

### ProjectWise Explorer Window Layout

#### Datasource Pane

Lists all the datasources found on the network. Also lists the projects and the folders within projects in a datasource.

#### Search

To find documents, folders, and projects.

#### Menu Bar

#### Datasource

Container of projects, folders, and documents

#### Project

Super-folder that provides a place to manage and organize documents.

#### Folder

A container for documents and other folders in the datasource

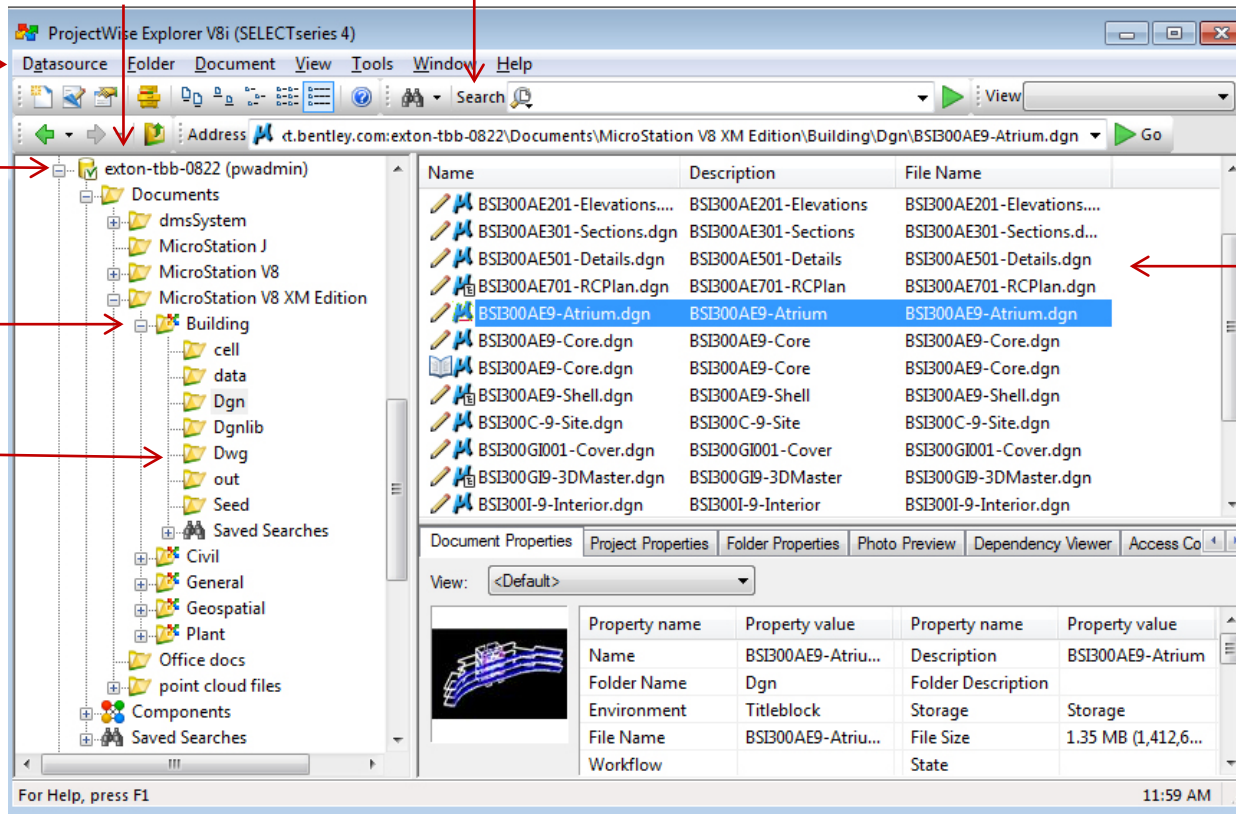
Clicking the plus (+) sign next to any folder will expand it to display the folders contained within it.

#### Document Pane









Lists the documents or subfolders stored within the folder selected in the datasource pane. Icons are displayed next to each document that shows the application it is associated with and the current access you have to the document.

#### Preview Pane






Displays the properties of the selected folder or document.







## Icons in the Datasource List

	ProjectWise Explorer Datasources — This is the topmost item in the datasource list of ProjectWise Explorer, under which all your datasources can be found.
	Closed Datasource — A datasource you are not logged in to.
	Active Datasource — A datasource you are logged into and working in.
	Open Datasource — A datasource you are logged into but not currently working in.
	The Documents root folder, or any regular document folder. The Documents root folder is the top folder of any datasource, under which all other folders and projects are created.
	Project — A project folder.
	Saved Searches — There is the general Saved Searches for the datasource, and also a Saved Searches folder under each project.
	Either the Global or Personal folder under the Saved Searches folder, or a saved search within one of those folders.

## Icons in the Document List

	Read / Write — The user can open the document and make modifications.
	Read Only — The document can be opened but not modified.
	Locked — The document has been checked out and opened by another user. You can still open this document as read-only.
	Checked Out — Document is Checked Out to you. It was opened in an application for modifications. It will appear as locked to other users.
	Exported — Document has been exported by you. It will appear locked to other users.

## Icons Which Indicate a Document's Type and Associated Application

	This is the default application icon, for when a document is associated to an application, but the application itself has no icon associated to it.
	This icon displays next to a document either which is not associated to an application, or which has no file attached.
	A flat document set.
	An AutoCAD document.

## Shortcut keys

### Windows standard known shortcut keys

**F1** = Help  
**Alt F4** = closes ProjectWise

### When you have the datasource highlighted

**F2** = dialog comes up to ask you if you want to log in or out of PW  
**CTRL+M** = If you have the datasource highlighted and are not logged in displays the Login window  
**F5** = collapses the folder hierarchy

### When logged into a Datasource in ProjectWise Explorer the following controls the Menu's

**ALT+A** = Datasource pull down (ALT also controls sub commands)  
**ALT+F** = Folder pull down (ALT also controls sub commands)  
**ALT+D** = Document pull down (ALT also controls sub commands)  
**ALT+E** = Export pull down (ALT also controls sub commands)  
**ALT+V** = View pull down (ALT also controls sub commands)  
**ALT+T** = Tools pull down (ALT also controls sub commands)  
**ALT+W** = Windows pull down (ALT also controls sub commands)  
**ALT+H** = Help pull down (ALT also controls sub commands)

### When you have a folder highlighted

**F2** = Folder properties  
**F5** = Refresh  
**Up arrow** = To move up the hierarchy  
**Down arrow** = To move down the hierarchy  
**CTRL+A** = Highlights all objects (folders or documents) in the Document View  
**CTRL+M** = Expands a folder  
**SHIFT+<"letter">** = Will jump to a folder that begins with that "letter"  
**Right arrow** = Expands hierarchy  
**Left arrow** = Collapses hierarchy  
**<Ins> or <Insert>** = Opens the Create Folder window  
**<Del> or <Delete>** = Deletes the currently selected folders  
**CTRL+SHIFT+ALT+R** = Hides everything in the tree except the selected folder and everything below it  
**CTRL+SHIFT+ALT+T** = Unhides the tree

### When you a document highlighted

**Space Bar** = Brings up properties page  
**CTRL+A** = Selects all documents in the folder (and folders if showing folders) in the right pane  
**CTRL+C** = Copies the selected documents and or folders highlighted in the right pane  
**CTRL+V** = Pastes the selected documents and or folders highlighted in the right pane  
**<Ins> or <Insert>** = Opens the Create (single) Document window  
**<Del> or <Delete>** = Deletes the currently selected documents

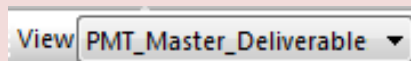
## Tool Bars

ProjectWise Explorer has four main tool bars: **Standard, View, Interface, and Address**. You can turn these tool bars on or off by going to the **View > Toolbar** menu item and click the checked menu item next to the tool bar you would like to remove.



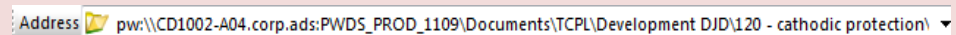
**Standard Tool bar**

The standard tool bar is where a user can create a new document, open a document, view the file properties of a document, search, open the local document organizer, change the arrangement of files in the document pane, get help, and navigate up one folder level.



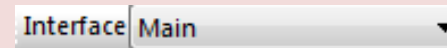
**View Tool Bar**

The view tool bar allows you to change the information displayed inside of the document pane.



**Address Tool bar**

The address tool bar shows the location path of whatever is selected in any of the panes. You can use this address as a link to send to others so they can locate the document in ProjectWise. Simply right-click on the address you want as a link and select either Copy URL or Copy URN.



**Interface Tool bar**

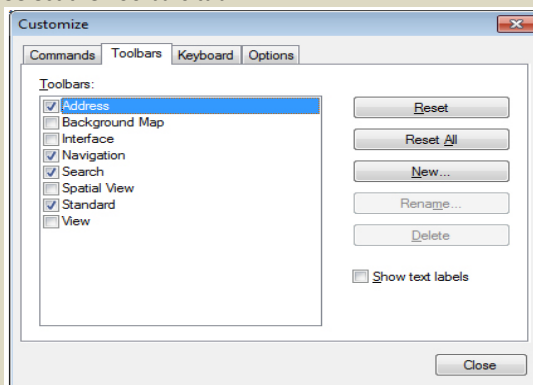
The interface tool bar allows you to select which document attribute interface will be displayed when you view the Attributes and More Attributes tab of the Document Properties dialog. An interface can be created for each of the different groups that use ProjectWise to allow that group to only see the attributes that are of most value to them.

## Customizing ProjectWise Explorer

Using the Customize dialog (**Tools > Customize**) you can customize existing or create new toolbars and assign keyboard shortcuts to particular commands.

### To Create a Toolbar

1. Select Tools > Customize.  
The Customize dialog opens.
2. Select the Toolbars tab.

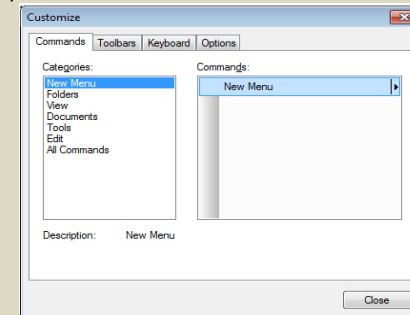


This tab lists all of the toolbars available for display in ProjectWise Explorer. You can set or clear the check box next to any item to display or hide its toolbar, respectively. This is the same as toggling the display of the toolbar by selecting it from the View menu in ProjectWise Explorer.

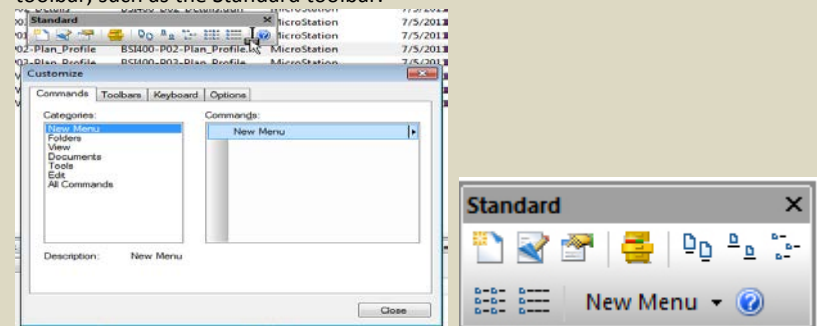
3. Click New.  
The Toolbar Name dialog opens.
4. Enter a name and click OK.  
The new toolbar is created as a floating toolbar, and the new toolbar also displays on Toolbars tab. You can now dock this toolbar with the other toolbars.

### To Add a Menu to a Toolbar

1. Select Tools > Customize.  
The Customize dialog opens.



2. On the Commands tab, select the New Menu category.  
The New Menu command displays in the Commands list.
3. Drag the New Menu command from the Commands list into a ProjectWise Explorer toolbar, such as the Standard toolbar.

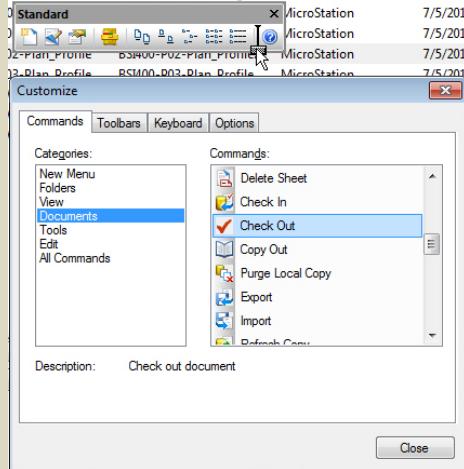


The new menu displays in the toolbar.

## Customizing ProjectWise Explorer

### To Add a Command Button to a Toolbar

1. Select Tools > Customize.  
The Customize dialog opens.
2. On the Commands tab, select All Commands, then select a command from that category.
3. Drag the command to a toolbar.



The command displays in the toolbar.



### To Create Keyboard Shortcuts

1. Select the Keyboard tab of the Customize dialog.  
This tab lets you assign any keys or any combination of keys on your keyboard to certain functions within ProjectWise. For example, you can assign a Function Key, such as <F6>, or a combination of keys, such as <CTRL-ALT+C>, to copy out a document.
2. Select the category option you require from the Category list.  
When a category is selected the list of available commands relating to that category display in the Commands window.
3. Select a command.  
A description of the selected command displays in the Description field.  
If the selected command already has a key or combination of keys assigned to it, it displays in the Current Keys window. To change the key for this command, you can remove it and assign a new one.
4. With your command selected, place your mouse cursor in the Press New Shortcut Key field and press the appropriate key(s).  
Your key or combination of keys display in the Press New Shortcut Key field, and a message appears below the field, stating if the key or key combination is already assigned to another command.
5. Click Assign to assign your key(s) to the command.