

DDM 2010 FOLDERS

DREW ENGINEERING

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Authored by: Michael Drew

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Overview

This describes how to work in group owned folders where group members can reserve single or multiple items to their workbench without having to take ownership of the group folder. The advantage to setting up and working this way gives you tracking, prevention of overwrites, and keeps everything nice and neat on your workbench when working on multiple projects. This is a preferred way of working in folders with group ownership and we suggest that you use this process and have all users' work the same way where you can receive the full benefits of group owned folders.

Create a Folder

From the DDM Office interface we want you to create a folder by expanding the Folders to reveal the different type of Folders available to you! Out of the box DDM comes with Default Project, Workbench, and Send Folder. Some of you may have created your own templates in the DDM admin tool using the built-in tools to do so. These will show up here in the folder list along with the default ones.

- Select the *folder type* and right hand click and create *new*.
- Populate the Folder Name manually or use the automated numbering tool if you have it set up to assign folder numbers.
- Set the work State (auto-populate). This is all that is required to create a folder.
- Optional but suggested, Fill in any blanks shaded blue. DDM auto populates the ones shaded gray or white.
- Click on the *check mark* or *OK* to save.
- You then get a message from DDM asking if you want to set this folder as your current working folder. Click on *yes*! By clicking yes, you can now add data to this folder reserving from the search results in DDM, by importing, or by dragging and dropping. Because this folder is set to your current working folder all data will populate here. (If you clicked *no* here all items would go to your workbench or to whatever you had set as the current working folder.)
- Add the data you want to get in this folder by *reserving* from DDM search results, importing directly into this folder, or by dragging and dropping.
- Once all the data is in you will want to send this folder to group ownership. To do this from the folder, click on “*send folder to*” icon on the folder menu bar.
- Now select the group or person to send it to in the pull down. We suggest you use the *Project Members (Role)*. When you do this it changes the ownership of the folder from you to the Project Members and sets your workbench as the current working folder. Send to Routing List for custom workflows.
- You have now created a group owned folder with data in it.

Working on Files in a Group Owned Folder

As this is a group owned folder, there will always be a need to grab files and work on it. If you took ownership of the folder, the other users would not be able to work on it. So we have come up with a process to getting files back and forth between group owned folders and user workbenches. In DDM, there are two rules to remember: 1) When making a change you must reserve that object 2) It should be in your working folder which you do by setting current from that folder. I now want to make a change to a file or files that are in a group owned folder. We suggest that you create a Folder Divider in your workbench and name it the same as the Folder but add work area to the name. So if you have a project called XYZ, create a Folder Divider in your workbench called XYZ and description of XYZ Work area. By doing this for each folder group you work on it keeps your workbench organized. I do not suggest that you use the admin tool to automatically create these as you will want to remove them when you are done or the project is closed. You can do it several ways.

- From your Workbench, right click on the *search results area* and create *new* Folder Divider. Match the folder name you want to work from and the description is the “folder name” work area.
- Or from the Workbench, **file, new. Folder Divider**.

To get that data to that working folder:

- Have both Folders open and drag and drop from the Group owned folder to your workbench Folder Divider with the same name.
- Once you have moved them to your workbench folder divider, reserve them.

Once in there to move back and forth between groups owned folders and your workbench is simply reserving from the folder you to move into to. The reason being once you remove it from the group owned folder, it leaves a reference file in its place. You just right click the *reference* and *reserve* it back after working on it.

This is a real simple way to manage files in a group owned environment without ever having to take ownership from the group.

In the group owned folder and workbench, make sure you have the attributes *reserved in* and *reserved by* turned on as it will help you see ownership.

Create a favorite of the Folder Search

By having this search set to a favorite you can click on the *favorite*, select the *search* and see immediately all the files in it and who has ownership. So if someone has files on their workbench, DDM will tell you and you will find this very useful in group owned folders. You must perform the search this way to get the desired results.

Click on *all items* from DDM Office, *clear* the search in the menu bar, *populate* the folder type from a *pull down* in the general tab, and *select* the name of the folder. Now click on *search* on the menu bar. You will now see the results on the screen. To add this search to your favorites, click on *Favorites* from the top tool bar pull down (not the favorites on the left side) and click on *add to favorites* and type in the “*folder name*”.