Working with Folders in ProjectWise

Setting Up a CDOT Project in ProjectWise

Creating a New Project

New project musts be setup in ProjectWise by the ProjectWise Administrator. This will ensure that the storage location, initial access privileges, and folder structure follow current CDOT standards. The ProjectWise Administrator will setup the project once it available in SAP or upon request for special projects that are not entered into SAP. The Project Manger is responsible for checking ProjectWise to see if the project has been setup and to contact the ProjectWise Administrator to 1) setup the project if it doesn't exist in ProjectWise or 2) to make changes to the initial folder structure or change access privileges.

Importing Files From an Existing Project

If you have a project that has been created outside of the ProjectWise environment, follow the steps below to import your project files from a local or network drive.

1. Verify the project is setup in ProjectWise

2. Drag and drop files from the local/network folder to the corresponding folder in ProjecWise.

   At this point MicroStation files imported into ProjectWise will be indicated by the icon ![v8]. This icon indicates that there are no reference files associated with the file.

3. Use the *Scan Reference and Link Sets Wizard* to re-establish the link between MicroStation master and reference files.

   The *Scan Reference and Link Sets Wizard* automatically scans MicroStation and AutoCAD master files for reference file attachments and creates a link between those documents. This utility is typically used after importing files into ProjectWise that have existing reference file attachments.

   Watch the video **Attaching Reference Files** for detailed steps on how to use this wizard.

   After the *Scan Reference and Link Sets Wizard* is finished, MicroStation files with references will now be indicated by the icon ![v8].

Folder Types

ProjectWise folders are different from Windows folders in that there is more than one type of folder in ProjectWise and the ProjectWise folders have more properties than a Windows folder.

Although the ProjectWise Explorer looks and feels much like the Windows Explore there are a couple of important differences to be aware of. First, ProjectWise has more than one type of folder. Second, you can access many more folder properties with a ProjectWise folder than with a Windows folder.

Included in every CDOT datasource are the following types of folders:

♦ folders used to store project data including sub-folders and documents ![folder]

♦ custom folders used to create links to frequently used folders and documents ![folder]

♦   folders to store saved searches 🔍, and

♦   folders to store internal ProjectWise messages 📁.

These four folder types are shown for each CDOT datasource in the image below.

Note: CDOT does not currently use the Components folder. Therefore, its function and use will not be covered in this user's guide at this time.
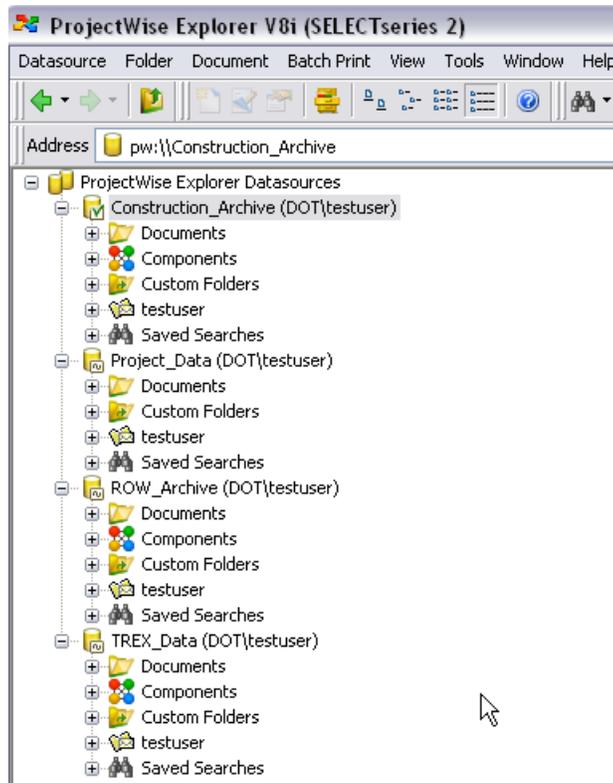

Important!   No matter what datasource you are working in, all data files will be stored in the ***Datasource*****Documents** folder.

Each type of folder is indicated by a unique icon. A list of the icons and their descriptions is shown below.

Icon	Description
🟡	ProjectWise Datasource – not logged in
🟡	ProjectWise Datasource – logged in
📁	Parent or Sub-folders
📁	Custom Folder
📁	Message folder
🔍	Search folder

Project Folder Structure in ProjectWise

Each CDOT datasource contains a Documents folder. This is the folder where all project data is stored. The Documents folder within the Project_Data datasource is organized into subfolders for each CDOT region, Headquarters (HQ), GIS, and a few other specialized folders as shown below.
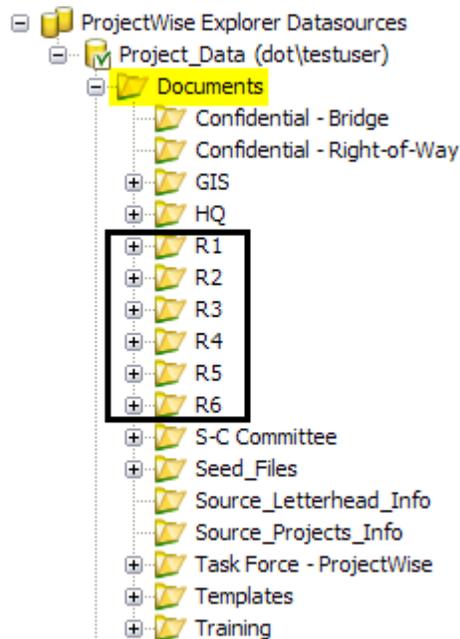

The next folder under each region is the project folder and usually contains the job project code number as a prefix to the folder name.
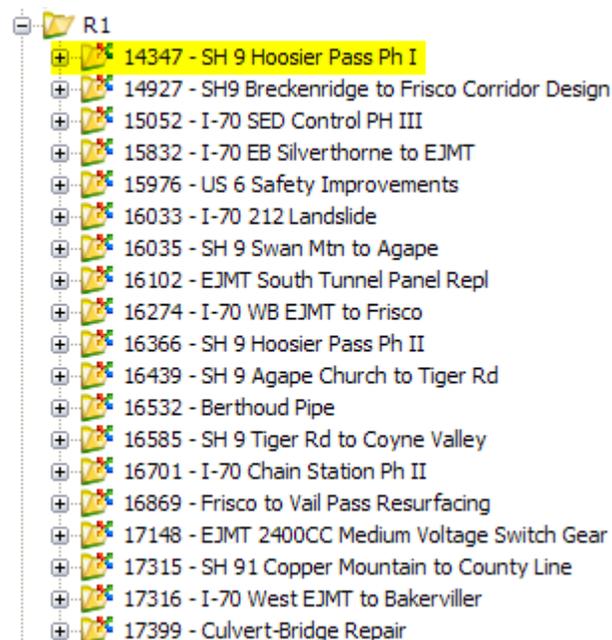
The project folder is divided into folders for each specialty group. Organizing the project by specialty groups allows for more control over permissions and access to the sub-folders and documents. The project folder structure is set by the ProjectWise administrator down to this level.

The sub-folders for each specialty group are used to store different types of information, such as drawings, design calculations, correspondence, photos, etc. and more. It is at the sub-folder level of the specialty group that the project manager or team members can modify the folder structure to fit the needs of the project. The following is an example of the project folder structure.
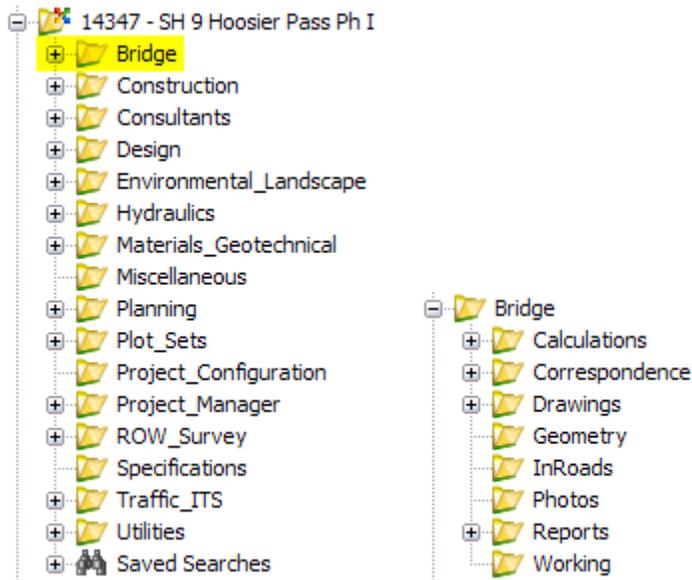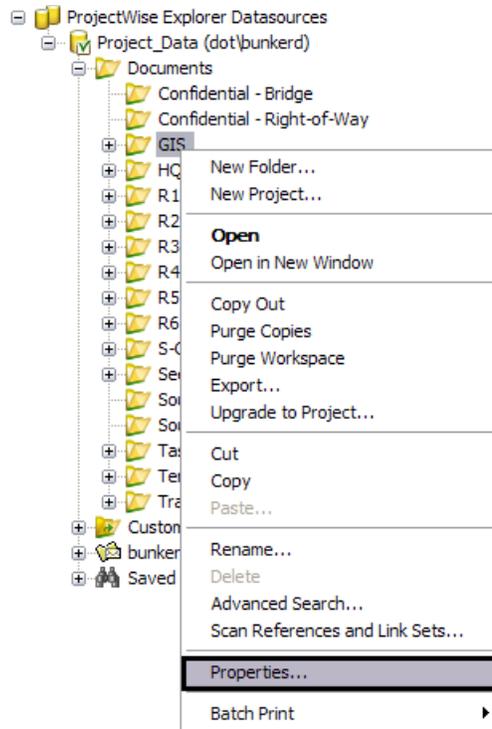
Folder Properties

As mentioned above, there are many properties associated with a folder in ProjecWise. When you select a folder, many of these properties (such as the folder name, owner, and usage of disk space) are shown in the lower right pane of the ProjectWise Explorer window as illustrated below.
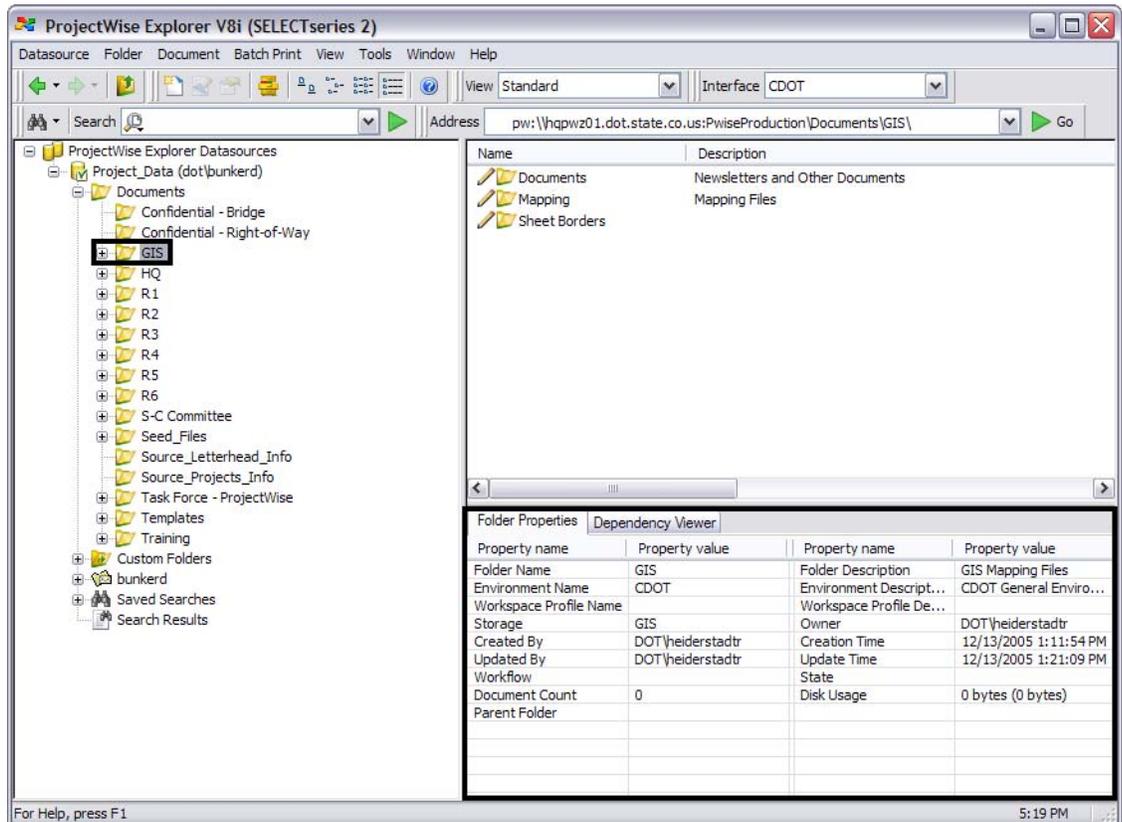
You can access additional folder properties by right clicking on a folder and then selecting *Properties…* from the pop-up menu as shown below.

The *Folder Properties* dialog box will be displayed. Although there are eight different tabs in the Folder Properties dialog box, the ones of most interest and those that will be covered in this document are:

- ♦ *Project\Folder Security*
- ♦ *Document Security*
- ♦ *Audit Trail*

Note: CDOT is currently working on the development of standards for two other tabs, *Workspaces*, and *Workflows/States*. As the development of these items are completed and implemented at CDOT, descriptions for and standard usage of these items will be included in this manual.
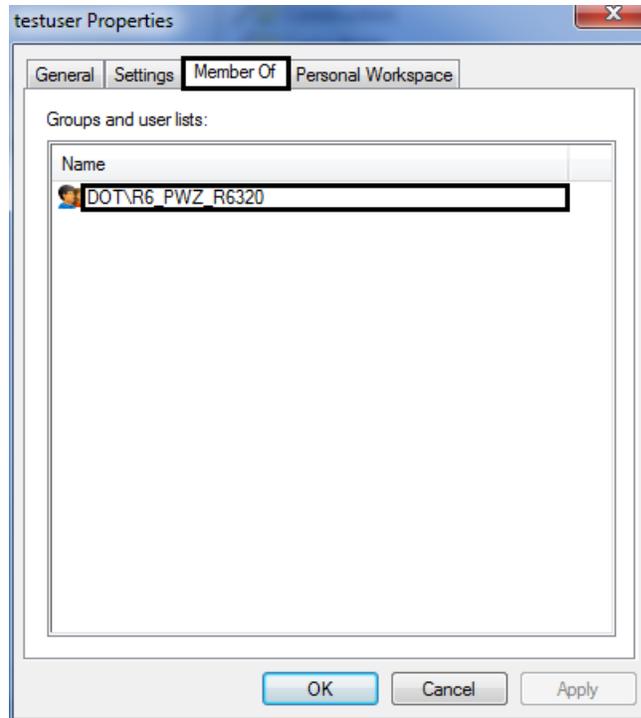
Permissions

Permissions to access folders and documents in ProjectWise are set separately through the *Project\Folder* and *Document Security* tabs respectively. In order to access a document, a user must first be granted a minimum of *View* permissions to the folder in which the document resides.

Permissions to folders and documents can be granted for 1) a specific user, 2) a user list, or 3) a user group. Granting permissions using groups is the preferred method. Granting specific user permissions should only be used in limited number of cases. Initial permissions will be setup by the ProjectWise administrator when the project is created.

Groups

Each employee at CDOT is assigned to a working unit called a ***Cost Center***. These cost center units are used to setup groups in ProjectWise. As employees come and go from a Cost Center, they are added/removed from the Cost Center group.

Group names in ProjectWise consist of the Region, a PWZ prefix, and the Cost Center. The easiest way to see what groups you belong to is to view the ***Member Of*** tab from the ***Tools > Options*** dialog box as shown below.
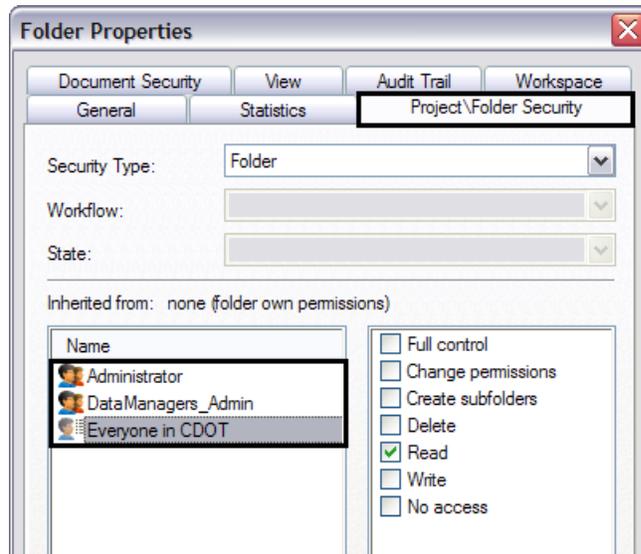

This information is useful in identifying any permission related issues.
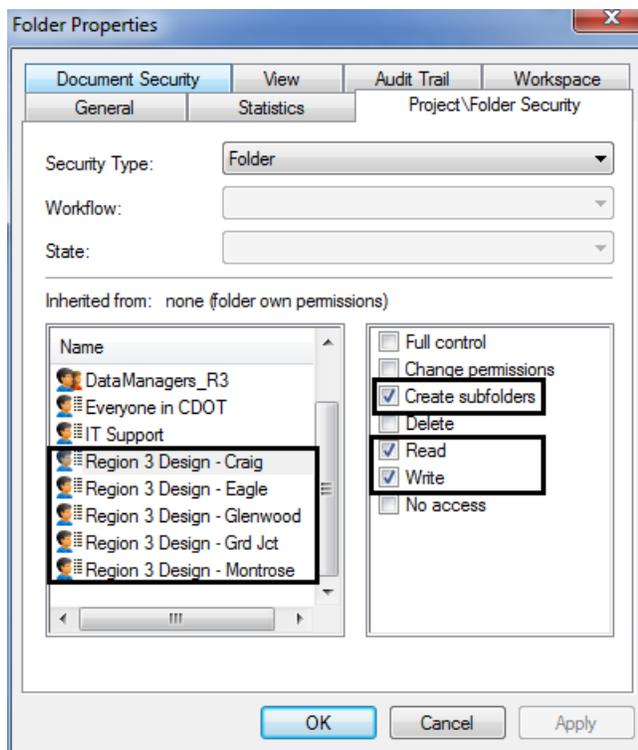
Project/Folder SecurityTab

The ***Project\Folder Security*** tab displays the permission settings for viewing or creating folders under the selected folder. Most folders in ProjectWise will have at least three groups assigned which include:

♦ *Administrator* - This group is comprised of ProjectWise Administrator staff and are responsible for the overall management and maintenance of the ProjectWise environment

♦ *DataManagers_Admin* - This group is made up of local CDOT staff that have limited administrative privileges to help manage local projects.

♦ ***Everyone in CDOT*** - In general, everyone in CDOT is granted read-only permissions to project data

In addition to these three main groups, any group that is working on the project will be assigned to the appropriate sub-folders of the project. An typical example of group assignments to a folder is shown below.

Document SecurityTab

The *Document Security* tab displays the permission settings for viewing or creating documents within the selected folder. The big difference between the Project\Folder Security and Document Security tabs is the addition of *File Read* and *File Write* permissions in the Document Security tab. File Read permissions must be granted in order to see any files that are stored in the selected folder.

In the example below, the *Read* permission allows Everyone in CDOT to see any *folders* stored in the selected folder. The *File Read* permission allows Everyone in CDOT to see any *documents* stored in the selected folder or sub-folders.
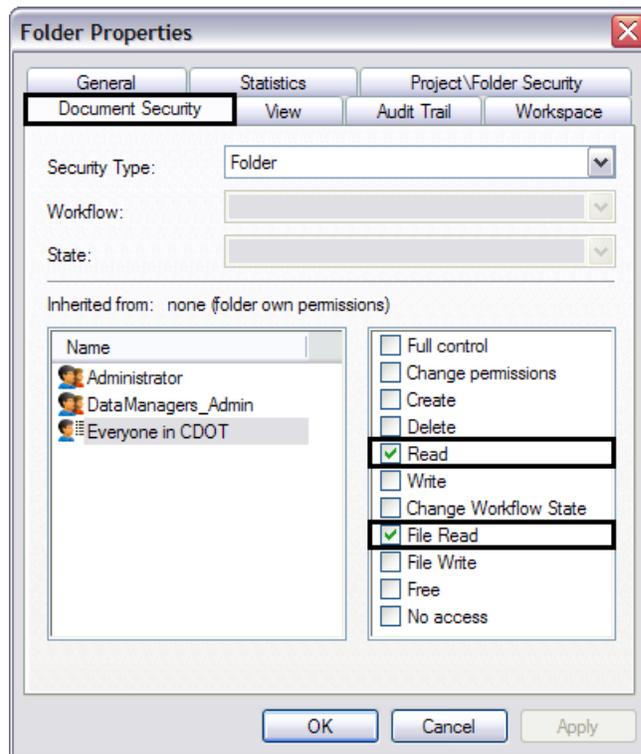
Audit Trail Tab

The *Audit Trail* tab displays a history of activity within selected folder. This history includes any action performed on documents or folders. The information shown in this tab can be customized to show various columns of data by clicking on the Customize... button at the bottom of the tab.
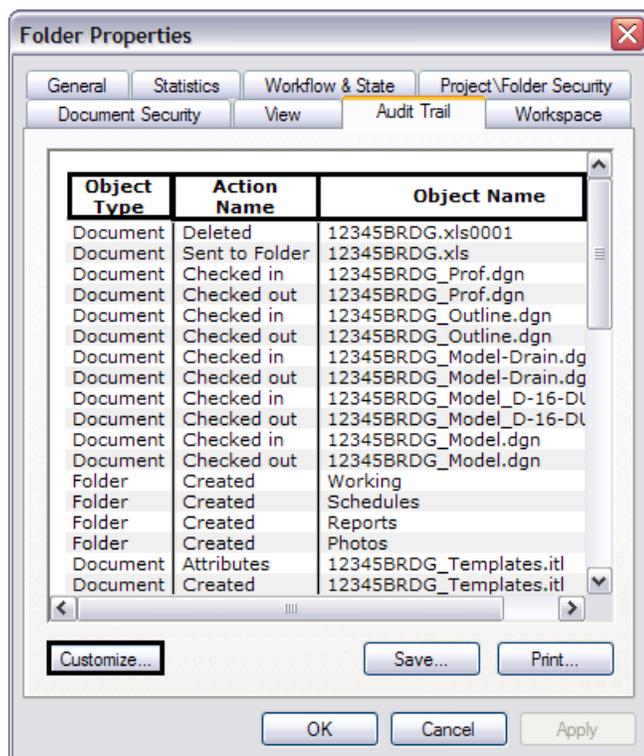
The column *Object Type* refers to whether an action was performed on a Document or a Folder, the column *Action Name* list the action that was performed, and the column *Object Name lists* the document or folder that the specified action was performed on.

Using the audit trail you can see when an object (document or folder) was created, who has accessed the object by viewing it, checking or copying it out, and also if an object was deleted. ProjectWise tracks the username and timestamp for all actions.

Important!   Unlike Windows, when you delete a document or folder from ProjectWise there is not a Recycle bin or Undo feature that will allow you to get the object back. This must be done from the backup. If no backup was created prior to the deletion, the object cannot be restored.

The audit trail can be used to:

♦ Verify if attributes have been set on a file (Filter or sort for the action named *Attributes*.)

♦ Identify any missing files or folders by looking for the *Deleted* action

♦ Identify who may have un-managed copies of project documents by looking for the *Sent to Folder* action