Falcon

Document

Management

Software

**VDOT Training Guide For the Windows Document Manager
to be used in conjunction with PowerScope**

Version 1.0

**The Falcon/DMS Document Manager (Introduction)**

The Document Manager is designed to create database records for documents and provide an extensive set of database and document management tools, as well as perform standard file retrieval and check-in tasks. The Document Manager is used in the following environments:

- In Windows, as a general document manager (non-CADD and CADD) and as an extension of the Falcon/DMS Administrator for searching the database, document distribution and archiving, and performing mass database record updates.

- In MicroStation, as an MDL application that manages design files and which is seamlessly integrated with MicroStation's Motif/Windows interface.
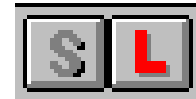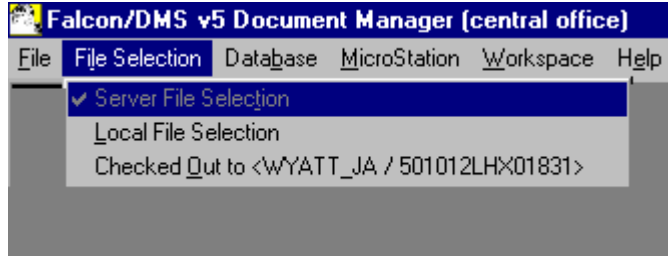
Using the Document Manager

To activate the Document Manager double-click on the shortcut shown above. The Document Manger dialog box will appear.
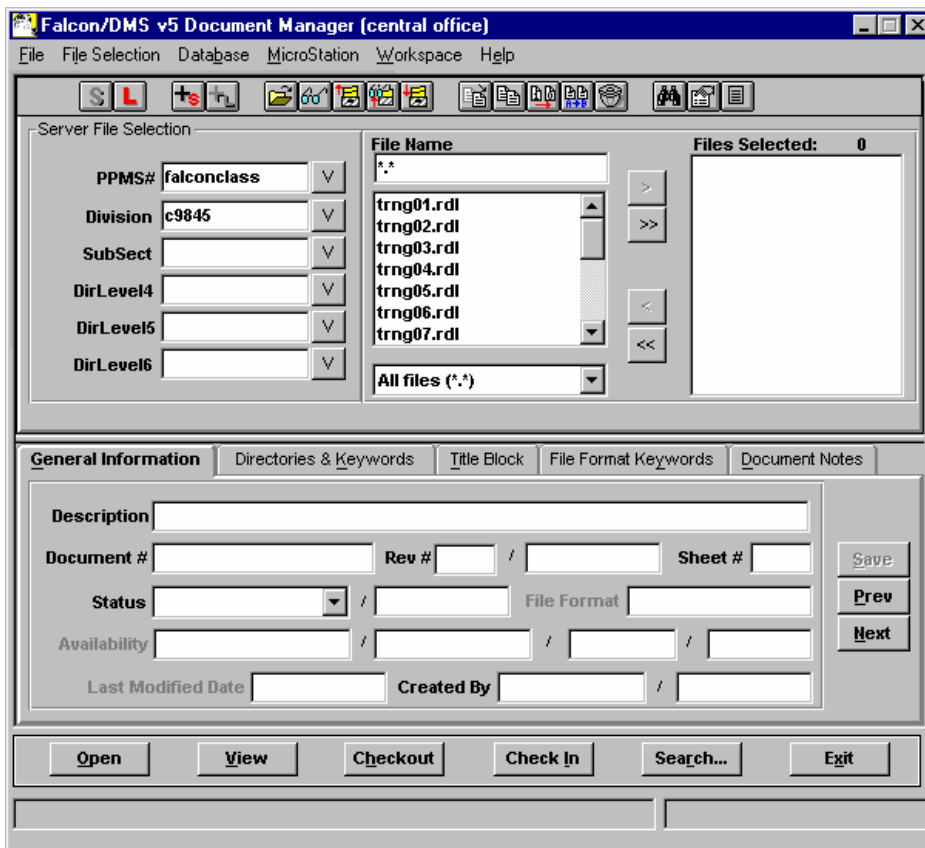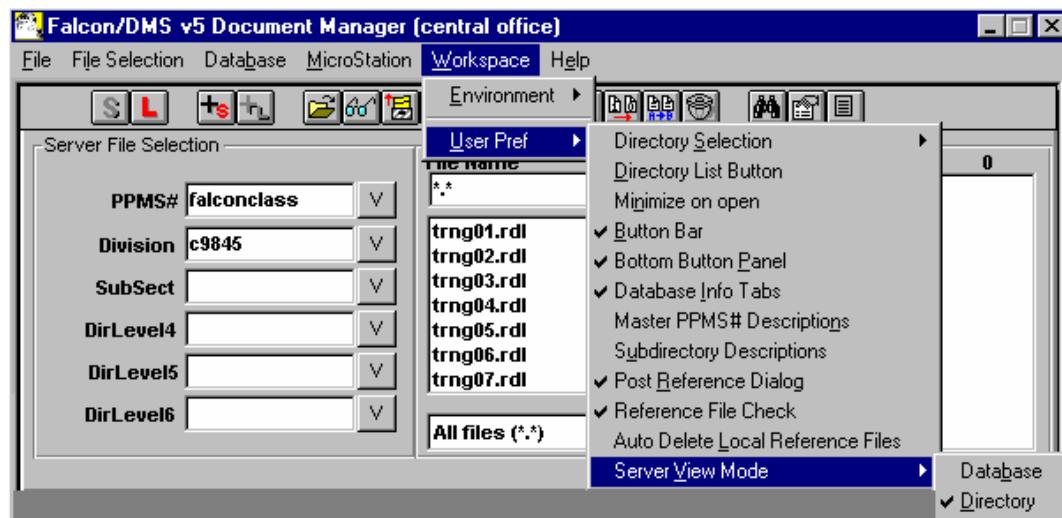
File Selection – Server & Local

There are two File Selection modes. **Server File Selection** mode allows the user to obtain a list of stored files on the server for the selected PPMS# directory. **Local File Selection** mode allows the user to obtain a list of files that are currently checked out to their workstation.
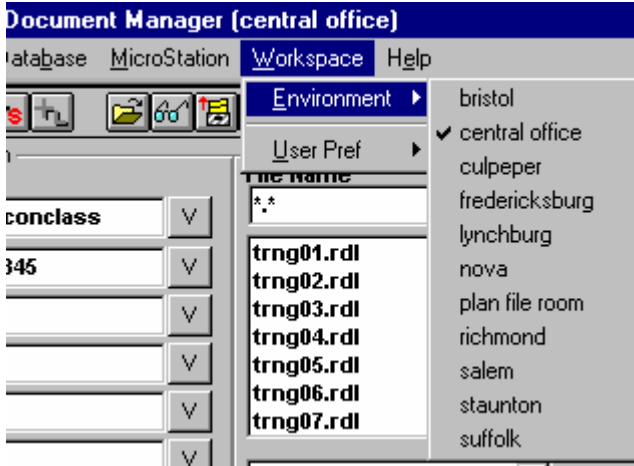
User Preferences

Under **Workspace → User Preferences** is a list of items that the user can set as their own preferences. The most commonly used item is the **Directory List Button**, which inserts a list button on the Document Manager that the user datapoints on to manually generate the list of files. If this is turned off, the list is automatically generated. Another commonly used item is **Server View Mode** that allows the user to generate a list for directory or database. **Directory mode** gives a list of the files on the server whether they have database records or not. **Database mode** provides a list of files that contain records in the database.

These settings should be set to Directory List Button "**Off**" and Server View Mode "**Directory**"

Environments – This option allows the user to see other Districts & the Plan File Room

Viewing MicroStation DGN files with PowerScope.
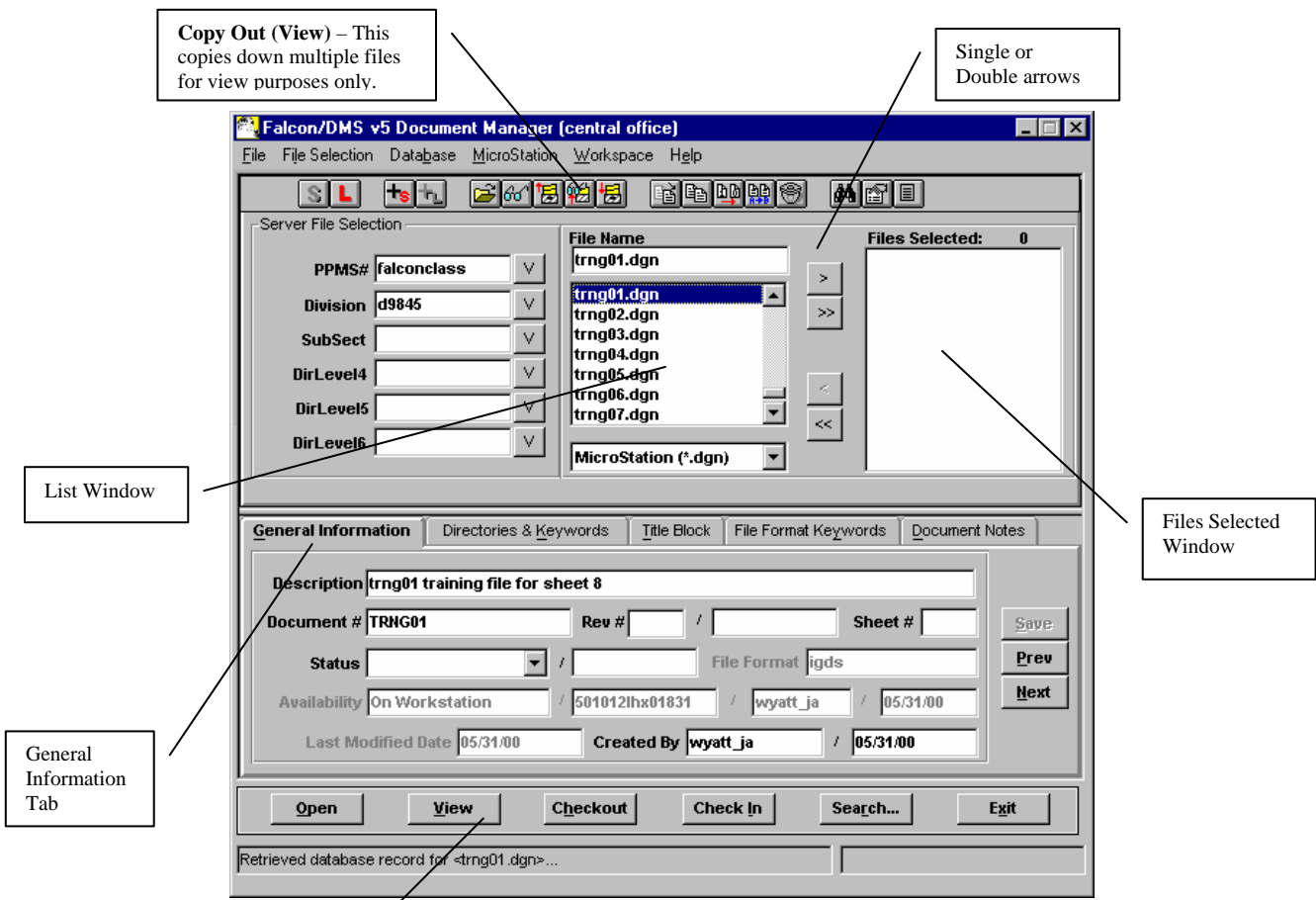
Copy Out (View) – This copies down multiple files for view purposes only.

Single or Double arrows

List Window

Files Selected Window

General Information Tab

View – This copies down a single file for view purposes only.

1. Set the **File Selection** to **Server File Selection**.

2. Change to the directory where the files are located. Choose the **PPMS#** first and then the **Division**. If the file name list does not automatically appear, datapoint on the list button to populate the list of files.

3. Highlight the a MicroStation .dgn file and select **View** for a single file and **Copy Out (View)** for multiple files. Multiple files need to be placed in the **Files Selected Window** before the **Copy Out (View)** command is selected.

4. The PowerScope .rdl file is automatically created and placed in the same local directory as Falcon places the Microstation .dgn file. All attached reference files are copied down as read only at the same time.

Layout of Falcon "Local" Directory Structure and "Server" Directory Structure

<div align="center">

Local   **Server**

</div>
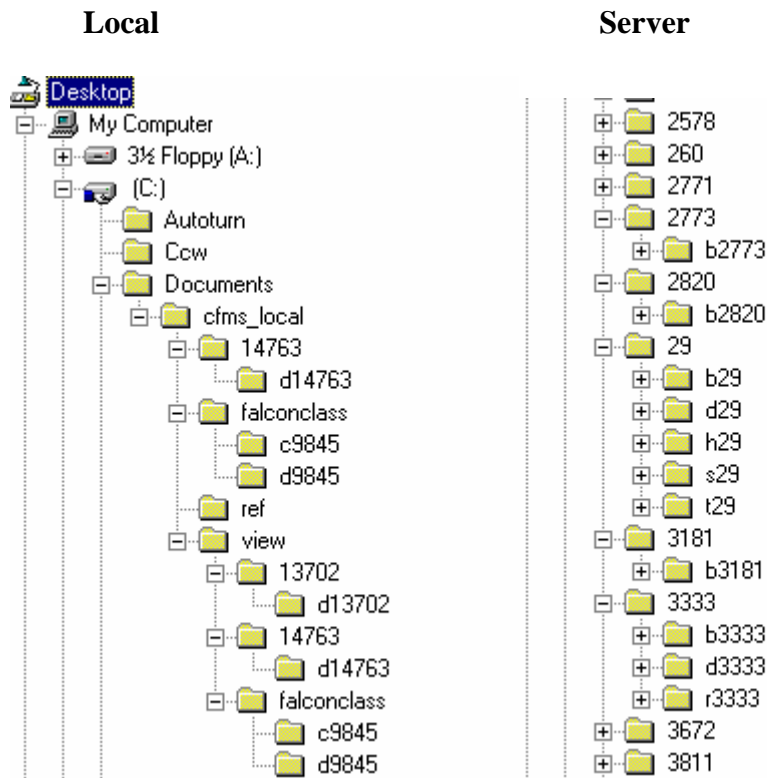
Note: The "Local" directory Structure is created exactly as found on the server starting under the cfms_local folder.
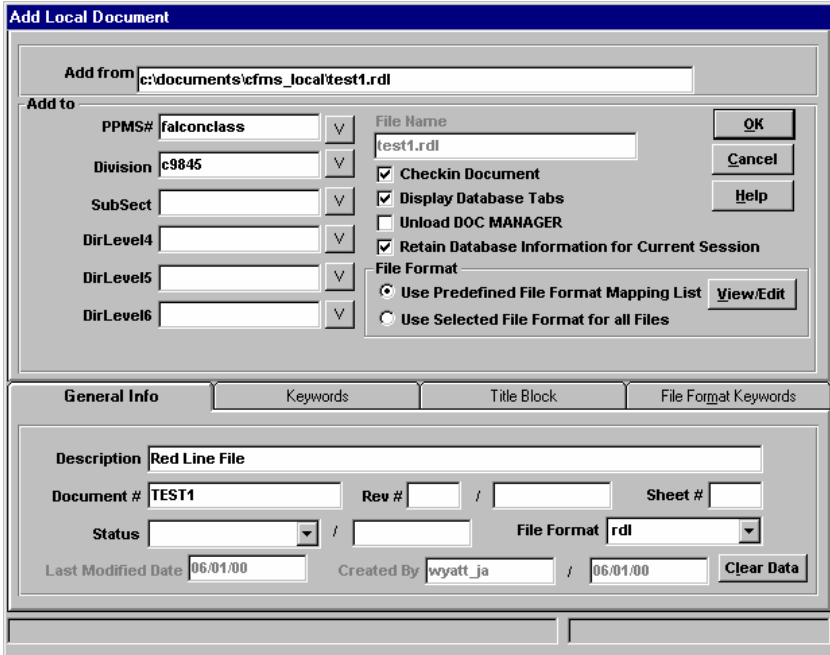
Adding Local files – This action will create a database record and place a copy of the file on the server. Once this is done, the file is ready for check-in and checkout.

1. Go to the Windows NT Explorer and scroll down through the directories to get to c:\documents\cfms_local\view\falconclass\d9845 as shown below:
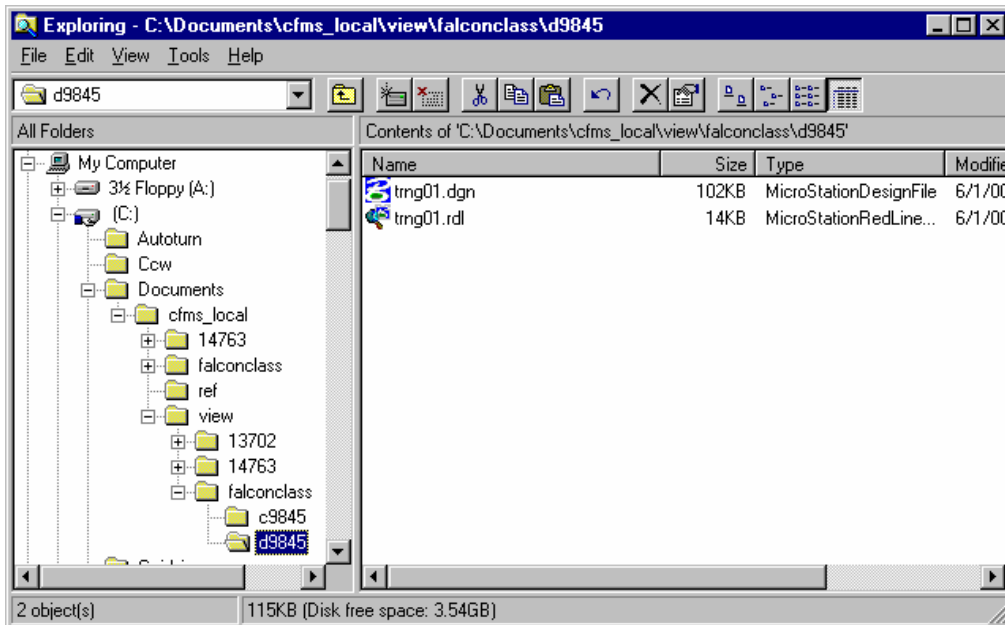
2. Cut trng01.rdl (or the file you created) from this directory and paste it in c:\documents\cfms_local directory, which is three directories up. Rename the file to test01.rdl (use the number of the training account your logged in as part of the file name).

3. Close Windows NT Explorer.

4. Load the Document Manager and switch to the "Local" File Selection.

5. Scroll down through the directories to c:\documents\cfms_local directory.

6. Highlight test01.rdl (or the file you created) and select Add Local from the Pull Down menu or the Button Bar across the top.

7. Set the following in the "Add Local Document" dialog box as shown on the next page:

>   Location→ PPMS→ Division
>   Description
>   Document #
>   File Format → igds

Add Local Document

Add from: `c:\documents\cfms_local\test1.rdl`

Add to
- PPMS# `falconclass`
- Division `c9845`
- SubSect
- DirLevel4
- DirLevel5
- DirLevel6

File Name: `test1.rdl`
- ☑ Checkin Document
- ☑ Display Database Tabs
- ☐ Unload DOC MANAGER
- ☑ Retain Database Information for Current Session

File Format
- ⦿ Use Predefined File Format Mapping List   [View/Edit]
- ○ Use Selected File Format for all Files

[OK] [Cancel] [Help]

Tabs: General Info | Keywords | Title Block | File Format Keywords

- Description `Red Line File`
- Document # `TEST1`   Rev # __ / __   Sheet # __
- Status __ / __   File Format `rdl`
- Last Modified Date `06/01/00`   Created By `wyatt_ja` / `06/01/00`   [Clear Data]

8. Click on "OK". This will take you back to the Document Manager.

Check–in and Checkout

Falcon/DMS v5 Document Manager (central office)

File | File Selection | Database | MicroStation | Workspace | Help

Server File Selection
- PPMS# `falconclass`
- Division `c9845`
- SubSect
- DirLevel4
- DirLevel5
- DirLevel6

File Name: `test1.rdl`

test1.rdl
trng01.rdl
trng02.rdl
trng03.rdl
trng04.rdl
trng05.rdl
trng06.rdl

All files (*.*)

Files Selected: 0

Tabs: General Information | Directories & Keywords | Title Block | File Format Keywords | Document Notes

- Description `Red Line File`
- Document # `TEST1`   Rev # __ / __   Sheet # __
- Status __ / __   File Format `rdl`
- Availability `On Server`
- Last Modified Date `06/01/00`   Created By `wyatt_ja` / `06/01/00`

[Save] [Prev] [Next]

[Open] [View] [Checkout] [Check In] [Search...] [Exit]

Retrieved database record for <test1.rdl>...

1. Set the File Selection to "Server" File Selection.

2. Change to the directory where the files are located. Choose the PPMS# first and then the Division.

3. Highlight the needed file or for multiple files move the files from the "Filename List Window" to the "Files Selected Window".

4. Click on "Open" for a single file and "Checkout" for multiple files.

5. After revisions have been made to the files, place all the files that need to be checked in inside the "Files Selected Window". Select "Check In" and Falcon will place the files back on the server.

Deleting Files
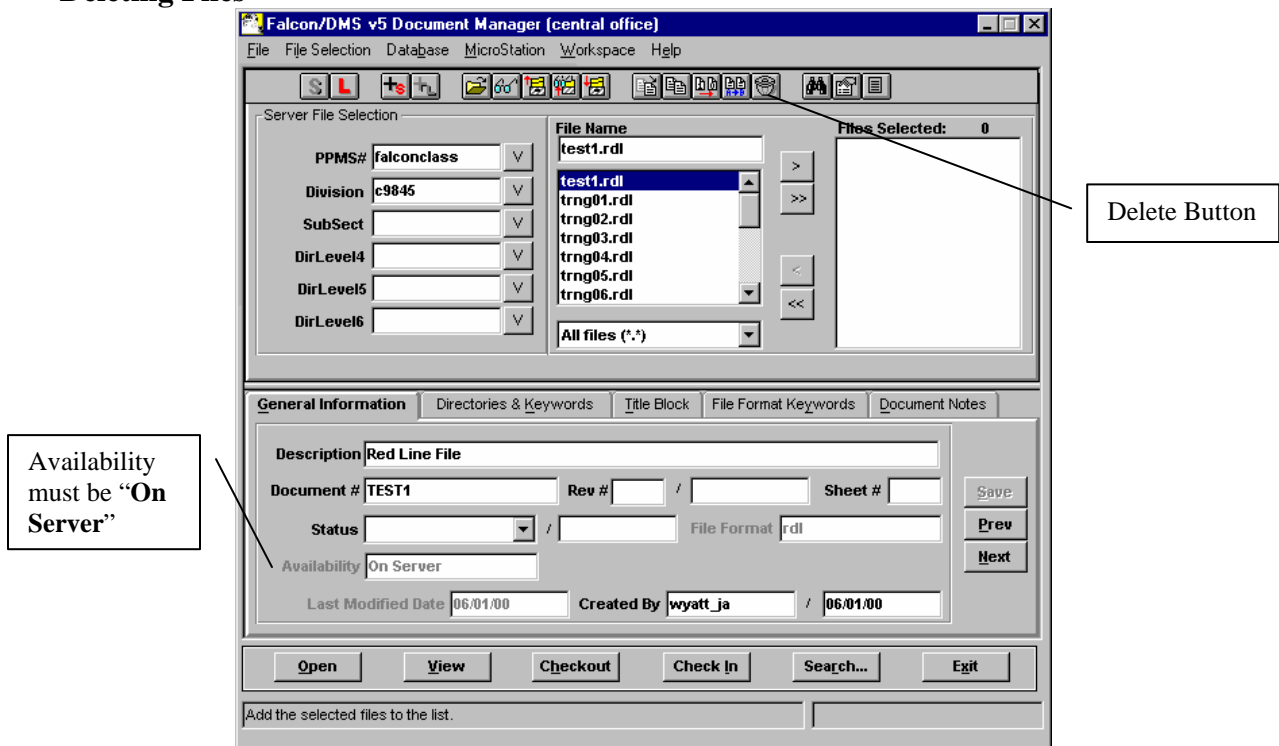
1. Highlight the file that needs to be deleted.

2. Make sure the availability shows "On Server".

3. Select the Delete Button. This will delete the database record and file from the server.
   Note: Do not use explorer to delete any local files in the directory where files are checked out. This will cause a situation where falcon will not check-in or checkout the locally deleted file because the database thinks the files is still checked out to a workstation.

4. To delete multiple files, place the files in the "Files Selected" window and then select the "Delete" Button.