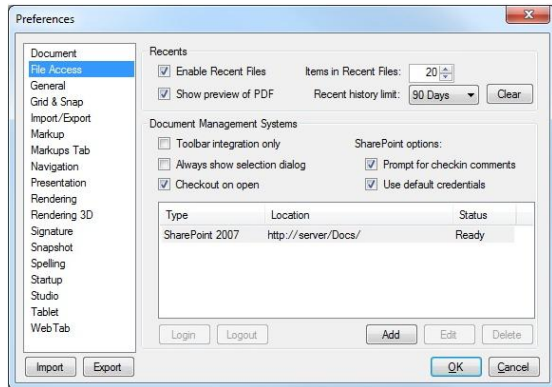


# Revu Tutorial: SharePoint & ProjectWise Integration

Revu has direct integration into Bentley® ProjectWise® and Microsoft® SharePoint® document management systems. You can Check-In, Checkout and view files from either a ProjectWise DataSource or SharePoint Document Library directly from within the Revu interface. This tutorial will show you how to configure and use this integration.

## Create Login

To begin, go to *Edit/Preferences/ File Access*, or use keyboard shortcut "Ctrl + K". Here you can add Login and Account information for ProjectWise or SharePoint. To setup a login click **Add**, choose the system from the drop-down list and enter your login name and password. Revu can store login data to suppress any future prompts.



## Configure

Revu enables you to manage the integration level when retrieving files from a document management system. Options are controlled by checking or un-checking the boxes next to each functionality.

**Toolbar integration only** is the most seamless integration option. Check the box to prevent prompts from displaying when opening or saving a file from the File menu or toolbar. Instead, use the Document Management toolbar for accessing files, found under *View/Toolbars*.

**Always show selection dialog** will prompt you to select between saving to a local source or a document management system.

**Checkout on open** will always perform the checkout operation for any file accessed from a document management system.

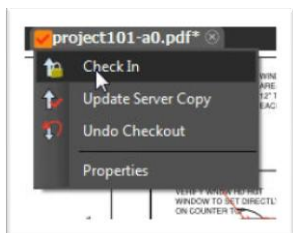
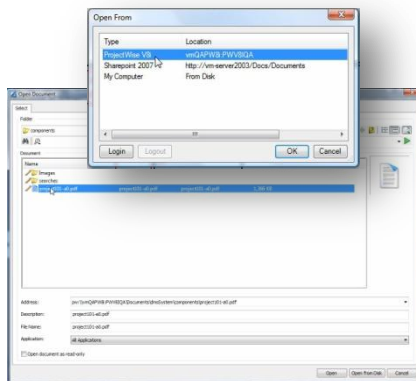
**Prompt for check-in comments** displays a dialog that allows adding comments to the document management system during the check in operation.

**Use default credentials** will use your Windows account login credentials first whenever you login to a SharePoint site. If the login fails, you will then be prompted to enter credentials for that site. If you generally only work with SharePoint sites in which your Windows login credentials are not valid, you may wish to turn this option off to improve SharePoint login performance.

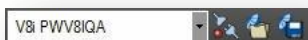


## File Operation

With the document management settings in their default state as shown, accessing files from either system is seamless. Upon selecting *File/Open*, you are initially prompted to select from the list of document management systems you are connected to, in this case both. Once selected, you will be placed directly into the system's Open Document dialog, such as the ProjectWise DataSource. Based on the settings, opening the file automatically performs a checkout operation when opening in Revu. In this case, this is indicated by a red checkmark placed next to the file name tab in the interface. Now the file is ready for adding markups or editing as part of your workflow.



After you have finished editing the PDF document, click on the red checkmark in the File Name tab to display the various file options. Here you can select **Check-In**, **Update Server Copy**, **Undo Checkout** or view the file **Properties**. After you check-in the file, the file name symbol will change to a yellow padlock indicating that it has been locked and now resides back in the document management system.



With **Toolbar Integration Only** selected, file operations such as **Open** or **Save As** will bypass the document management systems and only access native or local files. To access files in either of the document management systems, use the **Document Management Toolbar** icons. To display the toolbar go to *View/Toolbars/Document Management*.

