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

Introduction

EasyDoc 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 – EasyDoc has been modified to accommodate this.

Setting Up

To set your system up to produce Document Issue Sheets on a routine basis, you must first alter the default settings for each project. To do this, open up your project in the normal way and then click on the 'Other Utilities' button from the main menu. From the Other utilities menu, click on the 'Change Project Details' button. EasyDoc will present a screen like the one below:

You should ensure that the 'Do Not Normally Print Transmittal Notes' check box is ticked. When this is done, click on the 'Save Project Details' Button.

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, EasyDoc 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).

When you have 'ticked' all the documents you wish to reissue, check the 'No. Picked' in the top right hand corner – if it is ok, click on the 'Multi-Edit (xx Docs. Picked)' button (xx is the number of documents).

EasyDoc 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 EasyDoc, but not the revision numbers and dates received) will not be placed in the list awaiting issue.
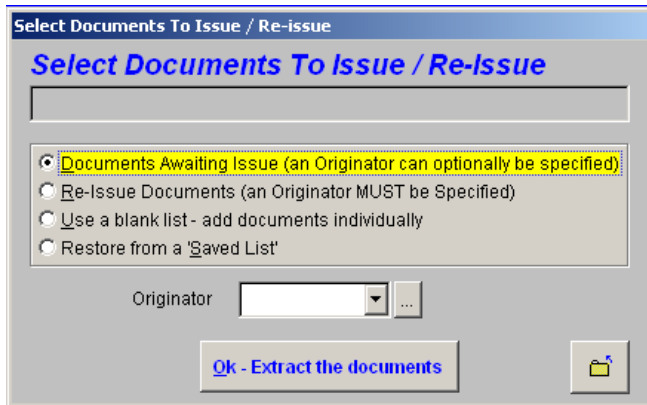
When you have completed the process above, use your 'Esc' key to return to the EasyDoc main menu – you should see the button shown below on the menu form.
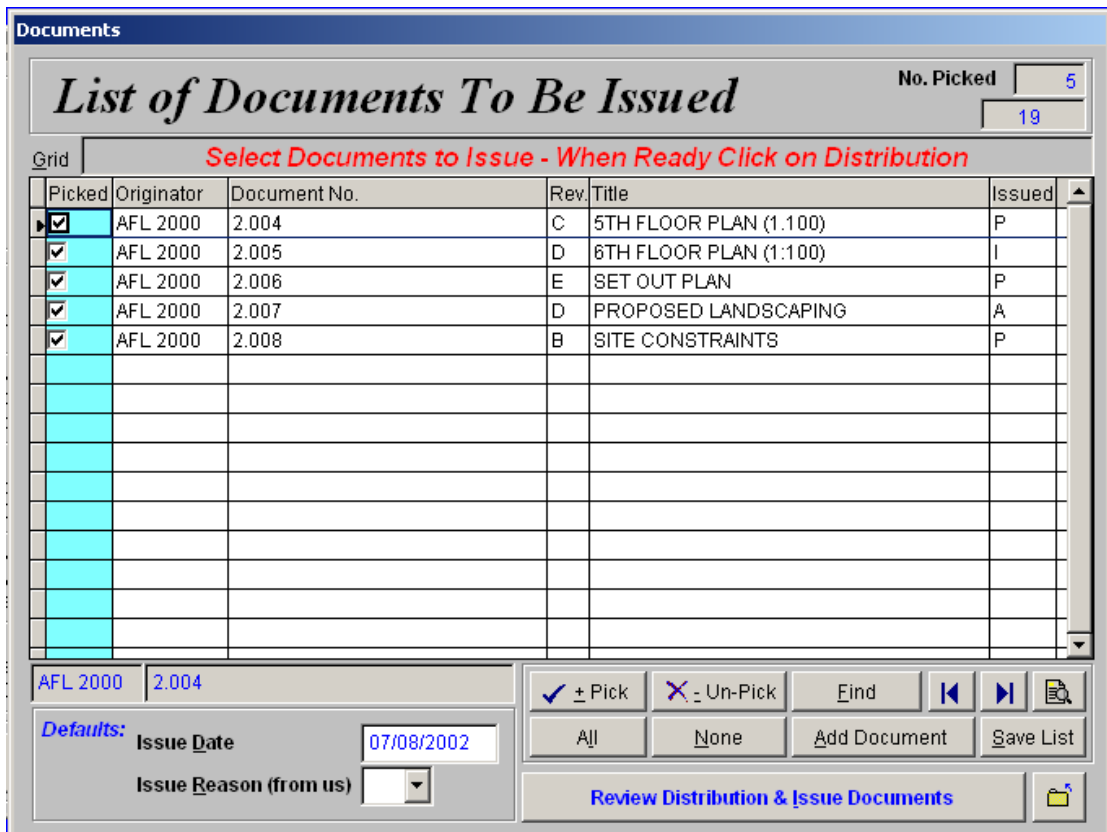
The Issue Process

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

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

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

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.
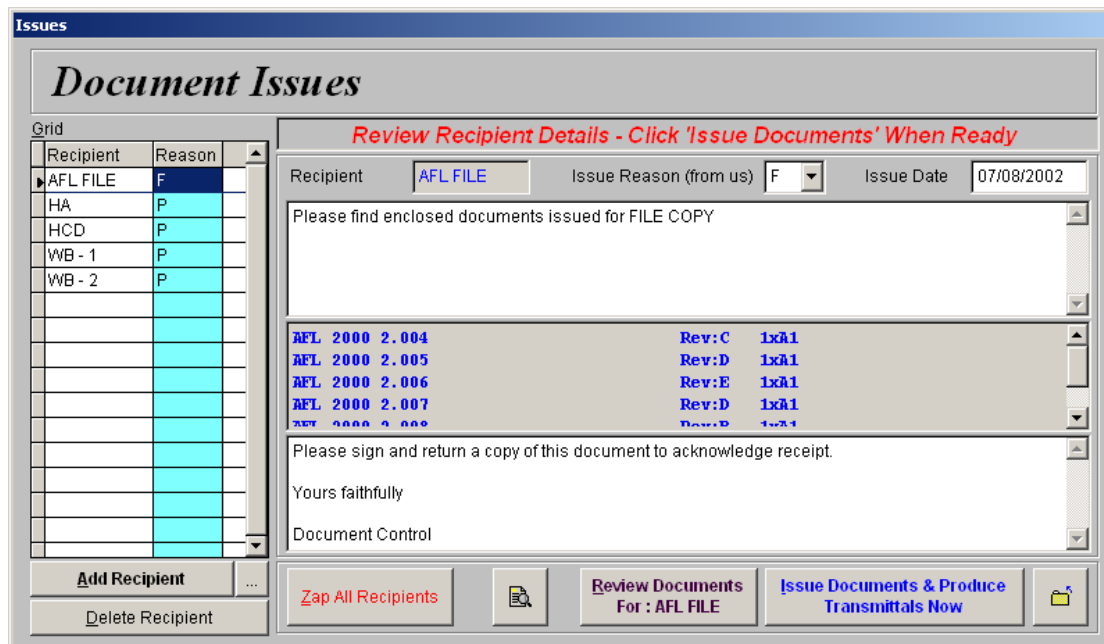
EasyDoc will generally display a screen like the one above. In this example the recipients have been extracted automatically – and, importantly, because they have already received at least some of the revisions of the documents you are issueing, the 'Reason' has been completed. If the recipients had 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. EasyDoc will present a form like the one below:
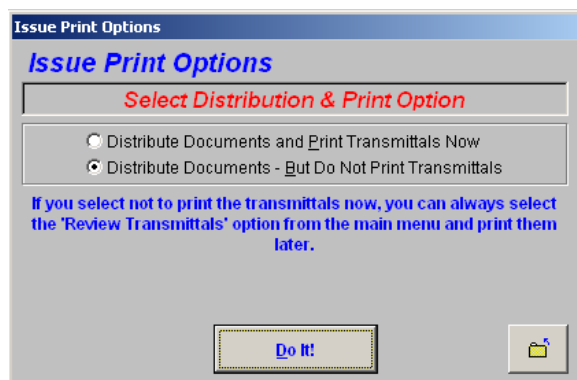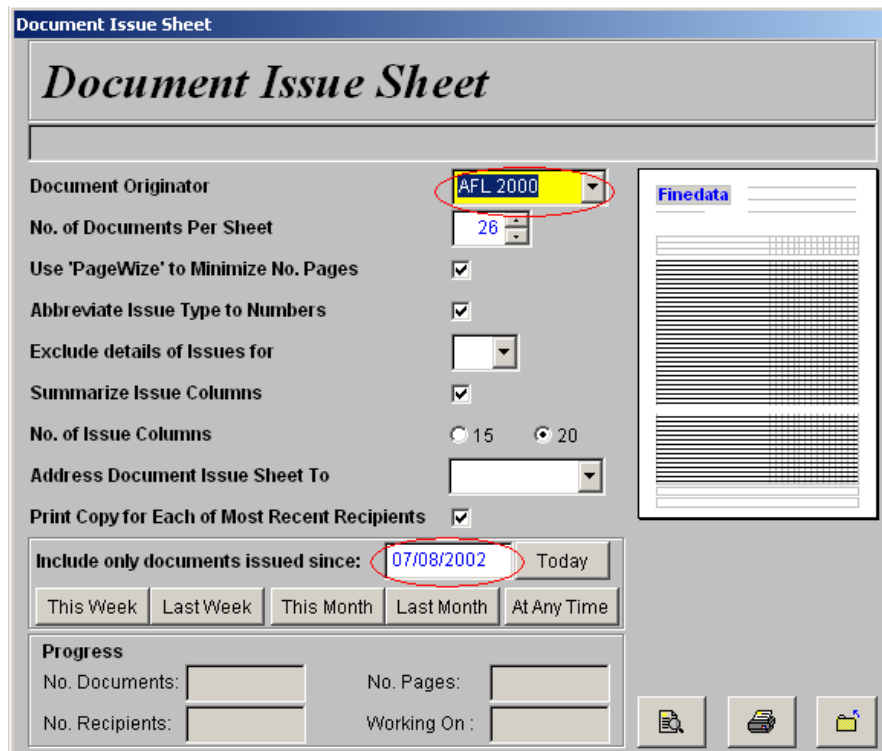

As you have set EasyDoc not to print transmittals by default – you should see the second option indicated as above. Click on the 'Do It!' button.

EasyDoc may ask if you want a print shop request – click on the 'Yes' or 'No' button.

EasyDoc should now prompt you as shown below:
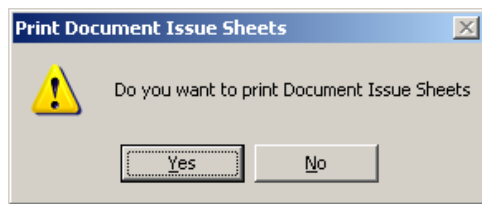
You should click on the 'Yes' button – it will take EasyDoc a moment or two to take you to the 'Document Issue Sheets' form shown below:

In order to minimize the number of pages printed, you should check that all the tick-boxes shown above have ticks in them.

EasyDoc will normally set the correct originator and date of issue for you – so you should be able to just click on the 'Print' or 'Print Preview' button.