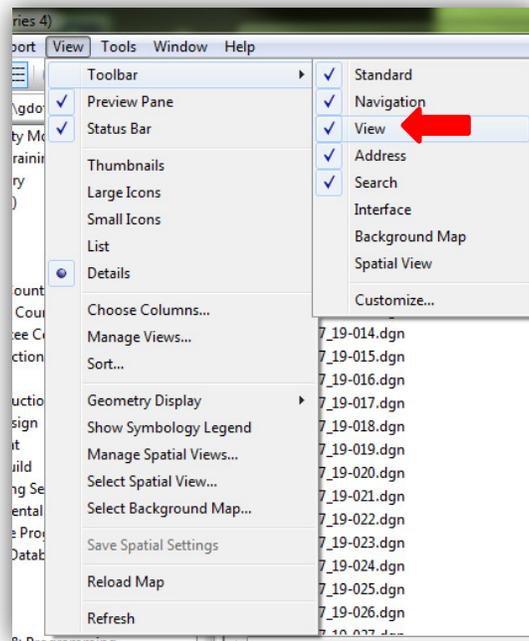


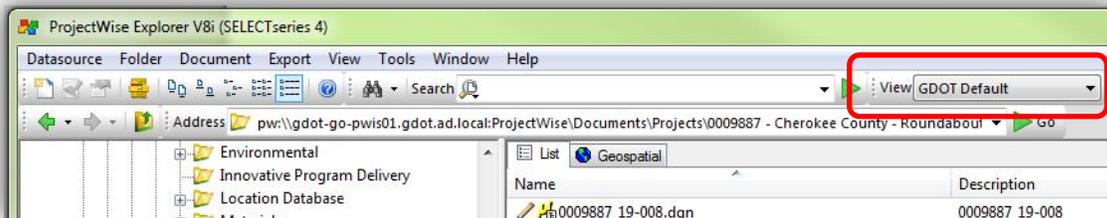
Custom Views in ProjectWise

There is a lot of information to view about documents stored in ProjectWise. **Views** allow you to manage what columns to display which helps filter the list down to information that is relevant.

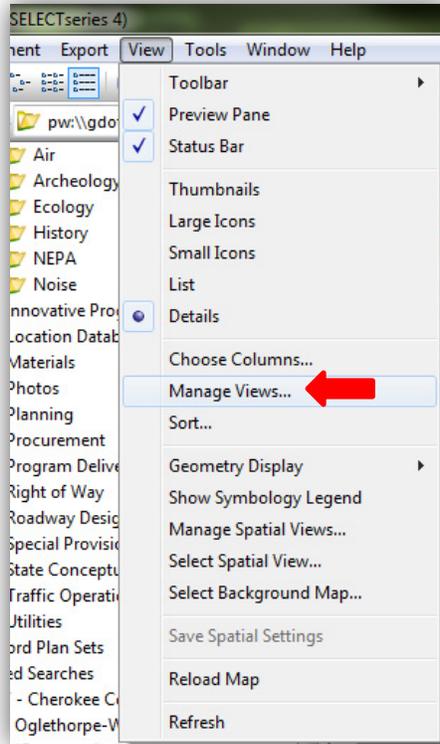
By default, the view used for every location in ProjectWise is a **Global View** named **GDOT Default**. Global Views are created by ProjectWise Administrators and can be used by everyone in ProjectWise. This view contains many useful columns of information for most all document types. To see the current view applied in ProjectWise Explorer, open the **View Toolbar** by clicking on the **View** menu, select **Toolbar**, then select **View**. A checkmark will be next to View when it is displayed in the application.



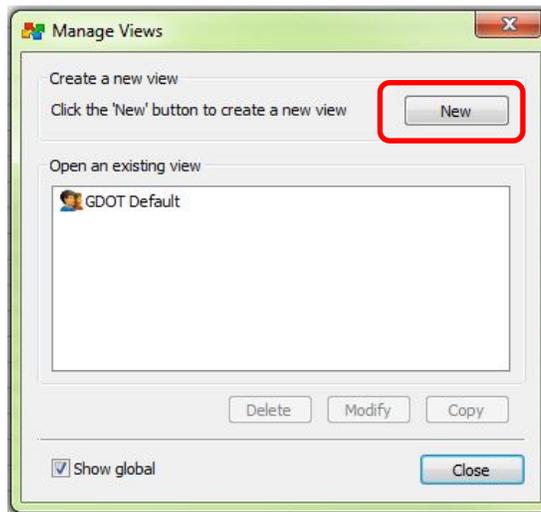
The **View toolbar** is a pick list of available views, both global and personal.



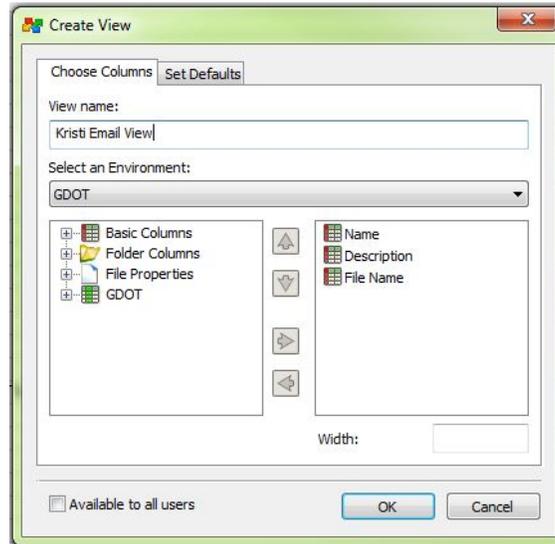
You can create your own views that display the columns you desire. This is useful for viewing information for specific document types, such as email. Information available for emails include from, to, subject, etc., which do not apply to other document types. To create a new personal view, in ProjectWise Explorer go to the **View menu** and select **Manage Views...**



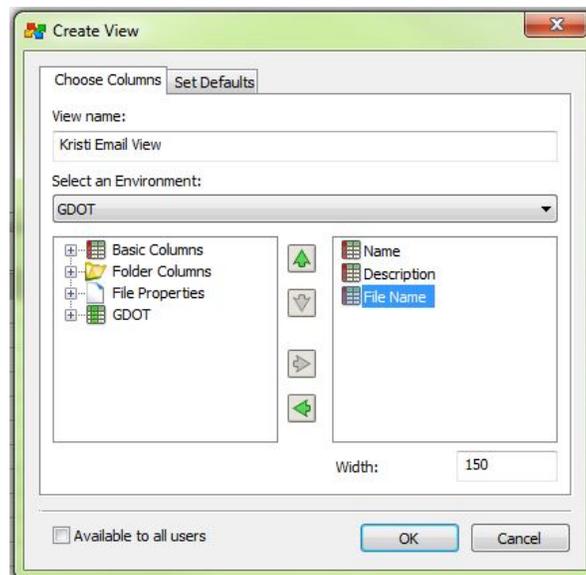
The **Manage Views** window will display. To list the Global views available, check the **Show global** checkbox at the bottom of the window. The GDOT Default should appear. You can use this view as a template if desired by selecting it and clicking on the **Copy** button. If you wish to start from scratch, click the **New** button at the top.



The **Create View** window will display. You need to provide a **View name** at the top. Make sure **Select an Environment** is set to **GDOT** which allows you to access all the GDOT specific properties.



On the left side there are four categories of information from which you can choose columns to add to your view. On the right side is the ordered list of selected columns for the view. Name, Description, and File Name are added to this list by default. In between the two lists are arrow buttons. The **up and down arrows** at the top change the order of the list on the right side. Just select one of the column names on the right and move the column name up or down in the list which controls the display of the column in ProjectWise Explorer from left to right. The **left and right arrows** move items from one list to another. Selecting a column name on the left side and clicking the right arrow will add it to your new view. Selecting a column name on the right side and clicking the left arrow will remove it from your view. As you can see in the image below, File Name is selected on the right which gives the option of using the up arrow to move it up in the list or the left arrow to remove it from the list.



Expand the **Basic Columns** category on the left side. This information is produced and stored by ProjectWise for every document. The three default columns - name, description and file name - all come from this category.

This is a list of the most common columns you might use from this category:

- Application This is the associated application for the document.
- Created Date the document was created in ProjectWise.
- Created By Person that created the document.
- Description The description found under the general properties of the document.
- File Name Actual name of the stored file linked to the database entry for the document.
- File Size Stored size of the file in kilobytes.
- File Updated Date the file was last updated on server.
- File Updated by Person that last updated the file.
- Name The database name of the document, which is linked to the File Name.
- Out to Who has the file checked out.
- State The current state on the document in a workflow.
- Updated Date the database information (properties) was updated for the document.
- Updated By Who updated the database information (properties) for the document.
- Version The current version name of the document.

Expand the **Folder Columns** category. This information only pertains to folders. **Folder Name** may be a useful column to use to show the folder the document resides in, especially in search results.

Expand the **File Properties** category and you will see several sub-categories. Much of this information is not very useful given the Basic Columns listed above.

This is a list of the columns you might use from two sub-categories:

Document Summary Information – useful for Office Documents

- Character Count
- Character with Spaces Count
- Page Count
- Word Count

Mail Message Information

- Attachment Names
- Cc
- From
- Received
- Sent
- Subject
- To

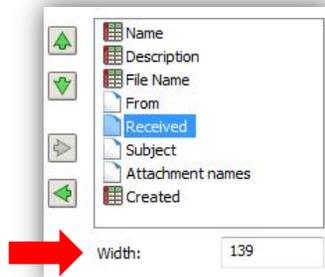
Expand the **GDOT** category. This information contains the specific project and document properties for GDOT. Project properties, such as Project ID (PI Number), Contract ID, Route Number, MPO, etc. can all be found here. Document properties for all document types are also listed here. Placing these properties in a view saves the step of looking at the **Document Properties** for each document.

Once you have all the columns selected and ordered as you wish, click **OK** to create the new view and to close the Create View window.

To make modifications to the personal view, open the **Manage Views** window from the View menu, select the personal view in the list, and click the **Modify** button.



Note: Changes made to the column width in ProjectWise Explorer by dragging the column size will be reflected in the width setting for each column in the View Properties. It is easier to visually size the columns in this way than typing in a value.



Now that you have a new personal view, you can use it in ProjectWise Explorer. In the **View Toolbar**, choose your personal view in the drop down list. You will see the columns in the top right panel change according to your settings.

