Working with Documents in ProjectWise

Document Status and Type

Each document listed in the ProjectWise Explorer window will begin with two icons. The first icon identifies the ***Status*** of a document; the second icon identifies the document ***Type***.

The following table identifies the status icons and their meaning.

Status of Documents

Icon	Meaning
	Document is available for checkout
	Document is open for read access
	Document is checked out by another person
	You have this document checked out
	Document is exported
	Document is final

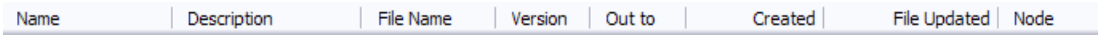
The following table identifies the more common document types and the application they are associated with.

Common Document Types

Icon	Document Type
	InRoads document
	MicroStation document
	MicroStation document with reference files attached
	Microsoft Word document
	Microsoft Excel document
	PDF document
	ProjectWise Document Set

Viewing and Editing Documents

One of the most important functions of ProjectWise is to provide users with document information at a glance. The columns of information that display in ProjectWise Explorer are controlled by the active ***View***. Currently there is only one view named ***Standard*** that is included with the CDOT installation of ProjectWise which displays the following information:

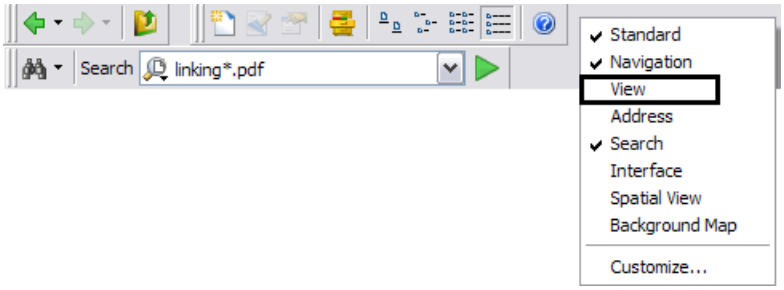


Although the Standard view only display a limited amount of information, you can customize additional views to display any information about a file so that you can see that information at a glance. This section will show you how to add customized views to ProjectWise.

View Toolbar

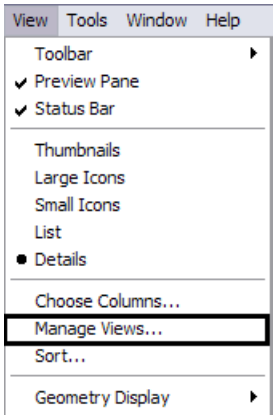
The easiest way to change a view is by using the view toolbar. The active view can be set using the View toolbar. When you create a customized view, it will be available through the pull-down in the View toolbar.

If this toolbar is not showing in the ProjectWise Explorer, simply right click in the toolbar area and click on **View** to display the toolbar.

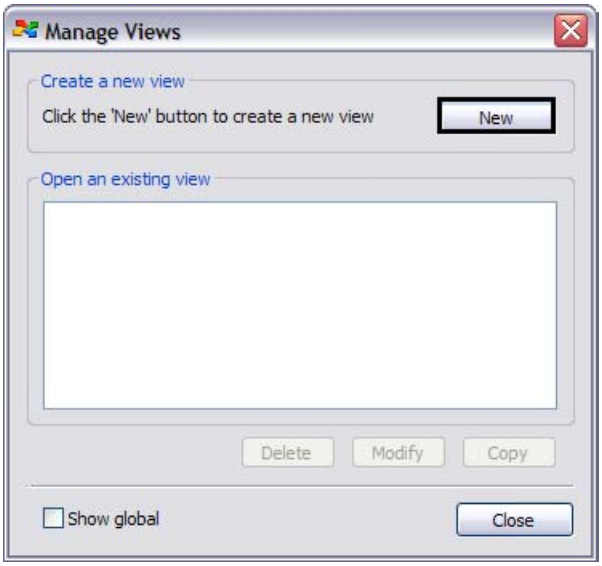


To create a customized view:

1. Click on **View > Manage Views...** from the pull down menu. the ***Manage Views*** dialog box will be displayed.



2. Click the **New** button to create a new view. This will display the ***Create View*** dialog box.

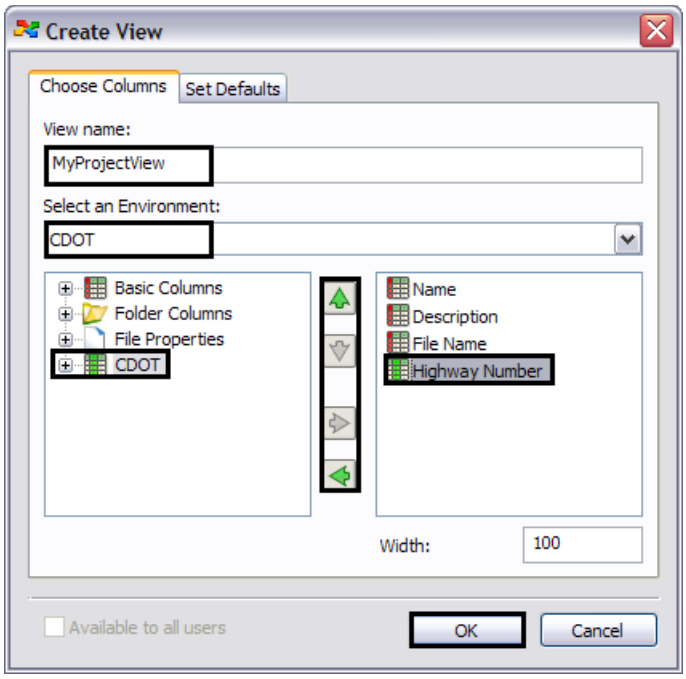


3. In the Create View dialog, type in a **Name** for the customized view and verify that ***Select an Environment:*** is set to **CDOT**.

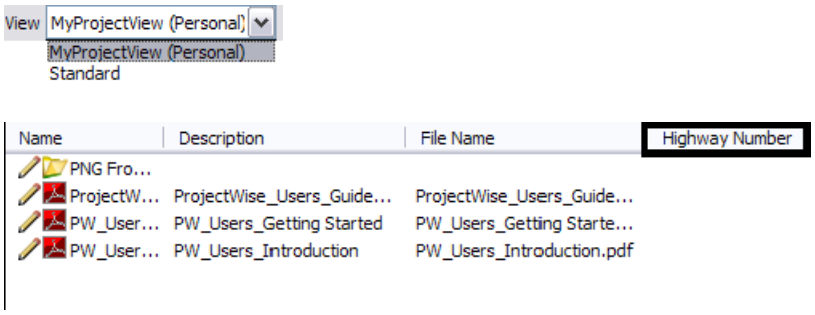
4. Choose columns of information from the left hand side of the dialog to add to the right hand side by double-clicking on the desired item. As and example, double-click on CDOT then double-click on Highway Number. This will add the property for Highway Number to the right hand side of the dialog box.

5. Adjust the order of the information by using the up and down arrows that appear in the middle of the dialog box.

6. When you have added all the columns you want to see in the explorer window, click the **OK** button.



7. Test the new view by choosing it from the View toolbar.

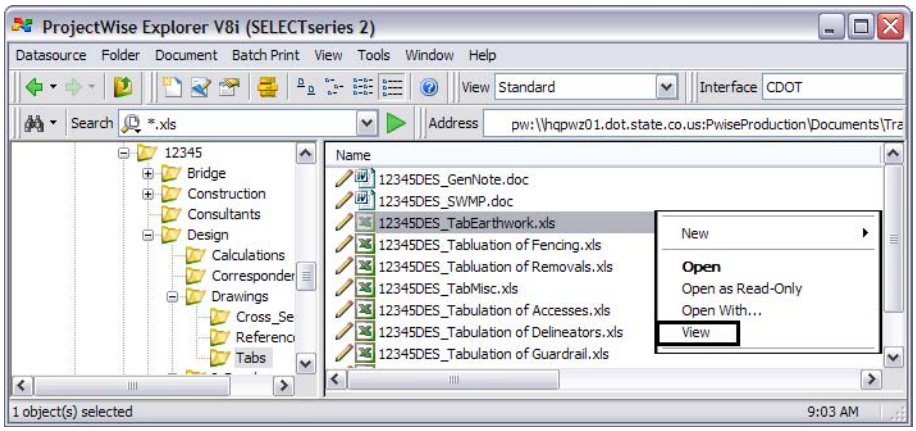


8. If you need to make any adjustment to the view, return to the Manage View dialog box, choose the view you want to modify and click on the **Modify** button. This will display the Create View dialog box where you can make any changes to the view.

   You can create as many customized views as you need.

Viewing a Document

You may want to look at the contents of a document using a separate viewer instead of opening it in its native application or checking out the document. To view a document right-click on a document and click on **View**. This will open the document in the associated viewer application. Often, the associated viewer is the same as the documents native application.



Note: The first time View is chosen, there will be a slight delay while the document viewers are loaded.

As a side note, an audit trail is not created when the View option is used to review the contents of a document. The audit trail feature will be covered later on in this chapter.

Opening a Document Read-Only

To view a document using its associated software without fear of modifying the document open the document as read-only. The video **Viewing and Opening Documents** illustrates the how to open a document as view only. The video also explains how to open a document if it isn't associated with a software application by using the Open With... command.

When you Open as Read-Only, you do not check-out the document. See the section on Check-Out and Check-In for more information on checking out and checking in a document.

Editing Documents

ProjectWise uses a Check-Out and Check-In process as the way to make sure that only one person at a time is modifying project documents. If a project document is allowed to be edited by more than one person at a time, there is a high probability that some modifications will be lost along the way.

Checking Out Document

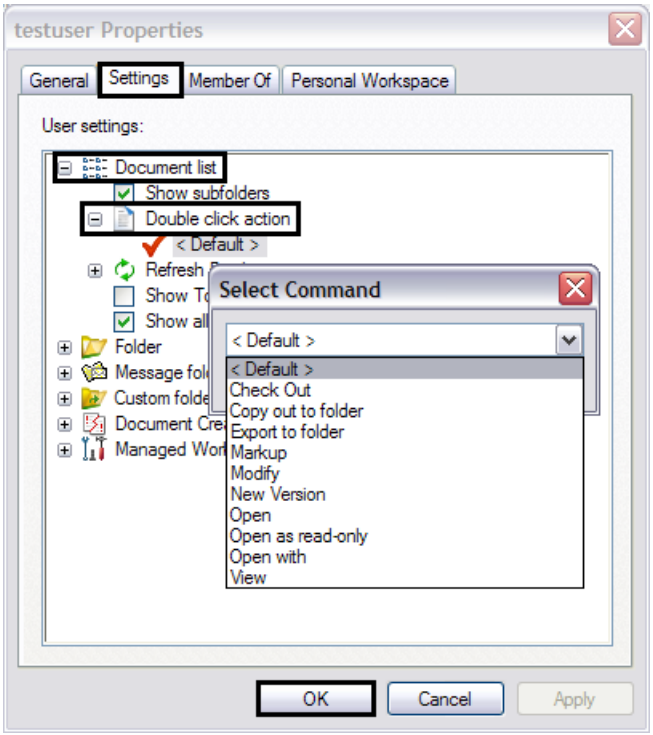
The video **Checking In and Checking Out Documents** illustrates the different methods that are available to open a document for editing. The following table summarizes these methods.

Options for Editing Documents

Double-Click on a Document	Check-Out the document and open the document with the associated software for revisions
Open	Check-Out the document and open the document with the associated software for revisions
Open With	Check-Out the document and open the document with software you specify
Check Out	Check-Out the document but do not open the document with the integrated software

Note: The double-click action is a user preference. The default action for double-click is to check out a document. You can set the double-click action using the following steps:

1. From the ***Tools*** menu select **Options**.
2. Click on the **Settings** tab.
3. Expand the folders for ***Document list*** and ***Double click action***.
4. Double click on < Default > to open the ***Select Command*** dialog box.
5. Select the desired action from the Select Command pull down list.
6. Press **OK** to exit the Select Command pull down list and again to exit user Properties.

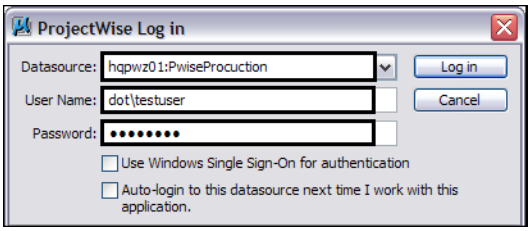


Document Check Out Using Integrated Software

The following procedure is used when connecting to ProjectWise from outside the CDOT network and MicroStation integration with ProjectWise is turned on.

1. Start MicroStation. This will display the ProjectWise Log in screen.

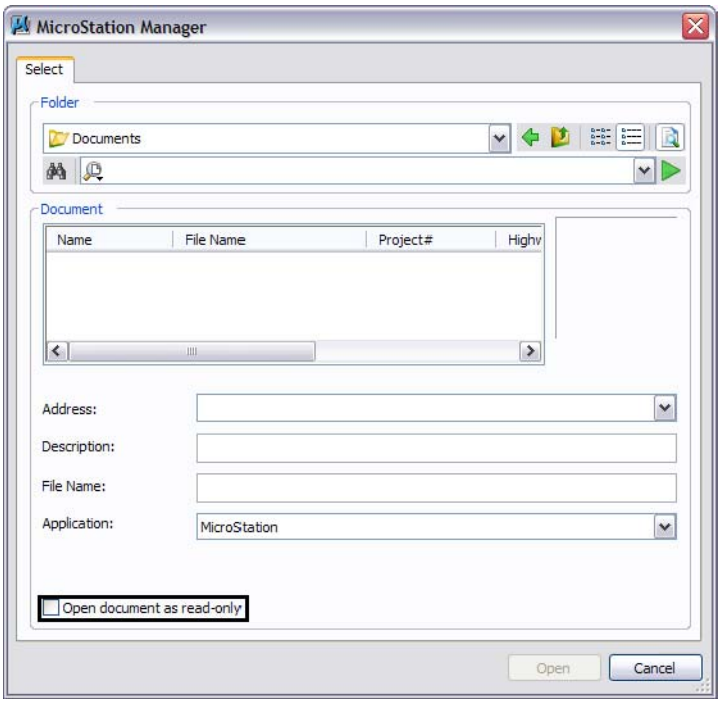
2. Type in the ***Datasource*** name, your CDOT ***User Name*** preceded by the "dot\", and your ***Password***. Click the **Log in** button.This will open the standard MicroStation Manager window.



   Currently the pull-down for the Datasource: field does not list the datasources. Therefore, you must type the datasource name in manually. The available CDOT datasource are:

   - hqpwz01:PwiseProduction
   - hqpwz01:ROWProd
   - hqpwz01:ConstArchiveProd
   - hqpwz01:TREXProd

3. Select the folder and the document you wish to open. Verify the ***Open document as read-only*** is toggled **Off**, and click the **Open** button.



The document will be checked out in ProjectWise and the integrated software will open the document for revisions.

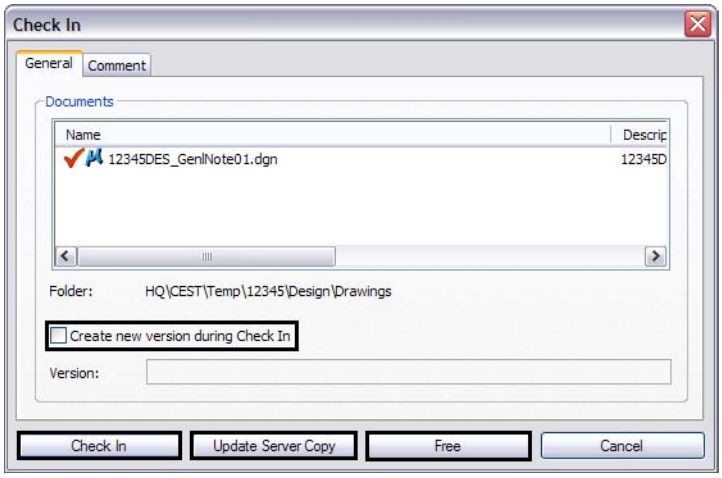
Checking In a Document

There are a number of options that are available when checking a document back into ProjectWise. They are: Check In, Update Server Copy, and Free.

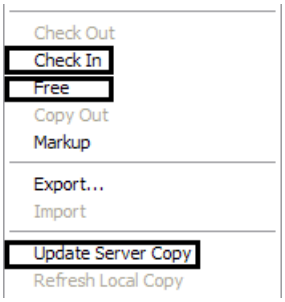
The first two options retain any changes made to the document while it was checked out; the third option releases the document and discards any changes made.

Note: The video **Local Document Organizer** explains the detail for each of these check in options.

When you close a document, the ***Check In*** dialog box appears. You will see the **Check In**, **Update Server Copy**, and **Free** options at the bottom of the dialog box. When you click on one of the options, that action is performed. You can also create a new version of the document at this time by checking the Create new version during Check In toggle.



Note: Sometimes the Check In dialog box doesn't appear. In this case and for any files that are only checked out and not opened in an application, you can right click on the document to access these same check in options.



Creating/Deleting Documents

There are a number of methods you can use to create or place documents in the project folders. The video **Create, Copy, and Delete Documents** demonstrates a few of these options along with how to delete document.

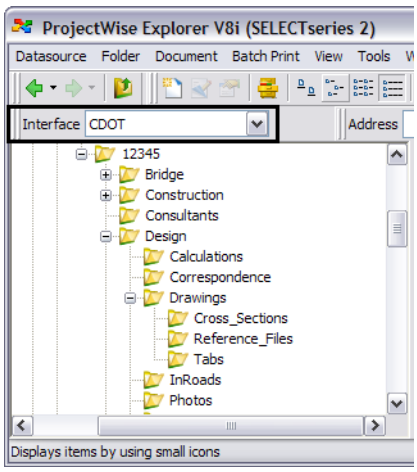
Important! After creating or making a copying a document, be sure to populate the document attribute with the correct data. The video **Document Properties** illustrates how to add/change document attributes.

Note: It is a common mistake to try and use the ***New>Document*** command from the ProjectWise ***Document*** pull-down menu. ***Do not use this method***. All this will do is create a place holder for a future file and does not actually create a file that can be used by an application.

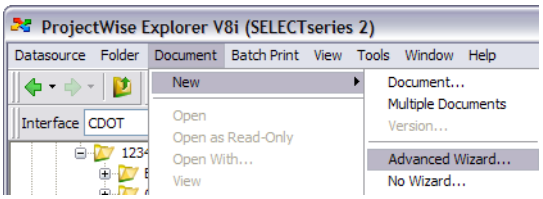
Advanced Document Creation Wizard

You can also create a new document using the ***Advanced Document Creation Wizard***. This wizard is also an effective way to create a document in ProjectWise. In addition to selecting a seed file, the Wizard allows you to use CDOT data to automatically create the file name and populate document attributes with project specific data. So, although the Wizard takes a little more time than the copy or drag and drop method, the user won't have to go back and add document attributes later on.

Before using the Advanced Document Creation Wizard, make sure the ProjectWise Interface is set to CDOT

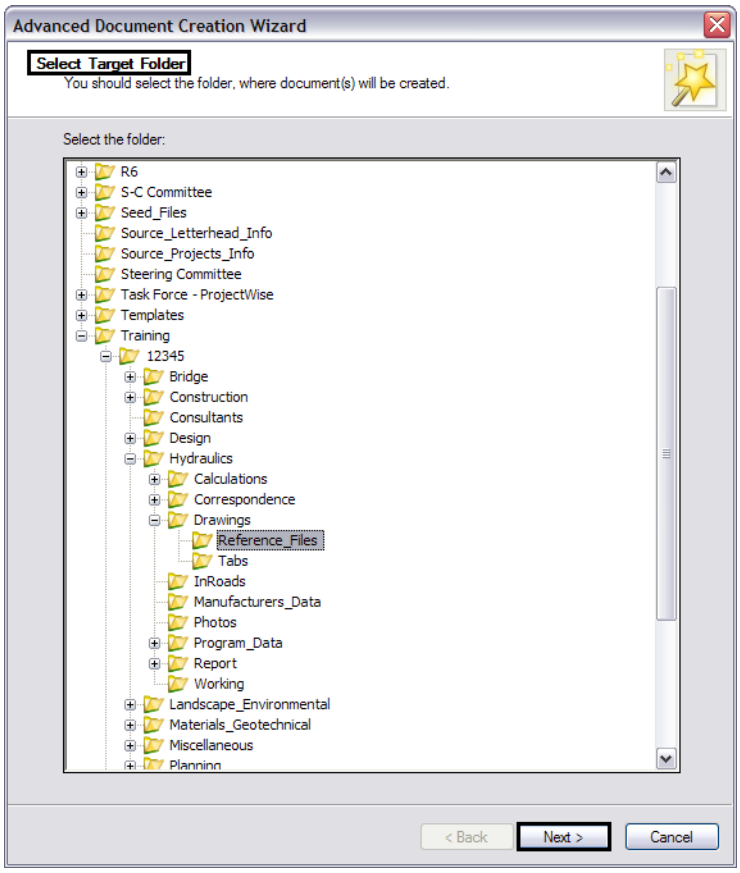


1. To use the ***Advanced Document Creation Wizard***, select the ***Document*** pull down menu then click **New > Advanced Wizard**.



2. On the ***Welcome to the Advanced Document Creation Wizard*** screen click **Next** button.

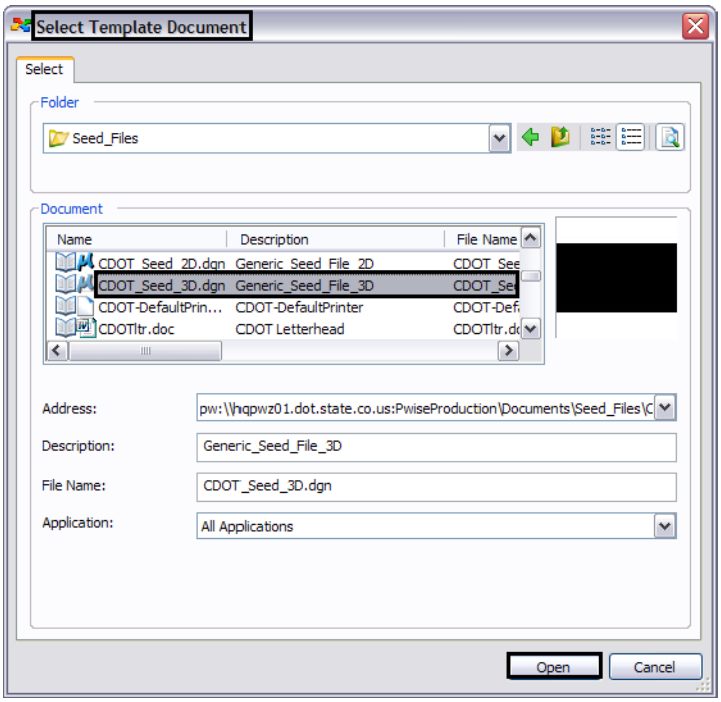
3. In the Select Target Folder screen, navigate to the folder where you want the new document to be created and then click **Next** button. This will open the ***Select a Template*** screen.



4. Click on the **Select** or **Browse** button to choose a template file depending if the template file is internal to ProjectWise document or an external file respectively. The ***Select Template Document*** dialog will appear

5. Navigate to the folder where the template file resides and select the file then click the **Open** button. This example will use the file ***CDOT_Seed_3D.dgn*** located in the Seed_Files folder of ProjectWise.

The seed file can be any document type including drawings, text files, spreadsheets, etc. There are several seed files to choose from in the ***Seed Files*** folder of ProjectWise.



6. In the ***Select a Template*** screen click the **Next** button. This will open the ***Define Document Code*** screen.

   Each field in the ***Define Document Code*** screen are document attributes. These attributes can be used to query project data, fill in MicroStation title block data, and to help define the filename. The required fields are:

   - ***Key Project Code -*** the 5 digit Project Code number for the project as listed in SAP
   - ***Key Discipline -*** the specialty group or functional area that is responsible for the document
   - ***Key Sequence Number -***

7. Key in your **Project Code** number for the Key Project Code field. Verify the project number by clicking on the down arrow on the fight side of the field.

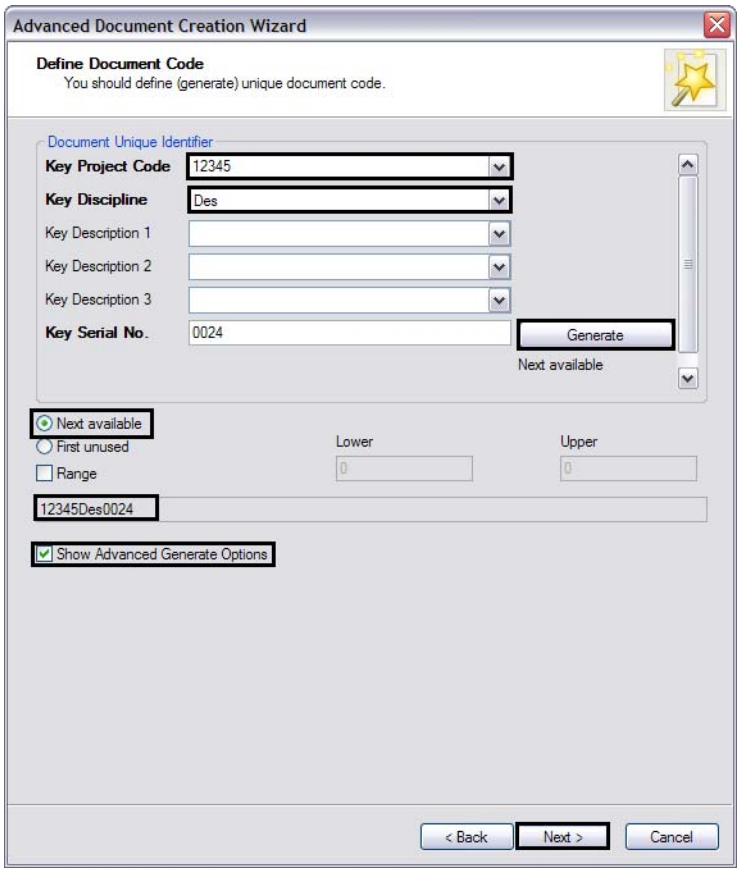
8. Use the down arrow in the Key Discipline field to choose the appropriate specialty group or functional area.

9. Toggle on the **Show Advanced Generate Options** at the bottom of the screen and then select the **Next Available** option.

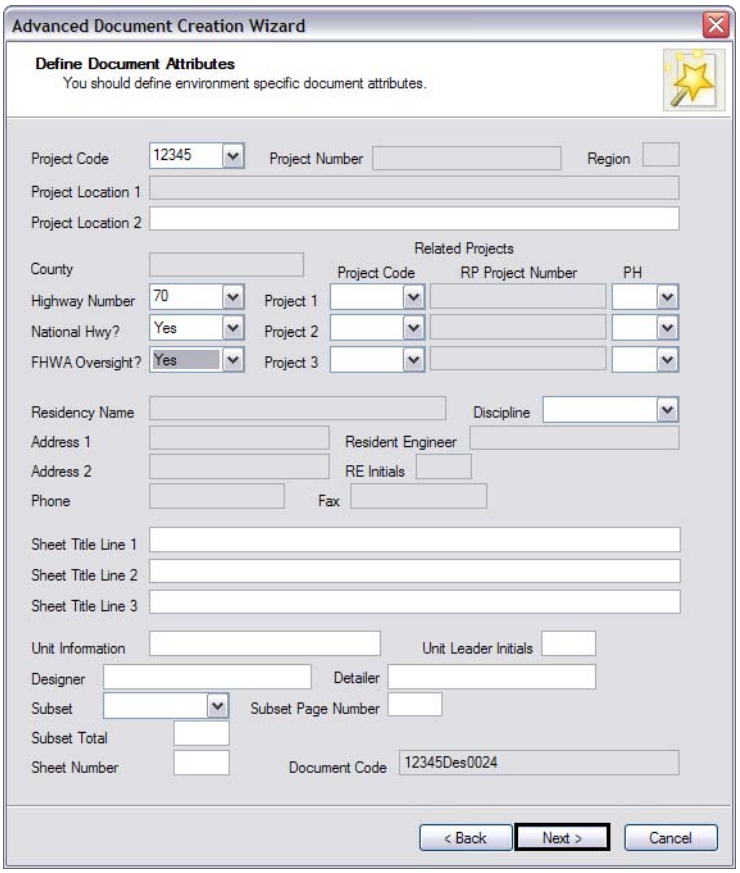
10. Click on the **Generate** button to the right of the ***Key Serial No.*** field to generate a unique document number.

11. The greyed out field above the Show Advanced Generate Options will generate a preview of the document name.

12. The resulting filename for this example is 12345Des0024. Click the **Next** button. This will display the ***Define Document Attributes*** screen.

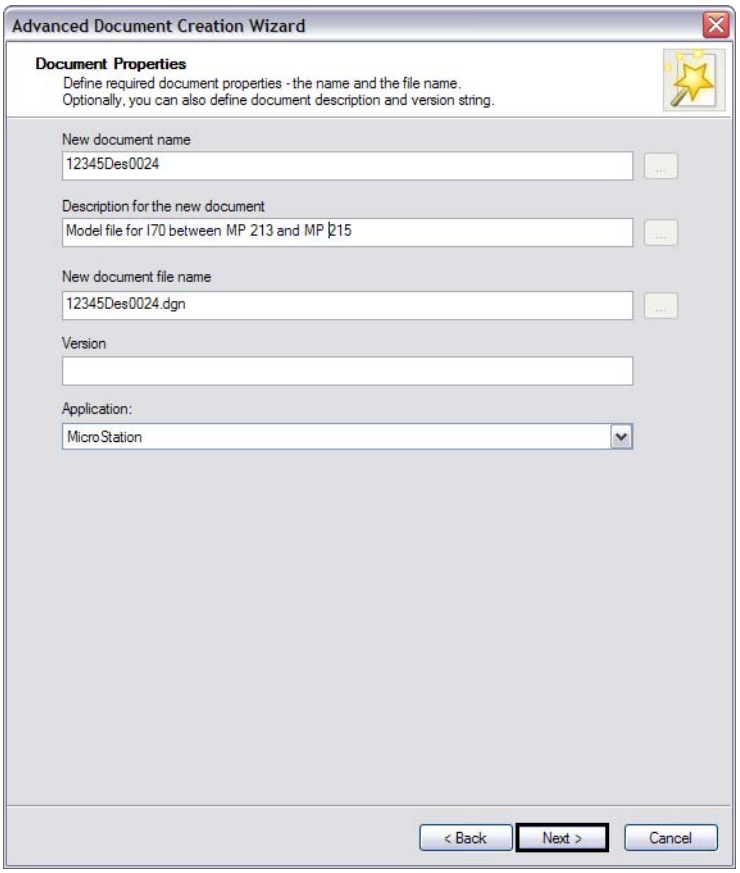


13. In the Define Document Attributes screen you can enter custom document attributes as defined in the CDOT environment. Fill in any relative known attributes and select the **Next** button. The ***Define Secondary Document Attributes*** screen will appear.

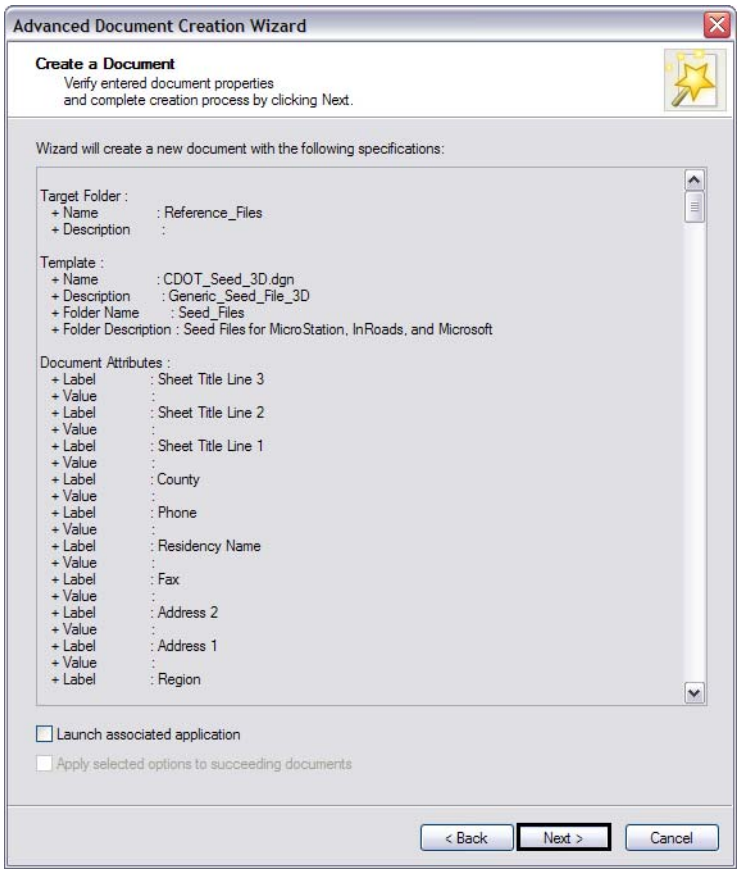


14. In the ***Define Secondary Document*** screen you can enter additional custom document attributes. Select the **Next** button. The ***Document Properties*** screen will appear.

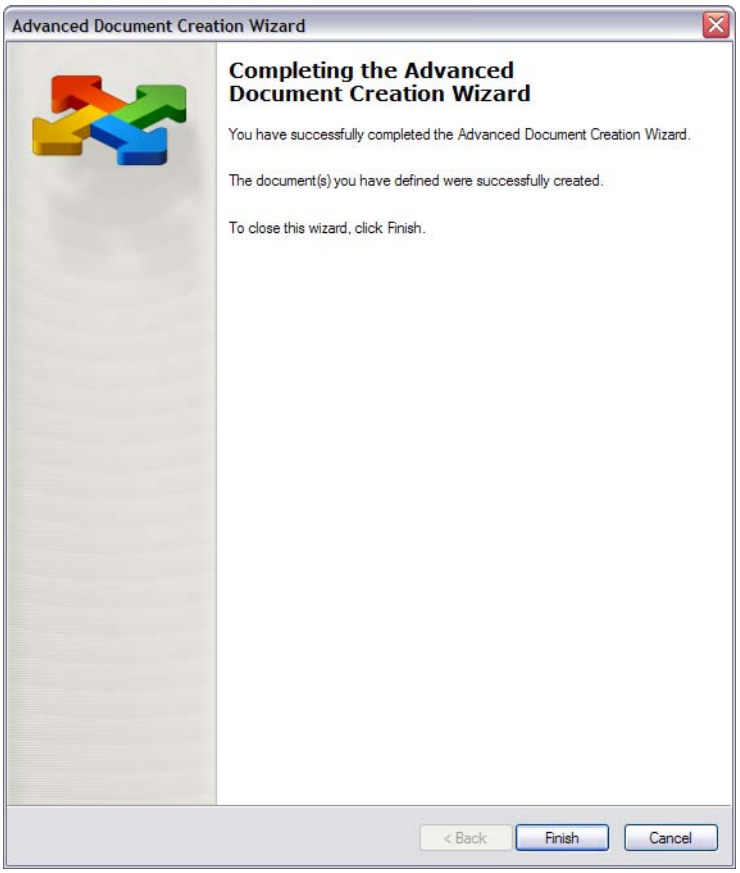
15. In the ***Document Properties*** screen you can define the document name, description and file name. Please note that the document name and file name are separate attributes. Select the **Next** button to continue. The ***Create a Document*** screen will appear.



16. In the ***Create a Document*** screen you can review all the data that has been entered for the new file. If you want to make any changes, click the **Back** button. Otherwise, click the **Next** button to create the new document.



17. This final screen shows whether the creation of the new file was successful or not. Click on the **Finish** button to complete the Wizard. Open the destination folder for the new document to verify it was created.



Deleting Documents

Important! Deleting a document in ProjectWise is a permanent action. You cannot "undelete" a document once it is deleted. If the document is older that a couple of days, there is a possibility that a backup copy exists. In order to retrieve a backup copy, contact the CDOT Help Desk and request the file to be restored.

The video **Create, Copy, and Delete Documents** illustrates the steps to delete a document.

Moving/Copying Documents

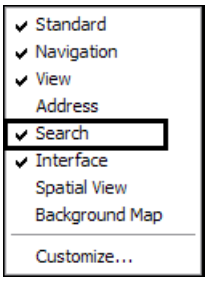
See the video **Create, Copy, and Delete Documents.**

Searching for Documents

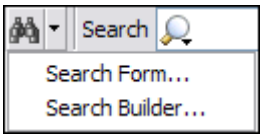
Since ProjectWise is database driven, not only can you search for document based on standard document properties but you can also search for documents based on project specific attributes such as project code.

There are three search methods available in ProjectWise, two advanced searches ***Search by Form*** and ***Define Search***, and a ***Quick Search***. The easiest way to access all of these methods is from the Search Toolbar.

If you cannot see this toolbar in the ProjectWise Explorer window, right click in the toolbar area of the window and select Search.



Both of the advanced search methods are accessed using the icon. Clicking the down arrow will display the advanced search options.



Search Builder

This method of searching for files functions similar to programming. Details on using this method are not covered in this document. Use the ProjectWise Help system for more information on this tool.

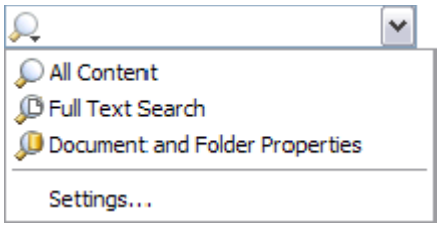
Search Form

This method of searching for files uses a more intuitive interface that displays document properties in a form layout. This method of searching is covered in the video **Finding Documents Quickly**.

Quick Search

This method of searching is new since the creation of the video noted above. Quick is can be found to the right of the advanced search icon in the Search toolbar. There are three modes to Quick Search; ***All Content***, ***Full Text Search***, and ***Document and Folder Properties***. See ProjectWise Explorer Help for a detailed description and function of each of these modes.

You can set the preferred Quick Search mode by clicking on the Quick Search Settings icon in the left hand part of the Quick Search window.



To perform a Quick Search:

1. Click on a folder from which to perform the search. Quick Search will search this folder and all sub-folders.

   Note: This is a default setting and can be changes by using the ***Settings...*** option in the Quick Search Setting pull down menu.

2. Type in the information you want to search for based on the mode that is selected.

   Note: The wildcard character (*) cannot be used if you are using the Full Text Search mode.

Press the **Go** button or **Enter** key.

For additional important information on searching in ProjectWise, see the topic ***General Notes About Searches*** in ProjectWise Explorer Help. This topic can be found under the Contents tab and then opening the folders ***Using ProjectWise Explorer*** and then ***Finding Documents, Folders, and Projects***.

Saved Searches

As noted in the chapter *Working with Folders in ProjectWise*, every datasource has a folder to store saved searches. The steps for creating a saved search are also illustrated in the video **Finding Documents Quickly**.

Local Document Organizer

The ***Local Document Organizer*** is a tool in ProjectWise that shows the documents that you currently have checked out, exported, and copied. Based on the status of a document, you can then use the Local Document Organizer to check-in, check-out, free, or update a server copy of the document. The following video illustrates how to use this tool.

Local Document Organizer