

# HDR ProjectWise Quick Reference

## Login

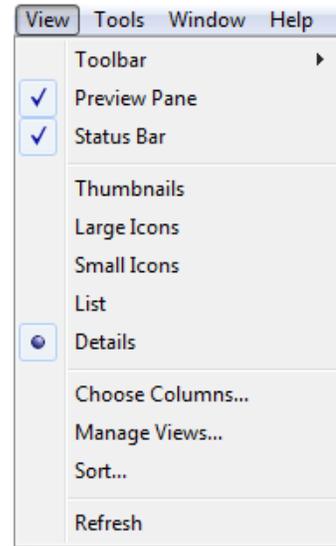
1. Click on the ProjectWise Explorer icon.
2. Click on the “+” sign to the left of the datasource where your project files reside.
3. Connection Client login required for single sign on. You can use user ID and password, same as your network password. You are authenticated when you logon to the HDR network.

## Customizing your View

1. Go to “View” and then “Manage Views”. Select “New”, give your view a name.
2. Expand “Basic Columns”, choose your columns.
3. If you want this new view to be the default, select the “Set Defaults” tab and a check mark to Document List View for the Datasource and click “OK”.
4. Go under “View” and choose “Details” to turn on the columns you set up.
5. You can move columns by dragging and dropping them in the order you want them.
6. Views can be changed at any time. You can create multiple views and they will be listed in the “View” drop-down list.

## Creating a new non-CAD file

1. Create a new non-CAD file in its native application.
2. Save it to your desktop.
3. Drag the file from your desktop and drop it in ProjectWise.
4. *Delete the original file from your Desktop.* (Do this immediately so you do not mistakenly work on this file. The current file is now the one that resides in ProjectWise.)



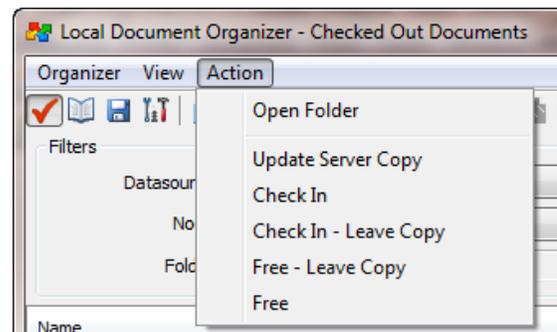
## Managing your Files with the Local Document Organizer

The easiest way to manage multiple files that you have checked out or exported is with the Organizer.

Click on the Local Document Organizer icon on the toolbar, which is the 5<sup>th</sup> image from the left. 

The Organizer will initially have the red check mark depressed and show you all the files you have checked out.

Click on the floppy disk icon to display the files you have exported.



Manage your checked out and exported files by highlighting them, clicking on “Action” and choosing what you want to do with the file(s).

**Icons which indicate a document's permission and status**

Icon	Name	Description
	Pencil	Read/Write access.
	Open Book	Read-Only access (either because access control is set to read-only or because the document is an older version).
	Lock	Document is currently checked out or has been exported by another user.
	Red Check Mark	Document is checked out by you.
	Exported	Document has been exported by you.
	Final	Document is locked in Final Status.



## Commonly used tasks on the right-click menu for files

New	<b>New</b> – use for creating new documents, versions.
<b>Open</b>	<b>Open</b> – use only for editing files (same as double clicking on file’s icon).
Open as Read-Only	<b>Open as Read-Only</b> –use for viewing or printing (If you need to look at the file but you do not need to edit it, use this command.)
Open With...	<b>Open With</b> – use if you need to direct ProjectWise to open with a specific application.
Markup	<b>View</b> – view over 200 non-CAD file types with ProjectWise viewer.
View	<b>Check Out</b> – downloads to your workstation for editing.
Check Out	<b>Shared Check Out</b> – MicroStation XM shareable DGN check out.
Check In	<b>Check In</b> – returns file from your workstation to the server.
Free	<b>Free</b> – releases checked-out files; <b>Warning:</b> edits are not saved to the server! (Think of it as an “undo” or “disregard changes” command.) You may find freed files in Recycle bin.
Copy Out	<b>Copy Out</b> –downloads a copy to your working directory; allows others to check out and edit. This command is rarely, if ever, used.
Export...	<b>Export</b> – checks the file out to a user-specified folder on your PC or on the network. Use any time you need to work on a file away from the HDR network.
Import	<b>Use Export rather than working in the DMS folders!</b>
Export Dependency Map(s)...	<b>Import</b> – imports the exported file.
Import Dependency Map(s)...	<b>Update Server Copy</b> – updates copy in ProjectWise. Use when you want to keep a file out and continue working on it, but you need to get your revisions onto the server.
Update Server Copy	<b>Refresh Local Copy</b> – overwrites local copy with server version (Rarely used)
Refresh Local Copy	<b>Purge Local Copy</b> – removes selected files from local PC (cache) that have been copied
Purge Local Copy	<b>Purge Workspace</b> – purges the managed CAD workspace.
Purge Workspace	<b>Cut</b> – Used with Paste function to move document.
Cut	<b>Copy</b> – copy within ProjectWise. You can also drag and drop, which may be easier.
Copy	<b>Move To</b> – move within ProjectWise. You can also drag with a right-click and select “move”.
Paste...	<b>Rename</b> – dialog opens for filename, name, and description. As a best practice you may want to keep all the same.
Copy To...	<b>Delete</b> – the audit trail will show when a file was deleted and by whom
Move To...	<b>Modify</b> – used to change the value of a selected attribute simultaneously in several documents and in several folders and subfolders. Documents can be selected either from the Document window or as a result of a search.
Rename...	<b>Add Comment</b> – provides the ability to add a comment to the file audit trail.
Delete	<b>Set</b> – reference information
Modify...	<b>Send To</b> – send to a printer or to an e-mail recipient
Add Comment	<b>Copy List To</b> – copy a list of files to paste elsewhere. Good way to quickly generate a drawing list in Excel.
Set	<b>Attributes</b> – Used to copy and paste environment attributes between files.
Send To	<b>Change State</b> – use for workflow and to put a file into final status. Final status will show a “tag” indicating file is locked to changes. To remove a final tag, call the Help Desk.
Copy List To	<b>Properties</b> – allows you to see all the file properties, including the audit trail. Another way to get to the file properties is to highlight the file name in ProjectWise and then press the space bar.
Attributes	
Change State	
Properties...	

## Support

HDR ITG Help Desk

Phone: 1-800-776-8007 Email: [HDRITGHelpDesk@hdrinc.com](mailto:HDRITGHelpDesk@hdrinc.com)