

ADVANCED PROJECTWISE FILE COMMANDS 201

ABOUT THIS TRAINING

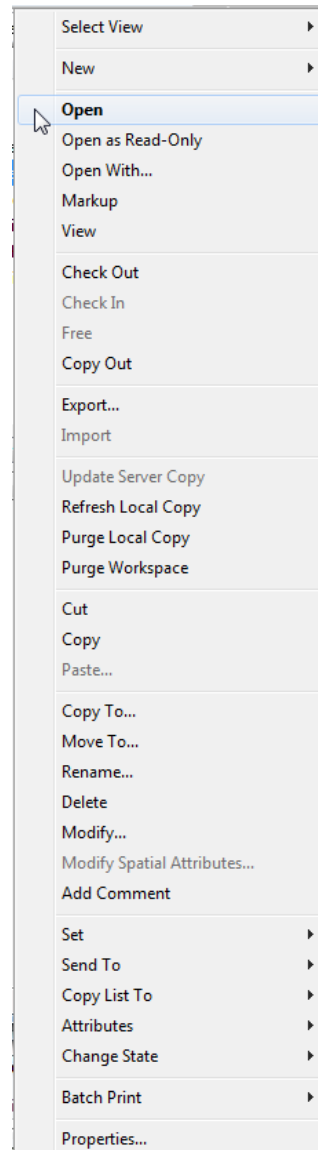
This training is intended to give a user the ability to use advanced file commands. The student should first have a basic knowledge of ProjectWise through the **ProjectWise V8i Training 101** course.

The File Command Window

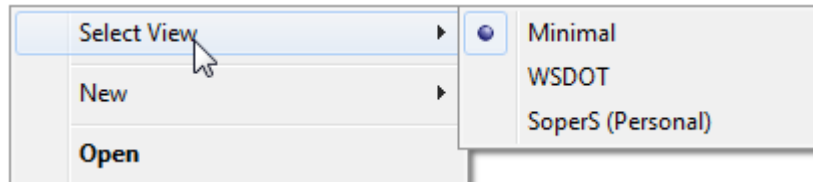
The command window opens when you right click a file (or folder) in the upper ProjectWise Explorer window.

The commands from **Open** to **Import** are covered in the **ProjectWise 101** training.

For this training we will cover the remaining commands that apply to ProjectWise at WSDOT

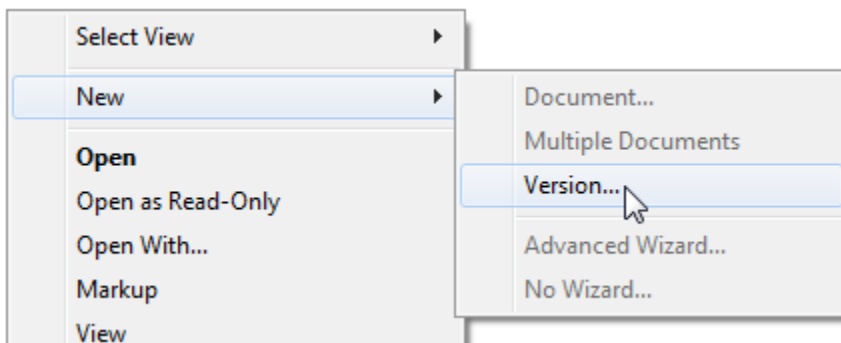


Select View



This is the same command the users sees when selecting the **View** pull-down menu from the ProjectWise tool bar. For more, see **Creating Folder Views 201**.

New



Document...

You can use this command to create a new document (not a file) in ProjectWise, but it's easier to create a file outside of ProjectWise and then drag it into a folder. If you want to track an item that is not on the server in ProjectWise (like a physical object), then use this to create a document.

Multiple Documents

See above.

Version...

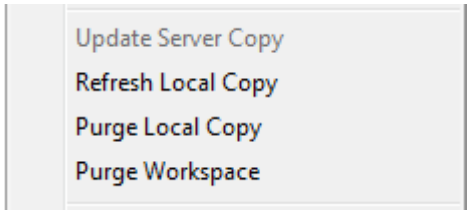
Use this command to create a version of the selected file. See **Using ProjectWise Versions 201** for more about versions and how they are used.

Advanced Wizard...

Uses the **Advanced Wizard** to create a document – see **Document...** above.

No Wizard...

This is the same command as **Document...** - creates a document without using the Advanced Wizard.



Update Server Copy

If a file is checked out, this command is available to bring revisions from the local working copy to the server while leaving the file checked out.

Refresh Local Copy

This command pushes any revisions to a file on the server down to the local working copy. It could be titled Update Local Copy.

Purge Local Copy

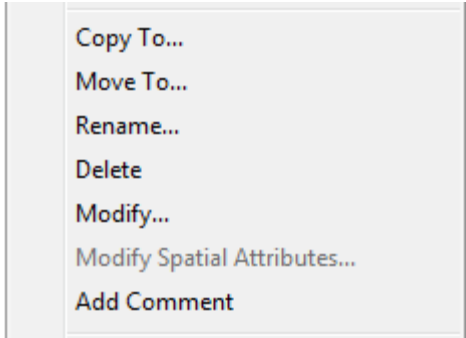
Use this command to remove the local working copy from your PC.

Purge Workspace

Not used at WSDOT

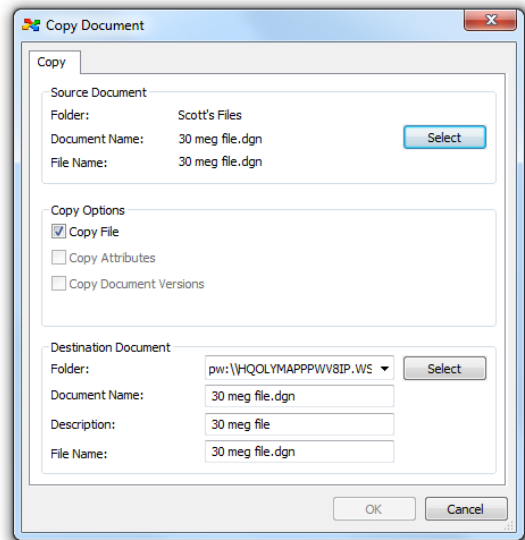


The **Cut**, **Copy** and **Paste** commands work the same as they do in any Windows environment. You can **Cut** (delete) a file from one location and **Paste** it to another location. Or you can **Copy** from one location and **Paste** to another.



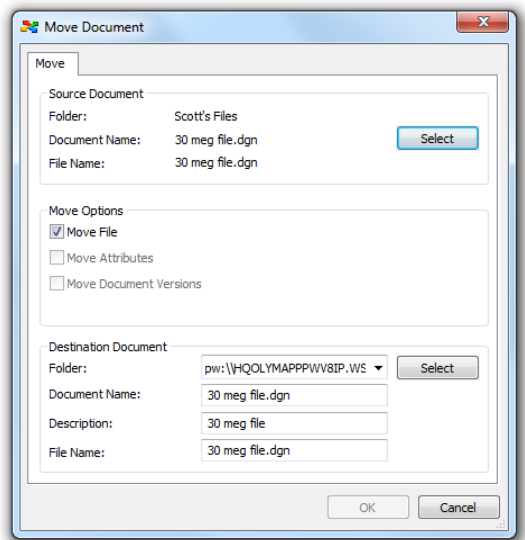
Copy To...

Same as Copy/Paste above but uses a dialog box. Use this to copy a file from one location to another.



Move To...

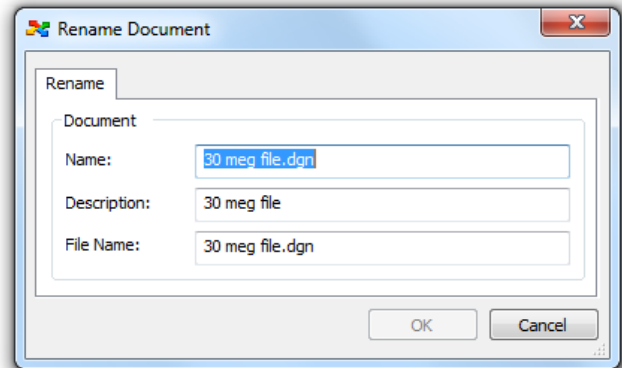
Same as Cut/Paste above but uses a dialog box. Use this to move a file from one location to another.



Rename...

This command allows you to change the

- **Name:**
- **Description:**
- **File Name:**



Name versus File Name

There seems to be a duplication of information here with **Name:** and **File Name:**. This is a common question in ProjectWise that requires an explanation.

ProjectWise is a file management system working from a database. When a file is brought into ProjectWise, a column is created in the database to track the file – this is the document. That means that every “object” in ProjectWise typically has both a document name and a file name. By default, when you bring a file into ProjectWise, it uses the name of the file to populate the document name and the description. Notice in this case all three sections are populated with **30 meg file**. Though it isn’t critical, you should strive to keep the name and the file name synchronized – the description can be anything. ProjectWise always uses the document name to track the file.

Whenever you see 2 similar categories in ProjectWise (such as Name and File Name) the one that does not have “file” prepended to it will always refer to the document in the database while the other refers to the file that’s attached to the document in the database. Another example would be the columns Updated and File Updated. Updated refers to the document while File Updated refers to the file itself.

Delete...

This command deletes the file if the user has been given delete privileges and proper access rights to the file. Note that in any case, if a file status has been set to **Final**, the file cannot be deleted unless an admin first removes that status.

Modify...

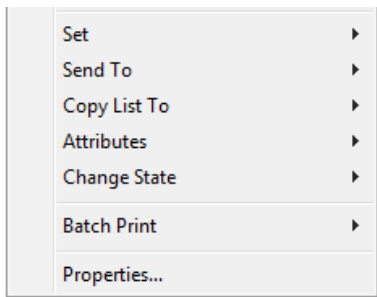
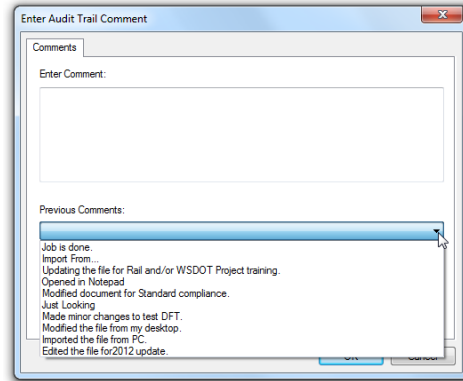
Due to the ability of this command to disrupt the file's attributes, it is recommended that you use the **Rename** command instead of this.

Modify Spatial Attributes...

Not used

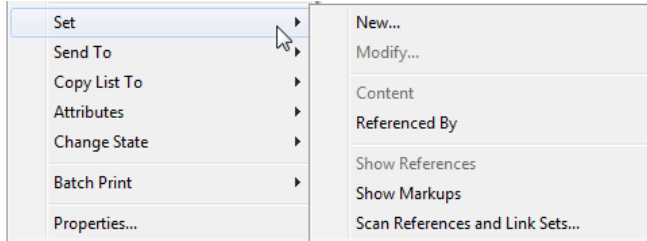
Add Comment

This command opens the **Enter Audit Trail Comment** window and allows the user to enter audit trail comments without opening the file. As always, clicking on the **Previous Comments:** down arrow shows any comments the user has made.



Set

Selecting **Set** brings up a subset of commands:

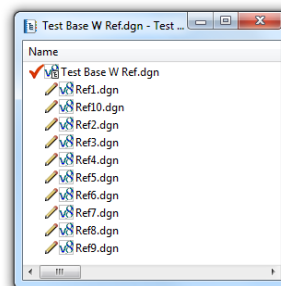


New... Modify... Content Referenced By

These commands refer to **flat sets**. A flat set is a group of documents that are placed into a container for some purpose, such as for printing, or to simplify the check-out of multiple documents across folders. For more information on creating and working with flat sets, see the **ProjectWise Sets 201** document.

Show References

This command will search a DGN or DWG file for any files referenced to it and display them in a new window.



Show Markups

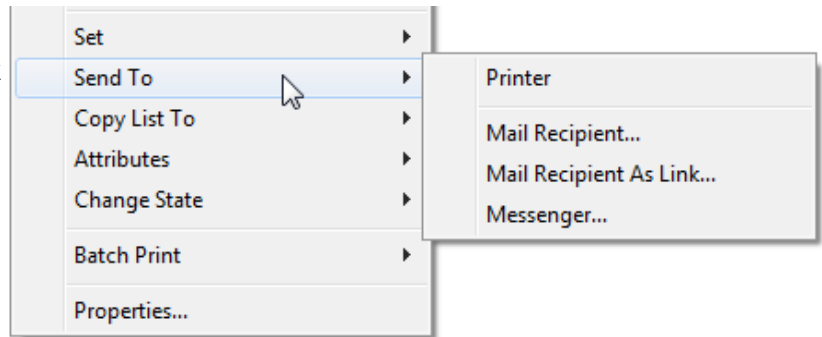
Not used.

Scan References and Link Sets...

Advanced command used by Administrators to Scan-Ref files.

Send To

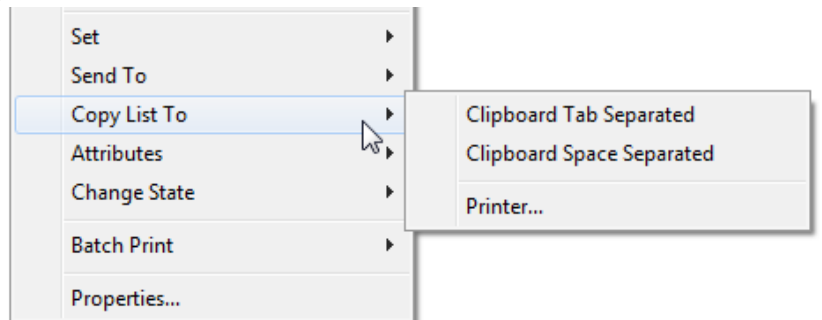
- **Printer** – sends the file directly to your default printer. Use mainly for Office documents.
- **Mail Recipient...** - opens Outlook and prepares an email to send the file.
- **Mail Recipient As Link...** - opens Outlook and prepares an email to send a link to the file.
- **Messenger...** - opens the ProjectWise Messenger to send a link to another ProjectWise user.



Copy List To

The **Copy List To** commands are used for sending document lists to the Windows clipboard, or to a printer. The document list is the contents of the document display pane in ProjectWise Explorer. If no documents are selected, Copy List To selects all of the documents at the root of the folder; if some documents are selected then the information for only the selected documents is taken. Once copied to the clipboard, you can then paste the list into the application of your choice. The purpose of these options is to have reporting of document information, which can easily create text reports about ProjectWise documents.

Note - this command will use the information from the current folder view. If you want to capture more or less file information, change the folder view. See **Creating Folder Views 201** for more information.

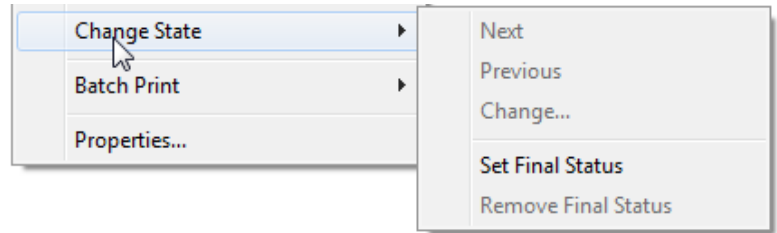


Attributes

Not used.

Change State

Some WSDOT offices and projects use States to control the workflow in ProjectWise. If the selected file has a workflow attached, the first three options will be enabled. Regardless of workflows, any file can have the **Final Status** set by users that have access to that command.



Batch Print

Not used through this command.

Properties...

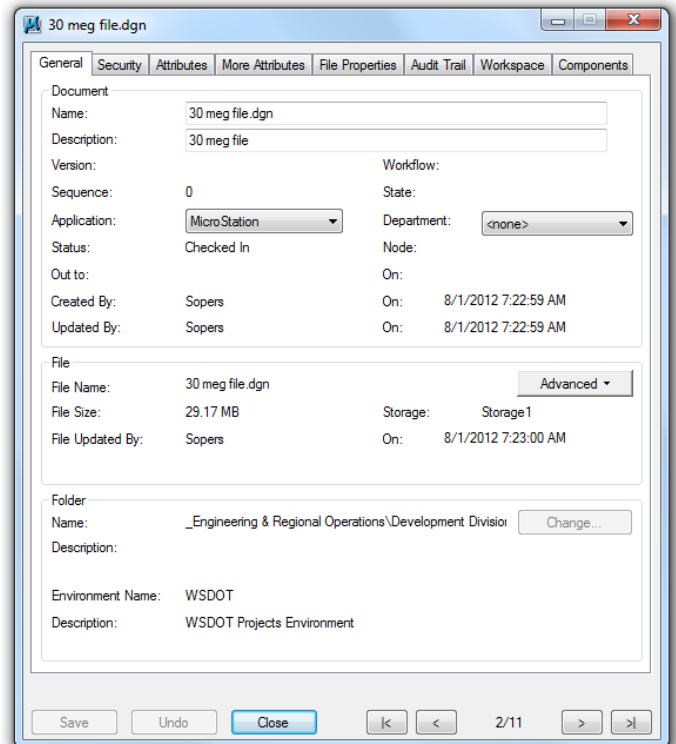
The Properties dialog box has 8 tabs to choose from.

General

The **General** tab is divided into 3 sections:

- **Document**
- **File**
- **Folder**

The **Document** section shows information pertinent to the document. There is yet another way to change the document name and description. Additionally you can change the **Application:** and the **Department:** of the document.



The **File** section shows information pertinent to the file. The **Advanced** pull-down shows commands that are applicable to the file, however, the only command that should be used is the one to **Rename** the file.

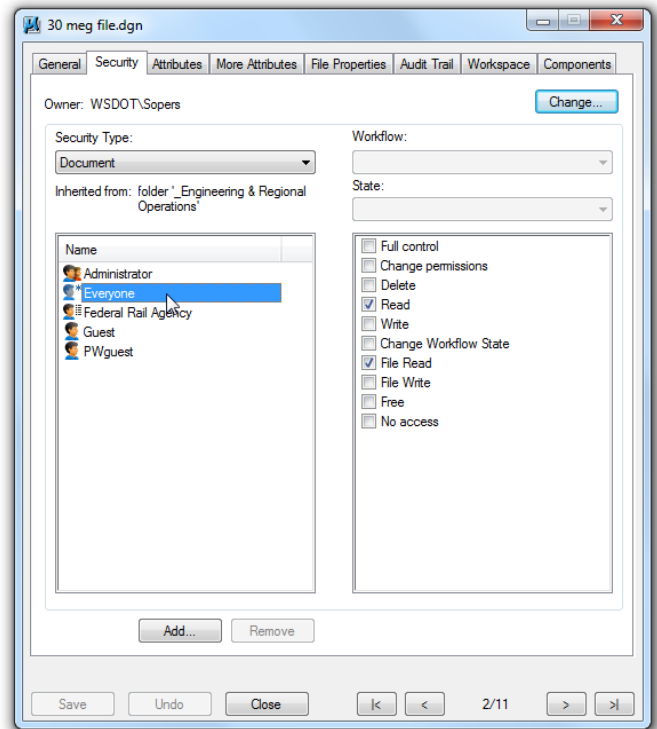
The **Folder** section shows information pertaining to the folder the file resides in.

In the lower right area of the dialog box you can scroll or jump to other files contained within the folder. In this example it shows that the 2nd file of 11 is being viewed. Clicking on the > arrow would then show the properties of the 3rd file in this folder. The scrolling commands are available on all the tabs in Properties dialog box.

Security

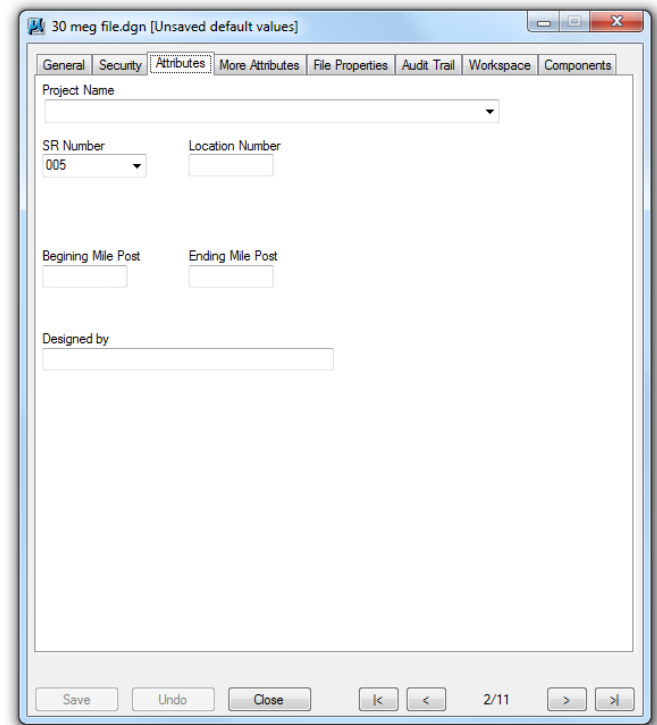
The **Security** tab shows the security of the selected file. Clicking on a group in the list will show its access. In this case, the group **Everyone** has read only access for the document (**Read**) and the file (**File Read**).

Only ProjectWise admins can add or remove groups and alter a groups access.



Attributes

The **Attributes** page shows any attributes that have been created for the particular file or folder. Not all projects and their files use an attribute page.

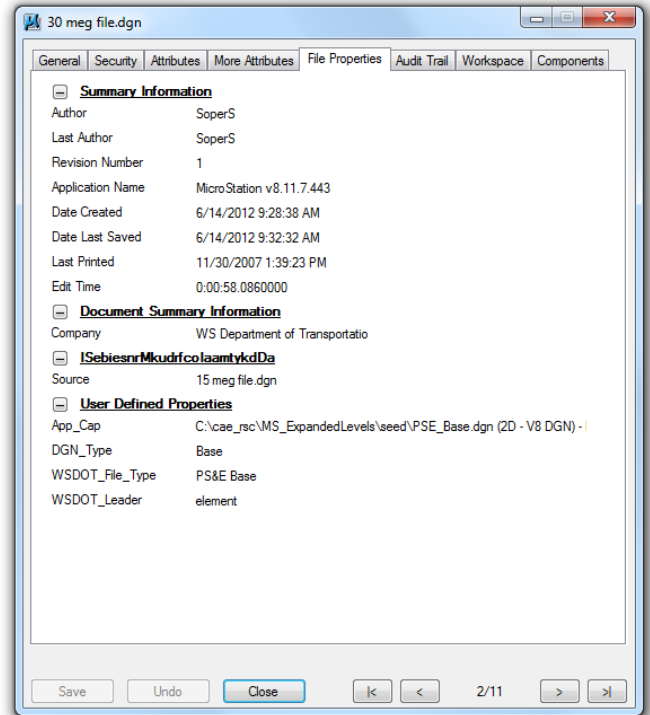


More Attributes

Sometimes an additional page for file attributes will be used. Otherwise it will be blank.

File Properties

The **File Properties** tab shows in-depth file (not document) information.



Audit Trail

The **Audit Trail** tab is covered in the **WSDOT ProjectWise V8i Training 101** document.

Workspace

Not used.

Components

Not used.

If you have any problems or questions, please contact the **HQ CAE Helpdesk**:
HQCAEHlpdesk@wsdot.wa.gov
360-709-8013