

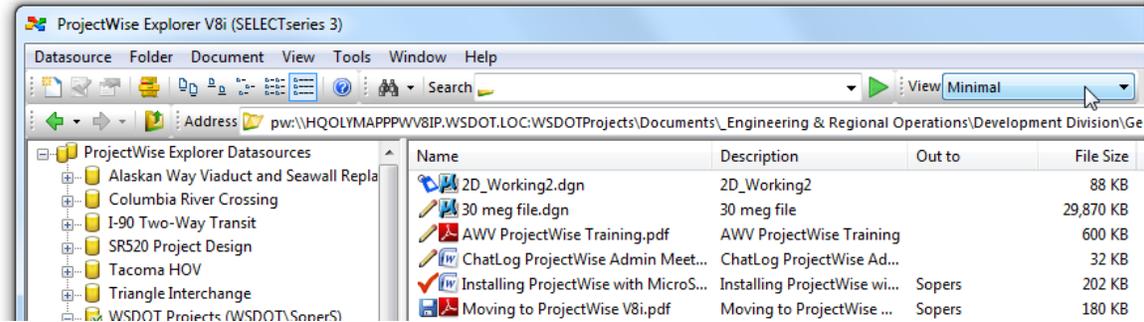
# CREATING CUSTOM VIEWS IN PROJECTWISE 201

## ABOUT THIS TRAINING

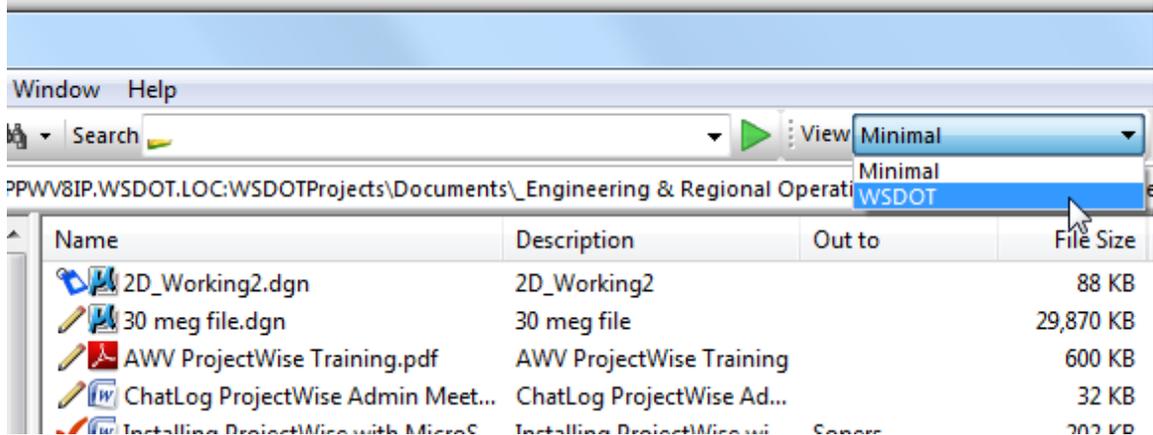
This training is intended to give a user the ability to create and manage custom views within ProjectWise. The student should first have a basic knowledge of ProjectWise through the **ProjectWise V8i Training 101** course.

## Custom Folder Views

Custom folder views allow you manage the information that shows in folders. By default, most users see the **Minimal** global **View**. This view shows columns titled **Name**, **Description**, **Out to** and **File Size**.



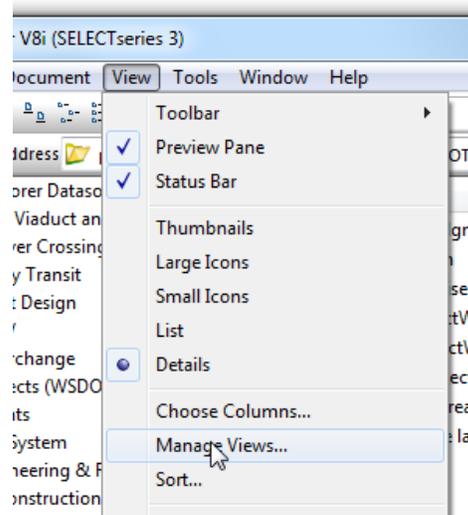
You can switch from the **Minimal** view to the **WSDOT** view through the pull down window.



Notice that the WSDOT view shows much many more information columns in the folder window. There are now **Name, Description, File Name, File Size, Folder Id, File Updated, Out to** and **Object Id**. Both Minimal and WSDOT are global views that all users can access. You can also create custom personal views to see the folder information that's pertinent to your files.

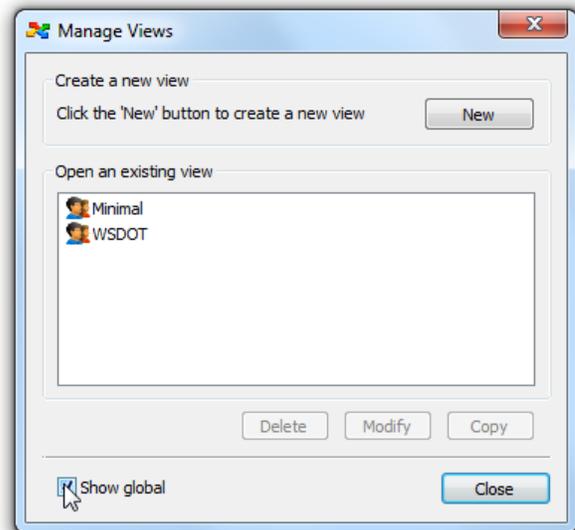
Name	Description	File Name	File Size	Folder Id	File Updated	Out to	Object Id
2D_Working2.dgn	2D_Working2	2D_Working2.dgn	88 KB	192	10/5/2011 10:51:40 AM		1
30 meg file.dgn	30 meg file	30 meg file.dgn	29,870 KB	192	8/1/2012 7:23:00 AM		10
AWV ProjectWise Tr...	AWV ProjectWise Training	AWV ProjectWise Traini...	600 KB	192	8/8/2012 11:46:35 AM		12
ChatLog ProjectWise...	ChatLog ProjectWise Ad...	ChatLog ProjectWise Ad...	32 KB	192	8/1/2012 9:28:51 AM		9
Installing ProjectWis...	Installing ProjectWise wi...	Installing ProjectWise wi...	202 KB	192	4/30/2012 1:36:08 PM	Sopers	6
Moving to ProjectWi...	Moving to ProjectWise ...	Moving to ProjectWise ...	180 KB	192	4/30/2012 1:36:01 PM	Sopers	5

To create a personal view, select **View > Manage Views...** from the pull-down menu.



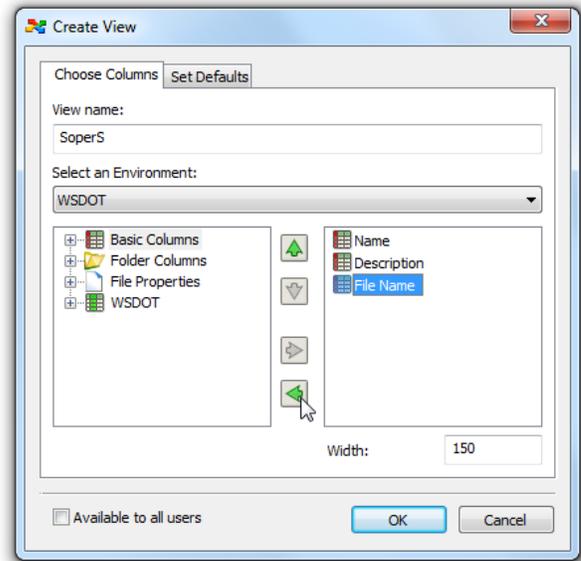
When the window opens, no views will appear unless you check the **Show global** box in the lower left corner.

To create a new view, select **New**.



The **Create View** window opens - type in a **View Name**:

The left side shows the available information columns in 4 groups. The right side shows the columns in the view being created. By default there are 3 columns: **Name**, **Description** and **File Name**. Between the right and left areas there are 4 arrows. The up and down arrows move a selected item on the right side up and down the list. The right and left arrows move items from one side to the other. In this image, File Name is selected and clicking on the left arrow will remove it from the list.



### 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.

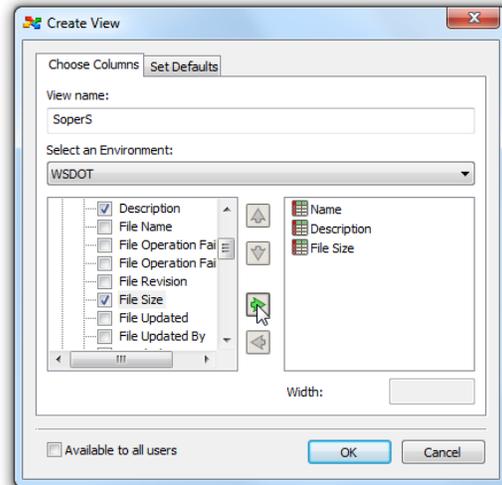
ProjectWise is a file management system working from a database. When a file is brought into ProjectWise, a column is created in the database to track the file – this is the document. That means that every “object” in ProjectWise typically has both a document name and a file name. By default, when you bring a file into ProjectWise, it uses the name of the file to populate the document name and the description. Though it isn’t critical, you should strive to keep these names synchronized. 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. In this case most users would prefer to see when the file has been updated – especially since the document that tracks the file may never be updated.

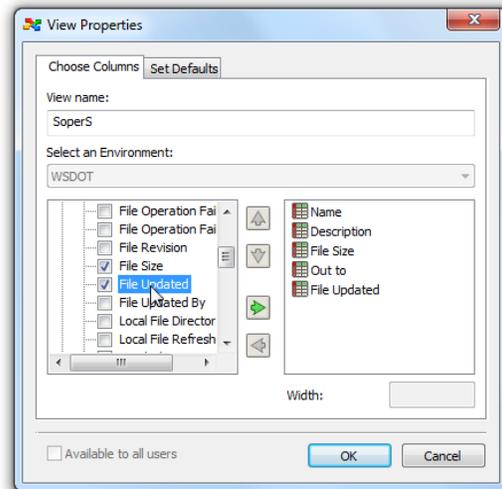
Because the file name is usually the same as the document name, we will remove **File Name** from our custom list. Select **File Name** on the right side and then the green left arrow to remove it.

Begin adding items by clicking on the + symbol next to **Basic Columns** to expand it.

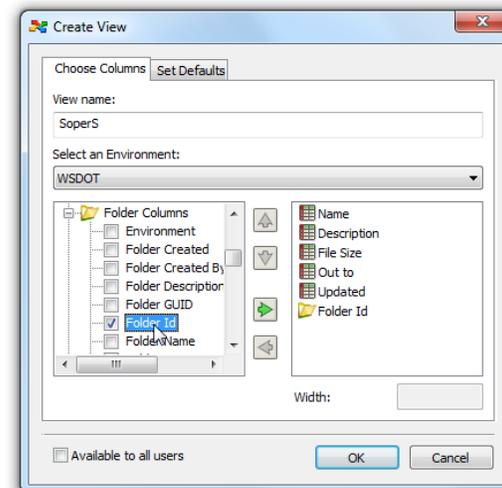
Scroll down to **File Size**, select it and click on the right green arrow to add it to the list. You can also double-click on an item to add it to the list.



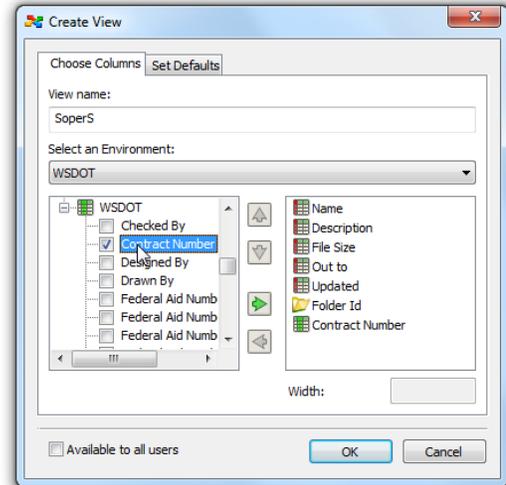
From the **Basic Column** also add **Out to** and **File Updated**.



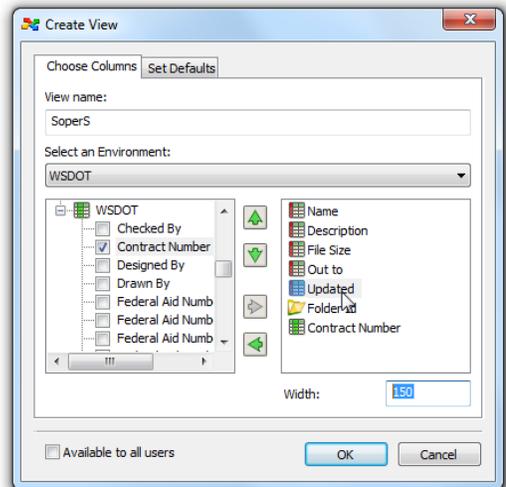
Next, expand the **Folder Columns** and add **Folder Id**.



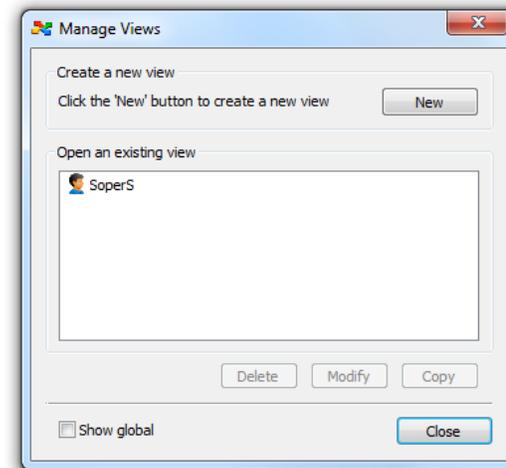
Expand the WSDOT column. This shows the attributes that are contained in the WSDOT attribute page. Add one of these to the list.



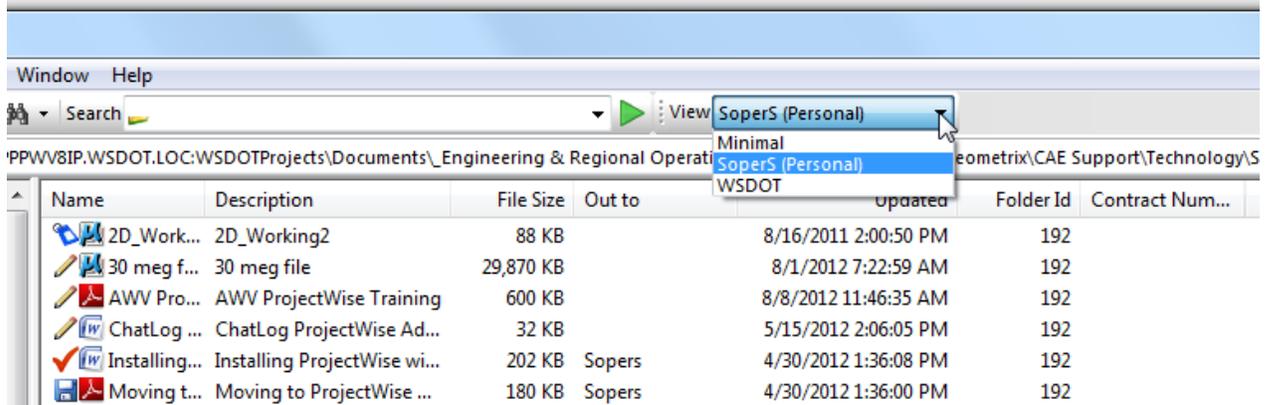
At this point you can make some adjustments to the columns in this view. Selecting an item on the right you can move it up or down on the list using the arrows (higher on the list will keep it further to the left in the ProjectWise folder) as well as changing the **Width** of the column.



Once the custom view is created select OK and the Manage Views window shows the new view. Notice that Show Global is not checked and so the window only shows personal views.



In ProjectWise, click on the **View** pull-down arrow and the new personal view appears. Select that view and the column information changes.



If you view different types of information you can create custom views that allow you to see pertinent information such as Right of Way, Design Files or MicroStation.

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

[HQCAEHelpdesk@wsdot.wa.gov](mailto:HQCAEHelpdesk@wsdot.wa.gov)

360-709-8013