

Brown and Caldwell is using ProjectWise to manage project documents. This document outlines the method to use basic workflows with ProjectWise that provides simplicity, consistency, efficiency and scalability to assisting in sharing work between different locations. Adherence to the workflow described below will help you be successful in delivering your projects on budget and on time.

Summary

To work in a document stored in ProjectWise, it must first be checked out. Once you have made edits to the document you must check the file in or update the server copy and keep the file checked out. This document outlines the check out/ check in process.

Opening/Checking Out and Closing/Checking In documents should always start from within the ProjectWise interface. Always start ProjectWise and navigate to the desired document, then double click to Open/Check Out. Make sure you have the proper file association if using double click. See the document “Open With and Application Associations” for details.

Once checked out, a copy of the file is placed in the local working directory (generally a local hard drive) and the database record is marked as checked out to you. The file status icon will change from a Pencil to a Red Checkmark indicating that the file is Checked Out to you.

You may need to update or edit a document that is currently checked out. The column “Out to” within ProjectWise Explorer will tell you who has the document checked out. You will need to coordinate with that person to make changes.

Option for Editing Documents

- **Double-Click on a Document** - Check-Out the document and open the document with the associated software.
- **Open Check Out** the document and open the document with the associated software.
- **Open With** – Check Out the document and open the document with software you specify
- **Check Out** – Check Out the document but do not open the document.

Note: The double-click action is a user preference. The default action for double-click is to open a document

1. Before Check out



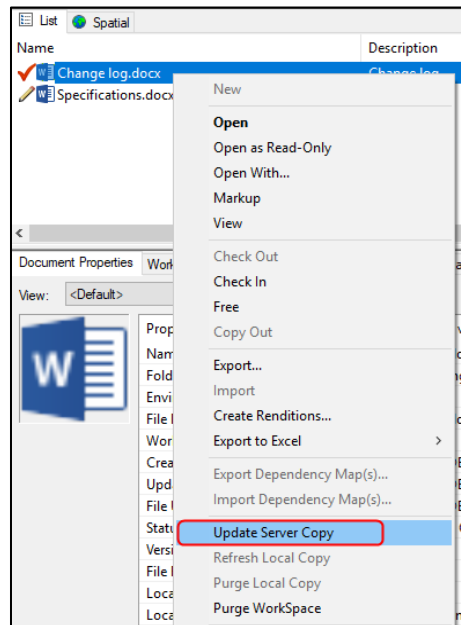
Name	Description
 Change log.docx	Change log
 Specifications.docx	Specifications

2. Once a file is Checked Out

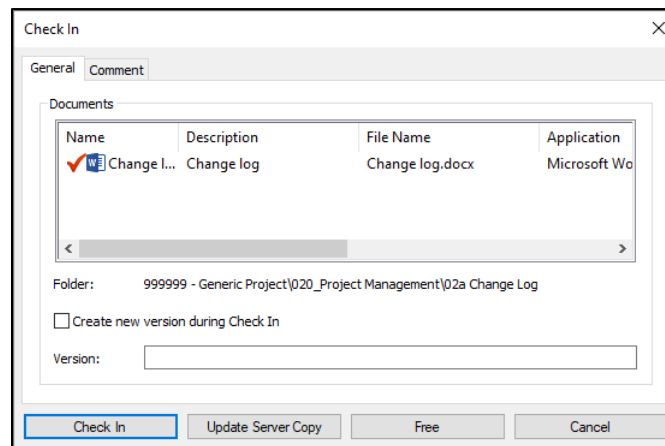
Note: You can only check out documents for which you have read/write privileges and are not opened and locked by another user.



- A user can always refresh the checked out file on the server so that other team members can view or reference the latest version. (Right click on file in ProjectWise and select Update Server Copy.)



- Files are automatically checked out when you open them. When you close the file, you will be prompted to check them back in. Once editing of the document is complete simply exit the application.



*If there is no prompt, go back to the file and right-click and select check-in. Also, you can use the Local Document Organizer to check files back in.

- **Check In** – Checks the file back into ProjectWise.

Updated 3/17/20

ProjectWise - Editing Documents

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Still having trouble?

Internal Users: Create a ticket from the [BC Help Desk](#). Select “Design Technology” as the queue and “ProjectWise” as the category to ensure fastest routing of your request.

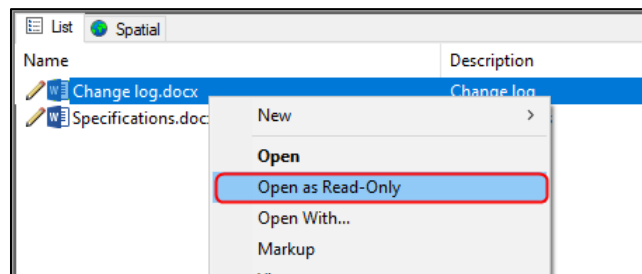
External Users: Contact your Project Manager

- **Update Server Copy** – Keeps the file checked out to you and changes are updated into ProjectWise.
- **Free** - changes the status of a document from checked-out to checked-in without updating the server copy. You can only free files that you have checked out. *Be careful, any changes made to the document will be lost when the document is freed.*
- **Cancel** – The dialog is closed; the file will remain checked out to you.

When a file is checked in, the file is copied back to the server and the file becomes available for other users to check out. If changes are made to a file and a version is needed vs updating the actual file clicking on the 'Create new version during Check In' check box will create a version of the file. It will make the original file read-only and the versioned file the active file.

Read Only

To view a document using its associated software without fear of modifying the document open the document as read-only. From ProjectWise select the desired file, right-click, and select Open as Read-Only.



When you Open as Read-Only, you do not check-out the document and you will not be able to make edits to the document. See the section on Check-Out and Check-In for more information on checking out and checking in a document.