

# WORKING WITH PROJECTWISE FLAT SETS


## ABOUT THIS TRAINING

This training is intended to give a user the ability to use ProjectWise Flat Sets. The student should first have a basic knowledge of ProjectWise through the **ProjectWise V8i Training 101** course.

## Working with ProjectWise Flat Sets

A **flat set** is a group of documents that are placed into a container for some purpose, such as for printing, or to simplify the check-out of multiple documents across folders. When you right-click a flat set, you will see all of the options available to you for working with the flat set. When you have a flat set open, you can select and right-click the documents in the set and perform actions on them just as you would from any folder in ProjectWise Explorer .

You can place a single document into as many sets as you want. The document is not physically copied into the set, but a record of the document is added to the set. Because of this, removing a document from a set does not remove the document from the folder in ProjectWise in which it exists. However, deleting a document that is in a set will permanently delete that document from ProjectWise.

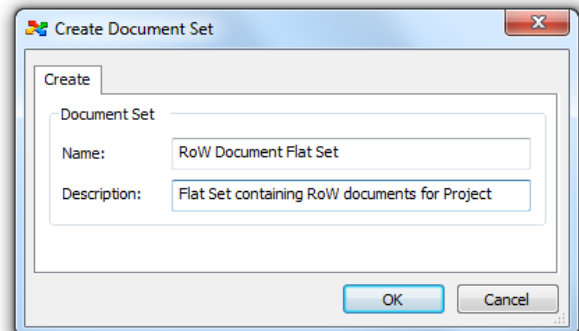
Flat Sets can be moved from one folder to another or copied. A Flat Set is recognized by this icon in ProjectWise:  Test Set

## To Create a Flat Set of Documents

You can either create a blank Flat Set and populate it with files or you can select a group of files and create the Flat Set that will contain them.

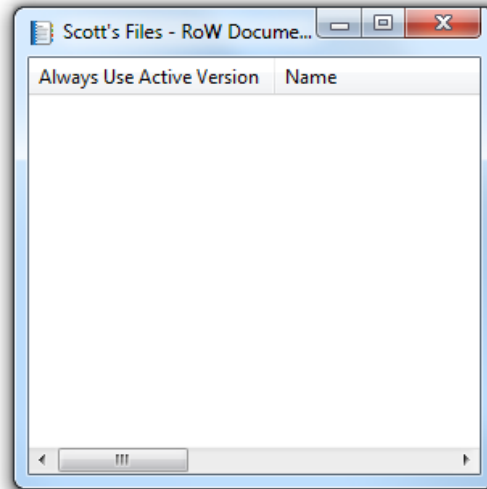
To create a blank Flat Set, select the ProjectWise folder to store the Flat Set in, then select **Document > Set > New**. The **Create Document Set** dialog opens.

Enter the **Name:** and the **Description:** – select **OK**.

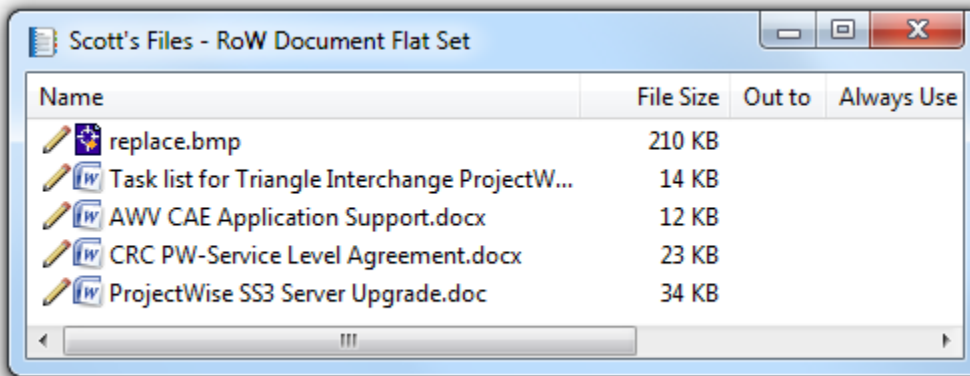


The new Flat Set window appears. You can now drag and drop files from any folder into the Flat Set.

Notice that the window shows the name of the target folder (**Scott's Files**) and the name of the Flat Set.

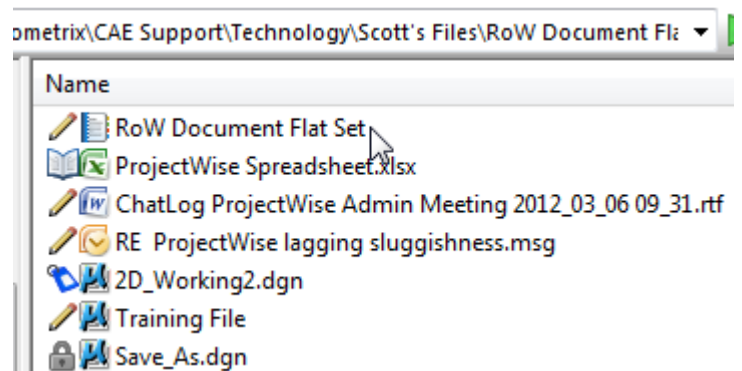


Notice that the window size can be adjusted and the header columns rearranged.

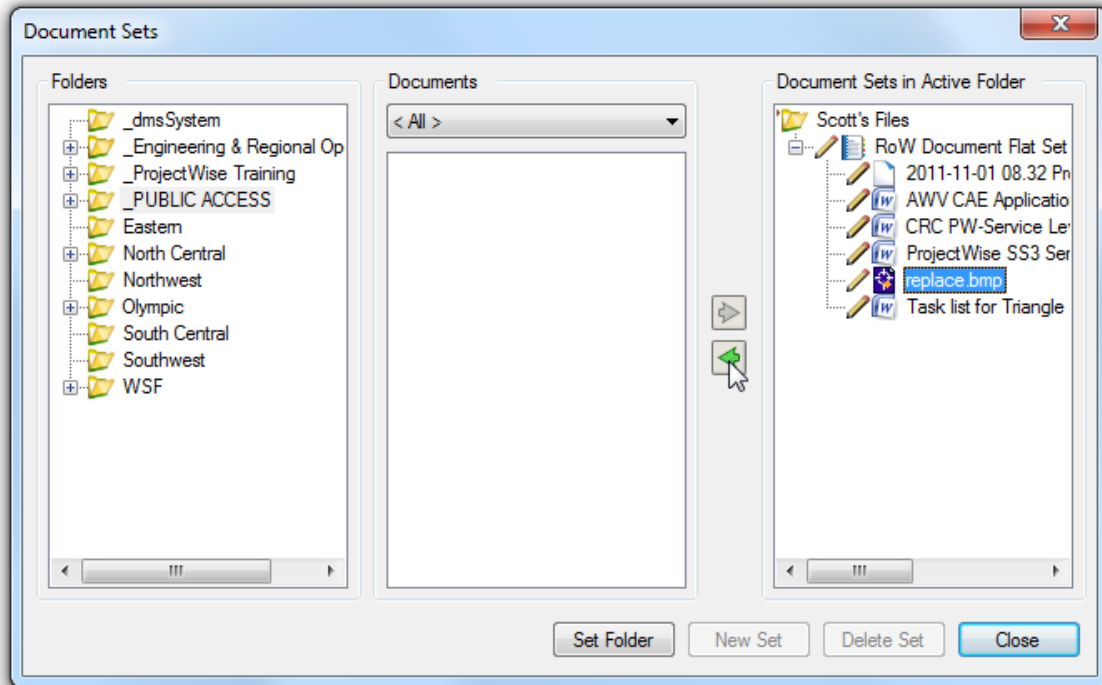


When you close the Flat Set window, it appears in the target folder.

To open a Flat Set, double-click on it.



To add or remove documents of a Flat Set, right-click a Flat Set > **Set** > **Modify...**  
The Document Sets window opens.



To remove a document, select it under **Document Sets in Active Folder**, then click on the green “left” arrow.

You can also add documents to a flat set by scrolling to the appropriate folder in the left panel, then selecting the file within the middle panel and clicking on the “right” arrow. Or you can simply open the flat set and drag and drop files into it.

## Using the Active Version of a Document in Flat Sets

When you add a document to a flat set, you can specify whether the set is always going to include the active version of that document (if additional versions of that document are created after the original document is added to the set), or whether the set is always going to include the version of the document that was active at the time it was added to the set. To control this, the set contents window contains a column with a check box called **Always Use Active Version**. For each document you add to a flat set, simply turn the Always Use Active Version check box on or off as necessary to control which version of the document you want included in the set.

Note the following when adding documents to flat sets:

- The Always Use Active Version check box is only available when the view of the set contents window is set to View > Details.

- The Always Use Active Version check box will be enabled if you add a document that has no versions, or if you add the active version of a document.
- If the Always Use Active Version check box is enabled, the check box will be on or off depending on how your administrator has configured it.
- The Always Use Active Version check box will automatically be disabled (and off) if you add an inactive version of a document.
- Whenever you have a document for which the Always Use Active Version check box is enabled and off, the check box automatically becomes *disabled* then the next time you create a version of that document. This is because the version of the document included in the set (which was formerly either a document with no versions, or the active version) is now an inactive version.

If you have any problems or questions, please contact the **HQ CAE Helpdesk**:  
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360-709-**8013**