



# QTRAK

Correspondence  
Management  
System

**GUIDED TOUR**

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## **Chapter 1 - Introduction**

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## 1.01 Introducing QTRAK

QTRAK is a **Correspondence Management** system for the management of project information. Typical examples of the types of information QTRAK can be used to manage are:

- Requests for Information.
- Letters, faxes, and memorandums.
- Site Instructions.
- Advice Notices.
- Non-conformance reports.
- Variations/change orders.
- Daily work reports.

QTRAK is multi user and network compatible by design. It is ideally suited to be deployed over a Local Area Network.

The main features of QTRAK are:

- Generation, recording, and management of outgoing correspondence.
- Sending of outgoing mail by Email , Fax or Hardcopy.
- Recording and management of incoming correspondence.
- Scanning of incoming correspondence if required.
- Linking of related correspondence and documents.
- Grouping together of related correspondence via electronic filing.
- Management of actions arising from correspondence.
- Document retrieval via search and find.

## 1.02 Introducing Mail

QTRAK uses the terminology “mail” to describe an item of correspondence that has a “**To**” and a “**From**”. All mail in QTRAK is accessed through a single screen called the “**Master Document Register**” even though all mail types are stored in separate database files.

There are a number of components to any item of mail:

- General fields such as Reference Number, Subject, and Date.
- A **Distribution**, which defines who the correspondence is To, and any other distribution items such as **Copies to**.
- **Linked** documents, which are used for generating cross -references between documents.
- **Attachments**, which are used for attaching documents that have been created in other applications.
- **Binders**, which are used for grouping related documents or electronic filing.
- **Actions**, to define and delegate actions to be taken on correspondence.

## 1.03 Outgoing Correspondence

QTRAK can be used to manage project correspondence both to external companies, and to other project team members within the same company.

In most situations this will mean actually generating and sending correspondence items using QTRAK (ie. without creating a hard copy unless required). In other situations, where the correspondence has been created either via another computer application or using a handwritten form, the outgoing correspondence is simply registered in QTRAK. If the original documents are in electronic form (such as an Excel file) they can be attached to the entries in QTRAK.

The transmission methods for sending outgoing correspondence range from printing hardcopies, to internal and external email, and automatic faxing assuming email and a modem are available.

## 1.04 Incoming Correspondence

Incoming Correspondence consists of emails, hardcopies, faxes etc.

Incoming Correspondence received by traditional means is registered in QTRAK with as much of the detail of the item entered as required. If necessary, the incoming item can be scanned using the integrated scanning functionality in QTRAK and the resulting image linked as an **Attachment** to the QTRAK entry.

With the eCorrespondence add on module, email from popular email clients can be imported directly into QTRAK.

QTRAK also supports the use of a dedicated project for pre-processing of incoming correspondence in situations where there are large numbers of smaller projects on a single installation.

Regardless of which of the above methods are used, QTRAK facilitates simple generation of responses to incoming correspondence and the ability to assign and manage actions arising from incoming items.

## 1.05 Links and Electronic Filing

Linking related correspondence enables powerful cross-referencing of documents. Documents can be **Linked** (cross-referenced) manually or automatically in QTRAK.

In addition to cross referencing by the linking of related documents, QTRAK uses “Binders” to provide an electronic filing system.

Binders are ideal for grouping documents relating to particular issues, or for managing variations. A **Binder** might be created for “Issues” and **Sections** within this binder, created for each individual issue. All correspondence (incoming and outgoing) relating to a particular issue can then be filed in the relevant section within the “Issues Binder”.

The use of binders in QTRAK enables tight control of the large amounts of correspondence generated on projects.

**Binders and Sections** simulate the way correspondence is filed using manual systems. For example, in a manual system, outgoing letters may be filed in a lever arch file for outgoing letters and then copies taken for filing in a separate claims file. QTRAK documents can be allocated to as many binders/sections as required.

Note that while Binders and Sections provide a simple two level filing system which is sufficient for most projects, QTRAK also includes a **Multi Level** filing alternative. This allows an unlimited number of filing levels to be created, much like using Windows Explorer, although in QTRAK there is always only a single copy of any document, regardless of how many locations it may appear to be filed in.

## 1.06 Actions

Management of actions arising from incoming or internal correspondence and the expediting of responses to outgoing correspondence are a key feature of QTRAK.

Incoming documents are entered in to the **Master Document Register**, and actions assigned to one or more team members. When a user logs into QTRAK, the **Task List** on the Master Document Register will display all actions assigned to them with reference to the associated documents.

Administrators/managers can review all outstanding actions by responsibility. Users see only their own outstanding actions.

For the expediting of responses to outgoing correspondence, QTRAK generates expediting reports for both **outstanding** or **overdue** responses.

## 1.07 Search and Find

QTRAK is a fast, easy to use and a controlled method of creating and recording incoming and outgoing correspondence. However, retrieving or searching for documents at a later stage is also a key feature of QTRAK. There are a number of alternatives included with the program for this purpose. These are:

**Filtering:** This is a structured search for say, "all correspondence received in the month of March from Joe Bloe that has the word Concrete in the Subject".

**Intelli Search:** This is a text search through the complete QTRAK System for correspondence containing a key word or string of words. All fields in the system are searched.

**Binders/Sections:** The Binder view is a good way to find correspondence relating to a filing reference.

## 1.08 How to get started with QTRAK

QTRAK requires installation of some software. This can be obtained from [www.qa-software.com](http://www.qa-software.com) or by contacting QA Software on:

Phone: +61 (2) 9326 8455  
Fax: +61 (2) 9326 6544  
Email: [sales@qa-software.com](mailto: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 – Guided Tour**

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- 2.02 The Master Document Register
- 2.03 Creating a New Mail Item
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## 2.01 Login

If QTRAK has already been installed on your Desktop but you are not at the Login screen, you need to start the program by clicking on the Start button, selecting Programs, locating the work group QA Software, and selecting the QTRAK Correspondence Tracking System. You will then be presented with the Login Screen. Alternatively, if you have a short cut icon on your desktop for QTRAK, double click on this to start the program.

1. Enter the **User ID** as **QA** and press **Tab**.
2. Enter the **Password** as **QA** and press **Tab**.
3. Select the **Demonstration project** by double clicking on it, or just click on the **OK** button.

You should now be looking at the QTRAK **Dashboard**.

The screenshot shows the QTRAK Dashboard interface. At the top, the window title is "QTRAK Correspondence Management System - DEMONSTRATION PROJECT OF QTRAK" and the user is logged in as "JOE BLOE" on "Friday 08 October 2004". The dashboard is divided into several sections:

- Favorites:** A sidebar on the left with links like "Master Document Register", "Compact Files", "Address Book", "Binders & Sections", "Print - Standard Reports", "Exit", and "Show Alerts".
- Mail Statistics:** A central section with radio buttons for "My Mail" (selected) and "All Mail". It shows:
  - Incoming:** 4 Mail with Status Outstanding, 6 Mail with Responses Outstanding, 5 Mail Responses Overdue, 15 Total Items.
  - Outgoing:** 51 Mail with Status Outstanding, 24 Mail with Responses Outstanding, 24 Mail Responses Overdue, 99 Total Items.
  - Outstanding Actions:** 0 Tasks allocated to me, 3 Tasks allocated by me to others.
- Project Image:** A large image showing a modern building with the text "QA Software Project Information Management".
- Project Summary:** A text box stating: "The Demonstration Project of QTRAK stores some sample data which users can use to either evaluate or learn the QTRAK System. The text in this box and the image above can be modified for live projects via Tools/Options/Project Settings."

The footer of the window contains the following information:

- QTRAK : Version 5.00.00  
UNREGISTERED COPY FOR EVALUATION ONLY  
Copyright © 1997 - 2004 QA Software Pty Ltd. All rights reserved  
(C:\QTRAK\NEWQTRAK)
- QA Software Pty Ltd  
339 Queensberry Street  
North Melbourne VIC 3051  
Australia
- Ph : +61 (3) 9326 8455  
Fax : +61 (3) 9326 8544  
www.qa-software.com  
sales@qa-software.com

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

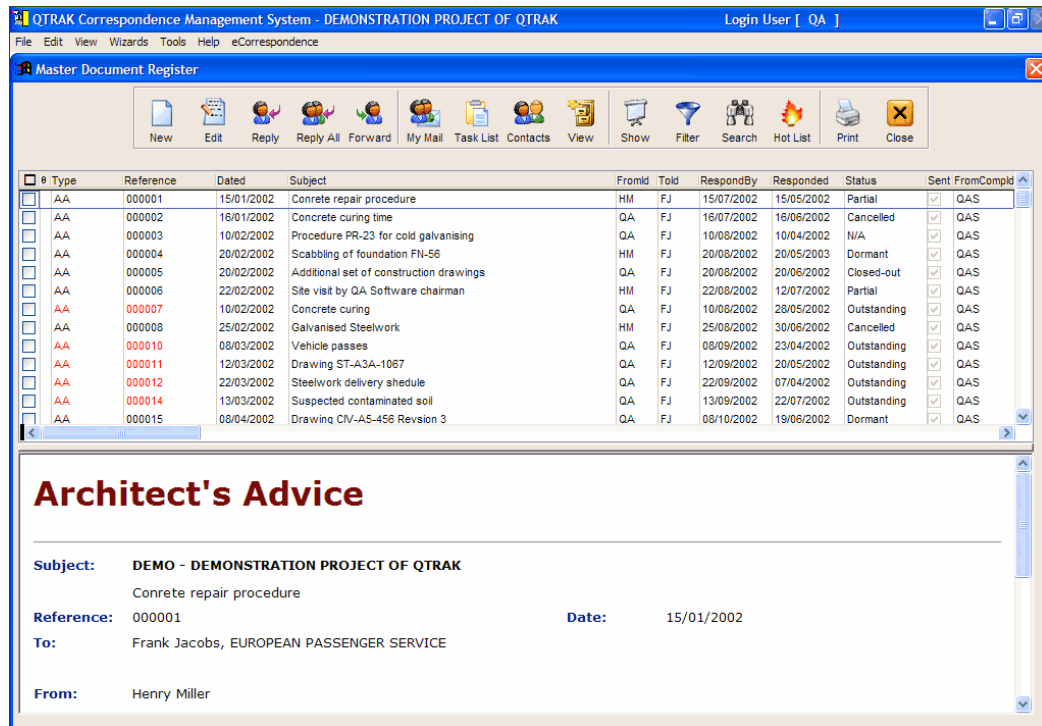
Displayed on the left are **Favorites** - some commonly used QTRAK menu items. These menu items are fully customisable for each user. During the tour you should use the Main Menu options rather than the short cuts on the Favorites list to gain familiarisation with the menu system.

Note that QTRAK is a **project based** system. Every project has its own set of data files, just like having a separate filing cabinet per project in the paper world. When logging into QTRAK the user selects the project they want to work with. Switching between projects is done from the **File** menu and sub menu **Open Project**. Storing QTRAK data this way provides for maximum flexibility. For example the use of different forms and report formats per project.

## 2.02 The Master Document Register

- From the **View** menu at the top of the screen, select the **Master Document Register**. (Alternatively, use the Favorites and select the Master Document Register option).

The Master Document Register is the starting point for the majority of correspondence related actions in QTRAK.



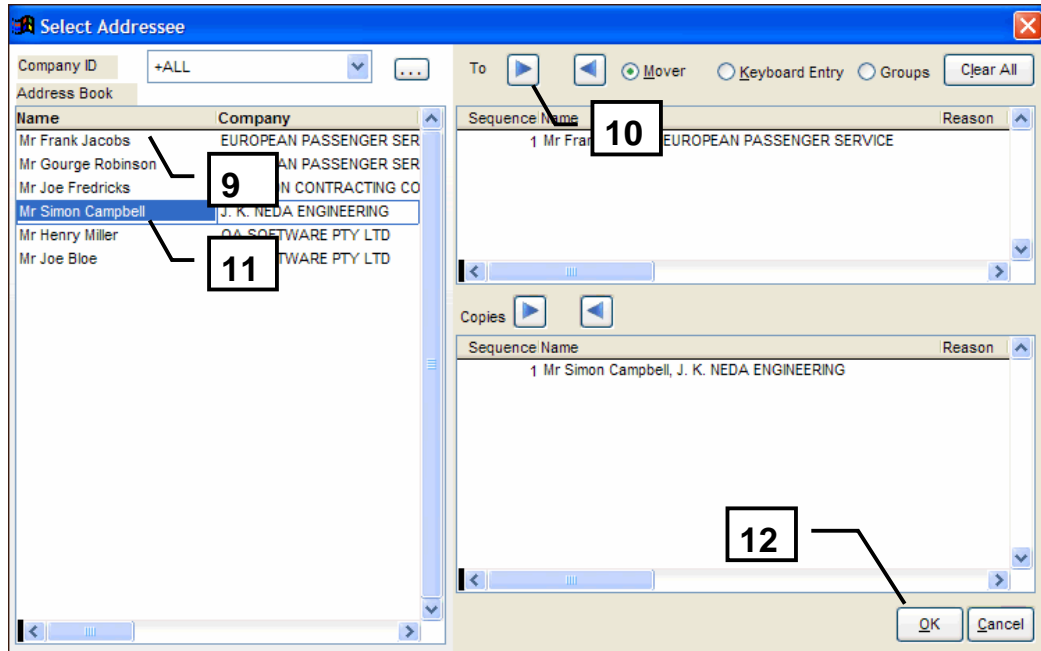
The **Master Document Register** displays a list of ALL correspondence entries stored in the system. The large buttons (Tool buttons) at the top of the screen are used to create or edit correspondence items and to operate on the register when searching for correspondence items.

The lower half of the screen shows a preview of the currently selected item of correspondence in the top half of the grid. The preview can be switched off by right clicking on any item on the top half of the grid and selecting **Preview Pane** which will un-select it.

Notice that the correspondence items in the Master Document Register are sorted (displayed) by default by first, the Type of document (in the above screen Architect Advices (AA) are displayed first), and then the reference number which is a unique identifier for each item.

- Try clicking on the column header for the column **Reference** to re-sort the order in which the mail entries are displayed. You should now see the items displayed by reference number regardless of correspondence type.
- To display only RFI's, click on the large **Show** button and select **Request for Information**. You will now be looking at a register of only RFI's. This register could be printed by clicking the large Print button. To return to displaying all correspondence, select **+ALL** from the **Show** button options.

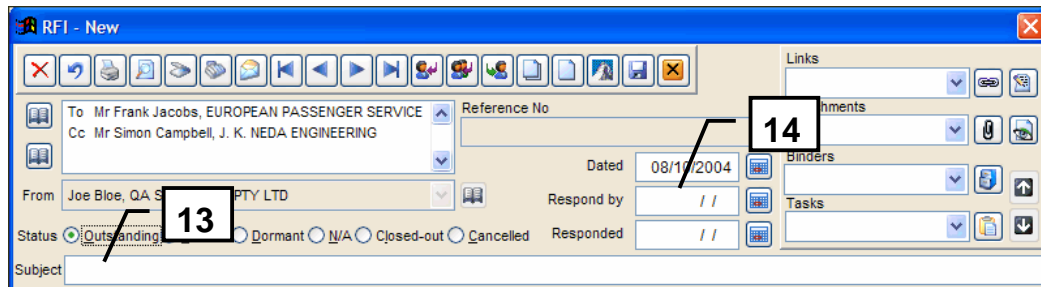




10. Click on the right arrow button adjacent to the **To** box to make this contact the addressee. (Alternatively, double click on the selected contact. The first contact double clicked will be the *To* value for the RFI. Other contacts double clicked will default to the *Copies* to window).
  11. Select **Mr Simon Campbell** from the left hand side of the window and this time use the **Copies** right arrow button adjacent to the Copies box to assign a copy of this RFI to this contact.
- Note that if you make a mistake in the above, contacts can be removed from the *To* and *Copies* windows by simply double clicking on them.
12. Click on the **OK** button to return to the RFI form.

## 2.05 Completing the Mail Header

Back at the mail form your screen should look like the one below:



The **Mail Header** (as shown above) contains information that is common to all QTRAK forms.

The bottom two thirds of the screen are called the **Mail Details** and contains information that is specific to each form type and hence will look different depending on what form type you are creating.

QTRAK supports multiple page frames for the Mail Details when large amounts of information needs to be captured. QTRAK also supports the use of a grid for the Mail Details section, for forms such as Variations where an unlimited amount of line items are required.

Notice also that the **Reference No** (the reference number of the new RFI above) is blank at this stage. A reference number will be automatically generated when the RFI is saved. Automatic referencing of correspondence in QTRAK is a key benefit to clients and a number of sophisticated numbering system alternatives can be supplied if required.

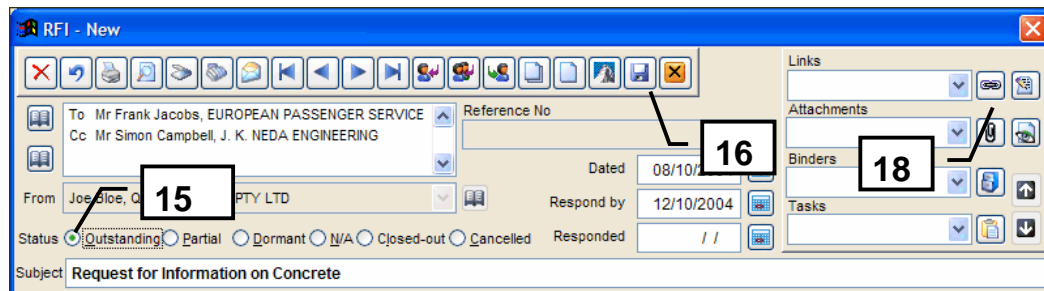
Fill in the remainder of the Mail Header details as follows:

13. In the **Subject** box, enter the subject as **Request for Information on Concrete**. This is effectively the title of the mail item.
14. Enter the **Respond by** date as four days after the **Dated** date. This is the date by which you require a response to the RFI. You can use the date picker button to simply select the date rather than typing it if you prefer.

Note that you can quickly check for overdue responses from the Master Document Register by clicking on the Hot List button – try this when you have returned to the Master Document register.

15. Set the **Status** to Outstanding by clicking on the appropriate radio button (This is the default).

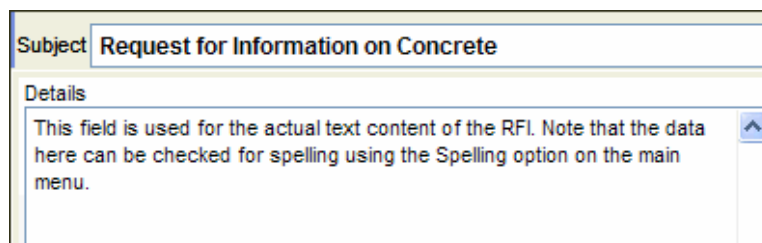
The Mail Header section of the RFI should now look as follows:



16. Save the document by clicking the **Save** tool button. The next sequential reference number will be allocated to this RFI.

Note that the FROM value defaulted automatically based on your USER ID when you logged into QTRAK. This rule can be modified if required via Tools \Mail Type Rules.

## 2.06 Filling in the Details



17. The detailed text or message is entered in the **Details** window in the lower half of the screen under Details.

The remaining fields on the lower half of the screen are examples only. See Chapter 3 for more examples of Mail Details for various mail types.

Note also that QTRAK has an in built spell checking facility that can be run from the main menu when in a mail form.

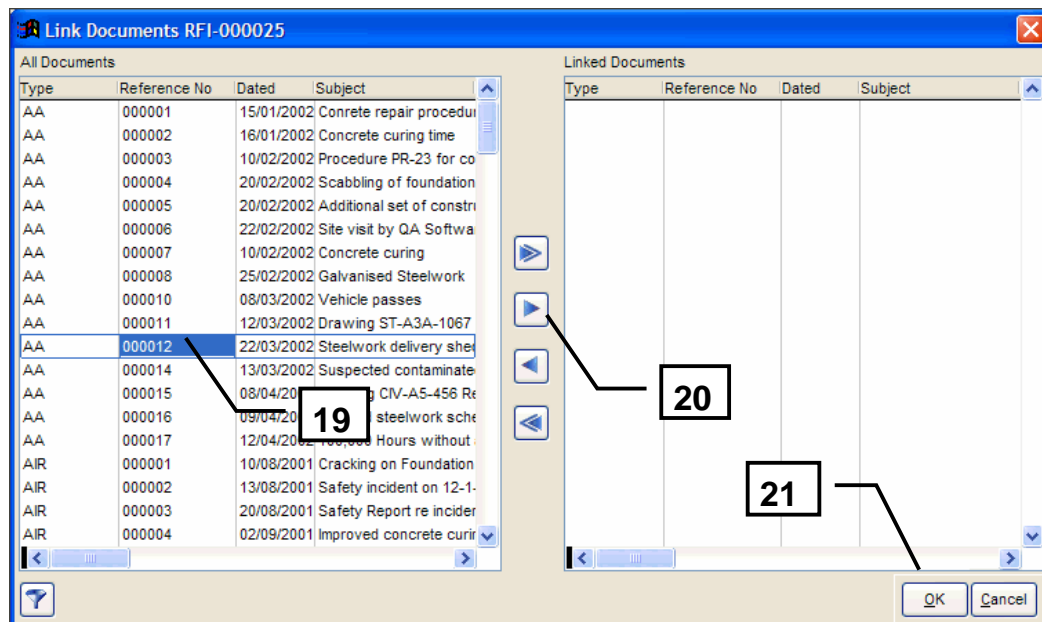
## 2.07 Adding Links

**Links** can be used to build a permanent “cross -reference” between one or more pieces of correspondence. For example, to relate an incoming item to an outgoing item. A document can have multiple links.



18. You can now cross-reference this RFI by clicking on the **Edit Links** button to the right of the Links drop down list in the top right corner of the screen.

The following screen will be displayed:



19. Select **AA 000012** from the left hand window (that lists all Documents).
20. Either double click on it or use the right arrow button to add it into the **Linked Documents** window. (Use the left arrow or double click to remove a selected item if required).
21. Click on the **OK** button to save the links and return to the RFI.

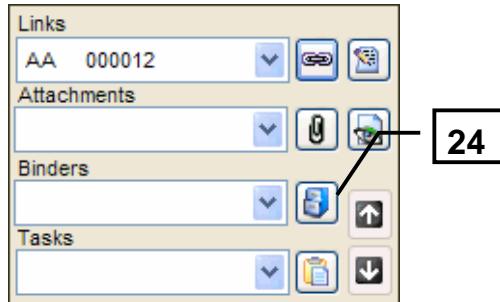
You will notice back at the RFI screen that there is now a link to this RFI.



22. You can move to the linked document by clicking on the **Show Linked Data** button to the far right of the Links drop down list. This will take you to the details of AA -0012.
23. Click the **Close** button to return to the RFI if you experiment with this.

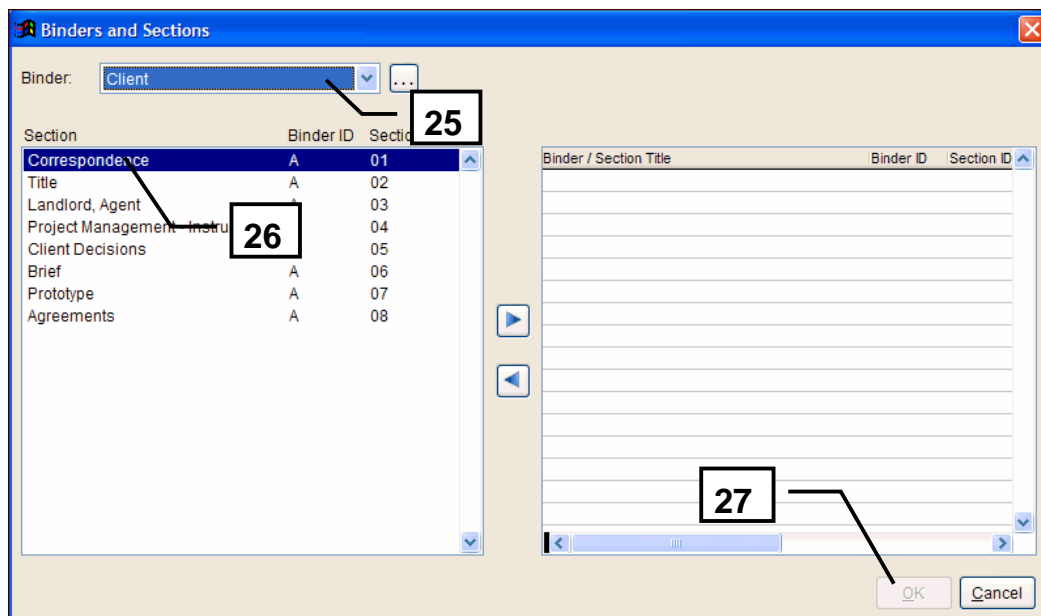
## 2.08 Filing via Binders

QTRAK supports two methods of electronic filing. Binders and Sections are the default method and provide a simple yet extremely popular method of filing. The alternative to Binders and Sections is the use of a Multi Level filing system. This is outside the scope of this Guided Tour.



24. Click on the **Edit Binders** button adjacent to the Binders drop down list, to file this RFI in a Binder.

This opens the **Binders and Sections** screen.



25. Click on the drop down list next to the word **Binder** and select the Binder as **Client** from the list.
26. You should now see a list of Sections that relate to the Binder Client. Double click on **Correspondence** to file this document in the *Client* Binder and *Correspondence* Section.
27. Click **OK** to save your selections.

Note that any item of correspondence can be “filed” in as many Binder/Section combinations as required.

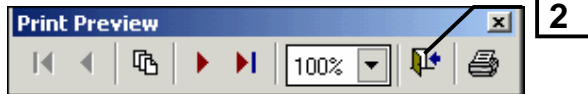
## 2.09 Printing and Sending the RFI

QTRAK can be used to send the RFI electronically either by email or fax to the nominated distribution. Alternatively the RFI can be printed out and sent by traditional means.



28. A printed copy of the RFI can be generated by using the **Preview** (or Print) button. Click the Preview button to Preview the RFI.

Note that the format of the RFI report is an example only. As mentioned previously in this Guided Tour, QA Software customise the form types and report formats for each client so that documentation coming out of QTRAK appears as per your company's existing documentation generated by other means.



29. Click on the **Close Preview** button on the Print Preview tool bar to return to the RFI screen.

The RFI can now be "**Sent**". There are two options:



- If the RFI is going to be sent as a **Hardcopy**, then print it and then click the **Freeze** button to the right of the Toolbar. This will make the key data in the RFI read only, preventing further changes to all but certain fields. This is useful to prevent other users inadvertently changing data after it has been "sent".



- If on the other hand the RFI is going to be emailed, simply click the **Email** report button on the toolbar and then click **Send** at the next screen. This action will also freeze the mail item.

Note that when a mail item is "Sent", the Date Sent and Time Sent fields in the Master Document Register are updated.



30. To return to the Master Document Register and save your work, click on the **Close** button. The document will be saved automatically.

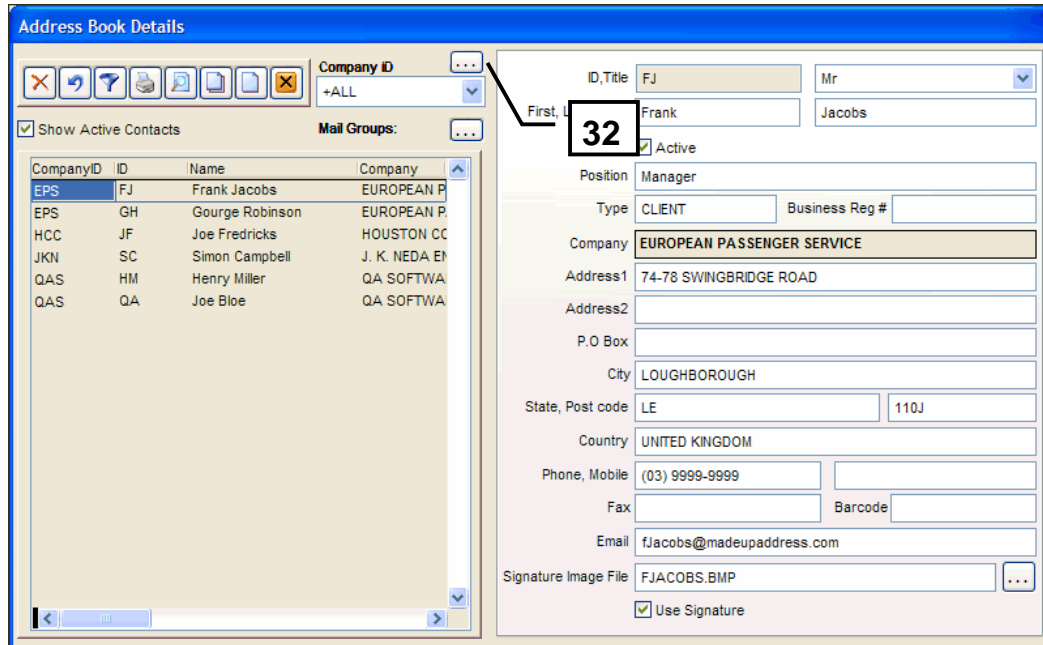
## 2.10 The Address Book

In sections 2.03 to 2.09 above you have created your first item of QTRAK Correspondence. The next step is to add a new contact into the QTRAK Address Book.



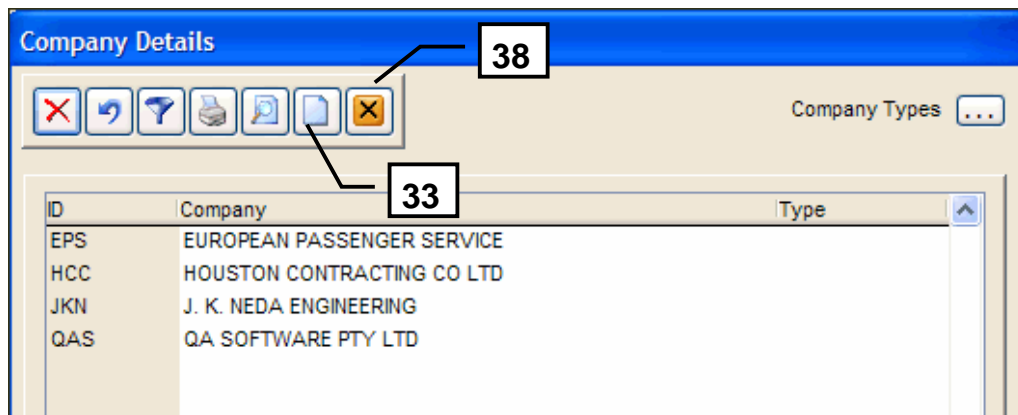
31. From the Master Document Register Toolbar, click the **Contacts** button.

The Address Book details will be displayed.



The Address book is structured in two levels: Companies; and Contacts within companies. To add a new contact within a new company, the company itself must first be created.

32. Click the **Edit Company Details** button.



33. Click the **Create a New Company** button.



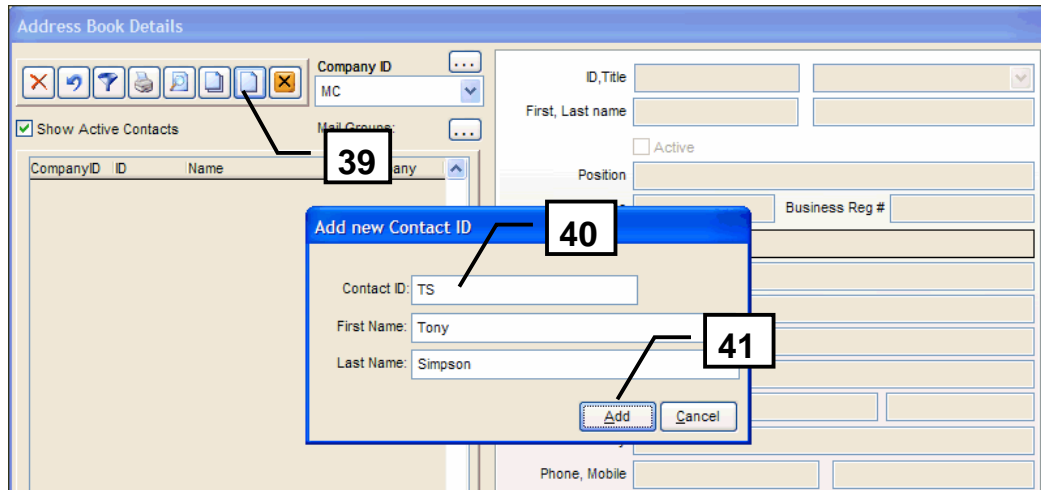
34. Enter the **Company ID** as **MC**.
35. Enter the **Title** of the Company as **My Company**.
36. Select the Company type as **SUB – Subcontractor**
37. Click the **Add** button.



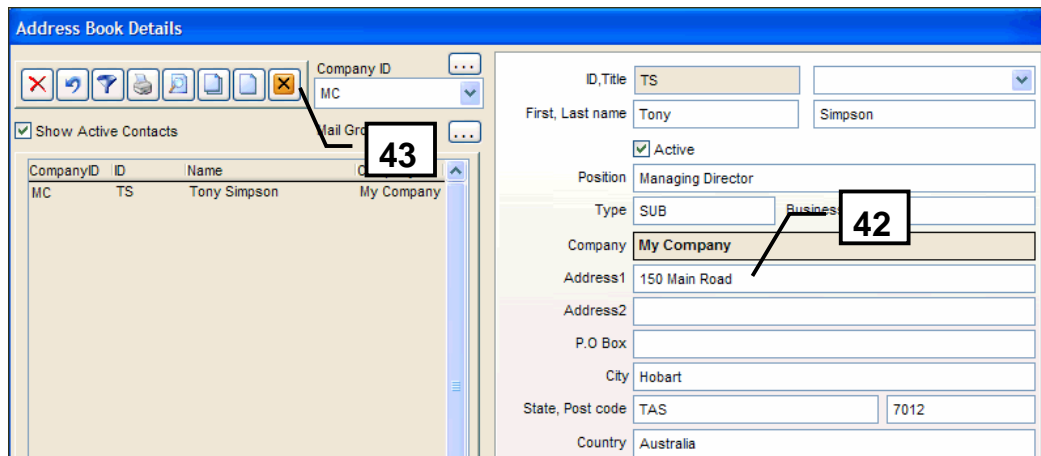
38. Click the **Close** button at the Company Details screen.

You are now ready to add the first **Contact** within the company **My Company**.

39. Click the **Create a New Contact** button.



40. Enter the contact ID as TS, and the First and Last Name as Tony and Simpson respectively.
41. Click the **Add** button.
42. Complete the address details in the right hand side of the contact details screen.



43. Click the **Close** button when done.

## 2.11 Create another Mail item.

To show the flexibility of the QTRAK mail screens, try creating a new Non Conformance, addressed to the company and contact created in section 2.10 above.

44. Click the **New** button at the **Master Document Register**.
45. Select **Non Conformance** as the Mail Type.
46. At the **Select Addressee** screen, select Tony Simpson as the TO person. Select Joe Fredricks as a CC value, and click OK.
47. Enter a **Subject** value.

Notice in the above screen that the lower half of the screen has a number of fields and option buttons. These mail details screen can be designed to suit any customer requirements.



48. Click the **Down arrow** button on the far right of the above screen to see additional page frames of information in relation to this Non Conformance.



49. Click the Down arrow button again to get to a third page frame.



50. Click the **Save** button on the toolbar and perhaps print a copy of the Non Conformance.



51. Click the **Close** button on the toolbar when done to return to the Master Document Register.

## 2.12 Applying a Filter

The remainder of the Guided Tour is devoted to document retrieval or search and find. The first method that you will use below is a Filter. Filters can be applied throughout QTRAK when viewing the Master Register of documents, printing reports etc.

You are now going to search for items of correspondence that are dated somewhere in March 2002 and are to do with the subject "Contamination".



52. In the Master Document Register, click the large **Filter** button to open the **Build Filter Expression** screen.

Select the field criteria as shown below.

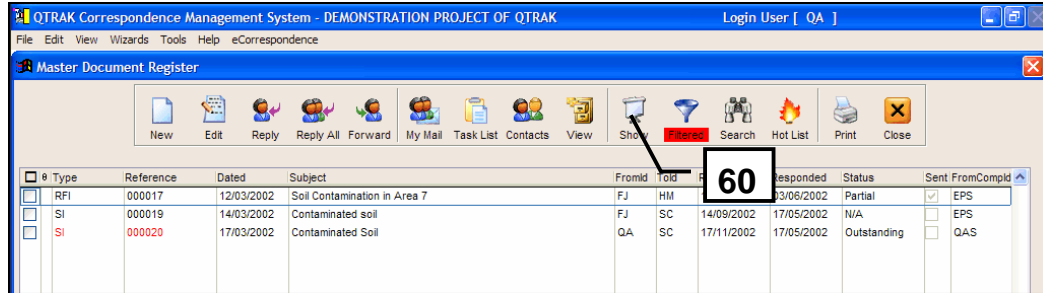
53. On Row 1 of the filter, click the drop down list under Field Name and select **Subject** (the Subject is a field on all QTRAK correspondence).

54. Press Tab and in the Comparison field type "c" for **contains** or select contains from the drop down list (you may need to scroll to find this).

55. Press Tab and type "**Contam**" in the value box (short for contaminated).

56. Now go to the next row and type “d” for dated or select this field from the list.
57. Press Tab and type “g” for greater than and press Tab and enter 28/02/0 2.
58. On the third row setup “Dated less than 01/04/0 2.”
59. Click **OK** to activate the Filter.

Back at the Master Document Register, the Filter button label will have a red background indicating that you are viewing a filtered selection. Note that there are a number of items of correspondence listed of varying mail types.



60. To see just Requests for Information that meet the filter criteria, click the **Show** button and select **Request for Information**.



61. Double click on the item RFI 000017 to open up the details of this RFI. Click on the **Close** button at the RFI screen to return to the above view.

62. Click on the **Show** button and select **+ALL** to see all mail types again that meet the filter condition set above.



63. Click the large **Print** button to generate a printout of this filtered section.



64. Click the **Close Preview** on the Print Preview Toolbar to exit the preview screen.

65. To clear the filter, click on the **Filtered** button again and click the **Clear** button on the Build filter expression window. Click **OK** to return to the Master Document Register.

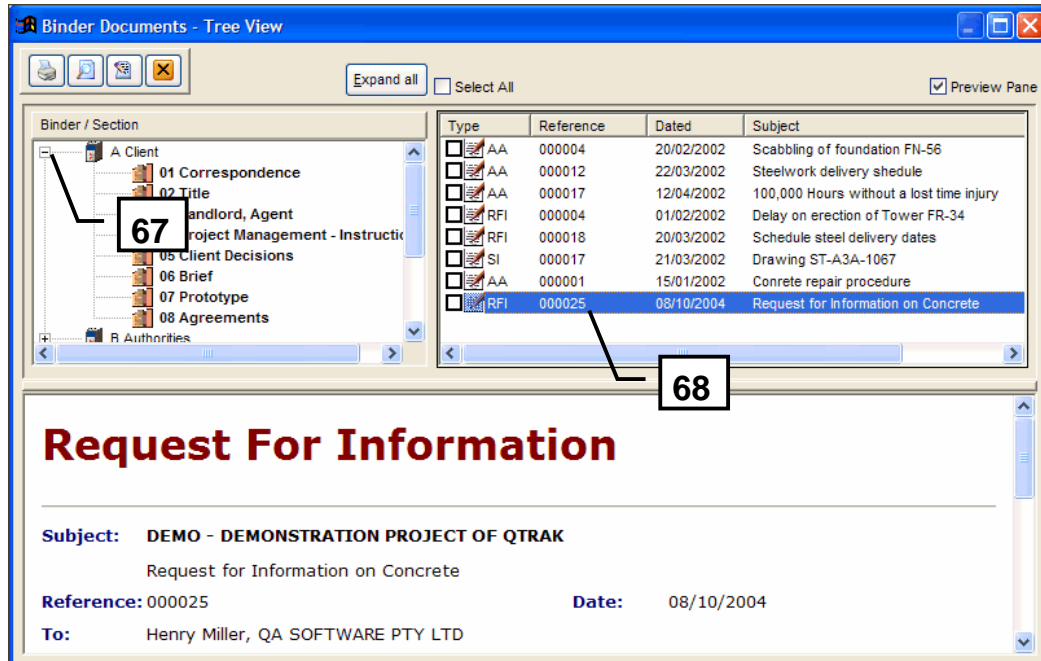
Note that the Filter, Show, and Hot List buttons all work in conjunction with one another. For example to see all Outstanding Faxes with the word concrete in them, you would set up the filter for Subject contains concrete, and then click the Show button and select Faxes and then click the Hot List button and select Outstanding.

## 2.13 View Binders

If you know where the correspondence you are looking for should be filed, then an alternative way of finding it is to view the contents of the appropriate Binder/Section.



66. Click the large **View** button on the Master Document Register and from the menu list that appears, select **Binders - Tree View**.



- 67. Clicking the +/- boxes expands/contracts the selection. Click the + next to **Client** to expand this Binder.
- 68. Then click on the Section **Correspondence** and you will see your RFI neatly filed. Double click on RFI 000025 to open it.



69. Click **Close** at the RFI Edit Mail screen to return to the screen above.



70. Click the **Close** button to exit and return to the Master Document Register.

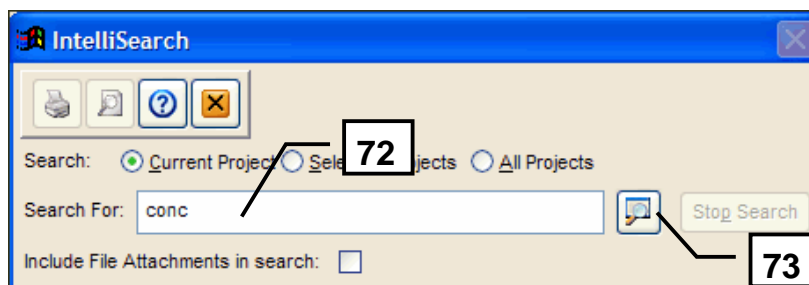
## 2.14 IntelliSearch

The IntelliSearch in QTRAK is a text search similar to the operation of a Internet style search engine. QTRAK will search for one or more words throughout all fields in one or more projects to find Correspondence that meet the search criteria. Including File attachments in the search process is optional.



71. Click the large **Search** button on the Master Document Register.

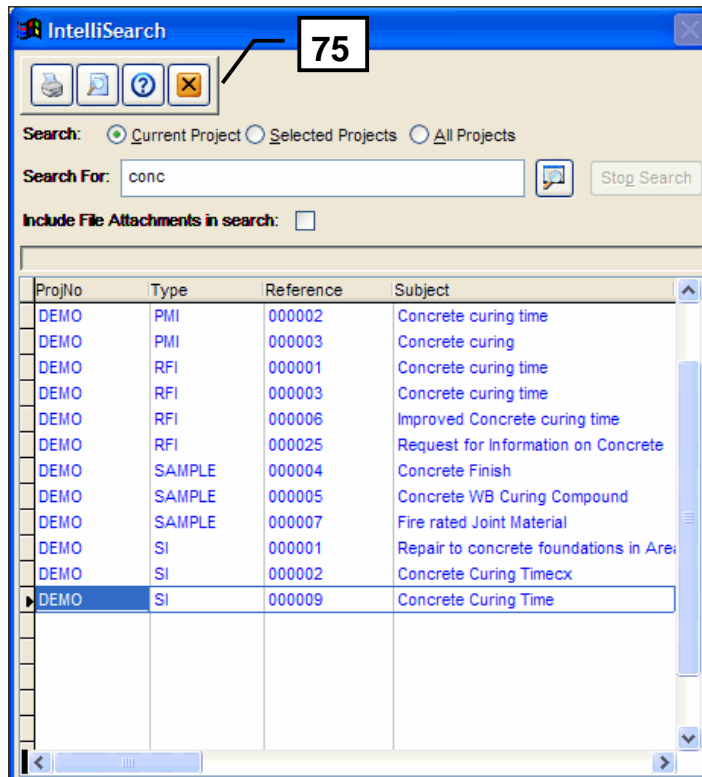
72. Enter **conc** as the search criteria as shown below:



73. Click the **Search** button.

74. Click the **OK** button on the search results window.

All documents in the current project having **conc** anywhere within them will be listed. Any of the documents can be opened by double clicking on them.



75. Click the **Close** button to return to the Master Document Register.

## 2.15 Using the Hot List

The Hot List in QTRAK is used to provide a quick view of all outstanding correspondence, all responses overdue or outstanding, or to view correspondence based on an alternative status such as Pending.



76. Click the large **Hot List** button on the Master Document Register. Select **Outstanding** from the options. You will notice that only correspondence items that are red are displayed.
77. To understand why these items are all outstanding, double click on any item and note the status setting. It will be outstanding. If you change this setting to **Closed Out** for example and close the item, then this piece of correspondence will be removed from this Hot List display.

## 2.16 Other things to try

You have now completed the basic QTRAK Guided Tour. If you would like to explore other features of QTRAK, try the following:

### Standard Reports

78. From the **File** menu, select **Print - Standard reports** (you will need to close the Master Document register if it is open using the large Close button on the Toolbar).
79. Double click on report **02 – By Type and Document Number - including Links**. You should get a screen preview that looks like the one below. Notice this is a register of all correspondence with cross-references (links) printed as indents but in full.

TYPE & REFERENCE	DATED	RESPOND BY	RESPONDED	FROM ID	TO ID	SUBJECT	STATUS
AA-000001	16/01/2002	16/07/2002	16/06/2002	QAS+HM	EPS-FJ	Concrete repair procedure	Partial
AA-000002	16/01/2002	16/07/2002	16/06/2002	QAS-QA	EPS-FJ	Concrete curing time	Cancelled
AA-000007	10/02/2002	10/06/2002	28/06/2002	QAS-QA	EPS-FJ	Concrete curing	Outstanding
RPI-000003	12/01/2002	12/07/2002	03/06/2002	EPS-FJ	QAS+HM	Concrete curing time	Partial
SI-000002	20/01/2002	20/07/2002	17/05/2002	QAS-QA	JN+SC	Concrete Curing Time	Close-out
CAN-000001	28/01/2003	28/07/2003	18/06/2003	HCD-JF	QAS+HM	Concrete curing time	Partial
AA-000003	10/02/2002	10/06/2002	10/04/2002	QAS-QA	EPS-FJ	Procedure PR-23 for cold galvanising	N/A
RPI-000005	03/02/2002	03/06/2002		EPS-FJ	QAS+HM	On site repair procedure for galvanising	Cancelled
SI-000006	11/02/2002	11/06/2002	17/06/2002	QAS-QA	JN+SC	Cold galvanising procedure	Close-out
FAV-000016	17/06/2003	17/06/2003	17/06/2003	QAS+HM	HCD-JF	3 Monthly Program.	Partial
AA-000004	20/02/2002	20/06/2002	20/05/2003	QAS+HM	EPS-FJ	Scabbling of foundation FH-56	Dormant
RPI-000009	11/02/2002	11/06/2002	03/06/2002	HCD-JF	EPS-FJ	Foundation FH-56 incorrect RL	Cancelled
SI-000008	22/02/2002	22/06/2002	17/06/2002	QAS-QA	JN+SC	Foundation FH-56	Outstanding
IC-000012	06/03/2003	06/12/2003		QAS+HM	QAS-QA	Design Development Drawing No. Dtd20 Issue A	Outstanding
AA-000005	20/02/2002	20/06/2002	20/06/2002	QAS-QA	EPS-FJ	Additional set of construction drawings	Close-out
RPI-000010	16/02/2002	16/06/2002	03/06/2002	EPS-FJ	QAS+HM	An additional set of construction drawings	Close-out
AA-000006	22/02/2002	22/06/2002	12/07/2002	QAS+HM	EPS-FJ	Site visit by QA Software chairman	Partial
SI-000013	03/03/2002	03/09/2002	17/06/2002	EPS-FJ	JN+SC	Visit to site by QA Software	N/A
AA-000007	10/02/2002	10/06/2002	28/06/2002	QAS-QA	EPS-FJ	Concrete curing	Outstanding
AA-000002	16/01/2002	16/07/2002	16/06/2002	QAS-QA	EPS-FJ	Concrete curing time	Cancelled
RPI-000006	06/02/2002	06/06/2002	03/06/2002	EPS-FJ	QAS+HM	Improved Concrete curing time	Outstanding

80. Close the preview and click the Cancel button to return to the Main Menu.

### Other Views

81. Return to the Master Document Register using the View menu and sub menu Master Document Register. Click the large **View** button on the MDR toolbar and select the **Distribution View**. This is a very useful view of the Master Register to work with correspondence based on the To, Copies To, and From values. Simply select a company and you will see only correspondence in which the selected company is either the To, From or CC value.

### Mail Type Rules

82. It is possible in QTRAK to define basic rules for each correspondence type provided. To investigate this, use the Tools menu and sub menu Mail Type Rules.

## Mail Statistics

83. At the Dashboard, key mail statistics are displayed for both Incoming and Outgoing Mail for:

- Mail with status outstanding .
- Mail with responses outstanding or overdue.

Click any of these options to be taken to a filtered view of the Master Document Register displaying on the relevant mail items.

## Export Data

84. Data in QTRAK can be exported to MS Excel and other formats using the Wizard's Export Data option.

## 2.17 Where to now?

85. To exit QTRAK, use the **File** menu and sub menu **Exit** option.

86. If you are interested in purchasing QTRAK, the next step is to request a quotation from QA Software. Have ready the number of mail types that you want to incorporate into QTRAK (it is not necessary to have all of them at the beginning as mail types can be added at any time).

87. See also Chapter 3 which has some examples of configured versions of QTRAK.

Listed on the following page is a summary of Issues, Features, and Benefits in relation to the QTRAK System.

## QTRAK – Features and Benefits

ISSUE	FEATURE	BENEFIT
Your company needs to maintain a register of incoming project correspondence.	A simple incoming correspondence register enables items to be registered, cross referenced, and filed for easy action and retrieval.	All incoming correspondence is easily accessible. If scanning is deployed, incoming items can be viewed without using the hardcopy.
Your company needs to manage the generation of outgoing correspondence.	QTRAK includes all your correspondence types. It is a <b>custom fit solution</b> with all items generated in the same way.	Containing only the form types you use, generating outgoing correspondence with QTRAK is simple, fast and saves time and \$\$.
Your company needs a better way of managing the reference numbering of outgoing correspondence.	<b>Automatic referencing</b> of all correspondence in QTRAK is a key feature. A variety of configurations are available.	Auto reference numbering saves time and reduces errors. When complex numbering is required, the benefits are even greater.
Your company needs a system for managing Site Instructions, Requests for information, and other project forms.	QTRAK correspondence types are developed for each client based on their existing templates, from Site Instructions to Non Conformances.	The custom fit QTRAK concept means minimal change management issues, and ready acceptance by users.
Your company needs to better manage the filing of correspondence so that information is easier to find.	<b>Binders and Sections</b> in QTRAK provide a simple means of electronic filing.	Being able to file a document in multiple locations while retaining only a single copy of the document, improves search and retrieval.
Your company needs to be able to better cross reference related documents.	<b>Links</b> are a means of relating one or more documents to the current document. A permanent thread is created between the items.	Linking enables the following of correspondence trails, months after an event took place.
Your company needs to get better control of managing outstanding responses to correspondence.	The QTRAK <b>Hot List</b> enables outstanding correspondence, regardless of type to be viewed with a single click.	Managing responses reduces the delays caused by waiting for answers. The Hot list provides managers with the tools they need.
Your company needs a method of managing internal actions arising from correspondence.	Multiple <b>Actions</b> can be assigned to all correspondence (in and out). Assigned actions appear in the Task List for each user.	Improved response times to issues requiring action by internal staff. Keep an audit trail of who had to do what, and when they did it.
Your company needs to be able to send correspondence electronically, but in a more controlled way than simple email messages.	All outgoing correspondence types in QTRAK, including instructions and RFI's, can be <b>sent directly from QTRAK via email</b> .	Electronic correspondence is stored in a central location, visible by all (with security). Mail is sent fast but is still controlled (and referenced).
Your company needs a simple system for correspondence management that is easy to use, and requires minimal training.	The <b>Master Document Register</b> displays all correspondence types in a single screen. Training times are typically 15 minutes per user.	QTRAK is simple to use so people do use it. This ensures that all correspondence will be captured.



## **Chapter 3 - Appendices**

Appendix A Quick Start Instructions for Installing QTRAK

Appendix B Sample Mail Types

## Appendix A – Quick Start Instructions for Installing QTRAK

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

### A.1 System Requirements

The system requirements for running QTRAK 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 QTRAK 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 QTRAK. 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 QTRAK application.

#### A.2.2 Installing the QTRAK Application

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

If the CD does not auto load:

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

If you downloaded QTRAK from the Internet:

5. Using Windows Explorer double click on the QTRAK.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 800 x 600 pixels.
2. Create a shortcut icon on your desktop (if one was not automatically created during installation) to access the QTRAK.EXE (Located by default in the folder C:\Qasoft\Qtrak\)

### **A.4 Running the QTRAK System**

7. Double click the QTRAK icon on your desktop. (Or use Start | Programs | QA Software | QTRAK).
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 Dashboard. This is the starting point for all QTRAK actions.

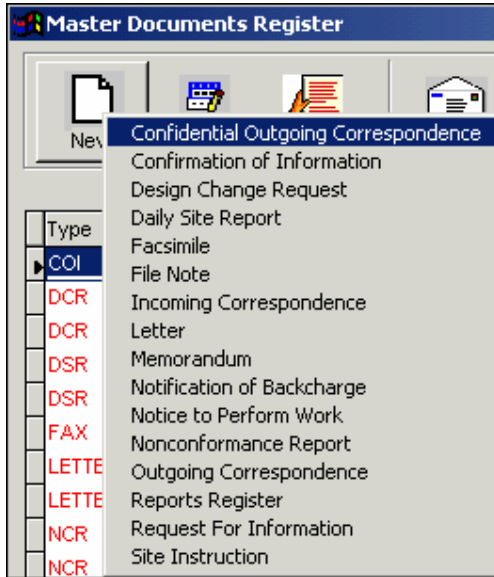
### **A.5 Support**

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](mailto:support@qa-software.com)

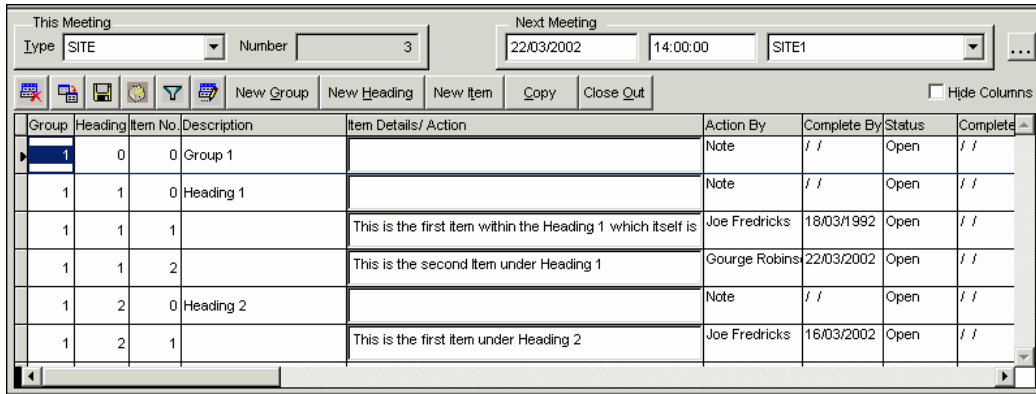
## Appendix B - Sample Mail Types

The flexibility of QTRAK in being able to be Custom fit to a customers requirements is a key feature of the system. On the following pages are some sample screen shots from a variety of custom mail types developed for customers.

### A typical list of correspondence types:



### Sample Minutes of Meeting form:



Note in the above example, Meeting items are auto numbered and each minute can be managed in terms of actions and status.

Also it is possible to copy Open items from one meeting to another.

**Sample multi page frame Site Instruction form:**

Page 1

<b>Work Description</b> <div style="border: 1px solid black; height: 150px; width: 100%;"></div>	<b>Subcontract Package</b> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <b>Sub Contract Ref:</b> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <b>Head Contract Ref:</b> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
---	--

Page 2

<b>SIGNATORIES FOR ISSUE AND RECEIPT OF INSTRUCTION</b>		
<b>Instruction Issued By</b> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<b>Designation</b> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<b>Date</b> <div style="border: 1px solid black; height: 20px; width: 100%; text-align: center;">/ /</div>
<b>Instruction Received By</b> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>		<b>Date</b> <div style="border: 1px solid black; height: 20px; width: 100%; text-align: center;">/ /</div>
<b>NON CONFORMANCE/DEFECT</b>		
NonConformance or Defect Identified <input type="radio"/> Yes <input type="radio"/> No		<input type="checkbox"/> Head Contract Variation
		<input type="checkbox"/> Internal Variation only
		<input type="checkbox"/> Subcontract Variation
		<input type="checkbox"/> Backcharge
<b>Re-Inspected and Cleared By - Inspector</b> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<b>Date</b> <div style="border: 1px solid black; height: 20px; width: 100%; text-align: center;">/ /</div>	

## Sample multi page Non Conformance:

Page 1

Project Details			
Contract No.:	3456	NCR raised by:	Gourge Robinson
Order/Sub. No.:	ASDF	ITP Ref.:	
Specification:	ASDFA	Drawing Ref.:	

Details of Nonconformance	
Nonconforming Details:	Item:
	Type: <input type="checkbox"/> Minor <input type="checkbox"/> Major
	Location / Lot No.:

Page 2

Project Details			
Contract No.:	3456	NCR raised by:	Gourge Robinson
Order/Sub. No.:	ASDF	ITP Ref.:	
Specification:	ASDFA	Drawing Ref.:	

Details of Nonconformance	
Nonconforming Details:	Item:
	Type: <input type="checkbox"/> Minor <input type="checkbox"/> Major
	Location / Lot No.:

**Sample multi page Daily Site Report:**

Page 1

Weather: <input type="text"/>	
<b>Delays</b>	<b>Cumulative</b>
Weather: <input type="text"/>	<input type="text"/>
Industrial: <input type="text"/>	<input type="text"/>
Other: <input type="text"/>	<input type="text"/>
Previous: <input type="text"/>	
This Day: <input type="text"/>	
Total to Date: <input type="text"/>	
Plant/Company: <input type="text"/>	Plant/Hired: <input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Page 2

<b>Company Labour</b>		<b>Sub-Contractors Labour</b>	
Gen Foreperson: <input type="text"/>	<input type="text"/>	FIRM	NO
Foreperson: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TRADE	NO	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Visitors Name</b>	<b>Company and Reason for Visit</b>	<b>Time on Site</b>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Page 3

Instructions Received from Architect or Consultant - (State Source)	Brief Description of Work Performed - Milestones
<input type="text"/>	<input type="text"/>
Drawings Received and Numbered	Assistance Required
<input type="text"/>	<input type="text"/>