

## Using Privia Pure Web to View, Edit and Comment on Files

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## Introduction

One of the advantages of using Privia is that it has an installable client that manages caching documents that are being viewed or edited. This caching mechanism allows one click checkout/editing and one click check-in/upload without worrying about where the document is stored on the client computer. For users that are unable to install a Windows based application, Privia has a Web client that looks identical to the Enhanced Web client but does not have the caching mechanism. As a result, when using the Web client (referred to as Pure Web) the end user must manage where the documents are stored during editing.

This document is intended to provide a guide on the best practices for using the Privia Pure Web client.

## Caching

The significant difference between the Enhanced Web client and the Pure Web client is the integration of the installed client to manage the document cache. Integration of the installed client with the browser is what enables one click lock/unlock for end users.

When using Enhanced Web, any document that is viewed or edited is automatically stored in a protected cache on the client computer. In this mode of operation, the user only needs to perform a gesture in the client and the document will be managed with that one click.

Feature			Platform Client	Enhanced Web	Pure Web
Integration with Microsoft Applications			✓	✓	
Commenting Tool			✓	✓	
Drag/Drop from Desktop	✓				
Integration with Desktop			✓	✓	
Offline viewing/editing of documents			✓		
Workflow launching and timeline adjust				✓	✓
Reporting				✓	✓
Opportunity data visibility				✓	✓
Account Management				✓	✓
Past Performance Management				✓	✓
Opportunity Scoring Matrix				✓	✓

Like all browser based document management systems, when using the Pure Web client, the location that the document is stored must be specified by the end user. This causes a user to have to click a few times to get the document to the right location. This also opens up a potential problem in that browsers present the user with a dialog when opening a document that lets them “Open”, “Save” or “Cancel”. The potential problem is that if the user clicks “Open” the document will be stored in the browser’s cache. As a result, any changes to documents that are opened in the browser cache will be lost when the browser is closed.

## How to Tell if Pure Web Should Be Used

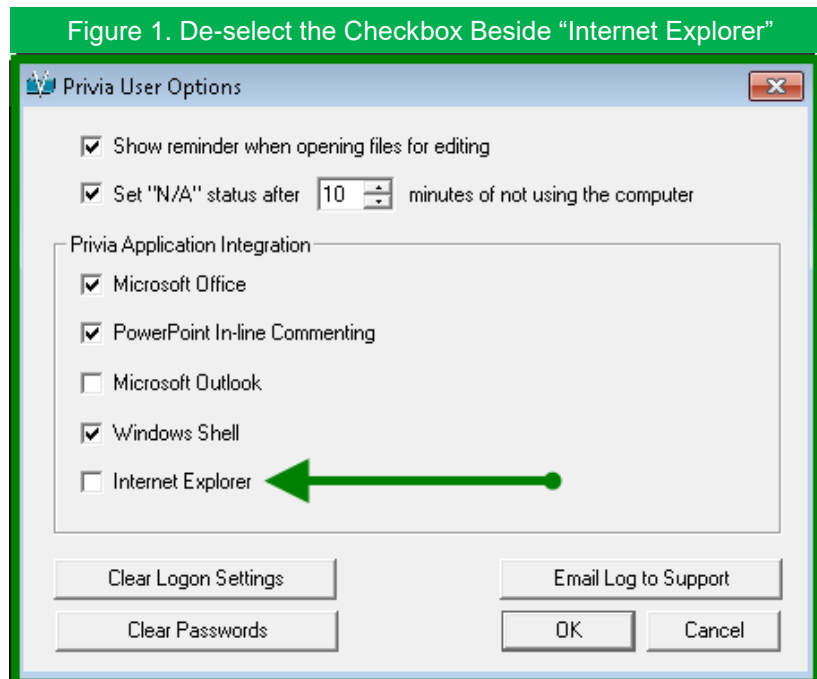
When accessing Privia from a Web browser, the browser may operate in two modes. Pure Web, is the mode that is used if the Privia Platform client is not installed, Internet Explorer integration option is disabled in Privia User Option, or when using Safari or Firefox. It must be noted that since Enhanced Web relies on ActiveX controls, Enhanced web is **only** available in the Internet Explorer browser.

## Using Pure Web

When the Privia Platform client is installed and the user is connected with Internet Explorer 9, 10, or 11, a Privia icon will appear in the taskbar. If the Privia icon is not present, then the browser is loading the Privia Pure Web client. If the Privia icon is not present, it may be disabled through the Privia User Options or a setting on the computer is blocking the use of ActiveX in Internet Explorer.

To disable Internet Explorer integration:

1. Click the Windows Start Menu
2. Click "All Programs"
3. Select the "Privia" folder
4. Click "Privia User Options"
5. Uncheck the last box that is labeled "Internet Explorer"
6. Click "OK"
7. Exit Internet Explorer
8. Start the Privia Web client



If the checkbox for Internet Explorer is checked but the Privia icon does not appear in the taskbar, the computer is not configured to allow ActiveX controls to run in the browser.

## Best Practice: Viewing a Document

When viewing a document, it does not matter if the document is stored in the browser cache or in a user specified location. But it is best to create a habit of avoiding the “Open” button when viewing a document to be consistent with the proper method for editing a document. However, if still wishing to view the document, then follow these steps to view a document in Privia Pure Web:

1. Right-click on the document in Privia
2. Choose the menu option for “View”
3. A dialog will open with two radio buttons: “Open” or “Save”
4. Choose the radio button for “Open” or “Save File” (shown in Figure 2)
5. Select a location on the local computer to save the document
6. Go to that location and open the document on the computer

Figure 2. Right-click on the Document to View

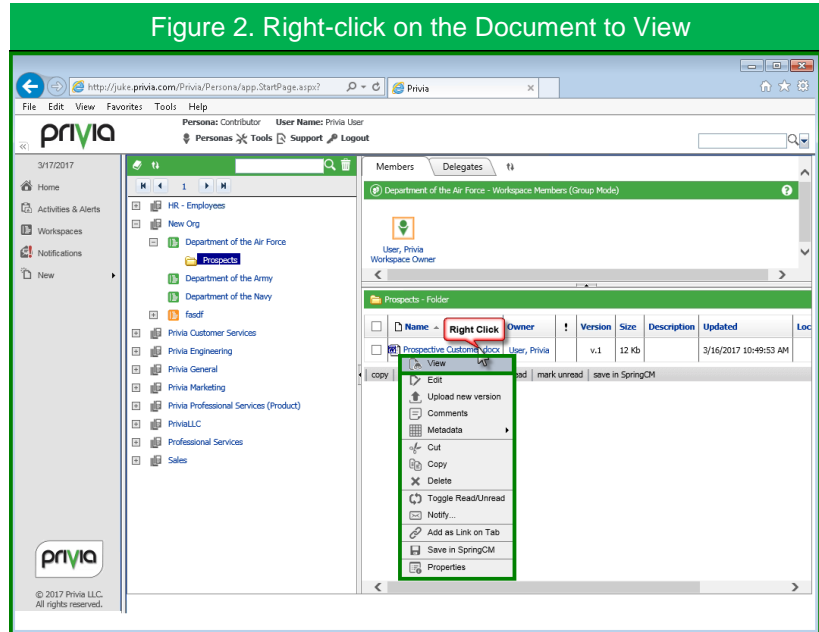
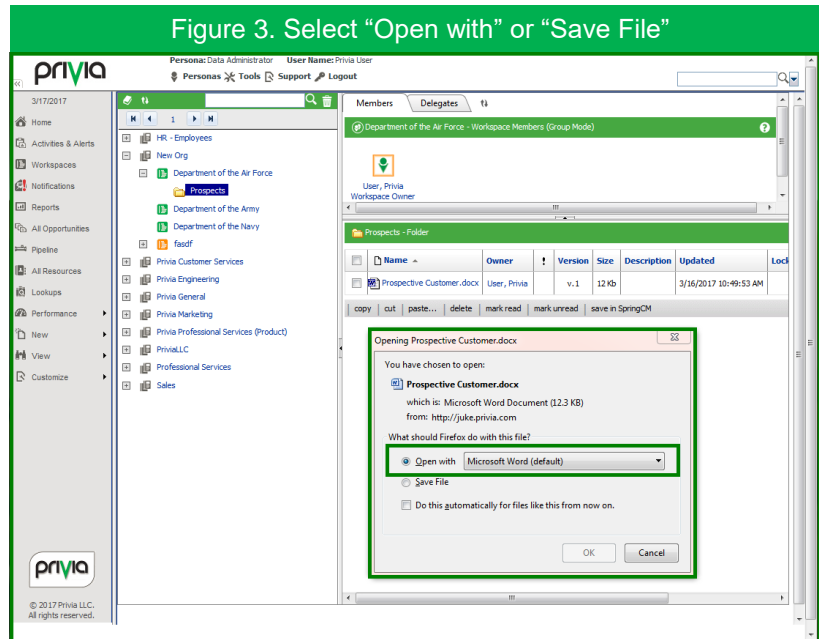


Figure 3. Select “Open with” or “Save File”



## Best Practice: Editing a Document in Pure Web

When editing a document, **the document MUST be saved to a location on the local computer** so that the document is not only stored in the browser cache (this will help alleviate confusion down the line)

Follow these steps to edit a document in Privia Pure Web:

1. Right-click on the document in Privia
2. Choose the menu option “Edit”
3. A dialog will open with three buttons: “Open”, “Save”, or “Cancel”
4. Choose the radio button for “Save”
5. Select a location on the local computer to save the document

6. Go to that location and open the document on the computer

**Important: Please make sure that when the document is checked out for editing, saves are being made to the document regularly. It is best practice to save an additional time before checking the document back in to upload the latest version**

Follow these steps to check in a document after making edits:

1. Right-click on the document in Privia that was saved to the local system (now has a red lock icon next to it)
2. Choose the menu option “Unlock”

Figure 4. Right-click on the Document to Edit

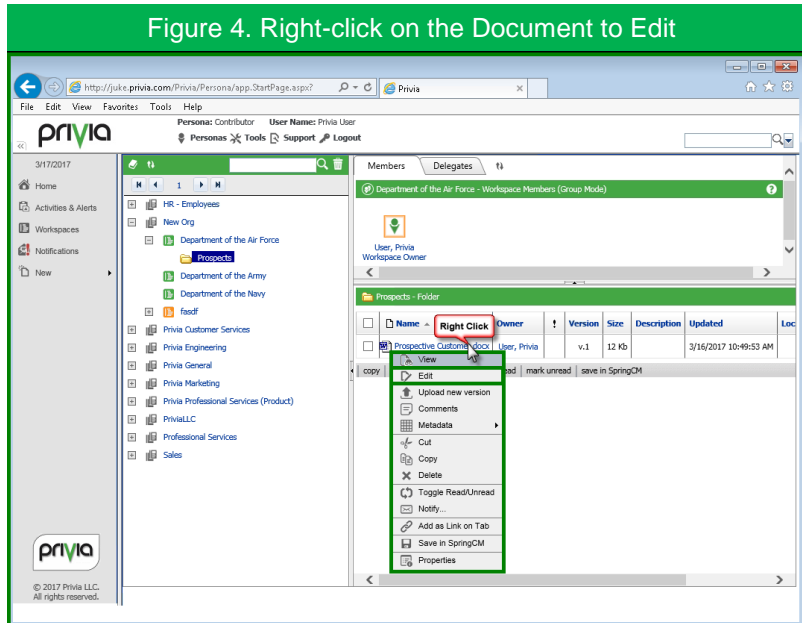
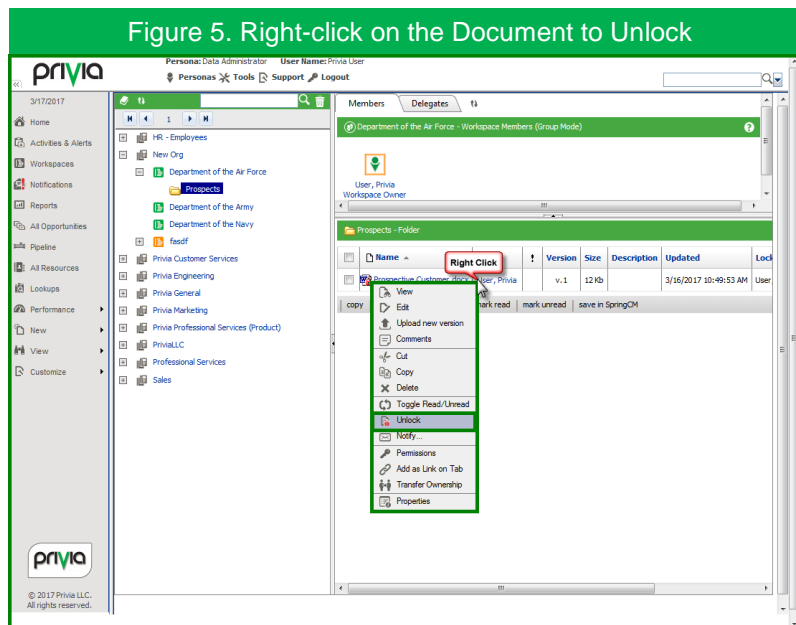


Figure 5. Right-click on the Document to Unlock



3. In the resulting dialog, select the radio button beside “Upload editing results...”

4. Select the radio button beside “Upload new file”

5. Click the “Browse” button

6. Navigate to the location where the file was initially saved to the system and click “Open”

7. The filename should now display next to the “Browse” button, click “Ok”

The upload will process and when finished, the version number of the document will increase and there will be a timestamp that indicates when the file was uploaded.

Figure 6. Upload as a New Version

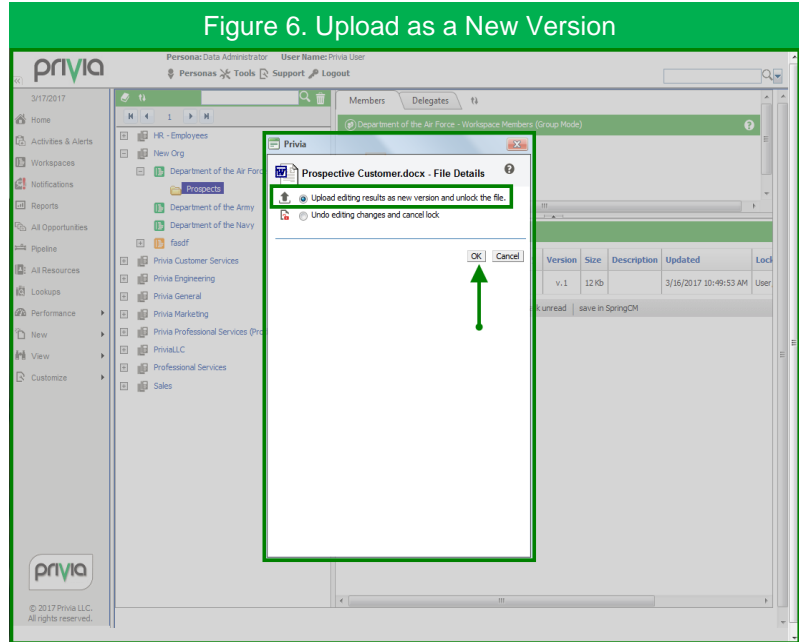
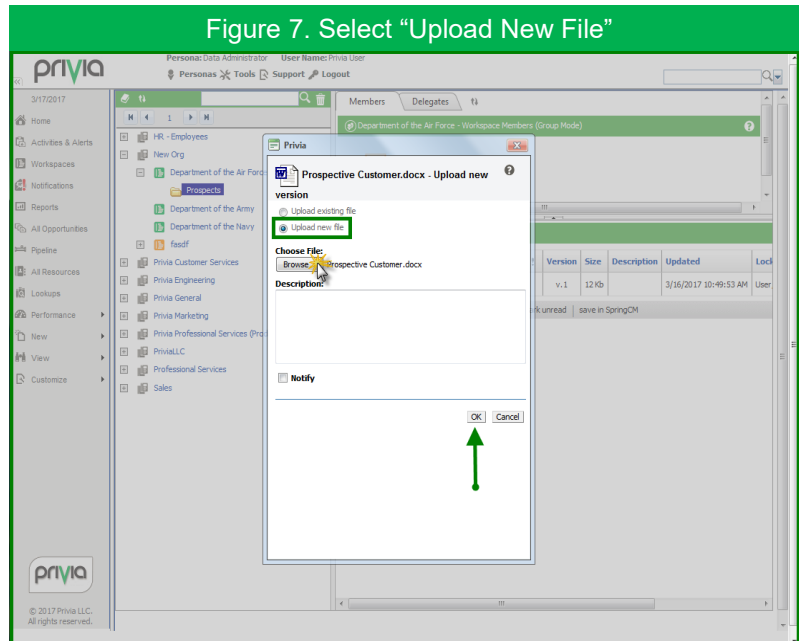


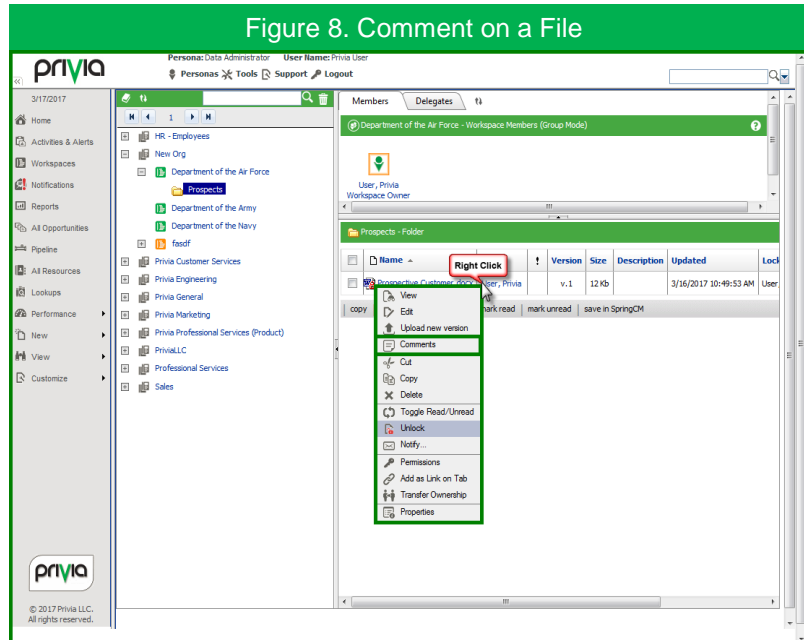
Figure 7. Select “Upload New File”



## Best Practice: Commenting in Pure Web

The Privia Commenting tool is a Windows based .NET application that is installed as part of the Privia Platform client. When using the Pure Web client, security in the browser is not allowed to launch an installed program so the Privia Commenting tool cannot be used even if the Privia Platform client is installed.

The Privia Pure Web client can still display the comments related to a document but cannot display the document or the location of the comments. In Pure Web, right clicking on a document and choosing “Comment...” will open a window and display comments that are already in the file. Additionally, new comments may be created in this dialog as well.



If a user has the Privia Platform client installed and is using IE but sees a window similar to this one, then IE is operating in Pure Web mode. If the user wants to use the full Privia Commenting tool that displays the document inside the window, then the ActiveX controls for IE must be enabled and the Privia User Options must be set to enable Internet Explorer integration.

## Summary

While the Privia Enhanced Web client and the Privia Pure Web client look identical, there are minor differences in how documents must be handled between the two interfaces. Using the best practices in this document will help avoid any loss of data due to using the browser cache.

