

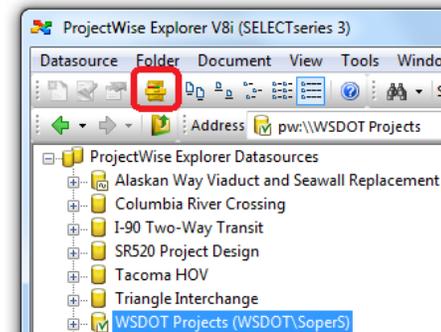
PROJECTWISE LOCAL DOCUMENT ORGANIZER TRAINING 201

ABOUT THIS TRAINING

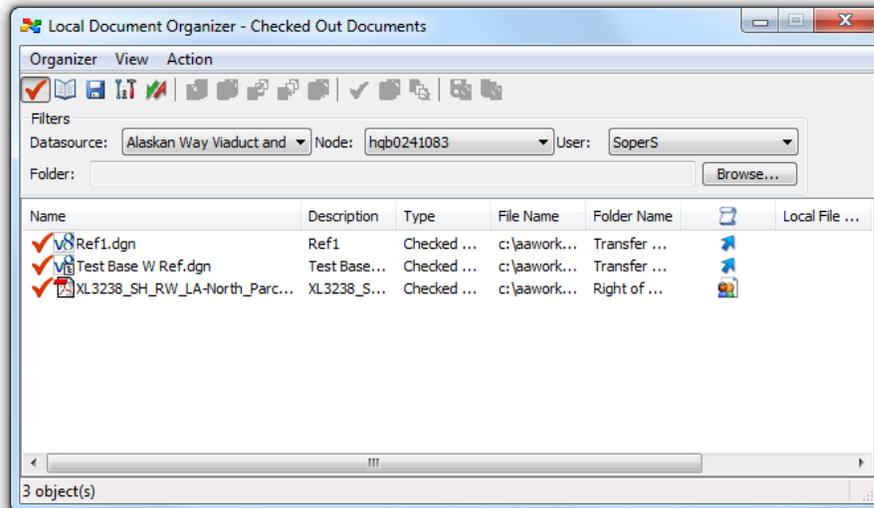
This training is intended to give a user the ability to open the ProjectWise Local Document Organizer and manage local files. The student should first have a basic knowledge of ProjectWise through the **ProjectWise V8i Training 101** course. Once you become comfortable working within the ProjectWise environment, you are encouraged to explore 200 level courses to discover more ProjectWise features.

Local Document Organizer

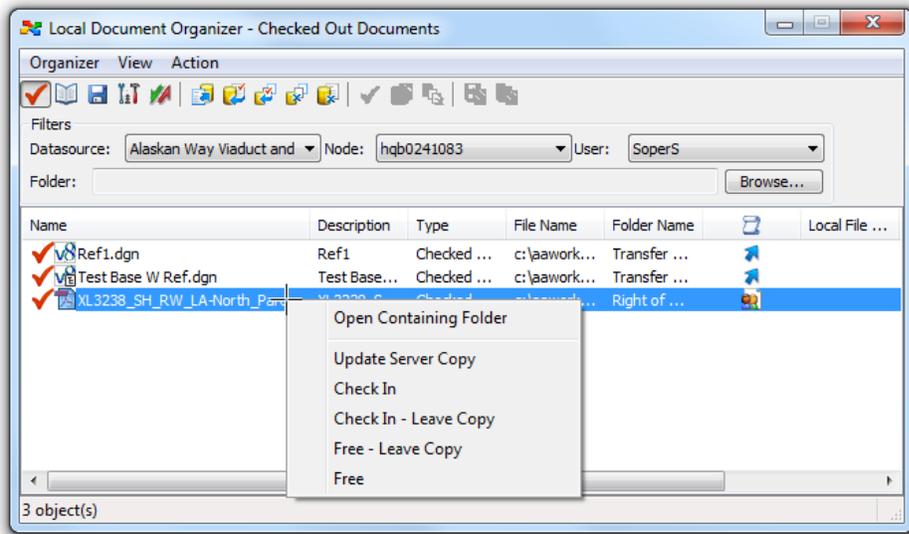
The **Local Document Organizer** allows you to easily see the status of files you are or have accessed in ProjectWise. To open the organizer, click on the Organizer icon (file cabinet) in the tool bar:



The Local Document Organizer opens and by default it shows you which files you have **Checked Out**. Notice that the upper left red check mark icon is selected.



Right click any file (or files) in the window and the command list appropriate for the file status appears.



Open Containing Folder

Select this command to jump to the folder where the file resides in ProjectWise.

Update Server Copy

This sends updated file information to the ProjectWise server and leaves the files checked out.

Check In

This command checks the file back into the server and it also purges the local copy from your PC. It is important to understand that this command is different than the **Check In** command when you exit a file. When you exit a file and check a file in through the Check In dialog box, the local copy of the file remains on your PC – this command removes the local copy. Typically you would use the next command to check in a file.

Check In – Leave Copy

This command will check the file back into ProjectWise and leave the local copy on your PC.

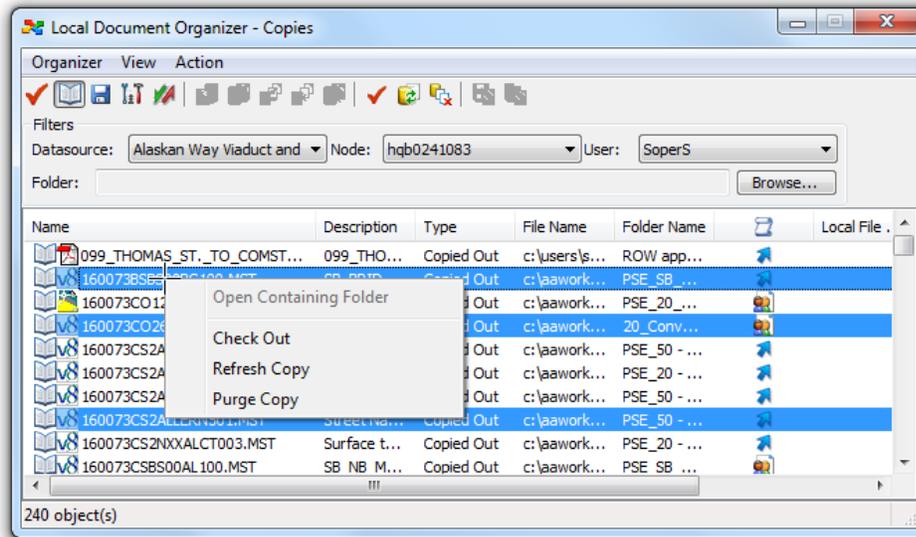
Free – Leave Copy

This will free the file meaning that the ProjectWise server copy is not updated but the file is available for check out. The local copy of the file remains.

Free

As per the previous command, the server copy is not updated, the file is made available, but the local copy of the file is purged.

The next icon (open book) shows which files are **Copied** locally to your PC.



Open Containing Folder

As before, this will jump to the folder that contains the file. In this case with multiple files selected that reside in multiple locations, the command is not available.

Check Out

These files have only been copied to your local working directory. Use this command to check out the files from ProjectWise. If another user has checked out a file since you copied them to your local working directory you will not be able to check the file out.

Refresh Copy

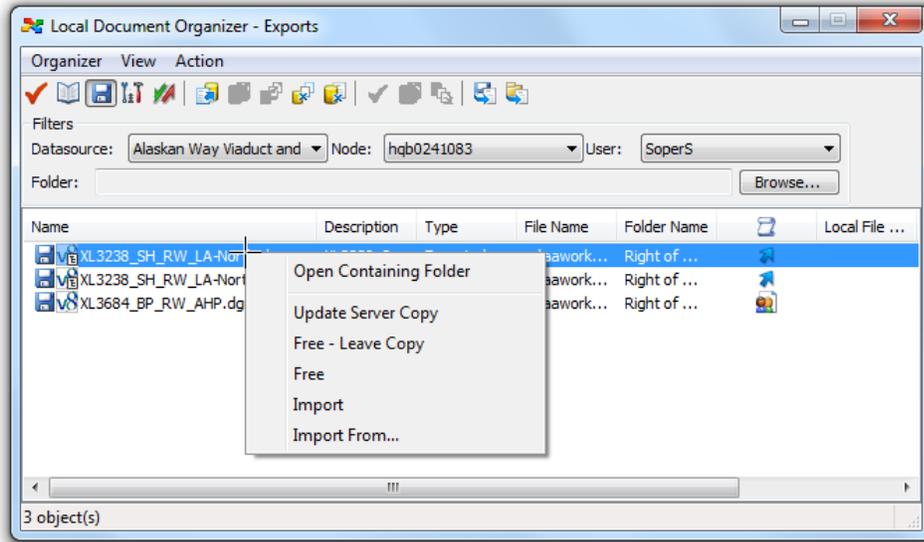
If you want to be sure your copy has the latest information, select this command to update it from the server. This is important with reference files that have been updated by other users.

Purge Copy

If you want to remove local copies from your PC, select them and use this command. This deletes the files and updates the database in ProjectWise.

Note: This is the only way a user should ever delete files from their local PC. DO NOT go into your local working directory and delete files, this will disrupt ProjectWise synchronization.

The third icon (blue disc) shows any **Exported** files you have out.



Open Containing Folder

See previous examples.

Update Server Copy

Updates the ProjectWise server copy and keeps the file exported.

Free – Leave Copy

See previous examples.

Free

See Previous examples.

Import

This command imports the file(s) back to the ProjectWise server and checks them in. To use this command the files must reside in the same folder on the PC that they were originally exported to.

Import From...

Use this command when the exported files are to be imported from a location that they were not exported to. A dialog window will open asking where the files are located.

If you have any problems or questions, please contact the **HQ CAE Helpdesk:**

HQCAEHlpdesk@wsdot.wa.gov

360-709-8013