

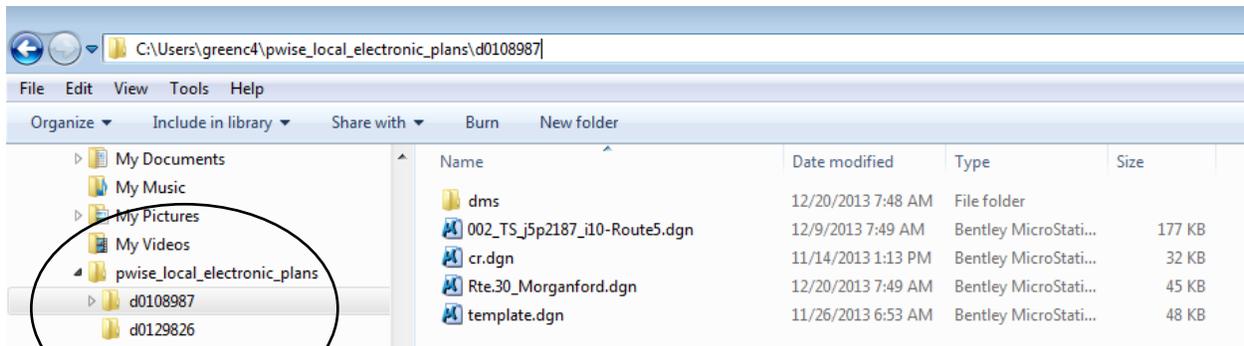


Working with Folders

Folders are tools for organizing. They are arranged in a hierarchical structure. A parent folder can have an unlimited number of child sub-folders, and each child sub-folder can have an unlimited number of its own child sub-folders.

While Windows users will find ProjectWise folders similar to Windows folders, ProjectWise folders have additional properties and features. Of particular interest:

- The files contained in folders and sub-folders can reside in different physical locations. From a user's perspective, the physical location of the files is of little consequence. Navigating ProjectWise folders is accomplished at a logical level and is not directly related to where contents are physically stored.
- The logical structure, which is displayed in ProjectWise Explorer, is not implemented the same way as the physical storage area structure. You can get an idea of how the physical storage locations are structured by looking at the contents of your working directory in Windows Explorer.



Physical storage for your ProjectWise files as seen through Windows Explorer

The physical storage of the files that YOU have opened or are working on will be located under the folder named *pwise_local_electronic_plans*.



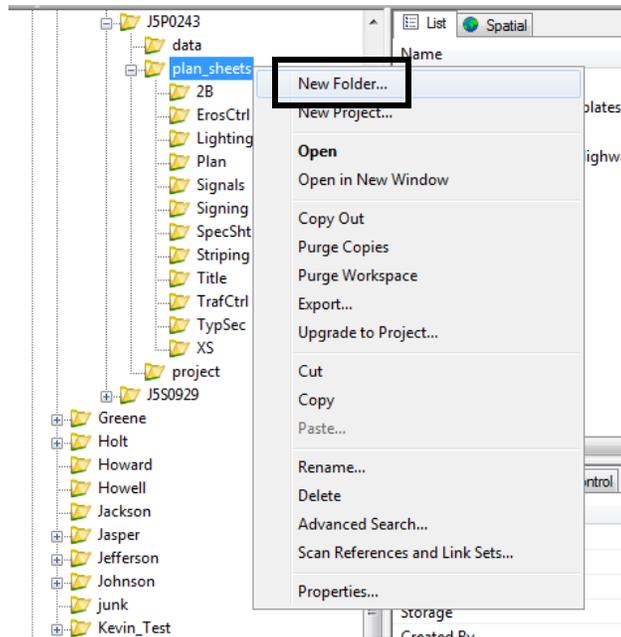
Warning: Only access the files in your working directory through **ProjectWise** otherwise you risk data loss!

NOTE: MoDOT users are able to create and rename folders in ProjectWise, given they have the proper permissions under the parent folder. Users are **NOT** able to **DELETE** or **MOVE** folders in ProjectWise though. This is due to restoration of folders on the server end. If a folder or set of folders need to be deleted or moved to another location, contact CADD Support.

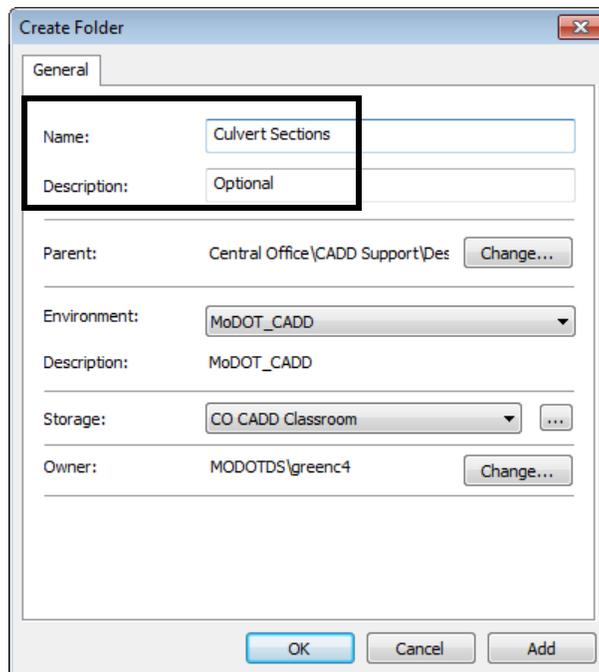
Creating Folders in ProjectWise

There are a few steps when creating a new folder in ProjectWise. Keep in mind that you must have write access to the parent folder that you are creating the new folder under.

- **Right click** over the parent folder and select **New Folder**.



- Fill out the dialog box as needed to create the folder. You should only need to fill in the **Name** and **Description** (optional) fields. The rest of the fields can be left alone. Click **OK** when finished. The new folder will inherit the same permissions as the parent folder it was created under.



Folder Properties

The properties associated with folders vary based on whether they are parent folders or subfolders, when they were created, who created them, workspace, securities, and states among many other useful items.

General tab

This tab controls folder name, description, location and ownership, as well as other properties.

Name is the name assigned to the folder.

Description allows the user to place a description of the folder in this input field.

Parent is the folder that contains this folder. If the Parent field is left blank, then the folder is at the root of the Documents folder tree in ProjectWise Explorer.

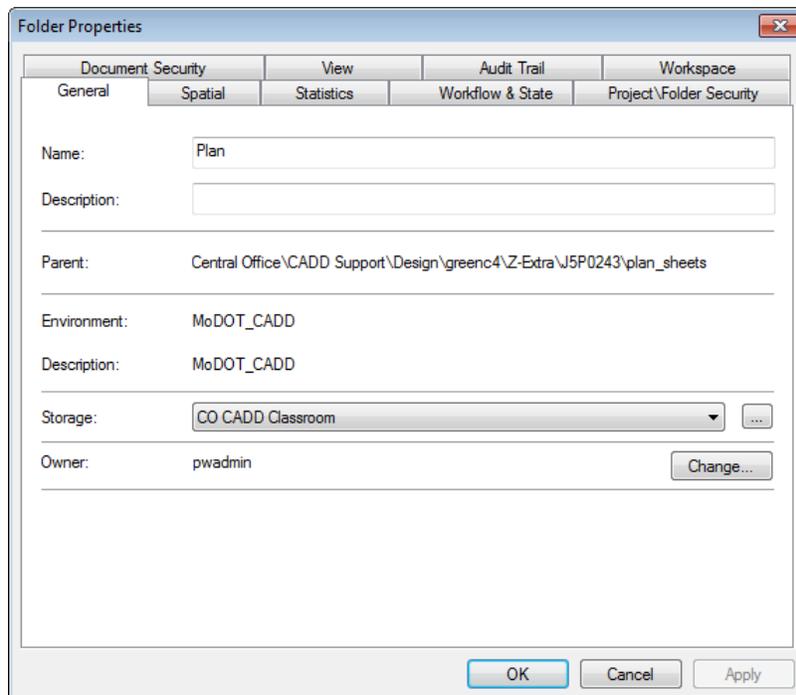
Environment is the environment assigned to the folder.

Description is the environment's description.

Storage is the default storage location for new documents created in this folder.

Owner displays the user who is considered responsible for the management of the folder. By default, the name of the user who created the folder will appear in this field.

Change will allow you to assign an owner to a folder.



Spatial tab

This tab controls what spatial data is applied to the folder, such as an aerial background map, coordinate system and source. MoDOT currently doesn't have spatial database setup for production. This may be done at a later time, if needed.

The image shows a screenshot of the "Folder Properties" dialog box, specifically the "Spatial" tab. The dialog has a title bar with a close button. Below the title bar are several tabs: "Document Security", "View", "Audit Trail", and "Workspace". Under "View", there are sub-tabs: "General", "Spatial" (which is selected), "Statistics", "Workflow & State", and "Project\Folder Security".

The "Spatial" tab contains the following elements:

- A large empty box labeled "Geometry".
- Buttons: "Edit...", "Load SLF...", and "Calculate".
- Input fields for "Lower Left": X: 0.0, Y: 0.0 and "Upper Right": X: 0.0, Y: 0.0.
- "Spatial Location" section with a "Source" dropdown menu set to "None", a "Modified" text field, and a "Coordinate System" dropdown menu.
- "Background Map" section with a dropdown menu set to "Use parent map".
- Buttons at the bottom: "OK", "Cancel", and "Apply".

Statistics tab

This tab displays creation and modification information about the folder, such as the person who created it, the date and time created, the last person to update its properties and when, and the number of documents in it, along with other information.

Created By lists the user's name that created the folder.

Created displays the date and time that the file was created.

Updated By lists the user's name that last updated the folder.

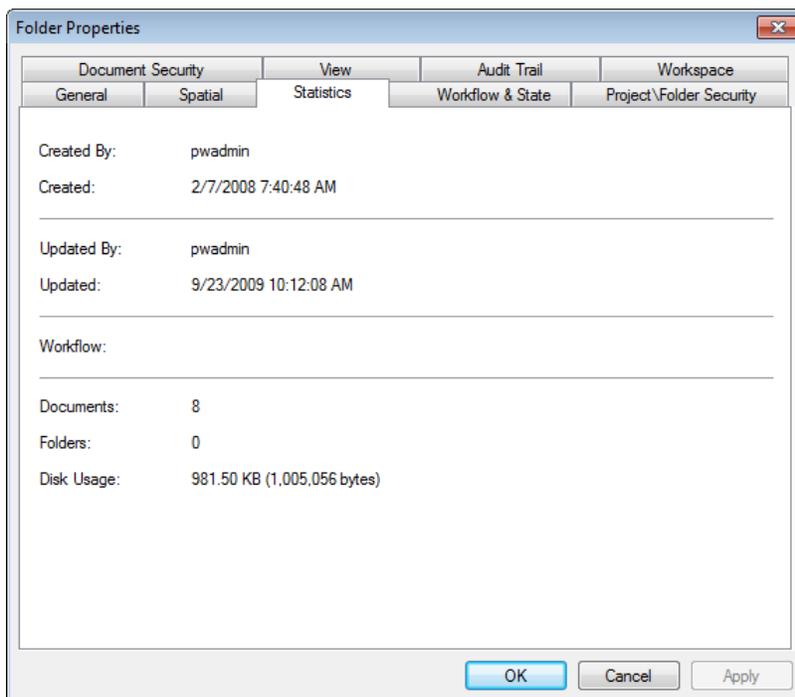
Updated displays the date and time that the file was last updated.

Workflow will display the workflow that is associated with the folder. (Currently not used at MoDOT)

Documents show the total number of documents contained in the selected folder. This does not include documents contained in the sub-folders.

Folders list the number of sub-folders contained in the selected folder.

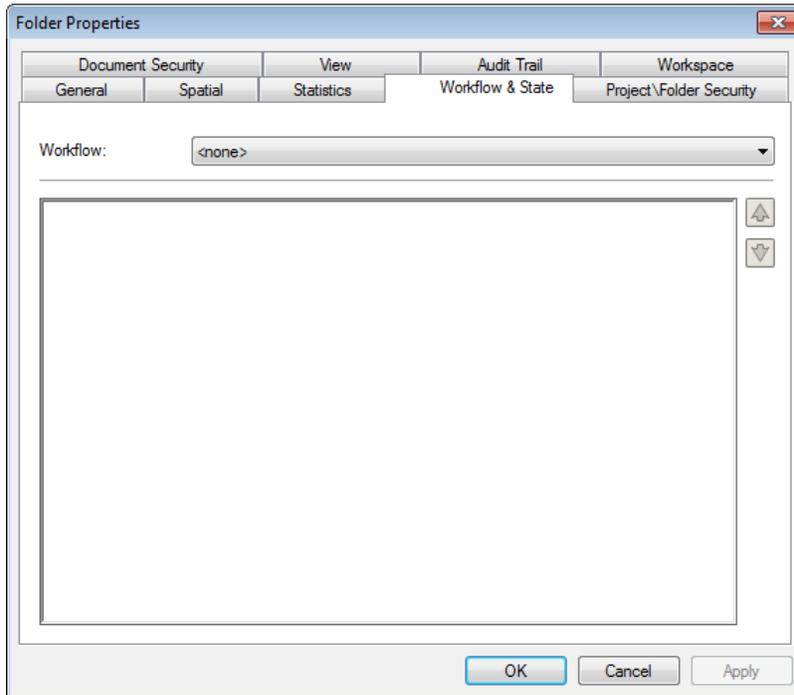
Disk Usage shows the physical size of the selected folder. This does not include documents contained in sub-folders.



Workflow and State tab

This tab contains controls to assign or modify a workflow. If you change the workflow, all the documents in the folder will be moved to the first state in that workflow.

Note: This is mainly used for the Central Office – Bidding and Review section for the final highway and bridge plans that are pdf format.



Project/Folder Security tab

This tab contains controls that set the security options on the folder. Think of Folder security when you see this tab. The controls let the users, groups, and user lists that need to have access to the folder. Users who not granted access to the folder are denied access to the folder.

Note: At MoDOT, folder security can only be assigned or modify by a ProjectWise Administrator.

Security Type shows whether security is for Folder, Workflow, or Real both folder & workflow.

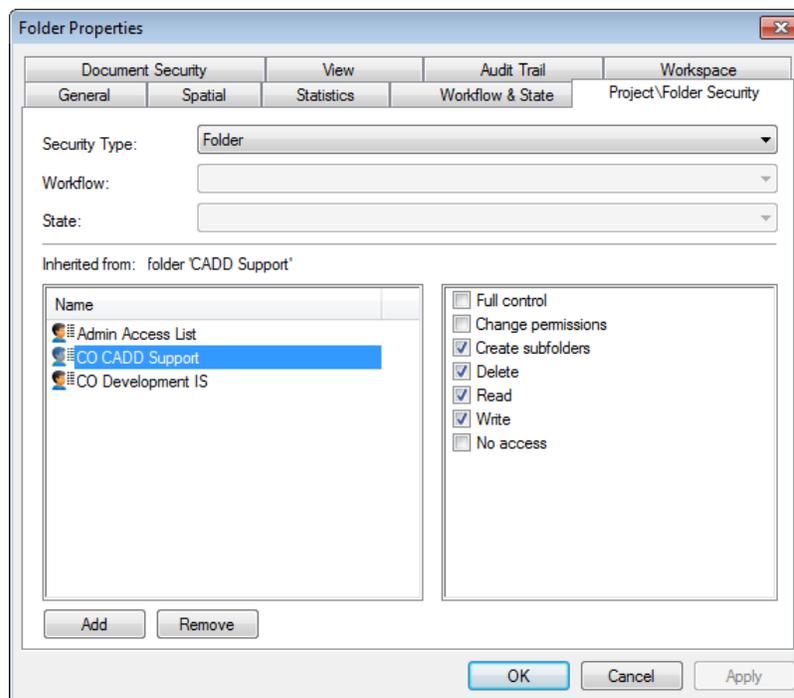
Workflow is available after changing the Security Type to Workflow or Real.

State also becomes available after changing the Security Type to Workflow or Real.

Inherited from shows the folder that the security permissions were inherited from.

The following permissions can be assigned:

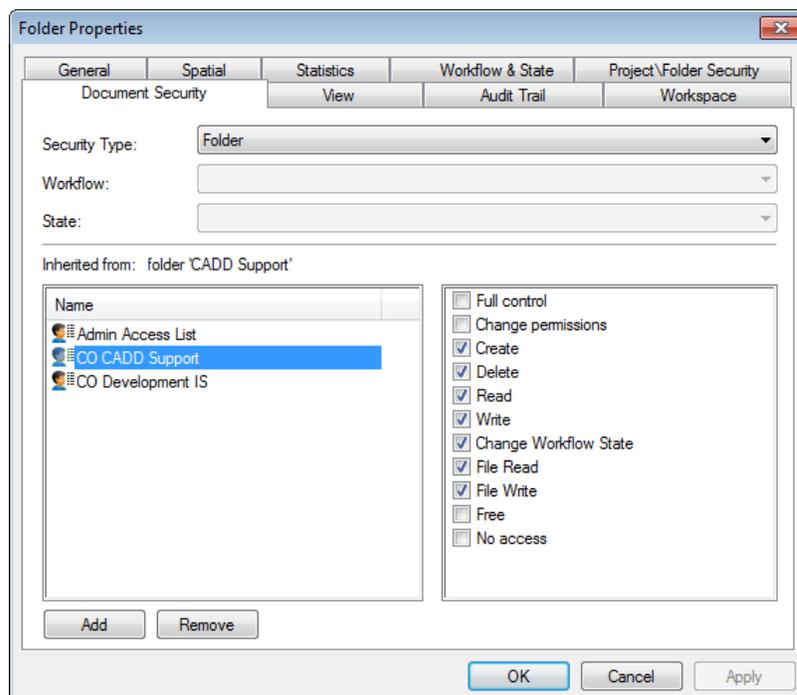
- Full control: You have total access to the folder with all editing facilities (this option will include access to future editing facilities).
- Change permissions: You can change the folder permissions.
- Create sub-folders: You can create sub-folders in this folder (in the ProjectWise Explorer Folder menu, the Create option displays).
- Delete: You can delete folders.
- Read: The folder displays in ProjectWise Explorer and you can view the folder properties (attributes).
- Write: You can modify the folder properties (attributes).
- No access: You have no access to the folder. Once this option is enabled for a user, they will not be able to see the folder in ProjectWise Explorer.



Document Security tab

This tab allows you to set the security options that apply generally to all the documents at the root of the folder.

- **Security Type — Folder** — If selected, the Workflow and State lists are disabled. The list shows the folder's own Security Objects or security inherited from the Object Security hierarchy.
- **Security Type — Workflow** — If selected, the Workflow and State lists become active. The Workflow list displays all the available workflows in the datasource. Selecting a workflow from the list assigns permissions to that folder, which become active when the folder is placed in the selected workflow. The State list displays all the available states within the selected workflow. Selecting a state from the list assigns permissions to that folder, which become active when the folder is placed in the selected state within the workflow.
- **Security Type — Real (Workflow & Folder)** — If selected, the Workflow and State lists become active. This option displays the combination of permissions from both the Folder and Workflow, therefore the selected user's permissions cannot be changed when this option is selected.
- **Workflow** — When Security Type is set to Workflow or Real (Workflow & Folder), this list displays all available workflows in the datasource.
- **State** — When Security Type is set to Workflow or Real (Workflow & Folder), this list displays all states in the workflow selected in the Workflow list.
- **Inherited from** — Displays the name of the item the documents in the folder inherit their rights from. The items can be global datasource, environment, workflow or workflow state. For example, in ProjectWise Administrator, if users are added to folder security at the datasource level, these are displayed in the User, Group, User List window (untitled) in the security tab page when creating a new folder.
-

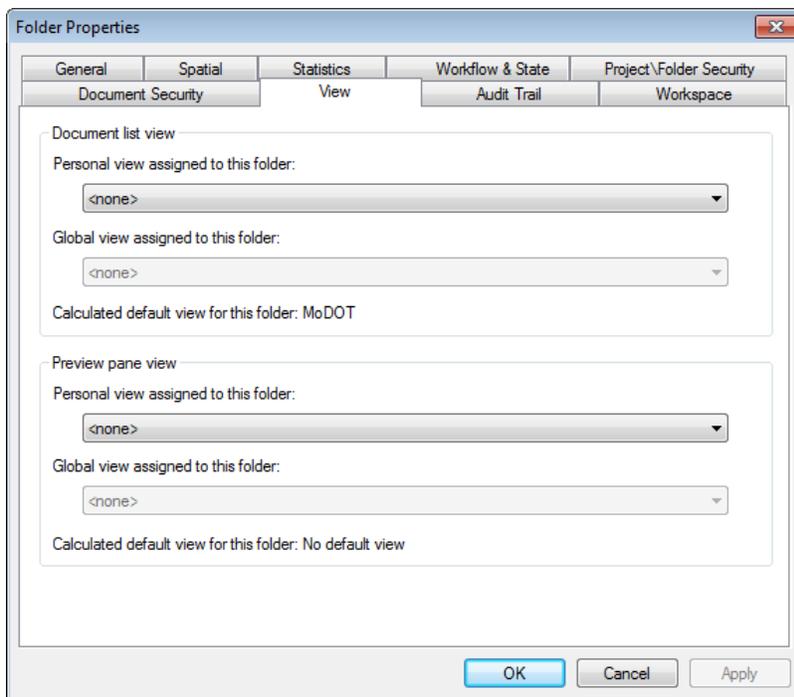


View tab

The tab lets you assign personal and global views to this folder or project. For complete information, see *“Using Views To Display The Properties You Want”* under the ProjectWise help.

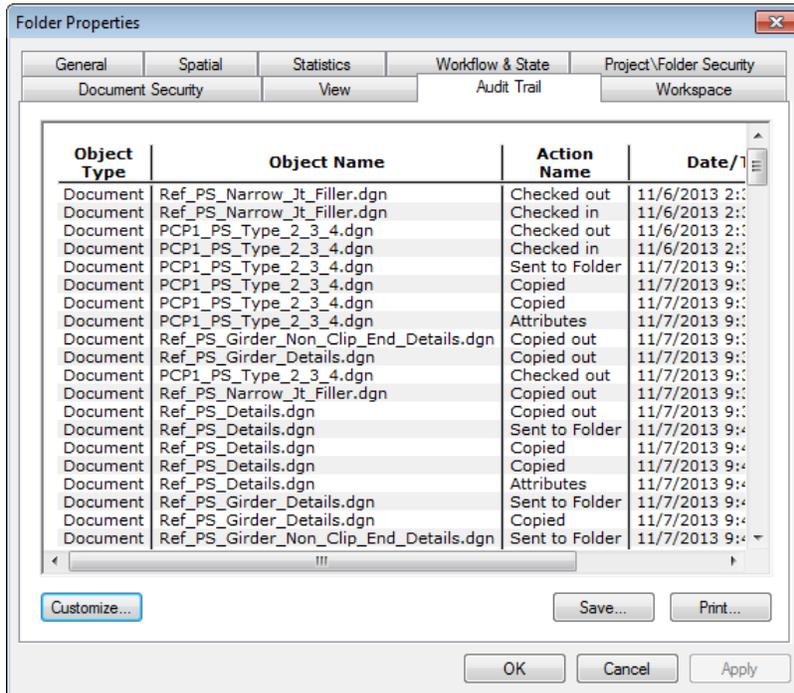
Document list view - In this section you can define which view will be applied to the document list in the documents window when this folder or project is selected. When both a personal view and a global view are assigned in this section, then that personal view will be applied. When neither a personal view nor a global view is assigned in this section, then whatever is set as the default view for the document list for all folders and projects in the datasource is applied.

Preview pane view - In this section you can define which view to apply to the preview pane in the documents window when this folder or project is selected. When both a personal view and a global view are assigned in this section, then that personal view will be applied. When neither a personal view nor a global view is assigned in this section, then whatever is set as the default view for the preview pane for all folders and projects in the datasource is applied.



Audit Trail tab

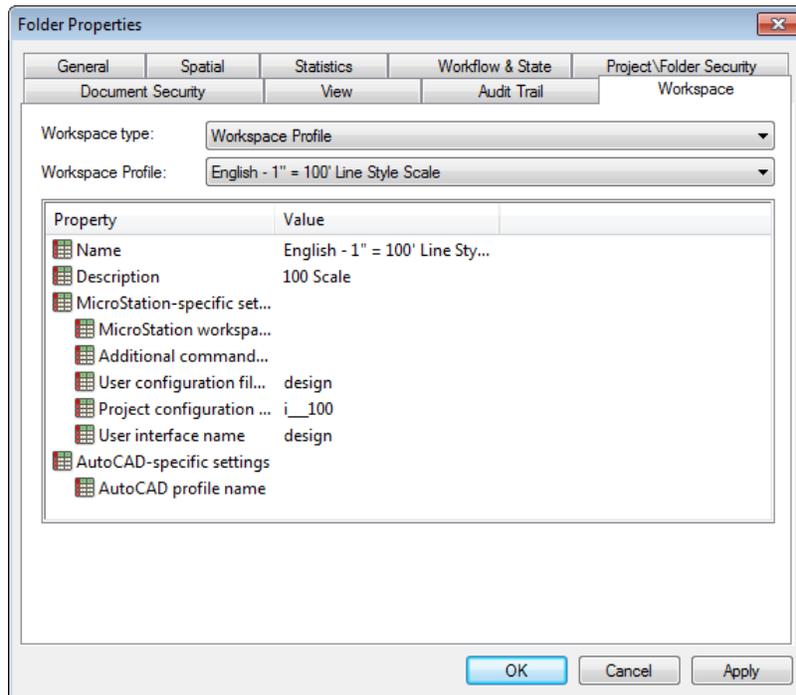
This tab will allow you to view that activity under the folder for the last 3 months. Any activity past 3 months is removed from the database.



Workspace tab

This tab lets you assign a (unmanaged) workspace profile or various managed workspace settings to the folder or project.

- **Workspace type** - Sets the Workspace type as created by the ProjectWise Administrator
- **Workspace Profile** - Lists the MicroStation profiles that can be assigned to the folder so all MicroStation files under the folder will open correctly.



Copying a folder structure to another folder

If you create a folder structure you want to reuse, you can copy and paste the structure to create new folders.

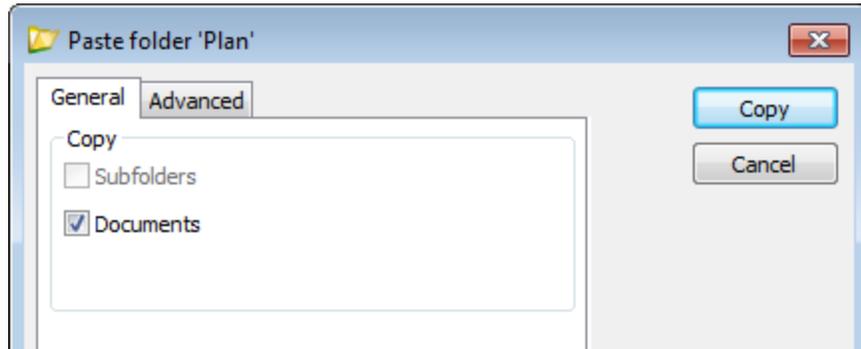
You can drag a folder with the folder structure that you would like to copy to another folder.

Paste folder dialog

The paste folder dialog allows the user to choose options to copy subfolders and copy documents under the General tab. This will also allow the user to change options in the Advanced tab.

General tab

- **Subfolders** - When on, let's you copy the selected source folder and its subfolders into the destination folder. If off, you can only copy the contents of the selected source folder and its folders, but not the folders themselves, into the destination folder.
- **Documents** - When on, let's you copy documents from the source folder into the destination folder. If 'Copy Subfolders' is also on, documents are copied along with their folder into the destination folder.



Advanced tab

- **Copy set references** - When on, set relationships are kept between any master documents included in the copy and their references. If any of a master document's references are in a folder included in the copy, then the new copy of the master document is linked to the new copies of the reference documents. If any of a master document's references are in a folder not included in the copy, then the new copy of the master document remains linked to the original (uncopied) reference documents. When 'Copy set references' is off, any master documents in the selected source folder will no longer be master documents when copied into the destination folder.
- **Copy attributes** - When on, document attributes are copied. If both Copy documents and Copy set references are not turned on, this option is grayed out and unavailable.
- **Copy versions (without reference sets)** - When on, versions are copied into the destination folder; however, if any of the versions are master documents of logical sets, the versions will no longer be master documents.
- **Copy folder workflow** - When on, the selected source folder's workflow is retained in the new copy of the folder. If off, the newly copied folder inherits the workflow of its new parent folder.
- **Copy access control** - When on, the selected source folder's security settings are retained in the new copy of the folder. If off, the newly copied folder inherits the security settings of its new parent folder.
- **Copy workspace profiles** - When on, the selected source folder's workspace settings are retained in the new copy of the folder. If off, the newly copied folder inherits the workspace settings of its new parent folder.
- **Take ownership** - When on, the user performing the copy becomes the owner of the newly copied folder. If off, the user who is the owner of the selected source folder will also be the owner the newly copied folder.

- **Copy saved searches** - When on, any saved searches in the copied project are retained in the new copy of the project.
- **Copy resources** - When on, the resources currently set for the copied project remain the same in the new copy of the project.
- **Update GUI on each operation** - When on, the ProjectWise Explorer window updates after each copy. If off, the ProjectWise Explorer window updates once after all copies are completed.

