QA/QC Tracker – Help & Instructions

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1. Getting Started

What is the QA/QC Tracker?

The QA/QC Tracker is a web-based tool for managing construction inspection checklists, material deliveries, and project milestones. Everyone on the team can access it from any computer or phone using a web browser — no software to install.

Navigating the App

- **On a computer:** Use the sidebar menu on the left side of the screen.
- **On a phone or tablet:** Tap the menu icon at the top left to open navigation.

Understanding the Sidebar

- **Dashboard** — Your home page with an overview of everything.
- **Buildings** — Click a building name to see all the areas (rooms) inside it.
- **Inspections** — Filter inspections by status: Upcoming, Past Due, Completed, or In Progress.
- **Other** — FOKs, Materials, Customer Milestones, Calendar, Schedules, ACC Forms, and Settings.

> Tip: Almost everything saves automatically. No need to look for a Save button.

2. Dashboard

The Dashboard is your home page with a summary of everything happening across the project.

What You Will See

• **Inspection Progress Cards** — Completed, Upcoming, Past Due, and Not Started counts with a progress bar.
• **FOK Tracking Cards** — Same breakdown for First-of-Kind items.
• **Material Tracking Cards** — Delivered, Past Due, Upcoming, Pending. Warns if delivered items are missing L1 inspections.
• **Inspection Scores** — Overall and per-building averages (if scores have been entered).
• **Past Due / Upcoming Lists** — Shows which specific areas need attention.

Buttons at the Top

• **Export Excel** — Downloads an Excel spreadsheet of all inspection checklists (L2–L5).
• **1-Week Look-Ahead** — Downloads a PDF of everything due in the next 7 days. Past-due items in red.
• **6-Week Look-Ahead** — Same but covers the next 6 weeks.

Quick Area Lookup — Dropdowns at the bottom to jump directly to any building and area.

Step-by-Step: Download a Look-Ahead Report

1. Go to the Dashboard.
2. Click the 1-Week or 6-Week Look-Ahead button near the top right.
3. A PDF file will download. Open it to see a formatted report you can print or email.

3. Buildings

Click any building name in the sidebar to see all the areas (rooms) inside that building.

• A table listing every area, with progress bars for each inspection type (L1–L5).
• Filter buttons at the top: All, Completed, Upcoming, Past Due.
• Click the area name or the pencil icon to open the detail page.

4. Room / Area Detail

This is the main page for tracking inspections in a specific area.

L1 Inspections (OFCI / Material Verification)

L1 tracks individual material deliveries. Each delivery gets its own form:

• Enter the **Form Number**, set a **Link** (click the link icon), and pick a **Completion Date**.
• Click **Add Form** for areas with multiple deliveries.
• Click the link icon — if no link is saved, paste a URL. If a link exists, it opens in a new tab.

L2–L5 Inspections (Standard Checklists)

• Set **Start Date** and **Finish Date**. The system auto-creates milestones.
• 7 days or less: 50% and 100%. Longer: 25%, 50%, 75%, 100%.

Working with Milestones

• **Checkbox** — Check to mark complete. Today's date fills in (editable).
• **Score** — 0–100 quality rating (optional). Average calculated automatically.
• **Form Number / Link** — Enter form number, click link icon for URL.

Navigation: Prev/Next buttons to move between areas. Saving indicator at top right.

> Everything on this page saves automatically as you type or make changes.

Step-by-Step: Complete a Milestone

1. Navigate to the area (building → area name).
2. Find the inspection type (e.g. L3).
3. Check the box next to the milestone percentage.
4. Date fills in. Optionally enter Score and Form Number.
5. To add a link: click the link icon, paste URL, click OK.

Step-by-Step: Add a Link to a Form

1. Click the link icon next to the form field.
2. If gray: no link yet. A pop-up asks you to paste the URL.
3. Paste and click OK. The icon turns blue/green.
4. Click the icon anytime to open the link in a new tab.

5. Inspections List

Sidebar links: Upcoming, Past Due, Completed, In Progress. Each shows a filtered list.

- **Filters:** Building dropdown, search box, status tabs.
- **Columns:** Area (clickable), Building, Type, Progress, Overall %, Next Milestone, Status.

6. Materials Tracking

Tracks incoming material deliveries and links them to L1 inspections.

Top Section

- **Delivery Progress Bar** — Percentage of materials delivered.
- **L1 Warning Banner** — Yellow if delivered items missing L1; green when all covered.

Buttons

- **Import Spreadsheet** — Upload Excel to add/update materials.
- **Export L1 List** — Download Excel of L1 checklists with status.
- **Add Material** — Manually add a single item.
- **Delete All** — Removes everything. Use with extreme caution!

Searching, Filtering, and Sorting

- **Search box** — Type to instantly filter across all columns.
- **Building / Status** dropdowns to narrow results.
- Click **column headers** to sort. Click again to reverse.

Column Guide

- **Need By Date** — When the material should arrive.

- **VCD** — Vendor Confirmed Date.
- **Delta** — Days between need-by and actual delivery. Red = late, green = early.
- **L1** — Linked L1 inspection form number (clickable if link exists).

Step-by-Step: Import a Material Spreadsheet

1. Click Import Spreadsheet.
2. Choose your Excel file (.xlsx or .xls) and click Upload.
3. The system auto-detects columns and matches existing records to update them.
4. New items are added. Already-delivered items are not overwritten.
5. A summary shows how many were added and updated.

Step-by-Step: Mark Delivered and Assign L1

1. Find the material (use search). Click the pencil icon.
2. Set the Actual Delivery Date.
3. In the L1 Checklist dropdown, select the form. Created forms listed first; uncreated below.
4. Click Save. The row and banner update instantly.

> Tip: If you mark delivered without assigning L1, a pop-up asks if you want to assign one now.

7. FOKs (First-of-Kind Items)

FOKs are special items needing approval or certification before the rest can proceed.

- **Add FOK** — Create with description, dates, form number, link.
- **Edit / Delete** — Pencil to edit, trash to delete.
- Setting a **Completion Date** marks the FOK as Completed.
- The **Form Number** becomes a clickable link if a URL is attached.

8. Customer Milestones

Track customer-facing deliverables: turnover, commissioning, testing, etc.

- **Add Milestone** or **Import Excel** to add records.
- Summary cards show Total, Completed, Past Due, Upcoming.
- Import recognizes flexible column names. New records added; existing not deleted.

9. Calendar

Visual calendar showing milestones, deliveries, FOKs, and customer milestones.

- **Views:** Month, Week, or List. Filter checkboxes to show/hide event types.
- **Colors:** Blue=milestone, Purple=final checklist, Orange=FOK, Teal=delivery, Pink=customer milestone, Green=completed, Red=past due.
- Click any event to go to its page.

Subscribe to Calendar

1. Click Share/Subscribe on the Calendar page.

2. Click Copy iCal URL.
3. Google Calendar: + next to Other calendars → From URL → paste → Add.
4. Outlook: File → Account Settings → Internet Calendars → New → paste.
5. Apple Calendar: File → New Calendar Subscription → paste.

The subscription updates automatically as things change.

10. Exports & Reports

- **Inspection Checklists (Excel)** — Dashboard → Export Excel. All L2–L5.
- **L1 Checklists (Excel)** — Materials → Export L1 List.
- **1-Week / 6-Week Look-Ahead (PDF)** — Dashboard buttons.

> Excel exports include clickable hyperlinks to form URLs.

11. Settings

Bulk Import Buildings & Areas

1. Go to Settings, click Bulk Import.
2. Upload Excel with: Building, Area (or Room), and optionally Section.
3. Creates buildings/areas that don't exist. Auto-creates L1–L5 inspection cards.

Managing Buildings: Edit name/display order. Delete only if no areas exist.

Managing Areas: Edit name/section. Delete only if no inspections (safety feature).

12. Schedules (Experimental)

> NOTE: This feature is still being developed. Schedule matching is being improved to pick up more activities. The goal is to simplify to fewer buttons — eventually one per building or one for the whole project.

Import Primavera P6 schedule files (.xer) to auto-set start/finish dates on checklists.

Uploading: Schedules → Upload XER → select file → Upload & Parse.

Viewing: Each file gets a tab. Search, filter by WBS/Status, check Critical Only.

Auto-Populating Dates

1. Click an inspection type button (L2-INFRA, L3-ISP, L3-OSP, L4-NETWORK).
2. Preview shows matched activities and new dates.
3. Review matches, uncheck any you don't want.
4. Click Apply. Dates and milestones update automatically.
5. Use Reset to clear dates from a specific auto-populate.

Activity Columns: ID, Name, Status, % Complete, Float (red = critical path).

13. Tips & Tricks

Browser Tricks

- **Bookmark pages** — Filters and search terms saved in URL.
- **Multiple tabs** — Open different areas side by side.
- **Back button** — Works normally throughout the app.

Material Search URL: Add ?search=keyword to the Materials URL to share a pre-searched link.

Link Icons: Gray = no link, click to paste URL. Blue/green = link saved, click to open.

Import Tips: Column names are flexible. Merged cells handled. Delivered items protected.

Delta Days: Red positive = late. Green negative = early. 0 = on time.

Calendar Subscription updates automatically. New items appear without action.

Look-Ahead Reports are great for meetings. Past-due items highlighted in red.