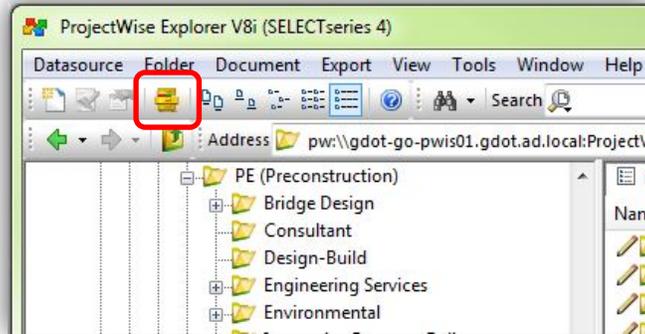


Using the Local Document Organizer in ProjectWise

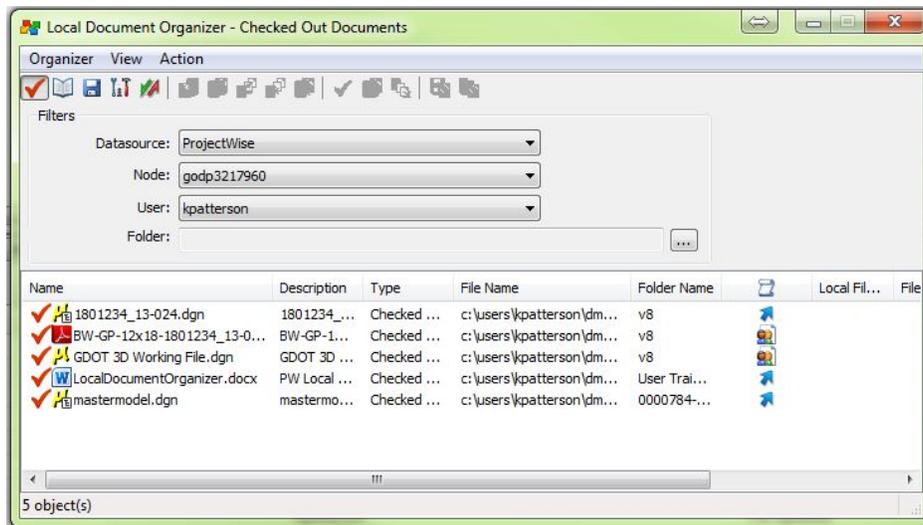
ProjectWise stores copies of files on your local computer when you access them to provide the best performance over the state-wide network. The **Local Document Organizer** gives you a dashboard tool to see the status of your local files while providing file management tools for cleaning up unnecessary copies.

Opening the Local Document Organizer

The Local Document Organizer can be opened by clicking on the **Organizer icon** in ProjectWise Explorer.



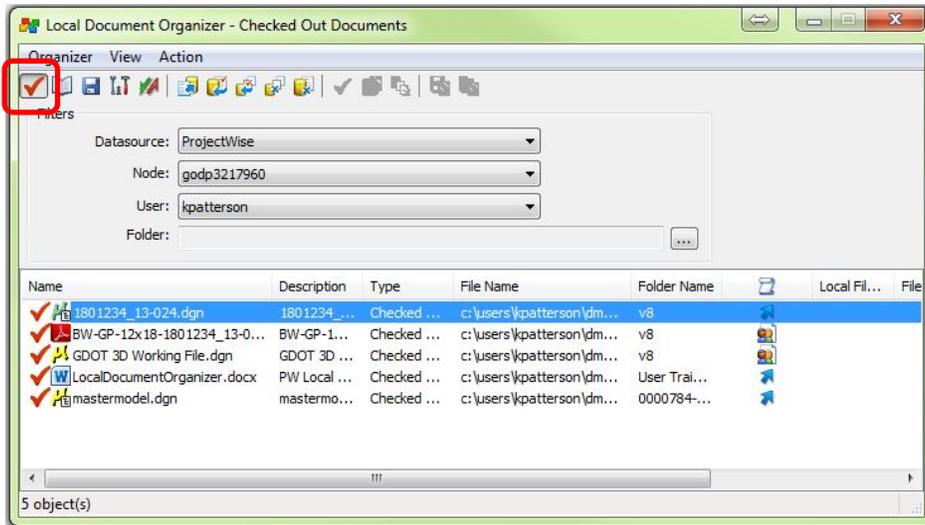
This will open the Local Document Organizer window which initially lists the documents you have Checked Out.



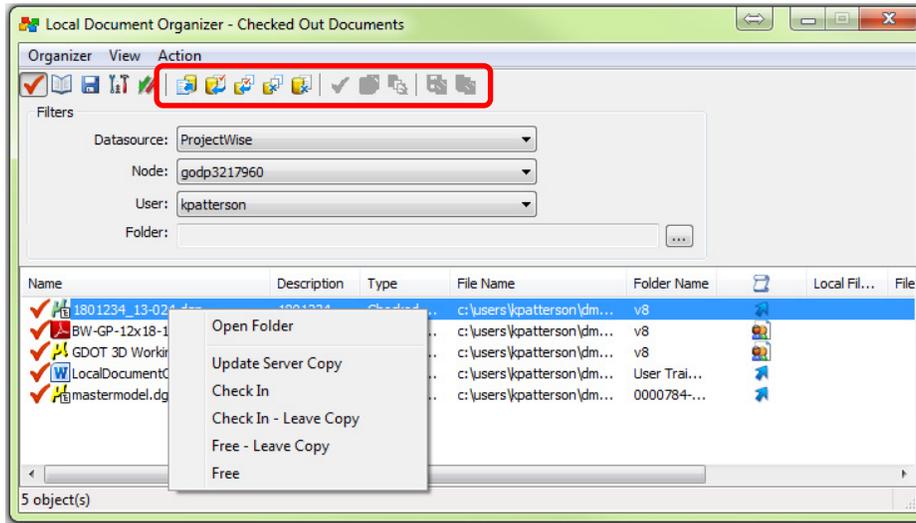
Touring the Local Document Organizer

The Local Document Organizer allows you to view documents based upon their status and their usage. The icons across the top of the window will open different categories of documents within which you can choose many actions to perform on them depending upon their status.

The first icon displays the documents **Checked Out** to you. This is the list that opens by default. The icon is a red check mark which matches the icon used throughout ProjectWise Explorer to signify the checked out status.



Selecting documents in the list will activate other icons across the top, depending upon what actions are available to that particular status area. These functions are replicated in the right click menu.



Open Folder

This option will open the folder in ProjectWise Explorer that contains the selected document.

Update Server Copy

This will update the server copy with any changes made without checking the file back in.

Check In

This option will check the document back into the server and allow other users to open the document for editing. **NOTE:** this action is different from the check in procedure when exiting documents open in

applications because it will also purge the local copy of the document at the same time. The next time you open this same document, the entire file will have to be copied down to your computer rather than just the changes. Typically the next command should be used.

Check In – Leave Copy

This action will check the document back into the server and will keep a local copy on your computer. This command is exactly like checking in a document when exiting an application.

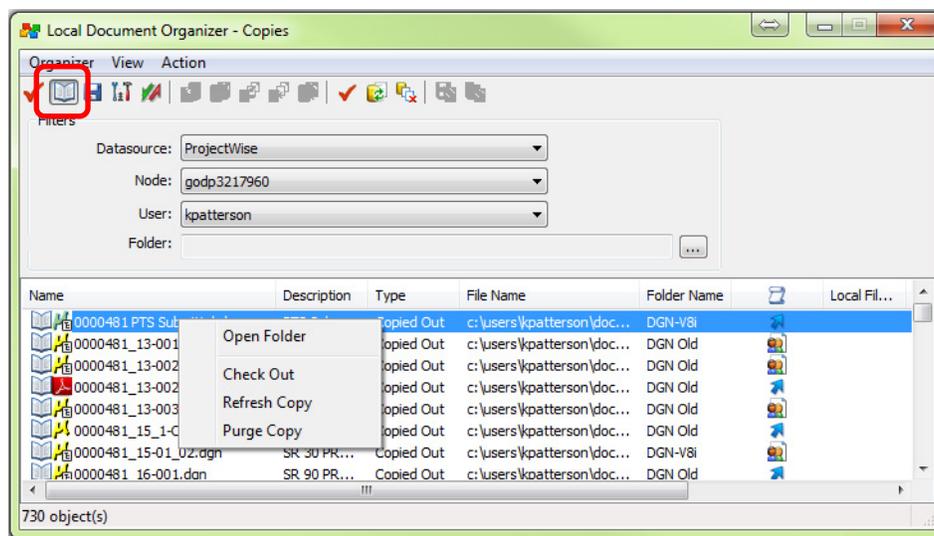
Free – Leave Copy

This action releases the document on the server for other users to access and edit but does not push any changes made to the document to the server. The local copy is left on the computer.

Free

This action releases the document on the server for other users to access and edit but does not push any changes made to the document to the server. The local copy is deleted on the computer.

The next icon displays **Copies** of documents. This list contains all the local copies of documents which originate from any project or folder in ProjectWise.



The additional icons to the right have changed since the status of these documents is different. The same options found in the icons again appear in a right click menu.

Open Folder

This option will open the folder in ProjectWise Explorer that contains the selected document.

Check Out

Since the documents listed are only copies, they may be available for editing. You may check out the document using this action which will lock it down for editing by others but will not open it in the associated application. If another user has the document checked out, you will be denied.

Refresh Copy

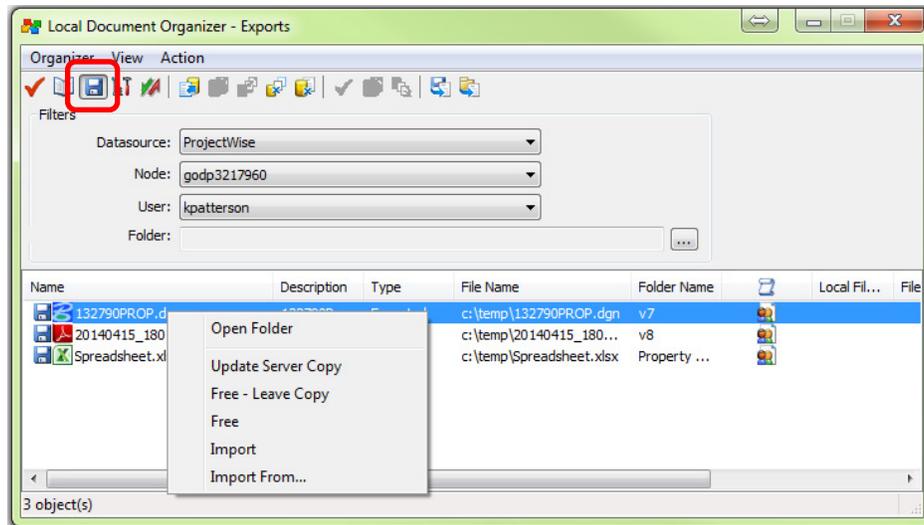
This action will synchronize any changes on the server copy to your local copy.

Purge Copy

This action will delete the local copies from your computer. This will free up space on your computer.

NOTE: This is the only way documents should be deleted from the local computer managed by ProjectWise.

The next icon displays documents you have **Exported** that have yet to be imported back into ProjectWise. This is a useful location to see all the exported documents that need to be imported without having to remember the exact locations throughout ProjectWise where they are stored.



Again, the additional icons to the right have changed since the status of these documents is different. The same options found in the icons appear in a right click menu.

Open Folder

This option will open the folder in ProjectWise Explorer that contains the selected document.

Update Server Copy

This will update the server copy with any changes made while the file remains exported.

Free – Leave Copy

This action releases the document on the server for other users to access and edit but does not push any changes made to the document to the server. The local copy is left on the computer.

Free

This action releases the document on the server for other users to access and edit but does not push any changes made to the document to the server. The local copy is deleted on the computer.

Import

This action will import the document back into ProjectWise from the location where it was originally exported. The document will be checked in and available for other users to access and edit.

Import From...

This action will import the document back into ProjectWise from a different location than where it was originally exported. A window will appear where you can browse to the location of the document to import.

The next icon displays **Workspace** documents. This area should only be accessed through the direction of a ProjectWise Administrator.

