Project
Correspondence
Management

QTRAK
Project Correspondence Management System

Find Information with QTRAK
Introduction

QTRAK is a system for managing the large amounts of correspondence, generated on projects.

QTRAK controls the issue and receipt of all project correspondence, whether the item is a letter, a fax, or any other type of project communication such as an Instruction, or Advice note.

Built with a standard core engine, QTRAK is custom fit for each client, to include only the forms, and correspondence types that they use in their business. Within a week of order, new clients receive a powerful, yet easy to use management system, tailor made to fit their organisation, delivering benefits, from the moment of installation.

Gone are the problems associated with reference numbering, and filing of documents. Gone are the problems of staff, creating their own document templates for new projects, reinventing the wheel, time and time again.

With QTRAK, the purpose is not to simplify the communication creation process, although it does this by default, but rather, to manage actions, to ensure that incoming correspondence is responded to in a timely manner. To ensure that responses to outgoing correspondence are expedited, to prevent schedule delays. To have an auditable trail of all communication transactions, and to make information easy to find, throughout the life of the project. This fact is often not traced back, to poor document control.

QTRAK is an integrated information management system for controlling large amounts of project correspondence.

Manage the creation, approval, the sending, and receipt of all outgoing and incoming correspondence types.

Correspondence types include all a customers standard templates for controlling project information such as instructions, advice notes, requests for information, letters . . .

QTRAK supports electronic filing, management of actions/tasks, cross referencing, attachments, and much more.

Ideally deployed across all staff desktops.

What is Correspondence?

QTRAK is a correspondence management system. By correspondence, we mean essentially any sort of project communication, that is addressed to one party, and is from another party.

QTRAK manages just about every information type on a project, other than controlled documents such as drawings. Controlled documents are handled by QA Software's QDMS Document Management Module.

Examples:
- Letters, faxes, memorandums
- Change orders/variations
- Requests for information, Site instructions
- Non-conformance reports
- Engineering change requests
- Architects instructions
- Emails, File Notes
- Record of phone conversations
- Punch lists/defects notices
- Meeting agendas/minutes of meeting
- Design reviews/design instructions
The Purpose of QTRAK

Many users believe the purpose of QTRAK, is to simplify the generating of outgoing correspondence such as site instructions. Certainly creating correspondence in QTRAK is made easy with auto reference numbering, with easy access to an address book, and with no need to worry about document formatting – you just fill in the boxes. But, this is not the purpose of QTRAK – it is just a by product of it’s reason for being.

An important by product by all means, since if users don’t find creating correspondence in QTRAK, easier than the way they did previously – (normally by hand, or in an Microsoft office template), then they won’t want to use the system. In turn this means that not all project information will be captured – a common failing with our competitor’s products.

The purpose of QTRAK however, is to manage correspondence. This means tracking responses to outgoing correspondence, to reduced communication delays. It means tracking responses to incoming correspondence, to ensure your team is actioning items as they arise.

Managing Correspondence also means cross referencing, and filing, so information can be found easily, throughout the life of the project.

- Recording of all incoming and outgoing correspondence via a Master Document Register.
- Generation of outgoing correspondence using custom fit form types.
- Sending of outgoing correspondence via email, fax or print direct from within QTRAK.
- Linking of documents and electronic filing ensures fast search and simple retrieval of any project information.
- Assignment of multiple actions to incoming correspondence which then appear in users Task lists.
- Daily expediting of responses required to outgoing correspondence and actions on incoming correspondence.
- Powerful report generation for correspondence registers, hot lists, responses overdue and actions pending.
- Streamline Issue and Claims management.
- Elimination of the paperwork shuffle.

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Site Instruction
DEMONSTRATION PROJECT OF QTRAK

TO: Simon Campbell J. K. NEDA ENGINEERING
FROM: Joe Box, QA SOFTWARE PTY LTD
DATE: 12 February 2002
TOTAL PAGE(S): 6

RE: 000007
SUBJECT: Work on the RD0 on 17-2-97

- To comply with Clause 2a of the Subcontract Agreement the following work is to be completed in accordance with our current construction programme.
- The following non-conforming work is to be rectified immediately in accordance with Clause 5.
- You are hereby instructed to carry out the following work:
- You are advised of the following for your information.

MESSAGE
We have considered of your request to work on the 17-2-97 with a small crew.
Features and Benefits

QTRAK, with its simple to use interface and custom fit philosophy, becomes a part of your project management suite of applications. Distributed on the desk top of all team members, some of the benefits of using QTRAK include:

Automatic reference numbering – no more maintaining spreadsheets, or manual registers, to determine the next reference number to use for that letter!

Electronic filing, forcing users to allocate correspondence to one or more file locations, means that the filing of correspondence becomes routine, and simple to do.

Managing Actions and responses to correspondence, is a significant benefit of QTRAK. Imaging walking into your next meeting with the project architect, and having to hand, a list of all overdue responses to requests for information you have sent them.

The custom fit philosophy of QTRAK means the system is easy to implement and use, and is readily accepted by project staff.

By incorporating a customer's standard forms, QTRAK promotes a standard way of doing business on projects.

Force users to fill in key information fields while generating correspondence.

Linking of related correspondence items and electronic filing means team members can focus on the issues rather than the hunt for information and paper.

The QTRAK Hot List makes expediting of outstanding responses and actions simple, a definite plus in keeping the information flow moving.

Sending standard correspondence types by email can speed up internal and intercompany communications, reducing response times.

Advanced methods for querying the QTRAK database means fast and reliable searching for information.

Plus a statistical analysis, showing they are consistently taking 4 working days longer than agreed, to respond to RFI's.

This kind of information highlights problem areas to management simply and effectively.

Being able to search for and locate correspondence quickly and easily is also a very significant benefit of QTRAK.
Outgoing Correspondence

To create an outgoing correspondence item, simply click the New button, and select the type of correspondence to generate. The list displayed will only contain the correspondence types that are utilised in the user’s company.

The user is then prompted to select the TO, the CC, and the FROM Values for the correspondence. Coupled with the DATE and the SUBJECT, these values make up the mail header, which is common to all QTRAK Correspondence Types.

The user then completes the mail details, which will contain all the other elements of the correspondence type necessary, to produce a complete document. For example, on a Site Instruction, the user may need to select from a number of contract conditions, or enter an estimated value.

The ability to custom fit the QTRAK forms to a clients existing documentation, means that not only is correspondence easy to generate, and will look the same every time, but also, since every element is in fact a database field, this data can be analysed. For example, you could print a list of non conformance raised, that have arisen due to poor document control.

- Click New and select from a customised list, the correspondence type to generate, a Request for Information for example.
- Select the addressee and any carbon copy values from the address book which opens automatically.
- The top third of the screen is called the mail header and is consistent for all mail types.
- The mail header has key fields such as the Date and Subject which must be completed by the user.
- The lower two thirds of the screen is always customised to suit the form types of each customer. It captures electronically, all the data required to complete the form.
- A sequential reference number is automatically allocated at the moment of saving.
- The correspondence item can be emailed, faxed or printed.
- The completed correspondence item is added to the Master Document Register.
Incoming Correspondence

Outgoing correspondence is the easier side of the correspondence equation to solve, since you are the initiator of outgoing correspondence. Incoming correspondence can be more difficult to find an elegant solution for, since it can come from a variety of sources, and in many formats.

In QTRAK, there are a number of options for Incoming Correspondence. At the most simplistic level, simply register hard copies of incoming correspondence. The minimum information to capture is the TO and FROM Values, as well as a SUBJECT, a RECEIVED DATE, and a RESPOND BY DATE if applicable. A few key words will also help document retrieval later.

The next level up is to scan incoming correspondence. This provides better long term storage, and makes the incoming item available to all users, without recourse to the hard copy.

For correspondence received by email, QTRAK has an eCorrespondence module to facilitate importing these mail items directly into the Master Document Register, including file attachments with auto reference numbering on route.

| • Incoming correspondence originates from many parties and in a variety of formats. |
| • Simply register all incoming items in the Master Document Register, capturing as much information as possible in standard fields. |
| • Scan hardcopy incoming items to have an image of the item available from within QTRAK. |
| • Import email using the eCorrespondence module. |
| • QTRAK allocates an internal reference number to all incoming items. |
| • Define rules to enable QTRAK to auto register incoming emails and electronic faxes. |
| • While reviewing incoming items, assign actions to project staff. |
| • Respond to, or forward incoming items with auto linking to the original. |
The Master Document Register

The Master Document Register or MDR in QTRAK is the starting point for nearly all day to day actions. It is a unique interface displaying by default, ALL the project correspondence in a simple to understand spreadsheet style interface.

Compare this with the complex interfaces of our competition, where each type of correspondence has to be viewed separate from all others. The feedback from QTRAK users, is that the Master Document Register Interface, is one of the most attractive features of the system, when compared to the “hard to use” alternatives.

We believe that simplicity and ease of use, are the two KEY elements for a successful system of this nature. If a system is too hard to use, staff will tend to try and avoid using it when under stress.

- The master document register (MDR) displays all correspondence types in a single spreadsheet style.
- 90% of all QTRAK actions can take place directly from the master document register toolbar making the system very easy to use.
- The address book and electronic filing are a single click away from the MDR.
- The MDR toolbar includes an internet style search engine to make document retrieval fast and simple when searching through hundreds or thousands of document records.
- Drill down to a particular type of correspondence with a click of the Show button and then activate the hot list for outstanding items.
- The MDR filter enables structured SQL searches for date based, or other information.
- Re-sort the displayed information and generate a what you see is what you get (WSYWIG) report directly from the MDR.
- Customise the MDR per user to build a personal view of the database.
Electronic Filing

QTRAK supports two methods of electronic filing: Binders and Sections and Multi Level filing. Both methods are far superior to the limitations of the Windows Folder.

In QTRAK correspondence items can be “filed”, in as many locations as required, without making duplicate copies – something that is highly desirable and efficient, but not possible with the standard concept of folders. Thus a letter to the client may be filed under correspondence to the client, but also filed under Claim number 26. At all times though, there is only ever a single copy of the letter in QTRAK.

Binders and Sections are a two level filing system, that is adequate for all but very large projects, and even then, simplicity is the rule, if accurate filing is to be achieved.

Viewing, and even printing the contents of the Binder/Section, is a single click away from the Master Document Register. This is the equivalent in the paper world, of getting up from your desk, and locating a lever arch file to review it’s contents.

- Concept of Binders and Sections to simulate the paper world.
- Users design their own filing structure for the project, or use a standard company template.
- All correspondence is easily filed in one or more locations without making duplicate copies.
- Binders are the equivalent of draws in a filing cabinet.
- Sections are the equivalent of separators within the draws of the filing cabinet.
- Create a binder called Issues for issue management. Create a binder called Safety to manage safety issues.
- Simple to view and/or print the contents of a Binder/Section combination.
- Move beyond the limitations of the windows folder.
Actions and Responses

Managing the responses to both incoming and outgoing correspondence is a key feature of the QTRAK System.

Responses to incoming correspondence are generally managed by actions. As an incoming item of correspondence is registered, one or more actions can be assigned to your team members.

Assigned actions appear in the Task list of each user, which is available from the Master Document Register. When viewing Actions, the user can open the related documents with a simple mouse click. They then perform the action, note what they did, and the completion date and status are captured.

Responses to outgoing correspondence are normally controlled via the Respond By and Responded fields. Overdue or outstanding responses, can be listed from the Hot List.

• Assign one or more actions to team members against correspondence item in QTRAK.
• Assigned actions appear in users task list, available from the MDR.
• Manage actions you have assigned via the Action Register. Follow up incomplete actions easily.
• Use the Hot list to display correspondence items via their Status.
• Use the Respond by and Responded fields to manage responses outstanding and responses overdue.
• Print the Hot list simply from the Master Document Register to get a list of say RFIs awaiting response from Houston Contracting.

Standard Reporting

Generating correspondence is only half the story in QTRAK. Getting information out of the system is equally important. For example, reporting to management, on the average turn around time in the previous month, of incoming technical queries.

Reports can be generated in two ways in QTRAK. Firstly when viewing data, the master document register for example, clicking print will generate a “what you see is what you get” style report.

The second method is to select from one of a series, of standard reports that are supplied with QTRAK. These include simple registers for each correspondence type, through to more complex registers, displaying correspondence with their cross references, and filtered for perhaps specific key words.

QTRAK Reports can be output to Print, Microsoft Excel or to a PDF file. Sending reports electronically to other parties is hence just a couple of clicks away.

• Standard register style reports are available from File\Print Standard Reports.
• Summary and Detailed options available for register reports. Detailed reports include all the detailed text of each item in a landscape register style.
• Correspondence registers with full details of cross referenced items takes reporting to new levels.
• Print reports to Excel or PDF for easy emailing to other parties.
• Email correspondence items direct from the correspondence form.
Summary

In summary, we believe that QTRAK is the most elegant solution, for complete project correspondence management, commercially available.

Two features setting QTRAK apart, are firstly; the custom fit philosophy, which ensures ease of use, rapid implementation, and ready acceptance by users.

Secondly the Master document register interface, which means that all project correspondence, both incoming and outgoing, can be viewed via a single register, regardless of correspondence type. This is even though each correspondence type is in fact, stored in a separate database table.

Many of Australia’s largest projects are taking advantage of QTRAK today.

Why not install and evaluate a real working version of QTRAK, by clicking the link on your screen?

- Powerful yet easy to use correspondence management.
- Deploying QTRAK on the work stations of all staff members ensures all project correspondence is captured centrally.
- Promotes a standard method of doing business on projects.
- Generation of outgoing correspondence
- Management of incoming correspondence
- Cross referencing via links.
- Attach files from other applications.
- Electronic filing via binders and sections.
- Management of actions and responses
- Paperless office vision

For more information contact:

QA software
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