CDOT Workflow – Posting ROW Plan Authorization Forms in ProjectWise

This document describes the procedures for installing ProjectWise on a computer, placing documents in the correct location within ProjectWise, and accessing documents from ProjectWise.

Document Conventions

<D> - Press the left mouse button one time.

<D><D> - Press the left mouse button twice in quick succession.

<R> - Press the right mouse button one time

Installing ProjectWise from Run Advertised Programs

The steps below describe how to install the ProjectWise software from Run Advertised Programs. Run Advertised Programs contains software that all CDOT users can install without special permissions.

Note: If ProjectWise V8i (SELECTseries 2) is loaded, it will have to be uninstalled prior to loading the ProjectWise V8i (SELECTseries 3) software. Contact your local IT person to have the old software removed.

The first step to installing software is to verify that the desired software is not already installed.

1. Select **Start Menu > All Programs**. Scroll down the list looking for the *Bentley* folder. If there is no *Bentley* folder, proceed to step 3.
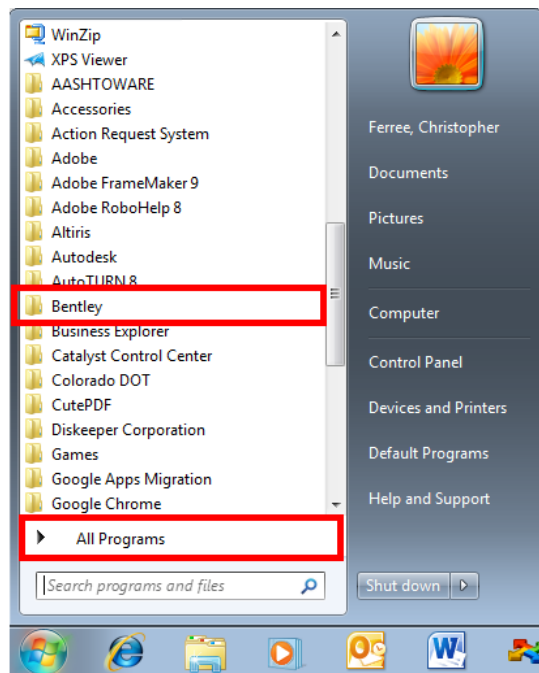
2. Expand the **Bentley** folder and note which products are installed. If there is a *ProjectWise V8i (SELECTseries 3)* folder then the software is already loaded and the remaining portion of this section can be skipped.

3. Select Start **Menu > Control Panel**. The *Control Panel* dialog box is displayed.
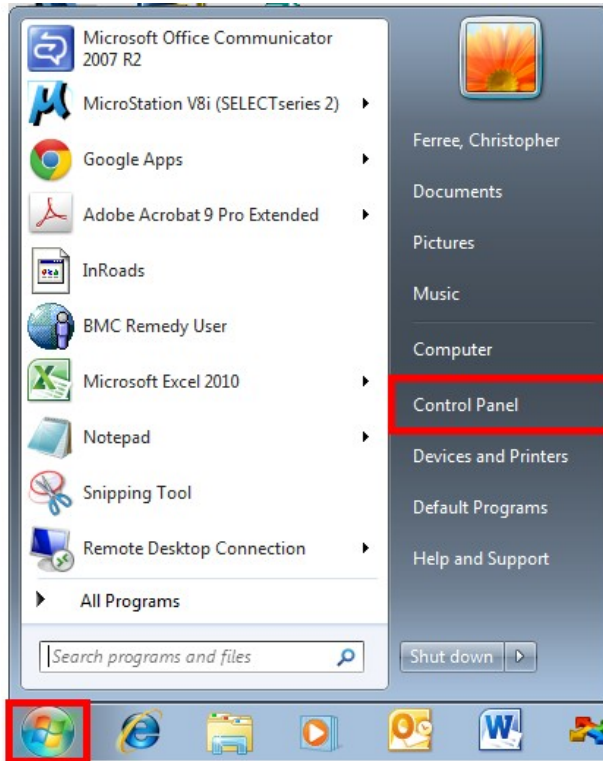
4. In the *Control Panel* dialog box, **<D>** on **Programs**. This displays the Programs pane in the *Control Panel* dialog box.
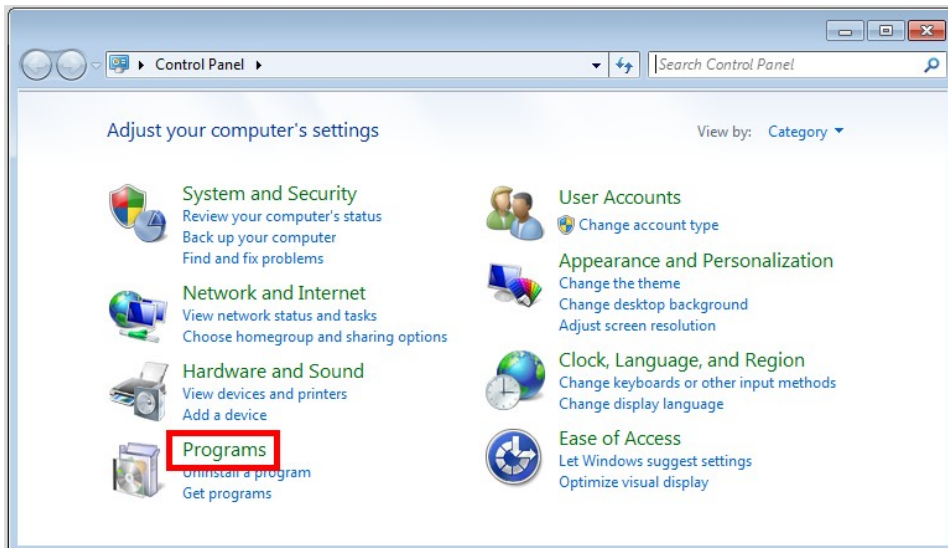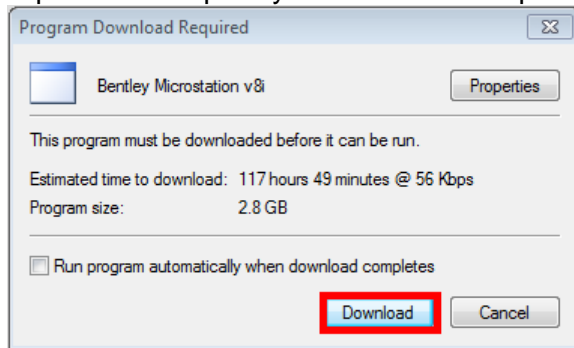
5.   In the *Programs* pane, **<D>** on **Run Advertised Programs (32-bit)**. This displays the *Run Advertised Programs* dialog box.
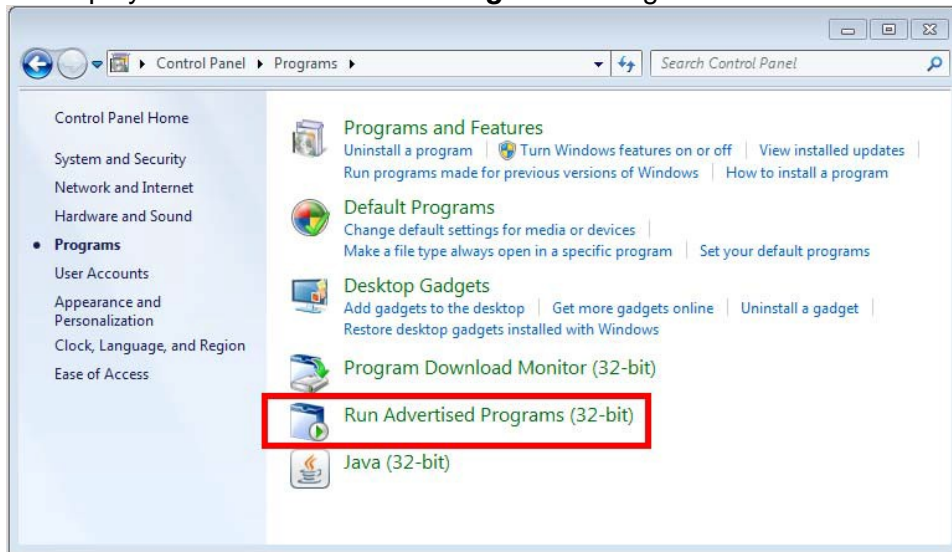

6.   In the *Run Advertised Programs* dialog box, highlight **Bentley ProjectWise SS3**. **<D> Run** to launch the program. This displays the *Program Download Required* dialog box.
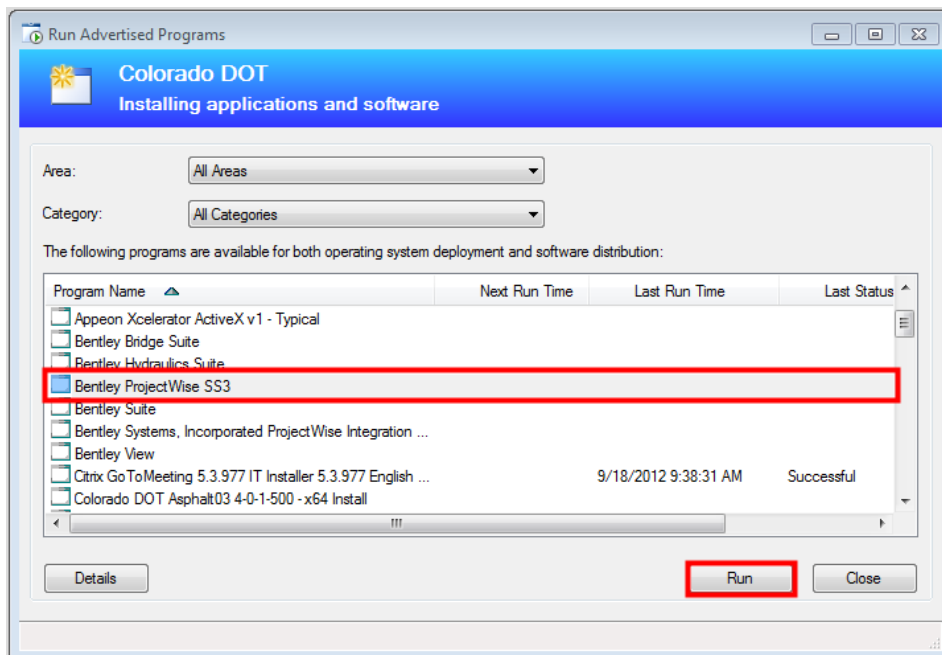
7.	In the ***Program Download Required*** dialog box, **<D> Download**. The installer is copied to a temporary folder on the computer.


8.	Once the download is complete, ***the Program Ready to Run*** dialog box is displayed. **<D> Run** in this dialog box. This displays the ***Installation Progress window***.
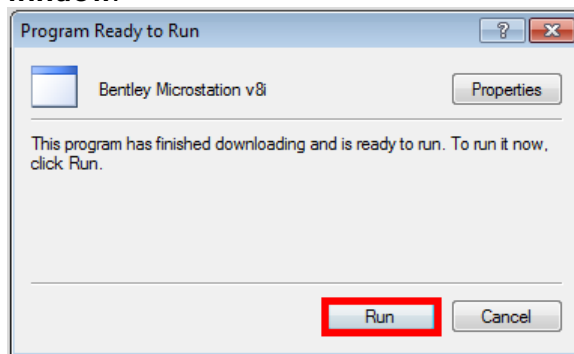
When the installation is completed the ***Installation Progress*** window disappears. The programs are now ready for use.
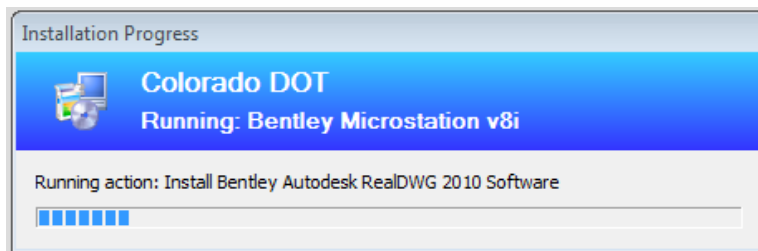
9. Repeat steps 6 through 8, highlighting **Bentley Systems, Incorporated Integration Module for Microsoft Offic 08.11.9408 English (United States) – Per-systems attended.**
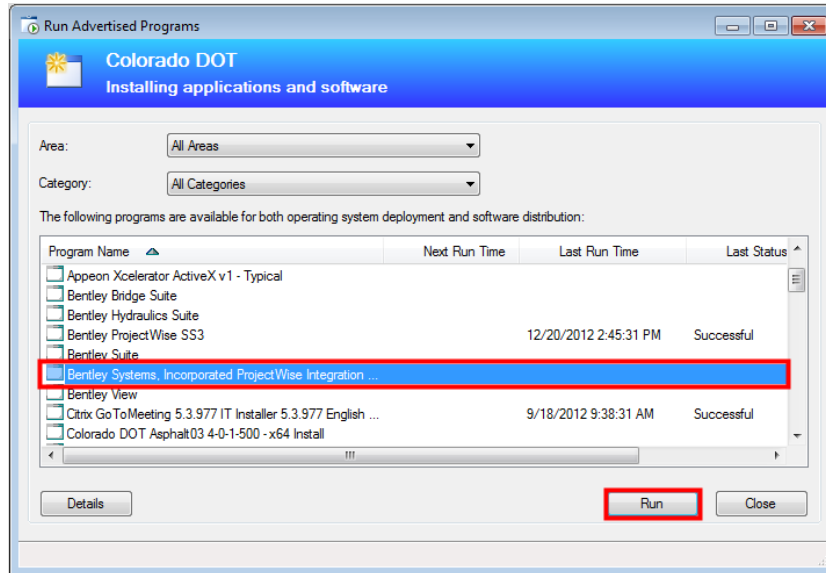
10. **Close** the **Run Advertised Programs** and **Control Panel** dialog boxes. This completes the installation of the ProjectWise software.

Adding Files to the ProjectWise ROW_Plan_Authorization Directory

The procedure for creating these documents has not changed. The files will be created, revised, and stored as they have been in the past.

The Steps below describe the procedure for placing new or revised documents into ProjectWise.

1. Fill out, sign, and scan the document.
2. Open Windows Explorer and navigate to the folder containing the scan.
3. Rename the scan to the desired name. Below is the list of names used for the scans.

#####ROW_Memo.pdf	#####ROW_Legals.pdf
#####ROW_Cost_Estimate.pdf	#####ROW_Titlework_Ownership###.pdf
#####ROWPR.pdf	#####ROW_Boundary_Conflicts.pdf
#####ROW_Environmental.pdf	#####ROW_Land_Service_Facilities.pdf
#####ROW_Plans.pdf	#####ROW_Deposited.pdf

Note: the # symbols preceding the file name are replaced with the job code. Those following Ownership are replaced by the ownership number referred to in the document.

4. Open ProjectWise Explorer.
5. Expand the **CDOT_Active_Projects** datasource.
6. Navigate to **Documents > Projects >** *##000-##999* **> ### - ### >** *JPC# - Description* **> ROW_Survey > ROW_Plan_Authorization** or **Documents > Projects >** *##000-##999* **> ### - ### >** *JPC# - Description* **> ROW_Survey >Ownership > Title** for *#####ROW_Titlework_Ownership###.pdf*.

   **Note**: in the above path, *##000-##999* represents the folder with number range containing the first two digits of the JPC number. The *### - ###* represents the folder with number range containing the last three digits of the JPC number. The *JPC# - Description* represents the folder with complete JPC number and project description.
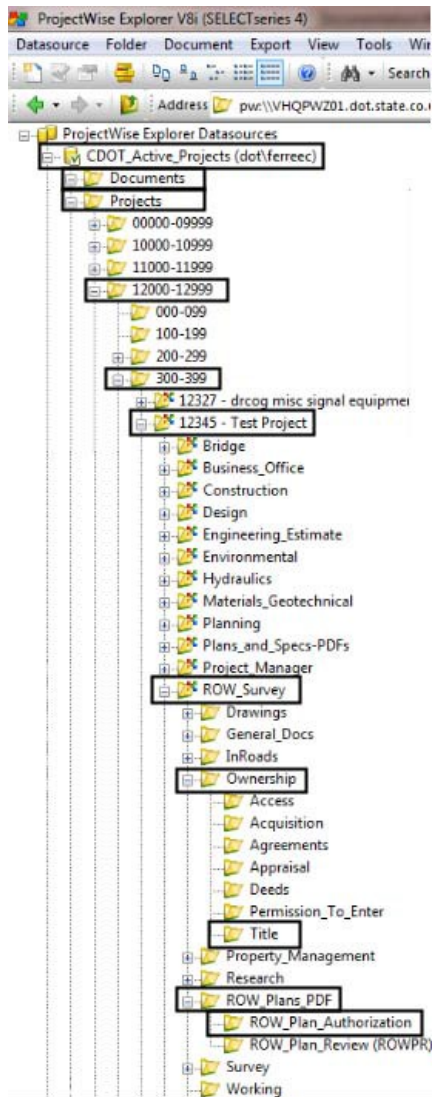
Note: If the project does not exist in ProjectWise, contact CADD Support at 303-757-9598 (7-9598)

7. From the Windows Explorer, drag the scan and drop it into the ProjectWise Explorer. This displays the *Select a Wizard* dialog box. The illustrations below show files being copied into the ROW_Plan_Authorization folder (top) and the Title folder (bottom).
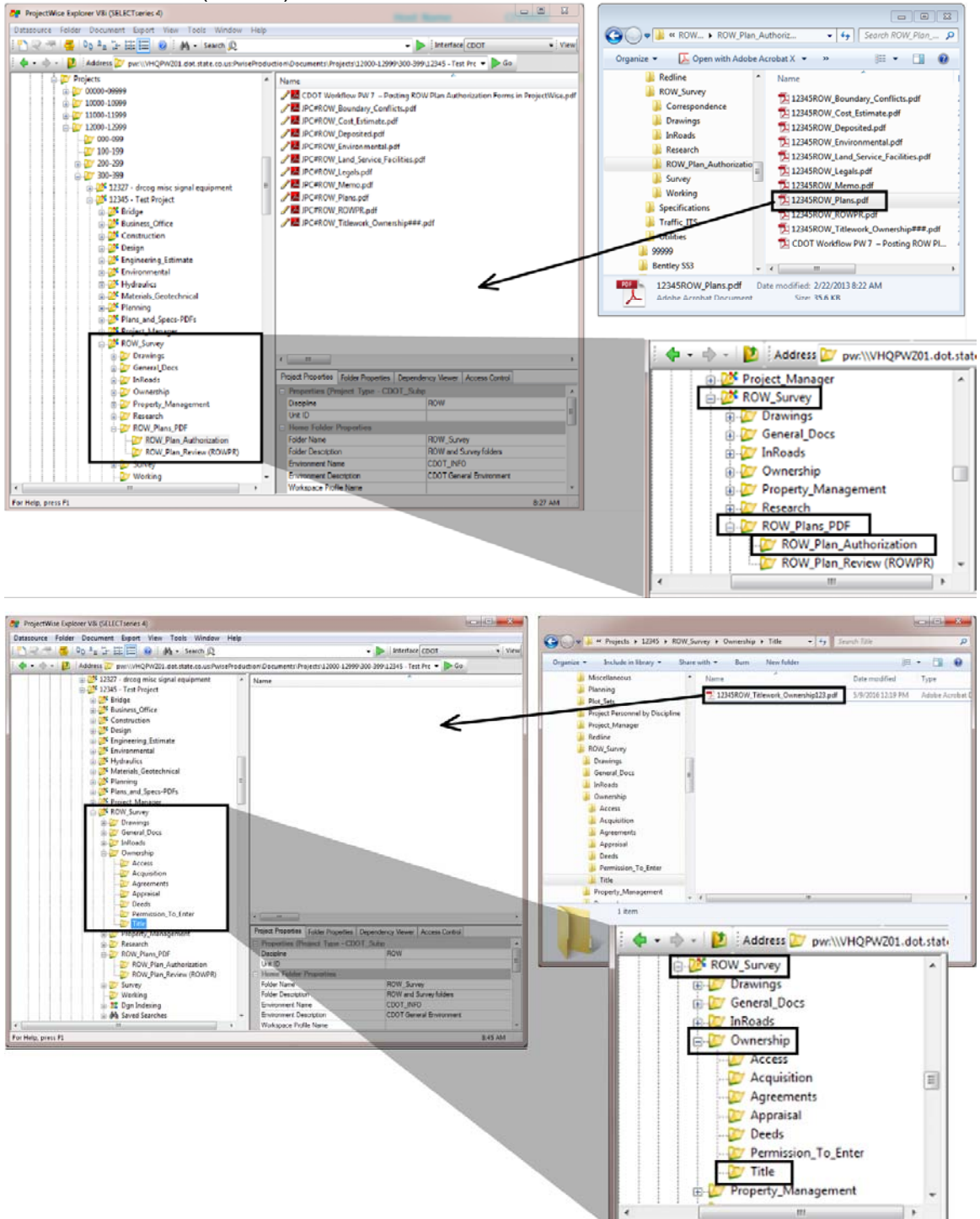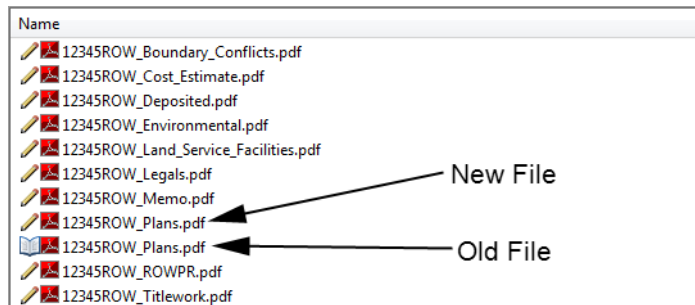
8. In the *Select a Wizard* dialog box, select the **No Wizard** icon then click on the **OK** button. This displays the *Select an Action* dialog box.
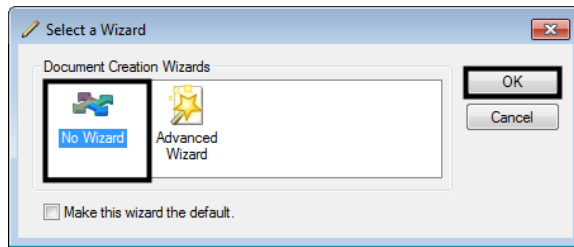
9. In the *Select an Action* dialog box, toggle on Create a new version of existing document.

10. Click on the **OK** button.
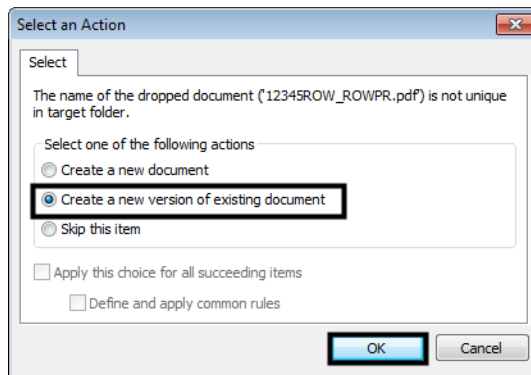
11. The new file will have the pencil icon next to it

The procedure for placing revised documents in ProjectWise is exactly the same as that described above. Each time a file with the same name is placed in the destination folder, a new version of the file is made. The new version is also the active version.

The ProjectWise Name, Description, and File Name

Each file in ProjectWise file has a *Name*, *Description*, and *File Name*.

- **Name** – Used to identify or describe the file's purpose. This field is limited to 127 characters.
- **Description** – Used to further describe the file. This field is limited to 127 characters
- **File Name** – The actual file name as would be seen in a Windows Explorer dialog box.

The CDOT standard is to use the file name in the Name field. This will reduce confusion about what a file is called when seen in the ProjectWise Explorer. By default, when a file is placed in ProjectWise by the method described above the *Name*, *Description*, and *File Name* are all set to the actual file name of the original document.
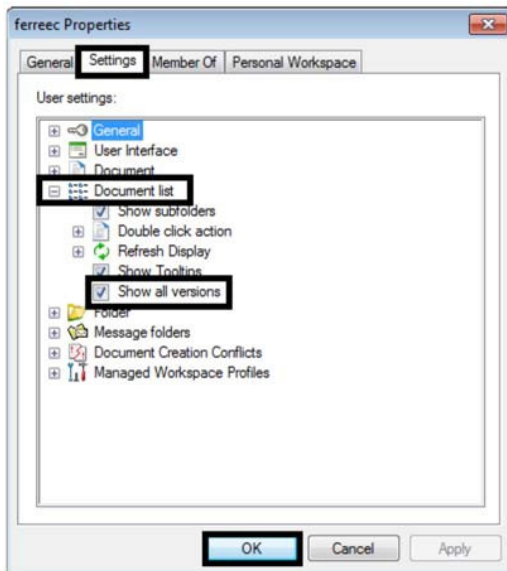
Showing Versions in ProjectWise

In order to determine if there are any versions of a document already stored in ProjectWise folder that is being viewed, the option to view versions must be turned on.

1. From the ProjectWise menu bar, select **Tools > Options**. This displays the *Properties* dialog box.
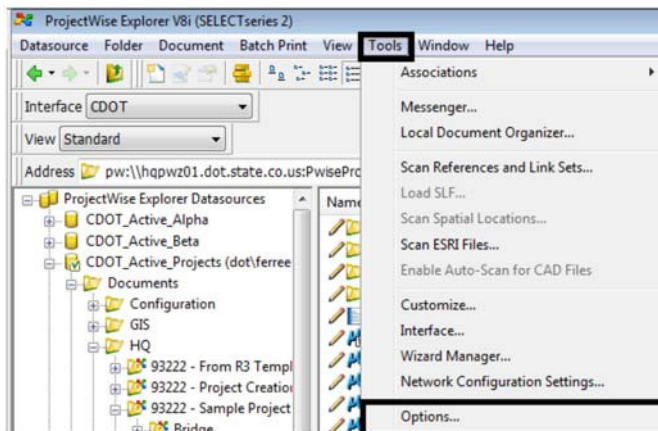
2. In the *Properties* dialog box, **<D>** on the **Settings** tab.

3. In the **Settings** tab, expand the **Document List**.

4. Toggle on **Show all versions**, then **<D> OK**. This displays the versions and dismisses the *Properties* dialog box.
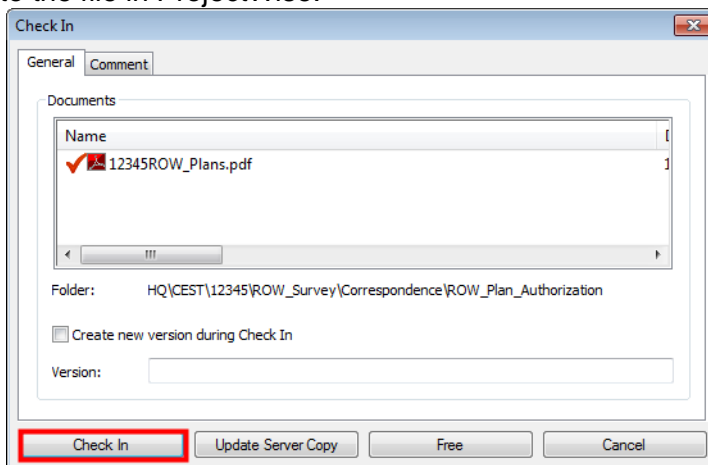

Opening a File in ProjectWise

To view the active ✏ version of a file:

1. **<D><D>** on the desired file. This opens the file.

When finished viewing the file, it can be closed.

2. If the file was modified (by using the comment or markup tools, for example), then the file should be saved.
3. Exit the file normally. Upon exiting the file the Check In dialog box is displayed.
4. If the document was modified, **<D>** the **Check In** button. This will write the changes back to the file in ProjectWise.

5. If the file was not modified then either **Check In** or **Free** can be selected.

There are a number of actions available when exiting a file stored in ProjectWise. These are:

- *Check In* – Update the file on ProjectWise and delete the local copy.

- *Check In Leave Copy* - Update the file on ProjectWise and keep the local copy.

- *Update Server Copy* - Update the file on ProjectWise and keep the local copy. This can be used while the file is still open.

- *Free* – Does not update the file on ProjectWise and deletes the local copy.

- *Free Leave Copy* - Does not update the file on ProjectWise and keeps the local copy.

To view an older version of a file:

1. **<D><D>** on the desired file. This displays a message window indicating that the file will be opened read only.
2. **<D>** the **OK** button on the message box and the file will open.
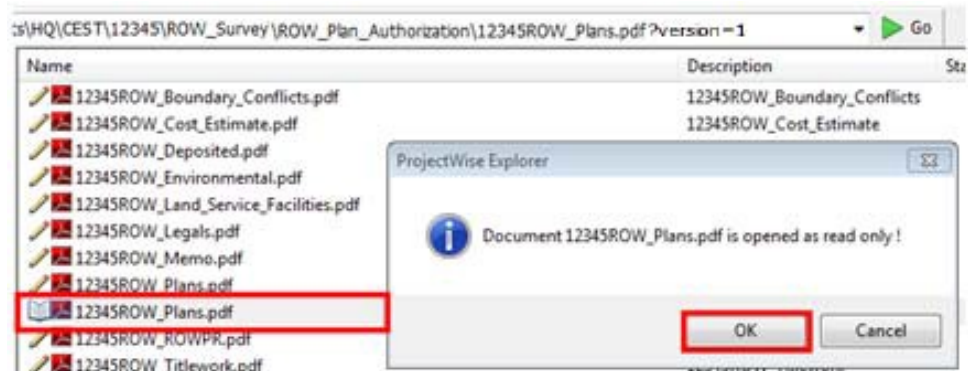
3. When done reading the file, close it as normal.