



**QA software**

Project Management the smart way



# Project Document Control



## QDMS

Project Document  
Control System



Take Control with QDMS

## Introducing QDMS

The QDMS Document Management System was the first product developed by QA Software back in 1995, and remains today, one of our most popular systems.

Based on a **Master Document Register**, which stores the latest version only of documents as they are received, QDMS uses a transmittal engine, to control the distribution of documents.

The system maintains a **Recipient Document Register** or **Distribution Matrix** automatically. If revised documents are received, users are prompted to send the latest revision, to recipients who have previously received the documents.

If QDMS has a single reason for being, it is to ensure that recipients are kept up to date, with the latest revision of documents. Working on a project with the wrong revision, is one of the most common reasons for rework on sites, and costs real money. This fact is often not traced back, to poor document control.



- QDMS is Australia's **most popular document management system** for projects.
- A Master Document Register to track the **latest revision of documents**.
- Proprietary **transmittal generation engine** to create both simple and complex transmittals via a single process.
- Maintains an **auditable history** of when documents were received and issued.
- **Ensures recipients are kept up to date** with the latest revision of documents when documents are revised.
- **Integrated Viewer** for viewing CAD files and redlining for collaborative reviews.
- eTransmittals to **distribute documents electronically** by transmittal using email.

## What is a Controlled Document?

QDMS is a system for managing the distribution, of controlled documents under transmittal. A controlled document is one that is subject to change control throughout its life cycle. A typical example is an engineering drawing, which often undergoes many changes between the time it is first issued, and the time when the work it depicts is completed on site.

The need for a system to manage the distribution of controlled documents arises, when both the number of such documents, and the number of people who receive one or more them, is large.

Say you have a project with one hundred drawings. There are five people in your own company, and five external companies involved with the project. If each drawing gets revised three times, then you have a potential three thousand transactions to manage if every document, gets issued to every person.

As a document is revised, how can you be sure that everyone who has previously received it, is sent the latest revision? The answer is to use QDMS as QDMS **ensures recipients are kept up to date** with the latest revision of documents. This reduces the risk of people using the wrong version of documents.

### What is the purpose of QDMS?

If the purpose of QDMS had to be encapsulated in a single sentence, it would be “to ensure that recipients are kept up to date, with the latest revision of documents”. The reason for this primary goal, is that working with the wrong revision of documents costs real money.

As part of building QDMS to achieve this purpose, the system builds and maintains, a completely searchable history of who got what, when, and why. The most common questions in document control are, “When did we send revision one of document X to Joe, he is saying he never received it”. Or, “What documents have we sent to Houston Contracting?”. Answers to these questions in QDMS, can be obtained from a single screen.

Tracking responses to document issues, such as drawing reviews or approvals, is also an important purpose of QDMS, as is the tracking of transmittal acknowledgements.

Transmittal History by Recipient					Report No : Grid Report		Page : 1	
DEMONSTRATION PROJECT OF QDMS					Run Date : Friday, 08 October 04		Time : 10:55:43	
FILTER : COMPANYID does not contain BIG, ignoring case								
Companyid Company			Id	Firstname	Lastname			
EPS	EUROPEAN PASSENGER SERVICE		AH	A.	HINKLEY			
Companyid	Company	DocumentNo	Rev Sent	Sts Sent	Title	Trmtl No	Sent	
EPS	AH	AB-152	1	-	ATTRIBUTES DEMO DRAWING	1	18/06/03	
EPS	AH	DO-157	1	-	DOOR & WINDOW SCHEDULE - GROUND FLOOR	1	18/06/03	
EPS	AH	EX-162	0	-	EXTERNAL WALKWAYS DETAILS - SHEET 2	1	18/06/03	
EPS	AH	FO-157	0	3	FOYER DETAILS	1	18/06/03	
EPS	AH	HV-170	0	-	HVAC LAYOUT FIRST FLOOR	1	18/06/03	
Companyid Company			Id	Firstname	Lastname			
HCC	HOUSTON CONTRACTING CO LTD		BV	BRIAN	VASSILIEFF			
Companyid	Company	DocumentNo	Rev Sent	Sts Sent	Title	Trmtl No	Sent	
HCC	BV	CA-154	2	-	FLASH GUN DXF FORMAT	3	28/06/03	
HCC	BV	EQ-180	1	-	3D - Site Details	3	28/06/03	
HCC	BV	FI-163	0	-	FIRE SERVICE MECHANICAL FLOW DIAGRAM	3	28/06/03	
HCC	BV	GR-198	0	-	GROUND FLOOR PLAN	3	28/06/03	
HCC	BV	IN-174	0	-	INTERFACE SCHEDULE	3	28/06/03	
HCC	BV	MA-178	0	3	MAIN BUILDING - DETAILS	3	28/06/03	

- Maintain a register of the **current revision** of all documents.
- Manage the **distribution of documents** via transmittal using both traditional paper based documents or eTransmittals.
- Build an audit trail of who received what document, at what revision, when and why.
- As new and revised documents are received, maintain an **auditable document history** of received dates for contractual purposes.
- Ensure recipients are issued the latest revisions of documents that they have previously received at an earlier revision. This is the most important feature of QDMS.
- Manage **responses to transmittals** such as drawing approvals.
- Manage the **shop drawings** submittal process.
- Manage **transmittal acknowledgements**.
- Enable viewing of documents on screen plus **red lining capabilities** for document reviews.

### Features and Benefits of QDMS

QDMS is a deceptively simple looking program, and deliberately so. Document management should be easy, after all it is not rocket science!

While we are proud of the apparent simplicity of QDMS, there is a depth to QDMS to satisfy the most demanding of users. With perhaps 500 million documents transmitted by QDMS, you can be sure the transmittal engine in QDMS is a pleasure to use.

One of the key benefits of QDMS, is the ability to be able to leave document control to clerical staff, rather than have to use the valuable time of more senior engineers, or hire expensive specialist operators, on what is essentially a very straight forward task. One of the most common complaints against our competitor’s systems, is their requirement for specialist operators. They’ve made it all more complex than it needs to be.

QDMS will distribute documents effortlessly day after day, and more importantly, ensure that all parties on the project are kept up to date, with revised versions of documents as they are received.

## Project Document Control System

- Ensuring **recipients are kept up to date** with the latest revision of documents means reduced re-work, and hence cost savings.
- Management of **responses to document issues** means drawing approvals are more likely to be achieved within contract turn around times.
- **Efficiencies and cost savings** relating to electronic document distribution using eTransmittals.
- Enables document management to be done effectively and accurately without a requirement for a specialist user. (A stark difference between QDMS and rest!)
- **Simple to use** and easy to implement means that project document control can be started effectively from Day 1 on a project. One less thing to worry about!
- Generation of standard reports such as **who got what when**, acknowledgements pending, responses outstanding, and pending transmittals is made easy enough for even the most occasional user.

## Work Flow

One of the things that makes QDMS so successful, is the work flow, or business process that the system is based on.

We begin with a **master document register**, through which all documents, (both new and revised), must be processed. The **Master Document Register** at any instant, stores only the latest revision of all documents.

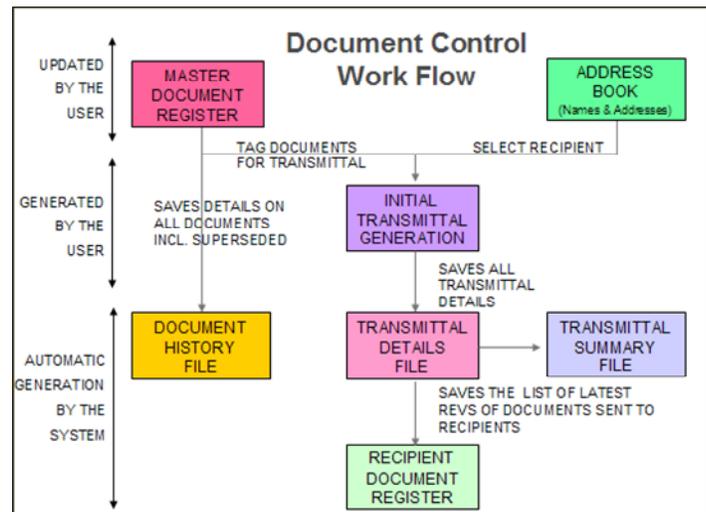
Then we add an address book, which is simply names and addresses, of people and companies on the project. We term these Recipients.

Documents are issued for the first time, by selecting them from the **master document register**, (thus ensuring you can only issue the current revision), and generating one or more transmittals, to one or more recipients.

Transmittal data is saved in an auditable history, and at the same time a **Recipient document Register** is maintained. The **Recipient Document Register** stores the latest revision of each document, sent to each recipient.

Most people would recognise the **recipient document register**, as a **distribution matrix**. The beauty in QDMS is that there is no requirement, to set up any kind of **distribution matrix**. The system builds this for you as you generate transmittals.

So simple, yet we believe this process is unique to QDMS. Certainly our clients tell us it is.



- Both new and revised documents are registered in the **master document register (MDR)**.
- The MDR contains only the **latest revision** of all documents
- The **address book** stores the names, addresses, and transmittal defaults for all recipients.
- Select documents to transmit, the recipients to transmit to, and **generate transmittals**.
- QDMS maintains an **auditable history** of all transmittals generated.
- QDMS also creates a **recipient document register** or distribution automatically.
- The recipient document register stores the latest revision of documents sent to each recipient.

### Document Registration

All documents in QDMS must be registered into the **Master Document Register**, (MDR for short). The MDR retains the latest revision of all documents. Previous revisions are archived to a document history table automatically. Separating the latest revision from previous revisions, is a key feature of the QDMS design.

The mandatory attributes of a document in QDMS are, the Document Number, the Revision, the Status, and the Title. Other attributes can be made compulsory on request. Most users would also capture, the name of the Company the document is from, the Transmittal received number, if the document is external, the Date Received, the Discipline, and the document type. There are many other optional attributes in QDMS such as Zones, Packages, Categories, and WBS codes.

Tag	Documentno	Rev	Sts	Title	Fromcompid	Trmtrcvd	Received	Revision	Discipline	Type	Toclient	Forre
0	AB-111	2	2	FLASH GUN - DWG FORMAT	HCC		11	11			11	11
0	AB-152	5	-	ATTRIBUTES DEMO DRAWING	HCC		02/06/03	11	2		11	11
0	AB-999	3	3	INTERNET CALCULATION EXCEL WORKSHEET	EPS		25/05/03	11	5		11	11
0	AN-123	0	-	FLOOR DESIGN	SHS		21/03/03	11	1		11	11
T	CA-154	2	-	FLASH GUN DXF FORMAT	SHS		25/05/03	11	1		11	11
0	CA-155	3	3	DEMO TXT FILE	QAS	007007	30/04/99	11	7		11	11
0	CI-156	0	6	WORD 97 DEMO FILE	SHS		02/06/03	11	1		11	11
0	DO-157	1	-	DOOR & WINDOW SCHEDULE - GROUND FLOOR	JKN		13/04/03	11	4		11	11
0	DO-158	0	-	STAIR DETAIL	JKN		21/03/03	11	4		11	11
0	EF-159	2	-	SEXTANT	EPS	002002	25/05/03	11	2		11	11
T	EQ-160	1	-	3D - Site Details	JKN	TR003	25/05/03	11	3		11	11
0	EX-161	0	-	EXTERNAL WALKWAYS DETAILS - SHEET 1	EPS	006006	21/03/03	11	3		11	11
0	EX-162	0	-	EXTERNAL WALKWAYS DETAILS - SHEET 3	EPS		21/03/03	11			11	11
T	FI-163	1	-	FIRE SERVICE MECHANICAL FLOW DIAGRAM	EPS		11	11	2		11	11
0	FI-164	0	-	FLASHING DETAILS - SHEET 1	EPS		11	11	2		11	11

*The spreadsheet style layout of the master document register is extremely popular with users, since they can see all their documents at once. This layout is fully customisable on a per user basis.*

### Generating Transmittals

The Transmittal generation process in QDMS, is one of the systems most powerful features. Documents for transmittal are selected from the **Master document register**, ensuring that only the latest revisions can be selected. Recipients are either selected from a drop down list, or tagged if the documents are to be sent to multiple recipients.

The remainder of the transmittal process is just filling in boxes, such as the reason for issue, the method of delivery, and the respond by date.

One of the most important boxes is the re-send revisions flag. When ticked, which is the default position, this tells QDMS to build a distribution, based on the transmittal information.

Should any of the documents being transmitted ever get revised, pending transmittals for recipients, who have received these documents previously, will be created automatically. This ensures, that keeping recipients up to date, with the latest revision of documents, becomes routine.

- Transmittals are used to **control the issue of documents** to recipients.
- The transmittal engine in QDMS has a **high degree of functionality** for issue of documents to:
  - Single recipients
  - Multiple recipients
  - Circulation lists
  - Package distributions
- **Free form transmittals** are also supported.

## Project Document Control System

You may have noticed that there is no need to create any sort distribution in QDMS, before you can start transmitting documents. Simply select the drawings and recipients, and generate transmittals while QDMS builds the distribution for you. We cannot overstate the beauty of this practical, and very simple process. This is one of the major differences between QDMS, and its would be competitors.

- To generate a transmittal of documents to a recipient for the first time, simply select the documents from the MDR and select the recipient from the address book.
- For a transmittal to **multiple recipients**, selected as many recipients as required.
- Use standard messages, **reasons for issue**, methods of delivery, response messages, and more.
- Transmittals are **automatically numbered** and saved in an auditable transmittal history.

## Revised Documents

It is a fact of life on projects that documents will get revised. Ensuring revised documents are distributed to those who need them, is a key feature of QDMS.

Revised documents are processed through the **master document register**, with the previous revision being automatically archived, to the **Document History file**. The document history file is a complete and auditable history, of all revisions of all documents.

The beauty of the document history file, is that users don't have to concern themselves with how it gets built and maintained. This function is completely automated. Users just continue to process new and revised documents, through the master document register, and QDMS takes care of the rest.

- Poor management of revisions is one of the largest causes of rework on projects.
- Poor management of revised documents costs real money and affects project margins.
- QDMS ensures that revised documents are issued to recipients who have received the previous version.
- Revised documents are added to the master document register in the same way that new documents are processed. i.e. via the MDR.
- The previous revision of a document moves to the **document history file** automatically when the latest revision is received.
- The document history file is an **auditable record** of every revision of every document.
- The Document history file is **maintained automatically**.

### Pending Transmittals

Pending Transmittals are in a sense, the purpose of QDMS. It is here that we see a list of recipients, that have superseded documents. Such a simple statement, but ask yourself if this information is readily available to you with the current methods you use for document management. How do you currently know which of your recipients have superseded documents?

Pending transmittals are created automatically in QDMS, by a continual comparison between, the latest revision of documents, that have been sent to each recipient, and the current revision in the **master document register**.

Once pending transmittal data has been created, it can be cleared only by either, sending each recipient the latest versions of documents, for which they currently have superseded copies OR, by manually adjusting the distribution, in the **recipient document register**.

Companyid	Company	Id	Title	First Name	Last Name	Address1	Address2	Postal Address	Pc
EFS	EUROPEAN PASSENGER SERVICE	AH	Mr. A.	HINKLEY	74-78 SWINGBRIDGE				
JKN	J. K. NEDA ENGINEERING	C.J	Mr. CHRIS	JOHNSON	1 LISRON ROAD				
QAS	QA SOFTWARE	SJ	Mr. STEVE	JOUSTRA	3/13 Acadia Street ( P.BYRON BAY	1906			
SHS	SHELL SOFTWARE	JB	Mr. JOE	BLUE	50, MAIN ROAD				Cl

Companyid	Companyid	Id	Documentno	RevSent	RevNow	StsSent	StsNow	TrmtlNo	Sent	Title	Revis
JKN	JKN	CJ	CA-155	2	3	-	3	4	10/07/03	DEMO TXT FILE	//
JKN	JKN	CJ	FL-163	0	1	-	-	4	10/07/03	FIRE SERVICE MECHANICAL FLOW DIAGRAM	//
JKN	JKN	CJ	GR-168	0	1	-	-	4	10/07/03	GROUND FLOOR PLAN	//

While users do not have to worry about *building a distribution* in QDMS, as this is automated, they do have the power to *adjust* the distribution, if say a recipient no longer needs to receive revisions of one, or more documents.

Checking your pending transmittals regularly, is part of the standard operating procedure for QDMS.

- If **re-send revisions** is ticked when transmitting documents, QDMS updates the recipient document register which can be thought of as the distribution.
- The recipient document register stores the **latest revision of each document sent to each recipient**.
- By comparing the latest revision sent to recipients with the latest revision in the master document register, **QDMS creates pending transmittals** where the values differ.

- Pending transmittals is one of the best features of QDMS as it shows all recipients that have superseded copies of documents.
- The transmit revised documents option selects documents for issue from transmittals pending, thus ensuring that it is **simple to keep recipients up to date with the latest revision**.
- The transmittal information is saved as normal in the transmittal history.
- The recipient document register is updated with the fact the recipient now has the latest revision.

### Transmittal History

The transmittal history in QDMS, which is updated each time a transmittal is generated, is the equivalent of a filing cabinet of hard copy transmittals in the paper world.

The difference is, that by storing this data in a database, we can search for exactly what we want, without having to go laboriously through each transmittal.

Say for example you wanted to know who has been sent revision zero, of a document called X. With a drawer of hardcopy transmittals, it would be necessary to check every transmittal generated for this information – a time consuming exercise.

In QDMS, you would view the transmittal history file. Sort the history by document number, and locate document X in the top half of the screen. The lower half of the screen will now display the recipients, who have received this document.

Tag	DocumentNo	Rev	Sts	StsRcvd	Title	FromcompId	TrmtRcvd	Received
AB-152	5	-	-	-	ATTRIBUTES DEMO DRAWING	HCC		02/06/03
CA-154	2	-	-	-	FLASH GUN DXF FORMAT	SHS		25/05/03
CA-155	3	3	-	-	DEMO TXT FILE	QAS	007007	30/04/99
DO-157	1	-	-	-	DOOR & WINDOW SCHEDULE - GROUND FLOOR	JKN		13/04/03
EQ-160	1	-	-	-	3D - Site Details	JKN	TR003	25/05/03

CompanyId	Id	DocumentNo	Rev/Sent	StsSent	Title	Trmtl No	Sent	RspnReqd	RspnRcvd	Statu
SHS	JB	CA-154	2	-	FLASH GUN DXF FORMAT	2	18/06/03	21/07/03	05/07/03	B
HCC	BV	CA-154	2	-	FLASH GUN DXF FORMAT	3	28/06/03	25/07/03	12/12/04	
BIGPOND	JF	CA-154	2	-	FLASH GUN DXF FORMAT	11	07/10/04	/ /	/ /	

Change your view to **by recipient name**, and the top half of the screen will now display your address book. Locate a recipient, and the lower half of the screen will display the documents that have been sent to that recipient. This is powerful information at your finger tips and fully auditable.

- The transmittal history is built automatically when transmittals are saved.
- Equivalent in the paper world of a draw full of hard copy transmittals.
- There are three powerful transmittal history views.
- **By transmittal number** displays a simple transmittal register in the top half of the screen with the documents on each transmittal displayed in the bottom half.
- **By recipient** displays the address book in the top half of the screen with the documents sent to each recipient in the lower half.
- **By document** displays the master document register in the top half of the screen and the recipients that have received each document in the lower half.
- The transmittal history is an auditable file. Information cannot be changed here.

### Document History

As revised documents are received, QDMS automates the manual process of stamping documents “superseded”, and storing them separately out of the way. The location where superseded copies of documents are stored in QDMS, is called the **Document History File**.

This is an auditable record of when all revisions, of all documents, both internal and external, were revised, or received.

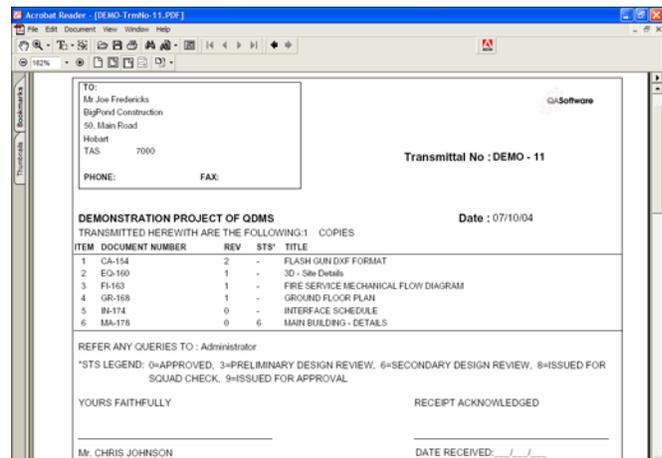
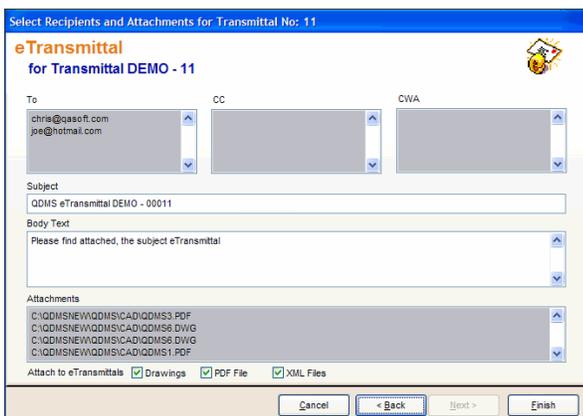
- The **transmittal history** is where to find out when documents were sent to recipients.
- The **document history** file is where to find out when a revision of a document was received or revised.
- The document history file stores both internal and external documents.
- The document history file is built automatically as revised documents are processed through the master document register.
- The document history file is equivalent to a filing cabinet where superseded copies of documents are stored.
- The document history file is an auditable history that can be used for contractual purposes.
- Information in the document history file can be sorted and filtered. WYSIWIG reports can be generated directly from the screen.

### eTransmittals

**e-Transmittals** in QDMS are a means to send documents to recipients, electronically via email.

The eTransmittal process involves the creation of an PDF or HTML version of the standard transmittal. It also includes the zipping up of the actual electronic copies of each document, if these have been attached to the document entries in QDMS. This all happens automatically if the eTransmittal option is chosen, after transmittal generation.

The resulting zip file will contain the documents, the PDF or HTML transmittal, plus an XML version of the transmittal for import into the recipients document management system. The zip file is automatically processed into the outbox of your email client, and sent when you are next on line.

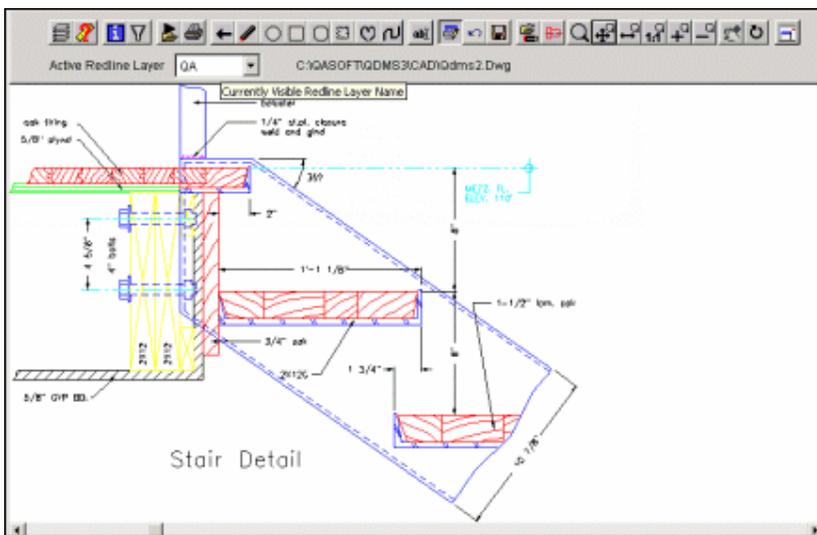


### Viewing and Redlining Documents

QDMS is designed as primarily a tracking system, to manage the distribution of controlled documents in a project environment. Cad files, or any other electronic files, can be attached to the document entries in QDMS, and this enables them to be viewed from within QDMS, using the Integrated Viewer QVIEW.

QVIEW views more than 150 of the most popular file formats, including both Autocad and Microstation files. QVIEW even supports file format conversions.

Redlining is a key part of the QVIEW technology. Any QDMS user can red line a document with a layer being created, that only they can edit or change. Users can view the redlining of other team members using the **common layer** view. This means the red lining process is controlled, and becomes an ideal tool for collaborative reviews of documents, or drawings.



- QVIEW reads over 150 file formats, including AutoCad and Microstation.
- QVIEW is simple to use for staff not familiar with CAD systems.
- Print what you see on the screen with the QVIEW print option after first zooming in for a blow up of a particular detail.
- Red line documents in a controlled environment.
- Red line layers are stored on a per user basis.
- Red line layers can only be changed / edited by the original user.
- All red line layers can be viewed via a common layer view.

# QDMS

## Information Management Solutions for the Construction Industry

### Project Document Control System

#### Summary

In summary, QDMS is a system that is focused on controlling the issue of documents and drawings.

We believe QDMS is a best of class product. Our competitors try to be all things to all people, and have systems that are either too hard to use, or unnecessarily complex, requiring sophisticated and expensive specialist users, for what is essentially a simple task. Often document control is for them just an after thought.

QDMS is easy to use and importantly, is simple to implement, meaning that project document control, commences from the first day of the project. The fact that we have never lost a QDMS customer to another system speaks for itself.

To evaluate QDMS for yourself by installing a real working trial version, use the link from this screen.

- A **project based** document control system.
- **Managing the distribution of** controlled documents.
- Unique **transmittal engine** for issuing documents.
- Ensuring recipients are issued the **latest revision** of documents.
- **Auditable histories** of documents received and documents issued.
- **Simple search** and find methods plus easy report generation.
- Integrated **viewing** of CAD and other files.
- eTransmittals to take advantage of **email transmission** methods.
- Easy to use for **non technical** staff.
- **Get up and running the same day as installation**
- **The market leader in Australia** for eight years.
- Inexpensive **meaning it can be used on all projects, not just the larger ones.**

For more information contact:



Suppliers of Management Tools for Engineering and Construction Projects, used on over 46,000 projects over the last 11 years.

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