

APPENDIX 6 – USING THE LOCAL DOCUMENT ORGANIZER

Local Document Organizer

Local Document Organizer is used to list and manage the documents that you currently have checked out, copied out, or exported, and also any related workspace documents that have been copied out as a result of a check out, copy out, or export. You can filter the list of documents displayed by datasource (if you are logged into more than one datasource) or by a specific folder or project in a specific datasource.

The administrator can additionally filter the list by user, to see what documents a specific user, or all users, has checked out, copied out, or exported from the specified datasource.

You can also configure Local Document Organizer to open automatically when you log out of a datasource in which you still have documents checked out.

The following procedures assume that your user setting, *Document - Free*, is on. If this setting is off, you cannot free checked out or exported documents.

Open Local Organizer

Select **Tools > Local Document Organizer**.

Configure Local Organizer to Open When Logging Out

You can set the Local Document Organizer defaults to automatically open when you log out of ProjectWise.

Use the following procedure in order to configure the setting for the Local Document Organizer:

Step	Action
1	Select Tools > Options .
2	Select the Settings tab on the User Properties dialog.
3	Expand the User Interface category, then expand the setting, <i>Show Local Document Organizer on log out</i> .
4	Do one of the following:

Step	Action
	Turn on <i>Show always</i>, if you want Local Document Organizer to open whenever you log out of a datasource, whether you are in ProjectWise Explorer or an integrated application. Turn on <i>Show in ProjectWise Explorer only</i>, if you only want Local Document Organizer to open whenever you log out of a datasource from ProjectWise Explorer.
5	Click OK .

Use the Local Organizer to See a List of Documents You Currently Have Checked Out, Copied Out or Exported

1. Open Local Document Organizer (Tools > Local Document Organizer).
2. Select a datasource.
3. Do one of the following:

To see what documents you currently have checked out, select **View > Checked Out Documents**, or click the Checked Out Documents icon. All documents you have checked out display in the list.

To see what documents are currently copied out to your working directory, select **View > Copied Out Documents**, or click the Copied Out Documents icon. All documents you have either expressly copied out, or those that have been copied out as a result of other check outs or copy outs display in the list.

To see what documents you currently have exported, select **View > Exported Documents**, or click the Exported Documents icon.

(Optional) If you are the administrator, you can display all documents currently checked out, or you can filter the list by a specific user.

Use the Local Document Organizer to Checkout a Document that is Already Copied Out

You can use the Local Document Organizer to check the status of your active documents, or to checkout documents that you have already copied out. By checking out documents that you have already copied out of ProjectWise, you lock the document down from further modifications by anyone else until you import or check the document back into ProjectWise.

Use the following procedure to checkout documents that you have already copied out of ProjectWise:

Step	Action
1	Open Local Document Organizer (Tools > Local Document Organizer).
2	Select View > Copies . All documents that are currently copied out to you display in the list.
3	Select a document in the list.
4	Select Action > Check Out .

The status of the document changes to checked out, and is removed from the list of copied out documents.

You can see the document in Local Document Organizer by selecting **View > Check Outs**.

Use the Local Document Organizer to Check In Documents that are Currently Checked Out

Once your document changes are completed, or if you want to purge your document updates back into ProjectWise and continue working on your document, you can use the Local Document Organizer to check in files that are currently checked out of ProjectWise.

Use the following procedure in order to use the Local Document Organizer to check in documents that are currently checked out of ProjectWise:

Step	Action
1	Open Local Document Organizer (Tools > Local Document Organizer).
2	Select View > Check Outs . All of the documents you currently have checked out display in the list.
3	Select one or more documents in the list.
4	Do one of the following: To check in the document(s) and delete the copy of the

Step	Action
	document from your working directory, select Action > Check In . To check in the document(s) and retain the copy of the document in your working directory, select Action > Check In Leave Copy .

Update Server Copy Using the Local Document Organizer

1. Open Local Document Organizer (Tools > Local Document Organizer).
2. Select **View > Check Outs**.

Any documents that are currently checked out display in the list.

3. Select one or more documents in the list.
4. Select **Action > Update Server Copy**.

The copy of the document(s) is updated and a copy is left in your local directory.

Free Checked Out Exported Documents Using the Local Documents Organizer

1. Open Local Document Organizer (Tools > Local Document Organizer).
2. Select View > Checked Out Documents or **View > Exports**.
3. Select one or more documents from the list.
4. Do one of the following:

To free the document and delete the copy of the document from your working directory, select Action > Free.

To free the document but leave the copy of the document in your working directory, select Action > Free Leave Copy.

Remove Copies of Documents from the Working Directory, Using the Local Document Organizer

1. Open Local Document Organizer (Tools > Local Document Organizer).
2. Select View > Copies.
3. Select one or more documents in the list.
4. Select Action > Purge Copy.

The local copies of the selected documents are deleted from the working directory.

**Import
Exported
Documents
Using the Local
Document
Organizer**

1. Open Local Document Organizer (Tools > Local Document Organizer).
2. Select **View > Exports**.
3. Select one or more documents in the list.
4. Select **Action > Import**.

The Check In Document dialog opens.

5. (Optional) Type a description of the changes made to the selected document(s).
6. Click **OK**.

The selected document(s) are imported and the local copies of the exported documents are removed from the folder to which they were exported.
