

Contents

Drawing Categories	2
Adding Drawings.....	2
Statuses	3
Archive.....	5
Change Requests	5
Transmittals.....	6
Admin	7

Drawing Categories

- You may wish to allocate your drawings to a project, discipline, department, client, region or some other custom category. The default name for the categories is **Projects**, but you have full control over what this category is called. You can change the category name anytime by clicking **Admin** on the left menu, then selecting **Configuration**. Towards the bottom of the configuration page you can change the name of your drawing categories.
- You can create Projects at any time and you can have as many as you desire. Each Project has a number field, a name field and a notes field. You can use these how you wish. A number and a name are required.
- Once you have set up your Projects, you can add and edit your drawings and select the Project from the dropdown list. This will link the drawing record to the specified Project.
- When you click on the Project in the Project List, you should see the details of the Project and also a list of all the drawings that have been associated with the Project. From here you can **Print** the page, download an **excel list** of the drawings and download a **zip file** of the drawings.
- When looking for drawings in the Drawing List, you can search by Project number. When adding drawings to a transmittal or a change request, you can also search by Project number.
- Using the Project section is **optional**, you can continue to use the system and just keep your drawings in the main drawing area without allocating them to Projects.

Adding Drawings

- You can upload any type of electronic file to the drawing register.
- The file size limit for uploads is **24 MB**, if you attempt to upload a file larger than this it will most likely fail.
- While any file can be uploaded most file types will not open in your browser. When you click the link to view or access the drawing file you will be prompted to download the file.

- If you upload **PDF** copies of your drawings they will display in the browser, and you won't be prompted to download the file. This is the recommended method of storing drawings in the register for viewing.
- When adding a new drawing you need to manually enter all the details, no information is automatically generated.

Statuses

- Drawings in the register can be at various statuses, they are;
 - **For checking** – a brand new drawing requiring a check for correctness, formatting and accuracy
 - **Checked** – a successfully checked drawing waiting approval
 - **Marked up** – a marked up version of a drawing that failed checking
 - **Approved** – a drawing successfully checked and approved
 - **Reserved** – a drawing number that is going to be allocated in the future
 - **Superseded** – a drawing retained for information purposes but not to be used
- The system allows you to process and progress drawings through the above statuses automatically, or you can assign the various statuses manually.
- You can use the system to change the statuses by clicking the links under **Change Status** on the **General Drawing Details** Page. You can view the 'General Drawing Details' page by clicking on the drawing number or the drawing title.
- **For checking** – when you upload a new drawing for checking an A gets added to the revision number, this suffix will increment through the alphabet if the revision has a series of passes through the 'for checking' → changes 'marked up' process. Each copy of the drawing either with marked up changes required or a new copy re-submitted for checking after the changes will be added to the Archive. When a drawing is at this status the options to change the status through the system are 'Checked OK' or 'Changes Required'. Any user can check a drawing.

- **Checked** – once the drawing has been successfully ‘Checked OK’, after one or more passes through the for checking process it will be set to the status Checked. The user will be prompted to enter their name, which will appear as a water mark on the drawing if it is a PDF. When a drawing is at the status of Checked, it can be returned to a status of ‘For checking’ if a problem is identified. When a drawing is at the ‘Checked’ status the options to change the status through the system are ‘For Re-Checking’ or ‘Approved’.
- **Marked up** – when a drawing is at the status of ‘Marked up’, it means a copy of the drawing that was checked has been uploaded with annotations or mark-up showing what needs correcting before it can pass the checking process. The user that is to make the changes can view a copy of the drawing with the mark-up by clicking on the ‘Electronic Location’. Drawings at this status have an M added to their revision as a suffix. Copies of these drawings are also retained in the archive. This provides a complete picture of what was to be checked, what was identified as requiring correction and what was submitted for re-checking.
- **Approved** – When a drawing at the status of Approved is authorised for release it should be progressed to the status Approved. This means the drawings can be sent out on transmittals with a designation of ‘For Construction’, and the drawing should be considered the most current version of the drawing. Once a drawing is at the status of Approved, there are no more options to progress the drawing automatically.
- A user with an access level of 3 or above can approve drawings.
- **Reserved** – When you are creating a set of drawings and you’d like to ensure the numbers are adjacent you should add a new drawing with as much information as you can and set the status to reserved. This will ensure other users do not take a drawing number you intend to use while you are creating the drawings, when you have multiple users adding new drawings to the system.
- **Superseded** – When you have a drawing that is still the most current revision of the drawing and you wish to keep it for historical or information purposes, but there is a more up to date drawing with another number, you should set the older drawing to the status

Superseded. This allows you to retain the drawing but let everybody know it has been superseded by another drawing. This differs to the revision history, which is the evolution of the individual drawing with the same number at each change. It is useful to manually annotate “Superseded by drawing X” on the PDF file before upload.

Archive

- The **Archive** section is for old revisions of current drawings. If the drawing was processed through the system status changes outlined in the Statuses section you should have a series of drawing added to the Archive section automatically to reflect the evolution of the drawing through this process.
- You can manually update an approved drawing when a new revision is required. You can do this from the Archive section by clicking on the green ‘New Record’ button at the top of the page.
- You will be prompted to choose an individual drawing or choose a Project to see a list of drawings to choose from.
- You will then be prompted to enter the details of the new revision, its status, a change request and/or a text description of what has changed and why.
- When the submit button is clicked the existing current revisions is added to the archive and the new revisions is added to the drawings table at the chosen status.

Change Requests

- If you wish to keep the details of the changes that are made in a new drawing revision you can use the optional **Change Request** system.
- A change request is a record detailing what the changes are, why they are needed, who submitted the request and who approved the changes. A change request can affect one or more drawings and the drawings will be linked to the change request record.
- When a new change request is submitted it is emailed to a user for approval. The user should login to the DWG Register and navigate to the Change request area to view the details of the request and either approve or reject the request.

- Once a request is approved it should then be the instigator for updating a drawing and creating a new revision.
- Users with an access level of 2 or more can approve, reject and mark change requests as completed.
- Once the changes have actually been made the change request can be updated again to mark it as completed.
- Change requests should not be deleted but if a mistake/duplication was made a user with an access level of 3 can delete a change request.
- If you do not want to use the formal change request system you will need to include some details when you are creating a new revision of a drawing explaining what the changes are.

Transmittals

- Drawings in the drawing register should never be sent out manually. It is best practice to distribute drawings on a drawing **Transmittal**. This allows you to keep a historical record of every time the drawing has been distributed including who sent it, who received it and why it was sent. It also keeps a record of exactly which revision was sent in the event of a dispute with a manufactured/constructed part.
- To send a transmittal to someone they need to be listed in the Recipients section of the Transmittals area.
- Anyone with access to the system can add a new recipient.
- A user with an access level of 2 or more can edit a recipient.
- A user with an access level of 3 or more can delete a recipient. It is generally not a good idea to delete recipients that have been sent transmittals, this will orphan the transmittal records, and it will look like the transmittal was sent to no-one.
- You can send any drawings in the register out on a transmittal, except if you mark the transmittal as 'For construction' all drawings have to be approved.
- Once a transmittal is created it will be listed in the transmittals table waiting for further action.

- You can send the transmittal via email, which is the best option. This will mark the transmittal as sent, marking the time and date it was sent. The transmittal originator will be copied in to the transmittal and at the time of sending you can specify additional email addresses that should also get a copy of the transmittal.
- When you receive an acknowledgement back from the other party you should return to the transmittal record in the drawing register and click 'Acknowledge' this will add the time and date that you clicked the 'Acknowledge' link.

Admin

- The **Admin** area is where you manage your users who need access to the system.
- Each user will have their own login details to access the system which they should not share with anyone else.
- To add a new user, click on the 'Add New User' link and enter their details.
- The email address is important as it is used during change requests and as the reply to address for any transmittals they send.
- The login details they should use to access the system are in the Username: and Password: fields.
- The user should access the system through the link to your account at [https://dwgregister.com/?\[account\]](https://dwgregister.com/?[account]) where **[account]** is the account name you chose when signing up.
- You can change their username and password at any time, which will not affect the historical user records in the system.
- If you wish to remove a user from the system temporarily, you should not delete them. Instead you can give them an access level of 0, which will stop them from logging in. At a later date you can restore their access by changing this to 1 or above.
- Users with an Access level of 4 can access the Admin area and change anyone's login details. Access level 4 should only be granted to a select few trusted administrators.

Please contact us at support@dwgregister.com if you need any further help.