

FAQ How to Synchronise QTRAK between Sites

FAQ No: TR-005
Last Reviewed: 9th Feb 2005
Issue No: 5A



QA software

1. Introduction

QTRAK is designed as a “File Server” system meaning that it is designed to run on a PC or Local Area Network (LAN). QTRAK generally will not run successfully over a Wide Area Network (WAN) without using software like Citrix or Terminal Server.

This limitation in QTRAK means that when projects are being managed out of multiple physical locations (for example a head office and a site office), QTRAK needs to be installed at both physical locations. This has the implication that users on Site would not be able to see correspondence created and received by Head Office and users on the Head Office would not be able to see correspondence created and received by site.

This limitation is overcome by synchronising the data in QTRAK that is installed at two or more locations on a periodic basis so that all locations can eventually see all correspondence regardless of where it was generated or received. Note that the versions of QTRAK at each location must be **identical**.

A possible problem in Synchronisation of data from multiple locations would normally be the issue of duplicate reference numbers. For example there could be a Site Instruction 1000 at both Site and Head Office. This issue is solved by assigning each QTRAK Install a unique Installation ID which is used as a prefix for all correspondence created or received at that location.

The following procedure covers the theory, setup and workflow for the synchronization process.

2. When to Use QTRAK Synchronisation

QTRAK Synchronisation is typically used when a project is being undertaken by staff located at a number of separate locations and QTRAK is installed locally on Local Area Networks (LANs) or stand alone PCs at each location.

3. How it works

To ensure that correspondence generated at any location has a unique reference number when consolidated/synchronized to the correspondence from other locations, QTRAK uses the concept of MASTER and INSTALL locations.

MASTER LOCATION - The Master Location is the central location where the majority of QTRAK correspondence is generated/recorded. This location will maintain the master copies of the project address book and project binder definition. There is only one MASTER location per project.

INSTALL LOCATION – The Install Location is the location of the actual QTRAK Installation eg head office, site office, satellite office. There is a unique install location for every location using QTRAK on the project. The Install Location ID is used to then prefix QTRAK reference numbers generated at that Install Location. Each remote location requires its own QTRAK License.

Example Configurations:

Head Office

Location ID = HO

Master Location = HO

Install Location = HO

Correspondence generated / processed at Head Office will have reference numbers (per form type) as follows:

HO-0001

HO-0002

Site Office

Location ID = SI

Master Location = HO

Install Location – SI

Correspondence generated / processed at the Site Office will have reference numbers (per form type) as follows:

SI-0001

SI-0002

4. Setting up the Synchronisation Process at the Master Location

Typically, the first location QTRAK is installed at will be set up as the Master Location

A - At Project Creation

1. Decide on Location IDs for all possible locations using QTRAK.
2. From the File menu – select **New Project**
3. Enter your Project Number and press TAB
4. Complete the remaining fields on this screen (do not change the Database Suffix and Directory values).
5. Click Next to take you to the next screen of the Project Creation Wizard.
6. When you get to the Synchronisation screen, enter your chosen Master and Install Location Ids (see examples above if you are unsure)
7. Click Finish

Note: The Synchronisation process will be specific to this project.

B - Setting up post project creation:

1. Decide on Location IDs for all possible locations using QTRAK.
2. Ensure you are the only user currently using QTRAK
3. Click on the **Tools** menu
4. Select **Assign Location Ids**
5. Enter your chosen Master and Install Location Ids (see examples above if you are unsure)
6. Tick the **All Projects** box if you require Synchronisation to occur over every project within QTRAK. Leave this un-ticked if you are unsure.

7. Click OK

5. Setting up the Synchronisation Process at the Install Location

Each location using QTRAK must create the same project as the one at the Master Location using **exactly** the same project number as that used at the Master Location. Note that the version of QTRAK at these locations must be **exactly** the same as at the Master Location.

C - Create a new project at the Install Location

1. Locate the project folder to be synchronised at the Master Location and note the project number.
2. Run QTRAK at the Remote Location
3. From the File menu select **New Project**
4. At the first screen of the Create Project Wizard type in the Project Number that you located in step 1. It is mandatory that the project number at the remote location is the same as the project number at the Master Location.
5. At the Synchronisation screen, enter your chosen Master and Install location Ids (see the examples on page 1 if you are unsure).
6. Click Next and then Finish.
7. Repeat the above at each location.

Note: If QTRAK is not already installed at the Install Location, you must first install QTRAK as per FAQ – How to Install QTRAK and Get Started.

6. The Synchronisation Work Flow

D – Initial Synchronisation

Once the remote site(s) are setup the initial synchronization process is:

Master to Remote:

1. Export and send data from Master to Remote Location (see F below)
2. Receive and import data at Remote Location from Master (see G below)

Note: This will bring the remote site up to date will all correspondence processed at the Master Location.

E – Ongoing Synchronisation

Once the remote location has received the initial data to be synchronized from the Master Location the ongoing process is as follows:

Remote to Master:

1. All remote locations export and send to the Master Location (see F below)
2. The Master Location receives and imports all data from the Remote locations (see G below)
3. The Master Location exports and sends data to all Remote locations (see F below)
4. All Remote Locations receive and imports the data from the Master Location (see G below)

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F – Exporting Correspondence

1. From the **Tools** Menu, choose **Synchronisation**, and then select **Export Data**
2. Select the To folder if required, otherwise leave the default setting as is which is the recommended option.
3. Click OK. A zipped export file will be created for all correspondence at this location.
4. Send this file to your other sites via email.

G – Importing Correspondence

1. From the **Tools** Menu, choose **Synchronisation**, and then select **Import Data**. This utility will allow you to import a file sent to you by other sites.
2. Select the correct Import File using the select button and then click OK.

Note: Existing entries are not overwritten.

7. Procedural Issues

Address Book: – Entries to the Address book are maintained only at the Master Location

Binder – Section Definition: - Binders and Sections are maintained only at the Master Location

Attachments: - Attachments such as scanned images are not included in the Synchronisation process although the file names and paths are included.

Synchronisation: - should always take place between Remote and Master locations and vice versa. Do not try to synchronise between two Remote Locations. The Synchronisation must **always** be via the Master Location.

8. Support

If you are having any problems with getting our software installed or getting started, please don't hesitate to contact our Technical Support Division by Phone: + 61 3 8379 0000, Fax: + 61 3 9326 6544 or Email: support@qa-software.com