



Section 20

Drawing Sets

ORACLE Primavera

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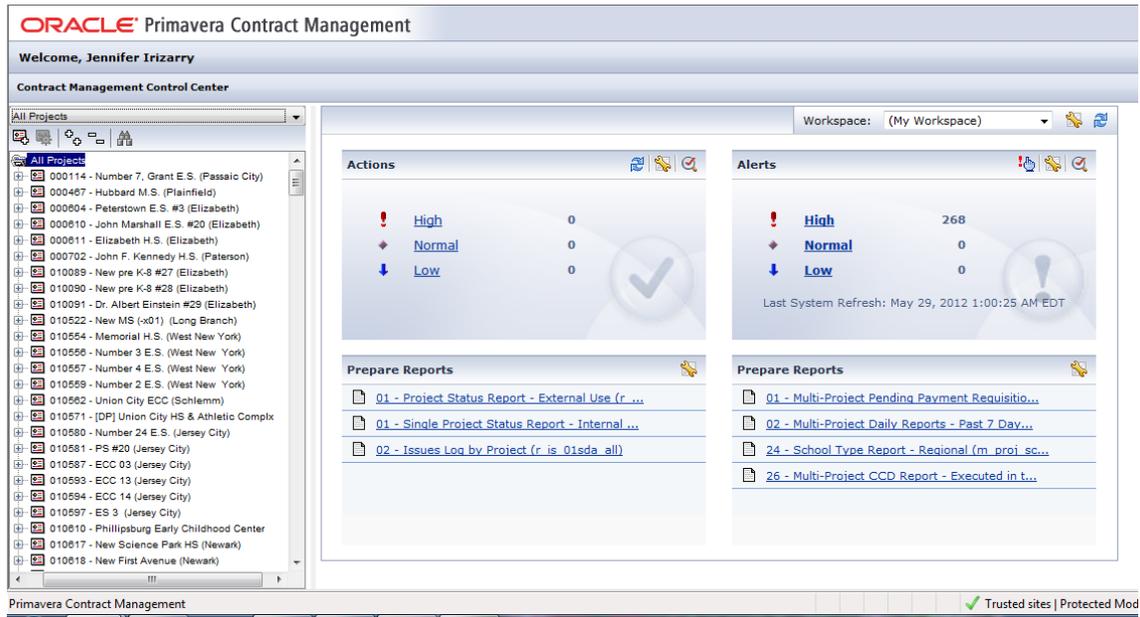
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I. Drawing Sets

The SDA’s staff will be using the Drawing Sets module as a library system to track the location of drawings within the Project Management drawing library and to assist in identifying the location of hardcopy drawing sets.

A. Add a Drawing Set Record

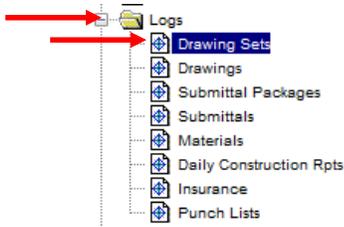
1. Once logged into Primavera, the **Contract Management Control Screen** displays (as shown).



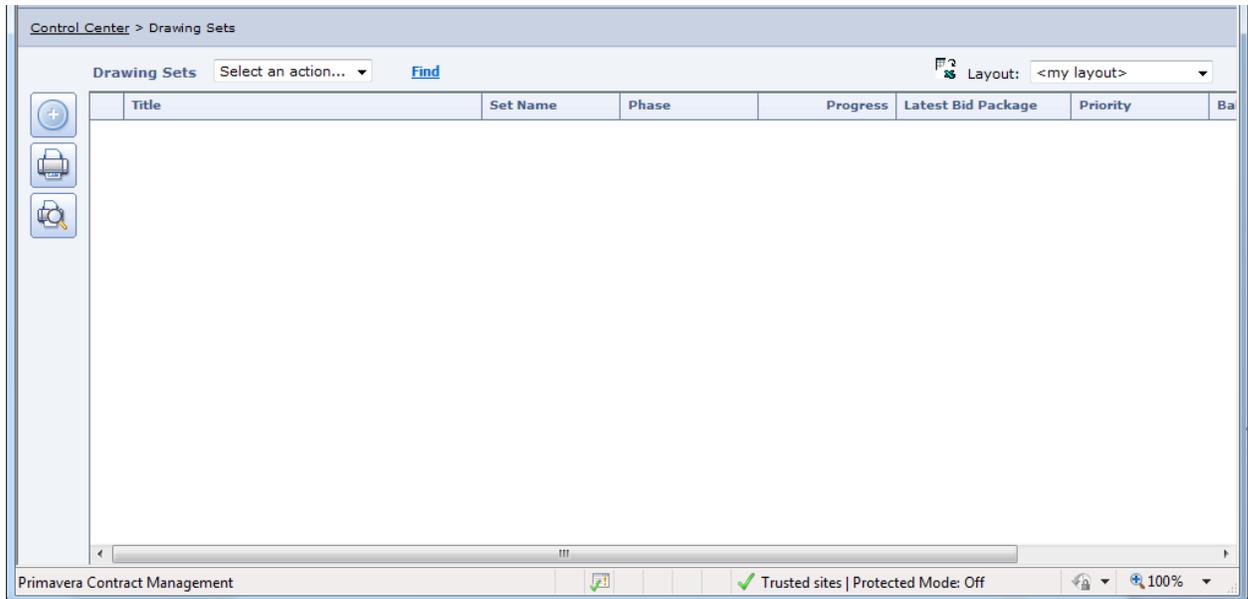
2. Select your desired project.



3. Open the **Logs** folder (a list of modules will display) and select **Drawing Sets**.

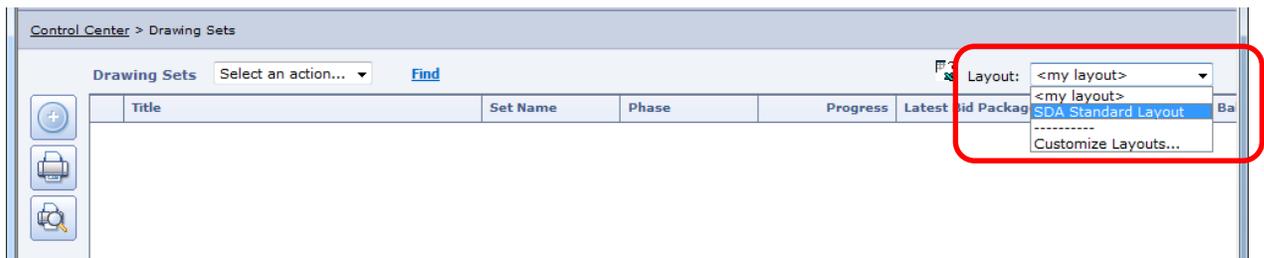


4. The Drawing Sets **log view** displays.



Layouts are used to define a filter, sort, and group items in a log view. A custom layout has been created for the Drawing Sets log view to assist in viewing the information entered in this module. Once the custom layout has been applied, it is advisable to examine the information in this log before adding a new record to avoid duplicate entry.

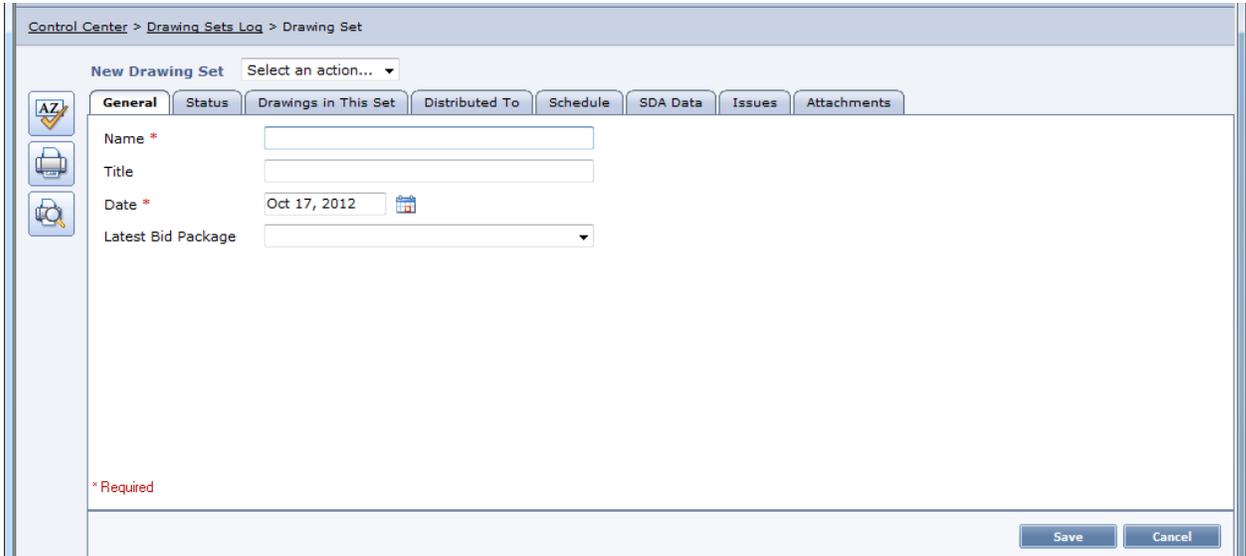
5. To apply the custom layout, open the **Layout** pull down menu located in the upper right hand corner of the screen and choose the **SDA Standard Layout** option. The Log View columns will change from the default columns to the custom view columns.



6. Click the **Add Document** button to add a new Drawing Set.



7. A blank Drawing Set document displays.



8. On the **General** tab, enter the following information.

Control Center > Drawing Sets Log > Drawing Set

New Drawing Set Select an action...

General Status Drawings in This Set Distributed To Schedule SDA Data Issues Attachments

Name *

Title

Date * Oct 17, 2012

Latest Bid Package

* Required

Save Cancel

- **Name** – Enter the type of drawing (i.e., Full Size or Half Size, Arch, Eng, Arch & Eng etc.) (35 character limit) **Note:** This field displays in all capital letters.
- **Title** – Enter the phase/progress of the drawing (i.e., 75% CD Submission, DCA Submission Phase 3, etc.) (255 character limit)
- **Date** – Enter the date of the hard copy drawing submission set
- **Latest Bid Package** – Not currently used

9. An example of a completed General tab is shown.

Control Center > Drawing Sets Log > Drawing Set

New Drawing Set Select an action...

General Status Drawings in This Set Distributed To Schedule SDA Data Issues Attachments

Name * FULL SIZE ARCH

Title DOE Coments Revision 1

Date * Oct 17, 2012

Latest Bid Package

* Required

Save Cancel

10. Click the **Status** tab and enter the following information.

Control Center > Drawing Sets Log > Drawing Set

New Drawing Set Select an action...

General **Status** Drawings in This Set Distributed To Schedule SDA Data Issues Attachments

Ball in Court <none selected>

Priority Normal

Phase

Progress 0

Save Cancel

- **Ball in Court** – This field will be used to show the current location of a drawing. For example, if a Project Management staff member has taken the drawing for review, the Ball in Court would be changed to that person’s name. If the drawing is in the library, the Ball in Court will show **Drawing Library**. Click the **select button** next to the field to choose either a staff members name or the Drawing Library option from the contact list.
- **Priority** – Will always be **Normal** (this should not be changed)
- **Phase** – Select the phase (as applicable) from standard drawing phases drop down list
- **Progress** – Enter the percent progress on the status of the drawing set

11. An example of a completed Status tab is shown.

The screenshot shows the 'New Drawing Set' form with the 'Status' tab selected. The form contains the following fields:

- Ball in Court:** New Jersey Schools Development Auth Drawing Library
- Priority:** Normal
- Phase:** Approved for Construction
- Progress:** 100

Buttons for 'Save' and 'Cancel' are visible at the bottom right.

12. The following tabs are currently not being used in this module.

The screenshot shows the 'New Drawing Set' form with the 'Status' tab selected. The tabs 'Drawings in This Set', 'Distributed To', and 'Schedule' are highlighted with a red box, indicating they are not currently being used.

13. Click the **SDA Data** tab and complete the following:

The screenshot shows the 'New Drawing Set' form with the 'SDA Data' tab selected. The form contains the following fields:

- Location:** [Empty text box]
- Comments:** [Empty text box]

Buttons for 'Save' and 'Cancel' are visible at the bottom right.

- **Location** – This is the location of the cubby/rack/archive box number for this document (255 character limit).
- **Comments** – Enter any additional comments regarding set issues as needed (255 character limit).

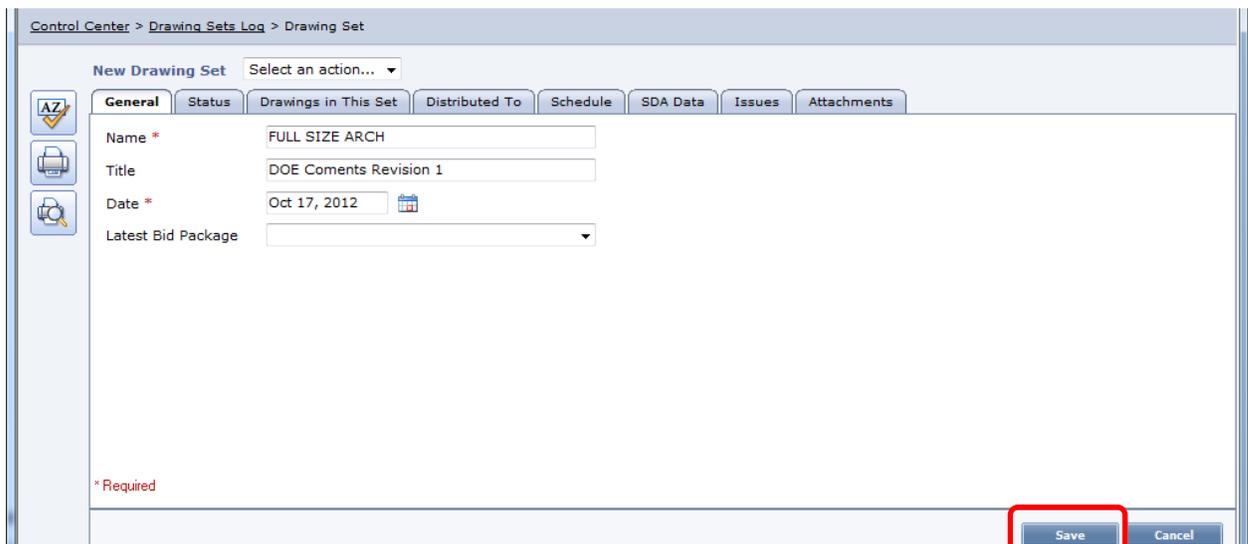
14. An example of a completed SDA Data tab is shown.



15. The following sections are currently not being used in this module.



16. When all sections of the Drawing Set document have been completed, click the **Save** button at the bottom of the screen.

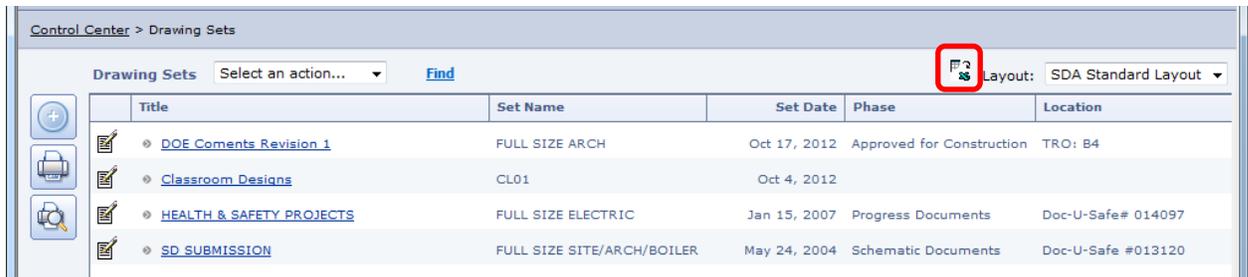


B. Exporting Data from the Drawing Sets Log View

It may be desirable to export this log view for reporting purposes. All log views can be exported to Excel. Once exported, you can manipulate the summary information to create a customized report.

IMPORTANT: Information can only be exported from Contract Management. You cannot import or upload information into the system.

1. To export a log view, click the **Excel icon** located on the upper right hand corner of the screen.



2. If you receive the following error message after you click the icon, perform the steps listed below:



- Add <http://pe.njsda.gov> to Trusted Sites Zone (bookmarks).
- a) Go to Tools -> Internet Options -> Security -> Trusted Sites (Green Circle)
 - b) Click **Sites** Button
 - c) Uncheck require [https:](https://) on the bottom of the Trusted Sites page
 - d) Add <http://pe.njsda.gov>
 - e) Close and re-open your browser.
3. If Microsoft Excel still does not open, contact the PE Helpdesk (pehelpdesk@njsda.gov) to assist in troubleshooting your Internet browser settings.
 4. If no error message displays, Microsoft Excel will automatically open and display the log view information. You can now manipulate this output as desired to create your customized report.

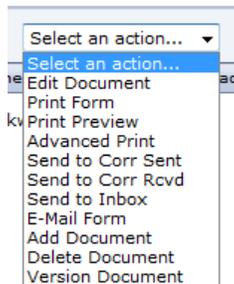
II. Version Document

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

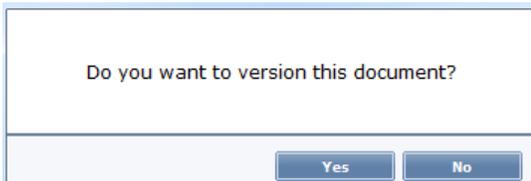
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

A. Create a Document Version

1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.



3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.

