

Chalkline Tech Support Bulletin - Managing Company Masters and Backups

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.

As Masters and Projects are created, users should know where project docs are saved as backups. Local file backup can occur on individual PCs, Server locations, or other windows paths. As VisiSpecs masters may contain automated filter links users should make a backup copy on the VisiSpecs Cloud Server periodically.

Local File Backups

1. Each project has in Project Settings a Project Export Path (PEP)
 - a. A user can set the PEP for all users so that all the backup files will be stored in the same location which IT also backs up as part of their server backup routines. (i.e. z:\specs\project 010203\)
 - b. If a Project Default Path is not set or not accessible, the VisiSpecs Default Path is used for the PEP which is a c:\users\{local user}\... path. For a single user all the files are in one folder, but if there are multiple users working on a project the backups will be saved based on the last user who saved the docs.
 - c. A Private Path may also be setup as the PEP. This is convenient when other users are using one of the above PEP folders, but a user wants to create backup files in another private folder.
2. Batch Update and Backups
 - a. A user may open a project to update all the docs and create backup files using the Publication Group > Batch Update Project Documents function. This process will update all the Word files with the Automatic application of the Headers/Footers, Styles, Page Layout based on the project settings to the project in the cloud server. The process also saves a local copy of the backup files to the PEP.
3. Project Export
 - a. 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 update of H/F, Styles, etc. like Batch update).

Master Backups

1. For Masters, you may wish to periodically create a copy of your company master(s) in its entirety to another Project Group (i.e. a Project Group called ARCHIVED). If someone accidentally deletes or incorrectly edits the master you can then quickly replace it or Admins may now "undelete" a project. Opening the ARCHIVED master and then Open Project > Save Project As... allows you to quickly recreate the master to its proper state. The ARCHIVED group is great for old project archiving as well – just change the Project Settings > Project Group.

Masters Under Development

1. Master administrators should have a FIRM MASTER available for project use which is separate from the master being revised and updated but not yet ready for company project use.
 - a. A separate VisiSpecs project group called NOT FOR PROJECT USE – Firm Master may be created.
 - b. When docs are approved and ready to be placed in the FIRM MASTER for project use, open the FIRM MASTER, delete the old docs, and insert the updated docs from the master under development.
 - i. You may then want to Backup your new Master as above.

Sample Group and Master/Project Listing

CORPORATE MASTERS

MASTERS

FIRM MASTER

COMMERCIAL MASTER (ie. MS Q219 FL or NMSQ119)

ARCHIVED

OLD <date> FIRM MASTER

OLD <date> PROJECTS

UNDER DEVELOPMENT

NOT FOR PROJECT USE - FIRM MASTER

CORPORATE PROJECTS

TEST PROJECTS

Your Initials_Test Project

2021 PROJECTS

Project in Design

<or other Preferred Group Naming Convention>