

Workflow PW 3 - ProjectWise CFG Creation

This workflow will guide you through the process of creating project configuration (CFG) files using the ProjectWise **Advanced Document Creation Wizard**. These files are used to associate project staff with their respective roles on the project. These associations are then used to populate attribute drop down menus. In addition, these files provide information to custom applications which are used to automate tasks and messaging for **Workflows and States**. The following mouse mechanics apply to this workflow.

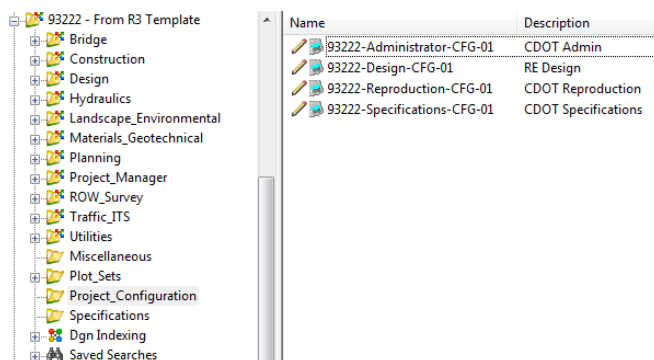


Creating a Project Configuration File

Open ProjectWise Explorer and browse to your project. In all ProjectWise Projects there is a folder called **Project_Configuration**. By default, the following files are populated when the projects are created in ProjectWise:

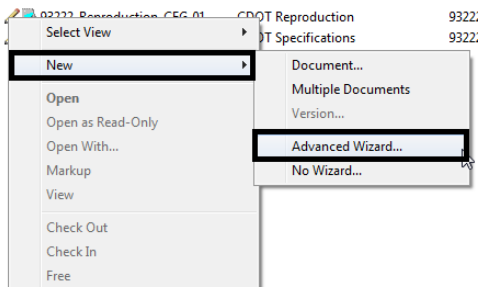
- a. JPC#-Administrator-CFG-01
- b. JPC#-Design-CFG-01
- c. JPC#-Reproduction-CFG-01
- d. JPC#-Specifications-CFG-01

Note: JPC# represents the five digit Job Project Code Number.

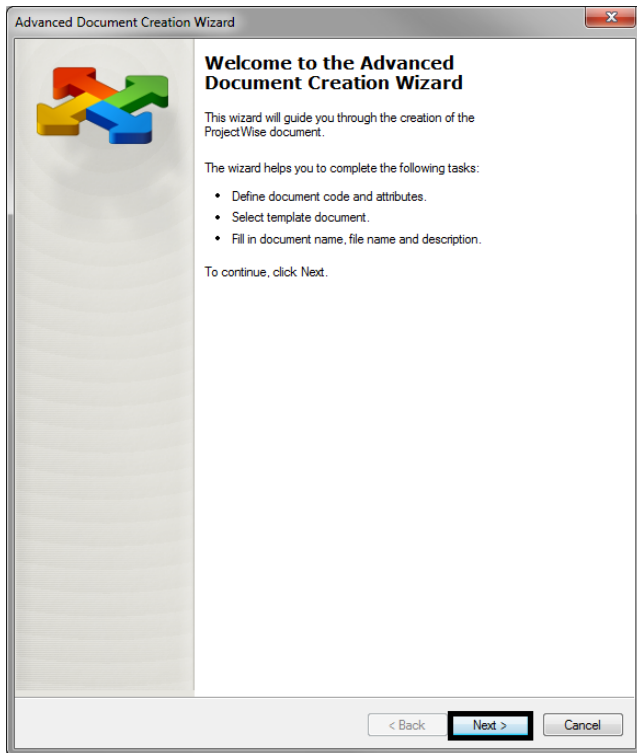


1. To create a new CFG file, <D> click on the **Project_Configuration** folder to make that folder active.

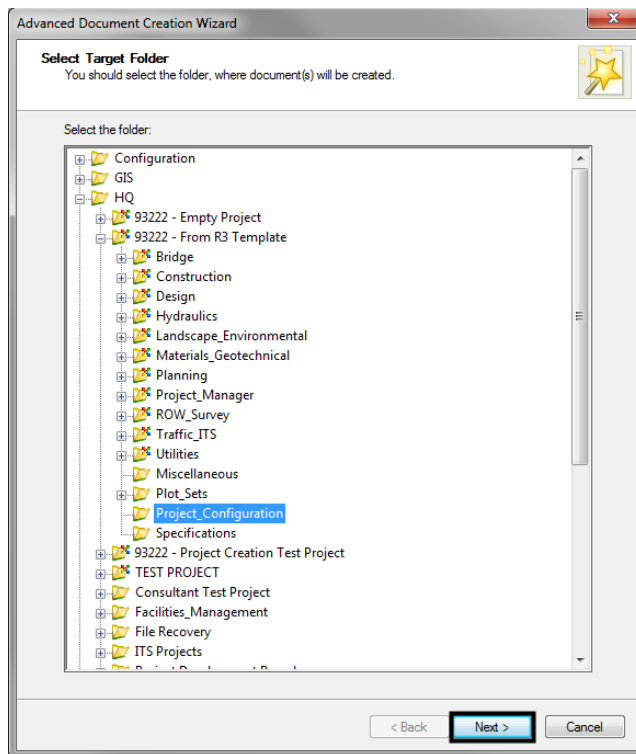
2. <R> click in an open space in the document list view section and select **New > Advanced Wizard...** from the menu options.



3. When the **Advanced Document Creation Wizard** dialog box appears, <D> click **Next**.



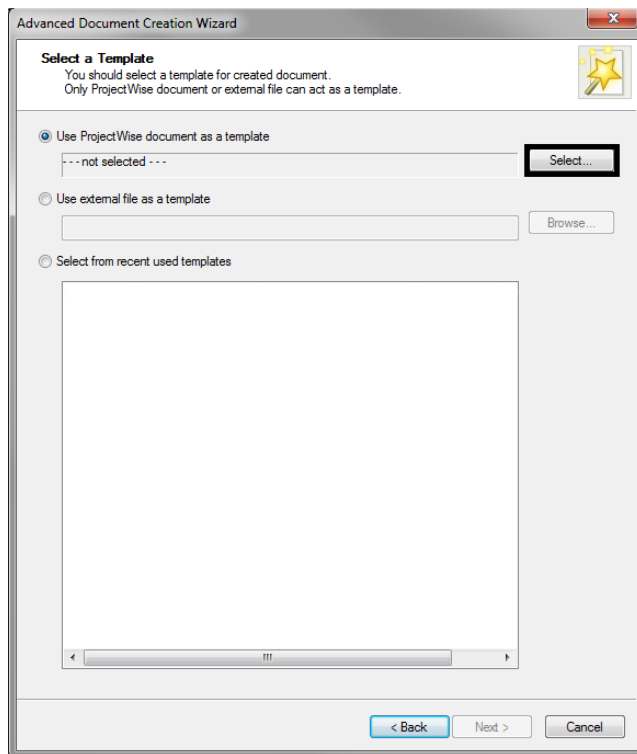
4. The **Select Target Folder** screen appears and will default to the active folder that was selected in step 1. <D> click **Next**.



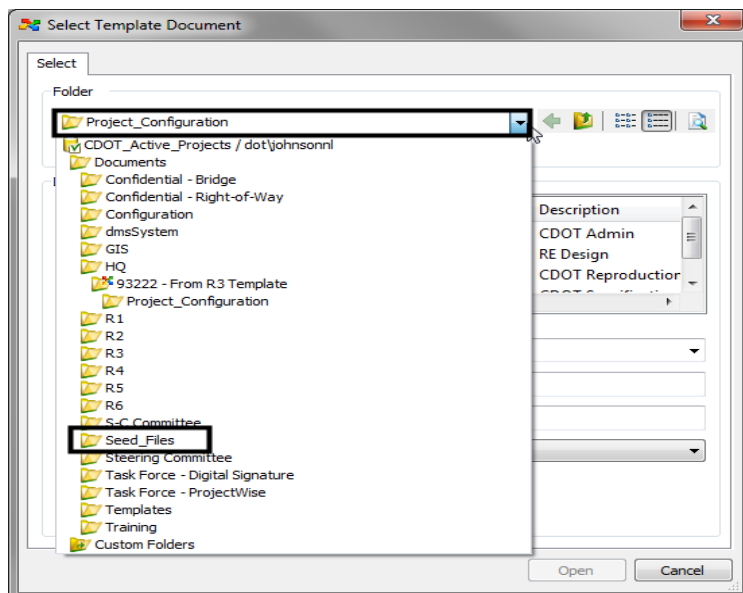
Note: If for any reason the **Project_Configuration** folder is not selected by default, change the target folder back to **Project_Configuration**.

Important! For the new CFG file to be successful, it must be located in the **Project_Configuration** folder.

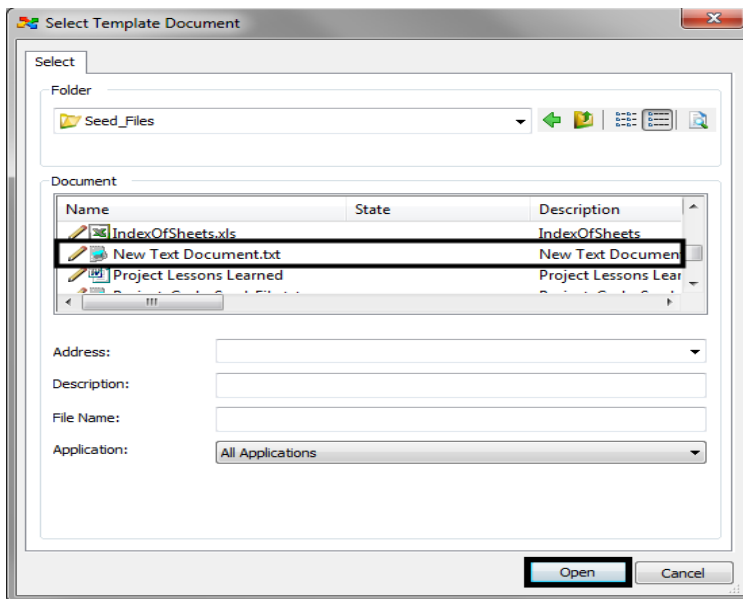
5. The **Select a Template** screen is next. By default the **Use ProjectWise document as a template** radio button is selected. <D> click on the **Select** button to choose a file.



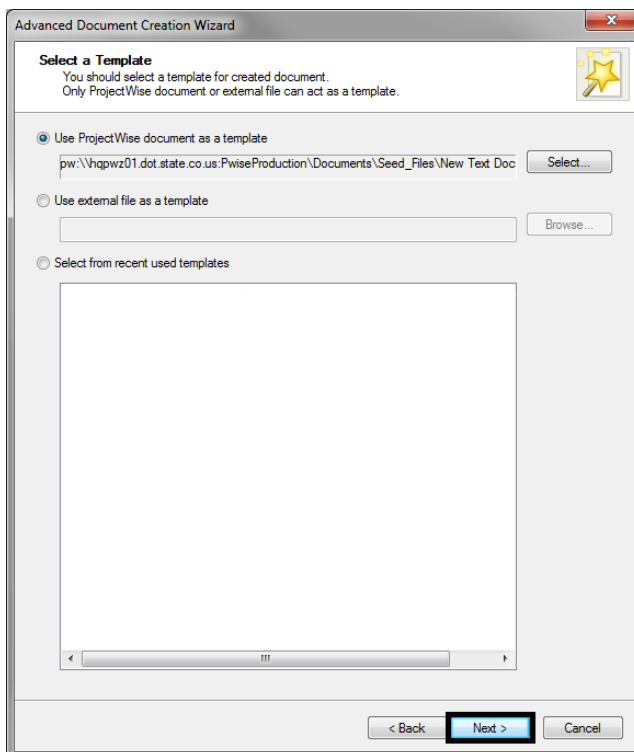
6. Select the **Seed_Files** folder in ProjectWise from the **Folder drop down** box.



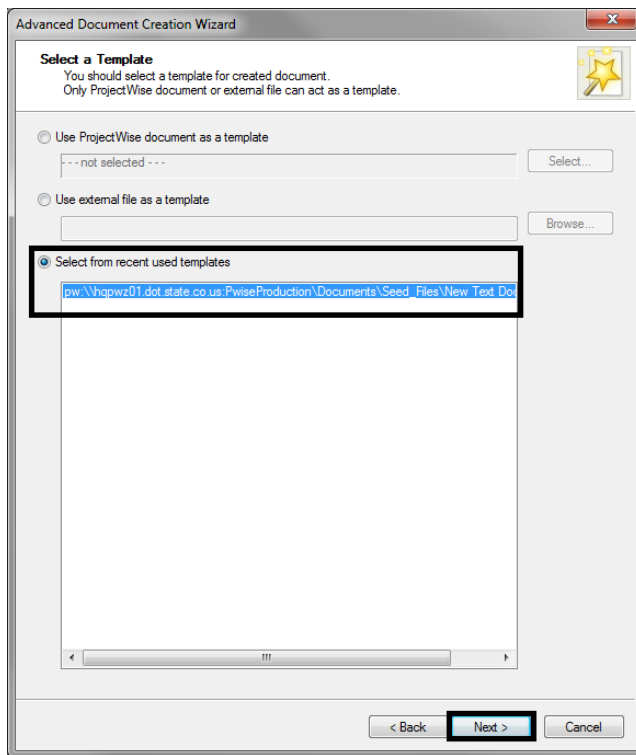
- In the Document section, select **New Text Document.txt** from the document area and <D> click the **Open** button.



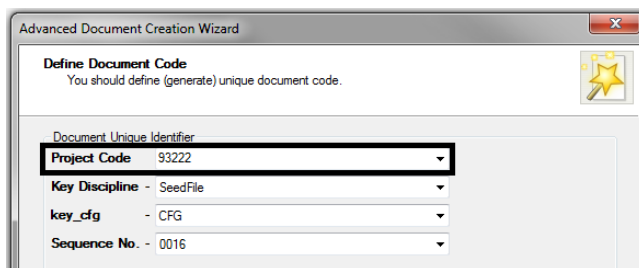
- Back at the **Select a Template** screen you will notice the **Use ProjectWise document as a template** is populated with the file you just opened. <D> click the **Next** button.



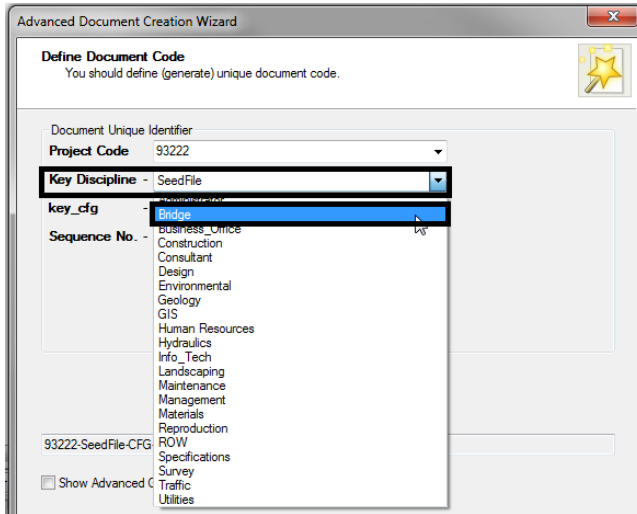
Note: After you have completed the first **Advanced Document Creation Wizard**, the file **New Text Document.txt** will be listed under the **Select from recent used templates** radio button. On any new **Advanced Document Creation Wizards** this option may be used to speed up the creation process.



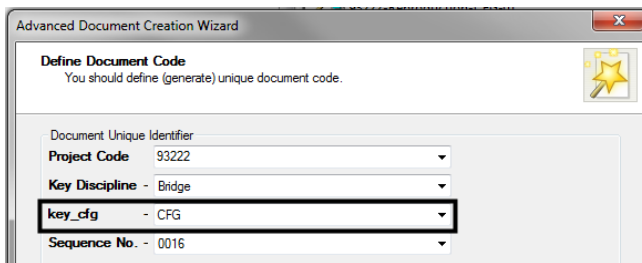
9. In the **Define Document Code** screen, use the drop down boxes to select the applicable attribute values or you can key them in directly. The attributes values you specify on this screen will be used to define the filename of the new CFG file. The following steps a. through d. describe how to fill out these attributes.
 - a. **Project Code** - You can select the project code from the drop down menu or you can Key-in the value directly.



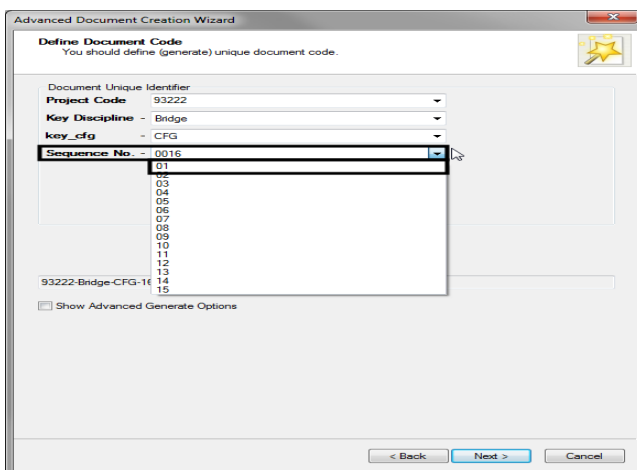
- b. **Key Discipline** - Use the drop down box to select the discipline for the CFG file



- c. **Key_cfg** - This value can not be changed



- d. **Sequence No.** - In general there are 16 values you can use for each discipline which you can assign to your CFG file. Set this value to the next sequential number that has not been used for the specified discipline. Use a value of **01** if this is the first CFG file being created for the discipline.



10. Once you have filled out the correct values, <D> click the **Next** button.

11. The next screen is the **Define Document Attributes** screen. In this screen you will enter the values for specific **Unit Attributes**. The following steps a. through h. describe how to fill out these attributes.

- a. **Organization Code** - This drop down lists all the CDOT cost centers. Just like the Project Code, this is a long list and so it may be easier to hand-type in the cost center code rather than picking it from the drop down. Once you populate the value for the cost center, press the **Tab** key.

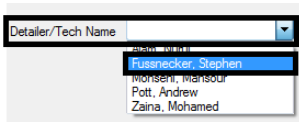
Note: The organization code you select here should be for the cost center that will perform the work in the specific discipline. Also, do not use special cost center numbers, such as the Bridge Enterprise cost center, since they are mainly used for SAP purposes.

- b. **Unit Title** - Once the Organization Code has been selected this field is populated automatically
- c. **Unit Leader** - Once the Organization Code has been selected this field is populated automatically but can be modified if needed
- d. **Initials** - Automatically populated based on the Unit Leader attribute
- e. **Unit Leader Name** - Automatically populated based on the Unit Leader attribute

- f. **Project Manager** - The available values for this field are limited to staff that are assigned to the specified Organization Code. Use the drop down box to specify the staff assigned to this project role.

- g. **Designer Name** - The available values for this field are limited to staff that are assigned to the specified Organization Code. Use the drop down box to specify the staff assigned to this project role.

- h. **Detailer/Tech Name** - The available values for this field are limited to staff that are assigned to the specified Organization Code. Use the drop down box to specify the staff assigned to this project role.

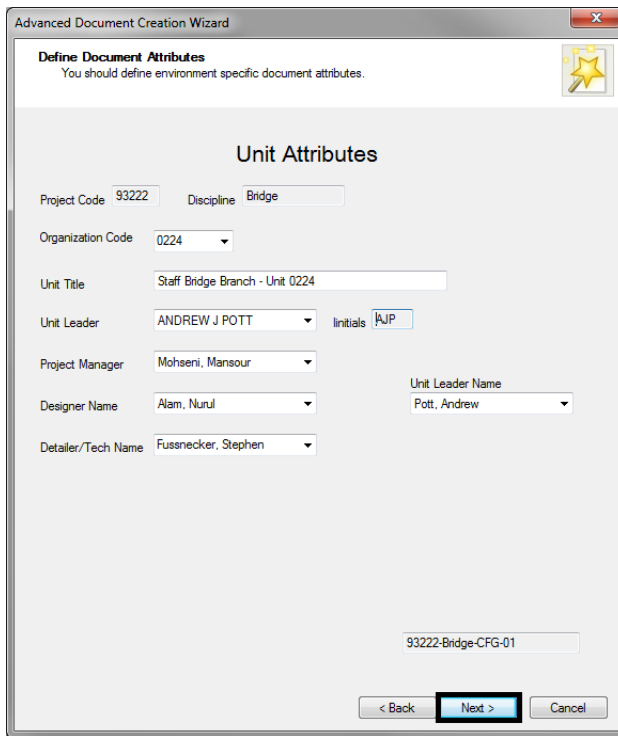


Note: The fields above in steps g and h control what values will be populated in the **Attributes** tab of the Document properties dialog box for each respective discipline.

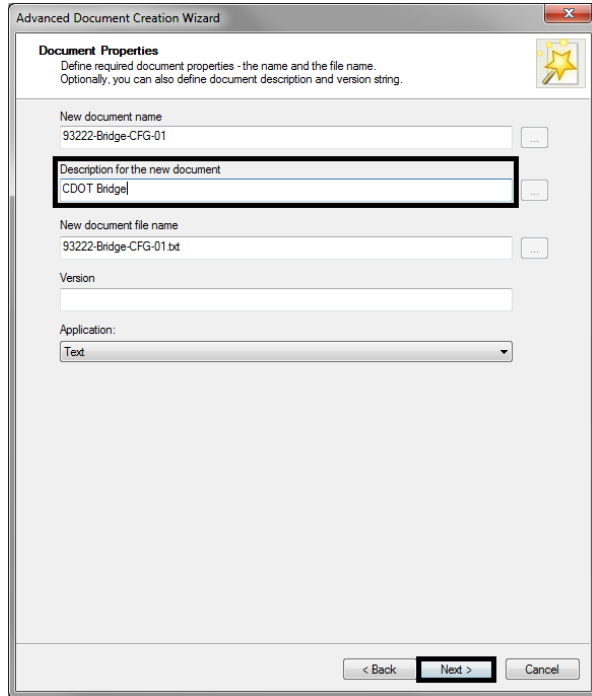
Note: **Project Manager**, **Designer Name**, and **Detailer/Tech Name** are optional fields and may be left blank if these roles are not yet assigned or necessary on the project. Use the **Del** key to remove these values. You can edit the CFG file to include these assignments once these roles defined.

Important! Occasionally the Unit Leader name will not appear and must be manually selected from the pull down menu. This is an important step as it defines the e-mail address of the unit leader that is used in conjunction with Workflow and States.

- 12. Once you are satisfied with the attribute values for these fields, <D> click the **Next** button.



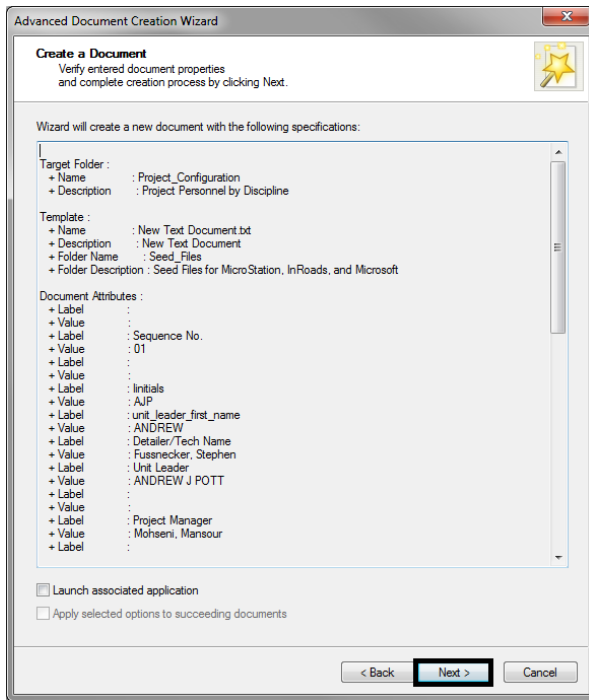
13. On the **Document Properties** screen, enter a description in the **Description for the new document** field to summarize the details of the CFG file such as the Unit, Designer, and/or Detailer selected for this CFG file. <D> click the **Next** button.



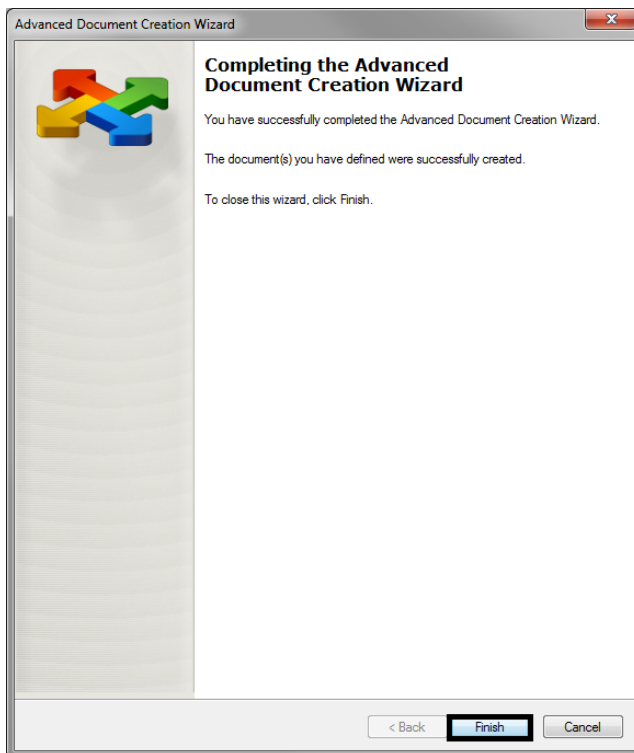
The screenshot shows the 'Advanced Document Creation Wizard' window, specifically the 'Document Properties' step. The window title is 'Advanced Document Creation Wizard'. Below the title bar, there is a section titled 'Document Properties' with a yellow star icon. The instructions read: 'Define required document properties - the name and the file name. Optionally, you can also define document description and version string.' The form contains several fields: 'New document name' with the value '93222-Bridge-CFG-01'; 'Description for the new document' with the value 'CDOT Bridge|', which is highlighted with a black border; 'New document file name' with the value '93222-Bridge-CFG-01.txt'; 'Version' which is empty; and 'Application:' with a dropdown menu set to 'Text'. At the bottom of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a black border.

14. The **Create a Document** screen allows you to review of the attribute values selected on the previous screens. If you need to change any of the values, use the **Back** button to navigate to the appropriate screen. Once you are satisfied with the attribute values, <D> click the **Next** button to continue.

15. After you click **Next**, the document will be created.



16. <D> click the **Finish** button to close out of the **Advanced Document Creation Wizard** dialog box.



17. The new **Discipline** CFG is now listed in the **Project_Configuration** folder of the project

Name	Description	File Name
93222-Administrator-CFG-01	CDOT Admin	93222-Administrator-CFG-01.txt
93222-Design-CFG-01	RE Design	93222-Design-CFG-01.txt
93222-Reproduction-CFG-01	CDOT Reproduction	93222-Reproduction-CFG-01.txt
93222-Specifications-CFG-01	CDOT Specifications	93222-Specifications-CFG-01.txt
93222-Bridge-CFG-01	CDOT Bridge	93222-Bridge-CFG-01.txt

Important! When cost centers perform work across multiple disciplines, separate CFG files need to be created for each discipline/cost center/role combination. To illustrate, refer to the following table:

Project Roles

Discipline	Cost Center	Role Designer	Role Detailer
Design	0224	Joe	Amy
Design	0224	Amy	Joe
Design	0324	Stewart	Sheila
Hydraulics	0224	Joe	Cody
ROW	0324	Sheila	David
ROW	0324	Bradley	Sheila

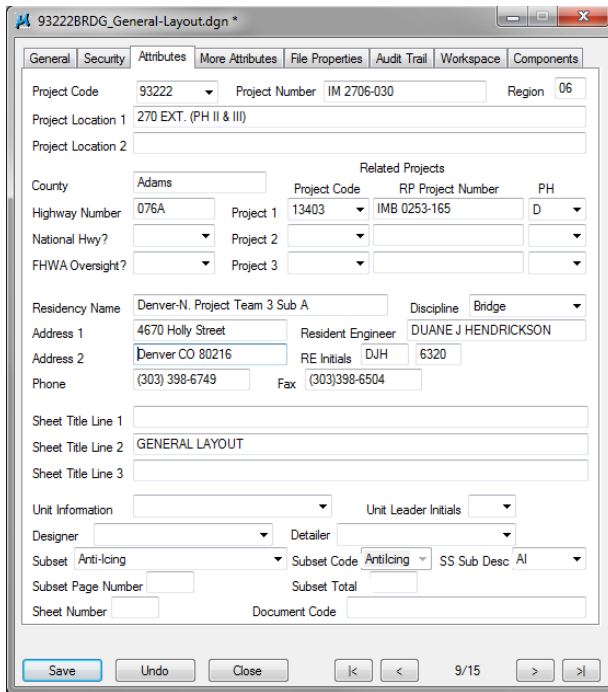
Based on the table above, the following table lists the CFG files that would need to be created using various methods:

Filename	Description	Details
93222-Design-CFG-01.txt	0224 R2 Design - Joe	Assign Joe as Designer and as Detailer
93222-Design-CFG-02.txt	0224 R2 Design - Amy	Assign Amy as Designer and as Detailer
93222-Design-CFG-03.txt	0324 R3 Design	Assign Stewart as Designer and Sheila as Detailer
93222-Hydraulics-CFG-01.txt	R2 Hydraulics	Assign Joe as Designer and Cody as Detailer
93222-ROW-CFG-01.txt	R3 ROW (Sheila/David)	Assign Sheila as Designer and David as Detailer
93222-ROW-CFG-02.txt	R3 ROW (Bradley/Sheila)	Assign Bradley as Designer and Sheila as Detailer

CFG's with Title Block Integration

Roles defined in the CFG files are used to populate the various attribute pull-down menus located on the **Attributes** tab of the Document properties dialog box. These attribute values are then used to automatically populate corresponding data of the MicroStation title block. This functionality significantly reduces the time staff spend on entering and updating this data in the title block and reduces the errors in entering the data manually. The following steps use a Bridge title block to illustrate this functionality.

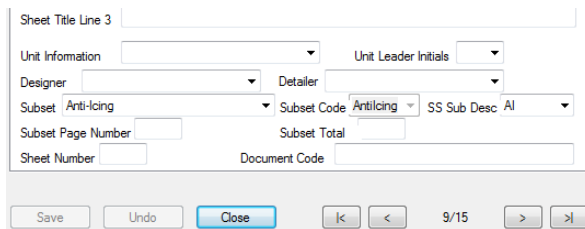
1. Choose a file from the Bridge discipline of your project and open the Properties dialog box and <D> on the **Attributes** tab.



Note: Based on the **Project Code**, many attributes have automatically been populated.

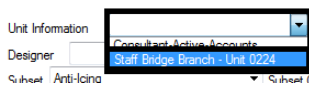
Important! The **Discipline** attribute is what determines which CFG values are used for this document. The default value for the discipline is set to match the discipline folder, but can be changed if needed.

The details defined in the project CFG files are automatically populated in the pull-down menus for the respective fields for the attributes in the interface as shown below.

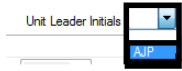


Note: Available attribute values are based on a cumulative list of all the CFG files defined for the discipline.

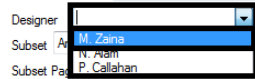
2. Use the pull-down menus to select the values for the following attributes.
 - a. **Unit Information**



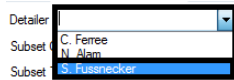
- b. **Unit Leader Initials** - Set this to the initials of the Unit Leader that was set in the Unit Information



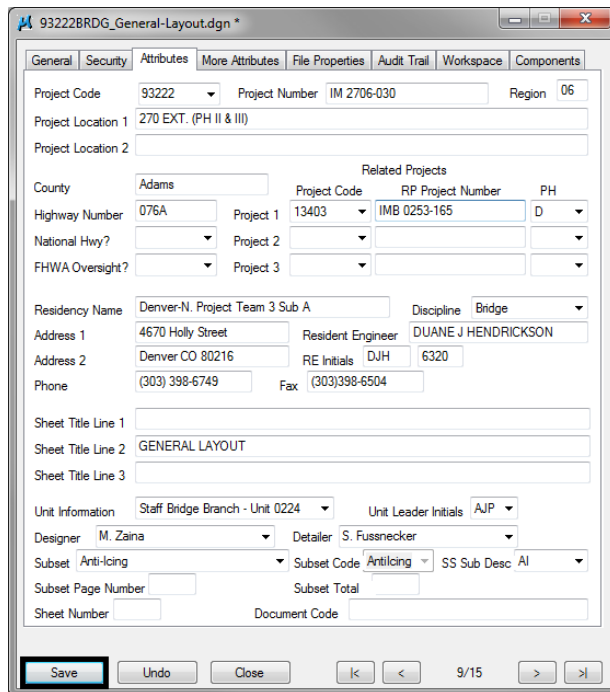
- c. **Designer** - Pick from the list the Designer who is responsible for this sheet



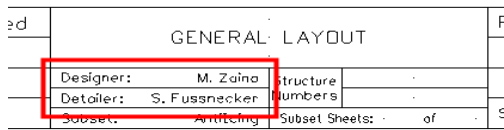
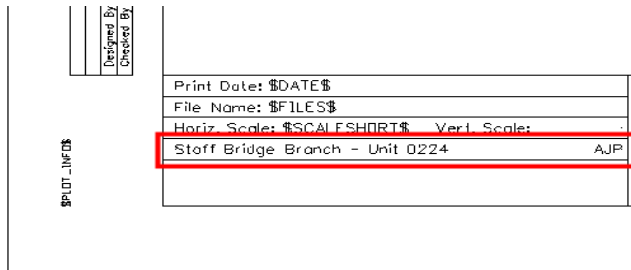
- d. **Detailer** - Pick from the list the Detailer who is responsible for this sheet



- 3. <D> click the **Save** button to accept the changes to the attributes.



- Open the General-Layout.dgn file from your project. The attribute values entered in ProjectWise will automatically be displayed in the title block through title block integration.



Note: If you are working on an older existing project, title block integration may not work on your project as noted above. However, you can follow the instruction in the workflow **Update Project Sheet Border to a ProjectWise Sheet Border** to update your title blocks so they work with title block integration.

