CREATING DRAWINGS AND PACKAGES

Drawings are approved via the Submittals process and then uploaded to Drawings once approved. See the Submittals QRG additional help.
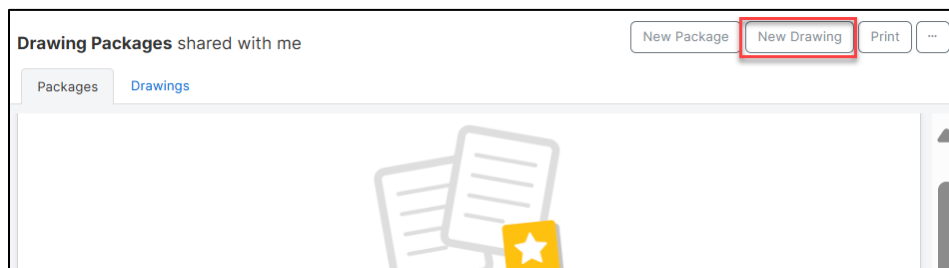
To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.
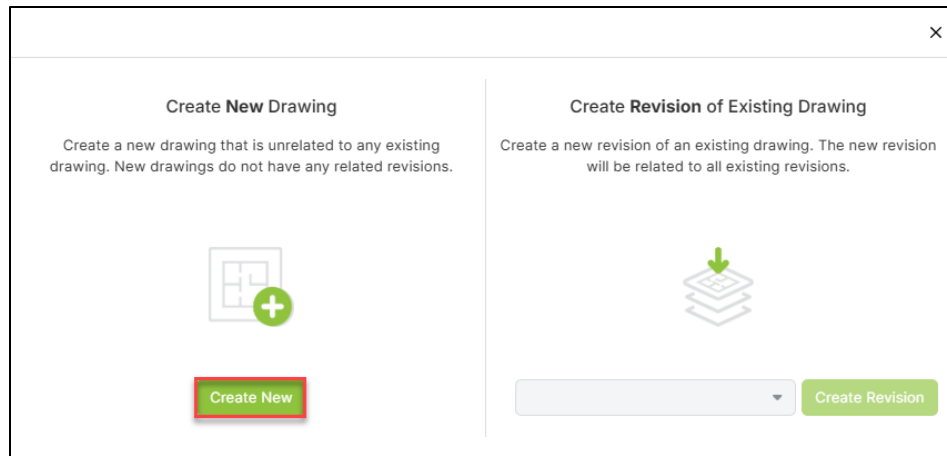
MANUALLY CREATE A NEW DRAWING

Drawings can be managed individually or grouped in a Package.
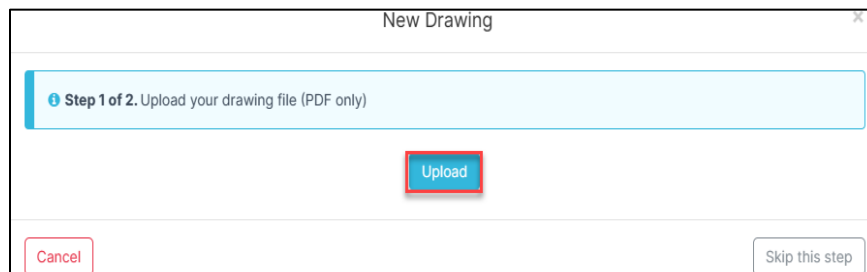
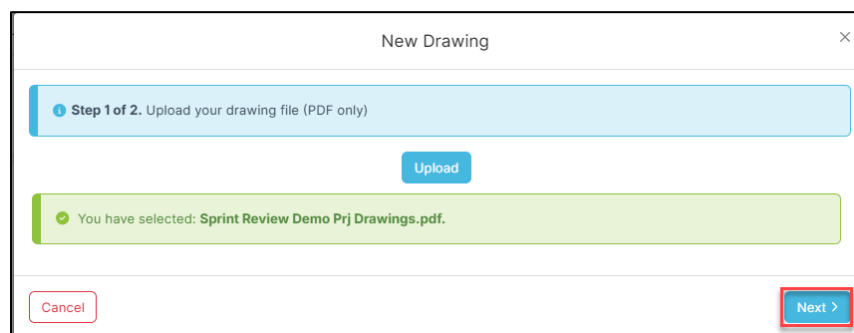1) Click **New Drawing** from the open Drawings form log view.

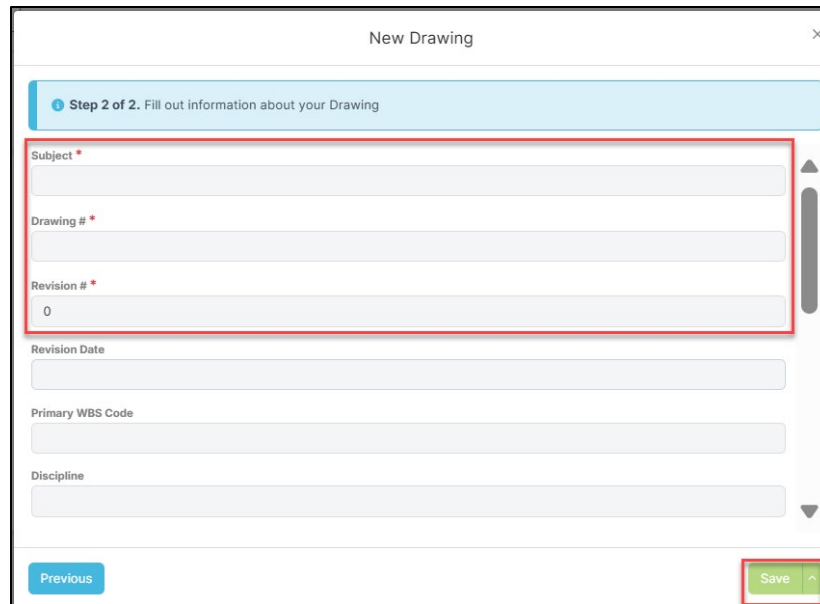2) Select **Create New** from the *Create New Drawing* side of the window.

3) To upload the actual drawing file, click **Upload**.

4) Locate and click the drawing title to select the document and click the **Open** button located on the bottom right corner of the Files window.

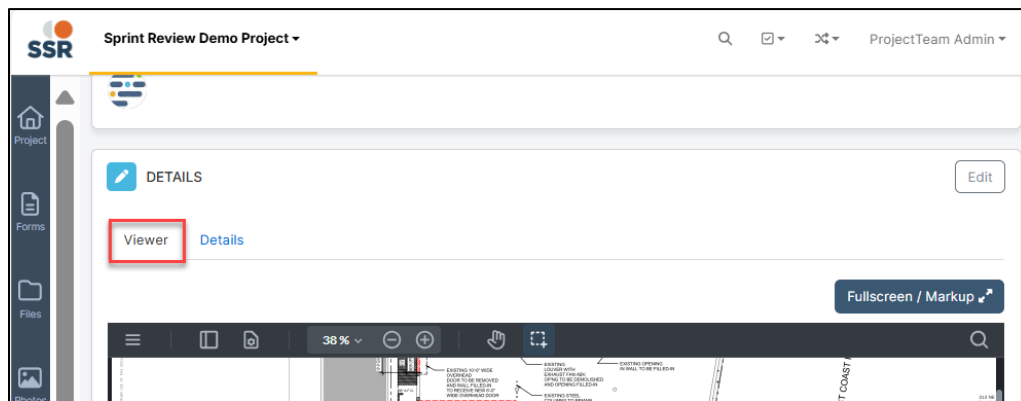5) Click the **Next** button located in the bottom right corner.

6) The Drawing form will open. Enter the required information in the **Subject, Drawing # and Revision #** fields. The remaining fields are optional.
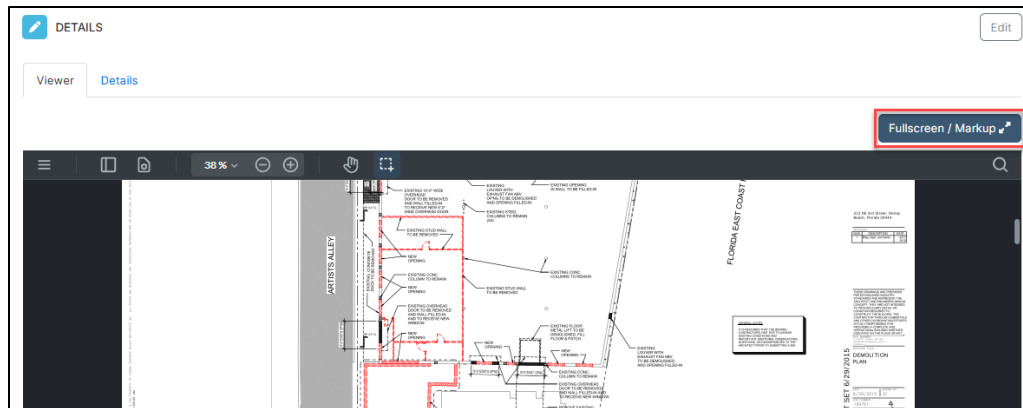
7) **Save** the record.

8) The *Drawing* record will open with a preview of the file in the **Viewer** tab of the *Details* pane.

9) To view the document in full screen or markup the drawing, click the Fullscreen/Markup button located in the top right corner of the Viewer screen. See: Add markup annotations to a file.
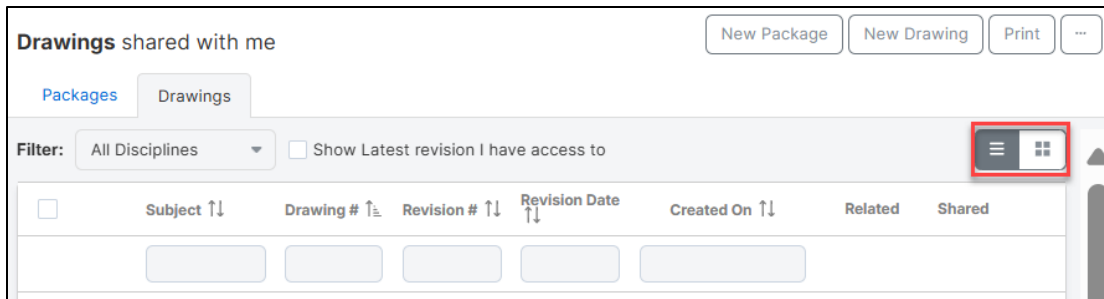
10) To view the drawing information, click the **Details** tab. To edit the record, click the **Edit** button.


11) Once edits are complete, **Save** the record.
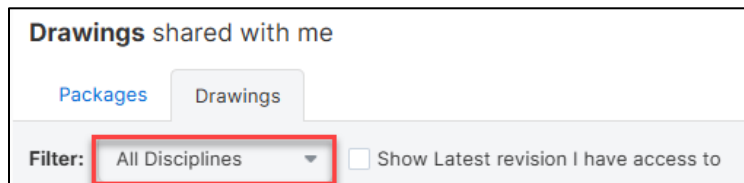
VIEWING DRAWING LOG

1) Open the **Drawings** tab of the Drawings form type.
2) There are two options to view the list of drawing records in the project. To switch between the views, **click the toggle button located on the top right corner of the log.**
   a . **List View** allows the user to see a list of records. This list can be configured to show different fields in the grid.
   b. **Thumbnail View** allows the user to see small images of the drawing documents listed by Discipline. To open a drawing click the thumbnail

3) Click the **checkbox** above the grid to view the latest revisions of each document.
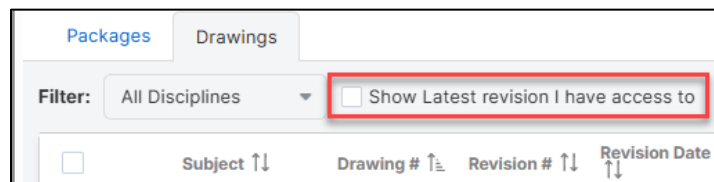
4) To filter by Discipline, click the **dropdown arrow** for the discipline filter field.

EDIT THE DRAWING RECORD

1) In the Drawing log List View option, click a **drawing title hyperlink** to open the document. To open a document via the Thumbnail view, click the **image of the drawing** you wish to open.

2) The drawing document will open. To add additional information about the drawing, click the **Edit** button in the *Details* section.
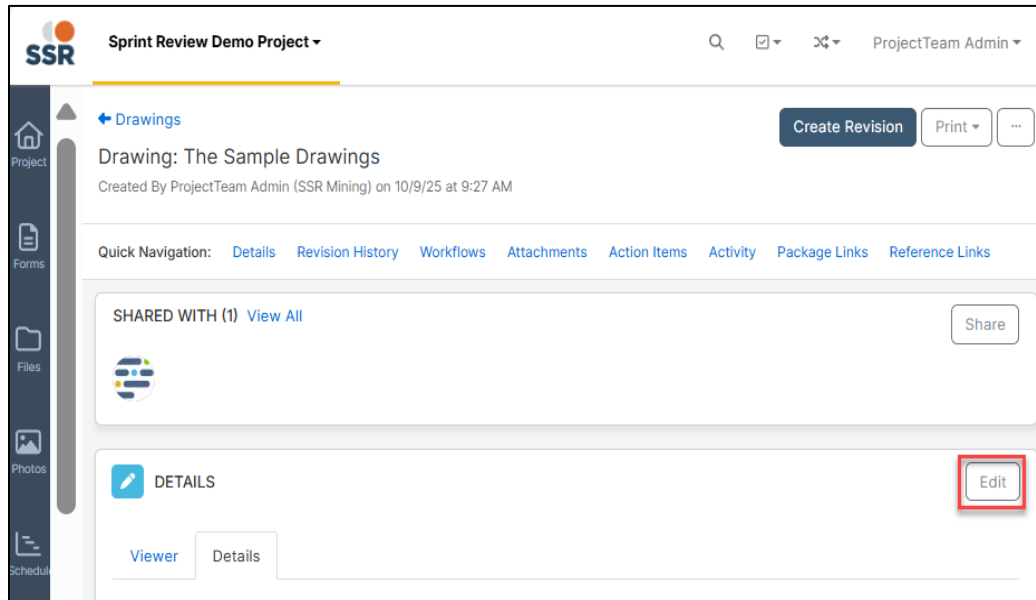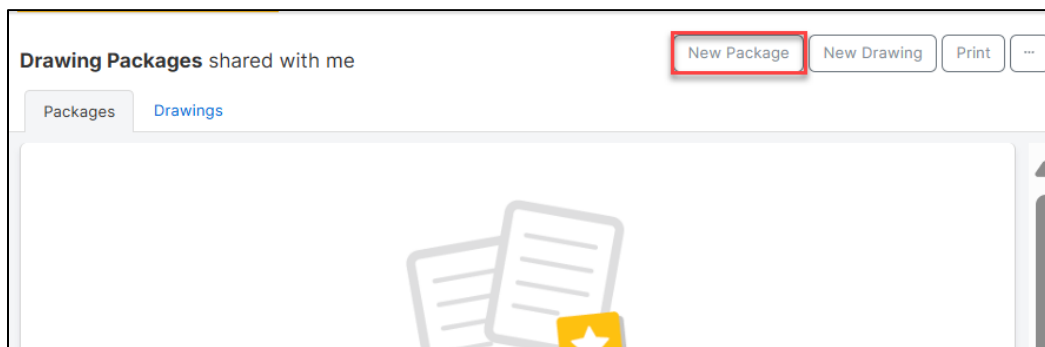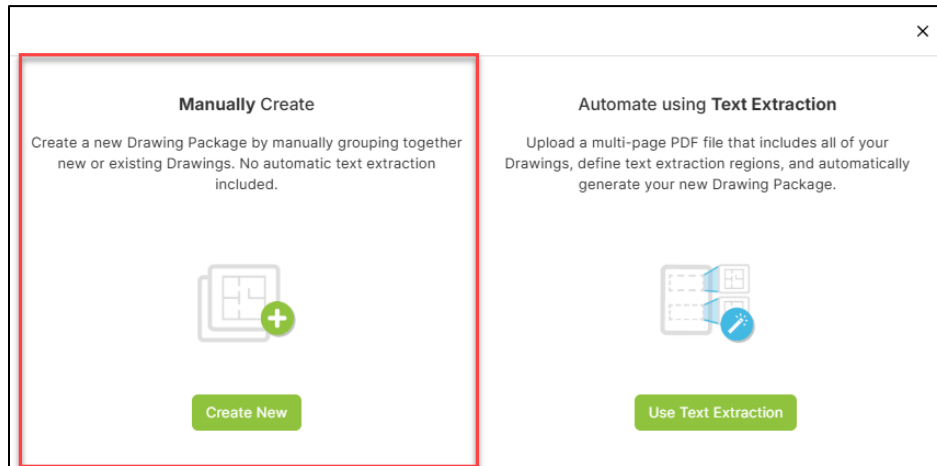

3) Make your changes and **Save** the record.

MANUALLY CREATE A NEW DRAWING PACKAGE

A drawing package is a group of one or more drawing items. Packages allow for multiple drawings to be managed together.

1) Open **Drawings** from the options that open after clicking on **Forms** in the left navigation pane.
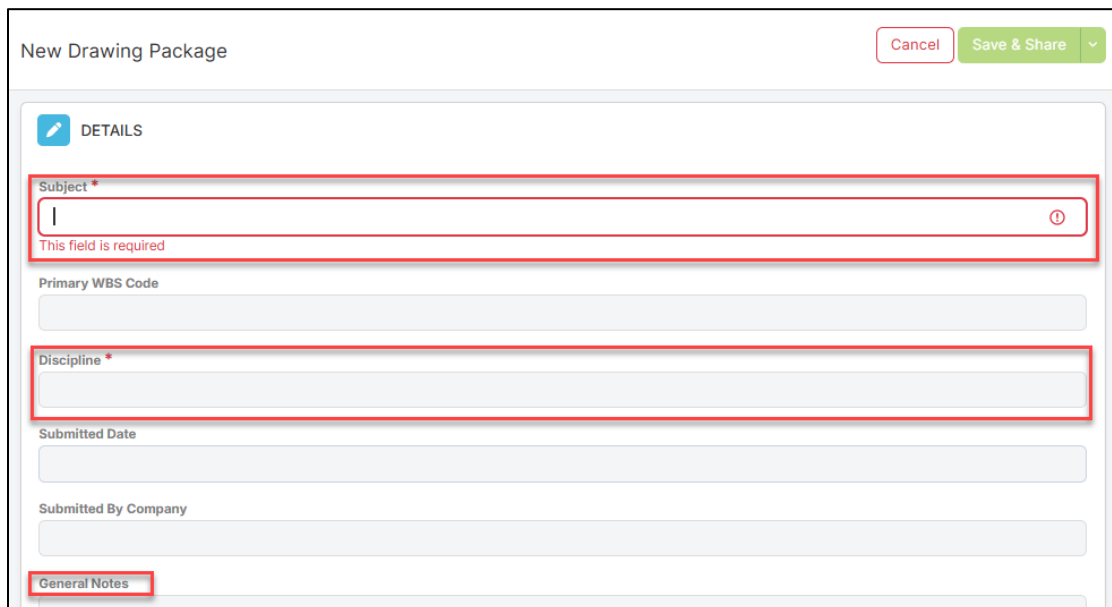
2) Click **New Package**.

3) Select **Manually Create** from the window that opens.

4) The *Drawing Package* form will open. Enter the required information in the **Subject** and **Discipline** fields. The **General Notes** field is optional.

5) To add individual *Drawings* which already exist in ProjectTeam to the package, click the **Add Existing** button.

6) Click the checkbox beside each drawing you wish to add to the package and click the **Add** button.

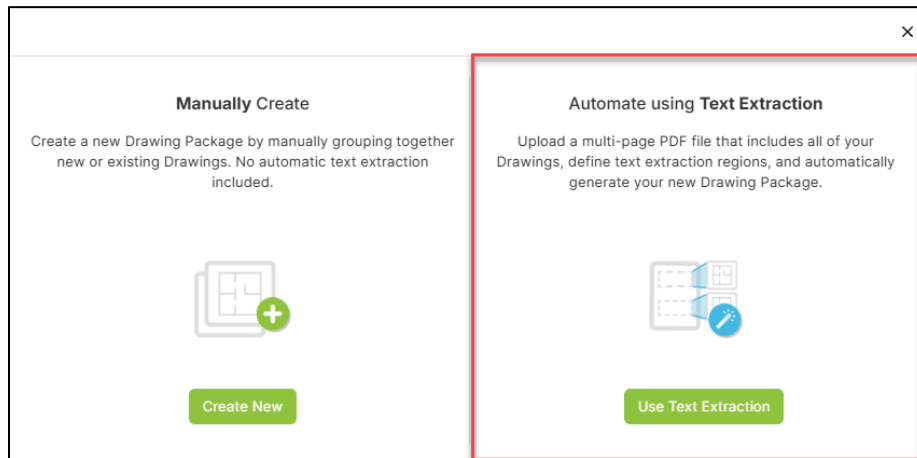7) If adding a drawing to the package which *does not* exist in ProjectTeam, click the **Create New** button.

8) **Save** the record.
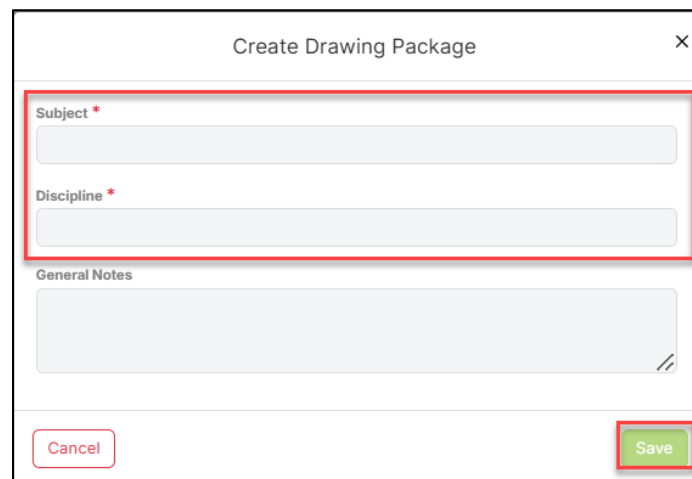
CREATE A NEW PACKAGE USING TEXT EXTRACTION

See: **Create a Drawing Package using Text Extraction**

1) Repeat steps 19-21 from above.
2) Click **Use Text Extraction** from the window that opens.

3) The ***Drawing Package*** form will open.
4) Enter required information and **Save** the record.

5) Drag and drop or browse your computer to upload drawings in PDF format.

NOTES: File(s) can contain multiple drawings or a single drawing. Multiple files can be uploaded at once.

6) Click **Next**.

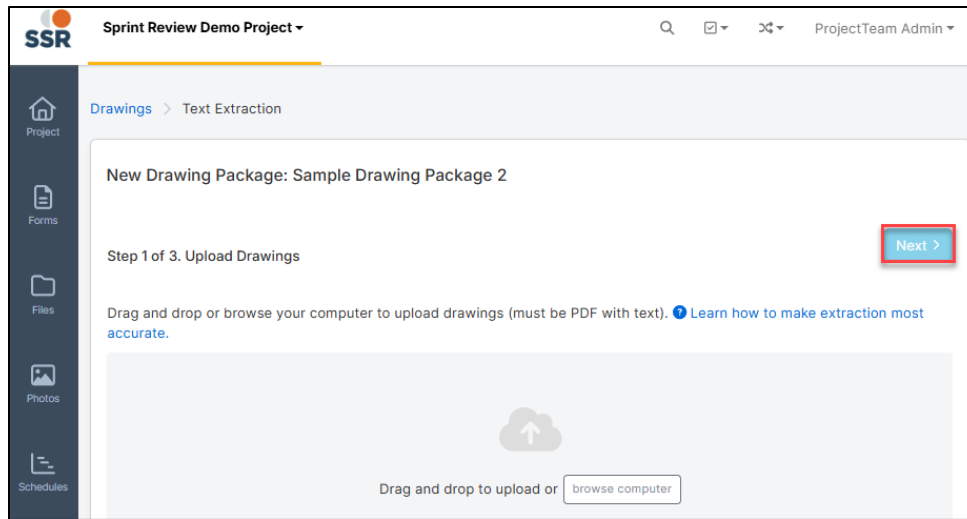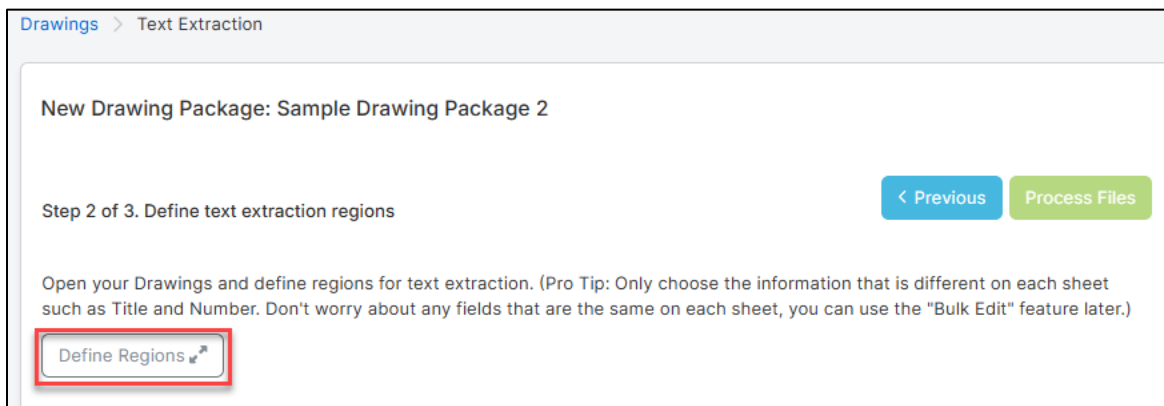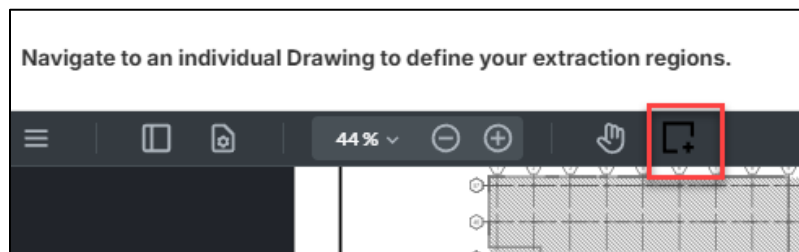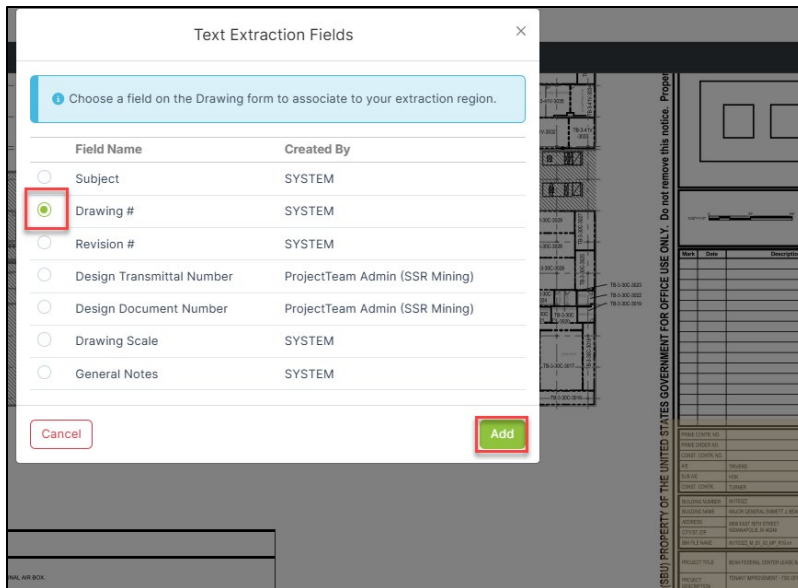7) Click **Define Regions** to identify the locations on the drawings for text extraction.

8) Click on the **Square with the +** to select a region, click and drag the yellow box over the desired region.

9) Select the field to add by clicking on the radio button in the list, and click **Add**. Repeat as needed for all desired fields.

10) Click **Close.**

11) Click **Process Files.**
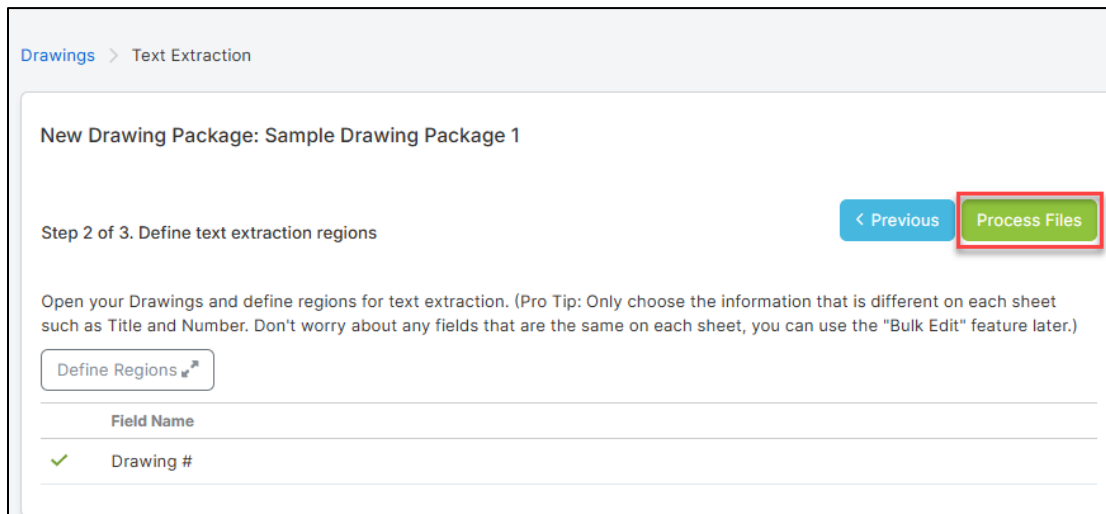
12) Click **View Drawings Log**

NOTE: When the drawings are done processing, you will receive an email that allows you to review the package. Alternately, in the header of the drawing log will be a banner that shows the status of the package and will display a link to review when complete.

13) Review the results for the first drawing. Make corrections as needed.

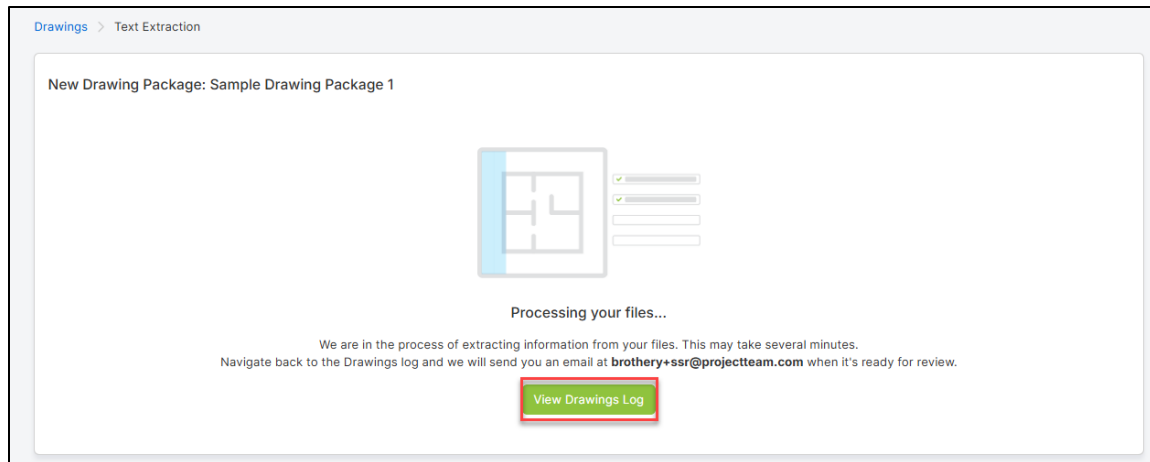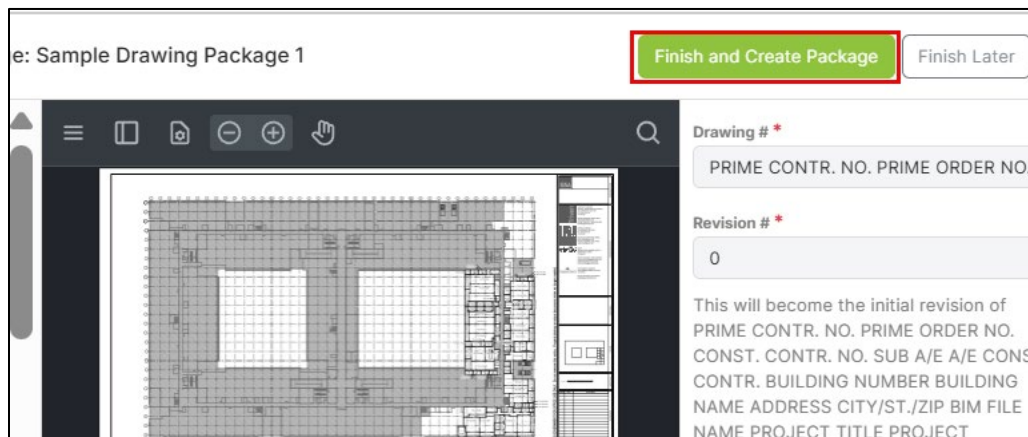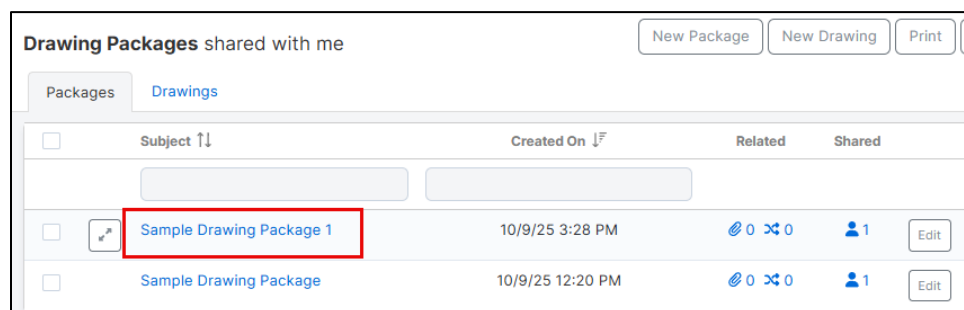14) When satisfied with a drawing click **Confirm & Next**.

15) Repeat for each drawing.

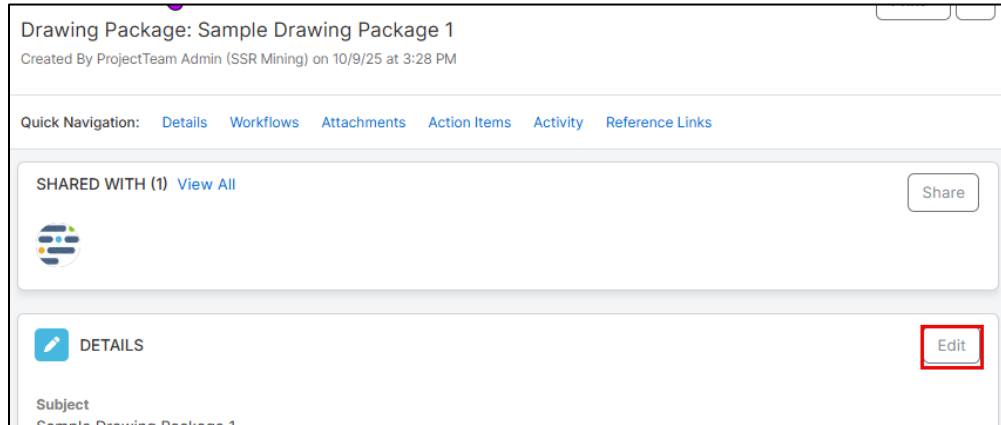16) When all drawings have been confirmed click **Finish and Create Package**.

EDIT THE DRAWING PACKAGE RECORD

1) In the *Drawing Package* log, click a **drawing package title hyperlink** to open the document.

2) The *Drawing Package* record will open. To add additional information about the drawing package, click the **Edit** button in the *Details* section.

3) Make the changes.
4) **Save** the record.

DOWNLOAD OR UPLOAD DRAWING DOCUMENTS FROM THE PACKAGE

5) Open the drawing package. In the Details section of the package, click the **ellipsis (three dot)** button above the drawings section and click **Download Drawings** or **Upload New Drawings**.
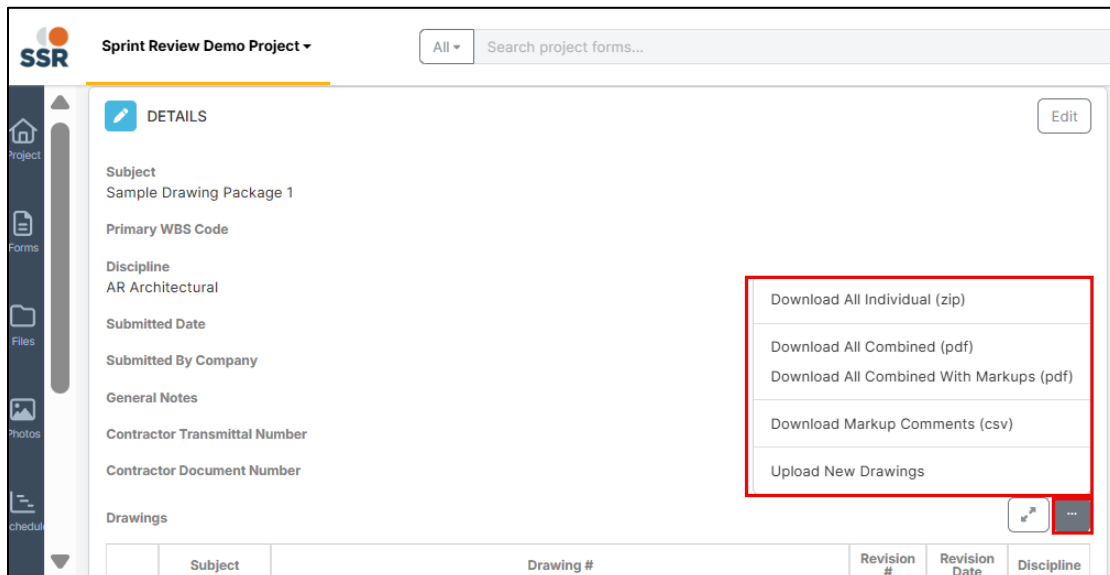
6) When downloading, the drawing documents will download in a zip file to the *Downloads* folder on your computer.

7) When uploading, you can **drag and drop** your new drawings or click **browse computer**.
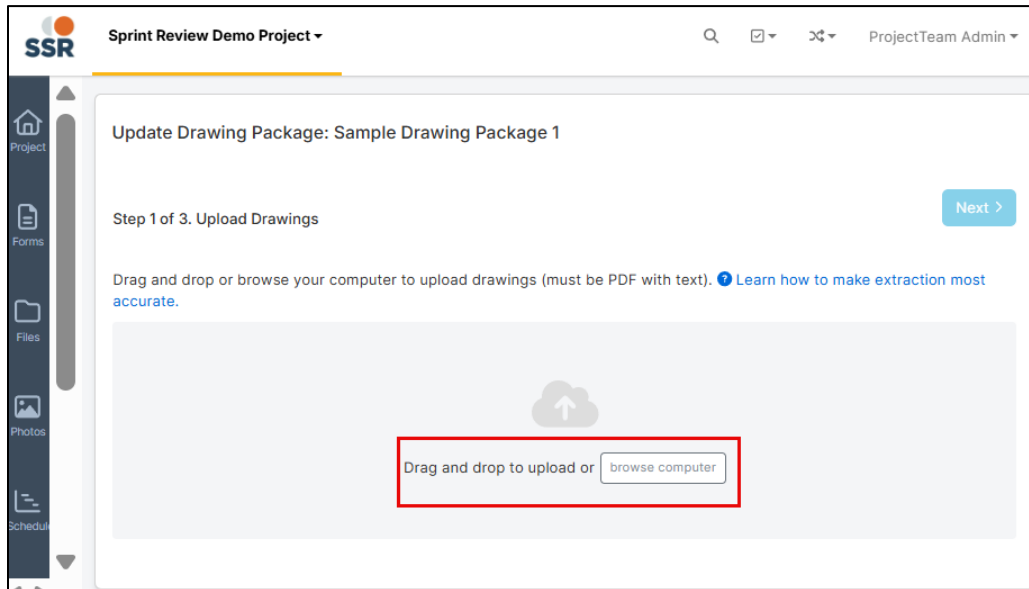
RELATED RESOURCES

Help Pages:

[Create a New Drawing](#)

[View Drawings in the Drawing Log](#)

[Filter the drawing log by discipline](#)

[Edit a Drawing](#)

[Create a Drawing Revision](#)

[Compare Drawing Revisions](#)

[Download drawings from the log](#)

[Create a Drawing Package Manually](#)

[Drawing Text Extraction (OCR)](#)

[Create a Drawing Package using Text Extraction](#)

[Edit a Drawing Package](#)

[Add markup annotations to a file](#)

Download and Upload Drawings from a Drawing Package

Related QRGs:

Drawings: Revising Drawings and Packages

Drawings: Viewing and Marking Up Drawings