

Chalkline Tech Support Bulletin - Private Projects in VisiSpecs

Corporate Projects have their own set of Corporate Project Groups, Corporate Masters and Projects, Corporate Master Search Paths, and Corporate Design Guide Templates (DGTs).

Some projects may require that only a handful of users be able to access the project while the rest of the users cannot. Private Projects in VisiSpecs are only able to be accessed by certain users who are given the permissions to access them. The private functionality of VisiSpecs is essentially a different environment meaning that you cannot insert documents from your corporate masters, use corporate DGTs, or see the same project/group list structure as your corporate projects.

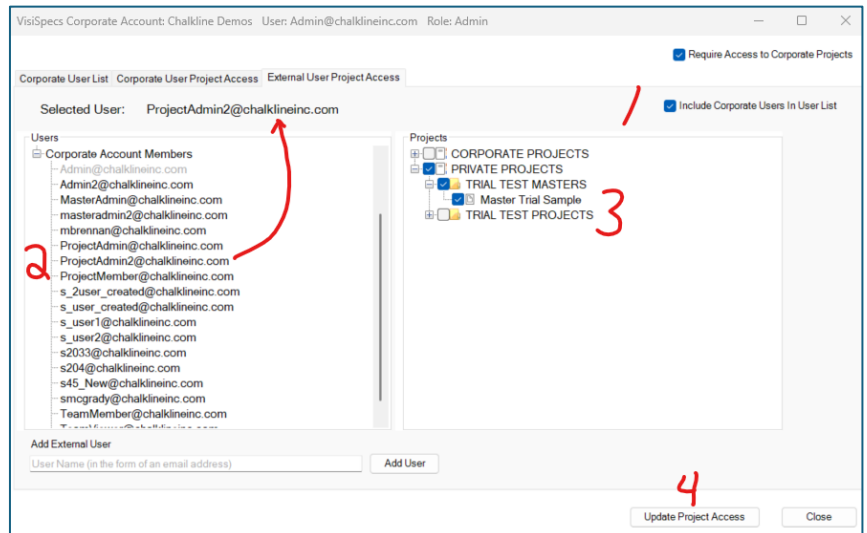
Create a Private Group, Private Project, and setup the required DGTs, Masters, and search paths for your team to use. This also means that any updates to your corporate master will not automatically be copied to your private master. The following steps will help create and/or update a private master if you already have your Master/DGTs set up in the shared corporate side of VisiSpecs.

Access Rights of Private Projects and Masters

1. No other user role (even Admin) may access private projects unless Shared with that user.
2. Only Admin or MasterAdmin users may share Private Projects with other Corporate or External Users.
3. Shared Private Projects have EDIT DOCS access rights or LOCKED for the shared users.

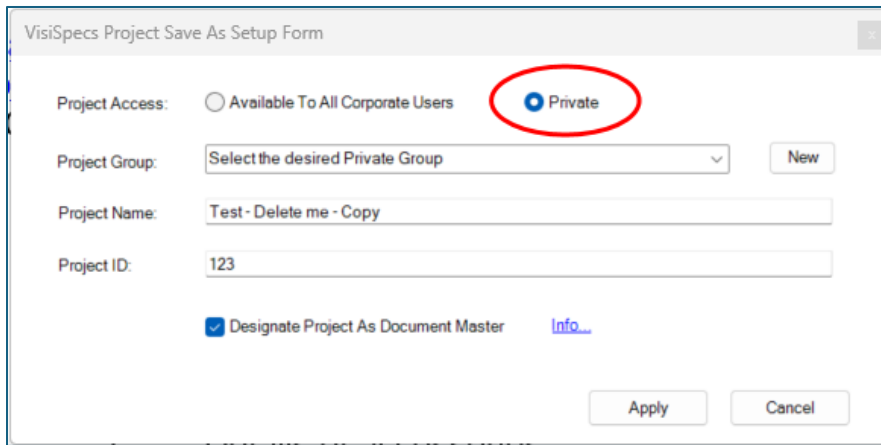
Creating and Adding Users to a Private Project:

1. Click Open Project > New Project
2. Select “Private” radio button in project settings
3. Fill out the other fields in the project settings and please refer to the additional information below if your private VisiSpecs environment does not yet have Masters, DGTs, or Search Paths set up.
4. Select the Administration button under Logout in the VisiSpecs ribbon menu and then click “Manage User Access”
 - 1) Include the Corporate Users in the List (one at a time)
 - 2) Select the User to give access to the project
 - 3) Select the Project(s) to give access
 - 4) Click Update Project Access



Copy your Corporate Master to a Private Master as follows:

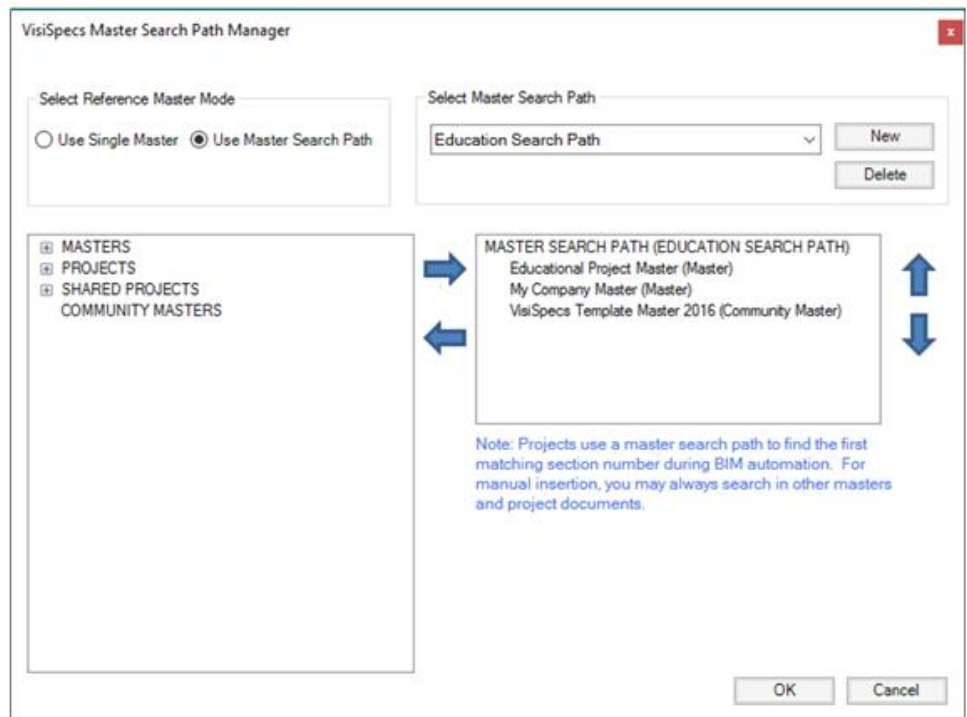
1. Open the corporate Master you wish to copy to a private master and select Open Project > Save Project As.
2. In the pop-up dialog, change Project Setting type from Corporate to Private.



3. Assign to a Private Project Group or create a new one if you don't already have one.

Creating a Master Search Path for your Private Project

1. Open the private project
2. Open project settings and click the "Select" button to open the Search Path
3. Select the desired order of your search path from the masters (and projects) in the private VisiSpecs environment.
 - a. You will have to have private masters already setup to accomplish this search path selection
 - b. This enables users to not only open your private projects but also insert sections from the private masters and projects in the project's search path.



Copying a Corporate DGTs to Private DGT is done as follows:

1. Open the Corporate DGT and do a Word File > Save As to save a local file.
2. Open the Private Project and Design Manager Design Guide Templates
3. Click Import to create your Private DGT from the file.