# Lab 4 -Working with Documents

ProjectWise uses a Check-Out and Check-In process as the way to make sure that only one person at a time is modifying documents.

### **Chapter Objective**

- Understanding how documents are managed
- Open documents Read Only
- Open documents for editing
- Creating documents

## Lab 4.1 - Opening Documents

You will need to create a folder on your computer for this lab. On your C drive, create a folder called Projects. Under projects, create the subfolder 93222.



### How Documents are Managed with ProjectWise

When a document is opened from ProjectWise, a copy of the document retrieved from the ProjectWise server is placed in the user's local Working Directory.

The copied document is then viewed or edited by the user. When the user has completed the edits, the document is checked back into ProjectWise and the updated information from the local copy is replaced on the ProjectWise server.

Unlike when a document is opened on a network drive, information is not constantly being sent back and forth over the network. ProjectWise compresses the document before copying it to the local computer. When the document is checked back into ProjectWise, only the changes to the document are saved allowing for the transfer speed to run faster

## **Open Document Read-Only**

To view a document using its associated software without fear of modifying the document, the user can open the document *Read-Only*.

1. From the **\Design\Working\** student folder, **Right-Click** on *Timeline\_Schedule.xlsx* and select **Open as Read-Only**.

*Note:* This will open the spreadsheet but not check the document out.



2. Review the document in the *Document List*. Notice that the document icon has not changed. By opening the document Read-Only, the document is still available for others to edit.



3. Close the document.

### **Open Document for Editing**

Document editing is typically completed from within ProjectWise. There are also times when a user might need to export a document to be worked on without ProjectWise running. Both of these methods will be reviewed.

There are two ways to open a document from ProjectWise. The first and easiest method is to double-click on the document. This will open the document using the correct software.

- 4. From the **\Design\Working\** student folder, **Double-Click** on *Memo-Kickoff\_date\_change.docx*. This will open up the document using Microsoft Word.
- 5. Review the document in the *Document List*. Notice that the document icon has changed to the checked out icon. By opening the document for editing, the document cannot be edited by others.



- 6. Exit Word the word document *without* any edits. This will bring up the *Check In* box.
- 7. Since there were no edits completed, select the **Free** button. This will check in the document showing there were no edits involved in the document history.

Check In		×
General Comment		
Documents		
Name	Version	Des
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<		P.
Folder: Training\PW End User Training\PW Training Folder Templates\93222-End_User_Student##_Template\Design\Working		
Version:		
Check In Update Server Copy Free	Cance	el

The second method of opening can be completed by **Right-Clicking** on the document and selecting **Open**.

- 8. **Right-click** on the *Memo-Kickoff\_date\_change.docx* document.
- 9. **Select Open** from the pull-down. Once again, the document will be opened with Microsoft Word.



10. Change the name Jack Reed to Frank Star then Save the document.



- 11. After saving the document, close Microsoft Word. This will open the **Check In** dialog box.
- 12. Select the Comment tab in the Check In dialog box and enter Change contact name.
- 13. Select the **Check In** button to check the document back into ProjectWise.

### **Documents without Associated Software**

- 14. There may be times when documents have been saved to ProjectWise that do not have associated software assigned to it. In these cases, if the software has been installed on the user's computer, the document can be still be opened and checked out.
- 15. **Right-click** on the **Adobe PDF** document *Project\_Attribute\_Information.pdf*.

16. Select Open With...

✓ <sup>™</sup> Project_Attribute_Information.docx				1
Project_Attribute_Inform	natio	n.ndf		
2 Timeline_Schedule.xlsx		Select View	•	1
		New	•	
		Open		
		Open as Read-Only		
		Open With		
		Markup		

- 17. Highlight the Adobe Acrobat from the list.
- 18. *Note:* Clicking the Browse button will list available software loaded on the computer.
- 19. Toggle ON Open document as read-only.
- 20. Select the OK button.

Memo-Kickoff_date_ch	ange.do	cx	1	Memo - Kickoff date cl	ange Memo-Kickoff_date_change.docx
Project_Attribute_Infor	No.	en document with			
Project_Attribute_Infor					
2 Timeline_Schedule.xls	Select	t			
	Pro	gram			
	N	lame	Description	Application	
		Adobe Acrobat Document	Adobe Acrobat 9.0	"C:\Program Files (	x86)\Adobe\Acrobat 10.0\Acrobat\Acrobat.exe" "%1"
	•		III		۴.
		Always use this program	_		Browse
	Clic	Open document as read-only k here for a list of suggested d	ocument viewers		
					OK Cancel

- 21. The document is open Read-Only. Exit the document.
- *Note:* Since the document was opened Read-Only, when the document has been closed, there is no need to check it in.

### **Checking Out or Exporting Documents**

Documents can be downloaded to the local computer to be worked on at a later time and still have the document locked so others cannot complete any edits.

The first method, **Check Out**, will check out the document to the users local Working Directory. Because it is easier to manage documents by saving them to a known location, the workflow used at CDOT is to **Export** documents.

- *Note:* Documents should only be Exported as a managed copy (to be saved at a later time) if there is a need to work offline.
- 22. **Right-click** on the *MicroStation* document 93222DesignModel01-EUC.dgn.

23. Select Export from the pull-down menu.

PW End User Training\PW Training Folc	Select View
<ul> <li>► List Spatial</li> <li>Name</li> <li>✓ M 93222DesignModel01-EUC.dgn</li> <li>▲ 93222DesignModel02-EUC.dgn</li> <li>✓ M 93222DesignModel03-EUC.dgn</li> </ul>	Open as Read-Only Des Open With 332 Markup 332 View 332
Document5.pdf     Document5.pdf     Memo-Kickoff_date_change.docx     Project_Attribute_Information.docx     Project_Attribute_Information.pdf	Check Out Do Check In Me Free Pro Copy Out Pro
E Imeline_schedule.xlsx	Export Import Update Server Copy Befreth Local Copy

24. The Document Export Wizard will start. Select the Next button.

Documents can either be exported as a managed or unmanaged copy. A managed copy checks out the document and locks it in ProjectWise. An unmanaged copy creates a copy of the document on the local computer without checking the document out of ProjectWise.

- 25. In the *Choose an action to perform* section of the *Document Export Wizard*, **Toggle on** the **Export – Locks document**, **changes can be reimported**.
- 26. In the *Export folder:* section, **select** the **Browse** button and navigate to **C:\Projects\93222**.

#### 27. Select Next to continue.

Document Export Wizard	×
Define the export settings Please choose an action to perform and specify the export folder. Press Next to start document export.	
Choose an action to perform  Export - Locks file, changes can be re-imported  Send to Folder - Creates unmanaged local copy  Export folder:	
C:\Projects\93222	
< Back Next > Can	cel

The MicroStation design file will be exported to the *C:\Projects\93222* folder where it can be worked on later.

- 28. Select the Finish button to close the dialog box.
- 29. Open *Windows Explorer* and navigate to the *C:\Projects\93222* folder to see the local copy of the document.



This document can be edited and checked in at a later time.

30. Review the document in the *Document List* area in ProjectWise. Notice that the document icon has changed to the **Exported** icon.



### **Importing In Document**

Exported documents can be checked in by right-clicking on the document and selecting Import.

- 31. **Right-click** on the *93222DesignModel01-EUC.dgn* design file.
- 32. Select Import from the list. This will open the Check In Document dialog box.

Name	Copy Out
93222DesignMos	Export
🥒 🖊 93222DesignMoc	Import
Document5.pdf	Update Server Copy

33. For a comment, enter *Edits from markups* and *click* the **OK** button to close the Check In Document dialog box.

Check In Document			<b>—</b> ×
Comments			
Enter Comment: Edits from markups			
Previous Comments:	 		•
		ОК	Cancel

The document has now been checked back into ProjectWise and is now available. When the document is checked in, the local copy is deleted from the computer.

### Lab 4.2 - Creating Documents

ProjectWise has a Wizard that can be used to create new documents but it is not a recommended workflow at CDOT. The recommended workflow is to drag and drop documents from Windows Explorer into ProjectWise.

1. From the start menu on the local computer, open Microsoft Word and create a new document.



- 2. In the Word document, **key-in** *Class Word Document* then save the document.
- 3. Save the document to the C:\Projects\93222 folder.

W Save As	
C:\Projects\93222	
Organize 🔻 New folder	
🎒 MSOCache	<ul> <li>Name</li> </ul>
🌗 My Music	
🌗 PerfLogs	
Pictures	
🌗 Program Files	
🌗 Program Files (x86)	
🌗 ProgramData	
🌗 Projects	
93222	+
File name: Class Word Document.docx	
Save as type: Word Document (*.docx)	

- 4. After saving the document, **close** Microsoft Word.
- 5. Navigate to the **\Design\Working** folder in your ProjectWise student folder.

6. From Windows Explorer, drag the new document into ProjectWise Explorer. The Select a Wizard dialog box will open.



7. In the Select a Wizard dialog box, click the No Wizard icon and click OK.

Select a Wizard  Document Creation Wizards  No Wizard  Advanced  Wizard  Make this wizard the default	OK Cancel
Make this wizard the default.	

8. The new document is now available in ProjectWise.

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Name	Description	Vers
🥒 🖊 93222DesignModel01-EUC.dgn	93222DesignModel01-EUC	1
🔒 🚧 93222DesignModel02-EUC.dgn	93222DesignModel02-EUC	1
🥒 🚧 93222DesignModel03-EUC.dgn	93222DesignModel03-EUC	1
Class Word Document.docx	Class Word Document	1
Document5 ndf	Document5	2