



PMWeb Document Manager 2

Version 7.1 and Higher

While every effort has been made to ensure the accuracy of the information in this document, PMWeb provides this information without any guarantee whatsoever, including, but not limited to, the implied warranties of merchantability or fitness for a particular purpose.

Copyright © PMWeb 2021. All rights reserved. This document, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without express written permission of PMWeb, Inc. Names and logos mentioned herein may be trademarks of their respective owners.

Introduction

Document Manager has long been a PMWeb workhorse. Through thousands of projects, large and small, PMWeb clients have used Document Manager to store, index, and retrieve millions of electronic files. Here are just a few of the features that have made PMWeb Document Manager so popular and effective:

- A folder structure defined by you – Folder structures can be copied project to project or completely reinvented.
- Drag and drop – Drag files into PMWeb from your device to add them or drag folders and files to new locations.
- System metadata – Every file automatically becomes a full-fledged PMWeb record with all the standard features.
- Custom attributes – Define an unlimited number of data fields to store additional file metadata.
- Check in / check out – Check out a file for editing and in when it is done. No one can overwrite it in the meantime.
- File versioning – A file’s version number automatically increments when new versions are added to the folder.
- Subscriptions – Subscribe to folders, for yourself and on behalf of others, to be alerted when their contents change.
- Flexible permission levels – Assign view, edit, and manage folder permissions to user groups or even individual users.
- Search – Search one or all folders for the file you want, including custom attribute fields and some files’ contents.
- PMWeb Viewer – Directly link to PMWeb’s image viewer, where users can mark up, redline, and measure.
- Link to the entire PMWeb platform – Files stored in Document Manager can be used throughout PMWeb.

Document Manager 2

PMWeb Version 7.1 introduces Document Manager 2, a complete reinvention of the original. The familiar features of the old version remain but a boatload of new ones have been added, and they are all wrapped in a stylish new interface.

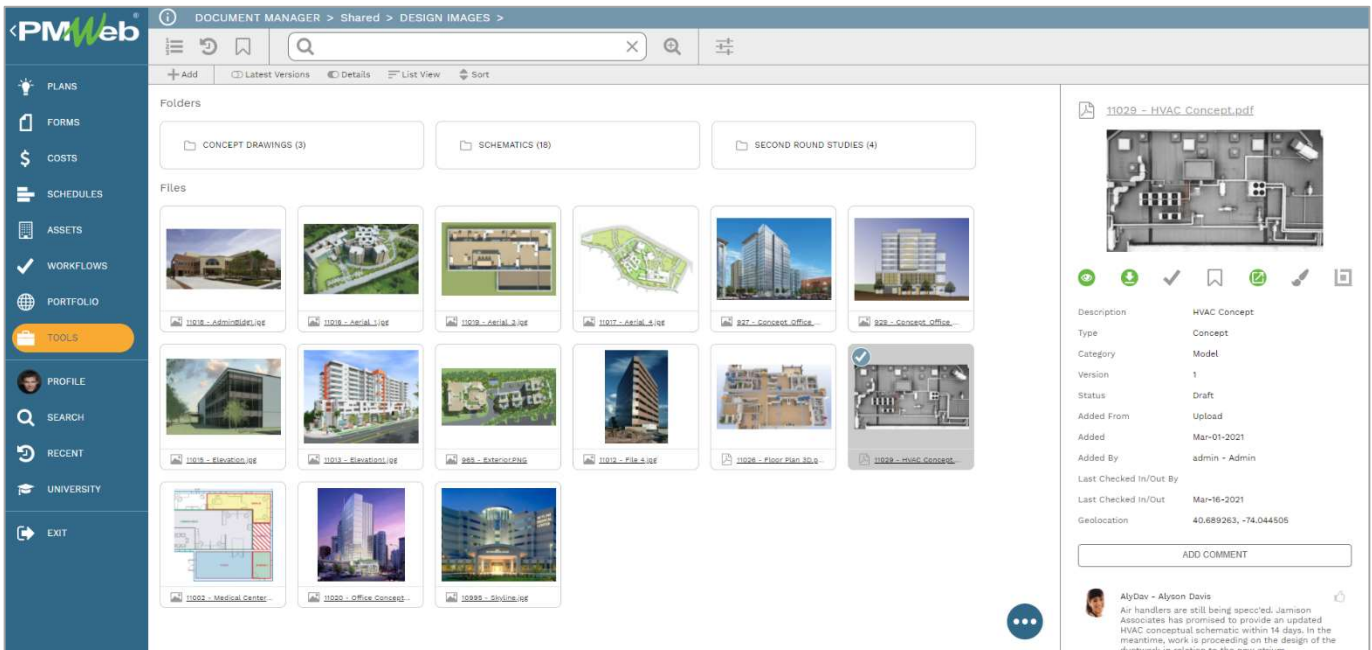


Figure 1 – PMWeb Document Manager 2

Document Explorer

The original Document Manager was based on a folder tree. In that model, folders are displayed in a resizable pane on the left side of the screen and users click a folder to reveal its contents in a table on the right. Folder tree nodes can be expanded or collapsed, and the range of folders displayed in the tree can be managed, but only by using a separate overlay pane. When a file in the table is clicked on, its details show in a third pane beneath the table. While this model works, there are some drawbacks: managing the folders that show in the tree requires extra effort, three panes in the window mean each is limited for space, and it's not as easy as it could be to understand what actions are available.

Document Manager 2 addresses all of these concerns and many more. It is built on an all new document explorer platform. The explorer window can be shown in [Card View](#) or [List View](#) and features a [Details Pane](#) that displays file metadata and easy to see action buttons. The explorer window always shows only the contents of the current folder and you can double click any folder to open it. Because of this, it is much easier to see what each folder contains and what features are available in each folder. You can also navigate up and down the folder structure using the [Fully Interactive Breadcrumbs](#), described in the next section.

Card View

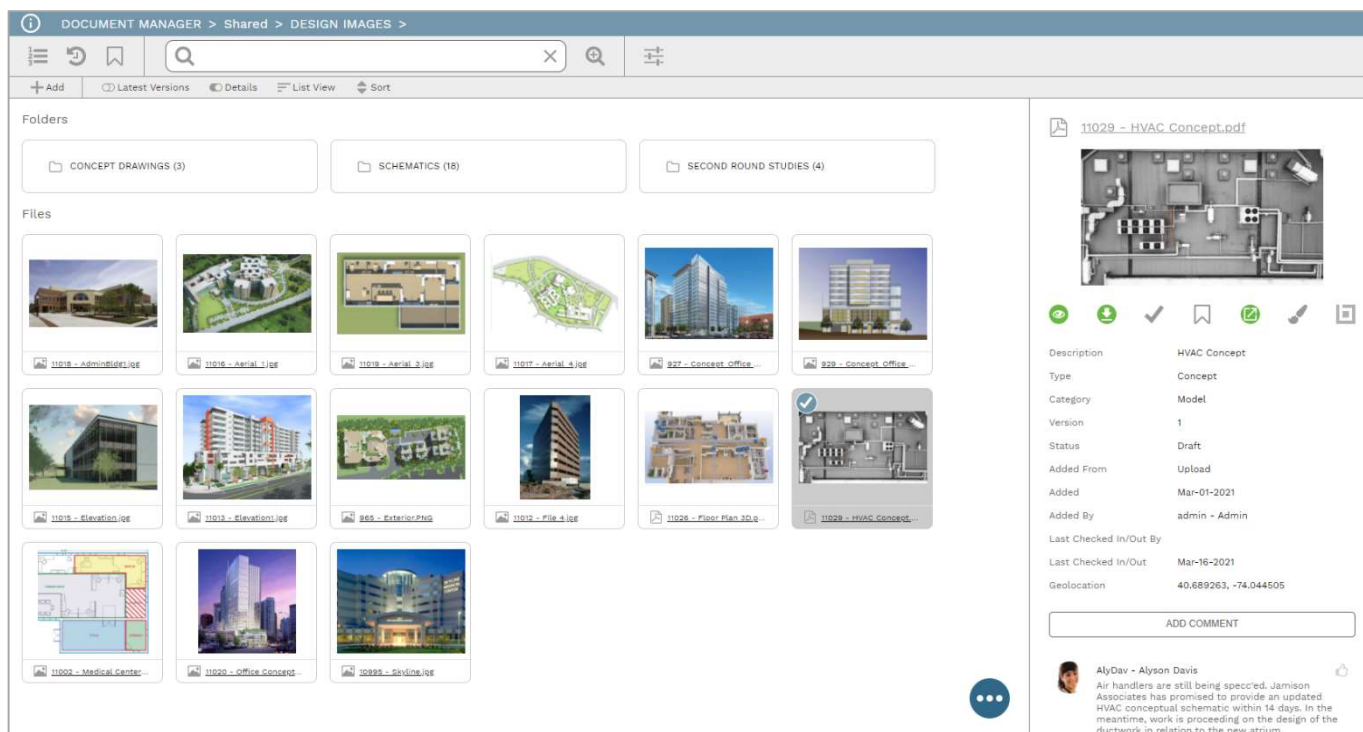


Figure 2 - The Document Explorer Window in Card View

In Card View, each subfolder and file in the current folder is shown as a card that can be clicked on to select it, clicked and dragged to be moved to a subfolder, and right clicked to reveal a context menu of available actions. If a file can be previewed, a thumbnail appears on its card. The file name at the bottom of the card is a hyperlink to its [Linked PMWeb Record](#).

Fully Interactive Breadcrumbs

Each segment of the reengineered breadcrumbs is interactive.

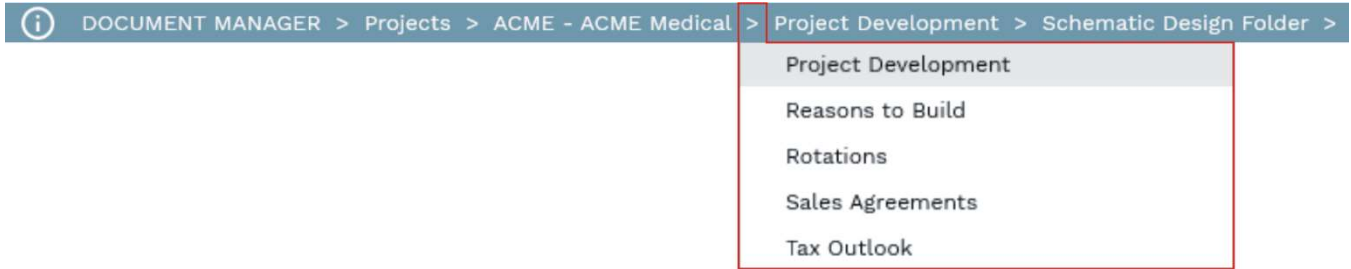


Figure 3 - Click the Folder Button to see Subfolders. Click a Subfolder to Open It.

- Online Help button – The first segment of the breadcrumbs opens the Online Help. See Version 7.1 Online Help for more details about Document Manager 2.
- “Document Manager” segment – Click this segment to open the Document Manager root folder. This special folder contains these subfolders: Locations, Projects, and Shared. If [Folder Groups](#) are enabled, this folder also contains a special settings button.
- Folder segments – Click any folder name in the breadcrumbs to open it.
- Subfolder buttons – Click any arrow button after a folder name and select a subfolder from the list to open it.

Navigate/Search Toolbar

This toolbar appears at the top of each explorer window.



Figure 4 - The Navigate/Search Toolbar

Controls in this toolbar include:

- Manager Page button – This button opens the standard PMWeb Manager Page.
- Recent records button – Opens an overlay of the last 10 [Linked PMWeb Records](#) you accessed. Each is a hyperlink.
- Bookmarks button – Opens a page showing folders and files you bookmarked.
- Quick Search bar – Type a keyword in the text box and press ENTER to search Document # and File and Folder Name fields.
- Advanced Search button – Click to open a dialog from which you can launch advanced searches.
- Settings button – Opens the Edit Folder Dialog. In the Document Manager root folder, this button opens the [Folder Groups](#) Dialog instead.

Folder Groups

Document Manager has always allowed you to manager folder permissions by user groups and individual users as well. Document Manager 2 introduces the additional option of management by Folder Groups. Each Folder Group can contain several user groups, making it much easier to manage permissions on a large scale. To enable Folder Groups in your database, turn on the “Enable Permissions by Folder Groups” setting in Portfolio/Settings.

Explorer Toolbar

This toolbar appears in most Document Manager folders.

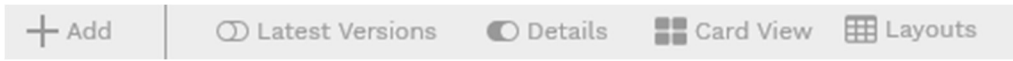


Figure 5 - The Explorer Toolbar

- Add button – Opens a context menu. The options in the menu vary, depending on the system’s configuration and the user’s permissions.
- Latest Versions switch – Turn on to show only the latest version of each file.
- Details switch – Turn on to display the [Details Pane](#).
- Card View / List View toggle button – Click to switch between the two views.
- Layouts button – Only visible in [List View](#). Allows users to create custom layouts for the List View table.

Floating Action Button

This button opens a context menu of actions.



Figure 6 - The Floating Action Button

The options in the menu vary, depending on the combination of folders and/or files selected when the button is clicked.

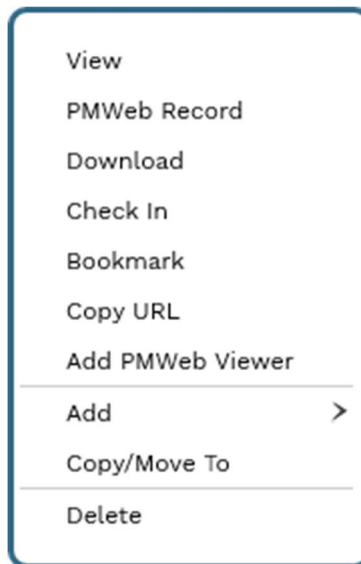


Figure 7 - A Sample Context Menu

Details Pane

500 - Document 1.png

Description	First Floor 3D Rendering
Type	Plan
Category	Drawing
Version	1
Status	Approved
Added From	Upload
Added	Jan-01-2020
Added By	JS - Jane Smith
Last Checked In/Out By	JS - Jane Smith
Last Checked In/Out	Jan-01-2022
Geolocation	40.689263, -74.044505
Attribute 1	Attribute
Attribute 2	Attribute

CB - Cary B.

After further review, the architectural review panel has decided that a new direction is in order. Given the stance of the review board vis a vis the entry arcade and the column structures, they will, so to speak, go back to the drawing board. Update will follow soon.

Yesterday

This pane shows metadata and action buttons related to the selected folder or file. The data and buttons displayed vary, depending on the selected folder or file. Some of the controls that might show include (from the top of the pane to the bottom):

File Name – This is a hyperlink to the [Linked PMWeb Record](#).

Image Preview – If the file type can be previewed, a thumbnail shows here.

Action Buttons – Buttons for folders can include Open, Edit, Bookmark, Copy URL, and Subscribe. Buttons for files can include View, Download, Check Out, Bookmark, Copy URL, PMWeb Viewer, and Bluebeam.

System Attributes – Basic metadata about the folder or file. Folder metadata can include Instructions to users. File data can include Geolocation coordinates. To automatically display Geolocation data for qualifying file types, enable the “Store Geolocation Data when Possible” setting in Portfolio/Settings.

Custom Attributes – User-defined metadata fields. These fields can be edited in the [Linked PMWeb Record](#).

Add Comment Button – Click to add a comment to the folder or file.

Comment Log – Saved comments appear below the Comment button, most recent comment at the top. Click on a comment to open it in a dialog.

List View

List View presents the same folders and files as [Card View](#), but in tabular form.

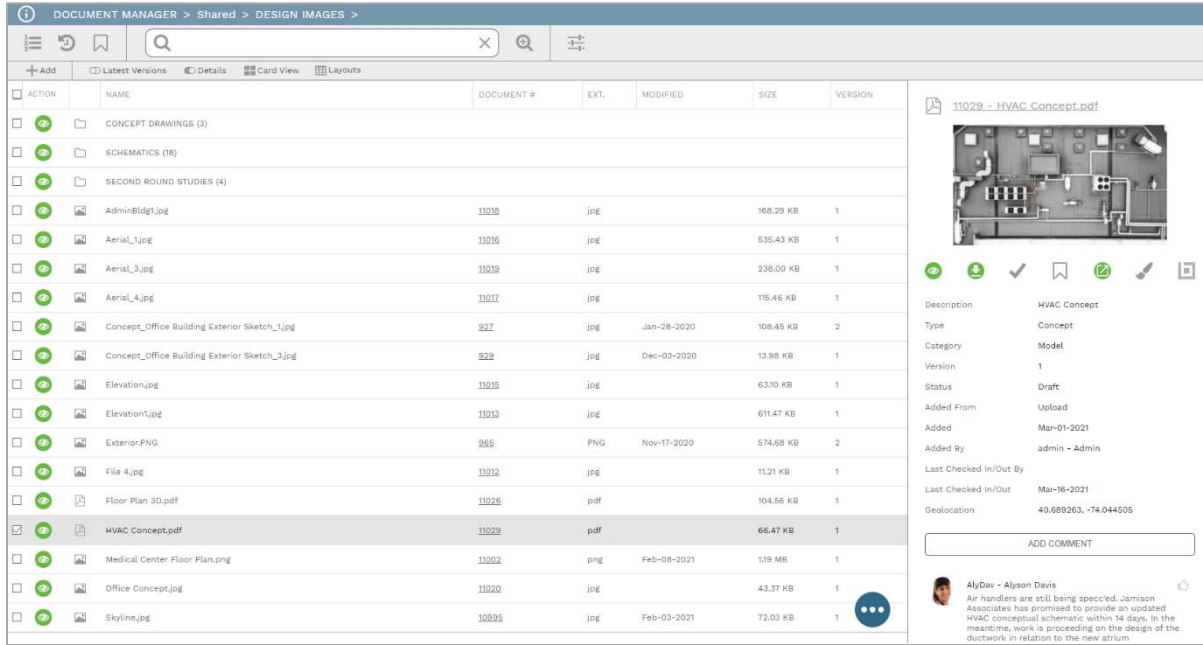


Figure 8 – Document Manager in List View

Attachment Tabs

Version 7.1 also introduces completely redesigned Attachments tabs for all PMWeb records, reflecting Document Manager 2 enhancements.

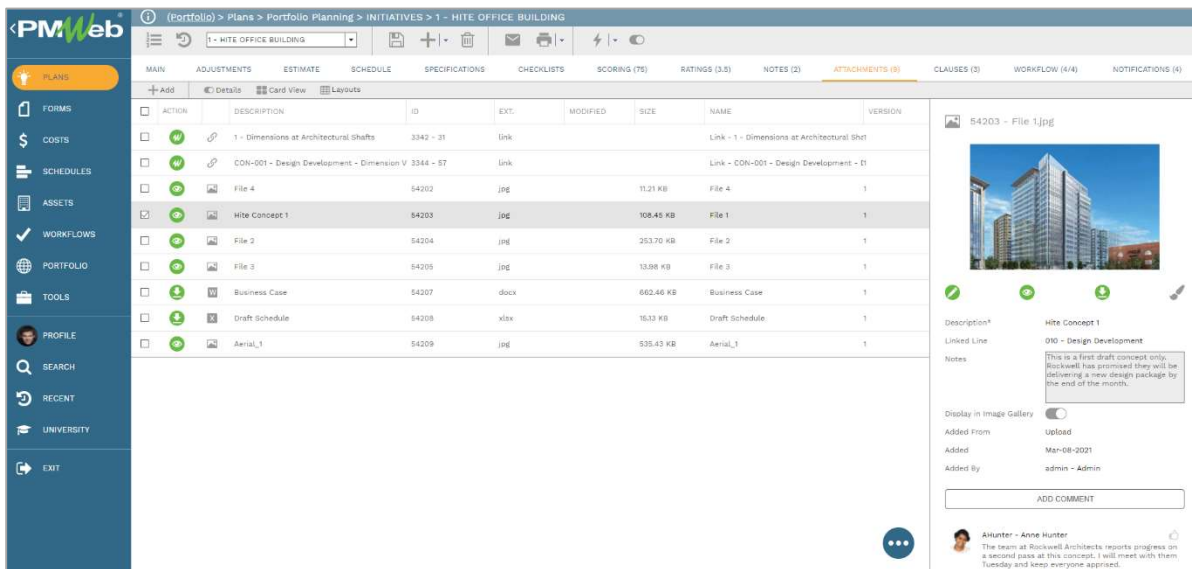


Figure 9 - Attachments Tabs Throughout PMWeb Reflect Document Manager 2

Linked PMWeb Record

Every file added to Document Manager is automatically linked to a full-featured PMWeb record.

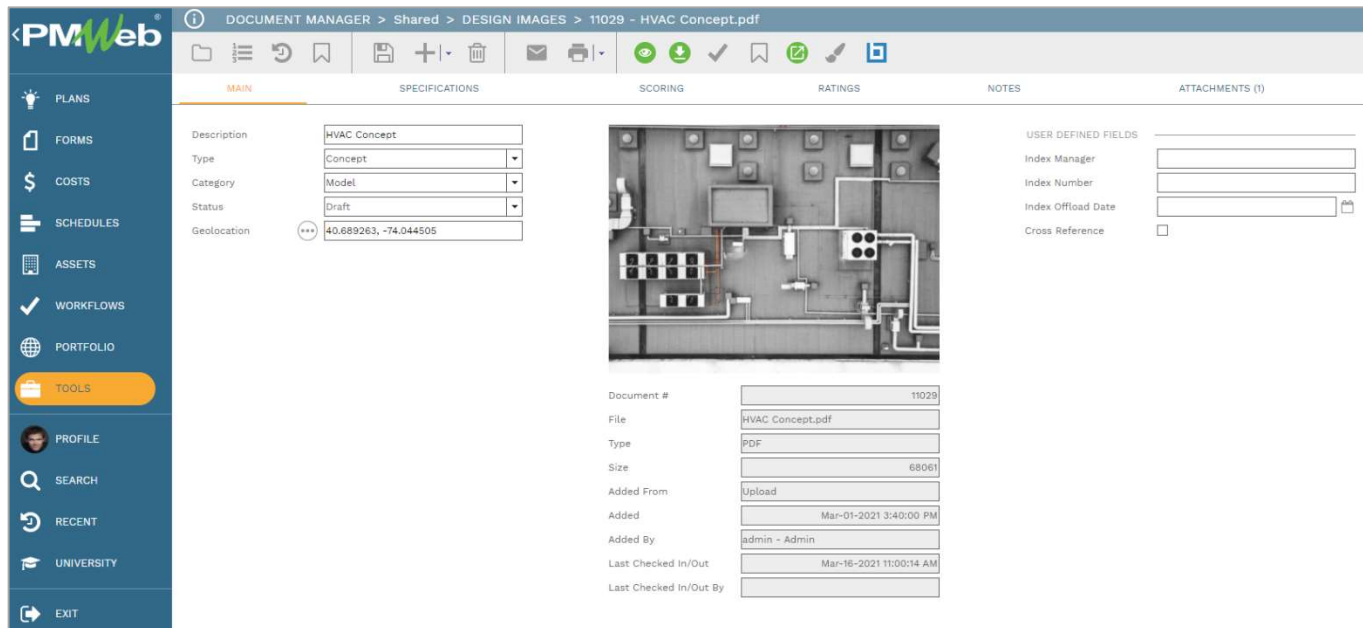


Figure 10 - A Document Manager Linked PMWeb Record

The linked PMWeb record has all of the standard features associated with other PMWeb types: it has tabs for storing additional data such as checklists and notes, it can be emailed and reported on, and it can even be routed for approval and collaboration using PMWeb’s Visual Workflow. In the original version of Document Manager, this linked record was only visible as a pane beneath the files table. In Document Manager 2, the linked file now appears as a full-fledged PMWeb record, on a page of its own. Also, the redesigned record includes new file action buttons – the same ones that appear in the [Details Pane](#), in its header toolbar.

Conclusion

PMWeb’s reinvented Document Manager makes electronic file management fast, easy, and powerful and, combined with the rest of the award-winning PMWeb platform, gives you the tools you need to manage even the most demanding projects. Upgrade to PMWeb 7.1 today or contact your PMWeb representative to learn more about Document Manager.