An Introduction to EasyDoc

EasyDoc is a simple drawing and document control system designed for small projects not normally employing specialist document controllers who have a computer (running Windows 95, 98 or NT).

EasyDoc enables you to register incoming documents and then distribute them to the people who need the information. A simple transmittal note is produced for each recipient.

EasyDoc is designed to be as quick and simple as possible, it does not have all the 'bells and whistles' of the Finedata DocSafe system.

Your computer must be running Microsoft Windows 95, 98 or NT Workstation, have a CD-ROM drive, at least 64Mb of RAM, 20Mb of free hard disk space, an A4 capable printer and have your display resolution set to 800x600 or better.

This document is only meant to be an introduction – to get you up and running. We believe that it should be all that most people ever need.

Installing EasyDoc

When you run the set-up program you can simply follow the on-screen instructions, but here is a summary for you:
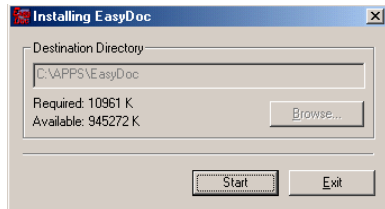
EasyDoc is a doddle to install, simply pop the CD in your drive and the set-up program will normally start automatically. If it doesn't, click on the **<Start>** button (normally at the bottom left of your display) and select the run option. When the box appears type D:\SETUP and press the enter key – obviously you'll need to replace the D: with a different letter if your CD drive is **E:** or **F:** or whatever.
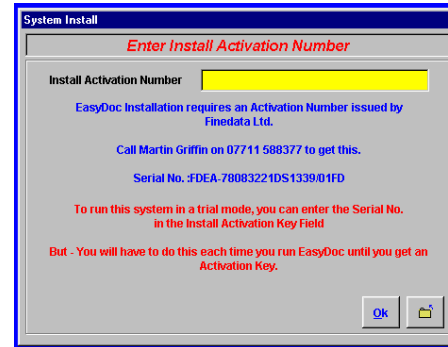
When the screen shown above is displayed, you should click on the **<Start>** button.
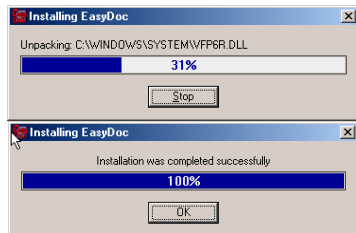
The set-up program will then process the files it needs to install.

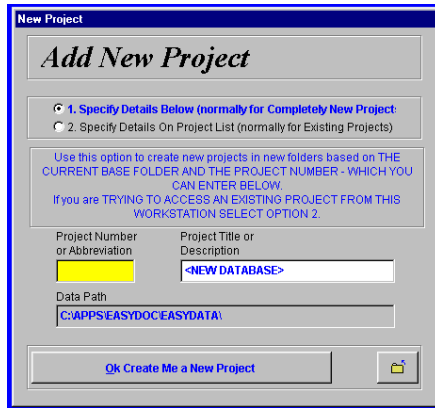When it has finished, it will present a dialog window like the one on the left.

Simply click on the <Ok> button and the process is complete – you should find a shortcut to EasyDoc on your desktop.

When you load EasyDoc for the first time you will be presented with the screen above. You can start out by using the trial activation number. To do this you just enter the serial number in the 'Install Activation Number box' and then click on the **<OK>** button. To get your full activation number, call Finedata Limited on the number shown on your screen.
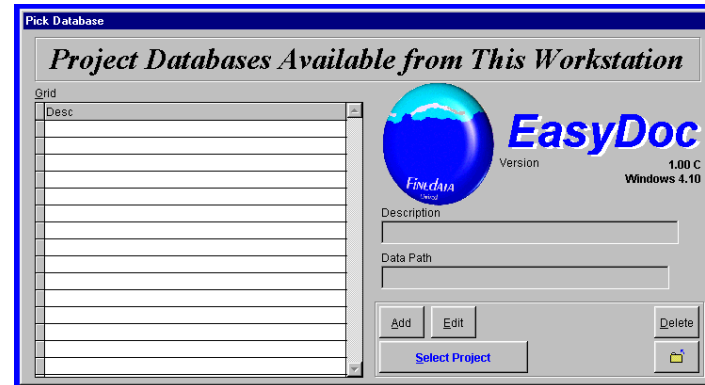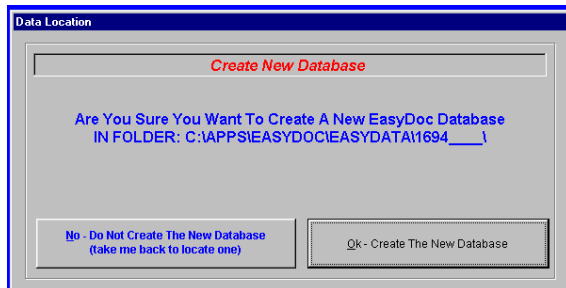
After you have passed the activation number screen, EasyDoc will present a screen like this one. On the left there is a grid, in which you will see each of the projects you set-up with EasyDoc. To add your first one, click on the **<Add>** button.

New Project

Add New Project

- ⦿ **1. Specify Details Below (normally for Completely New Projects**
- ○ 2. Specify Details On Project List (normally for Existing Projects)

Use this option to create new projects in new folders based on THE CURRENT BASE FOLDER AND THE PROJECT NUMBER - WHICH YOU CAN ENTER BELOW.
If you are TRYING TO ACCESS AN EXISTING PROJECT FROM THIS WORKSTATION SELECT OPTION 2.

Project Number or Abbreviation

Project Title or Description
<NEW DATABASE>

Data Path
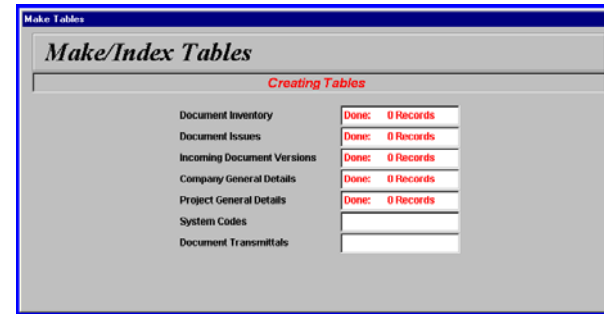C:\APPS\EASYDOC\EASYDATA\

Ok Create Me a New Project

EasyDoc will present you with a window like this one. The 'Project Number or Abbreviation' box will be highlighted. You should enter an identifying code for your project here. This might be an abbreviation of the name, a cost folio number or a project number. If you get it wrong, you can change it later. When that has been completed, EasyDoc with copy your entry to the 'Project Title or Description' box – here you can fill in a longer description for your project. When you are ready, click on the **<Ok Create Me a New Project>** button.

You will have probably noted from the previous screens that there are other options to assist in setting up projects, but this is a getting started guide – so you are advised to follow the default method.
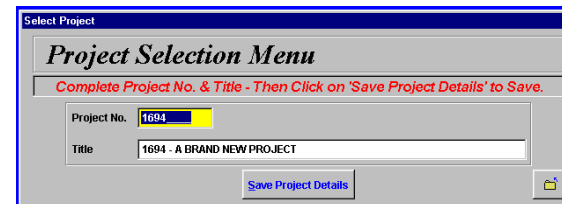
When you click on the **<Ok Create Me a New Project>** button, EasyDoc will take you back to the list of projects and your new one will have been added. To select the project, click on the **<Select Project>** button.

Data Location

Create New Database

Are You Sure You Want To Create A New EasyDoc Database
IN FOLDER: C:\APPS\EASYDOC\EASYDATA\1694____\

No - Do Not Create The New Database (take me back to locate one)

Ok - Create The New Database

The first time you use the new project, EasyDoc will present a screen like the one above. You should click on the **<Ok – Create The New Database>** button. This step is only performed once for each new project.

Make Tables

Make/Index Tables

Creating Tables

|		
Document Inventory	Done:	0 Records
Document Issues	Done:	0 Records
Incoming Document Versions	Done:	0 Records
Company General Details	Done:	0 Records
Project General Details	Done:	0 Records
System Codes		
Document Transmittals		

While the database is initialised, then you will be presented with a window like the one above. When the process has been completed, EasyDoc will present a screen like the one below:

Select Project

Project Selection Menu

Complete Project No. & Title - Then Click on 'Save Project Details' to Save.

Project No. 1694

Title 1694 - A BRAND NEW PROJECT

Save Project Details

The Project No. and Title can at this point be changed if required, they can be different to the ones on the main list of projects if necessary. When you are ready, click on the **<Save Project Details>** button. Two new buttons will then appear, if you click on the **<Edit Project Details>** button you will be able to change the project logo, title and working days (normally set to Monday – Friday inclusive). If you click on the **<Select Project>** button EasyDoc will take you to the main menu.
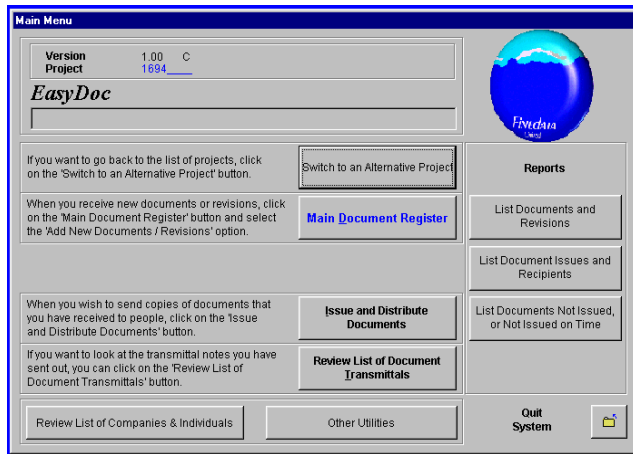
At this point you are just about ready to start registering and issuing documents. Before you do so though, it is worth setting up some of the companies and individuals you will be working with, so click on the *<Review List of Companies & Individuals>* button – it's in the bottom left corner of the main menu.
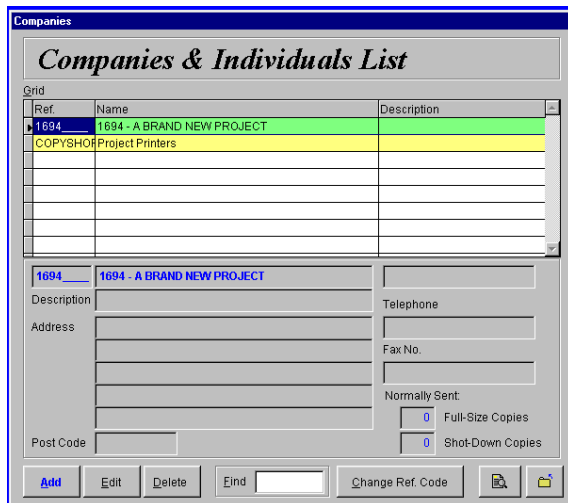
EasyDoc will present a window like the one shown above. There is a grid at the top in which the companies and individuals you need will be listed as you add them. Below the list you will be able to see the address and contact details for each entry.

EasyDoc will have added two items for you, they are your project and the project printers (known to EasyDoc as the COPYSHOP). All you need to do with these two is enter their address and phone number details.

Note that they are colour coded for you – the project entry is normally green and the COPYSHOP is normally yellow. The project printer is often an external company that prepares all the copies of documents being issued – EasyDoc can produce an order form for the printers to get the right number of copies of each document in the right sizes for each distribution.

To complete the address details for each of the predefined items, click on their line in the grid near the top and then the *<Edit>* button. EasyDoc will present a window like the one below:
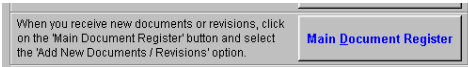

Most of the details are self explanatory, the name and address for example, but the two at the bottom need some explaining. The boxes marked 'Normally Sent: - Full-Size Copies' and 'Shot-Down Copies' refers to the company or individuals preference for the size and number of copies they like, or are entitled, to get when documents are issued to them. Typically drawings are often drawn at A0 or A1 size, but some recipients are quite happy to get copies 'shot-down' to A3. EasyDoc knows a little about document sizes and will automatically issues 'shot-down' sizes where requested (and possible). When you have finished filling in all the details click on the *<Save>* button.
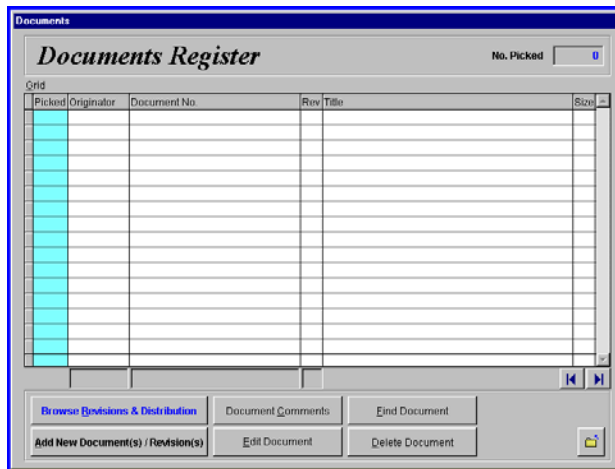
When you have updated both of the pre-defined items, you can click on the *<Add>* button (while the list of companies and individuals is displayed) to add other people the project needs to work with – such as the architect, engineers or sub-contractors. Each one will need a unique reference, such as 'R&P' for 'Roberts and Partners' to help identify them later – as well as their address details.

When all the addresses that you need have been entered, click on the **<Close>** button in the bottom right hand corner – or press the **<Esc>** key on your keyboard. You do not have to add them all now – you can return and add more at any time in the future.

You are now ready to start receiving documents and registering them in EasyDoc. On the main menu you will see a button for the **<Main Document Register>** click on it now.

When you receive new documents or revisions, click on the 'Main Document Register' button and select the 'Add New Documents / Revisions' option.   **Main Document Register**

EasyDoc will present a window like this one.

To add your new documents, click on the **<Add New Document(s) / Revision(s)>** button. EasyDoc will present a screen like the one shown below.
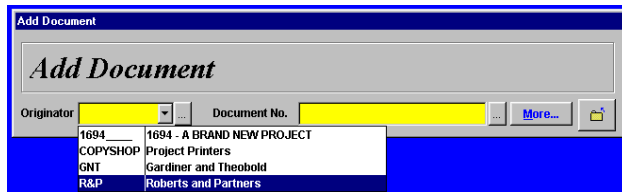

The first thing EasyDoc needs you to complete to complete is the originator, the example shows the drop down list being used to select 'R&P'.

Note the **<…>** button next to the originator list, you can click on here to add a new originator should it be required. You should look for these short-cuts positioned by data entry boxes – they often lead to useful features.

The next field is the document number – which will be unique to each document. Some document controllers prefix document numbers with an asterisk '*' when they are not drawings – this segregates them from the drawings and makes reporting clearer later. When the document number has been completed click on the **<More…>** button.

This will result in EasyDoc extending the data entry window to include some more fields – some of which will only be visible when you start adding new revisions of existing documents.
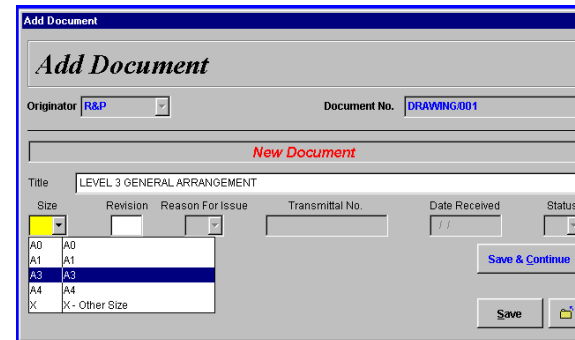

EasyDoc will prompt for a document title, size (in the example the drop down list is being used) and a revision (such as 'A' or '01'). If you complete the revision box, EasyDoc will require a reason for issue and a date received – if you do not, EasyDoc will assume you are just entering the document numbers and titles in advance of receiving the actual documents. When you have completed the document details, if you have more documents to record click on the **<Save & Continue>** button, if you have entered all the documents you wish to click on the **<Save>** button.

EasyDoc will take you back to the list of documents in the main register. To get back to the main menu, click on the **<Close>** button in the bottom right hand corner – or press the **<Esc>** key.
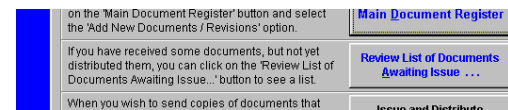

Until all your new documents are distributed, EasyDoc will display an extra button on the main menu **<Review List of Documents Awaiting Issue…>**. You can click on this button to look at your list of newly entered documents and print them out for yourself or someone else to decide about the distribution.

Once the distribution has been decided you should click on the **<Issue and Distribute Documents>** button.
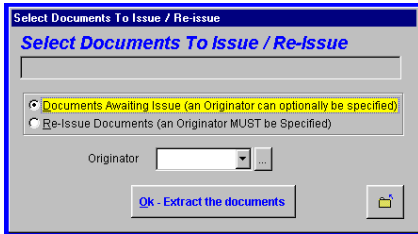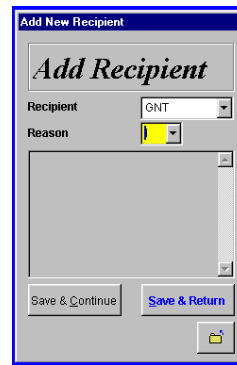
EasyDoc will present a menu, in most cases you should simply click on the **<Ok – Extract the documents>** button.
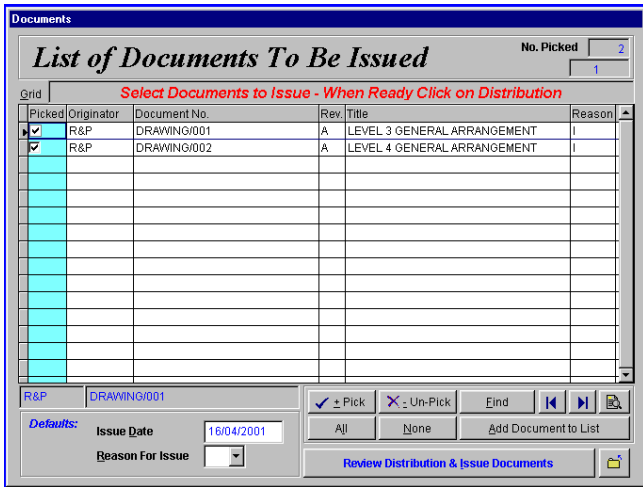
EasyDoc will present you with a window like the one above – listing all the new documents in the grid in the middle. You can select and deselect the documents you wish to issue by turning on and off the tick box in the blue 'Picked' column of the grid. If you have some documents picked, you can click on the **<Review Distribution & Issue Documents>** button.
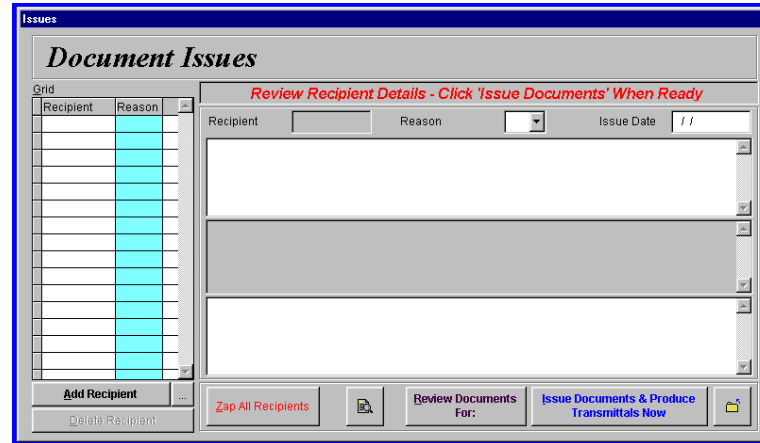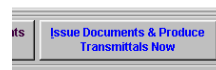

In the example, because they were completely new documents, there are no recipients shown on the left hand side. If the documents were new revisions of existing documents, EasyDoc would present you with a list based on who had the previous revision. To add one or more recipients click on the **<Add Recipient>** button.
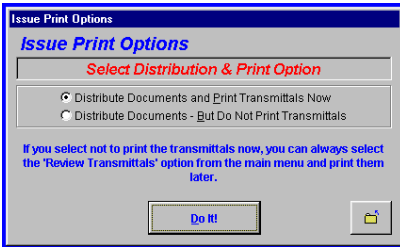

EasyDoc will present you with a window like the one to the left and requires two pieces of information for each recipient, their ID – which you can select from the drop down list of Recipients – and the reason the documents are being sent – which can be selected from the drop down list of Reasons. To add a recipient, fill in the boxes and click on either the **<Save & Continue>** button (if you wish to add more recipients) or the **<Save & Return>** button when your list is complete.

EasyDoc will then take you back to the document issues screen.

When you have completed you list of recipients, click on the **<Issue Documents & Produce Transmittals Now>** button.

Issue Print Options

Issue Print Options

Select Distribution & Print Option

○ Distribute Documents and Print Transmittals Now
○ Distribute Documents - But Do Not Print Transmittals

If you select not to print the transmittals now, you can always select the 'Review Transmittals' option from the main menu and print them later.

Do It!

EasyDoc will present you with a menu like the example and you can chose to make the distribution permanent and either print the transmittals or save them for later. Select the option of your choice and click on the <Do It!> button.

Print Shop Request

⚠ Do you require a 'Print Shop Request'

Yes   No
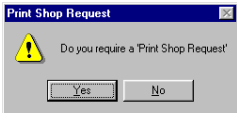
As you have a 'COPYSHOP' entry in your list of companies and individuals, EasyDoc will prompt you as to whether or not you require a 'Print Shop Request' this is a document that lists how many copies of each document, in what sizes, are required to satisfy the distribution you have just completed. *Well done – you're now an EasyDocument Controller!*

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