

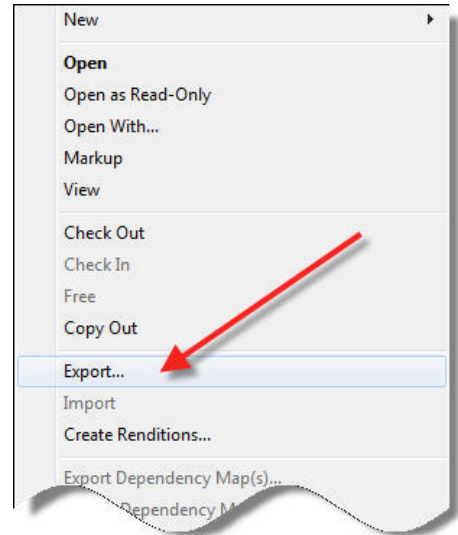
# Exporting and Importing Documents from ProjectWise

Design Manual  
Chapter 21  
Automation Tool  
Instructions  
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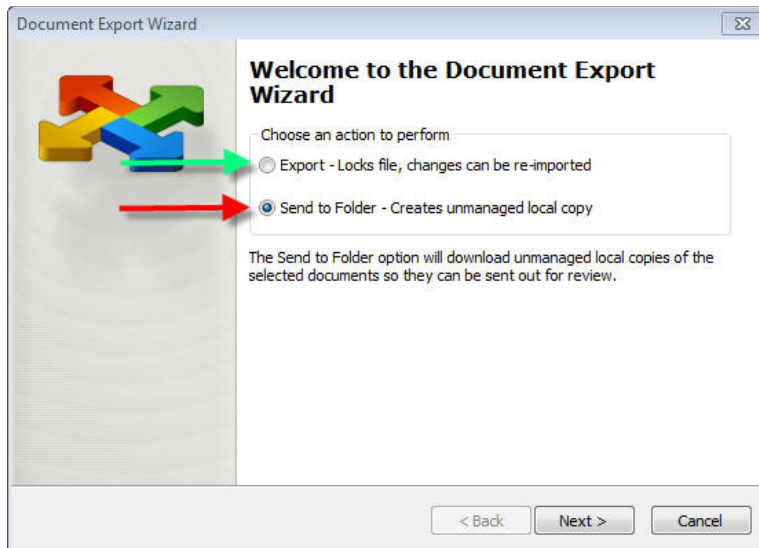
To work with a document outside of ProjectWise, the file must be exported to a specified location.

## Exporting Files from ProjectWise

To begin the export process *Right-Click* on the document you wish to export and **Select Export** as shown on the right.



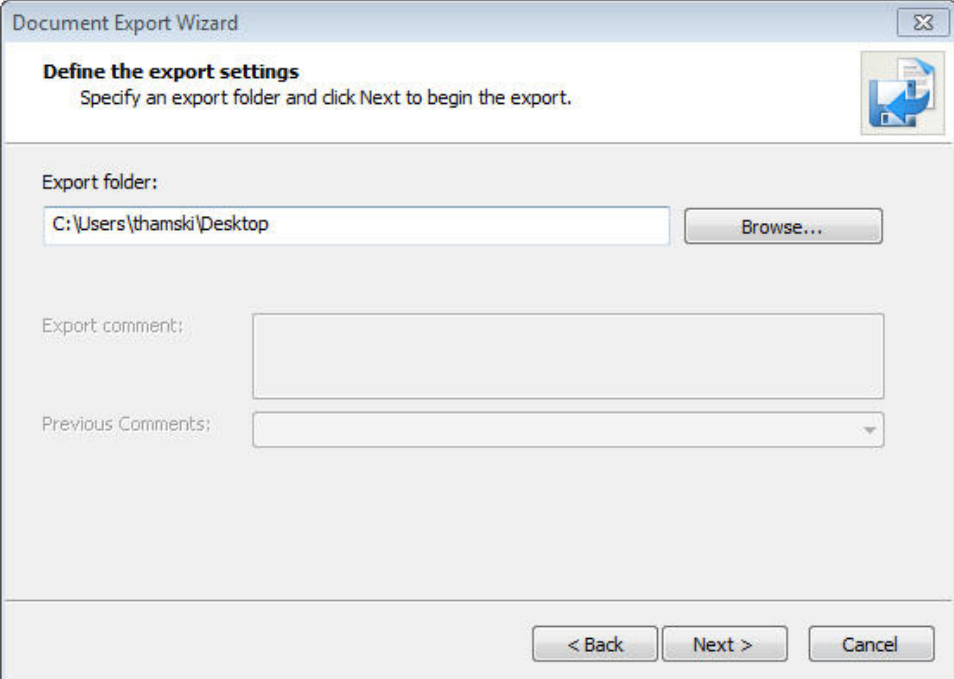
After clicking on **Export**, the dialog below will pop up. Two options are available for exporting a file: managed (Green Arrow) and unmanaged (Red Arrow).



Exporting a file as a managed copy will check the document out and lock other users from making changes to the document. Exporting a file as an unmanaged copy will simply copy the file out of ProjectWise to the location specified.

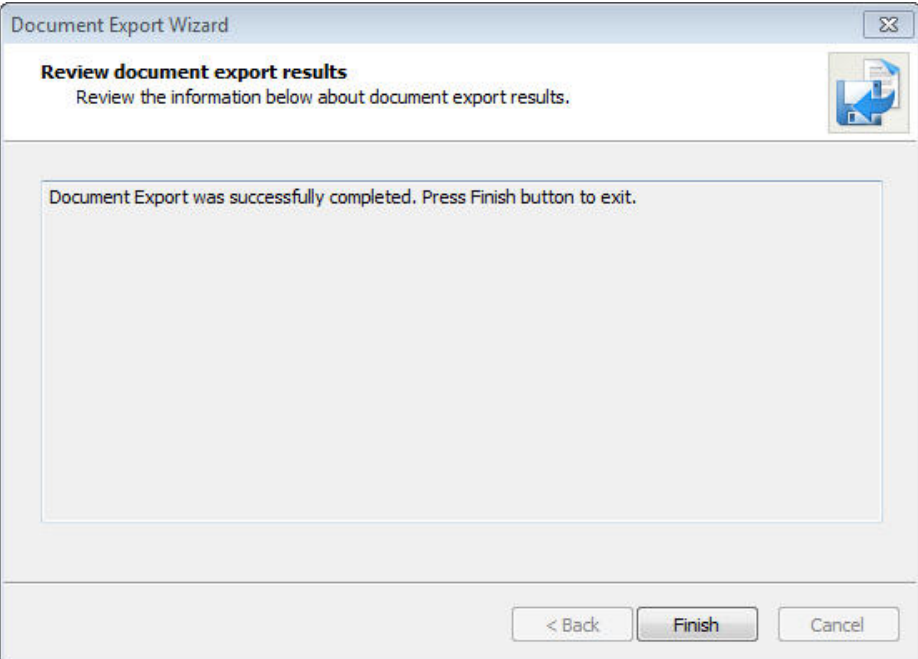
After selecting the Export option, the next screen (shown below) will prompt you for a file location to save the document. This screen is the same whether you select managed or unmanaged.

Select a location to which to save the document by either typing in the location or *Clicking* on the **Browse** button to select the folder location in which to save the document. After the location has been selected, *Click* on the **Next** button to export the file.



The screenshot shows the 'Document Export Wizard' dialog box. The title bar reads 'Document Export Wizard'. The main heading is 'Define the export settings' with the instruction 'Specify an export folder and click Next to begin the export.' Below this, there is a text box for 'Export folder:' containing 'C:\Users\thamski\Desktop' and a 'Browse...' button. There is also a text box for 'Export comment:' and a dropdown menu for 'Previous Comments:'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

When the process has completed copying the file to the specified location, the dialog will indicate the file was successfully exported, as shown to the right.

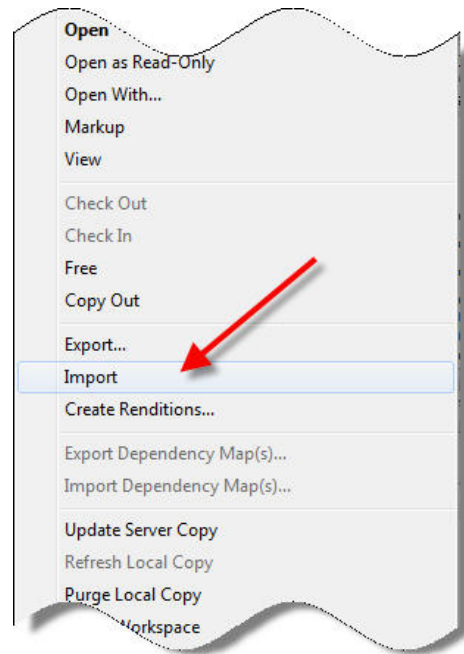


The screenshot shows the 'Document Export Wizard' dialog box. The title bar reads 'Document Export Wizard'. The main heading is 'Review document export results' with the instruction 'Review the information below about document export results.' Below this, there is a large text box containing the message 'Document Export was successfully completed. Press Finish button to exit.' At the bottom, there are three buttons: '< Back', 'Finish', and 'Cancel'.

## Importing Files that have been Exported as a Managed Copy

If a document was exported as a managed copy, it will need to be imported back into ProjectWise system before other users will be able to view any changes made outside of ProjectWise. ProjectWise remembers the location to which you exported the file as a managed copy. The file must be in the same location to which it was exported for the import process to be successful. If the file was moved from its export location, ProjectWise will ask if you care to locate the file in another location.

To import a document, *Right-Click* on the file inside ProjectWise Explorer and *Click* on **Import**. A dialog prompting to enter comments if desired will appear. *Click* **OK** to finish the import process and check the document back into ProjectWise.



## **Chronology of Changes to Design Manual Section:**

### **021F-021 Exporting and Importing Documents from ProjectWise**

12/3/2015 NEW  
New