

ProjectWise – Tips on Opening Documents

Overview

ProjectWise is a powerful document management tool that can handle multiple users in the same workspace and documents. How documents are opened controls the ability of other people to work in them.

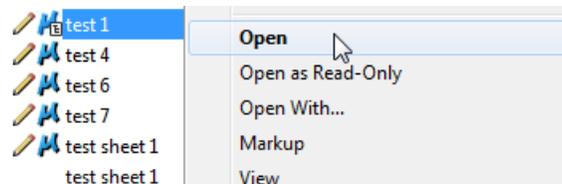
When a document is opened, it is checked out to the person who is opening it. When checked out, it is not accessible for others to work in. This can be a problem if the person opening the document only needs to review the contents while someone else needs to make changes in the document.

When opening documents, choose the appropriate option for the task...

Working in or Editing a Document

Generally speaking only one person can have a document checked out at a time.

- **Right Click** a document and choose **Open**. The document will be Checked Out and opened.

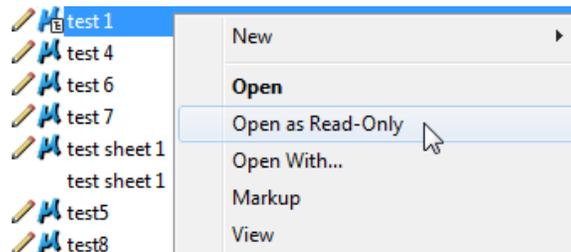


- **Double Click** a document. The document will be Checked Out and opened.

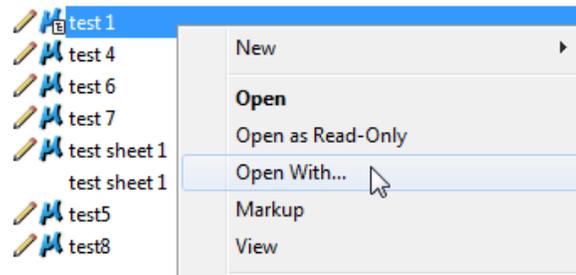
Review or Reading a Document

Here are some options to view a document without checking it out.

- **Right Click** on a document and choose **Open as Read-Only**. The document will be Copied Out and opened read only.

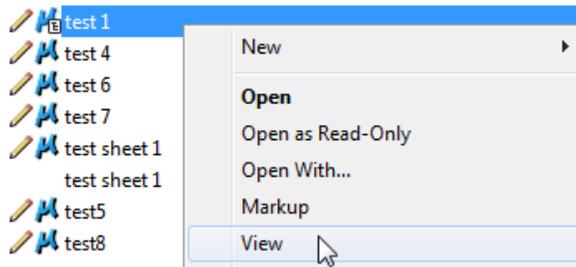


- **Right Click** on a document and choose **Open With...**



The Open document with dialog opens, Check on Open document as read-only and **OK**. The document will be Copied Out and opened read only.

- **Right Click** on a document and choose **View**. Document will be Copied Out and open in its associated application read only or in Bentley View.



- CAD files can be referenced into your working file.
- If you accidentally checkout and open a document that only needs read access to it, **Right Click** on file in ProjectWise and choose **Free**. This will free the document without closing the current session.



In either case, always remember to check documents back in when not actively working on them. A great way to know if documents are checked out to you is to use the *Tools > Local Document Organizer*.

For questions or comments on this tech note, contact your regional CAE Support Coordinator or the WSDOT CAE Help Desk at (360) 709-**8013**.