

DocsPro - Managing Documents, Issuing them and Producing Distribution Sheets in an Architects Office

Introduction

DocsPro now encompasses the working practises of design houses, such as Architects offices and M&E contractors, as well as those people who more generally distribute other peoples documents.

Their process is different and requires the production of Document Issue Sheets each time documents are issued – DocsPro has been modified to accommodate this.

Setting Up

To set your system up to produce Document Issue Sheets on a routine basis, you simply follow the normal procedure for distributing and issuing documents. DocsPro will largely remember your selections.

Receiving New Revisions of Existing Documents

You should enter new revisions of existing and new documents in the usual way, click on the ‘Main Document Register’ button, when the list of documents is displayed – click on the ‘Add New Document(s) / Revisions’ Button. Fill in the detail as normal.

When you add document revisions this way, DocsPro will automatically place them in the list awaiting issue.

Reissuing Existing Documents

To reissue existing documents, the easiest way is often to click on the 'Main Document Register' button from the main menu. With the list of documents displayed, locate each document you wish to send out and carefully click on the checkbox to the left of the list (the blue column shown below).

Pick	Originator	Document No.	Rev	Title	Size	Rea	X-Rel
<input type="checkbox"/>	ALL	C34	A	COLUMN 34	A2	CO	
<input type="checkbox"/>	ALL	G[1]	F	COLUMN/H.D. BOLT LAYOUT	A0	CO	
<input type="checkbox"/>	ALL	G[2]	F	COLUMN SETTING OUT	A0	CO	
<input type="checkbox"/>	ALL	G[3]	B	FIRST FLOOR PLAN	A0	CO	
<input type="checkbox"/>	ALL	G[5]	2	ATRIUM ROOF STEELWORK GA	A1	CO	
<input type="checkbox"/>	ALL	G[6]	-	ELEVATION ON TRUSS TYPE 1	A1	CO	
<input type="checkbox"/>	ANCON	504141/02	B	150X70X6 WP2, 3200MM O/A	A4	CO	
<input type="checkbox"/>	ANCON	504141/03	-	150X70X6 WP2, 3300MM O/A	A4	CO	
<input type="checkbox"/>	ANCON	JOHN/001	A	JOHNS FIRST FLOOR PLAN	A1	CO	
<input type="checkbox"/>	ANCON	JOHN/002	A	JOHNS GROUND FLOOR PLAN	A1	CO	
<input type="checkbox"/>	ANCON	JOHN/003	A	JOHNS BASEMENT PLAN	A1	CO	
<input type="checkbox"/>	AWP	*GG1/201/01	-	BAR BENDING SCHEDULE	A4	C	
<input type="checkbox"/>	AWP	*GG1/202/01	-	BAR BENDING SCHEDULE	A4	C	
<input checked="" type="checkbox"/>	AWP	*GG1/203/01	-	BAR BENDING SCHEDULE	A4	C	
<input checked="" type="checkbox"/>	AWP	*GG1/204/01	-	BAR BENDING SCHEDULE	A4	C	
<input type="checkbox"/>	AWP	*GG1/204/01A	A	GROUND FLOR PLAN	A1	C	
<input type="checkbox"/>	AWP	*GG1/204/01B	A	FIRST FLOR PLAN	A1	C	
<input type="checkbox"/>	AWP	*GG1/205/01	-	BAR BENDING SCHEDULE	A4	C	
<input type="checkbox"/>	AWP	*GG1/206/01	-	BAR BENDING SCHEDULE	A4	C	
<input type="checkbox"/>	AWP	*GG1/207/01	-	BAR BENDING SCHEDULE	A4	C	
<input type="checkbox"/>	AWP	*GG1/208/01	-	BAR BENDING SCHEDULE	A4	C	
<input type="checkbox"/>	AWP	*GG1/209/01	-	BAR BENDING SCHEDULE	A4	C	
<input type="checkbox"/>	AWP	*GG1/210/01	-	BAR BENDING SCHEDULE	A4	C	

AWP *GG1/204/01 - No. Picked 3 Select None

Save Picked Documents to File Load List Multi-Edit Find

When you have 'ticked' all the documents you wish to reissue, check the 'No. Picked' under the grid area – if it is ok, click on the 'Multi-Edit' .

Edit Document Details

Edit Document

Originator: Document No.:

Title:

Size: Mark Latest Revisions As 'Unissued'

Withdrawn: Leave as they are Set to 'Withdrawn' Set to 'Not Withdrawn'

Original Plan: If you wish to clear an original or current forecast date for a number of documents, enter a date prior to 1900 (such as 31 Dec 1899).

Curr. Forecast:

DocsPro will display a form like the one above, you should click on the 'Mark Latest Revisions As 'Unissued'' check box – circled in red above. When you are ready click on the 'Save' button.

NOTE: This process only works where documents have been received – planned documents (where the title and size have been entered into DocsPro, but not the revision numbers and dates received) will not be placed in the list awaiting issue.

When you have completed the process above, use your 'Esc' key to return to the DocsPro main menu – you should see the button shown below on the menu form.

If you have received some documents, but not yet distributed them, you can click on the 'Review List of Documents Awaiting Issue...' button to see a list.

[Review List of Documents
Awaiting Issue ...](#)

The Issue Process

To issue your documents, click on the 'Issue and Distribute Documents' button from the main menu. DocsPro will present you with a form like the one below:

The dialog box is titled "Select Documents To Issue / Re-issue". It contains a section with four radio buttons: "Documents Awaiting Issue (an Originator can optionally be specified)", "Re-Issue Documents (an Originator MUST be Specified)", "Use a blank list - add documents individually", and "Restore from a 'Saved List'". Below this is an "Originator" field with a dropdown menu and a button. At the bottom, there are two buttons: "Ok - Extract the documents" and a folder icon.

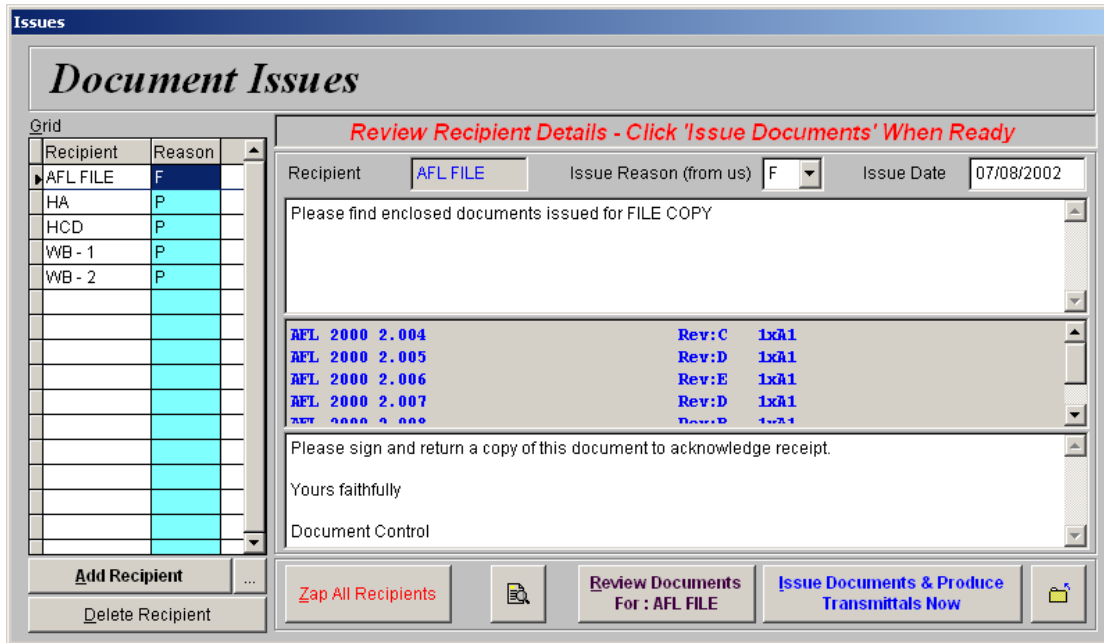
You should normally just click on the 'Ok – Extract the documents' button.

DocsPro will take a moment to make up the list – and will present something like the screen below:

The window is titled "Documents" and "List of Documents To Be Issued". It shows a grid of documents with columns for "Picked", "Originator", "Document No.", "Rev.", "Title", and "Issued". The "No. Picked" is 5 out of 19. Below the grid is a section for "Defaults:" with "Issue Date" set to 07/08/2002 and "Issue Reason (from us)" as a dropdown. At the bottom, there are buttons for "± Pick", "X - Un-Pick", "Find", "All", "None", "Add Document", "Save List", and "Review Distribution & Issue Documents".

Picked	Originator	Document No.	Rev.	Title	Issued
<input checked="" type="checkbox"/>	AFL 2000	2.004	C	5TH FLOOR PLAN (1:100)	P
<input checked="" type="checkbox"/>	AFL 2000	2.005	D	6TH FLOOR PLAN (1:100)	I
<input checked="" type="checkbox"/>	AFL 2000	2.006	E	SET OUT PLAN	P
<input checked="" type="checkbox"/>	AFL 2000	2.007	D	PROPOSED LANDSCAPING	A
<input checked="" type="checkbox"/>	AFL 2000	2.008	B	SITE CONSTRAINTS	P
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

In most cases, you can simply click on the 'Review Distribution & Issue Documents'. If you do not wish to send out all of those on the list shown, simply 'Un-Pick' the documents.

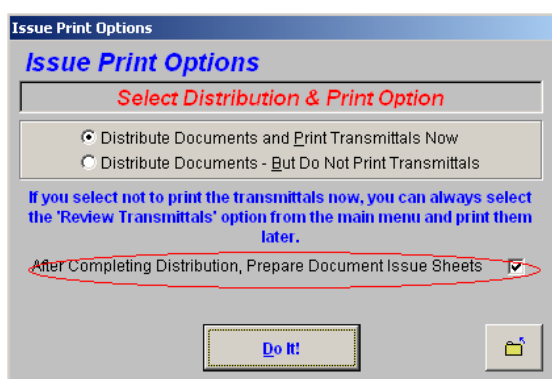


DocsPro will generally display a screen like the one above. In this example the recipients have been extracted automatically – and, importantly, because they have already received at least some of the revisions of the documents you are issuing, the ‘Reason’ has been completed. If the recipients had only had previous revisions – you would need to complete the ‘Reason’ yourself.

You can delete all the recipients if you wish – by clicking on the ‘Zap All Recipients’ button.

You can add more recipients by clicking on the ‘Add Recipient’ button.

To complete the process – when you are happy with your list – click on the ‘Issue Documents & Produce Transmittals Now’ button. DocsPro will present a form like the one below:



To ensure that DocsPro takes you to the Document Issue Sheet form on completion of the issues, you should tick the ‘After Completing Distribution, Prepare Document Issue Sheets’ check box (circled above). Click on the ‘Do It!’ button as soon as you are ready.

DocsPro may ask if you want a print shop request – click on the ‘Yes’ or ‘No’ button.

It will take DocsPro a moment or two to take you to the ‘Document Issue Sheets’ form shown below:

Document Issue Sheet

Document Issue Sheet

Document Originator: **AFL 2000**

No. of Documents Per Sheet: 26

Use 'PageWize' to Minimize No. Pages:

Abbreviate Issue Type to Numbers:

Exclude details of Issues for: []

Summarize Issue Columns:

No. of Issue Columns: 15 20

Address Document Issue Sheet To: []

Print Copy for Each of Most Recent Recipients:

Include only documents issued since: **07/08/2002** Today

This Week Last Week This Month Last Month At Any Time

Progress

No. Documents: [] No. Pages: []

No. Recipients: [] Working On: []

Finedata

DocsPro will normally set the correct originator and date of issue for you – but you will probably want to check the other options as shown in the example above (as this is the setting that will produce the least paper copies) – when you are ready you should click on the ‘Print’ or ‘Print Preview’ button.