



PMWeb Document Manager 3

Version 7.3 and Higher

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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.
- Navigational options – Navigate using breadcrumbs and/or a configurable folder tree.
- 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 groups or individual users.
- Search – Quick search and advanced granular search, including search of 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 3

PMWeb Version 7.3 introduces Document Manager 3, a complete reinvention of the original. The familiar features of the previous version remain but we have added a boatload of new ones, all wrapped in a stylish new interface.

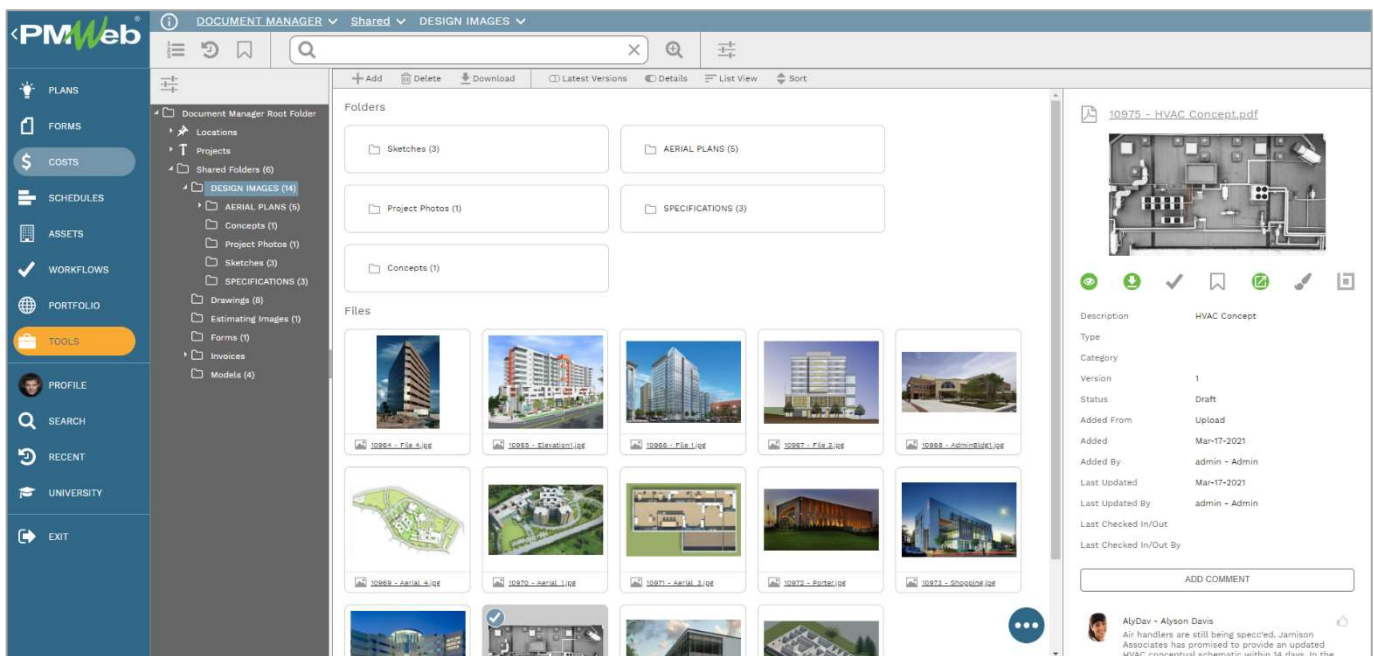


Figure 1 – PMWeb Document Manager 3

Enhanced Navigation with Document Explorer

Document Manager 3 lets you navigate two ways: using the original folder tree as well as the all-new document explorer features.

The original folder tree is a resizable pane on the left side of the screen. You click a folder to reveal its contents in a table on the right. Folder tree nodes can be expanded or collapsed, items can be dragged and dropped between folders, and the range of folders displayed in the tree can be configured by each user.

The document explorer window can be shown in [Card View](#) or [List View](#) and features a [Details Pane](#) that displays folder and file metadata and easy-to-see action buttons. The explorer window always shows the contents of the current folder, and you can double click any folder or file to open it. The enhanced search, Recent Records, and new Bookmark tools also make navigation faster and easier. Finally, you can also navigate up and down the folder structure using the [Fully Interactive Breadcrumbs](#), described below.

Best of all, you can navigate with either the folder tree or any of the document explorer features at any time.

Card View

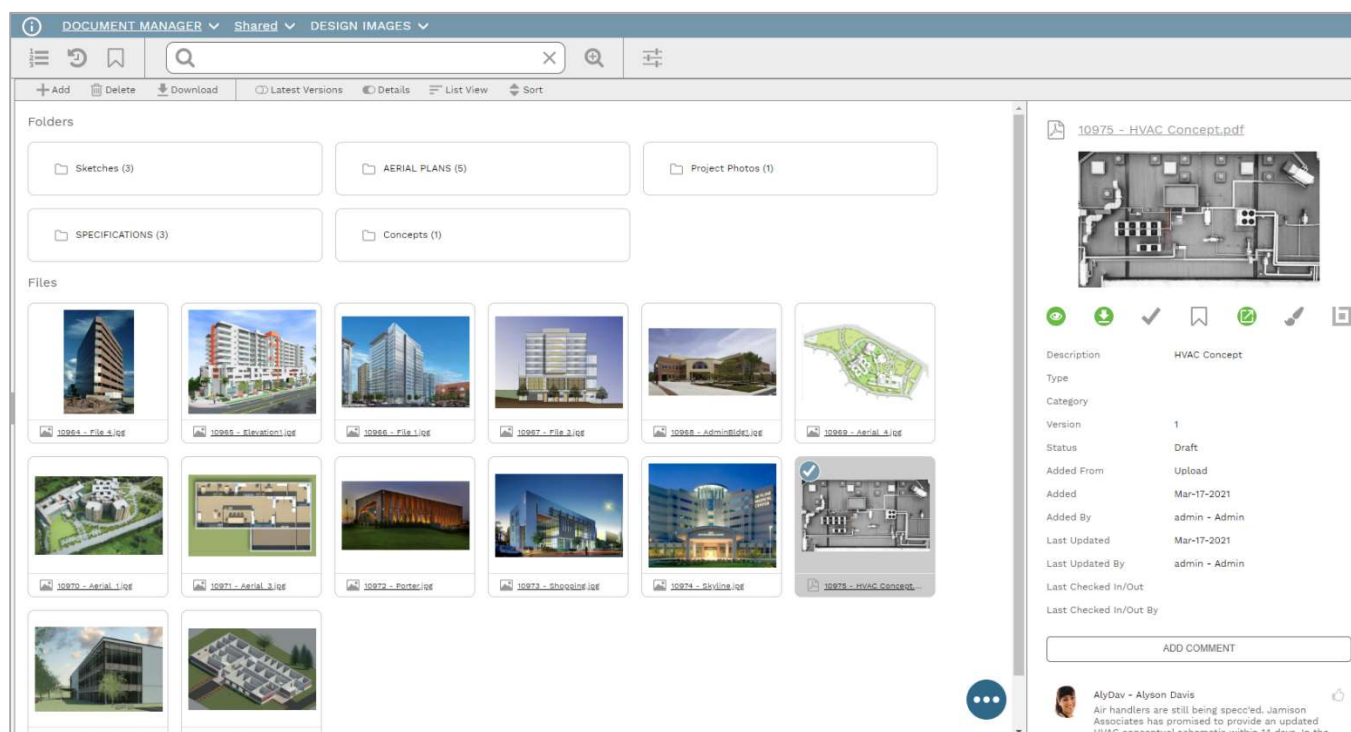


Figure 2 - The Document Explorer Window in Card View

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 different folder, 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 7.3 Online Help for more details about Document Manager 3.
- “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.
- Auto filter – Type here to automatically filter the subfolder list

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 for Document Manager records.
- Recent records button – Opens an overlay of the last ten [Linked PMWeb Records](#) you accessed. Each is a hyperlink.
- Bookmarks button – Opens a page showing folders and files you bookmarked. Click a bookmark to navigate to it.
- 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. Document Manager 3 includes the option of management by Folder Groups as well. 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.
- Delete button – Deletes the selected folders and files. Note: this button only appears if one or more folders or files are selected.
- 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.

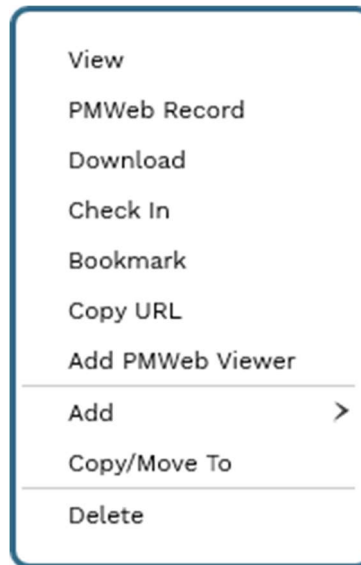


Figure 7 - A Sample Context Menu

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

ADD COMMENT



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.

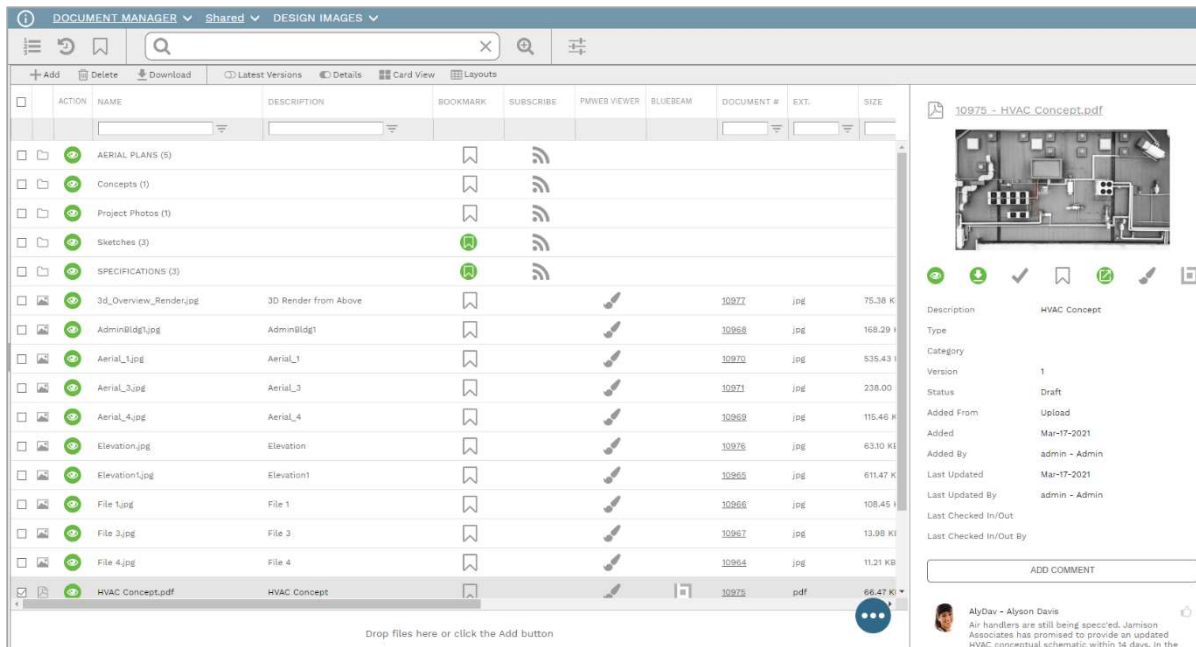


Figure 8 – Document Manager in List View

Attachment Tabs

Version 7.3 also includes completely redesigned Attachments tabs for all PMWeb records, reflecting Document Manager 3 enhancements.

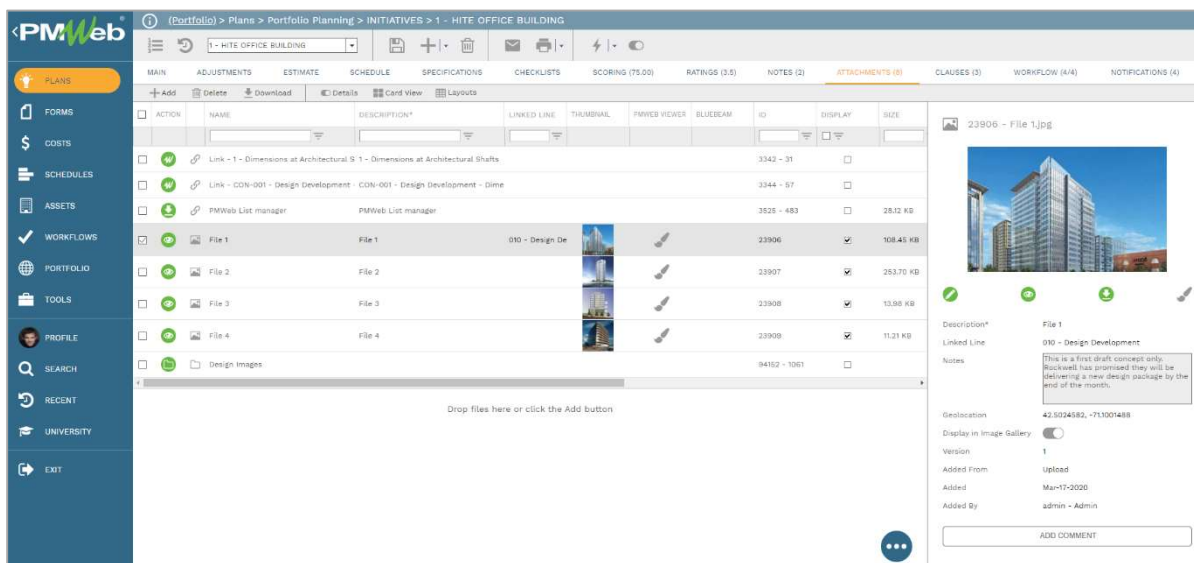
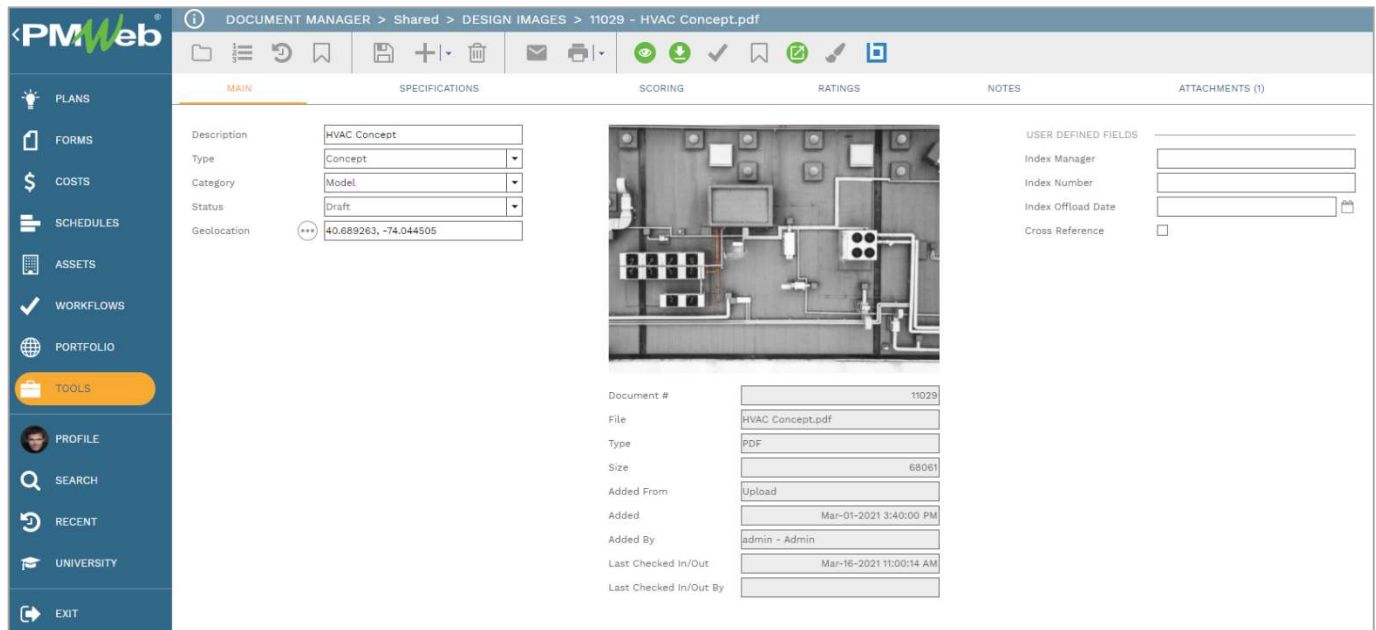


Figure 9 - Attachments Tabs Throughout PMWeb Reflect Document Manager 3

Linked PMWeb Record

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



The screenshot displays the PMWeb Document Manager interface. The top navigation bar shows the path: DOCUMENT MANAGER > Shared > DESIGN IMAGES > 11029 - HVAC Concept.pdf. Below this is a toolbar with various icons for file management. The main content area is divided into several sections:

- MAIN:** Contains fields for Description (HVAC Concept), Type (Concept), Category (Model), Status (Draft), and Geolocation (40.689263, -74.044505).
- SPECIFICATIONS:** A tab for viewing specifications.
- SCORING:** A tab for viewing scoring information.
- RATINGS:** A tab for viewing ratings.
- NOTES:** A tab for viewing notes.
- ATTACHMENTS (1):** A tab for viewing attachments.

On the right side, there are sections for USER DEFINED FIELDS (Index Manager, Index Number, Index Offload Date, Cross Reference) and a table of document details:

Document #	11029
File	HVAC Concept.pdf
Type	PDF
Size	68061
Added From	Upload
Added	Mar-01-2021 3:40:00 PM
Added By	admin - Admin
Last Checked In/Out	Mar-16-2021 11:00:14 AM
Last Checked In/Out By	

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 3, 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 7.3 today or contact your PMWeb representative to learn more about Document Manager.