

Document Control Log (DCL) Automation

REQUIRED COMPONENTS

The following two files must be installed in order for the DCL Automation to function correctly. To have them installed, please submit a request to the [Solutions Center](#) with a subject of “ProjectWise” requesting that the ProjectWise DCL Automation files be installed.

- **GDOTPWClientExtForConstructionAdminsSetup01CE.msi**
- **GDOTPWClientExtSetup05CE.msi**

NOTES

- The automation only works inside ProjectWise on the folders under *CST\Construction Project Files*.
- The *CST\Construction Project Files\02_Document Control Log* folder must not be renamed for the automation to work correctly.
- When adding files to the DCL, it will add them based on their “File Updated” date/time in ProjectWise.
- In the Description column in the DCL (Column “C”), the ProjectWise Description is used for these fields. As shown below, each file in ProjectWise is stored with a Name and Description. Typically, these are the same unless they are manually changed. The Description is used in the DCL for the Description column.

| | |
|--------------|---|
| Document | |
| Name: | AS-BUILT FOUNDATION INFORMATION PROCESSING.docx  <input checked="" type="checkbox"/> |
| Description: | AS-BUILT FOUNDATION INFORMATION PROCESSING.docx |

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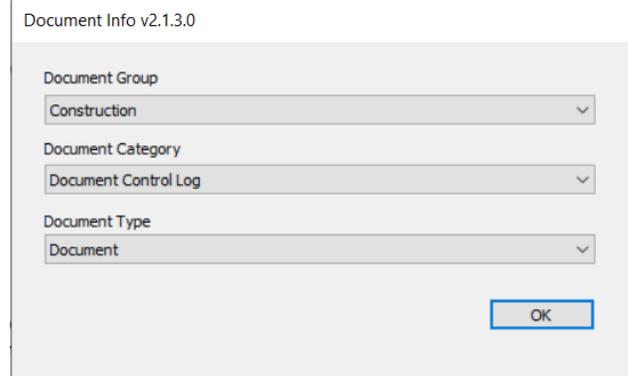
[Associating a Doc Type to existing files so they are included in the DCL](#)

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Uploading Documents into ProjectWise

As files are brought into ProjectWise that need to be listed in the Document Control Log, the following steps are to be taken.

1. Drag and drop the file(s) into ProjectWise.
2. Complete the Document Wizard selections as shown below and click on OK.
 - a. **Document Group:** *Construction*
 - b. **Document Category:** *Document Control Log*
 - c. **Document Type:** *Document*



Document Info v2.1.3.0

Document Group
Construction

Document Category
Document Control Log

Document Type
Document

OK

3. After it loads the document(s), an interface will automatically appear in order to enter the attributes for the document(s).
 - a. Make sure to click on the **Attributes** tab at the top if you do not see a screen to enter the attributes as shown below.
 - b. Under the **Document Properties** at the bottom, complete all the fields that are required for the document (see below for a description of the fields).
 - c. Once all desired/required fields have been completed for the document, click on **Save** at the bottom. The document will be stored in ProjectWise with the attributes you entered.
 - d. If there is only one document, click on **Close**.
 - e. If there is more than one document, click the right arrow at the bottom to move to the next document and to enter its **Document Properties**.



- f. Under the **Document Properties** at the bottom, complete all the fields that are required for the document and click on **Save**.
- g. Continue performing steps (e) and (f) until all documents have been processed. When complete with all documents, click on **Close**.

- **Assoc With** – Enter the Doc Number of the document in the DCL that this document is associated with (if applicable/desirable)1026
- **Doc Date (REQUIRED)** – The date on the document
- **Date Recd (REQUIRED)** – The date the document was received by GDOT
- **Response** – Yes or No drop-down if a response is required
- **Days Due** – (Optionally used if **Response** is set to Yes) If a response is due, the number of calendar days until the response is due. The number is the number of calendar days, not business days. The automation will convert the number of calendar days to a date in the DCL when it is generated.
- **Forward** – Select *FWD* if the letter is to be forwarded for approval, signature, etc. or leave this field blank if not
- **Fwd Link** – The Doc Number of the document in the DCL that is Associated to the forwarded document
- **Type** – Dropdown of selections of types of documents
- **From (REQUIRED)** – Person or company the document is received from
- **To (REQUIRED)** – Person or company the document is being sent to
- **Document Remarks** – Any specific remarks related to the document
- **Document Description** – A description of the document (included under the column “Additional Description” in the resulting Doc Control Log file)

Saving Emails & Email Attachments to ProjectWise to Include in the DCL

To save emails for inclusion into the DCL, open the message in Outlook and do a “Save As” to a .msg file and then drag the msg file into ProjectWise and it will work as any other file with the automation.

However, to save an attachment to an email into ProjectWise for inclusion into the DCL, follow the steps below. Any other method will cause the automation to not function correctly and there will be errors in the DCL file.

1. Drag the attachment from the email message to the desktop on the computer.
2. Then, drag and drop the file from the desktop to ProjectWise and it will work as any other file with the automation.

Creating the DCL Report in ProjectWise

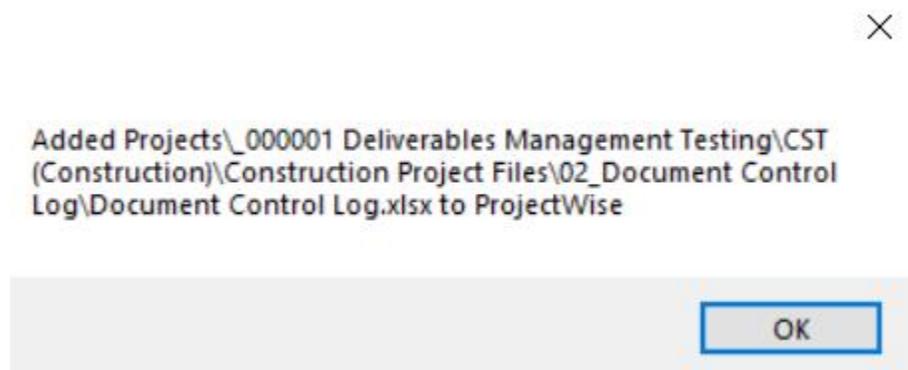
The Document Control Log Report command can be run at any time. It will create a document by the name of *PI#_Document Control Log.xlsx (1234567_Document Control Log.xlsx)* in ProjectWise in the *CST\Construction Project Files\02_Document Control Log* folder. If a file already exists, it will be overwritten.

To run the report command:

1. Right-click on any folder under *CST\Construction Project Files* and click on **Construction Documents Report**.

NOTE: If you do not see this option, please submit a request to the [Solutions Center](#) with a subject of “ProjectWise” requesting that the ProjectWise DCL Automation files be installed.

2. A message will be displayed in the bottom left corner of the ProjectWise window that will provide a status of the report running.
3. When complete, a message box will be displayed as shown below to let you know it is complete.



4. Click on **OK** to close the message box.

Using the *Assoc With* Property in the DCL Report

Once the Document Control Log document has been created, there is functionality that can be used to group the documents contained in it for easier use by using the **Assoc With** property.

The property must be entered in the interface (see below) when the document is first uploaded into ProjectWise.

Document Properties

| Assoc With | Doc Date | Date Recd | Days Due |
|------------|----------|-----------|----------|
| | | | |

When uploading a document and it is related to another document already in the DCL in ProjectWise, simply enter the **Doc Number** of the related document in the **Assoc With** field in the interface.

| Doc # |
|-------|
| 1 |
| 2 |
| 3 |
| 4 |
| 5 |

This entry will get stored with the document being uploaded and will display in the DCL Report in Column 2.

| Doc # | Assoc With |
|-------|------------|
| 1 | |
| 2 | |
| 3 | |
| 4 | 1 |
| 5 | 3 |
| 6 | 2 |
| 7 | 3 |
| 8 | 5 |
| 9 | 6 |
| 10 | 2 |
| 11 | 3 |
| 12 | 5 |

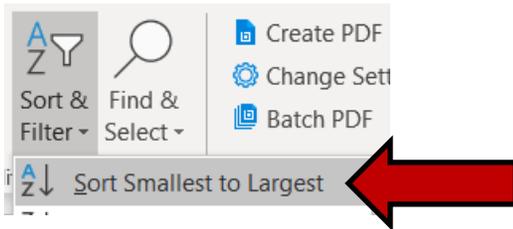
Now, all the related documents can be grouped together. They will be grouped from the first document loaded to ProjectWise at the top to the last document loaded at the bottom.

To do so:

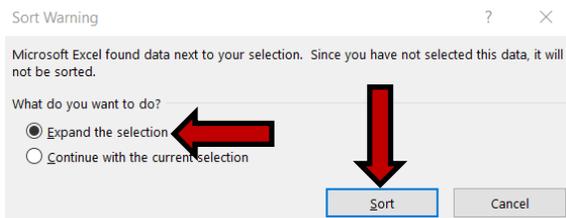
- 1) Click on the first cell under the Assoc With column.
- 2) In that first cell, press the left mouse button and hold it down while dragging down the **Assoc With** column highlighting all the cells under that column and then letting go of the mouse button (see below).

| Doc # | Assoc With |
|-------|------------|
| 1 | |
| 2 | |
| 3 | |
| 4 | 1 |
| 5 | 3 |
| 6 | 2 |
| 7 | 3 |
| 8 | 5 |
| 9 | 6 |
| 10 | 2 |
| 11 | 3 |
| 12 | 5 |

- 3) Under **Home** in the top Excel menu, select **Sort & Filter** and then select **Sort Smallest to Largest**.



- 4) In the warning box, click on **Expand the Selection** and then click on **Sort**.



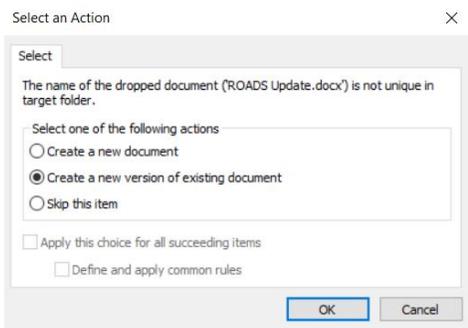
- 5) The **Assoc With** column now should sort, grouping related documents together.

| Doc # | Assoc With |
|-------|------------|
| 4 | 1 |
| 6 | 2 |
| 10 | 2 |
| 5 | 3 |
| 7 | 3 |
| 11 | 3 |
| 8 | 5 |
| 12 | 5 |
| 9 | 6 |

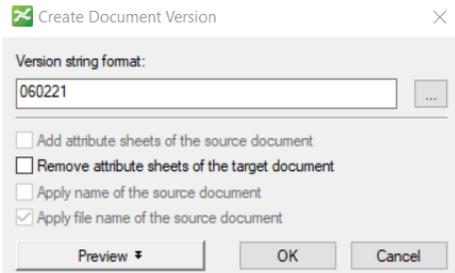
Updating files already listed in the DCL (Creating Versions)

In the case where files that are already listed in the Doc Control Log need to be updated, there is no need to delete the files and bring in a new file. Additionally, this is discouraged due to it creating skips in Document Numbers in the Doc Control Log. The recommended method of making updates is to use versions of files as follows.

- 1) Drag/drop the updated file into the appropriate Construction project Files folder in ProjectWise.
- 2) Select **Create a new version of existing document** as shown below and then click on **OK**.



- 3) In the *Create Document Version* dialog, enter the version name (ie: 060221) such as the date and then uncheck **Remove attribute sheets of the target document** and click on **OK**.



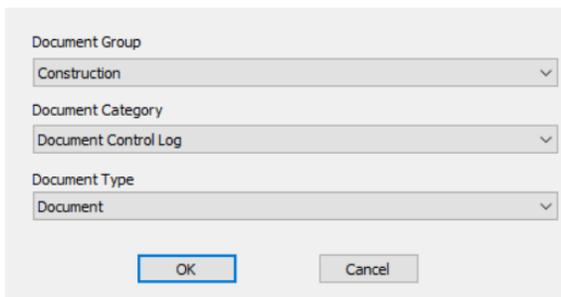
- 4) This will create a new current/editable (📝) version of the file and saves the previous version as read-only (📖). This process will build a history of your files in ProjectWise.
- 5) Run the **Construction Documents Report** once again and the updated file will be reflected in it with the same *Doc Num* as before.

Associating a Doc Type to existing files so they are included in the DCL

As the Doc Control Log automation is implemented, it is to be used on new projects as well as existing projects. If you already have files in the Construction Project Files folders in a project, they can quickly be setup to be used in the new Doc Control Log. The following steps are to be used to be sure they are setup correctly.

- 1) Select a *Construction Project Files* folder that contains files to be included in the Doc Control Log.
- 2) Select the files to be included in the Doc Control Log.
- 3) Right-click on one of the files and select **Assign Document Type**.
- 4) Select the following and click on **OK**.
 - **Document Group: Construction**
 - **Document Category: Document Control Log**
 - **Document Type: Document**

Assign Document Type v2.1.8.0



The image shows a dialog box titled "Assign Document Type v2.1.8.0". It contains three dropdown menus. The first is labeled "Document Group" and is set to "Construction". The second is labeled "Document Category" and is set to "Document Control Log". The third is labeled "Document Type" and is set to "Document". At the bottom of the dialog are two buttons: "OK" and "Cancel".

- 5) To add the *Document Date, Received Date, To, and From* and any other attributes, simply select each file, right-click and select **Properties**, enter the desired Document Properties at the bottom of the dialog, and then click on **Save**.
- 6) Run the **Construction Documents Report** again and the added files will be shown appended to the end of the Doc Control Log with the next available Doc Num.

Remove a File From the DCL

If a file is to no longer be included in the DCL, follow the steps below to correctly remove it from the DCL.

1. Select the file(s) in ProjectWise.
2. Right-click on the file(s) and select Assign Document Type.
3. Choose something other than Construction/Document Control Log/Document.
4. Re-run the DCL Report and the file(s) will no longer be in the DCL Report.

NOTE: The Doc Num of the file(s) removed will no longer appear in the DCL. This is due to those Doc Num's being assigned to those specific documents, and if they are removed, they no longer appear in the DCL as it should be.