

# Lab 5 -Document Properties and Attributes

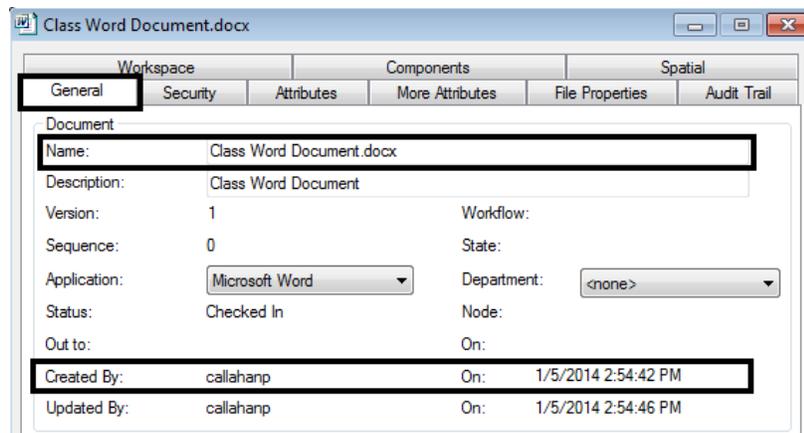
Document **Properties** contain information about a document that is automatically populated and can't be entered manually. Document **Attributes** are extra ProjectWise data fields used to store project specific data for each document. Unlike document properties that get populated automatically as documents are created and modified, attribute information must be entered manually by the user.

## Chapter Objective

- Understanding Document Properties and Attributes.

## Lab 5.1 - Review Document Properties and Attributes

1. Navigate to the **\Design\Working** folder in your ProjectWise student folder.
2. Right-click on the **Class Word Document.docx** document and navigate down and select **Properties**. This will open the Document Properties dialog box.
3. In the **Document Properties** dialog box, select the **General** tab.



**Document name**, **created by**, and **date created** are examples of document properties.

4. **Select the Attributes tab.** Attributes have been created specifically to store CDOT project information.

Class Word Document.docx

General Security **Attributes** More Attributes File Properties Audit Trail Workspace Components

**CDOT - Default** Discipline Administrator

Project Code 93222 Project Number IM 2706-030 Region 06

Residency Name Phone

Resident Engineer RE Initials

Address Fax

City/State/Zip County Adams

Highway No. 076A National Hwy? Yes FHWA Oversight? No

**Related Projects**

	Proj Code	Project Number	Phase
Project 1	12033		D
Project 2			
Project 3			

Save Undo Close |< < 9/9 > >|

Document Properties and Attributes can be used to search for documents within ProjectWise.

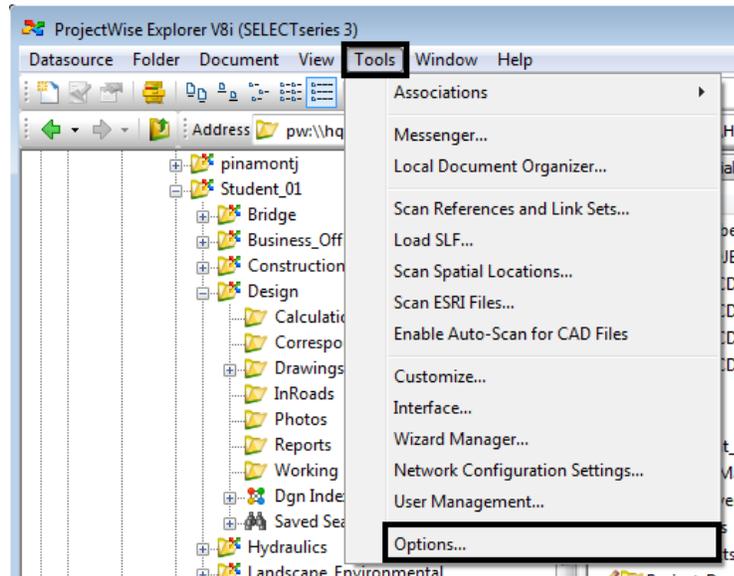
## Lab 5.2 - ProjectWise Document Versioning

You can use ProjectWise versioning to preserve a snapshot of a document at various project stages such as FIR, FOR, etc. When a new version of a document is created, the original document becomes Read-Only securing the document as it was and protecting it from any further edits.

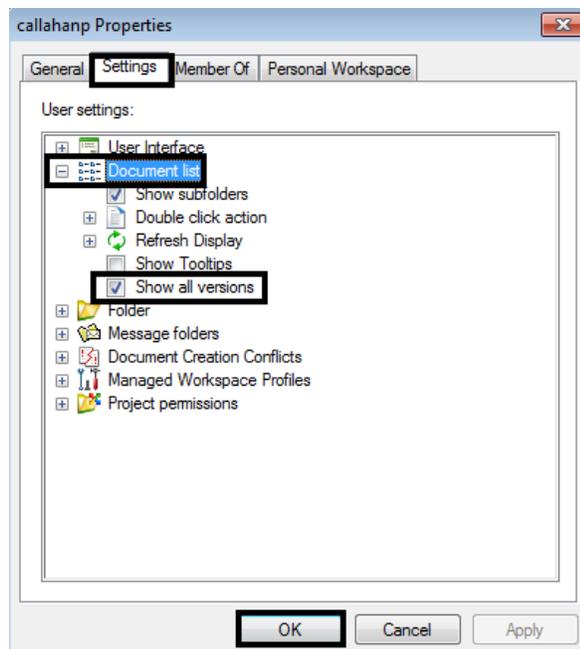
# Showing Versions in ProjectWise

In order to determine if there are any versions of a document already stored in ProjectWise, the option to view versions must be turned on.

1. From the ProjectWise menu bar, select **Tools > Options**. This displays the **Properties** dialog box.



2. In the **Properties** dialog box, select on the **Settings** tab.
3. In the **Settings** tab, expand the **Document List**.
4. Toggle on **Show all versions**, and then select **OK**. This displays the versions and dismisses the **Properties** dialog box.

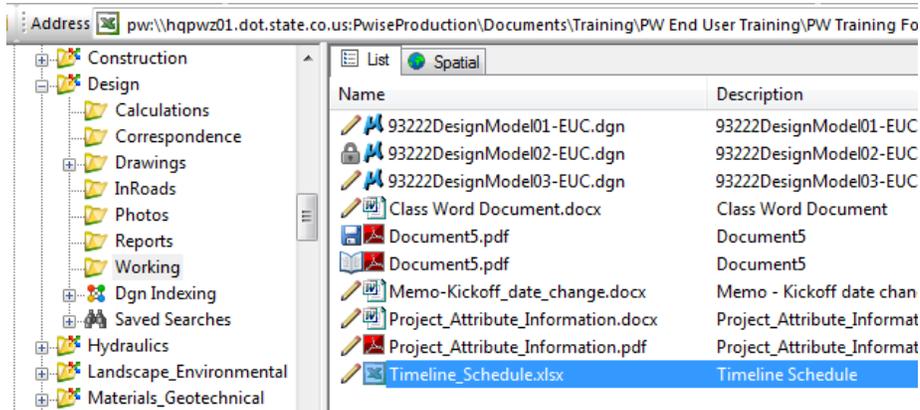


## Lab 5.3 - Create a New Version of a Document

There are two methods of creating a new version of a document; using the Document drop down menu and Copy and Paste.

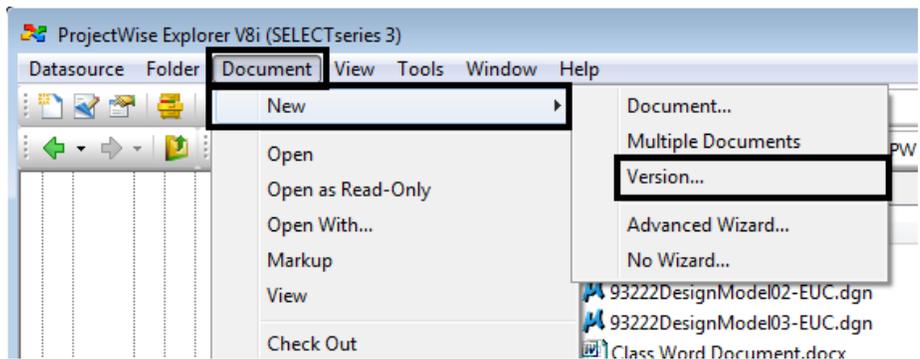
### Create a Version of an Active Document

5. Navigate to your student \Design\Working folder.
6. Highlight the *Timeline\_Schedule.xlsx* document.

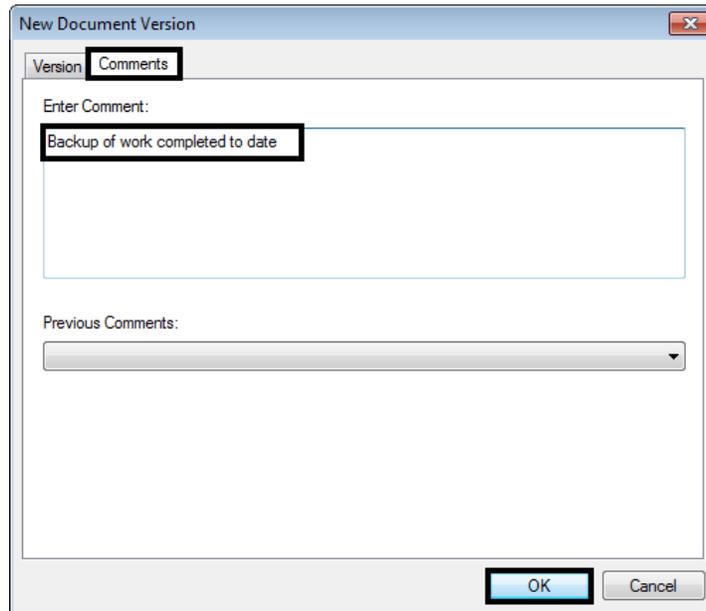


**Note:** The highlighted document must be active (Pencil icon).

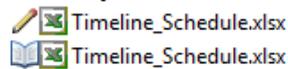
7. From the ProjectWise menu bar, select **Document > New > Version**. This displays the **New Document Version** dialog box.



8. **Select** the **Comments** tab and **enter: *Backup of work completed to date.***



9. **Select** the **Version** tab.  
10. By leaving the **Version** field **blank**, the new version is numbered in sequence with the original.  
11. **Select** the **OK** button. This will create a new version of the document and makes it active. It also dismisses the ***New Document Version*** dialog box.



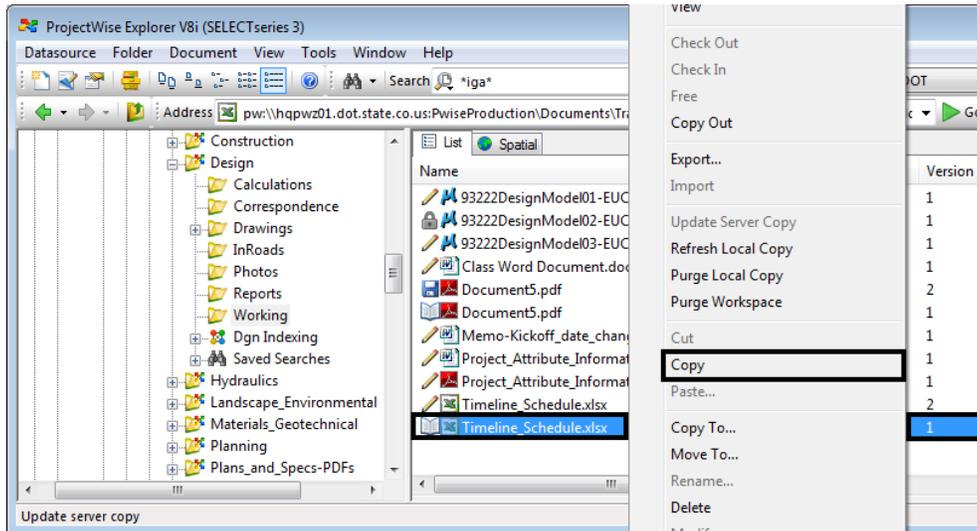
Timeline Schedule  
Timeline Schedule



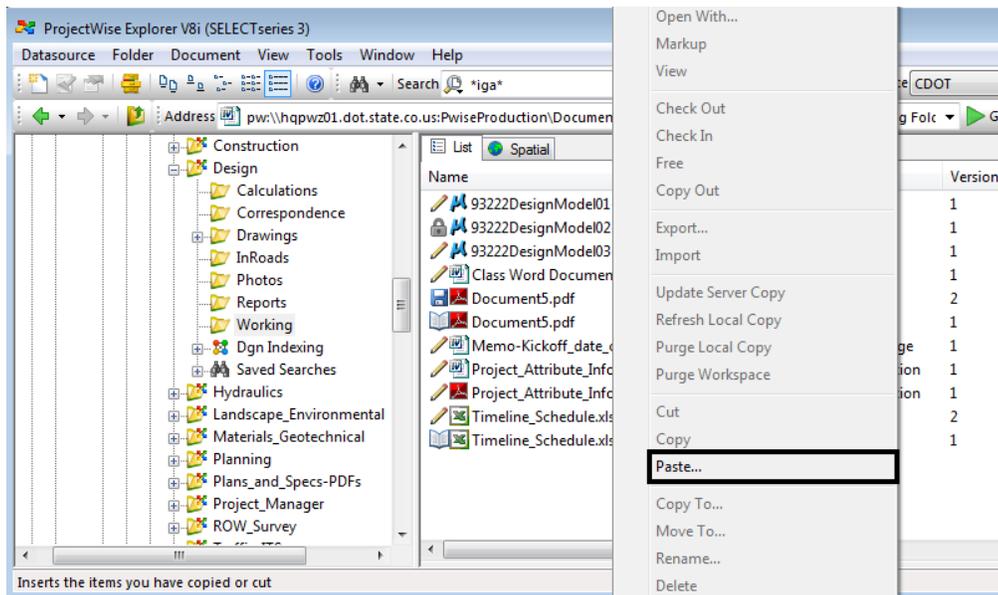
## Creating a Version using Copy/Paste

The Copy and Paste method of creating a new document version can be used on both active and inactive documents.

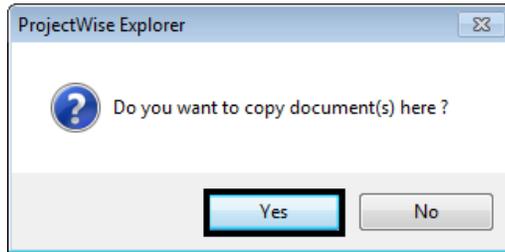
12. **Right-click** on the **Version 1 Timeline\_Schedule.xlsx** document and select **Copy** from the list.



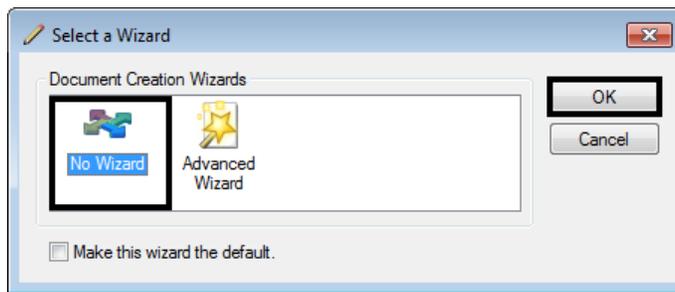
13. **Right-click** in a blank area of the **Document List** pane and select **Paste** from the list. This displays a **ProjectWise Message** window.



14. The message is asking to confirm the location of the copy. Select **Yes** to continue. This displays the **Select a Wizard** dialog box.

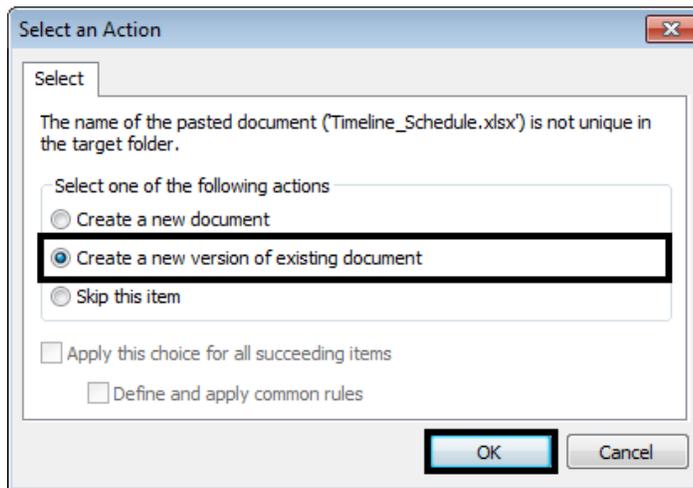


15. **Select No Wizard** and select **OK**. This will open the **Select an Action** dialog box.

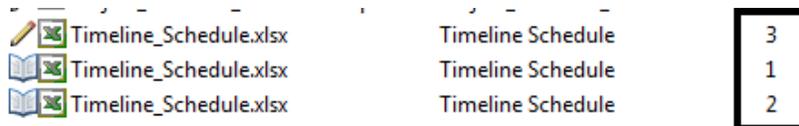


16. In the **Select an Action** dialog box, toggle on **Create a new version of existing document**.

17. **Select OK** to create the version and dismiss the **Select an Action** dialog box.



The new version of the document is numbered sequentially and is made the active version.



## Deleting Documents

***Important!*** Deleting a document in ProjectWise is a permanent action. A deleted document cannot be undeleted. If the document is older than a couple of days, there is a possibility that a backup copy exists.

To delete a file in ProjectWise the user must have the correct permissions to delete or have been the user who created the file. If the user is unable to delete a file, contact the regions ***Local Data Administrator*** to delete the file.