

CDOT Workflow PW 9 - Exporting Files for Use in the Field

This workflow describes the procedures for working with electronic data files stored in ProjectWise while not connected to the network.

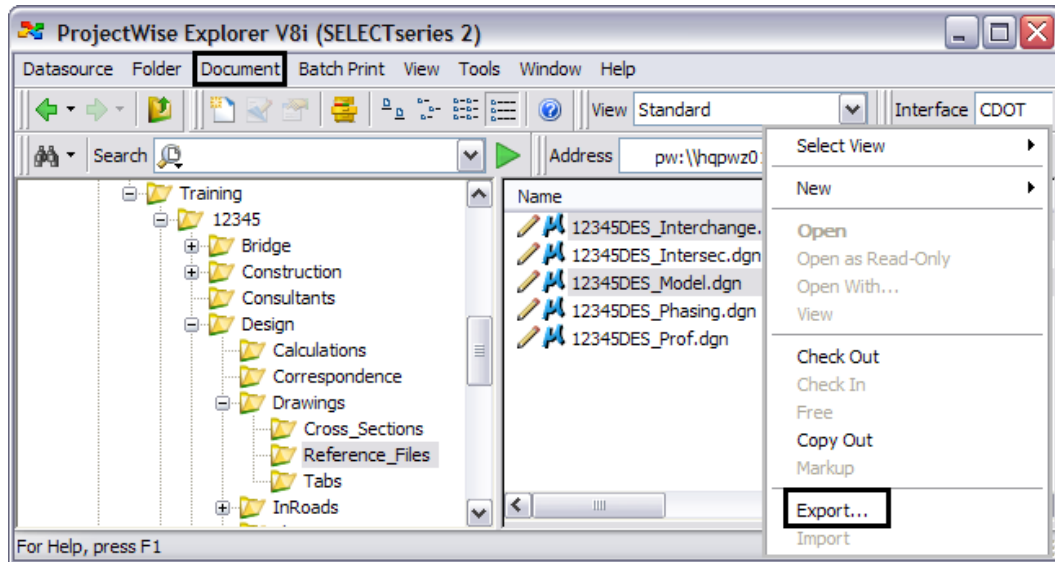
Exporting Documents

Exported documents are used to:

- Update project documents on a mobile computer while traveling
- Share files with CDOT groups don't have access to ProjectWise
- Share files with organizations such as consultants or other state agencies that don't have access to CDOT's ProjectWise environment

To export a document:

1. Select the documents to be exported from the ProjectWise Explorer window then click on **Export...** from the **Document** menu. You can also right click on the document and select **Export...** from the right click menu. This displays the **Document Export Wizard**.



Note: Files that are currently checked out cannot be exported.

2. In the **Document Export Wizard** Dialog box, click on the **Next >** button. This displays the **Define the export settings** pane.



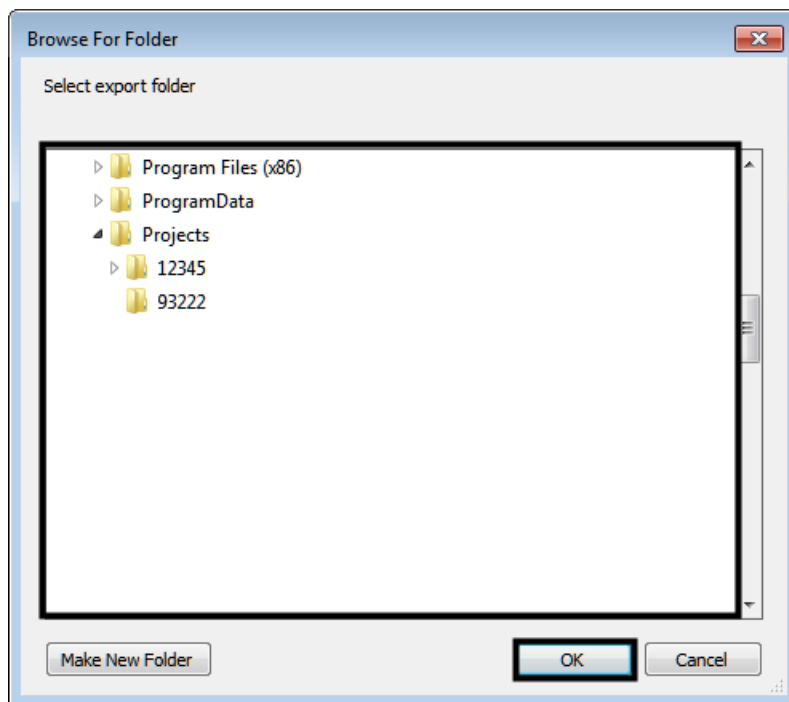
In the **Choose an action to perform** area, there are two options.

- **Export** – Use this option to edit a file. This creates a copy of the selected items on the user’s computer and locks the ProjectWise copy so that no one else can edit the file. There is a link between the exported copy and the ProjectWise copy so that the exported file(s) can be returned to ProjectWise after editing without creating a new version of the data.
- **Send to Folder** - Use this option to make a copy of a file that can be renamed and saved as a new file. This creates a copy of the selected items on the user’s computer, but does not lock the ProjectWise copy. There is no link between the exported copy and the ProjectWise copy. If the exported file is returned to ProjectWise, then a new version of the file will be created.

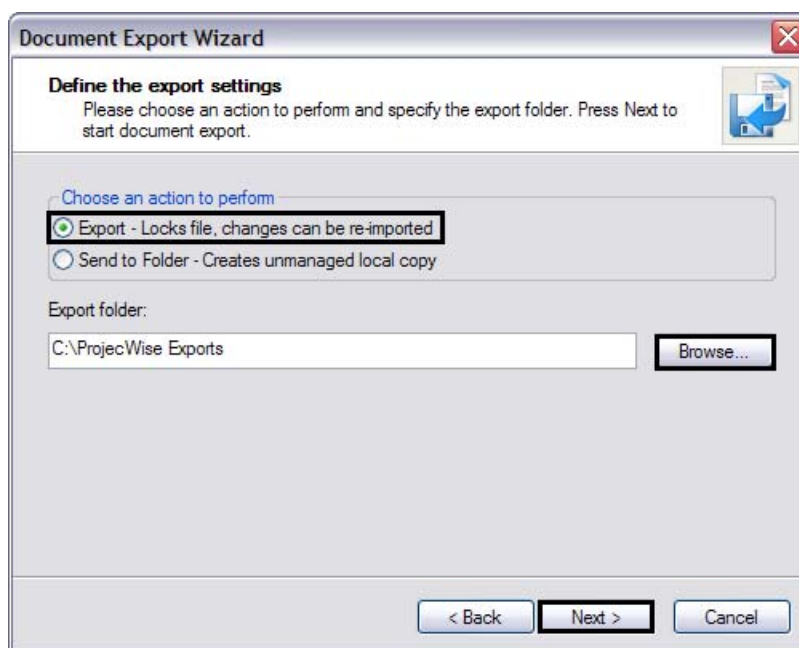
If the file is to be edited and returned to ProjectWise, use the Export option. This will ensure that unwanted versions of a document are not created and will prevent work done by others from being overwritten accidentally. If the file is to be used to create a new document, use the Send to Folder option. This will prevent the file from being accidentally modified.

3. Select the **Export** option. This will lock the files so that no changes can be made to the ProjectWise copy while the file is exported.
4. Click on the **Browse** button to select the destination folder for the selected items. This displays the **Browse For Folder** dialog box.

5. In the **Browse For Folder** dialog box, navigate to the desired location on the local computer for the exported file.

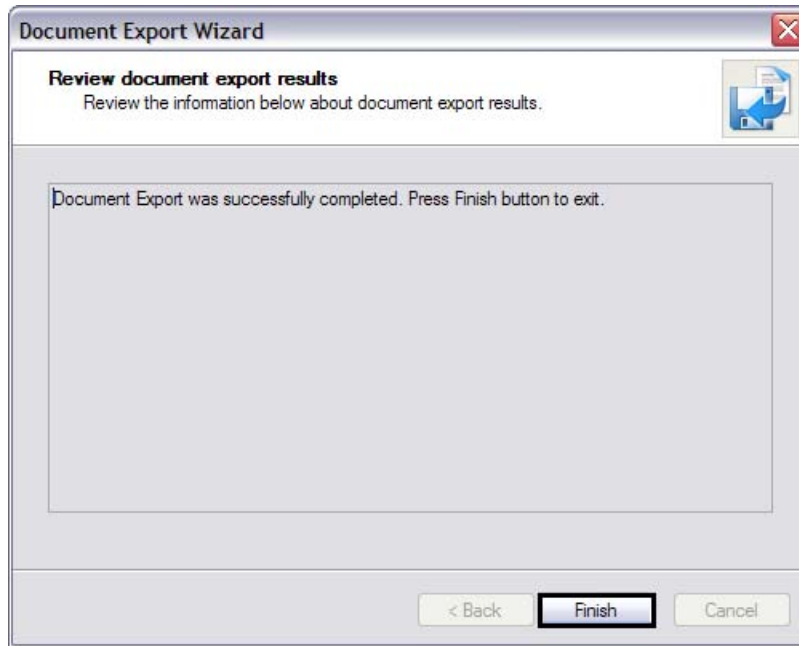



6. If a new folder is desired, navigate to the location for the folder then click the **Make New Folder** button. Key in the name for the new folder.
7. Click the **OK** button. This dismisses the **Browse For Folder** dialog box and displays the file path in the Browse field.
8. In the **Define the export settings** pane, click on the **Next** button.



A status window is displayed showing the progress of each file being exported. The process is complete when the **Review document export results** screen appears.

9. Click on the **Finish** button.



Once the export is complete the status icon for the documents will change to  and the status of the document is changed to Exported. The files can now be edited without a network connection.

Note: If the exported document is a MicroStation drawing that has reference files attached, the references will also be copied to the export folder. However, the **Status** of the reference files *will not be changed to Exported* and the reference file will be available for **Check Out** by other users.

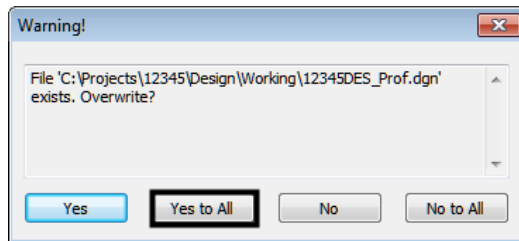
Exporting Reference Files

If the referenced files are to be edited, then they must be exported. To export the reference files:

1. Repeat steps 1 through 8 (as described above). This displays a **Warning** message box stating that a file on local computer is about to be overwritten.

The local file is the unmanaged copy created by the first export. Overwriting that file with the managed copy (being exported now) will maintain the reference file relationship and allow editing done to the reference file to be written back to ProjectWise.

2. In the **Warning** message box, Click the **Yes to All** button. This replaces the unmanaged copy of the file(s) with a managed copy.



3. Click on the **Finish** button.

Importing Documents

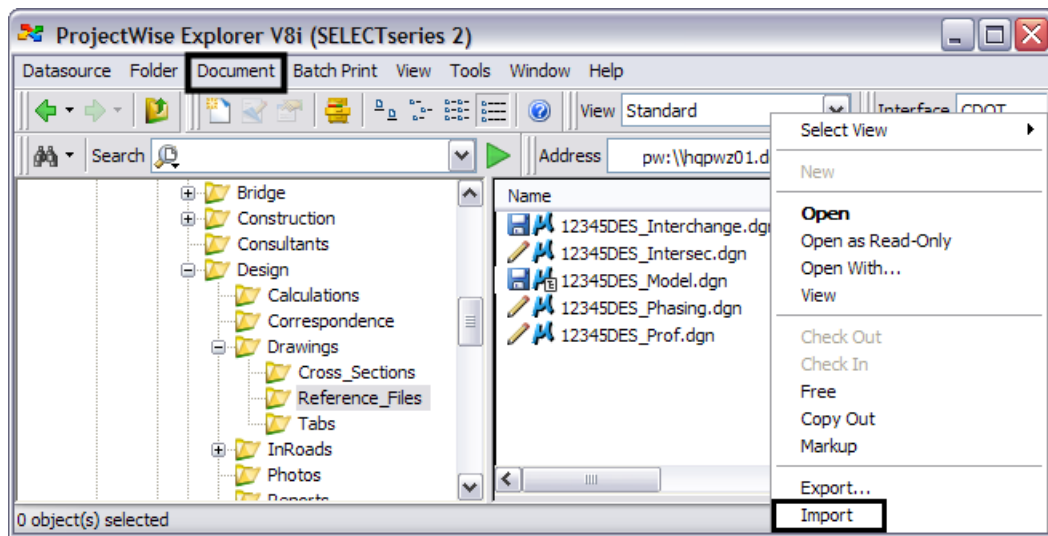
ProjectWise remembers the location that the files were exported to. When documents are returned to ProjectWise, they must be in the same location and have the same name as when they were exported.

Importing files (returning exported file to ProjectWise) can be accomplished in two ways, by right clicking on the file or by using the Local Document Organizer. The method used will depend on the number and location of the files to be returned to ProjectWise.

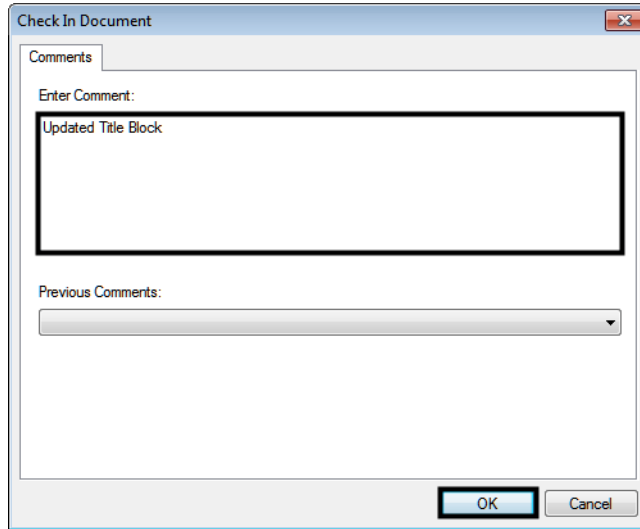
Use the right click method for a single file or multiple files that are in the same folder in ProjectWise. Use the Local Document Organizer if there are multiple files in different folders in ProjectWise.

The Right Click Method

1. Highlight the documents to be imported from the ProjectWise Explorer window then right click on a document and click on **Import...** from the list. Selecting **Document > Import...** from the ProjectWise menu can also be used.



4. The **Check In Document** dialog box is displayed. Enter a comment reflecting the changes that have been made and click **OK**.



A status window is displayed showing the progress of each file being imported. When the status window disappears, the file transfer is complete and the ProjectWise file is unlocked.

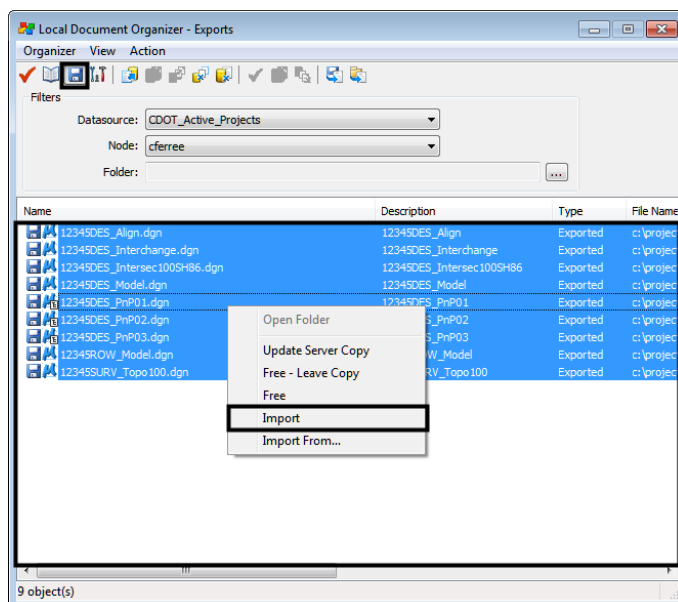
Local Document Organizer Method

5. Click on the **Local Document Organizer** icon from the Standard toolbar. This displays the **Local Document Organizer** dialog box.



6. In the **Local Document Organizer** dialog box, click on the Exported icon.
7. Highlight the files to be imported.

- Right click in the list and select Import from the right click menu.



This updates the files on ProjectWise and deletes the copies from the computer. The files on ProjectWise are now available for anyone to edit.

Updating Files on ProjectWise while Keeping the Files Checked Out

While files are exported others may need to look at the files in the Read Only mode. To get the most out of the information they need to see the most up to date data. Also, updating the data in ProjectWise creates a backup in case something should happen to the computer or the local copy of the data. The ProjectWise tool, Update Server Copy, allows the ProjectWise file to be updated while keeping it checked out and the exported file ready for additional edits.

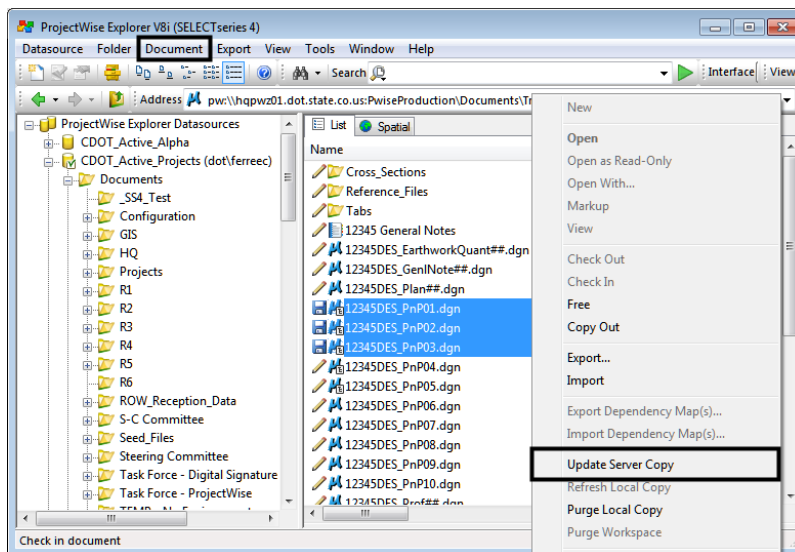
Updating the ProjectWise files can be accomplished in two ways, by right clicking on the file or by using the Local Document Organizer. The method used will depend on the number and location of the files to be updated.

Use the right click method for a single file or multiple files that are in the same folder in ProjectWise. Use the Local Document Organizer if there are multiple files in different folders in ProjectWise.

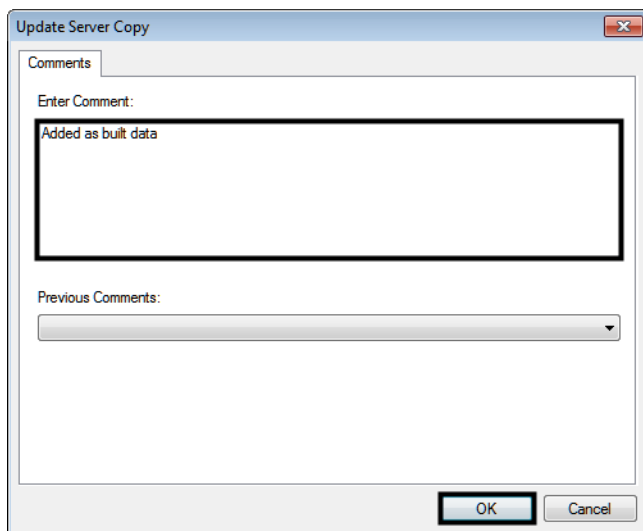
Note – A network connection is required for this procedure. To access ProjectWise from a network other than CDOT's refer to the section: *Accessing ProjectWise from a WiFi Network* below.

To update the ProjectWise file without importing the local file:

1. Highlight the documents to be updated from the ProjectWise Explorer window then right click on a document and click on **Update Server Copy...** from the list. Selecting **Document > Update Server Copy...** from the ProjectWise menu can also be used. This displays the *Update Server Copy* dialog box.

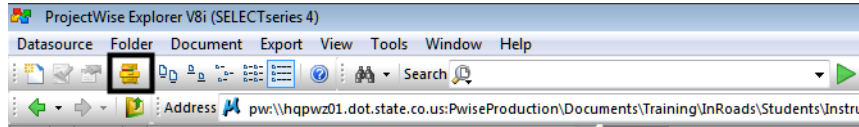


2. In the *Update Server Copy* dialog box, key in comments as desired.
3. Click the **OK** button. A status window is displayed showing the progress of each file being updated. When the status window disappears, the file transfer is complete.

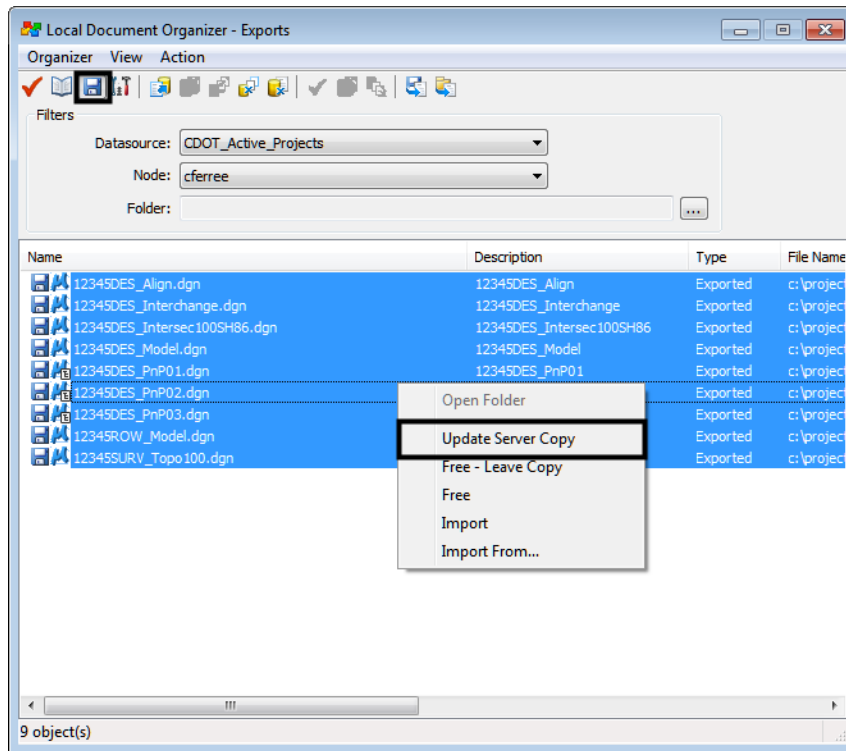


Local Document Organizer Method

- Click on the Local Document Organizer icon from the Standard toolbar. This displays the **Local Document Organizer** dialog box.

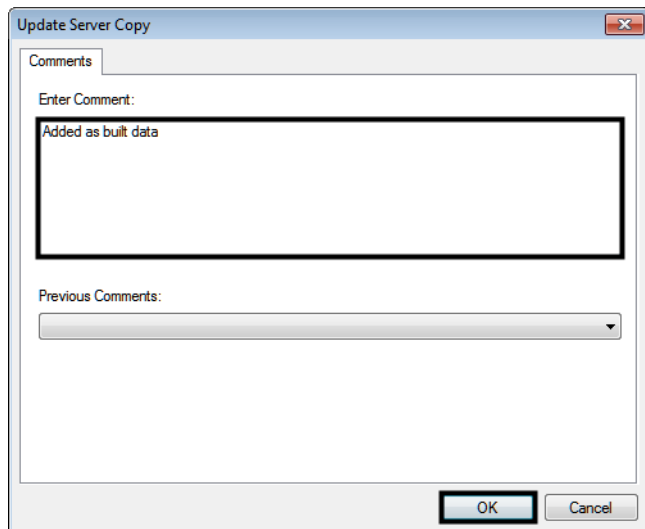


- In the **Local Document Organizer** dialog box, click on the Exported icon.
- Highlight the files to be updated.
- Right click in the list and select **Update Server Copy** from the right click menu.



- In the **Update Server Copy** dialog box, key in comments as desired.

9. Click the **Ok** button. A status window is displayed showing the progress of each file being updated. When the status window disappears, the file transfer is complete.



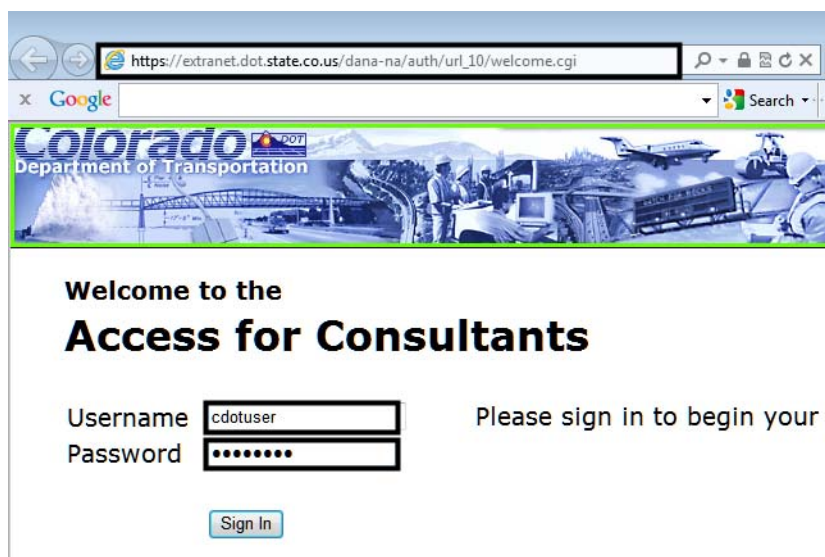
Accessing ProjectWise from a WiFi Network

ProjectWise can be accessed from a non-CDOT network. This access is gained by using the CDOT VPN. To log in to the CDOT VPN:

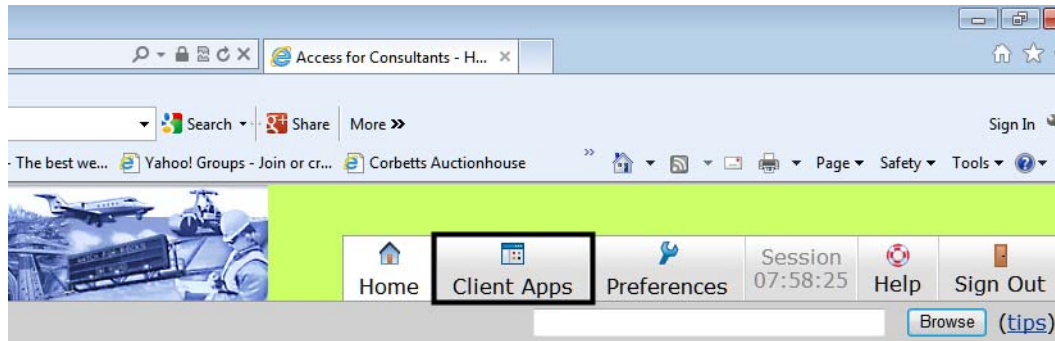
1. Open an Internet Explorer window.
2. Navigate to:

https://extranet.dot.state.co.us/dana-na/auth/url_10/welcome.cgi

3. Log in to the site using a valid CDOT username and password.



4. Select the **Client Apps** button. This displays the **Client Application Sessions** page.



5. On the **Client Application Sessions** page, select the **Start** button for the **Windows Secure Application Manager**.
6. If any set up dialog boxes are displayed that require a response, select the **Yes** or **OK** options.
7. When the connection is complete, the icon below is displayed on the task bar.



8. The Internet Explorer window can now be closed, but do not sign out, or the VPN session will be terminated.

With VPN access, ProjectWise can be used in the same manner as if connected to the network in a CDOT office.

To exit the VPN session:

9. Right click on the VPN icon and select **Sign Out** from the menu. This closes the VPN access and all access to ProjectWise.

