Document Properties and Attributes

Viewing Document Properties and Populating Attributes

In general, a document properties is information about the document that is automatically populates and can't be entered manually. There are some exceptions to this definition but it helps to understand how ProjectWise works if you think of properties in this way.

ProjectWise attributes on the other hand are extra custom data fields generally used to store project specific data for each document. Unlike document properties that get populate automatically as documents are created and modified, attribute information must be entered manually by the end user.

A video explaining how to view and modify document properties and attributes has been created as a resource to learn about this important ProjectWise concept. The video Document Properties can be accessed through this link and is also found on the CADD & Engineering website. Additional information taught on this video include:

♦ What information is available on the *General* and *Attributes* tabs of the *Properties...* dialog box

♦ The importance of setting the *Project Code* attribute

♦ Illustration of filling in additional attributes

Changing Attributes on Multiple Files

If you have many project files that need to be populated with the same attributes, use the Modify... tool to assign those attributes all at one time. The video **Changing Attributes for Multiple Files** illustrates an effective way of using this tool.

Important! This video was created prior to the release of ProjectWise V8i. Be aware that the *Find* command noted in the video has been replaced with *Advanced Search...*

Versioning

One of the advantages of using ProjectWise to manage project documents is the ability to store a document in a central location and to minimize the number of copies of the document stored on local machines, network drives or floating around in a vast array of e-mails. However, there will most likely be a time that a new concept will come up and a document will need to undergo a drastic change.

Versioning is a perfect solution for this situation. It is like taking a snapshot of the document right before a major change so that if necessary, the new document can be compared to the original or the old version can be restored.

The version of document can be a combination of numbers and characters so that it has meaning other than just one version being newer than another. Project teams will need to determine the standard versioning sequence for their project.

The version of a document is considered a document property but is an exception to the rule of being unchangeable by the user. To change the version of a document:

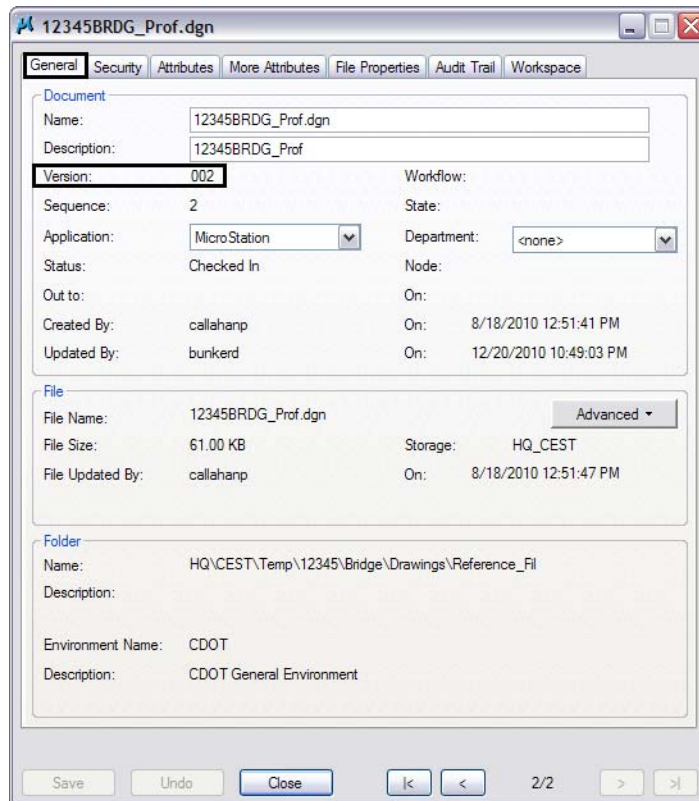1. Right click on a file and choose New > Version from the menu.
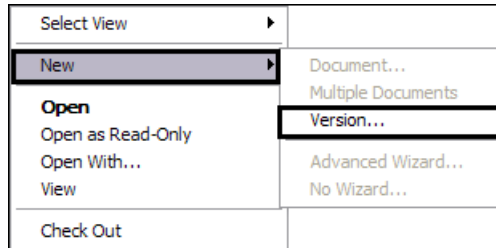
2. On the *Version* tab, key in the new version sequence.

3. Enter any helpful information to identify why the version was created on the *Comment* tab.

4. Click the **OK** button.
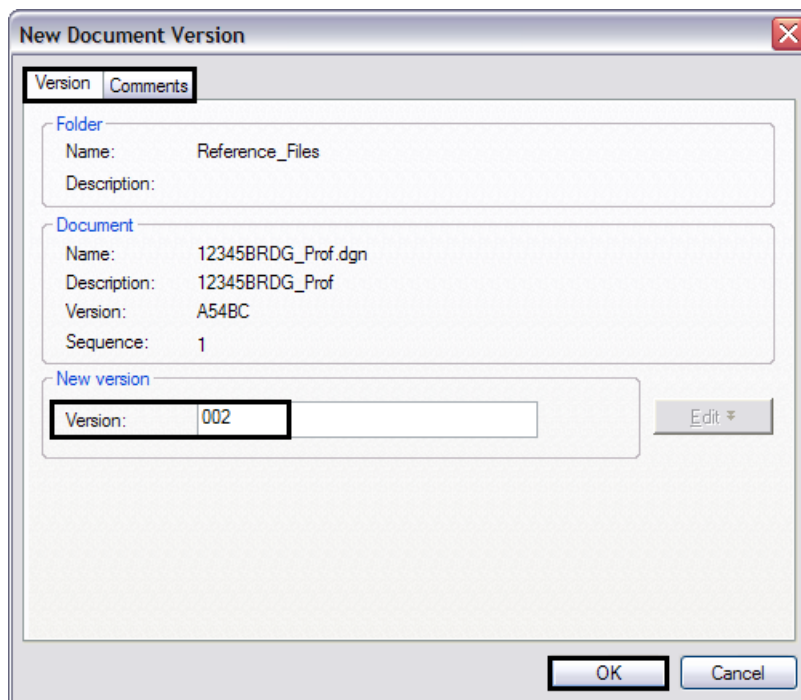
5. To verify the new version, click on the *General* tab of the *Properties...* dialog box and note the version number near the top left part of the screen.

6. Click **Close**.

Document Permissions

In order to have access (read only or read/write) to a document, permissions must first be granted at the folder level. See the chapter *Working with Folders in ProjectWise* for details on folder permissions. If you are the owner of a document, you will be able to change the permissions to the document. Otherwise, permissions will be administered by the Data Managers.
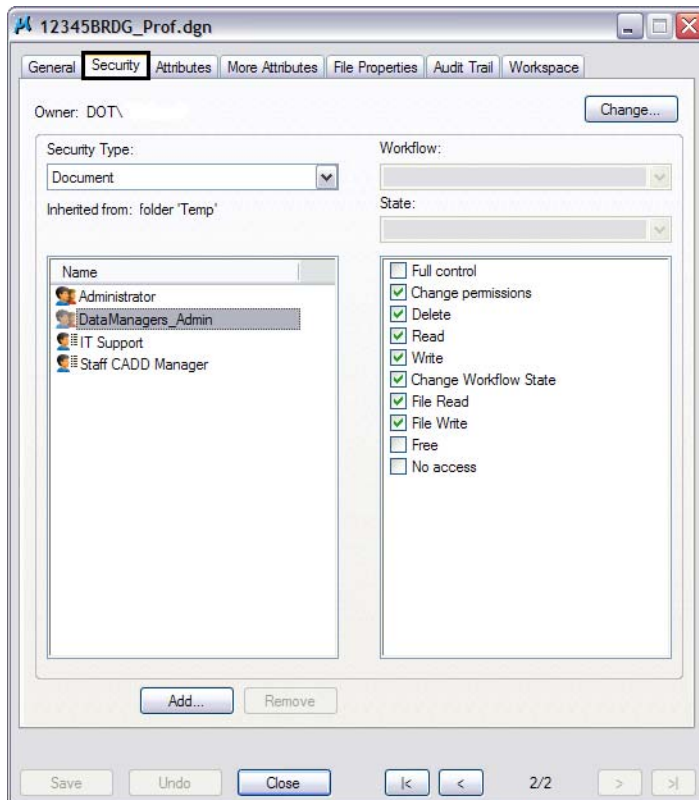
Audit Trail

An audit trail is created for each document stored in ProjectWise. You can use the audit trail to review historical information about the document including when it was created, copied out, checked out, and checked in. These are called actions. ProjectWise records the date, time, and user name of the person performing those action along with any comments that were entered by the user.

The video **Create, Copy, and Delete Documents** illustrates how to use the audit trail.