

DRAWING LISTS AND SUBMISSIONS

Creating Drawing Lists

Drawings are submitted for review to the Design Studio Team. Drawing Lists are typically created first, then if desired, can be pulled into a Drawing Submission Set.

To navigate to the Drawing Items, click **Project Forms**, then **Drawing Items** from the left hand menu. This displays the overall **Manager View** for the module and shows all records for all projects.

To search for an existing document, use the columns to filter for the data you need. For example, use the Record# column to search for a document. You can also narrow your search by school name by selecting it from the **Projects** drop down menu.

To add a new document, click the **Add** button.

The screenshot shows a software interface with a left-hand navigation menu and a main content area. The navigation menu includes categories like PLANNING, PROJECT FORMS, COST MANAGEMENT, SCHEDULING, ASSET MANAGEMEN..., WORKFLOW, PORTFOLIO, TOOLBOX, and EXIT. The 'PROJECT FORMS' category is highlighted in orange, and a red arrow points to it. Under 'PROJECT FORMS', 'Drawing Lists' is selected, and another red arrow points to it. The main content area shows a table with columns: PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, WORKFLOW STATUS, PHASE, FROM CONTACT, and CATEGORY. Above the table is a toolbar with a search bar (containing 'Delivery Me*All*'), a 'Projects' dropdown (containing '5240-N10-16-0AEN - 160AEN - Ne'), and several action icons, including a red-bordered '+' icon. Below the table, there is a message 'No records to display.' and a pagination bar showing 'PAGE SIZE 20'.

The **Header section** is the top portion of the document screen. Enter the following information in the Header:

- Project (**required**)
- Phase – do not select
- Drawing # (**required**) – each drawing number must be unique
- Description
- Workflow Status – will be automatically completed
- Revision – if this is a revision, change this number to the next revision number
- Date
- From
- Category

Once completed, click the **Save** button to continue.



Note: This header section can be created ahead of time and when the attachments are available, the remainder of the document can be filled out.

Project*	<input type="text"/>
Phase	<input type="text"/>
Drawing #*	<input type="text"/>
Description	<input type="text"/>
Status / Revision	<input type="text" value="Draft"/> <input type="text"/>
Date	<input type="text"/>
From	<input type="text"/>
Category	<input type="text" value="Architectural"/>

To add details to the new drawing list item, click the **Add** button.

Drag a column header and drop it here to group by that column

Edit **+ Add** Add Items Delete Refresh Export To Excel Layouts

LINE #	ATTACHMEN	REV.	SHEET	DATE	ITEM	DESCRIPTION	STATUS	%	NOTES	SET #	CE #	LOCATION
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

No records to display.

1 PAGE SIZE 20

Enter your item on the peach colored line, click **Save** when completed. Repeat for each desired drawing item.

Drag a column header and drop it here to group by that column

Save

LINE #	ATTACHMEN	REV.	SHEET	DATE	ITEM	DESCRIPTION	STATUS	%	NOTES	SET #	CE #	LOCATION
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	0	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	No Action	0	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

A completed list example is shown here. Notice that drawings can have individual status settings.

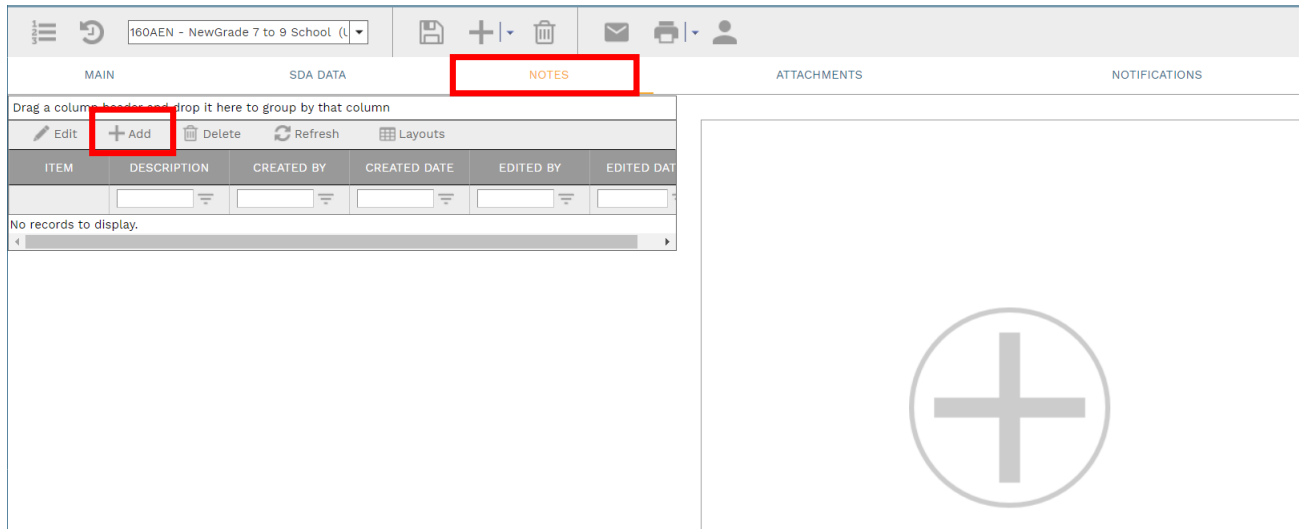
Drag a column header and drop it here to group by that column

Edit **+ Add** Add Items Delete Refresh Export To Excel Layouts

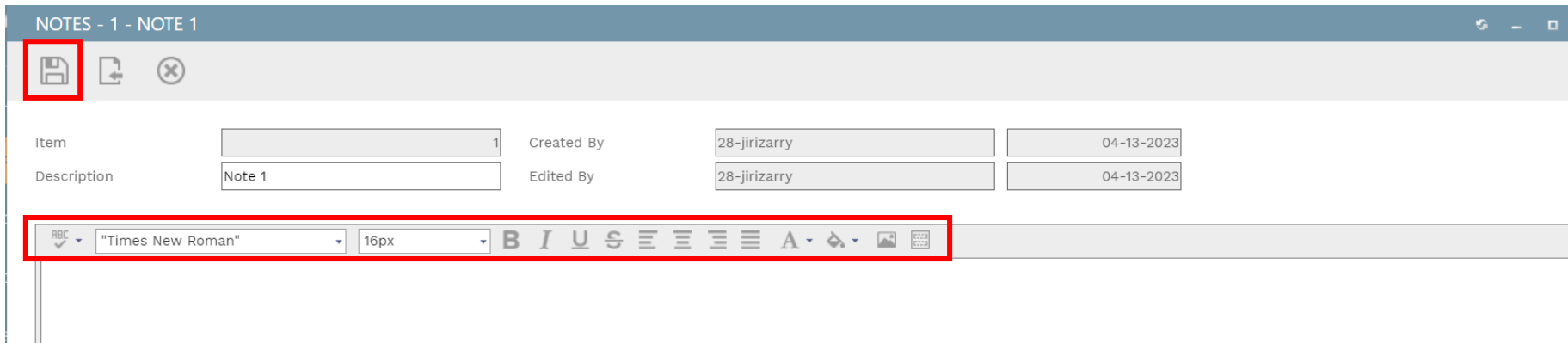
LINE #	ATTACHMEN	REV.	SHEET	DATE	ITEM	DESCRIPTION	STATUS	%	NOTES	SET #	CE #	LOCATION
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
1	(0)	0	1	05-22-2023		Cover Sheet	Approved as Note	0.00			0	
2	(0)	1	1	05-22-2023		Cover Sheet	Revise and Resub	0.00			0	

1 PAGE SIZE 20

Click **Add** on the **Notes tab** to add additional notes as needed.

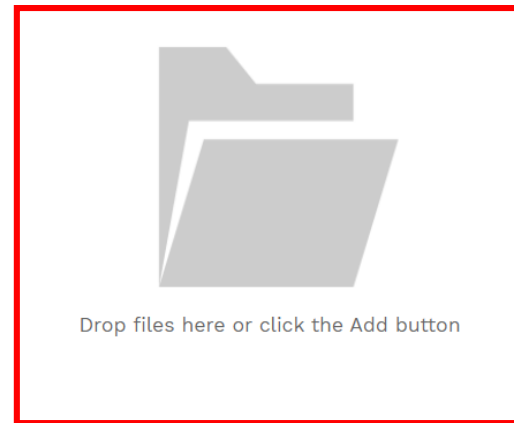
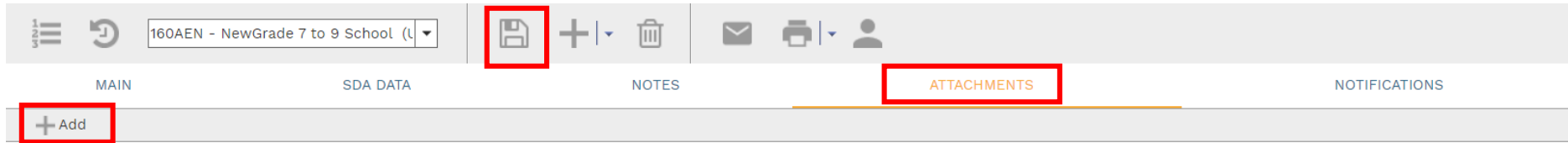


Enter your notes in the field provided. The text can be formatted using the toolbar shown. There is no limit to the amount of text you can enter. Click the **Save** button when completed.



NOTE: The **SDA Data** tab will be used for legacy information that has been copied from the previously used project management tool. *No entry in this section is required.*

On the **Attachments tab**, you can drag-and-drop your desired attachment(s) in the middle section of the screen, or you can choose **Add** to manually navigate to the location of your attachment on your computer, and add it through that window. Repeat the process for all additional attachments. Click the **Save** button when finished.



To print Drawing List information, click the **print button** and select **BI Reporting** from the drop down list. Choose an option from the report menu to receive your output (either Adobe or export to Excel) or to cancel the Reports Preview screen.

The screenshot shows a software interface with a top toolbar and a 'REPORTS PREVIEW' window. The toolbar includes a print button (highlighted with a red box) and a dropdown menu with options: 'Go To BI Reporting Center', 'BI Reporting', 'PMWeb Reporting', and 'PMWeb Word'. The 'BI Reporting' option is selected. Below the toolbar, the 'REPORTS PREVIEW' window displays a table with the following data:

REPORT	RECORD TYPE	DEFAULT
Drawing List Details	Drawing Lists	✓
Drawing Lists	Drawing Lists	

A red arrow points to the 'Drawing List Details' row in the table.

Note: Please be patient when waiting for output from a selected report. It may take a few minutes to load the data.

Creating Drawing Submissions

Drawing Submissions will allow you to group individual Drawing Lists into one document. These documents would be tied together using the numbering scheme of the CSI code.

To navigate to the Drawing Submissions, click **Project Forms**, then **Drawing Submissions** from the left hand menu. This displays the overall **Manager View** for the module and shows all records for all projects.

To search for an existing document, use the columns to filter for the data you need. For example, use the Record# column to search for a document. You can also narrow your search by school name by selecting it from the **Projects** drop down menu.

To add a new document, click the **Add** button.



The screenshot shows the software interface with a left-hand navigation menu and a main content area. The navigation menu includes categories like PLANNING, PROJECT FORMS, COST MANAGEMENT, SCHEDULING, ASSET MANAGEMEN..., WORKFLOW, PORTFOLIO, and TOOLBOX. Under PROJECT FORMS, there are sub-items: Safety Forms, RFIs, Online Submittals, Submittal Items, Submittal Sets, Meeting Minutes, Drawing Lists, Drawing Submissions, Daily Reports, Inspections, Punch Lists, Transmittals, Action Items, Correspondence, and Document Manager. The main content area shows a table with columns: PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, WORKFLOW STATUS, FROM CONTACT, REFERENCE, CATEGORY, and REVISION #. The table is currently empty, displaying "No records to display." Above the table is a toolbar with a refresh icon, a search input field containing "Delivery Me*All*", a Projects dropdown menu with "5240-N10-16-0AEN - 160AEN - Ne", a red box around the "+" button, a trash icon, a refresh icon, a grid icon, and a close icon. Below the table is a pagination bar with "PAGE SIZE 20" and navigation arrows.

The document screen displays. Enter the following information:

- Project (**required**)
- Submission – will automatically increment but this can be changed
- Description
- Workflow Status – will be automatically completed
- Revision – if this is a revision, change this number to the next revision number
- Date – will be automatically completed
- From
- Type
- Reference – specification number

Once completed, click the **Save** button to continue.



Note: This header section can be created ahead of time.

MAIN

Project*	<input type="text"/>
Submission	<input type="text"/>
Description	<input type="text"/>
Status / Revision	Draft <input type="text"/>
Date	<input type="text"/>
From	<input type="text"/>
Type	<input type="text"/>
Reference	<input type="text"/>



Individual Drawing Items are added at the bottom of the screen. Click **Link Drawings**.

Drag a column header and drop it here to group by that column

Edit + Add **Link Drawings** Delete Refresh Generate Transmittal Layouts

LIST #	LINE #	ATTACHMEN	SHEET	REVISION	ITEM	DATE	DESCRIPTION	LOCATION	STATUS	%	NOTES
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

A list of available Drawing Items displays. Search and select all applicable individual Drawing items by clicking the box next to that item, then click **Save**. Note: you may need to use the scroll bars in this window to see the Save button.

LINK DRAWINGS

Project* 5240-N10-16-0AEN - 160AEN - NewGrad

Phase

Drag a column header and drop it here to group by that column

SELECT	LIST #	LINE #	SHEET	REVISION	ITEM	DATE	DESCRIPTION	CSI DIVISION	CSI CODE	CATEGORY	TASK
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	001	1	1	0		05-22-2023	Cover Sheet				
<input checked="" type="checkbox"/>	001	2	1	1		05-22-2023	Cover Sheet				

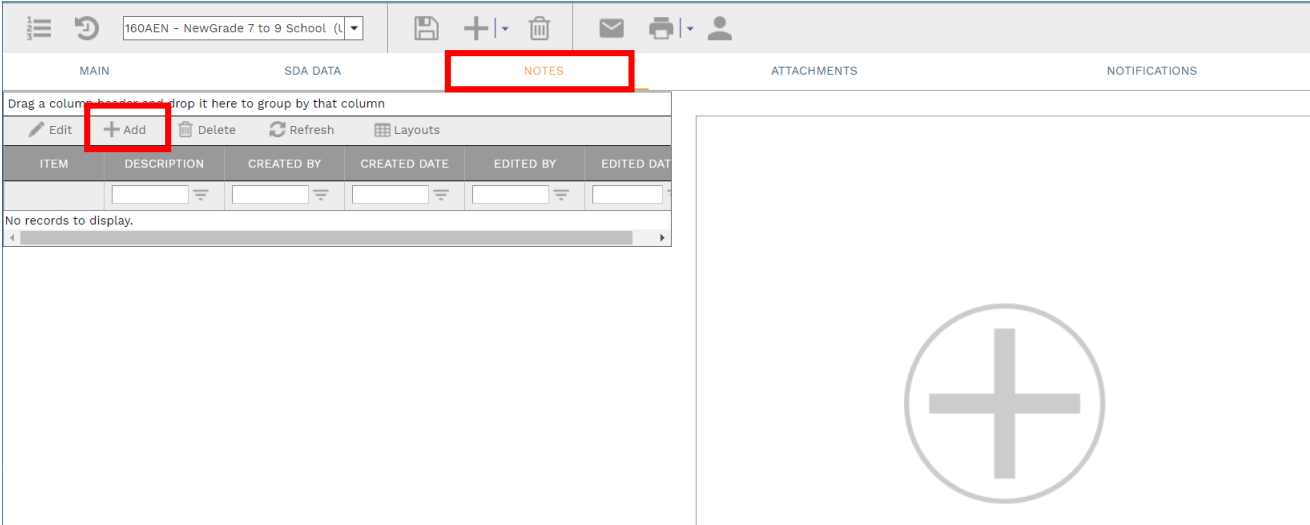
All selected items will be added to the set.

Drag a column header and drop it here to group by that column

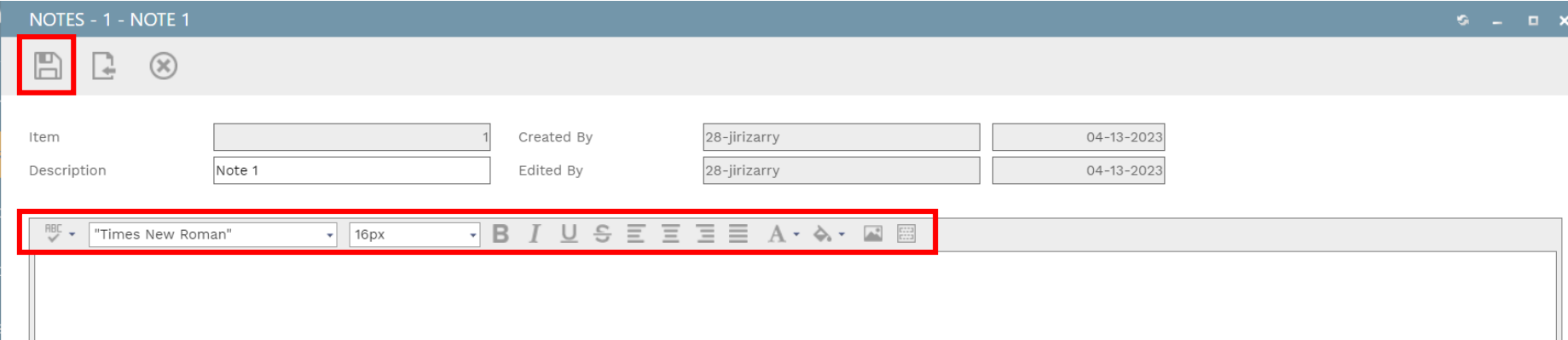
Edit + Add Link Drawings Delete Refresh Generate Transmittal Layouts

LIST #	LINE #	ATTACHMEN	SHEET	REVISION	ITEM	DATE	DESCRIPTION	LOCATION	STATUS	%	NOTES
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<u>001</u>	1	(0)	1	0		05-22-2023	Cover Sheet		Approved as Note	0.00	
<u>001</u>	2	(0)	1	1		05-22-2023	Cover Sheet		Revise and Resub	0.00	

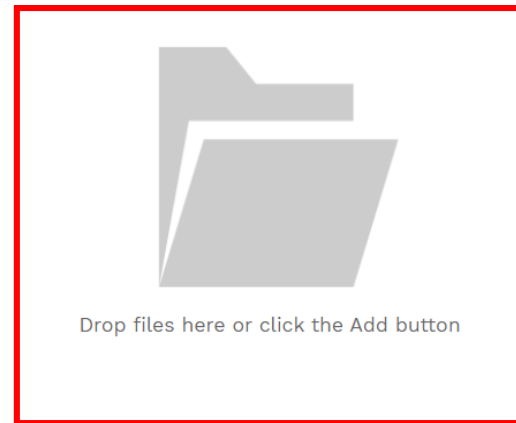
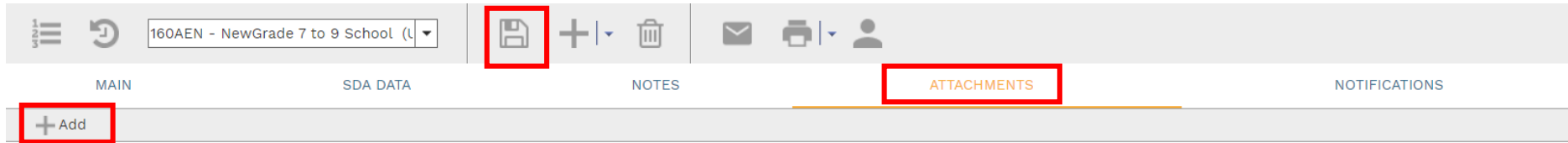
Click **Add** on the **Notes tab** to add additional notes as needed.



Enter your notes in the field provided. The text can be formatted using the toolbar shown. There is no limit to the amount of text you can enter. Click the **Save** button when completed.



On the **Attachments tab**, you can drag-and-drop your desired attachment(s) in the middle section of the screen, or you can choose **Add** to manually navigate to the location of your attachment on your computer, and add it through that window. Repeat the process for all additional attachments. Click the **Save** button when finished.



To print the Drawing Submission information, click the **print button** in the Header section and select **BI Reporting** from the drop down list. Choose an option from the report menu to receive your output or to cancel the Reports Preview screen.

160AEN - NewGrade 7 to 9 School (L)

MAIN SDA DATA NOTES ATTACHMENTS COLLABORATE NOTIFICATIONS

Drag a column header and drop it here to group by that column

Edit + Add Delete Refresh Layouts

Go To BI Reporting Center
BI Reporting
PMWeb Reporting
PMWeb Word

REPORT RECORD TYPE DEFAULT

Drawing Set Form	Drawing Sets	✓
1		

Drawing Set Form

PMWeb

Project 160AEN - NewGrade 7 to 9 School (Union City) Project Number 5240-H10-16-04-EN

Drawing Set #: 001
From Contact:
Date: 05-22-2023

Line #	Sheet	Revision	Date	Description	%	Category
001	1	0	05-22-2023	Cover Sheet	0.00%	
002	1	1	05-22-2023	Cover Sheet	0.00%	

1 of 1 Printed on 05-22-2023 PMWeb

Note: Please be patient when waiting for output from a selected report. It may take a few minutes to load the data.

A **Workflow** is an automatic process initiated for the review of a document. Individuals who are responsible for reviewing, submitting information or approving the document have already been identified for this project and module.

On the **Workflow tab**, click the **Submit** button to begin the workflow process. The information for this workflow is shown, click **Save** to continue and initiate the workflow. Enter comments or additional email addresses if needed. As the document moves through the review/approval process, you will be able to come back to this screen to see the progress.

ACTIONS

BUSINESS PROCESS

WORKFLOW LOG

EMAIL PREVIEW

Subject: PMWeb Approval Request: RFIs 00001 -- 966 - 160AEN - NewGrade 7 to 9 School (Union City) - Utility Disconj

Comments: [Empty text area]

Email Body: A document has been Submitted for approval by Jennifer Irizarry.

Workflow Document Information:

- Document type: RFIs
- RFI #: 00001 -- 966
- Project Name: 160AEN - NewGrade 7 to 9 School (Union City)
- Contract: HU-0029-N01
- Document Description: Utility Disconnects

Add CC: [Empty text field]

DROP FILES HERE OR CLICK TO ADD

BUSINESS PROCESS

#	TYPE	ALL MUST APPROVE?	DUE DATE	ROLE	USER	DELEGATE	INSTRUCTIONS
	[User icon]	<input type="checkbox"/>		-- Submitter --			
1	[Group icon]			-- APM --	Prevent Submit if Category Blank		A value other than "Please select a value" is required to select to branch workflow.



You will be able to monitor the progress of the workflow process by referring to the Workflow Status field. If the document is returned at any point along the way, you will be able to modify as needed and resubmit the document in the workflow process.

Project	5240-N10-16-OAEN - 160AEN - NewG	▼
RFI #*	00001 -- 966	
Description	Utility Disconnects **MK:cdb67b19966c	
Contract #	HU-0029-N01	
Status	Draft	▼
		0

