Creating Drawings and Packages

Drawings are used to develop and communicate ideas about a developing design. A Drawing Package is a group of one or more drawing items.
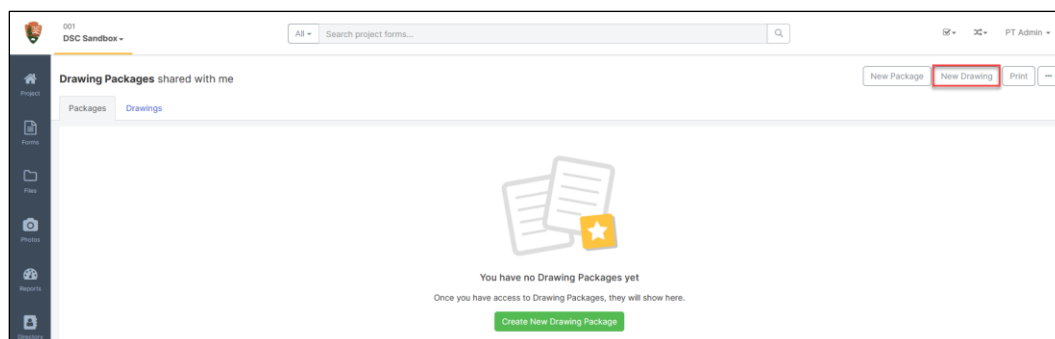
Manually Create a New Drawing
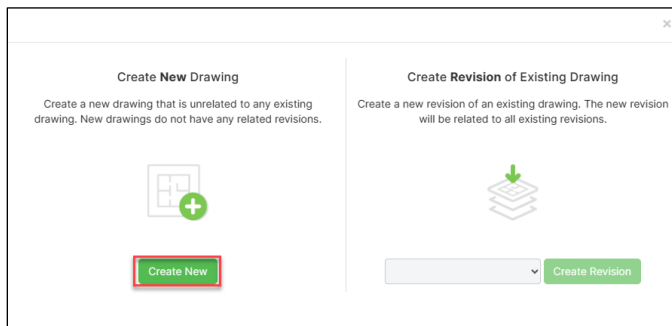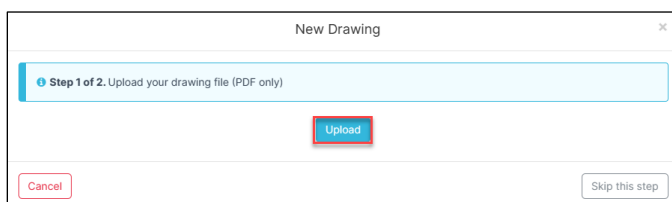Drawings can be managed individually or grouped in a Package.

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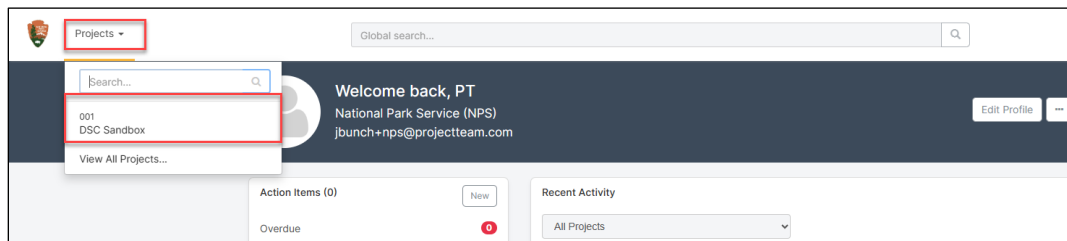
2. Open **Drawings** from the options that open after clicking on **Forms** in the left navigation pane.
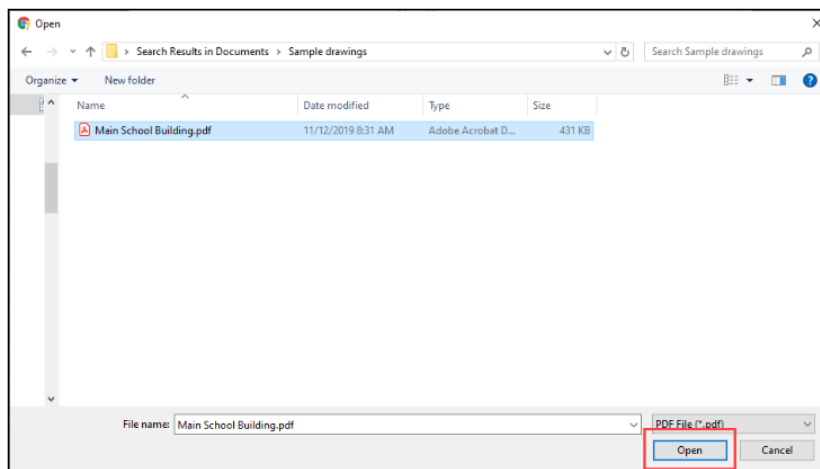3. Click **New Drawing**.

4. Select **Create New** from the *Create New Drawing* side of the window.

5. To upload the actual drawing file, click the **Upload** button in the *New Drawing* window.

6. 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.

7. Once the upload are complete, click the **Next** button located in the bottom right corner.
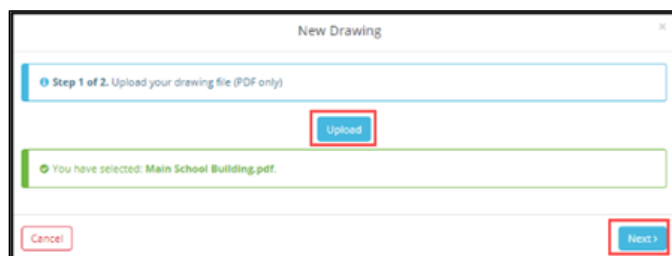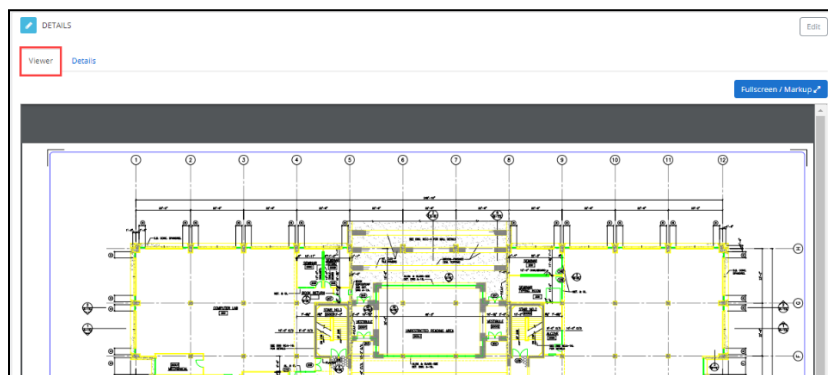
8. The Drawing form will open. Enter the required information in the **Subject** and **Drawing #** fields. The remaining fields are optional but the information captured in these fields will be very helpful in creating robust reports about your drawings.
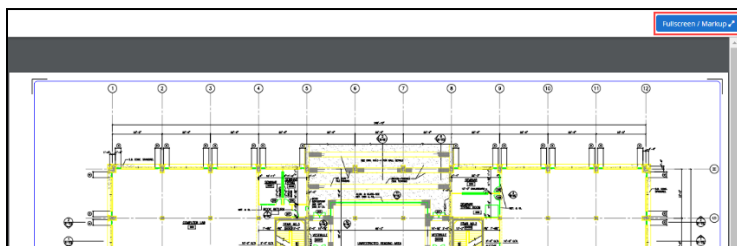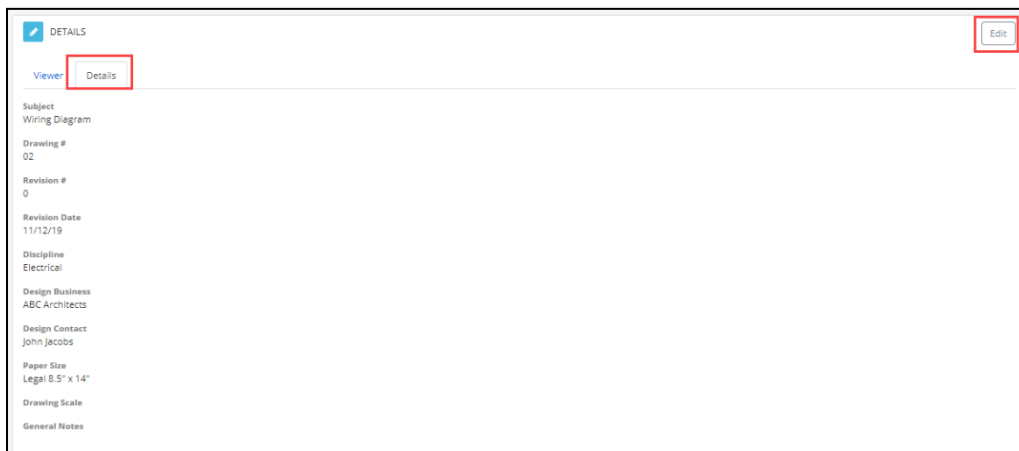

8. **Save** the record.
9. The *Drawing* record will open with a preview of the file in the **Viewer** tab of the *Details* pane.

10. 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 (projectteam.com).*

11. To view the drawing information, click the **Details** tab. To edit the record, click the **Edit** button.


12. 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.**


- **List View** allows the user to see a list of records. This list can be configured to show different fields in the grid. To learn more about customizing a documents log, please refer to the *Configure Log QRG.*

 Click the **checkbox** above the grid to view the latest revisions of each document.
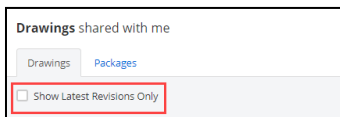
- **Thumbnail View** allows the user to see small images of the drawing documents listed by Discipline. To open a drawing click the thumbnail. To filter by Discipline, click the **dropdown arrow** for the discipline filter field.
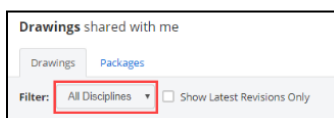
Edit the Drawing Record

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
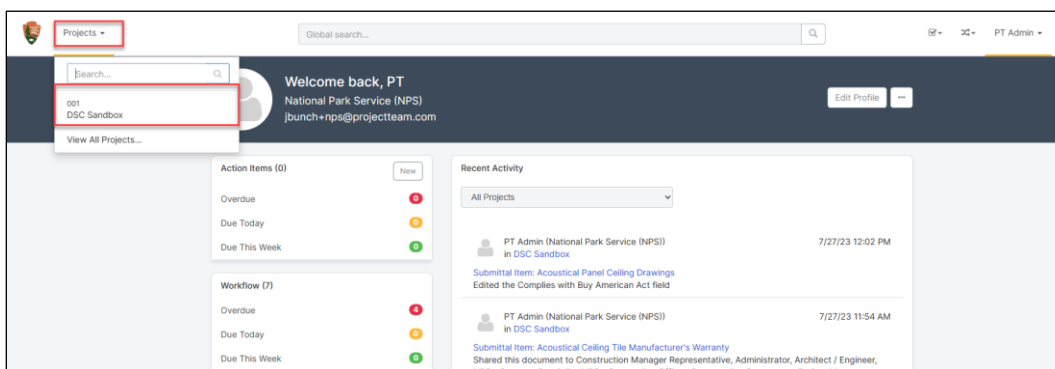   **Edit** button in the *Details* section.
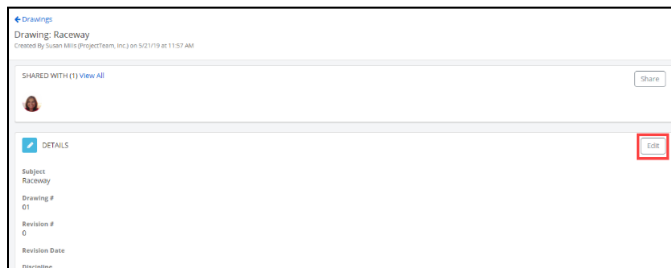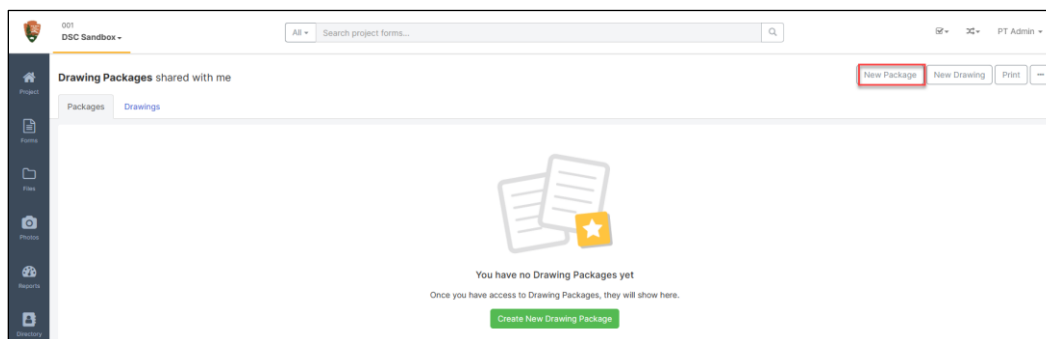

3. Make your changes and **Save** the record.

Manually Create a New Drawing Package
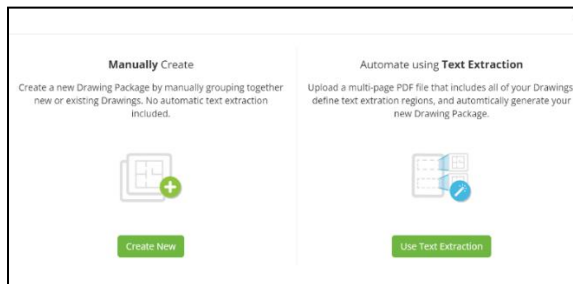A drawing package is a group of one or more drawing items.

1. Open the project.

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

4. Select **Manually Create** from the window that opens.

5. The *Drawing Package* form will open. Enter the required information in the **Subject** field. The **General Notes** field is optional.
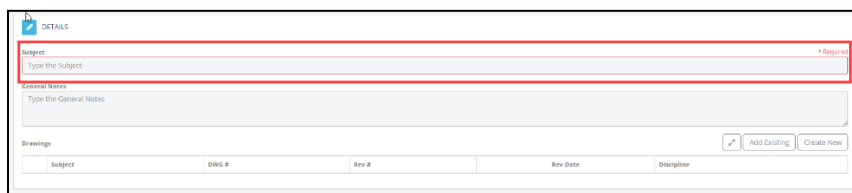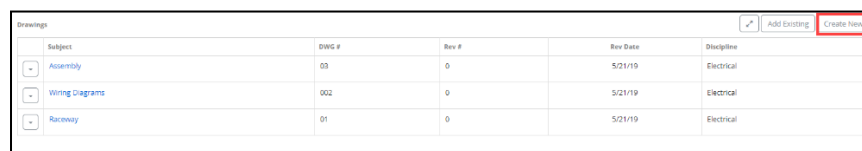

6. To add individual *Drawings* which already exist in ProjectTeam to the package, click the **Add Existing** button.

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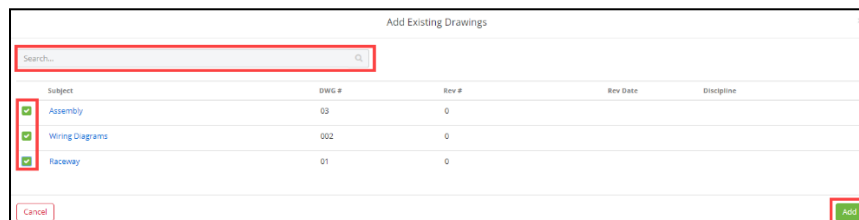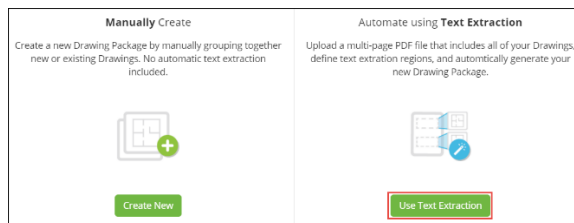

8. If adding a drawing to the package which *does not* exist in ProjectTeam, click the **Create New** button.
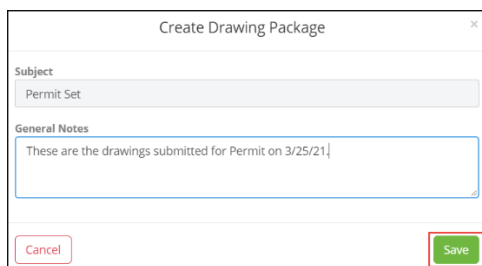
9. **Save** the record.


Create a New Package Using Text Extraction

1. Repeat steps 1-3 from above.
2. Click **Use Text Extraction** from the window that opens.

3. The *Drawing Package* form will open. The **Subject** field is required, and **General Notes** are optional.
4. **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**.
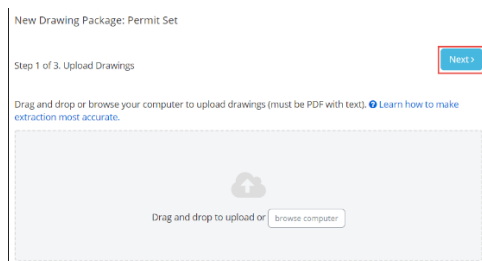
7. Click **Define Regions** to identify the locations on the drawings for text extraction.
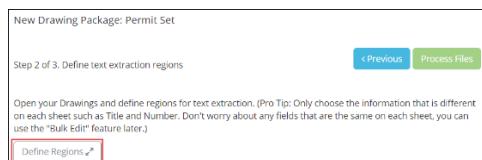
8. Click on the **Square with the +** to select a region, click and drag the yellow box over the desired region.
9. Select the field to add by clicking on the radio button in the list, and click **Add**. Repeat as needed for all desired fields.
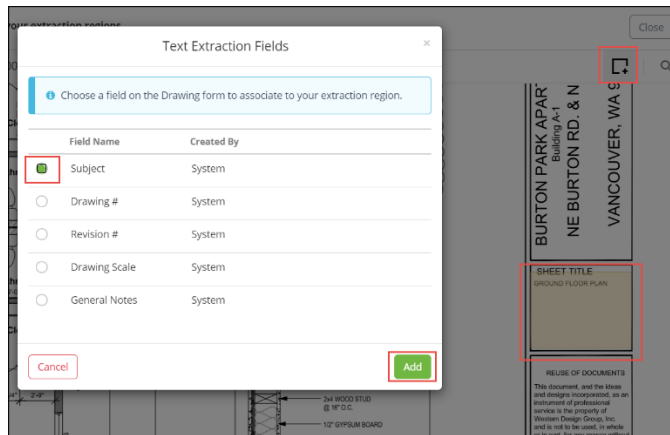

10. Click **Close.**
11. Click **Process Files.**
12. Click **View Drawings Log.**

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.
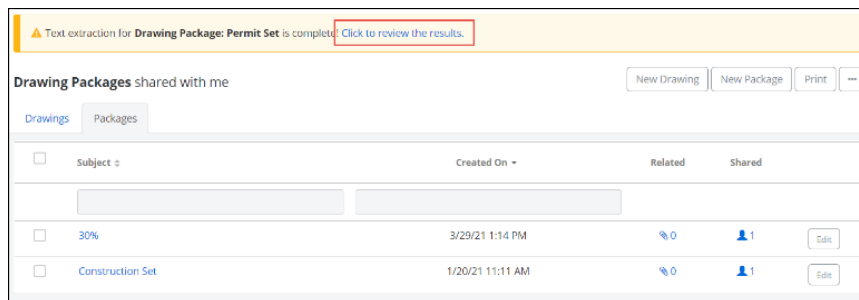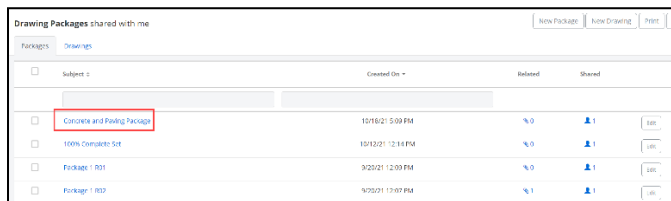

13. Review the results for the first drawing. Make corrections as needed.
14. When satisfied with a drawing click **Confirm & Next**.
15. Repeat for each drawing.
16. When all drawings have been confirmed click **Finish and Create Package**.
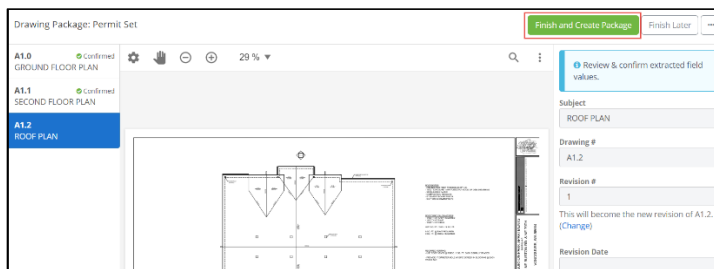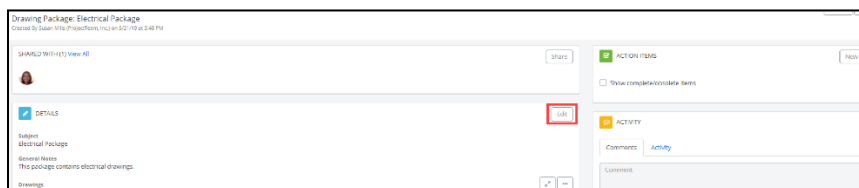
Edit the Drawing Package Record

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, click the **Edit** button in the *Details* section.


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

Download or Upload Drawing Documents from the Package

1. 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**.
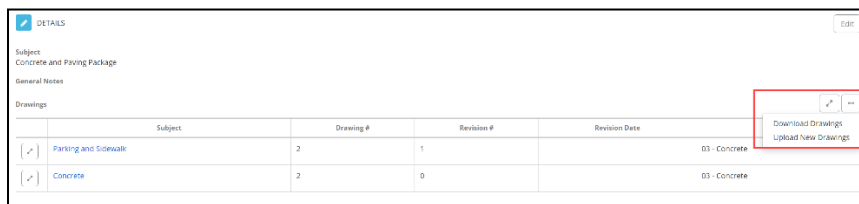
2. When downloading, the drawing documents will download in a zip file to the *Downloads* folder on your computer.
3. When uploading, you can drag and drop your new drawings or click **browse computer**.
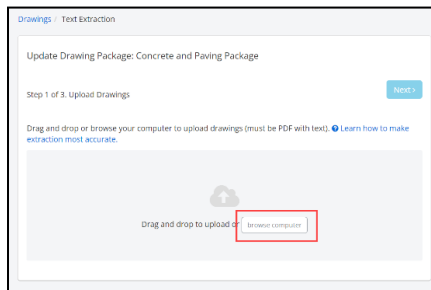
References

- **Help Center Links**
  - [Create a Drawing Package Manually (projectteam.com)](projectteam.com)
  - [Create a Drawing Package using Text Extraction (projectteam.com)](projectteam.com)
  - [Download and Upload Drawings from a Drawing Package (projectteam.com)](projectteam.com)
  - [Edit a Drawing Package (projectteam.com)](projectteam.com)
- **Quick Reference Guides (QRGs) and Training Videos**
  - Sharing Records
  - Initiating and Completing a Workflow
  - Creating Action Items
  - Making Comments
  - Adding Reference links
  - Running Reports
  - File Management Overview
  - Photo Management
  - Creating RFIs
  - Creating Submittals
  - Creating Drawings and Packages
  - Creating Meeting Minutes
  - Creating Daily Reports
  - Creating Punchlists