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# PROJECTWISE WEB & PROJECTWISE DRIVE USER MANUAL

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# Summary

ProjectWise Web is a Bentley cloud-hosted service that provides access to the project via a web browser (Microsoft Edge is preferred, Chrome and Firefox acceptable).

ProjectWise Web and Drive are interfaces for users to access live project data. Unlike other systems where you access a copy of project data, live project data accessed via ProjectWise Web interface can be used for real time project collaboration at anytime from anywhere.

Cooperation with external partners is much easier using ProjectWise Web, as they can be provided with access to the web-based application which - unlike ProjectWise Explorer - requires no installation and configuration.

**Who Should be Using ProjectWise Web**

ProjectWise Web

If your role in the project is typically creating/viewing/modifying Microsoft Office and PDF documents, then ProjectWise Web is for you.

ProjectWise Explorer

If your role is to use design tools such as AutoCAD and MicroStation, then you will need to use design tools such as Autodesk or Bentley suite of tools, as those applications require a high level of integration.

To cooperate with ProjectWise Web users effectively as a CAD/BIM user, you need to adopt some new best practices. One of them is to share links that can be accessed in a web browser. You can find more information after Prerequisites section.

**What are the core benefits of using ProjectWise Web**

- Single Sign-On with a Bentley Identity Managed Services (IMS) Account, which all Jacobs users have; our external partners can also register a Bentley IMS account, which is at no cost.
- Create files and folders
- View file properties and attributes and edit attributes
- Review and mark up PDFs using the built-in PDF application,
- Create Sets to organize files

**New Features**

- Co-author Microsoft Office documents as you can in Office 365 or SharePoint
- No software to install; only need a Web Browser and access to the internet
- Microsoft Teams integration
- Advanced document workflows and document codes

# Prerequisites

When accessing ProjectWise Web, ProjectWise Drive or other web hosted Bentley services, users, must use their Jacobs Email address as their login.

**Note:** Passwords are not required, due to active directory single sign on settings.

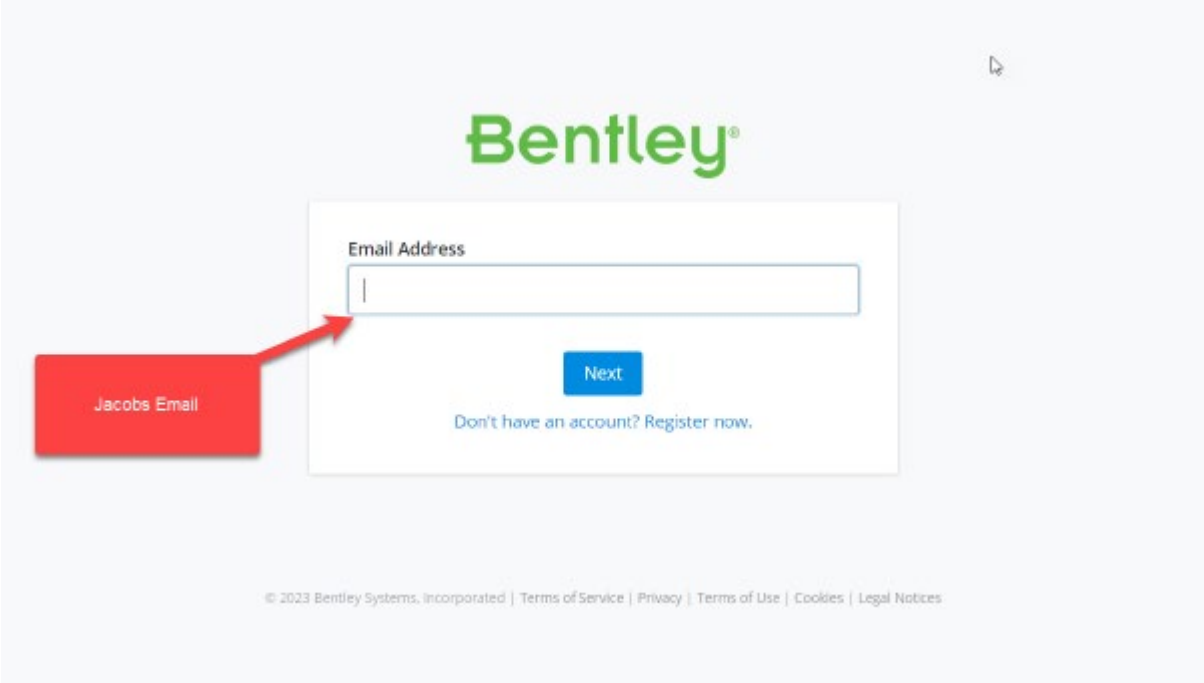
Before accessing files from ProjectWise Web, the following actions must be completed.

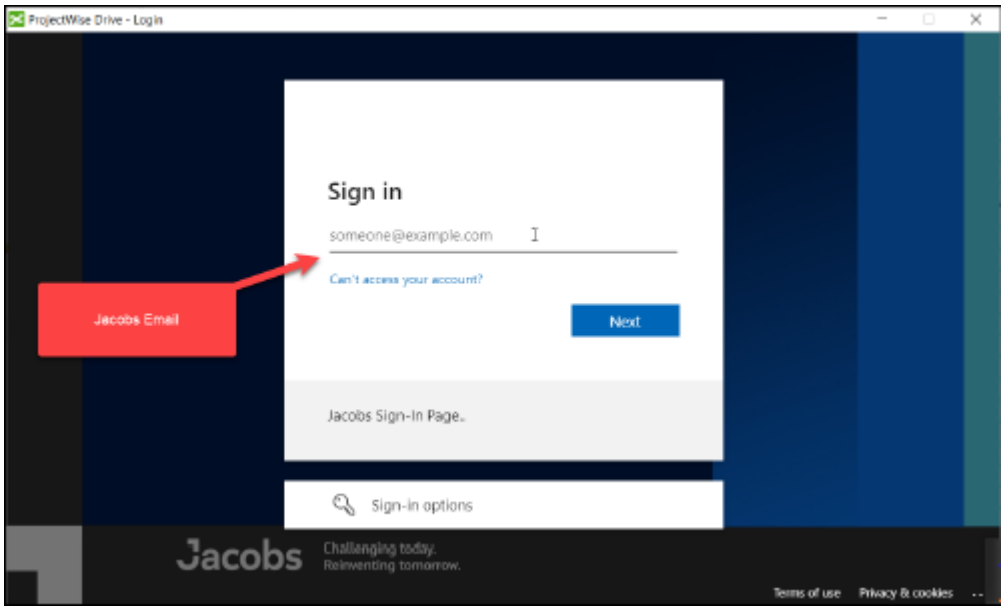
- **Access to the project:**
  - Projects vary on the access permitted within the project, by the role the user(s) have within the project. Permissions to the project are granted by the defined project administrator and consult with the project manager, who can provide access to the project information.

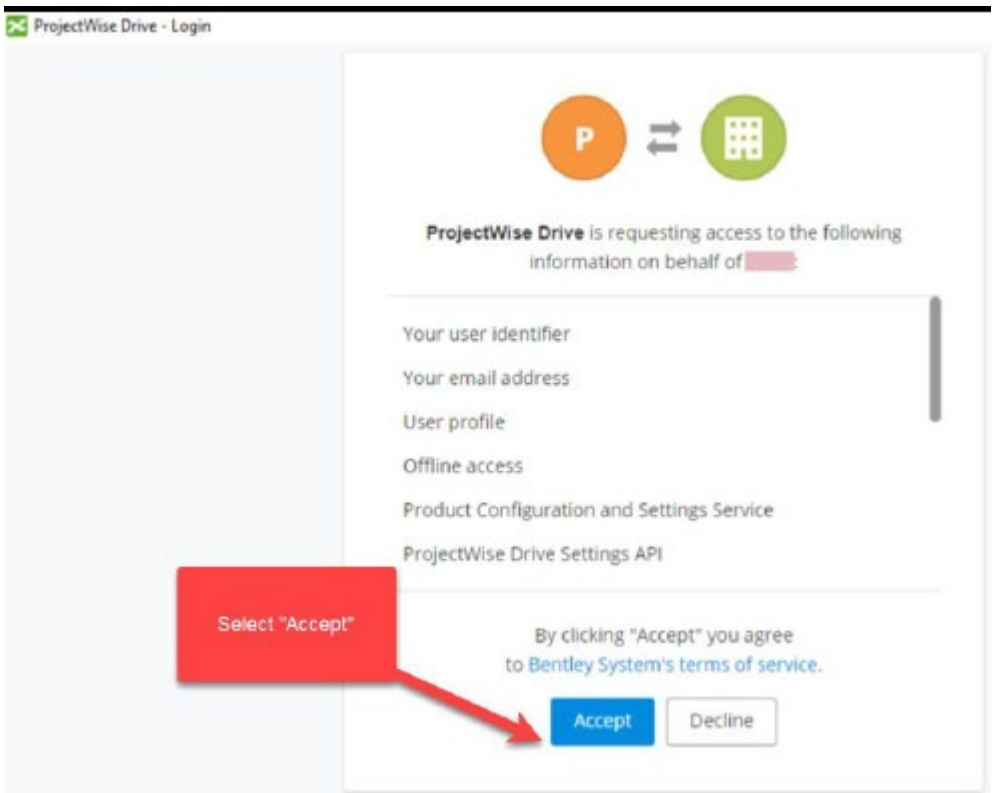
- **ProjectWise Drive Installed:**
  - ProjectWise Drive allows you to access and work with files stored in ProjectWise cloud services. You should already have ProjectWise Drive on your computer. If you don't, you can install it in the following way:

Steps to install ProjectWise Drive:

1. Close ProjectWise Explorer
2. Open Software Center
   a. From the start menu, type in Software Center
3. Select the ProjectWise Drive application
4. Select Install to start ProjectWise Drive Installation
5. Additional logins are required as shown below:



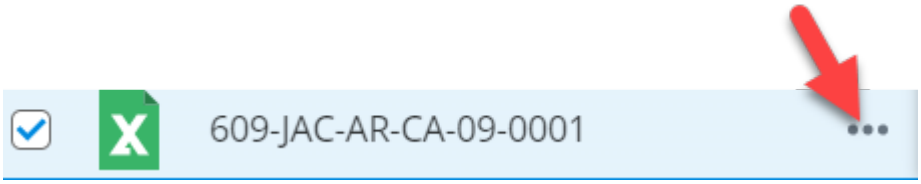


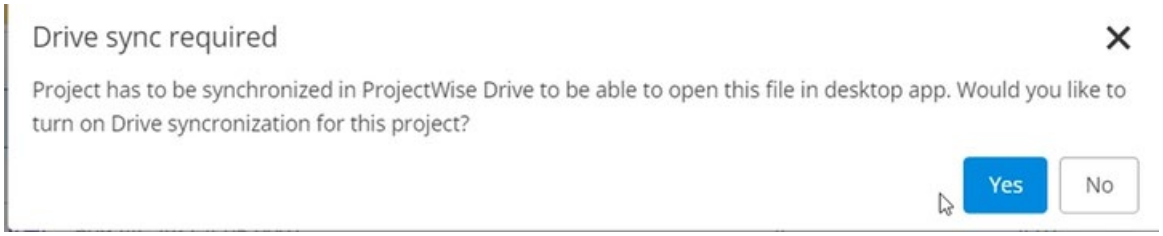

- **Set ProjectWise Web – Connected Project to Synch with ProjectWise Drive:**

In order to make the most out of ProjectWise Web, following steps are recommended:

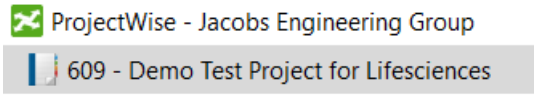
- <u>**Option A**</u>
  - Browse within ProjectWise Web, select an Office document
  - Once a file is selected, on the right-hand side of the file, three dots



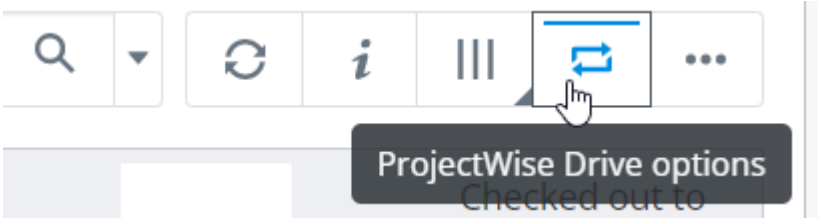

- A dialog will open, prompting you to turn on synchronization; select Yes



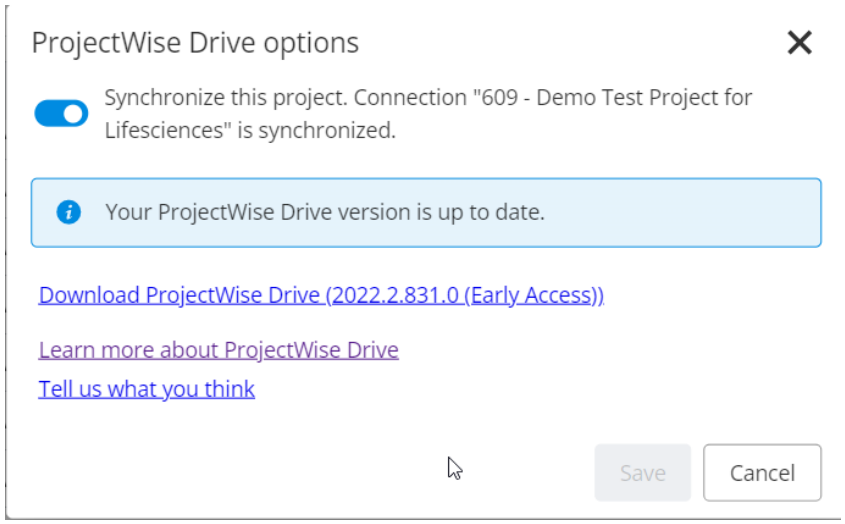

- Open Windows Explorer, a folder name ProjectWise Drive will now be created, and the synchronized project will be displayed



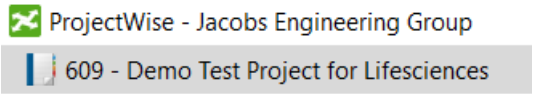

- **<u>Option B</u>**
  - Open ProjectWise Web
  - From the Menu Bar, select ProjectWise Drive Icon




- Turn on Synchronization




- Open Windows Explorer, a folder name ProjectWise Drive will now be created, and the synchronized project will be displayed




**IMPORTANT:** Multiple Projects can be synched, however each user will eed to sync the project they want to access within ProjectWise Drive.

- **Web Browser Pop-Ups are allowed**
    - Many options within ProjectWise Web have display menus that are temporarily displayed; if the web browser does not allow pop-ups, the informational dialog (pop-up) will not display. Please submit a Service Request, the event assistance is required.

## Sending ProjectWise Links from ProjectWise Explorer, PW Web and PW Drive

**Requirements:**

- ProjectWise Explorer Version: 10.00.03.4xx (xx are minor version numbers)
- Recipients must have access to the project information from which the link is sent.

**Overview:**

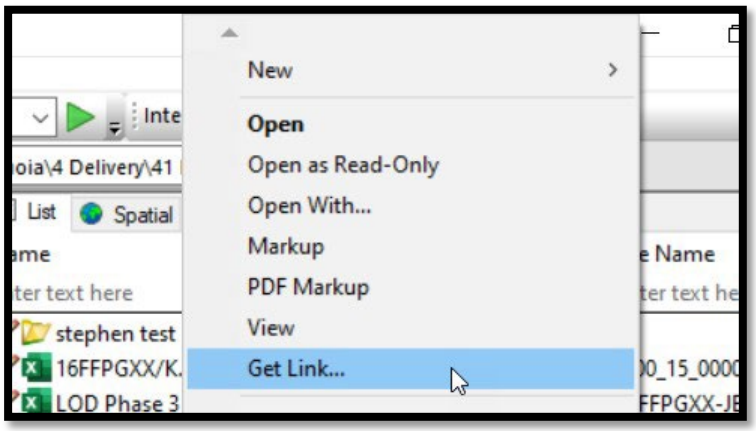
When sending links from either; ProjectWise Explorer, ProjectWise Web, or ProjectWise Drive, use the link option of "Ask to select". This allows the recipient to choose what interface they want to open the file within.

**Limitations:**

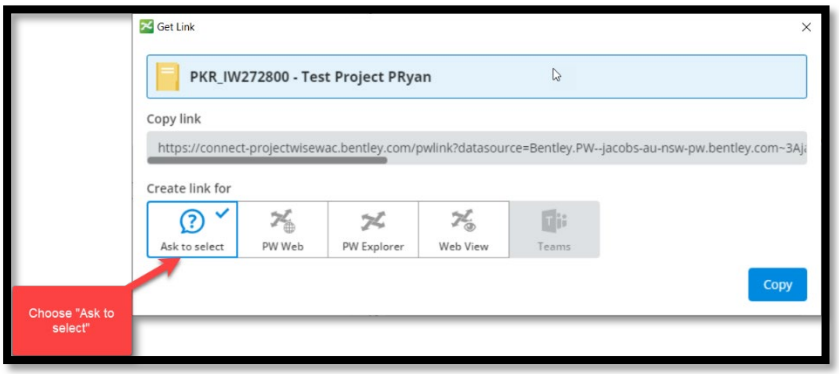
- You can select multiple objects when creating the links. However, they must be either Folder(s) or File(s). You cannot combine file(s) and Folder(s)
- Links cannot be sent to a ProjectWise Drive location. Links can only be sent to ProjectWise Explorer, ProjectWise Web or ProjectWise View locations as described below.

## Sending links from ProjectWise Explorer

- Navigate to the folder(s) or File(s), select the object(s), right-click, and from the popup menu, select “Get Link.”



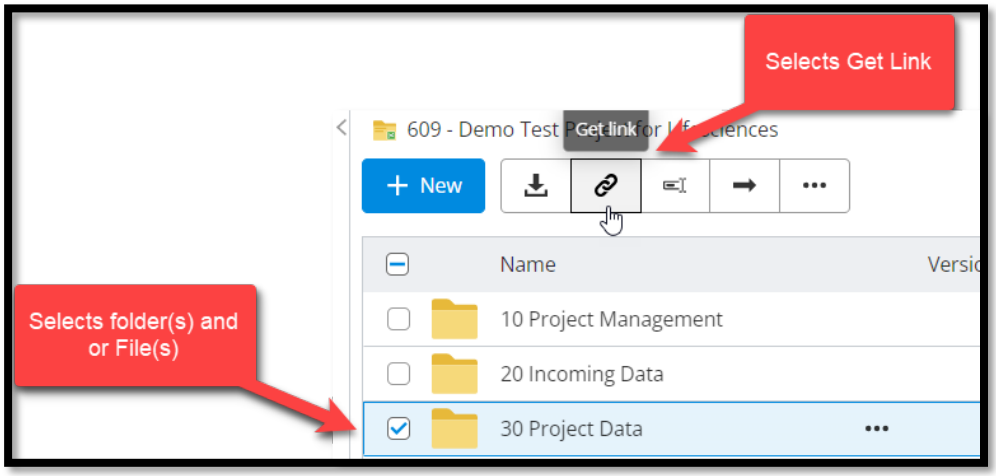

- The following dialog will open; select the option “Ask to select” as shown in the snapshot below



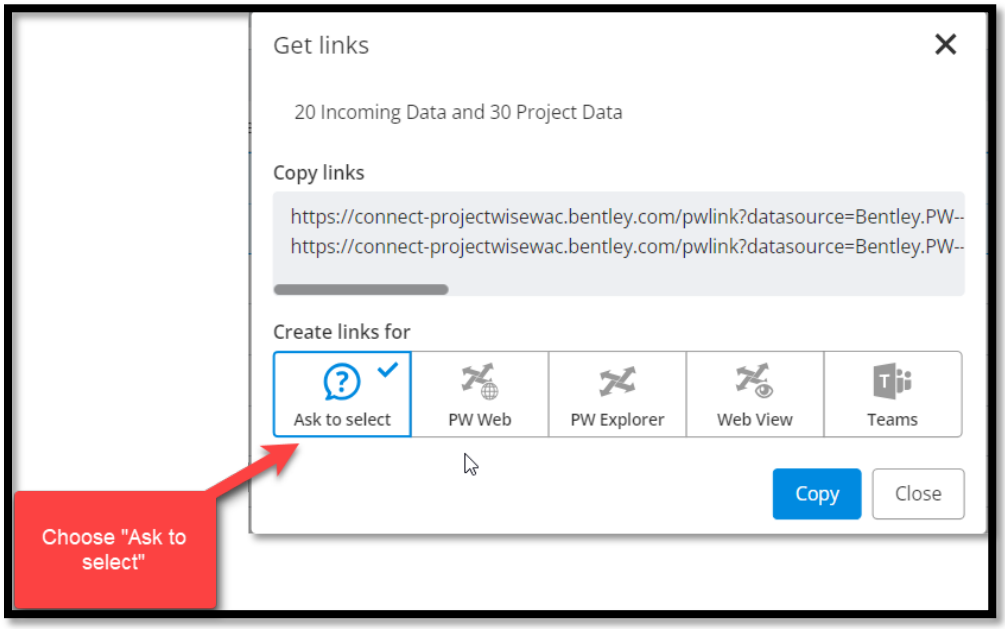

- Select “Copy”, create an email, and paste the link .

## Sending links from ProjectWise Web

- Navigate to the folder(s) or File(s) select the object(s) and choose the “Get Link” option



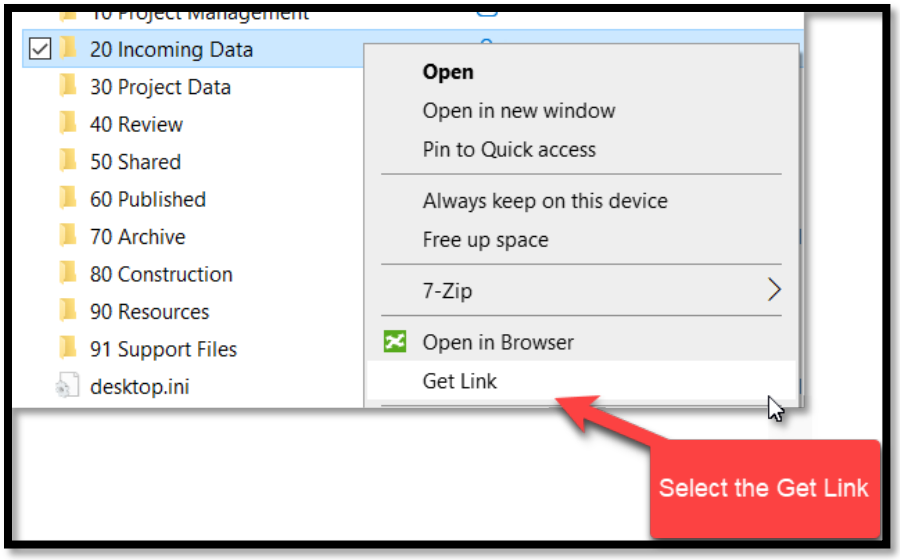

- The following dialog will open. Select the option “Ask to select” as shown in the snapshot below



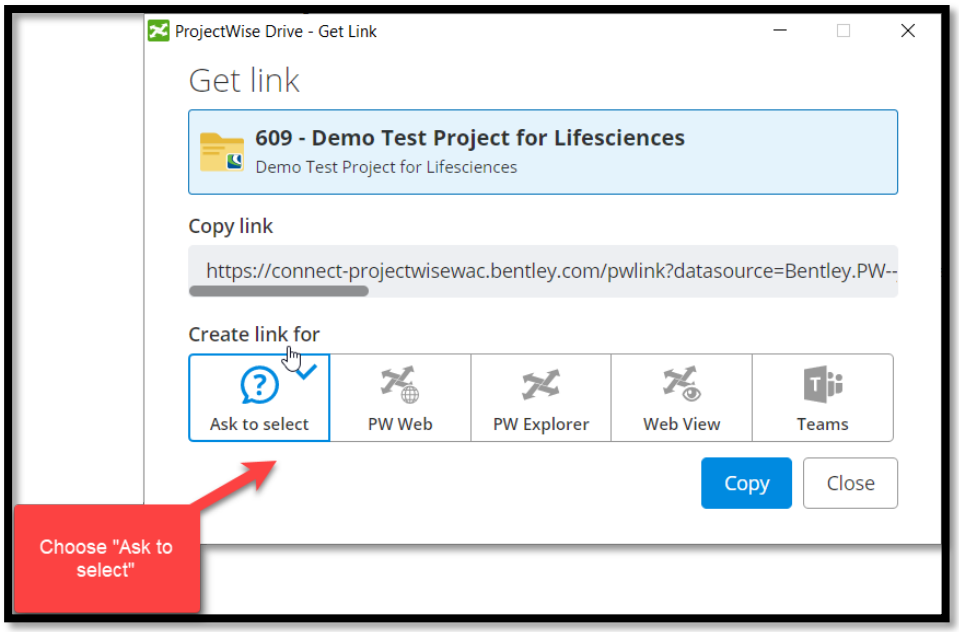

- Select “Copy”, create an email, and paste the link.

## Sending links from ProjectWise Drive

- Navigate to the ProjectWise Drive folder/file location, select the object, right-click and from the popup menu, choose "Get Link."




- The following dialog will open. Select the option "Ask to select" as shown in the snapshot below



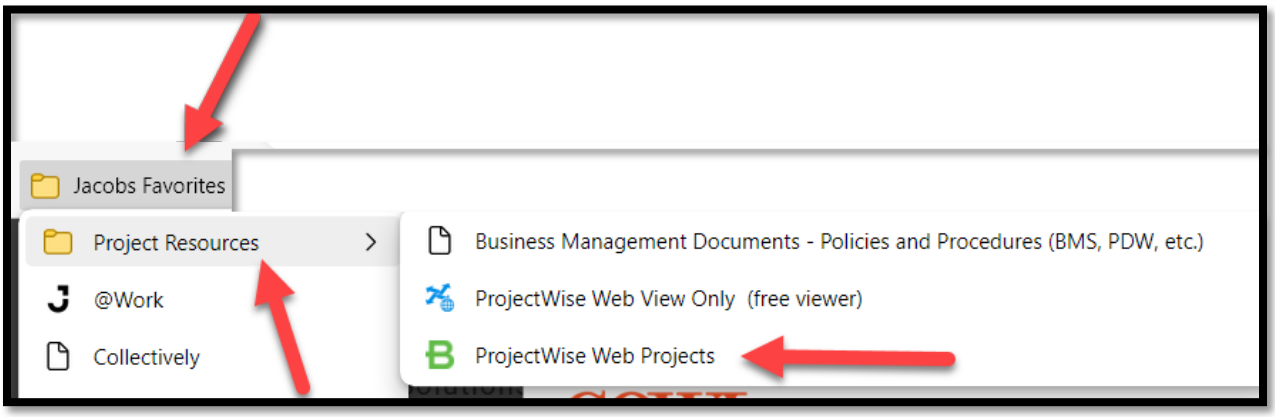

- Select "Copy", then send the email and paste the link.

# Accessing ProjectWise Web and the project set up

All links to ProjectWise Web are project specific therefore we can use the ProjectWise View to get to the projects in the ProjectWise Web.

## How to find non listed project on the ProjectWise Portal page

When accessing ProjectWise Web via the **Jacobs shortcut**:

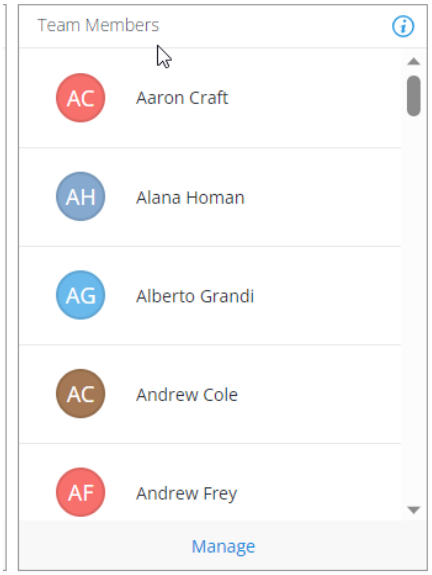



If the project is not listed under the **My Projects** section, nor can it be found using the search; it is due to two reasons.

1. The Project is not connected and is identified within ProjectWise Explorer by the icon below. In this case, a service request to the ProjectWise support team will be submitted to join the project.

NOTE: if the user only needs read access, the user can access the project information via **ProjectWise View** Jacobs ProjectWise View

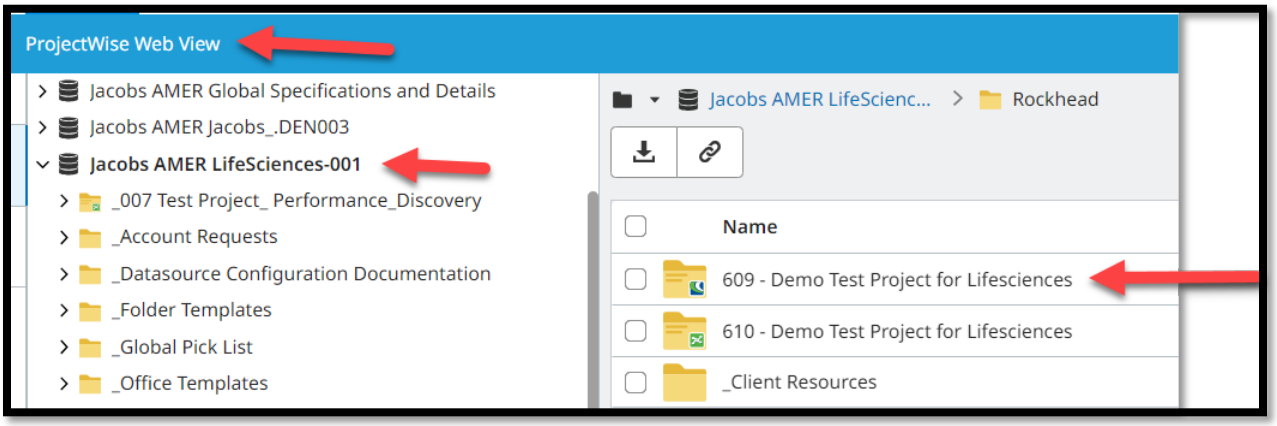
2. Or the user is not listed in the Connect Project Team Member.



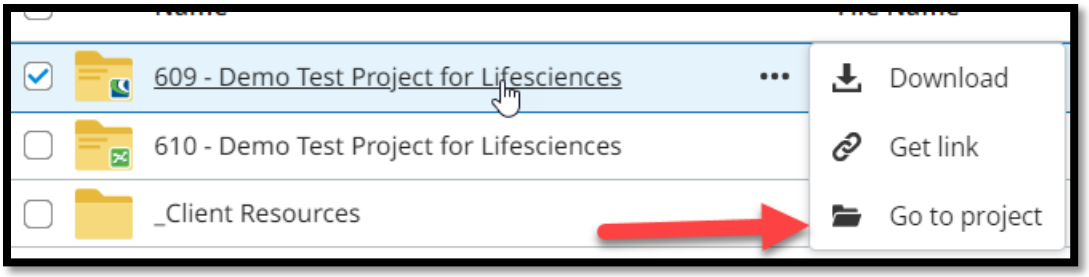

The following steps can be performed when the project is a **Connected Project.**

**Steps**

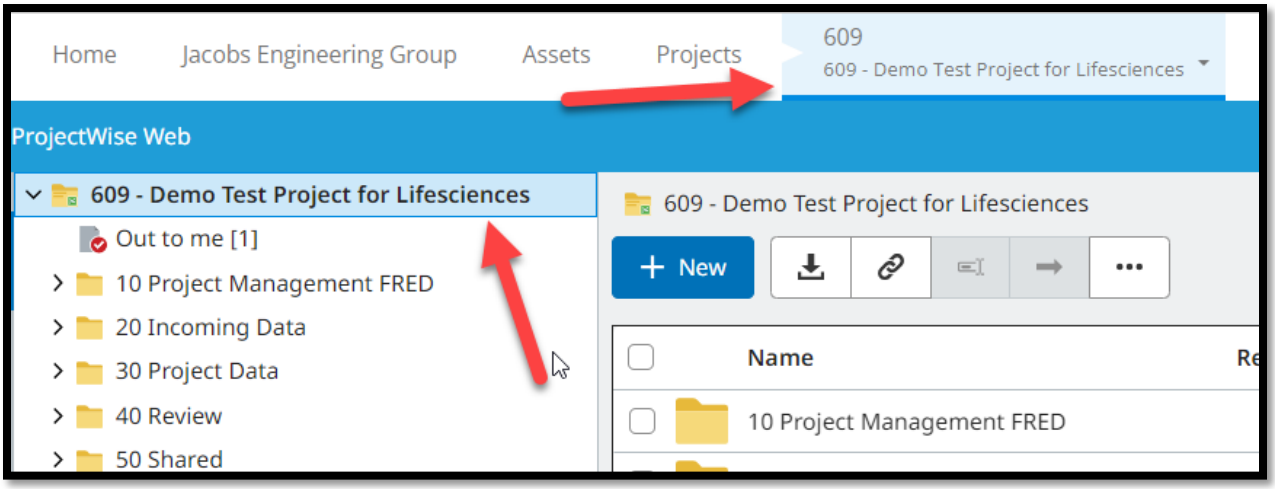
1. Go to ProjectWise View [Jacobs ProjectWise View.]
2. ProjectWise View displays all of Jacobs ProjectWise data sources, select the data source, and navigate to the project.




3. Select the Project; note the icon on the lower right bottom of the folder icon; this will indicate the project is connected (see image above).
4. Right-click the project, and from the menu option, select **Go to project.**




The link will open the project ProjectWise Web page and list the project.




5. When accessing the ProjectWise Web page, the **Team Members** will be modified, adding the user as a team member. The user will now be able to access the project from the **My Projects** section.
6. Finished.

## Working with Documents in ProjectWise Web Options

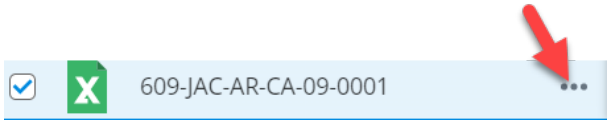
As a ProjectWise Web user, you have several options at your disposal when it comes to editing Microsoft Office documents. The following session presents all of them, as well indicates "Preferred Option" that the ProjectWise Support team recommends, along with other directions related to editing Microsoft Office Documents.

## Open with Desktop Application - Preferred

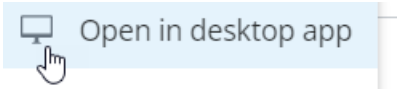
The "Open in desktop app" option automatically checks the document to the user; it is automatically checked in when the file is closed.

Steps for opening/editing/checking in office documents

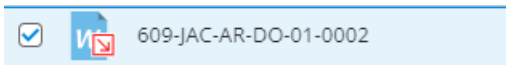
1. Select the official document, and select the three dots at the end of the selected file




2. From the menu option, select **Open in the desktop app** menu




3. The file will be opened from the ProjectWise Drive Location; by the associated application
    a. The icon will refresh as shown below (See ProjectWise Web icons)




4. Once the edits are completed, and saved, close the application
5. The file will be checked in automatically
    a. The file will be available for other users to access

**ATTENTION:**

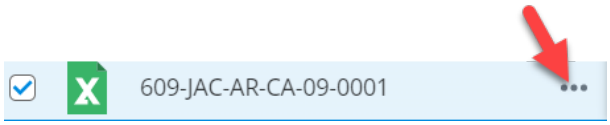
- During the duration of file modification, there is no method to update the server copy for others to view the progress of the changes.
- The file will automatically be checked in when the file is closed.
- In the event the user does not want the changes uploaded, see Section How to Free a File

## Open using the Check Out option

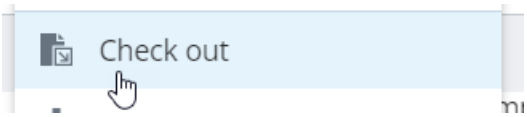
Using the "Check Out" option requires manual "Check In" of the file once the file is saved and the application is closed. With the synchronization of ProjectWise Drive, the user will browse through the project, locate the file, and proceed with "Check In."

Steps for opening/editing/checking in Office documents

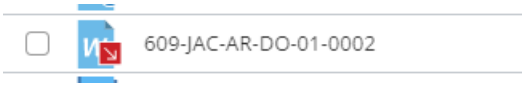
1. Select the document, and select the three dots at the end of the selected file



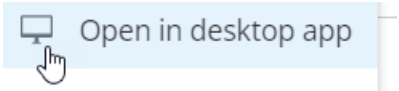

2. Select the Menu Option, **Check out**




3. The file icon will change to display that the file is checked out (See [ProjectWise Web Icons])




4. Select the office document, select the three dots at the end of the desired file, and select the menu option **Open in the desktop app**. The file will open with the associated application




5. The file is now opened and read-only to all other users.
6. Once the modifications have been completed, save the document, and close the application.
7. The file will need to be checked in
8. Select the file from the right-click menu, choose **Check-in**

9. The file will be checked in automatically.

Check in will upload any changes from your local copy to the ProjectWise Server and replaces the previous file. At the time of Check in the file is automatically unlocked and marked available to all other users to Check out the file.

**IMPORTANT:** When a file is opened with the option of "Open in Desktop Application" the associated application will automatically check the file out, then open the file, when all edits are completed, and the files is saved, (note in some instanced of Office documents the auto save is the default so there is no reason to save) and then the application is closed the file will be checked in automatically.

If the option to manually check out the file is used, and then use the option of "Open in Desktop Application" after all edits are completed and the application is closed, the user will have to manually check the fil in, the file will be checked in without any need to brows to the document location. Along each of these operations, the file is locked an no other user can make changes to the file until such time as it is checked in.

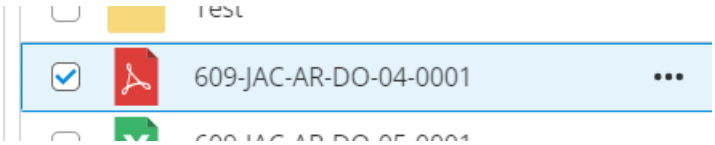
**ATTENTION:** Use the Free option ONLY if the edits to the document are NOT wanted, as if the user selects Free, all changes will be lost.

## Editing attributes within ProjectWise Web

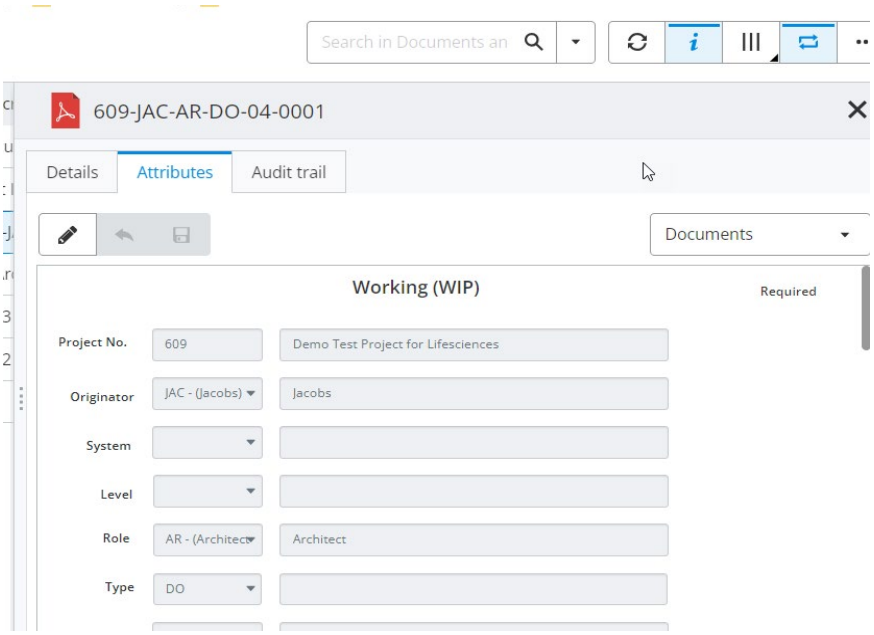
**Requirements:** The document needs to be in a folder that has a ProjectWise Environment set.

**Steps:**

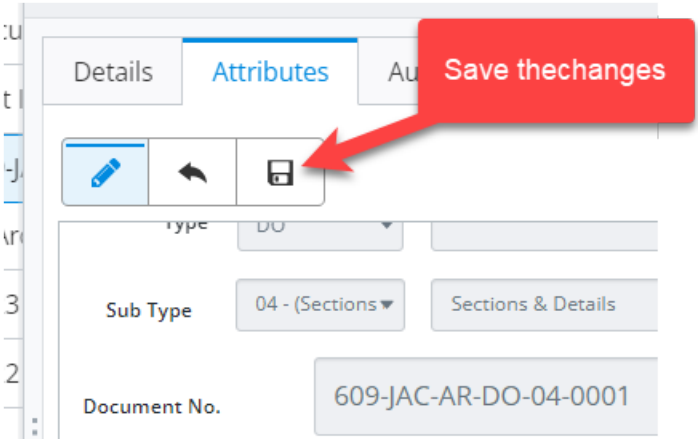
- Select the document




- Select the icon as shown below, then the fly-out dialog will open




- Choose the "Attributes" tab. **Note**: if the "Attributes" tab does not appear, it means that there is no ProjectWise Environment set on the folder.
- Select the "Pencil" icon to start modifying attributes
- Once completed, select the "Save" icon



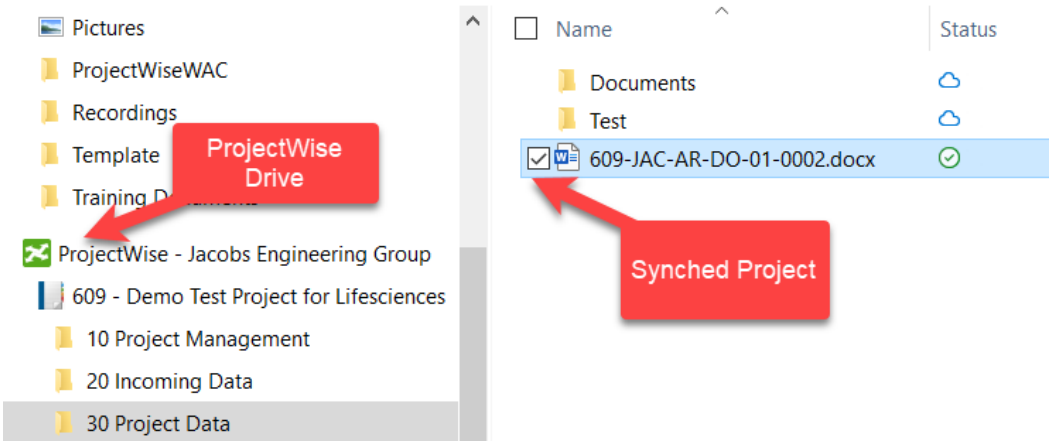

- All edited attributes are saved, please close the fly-out dialog.

## Working with Documents in ProjectWise Drive Options

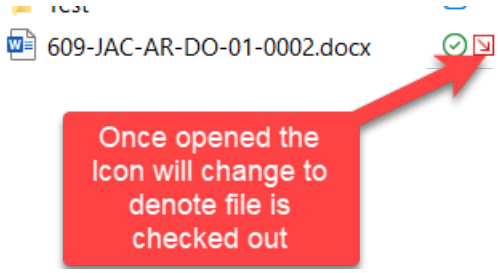
Opening office documents within ProjectWise Drive is much like opening office documents within Microsoft OneDrive. There isn't a specific ProjectWise Drive option; the file can be opened by either selecting the file and double-clicking to open it or opening an office application and browsing the document within ProjectWise Drive.

**ATTENTION:** Versioned documents are not available within ProjectWise Drive.

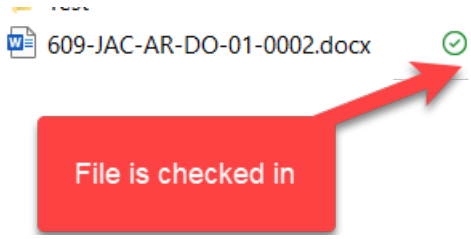
## Double-Click / Open in Application




When the file is opened, the icon will change to denote that the file is checked out,




When closing the application, the file will automatically be checked in, and the icon will change to denote that the file is no longer checked out.

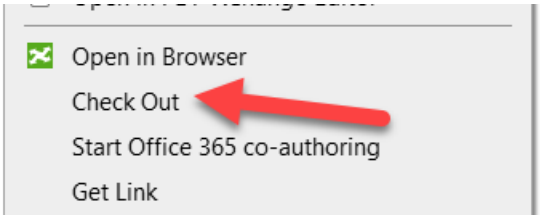


## Check out

By selecting the file, right-click, and from the windows menu, an option to is available to Check Out a document. Once the file is checked out, the file can be opened, and changes can be made. This, however, doesn't open the record; it simply locks the document from any other user opening it.

Steps to Check out and Open a file

1. Right-Click the file and choose to Check Out




2. The file is now checked out
3. Right-Click the file and choose Open, the document will open, and changes can be made
4. When the file is closed, select the file, and from the ProjectWise Drive menu, select Check In

**ATTENTION:**

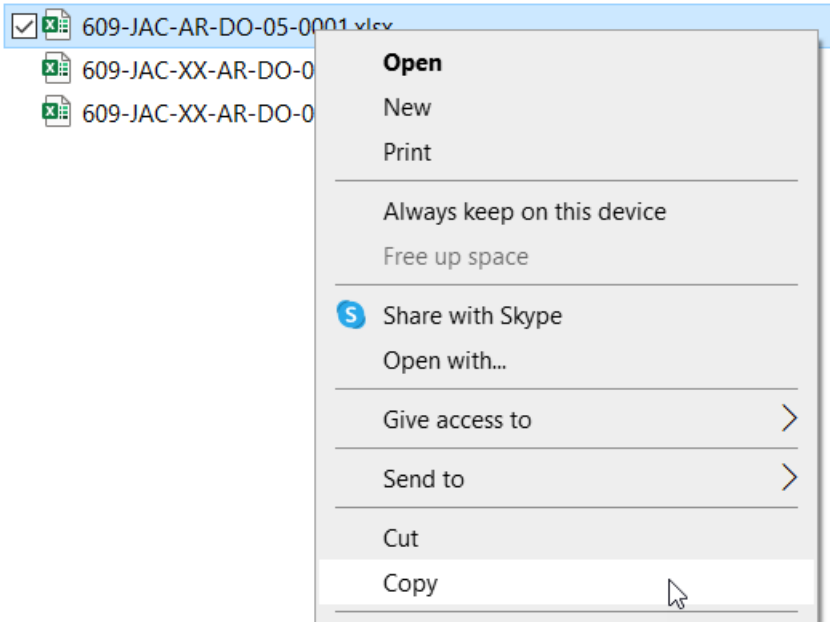
- Only use Free if the changes are NOT to be saved.

## Copying files in ProjectWise Drive

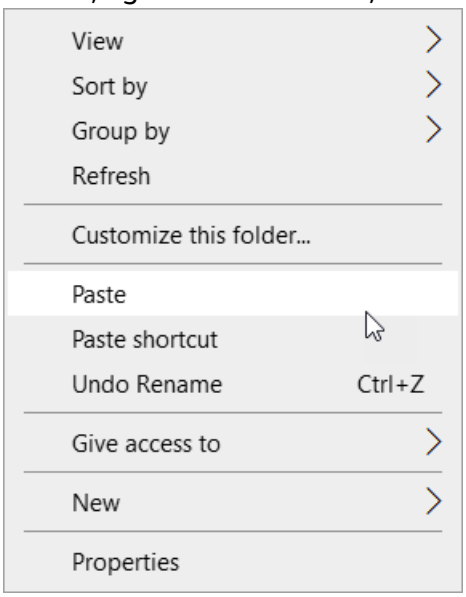
**Note:** ProjectWise Web does not allow for copying of files. If the user needs to copy files, the project needs to be synced to the ProjectWise Drive.

**Steps to copy a file within ProjectWise Drive**

- Navigate to the ProjectWise drive location where the file is located
- Select the file and right-click from the popup menu, select "Copy"

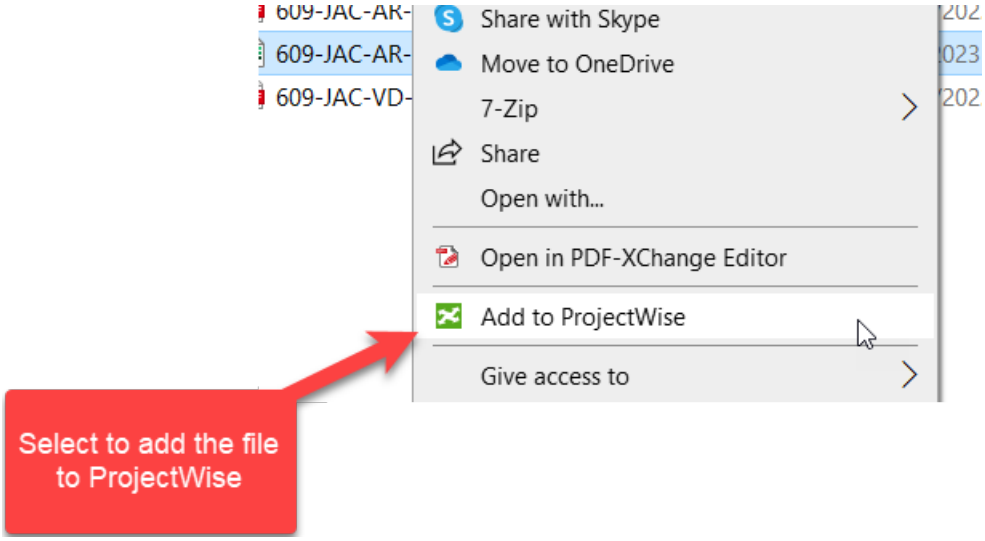



- Navigate to the destination folder, right-click the folder, and select "Paste" option

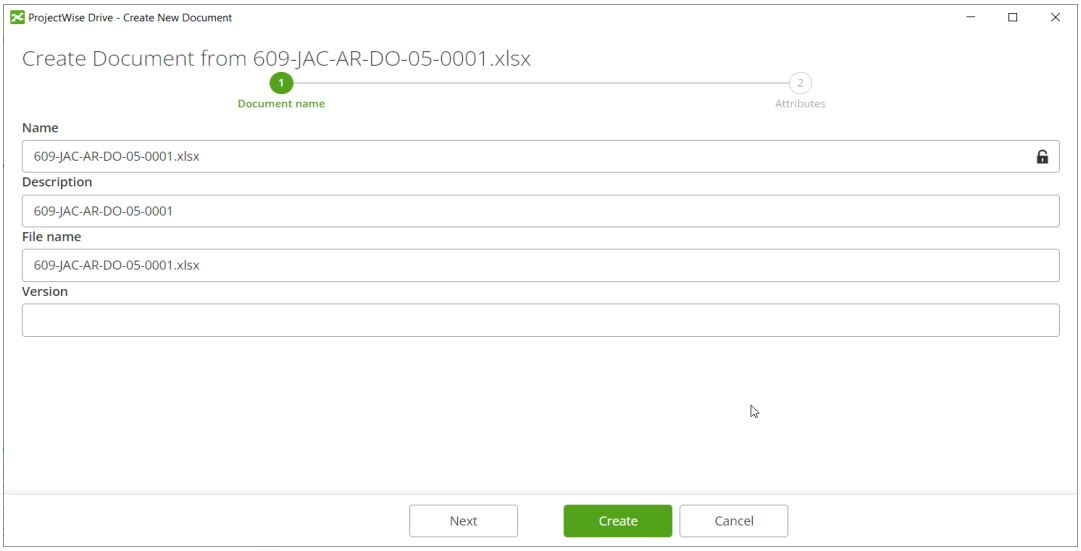



- Once the file is copied to the destination folder, the file icon will show as a "snowflake". It means that the file has **NOT** been uploaded to ProjectWise.

- To upload the file to ProjectWise, select the file, then right-click, and from the popup menu select 'Add to ProjectWise'.




- A dialog will open allowing the file to be renamed, or another version added



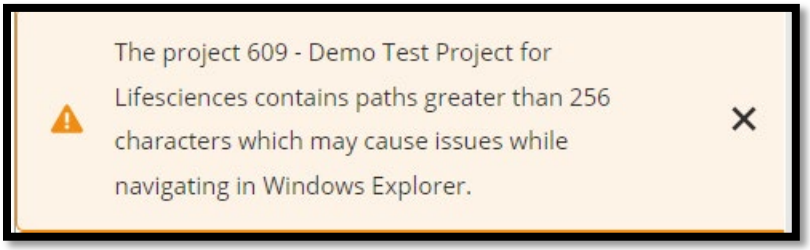

- Select the "Create" button to add the file to ProjectWise. Then, the file has been added.

# ProjectWise Drive – file paths exceeding 256 characters

When you use ProjectWise Drive to synch projects to the user's PC, it is common to receive a notification from ProjectWise Drive that the file path is over 256 characters. This will prevent a user from opening the file via ProjectWise Drive.

## Notification

When synching a project, the users will be presented with a ProjectWise Drive message, as shown below,

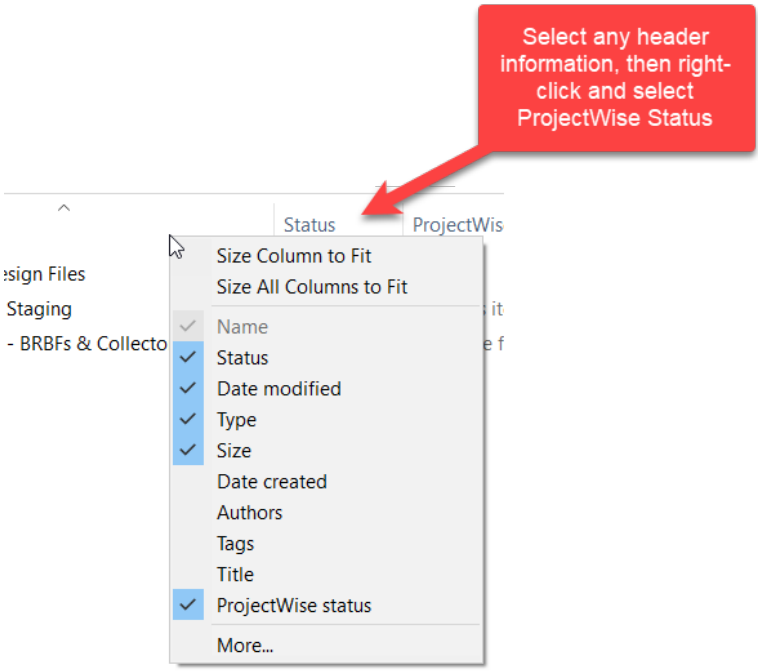



**Example:**
C:\Users\herrics1\ProjectWise\Jacobs Engineering Group\Project Sparrow\DESIGN\ST\7_Detailed_Design\Packages\FP-02B\Calculations\IFC\FP-02B\Section 6 - BRBFs & Collectors (Fab, Jungle Gyms, NTT)\Section 6 Staging

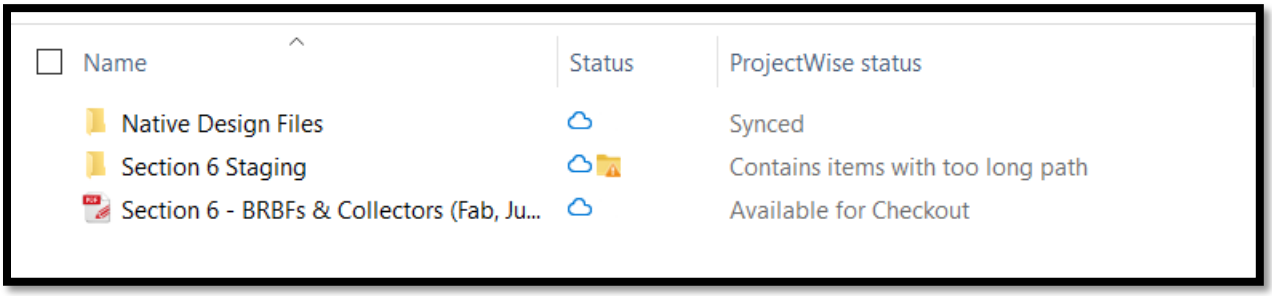
PW Web Link: 6.1 - 20_DRB-07 Fab GL 9 and 25 BRBF Columns.pdf (Version: 1)

To view the ProjectWise Drive Synched Folder/File Status, which will indicate the 256 character limitation.

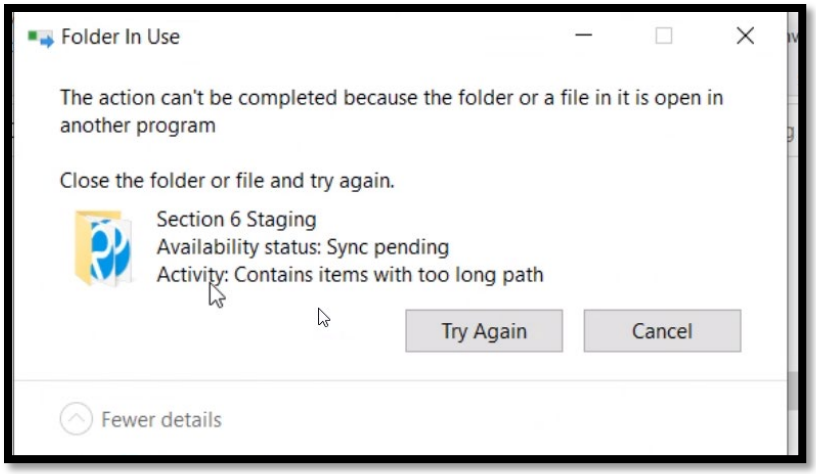
1. Open Windows Explorer.
2. Navigate to a folder that is in question of the character limitation.
3. Right-click on the header of Windows Explorer, where the columns are being displayed, and check on **ProjectWise Status**




Note the message within the ProjectWise Status; this will indicate that any documents within that folder cannot be opened within ProjectWise Drive.

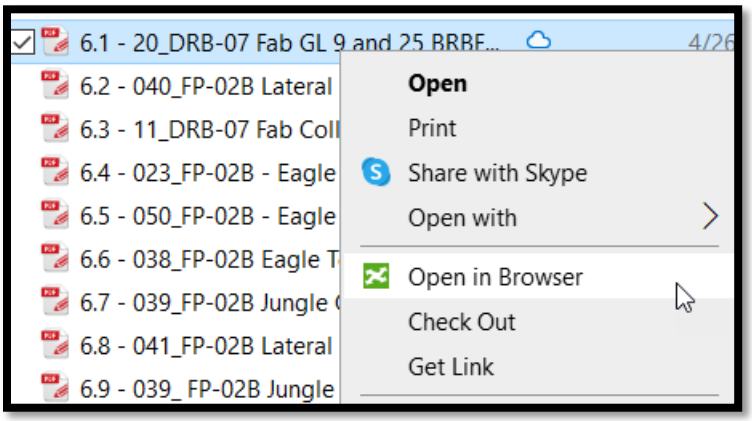



When trying to open a file that exceeds the 256-character limit, a window notification will be displayed, alerting the user that the file cannot be opened.




## Opening files that exceed the 256-character limit

Once the user has determined that the file cannot be opened in ProjectWise Drive, then can select the file, right-click, and from the ProjectWise Drive menu selects: **Open in Browser,** as shown below.

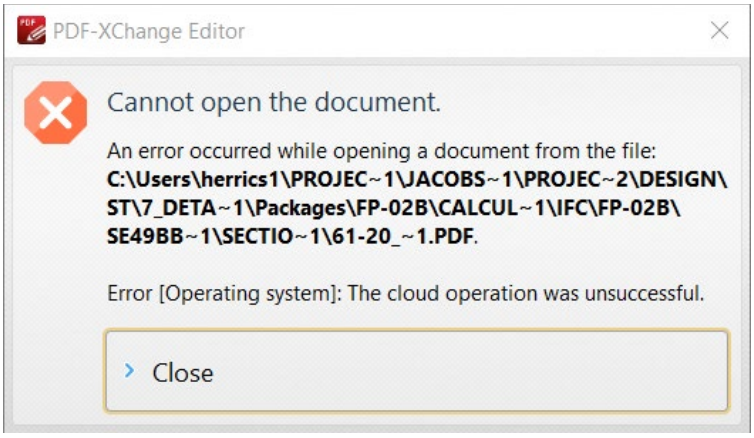


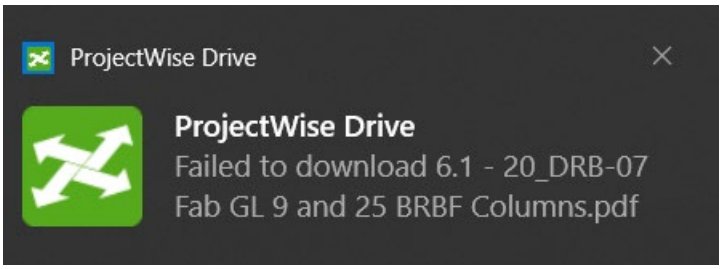

ProjectWise Web will open, and then, the file will be selected.

The option to use **Open in Desktop Application** cannot be used, as the file is being opened within ProjectWise Drive, in which the file path to download the file and open it exceeds 256 characters.

**NOTE:** Use the Co-Authoring method if the document type is a Microsoft 365 type. This method can open files exceeding 256 characters, as the file is opened in One Drive, not ProjectWise Drive.

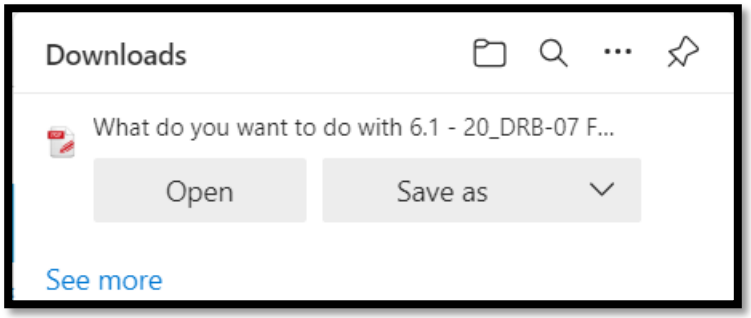
An error message will open depending on the associated application, informing the user that the operating system cannot open the file. A ProjectWise Drive notification will also open; see below for a sample error message.



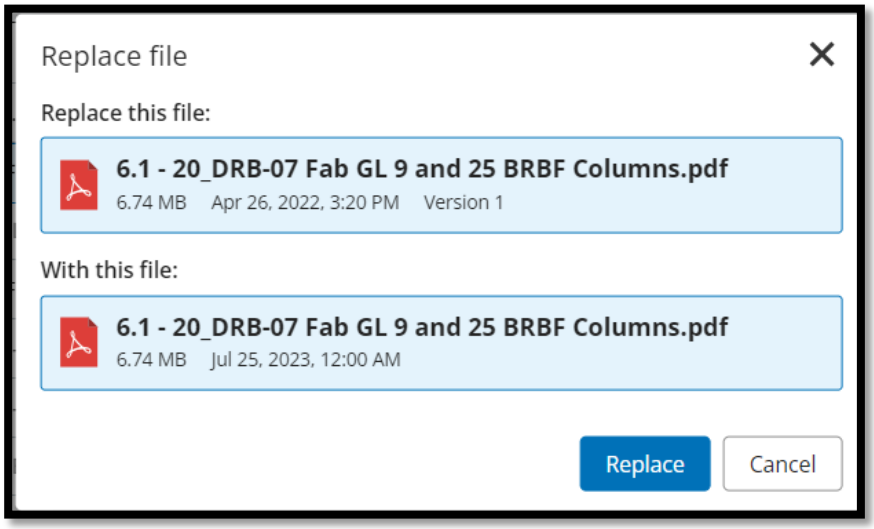




## Opening a non-Microsoft 365 document type that exceeds 256 characters

1. Select the file, right-click, and select **Check Out**
    a. This will prevent other users from modifying the file.
2. Select the file, right-click, and select **Download.**
3. An internet download window will open, prompting the user to Save As and select a folder to download the file.
    a. Example: C:\temp\pw_WebDownloads



4. Browse to where the file was downloaded and open the file.
5. After making the necessary changes, the file that was Checked Out (then downloaded and modified) will need to be updated.
    a. Select the checked-out file, right-click and select **Check-In,** and from the menu option, select **Free.**
        i. As the file was only checked out so that no other user could modify it while it was downloaded and modified, there are no changes to be lost by selecting free. Free allows for the next steps.
    b. Once the document has been freed, then select the document, right-click, and choose the **Replace file** option.
        i. This will allow the user to replace the existing file with the downloaded and modified file.
    c. A Windows dialog will open, prompting the user to navigate to the file modified when downloaded.
    d. When the user selects the file, a dialog displays the file to be replaced and the file that will replace it. **ENSURE BOTH FILE NAMES ARE THE SAME.**




    e. The file has now been replaced with the changes that were made.
    f. Task is completed.

## Alternative Option

If it is desirable to version the file, please refer to the Versioning within ProjectWise Web. The process for versioning may be more desirable.

# Co-Authoring Microsoft Office Documents – ProjectWise Web

## Co-Authoring Overview

The co-authoring feature of Microsoft 365 lets people work on the same Office document simultaneously (this is called collaborative editing). ProjectWise Web integration with Microsoft 365 allows Jacobs ProjectWise Web users to check out an Office document from ProjectWise for co-authoring.

When you start or join a co-authoring session in ProjectWise Web, Microsoft 365 will prompt you to sign in with your Microsoft 365 account. After signing in, Microsoft 365 may also prompt you to give ProjectWise Web permission to access OneDrive for Business (see the next section).

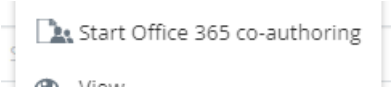
**How it works?**

Starting or joining a co-authoring session from ProjectWise Web places a copy of the document in your Microsoft OneDrive for Business account in the cloud and then opens the selected Office document for collaborative editing. The document opens in your Office desktop app if ProjectWise Drive is installed and running, or it opens in a new browser tab if ProjectWise Drive is not installed (or if it is installed but not running). Once a user starts a co-authoring session for a document, other users can check out the same document for collaborative editing by joining the co-authoring session.

## Starting a co-authoring session

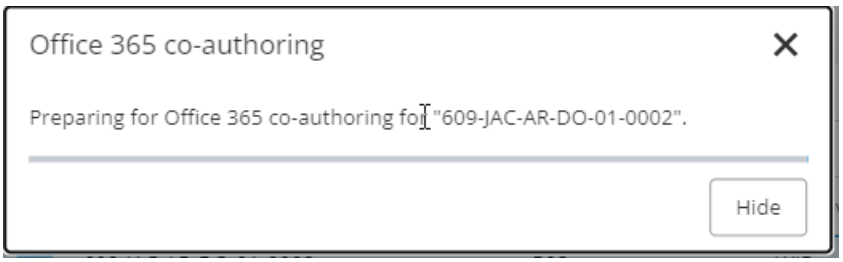
To start a co-authoring session for an Office document, click the check box next to the document and select Open > Start Office 365 co-authoring.

1. Select the file, and from the 3-dots, select “Start

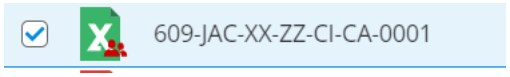



At any time you can check the document you are co-authoring and go to the Action Menu (at top right of screen). Information panel button and click on the Audit Trail Tab to see the date a document was edited (co-authored). Then click on any date to see who participated in co-authoring document.

2. A progress notification will open



3. The icon will be updated, denoting the Co-Authoring session. (See ProjectWise Web Icons) The document will open with the Associated Office Application. Edits can be made.




The document opens in your Office desktop app if ProjectWise Drive is installed and running, or it opens in a new browser tab if ProjectWise Drive is not installed (or if it is installed but not running).

After you Start Office 365 co-authoring session you will have the ProjectWise Web option to 'Open in desktop app' (use this option vs working in browser window by 'closing the browser window'). After you open file in Desktop app select 'Reviewing' option at the top of the page

A. When you start a co-authoring session any changes made to file are 'synched' with One Drive
B. You can start to co-author more than one document at a time
C. If another person has already started a co-authoring session the file will show it is 'locked' and another person only has the option to 'Join' co-authoring session.

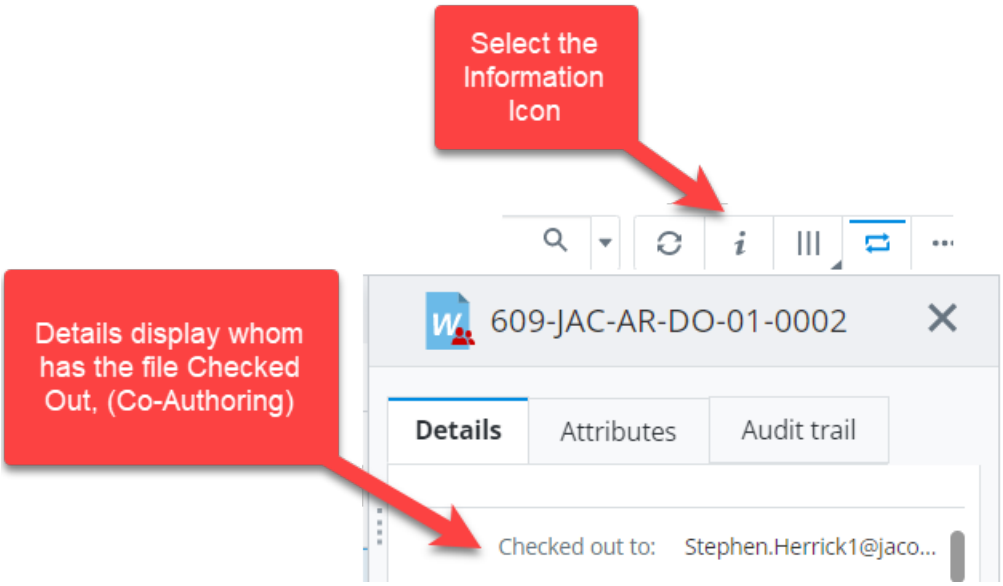
**ATTENTION:** Note the 'Autosave' button should automatically be 'On' at the top left hand side of your document when you are co-authoring a document. If 'Autosave' button is off, make sure it is on.

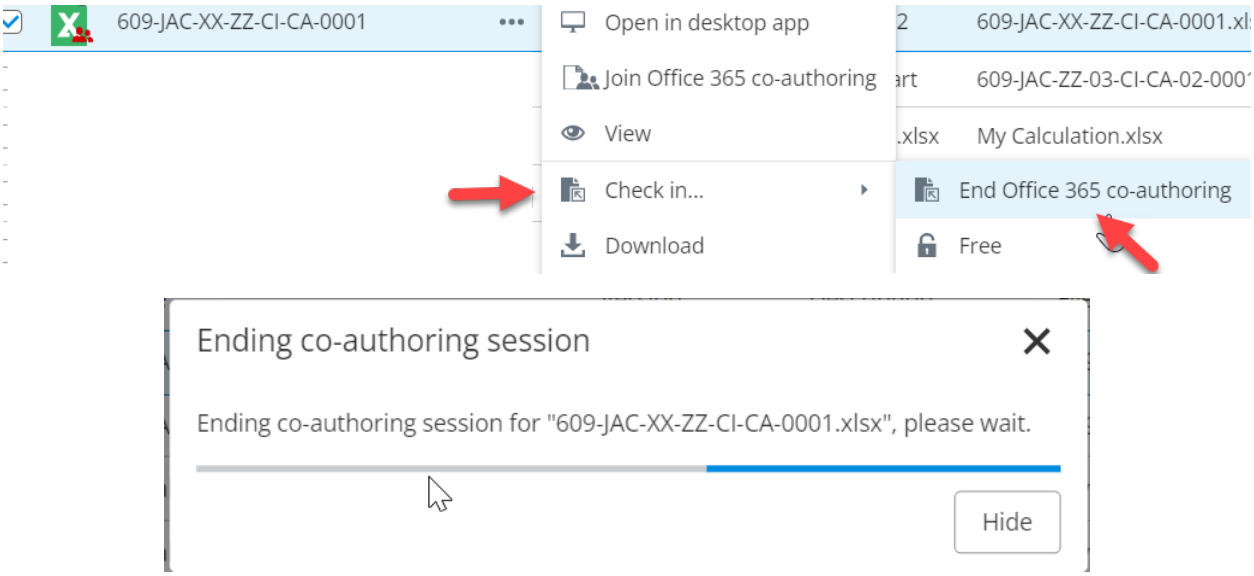
## Joining a co-authoring session

To join a co-authoring session that is already in progress (or re-open an Office document that you were co-authoring but had closed), click the check box next to a document that is currently checked out for co-authoring and select Open > Join Office 365 co-authoring.

## Ending a co-authoring session

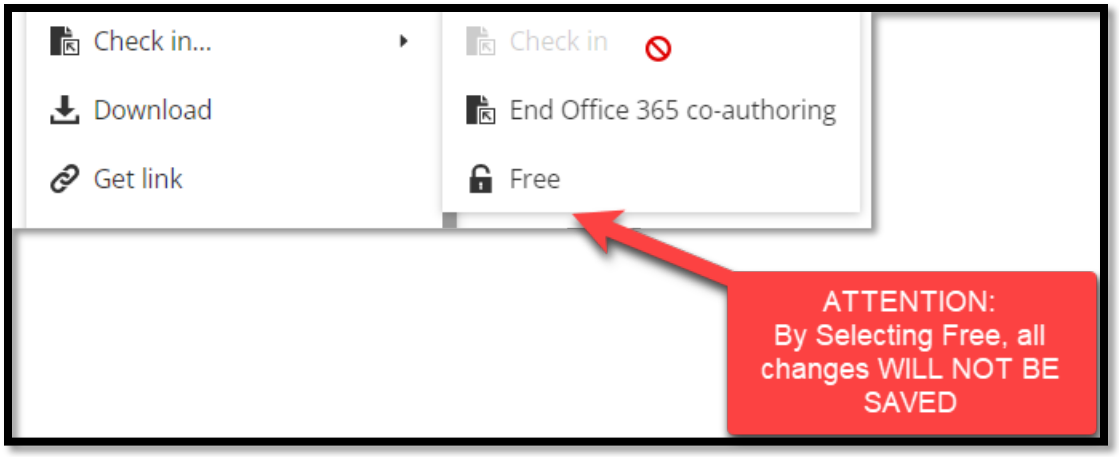
Only the user that started a Co-Authoring session can End the Co-Authoring session. The file property will be set as Checked Out and denoted with the user information who started the Co-Authoring session. See Image below




## Cancelling a co-authoring session

To cancel a co-authoring session (and discard all the changes made during the co-authoring session), click the check box next to the document and select Check In > Free (the same way you would typically undo a complete checkout).




# PDF VIEW and Authoring

## Bluebeam Workflows within ProjectWise web and ProjectWise Drive:

**PRE-REQUISITES:**

1. The default pdf application should be Bluebeam (Link to the **Instructions**)
2. ProjectWise Drive should be installed and synchronized (Link to the instructions)

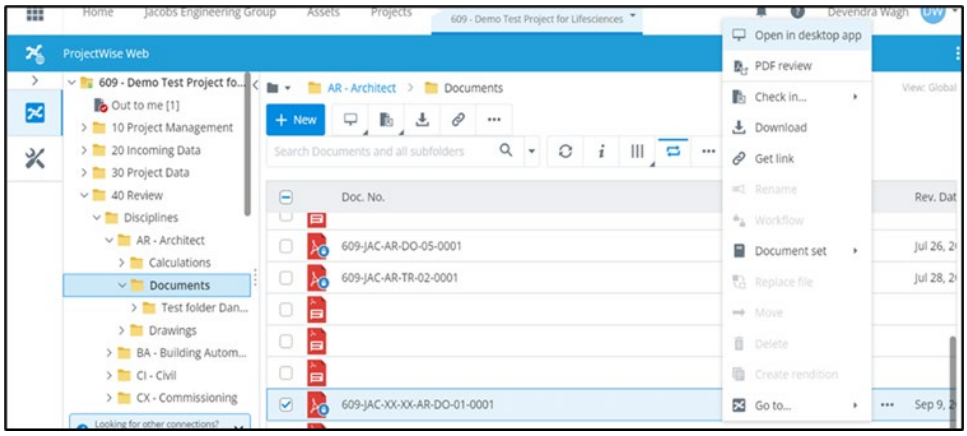
### Option 1: Open in Desktop App

**Case 1**

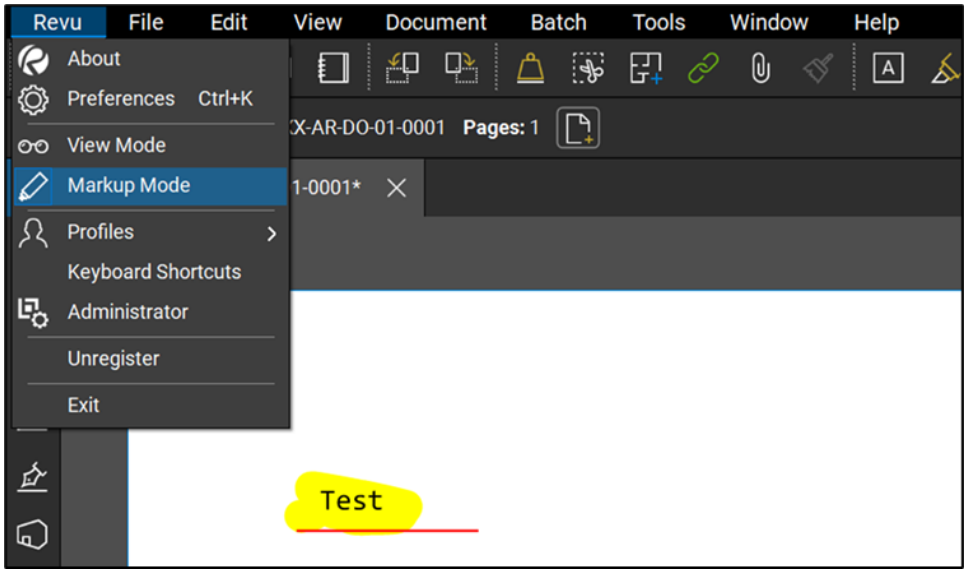
**Step 1:** Right-click on the PDF file and Open it in Desktop App

**ATTENTION**: Despite the mode selected in Bluebeam, once the file gets opened on the desktop app (Bluebeam), the status of the file in PW will change to Checked out (browser refresh required)

*Audit Trail Status – Checked Out*




**Step 2**: The file will open in Bluebeam as a View mode by default; change it to Markup mode for editing; in case you want to <u>view it,</u> refer to **Step 4**




**Step 3:** Once the changes have been done, save it and close the PDF file, and it will automatically get saved (No need to check in the file manually).

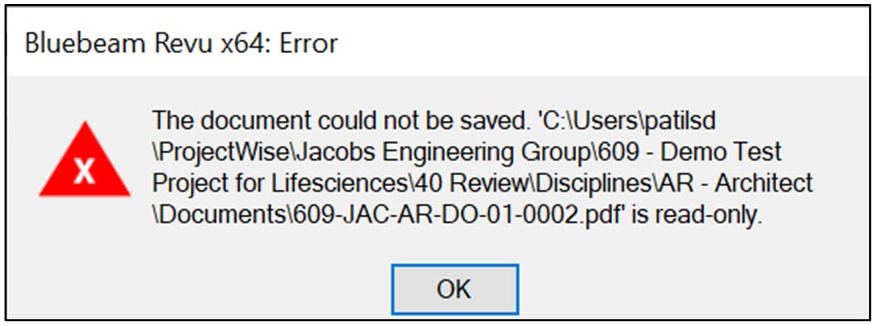
*Audit Trail Status – Checked In - Modified*

**Step 4:** If the file is closed without changing the Bluebeam mode to "Markup Mode," the file will be made accessible accordingly after closing.

*Audit Trail Status - Freed*

<u>**Case 2:** File is already open for editing on one user's machine and other person tries to open with desktop app/Checkout **a Web page Refresh**</u>

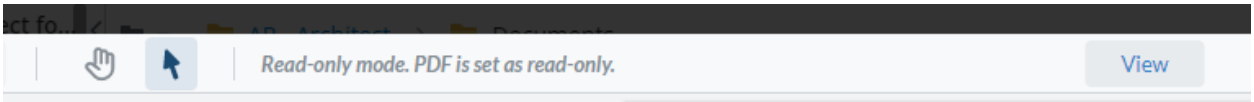
- It will give the prompt shown below when **saving the file** on Bluebeam




- W/o Web Refresh, it directly opens in ReVu but doesn't save the contents causing data loss.

**Case 3:** Combine Effect of "Open in Desktop app" and File "Double Click"

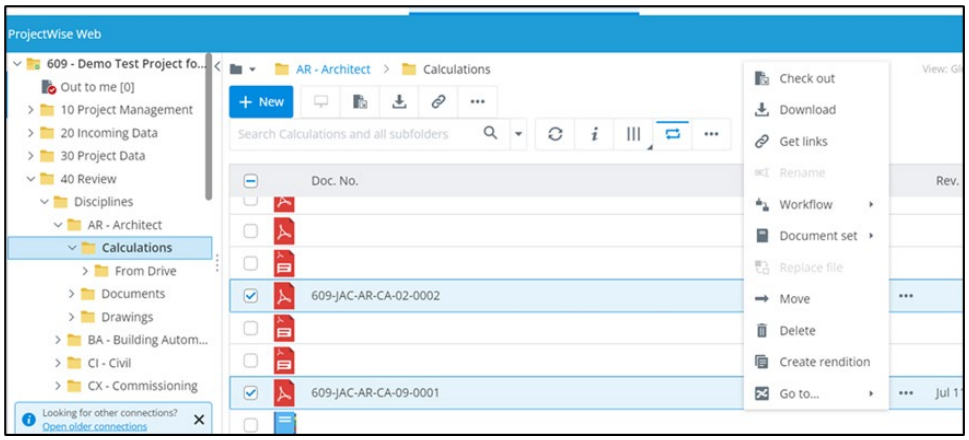
- If one user is already working on pdf file using "Open in Desktop app" and another user tries to double click the file, it will open in the PW web tab in the READ - ONLY mode itself.




**Case 4:** The user wants to edit multiple PDF files at the same time

Step 1: The user will select various files; however, the user won't see the option "Open in Desktop App" at first, but the "Check out" option

Step 2: The user can edit the Checkout tab, where the status will change to check out, but the user again needs to click on "Open in Desktop App" to work on the pdf files.




## Option 1 Takeaways

**Pros:**

1. One of the most feasible options among others, as it reduces the steps taken by a user to open any pdf for markup/editing.
2. Provides a complete audit trail for every action, including multiple user-related executions.
3. Creates a local ProjectWise drive-based backup in case of multi-user execution.

**Cons:**

1. **Web Page/PW Web refresh is highly recommended** to avoid modifications related conflicts as sometimes it may result in loss of data.
2. User will need to close Bluebeam to control Bluebeam licensing usage and cost manually.

## Option 2: File Checkout

**Case 1**: File checkout on a single user's machine

Users follow the below steps to check out a PDF file through Bluebeam

**Step 1:** Right-click or click on three dots beside the document, then click on Check Out; file status instantaneously changes to Check out.

*Audit Trail Status – Checked Out*

**Step 2:** To open the file, the user needs to click on the file and click on Open in Desktop App, where the file gets opened in Bluebeam, and Option 1 Case 1 (Steps 2 to 4) will be followed as per the requirement.

**Step 3:** For Check-in/Free the file, please navigate to the file on ProjectWise Web, select the 3 dots on the right hand side of the selected document and select the appropriate action, Check in or Free option.

**Step 4:** If the user clicks on **Free** the file will be freed in ProjectWise, and in case user clicks on Check-in then it will directly check-in the file.

*Audit Trail Status – Checked In – Modified*

*Audit Trail Status - Freed*

Observations:

- When a file is checked out from PW web, it gets instantaneously synced with PW drive & PW explorer. If you by any chance happen to check the file on PW explorer, it would show

a Padlock instead of Red Check & no documents will appear in the Local Document Organizer under the Checked out documents tab since the locations are different.

**Case 2**: File Check out by two or more users at the same time

- Gets checked out to the user who clicks first; other users get the below error

## Option 2 Takeaways

**Pros:**

1. Checkout action instantly locks the files for others, resulting in fewer conflicts.
2. Provides a complete audit trail for every action with complete traceability of documents.
3. We observed that after installing the latest version of PW Drive (2023.1.100), the file gets Checked-in directly in PW Web without asking for the file location to be navigated manually. Since it checks in the file directly hence the issue of selecting a wrong file while check-in & incur data loss has been resolved, which now makes it the most feasible option amongst the others.

**Cons:**

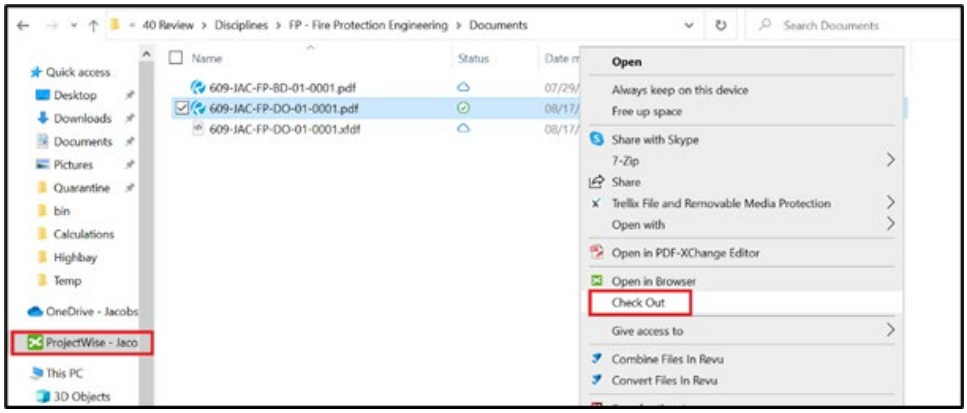
1. Additional step of "Open in desktop App" is required to open the file after selecting it for Check out.
2. Not feasible for multiple file checkouts as the user needs to open each file individually with the "Open in Desktop" App even after checkout.

## Option 3: ProjectWise Drive Checkout

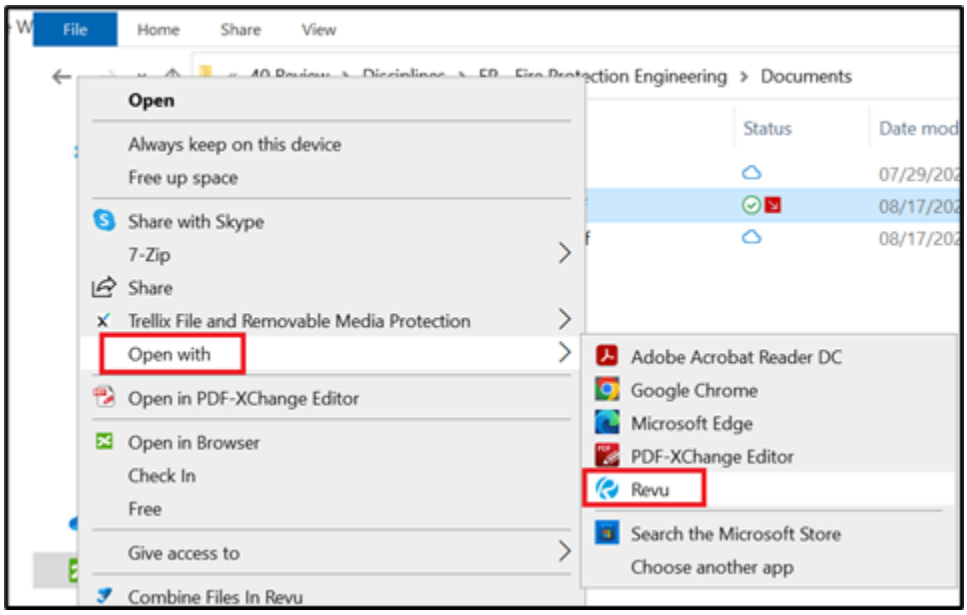
**Case 1:** Normal Check out process

**Step 1:** Open projects drive, navigate to the document, Right click on it and check out, which further changes the status to check out on drive; however, in explorer & ProjectWise, we need to refresh.

*Audit Trail Status – Checked Out*

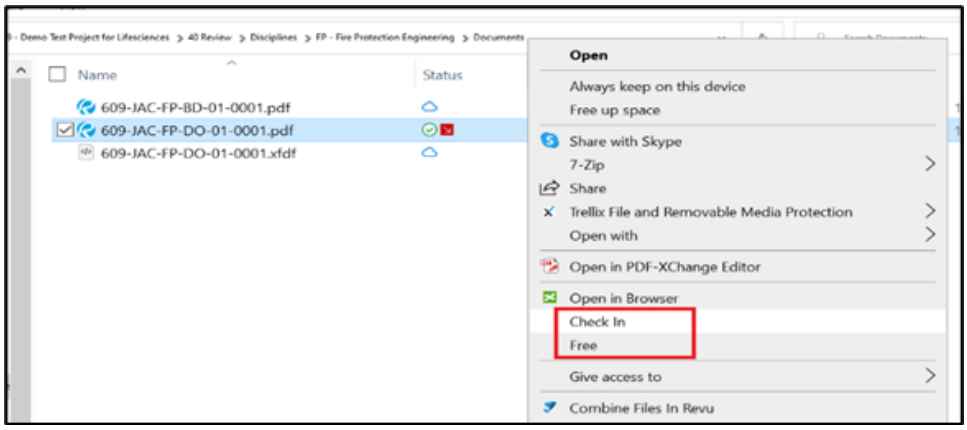



**Step 2:** Further, the user needs to double-click to open it in Bluebeam or right-click on the document and use "open with" option




**Step 3:** The file will open in Bluebeam as a View mode by default, change it Markup mode for editing Same Procedure will follow as mentioned in Option 1, Case 1. Steps 2 to 4

**Step 4**: If you want to free or check the file, you need to navigate to the file right click and take further action to Free or Check-in.




**Case 2:** Double Clicking the file

**Step 1:** Double-clicking the file or Open with options will directly check out the file in Bluebeam.

**Step 2:** In case of user wants to modify, then the mode needs to be changed to Markup mode, do the modification, save, and close the file; this action will automatically check in the file.

**Step 3:** If the user opens it, continues with View mode, and closes it directly, the file will get freed automatically.

**Case 3:** Multiple File Checkout

- Follows the same observations as the PW Web case

## Option 3 Takeaways

**Pros:**

1. Checkout action instantly locks the files for others, resulting in lesser conflicts

**Cons:**

1. Additional step of "double click" or "open with" is required to open the file after selecting it for Check out
2. Not feasible for multiple file checkouts as the user needs to open each file individually with the "double click" App even after checkout, and the same follows for check-in

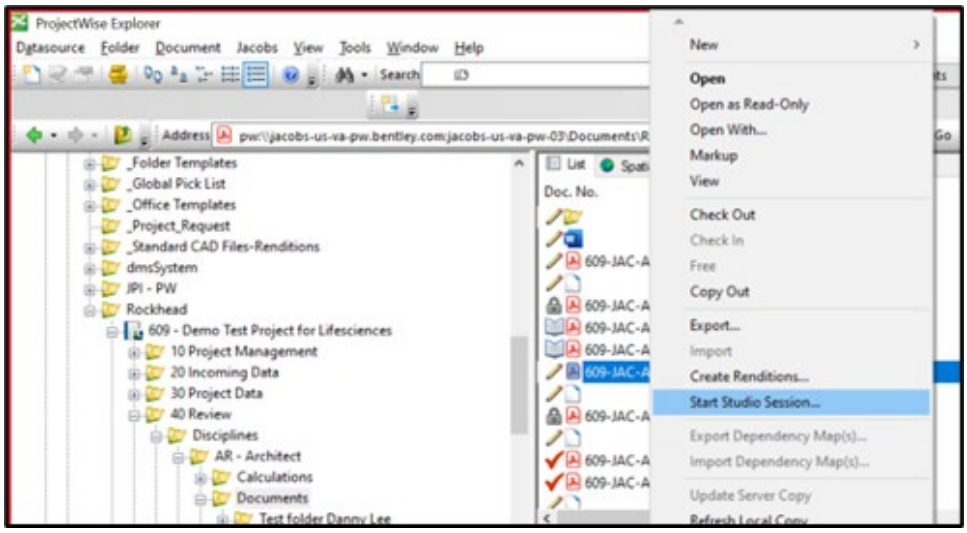
## Option 4: PW Explorer, PW Drive – Create Session

**ProjectWise Explorer:**

**Case 1:** Start a new Studio Session using a ProjectWise file from within ProjectWise.

**(Make sure that ProjectWise integration is enabled within the Bluebeam Administrator).**

**Step 1:** Right-click the desired file within ProjectWise and select Start Studio Session.



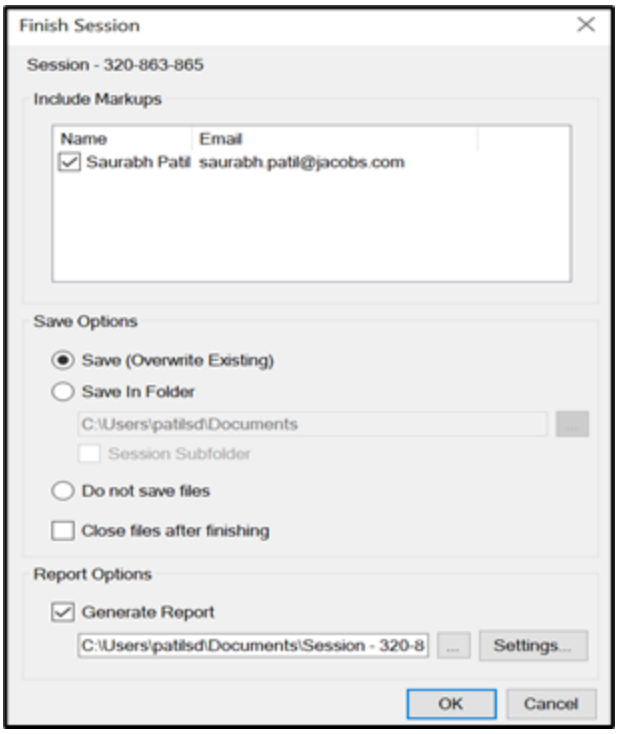

**Step 2:** If you are not logged into the ProjectWise Data source within Revu, you will be prompted to do so.

**Step 3:** The Start Studio Session dialog box appears. See Starting a New Session instructions for more information about starting Studio Sessions.

**Step 4:** This process will start a new Studio Session using the selected ProjectWise file. Which can be further shared with Reviewers and Approvers for further review on Bluebeam. ProjectWise files will change their status to check out.

**Step 5:** After completing the review, documents can be further uploaded to ProjectWise. For this, the session owner will finish the session by selecting the **"Save (Overwrite Existing)"** option.

- After completing the process, the reviewed document will open in Bluebeam.
- Close the file, which will further provide the option to Check in on Projects



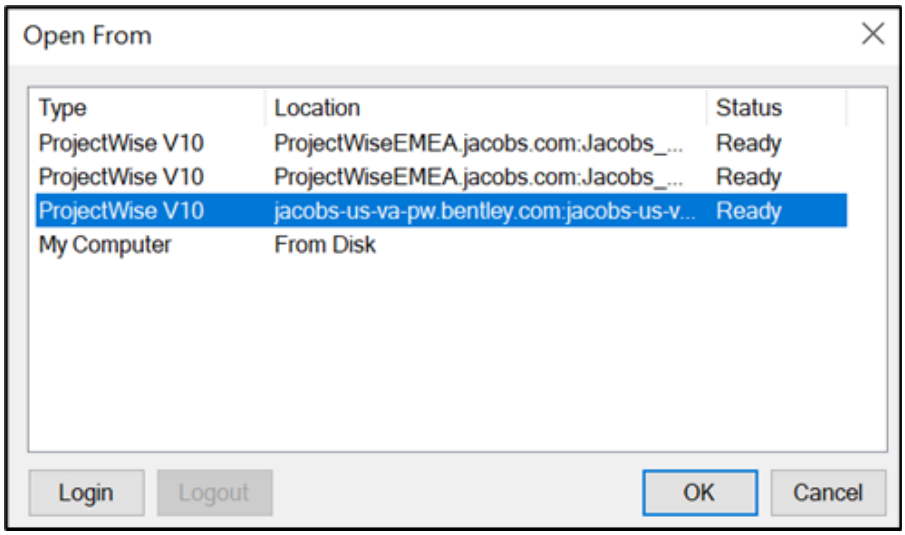

**Case 2:** Adding files to the existing session from ProjectWise

**Step 1:** Open Bluebeam and log in to the studio server. Change Bluebeam mode from View mode to Markup mode.

**Step 2:** Create a new session (instructions) in Bluebeam or Log in to the existing desired Session.

**Step 3:** Click Add File in the Documents section of the Studio panel.

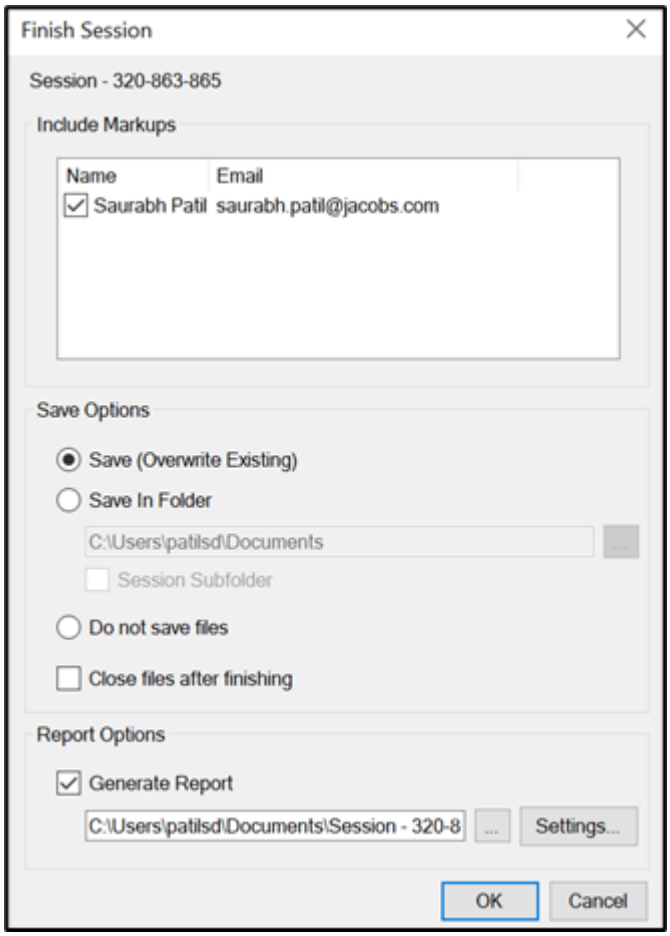
- Select the respective integrated data source on Bluebeam, then navigate and open the required files.



**Step 4:** This process will add selected documents to the associated session. Which can be further shared with Reviewers and Approvers for further review on Bluebeam.

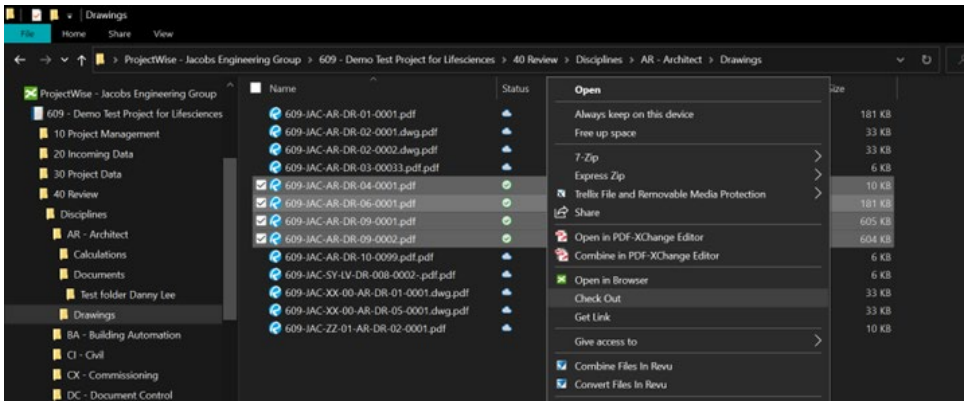
**Step 5:** After the review, documents can be further uploaded to ProjectWise. For this session, the owner will finish the session by selecting the **"Save (Overwrite Existing)"** option.

- After completing the process, the reviewed document will open in Bluebeam.
- Close the file, which will further provide the option to Check in on Projects



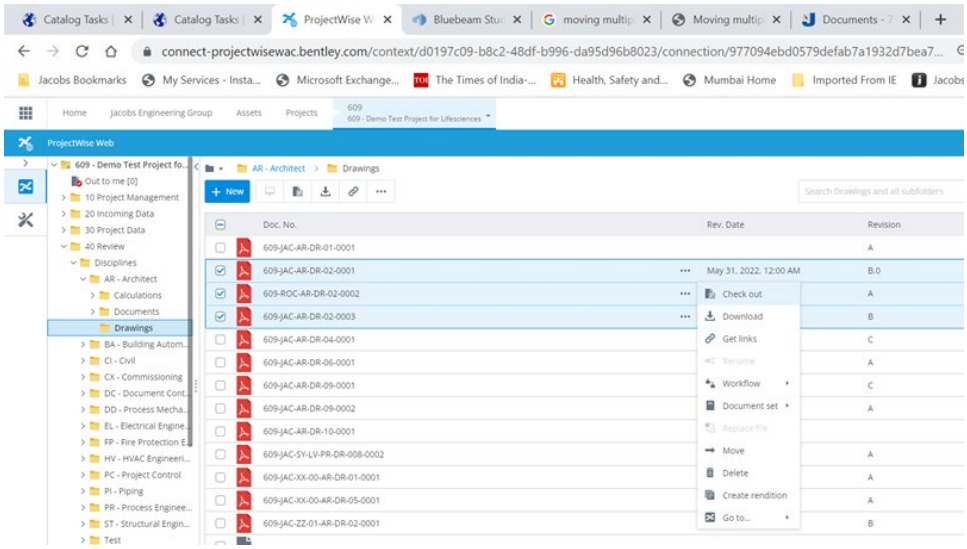

**ProjectWise Drive & ProjectWise Web:**

**Step 1(i):** For Projects Drive, Select the required one or multiple documents, right click and click on Check out; Status of those documents will instantaneously change to Check-out




**Step 1 (ii):** For ProjectWise Web, Select the required one or multiple documents, right-click, and click on Check-out Status of those documents will instantaneously change to Check-out.

**** ATTENTION:** For the addition of the documents to Bluebeam Session, the user would need to navigate to the respective **ProjectWise Drive** location in both cases of Step 1(i) or Step 1(ii)

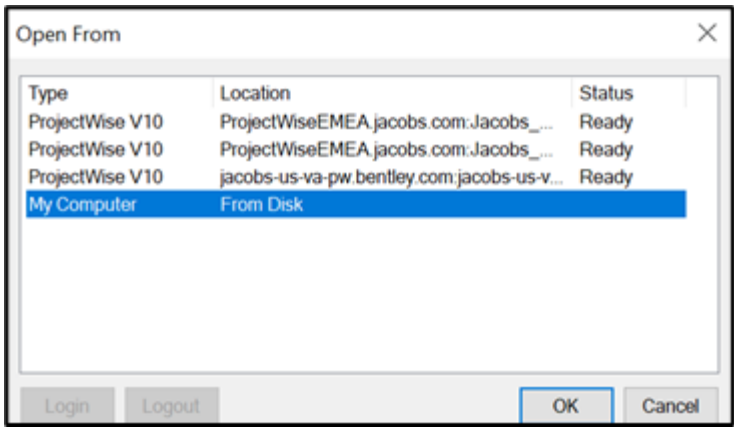



**Step 2:** Open Bluebeam and log in to the studio server. Change Bluebeam mode from View mode to Markup mode.

**Step 3:** Create a new session (instructions) in Bluebeam or Log in to the existing desired Session.

**Step 4:** Click Add File in the Documents section of the Studio panel.

- Select the My Computer option on the "Open From" dialogue box, then navigate to the respective folder on ProjectWise Drive

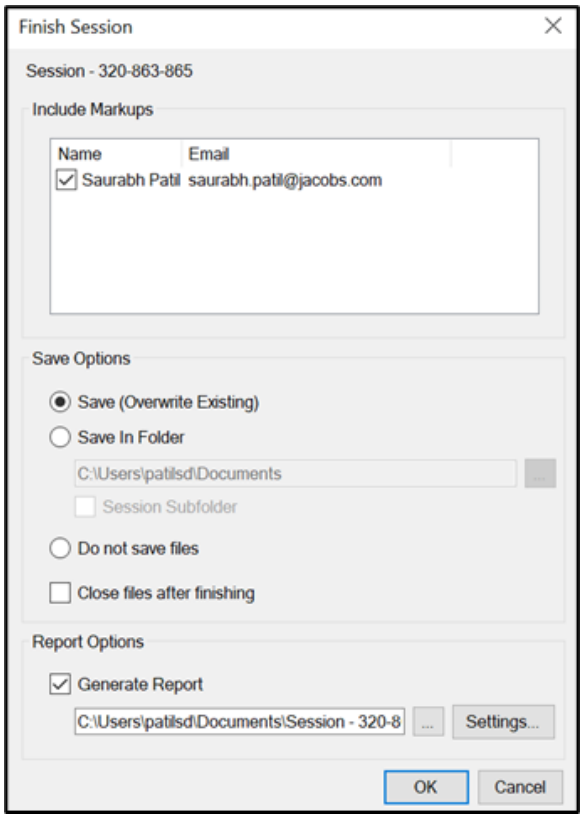



**Step 5:** Select the required documents from ProjectWise Drive and click on Open to get them added to the required session.

**Step 6:** The session can be further shared with Reviewers, Approvers, or external members for further review on Bluebeam.

**Step 7:** After the review, documents can be additionally uploaded back to ProjectWise. For this session, another winner will finish the session by selecting the **"Save (Overwrite Existing)"** option

- After completing the process, the reviewed document will open in Bluebeam.
- Close the file, then navigate back to ProjectWise Drive or ProjectWise Web location, and right-click the document to Check-in.



### Option 4 Takeaways

**Pros:**

1. This will reduce the licensing overload for the Bluebeam application, which eventually reduces the financial burden w.r.t licensing cost
2. Normally, check prints, viz pdf copies, are further sent for review, which will be further reviewed using the above 3 options; once done at the first level based on Review–approval in CRAV it will be sent for further Approval, who will again use the above option to perform the review. To minimize this delay in the multistage review cycle, it can be accomplished in one go using the above "Studio-Session" option
3. Adding internal and external users to this activity allows more flexibility.
4. Precise auditable process and error-free execution

**Cons:**

1. Signer, Checker, and doc control personnel will have total control over sending the specific PDF files for review in the Bluebeam session

## Opening General Documents (Non-Office or PDFs)

Document types other than office and PDFs (when using Bluebeam) require the user to manually check the file back into ProjectWise when using the option Open in Desktop applications. The reason is that document types are managed differently within the PC operating system.

For example, the following options are available when opening a file type of .txt.

### Option 1: Open in Desktop App

**Case 1:** Normal Operation –> Right Click -> Open in Desktop App

**Step 1:** Right-click on the file and Open it in Desktop App

*Audit Trail Status – Checked Out*

Option 2: Open

# Documents Sets – Usage

What is document set?

A document set (also called a flat set) is a group of documents manually added to a container (the set), usually for some purpose, such as simplifying the downloading of multiple documents in different folders. For example, when you download the set, all documents get downloaded.

How can I work with document set?

When you click the action menu next to a document set, you will see all the options available for working with the set. When you have a document set open, you can click the action menu for any document in the set and perform actions on them just as you would from the document's parent folder.

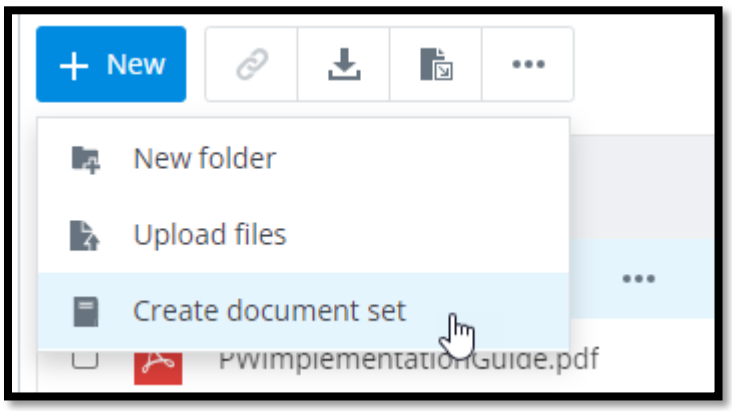
Set structure

A set can contain one or more documents, and the documents in a set can exist in different folders. A document can be added to as many sets as you want.

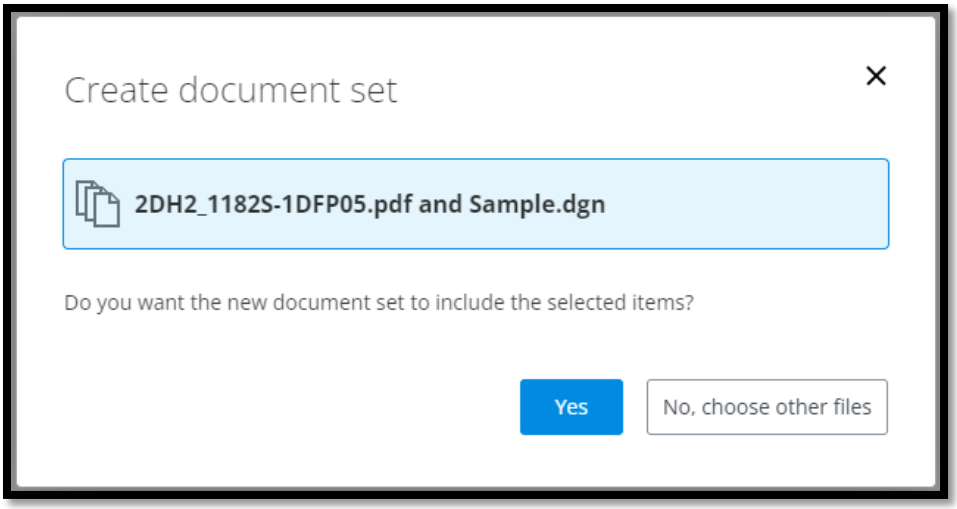
## Creating a document set

To create a new document set and then add documents to it:

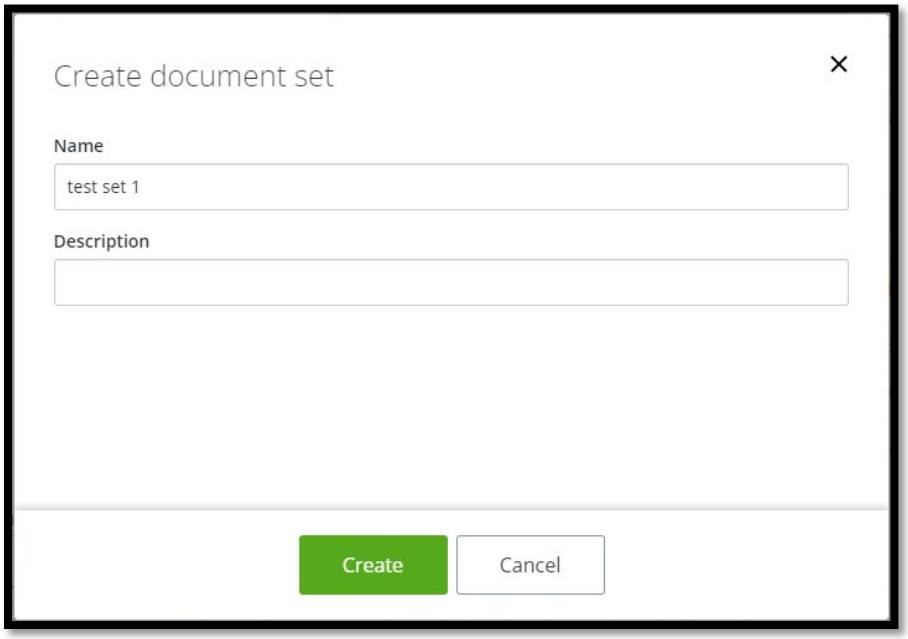
1. Click the New button and then select Create document set.




2. If you had one or more documents pre-selected by mistake, click No, and choose other files in the Create document set dialog.

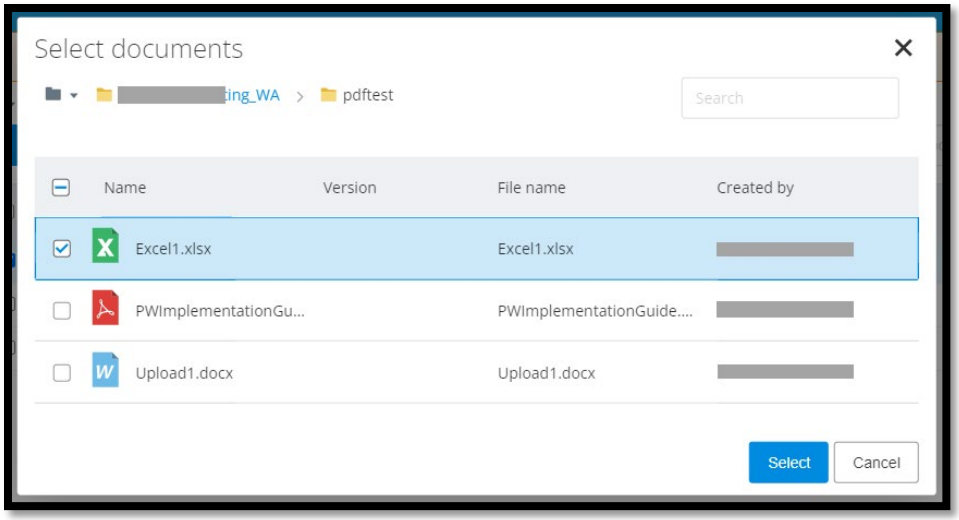



3. In the Create document set dialog, enter a name and optional description for the new document set and click Create.




Suppose the folder you are creating the document set in has a ProjectWise environment assigned to it, in addition to the name and description. In that case, the Create document set dialog will also let you fill out document code (if document code is configured for that environment) and environment attributes.

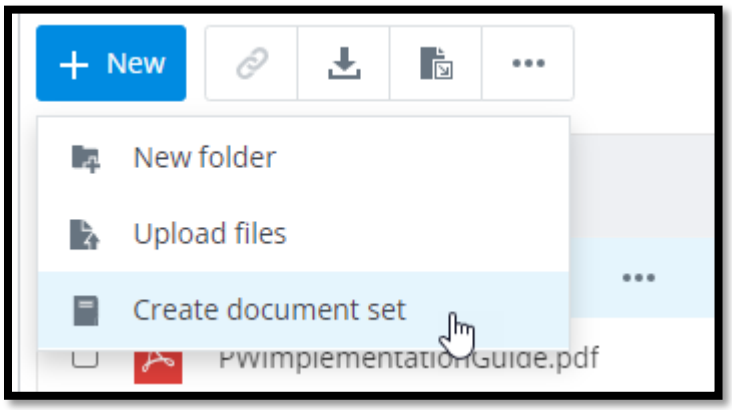
4. In the Select documents dialog, click the folder path above the document list to navigate to the folder that contains the document or documents you want to add to the set, then click the check box next to each of those documents and click Select.



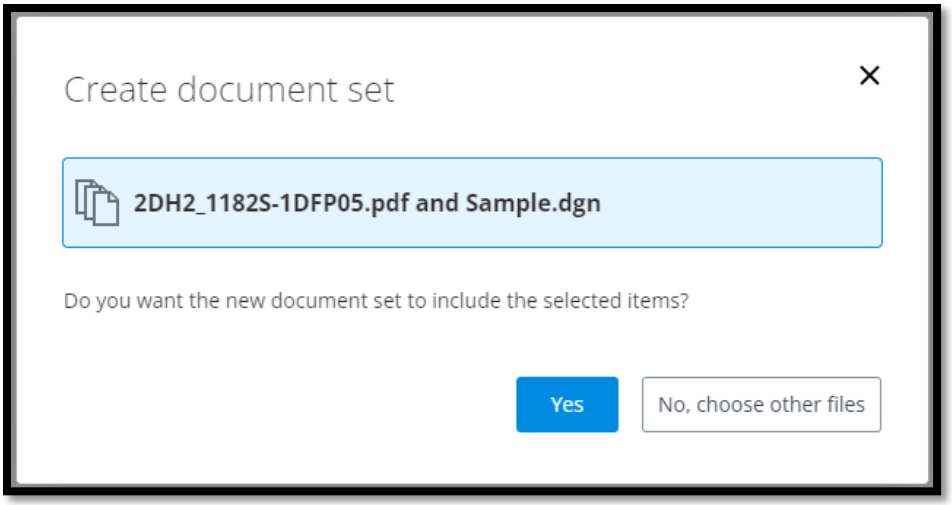

The documents are added to the set.

To create a new document set from pre-selected documents:

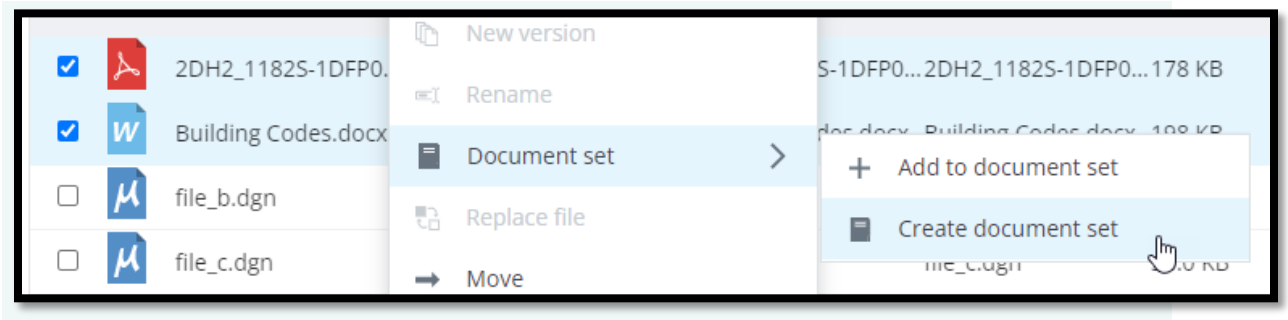
1. Select one or more documents, click the New button, and select Create document set.



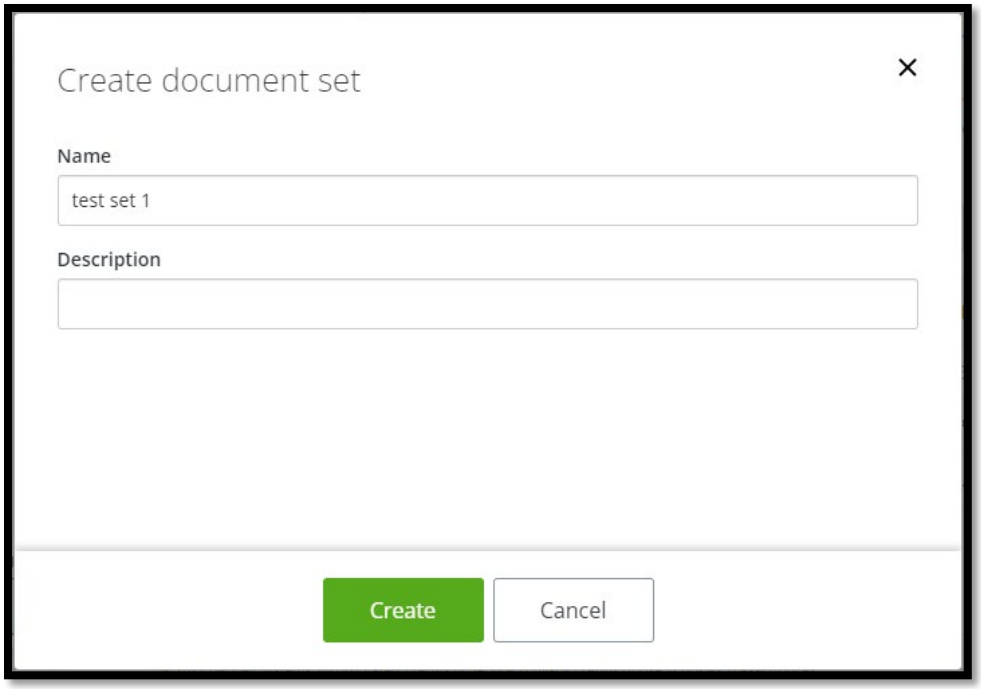

2. In the Create document set dialog, click Yes to confirm that you want the new set to include the pre-selected documents.




**ATTENTION**: Select one or more documents in a folder and then select Document Set > Create document set from the document's action menu. When you create a set this way, the new set is created with the pre-selected documents automatically added to the set (you are not prompted to confirm or select other files).




3. In the Create document set dialog, enter a name and optional description for the new document set and click Create.

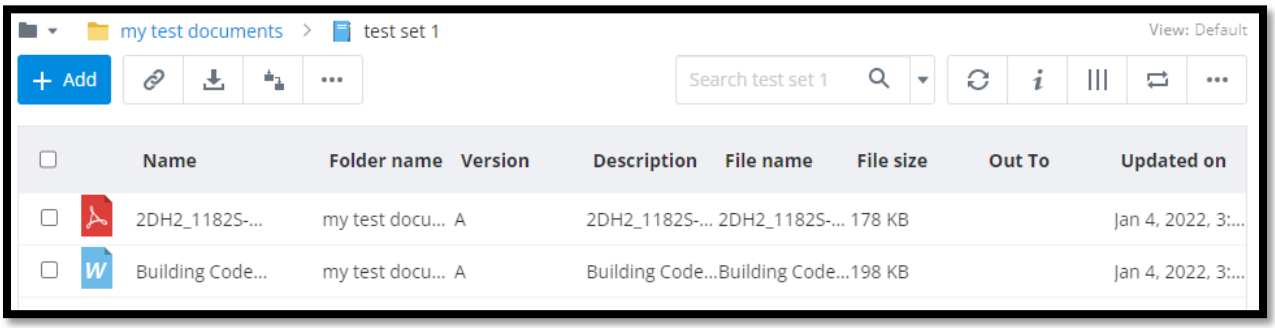



Suppose the folder you are creating the document set in has a ProjectWise environment assigned to it, in addition to the name and description. In that case,
the Create document set dialog will also let you fill out the document code (if the document code is configured for that environment) and environment attributes.

**ATTENTION**: If you close an empty document set before adding documents, the set will not be saved to ProjectWise. Once the last document is removed from a document set, the empty set is automatically deleted.

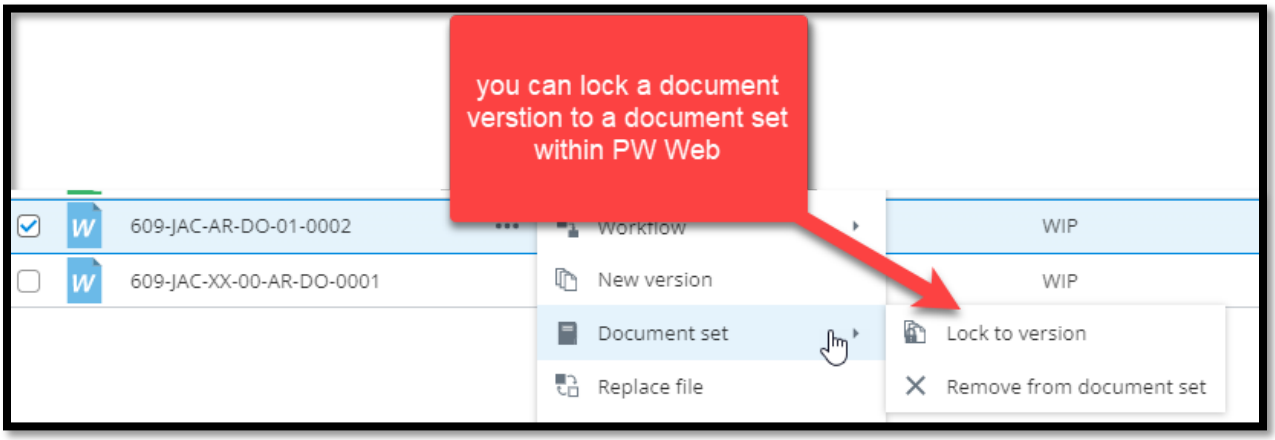
## Opening a document set

You open a document set in ProjectWise Web with a single click, just like opening a folder.
The document list displays a list of documents contained in the set.



## Locking the version of a document used in the document set

The Lock to-version setting determines which version of a document will be included in the set.

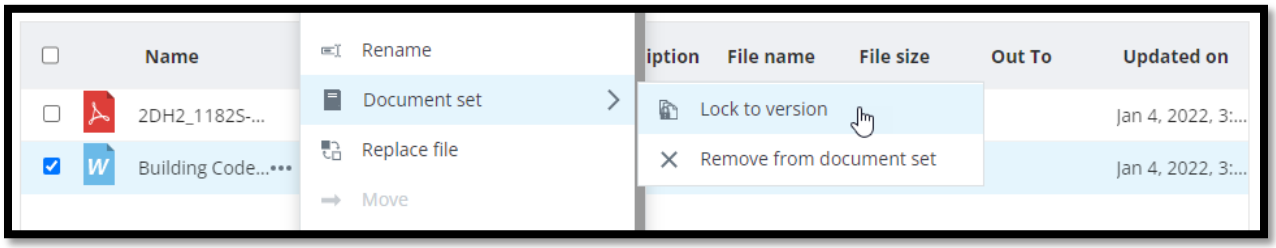



To use this feature:

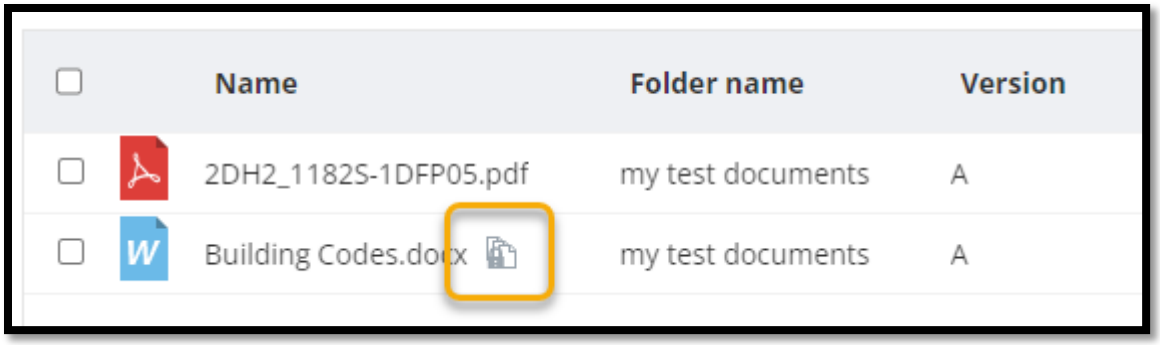
1. Add the active version of a document to a document set.

**ATTENTION**: This setting does not apply to non-active versions that get added to the set. When you add the non-active version of a document, the setting is disabled and cannot be turned on.

2. Open the set and select Document set > Lock to version from the document's action menu.




The Lock to version icon displays next to this document in the set.




When you add the active version of a document to the set and turn this setting ON for that document, then the set becomes locked to the specific version of the document that you added to the set (it locks to the sequence number of the version), so that as new versions of the document are created, the set will always use a specific version of the document (the version that was the active version when the setting was turned on).

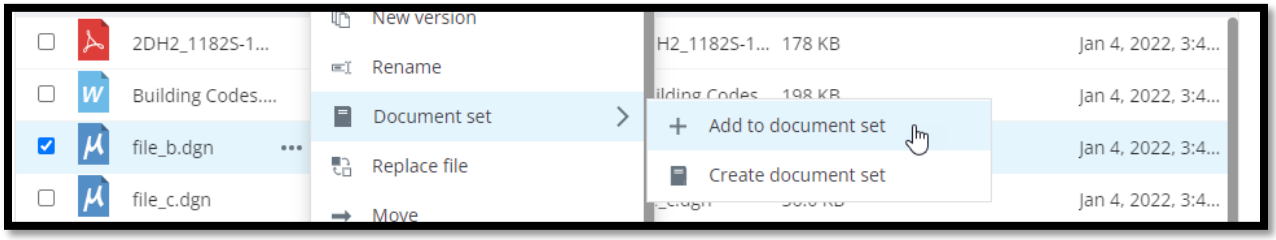
When you add the active version of a document to the set and turn this setting OFF for that document, then the set will always include the active version of that document, even as new versions of the document are created.

**ATTENTION**: Whether the setting is on or off by default after you add a document to the set depends on whether the data source setting Versions > Lock flat set documents to versions has been turned on or off by your administrator (this is configured in ProjectWise Administrator).

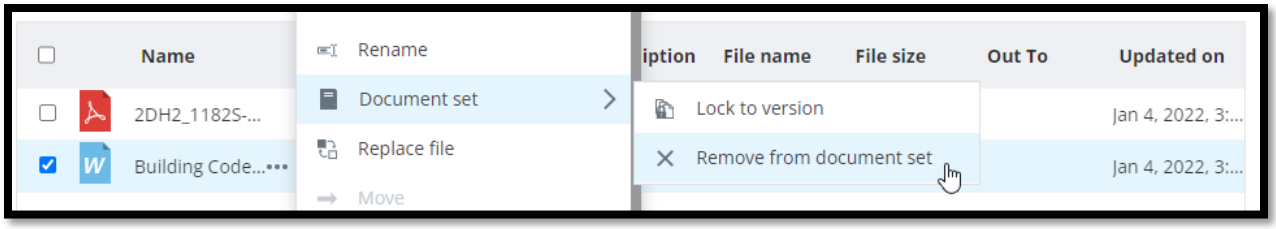
## Adding and removing documents to a document set

Once a set has been created, you can add more documents to it or remove documents from it as needed.

1. To add a document to a set, navigate to the folder containing the document you want to add, then select Document set > Add to document set from the document's action menu.




2. To remove documents from the set, open the set containing the document you want to remove, then select Document set > Remove from the document set from the document's action menu.

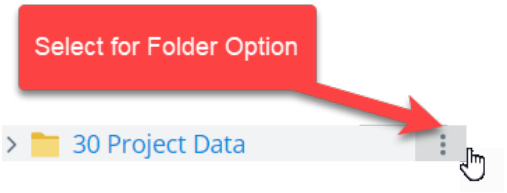


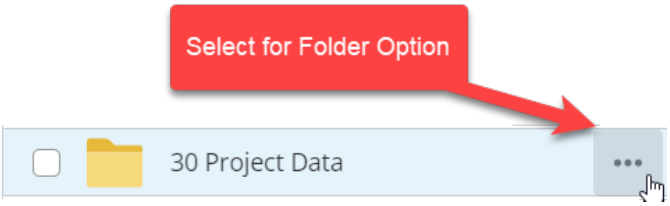

# ProjectWise Web Tools

## ProjectWise Web Tools - Folder Options

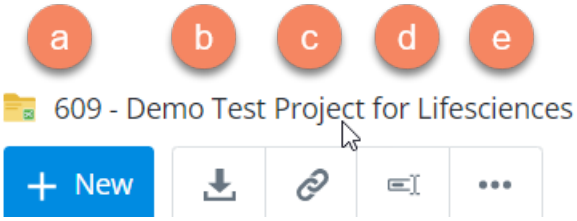
Options are available when a folder is selected. Users can either use the tools on the toolbar or use the icon "3 dots."

"3 Dot" icons

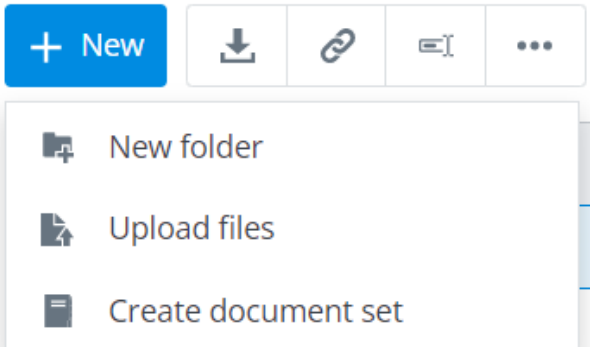



Tool Bar Options




### A - New




a. New Folder: Option available when a user can create a folder. When creating a folder, the Description is an option.

b. Upload: When selected, windows browser will open, and the user can browse and select the file(s) See Creating File section for more details
c. Create Document Set: A document set (also called a flat set) is a group of documents manually added to a container (the set), usually for some purpose, such as simplifying the downloading of multiple copies in different folders. For example, when you download the set, all records it downloaded.

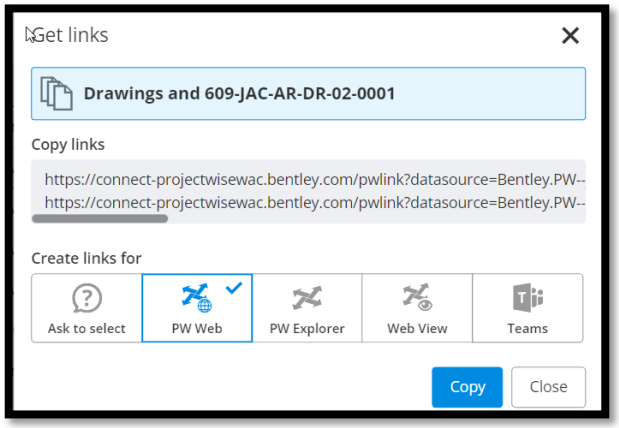
## B - Download

Users can download the objects to a network area when a file or folder is selected. Additionally, when multiple things are set to download, the zip file is created with the contents of the selected objects.

## C – Get the Link

This tool only allows a link to a single selected object, Folder, or File. When set, the user has multiple options for creating the link. The recipient must have access to the folder/file location. Otherwise, they will receive an error of "Access Denied."

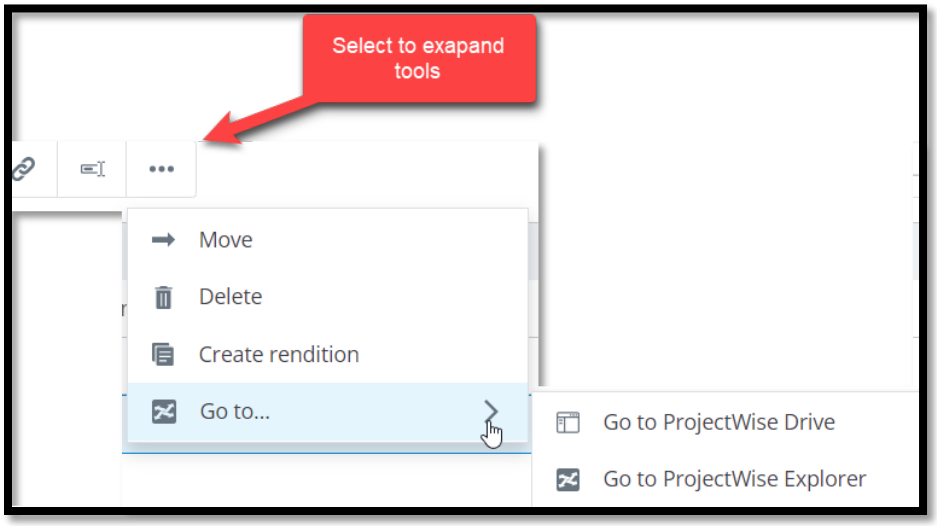
**ATTENTION**: If the link is intended for the recipient to ONLY VIEW the file, select the **Web View Option.**




## D – Rename

Allows the user to rename the Folder or File.

## E – Additional Tool Fly-Out



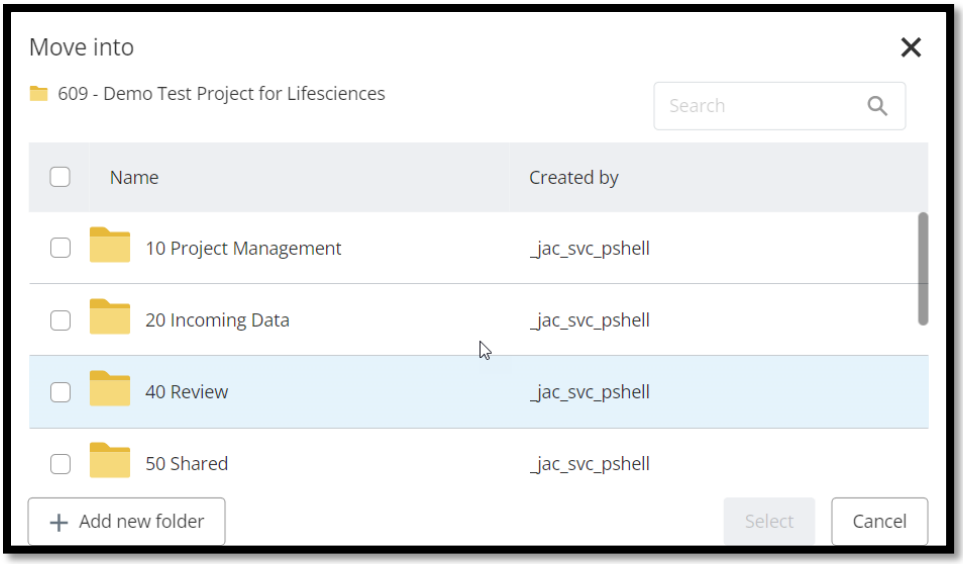

### E.1 - Move

You can move selected folders from one folder to another. You can also choose both documents and folders and move them all simultaneously.

1. Select one or more folders in a particular folder (click the check box next to each item you want to move).
2. From the action menu, select Move. The Move Into dialog opens.

   If the current folder, or any folder you navigate, has no subfolders, you will see a message that says, "No folders exist at this level." This does not mean you cannot move the items to that folder; it just means that a particular folder has no subfolders.

3. Select the folder to which you want to move the item or items.
   - To move the items to a higher-level folder, click the parent folder link (above the subfolder list) until you get to the destination parent folder you want.
   - To move the items to a lower lever folder, click a subfolder in the list until you get to the destination subfolder you want.
   - To move the items to a new folder, navigate to the folder you want, then click Add New Folder.
4. Click Move.




The selected folders are moved to the selected folder.

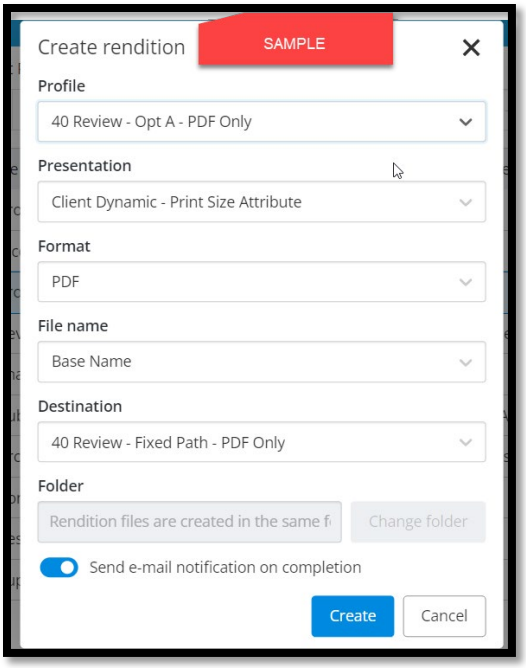
## E.2 – Delete

The ability to delete a folder is dependent on the user's access rights.
When deleting a folder, the user will be prompted for final confirmation.

## E.3 – Create Renditions

When using the Folder option to create Renditions, users must understand the content of the selected folder. For example, if the folder contains office documents, AutoCAD, and MicroStation files, the user must know what Renditions settings to choose for the required PDFR output.

**ATTENTION**: When using the option "Send e-mail notification on completion," the links within the notification are only applicable to users who have ProjectWise Explorer installed

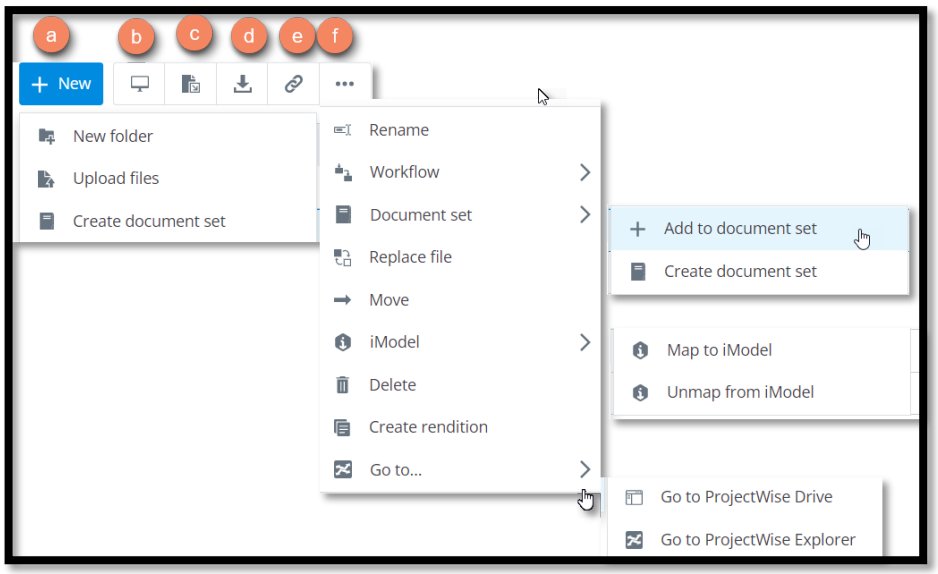



## E.4 – Go To

- Go to ProjectWise Drive: When selected and ProjectWise Drive is installed and synched, when selected, windows explorer will open, highlighting the selected folder.
- Go to ProjectWise Explorer: Only applicable if the user has ProjectWise Explorer installed; when selected, ProjectWise will open, and the folder will be highlighted.

## ProjectWise Web Tools – Document Options

Options are available when a file is selected. Additional tools are available when the user selects the "3 dots" indicated to the right of the file.




Tool Bar Options

## New

**ATTENTION:** You cannot create placeholder documents (documents with no file attached) from ProjectWise Web. Placeholder documents can only be made in ProjectWise Explorer.

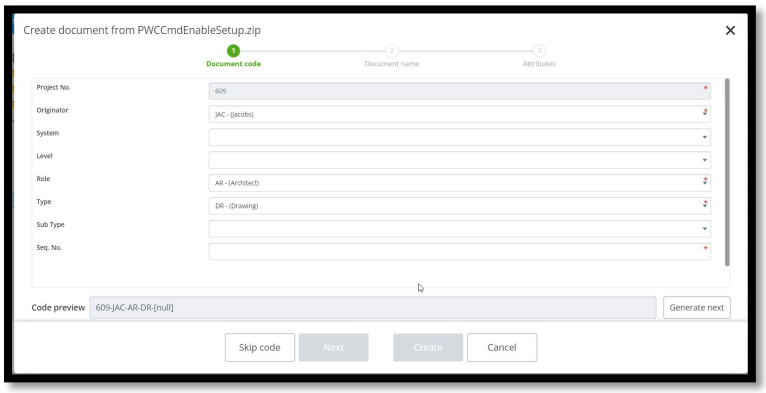
The file size that can be uploaded to ProjectWise Web is limited to 30 MB by default, and this limit can be increased or decreased as needed by the administrator of ProjectWise Web. In general, ProjectWise essentially has no file size limit (ProjectWise supports files up to 18,000,000 TB, although the file size allowed by the file server where ProjectWise documents are stored may be lower than that).

New Folder
See the Folder Tools section

## Upload files

Files can be uploaded by either selecting the Upload Files tool or by the drag-and-drop method, where the users select the destination folder, within ProjectWise Web and then specify the file from windows file explorer and drag it into the destination folder.

**ATTENTION**: If the Project is utilizing Document Codes, the user will be prompted, when creating a new file, to input in the Project defined codes; see below as an example




## Create Document Set

A document set (also called a flat set) is a group of documents manually added to a container (the set), usually for some purpose, such as simplifying the downloading of multiple documents in different folders. For example, when you download the set, all documents in the set get downloaded.

**ATTENTION**: See Section Document Sets – Usage for more information

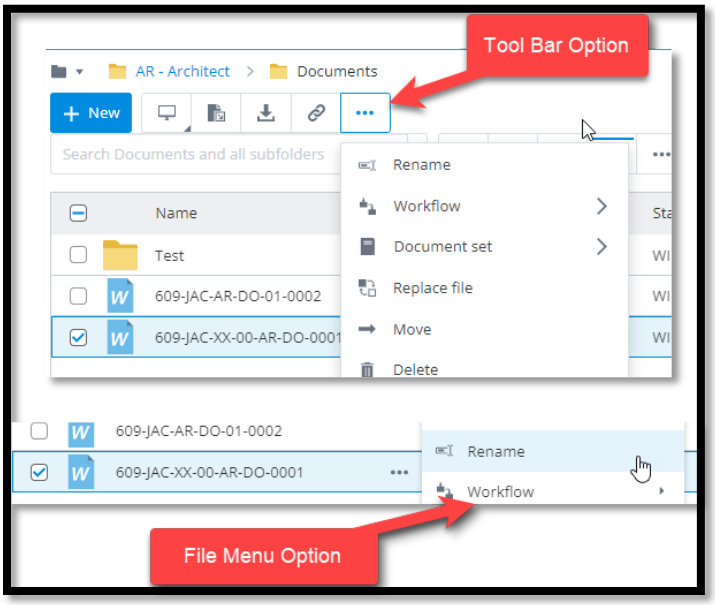
## Rename

Change document name, including version.

**ATTENTION:** Renaming the file does not change the document code when using document codes. Document Codes can only be changed within ProjectWise Explorer

Steps to rename a file

1. Click the check box next to the document you want to rename or select Rename from the toolbar option.

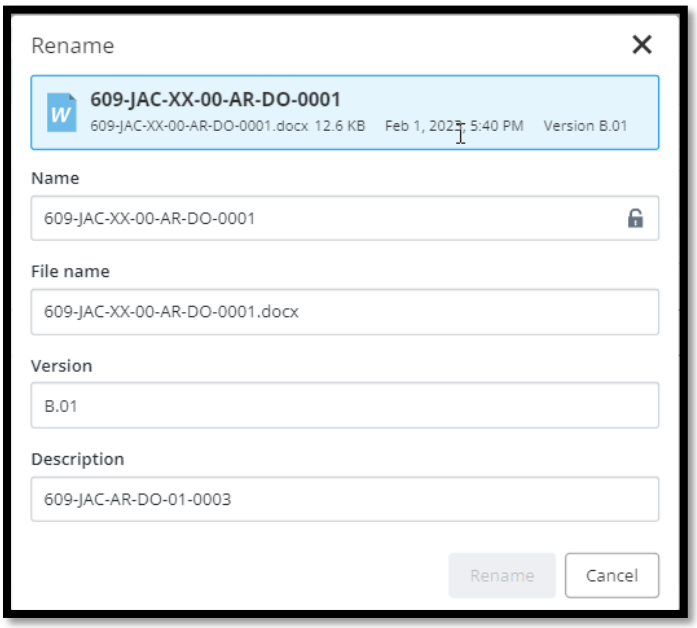



2. The dialog that opens changes the document's name and description as needed.
3. If the lock icon next to the File Name field is locked, then whatever change you make to the document name will be made to the file name. If you want the document name and file name to be different, click the lock icon to unlock the File Name field, then change the document name and file name as needed.
4. Select Rename.

## Open in Desktop App

This option will check out the selected document and open it with the file-associated application, i.e., file extension.

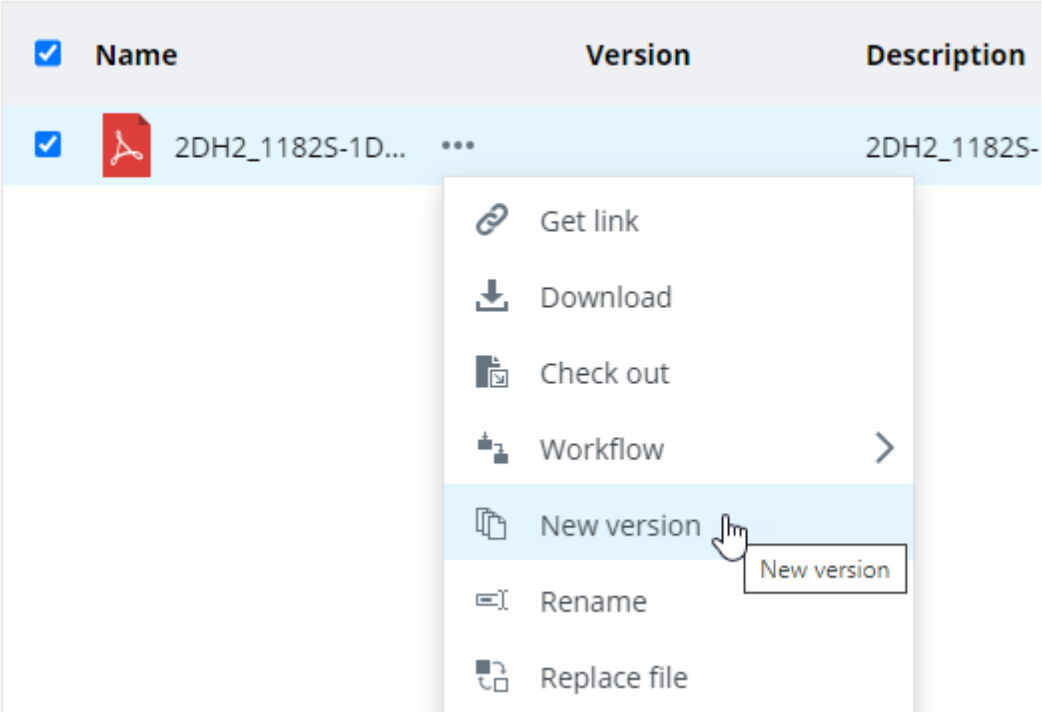
**Workflow:**



## Create a version

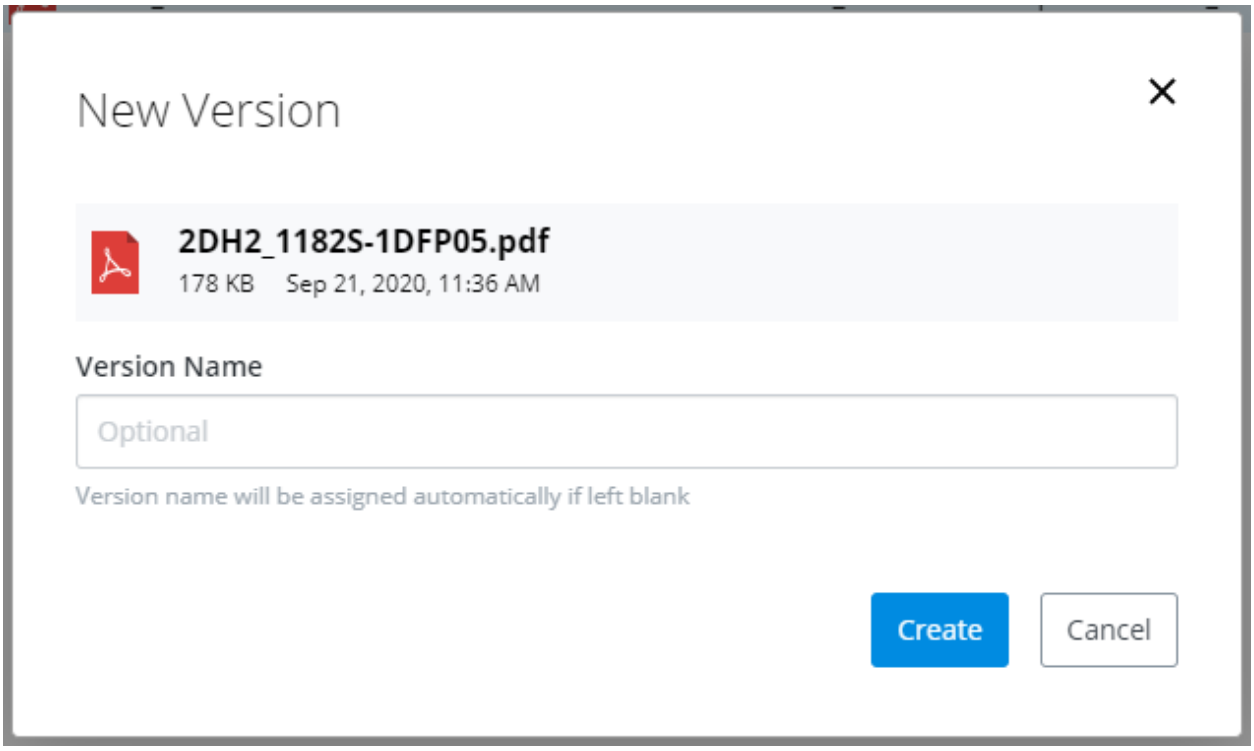
**ATTENTION:** The ability to roll0back an existing version, to be the active version is not possible in ProjectWise Web.

1. Click the check box next to the active version of a document and from the action menu select **New version**.




2. In the New Version dialog, optionally enter a custom label to identify the version in the **Version Name** field, enter an audit trail comment if required, and click **Create**.

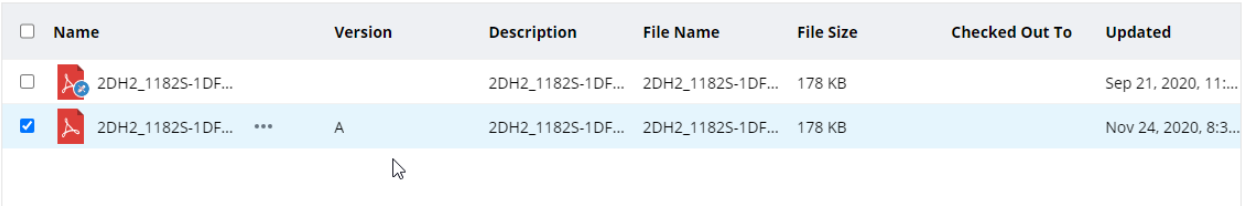
If you do not enter a custom label, a default, alpha or numeric label will be automatically assigned to the version, based on the current version labeling rules set for this data source (see Default Version Labeling Rules below).




The new version is created. If you have version display turned on, the new and old versions display together in the list. If you have version display turned off, then only the new version displays in the list.

The **Version** property column displays the label assigned to each version, whether it was the custom label you entered or the label that was automatically assigned (if you left the Version Name field blank).

In the image below, the original document has no version label at all (the **Version** property is blank), and the first new version is labelled Version A. This follows the default version labeling rules. If the administrator changes the version labeling rules, it is possible that the original document will be labelled Version A and the first new version is labelled Version B (or even Version 1 and Version 2, if numeric version labels are used).




**NOTE:** To be able to enter audit trail comments when creating a version, the user's user settings **Audit Trail > Comments > Allow for version change** and **Require where allowed** must both be on. User settings are configured in either ProjectWise Explorer or ProjectWise Administrator.

# ProjectWise Web Versioning

## How to promote an existing version to be the active version

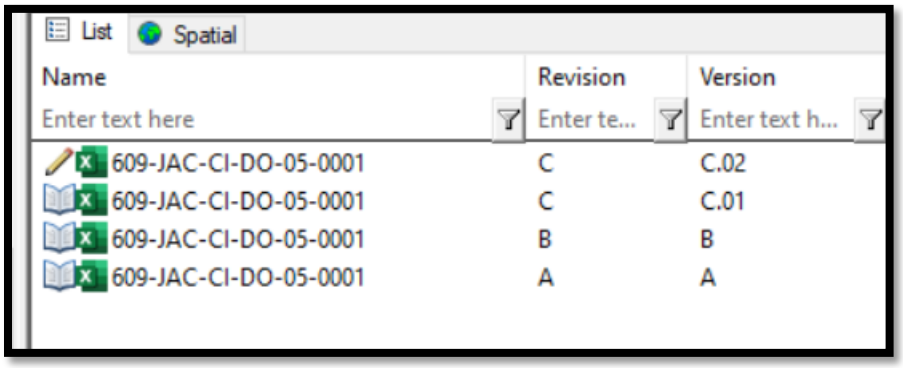
**NOTE:** Prior to any versioning the user must understand the version workflows the project has implemented, and the version nomenclature used. The below is ONLY an example of version nomenclature.

ProjectWise Web, unlike ProjectWise Explorer doesn't have the same functionality to promote an older version of the document to be promoted to the active version.

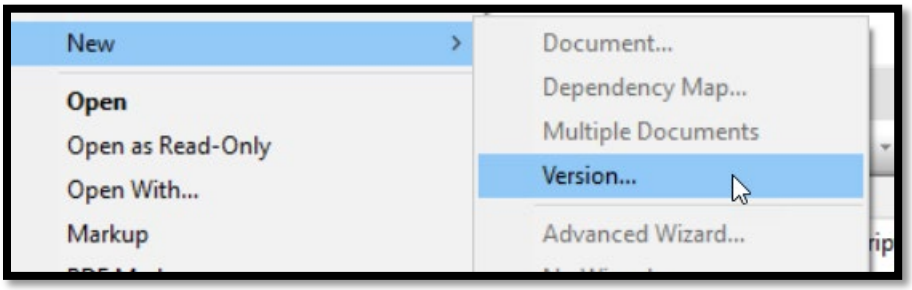
## ProjectWise Explorer steps

**NOTE:** The example below demonstrates the usage of BMS ISO19650 utilizing both ProjectWise Attribute **Revision** to only maintain the whole number and the document properties **Version** to use the minor version information.

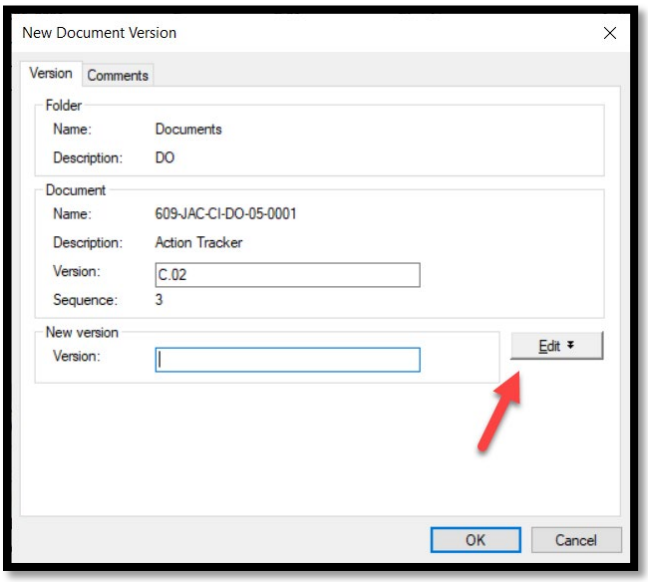
From the sample below, this exercise will promote Version A, to active Version D.02.




1. Turn on option to show all versions
2. Select the active file
3. Right-Click the file, and from the popup menu, select **New→Version**

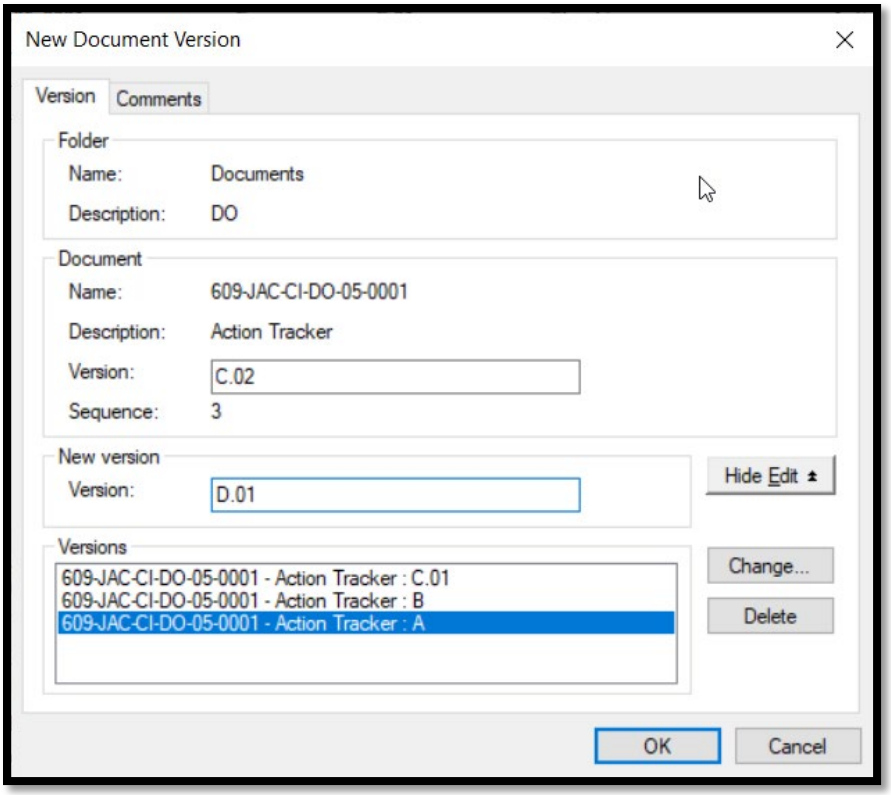


4. A dialog will open, allowing the user to select an older version, to be promoted to the active version, by selecting the older version,
5. Select the **Edit** button, the dialog will expand showing all of the versions

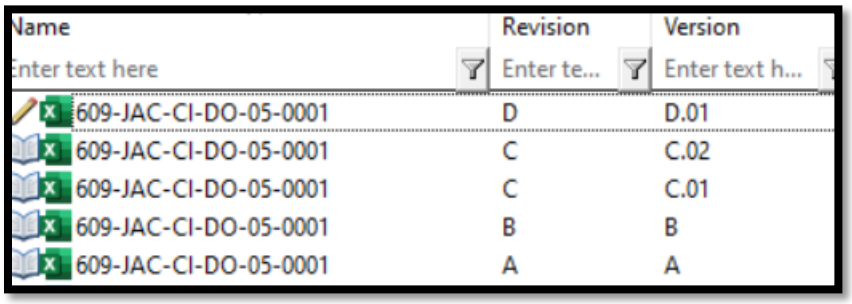



6. From the dialog the user will select a version to be promoted as the active version, once selected the user will choose the **Edit** button, and will populate the new version nomenclature.

**NOTE:** in the below example the **Version A** document will be promoted, and the next sequential version will be **D.01.**




7. To complete the operation the user will select **Change** and the results will be that the active file will be versioned, and the new active file version will be D.01, as shown below.



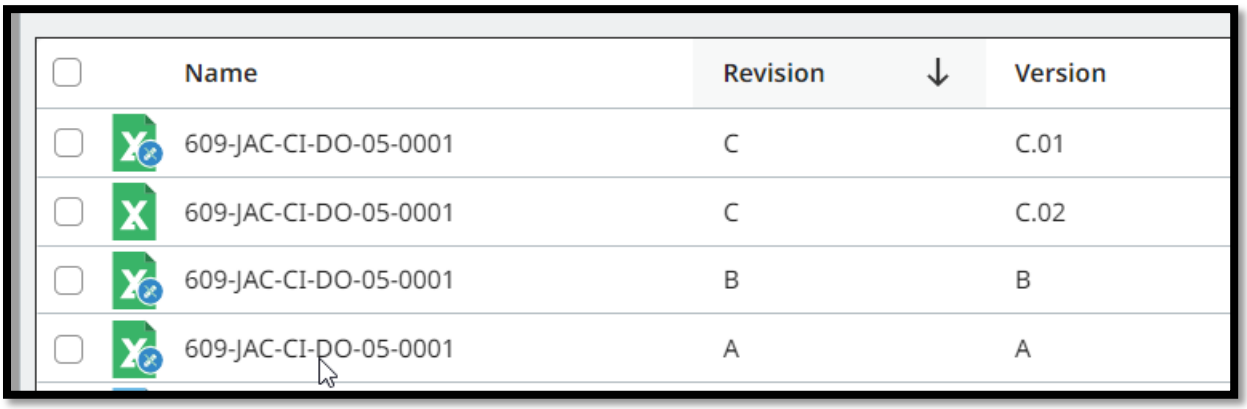
| Name | Revision | Version |
|---|---|---|
| Enter text here | Enter te... | Enter text h... |
| 609-JAC-CI-DO-05-0001 | D | D.01 |
| 609-JAC-CI-DO-05-0001 | C | C.02 |
| 609-JAC-CI-DO-05-0001 | C | C.01 |
| 609-JAC-CI-DO-05-0001 | B | B |
| 609-JAC-CI-DO-05-0001 | A | A |

## ProjectWise Web Steps

Unlike ProjectWise Explorer, ProjectWise Web doesn't have the functionality, when selecting the **Version** option, to be able to use the **Edit** option.

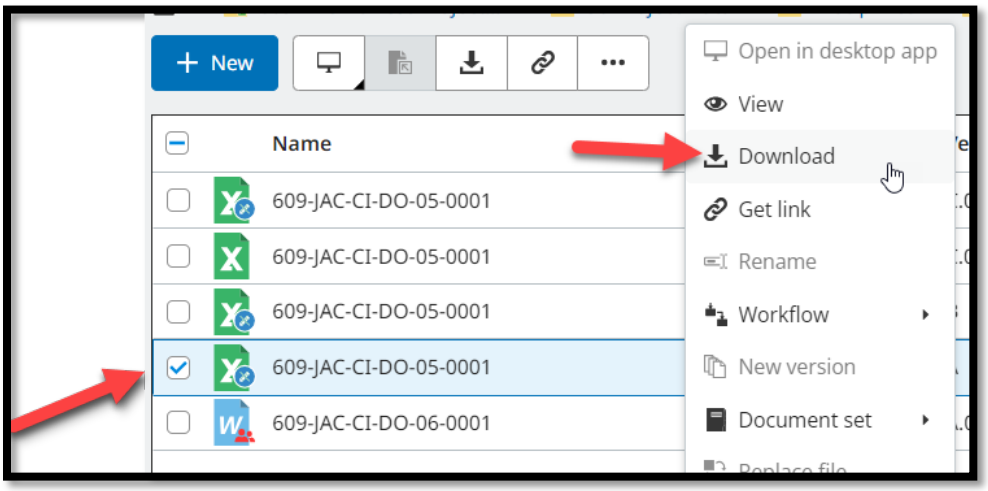
The user can still promote an older version to be the active version. See the following steps below.

From the sample below, this exercise will promote Version A, to active Version D.02.



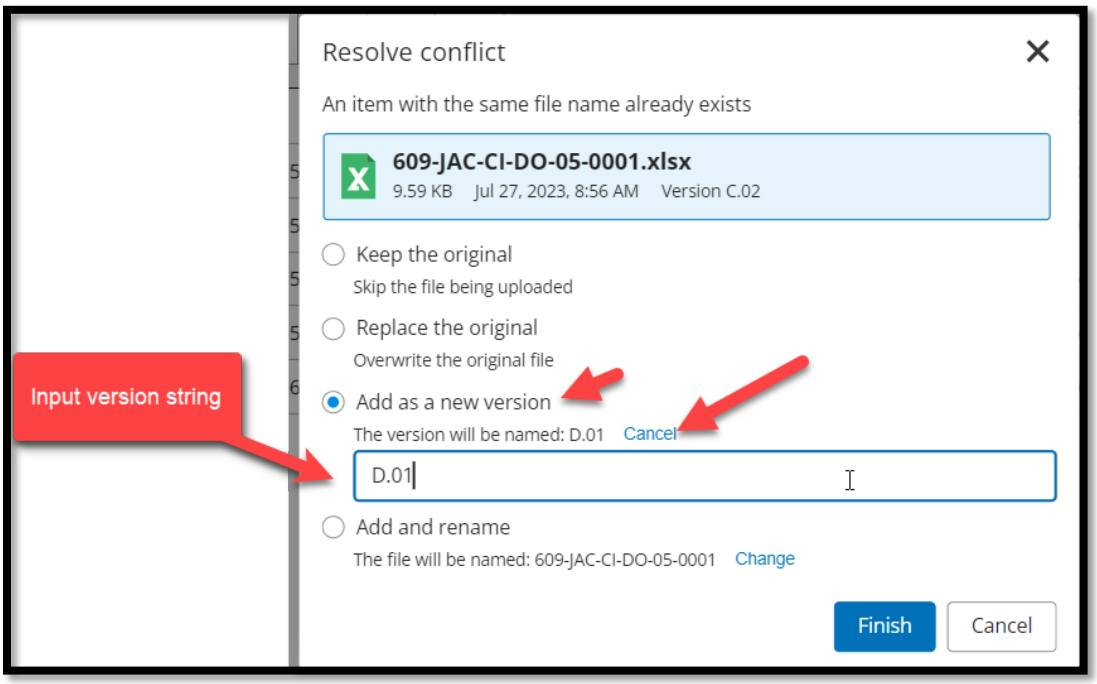
| Name | Revision | Version |
|---|---|---|
| 609-JAC-CI-DO-05-0001 | C | C.01 |
| 609-JAC-CI-DO-05-0001 | C | C.02 |
| 609-JAC-CI-DO-05-0001 | B | B |
| 609-JAC-CI-DO-05-0001 | A | A |

1. Turn on version display.
2. Select the file that will be prompted to the active version (in this case Version A File).

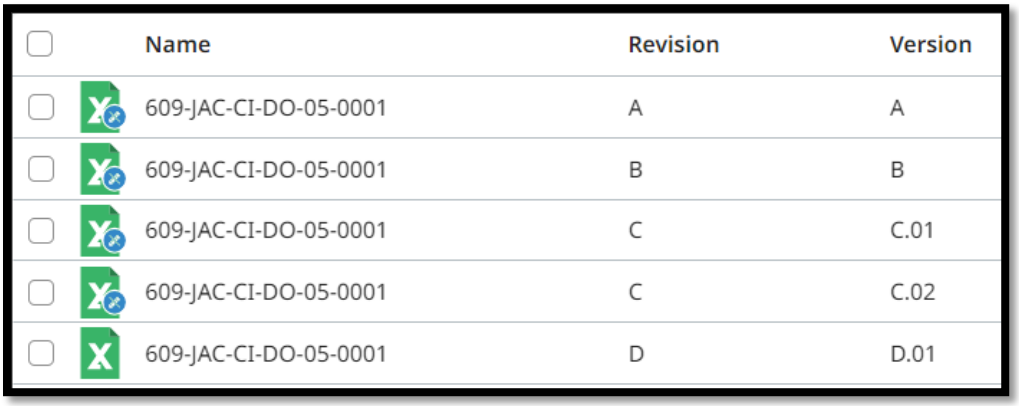



3. From the menu option select **Download**, download the file locally.
4. From the directory that the file was downloaded to, select the file and drag-n-dop the file in the same folder where it was downloaded from.
5. A dialog will open confirming that a file conflict is in action, as there is existing files with the same name, which indicates a new version will need to be created.

6. Because the file name wasn't changed, ProjectWise Web will prompt the user on what actions to take, as the user is wanting to create a new version of the document the user will select **Add as a new version,** see sample below.




7. Select the **Finish** button and the active file will be versioned, with the file that was imported.



| Name | Revision | Version |
|---|---|---|
| 609-JAC-CI-DO-05-0001 | A | A |
| 609-JAC-CI-DO-05-0001 | B | B |
| 609-JAC-CI-DO-05-0001 | C | C.01 |
| 609-JAC-CI-DO-05-0001 | C | C.02 |
| 609-JAC-CI-DO-05-0001 | D | D.01 |

## ProjectWise Web Icons

# Document and Folder Icons

Each document has an icon that indicates which application is associated with it, based c
file that is attached to the document.

Some documents will also have a smaller icon, either in the upper left or lower right corr
document icon, which indicates additional information about the document, such as wh
master document, or is a non-active version, or is checked out or locked.

| Icon | Description |
|---|---|
| | A regular folder |
| | A special type of folder called a work area |
| | A work area that is associated to a ProjectWise project |
| | This can be:<br>• A document that has no file attached (sometimes referr *placeholder* document)<br>• A document that has a file attached, but the extension i to any application |
| | A flat document set |
| | A MicroStation DGN file |
| | An AutoCAD DWG file |
| | A Revit RVT file |
| | A Microsoft Word DOC or DOCX file |

| Icon | Description |
|---|---|
| | An AutoCAD DWG file with references (master document of a |
| | A document checked out to you in ProjectWise Web<br><br>When you check out a document from ProjectWise Web from connection that is not synchronized with ProjectWise Drive (o synchronized but ProjectWise Drive is not running), the docur checked out to you in ProjectWise Web.<br><br>**Note:** You will only be able to check this document in from Pr you later synchronize this work area connection with ProjectW document that is checked out to you in ProjectWise Web will b in ProjectWise Drive. |
| | A document checked out to you in ProjectWise Drive<br><br>When you check out a document from ProjectWise Web from connection that is synchronized with ProjectWise Drive (and P is running), the document will be checked out to you in Projec<br><br>A document that is checked out to you in ProjectWise Drive (w checked out from ProjectWise Drive or ProjectWise Web) has out icon in both ProjectWise Web and ProjectWise Drive, and from either ProjectWise Web and ProjectWise Drive. |
| | An Office document that you or another user currently has ch of a co-authoring session. |
| | A locked document<br><br>Reasons a document might be locked to you:<br><br>• Another user checked out the document from ProjectW<br>• You or another user checked out or exported the docur another ProjectWise application (such as ProjectWise E<br>• You checked out the document when the work area cor |

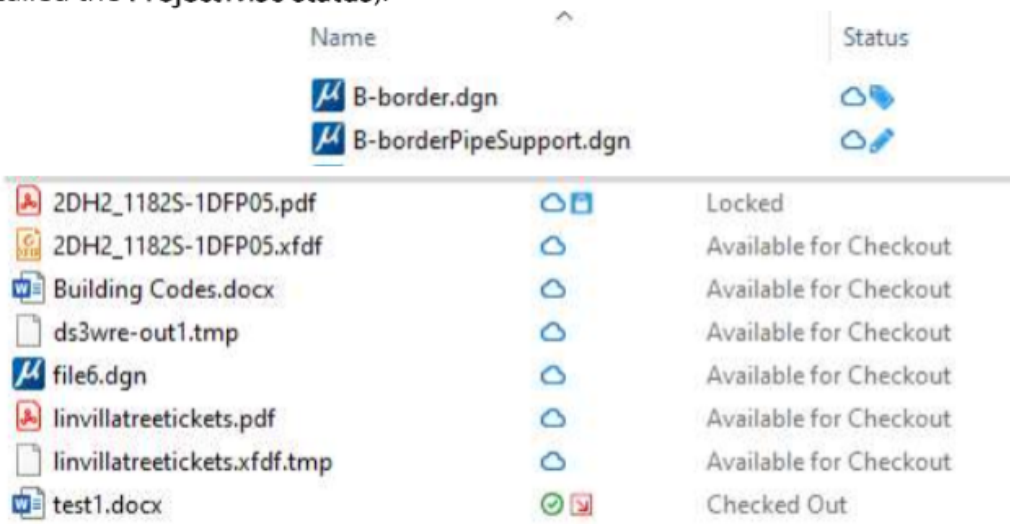
| Icon | Description |
| --- | --- |
| | • You have (Document) Read permission on the documer Read permission. These permissions are set in ProjectW you only have Read permission, this means you can see the document list, but you do not have permission to vi the document's file. |
| | A document whose status has been set to Final. In this examp MicroStation document whose status is Final. If a version is se then the final status icon will replace the version icon. Final st ProjectWise Explorer. |

## ProjectWise Drive Icons

# Document and Folder Status Icons

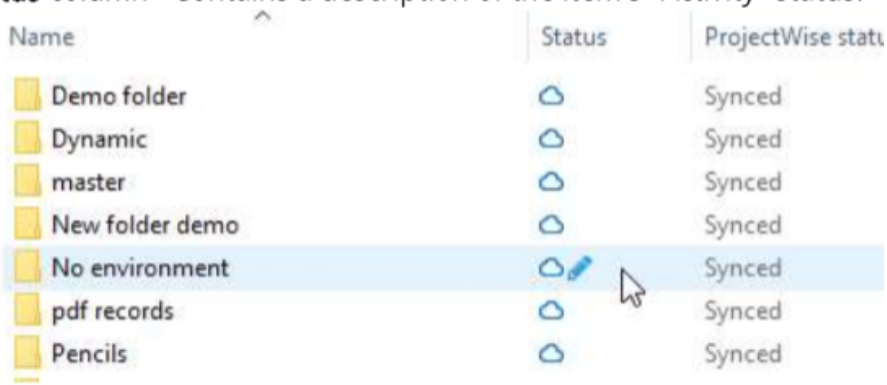
There are two columns in the document list - **Status** and **ProjectWise status** - that show t
and folders in ProjectWise Drive:

- **Status** column - For documents, this column contains two icons - one icon that ind
"Availability status" (basically the download status) and one that indicates the docu
(also called the **ProjectWise status**).




For folders, the Status column will show an "Activity" icon when auto checkout is e

- **ProjectWise status** column - Contains a description of the item's "Activity" status.




Tip: The **ProjectWise status** column is currently hidden in the document list by default. T

| Icon | Name | Description |
|---|---|---|
| | | (either it has not been downloaded yet, or the local copy deleted). |
| | **Available on this device** (clear circle with a check mark icon) | This icon means that a local copy of this document is ava computer (it was automatically downloaded from Project opened or checked out the document). |
| | **Always available on this device** (filled circle with a check mark icon) | This icon means that the local copy of the document that this computer was downloaded using the **Always keep on** option (or possibly, it was downloaded by opening or che document, and later the **Always keep on this device** optic for the document).<br><br>If **Storage sense** (a Windows feature) is on and enabled f Drive, then the **Always keep on this device** option will als in ProjectWise Drive that is marked with the icon from automatically deleted by Storage sense (when Storage se removes unused ProjectWise Drive files from the compu |
| | **New local document** (star/asterisk icon) | This icon means that this is a local document that has no ProjectWise yet. |
| | **Excluded from automatic creation** (crossed out cloud icon) | This icon means that this file type is excluded from autor creation. This type of file can still be manually added to P needed. |

# Activity status (ProjectWise status) icons for

| Icon | Name | Description |
|---|---|---|
| | **Checked in with Write access** (pencil icon) | This icon means that the document is checked in and permission to check it out. (Permissions are set in Pro |

| Icon | Name | Description |
|---|---|---|
| | **Checked in with Read-only access** (crossed out pencil icon) | This icon means that the document is checked in and permission to download or open the document for vie cannot check it out). |
| | **Locked** (lock icon) | This icon means that another user has checked out or document. Documents that are locked cannot be chec be downloaded and opened for viewing. |
| | **Final** (Final status / tag icon) | This icon means that someone has set final status on (either from ProjectWise Web or ProjectWise Explorer final status cannot be checked out but can be downlo for viewing. |

# Availability status icons for folders

| Icon | Name | Description |
|---|---|---|
| | **Available when online** (cloud icon) | This icon means that not all the documents in this folder (ar have been downloaded to your computer. |
| | **Available on this device** (circle with a check mark icon) | This icon means that all the documents in this folder (and it have been downloaded to your computer. |
| | **Always available on this device** (filled circle with a check mark icon) | This icon means that all the documents in this folder have b using the **Always keep on this device** option (or possibly, all documents were already downloaded, and later the **Always device** option was turned on for the folder).<br><br>If **Storage sense** (a Windows feature) is on and enabled for I then the **Always keep on this device** option will also prevent ProjectWise Drive that is marked with the icon from bein deleted by Storage sense (when Storage sense periodically r ProjectWise Drive files from the computer). |