



PROJECT SHARING: GETTING STARTED GUIDE

PROJECT SHARING ACRONYMS

VWX	Vectorworks Document (.vwx)
PS	Project Sharing
PF	Project File (.vwxp)
WF	Working File (.vwxw)
S+C	Save and Commit
C+R	Close and Release
VCS	Vectorworks Cloud Services

PROJECT SETUP TIPS

- The benefits of PS depend on the type of project and file structure.
- PS is helpful for many workflows, but not the answer for every workflow.
- Start the process by testing a single project.
- Each project team member must use the same version and update of Vectorworks.
- Wired network connections are faster and more robust than WiFi, and therefore recommended.
- [This article](#) steps you through the process of setting up PS, and the Vectorworks University course it references gives you a well-rounded understanding of the concepts involved.





PROJECT FILE DO'S AND DON'TS

- The server and local computers MUST use the SMB file structure. Do NOT use a combination of SMB and AFP structures. (AFP has been deprecated on macOS.)
- You must have full read/write/delete/rename access permissions to the project folder, subfolders, and PFs.
- Do NOT duplicate or copy your PF.
- Do NOT rename the PF.
- Do NOT move your PF or rename folders that contain your PF.

NOTE 1: Once created, a PF is not opened. Double-clicking on a PF, creates a WF. A WF is a 'working' duplicate of the PF.)

NOTE 2: The PF does not track how many WFs exist or what version they are at.

NOTES FOR PROJECT SHARING ADMINISTRATORS

- *If a Project Administrator releases someone else's exclusive lock, that user will be unable to commit their work.*
(A Project Sharing Administrator should be aware of this side-effect!)
- Vectorworks shows the following alert when an Administrator tries to release another user's Working File.
The Working File user will lose any new work in their file and will have to copy and paste their work into a new Working File.

CHECKING OUT OBJECTS FROM THE PROJECT FILE

When checking out drawing objects, best practice is for each team member to:

- Check out Design Layers (as opposed to editing or adding individual objects).
- Do not check out the entire Sheet Layers, but only Sheet Layer Viewports .
(This enables Title Block Border objects to be edited en-masse via the File > Title Block Manager command.)

NOTE 3: Checking out individual objects requires more bandwidth to and from the PF. Each time an object is edited, the WF needs to communicate with the PF.





WORKING FILE SAVING + COMMITTING REGIME

- A saving and committing regime needs need to established.
- Such as:
 - Refresh WFs at the start of the work day, and after lunch.
 - S+C WFs before lunch, and at the end of the work day.

WORKING FILE DO'S AND DON'TS

- A WF is a 'working' duplicate of the PF.
- Save your WF to your local hard drive.
- Do NOT save your WF on a server.
- Do NOT save your WF on Dropbox or cloud service.
- Do NOT duplicate or copy your WF.
- If there are any issues with syncing your WF, you can always save-a-copy as a VWX.
- Use ONE WF per user (where each machine uses a unique user login name).
- If a team member is using two machines (for example, one at work, and another at home), use a separate WF for each machine, and ensure each machine uses a unique user login name.
- To work offline and/or remotely, check out Design Layers and Sheet Viewports before going offline.
- Choosing File > Save, only saves WF changes to your WF.
- Choosing File > Save, and Commit saves changes from your WF to the PF.
- Choosing File > Close and Release, releases any layer or objects you've checked out to your WF back to the PF.
- Choosing File > Close and Release, reverts any edits or additions in the WF back to the current state of the PF.



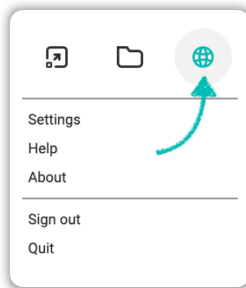


VECTORWORKS CLOUD SERVICES FOLDER SHARING SETUP.

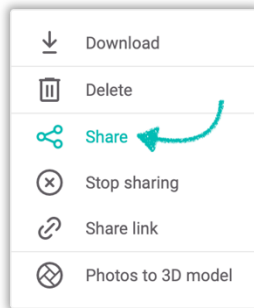
NOTE 4: Due to the way Vectorworks optimises the S+C process, a folder containing the PF should be shared, never only the PF itself.

To share a folder via VCS:

1. Select the VCS widget (in the Menu Bar on macOS, or via the Task Bar on Windows).
2. Select the VCS web portal icon. This opens the VCS Portal in your default web browser.



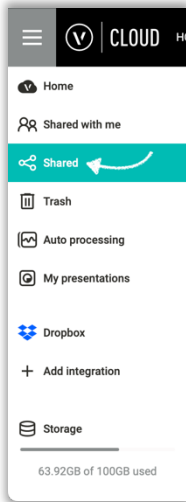
3. In the Web Portal, create a folder with an appropriate name in your desired folder path location.
4. Right-click on the newly created folder you wish to share.



5. Choose Share. Enter the email addresses of project team members and select 'OK'. (You can repeat this process to add more team members at a later point in time.)

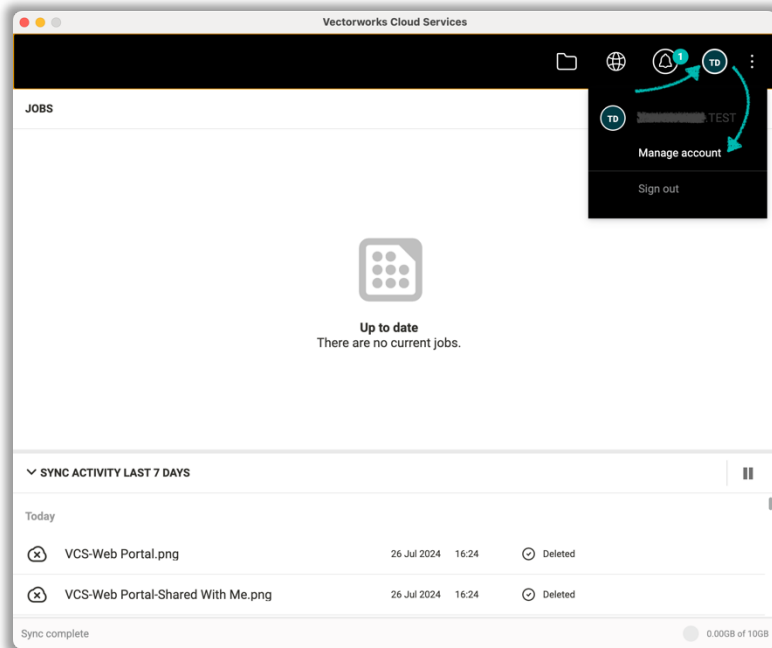


6. This folder will now appear in the 'Shared' section of the VCS Web Portal.



NOTE 5: The email address used by team members should be associated with their Vectorworks Customer Account. To do so:

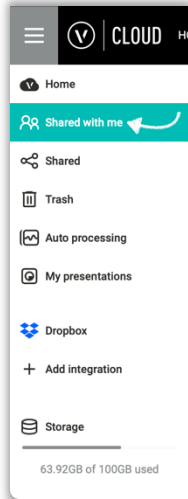
- In the VCS app, select your name initials icon.
- Choose 'Manage Account'.
- Under 'Contact Info', select 'Add New' to add as many email addresses as required.



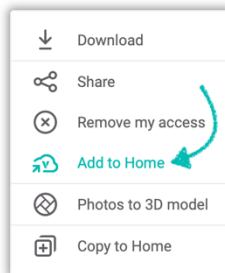


To manage folders shared with you:

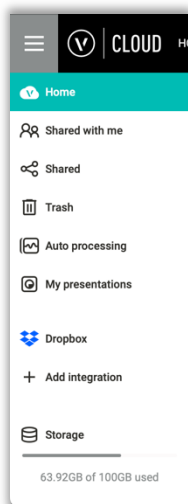
1. In the VCS Web Portal, the shared folder will now appear in 'Shared with me'.



2. Right-click on the shared folder, choose 'Add to Home', and select a location (within VCS) for the shared folder to reside. Click 'Select'.



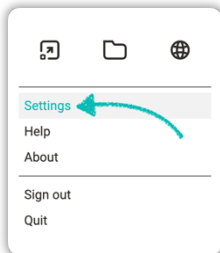
3. In the 'Home' section of the Web Portal, you can now navigate to this shared folder.



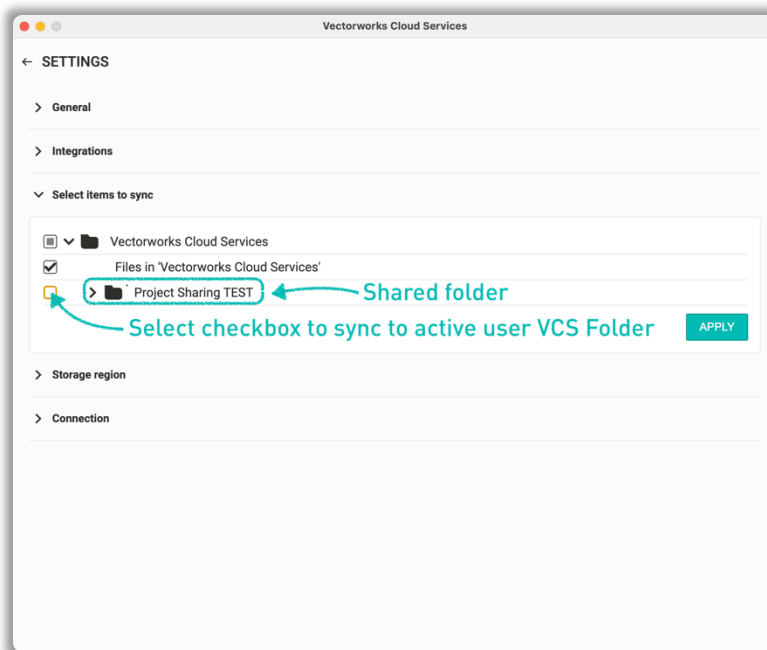


To sync a (shared) folder to your local machine:

1. Select the VCS widget.
2. Choose Settings.



3. Select 'Select Items to Sync'
4. Select the checkbox next to the folder name, so a checkmark is displayed.
(Select the expansion arrow next to a folder to reveal nested folders).





5. VCS will then download this folder locally to your machine's VCS Folder.

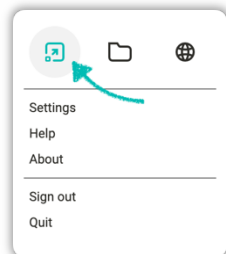




VECTORWORKS CLOUD SERVICES WORKFLOW

To share a PF via VCS, you should be following this protocol:

1. Copy a .VWX file into that folder, then convert to PF (via File > Project Sharing).
(When setting up PS, use SMB.)
2. Allow the PF to sync to each team members machine.
3. Team members create their WFs by double-clicking on the PF, and save it locally on their machine.
4. The WF is identified by the username of the machine. Therefore:
 - If a single user is using multiple machines, separate WFs will need to be created for each machine.
 - Each machine will need to have unique user login names to prevent WF permissions clashes.
5. The PF cannot be renamed, replaced or in any other way altered, other than via interaction with the various WF's.
6. Ensure VCS has finished syncing the PF before checking items out, or S+C. VCS sync activity is shown via the VCS Widget.
 - Sync complete 
 - Sync in progress 
 - Specific file sync progress is displayed in the VCS Status dialogue (accessed via VCS Widget).



7. Before S+C back to the PF, refresh the WF. This removes one step from the S+C process, and makes the overall S+C process faster.
8. If one file is not syncing, after refreshing all WFs and S+C, you can also choose the 'Run Project Sharing Metadata Diagnostics' command (in the Tools > Utilities menu).
9. If the issue persists, please contact us at Technical Support.

NOTE 6: VCS is our preferred PS workflow. Because Vectorworks' controls its entire technology stack, it is more robust.





OTHER CLOUD SERVICES WORKFLOW

For other cloud services (such as Dropbox), in addition to the above VCS workflow, you should be following this protocol:

1. Ensure your cloud service application is up to date, and auto-updates are turned on.
2. For the shared folder containing the PF, ensure each team chooses the preference, 'Make Available Offline'. (Typically by right-clicking on the folder and choosing 'Make Available Offline' from the pop-up menu).
3. Ensure the cloud service has finished syncing the PF before checking items out, or S+C.