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. Receiving (Experimental)

NOTE: Receiving is experimental. It is designed for the warehouse / receiving dock so deliveries can be checked off the truck quickly using a phone or tablet.

The big picture: create a session (one per truck), tell it what you're expecting, scan/count the actual items, then complete the session. When the session is completed every matched material is automatically marked Delivered on the Materials page — no double entry.

Start a Session

1. Go to Receiving in the sidebar.
2. Type a name (truck/vendor/date works well) and click New Session.

Three Ways to Load Expected Items

- **Add One Line at a Time** — Pick a Lookup Type (PO / FBPN / MPN), enter the value and expected quantity, click Add Line.
- **Bulk Scan / Paste** — Paste a list of PO/part/serial numbers from a spreadsheet, email, or barcode wedge into the Bulk Scan box and click Match. Understands the IMP barcode format (PO@IMP@serial*qty) and dedupes repeats.
- **Snap a Photo of the Packing List (OCR)** — Open Import Packing List, choose one or more photos (you can take them on a phone), and click Upload & Read. AI reads the picture and creates a line for each item it can match.

Working with Lines

- A progress bar shows scanned vs. expected. Status: Matched, Partial, or Unmatched.
- **Reset** sets a line's scanned count back to zero.
- **Switch Material** dropdown lets you re-point a line to the right material when the same MPN appears on more than one PO.

Complete a Session

1. Make sure each line shows Matched (or you have accepted partials).
2. Click Complete Session at the bottom.
3. The session locks and every matched material is stamped with today's Actual Delivery Date on the Materials page; the L1 warning banner updates immediately.

Tip: If a quantity comes in higher than the master quantity on the material record, the system will not match it — use the Switch Material dropdown to pick the correct PO so you don't accidentally over-receive against a small PO.

14. Issues / Punch List

The Issues page tracks punch list items and deficiencies that need to be fixed before closeout. Each issue is tied to a building and area.

Closeout Score

Each issue gets a score from 0 to 100. It starts at 100 on the reported date and drops 3 points per day until the issue is resolved (minimum 0). Green = at or above 70, Yellow = 40 to 69, Red = below 40. Only issues whose Assigned To name contains 'IES' are scored — the rest show a dash.

Adding an Issue

1. Click Add Issue. Enter Title, Building, Room, Assigned To, and any form info.
2. Reported Date defaults to today. Click Add Issue.
3. Edit later by clicking the title or pencil icon. Setting status to Resolved or Closed auto-fills today's resolved date.

Promote an Issue to a Lesson Learned

Click the lightbulb icon on any issue row to convert it into a Lesson Learned. The lesson opens pre-filled with the issue's building, area, title, and description — just finish Root Cause / Corrective Action / Preventive Action and save. The original issue is left untouched.

15. Lessons Learned

The Lessons Learned page captures after-the-fact knowledge from the job — what happened, why, what was done about it, and most importantly what to do differently next time. Entries are intended for closeout documents and to feed institutional knowledge into the next project. Because lessons are documented after the fact, there is no status field.

Layout

Lessons are grouped by Building → Area / Room. Severity cards at the top (Critical / High / Medium / Low) act as filters; click a card to filter, click again to clear.

Adding a Lesson

1. Click **New Lesson** in the upper right.
2. Enter a short Title, Building, Area / Room, Date Observed, and Severity.
3. Optionally enter Submitted By and comma-separated Tags.
4. Fill in the four narrative fields:

• **What Happened** — Plain-English story of the event.
• **Root Cause** — Why it actually happened, not just the symptom.
• **Corrective Action (this job)** — What was done to make it right here.
• **Preventive Action — Don't Do This Again** — The change in process, training, or checklist that prevents the same mistake on the next job. This is the most important field.

Promote an Issue into a Lesson

Most lessons start as a punch-list issue that taught the team something. From the Issues page, click the lightbulb button on any row to promote it. The lesson opens pre-filled with the issue's building, room, title, and description — finish the Root Cause, Corrective Action, and Preventive Action fields and save. The original issue is left untouched and a back-reference is kept so the PDF export can show '(from Issue #N)'.

Export PDF (Closeout Document)

Click **Export PDF** in the upper right of the Lessons Learned page to download a formatted closeout report. The export respects the current filters — if you have filtered to one building or one severity, only those lessons are included. Clear the filters to export everything. The PDF groups lessons by Building → Area / Room, shows each lesson as a bordered card with the four narrative sections (Preventive Action highlighted in green), and is named lessons-learned-YYYYMMDD.pdf.

> Tip: For closeout, generate the full export once unfiltered for the master binder, then generate a per-building export for each individual building's O&M package.

16. Process Flowcharts

The Process Flows page is for drawing step-by-step diagrams — commissioning sequences, escalation paths, inspection routines, or any 'if this, then that' procedure. Build as many as you want, edit them anytime, and export each one as a one-page PDF for the closeout binder or training package.

Two Ways to Start

1. New Flowchart — starts you with a small example diagram (Start, Step, Decision, End) you can edit.
2. Import from Picture / PDF — upload a picture or PDF of an existing flowchart and AI converts it into an editable diagram. Usually 10–30 seconds. Always review and clean up the result.

The Editor

The page is split: on the left, a Name, Description, and a big text box with the flowchart source code. On the right, a live preview that updates as you type. A small red message appears at the top of the preview if your syntax has a typo.

Editing Patterns

A[Do something] — a regular step (rectangle).
A([Start]) — a start or end shape (rounded).
A{Decision?} — a yes/no question (diamond).
A --> B — arrow from A to B.
A -->|Yes| B — labeled arrow (use this for the Yes / No branches of a decision).

Click the Syntax help button on the editor page anytime to see a complete example you can copy.

Showing Roles / Responsibilities

To show WHO is responsible for each part of the flow (PM, QA/QC, Foreman, Subcontractor, Owner, etc.), wrap those steps in a subgraph block. Each subgraph becomes a labeled box around its steps, like a swimlane. Example:

```
subgraph PM["Project Manager"]
  A[Issue PO]
end
subgraph QA["QA / QC"]
  B[Inspect material]
end
A --> B
```

Rules: the subgraph ID is alphanumeric only (no spaces); the visible name goes in ["..."]; define all the connecting arrows AFTER the end of every subgraph. When importing from a picture, fill in the Roles / Responsibilities field on the import dialog so the AI groups the steps for you.

Saving and Exporting

Click Save often. The line under the title shows when you last saved.

Click Export PDF to save the latest edits and download a one-page PDF named after the flowchart, e.g. commissioning-sequence-YYYYMMDD.pdf. Orientation is chosen automatically based on the diagram shape.

> Tip: build a small library of standard flows (FOK submittal, Punch list closeout, Material receiving) and export them all together for the project closeout binder.

17. Specifications Reference

The Specifications page is your project's spec library. Specs are PDFs that get indexed for searching and answering questions.

Importing PDFs

Click Import PDFs and select one or more files. The system reads each PDF, detects the spec number from the filename or first page, auto-assigns a CSI category (e.g. Division 26 = Electrical), and indexes the full text so it can be searched.

Smart Search

Type in the search bar to instantly filter specs across title, spec number, category, description, keywords, and notes. Use the Category dropdown to narrow further. Toggle between Card View and Table View.

Ask a Question (AI Search)

Click the Ask a Question bar to expand the AI assistant. Type a natural-language question (e.g. 'What is the max support distance for ladder rack?'). The system searches inside the actual PDF text for the most relevant sections and uses an AI model to give you a precise, cited answer. Click the spec link below the answer to open the source PDF — the viewer scrolls to the right page and highlights the key facts.

Bulk Delete (Select Mode)

1. Click Select in the upper right. A checkbox appears on each spec card.
2. Tick the specs to remove (or use the select-all checkbox).
3. Click Delete Selected (N) and confirm.

18. ACC Forms (Autodesk Construction Cloud)

The ACC Forms page lets the tracker talk to Autodesk Construction Cloud so the form numbers and links you fill in here can be matched up with the actual forms in ACC. If your project doesn't use ACC, you can ignore this page.

One-Time Setup

1. Go to ACC Forms → Settings.

2. Click Add ACC Account. Enter the account name, Client ID, Client Secret, Hub ID, and Project ID from your ACC administrator.
3. Click Save, then Test Connection. A green check means the credentials work.
4. Pick the form templates in ACC that match your inspection types (L2, L3-ISP, L3-OSP, L4, L5, FOK).

Linking a Building to an ACC Account

On the ACC Settings page, find the building in the list, pick the ACC account from the dropdown next to it, and click Assign. This is only needed if you have more than one ACC project.

> You don't need ACC to use the tracker. Everything works with manual form numbers and pasted URLs — ACC just removes the manual paste step.

19. 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.