DEEP SPACE™

Document & Drawing Control SOP (v1.1)

From loose file to controlled record to issued transmittal

Deep Space web app · Standard Operating Procedure · Updated October 2026

Module	Documentation, Project Documents (Explorer, Document Register, Transmittals)
Primary personas	Document Controller, Contract Administrator, Project Manager, Site Manager
Version	1.1 (replaces 1.0 of 28 July 2026)
Last updated	28 October 2026
Next review	28 January 2027
Document ID	DS-SOP-Documents-DocumentAndDrawingControl

What changed in 1.1. The Document Register is now fully interactive: open any revision, compare revisions with a KAI change list, page through a set, and come back to exactly where you were. Upload revisions no longer needs a Set first and suggests matches from file names. Transmittals can be started straight from the register, documents can be registered from notices, emails and submittals, archive works in bulk, and the register can push to DS Site automatically. Fixed issues have been removed from Appendix A.

1. Objective

By the end of this procedure your project has a folder structure that suits how your business works, every drawing and specification is held as a controlled record with a document number, discipline and revision, and every issue of those documents to an external party is a dated, auditable event that records who opened it and who downloaded it.

Deep Space separates storage from control on purpose. Putting a file in a folder does not make it a controlled document. That single distinction is the thing most teams coming off a shared drive get wrong in their first fortnight, so it is dealt with first, in section 3.

2. Before you begin

- A project in the Deep Space web app, and a role with Documentation permissions on it. If menu items are missing, that is a permissions issue, not a bug. Ask your workspace admin to check your role.
- The files you intend to load. PDFs, images, Office files and whole folders are accepted, up to 200 MB per file.
- For transmittals, the recipient companies and contacts already in the project Directory.

- For notifications, a distribution list set up under Project Settings.
- Drawings with a legible title block, so KAI can extract their details. Name drawing files with the document number first.

Replaces today: a project folder tree on SharePoint or a network drive, a drawing register kept in Excel, drawings issued as email attachments, and a manual record of who was sent what. All four collapse into this one module.

3. What lives where

Layer	What it is	How to think about it
Explorer	Working storage: the folder tree under Documentation › Project Documents. Every file carries a version number (v1, v2, v3), a source, and a status of Registered or Unregistered.	Your project drive. Nothing here is a formal record until you register it.
Document Register	The controlled register. Each record carries Document Number, Title, Discipline, Revision, Status, Approval, Revision Date, Set, Document Type, Source and Received, and lists its transmittals and submittals.	The official list of documents for this project. One row per sheet or document, always showing the current revision, with every earlier revision kept.
Transmittals	Issue events, each with a number, a document list, recipients, and a per-recipient log of who viewed and downloaded.	A moment in time. These documents, at these revisions, went to these people on this date. It never changes afterwards.
Company Documents	A workspace-level store outside every project. Version controlled, with document types and expiry dates.	Your company library: templates, insurances, licences, policies.

3.1 Where does this document go?

Document type	Explorer	Document Register	Transmittal	Company Documents
Consultant drawing issue (IFT, IFC, revised sheets)	Via Upload revisions	Yes, one record per sheet	Yes	No
Specifications	Upload here first	Yes if contractually controlled	Yes, with the set	No
Reports (geotech, survey and others)	Upload here	Only if a contract document	Optional	No
Subcontractor shop drawings and submittals	Upload here	Yes, registered when the submittal is issued	Yes, back to the subcontractor	No

Drawings that arrive on an RFI reply or by email	Automatic	Register from the notice or email (section 9.2)	Optional	No
Executed head contract	Automatic on execution	Yes	No	No
Subcontracts and purchase orders	Automatic, under Commercial	Optional	No	No
Site diaries, inductions, SWMS, inspections	Automatic, under Forms	No	No	No
Company insurances, licences, templates, policies	No	No	No	Yes

Important. A file in an Explorer folder is not a controlled document, no matter how carefully the folder is named. Until it is registered it shows as Unregistered, has no document number, cannot be transmitted, and will not appear on the register your client or superintendent audits you against.

4. Folders: what the platform owns and what you own

4.1 Folders the platform creates and fills

Deep Space creates folders the first time one of its modules needs somewhere to file something, for example **Forms** (one folder per form type, filled as forms are submitted from DS Site and HSEQ), **Preconstruction**, **Drawings** (the DS Site destination) and **Commercial** (for example Commercial › POs). If any are missing, use **Folder Actions › Sync System Folders** in the Explorer. It creates whatever is absent and leaves everything else alone.

Treat these folders as reserved. They are not locked. If you rename or delete one, the next time a module files a document it recreates the folder and files into the new empty one, leaving your renamed folder orphaned.

4.2 Folders you create

Everything else is yours. A numbered structure sorts predictably, for example 01 Design, 02 Specifications, 03 Reports and Investigations, 04 Authorities and Consents, 05 Client and Superintendent, 06 Subcontractor Submittals, 07 Samples and Materials, 08 Handover and As Builts. If you are migrating from SharePoint or a network drive, compare your old structure against 4.1 first and drop anything that duplicates a platform folder.

5. Procedure 1: Create a folder

1. Open **Documentation › Project Documents**. The Explorer tab opens.
2. Confirm the project in the project selector at the top.

3. In the Folders panel, select the parent folder (if nesting) and click **+ Add Folder**. Type the name and click **Create**.
4. To rename, move or delete, open the three dots on the folder row, choose **Details** and use the Actions section.
5. To apply a saved structure, use **Folder Actions › Install Template**. The preview shows exactly what will be created. Installing only adds folders. It never deletes or overwrites.

> **Never delete to tidy up.** If a document should no longer be current, supersede it with a new revision (section 10) or archive it from the register (section 10.4).

6. Procedure 2: Upload documents

1. Go into the folder you want the files in. Uploads go to the folder you are viewing.
2. Click **Upload**, drag files (or a whole folder) onto the drop area, check the list and click **Upload**.

200 MB per file. Word and Excel files and saved emails (.eml, .msg) open in the browser. For drawings, use Upload revisions on the Document Register instead (section 10.1), so they are registered as they arrive.

7. Procedure 3: Split a bound drawing set

Consultants issue bound sets, and the register needs one record per sheet. In **Upload revisions**, use **Split** on the file card to break a bound PDF into one card per sheet. KAI reads each title block for the number, title, discipline and revision. Check the first few sheets before trusting a large set. Issuer-protected PDFs cannot be split, so ask for an unprotected copy.

8. Procedure 4: Share quickly, without a transmittal

All three options are on the folder row's three dots, then **Details**.

- **Public share link (no login).** Switch on **Share Public** and copy the link. Anyone with it can view and download that folder and everything beneath it, read-only. Switch it off to revoke. Check what is nested underneath before you switch it on.
- **Share with a subcontractor through the portal.** Under **Shared with**, pick the company from the Directory and click **Share Folder**.
- **Distribution list notifications.** Switch on **Distribution List Notifications** and pick a list. Everyone on it gets one batched digest when files change in that folder.

9. Procedure 5: Register documents

9.1 Register a file already in the Explorer

1. Tick the file in the Explorer and click **Promote**.
2. For a drawing, click **Extract metadata**. KAI reads the title block.

3. Check KAI's values against the full-size title block in the side pane, correct anything wrong, tick **Approve this file** and click **Approve**.

Check the "files selected" count before you click Promote, and clear it if it is not what you expect.

9.2 Register a document where it arrives

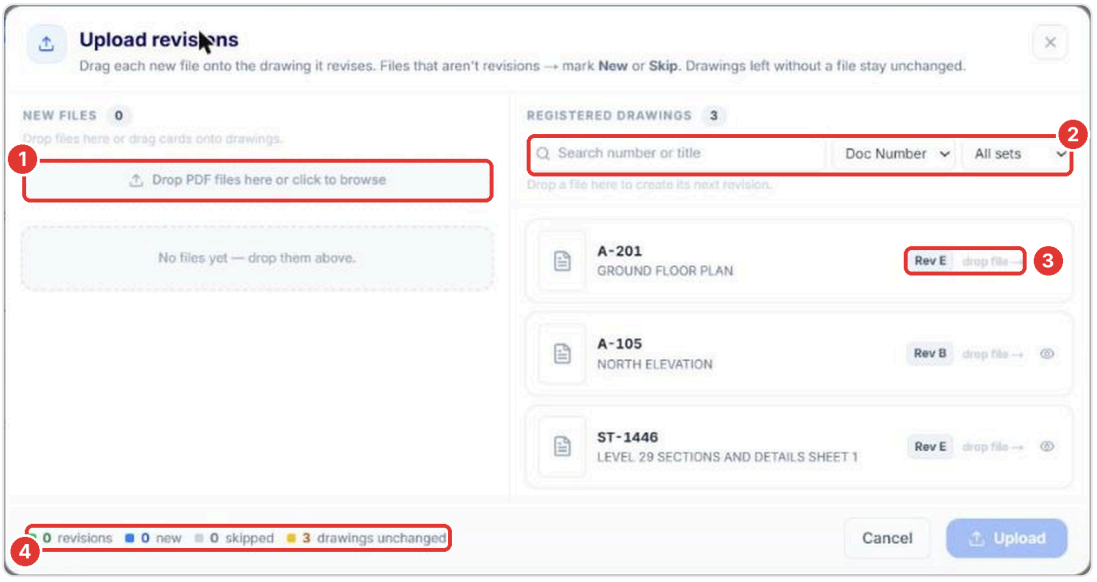
- **Notice reply or attachment** (RFI, SI and others): use the *Add to Explorer or the Document Register* icon on the attachment. The source is recorded as that notice.
- **Project Inbox email:** use the same icon. **Register as new** registers the file in place.
- **Submittal:** PDFs in "Files not in the register" are registered when the submittal is issued.

Five details are required for a new registered document: Doc Number, Title, Discipline, Revision and Status. Fill in Document Type and Rev Date too, because filters, exports and later revisions use them.

10. Procedure 6: Revise a document

10.1 A new issue revises a set you already hold

1. On the **Document Register** tab, click **Upload revisions** and drop the whole batch in. No Set needs to be chosen first. The Set dropdown only filters the list.
2. Files whose names start with a registered document number are matched and marked as suggested. Accept or unlink each one.
3. Drag any other file onto the drawing it revises. Mark files that are not revisions as **New** (registered as a new document) or **Skip**.
4. Check the tally (revisions, new, skipped, unchanged) and click **Upload**.



Upload revisions: incoming files on the left, registered drawings and their current revision on the right, and the tally along the bottom.

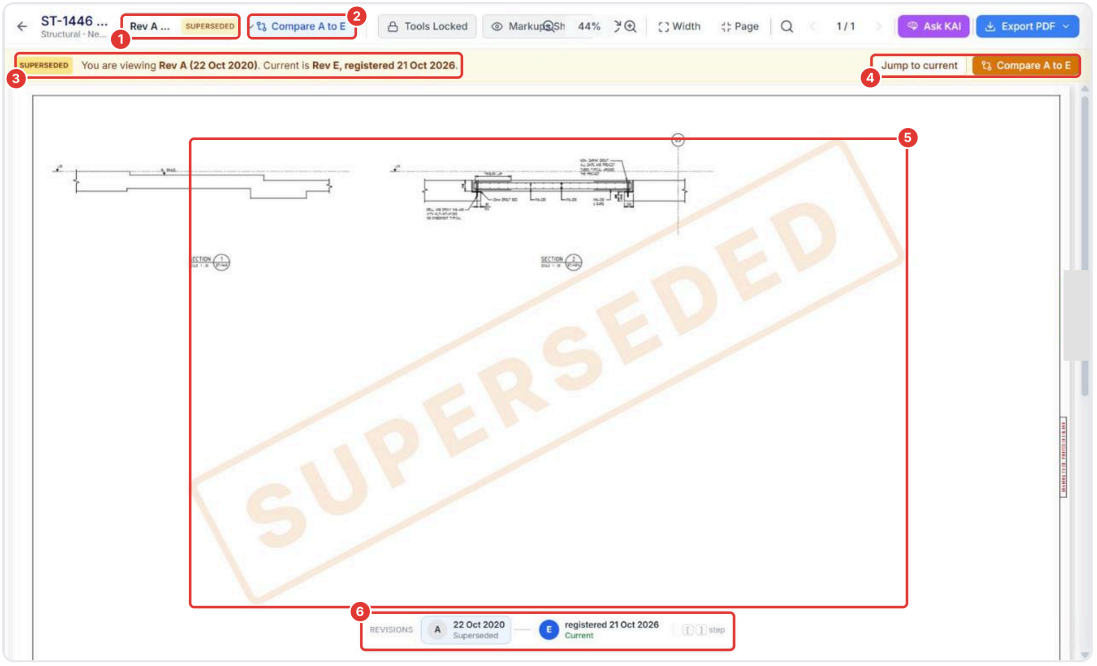
The Document Type carries over to the new revision. You are warned if the revision on the file does not match what you are registering it as.

10.2 Revise one document

Open the document's row and use **Upload Revision**. It opens prefilled with the next revision and the existing details.

10.3 Reading revision history and comparing

- The revision pill on each row ("Rev E of 2") lists every revision with its date and status, marked **Current** or **Superseded**, with **View** and **vs current**.
- Opening a superseded revision shows a banner naming the current revision, a SUPERSEDED watermark on screen (not on downloads or prints) and a revision timeline.
- Compare opens straight to previous against current, in **Overlay**, **Side by side** (with linked zoom) or **Swipe** mode, with KAI's numbered list of what changed.



Viewing a superseded revision: the banner, watermark and revision timeline make it clear this is not the current drawing.

> **Important.** Issuing a new revision does not change any earlier transmittal. A transmittal is a permanent record of what was sent on a given day. To tell people about the new revision, issue a fresh transmittal or rely on the register's digest list.

10.4 Taking documents off the register

Tick the rows and open **More**. **De-register** removes a document from the register but keeps the file in Explorer. **Archive** removes it from both. Neither deletes the file permanently.

The words matter: in the Explorer, working files have **versions**. On the register, controlled documents have **revisions**.

11. Procedure 7: Issue a transmittal

1. On the **Document Register**, tick the documents and click **Create Transmittal**. They are added at their current revision. (You can also start from the **Transmittals** tab with **New Transmittal**.)

2. Select the recipients. Send it to yourself first if you want to see exactly what they will receive.
3. Issue the transmittal. It is given its number when issued, and its status moves from Draft to Issued.

The recipient opens the transmittal and downloads one document or all of them. You open the issued transmittal and read the activity log, which records who opened and who downloaded. The register's Transmittals column shows every transmittal each document has gone out on.

12. Procedure 8: Get drawings to site (DS Site)

- **By hand:** tick documents on the register and use **More › Push to DS Site**.
- **Automatically:** in Project Settings (Advanced), turn on *Automatically push Document Register documents to DS Site*. Registrations and new revisions then go to DS Site as they happen. Push anything registered before you turned it on once by hand.
- On DS Site each drawing shows by number, revision and title, in drawing-number order, and a new revision replaces the old one so site only sees the current revision.

13. What happens next

- The register becomes the single answer to "what is the current revision", for everyone, including the client and the superintendent.
- Site crews see the current drawings in DS Site on their phones.
- Registered documents can be pulled into tender sets, notices, subcontracts and correspondence without being uploaded again.
- Every issue is auditable after the fact, by document, by recipient and by date.

14. Quick reference

If you want to	Go to
Add a folder	Explorer, Folders panel, + Add Folder
Apply a saved folder structure	Explorer, Folder Actions, Install Template
Recreate missing platform folders	Explorer, Folder Actions, Sync System Folders
Share with no login	Folder three dots, Details, Share Public
Give a subcontractor portal access to a folder	Folder three dots, Details, Shared with
Register a file already in the Explorer	Explorer, tick the file, Promote, Extract metadata, Approve
Register a drawing from an RFI reply or email	The attachment's Add to Explorer or the Document Register icon
Upload a new set of revisions	Document Register, Upload revisions
See what changed between revisions	Revision pill, vs current (or Compare in the viewer)
Print or share the register	Document Register, Export PDF

Issue documents formally	Document Register, tick rows, Create Transmittal
Prove someone received a drawing	Transmittals tab, open the transmittal, read the activity log
Get drawings to site	Document Register, More, Push to DS Site (or auto-push in Project Settings)

Appendix A: Things to watch for

Behaviour	How to work around it
Upload revisions only suggests a match when the file name starts with the document number	Name files with the document number first, or drag the file onto the drawing
A document archived in the web app can stay listed in DS Site	Tell the site team, or contact support to clear it
Each revision keeps its original file name in the Explorer	Read revisions from the register, not the Explorer
DS Site shows punctuation in drawing numbers as spaces (A-CC-101 shows as A CC 101)	No action needed. The drawing is the same.
Drag and drop only works inside the upload window	Open the upload window first, then drag
Long file names can be shortened on upload	Check names after uploading anything with a long name
Records created by someone else may not show until you reload	Use the reload control

Appendix B: Coming soon

Scoped or in development, not available today. No dates. Do not build a process that depends on these.

- Compare: numbered change markers on the drawing, marking changes as reviewed, and exporting a compare PDF
- Reviewing a whole revision issue as a set
- Smart Folders, saved queries shown as read-only folders
- Gated access, link expiry and per-recipient control on public share links
- Desktop drive sync, editing in Bluebeam, Word or Excel with versions round-tripping back

Document control

Version	Date	Change
1.0	28 July 2026	First release.

1.1	28 October 2026	Register viewer, revision history and Compare; Upload revisions without a Set step and with file-name matching; registering from notices, emails and submittals; transmittal from the register; bulk de-register and archive; Export PDF; DS Site push and auto-push. Fixed issues removed from Appendix A.