

# QTRAK FAQ - How to create MS Word Templates for Mail

FAQ No: TR-003  
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QA software

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## Introduction

With QTRAK version 3.3.2, QTRAK Mail forms can now use MS Word as an editor. This gives users the full functionality of MS Word for formatting when creating mail in QTRAK.

The decision to use MS Word as an editor is made on a per Mail Type per Project basis and applies to all users within the project.

Note that only MS Word 2000 and MS Word XP are supported. MS Word 97 is not supported.

The way that this new feature in QTRAK works in summary is:

- Define via Mail Type Rules which mail types you want to use MS Word with.
- Create the required Word Template using MS Word
- Then when creating mail in QTRAK of a type that is linked to Word, the mail details are completed as normal in QTRAK and when ready a button within the mail form to open Word is clicked.
- The Word Template, populated with the details entered in QTRAK is opened and the body text is completed using the full functionality of Word.
- When done, the mail is printed from MS Word
- Then MS Word is closed and QTRAK manages the saving of the word document automatically.
- The Body text typed in Word is copied automatically back into QTRAK (minus the formatting) to enhance search capabilities later.

The process for creating mail templates in summary is:

- (a) Copy the standard MS Word template provided with QTRAK to a new file called Mail Type.dot (for example Letter.dot) if you were doing this for a Letter mail type.
- (b) Modify the template to suit your required format. (This FAQ is intended to explain how to create and modify these mail templates in word).
- (c) Now you define in QTRAK that you want to use MS Word with this mail type.

## Creating a custom MS Word Template

In the instructions below, we have assumed you are going to make a Word Template for use with Letters in QTRAK.

### Getting Started

First you need to find out the mail type abbreviation used in your copy of QTRAK for Letters. Open QTRAK and select the Master Document Register. Click on the **Show** button and select **Letters**. Now in the **Type** column in the MDR you will see the mail type abbreviation. Lets assume this is LETTER.

Now you need to copy the default word template provided with QTRAK to LETTER.Dot. To do this, open windows explorer and in the QTRAK folder, locate the file **TrWdTemplate.Dot**. This is a standard template that can be used as the basis for your own word templates. Copy this file to a file called LETTER.Dot.

Now run MS Word 2000 or XP and open the file called LETTER.Dot from within the QTRAK folder. This will open the file as Letter.dot

Note that you must not open this template document by double clicking on it from within Windows explorer.

The word templates are always protected so you need to unprotect it to make changes:

From the **Tools** menu, select **Unprotect Document**.

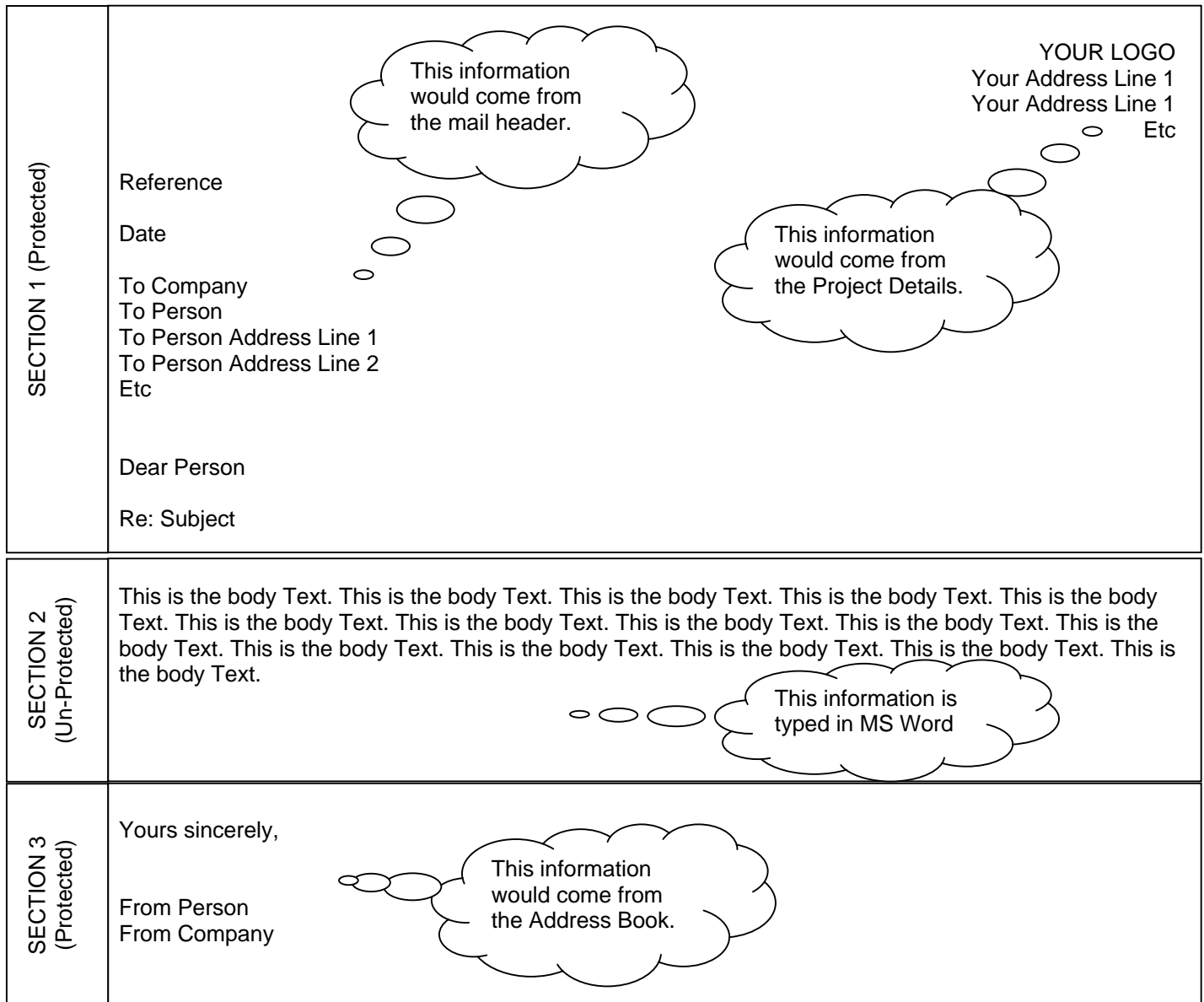
Type the password to **unprotect** the template which for this first template is **QtrakMSWordLink**. This is case sensitive and must be typed exactly as written above. Later you will change the passwords used so that the templates cannot be changed by unauthorised people.

## How the Templates work

The Templates work by using three features of Word. These are Sections, Bookmarks and Protection.

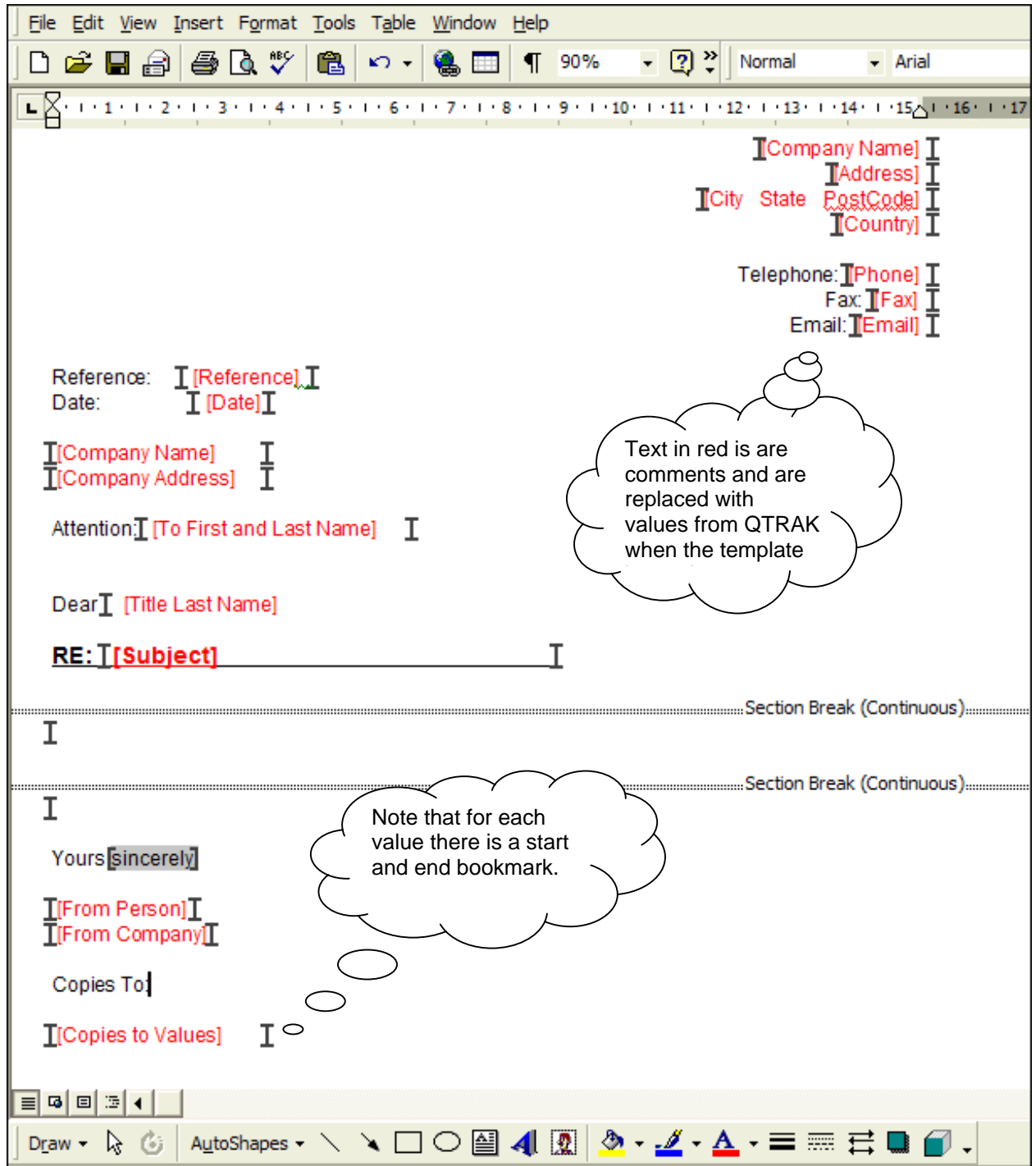
The Template must be divided into a minimum of three sections. The first and last sections are always protected which means that the information in these sections is populated from QTRAK and cannot be changed while the user is creating mail in Word. The middle section is always unprotected and is where the user types their text. How QTRAK knows where to put the data entered into the mail form when open MS Word is controlled by Bookmarks.

For example, your Letter may be designed as follows:



The information in the above that comes from the Project Details, the mail header etc finds it's way into the Word Template via Bookmarks that have been positioned in the mail template to match the QTRAK field names.

The Word Template Letter.doc to achieve the above could look as shown below:



## Working with Bookmarks

A bookmark in MS Word identifies a location or a selection of text. QTRAK uses bookmarks in the MS Word templates to identify the start and end of a field in the Word Template, so it can update the field with the value from the Mail form in QTRAK when MS Word is launched through QTRAK.

### **How to view the locations of Bookmarks:**

To view the locations of the bookmarks added in the template/ document, follow the below steps.

1. On the **Tools** menu, click **Options**
2. Click on **View** tab
3. Tick the **Bookmarks** check box under **Show**
4. Click **OK**

In order to hide the bookmarks, follow above steps and **un-tick** the **Bookmarks** check box at step 3.

### **How to add a Bookmark:**

1. Click where you want to insert a bookmark.
2. On the **Insert** menu, click **Bookmark**.
3. Under **Bookmark name**, type or select a name.

Bookmark names must begin with a letter and can contain any combination of letters & numbers. You can't include spaces in a bookmark name. However, you can use the underscore character to separate words — for example, "First\_heading."

**NOTE:** The bookmark name format should named as per the QTRAK Standard Bookmark naming convention as described in the appendix to this FAQ.

4. Click **Add**

Note, to edit or check the value of an existing bookmark, with your mouse positioned just to the right of the bookmark, use the Insert\Bookmark option as for adding new bookmarks.

### **Putting Bookmarks into Use:**

Say you wanted in your template to have an area that printed the name of the person the mail was addressed to. (This information is something you populate when completing the mail form in QTRAK).

In the word document you would want this to look like:

To: NAME

Where "To:" is a caption and "NAME" is the TO Persons first and last name.

To do this, first you have to work out the name of the bookmarks to use. In the Appendix of this FAQ you can find out that the Bookmarks for the TO Persons first and last name are:

bkm\_TOFNLN\_begin            which is used to indicate where the name is to start from.

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Bkm\_TOFNLN\_end which is used to indicate where to name is stop.

Hence in the word template you would

a) First type in the correct location the caption you want to appear which in this case is:

**To:**

Where "To:" is going to be the caption.

b) Then to the right of the colon, Click the Insert menu and select Bookmark.

c) Type the Bookmark Name as bkm\_TOFNLN\_begin and click Add

d) Now press space and type "[To First Name + Last Name]"

Note that this step is optional as this text will be replaced with the To person name when the template is used but it lets the person maintaining the template see what the value is without having to edit the book marks. Note that any text between a begin and end book mark is replaced when the template is used via QTRAK.

e) Now press the space bar a couple of times. Please ensure that the spaces provided should be at least 3 or more and not less. Then again select Insert \ Bookmark.

f) Type the Bookmark as Bkm\_TOFNLN\_end and click Add

In the appendix of this FAQ are a list of the standard bookmark names for use with QTRAK. These are standard fields from the Project details, address book and mail header.

To put custom fields (fields from the mail details part of the mail form in QTRAK) into your word template, you will need to find out the names of these fields from QA Software.

Note also that for the Bookmarks for the body text, normally bkm\_RfMail\_Details\_begin and bkm\_RfMail\_Details\_end, it is recommend to put the bkm\_RfMail\_Details\_end book mark as the first line in the protected section below the section the begin bookmark is in.

## Using Section Breaks

Sections in the Word templates separate the areas of the template where the user will be able to type from areas that are protected.

There must be at least 2 sections in each template. Normally there are at least 3 sections. Section 1 for the header, Section 2 for the user to type in, and Section 3 for the protected footer.

To see the existing section breaks, click the **Show/Hide Format codes** icon on the Word toolbar (**Show/Hide ¶**).

### How to insert a section break:

1. Click where you want to insert a section break.

**NOTE:** For templates to be used in QTRAK Wordlink, this position will normally be the end of the Mail header [[Section 1](#)] and the end of the Details section [[Section 2](#)].

- 2.
3. On the **Insert** menu, click **Break**.
4. Under **Section break types**, click the option that describes where you want the new section to begin.

**NOTE:** For templates to be used in QTRAK Wordlink, the '**Continuous**' **Section Break Type** will be used.

Now in each section you insert the necessary text, bookmarks, captions etc.

## Protecting the Template

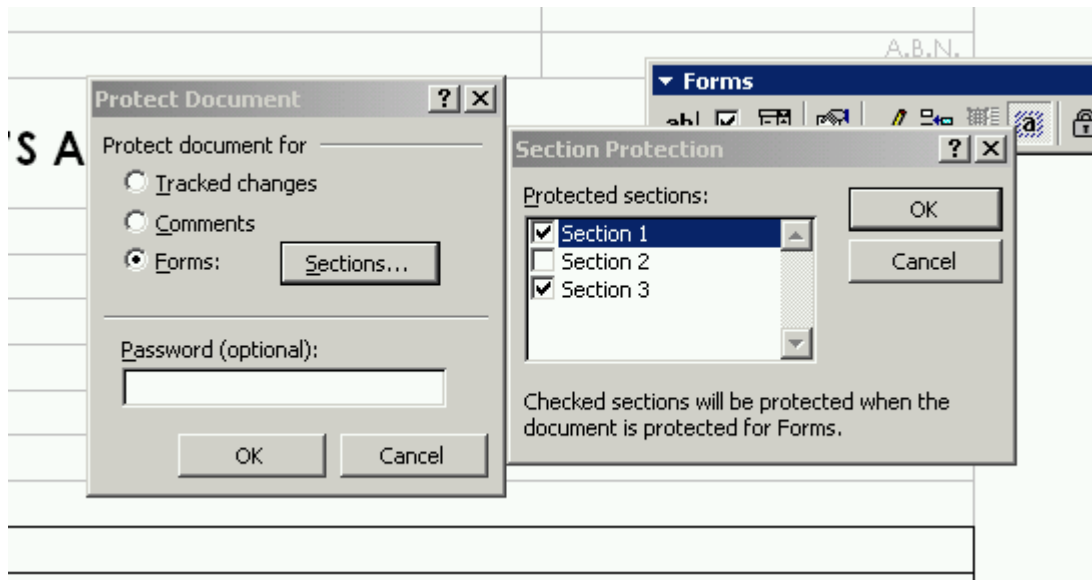
Once you have set up your template, it must be protected. This is to ensure that the fields in the template that are automatically from QTRAK can not be edited when the Word template is launched through QTRAK.

The template should be protected just prior to you wanting to use it (ie after you have inserted your fields and bookmarks and prior to you wanting to try it out).

### How to protect the section breaks

1. On the **Tools** menu, click **Protect Document**.
2. Click **Forms**.
3. Click **Sections**, and then clear the check boxes of the sections you don't want to protect and click **OK**.

For templates to be used in QTRAK Wordlink, [Section 2](#) has to be un-ticked in order to enable a user to enter details



4. Assign a **password** to protect the selected sections.

**NOTE:** Passwords are case sensitive.

5. Click **OK**.


**IMPORTANT:** Once the sections are password protected, these section will not be editable until they are unprotected. As QTRAK will be updating these protected sections automatically with the Mail table fields this password has to also be specified in QTRAK Mail Type Rules under Admin menu or the template cannot be used by QTRAK.

## **Saving the MS Word Template**

Once all the required steps are completed save the file as Word Template by clicking save and closing. Note that this is only possible if you opened the template from within Word. If you double clicked the template to open it you will have to use File\Save As to save and will have to choose a temporary file name eg LetterNew.Dot and then within windows explorer, locate QTRAK\Letter.dot and remove it and rename LetterNew.Dot to Letter.Dot. The template name must match the QTRAK mail type abbreviation.

Eg SI.DOT for Site Instructions, RFI.DOT for Requests for Information.

## **Setting up QTRAK to use the Word Template**

1. Log on to QTRAK
2. On the **Tools** menu, click **Mail Type Rules**.
3. Select a mail type.
4. Click on  (**edit**) button.
5. Click on **Work Flow** tab
6. Select the option to use MS Word as the editor.
7. Click on **Set Password for Word Templates** button. (This will be disabled if 'Use MS Word' is not selected as the formatting option for outgoing mail)
8. Enter the password and re-confirm. Note that they are case sensitive. This password must be EXACTLY the same as that used when protecting the word template above.

## **Appendix 1: QTRAK Standard Bookmark Naming Convention**

There should be 2 bookmarks (one to indicate the start position of the field and the other to indicate the end position of the field) to identify a field location in Word document, so that the value from the mail table can be inserted into the Mail Template.

QTRAK uses the following naming convention:

Bkm\_Table\_Field\_X

Where:

Bkm is fixed

Table is the name of the table the field exists in within QTRAK

Field is the name of the field in the QTRAK table

X is either "begin" or "end" to control the start and finish of the field in the word template.

For example, the reference number for an item of mail is stored in a field called "Reference" in a table called "RfMail". Hence the bookmark names to position the start and end of the Reference number in the word template are:

bkm\_RfMail\_Reference\_begin

bkm\_RfMail\_Reference\_end

## Appendix 2: Reserved Bookmark names

The following bookmark names are reserved bookmark names for standard fields in QTRAK which can be used in any custom Word templates to populate the corresponding values from the Mail form.

### A. Bookmarks names to Mail Header Details

Description	Bookmarks
To print the Reference Number	Bkm_RfMail_Reference_begin Bkm_RfMail_Reference_end
To print the Date	Bkm_RfMail_Dated_begin Bkm_RfMail_Dated_end
To Print the Status values	Bkm_RfMail_Status_begin Bkm_RfMail_Status_end
To Print the Subject	Bkm_RfMail_Subject_begin Bkm_RfMail_Subject_end
To Print the Respond By Date	Bkm_RfMail_RespondBy_begin Bkm_RfMail_RespondBy_end
To Print the Responded Date	Bkm_RfMail_Responded_begin Bkm_RfMail_Responded_end
To Print a list of Links	Bkm_pcmlLink_begin Bkm_pcmlLink_end
To Print a list of Attachments	Bkm_pcmlAttach_begin Bkm_pcmlAttach_end
To Print a list of Actions	Bkm_pcmlAction_begin Bkm_pcmlAction_end
To Print a List of Binder and Section Ids	Bkm_pcmlBndLnkID_begin Bkm_pcmlBndLnkID_end
To Print a list of Binder and Section Ids + Titles	Bkm_pcmlBndLnk_begin Bkm_pcmlBndLnk_end

### B. Bookmarks names to get TO and CC details

Description	Bookmarks
To print the multiple TO persons details in the following format: 1 <sup>st</sup> To Person FirstName+ ""+LastName 2 <sup>nd</sup> To Person FirstName+ ""+LastName	Bkm_TOFNLN_begin Bkm_TOFNLN_end
To print the multiple TO persons details in the following format: 1 <sup>st</sup> To Person Title + "" + FirstName + "" + LastName 2 <sup>nd</sup> To Person Title + "" + FirstName + "" + LastName	Bkm_TOTLFNLN_begin Bkm_TOTLFNLN_end
To print the multiple TO persons details in the following format: 1 <sup>st</sup> To Person Title + "" + LastName 2 <sup>nd</sup> To Person Title + "" + LastName	Bkm_TOTLLN_begin Bkm_TOTLLN_end
To print the multiple TO persons details in the following format: 1 <sup>st</sup> To Person Company 2 <sup>nd</sup> To Person Company	Bkm_TOCOMPANY_begin Bkm_TOCOMPANY_end

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To print the multiple TO persons details in the following format: 1 <sup>st</sup> To Person FirstName + “ “+ LastName + “ , “ + Company 2 <sup>nd</sup> To Person FirstName + “ “+ LastName + “ , “ + Company	Bkm_ <a href="#">TOFNLNCOMPANY</a> _begin Bkm_ <a href="#">TOFNLNCOMPANY</a> _end
To print the multiple TO persons details in the following format: 1 <sup>st</sup> To Person Title + “ “+ FirstName + “ “+ LastName + “ , “ + Company 2 <sup>nd</sup> To Person Title + “ “+ FirstName + “ “+ LastName + “ , “ + Company	Bkm_ <a href="#">TOTLNLNCOMPANY</a> _begin Bkm_ <a href="#">TOTLNLNCOMPANY</a> _end
To print the multiple TO persons details in the following format: 1 <sup>st</sup> To Person FaxNo 2 <sup>nd</sup> To Person FaxNo	Bkm_ <a href="#">TOFAX</a> _begin Bkm_ <a href="#">TOFAX</a> _end

### Notes:

To print the CC persons details replace the '[TO](#)' (in blue) with 'CC'

Eg:    bkm\_[CCFNLNCOMPANY](#)\_begin  
      bkm\_[CCFNLNCOMPANY](#)\_end

To print the 2<sup>nd</sup> TO person onwards and all CC persons details replace the '[TO](#)' (in blue) with '[TOCC](#)'

Eg:    bkm\_[TOCCFNLNCOMPANY](#)\_begin  
      bkm\_[TOCCFNLNCOMPANY](#)\_end

### C. Bookmarks names to get only ONE persons TO Details

Description	Bookmarks
FirstName + “ “+ LastName	bkm_pcmlToName_begin bkm_pcmlToName_end
Title	bkm_RfAdrBook_Title_begin bkm_RfAdrBook_Title_end
First Name	bkm_RfAdrBook_FirstName_begin bkm_RfAdrBook_FirstName_end
Last Name	bkm_RfAdrBook_LastName_begin bkm_RfAdrBook_LastName_end
Position	bkm_RfAdrBook_Position_begin bkm_RfAdrBook_Position_end
Company	bkm_pcMlToCompany_begin bkm_pcMlToCompany_end
Full Address	bkm_pcMlToAdr_begin bkm_pcMlToAdr_end
Address Line 1	bkm_RfAdrBook_Address1_begin bkm_RfAdrBook_Address1_end
Address Line 2	bkm_RfAdrBook_Address2_begin bkm_RfAdrBook_Address2_end
PO Box	bkm_RfAdrBook_PostalAdr_begin bkm_RfAdrBook_PostalAdr_end
City	bkm_RfAdrBook_City_begin bkm_RfAdrBook_City_end
State	bkm_RfAdrBook_State_begin bkm_RfAdrBook_State_end
Post Code	bkm_RfAdrBook_PostCode_begin bkm_RfAdrBook_PostCode_end
Country	bkm_RfAdrBook_Country_begin

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	bkm_RfAdrBook_Country_end
Telephone	bkm_pcMlToTel_begin bkm_pcMlToTel_end
Fax	bkm_pcMlToFax_begin bkm_pcMlToFax_end
Mobile	bkm_RfAdrBook_PhoneMob_begi n bkm_RfAdrBook_PhoneMob_end
Barcode	bkm_RfAdrBook_Barcode_begin bkm_RfAdrBook_Barcode_end
Email	bkm_pcMlToEml_begin bkm_pcMlToEml_end

### D. Bookmarks names to get the FROM persons Details

Description	Bookmarks
FirstName + " " + LastName	bkm_PCMLFromName_begin bkm_PCMLFromName_end
Title	bkm_RfAdrBook1_Title_begin bkm_RfAdrBook1_Title_end
First Name	bkm_RfAdrBook1_FirstName_begin bkm_RfAdrBook1_FirstName_end
Last Name	bkm_RfAdrBook1_LastName_begin bkm_RfAdrBook1_LastName_end
Position	bkm_RfAdrBook1_Position_begin bkm_RfAdrBook1_Position_end
Company	bkm_pcMlFromCompany_begin bkm_pcMlFromCompany_end
Full Address	bkm_pcMlFromAdr_begin bkm_pcMlFromAdr_end
Telephone	bkm_pcMlFromTel_begin bkm_pcMlFromTel_end
Address Line 1	bkm_RfAdrBook1_Address1_begin bkm_RfAdrBook1_Address1_end
Address Line 2	bkm_RfAdrBook1_Address2_begin bkm_RfAdrBook1_Address2_end
PO Box	bkm_RfAdrBook1_PostalAdr_begin bkm_RfAdrBook1_PostalAdr_end
City	bkm_RfAdrBook1_City_begin bkm_RfAdrBook1_City_end
State	bkm_RfAdrBook1_State_begin bkm_RfAdrBook1_State_end
Post Code	bkm_RfAdrBook1_PostCode_begin bkm_RfAdrBook1_PostCode_end
Country	bkm_RfAdrBook1_Country_begin bkm_RfAdrBook1_Country_end
Fax	bkm_pcMlFromFax_begin bkm_pcMlFromFax_end
Mobile	bkm_RfAdrBook1_PhoneMob_begi n bkm_RfAdrBook1_PhoneMob_end
Barcode	bkm_RfAdrBook1_Barcode_begin bkm_RfAdrBook1_Barcode_end
Email	bkm_pcMlFromEml_begin bkm_pcMlFromEml_end

**E. Bookmarks prefixes to control the DATE format**

Description	Bookmarks
To print date as DD/MM/YY say for the DATED field	bkm_DMY_RfMail_Dated_begin bkm_DMY_RfMail_Dated_end
To print date as DD/MM/YYYY say for the DATED field	bkm_DMYY_RfMail_Dated_begin bkm_DMYY_RfMail_Dated_end
To print date as 20 March 2003 say for the DATED field	bkm_DCMYY_RfMail_Dated_begin bkm_DCMYY_RfMail_Dated_end
To print date as Thursday, 20 <sup>th</sup> March 2003 say for the DATED field	bkm_CDDCMYY_RfMail_Dated_begin bkm_CDDCMYY_RfMail_Dated_end

**F. Bookmark names for the Project Details**

Description	Bookmarks
Project Company name	Bkm_ga_cCompany_begin bkm_ga_cCompany_end
Project Company Address 1	Bkm_ga_cAddress1_begin bkm_ga_cAddress1_end
Project Company Address 2	Bkm_ga_cAddress2_begin bkm_ga_cAddress2_end
Project Company Address 1 + Address2	Bkm_ga_cFullAddress_begin bkm_ga_cFullAddress_end
Project Company City	bkm_ga_cCity_begin bkm_ga_cCity_end
Project Company State	bkm_ga_cState_begin bkm_ga_cState_end
Project Company PostCode	bkm_ga_cPostCode_begin bkm_ga_cPostCode_end
Project Company City + " " + State + " " + PostCode	bkm_gt_cCityStatePostCode_begi n bkm_gt_cCityStatePostCode_end
Project Company Phone	Bkm_ga_cPhone_begin bkm_ga_cPhone_end
Project Company Fax	Bkm_ga_cFax_begin bkm_ga_cFax_end
Project Company Email	Bkm_ga_cEmail_begin bkm_ga_cEmail_end
Project Company Internet	bkm_ga_cInternet_begin bkm_ga_cInternet_end