

EDMS Terms Quick Reference Guide

The following topic is divided into three sections: ProjectWise, SharePoint, and FileNet.

ProjectWise

Project Center	ProjectWise	Definition
General		
Add ProjectWise Project	New Project	Project Creation Wizard
Folders		
Copy	Copy + Paste	Copies folder and contents
Move	Cut + Paste	Moves folder and contents
Delete	Delete	Deletes folder and contents
Rename	Rename	Renames folder
Add File	New File	Document Creation Wizards
Add Folder	New Folder	Creates new folder
Documents		
Open with <Connection Name>	Open	Opens document with ProjectWise assigned app.
Open with Pick an app	Open With	Select an app to open the document with
Check Out	Check Out	Check out document to working directory
Check Out and Open	Open	Check out the document and open it with the ProjectWise assigned app.
Check In	Check In	Upload to the server changes you made to a checked out doc.
Undo Check Out	Free	Check in a document without uploading changes to the server
Get Latest Revision	Copy Out	Downloads a copy of a document to working directory without checking out
Copy	Copy + Paste	Copies document to specified destination
Move	Cut + Paste	Move document to specified destination
Delete	Delete	Deletes document

Rename	Rename	Renames document
Edit Properties	Properties	Opens ProjectWise properties dialog
Version Number	Sequence	Sequential ProjectWise assigned property in a version set
Comment	Version	A version's label property, can be assigned by ProjectWise or user-assigned
Sync to this Version	Copy Out	Copies the selected version to the working directory

SharePoint

Project Center	SharePoint	Definition
Folders		
Delete	Delete	Deletes folder and contents
Rename	Edit Properties	Change folder name
Add File	dd document	Upload document to folder
Add Folder	New Folder	Create new folder
Add Document Set	Document Set	To create a document set
Documents		
Open with <Assigned App>	N/A	Opens with native app (copies doc to a temp directory)
Open with <Connection Name>	RT click + Open	Opens the document Read-Only
Check Out	Check Out	Check out document from the library
Check Out and Open	Edit Document	Check out and open with native app.
Check In	Check In	Check in document that you have checked out
Undo Check Out	Discard Check Out	Check in and discard changes
Get Latest Revision	Download a Copy	Download a copy to your computer
Copy	Send To	Copy document to a specified destination
Move	N/A	Moves document to a specified destination

Delete	Delete	Deletes document
Rename	Edit Properties	Change document name
Sync to this Version	N/A	Downloads a specific document version to a specified destination
Version	Version Number	A document's assigned version number
Comments	Comments	A user-defined comment property

FileNet

Project Center	FileNet	Definition
Folders		
Move	Move	Move folder and contents
Delete	Delete	Delete folder and contents
Rename	Properties	Change folder name
Add File	Add Document	Upload document to folder
Add Folder	Add Folder	Create new folder
Documents		
Open with <Assigned App>	N/A	Opens with native app (copies doc to a temp directory)
Check Out	Check Out	Check Out document from FileNet
Check Out and Open	Check Out and Download	Check out, download, and open with native app.
Check In	Check In	Check in document that you have checked out
Undo Check Out	Cancel Check Out	Check in and discard changes
Get Latest Revision	Download	Download a copy to your computer
Open with	Launch	Open with a selected application
Move	Move	Moves document to a specified destination
Delete	Delete	Deletes document
Rename	Properties	Change document name
Sync to this Version	N/A	Downloads a document version to a specified destination
Version	Version Number	A document's assigned version number