

CDOT Workflow – ProjectWise Web Access Operations

ProjectWise offers a Web-based method for accessing project data from existing CDOT datasources. This document includes instructions for configuring Internet Explorer for ProjectWise access, logging into CDOT datasources, navigating the Web based ProjectWise interface, and managing documents.

The Web Interface can only be used on non CADD/ Civil Data. Users must have a valid CDOT Log in with ProjectWise access. For those agencies/consultants that do not currently have a valid CDOT Login, please refer to the following workflow:

Setup an account to access CDOT ProjectWise

External users will need to work with their assigned CDOT Project Manager to obtain an Information Interchange Account.

1. Use the following link to download the form **INFORMATION INTERCHANGE ACCOUNT REQUEST FORM - CONSULTANT/CONTRACTOR** (IIAR form #1275):
[CDOT Form 1275 - Information Interchange Account Request Form - Consultant/Contractor](#)
2. Fill out the form following the instructions at the top of the first page. In the SERVICES section, type in ProjectWise in the Other category.
3. You will need three signatures on the form: 1) your signature, 2) the signature of an official from your firm, and 3) the signature of the CDOT Project Manager (PM). After the PM signs the form, FAX the request form to the number listed at the top of the form.
4. Once the request is approved, CDOT will send an assigned username and password to the email address specified on the request form. You will use these credentials to login to ProjectWise.

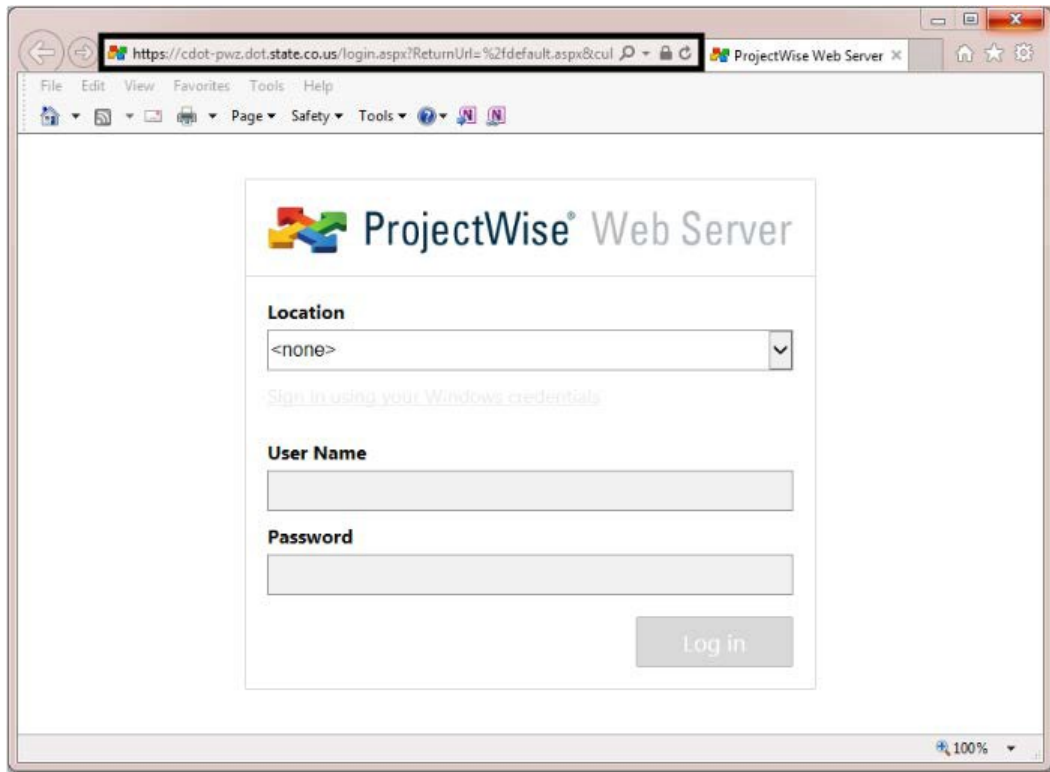
Internet Explorer configuration

ProjectWise Web Server uses ActiveX controls that only function correctly when using Internet Explorer. Other browsers (Chrome, Firefox, Safari) will work for most basic operations, but IE is the preferred browser for ProjectWise Web access. **Only 32-bit versions of IE 10 or under are supported.**

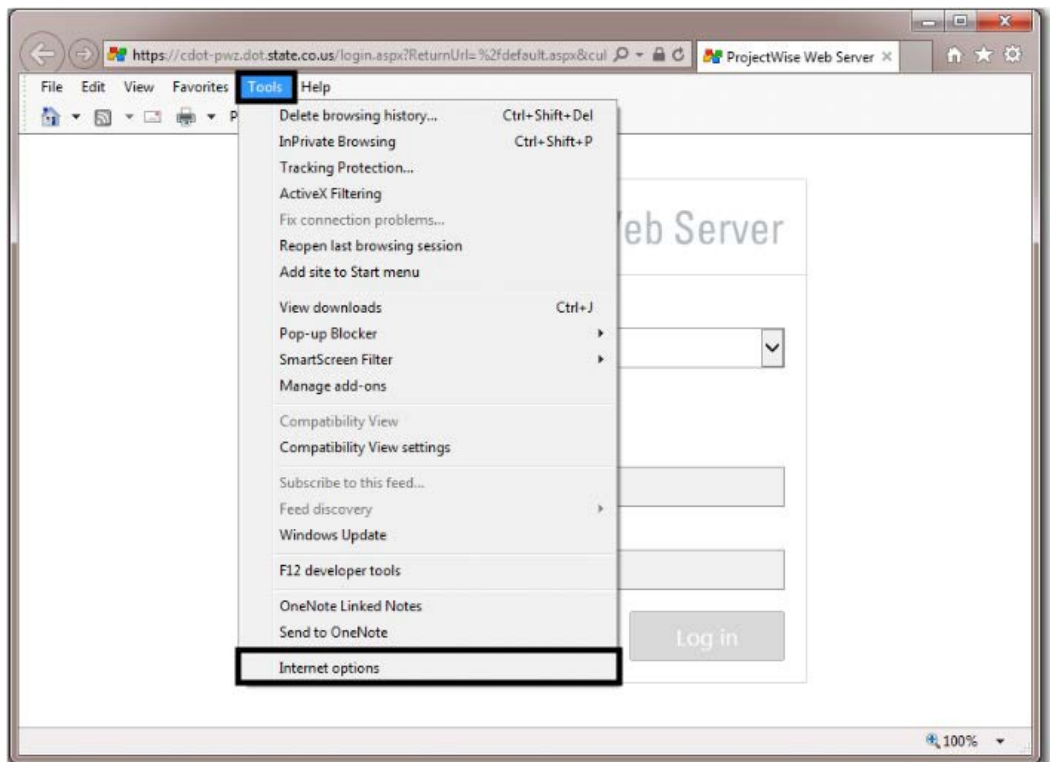
The steps below describe how to configure Internet Explorer for ProjectWise Web Access. ProjectWise Web Access requires that the website is added to Internet Explorer's Trusted Sites list, and that the Popup Blocker is disabled.

The first step is to add the CDOT ProjectWise web access page to Internet Explorer's list of Trusted Sites.

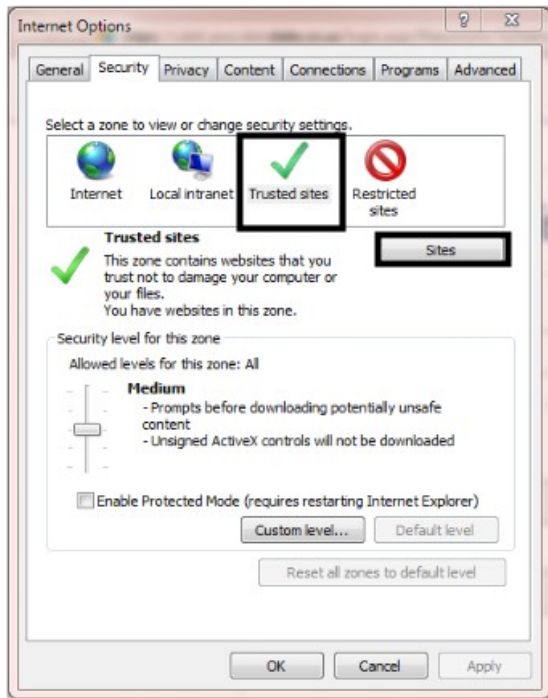
1. Launch Internet Explorer and enter
<https://cdot-pwz.dot.state.co.us>



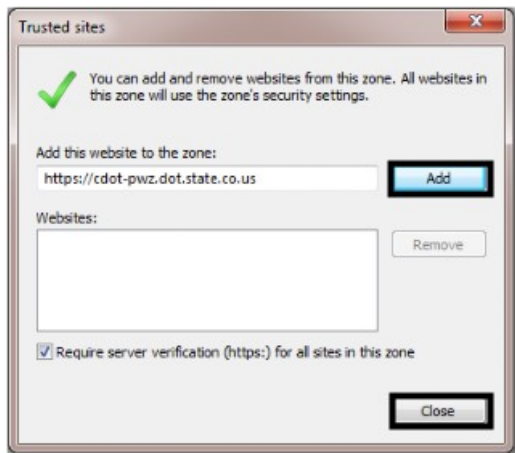
2. Click the Tools button, and then click Internet Options.



3. In the **Internet Options** dialog box, click the **Security** tab, and then click the **Trusted sites** security zone.
4. Click **Sites**.



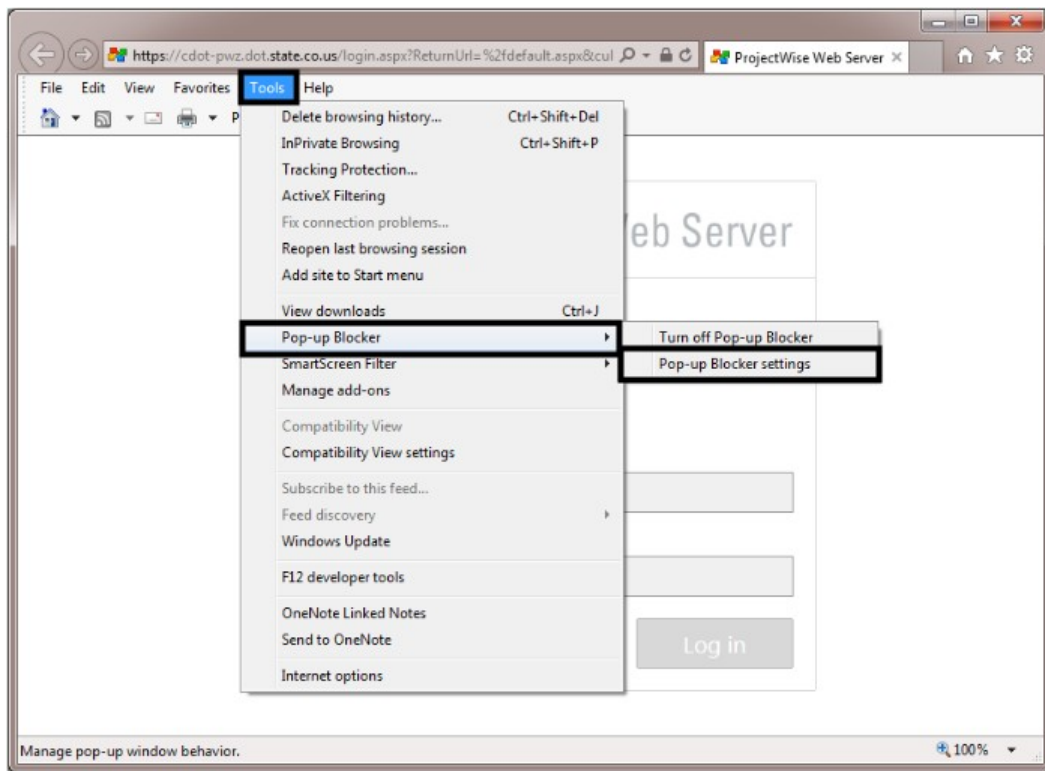
5. The website is shown in the **Add this website to the zone** field. Click **Add**.
6. Click **Close** to accept the change and dismiss the **Trusted Sites** dialog box.



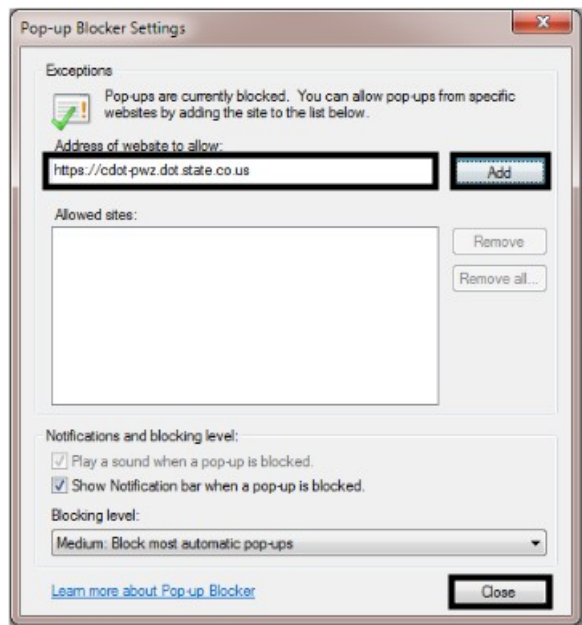
7. In the **Internet Options** dialog box, click **OK** to complete the operation and dismiss the dialog box.
- 8.

The second step is to turn off the Popup Blocker for the website .

1. From the Internet Explorer menu bar, Select **Tools > Pop-up Blocker > Pop-up Blocker Settings**.



2. In the **Address of Web site to allow** box, type the address of the Web site, and then click **Add**.
3. Click **Close** to accept the change and dismiss the **Pop-up Blocker Settings** dialog box.

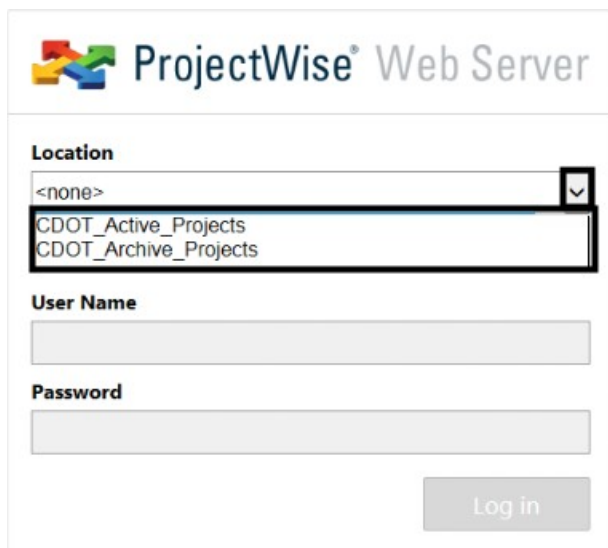


If “install ActiveX controls” prompts are while browsing, allow the installation. The ProjectWise Web Server requires several ActiveX controls in order to transfer files. If the computer’s security settings prevent installation of ActiveX controls, please contact your IT department for assistance.

Logging in to ProjectWise Web Server

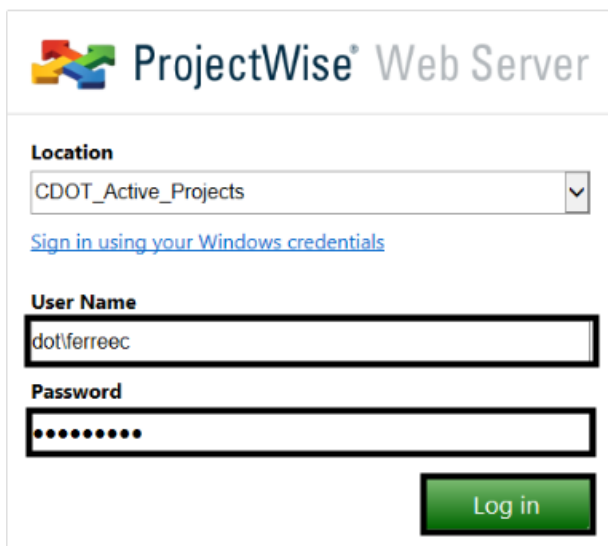
The process of logging in to ProjectWise using the Web interface is much the same as logging in using ProjectWise Explorer, although the interface looks a little different .

1. Click the arrow in the **Location** window to display the datasource list.
2. Select the desired datasource.



The screenshot shows the ProjectWise Web Server login interface. At the top, there is a logo with three interlocking cubes (red, green, blue) and the text 'ProjectWise Web Server'. Below this is a 'Location' dropdown menu currently set to '<none>'. The dropdown is open, showing a list of options: '<none>', 'CDOT_Active_Projects', and 'CDOT_Archive_Projects'. Below the dropdown are two text input fields: 'User Name' and 'Password'. At the bottom right, there is a 'Log in' button.

3. Enter your user name in the **Username** box using the format **dot\username**.
4. Enter your password in the **Password** box.
5. Click **Log in**.

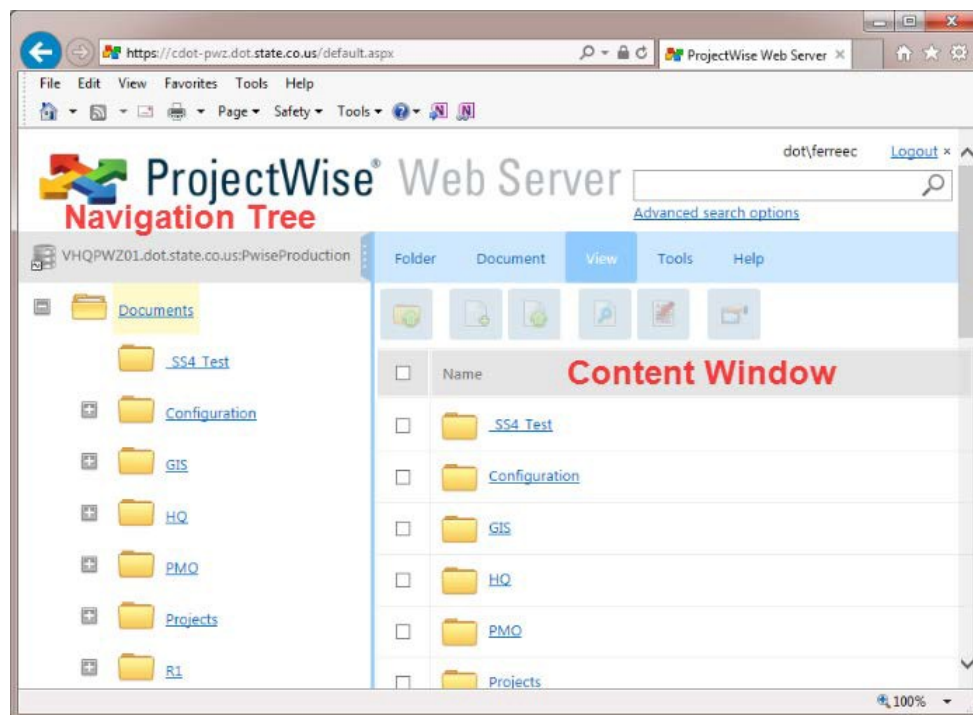


The screenshot shows the ProjectWise Web Server login interface after the user has selected a location. The 'Location' dropdown menu is now set to 'CDOT_Active_Projects'. Below the dropdown is a blue link that says 'Sign in using your Windows credentials'. The 'User Name' field now contains the text 'dot\ferreec'. The 'Password' field contains a series of dots, indicating that the password is masked. At the bottom right, there is a green 'Log in' button.

The datasource is displayed and is ready for use.

Navigating in ProjectWise Web Server

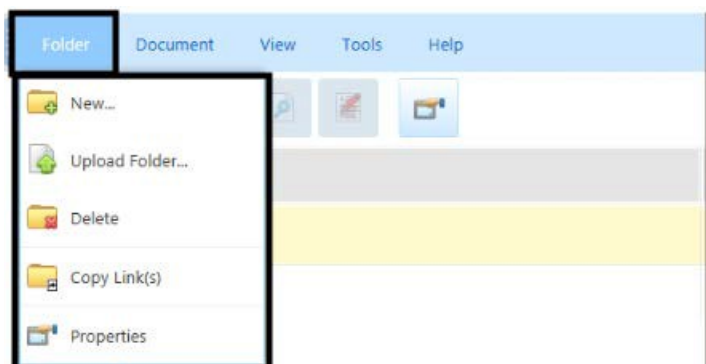
The ProjectWise Web Server window is organized in two panes, similar to the top two panes in ProjectWise Explorer. On the left-hand side, the Navigation Tree lists the datasource's directory structure tree. On the right-hand side, the Content window lists the contents of the currently selected folder. The structure and contents are the same as they are in ProjectWise Explorer, and can be navigated the same way.



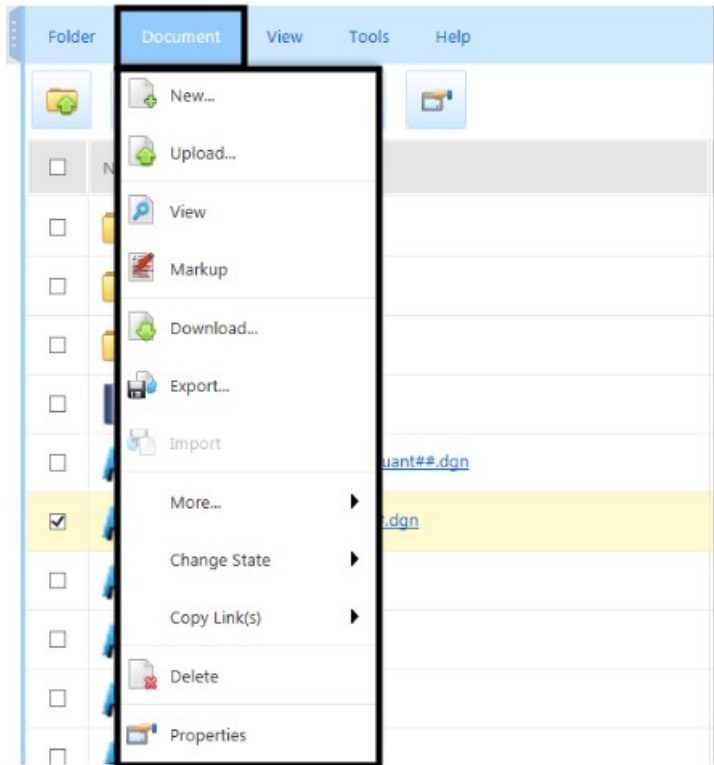
Menu Bar and Buttons

The **Menu Bar** is located above the Content window. It has several options with submenus. Not all options will be available, depending on general ProjectWise permission settings or account permissions.

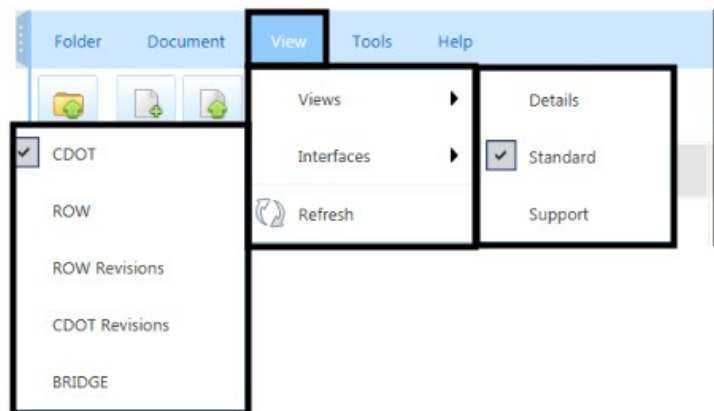
Folder – Folder operations include creating a new folder, uploading a folder from your PC, deleting a folder, copying links, and displaying folder properties.



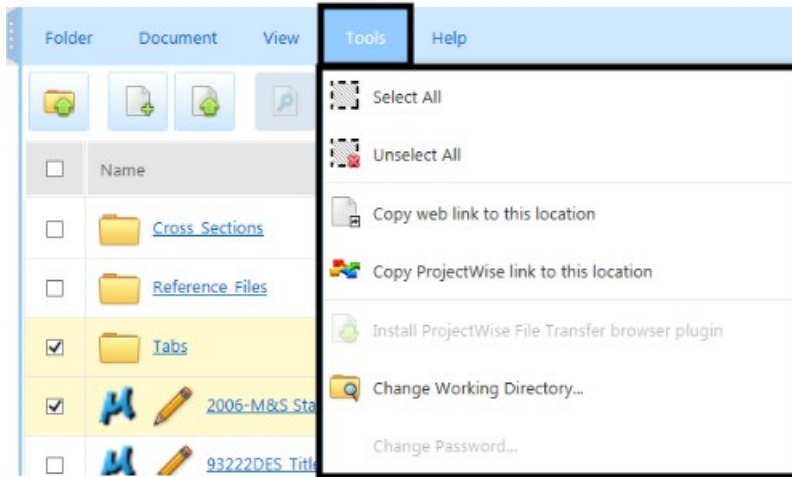
Document – Document operations include creating, uploading, downloading, exporting, importing, viewing and deleting documents, Submenu options include creating Web Link and ProjectWise links to documents, changing workflow states (where applicable), opening documents for viewing or editing, checking out/checking in, copying out, and purging local copies.



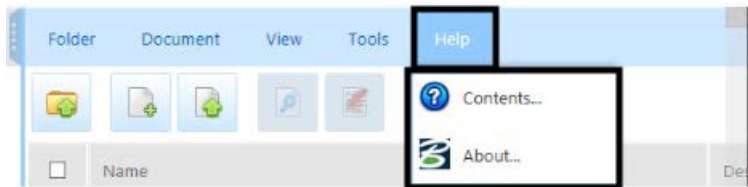
View – Views created in ProjectWise can be used here. The specialty group interfaces can also be accessed from this menu.



Tools – Tools include options to select/unselect all documents in a folder, copy web or ProjectWise links into a folder, change working directories on your local PC, change password, and manually install the ProjectWise file transfer browser plugin.

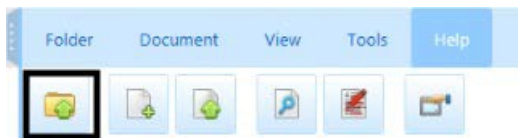


Help – Help menu for ProjectWise Web Access.



The **Button Bar** underneath the **Menu Bar** contains six buttons. Hovering the mouse pointer over each button displays a Tool Tip, indicating the button's function.

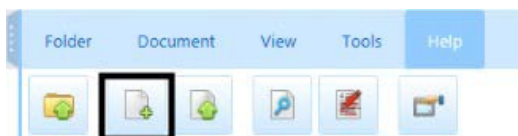
Go to Parent Item – move up a level in the navigation tree.



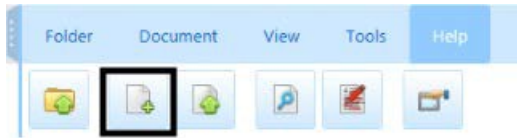
New... - create new document.



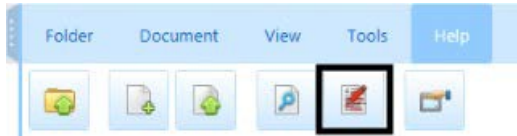
Upload... - upload a document from your PC.



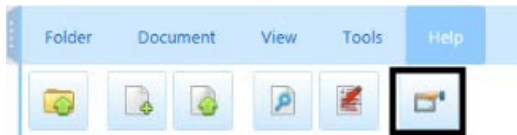
View... - open a document for viewing. If the document requires software not installed on the viewing computer, the file will be downloaded.



Markup - The markup feature is not available at this time.



Properties – display file properties.



Document Handling Procedures – Check Out/Check In

ProjectWise Web Server has several methods for handling documents. Documents are downloaded to a working directory on the local PC, and then can be opened for viewing or editing. Once a document has been edited, it can be uploaded again.

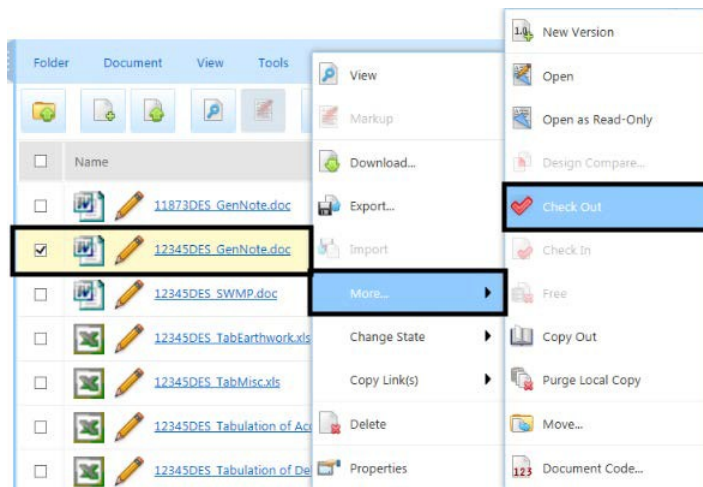
Most of the methods of downloading documents do not lock the file, which allows others to download a copy at the same time. With multiple copies downloaded for editing, the risk of uploading a copy and overwriting someone else's editing becomes very real. For this reason, the preferred method of handling document downloading and editing is to **check out** and **check in** the document.

Important! - ProjectWise Web Server may not automatically delete local copies when checked in or closed after viewing. To ensure that local copies are removed after use, follow the instructions for **Purge Local Copy** below for each document that is checked in or viewed without checking out. Failure to purge local copies can result in the loss of previous edit and different versions of the same document on local computers and ProjectWise.

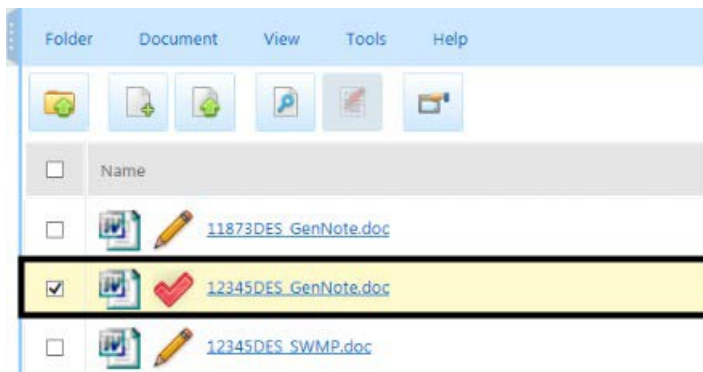
Checking out a document places a copy in your working directory

To Check Out a document:

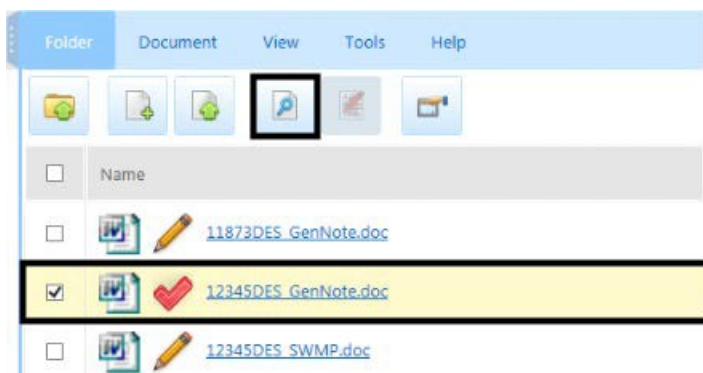
1. Right-click on a document from the **Content** window.
2. Select **More** from the pop-up menu.
3. Select **Check Out**.



The file is downloaded to the working directory, and the status icon changes to a red check mark.



4. Click the **View** button to open the document for review or editing. This opens the local copy automatically so that you don't have to search for it.

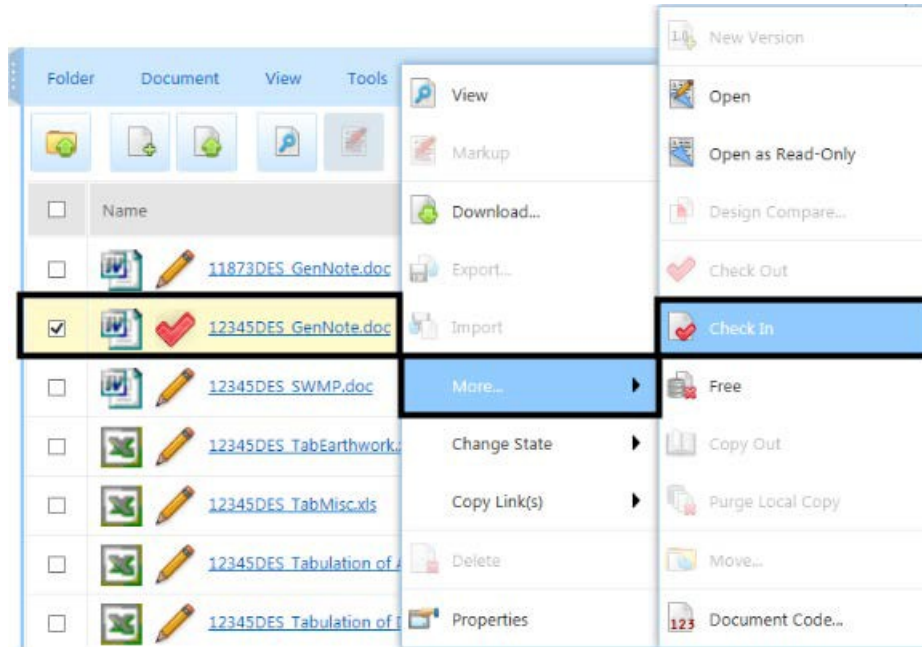


Note – The document can also be opened by selecting **View** from the right click menu.

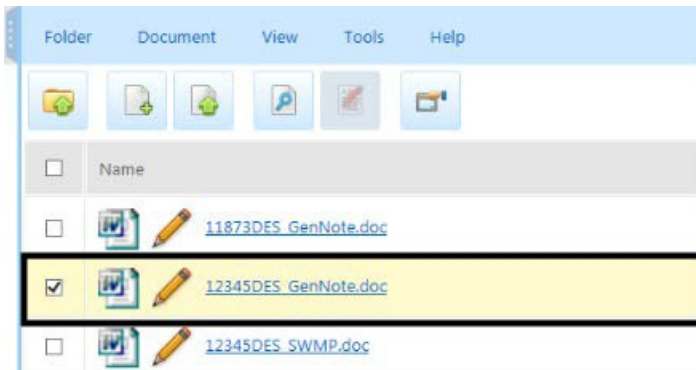
Note – The software for the selected document must be installed on the local PC in order to open the file.

To Check In a document:

1. Navigate to the document's location in ProjectWise and locate the document.
2. Right-click the document and Select **More** from the pop-up menu.
3. Select **Check In**.

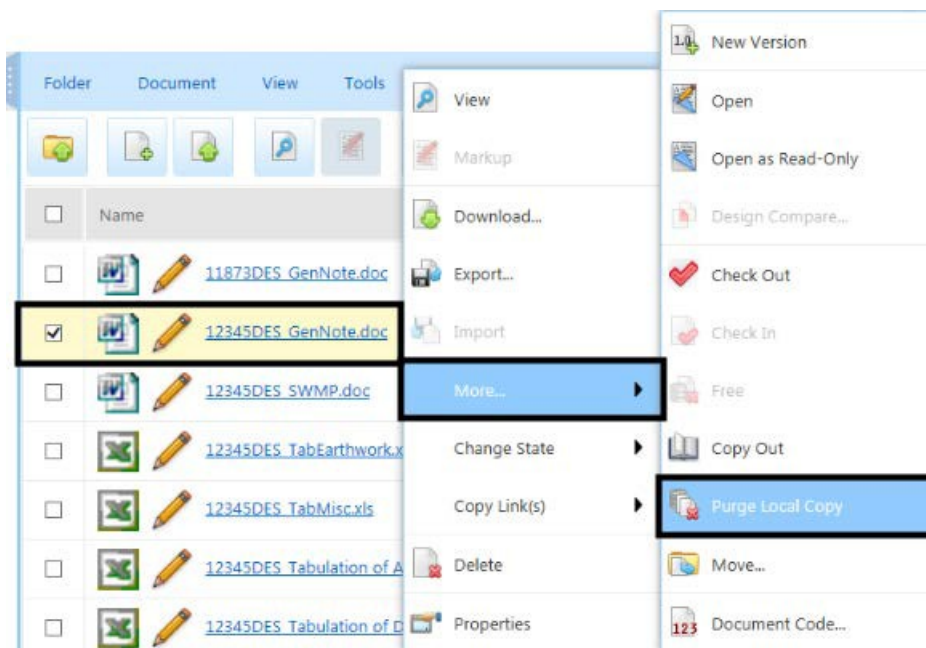


The edited file is uploaded from the working directory, and the status icon changes to a pencil.



To ensure that the file in ProjectWise is used the next time the file is checked out, the local copy must be purged. To purge the local copy:

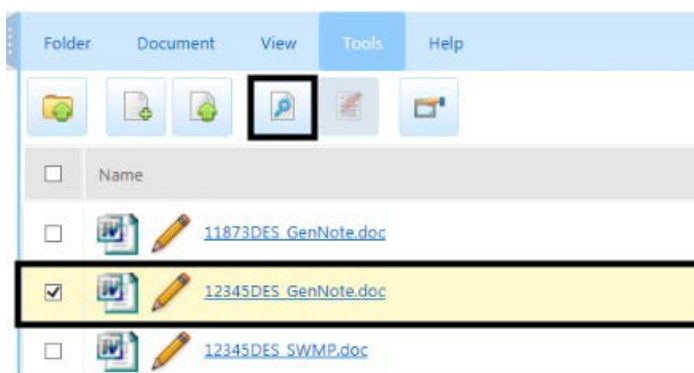
4. Right-click the document and Select **More** from the pop-up menu.
5. Select **Purge Local Copy**. This deletes the copy from the working directory on the local PC.



File Viewing

If you do not need to edit a document, you can simply View the document.

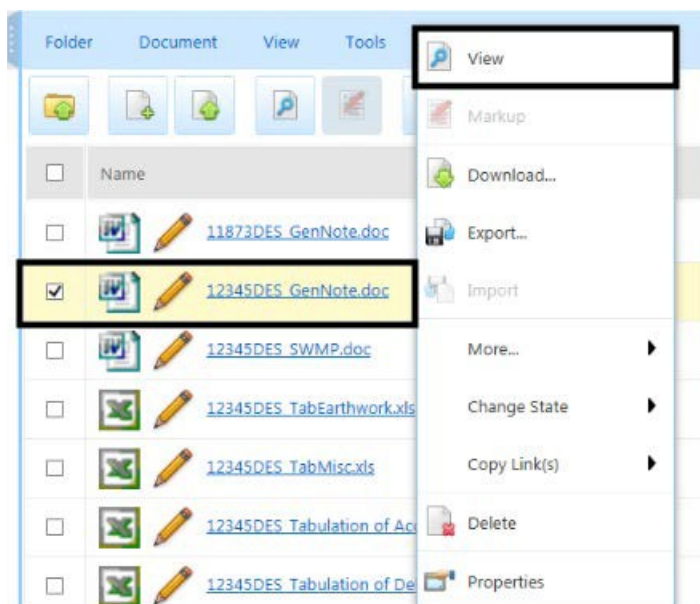
1. Select the document in the **Content** window.
2. Click the **View** button.



Or

1. Right-click the document in the **Content** window.

2. Select **View** from the pop-up menu.



Either method requires the correct software installed to open the file. If you do not have the software necessary to open the file, it will simply be downloaded to your computer.

To ensure that the file in ProjectWise is used the next time the file is opened, the local copy must be purged. To purge the local copy:

1. Right-click the document and Select **More** from the pop-up menu.
2. Select **Purge Local Copy**. This deletes the copy from the working directory on the local PC.

