



**Quick guide for drawing management in an active
folder with workflow**

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QUICK GUIDE FOR DRAWING MANAGEMENT IN AN ACTIVE FOLDER WITH WORKFLOW

This functionality exists in INTERAXO Construction Module and INTERAXO Business Module.

Revision of drawings are handled in an active folder with workflow where the latest revision of the drawing will be published to a separate folder (" Published ") and previous revisions are archived in a separate historical folder (" Historical ") . One may use the approval process with several steps in the drawing management folder.

The process is recommended in the construction phase in projects with many actors or when the need for an interdisciplinary control is needed.

Advantages with drawing management in an active folder with workflow

- You can add multiple drawings simultaneously and update revision information for all at the same time
- Revision number (rev.no) and current revision date are evident
- A good overview of multiple drawings
- You can sort your data by choosing Type or any other field

1 STEP BY STEP - IMPORT OF DRAWING LIST AND IMPORT OF FILES

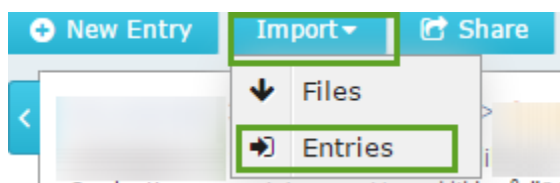
Drawing management with revision and publication consists of four main sections:

- Import of drawing list or create new entries
- Upload drawings
- Publish current drawings
- New revisions of drawings

1.1 Import entries

To create new entries via the import function:

1. Go to the drawing folder and click on the button "**Import**" from the main menu and then "**Entries**". You can also right click on the drawing folder and select "**Import - Entries**."



2. Enter the metadata from an existing drawing list in Excel by dragging and dropping or by copy the data from Excel to INTERAXO.

PS! In order to enhance the import of entries, the fields in INTERAXO must match with the fields in Excel datasheet. The fields must have the order, punctuation and capitalization. If there is no match, one can use the drop down lists in the import window and select the correct value(s). If a field is mandatory in INTERAXO, the Excel datasheet must contain data in this / these field(s).

Sample fields in INTERAXO:

Drawing no	Title	Type	Discipline	Format	Scale	Rev no	Rev date
------------	-------	------	------------	--------	-------	--------	----------

Sample fields in Excel:

Drawing no	Title	Type	Discipline	Format	Scale	Rev no	Rev date
B-100-04	Building 3 - Roof	Details	ARK	A3	1:10		
B-101-03	Building 3 - Overview	Overview	ARK	A3	1:10		

Drag and drop or copy your data from Excel:

- Open the Excel file and select the area that contains the data you want to import. Place the cursor on one of the side edges of the highlighted area and drag and drop the data into INTERAXO.

or

- Press CTRL + C in Excel to copy the highlighted area, switch to INTERAXO and press CTRL + V to paste the data.

All fields except drawing number are editable. Here you can enter revision number or other information that can be corrected directly in the import window.

Import
?

Remove selected rows

	Drawing no	Title	Type	Discipline	Format	Scale	Rev no	Rev date
<input checked="" type="checkbox"/>	B-100-04	Building 3 ...	Details	ARK	A3	1:10		
<input type="checkbox"/>	B-101-03	Building 3 ...	Overview	ARK	A3	1:10		

Import

Cancel

If you need to remove entries, select the entries and select **"Remove selected rows"**.

Import ?

Remove selected rows

<input type="checkbox"/>	Drawing no	Title	Type	Discipline	Format	Scale	Rev no	Rev date
<input checked="" type="checkbox"/>	B-100-04	Building 3 ...	Details	ARK	A3	1:10		
<input type="checkbox"/>	B-101-03	Building 3 ...	Overview	ARK	A3	1:10		

Import
Cancel

- Click **"Import "** and **" OK "** The entries are now uploaded and will appear in the step you imported them.

<input checked="" type="checkbox"/>	B-100-04	Building 3 ...	Details	ARK	A3	1:10
<input type="checkbox"/>	B-101-03	Building 3 ...	Overview	ARK	A3	1:10

Import
Cancel

Importing entries ×

2 of 2 entries will be imported.
Press OK to go ahead and import the entries

OK
Cancel

1.2 Import drawings

You can now import files to attach to the entries you recently imported.

- Click **"Import Files"**

+ New Entry
Import ▾
Share

Files

Entries

We recommend you to match against drawing number as this should be unique. The file name must be equal to the drawing number. INTERAXO proposes the next revision number automatically and the revision date is set as the current date. This can be changed if necessary.

2. Select the field you want to match with the imported files. Here it is common to use the field **Drawing number**. Then choose " **Add File** "

Import files to entries

Which field should match the file name?

Drawing no + Add file

Partial match on filename

<input type="checkbox"/>	File	Drawing no	Title	Type	Discipline	Format	Scale	Rev no	Rev date
--------------------------	-------------	-------------------	--------------	-------------	-------------------	---------------	--------------	---------------	-----------------

Mark all files you want to attach. Hold the Shift key down to select multiple files.

Name	Date modified	Type	Size
B-100-04	13.08.2013 09:25	Adobe Acrobat D...	175 KB
B-101-03	13.08.2013 09:25	Adobe Acrobat D...	175 KB
B-200-03	13.08.2013 09:25	Adobe Acrobat D...	175 KB
B-201-00	13.08.2013 09:25	Adobe Acrobat D...	175 KB
B-202-00	27.10.2014 17:50	Adobe Acrobat D...	78 KB
B-400-00	13.08.2013 09:25	Adobe Acrobat D...	175 KB
B-401-03	13.08.2013 09:25	Adobe Acrobat D...	175 KB
B-402-02	27.10.2014 17:50	Adobe Acrobat D...	78 KB
B-403-03	13.08.2013 09:25	Adobe Acrobat D...	175 KB
B-404-03	13.08.2013 09:25	Adobe Acrobat D...	175 KB

File name: "B-400-00" "B-100-04" "B-101-03" "B-200-03" "B-201-00" "B-202-00" All Files

Open
Cancel

1.3 Partial match on filenames

It is now possible to receive partial results of a filename when importing files. By setting a rule, the system ignores part of the file name. This saves the advisors from renaming files to meet previous requirements in INTERAXO. Note that this only works for the last part of a file name.

E.g.

The filename is **B-100-04_RevA**. You want to search results against an entry called B-100-04. Check off for "Partial results in filename" in the import window and enter the desired character (it can be characters, numbers or letters) you want the system to ignore , e.g. _ in this case.

Import files to entries ?

Which field should match the file name?

Drawing no

Partial match on filename
Ignore everything from the last occurrence of character:

<input type="checkbox"/>	File	Drawing no	Title	Type	Discipline	Format	Scale	Rev no	Rev date	Step
--------------------------	------	------------	-------	------	------------	--------	-------	--------	----------	------

The system will then ignore everything starting with _ and search for hits starting with **B-100-04**.

Import files to entries ?

Which field should match the file name?

Drawing no

Partial match on filename
Ignore everything from the last occurrence of character:

<input type="checkbox"/>	File	Drawing no	Title	Type	Discipline	Format	Scale	Rev no	Rev date	Step
<input type="checkbox"/>	<input checked="" type="checkbox"/> B-100-04_RevA.pdf	B-100-04	Buil... Details	ARK	A3	1:10	A01	02/11/2015	Rådgiver	
<input type="checkbox"/>	<input checked="" type="checkbox"/> B-101-03_RevA.pdf	B-101-03	Buil... Over...	ARK	A3	1:10	A01	02/11/2015	Rådgiver	

When you have added the files, you will see which files the system found matches for existing entries by showing a green check off mark. If you want to do changes in your data before you import, this can be done directly in the import window.

Import files to entries ?

Which field should match the file name?

Drawing no

Partial match on filename
Ignore everything from the last occurrence of character:

<input type="checkbox"/>	File	Drawing no	Title	Type	Discipline	Format	Scale	Rev no	Rev date	Step
<input type="checkbox"/>	<input checked="" type="checkbox"/> B-100-04_RevA.pdf	B-100-04	Buil... Details	ARK	A3	1:10	A01	02/11/2015	Rådgiver	
<input type="checkbox"/>	<input checked="" type="checkbox"/> B-101-03_RevA.pdf	B-101-03	Buil... Over...	ARK	A3	1:10	A01	02/11/2015	Rådgiver	

1.4 Publishing

In order to publish a current drawing, please select the entries you want to publish by clicking **More options** - **Publish**. The drawings will then be available for anyone who has access to the published drawings.

	Drawing no	Title	Type	Discipline
✓ [grid] [lock] [link]	B-101-03	Building 3 - Overview	Overview	ARK
✓ [grid] [lock] [link]	B-100-04	Building 3 - Roof	Details	ARK

1.5 Revisions

There are two different ways to revise drawings in INTERAXO.

Alternative 1.

Import a new revision with automatic revision management. This is managed the same way as the first time an import of drawings is carried out.

1. Click **"Import"** and **"Files"**
2. Add files to be revised

Import files to entries ?

Which field should match the file name?

Drawing no

Partial match on filename

<input type="checkbox"/>	File	Drawing no	Title	Type	Discipline	Format	Scale	Rev no	Rev date	Step
<input type="checkbox"/>	✓ B-100-04.pdf	B-100-04	Buil... Details	ARK	A3	1:10	A02	02/11/2015	Accepted	
<input type="checkbox"/>	✓ B-101-03.pdf	B-101-03	Buil... Over...	ARK	A3	1:10	A02	02/11/2015	Accepted	

[Close](#)

The files will then find matches in existing entries and will show a yellow check off mark. The files are created as new revisions of the files. The system therefore suggest automatically the next revision number and the current date revision number. If needed, this can be overridden.

- Click **"Import"** and the new revision will be imported while the previous revision is automatically moved to the historical folder (**"Historical"**). The drawings in the published folder (**"Published"**) will show a yellow flag that will indicate that there is a new revision coming.

All
2

Consult...
2

Control
0

Accepted 🔒
0

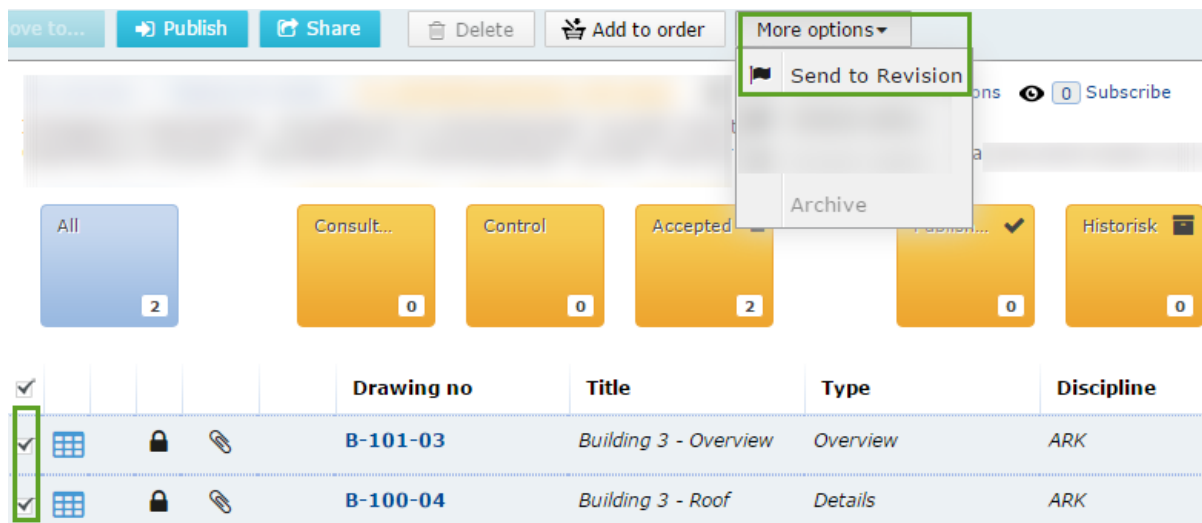
Publish... ✓
2

<input type="checkbox"/>			Drawing no	Title	Type	Dis	
<input type="checkbox"/>				B-101-03	Building 3 - Overview	Overview	ARK
<input type="checkbox"/>				B-100-04	Building 3 - Roof	Details	ARK

Alternative 2:

"Send to revision" is used where one wishes to emphasize there is a new revision on its way before one imports new files. In cases where the period before a drawing has been ordered and until it has been produced, this can be useful.

- Mark the entry and click **More options** and **Send to revision**. The entries will automatically be moved to the first step. You can import a new revision in the same way as for importing drawings.



2. Click "Import Files" and add the new revised drawings. The dialog box that opens displays the updated revision number and the revision date.

3. If a drawing has a yellow flag in the folder Published, this means there will be a new revision coming in.