

Romac Drawing Log

Version 0.0

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OPERATOR'S MANUAL

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Installation

Romac Series 7 Fabrication Package is a multi-user application and can be installed on a standalone computer, as a single-user application on a computer attached to a network, or can be installed on several computers attached to a Windows network.

System Requirements

Operating System - Windows 95, 98, ME, NT4.0, 2000, and XP Professional

Network – Windows peer to peer or data files can reside on Windows Server. A network is optional as the program can be run on a single computer.

System memory – The programs should run on systems with the minimum amount of memory recommended for the operating system but at least 256 meg of memory. If you think your system may have a marginal amount of memory in which to run the program, try running the program with the marginal memory then buy additional memory only if necessary.

Hard disk space – Varies depending on the size and quantities of projects stored on the system.

Monitor screen resolution – Minimum screen resolution is 1024 x 768.

The installation CD consists of two setup programs. DLDataSetup.exe installs the data files. DLSetup.exe installs the Drawing Log program.

Single User installation (without network)

If installing onto a single computer not attached to a network, all setup programs would of course be run on that single computer. In this case we recommend that the default installation and folder names be used. Using installation defaults, data folders and files will be located as follows:

C:\Romac7\DLData – Contains all Drawing Log data files

C:\Program Files\Romac – Contains program files for all applications.

When installing onto a single user, first run DLDataSetup.exe then DLSetup.exe. After installation, see “Linking programs to data files” below.

Single User installation (with network)

If installing a single user onto a computer connected to a network, you have two installation options. You can install everything onto a single computer as outlined above or you can install the data files onto one computer and the program files onto a separate computer similar to the network installation described below. The advantage to separating programs and data is that data files can be stored on a computer that has a regular backup routine. In either case, a frequent backup routine should be implemented.

Network installation

When installing onto a network with two or more users accessing the data files, the data files should be installed onto a single computer which can be accessed by all users. The program files must be installed onto each individual computer. The computer containing the data files can also contain program files and be used to access the data.

The data files should be installed first. Run DLDataSetup.exe on the computer which you will be storing data. The setup program is designed to create folders Romac7 and Romac7\DLData. We recommend that you maintain this folder naming and structure. This makes it easier for troubleshooting and keeps all your data files together for simpler backups and restore. Romac7 can be placed in the root directory on the data drive or it can be placed in a subfolder. In any case, all users must have full read/write/create/delete rights for the Romac7 folder and all subfolders.

After data files are installed, the Drawing Log program should be installed onto each computer that will be running the application. Installation program is DLSetup.exe.

Once installed, the application can be run by accessing Programs | Romac Applications from the Windows Start menu.

Linking programs to data files

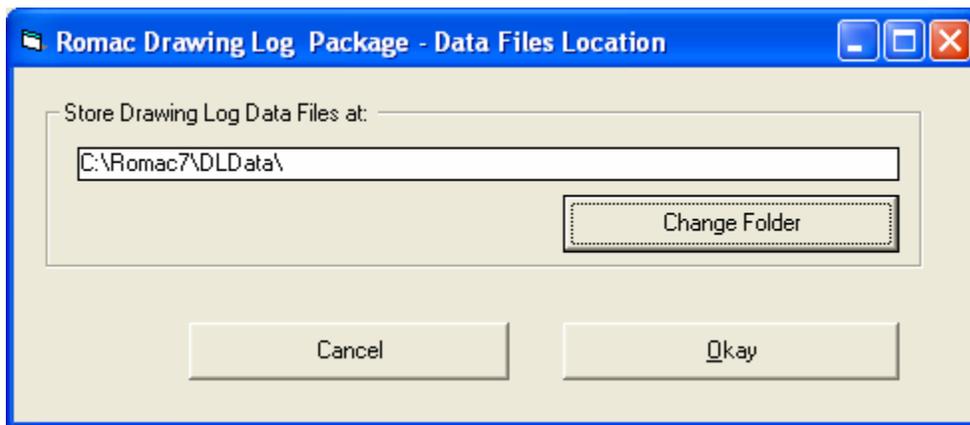
Before the Drawing Log application can be used, the installed program must be linked to the data files location. Upon initial startup, a screen will be displayed to allow you to browse to the data files location. This data files location will be the location files installed with DLDataSetup.exe were installed to.

Each of the applications will need to be linked to the “Fabrication Package Data Files” location plus the location of its own data files.

Using the default installation, these locations will be:

Drawing Log data files -\\Romac7\\DLData\

This option can also be accessed using the menu chain Maintenance | Set Configuration | Data Files Location.



The drawing log data folder must contain the files DLDBMst.mdb and DLDB100.mdb. These files will be created when the DLDataSetup.exe installation program is run. . Whenever a new drawing log project is added to the system, a new project specific subfolder will be created in the drawing log data folder. The user(s) must have access permissions to create, update and delete files and folders in the data folder and any subfolders created by the drawing log program

Start Up

If the default installation was used; click the Start button, then click on 'Programs', next click 'Romac Applications' and finally click Romac application you wish to run.

Software Purchase and Registration

Upon installation of this software, you will be given a 45-day evaluation period which gives you access to most program features.

You may purchase and register the software at any time during or after the evaluation period. Each registration gives you a license to use a single installation of the software in accordance with the Software License Agreement and Limited Warranty.

Each installation will generate a different serial number. This serial number is required for registration. The serial number will be included on the printed registration form (see Maintenance | Software Registration | Print Registration Form) in each application. The serial number is also available at the Help | About dialog box.

Registration numbers can be entered at the Maintenance | Software Registration | Enter Registration Numbers menu option.

General Program User Interface

The Romac applications generally follow the guidelines published by Microsoft for the user interface. A basic knowledge of the common Windows user interface should be enough to use the programs features.

One deviation from the Windows standard is that our applications can use the ENTER key in addition to the TAB key to exit a data entry field.

Menu Structure Summary

File

- New Project
- Open Project
- Delete Project
- Exit

Edit

- Project Title
- Add Drawings
- Edit Drawings
- Display Drawings
- Add/Edit Companies

Transmittals

- New Drawing Transmittal
- Issue Drawings for Approval
- Update Approval Return
- View/Print Existing Transmittal

Reports

- View/Print Existing Transmittal
- Print Basic Report
- Print ... Report

Maintenance

- Edit Companies
 - Master Companies
 - Project Companies
- Edit Drawing Types
 - Master Drawing Types
 - Project Drawing Types
- Edit Transmittal Codes
 - Master Transmittal Codes
 - Project Transmittal Codes
- Edit Approval Return Codes
 - Master Approval Return Codes
 - Project Approval Return Codes
- Edit Report Formats
- Set Configuration
 - Miscellaneous
 - Data Files Location
- Software Registration
 - Print Registration Form
 - Enter Registration Number

Help

- Contents
- About

Menu Options Overview

File

New Project

This option is used to create a new drawing log project. A unique job number identifies each project. This job number must be a combination of alpha (A through Z), numeric (0 through 9), or the hyphen characters and can be up to 6 characters in length. Data for an individual project is stored in a single folder (or directory). The folder name will be the job number preceded by "DM_" (such as DM_999 or DM_A-999).

Open Project

This allows you to open and log in an existing project.

Delete Project

Once deleted, there is no reliable method to recover the data other than using an archive or backup copy you had made. It is strongly recommended that you make a daily backup of your data files. Also, prior to deleting a drawing log project, you may want to make an archive copy onto a CD or some other media.

Exit

You can exit the program using this option or by closing the window.

Edit

Project Title

Basic project information such as customer name, project location, etc. is entered using this option.

Add Drawings

Drawings are added to the project using this option. See the separate section for drawing entry specifics.

Edit Drawings

Drawing data can be edited (or an entire drawing can be deleted) using this option. Drawing revision data can be updated using this option. Also, individual drawings can be noted as 'returned from approval' using this option.

Display Drawings

Data relating to an individual drawing can be displayed using this option. Available data includes revision history, approval issue/return history and drawing distribution history.

Add/Edit Companies

This option allows you to enter or edit the company data for companies associated with this project. The menu option Maintenance | Edit Companies can also be used to update the same information.

Transmittals

New Drawing Transmittal

This option is used to create a new Letter of Transmittal for all drawing distributions except approval issues. Transmittal letters for drawings issued for approval are created using the "Issue Drawings for Approval" menu option. This option can be used to distribute drawings to any company associated with this project.

Issue Drawings for Approval

This option is used to create a new Letter of Transmittal for approval issues. The transmittal will be addressed to the company noted as the approver company. The approver company is set using the Edit Companies menu option.

Update Approval Return

This option is used to denote drawings that have been returned from approval.

View/Print Existing Transmittal

An existing Letter of Transmittal can be viewed on the screen or printed using this option.

Reports

The reports are designed to print to Windows printers using the Courier New font. Reports will adjust the font size to fit the sheet width using the nearest available size font. If the font size chosen by the program results in a report with characters too small to read, you can change the report to print in landscape mode or in some cases, the report criterion allows exclusion of certain columns in the printout.

Reports will print to the default printer device using the default orientation (portrait or landscape). To print to a printer (or orientation) other than the system default, you have two choices. The system default printer can be changed from the Windows desktop or the printer can be changed from within the program.

To change the selected printer from within the program, after selecting the report to print, click the "Printer Setup" button. The printer you selected will then be used for all subsequent reports printed from that application until you change the selected printer or exit the application. However, the orientation will revert back to the printer's default after each report is printed.

View/Print Existing Transmittal

An existing Letter of Transmittal can be viewed on the screen or printed using this option.

Print Basic Report

Each project will have a basic report defined. Report columns for the basic report include Drawing Number, Made By, Checked By, Revision and Drawing Issue/Return. Additional report can be defined by the user through the Maintenance | Edit Report Formats menu option. All user defined reports are specific to a single Drawing Log project.

Maintenance

Edit Companies

Master Companies

Project Companies

A database of companies is maintained. The company database includes mailing and shipping addresses, contacts and phone numbers. A separate company database is maintained for each project along with a master database of companies. Company data can be copied between the project and master databases. This allows you to save company data in the master database then have it available to copy to the project whenever a new project is added to the system.

Edit Drawing Types

Master Drawing Types

Project Drawing Types

Multiple drawing types (such as erection drawing, shop drawing, design drawing etc.) can be set up. Each type specifies the data that is kept for that drawing type such as made by, checked by, data fields, etc. Whenever drawings are added to the system, a drawing type must be assigned to the drawing. When a new project is created, the master drawing types are automatically copied to the project. Edits to master drawing types do not affect existing projects.

Edit Transmittal Codes

Master Transmittal Codes

Project Transmittal Codes

A list of valid transmittal codes such as 'For Approval', 'Reference Only', 'For Shop Use', etc. is maintained. Each distribution or approval issue must have one of the valid transmittal codes assigned to each drawing in the transmittal. When a new project is created, the master transmittal codes are automatically copied to the project. Edits to master transmittal codes do not affect existing projects.

Edit Approval Return Codes

Master Approval Return Codes

Project Approval Return Codes

A list of valid approval return codes such as 'Approved as Submitted', 'Approved as Noted', etc. is maintained. Each drawing returned from approval must have one of the valid approval return codes assigned. When a new project is created, the master approval return codes are automatically copied to the project. Edits to master approval return codes do not affect existing projects.

Edit Report Formats

Each project will have a basic report defined. Report columns for the basic report include Drawing Number, Made By, Checked By, Revision and Drawing Issue/Return. Additional report formats can be defined by the user. All user defined reports are specific to a single Drawing Log project.

Set Configuration

Miscellaneous

This option allows you to enter your company name and address. The company address is included on the printed letter of transmittal report. This option is also used to enter transmittal numbering method and transmittal 'copy to' defaults.

Data Files Location

Used to specify the location for Drawing Log data files.

Software Registration

Print Registration Form

Enter Registration Number

Help

Contents

On line help files.

About

Displays information showing program version, license status, program serial number, and contact information.

Operator's Guide

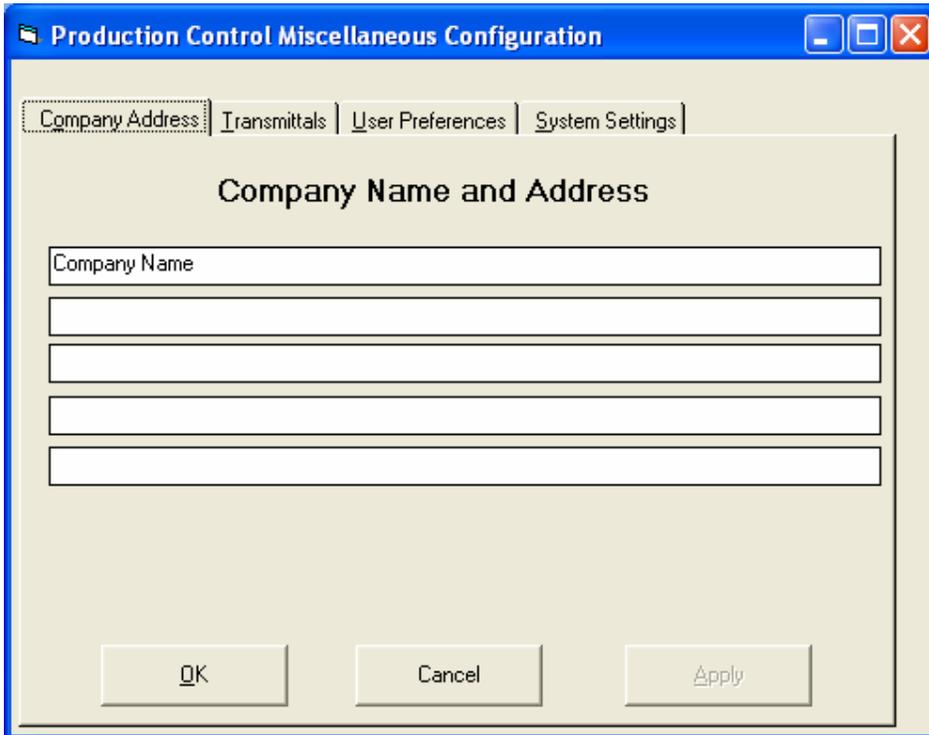
The Operator's Guide is arranged in the basic sequence you would follow in setting up the program and then creating and updating a project.

After installing the program and data files and linking the installed program to the data files location, you should review the master Drawing Types, Transmittal Codes and Approval Return Codes. If any changes or additions are required for these tables, you can make those changes prior to adding any projects to the system. A copy of these tables will be added to new projects where project specific changes to the tables would then be made within the project.

A master list of companies is maintained. When a new project is created, the company data can be transferred to the project (if the company had been previously added to the master database). In practice, you probably would want to add new companies to the project database then transferred to the master database for future use.

Your Company Name/Address

Use the menu option Maintenance | Set Configuration | Miscellaneous then click the Company Address tab to enter your company name and address. This is used as the return address on your letters of transmittal.



Production Control Miscellaneous Configuration

Company Address | Transmittals | User Preferences | System Settings

Company Name and Address

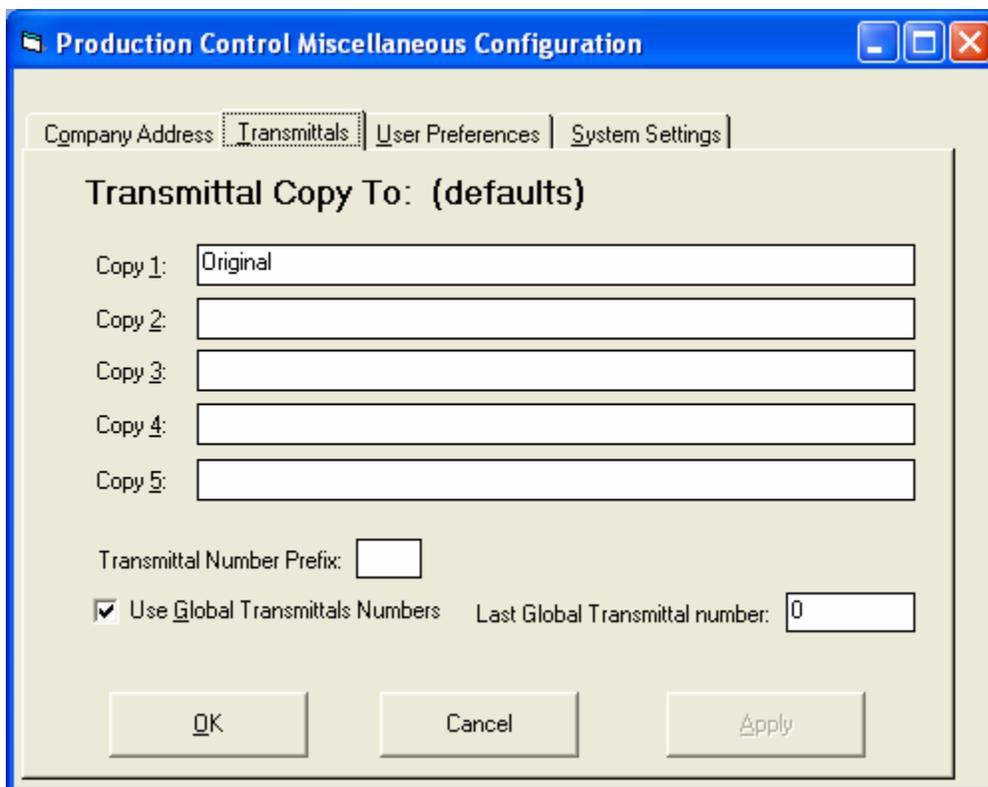
Company Name

OK Cancel Apply

Letter of Transmittal Numbering and Print Copies

When printing a letter of transmittal, you can print multiple copies (up to 5) of the letter and denote a different 'copy to' at the bottom of each copy. The default setting for this can be entered at the Miscellaneous Configuration screen. Note that the default setting can be changed whenever printing an individual letter.

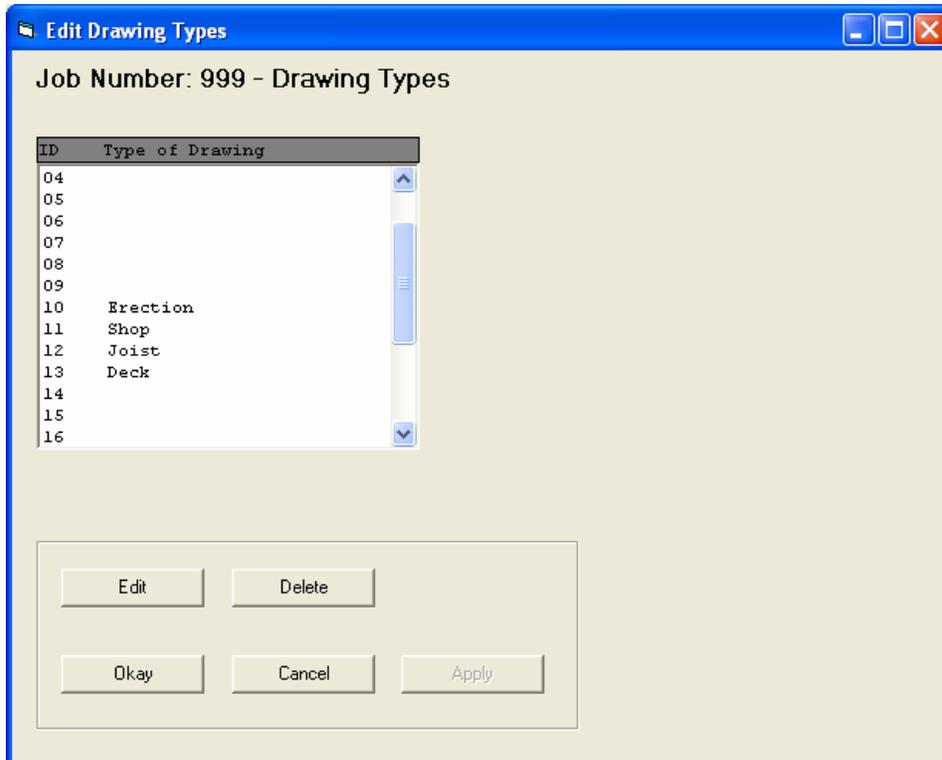
The numbering method for letters of transmittals can be set to assign a unique number to each letter of transmittal regardless of project (Global) or the method can be set to start numbers at 1 for each project. If the global method is chosen, you can designate the starting letter of transmittal number. With either numbering method, a 1 or 2 character prefix can be specified for transmittal numbers.



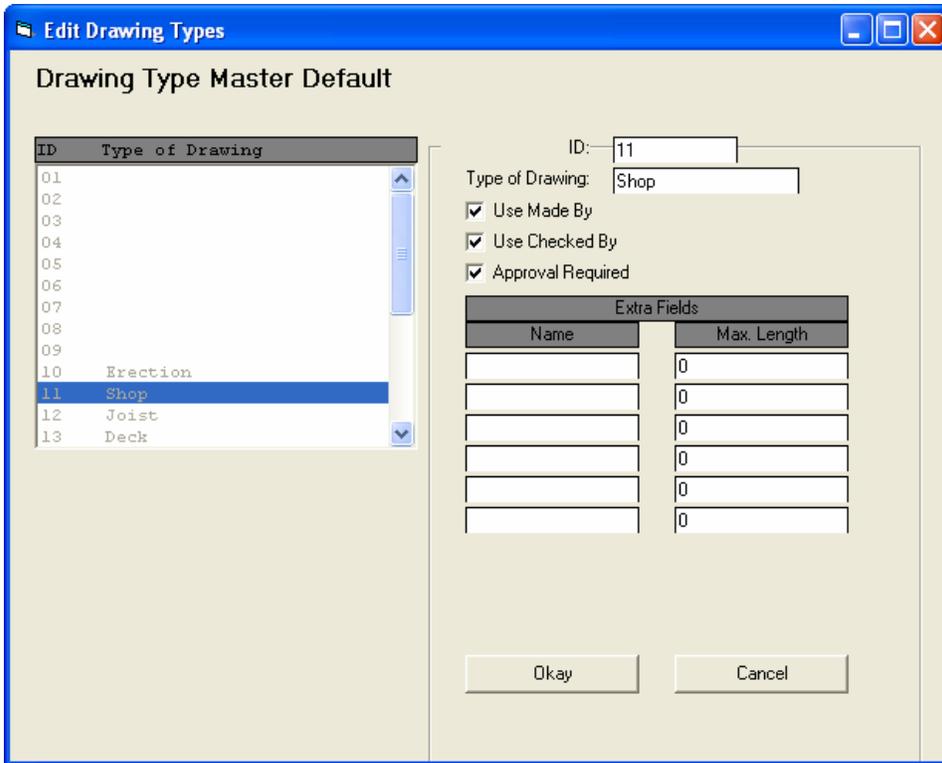
The image shows a screenshot of a software dialog box titled "Production Control Miscellaneous Configuration". The dialog has a blue title bar with standard window controls (minimize, maximize, close). Below the title bar, there are four tabs: "Company Address", "Transmittals", "User Preferences", and "System Settings". The "Transmittals" tab is currently selected. The main content area is titled "Transmittal Copy To: (defaults)". It contains five text input fields labeled "Copy 1:", "Copy 2:", "Copy 3:", "Copy 4:", and "Copy 5:". The "Copy 1:" field contains the text "Original". Below these fields, there is a "Transmittal Number Prefix:" label followed by an empty text input field. Further down, there is a checked checkbox labeled "Use Global Transmittals Numbers" and a "Last Global Transmittal number:" label followed by a text input field containing the value "0". At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Apply".

Drawing Types

Multiple drawing types (such as erection drawing, shop drawing, design drawing etc.) can be set up. Each type specifies the data that is kept for that drawing type such as made by, checked by, data fields, etc. Drawing Types are revised using the Maintenance | Edit Drawing Types menu option. The Master Drawing Types are used to initialize a new project. Changes to the master drawing types will not affect any existing projects; changes to the project drawing type will not affect the master drawing types or any other project drawing types.



Up to 24 different drawing types can be used. To add a drawing type, highlight an unused ID then click Edit. You can also Edit or Delete an existing drawing type.



In addition to the drawing type's name, you can specify if 'Made By' or 'Checked By' is used for the drawing type. If the drawing type requires approval, this box should be checked. All drawing will have a 'Revision Number' and 'Revision Date' field.

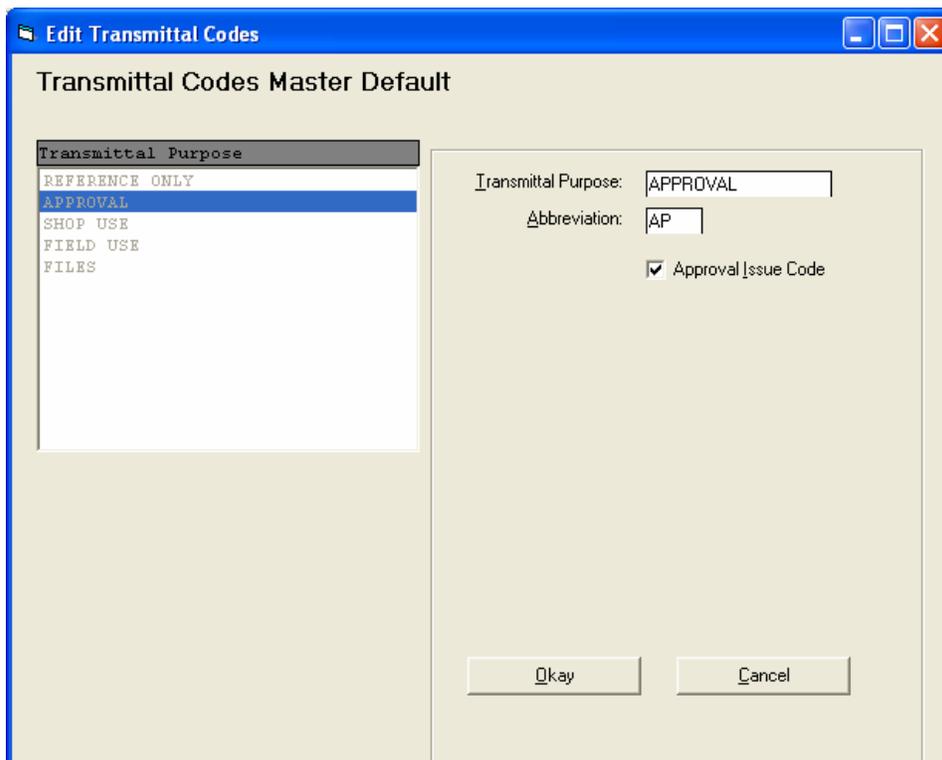
Up to six extra data fields can be specified for each drawing type. You can specify the maximum length of each extra field up to 22 characters. To delete an existing extra field, change the maximum length to 0.

Once drawings have been entered into a project for a drawing type, the drawing type's name cannot be changed or extra fields cannot be deleted or shortened. The 'Made By' and 'Checked By' requirement can be changed but any data entered into those fields will not be deleted.

Drawings will be listed on all transmittals and reports by drawing type ID order. All drawings of a single drawing type will be grouped together and sorted by drawing number within that drawing type.

Transmittal Codes

A list of valid transmittal codes such as 'For Approval', 'Reference Only', 'For Shop Use', etc. is maintained. Each distribution or approval issue must have one of the valid transmittal codes assigned to each drawing in the transmittal. When a new project is created, the master transmittal codes are automatically copied to the project. Edits to master transmittal codes do not affect existing projects. There is not a limit to the number of transmittal codes allowed.



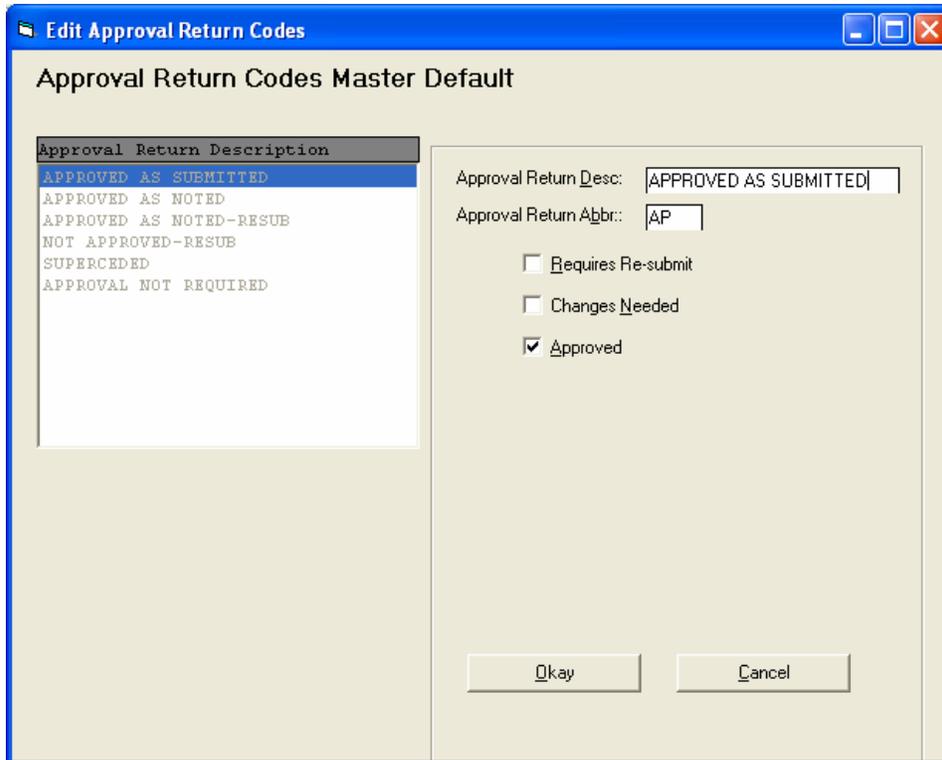
Use the Maintenance | Edit Transmittal Codes menu option to update transmittal codes.

The abbreviation is used on the reports to minimize column widths.

If the transmittal purpose is for approval, that box should be checked. This will alert the system that the drawings submitted for approval using this transmittal code will require approval return.

Approval Return Codes

A list of valid approval return codes such as 'Approved as Submitted', 'Approved as Noted', etc. is maintained. Each drawing returned from approval must have one of the valid approval return codes assigned. When a new project is created, the master approval return codes are automatically copied to the project. Edits to master approval return codes do not affect existing projects. There is not a limit to the number of approval return codes allowed.



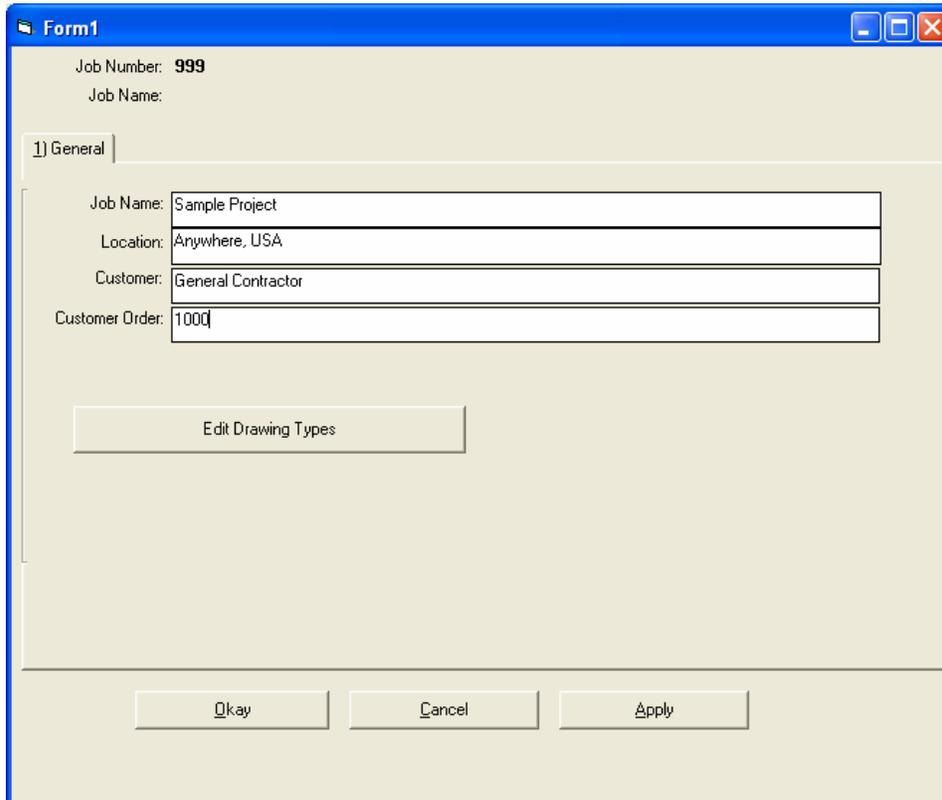
Use the Maintenance | Edit Approval Return Codes menu option to update approval return codes.

The abbreviation is used on the reports to minimize column widths.

A drawing returned from approval is marked in the system as approved, not approved or conditionally approved. For a return code, if the 'Approved' box is not checked, the returned drawing is marked as not approved. If the 'Approved' box and either (or both) the 'Requires Re-submit' or 'Changes Needed' box is checked, the returned drawing is marked as conditionally approved. If the 'Approved' box is checked and neither of the other boxes is checked, the returned drawing is marked as approved.

New projects

Select the File | New Project menu option to create a new project. The project job number can be up to six characters in length. Basic project data consisting of Job Name, Location, Customer Name and Customer Order Number is entered on the job title general screen.



The screenshot shows a software window titled "Form1" with a blue title bar. The main area is light beige. At the top, it displays "Job Number: 999" and "Job Name:". Below this is a tabbed interface with a tab labeled "1] General". Under the "General" tab, there are four text input fields: "Job Name:" containing "Sample Project", "Location:" containing "Anywhere, USA", "Customer:" containing "General Contractor", and "Customer Order:" containing "1000". Below these fields is a button labeled "Edit Drawing Types". At the bottom of the window, there are three buttons: "Okay", "Cancel", and "Apply".

Project Companies

All companies receiving drawing distributions or approval issues must be added to the project's company database. Companies are added to the project database using the Maintenance | Edit Companies | Project Companies menu option.

A separate company database is maintained for each project in addition to a master company database. The master database is maintained to store company data for possible use in future projects. Companies can be transferred between the project and master databases but not directly from one project to another project. Changes in the company data in one database do not affect any other database.

Enter/Edit Company Information
Job Number: 999 Companies Database

Company Name: Romac Computer Services, Inc.
 Company Type: Other
 Phone: 865-426-9634 Fax: 865-426-6454
 Contacts: Roger McCarter, President
 Shipping Address: 332 South Main Street
 Address 2:
 City: Lake City State: TN Postal Code: 37769
 Country: USA
 Mailing Address Same As Shipping Address Cannot Receive Mail
 Mailing Address: P. O. Box 660
 Address 2:
 City: Lake City State: tn Postal Code: 37769
 Country: USA

Buttons: Add, Save, Cancel, Delete, Edit, Transfer Master <> Job, Assign Drawings Approver, Close

Basic information entered for each company includes the shipping and mailing address (if different from the shipping address), main phone and fax numbers and company contacts. The company type is used to segregate companies for easier lookup. If the company cannot receive USPS mail at that location (such as a jobsite without a mailbox), the 'Cannot Receive Mail' box should be checked.

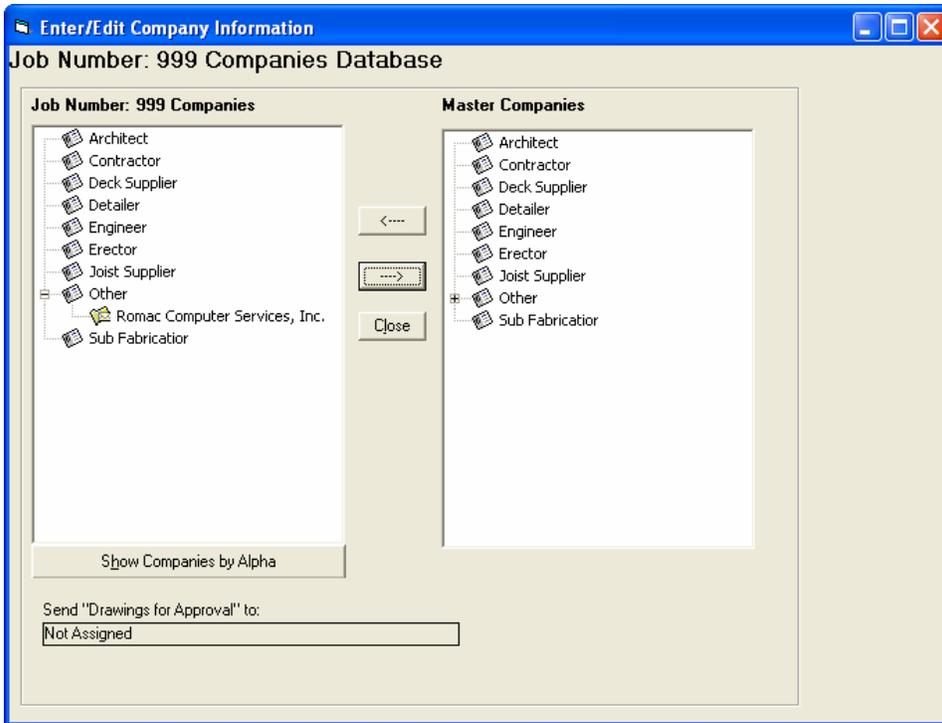
Several contact individuals can be entered for each company.

Edit Contact Information
Master Companies Database
Company Name: Romac Computer Services, Inc.

Contact Name: Roger McCarter
 Title: President
 Phone: 865-426-9634 Ext:
 Fax: 865-426-6454
 Cell:
 E-mail: romac@romacinc.com

Buttons: Okay, Cancel

When editing project companies, the 'Transfer Master to Job' button allows you to transfer company data between the master and project databases. To transfer data, highlight the company name in either the master or project database then click the arrow to transfer the data. If the identical name exists in the database you are transferring to, you will be given the option to cancel the transfer. Multiple companies with the same company name can exist in a database.



Assign Drawing Approver

Before project drawings can be sent for approval, a drawing approver must be selected from the list of project companies. To do so, highlight a company name then click the 'Assign Drawing Approver' button. Only one drawing approver can be selected per project; however drawings can be distributed by letter of transmittal to any company in the project companies database.

Add Project Drawings

To add new drawings to a project, open the project then select the menu option Edit | Add Drawings.

Add New Drawing(s)

Job No: 999, Job Name:

Drawing Type: Shop

Beginning Drawing Number:

Ending Drawing Number:

Made By: Made Date:

Checked By: Checked Date:

Approved: No

Latest Revision Number: Revision Date:

1 - Remark:

Use Auto Ditto

Prompt for Revision Level

Use Drawing Range Entry Method

The drawing type is selected from the listing in drop down box. The balance of the data entry screen is dependent on the drawing type selected. A revision number and date is optional for all drawing types. If the drawing type requires approval, the approval status is required. Some drawing types allow a made entry and/or a checked by entry. Extra data field entries such as remark can included with the drawing data entry.

Drawing data can be entered one drawing at a time or by drawing range. If the drawing range method is used, all data such as made by and date must be the same for all drawings in the range. A check box is provided to turn the drawing range entry method off an on. When entering drawing numbers by range, the ending drawing number can be omitted.

The 'Use Auto Ditto' will ditto the drawing's data entries from one range to the next. When used, you need the re-enter only the data fields that change.

To save a few keystrokes, you can turn off the revision number/date data entry fields.

Other than drawing number, the only required entry is the approval status "No, Conditional, or Yes". You can enter a made date without an entry in the made by field. The checked by/date fields can be blank but if one is used, the other must be used. Also, the revision number/date fields can be blank or both must be used.

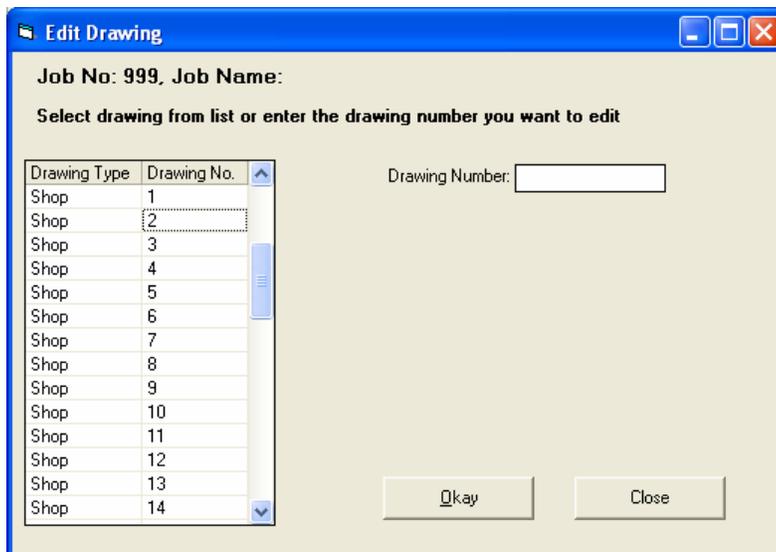
Edit Project Drawing

The menu option Edit | Edit Drawings allows you to revise an existing drawing. Approval Status, Made By/Made Date, Checked By/Checked Date or any of the drawing extra field's data can be changed. Also, you can add a new revision number and date; delete a revision number that has been entered in error or delete an approval return that has been entered in error.

If the drawing has not been distributed through a transmittal letter or issued for approval, the drawing can be deleted. If the drawing has been distributed through a transmittal letter or issued for approval, the drawing can be marked as 'Superseded' but cannot be deleted. Deleted drawings can be added back to the project. Superseded drawings can be returned to active status. Drawings marked as superseded cannot be distributed or issued for approval and will not show up on reports.

Drawing Type cannot be changed.

To select a drawing for edit, click on the drawing number from the listing or enter the drawing number in the box.



Edit Drawing

Job No: 999, Job Name:

Select drawing from list or enter the drawing number you want to edit

Drawing Type	Drawing No.
Shop	1
Shop	2
Shop	3
Shop	4
Shop	5
Shop	6
Shop	7
Shop	8
Shop	9
Shop	10
Shop	11
Shop	12
Shop	13
Shop	14

Drawing Number:

Ok Close

Job No: 999, Job Name: Drawing No: 2

Drawing Type: **No approval issues**

Drawing Number: Approved: Supersede

Made By: Made Date:

Checked By: Checked Date:

1 - Remark:

No drawing distributions

New Rev Number: Rev Date:

Rev. Number	Date
1	1/7/2006

Revisions are sorted by date. The current revision number for a drawing is the revision with the latest date regardless of the revision number. When a drawing is transmitted, the current revision is automatically used as the drawing revision number/date. If a transmitted drawing does not have a revision number entry, the made date is used as the drawing date (if there is a made date entry).

If the drawing requires approval, the approved status for the drawing and the approved status for the last revision (if applicable) will always be the same. Updating the approval status for one will update the status for the other. If a new revision number is added, the drawing's approval status will be updated to the same as the added revision (if the added revision becomes the latest revision). If the drawing approval status is changed, the latest revision's approval status will be updated.

When drawings are returned from approval, the approval status for the revision that was submitted will be updated based on the return status. If the latest revision is still the same as the returned revision, the drawing approval status will also be updated.

The revision history for the drawing is displayed on this screen. If a previous revision has been entered in error, click on the revision then click the delete option to get rid of the revision entry. You can then add the corrected revision. Deleting or changing a revision number or date will not affect any previous transmittal letters.

The drawing's approval issue and distribution history is also displayed on this screen. If there is more than one distribution company or approval issue company, click on the company name to display that company's history.

If a drawing has an incorrect approval return, click on the approval return then click delete.

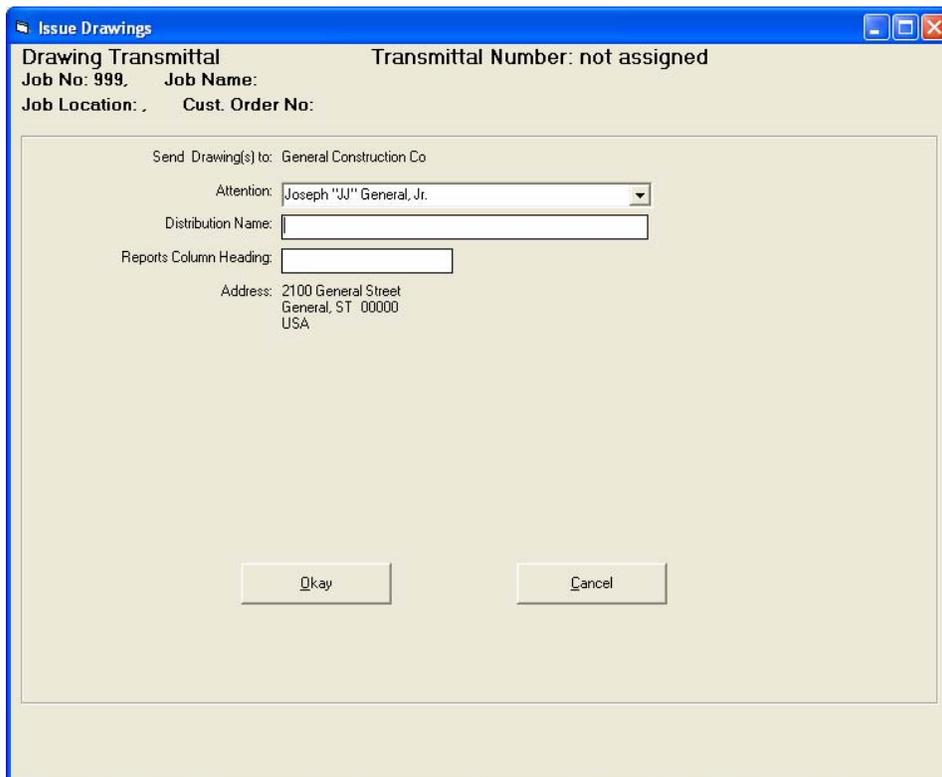
Display Drawings

The menu option Edit | Display Drawings allows you to display data for individual drawings. Drawing selection and display is similar to drawing edit except you are not permitted to change any drawing data.

Distribute Drawings

To distribute drawings by transmittal letter for any purpose other than drawing approval, select the menu option Transmittals | New Drawing Transmittal.

The company to which you will be sending the drawings must have been entered in the project companies database. After selecting the company, you will be presented a screen where you can select the company contact person who will receive the drawings, a Distribution Name and the Report Column Heading. The Distribution Name will be for your own reference. The Report Column Heading will be the column heading listed on the reports.



The screenshot shows a software window titled "Issue Drawings" with a blue title bar. The window content is as follows:

- Header: **Drawing Transmittal** (left) and **Transmittal Number: not assigned** (right)
- Fields: **Job No: 999**, **Job Name:**, **Job Location:**, and **Cust. Order No:**
- Main Content Area:
 - Send Drawing(s) to: General Construction Co
 - Attention: (dropdown menu)
 - Distribution Name:
 - Reports Column Heading:
 - Address: 2100 General Street
General, ST 00000
USA
- Buttons: and

The 'General' tab on the next screen allows you to enter or edit the general information included on the transmittal letter.

Issue Drawings

Drawing Transmittal Transmittal Number: not assigned

Job No: 999 Job Name:
Job Location: Cust. Order No:

General Drawings List

To: General Construction Co
2100 General Street
General, ST 00000
USA

Attention: Joseph "JJ" General, Jr.

Fax Number: 999-999-0000

email:

Transmittal Date: 4/5/2006

We Are Sending You:

Via:

Recipient Proj. Number:

Remark:

Okay Cancel

The 'Drawings List' tab is used to select the drawing numbers to be included on the transmittal letter. The specific drawings to include on the transmittal letter are marked in the list on the right side of the screen. The drawing types list on the left side is used to select the drawing types to show in the specific drawings list.

The Include box must be checked for all drawing types that will be included on the transmittal letter. If only one drawing from that drawing type is to be included on the transmittal, the drawing type Include box must be checked.

The Transmittal Code is the most prevalent code or transmittal purpose for that drawing type. To change the Transmittal Code, click on the field, a list will drop down for you to select the transmittal code.

The Select All box should be checked for all or most of the drawings for that drawing type are to be included in the transmittal. If only a few of the drawings for that drawing type are to be included, leave the box unchecked. The Include box in the specific drawings list will be checked or unchecked depending on the Select All box.

The 'Refresh specific drawings list' button will update the specific drawings list. The specific drawings listing will be overwritten.

Issue Drawings

Drawing Transmittal Transmittal Number: not assigned

Job No: 999 Job Name:

Job Location: Cust. Order No:

General **Drawings List**

Select drawing types to include in transmittal:

Drawing Type	Include	Transmittal Code	Select All
Erection	<input checked="" type="checkbox"/>	FIELD USE	<input checked="" type="checkbox"/>
Shop	<input type="checkbox"/>	REFERENCE ONLY	<input type="checkbox"/>
Joist	<input type="checkbox"/>	REFERENCE ONLY	<input type="checkbox"/>
Deck	<input type="checkbox"/>	REFERENCE ONLY	<input type="checkbox"/>
Design-Arch	<input type="checkbox"/>	REFERENCE ONLY	<input type="checkbox"/>
Design-Struct	<input type="checkbox"/>	REFERENCE ONLY	<input type="checkbox"/>

Refresh specific drawings list

Select specific drawings to include in transmittal:

Drawing Type	Drawing No.	Include	Transmittal Code
Erection	1	<input checked="" type="checkbox"/>	FIELD USE
Erection	2	<input checked="" type="checkbox"/>	FIELD USE
Erection	3	<input checked="" type="checkbox"/>	FIELD USE
Erection	4	<input checked="" type="checkbox"/>	FIELD USE
Erection	5	<input checked="" type="checkbox"/>	FIELD USE
Erection	6	<input checked="" type="checkbox"/>	FIELD USE
Erection	7	<input checked="" type="checkbox"/>	FIELD USE
Erection	8	<input checked="" type="checkbox"/>	FIELD USE
Erection	9	<input checked="" type="checkbox"/>	FIELD USE
Erection	10	<input checked="" type="checkbox"/>	FIELD USE

Okay Cancel

The drawings included on the transmittal can be fine tuned from the specific drawings listing. Click on the box in the Include column to check or uncheck the selection. The transmittal code (or purpose) can be changed by clicking on the transmittal code then selecting from the drop down list.

The drawing date listing on the transmittal will be the latest revision number and date for that drawing. This is based on revision date – not revision number. If the drawing does not have a revision entry, the made date is used. Once a transmittal letter is created, changing the revision number or date does not affect the transmittal letter.

The Okay button will finalize the transmittal letter and allow you to print it. Note that a transmittal letter without a drawings list can be created.

At this point the transmittal number will be assigned and you will have the option to print the transmittal letter. You can also delete the transmittal now or later. If deleted, the transmittal number will remain but the drawing listing will be erased from the transmittal and the drawing files will be updated to remove references to this transmittal.

Issue Drawings for Approval

Creating a transmittal letter for drawings issued for approval is similar to the 'Distribute Drawings' process described above. You must pre-select the 'Drawing Approver' company using the Maintenance | Edit Companies | Project Companies. This is a one time selection that remains in effect until changed.

Use the menu option Transmittals | Issue Drawings for Approval.

Drawings issued for approval should be noted in the system when the drawings are returned from approval.

The menu option Transmittals | View/Print Existing Transmittal can be used to view an existing transmittal or re-print it at any time.

Note Drawings Returned from Approval

When drawings are returned from approval, the return status should be noted using the menu option Transmittals | Update Approval Return.

The first Update Approval Returns screen will prompt you for the return date and the return status for the majority of the returned drawings. The return status for individual drawings in the returned batch can be selected from the available Approval Return Codes for the project. You can choose to update drawing returns from a single drawing transmittal or you can enter a random list of drawings being returned from approval.

Update Approval Returns

Job No: 999, Job Name:
Job Location: ., Cust. Order No:

Update Approval Returns

Approval Return Date: 1/8/2006
Approval Return Status: **Varies**

- Varies
- APPROVED AS SUBMITTED
- APPROVED AS NOTED
- APPROVED AS NOTED-RESUB
- NOT APPROVED-RESUB
- SUPERCEDED
- APPROVAL NOT REQUIRED

Update from previous Approval Issue Transmittal
Update from manual entry
Cancel

If updating approval returns from a single transmittal, a list of all drawings from that transmittal that have not been previously marked as returned from approval will be displayed. You will then select the approval return status (or note 'not returned') for each drawing in the list. Once the selections are made, click the Update Records button to record your selections. The approved status (Approved, Conditionally Approved or Not Approved) for the submitted drawing will be updated. If there have not been any revisions to the drawing since it was submitted, the revision approval status and drawing approval status will both be updated. If there is a revision that is later than the submitted revision, the approval status for the revision submitted will be updated but not the approval status for the drawing.

Update Approval Returns

Job No: 999, Job Name:
Job Location: , Cust. Order No:

Update Approval Returns

Return Date: 1/8/2006

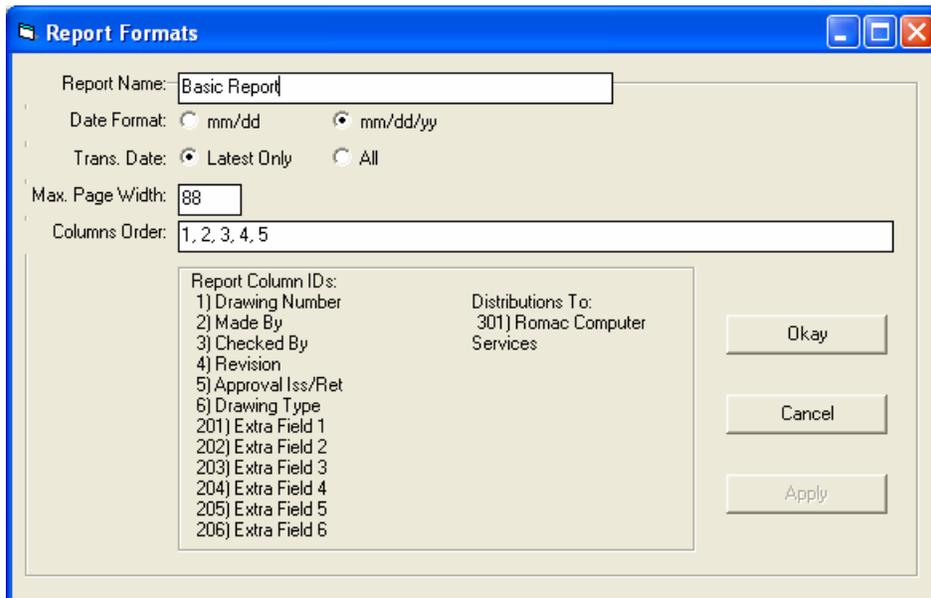
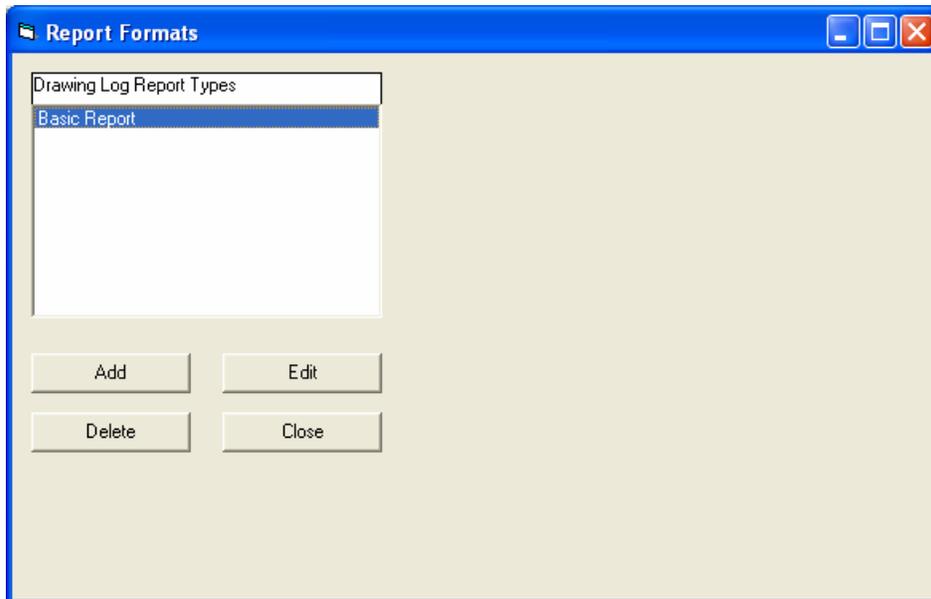
Drawing No.	Return Code
1	Not Returned
2	APPROVED AS SUBMITTED
3	APPROVED AS NOTED
4	APPROVED AS NOTED-RESUB
5	SUPERCEDED
6	APPROVAL NOT REQUIRED
7	Not Returned
8	Not Returned
9	Not Returned
10	Not Returned
11	Not Returned
12	Not Returned
13	Not Returned
14	Not Returned
15	Not Returned

Update Records

Cancel

Report Formats

Custom report formats can be created to generate reports with only the columns needed for a specific purpose. A 'Basic Report' format is automatically created for each project. You can edit this report format and also create additional report formats for each project. Use the menu option Maintenance | Edit Report Formats to edit or add report formats.



The Report Name should be unique within a project.

The Date Format selection allows you to use a report date format containing only the day and month which would reduce the report's width if several date columns are used.

The Trans. Date selection determines if only the latest or all transaction dates are listed. For example, if a drawing contains several revisions and you select 'Latest Only' for Trans. Date then only the last revision would be listed on the report. If 'All' is selected then all revisions would be listed on the report.

A fixed width character font is used to print the reports. The 'Max. Page Width' entry determines the maximum number of characters that will be printed on the page width. If the information to be included in the report exceeds the number of characters specified for the page width, a new page is generated. If the report width requires additional pages, the page numbers will be sub-paged with a, b, etc. (for example 1a, 1b then 2a, 2b etc.) For additional pages, the first column will always be the drawing number. The minimum page width is 88 characters. For reports to be printed on regular size paper in portrait mode, the maximum characters width should be about 132 for best readability. If printing in landscape mode on letter or legal size paper, the maximum characters width can be increased.

The columns to be included on the report and the order they are printed is entered at the 'Columns Order' entry. Column ID numbers determine the columns and column order. Column ID numbers are:

- 1: Drawing number
- 2: Made by and made date
- 3: Checked by and checked date
- 4: Revision number and revision date
- 5: Approval issue and approval return purposes and dates
- 6: Drawing type

201 to 206: Extra fields 1 to 6 - Extra fields may not apply to all drawings types. Currently, if more than one drawing type is selected for a report, the extra fields column(s) for that report printout are omitted.

301 and up: Drawing distributions – A distribution must have been previously set up or used before it can be added to a report format. New distributions are not added to an existing report format – the format must be edited to include the new distribution on the report.

Report formats are specific to a project.

Printed Reports

Drawing listings are available for printed reports or viewing on the screen. The columnar data included on the report is based on the report format selected for printing. To generate a report, use the menu selection Reports | Print ... Report.

The first screen will show a listing of drawing types with the total number of drawings for each type. Select the drawing types to be included on the report from this list. A second list will show the individual drawings of the types selected. You can exclude individual drawings from the report by unmarking the drawing(s) to be excluded.

Report - Basic Report
Job No: 999, Job Name:
Job Location: , Cust. Order No:

Select drawing types to include in report:

Drawing Type	Include	Dwg. Count
Erection	<input type="checkbox"/>	10
Shop	<input checked="" type="checkbox"/>	43
Joist	<input type="checkbox"/>	0
Deck	<input checked="" type="checkbox"/>	4
Design-Arch	<input type="checkbox"/>	0
Design-Struct	<input type="checkbox"/>	0

Select specific drawings to include in report:

Drawing Type	Drawing No.	Include
Shop	1	<input checked="" type="checkbox"/>
Shop	2	<input checked="" type="checkbox"/>
Shop	3	<input checked="" type="checkbox"/>
Shop	4	<input checked="" type="checkbox"/>
Shop	5	<input checked="" type="checkbox"/>
Shop	6	<input checked="" type="checkbox"/>
Shop	7	<input checked="" type="checkbox"/>
Shop	8	<input checked="" type="checkbox"/>
Shop	9	<input checked="" type="checkbox"/>
Shop	10	<input checked="" type="checkbox"/>
Shop	11	<input checked="" type="checkbox"/>
Shop	12	<input checked="" type="checkbox"/>
Shop	13	<input checked="" type="checkbox"/>
Shop	14	<input checked="" type="checkbox"/>
Shop	15	<input checked="" type="checkbox"/>

Previous Next Cancel

The next screen allows you to select additional criterion for drawings to be included in the report. If no additional criterion is selected, all drawings marked on the first screen will be included in the report.

Additional report criterion includes:

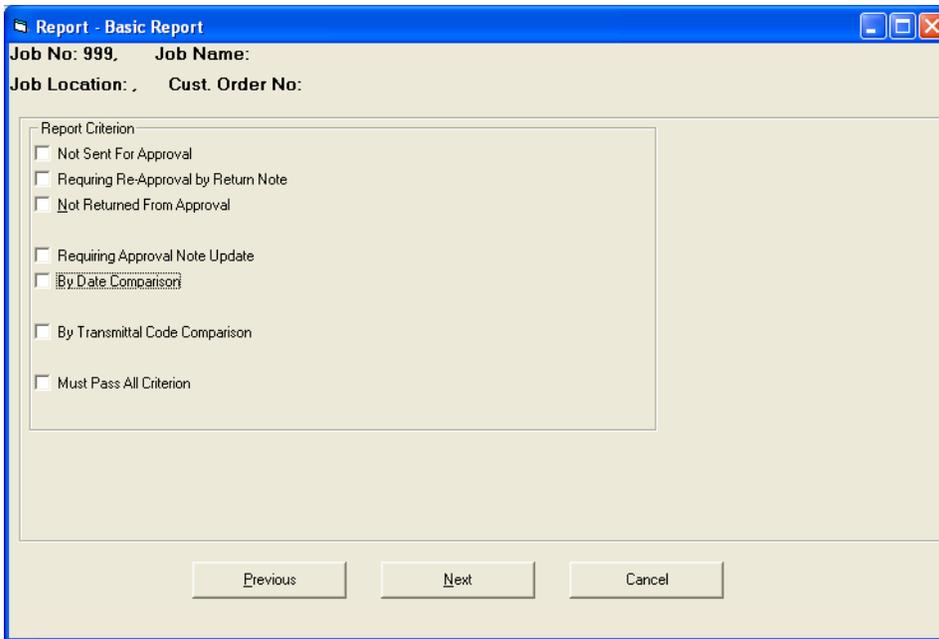
Note, this criterion applies only to drawing types that are noted as "Approval Required".

Not Sent for Approval – Include drawings that have never been sent for approval.

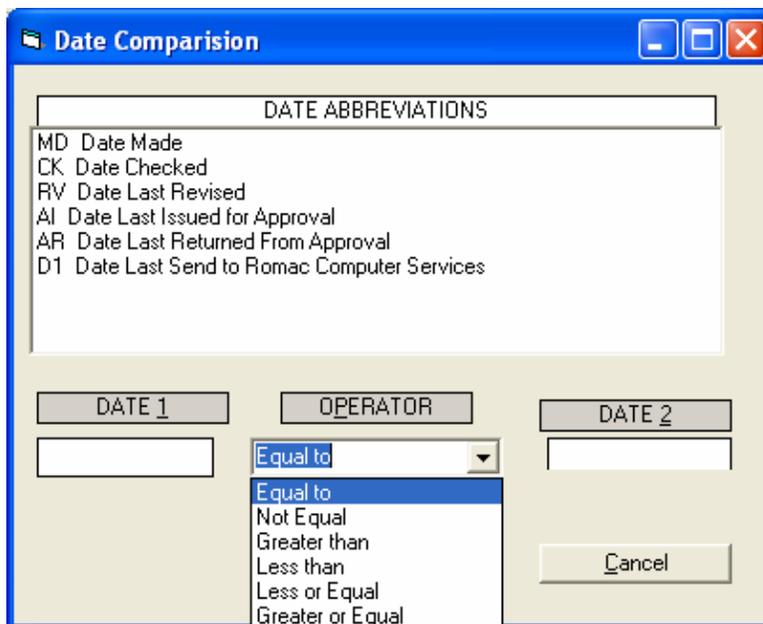
Requiring Re-Approval by Return Note – Include drawings that have not been re-sent for approval after being returned from approval with a note requiring re-submittal.

Not Returned From Approval – Include drawings that have been sent for approval but not returned. An additional prompt will request a 'sent for approval prior to:' date.

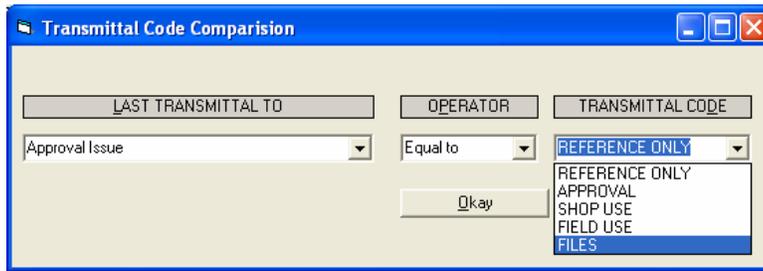
Requiring Approval Note Update – Include drawing returned from approval with a note requiring changes to the drawing but not later revised or re-submitted.



By Date Comparison – Include drawings based on comparison of two dates. The dates can be made date, checked date, last revised date, last approval issue date, last approval return date, last date distributed to ... or a calendar date. When entering a date from the drawing, use the date abbreviation such as MD, RV, etc. If comparing to a calendar date, enter the actual date. Comparison operators are equal to, not equal, greater than, less than, greater than or equal to and less than or equal to.



By Transmittal Code Comparison – Include drawings where the last transmittal for approval or selected distribution is equal to or not equal to one of the transmittal codes.



Must Pass All Criterion – If this option is checked, the drawing must pass all of the selected criterion to be included in the report. If not checked, a drawing passing only one of the selected criterion will be included.

The next screen is a screen listing of all drawings selected for the report based on drawing types selected and any additional report criterion. The screen listing included all columns defined in the report format.

The final screen allows you to print the report to a system printer. Use the Previous button to go back if you need to change any of the report criterion prior to printing.

The reports are designed to print to Windows printers using the Courier New font. Reports will adjust the font size to fit the sheet width using the nearest available size font. If the font size chosen by the program results in a report with characters too small to read, you can change the report to print in landscape mode or in some cases, the report criterion allows exclusion of certain columns in the printout.

Reports will print to the default printer device using the default orientation (portrait or landscape). To print to a printer (or orientation) other than the system default, you have two choices. The system default printer can be changed from the Windows desktop or the printer can be changed from within the program.

To change the selected printer from within the program, after selecting the report to print, click the "Printer Setup" button. The printer you selected will then be used for all subsequent reports printed from that application until you change the selected printer or exit the application. However, the orientation will revert back to the printer's default after each report is printed.