# Working with Office Applications and ProjectWise

The main Microsoft Office Applications (Word, Excel, PowerPoint and Outlook) are all integrated with ProjectWise. These applications are aware that ProjectWise is installed and will automatically look to ProjectWise for the *File>Open* and *File>Save As* locations.

The first time you launch an Office Application after ProjectWise is installed, you will be prompted during either the file open or save process to login to ProjectWise. Be sure to choose **ProjectWise** for the Datasource and check the two boxes for **Use Windows Single Sign-On** and **Remember Me**. The Remember Me option will assure you are automatically logged into ProjectWise when working in any Office application and you will not see this window again. Click the **Log in** button to finish.
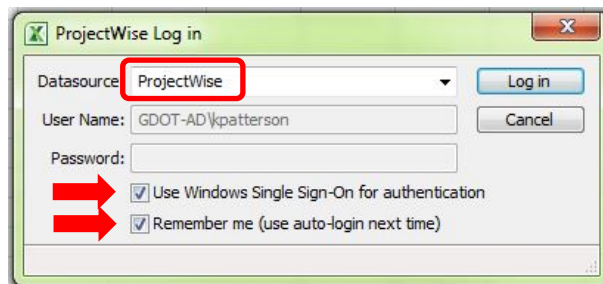


## *Opening Office documents from ProjectWise*

Using the **File>Open** command in Word, Excel, and PowerPoint will display a browse window that looks into ProjectWise for the location.
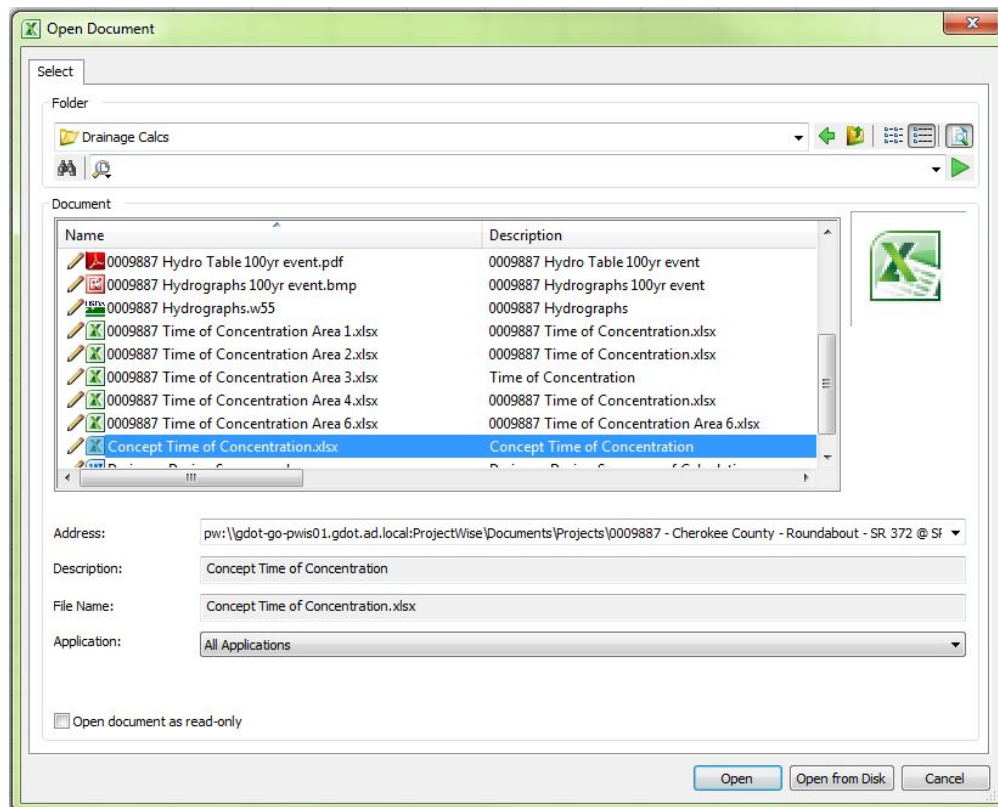
Use this window to browse to the ProjectWise location of the document you desire to open and click **Open**.

If you need to open an Office file outside of ProjectWise, click **Open from Disk** and the normal Windows file browser will display.
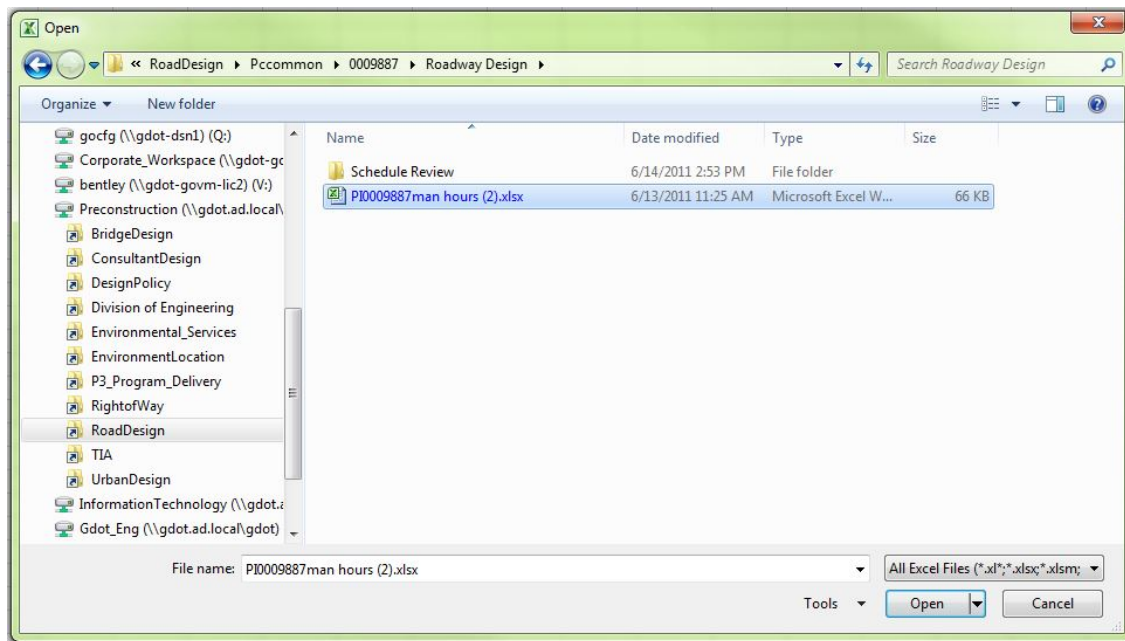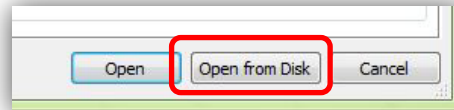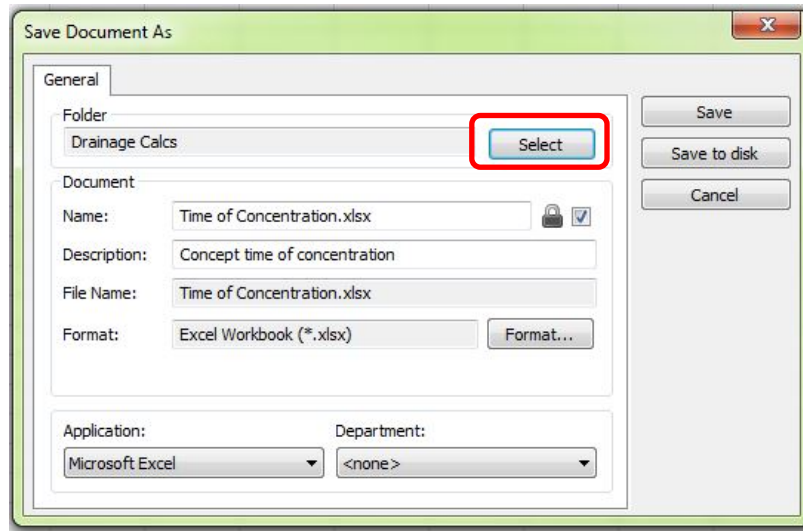




**Note**: It is recommended to keep **ALL** project related documents in ProjectWise to maintain integrity of the information and promote team collaboration.

### *Saving new Office documents in ProjectWise*

Using the **File>Save As** command in Word, Excel, and PowerPoint will initially prompt you to **Select a Wizard** for creating the document in ProjectWise. This window will appear whether you wish to save the document inside or outside of ProjectWise. See the Working with Documents in ProjectWise training document for more information on document creation wizards.

The **Save Document As** window appears which looks into ProjectWise for the output location.  You enter the names and description of the new document here.
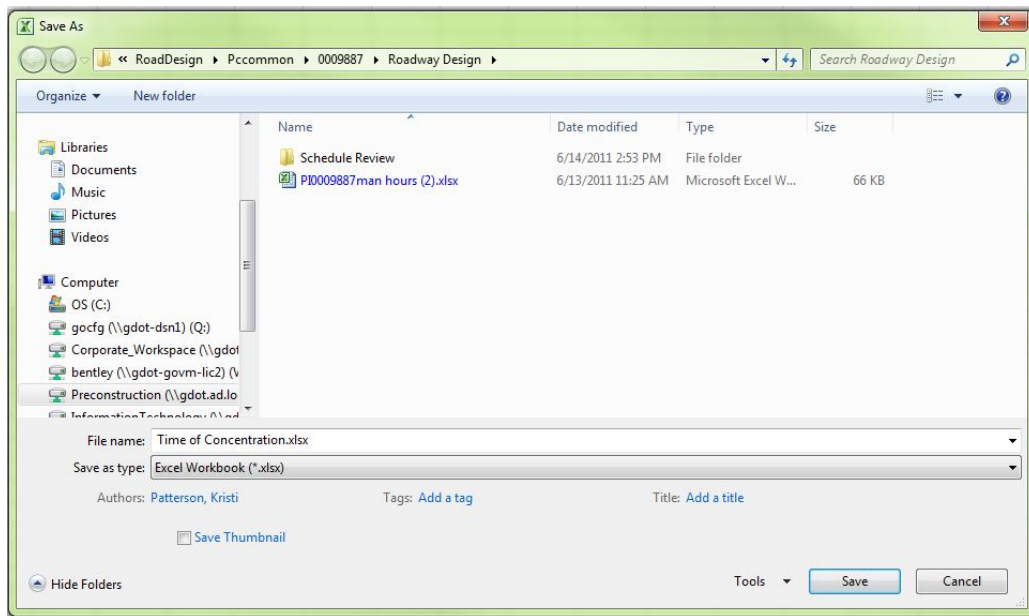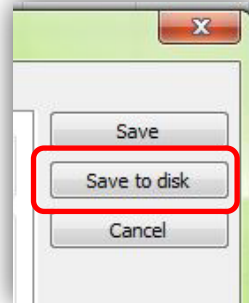


Click the **Select** button to select the folder location in ProjectWise. Browse to the desired location and click **OK**.
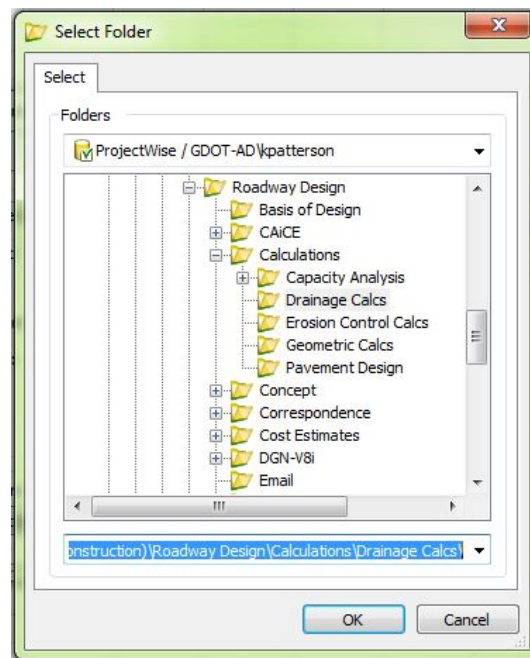


Click **Save** when complete.

If you wish to save the new document outside of ProjectWise, click the **Save to disk** button. This will open the normal Windows file browser.





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### *Saving messages in Outlook to ProjectWise*

Outlook's integration with ProjectWise is different from the other Office applications. You will find ProjectWise tabs in the Outlook application window and in the Email message window. The tools provided inside Outlook make it easy to save messages to ProjectWise and to pull documents from ProjectWise into messages.

There are two ways to save a message into ProjectWise. The easiest way is to drag the message from Outlook and drop it into the desired ProjectWise folder, much like how files can be dragged in from Windows Explorer. The second way is to select the messages you wish to save and select the **Export to ProjectWise** icon on the **ProjectWise** tab. Email attachments can be saved separately using the **Export Attachments** icon.
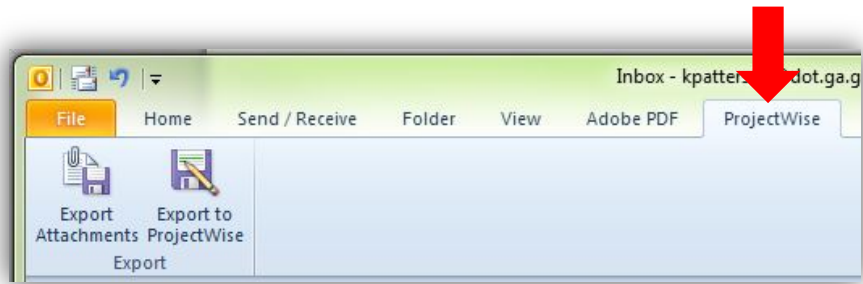
After clicking either icon, you will follow the same steps described in the *Saving new Office documents in ProjectWise* topic above.

When composing a new email message, you will find tools under the **ProjectWise** tab in the message creation window. Along with the export functions mentioned above, there are two additional tools: **Attach Document** and **Document URL**.
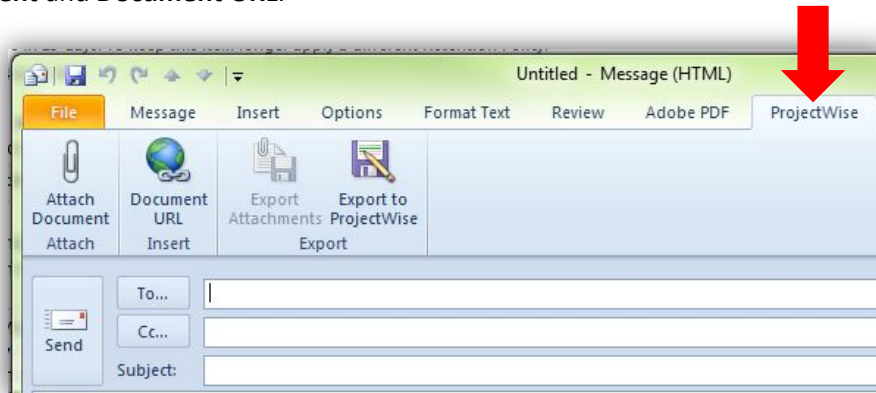


Both of these tools will open a window that lets you select a document from within ProjectWise. The **Attach Document** tool will attach a copy of the file to the email message. This should only be used to send information to people outside of GDOT that are not using ProjectWise.

The **Document URL** tool will create a link to the document's location in ProjectWise. This is the preferred method for communications within GDOT as this maintains the integrity of the project documents.