

# Drawing Request
# Rep User Guide

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# Introduction

## Overview

The Drawing Request application allows reps to request engineering drawings for products.

## Getting Help

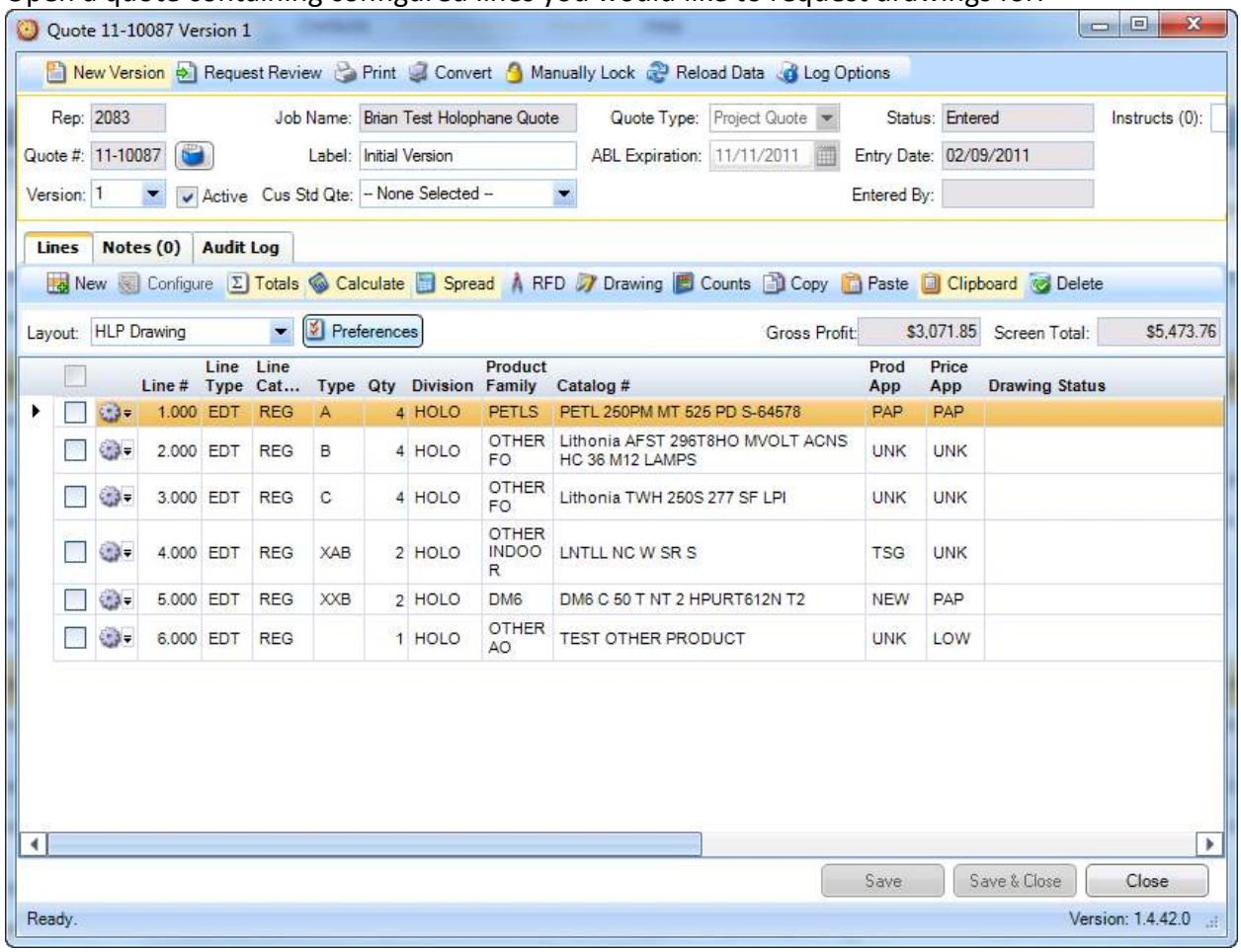
This User Guide will be your first source for 'How To' information. For additional questions and concerns please contact the Lithonia Support Center at 1-800-241-3638 or via email at SuptCenReps@Lithonia.com

## Creating and Submitting Requests

Requests must be created and submitted from an agile quote. For information on the Quotes application, please see the *Quotes User Guide*.

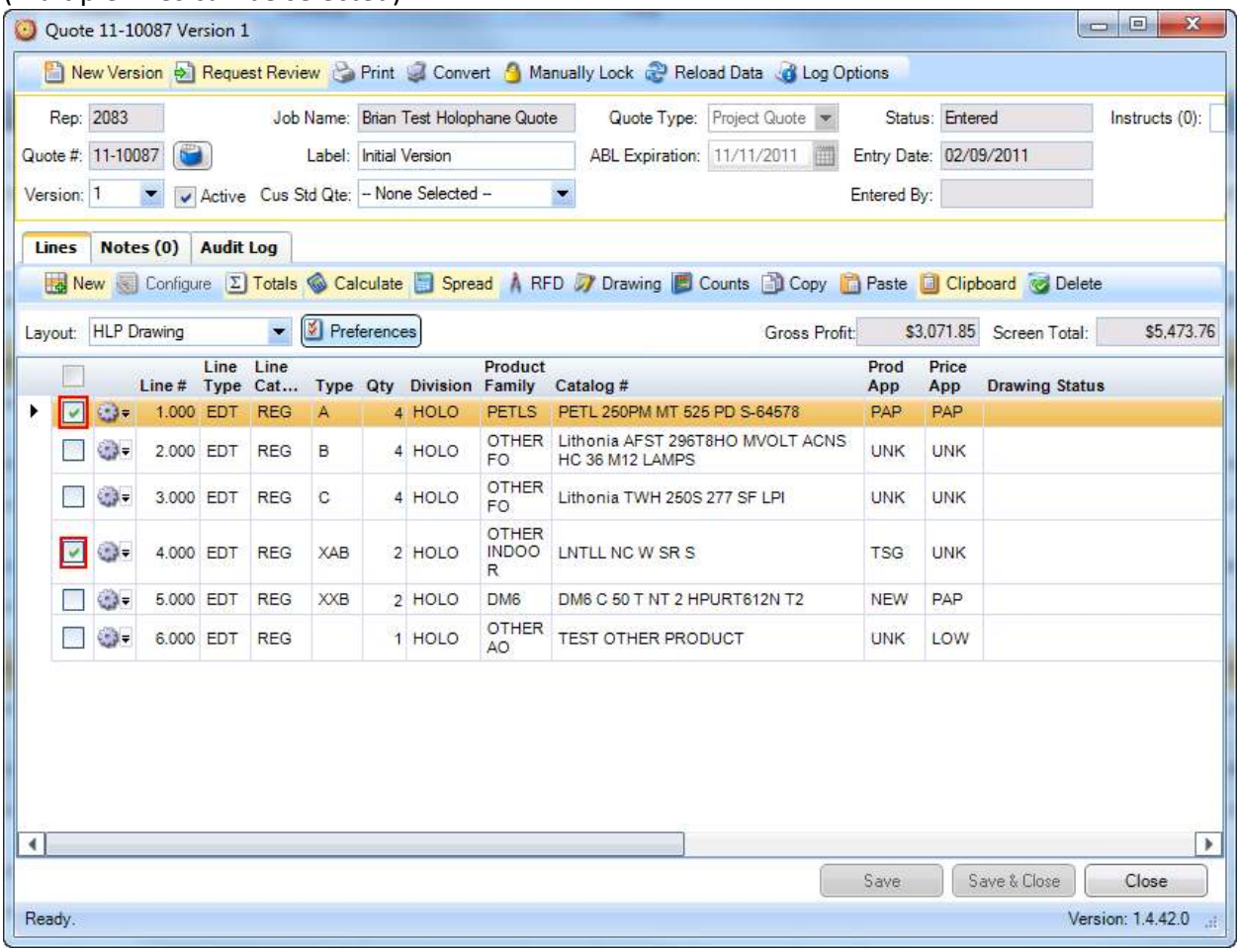
### Step 1

Open a quote containing configured lines you would like to request drawings for.



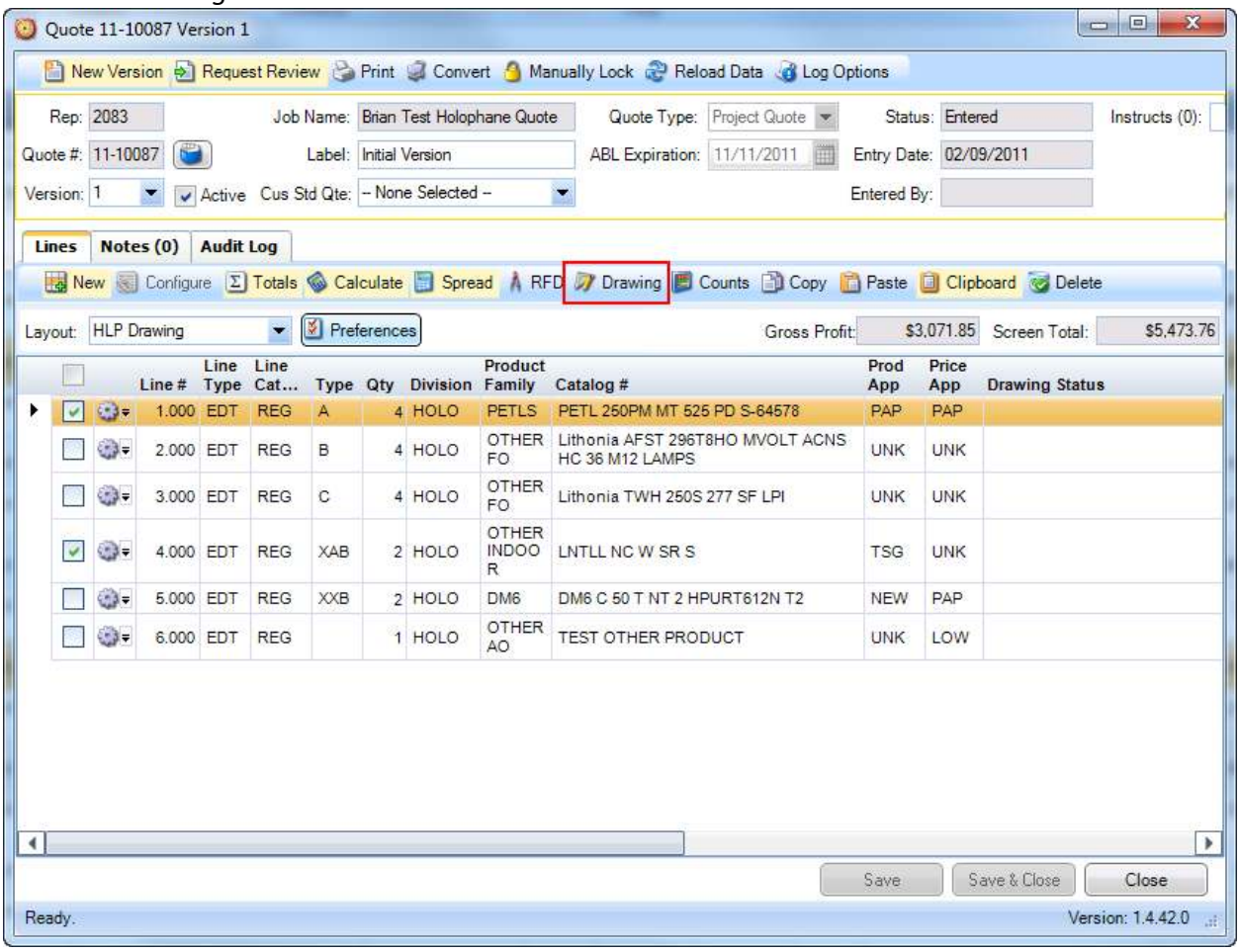
**Step 2**

Click the checkbox next to each line you would like to submit a drawing request for (multiple lines can be selected).



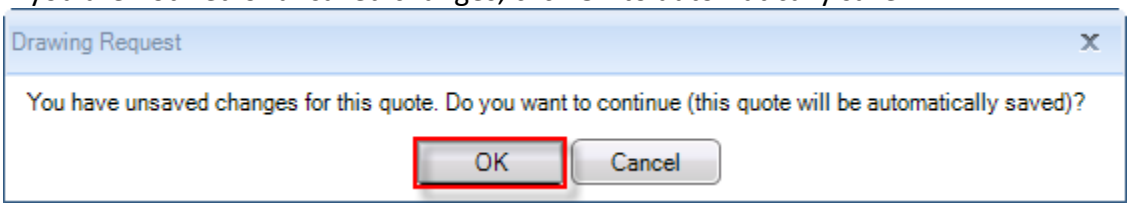
**Step 3**

Click the *Drawing* button from the toolbar above the lines.



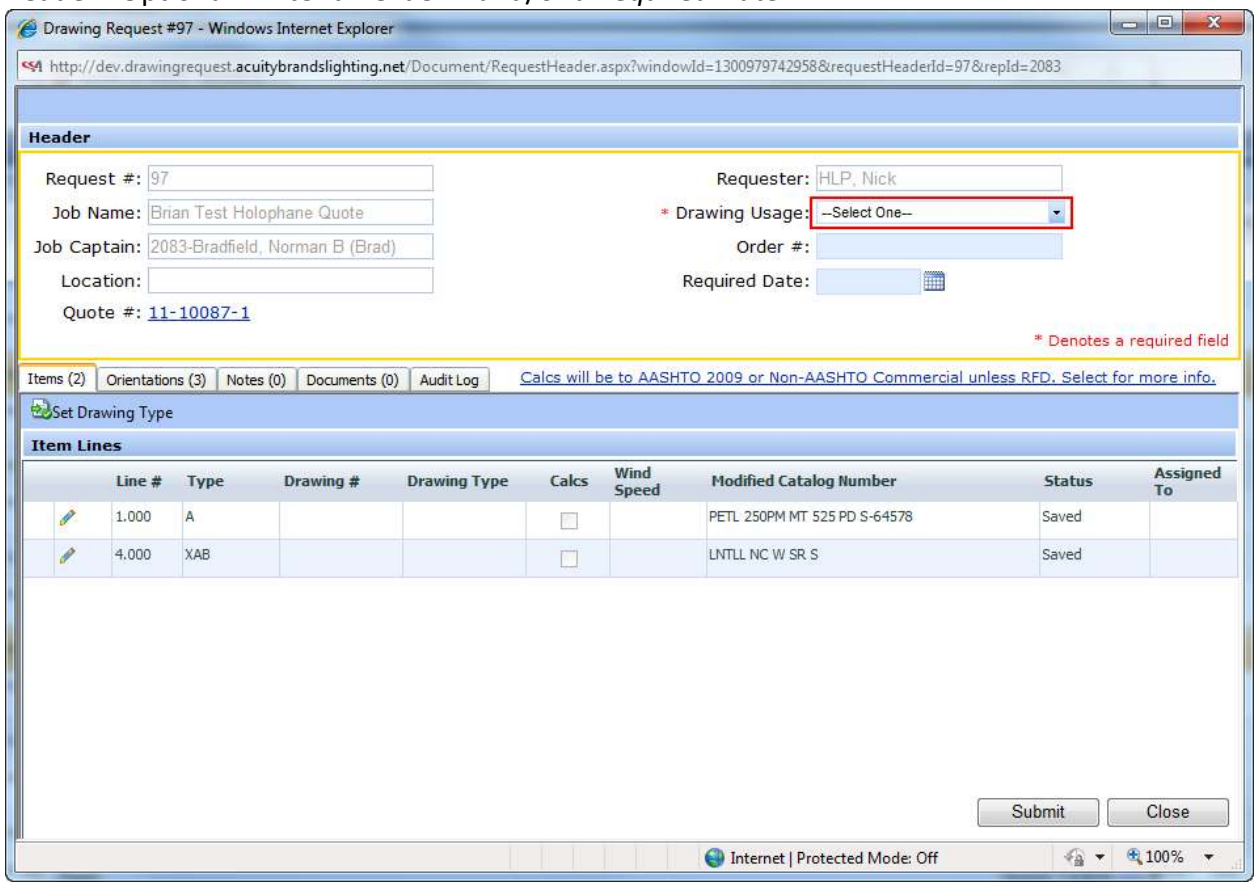

**Step 4**

If you are notified of unsaved changes, click OK to automatically save.



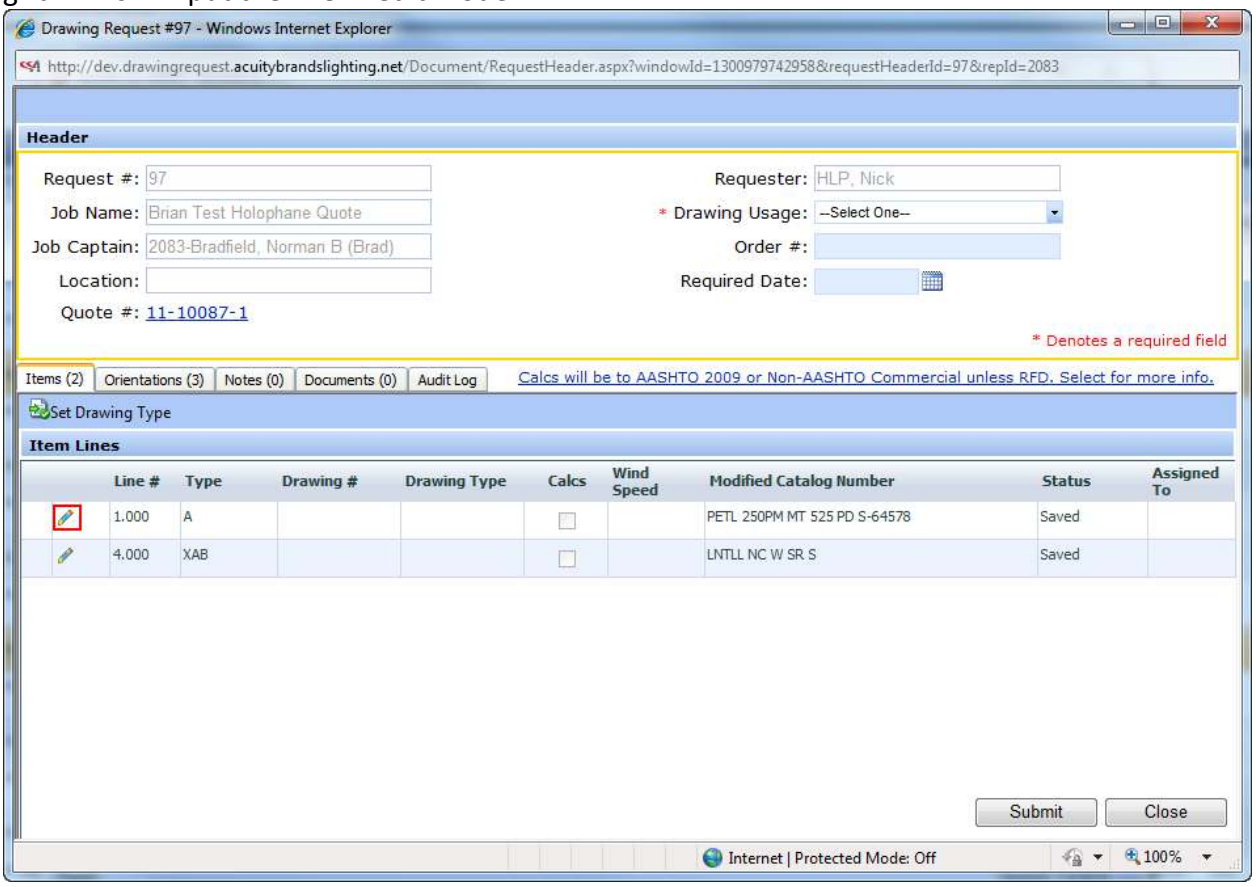
**Step 5**

Once the drawing request opens, choose a *Drawing Usage* from the pull down in the header. Optional: Enter an *Order #* and/or a *Required Date*.



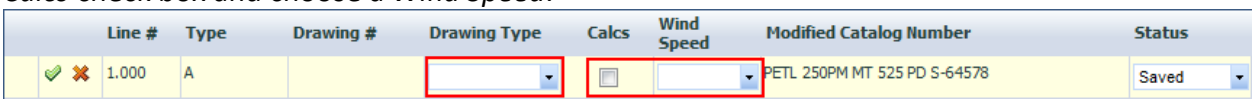
## Step 6

In the bottom half of the window, click the pencil icon next to the first line in the grid. This will put the line in edit mode.



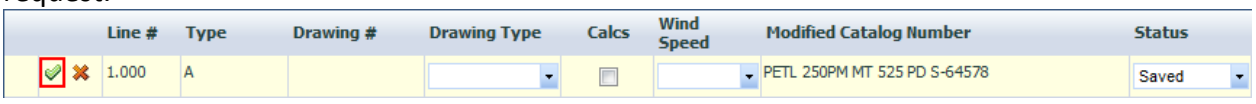

## Step 7

Choose a *Drawing Type* from the pull down menu. If calcs are required, click the *Calcs* check box and choose a *Wind Speed*.

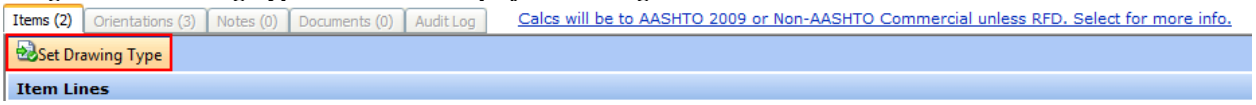



## Step 8

Click the green check mark. Repeat steps 7 and 8 for all lines on the drawing request.




***Note:*** ***If calcs are not required, you can quickly apply a drawing type to all lines on the request using the Set Drawing Type button at the top of the Items grid.***



If you need to specify orientation information, add notes, or add documents, continue to *Step 9.* If you are ready to submit the request, proceed to *Step 12.*

**Step 9 - Orientations**

Click the Orientations tab. All ship level lines will appear in the grid. From here you can perform the following actions:

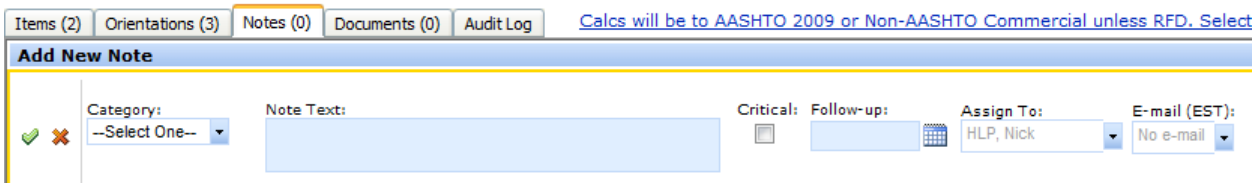
**Edit an existing ship level line:** Click the pencil icon next to a line and add the appropriate information. Click the green check mark when you are finished.

**Remove a ship level line:** Click the checkbox next to a line and click *Remove Selected Items*.

**Add a new line:** Enter the appropriate information at the top of the grid and click the green check mark.

**Step 10 – Notes**

a. Click the Notes tab.

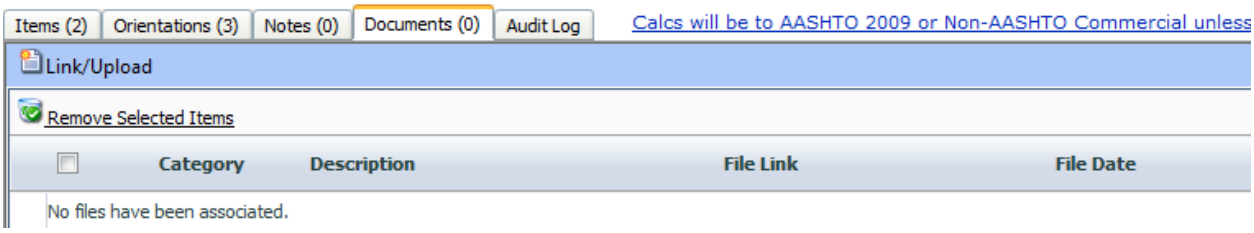



b. Choose a Category.
c. Enter the Note Text.
d. Optional – mark the note as critical. A critical note will display each time the drawing request is opened by another user.
e. Optional – choose a follow-up date. On this date a follow-up will be generated for the person listed in the Assign To box. This follow-up will be viewable through the Follow-up application. For more information on the Follow-up application, see the **Agile Portal Agency User Guide**. This user guide can be found in the help section of Agile.
f. Optional – choose a person to assign the follow-up to. If a follow-up date is chosen, the person who it is assigned to can be changed. The follow-up will be generated for the person listed in this box.
g. Optional – choose an e-mail notification time. If a follow-up date is chosen, the note can also be marked for e-mail notification. An e-mail will be sent to the person listed in the assign to box at the chosen time, on the follow-up date.
h. Click the ✔ to add the note to the grid.

Repeat the steps above to add additional notes. To edit an existing note, click the ✎ icon. This will put the note in edit mode in the grid. Once you have made changes click the ✔. To delete an existing note, click the ☐ icon and then click 'Remove Selected Items'.

## Step 11 – Documents

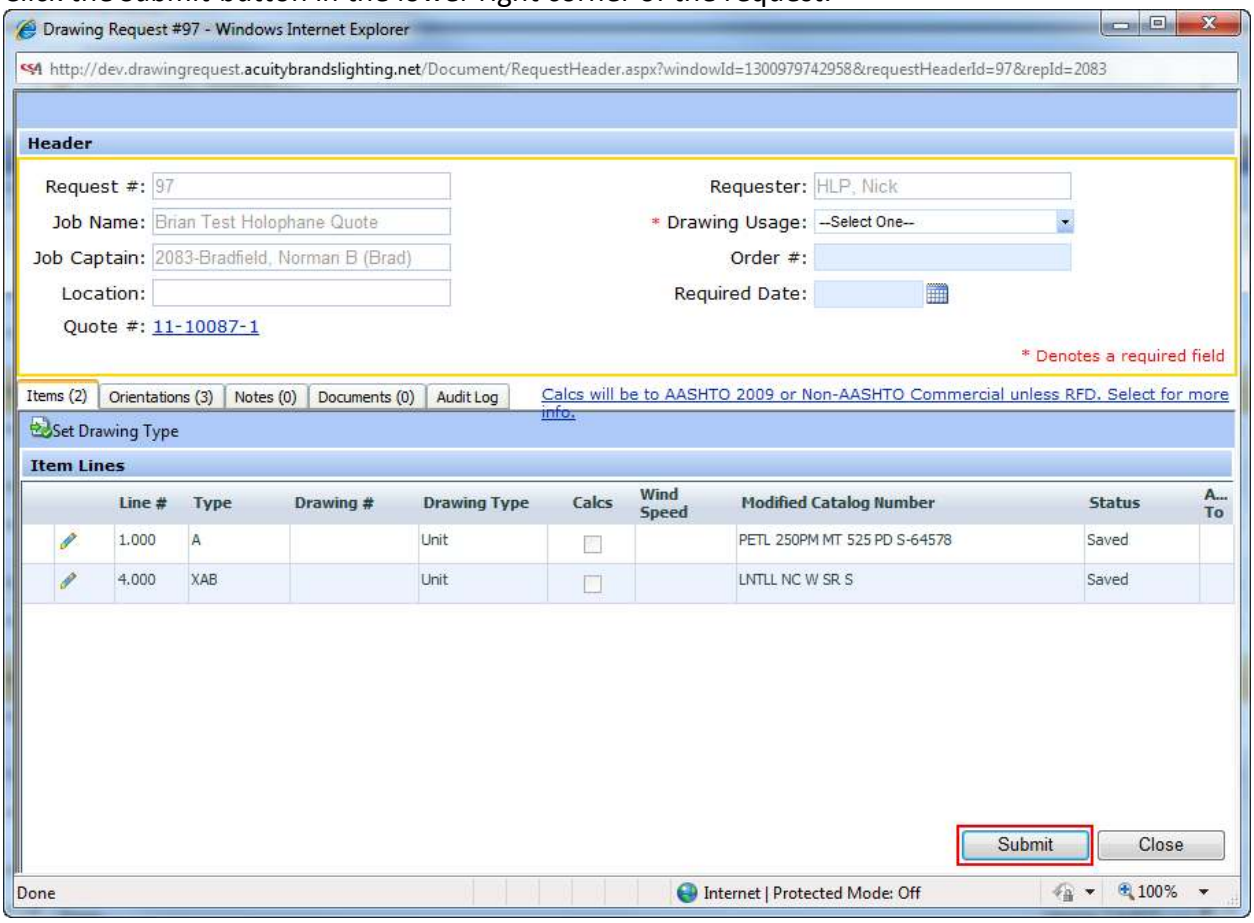
Click the Documents tab.




For instructions on using the documents tab, please see the **Document Upload User Guide.** This user guide can be found in the help section of Agile.

## Step 12 – Submit the Drawing Request

Click the *Submit* button in the lower right corner of the request.

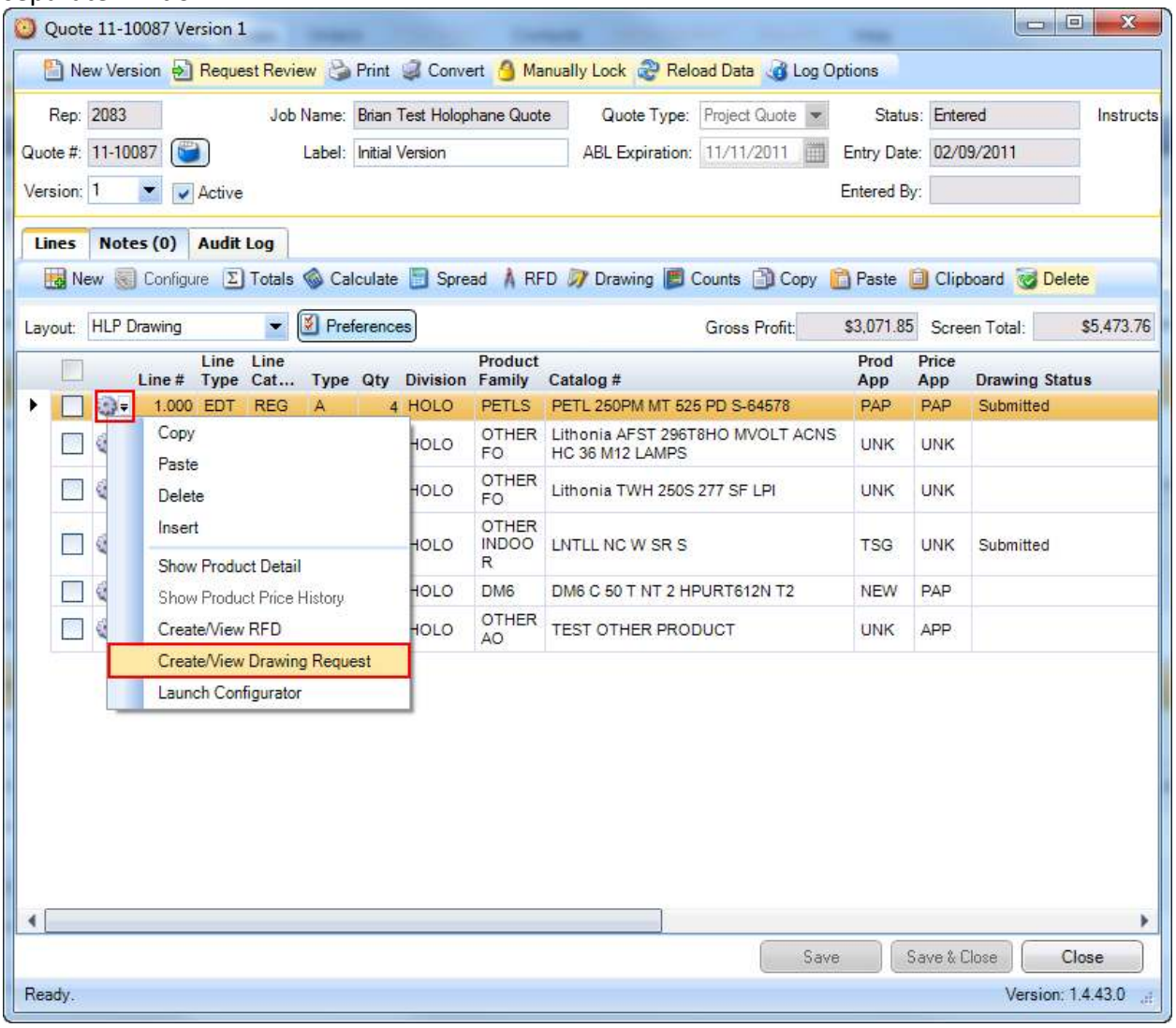


## Opening Existing and Completed Requests

Existing Drawing Requests can be viewed from the Project or the Quote they are associated with.

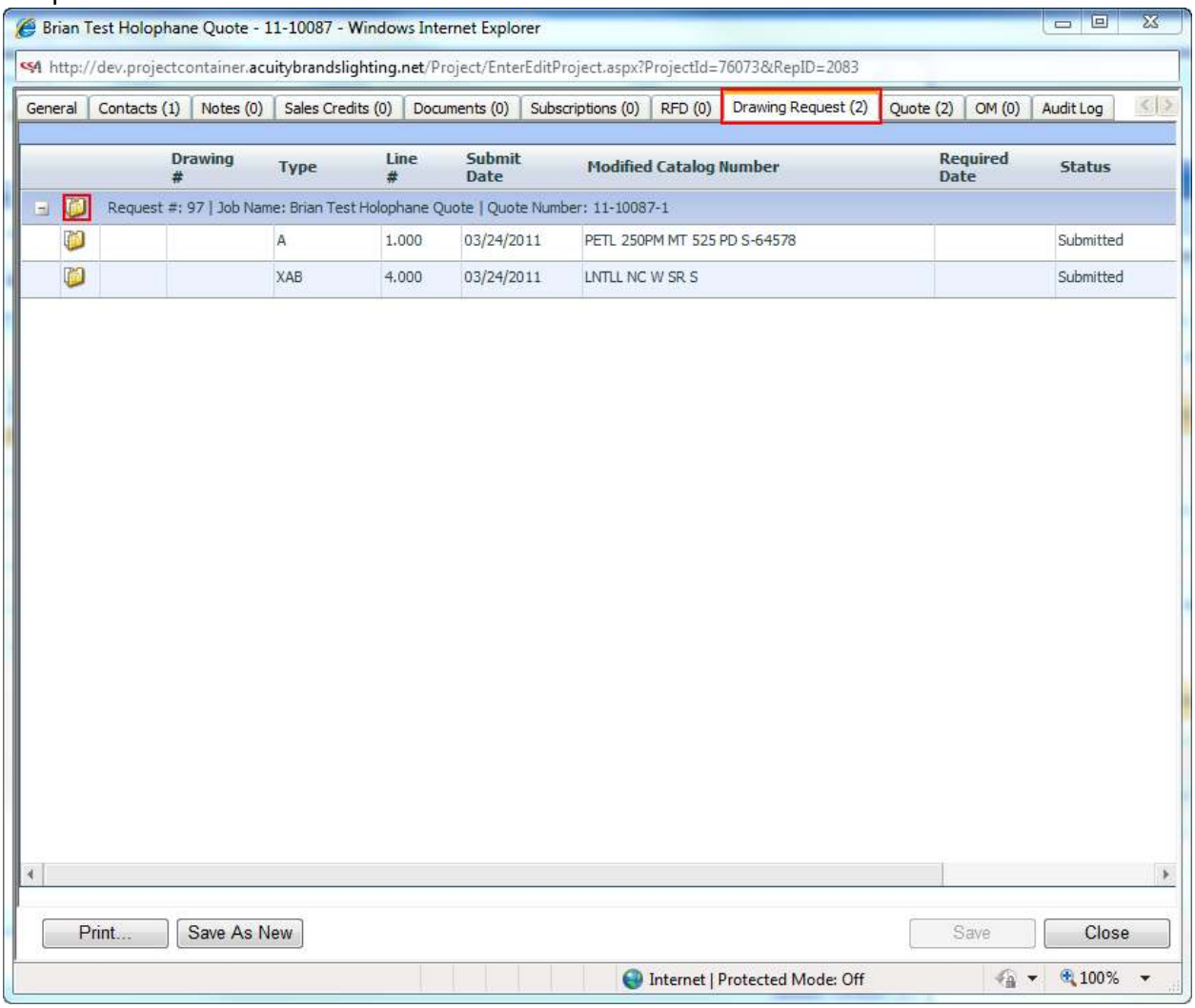
### From the Quote Line

Click the gear icon on one of the lines that was submitted on the Drawing Request and choose *Create/View Drawing Request*. The Drawing Request will open in a separate window.



## From the Project

Click the Drawing Request tab. Click the folder icon to open the Drawing Request in a separate window.



## Download Completed Drawing Files

Completed drawing files can be downloaded from the documents tab of the drawing request. For instructions on how to open existing or completed drawing requests, see the ***Opening Existing and Compeleted*** *Requests* section of this document.

Once the Drawing Request is open, click the *Documents* tab. All files that were uploaded to the request will be listed in the grid. Click the *File Link* to download a copy of a document to your computer.

