

FAQ – Using Word Integration & eCorrespondence in QTRAK

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QA software

1. Introduction

This FAQ provides information on setting up and troubleshooting QTRAK to use Word Integration and eCorrespondence.

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2. Word Integration

This feature allows QTRAK users to make use of the powerful features of MS Word for all their correspondences. This gives QTRAK an edge over other products to be flexible enough for integration and allows users to stick to their favourite word processor for daily needs. The decision to use MS Word as an editor is made on per Mail Type per Project basis and applies to all users within the project.

You need to have Word Templates for all the Mail Types available in your QTRAK application directory C:\QASOFT\QTRAK, where C: is the drive volume where QTRAK is installed. Please refer FAQ-tr-003 on “How to Create MS Word Templates for Mail”, for assistance. As a guiding example for this FAQ, we will use Mail Type as “Letter” which is the most common Mail Type for using Word Integration.

2.1. How to setup

Please follow the steps mentioned below:

- § Launch QTRAK Application.
- § Login to any project with a username, which has administrative rights.
- § Select Mail Rules from Tools menu item. Click Tools->Mail Type Rules
- § In the Mail Type Rules window, select Letter
- § Double click Letter Mail Type
- § Select Letter Mail Type and click ‘Edit’ button on the toolbar at the top
- § In Edit Mail Type Rules window, select ‘Workflow’ tab
- § In bottom left corner, in ‘Formatting for outgoing mail:’ select ‘Use MSWord’ option
- § Click the ellipse button, , next to ‘Set Password for Word Templates:’
- § In the Password window, enter password set for the word template by you.

NOTE: general advise is to use ‘qtrak’ as your password, as it is easy in case you forget the password and QA needs to retrieve it for you. Or in some case you might have created some parts of the template sent to QA for finish or QA might have prepared the templates for you as part of order or customisation. In these circumstances it is easy to keep a standard..

- § Re-Enter password
- § Click OK button
- § Click Close button on 'Mail Type Rules' window

You are done setting up the Word Integration feature with Mail Type 'Letter'. In same way you can follow the above-mentioned steps to setup 'Word Integration' for other Mail Types.
Now proceed with section 2.2.

2.2. How to Use

- § Launch QTRAK Application.
- § Login to any project with a username, which has administrative rights.
- § Open MDR from 'Favourites' pane on left hand side of the Dashboard or Select the option 'Master Document Register' from 'View' menu.
- § Click New->Letter
- § Select 'Addressee' from the address book and click Ok
- § Enter 'Subject' of the Letter and Click 'Save' to save the document.
NOTE: it is compulsory to save the document before launching the Word Integration.
- § Click "Launch Microsoft Word" to launch MS Word.
- § You will notice that all the details of the Mail type have been entered for you as designed in your template.
- § You can enter the details of the letter and finish.
- § Close the Word document when you are done to return to QTRAK
- § Click close to return to MDR.

NOTE: The Body text typed in Word is copied automatically back into QTRAK (minus the formatting) to enhance search capabilities later.

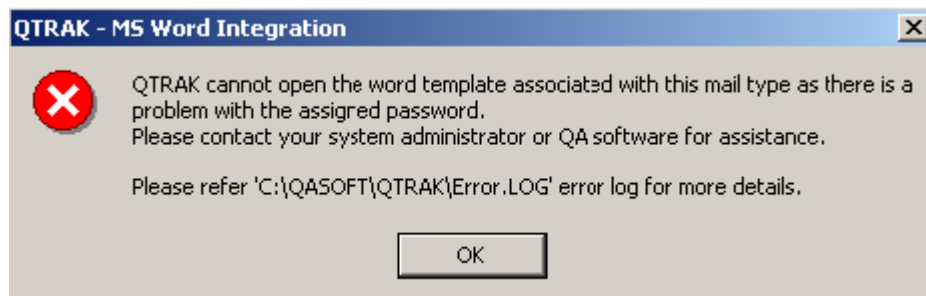
2.3. Troubleshooting

Problem 1:

Password mismatch

Cause:


The below message is the most common error message that occurs, when QTRAK is unable to automate word.



This error dialog is self-explanatory. This error happens when you have setup a different password in QTRAK than the one you have in your MS word template.

Solution:

Follow the below mentioned steps to reset the password in QTRAK:

- Select Mail Rules from Tools menu item. Click Tools->Mail Type Rules
- In the Mail Type Rules window, select Letter
- Select Letter Mail Type and click 'Edit' button on the toolbar at the top
- In Edit Mail Type Rules window, select 'Workflow' tab
- Click the ellipse button, , next to 'Set Password for Word Templates:'
- In the Password window, enter password set for the word template by you. NOTE: The password needs to be the exact password you have setup for the template. If QA software provided the templates for you then please set the password as 'qtrak'. Also note that the passwords are case sensitive.
- Re-Enter password
- Click OK button
- Click Close button on 'Mail Type Rules' window.
- Try launching the mail template again

Problem 2:

Template formatting or data changes are not reflected for existing documents when using the Word integration from QTRAK, but are visible outside QTRAK in the physical template file.

Cause:

QTRAK preserves a link to all MS Word documents, when they are created for the first time. Sometimes clients after using the templates for the first time make some changes to templates, in term of data displayed or format of the data, to make the templates more adaptable. These changes are not reflected in the existing documents. The reason for this is that the link file has not been updated.

Solution:

Delete the link file with old data and formatting and create the link file again by using the new template. NOTE: Data in the particular MAIL Document is not lost as result of deleting the link file as data is preserved internally in QTRAK and loaded on the fly when the Word Integration feature is used. Follow below mentioned steps to delete the word link file:

Backup QTRAK application folder i.e. C:\QASOFT\QTRAK where C: is the drive volume where QTRAK is installed

Select and open the desired project folder. For eg. If it is 'DEMO' project than the path is C:\QASOFT\QTRAK\PROJECTS\DEMO

Select and Delete the folder 'Wordlink'.

Launch QTRAK and check the Mail document again by using word integration to see if the changes are reflected.

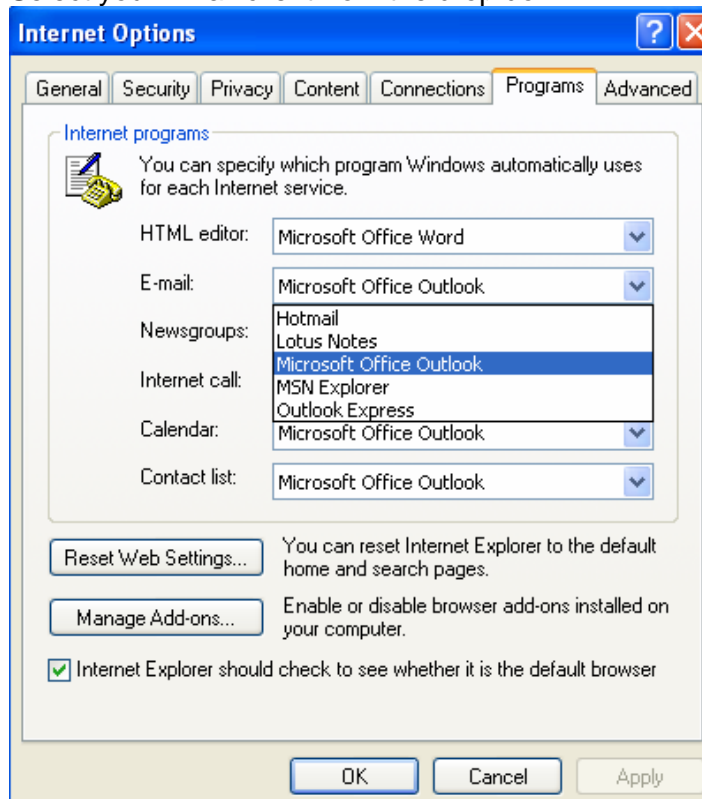
3. eCorrespondence

This feature, as the name suggest, allows the user to manage correspondence from QTRAK using their default email client. QTRAK supports most of the major mail clients like MS Outlook, Outlook Express, Lotus Notes & Novell Group wise. By using the eCorrespondence feature the user can send correspondence from QTRAK through his/her email client and also import correspondence from email client into QTRAK. QA software advises user to use MS Outlook as their email client when considering MS Outlook & Outlook Express.

3.1. How to Setup

- § Setup your email client in QTRAK
 - a. Select 'Options' from 'Tools' menu
 - b. Select 'Program Defaults' tab
 - c. In the bottom left section select 'Email Client:' and set it as 'Other' for MS Outlook and Outlook Express. For others select the options accordingly.
 - d. Click 'Save' and 'Close' to return to Dashboard

- § Setup default email client through Internet Explorer (IE)
 - a. Launch Internet Explorer
 - b. Click 'Tools' ->'Internet Options'. Select 'Programs' tab
 - c. Select your Email client from the drop down.



- d. Click ok. Close IE window

3.2. How to Use

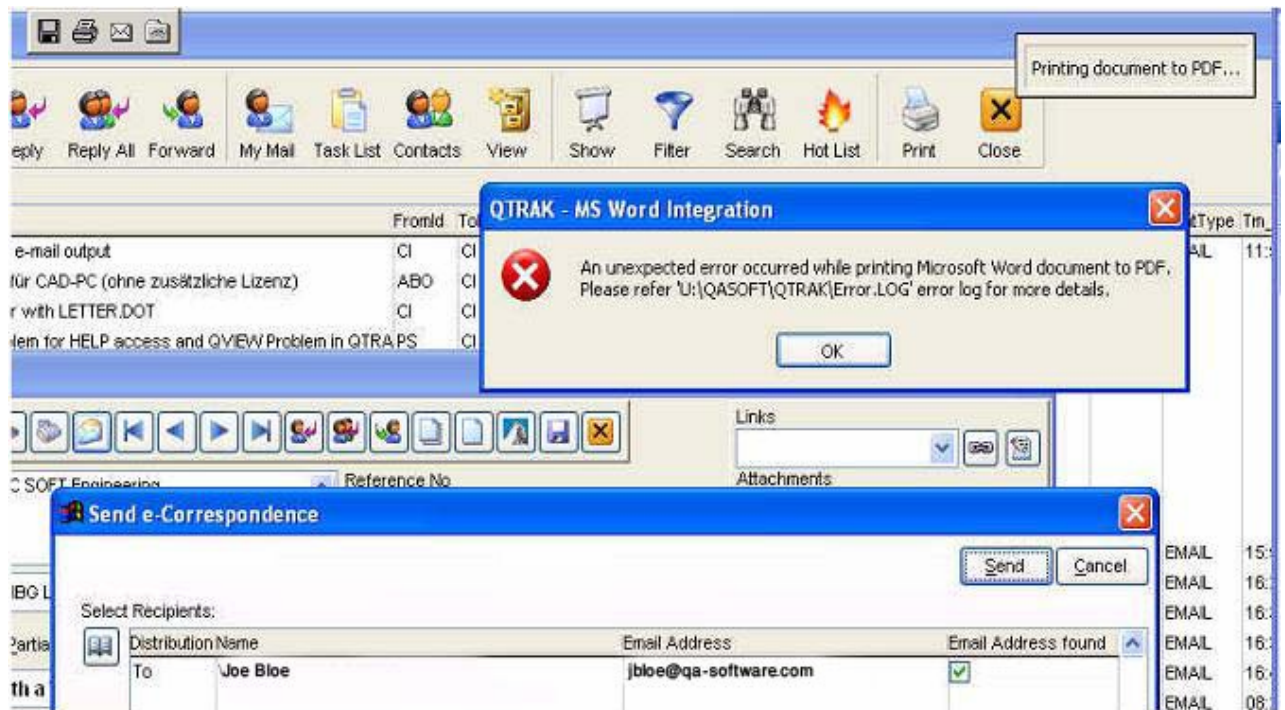
- § Import emails from Outlook
 - a. Select 'Import Email' option from 'eCorrespondence' menu
 - b. Click 'Refresh' in the 'Import Email' window
 - c. When ask about program trying to access email client, say 'yes' and give access for 10 min.
 - d. QTRAK will import all the emails and also give a list of the ones, which couldn't be imported.

- § Sending Emails from Outlook Correspondence Register
 - a. Open the mail document that you would like to send as Email.
 - b. From the toolbar select 'Email report'
 - c. Select the recipients from the QTRAK address book and click send.
 - d. Click 'yes' when asked about the security of the email client

3.3. Troubleshooting

Problem 1:

PDF printer driver when sending an email via eCorrespondence.



Cause:

This problem is most common and happens if the PDF printer driver is not installed for QTRAK. When sending mail through eCorrespondence, QTRAK converts the mail into a PDF file and sends it as an attachment. For this QTRAK needs the PDF printer driver installed on the system. The PDF printer driver is available for installation when QTRAK is installed. It needs to be installed manually and is not installed automatically with QTRAK. Once installed QTRAK uses the PDF driver to convert mails to PDF.

Solution:

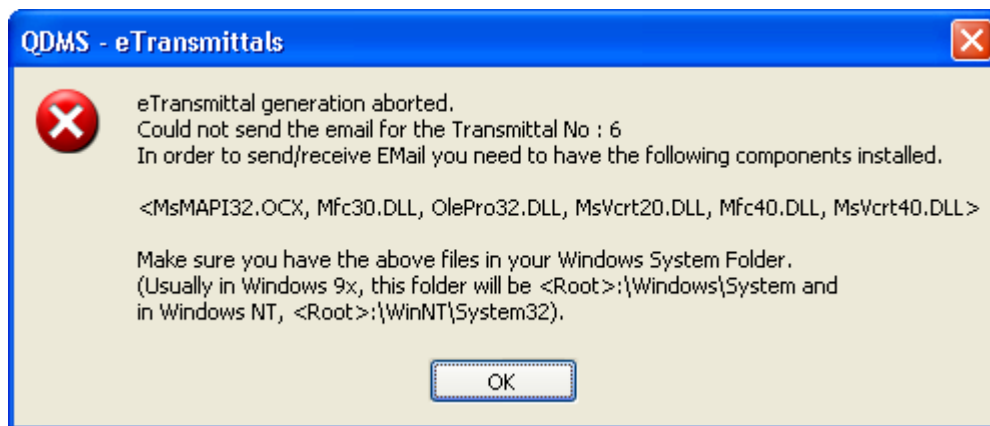
Please follow below mentioned steps to install the PDF printer driver.

- § Locate the folder C:\Program Files\QA Software\System using windows explorer
- § Locate and Double click file 'install.bat' or 'install.exe'
- § Click Ok on the screen, which says 'Printer driver installed'
- § Check for the printer in printers section by selecting START->Settings->Printers

Note: The above requires administrative access to your PC.

Problem:

Missing DLLs or control files when using Outlook Express as email client, an error dialog similar to the one below is generated.



Cause:

This problem happens due to a missing Registry entry in the machine which refers MAPI activex control, which is used by QTRAK for eCorrespondence. A registry patch is required to be installed to solve this problem

Solution:

Please contact QA software for this registry patch.

Once you receive the patch please follow the steps mentioned below to install the MAPI patch.

- § Extract the attached zip file to a temp folder on C:\ drive say c:\temp
- § Double click to install the registry patch. Say yes when asked
- NOTE: you will need administrative rights on the machine in order to install the patch.
- § It is advisable that you inform your IT before installing the patch yourself or you can ask them to do it for you.

4. Support

If any steps or solutions provided in the FAQ don't change the problem or some other error, not listed here, comes up contact QA Software at +61 3 8379 0000 or support@qa-software.com