

Attaching ProjectWise Documents to E-mail

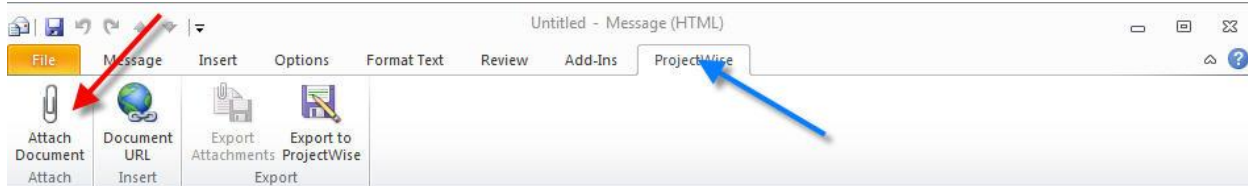
Design Manual
Chapter 21
Automation Tool
Instructions

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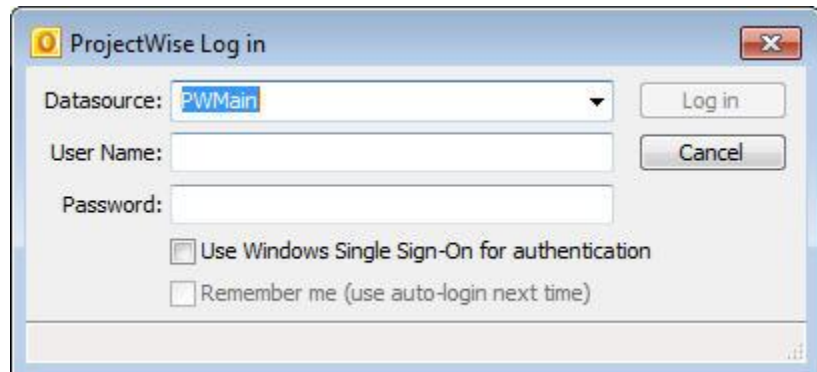
Documents can be attached directly to a Microsoft Outlook message from ProjectWise. This can be done through Outlook if ProjectWise integration is installed and turned on, or directly from ProjectWise Explorer. Documents cannot be attached to an Outlook message from the web client. If using the web client only, the file must be saved to a local drive to attach to the email message.

Attaching a Document to an E-mail from Outlook

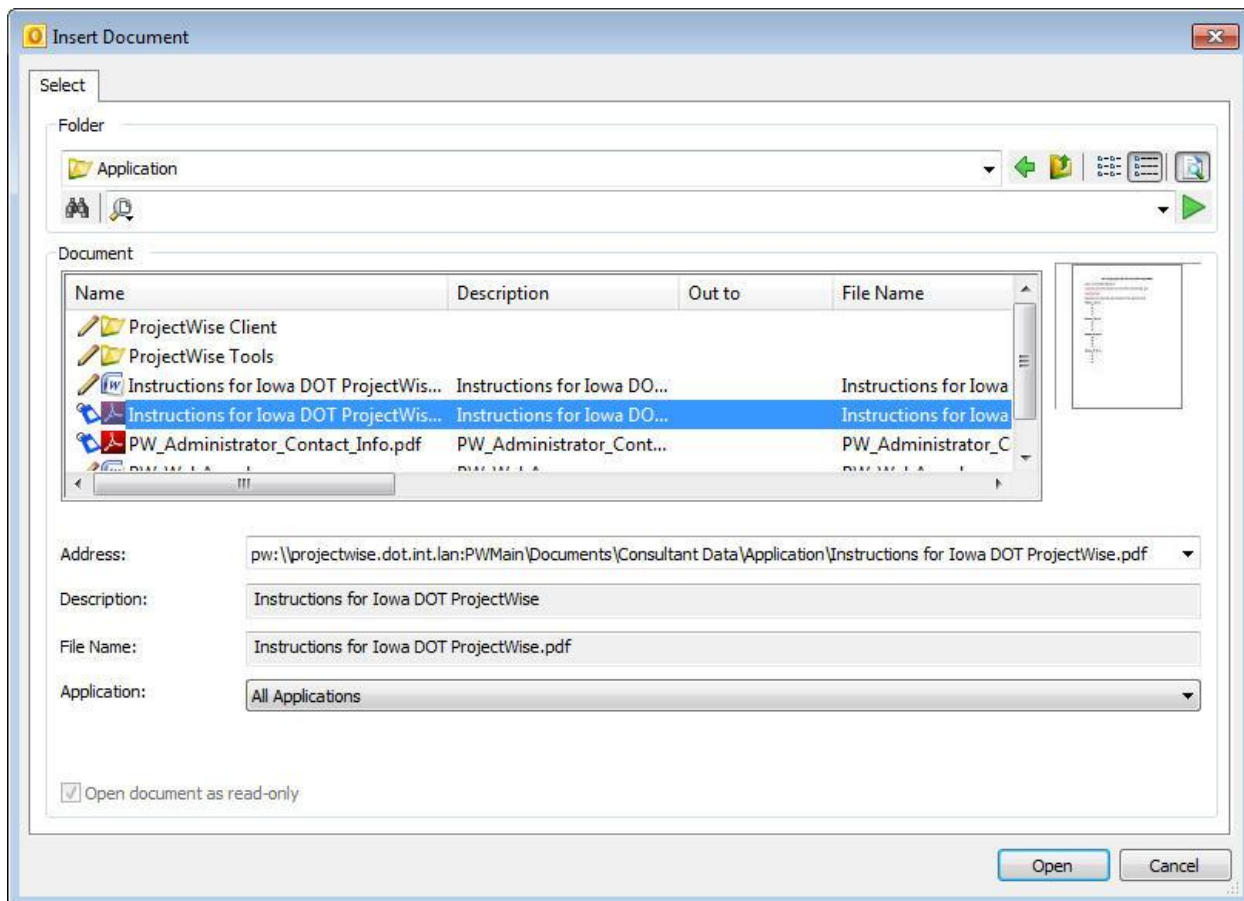
To attach a document to a message using Outlook, ProjectWise integration with Microsoft Office must be installed and activated. If integration is not turned on, the ProjectWise ribbon will not be displayed (blue arrow below). If integration is activated, *Open* the ProjectWise ribbon by *Clicking* on the ProjectWise ribbon in your Outlook message (blue arrow). *Click* on **Attach Document** (red arrow) to initiate the attach document process.



You may be prompted to log into the ProjectWise datasoure. *Select* **PWMain** from the *Datasource* dropdown menu. Fill out the appropriate credentials to log into the Iowa DOT ProjectWise system.

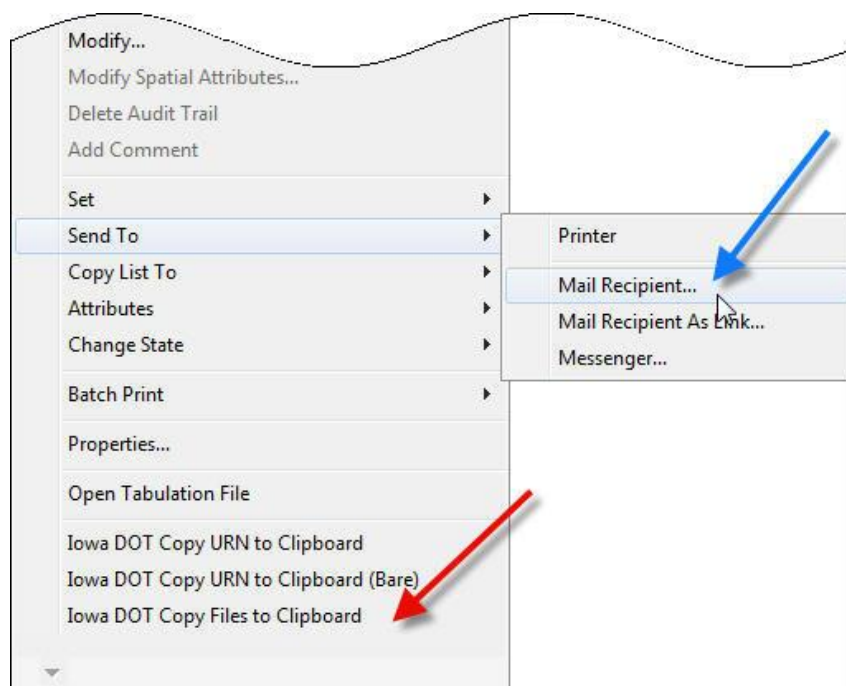
A screenshot of the 'ProjectWise Log in' dialog box. It has a title bar with a yellow icon and the text 'ProjectWise Log in'. The dialog contains a 'Datasource' dropdown menu with 'PWMain' selected. Below it are 'User Name' and 'Password' text boxes. To the right of these are 'Log in' and 'Cancel' buttons. At the bottom, there are two checkboxes: 'Use Windows Single Sign-On for authentication' and 'Remember me (use auto-login next time)'. The dialog has a standard Windows XP-style border.

After logging into the system, you will be prompted to select the document you would like to attach. You can only select one document to attach to the email at a time. Select the document to attach to the email and **Click Open** to attach the document to the email. To attach more documents from ProjectWise, repeat this process for each document that needs to be attached.



Attaching a Document to an E-mail from ProjectWise Explorer

Two methods are available to attach a document to an Outlook message from ProjectWise Explorer: **Send To>Mail Recipient** (blue arrow), and **Iowa DOT Copy Files to Clipboard** (red arrow). Both are accessed from the *Right-Click* menu of the selected document in ProjectWise Explorer.



Send To>Mail Recipient

This option is the standard tool from the out-of-the-box installation of ProjectWise Explorer. By *Clicking on Mail Recipient...* (blue arrow above) from the *Right-Click* menu of a document, an Outlook message will open with the document as an attachment. This option is non-modal and will lock ProjectWise Explorer until the message is either closed or sent to the recipient. Multiple documents can be selected and attached with this method, but after the Outlook message has been opened, no more documents can be attached with this method. This will not attach a document from ProjectWise to an Outlook message that has already been attached.

Iowa DOT Copy Files to Clipboard

This is a custom tool that was developed for the Iowa DOT. By selecting this option (red arrow above) from the *Right-Click* menu of the document(s), ProjectWise Explorer will copy the document into the Windows clipboard. The document can then be *Pasted* into an outlook message by doing a Windows **Paste** command (*Right-Click>Paste* or *Ctrl-V*)

Attaching a Document to E-mail by Exporting

Documents can always be exported from ProjectWise (refer to Section [21F-21](#) for Export instructions), and then attached to an email through normal *drag-and-drop* functionality from a Windows drive location. Documents cannot be *dragged-and-dropped* from ProjectWise Explorer into an Outlook message. The standard function of *drag-and-drop* from ProjectWise Explorer to a Windows drive location is to create a shortcut to the selected ProjectWise Document.

Chronology of Changes to Design Manual Section:

021F-023 [Attaching ProjectWise Documents to E-mail](#)

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