

Lab 4 -Working with Documents

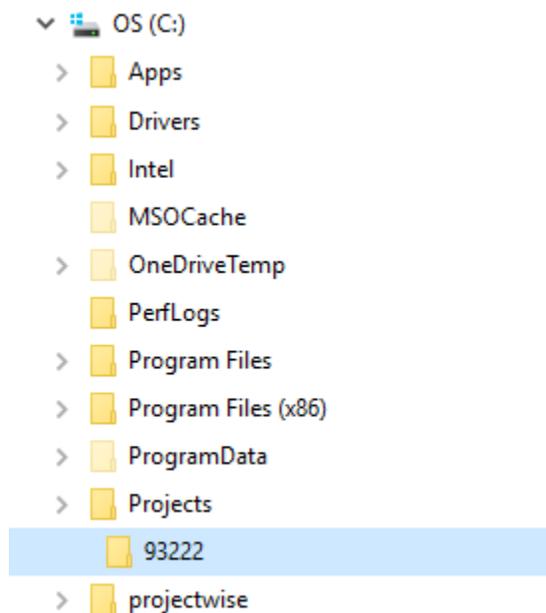
ProjectWise uses a Check-Out and Check-In process as the way to make sure that only one person at a time is modifying documents.

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.

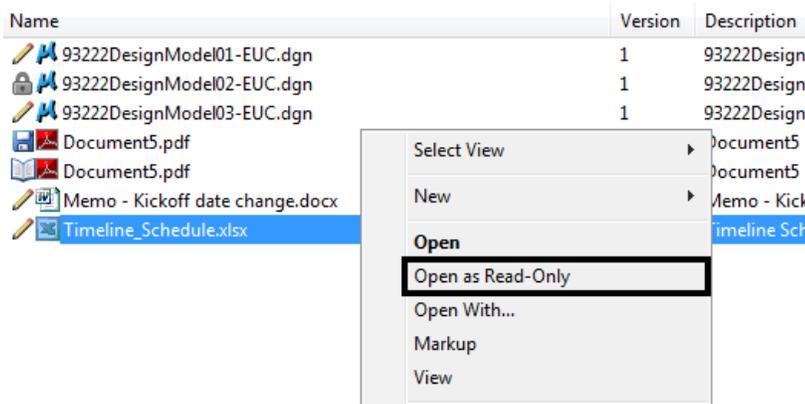
Unlike when a document is opened on a network drive, information is not constantly being sent back and forth over the network. ProjectWise compresses the document before copying it to the local computer. When the document is checked back into ProjectWise, only the changes to the document are saved allowing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

Open Document Read-Only

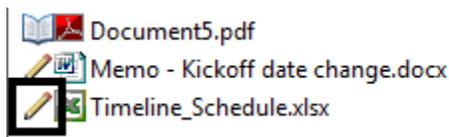
To view a document using its associated software without fear of modifying the document, the user can open the document **Read-Only**.

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.



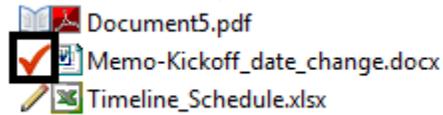
3. **Close** the document.

Open Document for Editing

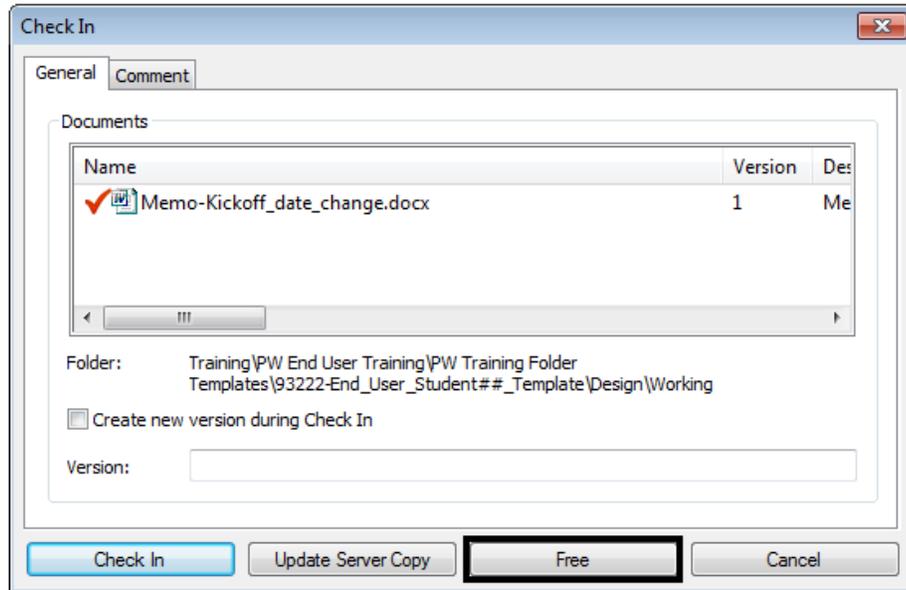
Document editing is typically completed from within ProjectWise. There are also times when a user might need to export a document to be worked on without ProjectWise running. Both of these methods will be reviewed.

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.

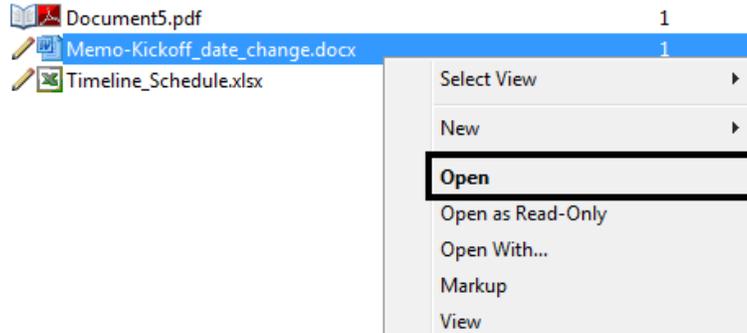


6. **Exit** Word the word document **without** any edits. This will bring up the **Check In** box.
7. Since there were no edits completed, select the **Free** button. This will check in the document showing there were no edits involved in the document history.

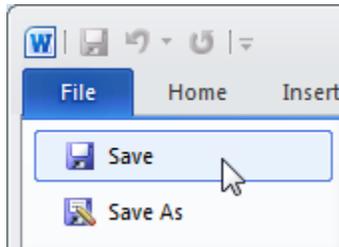


The second method of opening can be completed by **Right-Clicking** on the document and selecting **Open**.

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.

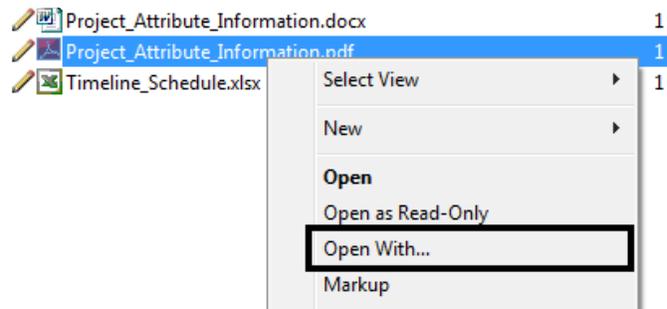


11. After saving the document, close Microsoft Word. This will open the **Check In** dialog box.
12. **Select** the **Comment** tab in the **Check In** dialog box and enter **Change contact name**.
13. Select the **Check In** button to check the document back into ProjectWise.

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...

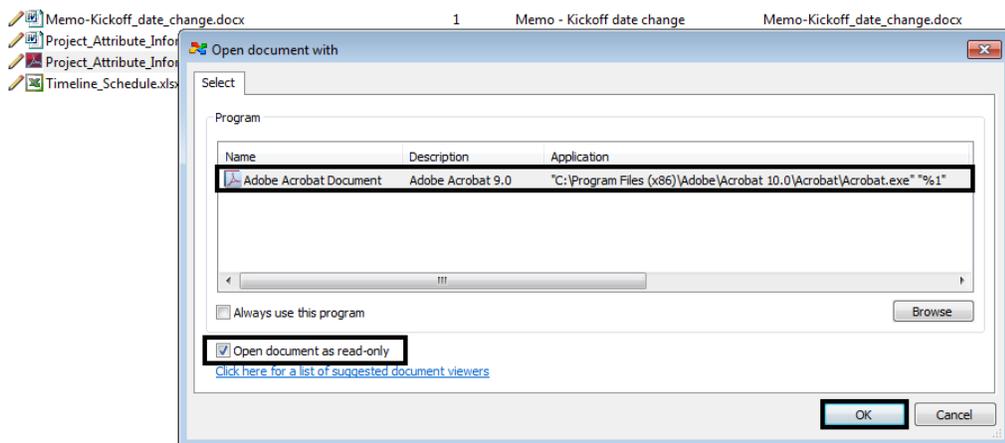


17. **Highlight** the **Adobe Acrobat** from the list.

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.



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

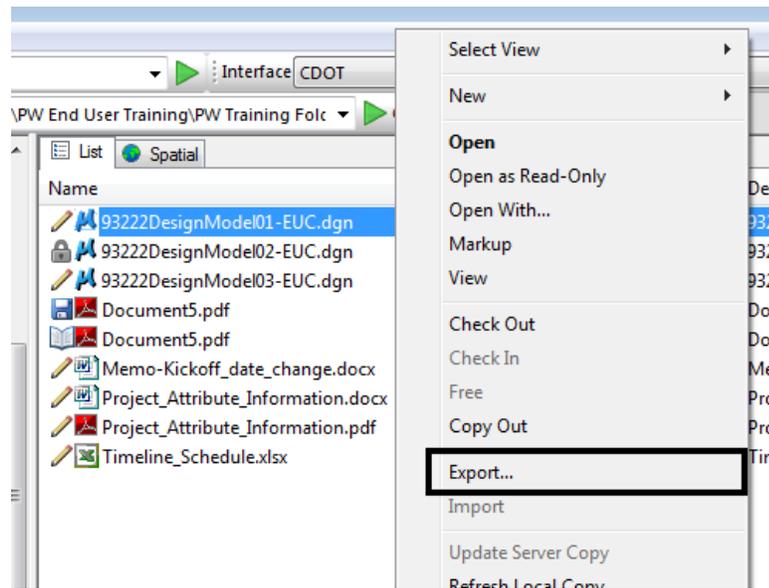
Documents can be downloaded to the local computer to be worked on at a later time and still have the document locked so others cannot complete any edits.

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.



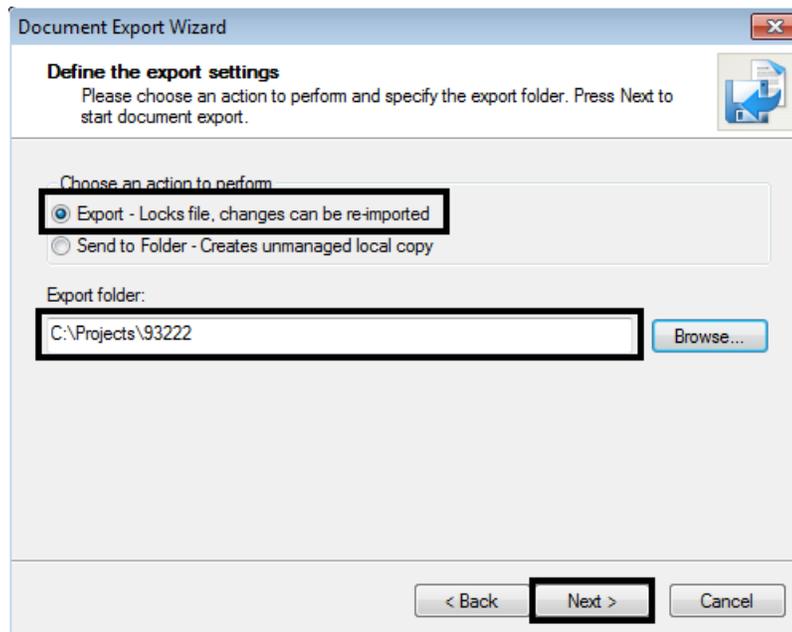
24. The **Document Export Wizard** will start. Select the **Next** button.

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 re-imported**.

26. In the **Export folder:** section, select the **Browse** button and navigate to **C:\Projects\93222**.

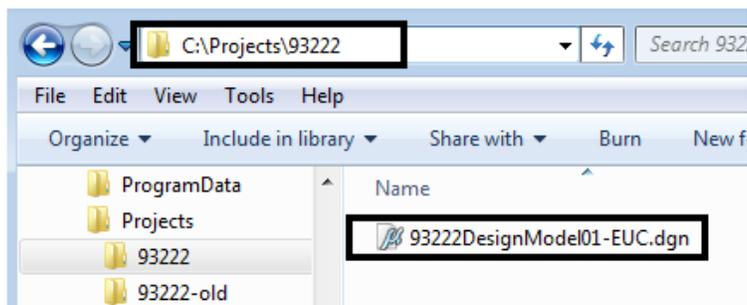
27. **Select Next** to continue.



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

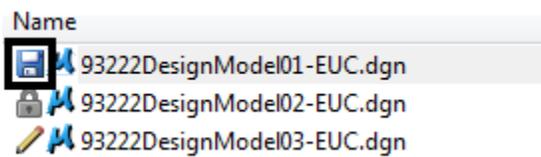
28. **Select** the **Finish** button to close the dialog box.

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.

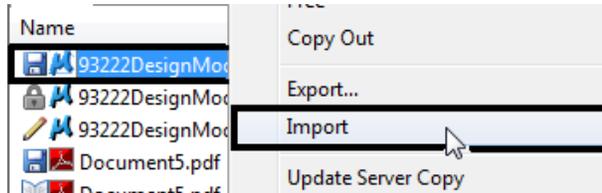
30. Review the document in the **Document List** area in ProjectWise. Notice that the document icon has changed to the **Exported** icon.



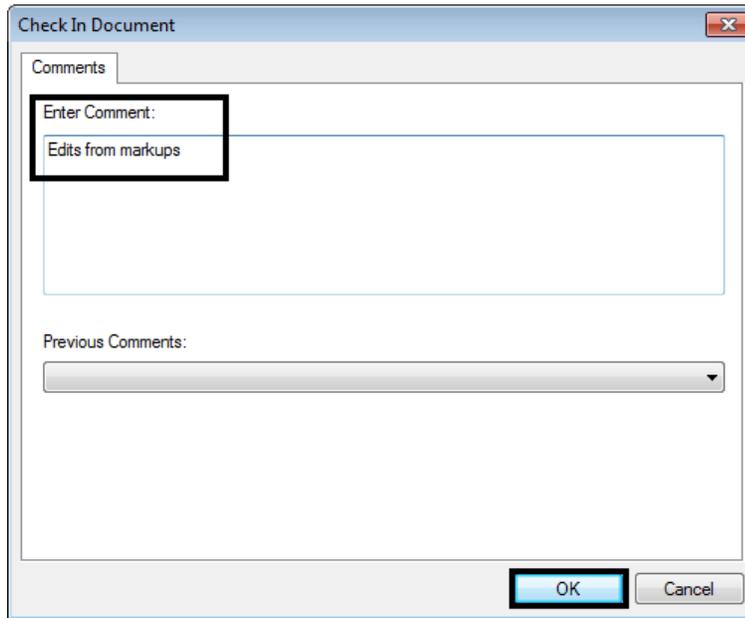
Importing In Document

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.



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

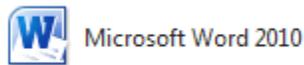


The document has now been checked back into ProjectWise and is now available. When the document is checked in, the local copy is deleted from the computer.

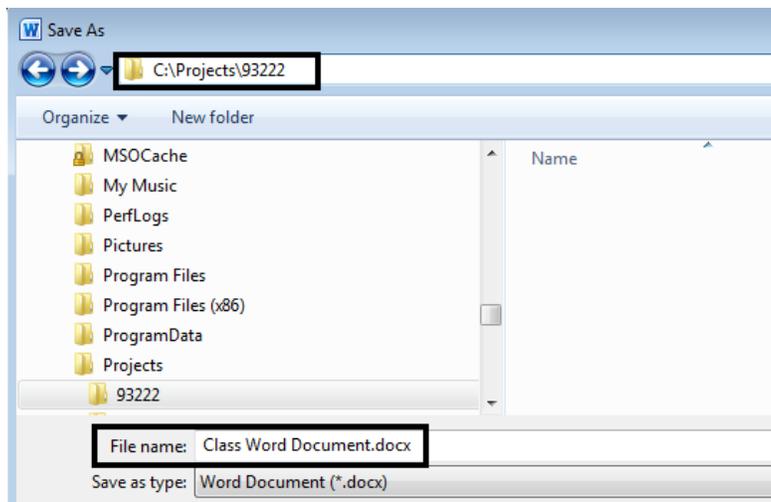
Lab 4.2 - Creating Documents

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.

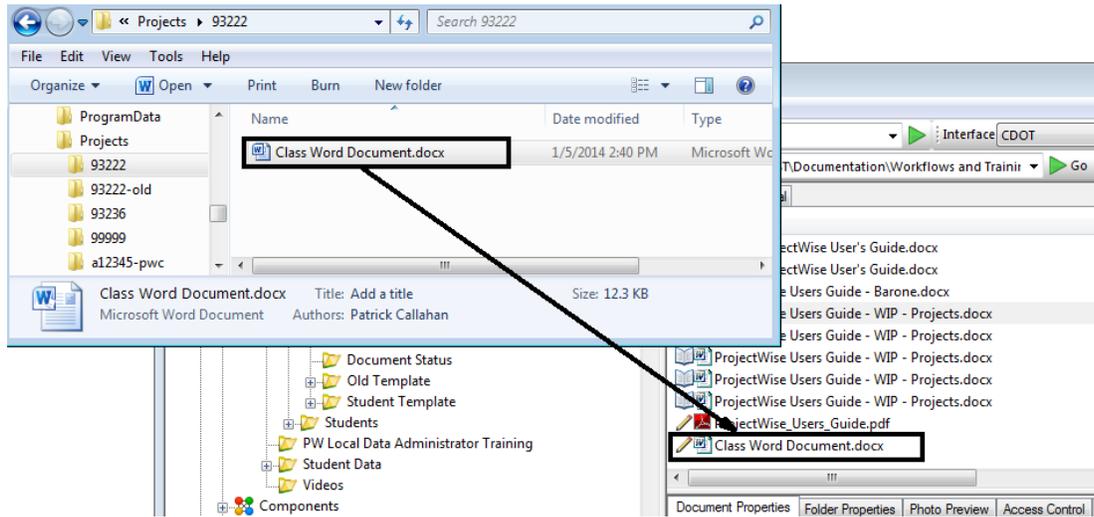


2. In the Word document, **key-in *Class Word Document*** then save the document.
3. **Save** the document to the **C:\Projects\93222** folder.

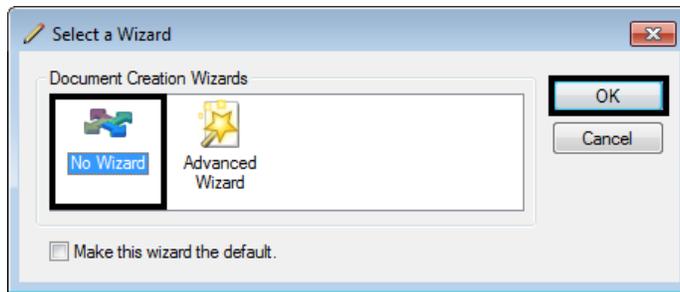


4. After saving the document, **close** Microsoft Word.
5. Navigate to the **\Design\Working** folder in your ProjectWise student folder.

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**.



8. The new document is now available in ProjectWise.

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.pdf	Document5	?