

Workflow OP 2 - Linking Excel Documents to MicroStation

This document guides you through linking Microsoft Office Documents within MicroStation.

Workflow Outline

Creating a New Link - To create a link to an Excel file within MicroStation; copy the data from the Excel file, then Paste Special the data into MicroStation.

- ◆ **Excel > Copy** - Used to identify the text to be linked.
- ◆ **MicroStation > Paste Special** - Used to create the new link in MicroStation.
 - **Method** - Use the By Size option.
 - **Scale** - Use 10 so that the text will be the correct size.

Updating Links to the Excel - If a linked document gets moved or renamed, the link to that file can be restored without re-creating the link.

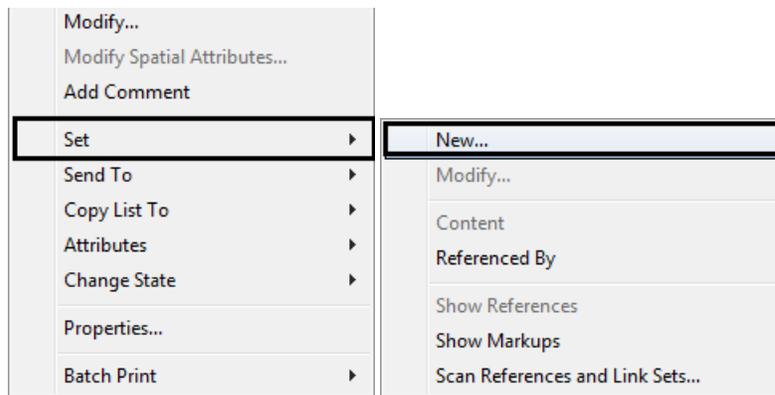
- ◆ **Commands Used: Edit > Links > Change Source** - Used to change the directory path to the linked Word document.

Preparing the Documents in ProjectWise

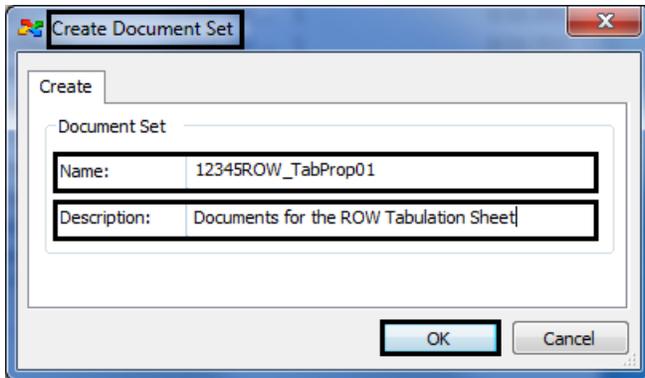
Linking a ProjectWise document to a MicroStation drawing allows you to change the document and have those changes automatically reflected in the MicroStation drawing. This is a two stage process. The first step is to create a logical set of documents called a **Document Set**. The second step is to use the set to link the documents with the MicroStation drawing.

Creating a Document Set

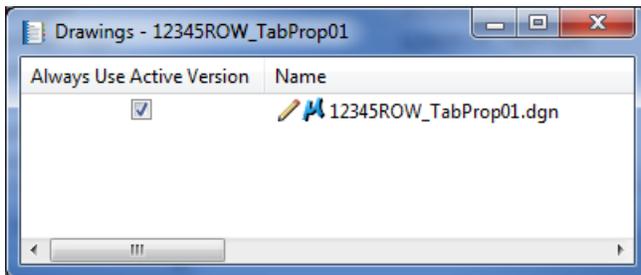
1. In the ProjectWise Explorer select the folder where the parent drawing is located. This will usually be the **Drawings** folder of the specialty group.
2. **Right-click** on the parent drawing file and select **Set > New** from the right click menu. This will display the **Create Document Set** dialog box.



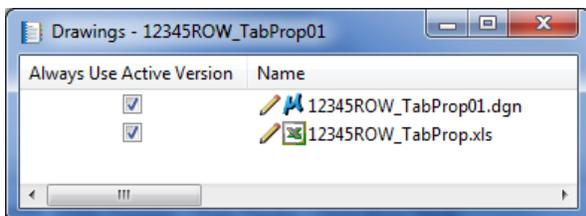
3. Enter a **Name:** and **Description:** for the new document set. Consider using the name of the MicroStation file as the **Name:** of the new document set. This will help with knowing which document set is associated with a drawing. Click **OK**.



The **Document Set** window will appear with the parent drawing listed in the window.



4. Next, **Drag and drop** any Excel or Word documents that will be referenced to the parent drawing into the document set window.



Note: Although documents can be added to the Document Set from any folder within the active ProjectWise datasource, ideally they would be added from folders within the same project.

5. Once all of the desired documents are added to the document set, close the document set window. The Document Set will appear in the ProjectWise Explorer window as indicated by the  icon. Notice how the document set has a Name but no FileName as shown below.

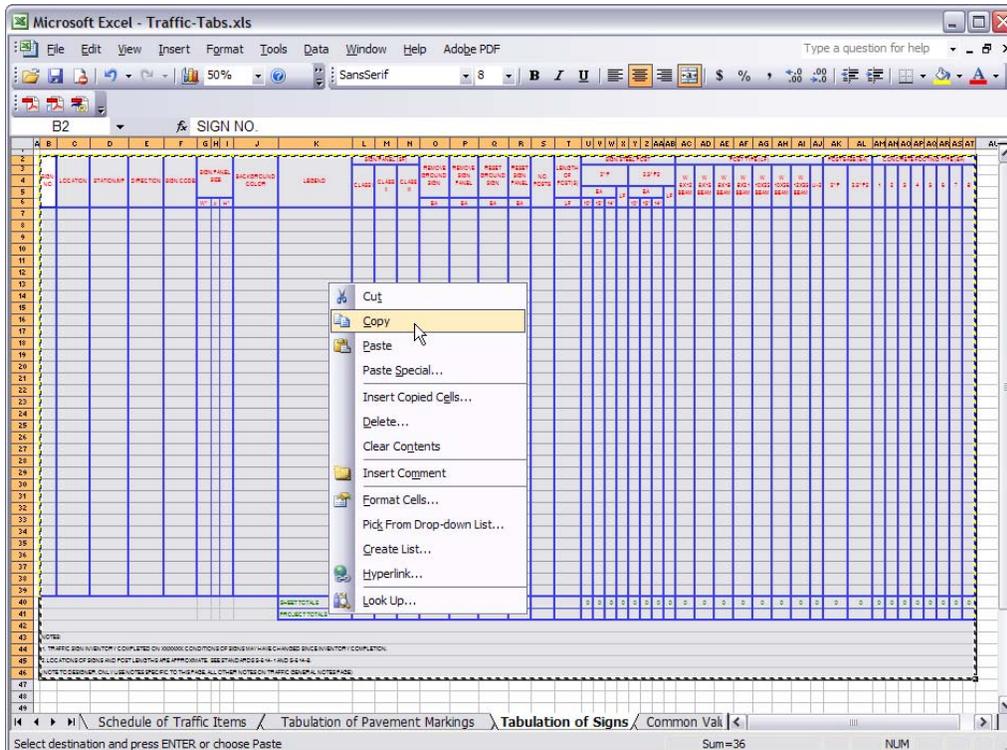
Name	File Name	Status	Out to
 Reference_Files			
 Tabs			
  12345ROW_Cnty-24x18_#.dgn	12345ROW_Cnty-24x18_#.dgn	Checked In	
  12345ROW_Cnty-24x36_#.dgn	12345ROW_Cnty-24x36_#.dgn	Checked In	
  12345ROW_Mon01.dgn	12345ROW_Mon01.dgn	Checked In	
  12345ROW_Mon02.dgn	12345ROW_Mon02.dgn	Checked In	
  12345ROW_Ownership#.dgn	12345ROW_Ownership#.dgn	Checked In	
  12345ROW_Plan#.dgn	12345ROW_Plan#.dgn	Checked In	
 12345ROW_TabProp01		Checked In	
  12345ROW_TabProp01.dgn	12345ROW_TabProp01.dgn	Checked In	
  12345ROW_TabProp02.dgn	12345ROW_TabProp02.dgn	Checked In	
  12345ROW_TabProp03.dgn	12345ROW_TabProp03.dgn	Checked In	
  12345ROW_TabProp04.dgn	12345ROW_TabProp04.dgn	Checked In	
  12345ROW_TabRAS#.dgn	12345ROW_TabRAS#.dgn	Checked In	
  12345ROW_TitleSht.dgn	12345ROW_TitleSht.dgn	Checked In	

Note: A document set is not a file and therefore cannot exist outside of ProjectWise.

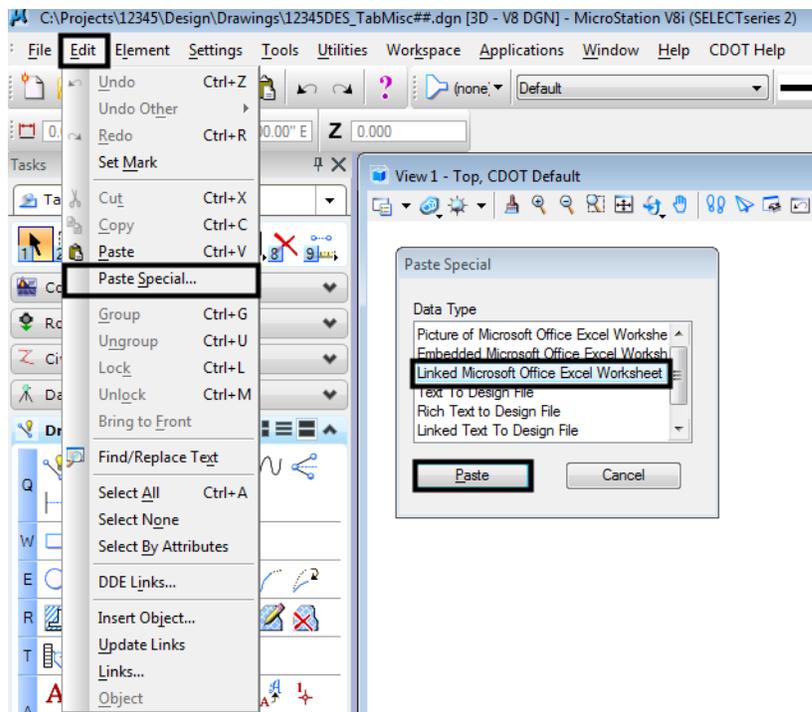
Using the document set, all files associated with the drawing file can be checked in/out together. It ensures that the correct files are being used in the linked document and are available to other team members when changes are made to the base files.

Linking Excel Documents

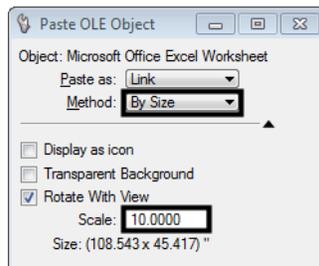
1. Open your MicroStation File and your Microsoft Excel file.
2. Within the Excel file, select the information you would like in the MicroStation Sheet file and copy by **right clicking** and selecting **Copy**.



3. Within the MicroStation file, select **Edit > Paste Special ...** from the MicroStation menu. On the **Paste Special** dialog box, <D> **Linked Microsoft Office Excel Worksheet** and <D> **Paste**.

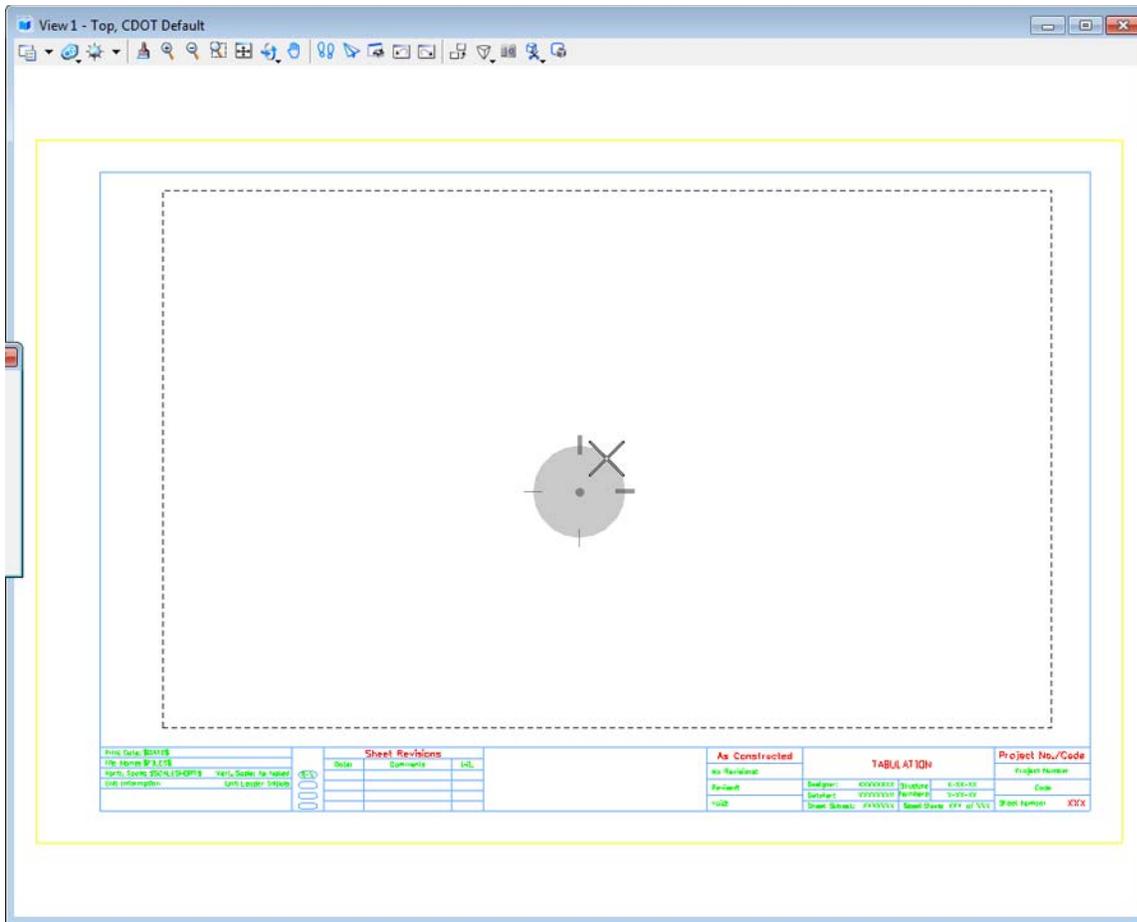


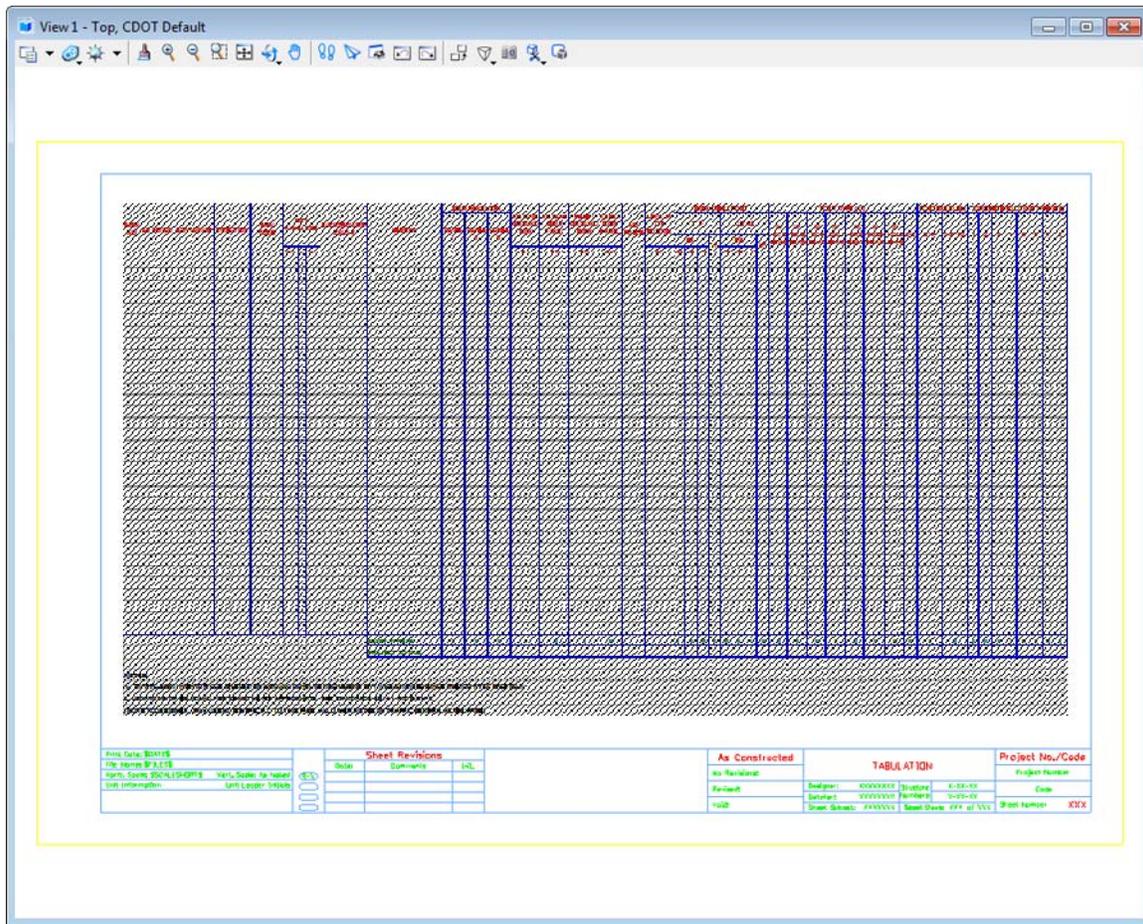
4. This brings up the **Paste OLE** dialog box. Select **By Size** as the **Method:** and enter a **Scale** of **10**.



Note: The Arial font with a 10 pt size should be used as the default Font in Microsoft Excel documents. This size is best for readability and reproductability.

- 5. The limits of the selected Excel data to be placed in the MicroStation Sheet will display in the MicroStation Window. Select the location for the Excel File and <D> to place the file.



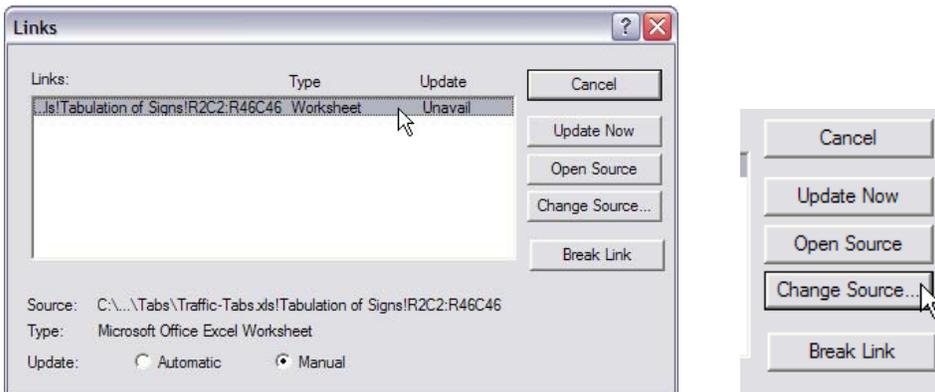


Note: The link will display with hatching which indicates that the Excel file containing the linked data is currently open. If you close out of your Excel file, the hatching will go away.

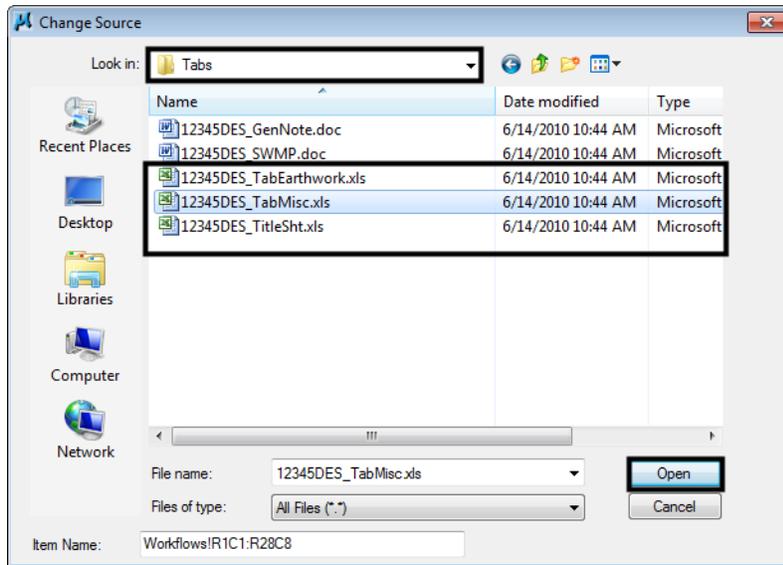
- From the **MicroStation** menu, select **Edit > Links...**



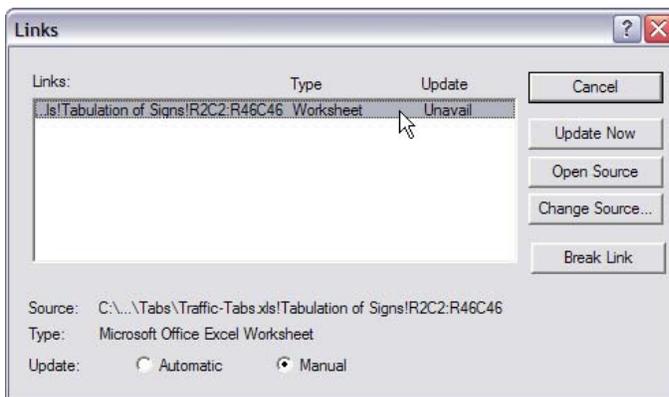
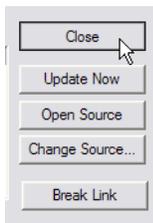
- This will bring up the **Links** dialog box. You can select an available document link and **<D> Change Source...**



- This brings up the **Change Source** dialog box. Use this to navigate to and select the file with its new location. <D> **Open**. This dismisses the **Change Source** dialog box and re-displays the **Links** dialog box.



- You can select another available document link to update or <D> **Close** to exit the **Update Links** dialog box.



Note: You can select either to have the link update manually or automatically by selecting the method you prefer. You can do a manual update from the **Links** dialog box by selecting the link and <D> **Update Now**.