Working with Documents in ProjectWise

Using ProjectWise is much like using Windows Explorer for storing and working on documents. Documents are stored in a folder structure and are associated with the appropriate application for opening and editing. ProjectWise provides much more useful information and functionality than Windows Explorer for your project documents.

There is a wide range of topics about working with documents in ProjectWise. This material focuses on the following areas of interest:

- <u>Creating documents</u>
- <u>Assigning document types</u>
- Document attributes
- <u>Audit Trails</u>
- Previewing documents
- <u>Exporting</u>

Creating documents in ProjectWise

There are several ways to create new documents in ProjectWise. You may save a new document created in an application, drag and drop it from Windows Explorer, or use the ProjectWise New Document creation tools. Additional properties or attributes are applied to each document based upon its document type. The method of creating a document in ProjectWise determines how the document type is selected and applied.

In certain applications such as Microsoft Office and Bentley products, it is good practice to launch the application, create a new file and then save it into ProjectWise. These applications are **fully integrated** with ProjectWise so they will always prompt you to save to ProjectWise first.

Folder		Save
Corresponde	nce Select	Save to dis
Document		Cancel
Name:	Letter.docx	Cancer
Description:	Description of Letter	
File Name:	Letter.docx	
Format:	Word Document (*.docx) Format	
Application:	Department:	

The drawback of creating documents like this is that you are not prompted for a document type to apply to the new file. An additional step is required to assign the document type, which is explained in the next topic.

You may also use the **'drag and drop'** method of adding documents into ProjectWise. Files that are stored outside of ProjectWise can be dragged into the appropriate folder in ProjectWise. You can drag in multiple files simultaneously. You will see a **Document Info** window pop up with three pick list menus for **Document Group**, **Document Category** and **Document Type**.

Document (Group	
Preliminary	/ Engineering	•
Document (Category	
Design		•
Document ⁻	Гуре	
Correspon	idence	•
	ОК	Cancel

After entering the appropriate information in those pick list menus for your document, you will be prompted to **Select a Wizard**.

	5		OK
No Wizard	Advanced Wizard	ProjectWise InterPlot Or	Cance

Note: If you have checked the box in the past to make one of the wizards the default, this window will not display but your default choice will be used.

Selecting **No Wizard** will just import the document into ProjectWise and not ask for any further information. You will need to open the **Document Properties** (right click on the document and select Properties or select the document and hit the spacebar) to fill in specific document attributes based upon the document type.

General Securit	y Attributes	More Attributes	File Properties	Audit Trail	Geospatial V	Norkspace
Document Gro	oup	Document Cat	egory	Documer	t Type	
Preliminary Engli	neering	Design		Correspon	dence	
		Proje	ct Propertie	s		
Project ID De	escription					
0008429 S	R 316/US 29	@ SR 81				
Primary Count	ty D	OT District	Route Numb	er P	roject Length	n (mi)
Barrow	1		031600		1	
Counties						
Barrow						
Project Accou	inting Numb	er ROW Acco	ounting Number	MPO		
CSNHS-0008-0	0(429)			Atlan	ita TMA	
Primary Work	Туре			MPO	TIP ID	
Interchange				BA-0	26	
Project Manag	jer		Project Ma		Ce	
Curtis, Dylan			Program De	elivery		
		esign Consultar	nt Name			
GDOT Roadwa	y Design J Hi	lliard				
		Docum	ent Properti	es		
Source/Autho	r					
	<i>h</i>					

Selecting **Advanced Wizard** will step you through several screens of information you need to enter. This is the recommended wizard. The first screen sets the location. It will default to the folder where the document was dropped, but you may change it if that location was incorrect. Click **Next**.

elect Target Folder You should select the folder, where document(s) will be created.	5
Select the folder:	
Planning & Programming Procurement Procurement Program Delivery Right of Way CAICE DOS CAICLING CONCEPT Concept Concept Concept DOS Cost Estimates DOS DOS Visi DOS Prosing DOS DOS Visi DOS DOS Visi DOS DOS Visi DOS Prosing DOS Prosing DOS DOS Visi DOS Prosing DOS DOS Visi DOS Prosing DOS P	F

The next screen sets the template to use for the new ProjectWise document. The file you dropped into ProjectWise is automatically selected as the template. Click **Next**.

elect a Template Select an existing ProjectWise document or an external file to use as a template for the document(s) you are creating.	
	1.00
) Use ProjectWise document as a template	Select
Use external file as a template	
C:\Users\kpatterson\Documents\PW\PWTipsandTricks.pdf	Browse
) Select from recent used templates	
pw:\\gdot-go-pwis01.gdot.ad.local:ProjectWise\Documents\Projects\PW Admin Test F pw:\\gdot-go-pwis01.gdot.ad.local:ProjectWise\Documents\Projects\PW Admin Test F	
pw:\\gdot-go-pwis01.gdot.ad.local:ProjectWise\Documents\Projects\PW Admin Test F	
< F	
۲	

The next screen displays the Document Attributes. The specific attributes shown and the layout of them is based upon the document type selected earlier. The Document Group, Document Category and Document Type fields may be blank but **do not** fill them in at this time. They will be automatically filled in upon completion of the wizard. The information under the **Project Properties** heading is automatically filled in from other databases such as *TPro* and *TrnsPort*. You should fill in any field listed under the **Document Properties** area on this screen if that information is known. You can always come back to these attributes later using Document Properties. Click **Next** when complete.

ſ	Advanced Document Creati	ion Wizard			X
	Define Document Attri You should define en	i butes vironment specific doc	ument attributes.		4
Do Not Fill In 💻	Document Group	Document Cate	egory Do	ocument Type	
	Project ID Descriptio	n	otProperties		
	0009887 SR 372 @ Primary County Cherokee	SR 369 DOT District 6	Route Number 037200	Project Length (mi) .25	
	Counties Cherokee				
	Project Accounting Nu Primary Work Type	Imber ROW Acco	unting Number	MPO Atlanta TMA MPO TIP ID	
	Roundabout Project Manager		Project Manag	ger Office	
	Fernandez, Ryan Design Group Manage	r/Design Consultan	Program Delive	ry	
	GDOT Roadway Design	S Woods	ent Properties		
Fill In if Known	Source/Author		oner roportioo		
			<	Back Next >	Cancel

The next screen gives you the opportunity to rename the document, give it a description, and set an original version name if desired. The Application pick list should automatically choose the appropriate software to use when the document is opened for viewing or editing. Click **Next** when complete.

Detrie required document properties - the name and the file name. Optionally, you can also define document description and version string.	cument Properties		្រ
BW Tpsand Tricks pd: Image: Comparison of the new document PW Tpsand Tricks Image: Comparison of the new document file name PW Tpsand Tricks.pdf Image: Comparison of the new document Version Image: Comparison of the new document Application: Image: Comparison of the new document	Define required document properties - the name and the file name. Optionally, you can also define document description and version string.		7
Description for the new document PWTpsand Tricks We document file name PWTpsand Tricks pdf Urision Application:			
PWTpsandTincks New document file name PWTpsandTincks.pdf Version Application:	PWTipsandTricks.pdf		
New document file name PWTpsand Tricks pdf Version Application:	Description for the new document		
PWTipsandTricks.pdf	PWTipsandTricks		
Version Application:	New document file name		
Application:	PWTipsand Tricks.pdf		
	Version		
	Application:		
[]		•	
		0.020	

The next screen displays the summary of all the choices made on previous screens. When you click **Next** here, the document will be created.

	ment d document properties creation process by clicking Next.	5
Wizard will create	a new document with the following specifications:	
Target Folder :		
		E
+ Name	: Correspondence	=
+ Description		
Template :		
+ Name	: PWTipsandTricks.pdf	
	Evternal template (OS file)	
+ Folder Name	: External template (OS file) : C:\Users\kpatterson\Documents\PW	
+ Folder Descri	ption : OS Path	
Document Attribu	tee '	
+ Label		
+ Value		
+ value + Label	2	
+ Laber + Value		
+ value + Label	· · · · · · · · · · · · · · · · · · ·	
+ Label + Value		
+ value + Label		
+ Value		
+ Label		
+ Label + Value		
+ value + Label		
+ Label + Value		
+ value + Label	· · · · · · · · · · · · · · · · · · ·	
+ Laber + Value		
+ Label		
+ Value		
+ Label	ROW Accounting Number	
+ Value	. No the Accounting Number	
+ Label	Route Number	
Launch assoc		-
	< Back Next >	Cancel

The final screen displays the success of the document creation. Click **Finish** to complete the wizard.

Advanced Document Creation	Wizard
	Completing the Advanced Document Creation Wizard You have successfully completed the Advanced Document Creation Wizard. The document(s) you have defined were successfully created. To close this wizard, click Finish.
	< Back Finish Cancel

Note: If multiple files are dragged into ProjectWise, the same document type will be applied to all of them, so select your group to drag in wisely.

The last method of creating documents in ProjectWise is using the built in tools in ProjectWise Explorer. This method is not recommended since this will only create a database record for the document. The actual file itself would still need to be created using one of the methods above and then a link would need to be created between the new document and the file.

Assigning Document Types

If a document was created in ProjectWise directly from an application, such as Microsoft Office or any Bentley products, you were not given the opportunity to assign a document type. You can assign the document type after the document is in ProjectWise by selecting the document in ProjectWise Explorer, right click on it, and select **Assign Document Type**.

Batch Print	
Properties	
Assign Document Type	

The **Document Info** tool will appear with the three pick list menus for Document Group, Document Category, and Document Type. Select the appropriate values and click **OK**.

_

The Assign Document Type tool can be used on any existing documents in ProjectWise, such as documents in pilot projects that were in place prior to the availability of the tool. It can also be used to change a document from one type to another if needed.

The tool can be used to set the Document Type for multiple documents simultaneously. Select the set of documents you wish to assign a type, right click, and select Assign Document Type. The choices made in the Document Info pick lists will be applied to all of the documents in your selection.

Document Attributes

Each document type has a specific set of attributes. If you created documents using the Advanced Wizard as explained above, you were prompted to input the attributes for the document during creation. You can always view and edit the Document Attributes any time in ProjectWise by looking at the **Document Properties**.

To access the Document Properties, simply select the document, right click, and select **Properties**. Or you can select the document and press the **Spacebar** on your keyboard.

The attributes are found on the **Attributes Tab**.

General Security Attri	butes N	Icre Attributes	File Properties	Audit Trai	I Geospatial Wo	rkspace	
Document Group	De	ocument Cat	egory	Docume	ent Type		
Preliminary Engineering	D	esign		Correspo	ondence		
		Proje	ct Properties	S			
Project ID Description							
0008429 SR 316/U	IS 29 @	SR 81					
Primary County	DOT	District	Route Numb	er	Project Length (mi)	
Barrow	1		031600		1		
Counties							
Barrow							
Project Accounting	Number	ROW Acco	unting Number	r MPC	0		
CSNHS-0008-00(429)			Atla	anta TMA			
Primary Work Type				MPC	D TIP ID		
Interchange				BA	-026		
Project Manager			Project Ma	nager Of	fice		
Curtis, Dylan			Program De	elivery			
Design Group Manag	ger/Desi	gn Consultan	nt Name				
GDOT Roadway Desig	n J Hilliar	d					
		Docum	ent Propertie	es			
Source/Author							
oourocandunor							

As you can see by comparing the Attributes tab in the image above and the image below, the amounts and types of attributes change due to the document type.

ieneral	Security	Attributes	More Attributes	File Properties	Audit Trail	Geospatial Workspace
Docume	nt Grou	p	Document Ca	tegory	Document	Туре
Environm	ental		Cultural Work P	roducts	Early Coord	lination
			Proje	ect Properti	es	
Project I	D Des	cription				
0008429	SR	316/US 29	@ SR 81			
Primary	County	DOT	list	Length (mi)	MPO	
Barrow		1		1	Atlanta TM	IA
Counties	5				MPO TIP I	D
Barrow					BA-026	
Proj Acc	ounting	Number	ROW Accou	unting Number	Project M	anager
CSNHS-	0008-00(429)			Curtis, Dy	lan
Primary	Work				Project M	anager Office
Interchar	nge				Program D	elivery
			Docum	ent Propert	ies	
Date Sul	omitted	Date	Received	Date Approv	ed	
Addend	um/Reev	al Miti	gation Reqd	Cemetery	Bridge ID	# HPA
		-	· · · · · · · · · · · · · · · · · · ·			
Source/	Author				7	
Author's	Organi	zation/Fir	m			
Primary	Consult	ant				
Sub Con	sultant					

The Document Properties area at the bottom of the window contains the attributes that need to be filled in with the appropriate information for that specific document. This information is important for use in searching for documents throughout the ProjectWise system. Refer to the <u>Using ProjectWise</u> <u>Searches</u> training document for more information.

Document Audit Trails

Every action taken on every document and folder stored in ProjectWise is captured in the **Audit Trail**. The data captured includes check in, check out, copying out, exports, and comments. The data and time of the event and who was responsible is also captured.

To access the Audit Trail of a document or folder, simply select it, right click, and select **Properties**. Or you can select it and press the **Spacebar** on your keyboard. Click the **Audit Trail** tab at the top.

eneral Secu			e Properties Audit Trail Geospatia	al Workspace
Action Name	Date/Time	User	Additional Data	Comments
Checked	8/13/2014 6:31:59 AM	01012680		=
out Freed	8/13/2014 6:42:52 AM	01012680		
Checked out	8/13/2014 2:13:30 PM	01012680		
Checked in	8/13/2014 3:11:55 PM	01012680	Copy left	
Member added	8/13/2014 3:11:55 PM	01012680	Member document '0000481PROP.dgn'	
Checked out	8/14/2014 9:11:31 AM	01012680	and the set to a first second	
Freed	8/14/2014 9:22:33 AM	01012680		
Copied out	8/15/2014 6:54:17 AM	wthomas		
Checked out	8/15/2014 7:07:59 AM	01012680		
Checked in	8/15/2014 3:00:15 PM	01012680	Copy left	
Checked out	8/18/2014 6:57:24 AM	01012680		
Freed	8/18/2014 9:24:50 AM	01012680		
Checked out Checked in	8/18/2014 10:34:31 AM	01012680	Comula [®]	
Checked in Checked	8/18/2014 3:02:13 PM 8/19/2014	01012680	Copy left	
Customize.	1	01012680	Save	As

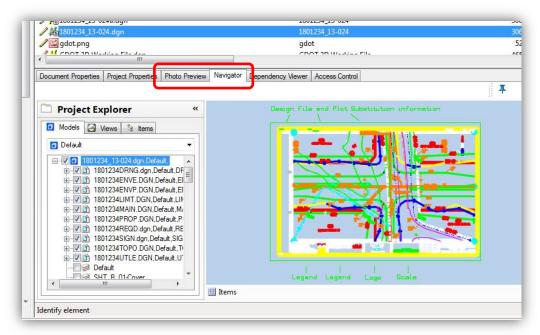
The **Comments** column on the far right shows any information entered upon document check in or when **Add Comments** is selected from the right-click menu in ProjectWise Explorer.

To alter the date range, columns, and other information the audit trail displays, click on the **Customize...** button near the bottom left corner of the window.

Objects	Actions I	Jsers D	Date	Output Columns	Sorting and	Grouping	
Period:							
[in the last 30) days				•	
Custon	n Date:						
<u> </u>	Specify start o	late					
	9/10/2014			3:51:35 PM		A V	
<u> </u>	Specify end d	ate					
	9/10/2014			3:51:35 PM		A V	

Previewing Documents

In ProjectWise Explorer, the bottom right part of the application window is named the **Preview Pane**. This area displays valuable information about the documents or folders selected in the upper areas of the ProjectWise window. Information such as properties, attributes, and file dependencies are available in their specific tabs. A visual preview of most file types is also available using **Photo Preview** or **Navigator** tabs.



The **Navigator** tab will only preview V7 and V8 DGN files. It will allow you to zoom, pan, change level display, and view saved views. It will also display all references files attached.

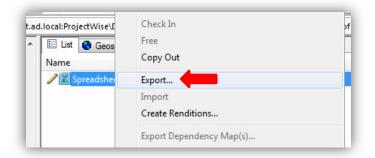
The **Photo Preview** tab will preview many other file types. It can display PDF, Word, Excel and image files. It will also display V8 DGN files, but V7 DGN files are not supported.

Exporting Documents from ProjectWise

There are occasions when a document needs to be saved outside of ProjectWise. The main reason would be to use an application that is not integrated into ProjectWise.

ProjectWise Explorer provides two methods for exporting documents: managed and unmanaged. It is recommended to use the managed method if possible to easily enable importing of modified documents back into ProjectWise.

To export a document from ProjectWise, select the document in ProjectWise Explorer, right click and choose **Export**.



The **Document Export Wizard** will display, offering two options.

Document Export Wizard	Welcome to the Document Export Wizard
	Choose an action to perform Export - Locks file, changes can be re-imported Send to Folder - Creates unmanaged local copy The Export option will lock and download managed copies of the selected documents so they can be edited outside of ProjectWise and later imported using Document > Import.
	< Back Next > Cancel

The first option is **Export**, which is the managed and preferred method. The document is locked in ProjectWise for editing for everyone once exported and can be imported back into ProjectWise later.

The second option is **Send to Folder**, which makes a separate copy of the document in the location of your choosing. The ProjectWise version remains editable since it is completely disconnected from the exported copy. This method does not allow importing of the document back into ProjectWise. You would need to drag and drop it back into ProjectWise.

After making your selection and clicking **Next**, the next step is to determine the location of the exported document. Click the **Browse** button to set the appropriate folder for the Export. Click **Next** to start the exporting process.

Document Export Wizard	
Define the export settings Specify an export folder and click Nex	at to begin the export.
Export folder:	
C:\temp	Browse
Export comment:	
Previous Comments:	•
	< Back Next > Cancel
	VALE

Once the export process is complete, you will see the success screen. Click **Finish** to exit.

Doo	cument Export Wizard
	Review document export results Review the information below about document export results.
	Document Export was successfully completed. Press Finish button to exit.
	< Back Finish Cancel

If you chose the first Export option (managed), and you are ready to import the modified document back into ProjectWise, there are two ways to perform the operation. First, you can locate the exported document in ProjectWise Explorer, right click, and select **Import**.

ad.local:ProjectWise\Doc	Free Copy Out	
Name	Export	
Spreadsheet.x	Import	
	Create Renditions	
	Export Dependency Map(s)	
	Import Dependency Map(s)	
	Update Server Copy	

You will be prompted for a comment as in any document check in procedure. When you click **OK** the document will be imported back into ProjectWise.

The other method to import the document back into ProjectWise is to use the **Local Document Organizer**. This is useful for importing multiple documents from several locations in ProjectWise since all exports will be listed together.

Datasource	Folder	Document	Export
: 🗋 😪 🕾		0 <u>0 °a </u> ir 8	0- 0 0
		Address 🔀	

Click on the **Exports** icon to see a list of all your exported documents. Select the documents in the list you wish to import, right click on them, and choose **Import**. The comments window will display allowing you to add comments upon the check in of the document.

Organize View Action	Nocal Document Or	rganizer - Exports						
Filtes Datasource: ProjectWise Node: gadp3217960 User: kpatterson Folder: Name Description Type File Name Folder: Import Folder Property Q Import Free Import From		-						
Node: godp3217960 User: kpatterson Folder: Name Description Type File Name Folder Name 2 Local File File Spreadsheet, view Tast Socie Evrorted c:\temp\Spreadsheet.xisx Property Q Open Folder Update Server Copy Free Import Import Free		3 🗭 🗗 🔗	i ≱ √ I	N 🗞 🗟 🖏				
User: kpatterson	Datasource:	ProjectWise						
Folder: Name Description Type File Name Folder Name Z Local File File Import Free Update Server Copy Free Import Free Import Free Import Free	Node:							
Name Description Type File Name Folder Name Colder Name Spreadsheet.view Test Sovie Evnorted cytemptSpreadsheet.visx Property Spreadsheet.visx Open Folder Update Server Copy Free Import Import Free Import From Import From	User:							
Spreadsheet.vlsv Teet-Sove Evourted cittemp\Spreadsheet.vlsv Property <table-cell></table-cell>	Folder:							
Open Folder Update Server Copy Free - Leave Copy Free Import Import From	Name	Description	Туре	File Name	Folder Name	2	Local File	File Re
Update Server Copy Free - Leave Copy Free Import Import From	Spreadsheet.visv		Exported	c:\temp\Spreadsheet.xlsx	Property			
Free - Leave Copy Free Import Import From		Open Folder						
Free Import Import From		Update Server	Сору					
Import Import From		Free - Leave C	ору					
Import From		Free						
		Import 🛑						
		Import From						
	•							
l object(s)	1 object(s)							