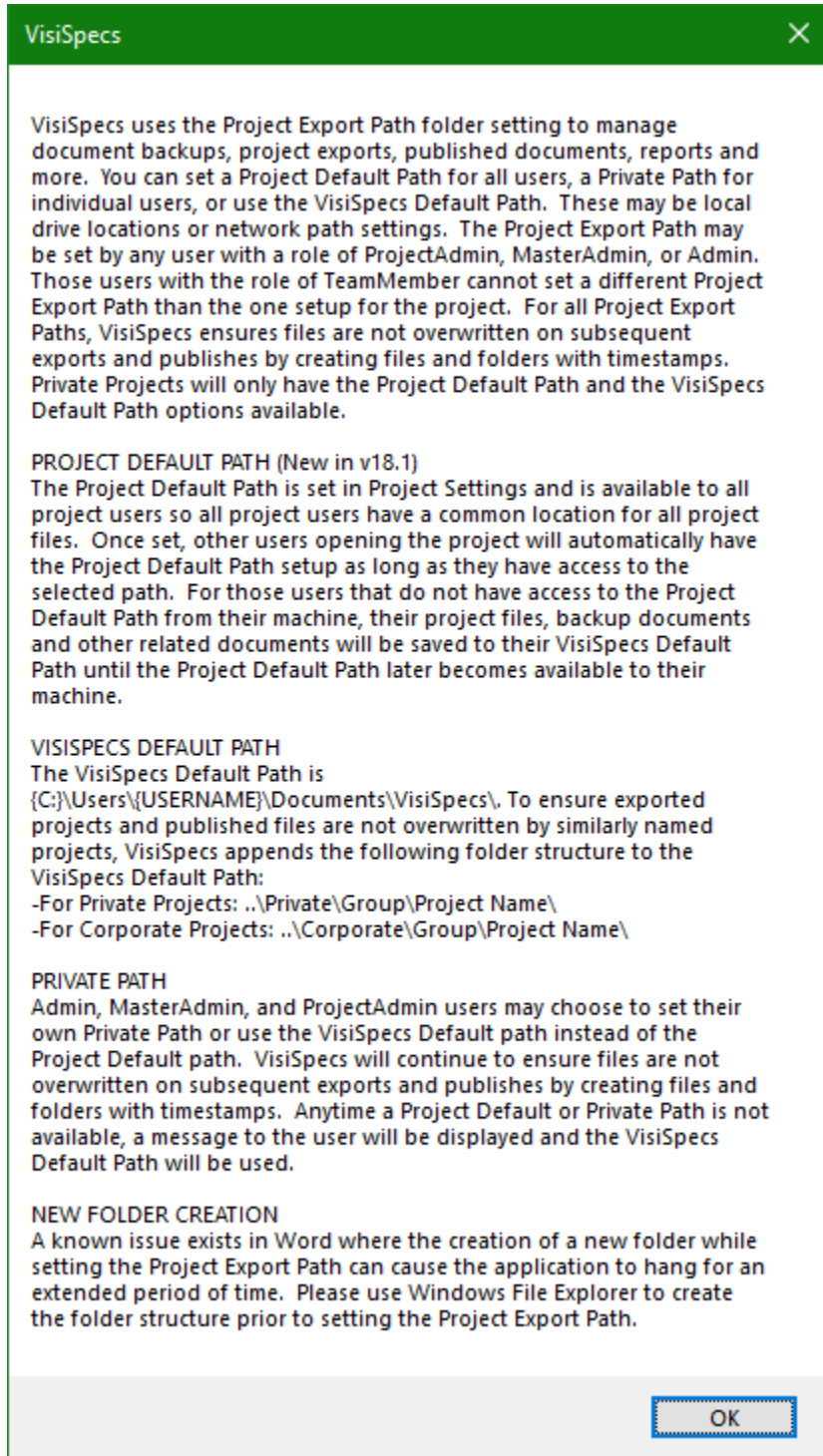**Chalkline Tech Support Bulletin - VisiSpecs Project Export Path and the Backups Folder**

The Project Settings Project Export Path (PEP) determines where VisiSpecs processes will save local files such as Backups, Reports, Published Files, and more. With multiple users working on a project and the ability for each user to point to a separate PEP, users may wonder why not all project files are in their backup folder or how to ensure they are all saved together.

Opening the Project Settings and clicking the Info… link under the Project Export Path gives a detailed explanation:

VisiSpecs   ✕

VisiSpecs uses the Project Export Path folder setting to manage
document backups, project exports, published documents, reports and
more. You can set a Project Default Path for all users, a Private Path for
individual users, or use the VisiSpecs Default Path. These may be local
drive locations or network path settings. The Project Export Path may
be set by any user with a role of ProjectAdmin, MasterAdmin, or Admin.
Those users with the role of TeamMember cannot set a different Project
Export Path than the one setup for the project. For all Project Export
Paths, VisiSpecs ensures files are not overwritten on subsequent
exports and publishes by creating files and folders with timestamps.
Private Projects will only have the Project Default Path and the VisiSpecs
Default Path options available.

PROJECT DEFAULT PATH (New in v18.1)
The Project Default Path is set in Project Settings and is available to all
project users so all project users have a common location for all project
files. Once set, other users opening the project will automatically have
the Project Default Path setup as long as they have access to the
selected path. For those users that do not have access to the Project
Default Path from their machine, their project files, backup documents
and other related documents will be saved to their VisiSpecs Default
Path until the Project Default Path later becomes available to their
machine.

VISISPECS DEFAULT PATH
The VisiSpecs Default Path is
{C:}\Users\{USERNAME}\Documents\VisiSpecs\. To ensure exported
projects and published files are not overwritten by similarly named
projects, VisiSpecs appends the following folder structure to the
VisiSpecs Default Path:
-For Private Projects: ..\Private\Group\Project Name\
-For Corporate Projects: ..\Corporate\Group\Project Name\

PRIVATE PATH
Admin, MasterAdmin, and ProjectAdmin users may choose to set their
own Private Path or use the VisiSpecs Default path instead of the
Project Default path. VisiSpecs will continue to ensure files are not
overwritten on subsequent exports and publishes by creating files and
folders with timestamps. Anytime a Project Default or Private Path is not
available, a message to the user will be displayed and the VisiSpecs
Default Path will be used.

NEW FOLDER CREATION
A known issue exists in Word where the creation of a new folder while
setting the Project Export Path can cause the application to hang for an
extended period of time. Please use Windows File Explorer to create
the folder structure prior to setting the Project Export Path.

OK

Local File Backups

1. Project Settings includes a pointer to the PEP

VisiSpecs Project Settings

Project Settings | Project Information | Project Owner | Project Team | Custom Fields | Version Information

Project

* Project Access: ◉ Available To All Corporate Users   ○ Private

* Project Group: TEST PROJECTS   [New]

* Project Name: Test PEP to OneDrive

* Project ID: 123456789

* Project Export Path: ◉ Project Default   ○ VisiSpecs Default   ○ Private Path   [Open]

Info..   %userprofile%\onedrive - chalkline inc\shared with everyone\projects\123456789   [Select]

Project Settings

Project Format: MasterFormat

Reference Master: Select a master from the list.   [Select]

Design Guide Template: BUILTIN1 - Single Page Header-Footer

Auto Formatting: ☑ Auto Apply Header Footer   ☐ Auto Apply Styles   ☐ Auto Apply Page Layout

Document Number Format: ◉ Ignore   ○ XXXXXX   ○ XX XXXX   ○ XX XX XX

Units of Measure: ◉ Ignore   ○ inch/pounds   ○ metric   ○ both   Set Options

Project Type: ☐ Designate Project As Document Master   Info...

[OK]   [Cancel]

     a. A user can set the Project Default Path to a folder all users have access to (i.e. Z:\Projects\202001\ or a OneDrive folder such as above or a BIM 360 local folder). Other users do not need to change the path since someone already set the Project Default. This folder may also be one that the IT department automatically backs up as part of their server backup routines.

         i. The Windows environment variable %USERPROFILE% may be used as a Project Default PEP which gets replaced with each local users %USERPROFILE% path. This facilitates PEP pointing to BIM360, DropBox, OneDrive and other cloud storage sites for multiple users.

     b. If a Project Default Path is not set **or upon opening the project the Project Default Path is not accessible (i.e. user working at another location or at home without access to the Z:\ folder)**, the VisiSpecs Default Path is used for the PEP which is a c:\users\{local user}\... path. A message pops up letting the user know the PEP path is not available and therefore the VisiSpecs Default Path will be used until the user reopens the project and the PEP path is available. If there are multiple users working on a project the backups will be saved based on the last user who saved the docs and what folder was available as the PEP.

     c. A Private Path may also be setup as the PEP. This is convenient when a user wants to create backup files in a separate private folder from where everyone else may be working.

Batch Update and Backups

At milestones such as 70% CD or 100% CD, you may wish to ensure that all the project files have been placed in the Backups folder. A user may backup files using the Publication Group > Batch Update Project Documents tool. This process will update all the Word files and automatic apply the Headers/Footers, Styles, Page Layout based on the project settings. The Batch Update saves the updated files not only to the VisiSpecs Cloud Server, but also saves a local copy of the backup files to the current PEP. This is a good option when a firm wants to ensure all current versions of the project documents are saved to a folder or for future File Explorer searches within all project specs such as a manufacturer or product name.

Some customers may want to more or delete the \PEP\Backups\ folder prior to running a batch update in case some of the files were added and deleted while a user did not have access to the PEP which means the files were not moved to the \PEP\Backups\Deleted Files\ folder and still remain in the \Backups folder.

Project Export (this is not the Publish function)

The menu option Open Project > Export Project… creates a folder structure like the Project Tree in the PEP and places all the project documents as they were LAST SAVED (Export Project **does not** do an auto update of H/F, Styles, or Page Layout, etc. like Batch update does). Do not get this confused with Publish which creates a Project Manual or saves Project Documents for submission removing hidden text, strikeouts, and applying H/F and other publish functions.

Searching all Project Files

VisiSpecs can search all your VisiSpecs project document names in the Insert Spec dialog. If you want to search within the content of the specs, using File Explorer to search all your Project Backups is a good option. If you are using OneDrive in your PEP and keeping the files online until opened which saves disk space, you will need to do the search on the web version of OneDrive. Tip: Use an asterisk to search such as waterproof*.