

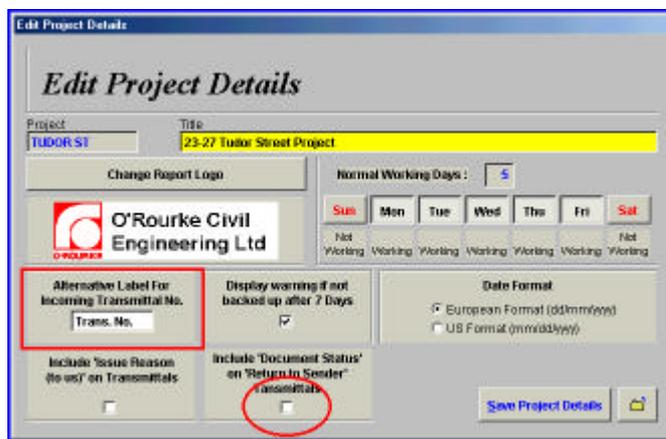
## Tracking Approvals in EasyDoc

Typically, users tracking approvals to any extent in EasyDoc start by changing the use and label of the incoming transmittal field. This is done by clicking on the 'Edit Project Details' button on the way into the project.



The screenshot shows the 'Select Project' dialog box. At the top, it says 'Project Selection Menu'. Below that, there are two input fields: 'Project No.' with the value 'TUDOR ST' and 'Title' with the value '23-27 TUDOR STREET PROJECT'. At the bottom left, the 'Edit Project Details' button is highlighted with a red box. At the bottom right, there is a 'Select Project' button and a small icon.

The label is marked in red below, and you should simply type in the box 'Stat Date' and then click on the 'Save Project Details' button.

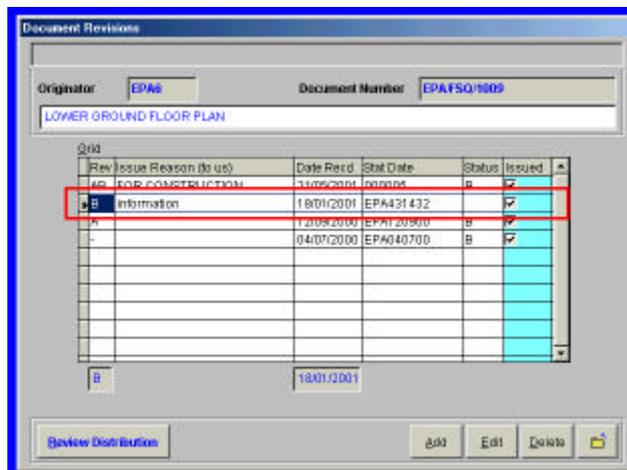


The screenshot shows the 'Edit Project Details' dialog box. The 'Project' field contains 'TUDOR ST' and the 'Title' field contains '23-27 Tudor Street Project'. There are several options: 'Change Report Logo', 'Normal Working Days' (set to 5), a calendar view, 'O'Rourke Civil Engineering Ltd' logo, 'Alternative Label For Incoming Transmittal No.' (with 'Trans. No.' selected), 'Display warning if not backed up after 7 Days' (checked), 'Date Format' (European Format selected), 'Include Issue Reason (to us) on Transmittals' (unchecked), and 'Include Document Status on Return to Sender Transmittals' (checked and circled in red). A 'Save Project Details' button is at the bottom right.

The idea of this is that you can now use the incoming transmittal box to record the Date at which you (O'Rourke in the examples shown) decided the document status as lead reviewer.

If you are expecting to return the documents which have been commented on, and print transmittals for the originators, you would probably want to tick the "Include 'Document Status' on 'Return to Sender' Transmittals" shown above circled in red.

To record the status a particular revision of a document, go to the main register and find the document of interest, then look for the specific revision.



The screenshot shows the 'Document Revisions' dialog box. It has fields for 'Originator' (EPA6) and 'Document Number' (EPAFSQ/509). Below these is a table with the following data:

Grid	Rev Issue Reason (to us)	Date Recd	Stat Date	Status	Issued
	AS FOR CONSTRUCTION	11/02/2001	00000	A	✓
	B Information	18/01/2001	EPA431432	B	✓
		12/09/2000	EPA120800	B	✓
		04/07/2000	EPA040700	B	✓

At the bottom, there is a 'Review Distribution' button and 'Add', 'Edit', 'Delete' buttons.

In the example, I've highlighted rev B, you should now click on the 'Edit' button and you will be presented with a window like the one below:

I've highlighted the two boxes you need to complete, notice that the label for the 'Stat Date' has now replaced the standard one of 'Trans No.'

When you have completed the details, simply click on the 'Save' button.

If you now issue this document BACK TO THE ORIGINATOR, EPA6 in the example above, the transmittal will reflect the status that you have assigned to the document.

Now while that deals nicely enough with recording just one comment / status on a document – it will not meet your need to record other people comments (i.e. three or four people from the design team). To do this, most users record the other returned comments & status codes in the Documents comments box, which is available from the main register:

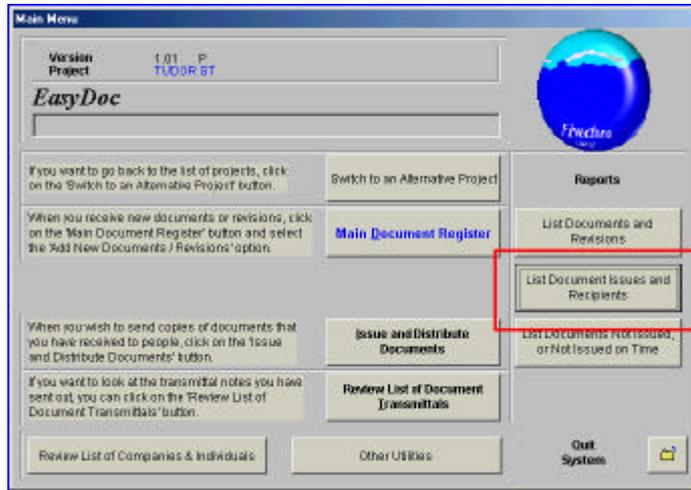
Originator	Document No.	Title	Status
EPA6	EPAFSQ1009	LOWER GROUND FLOOR PLAN	A3 D
EPA6	EPAFSQ1010	GROUND FLOOR PLAN	A1 D
EPA6	EPAFSQ1011	FIRST FLOOR PLAN	A4 D
EPA6	EPAFSQ1012	SECOND FLOOR PLAN	A1 B

Simply click on the button labelled 'Comments' and you will be presented with a window like the one below:

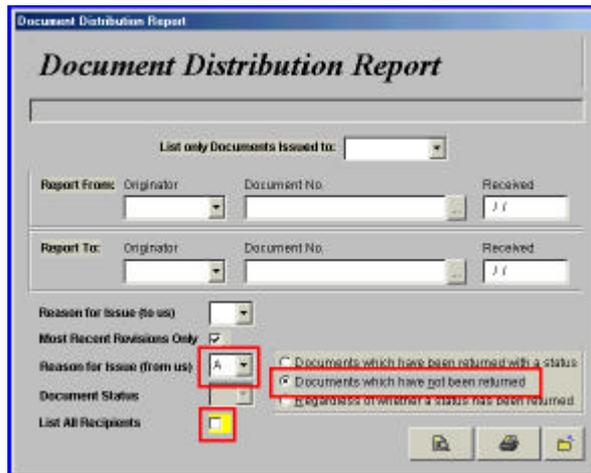
You then type in comments like the one shown in the example, always putting the newer revisions at the top, and entering each recipients comment as they send them back to you (assuming of course that they do!).

In order to manage the whole process, you will also need to run reports. The main one is a list of documents which have been issued for approval, but not yet returned.

To get this list, you must first have issued the documents using a standard code for 'Approval' typically this would be 'A', but it is user-definable – so yours could well be different. If you have done this, you can select the 'List Document Issues and Recipients' from the main menu.



When you do this, EasyDoc will present a window like the one below:



The key criteria have been highlighted, but you will probably want to select an individual or 'Lead Approver' (such as the architect or engineer or client) and enter their code in the 'List only Documents Issued to:' field at the top of the window.

- Reason for Issue (from us)** - Enter the code for your 'for approval' issues.
- Documents which have not been returned** - Select this to get the outstanding documents only.
- List All Recipients** - You probably want to set this blank – otherwise you will see every one who got the document for the reason you specified.

Note that by default, the printed report will only include the most recent revisions – it is unusual to manage the approval of 'old revisions'.

When you are ready, click on one of the print buttons to get the report.