists in various screens. You should populate these tables with values to suit your business.

The Configuration Tables are located under the option **Configuration Tables** from the **View** menu. Refer to the User Guide for more details.

Tip: See also the Quick Start Check List at the end of Chapter 1 of the QDMS User Guide.

A.7 Installation of QVIEW

QVIEW is QDMS's optional integrated CAD viewer which is purchased as an add on module. To evaluate QVIEW you will first need to install it as follows:

10. Insert the QA Software CD and if it auto loads, close down the auto loaded screen.
11. Using Windows Explorer locate the D:\QView\Disk1 folder on the CD and double click on Qview.msi
12. Follow the on screen setup instructions.
13. Run QDMS and from the Tools menu, select Options and then Program Defaults. Click Edit and select the viewer as QVIEW. Then click Save.

A.8 Support

If you are having any problems with getting our software installed or getting started, please don't hesitate to contact our Technical Support Division by Phone: +61 (3) 9326 8455, Fax: +61 (3) 9326 6544, Email: support@qa-software.com

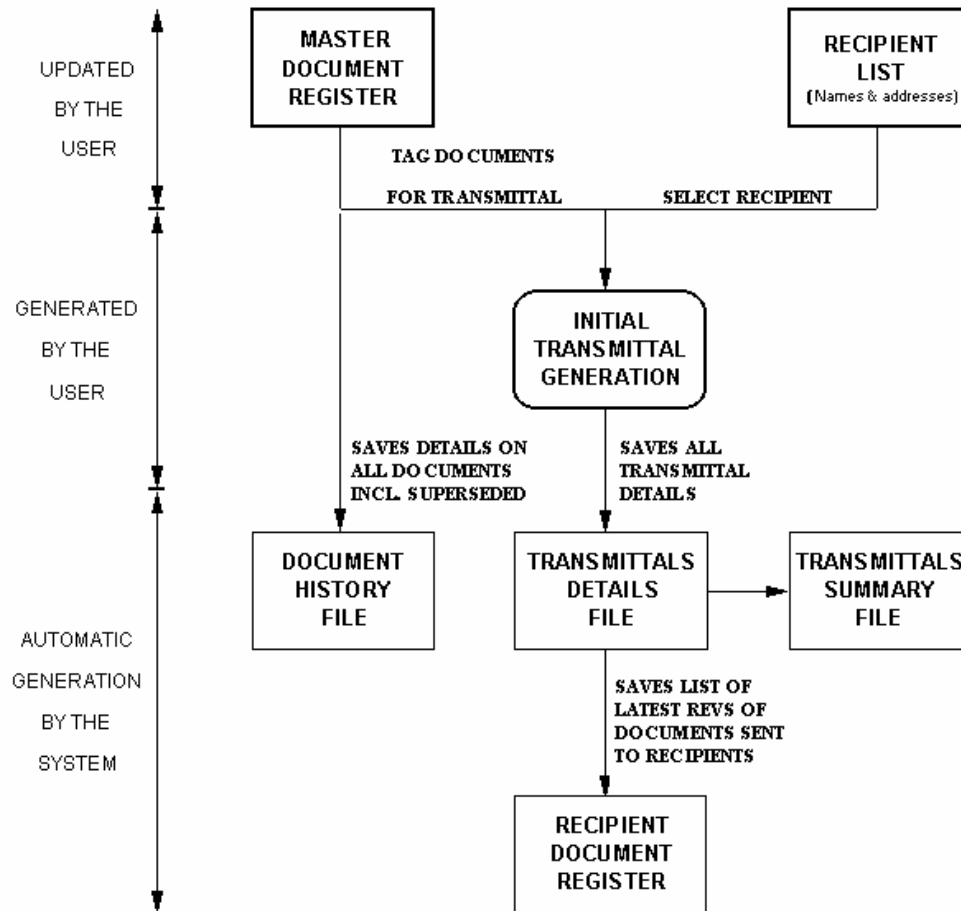
Appendix B - File Formats supported by QVIEW

QVIEW is the optional integrated viewer for the QDMS Drawing Management System. The File Formats supported by QVIEW as listed below:

File Ext.	Description	File Ext.	Description
DRW	Anvil 1000	SAT	ACIS SAT File
BGP	Rx Autolmage	VEC	Data Design Systems
CCP	Calcomp	DRW	Personal Drg
CG4	CALS Raster	XWD	X – Windows
CGM	CGM File	XBM	X - Windows Bitmap
CIT	Integrgraph Raster	RAS	SUN Bitmap
DWF	AutoDesk DWF	IFF	Amiga IFF
DWG	AutoCAD	SLD	AutoCAD Slide
CRF	Calcomp Raster	XLS	MS Excel 97
DGN	Microstation	DOC	Word 97 Doc
DXB	AutoCAD	RTF	Rich Text Format
IG4	Image Systems G4	WPD	WP 6.0/Win
FLX	FelixAD	TXT	Text Files
GBR	Gerber	BIN	Binary Files
TG4	Integrgraph Tiled G4	HTM	HTML
PRT	CadKey Print	DCX	Intel Fax format
MI	MP ME 10/30	GIF	Compuserve GIF
PLT	HP-GL/2	JPG	JPEG Picture
PSL	RxAI Edit Hybrid	PCX	PC Paintbrush PCX
REF	GTX Raster CAD	WMF	Windows Meta File
RES	CAD Overlay	BMP	Windows Bitmap
RLC	Run Length Coded	TGA	Targa
RND	AutoCAD Rendering	TIF	TIFF Bitmap
TG4	Tiled G4	RGB	Integrgraph RGB
VC4	Rx Vectoring	PNG	Portable Network Graphics
VC5	Rx Spotlight	RLE	Integrgraph RLE
WS	Rx Spotlight	PDF	Adobe Acrobat
XWS	Rx Workspace		

Appendix C - Work Flow for Initial Transmittal Generation

The process of generating transmittals in QDMS is basically a combination of selecting documents from the Master Document Register and selecting a Recipient to send these documents to from the address book. The flow diagram below details the actions that occur during the generation of a transmittal of tagged documents to a recipient for the first time.

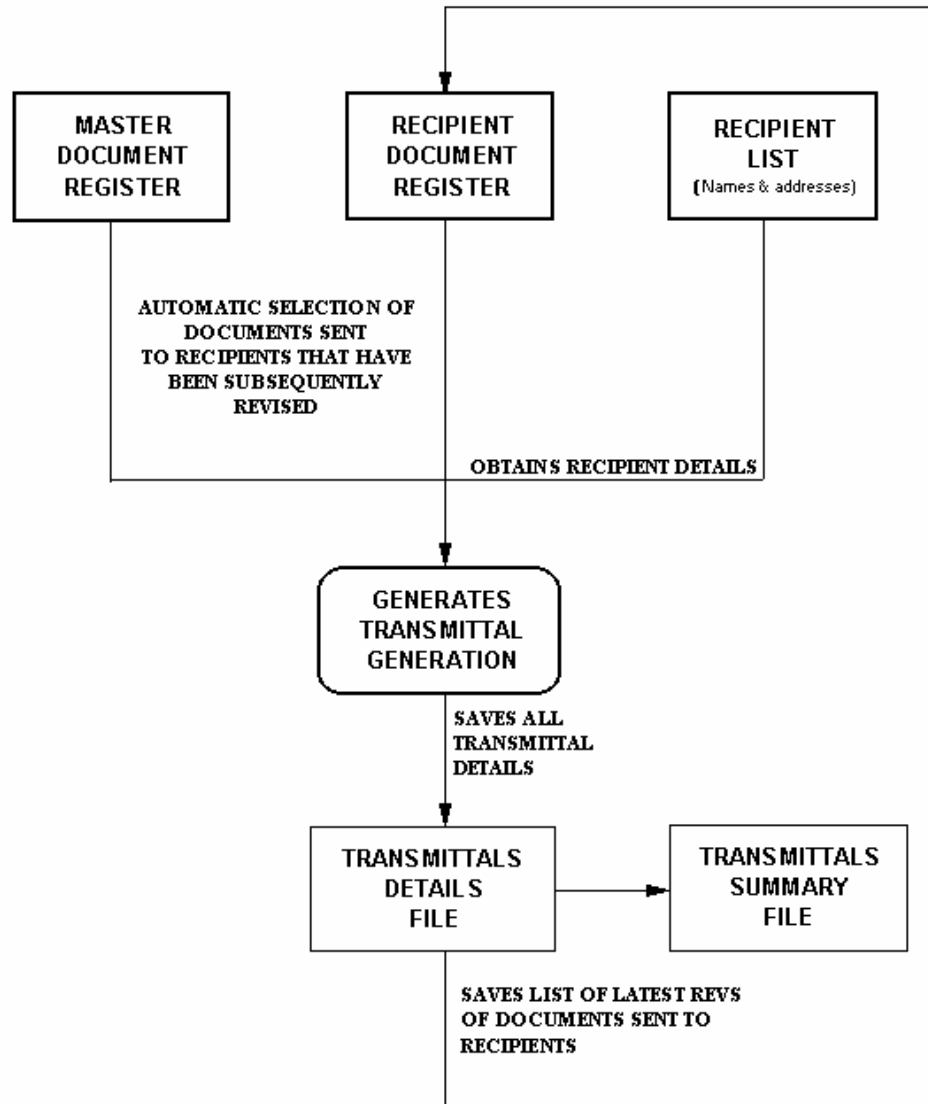


Notes:

- Since Documents are selected for transmittal from the Master Document Register, this ensures that only the **latest** revision of documents are transmitted.
- Transmittals once generated are saved in the Transmittals file. This is like a filing cabinet of transmittals and cannot be edited.
- As transmittals are saved, the Recipient Document Register, which can be thought of as storing the distribution of documents, is also updated.
- Note that in QDMS there is no requirement to build a distribution matrix to enable transmittal generation. The process is simply a matter of selecting documents, recipients and generating the transmittals. QDMS builds the distribution (or matrix) for you automatically and this is stored in the Recipient Document Register.

Appendix D - Work Flow for Transmittal of Revised Documents

The flow diagram below details the actions that occur during generation of transmittals for the issue of revised documents to a recipient who has previously received these documents.



Note:

The automatic selection of drawings in the above process is as follows: The revision status of documents in the Recipient Document Register is first compared by the system with those in the Master Document Register. Only those documents in the Recipient Document Register that do not have the current revision number in the Master Document Register are selected for transmittal.

In order to prevent the system from generating numerous transmittals as soon as the revision status of a document is changed, the above will only take place automatically, when requested by the user. It is therefore recommended that such a request be carried out on a regular basis as a part of the QA Document Control Procedure (at least weekly) or more frequently after major updates to the Master Document Register.

Appendix E - Examples of some Customisations for QDMS

QDMS has been often customised for individual clients to meet their specific requirements since it's creation in 1995.

Some of the common customisations include:

- Auto Numbering
- Enhancements for the management of the Internal Document Review Process
- Management of progress during the Design Phase
- Preparation of Custom Reports

In the next few pages are some images of customised screens prepared for individual clients. Please contact QA Software if you think you require any customisation of QDMS.

Example of an Auto Numbering screen for Document Registration prepared for Devon Energy in Jakarta, Indonesia.

New Document Registration

New/Edit Doc (Manual) | New Doc (Auto)

Proj. Identifier: NG01 | NORTH GERAGI FIELD

Document Type: Engineering | Unit: 010 | Discipline: 40 | Type: DBM | Size: 1 | Sheet No: 01

Vendor | Requisition: | Unit: | Tag No: | Type: |

Data Sheet/Duty Spec | Unit: | Discipline: | Type: | Size: | Tag No: |

Document No: NG01-010-40-DBM-1-001-01 | Document NG01-010-40-DBM-1-001-01

Rev: AAA | Title L1 (Type): Example Secondary Document Title field

Sts: A | Title L2 (Details): Example Tertiary Document Title Field

Revised: 29/03/02 | From Company: QAS

Vnd Doc No: | Transmittal Received: |

Alt Doc No: | Date Received: / /

File Name: | Select...



Clear Form | Save | Close

Example Custom Menu prepared for BP Indonesia

Custom
Document Details
Document Register - Wbs Codes ▶
Reports ▶
Define Element Attributes
Define Element Values
Define Circulation Lists
View Approval Status
View Vendor Status
View Sections
View Sub-Sections
View Classes and Milestones
Cancel a Circulation Type IDR
Assign Weights to Documents
Add New Fields to MDR
Reindex Milestone File
Edit Project Details

A Custom Document Details screen prepared for BP Indonesia that includes auto document number plus management of the entire document review and approval process from a single screen.

Example Internal Document Review Sheet developed for BP Indonesia. Notice that this allows for Multiple Circulation Lists on the same Transmittal when using a Flood Issue.

	TANGGUH GPF PROJECT				
	INTERNAL DOCUMENT REVIEW SHEET				
DATE : 29/03/02		IDR REF : P/00002 FILE REF : 34			
DOCUMENT No	TITLE	REV STS			
00-AA-CC-88-0003	Drawing 00-AA-CC-88-0003	0 0			
NAME	POSITION	DATE IN	DATE OUT	COMMENTS Y/N	INITIALS
Circulation List: 1 BP Internal Staff					
1 Mr. A. HINKLEY					
2 Mr. BRIAN VASSILIEFF					
3 Mr. STEVE JOUSTRA					
4 Mr JOE BLUE	CEO				
Circulation List: 2 Other BP Departments					
5 Mr Joe Parson	Quality Manager				
6 Mr. A. HINKLEY					
7 Mr. BRIAN VASSILIEFF					
8 Mr. STEVE JOUSTRA					
9 Mr JOE BLUE	CEO				
ISSUE TYPE :FLOOD					
TO : Mr. A. HINKLEY					
Your approval is required by 18/04/02					

Custom Scheduling screen developed for Clough Engineering, Western Australia. Allows for the definition of Document Classes and Milestones with auto scheduling and for ecasting built in.

Setting up Schedule Dates in the MDR

Replace Forecast with actual for non-blank actuals Auto-Calculate Schedule
 Auto-Calculate Forecast Revise Actual Dates

Document No: PR-00006 Rev: 0 Sts: 0 Title: Document PR-0006

Division: 013 Category: C Element: 0 Function: 1 Work Level1: 15 Work Level2: 952 Work Level3: 1

Document Class: GA Populate Milestones: Pct: 0 Act Hrs: Bud Hrs: 76.00 Weight:

Milestone	Title	Scheduled	Forecast	Actual
1	Start Drawing	01/01/2002	01/01/2002	/ /
2	Issued for Checking	11/01/2002	11/01/2002	/ /
3	Issued for Construction	31/01/2002	31/01/2002	/ /
4	As Built	22/03/2002	22/03/2002	/ /

Example custom report also developed for Clough Engineering, Western Australia

Engineering and Design Progress Report

PROJECT PR01
 Client : My Client

Page : 1
 Report No : 112
 Run Date : Friday, 29 March 2002

Document No	Rev	Doc Class	Title	WBS			
PR-00006	0	GA	Document PR-0006				
			Milestones	Description	Pct	Actual	Forecast
			1	Start Drawing	10	01/01/2002	01/01/2002
			2	Issued for Checking	60	11/01/2002	11/01/2002
			3	Issued for Construction	90	31/01/2002	31/01/2002
			4	As Built	100	22/03/2002	22/03/2002
PR-0001	0	GA	Document PR-0001				
			Milestones	Description	Pct	Actual	Forecast
			1	Start Drawing	10	01/11/2001	01/03/2001
			2	Issued for Checking	60	11/03/2001	11/03/2001
			3	Issued for Construction	90	31/03/2001	31/03/2001
			4	As Built	100	20/05/2001	20/05/2001
PR-0002	0	GA	Document PR-0002				
			Milestones	Description	Pct	Actual	Forecast
			1	Start Drawing	10	01/11/2001	01/05/2001
			2	Issued for Checking	60	11/05/2001	11/05/2001
			3	Issued for Construction	90	31/05/2001	31/05/2001
			4	As Built	100	20/07/2001	20/07/2001