

Checking Out And Opening Documents

Checking out a document locks the document so that no other user can make changes to it while you are working on it. To check out a document, you must have read/write privileges for that document.

You can either check out the document and open it later, or you can check out the document and open it simultaneously. Opening a document to which you have read/write privileges checks the document out (if not already checked out), downloads a copy of the document from the ProjectWise server to your working directory, then opens the document in the appropriate application.

When you check out a document, the document's read/write (pencil) icon is replaced by a check mark icon to show that you have checked out the document. To other users, the read/write icon is replaced by a lock icon to show that the document has been locked by another user.

You can only check out documents for which you have read/write privileges, and which are not locked by you or another user.

To check out one or more documents (to be edited later)

1. In the documents window, select one or more checked in documents to which you have write access and from the Document menu, choose Check Out.

To check out and open a document (in its associated application)

1. In the documents window, select a checked in document to which you have write access and from the Document menu, choose Open.

The document is checked out and opened. The program that launches depends on the ProjectWise application associated to the document, and the program defined to open documents associated to that application.

When the user setting 'Show Selective Set Open dialog' is on, opening the master document of a logical set opens a dialog box which lets you specify whether you want to check out or copy out one, some, all, or none of the references in the set. When this setting is off, all references are

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automatically copied out when you open the master document of a logical set (see Working with Logical Sets and References for more information).

To open a document in a new instance of the document's associated application

1. Open a document from ProjectWise Explorer (Document > Open).
2. After the document opens in its associated application, go back to ProjectWise Explorer and select another document associated to the same application.
3. This time, press the <Shift> key and choose Document > Open. The second document opens in a new instance of the associated application.

To check out a document that is already copied out, from the Organizer dialog box

1. If the Organizer dialog box is not already open, choose Tools > Organizer.
2. From the dialog box's View menu, choose Copies. All documents that are currently copied out to you, display in the list box.
3. Select a document.
4. From the dialog box's Action menu, choose Check Out. The status of the document changes to checked out, and is removed from the list of copied out documents. You can see the document in the Organizer dialog box by choosing View > Check Outs.

You can also check out and open documents in applications other than their associated application. Opening documents in this way does not change the application's associated executable.

To check out and open a document (in an application other than the associated application)

1. In the documents window, select a document and from the Document menu, choose Open With. A standard file open dialog box opens,

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allowing you to search for the program shortcut or executable file for the application in which you want to open the file.

2. Navigate to and select the appropriate executable (.exe) file or program shortcut, then click Open. The selected document is checked out and is opened in the selected application.