

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:

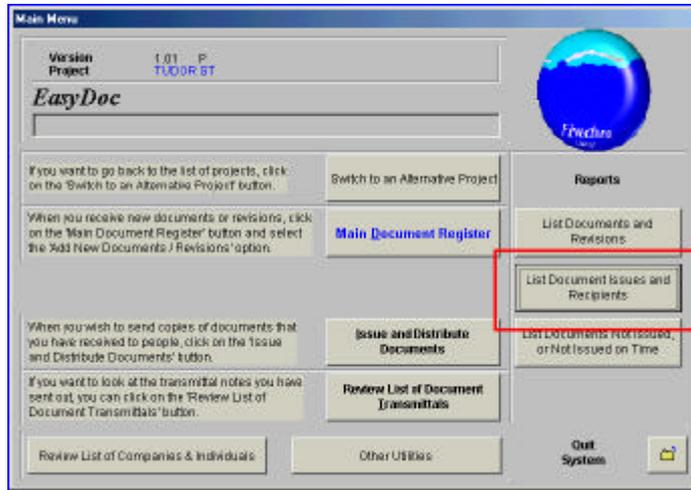
EPA6	EPAFSQ/009	AB	LOWER GROUND FLOOR PLAN	A3	D
EPA6	EPAFSQ/010	AB	GROUND FLOOR PLAN	A1	D
EPA6	EPAFSQ/011	A1T	FIRST FLOOR PLAN	A4	D
EPA6	EPAFSQ/012	C	SECOND FLOOR PLAN	A1	B

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

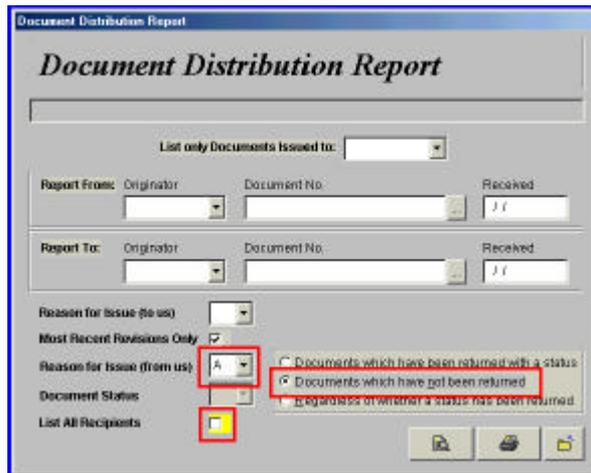
You then type in comments like the one shown in the example, always putting the newer revisions at the top, and entering each recipients comment as they send them back to you (assuming of course that they do!).

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.