

ePM Quick Reference Guide #051

Design Documents Creation Wizard

WHAT IS...

The Design Documents Creation Wizard is used to create up to 500 design documents at a time. This wizard is available by clicking **Tools** in the design documents register. Documents created in this way will appear as normal in the registers.

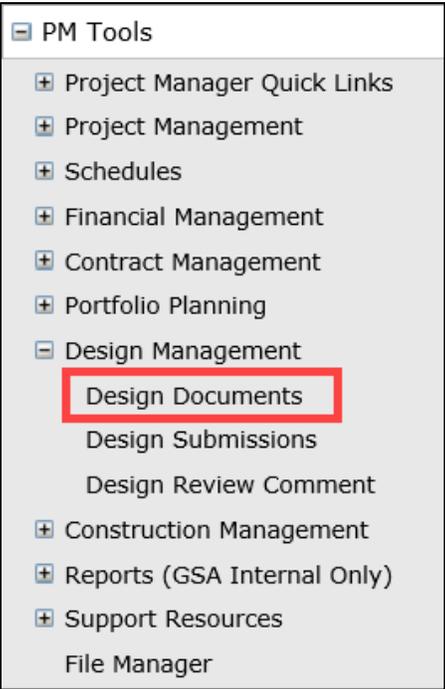
Follow the instructions on the wizard to create the documents. When the wizard is complete, the user can edit the documents to add more information, or run the wizard again to add more documents.

WHO USES...

- Construction Manager
- Architect/Engineer
- Project Manager

How To...

1. Log into ePM as a user with the appropriate security category to create Design Documents, and then navigate to the appropriate project.
2. Navigate to PM Tools > Design Management > Design Documents to display the Design Documents Register.



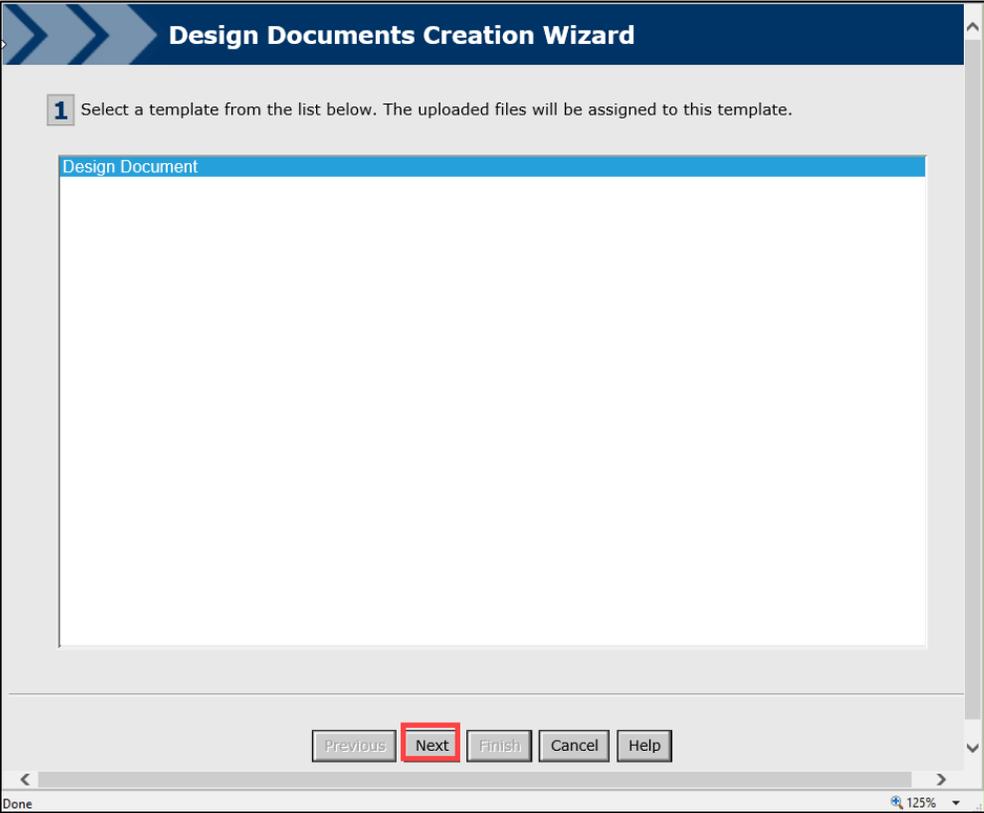
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3. Click the 'Tools' button and select 'Design Documents Creation Wizard' to launch the wizard.



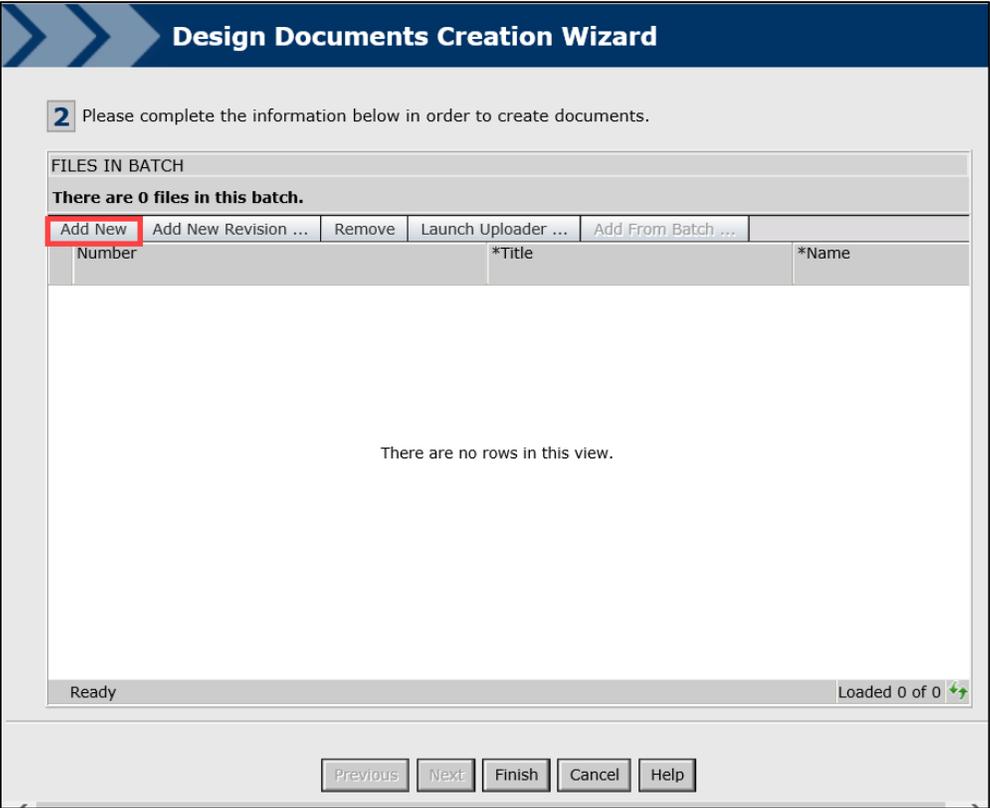
4. Select 'Design Documents' and click Next.



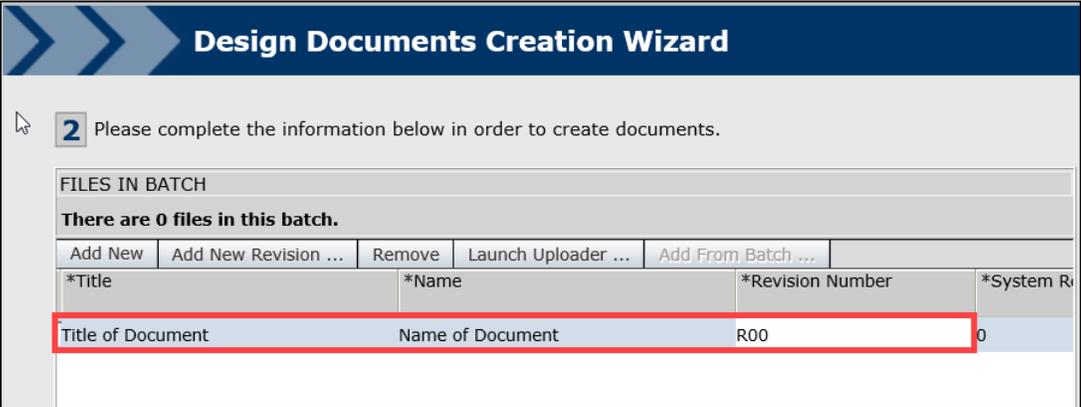
5. Click the 'Add New' button to add a row or click multiple times to add multiple rows to the grid.

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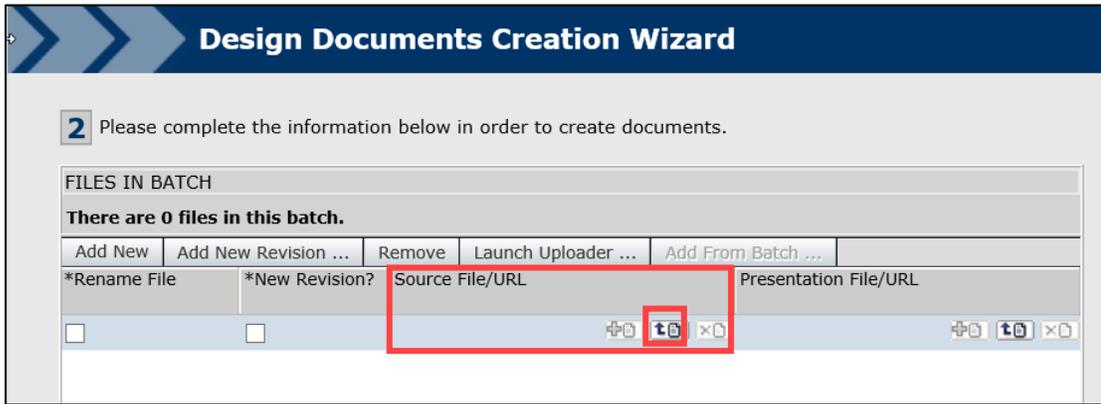
6. In the 'Title' field, enter the name of the drawing.
7. In the 'Name' field enter the sheet number of the drawing
8. In the 'Revision Number' enter or update the revision of the drawing. Note: this field will default to R00.



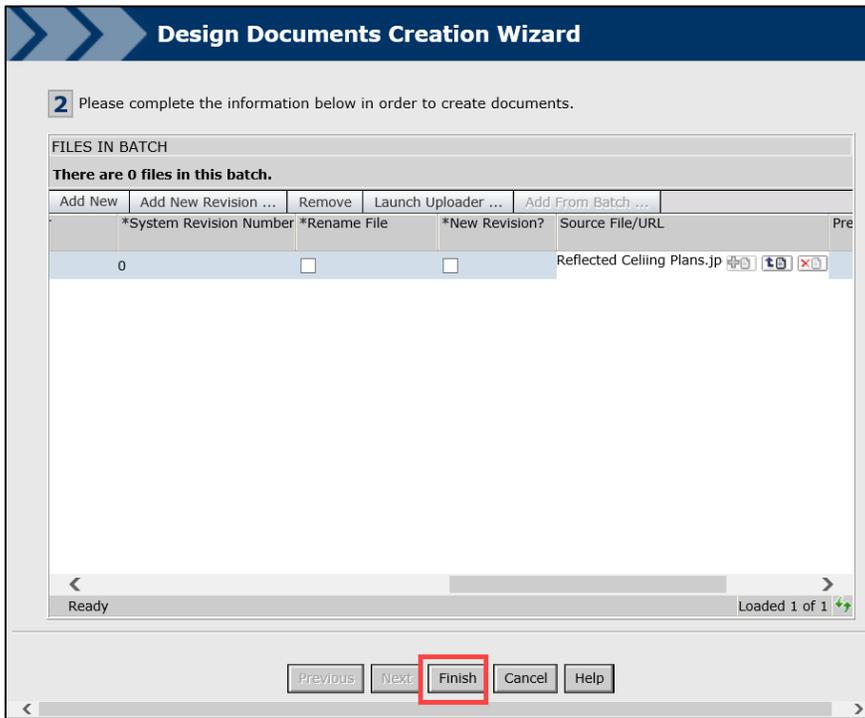
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9. In the 'Source File/URL' section, click upload and browse to the related document (pdf file, etc).



10. Click the 'Finish' button.



11. Click Close to finish the wizard. Closing the wizard returns the user to the register view and displays the new records.



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REFERENCES

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the [ePM Portal](#).

- QRG 01 – Navigating ePM
- QRG 02 – Using the ePM Address Book