



**MANAGER GUIDE**

**TIMS3**

**Document Management Software**

## Disclaimer

Giffels Associates Limited makes no representation or warranties of any kind with respect to the contents of this document and specifically disclaims any implied warranties of merchantability and fitness for any particular purpose. Giffels reserves the right to revise this publication without notice. Under no circumstances shall Giffels Associates Limited be responsible for consequential, incidental, special or indirect damages arising out of the use of, or inability to use this document or any products referenced herein. The user is hereby solely responsible for assessing their needs.

The screen displays depicted herein are meant to be representative and not exact duplicates of those that will appear on your monitor.

## Trademarks

PROJECT NAVIGATOR is a trademark of GIFFELS ASSOCIATES LIMITED.

Intergraph, IGDS, CLIX, and CLIPPER are registered trademarks of Intergraph Corporation.

MicroStation is a trademark of Bentley Systems, Inc., an Intergraph affiliate. Other brands and product names are trademarks or registered trademarks of their respective owners.

## Copyright Notice

© Copyright 2000, GIFFELS ASSOCIATES LIMITED. All rights reserved.

---



## **Preface**

This document is intended to serve as a supplement to the classroom training session presented by Giffels Associates Limited. Much of the instructional value of this document will be lost without the coaching and instruction of a qualified Giffels instructor.

Contained in this guide are course objectives, student learning aids, student self evaluation, course evaluation and exercises completed during the training program. There are also references to particular sections of the TIMS documentation supplied with the TIMS software. Students are encouraged to refer to these other sections for more information about particular topics.

---



## Table of Contents

TIMS Systems Administrator Training Course Objectives.....	7
TIMS Manager Training Course Objectives .....	7
TIMS NT System Administrator Duties.....	8
NT User and Groups.....	9
Adding a user to an NT Domain.....	9
Adding a group to an NT Domain .....	9
Managing the Database .....	10
Project Navigator Database Setup .....	10
TIMS Data Manager Database Setup .....	11
Reference File Logicals .....	15
TIMS Database Structure .....	16
Repairing TIMSDATA (MS Access option only).....	17
Duties of a TIMS Manager.....	18
Manage projects.....	19
TIMS Security .....	24
User Privilege Levels.....	24
User Access Rights.....	27
Manage the Maintenance Tables and System Configuration .....	30
Managing the File Transfer Logs .....	33
Trouble Shooting.....	33
To Fix: Option 1 .....	35
To Fix: Option 2.....	35
Review Topics.....	36

---



## TIMS Systems Administrator Training Course Objectives

Perform NT Systems Administer duties as related to TIMS

- Control and troubleshoot reference file logical name issues
- Locate the main TIMS program files for installation and modification
- Understand the TIMS database structure and unique keys
- Manage lookup lists (e.g. titles, file extensions, project status)
- Create custom document fields
- Create add-in custom tools
- Setup NT user login and file security as it relates to TIMS file check in/out
- Use ODBC 32 to create and manage a data source
- Compact and repair the TIMS database

## TIMS Manager Training Course Objectives

**Upon successful completion of this training course user will be able to:**

Perform the TIMS Managers Duties to:

- Manage project information in the Projects Table
  - Setup Data Access Rights (permissions)
  - Modify maintenance table data
  - Check the file transfer audit log
  - Identify and use the file transfer checkout log
-

## TIMS NT System Administrator Duties

Things you should know before starting this section:

- Node Name (TCP/IP hostname) of the File Server
- Node Name (TCP/IP hostname) of the Database Server

In this section you will be able to:

- Add new users and groups to an NT domain
  - Locate the TIMS File server(s) and the Database server
  - Install TIMS System files
  - Perform trouble shooting on:
    - Reference file logicals
    - TIMS Program files
  - Compact and repair the TIMS database
-

## NT User and Groups

- The TIMS users are defined by the NT operating system
- Each user must first be given an NT login
- Each user must be associated with one or more NT groups and their primary NT group chosen carefully
- Users and groups are set up by the NT Administrator
- Once the NT users and groups are set up they can be added to the TIMS User Privilege table (can actually be added before they are created if username is known)

### Adding a user to an NT Domain

Login in as the Administrator

Locate and startup the Administrator Tools

Open User Manager for Domains (servers only)

Select User>New User

Add the new username and other pertinent information

Click on *groups* and select the group or groups to associate with the username

Click on *profile* to assign a users home directory

### Adding a group to an NT Domain

Login in as the Administrator

Locate and startup the Administrator Tools

Open User Manager for Domains (servers only)

Select Group>New group Groups

Add in a new group name

---

## Managing the Database

- With the MS Access version of TIMS the database is a single MDB file
- The file called TIMSDATA.MDB must be accessible by all client workstations through a shared drive connection.
- When the Database server is installed to the default directory it will be located in the C:\WIN32APP\TIMSV3\TIMSDATA directory.
- It is required that the C:\WIN32APP\TIMSV3\TIMSDATA directory or a similar location be set up as a share for everyone to have full access.
- This share point should then be mapped as a drive letter on each client workstation that needs to access TIMS (drive letter T: for TIMS is suggested)

## Project Navigator Database Setup

- Project Navigator requires a 32bit ODBC System DSN to be defined (done during installation). Using the **Control Panel**, open **32bit ODBC** and click on the **System DSN** button (TIMS or TIMSAccess should not exist in the User or File DSN tabs)
  - Select TIMSAccess (Microsoft Access Driver (\*.mdb)) and click on Configure. Do not change the name from TIMSAccess; the software is hard coded to locate this DSN name. Click on Select and select the database file to be used (e.g. T:\timsdata.mdb). Click **OK** and **Close** all dialog boxes
  - OR -
  - Select TIMS (SQL Server) and click on Configure. Do not change the name from TIMS; the software is hard coded to locate this DSN name. Ensure the SQL Server name is correct. If the login ID will be verified with SQL Server authentication, then ensure that it connects with the Login ID of 'timsuser' with no password. Ensure that the correct network library is used (TCP/IP or NamedPipes). The default database should specify 'tims' and you might wish to turn **OFF** the option to 'Create temporary stored procedures for prepared SQL statements' and to turn **ON** the option to 'Perform translation for character data'. Test the Data Source to ensure it is successful and then close all dialogs.
-

### **TIMS Data Manager Database Setup**

- During the first usage of the TIMS Data Manager after installation the Data Manager application prompts for the location of the database containing all the TIMS project, document, company and contact data [TIMSDATA.MDB]
  - This information is stored into the TIMS Data Manager application (TIMS.MDE) so it does not prompt on the second and subsequent use.
  - If there is a need to relocate the database for the TIMS Data Manager: you must remove/rename the old TIMSDATA.MDB then during the next restart of TIMS Data Manager you will again be prompted to identify the new location of the database. Or, alternatively, you may press CTRL-A at the main TIMS Data Manager Menu to open a dialog to allow you to reselect the database and force it to renew its (cached) pointers to the database.
-

**Exercise:****➤ Locating the TIMS Database:**

1. Open the 32-bit ODBC option from Windows Control Panel.
2. Locate the System DSN.
3. Select TIMS (MS SQL Server) or TIMSAccess (MS Access).
4. Check that this is using the correct TIMSDATA.MDB (MS Access) or SQL Server with correct DB Library type (TCP/IP, NamedPipes, etc).

**➤ Installing TIMS:**

1. Insert the CD-ROM in the drive and the TIMS Installation process will start automatically. To manually start the TIMS installation runs the setup.exe in the root directory on the CD-ROM.
2. From the dialog that appears select the TIMS Client icon.
3. Select the TYPICAL option for Project Navigator and TIMS Data Manager installation.
4. Select MINIMUM for Project Navigator only.
5. You will be prompted for the following:
  - directory for MicroStation
  - Node name (this is the Database server name)
  - Services id: (usually 1493-check first with NT services to ensure this number has not already been used)
  - Local client working directory/branch for all project files to be transferred to

**➤ Changing the location of TIMSDATA.MDB (MS Access only):**

1. Move the TIMSDATA.MDB file to a new location (move the old one out of the way by un-mounting the drive location or renaming it)
  2. Open the 32 bit ODBC option from Windows Control Panel, access the System DSN tab and configure the TIMS/TIMSAccess DSN. For Access select the file location using the dialog button provided.
  3. Startup TIMS Data Manager. When prompted locate TIMSDATA.MDB.
-

➤ **Create new NT logons and run TIMS as these new users:**

1. Create a number of logons with different NT domain groups as the primary group using the User Manager for Domains utility.
2. Logon with each of these accounts and run the Project Navigator and then examine the username entries that are created automatically by the system, noticing how the primary group is placed first in the list of groupnames for this user logon and how each is defaulted to be a User / Operator.
3. Before logging on and running TIMS with a new account name, experiment by adding these usernames to the TIMS User Privilege table, adding the logon name, setting the level to Reviewer or None or TIMS Manager, and leave the groupnames field blank, or pre-fill it with some groupnames. Now when you run TIMS for the first time as these accounts, notice how the blank groupname fields are filled with the NT domain groups for the logon and how the non-blank groupname fields are NOT filled with NT domain groups for the logon. In both cases, the level remains as whatever has been pre-set earlier. This is how you can predefine the user operator levels before the TIMS software creates user accounts automatically during first-time usage.

➤ **Add users to additional NT domain groups to allow them to access documents from other departments (groups):**

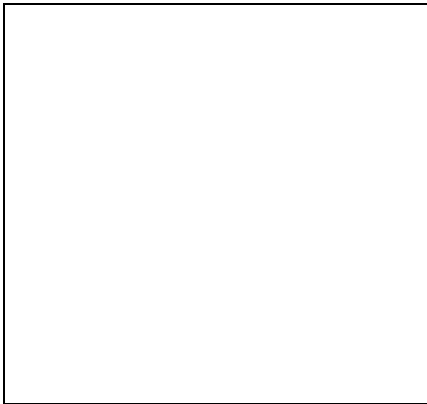
4. The first method is the most correct way of granting a user to gain access to files whose document record belongs to another group, other than one of the groups that he may currently belong to as listed in the TIMS logon account. Using the User Manager for Domains, add a new NT domain group to the user account (use a group that is already created in the TIMS database, otherwise add it in before continuing). Then run the TIMS Data Manager, locate the user logon name and blank out the list of groupnames that is listed for this user. Logon as the user with the updated groupname information and run the Project Navigator. Check that the TIMS software has updated the users groupname information in the User Privilege table. You have the option of manually adding this new groupname to the user's
-

list of groups, but you **MUST** be very careful that you use the correct syntax with single-quotes and comma delimiters...if unsure, let the system do it for you.

5. The next method is only possible if the underlying NTFS permissions for the files grant Everyone to have full access to the file, such as in a TIMS system that locks the users into Database View mode only, with no option to access files using the File List View. That being the case, you could simply edit the TIMS logon account name and manually add the groupname to the user's current list of groups, paying careful attention to the syntax of single-quotes and comma delimiters. By being locked in the Database View, the document record will solely determine the users access rights to edit this file, coupled with the fact that the underlying NTFS permissions grant the user with permission to change the file.
-

## Reference File Logicals

- When using TIMS do **NOT** use MicroStation's ability to store the full file path names for reference files.
- Using the TIMS preferences inside MicroStation set both:
  1. Resolve Reference Paths **ON** (click **OFF** if you want to skip this feature and save time during MicroStation loading of the design file, useful if you have many, many reference files and you do not want to spend time to see all references from other project directories, as this does take some time to process on slower PCs).
  2. Force Ref Logical Attachment **ON** if you often copy files from one project when starting up another project and the reference files will **NOT** be part of the new project. This ensures the files in the new project will continue to locate the reference files from the original source project directory (click **OFF** if you do not want this feature)



- When attaching reference files from another project use the Applications pull-down
  - Select TIMS Toolset->Attach Ref, and the Project Navigator will appear (remember to keep it minimized when not being used, to maintain the OLE connection between it and MicroStation).
  - Double-click to select the file to attach using Project Navigator (no need to Copy Out the file first, Project Navigator does this automatically if necessary)
  - Complete the normal MicroStation reference file attachment details.
-

## **TIMS Database Structure**

- The TIMS data is a relational database and has many tables that rely on other tables
  - The following is by no means complete in the structure, however it is explained so one can see the relationship between the TIMS Data Manager Forms.
-

## Repairing TIMSDATA (MS Access option only)

- The data is stored in the TIMSDATA.MDB file.
  - On occasion the information in this file can become corrupted and may need to be repaired and compacted (for MS Access 2000, compacting will also repair at the same time).
  - Open Microsoft Access™
    - 1 Close the database. If you are in a multi-user environment, confirm that all users have closed the database.
    - 2 Backup the TIMSDATA.MDB file for safety, e.g. copy to TIMSDATA.BAK.
    - 3 Start MS Access with no database open. On the Tools menu, point to Database Utilities, and then click Repair Database. Locate the TIMSDATA.MDB file and click on Repair. It should notify you that the repair was successful.
    - 4 Now select Tools->Database Utilities->Compact Database.
    - 5 In the Database To Compact From dialog box, locate TIMSDATA.MDB.
    - 6 In the Compact Database Into dialog box, specify a name, drive, and folder for the compacted database. You may specify TIMSDATA.MDB if you have already made a backup copy of the file.
-

## Duties of a TIMS Manager

Things you should know before starting this section:

- Node Name (TCP/IP hostname) of the File Server
- Node Name (TCP/IP hostname) of the Database Server
- Find, Edit, Add and Delete records in TIMS Data Manager

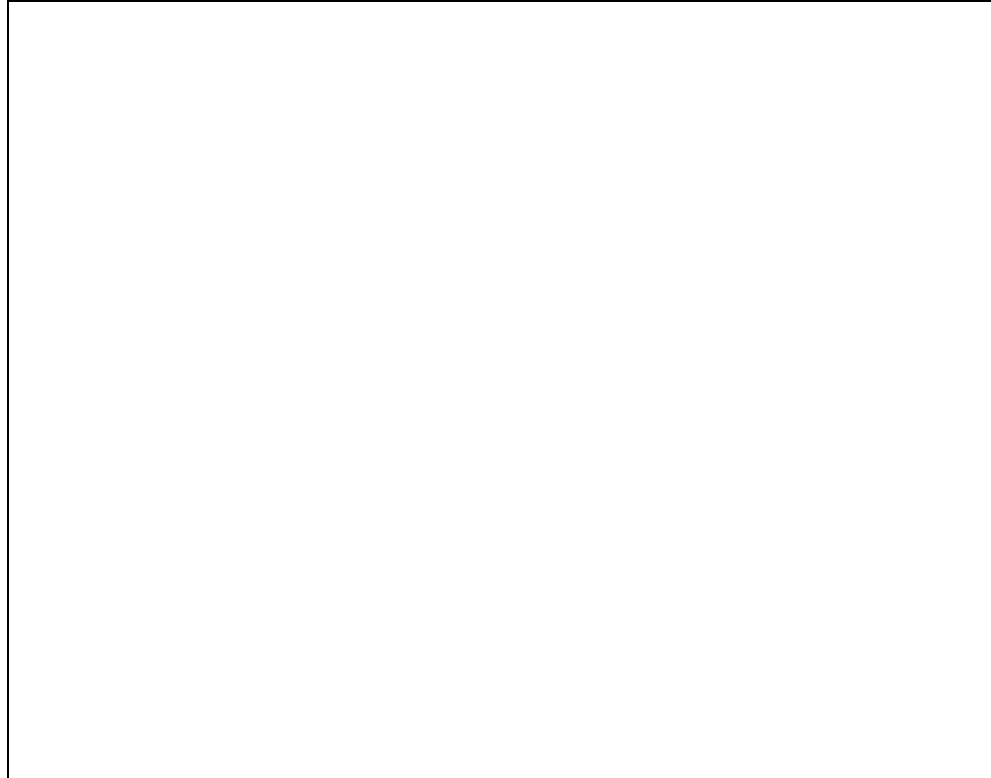
In this section you will be able to:

- Manage projects
    - Add project records and directories
    - Change project status
    - Move Project directories and associated files
  - Set TIMS Security
    - Modify database access rights
    - Set User Privilege Levels
  - Manage the Maintenance Tables (18)
    - manage lookup lists
    - create custom document fields
    - set the document type extensions
  - Check the file transfer logs
    - Archive file transfer history log
  - Troubleshoot file transfer problems
    - Modify the file transfer log and fix file attributes
-

## Manage projects

- The Project record controls the location of project directories and files. You may access the record attributes using either the TIMS Data Manager or the Project Navigator.
  - Directory pointers must be to a TIMS FILE SERVER (this must be known)
  - One can create sub-projects, which are a pointer to a sub-directory of a Project directory and is most easily visualized when using the Project Navigator.
  - Project directories and files can be move by editing the path of a project. The TIMS Data Manager will attempt to move the underlying directory if it is changed. The Project Navigator does NOT CURRENTLY move the directory, but it will modify the directory path value in the project record...use caution with the Project Navigator.
  - Only ACTIVE project files will be seen by TIMS users, or if the TIMS Manager turns on the User Setting in the Project Navigator to view All Projects.
  - Files in Projects with status other than ACTIVE will not be available for review or modify
-

Preferably, you will use the TIMS Data Manager to manage your project records, as it has all the triggers required to ensure that your modifications to the record attributes, such as the project path and underlying directory on the file server, are valid.



For quick System Manager access, the Project Navigator has also been ‘equipped’ to allow you to perform Project Record management. This is not the preferred tool to use, as it does not validate all inputs (e.g., the path will not be moved if it is changed).

**ROAD\_DESIGN - Properties**

Project |

**Project Definition**

Project Title: Detour Design of Intersections

Manager: T. J. Boyles

Leader:

Company: Giffels Associates Limited

Owner: administrator

Group/Dept: Domain users/General User

**Network Storage Location**

Node: crd7 Secure Project

Path: d:\Allfiles\highway\road\_design\

Replicable:  Archived:

**Reference Data**

Ref. No.: Charge No.:

Status: ACTIVE

Start Date: 1996-12-19 End Date:

Comments:

OK Cancel Apply

**Exercise:****➤ Creating a Project using the TIMS Data Manager:**

1. Click **CANCEL** for a blank record
2. Click on **INSERT**
3. In the *Name (ID)* field key in the new project name **C97001**
4. Leave the *Sub-Project* field blank
5. Fill in the *Description* field: *This is my name project creation*
6. Be the *manager* and select a *company* to do the work for
7. In the *Node* field key in the name of your **FILE SERVER**
8. Notice the *path* for the project files has been pre-assigned.
9. The *Status* is set to **ACTIVE** by default.
10. Key in a *Charge No.* for future accounting **N097101**
11. Fill in the *Ref Number* for Client referencing: **97-7896**
12. **SAVE** the project record.
13. Create a second project using Duplicate Record.
14. Name this project **C97002**
15. **SAVE**

**➤ Moving a Project:**

1. Find the record for **C97001** and select **EDIT**
2. Modify the path to: C:\TIMS\_Projects\c97001\
3. **SAVE**

**➤ Change Project Status**

1. In the *Projects* form execute a query for C97002
  2. Select **EDIT**
  3. Modify the *STATUS* to **ON-HOLD** and **SAVE**
-

➤ **Creating a Project using the Project Navigator:**

1. Log in as the Administrator
  2. Start the Project Navigator and click on the All Project Books icon in the left-side project tree view pane.
  3. To create a top level project, ensure the All Projects Books icon (or Last Access Projects Books icon) is selected and then you can either right-click or select Project->New to create a new project. To create a subproject, simply highlight the appropriate parent project first before selecting Project->New.
-

## TIMS Security

- There are two forms for setting security:
  - Access Rights:
  - User Privilege Levels
- Only those with TIMS Manager privilege have access to modify security levels
- These two forms can be accessed from the TIMS Data Manager Main Menu Security Menu button

## User Privilege Levels

- The following are the User Privilege Levels:
  1. TIMS Manager - has access to everything
  2. Operator/User - has access only to privileges set in the access rights table
  3. Reviewer
  4. None
- Users are by default set to the User/Operator Class
- To give a user TIMS Manager access they must be entered in the User Privilege Form and their User Class set to TIMS Manager
- Users can also be set to be Reviewers, ideal for those using documents but not editing them, such as project managers.
- To deny specific users from using TIMS, their primary group may be excluded from the TIMS3 group's table, or individual users may be set to a user class of None.
- The User Privilege form can either be used in a Datasheet mode or in Form mode. Toggle between the two modes using the Datasheet and Form View icons at the upper left are of the menu bar.

User Privilege Levels								
User Name:	User Class:	User Groups:	Enable Dr	Replace I	Update R	Add Docu	txtDragAn	
Administrator	TIMS Manager	'Domain Users'	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		-1
System	TIMS Manager	'Domain Users'	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		-1
▶ garyj	TIMS Manager	'dept_16','domain users'	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		-1
view_user	Reviewer	'electrical','domain users'	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
banned_user	None	'mechanical','domain users'	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
*			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Record: 3 of 5

**User Privilege Levels**

User Name: garyj

User Class: TIMS Manager

User Groups: 'dept\_16','domain users'

Record: 3 of 5

**Exercise:****➤ Changing user Access**

1. Log in as Administrator
  2. Open Security Menu...User Privilege Levels
  3. Locate your *username*. If it is not in the database add it as a new record
  4. Set the *Class* to **TIMS Manager**
  5. Select another *username* and set the *Class* to **Review**
  6. Exit this form using the window controls in the top right corner of the Forms window
  7. Logout
  8. Log in as the REVIEW User and try to Check Out a file
  9. Logout and log back in as yourself
  10. Create a new project under your username
-

## User Access Rights

- The TIMS Manager will always have all access rights to all documents
  - Sets **USER RIGHTS** to 7 forms in the Data Manager:
    - Document Set Entries
    - Document Sets
    - Document
    - Contact
    - Company
    - Project
    - Tools
  - There are 4 Access rights to be set for each form
    - Review: review records
    - Edit edit records
    - Insert create new records
    - Delete remove records
  - The access right levels are:
    - All: allows all users access
    - Group: only users that belong to the same group have access
    - Owner: only the owner has access
    - None: no users have access, only those with TIMS Manager privileges have access
  - This form is always in edit mode
-

The screenshot shows a window titled "Data Access Rights" with a green header bar. Below the header is a table with columns for "Review", "Edit", "Insert", and "Delete". The rows represent different "Tims Data Sets": "Tools", "Doc Revisions", "Document Sets", "Document", "Contact", "Company", and "Project". Each cell in the table contains a dropdown menu. The "Tools" row has "All" for Review, "Owner" for Edit, "None" for Insert, and "Owner" for Delete. All other rows have "All" in all four columns. At the bottom, there is a record navigation bar showing "Record: 1 of 7".

TIMS Data Sets	Review	Edit	Insert	Delete
Tools	All	Owner	None	Owner
Doc Revisions	All	All	All	All
Document Sets	All	All	All	All
Document	All	All	All	All
Contact	All	All	All	All
Company	All	All	All	All
Project	All	All	All	All

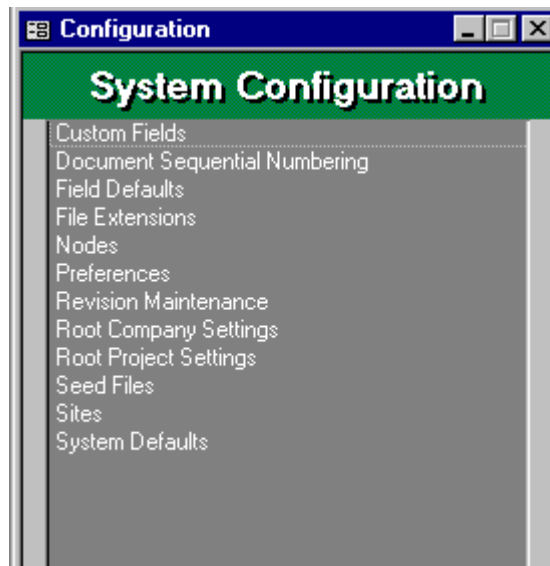
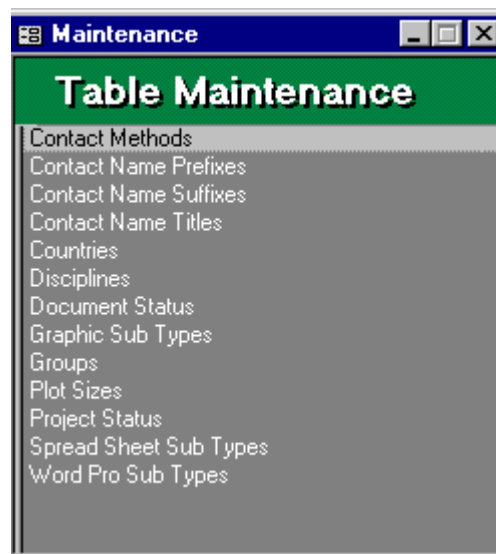
Record: 1 of 7

**Exercise:****➤ Changing Access Rights**

1. Open Security Menu...User Privilege Levels
  2. Change the *Document Set Entries* access **Edit** access to *Group*
  3. Change the access to **delete Projects** to *None*
  4. Change the access to **Insert and Edit Projects** to *None*
  5. Change *Document Edit*, **Insert** and **Delete** access to *Group*
  6. Set the *Document Sets Edit*, **Insert** and **Delete** access to *Owner*
-

## Manage the Maintenance Tables and System Configuration

- There are 25 tables to be maintained in the TIMS Data Manager, 13 from the Table Maintenance option and 12 more from the System Configuration option
- Only those with TIMS Manager privileges have access to these tables
- Most items in the tables appear as **drop down** choices in other forms
- The Custom documents table items appear as field labels on the Document Detailed Definition Form on the Customs Tab



**Exercise:****➤ Adding plot sizes to the lookup table:**

1. Open the Maintenance table
2. Select Plot Sizes
3. In the next available blank field key in the Plot Size E
4. In the size field key in 36" x 24"
5. Close the form
6. Open the Document Details Form and Select the Details Tab
7. Select the drop down arrow for Plot Size
8. Plot Size E should now be added to the list

**➤ Adding document sub types and file extensions:**

1. Open the Maintenance table
2. Select graphic sub type
3. In the first field in the next blank record key in MsPP
4. In the next blank field key in PowerPoint Presentations
5. Close the graphic sub type form
6. Open the File extensions table
7. In the first field in the next blank record, select the down arrow and select the file type MsPP
8. Set the file extension to PPT.

**➤ Linking NT groups to a discipline in TIMS:**

1. Open the Maintenance table
  2. Select Disciplines
  3. Add a RoadDesign discipline
  4. Exit the table
  5. Select Groups
  6. Key in a valid NT Group. (See Systems Administration for adding NT Groups)
  7. Label the group.
-

➤ **Creating Custom Fields:**

1. Open the Maintenance table
  2. Select Custom Fields
  3. Select the GRAPHICDOCS subtype at the top pull down list
  4. In the first text field key in Major\_Road
  5. In the second field key in Starting\_Intersection
  6. In the third field key in Ending\_Intersection
  7. In the first numeric field key in Northing\_Start
  8. In the second numeric field key in Easting\_Start
  9. In the first numeric field key in Northing\_End
  10. In the second numeric field key in Easting\_End
  11. Close the custom fields
  12. Open the Detailed Documents form and select the Custom Tab to review the custom fields.
  13. Start the Project Navigator and select a Graphic document, select the properties option and you can review the custom fields tab.
-

## Managing the File Transfer Logs

- The file transfer log should be checked regularly for any files that have not been properly transferred
- To correct a problem that has occurred during file transfer there are three items that need to be addressed:
  1. The location of the most up to date file
  2. The files attributes need to match those in the file transfer log:
  3. The status of the file in the file transfer log

Status:	Client Attributes:	Server Attributes
MOD (check out)	read/write (RW)	read
REV (copy out)	read (R-)	depends on ownership

## Trouble Shooting

- The key here is to match the attributes with the file transfer status.
    1. Locate the latest version of the file
      - If it is on the server then delete the client file
      - There may be a copy of the file on the server named: **filename~.ext**, this may be the latest copy, if so rename it, otherwise delete it.
    2. Reset the file attributes
      - If the latest file is on the client, then change the file attributes to match the check out mode in the **FILE TRANSFER LOG** and transfer the file
      - If a file is copied out and cannot be remove, change the attributes to read only and try transferring it once again
    3. If the file is missing on the local machine, or the client has been destroyed then remove the record from the file transfer log and reset the attributes on the server file.
-

- Periodically, depending on the volume of records created, the **FILE TRANSFER HISTORY LOG** needs to be Archived. This table records all file transactions related to the files controlled under TIMS including: creation, check out/in and deletions. Open the form and locate all or a selection of records. Select Archive and click on the period to archive.

The screenshot shows a Windows-style dialog box titled "Period to Archive". The dialog has a blue title bar with the text "Period to Archive" and a close button (X). Below the title bar is a green header with the text "Period To Archive" in white. The main area of the dialog is light gray and contains the following elements:

- "From:" and "To:" labels followed by date picker controls.
- A checked checkbox labeled "Copy data to text file:".
- A text input field for a file path, followed by a "Browse" button.
- A blue-bordered box containing the text: "Please select date range that you would like to use to archive the Transfer records."
- Two buttons at the bottom: "Archive Period" and "Cancel".

**Exercise:****➤ Checking the file transfer log**

1. In TIMS Data Manager select File Transfer
2. Open the File Checkout Log
3. Sort the Data to locate the records that are non-permanent and are older than today

**➤ Fixing a document with a missing local file**

1. To create the scenario, Check Out a file
2. Using the NT Window Explorer remove the file from the local system
3. Try checking the file in through Project Navigator

**To Fix: Option 1**

1. Change the file privileges on the file server to read/write
2. Remove the file transfer record from the File Transfer Log Table

**To Fix: Option 2**

1. Copy a dummy file into the local project directory and name it the missing filename. Ensure the file has read/write privileges.
  2. In Project Navigator select the file and right click selecting “Cancel Check Out”
-

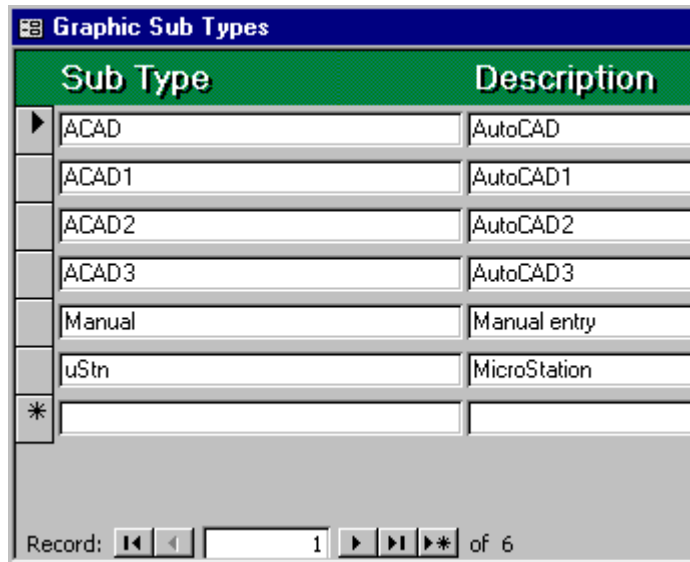
## Review Topics

- Define the difference between a list of files in directories on the server versus the project and document listing that you see in PNAV Database view.
  - Define the physics of what happens when you actually check-out a file: verifies in db that file is not already checked out, sends a request to the XFER file server to copy the file from server to client PC, file on client is RW, file on server is switched to R-Only, entry in XFER Checkout table (tblXfers) is created to mark file as being checked out for MOD.
  - Define where files are copied to on local PC (FT\_FSYS)
  - Define what double-clicking does. Check-Out the file as above, but use the default location reference files, and check them out as well. This behavior can be modified in two ways:
    1. User Settings->Do Not Update References on File Open – by default this setting is turned OFF, so reference files WILL automatically get copied out when the master file is double-clicked in PNAV. As the TIMS Manager only, you can turn this ON or OFF using the TDM, Security->User Privilege Level, locate the user(s), change the Update References on File Open toggle option.
    2. User Settings->Checkout References – this is a setting that only the user can set and it is saved in the TIMS3 Current User registry section. It controls whether reference files are Checked-out or Copied-out by default during double-click. User may override on the fly if a right-click Check-out ->With References is done instead of double-clicking.
  - Run DBSync to find orphaned records, and / or missing files (report only)
-

- Run DBSync to bulk load data into the TIMS system, for e.g., from a CD.  
Must copy files for one group to the server directory and then DBSync with a user/group, and then copy the next set of files for another group to the server directory and select the next user/group during bulk loading. Otherwise, you have to use DnD with PNAV and log on as each user/group to set the files' ownerships automatically based on the current logon. Or, if NTFS does not matter, bulk load them all in, using a special description/title, and then globally change the docs using TDM or DirectAccess.mdb global linkages.
  - Use TIMS Data Manager to generate reports
  - Use the reporting wizard to generate adhoc reports
  - Use TIMS Data Manager to make global changes to document properties by going to Datasheet View. Show reporting option in Datasheet View.
  - Use TDM to move projects from one directory/drive/server to another.
  - Run cleanup interactively
  - Set up MS Access to query/control the TIMS3 data directly
  - Show how to set up the TIMS3 security model, and what the settings mean
  - Showing how to setup NTFS permissions on the file server for TIMS3 data as per our security model, i.e. Set the top level directory to System:F, Admins:F, Everyone or Domain Users:R for a typical group access model.
  - How to use the RefUtil program to generate reference file listing reports, modify attachment names, building input files for an entire directory tree, etc
  - Use PNAV to MOVE projects from one branch to another
  - Use PNAV to COPY+PASTE a directory branch, with docs, document sets, subprojects (e.g. template project trees)
  - Create a project tree and use it as a template to create new projects, with and without documents.
  - Show revisions maintenance form in PNAV (TDM is not good at this)
  - Show revisions sequencing IDs, with column to select which is to be used
-

- Show what automatic revision locking is (how it will lock file when received, and when it is checked out or 'unlocked' it will automatically bump up the rev number to the next one on the list.
  - Show how to lock all documents in a folder, to prevent people from checking them out. Currently, you must use TDM (datasheet view) or AccessDirect.mdb to locate all the documents using the ProjectID and then CTRL-H to do a Global Search and Replace to set the Locked field. Alternatively, there is a SQL script that can be used to lock all documents in an entire, specified project tree. Future version will have an option in PNAV to do this upon locking of a Project Record. Once a doc record has been locked, a non-TIMS Manager user will see the Doc Properties in PNAV as dimmed but checked ON. And if he tries to check it out, PNAV will ask if he would like to unlock it to start a new revision, but it will fail to unlock it if the user is a non-TIMS Manager (note: even though the Doc Revision Create access is set to say ALL, a non-TIMS Manager cannot unlock the file to create a new revision).
  - Define where MS\_SEEDFILES is set and used on file servers
-

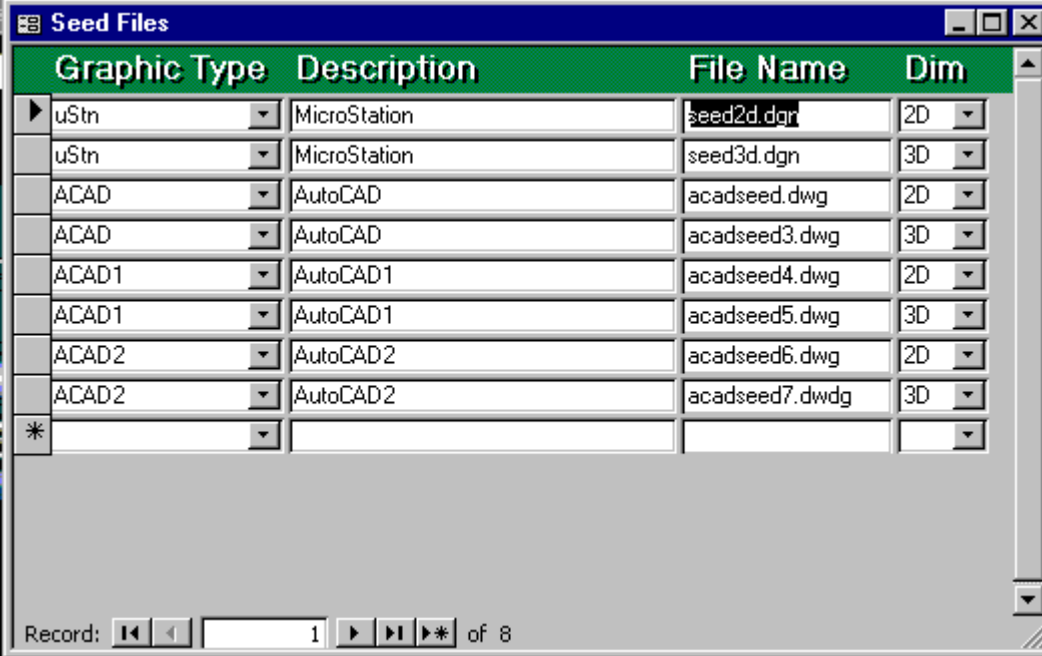
- Use TDM to add to the seedfiles option pull down list:  
Select Administration->Table Maintenance->Graphic Sub Types, and then add in more entries for dummy ACAD types, such as ACAD1, ACAD2, ACAD3, etc.



Graphic Sub Types	
Sub Type	Description
ACAD	AutoCAD
ACAD1	AutoCAD1
ACAD2	AutoCAD2
ACAD3	AutoCAD3
Manual	Manual entry
uStn	MicroStation
*	

Record: 1 of 6

- Next select Administration->System Configuration->Seed Files and add entries for seedfiles for these new graphic sub types. You may add up to two more seedfiles for each graphic sub type, one for 2D and one for 3D. In the case of AutoCAD, there is no such distinction, but for other CAD s/w such as MicroStation, this distinction does exist. The unique fields in this table are the first column, Graphic Type and the fourth column, Dim...so for e.g., you can specify a seedfile for Graphic Type ACAD1 and Dim 2D, and then another seedfile for Graphic Type ACAD1 and Dim 3D.



Graphic Type	Description	File Name	Dim
uStn	MicroStation	seed2d.dgn	2D
uStn	MicroStation	seed3d.dgn	3D
ACAD	AutoCAD	acadseed.dwg	2D
ACAD	AutoCAD	acadseed3.dwg	3D
ACAD1	AutoCAD1	acadseed4.dwg	2D
ACAD1	AutoCAD1	acadseed5.dwg	3D
ACAD2	AutoCAD2	acadseed6.dwg	2D
ACAD2	AutoCAD2	acadseed7.dwg	3D
*			

Record: 1 of 8